



Edward Charles
FOUNDATION



Project Brief

- Edward Charles Foundation, based in California, USA, is an independently audited, IRS-approved 501(c)(3) tax-exempt organization classified as a public charity. The foundation operates fiscal sponsor and donor-advised funds, handling all compliance, fiscal, and fiduciary obligations. It educates clients on different fund types and manages financial reporting using the Xero API, supported by a robust backend and front-end system.

Key Challenges

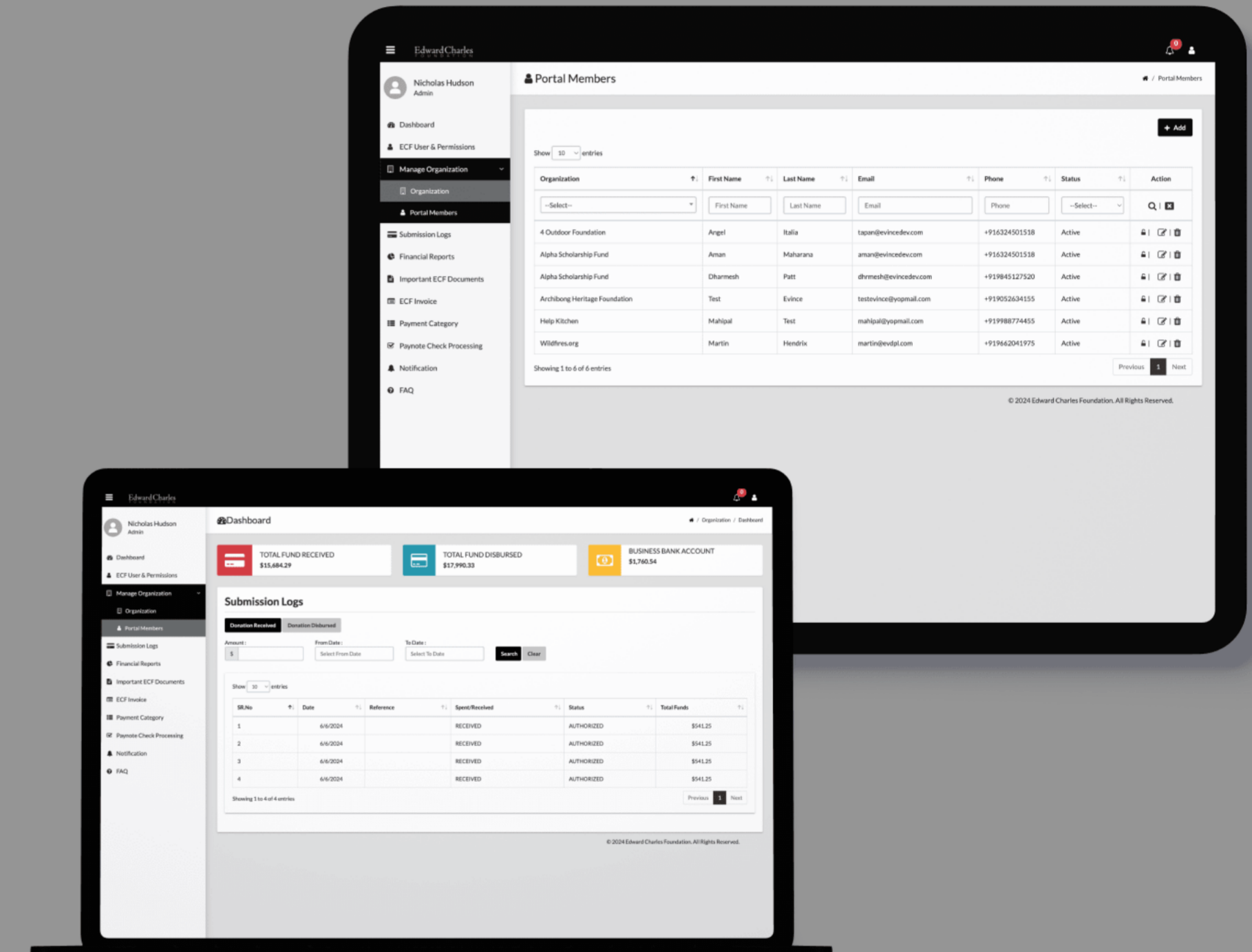
- Handling all compliance obligations for fiscal sponsor and donor-advised funds.
- Generating accurate and comprehensive financial reports.
- Developing a dashboard to display account balances and donations.
- Creating single PDF documents by merging multiple file formats.
- Facilitating user-friendly disbursement request submissions.
- Implementing secure authentication using Twilio SMS.
- Tracking and displaying all payment requests and attached documents.
- Extracting data from Paynote buck checks API to create invoices.
- Developing a library to merge different document types into a single PDF.
- Providing downloadable monthly financial reports for users.

