**SCOPE OF WORK**

**Database**

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| **Wild Apricot functionality addresses example Business Requirements**  **Everything in the business requirements column can be accomplished with Wild Apricot, out of the box.** | |
| **Wild Apricot Approach** | **Sample Business Requirements** |
| Membership Levels and Renewals  **The** [**Membership**](https://gethelp.wildapricot.com/en/articles/132) **functionality in Wild Apricot can accomplish most if not all of this functionality. Using the** [**bundle membership**](https://gethelp.wildapricot.com/en/articles/164) **feature, one can create a membership that contains 2 or more people that renew together under 1 plan.**  **Digital membership** [**cards**](https://gethelp.wildapricot.com/en/articles/141-membership-cards) **are available, and all membership levels can have individual renewal policies.**  [**Custom membership fields**](https://gethelp.wildapricot.com/en/articles/149-adding-and-modifying-database-fields) **can store information about certification status as well as examination results.**  **Reports and** [**advanced searching capability**](https://gethelp.wildapricot.com/en/articles/156) **is possible on all membership data.**  [**Membership directories**](https://gethelp.wildapricot.com/en/articles/390) **are available and can restrict which fields to show to the public and to members. Each member can also** [**restrict which fields**](https://gethelp.wildapricot.com/en/articles/147) **are shown to members.** | * Memberships run from Jan 1-Dec 31 each year. * Renewal notices are generated and sent out in November each year * Members can renew online or via a hard copy paper invoice (need to have the ability to register from admin side if renewing with paper) * Member Types: National, Student, Organization (either Institutional or Business), Member of Distinction (complimentary), Staff * Organization Members have the ability to identify 2 National members as part of their membership. * Two different price points for each member type (early-bird rates and regular rates) – need the ability to adjust these prices or add a fee to early-bird rate. * Once a member renews, they will receive an automatic Email Confirmation and receipt * New members can sign up online * New Members will receive an Introductory Welcome Letter Email and a digital member card * When someone wants to set up a new membership, the database will be checked by email and/or name to ensure no duplicates are created * National members who have taken an exam must renew their membership each year. They have a maximum of 2 years to back pay their membership in order to keep their designation * During the renewal cycle, members who have taken an examination are asked if they would like a certification sticker to be mailed to them. This needs to be tracked and a report is pulled every few months * The ability to ask if they would like to be listed in on-line directory and what information they would like displayed (name, organization, email, phone number, address) |
| Contacts  [**Members are a specific form of a contact record**](https://gethelp.wildapricot.com/en/articles/156)**. Contacts can have a set of contact fields which are inherited for members.**  **Assigning regional chapters can be done via** [**membership groups**](https://gethelp.wildapricot.com/en/articles/166) **or using a drop down. This can be done during** [**import**](https://gethelp.wildapricot.com/en/articles/19) **but there is no function to automatically assign members based on postal code boundaries.**  **All email marketing features can have** [**optin**](https://gethelp.wildapricot.com/en/articles/38)**, as Wild Apricot is CASL compliant.** | * Information collected on all contacts: * Member # (automatically generated for new members, also currently used as their user ID when logging into the database) * Name, Company and Job Title * Ability to enter Home or Work details (Address, Phone, Email) and the ability to select primary contact information * Members are automatically sorted into a Regional Chapter based on their postal code * Primary Language (French/English) * Ability to opt out of emails * Ability to opt out of receiving members magazine * Members should have the ability to update their own profile information and use an automatic “Forget my password” function if they are having trouble logging in * Notes – These would be internal notes for admin users |
