FINFO Functional Specification

1- **Server requirement**
   a. Apache
   b. PHP >= 5.4
   c. Mcrypt PHP Extension
   d. OpenSSL PHP Extension
   e. Mbstring PHP Extension
   f. Tokenizer PHP Extension
   g. MySQL >= 5.5

2- **Framework and Library**
   a. Laravel 5.1
   b. Bootstrap 3.3 (responsive)
   c. jQuery 1.11.3

3- **Modules Deliverables**
   a. Front End – FINFO Public Website
       i. Home page, about us, contact us and so on (Dynamic pages)
       ii. Registration
       iii. Package selection / Multiple currencies
       iv. Check out and Payment gateway
       v. Login page for FINFO admin or editor
   b. Front End – Client Public Website
       i. Home page and other dynamic pages
       ii. Login page
       iii. Forgot password
   c. Back End – FINFO
       i. Dashboard
       ii. User Management
       iii. Dynamic page and subpage
       iv. Client list and detail
       v. Billing
       vi. Automated invoice generation
       vii. Revenue/Profit
   d. Back End - Client
       i. Dashboard
       ii. Website update (CMS)
       iii. User profile/ account information
       iv. Setting
       v. User Manager
       vi. List of Modules subscribed to/ history
       vii. My Invoices
       viii. Payment Gateway option
       ix. Ability to upgrade package

       x.   Aibility to unsubscribe to package
- e. Package features
  - i. Latest Financial Highlight
  - ii. Real time stock pricing and charts
  - iii. Financial annual report
  - iv. Press Release
  - v. Financial Results
  - vi. Webcast
  - vii. Presentations
  - viii. Announcements
  - ix. Investor Relations Calendar
  - x. Broadcast
  - xi. Email Alerts
  - xii. Newsletter
  - xiii. Media Access

4- Functional specifications for each module
- **a. Front End – FINFO Public Website**
  - i. Home page, about us, contact us and so on (Dynamic pages)

Footnote	Item Name	Notes
1	Layout Template	Will be responsive through phone and tablet.
2	Menu	There will be main menu and submenu
3	Content	Will be dynamic according to database

    ii. Package selection / Multiple currencies

Footnote	Item Name	Notes
1	Package selection	There will be 3 packages for user to choose. (Bronze, Silver, Gold)
2	Package detail	Package detail will be generated from DB or config file.
3	Package click	When clicked, user will be routed to registration page with selected package.

→ Field of Package

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	package_name	radio	Yes	1	1	select at least one package/required
2	package_desc	text	No	0	200	

    iii. Registration

Footnote	Item Name	Notes
1	Package selection	This show display the package selected by user.
2	Account name	This will be an unique subdomain automatically creation (eg. account-name.finfo.com).
3	Fields	Check below
4	After completed	User will be routed to checkout and payment page after register completed.

→ Field of Register

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_ name	text	Yes	6	20	check if account user is not exist/required
2	package_name	radio	Yes	1	1	check at least one package selected/required
3	sex	dropdown	Yes	1	1	required
4	first_name	text	Yes	5	50	required
5	last_name	text	Yes	5	50	required
6	emai_address	email	Yes	5	50	required/valid email/unique
7	password	password	Yes	6	15	check if password meet the min
8	confirm_password	password	Yes	6	15	check if password meet the min and match the password field
9	term and condition	checkbox	Yes	1	1	check if user has checked the term and condition

iv. Check out and Payment gateway

Footnote	Item Name	Notes
1	Check out page	Field: check below
2	Payment gateway	Third party or APIs will be provided by Wizwerx
3	After completed	User will be routed to thanks you page and message to check email for account verifcation
4	Account email verification	Will be sent after user complement registration with a link to verify.
5	After account verified	User will be routed to login page on user subdomain.
6	Invoice email notification	Will be sent to user with invoice in pdf file and user subscription detail.