Solution Delivered

- Automated handling of all compliance obligations.
- Seamless generation of financial reports using Xero API.
- Created a comprehensive financial snapshot dashboard.
- Developed a custom library for document merging.
- User-friendly disbursement request forms with W9 and invoice attachment.
- Two-factor authentication using Twilio SMS.
- Detailed logs of all submitted payment requests.
- Automated invoice creation from Paynote buck checks data.
- Merged various document formats into a single PDF.
- Enabled users to download monthly financial reports.

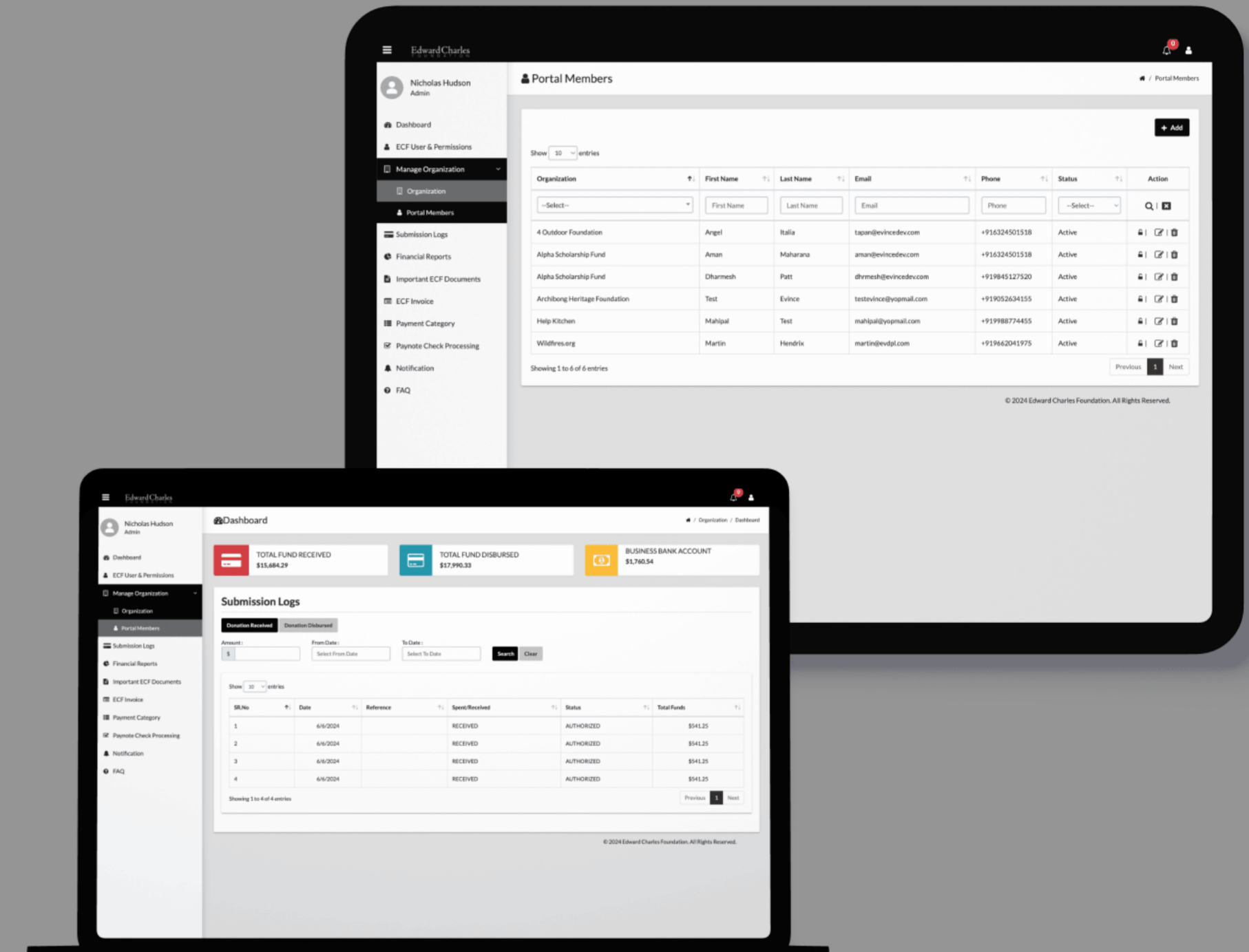
Highlighted Features

- **Compliance Management:** Automated compliance handling for all fund types.
- **Financial Snapshot:** Dashboard showing account balances and donation totals.
- **Document Merge Tool:** Library for merging different file formats into one PDF.
- **Disbursement Requests:** Forms for submitting disbursement requests with required documents.
- **Two-Factor Authentication:** Secure login via Twilio SMS service.
- **Payment Logs:** Detailed tracking of payment requests and documents.
- **Invoice Generation:** Creating invoices from extracted Paynote buck checks data.
- **Monthly Reports:** Users can view and download monthly financial reports.



