Scenario – rafting company – raft trips, snacks, t-shirts,

Corp id = 1485

Vendor

Raft the Rockies

Part categories

Trips

Merchandise

* We did some special web settings here

Parts

Brown’s Canyon Half Day – 75/per – no taxed - unlimited

Brown’s Canyon Full Day – 125/per – unlimited

Number’s Half Day (advanced) – 75/per – unlimited

Milk Run (beginner/family) – 75/per – unlimited

Could also do Royal Gorge, parkdale, other

* There are some special web settings per item

Corp wide settings

Parts >> Products

Time Template (just 1 of these)

Raft Trips – doesn’t need to be tied to the part category

Color, start date, start time, end date, end time, budget settings (how people can come)

* As you make time elements – the tile has to match a physical part number (text match)
* For example: Brown’s Canyon Half Day >> need a part with the same name and a element of time with the same name – need both

Flex Grid Setup and limited flex grid stuff

Time ecommerce settings

Next steps –

* Details, descriptions, photos, category photos, new items for numbers and milk run, new eot’s for numbers and milk run.
* Black box stuff and making it more dynamic and turnkey
* Learn how to make it sing – show on web (parts and time), adjust availability, etc.
* Make the eot’s from memorial day to labor day 2023
* Add some more merchandise – basics
* Make it pretty and complete – nice little demo site
* Might be nice to get a sandbox for merchant processing – optional

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11/8/22

* Brandon did some new product category images
* We started looking into verbiage on the categories and product levels
* Idea from Danny – Let’s gather some info and get some things entered in
* As a side note, pets are really becoming popular
* Sales idea from Danny – they make quite a bit of money on the merchandise and photos. Maybe use some of the bookings (data) to come back and buy things with a certain discount or promotion code.
* The photos are set at 800\_w x 600\_h and as jpegs. If needed, Brandon can help with graphics.
* Wish list - Brandon was pitching a new my cart favorite button for time… You click on the time button, it is tied to the product, we then get the date and quantity (party count), when finished, it adds it to the cart. The cart acts normally until checkout. During checkout, the code ties everything else together (time, flex grid, invoice, customer, and payment info all tied together).
* Danny asked about cancelation verbiage

Who is going to do what:

* Done - Brandon will work on the special bulk tools for flex grid to make them show up based on settings. Currently they are tied to black box stuff. We will flip it so that it will be tied to settings instead (cleaner).
* Brandon will work on the trip products (for trips – the rafting trips). Descriptions, photos, and verbiage.
* Brandon will work on the logo a little bit
* Brandon will work with Bryan on any little tweaks that need to be done. Light clean-up. Broken images, links, etc.
* Brandon can help build out some other reports for watching and monitoring sales, payments, and values.
* Danny will work on merchandise products – whatever a rafting company would sell
* Danny will do some expense/receipts
* Let the system auto generate the barcodes, use both upper and lower case as needed, and keep things all relative to the rafting industry.
* Shari O. will work on some of the snacks and such.
* We need to add more dates – Memorial Day to Labor Day

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11/15/22

Scenarios from Danny

* What about rivers from multiple places? Where do people start? Brown’s (BV) or Royal Gorge (Cannon City) – We talked about just listing them out and putting the location info on the second tab – where to go and what to know.
* What about shuttles
* Danny wants the balance sheet to be perfect. Shari O. is willing to come up with a template of sorts (how to get things started – banks, investments, etc. – what we need to get started). – This can take some time, but it is very powerful for the demo.
  + Danny wants a list – where do I start so that everything gets entered correctly? Valid request.
  + Operations and accounting – we offer both – and they are tied together (part of our pitch) – but they are not required. Where is there pain?
  + SOP’s (standard operating procedures) – Where to start if you want X (fill in the blank)
  + We lack in the education and training. We have a rocket powered race car but no driver’s manual. If you know how to drive, you are good. If not, you better get some good insurance… :)
  + Both Shannon and Russell have made some fun videos to help with basic education
  + Kelly may have some SOP’s
* Making the plan before we jump into the computer – figure out the
* They are wanting to show the demo site on Friday in the sales meeting
* Danny will keep adding in things to make it come alive
* Shari O. is willing to put in some banks, deposits, investments (equity), etc.
* Shari O. is also willing to check and look for any kind of SOP for simple procedures
  + Maybe look at the welcome packets – simple start up stuff
  + Sean was saying that it may be on the Google drive – stuff from Marisa