

CT Accelerator



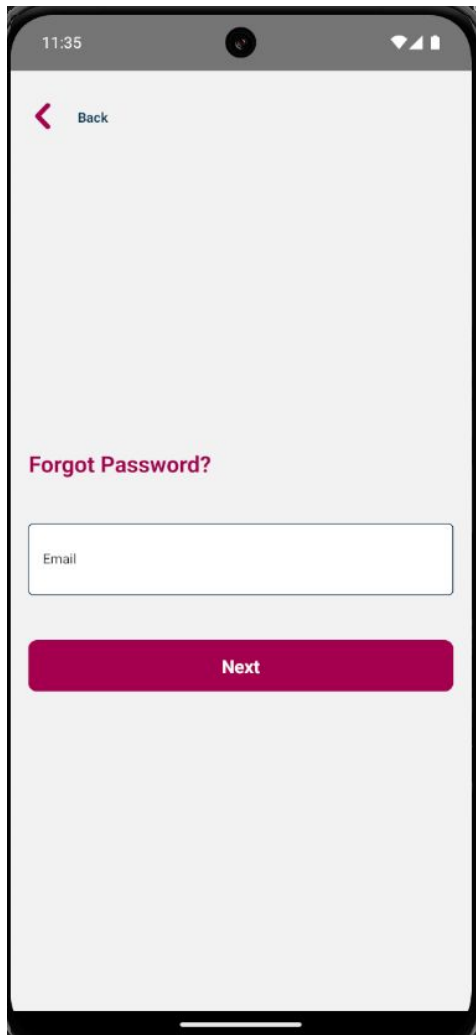
Login Screen

- This is the login screen, where users can sign in as an Admin, Staff, or Agent depending on their credentials.

- **Username:** userctaccel@gmail.com
Password: Test@123

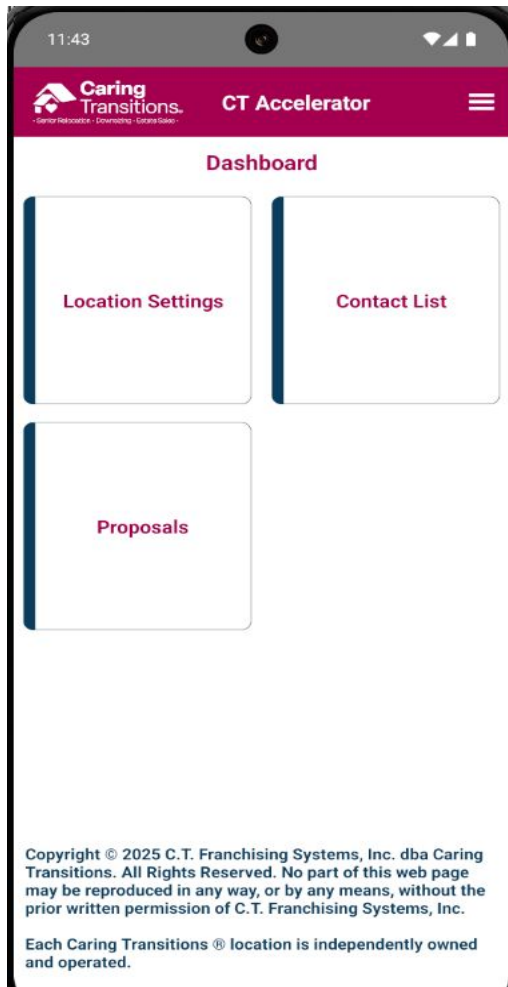
Note: Password must contain at least 8 characters.

- Must include at least:
 - **1 Lowercase** letter (a–z)
 - **1 Uppercase** letter (A–Z)
 - **1 Number** (0–9)
 - **1 Special character** (e.g., !, @, #, \$, %, ^, &, *)
- A **Forgot/Reset Password** option is available for users who need to recover their login credentials.



Forgot Password

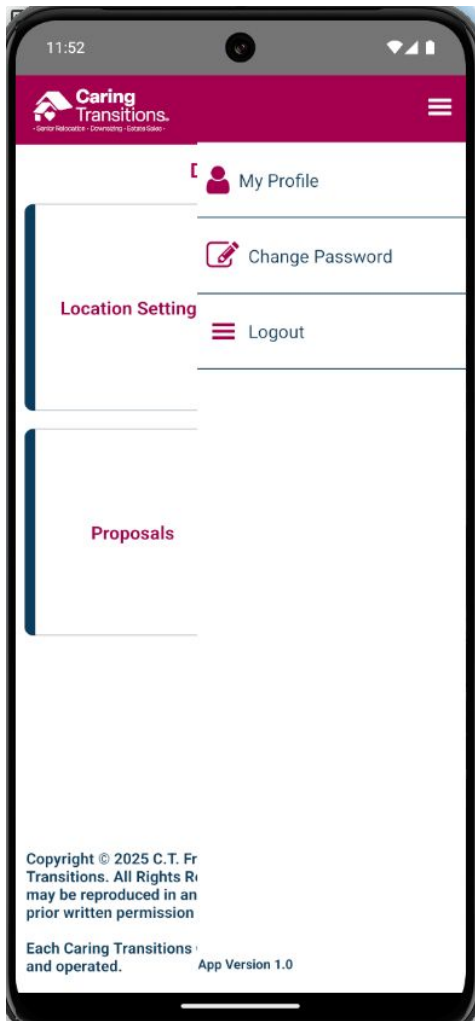
- Users can enter a valid email address to receive a **password reset link** on their registered email.



Dashboard Screen

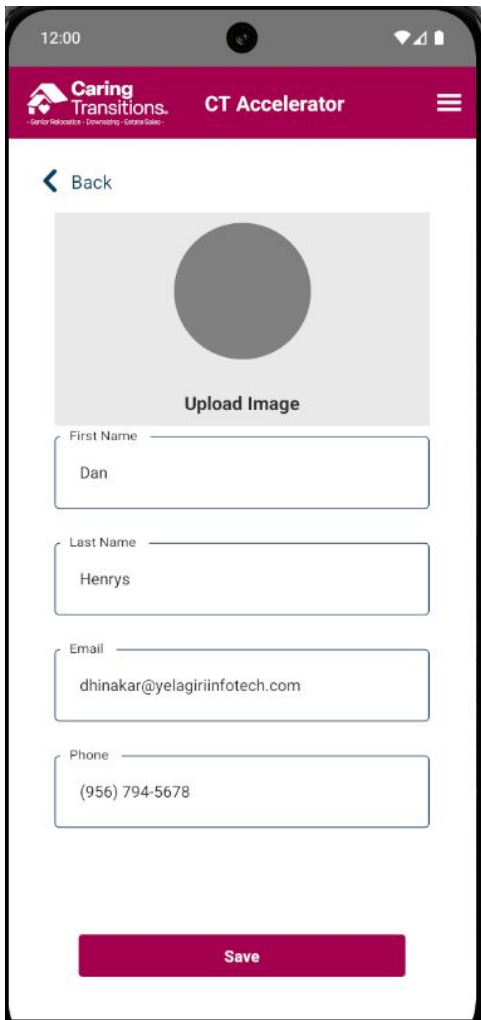
The dashboard provides **three main options** to explore the app:

- **Location Settings** → Displays location-level configuration options on the screen.
- **Contact List** → Shows a list of clients along with their details.
- **Proposals** → Displays all proposals along with their current status.



