Member Platform Meeting

July 17, 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 parentheses if you have one.

- Luke McCormick (Cellear)
- Steve Ayers (bluegeek9)
- Lee Walker (mr_scumbag)
- Bhavin Joshi (beautifulmind)

What Topics Should We Discuss? / Limited Human Notes

- Recording
- Quick introductions
- Call to be led by Steve Ayers (bluegeek9) of CRM module fame
- Thanks to Luke McCormick (Cellear) for providing the Zoom and handling the recording/transcript
- Come with topics or you'll be stuck with Steve's questions :)

Action Items

-

Fathom AI Summary

VIEW RECORDING - 56 mins (No highlights)

Meeting Purpose

Discuss progress on Member Platform development and identify next steps for key features.

Key Takeaways

- Alpha 4 released with Drupal 11 support and restructured relationship schema
- Membership module needs development, focusing on core entity creation and status tracking
- Documentation improvements needed, including updated ERD diagrams using Mermaid
- Key upcoming features: membership management, email sending, and case management

Topics

Alpha 4 Release Updates

- Converted many books from procedure-oriented to classes
- Restructured relationship schema: contacts now have cardinality of two
- Computed fields for contact A and B maintain form consistency
- Removed UIDs from several entities where ownership concept doesn't apply
- Performance improvements expected due to simplified querying

Documentation and Architecture

- Current ERD diagrams are outdated and need updating
- JD working on enabling GitLab Pages previews for documentation review
- Mermaid diagram tool introduced for creating and updating ERDs
- Need to break down complex diagrams into more manageable, entity-specific views

Membership Module Development

- New module needed to handle membership functionality
- Key features to include:
    - Entity creation for memberships
    - Status tracking (active, expired, pending, grace period)
    - Support for different membership types (fixed, rolling, lifetime)
    - Relationship-based access (e.g., household memberships)
- Payment handling and renewals to be addressed in separate stories
- Need to break down large feature request into smaller, manageable tasks

Other Planned Modules

- CRM Mailer/Email module for handling email communications
- Case management module for ticketing and issue tracking

Technical Discussion

- Explored Drupal entity structure and field definitions

- Discussed differences between traditional structured programming and modern object-oriented/functional approaches

Next Steps

- Update and refine membership module feature request, breaking it into smaller tasks
- Create updated ERD diagrams using Mermaid for current entity structure
- Continue development on email sending and case management modules
- Review and merge JD's work on GitLab Pages preview functionality
- Further define reporting and searching requirements for future development

Action Items

- **Create mermaid diagrams for CRM data structures; update JD's existing ERDs** - WATCH (5 secs)
- **Update membership feature request issue; provide better instructions; break down into smaller stories (e.g. entity creation, admin renewals, status tracking)** - WATCH (5 secs)

Fathom AI Transcript

VIEW RECORDING - 56 mins (No highlights)

@0:06 - **Luke McCormick (kiza.com)**

And this meeting is being recorded. Relax.

@0:11 - **steven.ayers**

Okay. Earlier this week, I believe, yeah, earlier this week, Alpha 4 was released. So, right, we only have Drupal 11 support, so we converted all of our, well, many of our books from procedure-orientated to classes.

The biggest change is that the relationship schema got rearranged, so instead of having contact A and contact B and just having a single contact per field, we have contacts with a cardality of two, and then we have computed fields for contact A and contact B.

So, the forms stay the same, but we have the contacts all in a single table. So, right, delta zero maps to A and delta one maps to B.

And this way you can search to find all the relationships that a contact is a member of by just querying a single table and a single column as opposed to contact A or contact B, right?

So, from a performance perspective, hopefully it will scale better, but it should appear basically the same because of the computed fields.

I guess we also removed the UIDs off of a number of entities just because they're not necessary. Having an author of a piece of content makes sense, right?

And allowing them to edit that content in some cases also makes sense. But the concept of ownership of contacts isn't really, it doesn't really translate over one to one.

So, right, it's something we've talked about, having UIDs on relationships and contacts and contact details just doesn't work. So, yeah, that's basically where we're at currently.

- **Luke McCormick (kiza.com)**

Okay, this might be a frequent question, but do you have an ERD that, I can look at you, you're describing contact, like, you're describing a schema.

- **steven.ayers**

Well, but they haven't been merged in. JD is working on an issue to allow previewing the content. Let me drop a link in chat what we have so far.

Oh, that's not... drop a link

- **Luke McCormick (kiza.com)**

Should we introduce ourselves, by the way? I'm looking at the agenda, and we skipped that. It'd be for if anybody ever watched the recording.

I don't know if anyone ever will.

- **steven.ayers**

I assume not. So our mermaid diagrams do work, but I guess as it turns out, our relationship diagram is now outdated.

So, no.

@3:32 - **Luke McCormick (kiza.com)**

Well, you have an ERD. just a fraudulent one.

