



## ***Cell Manufacturing Technologies***

### ***Client Database***

# **USER MANUAL**

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# Introduction

**CMaT Client Database** is a customer membership management program. The project was carried out by group 2 of the course TINFO 370, University of Washington Tacoma; Instructor: Dr. Jim West. The project was based on the request of client Scott Ransom, PhD. The program aims to automate the customers membership management of Scott and was built on C# language with SQL Server as database.

Team 2 member's credit:

- *Project Lead* – **Trevor Parker**
- *Developer, Designer* – **Duc Vy Dang**
- *Technical Writer* – **Axel Cortes**
- *Idea Design* – **Shilong Nie**
- *Associate* – **Paul Joonyup Sok**

# Setup the program

## 1. Setup the SQL Server


- Download and setup SQL Server Management Studio (SSMS):

<https://aka.ms/ssmsfullsetup>

- Download and setup Microsoft SQL Server Express:

<https://www.microsoft.com/en-us/sql-server/sql-server-downloads>


Or, download a free specialized edition



**Developer**

SQL Server 2022 Developer is a full-featured free edition, licensed for use as a development and test database in a non-production environment.

[Download now](#)

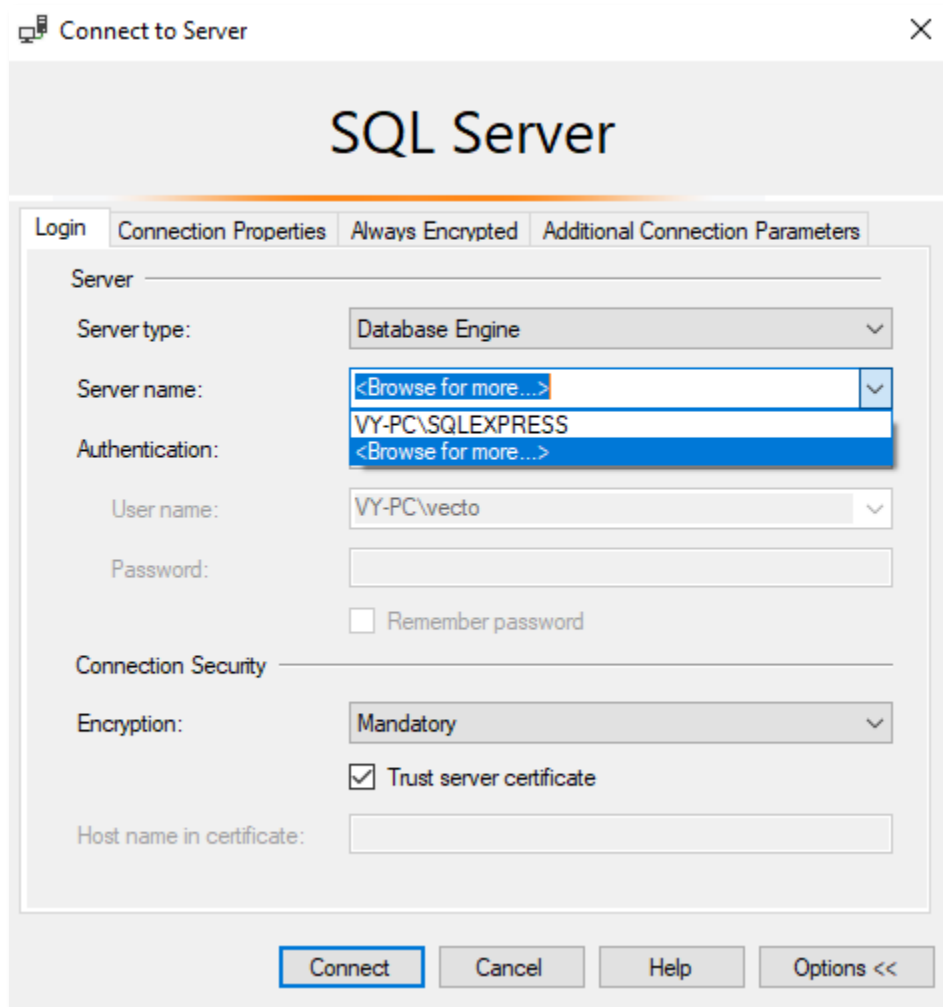


**Express**

SQL Server 2022 Express is a free edition of SQL Server, ideal for development and production for desktop, web, and small server applications.

