**Meeting Notes from: 11/8/21**

Meeting w/dev to review document of updates

Decision made to regroup on Wednesday after review of the above requested updates.

Go through Updates

Complete bug list

Regroup on Wednesday to discuss when bug list can be completed

NOTE:

* All pages for the REALTOR PROCESS have been reviewed and the following list of bugs and requested updates are below.
* We have partially completed the CLEANER PROCESS pages. The details listed below are accurate.
* We have not completed the following sections:
* Account settings
* Admin portal

Summary:

1. Realtor enters property address of property
2. Address should be retained for CLEANERS to be able to view in their dashboard to select (These are orders that have been placed by the realtor.

REQUIRED FROM CTC: Docusign Api Key for integration with the HTML forms.

**REALTOR PROCESS:**

1. Click “Hire Cleaner”
2. User/Sign-up page
   1. Enter name, email, password
   2. Click “Sign-up”
   3. Display account Info page
      1. **BUG:** Dashboard is displaying before account info. Display account/info page BEFORE Dashboard

(Done)

Dev: Checked

Answer: In your previous document (the last one sent) you have mentioned that the user after signup will go into admin approval. At this point, would you allow them to perform any actions on the site other than seeing the info that they have already submitted while signing up?

Client Answer: Realtor can login but not cleaner   
Dev: We have added validation only for Realtor at this, we will add validation for Cleaner when we start work on Cleaner side.

* + 1. **BUG:** Update All fields to be required

Answer: Understood and also the “We need a little more information from you” page which asks for additional info, would that need to be required fields as well?

Client Answer: All fields are required  
Dev: Done

* 1. Order History page

1. Place-Order Page
   1. Section - List of all properties entered
      1. User will begin entering property address.
      2. The full address should be listed in drop down and be clickable
      3. **BUG:** Remove City/State/Zip fields (Done)

Answer: Understood, and I think you guys mentioned that the Zip code will remain along with Unit#, need clarity on this. Also, [Place Autocomplete Address Form  |  Maps JavaScript API (google.com)](https://developers.google.com/maps/documentation/javascript/examples/places-autocomplete-addressform#maps_places_autocomplete_addressform-html) (This needs to be shown to CTC client for testing the functionality out and also discuss the drawback) This feature is linked with the geolocation restrictions. Very important!!!!!

Client Answer: Cleaner will only city & state (Done)  
Dev: Updated

* 1. Section - Access
     1. Realtor will enter (free form) access information (Done)
     2. Information entered should save when “next button” is clicked (Done)

Answer: Understood, and since it is not showing up right now, we’ll fix this issue.

Dev: Fixed

* 1. Section - Summary screen
     1. Should list all information previously entered by realtor
        1. \***BUG** – Access info listed above next section does not match access info entered prior to clicking “Next” button.(Done)
* Answer: Understood, and since it is not showing up right now, we’ll fix this issue.

Dev: Fixed

* 1. Section - Property Details
     1. All fields “labels” should continue to display. For example, “Name” field, when you first click on the section is clearly defined. When this section is first displayed all fields are correctly labeled
        1. **BUG:** After saving, field information entered is not mapped correctly within the fields displayed (Done)

Answer: Done!  
Dev: Fixed

* + - 1. **BUG:** When you click edit, to modify section information, the labels within the section are no longer displayed. For example, the “Name” field is blank. (Done)  
         Dev: Fixed
  1. Section - Agent Information
     1. **BUG:** Mapped incorrectly after hitting “Next”

Answer: Done  
Dev: Fixed

* + 1. **BUG:** This should be a required field.

Answer: Done  
Dev: Updated

* 1. Section – Closing Information
     1. **BUG:** Date/Time of cleaning not saving when you click “next” – need to display date.(Done)  
        Dev: Fixed
     2. **BUG:** Date displayed incorrectly on “Summary”
        1. PleaseFormat as MMDDYY(Done)  
           Dev: Fixed
     3. **BUG:** Calendar drop down on MAC issue – does not display calendar.

Ans: This will be working on Windows for now as discussed but this will be working by Monday on Mac as well. Also, to remind you cross device optimization will be done as the last step after everything is confirmed from your end.  
Dev: Fixed

* 1. Section – Plans and Coverage
     1. As user selects one of the options, should change color

Client Answer: Working

Answer: It already is changing colors to a grey scale, if any other type of color is needed, please specify.(Done)  
Dev: Working fine

* + 1. **BUG:** Text within each box should be aligned vertical and horizontal middle/middle(Css)

Answer: You guys left some space above the package deliverables because you wanted to add something over here later. Is that still the case? If yes, we’ll leave the space above. For horizontal alignment, we’ll fix this.