@3:41 - **steven.ayers**

Right. There's an issue to have previews of this, and then there's also another issue for, I guess, having better documentation that JD made an attempt at.

Though, I also don't know how accurate it is at this point now that the code base has shifted from.

So.

@4:00 - **Luke McCormick (kiza.com)**

Well, do we have actually, do you have a graphical, you know, a of screen share and we can talk through it?

@4:07 - **steven.ayers**

I mean, I did drop the link into the chat, but it's not, it's not really worth showing you.

@4:15 - **Luke McCormick (kiza.com)**

Yeah.

@4:15 - **steven.ayers**

I mean, you can look at it, but I'm saying it's not really worth the screen share. All right, these are mermaid charts, so that was the idea.

We would have a diagram showing how the object relates to other objects, and then another, so right there would be like an ERD diagram, and then below that we would have a, like a class diagram or a little diagram of the actual schemas.

- **Luke McCormick (kiza.com)**

Yeah, so I mean, there's, for the benefit of our site challenge audience, I'll say that the, the diagram you link to has two entities with.

One-way connection between them from one entity's relationship and the other entity is contact. So probably, like, starting from just a list of entities would be the first step.

- **steven.ayers**

we've been on the home page. I guess we don't have that on the home page of the documentation, but it is on the project page.

- **Luke McCormick (kiza.com)**

Oh, yeah.

- **steven.ayers**

All right. So we've got three main entities that we work with, right? The contact itself, right? That's a person, a household, an organization.

You could create another type if you needed to, but it doesn't seem to be a strong demand. Contact detail, right?

That's like an address, a telephone number, an email address. The reason why we want to go with entities over fields is because you can expand fields.

Or, I mean, you can expand entities by adding additional fields. can't really add columns. The fields in a practical sense.

Like, it's So stuff that we would use, entities, so we could have, I don't know, tracking like if the address is still correct or if like an email bounces, right?

There'd be fields to allow those future features to integrate. And then relationships, right? That's a relationship just connects a contact to another contact, right?

They could be your employer, they could be your mother, they could be your sibling, right? Again, you can create other ones, it's, you I guess you can be members of households.

So those are the core entities that are involved. There are some config entities that exist, but they're not really as relevant, so.

I know we added group integration, I don't know if that was, how recent that was, though. know. I know.

Thank you. So, yeah, there are some stuff in the backlog to create some documentation and some ER. Luke, are you still with us?

Oh, yeah, you are.

@7:09 - **Luke McCormick (kiza.com)**

Okay.

@7:13 - **steven.ayers**

Your video looked like it froze for maybe a minute.

@7:16 - **Luke McCormick (kiza.com)**

Sometimes they get very still. Oh, my God.

@7:47 - **steven.ayers**

A-email to A-contact. Not looking to, like, build Roman a day, but the idea would be that other features. It could be built upon that in terms of just emailing.

And then there's another module that exists but needs some work for case management, right, CRM case. So I'd probably start spending some time on that.

So, you know, whatever your organization does or whatnot, you might have some sort of need for a ticketing system.

I mean, if you were some sort of, nonprofit that gave out, I don't know, solar rebates, maybe you would need to track those or something.

I don't know, right? It's just generic case management. So I guess maybe my question would be what is the member platform community looking for at this point?

In terms of features and I know JD is a big fan of filling out specification document. But that was not really helpful.

@9:04 - **Luke McCormick (kiza.com)**

Who am I? Well, here, why don't I go ahead and share. I've pulled up, hopefully, which one did it?

The current functional spec, I'm sure enough, if I did my sharing job correctly here. Okay. Let me just kind of scroll quickly through it.

And even though I'm sharing, Steve, you're still leading. So tell me, like, shout out if you want me to stop or zoom in on anything, okay?

I'm happy to see personas have been plugged in there.

@9:56 - **steven.ayers**

Yeah, I mean, a lot of this stuff has to do with, like, member management, which... ... It would make sense.

Though JD had mentioned how actual member management isn't, I guess, necessary for the 1.0 release.

@10:17 - **Luke McCormick (kiza.com)**

Wait, really?

@10:20 - **steven.ayers**

Well, I don't know exactly what he meant by that, right? Right.

@10:34 - **Luke McCormick (kiza.com)**

So here's, let's see how, I jumped ahead, trying to find the categorization, can we? Thank Probably slowing us down by trying to get too fancy with the categorization.

Welcome, Lee. I see you joined in. I don't know if you want to participate or not. Thank you.

@11:17 - **Lee Walker**

Sorry, Mike.

@11:19 - **Luke McCormick (kiza.com)**

No, it's okay. We're in summer mode. So we're all...

@11:26 - **steven.ayers**

We're just glad you're a real person and not a bot.

@11:30 - **Luke McCormick (kiza.com)**

Right?

@11:31 - **Lee Walker**

Have you had a few of those?

@11:33 - **steven.ayers**

No, but like Luke has the Phantom NoteTaker, and I think Sarah, who I have never interacted with, often sends a NoteTaker as well.

