Minutes of Meeting

Date and Time	17 July 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Sangita • Vishesh • Akash • Kapil
Attendees (Client Side)
• Tom, Teresa, Randy, Matt

Agenda
• **Discussions on the following:** ○ Email Priority Discussion ○ Report Approval Process - Discussion ○ Report Approval and Workflow Notifications ○ Notification System for Pending Reports ○ SMS Notification Setup ○ SMS Service Setup and Billing ○ Report Approval and Sending Process ○ Activity Tracking and Analytics ○ Help and Support Section ○ Open Issues and Status Updates ○ User Tracking and Location Issues

The following things are discussed:

1. **Email Priority Discussion:**
    a. **Kuldeep**: Discussed the email priority shared by Teresa.
        i. **QuickBooks Integration**: Client display names have been

implemented on the site. QuickBooks customer mapping is functioning as expected.

   ii. **Report Approval Process**:
      1. Jaspreet shared documentation for review.
      2. **Key Points**:
         a. Separate permissions for the person who can approve/reject reports.
         b. Rejected reports will return to "My Reports" for agent resubmission.
         c. Accepted reports will be sent to client reports based on client settings.
      3. **Action Required**: Teresa to confirm approval of the process and suggest any modifications.

2. **Report Approval Process - Discussion:**
   a. **Teresa**: Raised a question regarding the labeling of reports after resubmission.
      i. **Kuldeep**: Confirmed that after resubmission, the label will change to "Approved."
      ii. **History Tracking**:
         1. **Teresa**: History tracking should be available on the admin side only, but not visible to the client.
         2. **Kuldeep**: Confirmed that history would only be accessible to admins.
      iii. **Permissions**:
         1. **Teresa**: No modifications required to the permissions; the current approach works.
         2. **Kuldeep**: Separate permissions will ensure that only authorized personnel can approve/reject reports.
3. **Report Approval and Workflow Notifications:**
   a. **Randy**: Raised a question about the ability to delegate report approval in case of vacations or unavailability.
      i. **Teresa**: Confirmed that the system could allow for permissions to be transferred if necessary.
      ii. **Kuldeep**: Suggested the use of notifications for pending reports.
4. **Notification System for Pending Reports:**
   a. **Teresa**: Suggested having notifications for pending reports after a specific period (e.g., 24 hours).
      i. **Kuldeep**: The system will check for pending reports and send notifications once a day (e.g., at 7 AM).
      ii. **Tom**: Agreed with a single daily notification, regardless of how many reports are pending.
      iii. **Teresa**: Agreed that daily notifications would be sufficient and that this should be implemented at 7 AM each day.
5. **SMS Notification Setup:**
   a. **Kuldeep**: Explained that the code for SMS notifications has been developed but is currently pending due to missing Trello credentials.
      i. **Teresa**: Requested clarification about setting up SMS notifications.
      ii. **Tom**: Requested that SMS notifications should be provided through Command Hub.

iii. **Kuldeep**: Confirmed that SMS notifications could be set up through Trello. However, the client must be asked if they want the SMS service, as it is a paid service.
iv. **Tom**: Proposed that Command Hub should manage SMS services and include the costs in client billing.

6. **SMS Service Setup and Billing:**
    a. **Kuldeep**: Clarified that if clients require SMS services, they could purchase them through the system. The service would be billed according to usage.
    b. **Tom**: Suggested having different SMS accounts for each company (e.g., Kaiser, Citywide) with individual usage tracking.
        i. **Kuldeep**: Confirmed that usage could be tracked per client, and each company could have its own number for SMS.
        ii. **Action**: Kuldeep to check with Twilio about supporting multiple numbers under a single API key and report findings by tomorrow.
7. **Report Approval and Sending Process:**
    a. **Filter for Report Status:**
    Kuldeep confirmed that the system will include a filter for reports based on three statuses: Pending, Rejected, and Accepted. This will allow users to filter reports based on approval status.
    b. **Approval vs Photo/Email Setting:**
    There will be an option in the **site settings** to control whether reports require approval before they are sent. If **approval is required**, only approved reports will be sent. If **approval is not required**, reports will be sent automatically at the scheduled time.
    c. **Customizing Approval Process:**
        i. Teresa raised a concern about companies wanting to manually send reports while still reviewing them first. Kuldeep confirmed that it will be possible to approve reports without automatically sending them. There will be checkboxes to configure report approval settings.
        ii. This will be a **site-level setting**, allowing flexibility for individual companies to customize this functionality.
    d. Rejection and Sending Back Reports for Revision:
    Teresa asked whether it would be possible to send a report back for revision even if it wasn't marked for approval. Kuldeep explained that if report approval isn't enabled, the option to send it back for revisions wouldn't be available. However, the admin can mark the report as unclear, and it will go back to the agent.
    e. History Log and Notifications:
    A history log for report approvals and rejections will be maintained. Additionally, both the agent and admin will receive notifications:
        i. **Agent Notification:** When a report is rejected, the agent will be notified.
        ii. **Admin Notification:** Admins will be notified when a report is still pending after a certain period.
8. **Activity Tracking and Analytics:**
    a. **Tracking Company and Client Activities:**
    Kuldeep confirmed that **activity tracking** will be implemented for both **company-side** and **client-side** analytics. This will include tracking of the number of tickets in different statuses (open, in-progress, resolved, closed).

b. **Ticket Analytics:**
Teresa requested the ability to track the number of **days a ticket has been open** in the analytics dashboard. Kuldeep confirmed that this feature will be added, providing insight into how long tickets have been open, enabling better tracking of overdue tasks.

