

Rent Blaze

5/3/2023 Notes

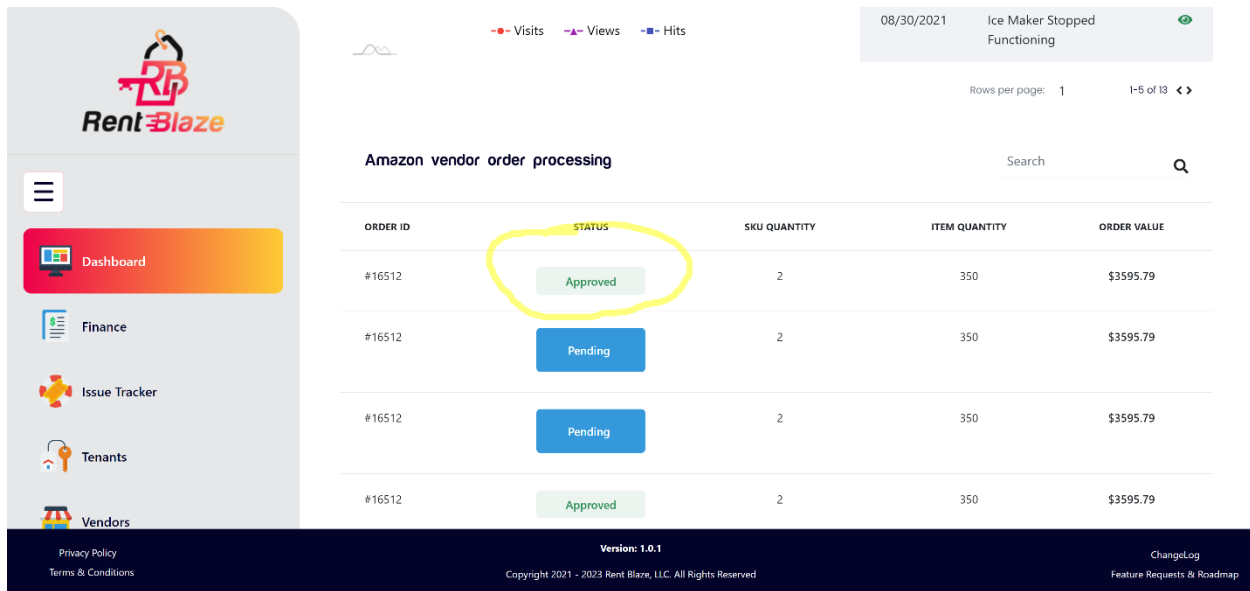
I used **ORANGE** font color for notes that were mentioned in previous notes.

Thank you so much for your work thus far. Ost of these notes are simple text/label/etc. changes. It really seem to be almost complete!

General:

1. The menu items that have submenus are still off in the collapsed view and the submenus don't show.
2. Can you use the button style for all the buttons of the forms? A lot of them still have the old style. Maybe form buttons would be a different color and the "Blue" ones would be the main buttons?
3. I know there are still some general dashboard design tweaks mentioned in the comments on <https://trello.com/c/hDrOMBGO> that haven't been implemented yet.
4. There are design/graphical issues with a resolution of 3840x2160 and above as well as for tablets/smartphones. It was mentioned that this will be fixed with the responsive design fix update.
5. Limited HTML Editor and Image Upload/Font Size Options missing for Full HTML Editor – I know this is something we are going to look at later.
6. Country" (of list of countries) drop down in before the State, and then that would allow the "State/Province" to be an autogenerated Drop Down. This would be for all address entries.
7. Footer is behaving/looking differently on different pages. The style I would like the footer to be is what is seen on the Units link – where it fades into place at the bottom once the screen is scrolled down. HOWEVER, I don't want it to overlap the content so there needs to be a margin at the bottom of the page's content to account for the footer fading in so no content is being covered. The Footer on the Unit's page has sample "Lorem ipsum" text that needs to also be deleted. This should then be the same footer throughout the site.
8. Date fields need to be bigger or less padding inside, the year gets cut off once a date is selected. Also, when the Date Picker selection to change the year is selected, there is no way to get back to the date picker calendar without exiting it – so the "day" field can't be chosen without having to re-enter the date picker.

