**MyAFEA Version 4 Update Specs.**

The purpose of this upgrade is to create a better website with a more up to date user friendly interface. Both the front end and back end using HTML 5 and Parallax web design. The new website must be cross platform compatible with Mobile & Tablets as well as compatible with the most recent and popular web browsers. Sudhir has done a great job with the page designs. I want to use most of them but have a couple of small changes that I outline below.

Myafea.org is comprised of five user interfaces:

1. Front End – General visitor Interface
2. Back End Admin Panel – Administrative access
3. Student Membership – Student Learning Portal
4. Chapter President Membership – Chapter Page Management and Student Connection
5. Employer/Organization Membership – Co-branded employee/member learning Portal

It is our intention to update all 5 interfaces in this Version 4 upgrade. The desired completion of this project is 7/1/2014.

The ultimate goal of AFEA is to become the Best Source for financial education. We would like to create a website that provides an organized learning experience for our users.

The Following will describe the changes we would like to make to each user interface:

1. Front End
2. Admin Panel
3. Student/General Membership
4. Chapter President Membership
5. Employer/Organization Membership
6. New trainee sign up – notify admin
7. Admin Trainee view – display trainees assigned by Chapter in admin panel
8. Trainees need to be assigned by Chapter instead of assigned to the coach. Assign existing Coach ID’s to the Chapter that the coach is assigned to. Only create New Coach ID’s for New Chapters and Assign that ID permanently to that Chapter.
9. Stop Free Sign Up – Use a lead capture form for people who are interested in joining as a Coach or Employer. Send notification to the admin when a new person signs up. Keep list in the admin panel with an exportable report
10. Give admin the ability to add outgoing auto emails to the existing trainees and coaches
11. Capture all emails from all registrations and trainee sign ups into one exportable report. Add opt out boxes when people register for upcoming classes (Default=Yes)
12. “Yes I would like to be notified of future upcoming classes” and
13. “Yes, please add me to your e-newsletter to keep me informed of the great things AFEA is doing in my community!”
14. Chapter Management Page – Organize files so that everything pertaining to a particular workshop can be found in one place. Ex: Each seminar topic has its own folder (Use the picture of the workbook with a button to open it) inside the folder is everything the chapter president needs to conduct that particular workshop
15. Registration Form – Allow a space to ask if spouse will be attending. If box is selected then additional fields will display to allow them to enter their spouses name. Export Report should show that the spouse is connected to the original registrant.
    1. Bring A Friend - Allow another space to add friends – if they will be bringing an additional friend they check the box and additional fields will display for more names to be entered
16. Online Registrations – notify admin via email when a person registers online
17. Upcoming Events Template Form – After state add “zip code” in the required input fields
18. Discount Program – Delete. We no longer plan to offer the discount program
19. Change Join AFEA message on Chapter Pages
20. Social Media – Automatically post upcoming events to our social media (Twitter/Facebook)
21. Remove Blog & Forum from website. We no longer wish to offer or use these functions
22. What We Provide – Remove Eliminate Debt page and change to “Scholarships” – I will provide the copy.
23. Featured Chapter Sponsors – We need to add a place for featured chapter sponsors on our home page. Give admin the ability to select featured when adding new sponsors
24. Donations Year to date– On the home page show a graph that grows when displayed that shows our Donations Received Year to date- This information will be automatically populated from all donations from received from all chapters
    1. Admin needs a way to manually input donation amounts in the admin panel for people who write us checks and don not go through paypal
25. Limited Access to certain Coaches – admin needs the ability to limit access to certain coaches that we sign up. This is for coaches who are on a trial period. We would want to limit the access to certain Seminar Folders. So when the admin creates a new Coaches profile they can select which seminar folders the coach has access too. The default is ALL.
26. Tuition Rewards – show another graph on home page that shows the amount of tuition dollars we have given away year to date. Admin can input this information in the admin panel – use strayer.edu home page graphs as a model for ours. I like the way they populate when they are displayed.
27. Student/General Membership Dashboard – Organize the dashboard so that the training videos are the main focus and that they are divided into categories with the Chapter Directors face next to each category with a message and a contact me button. If the user clicks on the category it will expand and show the videos pertaining to that category. Here are the categories:
    1. Financial & Retirement Planning- Assign Chapter President
    2. Real Estate & Real Estate Investing – Assign Real Estate Agent
    3. Wills, Living Wills & Trusts – Assign Elder Law Attorney
    4. Mortgages – Assign Mortgage Broker
    5. Home/Auto/Business – Assign P&C Broker
    6. Major Medical Coverage – Health Insurance Specialist
    7. Taxes – Assign CPA/Accountant
28. Provide a way for the user to contact their coach after watching a video
29. Allow other documents to be “unlocked” after a video is watched
