The Vision:

The main unique feature of iAutoM8 is using saved Formulas to make Projects happen automatically. Whereas most project management applications focus on creating a project from scratch (making a checklist, adding your files, manually assigning the people to the project or tasks, and typically reinventing the wheel each time), iAutoM8 is based on the idea of systems. Repeatable formulas/processes that get a result. In all businesses there are some tasks that are repeated. Either they are repeated for each client or sometimes for the business itself (reminder to do payroll/taxes, maintenance of equipment, opening/closing a store, etc.) Most project management applications or even small business applications have not tapped the desire of a small business owner to systemize that business. Ideally to make it run on its own, with less involvement from the owner than it does currently.

Therein lies the main desire of our user. To systemize. To automate. To delegate. And to set things up in such a way that this can keep itself ongoing. Where team members are reminded what to do, and even in our next phase to integrate with other apps/API's where other servers/services can be engaged at any point in our process, allowing for more automation and integration. Basic example: Gym owner has a task that runs Monday-Friday mornings to open the gym. A task could also be created to turn on all the lights for whoever opens the gym- and with future integrations, all lights could just be turned on automatically by us connecting with another app or server that runs their lighting. My vision is to create a platform that helps the small business owner to empower their team members and themselves by automating the minutiae. What can't be fully automated then becomes a formula that team members are assigned to. Things like creating a social media post, taking out the trash, etc. All of these can be set on schedules or applied to projects to happen when they should happen.

My vision is to empower thousands of small business owners and what's very cool about the idea of Formulas is many businesses share the same functions. Whether it's a gym owner or an internet marking agency, they may both need to do social media. The steps are the same for both of them. By sharing formulas with one another, we can grow a community of business owners sharing formulas they've created and also the ability for them to sell their formulas too. If someone has figured out the perfect Formula for how to do a social media post that gets engagement, they can sell or give that Formula to others, helping to quickly systemize another business. We predict a real "virality" among users once Formulas start being created and shared, especially within niches.

User Permissions:

Users should be assigned to roles which have defined permissions that control what users belonging to that role can/can't do and see. Example: A role called "Manager" may be able to create Projects from templated Formulas, add users to roles, but cannot delete Formulas. A role called "Owner" may be able to do everything in the app. A role called "Worker" may only be able to mark tasks complete and view tasks assigned to them.

Users and data should be separated logically according to the business entity they belong to, and users should never be able to access data the doesn't belong to the same business as them.

Users should be able to create, view, update, and delete formulas.

Users should be able to create, view, edit, and remove projects.

Users should be able to create empty projects from scratch.

Users should be able to create templated projects from formulas.

Users should be able to view schedules at the business, project, team, and user scope

Users should have permissions for accessing content at the task level.

Users should be able to view project generated resources (from themselves or others working on the same Project). Example: Task 1 is completing a spreadsheet. Task 2 may need that completed spreadsheet for the next user to do their work. The file will need to be shared from Task 1 for Task 2. This can be solved by adding files at the Task level (accessible only to those assigned to that task) or the Project level (everyone working on the Project sees it).

Users should be able to copy content from a Formula to a templated Project. Users should then be able to access or modify this content at the Project level without compromising the original Formula.

Tasks:

Users should be able to create, view, update, and delete tasks at the project and formula scope.

Users should have ability to have tasks occur on time intervals (every X # of minutes, hours, days, months, years)

Users should have ability to have tasks scheduled "one off" for a specific day and time at the Project level.

Users should have ability to set tasks to occur when one or more other tasks complete.

Users should have ability to be notified when a task that is assigned to them is ready to be started.

Users should be able to set the expected duration of a task.

Users should only see the task(s) they are assigned to.

Users should have the ability to see how long a task took to be completed.

Users should have the ability to see metrics on task completion times at the business, project, team, and user scope.

