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**00:00:01 Brandon A.**

Okie-dokie.

**00:00:17 Brandon A.**

Yeah, sorry, I don't know what's going on with my computer. Let me do my iPad.

**00:00:22 Naveed N.**

No, that's okay.

**00:00:23 Brandon A.**

Okay, I have it. Yeah, I have it pulled up right now. Okay, you can go ahead.

**00:00:28 Naveed N.**

Yeah, so I'll kind of start with the problem we're trying to solve at a high level. And so, you know, at Acuity we host a lot of different events through the year. Some are paid and some are donation-based. And we use Acuity through Squarespace for booking and intake forms. And then Stripe for the payments. Now Stripe, especially because Stripe can handle taxes properly and Acuity doesn't. so the challenge is that those two systems don't talk to each other very cleanly and so historically we've had people book and not pay and not complete their booking and then.

**00:01:04 Naveed N.**

intake information lives in acuity but isn't centralized anywhere we can actually work from unless we manually export it into a spreadsheet so usually usually the way it works right now is.

**00:01:14 Brian Y.**

someone will come onto the website and the way it's worked in the past is like you'll go through the squarespace website acuity like here's the registration page pick your class time they have payment integrated into acuity but again like he said it doesn't do the tax and you can't do pay with what you want to pay and that's only be set prices so the way i've been doing it is they don't charge them through acuity they get a confirmation email it says thanks for registering click here to finalize your registration by paying through stripe and then they have to then click.

**00:01:44 Brian Y.**

that and submit their payment so before an event i have to like pull all the data together in stripe, and look at the email data and I have to like manually see if

everyone's paid or not and if not I have to message them which the number of events we have now it's like takes forever yeah that's a.

**00:02:00 Naveed N.**

not in 2026 that's too much go ahead yeah and so um systems both Stripe designated hyperlink for that event and then acuity when we build up the events in acuity we have an identifying link there so those are the two things that I've been playing with and so I work around I've been experimenting with zapier and google sheets to create a sort of bridge where each attendee for each event has one record that gets updated whether the payment or the booking happens first.

**00:02:32 Naveed N.**

so booking yes booking no and so because again that's you have donation and you have so the idea is to treat it as a state-based system instead of like a linear one state of that that bookie it determines like what information, and what reminders might be getting sent. So, for example, if someone pays for an event and then doesn't click the registration link that we have in a confirmation page that links to Acuity, then we'd like to be able to send them a reminder,

**00:03:02 Naveed N.**

you know, with a timer on it, anywhere from 30 minutes to three hours or something like that. And then once we have that booking complete, we have our intake form, right? Now, intake form, we want all that information. It's like, we have standard questions, of course, demographics and contact information. But then we have retreat or event-specific questions that also need to be housed somewhere. And so my plan was to have a spreadsheet. This is the backend solution spreadsheet that would have all that information.

**00:03:33 Naveed N.**

that we would need pertinent to that daily operation. And then a secondary sheet that would have... the intake forms specific to that event that still requires us to do a lot of maintenance and pulling up sheets and things and this is this again it's still just a workaround, for what we have with those two different systems yeah it's a clever one yeah so i proved i proved that it can so yesterday i just pulled out a simple system just learning as vapier so a.

**00:04:04 Naveed N.**

trigger for the for the data to move from stripe to the spreadsheet was obviously a payment coming through that Zapier would pull that information and then a timer started for 30 minutes, okay the booking hasn't happened and then that information is either yes or no has happened, through acuity and so that populates our spreadsheet which is great and then the next piece was me pulling that data from the intake form to complete what was happening on the.

**00:04:35 Naveed N.**

spreadsheet, and then you know you can create a pivot table to each event so it looks there's a decent graphic interface for us to go through you know and just like explain stuff that would happen on an event so we have different types of accommodations that someone wants to use one of our bell tents do they want to use a nylon tent or are they self camping and so for us being in the in the forest trying to like get ready for an event it can be a little bit rough it's like how many freaking tents are we supposed to supposed to have ready for this weekend you know and so it becomes a lot it.