| Custom Fields  **The** [**custom fields**](https://gethelp.wildapricot.com/en/articles/149-adding-and-modifying-database-fields) **feature for both contacts and members can be used to identify extra information for every record. The requirements described can be addressed with the custom fields functionality which can be modified on the fly without any technical expertise. The** [**import**](https://gethelp.wildapricot.com/en/articles/19) **feature can enforce integrity during import to ensure the custom fields are properly maintained.** | * Credentials (a list of credentials are available for the member to select as many or as little as they would like to be recognized as) These credentials are also listed in the Member Directory (see below) * Certification Title (after passing a certification, the member is recognized at that level) * Year Certification was obtained * If a member has lost their certification, we keep track of what certification they used to have in case the member decides to rejoin * Continuing Education Audit (If a member has completed the audit, the year is noted so that they are not selected for 5 years to complete another) * Volunteers (if a member has volunteered for the organization and what year they volunteered, or if they are interested in volunteering) * Demographics (we have a list of demographics that the member can select as many or as little as they would like) * Categories for Organizations for the Member Directory (we have a list of various categories that a member can select as many or as little as they would like) |
| Continuing Education Credits  **Using the custom fields feature, this type of information can be maintained, but it is not linked to any external learning management system. If there is a requirement to import external data to update continuing education fields, this is possible with the out of the box data export/import functionality.** | * Members can track their continuing education credits through the system. * A sample list of continuing education credits at [this link](http://calas-acsal.org/Apps/Pages/education) * The member will have the ability to select from a list of Common Credits, and make notes (i.e. dates attended sessions, articles read) |
| Certification  **This functionality can be accomplished with an external forms builder. We recommend** [**Formstack**](formstack.com)**. This system can design custom forms to collect a variety of information. Fields can also contain conditional logic to show/hide data to be collected based on a variety of conditions.**  **This information can be stored in the Formstack system, exported to an Excel file or even automatically routed to a spreadsheet during submission. The form can also charge for certification under specific conditions if necessary.**  **Email notifications and receipts can be sent out of Formstack, with customized content and information from the submission embedded dynamically in the emails.**  **Formstack contains an approval system that can route submissions to be declined or approved. Advanced workflow functionality can also allow other administrators to add information to the submission, including digital signatures.**  **Uploads of files and pictures are available as well as downloads of certain files.**  **Formstack features are copious and are fully described at** [**www.formstack.com**](http://www.formstack.com)**.**  **The pass/fail information as well as the type of certification can be exported out of Formstack and integrated into the Wild Apricot database by the unique ID generated in Wild Apricot for all contacts and members.** | * Applicants will apply online for their examination between August and October 1st only * Current online process:   + Step 1: Member Info   + Mailing address, phone number, email etc.   + Step 2: Communication   + You will be asked to confirm how you would like to communicate with you   + Step 3: Employment   + You must include the name of your employer, your job title, types of animals that you worked with, and the time frame you were employed   + Step 4: Education   + You will be asked to include all relevant certifications, degrees and schools you have attended   + Step 5: Documents   + Please indicate any special accommodations that you may have   + Please scan and attach all documents relevant to your application; resume, letter from employer, degree, diploma, transcripts etc.   + Step 6: Exam Selection   + Applicants can select their exam site (20 within Canada) and the approximately 15 different exam levels. They can also select if they would like a hard copy or cd version of the examination (Eventually moving to a reading list option). *Note: 2 or 3 exam types are available after the October 1st deadline for College students.*   + Step 7: Review   + Please review all information to ensure that it is correct   + Step 8: Payment   + You will be charged a non-refundable application fee of $30+ HST (13%) when you complete your application. * Applicants will receive an automatic email confirmation when they have applied * Currently a report is generated from the system, which is sent to the review team (along with all the documents) so that applicants can be approved/denied their application * Ability for easy download of all documents to share with review team (or give them access to review only exam candidates in system) * If a candidate is denied, an email is sent to them explaining why * If a candidate is approved, they will receive a congratulatory email, with an invoice. Each invoice incudes the exam fee, study material (different for each exam level), and a membership for the following year. i.e. if they have applied for an exam in 2018, the exam takes place in 2019 so the membership is for 2019. * Admin users will have the ability to track if a candidate has passed, failed, withdrawn, no-show, etc |