Highlighted Features

- **User Dashboard:** Comprehensive dashboard for financial and policy details.
- **Custom PDF Library:** Created using LibreOffice command line for document merging.





Mark David
Organization Name

Financial Snapshot



Current Bank Balance

\$25,000.00

Current Month

Total Donations

\$15,000.00

Online Donations

\$15,000.00

Current Year

Total Donations

\$15,000.00

Online Donations

\$15,000.00

Since Inception

Total Donations

\$15,000.00

Online Donations

\$15,000.00

Financial Snapshot

Recent Transactions

Make a Payment

Payment Logs

Financial Reports

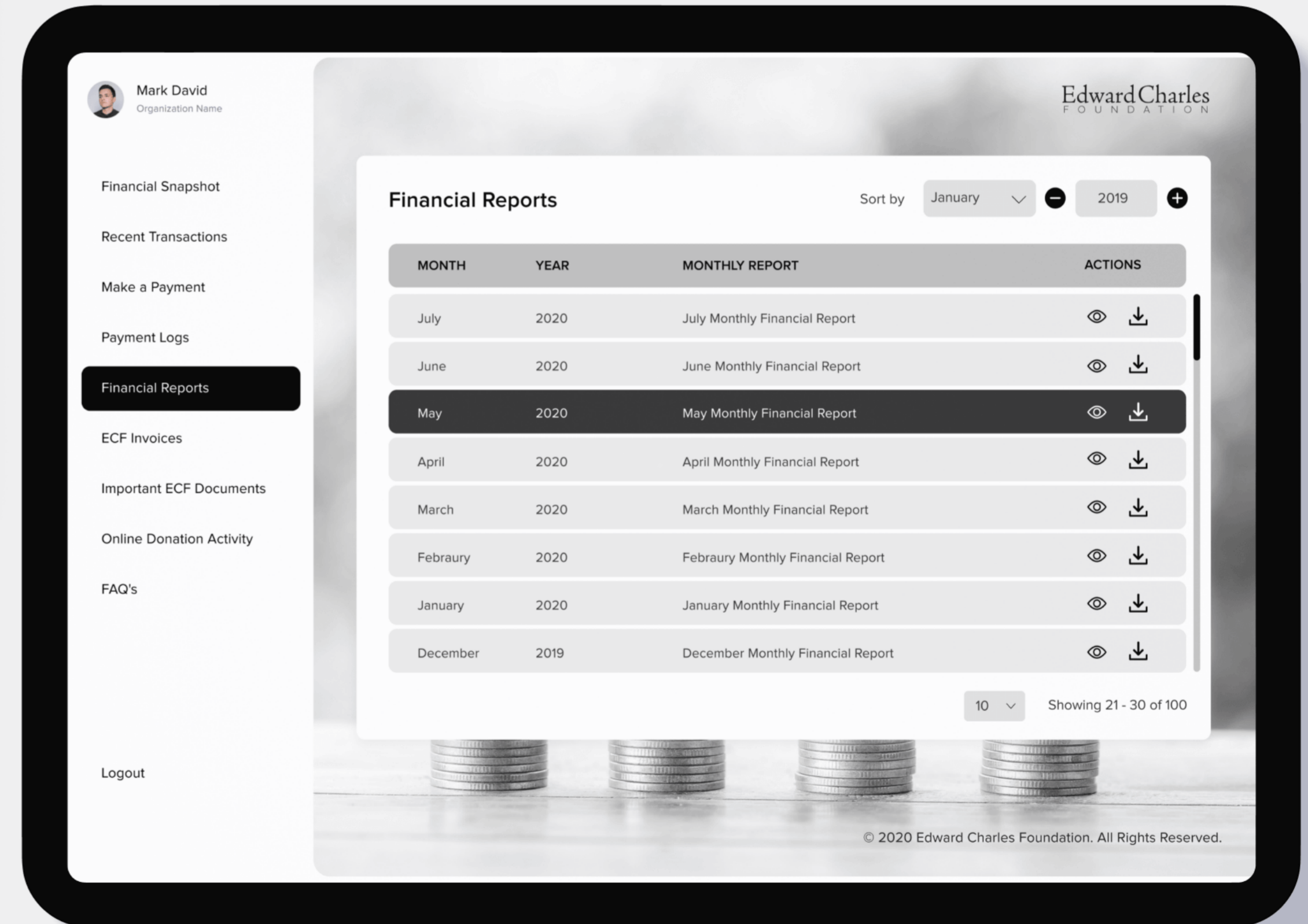
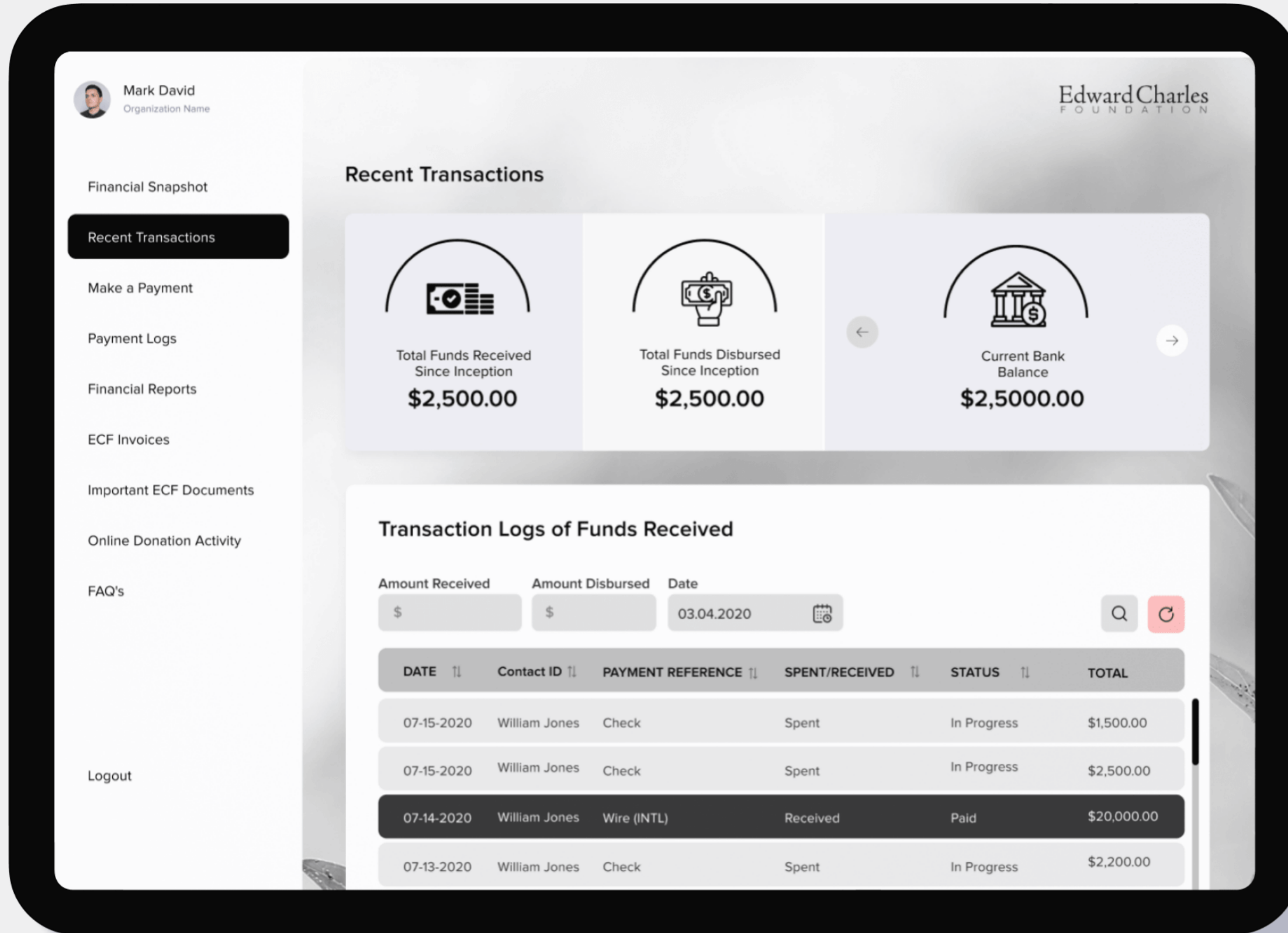
ECF Invoices

