Minutes of Meeting

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

Attendees (Internal)
- Rupesh   - Kuldeep   - Jaspreet   - Vishesh   - Ravinder   - Rahul   - Ajay   - Gurpreet   - Kapil
Attendees (Client Side)
Tom, Teresa, Matt

Agenda

- **Discussions on the following:**
  - Report form linking
  - Call History Implementation
  - QuickBooks Payroll Integration
  - PSSP Updates & Production Status
  - Employee–Site/Beat Assignment & History Management
  - Sprint Progress & Approvals
  - Call Handling Logic Issue
  - Mass Email Functionality
  - Pending Deliverables & Milestone Sheet
  - Training Module Update
  - CHS Admin Panel – Phase 1
  - Mailing Service (Mailtrap) Update

The following things are discussed:

1. **Report form linking**
    a. **Parking Citation & Form Linking**
        i. Parking citations should allow **linking with trespass notices and vehicle information**.
        ii. Option to populate vehicle information from **parking citations into field interview** forms.
        iii. **Teresa:** Linking is useful, but incident reports should be the **primary entry point**.
            1. Incident reports can spawn sub-forms (parking citation, trespass advisal, field interview).
            2. Reverse linking (citation → incident report) is not recommended.
        iv. **Decision:**
            1. **Incident Report** will act as the **parent form**, with parking citations, trespass advisals, and field interviews as **sub-forms**.
    b. **Trespass Notices & Incident Reports**
        i. Trespass advisal acts as an **escalation** from field interviews.
        ii. Trespass advisal suspects should be **populated under incident report suspects**.
        iii. A trespass advisal can lead to:
            1. An **incident report**
            2. A **parking citation**
        iv. **Decision:**
            1. Trespass advisal and parking citations can both be linked to incident reports.
            2. Incident reports should hold the **comprehensive data**; sub-forms are byproducts.
    c. **Form & Call/Report Connection**
        i. Forms must be **linked to both calls and reports**.
        ii. If a form is created within a report, it should **auto-pick the call ID & site**.
        iii. **Editable restrictions:**
            1. Call ID and Site **should not be editable** when form is created via a report.
            2. If created standalone (dropdown selection), validation must ensure site-call consistency.
        iv. **Decision:**
            1. Once saved, **Call ID and Site** remain fixed in forms created via reports.
            2. For standalone forms, call dropdown should **filter calls by site**.
    d. **Report Creation Flow**
        i. **Primary Unit vs. Backup Unit:** Both should be able to create forms.
        ii. **Open vs. Closed Calls:**
            1. Calls remain available for reporting until the report is

completed.
2. Even after a call is closed by dispatch, reports/forms can still be created until submitted.

iii. **Decision:**
1. Report list should show **all calls without completed reports** (even if closed in dispatch).

e. **System Behavior Clarifications**
   i. Incident report = **central hub**.
   ii. Sub-forms (trespass, citations, field interview) are **dependent on incident reports**.
   iii. Avoid duplication: **One incident report can spawn multiple sub-forms**, but not the other way around.

2. **Call History Implementation**
   a. **Status:** Implemented.
   b. Functionality:
      i. Shows **total call count** for a number.
      ii. Clicking the count opens a **new page listing all related calls**.
      iii. Site-based search is supported.
      iv. Sorting functionality is active.
   c. **Feedback(Teresa):**
      i. Columns should be smaller, with **description column enlarged** for better readability.
      ii. Replace **"Updated At"** with **"Created At"** to reflect original call time.
   d. **Enhancement:**
      i. Calls should be **viewable with direct links** to reports.
   e. **Decision:** Adjust columns and timestamps, ensure calls link to detailed reports.

3. **QuickBooks Payroll Integration**
   a. **Findings:**
      i. QuickBooks APIs only allow **employee creation & updates** (basic info: name, email, phone, DOB, hire date, employee ID).
      ii. Payroll-specific details (pay rates, schedules, billing) must be added **manually**.
      iii. No CSV upload option is available at present.
      iv. Payroll API access is **restricted to Gold/Platinum partners**.
   b. **Challenges:**
      i. Current sandbox/test accounts do not provide payroll API access.
      ii. Requires **real Platinum/Gold QuickBooks account** for testing and integration.
   c. **Next Steps:**
      i. Teresa to confirm whether **PSSP or other clients have Platinum access**.
      ii. Explore manual workflows for payroll input (hours, pay rates) using exported CommandHub reports.
      iii. Kuldeep suggested possible **mapping/export solutions** for easing manual input.
   d. **Decision:** Proceed with R&D using Platinum accounts if available. For now, rely on manual input + employee sync.