Tasks should have:

1. A name
2. A description
3. Handler(s) assigned to the task (individual users or Team)
4. A trigger that defines when the task should run
5. Alerts/Notifications (starting, started, completed, overdue)
6. Criteria (items that must be completed before this task can be completed)
7. Content (resources necessary for completing the task, i.e. files, videos, tutorials)

Teams:

A Team is an entity that represents a logical grouping of users. For example: Bill and Sue might be assigned to the Management team. Joe and Kevin could be assigned to the Cleaning team. Sue and Joe might also be assigned to the Baking team. The purpose of creating Teams is to allow tasks to be automatically assigned to a Team Member(s) when the Formula task lists that Team as the handler. Each task may have a different handler and by specifying the handler with each Formula task, work can be assigned automatically (instead of manually having to go in and assign a task to someone or some group each time that work is to be done in a Project).

Formulas:

All Formulas in a users account should be shown to them in a view:

Formulas

	Formulas Listing			+ New Formula

Page < 1 > of 5 | View 10 ▼ records | Found total 46 records

With Selected... ▼ ✔ Submit

	Record #	Name	Actions
☐			🔍 Search ✖ Reset
☐	23	GoogleMyBusiness Setup	🔍 View 🗑 Delete
☐	25	Local Citations	🔍 View 🗑 Delete
☐	33	Bing Places	🔍 View 🗑 Delete
☐	35	Rich Media Citations (Photos)	🔍 View 🗑 Delete
☐	38	Before Starting- Gather existing logins and business information	🔍 View 🗑 Delete
☐	41	Rewrite Business Description 10 Times	🔍 View 🗑 Delete
☐	42	Tumblr Method	🔍 View 🗑 Delete
☐	43	Blogs-Collection Directory Submission	🔍 View 🗑 Delete
☐	44	Add to Rank Tracker (SerpFox)	🔍 View 🗑 Delete
☐	45	Creating & Optimizing City Landing Page	🔍 View 🗑 Delete

Page < 1 > of 5 | View 10 ▼ records | Found total 46 records

Navigation sidebar:
- Search...
- Dashboard
- NAVIGATION
- Accounts
- Clients
- Members
- Projects
- Formulas
  - + Add New
  - ≡ Show Formulas
- Automation
- SETTINGS
- Personal Settings
- Client APP

A new Formula should be able to be created and named:

Add New Formula Step 1:

New Formula

Description *

Details

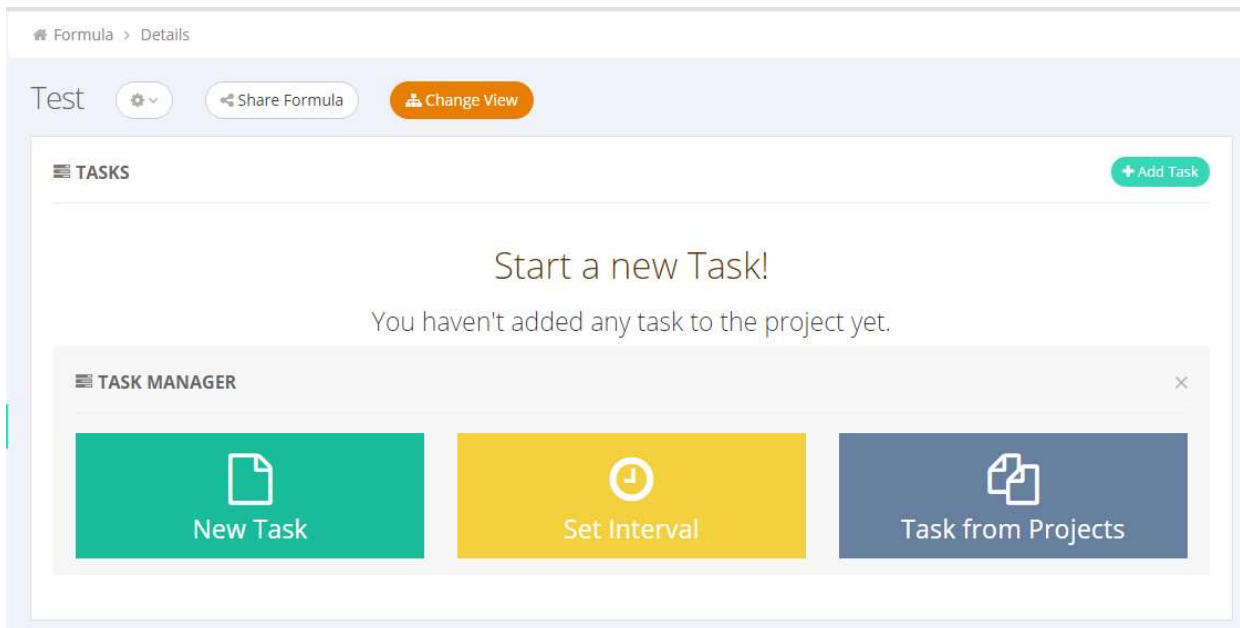Provide aditional notes for formula

Select project tasks to copy into formula
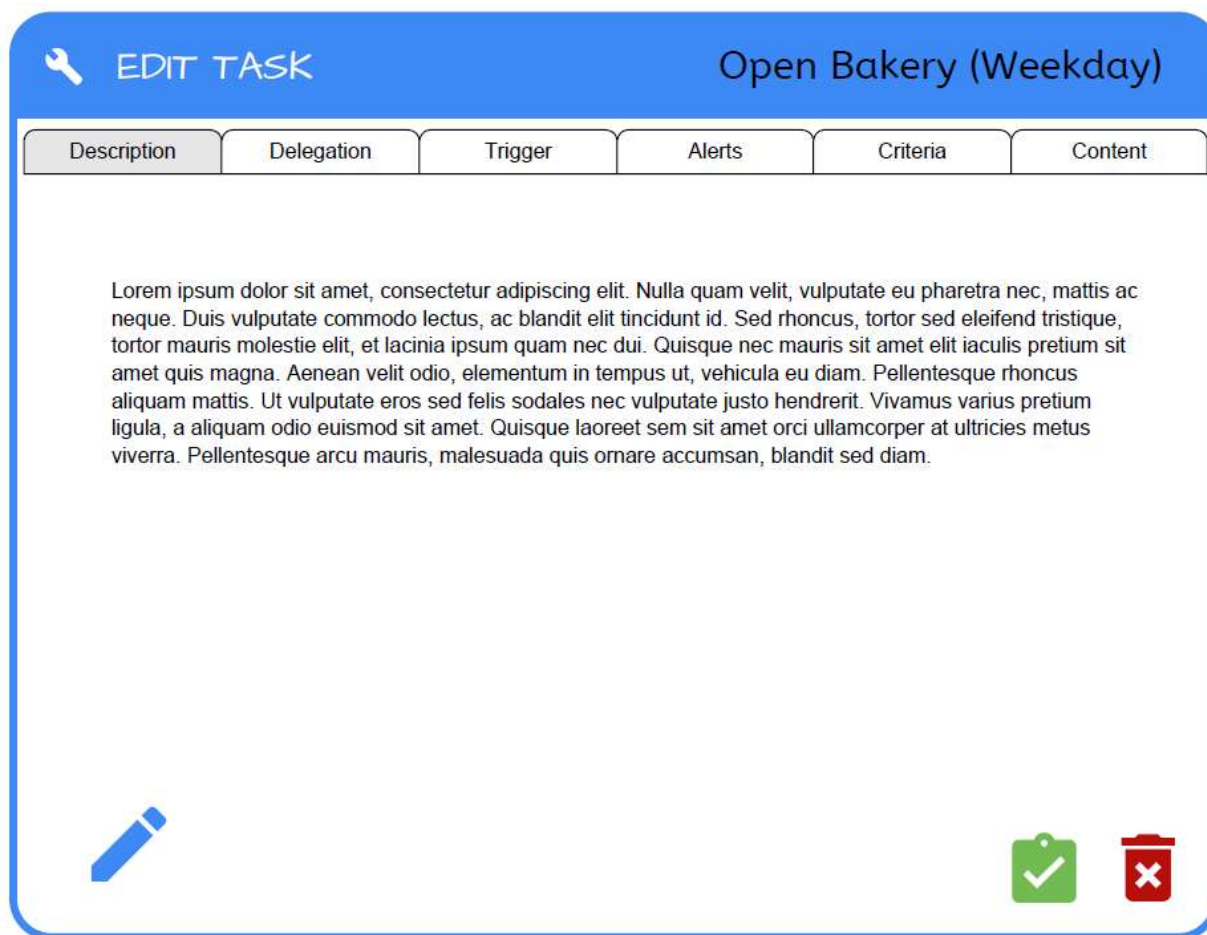
Select Tasks ▾

