THE DATA COMPANY
YOUR DATA | OUR EXPERTISE

MEMBI BRD - FEATURES

EFFECTIVE DATE	VERSION	DESCRIPTION

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Roles

The user roles identified from the Spec document are:

1. Application Admin User
2. Public User (?)
3. Organisation Super Admin User
4. Organisation Admin User
5. Organisation Read Only
6. Group Admin User
7. Individual Users
   a. Adult Users
   b. Junior Users
8. Group Members
   a. Group Administrators
   b. Family Groups
   c. Corporate Groups
9. External Applications

Features

The features below are broken up by user role:

Public User

View Membi public pages

The public user will be able to view all the public pages of the Membi public web site such as the home page, help pages, about us pages etc.

View Organisation public pages

The public user will be able to view the public pages of organisations that are registered on Membi. The public user will be able to create a membership of the club or begin the event booking process from this page.

Organisation Search

The public user will be able to search for organizations that have been registered on the Membi platfom and be navigated to the public page of the organization that they select out of the search results.

Account Creation / Sign-in

The public user will be allowed to sign-in to the application or create an account on Membi. This will trigger the account creation process. They will also be navigated to this process when they attempt to create a membership or book an event from an organization's public page.

When the public user creates an account or attempts to sign into an account the application should perform validations to check if the user email address is already linked to an existing account, password strength, password accuracy, junior profiles etc.

Organisation Resource Booking (Out of Scope)

This item is out of scope for the beta release.

Organisation Shop (Out of Scope)

This item is out of scope for the beta release.

Organisation Super Admin / Admin Members

The following features are applicable to organisation super admin and admin members:

Create Organisation

A user will be navigated to this page from the public home page.

On this page, they will capture their details to create an account. This user will become the super admin of this organization. They will then capture details about the organisation. This page will also contain text about the Membi privacy policy with a link to the privacy policy.

Once they click “Start Trail” button, the organisation admin will then be navigated to the organisation page.

Organisation Page

The admin page will consist of a navigation menu on the left-hand side of the page with links to the Public Home, Admin Home and each of the sections in the admin home. It will further consist of the following expandable sections:

- Users
- Subscriptions
- Events
- Orders
- Emails
- List
- Reports
- Organisation Settings
- Warnings
- Audit Trail
- Downloads
- Gallery

Organisation Configurations

The organisation super admin and admin users will be allowed to edit organisation settings and functionality.

The organisation admins will be allowed to edit their phone number, address and logo.

They will be able to create subscription types for their organisation. If subscription types are created for member types that they did not configure for their organisation (Juniors, Family / Corporate Groups), those member types get created for their organisation.

They will further be able to configure and edit membership forms. The fields in the membership form that can be configured will be:

- Default address country: The application should prepopulate this field with the country derived from the IP Address of the Organization super admin.
- 2-Factor Authentication: By default this should be enabled.
- Physical Address: By default this should be required. And a message should be displayed to the organisation admin if it is required. If groups have been selected when setting up the organisation, the organisation admin should further have the ability to specify if all members of the group needs to provide have to provide an address or not.
- Junior Members: Where junior members have been configured for an organization, the organization admin will be allowed to configure:
    - Age where they are no longer a Junior (default = 18)
    - If their subscription is not be renewed if they are no longer a Junior (default =Yes). If yes, they can select if the system should automatically switch them to another subscription at this time and select the subscription they should automatically be subscribed to.
    - Who can sign consent/declarations (default = Only Adults in family)
    - If the member is required to sign declarations when they become an adult (default = Yes)
- Whether the organization has membership numbers (Default = Yes). If the option selected is yes, the organization admin will also configure how numbers are allocated to members in groups (Default = Each individual in the group gets a number)
- The period after which inactive members are removed or archived.

Group Management

The organization admin will be able to configure if a member in a group can complete consent or declarations on behalf of other adults (default = Yes) and if no is selected here, a message should be displayed.

Event Creation

The organization admin will have functionality related to event creation such as copying a previous event, or capturing event details (with the ability to add multiple dates via a csv upload), add pricing options, add discount options, capacity and configuring events to have waiting lists, applications etc.

After an event was created the organisation admin will have the ability to make changes to the details of the event, update limitations on attendance, change prices, and cancel the event.

