Member Platform Meeting

April 24, 2025 at 10:00am CDT

Meeting Notifications, Agendas, Past Notes, Slack Channel

See [Meta] Member Platform meetings

Who is here?

Include your Drupal.org username in parenthesis if you have one.

- JD Leonard (jdleonard)
- Rob Carr (robcarr)
- Bhavin Joshi (beautifulmind)
- Paul McKibben (paulmckibben)
- Lee Walker (mr_scumbag)
- Bob Snodgrass (bsnodgrass)
- Luke McCormick (cellear)
- Steve Ayers (bluegeek9)
- James Shields (lostcarpark)

What Topics Should We Discuss? / Limited Human Notes

- Recording
- Quick introductions
- AMA ("ask me anything") with CRM (#crm) module maintainer Steven Ayers
  - Overview of CRM's goals, plan, and architecture
    - Motivation: Steve needs a CRM Case module
    - Custom email address, telephone fields working
    - Custom address field more complicated
      - Might need an Address entity type
    - Relationship Entity
  - Why not CRM Core or Redhen?
    - CRM Core (not CRM)
      - Individuals one Entity Type and Organizations another Entity Type (as opposed to bundles of one Entity Type), making it hard to reference contacts (requires Dynamic Entity Reference module)
    - RedHen
      - Also has multiple Entity Types
  - Validate feasibility of adopting CRM as a base for Member Platform 1.0
  - How to simplify the UX
  - How the Member Platform team can contribute to CRM

- - ○ Come with any other questions you can think of!
    - ○ Relevant CRM roadmap discussion:
      https://www.drupal.org/project/crm/issues/3483002 ("Membership" issue)
  - Next steps and assign action items

Action Items

-

Fathom AI Summary

VIEW RECORDING - 98 mins (No highlights)

Meeting Purpose

Discuss the CRM project and its potential integration with Member Platform, featuring an "Ask Me Anything" session with Steve Ayers, the CRM project maintainer.

Key Takeaways

- CRM project aims to provide a native Drupal solution for contact management, addressing limitations of existing solutions like CiviCRM
- Member Platform's integration with CRM could benefit both projects, leveraging shared development efforts and community input
- Key architectural decisions (e.g., contact entity structure, custom fields) need further exploration and documentation
- Balancing simplicity for MVP with flexibility for future use cases is a central challenge

Topics

CRM Project Overview

- Aims to create a native Drupal CRM solution, improving upon CiviCRM's limitations
- Uses a single entity type for contacts (individuals, organizations, households) unlike CRM Core's multiple entity approach
- Custom fields for email, phone, and address with plans for relationship management
- Currently in development, not yet ready for production use

CRM Architecture and Design Decisions

- Single contact entity type with bundles for individuals, organizations, and households

- Custom fields for email, phone, and address to handle multiple entries and types
- Relationship entity for managing connections between contacts
- CRM user entity to link Drupal users with CRM contacts
- Ongoing discussions about best practices for address fields and data deduplication

Member Platform Integration Considerations

- Potential to leverage CRM for basic contact management in Member Platform 1.0
- Need to simplify UI/UX for Member Platform while maintaining CRM's flexibility
- Discussions on handling membership data structures and user/contact relationships
- Challenges with shared email addresses and household memberships

Future Development and Collaboration

- Documentation needs identified for CRM project architecture and design decisions
- Potential for Member Platform team to contribute to CRM development
- Exploration of more generalized solutions for custom fields and data structures
- Consideration of advanced use cases (e.g., event registration, organizational memberships)

Next Steps

- Create documentation for CRM project architecture and custom field decisions
- Explore solutions for generalizing custom fields to leverage existing Drupal ecosystem
- Investigate handling of shared email addresses and household memberships
- Continue discussions on user/contact relationship management and data synchronization
- Define MVP requirements for Member Platform 1.0 integration with CRM

Action Items

- **Document CRM project's current architecture, data structures, and integration points to aid community understanding and contribution** - WATCH (5 secs)
- **Create mermaid chart or ERD of CRM project's current schema for visual representation** - WATCH (5 secs)
- **Create issue in CRM project to explore ways to leverage existing field types (e.g. address, phone) while adding CRM-specific attributes (e.g. primary, location type)** - WATCH (5 secs)
- **Document rationale behind custom fields in CRM project, explaining requirements that led to custom implementation** - WATCH (5 secs)
- **Investigate and document potential solutions for handling shared email addresses between multiple users/contacts in CRM context** - WATCH (5 secs)

Fathom AI Transcript

@0:00 - **JD Leonard (modernbizconsulting.com)**

Please go ahead and add yourselves. The recording is reconnecting, it says. There it goes. All right. So thanks, everyone, for joining another meeting for Member Platform.

Let's do some quick introductions. Very quick, and then we want to get to our main feature today, which is talking about CRM.

So, hello, I'm JD. One organization that I'm interested in eventually using Member Platform for is my Neighborhood Association that I'm on the board of, and I live in Austin, Texas.

I'm going to pass it over to Rob.

@0:49 - **Rob Carr**

Hi there. My name is Rob Carr. live near Perth in Scotland, and I've been dabbling around with member sites for ages, and I have lots of interests in getting decent membership sites going.

@1:00 - **JD Leonard (modernbizconsulting.com)**

I'm partially for... Troop of Scotland, but also for my local village, we're trying to buy the whole of the council.

Nice. Bhavin? Hi, my name is Bhavin Joshi.

@1:13 - **Bhavin Joshi**

I live in India and I've been working with Paul for more than 17 years now. I've been working with a few nonprofit organizations, and they have a requirement of using membership features, and this is why I'm here.

I'm interested in this.

- **JD Leonard (modernbizconsulting.com)**

Very good. Paul?

- **Paul McKibben**

Yeah, I'm Paul McKibben with the Atlanta Drupal Users Group. At least that's my primary interest for the member platform.

Good to see everybody.

- **JD Leonard (modernbizconsulting.com)**

Welcome, Luke.

- **Luke McCormick**

Hi, I'm Luke McCormick. So, my video looks like you're going to slow, but I can't look okay. Okay. I sell ear on various platforms.

So, I lived in. In Martinez, California, near San Francisco, I used CityCRM when I was working for the Drupal Association back in 2010, so that's my connection with CRMs, and I'm talking slow because I haven't had enough coffee, so next.

- **JD Leonard (modernbizconsulting.com)**

Thank you, Bob.

- **Bob Snodgrass**

Bob Snodgrass, St. Charles, Illinois, with Net2Community. We do a bunch of non-profit sites as well as regular for-profit sites.

I've had a pretty long history with CRM and also some membership sites, none of which were very well fleshed out, and I'm also running the Fox Valley Drupal user group, and we may have an interest in moving forward with the member platform at some point.

@2:57 - **JD Leonard (modernbizconsulting.com)**

Thank you, Bob. Lee?

@3:00 - **Lee Walker**

Hi, I'm Lee Walker from Chattanooga, Tennessee. I run the user group and the Drupal camp there. I did some Civi CRM back in Drupal 6 days, so it's been a while.

I'm looking for the member group because I do a lot of stuff with the scouts, and I'm interested to see if this would help the scouts out for either troop websites or even local councils.

Because their updates and keeping you up to date with what's coming on is terrible. So, I mean, it's really, really atrocious.

So what I can do to improve that for all the boys in my troop and things in the local council, that's really where I'm coming at it from right now.

@3:51 - **JD Leonard (modernbizconsulting.com)**

Fantastic. Well, welcome back, Lee. And James, you're up next. Quick intro.

@3:59 - **James Shields**

How are you doing for a bit later? I've been working with mostly science fiction conventions using Drupal. Also, I have a local Lego group that runs a Drupal site that I need to get up to a more modern version.

And I think member platform could be quite good for these things, if we can get it to where it needs to be.

I think that's me.

@4:39 - **JD Leonard (modernbizconsulting.com)**

Very good.

@4:40 - **James Shields**

Thank James.

- **JD Leonard (modernbizconsulting.com)**

And Stephen.

- **stevenayers**

Hi, I'm Steve Ayers. I'm from New Lenox, Illinois, and I'm the maintainer of the CRM project.

- **JD Leonard (modernbizconsulting.com)**

Very good. Thank you, Steve, for taking the time with us today.

- **Bob Snodgrass**

New Lenox, Illinois, you said? Oh, my God.

- **stevenayers**

Yeah, it's not too far. Yeah, very close. I stopped you on Drupal.org, Bob. I've seen your website.

- **Bob Snodgrass**

Okay, cool. And you've never met? Never met. Mid-camp. Yay.

- **James Shields**

Bob, we've been on Project Browser meetings before, so I forgot to say I'm in a place called Drogheda in Ireland.

- **JD Leonard (modernbizconsulting.com)**

Perfect. Okay. Well, let's dive in. So I have pitched this, somewhat without Steve's permission, as an Ask Me Anything for Steve as the maintainer of the CRM project.

So some background, if anybody's missing the background. So for member platform, one of the things, one of the big decisions we need to make is whether we are basing our product on an underlying CRM in Drupal.