Submit   Close

Tasks should be able to be added to the Formula:

What a Formula task modal should look like:

Open Bakery (Weekday)

| Description | Delegation | Trigger | Alerts | Criteria | Content |

Joe

Sarah

Open Bakery (Weekday)

| Description | Delegation | Trigger | Alerts | Criteria | Content |

Regularly Scheduled

Open Bakery (Weekday)

| Description | Delegation | Trigger | Alerts | Criteria | Content |

Description	Delegation	Trigger	Alerts	Criteria	Content

☐ Child Tasks

☑ Clean Bakery

☑ Check Inventory

☐ Bake Pastries

☐ Prep Orders

☐ Unlock Doors

➕ ✓ ✗

Triggers:

A trigger is an event that causes a task to cue.

Triggers will come in the form of day and time based functions.

Regularly scheduled Triggers should be able to cue a task to run on one of the these or a combination of these:

1. By the minute
2. By the hour
3. By the day
4. By the week
5. By the month
6. By the year

Example: Run this task in 30 minutes. Task starts should be able to be a combination of these too, i.e. Run this task in 1 day 1 hour and 5 minutes.

Repeating Triggers should be able to cue a task to run repeatedly by any combination of the following:

DAY

Repeat Every X # of Days

WEEK

Repeat Every X # of Weeks "AND"

Select Day of the Week it Repeats on (M, T, W, Th, F, Sat, Sun)

(examples: Task could repeat every 2 weeks on a Tuesday

Task could repeat every 4 weeks on a Monday)

Example: Facebook post needs to be written by someone on the team each Monday at 9:00 a.m.

Also, we need a duration option for how long the task should take. Say this Facebook post takes 15 minutes to write. It should show that its then due at 9:15 a.m.

MONTH

Repeat Every X # of Months "AND"

Select Calendar Day of the Month it Repeats on "OR"

Select The 1st,2nd,3rd,4th Week of that Month and Day of the Week it Repeats on

(examples: Task could repeat on the 15th day of the month, every 2 months

Task could repeat every 3rd Friday of the month)- every 3 months

Repeats: monthly

Repeat every: 1 month

○ Day 1 of the month

⦿ The first - monday of the month

End recurrence: ⦿ Never

○ After occurence(s)

○ On yyyy-mm-dd

Cancel   Ok

YEAR

Repeat Every X # of Years "AND"

Select Month and Calendar Day It Repeats on "OR"

Select The 1st,2nd,3rd,4th Week of a Specific Month and Day of the Week it Repeats on

(examples: Task could repeat every year on January 1

Task could repeat every 3rd Monday of March every year)

Repeats: yearly

Repeat every: 1 year

○ Day january 1

⦿ The first - monday

of january

End recurrence: ⦿ Never

○ After occurence(s)

○ On yyyy-mm-dd

Cancel   Ok

And an selector of when to stop the repeating of the tasks.

Never Stop "Or" After X # of Occurrences. We don't need a fixed Date to stop on because all of these tasks will be created dynamically depending on a project's timeline.

TIME OF DAY

I'd also like to have time as a repeating option too.

So for each option, we can set the time of the day it would repeat at.

Example: Every 3rd Monday of the Month at 11:00 a.m., this task repeats.

Example: Repeat every Tuesday at 9:00 a.m.

DURATION

Users should be able to set Durations of how long a task should take in days, hours, minutes.

Example: Facebook post needs to be written by someone on the team each Monday at 9:00 a.m.

Say this Facebook post takes 15 minutes to write. It should show that its then due at 9:15 a.m.

