Minutes of Meeting

Date and Time	20 May 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

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

Agenda
• **Discussions on the following:** ○ Trello Tickets Discussion ○ Invoice Workflow ○ Payroll Demonstration ○ Issues discussion

The following things are discussed:

1. **Trello Tickets Discussion:**
    a. **Meter Reading Implementation:**
        i. Meter reading is currently asset-specific.There is uncertainty about future requirements for instance-specific readings.
        ii. The dev team proposed a configurable setting to enable meter reading for instances if needed.
        iii. Teresa suggested keeping flexibility with labels to accommodate different data types (e.g., gas reading).
    b. **Form Charges Discussion:**

i. Teresa clarified that in the **trespass form**, charges are manually written in by security guards based on police input—no dropdown required.
ii. In the **field interview form**, dropdown options refer to potential crimes ("crime potentials"), not formal charges.
iii. Suggestion to include **Penal Codes** in dropdown for standardization.
iv. Teresa requested the ability to customize labels like "meter reading" or "violation" to match the organization's terminology or use case (e.g., "gas reading", "crime potentials").
v. **Parking Citations** will continue using the existing **violations section** and not be transitioned to activity codes.

c. **Activity Codes Integration:**
   i. Agreement to use **Activity Codes** in place of free-text charges and categories for:
      1. **Field Interviews**
      2. **Trespass Advisals**
      3. **Incident Reports**
   ii. Activity Codes will replace sections currently labeled as "charges", "crime potentials", or incident categorizations.
   iii. Drop-down fields for activity codes should allow **multiple selections (at least two)**.
   iv. Activity codes should be utilized in the backend for **reporting and analytics**, allowing categorization and trend analysis (e.g., frequency of specific incident types like "death", "property damage").

2. Invoice Workflow

a. Walkthrough of invoice approval, payment (partial/full), and method updates via CommandHub.

b. Demonstrated:
   i. Payment update with methods (e.g., Cash → Check)
   ii. Payment breakdown visibility
   iii. Deletion of partial payments and full invoices
   iv. Syncing and status updates between CommandHub and QuickBooks

c. **Enhancements Required**
   i. **Payment Method Field:** Should be selectable and recorded directly in CommandHub.
   ii. **Reference Number:** Should be included in CommandHub for reconciliation with QuickBooks.
   iii. **Default Payment Method:** Should be blank until selected by the user to avoid incorrect assumptions.
   iv. **Manual Handling of Credit:** Overpayments in QuickBooks should reflect as credits.
   v. Credit should not auto-apply to other invoices.
   vi. Users must manually choose to apply credit during payment for another invoice.

d. **Overpayment Scenario & Credit Tracking**
   i. The dev team highlighted system validation limits to prevent excess payment, but clients might still overpay.
   ii. Tom emphasized that overpayments are common and should be

stored as **client credit**, visible and reusable.

iii. Teresa added the credit should be linkable to future invoices, and **reconciliation should be accurate**.

e. **Client Financial Overview and Invoice Visibility**
    i. Teresa asked for a centralized view to see:
        1. All invoices by client
        2. Payment history
        3. Past due amounts
        4. Available credit
    ii. The dev team confirms
        1. A new **"Invoice" tab under client/site details** can be added to show all financial data.
        2. Existing invoice filters (by date, client, etc.) will remain.
        3. Authorized users only will be able to view or download invoices.