Client Answer: No need space for text, align it accordingly

Answer: Done  
Dev: Updated

* + 1. **BUG:** when user clicks “Coverage details”
       1. The provided PDF should display

Answer: The provided PDF needs to be converted into HTML. The reason is that this info has to be mapped on to property task list later on. This cannot be directly uploaded as a PDF because of that. We’ll get this done for you, if you agree on this.

Client Answer: create html & dynamic list of pdf to show information to other pages

Ans: Done  
Dev: Updated

* 1. Section – Additional Add-Ons
     1. When user changes the quantity the corresponding dollar amount should update
     2. **BUG:** – Format QTY column and Numbers column to be aligned.

Ans: Done  
Dev: Fixed

* 1. Section - Disclaimer
     1. Free text
     2. **BUG:** Each new word in Header should be capitalized(Css)

Answer: Done, please check and confirm  
Dev: Fixed

* 1. Section - Summary
     1. All options selected should sum and total displayed
        1. Calculate Package selected
        2. Calculate Add-Ons
        3. **BUG:** total is incorrect – If user goes back to update after viewing summary, then the total adds correctly. This could be a lag?

Answer: This has been fixed.(Done)  
Dev: Fixed

* 1. On “Save”
     1. A pop-up box should display with submission status.
     2. **BUG:** Update text to display “Choose recipients that will receive an Invoice/Summary”(Done)  
        Dev: Updated
     3. A radio list of emails should display, with option to click who receives the invoice email.(Done)  
        Dev: Added
        1. These emails should be from the buyer/seller/co section.
        2. User chooses radio buttons, then clicks “Submit”
        3. An email should be sent to the emails selected, and the realtor submitting information.
        4. **BUG:** incorrect email addresses are being included

Answer: Done  
Dev: Email is sending to respective receipt, I have question here for client should we remove button of “SEND INVOICE” in “Open Orders” action drop down “Invoice summary”?

* + 1. **BUG:** The email format for Invoice is incorrect – The email currently does not list the name of the company, which is “Clean to Close”(Css)
    2. **BUG:** The attachment sent in the email is not great
       1. The attachment should be the same Invoice Summary from the “Print Invoice” page. (Css)

Answer: You guys got this done specifically different for email and we had to custom develop that (hardcoded on HTML). You’d want to change that back now to the print invoice layout? This would need to be done again on HTML and that will take time and additional cost guys.

Client Answer: Need layout to be like the print version of the existing summary (Css / data correct)

Answer: This is Done  
Dev: In Process

1. **BUG:** When you click “Cancel” nothing happens. Clicking cancel should take you back to the Place-Order page, Summary section.

Answer: This is done in a different way but done. When you hit “Cancel, this cannot take you back to the “Summary” page because that data has been saved in the database to generate an Order ID. Now, that being said, you would still might need to send an invoice afterwards regardless. For that, we have placed a send invoice in an email in the invoice section for every respective order, so the client can still send invoices via email even after they have canceled it.”  
Dev: Fixed

1. Realtor Dashboard:

* Order History Page:
* All properties ordered should be displayed here
* **BUG:** Closing Date Column is displaying wrong for *SOME* orders (Done)

Dev recommendation: All the dates are correctly displaying now. Guys our recommendation is to change the “order date” name to “Service date”, because this might be confusing for your end-user/Realtor as well as it was for me (Jacob). Because right now it is showing the “service date” in the order date section. Let me know what you guys think about this and we can get this changed or act accordingly.

Dev: Fixed as above

* All closing dates should pull from date entered and be formatted the same.
* **BUG:** Labels not aligned with actual column detail (Done)

Answer: Done.

Dev: Fixed

* **BUG**: Remove column “Order #” (Done)  
  Dev: Fixed
* **BUG**: Add a column: “Order Date” (Done)  
  Dev: Added

Answer: The “Order#” will be replaced with “Order Date”

Sort: Default sort by service date

Done

Dev: Fixed

* **BUG**: Update to Allow each column to be sorted (visual indication by arrow)

Answer: Will do. It will be sorted by the closest date.

Done

Dev: Fixed

* Action Modal Dialog
* Reschedule option:
* If Agent clicks on reschedule
* 1. If Cleaner is already assigned
* If ‘scheduled clean date’ is within 10 days,
* **BUG:** Then Reschedule modal should NOT available

Answer: Done

Dev: Fixed

* **BUG**: UPDATE \*\*NEW Functionality needed: pop-up message “Original scheduled cleaning is within 10 days and a cleaner has been assigned. Please contact support at support@cleantocloseco.com for assistance.”