→ Field of Payment

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	payment_method	radio	Yes	1	1	required/at least one payment selected
2	create_info	text	Yes			required/valid card information

v. Login page for FINFO admin or editor

Footnote	Item Name	Notes
1	Layout Template	Will be responsive through phone and tablet.
2	Menu	There will be main menu and submenu
3	Content	Will be dynamic according to database

→ Field of Login

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_name	text	Yes	5	50	required/valid email address/user existing in our app
2	account_password	password	Yes	5	50	required/compare password with user in database

b. Front End – Client Public Website
i. Home page and other dynamic pages

Footnote	Item Name	Notes
1	Layout Template	This will be a pre defined template from FINFO backend. layout will be responsive through phone and tablet.
2	Menu	There will be main menu and submenu
3	Content	Will be dynamic according to database

ii. Login page

Footnote	Item Name	Notes
1	Layout Page	Will be responsive through phone and tablet.
2	Sign in button	This will allow only FINFO admin or editor to login. validation will check against user type.
3	Fields	Account, Email, Password
4	Link to forgot password	after clicked, user will be routed to forgot password page

→ Field of Login

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_name	text	Yes	5	50	required/valid email address/user existing in our app
2	account_password	password	Yes	5	50	required/compare password with user in database

iii. Forgot password

Footnote	Item Name	Notes
1	Layout Page	Will be responsive through phone and tablet.
2	Reset button	This will allow only FINFO admin or editor to login. validation will check against user type.
3	Process	This will check if email is existed in our DB then create a email with link to reset password page and send to user.

4	Fields	Account, Email
5	Link to forgot password	after clicked, user will be routed to forgot password page

→ Field of **Forgot password**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	email_address	text	Yes	5	50	required/valid email address/user existing in our app
2	new_password	text	Yes	5	50	required/match to confirm_password
3	confirm_password	text	Yes	5	50	required/match to new_password

c. **Back End – FINFO**
i. Dashboard

Footnote	Item Name	Notes
1	Chart	this will display for each module we create for dashboard
2	Upcoming invoice	this will show a list of upcoming invoice for clients
3	New client register	this will generate chart for register today, this week and total
4	other	other information will be provided by Wizwerx

→ **Field of new client register**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_ name	text	Yes	6	20	check if account user is not exist/required
2	package_name	radio	Yes	1	1	check at least one package selected/required
3	sex	dropdown	Yes	1	1	required
4	first_name	text	Yes	5	50	required
5	last_name	text	Yes	5	50	required
6	emai_address	email	Yes	5	50	required/valid email/unique

ii. User Management

Footnote	Item Name	Notes
1	User list	List all internal users for FINFO (only admin user can view users). This will also include pagination, search user, sort user.
2	User type	There will 2 types of user. 1 is FINFO admin (full control including manage user), 2 is FINFO editor (full control but cannot access to user module)
3	Create user, Edit user	Field will be provided by Wizwerx.
4	Email notification	New user will receive an email with user information and credential.
5	Delete User	This will be a soft delete, flag will set on that user for soft delete
6	Publish and Unpublish user	This is be a feature to enable or disable user
7	User created by / at	This will display who create new user / datetime

| 8 | User edited by / at | This will display who edited users / datetime |

iii. Website Update (CMS)

Footnote	Item Name	Notes
1	Menu and Submenu	FINFO will be able to create page menu and submenu
2	SEO	FINFO will be able to input meta keyword, meta description and title for SEO standard requirement
3	Page content	Content creator will be used a simple text editor which also including upload image
4	Create / Edit	Fields will be provided by Wizwerx
5	Menu ordering	FINFO will be able to order menu up or down for display in public site
6	Publish / Unpublish	This is be a feature to enable or disable page
7	Page created by / at	This will display who create new page / datetime
8	Page edited by / at	This will display who edited page / datetime

→ Field of content editor

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	title	text	Yes	5	50	required
2	slug	text	Yes	5	50	required
3	content	text editor	Yes			required
4	status	dropdown	Yes			required
5	order	text	No			
6	meta_title	text	No	0	50	
7	meta_desc	tex	No	0	300	
8	meta_keyword	text	No	0	50	

iv. List of clients & company information

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	Search and filter	Fields will be provided by Wizwerx, search for client
3	Add / Edit(optional) client infor	Fields will be provided by Wizwerx
4	Clients and company	This will display all client information with company detail
5	Pagination	This abilities should be can show previous and next records
6	Domain	Fields will be provided by Wizwerx
7	Add / edit Contact	FINFO will add / edit contact for each client user
8	Subscription	Display all subscription that belong to client
9	Field informations	