3. **Payroll Demonstration**
    a. **Allowance Calculation**
        i. **Clarification:**
            1. The dev team raised a question on how to handle allowance calculations for monthly salaried employees.
        ii. **Teresa clarified:**
            1. If the employee is salaried monthly, allowances are also monthly.
            2. Monthly allowances are automatically applied like hourly ones.
    b. **Sick Pay & PTO Rules**
        i. **Discussion**
            1. Sick hours don't apply to salaried employees.
            2. Hourly sick pay depends on state or company setting.
            3. Tom emphasized company-level rule definitions (e.g., “1 hour of sick pay for every 30 hours worked”).
            4. Cap limits are also needed (e.g., 45 hours/year).
            5. PTO and PSL follow the same logic.
        ii. **Action**
            1. Add settings to define:
                a. Earning rate for sick/PTO per hours worked.
                b. Annual caps.
            2. Implement logic to stop accrual after cap is reached.
    c. **Holiday Hours & E-Discrepancy**
        i. **Clarification**
            1. Holiday hours are added if employees work during holidays.
            2. E-Discrepancy is a manual adjustment field.
        ii. **Action**
            1. Continue treating E-Discrepancy as manual input.
            2. Add clarification in UI to distinguish it from calculated fields.
    d. **Allowance Display in Reports**
        i. **Discussion**
            1. The dev team asked whether to show all allowance types (with zero if not applicable) or only those assigned.

        2. Tom confirmed: **only show allowances linked to the employee**.
    ii. **Action**
        1. Ensure payroll CSV shows only relevant allowances per employee.

e. **Base Rate Calculation Across Pay Cycles**
    i. **Clarification**
        1. If employee is salaried
            a. Show weekly pay = monthly salary ÷ 4.285
            b. Bi-weekly = monthly ÷ 4.285 × 2
            c. Semi-monthly = monthly ÷ 2
        2. Employees must be flagged as either **hourly** or **salary**.
        3. Teresa suggested documenting the actual weekly/bi-weekly rate instead of calculating from monthly, to reduce complexity.
    ii. **Action**
        1. Add logic to compute correct base rates per pay period based on salary and pay type.
        2. Update UI to require either salary/hourly flag and base amount.

f. **Payroll Settings Visibility**
    i. **Discussion**
        1. The dev team noted the current UI only shows selected settings; wants visibility for all options.
        2. Tom confirmed: All settings are available, but only one is applied per company.
        3. No Action required.

g. **Commission Setup and Calculation**
    i. **Discussion**
        1. Two types:
            a. Flat commission in employee profile (e.g., monthly $)
            b. Site-based commission linked to service type & account manager.
    ii. **Clarification**
        1. Flat commissions should behave like salary (e.g., break down using pay period logic).
        2. Site-based commissions are dynamic: calculated on paid invoices and added to the next payroll.
    iii. **Action Items**
        1. Remove "percentage" as a commission type in flat commission UI.
        2. Implement automated site-based commission logic:
            a. Triggered on invoice payment.
            b. Calculated based on % per service type.
            c. Added to upcoming payroll.
        3. Tie site-based commission to account manager and service type.

h. **Next Steps & Build Prioritization**
    i. Current payroll release can proceed without full commission

automation.
   ii. Site-based commission logic to be prioritized in the **next build**.

4. **Issues discussion**
   a. **Slow Load Time**
      i. Tom complained about a 19-second load time – flagged as unacceptable.
      ii. Needs to be optimized immediately.
      iii. The dev team mentioned that the conversion for site is done. Once tested they'll update.
   b. **Confusing Terminology: "Agency Beat"**
      i. Tom questioned the term "agency beat."
      ii. Teresa confirmed it was a V1 label; it will be updated to "route" or "beat."
   c. **"No Data" Messaging**
      i. During data fetch, it says "No data found," which is misleading during demos.
      ii. Should instead show "Fetching data..." or similar.
      iii. The dev team confirmed the issue is known and a fix is in this build.
   d. **Navigation Issue After Error**
      i. Clicking "Go back" after a tracking error takes users to the main page instead of the previous (status) page.
      ii. Tom emphasized that this needs to return to the status page, not dashboard.
      iii. The dev team acknowledged and will reconfirm the behavior.
   e. **User Tracking Permissions**
      i. Super admins like Tom are getting permission errors when using user tracking.
      ii. The dev team said permission logic was updated, but the issue persists for some.
      iii. Needs to be verified and fixed for super admins.
   f. **Incorrect Tracking Display**
      i. Tracking sometimes displays all users instead of the selected one.
      ii. The dev team confirmed it's fixed on staging.