And so Steve is actively developing. Steve is actively developing. A CRM kind of base project in Drupal. So I thought, Steve, maybe I could turn it over to you to just give a brief overview of the CRM project and your goals and the architecture, just to sort of bring people up to speed, because I'm going to guess that the vast majority of people on the call have not done more than looked at your project page.

- **stevenayers**

That's a fair bet.

- **JD Leonard (modernbizconsulting.com)**

And there's not much on the project page either. Indeed.

- **stevenayers**

We have heard a number of people comment they have some experience with CIVI CRM. I don't want to say CIVI CRM is terrible, but it's also not great.

Right? I think everybody will agree with that. Not great.

- **JD Leonard (modernbizconsulting.com)**

Never the diplomat.

- **stevenayers**

And, you know, they do deserve credit for what they're doing, but I think they have a failing solution, right?

No matter how much effort. They put into it, it's still going to be this sort of Pygmalion feature set on top of Drupal, and it will never be as elegant and smooth as a native Drupal solution.

So if I had a magic wand and could, like, have all the features of CiviCRM, but have it written in a native Drupal project, and so not be CiviCRM, that, I guess, is the goal of the CRM project.

I am also a co-maintainer of the CRM core project, if anyone has thoughts or questions about that one.

- **JD Leonard (modernbizconsulting.com)**

I wonder, Steve, could you maybe give an overview of CRM core versus CRM, given that you're a maintainer of both, as well as any context you can provide around Red Hen and any other sort of CRM?

What some things that you are aware of? Okay.

- **stevenayers**

So, right. CRM Core was successful with Drupal 7. They've had a number of releases, or at least more than one.

Drupal 8 and above, there are some dev releases, but they've never made a release candidate or anything of that nature.

But I used it on a project, and I used it on the dev branch. And the maintainer can no longer, or is no longer maintaining it.

So, right, there's nobody on that project. But the biggest difference with CRM Core between 7 and 8 is that in 7, contacts were a single entity type.

So if you're trying to track, like, a company or a person or something else, they're all going to have the same base table, right?

Nothing fancy there. But in Drupal 8 Plus, Making entity types became, like, super easy. So instead of having all the contacts be one entity type and just using bundles to distinguish what you're tracking, they chose to have individuals be one entity type and then organizations be a second entity type.

And I know what you're thinking. Well, yeah, that kind of makes sense. They're not really the same. But when you try to do anything more advanced than enter situations, then you need to either create a custom entity to maintain that relationship or you'll need to have – they ended up going with the Dynamic Entity Reference Module, which, again, didn't have, like, full releases.

And some of – it's got, like Two separate branches as well. One of them doesn't work on places like Acquia and Pantheon and other sort of Drupal-hosted solutions because of some nonsense in how it handles comparisons between MySQL and Postgres.

It's not important. means trying to do relationships between them is tedious and bad, and they were never really able to square that circle.

And I'm not, like, trying to proclaim I'm an expert here in Drupal, but if a node can be an event, an article, a basic page, and a bio, I think a contact entity type could be an individual person and an organization.

And they largely overlap. I mean, they're both going to have telephone numbers. They're both going to have email addresses.

And they're just... They're both going to have physical addresses, and they both have a name. Now, an individual has like a real name, or I don't want say real name, but it uses the name field in addition to having a label.

@11:16 - **JD Leonard (modernbizconsulting.com)**

I guess those would be the differences. I think that's great. Like, that sounds like the most important difference right there.

@11:25 - **stevenayers**

Red Hen also has a different entity type for an organization. I believe Salesforce does, the Salesforce integration module, I think, does that as well, although I'm not as familiar with that one.

But I'm not going to make any criticisms because the Salesforce one is about integrating with Salesforce. So decisions on what entities are what were already made by Salesforce for you.

@11:52 - **JD Leonard (modernbizconsulting.com)**

Interesting. So you're saying both CRM Core and Red Hen have multiple entity types to capture the concept of contacts?

Yeah. Yes.

- **stevenayers**

And one of the features that CRM core version 7 had was a duplicate contact finder, a deduplicator, if you will.

And that's a lot easier if all the entities are using the same tables for fields. So like, hey, here's this table of email addresses.

Are any of them the same? That's a lot simpler than like, I need to compare this table with itself and this other table.

I mean, it's not like it's rocket science, but all this stuff adds up. It's not an elegant solution.

@12:39 - **JD Leonard (modernbizconsulting.com)**

All right. I'm going ask one more question and then I want other people to ask some questions. My kind of last big question here is, can you talk a little bit about your motivation behind doing CRM apart from the architectural differences and what your vision is for it moving forward?

@12:56 - **stevenayers**

I need a... I guess the module is called CRM case, like a support case or a ticketing system or, right, it goes by several names, or an incident management system.

And in order to have that, you need to have some sort of contacts and they need to have some sort of relationships with one another.

And in order to really have a CRM, you can't just do one thing, you have to do many things.

I mean, okay, cool, I can, like, now provide support for our users and our customers and whatnot, but, I mean, what if I have to, like, send them and all of them in email, right?

Like, that's another feature, right? Back to that, if you're going to do one thing, you have to do many things to be a CRM.

And so, JD, I assume JD found the open issue in the backlog about membership, and that's why he reached out to me.

So, it does have a membership component. If you want to look... In the backlog, there is some discussion on it.

I think it needs to be updated with, I guess, maybe one more table and a little bit more data, but I think we're, I think we might have a workable solution.

- **JD Leonard (modernbizconsulting.com)**

I'm sure other people have some good questions for Stephen. Don't be shy.

- **Lee Walker**

Are we sure that building, I guess the question is, sure that building a CRM from scratch is the right way to go?

Are there other things out there? I mean, it's one of those things, right, that everyone built their own CMS and then realized this is just for the birds and picked Drupal or WordPress or something else, right?

Nothing tells you quite how hard it is until you try and build your own. There are going to be a few things out there.

Not necessarily Drupal related, but are open source.

- **stevenayers**

Well, I mean, that's a whole other can of worms.

- **Lee Walker**

mean, yeah, I agree.

- **stevenayers**

I write, I write Drupal codes. So that's what I'm doing. I did try to use other platforms like CRM core, but you can't.

One of the other issues with CRM core is this idea of like the community is just going to like provide you with fields that you can like reuse and infinite combinations.

And as it turns out, the existing email, telephone, and address fields do not fulfill the requirements of the use cases of the CRM.

Right. Like if you have more than one address, which one's your primary? Like if I'm going to send you an email, which, which one is it going to be if you have more than one?

Right. I'm not, you know, you just need it. There's a lot of work that needs to be done in order to have an effective native Drupal CRM.

I'm in. I think that's the reason why there really isn't one yet. I guess I'm strongly agreeing with you.

- **Luke McCormick**

I've got a question related to how you're comparing features between the two. I'm curious how you're tracking project features for your system, how you're doing the stuff that JD's doing right now, of wrestling in the use cases and prioritizing and kind of figuring that stuff out.

I've outsourced that work to JD. Per CRM?

- **Bob Snodgrass**

Nice pass.

- **JD Leonard (modernbizconsulting.com)**

Yeah, right. So Steve is lobbing that one over the fence there. So honestly, one of the things that I asked Steve about was, you know, hey, like, how do you want to collaborate with other people?

And, you know, the reality is... Most of us, if we're a developer, we need something. We look for something that exists that meets the needs.

If it doesn't, we go develop it. And that's effectively what Steve is doing for his use case, but he's also doing it with an eye toward general sort of needs with the context that he has from CRM core and sort of other kind of CRM needs.

And so it's the perfect opportunity, I think, for member platform to insert ourselves with our, you know, comparatively large set of interested people, right, to contribute to this CRM project and make sure that meets the needs of a lot of different use cases, right, and people.

So really what kind of attracted me to talking with Steve about CRM was, A, the architecture, because I think the architecture he's starting with sounds is very sound.

It's on very sound footing in my mind. And it's sort of the way that I would probably go about it.

And so I think, let me see if I put words in your mouth, Steve. I think what Steve is interested in, in part, is that we have a base of people who are interested, hopefully, in contributing, right?

And that we can all make CRM better while also ensuring that it meets the needs of member platform or figuring out how, you know, we can work with it.

And so I think, back to your question, Luke, that I think Steve is sort of not so much doing what you asked about, right?

And is seeking help because he has limited time to devote to this endeavor. And his, you know, time is basically spent right now on architecture and implementation and kind of go, go, go.

And probably, Steve, you could benefit from some more eyes, ears, and, you know, people down in the weeds and helping bring people into the project, et cetera.

@18:56 - **stevenayers**

Sure.

@18:59 - **JD Leonard (modernbizconsulting.com)**

Steve's much more concise. Bob, did you have a question?

@19:07 - **Bob Snodgrass**

Well, just an observation. We've already got a pretty large feature set with the member platform. Start adding in all the CRM stuff on top of that, it starts to become mammoth.

And even with great organization plan, it's going to be a long haul. So coming up with what that minimal viable product is in the front end is going to be difficult.

I've looked at a lot of CRMs over the years. I've worked with a lot of them that are not true.

Probably five or six over my time as a salesperson for 40 years. And none of them are great. And all of them that have been established have a lot of technical debt.

But... And that's where the real rub is in taking on something that's already existing. So those are just kind of my observations and comments right now.