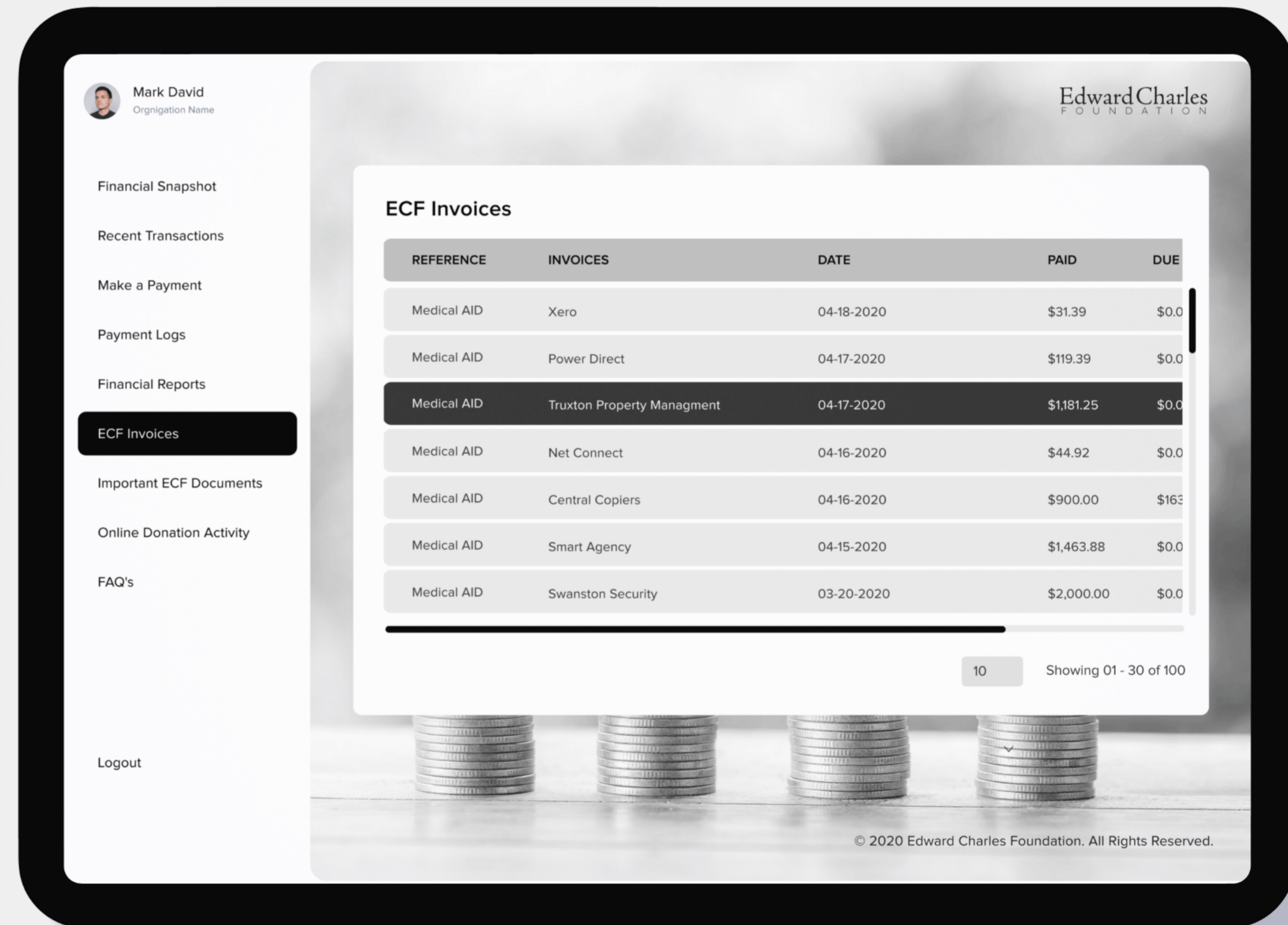
