

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56

Rotary
Rotary Oceania



Project ONE
Being One/Based on One
A project operated by ROZops Limited

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A Simple Membership

DASHBOARD

Project Overview

This project is about answering how a Club 'life' app, can be made available to Clubs in the new Flectra system.

Clubs that have seen other Club apps that have simple **DASHBOARDS** (such as golf Clubs etc.) are asking for a **DASHBOARD** app to be made available.

From feedback essentially the requirements are:

1. A **DASHBOARD** VIEW – My ... (Club news, causes (donations and volunteering), fees, event tickets, tasks...)
2. Meeting duties
3. Communications with others
4. Reminders by txt message!

The project to do that has been scoped and costed.

Subject to funding, the timetable for release of the first version is for February 2023.

The next section has a preliminary concept for design and development.

Team Member **DASHBOARD**
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 Project Start Date 8 December 2022
 Revision Number 56

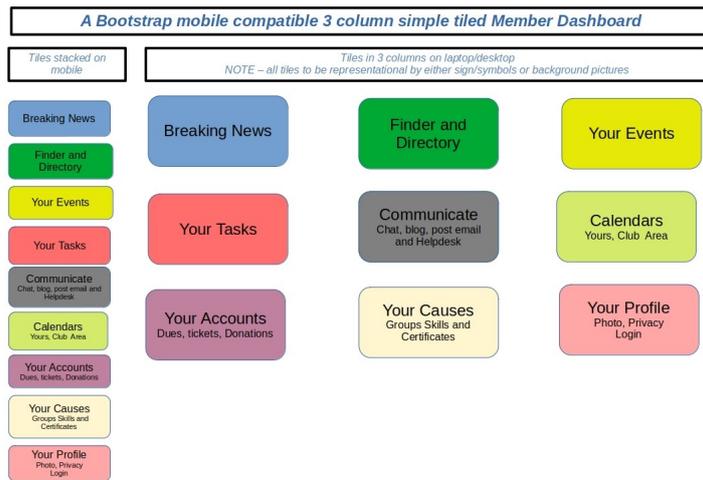


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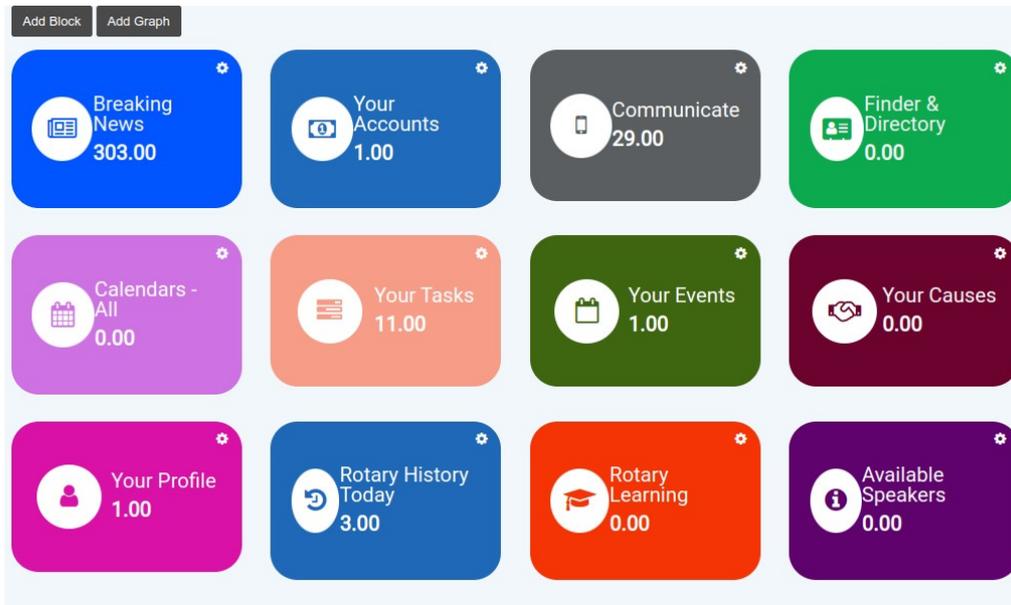
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DASHBOARD CONCEPT



And this is a rendering of a design concept in the Flectra platform completed in December/early January:



Note : this is for the team to complete a series of design reviews and does not have all the extra logic behind the tiles to deliver all the data expected from each tile.

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56



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As this project is part of ProjectOne and relies on the Flectra infrastructure the next section provides a short version of the larger project which has now been underway for over 3 years and is now being deployed to Clubs on an opt-in basis.

ProjectOne

The ProjectOne vision is that tools must deliver for members and officers.