9. For the tables, can you use the style that is on the dashboard sample table for how the Active/Inactive (and all table statuses) look (still would want them in Capital Letters though)? It is a bit more modern:



08/30/2021 Ice Maker Stopped Functioning

Rows per page: 1 1-5 of 13 <>

Amazon vendor order processing Search

ORDER ID	STATUS	SKU QUANTITY	ITEM QUANTITY	ORDER VALUE
#16512	Approved	2	350	\$3595.79
#16512	Pending	2	350	\$3595.79
#16512	Pending	2	350	\$3595.79
#16512	Approved	2	350	\$3595.79

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10. Uploads seem to take a bit of time- is it possible to add a progress bar so user knows something is “happening”? It does look like a wheel was added...down the line I would like to integrate a more unique or custom loading screen:
<https://trello.com/c/w9SU5a3G>
11. When a CSV or PDF download occurs – can the name of the downloaded file be relative to what the download is? Right now it is something generic like data.pdf
12. For all the tables: Columns are all same width - would like some to be more narrow if the content doesn’t take up entire space. This will help eliminate some of the horizontal scrolling to see info. Some of the columns cut off important info like a date or phone number, so would want them to be able to at least show full dates/phone numbers/emails/websites/names Can the table allow the user to adjust the width to their desired width and save that?
13. In the Original site plans a “Scroll to “Top” arrow should appear when one scrolls down the page a decent amount. This doesn’t have to be done right now, but I wanted to mention it again in case it is easier to implement earlier than later as this would be on all pages of the portal. If it is possible to use a custom graphic, I could put the arrow in the “Rent Blaze” ticket to complement branding.
14. Account Switcher should always show what Account they are on (instead of “Select” being shown).
15. For form fields I would like the CSS tweaked a bit as it is difficult to distinguish from “suggested text” and text that has been inputted (they appear to all be the same color).
16. Thanks for adding the “Submit Button” at the bottom of each tab for the “Add/Edit” part of the modules. Can you change the label to “Save Information”. I do worry about the

- button being missed/not distinguished from the other buttons of the form. As mentioned in one of the general notes above, if the buttons in the forms could be a different color, that would help. I am thinking maybe a teal/turquoise for buttons in the form? If the “Save Information” could either be centered or on the right I appreciate it!
17. When a phone Number or currency is entered, it doesn’t get auto-formatted.
E-mail/website/Number fields have no validation.
 18. It seems that the “Multiple Picture Upload” and “Multiple File Upload” are mixed. For the file upload it is suppose to be the Folder Structure with the Templates that you were making (<https://trello.com/c/Udt2rmUV>), but it seems like you have that for the picture uploads. Picture uploads were suppose to upload/display like a mini gallery with the ability to choose the “cover picture” and move the picture order around/delete pics/give a title/caption. While this might change with the right structure for the files, Currently: It seems when I upload a file, I can’t change the name (it does seem to show that field). If I upload a second file, it seems to replace, not add to, the existing uploaded file. I would rather work on getting on of the picture and file upload areas to work and look perfectly before applying the same to all.
 19. Minus/Plus for entry selection boxes missing on “Link” pages: there should be a plus/minus to make the check boxes appear/disappear so that it isn’t taking up width for the table if they aren’t needed in view. If this is not possible, then we can go without.
 20. Interactions Tool General Issues:
 - a. Date Picker not letting me select today’s date (and issues with other dates It isn’t letting me select May 1st in the date picker – it goes to April 30th.)
 - b. “Other” selection should just show a text field – **not** a wysiwyg editor to type what the “Other” Interaction is
 - c. For the table: Would need a column with a checkmark if there are uploaded files.
 - d. For the table: Seems to show interactions in order of entry – would like table to display them in order of date/time of the interaction with the newest first (and ability to sort by columns ascending/descending) (Date format should also be what is set in Owner’s system settings).
 - e. “View” should be pop up vs. the form.
 - f. When a new interaction is “Added” the form does not load as blank, but has data from previous entry inserted.

Properties:

Properties Link:

1. For the warning to Activate Messages, it should be: “This will **Activate** the Property/Properties. Do you want to proceed?” (bold is what is wrong in portal)

2. For the “warning” for bulk inactive can it read: “This will **Inactivate** the Property/Properties. Do you want to proceed?” (bold is what is wrong in portal)
3. Bulk Delete Property
4. Appreciate the 1 search box – but it seems to only be connected to the Property Column vs. all the columns?
5. Lower Summary doesn’t seem connected with table info.
6. Active/Inactive should be own column (right before the “Actions” column)
7. Download CSV/PDF icons too big
8. Because it gets cut off, I can’t tell if Address Line 1 and 2 are both being shown?
9. Downloading CSV/PDF (and in bulk actions) only gives ID (which seems like the MySQL ID which shouldn’t be shown) and the Property Type and Status. It should show the information from the table (both hidden and shown columns).

