

1. Bulletin

Goal: Keep it minimal and document-driven.

Required fields only:

- **Title** (string)
- **Date to Display** (shown in frontend)
- **Publish Date** (backend scheduling)
- **Upload PDF** (drag & drop)

Optional/Removed:

- No quick links, tags, or extra metadata.
- Search and filtering in the **listing view** is retained (for admins to find bulletins).

→ End result: A bulletin is essentially a scheduled PDF with a title and display date.

2. Events

Current status: Already close to ideal.

Fields to keep/improve:

- **Title + Description**
- **Event Type / Category** (dropdown or multi-select)
- **Tags** (optional)
- **Date & Time** (start is required, end optional — allow skipping end time)
- **Recurring toggle** (optional)
- **Mode:** Physical / Online / Hybrid
- **Ticketing:**
 - RSVP (free registration)
 - Paid (either collect via external URL OR generate link via our module)

Media & Publishing:

- **Image** (required)
- **Video** (optional)
- **Publish / Schedule** (works as in bulletins)

→ End result: Events are flexible (can be simple RSVP, or extended with external paid ticketing integration).

3. Notice Board

Goal: Simple announcements with auto-expiry.

Fields to keep:

- **Title + Description**
- **External Link** (optional)
- **Start Date (publish date)**
- **Archive Date** (after which notice is auto-hidden)

➡ End result: A notice has a clear lifespan — goes live, stays visible, and archives automatically.

Contacts

Purpose

Single place for adult contacts with basic profile + tags (membership, groups, volunteer, etc.) and a “source” for where the contact came from.

Create/Edit Fields

- **Full Name** (*required, string*)
- **Email** (*optional, email*)
- **Phone** (*optional, E.164 preferred*)
- **Tags** (*multi-select, optional*)
 - Examples: Member, Volunteer, Group:<GroupName> (auto-added when added to a Group), other custom tags
- **Source** (*required, enum*): Website | Manual | Family Records | Import
- **Date of Birth** (*optional, date*) — used only to determine adulthood
- **Gender** (*optional, enum*): Male | Female | Non-binary | Prefer not to say | Other
- **Address** (*optional, structured or single-line*)

Visibility / Privacy Rules

- **Adult-only directory:** Only contacts who are **18+** (based on DOB) **or** with no DOB provided are visible in Contacts.
- **Minors are not stored as standalone contacts:** they should be associated under a **Guardian** in “Family Records” (outside this Contacts module’s public list).
 - If a DOB indicates <18, **block save** to Contacts and prompt: “Add under a Guardian in Family Records.”

Validation & De-dupe

- At least **one** of Email or Phone is recommended; allow save without but warn.

- **Soft de-dupe** on (Email) OR (Normalized Phone). If potential duplicate, show a merge dialog.
- Normalize phone numbers to E.164 on save if possible.

Listing & Filters

- Columns: **Name, Email, Phone, Tags, Source, Created On**
- Quick search: name/email/phone
- Filters: **Tags, Source, Has Email, Has Phone**
- Bulk actions: **Add/Remove Tag, Export CSV, Merge**
- Import CSV (optional, later): map columns; preview; tag-on-import; de-dupe on import.

UX Notes

- Tagging is the primary categorisation; **Groups add a “Group:<Name>” tag automatically.**
- From a Contact’s profile, show “Groups” they belong to (derived from memberships).
- Audit trail: created by, last updated by.

Groups

Purpose

Define community groups and connect members (Contacts) to them. Show leader, simple metadata, and member counts.

Create/Edit Fields

- **Group Name** (*required, unique*)
 - On create, auto-create Tag **Group:<GroupName>** for Contacts.
- **Category** (*optional, selectable list with “Add new”*)
 - e.g., Prayer, Youth, Choir, Service, etc.
- **Description** (*optional, rich text or plain*)
- **Leader** (*optional, Contact reference*)

Meeting times / schedules are **optional**, editable later.

Group Membership

- Add/remove members (Contacts) to the Group.
- When a contact is added to a Group:
 - Add Tag **Group:<GroupName>** to that contact.
- When removed:

- Remove Tag **Group:<GroupName>** from that contact.

Group Detail View

- Header: **Name, Category, Leader**
- Stats: Group Members count
- Tabs:
 - **Members** (list, search/add/remove)
 - **About** (description)
 - **Activity** (optional: recent joins/leaves)

Groups List

- Columns: **Name, Category, Leader, Members**
 - Search by name; filter by category.
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Membership

Purpose

A separate tab for managing all membership records.

Provides administrators with a single place to view member details, manage membership plans, track renewal dates, generate invoices, and handle payments.

The module also supports publishing membership plans to generate external subscription links that members can use to subscribe directly.