@11:45 - **Luke McCormick (kiza.com)**

I know Sarah. Yeah, all right. Yeah, so for it's worth, I was requested to bring my robot to take meetings at this one.

It wasn't me going rogue.

- **steven.ayers**

date she's been in. for Well, mean, I know who you are, right? Sarah sends a note taker, but I don't have a problem with it.

I just don't know.

@12:15 - **Luke McCormick (kiza.com)**

And wait if you start sending robots to in-person meetings, then you'll get the thing. All right. So.

@12:27 - **Lee Walker**

Sometimes I wish I could do that. So you just need a robot to turn up and say, this could have been an email.

@12:44 - **Luke McCormick (kiza.com)**

So, Stephen, what do you need help with? What if you had, you know, the resources of all the world's humans and robots to help you?

What could one of them or more than one of them do to assist you?

@12:58 - **steven.ayers**

Well, there's a message. Your ship feature request out there, right? I don't know if somebody really wants to dive into that one.

I know it's a big project or feature.

@13:21 - **Luke McCormick (kiza.com)**

We go over to, you have the CRM namespace, right?

- **steven.ayers**

Yes.

- **Luke McCormick (kiza.com)**

So, if did that, will that work?

- **steven.ayers**

Yep.

- **Luke McCormick (kiza.com)**

You're probably more comfortable with these.

- **steven.ayers**

Right. See the ability to preview GitLab pages in CI, right? That one JD is working on. And so, when that's done, we can review.

you. you. you. you. you. Thank Thank He's got an architectural one on here as well that's held up on that one being finished.

All right, document CRM architecture. So you asked earlier about like IndyRD and the short answer is there's one in that source code.

I don't know how accurate or good it is, but... It would be in the docs directory.

- **Luke McCormick (kiza.com)**

Oh, so there's another right spot there.

- **steven.ayers**

And I don't know if the diagrams are going to render or not.

- **Luke McCormick (kiza.com)**

Probably not. Nope. I like that. Readable file format.

- **steven.ayers**

Yeah, it's Mermaid.

- **Luke McCormick (kiza.com)**

Not familiar.

- **steven.ayers**

Markdown, but for charts is, I guess, tagline or something to that effect, right? It looks similar to Markdown.

- **Luke McCormick (kiza.com)**

can embed it in Markdown.

- **steven.ayers**

It renders that little diagram chart that you looked at earlier for Relationship.

- **Luke McCormick (kiza.com)**

Yeah, yeah. I had no idea that existed. I'm totally thrilled about that. I was delighted to discover fairly recently that SVG is surprisingly readable.

- **steven.ayers**

More so than JPEGs.

- **Luke McCormick (kiza.com)**

Yeah. Or PostScript or anything like that, right? PDF. Really? How I got no. go. interact? you.

- **steven.ayers**

So there is a member issue. It needs to be updated, I think, from what we've discussed. But I think enough of the – like, right, we're still probably going to be making alpha releases for a little bit longer, but I think we're getting closer to betas.

The schema seems to be settling down in terms of changes, right? We're still going to make schema changes, I imagine, but we're just probably not going to be significant, or at least smaller than they have been, I guess is how I would describe it.

- **Luke McCormick (kiza.com)**

Okay. So is there an issue?

- **steven.ayers**

I mean, something that needs to be done. don't know if this is documented there, but – There's a member item feature all the way at the bottom for membership.

Yep. All right.

- **Luke McCormick (kiza.com)**

Another add?

- **steven.ayers**

Well, maybe not all the way to the The bottom of where my screen was. It's going to be on the next page, I guess, because it's still open and not closed.

- **Luke McCormick (kiza.com)**

Oh, well, it's... What are we looking for?

- **steven.ayers**

Membership.

- **Luke McCormick (kiza.com)**

Oh, there.

- **steven.ayers**

So, right, this would be the idea of how we're going to track members to organizations. Some of this data model needs to be updated.

There's something in here calling about, like, a member log or something. That's just going to be included on the revision table of the membership entity.

But, right, they're bundable or subtypable. I don't know what the Drupal term would be at this point. would but...

But... Um, every membership type, uh, gets, corresponds to a particular organization, right? And then it also is allowing for only one type of contact to be a member of that membership type, right?

Having a person be a member is the simplest concept, but organizations and households are also something we'd want to cover.

And so that just determines who can be a member of this type, right? Uh, duration field got some updates.

It might, uh, it supports Drupal 11 now, so yay. Um, we could probably do something using plugins instead of having extra columns here maybe for determining how long the membership lasts for, but do you mean

- **Luke McCormick (kiza.com)**

Beyond having start and end in computing and based on that?

- **steven.ayers**

Well, so there's – somebody mentioned the idea of having – using a plug-in system so that it could be extensible.

And that does seem rather Drupal-y, right? Like that's how Drupal does it. But the other question is also – so there could be a fixed timeframe, right?