30. Allow ability for admin to charge for certain videos via paypal. Using the fpage layout that Sudhir created and Assign a picture and a trainer to certain videos that have a fee.
31. About Us page – add place for admin to add a video
32. Chapter Pages
    1. Use the parallax scrolling technology on the Chapter Page
    2. Allow admin to add a background picture on top of page
    3. Allow admin to add a video on the chapter page of the Chapter President welcoming people to their chapter and asking them to join. If no video is uploaded do not display. Just show a picture of the Chapter president
    4. Show the calendar of upcoming events on the page
    5. Allow people to join the chapter on the page
    6. Allow people to register for upcoming classes on the page
    7. Display the chapters upcoming classes on the page
    8. Allow people to sign up for the Chapter Directors
    9. Display Chapter Directors – Like Sudhir Created with their pictures and a read more button. But make it more prominent
    10. Support our cause – allow people to donate to our chose school or chapter show picture of school and the thermometer of donations here
    11. Show some featured articles at the bottom of the page and archived articles similar to home page
    12. I want the Chapter Pages to Look Like their Own Website – so do not use the Home Page Navigation. Just have the AFEA logo at the top so that they can return to the main website
33. Get rid of Place We Have Been on the home page. Replace with Testimonials
    1. Allow admin to add videos and text from testimonials we receive
34. Use a contact Coach button rather than displaying the coaches email address on his chapter page
35. Change all Trainees to be assigned to the Chapters not the Coach. Admin needs to be able to view trainees per chapter and reassign a coach as needed without having to move all of the trainees.
36. Upcoming Class Registration – Allow admin to enter a regular price and then an early registration price. Admin will need to be able to enter a date from which the system will know to switch from the low rate to the high rate and send that value to PayPal
37. Need a way to assign an Academic Coordinator (Admin) to each chapter with access to the chapter information
38. After Each Class we need a way for the Class registration list to populate with a check off of attendees. This will be a mandatory form that must be completed after each workshop. Without completing this form and submitting it to the assign Academic Coordinator the account will be frozen until it is submitted. I will provide the format for this form.
39. Add a “You’re Ready For AFEA” at the bottom of the home page like Strayer.edu to allow people to enter their information and join
40. Change Chapter Board of Directors to just Chapter Directors
41. Automatic welcome email from the Chapter President to each new trainee that joins the chapter
42. Admin needs a way to set up recurring emails in the admin panel to go out to coaches and or trainees
43. Add featured training video on the home page – admin can select one training video that will be featured on the home page. This video will also be featured on our social media platforms (Twitter & Facebook)
44. Schedule a Workshop – need to change the copy to also include request a speaker with instructions on how to do it.
45. Redo and Upgrade Admin Panel – Get rid of the things we do not need. Change the look to match the new front end of the website. Make it more user friendly and organized so that our employees can use it easier.
    1. Improve the functionality – You will need to meet with our Academic Coordinators to get an idea of what they need to make their jobs more efficient
46. Improve the reports and their formatting
    1. Get rid of reporting that does not work or is misspelled etc.
47. Employer/Church/Organization Registration & User Experience- I want this section of user experience to be co-branded with the employers logo and powered by AFEA. I want it to be an educational portal where they have the ability to upload their employees or members information either via spreadsheet or manually one by one. Or the employees have the ability to join the under them somehow. So it would be like creating a Chapter Page but it would be for the Employer’s company or the Church
    1. The Employer’s page will be assigned to a Chapter Page
       1. Ex: ABC company joins in Charlotte, NC. ABC company has its own ABC page but is addigned to Charlotte, NC Chapter. So Charlotte NC Chpater President is their coach and the Charlotte, NC Chapter Directors are also assigned to ABC company. When a employee signs in under ABC companies portal they will see a co-branded dashboard with ABC company’s logo powered by AFEA. They can watch videos in the already designated categories and will also see training & Messages uploaded by ABC company.
    2. The employer would have the same ability as a Chapter president to manage training. Add new training events specific only to their Employees or members
    3. They can add videos
    4. They can add special Messages from the Pastor or from The Employer
    5. ABC company has the ability to add/remove employees.
    6. ABC company can close the account at any time
    7. ABC company can make certain training videos mandatory
48. One Year Aniiversary Emails – Automatic emails will be sent to all members on their annual anniversary dates
49. Display Order for Articles – allow admin to assign the order which articles are displayed
50. Request A Coach – on What We Provide add a fprm on the page about Personal Financial Coaches that allows people to request a coach. Gather their Name, phone, email, and brief description of why they need the coach. Best time to reach them AM or PM? – send results to admin
51. Email Access on Dashboard- Our Coaches would like to have the ability to access their myafea.org email from some type of email client on their personal dashboard.