Group 1 – Meeting Minutes

**Date:** August 27, 2025  
**Time:** 9:00 AM  
**Location:** Dr. Voss’s Office

**Attendees**

* **Wyatt Morgan** – Project Manager / Developer
* **Owen Graham** – Documentation Handler / Developer
* **Corey Unruh** – Developer
* **Dr. Rob Voss** – Client / Stakeholder

**Meeting Agenda**

* Understand project vision and target audience
* Discuss desired features and priorities
* Set deployment goals and timeline
* Plan research and next steps
* Establish communication expectations

**Discussion Summary**

**Project Vision & Audience**

* **Target Audience:** CPAs, accounting firms, and financial professionals
* **Goal:** Develop a full-stack bookkeeping platform
* **Long-Term Plan:** Eventually expand into complete accounting software
* **April 15, 2026 Deployment Goal** to align with tax deadlines

**Key Features & Requirements**

* **AI Integration**
  + Voice-enabled chatbot assistant
  + AI assists development but doesn’t replace coding entirely
  + Potential tools: Gemini, Claude, ChatGPT, Eniden
* **Auditing & Transparency**
  + Users should be able to track money movement
  + Maintain an audit trail for accountability
* **Frontend & UX**
  + “Amazing frontend” — clean, intuitive, responsive
  + Good **optics** and simple usability prioritized
  + Mobile-friendly if possible, but not required
* **Backend & Database**
  + No required language yet
  + Database should remain lean and optimized
  + Emphasis on providing clear, understandable data
* **Security & Stability**
  + System must be secure, reliable, and stable

**Research & Planning**

* **Timeline:**
  + Research phase through mid-October 2025
* **Focus Areas:**
  + Bookkeeping workflows and accountant expectations
  + Competitor analysis — QuickBooks Online is a benchmark
  + Database structure and backend design approaches
  + Evaluating AI integration strategies
* **Tools & Resources:**
  + Gemini (free for students)
  + Claude, ChatGPT, Eniden, Flow, Suno, and other AI platforms

**Q&A**

| **Question** | **Asked By** | **Answer (Dr. Voss)** |
| --- | --- | --- |
| Who is the target audience? | Wyatt Morgan | CPAs, accounting firms, financial professionals |
| Is there a preferred tech stack? | Corey Unruh | No preference; prioritize security, speed, and UX |
| How important is mobile support? | Owen Graham | Not required, but useful if feasible |
| What’s the deployment timeline? | Wyatt Morgan | MVP ready by **April 15, 2026** |
| Should receipt processing be local or cloud-based? | Wyatt Morgan | Prefer server-side processing for better efficiency |

**Action Items**

* **Research Phase (due by mid-October):**
  + Study bookkeeping workflows and client needs
  + Analyze competitors like QuickBooks Online
  + Draft potential database structures
  + Explore AI integration strategies
* **Project Setup:**
  + Create and configure shared GitHub repository
  + Set up a reusable meeting agenda template
* **Prepare for Next Meeting:**
  + Summarize research findings
  + Propose initial high-level architecture ideas

**Next Meeting**

* **Date:** Wednesday, September 10, 2025
* **Time:** 8:30 AM
* **Location:** Class Meeting