**00:05:06 Naveed N.**

becomes and it's hours and sometimes it takes us half a day just to figure out who's coming when they're coming and what can get ready for that let alone the dietary restrictions and everything else that happens we don't want to over engineer it but if there's a way that we can bridge acuity and strike have some sort of system that that's beyond our comprehension, You know, someone like you might know of, or do we do this thing in a spreadsheet? But then the next consideration is every single event will have an individual identifier based on that acuity hyperlink, right?

**00:05:42 Naveed N.**

So we don't want multiple ZAP clones, right? We would like a single system where, okay, ZAP notices that there's a new event that we could populate in maybe a spreadsheet. So we create the event, that hyperlink is taken in a spreadsheet, it sees that, and now it's looking for a striped payment that matches that event. And then we separate those by different sheets on the Google, different tabs, excuse me, on a Google sheet. So that's kind of where we're at with that. The documents you have, we don't have to go through it at all for the scope of this call. You can kind of breeze through there and see what we have going on.

**00:06:16 Brandon A.**

Yeah, yeah, I've been kind of reading as I've been listening. Yeah, so I actually use Zapier as well for like kind of... like quick and dirty solutions like this um or you know because i don't want to i don't want you guys to have to pay for it um like you know ongoing um so they i did some i just googled a little quick google search and acuity and stripe both have apis as like apis so we can leverage those um that would be obviously more of a code first approach um but there's yeah there's.

**00:06:49 Brandon A.**

a lot of i guess it depends on um like once i see the data because i'm trying to think it sounds like you guys kind of want like a central dashboard and maybe like a centralized database.

**00:07:01 Naveed N.**

like a postgres backend database yeah exactly exactly and automation right so like we'd like to have automations for people who haven't registered we'd also like to

send text messages, uh the day off the event, If we're just specific to the event, we have two meeting points. And so, yeah, we would just set, okay, look, we'd like people to meet at meeting point A or meeting point B and then have those automatically sent to Brighton or Port Bali or Wakefield earlier that day and just shoot that freaking text message.

**00:07:29 Brandon A.**

Oh, no. That's not a history.

**00:07:32 Naveed N.**

Yeah, individually. So there's a lot of manual stuff that happens. And the last thing I'll say about APIs, I don't know much about what that world looks like, but we'd also like the ability to make changes ourselves and be a little bit proficient in that. But if that's something that's not within our scope either, then I don't know how – we'd need to call you basically every time we had a freaking problem. We'd like to be a little bit autonomous as well with it.

**00:07:57 Brandon A.**

Yeah, of course. So essentially the way that I'm – thinking about it and this is just kind of my stream of consciousness right now, is the API would i would wire that up and that would just be like a one and done situation to where it's just connecting the systems to where they can um it's like share data between like with each other and then kind of capturing each um event or i guess event each interaction or whatever kind of data point you guys want to capture um would be stored in like a back-end database we could use postgres or we could use um like something simpler on google sheets or.

**00:08:32 Brandon A.**

something and then um yeah so that's the first word you said what was that first word um it's called it's just like a sql database it's called uh PostgreSQL okay you're speaking gibberish now thank you for that yeah yeah no worries hey this is all it was all gibberish to me before i learned it so okay cool but yeah so it's what you guys are describing um you know, Might sound, you know, a little bit simple, but I've noticed in the notes that you guys are very, whoever made this, by the way, kudos, very detailed.

**00:09:06 Brandon A.**

But yeah, so this is, I guess it depends on how complex you want it to be. But from what you guys described, I can take care of this and set it up for you guys and then kind of walk you guys through what I did and stuff like that. Yeah, I was going to say, I'm going to spend a little bit more time researching it after the call.

**00:09:53 Brian Y.**

So like that's. unless there was like a massive massive advantage some other way then like for me to switch everything be a big thing um yeah like if you if you told us

like hey i can embed this other checkout page and acuity like i mean whatever that's what i was gonna ask is i'm sorry interject.

**00:10:13 Brandon A.**

is so is the tax the tax issue is that um is that pretty much what's tying you guys to stripe i'm.

**00:10:19 Brian Y.**

not i don't know much about either but yeah the tax is automatically calculated and paid by the maintenance of our size not not management is important but the thing that's actually more important is we have so many events where you type in what you want to pay versus i'm telling you what you have to pay that option doesn't exist at any at any level in the community you can only like set an exact price for one event for one oh gotcha so is that what squarespace uses.