I think this is a big area of need, and it's certainly worth going after.

@20:26 - **JD Leonard (modernbizconsulting.com)**

So, Steve, could you, to that point, speak a little bit about what your plan is to getting to a 1.0 release, what you feel like is missing, what that 1.0 release of CRM would include and what it would not include?

@20:39 - **stevenayers**

I mean, so there are three custom fields that are part of the base contact entity, or at least there's two that are in the dev branch and a third that is in a feature branch, and they're part of the base entity.

Right? Everyone's going to have a phone number, email address, and address. And you need to be able to define, is it like a home or an office, like what type it is and which one is your primary.

And so we have the email address and the telephone number working. The address, so I'm not looking to, it doesn't have to be a one-to-one feature set of CiviCRM.

But CiviCRM does have the concept of a household. And if you're a member of a household, your primary address is the address of the household.

And the head of the household can edit it, but no one else can. And so I've been trying to figure out how a feature like that could be implemented.

And I think it would need to make addresses a separate entity type. And then have some sort of special reference, or maybe it could be done with relationships, perhaps.

So the way of sharing, like, I don't think you would ever really have a shared email address the same way you'd have a shared physical address.

@22:17 - **James Shields**

I disagree. I disagree, too.

@22:20 - **Bob Snodgrass**

I know a lot of people that husband and wife share the same email. I sure don't.

@22:29 - **stevenayers**

Fair enough. I mean...

- **Bob Snodgrass**

We definitely have cases in our neighborhood association of that.

- **stevenayers**

So I guess those would also be under sort of the same bucket. I mean, I imagine a home telephone number would also be shared amongst the households, but I think that might also be a dwindling use case just with the rise of cell phones, though I know it is...

I know people still have landlines. But I think that might not be as big of a use case. As physically shipping something to somebody.

- **Bob Snodgrass**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

And so there are a few different, you know, potential problems to solve for, right, with these different fields. And Steve, right, you're trying to avoid duplication of data in multiple places and the task of managing that data, right?

- **stevenayers**

Yeah, I mean, CiviCRM uses multiple rows in the address table to accomplish this, but it has a field for, like, who owns it and who's just referencing it, basically.

So I don't want to replicate that. But I also don't know if just making it a straight-up field is going to fulfill all the use cases either.

So those are sort of like the hurdles to a 1.0 release or at least a release candidate.

- **JD Leonard (modernbizconsulting.com)**

And so what's actually in the CRM module is just... So the entity type with its three bundles, household, individual, and organization, and these potentially three custom fields may be an entity type for address or something like that.

- **stevenayers**

They're in a different module just because you can't define a field and use it in the same module for being able to uninstall stuff.

So they are technically in a separate module, but that's kind of pedantic. There's also a relationship entity there, so you can have relationships between the two or between different contacts, right?

Are you employed by this organization? Is this your mother, right, or relative? You can, you know, they're just entities, so you can define new bundles as you want.

And those are how I would imagine more granular control would be granted, right? It's one thing to grant a role, the ability to view or edit all contacts or all of one bundle, but...

... ... If you wanted to, say, have the parent be able to update the child's information, right, you probably want to do that with the relationship.

- **Luke McCormick**

Steve, I imagine JD understands the structure of the project by reading the source code, because that's the kind of thing that he does.

Yes. I tend to look more at, like, documentation stuff, but there isn't any. Your read me is three letters.

So I'm curious where I would go to sort of understand the integration challenges. What we're looking for with Member Platform is to try to get the power we need to keep track of people without having to...

Um... You know, write it all from scratch. So the hope with something like this is that we can get that value from integration at less effort than, you know, creating the structures inside of our own code base that we need.

ACTION ITEM: Document CRM project's current architecture, data structures, and integration points to aid community understanding and contribution - WATCH

And so what the, how, how should we approach this? Is there, is there a place we could, you know, figure out where the integration points are going to be?

What the feature set might be as a roadmap, anything like that that we could sort of look at to chew on?

@26:35 - **stevenayers**

I don't think there's anything as advanced as a roadmap. We did start a Slack channel, though. I, I don't think there's a lot of discussion there yet about CRM.

I mean, I'm, I've producing code, but I really haven't been, I haven't really been aware of a community, I guess, would be the way I would put it.

I, besides JD, there's like one other person who's, uh,

@27:01 - **JD Leonard (modernbizconsulting.com)**

And so I think this is our opportunity, right, Luke, so we can contribute that, right? We can go and document, we can, you know, build that community and help ensure, right, that there are enough hands to make work in the CRM realm, and that, you know, it will meet the needs of Ember Platform, if that's what we choose to do.

I also think if our alternative is building the stuff ourself, right, you know, I think we should very much look at, well, can we instead turn and build some of that in the CRM project namespace ecosystem so that it benefits not just Ember Platform, but whatever other, you know, products end up leveraging CRM.

ACTION ITEM: Create mermaid chart or ERD of CRM project's current schema for visual representation - [WATCH](#)

@27:57 - **Luke McCormick**

Yeah, well, it'd be interesting to see, for example, the schema. just the schema. Yeah, That you have in mind.

And you've discussed it, you know, in the process here. There's another way you can, you know, get that down to like a chart.

So there's something so that we can see, you know.

@28:12 - **stevenayers**

Like a mermaid chart?

- **Luke McCormick**

I guess. I'm familiar with...

- **stevenayers**

It's not a particular type of chart. It's like markdown, but for charts.

- **Luke McCormick**

Yeah. Oh, yeah. Okay. Like render in SVG. Like an ERD. It's what I have in mind, right?

- **Bhavin Joshi**

I think we have a huge task ahead. We need to first decide whether we want to integrate all the features of member platform into CRM and vice versa.

Because we are going to heavily depend on CRM. And if you want to release a release of membership platform, we need to work on the CRM module quickly and make it stable and have at least one release in few months.

Thank Thank Otherwise, the new platform may not have an initial release for quite some time.

- **Luke McCormick**

Well, I mean, that's why I was curious about the schema. Because if we, I mean, we could throw together something super quick to, like, do, you know, to just making, you know, making quick decisions about how to solve some problems.

And, you know, we're going to do that, right? Right. But it would be, it'd be convenient for sort of long-term growth to not make it, you know, pointlessly incompatible with the things that you're working.

So if we can have, you know, understand your thought process and conclusions you've drawn about, you know, what's a good way to keep track of this stuff, then we can construct our logic.

So that it's as compatible with what you're working on as possible.

- **stevenayers**

I mean, it's not going to be what you're looking for, but there is some schema documented for the potential membership entities and structures in the CRM backlog under, I think it's just called membership.

I don't know if you've noticed, but I'm not particularly creative with the name of projects. It's a CRM.

- **Luke McCormick**

Let's call it a CRM. Where is the CRM backlog you speak?

- **stevenayers**

Let me at least find it to see. Oh, drupal.org forward slash projects forward slash CRM. then there's like that issue buttons on drupal.org.

- **Bob Snodgrass**

Just regular issues.

- **stevenayers**

Yeah, it's nothing special. just been.

- **Luke McCormick**

The backlog's in the issue, too, you're saying. Yeah, that's what a member platform's saying, too. So, I mean, I'm familiar with that.

- **stevenayers**

So, there's some structure there. need to update. Because I think we need an additional entity to track everything. So if I were to give a brief summary of the needs of member platform, is that you need to be able to track people who are memberships of different organizations, potentially multiple organizations in the same Drupal site, and potentially different membership.

I don't want say levels, but potentially, right? Maybe you might have a bronze versus a gold membership. And, you know, you're only really talking about people being members, but membership could also be based off of being a member of, say, a household.

Or membership could also be at, like, a corporate level. So by being an employee of an organization, you could also potentially have membership in, I don't want to say another organization.

I don't know if that's the right way to say it, but... I but... Okay. So

@32:01 - **JD Leonard (modernbizconsulting.com)**

A lot of different ways that things could be combined. it was interesting because I think one of the questions that that's bringing to my mind is because you mentioned relationships, right?

And you have this concept of relationships already and then membership. And I kind of think of membership as a separate concept.

It may map to relationships sometimes. But what's your take on that?

@32:25 - **stevenayers**

I mean, membership would not be a relationship.

@32:28 - **JD Leonard (modernbizconsulting.com)**

Okay.

@32:28 - **stevenayers**

I could say you could, we could, there could be potentials to having membership bundles that grant individuals membership based off of being a member of a household.

But that would happen like a hook or an event when the relationship was either created or when the membership is created in order to track that.

But that would want, you'd want that to be in a separate table because you may decide that you are going to delete that.

Great. Thank Bundle and, you know, you'd want to delete all the references to it too, but, or at least that's how I think of it.

- **JD Leonard (modernbizconsulting.com)**

And so for, for member platform, right, we've got our 1.0 scope and then we've got our beyond 1.0 scope and our 1.0 scope is very, is supposed to be very simple, right?

Right. It's kind of like meetup.com lite for one organization. And I think in that sort of scenario, right, in that scope, we basically, you know, if we use CRM, right, like we would store, we would need to store the members, right, as contacts and as users so they can log in.