As Clubs are onboarding, those Clubs are:

- refreshing their web sites using brand new templates – for an example click here to see rotaryhowick.club
- replacing many different services with the Flectra platform which already has advanced event management built in, tested and ready to go
- revolutionizing backoffice accounting with the inbuilt membership billing
- and more (if your Club wants to be in the queue for onboarding how to is set out on the Helpdesk Link)

How the **DASHBOARD** fits in to that vision, is to provide an app that can make organising Club life (meetings, projects and tasks) easier and in one place for most members.

At the same time the **DASHBOARD** needs to be connected to the other computer based services.

Those include the heavy lifting required for payments and webpages etc.

That is already setup in the Flectra Enterprise system, which Clubs are now getting established on by 'onboarding'.(if you want to consider onboarding please file a Helpdesk ticket at

erp.rotaryoceania.zone/helpdesk-form

The **DASHBOARD** will provide a simple day-to-day member experience without having to learn the Flectra back-office system.

That is captured in the project **vision**

“Being One, Based on One”

ROZops is implementing that vision through a **mission** statement has been captured in this 'picture' view.

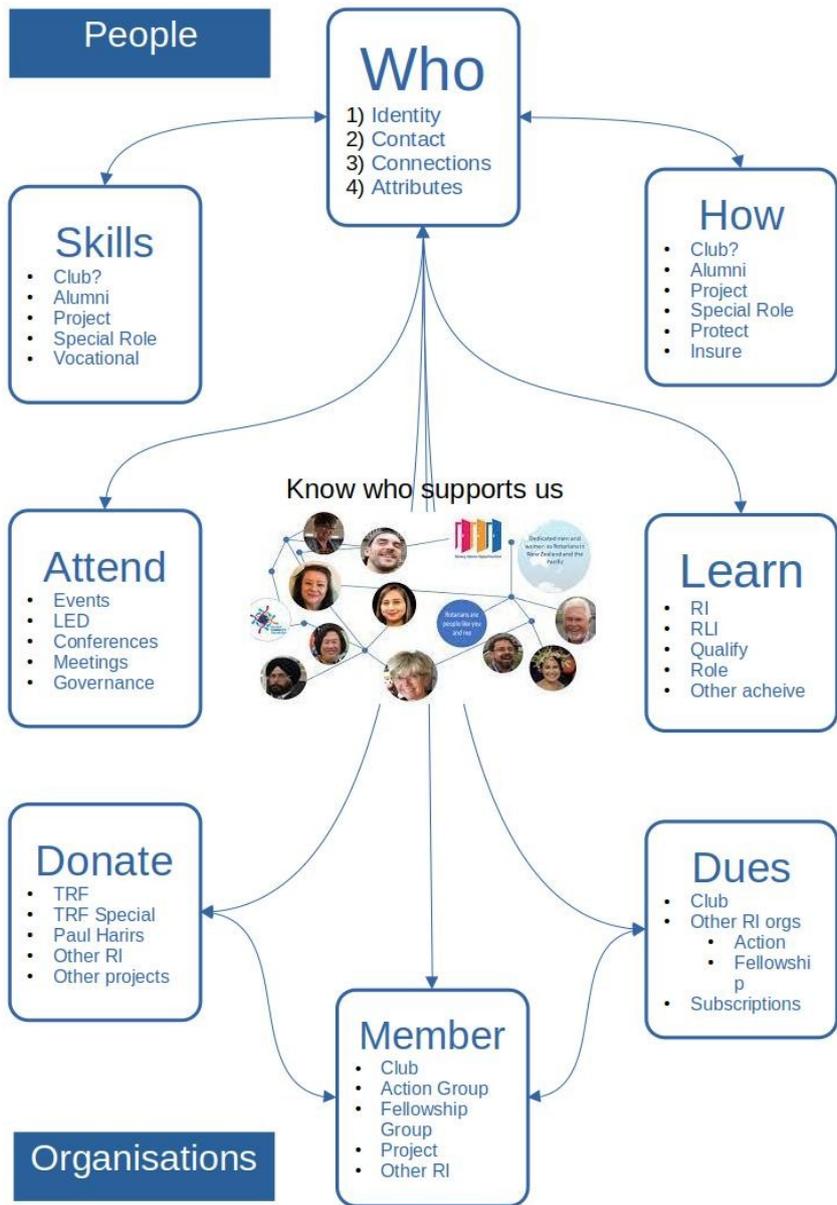
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 Team
 Platform Electra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56

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The **mission** is to deliver the back office system to members in a single **DASHBOARD** application which avoids members having to learn the back office system.

Also services have to deliver to:

- *members*
- *prospective members*
- *former members*
- *volunteers*
- *sponsors*
- *suppliers*
- *other Rotary organisations,*
- *Rotary officers*
- *and more*

Moreover, those services are required by:

- *many programmes (e.g. youth programs or community programmes) and*
- *the entities that are involved including Clubs, Trusts, Rotary companies and organisations, Suppliers and more.*

Flectra and its associated services are designed to make it easier to sustain public image, have easier accounting and administration. It is a big system with over 160 modules.

