**DETAIL EXPLANATION OF WILL APPLICATION REQUIREMENTS**

**1.0 Background**

Will application is an application for creating and managing Will online using multi-step forms and user accounts. The application will allow services to be provided to individuals and business clients. There will be functionalities that allow sales people to sell Will using voucher codes and accrue commission within the application. The product will be provided via the website and using Android/iOS mobile applications. The development of the application will be based on the detail requirements as stated below.

**2.0 Users**

Users on the website are people with login accounts within the system. For efficiency, users will be managed within one table using User Types. There will be 5 different user types within the system:

* Admin – Admin is the main user that will come with the system. Admin will have the power to create Organisation users
* Organisation Users – These are users that will be created by Admin using “Create Organisation Users” functionalities. Organisation users will be give similar functionalities as the Admin except the “Create Organisation Users” feature.
* Individual Users – Individual users are users that can create Will, Codicil and other transactions on the system. Individual Users can only be created on the website. They CANNOT be created or managed by the Admin
* B2B Clients – B2B Clients are organisation users. B2B Client can only generate and manage vouchers. They will not have the functionality to create Will. B2B Clients Users can only be created on the website. B2B Client can be deactivated by the Admin using “Manage B2B/Ambassador Account”
* Will Ambassadors – These users are sales people with a have functionality to download flyers and accrue commission when their unique code is used to purchase Will or make payment by Individual users. Will Ambassador can only be created on the website. Will Ambassadors can be deactivated by the Admin using “Manage B2B/Ambassador Account”

**User Table Fields**

* User ID
* User Type
* User Email
* User Password
* Selfie Image
* User Phone Number
* User Address 1
* User Address 2
* User Town
* User Country
* User Status

**3.0 Products**

Products are services provided on the application. Products will have prices, which determine how much should be paid for them before applying discount/voucher. Product prices will be stored and managed in the Product Table of the database.

Current Products are:

* Will Creation
* Codicil Creation
* Basic Will and Will Documents Registration
* Basic Will Search (Form)
* Executor Will Copy Request (Form)
* Probate Registry Will Copy Request (Form)

**Product Table Fields**

* Product ID
* Product Base Price

**4.0 PDF Flyer**

PDF Flyer feature is used by Organisation User/Admin to upload, and Will Ambassador to download PDF Flyers.

|  |  |
| --- | --- |
| Organisation User/Admin | Create Flyer |
| Will Ambassador | Download Flyer |

**PDF Flyer Fields**

* Flyer ID
* Flyer Type (B2B or Individual)
* Flyer Name
* Flyer Image
* Flyer Description
* Upload Image

**4.1 Manage PDF Flyer**

Manage PDF Flyer is used by Organisation User/Admin to upload and remove PDF Flyer from the system.

Steps are:

* Organisation User/Admin clicks the Manage PDF Flyer link. This opens the PDF Upload page Organisation User/Admin completes the fields on PDF Upload page and upload the PDF

**PDF Upload Page Form**

* Flyer Name
* Flyer Image
* Flyer Description
* Upload Image
* Submit button

**4.2 Download PDF Flyer**

Download Flyer is used by Will Ambassador Flyer to download PDF flyers that have been uploaded by Organisation Users and Admin.

Steps are:

* Will Ambassador Users click on Download Flyer link. This will open the Flyer listing page
* Will Ambassador select a flyer from the list and print or email. The Flyer generated will have the voucher code of the login Will Ambassador

**Flyer Listing Page**

This is just a viewing page with the following fields

* Flyer Name
* Flyer Image
* Email Flyer button
* Download button

**5.0 Balance**

Balance is the commission accrued by the Will Ambassador when someone uses the Ambassador Voucher code to purchase a will on the platform. The amount that accrues per transaction will be based on the percentage of discount setup for the Will Ambassadors. Each Ambassador will only see the commission relating to the login account. There will be a button - “Withdraw Commission Balance” - if when clicked, will ask from the login Ambassador the bank details that should be used for payment. Balance will reverse to Zero and payment status of existing commission will change to “Pending Payment” after the bottom is clicked. At this stage, only be Organisation user/Admin from their accounts can change the status manually to “Paid”.

|  |  |  |  |
| --- | --- | --- | --- |
| System | Create Commission from Sales and add to Create Balance | Change Commission Balance to Zero and Status to Pending Payment |  |
| Will Ambassadors | Generate Balance Request |  |  |
| Organisation User/Admin |  |  | Change Status to Paid |