Membership starts at the beginning of the month and ends at the end of the month. Right? Regardless of when you join.

Or maybe it's for the next month. But, right, it's fixed time periods. There can also be rolling time periods, right?

It's 30 days, whatever it is, and it starts from the day you join. And if you join on July 15th, right, July 14th is – or August 14th is then when would be the last day of your one-month membership.

And then I suppose there's a lifetime membership, right? Right? That's Something that happens.

- **Luke McCormick (kiza.com)**

Sure.

- **steven.ayers**

But I can't really think of a fourth type. Somebody suggested or commented about having something more like a subscription model, where their use case is a nonprofit that publishes a newsletter.

But since people are volunteers, it doesn't often get published on time. So it's more like you get four newsletters or zines or something.

But that seems really more like a subscription than a membership. But I'm not sure if I want to split hairs over it.

- **Luke McCormick (kiza.com)**

Which field is this in reference to? Or what?

- **steven.ayers**

This would be in reference to like the duration of a membership. Right. I've only I only have three. Ideas that would really work.

And the one that was recommended as a fourth possibility really doesn't seem like a membership.

- **Luke McCormick (kiza.com)**

Oh, is that what Duration Unit is?

- **steven.ayers**

Basically, yeah. This is how it would be set up if we didn't have a plug-in system.

- **Luke McCormick (kiza.com)**

Ah.

- **steven.ayers**

We would just support these basically three types.

- **Luke McCormick (kiza.com)**

Oh, I see the problem. And then it's going to get burned in and hard to change, which is why you want to plug in.

- **steven.ayers**

Yeah, but then also... What are the other possible scenarios, right? And then how would we store that? Right, a start and end date makes sense, or having an end date makes sense if it's some sort of something that can be computed.

I don't know, maybe not entering it for a lifetime membership makes sense.

- **Luke McCormick (kiza.com)**

I don't know, right?

- **steven.ayers**

Yeah. Or we have to add an extra flag there, like an extra, like a Boolean field for lifetime. I don't know.

know. I don't know. Is that right? I don't know how to design the plug-in system, I guess, and not have certain fields there like this, right?

Because the other thing is we need to be able to – I don't want it to be CPU-intensive to find out if they're still a member, right?

In order to find out if they're still a member, I don't want it to be like making a request out to some sort of API, unless it gives you back a fixed date as opposed to just saying whether you're currently a member or not.

I'm just trying to – like we want to be able to provide additional access control based off of membership, and I believe the best way to do that or the biggest bang for our buck would be be integrate with the authorization framework.

Yeah. So, right, a membership would be a provider in that context, and then that could map to either –

Roles, or also group memberships, or somebody could write a plug-in and it could do other stuff, but I don't really know what we would have beyond group membership and role membership in Drupal right now, right?

Maybe organic groups could be another one, but that's still basically groups.

- **Luke McCormick (kiza.com)**

Yeah, yeah, yeah, yeah. I mean, there's a time component in there somehow, right? Like, saying whether somebody's in membership or not, that's kind of implicit, like, you know, meaning right now, but really, you want to know, you want that time dimension to be something that you can query somehow.

You want to know if they're a member now, if they're a member in the past, if they're a member two weeks from now in the future.

@23:53 - **steven.ayers**

So, right, content has moderation, content moderation for workflows. So, So, So, right. We would want to have something similar to that for membership, but certainly not the same thing.

There wouldn't be a draft membership, but questions you might have as far as is there a grace period for your membership, right?

If you were a member yesterday, even though your membership has expired, are you still considered a member for another week?

I don't know, right? I'm just throwing, like CiviCRM gives you similar options to that as well as determining how many days that like a membership would still be considered good after it expires or if it would be considered good.

And those would correspond to like different states. So, I don't know, maybe that's a little too much for just this one issue, but if somebody's interested in taking...

Taking this one on and creating a new module, I would certainly participate, but I would not be looking to be the lead on this feature right now.

@25:18 - **Bhavin Joshi**

I'm just curious about one field in this table, fixed and start, which says if fixed, when does the membership start?

They only might start on January 1. So what if a user joins a mid-year and opt for a yearly membership?

@25:37 - **steven.ayers**

So if they join for like a year membership and...

- **Bhavin Joshi**

Mid-year, let's say the 2nd February or 5th May or let's say even November 16th.

- **steven.ayers**

So like with November 16th, for example, right, some of the other things that we want to include is how many, what time period before the membership starts?

imagine that. I So like in your example, how many days or months at the end of, would your membership actually count for the next year, right?

So that would be like a setting we would have. I'm not saying that we're copying Civi CRM verbatim from a code or database schema perspective, but we do want to adopt all of their features here.

And that's one of them. Yeah, there's a lot of stuff in here too, like renewing memberships, and it's a lot, I get it.

It's, I don't know if I would say it's half of the specification document, but if you really wanted to, I suppose you could fit about half of it into this.

So Luke, now that I've described it as such.