4. **PSSP Updates & Production Status**
    a. Most **enhancements are already in production** across all clients.
    b. One feature in the testing **phase**, another under **R&D**.
    c. Noise notification feature still **in progress**.
    d. **Clarification:**
        i. Report creation is not **restricted to geofence** yet (only tracking entry/exit for now).
        ii. Request regarding restricting report creation within geofence **removed**.
    e. PSSP request list is **reducing**, showing progress.
    f. **Decision:** Continue updates, maintain shared PSSP update document.
    g. Client Communication & Billing
        i. **Invoices:** Sent but **not yet paid** by PSSP.
        ii. **Discussion:**
            1. Tom suggested enforcing **automatic monthly withdrawals** to ensure timely payments.
            2. Teresa to send a **reminder email** to PSSP.
        iii. **Decision:** Stronger follow-up on payments required.
5. **Employee–Site/Beat Assignment & History Management**
    a. Requirement:
        i. Currently, sites/beats can be added under employee profiles.
        ii. Clients want the ability to **add employees directly under Sites/Beats** as well.
        iii. This will avoid the need to always go into an employee profile to assign them.
    b. Discussion on History Tracking:
        i. When removing a site/beat from an employee profile, the system already asks for a **removal reason**.
        ii. Similar history tracking is requested when removing employees from sites/beats.
        iii. **Jaspreet's Query:** Should it be a common reason box for all removals or an individual reason box per employee?
        iv. **Teresa's Input:**
            1. Each removal should trigger an **individual reason box** tied to that employee's profile.
            2. Notes should reflect on the employee profile for documentation.
            3. Suggested possibility of a **blacklisted section** for employees removed under certain conditions.
        v. Tom's Input:
            1. **Additions** can be made from both employee profile and site/beat screens.
            2. **Removals** must be done only from the **employee profile** for proper HR/legal documentation.
            3. Removing from site/beat directly could cause compliance issues.
        vi. Decision:
            1. Employees can be added from both employee profile and site/beat views.

        2. Employees can only be removed via **employee profile** (with mandatory reason box).
        3. Blacklisting, if applied, should also be managed under the employee profile.

6. **Sprint Progress & Approvals**
    a. **Current Sprint:** Sprint 2 (not yet moved to Sprint 3).
    b. **Pending from Teresa:**
        i. Approval for Sprint deliverables shared today.
        ii. Invite for the EDP.
        iii. Review of shared document.
        iv. Approvals for implementations done so far.
    c. Kuldeep Update:
        i. A new **TestFlight build** has been sent for mobile app verification.
        ii. Awaiting Teresa's feedback on implemented changes.
        iii. Teresa to share a client **rates sheet**.
    d. **Decision:** Teresa to provide approvals and share pending document.
7. **Call Handling Logic Issue**
    a. Issue(Teresa):
        i. Available unit suggestion showing nearest by miles, instead of officers **logged into the site/route**.
        ii. Example: Officer showing as nearest (7.14 miles) but not logged into the actual site.
        iii. Risk: Dispatchers may assign calls to the wrong officer.
    b. Current Logic(Jaspreet):
        i. Employees highlighted based on **distance + assigned site/beat**.
        ii. Others not aligned show up lower in the list.
    c. Required Logic (Teresa):
        i. Only employees **logged into a site as stationary officer** OR
        ii. Employees logged into a **route that contains the site** should be considered.
    d. **Decision:** Update logic to prioritize only employees logged in to the specific site/route.
8. **Mass Email Functionality:**
    a. Current Status:
        i. Mass email tested and working.
        ii. Can send to **clients or employees** via filters.
        iii. Preview email option available but **not mandatory**.
        iv. Emails are processed via **background job** → UI shows "Mail Sent" immediately while emails queue in background.
    b. Issues/Concerns:
        i. **Tom:** Needs option to filter recipients:
            1. All active, all inactive, or specific selection.
        ii. **Duplicates Issue:** Managers with multiple properties create duplicate emails.
            1. **Solution (Organizer):** System will auto-filter duplicates so only unique emails are sent.
        iii. Recall Concern:
            1. Emails **cannot be recalled** once triggered, as data isn't stored.

9. **Pending Deliverables & Milestone Sheet**
    a. Team to review and provide updated milestone sheet with status by **next week**.
10. **Training Module Update**
    a. **Update (Akash):** Training module has been updated across all instances.
    b. **Discussion:**
        i. Question raised about ATS update for other instances.
        ii. Teresa requested to **hold off for a few more days** before ATS update.
    c. **Decision:**
        i. Delay ATS updates until Teresa provides confirmation.
11. **CHS Admin Panel – Phase 1**
    a. **Update:**
        i. Development of **CHS Admin Phase 1** completed.
        ii. A new server setup is required for hosting.
        iii. Email to be sent to Teresa and Aryan for approval and server setup request.
    b. **Domain Naming:**
        i. Proposed: `admin.commandhubsolutions.com`.
        ii. Tom confirmed this domain.
    c. **Server Setup:**
        i. Kuldeep to share server specifications, costs (monthly), and pricing details via email.
        ii. DevOps will handle setup post-approval.
        iii. Once approved, Kuldeep will share domain name and IP for Teresa to map.
    d. **Action Items:**
        i. Organizer to send email with pricing and server setup details.
        ii. After approval, proceed with CHS Admin server setup and domain mapping.
12. **Mailing Service (Mailtrap) Update**
    a. **Update by Kuldeep:**
        i. Mailtrap is set up for mailing services.
        ii. Current status shows emails in queue, with some sent and some failed.
        iii. Logs also track when emails are opened by recipients.
        iv. Further monitoring will continue, and updates will be shared.