

Weekly Call Agenda + Call Notes

8.29.2018

12 p.m.CST/1 p.m. EST

Attendance - Mike @ Steel Pony, Diane @ Riehm, Steve @ Cooper, Sarah @ Flying Plow, Arlin @ Summers Gold, John @ Jade Family Farm, Allie @ Strike Farm, Curtis @ Millsap
Staff - Stefanie, Julie, Mike, Simon

This Week's Recorded Call: [8.29.18 Video](#)

8.29 Agenda

Mike Cuccaro will join us!

1. Discuss recent development updates: **full update below**
2. Overview of new email template: **all farms are on the new email template**
3. Discussion on how to best utilize farm happenings and user generated tips to get the most out of it for your members!
 - a. **How to decide if information should go in a Farm Happening, a Product Tip, or an additional Email**
 - i. General announcement that a new product is available: Farm Happening.
 - ii. Information just related to a particular product's quality that week: Product Tip.
 - iii. Important info about a drop location: Email.)
 - b. **Think members aren't clicking through to read your Farm Happening from the email? Suggestions on how to formulate the lead-in sentence**
 - i. If you want to make an update to an existing happening, just add "UPDATE:...." to the top. This would work well if you have a storm over the weekend and want to update customers on how that affected customers.
 - c. **Have a particular note about a product in this delivery? Create a one-time tip and only the people getting that product will see the note and only for this delivery.** We will demonstrate.
 - d. www.harvie.farm/happenings to get ideas of what other farms are doing.

Development Update:

Improved Email Design - Please see attached image. We've been soft-launching it with a few farms and will switch everyone over to it by the end of the month. We've gotten good feedback so far and will be making some minor tweaks, like increasing the preview size of the Farm Happening.

Member Action Logging - An invaluable tool with Member Assembler, this will really help to support customers when something goes wrong by seeing what actions they'd taken. We'll be improving and adding logs as we go. For instance, right now it just says if a member edited their share but not the exact details. You can view each member's logs as a tab under the member.

Delivery Route Exports - For farms doing home delivery, we've created an export tool to work with RoadWarrior software, an inexpensive app that your drivers can get the best directions from house to house, mark when delivery made, etc. Plus, if you are doing home delivery there is now a new Delivery Note you can create just for those long details of home delivery like building codes, door instructions, dog warnings, etc. that don't fit on a label. Edit a Member to see this option.

Delivery Creation Improvements

Override a new image for a product by delivery. We know how different winter squash can be. It's hard to tell someone they're getting acorns with a picture of a spaghetti! Click the image icon next to each delivery product to upload a delivery image override.

Be able to add or remove Extras after a customization window is opened. Change in plans? You can deal with that. Edit Extras on a delivery to check it out.

Auto-fill inventory. Just click one button to fill all the needed inventory on a delivery finalization. If you don't like going product by product, click Finalize and it will give you the option to auto-fill what's needed.