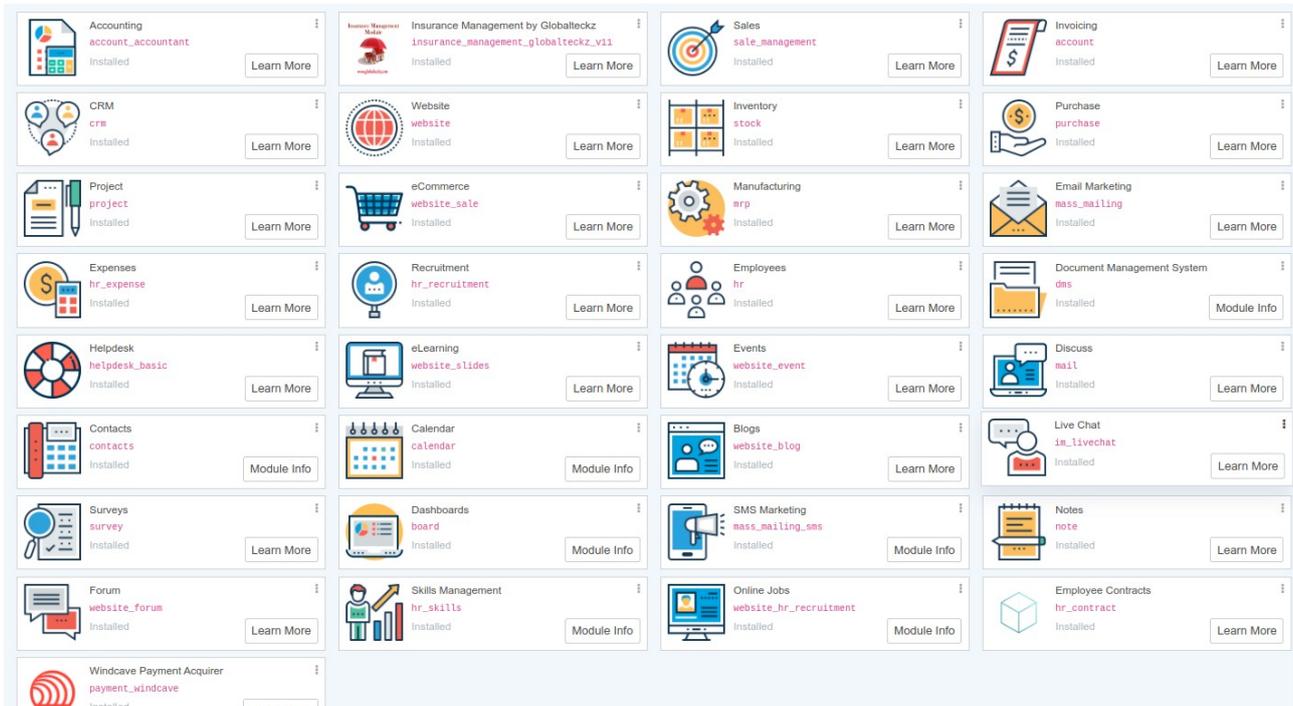
Team Member **DASHBOARD**
 Team
 Platform Flectra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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Day-to-day for members and Clubs

Club life is on the go.

Today that means a “mobile first” strategy – that is presenting information on a mobile phone.

Given the size of mobile screens and the need to navigate on small touch screens the phone view needs a simple focus on the key Club and member experiences.

The back office can deal with all the nitty-gritty of membership, security, status and roles, dues owed, event tickets purchased, donations etc.

Those are big complex bulk tasks and are mostly already configured in Flectra..

Clubs have been helped by use of a wide range of apps like Facebook and its Messenger service, WhatsApp, Telegram, newsletters, bulletins, Twitter and online meetings apps such as Zoom Google Meet, Skype

The Rotary Cub of Whakatu however has provided us an example for our project. That Club decided that it would simplify the key communication functions of those many apps into a Club real-time app that enabled Club life, whether meetings or projects, to be in a secure, single environment.

Team Member **DASHBOARD**
Team
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Project Start Date 8 December 2022
Revision Number 56

Rotary
Rotary Oceania



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This was made possible by the work of a member, Sean Thomas, who sadly died last year, but left the Club his legacy of an app that has made a huge difference to that Clubs working and fellowship.

*Due to the altruism of both the late Sean Thomas and the Rotary Club of Whakatu we have had the privilege of being able inspect the source code of the RC Whakatu app. After code review was completed (which took over 40 developer hours) the ROZops ICT team discussed development with the current President of the Rotary club of Whakatu. It was his recommendation that we focus on developing the **DASHBOARD** in Flectra. We agree.*

What is the advantage of extending the Flectra system?

