* Member Cards

Note: Transfer and Transaction are easily confused – I hope I didn’t miss any reference on the screen. “Transfer” or “Transfer Settings” refers to the template for sending money (when, how much, where to etc.) “Transaction” refers to the actual sending of money (according to the parameters defined in the transfer settings).

* Risk

Like Org/Loc

* Notes

Like Org/Loc

* ID Document

|  |  |  |
| --- | --- | --- |
| Line | Card | Hover |
| Header | Document Type | |
| Body 1 | ID Number | |
| Body 2 | “Expires “ + expiration date | |
| Body 3 | “Issued by “ + issuing country or State + “/” + country, if state is available | |

* Employment

Show only employments in setup/active status.

|  |  |  |
| --- | --- | --- |
| Line | Card | Hover |
| Header1 | Location (links to loc view) | |
| Header 2 | Organization (links to org view) | |
|  | Status indicator (for setup/active/inactive) TBD, skip for now | |
| Body 1 |  | Job title (if available, otherwise skip) |
| Body 2 |  | “Hired “ + hire date (if available, otherwise skip) |
| Body 3 |  | “Pay at enrollment USD ” + amount + frequency – skip if unavailable  Frequency:  **Pay Cycle Skips: 0**  every paycycle  **Pay Cycle Skips > 0**  every [pay cycle skips + 1] paycycles |
| Body 4 |  | “Average pay USD” + amount + frequency (see above), skip if unavailable |
| Body 5 | For “Setup” employments: “Added “ + creation date\*  For “Active” employments: “Enrolled since” + activation date\*  For “Inactive employments: “Enrolled “ + activation date + “-“ deactivation date”. If there is no activation date, “Deactivated “ + deactivation date | |
| Body 6 | “Next transaction “ + next payroll date for location | |
| Body 7 | “ Total Transactions (last 7|30|365 days)” or “No past transactions”. | |
| Body 8 | USD 100 | USD 1000 | USD 8000 (replace with amounts, skip if none) | |
| Body 9 | count of active transfers + “Transfers to “ + recipient count + “ recipients” or “No active transfers”. | |

\* We need a discussion on how to track status dates – this may not be available in all situations.

* Transfer

|  |  |  |
| --- | --- | --- |
| Line | Card | Hover |
| Header1 | “To” + Recipient name (links to recipient view); link title should include Recipient Id | |
| Header 2 | Transfer Id | |
|  | Status indicator (for setup/active/inactive) TBD, skip for now | |
| Body 1 | City/state/Country | |
| Body 2 | “USD “ + amount “ every “ + nth (from pay cycle skips + week/month where we can derive that from the payroll settings; else just use word “payroll” | |
| Body 3 | Plan name + “ Plan (“ + Fee USD ” + Fee based on plan +” ) | |
| Body 4 | “Promotion (USD “ + Fee +”) until “ + end date; skip if not applicable | |
| Body 5 | “Payable in” + currency (3-letter code) | |
| Body 6 | Payer +Transfer Method | |
| Body 7 | Tx count for this Transfer + “Transactions (total USD” + total transaction amount + “)” | |