And we'd have to sort of, you know, we would, we would dumb down and simplify some of the CRM stuff away because we just aren't interested in a lot of the CRM sort of the intricacies of the CRM yet, but post 1.0.

Then there become much more interesting use cases and relevant use cases to us for having an actual CRM that manages relationships and this and that.

So there's sort of these two different scopes. There's like the 1.0 scope and the beyond 1.0 sort of less defined scope, and that always makes some of the discussions a bit of a challenge.

But to your question about membership, Steve, so yes, like different types of membership with different names, with different durations, you know, they're covering different numbers of contacts, potentially, right, multi-person membership.

Like there are a lot of different potential scenarios there. And to, I forget who was talking about it, Bobin, right, to your point about we got to get to a release too.

I think my understanding is Steve is looking to get to a 1.0 release of CRM quite quickly, and that that is primarily...

Around the data structure, right? And is not really doing anything, you know, around UI. It's just sort of what's out of the box, right?

And so for member platform, I think for us, it's like taming that. It's like, can we leverage the data structure so that going forward, right, we've got a solid place where the information is stored and we can benefit from all the future innovations in the CRM space, some of which we may very well contribute.

- **Luke McCormick**

Yeah, I mean, it's a huge advantage for us if we don't have to reinvent all those wheels that Steve is patiently working through.

We can write a UI once the data structures are existing and kind of stable.

- **stevenayers**

I think really the only one that's still up in the air is the address. I mean, I suppose we could abandon the idea of having shared addresses or emails or phone numbers.

That aren't at least duplicate, you know, they could still be shared, but it would be duplicate data.

- **Luke McCormick**

Yeah.

- **stevenayers**

And then, I don't know. But, I mean, how it works, I'm just sort of thinking out loud here. could also be that we don't, you don't have that option in the widget, but in the formatter, we could show, say, shared address based off of relationships.

But, getting that data structure settled is really the last issue, preventing some sort of, you know, non-dev branch release.

- **Luke McCormick**

Yeah. Well, mean, you have to figure out what level of normalization you're looking at in order to move ahead.

Because there's always that tension, right? You're always on, like, one more level of abstraction to handle cases. And you gotta settle on something.

- **Bhavin Joshi**

I really work. work. We have to offer multiple options to the users about email as well as visible addresses, and allow them to set one phone number, one email address, and one physical address as primary email address, where all the emails will be sent through the CRM as well as from other parties.

So it's completely viable, and I will believe visible to have multiple options for all these fields.

- **JD Leonard (modernbizconsulting.com)**

And Steve, I guess one idea for the address is maybe as an interim step, if you have the sort of analogous custom field that you do for phone or email address, and because it is its own custom field with its own module that supports it, right, later.

You can kind of punt the decision on how to deal with the deduplication of data until a later time, because, for example, if somebody is creating a view to reference a context address, right, in the short term, it's a very straightforward kind of thing, just like the other custom fields you've created.

Longer term, maybe there's then an option, right, in the configuration, you know, that says actually use, well, I guess in the field that sort of points to another address somewhere else or something like that, right?

I almost hesitate to solve this overall problem at the start, because I feel like it could probably use quite a few more brains, quite a few more use cases to make sure it sort of doesn't flop.

- **James Shields**

My experience with CRM systems is you put a huge amount of effort into supporting, you know, sharing addresses and phone numbers and other contact data, and users end up just duplicating the data anyway.

- **stevenayers**

That's true.

- **Bob Snodgrass**

Yeah.

- **stevenayers**

mean, if we were to adopt, say, something similar to the address field, or maybe I should first preface that the reason why we're not using the address field is because it has columns in there for the individual, right?

And so it would never render correctly or as we would expect it to. So I don't know if maybe that could just be inherited with some changes or what we would want to do in that case.

Thank Thank Thank But I've also seen specialty address fields for, like, particular country that the address project doesn't cover because of, I imagine, reasons.

- **Lee Walker**

Yeah, addresses like time zones are way more complicated than you think.

- **Bob Snodgrass**

Oh, yeah.

- **James Shields**

Way more complicated.

- **Bob Snodgrass**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

So, Steve, if you were creating a custom address field, though, let me put it this way. Is there a way, would there be a way to wrap the address field contract module to support, you know, homework, other different types of addresses?

- **stevenayers**

I briefly looked into that. It might be possible, but it also requires more knowledge of the address field than I had at the time.

And I guess fields in general than I had at the time. Uh. It turns out fields are super complicated once you get beyond just like single values and widgets are hard to write or at least have them look good.

You were mentioning, I guess I'm switching topics on you maybe, right about the complexity of CRM and how being able to have more than one address or email address is a bit cumbersome in the UI, both from a data entry standpoint and also, you know, there's like three form out there.

There's three elements for a single row, right? Like, so there's a lot of stuff on the page. So it could be possible to have even more simplistic field formatters where you don't have option of selecting more than one address.

It's always the primary address and it will be like defaulted to home or work, maybe depending on the contact type.

To just sort of clean it up and make it simpler, but still maintain the underlining data structure. And if you wanted to or needed more control, you can always change the field widget to, I guess, more complex widget.

I mean, I don't have names for these.

- **JD Leonard (modernbizconsulting.com)**

Yeah, that makes sense.

- **James Shields**

So I just wanted to go back to something that was being said earlier. I think a question was asked about, do we have to invent something in Drupal?

Could we use something from outside Drupal? And I think the advantages of having a CRM inside Drupal are that it obviously integrates with things like views and references and references?

Yes. Yes. I think it Basically, the Drupal, so having the contact information as Drupal entities, I think, is a huge advantage for the project.

So, you know, I certainly feel it's worth putting effort into making it a Drupal solution.

- **JD Leonard (modernbizconsulting.com)**

So maybe thinking about what we would need to do for member platform 1.0, right, as it relates to CRM and kind of what our next steps are.

I mean, we basically, I think, just need to – so I actually don't think we need – we don't even need to develop the concept or the data structures around membership for our 1.0 because in our 1.0, if you're in the system, you're a member of that.

That organization, right? Of the hosting organization. So that's our cop-out, right? For our 1.0 is like, we don't even need that.

And it's something we could migrate to once it exists, if that doesn't exist from the start. So I think that might be a useful simplification for us.

And instead, we just focus on populating the contacts and simplifying the user experience by creating, you know, extending the field format or widget or whatever, To just kind of keep it sort of simpler for our needs.

So I actually think that member platforms needs for CRM for our 1.0 is not that great. It's like data structures exist and we need to figure out how to adapt, you know, the UI to be really simple.

Some of which might be applicable to CRM project. You know, not just member platform. You And so I think if we can contribute to the blockers that Steve has right now around address, that will help unblock us because then we will have a CRM project that we can depend on.

- **James Shields**

Going back to the address, would it be a viable solution to use the Drupal address field for now and look at adding a more specialized address field later with a migration path, or would that get us into trouble that we'd regret later?

- **Bob Snodgrass**

So my experience with the address module is that you can turn off those fields that you don't want to use.

Just get rid of first name, last name, for instance, and not have them even show. The other approach that you could take rather than using the address module and modifying the configuration.

The of it would be to maybe look at something like custom field, which allows within the entity to create a multiple, kind of like we had with, what was it, not field group, where you have a multiple, a multiple field form that you can fill out many times within a contact record, for instance.

But contact field or custom field will allow you to do that kind of thing, which is pretty nice. that might be another option of something that already exists out there to look out, to look at.

@46:50 - **JD Leonard (modernbizconsulting.com)**

How does custom field work?

@46:53 - **Bob Snodgrass**

Basically, you can add in multiple columns into a field. So that's... Field is seen as a single entry, and you can have multiple of those.

So something like phone number type, phone number, okay? And you can have multiple of those.

@47:15 - **stevenayers**

Oh. Yeah. I mean, for the other fields, that's how I implemented it, was with custom field. Well, not with the custom field module, but by writing, you know, custom fields.

@47:28 - **Bob Snodgrass**

Something like that, right.

@47:30 - **stevenayers**

And so you can define the different, you know, homework or whatever for either in telephone number, you know, and it's different for telephone number, email, and regular address, right?

Like you're not going to have a cell home.

- **Bob Snodgrass**

Right.

- **stevenayers**

I think what I'm hearing is nobody is saying that we really need a way of having people in the same household share the same address.

Okay. So I haven't heard anyone make that argument.

- **Bob Snodgrass**

Well, the fact is that a household will have an address, and there's multiple people in that household, just like you have a company that will have a main address, a corporate address, and then multiple location addresses, you know, and individuals may be assigned to an individual address.

I work in the San Francisco office as opposed to the Chicago office, for instance. So in that way, the address doesn't change.

The person might change companies, though, and that's where you start to run into difficulties in managing the CRM is do you want to keep the history of that person moving through time like in, you know, like a LinkedIn kind of thing?

Or, you know, there's a lot of tools out there that way exist. And I feel like none of them have really solved that entire problem.

I haven't seen it anyway.

- **stevenayers**

I agree. There's not like a, that's the best solution right there.

- **Bob Snodgrass**

Yeah, I haven't seen it.

- **stevenayers**

Maybe down the road we could do something with the relationships to make it work more how CiviCRM does with household addresses.

