

## Minutes of Meeting

Date and Time	13 August 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

### Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Sangita
- Vishesh
- Akash
- Ravinder
- Amit
- Gurpreet
- Kapil
- Ajay

### Attendees (Client Side )

- Tom, Teresa, Matt

## Agenda

- **Discussions on the following:**
  - PSSP Priority Tickets
  - QuickBooks Payroll Integration
  - Bug Reporting Process
  - Feature Release Strategy
  - Immediate Release Planning
  - CityWide Features & Instance Update Consistency
  - Update Timing & Coordination
  - PSSP Scheduling Enhancements
  - UI Adjustments
  - Site Redirection & Navigation
  - Mass Mail Feature
  - Client Mass Email Filters
  - Scheduled Hours Report
  - Staffing Hours Data
  - Duplicate Assignment Concern
  - Role-Based Shift Login
  - QuickBooks Payroll Integration

- Priority Discussion
- Team Resource and Task Allocation
- Staging and Development Process
- Better Communication for Setting Priorities
- Setting Up Two-Week Release Plan
- Challenges in Task Completion
- Geofencing
- New Project Discussion
- Team Availability & Weekly Report
- Email Management
- General Communication
- Upcoming Feature Presentation

**The following things are discussed:**

**1. PSSP Priority Tickets:**

**a. Status Update:**

- i. The team is focusing on ~10–11 high-priority tickets for PSSP, identified with Teresa.
- ii. These items are essential for client workflows and must be completed **this week**.

**b. Progress:** Kuldeep showcased progress on the PSSP side during the call.

**c. Bugs:**

- i. Not part of today's main discussion, but any urgent bugs from CityWide remain a **parallel priority**.
- ii. Emergency issues will be addressed immediately.

**2. QuickBooks Payroll Integration:**

**a. Discussion:**

- i. Covered how QuickBooks Payroll will integrate with the platform.
- ii. Defined data points to be stored and communication flow between systems.
- iii. A pending sheet with priorities will be finalized after PSSP items are complete.

**3. Bug Reporting Process**

**a. Issue:**

- i. Nidhi flagged that tracking bugs via **Slack** is inefficient; tickets often get lost.

**b. Agreed Process:**

- i. **Urgent issues:** Post on Slack **and** log in **Trello**.
- ii. **Non-urgent issues:** Log directly into Trello.
- iii. Dev team is responsible for converting any urgent Slack reports into Trello tickets for tracking.

**c. Purpose:**

- i. Ensures no issue is missed and maintains a centralized tracking system.

**4. Feature Release Strategy**

**a. Current Gaps:**

- i. Features deployed to CityWide are not always released to other clients in a timely manner.

**b. Agreed Process:**

- i. When a new feature/module is released to CityWide:
  1. Test on staging.
  2. Deploy to CityWide for live testing.
  3. **Create a follow-up ticket** in Trello with a **2-week reminder** to decide if the release goes to all clients.

**c. Action:** Jaspreet to review pending CityWide features and identify what can be rolled out to other clients.

**5. Immediate Release Planning**

**a. Weekend Release:**

- i. Target to release ~10–11 priority tickets over the weekend for PSSP launch readiness.

- b. **Dependencies:** Final approval needed for training module and ATS changes before releasing to other clients

## 6. CityWide Features & Instance Update Consistency

- a. Tom raised concern about **features exclusive to CityWide** that should not be pushed to other clients.
- b. Observation: Some bugs in the new police agency's instance were already fixed in CityWide but not reflected in their system.
- c. Root cause discussion:
  - i. Jaspreet clarified the **codebase is shared**, so code changes apply to all instances.
  - ii. **Database-level changes** must be applied individually per instance.
- d. Action: Confirm if the new agency's instance received the most updated version of the platform.

## 7. Update Timing & Coordination

- a. Tom requested updates be scheduled at a time with **least operational impact**.
- b. Teresa to contact Chief Mike for best timing — confirmed as **Sunday between 9 a.m. and 11 a.m. ET** (6 a.m. PT).
- c. QA testing and Teresa's approval required before build deployment.