Hamburger Menu

- **My Profile** – Allows the user to view and edit their profile information.
- **Change Password** – Opens a screen to update the user's password.
- **Logout** – Logs the user out of the application.



Profile Screen

- Users have the option to **upload or update their profile image**.
- The screen allows editing of the following details: **First Name, Last Name and Phone Number**.

12:21

Caring Transitions
- Cancer Research - Connecting - Changing Lives -

CT Accelerator

← Back

Change Password

New Password

Retype Password

Password Strength: Weak

Between 8 to 15 Characters

At least 1 Lowercase (a-z)

At least 1 Uppercase (A-Z)

At least 1 Number (0-9)

At least 1 Symbol (!, @, #, \$, %, ^, &, *)

Save

Change Password

Users can change their password, provided the following conditions are met:

- Password must be between **8 to 15 characters**
- Must include at least:
 - **1 Lowercase** letter (a–z)
 - **1 Uppercase** letter (A–Z)
 - **1 Number** (0–9)
 - **1 Special character** (e.g., !, @, #, \$, %, ^, &, *)



Settings

Owner Info

Services

Location Template

Staff & Agents

Labor List

Hourly Rate



Settings

Labor List

Hourly Rate

Density Settings

Packing /Moving/Shipping Materials

Boxes

Liquidation Supplies

Location Settings

This section allows users to enter and manage location-specific data. The available options include:

- Owner Info
- Services
- Location Template
- Staff & Agents
- Labor List
- Hourly Rate
- Density Settings
- Packing / Moving / Shipping Materials
- Boxes
- Liquidation Supplies
- Additional Information

Note: The following explains **Briefly**.

12:39

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Owner Info

Office Name *
yelagiri info cbe test

Email *
dhinakar@yelagiriinfotech.com

Phone *
(947) 856-3222

Address *
Croc

Commission Rate% *
20

Apt, Bldg, Suite

Zipcode *
90008

Back Save

Owner Info

* User Can Enter the Location Owner Detail here

Services

Select the services to be provided, Click edit or view to modify the service contents offered to customer

S&O

Click to select the services

CleanOut

Click to view

Liquidation

Online Sale

Estate Sale

Relocation

Packing

Space Planning

UnPacking

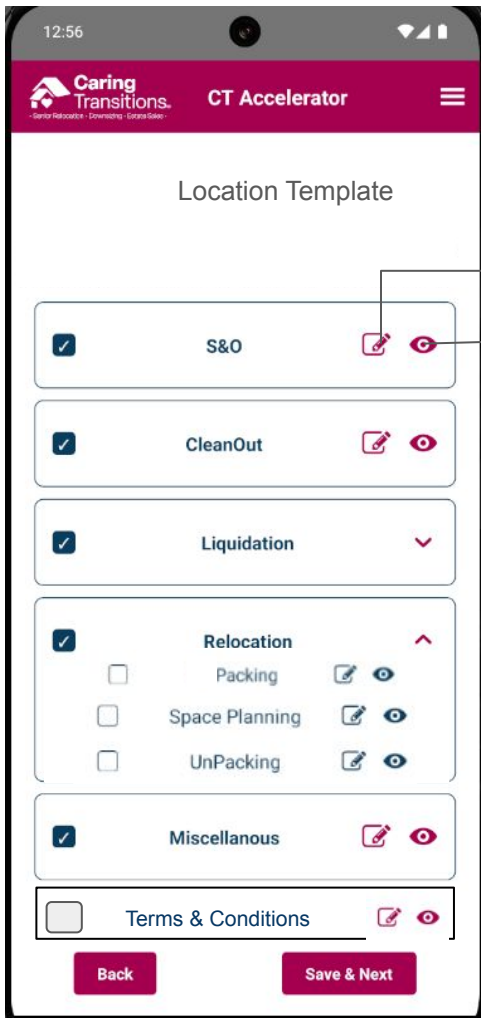
Miscellaneous

Services

* Services are configured at the location level and are available for selection when creating a proposal.

* **Note:** Only Admin or Staff users can edit and save the Services and Templates. Agents have **view-only** access.

- **S&O** refers to *Sorting & Organizing*, which includes work and calculations based on house data.
- **CleanOut** includes tasks and calculations based on house data.
- **Liquidation** also involves tasks and calculations related to house data.
 1. Online Sale
 2. Estate Sale
- **Relocation** requires specific, separate house data.
 1. Packing
 2. Space Planning
 3. Unpacking
- **Miscellaneous** includes additional services that the user may choose to offer.
- **User can Select Atleast 1 services to Save**



Click to Edit Location Template

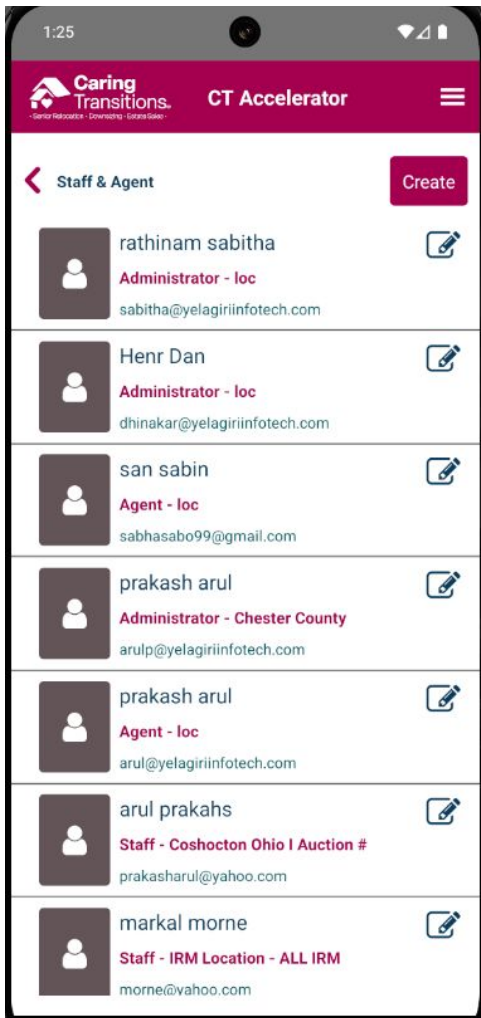
Click to View Location Template

Location Template

* Services are configured at the location level and are available for selection when creating a proposal.

* **Note:** Only Admin or Staff users can edit and save the Services and Templates. Agents have **view-only** access.