- **Luke McCormick (kiza.com)**

Assume you're eager to take this on? Well, I mean, yes and no. I mean, on the one hand, it's interesting.

It's interesting in the way that I've always been interested in things like this. Like, you know, I badly learned computer science, you know, decades ago.

And when I started, they, you know, I learned in Pascal in my intro classes. And Nicholas Virch, the designer of Pascal, his deal was he called programs, you separate them into data structures and algorithms.

And Pascal was, like, really into data structures as kind of a thing. And I've always been more about data structures.

There's then they've done about algorithms. So like, I, I love schemas. I love, um, class diagram or, you know, various data diagrams.

I'm super excited to learn mermaid. the call. Uh, that we just looked at. I like today I'm going to start like, you know, my, my road is an expert, expert mermader.

Um, there's a live preview tool on their website. Oh yeah.

- **steven.ayers**

just type into a box and it starts generating it.

- **Luke McCormick (kiza.com)**

So. No way. Is it called mermaid? Yeah, there it is. Mermaid chart.

- **steven.ayers**

The mermaid playground or playground, I think is right up at the top menu there.

- **Luke McCormick (kiza.com)**

Yeah. Look at that. All right. Well, so, so, you know, I, I am dramatically, everyone knows me, JD, poor JD, like, like knows that I'm dramatically over, subscribed.

ACTION ITEM: Create mermaid diagrams for CRM data structures; update JD's existing ERDs - WATCH

I, I, We commit to, like, 10 times as many things I could possibly do. So I might as well throw onto that useless list.

Doing our diagrams, right? It sounds like we could use mermaid diagrams for, like, the data structures we actually have.

- **steven.ayers**

Yeah, that's what JD was trying for in, right, that issue that needs review about documenting the CRM architecture.

- **Luke McCormick (kiza.com)**

That's what that's about, huh?

- **steven.ayers**

Yeah, it's certainly not accurate anymore, but there's also one there about the previews, but.

- **Luke McCormick (kiza.com)**

Do you what it's called?

- **steven.ayers**

JD worked on that, I think, for membership platform, so.

- **Luke McCormick (kiza.com)**

Do you know what it's called? I'll click it up on the share here.

- **steven.ayers**

I mean, it would have been part of, like, the CICD pipeline.

- **Luke McCormick (kiza.com)**

Really? Thank you.

- **steven.ayers**

I'll Yeah, because, like, during the build process, you want to compile these for – the issue is that if you do it for every pull request, it's currently pushing it to production because the job is uniquely named in GitLab.

So it doesn't really matter what language you're using or what project you have. This is not it, but the pipeline has it on.

- **Luke McCormick (kiza.com)**

Like, if you have a pipeline for this project, you can – How do I do that? Why do click on to share that to our screen?

- **steven.ayers**

You can go to the source code, which is, right, a link's on the homepage to member platform. I have the member platform link there and then source code on the right-hand side here.

And then there's a .gitlab.com. CI. And there's an NK Docs, right, as the name of the job there is the first one.

And it's doing stuff, it's doing stuff. Here, though, they named the job Pages, which is, I guess, how they're publishing it or something.

I don't know.

- **Luke McCormick (kiza.com)**

Yeah, totally lost. I thought we were going to look at some issue that would describe things we needed in a diagram.

And if we're anywhere near that, I don't see how.

- **steven.ayers**

Well, the one for having stuff in a diagram, I'll drop that link in the chat for you.

- **Luke McCormick (kiza.com)**

Oh, yeah. All right.

- **steven.ayers**

All right. you. And this other one I'm dropping in there is J.D. working on having the GitLab Pages build as part of the merge request process.

So as opposed to, so when you set up a merge request, it will also make a preview of the pages.

And why that's related to the documents or the charts or the diagrams, because we can then review the documentation and the ERP diagrams before merging it in, like through Drupal.org and GitLab, not requiring you to download that branch and build locally.

- **Luke McCormick (kiza.com)**

It sounded like it made sense to somebody that understood that. I have no idea what you just said.

- **steven.ayers**

Fair enough. Next time you interact with JD, nag him to get this issue done.

- **Luke McCormick (kiza.com)**

Well, I want to make diagrams. I'm just looking to show me the data that's not diagrammed yet, and I will process it, and the output will be diagrams.

But what's the input for my diagram-making machine? What's the undiagrammed information?

- **steven.ayers**

These aren't really diagrammed yet, or at least he started that on this one. So if you were to look at the changes, there's a changes link there at the top.

- **Luke McCormick (kiza.com)**

A changes link at the top.

- **steven.ayers**

Right here by the branch. Yeah, where it has 33 draft. Merge request 33 draft in the center content.

- **Luke McCormick (kiza.com)**

Over there.

- **steven.ayers**

Yeah, there's changes to the left of that, just, yeah. so if you open that in... Link, or this one, it will show you the changes between, right, the current dev branch and this one.