But yeah, think having its own address field that isn't related to a entity, like a special entity reference field to an address entity would be the way to go.

- **Bob Snodgrass**

Yeah. I mean, keep it simple. It's what we need to do. What do we need to do now? Not that we're building a perfect CRM.

- **stevenayers**

Well, I mean, I don't want to say that make the good the enemy of the. The perfect, or the perfect, the enemy of the good, I guess is how it goes.

I don't know which snarky kernel developer said it, but there's a saying that user space is just a test load for kernel space.

And so these other peripheral modules that aren't like, saying the word core doesn't sound right because there's a different project called CRM core.

But in order to build like the more advanced projects like a membership platform, or if you're going to do some sort of mass emailing or, you know, bulk physical mailing or something, besides just storing contact information in a database, like actually using it for something, the underlining data structure needs to be.

That's where I think I should spend my time is just making sure that's sane so that the more advanced features could be built without.

So rebuilding the foundation?

- **Bob Snodgrass**

Yeah.

- **Luke McCormick**

That's where I think a huge amount of value would come from. Because, I mean, obviously, these are complicated issues.

They always seem simple when you first look at them, but then you're like, you're digging, like, you get this exponential explosion.

And navigating the trade-off between, you know, simple enough to implement and get started versus flexible enough to, like, you know, not run out of steam when you start to do something.

I mean, that's where we all benefit tremendously from, like, you know, the time your neurons are spending wrestling with this stuff to try to find something.

- **stevenayers**

Well, in all fairness, it's a lot of work in CRM core, right? People used it because it had a following, but then these...

And these issues came up that made it not really a solution. If you need to do anything more complicated than just store a telephone number or an address somewhere.

- **Luke McCormick**

Well, I mean, it's going to be the challenge to keep it flexible enough for future things. But it's got to be something, you know, our users are probably just going to want to put in their name and their email address and nothing else.

And so, you know, everything that's like shows up with a little star as a required field loses half the audience.

- **stevenayers**

So, I mean, I'm not saying like the address is not required, right? The email address is not required.

- **Luke McCormick**

Yeah.

- **stevenayers**

I think you have to put something in for the name. Maybe. I think you have to do something in order to save it.

don't think it will accept just a blank contact, but.

- **Luke McCormick**

But, yeah, choosing the key. Not an easy choice. Not an obvious choice. So, let's bad It's not one that, like, rolls off.

You got to, like, you know, work really hard to get that right.

- **James Shields**

And is it using a Drupal name field?

- **stevenayers**

Yeah, I've contributed to the Drupal name field. I mean, I'm not, like, a maintainer or anything. I just add patches because, like, I use it and stuff.

So that name field is used for the individual bundle. That's just a separate field on that type. But when it gets saved, how it gets formatted then gets saved to the field that's, like, the name that's in common or, I guess, the label that's in common with all the contact entities.

Whereas in organization, right, it's just a field you type in because, right, they're not going to have a first or last name.

And then it would be the same thing with a household, I guess.

- **JD Leonard (modernbizconsulting.com)**

What about a scenario where there's someone who wants to use a pseudonym rather than their, like, real name? Yeah.

Drupal.org username, for example.

- **stevenayers**

So in that exact use case, what I would recommend doing is that there is a website field. So it has a dropdown box in which you can select stuff.

It's pre-populated with like Facebook and a few other things. And then putting in the URL to their Drupal.org user account, if you needed to track that exact scenario.

I'm thinking in place of their like having a real name, like some people want to remain anonymous-ish, right? And you would just put it in as their middle name.

Right? Like when you're entering your name, just, you know. If you want to be fancy, could even put it in quotes.

- **James Shields**

I mean, the, so that's a good case for the science fiction conventions I'm involved. With is that, that basically, you know, we, I think decades we've, we've had on, you know, going back to paper forms, we've had what name do you want on your badge?

And people have got over the years got very protective of their badge names, and they want to use their badge name at every convention they go to.

And if you don't get it right, they'll get very upset about it. So, but the convention needs to have their real name for, for, you know, actual administration.

So, so it's kind of, so we have the, you know, their, their, their name, which is only used by the admin, the organizers and the, the badge name, which, which is kind of their public name.

So, yeah, that's definitely something we want to, it might, might not be a 1.0 feature, but definitely would be something we'd want to be able to consider.

- **stevenayers**

There's a open EQ. There's the name project. For adding a nickname as a field. I am not strongly opposed to it, but I'm not in favor of it either.

I don't have any voting power, but my two cents is just putting quotes around the middle name is sufficient.

But by all means, like, add your use case to it would be, unless, I mean, the only other option I could think is you just add another field, right?

- **Bob Snodgrass**

I mean, they're fieldable entities. That's the easiest solution. That's probably what I would do.

- **stevenayers**

So there's a CRM user entity, which just links your user account with a contact, right? It's nothing fancy. It's a one-to-one relationship.

I want to avoid using the word relationship because there's an entity type of that name, but, right, it's just a relationship.

- **Luke McCormick**

And so... That's the problem with Drupal. It keeps hijacking words, and you can't use them anymore to mean anything else.

- **stevenayers**

And so you can change the word.

- **Lee Walker**

It's simplest words, right?

- **stevenayers**

Views, rules. It's generic. You can use the contact display name as the user display name in the same way the real name project works, right?

In real name, you have a user name, and then you can define another field that has, you know, in case of badge, for example, right, you could use that.

Is that tracking?

- **Luke McCormick**

Yeah.

- **Bob Snodgrass**

There are a ways.

- **Luke McCormick**

So we're at time. We should probably wrap it up, right?

- **JD Leonard (modernbizconsulting.com)**

We are at time. yeah, thank you, Luke. I do want to be respectful of everyone's time. As usual, I'll stick around for a few more minutes if anybody wants to keep chatting about things, but don't feel any pressure for anyone to do that.

Steve, thank you so much for taking the time to plug in here. And, you know, personally, I want to see us contribute to CRM and make it a success and, you know, help ensure it's.

- **Bob Snodgrass**

should now next

- **JD Leonard (modernbizconsulting.com)**

Long-term success while also making things easier for our projects. And so, you know, we'll talk a little bit more about that and kind of how to help there.

Please feel free to reach out when you have a need. You know, we'll try to direct people to the CRM channel and issue queue, but the reality is a lot of people are going to see things that are posted in our Slack channel.

So don't be shy.

- **Luke McCormick**

Steve, thank you for all the work you've done on this. I don't know, you know, I was asking questions and stuff, but I don't want to sound ungrateful.

Like it's clear that you're adding a lot of value here and I really appreciate it.

- **stevenayers**

Well, I mean, there's code there. I don't know if it's actually helping anyone yet.

- **Bob Snodgrass**

Is it installable today if I wanted to start playing around on a prototype? Pardon?

- **stevenayers**

You could play around with it, but I would not use it for anything production related.

- **Bob Snodgrass**

Of course not. I'm talking prototyping.

- **stevenayers**

Yeah.

- **Bob Snodgrass**

Yeah.

SCREEN SHARING: Jd started screen sharing - WATCH

@58:59 - **JD Leonard (modernbizconsulting.com)**

Here it is. is. Here Here Here Here Cool.

@59:03 - **Luke McCormick**

It's got contact types.

@59:09 - **JD Leonard (modernbizconsulting.com)**

It's got some fields. It has relationship types. What have I missed, Steve?

@59:23 - **stevenayers**

Maybe try adding a person. Or actually, it's already got people, contacts in it since you installed it. It'll have two by default.

Under content, there is CRM. I wasn't quite sure where to put it, but we can all see that JD likes Drush because he installed this site with Drush.

And so, in the same way there's user one, contact one is an organization meant to represent the Drupal site itself.

So whatever you put in as the name of your Drupal site. question. great day. Will be used to create, you know, contact one.

And then contact two is just user one.

@1:00:16 - **James Shields**

Is there at present anything that relates users to contacts?

@1:00:22 - **stevenayers**

Yes.

- **James Shields**

Okay, cool.

- **stevenayers**

That should also exist, but I don't think you'll see it here, though. So if you go to, as you might have noticed, there could be some work done here on the fields.

They're a bit...

- **JD Leonard (modernbizconsulting.com)**

No, that's perfect.

- **stevenayers**

Well, look at the email address. There is one, two, three, four, five, six, seven, eight, nine. Nine different elements.

Some of those should be hidden, like hold in bulk, like hold as if it bounces.

- **Bob Snodgrass**

Yes.

- **stevenayers**

Yes. Oh, Oh, The idea would be that you don't actually see those normally. I would think you could maybe have the ability to undo it or to make it hold, but there's not a bulk email module yet to send email, to check to see if it's balanced, to flip the flag.

- **Bob Snodgrass**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

I wonder, do you think that belongs on the core, like CRM contact, or like, I wonder if maybe it should be a more, I don't know, I almost wonder if there should be a different abstraction layer or some module on top that kind of adds that capability and a little more extensible.

- **stevenayers**

It's schemas, right? Like, these are fields, or these are columns in the field, so I don't really know how else to do that, like, later on without it having, those date fields should be hidden, though.

Right, they're supposed to just say when these things happened. And then reset is if you were to undo it.

