CM Client Meeting 1. Notes

Login:

-Manager

-Full access, fully malleable

-Must have access to override restrictions such as inventory, scheduling etc.

-Add/remove/modify searchable Client/Venue Database & notes

-Edit inventory

-Create Categories

-Add/Remove/Update items, place in categories

-Create relationships i.e. tv must have stand and cabling

-Equipment States: Available, Rented, Held, To be Inspected, To be Repaired,

Out for repair

-Create bundle templates

-Create Categorized Invoices for different roles from same source (Audio, Video, Cabling, Etc)

-Managerial Invoice

-Employee Invoice

-Customer Invoice (invoice details below)

-Access/Export sales

-Daily, weekly, monthly, quarterly

-Schedule

-Ability to schedule employees to specific jobs

-Ability to add/remove employees, change availability

-Ability to assign employees pins/credentials

-Ability to set privileges of other members

-Approve/Deny changes by others

-Employee

-Can see EOs assigned to them and others

-Has all relevant info on venue/client and their notes

-Can view inventory, push changes for manager approval

-Add client/venue notes including images

-Can enter/modify Availability and request time off

-Can enter actual hours if different than expected hours(does not affect customer price, but does

affect record keeping)

-Administrative(Book-keeping)

-Access for all statistics

-Access to relevant payment options and actions

-Add/Remove CC on File, Payment Method, Mark Paid, authorize for amount, cancel auth

-Export sales reports and financials to Quickbooks

-Add Client/Venue Notes

Inventory Management:

-Add/Remove/Modify Items and their states

-Name

-Model

-Price(new)

-Cost to client per day

-more fields in time

-Respond appropriately to the different states, trigger warnings that require overriding for overbooking

Billing:

-Credit cards

-Deposit

-day of payment

-refund

-damaged items

-long term scheduling (scheduled well in advance, payment not yet due)

-Pre auth or re auth for extra charges?

-Checks

-Can be done online?

-Paypal?

-In app non payment notification to manager/administrative

- Local tax rates for counties of sale?

- Tax exempt status for nfp/udaction sector

- rain dates %50 extra

Scheduling:

-Weekly and monthly calendar views

-Weekly view in hourly slots

-Monthly view in days

-Auto populate availability(with override)

-Weekly availability view(overlay employee availability)

-Approve deny time off

-Generate bi-weekly schedule

-Export to windows, ios, and android calendar apps if possible

-Truck Scheduling

Invoicing:

-Managerial Invoice

-Includes Labor and all equipment/financial details

-No Client/venue Notes

-Employee Invoice(EO)

-Check List

-No prices/labor used as EO(event order)

-Only info relevant to doing the gig, equipment needed etc

-Client Contact #, Venue Address

-Client/Venue Notes

-Customer Invoice

-Includes prices, but formatted for added value (highlighting complementary

services i.e. cabling package)

-Labor added under a nicer name i.e. delivery and setup or TOS(Tech On Site)

-Export to quickbooks

-Detects and prevents overbooking(can be overridden by manager)

-Discounts/promotions codes

-Relevant tax information/analytics?

-Info for depreciation? Receipts?

Client/Venue database:

-Client ID/Venue ID to add remove notes, images, contact info, payment info, etc

-Potential: Preferred client status

-Referral code

Calendar:

-Weekly and Monthly View as outlined above

Categories:

-such as Audio, Video, Cabling, Adapters, Stands, Screens, pipe&drape, etc

Potentially Unobtainable(without api):

Communications:

-Quote automation, harvesting info from forms into app automatically

-Populate auto-response forms with relevant info or packages if possible

-Pre auth notices before charges

-Non payment notifications to client

-send receipts

-ability to send/automate certain email through app

-batch/individual email to client/employees

* auto response emails for when unavailable w/ priority
* Day of confirmation/checklist
* Post event customer feedback.

Question to PD: Can we use APIs for non-integral features that all but require them? If we want to, that is.

Other:

offline capabilities(unlikely)?

Travel Time? Generate google maps link?

research:

* r/livesound and similar reddit research on who uses what tech
* market / competition research

Services:

* Setup
* Maintenance