INTERVAL

Users should be able to use a task as an interval between other tasks, effectively "pausing" in between tasks. Basically consider it a blank task. Example: Interval task runs for 3 days in between 2 other tasks, effectively "holding" that space until the time has elapsed and the next task can run. Likely this can be accomplished by just having a regular task for this, set with a Trigger for 3 days, with the handler as the system itself.

COMPLETION BEFORE THE NEXT TASK CAN START

As part of the Triggers section, there should be an option for users to check whether to start the next task(s) in the chain or to "hold" the task until it is marked completed. We should have 2 options: "autostart" next task(s) or to "hold" for completion before the system proceeds in the chain of tasks.

Creating a Workflow (chaining tasks)

Tasks should be able to be connected to each other, to branch and chain, meaning once a task is connected to one above it, it is dependent on that task now (only if its linked up). The task should be able to "wait" to start until the previous task is complete, or can start after a set amount of time, whether the previous task is completed or not. A series of tasks should be able to condense too. Example: 2 tasks can be running at the same time (creating a Youtube account and creating a video) and once both tasks are marked completed, the chain of tasks can condense into 1 task, which is to upload that video to the created Youtube channel.

Multiple tasks should be able to start at the same time, in any point of the chain. Meaning 3, 5, 10, or even more items could start at once if the user defined them all to start at the same time.

We will need a way for the user to connect the tasks together into a chain.

Previous efforts have resulted in the discovery of jointjs.com which gives a diagramming editor for users to connect tasks together.

The plan is for the user to use a visual interface like this to connect tasks together into a chain. When clicking a particular task, the modal would open with all of the task details.

We should also be able to create a task after any other task for "Manager review" or approval. Say a user(s) completes graphics for a Youtube Channel. A Manager may need to review that these graphics are appropriate before the user posts them on the Youtube Channel. Once the user marks their graphics task complete, another task could immediately start which notifies the Manager he/she needs to approve the work. If the work is satisfactory, the Manager can mark his/her task complete and then the next task could start which is for a user to post those graphics to the Youtube Channel. Should the work not be satisfactory, we need a way for the Manager to re-start or mark that previous task as incomplete so the user can be alerted to fix their work and then mark complete again- then the Manager would get their task restarted too to Approve the Work. So we need to have a loop like this.

Although not necessary for V1- we do want to make sure the system can handle the ability to repeat a chain of dependent tasks too. So rather than just 1 task repeating, it would be a whole series of tasks repeating. Example: Unlock the gym at 6:00 a.m. and once that task is complete, turn on the lights, and then start cleaning. Once the cleaning is complete, the gym can be open for business. So we'll need to make sure the system is designed to repeat a chain of tasks, complete with the dependencies along the way.

Another item not necessary for V1 but worth discussing is for dates to be able to be calculated in reverse. Say there was a New Years Eve party that was scheduled for December 31, 2017 at 10:00 p.m. Before this party could happen, many things would need to take place. 1 day prior, the facility would need to be cleaned. 1 month prior, a meeting with the caterer to discuss food options would need to take place. A few hours before the party, beverages would need to be brought to the facility.

So the system should be designed to support this future feature of calculating dates/times backwards as well as forwards.

How will you handle time zones for users and Daylight Savings time affecting the app?

Sharing:

Users should have the ability to share Formulas with users from other businesses (outside of their own organization)- this should be a permission setting for which users can share and which cannot.

Share Formula button:

Share Formula

Your Formula share link is:

