**Notes Summary / Plan**

1. Share our overall project plan/what we have accomplished
   1. [Research Document](https://docs.google.com/document/d/1H1OAf9mxP_z1Dni4iOCLyego0qvRes_54YANmLG3TmE/edit?usp=sharing)
2. Discuss possible solutions based on our the current preliminary research we have done
3. Ask clarification questions
   1. What is the total time taken for the entire data collection process?
   2. What features would you rank from highest to lowest priority that you would like to see implemented from the scanning system?
      1. Ability to create invoice by scanning item
      2. Ability to to identify item by scanning
      3. Ability to remove item from inventory
      4. Ability to add item to inventory
      5. Any other features
   3. About how many volunteers does your organization have?
4. Set up goals for next week and what we should accomplish by then
   1. Continue conducting background research
   2. Polish up proposal so we can run it through with client

**Major Takeaways:**

1. We no longer need to focus on making sure our system links back to Quickbooks. In fact, it would be best if we find a software that would allow Jon to move as much of the inventory tracking out of Quickbooks as possible. The ideal output would a report generated by Jon who would pick the fields of data he wants to be exported into a Spreadsheet for him to manipulate further.
2. Mobile function for app to scan to deduct from inventory
   1. Then give the option to create invoice from desktop
   2. Want a functional scan, not just informative
   3. Scan into a deduction or receiving queue for jon’s final approval
   4. UPC on each skid (might change, Jon is getting back to us on how he would want the touchpoints of the scanner to work and where the data transfer to Quickbooks would happen in the process)
3. Current time it takes for inventory process just to verify digital vs physical product counts
   1. Any mismatches requires Jon to manually go in and do an inventory adjustment
   2. Takes 2 guys 3-4 hrs each to go count every unit on hand
   3. Done quarterly

**Notes**

* Jon wants
  + Multiple users at once
  + Possibly change permissions for each person
  + Add / deduct from inventory
  + All of these point to wanting an established software rather than built
  + Would be totally okay if it was standalone from quickbooks
* If there are fields for different items - want to be able to pull reports
  + What item do i have the most quantity of
  + What items do i have
  + Every item received from x vendor
* Quickbooks is primarily for financials
  + If he can put in a dollar value for an item and pull a total $ amount for the item, that is enough to put into quickbooks
* Report for inventory
  + Item line with x number of fields
  + Basically SQL queries if it was done in SQL
  + Return an excel format
  + Wants customizable data reporting
  + If we pull the info needed, he can do the excel manipulation
* PRIORITY
  + Mobile function for app to scan to deduct from inventory
    - Then give the option to create invoice from desktop
    - Want a functional scan, not just informative
    - Scan into a deduction or receiving queue for jon’s final approval
    - UPC on each skid
  + Manage users, manage inventory from desktop setting
  + Pull reports and manipulate data in EXCEL
  + Wish (not need) - mobile invoice creation
* How many volunteers
  + 4 volunteer days - mon-thurs
    - Each has 2 shifts
  + Could have groups come in from other companies/orgs
  + On a regular basis, to cover all shifts - average 5-10 on any given shift
  + Highly variable based on orgs available, time of year
  + Pack boxes primarily
  + 3-4k boxes produced a month
  + 25-35 lbs a box
  + Volunteers also sort through bulk donations
    - These go into different kinds of boxes
* 3 boxes currently
  + prepacked -23-35 lbs
  + Senior 30 lbs
  + Student 15-20 lbs
* Current time
  + Digital inventory and physical inventory - they SHOULD be the same but theyre not bc of human error
  + Takes 2 guys 3-4 hrs each to go count every unit on hand
    - Done quarterly
  + Roughly 960k worth of inventory currently
  + Steps
    - Time: on a good audit - only takes ½ hr to fix, if more severe -
    - Go to qb
    - Qb has physical inventory worksheet to do written checks
    - If its inaccurate - do an inventory adjustment to match digital quantity to match physical count
* Hates about qb
  + Hates average cost per unit based on history of item
  + Lists asset and retail value as different values based on average cost per unit - wants to eliminate this
  + Different sources for the same item creates different associated cost
    - Subsources from state food
    - TEFAP is prescheduled - give you cost, item number, etc ahead of time
    - Others are just a check and tell you to go buy the rest - need to shop through different vendors to get best price