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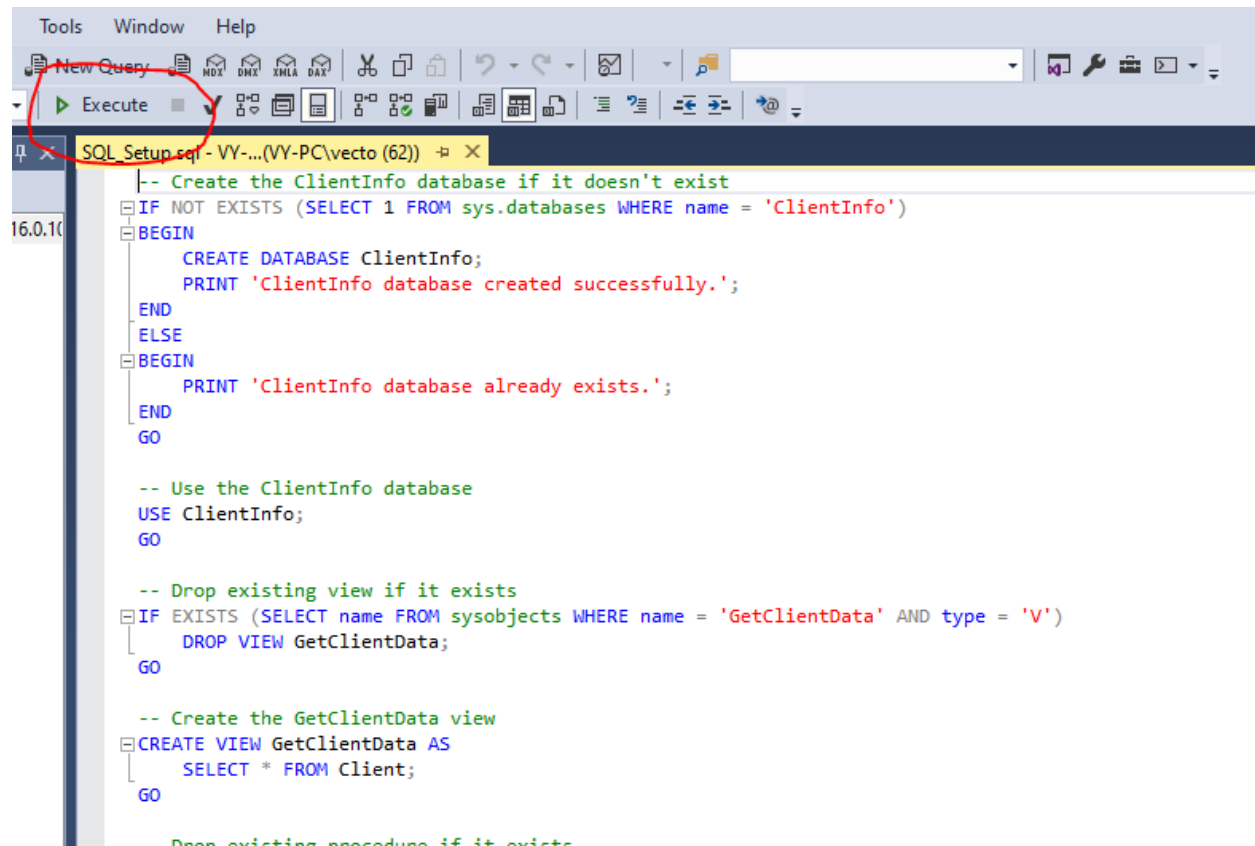
- Connect to your local server on Microsoft SQL Server Management Studio
- Use Browse for more in Server name to find your server's name.