Resource Booking

This item is out of Scope for the Beta Testing release.

Member Management

The organization admin will have some functionality that they will perform in addition to the configuring the membership form. This functionality includes:

- The ability to add members to an organization.
- The ability to create groups
- The ability to add members to groups
- The ability to remove members from groups – the system should perform validations when this is done.
- The ability to update email contact rules for individual members or groups. – the system should perform validations when this is done.
- The ability to add members to the organisaiton via bulk import (Out of scope for beta release).
- The ability to remove or archive members individually or in bulk – the system should perform validations when this is done.
- The ability to edit membership forms after the initial configuration
- The ability search through, filter, and sort the list of members and select members from the member list to perform actions such as (adding members to lists, emailing, downloading etc).
- The ability to merge member accounts.
- The application should keep track of users who fail to complete checkout and warn the organisation admin about this.

Subscription Management

The organisation admin users will be able to configure settings around subscriptions for their organisation.

The admin will be able to configure various options, such as the whether members can have more than one subscription at a time, configurations related to when the members will be prompted to renew their subscription, whether junior subscriptions will be allowed, and whether group subscriptions will be allowed.

They will also be able to create and schedule emails to notify members of subscriptions that will expire where subscriptions are not automatically renewable.

Orders Management

The order management component will provide the organization administrator with an overview of orders that have been placed by members in a specified period. There will further be expandable sections showing the orders placed in the last 30 days by status and payment method, orders where actions are required by the organisation admin (refunds due, cancellation requests, orders where members need to make a payment etc.), an orders list that can be filtered, searched, and actions such as downloading the orders can be performed, warnings that inform the organisaiton administrator of orders that have issues such as payment problems etc, and an audit trail showing the changes made to orders.

In addition to this, the organisation administrator will be allowed to view or edit orders that have been placed or place orders on behalf of members.

Payments Management

The organisation administrator role will have the ability to configure payments methods for their organisation. They should also be able to set up admin payment methods that are admin-only payment methods and should not be made available to the members of an organisation.

The two methods that needs to be available for the beta release is

- Bank Transfer

  For this method, the organisation provides bank account details which is displayed to the user. When the account details is captured, the system should perform a verification to ensure the bank details are owned by the organisation.

  The admin should have the ability to manually change order statuses to reflect that it has been paid.

  The application should provide a recon functionality where the admin uploads a bank statement CSV, and the system suggests matches of payments received to orders on the system.

- Cheque / Cash
  Same as Bank Transfer.

Finance Management

The organization admin users will be responsible for configuration of payments and payment methods this will include:

- Currency (by default it will be the currency of the organisation's country) accepted for payments and whether multiple currencies are accepted.
- Whether VAT is applicable and what the rate is as well as the ability to configure additional rates.
- The ability to set Financial year end.
- The ability to add accounting codes to the system.

Content Management

The organisation admin user will be able to configure elements of the content of their organisation page.

This will include items like the labels that appear on buttons on their page, date and time formats used in the group, fonts, background colours, buttons colours, the content on the public and member pages of the organization.

The pages they should be able to customize are:

- Home page
- Subscription
- Event category
- Event page

Communications

The organization admin will be able to compose emails which can be sent on an ad-hoc basis or can be saved as a draft to be used for future communications.

They should also be able to configure email signatures for the organization admin users who have been granted the rights to send emails and also define the reply-to emails for orders

Lists Management

The organization administrator will have the ability to create a list of members who can be communicated with and invited to events among other things.

There will be two types of lists:

- Dynamic lists
  Lists created from saved filters. When the admin selects a dynamic list, the application should present the members from the full set of members who match the filters.
- Static lists
  Lists created by the admin of the users. These lists are managed by the organisation admin.

The organisation admins should be able to filter members to see members who are not on a list and should further have the ability to export a list to csv or pdf.

Report Configuration

The organization administrator will be able to configure reports to set what appears in the reports, who can see the reports and the frequency that reports are sent with.

The reports that can be configured will be:

- New Accounts
  - New people that have been linked to an organization.
- New Applications (Out of Scope)
  - Members who have applied to join an organization.
- New Subscriptions
  - New subscriptions that have been purchased.
- Event Bookings

    - New bookings for events (can be configured to see all events or selected events)
- New Members
    - TBD

Audit Trail

The application will have an audit trail that is viewable by the organization administrators for various actions performed by users and actions performed by the application.