- **S&O** refers to *Sorting & Organizing*, which includes work and calculations based on house data.
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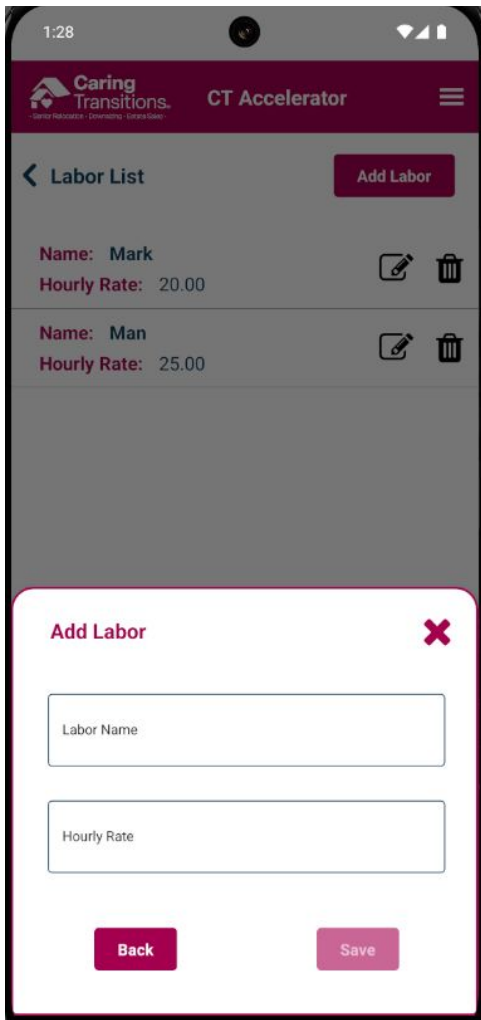
Staff & Agent

- This screen displays all Admins, Staff, and Agents.
- Only Admins have permission to **create** or **edit** Admin, Staff, and Agent profiles.
- Staff members have **view-only** access. The **Create** and **Edit** buttons are disabled or hidden for them.
- The **Staff & Agent** screen is **not accessible** to Agents.

The screenshot shows a mobile application interface for creating a staff or agent profile. At the top, the status bar shows the time 1:28 and signal/battery icons. The app header is purple with the 'Caring Transitions' logo and 'CT Accelerator' text. A back arrow and the title 'Create Staff & Agent' are at the top left. The form consists of several input fields, each with an asterisk indicating it is required: 'Location *' (a dropdown menu), 'First Name *', 'Last Name *', 'Email *', 'Retype Email *', 'Mobile *', and 'Role *' (a dropdown menu). At the bottom, there are two purple buttons: 'Back' and 'Save'.

Create Staff & Agent

- This screen is only accessible to **Admin users**.
- Admins can **create** or **edit** profiles for **Admins, Staff, and Agents**.
- Required fields include: **Location, First Name, Last Name, Email, Mobile, and Role**.
- Creating a Staff & Agent Location Render Based on the Admin user



Labor List

- This screen allows **Admins** and **Staff** to **add**, **edit**, and **delete** labor entries.
- Each labor entry includes the **Labor Name** and corresponding **Hourly Rate**.
- **Agents** do not have access to modify this list.
- Both Fields are Mandatory

Add Labor :

- Staff can add the labor into the location and their hourly Pay Rate

Hourly Rates

Mark-Up Cost % *

Burden % *

Loaded Hourly Rate *

Prefferd Hourly Rate *

Price Per Hour Per Person (PHPP) *

Back

Save

Hourly Rate

- Mark-Up Cost % and Burden % are user inputs.
- Loaded Hourly Rate and Preferred Hourly Rate values are calculated based on the Burden % and No of labor Added. User cannot edit it.
- Price Per Hour Per Person (PHPP) is a user input value and depends on the Preferred Hourly Rate.
- Only Admins or Staff can add or edit the Price per Hour per person (PHPP).

Average Hourly Rate

- **Pay Rate** = Total labor pay rate ÷ Number of laborers
- **Burden %** = User input percentage
- **Loaded Hourly Rate** = Pay Rate × Burden % + Pay Rate
- **Preferred Hourly Rate** = Loaded Hourly Rate × 400%

Example:

- Labor 1 = 25
- Labor 2 = 20

Calculations:

- Pay Rate = $(25 + 20) \div 2 = 22.50$
- Burden % = 30.00%
- Loaded Hourly Rate = $22.50 \times 30\% + 22.50 = 29.25$
- Preferred Hourly Rate = $29.25 \times 400\% = 117.00$

Hourly Rate Price:

This is the hourly rate you will charge per man-hour. It should be close to or based on the Preferred Hourly Rate.

Mark-Up Cost %:

This value is used in the Relocation Screen (further details to be defined).

1:30

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Density Settings

Density Type *
Low

House Factor *
23

Liquidation Factor *
24

Cleanout Factor *
2

Relocation Factor *
11

Back Save

Density Settings

- In Density Settings, the fields get values based on factors by User Entry. There are four density types.
- Use the dropdown to select the density type, which adjusts the factor values accordingly.
- Only Admins or Staff can add or edit the Factor.

Density Types:

- Low
- Medium
- High
- High High

1:36

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< Packing /Moving/ Shipping Materials Add

Paper
Cost Per Unit
\$ 20.00

Tape
Cost Per Unit
\$ 24.00

Peanuts
Cost Per Unit
\$ 66.00

Bubble Wrap
Cost Per Unit
\$ 20.00

Foam Sheets

Back Save

Packing/ Moving/ Shipping Materials

- Users can enter the cost per unit for each material.
- Users can add custom fields to include additional materials and their costs per unit.
- Only Admins or Staff can add or edit the material cost per unit

1:38

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< Boxes Add

Extra Small

Cost Per Unit

\$ 3.00

Small

Cost Per Unit

\$ 2.00

Heavy Duty Small

Cost Per Unit

\$ 56.00

Medium

Cost Per Unit

\$ 10.00

Heavy Duty Medium

Back Save

Boxes

- Users can enter the cost per unit for each material.
- Users can add custom fields to include additional materials and their costs per unit.
- Only Admins or Staff can add or edit the material cost per unit