And so, right, this ERD mermaid file is, right, contact there is the entity, but, like, social web doesn't exist anymore, so.

- **Luke McCormick (kiza.com)**

Oh, here it is. So this, ERD mermaid is the current outdated diagram.

- **steven.ayers**

Yeah, yeah, it's the one that JD started that hasn't merged in.

- **Luke McCormick (kiza.com)**

Oh.

- **steven.ayers**

I mean, he's doing something over here below there with bundles, and I'm not exactly sure. I guess he's showing the fields.

- **Luke McCormick (kiza.com)**

Where do see bundles?

- **steven.ayers**

Over on the right here? No, no, below that. The next one down. No, in that file, but the next item down is contact individual.

Right, that's contact. And then there's another, yep, that's contact individual, right? That's a bundle, contact household's a bundle, organization's a bundle.

I don't know if there's still a UID on any of these in the diagrams, I suppose. We removed the UIDs.

- **Luke McCormick (kiza.com)**

I mean, if you haven't tasted that into the playground, you could see it rendered. You know, I just realized that.

Like, I'm looking at this thinking it's code, but this is actually the diagram itself, huh? In mermaid format?

- **steven.ayers**

Yep.

- **Luke McCormick (kiza.com)**

Oh, that's so cool. All right, where's my playground? All Wait.

- **steven.ayers**

Just the other tab right there, yeah.

- **Luke McCormick (kiza.com)**

Yeah, I clicked on wrong thing. All right, so maybe start a new diagram, so it's our classical, export, share, how do I just get an empty I think if click on the top left-hand side there next to that hamburger button, I think it might drop open, yeah, new diagram.

Wait, I was already there.

- **steven.ayers**

How do get the text? do I? Oh, edit code at the bottom, I think.

- **Luke McCormick (kiza.com)**

Way down there, got it. All right, so now I'll just paste this up in, and oh, look at that.

Holy crap. So cool. Oh, that's fantastic.

- **Bhavin Joshi**

You can also export diagrams through strings.

- **Luke McCormick (kiza.com)**

Yeah, yeah, yeah. To SVG and things and stuff. Oh, I am... like... Oh, that's happy with I've never seen this, but I'm going to use this like all day, every day for the rest of my life.

This is fantastic.

- **steven.ayers**

Yeah, I think I love the rest of my life, but today I'm going to use it.

- **Luke McCormick (kiza.com)**

I've got diagrams I needed to do, and this is the perfect answer for that, so I'm going to do this today.

- **steven.ayers**

I think it might be better if we broke this up. Just there's a lot going on, like maybe a page relationship and a page for contact, but I get what he's looking to like demonstrate here, but I'm just thinking how this isn't going to really scale as we introduce stuff.

- **Luke McCormick (kiza.com)**

I mean, this is getting close to as much information as you can like take as a chunk, so you'll need other diagrams that are like, reduce this to a single block if possible.

- **steven.ayers**

Yeah, this is, I believe this is. Class Diagram. Maybe I'm wrong.

- **Luke McCormick (kiza.com)**

No, I think you're right.

- **steven.ayers**

But like, I think a class diagram would work well for like a single entity, right? These are tables that correspond to the class.

These are all the properties. This is how it links. But there's also like an ERD where it's just pure some objects and they, you know, the relationship one you looked at earlier, right?

It's not the same visual, but it still has relationships. Right. So something like that to show how the entities link to other entities is kind of what I was thinking.

But I mean, do whatever you think is right, I guess is what I'm saying.

- **Luke McCormick (kiza.com)**

Well, I mean, do you, are there, are there SQL ERDs anywhere? Or is that, is that just showing my age?

- **steven.ayers**

code. Or if you install it, you would then have, I guess, you know, the tables there.

- **Luke McCormick (kiza.com)**

Yeah.

- **steven.ayers**

Source I mean, you could just take the table definitions from the database and feed it to AI and be like, generate me mermaid documents.

In fact, I would not rule out that that's what JD did.

- **Luke McCormick (kiza.com)**

Yeah, no, I've had great success doing stuff very much like that. So unless you tell me not to do that, that's probably what I'm going to do.

- **steven.ayers**

Here's a link to the entities and the source code.

- **Luke McCormick (kiza.com)**

Oh, yeah.

- **steven.ayers**

Oh, cool. I mean, there's clearly more of them in here than is documented. Contact detail as a folder or directory there has classes in it, but those aren't entities.

Those are bundles. All right, it's just inheriting from contact detail. Yeah, But somewhere we... We... We... Somewhere in one of these hooks, we swap stuff around so that the address bundle gets address contact detail because how it generates the label is different based off the bundle.

Like the telephone, email, or address one actually has like some code in it if you wanted to see what it's doing, but right, it's just letting each one of them have a...

...label without having to do if type equals else if, else if. And the telephone contact bundle, or the telephone bundle is the only one that has a telephone field, right?

@40:54 - **Luke McCormick (kiza.com)**

No, no, no, no, no.