It is simple, the data and back-office functions are already there. The system is multi-organisation (Clubs, Districts, MDIOs, Trusts, Rotary Companies, RI Action and Fellowship Group Local Chapters ...) and each organisation can have their own website.

Most important Rotary owns the server.

The **DASHBOARD** is directed to making Club life easier to organise and sustain.

As Rotary research shows:

People join Rotary to change their own lives

but only stay, if their lives are changed.

The secret to changing lives by joining Rotary

is fellowship and project service.

Ask yourself, in your interaction with your Club how are fellowship and service promoted? By bulletins? By Facebook? By a plethora of different services with different updates. Logins

The **DASHBOARD** app will provide a real-time approach that:

1. enables Club members to organise in one place – **the DASHBOARD**
2. to communicate about Club meetings and project service in one place – **the DASHBOARD**
3. to sort out catering and speakers – in **the DASHBOARD**.

As noted above, Flectra can do the heavy lifting with accounting, projects that require tasking, recording confidential information, pipe lining campaigns, mass email or SMS txt'ing

Working together the **DASHBOARD** app in Flectra and the Flectra main Background system, we can present action based capabilities that start with being a member and using the **DASHBOARD** app

If a member needs to do more and those tasks require configuring and setup then those member users can have extra permissions and training. Examples are those that need to have access to website

Team Member **DASHBOARD**
Team
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Project Start Date 8 December 2022
Revision Number 56

Rotary
Rotary Oceania



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development, mass email mass txt'ing, event management, project management, billing, donations for our causes on devices such as laptops through Flectra.

What is the proposal to enable development?

ROZops already has the capability to do the work but will need to 'crowd fund' the development.

Fortunately, ROZops did not need to raise all the money up-front so it work could start on the PROOF OF Concept PHASE IN early December. With PROOF OF CONCEPT completed the development crowd funding is now underway..

How can your Club or Rotary organisation help?

Volunteering on the **DASHBOARD** team:

We need:

- users to be END USER testers
- any developer or IT skills (especially in Python, SQL, html)
- any graphics skills
- experienced in identity security
- IT project admins and GIT maintainers
- any SEO consultants
- ATTEND an information session on Zoom to ask your questions. The first of these presentations to explore the **new modern website template** is an open information session on [Zoom on Wednesday the 25th of January at 10:30am – click here for the link.](#)

Crowd funders

You or your Club or associated trust, can donate to this project.

The project forecasts are for a cash budget of around \$ 30,000 and contributions up to \$45,000 will be accepted.

On the fund reaching \$45,000 a 'requirement review will trigger a survey and online meeting.

If further requirements are voted on by users a further business case will be developed. ([If you have not seen the original business case documents for ProjectOne and would like to read those documents the documents can be downloaded from here](#))

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56

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Rotary Oceania

 **Project ONE**
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The work programme will be overseen by ROZops and will be:

1. to provide a Single Sign-On option to enable Clubs to set up the **DASHBOARD** by connecting to our existing identity server as already implemented with Flectra
2. that will then enable the current permissions/role structure in the **DASHBOARD** to be maintained and separate Club databases to be established
3. Clubs can then setup the **DASHBOARD** for their members while integration with the Flectra capabilities are developed so that meetings can be integrated with Flectra's billing and payment capabilities
4. Design will initially be to get the **DASHBOARD** working with graphics to be in version 2 once the functions are settled and working and we have user feedback.

All donors will be recognised, as the project is open source is tax deductible.

This project fund will help us provide the capabilities the **DASHBOARD** have used to revolutionise Clubs.

On completion the **DASHBOARD** will be made available for free to all subscribing Rotary Clubs programmes, whether Rotary, Rotaract, Interact or Rota Kids.

To get started your Club, Club trust or a benefactor can donate

Any donation of \$20:00 or more can be made online by clicking this link.

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Donors that provide major donations become:

- A Silver donor contribution of \$1000 or more
- A Gold donor contribution \$5000, which can be made in one donation or instalments.
- A Platinum donor contribution \$10000, which can be made in one donation or instalments.

Donor will be permanently recorded in a Roll of Honour in an About page for the **DASHBOARD**. Silver will be listed, Gold will be on a half page image, Platinum will be on a full-page

The **DASHBOARD** will be submitted for open source awards and, if any awards has a public recognition event, donors will be advised and asked how they wish to be recognised and if desired participate.

Donating

If you can donate please either use the donation link in the header on each page or send an email to:

operations-manager@rotaryoceania.zone

Team Member **DASHBOARD**
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Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56



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with the subject line “Subscription for the **DASHBOARD** app project”

or file a Helpdesk ticket on Flectra using:

erp.rotaryoceania.zone/helpdesk-form

with any issue type selected.