1:39

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← Liquidation Supplies Add

Lot Containers

Cost Per Unit

\$ 10.00

Post-It-Notes

Cost Per Unit

\$ 23.00

Price Tags

Cost Per Unit

\$ 13.00

Plastic Bags

Cost Per Unit

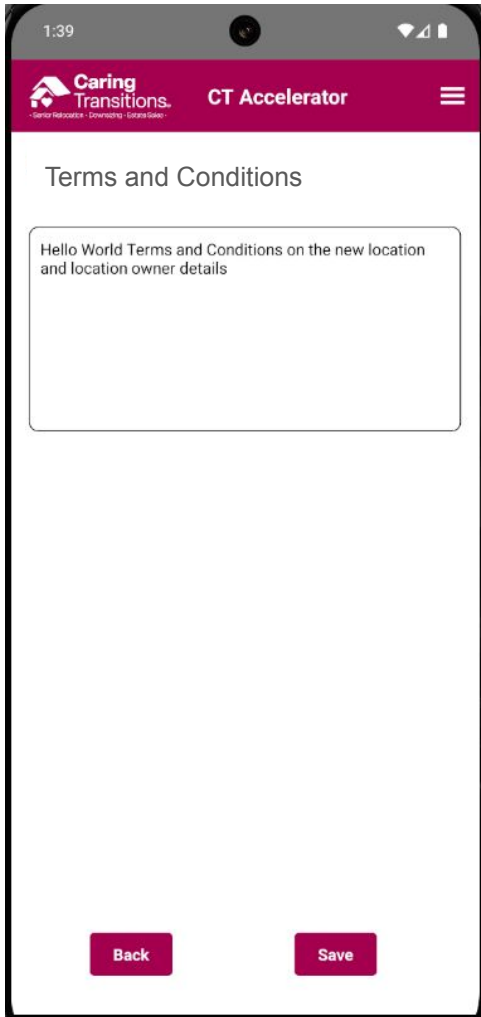
\$ 12.00

Masking Tape

Back Save

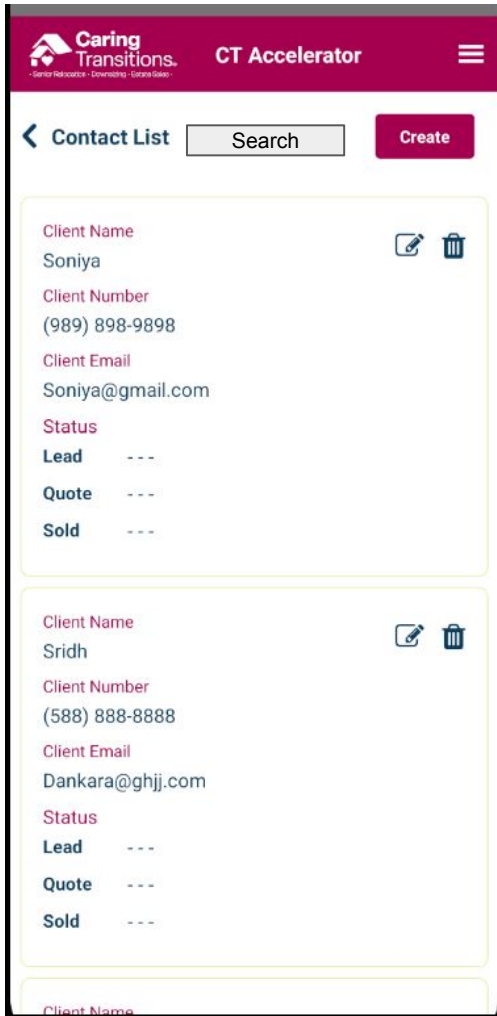
Liquidation Supplies

- Users can enter the cost per unit for each material.
- Users can add custom fields to include additional materials and their costs per unit.
- Only Admins or Staff can add or edit the material cost per unit



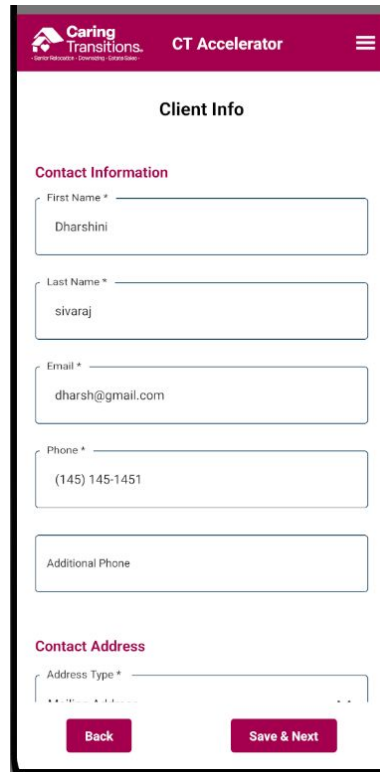
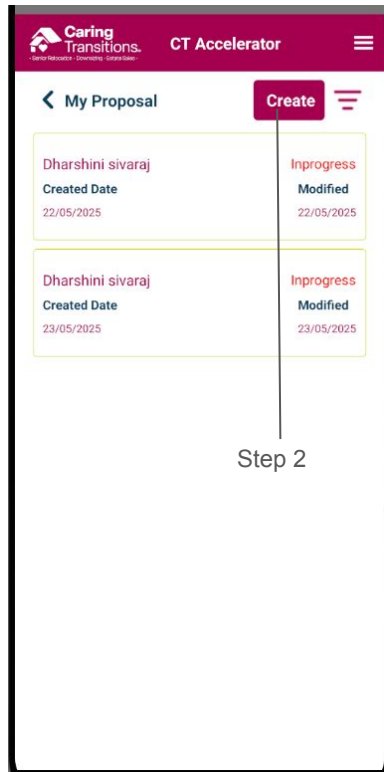
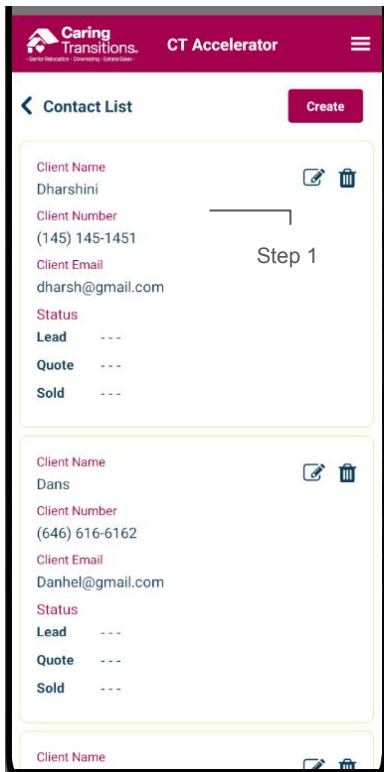
Terms and conditions

- Only Admin or Staff can add or edit the Additional Information.
- This information will be displayed on the Estimation PDF.



Contact List

- This screen displays a list of clients, each with their associated proposals..
- Click **Create** to add a new client.
- **Status** indicates the number of proposals in each stage:
- **Lead** → Number of proposals in *In Progress* status
- **Quote** → Number of proposals in *Completed* status
- **Sold** → Number of proposals in *Settlement* status
- Only Admins and Staff can edit or delete client information.
- Clicking a client card navigates to the **Proposal List**, displaying proposals related to that specific client.



Step 1:

- Clicking a client card navigates to the **Proposal List**, displaying proposals related to that specific client.

Step 2:

- Clicking **Create** navigates to the Client screen to create a proposal using the **existing client information**.

 **Contact List**

Edit Contact

Client Name

Soniya

Client Number

(989) 898-9898

Client Email

Soniya@gmail.com

Back

Save

Edit Contact

* Only Admins and Staff can Edit the Client Details.

Caring Transitions. CT Accelerator

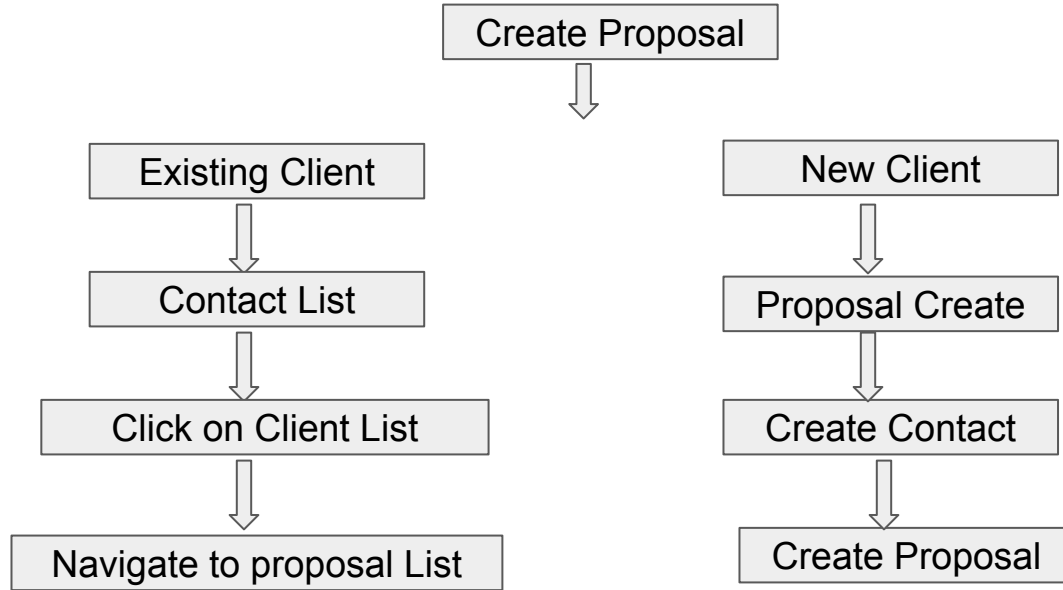
My Proposal Search Create

- Settlement
- In Progress
- Completed
- Generated
- All

Proposal Name	Status	Created Date	Modified
Soniya PS		21/05/2025	
Soniya PS		21/05/2025	21/05/2025
Sridh San	Inprogress	21/05/2025	21/05/2025
Demo Demo	Completed	21/05/2025	10/07/2025
Fgggg Hjhj	Inprogress	21/05/2025	21/05/2025
Demo Demo	Inprogress		

Proposal List

- From the Dashboard, navigate to the **Proposal List** to view all proposals.
- Click the “**Create**” button to start a new proposal.
- Use the **filter icon** to sort proposals by status and Proposal Name (e.g., In Progress, Completed, Settlement, etc.).