| Store Orders  **A new** [**online store**](https://gethelp.wildapricot.com/en/articles/1570) **feature launched in March 2018 to allow purchase of merchandise. Pricing can be different for members and non-members. Currently tax and shipping has to be built into the base price as the Store feature does not support dynamic shipping or taxes.** | * Members can have the ability to purchase products online (text books, swag, etc) * Ability to have member and non-member pricing * Organizations can purchase member magazine adverting |
| Accounting  [**Wild Apricot Payments**](https://gethelp.wildapricot.com/en/articles/1430) **is the preferred payment gateway as of October 1, 2018. PayPal, Stripe and Authorize.net are also supported.**  [**Financial reporting**](https://gethelp.wildapricot.com/en/categories/15-reporting) **is available in Wild Apricot and will need to be carefully scoped for completeness. Any extra features can be developed using the Excel custom reporting suite developed by NewPath Consulting.**  **There is a primary currency setting in Wild Apricot which governs all transaction which can be set at any point in time.**  [**Wild Apricot is Level 1 PCI DSS compliant.**](https://gethelp.wildapricot.com/en/articles/87#pci) | * System must be PCI Compliant * Members can print receipts through their profiles * Ability to generate invoices and track outstanding payments * Each item (membership, advertising, etc) has individual account codes and will need reporting of daily accounts for easy tracking |
| Reporting  **The** [**Advanced Search**](https://gethelp.wildapricot.com/en/articles/156) **capability can be used to predefine a set of reports which can be run at a moment’s notice. Each report can be exported to an Excel file for further mail merge capability.**  **All membership renewal statuses are available in a dashboard which can easily pinpoint who is yet to renew. Email reminders can automatically and manually be sent to encourage renewals, registration for events or donations.**  **Lists of volunteers can be managed through a member directory or a member group and displayed on the website.**  **NewPath Consulting offers a unique Excel based system to export all relevant membership and auditlog data that can analyze information with graphs and reports.** | * Member Magazine Mailing * Regional Chapter Reports * Unpaid balances * Exam Listings * Members who have not renewed for a particular year * Full Member Lists * Volunteer Lists (to recognize at Symposium) |

**Wish List**

* Sending emails to various groups through the system (Rather than through outlook) – Supported with email marketing
* Event / Conference Registration – **Supported with the** [**event management system**](https://gethelp.wildapricot.com/en/categories/23-getting-started-with-events)
* Prospect list for Sponsors and Exhibitors and various contacts – **Supported using custom fields and searches**
* Ability to group members by committee’s that they are a part of - **Supported with** [**member groups**](https://gethelp.wildapricot.com/en/articles/166)
* Identify award winners in the system – **Supported with custom fields**
* Multi chapter support – can be accomplished with access control and managing 1 single payment system and routing funds to each chapter. A [wish list item](https://forums.wildapricot.com/forums/308932-wishlist/suggestions/8826091-managing-multiple-groups-or-chapters-in-a-single-w) has been filed on this request.

**Website**

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| **Must Haves** |
| **Seamless sign on between Website and Member Profile/Database:**   * Must be able to **connect with the membership database** in order to have **password protected areas that are only accessible to members**   Supported through the integrated Wild Apricot [content management system.](https://gethelp.wildapricot.com/en/articles/532)  **Wild Apricot supports public and members only content as well as restriction for files. Each membership level can have their own set of pages. Lapsed or archived members will be restricted from login and encouraged to renew online.** |
| **Bilingual:**  French and English sites  **Wild Apricot is *not* bilingual, but NewPath Consulting has created the** [**Wild Apricot Text Manager (WATM)**](https://www.newpathconsulting.com/watm)**. WATM adds one alternative language that can be used throughout the system to translate all pages, system gadgets, and all system labels. The donation, online store, membership and event workflow systems are in a primary language (English by default) and translations can be added to all content to 1 alternative language with WATM. Translations are provided by the customer.** |
