Meeting with Alan and I – overarching general plan – day 3

6/21/23

* This was some planning that we did yesterday. It was on a different document. Copied it over here on 6/21/23.

Users:

Scratch – just recording info:

* login and logout
* View history
* Profile for themselves - create an account - new adilas system
* Update password and contact info
* Personal time cards
* Project time cards
* Permissions and/or access to multiple systems - allowing access and/or bridging between systems
* Maybe a request to join a new system - back and forth between them
  + We thought that at the corp level we could deny this as well. No, I don’t want anybody to request access.
* Based on usage, storage, traffic - be able to control my level and/or tiers
* If I’m assigned to multiple worlds - be able to switch or pick and choose - also be able to set a default entrance or default corp to land in - control from their profile
* A way to pay their monthly bill - payment info - could also provide a link where they could just pay it - we could also store their info on the merchant gateway and then access that - ids and tokens as needed
* If they want to cancel it, they can do it themselves
* Ways to contribute - suggestions, feature request, be able to pitch in (donate or pay), report bugs, other social options, submit a ticket, tech support access, report on payments and invoices for each person (history).
* See general stats by user - x number of invoices, y number of E/R’s, etc. How many sign-ins, adilas cafe idea, show their general stats and let them market themselves, achievement levels, certs, etc.
  + Small example: 1-10 invoice, 11-50, 51-100, whatever - different levels and show status.
* Personalization - look and feel
* Custom toggle on/off navigation
* Training and cert levels - courses and completion levels
* Payroll and tax info - future
* Permissions to assign other users their permissions and roles into your system
* Maybe a request feature for certain permissions in other already established systems or connections.
* On permissions - be able to show/hide permissions based on higher level choices
* On the adilas cafe… we need to build this to allow settings and even bypass this based on settings. Similar to the news and updates (people want to skip it) or the choose multiple corps (what is your default). The cafe needs options for my stuff (personal account), work, play, sell, buy, participate (social or whatever), training, discussion board.
* As a note, we may need to flesh out the adilas cafe concepts and pieces before we really get into the users and what they can do.
* In general - if we are tracking their progress and number of login, keep feeding them tips and hints, if they want it. Allow access to those things later on if they turn it off.
* Corps could have a setting - am I public (allow others to see me on the cafe), i’ll use referral codes, or nope, I’ll manage everything internally.
* On the user stories… what if we helped them create an account and then we dump them over to the adilas cafe. We may want to create user stories on first time hitting the cafe, 2nd time, etc.

\*\*\* working here \*\*\* - maybe restart with a simple login and create account. Then dip out to the adilas cafe and build the users stories from there.

