MEMBI BRD - FEATURES

EFFECTIVE DATE	VERSION	DESCRIPTION

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Introduction

Background

WebCollect is a software platform that allows ~~club~~organisations, societies, and associations to easily manage their members, membership programs, and events. WebCollect was founded in 2002 and over time the technology stack on which WebCollect was built has become outdated and the platform has not been maintained well, causing the application to become unstable, unscalable, and generally non-performant.

This resulted in the business growth stagnating and some customers leaving the platform and the WebCollect brand being damaged.

Purpose and Goal

The purpose of this initiative is to develop a new application, Membi, which will be built on a modern technology stack and have a more modern user interface.

Membi will contain many of the popular features from WebCollect as well as newer features requested by the WebCollect customers. These features will be rolled out in an iterative manner.

Value Proposition

The development of the new Membi platform will improve the experience for the existing customers and provide them with new features that will let them get more out of the platform. A modern stable platform will allow the business to pursue new customers and explore new revenue streams that was not available on the old WebCollect platform.

Audience and User Groups

The following user groups have been identified:

1. Public User
2. Organisation Super Admin User
3. Organisation Admin User
4. Organisation Read Only
5. Group Admin User
6. Individual Users
    a.　　　Adult Users
    b.　　　Junior Users
7. Group Members
    a. Group Administrators
    b. Family Groups
    c. Corporate Groups

8. Application Admin User
9. External Applications

Out of Scope

The following components will be out of scope for the beta release:

-   Resource Bookings
-   Image Gallery
-   Document Templates
-   Ecommerce Shops
-   Organisation Templates
-   Application-only organisations
-   Non-public organisations
-   New Member Application Reports
-   Application Approval process
-   Event configuration
-   Event Bookings
-   Event Waiting Lists
-   Event Check-in and Attendance Register
-   Discounts / Purchase Credits
-   Reporting
-   Volunteer management
-   Community Chat
-   Membership Cards
-   Bulk Updating Subscriptions
-   Age Dependant Subscriptions
-   Member Archiving
-   Instalment Subscriptions
-   Email Templates
-   Email Scheduling
-   Email unsubscribe options
-   Full / Partial Credits
-   Restrictions on Account Balances
-   Xero Integration
-   MailChimp Integration
-   GoCardless Integration
-   Stripe Integration
-   Opayo Integration
-   Offline Payments
-   Keyfob / Door access solution
-   Audit trail interface
-   Support Ticket solution
-   WebCollect Invoicing
-   Referral Discounts
-   Subscription and Events Sub-sections
-   Adding Members via Import

- Organisation API
- Downloads

Requirements

Public User

Public users are the users who navigate to the Membi homepage. These users can view and interact with the public facing components of the Membi application and with the public facing components of the organization pages.

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.

Membi Home Page

The membi home page will the page that the user lands on when they navigate to the Membi site. The page will consist of the following sections:

Section Name	Section Rules
Navigation Bar	This section will contain the navigation bar that the user can make use of to navigate to different pages within Membi. The links will consist of Home, About Us, Organisations, Help, Pricing, Search, Sign in. If the user clicks the search link, the user should be prevented with a search bar to search for organisations. Once these are clicked, the user should be navigated to the page for that option.
Banner Image	This section will be populated with the Banner Image for Membi.
Features	This section will contain an overview of selected Membi features.
User Testimony	This section will contain a testimony from a organisation admin.
Links	This section will contain links to the FAQ and Demo pages.
Call to Action	This section will contain a call to action for the user to start setting up an organisation. Once clicked, it will take the user through the flow to create an organisation.
Featured Clubs	This section will contain the names and logos of featured organisations on the platform. When the user clicks on one of them, they should be navigated to the public page of that organisation.

Organisation Public Pages

The user will be navigated to the public page of an organisation public page if the organisation has chosen to be public.

The page will consist of the following sections:

Section Name	Section Rules
Banner Image	This section will consist of the organisation banner image. Where the organisation has not uploaded a banner image, this section will be filled with a solid colour background.
Logo	This section will consist of the logo image of the organisation. Where the organisation has not uploaded a logo image, this section will not be displayed on the page.
Description	This section will consist of the description of the page. Where the organisation has not created a subscription, this section should not be displayed.
Events	This section will consist of the events. The admin user will be able to toggle the default view to be list view or calendar view. The user will be able toggle between the two views. If the user clicks on the event, they will be taken to the event page where they will be able to make a booking to the event.
Subscriptions	This section will consist of the subscription options that have been configured by the organisation administrators. The user will have buttons to view all the subscriptions where they will be able to add subscriptions to their basket.
Buttons	This section will consist of buttons allowing the user to join the organisation. Once this button is clicked, the user will be navigated to through the sign-up flow.

Events Page

The user will be navigated to the events page when they click on an event. The user will be allowed to select their ticket option from this page.

The events page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Event Title	Text Field	String	N/A	This field will be populated by the application with the Title of the event.
	Event Information	Text Field	String	N/A	This field will be populated with the description of the event that was created by the user when creating the event. If a description was not created, this field will not be displayed to the user.
	Select Date	Radio	- Event Dates	Yes	This field will be populated with the date that the organisation admin configured. Once the user selects a date, the ticket options that have been configured for that date by the organisation admin will be displayed.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Select Ticket Option	Radio	- Ticket Option	Yes	This field will be populated with the ticket options that the organisation admin configured for the selected date. Once the user selects the pricing option,
	Quantity	Spinner	Integer	Yes	This field will be populated by default with a "1". The user will be allowed to edit the quantity either by entering a different number or using the arrow buttons to adjust the number.
	Add to cart	Button			The user will use this button to add selected booking to their cart. Once event booking is added to the cart, the number of tickets available for that event should be reduced by the number of tickets added to the cart for half an hour. Once the half an hour has passed, the tickets should be available again.
	Next	Button			If the organisation admin has linked this event to another event, this button will be available for the user to click through to book a ticket for the next event. Once clicked, the user will be navigated to the event page for that event. If the event has not been linked to another event, this button will navigate the user to the cart page.

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Subscription Page

The user will be navigated to the subscription page once they clicked on the button to view the subscription options. The subscription page will consist of tabs for each of the subscription categories and an "All" tab that will display all subscriptions.

Within the tabs the following fields will be displayed for each of the subscription options:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Subscription Type Name	Text Field	String	N/A	This field will be populated with the name of the subscription type that was configured by the organisation admin.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Price Option Name	Text Field	String	N/A	This field will be populated with the subscription price option that was configured by the organisation admin.
	Subscription End Date	Text Field	String	N/A	This field will be populated with the subscription end date that was configured by the organisation admin.
	Quantity	Spinner	Integer	Yes	This field will be populated by default with a "1". The user will be allowed to edit this quantity either by entering a different number or using the arrow buttons to adjust the number.
	Add to cart	Button			The user will use this button to add the selected booking to their cart.

Below this will be a table that displays the pricing schedule. The first row of this table will be the date range. The second row of this table will be the price of that date range.

Cart Page

The user will navigate to the cart page to check out the items that they have added the cart. The cart page will consist of the following table:

Column Name	Column Type	Column Data Type	Column Rules
Item	Text Field	String	This column will contain the items that have been added to the cart. For subscriptions, the description will read "Subscription Type – Price Option". For subscription renewals, the description will read "Renewal of Subscription type – price option for member/group name". For event bookings, the descriptions will read "Event Name – Price Option Name " as well as the date if it is a single session.

Column Name	Column Type	Column Data Type	Column Rules
Price	Text Field	String	This column will contain the price of the item.
Remove Link	Button		This will appear next to each item in the cart. Once the user clicks this, the item will be removed from the cart and the total for the cart will be recalculated.

The last row of the table will be a total table which will contain the sum of the prices of the items in the cart.

The table will be followed by buttons for the user to navigate back to the page they were on and to proceed with the checkout.

If the user is not signed in when attempting to check out, they will be presented with the sign-in page and if they do not have an account, they will be required to register before proceeding with the checkout.

Before allowing the user to proceed with the checkout, the application must verify whether the user is eligible for the item that they are purchasing. If they are not eligible, the application should present them with the relevant warning message and present them with the options to register someone else if they are purchasing a subscription for a junior or a group subscription.

Where they are attempting to purchase a subscription renewal, the application should verify that they are still eligible for the subscription, if they are not, the system should display a warning message. If the organisation has configured a subscription path for that subscription, the user will be presented with the option to switch to that subscription or to select another subscription. If they select the subscription that has been configured for them, the subscription will start the day after their current subscription ends (if they have one in place) once it is paid. If they select to purchase a different subscription, their current subscription will be changed to not renewing status and the subscription they purchased will start the day after the old subscription ends, once it is paid for.

If the user attempts to purchase a subscription for which they already have a membership that is current or has recently expired and has a renewing status, the application should present a warning message to inform them of this and give them the option to renew their subscription or purchase for someone else. If they select the renew option, it will be added to their basket. If they indicate that they are purchasing for someone else, the subscription should be added to their basket and a group should be created for this user. The new users details should be captured as part of checkout. The application should verify if their subscription is expired or expiring soon with the status of renewable. If it is, they should be presented with the option to renew their subscription as well. If they select not to, the status of the subscription should be changed to not renewable. If they select to renew, their subscription should be added to the cart and should be changed to active once it has been paid for.

If the user attempts to purchase a subscription that is different from their current or recently expired subscription, the application should present a warning message to the user. The user should be presented with the options to switch at renewal time, replace their current subscription, renew the current subscription or purchase a subscription for someone else. If they choose to switch at

renewal, the existing subscription should become not renewing, the new subscription should be added with a start date for the day after the current subscription ends. If they choose to replace the subscription, if their current subscription should be marked as not renewing, if it is active the end date should be changed to today, and the new subscription should have a start date of the order date. If they choose to renew their subscription, the selected subscription should be replaced with a renewal for the current/recently expired subscription in the cart and should be processed. If they select to purchase for someone else, a group should be created and the user should be directed through the flow of capturing the new member as part of the checkout.

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 platform 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. They will be allowed to do this from the Membi homepage, an organizations public homepage or will be prompted to do so when attempting to check-out from the ~~basket~~ cart page.

The users should be able to sign-in using social login (Facebook / Google) and admin users should have 2-Factor Authentication using an application such as Google Authenticator.

Organisation Resource Booking (Out of Scope)

The public user will be able to view the availability of a club's resources via a calendar view and book and pay for the use of that club's resource for a specific time. The booking will be added to the public user's basket. This item is not in scope for the beta release.

~~Organisation Shop (Out of Scope)~~

~~The public user will be able to view the items of an organizations shop that has been added. The public user will be able to add items from the organization shop to the club basket.~~

Sign-in

The sign in page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Email	Text Field	String	Yes	The user will use this field to enter their email address. The application should validate that the email is in a valid format.
	Password	Text Field	String	Yes	The user will use this field to enter their password. The application should hide their password as they enter it.
	Forgot Password	Link			The user will use this button to indicate that they have forgotten their password. Once clicked, the user will be presented with a screen to enter their email address.
	Google	Link			The user will use this link to use their google account to sign-in. Once they do this, they will be navigated to a page where they can enter their google account credentials. If the credentials are confirmed, the user will be logged in.
	Facebook	Link			The user will use this link to use their Facebook account to sign-in. Once they do this, they will be navigated to a page where they can enter their Facebook account credentials. If the credentials are confirmed, the user will be logged in.
	Sign-in	Button			This button will be used to sign in to Membi. Once clicked, the application will verify that the entered email and password match what is stored against the user record. If successful, the user

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					will be directed to their My home page if they signed in from the Membi Home page, the organisation page if they signed in from the organisation public page, or the cart if they signed in from the cart page. If the email does not exist on the application or the password does not match what is stored for the captured email, the application should generate a user message to inform the user of this. If email and password match,
	Sign-up	Button			This button will be used by the user to sign-up. Once kicked off, the navigate the user to the sign-up screen.

Forgot password

If the user clicked the link to indicate that they have forgotten their password, the forgot password flow will be kicked off. The following fields will be presented to the user:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Email	Text Field	String	Yes	The user will use this field to enter the email address that is linked with their account.
	Submit	Button			The user will use this button to submit the email address they have captured. Once clicked, the application will validate that the email exists on the application records. If it does not, the application should generate a message informing the user of this. If it does, the application should generate a password reset email to the captured email address and inform the user of this.

Once the user clicks on the password reset link in the email, they will be navigated to a page where they can reset their password. This page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	New Password	Text Field	String	Yes	The user will use this field to enter their new password. The application should indicate the password strength.
	Confirm Password	Text Field	String	Yes	The user will use this field to confirm their new password. The application should validate that the two passwords match. If they do not, the user should not be allowed to proceed and should be presented with a warning message.
	Submit	Button			The user will use this button to submit their new password. Once clicked, the application will add the new password to their record and the user will be navigated back to the log-in page.

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Sign-up

The user will be directed to the sign-up screen from the sign-in screen. The user will be presented with the following fields on the sign-up screen.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	First Name	Text Field	String	Yes	The user will use this field to capture their first name.
	Last Name	Text Field	String	Yes	The user will use this field to capture their last name.
	Email	Text Field	String	Yes	The user will use this field to enter their email address. The application should validate that the email is in a valid format.
	Password	Text Field	String	Yes	The user will use this field to capture their password. The application should

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					measure and display the password strength.
	Google	Link			The user will use this link to use their google account to sign-up. Once they do this, they will be navigated to a page where they can enter their google account credentials and grant permissions to Membi to use their credentials.
	Facebook	Link			The user will use this link to use their Facebook account to sign-up. Once they do this, they will be navigated to a page where they can enter their Facebook account credentials and grant permissions to Membi to use their credentials.
	Confirm Password	Text Field	String	Yes	The user will use this field to confirm their new password. The application should validate that the two passwords match. If they do not, the user should not be allowed to proceed and should be presented with a warning message.
	Sign Up	Button			The user will use this field to sign-up. Once clicked, the application will verify if email address is already linked to an account in the application. If it is, the user should be presented with a message informing them of this. If it is not, and the user must go through setting up two-factor authentication, they will be navigated to a screen where they will be allowed to do this. If the user is not required to use two -factor authentication, the user will be directed to their My home page if they signed in from the Membi Home page, the organisation page if they signed in from the organisation public

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					page, or the cart if they signed in from the cart page.
	Sign In	Button			This button will be used by the user to navigate to the Sign in page. Once clicked, the user should be navigated to the sign in page.

Organisation Super Admin / Admin Members / Read-Only Admin Members

Organisation administrators are the users who manage the organisations created on Membi. The user who creates the organisation is automatically assigned the role of organisation super admin. The organisation super admin is able to assign the super admin, admin, and read-only admin roles to other members of the organisation and sets the permissions for these admin users.

Organisation Creation

Users will create organisations by selecting the create organisation link on the public page and creating an account or logging in, or by the clicking the create organisation button from the "My home" page once logged in.

Once the user clicks on the option to create a new organisation, they will be navigated through the organisation creation flow. Where the first page will allow them to capture details on the organisation.

The page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Header Text	Text Field	String	N/A	This field will be populated by the application with the following text: "Get Started with a Free Trail"
	About you section heading	Text Field	String	N/A	This field will be populated by the application with the following text: "About You"
	First Name	Text Field	String	Yes	This field will be populated by the user with their first name. If the user is creating the organisation from their "My Home" page, this should be populated with the first name they have captured on their account.
	Last Name	Text Field	String	Yes	This field will be populated by the user with their last name. If the user is creating the organisation from their "My Home" page, this should be populated with the last name they have captured on their account.
	Email Address	Text Field	String	Yes	This field will be populated by the user with their email address. The system should validate if the email address captured is in a valid format. If the user is creating the organisation from their "My Home" page, this should be populated with the email address they have captured on their account.
	Password	Text Field	String	Yes	This field will be populated by the user with their password. The application will display a password strength rating for the password captured by the user. If the user is creating the organisation from their "My Home" page, this field

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					should not allow the user to capture anything.
	About organisation section heading	Text Field	String	N/A	This field will be populated by the application with the following text: "About Your Organisation"
	Organisation Name	Text Field	String	Yes	This field will be populated by the user with the name of their organisation.
	Organisation Shortname	Text Field	String	Yes	This field will be populated by the user with a three-letter code which will serve as their organisation's shortname. The application should perform a verification to ensure that the shortname is unique in the application.
	Organisation Website	Text Field	String	No	This field will be populated by the user with the organisation's website.
	Default Email Address	Text Field	String	Yes	This field will be pre-populated with the email address of the user who is creating the organisation. The user will have the option to change the email address, if they do this the application should verify the email address captured is in a valid format.
	Does your Organisation Have	CheckBox	Boolean	Yes	This field will be populated with the text "Does you organisation have:" and have options for: - Adults and juniors, for example where you have family/junior subscriptions, adults booking events for their children. - Members who are corporate/non-family groups (e.g companies, associations).
	Start Trial	Button			This button will trigger the creation of the group on the application. The user will be automatically assigned the role of super

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					admin for the created organisation. A welcome email will be triggered to the user and the user will be navigated to the Admin home for this organisation.
	Privacy Policy Text	Text Field	String	N/A	This field will be populated by the application with the following text: "We may use and disclose the information that you provide, to provide membership, subscription and event management services to Organisations that you are linked to. We will not share your information for marketing purposes. For more information explaining how we use your information, please see our privacy policy."
	Privacy Policy	Link	String	N/A	This field will be placed after the privacy policy text. Once clicking, this link will direct the user to the Membi privacy policy page.

After the user creates the organisation, they will be navigated to the Admin page for that organisation.

Admin 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 the following items:

- Users
- Subscriptions
- Events
- Orders
- Emails
- List
- Reports
- Organisation Settings
- Warnings

- Audit Trail (UI out of scope)
- Downloads (Out of scope)
- Gallery (Out of Scope)

The admin page will consist of a basic overview for each section and when clicked on will reveal further information for that section. The metrics of the collapsed view for each of the components will consist of:

Section	Metrics
Warning Message	This will appear at the top of the admin panel in red when the organisation has an invoice that is due.
Users	Number of users
	Current Members
	Lapsed Members
	Search
	Add User button
Subscriptions	New Subscriptions in the last 10 days
	Total Subscriptions
	Add subscription button
Events	Next 3 events in the following format:
	[Event Date][Event Name][Bookings]
Orders	Orders in the last 10 days
	Number of Pending Payments
	Number of Pending Refunds
Emails	Last 3 Emails sent in the format:
	[Sent Date][Email Subject]
Finance	Last Month Revenue
Audit Trail	Last 3 Audit items

Once the user clicks on one of the unexpanded sections, or clicks on the menu button for that section, they will be navigated to a page where they can see further details for that section.

Organisation Configurations

Organisation admins will be allowed to edit the configurations of their organisation. The administrators will be allowed to navigate to this page from the navigation menu.

On the Navigation menu page, there will be four tabs: Basics, Appearance, Site Content, and Configuration.

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Basics

For the Basics tab, the page will consist of the following: ~~In this section the organisation admin should be allowed to configure the organisation settings, memberships, events, subscriptions, organisation page content, finance, admin users, reports and approval process.~~

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	About organisation section heading	Text Field	String	N/A	This field will be populated by the application with the following text: "About Your Organisation"
	Organisation Name	Text Field	String	Yes	This field will be populated by the application with the name of the organisation that was captured during the creation of the organisation. The user should be allowed to edit this field.
	Organisation Shortname	Text Field	String	Yes	This field will be populated by the application with the shortname of the organisation that was captured during the creation of the organisation. The user should not be allowed to edit this field.
	Organisation Website	Text Field	String	No	This field will be populated by the application with the website of the organisation that was captured during the creation of the organisation. The user should be allowed to edit this field.
	Default Email Address	Text Field	String	Yes	This field will be pre-populated with the default email address that was captured during the creation of the organisation. The user will have the option to change the email address, if they do this the application should verify the email address captured is in a valid format.
	Does your Organisation Have	CheckBox	Boolean	Yes	This field will be populated with the text "Does you organisation have:" The options will be pre-populated with the

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					options that were ticked during the set up of the organisation. If the user changes one of the options (e.g. Unchecks the box for group memberships), the organisation should verify that there are no active subscriptions for that role.
	Phone Number	Text Field	String	No	This field will be populated by the user with the phone number for the organisation.
	Address Line 1	Text Field	String	No	This field will be populated by the user with the first line of the address for the organisation.
	Address Line 2	Text Field	String	No	This field will be populated by the user with the second line of the address for the organisation.
	Address Line 3	Text Field	String	No	This field will be populated by the user with the third line of the address for the organisation.
	Post Code	Text Field	String	No	This field will be populated by the user with the post code of the address for the organisation.
	Country	Text Field	String	No	This field will be populated by the user with the country of the address for the organisation.
	Date Format	Drop Down	- MDY (Month, day, year) - DMY (Day, month, year) - YMD (Year, Month, Day)	Yes	The user will use this field to indicate date format that their organisation use.
	Time Zone	Drop Down	- UTC+14 - UTC+13 - UTC+12 - UTC+11 - UTC+10 - UTC+9	Yes	The user will use this field to indicate time zone that their organisation will use.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			- UTC+8		
			- UTC+7		
			- UTC+6		
			- UTC+5		
			- UTC+4		
			- UTC+3		
			- UTC+2		
			- UTC+1		
			- UTC		
			- UTC-1		
			- UTC-2		
			- UTC-3		
			- UTC-4		
			- UTC-5		
			- UTC-6		
			- UTC-7		
			- UTC-8		
			- UTC-9		
			- UTC-10		
			- UTC-11		
			- UTC-12		
	Update	Button			This button will trigger the saving of updated details.

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For the Basics tab, the page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Logo	Upload Field		No	This field will be used by the user to upload their organisations logo. This will appear logo area of their public page.
	Banner Image	Upload Field		No	This field will be used by the user to upload their organisations banner image. This will appear banner image area of their public page.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Primary Colour	Colour Thumbnail		No	This field will be used by the user to select a primary colour for their organisation.
	Secondary Colour	Colour Thumbnail		No	This field will be used by the user to select a secondary colour for their organisation.
	Button Colour	Colour Thumbnail		No	This field will be used by the user to select a button colour for their organisation.
	Update	Button		N/A	This button will trigger the saving of the appearance settings.