| **Log In:**  Once a member is logged in, make sure they know it (put their name on the site – i.e.:  Hi, John Doe or something similar)  **The** [**login**](https://gethelp.wildapricot.com/en/articles/418) **gadget can be integrated into a page template to identify logged in state.** |
| **Clean look** and **Consistency of fonts** and tables – ability to fix errors easily  **The CMS in Wild Apricot supports various responsive** [**themes**](https://gethelp.wildapricot.com/en/articles/25)**, the system has a user-friendly content editor that supports text, graphics as well as audio and video. The page template system enables consistent creation of new pages based on a pre-created design and layout.** |
| **Rotating Slider bar**: similar to what we have now.  **The** [**slideshow gadget**](https://gethelp.wildapricot.com/en/articles/423) **can be used to display a variety of graphics.** |
| **Quick Links section**:  staff need ability to prioritize and order as required  **Content can be created easily with hyperlinks. Secondary** [**navigation menu**](https://gethelp.wildapricot.com/en/articles/425) **gadgets can be used to present a set of links.** |
| **Custom Page Banners** (or headers):  Ability to add a custom banner to each section of the site (I.e.:  Symposium pages would all have Symposium banner, Registry pages would have registry banner etc.)  Staff should be able to create and add them.  [**Page template**](https://gethelp.wildapricot.com/en/articles/185) **functionality allows the creation of thematic sections. Page templates, when used appropriately, can enforce a standard design yet providing a unique look and feel for various public and member’s only sections of the website.** |
| **User-friendly** administration site, where staff can easily update/add/edit information with the following abilities:   * Enter multiple web-pages, with links to other pages or external sites * Ability to create and hide pages until needed and to make visible when required * Create new sections, and sub-pages, * Upload documents of varying file size *(over 10MB would be nice, but not critical)* that can be placed on the front end of the website. * The ability to add new folders to organize all of the documents (includes storing member’s magazines and chapter newsletters, photos, logos etc.) * Add and customize tables (width and heights, boarders, colors etc.) * View/add/ edit hyperlinks with ease   **The content management system allows a hierarchical approach to creating pages, blogs and sub pages as well as a dynamic** [**menu**](https://gethelp.wildapricot.com/en/articles/424) **system to organize all content. There is a** [**file manager**](https://gethelp.wildapricot.com/en/articles/177) **that can store and secure documents such as MS Office and PDF files. Pages can also be set to** [**admin-only mode, or restricted**](https://gethelp.wildapricot.com/en/articles/189) **to one or more membership levels or groups.**  [**Tables**](https://gethelp.wildapricot.com/en/articles/211) **can be edited as part of the content management system as well.**  There is a wide variety of content gadgets that can be placed on a page template or on a page to achieve a very rich website experience:  [**Blog gadget**](https://gethelp.wildapricot.com/en/articles/171-blog-gadget)  [**Breadcrumbs gadget**](https://gethelp.wildapricot.com/en/articles/426-breadcrumbs-gadget)  [**Cart gadget**](https://gethelp.wildapricot.com/en/articles/1573-cart-gadget)  [**Content gadget**](https://gethelp.wildapricot.com/en/articles/407-content-gadget)  [**Catalog gadget**](https://gethelp.wildapricot.com/en/articles/1569-catalog-gadget)  [**Custom HTML gadget**](https://gethelp.wildapricot.com/en/articles/408-custom-html-gadget)  [**Donation form gadget**](https://gethelp.wildapricot.com/en/articles/410-donation-form-gadget)  [**Donation goal gadget**](https://gethelp.wildapricot.com/en/articles/411-donation-goal-gadget)  [**Discussion forum gadget**](https://gethelp.wildapricot.com/en/articles/414-discussion-forum-gadget)  [**Event calendar gadget**](https://gethelp.wildapricot.com/en/articles/412-event-calendar-gadget)  [**Facebook comments gadget**](https://gethelp.wildapricot.com/en/articles/431-facebook-comments-gadget)  [**Facebook page gadget**](https://gethelp.wildapricot.com/en/articles/430-facebook-page-gadget)  [**Forum summary gadget**](https://gethelp.wildapricot.com/en/articles/415-forum-summary-gadget)  [**Forum updates gadget**](https://gethelp.wildapricot.com/en/articles/416-forum-updates-gadget)  [**Featured member gadget**](https://gethelp.wildapricot.com/en/articles/517-featured-member-gadget)  [**Google map gadget**](https://gethelp.wildapricot.com/en/articles/421-google-map-gadget)  [**Headline gadget**](https://gethelp.wildapricot.com/en/articles/409-headline-gadget)  [**Log in button