- Open the SQL\_Setup.sql script in the Resources folder of the program.

Name	Date modified	Type	Size
auto_send_email.txt	5/18/2024 10:27 PM	Text Document	1 KB
CMaT_Logo_w_byline.jpg	5/11/2024 6:15 PM	JPG File	38 KB
default_email.txt	5/18/2024 10:27 PM	Text Document	1 KB
email_list.txt	5/18/2024 10:27 PM	Text Document	1 KB
email_log.txt	5/24/2024 5:15 PM	Text Document	1 KB
Picture1.png	5/13/2024 5:04 PM	PNG File	27 KB
SQL_Setup.sql	5/24/2024 6:59 PM	Microsoft SQL Ser...	3 KB

- Use Execute to run the script to create the database.



```
-- Create the ClientInfo database if it doesn't exist
IF NOT EXISTS (SELECT 1 FROM sys.databases WHERE name = 'ClientInfo')
BEGIN
    CREATE DATABASE ClientInfo;
    PRINT 'ClientInfo database created successfully.';
END
ELSE
BEGIN
    PRINT 'ClientInfo database already exists.';
END
GO

-- Use the ClientInfo database
USE ClientInfo;
GO

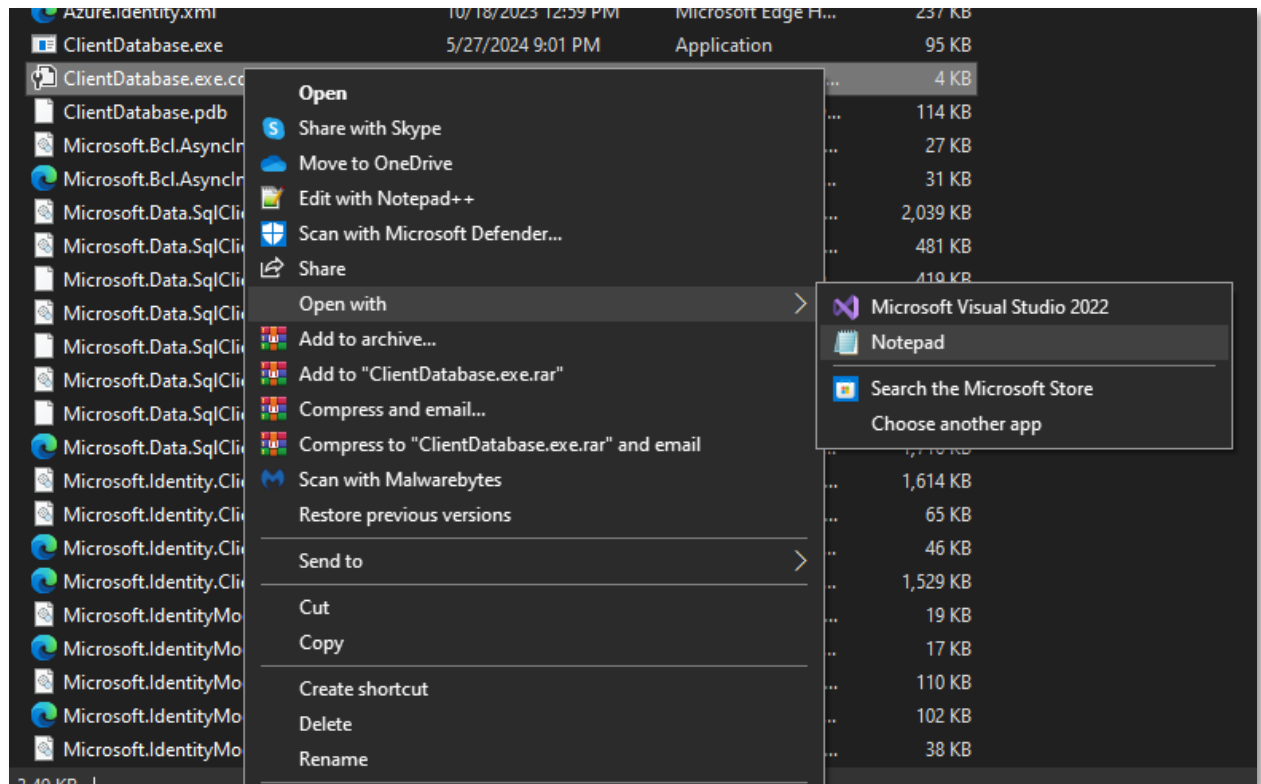
-- Drop existing view if it exists
IF EXISTS (SELECT name FROM sysobjects WHERE name = 'GetClientData' AND type = 'V')
    DROP VIEW GetClientData;
GO

-- Create the GetClientData view
CREATE VIEW GetClientData AS
    SELECT * FROM Client;
GO

-- Drop existing procedure if it exists
```