**Commission Table Fields**

* Commission Id (PK)
* Commission Date
* Sales Id (FK)
* User ID (FK)
* Balance Request ID (FK)
* Commission Earned
* Commission Balance
* Commission Status

**Balance Request Table Fields**

* Balance Request ID
* Balance Request Date
* User ID (FK)
* Balance Request Status

**5.1 Request Balance Withdrawal**

Request Balance Withdrawal will be used by Will Ambassador User to request for the payment of the commission they have accrued

Steps are:

* Will Ambassador click Generate Balance link. This is opens Commission Listing Page
* Will Ambassador clicks Generate Balance button.
* System will change the status to Pending Payment and Commission Balance to Zero
* Systems Request “Bank Account Name”, “Bank Name” and “Bank Account Number” on a Pop-Up that will be used to pay.

**Commission Listing Page**

* Sales Number
* Product Name
* Individual Name
* Commission Earned
* Commission Balance
* Commission Status
* Generate Balance Withdrawal button

**5.2 Manage Will Ambassador Withdrawal**

Manage Will Ambassador Balance Request is used by the Organisation User/Admin to change the status of Balance Request from “Pending Payment” to “Paid”

Steps are:

* Organisation User/Admin clicks Manage Will Ambassador Balance Request. This open Manage Balance Request page
* Organisation User/Admin changes the Commission Status dropdown from “Pending Payment” to “Paid”

**Manage Balance Request Page**

* Balance Request Date
* User Name
* Commission Balance
* Balance Request Status dropdown

**6.0 Employee Voucher**

Employee voucher are randomly generated voucher codes from the system that can be used to reduce the price or make payment when users are creating Will or paying for other transactions. Employee voucher codes are generated against for B2B Client user account, and one voucher code will only belong to a B2B Client(one to one relationship)

|  |  |  |
| --- | --- | --- |
| B2B Client | Generate Employee Voucher |  |
| System | Create Employee Voucher | Update Employee Voucher Status from “Not Used” to Used |
| Individual User | Use Employee Voucher with Payment |  |

**Voucher Table**

* Voucher ID
* Voucher Date
* User ID (FK)
* Discount ID (FK)
* Voucher Code
* Voucher Status
* Payment Number
* Generated User

**6.1 Generate Employee Voucher**

Generate Employee Voucher is used by B2B Client or Organisation User/Admin to generate voucher codes within the system. The number of vouchers generated will be based on the number selected when generating the vouchers. Payment will be made if the voucher is generated by a B2B Client. Payment is not required if voucher codes are generated by the Organisation User/Admin. Instead Payment Id will be required before the voucher codes are created.

Steps for B2B Client:

* B2B Client clicks Generate Employee Voucher link. This opens Employee Voucher Listing page.
* B2B Client clicks “Generate Employee Voucher” button. This Opens Employee Voucher page
* B2B Client completes Employee Voucher page and clicks Checkout button for payment

**Employee Voucher Listing Page for B2B Client**

* Voucher Date
* Voucher Code
* Voucher Status
* Invoice ID
* Email Voucher Button
* Print Voucher Button
* View Invoice

**Employee Voucher Pop Page for B2B Client**

* Enter Quantity field
* Promotion Code
* Calculate Amount Button
* Checkout Button to Payment

Steps for Organisation User/Admin:

* Organisation User/Admin clicks Generate Employee Voucher link. This opens Employee Voucher Listing page.
* Organisation User/Admin clicks “Generate Employee Voucher” button. This Opens Employee Voucher page
* Organisation User/Admin completes Employee Voucher page and enter Payment ID field and checkout (No Payment Care Needed)

**Employee Voucher Listing Page for Organisation User/Admin**

* B2B Client User Name
* Voucher Date
* Voucher Code
* Voucher Status
* Invoice ID
* Promotion Code
* Processed By Name
* Email Voucher Button
* Print Voucher Button
* View Invoice

**Generate Employee Voucher Invoice Creation Page for Organisation User/Admin**

* B2B Client Name (Dropdown)
* Enter Quantity field
* Enter Promotion Code
* Calculate Amount Button
* Complete button

**Employee Voucher Invoice Listing page**

* Invoice Number
* Invoice Date
* B2B Client Name
* Number of Voucher
* Invoice Amount
* Invoice Source (Internal/External)
* Processed By Name
* Invoice Status (UnPaid/Paid)
* Generate Employee Voucher button (Only for Internal Source)
* View Invoice button
* Email Invoice button