Properties Add/Edit:

1. Dark Mode CSS needs adjusting for the “tabs” of the form and HR (can’t read other tabs or see HR).
2. “Add a Property” is not in the Logo font
3. Tooltips would still need to be incorporated (they are located here: <https://trello.com/c/K1KPQsNc>)

Property Information:

1. The “Fee” and “Deposit” for the Property Locations should have a currency input vs number input.
2. Owner (they can always reserve a location since they own the place), Owner-Unlimited (this is just an Owner Account with an unlimited plan), Renter, Co-Tenant (since they are Tenants), Issue Tracker Staff, should all be removed from the “BY” for the Property Reservations. The list should only be user roles under OWNER: Customer (this is a role coming in a later module), Property Manager, Prospect, Staff, Tenant, Vendor

Notifications:

1. The “History” of the Property Notifications would be under the HR. The “Post Now” or “Post Later” Buttons are what would save/send the notification. Once the “Post Now” is clicked or “Post Later” is scheduled (instead of “Close” the button should be labeled “Schedule”, the notification is sent/scheduled. It should then show as a table underneath with the Date/Time it is posted/scheduled, so we really don’t need the “Save” button.
2. The “View” for a scheduled/sent notification should just display the notification in a pop-up – not in a form.

3. Once a notification has been posted it cannot be deleted/edited (only those scheduled for later can).

Boards:

1. View Board should be a pop up with the board (rendering the html output), not just the form. The edit should load in the form which it does. There still needs to be a way to move up and down the board order in the table of boards.

Property Notes and Files:

1. See General Notes #19
2. Can you give me a quote for this (this wouldn't be something that would effect the June 15th date for me and can be done after...for all the "Notes fields" (this would be for current and future modules, not just the "Properties" Module), I am thinking of converting it from the single HTML editor to the ability to add multiple notes (similar to the Interactions) where they would Add a Note and it would give them the option of a Title and the full html editor, then it would save it in a table that also would list the date the note was last updated. This would provide a bit more versatility to the Note fields...of course there would still be different Note types: Public, Staff, Tenant, Private...Can you please give me a quote on this?

Property Assistance Information:

1. First name is appearing as Last Name and Last Name is appearing as First Name in the tables under the Property Assistance and Security Information.

Property Measurements:

1. The "Quick Add" button for the "Type" gives a field with suggested text of "Jhon", this should be a instead something like "Wall"...I wanted to make sure this "Quick Add" is working? It is a way to quickly add a Type into the Owner Editable list directly from here (it would then save in the Owner Editable list). Is this working?
2. On the table it is important the entire "Measurements" column be shown – this can't be cut off as it would defeat the purpose of being able to look at the table quickly.
3. When a measurement is deleted and then the "Add Measurement" is selected, it is loading the previously deleted measurement's data in the form.
4. CSV/PDF download icons are too big

Materials: – this will be replaced with the v2 so ok with how it is now. Though the header/icon is missing.

Parking Spaces:

1. Bulk is mostly working, but it is not giving the created spaces the names. They appear as blank on the table.
2. Great seeing the table when a space is added! Couple things on that:
3. Download CSV/PDF doesn't show the "assignee"
4. Prefix/suffix (if selected) should be part of the space name once added (Example: S105G)
5. ~~Instead of the "1" listed if a space is Compact, Tandem, Handicap, or EV can it be a checkmark?~~ Love the "x" and checkmarks. Can the "x's" be red and the checkmarks be green?
6. Summary above table has a "A" for "UnAssigned" it should be "Unassigned"
7. "Show/Filter" Option missing
8. Bulk Actions of: UNASSIGN Spaces missing
9. Actions are missing. Currently all spaces are UNASSIGNED, it should show the "ASSIGN" Action/icon vs. the UNASSIGN one. For spaces assigned to a Tenant or a Unit then the "UNASSIGN" would appear instead.
10. "VIEW" would show the space and their assigned history (Assign history missing, still would prefer it not looking like the form)

Listing Information:

1. Property Embed – suggested text should be a sample embed code (like an iframe)

HOA Information:

1. For the label for the "Save" button after a contact could you have the label be "Save Contact"
2. Can the HR be above the "Add Contact" button and one below the table (above the Interactions) icon to separate the contacts and Interactions more?