* Just for fun… user story… new user, just playing around for a demo. I just want to get a free account.
  + Step 1 - demos, videos, or simple playground - using a default or preset user. Possible promotional stuff. No commitment.
  + Step 2 - create an account - super simple
    - Username and password
    - email
  + Step 3 - The first thing I want to see is a simple recipe, template, or wizard type setup. Hit the adilas cafe (options). If they skip it, we do the default.
    - Possible cafe options (after the first time - maybe show other options). Take them through it the first time and then they could tweak it after that.
    - They could chose simple steps, industry specific skins, levels, etc.
    - If they want to tweak it out… show advanced options
    - Allow them to choose their level of play - beginner, intermediate, advanced, custom - have access to videos and demos of each
    - What do you want to do, see, or track?
    - All permissions and settings are set in the background once submitted. Hide everything that was not selected.
    - Side note - use some machine learning and AI - if they do the same thing every time and don’t have a setting set for it, maybe prompt them to make that a choice in their settings.
  + Step 4. - Land on the main homepage or dashboard based on choices.
    - Show upgrade options
  + Step 5 - start working…
* New user story - user setting up a basic or simple mom and pop account
  + Step 1, 2, and 3 would be very similar to the free account.
  + Step 4 - we need a little bit more contact info and payment/billing info.
  + Step 5 - land them on the homepage and start working
* New user story - user that just wants to be an employee for someone else's system (currently doesn’t exist)
  + Step 1 and 2 would be almost the same. There could be a simple menu - are you coming to work, play, buy, sell, participate, my stuff (personal account), etc.
  + Step 3 - They choose to join or request access - from the adilas cafe page
    - If they ever come back here, they could setup their own stuff, if they want
  + Step 4a - If they have a referral code - it could auto connect them up.
    - If they have a link we could skip this whole process. Just connect them in the background.
  + Step 4b - They have to make a request and wait for a response. Still a referral code to help point it to the correct corp and/or world.
* New user story - an existing user (admin or HR person) wants to add a new employee.
  + They would need to have a permission and/or a link to the add new employee form or page.
  + Once on that page, it may be something similar to the add/edit payee page that exists right now. It shows user info, permissions, and roles, and they can use preset templates as needed. We need to allow some employees to login and some not to login, even though they will be listed as an employee.
  + All of the required and optional fields could be configured. Show, hide, locked, hidden, allow user to update, etc.
  + There will be a difference between the master list of users and their info and what each corporation uses and records.
  + Going back to the main user account (the actual employee). They should be able to show/hide or make certain things private. This may require the HR person to add/update this info manually.
  + Dealing with the tables – master user list and the payee table per corp – we need to create a link or relationship between the two.
  + When the HR person searches the person’s name and info, we can pass over any data that is not marked as private.
  + Currently, we do have a very basic permission that allows a user to update and change their profile information and password. It’s currently a yellow or super general permission. We may still want something similar.
  + The email address helps us link things up. Once a user gets that link, we pull up a page showing what is requested. We auto populate whatever the user has said was public. The user then fills in any missing information.
  + On permissions – currently we allow users to change their own info. Do we need a lock or anti-permission where people can’t change their own info after the initial create/bridge process? This may be something that the HR person toggles on/off for each person.
  + This may not go here, but we have some payee permission templates (corp specific rules and presets). We will need something similar to help speed up bringing on new employees. The admin person could edit or modify things but the presets help to seed up the process. A permission recipe of sorts. We currently have something similar, maybe grab some code of ideas from there.
  + If the new employee is going to login, they need an adilas account (be part of the master list). If they are not going to login, they could just exist on the corp side and go from there.
  + If they are going to login, they need to use the email referral link stuff. This could include a request for such and such data, the user could fill it in, pull it from his/her account, and send it back to the employer (person hiring them).
  + Scratch - build new or request - think of like Kelly or a super user
  + This may break into multiple stories
  + Send an email or text that creates the link between systems
  + We may need a way to auto generate a unique (temp) username and password
  + Other HR questions - what if they don’t have an email (the new person), don’t have a cell phone, and doesn’t have a computer, or people who quit or get fired, other HR questions. Somehow they need to get an email address or sign-up for one. This is going to be the main connection piece.
  + What about the person who gets records created for them vs a user actually using the system. For example: Bill is in HR and wants to create records for Amy or whoever. Amy has no actual login. How does that work?
  + HR/admin can only control their realm.
  + We may need certain features that allow for certain tasks to be assigned to certain people. The real histories need to really record who did the record. Histories on everything.
  + If our client doesn’t like or want to use “adilas” they could configure a white label page where the user could sign-up for an account.
  + Going back to how things are done right now – A client or a rep reaches out to Shari O. She puts it into the master list (new corp). That gives her an id number. She then goes to that server and enters the new corp using the new id number. She sets up a bunch of other things and ties in a master user. She then turns stuff over to Shay and she does some logos and look and feel. Etc, etc. - finish this out…
  + We have to automate the creation of new corps. This includes databases, tables, dummy data, look-up records, datasources, permissions, etc. Back in the day, we were going to script this and provide a list of buttons or links to do certain tasks. We would love to automate this and then report back.
  + We could setup things just in time… on the fly as needed. That could save a ton of time, especially if they are smaller user.
  + Maybe setup new accounts on an economy server. Then if they keep going and grow (valid or real), we could move them to where they need to be located. This could be a physical move or some mapping, depending. Keep it simple at first until they prove that they are real and operating.
  + Keep the backend completely separate from the frontend. Thinking along the lines of API sockets, apps, and virtual mappings.
* New user story - affiliate level - who gets credit for the referral
  + Scratch - maybe some discounts and/or other incentives
* New user story - what about merging users
* New user story - super high admin system level - managing one-to-many relationships between master user list and individual payee records.
* Idea – maybe list our stuff on the app store. That way people could find it and install it on their phone or mobile device.
* Alan has been playing around with React – JavaScript framework for the frontend. It compiles just in time but that means that you don’t know about an error until you actually hit it. The framework has some good error messages and helps you know where to find things, but it compiles from what you say, meaning the ending code is not what you coded. That can be very tricky.
* Alan showed me some samples from React Bootstrap. We also talked about building out our own small mark-up that runs on top of these frameworks. It becomes really simple for us and custom to our application. Just some thoughts and ideas.
* Eventually, we could and would be linking all kinds of backend and frontend functions together to make the final output.
* We may gain a lot by doing vanilla JavaScript vs going with a framework. One big advantage is that an existing framework should have a bunch of the bugs worked out. If we just did our own, we would be in charge of the full debugging process.
* Talking about tiers and tier levels
  + We talked about free/demo, basic, standard, pro, enterprise
  + The free/demo version would be the same as the basic level but throttled down to certain usage ranges – for example: up to 10 invoices or something like that.
  + To determine the tiers – we talked about: user counts, invoice counts, customer counts, product/item counts, invoice values ($ amounts), locations, and size (shared, semi-dedicated, dedicated, clustered, etc.).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Free | Basic | Standard | Pro | Enterprise |
| Users | 1 | 1-2 | 1-10 | 1-50 | Unlimited |
| Invoice Count Per Month | 1-15 | 1-50 | 1-500 | Unlimited | Unlimited |
| Total Invoice Value Per Month | Up to $5,000 | Up to $20K | Up to $200K | Unlimited | Unlimited |
| Customers | Up to 100 | Up to 200 | Unlimited | Unlimited | Unlimited |
| Items/Products | Up to 50 | Up to 200 | Up to 1,000 | Unlimited | Unlimited |
| Locations | 1 | 2 | 1-10 | Unlimited | Unlimited |
| Hosting Size | Shared | Shared | Shared, semi-dedicated | Semi-dedicated, Dedicated, Clustered | Dedicated or Clustered |