## 8. PSSP Scheduling Enhancements

- a. Kuldeep demoed a **service type visibility toggle** for the scheduler.
- b. Planned **advanced filter option** to optimize scheduling screen space.

## 9. UI Adjustments

- a. **Import Schedule Button:**
  - i. Determined, unnecessary and confusing; to be removed.
  - ii. This will free up space on the scheduling screen.
- b. **Radio Call Address Auto-Population:**
  - i. When entering a radio, selecting a site will auto-fill the call address.
  - ii. Users can manually edit if needed.
- c. **Status Tab Columns:**
  - i. Beat number and name to be shown together in a single column (similar to site number + site name).
  - ii. Extra beat name/number column will be removed.

## 10. Site Redirection & Navigation:

- a. **Change:** Clicking on a site will now open in the same tab instead of a new tab.
- b. **Behavior:** A back button will redirect to the last visited page.
- c. **Discussion Points:**
  - i. Some workflows require multiple tabs for parallel work (multi-monitor setups).
  - ii. Suggestion: Add an option to open in a new window/tab without losing primary session focus (to avoid timeouts).
  - iii. Right-click "Open in New Tab" or "Open in New Window" to be enabled for desktop/laptop users.
  - iv. Mobile devices to retain single-tab behavior to avoid multiple windows overload.

## 11. Mass Mail Feature

- a. **Change:**
  - i. Clear the last text/content each time a new mass mail is composed.

- b. Enhancement Request:**
- i. Option to add **default letterhead** containing company logo and signature.
  - ii. Option for companies to personalize the default template.
  - iii. If default letterhead not used, email body remains blank for manual input.

## 12. Client Mass Email Filters

- a. New Filter Options:**
- i. Send to **All clients** (Active + Inactive)
  - ii. Send to **Active only**
  - iii. Send to **Inactive only**
- b. Purpose:** Marketing campaigns or targeted client communication.

## 13. Scheduled Hours Report

- a. Enhancement:** Checkbox to include **Scheduled Hours** in Payroll and Billing reports.
- b. Clarification:**
- i. Payroll: Based on scheduled shifts if selected; otherwise based on check-in hours.
  - ii. Billing: Pulls open shifts only based on site selection.
- c. Terminology Change:** "Scheduled Hours" to be renamed "**Projected Hours**" in both Payroll and Billing reports.

## 14. Staffing Hours Data:

- a. Status:** Layout finalized, API integration pending. Current staging data is static.

## 15. Duplicate Assignment Concern

- a. Clarification:**
- i. No actual duplicates found.
  - ii. Same assignment names but different timings led to confusion.
  - iii. Action: Teresa to inform concerned users about this clarification.

## 16. Role-Based Shift Login

- a. Enhancement:**
- i. Officers with multiple roles will have their role auto-switched to match the shift's assigned role upon start.
  - ii. Prevents missed reports due to incorrect role selection.

## 17. QuickBooks Payroll Integration:

- a. **Jaspreet Kaur** initiated the discussion on QuickBooks payroll integration. The goal was to understand the requirements for implementing payroll alongside QuickBooks.
- b. **Tom Tamar** mentioned that QuickBooks doesn't handle payroll directly but that external APIs would be required.
- c. **Matthew Gardner** raised the idea of involving an accountant or technical expert to assist with the integration.
- d. **Kuldeep** explained that they had already integrated QuickBooks APIs for invoicing but needed to figure out the specifics for payroll, including data storage and manipulation.
- e. **Tom Tamar** confirmed that the team should start by signing up for QuickBooks payroll and reach out to QuickBooks support for any missing information.

## 18. Priority Discussion:

- a. **Jaspreet Kaur** presented the priorities for the current tasks.
  - i. **Priority 1:** PSSP implementation (currently being worked on).
  - ii. **Priority 2:** Items related to PSSP that are part of ongoing work.
  - iii. **Priority 3:** Multiple tasks such as PTO, chat module, API with Indeed, inventory management, etc.
  - iv. **Priority 4:** Documenting callouts (for replacement of agents in case of scheduling conflicts).
  - v. **Priority 5:** Various other tasks, including quick action buttons, caller history, and admin site for dispatch.
- b. **Tom Tamar** clarified that the priority list is more about the order of tasks, not fixed priorities.

