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2020-02-07

This is a list of the things I can think of that the new DB will have to do. I recommend reading the “Membership Database Business Rules” first to understand the user roles.

# Deletions

Members: We never delete members. They may get “promoted” or transferred, but we never remove them from the db.

Households: We generally don’t delete households. For transferred families and individuals, we retain the household (and last address info). Address info probably could be purged after a couple years, but that’s unnecessary functionality for now.

Addresses: temporary addresses for, e.g., students could be deleted. When a temporary address is no longer valid, the “temporary address” reference in the Member document is nulled; maybe address is deleted at that point?

# Updates (meaning, no change in references)

We need to be able to update Members and the Address associated with a Household. Update any Member field. Add and subtract Transactions and Service records.

# Change Member status

Don’t alter the Member status field directly; business logic should ensure that status is properly updated when a Transaction is added. (This probably should be business logic in backend.)

# Transactions

## Add a family

“Family” could be a single person, a couple, or couple with children. You have to add the people (member data for each), create a household, and specify head, spouse, and “others” in the household. Creating the household requires address, etc. See NewFamilyData in PMDataTypes.

## Transfer a family

Usually we transfer a family at a time. This mostly involves changes in status for each member. See TransferFamilyData in PMDataTypes.

## Baby or Adoption

New member of a household

## Baptism

Add baptism data to a member.

## Profession by covenant child

Typically change of status of one member of a household.

## Child leaves home

Typically when a child (communing or not) returns from college we set them up as their own household, even if they’re still living at home.

## Death

A member dies. Change of status; household changes to nil. If the deceased was the head of their household, must make the surviving spouse (if any) the head of the household. We’ve never had a case where the head and spouse of a household both died effectively at the same time; might have to play such a case by ear. That might involve transferring some minor children from one household to another.

# Queries

The queries in current PM should be duplicated in the new system. Results of queries generally should be made available to other apps on the same desktop through, e.g., copy-paste buffers.