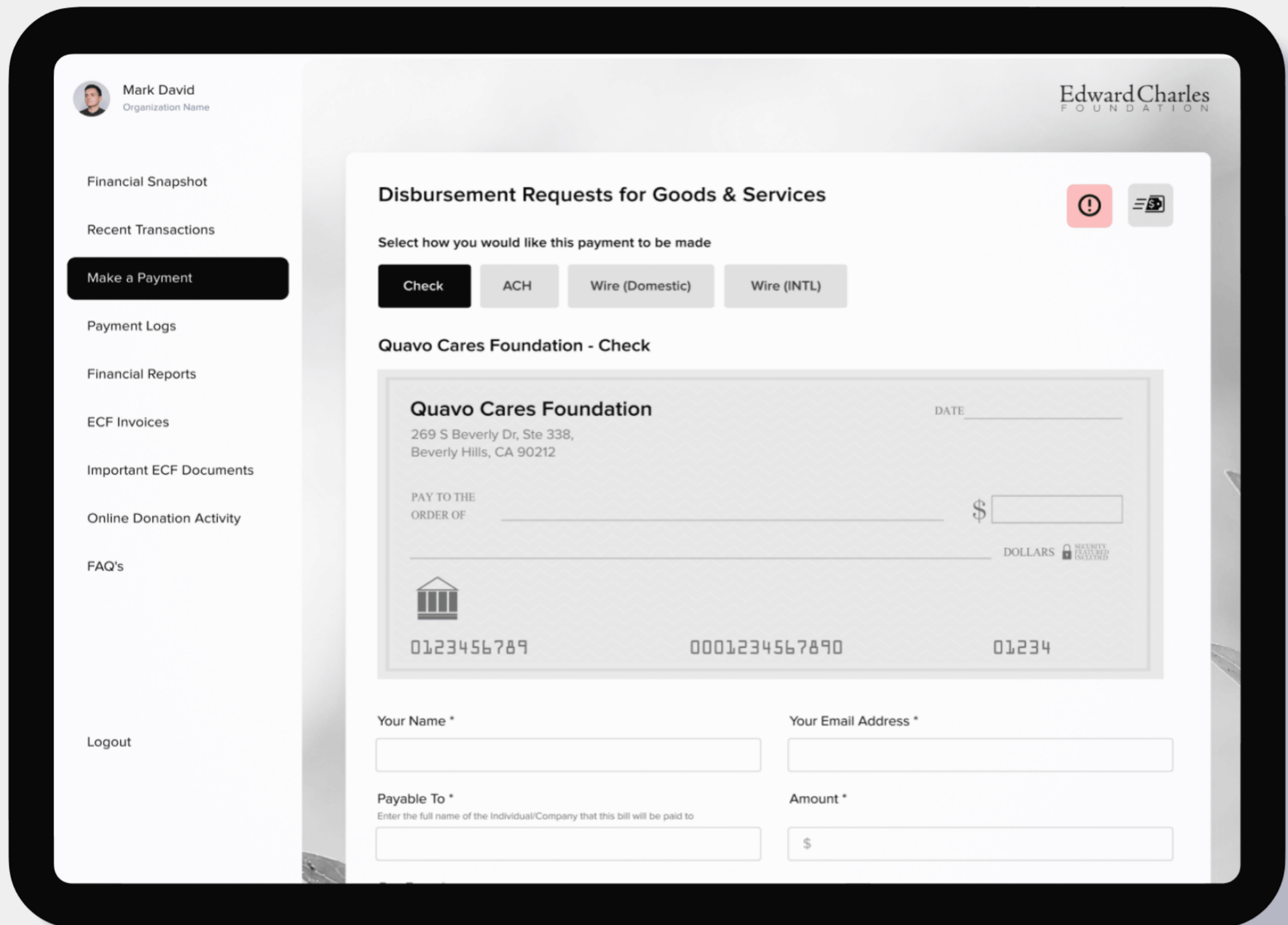
Important ECF Documents

