**Email Date 11-Oct-2024:**

1. Can we please change the above picture and verbiage so that it is related to credit repair. **See above.** - Done
2. My information is still showing on the agreement. Name, address, etc. It needs to be the client's information. **See above**. - Done
3. Messages section still does not seem to be functional. I need the client to be able to directly message the person assigned to their account. - Done
4. I would like to remove all of these report providers. The only report provider that shows should be CRX Hero and Other.**See above** - Done
5. I would like to remove plans from showing on thr homescreen and make it a seperate page when selected from the top menu. - Done
6. Client should actually be written as Clients - Done
7. Testtimonial : This section needs to be tailored to credit repair. Please change. - Done

**Email Date 17-Oct-2024:**

1. To access the client or affiliate portal in Credit Repair Cloud, navigate to "My Company" and then select "Client/Affiliate Portal." This will provide the option to "View My Client Portal." -Under Development

**Email Date 21-Oct-2024:**

1. There is a typo here. Remve the word "legal" and replace it with entire - Done
2. I would like to be able to edit who the client was referred by. Please make this field editable – Done. You can scroll the list then you can edit it.
3. This needs to be a CRX Hero Invite. Image needs to changes as well to reflect CRX Hero. The automated message that is sent to the client should also reflect that it is coming from [Info@thecreditrepairxperts.com](mailto:Info@thecreditrepairxperts.com) and the it is for CRX Hero. – Image is now changed. [Info@thecreditrepairxperts.com](mailto:Info@thecreditrepairxperts.com) this Email will be changed when the project will be shifted to yours domain. Currently it will not work as it needs the same domain.
4. My company tab. My team members. Under the Role selection. When you select Admin it doesn't change it stays at employee. - Done
5. After making the changes, there is no save button (Roles and Permissions section) . – Done. I have added some new features. You can select all at a time or select all per section or you can select one by one. Update button also added.
6. The invoice section should be removed. - Done
7. This assigned to section doesnt need to be on the affiliate portal.  Also the "portal acess" selection does not work at the bottom of the screen. -Assigned to section is removed now.
8. This is the confirmation email I receive when creating an affiliate portal and adding a user. It says SquareOne when it should say The Credit Repair Xperts. The Credit Repai Xperts Team etc..... - Done
9. When a new client is added. The welcome email sent to them comes from your gmail acount. It needs to come from The Credit Repair Xperts main email address. [Info@thecreditrepairxperts.com](mailto:Info@thecreditrepairxperts.com) - This Email will be changed when the project will be shifted to yours domain. Currently it will not work as it needs the same domain.
10. On Step 2 of the CRX Hero signup where you enter username. It should say username should be your email address. -Done
11. On CRX Hero step 3 doesnt work it just loads. It is now done. The system is currently in testing mode, accepting only test details. Please reach out to Stitch Credit API support to transition it to live mode.

fname => GERTRUDE

lname => HARKENREADEO

mobile => 5555551222

ssn => 666458856

dob => 1967-06-08

address=> 305 LINDEN AV

city => ATLANTA

state => GA

zip => 30316

**TestingLink:** <https://team20.in/credit_repair_xperts/creditheroscore/sign-up>

You can test using the existing details. Only the email needs to change for each signup attempt. For example, use emails like `testing+0020@test.com`, `testing+0021@test.com`, etc., starting from 20, as previous emails are already registered.

Additionally, I need UI from Stitch Credit API support to display results from all bureaus. Currently, results are shown in table and PDF formats.

The system will accept only one testing amount within a 24-hour period. For example, if the current testing amount is $21.50, no additional testing transactions of the same amount will be accepted until 24 hours have passed. However, a different amount can be tested within the same 24-hour period.

Testing Card Details:

Card Number: 4111111111111111

Exp date : 1025

cvc: 999

You can log into the dashboard using the provided testing credentials. Once live mode is activated, you will receive new credentials via email for every signup.

