

Actions to be Taken

Paul

- Review/approve project synopsis (before next week)
- Take a look at Asana and feel free to contact team with questions

Team

- Submit approved synopsis upon receipt from Paul (by *due date* of next week)
- Send any questions regarding system config

Meeting Notes

Notes on Agenda.. in the future:

- include development diagrams, screencaps, etc.
- Include current/relevant sprint info (sub-sprint tasks and deliverables, etc)

Synopsis (due next week)

- Pending approval from Paul

Q&A

Who will maintain after we are done?

- **Paul** (hopefully little to no maintenance)
- “Refresh” for new fiscal year
 - Needs to hold ~15ish-month window (*sales tax*; refer to spreadsheet)
 - New calendar
 - transfer students

OS will be Windows machine

Spreadsheet explanation? (Student-centric; which parents track to students?)

- **TKD Data:** student information (as opposed to e.g. parent info)
 - *STUDENT NAME* - full student name (can get rid of this column)
 - *First Name, Last Name* - separated for mailing purposes (sort by last name)
 - *Email* - should be recommended field, not required; option of multiple email addresses
 - *OK to Email* - ignore
 - *Forms?* - old; can remove
 - *Age* - calculated field; current age
 - *Class* - likes having it because it allows to tag a person to a class; typically tied to age but should not be a calculated field because there are exceptions
 - Tiny Ninjas
 - Class 1 (5-7yrs)
 - Class 2 (8-12yrs)
 - Adult (13+)

- *MONTH columns* - How much each person has paid for tuition in each month
- *AVG* - "how much does it cost per year?"
- *ATTEND* - "how many of the 12 months did they actually attend?"
- Rows:
 - *Average Tuition* - how much per month on average tuition
 - *Income* - total monthly income
 - *Attendance* - redundant
- **TKD Chart**
 - Metrics: what does our income look like over time
 - *Attendance* - 1 for the month
 - monthly trends
 - wants a graph that shows attendance (overall, by student) for the last year
- **Cardio Data**
 - ignore everything past column E
 - used to generate email distribution list
 - wants to track attendance data in a manner consistent with other classes
- **Cardio Cards**
 - Serial numbers for cardio cards (financial/tax purposes):
 - Pay per class
 - 4-class (4####)
 - 8-class (8####)
 - Used to keep track of card sales
 - *Date* - date that the card was sold
 - Card price is manually entered; not stored
- **Self-Defense**
 - Attendance tracking
- **Women's Self-Defense**
 - Essentially used for tracking e-mail information
- **Other Income**
 - Special classes and events, etc.
- **Merchandise**
 - *Cost* - price paid to Paul
- **NYS Sales Tax Filing Data**
 - 3-month windows
 - Income tax: Jan-Dec
 - Sales Tax: also include Nov-Dec of previous year
- **Credit Card Income**
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