Minutes of Meeting

Date and Time	29 October 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Ravinder • Ajay • Gurpreet • Pankaj • Akash
Attendees (Client Side)
• Tom, Teresa, Matt, Randy

Agenda
• **Discussions on the following:** ◦ Topic: Form Linking vs. Form Suggestion Flow ◦ Issue: Permissions & Access (Training & Visibility) ◦ Discussion: Branch-Level Permissions & Setup Issues ◦ Discussion: Call Notification Implementation ◦ Discussion: Shift Clock-In / Clock-Out Restriction Settings ◦ Discussion: Trello Ticket Prioritization & Next Sprint Planning ◦ Discussion: Attendance Module – Bulk Check-In / Check-Out Logic ◦ Time Zone Adjustment

The following things are discussed:

1. **Topic: Form Linking vs. Form Suggestion Flow:**
    a. **Discussion Summary:**
        i. The team sought clarification on two conflicting scenarios for **form linking** and **form redirection** logic.
        ii. Jaspreet outlined confusion between two approaches — one requiring a report save before redirecting to a form (Tom's version) and another allowing direct form access without saving the report (Teresa's version).
    b. **Clarifications from Client:**
        i. **Teresa** clarified that these are **two distinct functionalities**:
            1. **Form Linking:** When a form is to be *attached* to a report.
            2. **Form Instead of Report:** When a form replaces the need for a report.
        ii. For clarity, the system should handle both cases separately:
            1. **Scenario A – Form Linking:** Save report first → then redirect to the selected form → link the form with report.
            2. **Scenario B – Form Instead:** Redirect to the form directly (no report save).
    c. **UI/UX Requirement:**
        i. When a user selects an activity code associated with a form, display a **pop-up** with three options:
            1. "Link Form" → Saves report and redirects to form.
            2. "Do Form Instead" → Redirects directly to form without saving the report.
            3. "Cancel / Proceed with Report" → Continues without linking or redirecting.
2. **Issue: Permissions & Access (Training & Visibility)**
    a. **Discussion Summary:**
        i. **Tom** raised that he could not see the *training* and *Arizona* company modules.
        ii. **Kuldeep** confirmed the issue was identified and QA was instructed to re-verify user roles and permissions.
        iii. **Teresa** questioned why, if permissions were pushed to *Company Admin Role*, they were not propagating to all admins.
3. **Discussion: Branch-Level Permissions & Setup Issues**
    a. **Overview:**
        i. **Ravinder** tested a new instance (Jefferson) and identified multiple issues with **permissions, roles, and branch configuration**.
        ii. System behavior was inconsistent when limited permissions were assigned, especially during creation of new branches, sites, or service types.
    b. **Tom's Feedback:**
        i. The **branch setup architecture** is incorrect — corporate-level access is missing.
        ii. As a **Company Super Admin**, he should see all branches (San Diego, Arizona, Riverside, etc.) from a top-level dashboard, while individual branch logins should show their own data only.
        iii. Current **payroll and reporting modules** display mixed data across branches, which is incorrect.
        iv. Lack of proper testing and mapping is leading to repeated demo failures and client dissatisfaction.

c. **Ravinder's Response & Plan:**
    i. Acknowledged the issues and committed to:
        1. Testing each branch individually on staging.
        2. Preparing a **branch-level testing checklist** to capture and fix configuration errors.
        3. Ensuring **corporate vs. branch segregation** logic is implemented correctly.
        4. Assigning a dedicated developer post-testing to correct identified issues.

d. **Discussion: Default Data During New Branch Creation**
    i. When creating a new branch, certain **default configurations** (e.g., activity codes, service types, base permissions) should automatically populate.
    ii. This reduces repetitive setup work and prevents configuration errors.

e. **Discussion: Company Admin Role – Static Access**
    i. **Jaspreet** recalled an issue in V1 where changing permissions for one admin affected others.
    ii. Proposal: Introduce a **static, default Company Admin role** that has **full, immutable access** — unaffected by other permission changes.

f. **Testing and Timelines**
    i. Full **application-level testing** (including forms, permissions, branches) to be completed within **1 week**.
    ii. Checklist to be finalized for:
        1. Role & Permission testing
        2. Branch-level setup validation
        3. Corporate vs. branch segregation
        4. Default data setup during new branch creation

g. **Client Concerns & Feedback**
    i. **Tom** emphasized frustration with repeated issues and lack of testing before deployment.
    ii. Highlighted that demo failures impact sales and revenue.
    iii. Requested structured planning and completion of pending fixes before new developments.
    iv. Urged the team to **"fix it first, explain later"** and provide visible results in demos.

4. **Discussion: Call Notification Implementation:**

    a. **Overview:**
        i. **Jaspreet** presented a demo video showing the **call notification workflow**, where users receive call assignments with details such as site number, action code, location, and route.
        ii. The intended logic redirects users to the **call action page** upon selecting "En Route" or "Acknowledge."

    b. **Feedback & Clarifications:**
        i. **Tom** stated that pressing "En Route" should only mark the call as en route; **it should not redirect** the user to another page.
        ii. **Teresa** clarified that the "Arrive" notification is just a **one-time pop-up**, and users can either acknowledge, en route, or click the call number for more details — **no additional redirection needed**.
        iii. **Jaspreet** asked whether a feature for **"En Route All"** was needed; **Teresa** confirmed it should remain **one-by-one only**.

iv. **Randy** suggested having **separate pop-up windows for each call** instead of a combined one, allowing independent actions per call.
v. **Ravinder** explained the system already prioritizes calls, displaying **high-priority calls at the top** to prevent missing critical ones.
vi. **Teresa** agreed with the priority logic but requested the **pop-up size to be increased** or redesigned so that **all calls are visible at once without scrolling**.

