Minutes of Meeting

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

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Gurpreet • Sangita • Vishesh • Akash • Neha • Avinash • Ajay
Attendees (Client Side)
• Tom, Teresa, Matt, Randy

Agenda
• **Discussions on the following:** ○ Invoices Demo ○ Weekly Cut Off Demo ○ Employee Data Upload (PTPS) Issues ○ Outstanding Ticket Discussion ○ Permissions Configuration Discussion ○ Client Email Delivery Issues ○ Request: Report Approval Workflow ○ Responding Agencies Demo

The following things are discussed:

1. **Invoices Demo:**
    a. **Dev Team Demonstrations:**
        i. The dev team demonstrated invoice listing per site with due dates, statuses, and payment modes.

    ii. Approved invoices trigger creation of customer and invoice records in QuickBooks if the customer does not already exist.
    iii. Payment recorded in CommandHub is reflected in QuickBooks via webhook

  b. **Modifications or fixes needed:**
    i. Tom requested confirmation that payments work both ways – recording a payment in either QuickBooks or CommandHub should reflect on the other side.
    ii. Issue Identified: Deleting a payment in QuickBooks does not currently update or remove the payment in CommandHub.
    iii. Tom and Teresa requested to test payment deletion and re-creation on both platforms.
    iv. Deletion was demonstrated but did not reflect in CommandHub, confirming the sync gap.

2. **Weekly Cut Off Demo:**
  a. **Dev Team Demonstrations:**
    i. The dev team explained current logic using the start and end date.
  b. **Modifications or fixes needed:**
    i. Overtime settings should be part of "Overtime Settings," not general settings like branch level settings.
    ii. System should support two modes:
      1. Shift-based Overtime – Overtime is counted for the entire shift if it spans the week boundary.
      2. Week-based Overtime – Overtime calculation cuts off at midnight of the weekend.
    iii. This setting will impact both overtime and double-time calculations.
    iv. Teresa confirmed the radio button approach suggested by the dev team, requesting two radio buttons under the "OT trigger" section:
      1. Shift-based
      2. Week-based
    v. Accurately handle shifts that span across weeks, based on selected mode.
    vi. Ensure this setting influences both overtime and double-time logic.
    vii. Add end time configuration for overtime cut-off, not just the date.

3. **Employee Data Upload (PTPS) Issues:**
  a. The dev team requested clarification regarding the problems faced during the upload of employee data.
  b. There was confusion due to inconsistent data in the upload, especially for:
    i. Addresses
    ii. Date of birth
    iii. Phone numbers
  c. The dev team explained that Google Address API is used to split addresses into multiple fields, but it is failing to correctly format/split certain inputs.
  d. Tom emphasized:
    i. Current address structure in the system is non-standard and confusing, especially for U.S. users.
    ii. Requested the address format follow U.S. conventions:
      1. Address Line 1: Street number + street name
      2. Address Line 2: Apartment/Suite number

        3. Followed by City, State, ZIP, Country
    e. The dev team acknowledged the inconsistency is likely due to the way dynamic forms are structured across databases for the address inputs.
4. **Outstanding Ticket Discussion:**
    a. Tom asked for the total number of open/pending tickets to which Teresa estimated there are 50 to 100 tickets.
    b. The dev team clarified that many tickets are for new features, not just defects.Team is currently working on a weekly execution strategy.Plans are in place to transition to bi-weekly sprints for smoother delivery.
    c. **Categorisation of the tickets:** Tom grouped the tickets into three priority categories:
        i. **Existing Client Issues (High Priority)**
            1. These are **urgent bugs or problems** affecting current clients.
            2. Many are **recurring issues** that appear in every new client instance.
        ii. **Pending Features (Overdue)**
            1. These features have been promised, advertised, or sold to clients but are still incomplete.
            2. Examples:
                a. **Automatic invoicing**
                b. **Mobile app**
                c. **Geo-fencing**
                d. **Geo-scanning**

        iii. **Client-Driven Enhancements (Competitive Necessity)**
            1. New features based on **client feedback and market need**.
            2. Competitors offer these, and clients expect them.
5. **Permissions Configuration Discussion:**
    a. The dev team brought up the previous discussion regarding permission settings:
        i. System-level
        ii. Instructor-level
        iii. Student-level
    b. These permission tiers are specifically related to the Training Module.
    c. The team was awaiting Randy's confirmation before proceeding with removal or changes to permission settings.
    d. Tom stated the decision had already been made in a prior call, and he had approved moving forward.
    e. He emphasized that the Training Module is not a priority at the moment and any further deliberation is unnecessary.
6. **Client Email Delivery Issues:**
    a. Teresa raised a concern regarding the emails are not being received for the site reports, but some of them got the emails.
    b. The dev team explained:
        i. Email Delivery Logic:
            1. If reports exist, emails are triggered.
            2. If one report is sent successfully, all others should be.
            3. SMTP settings are likely not configured correctly on the client side.These settings must be correctly set per client's

email provider (e.g., SendGrid, Outlook).

4. The team also suggested creating or sharing platform-specific guides for SMTP configuration if that can solve the problem because there are N numbers of platforms.
5. If clients cannot set it up, credentials can be shared with the Dev team for configuration.
6. At the end the conclusion after the sending the set emails from client's end is that It is **client-side email security** causing delivery failure, not system issues.

7. **Request: Report Approval Workflow:**
   a. Overview:
      i. Reports must be held in an approval queue.
      ii. A designated admin should be able to:
         1. Approve and send it to the client.
         2. Edit the report and send.
         3. Reject and send it back to the agent for corrections.
      iii. Agents should have a dashboard to view rejected reports and resubmit them.
      iv. The system should maintain an audit log showing actions taken (who approved, edited, rejected, etc.).
   b. Site-Level Toggle:
      i. A new setting is needed: Report Approval Required – Yes/No.
      ii. If Yes, reports follow the approval process.
      iii. If No, reports are sent automatically as usual.
   c. Tom Strongly opposed building this as a full feature, calling it an "unnecessary" and "cumbersome" workflow.
   d. Suggested Alternative: Tom wanted to explore a simplified workaround that delivers the same outcome without significant development complexity.
8. **Responding Agencies Demo:**
   a. The dev team demonstrated the responding agencies dropdown in the sites and can be mapped with the site from the site form.
   b. In the incident Reports, When selecting a **site**, associated **responding agency types** (like police, fire, ambulance) appear based on configuration.
   c. Users can then select from these pre-configured options or can type in the responding agencies as well.