Warnings

Warnings will be displayed to the administrators related to issues within the organization such as orders that are awaiting payment, orders for which payments have failed, subscriptions that are not auto-renewable that will be expired, junior members who will be converted to adult members and need their subscriptions upgraded to an adult subscription etc.

Shop Management (Out of Scope)

This component of the application is out of scope for the beta release.

Downloads

TBD

Gallery

The gallery will contain images that have been uploaded by the organisation administrators.

As a later feature the gallery will also consist of stock images related to a topic (sailing, tennis etc.).

Individual Organisation Members / User

My Home

The user home page will consist of collapsible sections that can be expanded to see more information. The sections will consist of:

- Upcoming Events
  This will show the next three events that have been scheduled by the organization with a button to allow the user to view more information about the event.

- My Event Bookings
  This section will show details of event bookings the user has made for the organisation (if they have any).

- My Subscriptions
  This section will display the details of the users subscription to the organisation (if they have any).

- My Orders
  This section will contain information about the current and older orders that the user has made or has been made on their behalf by an organisation admin.

- My Account Balance
  This section will show the balance amount that has been credited to the user for this organisation.

- Saved Payment Methods
  This section will display payment methods that the user has saved for themselves (if any).

- My Profile
  This section will display profile information to the user and allow them to edit the information that they are allowed to enter. The user will also be able to trigger the reset password flow from this section.

- My Membership Form
  This section will contain the membership form information that a user had to complete for their membership of the organization where one was configured by the organization administrator. They will also be allowed to edit membership form information in this section.

- Future Sections
  These sections are related to the out of scope items such as ecommerce shops and will be specified at a later date.

Subscriptions Management

Individual members will be allowed to renew existing subscriptions that are ending and are not set to automatically renew, cancel current subscriptions, swap existing subscriptions to a different subscription, edit forms that have been set up for a subscription and update payment methods to be used to for paying for a subscription.

When this is done, the application should perform validations to ensure that the user is selecting appropriate subscriptions and recording this in the audit trail.

Orders

In this section the user will be allowed to view information on their orders and will be allowed to request a cancellation of an order or edit form data.

For later releases, their will be actions in this section related to ecommerce orders and resource bookings.

Event Bookings

This section will consist of the events that users have booked, and events that they have been invited to. The users will be allowed to cancel bookings and make changes to forms that have been set up for an event.

Resource Bookings (Out of Scope)

This item is out of scope for the beta release.

Group Members

My Home

The group user home page will consist of collapsible sections that can be expanded to see more information. The sections will consist of:

- My Group
  This section will display information on group members that is visible to all members in a family group and to the administrator of a corporate group.
  For both group types, the administrator of the group will be allowed to edit member information, add group members, and remove group members.

- Upcoming Events
  This will show the next three events that have been scheduled by the organization with a button to allow the user to view more information about the event.

- My Event Bookings
  This section will show details of event bookings the user has made for the organisation (if they have any).

- My Subscriptions
  This section will display the details of the group members subscription to the organisation (if they have any).
  Group administrators will be able to see the subscriptions of the group and individuals in the group. If a member is not an administrator, they will only see group subscriptions and individual subscriptions that have been assigned to them.

- My Orders
  This section will contain information about the current and older orders that the group has made or has been made on their behalf by an organisation admin.

  Group administrators will be able to see all orders for the group. Non-administrators will only be able to see orders where they are the purchaser.

- My Account Balance
  This section will show the balance amount that has been credited to the group for this organisation.

  Group administrators should be able to see information for each member in the group. Non-administrators should only be able to see their own balance.

- Saved Payment Methods
  This section will display payment methods that the group has saved for themselves (if any).

- My Profile

This section will display profile information to the to the group administrator of all the members in the group and edit information for all members in the group. Non admin users will be able to see their own profile information and edit their own information only.

The group members will also be able to trigger the reset password flow from this section. The group admin will be able to do this for everyone in the group. Non-group admin members will only be able to do this for themselves.