## 2. Connecting to the SQL server:

- Open the ClientDatabase.exe.config with notepad.

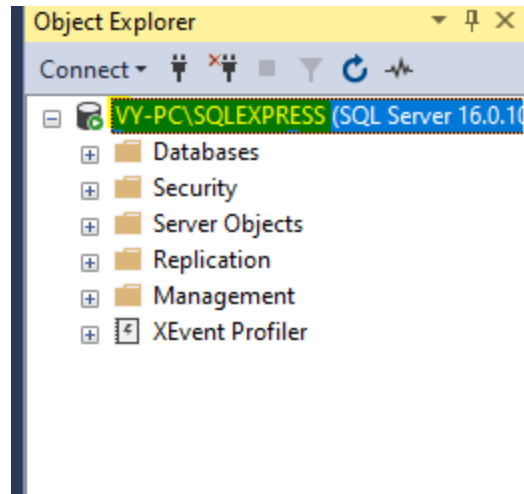


- Replace YOUR-SOURCE with the name of your SQL Server source.

```

*ClientDatabase.exe.config - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <startup>
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.7.2" />
  </startup>
  <connectionStrings>
    <add name="ClientDatabaseConnectionString" connectionString="Data Source=YOUR-SOURCE\SQLEXPRESS;Initial Catalog=ClientInfo;Integrated
Security=True; TrustServerCertificate=True" providerName="System.Data.SqlClient" />
  </connectionStrings>
  <runtime>
    <assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
      <dependentAssembly>

```



### 3. Creating app password for Gmail

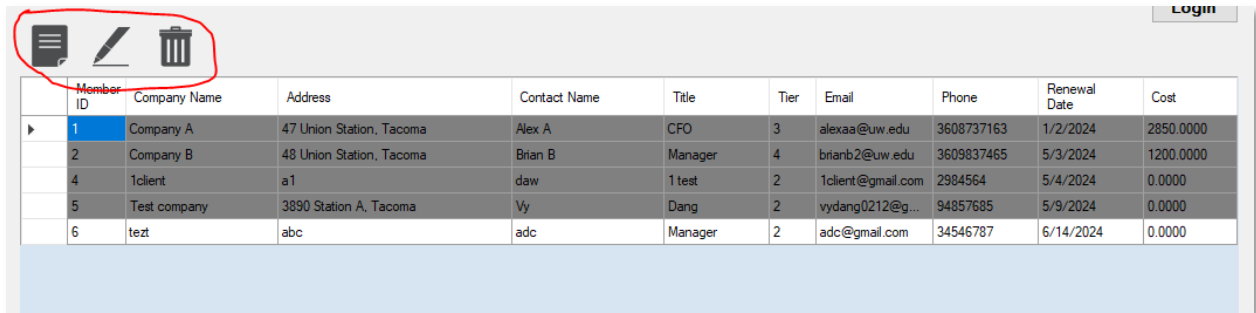
- If you are using Gmail to send email to client, you need to setup an app password to login your email to the program. If not, skip this setup.
- Go to your Google Account.
- Select Security.
- Under "How you sign in to Google," select 2-Step Verification.
- At the bottom of the page, select App passwords.
- Enter a name that helps you remember where you'll use the app password.
- Select Generate.
- To enter the app password, follow the instructions on your screen. The app password is the 16-character code that generates on your device.
- Select Done.