→ Field of clients contact

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required

1	phone_number	text	No	2	100	check minimum and maximum character
2	age	text	No	2	3	check minimum and maximum character
3	dob	drop-down	No			dd/mm/yy
4	passport	text	No	7	9	check minimum and maximum character
6	fax_number	text	No	8	12	check minimum and maximum character
7	discovery_email	text	No		100	valid email
8	address	text	No	3	100	check minimum and maximum character

v. Billing

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	Add / Edit / Delete Transaction	Fields will be provided by Wizwerx, send email to client when add new transaction
3	Bill list	This shows all bill information with status (Pending, Cancell, or Active)
4	Pagination for Bill	This abilities should be can show previous and next records
5	Search and filter Bill	Fields will be provided by Wizwerx
6	Add / Edit / Delete Invoice	Fields will be provided by Wizwerx, send credential information email to client when add new invoice
7	Invoice list	This shows all invoice with important information will provide by Wizwerx that related to client
8	Pagination for invoice	This abilities should be can show previous and next records
9	Search and filter invoice	Fields will be provided by Wizwerx
10	Email	Send email alerts to client to inform about date is will nearly expire

→ Field of **Billing**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_name	text	Yes	2	100	check minimum and maximum character
2	package_name	text	Yes	2	3	check minimum and maximum character
3	expire_date	drop-down	Yes			dd/mm/yy
4	email_address	text	Yes	7	9	check minimum and maximum character

vi. Revenue/Profit (Monthly/Yearly)

Footnote	Item Name	Notes
1	Revenue list	Display all sale earning a period of time
2	Filter revenue	Fields will be month, and year
4	Pagination	This abilities should be can show previous and next records

→ Field of Revenue/Profit

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	title	text	Yes	2	100	check minimum and maximum character
2	date	drop-down	Yes	2	3	mm/yy

d. Back End – Client

I. Dashboard

II. User Profile / Account Information

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	Edit User Information	Fields will be provided by Wizwerx. He/she can not change his account name but other field can.

→ Field of edit client information

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	account_ name	text	Yes	6	20	check if account user is not exist/required
2	package_name	radio	Yes	1	1	check at least one package selected/required
3	sex	dropdown	Yes	1	1	required
4	first_name	text	Yes	5	50	required
5	last_name	text	Yes	5	50	required
6	emai_address	email	Yes	5	50	required/valid email/unique

III. Settings

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	Template look like	This abilities could change the template color, font size, logo for front end

→ Field of setting

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	color	text	Yes	6	20	check if account user is not exist/required
2	logo	radio	Yes	1	1	check at least one package selected/required
3	font_size	dropdown	Yes	1	1	required

IV. Client's User Manager

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	User type (Admin)	Allow access to all module such as list all contents, approve content, approve client user, add/edit/delete/list client user, reset client user password.
3	Add/edit/delete user type (Admin)	Admin user can add/edit/delete all users, fields will be provided by Wizwerx
4	List user (User type Admin)	Display all user type(editor) that belong to main domain user
5	User type (editor)	Allow edit own details, change own password, and add/edit content
6	Reset password	Fields will be provided by Wizwerx, admin user can change user type (editor) password
7	Pagination	This abilities should be can show previous and next records
8	Search and filter	Fields will be provided by Wizwerx, and search client user

→ Field of **Forgot password**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	email_address	text	Yes	5	50	required/valid email address/user existing in our app
2	new_password	text	Yes	5	50	required/match to confirm_password
3	confirm_password	text	Yes	5	50	required/match to new_password

→ Field of clients contact

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	phone_number	text	No	2	100	check minimum and maximum character
2	age	text	No	2	3	check minimum and maximum character
3	dob	drop-down	No			dd/mm/yy
4	passport	text	No	7	9	check minimum and maximum character
6	fax_number	text	No	8	12	check minimum and maximum character
7	discovery_email	text	No		100	valid email
8	address	text	No	3	100	check minimum and maximum character

V. List of Modules subscribed to/ Package information

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	List Module / package	Display all module/package that client have been subscribed
3	Package	Allow client to upgrade the package
4	History package	Keep track previous package. eg: currently client use "Bronze" then he/she upgrade to "Silver" so in history list will so previous package is "Bronze"

| 5 | Unsubscribed | Allow user to disable the package/module (Disable their account) |