@40:55 - **steven.ayers**

Is that the telephone field you're talking about?

@40:57 - **Luke McCormick (kiza.com)**

Yeah.

@41:00 - **steven.ayers**

That's Yeah, mean, it's just a field added to a bundle, right? But it's locked, so you can't delete it, so we know it's there.

@41:12 - **Luke McCormick (kiza.com)**

Does that create the telephone field?

@41:15 - **steven.ayers**

No. No, it already exists. All this is doing is the label function, right? It's just, what's the label of this entity?

There's not a label field in the database for this one because there isn't. I guess.

- **Luke McCormick (kiza.com)**

I mean, is there an object somewhere where this property is defined that I can look at?

- **steven.ayers**

That's kind of what I'm... That's a Drupal field. That's just the core telephone Drupal field type, right? Go into content types, add field to a node, select the telephone field, give it a name.

We selected telephone.

- **Luke McCormick (kiza.com)**

Okay. Okay. Oh. That was kind of mind-expanding there for a second. So how much of the data structure is, like, existing standard Drupal elements versus created from scratch?

Is all of it there? There's nothing that's not?

- **steven.ayers**

I don't know what you mean, like, from scratch. Like, if we go look at the contact entity type, right, it's just defining base fields.

- **Luke McCormick (kiza.com)**

And it's going to be one directory. In here?

- **steven.ayers**

Yeah, and then contact.php. So if we look in base fields, I think is the name of the method.

- **Luke McCormick (kiza.com)**

So if we look at the

- **steven.ayers**

Yeah, right here. So these are just defining Drupal fields. All right, we've got an issue in the backlog to get rid of the primary field.

That's probably not really necessary, and if we are going to use that, it should probably be an entity reference to a relationship and not another contact.

But, right, name is just the name of the entity, right? If you're a person, household, or organization, you still have this name field.

Right, it's just a string, nothing fancy with it. Emails, telephones, and addresses, right? These are all entity reference fields to those contact detail types, right?

And each one is a bundle. It's Nonon or. What? We? You All right, status is just a Boolean field and, you know, creating changes, timestamps.

There are some fields we add. Like, so there's an alias field. It's literally just a field, though. Plain text, unlimited cardality.

The person bundle has a full name field, right, that uses the name type of field. So you can have, like, a given name, a last name, that kind of stuff.

We added another field to the person for preferred name.

- **Luke McCormick (kiza.com)**

Oh, yeah, I don't have that discussion.

- **steven.ayers**

Yeah, it's part of how the name field lets you, I guess, lie about your name or use other name stuff in place of your legal name.

- **Luke McCormick (kiza.com)**

I wouldn't use a majority of, like, lie, but, yeah. I mean... mean... mean... mean... mean... I mean...

- **steven.ayers**

Um, right, organizations also have an alias field, but it's just a field that doesn't do anything special, but a household wouldn't need one of those, so it doesn't.

- **Luke McCormick (kiza.com)**

Unless you have a named household. But I don't want to scope creep now, so never mind. All right. Look, we've got nine minutes left in our meeting.

How do we want to wrap this up? Fascinating for me. I appreciate sort of the tutorial here. To give you a record, know, I said I received formal computer science education a few decades ago.

About 30 minutes after I graduated, somebody invented object-oriented programming, and so everything I knew was instantly outdated. you. And I've never actually caught up.

never actually understood objects the way everyone else does.

- **steven.ayers**

If you search for something on JavaScript about monads and gonads, I swear to you, it's not the thing with animals being gonads.

He will show you how function-orientated script corresponds to object-orientated. He doesn't use a language, per se, but he's the author of JavaScript, The Good Parts.

- **Luke McCormick (kiza.com)**

Okay. Yeah, yeah, yeah, yeah. Yeah. Interesting.

- **steven.ayers**

It's just kind of inverting a few things, but it's really the same code.

- **Luke McCormick (kiza.com)**

I mean, version. So literally the first day of my computer science education, they – Yeah. I remember on the screen, we looked at an article called, Go To Considered Harmful.

And, you know, the whole thing we were learning at that point was not to have programs like randomly jump places and have it so that it was all the structured thing.

And near as I can tell, modern computer programming has completely rejected all that. And now everything jumps randomly everywhere and nobody minds.

@47:29 - **steven.ayers**

And nobody bothers to document anything.

@47:31 - **Luke McCormick (kiza.com)**

Don't use Go To's. You know, if you look at a piece of code, you can't tell the context from that code because you don't know where you're being, you know, you can be called from anywhere.

So we're back to that, like, that original thing at the time when I learned they said it was considered harmful.

That's the world we are living now. Well, sorry, we're in this harmful world. sorry. No, it's And, you know, there's just so much stuff.

Yeah, even here, look at this code, right? Like, from look at this code, like, if you didn't already know who was calling this, is there any way you could tell from looking at this?

Like, looking from, like, line 284 to, say, like, 297? Well, go to line zero if you want. It won't be any better.

