9th April 2013

**Dashboard**

Change welcome message to

~~“Hello <Name>,please select from the options below. (rather than what’s on your mind)~~

**Create New Buttons**

~~Any chance these buttons could be~~ **~~RED~~** ~~in colour as opposed to~~ **~~BLUE.~~** And same goes for the header row of the tables, could this be a shade of Red. SORRY – THIS IS PART OF THE DATATABLE PLUGIN AND CANNOT BE CHANGED FOR EACH DATABASE USER – SORRY.

**+ FANS** (Can we change this to **+ FANS AND ORGANISATIONS**)

The instruction says *“You can search by Name, or Postcode, or Company Name, or Phone Number”* – this needs to change to reflect all the ways someone can search – see table below

~~Could the display table default to showing 10 entries as opposed to 5. I feel displaying 5 is too small a list and there is always a chance that the admin user may not realise there are more entries. If you search for ‘Walsh’ you’ll see what I mean. I did this and wondered where Andy Walsh’s record was, then I realised there was a second page.~~

~~Also at present if you try and select 10 entries it doesn’t work, you have to select 25, then select 10.~~

**FIND FANS (via the FANS tab on navigation)**

~~When you go through the Fans tab, it is still showing as ‘Create New Contact’ and needs to be ‘Create New Fan’.~~

~~The column headings for the FAN search table needs to be as follows for two reasons, (1) different ways to find people, and (2) that there is enough info listed so an admin user could find key contact info without having to go into the individual record. We had missed off email address.~~

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| # | First Name | Last Name | Known as | Primary Email address | Landline | Mobile | Postcode | Memb No. |
|  |  |  |  |  |  |  |  |  |

~~For Organisation it needs to be as follows (only change is Company Name instead of Known as)~~

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| # | First Name | Last Name | Company Name | Primary  Email address | Landline | Mobile | Postcode | Memb No. |
|  |  |  |  |  |  |  |  |  |

**‘FIND ORGANISATION’ TAB**

~~Al, how easy is it to add an Organisation Tab in the Navigation?~~

~~So that if a user is searching for an Organisation they can do so through an organisation Tab as opposed to going through FAN then “Looking of an organisation”. As the club develops we’ll start having more and more organisation records, whether that be sponsors, community groups, other football clubs, suppliers etc.~~

**FAN DETAILS**

**GREEN indicates questions to Al**

~~AL, Is there an option to have a SAVE button at the top of the record as well as the bottom, so that it limits the possibility of the user not saving a record properly.~~

Also, if the user tries to click on another tab or tries to exit the screen without ‘Saving’ could there be a prompt to let the user know that they have not saved their record.

THIS ISSUE WITH THIS IS THAT WE’D NEED TO WRITE AN ENTIRE NEW MODULE THAT CONSTANTLY MONITORED FOR UNSAVED CHANGES. I HAVE ADDED IT TO THE DEVELOPMENT SCHEDULE FOR PHASE 2 AS ITS A GREAT IDEA BUT IT WONT BE POSSIBLE TO DO THIS IN THIS PHASE. SORRY PAUL.

|  |  |
| --- | --- |
| **Field** | **Paul’s Comment** |
| Record Type (individual or Organisation)  (currently this sits towards the bottom of the details) | ~~Have this as first option~~  (And if individual is selected remove the option to enter Organisation above address) THE ORG FIELD NEEDS TO BE THERE FOR THE POSTCODE FINDER TO WORK PROPERLY – I HAVE TRIED REMOVING IT BUT THE POSTCODE FINDER BREAKS! |
| Title | ~~Mr, Mrs, Ms, Miss, Dr (remove Lord)~~ |
| First name | - |
| Last name | - |
| Known as | - |
|  |  |
| Primary Email | - |
| Secondary Email | - |
| Gender | - |
| Date of Birth | ~~To be displayed as dd/mm/yyyy~~  ~~And have a better way to select it~~ |
| Membership No. | Un-editable  Populates only on data import or when a new member purchase has been made when no number already exists.  This field remains blank if the Fan has never been a member |
|  |  |
| Postcode Finder | - |
| Organisation Name | (should only appear when organisation is selected) SEE ABOVE |
| Address 1 | - |
| Address 2 | - |
| Address 3 | - |
| City | - |
| County | - |
| Country | ~~(Al – is it possible to have a drop down list to avoid errors e.g.users enter England instead of United Kingdom, USA instead of United States etc - The reason is so that we can pull info off all Fans by country/ Therefore it’s vital that all country names are consistent. If we can do this, can we have United Kingdom as top of the list?~~ I HAVE CREATED A TYPE-TO-DROP-DOWN AS A PROPER DROPDOWN LIST IS TOO LONG FOR THE PAGE |
|  |  |
| Postcode | - |
|  |  |
| Landline | Although there are benefits of data export for the phone number to read as one long number, having a long number would make it more difficult to read if staff are wanting to make outbound phone calls?  For landline’s we’ll rarely need to export data.  Al, can you advise on the best solution  I HAVE WRITTEN AND INCPORPORATED A ‘MASK’ LIBRARY THAT FORCES THE USER TO ENTER DATA IN A SPECIFIC FORMAT. I CAN AMEND THIS TO FIT YOUR ORG NEEDS. |
| Mobile | As there is no defined way of writing mobile numbers, I suggest we keep this to one long number. The mobile number will be exported for SMS use. Al – is there a way for the number to automatically become/change to one long number even if the user enters spaces when inputting?  I HAVE WRITTEN AND INCPORPORATED A ‘MASK’ LIBRARY THAT FORCES THE USER TO ENTER DATA IN A SPECIFIC FORMAT. I CAN AMEND THIS TO FIT YOUR ORG NEEDS. |
| Work Number | Please delete this field  DELETED – BUT ADDED OVERSEAS NUMBER AS THE ‘MASK’ FEATURE PREVENTS ENTERING OF NON-UK NUMBERS |
| Facebook Name | We can’t contact anyone via our facebook page so I don’t think we need this.  Please delete this field  DELETED |
| Twitter ID | - |
|  |  |
| Where did you hear about us? | This isn’t relevant or useful to us. We would never use this data. Also I think it’s difficult to pin point when you first heard about a football club  Please delete this field  DELETED |
|  |  |
| Opt In: |  |
| Preferred method (Email, Post, SMS) | - |
| Emails | - |
| SMS | - |
| Post | - |
| Newsletter | (I don’t think we need this as an option) Please delete this field  DELETED |
| Merchandise Emails | - |
| Club Events | - |
| Away Match Travel | - |