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 Team
 Platform Flectra ERP
 Project Start Date 8 December 2022
 Revision Number 56



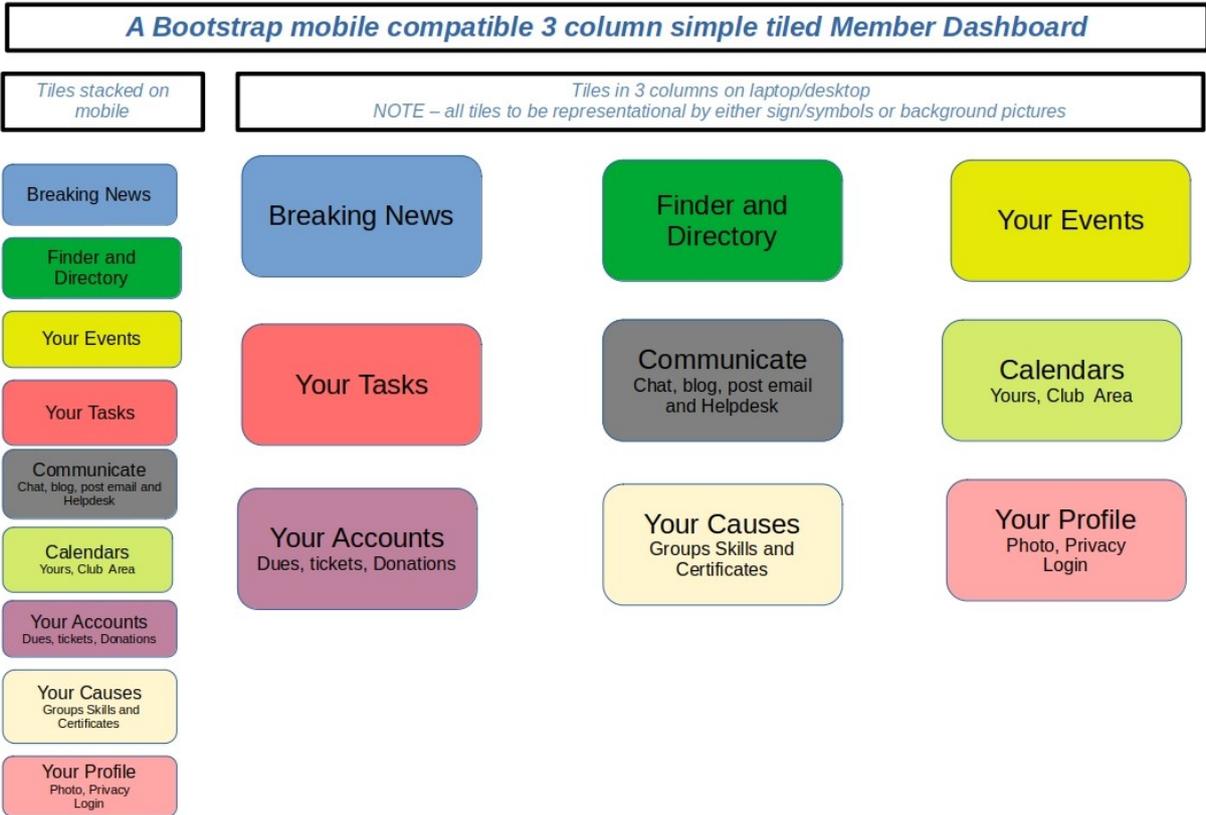
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APPENDIX 1

The proposed **DASHBOARD** App



Current Development Status

An existing module written by the Odoo/Flectra open source community provided a starting point has been upgraded and installed.

The code had to be checked and some bugs identified fixed and installed on our test (STAGING) server to enable the PROOF OF CONCEPT development to be done. That was done over Xmas/New Year.

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56



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Having completed PROOF OF CONCEPT the code provided a foundation to enable some real PROTOTYPING.