Answer: Need clarity, if the reschedule button is removed altogether once the 10 day timeframe has come to pass, how or where do we show this pop-up?

Client Answer: If the 10 day window has come to pass, upon clicking reschedule, the pop up should say the above written in quotation marks

Done

Dev: Fixed

* If ‘scheduled clean date’ is more than 10 days
* **FUNCTION UPDATE**: We have not been able to test this due to other functionality not in place. The following is what should happen:
* Agent can reschedule using reschedule modal

Answer: working, we can test it out together(Done)

Dev: Fixed

* Email Notification goes to cleaner to check dashboard updates.
* Cleaner will have the option to accept new dates or release the job
* This is accomplished by a notification on cleaner dashboard.
* The “Accept” or “Release” process will work the same as detailed below.
* 2. Cleaner not assigned
* If no cleaner is assigned (regardless of dates), agent reschedules clean date as normal process.
* Cancel
* Drop down text
* **BUG:** grammar and capitalization needs to be updated.(Done)

Client: The first letter of the first word in the sentence will be capitalized and the remaining follows normally in lower case, for both reasons.( Done)

Dev: Fixed

* Cleaner is assigned:
* Email notification is sent to cleaner
* Cleaner dashboard is updated
* Line item for accepted order remains, with an updated status of “Canceled”

Done.

Dev: We have fixed realtor side issue, cleaner side will be resolve when we work on cleaner side

* **VERIFY**: Clean to Close pays the cleaner for each cleaning
* If a cleaning is canceled within 72 hours, cleaner should still get paid.

Answer: Need to discuss this. This was mentioned in a note but not explained explicitly as how you guys will be paying the cleaner. Would the payment not be refunded to the realtor if he performs this action? And the payouts work normally? Or the realtor will still be refunded and the payment will be made by CTC directly to the cleaner and adjusted manually from the back end. How will this work?

Client Answer: In between 72 if job is cancelled by realtor so email will be sent to admin and the admin will pay or adjust whatever amount they think through Stripe themselves manually. The client can also adjust that amount after paid through stripe on the cleaners payout section manually as well.

Dev: Fixed as above

* Is this reflected on the Admin page?

Answer required for above for clarity.

Client Answer: Job cancel will be shown in the admin panel.

Dev: We will when we work on Admin Panel

* Invoice Summary (ViewDetailClener page)
* When user clicks “Print Invoice”
* Need to update the invoice that pops up
* **BUG:** Add Payment information for title company to send payment to Clean to Close

Not Done. Need company info for CTC and will it be way down on the bottom and centered?

Dev: Fixed

* **BUG:** Add text to print who is responsible for paying invoice

Answer: Will get this fixed, also this is connected with the buyer, seller, agent info. Hence, clarity on the buyer, seller and agent info section is mandatory.

Client Answer and note to dev: Invoice should show who is responsible for payment section, this will come from who is responsible section in the buyer, seller and agent detail section.

Dev: Fixed, responsible person name will be shown on Invoice.

* This comes from the Place-Order page, Closing Information section, “who is responsible for payment”
* **BUG:** Text spelling – look at document in detail to correct all fields that are incorrect

Answer: will get it checked before delivery again for typos.

Dev: Fixed.

**CLEANER PROCESS:**

1. Click “apply as cleaner”
2. Video Page
   1. **BUG:** Update Video Title: “What You Need To Know”

Ans: Copy that. (Done)

* 1. **BUG:** Edit text Remove the “What you need to know” header that is currently under video.

Ans: Copy that. (Done)

* 1. **BUG:** Font and Font color look different than other pages

Ans: Will get this fixed.

* 1. **BUG:** last statement on bottom of page should be removed: “\*This is for $2795…”

Ans: Would you like us to remove the whole line or just the words mentioned above? Need confirmation. (Done)

Client Answer: Whole line

* 1. Click apply as cleaner

1. Lets-get-to-know page
   1. **BUG:** Remove Fields: Zip, City, State

Ans: need to discuss this as the google maps api will clash. Link sent above.

Client Answer: add unit no and remove state,city both side realtor and cleaner. Note to Dev: through google maps APi select city and state and show that in the unclaimed jobs address, the full address wont be shown until the job is claimed, is the logic!