**Generate Employee Voucher button**

This should open up a pop page for entering the Payment ID. Employee vouchers will be generated and will be added to the vouchers on the Employee Voucher Listing Page

**7.0 Discount**

Discount is used to setup discount percentage against Employee Voucher and Will Ambassador Code

**Discount Table Fields**

* Discount Id
* Discount Type (Employee Voucher/Will Ambassador)
* From Number Quantity
* To Number Quantity
* Discount Percentage

**7. 1 Setup Discount**

Setup Discount is used by Organisation User/Admin to setup the discount that will be used with Employee voucher codes or code that will be created for each Will Ambassador. The discount percentage setup here will be linked to Employee Vouchers based on the number entered when the voucher is created. I am suggesting just 3 price brackets should be designed for the discount setup

Steps are:

* Organisation User/Admin clicks Setup Discount link. This creates Setup Discount Code
* Organisation User/Admin complete the Setup Discount page with the amount and discount percentage

**Setup Discount Page**

* Discount Id
* Discount Type (Employee Voucher/Will Ambassador/Will Ambassador B2B/Organisation User B2B/Organisation User)
* From Number Quantity
* To Number Quantity
* Discount Percentage
* Commission Percentage
* Submit button

**8.0 Will**

Will is one of the products within the application. It is the main product. Will creation will be through multi-step form with PDF document is generated at the end. Will created will be AUTOMATICALLY REGISTERED like Registered Will with the created PDF attached. A user account will be created and email with the PDF attached will be sent out. There will only be one active Will for a particular user as every point in time. This will usually be the latest one created. Will can only be created by Individual users with card payment/discount or using Employee voucher codes.

**9.0 Basic Will Registration**

Basic Will Registration is the logging of Will record by Individual users through completion of form on the website BUT without creating a PDF of the Will. This is because creating of PDF is only available from Will Creation. Anyone creating Basic Will Registration will be required to register on the application if the person has not done so. Basic Will Registration is stored on the website in the same table as Will created from Will Creation. The only difference should be Will created from Will Creation will have “Created Will PDF field” and functionalities not available with ordinary Registered Will. Basic Will Registration can be associated with Will Documents on one to many relationships - same as Will Creation.

Steps are:

**Basic Will Registration Form**

* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Promotion Code
* Requester Selfie Image
* Will Owner Title
* Will Owner First Name
* Will Owner Middle Name
* Will Owner Surname
* Will Owner Date of Birth
* Will Owner Gender
* Will Owner Address Line 1
* Will Owner Address Line 2
* Will Owner City
* Will Owner Country
* Will Owner United Kingdom
* Will Owner Postcode
* Date of Will
* Address Where Will Is Stored
* Will Storage Reference Number
* Will Type
* Created By Firm
* Will Reference Number
* Additional Instruction
* How Often Do You Want to Be Reminded By this Will?
* Upload Will Sample Image
* Submit button (A pop message that the will owner will be notified of the change. This leads to checkout and payment)

**Register Will Listing Page**

* Date Created
* Date of Will
* Will Status
* Will Owner Title
* Will Owner First Name
* Will Owner Middle Name
* Will Owner Surname
* Add Document to Will button
* View Detail Button
* View Will PDF (For Created Will Only)
* Create Codicil (Only for Active Will)

**Register Will Table**

* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Promotion Code
* Requester Selfie Image
* Will Owner Title
* Will Owner First Name
* Will Owner Middle Name
* Will Owner Surname
* Will Owner Date of Birth
* Will Owner Gender
* Will Owner Address Line 1
* Will Owner Address Line 2
* Will Owner City
* Will Owner Country
* Will Owner United Kingdom
* Will Owner Postcode
* Executor Name
* Executor Email Address
* Executor Phone Number
* Executor Address Line 1
* Executor Address Line 2
* Executor City
* Executor Country
* Will Source (External/Internal)
* Date of Will
* Created By Firm
* Will Reference Number
* Address Where Will Is Stored
* Will Storage Reference Number
* Additional Instruction
* Will Reminder Frequency
* Last Reminder Date
* Next Reminder Date
* Created Will PDF File
* Discount Code Applied
* Discount Amount Taken

**10.0 Register Will Supporting Documentation**

Register Documents are any document that can be used to support Will. Register Document will be created by Individual Users from their login accounts through a form that will be available when “Register Document” is clicked. Register Document will have many to one relationship with an Active Will.