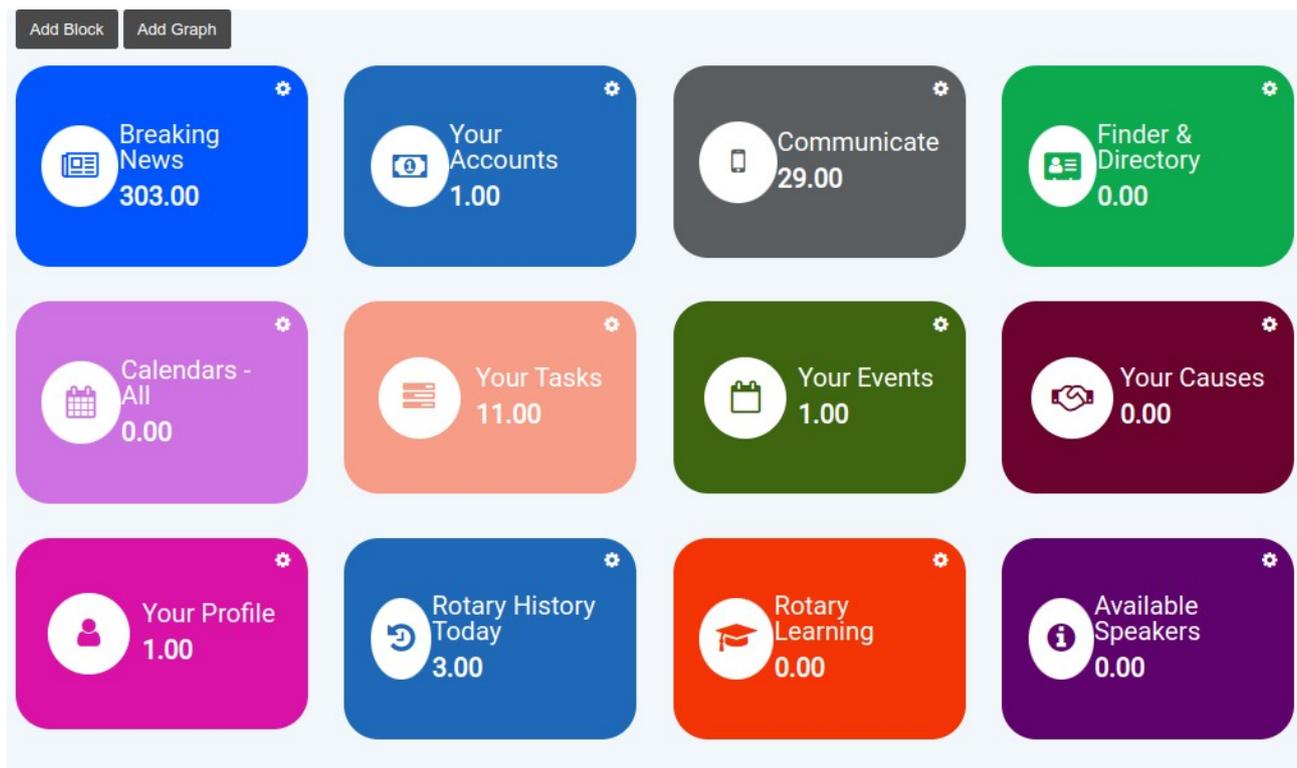
The screenshot on the next page shows the prototype which is ready for the first DESIGN REVIEW

We are calling on any member that is interested in this prototype to register their interest so that they can be invited to the upcoming first DESIGN REVIEW meeting.

The first DESIGN REVIEW meeting will consider the attending members suggestions on the design principles and how to achieve the design Principles.

As noted above, this work below, has already commenced.

The screenshot is from the PROTOTYPE on the live STAGING server.



You will note there a 12 tiles featured in the PROTOTYPE as against the 9 on the proposed **DASHBOARD**.

The additional 3 tiles ROTARY HISTORY TODAY, ROTARY LEARNING and AVAILABLE SPEAKERS are to illustrate the possibilities of the **DASHBOARD**.

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56

Rotary
Rotary Oceania



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ROTARY HISTORY TODAY might be seen as helping members to understand and feel proud as a member of our achievements. There are several ways we could get the data to support such a function including drawing from Rotary Global History Fellowship website.

Similarly with Learning and Speakers we could draw courses from the Rotary Leadership Institute, the Oceania Learning and Development team and/or Rotary's Learning Center catalogue and for Speakers we could set up that from the Flectra Events module.

Design Principles

There are many books and toolkits for mobile **DASHBOARD** design.

The design principles are often expressed in different words but summarised the common principles are similar.

Here is an example design principles statement from a toolbox vendor:

A great design is one that:

Makes the complex simple: *we have lots of information, lots of data that changes all the time and different analytical needs and questions. We want to take all this complexity and make it simple.*

Tells a clear story: *we want to be able to connect data to its context in the business and to answer the viewer's questions. This is where the visual layout of a dashboard plays a crucial role.*

Expresses the meaning of the data: *the chosen data visualizations need to correctly represent the data and the information you want to extract from it.*

Reveals details as needed: *we want each viewer to have access to the data they need — no less but also no more. Some users might need to be able to see a more granular view of the data — others could suffice with an overview.*