* 1. **BUG:** Add Field: Unit Number . (Done)

Answer: Ok

* 1. How far are you willing to travel?
     1. This question should:
        1. **VERIFY**: Limit the jobs available on cleaner dashboard

**Client Answer**: Add additional charges by referring to the document sent by the client that explains cost for add ons for cleaners.

* 1. Individual or Team
     1. **BUG:** Modify Header Text from “INSURANCE” to “Insurance” (Done)

Answer: Copy that.

* + 1. **BUG:** Add description field to each section:
       1. Insurance – Sharayaxh to send text, please add description field
       2. Background Check – Sharayaxh to send text, please add description field.
       3. W-9 – Sharayaxh to send text, please add description field.

Answer: copy that, please add the text right with the respective section here.

Note to self (Jacob I think there is a bugggg!!): When you select individual, it shows required fields which seem to be correct. If you select team and add a team member, it just shows the background check for the team member and not for the person applying on the behalf of the team or could be part of the team. Confirm with client.

Client Answer: Account holder should be added as team member with auto info added.

* + 1. Individual, radio button selected:
       1. Are You Insured, Radio button
          1. No, selected

User is given option to click link to obtain ins.

If user clicks link, third party website is displayed in new window.

Once user completes this info, they will receive a new policy certificate of insurance.

**BUG:** Link is missing

1. Answer: we still need the link to this please. (Done)

Client: here is the link: [thimble.sjv.io/a1ABMZ](http://thimble.sjv.io/a1ABMZ)

(Done)

* + - * 1. Yes, selected

No errors found.

* + - 1. Upload Button
         1. User clicks Upload to upload certificate of insurance
         2. Uploaded documents should save under users account settings page, documents uploaded section.
         3. **BUG:** After document is uploaded, it would be nice if the name of the document uploaded is clickable in order for user to view that they uploaded the correct document. (CSS Work)

Answer: Will get this done for you.

* + - * 1. **BUG:** Upload button moves sometimes after uploading document to left side of screen. Tested on Chromebook, Chrome browser.(CSS Work)

Answer: Agreed, it is moving. The movement is due to the fact the the characters of the file name will influence the movement of the button. The functionality requires the name to appear either on the left of the button or the right. If it is on the left of the button (which it is right now), it will push the button to the right because the container is ending right below. If it is on the right of the button, the button needs to be moved to the left to allow longer file names to not mess up the CSS.

Solution\*: the button needs to be moved to the bottom left of the container to ensure the button doesn’t move with the file name length. This will obviously change the uniformity of the buttons but it still makes sense since this is a unique section and the integrity of the CSS is important as well. As you pointed out the glitch, you users will as well and that is not a good user experience. My two cents.

Client Answer: button will be on the far left bottom for every upload option and the file name will pop up from the right of the button and it will be viewable/downloadable. Do this for every upload button to make it streamlined.

* + - 1. Background check
         1. Click here link
         2. A new pop-up is displayed that will allow user to e-sign background check disclosure

Background disclosure text: received via “Criminal Watchdog”

Answer: Where would this text be placed or replaced with?

Client Answer: No Bug

**BUG:** The documents are very long. How will users know all the fields to complete? Is there a way to auto-tab user through document?

Ans: Would not be possible within the scope of the project. However, we can add text to guide the clients to see more info on the other pages.  
Client Answer: Add note in the document guiding the client to scroll down to see more.

**BUG:** ALL fields are Required! User should not be able to hit save until everything is entered. Would be nice if a summary of missed fields should list.

Ans: Understood.

* + - 1. **W**-9
         1. User will click W-9 Link, fill it out, save
         2. Upload W-9 document
         3. Uploaded W-9 should save to users account settings, documents uploaded section.
      2. Click “Save and Continue”
      3. Section – “Pick Your Subscription”
         1. **BUG:** Align Text to be centered horizontal and vertical.

Ans: The text seems to appear fine. However, you might be viewing this on a different device to which this system is not optimized for. Optimization is the final step after all issues, functionality flow, verbiage and anything related to the system is completed and approved by the client. You guys can view the alignment via screenshare to ensure it is working on a system as of now.

* + - * 1. “Terms and conditions” link is highlighted.

When selected, it should display a page of “terms and conditions.”

**BUG:** When you click the link, you are returned to beginning of sign-up process. Link should display terms and conditions

Answer: Agreed. Bug will be fixed and we would recommend the terms and conditions page to appear as a pop-up here. What do you think?