Site Content

The site content page will consist of 4 tabs called Public Home, Subscriptions, Event Category, Event Page

Public Home

Within the Site Content page, the Public Home tab will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Banner Image	Image			This field will display the banner image that will be displayed on the organisation public page. The user will be allowed to click on an edit button to allow the user to upload a banner image for the organisation.
	Logo	Image			This field will display the logo image that will be displayed on the organisation public page. The user will be able to click an edit button which will allow them to upload a logo image.
	Home Page Introduction	Text Field			This field will contain the text that will be displayed in the introduction section of the organisation public home page. The user will be able to click an edit button to edit the text that appears and will also be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					able to drag the field to another part of the page.
	Events	Text Field			This field will contain the content that will be displayed in the events section of the organisation public home page. The user will be able to set which view is shown on the public page and drag the field to another part of the page.
	About Us	Text Field			This field will contain the text that will be displayed in the about us section of the organisation public home page. The user will be able to click an edit button to edit the text that appears and will also be able to drag the field to another part of the page.
	Preview	Button			The user will select this button to view a preview of what the home page will look like. Once clicked, the application should display a preview of the organisation public home page.
	Save	Button			The user will select this button to save the changes made to the organisation home page content. Once clicked the changes made should be saved against the organisation.

Subscriptions

The subscriptions page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Category Tabs	Button			The category tabs will consist of the subscription categories that has been configured by the admin. The subscriptions that have been allocated to a category will appear underneath the tabs. The user will be able to rearrange the order of the tabs.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Subscription Name	Text			This field will be populated with the subscription name that has been configured for the subscription. The user will be able to edit the name.
	Subscription Description	Text			This field will be populated with the description that has been created for a subscription. The user will be able to edit the description.
	Subscription Price	Text			This field will be populated with the price that has been assigned to a description. The user will be able to edit the price options.
	Preview	Button			This button will be used by user to see a preview of how the subscription page will appear. Once clicked the application should show the user a preview of the subscription page.
	Save Changes	Button			This button will be used by the user to save the changes they have made. Once clicked the changes should be saved.

Events

The Event Category page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Categories	Link			The category field will consist of the categories that the users have configured and a picture. The users will be able to rearrange the categories and edit the picture for each category.
	Preview	Button			This button will be used by user to see a preview of how the subscription page will appear. Once clicked the application should show the user a preview of the subscription page.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Save Changes	Button			This button will be used by the user to save the changes they have made. Once clicked the changes should be saved.

The event page tab will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Event Description	Link			The Event Description portion of the page will consist of text that the user has created when setting up an event. The user will be able to drag this section to adjust where it appears on the events page.
	Event Image	Upload			This section will consist of an image that the user has uploaded for this event when setting up this event. The user will be able to drag this section to adjust where it appears on an event page.
	Ticket Options				The ticket option section will consist of the ticket options that was configured for an event when it was set up by a user. The user will be able to drag this section around to change where it appears on an events page.
	Preview	Button			This button will be used by user to see a preview of how the events page will appear. Once clicked the application should show the user a preview of the events page.
	Save	Button			This button will be used by the user to save the changes they have made. Once clicked the changes should be saved for this organisation.

Configuration

The configuration page of the organisation settings will consist of the following sub-pages:

- Members
- Events
- Subscriptions
- Financial
- Administrators
- Reports

Each of these sub-pages will be shown as a tab on configuration page.

Members

The Members page will consist of the following:

A table of the membership forms that have been created by the user for memberships in the organisation will be presented at the top of the page. The columns will consist of:

Column Name	Column Type	Column Data Type	Column Rules
Form Name	Text Field	String	This column will be populated with the name of the form that was created when the user created the form.
Create Date	Text Field	String	This column will be populated with the date that the form was created.
Creator	Text Field	String	This column will be populated with the name of the name of the user who created the list.
Membership	Text Field	String	This column will be populated with the name of the membership that the form was linked to when created.
Actions	Text Field	String	The actions column will contain buttons to edit the form. Once clicked, the user will be navigated to the form creation page where they will be able to make changes to the forms.

Above the table, a "create form" button will allow the user to create a new membership form. Once the user clicks this button, they will be directed to the form creation page.

Below the table, the configuration options related to membership within the organization will be available for users with the correct permissions to make changes to. The fields in this part of the page will consist of:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section Heading Text	Text Field	String	N/A	This field will be populated by the application with the following text: "Members"
	Default Address Company	Advanced Dropdown Menu	- Countries	Yes	The user will use this field select the default addr country of the organisat This field will be pre-populated with the country of user who created the organisation.
	2 Factor Authentication Enabled?	Toggle	- Yes - No	Yes	The user will use this field select if the members of organisation have to sign with 2 factor authentication. default, the toggle will be switched to "Yes".
	Physical Address	Radio	- Yes - No	Yes	The user will use this to se if the members will be requi to provide a physical addre This field should be accompanied by the note some of your members are groups, only one person will be required to provide an address. Those without an address will automatically use that address."
	Should all group members have to provide an address?	Radio	- No, group members can use the default address. - Yes, each individual member in the group must provide their	Yes	This field will be displayed when the organisation has indicated that they have corporate / non-family groups. If yes, each member in the corporate/non-family gro will be required to provide t own address.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			own address		
	At which age will a member cease to be a junior?	Text Field	String	Yes	This field will be displayed when the organisation has indicated that they have junior members. The value here will be used by the application to verify if a user is a junior or not. The default age will be 18.
	Subscription to be renewed if they are no longer a junior at renewal time?	Radio	- Yes - No	Yes	This field will be displayed when the organisation indicated that they have junior members. If yes, application should set a juniors status to swapping if they will be above the age where they cease being a junior. If no, the subscription will be set to not renewing if they will be above the age where they cease being a junior. The default option will be Yes.
	Should the system switch them to a different subscription at the renewal?	Radio	- Yes - No	Yes	This field will be displayed when the organisation indicated that they have junior members. If yes, organisation admin will be requested to set the upgrade path. If no, the member will be prompted to renew and will have to select the adult subscription option that they renew to. The default option will be Yes.
	Path fields	Drop down menus	- Subscription Options	Yes	This field will be displayed if organisation admin selected "yes" in the field above. The field will have two

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					drop down menus. The first will be populated with the junior subscription options. The second will be populated with adult subscription options. If the organisation admin has not created subscription options, the application should display a message informing them of this and that they should create some first.
	Add Path	Button		N/A	The button will be used to add more upgrade paths. Once clicked, the application will provide more drop downs for the organisation admin to specify paths.
	Who can sign declaration forms?	Radio	- Only Adults in Family - The Junior or Adults in Family,	Yes	This field will be displayed when the organisation has indicated that they have junior members. If only adults is selected, the adults should be allowed to sign declaration forms in this organisation. If junior and adults is selected, junior and adults will be able to sign declaration forms in the organisation. The default will be Only Adults in Family.
	Should the system require the member to login and complete any consents/declarations when they cease to be a junior?	Radio	- Yes - No	Yes	This field will be displayed when the organisation indicated that they have junior members. If yes is selected, after aging out of being a junior, they will

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					be required to sign declaration forms on their next sign-in. If no is selected, after aging out of being a junior, they will not be required to sign declaration forms on their next sign-in. By default, yes will be selected.
	Does your organisation have membership numbers?	Radio	- Yes - No	Yes	The organisation admin will use this field to indicate if organisation uses membership numbers. If yes, they will be required to provide further information. The default option will be Yes.
	If you have groups, how do you allocate membership numbers?	Radio	- Separate number to each individual in the group - Single membership number for the group.	Yes	This field will be displayed if organisation selected Yes to the question above. If the separate number option is selected, the application should allocate a membership number to each member in the group. If the single number option is selected, the application should allocate a single number to all members in the group. By default, the separate number option should be selected.
	Prompt administrators to archive/remove inactive members after:	Textfield & Drop Down	String - Months - Years	Yes	The organisation admin will use this field to indicate the period of time after which organisation admin will prompted to remove a user being inactive.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					The text field will accept numerical input only and the drop down will be populated with "Months" and "Years" the default selection in the drop down menu will be Months.
	Can a member complete consents/declarations on behalf of other adults in their group?				

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Subscriptions

For the subscriptions page, there will be a table of categories and configuration options for subscriptions. The subscriptions page will consist of the following fields:

Column Name	Column Type	Column Data Type	Column Rules
Categories	Text Field	String	This column will be populated with the name of the category.
Subscriptions	Text Field	String	This column will be populated with the subscriptions that have been assigned to the category.
Actions	Button		This column will contain buttons allowing the user to edit a category and delete a category. If the organisation admin clicks the edit button, the application will generate a window allowing the organisation admin to edit the name, and subscriptions in a category. If the organisation admin clicks the delete button, the application will delete the category and allocate the subscriptions in that category to an "Unassigned" category.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Can Members Have More Than One Subscription At a Time?	Radio	- No - Yes (if for example you are a multi-sports club with separate subscriptions for each sport)	Yes	This field will be used by the organisation admin to determine member can have more than subscription at a time. If no, application should validate that a user does not already have a subscription before allowing them to purchase another.
	Can members have an Other type of subscription without having a membership subscription?	Radio	- No - Yes	Yes	This field will be used by organisation admin to determine non-member can purchase an ot type of subscription. If no, application should verify that a u is member before allowing them to purchase an other type subscription.
	Definition of recently expired - Annual	Textbox	String	Yes	This field will be used by organisation admin to define wi annual subscriptions are considered recently expired. The number captured here will be the number of months where a subscription is considered expired.
	Definition of recently expired - Monthly	Textbox	String	Yes	This field will be used by the organisation admin to define when monthly subscriptions are considered recently expired. The number captured here will be the number of days where a subscription is considered expired.
	Definition of recently expired - Other Period	Textbox	String	Yes	This field will be used by the organisation admin to define when subscriptions that are not annual or monthly are considered recently

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					expired. The number captured here will be the percentage of the period within a subscription is considered expired.
	Definition of renewing soon - Annual	Textbox	String	Yes	This field will be used by the organisation admin to define when annual subscriptions are considered renewing soon. The number captured here will be the number of months where a subscription is considered renewing soon.
	Definition of renewing soon - Monthly	Textbox	String	Yes	This field will be used by the organisation admin to define when monthly subscriptions are considered renewing soon. The number captured here will be the number of days where a subscription is considered renewing soon.
	Definition of renewing soon - Other Period	Textbox	String	Yes	This field will be used by the organisation admin to define when subscriptions that are not annual or monthly are considered renewing soon. The number captured here will be the percentage of the period within a subscription is considered renewing soon.
	Junior Subscriptions			Yes	This field will be used by the organisation admin to select the upgrade path for each of the junior price options selected.
	How long should life subscriptions last for?	Textbox	String	Yes	This field will be used by organisation admin to select amount of years for which life subscriptions last.
	Specify a subscription that new	Radio	Yes No		This field will be used by the organisation admin to select the

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	members must buy (e.g. Joining Fee)				subscription that a new member must purchase. If yes is selected, the user will be presented with category, type and price option drop downs to select the subscription.
	When should auto-renewal orders be placed?	Radio And Text Field			For each payment method, the organisation admin will be allowed to select if members will be allowed to auto-renew for that payment method or not. If they indicate that members will be allowed to auto-renew for that payment method, the user will be prompted to capture the number of days before expiry where the order will be placed for that payment method.
	Subscription Forms: Option to have subscription forms for membership type subscriptions.	Toggle			By default, this will be unselected. If the option is turned on, application should display message: "Information about members is best collected in membership form. Please read this article about the very limited cases when this option should be used." Which will link them to a help article.

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Financial

The financial page in the organisation settings will consist of a table detailing the payment methods. This table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Method	Text	String	This column will be populated with the name of the payment method.
Description	Text	String	This column will be populated with a description of the payment method.

Column Name	Column Type	Column Data Type	Column Rules
Activated?	Text	String	This column will be populated with "Yes" if it is activated for the organisation and "No" if it is not active for the organisation.
Admin Only	Text	String	This column will be populated with a "Yes" if it is activated for the organisation admins only and a "No" if it is not activated for the organisation admins only.
Default	Text	String	This column will be populated with a "Yes" if the payment method is the default and a "No" if the payment method is not a default.
Actions	Buttons		This column will have buttons for the organisation admin to edit and deactivate payment methods that are active and activate payment methods that are not active.

Furthermore, other configuration options in the finance section will include:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Currency	Radio	Currencies	Yes	This field will be used by organisation admin to set organisation currency. This field will be populated with currencies that can be used.
	VAT Status	Drop down menu			This field will be used by organisation admin to configure vat status of the organisation. It will be populated with the VAT Statuses on Web Collect.
	Add VAT Rate	Button			This button will be used by organisation admin to add a vat rate setting the name and specifying the rate.
	Financial Year End	Month			This field will be used by organisation admin to select

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					financial year end. The month will be selected, and the year end will be set to the end of that month.

Beneath this will be a table showing accounting codes consisting of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Code	Text	String	This column will be populated with the code.
Accounting Group	Text	String	This column will contain the accounting group.
Actions	Buttons		This column will contain buttons for the use to Edit or Delete the code. If the edit button is clicked, the user should be presented with a window that allows them to edit the codes. If the delete button is clicked, the user should be presented with a warning message and if they confirm, the code will be deleted.

The fields for adding a VAT rate will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules	
	Vat Rate Name	Text	String	Yes	This field will be used by organisation admin to capture the VAT rate name.	**Formatted:** Font: Bold
	Vat Rate	Text	String	Yes	This field will be used by organisation admin to capture the VAT rate.	**Formatted:** Font: Bold
	Cancel	Button			This button will be used to cancel submission. Once clicked, the user should be navigated back to the organisation configurations page.	**Formatted:** Font: Bold
	Submit	Button			This button will be used to submit the submission. Once clicked, the	**Formatted:** Font: Bold

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					VAT rate should be available for the organisation to select.

The page to activate a payment method will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Surcharge Percentage	Text	String	No	This field will be used by the organisation admin to capture the surcharge percentage for the payment method if they wish to charge a percentage of the transaction value. If nothing is captured the value for this will be zero.
	Surcharge Amount	Text	String	No	This field will be used by the organisation admin to capture the surcharge amount for the payment method if they wish to charge a set amount. If nothing is captured the value for this will be zero.
	Surcharge Accounting Group	Text	String	No	This field will be used by the organisation admin to capture the surcharge accounting group for the payment method.
	Explanatory Checkout Text	Text	String	No	This field will be used by the organisation admin to explanatory text that should appear to their members in the checkout. If any is captured, the application should display the text to the member during checkout for this payment method.
	Explanatory Success Text	Text	String	No	This field will be used by the organisation admin to explanatory text that should appear to their members if the checkout was successful. If anything is captured,

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					the application will display the text to the member during checkout.
	Make Admin Payment Method	Toggle		No	This will be used by the organisation admin to make this payment method an admin payment method.
	Default Payment Method	Toggle			This will be used by the organisation admin to make this payment method the default payment method for the organisation.

Administrators

In the administrators tab of the organisation configurations page, the organisation admin will be allowed to manage the admin members of the organisation. The page will consist of a table of the current admin members, fields to grant admin rights to a member, fields to configure the email admin email who will receive emails and ability to set up an email signature.

The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text	String	This column will be populated with name of the admin user.
Admin Role	Text	String	This column will be populated with admin role of the admin user (super admin, admin, read-only admin).
Last Logged In	Text	String	This column will be populated with the date and time of the last login of the admin member.
Audit Trail	Button		This column will contain a button to view the audit trail for the admin user.
Reports	Button		This column will be used to view and edit the reports that the admin user.
Actions	Button		This column will contain buttons allowing the admin user to edit the users access rights and demote the user from admin. If the edit button is clicked, the admin user should be presented with the access rights fields to make changes.

Column Name	Column Type	Column Data Type	Column Rules
			If the demote button is clicked, the admin user will be presented with a warning message and if they confirm the action, the member's admin rights will be removed, and they will become a regular member.

The fields for granting access rights will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Member Search	Search Field		N/A	This admin user will use this field to search for a member using their name. The application should return results of members who match the search criteria.
	Role	Radio Button	- Read-Only Admin - Admin - Super Admin	Yes	The admin user will use this field to select the level of admin rights the user will have.

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The admin user will be presented with fields to select the access rights of the member being made an admin user.

For Read-Only Members the fields will be:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section	Text Field	String	N/A	This field will be populated by the application with the section name "Members".
	Detail	Text Field	String	N/A	This field will appear under the Members section. This field will be populated by the application with the text "Members List"
	View	Checkbox		Yes	This field will appear under the Members section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be used by the admin user to set if the admin member being set up will be able to view the Members list.
	Download	Radio	- No - Name / Email Only - Full (including form data)	Yes	This field will appear under the Members section. This field will be used by the admin user to set what the admin member being set up can download from member list. If no, they cannot download at all. If Name/Email only they can only download a list of the names and emails of the members. If full, they can download all member information and form data. By Default, this will be set to no.
	Detail	Text Field	- String	N/A	This field will appear under the Members section. This field will be populated by the application with the text "Individual Member Pages"
	View	Checkbox	-	Yes	This field will appear under the Members section. This field will be used by the admin user to set if the admin member being set up will be able to view individual member pages.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Subscriptions".
	Detail	Text Field	- String	N/A	This field will appear under the Subscriptions section. This field will be populated by the application with the text "Subscriptions"
	View	Checkbox	-	Yes	This field will appear under the Subscriptions section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be used by the admin user to set if the admin member being set up will be able to view the Subscriptions.
	All / Specified	Radio Button	- All - Specified	Yes	This field will appear under the Subscriptions section and will be displayed if the admin user has granted the read-only admin the right to view subscriptions. The user will use this field to select the level of access the admin user being granted access will have to the subscriptions. If All is selected, they should have access to view all subscriptions. If Specified is selected, the application should present the organisation admin with the message "You give them access on the relevant subscription page".
	Download	CheckBox	▲	Yes	This field will appear under Subscriptions section. This field will be used by the admin user to set if the admin member being set up can download subscription information. If it is ticked, they will be able to download subscription data. If they have been restricted to viewing specific subscriptions, they will only be able to download the data for those subscriptions.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Events".
	Detail	Text Field	- String	N/A	This field will appear under the Events section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be populated by the application with the text "Events"
	View	Checkbox		Yes	This field will appear under Events section. This field will be used by the admin user to set if the admin member being set up will be able to view the Events.
	All / Specified	Radio Button	- All - Specified	Yes	This field will appear under the Events section and will be displayed if the admin user has granted the read-only admin the right to view events. The user will use this field to select the level of access the admin user being granted access will have to the events. If All is selected, they should have access to view all events. If Specified is selected, the application should present the organisation admin with the message "You can give them access on the relevant event page".
	Download	Checkbox		Yes	This field will appear under Events section. This field will be used by the admin user to set if the admin member being set up will be able to download booking information for Events. If this field is checked and they were granted access to specific events, they will only be able to download information for that specific Events.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Orders".

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Detail	Text Field	- String	N/A	This field will appear under the Events section. This field will be populated by the application with the text "Orders list and Order pages"
	View	Checkbox	▲	Yes	This field will appear under Orders section. This field will be used by the admin user to set if the read-only admin will be able to view the Orders list and Order pages.
	All / Specified	Radio Button	- All - Orders for specified subscriptions or events - None	Yes	This field will be used by the organisation admin to select the access that the read-only admin will have for orders. All will provide access to All orders. Specified subs and events will provide access to only specific subs and events. None will provide access to no orders. If the read-only admin has been restricted to viewing specified subscriptions and events, the organisation admin will not be able to provide access to all here. Otherwise, all should be selected by default.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Emails".
	Detail	Text Field	- String	N/A	This field will appear under the Events section. This field will be populated by the application with the text "Email lists, Sent and Scheduled Emails"

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	View	Checkbox	-	Yes	This field will appear under the Emails section. This field will be used by the admin user to set if the read-only admin admin will be able to view the email lists, emails sent and scheduled emails.

For Admin access role, the fields will consist of:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section	Text Field	String	N/A	This field will be populated by the application with the section name "Members".
	Detail	Text Field	String	N/A	This field will appear under the Members section. This field will be populated by the application with the text "Members List"
	View	Checkbox		Yes	This field will appear under the Members section. This field will be used by the admin user to set if the admin member will be able to view the Members list.