Create/Edit Fields

- **Member Details:**
 - Full Name (required, string)
 - Membership Number (auto-generated, unique ID)
 - Email ID (required, email)
 - Start Date (required, date)
 - Renewal Date (required, date) — auto-calculated based on plan interval, editable by admin
 - Membership Duration (auto-calculated: time since Start Date)
- **Plans:**
 - Plan Name (required, string)
 - Plan Interval (required, enum): Monthly | Yearly | Lifetime

- Plan Amount (required, currency)
 - Status (required, enum): Draft | Active | Expired
 - Publish Plan (boolean toggle) — when active, generates external subscription URL
 - **Invoices/Payments:**
 - Invoice Number (auto-generated)
 - Amount (required, currency)
 - Status (required, enum): Open | Paid | Overdue
 - Gateway (enum): Stripe | Razorpay | PayPal | Manual
 - Receipt URL (optional, link)
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Admin Actions

- Add New Member
 - Add New Membership Plan
 - For mid-cycle joins, allow admin to choose billing type:
 - **Full Charge:** Charge the full plan amount regardless of when the member joins.
 - **Prorated Charge:** Calculate and charge only for the remaining months in the plan cycle.
 - Publish a membership plan to create an external link for self-subscription.
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Visibility / Privacy Rules

- Membership tab is admin-only; not accessible to regular members.
 - Only active members are listed in the Membership table by default; filters can show expired/canceled.
 - Published Plan links are accessible externally, but only for **Active Plans**. Draft or expired plans cannot be subscribed.
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Validation & De-dupe

- Membership Number must be unique.
- Email ID required for each member (soft de-dupe on email).
- Prevent duplicate active memberships for the same user unless explicitly allowed.
- Renewal Date cannot be earlier than Start Date.

Records

Purpose

A centralized tool to help businesses or communities stay on top of recurring compliance tasks, audits, registrations, and safety checks.

The module stores details of each compliance requirement, tracks due dates, sends proactive notifications, and maintains renewal history with supporting attachments.

Create/Edit Fields

- **Service Name** (required, string) — e.g., “Work Health & Safety Audit”, “Insurance Renewal”, “Test & Tag Check”
 - **Service Number / Identifier** (optional, string) — unique tracking ID if needed
 - **Due Date** (required, date) — the date the task or record is due
 - **Notification Date** (required, date/time) — when to notify before due date
 - **Comments / Notes** (optional, text) — hidden until due, for instructions or special notes
 - **Completion Date** (optional, date) — when the task was completed
 - **Renewal Date** (optional, date) — when the task was renewed (for ongoing services)
 - **Attachment(s)** (optional, file upload) — insurance certificate, audit report, registration doc, etc.
 - **Status** (enum): Upcoming | Due | Completed | Overdue
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Admin/Member Actions

- Add New Record (service entry)
 - Edit Record (update due date, completion, renewal info, attachments)
 - Mark as Completed
 - Upload supporting documents
 - Set or Adjust Notification Schedule (X days/weeks before due)
 - Export Records (CSV/PDF)
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Notification Rules

- Email/Push notifications triggered based on **Notification Date**.
 - Escalation if **Due Date** passes without marking as completed → “Overdue” alert.
 - Option for recurring reminders (e.g., every 12 months for WHS audit).
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Visibility / Privacy Rules

- Records visible only to admins or designated compliance officers.
 - Attachments secured with role-based access.
 - Sensitive notes hidden until due (to avoid clutter or accidental disclosure).
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Validation & De-dupe

- Service Name + Due Date should be unique for active records (prevent duplicate entries for the same service cycle).
 - Attachments checked for allowed MIME types.
 - Require Due Date and Notification Date before save.
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Listing & Filters

- **Table Columns:** Service Name | Due Date | Status | Notification Date | Completion Date | Renewal Date | Actions
 - **Quick Search:** Service Name / Service Number
 - **Filters:** Status (Upcoming/Due/Completed/Overdue), Service Type, Date Range
 - **Bulk Actions:** Export Records, Mark Multiple Completed, Change Notification Schedule
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Example Use Cases

- Annual Work Health & Safety audit — tracked with notification 30 days prior.
- Insurance renewal — upload policy, set renewal date, and auto-reminder.
- Equipment Test & Tag — due quarterly, mark as completed when finished.
- Vehicle Registration — add renewal date, upload registration slip, receive alerts.

Family Records

Purpose

A dedicated module for managing families as collective units, rather than individual contacts. Supports church, school, or community organizations where families are the primary record type.

Provides visibility into all members, their roles, and their sacramental records while keeping minors linked under a guardian.