Client Answer: Add “Terms and Condition” page in footer and rename the terms and services page everywhere as “Terms & Conditions”

* + - * 1. Click save and continue
      1. “Account Package Name” page (Credit card info)
         1. This page should display the total due:

Package details

Background check

Total

**BUG:** There should be a “Pay Now” button

Button should link to Stripe

Ans: Nope, this won’t be possible, and I’ll explain why. When paying through a 3rd party link (it is called checkout.stripe.com) the payments won’t be validated automatically and it will ruin the automated process. Right now, we are generating a token when a payment is made through our URL which indicates that a payment is made and in run-time all actions are automated. If we chose to do the checkout.stripe.com feature, payment validation process will change to manual and a lot of things would have to change which in return stretches the timeline and resources exponentially. You guys also mentioned previously that the card can be updated by the client by going to my account section, you won’t be able to do that! For updating subscription/plan, there is an auto-charge feature which is only possible by saving the card info. If the cleaning jobs are finished and you need to top up, the auto-charge feature won’t work as well if we used stripe checkout directly. I’ll tell you this, the cards won’t be even shown to you, those are encrypted.

Client Feedback: Will be discussed with Anna, Stripe as well. Jacob will refer to developer forums to see if anyone addressed a situation like this before.

Clean to close is not collecting any credit card info.

\*Will Send Stripe info in email.

It is required, will wait for this – Jacob.

* + - * 1. **BUG:** Use Stripe to collect fees
        2. **BUG:** Remove credit card info fields
        3. **BUG:** Updates to Note Section 1. Verbiage sent previously
        4. **BUG:** After payment is complete, user should see a Status message: ADD Text: “Thank you! Your application is under review. You will receive an email within 48-72 hours.

Answer: Right now there is a note right below the payment section. Would you want to remove that too? And have a page added once a payment is processed?

Client Answer: This whole section is subject to discussion and resolution about the stripe and payment dilemma!

* + - * 1. **BUG:** Add “Previous” button to this page

Answer: Noted.

* + - * 1. **BUG:** All Cleaner applications should be available to view on the Admin dashboard

Answer: It already is in the admin section in the user management section.

* 1. Team (radio button selected)
     1. **BUG:** Update to add a note: “Main account holder, please include yourself as a team member”

**Answer:** We are going to add a section for the main account holder in the start I think which makes sense to make sure that the one holding the account also gets their background check done upon completion of the whole process. Why would you want to add the main account holder in the team section afterwards? Just would like to understand this. Just want to understand this logic before we make any changes during our next meeting.

Client Answer: Add owner in a separate section not in team member.

* + 1. User adds member information
    2. No limit to how many can be added
    3. Name, phone number, email should be added
    4. **BUG:** Add a field for email

Answer: Will do and also we are taking only the name and phone number in initial signup/team member section, would you want to collect the email address there as well?

Client Answer: I agree.

* + 1. Click save and continue

1. AccountMyTask page
   1. **BUG:** Edit Header, Add “!” after name (Done)
   2. **BUG:** Edit Footer, Remove Note on bottom of page (Done)
   3. **BUG:** Remove column “Order #” (Done)
   4. **BUG:** Remove column “Release” (DOne)

Answer: point 5.A,B,C understood. Point 5.D says remove release column. Would you want to release the main column heading or the whole column?

Client Answer: Just column heading

* 1. Click “Claim new job”
     1. New page opens – AccountBrowseTask Page
        1. Available Jobs List is displayed
           1. **BUG:** Edit text “Arrival Time” to “Service Time” (Done)

Answer: Understood.

* + - * 1. **BUG:** Amount Paid column is incorrect

This column is calculated using the equation below:

50% of package realtor chose for this job.

Answer: We did 10% when we developed this. From the back-end/admin section this can be tweaked as well. We will change it to 50%. (done)

* + - * 1. **BUG:** Property Details

should ONLY show City name. Remove exact street address. (The cleaner has not yet accepted the job, therefore exact street address is unavailable.)

Property details (bedroom, bath information) should transfer correctly.

Ans: Understood.

* + - * 1. If cleaner selects “Accept”

**BUG:** Make pop up larger

**BUG:** Add Text “"By accepting this job you agree and understand that in the event you need to cancel less than 72 hours prior to the cleaning appointment, you will be charged an emergency fee of $55. If you do not show for an accepted cleaning appointment, there will be a $125 fee charged to the card/account on file." Then add a clickable "Terms and Conditions" hyperlink. The hyperlink should populate in a NEW window and show the section referring to this.” (Done)

Ans: We will make it large enough for the text to fit.