**RELATIONSHIPS**

The rational behind having this was to:

1. Try and reduce multiple contacts with fans in the same household, e.g. when ringing up fans to renew membership, community shares etc. A quick look on the system will allow the admin user to see if another member exists at the same household so not to make multiple phone calls.
2. Identify parent/child relationships if child is a junior member

As it stands, this section is open for misunderstanding from the admin users point of view so we could end up with all sorts of information in there, and therefore ending up not being useful at all.

I suggest that we simplify this to have two **‘Reasons for relationship’** options.

1. Same household as…
2. Parent/Child relationship if child is under 18.

The way the system is built means that you it automatically updates both persons record thus only needing to enter the relationship once.

In terms of gathering this information, it is highly likely that shared households and parent/child realtionships will submit their membership application at the same time so the relationship will be obvious to the admin user of the relationship. For those that we aren’t aware of from the application, we could set up a report to identify members with same address, and then link the relationships.

OK – MAKES SENSE. DONE NOW.

**PURCHASES (Display)**

On the fans screen can the purchases default to showing 10 entries (currently shows 5)?

DONE

Can we change the Create New Order button **to ‘Create new Purchase’** so we have

consistency in terms.

DONE.

**CREATE NEW PUCRHASE**

**Date of Purchase:** (defaulted to today’s date but can be edited to select a date in the past)

DONE

**Item Bought:**  
**Year** (Can we change this to **Season**) as it will make more sense to the admin user. Can the dropdown list go as far back as 2005/06 season. It currently only goes back to 2009/10. These dates need to across all purchases. NOTE: Can we amend the order so that ‘Season’ comes after Item Bought and before Amount Paid

DONE

**Amount Paid:** Defaults to 2 decimal places when amount is entered

THIS IS TRICKY. I HAVE DOEN THE BEST I CAN - WHAT DO YOU THINK?

**Payment Method**: Cash / Cheque / Credit-Debit Card / Standing Order

DONE

**Source**: Online/Post/Telephone/Office/Stall

DONE

**Order Notes:**

In the display table on the details page, the following fields need be shown. The table should default so that most recent purchase shows first. (NOTE: I have removed Description, as I don’t think this adds to anything)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Date of Purchase | Item Bought | Season | Amount Paid | Edit / Delete |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

DONE

Also, similar to where you have the delete button, could you include a GREEN edit button, so that a user knows that they can edit a previous purchase. At the moment it’s not obvious that you can do this. THIS WOULD MEAN A REWRITE OF THE TABLE. CAN WE TRY IT FIRST AS I DISAGREE – I THINK THAT USERS WILL WORK OUT THAT BY CLICKNG ON IT IT WIL OPEN – CAN WE MONITOR?

**Sponsors Dropdown List:** as we noticed a that Matchball sponsor was missing

|  |
| --- |
| 127 Club |
| Match Sponsor |
| Matchball Sponsor |
| Matchday Programme Sponsor |
| Programme Adverts |
| Pitchside Hording |
| PINK Sponsor |
| Community Sponsor |
| Youth Team Sponsor |
| Player Sponsor |
| Women's Team Sponsor |
| DONE |

**AUTOMATED MEMBERSHIP NUMBERS**

Al, the latest membership number is 24322, so I suggest that we start the automated number generation at 26,000 rather than 50,000 as we previously discussed.