I wasn't really going for functionality. I wasn't really going for elegance here. wanted to make sure that the code worked.

When you hit save, does the data get stored and retrieved in the expected way?

- **Bob Snodgrass**

Gotcha.

- **stevenayers**

Yeah, it's pretty fancy how you can have a single radio button.

- **JD Leonard (modernbizconsulting.com)**

It's almost like I've read HTML.

- **stevenayers**

No, actually, that was pretty hard. Somebody on Drupal Answers helped me figure that one out. Right, there's no actual physical address here, so we would need something like that.

But you were mentioning, JD, about having a simplified data input, right? If we got rid of primary, you can only put in one email address.

It's going to be home. And you don't get to see these hold or bulk or whatever fields there. As well, it's a lot simpler.

@1:03:02 - **JD Leonard (modernbizconsulting.com)**

Yep.

@1:03:07 - **stevenayers**

I believe when you save telephone number, the, so right, you can put in ASCII characters in there.

@1:03:14 - **James Shields**

They don't have to be just be numeric characters.

@1:03:18 - **stevenayers**

But when you hit save, there's a field that you don't get to see. Huh. I don't know if both should have location or type.

It's been a while since I've.

@1:03:27 - **JD Leonard (modernbizconsulting.com)**

Well, this looks like it's, oh, yeah. Well, I guess you have a, probably not both.

@1:03:33 - **stevenayers**

Oh, yeah, no, it would have type because it might be a fax machine.

- **Bob Snodgrass**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

Oh, a home fax machine.

- **stevenayers**

Yeah.

- **Bob Snodgrass**

home fax machine.

- **stevenayers**

Have you ever had to send legal documents and they're like, we need you to fax them. And you're like, yeah, are you kidding me?

This is not 1989.

- **Bob Snodgrass**

But it is the federal government.

- **stevenayers**

So I go down to the equivalent of the quickie mark and pay. $4 to use this fax machine. And then they say we didn't get it, send it again.

- **Bob Snodgrass**

Oh, boy.

- **stevenayers**

So, no, I guess that was intentional. But those are – you can configure those. There's stuff to do that.

I think under configurations.

- **JD Leonard (modernbizconsulting.com)**

Where am I going?

- **stevenayers**

Configurations. Configuration.

- **JD Leonard (modernbizconsulting.com)**

There you CRM.

- **stevenayers**

Right. Then there's, you know, location, phone, user. Right. So.

- **JD Leonard (modernbizconsulting.com)**

And there's a – part of why you have some of these things at the outset is so that more advanced features, right, that need to find the home address or the work email or whatever it might be, right, can kind of do that.

At the moment, these can all be deleted, though, right?

- **stevenayers**

Well, I don't know if you can delete all of them or not, to be honest. Well, mean, you can physically delete all of them.

I don't know what's It's going to happen in the field if you try to save it, if none of these exist.

I mean, that's a good thing to check and figure out, but I, you know.

- **JD Leonard (modernbizconsulting.com)**

More what I'm getting at is there's like a, part of the concept here is there are some known types, right, that can be referenced.

And so is it, do you think it's just a question of documenting that they should be used and, you know, not using something different if you don't have to?

Or, you know, should it not be possible to delete some of these, but maybe you can hide them or, you know, I don't know what the...

- **stevenayers**

I mean, I think main might be the only one I would say you can't delete if it's required to actually save something.

I mean, when we were working on CRM core, being able to distinguish things based off like... You know, mostly telephone numbers because you really want to be calling.

You want to know who you're calling, I guess, before you start dialing. Is it their house? Is it their office?

Is it their cell phone so you're pretty sure they're going to pick up or you'll get voicemail? Or is it, you know, could their spouse pick up?

Right. Here's the relationship between user one and contact two. It, again, says relationship ID, but this is not the CRM relationship.

Instead of relationship ID, that ID is the CRM user ID, which is an entity with two fields. And I think, I guess, a timestamp.

- **JD Leonard (modernbizconsulting.com)**

What's the theory behind having a separate entity for that as opposed to just an entity reference?

- **stevenayers**

Well, where would you put it? On the contact? Well, a lot of contact. Contacts. So first of all, organizations don't get those type of references.

So you wouldn't want them on those or the household. And so it only would be on the contact. And the majority of those are going to be null values.

And yeah. Yeah. Also, this code existed from the CRM core project. So it wasn't too hard to move over.

Being able to define, though, it as unique one to one. So like, what would be the alternative put it as an entity reference field on the user?

Well, not all users are going to necessarily have contacts, though, they should. And I believe there's a configuration so that it creates them when you create a user, like fires an event you can subscribe to.

And do stuff to before it gets saved.

- **JD Leonard (modernbizconsulting.com)**

So I think, I think there are a lot of things like this, right, that like, I think we need to dive into and understand better and document in the process.

And that will, like, at a minimum, the documentation will help everybody in the future, right, who wants to understand this, and possibly it'll turn up, you know, things that we would propose changing, and like, now's the time to do it, right?

- **Bob Snodgrass**

Right. I need to bounce, but Stephen, thank you so much for joining us today. Thank you. And we'll be in touch.

We're close. Let's get coffee sometime.

@1:08:30 - **stevenayers**

Okay.

@1:08:32 - **Bob Snodgrass**

Cool.

@1:08:33 - **JD Leonard (modernbizconsulting.com)**

Thanks, Bob.

@1:08:34 - **Bob Snodgrass**

All right, see you, everybody. I got to go over to some errands before I go to the office, or I'm going to be in trouble.

@1:08:43 - **JD Leonard (modernbizconsulting.com)**

You were saying, Steve, you had a few more thoughts?

@1:08:45 - **stevenayers**

If you click on settings, I think that's where the auto-create options, yeah. So create CRM user automatically, right? So if you go and create a YouTube says create.

@1:09:00 - **JD Leonard (modernbizconsulting.com)**

Contact when a user is created.

@1:09:02 - **stevenayers**

So CRM user causes the contact to be created? Basically. I mean, when you create the user with that check, it's going to create a user contact based off of the email address and username of the user, and then set up the relationship between them.

If you check that second checkbox there, we will even search for a contact with the same email address and not create a duplicate one.

And if you think these options are nice, but don't meet your use case, well, they probably don't. But you can write your own event subscriber and subscribe to this event, and then this stuff doesn't happen, right?

But can, with events, when you subscribe to them, you can stop propagation.

@1:09:54 - **JD Leonard (modernbizconsulting.com)**

Cool.

@1:09:55 - **James Shields**

Nice.

@1:10:00 - **JD Leonard (modernbizconsulting.com)**

That I'm still trying to wrap my head around is for these like different types, right? And basically when these are needed for a field, it requires like so far it's meant creating a custom field, right?

To leverage these. And I'm wondering in the same way that I think it was Bob had mentioned that custom field module, which I still don't know enough about, I can't help but wonder if there's a more general solution that would allow the reuse of existing fields to benefit from their formatters and things like, you know, let's say an address.

If we've managed to use the address field, then we can benefit from the large ecosystem of like mapping modules that know what an address field is and how to, you know, stick points on a map and, you know, just things like that.

ACTION ITEM: Create issue in CRM project to explore ways to leverage existing field types (e.g. address, phone) while adding CRM-specific attributes (e.g. primary, location type) - WATCH

Wondering if we could leverage the group to. Find a architecturally sound way to reuse existing modules and benefit from them.

- **stevenayers**

I'm not opposed to it, but I don't think you're going to find a solution there. I mean, I didn't spend all my time looking at it, but I also didn't spend no time looking into those options.

And these sort of features, being able to define what type of email address or other type of contact method, I guess, is how we'll refer to it as a contact method, is a feature request that is quite common in CRM core.

And I also believe I've seen requests for that in Red Hen.

- **JD Leonard (modernbizconsulting.com)**

To be clear, I think this feature is absolutely necessary. I'm just wondering about whether there's a way to avoid creating custom types of fields to, you know, just because then any additional integration work, you know, needs to be done to support.

I'm thinking, I mean, address is the most obvious one, but even telephone, right?

- **stevenayers**

That one's custom, though, for other reasons, too, because there's a column you can't see where we store just the numbers.

And whatever you type in with the ASCII is stayed just for formatting. But in terms of validation, I don't think I have the validation in there, but you can require it to be 10 characters or 10 numbers there in order to be a legitimate telephone number.

Is that 10? Yeah, it's 10. In the US, but it could be different someplace else.

- **JD Leonard (modernbizconsulting.com)**

There's a contrib module out there that handles international telephone validation and stuff, right? So I'm just thinking, like, can we avoid, because we're looking at, you know, global context here, Can we avoid effectively requiring a lot of rework on those sort of beneficial features by somehow leveraging?

For doing the existing work.

- **stevenayers**

I'm open to ideas.

- **JD Leonard (modernbizconsulting.com)**

Does anybody have any thoughts on, I don't know if anybody has expertise on this, but how we can kind of get this concept of like primary and location and stuff like that arbitrarily decorated on top of any field?

Well, I'll create an issue and try to point some people that way and see if there's a, you know, a workable solution.

I I wonder for the custom fields, maybe Steve, would you mind just documenting a little bit of like why they are custom so that that can help people understand like what the requirements are to maybe make them less custom?