	Download	Radio	- No
			- Name /
			   Email Only
			- Full
			   (including
			   form data)
				Yes	This field will appear under the Members section. This field will be used by the admin user to set what the admin mem can download from the member If no, they cannot download at al If Name/Email only they can only download a list of the names and emails of the members. If full, they can download all member information and form data. By Default, this will be set to no.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Detail	Text Field	- String	N/A	This field will appear under the Members section. This field will be populated by the application with the text "Individual Member Pages"
	View	Checkbox	-	Yes	This field will appear under the Members section. This field will be used by the admin user to set if the admin member will be able to view individual member pages.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Subscriptions".
	Detail	Text Field	- String	N/A	This field will appear under the Subscriptions section. This field will be populated by the application with the text "Subscriptions"
	View	Checkbox	-	Yes	This field will appear under the Subscriptions section. This field will be used by the admin user to set if the admin member will be able to view the Subscriptions.
	All / Specified	Radio Button	- All - Specified	Yes	This field will appear under the Subscriptions section and will be displayed if the admin user has granted the read-only admin the right to view subscriptions. The user will use this field to select the level of access the admin user being granted access will have to the subscriptions. If All is selected, they should have access to view all subscriptions. If Specified is selected, the application should present the organisation admin with the message "You

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					give them access on the relevant subscription page".
	Download	CheckBox	-	Yes	This field will appear under Subscriptions section. This field will be used by the admin user to set if the admin member can download subscription information. If it is ticked, they will be able to download subscription data. If they have been restricted to viewing specific subscriptions, they will only be able to download the data for those subscriptions.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Events".
	Detail	Text Field	- String	N/A	This field will appear under the Events section. This field will be populated by the application with the text "Events"
	View	Checkbox	-	Yes	This field will appear under Events section. This field will be used by the admin user to set if the admin member will be able to view the Events.
	All / Specified	Radio Button	- All - Specified	Yes	This field will appear under the Events section and will be displayed if the admin user has granted the admin_member the right to view events. The user will use this field to select the level of access the admin member being granted access will have to the events. If All is selected, they should have access to view all events. If Specified is selected, the application should present the organisation

Field Number	Field Name	Field Type	Field Data Type		Required?	Field Rules
						admin with the message "You can give them access on the relevant event page".
	Download	Checkbox	-	▲	Yes	This field will appear under Events section. This field will be used by the organisation admin to set if the admin member being set up will be able to download booking information for Events. If this field is checked and they were granted access to specific events, they will only be able to download information for that specific Events.
	Section	Text Field	-	String	N/A	This field will be populated by the application with the section name "Orders".
	Detail	Text Field	-	String	N/A	This field will appear under the Events section. This field will be populated by the application with the text "Orders list and Order pages"
	View	Checkbox	-	▲	Yes	This field will appear under Orders section. This field will be used by the organisation admin to set if the admin member will be able to view the Orders list and Order pages.
	All / Specified	Radio Button	- All - Orders for specified subscriptions or events - None		Yes	This field will be used by the organisation admin to select the access that the admin member will have for orders. All will provide access to All orders. Specified subs and events will provide access to only specific subs and events. None will provide access to no orders.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					If the admin member has been restricted to viewing specified subscriptions and events, the organisation admin will not be able to provide access to all here. Otherwise, all should be selected by default.
	Section	Text Field	- String	N/A	This field will be populated by the application with the section name "Emails".
	Detail	Text Field	- String	N/A	This field will appear under the Events section. This field will be populated by the application with the text "Email lists, Sent and Scheduled Emails"
	View	Checkbox	-	Yes	This field will appear under the Emails section. This field will be used by the organisation admin to set if the admin member will be able to view the email lists, emails sent and scheduled emails.

For each of the sections that the admin member was provided access rights to, the organisation admin should then specify the actions allowed. These will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section	Text Field	String	N/A	This field will be populated by the application with the section name "Organisation Settings".
	Detail	Text Field	String	N/A	This field will appear under the Organisation Settings section. This field will be populated by the application with the text "Organisation Settings"

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Action	Text Field	String	N/A	This field will appear under the Organisation Settings section. This field will be populated by the application with the text "Change Settings"
	Allowed	Multi-Select Checkbox	- Organisation Settings	Yes	This field will contain checkboxes for each of the organisation settings. The organisation admin will check boxes to allow the admin member the ability to change the settings in the organisation settings tab. If no checkboxes are ticked, they admin member should not be granted access to the organisation settings. By default, no checkbox should be ticked.
	Section	Text Field	- String	N/A	This field will be displayed if the admin user was granted access to members. This field will be populated by the application with the section name "Members".
	Detail	Text Field	- String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Individual member pages"
	Action	Text Field	- String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Add

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					member/change member and group details"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to members. This field will be displayed if the admin user was granted access to members This field will be used by the organisation admin to allow the admin user the ability to change member and group details. If unchecked, the admin user should not have the ability to edit these.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Individual member pages"
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Remove Members"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to members. This field will be used by the organisation admin to allow the admin user the ability to remove members. If unchecked, the admin

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					user should not have the ability to remove a member.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Individual member pages"
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to members. This field will appear under the Members section. This field will be populated by the application with the text "Bulk Delete"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to members. This field will be used by the organisation admin to allow the admin user the ability to bulk delete members. If unchecked, the admin user should not have the ability to bulk delete members from the group.
	Section	Text Field	String	N/A	This field will be displayed if the admin user was granted access to members. This field will be populated by the application with the section name "Subscriptions".
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will appear under the Subscriptions section. This field will be populated by the application with the text "Individual member pages"
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section. This field will be populated by the application with the text "Edit/delete subscriptions/form data"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section This field will be used by the organisation admin to allow the admin user the ability to edit or delete subscriptions and subscription form data. If unchecked, the admin user should not have the ability to edit or delete these.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section. This field will be populated by the application with the text "Individual member pages"
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will appear under the Subscriptions section. This field will be populated by the application with the text "Place orders on behalf of members."
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section This field will be used by the organisation admin to allow the admin user the ability to place orders for subscriptions on behalf of a member. If unchecked, the admin user should not have the ability to do this.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section. This field will be populated by the application with the text "Subscriptions list page/individual members"
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Subscriptions section. This field will be populated by the application with the text "Send Renewal Reminders."
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to subscriptions.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will appear under the Subscriptions section This field will be used by the organisation admin to allow the admin user the ability to send renewal reminder emails for subscriptions on behalf of a member. If unchecked, the admin user should not have the ability to send renewal emails.
	Section	Text Field	String	N/A	This field will be displayed if the admin user was granted access to Events. This field will be populated by the application with the section name "Events".
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to events This field will appear under the Events section. This field will be populated by the application with the text "All / Specified Events". If the user was granted access to all events this should be all events, if not it should read specified events.
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Events section. This field will be populated by the application with the text "Create / Edit Events"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Events.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will appear under the Events section This field will be used by the organisation admin to allow the admin user the ability to create or edit events. If unchecked, the admin user should not have the ability to create or edit events.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to events This field will appear under the Events section. This field will be populated by the application with the text "Individual Member Pages".
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Events section. This field will be populated by the application with the text "Book event on members behalf"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Events. This field will appear under the Events section This field will be used by the organisation admin to allow the admin user the ability to book an event on the members behalf. If unchecked, the admin user should not have the ability to book events for members.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to events This field will appear under the Events section. This field will be populated by the application with the text "Event Pages".
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Events section. This field will be populated by the application with the text "Send/schedule emails to participants"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Events. This field will appear under the Events section This field will be used by the organisation admin to allow the admin user the ability to send or schedule emails to event participants. If unchecked, the admin user should not have the ability to send emails to event participants.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to events This field will appear under the Events section. This field will be populated by the application with the text "Event Pages".

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Events section. This field will be populated by the application with the text "Send/schedule emails to participants"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Events. This field will appear under the Events section This field will be used by the organisation admin to allow the admin user the ability to send or schedule emails to event participants. If unchecked, the admin user should not have the ability to send emails to event participants.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to events This field will appear under the Events section. This field will be populated by the application with the text "Event Bookings". If the admin user was given access to all events, they should have access to all event bookings. If they were given access to specific events, they should be given access to the specific event bookings.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to subscriptions. This field will appear under the Events section. This field will be populated by the application with the text "Edit/cancel (inc form data)"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Events. This field will appear under the Events section This field will be used by the organisation admin to allow the admin user the ability to edit event bookings, including the form data. If not, the admin user should not be granted access to do this.
	Section	Text Field	String	N/A	This field will be displayed if the admin user was granted access to Orders. This field will be populated by the application with the section name "Orders".
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to orders. This field will appear under the Orders section. This field will be populated by the application with the text "All / Specified Orders". If the user was granted access to all orders this should be all orders, if not it should read specified orders.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to Orders. This field will appear under the Orders section. This field will be populated by the application with the text "Edit / Cancel Orders"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Orders. This field will appear under the Orders section This field will be used by the organisation admin to allow the admin user the ability to edit or cancel orders. If unchecked, the admin user should not have the ability to edit or cancel orders.
	Detail	Text Field	String	N/A	This field will be displayed if the admin user was granted access to orders. This field will appear under the Orders section. This field will be populated by the application with the text "Individual Order Page".
	Action	Text Field	String	N/A	This field will be displayed if the admin user was granted access to Orders. This field will appear under the Orders section. This field will be populated by the application with the text "Record Orders as Paid / Refunded"
	Allowed	Checkbox		Yes	This field will be displayed if the admin user was granted access to Orders.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will appear under the Orders section
					This field will be used by the organisation admin to allow the admin user the ability to mark an order as paid or refund an order. If unchecked, the admin user should not have the ability to mark an order as paid or refund an order.
	Section	Text Field	String	N/A	This field will be populated by the application with the section name "Lists".
	Detail	Text Field	String	N/A	This field will appear under the Lists section. This field will be populated by the application with the text "Dynamic and Static Lists".
	Action	Text Field	String	N/A	This field will appear under the Lists section. This field will be populated by the application with the text "Create / Edit / Remove"
	Allowed	Checkbox		Yes	This field will appear under the Lists section
					This field will be used by the organisation admin to allow the admin user the ability to create, edit and remove lists. If unchecked, the admin user should not have the ability to create, edit and remove lists.
	Section	Text Field	String	N/A	This field will be populated by the application with the section name "Emails".
	Detail	Text Field	String	N/A	This field will appear under the Emails section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be populated by the application with the text "Emails to members".
	Action	Text Field	String	N/A	This field will appear under the Emails section. This field will be populated by the application with the text "Emails to Members".
	Allowed	Checkbox		Yes	This field will appear under the Emails section This field will be used by the organisation admin to send emails to members. If unchecked, the admin user should not have the ability send emails to members.

If a member is granted super admin rights, they should have full access rights.

Below the section to add an admin user will be a section focused on setting the default reply-to mails. This section will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Email Section Text	Textbox	- String	N/A	This field will be populated by application with the text "The def Reply-To for emails sent by the system is:"
	Order confirmation	Radio Button	- Organisation Email - Admin Emails	Yes	This field will be used by the organisation admin to select the email address that will be the default reply to email for order confirmations.
	Order Status Update	Radio Button	- Organisation Email - Admin Emails	Yes	This field will be used by the organisation admin to select the email address that will be the default reply to email for order status updates.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Subscription Renewal Emails	Radio Button	- Organisation Email - Admin Emails	Yes	This field will be used by the organisation admin to select the email address that will be the default reply to email for subscription renewal emails.
	Event Emails	Radio Button	- Organisation Email - Admin Emails	Yes	This field will be used by the organisation admin to select the email address that will be the default reply to email for event emails.

Below the reply to emails section will be a table detailing the email signatures. There will be a field that allows the organisation admin to select if the admins will have standard signatures. The field will be as follows:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Configure an email signature for each administrator?	Toggle	-	No	This field will be used by organisation admin to select if t want to configure email signatures for the administrators. If the toggle is set to yes, the table of email signatures that have been captured should be displayed.

The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text	String	This column will be populated with the name of the admin user.
Email Address	Text	String	This column will be populated with the email address of the admin user.
Signature	Text	String	This column will be populated with name of the admin user.
Audit Trail	Button		This column a link to the audit trail. Once clicked, the user should be navigated to the audit trail.

Column Name	Column Type	Column Data Type	Column Rules
Actions	Button		This column will contain buttons allowing the user to edit the email signature or delete an email signature. If the edit button is selected, the organisation admin will be presented with a window to edit the signature.

The window to edit the signature will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Signature	Textfield	- String	Yes	This field will be populated by application with the current email signature. This field will be used by the organisation admin to edit the email signature.
	Cancel	Button		N/A	This button will be used by the organisation admin to cancel the email signature edit. Once clicked, the organisation admin will be navigated back to the admin configuration page.
	Confirm	Button		N/A	This button will be used by the organisation admin to confirm the capture of the email signature. Once clicked, the email signature will be saved for the selected administrator and added to the table.

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Below this will be a button to add an email signature once clicked, the organisation admin will be presented with a window to configure the signature. This window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Admin	Drop Down Menu	- Admin Members	Yes	This field will be populated with the names of the admin members who do not yet have an email signature. The organisation admin will use this field to select the admin member for

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					which they want to configure an email signature.
	Signature	Textfield	String	Yes	This field will be used by the organisation admin to capture the email signature.
	Cancel	Button		N/A	This button will be used by the organisation admin to cancel the email signature capture. Once clicked, the organisation admin will be navigated back to the admin configuration page.
	Confirm	Button		N/A	This button will be used by the organisation admin to confirm the capture of the email signature. Once clicked, the email signature will be saved for the selected administrator and added to the table.

Below this will be a section to deal with

Lists

The organisation admin will be navigated to the lists page after clicking on the link in the side menu on the admin home page.

The lists page will consist of the table for static lists and dynamic lists. The tables for the static and dynamic lists will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
List Name	Text	String	This column will be populated with the name of the list.
Create Date	Text	String	This column will be populated with the date that the list was created
Creator	Text	String	This column will be populated with the name of the organisation admin member who created the list.
Is Public	Text	String	This column will be populated with "Yes" if the list is public and "No" if it is not

Column Name	Column Type	Column Data Type	Column Rules
Number	Text	String	This column will have the number of records contain in the list.
Actions	Buttons		This column will contain buttons to Edit, View, Send, Delete, Export CSV and Export PDF. If the edit button is selected, the organisation admin will be navigated to a page where they can edit the list. If the view button is selected, the organisation admin will be navigated to a page where they can view the list. If the send button is selected, the organisation admin will be navigated to the email page to compose an email to the members on the list. If the delete button is selected, the organisation admin will be presented with a confirmation message, once confirmed, the list will be deleted. If the Export CSV or Export PDF button is selected, the list should be exported to the relevant file type and downloaded to the organisation admin's local storage.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Heading Text	Textfield	String	N/A	This field will be populated by application with the text: "This is a report of all the orders that have happened in your organisation. Include in this report:"

Subscription Management

The subscriptions section will be reached by the organisation admin clicking on the navigation menu or on the subscriptions section of the admin home page.

The page will consist of a table detailing the existing subscriptions and a button to create a new subscription.

The table of subscriptions will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text	String	This column will be populated with the name of the subscription that was captured when the organisation admin created the form.
Membership	Text	String	This column will be populated with a "Yes" if the subscription is a membership type subscription and "No" if it is an other type subscription.
Option Name	Text	String	This column will be populated with the name of the pricing option.
Option Price	Text	String	This column will be populated with the price for this pricing option.
Eligibility	Text	String	This column will be populated with the membership types who is eligible for this price option (Individual / Adults / Juniors / Individual in a Group / Group).
Period	Text	String	This column will be populated with the length of time that the subscription is valid for in the format [number] and time period [Year, Month, Week, Day].
Renewal Date	Text	String	This column will be populated with the subscription option that has been configured for the subscription. This will be one of: Subscription anniversary, day-month, Last day of month, Not renewable.
Auto-Renew	Text	String	This should be populated with a "No" if the price option is not set to Auto-Renew and "Yes" if it has. If yes, the column

Column Name	Column Type	Column Data Type	Column Rules
			should also contain the payment methods for which the Auto-Renew is possible.
Form	Text	String	This column will be populated with a "N/A" if there is no form linked to the subscription and a button to view / edit the form if a form has been linked to the subscription. If clicked, the organisation admin should be presented with a window that contains the form fields, allowing them to view it and edit it.
Published	Text	String	This column will be populated with an indicator of whether the subscription type is published to the organisation subscription page.
Action			This column will contain buttons for the organisation admin to edit, archive, and see the audit trail for a subscription type. If edit is clicked, the application should navigate the user to a page where the subscription can be edited. If archive button is clicked, the application should archive the subscription if there is no current subscriptions for all the price options. If there are current subscriptions the button should be greyed out. If the audit trail button is clicked, the organisation administrator will be navigated to the audit trail page.

The table will contain tabs that allows the user to switch between subscriptions that belong to a certain category or view all subscriptions.

Below the table will be a button to create a new subscription type.

Add New Subscription Type

The screen to add a new subscription type will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Name	Text Field	String	Yes	The organisation admin will use this field to capture the name of the subscription type.
	Description	Text Field	String	No	The organisation admin will use this field to create a subscription.
	Membership	Radio	- Provides Membership - Other	Yes	The organisation admin will use this field to indicate if the subscription type provides membership or not.
	If there is a group, who does the membership belong to	Radio	- Individual in the group - The group	Yes	This field will be displayed if the organisation admin selects Other in the membership field.
	Period	Text	String	Yes	This field will be used to indicate the period. By default, 1 will be populated into the field.
	Period	Radio	- Year - Month - Week - Days - Life - No Period - Installments	Yes	This field will be used to set the period for the subscription type. By default, year will be selected.
	Renewals	Radio	- Fixed End Date - On Individual Anniversary - Not renewable	Yes	Default to Fixed End Date
	Published	Radio	- Published - Renewal Only - Unpublished	Yes	Default to Published

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section Heading Text	Text Field	String	N/A	This field will be populated by the application with the following text: "Members"

Add New Subscription Price Option

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Eligibility	Radio	- Individual - Adult - Junior - Family / Individual In a Family - Corporate / Non-Family	Yes	The organistaion admin will use this field to select the eligibility and the price per eligibility.
	Price Options	Radio	- Flat price - Price depends on number of subscriptions - Price depends on custom variable	Yes	This will be used for other type subscriptions. The default will be a flat price. The organisation admin will then also set the price options.
	Price Option Name	Text	String	Yes	Used to select the price option name.
	Published	Radio	- Published - Renewals only - Unpublished	Yes	Used to indicate if the price option is published or not.
	Add Option	Button			This will be used to add another price option.

Pricing for new members

The pricing for new members section will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Enable Rollover Period	Toggle		Yes	This field will be used to determine if a subscription has a rollover period. Default is no.
	Rollover Period	Text	Integer	Yes	This will be used to specify the rollover period in days. Will be prefilled with 60 for year subscriptions and 8 for month subscriptions. This field will be displayed if the indicator was set to yes.
	Enable Pro-Rata Pricing	Toggle			This field will be used to determine if a subscription has pro-rata pricing. Default is no.
	Pro Rata Pricing	Text	String	N/A	TBD

Special Pricing for Renewals

The special pricing for renewals section will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Schedule Late Fees	Toggle		Yes	This field will be used to determine if a subscription has late fees. Default is no.
	Late Fee Option	Radio	- Apply a percentage to all price options from a certain time. - Apply late fees for each price option individually	Yes	This will be used to specify how the late fee will be applied to the price options
	Percentage	Textfield	String	Yes	This field will be displayed If the first option was selected in the late fee option field.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					The organisation admin will use this field to capture the percentage amount.
	Day-Month	Text Field	String	Yes	This field will be displayed If the first option was selected in the late fee option field. The organisation admin will use this field to capture day and month from when the fee should be applied.

If the second option in the late fee option field was selected, the following table will be displayed. This table should be prepopulated with the price options that have been configured for the subscription type:

Column Name	Column Type	Column Data Type	Column Rules
Price Option	Text	String	This column will be populated with the price options configured for this subscription type.
Price	Text	String	This column will be populated with the price configured for this price option.
Renewal Date	Text	String	This column will be populated with the renewal date configured for this subscription type..
Late Fee	Text	String	This column will be populated with the late fee for this price option.
From	Text	String	This column will be populated with the day and month from which the late fee must be charged.
Action	Button		This column will be populated with buttons allowing the organisation admin to edit or delete a late fee. If edit is clicked, the application should allow the organisation admin to edit the fields in the table. If remove is selected, the late fee should be removed from the table.

Auto-Renewal

The auto-renewal section will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Set this subscription type to auto-renew	Toggle		Yes	This field will be used to determine if a subscription can auto-renew. Default is yes.
	Apply to all subscription types	Button			This field will allow the user to set this for all subscription types.
	Payment Method	Toggle		No	This field will be populated with the payment methods that have been configured in the organisation. The user will use the toggle to enable auto-renew for that payment method. The default will be no. except for Opayo.
	Order Expiry	Textfield	String	Yes	This field will be displayed it they payment method has been toggled on. The organisation admin will enter a number of days before expiry that an auto-renew order will be set.

Subscription Forms

If the subscription type is other or it has been configured that membership subscriptions can have a form, this section will be shown.

The section will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Should this subscription type have a form?	Radio Button	- No - Select Existing - Create New	Yes	This field will be used to indicate if a form is required for this subscription. If Create New is selected, the organisation admin will be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					navigated to the form building screen. If Select existing is selected the organisation admin will be able to select an existing form. Default is No.
	Forms	Drop Down	- Forms	Yes	If select existing was selected, this field will be displayed. The organisation admin will select the form they want to link to this subscription type.
	Message	Text Field	String	N/A	If the eligibility for one or more of the price options is Family or Group, the applilcation will populate this field with the text: "Members will only be asked to complete one form per subscription. If you have fields that you want completed for each member, put them in the Membership Form."

At the end of the form creation will be a button to confirm the subscription type. Once clicked, the application will create the subscription and link it to the organisation.

Add / Renew Subscriptions for a Member
The organisation admin will be allowed to renew a subscription on behalf of a member from the member page through clicking a "Renew" button. Once the button is clicked, the following fields will be displayed to the organisation admin:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Warning Message	TextField	String	N/A	If the organisation admin is attempting to renew a subscription that must be manually renewed and is not expired yet, the application will

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					populate this field with the following text:"[concatenate name of current subscription and price option] has an end date of [date]. Once renewed it will have an end date of [date]. Proceed anyway?" If the organisation admin is attempting to renew a subscription that is set to auto-renew, the application will populate this field with the following text:"[concatenate name of current subscription and price option] is scheduled to be automatically renewed on [date] with payment method [Renewal Payment Method]. Proceed anyway?" If the organisation admin is attempting to renew a subscription that has swapping status and a path has not been configured, the application will populate this field with the following text:" [concatenate name of current subscription and price option] will not be renewed. You will need to choose a different subscription in admin checkout.
	Add New	Button		N/A	The organisation admin will use this button to proceed with adding or renewing a subscription status. Once clicked, further fields will be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					displayed to the organisation admin.
	Radio	Radio	- Place admin order (payment method known). - Ask member to complete checkout. - Add paid subscription.	Yes	The application will display this field if the add new button was clicked by the organisation admin. If place admin order is selected the organisation admin will be navigated to the subscriptions page to add the subscription to their cart and perform the admin checkout. If ask member is selected, the organisation admin will be navigated to the subscriptions page to add the subscription to their cart and ask the user to perform the checkout. If add paid subscription is selected, further fields should be displayed to the user.
	Membership / Other	Radio	- Membership - Other	Yes	This field will be used by the organisation admin to select if they want to add a membership or other subscription.
	Subscription Categories	Drop Down	- Categories		This field will be displayed if the organisation has categories. The categories available for selection should based on what was selected in the Membership Other field. The organisation admin will be able to select the category of subscription they want.
	Subscription Types	Drop Down	- Types		The organisation admin will use this field to select the subscription type they want to

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					add. If a category was selected, the types available for selection should be limited to the types linked to that category.
	Subscription Price Options	Drop Down	- Price Options		The organisation admin will use this field to select the subscription price option they want to add. If a type was selected, the price options available for selection should be limited to the price options linked to that type.
	Start Date	Calendar Dropdown	Date		The organisation admin will use this field to specify the start date of the subscription.
	End Date	Calendar Dropdown	Date		If the subscription type has a fixed end date, this field should be populated with the next end date (including rollover period). If the subscription type has a fixed period, this field should be populated with the next end date that meets this period.
	Renewal Payment Method	Drop Down	Admin Payment Methods		This field will be displayed if the subscription is auto-renewable. The organisation admin will select one of the activated payment methods to be used when the subscription gets renewed.
	Add	Button			The organisation admin will use this button to add the subscription to the cart.