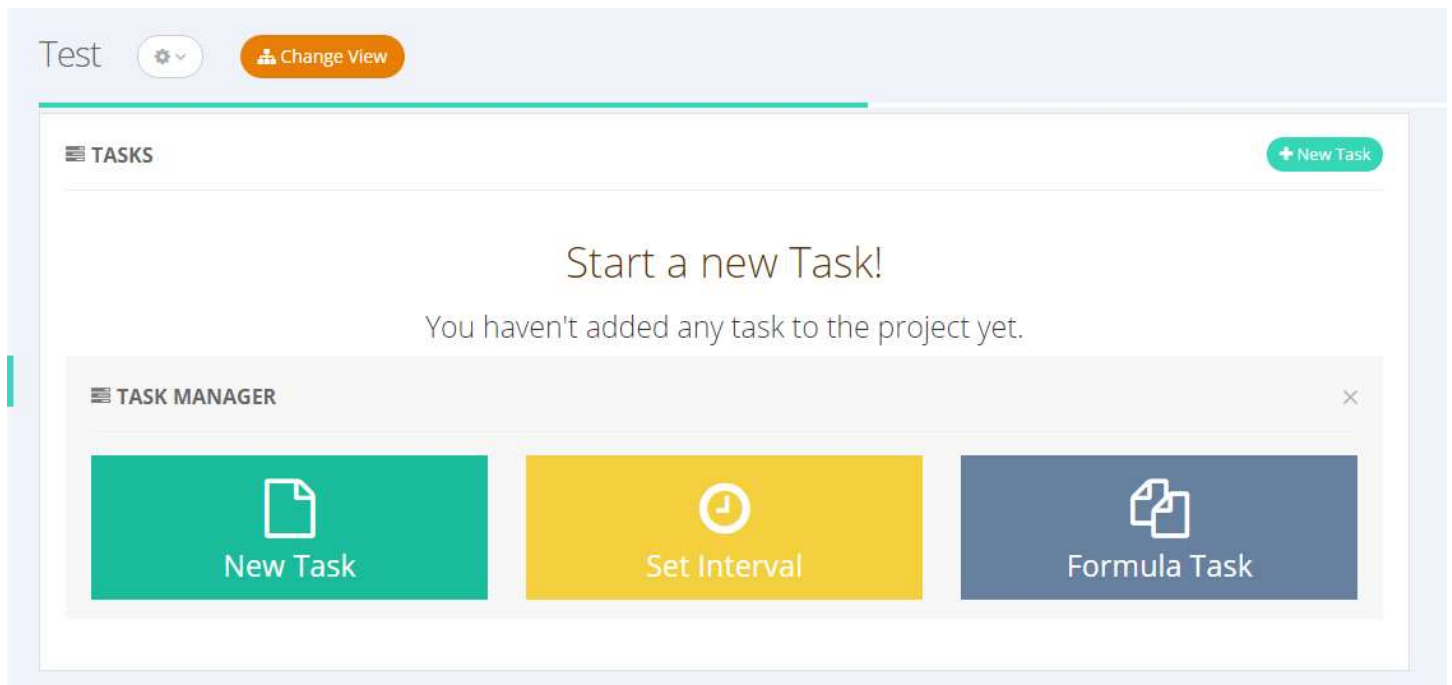**https://www.i-autom8.com/?cmd=copyRecipe.Load_8:0=3=133**

User gives link to another user, and the other user needs to be logged in and when clicking the link, that Formula is copied into his/her account (with the option to share files, members, etc.)

Projects: Think of the Projects section as the project management part of the app. It's where the team members are actually doing their work. This is where they are seeing the Formulas in action. The steps that are being applied, the work that is due for today, tomorrow, etc.

Projects can be created one time- like if someone just wants a to-do or is doing a one-time project or event that they may or may not use Formulas for. They have that flexibility. Creating tasks should have the same look and feel here as they do for Formulas. The only difference is a Project is 1 iteration whereas a Formula is a stored template.

In addition to the trigger options available in Formulas, users should be able to define an actual calendar date and time for a Project task.

Within a Project, templated tasks should be able to be added from a Formula. Here it is labeled "Formula Task"

Test ⚙ ▾ ⬡ Change View

☰ TASKS   ➕ New Task

Start a new Task!
You haven't added any task to the project yet.