If user Clicks accept, user will be taken back to cleaners dashboard (its working)

If user Clicks cancel, user will be taken back to previous page (its working)

* + - * 1. If cleaner selects “Decline”

The property will be added to the declined folder. Cleaner may accept at a later time (Its working)

* 1. Address Column:
     1. All addresses should be clickable
        1. When an address is clicked, Account\View\_Detail Page should open
        2. The left hand side should display buttons that allow clean to choose status.
        3. **BUG:** Some properties do not display property detail
        4. **BUG:** Some properties do not display buttons on left side (I’ve arrived, I’ve Left, Upload/Submission)

1. Ans: We will remove the 24 hour condition from the left side panel, also display the code blurred/unclickable until 24 hours remaining also the address visible in the main dashboard (accepted orders section) will be highlighted hovered upon. Also the property details will be fetched properly.
   * 1. Account\View\_Detail Page:
        1. **BUG:** Property Type is misspelled when it is a “Single Family” Update “Signgle” to “Single” (Done)

Ans: Will correct it.

* + - 1. **BUG:** Package Detail is not populating next to “Package Name”
         1. This should list out all tasks of the package selected.

Ans: If we have an answer on the pdf issue as mentioned in above comments, this would be possible.

Client Answer: Package details should be populate (also mentioned above about pdf to html package details)

* + - 1. **BUG:** Edit Text: “Package Name:” should be changed to “Package Details:” (Done)

Ans: You said above, right above this, that package name should populate next to the package name? Is it this or the other guys?

Client Answer: Add package details instead of rename it, the package remains as well.

* + - 1. **BUG:** Edit Text: Note on bottom should say: “Access details will be shown 24 hours prior to the scheduled service.”

Ans: Will get this added.

* + - 1. Account/Upload\_Arrival\_Departure (Upload/Submit) page
         1. **BUG:** Page should match the format of the entire website (Theme, font, checkboxes, separated by sections, etc) See “How we Vet” page.

Answer: Understood, will get this section designed and then shared with you for approval prior to development.

Client Answer: Redesign as sections wise and get approval from client before development!!!!

* + - * 1. **BUG:** the Arrival, departure times on this page should match the most recent arrival and departure button clicks. For example, if a cleaner clicks the button twice, only the last submitted date/time should populate.

Answer: I tested this and it is working.

* + - * 1. **BUG:** Property task list should auto populate with the package that was chosen and paid for. This will detail the tasks that the cleaner has to perform.

List should display in checklist format.

Answer: Understood and will get it done if the above PDF and HTML issue is addressed.(I give to Ammar for html today)

* + - * 1. **BUG:** Only allow the “Property Pictures” box to be checked after three before/after pictures have actually been uploaded.

Answer: Understood.

* + - * 1. **BUG:** Only allow the “Signed Completion Page” to be checked AFTER the photo of completion checklist photo has been uploaded.

Or, Auto Check this box after user uploads picture.

Answer: Understood.

* + - * 1. Click Submit

The completed submission/UploadArrivalDeparture form should be available to view on the Admin page.

**BUG:** The completed submission/UploadArrivalDeparture form should be available to view on the Submitted tab on the Cleaners Dashboard. This is not currently happening.

Answer: We will get this fixed, right now, if you reload your submission page, you will find that there. But this will be fixed.

* 1. Click “Release Job”
     1. If the job clean date is greater than 10 days
        1. If user clicks release job, **VERIFY**: this job is released back into the “Claim New Job portal” for all cleaners to be able to select.

Answer: This is working. Checked and verified. (its working)

* + 1. If the job clean date is within 10 days,
       1. cleaner clicks “release job” the cleaner will get a pop-up notification that will tell them the job cannot be released and to contact support.

Answer: this is working

1. Select a job
   1. VERIFY: Each cleaner should only be allowed to select jobs that total the max quantity paid for in their subscription package. The ability to select jobs is limited based on package cleaner selected and is paying for.
   2. This resets at the beginning of each new month.
   3. Paid packages should pro-rate based on the date cleaner signed up.

Answer: This will be done and tested with the client. For the pro-rated package renewals, we have mentioned card detail saving issue and its consequences above.

**BUG:** Resource Page Needed

Question: An additional page?

Client Answer: This is replaced by FAQ’s page. This page will also be searchable in terms of questions the logic will be that it will be matched by the questions closest to it.