If there is a form for the subscription type, it will be displayed to the organisation admin with the form fields pre-filled with the user information where possible.

Bulk Add Subscriptions

The admin user will have the option to bulk add subscriptions, they will be able to download a batch of CSV files for each subscription type and form. The users will fill in the forms and upload them in this section.

The fields on this page will be:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Download	Button		N/A	The organisation admin will click this button to Download Subscription CSV Files. Once clicked, the application will generate the files for each subscription plan and form and download it to the organisation admin's local storage. The forms will be pre-filled with member data. If the organisation does not have subscriptions configured yet a message should be displayed informing the user of this.
	Upload	Button		N/A	This button will be used by the organisation admin to upload the file. Once uploaded, the application should run validations on the file. The organisation admin should be navigated to a screen to fix any errors that has been picked up.

Verifications:

- Compatibility of the data captured in a column (e.g. numbers in a name column), if any are found inform the user.
- If the organisation has been configured for members to only have one subscription at a time, ignore the line and inform the user.

The organisation user should be able to edit the file and submit it once they have addressed the errors picked up by the application. Once they submit it, the application should run the verifications again and if there are still errors, these should be communicated to the user to be addressed before allowing the upload to proceed.

If the verifications pass, the user application should ingest the data in provided in the spreadsheet and create the subscriptions and link them to users. The renewal status for the subscription should be added based on the configuration for that subscription type and price option.

Filters

The organisation admin will be able to filter the subscriptions to match specified criterion. The subscriptions table will consist of the following table:

Column Name	Column Type	Column Data Type	Column Rules
Checkbox	Checkbox		This column will have checkboxes that allow the user to select specific subscriptions to perform actions on.
Type	Text field	String	This column will be populated with the subscription type.
Price Option	Text field	String	This column will be populated with the subscription price option.
Membership	Text field	String	This column will be populated with "Membership" if the subscription is a membership subscription or "Other" if it is not a membership type subscription.
Members	Text field	String	This column will be populated with the number of members who have this subscription price option.
Renewal Status	Text field	String	This column will be populated with the renewal status of the subscription.
Renewal Payment Method	Text field	String	This column will be populated with the renewal payment methods for the subscription type. This will be blank if a subscription is not renewable.
Start Date	Text field	String	This column will be populated with the start date of the subscription.
End Date	Text field	String	This column will be populated with the end date of the subscription.

The filters available to the organisation admin will be:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Filter Section	Textbox	String	N/A	This field will be populated by the application with the text "Subscription Types"
	Current Filter	Textbox	String	N/A	This will appear under the subscription types section. This will be populated with "All" if there is no filter applied or "Filtered by Set" if a filter is applied.
	Membership / Other	Radio	- Membership - Other	No	This will appear under the subscription types section. This field will filter the list of subscriptions by whether it is a membership subscription or other subscription.
	Categories	Multiselect Checkbox	Categories	No	This will appear under the subscription types section. This field will be displayed if categories was selected. This field will filter the list of subscriptions to show subscriptions from the selected categories. Default is All.
	Subscription Type	Multiselect Checkbox	Subscription Types	No	This will appear under the subscription types section. This field will filter the list of subscriptions to show subscription types from the selected categories. Default is All.
	Subscription Price Option	Multiselect Checkbox	Subscription Price Options	No	This will appear under the subscription types section. This field will filter the list of subscriptions to show

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					subscription price options from the selected categories. Default is All.
	Filter Section	Textbox	String	N/A	This field will be populated by the application with the text "Current / Expiry Status"
	Current Filter	Textbox	String	N/A	This will appear under the Current / Expiry Status section. This will be populated with the expiry status that the list is being filtered by.
	Expiry Status	Multi-Select Checkbox	- Current - Recently Expired - Pending orders - Will expire in the next 30 days - Expired - All - Custom	N/A	This will appear under the Current / Expiry Status section. This filter will be used to filter the subscription list by the selected expiry status. By Default, Current, and Recently Expired will be checked.
	Days	Textfield	String	Yes	This will appear under the Current / Expiry Status section. This field will appear if "Will expire in the next 30 days" was selected in the expiry status field. The organisation admin will be allowed to enter the number of days before the expiry date. By default, 30 days will be captured.
	All Subscription that were current on	Calendar Drop Down	Date	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will filter the table to show subscriptions that were current at the date selected.
	All subscriptions that	Radio	- Started - Ended - Were Current	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with During and Ending on to filter the subscriptions that started, ended, and were current in the year or month up to the selected date.
	During the	Radio	- Year - Month	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with During and Ending on to filter the subscriptions that started, ended, and were current in the year or month up to the selected date.
	Ending on	Calendar Drop Down	Date	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with During and Ending on to filter the subscriptions that started, ended, or were current in the year or month up to the selected date.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	All subscriptions that	Radio	- Started - Ended	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with the on/before field to filter the subscriptions that started or ended, before and up to the given date.
	On / Before	Calendar Drop Down	Date	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with the on/before field to filter the subscriptions that started or ended, before and up to the given date.
	All subscriptions that	Radio	- Started - Ended	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with the on/after field to filter the subscriptions that started or ended, on or subsequent to the given date.
	On / After	Calendar Drop Down	Date	No	This will appear under the Current / Expiry Status section. This field will appear if "Custom" was selected in the expiry status field. This field will be used together with the on/after field to filter the subscriptions that started or

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					ended, on or subsequent to the given date.
	Filter Section	Textbox	String	N/A	This field will be populated by the application with the text "Renewal Status"
	Current Filter	Textbox	String	N/A	This will appear under the Renewal Status section. This will be populated with the renewal status that the list is being filtered by.
	Renewal Status	Multi-select Checkbox	- Scheduled to Auto-renew - Manual renew - Pending Order - Swapping - Not renewing	No	This will appear under the Renewal Status section. This filter will be used to filter the subscription list by the selected renewal status. By Default, all the checkboxes with be unchecked.
	Filter Section	Textbox	- String	N/A	This field will be populated by the application with the text "Renewal Payment Method"
	Current Filter	Textbox	- String	N/A	This will appear under the Renewal Payment Method section. This will be populated with All if the list is not filtered or Selected if the list is filtered.
	Renewal Payment Method	Multi-select Checkbox	- Renewal Payment Methods	No	This will appear under the Renewal Payment Method section. This field will be populated with All or the Renewal payment method. This field will filter the subscription list to show subscriptions that have the renewal payment methods selected. By default "All" will be selected.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Filter Section	Textbox	- String	N/A	This field will be populated by the application with the text "Form Data" These fields will only be displayed if the subscriptions in the table have the same subscription forms.
	Current Filter	Textbox	- String	N/A	This will appear under the Form Data section. These fields will only be displayed if the subscriptions in the table have the same subscription forms. This will be populated with Not applicable if there is no form data to filter by or Selected if the list is filtered.
	Form Fields				These fields will be displayed under the Form Data section. These fields will only be displayed if the subscriptions in the table have the same subscription forms. This field will be used to filter the form data by the answers received in the form.

The logic for the filters is that the filter within a section is treated as an OR statement and the filters for different sections is treated as an AND statement.

Once the filtered list is created, the organisation admin will be able to search the list by the columns that are displayed in the list to find particular results. The list should also be sortable by the name column.

The actions that the organisation admin will be able to perform on the filter list will be as follows:

Action	Action Rules
Save Filters	The application will save the list as a dynamic list.

Action	Action Rules
View Settings	The application will display fields allowing the organisation admin to set the view settings for this list. The application will show the list according to the settings.
Save Static Lists	The application will save the list as a static list.
Download	The application will display a window to the organisation admin with the following options: - Members with form data (csv file) - Members and subscriptions with subscription form data (csv file). - Address labels (pdf) - Renewal letters (pdf) Once a selection is made the application will generate the file and download it to the organisation admin's device.
Send Email to List	The application will navigate the organisation admin to the email screen to allow them to compose an email to the members on the list.

The view settings will conist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	View	Radio	- Subscriptions - Members - Members to Email	No	The organisation admin will use this to select what data will be seen in the filtered subscription list. By default, subscription is selected. If Members is selected, further fields will be displayed. If Members to Email is selected, further fields will be displayed.
	Members	Radio	- Covered by - Not covered by	Yes	This field will be displayed if Members was selected in the view field. If Covered by is selected, the list should display the membership list of all the members covered by the

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					subscriptions in the subscription filter list. If Not covered by is selected, the list should display the membership list of all the members not covered by the subscriptions in the subscription filter list.
	Members to Email	Radio	- Single Email Contact for the Subscriptions - All Email Contacts for the Subscription. - Members / Groups who can't be Emailed.	Yes	This field will be displayed if Members to Email was selected in the view field. If Single Email Contact for the Subscriptions was selected, the list should display a membership list with individual members and the email contact member for groups covered by the subscriptions in the subscription filter list. If All Email Contacts for the Subscription is selected, the list should display all individual members and group members who have an email address covered by the subscriptions in the subscription filter list. If Members / Groups who can't be Emailed is selected, the list should display a membership list with Members and Groups who either does not have an email address linked to their profile or their email address is invalid that is covered by the subscriptions in the subscription filter list.

Member Management

The organisation admin will be navigated to the members page by clicking on the member section of the admin home page or clicking on the link for members in the side navigation menu on the admin home page.

The member management page will consist of buttons to add members, import members, filter member list, and search for members.

The member page will contain a table that will consist of the following:

Column Name	Column Type	Column Data Type	Column Rules
Checkbox	Checkbox		This column will have checkboxes that allow the user to select specific members to perform actions on.
Name	Text Field	String	This column will contain the first name and surname of the member.
Membership	Text Field	String	This column will contain "Current Member" if they have an active membership subscription, "Lapsed Member" if they have an expired membership subscription and "Non-Member" if they do not have a membership subscription.
Number of current subscriptions	Text Field	String	This column will contain the number of active subscriptions the member has.
Warnings	Text Field	String	This will be a text link, which when clicked, will navigate the organisation admin to the warnings page to see the warnings for that user.

The organisation admin will have the option to display further columns in addition to the default columns that appear in the in table. These columns will be:

Column Name	Column Type	Column Data Type	Column Rules
Group Name	Text Field	String	This column will contain the name of the group the member is in. It will be blank if the member is not in a group. This will

Column Name	Column Type	Column Data Type	Column Rules
			be displayed when they elect to show each member of the group.
Designation	Text Field	String	This will be populated with Adult or Junior. This will be displayed when they elect to show each member of the group.
Membership Number	Text Field	String	This column will contain the membership number. This will be displayed when they elect to show membership numbers.
Postcode	Text Field	String	This column will contain the postcode of the members default address. This will be displayed when they elect to show member postcodes.
Email Address	Text Field	String	This column will contain the primary email address of the member. This should only be allowed to be displayed when they elect to show each member of the group.
Membership Form Fields	Text Fields	String	The organisation admin will be able to select specific fields from the membership forms. Each of the selected fields will then be displayed as a column in the table.
Event Participants (Out of Scope)	Text Fields	String	This option will be available if they have elected to show individuals within a group. The user will be allowed to select a specific event and a specific session if the event is re-occurring. The event will be a column heading. The column will be populated with Paid, Unpaid, Waiting List, or Expressed Interest depending on the order status. The word should be clickable. Once clicked, the organisation admin should be navigated to the order page for the event booking.
Subscriptions	Text Fields	String	If this option is selected, the organisation admin will have the ability

Column Name	Column Type	Column Data Type	Column Rules
			to select subscription name, assigned to, start date, end date and renewal status. Each selected field will be displayed as a column.

Add Members

The page to add members will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Type	Radio	Individual Company / Association	Yes	The organisation admin will use this field to select the type of user that they are creating.
	Standard fields for members				The standard fields for the member based on the member type above will be displayed for the organisation admin user to capture.
	Create Group	Button			This button will be displayed if the user being created is an individual. The organisation admin will use this button if they wish to create a group for the user. If this button is clicked, the create group fields are displayed.
	Assign to Group	Button			This button will be displayed if the user being created is an individual. The organisation admin will use this button if they wish to add the user to a group. If this button is clicked, the assign to group fields is displayed.

Create Group

The create group fields will consist of:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Group Name	Text	String	Yes	This field will be used to capture the group name. It should be pre-filled with the member surname.
	Member Type	Radio	- Junior - Adult	Yes	This field will be used by the organisation administrator to indicate if the individual user is a junior or adult.
	Family Admin	Checkbox		Yes	This field will be used by the organisation administrator to indicate if the individual user is the family admin. If the member is a junior, a warning message should be presented informing the organisation administrator that they will be making a junior a family admin. By default, this field will be checked.
	Email Contact	Checkbox		Yes	This field will be used to indicate that the user is the email contact. If the user is the admin this field should be checked by default. If the user is not the family admin, this box should be unchecked by default.
	Add Members to Group	Button			This button will be used to add more members to the group. Once clicked, the user will be navigated to the standard fields and form fields for the additional members. Once complete, the organisation admin will be directed to the group page for the group.

Assign to Group

The assign to group page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Search	SearchBox	String	Yes	This field will be used to search for a group name. The application will provide the search results and once a search result is clicked on, the fields below.
	Member Type	Radio	- Junior Adult	Yes	This field will be used by the organisation administrator to indicate if the individual user is a junior or adult.
	Family Admin	Checkbox		Yes	This field will be used by the organisation administrator to indicate if the individual user is the family admin. If the member is a junior, a warning message should be presented informing the organisation administrator that they will be making a junior a family admin. By default, this field will be checked.
	Email Contact	Checkbox		Yes	This field will be used to indicate that the user is the email contact. If the user is the admin this field should be checked by default. If the user is not the family admin, this box should be unchecked by default.
	Add Members to Group	Button			This button will be used to add more members to the group. Once clicked, the user will be navigated to the standard fields and form fields for the

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					additional members. Once complete, the organisation admin will be directed to the group page for the group.

Importing Members

The organisation admin user will have the option to bulk import members. They will be able to download a CSV file containing columns related to the membership details. The organisation admin will fill in the CSV file and upload it.

The fields on this page will be:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Download	Button		N/A	The organisation admin will click this button to Download Membership CSV Files. Once clicked, the application will generate the file membership details and download it to the organisation admin's local storage.
	Upload	Button		N/A	This button will be used by the organisation admin to upload the file. Once uploaded, the application should run validations on the file. The organisation admin should be navigated to a screen to fix any errors that has been picked up.

Verifications:

- Compatibility of the data captured in a column (e.g. numbers in a name column), if any are found inform the user.
- If there is duplicate entries in the file, if any are found, inform the user.

The organisation admin should be able to edit the file and submit it once they have addressed the errors picked up by the application. Once they submit it, the application should run the verifications again and if there are still errors, these should be communicated to the user to be addressed before allowing the upload to proceed.

If the verifications pass, the user application should ingest the data in provided in the spreadsheet and create the members and groups and link them to the organisation.

Remove Members

If the organisation admin tries to remove the member. The application will perform validations. The validations will be:

- To check that the member does not have active subscriptions. If they do, the application should generate a warning message and ask the user to confirm.
- To check that the member does not have pending orders. If they do, the application should generate a warning message and not allow the user to proceed.
- To check that the member has any event bookings for future events (Out of Scope). If they do, the application should generate a warning message and not allow the user to proceed.
- To check that the member has any resource bookings for future events (Out of Scope). If they do, the application should generate a warning message and not allow the user to proceed.

The remove members page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Member records text	Textbox	String	N/A	This field will be populated by the application with the text "The member's personal information and membership form data will be deleted. The subscriptions, event bookings, orders and communications relating to the member will be retained and archived. If you choose to delete all information about the member, their name will be removed from those records and replaced with "Member deleted" and all form data will be removed."
	Member Records	Radio	- Retain information about the	Yes	This field will be used to indicate what should happen with the member records.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			member for your records. - Delete all information about the member.		If the organisation administrator chooses to retain the information, the subscriptions, event bookings, orders and communications should be archived. If the organisation administrator chooses to delete the information, the member information should be deleted.

Filters

The filters functionality will provide a range of filters that the organisation admin can use to filter down the list of members to a criterion that they can then use to create a list or perform actions on the list.

The filters available to the organisation admin user will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Filter Section	Textbox	String	N/A	This field will be populated by the application with the text "Personal Details"
	Age	Radio Button	- Adult - Junior - Show All		This field will appear in the "Personal Details" section. This will filter the member list to show only Juniors or Adults or show all. By default, show all will be selected.
	Email Valid	Radio Button	- Yes - No - Show All		This field will appear in the "Personal Details" section. This will filter the member list by whether the email address for the member is valid or not or show all. By default, show all will be selected.
	Mobile Phone	Radio Button	- Has - Doesn't have		This field will appear in the "Personal Details" section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			- Show All		This filter will only be displayed if the organisation has asked for a phone number. This will filter the member list by whether they have provided a phone number, have not provided one or show all. By Default, show all will be selected.
	Account Created Between	Calendar Drop Down	Dates		This field will appear in the "Personal Details" section. This will filter the member list to show members who created their account between the two provided dates.
	Has Signed In	Radio Button	- Yes - No - Show All		This field will appear in the "Personal Details" section. This will filter the member list to show members that have signed in, have not signed in or show all. By default, show all will be selected.
	Group	Radio Button	- Show All - In a Group - Not in a Group - Group Admin - Email Contact		This field will appear in the "Personal Details" section. This will filter the member list to show members who are in a group, are not in a group, are group admins, are the email contact for their group, or show all. By default, show all will be selected.
	Filter Section	Textbox	- String	N/A	This field will be populated by the application with the text "Membership Form"
	Membership Fields	Radio	- Answers - Not Completed		This field will appear under the Membership Section. This will be populated will fields from the membership

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					forms and can be used to filter the membership list based on their answers to the questions.
	Membership Date Fields	Calendar Drop Down	Date		This field will appear under the membership section. This will filter to show members whose answers to date-related questions fall between the two provided dates.
	Number Fields	TextFields	String		This field will appear under the membership section. This will filter to show members whose answers to a number field fall between the two provided numbers
	Filter Section	Textbox	String	N/A	This field will be populated by the application with the text "Membership / Subscription"
	Membership	Multi-select checkbox	- Current Members - Lapsed Members - Non-Members		This field will appear under the membership / subscription section. This field will filter the members list to show members who have a current membership subscription, members who have an expired membership subscription, people who did not have a membership subscription.
	Expiring soon	Drop Down	- Annual - Monthly		This field will appear under the membership / subscription section. This field will be used to filter the field by annual or monthly subscriptions that are expiring soon. If this field is selected, the application will generate fields to allow the organisation

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					admin to specify the number of days before the expiry date. By default, it will be 60 for annual and 8 for monthly.
	Renewal Status	Multi-select checkbox	- Scheduled to Auto-renew - Renewable (not auto-renew) - Pending Order - Not Renewing - Add already renewed		This field will appear under the membership / subscription section. This field will be displayed if the Expiring Soon filter was used. This filter will filter members in the list by the renewal status of their subscriptions. By Default, the first 4 will be checked.
	Recently Expired	Drop Down	- Annual - Monthly		This field will appear under the membership / subscription section. This field will be used to filter the field by annual or monthly subscriptions that have recently expired. If this field is selected, the application will generate fields to allow the organisation admin to specify the number of days after the expiry date. By default, it will be 60 for annual and 8 for monthly.
	Renewal Status	Multi-select checkbox	- Scheduled to Auto-renew - Renewable (not auto-renew) - Pending Order - Not Renewing		This field will appear under the membership / subscription section. This field will be displayed if the Recently Expired filter was used. This filter will filter members in the list by the renewal status of their subscriptions.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			- Add already renewed		By Default, the first 3 will be checked.
	Subscription Type	Drop Down Menu	- Subscription Types		This field will appear under the membership / subscription section. This filter will filter the member list by members who have the selected subscription type.
	Subscription Price Option	Multi-Select Checkbox	- Price Options		This field will appear under the membership / subscription section. This field will be displayed if the subscription type is displayed. This filter will filter the member list by members who have the selected price options.
	Members who had a subscription on	Calendar Drop Down	Date		This field will appear under the membership / subscription section. This field will filter the members in the list to show members who had an active subscription on the selected date.
	Members who have joined since	Calendar Drop Down	Date		This field will appear under the membership / subscription section. This field will filter the members in the list to show members who had a subscription (active or expired) whose start date was after the specified date.
	Most recent payment method used for subscription	Multi-Select Checkbox	- Payment Methods		This field will appear under the membership / subscription section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will filter the members list to show the members who paid for a membership subscription with the selected payment methods.
	Filter Section	Textbox	- String	N/A	This field will be populated by the application with the text "Event Participants". (Out of scope)
	Event Category	Dropdown Menu	- Event Categories		This field will appear under the Event participants section. This field will be displayed if event categories have been configured and will filter the list to members who attended events in that category (out of scope)
	Event	Dropdown Menu	- Events		This field will appear under the Event participants section. If an event category has been selected, the drop-down menu should show events that were assigned to that category. This field will filter the member list to show the members who attended the event selected.
	Sessions	Multiselect Checkbox	- Sessions		This field will appear under the Event participants section. This field will be displayed if the selected event had multiple sessions. This field will filter the member list to show the members who attended the selected sessions of the selected event.