gadget**](https://gethelp.wildapricot.com/en/articles/417-log-in-button-gadget)  [**Log in form gadget**](https://gethelp.wildapricot.com/en/articles/418-log-in-form-gadget)  [**Member directory gadget**](https://gethelp.wildapricot.com/en/articles/390-member-directory-gadget)  [**Menu gadget**](https://gethelp.wildapricot.com/en/articles/424-menu-gadget)  [**Navigation links gadget**](https://gethelp.wildapricot.com/en/articles/427-navigation-links-gadget)  [**Photo album gadget**](https://gethelp.wildapricot.com/en/articles/422-photo-album-gadget)  [**Recent blog posts gadget**](https://gethelp.wildapricot.com/en/articles/406-recent-blog-posts-gadget)  [**Secondary menu gadget**](https://gethelp.wildapricot.com/en/articles/425-secondary-menu-gadget)  [**Sharing buttons gadget**](https://gethelp.wildapricot.com/en/articles/432-sharing-buttons-gadget)  [**Sitemap gadget**](https://gethelp.wildapricot.com/en/articles/428-sitemap-gadget)  [**Site search gadget**](https://gethelp.wildapricot.com/en/articles/429-site-search-gadget)  [**Slideshow gadget**](https://gethelp.wildapricot.com/en/articles/423-slideshow-gadget)  [**Social profile gadget**](https://gethelp.wildapricot.com/en/articles/433-social-profile-gadget)  [**Subscription form gadget**](https://gethelp.wildapricot.com/en/articles/420-subscription-form-gadget)  [**Upcoming events gadget**](https://gethelp.wildapricot.com/en/articles/413-upcoming-events-gadget)  [**Membership application gadget**](https://gethelp.wildapricot.com/en/articles/419-membership-application-gadget) |
| **Job-postings**: Members should have the ability to create job-postings by logging into their profile.  They should display and rotate on the home page of the site or be accessible by a click  Job postings should have a start/end date and automatically be removed from view after the end date  Non-Members should have the ability to pay a fee in order to post a job.  **Job postings are *not* available in Wild Apricot. One could setup a member’s only** [**blog**](https://gethelp.wildapricot.com/en/articles/171) **to simulate the idea of chronological postings. These can be searched, but do not expire unless manually removed. Alternatively the** [**forum gadget**](https://gethelp.wildapricot.com/en/articles/414) **could be used for job postings and discussion.**  **Third party job systems could be integrated into the site for an added fee.** |
| **Events**: Only administrators can add events, but there should be an event calendar on the front end of the website, which shows multiple events.  (nice to be able to sort which are and which are external events, by color or a separate section  **The extensive** [**event management**](https://gethelp.wildapricot.com/en/categories/23-getting-started-with-events) **system supports various categories of events as well as online registration and management of multiple registration types.** [**Color coding**](https://gethelp.wildapricot.com/en/articles/94#color) **based on event tags is easily accomplished.** |
| **Newsfeed**:  Ability to post stories that appear on a news feed and rotate in and out (or allow for multiple news stories to show at once)rotate news in and out is not available.  **News stories can be posted on the home page or any page of the website using the** [**recent blog posts gadget**](https://gethelp.wildapricot.com/en/articles/406)**. Content for news and announcement is managed using the** [**blog**](https://gethelp.wildapricot.com/en/articles/171-blog-gadget) **gadget.** |
| **Annual maintenance and automatic updates**  **Updates to Wild Apricot are done at least 4-6 times per year. Version 6.0 recently shipped. The** [**full history**](https://gethelp.wildapricot.com/en/categories/139-browser-application-release-notes) **of all versions are published online.** |
| Places for **Banner Ads** to recognize sponsors or advertise Events or programs  **Banner ads can be placed as a content gadget, but there is no ad management system in Wild Apricot. An external ad rotation and tracking system can be implemented.** |
| **Member Forum:**  This should be a button that members can easily access when logged into the site.  The forum would be group into Categories, then topics and then the various discussions.  Members can follow or unfollow categories/topics and discussions  Emails to be sent to the member if they are following a particular category, topic or discussion  Members can post multiple graphics as part of the discussion  Ability to create groups so that certain groups can be invited to certain topics (i.e Board Members, Committee Members etc)  Members can easily return to the website after being in the member forum  **Member discussion forums are supported using the** [**discussion forum gadget**](https://gethelp.wildapricot.com/en/articles/414)**.** |