Proposal Create Flow

5:38

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Client Info

Contact Information

First Name *
Mery

Last Name *
Fernandos

Email *
MeryFan@gmail.com

Phone *
(985) 522-2211

Additional Phone

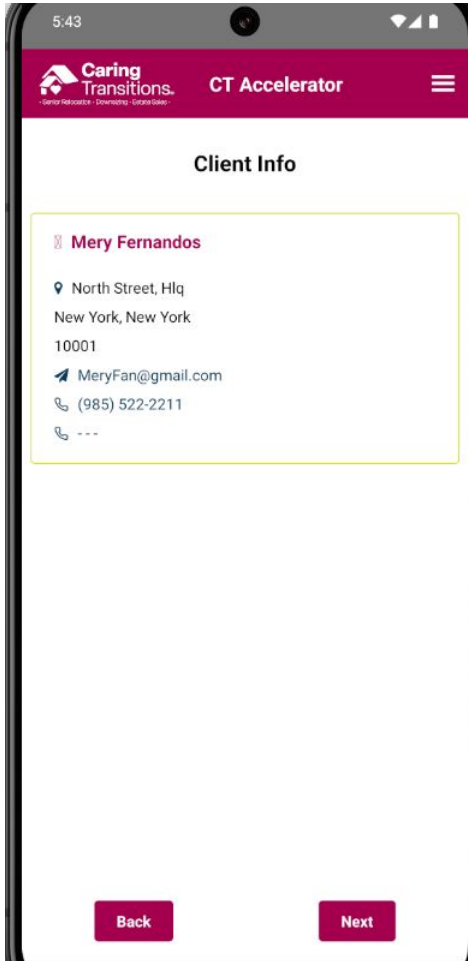
Contact Address

Address Type *

Back Save & Next

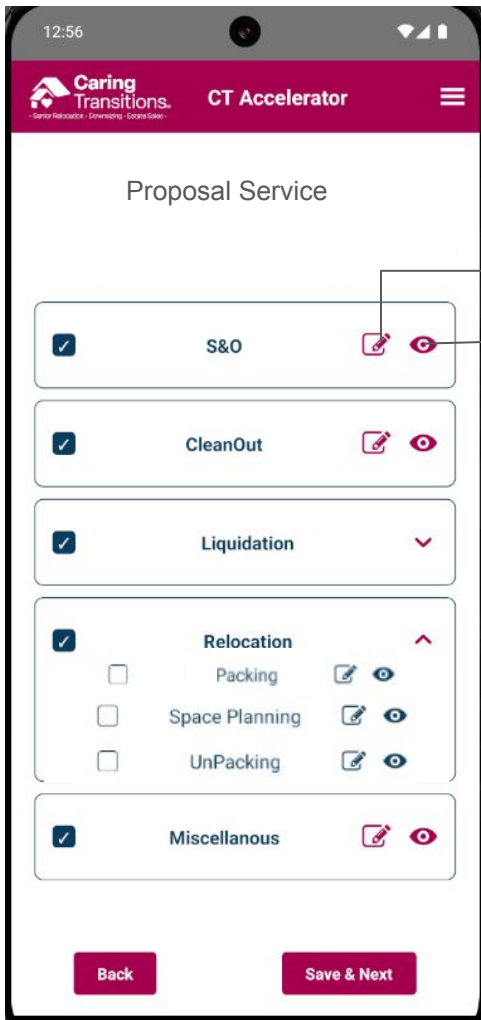
Client Info

- Users can enter contact information and address to create a proposal.
- Email and phone fields are validated based on existing records.
If the same email and phone number are used, the system will recognize it as a new proposal for the same client.
- Additional information collected here is included in the Estimate PDF.



Client Info Summary

- Here we are showing a summary of the client information



Was Disabled in Create

Was Disabled in Create

Proposal Services

* Here we are displaying the services selected at the location level.

Services Selection Flow For Sample :

S&O only

→ House Data → S&O Summary → Terms & Condition → Estimate

S&O + CleanOut

→ House Data → S&O Summary → CleanOut Summary → Terms & Condition → Estimate

Liquidation only (Online & Estate)

→ House Data → Liquidation Online Sale → Liquidation Supplies → Liquidation Estate Sale → Liquidation Summary → Terms & Condition → Estimate

S&O + CleanOut + Liquidation(Estate Sale)

→ House Data → S&O Summary → CleanOut Summary → Liquidation(Estate Sale) → Liquidation Summary → Terms & Condition → Estimate

Relocation (UnPacking) only

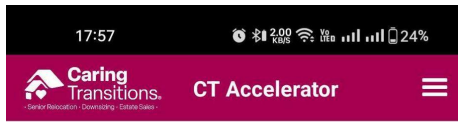
→ Relocation House Data → UnPacking → Boxes → Relocation Summary → Terms & Condition → Estimate

Relocation (Packing ,Space Planning, UnPacking) + S&O

→ House Data → S&O Summary → Packing → Space planning → Relocation House Data → UnPacking → Boxes → Relocation Summary → Terms & Condition → Estimate

Relocation (UnPacking) + CleanOut + Liquidation

→ House Data → CleanOut Summary → Liquidation Online Sale → Liquidation Supplies → Liquidation Estate Sale → Liquidation Summary →
→ Relocation House Data → UnPacking → Boxes → Relocation Summary → Terms & Condition → Estimate



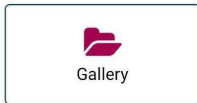
House Data

Type *
Express

Density *
High

Square Feet (sqft)
2500

Price per hour *
25



20 images/video upload total max

Back

Save & Next

House Data

- We have two types of House Data
- **Express** → Provides data based on square footage (sqft).
- **Detailed** → Provides data based on room-level details.
- **Price per Hour** → Auto-Fetched from Hourly Rate Screen - **Price per hour Per Person(PHPP)**, but users can manually override it.
- User Can add Images For Express
- User Can add images per room for Detailed