The logic for the filters is that the filter within a section is treated as an OR statement and the filters for different sections is treated as an AND statement.

Once the filtered list is created, the organisation admin will be able to search the list by the columns that are displayed in the list to find particular results. The list should also be sortable by the name column.

The actions that the organisation admin will be able to perform on the filter list will be as follows:

Action	Action Rules
Send Email	The application will navigate the organisation admin to the email screen to allow them to compose an email to the members on the list.
Save as a List	The application will display a window to the organisation admin that will allow them to name the list and select the list to be a static or dynamic list.
Download	The application will display a window to the organisation admin with the following options: - Members with form data (csv file) - Members and subscriptions with subscription form data (csv file). - Address labels (pdf) - Renewal letters (pdf) Once a selection is made the application will generate the file and download it to the organisation admin's device.
Groups	For groups the group administrator should be asked if they want to choose: - Just the Email Contact(s) (default for action: send email) - Single managing member (default for download – if they select download members and subs, all subscriptions for that group should be listed with that member's details) - Just the Group Administrators (if downloading, and they select download members and subs, group subscriptions and subscriptions assigned to non-group administrators should be included, but only be listed once against one group administrator) - All members of the Group (if downloading, and they select download members and subs, group subscriptions should only be listed once against one member of the group)

Merge Members

The organization admin will have the ability to merge member profiles where a member has multiple profiles with an organization. The organisation admin will be able to perform this from the member profile. When they click the merge button, they will be presented with a window allowing them to select the profile they wish to merge by searching for it.

Once the profile has been selected, the application will display the profiles next to each other and the organisation admin user will be able to click a button to indicate the profile they wish to keep.

Once they do this the application will display a warning message stating that memberships, subscriptions, event bookings, audit trail, and form data will be transferred to the profile that is being kept and everything else from the other profile will be deleted.

Members who did not complete checkout

When a user account is created, form data is completed but the checkout process was not completed, the user will be linked to the organisation. This will create a warning to the organisation admin to inform them that the user will linked to the organisation as a non-member because they did not complete the checkout process.

Orders Management

Orders

The admins will be able to view orders page once they click on the view button of the orders section of the admin home page or click on the orders link in the side menu.

Overview

At the top of the orders page, will be a text field that will read "Orders in the last [textfield] days. By default, the textfield will be prepopulated with 30 but the organisation admin can enter a number of days that will determine the number of orders placed in the overview table.

The overview table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Current Status	Text Field	String	This column will contain the order statuses with one status per row.
Direct Debit	Text Field	String	This column will be displayed if the organisation has the direct debit payment method activated and will contain the number of orders per status that was paid for by direct debit payment method.
Card	Text Field	String	This column will be displayed if the organisation has the card payment method activated and will contain the

Column Name	Column Type	Column Data Type	Column Rules
			number of orders per status that was paid for by card payment method.
Paypal	Text Field	String	This column will be displayed if the organisation has the Paypal payment method activated and will contain the number of orders per status that was paid for by Paypal payment method.
Bank Transfer	Text Field	String	This column will be displayed if the organisation has the Bank Transfer payment method activated and will contain the number of orders per status that was paid for by Bank Transfer payment method.
Cheque	Text Field	String	This column will be displayed if the organisation has the Cheque payment method activated and will contain the number of orders per status that was paid for by Cheque payment method.
No Payment Required	Text Field	String	This column will contain the number of orders per status that did not require a payment.
Total	Text Field	String	This column will be populated with the total number of orders across all payment methods for each order status.

The final two rows of the table will be total orders for each payment method across all payment statuses and number of discounts for each payment method across all payment statuses.

Actions

The actions page will consist of the fields at the top of page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Orders where member needs to make payment	Textbox	String	N/A	This field will be populated with the number of orders that have a status of "Order Placed".
	Orders requiring refund to be made:				This field will be populated with the number of orders that have

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					the status "Cancelled – Refund Due"
	Payment problem orders				his field will be populated with the number of orders that have the status "Payment Problem".

Below this will be tables with further details of the orders shown in these fields. The table for orders where a member needs to make a payment will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Checkbox	Checkbox		This column will contain checkboxes to select specific orders to apply an action to. If the checkbox in the column heading row is selected, the action will be applied to all orders.
Order	Text Field	String	This column will be populated by the order number. The text should be clickable and navigate the organisation admin to the order page for the order once clicked.
Purchaser	Text Field	String	This column will be populated by the name of the purchaser. The text should be clickable and navigate the organisation admin to the member page for that member.
Total	Text Field	String	This column will be populated by the total of the order including VAT.
Order Placed	Text Field	String	This column will be populated by the date that the order was placed.
Payment Method	Text Field	String	This column will be populated by the payment method that was used to pay for the order.
Reminder Email Last Sent	Text Field	String	This column will be populated with the date that the last reminder email was sent to the member. If an email has not been sent to the user, this should be left blank.

Above table will be a button to send the member a reminder email and to view the email template. Once the button for sending the reminder email is clicked, the application will generate the reminder email to each of the members in the table who were checked using the checkbox. If no members were checked, the user should not be allowed to click the button.

The table for orders where a refund is required will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Order	Text Field	String	This column will be populated by the order number. The text should be clickable and navigate the organisation admin to the order page for the order once clicked.
Purchaser	Text Field	String	This column will be populated by the name of the purchaser. The text should be clickable and navigate the organisation admin to the member page for that member.
Total	Text Field	String	This column will be populated by the total of the order including VAT.
Order Placed	Text Field	String	This column will be populated by the date that the order was placed.
Payment Method	Text Field	String	This column will be populated by the payment method that was used to pay for the order.

The table for orders that encountered a payment problem will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Order	Text Field	String	This column will be populated by the order number. The text should be clickable and navigate the organisation admin to the order page for the order once clicked.
Purchaser	Text Field	String	This column will be populated by the name of the purchaser. The text should be clickable and navigate the organisation admin to the member page for that member.

Column Name	Column Type	Column Data Type	Column Rules
Total	Text Field	String	This column will be populated by the total of the order including VAT.
Order Placed	Text Field	String	This column will be populated by the date that the order was placed.
Payment Method	Text Field	String	This column will be populated by the payment method that was used to pay for the order.
Action	Buttons		This column will contain buttons for the organisation admin to cancel an order or retry a payment. For GoCardles Orders, the retry button should only be available to organisation admins whose organisation has the retry facility enabled. If cancel is selected, the order status should be switched to one of the cancelled statuses. If the retry button is clicked, an API call is triggered to attempt to retry the payment.

Orders List

On the orders list section of the orders page will have a table displaying the orders for the organisation. The organisation admin will be able to sort the table, search the table to find a specific order, filter the order list to show orders that meet that criterion, send email reminders to selected orders and download orders.

The table of orders will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Checkbox	Checkbox		This column will contain checkboxes allowing the organisation admin to select specific orders to perform actions on. The heading column will contain a checkbox that allows the organisation admin to select all the orders.

Column Name	Column Type	Column Data Type	Column Rules
Order Number	Text Field	String	This column will be populated by the order number. The text should be clickable and navigate the organisation admin to the order page for the order once clicked.
Order Placed	Text Field	String	This column will be populated by the date that the order was placed.
Purchaser	Text Field	String	This column will be populated by the name of the purchaser. The text should be clickable and navigate the organisation admin to the member page for that member.
Order Total	Text Field	String	This column will be populated with the current order total inclusive of VAT.
Payment Method	Text Field	String	This column will be populated by the payment method that was used to pay for the order and will contain "None" if no payment is required.
Current Status	Text Field	String	This column will contain the current status of the order.

The organisation admin will be able to filter the list of orders with the following filters:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Section Heading	Text Field	String	N/A	This field will be populated by the application with the text "Order Status"
	Unpaid Orders	Button			This button will appear under the Order Status section. Clicking this button will filter the orders in the order table to orders with the status "Order Placed" and "Cancelled – Pending Payment".
	Paid Orders	Button			This button will appear under the Order Status section. Clicking this button will filter

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					the orders in the order table to orders with the status "Payment Received" and "Payment Transferred".
	Cancelled	Button			This button will appear under the Order Status section. Clicking this button will filter the orders in the order table to orders with the status Cancelled and Partially Cancelled.
	Filter By Order Status	Multi-Select Checkbox	- Order Statuses	No	This field will appear under the Order Status Section. The organisation admin will be able to filter further on the order status in this field.
	Check All	Button			This button will appear under the Order Status section. The organisation admin will use this button to select all the statuses.
	Clear All	Button			This button will appear under the Order Status section. The organisation admin will use this button to clear all the selected statuses.
	Section Heading	Text Field	String	N/A	This field will be populated by the application with the text "Payment Methods"
	Automatic Payment Methods	Button			This button will appear under the Payment Methods section. Clicking this button will filter the orders in the order table to orders with the Payment Method "Card". "PayPal", and "GoCardless"
	Non automatic payment methods	Button			This button will appear under the Payment Methods section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					Clicking this button will filter the orders in the order table to orders with all the Payment Methods except for "Card". "PayPal", and "GoCardless"
	Free orders	Button			This button will appear under the Payment Methods section. Clicking this button will filter the orders in the order table to orders with no payment method.
	Admin only payment methods	Button			This button will appear under the Payment Methods section. Clicking this button will filter the orders in the order table to orders with payment methods that have been configured for organisation administrators only.
	Filter by Payment Method	Multi-Select Checkbox	- Payment Methods	No	This field will appear under the Payment Methods section. The organisation admin will be able to filter further on the Payment methods in this field.
	Check All	Button			This button will appear under the Payment Methods section. The organisation admin will use this button to select all the payment methods.
	Clear All	Button			This button will appear under the Payment Methods section. The organisation admin will use this button to clear all the selected payment methods.
	Section Heading	Text Field	String	N/A	This field will be populated by the application with the text "Order Dates"

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Between (Start Date)	Calendar Drop Down	Date	No	This field will appear under the Order Dates section. The organisation admin will use this field to select the start date of the date range. This will filter the orders in the order list to show orders that were placed after this date.
	And (End Date)	Calendar Drop Down	Date	No	This field will appear under the Order Dates section. The organisation admin will use this field to select the end date of the date range. This will filter the orders in the order list to show orders that were placed up to this date.
	Section Heading	Text Field	String	N/A	This field will be populated by the application with the text "Items Purchased"
	Item Type	Multi-checklist	- Subscriptions - Event Bookings	No	This field will appear under the Items Purchased section. This field will allow the organisation admin to filter the orders in the order list to those orders that have ordered a subscription or event.
	Membership	Multi-checklist	- Membership - Other	No	This field will appear under the Items Purchased section. This field will be displayed if subscriptions was selected in the item type field. This field will be used to filter the orders in the order page to membership subscriptions or other subscriptions.
	Subscription Categories	Multi-checklist	- Subscription Categories	No	This field will appear under the Items Purchased section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be displayed if subscriptions was selected in the item type field. This field will be displayed if the organisation has subscription categories configured. This field will be used to filter the orders in the order list to those that have a subscription in the selected category as a line item.
	Subscription Types	Multi-checklist	- Subscription Types	No	This field will appear under the Items Purchased section. This field will be displayed if subscriptions was selected in the item type field. This field will be used to filter the orders in the order list to those that have the selected subscription type as a line item.
	Subscription Price Options	Multi-checklist	- Subscription Price Options	No	This field will appear under the Items Purchased section. This field will be displayed if subscriptions was selected in the item type field. This field will be used to filter the orders in the order list to those that have the selected subscription price options as a line item.
	Event Categories	Multi-checklist	- Event Categories	No	This field will appear under the Items Purchased section. This field will be displayed if Event Bookings was selected in the item type field.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be displayed if the organisation has event categories configured. This field will be used to filter the orders in the order list to those that have an event booking in the selected category as a line item.
	Events	Multi-checklist	- Events	No	This field will appear under the Items Purchased section. This field will be displayed if Event Bookings was selected in the item type field. The events available for selection will be those that are linked to the category selected. This field will be used to filter the orders in the order list to those that have a booking for the selected events as a line item.
	Sessions	Multi-checklist	- Sessions	No	This field will appear under the Items Purchased section. This field will be displayed if Event Bookings was selected in the item type field. This field will be displayed if the events selected in the events field, are recurring events. This field will filter the orders in the order list to orders that have a booking for the selected sessions.
	Price Options	Multi-checklist	- Sessions	No	This field will appear under the Items Purchased section.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					This field will be displayed if Event Bookings was selected in the item type field. This field will be used to filter the orders in the order page to orders that has the specific price option selected as a line item.
	Filter	Button			This button will be used to filter the order list based on the selected criteria from the fields above. Once clicked, the order list should be filtered.
	Clear Filter	Button			This button will be used to clear the filter. Once clicked, all filters should be unselected and the order list unfiltered.
	Save Filter	Button			This button will save the filter, the application will keep the filters in this state when the organisation admin visits the page again.

The organisation admin will further be allowed to perform the following actions on the order list:

Action	Action Rules
Download Orders	The application will generate a csv file with the following columns: - Order number - Placed Date - Purchaser - Order Total (incl. tax) - Discount (incl. tax) - Payment Method - Current Status - Payment Received Date - Payment Transferred Date - Refunded

Action	Action Rules
Download Order Items	The application will generate a csv file with the same columns as above as well as the following columns: - Item - Event Booking - Discount - Price (incl. Tax) Where an order has multiple line items, display one per row, with the columns that are also in the download orders csv repeated.
Send Payment Reminder	The application will navigate users to the actions required section of orders.

Warnings

The warnings section of the order page will contain warnings related to orders to inform organisation admins of issues. For orders, the warnings will be:

Warning	Message
Payment Problem	Order [number] has been updated to status Payment Problem
Payment Problem	[purchaser name] did not complete checkout at [date-time] because they had a payment problem with [payment method]. Their order was not completed.
Late Payments	Order [number] has been unpaid for more than [30] days.
Member Request	The purchaser for order [number] has requested a cancellation
Partial Payment Mismatch	Order [number] was updated to status Payment Received and the Account Balance has been updated because the system received notification that the payment amount was different to that recorded.
GoCardless payment taken and order was on Cancelled – Before Payment:	Order [number] has been updated from Cancelled – Before Payment to Cancelled – Refund Due because the payment was taken from the member.

Order Page

The organisation admin will be navigated to the order page when clicking on the order number in the orders page on the admin portal. This page will contain details for a specific order.

Summary

The summary will consist of a table with the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Order Number	Textfield	String	This column will be populated with the order number.
Placed	Textfield	String	This column will be populated with the date that the order was placed.
Purchaser	Textfield	String	This column will be populated with the name of the purchaser.
Order Total	Textfield	String	This column will be populated with the total, including tax of the order.
Current Status	Textfield	String	This column will be populated with the current order status.

Order Items

The order items will consist of a view that shows the line items of the order. The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Item	Textfield	String	This column will be populated with [Subscription type – Price Option for Member / Group Name] for subscriptions and [Event name – Session start date/time – Price option] for [Member name] for events.
Form	Textfield	String	A link to view or edit the form if a form is linked to the line item.
Tax	Textfield	String	The amount of tax charged on the line item.
Price	Textfield	String	The price including tax of the line item.

The first row beneath the final line item will contain the sub-total, tax sub-total and sum of the prices for the line item.

The row beneath that will contain a discount code, tax on the discount, tax inclusive amount of the discount

The row beneath that will contain price adjustment, tax, and tax inclusive amount of the price adjustment, if a price adjustment was applied during admin checkout.

The row beneath that will contain total and [sub-total + discount + price adjustment]

The final row will contain Tax included and the total including tax

Payment

The payment details. The payment details will appear underneath the summary page with the payment method, payment status, payment details, refund details and bill and mandate references for GoCardless Payments.

Order Emails

The order emails section will contain the emails that was sent to the member related to the order. The tables columns will consist of:

Column Name	Column Type	Column Data Type	Column Rules
Date	Textfield	String	This column will be populated with the date that the order was placed.
Template	Textfield	String	This column will be populated with the template name. If a custom name was sent this column will be populated with "Custom"
Received	Textfield	String	This column will be populated with a "Yes" if the email was delivered to the member and "No" if it was not.
Opened	Textfield	String	This column will be populated with a "Yes" if the email was opened by the member and "No" if it was not.
Resend	Link		This column will contain a link allowing the organisation admin to resend an email. If an order confirmation email is resent, the email should be updated with the current order status, bank transfer/cheque payment instructions if the order was paid for, and details of changes to the order if it has been changed. If the order status has changed, since the email was sent, the email should not be allowed to be resent.

Below the table will be a button to send a custom email. If this button is clicked, the organisation admin will be navigated to the page for constructing an email with the following fields auto populated:

Field	Auto-populated Content
To	Member Email
Subject	Re: Order [order number]
Body	Dear [member first name] Customisable text goes here. Order Details Order number: [number] Date placed: [date] Payment method: [payment method] Current order status: [order status]

Account Balance

The account balance field will be at the top right of the page and will contain the text "Funds on account:" followed by the amount. If funds are owed to the member, the amount will be positive. If funds are owed to the organisation by the member, the amount will be negative. The amount will be clickable and once clicked, will take the organisation admin to the account balance page for the member.

Communications

The organisation admins will be able to compose email messages with the use of tags that can be used in ad-hoc communication, saved as drafts for future communications, generate email recipient lists through the use of filters and define reply to addresses.

The email page will consist of a table with previously sent emails. This table will consist of the following tables:

Column Name	Column Type	Column Data Type	Column Rules
Sent On	Text Field	String	This column will contain the date that the email was sent.
Subject	Text Field	String	This column will contain the subject of the email.
Recipients	Text Field	String	This column will contain the number of recipients that the email was sent to.

Column Name	Column Type	Column Data Type	Column Rules
Received	Text Field	String	This column will contain the number of recipients who received the email.
Opened	Text Field	String	This column will contain the number of recipients that opened the email.
Actions	Buttons		This column will contain buttons for the organisation admin to view or edit the email. If the view button is clicked, a window showing the email will be displayed to the organisation admin. If the edit button is clicked, the organisation admin will be navigated to the window where the email can be edited and sent again.

Below this will be a table showing the templates that have been previously created.

Column Name	Column Type	Column Data Type	Column Rules
Name	Text Field	String	This column will contain the name of the template.
Created On	Text Field	String	This column will contain the date that the template was created on.
Last Used	Text Field	String	This column will contain the date that the template was last used.
Subject	Text Field	String	This column will contain the subject of the template.
Actions	Buttons		This column will contain buttons to view, edit, or remove the template. If the view button is clicked, a window showing the email will be displayed to the organisation admin. If the edit button is clicked, the organisation admin will be navigated to the window where the email can be edited and sent again.

Column Name	Column Type	Column Data Type	Column Rules
			If the remove button is clicked, the application will delete the email template.

At the top of the page will be a button to create a new email. Once clicked, the user will be navigated to a page where they can compose the email and send it. The page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	From	Textbox	String	Yes	This field will be populated with the organisation email. (org shortname@membidomain.com)
	Reply to	Textbox	String	Yes	This field will be populated with the email of the organisation admin member sending the email.
	To	Textbox	String	Yes	The organisation admin will use this field to search for member or group names for whom they wish to send the email. If a list was selected as the recipient the list name should appear.
	Subject	Textbox	String	Yes	The organisation admin will use this field to capture the subject of the email.
	Email Body	Textbox	String	Yes	The organisation admin will use this field to capture the body of the email.
	Add Recipients From	Drop Down Menu	- Lists		The organisation admin will use this field to select a list of members that they want to send an email to.
	Add Attachment	Button			The organisation admin will use this field to add an attachment to the email. Once clicked, the application will open a folder window allowing them to select a file for attachment. The

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					attachment will have a 10 MB size limit.
	Save as Template	Button			The organisation admin will use this field to save the email as a template. Once clicked, the application will generate a window allowing the user to capture a name for the template and save the template and add it to the template table.
	Send	Button			This button will be used to send the mail to the recipients. Once clicked, the application will validate that the fields have been captured and send the email if the validation passes. If the validation fails, the application will present a message to the organisation admin informing them of this.
	Preview	Button			This button will be used to see a preview of the email. Once the button is clicked, the application will open a window to show the organisation admin a preview of what the email will look like.

This screen should also contain a table showing the tags that an organisation administrator can utilize in the email body as an example of what data the tag will pull into the email once it is sent.

Audit Trail

The application will have an audit trail that is viewable by the organization administrators for actions performed by admin, members, users and actions performed by the application. Each section will have an audit trail and there will be an overall audit trail for everything. The UI for the audit trail is out of scope for the beta release.

~~Shop Management (Out of Scope)~~

~~The shop management component of the application will allow organisations admins to create listings of their organisation's products, manage the stock levels for each listing and make them available for sale.~~

~~Gallery (Out of Scope)~~

~~The gallery will contain images that have been uploaded by the organisation admins. They will be allowed to re-use these images when creating new events etc.~~

~~Individual~~ Organisation Members / User~~s~~

My Home

~~The user home page will consist of collapsible sections that can be expanded to see more information. The sections will consist of:~~ The "My Home" page will be the page that the user is directed to once they sign in to Membi. On the "My Home" page, they will see a view of their organisations, events, orders, subscriptions etc. and be able to access their organisations.

This page will consist of unexpanded sections that contain some information and allows the user to click into the section to see further information.

The unexpanded sections will consist of:

Section Name	Individuals	Group Members
My Organisations	This section will have information on the organisations that they have joined or been added to by the admin of that organisation. This will consist of the organisation name, the date they have been a member from and their role in the organisation.	Group members will be able to see the organisations that the group has joined or been added to by the admin of that organisation. This will consist of the organisation name, the date they have been a member from and their role in the organisation.
Events	This section will contain information on upcoming events from that the user has made bookings for. It will have the organisation, event date and time, event title.	Group admins will be able to see event information for bookings that the group members have made in addition to their own. Non-Admin members will be able to see information on bookings they have made or have been made for them by the group admin.
Subscriptions	This section will contain information on the subscriptions that they have purchased or have been purchased for them by the admin of an organisation. This will consist of the subscription type, the price option and the expiry date.	Group admins will be able to see the subscriptions for their group members that they have purchased. Non-admin members will be able to see the group subscriptions that have been purchased for them. This will consist of the subscription type, the price option and the expiry date.
Orders	This section will contain the three most recent orders the member has made. This will consist of the order number, date, number of events, number of subscriptions, order total, and current order status.	Group Admins will see the orders for the group. Non-admin members will see their own orders and orders that have been placed for them by the group admin. This will consist of the order number, date, number of events, number of subscriptions, order total, and current order status.
My Groups	Individual Members will not see this section. Once they are added to a group or create a group this section will appear on their "My Home" page and will contain	All group members will be able to view a list of group members names, email addresses. Group admin, and email contact for the group.