Mortgage Information:

1. Fields: Mortgage Minimum Payment, Due Date, Mortgage Balance were deleted with the contacts/interactions update...those should still be on the form, after the Interactions tool, above the Mortgage Notes (Mortgage files also missing) – the template I did for the Contact/Interactions update was just showing where to insert these, so I didn't add all the fields after the Interactions tool.
2. For the label for the "Save" button after a contact could you have the label be "Save Contact"
3. Can the HR be above the "Add Contact" button and one below the table (above the Interactions) icon to separate the contacts and Interactions more?

Builder:

1. Fields: Builder Files/Builder Notes were deleted with the contacts/interactions update...those should still be on the form, after the Interactions tool – the template I did for the Contact/Interactions update was just showing where to insert these, so I didn't add all the fields after the Interactions tool.
2. For the label for the "Save" button after a contact could you have the label be "Save Contact"
3. Can the HR be above the "Add Contact" button and one below the table (above the Interactions) icon to separate the contacts and Interactions more?

Payment Information:**Staff:****Properties View:**

1. The "View" mode should only show fields that have information entered into them. There will be a lot of fields in the "Add/Edit" form that would be blank – those would not show in the "View" mode. Really don't want it looking like a "locked" version of the edit form, it should list/display the fields/data that have info in it. This has been mentioned several times, so unsure if there are questions/clarifications needed on this/that I am not explaining it well? I will make a sample of this so you can see what I am looking for.
2. This will likely need to be an add-on, but I would like a tab in the "View" mode to display the "Property History" a history of the Property's Maintenance Tickets.

Units:**Units Link:**

1. For the table, can the column be "Issues" not "Issue"
2. Active/Inactive Status – my apologies on the back and forth with this as I keep mentioning different things to you and I know that the confusion is mine to blame. It has been awhile since I first templated out this module so I am trying to remember how I envisioned it. I know I told you different things

regarding the Active/Inactive. It probably is wise to keep an Active/Inactive Status. If, like the Properties, can this be in a column on its own before the "Actions". For the Current "Status" can that be called "Stage" and we will keep that as the options: Vacant, Prepping, Moving Out, Rented - I don't know if it is possible, but if the Unit status is "Inactive" can that make the "Stage" also "Inactive"? Can the different "Stages" be added to the "Filter"?

3. Bulk Active and Inactive - For the warning message can it be: "This will **Inactivate** the Unit(s). Do you want to proceed?" and for the "Active" warning message: "This will **Activate** the Unit(s). Do you want to proceed?" *Word that is wrong is in bold.*
4. "Issue" Column should be "Issues"
5. Bottom Summary: "Total Monthly Income" Should be total "Monthly Rent" of all Active Units in the "Rented" and "Moving Out" Stages. "Total Anticipated Monthly Income" should be the total "Monthly Rent" of all Active Units regardless of their stage.
6. Is the search box connected to all columns? Seems to only work for Unit Name?
7. This might need to be an add-on as it isn't in the original PDF, I am wondering if there is a way to do a quick "rename" of Unit names on this page...**REASONING:** someone creates 100 duplicate Units, it will take a lot more time to hit the edit and save button for each one. I am wondering if we can be able to either 1) double click the unit name on the table and have them inline edit the name -OR- 2) on the duplicate unit form have a toggle to "Name Units Now" and it would list all the units that would be created (if they type 100 copies of the unit then 100 fields are created) where they can name them there and then hit save and the system would name them as it creates them...what do you think?

Units Add/Edit:

1. Dark Mode CSS needs adjusting for the "tabs" of the form and HR (can't read other tabs or see HR).
2. "Add a Unit" is not in the Logo font
3. Tooltips would still need to be incorporated (I need to create those still).

General Information:

1. Now that the "Status" and "Stage" have been determined/clarified, can you change the label on the dropdown from "Status" to Stage".
2. Bathrooms – *Can you Add:* first selection of the Drop Down to be "Shared"

3. Assign Parking Space Toggle and Space Dropdown seem to have been deleted when you added in the Unit Locations? These fields should be above the Unit Locations. Here were notes that were left over from those fields:
 - i. Parking Spaces should show the ones for the Property that is selected. I tried adding in a spot on one of the Properties, but the new space doesn't show as a selection when that Property is chosen.