HiSense - creating better dashboards

Team Member **DASHBOARD**
 Team
 Platform Electra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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Design Principle	Initial concepts
Making the complex simple	This is also referred to as the 1.5 second rule – if it takes the user more than 1.5 seconds to recognise the function then simplify further. This is of course highly subjective. We will test a group of Rotarians on scanning the tiles and guessing what to explore. Whether that takes 1.5 or 5 seconds is immaterial. The key is context and navigation. This will be helped by using txt messages with links to the Dashboard. This is called a call to action txt and has proven to be a very simple and popular form of cutting out the complex – which in reading this paper you are experiencing and we are grateful for your attention !!!
Tell a clear story	Members will come to the DASHBOARD with different objectives – check on this or do that. The feed to the DASHBOARD , through calls to action, whether by email, txt or member need is important. Once a member gets to the DASHBOARD then, with a mobile first strategy, the members information needs must be serviced.
Expresses the meaning of the data	For example a members enquiry about dues does not need to display a statement of an invoice. A total with # of invoices outstanding will inform. A link to pay may help but payments from mobiles are not trusted by many.
Reveals details as needed	On the previous example of dues rendering invoices to a mobile device as noted not enable the next action which is payment. That can be 'revealed' by with actions buttons such as <i>"Email a statement"</i> or <i>"Remind me to pay"</i>

Graphics, as noted above can be developed, once the functional tiles and panels are established.

We have talent within Rotary but if needed can access freelancers who specialise in these graphics.

Example graphics for design inspiration can be found on [Pinterest \(here\)](#) and many UI designers freelancers sites such as [Dribbble \(here\)](#).

A starting point to get some ideas about **DASHBOARD** can be found on You Tube.

Note: some of the examples on You Tube are based on specific software systems but can be useful to generate ideas and creative thinking.

Team Member **DASHBOARD**
Team
Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56



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Some links:

1. [3 Elements You Should Add to Your Members' DASHBOARDS](#) [Build a Great Experience for Your Members](#)
2. [WishList Member - How to Create a DASHBOARD for your Members](#)
3. [Creative thinking - how to get out of the box and generate ideas: Giovanni Corazza at TEDxRoma](#)

Team Member **DASHBOARD**
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Platform Flectra ERP
Project Start Date 8 December 2022
Revision Number 56

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APPENDIX 2

Initial Integration plan for the **DASHBOARD** App

The Technical Staff

STAGE 1

1. create CI/CD dev branch – DONE
2. get commitments for initial funding – STARTED
3. start work with setting up development environment and tools – DONE
4. configure security roles and identity management – STARTED
5. expand VIEW models supported by **DASHBOARD** tiles – DESIGN REVIEW
6. specify add or expand MODELS and CONTROLLERS – POST DESIGN REVIEW
7. deploy STAGING - - SECOND DESIGN REVIEW
8. develop to release candidate – THIRD DESIGN REVIEW and READINESS ASSESSMENT
9. write a manual and do a YouTube HOW to – TB D
10. test a Club – TB Scheduled on READINESS ASSESSMENT
11. deploy to Clubs that have on-boarded – IMMEDIATE ON COMPLETION OF READINESS ASSESSMENT reaching PRODUCTION GO-LIVE
12. train the trainer
13. start next phase

STAGE 2

- (a) STAGE 2 – work programme – review USER enhancement requests – filed through Helpdesk
- (b) STAGE 2 PROJECT 1 Flectra integration – expand Events
- (c) STAGE 2 PROJECT 2 Flectra integration – Oceania Clubs – expand Rotarian search
- (d) STAGE 2 PROJECT 2 Flectra integration – Oceania Clubs – expand Rotarian skills search

Team Member **DASHBOARD**
 Team
 Platform Flectra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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APPENDIX 3

FAQs

Question	Answer
Are there alternative apps?	A review of alternative apps has been conducted. The TEAM DASHBOARD app from the RC of Whakatu was a candidate but at the end required a lot of work to integrate and connect with the data store in Flectra and the DASHBOARD is fully integrated and can be developed now.
What about the ClubRunner app	The Clubrunner app links in and relies on Clubrunner and while the ClubRunner app provides a Club member directory and some member attendance functions it does not provide the communications and organisation features in the Team DASHBOARD app.
RDU had an app – what is happening with that	Currently that app is removed from the app stores. We are not aware of any development plans.
And Roster on Wheels from India?	This app is like ClubRunner and cannot operate with the Roster on Wheels backoffice. That backoffice does not have the modules that are installed in Flectra and is not open source. We have had discussions with the Roster on Wheels team and the costs would exceed the DASHBOARD app development and would leave us without accounting and other services.
Does RI have a Club app	No
What other apps have been reviewed?	Several other apps have been reviewed. We have made direct enquiries with the Rotary Connect app team from Europe. The app does not have all the features of the DASHBOARD app but is a viable option. Again development would be required.
On the DASHBOARD app is there a SWOT analysis?	Not a full analysis at this point, more some comments from feedback from the users, presentations, source code review. SWOT comments Strength – partial developed and in use in New