Formatted Table

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Section Name	Individuals	Group Members	
	information that group members can see.		**Formatted Table**
Account Balance	Individual members will see their available account balance. If the balance is positive, this section will contain the message "This amount can be used towards any orders that you place". If the balance is negative, this section will contain the message "This amount is owing by you to the organisation.".	The group admin will be able to see the balance for the whole group. Non-admin members will be able to see their own balance. The same messages as the individual view will be displayed here.	**Formatted Table**
Saved Payment Methods	Individual Members will be able to view their own payment methods that have been activated.	Group admins will see the payment methods that have been activated for the group and each of their group members. Non-group admins will be able to view the payment methods that they have activated or has been activated for them.	
My Profile	This section will contain information on Title, First Name, Last Name, Email Address, and a profile picture, if the user has uploaded one.	Group Admins will be able to see the information for each group member. Non-admin group members will be able to see their information only.	**Formatted Table**
My Membership Form	This section will contain a list of the forms that have been completed or has to be completed by the user. This will consist of the form name, and the last updated date where the form has been completed and a message in red "This form requires completion/updating." where the organisation admin has requested a form be completed / updated.	Group Admins will be able to see the forms for all group members. Non-admin members will be able to see the forms for themselves. The same information as is displayed to the individuals.	

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The users will be able to expand each of these sections by clicking on a view button. This will navigate them to the corresponding page for the selected section. These pages will be described further below.

- Upcoming Events

This will show the next three events that have been scheduled by the organizations a user is linked to 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.

- My Subscriptions
  This section will display the details of the users subscription with any organisations that they are linked to.

- 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.

- 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.

My Organisations

The user will be navigated to this page once they click on the view button in the My organisation section on the home page.

The unexpanded page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	My Organisations Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Organisations".
	Information	Text Field	String	N/A	This field will be populated by the application with information such as when a user has been added to a group by an admin user.
	Search	Search Bar		N/A	This field will allow the user to search for an organisation. The application will return search results that are clickable, once the user clicks on a search result, they should be navigated to the organisation public page.
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

Below this will be a table of organisations that the user has been added to by the admins of teat organisation, either as part of a group or as an individual. The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation.
Date Added	Text Field	String	This column will contain the date that the user was added to an organisation.
Added As	Text Field	String	This column will contain the role that the user was added with.
Actions	Buttons		This column will contain buttons allowing the user to view the organisation, accept

Column Name	Column Type	Column Data Type	Column Rules
			the organisation, and remove themselves. If they choose to view the organisation, if the organisation has set up two-factor authentication or they are an admin of the organisation, they will be directed to a page where they can capture their pin from the Google Authenticator app. If they choose to accept the organisation, the organisation will be added to their current list. If they choose to remove themselves, the user information will be removed from the organisation and the organisation will be moved to their previously joined organisations.

Below this, there will be a table detailing the organisations that the user has been linked to. This will consist of the following:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation.
Date Joined			This column will be populated with the date that the user joined the organisation.
Role			This column will be populated with the role that the user has in the group. (Super Admin, Admin, Member, Family Group Admin, Corporate Group Admin, Group Member, User)
Actions			This row will contain action buttons for the user to view the organisation page, request to be removed from the group, and go to the admin page for that group if they are an admin user.

Column Name	Column Type	Column Data Type	Column Rules
			If the user chooses to view the organisation page, the user will be navigated to the public page for that organisation. If the user chooses to remove themselves from the organisation, the user will be presented with a message asking them to confirm. If they confirm, the application will notify the administrator of that organisation. If the user chooses to view their admin page they will be navigated to the admin home for that organisation.

Below this there will be a table of the organisations that the user was previously linked to. This table will contain the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation.
Date Left	Text Field	String	This will contain the date that the user left the organisation.
Actions	Buttons		This column will contain buttons to allow the user to rejoin the organisation or request that their information be removed.

OTP Screen

Where the user is an organization admin or is a member of an organization that has configured for two factor authentication, they will be directed to a screen where they will be able to enter their pin from the google authenticator app. The page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Pin	Text Field	String	Yes	The user will use this field to enter their pin.
	Submit	Button			The user will use this button to submit the pin. Once clicked, the application will

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					verify the Pin. If unsuccessful, the application will present a message informing the user and allow them to capture a new pin.
					If successful, the user will be directed to their My home page if they signed in from the Membi Home page, the organisation page if they signed in from the organisation public page, or the cart if they signed in from the cart page.

Events

Users will be navigated to the events page when clicking on the events section of the "My Home".

The Events page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Events Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Bookings".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

The page will further consist of a table that details the event bookings they had made. The table columns will consist of:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation that created the event.
Event Title	Text Field	String	This column will contain the title of the event.
Event Date	Text Field	String	This column will contain the date of the event.
Event Time	Text Field	String	This column will contain the time of the event.

Column Name	Column Type	Column Data Type	Column Rules
Event Venue	Text Field	String	This column will contain the venue of the event.
Status	Text Field	String	This column will contain the status of the event booking.
Actions	Buttons		This column will contain a buttons that will allow the user to view the organisation's event page, request to cancel the booking, or go to the form for the event to edit it.

There will be a further table below the event bookings table that will detail events where the user joined a waiting list. The waiting list table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation that created the event.
Event Title	Text Field	String	This column will contain the title of the event.
Event Date	Text Field	String	This column will contain the date of the event.
Event Time	Text Field	String	This column will contain the time of the event.
Event Venue	Text Field	String	This column will contain the venue of the event.
Waiting List Status	Text Field	String	This column will contain the waiting list status of the event. (On waiting list, invited)
Actions	Button		This column will contain buttons to view the event page, while the status is "On waiting list", there will be a button for a user to remove themselves from the waiting list, and when the status changes to invited, there will be a button for the user to go to the event page to create a booking.

Once the user books an event for which they were on the waiting list. The event will move from the waiting list table to the event booking table.

For users who are group admins, they will be able to see the events that they booked on behalf of their group and the bookings they made on the behalf of members within their group. Non-admin members will be able to view the group bookings for the group they are a part of or the individual bookings that have been made for them by their group admin.

Subscriptions

Users will be navigated to the subscriptions page after clicking on the view button of the subscriptions section on the "My Home" page.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Subscriptions Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Subscriptions".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.
	Renew	Button		N/A	This button will be used by the user to renew subscriptions that they had selected by checking the checkbox in the "Current/Recently Expired" table. Once this button is clicked, the selected subscriptions will be added to the cart for this user and they will be navigated to the checkout page.

Below this, there will be a table for the current/recently expired subscriptions that will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
CheckBox	CheckBox		This column will contain checkboxes for the user to select individual subscriptions or select the checkbox in the column headings to select all the subscriptions.

Column Name	Column Type	Column Data Type	Column Rules
Subscription	Text Field	String	This column will be populated with the name of the subscription in the format {Subscription Type Name} – {Price Option Name}
Members	Text Field	String	The member, members or group covered by the subscription will be populated in this column.
Start Date	Text Field	String	This column will be populated with the start date of the subscription.
End Date	Text Field	String	This column will be populated with the end date of the subscription.
Renewal Status	Text Field	String	This column will be populated with the renewal status of the subscription (Scheduled to Auto-Renew, Manual Renewal, Pending Order Number, Swapping to, Not Renewing)
Form Details	Button		This column will contain buttons to view or edit the form if a form was linked to the subscription. Once the user clicks on these they should be navigated to the page where they can view or edit the form.
Renewal Amount	Text Field	String	This column will be populated with the price to renew the subscription.
Renewal Payment Method	Text Field	String	This column will contain the payment method that was used to pay for the subscription which will also be used to pay for the renewal. There will be a link to change the method listed below this. Once this link is clicked, the user will be presented with a window containing the available payment methods for the user to select to pay for the renewal.
Actions	Links		This column will contain text links "Don't Renew" and "Swap at Renewal" which

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Column Name	Column Type	Column Data Type	Column Rules
			will be disaplayed for subscriptions with renewal status "Auto-Renew" and "Manual Renew". For subscriptions with the renewal status "Swapping", only the "Don't Renew" link will be shown. If the "Don't Renew" link is clicked, the status for the subscription should be changed to "Not Renewing" and should not be renewed. If the "Swapping to" link is clicked, the status for that subscription should be changed to "Swapping to" and the application should present a pop-up screen allowing the user to select the subscription they will swap to.

The renewal payment method window presented to the user when they select the option to change the payment method will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Warning Message	Text Field	String		This field will be populated by application with the warning message "If you want to use one of the payment methods that can't be selected, you need to manually renew the subscription. You will be able to select the payment method in checkout."
	Available Payment Methods	Drop Down Menu	- Payment Methods Configured By Admin	N/A	The user will select the payment method they want to use to renew subscription. Payment methods that will require them to go offsite should greyed out.
	Cancel	Button		N/A	This button will be used to navigate back to the "Subscriptions" page. Once clicked, the user will be navigated back to the ""Subscriptions" page and selections made in the drop-down menu should be ignored.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Confirm	Button		N/A	This button will be used by the user to confirm the payment method selected. Once clicked, the user will be navigated back to the "Subscriptions" page and the selected payment method should be assigned to the subscription it was selected for. Where the user selected a greyed out payment method, the status will be updated to manual renew.

The swapping window presented to the user when they select the "Swapping To" link will consist of the following fields.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Membership / Other	Radio Button	- Membership - Other	Yes	The user will use this field to select if they want a membership subscription or a non-membership subscription (Other).
	Subscription Categories	Drop Down Menu	- Categories configured by Admin	Yes	The user will use this field to select the subscription category (if there is only one category don't display this field)
	Subscription Type	Drop Down Menu	- Subscription Types configured by Admin	Yes	The user will use this field to select the subscription type. The options in the dropdown menu should be filtered to show the types for the category selected. (if there is only one type don't show this field).
	Subscription Price Option	Drop Down Menu	- Subscription Price Options configured by Admin	Yes	The user will use this field to select the price option. The options in the dropdown menu should be filtered to show the price options for the subscription type selected.

Orders

The user will be navigated to the orders page once they click on the view button of the orders section of the "My Home" page.

The page will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Orders Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Orders".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

Below this, there will be two tables: "Current Subscriptions and Event Bookings" and "Older Orders"

The Current subscriptions and Event Bookings table will consist of the following:

Column Name	Column Type	Column Data Type	Column Rules
Order Number	Link		This column will be populated by the order number for the order. This should be clickable and once clicked, should navigate the user to the order page for that order.
Placed	Text Field	Date	This will be populated by the date that the order was placed.
Purchaser	Text Field	String	This will be populated with the name of the person who paid for the order (Only displayed for group purchases).
Order Total	Text Field	String	This will be populated with the total cost of the order, including tax, preceeded by the currency symbol of the organisations currency.
Payment Method	Text Field	String	This will be populated with the payment method used to pay for the order. If no payment was required this should be populated with "None".
Order Status	Text Field	String	This will be populated with the order status of the order.

This table should be sorted by the most recent order placed in descending order.

Above the Older orders table will be a radio button to filter the payments displayed in the table. This will consist of the following:

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Filter	Radio Button	- All - Subscripotions - Event Bookings	No	This field will be used by the user to filter the orders seen in the "older orders" table. By default "All" will selected and all orders displayed, the user selects Subscriptions, orders with subscription line items should be displayed. If the user selects Event Bookings, only orders with event bookings should be displayed.

The Older orders table will be populated with the following:

Column Name	Column Type	Column Data Type	Column Rules
Order Number	Link		This column will be populated by the order number for the order. This should be clickable and once clicked, should navigate the user to the order page for that order.
Placed	Text Field	Date	This will be populated by the date that the order was placed.
Purchaser	Text Field	String	This will be populated with the name of the person who paid for the order (Only displayed for group purchases).
Order Total	Text Field	String	This will be populated with the total cost of the order, including tax, preceeded by the currency symbol of the organisations currency.
Payment Method	Text Field	String	This will be populated with the payment method used to pay for the order. If no payment was required this should be populated with "None".
Order Status	Text Field	String	This will be populated with the order status of the order.

If the user clicks on the order number, they will be navigated to the page for that order which will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Purchaser	Text Field	String	N/A	This field will be populated with the name of the purchaser.
	Placed On	Text Field	String	N/A	This field will be populated with the date that the purchase was made on.
	Order Total	Text Field	String	N/A	This field will be populated with the total amount of the order.
	Status	Text Field	String	N/A	This field will be populated with the current order status.
	Payment Method	Text Field	String	N/A	This field will be populated with the payment method used to pay for the order.
	Back	Button			The user will use this button to exit the order page. Once clicked, the user will be navigated back to the "My Orders" page.

Below this there will be two tables. The first table will contain the line items of the order and the second table will contain the order statement history.

The order items table will consist of:

Column Name	Column Type	Column Data Type	Column Rules
Description	Text Field	String	This column will be populated with the line items that formed part of the order.
Tax	Text Field	String	This column will be populated with the tax that was charged on each of the line items.
Price	Text Field	String	This column will be populated with the price that was charged per line item.

Beneath the table there will be two rows that details any surcharges added to the payment and the total which sums up the entries in the price column and the surcharges.

The Status History table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Status	Text Field	String	This column will be populated with the order status that was assigned to the order.
Date	Text Field	String	This column will be populated with the date and time that the order status was assigned to this order.

My Groups

Users who are part of groups will be able to Navigate to this page once they click on the view button of the "My Group" section of the "My Home" page.

Group admins will be able to see details of all users on this page. Non-admin users will be able to see their own details.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	My Groups Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Groups".
	Add Member	Button		N/A	This button will be available to group admins only and will enable them to add a member to a group. Once clicked, a window will be presented to the group admin which will enable them to create a new member.
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

Below this, a table will display the user details for each member in the group. The table will consist of the following:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text Field	String	This column will be populated with the first name and last name of the group member.

Column Name	Column Type	Column Data Type	Column Rules
Email Address	Text Field	String	This column will be populated with the email address of the group member if one was provided.
Group Administrator	Text Field	String	This column will contain a "Yes" if the member is an administrator of the group and a "No" if the member is not an administrator.
Group Email Contact	Text Field	String	This column will contain a "Yes" if the member an email contact of the group and a "No" if the member is not an email contact of the group.
Actions	Buttons		This column will contain buttons for the admin user to edit the user details, remove the member from the group, make the user an email contact for the group. If the admin clicks on the edit details, they will be presented with a screen containing the users details, allowing them to edit the user details. If the admin clicks the button to remove the user from the group, the application will perform validations to ensure that the user being removed is not a junior, that the user is not the last group admin and present warnings to the user if any of these validations are failed.

Add Member Screen.

This screen will be displayed to the admin user when they click the button to add a member to their group.

Some of the fields the user will be presented with on this page will be:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Name	Text Field	String	Yes	The user will use this field to capture the name of the new member.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Surname	Text Field	String	Yes	The user will capture the surname of the user. If the group is a family group, the field will be prepopulated with the surname of the first group member.
	Date of Birth	Calendar Dropdown		Yes	This field will be displayed where an organisation can have junior members or age-dependant subscriptions. The user will use this field to capture the date of birth of the user.
	Email Address	Text Field	String	No	The user will capture the email address of the user in this field.
	Address Line 1	Text Field	String	Yes	If a physical address is required and If the organisation admin indicated that each user in a group must provide an address, this field will be displayed. If a physical address is required but each group member does not need to provide and address, the group member will be assigned the default address for the group. Otherwise, this field will not be displayed.
	Address Line 2	Text Field	String	Yes	If a physical address is required and If the organisation admin indicated that each user in a group must provide an address, this field will be displayed. If a physical address is required but each group member does not need to provide and address, the group member will be assigned the default address for the group. Otherwise, this field will not be displayed.
	Address Line 3	Text Field	String	Yes	If a physical address is required and If the organisation admin indicated that each user in a group must provide an address, this field will be displayed. If a physical address is required but each group member does not need to provide and address, the group member will be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					assigned the default address for the group. Otherwise, this field will not be displayed.
	Post Code	Text Field	String	Yes	If a physical address is required and If the organisation admin indicated that each user in a group must provide an address, this field will be displayed. If a physical address is required but each group member does not need to provide and address, the group member will be assigned the default address for the group. Otherwise, this field will not be displayed.
	Country	Text Field	String	Yes	If a physical address is required and If the organisation admin indicated that each user in a group must provide an address, this field will be displayed. If a physical address is required but each group member does not need to provide and address, the group member will be assigned the default address for the group. Otherwise, this field will not be displayed.
	Group Administrator	Checkbox			If the user is intended to be an administrator for the group, the group admin will check this box. For family groups, the box will be checked for adult members by default. If the user being created is a Junior, the box should not be allowed to be checked.
	Email Contact	Checkbox			If the user is intended to be an email contact, the admin user should check this box. If the box is checked, the email address field should be validated to ensure it contains a valid email address. If the user being created is a Junior, the box should not be allowed to be checked.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Cancel	Button			This button will be used by the group admin to cancel the addition of a member to the group. Once clicked, the window should be closed, and the user should be navigated back to the "My Groups" page.
	Confirm	Button			This button is used to confirm the addition of the member. Once clicked, the member captured should be created and linked to the group and organisation. If the organisation admin configured a member form for this type of membership, the admin should be navigated to a page where they can complete the form information. They should also get a warning if the newly created member is not covered by existing subscriptions the group holds.

Account Balance

The account balance page is the page that the user will be navigated to once they click on the view button of the "Account Balance" section of the "My Home" page.

The page will contain the following fields at the top.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Account Balance Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "Account Balance".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.
	Filter	Text Field	String	N/A	This field will be populated by the application with the text "Filter"

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Filter Options	Radio	- All Time - This Month - This Year - Custom	No	The user will use this field to f… information that is seen in the tables below. By default, the All-Time option will… checked.
	Date From	Calendar Drop Down			This field should be displayed when… user chooses the custom filter opt… Once a data is selected, the applica… should filter out items in the table that occurred before this date.
	Date to	Calendar Drop Down			This field should be displayed when… user chooses the custom filter opt… Once a data is selected, the application should filter out items in the table that occurred after this date.

The tables below this section will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Date	TextField	String	There should be no date for opening and closing balances. For orders the date that the order was created will be displayed. For cancellations the date that the item / order was cancelled should be displayed. For payments/refunds the date of the payment/refund should be displayed.
Description	TextField	String	The first row should say "Closing Balance" For orders this row should contain the order number, which should be clickable to navigate the user to the order page. For Cancellations/Partial cancellations it should contain the text "Cancellation/partial cancellation of order [number]", the order number

Column Name	Column Type	Column Data Type	Column Rules
			should be clickable to direct the user to the order page for that order. For payments the column should show the text "Payment/partial payment for order [number]" or "Payment to account Balance" If a payment is made for multiple orders, each should be shown on a different line. For refunds, this column should contain the text "Refund/partial refund of order [number]." If a payment is made to refund multiple orders, each should be shown on a different line
Order / Cancellation Amount	TextField	String	The column will contain the currency amount of the order or cancellation. Cancelations will be displayed in red.
Payments From / To You	TextField	String	This column will show the currency amount of the payment. Payments to you will be shown in red.
Balance	TextField	String	The balance amount. The amount should be positive if the organisation owes the user and negative if the user owes the organisation. Negative amounts should be shown in red.

The entries in the table should be sorted in order of the most recent payment to the least recent payment. The table should show up to 20 rows at a time and the user should be allowed to click through pages to see the other rows.

Saved Payments Methods

The saved payment method page will contain the user's saved payment methods. The user will be directed to this page after they click on the view button of the Saved Payments Method section of the "My Home" page. This page will contain details on the payment methods that have been selected by the user for themselves.

The page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Saved Payment Methods Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "Saved Payment Methods".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Payment Methods Heading	Text Field	String	N/A	This field will be populated by the application with the payment method e.g. Direct Debit Mandate.

For each payment method there will be a table containing information about the saved payment method.

For Direct Debits the table will consist of:

Column Name	Column Type	Column Data Type	Column Rules
GoCardless Mandate	TextField	String	This column will contain the GoCardless mandate ID.
GoCardless User	TextField	String	This column will contain the name and email address the user used for GoCardless.
Setup Date	TextField	String	This column will contain the date that the user set up the mandate on GoCardless.
Status	TextField	String	This column will contain the status of the GoCardless Mandate. If the status is cancelled, the date that the mandate was cancelled should be displayed in brackets.

Column Name	Column Type	Column Data Type	Column Rules
Cancellation Link	Link		This column should be populated with a link to cancel the GoCardless mandate. Once clicked, the application should display a warning message to the user. If the user confirms that they want to cancel, an API call will be triggered to GoCardless to cancel the mandate.

For Bank Transfer the table will consist of:

Column Name	Column Type	Column Data Type	Column Rules
Payment Reference	TextField	String	This column will contain the payment reference that was generated for this user.

My Profile

The "My profile" page is the page that users will be navigated to once they select the view button on the My Profile portion of the "My Home" page.

The My profile will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	My Profile Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Profile".
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page.

There will be a table that contains the following information:

Column Name	Column Type	Column Data Type	Column Rules
Title	TextField	String	This column will contain the Title of the user, if available.