ACTION ITEM: Document rationale behind custom fields in CRM project, explaining requirements that led to custom implementation - [WATCH](#)

- **stevenayers**

Maybe, yeah. Rem did it this way.

- **JD Leonard (modernbizconsulting.com)**

Steve, I keep telling you, that's not a valid reason.

- **James Shields**

It's, yeah, the, I think the, the core phone number has a country code part section to it, which, I suppose, I mean, it would certainly be nice to be able to, to leverage what's in the core, the core field without, you know, and add on top of it.

I don't know whether that needs a new field or whether there's some way we could, we can reference a field.

- **JD Leonard (modernbizconsulting.com)**

Well, as I said, I'll create an issue and try to collect. Thank you. Some brains on that problem. I'm going to struggle a little bit, though, to define some of what's happening under the hood here.

I know you mentioned, like, the, you know, letters converted to numbers is one thing, and there's what I can see.

- **James Shields**

So when you say letters converted to numbers, is that like 1-800-LAWYER or something converts to the, or is it just, it removes the letters?

- **stevenayers**

It removes the letters. It's not really letters so much as, like, and hyphens, right? Like, you can put that stuff in there, because that's unique to, I think, different regions as well.

Like, the UK, like, put spaces in there, and they have a different, like, it's not 3-3-4, it's, I don't know, different 2-2-7?

I, I, I, don't know. I'm not pretty sure.

- **James Shields**

Yeah, I think the UK, yeah, I think the UK has a few different formats, depending on, um, And I think they've got it to that all their numbers are the same length.

- **Rob Carr**

No, they're not all the same length because I've had a nightmare with this. So I just end up taking a lot of the validation out of it's just ASCII characters.

That's what it is because they're always different and people put spaces and hyphens and all sorts in there. So, you know, you've got to kind of leave it ambiguous.

I dread to think what other countries are like.

- **James Shields**

Yep.

- **JD Leonard (modernbizconsulting.com)**

Do we have any other questions for Steve or Steve, anything else you think we should see?

- **stevenayers**

I mean, you could maybe hit edit on the organization or change the URL to contact one, right? Or just to see that it's slightly different, but it's basically the same.

Oh, yeah. There's a bunch of tabs, too, right?

- **JD Leonard (modernbizconsulting.com)**

Yeah. You mean like relationships and stuff? Oh, bug. Here's an organization.

- **stevenayers**

Yeah, I mean, if you click on view, there are tabs here too for your like relationships. Notes need to be updated to say comments because they're really just comments.

And then membership would be another tab here because to be a member, membership requires an organization for you to be a member of.

And in theory, you could create a bundle. When you create a bundle, you'd be telling it which organization the bundle is for.

So if it can have membership, that's where they be listed.

- **JD Leonard (modernbizconsulting.com)**

Got it. Or at least that's my thought process behind it.

@1:17:55 - **stevenayers**

Got it. And so, right, the forums can definitely need some work and they need to, you know, have better weights associated with them.

@1:18:09 - **JD Leonard (modernbizconsulting.com)**

Remind me, I know you said this already, but what was the reset date for?

@1:18:12 - **stevenayers**

I know it's supposed to be hidden, but. So, right, a hold date is when you're not going to be sending email and then when you reset that to start sending email again.

@1:18:22 - **JD Leonard (modernbizconsulting.com)**

Oh, okay.

@1:18:23 - **stevenayers**

That's what it is.

@1:18:27 - **JD Leonard (modernbizconsulting.com)**

Yeah, one thing I'm thinking about is, like, that's going to be valid for different mediums, right, of communication. So, while this is for email, like, that could also be relevant for phone.

@1:18:41 - **stevenayers**

Well, like a vacation hold almost. I mean, I don't know. I think there might be a feature like that in the issue for address.

Telephone number. You're, you're not, I don't know, there's, you can do robo dialing, but I wasn't really thinking about that in terms of.

Feature set.

[@1:19:01](#) - **JD Leonard (modernbizconsulting.com)**

Yeah.

[@1:19:02](#) - **stevenayers**

But if you email stuff out, you're going to get a bounce. It's not a legitimate email address, at least sometimes you will.

And sometimes you'll get the postage returned to you if, you know, no such person or if it's no longer a legitimate address.

To be able to mark that more manually. But, I mean, it's a good point. They would probably want to have some way of marking a telephone number as bad if not just outright removing it.

But, I wasn't sure what the automated feature would be. I guess it's really one for address, but I was thinking about email servers providing a bounce notice in this use case.

[@1:19:47](#) - **JD Leonard (modernbizconsulting.com)**

We've talked about member platform adopting some sort of, you know, communications framework to support sending things out, you know, by text, by, what's.

what's. what's. what's. what's. Thank App by email, you know, things like that, which would, you know, need to handle also preferences for different, you know, means of communication on different topics or things like that.

I'm wondering how this would interact with that. I guess it doesn't matter. could just ignore it, right?

[@1:20:23](#) - **stevenayers**

I mean, I guess you could, but I think you wouldn't want to send something to a known bad email address.

[@1:20:30](#) - **JD Leonard (modernbizconsulting.com)**

Does that mean there might be a framework on top of this that is handling that across different means of communication?

- **stevenayers**

I mean, I could see that for WhatsApp, and I could see potentially using something like MailChimp, right, to do the mailings, and that would handle the retries and the bouncing.

Is that what you're talking about?

- **JD Leonard (modernbizconsulting.com)**

Yeah, are. Yeah, kind of. And we have, on the MailChimp front, we have aspirations to sort of... Replace MailChimp, a very simple version, right?

So that you don't need to pay a third party for another service and integrate and all that. I mean, a member logs into the website and want to manage their communications preferences, you know, on these different topics, they're going to want to be communicated with by email or by SMS or by WhatsApp or by WhatsApp.

Whatever, right? Depending on what the organization needs. And presumably there might be some handling of bounces and stuff sort of at that level that would be specific to CRM, but would be specific to just a platform for managing communications.

- **stevenayers**

Well, in terms of like a preference, I mean, I think that would probably like if you only wanted to be contacted by SMS.

Thank you. So not by email, for example, I think that's going to end up being either a separate field or since they're logging in to set their preferences, you know that they are a user, but you probably might want to be able to do this even for people who aren't users.

So it's probably going to have to be a field and you can't rely on there being, quote, user data, right?

User data service.

- **JD Leonard (modernbizconsulting.com)**

Agreed. That's a general challenge that we're going to face, right? It's like any features that work for users right now probably doesn't work for contacts.

We got to, you know.

- **stevenayers**

It probably would be a separate field and we'd probably have to know more about the communication method before really doing anything.

I mean, like if your preference is to be. Contacted by SMS, there's not really anything we can do in terms of putting another field or removing a field from email address or the telephone field to indicate that.

- **JD Leonard (modernbizconsulting.com)**

Sure.

- **stevenayers**

But I do have another meeting to go to in about five minutes, so if anyone's got any more questions, I'm happy to answer them, but otherwise, we should be wrapping this up.

Sounds good.

- **James Shields**

One thing springs to mind is, possibly not just a question, so much a question is something we should notice, something to think about is basically, you know, synchronization of things like email address between the user and the contact.

If somebody updates their email address on the contact, should it also update on the user? Yeah.

- **stevenayers**

Well, JD had some thoughts on that, and I could see how you may want to have your contact preferences in the CRM be different.

ACTION ITEM: Investigate and document potential solutions for handling shared email addresses between multiple users/contacts in CRM context - <u>WATCH</u>

They generally expect you to have an email address for an account, though it's not technically required.

@1:24:34 - **JD Leonard (modernbizconsulting.com)**

Maybe take the case of, you know, a couple in a household who share an email address, but both need to log in.

It's an oddball one, right?

@1:24:45 - **James Shields**

Yep.

@1:24:52 - **JD Leonard (modernbizconsulting.com)**

But I would say a real one in our everyday needs for our neighborhood association.

@1:25:00 - **James Shields**

True. I mean, I suppose it does lead to a question of could we make the CRM the primary source of contact information such as email address and explicitly not have an email address on the user because it would be basically duplicate information.

@1:25:31 - **stevenayers**

I think you're going to run into more problems by not having an email address there for the user than it would save us.

I do think that by changing the email address on the user, at very least, it should ensure that that email exists on the contact.

Whether or not that's made the contact's primary email address, I think, could be debated. But, yeah, there should be some type.

That's another reason why that CRM user entity exists in order to. I guess it doesn't directly provide facilitation, but when you would update your contact information, you'd want to be able to have the user and the contact be in sync.

Instead of putting like an address on the user, we would probably want to just give them a tab on their user profile somewhere to update their contacts, you know, address and telephone number.

- **James Shields**

Great.

- **JD Leonard (modernbizconsulting.com)**

I'm thinking maybe, I kind of like the idea of removing the email address from the user, but still having the username, which could very well be an email address.

I know Steve had to drop it. Because then we're not duplicating the email address as an email address. It's duplicated as a login credential.

That's kind of a separate thing.

- **James Shields**

Mm-hmm.

- **JD Leonard (modernbizconsulting.com)**

Although it does bring up the question of how do you reset your password. Yeah.

