Response to Proposed changes for ISFG website (28.09.2012)
==Status Nov. 14, 2012)==

My notes are in green and my wishes/questions/concerns are in red.

1. Separate checkbox for user record for
   a. Honorary members (these do not have to pay any membership fees, so no payments should be added in the accounting list)
   b. Corporate members (these need to pay 600 Euros, but will not so that by credit card, they have to receive a personalized invoice – so the payment should be added manually when the payment has been made).

Included those fields in the User module both as a filter and as attributes of each user. Please check whenever my initial assignments are correct.


Looks fine to me (pms)!

Create more email lists to ask members to pay their fees, including a filter system (or a dynamic list based on payment records) to send separate mails to
- c. Members who have to pay for the current year only.
- d. Members who have to pay for 2 years
- e. Members who have to pay for 3 years (and risk loosing their membership)
- f. For this, it is necessary to take into account the admittance date into the society.

I created a new module "Tools" where I'll collect useful helpers and queries to the system. They should be self-explanatory.
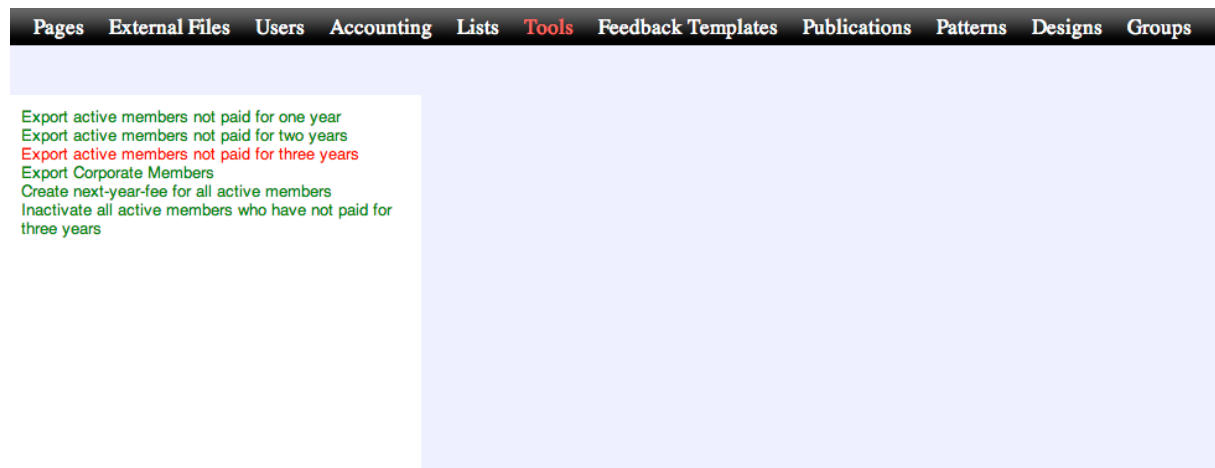
The exported lists have all emails and should be a convenient source to send emails.

The "not paid for one year list" includes also the members not paid for 2 and 3 years, and the 2-year list those who have not paid for 3 years. This is not convenient if specific emails need to be sent, as the lists have to be filtered again to distinguish between the three groups. Done.

Also, it might sometimes be helpful to know the country where the persons are coming from, so please include this information in the exported list. (pms) Done.

g. The admittance date should also be included for each member in the exported payment list that can be generated from the accounting page.

Done.

Looks fine to me – is there an explanation why 2013 is already in the exported list, but not in the accounting page?

The accounting page does only reflect the current payments (only shows 2013 if there's an 2013 payment) and the exported list will always have a next-year-column.

2. Is it possible to send the login name and a special password which can be used only for paying the membership fees? It should be sent out together with the reminder email. This would save a lot of time of helping people to obtain a new password (which they routinely forget!)

I added a link to the "Action" section within the User module to easily send a newly generated password to the user. Makes only sense if there's an email.
Yes, but that's a minor problem with > 90% valid emails! -- I assume that our idea of sending the login name AND the password together in the same email with a personal reminder to pay the annual fee is too complicated. However, we have the problem that some members forget their login name, as they only use the website once a year for paying their fee. And without login name, you cannot request a new password, or sign in.

I modified the complete authentication process (login pages etc.) to use either login OR email (case insensitive). I hope that's more convenient.

Actions

Re-sent validation email

Re-sent application email (Note: Will send this users application request to the secretary(-ies).)

Sent a newly generated password to the user.

- The membership fee of 2012 (60.00 Euro, paiable until 01. Jan 2013) was not paid yet.

3. Is it possible to add a separate column (similar to News list) on the left side of the screen (only on main start page) for meeting announcements?

Yes, done that. The content will be served from the "Announcements" page.
Fine, I have found and used it already. Can it be renamed to "Conferences"?
Done.

4. Is it possible to configure the bank payment website so that the default language is English? The small box "Sprache: deutsch" is not recognized by many users.

Done. Default language is set to English. -- Fine!

Added at Innsbruck board meeting Sept. 2012:

5. Website should send automatic message to pay the membership fee to all members at the end of November (for next year) – text to be proposed by Leonor/Peter.
   Then: a second automatic message should be sent to all who have not paid at the end of January!

Please send me those template texts.

The following messages do not contain any personalized information (username, password) as discussed previously:

Message 1 (end of November):

"Dear ISFG member,

the annual membership fee of EUR 60.00 for the coming year has to be paid until the end of January. Please go to your personal page on the ISFG website and use the credit card payment link. This link connects to a secure bank website, and you will receive by e-mail a PDF document with a receipt of your payment. Please sign in here:

http://www.isfg.org/Login

If you have lost your password, you can recover it here:

http://www.isfg.org/Password+recovery

For all other questions, please use the contact form:

http://www.isfg.org/Contact

With kind regards,

Dr. L. Gusmao
(Treasurer)"

Message 2 (beginning of February):

"Dear ISFG member,

last November, we have asked you to pay your annual membership
fee of EUR 60.00 for this year until the end of January.
Unfortunately, we have not yet received your payment.

Therefore, we kindly ask you to go to your personal page on
the ISFG website and use the credit card payment link. This
link connects to a secure bank website, and you will receive
by e-mail a PDF document with a receipt of your payment.
Please sign in here:

http://www.isfg.org/Login

If you have lost your password, you can recover it here:

http://www.isfg.org/Password+recovery

For all other questions, please use the contact form:

http://www.isfg.org/Contact

With kind regards,

Dr. L. Gusmao
(Treasurer)"

It needs to be clarified how these messages are triggered – or is it by calendar date?

6. Personal profile page: list the payments made by each member on his/her page, and allow
    to print a separate receipt for each of the years already paid for.

Should we really sign antedated (not yet existing) receipts? Otherwise (if already generated by
the system during the payment process) we are showing them in the way you describe it.

I am not sure what you mean with antedated receipts. I only mean a list of the receipts of real
payments which have already been made in the past, and have been generated by the system.

OK… now I understood. Done that.

7. Some ISFG members pay the fee already for next year, e.g. for 2013 in 2012. Then a payment is introduced manually by Leonor. At the end of the year, when the new payments for 2013 are added automatically, these persons would again see an open payment for 2013 on their pages. Is there a way to avoid that?

Please use the Link-button "Create next-year-fee for all active members" at the "Tools" module. There won't be duplicate fees created.

Great, Leonor should test the button when it is time to do it ☺