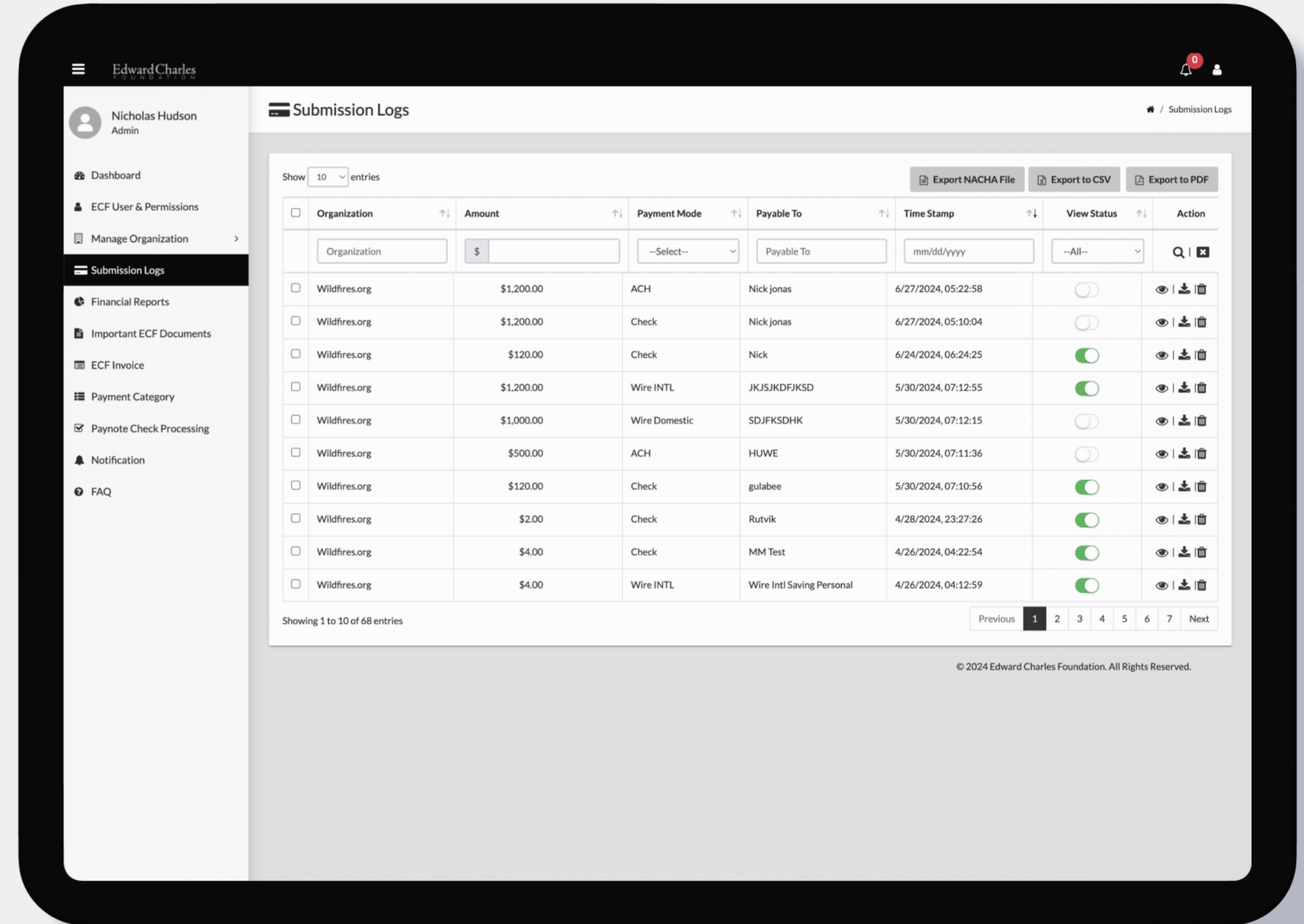
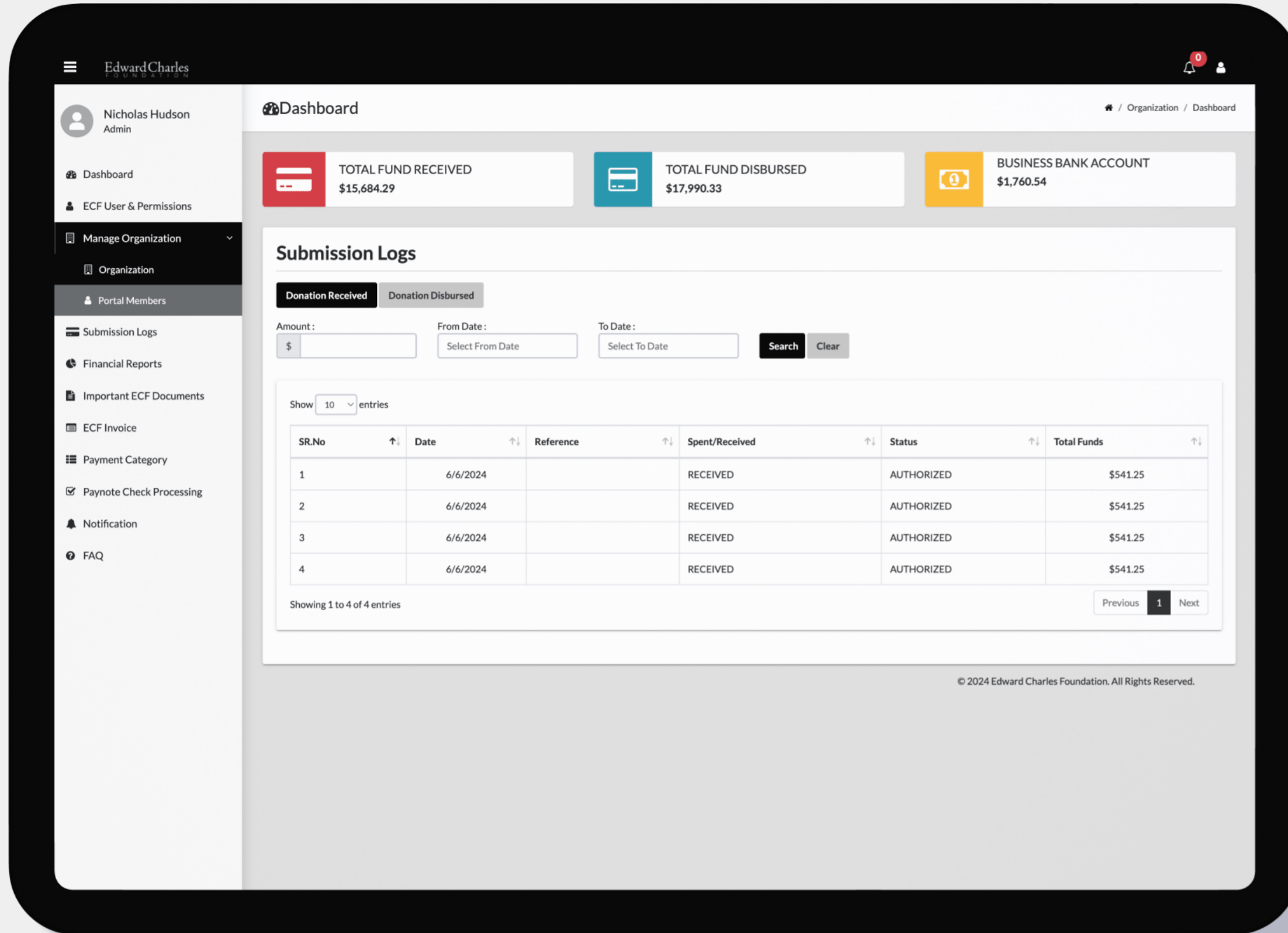
Online Donation Activity

