Original meeting was on 8/23/21 (Monday)

Reviewing with Cory on 8/26/21 (Thursday)

Drew Middlemiss & James Helmer

* High Valley Bike Shuttle
* Since 1994 – when it started – old school – binder and done by hand – currently payments are done the day of
* Bring it into the newest tech
	+ Waiver – digital click through – maybe a sign option
	+ Go to the web site – click here – show the dates (calendar) some color coding – available days – figure out a timeslot – 8 or 10 am – 42 seats (slots)
	+ If they are reoccurring, simple check-in – saved profile
	+ Possible email reminders
	+ Waivers – just a refresh for existing clients/customers
		- At least a signature for each time using the shuttle
	+ There may need to be a reminder sent out 24 hours
	+ Handle cancelations
	+ Simple – pick a date, pick a timeslot, how many in your party
	+ If there are multiple persons in the party – everybody needs a signature
		- May have to ask the forest service guys – real signature or check a box and type your name
		- Talked about two options – real signature (image based) or text with date/time stamp (simple database storage)
	+ Talked about the main contact (customer) and then sub contacts under that main contact – We could also use flex grid to keep it simple – this may allow us to show links to sub invoices, custom fields to help and manage check-in’s, etc.
	+ Need to get the main customer info or provide a login (existing)
	+ They are allowed 1,800 user days… They need to keep a master list of options – every person needs to do the tally – every $35 that they take, it needs to tally
		- For us, I was thinking about having another element of time that had the 1,800 as a master budget level and then we could add tally marks against that as new bookings happen. That way they could see what was left and/or remaining.
	+ 3 person minimum for a valid shuttle
		- They won’t run the shuttle if there are less than three persons per timeslot.
	+ They would love to see some reports that show – full tally – per day – what is still available
	+ We talked about deposits and how to pick up those payments – this is on the backend or normal adilas side of things
	+ Shari O. – put through the chat about another booking site – we never went and looked there but got the ideas on a simple layout
	+ Important – make sure and validate the seat count before doing the reservation – we may need to do this validation twice – once when they are looking at the general availability, and the other one just before submitting the cart (during that checkout process).
	+ Briefly talked about PayPal, Venmo, and normal merchant processing (USAePay) – currently the plan is just normal merchant processing
	+ Trying to start with just the normal reservations and bookings – there may be more rounds later on
	+ What about check-in process – some sort of barcode – paid and accounted for – some sort of a trip back to the database to note the check-in – think about this – barcode and some way of doing a quick check-in – be able to print a roster and see who is there and who has paid
		- Thinking flex grid and a custom field for check in – run a report per day or per eot – allow quick checkboxes and be able to do bulk or be able to print out.
	+ From Cory – what are their pain points? Where can we really help them out? We can’t do everything – pick and choose – then help them do things manually and then propose value add-on’s.
		- The whole things starts online when the person books the trip. This is the piece that we don’t have yet.
		- Show the calendar slots
		- Maybe allow Guests or Buddy’s – generic person
		- We are seeing that the eot will hold the flex grid for names, invoices, wavier info, sign in’s, etc.
		- There are two main pieces – registering and then checking in
		- Custom code just for them or new settings for everyone to use? Shooting for everyone – this is the way and wave of the future.
	+ What about the WanderWays stuff? Cory would really love to use some of that for this new stuff. That would be so cool! This would be worthwhile to check it out…
		- We could go from WanderWays to what we want or we could do what we need and then move towards WanderWays – either way
	+ As a reminder – build it out until you could hand it off – you don’t have to do the whole thing

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Questions for them….

* On the waivers – single or could we do a multi wavier (per invoice – main person and their party/guests)?
* We want to build the main user interface (on the adilas side) – we need to charge for the waiver piece, the limited slots, the master tally and count down, custom flex grid tie-ins, the bulk check-in process, etc.
* Assuming that their budget is $1,500