House Data

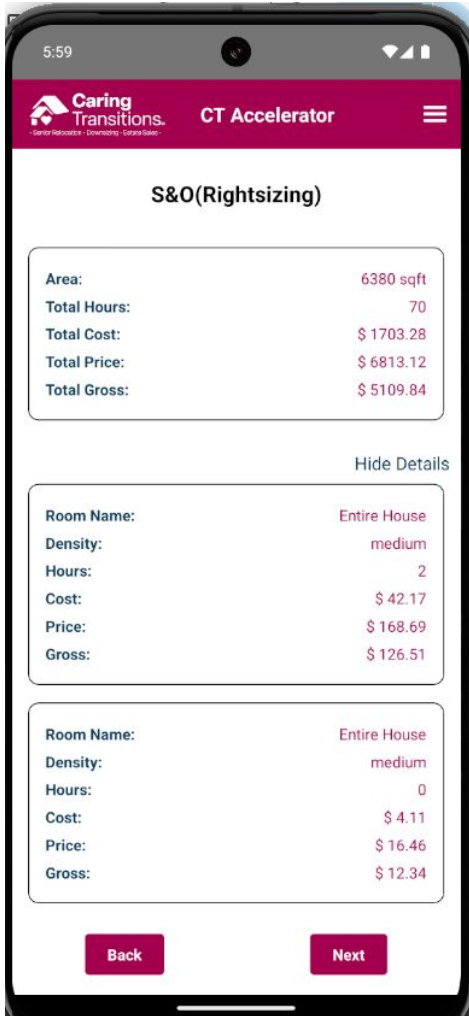
House Name	Entire House
Square Feet	24 sqft
Density	Low

Back

Next

House Data Summary

* Here we are shown the House Data Summary



S&O

- S&O values are calculated based on the House Data.
- Detailed calculations are shown below on this slide.

(Note: This screen is only enabled if the user selects **S & O** under Services.)

S & O Calculation Based on the House Data

Express : It is one time calculation

S & O Hours = [Size SqFt/Density settings-House factor]

Cost = [Hourly rates -> Loaded Hourly Rate * S & O Hour]

Price = [S&O Hour * Hourly Rate -> price per hour/House data price per hour]

Gross = [S&O Price - S & O Cost]

Detailed : Calculation to be done for each room added in the House Data

Eg : Room 1 = Length * width = Sqft

Room 2 = Length * width = Sqft

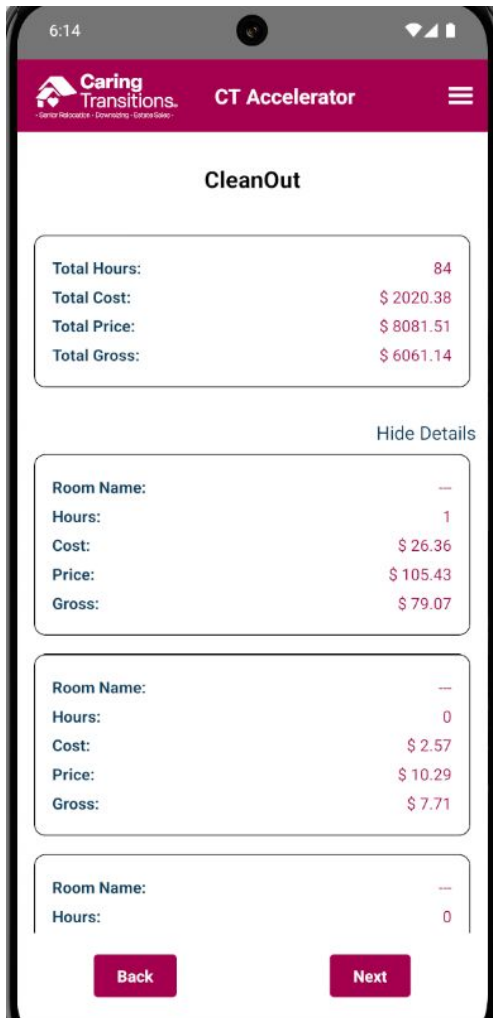
Total Sqft = Room 1 Sqft + Room 2 Sqft

S & O Hours = [Size Sqft /Density settings->House factor]

Cost = [Hourly rate -> Loaded Hourly Rate * S & O Hour]

Price = [S&O Hour * Hourly Rate -> price per hour/House data price per hour]

Gross = [S&O Price - S & O Cost]



CleanOut

- CleanOut values are calculated based on the House Data.
- Detailed calculations are shown below on this slide.

(Note: This screen is only enabled if the user selects **CleanOut** under Services.)

Cleanout Calculation

Express : It is one time calculation

Detailed : Calculation to be done for each room added in the House Data

CleanOut Hours = [Size SqFt/Density Settings->Cleanout Factor value]]

Eg : Room 1 = width * Height = Sqft
Room 2 = width * Height = Sqft
Total Sqft = Room 1 Sqft + Room 2 Sqft

CleanOut Cost = [Hourly Rate -> Loaded Hourly Rate * CleanOut Hour]

CleanOut Hours = [Size Total SqFt/Density Settings-> Cleanout Factor value]]

CleanOut Price = [CleanOut Hour * Hourly Rate -> price per hour/House data price per hour]

CleanOut Cost = [Hourly Rate -> Loaded Hourly Rate * CleanOut Hour]

Gross = [CleanOut Price - CleanOut Cost]

CleanOut Price = [CleanOut Hour * Hourly Rate -> price per hour/House data price per hour]

Gross = [CleanOut Price - CleanOut Cost]

Lots :

Express = House Data Sqft / Density Settings -Lots Factor

Detailed =

Eg : Room 1 = 200 Sqft

Room 2 = 100 Sqft

Formula = [Room 1 Sqft / Density Settings -Liquidation
Factor] + [Room 2 Sqft / Density Settings -Liquidation
Factor]

total = Sum of Room 1 + Sum of Room 2 **(if More room
added we need to Apply Above calculation)**

6:15

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Liquidation

Online Sale

Project Name: Joe Test

Lots: 346.86

Actual Lots: 250

Downsizing Left Over %: 13

Pickup Prep Start time: 05/22/2025 05:00 PM

Back Save & Next

6:15

Caring Transitions. CT Accelerator

Customer Pickup Time

Pickup Prep End Time: 05/23/2025 05:00 PM

No of Employees: 1

Price Per Hour

Pickup Start time: 05/23/2025 05:00 PM

Pickup End time: 05/27/2025 05:00 PM

No of Employees: 1

Price Per Hour

Back Save & Next

Liquidation (Online Sale)

* Project Name → user Input

* Lots → Data fetched and Calculation (See Slide 38)

* Actual Lots → user Input

* Downsizing Left over % → **What % of the items are left over. If a client is moving from a 2500 to 800 square foot home. $800/2500 = 32\%$. 68% of the stuff will be left over whether liquidated, discarded, donated ect. Downsize Left Over % = 68% of the home items.**

The recalculation would be $120 \times 68\% = 82$ Actual lots

(Note: This screen is only enabled if the user selects **Liquidation (Online Sale)** under Services.)

Liquidation Supplies



Paper

Total Cost : **314**

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	6	\$ 120.00



Tape

Cost Per Unit *	No of Unit *	Total *
\$ 24.00	5	\$ 130.00



Peanuts

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	2	\$ 40.00



Bubble Wrap

Cost Per Unit *	No of Unit *	Total *
\$ 12	2	\$ 24.00



Foam Sheets

Back

Next

Liquidation Supplies

- Only materials opted in at the location level will be displayed on this screen.
- **Cost per Unit** is fetched from the location-level Liquidation Supplies settings, but it can be overridden here.

Total :

Based on the selection Total to be summed up and shown on top.

