HIGHPOWER
D A T A   S O L U T I O N S

Work Order

Client: Milton Lewin, TheAllocatorNetwork.com
Date: **Tuesday, February 19, 2019**

Description of Problem/Need/Update/Change Request:

1. Test & finalize functionality,
2. Plus any additional requested changes as listed below

Work Steps to be taken:

1. Request Meet with Ben, to review FileMaker (1) (see attached page with notes & estimated time)
2. Requested items from mtg (9-12 hrs) (see p.3)
3. Upload current dev version of FM to AWS (1)
4. Finish requested Forums (they are connected to FM; adding in ability to add post & reply to post) (3)
5. Tutorial video of Forums (1)
6. Testing process of notifying other allocators of interest in funds (2)
7. Testing process of notifying other allocators of interest in strategies (0)
8. Testing the one-week followup email (0)
9. Request to Create calc to average the 'Would suggest' field (0)
10. Request to Adjust connecting email to include Allocators Bio as well as name (1)
11. Request to Change login from UN to Email address (1)
12. Request to Add 'forgot pw' feature for users who forget their PW (1 web; 1 FM)
13. Request to change the links on Terms of Service & Privacy Policy pages (1)

Estimated Hours / Cost: 22-24 hours;
(If you want to just prioritize some of these to save hours, let us know which ones you would like us to focus upon.)

Payment Plan: Upwork

NOTE: All work is billed by the hour. We do not do fixed price projects. Any estimate you see here is based on what we know at the time, and is not a binding estimate. If the work takes more time than anticipated, it will cost more. This is why we ask for your approval below, should the work take longer.

Your Approval:
(Please select one)
All estimates are non-binding best-guesses based upon what we know at the time of the work order. If the task takes longer than the estimate, how do you want us to handle it: (please choose one)

1. Hard Stop at a certain dollar or hours amount: _____

2. Flexible Range, if the job takes longer: _____
3. Call first
4. Just Get the Job Done, and bill me for the rest.

_____
Client Name

_____   _____
Client Signature   Date

Meeting Notes, Feb. 19th, 2019 w/ Milton & Ben

Changes — estimated time 1 hr.

- My Funds page - column with rating change "Would Suggest" to "Would Recommend"
- Shrink columns, such as Approx AUM (8 characters)
- Approx AUM should format to $mm
- Fund count not updating
- Refresh value list for names
- When sending email to all allocators, BCC emails

New Requests — estimated time 7-10 hours

- Add check "select all" on user list for email
- Add Show All in navigation scripts
- Add User Detail page to FileMaker
- Add username to view on FileMaker
- When a user "deletes" a fund from "My Funds" - move to different section and show only fund name
- Change Activate and Read Only checkboxes to one or the other, not both
- Log emails between users (sent and received) and create display pages
- Filter out duplicate emails for connection emails (user already had "want more information" checked, new user checks "willing to share")
- Sort by columns on list views

Ask Joe — estimated time 1 hr.

- Auto log out after 15 minutes of inactivity
- When Milton deactivates a user, lock the site
- Ask Joe about formatting text from FM fields to WP (such as font, bold, italics, etc.)
- New user default - if not activated and not read only, can't access my funds, my strategies, connecting, or member strategies.