Column Name	Column Type	Column Data Type	Column Rules
First Name	TextField	String	This column will contain the first name of the user.
Last Name	TextField	String	This column will contain the last name of the user.
Email Address	TextField	String	This column will contain the email address of the user.
Physical Address	TextField	String	This column will contain the physical address of the user. If the user has multiple physical addresses provided, there should be an indicator next to the address that was selected as the primary address.
Actions	Buttons		This column will contain buttons to allow the user to update their details, change their default address, and reset their password. If they click on the update button, they should be presented with a window with their details, allowing them to update their details. If they select the reset password button, the user will be presented with a screen allowing them to reset their password. If they click on the button to change their default address, they should be presented with a window displaying the three addresses and allowing them to select and confirm the address they want to use as their default address.

The window allowing the user to reset their password will be displayed to the user once they click on the button to reset their password. This window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Email Address	Text Field	String	Yes	This user will use this field to enter the email address associated with their account. The application should validate

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					that the email entered is a valid format for an email address.
	Submit	Button			The user will select this button to submit the email address they have entered. Once clicked, the application must verify that the email is associated with their account. If it is, the application should email a password reset link to the email address and inform the user of this. This will then follow the normal password reset process. If it is not, the user should be shown a message informing them that the email address they have captured is not recognised.
	Cancel	Button			The user will select this button to cancel the password reset process. Once clicked, the user will be navigated back to the "My Profile" page.

The window allowing a user to edit their details will be presented to them when they click the button to update their details. The window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Picture	Upload			The user will use this field to upload profile picture. Once this is clicked, application should present the a window the to the user allowing them to navigate to a folder location to pick a photo for uploading.
	Title	Drop down menu	- Titles	No	This user will use this field to enter email address associated with account. The application should valid that the email entered is a valid forma an email address.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	First Name	TextField	String	No	This field will be populated with the user first name. The user will be able to edit this field to change their first name.
	Last Name	TextField	String	No	This field will be populated with the user lasf name. The user will be able to edit this field to change their last name.
	Email Address	TextField	String	No	This field will be populated with the user email address. The user will be able to edit this field to change their email address.
	Address Line 1	TextField	String	No	This field will be populated with the first line of the user address for each of addresses linked to their profile. The user will be able to edit this field to change their address first lines.
	Address Line 2	TextField	String	No	This field will be populated with the second line of the user address for each of addresses linked to their profile. The user will be able to edit this field to change their address second lines.
	Address Line 3	TextField	String	No	This field will be populated with the third line of the user address for each of addresses linked to their profile. The user will be able to edit this field to change their address third lines.
	Post Code	TextField	String	No	This field will be populated with the post code of the user address for each of addresses linked to their profile. The user will be able to edit this field to change their address post codes.
	Country	TextField	String	No	This field will be populated with the country of the user address for each of addresses linked to their profile. The user will be able to edit this field to change their address countries.
	Confirm	Button			The user will use this button to confirm the changes. If the user has updated their email address, the application should

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					present a message to the user informing them that a confirmation email has been sent to the email address and they will be required to log in before the email address is confirmed.
	Cancel	Button			The user will use this button to cancel any updates. Once clicked, the user will be navigated back to the "My Profile" page and any changes will be ignored.

My Membership Form

The "My Membership Form" page will be the page that the user is navigated to when they click on the button next to the form on the "My Home" page.

The page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	My Membership Form Page Heading	Text Field	String	N/A	This field will be populated by the application with the text "My Membership Form".
	Membership Form Fields	Various	Various	Various	These fields will consist of the fields in the membership form that had been set up by the organisation admin. The user will be able to edit these fields to update the information.
	Confirm	Button		N/A	The user will select this button to confirm the changes they have made. Once clicked, the user should be presented with a message asking them to confirm that they want to proceed. If they proceed, the changes made should be committed and the last updated date on the unexpanded section of the "My Home" page should be updated to the latest date.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Back	Button		N/A	This button will be used to navigate back to the "My Home" page. Once clicked, the user will be navigated back to the "My Home" page and any changes made to the form data will be discarded.

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, there will be actions in this section related to ecommerce orders and resource bookings.

Event Bookings (Out of Scope)

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 component will allow users to have the ability to view resource availability via a calendar view and be able to book a club resource for a specified time and pay for the booking.

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Volunteer (Out of Scope)

This component will allow the members to view the volunteer roster that has been set up by the admin of an organization that they are linked to, sign up to volunteer and request to be moved.

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 (Out of Scope)

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 component will allow users to have the ability to view resource availability via a calendar view and be able to book a club resource for a specified time and pay for the booking.

Application Admin Users

Application admin users will manage aspects of the application.

Application Administration Home

The application administrator will land on a dashboard page once they have signed into the application. The dashboard will consist of the following metrics:

- Organisations:
    - o New Organisations Created (Card Daily)
    - o Organisations Exceeding Price Bracket Limits (Card Daily)
    - o Organisations Whose Free Trails are Ending (Card Daily)
- Finance:
    - o Order Revenue
    - o Transaction Revenue
    - o Subscription Revenue

- o   Invoices Due
- Total Members (Card)
- New Orders (Card – Daily)

Side Menu

The side menu on the dashboard will include links to the following:

- Content Management
- Organisations
- Members
- Orders
- Communication
- Finance
- Job Scheduling
- Audit Logs

Content Management

The application administrator user will be allowed to configure the content of the public pages of the application.

Membi Public Pages

The Membi public pages will consist of tabs for the:

- Help Section
- Demos

In the Help tab, the application administrator will have the option to manage help articles. The page will consist of an existing articles table and buttons to allow the application administrator to create a new category, new sub category and new article.

The existing article table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Article Title	Text Field	String	This column will contain the Title of the article.
Audience	Text Field	String	This column will contain the intended audience of the article, either "Member Help" or "Admin Help"
Article Category	Text Field	String	This column will contain the category that the article was assigned to.

Column Name	Column Type	Column Data Type	Column Rules
Article Subcategory	Text Field	String	This column will contain the subcategory that the article was assigned to.
Created By	Text Field	String	This column will contain the name of the person who created the article.
Created Date	Text Field	String	This column will contain the date that the article was created.
Last Update	Text Field	String	This column will contain the date that the article was last updated.
Updated By	Text Field	String	This column will contain the name of the person who last updated the article.
Actions	Buttons		This column will contain buttons for the application admin users to view, edit, and delete the help articles. If the view button is clicked, a window should be presented to the application administrator, allowing them to view the contents of the help article. If the edit button is clicked, a window allowing the application administrator to edit the article will be presented to them. If the delete button is clicked, the article should be deleted and removed from the help section of the Membi public website.

The window for the new category creation will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Audience	Radio	- Member Help - Admin Help	Yes	The application admin will use this field to select whether the category will be part of Member help or Admin Help.
	Category	Text	String	Yes	The application administrator will use field to capture the name of the category.
	Cancel	Button	▲		The application administrator will use button to cancel the new cate creation. Once clicked, the application

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					administrator will be navigated back to the help article page.
	Submit	Button			The application administrator will use button to confirm the new category creation. Once clicked, the application administrator will be navigated back to the help article page and the category will be linked to the Member help.

The window for new subcategory creation will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Category	Drop Down Menu	Categories	Yes	The application administrator will use field to select the category that the subcategory will belong to.
	Sub-Category	Text	String	Yes	The application administrator will use field to capture the name of the subcategory.
	Cancel	Button			The application administrator will use this button to cancel the new subcategory creation. Once clicked, the application administrator will be navigated back to the help article page.
	Submit	Button			The application administrator will use this button to confirm the new category creation. Once clicked, the application administrator will be navigated back to the help article page and the category will be linked to the Member help.

The window for creating a new article was consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Audience	Radio	- Member Help	Yes	The application admin will use this field to select whether the article will be part of Member help or Admin Help.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			- Admin Help		
	Category	Drop Down Menu	- Categories	Yes	The application administrator will this field to select the category that the new article will belong to. The categories in the drop-down menu must be filtered to show those that are linked to the selected audience.
	Sub-Category	Drop Down Menu	- Sub-categories	No	The application administrator will use this field to select the sub-category that the new article will belong to. The sub-categories in the drop-down menu must be filtered to show those that are linked to the selected category.
	Article Text	Text Editor	String	Yes	The application administrator will this field to capture the text of article.
	Cancel	Button			This button will be used by application administrator to cancel article. Once clicked, the user should he navigated back to the content management page.
	Submit	Button			This button will be used by application administrator to submit article. Once clicked, the application will publish the article in the correct section of the help page based on the categories and audience selected by the application administrator.

Demos

In the demos tab their will be buttons to publish a new demo video and a table of the existing demo videos.

The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Demo Title	Text Field	String	This column will contain the Title of the article.
Demo Description	Text Field	String	This column will contain the demo description.
Creator	Text Field	String	This column will contain the name of the person who created the demo.
Create Date	Text Field	String	This column will contain the date that the demo was created.
Update Date	Text Field	String	This column will contain the date that the demo was last updated.
Updated By	Text Field	String	This column will contain the name of the person who last updated the demo.
Video URL	Text Field	String	This column will contain the embed URL of the demo video..
Actions	Buttons		This column will contain buttons for the application admin users to view, edit, and delete the demos. If the view button is clicked, a window should be presented to the application administrator, allowing them to view the demo. If the edit button is clicked, a window allowing the application administrator to edit the demo will be presented to them. If the delete button is clicked, the demo should be deleted and removed from the demo section of the Membi public website.

The application administrator will be navigated to the create demo window when they click on the "Create New" button on the demo tab. The window will consist of the following fields.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Demo Title	Text Field	String	Yes	The application administrator will use this field to capture the title of the demo.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Demo Description	Text Field	String	Yes	The application administrator will use this field to capture the description of the demo.
	Embed URL	Text Field	String	Yes	The application administrator will use this field to capture the embed URL from Youtube to embed the video in the Membi Demo page for that video.
	Cancel	Button			The application administrator will use this button to cancel the capturing of the demo. Once clicked, the application administrator will be navigated back to the public pages screen.
	Publish	Button			The applicateion adminsistrator will use this button to publish the demo to the membi public page. Once clicked, the application will publish the video to the membi demo page.

Tool Tips

The tool tips tab In the content management section will consist of a button to capture a new tooltip. It will further consist of a table detailing the tooltips that have been created. The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Tooltip ID	Text Field	String	This column will contain the id of the tooltip.
Page	Text Field	String	This column will contain the name of the page where the tooltip appears.
Field	Text Field	String	This column will contain the name of the field on the page where the tool tip appears.
Text	Text Field	String	This column will contain the text that appears in the tooltip.
Actions	Buttons		This field will contain buttons allowing the user to edit a tooltip and remove a tooltip. If the button to edit is clicked, the application will present a window to the

Column Name	Column Type	Column Data Type	Column Rules
			application admin that will allow them to edit the tooltip. If the button to remove the tooltip is clicked, the application will remove the tooltip from the application.

The application administrator will be navigated to the tooltip creation window when they click on the new tooltip button. The window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Page	Dropdown Menu	- Pages	Yes	The application administrator will use field to capture the page where the tooltip will appear.
	Field	Dropdown Menu	- Fields	Yes	The application administrator will use field to capture the field where the tooltip will appear. The dropdown menu should be filtered to show the fields that appear on the selected page.
	Text	Textfield	String	Yes	The application administrator will use this field to capture the text that will appear in the tooltip.
	Cancel	Button			This button will be used to cancel the capturing of the tooltip. Once clicked, the user will be navigated back to the content management page.
	Confirm	Button			This button will be used to confirm the capturing of the tooltip. Once clicked, the tooltip will be saved and will be pulled through to the front end.

Organisations

The system administrator will be navigated to the organisations page once they click on the organisations link in the side menu.

The organisation list will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Organisations Page heading	Text Field	String	N/A	This field will be populated by the application with the text "Organisations".
	Search	Search			This field will be used by the application admin. The application should allow the application admin to enter organisations names and filter the table to show organisations who meet the search criteria.
	Filter	Radio	- Free Trail - Live - All		This field will be used by the application admin to filter the organisations displayed in the table. If the application admin selects Free Trail, only organisations who are on a free trail should be displayed. Of the application admin selects Live, only the organisations who are live should be displayed. By default, it will show all.
	Featured Club	Radio	- Yes - No - Show All		This field will be used by the application to filter the organisations shown in the table to those that are a featured club, not a featured club. By default, it will show all all.
	Hidden	Radio	- Yes - No - Show All		This field will be used by the application admin to filter the organisations shown in the table to those that are hidden, not hidden, and all. By default, all will be shown.
	Admin Blocked	Radio	- Yes - No - Show All		The application administrator will be able to use this field to filter the organisation in the table to show organisations whose administrators have been blocked, have not been blocked and all organisations. By default, all will be selected.
	View	Radio	-20 -100		This field will be used by the application admin to select how many organisations to display at a per page in organisation table. If 20 is selected, 20 organisations should be displayed in the

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					table. If 100 is selected, 100 organisations should be displayed in the table. By Default 20 will be selected.
	Back	Button			This button will be used by the application admin to navigate back to the homepage. Once clicked, the application admin should be navigated back to the homepage.

The organisations page will consist of the following table:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text Field	String	This column will contain the name of the organisation.
Shortname	Text Field	String	This column will contain the short name of the organisation.
Time Created	Text Field	String	This column will contain the date and time that the organisation was created.
Last Admin Login	Text Field	String	This column will contain the date and time of the last time an admin user of the organisation logged in.
Members	Text Field	String	This column will contain the number of members that are linked to the organisation.
Orders	Text Field	String	This column will contain the amount of orders the organisation has.
Renewal	Text Field	String	This column will contain a "Yes" if the club is renewing and a "No" if the club is not renewing.
Actions	Buttons		This column will contain buttons to View the organisation, clear down

Column Name	Column Type	Column Data Type	Column Rules
			organisation data, and delete the organisation. If the view button is clicked, the application admin will be navigated to the organisation view page. If the clear down button is clicked, the application admin will be presented with a window allowing them to select all or specific data to clear down. If the delete organisation button is clicked, the application admin will be presented with a warning and once they confirm the action, the organisation and member data will be soft deleted. Details of the invoices for this organisation should not be deleted.

Organisation page

The application admin will be navigated to the organisation page when they click on the view button on the organisations table.

The organisation page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Organisation Page heading	Text Field	String	N/A	This field will be populated by the application with the name of the organisation.

The organisation details section of the page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Organisation Name	Text Field	String	N/A	This field will be populated by the application with the name of the organisation.
	Organisation Shortname	LInk		No	This field will be populated by the application with the shortname of the organisation. The shortname should be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					clickable, allowing the admin to navigate to the organisation public page.
	Organisation Website	Text Field	String	N/A	This field will be populated by the application with the website of the organisation, if one was provided.
	Organisation Email	Text Field	String	N/A	This field will be populated by the application with the email of the organisation.
	Organisation Phone	Text Field	String	N/A	This field will be populated by the application with the phone number of the organisation.
	Organisation Address	Text Field	String	N/A	This field will be populated by the application with the address of the organisation, if one was provided, in the format: Address Line 1 Address Line 2 Address Line 3 Post Code Country
	Action	Button			These buttons will allow the application admin to edit the organisation to edit the organisation shortname and make the organisation a featured club. Once the edit button is clicked, the organisation short name field should become editable and the application admin should be allowed to change the short name and once saved, the organisation URL will be updated and an email will be sent to the organisation administrator. Once the make a feature club button is clicked, a link to the club public page will be put into the featured clubs section of the home page.

The administrators section of the page will consist of buttons to add an admin member to the organisation. The page will further consist of a table that has the following information:

Column Name	Column Type	Column Data Type	Column Rules
Name	Text Field	String	This column will contain the name of organisation admin.
Email	Text Field	String	This column will contain the email address of the organisation admin.
Role	Text Field	String	This column will contain the role of the organisation admin.
Last Login	Text Field	String	This column will contain the date and time of the last time the organisation admin logged in.
Actions	Buttons		This column will contain buttons to Remove an admin, promote the admin to super user (if they are not a super user).

The application admin will be able to add administrators to the organisation from this page. Once it is clicked, the application will present the application admin with a window that contain the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Member Name	Drop Down Menu	- Member names	N/A	The application admin will use this field select the member who will be added an administrator to the organisation. user will be able to search through the drop down menu to filter the results of the drop down menu.

Once the application admin has selected a member, they will be presented with the screens to manage the member's access. This will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Access Role	Drop Down Menu	- Read Only - Admin - Super Admin	Yes	The application admin will use this field to select the level of admin access that the user will have.

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Confirm	Button			The application admin will use this button to confirm their selection. Once clicked, the application should promote the user to an admin user with the default permissions for their access role, send an email to the organisation email to inform them and send an email to the member to inform them.
	Cancel	Button			This button will be used by the application admin to go back. Once clicked, application admin should be navigated back to the organisation page.

The application admin should then be able to create specific permissions for the admin member just like the organisation administrator would.

The emails section of the page will consist of buttons to send an email to the organisation. The page will further consist of a table that has the following information:

Column Name	Column Type	Column Data Type	Column Rules
Email ID	Text Field	String	This column will contain the ID of the email.
Subject	Text Field	String	This column will contain the subject of the email.
Number of Recipients	Text Field	String	This column will contain the number of recipients that the email was sent to.
Sent Time	Text Field	String	This column will contain the date and time that the email was sent.
Open Rate	Text Field	String	This column will contain the percentage of recipients who opened the email.
Action	Button		This column will contain a button to view the email that was sent. Once clicked, the application should present the application admin with a window that displays the email content.

If the user elects to send an email. They will be presented with a window that will allow them to build the email. The window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Send To	Multi Select List	- Organisation Administrators	Yes	This field will be populated with the names of the administrators for organisation. The application admin will be able to select the administrators that they wish to receive the email.
	Template	Drop Down	Templates	No	This field will be populated with email templates that the application admin had created previously. If one is selected, the email text should be populated with the text of the template email.
	Subject	Text Field	String	Yes	This field will be used by the application admin to capture a subject line for the email.
	Text	Text Field	String	Yes	This field will be used by application admin to edit the email that they want to send. The application admin will be allowed to use tags.
	Preview	Button			The application admin will use this button to view a preview of the email. Once clicked, the user will be presented with a window where they can see the email.
	Cancel	Button			The application admin will use this button to cancel. Once clicked, the email should be discarded, and the application admin user should be navigated back to the organisation page.
	Save as template	Button			The application admin will use this button to save the email as a template. Once selected, the

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					application admin will be presented with a window to enter the template name and save the template.
	Send	Button			The application admin will use this button to send the email. Once clicked, the application should validate that recipients were selected and that the email body contains content. If either of these validations fail, the user will be presented with a message warning them of this. If the validations pass, the email will be sent to the recipients.

The recent orders section of the page will consist of the following table of the last 10 orders:

Column Name	Column Type	Column Data Type	Column Rules
Order Number	Text Field	String	This column will contain the ID of the order.
Time	Text Field	String	This column will contain the date and time that the order was made.
Purchaser	Text Field	String	This column will contain the name of the purchaser of the order.
Amount	Text Field	String	This column will contain the amount of the order.
Payment Method	Text Field	String	This column will contain the payment method that was used to pay for the order.
Order Status	Text Field	String	This column will contain the current status of the order
Actions	Buttons		This column will contain buttons to allow the organisation admin to clear down the order. This button should not be available if the payment method is Direct Debit and the order status is Order Placed or Payment Received.

Column Name	Column Type	Column Data Type	Column Rules
			If clicked, the order, payment and booking (for events) should be cleared and an audit trail entry should be made for the application admin to track who cleared down the order.

Clear down page

The user will be presented with this window once they click on the clear down button on the organisations table.

The window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Clear Down	Radio Button	- All Data - Specific Data	Yes	The application admin will use this field to select the data they want to delete.
	Orders, Payments, Event Bookings and Account Balances	CheckBox			This field will be displayed if application admin selects the specific data radio button. The application admin will select this if they want to delete the data for these specific items from an organisation.
	Subscriptions	CheckBox			This field will be displayed if application admin selects the specific data radio button. The application admin

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					will select this if they want to delete the data for subscriptions specifically.
	Form Data	CheckBox			This field will be displayed if application admin selects the spec data radio button. The application admin will select this if they want to delete the data for subscriptions specifically.
	Members	CheckBox			This field will be displayed if application admin selects the spec data radio button. The application admin will select this if they want to delete the data for members specifically.
	Emails	CheckBox			This field will be displayed if application admin selects the spec data radio button. The application admin will select this if they want to delete the data for emails specifically.
	Cancel	Button			This button will be used by the applica admin to cancel the clear down. O clicked, the application admin should be navigated back to the organisation page
	Confirm	Button			The application admin will use this bu to confirm their selection. Once click the application should remove the indicated data for that organisation.

Members

The application administrator will be navigated to the members section of the application after clicking on the members link in the side menu on the application administrator home page.

The members members section will consist of a button to add a new member, a search box to search for a member and a table detailing the members on the application.

The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
First Name	Text Field	String	This column will contain the first name of the member.

Column Name	Column Type	Column Data Type	Column Rules
Last Name	Text Field	String	This column will contain the last name of the member.
Email Address	Text Field	String	This column will contain the email address of the member.
Last Login	Text Field	String	This column will contain the date and time that the member last logged in.
Created	Text Field	String	This column will contain the date and time that the member profile was created.
Updated	Text Field	String	This column will contain the date and time that the member profile was last updated.
Invalidated	Text Field	String	This column will contain the date and time that the member profile was deleted.
Organisations	Text Field	String	This column contains the organisations that the member is linked to.
Actions	Buttons		This column will contain action buttons for the application administrator to view a member profile, delete a member profile, view the audit trail for the member and view the login history. If the view button is clicked, the application admin will be directed to the member page for that member. If the delete button is clicked, the application should present a warning message to the user. Once they confirm, the application should remove the user profile. If the audit trail button is clicked, the application will direct the application administrator to the Audit trail page for that member. If the view login history is clicked, the application will direct the application administrator to a page containing the login history for the last 6 weeks.

If the add a member button is clicked, the application administrator will be presented with a page allowing them to capture the basic user details and link them to an organisation. Once created, the user and administrator will be notified via email.

Orders

The application administrator will be navigated to the orders section of the application after clicking on the orders link in the side menu on the application administrator home page.

The orders section will consist of a table detailing the members on the application.