Ex: **Paper Total + Tape Total + Peanuts**

(Note: This screen is only enabled if the user selects **Liquidation (Online Sale)** under Services.)



Liquidation

Estate Sale

Sale Start Time *

05/22/2025 05.00 PM



Sale End Time *

05/22/2025 05.00 PM



Number of Employees

1

Price per hour *

25

Back

Save & Next

Liquidation (Estate Sale)

Start time : User Input

End time : User Input

Hours : End time - Start time

Employees : User Input

Price per Hour : Auto-fetched from Hourly Rates (user can Override it)

Calculation :

Labour Hours : Hours * Employees

Cost : Labour Hours * Employees

Price : Cost * [hourly Rates-Price per Hour]

Gross : price - cost

(Note: This screen is only enabled if the user selects **Liquidation (Estate Sale)** under Services.)



Liquidation Summary

* User can Click edit option to Edit the Service

Liquidation Summary

Onlinesale Summary : Refer Sheet 42.

Hours : Ctonline Hours + Pickup Hrs

Cost : CTOOnline Cost + Pickup Cost

Price : CTOOnline Price + Pickup Price

Gross : CTOOnline Gross + Pickup Gross + total of liquidation Supplies

Estate sale Summary

Hours : Pickup Hours * No of Employees

Cost : Pickup Hours * Loaded Hourly Rate * No of Employess

Price : Pickup Price Per Hour * Pickup Hours

Gross : Price - Cost

Pickup time Calculation :

Pickup Start time : User Selected

Pickup End time : User Selected

No of employiyees : User Selected

Price per hour : Hourly Rates - Price Per Hour Per Person /

User can Enter

Hours : Pickup Hours * No of Employees

Cost : Pickup Hours * Loaded Hourly Rate * No of Employeess

Price : Pickup Price Per Hour * Pickup Hours

Gross : Price - Cost

Packing /Moving/Shipping Materials

Paper **Total Cost : 314**

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	6	\$ 120.00

Tape

Cost Per Unit *	No of Unit *	Total *
\$ 24.00	5	\$ 130.00

Peanuts

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	2	\$ 40.00

Bubble Wrap

Cost Per Unit *	No of Unit *	Total *
\$ 2	5	\$ 10.00

Foam Sheets

Back

Next

Packing /Moving/Shipping Materials

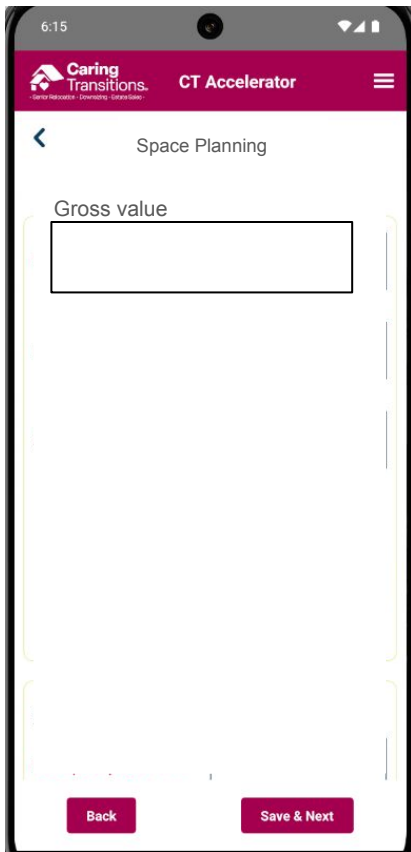
- Only materials opted in at the location level will be displayed on this screen.
- **Cost per Unit** is fetched from the location-level Packing/Moving/Shipping Materials settings, but it can be overridden here.

Total :

Based on the selection Total to be summed up and shown on top.

Ex: **Paper Total + Tape Total + Peanuts**

(Note: This screen is only enabled if the user selects **Relocation(Packing)** under Services.)



Space Planning

No calculation. Gross Price value Shown get from user

(Note: This screen is only enabled if the user selects Relocation(Space Planning) under Services.)

Relocation House Data

Type *
Express ▼

Density * ▼

Square Feet (sqft)

Price per hour *



20 images/video upload total max

Back

Save & Next

Relocation House Data

- We have two types of House Data
- **Express** → Provides data based on square footage (sqft).
- **Detailed** → Provides data based on room-level details.
- **Price per Hour** → Auto-Fetched from Hourly Rate Screen
-Price per hour, but users can manually override it.
- User Can add Images For Express
- User Can add images per room for Detailed

(Note: This screen is only enabled if the user selects **Relocation(Unpacking)** under Services.)

Relocation House Data

House Name Entire House

Square Feet 23 sqft

Density Low

Price per Hour \$21

Back

Next

Relocation House Data Summary

* Here we Shown a Relocation House Data Summary

**Refer : slide no 31(House Data
Calculation)**

Boxes



Paper

Total Cost : 314

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	6	\$ 120.00



Tape

Cost Per Unit *	No of Unit *	Total *
\$ 24.00	5	\$ 130.00



Peanuts

Cost Per Unit *	No of Unit *	Total *
\$ 20.00	2	\$ 40.00



Bubble Wrap

Cost Per Unit *	No of Unit *	Total *
\$ 2	5	\$ 10.00



Form Sheets

Back

Next

Boxes

- Only materials opted in at the location level will be displayed on this screen.
- **Cost per Unit** is fetched from the location-level Boxes settings, but it can be overridden here.

Total :

Based on the selection Total to be summed up and shown on top.

Ex: **Paper Total + Tape Total + Peanuts**

(Note: This screen is only enabled if the user selects **Relocation(Unpacking)** under Services.)

Relocation summary

Packing

Gross Value : 500

Space Planning

Gross value : 500

unPacking

Total Hours:	0
Total Cost:	\$ 0
Total Price:	\$ 0
Total Gross:	\$ 0

Boxes

Total : 321

Back

Next

Relocation(Packing & Unpacking & Space planning)

* Packing and Unpacking calculation are based on the Relocation house Data

* User can Click edit option to Edit the Service

(Note: This screen is only enabled if the user selects **Relocation(Any Services)** under Services.)

Packing :

Total cost of boxed added.

Space Planning : Value for user

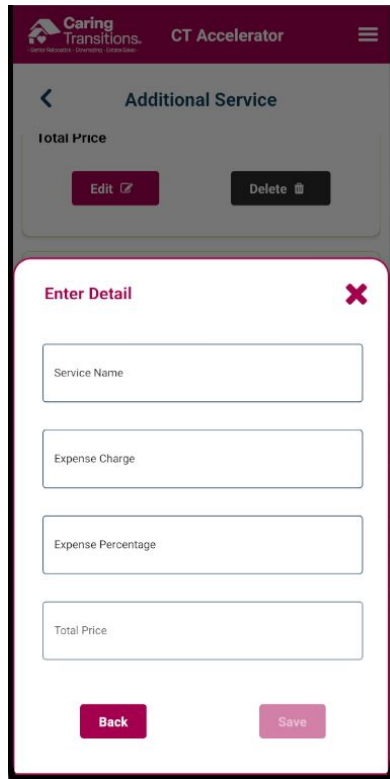
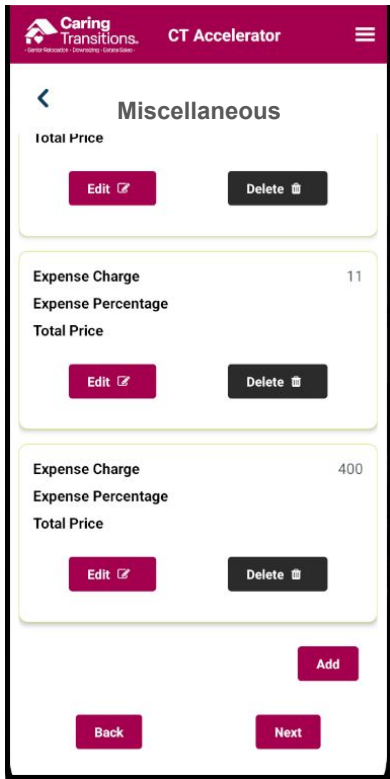
Unpacking :

Hours = Total Hours in Resettling

Price = Hourly rates -> Loaded Hourly Rate * Packing Hours

Cost = Packing hour * Hourly Rate -> Price per Hour Rate

Gross = Price - Cost + Total Cost of Boxes



Miscellaneous

* Users can add additional expenses by entering the service name, expense charge, percentage, and total price.