Unit Notifications:

1. The "History" of the Property Notifications would be under the HR. The "Post Now" or "Post Later" Buttons are what would save/send the notification. Once the "Post Now" is clicked or "Post Later" is scheduled (instead of "Close" the button should be labeled "Schedule", the notification is sent/scheduled. It should then show as a table underneath with the Date/Time it is posted/scheduled, so we really don't need the "Save" button.
2. The "View" for a scheduled/sent notification should just display the notification in a pop-up – not in a form.
3. Once a notification has been posted it cannot be deleted/edited (only those scheduled for later can).

Unit Boards:

1. View Board should be a pop up with the board (rendering the html output), not just the form. The edit should load in the form which it does. There still needs to be a way to move up and down the board order in the table of boards.

Unit Notes and Files:

1. See notes under "Property Notes and Files"

Unit Measurements:

1. The "Quick Add" button for the "Type" gives a field with suggested text of "Jhon", this should be a instead something like "Wall"...I wanted to make sure this "Quick Add" is working? It is a way to quickly add a Type into the Owner Editable list directly from here (it would then save in the Owner Editable list). Is this working?
2. On the table it is important the entire "Measurements" column be shown – this can't be cut off as it would defeat the purpose of being able to look at the table quickly.
3. When a measurement is deleted and then the "Add Measurement" is selected, it is loading the previously deleted measurement's data in the form.

4. CSV/PDF download icons are too big

Unit Materials: – This will be updated in v2 so fine keeping as is for now.

Listing Information:

1. Last Month's Rent "Toggle" should NOT be a required field.
2. "LGBTQ + Friendly" label has an extra space after the "Q". It should be: "LGBTQ+ Friendly"
3. Unit Embed suggested text should be a piece of code (like an iframe)

Unit View

1. This will be the information that is entered in the "Add/Edit" form. There would be an "Edit" button on this page to take them to the Edit form.
2. This will likely need to be an add-on, but I would like a tab in the "View" mode to display the "Unit History" showing past tenants (hyperlinked) with their Lease Start – Lease End and their monthly rent/reason for move out and a history of the Unit's Maintenance Tickets.

Tenants:

Tenant Account:

1. This is using the Admin Dashboard color scheme – it should be the Customer Users color scheme.

Tenant Account: Tenant Profile

1. "Tenant Profile" isn't in the Logo font.
2. I want to be able to test to see if a tenant updates their info, if it updates on the Owner side. I know we don't have a lease to connect a Tenant and an Owner yet, but is there a temp connection we can do for testing? Is this what you have set up for the impersonation one?

Tenant Profile:

1. Address fields are repeated 4x

Listing Information:

1. Toggle is graphically off

2. Areas – these should be “tags” not a drop down...not sure if this is implemented – but they should be able to tag cities/zip codes.
3. Bathrooms – can you add “Shared” as the first option?
4. Label “LGBTQ + Friendly:” should be: “LGBTQ+ Friendly:”
5. Desired Features should show the different features that is in the Super Admin Unit Features AND Property Features lists.
6. From the Tenant-Edit (Tenant Side) Pdf: I would like them to be able to verify themselves through Linked in, Instagram, Google, and Facebook. Not seeing options for this/what we need to do for this?

Emergency Information:

1. See Emergency Information under the “Owner Account: Tenant Add/Edit” section.

Notes and Files:

1. I just want to confirm these are the public/Tenant Notes and Files that are shown?

Employment:

1. See Employment under the “Owner Account: Tenant Add/Edit” section.

References:

1. See References under the “Owner Account: Tenant Add/Edit” section.

Children:

1. FILES AND NOTES would only show in the “VIEW” Mode and are the Child’s Public Files and Notes from OWNER. TENANT Cannot edit them.

Pets:

1. I do need to confirm the editable list with required shots is working to fully test this out.
2. FILES AND NOTES would only show in the “VIEW” Mode and are the Pet’s Public Files and Notes from OWNER. TENANT Cannot edit them.

Others Living with You:

1. Status should be “Pending” until Owner Approves
2. Birthday counter missing from table.

Vehicles:

1. This form is showing the “Models”, but there are a ton of duplicates. It doesn’t seem to be the same as in the Owner form?