# Program operation

## 1. CRUD functions

- Add, edit, and delete clients with 3 buttons.



	Member ID	Company Name	Address	Contact Name	Title	Tier	Email	Phone	Renewal Date	Cost
▶	1	Company A	47 Union Station, Tacoma	Alex A	CFO	3	alexaa@uw.edu	3608737163	1/2/2024	2850.0000
	2	Company B	48 Union Station, Tacoma	Brian B	Manager	4	brianb2@uw.edu	3609837465	5/3/2024	1200.0000
	4	1client	a1	daw	1 test	2	1client@gmail.com	2984564	5/4/2024	0.0000
	5	Test company	3890 Station A, Tacoma	Vy	Dang	2	vydang0212@g...	94857685	5/9/2024	0.0000
	6	test	abc	adc	Manager	2	adc@gmail.com	34546787	6/14/2024	0.0000

- All the fields except cost, must be filled when adding or editing clients.

Edit Information

Company Name

Company A

Tier

3

Address

47 Union Station, Tacoma

Contact Name

Alex A

Contact Title

CFO

Email

alexaa@uw.edu

Phone

3608737163

Renewal Date

Tuesday , January 2, 2024

Renewal Cost

2850.0000

Done

Cancel

## 2. Searching and sorting functions

- Change the sort's field to display ascending order of that field.

Sort by:

Search by:

Email not logged in

Login

	Company Name	Address	Contact Name	Title	Tier	Email	Phone	Renewal Date	Cost
	Company A	47 Union Station, Tacoma	Alex A	CFO	3	alexaa@uw.edu	3608737163	1/2/2024	2850.0000
	Company B	48 Union Station, Tacoma	Brian B	Manager	4	brianb2@uw.edu	3609837465	5/3/2024	1200.0000
5	Test company	3890 Station A, Tacoma	Vy	Dang	2	vydang0212@g...	94857685	5/9/2024	0.0000
6	test	abc	adc	Manager	2	adc@gmail.com	34546787	6/14/2024	0.0000

- Search field can search through all of the fields that are available in the database.

### 3. Exporting document functions

- Select specific client in the database and press export to generate a Word document of that client renewal date.

### 4. Checking renewal date functions

- It will marked the client **red (5 days till renewal date)**, **green (if 5 days till renewal date and an email has sent)**. And **gray (if it passed the renewal date, no matter if an email has been sent yet)**. Until you update the renewal date of the client by editing, then it will marked the client normal again.
- The program is able to check for client's upcoming renewal date that are 5 days in advance and put them into the alert list.
- Every time it starts, it will check for clients whose renewal date is 5 days left and if leaves open, it will check every 12 hours (12 hours cycle). If the auto-send email function is on, it will send email of that client to the default recipient.
- **Noted that auto-send email only works by cycle.** For example, if a customer's expiration date in the database is changed before the cycle, it will only add that customer to the alarm list and will automatically send an email.
- **Restart the program will reset the cycle.**
- Users can send email about the selected client in the alert list manually. It will then move to the email logs, which show when, which client and whose email it was sent to.