| **Member Directory:** Access to it should be prominent on the home page.  Members can choose what information is displayed (Company, Address, Phone, Email)  Organizations can be sorted by categories, and the 2 representatives are listed under the organization.  Members can be searched by company, province, certification title  Members can easily return to the website after being in the directory  **One or more** [**member directories**](https://gethelp.wildapricot.com/en/articles/390) **can be added and maintained with access control and advanced search capability. Member directories of various levels and capabilities can be placed throughout the website.** |
| **Mobile Friendly:**  Users should be able to view from a mobile device/phone or tablet.  **All themes are** [**mobile responsive**](https://gethelp.wildapricot.com/en/articles/94)**.** |
| **Security/Backup:** Ensure there is a backup to avoid lost data/pages.  Assurance that non-members will not be able to access member only content.  **The Wild Apricot system is hosted on Amazon Web Services as top-tier cloud compute platform.** [**Version history**](https://gethelp.wildapricot.com/en/articles/516) **of pages is accessible by administrators.** |
| **Accessible:** To provide some level of accessibility as per the Web Content Accessibility Guidelines, working towards the ability to provide WCAG2.0, Level A in the future…. At minimum the ability for font re-sizing.   **Font resizing gadget can be installed, but is not available out of the box.** |
| **Admin Training:**  At least 1 in person staff training session, plus a written user manual.  **The** [**Wild Apricot documentation**](https://gethelp.wildapricot.com/en/articles/516) **is excellent and well maintained. NewPath Consulting provides direct training via web conference and in written form.** |

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| **Nice to Have, but not critical** |
| **Stay Logged in:**  The ability to log in and an option to stay logged in (remember my password) when the member re-visits the site  **This is supported.** |
| **Reporting**:  Ability to view usage/traffic statistics on a monthly or quarterly basis  **We will install Google Analytics, which is fully supported.** |
| **French/English Translation**:  Would be nice if we could populate the French and English sides of the site in one place (or have English as a place-holder until the French translation is available to us)  **This is currently unsupported in the content management system.** |
| **Photo Gallery**:  Ability to upload event photos for members only to view or download.  [**Photo gallery**](https://gethelp.wildapricot.com/en/articles/422) **and** [**slideshow gadgets**](https://gethelp.wildapricot.com/en/articles/516) **are supported.** |
| **Document Sharing**: Ability to add documents in the Resources area for members only.  Could be how to pages, or Symposium presentations.  Staff only would be responsible for adding  **This is supported using links to files uploaded using the** [**File Manager**](https://gethelp.wildapricot.com/en/articles/177)**. Access control can be applied to one or more files using the membership levels.** |
| **Chapter Pages or Sites:** Each chapter to have the ability to create their own sub-website within the main site (i.e.:  -acsal.org/pacificchapter) - This would mean multiple admin user permission levels.  **This is possible using the administrative access control which can** [**limit access**](https://gethelp.wildapricot.com/en/articles/50#features) **to a set of one or more pages.** |
| **Internal search engine:**  users can type in key words to help them find what they are looking for on the  **A search engine is available using the** [**site search gadget.**](https://gethelp.wildapricot.com/en/articles/429) |

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| **Ultimate Dream Items (things to aspire to!)** |
| **Forms:**  Ability for staff to create custom forms that could be used for abstracts/awards/surveys or whatever we dream up in the future)  **This is possible using the Formstack.com system separately available outside of Wild Apricot. NewPath Consulting has a lot of experience with this system.** |
| **Print Friendly:** For pages (especially Symposium program and Registry information) to be printable and look good when printed  **The theme supports** [**print friendly**](https://gethelp.wildapricot.com/en/articles/117) **output.** |
| **Searchable Library:**  The ability to list each article from the members magazine and have it contained in a library where members could search for topics based on key words  **This can be accomplished using the** [**site search gadget**](https://gethelp.wildapricot.com/en/articles/429) **but a separate magazine only Wild Apricot site must be setup. The site search gadget searches all content on one Wild Apricot website.** |
| **Cool Symposium Program Design:**  The program can be big and we tend to create multiple pages – it would be nice to have a creative and different way to display the program!  **This may be possible using an inventive use of page templates.** |