The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Organisation	Text Field	String	This column will contain the name of the organisation. The user will click on the organisation name to be navigated to the organisation page.
Order	Text Field	String	This column will contain the order number of the order. The user will click on the order number to be navigated to the order page.
Member	Text Field	String	This column will contain the first name and surname of the member who the order was assigned to. The user will click on the member name to be navigated to the member page.
Total	Text Field	String	This column will contain the total of the order.
Date Placed	Text Field	String	This column will contain the date and time that the order was placed.
Order Status	Text Field	String	This column will contain the status of the order.
Payment Method	Text Field	String	This column will contain the payment method used to pay for the order.
Bank Reference	Text Field	String	This column will contain the bank reference that was assigned to the member who made the order. This column is only populated if the payment method is Bank Transfer.

Communications

The application admin will be navigated to the communications page by clicking on the communications link in the side menu. This page will consist of buttons to create a new email, once clicked, the application administrator will be presented with a window the capture and send the email.

Create Email

The create email page will be displayed to the application administrator when they click the button to create a new email. This page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Send To (Mailing List)	Drop Down	- Mailing Lists	No	This field will be populated with names of the mailing lists that has been created by the application admin. If the application admin selects a mailing list, the members of that mailing list should be populated in the recipients page. The application should filter out admin users who have not logged in for the last six months.
	Send To (Organisations)	Multi Select List	- All - Organisations	No	This field will be populated with the names of the organisations on the platform. The application admin will be able to select the organisations that they wish to receive the email. If the application administrator selects the "all" option, all organisation administrators will be added to the recipient list. For the organisations selected, the administrators of that organisation will be available for selection from the administrators list. The application should filter out admin users who have not logged in for the last six months.
	Send To (Administrators)	Multi Select List	- Organisation Administrators	No	This field will be populated with the names of the administrators for the organisation selected in the list

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					above. The application admin will be able to select the administrators that they wish to receive the email. The application should filter out admin users who have not logged in for the last six months.
			-		
			-		
	Template	Drop Down	Templates	No	This field will be populated with the email templates that the application admin had created previously. If one is selected, the email text should be populated with the text of the template email.
	Subject	Text Field	String	Yes	This field will be used by the application admin to capture a subject line for the email.
	Text	Text Field		Yes	This field will be used by the application admin to edit the email that they want to send.
	Cancel	Button			The application admin will use this button to cancel. Once clicked, the email should be discarded, and the application admin user should be navigated back to the organisation page.
	Save as template	Button			The application admin will use this button to save the email as a template. Once selected, the application admin will be presented with a window to enter the template name and save the template.
	Send	Button			The application admin will use this button to send the email. Once clicked, the application should validate that recipients were selected and that the email body contains content. If either of these

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					validations fail, the user will be presented with a message warning them of this. If the validations pass, the email will be sent to the recipients.
	Schedule Send	Calendar Drop Down	Date Time	No	This field will allow the application admin to select a date and time in the future for the email to be sent.

Emails Sent

The emails sent section of the communication page will consist of the following table:

Column Name	Column Type	Column Data Type	Column Rules
Email ID	Text Field	String	This column will contain the ID of the email.
Organisation	Text Field	String	This column will contain the name of the organisation to which the email was sent.
Subject	Text Field	String	This column will contain the subject of the email.
Number of Recipients	Text Field	String	This column will contain the number of recipients that the email was sent to.
Sent Time	Text Field	String	This column will contain the date and time that the email was sent.
Open Rate	Text Field	String	This column will contain the percentage of recipients who opened the email.
Action	Button		This column will contain a button to view the email that was sent. Once clicked, the application should present the application admin with a window that displays the email content.

Email Templates

The email templates section of the page will consist of a button to create a new template and a table listing the templates that have been created. When the application administrator clicks on the button to create a template they will be presented with a window to create the template and save it.
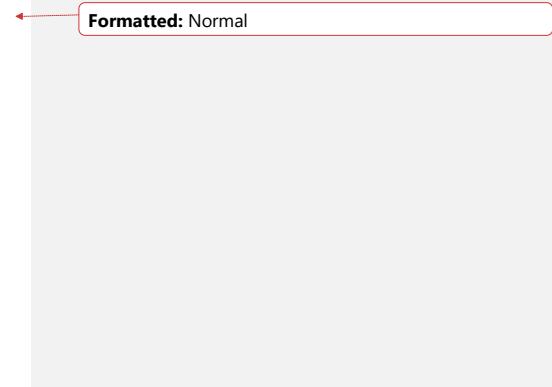
The table for email templates will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Template Name	Text Field	String	This column will contain the name of the template.
Created By	Text Field	String	This column will contain the name of the application admin that created the template.
Created	Text Field	String	This column will contain the date and time that the email template was created.
Last Updated	Text Field	String	This column will contain the date and time that the email template was last updated.
Updated By	Text Field	String	This column will contain the name of the application admin that updated the template.
Actions	Button		This column will contain buttons for the application administrator to view the template, edit the template and delete the template. If the edit button was clicked, the application admin will be presented with a window where they can edit the content of the template. Once the template is updated, the last updated date and time should be updated. If the view button is clicked, the application admininstrator will be presented with a screen that allows them to view the template. If the delete button is clicked, the template will be deleted from the list of templates.

Finance

The application administrator will be navigated to the finance page. The finance page will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Finance Section Heading	TextField	String	N/A	The application will populate field with the text "Finance"
	Back	Button		N/A	This button will be used by the application administrator to navigate back to the application admin home page.
	Debtors	TextField	String	N/A	This field will be populated by the application with the amount that is outstanding to Membi.
	Creditors	TextField	String	N/A	This field will be populated by the application with the amount that is owed by Membi.
	Account Search	Search Field			The application administrator will use this field to search for a organisation account. The application will present the organisations that meet the search criteria. If the user clicks on an

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					organisation, the user is navigated to the club account page.

Below these fields will be filters that allow the user to filter the results in the table. The filters will consist of the following:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Invoice Due	Radio Button	- Yes - No - Show All	N/A	The application will use this field to filter organisations in the table to those who need to be invoiced, those who do not, and all organisations, by default all will be shown.
	Retired	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the results in the table by organisati that have been deleted, deleted, and all. By default, no be selected.
	Free Trail	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the results in the table by organisations that are on a free trail, not on a free trail retired, and all organisations. By default, all will be selected.
	Member Bracket Exceeded	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the results in the table by organisations that have exceeded the number of members allowed by their current subscription plan, not exceeded the number of members allowed by their current subscription plan, and all organisations. By default, no will be selected.
	Unpaid Embed / API	Radio Button	- Yes - No	N/A	The application administrator will be able to use this field to filter the

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
			- Show All		organisation in the table to show those who have paid for their embed or API feature, those who have not and all organisations. By default, all will be shown.
	Over Transaction Limit	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the organisation in the table to show those who are over their transaction limit, those who are not, those who are not, and all organisations. By default, all will be shown.
	Blocked	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the organisation in the table to show organisations whose administrators have been blocked, have not been blocked and all organisations. By default, all will be selected.
	Renew	Radio Button	- Yes - No - Show All	N/A	The application administrator will be able to use this field to filter the organisation in the table to show organisations whose subscription will be renewed, will not be renewed, and all organisations. By default, all organisations will be selected.
	Account Balance	Radio Button	- Positive - Negatice - Non-Zero - Zero - All	N/A	The application administrator will be able to use this field to filter the organisation in the table to show organisations that have a positive account balance, negative account balance, non-zero account balance, zero account balance and all organisations. By default, all will be shown.

Below this will be a table showing the organisation accounts consisting of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
CheckBox	CheckBox		This column will contain a checkbox allowing the user to select an organisation. The Checkbox in the column name row will be used to select all organisations.
Shortname	Textfield	String	This column will contain the organisation shortname. The text should be clickable and once clicked, will navigate the application admin to the organisation public page.
Name	Textfield	String	This column will contain the organisation name.
Blocked	Textfield	String	This column will contain a "Yes" if the organisation admins have been blocked and a "No" if they have not.
Renew	Textfield	String	This column will contain a "Yes" if the organisation subscription needs to be renewed and "No if it doesn't.
Invoice Due	Textfield	String	This column will contain a "Yes" if the organisation has to be invoiced and "No" if they do not. The text should be clickable. Once it is clicked, the application will calculate the member subscription amount (the difference between the price of the new bracket and the current bracket if the organisation's subscription is still current), premium feature amounts, and transaction amounts that are due for the organisation, it will then populate an invoice with the amount that due with the date that is one day after the end date of the organisations current subscription. The invoice generated will be presented

Column Name	Column Type	Column Data Type	Column Rules
			to the application admin where they can delete items before submitting it.
Balance	Textfield	String	This column will contain the balance of the organisation account.
Members	Textfield	String	This column will contain a the amount of members that the organisation has. If the members is more than 5% higher than the subscription bracket number, it should be coloured in red.
Subscription Bracket	Textfield	String	This column will contain the maximum number of members that the organisation can have on their current subscription.
Start of paid plan	Textfield	String	This column will contain the date that the organisation exited the free trail.
Subscription Expires	Textfield	String	This column will contain the date that the organisation's subscription will expire.
Embed Count	Textfield	String	This column will contain the number of pages that has been embedded.
Embed Expires	Textfield	String	This column will contain the date that the organisation's embed subscription will expire.
API Count	Textfield	String	This column will contain the number of APIs that the organisation has activated.
API Expires	Textfield	String	This column will contain the date that the organisation's API subscription will expire.
Pay Pal Transactions	Textfield	String	This column will contain the number of PayPal transactions that the organisation has done. If the number of transactions is greater than 500 transactions it will be coloured in red.
Opayo Transactions	Textfield	String	This column will contain the number of Opayo transactions that the organisation has done. If the number of transactions is greater than 300 transactions it will be coloured in red.

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Column Name	Column Type	Column Data Type	Column Rules
Stripe Transactions	Textfield	String	This column will contain the number of Stripe transactions that the organisation has done.
Orders	Textfield	String	This column will contain the number of orders that the organisation has received.
Last Admin Login	Textfield	String	This column will contain the date that an admin of the organisation had last logged in.
Account	Button		The user will use this button to view the organisation's account page. Once clicked, the application administrator will be navigated to the organisation account page.

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Below this will be two buttons:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Send Invoice	Button		N/A	The application admin will use button to send an invoice to selected organisations. O clicked, the application should generate the invoices and send them to the organisation email address.
	Clear Down and Remove	Button		N/A	The application admin will use button to clear down the organisation data and remove them from the application. Once clicked the application will perform the clear down and remove for the selected organisations.
	Send Email	Button			The application administrator use this button to send and email to the organisation email. Once clicked, the application admin should allow the user to select one

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					of the saved templates and send it to the organisation.

The application administrator will be navigated to the invoice page when they click on the invoice due link The invoice page will consist of the following Fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Invoice Page Title	Textfield	String	N/A	This field will be populated by the application with the text "New Invoice" followed by the Invoice Number.
	Invoice Date	Textfield	String	N/A	This field will be populated by the application with the date that the invoice is being issued.
	Items	Drop Down	- Invoice Items	Yes	This drop down will be populated with the items that the organisation can be invoiced for. The application admin will be able to select items that will form part of the invoice. Once selected, they will also be able to remove the item from the invoice.
	Amount (excl. vat)	Text Field	String		This field will be populated by application with the amount excluding vat, that is due for the selected item.
	Amount (incl. vat)	Text Field	String		This field will be populated by application with the amount including vat, that is due for the selected item.
	Quantity	Text Field	String		This field will be populated by quantity available for the selected item.
	Total	Text Field	String		This field will be populated by total for the selected item (Amount including VAT x Quantity)

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Sub Total	Text Field	String		This field will be populated by the application with the sum of the total excluding VAT for all the items selected.
	VAT	Text Field	String		This field will be populated by the application with the total amount of VAT charged for each of the items selected.
	Total	Text Field	String		This field will be populated with the sum of the Sub-total and VAT fields.
	Comments	Text Field	String	No	The application administrator will be allowed to capture comments against the invoice.

Below this, there will be buttons for:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Save & Send	Button		N/A	The application administrator will use this button to save and send the invoice to the organisation. Once clicked, the application will queue the invoice to be sent to the organisation super admin.
	Cancel	Button		N/A	This button will be used to cancel the invoice creation. Once clicked, the user will be navigated back to the finance page.

The application administrator will be navigated to the organisation account page when they click on the view button. The organisation account page will consist of the following Fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Organisation Account Page Heading	Textfield	String	N/A	This field will be populated by the application with the text: "Organisation Account" followed by the organisation name.
	Balance	Textfield	String	N/A	This field will be populated by the application with the balance of the club account.
	Edit Organisation Account	Button			The application admin will use this button to edit the organisations account. Once clicked, the application admin will be navigated to a page where they can edit the account.
	View Organisation	Button			The application admin will use this button to view the organisation page. Once clicked, the application admin will be navigated to the organisation page.
	New Invoice	Button			The application admin will use this button to create a new invoice against the organisation. Once clicked, the user will be navigated to the invoice screen to generate the invoice.
	New Magic Invoice	Button			The application admin will use this button to generate an invoice that will calculate the member subscription amount (the difference between the price of the new bracket and the current bracket), premium feature amounts, and transaction amounts that are due for the organisation, it will then populate an invoice with the amount that due with the date that is one day after the end date of the organisations current subscription. The invoice generated will be

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
					presented to the application admin where they can delete items before submitting it.
	New Credit Note	Button			The application admin will use this button to create a new invoice against the organisation. Once clicked, the user will be navigated to the invoice screen to a credit note.

Below this section will be a table that details a summary of the club account. This table will consist of the following:

Column Name	Column Type	Column Data Type	Column Rules
Members	Text Field	String	This column will be populated with the number of members that has been linked to the organisation.
Orders	Text Field	String	This column will be populated with the number of orders that the organisation has received.
Last Admin Login	Text Field	String	This column will be populated with the date and time of the last occasion that an organisation logged into Membi,
Subscription Price Options	Text Field	String	This column will be populated with the number of subscription price options that the organisation has created.
Events	Text Field	String	This column will be populated with the number of events bookings that the club has received.
Forms	Text Field	String	This column will be populated with the number of forms that the organisation has created.
Embedded Pages	Text Field	String	This column will be populated with the number of pages that the organisation has embedded.

Column Name	Column Type	Column Data Type	Column Rules
API Count	Text Field	String	This column will be populated with the number of APIs that the organisation has created.
Online Payment Methods	Text Field	String	This column will be populated with the online payment methods that the organisation has activated.
Paypal Transactions	Text Field	String	This column will be populated with the number of Paypal transactions that the organisation has conducted.
Opayo Transactions	Text Field	String	This column will be populated with the number of Opayp transactions that the organisation has conducted.
Stripe Transactions	Text Field	String	This column will be populated with the number of Stripe transactions that the organisation has conducted.

Below this, there will be a table which will detail the assets of the organisation. The table will contain the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Asset Description	Text Field	String	This column will be populated with the name of the service that the organisation uses. (Member Packages, Premium features etc.)
Start Date	Text Field	String	This column will be populated with the date that the organisation started paying for the asset.
End Date	Text Field	String	This column will be populated with the date that the organisation stopped using the asset.
Units	Text Field	String	This column will be populated with the number of units of the items the organisations have. For member packages, the upper limit of the package plan should be displayed.

Below this will be a table that details the invoices that have been generated against the organisation

Column Name	Column Type	Column Data Type	Column Rules
Invoice Number	Text Field	String	This column will be populated with the name of the service that the organisation uses. (Member Packages, Premium features etc.)
Issue Date	Text Field	String	This column will be populated with the date that the invoice was issued.
Items	Text Field	String	This column will be populated with the line items of the invoice.
Amount	Text Field	String	This column will be populated with the amount for the line item.
Quantity	Text Field	String	This column will be populated with the quantity of the item that was purchased.
Sub-Total	Text Field	String	This column will be populated with the total for the item.
Vat @ 20%	Text Field	String	This column will be populated with the vat amount that was calculated on the item.
Total	Text Field	String	This column will be populated with the total including vat for the items.
Status	Text Field	String	This column will show the status of the invoice.
Status Date	Text Field	String	This column will show the date that the status was allocated to the invoice.
Action	Buttons		This column will contain buttons for the application administrator to view details of the invoice and download a pdf of the invoice. Once the view button is clicked, the row will be expanded to show the payments and refunds that have been captured against that invoice. Once the download button is clicked, the application will generate a pdf file and download it to the device of the application administrator.

Once the application administrator clicks on the button to view the invoice, the application will expand the table to show the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Type	Text Field	String	This column will be populated with the type of transaction. (Payment, Refund).
Date	Text Field	String	This column will contain the date that the transaction was recorded.
Method	Text Field	String	This column will contain the payment method for the transaction. If the method was automated from Xero, this column should be populated with "Unknown from Zero".
Amount	Text Field	String	This column will contain the amount of the transaction.
Comments	Text Field	String	This column will contain any comments that was captured against this transaction.

The window for issuing a credit note against the invoice will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Invoice Number	Drop Down	Invoices	Yes	This field should be populated with the invoices that have been generated for the organisation that have not been paid. The application administrator will use this field to select the invoice they are capturing a credit note against.
	Comments	Text Field	- String	Yes	The application admin will use this field to capture a comment against the credit note.
	Cancel	Button	-		This button will be used to cancel the credit note capture. Once clicked, the user will be navigated back to the organisation account page.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Confirm	Button	-		This button will be used to confirm the credit note capture. Once clicked, the credit note details will be saved against the invoice with the current date as the credit note date.

When the application administrator clicks on the edit account button, they will be presented with a window to edit the account details. The window will consist of the following fields:

Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Seo Name	Textfield	String	N/A	This field will be populated with shortname of the organisation. This field will not be editable.
	Name	Textfield	String	N/A	This field will be populated with name of the organisation. This field will not be editable.
	Renew	Checkbox		No	This field will be used by application administrator indicate if the organisation will renew or not. By default, this box will be checked.
	Block Admin	Checkbox		No	This field will be used by the application administrator to indicate if the organisation administrators should be blocked. By default, this box will be checked.
	Comments	Textfield	String	No	This field will be used by application administrator to capture comments against the organisation account.
	Cancel	Button			This field will be used by the application admin to cancel. Once clicked, any changes will be discarded, and the application admin will be navigated back to the organisation account page.

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Field Number	Field Name	Field Type	Field Data Type	Required?	Field Rules
	Save	Button			This field will be used by the application admin to Save. Once clicked, the comments captured should be saved against the organisation account and if the renew checkbox is unchecked, the organisation should change to a non-renewing organisation. If the block admin checkbox is checked, the organisation administrators should be prevented from accessing the organisation.

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.

Scheduled Jobs

The administrator will be navigated to the scheduled jobs page when clicking on the link in the navigation menu on the home page.

The scheduled jobs table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Job ID	Text Field	String	This column will contain the ID of the job.
Job Name	Text Field	String	This column will be populated with the name of the job.
Job Status	Text Field	String	This will be populated with the status of the job. [Active, Paused, Finished, Finished with Error, Scheduled]
Repeated	Text Field	String	This will be populated with "Yes" if the job is scheduled to run repeatedly and "No" if it is not scheduled to run repeatedly.
Schduled	Text Field	String	This will be an indicator of schedule that the job is set to run on in the form of a chron expression.
Actions	Buttons		This column will contain buttons to Run the job pause the job if it is currently Active, Pause the job if it is currently running and remove the job completely.

The scheduled jobs required on Membi will be the same as those on the current WebCollect, except for the following:

- Update Google Rankings
- Shift Template Events
- Article Popularity
  Clean Orphan Data Invoice (Out of Scope) & Finance

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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 (Out of Scope)

This component will allow support emails to be brought into a ticketing system for the user and will allow the application admin to delegate tickets to another user.

Audit Logs

The application administrator will be navigated to the audit logs page when they click on the audit logs link in the side menu on the application administrator home page.

The audit logs page will consist of a table detailing the sessions. The columns of the table should be sortable and be searchable to allow the application administrator to locate a specific log. The table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
IP Address	Text Field	String	This column will contain the IP Address of the user for the session log.
Sample Time	Text Field	String	This column will contain the date and time of the start of the session log.

Column Name	Column Type	Column Data Type	Column Rules
Has non-public pages	Text Field	String	This column will contain a "Yes" if the log contains non-public pages and a "No" if it doesn't.
Page Count	Text Field	String	This column will contain a number that indicates the number of pages in the session log.
Actions	Button		This column will contain a button to view the session log. Once clicked, the application admin should be navigated to a page where they can view the session log.

The application administrator will be directed to the session log page once they click on the view button on the audit logs page. The session log page will consist of page heading, a summary table and a table showing the logs for the session.

The page heading will consist of the text: "Last Login Session for:" and the user name and email address, and the date and time of the logs.

The summary table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Page Count	Text Field	String	This column will contain the number of pages in the session log.
Duration	Text Field	String	This column will contain the duration of the session in the format HH:MM:SS.
IP Address	Text Field	String	This column will contain the IP Address of the user for the session log.
Host	Text Field	String	This column will contain the Host Address of the user for the session log.
Location	Text Field	String	This column will contain Location of the user for the session log, based on their IP Address.
Initial Referrer	Text Field	String	This column will contain the page the session started on.
Initial User Agent	Text Field	String	This column will contain details of the browser the user used for the session.

The session logs table will consist of the following columns:

Column Name	Column Type	Column Data Type	Column Rules
Time	Text Field	String	This column will contain the time that of the user action.
Method	Text Field	String	This column will contain the method of the user action (GET, POST)
Page	Text Field	String	This column will contain page structure of the page where the user action took place.
Code	Text Field	String	This column will contain the HTTP code for the user action.

Integrations

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

Payments (Out of Scope)

- o GoCardless – Direct Debits, Subscription Payments, Instalments
- o Paypal – Online Payments
- o Opayo – Card Payments
- o Stripe - Apple Pay, Google Pay, Direct Debits, Direct Debits, Subscription Payments, Instalments

Organisation API (Out of Scope)

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

Accounting (Out of Scope)

- o Xero

Access Control (Out of Scope)

- o Key Fob / Door access

Communication (Out of scope)

- o Mail Chimp

Other

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