Family Directory Page

- **Search Bar:** Search by family name, main address, or phone number.
 - **Filter Options:**
 - Status: Active | Inactive
 - Newly Registered Families
 - Demographic Tags (e.g., Parish Zone, Ethnicity, Program Enrollment)
 - **Families Table/List:** Columns include:
 - Family Name
 - Primary Contact Info (phone/email)
 - Address
 - Registration Date
 - Quick Actions: View | Edit | Message
 - **Add New Family Button:** Opens a structured form for creating a new family record.
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Family Profile Page

- **Header Section:**
 - Family Name
 - Main Address
 - Primary Contact Numbers
 - Registration Date
- **Members Section:**
 - List all family members with: photo/avatar (or initials), role/relationship (Father, Mother, Child, Guardian, etc.), date of birth, and contact info.
 - Ability to add or edit members.
- **Emergency Contacts:** Clearly display designated emergency contact numbers.
- **Sacramental Records Panel:**
 - For each family member, show sacraments (e.g., Baptism, Confirmation, Eucharist, Marriage).
 - Use icons or badges to indicate completed sacraments.
- **Notes Section:** Free-text area for pastoral care notes, special circumstances, or family history.
- **Actions Panel:**
 - Edit Family Info

- Add Member
 - Record Sacrament
 - Print/Export Data (PDF/CSV)
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Individual Member Sub-Pages (From Family Profile)

- **Personal Details:**
 - Full Name
 - Contact Info
 - Relationship to Family
 - Date of Birth
 - Photo/Avatar
 - **Sacramental Record:**
 - Chronological list of sacraments with:
 - Type (Baptism, Confirmation, etc.)
 - Date
 - Location (Parish, Church)
 - Editable for corrections or updates.
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Visibility / Privacy Rules

- Only adults appear in general **Contacts**; children remain accessible only under **Family Records**.
 - Sacramental data is visible to administrators/pastoral staff only; not public.
 - Sensitive notes are admin-only and not exportable unless authorized.
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Validation & De-dupe

- Require at least one guardian/adult contact for each family.
 - Soft de-dupe on Family Name + Address or Primary Phone.
 - Prevent duplicate sacrament entries for the same individual (e.g., two baptisms).
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Listing & Filters

- **Family Directory Table Columns:** Family Name | Primary Contact | Address | Registration Date | Status

- **Filters:** Status, Registration Date, Demographic Tags, Has Sacraments Completed
- **Bulk Actions:** Send Message (Email/SMS), Export CSV, Tag Families

Volunteers

Current status: New module required for applications + compliance tracking.

Fields to keep/improve:

Personal Details

- Full Name (required)
- Previous Names/Aliases (optional)
- Date of Birth (required; must be 18+)
- Gender (enum)
- Address (required)
- Phone (required, E.164)
- Email (required)

Emergency Contact

- Name (required)
- Relationship (required)
- Phone (required)

Volunteer Role & Ministry Area

- Role/Position (required)
- Ministry Areas (multi-select: Children's, Youth/Young Adults, Choir/Music, Pastoral Care, Hospitality, Other)

Compliance Check

- Check Type (WWCC / Blue Card / Vulnerable People Registration)
- Registration/Card Number (required)
- Issuing State/Territory (required)
- Expiry Date (required, must be future)
- Upload Registration Card/Letter (required)
- Compliance Status (enum: Yes | No — block submission if “No” and provide external link to apply)

Identity Verification

- Upload Primary Photo ID (passport, driver's licence)

- Consent (required checkbox: authorize identity & card verification with third-party)

References

- Reference 1: Name, Relationship, Phone/Email (all required)
- Reference 2: Name, Relationship, Phone/Email (all required; must be unique individual)

Consent & Declaration

- Declaration (required checkbox: information true & correct)
- Consent (required checkbox: allow processing of background checks)
- Acknowledgment (required checkbox: must notify if criminal status changes)
- Signature & Date (typed name + checkbox OR digital signature)

For Office Use Only

- Received By (staff name) + Date
- Background Check initiated (checkbox + date)
- Status Verified (Approved | Not Approved, with date)
- Expiry/Review Date (date)

Validation Rules

- DOB must confirm 18+
- Expiry date must be in the future
- References must be unique
- Consent checkboxes must be ticked
- Soft de-dupe on (Full Name + DOB + Email)

Admin View: Listing & Filters

- Columns: Name | Role | Ministry Areas | Registration Number | Expiry Date | Status | References Complete
- Quick Search: name, email, card number
- Filters: Ministry Area | Status (Pending, Approved, Expired) | Expiring within 30/60/90 days
- Bulk Actions: Send Reminder | Export Records | Initiate Background Check

 **End result:** Volunteers can apply via a structured form; admins manage compliance, background checks, expiry tracking, and reminders in one central repository.

Forms

Current status: Needs to be built.

Fields to keep/add:

- **Form Name** (required)
- **Description** (optional)
- **Status** (Draft / Published / Archived)
- **Field Types (drag-and-drop builder):**
 - Text Input
 - Textarea
 - Dropdown (single-select)
 - Multi-select Checkbox
 - Radio Button
 - Date Picker
 - File Upload
 - Consent Checkbox
- **Field Settings:** Label, Required toggle, Placeholder, Default value (optional)
- **Published URL** (auto-generated when form is published)

Responses:

- Submissions stored in a table with ID, Date Submitted, and expandable Submitted Data.
- Export option (CSV/Excel).

Publishing & Usage:

- Each form can be previewed, saved as Draft, or Published.
- Published forms generate a **shareable URL** that can also be linked into other modules (e.g., Volunteers, Membership, Records).
- Archived forms remain stored but are not active.

➡ End result: Forms are flexible, reusable, and can be embedded across the application via published links.