- **James Shields**

Yeah, I mean, it might have to be a, I I think there's probably a lot of modules that assume the user has an email address and, you know, that we could be breaking things for other modules that people may want to use on their site.

So, but it could be maybe, you know, that the user entity has an email address on it, but it's hidden from the display and kept synced with the email address of the contact.

- **JD Leonard (modernbizconsulting.com)**

I'm wondering, that's interesting. I'm wondering, though, like philosophically, right? We're moving to a concept of the information about the contact lives on the contact, not on the user.

So. If there's a module that is assuming there's an email address on the user, well, what's it doing with that email address?

If it's contacting them, then it's not leveraging the source of truth for how to contact them.

- **James Shields**

True.

- **JD Leonard (modernbizconsulting.com)**

So while, yes, we might break something, that might actually be a feature so that people are not relying on basically poor integrations because they don't exist in the context of contacts.

- **James Shields**

Yeah. I mean, I say it might break modules that assume an email address. I don't know off the top of my head know what those modules might be.

- **Rob Carr**

I think you create a lot of problems if you actually deleted the user email field, but I think it'd quite easy to hide it.

The only thing would be that I've got really used to now, nearly every website I go on allows the login via using your email address and password rather than some made-up username.

- **JD Leonard (modernbizconsulting.com)**

Yeah.

- **Rob Carr**

Yeah. And if you're hiding that user email field, it will be tricky to update that, you know what I mean?

But it goes back to your point you raised earlier about synchronizing changes, you know, for changing the primary email is made to link to that user account, should it then go back and update the user account's details?

But that's kind of, I think that's beyond the MVP at the moment, really.

- **JD Leonard (modernbizconsulting.com)**

It is.

- **James Shields**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

I'm less concerned, I'm less concerned with the like, like, I feel like we could solve the duplication and the synchronization problems.

I'm more concerned about like, more foundational problem of like, we've got two people down the street who share an email address, like, we've got multiple cases of this just in our neighborhood, right?

It's a, it's a real, it's a real scenario. like, how do we get them to log in? Does Drupal support having two different email address, like having the same email address for two users?

- **Rob Carr**

Oh, it doesn't like it. I've been there. It doesn't like it at all.

- **JD Leonard (modernbizconsulting.com)**

Yeah. I seem to recall at one point.

- **Rob Carr**

Yeah, it won't let you set the account up because there is something on whatever hooks initiated. It looks to see if that email address already exists.

- **JD Leonard (modernbizconsulting.com)**

I mean, I guess for a login credential, you can use the plus one trick or something, right?

- **Rob Carr**

But I think when you're going down the joint email address, you're almost certainly in the joint household scenario. And it kind of goes back to that we haven't really defined accurately the schema and the data model that we need for membership.

A lot of what Stephen was saying earlier on about, you know, what constitutes being a member? Is it a household?

Is it an individual? I mean, I think it all comes back into play again. Because really, you're talking, you know, you'd have one Drupal user account associated with a membership, but you'd have multiple.

What you'd have to find is a way to allow each of those contacts to be able to log into the system somehow or gain some access to it.

You know, so it's almost like logging by proxy, you know, if you, yeah.

- **JD Leonard (modernbizconsulting.com)**

So I actually think you wouldn't, I wouldn't have a membership be associated with the user. I think that would be, effectively nothing should be associated with the user in my mind, apart from that entity that relates the user to the contact.

- **Rob Carr**

Okay.

- **JD Leonard (modernbizconsulting.com)**

Right? Like, then I think you need to manage permissions, like this contact can modify this contact's information, right? And like, I think everything kind of needs to be handled at the contact layer, because otherwise you're going to run into all these synchronization issues.

And, sorry, I lost my train of thought. There was something you'd said that was...

- **Rob Carr**

started. I was going toward, but I forgot what it was. Yeah, it's about the cardinality really of everything, isn't it?

And it's, you know, member contact and then, you know, membership plan or whatever it is, what other relationship we're going to do.

But then you've got all these other scenarios you've got to start thinking about, which is, you know, signing up for events, you know, because there wouldn't be an individual member sign up.

But there could be scenarios where you would want the individual, that member to sign up on behalf of all eight contacts within, you know, so you've got to kind of cater for both.

When you say cater to both, cater to one of the two things? So let's say you're doing a Drupal camp, which is the easiest one.

And we've had, you know, most cases, it's somebody signs up on Meetup or Eventbrite or whatever, and they'll have an email address and their details and they'll sign up and buy one ticket.

But we've had a few scenarios where we've had, like, a company wants to come along and they want to come along with eight people.

- **JD Leonard (modernbizconsulting.com)**

Yeah, and it gets tricky then.

- **Rob Carr**

I mean, you can set it up so people can buy more than one ticket. You think, well, how do you get the contact details for all those eight people?

And we've kind of failed on that problem. just get the contact of the person that's buying all the tickets because we need their payment details.

- **JD Leonard (modernbizconsulting.com)**

Yeah.

- **Rob Carr**

So, but then would that then become an obstacle to people signing up because they've then got to provide eight sets of contact details to buy a ticket?

And that would just be like, no, you know, that's another barrier in itself. So I think I see what you're saying.

- **JD Leonard (modernbizconsulting.com)**

Yeah. And I would say, yes, I think it does need to handle that case. And also the case of, I just want to buy eight tickets.

- **Rob Carr**

Yeah.

- **JD Leonard (modernbizconsulting.com)**

The rest is left as a future exercise for whoever is dealing with that. But I definitely think like, even just taking like a Drupal user group example, like we've got a couple, right?

That comes to our Drupal user group and like... The wife is always RICP-ing for her, plus one. It's her husband who's coming as well, right?

You know, on a member platform, would want them, want to be able to understand, well, who is it that's coming?

@1:34:14 - **Rob Carr**

Yeah.

@1:34:15 - **JD Leonard (modernbizconsulting.com)**

Right? And have a way for her to reference her husband, her husband's contact effectively.

@1:34:22 - **James Shields**

Right?

@1:34:23 - **JD Leonard (modernbizconsulting.com)**

And I think if you are already a member, there could already be a concept of you are related, right, to this other contact.

So maybe it even appears in a drop-down list or a search field or something if you want to RSVP then.

@1:34:38 - **Rob Carr**

Right?

@1:34:38 - **JD Leonard (modernbizconsulting.com)**

Like, I think that's one way to approach it. For a DrupalCon with a company, right, you could have somebody who's logging in, who has, you know, is paying on behalf of the company.

And anybody who is an employee of that company, they could select something, right, for the tickets. And maybe in the process, also create new contacts if they can't find them.

@1:35:00 - **Rob Carr**

Yeah, kind of thing would be feasible.

- **JD Leonard (modernbizconsulting.com)**

takes some work, right?

- **Rob Carr**

Well, and that's really kind of where you get into the point of the CRM, isn't it? Because you're trying, you know, if you're a company and you set up your own CRM, you're trying to grow your client base.

So the more detail you've got about your clients, which in this case is load of names and extra email addresses, that's a good outcome.

But it's just, you know, you've got to balance it up with how much, you know, how much of a barrier that can also present for someone.

I just want to buy tickets, you know, that kind of thing. But I think you're always going to come back to, which is maybe why, you know, I wouldn't necessarily be in the idea of a user account.

You're always going to have someone that's like the primary contact for that organization, that household, or whatever it is, or just an individual.

And, you know, the user account almost fits the bill, but you then have me having to replicate, you know, either do what Steve's proposed with the CRM module.

Where you're mirroring every user account with another CRM contact, and then that person becomes the primary contact, or you just have a special use case if you're just having, you know, the primary contact, their details just get stored in the user account, but, you know, that creates a world of other problems.

I know, it's not easy, is it? No, no.

- **JD Leonard (modernbizconsulting.com)**

Yeah, kind of, like, I think my philosophical approach is, like, I like the concept that contacts are managed as contacts, and that they're not necessarily associated with users, right?

That helps with separation of concerns, and then the scope of, kind of, problems is related to, okay, so somebody is a user, they are logging in, like, what can they do?

And what's that look like, right? And dealing with that, that synchronization, I think that's a, I think it's a solvable set of problems, and I think it's worth putting up with those problems to have the more, sort of, sort

Arguably elegant or sort of not intertwined concept of contacts versus users.

- **Rob Carr**

Yeah. Or do you go even further back and say that every single contact has a Drupal user account? But then we're back at the problem with duplicate email addresses.

- **James Shields**

you know.

- **JD Leonard (modernbizconsulting.com)**

Yeah. Yeah. No, that's interesting. I didn't think about that as the problem there. But yeah. Very good.

- **Rob Carr**

Well, I have to run, but thank you all. Yeah, me too.

- **James Shields**

Thanks so much.

- **Rob Carr**

Thanks sticking your head above the parapet and sorting it out, JD.

- **JD Leonard (modernbizconsulting.com)**

Keep going. One day we'll get there.

@1:37:37 - **Rob Carr**

Yeah, no, no. These things take time.

@1:37:39 - **JD Leonard (modernbizconsulting.com)**

All right. Take care of yourself. Bye.

@1:37:42 - **Rob Carr**

Bye.

@1:37:42 - **James Shields**

Thanks, Will.