**Register Document Table Fields**

* Register Document ID
* Active Will ID (FK)
* Register Document Date
* Register Document Name
* Register Document Type
* Register Document Number
* Register Document Issuer
* Register Document Description
* Register Document Location

**10.1 Create Register Document**

**Register Document Listing Page**

* Register Document Date
* Register Document Name
* Register Document Issuer
* Register Document Type
* Register Document Number
* Register Document Description
* Create New Document button
* Edit Document button
* View Document Details button
* Remove Document button

**Create New Document Page**

* Register Document Date
* Register Document Name
* Register Document Issuer
* Register Document Type
* Register Document Number
* Register Document Description
* Register Document Location
* Submit button

**11.0 Codicil**

Codicil is a document that is used to make slight changes to an active Will. Codicil is used where the whole Will document does not need to be changed. Codicil will be linked ONLY to the Will that was Active when it is created. When a new Will is created after a Codicil, the Codicil will become “Inactive”. This means Codicil cannot be linked to a Will that has a later creation date. Codicil is going to be created like Will using multi-step forms that generate PDF in the end

**12.0 Basic Will Search**

Basic Will Search is a product that uses Search form on the website to check information that are stored against the Will Table on the database. Basic Will Search does not require the user to create an account or logged in before it can be used. However, payment will need to be made before the search is carried out

Steps are:

* Users click Basic Search link on the website
* User completes Basic Search form on the website and checkout to make payment

**Basic Will Search Form**

* Do you have will Registration Number?
* If Yes, Will Registration Number
* If No, Name of Will Owner
  + Will Owner Phone Number
  + Will Owner DOB
* Relationship With Will Owner
* Reasons for Search
* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Promotion Code
* Requester Selfie Image
* Search Button (A pop message that the will owner will be notified of the change. This leads to checkout and payment)

**Basic Will Search Table**

* Search ID
* Sear Date and Time Log
* Payment Status
* Ambassador Code ID (FK)
* Discount Amount Applied
* Amount Paid
* Matched to Will Owner ID (FK)
* Will Registration Number
* Name of Will Owner
* Will Owner Phone Number
* Will Owner DOB
* Relationship With Will Owner
* Reasons for Search
* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Promotion Code
* Requester Selfie Image

**13.0 Executor Will Copy Request**

Executor Will Copy Request is a form on the website that is used by an external user to request for copies of Active Will, Will Documents and any Codicil that is linked to the Will. All the document and information will be sent by an email or post to the physical address to the email address that is stored as “Executor Email Address” on the Will record after payment is made by the external user. There will be no register or login to use this request.

**Executor Will Copy Request Form**

* Do you have will Registration Number?
* If Yes, Will Registration Number
* If No, Name of Will Owner
  + Will Owner Phone Number
  + Will Owner DOB
* Executor Name
* Executor Email Address
* Executor Phone Number
* Relationship With Will Owner
* Reasons for Request
* Promotional Code
* Requester Selfie Image
* Submit button (This takes the user to check to make payment. Notification is sent to Executor and Will Owner)

**Executor Will Copy Request Table**

* Executor Will Request ID
* Executor Will Request Date
* Match Will ID (FK)
* Sent to Email Address
* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Promotional Code
* Discount Amount Applied
* Amount Paid
* Requester Selfie Image

**14.0 Probate Registry Will Copy Request**

Probate Registry Request is a form on the website that is used by an external user to request for copies of Active Will and any Codicil linked to the Will. Unlike “Executor Will Copy Request”, Probate Registry Wlll Copy Request will not produce any Registered Document linked to the Will as OUTPUT. The documents generated by Probate Registry Will Copy Request will not be emailed but it will be posted to the address of the Probate Registry entered by the external user. There is no register or login to use this request.

**Probate Registry Will Copy Request Form**

* Do you have will Registration Number?
* If Yes, Will Registration Number
* If No, Name of Will Owner
  + Will Owner Phone Number
  + Will Owner DOB
* Relationship With Will Owner
* Reasons for Request
* Promotional Code
* Requester Selfie Image
* Submit button (This takes the user to check to make payment. Notification is sent to Will Owner)

**Probate Registry Will Copy Request Table**

* Probate Registry Will Request ID
* Probate Registry Will Request Date
* Match Will ID (FK)
* Sent Probate Registry Address
* Requester Title
* Requester First Name
* Requester Middle Name
* Requester Last Name
* Requester Address
* Requester Email
* Requester Phone Number
* Requester Address Line 1
* Requester Address Line 2
* Requester Town
* Requester Country
* Requester Post Code
* Requester Selfie Image
* Promotional Code
* Discount Amount Applied
* Amount Paid