5. **Discussion: Shift Clock-In / Clock-Out Restriction Settings**
   a. **Overview:**
      i. **Teresa** created a ticket for configuring **shift-based clock-in and clock-out restrictions**, allowing users to clock in or out only within defined time ranges (e.g., 15 minutes before or after the scheduled time).
      ii. **Jaspreet** demonstrated a setup example where a shift from 9 AM–6 PM restricts clock-in before 8:45 AM and after 6:15 PM.
   b. **Client Clarifications:**
      i. Teresa:
         1. Employees **can log in** to the system anytime, but **cannot clock in** before the allowed time window.
         2. Two separate radio buttons are required — one to restrict **clock-in** and another for **clock-out**, so companies can customize based on policy.
         3. For their organization, only **clock-in** will be restricted; **clock-out** will remain open.
      ii. **Tom** confirmed agreement: “Clocking out shouldn’t be restricted, clocking in should be.”
      iii. **Teresa** explained the reasoning:
         1. Prevents employees from working **before shift start** (unpaid/unbilled time).
         2. Up to **15 minutes early** is acceptable for preparation.
         3. Late arrivals will still be allowed to clock in, but tardiness will affect **KPI punctuality**.
   c. **Clarifications on KPI Impact:**
      i. **Jaspreet** asked if this affects **punctuality KPIs**.
      ii. **Teresa:**
         1. The **restriction setting itself** doesn’t affect KPIs — it only defines allowed clock-in time.
         2. **KPI punctuality** is calculated **based on actual shift start time vs. clock-in time**.
      iii. **Tom:** Confirmed that late clock-ins (after scheduled start) will negatively impact KPI scores.
   d. **KPI Frequency and Scoring**

        i. **Jaspreet** asked how KPI points (e.g., punctuality) should be calculated — daily, weekly, or monthly.
        ii. **Teresa** confirmed this should be **configurable** via company settings.
        iii. **Kuldeep** added that the **grading setup screen** already allows selection of the KPI evaluation interval (daily/weekly/monthly).
        iv. **Tom** reminded the team to verify that this functionality works as intended, as some KPI configurations may not apply properly in current builds.

6. **Discussion: Trello Ticket Prioritization & Next Sprint Planning**
    a. **Overview:**
        i. **Jaspreet** raised the need to finalize **priority levels** for upcoming Trello tickets to plan the next sprint.
        ii. **Teresa** mentioned she is still reviewing the list and will finalize the **priority order after assessing ticket impact**.
        iii. Jaspreet confirmed that an email was already shared summarizing ongoing and next week's tasks.
        iv. **PTO implementation** from client's side is still pending.
7. **Discussion: Attendance Module – Bulk Check-In / Check-Out Logic**
    a. **Overview:**
        i. **Akash** demonstrated the **attendance module** and asked for clarification on **status synchronization** between "Status" and "Attendance" modules.
        ii. **Teresa** confirmed both modules should **communicate bidirectionally**, meaning:
            1. Check-ins or check-outs from "Status" should reflect in "Attendance."
            2. Similarly, bulk updates in "Attendance" should update statuses.
    b. **Clarifications on Bulk Check-In/Out:**
        i. **Jaspreet:** Asked what happens if bulk check-out is applied to users who haven't checked in.
        ii. **Teresa:** Only users **already checked in** should be affected by bulk check-out. Others must be checked in manually first.
        iii. **Akash:** Explained that the **bulk break check-in/check-out** feature works only for employees who **completed their full shift**.
            1. A filter is available to view only "Completed Shifts" before performing bulk break updates.
        iv. **Teresa:** Approved the logic and confirmed it should go live with the **next build update (Thursday)**.
    c. **Additional Notes:**
        i. Teresa requested development support during the **next payroll closing (Nov 1)** to run **scripts that correct break entries** for all users, as missing breaks are preventing clock actions.

        ii. **Jaspreet** confirmed the team will assist and rerun the scripts.

8. **Time Zone Adjustment:**
    a. **Discussion:**
        i. Ravinder raised a concern regarding the upcoming time zone change.
        ii. Teresa confirmed that the time change will occur on **Sunday, November 2nd**, moving the clock back by one hour (from 10 AM to 9 AM).
        iii. The calendar invites will need adjustment accordingly.
    b. **Decision / Action Items:**
        i. Team to **update all calendar invites** to align with the new time zone.
        ii. The meeting will continue at **9 AM (US time)** after the adjustment.
        iii. Rupesh confirmed that the same adjustment will be made from their end.
9. **Analytics Module Update**
    a. **Discussion:**
        i. Tom emphasized the urgency of having a **fully functional analytics module** to support ongoing client demos and sales.
        ii. Jaspreet confirmed that **analytics development is completed** and currently in the testing **phase**.
        iii. The team aims to **demonstrate the module by tomorrow**.
        iv. Tom highlighted that **comparative and percentage-based insights** must be included for analytics to hold value.
        v. Jaspreet confirmed this approach has been implemented across **Courses, ATS, KPI, and other analytics sections**.
    b. **Key Points Discussed:**
        i. Analytics must show **comparisons (month-over-month, year-over-year)** and **percentage variations**.
        ii. Tom suggested referencing **QuickBooks-style reporting**, where filters allow users to compare data by **day, week, month, or year**.
        iii. Teresa supported this concept, emphasizing **trend visibility** through charts and breakdowns.
        iv. Jaspreet explained that:
            1. **Primary filters** will include *Yearly* selection.
            2. **Secondary filters** (Weekly, Monthly, Quarterly) will display detailed breakdowns.
            3. Users can compare **different years or periods** dynamically.
        v. Tom clarified that comparisons should **automatically adjust** based on the selected period (e.g., month-to-previous-month, year-to-previous-year).