Re Client answer to client: We would recommend to have a whole list of questions in a page that is infront of people to see to save time in terms of development, the search function will take a long time to develop just for a simple question search. Please provide approval below, Sharayah or Debbie;

Dev: FAQ’s page is already develop need conformation from client

Information sent by Sharayaxh previously:

Realtor Sign Up:

1. After clicking on the join us button on the main page, agent needs to automatically be directed to the "We need a little more information from you!" page that we found in the "account settings" in the drop down menu. After that initial information is collected the account settings title should just be the "Welcome, xxxxxx!" (please add an exclamation point at the end of the welcome).

2. Can address auto populate when being entered in like other address areas within the site?

Realtor Dashboard:

1. On main dashboard page, next to the property information, the "Action" drop down - Invoice/Summary both need capitalization

2. Within the property information the date/time need to be revised/standardized to mm/dd/yyyy format. (All spots for dates to be entered should have drop down calendars when they are being selected so the date and time is uniform and in the right time zone. For example, under CLOSING DATE: 11/01/2021 | under SERVICE DATE: 10/31/2021 6:00 PM | NOT October, 31, 2021

3. When entering a new order- there needs to be a drop down calendar for closing and NO TIME DROP DOWN- realtors will not know this up front. REMOVE time information from closing all together. **Debbies computer shows a drop down calendar and time drop down and my computer does NOT show that (chromebook+windows vs macbook). This may be because Debbie created a new account and I am signed in under the example you gave me- need clarification.**

4. When entering "requested date and time of cleaning" those need the separate boxes - date in one box and time in another box. Dates shown on all dashboards need to be mm/dd/yyyy format NOT "October 21, 2021" format.

5. When date and time is being entered on almost all platforms- scheduling and rescheduling- date and time is not populating correctly- these areas are NOT communicating.

6. AFTER property services have been ordered and Realtor is on their dashboard- when they click on the property to view it's entered details- add a note that says "If any changes need to be made to the package or additional add ons, please email [support@cleantocloseco.com](mailto:support@cleantocloseco.com)."

 PROPERTY DETAILS INFORMATION

1. Access Details: It should NOT say igloohome as the background in the first box- it needs to say Property Access Information and then have the dropdown with igloohome under one of the bolded catagories- it's currently on there twice. START WITH LOCKBOX and remove PREMIER LOCKBOX options (we dont see those typically being used and they can enter it in "other").

2. Lots of mispelled lockbox names in the dropdown. "Sentrilock" | "Gate Guard, Doorman or Concierge" |

3. Boxes in the access details should read as following:

**Property Access Information**

**Code Information**

**One Day Code or CBS Code**

**Location of Lockbox**

**Additional Information for Access**

CLOSING INFORMATION

1. Please see information above -Projected Closing Date - remove time information

2. Closing/Title Company- spelling error- currently says "tittle" and should be capatilized

PACKAGE DETAILS ON ORDER FORM FOR REALTOR

1. Remove circles that have appeared on the 3 box options. They don't seem to have a purpose.

2. Boxes to say "Coverage Details" instead of "See All Coverage".

3. When "Coverage Details" is clicked, list of services should reflect format on website: SEE ATTACHED

4. Packages don't work to total the amount owed at the bottom of the page

5. After Order submittance, it's prompted to "click here"  it needs to auto-populate all the emails that were attached to the order and have a clickable circle in front of the emails for the option to send the invoice.

6. We tested out the invoice and it says "AHS American Home Shield" instead of Clean to Close

7. It says that the documents are attached and gives the option to upload more but there are no documents attached.

INVOICE/SUMMARY on REALTOR DASHBOARD

1. Formulation of summaries for each section - can the font be made slightly larger?

2. Closing Information section- date needs to be in mm/dd/yyyy format and add service date

CLEANER SIGN UP

1. Address auto populates but DOES NOT go into the correct fields. Auto populated address needs to separate itself into the city, state and zip code fields.

WORKING WITH A TEAM

1. In the background check section, we have discussed that the main member signing up still needs their own background check section. Currently, if signing up with a team, it shows each team member's name/section but not the main account holders name/section.

INSURANCE

1. The "Click Here" button for the insurance hyperlink DOES NOT work

2. Under "NOTE" section the sentence that starts with "own" needs to be moved up to be next to "your"

BACKGROUND CHECK

1. Remove bullet point and make the font and boldness uniform with rest of page

2. Should read: "We require all applicants to complete a background check. There is a one time fee of $18.95 per applicant."

3. On the Click here button for the background check- what is the difference on signatures vs them just typing their name? Also, there should be a prompt like DocuSign to go from one signature/initial to the next. I thought that's what we were going to be paying the additional $300 for?