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 Team
 Platform Flectra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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Question	Answer
	<p>Zealand. Source code is and will continue to be available and the DASHBOARD, once extended can be provided in the Flectra subscription.</p> <p>Weakness – we have to do it</p> <p>Opportunity – available by mid February if funded now and can be developed to ensure that delivers benefit to members and Clubs</p> <p>Threats – lose of current market lead by adoption of other systems.</p>
<p>Are there specific examples of the DASHBOARD providing new energy and directions through the ProjectOne vision?</p>	<p>Yes.</p> <p>In discussions with those that have seen the RC Whakatu app the consistent feedback is how the app could provide for opportunities to do the things that we know retain members. We cannot use that app due the reasons stated above. For example can we do more with 'attendance'. Attendance is seen by many as boring box ticking but imagine if attendance could be automatically logged as part of Club events or activities and linked to providing a reward feedback. The service by Members is an economic gift. The old Rotary had many ways that 'gift' could be recognised and acknowledged. Those recognitions still exist but we no longer have the data to make the recognitions happen.</p>

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APPENDIX 4

The Whakatu App main menu as a checklist for **DASHBOARD**

WITH THANKS TO THE RC WHAKATU TEAM

Whakatu App Menu	Flectra DASHBOARD (Portal) Buttons to be developed	Flectra Backend Existing Note in progress is subject to funding	Notes
1. Home -	N/A	Individual DASHBOARDS	This is an existing module but is not simple enough for use without training.
2. Members	Directory	Contacts thru to Membership/ Skills/ Sponsors/ Donors/ In progress Volunteers	Access can and will be controlled to prevent inappropriate access. Some requirements will need to be sorted at a workshop.
3. Meetings	Events	Full event management Club meetings through to District or national conferences	The event management module provides extensive out-of-the-box functions. Templates provide a starting point for the different types of events. From there “track” can be added to add member duties and, speakers and requirements.
4. My Duties	Tasks	In Projects	Flectra supports shared tasks.
5. Help Requests	Chat	Web and internal	Chat is enabled and can be configured for different groups
6. Help Request Templates	Chat channels and chat from messages, email or txts	Channels	Help desk tickets get auto-routed to teams and can be then allocated to a project as a task.
7. Club Calendar	Calendar views – my, Club, trust ...	Personal to combine view calenders	Calendars can be displayed at various levels.

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 Platform Flectra ERP
 Project Start Date 8 December 2022
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Whakatu App Menu	Flectra DASHBOARD (Portal) Buttons to be developed	Flectra Backend Existing Note in progress is subject to funding	Notes
8. Assign Duties	Tasks	Template tasks In progress Attach projects to events	Duties for meeting can be assigned through Tracks
9. Manage Users	Flectra Backend	Multi-level user control from Portal users – don't require backend functions 'Internal' backend users are controlled by ROLE permissions	Flectra has a very comprehensive user management system.
10. Email and Txt Records	Flectra Backend	All emails sent from modules are tracked and can be generated from specific parts of the system such as TASKS Txt to any contact is being organised and the funding of this project includes completing setup of a txt portal.	Emails can be sent from anywhere – for example from a 'track' on an event to both members and other e.g. speakers. Txs on events or to Club members will need a txt gateway account.
11. Manage Roles	Flectra Backend	Roles on tasks can be managed by template tasks	Template tracks can be supplemented by adding projects to events and then using tasking and even sub-tasking.
12. Manage Role Actions	Flectra Backend	Tasks	Roles actions can be managed by scheduling.
13. Member Invitations	Events	Various from Contacts to specific on say events	Emailing is available at all levels
14. Manage Duties	Flectra Backend	Tasks	See Above
15. Manage Meal Types	Flectra Backend	Event Products	Products can be attached to events so you can have orders for say "Gluten free lunch: etc

Team Member **DASHBOARD**
 Team
 Platform Flectra ERP
 Project Start Date 8 December 2022
 Revision Number 56



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Whakatu App Menu	Flectra DASHBOARD (Portal) Buttons to be developed	Flectra Backend Existing Note in progress is subject to funding	Notes
16. Manage Membership Types	Flectra Backend	Membership	Flectra's membership module manages this.
17. Planned Absences	Flectra Backend	Member/Volunteer calendars	System can provide – configuration and use case issue
18. Manage Email Templates	Flectra Backend	Full templating	See above
19. Manage Help System	Flectra Backend	Helpdesk	See above
20. Events Error Log	Flectra Backend	System email logs	
	Rotary News	Multiple tools from newsletters, forums, blogs	
	My Account	Membership	
	My Donations	Donations	
	My Causes	Tags	
	My Skills	In progress Volunteers	
	My Certificates	e-Learning	