* These numbers could change… just putting it out there right now.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Features | Free | Basic | Standard | Pro | Enterprise |
| Adilas Café | X | X | X | X | X |
| Add Users |  | X | X | X | X |
| Customize Navigation and Interface | X | X | X | X | X |
| Basic Customers | X | X | X | X | X |
| Additional Customer Contacts |  | X | X | X | X |
| Customer Logs/Notes | X | X | X | X | X |
| Customer Images |  | X | X | X | X |
| Customer Files/Content |  | X | X | X | X |
| Customer Accounts Receivable |  |  | X | X | X |
| Shopping Cart | X | X | X | X | X |
| Discounts | X | X | X | X | X |
| Loyalty Points | X | X | X | X | X |
| Gift Cards | X | X | X | X | X |
| Quotes | X | X | X | X | X |
| Quote Images | X | X | X | X | X |
| Invoices | X | X | X | X | X |
| Transition Invoices |  |  | X | X | X |
| Merchant Processing | X | X | X | X | X |
| Transfer Invoices |  | X | X | X | X |
| Internal Invoices |  |  | X | X | X |
| See list below… we ran out of time… maybe do this in Excel |  |  |  |  |  |

* For the features, we could add drill-downs or hoover popups to show more info, samples, or whatever. Make it nice. Adjust as needed (sort order and verbiage).
* For the list above, parent item, sub inventory, back orders, labels, reporting, payment solutions, ecommerce, customer purchase history, customer queues, photo management, content management, uploads (files and content), expense tracking, banks, financial services, payroll, paperless office, check writing, HR/employee options, timeclocks, forms, calendar, permissions, settings, functions of time, custom code, flex grid, flex attributes, cross corp, accounting, balance sheet, P&L, 12 main player groups, aggregates, quick search, exports, BI (business intelligence), data warehousing, histories, Emails, text messages, API sockets, etc.
* Remember – keyword – lite – focus there
* Free and basic levels – super simple – keep it simple for them
* Standard, pro, and enterprise levels – you can really play – really let customization and configuration play in here.