@48:24 - **steven.ayers**

I mean. I don't know. They always, this bit of code always exists inside the function called, you know, base field definitions or, yeah.

And these correspond to database schema. Although I suppose if it was, like, a NoSQL, like, Mongo solution, it would correspond to the document schema.

I don't know. I don't run Drupal on Mongo.

@48:58 - **Luke McCormick (kiza.com)**

Yeah. Anyway, I. I don't want to drag you into this someday, maybe. Not JD's call. I hijacked these enough as it is.

All right. So we have five minutes left. Shout out orders to the world.

@49:18 - **steven.ayers**

Steve, what do you want people to do for you? And if you want to take a look at some of these ERDs, right, you mentioned about updating the one JD has.

So that could be good because the other reason that one was being held off is because the diagrams weren't rendering before, but that's been resolved.

@49:38 - **Luke McCormick (kiza.com)**

Oh, all right.

@49:40 - **steven.ayers**

They only render, though, after they get deployed, right? So when you go to when you went to that link to see the relationship diagram, right, that's a mermaid diagram.

And it may have flashed for a second before you saw the image because that's the JavaScript rendering it on the page.

ACTION ITEM: Update membership feature request issue; provide better instructions; break down into smaller stories (e.g. entity creation, admin renewals, status tracking) - WATCH

@49:57 - **Luke McCormick (kiza.com)**

yeah. Right.

@49:58 - **steven.ayers**

yeah, Yeah. Um, I know the membership feature request is probably too big to be bitten off as is, so maybe I should update that one and provide better instructions and maybe whittle it down a little bit in scope.

So, right, proposed resolution, copy the features of Civi's CRM, right? Real simple, guys, right?

@50:33 - **Luke McCormick (kiza.com)**

Why isn't it done yet? Maybe we can use a little detail on that, huh? Well, maybe. So when you say, did you write this?

Yeah.

@50:49 - **steven.ayers**

Yeah, a while ago. mean, 2024.

@50:53 - **Luke McCormick (kiza.com)**

I don't I don't know. So, like what features do you have in mind?

@51:04 - **steven.ayers**

What were you thinking there? Oh, the whole feature set is what we're looking for. But this would probably be limited down to just creating the entity and probably ignore how we handle renewals at the moment.

Or at least limit it to, say, an admin performing the renewal process as opposed to having the member renew themselves.

We probably want to handle payment in a different story, right? That would be like integrating with commerce. At least that's what I assumed we were going to do.

Okay. All right. This would be a separate module, so. As far as, like, other stuff I mentioned, though, right, either CRM mailer or CRM email, naming stuff is hard, but something that will be responsible for sending emails would be, right, a separate project, not a separate project, but a separate module.

- **Luke McCormick (kiza.com)**

I had, like, this list of features of CiviCiri, remember.

- **steven.ayers**

Are any of those lies? Um, I guess integrating with WordPress and Joomla is, uh, not something we're looking to do.

Um, and the more I look at this, the more I feel like each one of these should be a separate story.

- **Luke McCormick (kiza.com)**

Probably.

- **steven.ayers**

Uh, like, integrating with, uh, contributions, that's probably not something we're going to be doing in this one since it handles payments.

Um, Um, I guess anything really here handling payments we're not going to handle in this one, but earlier I was talking about membership status tracking, right?

Is it active, expired, pending, or like a grace period? That's probably a separate workflow system or something. I'm still trying to figure out how we would handle that.

But I'm thinking it's just going to be a workflow. Relationship-based access, right? We talked about how we would handle, oh.

Yeah, we talked about that, how you can have a household be a member and then members of that household.

Okay.

- **Luke McCormick (kiza.com)**

Yeah. Yeah. Yeah. Yeah. Yeah.

@54:06 - **steven.ayers**

So the reporting and searching is probably out of scope just because I don't know what would be. I would want to know what the reports would need to be kind of thing, that probably seems like it might be a separate.

@54:26 - **Luke McCormick (kiza.com)**

Approach your pre-dead instead of saving it.

@54:39 - **steven.ayers**

Lee, did you want to add anything? I don't want to clear out, but you've been in the meeting and I just wanted to make sure you had an opportunity to ask questions or get something out of this.

Thank Okay.

@55:02 - **Luke McCormick (kiza.com)**

Anyway, we're over time, and we should probably shut it down.

@55:09 - **steven.ayers**

Yeah, I'm thinking so. Membership, sending emails, case management, those are the things we're looking forward to.

@55:19 - **Luke McCormick (kiza.com)**

Yeah. Steve, I got a lot out of this. I don't know if anyone else will, but I appreciate it.

@55:27 - **steven.ayers**

Thank you, Luke.

- **Lee Walker**

I was following along on and off and being called too often by clients. It always happens.

- **Luke McCormick (kiza.com)**

Multitasking. All right. See you all next time. See you in two weeks. See you guys. Bye-bye.