- My Membership Form
  This section will contain the membership form information that group members had to complete for their membership of the organization where one was configured by the organization administrator.

  The group administrator will be allowed to edit membership form information for all members in the group. Non group administrators will only be allowed to do this for themselves.

- Future Sections
  These sections are related to the out-of-scope items such as ecommerce shops and will be specified at a later date.

Group Member Management

The administrator for the group will be able to add group members to their group, remove members from their group and manage the information for members in the group.

When the administrator performs these activities, the application should perform verifications related to subscriptions, orders, junior members, and groups.

These actions should also be tracked in the audit trail presented to the organization admin.

Subscriptions Management

The administrator of a group will be allowed to renew existing subscriptions that are ending and are not set to automatically renew, cancel current subscriptions, swap existing subscriptions to a different subscription, edit forms that have been set up for a subscription and update payment methods to be used to for paying for a subscription on behalf of individuals within the group or on behalf of the group as a whole. Individual group members will be able to manage subscriptions for themselves.

When this is done, the application should perform validations to ensure that rules relating to junior subscriptions, individual subscriptions etc. are respected.

Orders

In this section the group administrator user will be allowed to view details of all the orders in the group. Ordinary members of the group will only be allowed to see their own orders and those assigned to the group as a whole.

Group administrators will be allowed to request a cancellation or edit a form linked to an order on behalf of the group as well as for orders linked to an individual within the group.

Non-admin users will only be allowed to request a cancellation or edit a form associated with an order for orders that have been linked to them.

Event Bookings

This section will consist of the events that have been booked for the group or for individual members in the group, and events that they have been invited to.

The group administration user will be able to view event booking information for the group as well as for individual members in the group. Non-individual members will only be allowed to see group bookings and their own individual bookings.

The group administrator will be able to cancel bookings and make changes to forms that have been set up for an event on behalf of the group and on behalf of the members in the group. Ordinary group members will be allowed to cancel bookings and make changes to forms that have been set up for an event for themselves.

Resource Bookings (Out of Scope)

This item is out of scope for the beta release.

Application Admin Users

Organisation Management

The system administrator users will be allowed to perform certain functions related to the organisations on the application. The system administrator will be allowed to view organisation information being able to see the same information that the organisation administrator of an organisation is able to view.

The system administrator will further be able to extend the free-trail period of an organisation to allow them to continue using the application for free after their free-trail period has ended.

The system administrator will also be able to view organisation details, details on the organisation administrators, emails sent to the administrators, and orders placed with the organisation by a member.

Later features will include invoicing and viewing support tickets that has been raised by the organisation.

Invoice & Finance

This feature is out of scope for the Beta release.

This feature will provide a list of clients who need to be billed to the system administrator. In addition to this the system should run a job that will check for organisations who are nearing the limits of their billing plans.

This section will also allow the configuration of discount plans and codes that will give an organisation a discount on their subscription fees when used.

Communication

This component of the application will allow users to configure communication to the administrators of an organization. This will include the creation of email templates, email lists, ad hoc communications, and setting up once-off and recurring scheduled communications.

Content Management

The application administrator user will be allowed to configure the content of the public pages of the website. This includes items such as the home page, the help pages, about us pages, contact pages, and pricing pages and the content of applications such as tool tips.

Reporting

This component entails reports that are generated for the application administrator user such as New organizations that have joined, organizations that have left, payment information etc.

Job Scheduler

The system administrator will be allowed to schedule batch jobs and run a job ad-hoc jobs such as bulk delete scripts.

Support Ticket System

This is a later feature and not in scope for the beta release.

Integrations

The integrations listed below are required to provide functionality to the features above as well as

Payments (Out of Scope)

- GoCardless
- Paypal
- Opayo
- New payment methods TBD (Apple Pay, Google Pay)

Organisation API (Out of Scope)

- APIs exposed to orgs to allow:
    - Member Check
    - Event information
    - Order Checks
    - Pulling member lists

Accounting

- Xero

Access Control (Out of Scope)

- Key Fob / Door access (Could link to Member Check Above) (

Communication

- Mail Chimp (Out of scope)

Other

- Membership Cards (Out of Scope)
- Twitter / X

Migration

The migration will be done manually and will consist of a download of the organisation information from the Webcollect system and uploading it into the Membi system.