**Renewal Alert:**

	Client ID	Client Name	Renewal Date
▶▶			

Send selected email    Check for renewal date

**Email Logs:**

	Log Entry
▶	5/18/2024 10:31:14 PM: Email of Client ID 4 was sent to vydang0212@gmail.com
	5/18/2024 10:27:50 PM: Email of Client ID 2 was sent to vydang0212@gmail.com (Default)
	5/18/2024 10:31:16 PM: Email of Client ID 4 was sent to vydang0212@gmail.com
	5/18/2024 10:54:42 PM: Email of Client ID 1 was sent to vydang0212@gmail.com
	5/18/2024 10:54:50 PM: Email of Client ID 2 was sent to vydang0212@gmail.com
	5/18/2024 10:54:58 PM: Email of Client ID 4 was sent to vydang0212@gmail.com
	5/18/2024 10:55:06 PM: Email of Client ID 5 was sent to vydang0212@gmail.com

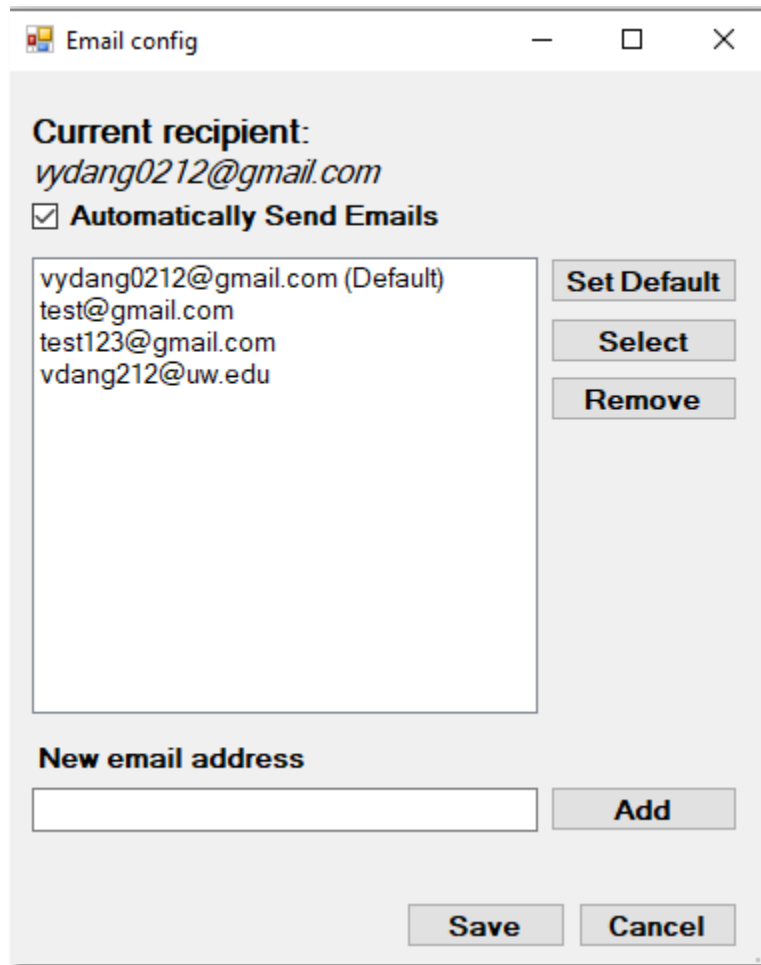
Clear selected email    Clear old emails

Close

- Logs can be cleared one by one with “Clear selected email” button or can clear logs which are 2 months old with “Clear old emails” button.

## 5. Managing email functions

- Auto send email can be enabled with the tick box. If this is on, it will ask the user to login their email first before doing anything to prevent errors if it can't send email automatically. Users can bypass this by clicking cancel but it is recommended to double check the renewal alert table.



- Set default option allow the program to remember the recipient email every time it boots up.
- Users can use the Select button to select different current recipient to send email to. Keep in mind that the program will change it back to default when restart.
- Users can add or remove recipients in the list.
- All action must be saved before closing the window, otherwise nothing will change.

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