FAQ's

Logout







Edward Charles

Nicholas Hudson Admin

ECF Invoice

Automate Invoices Add

Show 10 entries

Organization	Invoice Title/Reference#	Invoice Date	Amount	Status	Action
--Select--	Invoice Title/Reference#	mm/dd/yyyy	Amount	--Select--	Q X
4 Outdoor Foundation	INV-0899	7/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
4 Outdoor Foundation	Bill Pay - June 2022	5/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
4 Outdoor Foundation	INV-0899	7/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
4 Outdoor Foundation	test - 07/12/2022	5/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Alpha Scholarship Fund	INV-0921	7/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Alpha Scholarship Fund	test - 07/12/2022	5/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Alpha Scholarship Fund	INV-0921	7/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Alpha Scholarship Fund	Bill Pay - June 2022	5/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Archibong Heritage Foundation	Bill Pay - June 2022	5/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️
Archibong Heritage Foundation	INV-0852	7/1/2022	\$950.00	Active	👁️ 👤 📄 🗑️

Showing 1 to 10 of 40 entries

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Payment Category

Add

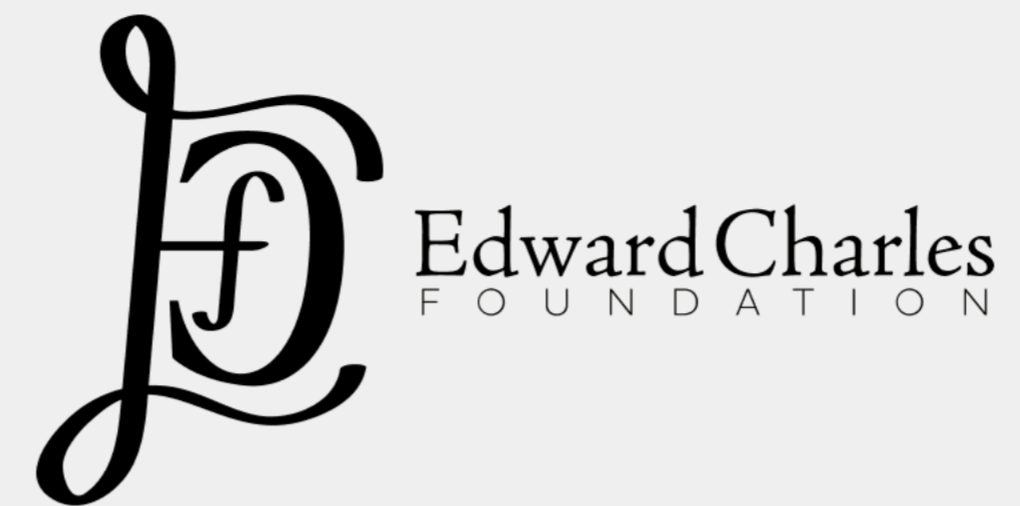
Show 10 entries

Category Name	Organization	Status	Action
Category Name	--Select--	--Select--	Q X
Licenses & Fees		Active	📄 🗑️
Event Expenses - Consultants		Active	📄 🗑️
Technology		Active	📄 🗑️
Legal		Active	📄 🗑️
Awareness Event - Supplies/Equipment		Active	📄 🗑️
Event Expenses		Active	📄 🗑️
Grants & Charitable Gifts		Active	📄 🗑️
Rent		Active	📄 🗑️
Insurance		Active	📄 🗑️
Event Expenses - Rentals		Active	📄 🗑️

Showing 1 to 10 of 21 entries

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Technology Overview

- **Web Framework**
.NET Core
- **Programming Language**
C#
- **Design Tool**
Figma
- **UI Framework**
Bootstrap
- **Database**
MySQL
- **Industry Domain**
FinTech

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