4. After completion of the document, where does it go?

CREDIT CARD INFORMATION

1. At the top of that section "Let Us Get To Know You Better" should NOT be on the credit card page

2. In the credit card information box please remove "Payment 1"

3. First box should be "Name on Card", 2nd box should be "Address Associated with Card", then "Card number" then "CVC" and finally Expiration information should be in one box with mm/yy format.

4. Change PAY NOW ($0) button to "Submit" \***There needs to be a summary of what is being paid for and then the total being charged\***

5. In NOTE section 1: "A hold will be put on the card for the amount owed today. You will receive an approval or denial email within 48-72 hours. If denied, the held amount will be released less the balance of the background check."

6. In NOTE section 2: decapitalize "Monthly Subscriptions"

CLEANER DASHBOARD

1. Remove note about the access details- that should be written in the access detail information on each individual property until access details are released.

2. Note at the bottom needs to be similar to notes on other pages which is the word "Note" is in red and writing in normal coloring. Also, it should say "Note and then the writing starts after it just like the other note sections". This section should read, "By accepting this job you agree and understand that in the event you need to cancel less than 72 hours prior to the cleaning appointment, you will be charged an emergency fee of $55. If you do not show for an accepted cleaning appointment, there will be a $125 fee charged to the card/account on file." Then add a clickable "Terms and Conditions" hyperlink. The hyperlink should populate in a NEW window and show the section referring to this.

3. When cleaners are claiming a new job and click accept- inside of the pop up that asks if they are sure they want to accept put the disclaimer "By accepting this job you agree and understand that in the event you need to cancel less than 72 hours prior to the cleaning appointment, you will be charged an emergency fee of $55. If you do not show for an accepted cleaning appointment, there will be a $125 fee charged to the card/account on file." Then add a clickable "Terms and Conditions" hyperlink. The hyperlink should populate in a NEW window and show the section referring to this.

4.**I entered in an order as a realtor and it showed up in the cleaners side in "submitted" not in new orders and is not clickable. Nothing seems to be communicating.**

5. The headers of the section should read: Address | Order # | Service Date | Service Time | *REMOVE "relase" nothing is needed here.*

6. Address in cleaner dashboard should be FULLY shown/available since the job has been claimed at this point.

7. Where is the "Amount Paid" number coming from? That should technically just be 50% of whatever the package price is - which also isnt communicating with the invoices and other programs.

CLAIM NEW JOBS

1. Need a "My Dashboard" button in Claim New jobs tab in header tab (same spot as where "Claim New Jobs" is in the dashboard.

2. Once they've hit their limit of cleanings, where is there a pop up saying, claim this cleaning for an additional $10?

SUBMISSION/UPLOAD TAB

1. Inside the property details if the cleaner has clicked on "I've Arrived" & "I've Left" then those boxes should already be checked if that has been completed by the cleaner with their time/date stamps in the Submission/Upload tab

2. Number 3- the Property Task List should be auto populating the tasks of the package selected.

3. SPELLING ISSUES: I Arrive**d** at \_\_\_\_\_\_\_\_\_\_\_ | I Left at \_\_\_\_\_\_\_\_\_\_\_\_ | Property **T**ask **L**ist

4. Under Property Pictures: the box should be checked AFTER they have uploaded all required photos

5. Under Signed Completion Page: the box should be checked AFTER they have uploaded the document

6. ALL FONT/BOXES should be uniform

7. We had previously sent you and discussed putting our brand's boxes/look on this page and not having everything be so blah.

8. After it has been "Submitted" where does it go?

ADMIN BACK OFFICE

We really have no idea how it correlates to what we need to accomplish each day

1. Approve/vet new realtors who join

2. Approve/vet new cleaners who join

3. Get background check information and submit it to 3rd party

4. Approve Cleaners property submissions

5. Change and Update wording, testimonials, etc (we think we found this area)

6. "Square fit" is this supposed to be "Square Footage"? Like is that to change sq ft on packages?

7. Can we rename areas? Like Cleaning Service looks like a breakdown of all orders and its information- should be named something different?

8. Subscribe- is this a list of all the cleaners who are paying a subscription?

Additional discussion points:

* Code base

Php Framework: Code Igniter

* Display
* Theme

Custom designed

* Font

Gilroy family

* Browser differences

?? are you asking about different features not working? If yes, these are script issues, some will be fixed and some will need to be custom coded as stated in some points above.

* PC/MAC

? are we talking about device compatibility/optimization? If yes, that would be the final step after complete development/completion of the requests in this document.

* Images

? Don’t understand this

* Code Review

Source code will be given to the client for review and ownership

* Test Scripts

Need clarity on this.