**00:10:51 Brandon A.**

makes sense yeah.

**00:10:55 Naveed N.**

we're using a version of acuity that is embedded in squarespace it's not like a full acuity commerce or whatever that word is yeah that's what i was gonna ask i didn't know if you guys.

**00:11:07 Brian Y.**

had the full setup or what okay cool yeah yeah it's just it's just automatically embedded in, squarespace so since that's what i've been building what's like that's what we built everything off the back end for registration yeah it all works and does the things we wanted to do are just the two systems like and you know most people pay but like i'd say out of every hundred there's like probably 15 or 20 i've gotta like find who didn't pay and like and then i'll.

**00:11:38 Brian Y.**

have registrations and i think the person's coming but then they didn't actually pay so.

**00:11:41 Brandon A.**

they're not actually coming it's just like yeah sounds like a logistics nightmare and i'm all about logistics and automation and all that good stuff so one major change we made was in the past.

**00:11:54 Naveed N.**

that's what was happening right we would send someone an acuity registration link and they would complete that and then we would direct them to a Stripe payment link afterwards, that's where he was getting booking and not getting payments so about a couple weeks ago we switched every event from no you've got to pay first and then you've got to do your booking and we already had one failure with with

that uh with that uh workflow well to be fair though that one was actually our fault yeah it was our fault but it was still a failure.

**00:12:26 Naveed N.**

but but energetically we kind of feel strange about that right like we're asking someone to pay, and then they go through and they sign our waivers and do everything else and so i'll waver it's written in soft language but yeah i don't it just doesn't feel completely yeah that makes sense yeah.

**00:12:46 Brandon A.**

because you got to think about like what let's go like how it feels to the not the customer but the, customer and how it feels to the not the customer and how it feels to the customer, whatever you guys want to call it. Client, I don't know. I'll let you say customer. I know what you mean. Yeah. But what goes in their mind.

**00:12:59 Naveed N.**

I was saying patience before. I was saying patience yesterday when I was doing this because that's the word I was in.

**00:13:05 Brandon A.**

Yeah, patience. That sounds more apropos. But yeah, I think what you guys built, in the interim, the ZAPIer, is definitely, by no means, it's a robust solution for sure. I just don't want you guys to have to be stuck in that world and having to pay them every month. And then I truly think I could do it better. But yeah. So yeah, I think, what's the timeline do you guys have for this? Anything in mind.

**00:13:36 Brian Y.**

Well, I mean, we can do what we're doing now. So it's just, you know, like it's not, I mean, our first events really start up primarily in March. So, like, I think if we could use the month of February to get something live and tested, it would be great. I think, like, the number of things I've got to deal with really starts to pick up more in March than any other time. Like, February is just going to be kind of, like, wrapping up time.

**00:13:59 Brandon A.**

Okay. Yeah, that makes sense.

**00:14:01 Brian Y.**

So, if you want to just kind of, like, research and poke around and then come back to me, and then I definitely want to pay you for this. So, you could come up with a sense of, like, time and how much we'll go into it with different things we could do. And then we can figure out if we could get something to work for all of us.

**00:14:16 Brandon A.**

Yeah, that sounds great. I was going to set a few questions. So, firstly, so, as far as, like, any kind of big, not vacations, but, like, where you guys are going to be out of

pocket or out of office. You know what I mean. Anything going on besides Sundays. Yeah.

**00:14:35 Brian Y.**

No, I'll be around. I'll be around the very accessible February.

**00:14:39 Brandon A.**

Okay, cool. And then is there, if you could like send me, give me access to your current, like your current setup, just so I can see the data. It helps me kind of contextualize everything and kind of make it more concrete in my mind. That'd be great.

**00:14:57 Brian Y.**

Yeah, I can add you to Stripe and add you to Squarespace.

**00:15:01 Brandon A.**

Beautiful, beautiful. And then, um, I think Yeah, you can use Gmail. My computer decided to start working as soon as I got it pulled up on my iPad. So that's, that's fun. Go ahead. Yeah, that'd be awesome if I could, yeah, take a peek at what you guys worked on. And then as far as deliverables and next steps, I sound like I'm on a business call. Sorry, I have old habits.

**00:15:43 Brandon A.**

Let's circle back on, yeah. Yeah.