1. The client search function doesnt work properly. When I type in Ronald. Not all the ronalds pop up. For instance I was searching myself and when I typed in my full name it still didnt show. I had to search for it using the next page. – Done. Now you can search using First Name and Last Name. Also it will show matching results
2. In client profile remove the invoice section. -Done
3. Client Portal : The invoices section should be changed to be a My Bills section. Where a person can go in enter the name of bill, the due date, the amount of bill, balance. Under Development
4. Remove the my finances section - Done
5. In the message section. After you send your message it doesn't save. It should save in chat history. You should be able to see the entire thread and message exchange between parties. It is working fine. All messages will remains there until you delete.
6. Simple Audit Template -Done

**Email Date 24-Oct-2024:**

1. The Invite needs to be to CRX Hero. We need to be able to send users the link to CRX hero. **See above.** -Done
2. Signed Agreement and CRX Hero need to be on this checked list. When a client completes we need to be notified and it needs to be checked off. – Under Development
3. I tried to add a user account. However, once I added information nothing happened. I did not receiive anything in my email. Also each employee will need to be able to login and service clients. Every interaction in the system should be noted as to who performed what task so that the team can see. For example, when putting something on the calendar or leaving an internal note. **See above.** -Done
4. There is an error with the recent activity log. **See above.** -Done
5. Can I get a drop down menu here showing the different credit bureaus that makes the address fields pre populate once selected. – Under Development
6. How can I check cloud mail functions? – Under Development

**Email Date 04-Nov-2024:**

1. search Bar Functionality: When typing a client's name, it redirects to the edit profile instead of the overall file. -Done
2. Client Status Visibility: The client tab does not indicate if a client is set as a lead or active client. -Done
3. Navigation After Messaging: After sending a message to a client, returning to the file redirects to the home tab instead of the specific client’s profile. -Done
4. Task Addition Notifications: It’s good that notifications pop up when adding a task or client. This feedback is helpful for users. – Under Development
5. Task Disappearance: Tasks disappear and do not show in the schedule tab.  They should. It is working fine. No disappearance
6. Duplicate User Entries: When I made a file it ,  ended up in the system three times. -Done
7. Client Task Tab: Tasks added through the client’s tab aren’t showing up in the client portal.Is it the intention to schedule a task for the client? – Under Development

**CRX Hero Issues**

1. Payment Fee: Lets make the fee 19.99 and add a 6% tax to it. Again, automatic renewal should be set . -Done

**Email Date 08-Nov-2024:**

1. These arent clickable. When you click them nothing happens. -Need Content
2. The reads Credit Repair Xperts. Remember the name of this company is CRX Hero. I would like to change it to a 3 days $1 access fee then a monthly membership fee of $19.99 plus tax which I would like to be 6.625%. Remember I want this to automatically convert to a monthly membership. If the client wants to cancel they need to go to opt out at a seperate time. -Done
3. How does the basic plan .... Please remove. This is not applicable to CRX Hero. -Done
4. Step 3: **It still does not allow me to get pass step 3!** -Done. Please use testing details only
5. The Features button at the top of the screen is not functioning – Need content
6. At the top of the screen - Welcome to the credit repair xperts should be in ALL CAPS -Done
7. Swap these  2 picturees. Mark should be the male and Kelly should be the female. -Done
8. Subscription: 3 days than converts to a monthly membership -Done
9. This should only say $1. Not $1/month -Done
10. On all other plans Subcription should say: Monthly. I have previously made this request. -Done
11. This image and the wording still needs to be changed. It should be something related to credit repair. I have previously made this request. – Need Content
12. When you select clients I would like these two fields to be able to be edited. Since I will have to manually imput this data I need this done. -You can edit these from the edit button
13. Remove the invoice section -Done
14. The verbiage under Creditor Furnisher is incorrect. Needs to be changed. – Need Content
15. Affiliate - Add and View affiliates here -Done
16. Run Dispute Wizard is not functioning. -Under Development
17. On the internal note section I would like it to also display the time of entry,. In EST format. -Done
18. I don't see the simple audit. Remember, sending out one of these is part of The Credit Repair Xperts' intake process. -Done

**Requirements:**

I need UI from Stitch Credit API support to display results from all bureaus. Currently, results are shown in table and PDF formats.

The Stitch Credit API is currently in testing mode, accepting only test details. Please reach out to Stitch Credit API support to transition it to live mode.