

## Requirement document

### Overview

- The hierarchy National Directory of Art of Living members' starts with Trustees -> State Apex members->
- Taluk coordinators -> Village coordinators.
- There would be 5 to 6 trustees who would further have their assistants. Every trustees has been given states to handle.
- They will be point of contact to those particular states.
- In the particular states there would be 5 – 10 Apex members [Branch head].
- Apex members will be assigned in a state for particular zones, under each zone the particular villages would report to them.
- In each state the clusters are made for the chain system.
- Every State will be assigned with one accountant / CA and one or two bank accounts will be assigned to each states.
- The CA operates all the compliance required for the financial aspect.
- The bank account will be there to see the transactions, ticket booking or the Guru Dev's events are happening it should be in that particular account of that State.
- These information should be able to viewed by the trustees' office (No finances) but only the people involved and bank accounts, IFSC code of what account has been opened, branch address of that particular State [Refer Excel sheet for the Fields to be captured- Link in the document shared].
- Apex members will be changed every two years, so every two years new team will be formed on the State level. It could be possible that the tenure can be increased or they will still be the part of Apex but as a former Apex member like advisory.
- Admin or the assigned person should be able to update the tenure of members, when they have left the voluntary seva or are they continuing as advisory or former apex member [Tabs are given which is required in dashboard view].
- Around 150 Apex members would be, 40-50 Taluk members and 30 – 40 of Village members, so overall 200 members login per State.
- Login will be with Email and password.

### Roles of members:

1. They have to generate the social projects in the respective States and Guru Dev's visit as they will entirely be responsible for his entire event.
2. Before the event starts, they might want to open a small bank account or they might need some letters that should be issued to the State government.
3. Only the Apex members should be able to create a ticket or create a request to the head office and the ticket dropdown menus will also be fixed or pre-defined [Bank account letter, appointment letter or miscellaneous letter and they have to mention the details in the description]
4. Details like who it is for, where, why and by when it is required & there would be a date tab by when they need the letter.

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5. The complete process triggers to the head office/ the trust office logins. They will take the request and do the necessary editing of the word file, convert to pdf and upload on their respective tickets and they will be notified on their registered email that your document is ready to download.
6. The request for the documents will only be by Apex members and not by other members and on behalf of other members, Apex members should only raise the request.
7. And Apex members can download the documents and send to the other members outside the system [Via whatsapp / email].

### **Profile**

1. Members and all the users should be able to edit their profile but the approval for the edit should be sent to the head office so that what changes the users have made can be tracked or known by the head office that is head office should be notified.
2. Updating the profile should be maximum of dropdowns [Pre-defined data] and not input or text.
3. They can enter the pin code and all the address [State, city, taluk, and village] details will be captured & only the street address or building number etc should be entered by the users.
4. Every users' dashboard will have the announcements of meetings etc [Admin should be able to send a message or enter text which will go as announcement to users] and notifications.
5. All the Apex members of respective state only should see their details or maps, they should not be able to see the entire India map in their dashboard.

### **Conditions**

1. If they have been completed their tenure, automatically their profile should get deactivated so while creating the user, the tenure date should also be mentioned.
2. The account should be deactivated once the tenure is expired
3. ID card will only be generated if they have completed their profile 100%. If any fields are missing or they have not updated, they should not be able to generate ID card.
4. And on dashboard admin should be able to see any upcoming projects of each state, the view of entire India would be of Trustee's view. The whole India map view, only the Trustees would be able to view and they will see what States are assigned to them on their respective logins [Data to be given by the client].

### **Projects – 2 ways**

1. When they raise service ticket, there will be a category where is it a project or office requirement [Details to be given by the client].

### **Reports**

- In reports admin should be able to see how many Apex members have joined, how many are active or non- active, how many bank accounts are opened etc should be in pdf or excel report.

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- A complete report with multiple filters will be given based on which admin can filter and view the data and download the reports or track it [Reports of members, accounts, status etc].

### **Digital ID card**

- Design to be shared by the client.
- The users will enter the details and open the app, click on ID card and ID card will be opened which they can show as their digital card.