9. **Help and Support Section:**
   a. **Ticket Closure After 24 Hours:**
   Kuldeep confirmed that tickets will be automatically marked as "completed" after **72 hours** if no activity is logged on them. Tom Tamar requested the extension of the window from 24 hours to 72 hours, which Kuldeep confirmed would be implemented.
   b. **Ticket Reassigning:**
   Teresa requested the ability for admins to **reassign tickets** to other individuals. Kuldeep confirmed that this functionality will be available, and the reassignment history will be visible.
   c. **Role of CC (Carbon Copy) Person in Help and Support Tickets:**
   Kuldeep clarified the role of the **CC person** in help and support tickets. This individual will receive initial notifications about the ticket. If the assigned agent is unable to resolve the issue, the CC person will be able to intervene and provide a solution.
      i. CC persons will receive **notification updates** but not every status change.
      ii. Teresa confirmed that this setup is understood and will be used in the **help and support flow**.
   d. Forms and Notifications: Kuldeep outlined how forms would be set up:
      i. Forms will be **predefined templates** for help and support requests.
      ii. The admin can assign specific agents to resolve certain requests and specify who will be notified.
      iii. Teresa clarified that **supervisors** and **department heads** (rather than shift leads) should be responsible for reviewing forms like harassment claims and time-off requests.
   e. Other Updates:
      i. **Ticket Resolution History:**
      When tickets are reassigned (e.g., from Teresa to Tanya), a **history of ticket reassignments** will be maintained and visible to the agents. Teresa confirmed that agents should have visibility into ticket reassignments, as this provides clarity on the ticket's status.
      ii. **Form Section - Mandatory vs Optional Fields:**
      Kuldeep confirmed that the field for assigning a **supervisor or higher authority** in the form section will be **optional**. If no supervisor is assigned, the system will default to **global notification settings** based on the form's type (e.g., harassment).
      iii. **Flagging Unresolved Tickets:**
      A flag will be set for **unresolved tickets** that remain open for a certain period. This feature is being added to ensure that tickets do not remain open indefinitely without action.

10. **Open Issues and Status Updates:**
   a. Ticket Overflow and Analytics:
      i. **Teresa** inquired if unresolved issues would overflow to another

person automatically and how this would be reflected in the analytics. **Tom** confirmed that this will likely be clearer once the system is used in real scenarios.

ii. **Teresa** emphasized the need for analytics to identify and notify the person responsible for unresolved issues.

b. Development and Build Updates:

i. **Kuldeep** provided a status update on development:

1. DB schemas have been created and work on the requested features is underway.
2. The team plans to push the mobile site updates by Saturday, July 19th, and will share the related tickets and modules via email today.
3. Feedback and approval are needed on a few tickets, including adjustments to the OpenShift flag.
4. The next build, including feedback, will be pushed by Wednesday next week.

c. Report Creation on Mobile Site:

i. **Teresa** pointed out that when creating a report on the mobile site, certain reports were blank. **Kuldeep** confirmed that this would be addressed with an update, ensuring that the pass-down details are included in the report.

11. User Tracking and Location Issues

a. Tracking User Activity and Location:

i. **Tom** expressed concerns about the accuracy of asset tracking. He raised issues with the system showing outdated or incomplete information for patrol agents and field workers.

1. He stressed that it was frustrating that the location of assets was not updating correctly and was not reflecting the actual movements.
2. **Kuldeep** explained that if the location tracking was disabled on the browser, the system would not capture the location properly.
3. **Teresa** pointed out the need to differentiate between live location and last known activity in the app version, as the app should track locations continuously.

b. Mobile App and Web App Location Settings:

i. **Teresa** clarified that the app would capture the location continuously, even if users do not log reports. The location tracking is active by default in the app, while it is dependent on browser location settings in the web version.

ii. **Tom** requested a feature to ensure that if patrol officers log into the app or web, their location is captured with an automatic “arrived” action whenever they visit a new site, ensuring the system records the movement.

c. User Tracking Visibility and Reporting:

i. **Tom** raised concerns about missing tracking data for certain users in the system (e.g., 13 recorded activities but no visible tracking points).

ii. **Kuldeep** acknowledged the issue and noted that if the browser location was not allowed, tracking would not work correctly.

iii. **Tom** emphasized that accurate user tracking is critical and reiterated that the tracking feature should show the employee's movement and activities in real-time.