☰ TASK MANAGER   ✕

| New Task | Set Interval | Formula Task |

A user should then be able to select from saved Formulas: (also can choose whether or not to copy Formula content and delegations, say a spreadsheet, graphic or team that would have been saved when Formula was created). This prevents

a user from sharing sensitive files or team member names but still allows that user to share the name, description, triggers, alerts, and criteria with another business' user.
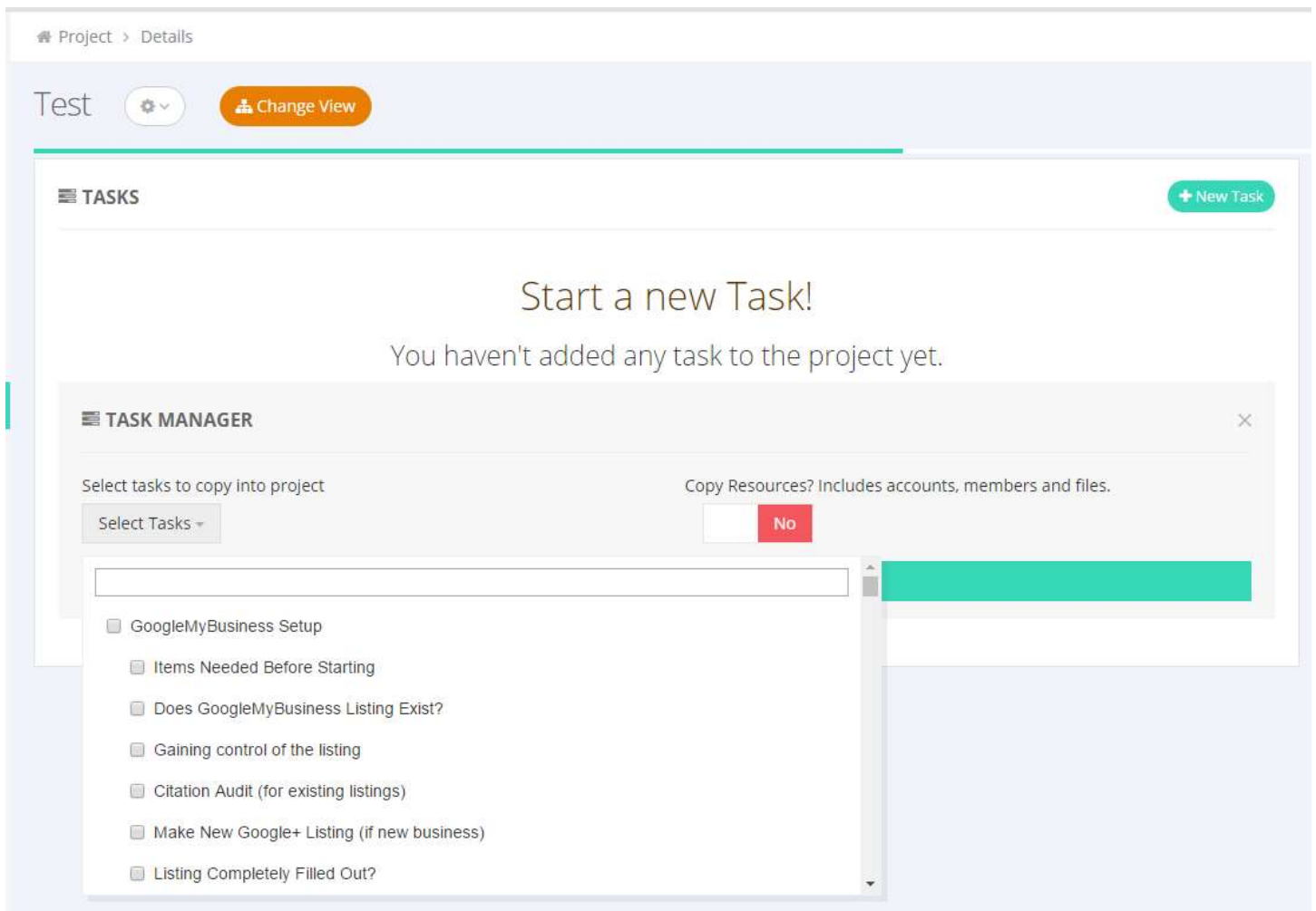
Then, user should see the Formula tasks created as Project tasks, including the schedule of tasks due with beginning/ending dates and times.