#### **19. Team Resource and Task Allocation:**

- a. **Tom Tamar** expressed confusion about who is working on what and the timelines for each task.
- b. **Jaspreet Kaur** clarified that the resources are being divided across multiple tasks based on priority. Developers are working on employee help and support, analytics, and fixing bugs.
- c. **Rupesh** emphasized that the team has been sharing weekly progress updates, but clearer communication is needed regarding task allocation and timelines.

#### **20. Staging and Development Process:**

- a. **Rupesh** provided an update on the PSSP implementation tickets, mentioning that 29 tickets had been identified, with some on production and others on staging.
- b. **Tom Tamar** pointed out that there is confusion regarding the status of these tickets and what has been completed so far.
- c. **Rupesh** assured that the remaining tickets will be completed in the current week and that testing will follow development.

#### **21. Better Communication for Setting Priorities:**

- a. **Tom Tamar** emphasized the need for clearer communication regarding timelines and task progress.
- b. **Rupesh** agreed that they need to set priorities for the next few weeks and communicate which tasks can be done in a given sprint.
- c. **CommandHub Solutions** suggested adopting a more flexible, sprint-based approach, where priorities are set weekly, and progress is reviewed regularly.

#### **22. Setting Up Two-Week Release Plan:**

- a. The team agreed to work on a two-week sprint-based release plan.
- b. The immediate plan will focus on completing the tasks in the current sprint, and priorities for the next two weeks will be set accordingly.
- c. **Jaspreet Kaur** proposed that timelines could be provided at the start of each sprint to ensure clarity and smooth execution.

#### **23. Challenges in Task Completion:**

- a. **Tom Tamar** expressed concerns over tasks like ERM that are still incomplete.
- b. **Rupesh** acknowledged the ongoing issues and reassured that the team will continue to work on these tasks.
- c. **Quick Access Buttons:** Tom noticed that the quick access buttons are missing. These were discussed last year, but are not yet implemented.
- d. **Auto 97 Feature:** The "auto 97" feature, where users would get automatic updates when arriving at a property, is not visible. However, this feature is

tied to **Geofencing**, which still needs to be implemented before proceeding.

#### **24. Geofencing**

- a. **Status:** Geofencing is a crucial part of the "auto 97" feature but is still pending.
- b. **Explanation:** Geofencing is not yet in place, and its size is currently impractical. The feature can't function optimally unless geofencing is implemented to enable data correlation when entering geofenced areas.

#### **25. New Project Discussion**

- a. **Tom's New Idea:** Tom discussed a new project idea that will be presented the next day.
- b. **Rupesh's Team Structure Update:** Two people (one backend, one frontend) are working on the production effects on Slack, and the help/support features are being worked on simultaneously.

#### **26. Team Availability & Weekly Report**

- a. **Team Structure Clarification:** Rupesh updated the team structure for ongoing tasks:
  - i. Backend and frontend teams are working on different features (e.g., PSSP, help and support).
  - ii. Some team members are dedicated to fixing bugs.
- b. **Tom's Request:** Tom requested a weekly update on team availability and task assignments. He needs to know who is available and when to plan future tasks effectively.
- c. **Action:** Rupesh will provide a weekly team availability report and share it with Teresa and Aryan.

#### **27. Email Management**

- a. **Tom's Email Preferences:** Tom mentioned that he is receiving too many general emails and prefers not to be included in non-urgent or "info-only" emails.
- b. **Action:** Organizer and team will ensure Tom only receives emails that require his direct input or attention. Teresa and Aryan will handle general communications.

#### **28. General Communication**

- a. **Emails and Meeting Minutes:** Tom prefers not to receive general meeting minutes or email updates unless action is required from his side.
- b. **Action:** Organizer confirmed that only crucial emails will be sent to Tom moving forward.

#### **29. Upcoming Feature Presentation**

- a. **New Features:** Tom is excited to share new features he wants added to the system the next day. The team is eager to hear these ideas.