Owner Account: Tenants Link

1. Impersonation – this looks good, can the icon be to the direct left of the “You Are Currently Impersonating...” Message? It looks odd being on the far left away from the message. Can we make the “END” button red?
2. Bulk Active and Inactive - For the “warning” for bulk inactive can it read: “This will **Inactivate** the Prospect(s). Do you want to proceed?” For the Active Messages: “This will **Activate** the Property/Properties. Do you want to proceed?” *Wrong words are in bold.*
3. If I have the filter set to Prospects, when I do a bulk action it brings the table back to no filter even though the filter is still shown as prospects. To get back, I have to switch the filter back to All, then switch it back to Prospects.
4. E-mails should be hyperlinked in the table
5. Summary Below Table: the “Total Monthly Incoming Rent” is the total “Monthly Rent” of all Active Tenants. Can that be on the first line then the tenants/prospects below that? The summary box looks odd as there is a huge space above the tenants.
6. Type Icon is too large – it is overwhelming , needs to be about 2/3rd – ½ the size so it fits nicely in the column without being the full height of the column.
7. Is the search box connected to more than the Tenant Name?
8. Birthday Countdown missing in the Date of Birth Field.

Owner Account: Tenant Add/Edit

1. Dark Mode CSS needs adjusting for the “tabs” of the form and HR (can’t read other tabs or see HR).
2. “Add a Tenant” header is not in logo font
3. Tooltips would still need to be incorporated (I need to create those still).

General Information:

1. Prefix/Suffix should have as the first option a blank in case they do not want to list that.
2. Doesn’t look like suggested text notes were implemented in this module?
3. DLN/ID Issue State should also have the list of countries selection first (like for the addresses).
4. There is a stray HR at the bottom

Emergency Information:

1. Can you do what you did on another form and have the “Add an Emergency Contact” Button, when that is pressed the form appears with a “Save” at the bottom? That way the form isn’t always shown? I like that look better like you have on a different module.
2. When I add in a contact listed as a “Parent” from the drop down and save it, the “Parent” doesn’t show in the table. The other drop downs do show. When I go back and “edit it” it didn’t list “Parent” in the drop down, but “Sibling” (guessing this is because I added a sibling contact as well). When I switched it to “Parent” and hit saved, it then showed “Parent” in the table.
3. Address Line 1 Shouldn’t be a required field. Only required fields should be First and Last Name.
4. When the “View” is clicked as the option for the contact, I would rather it show the info for that contact in a pop-up vs. loading in the form. The “Edit” should load it in the form (as it does).
5. Is it possible to add an “Add a Picture” field for the Emergency Contacts? I am thinking I just needs to be one not a whole gallery (but if multiple are easier to do that is ok as well). E-mail field would also be helpful.
6. CSV/PDF download icons are too big

Tenant Notifications:

1. See Notes under “Property Notifications”

Tenant Notes and Files:

1. See notes under “Property Notes and Files”

Interactions:

1. See General Interaction Notes

Keys:

1. “Date Given” and “Key” should be required fields.
2. Verification:
 - a. missing the “info text”
 - b. Hoping to still have the browser’s “Camera Permissions” icon deactivate after the verification screen is exited.
 - c. “Capture Photo” button seems to activate camera – but can there be a button to “Take Picture” right now the pic seems to capture upon save.
 - d. Once a Verification is added, it would be helpful to list the date/time or a “Checkmark” next to the “Add Verification Button” so it can be seen that something was added. Right now, it just returns to the form with nothing to signify that the verification was saved.

3. "Additional Fees" Suggested text should be something like: \$25 (with currency symbol based on Owner Settings). Not a number selector.
4. Upload files don't let me edit the file name – a random name appears for all the files uploaded. Also, if 3 files are uploaded they are cut off on the display.
5. "Verification Seal" missing in table when verified for given or returned.
6. Description "tooltip" missing after the Key Name in Table.
7. Would prefer "View" to be in a pop-up vs. loading in the form. The Verification information/pic would also show in the pop-up.
8. When a new key is "Added" the form does not load as blank, but has data from previous entry inserted.