Schedule:

Users should have a calendar view and a list view of Today's tasks & Overdue tasks, and then calendar shows what is coming up. There needs to be a Daily Summary of what they're assigned to do today as well showing predictively what is coming up for them. Each task should have a predicted start/end time based on the system calculating when that task is scheduled to run. This will need to adjust based on any delays or accelerations in the previous tasks being completed.

We do need a way to track the start and end time of a task for future reporting purposes.

Projects Summary

📅 Today 23   👁 Supervision 134   ⚠ Overdue 203   📄 Tomorrow 0   💬 Comments 0

Page < 1 > of 3 | View 10 ▼ records | Found total 23 records

	#	Task	Project	Client	A
☐					
☐	1603	Submit To Directories	Directory Listings- Weekly Submission	Emergency Pest Control of Peekskill	
☐	1648	Submit 10 Directory Listings	Directory Listings- The Home Insulators of Bergen County	The Home Insulators	
☐	1705	Submit Directory Listings Weekly	Wade & Nysather Law Offices- Glendale	Wade & Nysather Law Offices	
☐	1710	Submit Directory Listings Weekly	Wade & Nysather Law Offices- Glendale	Wade & Nysather Law Offices	
☐	1720	Submit To Directories	Directory Listings- Weekly Submission	Emergency Pest Control of Peekskill	
☐	1721	Submit 10 Directory Links	Directory Listings Dripped	Injury Lawyers PLLC	
☐	1726	Test Daily Repeating	Test Daily Repeating	Personal	
☐	1759	Interval	Test Formula	Personal	
☐	1766	Record All Existing Social Properties and Logins	Test	Personal	
☐	1767	Create Or Gain Access to Master Gmail Account For The Business	Test	Personal	

Page < 1 > of 3 | View 10 ▼ records | Found total 23 records

List View

Monthly View

Notifications:

Users should receive notifications/alerts that are set at the task level. Example notifications include:

New Task Assigned To User

New Project Assigned To User

Task- Start Now (alert them that new task is starting that they need to do- Very important that we have this one)

Task- Deadline Approaching (alert them that task is about to become overdue- can we remind a certain amount of time before it is due?- Very important that we have this one)

Task- Overdue - Deadline has been missed- invite them to leave a status update (comment) about what is happening.

Task- Completed

Notifications should be able to be set to go to the user who created the task and user(s) responsible for completing the task. The system should allow for these notifications to be turned on/off by role. Example: A Manager doesn't need to get alerts for all of their workers that every individual task is starting.

A nice to have feature would be a daily summary of activity and a list of tasks that user needs to do.

Content:

Users need the ability to add files and media (videos, photos, PDFs, etc) to do their work. Refer to other parts of the requirements where files are required to be stored and given user permissions.

Files should be able to be added at the Task level (accessible only to those assigned to that task) or the Project level (everyone working on the Project sees it).

Clients:

Client Details

Information
Location
Projects
Sub Clients

First Name
Marc

Last Name
Last Name

Email
Email Address

Company / Organization
Freddy's Frozen Custard & Steakburgers

Office Phone #
Office Phone #

Mobile Phone #

Save Changes Close

Client Listing

Page < 1 > of 4 | View 10

Record # ▲	First Name			Actions
7	Brandon			Q View Delete
10	Carmelo			Q View Delete
11	Patrick			Q View Delete
12	Patrick			Q View Delete
13	Patrick	Harter	iFix iBuy	0
15	Marc	Zwygart	Copp Media	0
17	Marti	Mill	Magician Marti Mill	0
20	Dr. Jennifer	Moses	Naples Abundant Health Chiropractic	0
21	Marc		Freddy's Frozen Custard & Steakburgers	0
22	Larry Test		Vitamin C Serum	0

Page < 1 > of 4 | View 10 ▼ records | Found total 39 records

Dashboard list of all clients, can add a new client, client details can be viewed with some of their basic information. Clicking on Projects tab will show the Projects assigned to that client.

Additional points:

Security- what is needed to secure an app like this with all of the user data generated?

Hosting- Azure? Is this the best option?

User accounts- can we set how many additional users a purchaser can have on their account?

Subscription payments- integrating payment for purchasers to pay for their app. Controlling access with payment.