**00:15:48 Brian Y.**

We need a client-facing portal as well.

**00:15:50 Brandon A.**

Yeah, a client-facing portal, there you go.

**00:15:53 Brian Y.**

And I'm definitely going to need an SOP from you as well.

**00:15:56 Brandon A.**

Of course. So I think next steps, I can research and then kind of, once I get that access to the systems, poke around and look at that. And then I'll talk to you guys about, I guess I'll talk to you, Brian, about some potential, I'll present like two or three different options and see what you guys think would be aligned, which would align with you guys.

**00:16:26 Brian Y.**

Okay. That sounds great. I thought this was, you know, wheelhouse of what you would be good at.

**00:16:33 Brandon A.**

Yeah, listen, I've been looking for work, so this is a welcome opportunity, so, yeah.

**00:16:41 Brian Y.**

All right, well, Naveed, did you have anything else to say.

**00:16:44 Naveed N.**

No, it's just, like, little random things that I'm thinking about. When I say client-based, we do have, like, co-creators and stuff as well, and so we'd like the ability for them to maybe log into us before coming to them. They can see, like, who's signed up and what they pay and stuff like that.

**00:16:58 Brian Y.**

That's another huge, like, efficiency drain on me is, like, pretty much everything we do, I co-host with someone, and then they're constantly, like, has anyone signed up? Oh, how much do they pay? Like, who is the person? You know, and I'm like, okay, hold on, I'll be home later. I can log in and send you screenshots.

**00:17:15 Brandon A.**

Yeah, you were kind of like a...

**00:17:16 Brian Y.**

Go ahead.

**00:17:18 Naveed N.**

Yeah, can we upgrade this person to a bigger tent? And it's like, gosh, I mean, maybe. I'm just 45 minutes out of my time today.

**00:17:26 Brandon A.**

Yeah. Yeah, it sounds like you guys kind of need like your own ERP system, kind of like a custom. I mean, that sounds like a big, huge, huge project. But I mean, I think that with all the tools and like the AI nowadays, getting something from like MVP to production ready. Like I just did an app for Brian, you know, Joe Carty.

**00:17:51 Brandon A.**

Yeah.

**00:17:51 Brandon A.**

Yeah, his dad is a lawyer. So I've been doing some paralegal work for them, just automating like intake forms and like extracting information and details and putting that into databases and then wiring that to the front end of the dashboard. So, yeah, I don't know if you can tell, but I'm actually really excited to take this on. So, yeah, I think unless there's any other details you guys have or like pain points that you can think of or.

**00:18:21 Brandon A.**

anything else did you say that we need to add you to Zapier uh if you could yeah that would be awesome.

**00:18:26 Brian Y.**

so is that your account or my account your account it's all on your account okay and then you just.

**00:18:34 Brandon A.**

say that gmail address is the one you want added to everything uh yes let me let me double check before i confirm i want to make sure my Zapier i don't know if it's Zapier Zapier or what. yeah i just know i call them like zap they're called zaps or whatever, um okay so if you could actually yeah gmail is good yeah you never know with icloud or gmail.

**00:19:08 Brandon A.**

cool so yeah i think that um i don't want scope creep to, Like to interfere with the dates that I'm going to give. But yeah, I think I could do this in a couple of weeks, if not sooner, have like a minimum viable product, just like a prototype. And then we can test it alongside your current system and just maybe like late February and see how it's doing. I mean, I'll be testing it immediately as I'm developing, but yeah, I think that's definitely feasible.

**00:19:43 Brian Y.**

Sounds good. Well, I'll add you to all three of those later today and then I'll text you.

**00:19:50 Brandon A.**

Okie dokie. Sounds good. Thank you guys for your time. And Nivea, enjoy your 10 days away from the world. That'd be awesome.

**00:20:00 Naveed N.**

Oh man, my inner world, that's where the work is done.

**00:20:03 Brandon A.**

Yes, that is right, my friend, that is right.

**00:20:05 Brian Y.**

All right. Thank you so much for listening and hearing us out, brother. I appreciate it.

**00:20:08 Brandon A.**

Of course. Yeah, thank you guys. Talk soon.

**00:20:10 Brian Y.**

Lots of love, guys. All right, take care.

**00:20:12 Brandon A.**

All right. Thanks. You too. Bye-bye.