→ Field of **upgrade package**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	package_name	text	Yes	5	50	required
2	account_name	text	Yes	5	50	required/ check account_name is existing
3	module_infor	text	Yes	5	50	required

VI. My Invoices

Footnote	Item Name	Notes
1	Layout page	Will be responsive through phone and tablet.
2	List past invoices	Display all invoice that already claim.
3	List upcoming invoice	Display all invoice that will claim.
4	Search and filter	Fields will be provided by Wizwerx

VII. Payment Gateway option

Footnote	Item Name	Notes
1	Payment transaction	Allow user to select with payment he/she want to process with invoice
2	Payment option (optional)	Implement payment function to apply to user register

e. Package features
i. Latest Financial Highlights
1. Backend

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	Create/ Edit / Delete	Field will be provided by Wizwerx
3	Features	Initial setup of financial year is required If this is the initial setup, allow user to enter the previous quarters financial results and its labels (eg. 3Q13). Optional If this is the subsequent quarter, allow user to enter the quarter's financial results 1st to 3rd quarter financial result will use the predefined rows and labels setup in the initial setup. 4th quarter financial result may have a different setup
4	Select quarter	There will be 4 quarter and full year option to choose

5	Select year	Year range will be provided by Wizwerx
6	Insert title and value	This will be dynamic field created by add new field button
7	Process	When new quarter inserted the old quarter will move to Archive table
8	Listing/ search/ filter	Client will be able to see latest financial list. Client also can search and filter with different criteria

→ Field of **Latest Financial Highlights**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	title	text	Yes	5	50	required
2	file_name	file	Yes			required/ check file size maximum 3M
3	description	text	Yes	5	50	required
4	financial_date	drop-down	Yes			mm/dd/yy/required

2. Front End

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	There will be a link on client front end to view latest financial highlights	Data will display in table format with title, value from current quarter and last quarter and Growth in percentage. Formulas will be provided by Wizwerx.

ii. Real-time stock pricing and charts
1. Backend

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	ASX APIs	ASX will provide APIs for FINFO to connect and get stock data
3	Create/Edit	Field will be provided by Wizwerx

4	Feature	- Task scheduler/Batch process to retrieve the stock price
		- Allow client to change settings, subject to ASX's guidelines. See below for settings:
		   - Lag time (5 mins / 1 hour)
		   - Graph settings (axes)
		   - Chart colour (red, blue, green, yellow)
		   - Graph colour (red, blue, green, yellow)
		   - Price Index colour (red, blue, green, yellow)

2. Front End

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.

2	Stock widget box for home page	This widget will display stock price, changes, volume, date time in a box. The data will update in sequence of time defined by backend.
3	Click on stock widget	Will route user to stock chart page
4	Stock chart page	This page will display a chart graph with periods filter (3 months, 6 months, 1 year, 2 years, 5 years). Graph will automatically updated in a period of time which define by backend.

iii.   Financial Annual Reports
1.   Backend

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	Create/ Edit/ Delete	Client will be able to update cover image, pdf file, and financial year. (pdf is limted to 3MB large and only 1 file allow to upload in a record). Client will be able to delete any specific record (This is also delete pdf file from system)
3	List/ search/ filter	Client will be able to see a record listing, client will also be able to search and filter record base on different criteria
4	Email alert	after new record saved, email notification will be generated and send to all subscribers. Email content will contain a link to download financial pdf.

→ Field of **Financial Annual Reports**

No.	Name of Field	Type	Mandatory	Minimum	Maximum	Validation Required
1	title	text	Yes	5	50	required
2	file_name	file	Yes			required/ check file size maximum 3M
3	description	text	Yes	5	50	required
4	financial_date	drop-down	Yes			mm/dd/yy/required

2.   Front End

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	Annual reports listing page	This page will display a list of annual reports with cover image order the by years decending
3	Click on each report	When click on each report, pdf file will be downloaded.

iv.   Press Release
1.   Backend

Footnote	Item Name	Notes
1	Layout	will be responsive in phone and tablet.
2	Create/Edit/Delete	This page will display a list of annual reports with cover image order the by years decending
3	Click on each report	When click on each report, pdf file will be downloaded.

2.   Front end

v.