Loanable Items:

1. "Date Given" and "Item" should be required fields.
2. "Add Given Pictures", the pictures uploaded show after the "Add Verification button" instead of below the "Add Given Pictures" Button.
3. "Lost, Damaged, or Destroyed:" Drop down needs to be wider as it is cut-off.
4. Verification:
 - a. missing the "info text"
 - b. Hoping to still have the browser's "Camera Permissions" icon deactivate after the verification screen is exited.
 - c. "Capture Photo" button seems to activate camera – but can there be a button to "Take Picture" right now the pic seems to capture upon save.
 - d. Once a Verification is added, it would be helpful to list the date/time or a "Checkmark" next to the "Add Verification Button" so it can be seen that something was added. Right now, it just returns to the form with nothing to signify that the verification was saved.
5. Upload files don't let me edit the file name – a random name appears for all the files uploaded. Also, if 3 files are uploaded they are cut off on the display.
6. Serial Number is not showing in table, even when it loaded in the form.
7. "Verification Seal" missing in table when verified for given or returned.
8. Description "tooltip" missing after the Key Name in Table.
9. Would prefer "View" to be in a pop-up vs. loading in the form. The Verification information/pic would also show in the pop-up.
10. When a new item is "Added" the form does not load as blank, but has data from previous entry inserted.

Vehicles:

1. Thanks – it looks like you have the "Makes" alpha sorted which I appreciated, but now, no "Models" are coming up? Also, the selected year is cut off after it is selected, so the field size needs to be increased.

2. Curious how this is working backend – is this from the Kelly BlueBook API or the imported CSV? How will this work in future for updating?
3. Parking Space would need to be connected to ones of Property/Unit that Tenant is attached to via the Lease – this won't happen until the Lease Module is complete. Right now the Toggle throws a page error.
4. Can't fully test the table right now as I have no model of cars to save.

Children:

1. Would prefer "View" to be in a pop-up vs. loading in the form.
2. CSV/PDF Download buttons are too big.
3. Birthday Countdown missing from Date of Birth Table Column
4. Date Format should be from Owner Settings.

Pets:

1. Need to make sure the Owner Editable list for the Pet Types is activated (see <https://notes.saviodesigns.com/l/Ew217P>). Until this part is done, I can't tell if the "Shots" section is working the way the details state.
2. No warnings are given when "required fields" are not entered – the form still saves (guessing this might be true on other forms).
3. Would prefer "View" to be in a pop-up vs. loading in the form.
4. CSV/PDF Download buttons are too big.

Others Living:

1. "First Name" and "Last Name" should be required fields.
2. Gender Drop Down should say "Prefer not to Say" instead of "No Preference"
3. Relationship Other should pull up a text field, not a wysiwyg editor to list the other relationship.
4. "Additional Deposit" and "Additional Rent" suggested text should be something like \$25 (with the currency updating based on Owner Setting). Not a number selector.
5. Would prefer "View" to be in a pop-up vs. loading in the form.
6. CSV/PDF Download buttons are too big.
7. Birthday Countdown missing from Date of Birth Table Column
8. Date Format should be from Owner Settings.

Employment:

1. Can "Add Another" button be "Add Employment"
2. Start Year/End Year – I see you added 2023 (thx!), but is this set to automatically add the new years once the next year hits?
3. "Annual Salary" suggested text should be something like \$50,000 (with the currency updating based on Owner Setting).

4. "Present" Option doesn't seem to save for End Year in table.
5. Would prefer "View" to be in a pop-up vs. loading in the form.
6. CSV/PDF Download buttons are too big.
7. No way to sort by table columns ascending/descending
8. Reference Notes aren't shown in the table

References:

1. Can "Add Another" button be "Add Reference"
2. Can you add an "Email" field above the number fields and in table before the Number 1?
3. Relationship Other should pull up a text field, not a wysiwyg editor to list the other relationship.
4. Would prefer "View" to be in a pop-up vs. loading in the form.
5. CSV/PDF Download buttons are too big.
6. Reference Notes aren't shown in the table and aren't saved – so when edited they are lost.

Owner Account: Tenant View

1. This will be the information that is entered in the "Add/Edit" form. There would be an "Edit" button on this page to take them to the Edit form. Please note as in the Link PDF: Under the "VIEW TENANT" they should also be able to click a button to "SEE TENANT DETAILS HISTORY" which would show the old entries for the Tenant Information (this is the information that is not overwritten).

Admin Editable Lists:

1. I do like how these look! I know the rest still need to be added/integrated. For the grey/blue background, is it possible not to have the white margin on the sides and bottom? I was hoping the color would extend all the way to the bottom and to the two sides.
2. Can you make sure the lists names are in alphabetical order grouped by category (General Category First). The document with all the lists should help tremendously in that.
3. The line you have separating the different categories, can that be a lighter color vs. black – it is a little too bold, but I do like the separation.