Calculation : Expense Charge /100*Expense Percentage

(Note: This screen is only enabled if the user selects Miscellaneous under Services.)



Miscellaneous Summary

Service name : Box
Service Expense : 20

Service name : Paints
Service Expense : 10

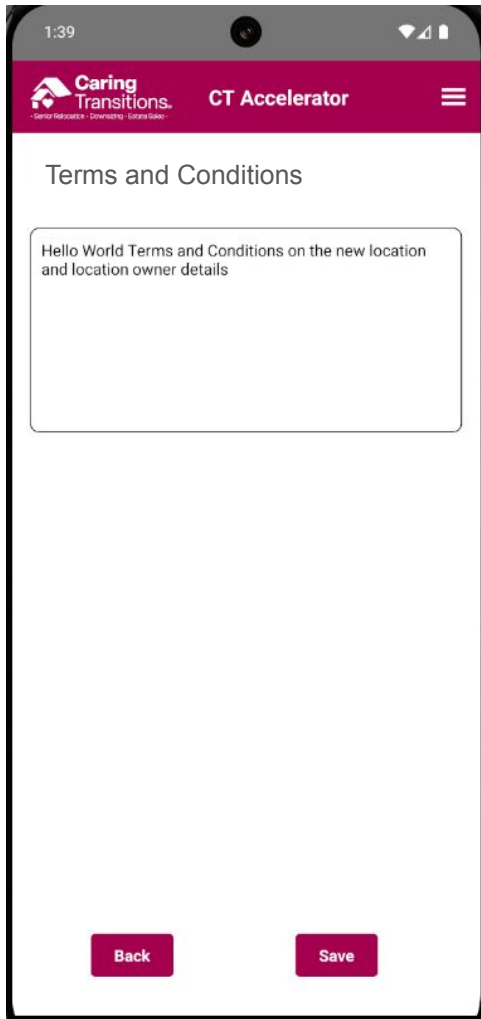
Service name : Misc
Service Expense : 15

Total : 20

Back

Next

Miscellaneous Summary



Terms and Conditions

- Additional information is fetched from the Location Settings by default.
- Users can review and overwrite this information if needed.

Caring Transitions. CT Accelerator

Estimate

Project Set-Up \$ 5456.84

Online Sale Services

% of proceeds or \$ 347 whichever is greater \$ 347

Estate Sale Services

% of proceeds or \$ 0 whichever is greater \$ 0

Clean Out Services \$ 6061.14

Relocation Services \$ 0

Miscellaneous service	\$-----
Referral Fee	\$-----
Royalty	%-----
Total Estimate	\$-----
Recommend Deposit	\$-----

Back **Save & Next**

Estimate

* Here Referral Fee, Royalty, Recommend Deposit only the User Manually Fields Otherwise all fields are Calculation fetched Fields

=> Sorting, De-cluttering and Organizing

-- Sum of S & O Price * (Royalty % + 100%)

Ex : Price [1050] , Royalty 7% = 1050 + [1050 / (100*7)]=1123.5

=> Online Sale

--Sum of (Online Sale + Liquidation Supplies total) * Royalty % + 100

Ex : (1000 + 500) + ((1500 /(100*7)) = 1605

=> Estate Sale Services

-- Liquidation Percentage : User Entered -- Should be in settings

-- sum of Estate sale Price * (Royalty% + 100%)

Ex : (1000 + 500) + ((1500 /(100*7)) = 1605

=> Clean Out Services

-- sum of Cleanout Price *(Royalty % + 100%)

=> Additional Services

-- sum of Additional Charges * (Royalty % + 100%)

=> Relocation Services

-- sum of ((Space Planning+Packing+UnPacking+BoxCost)* Royalty % + 100 %) + sum of Relocation Total

Note :

100 % = 100 Percentage

**Royalty % = Royalty
Percentage eg: 7%**

=> **Miscellaneous Service**

-- Sum of Miscellaneous service added * (Royalty % + 100%)

=> **Referral Fee [User Input]**

=> **Royalty [User Entered %]**

-- (Total Price + Referral Fee)*Royalty %

=> **Recommended Deposit [User Input]**

Note :

100 % = 100 Percentage

**Royalty % = Royalty
Percentage eg: 7%**

← Soniya PS

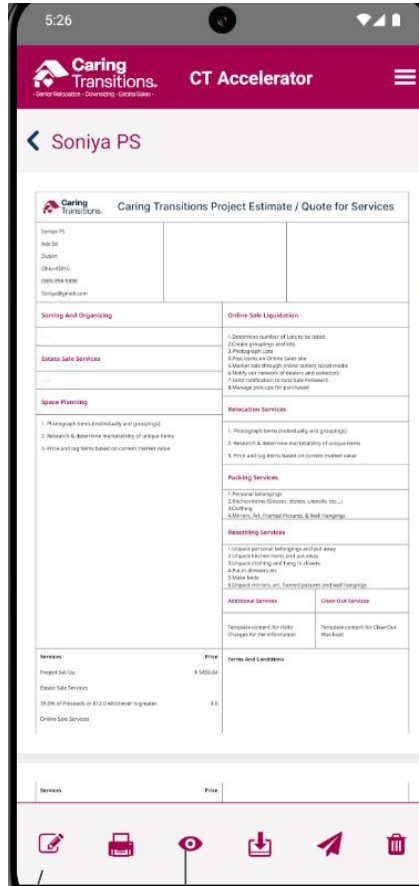
Caring Transitions. Caring Transitions Project Estimate / Quote for Services	
<p>Soniya PS Address Phone Cell-Cell Email-Email Soniya@gmail.com</p>	
Sentimental Organizing	Online Sale Liquidation
	<ol style="list-style-type: none"> Determine number of Lots to be listed Create groupings and lots Photograph Lots Post items on Online Sales site Market sale through online, online social media Make our selection of items and collections Send notification to local sale followers Manage pick-ups for purchases
Estate Sale Services	
Space Planning	Relocation Services
<ol style="list-style-type: none"> Photograph items individually and groupings Research & determine marketability of unique items Price and tag items based on current market value 	<ol style="list-style-type: none"> Photograph items (individually and groupings) Research & determine marketability of unique items Price and tag items based on current market value
	Packing Services
	<ol style="list-style-type: none"> Personal belongings Kitchen items (Glasses, dishes, utensils, etc.) Clothing Books, Art, Framed Pictures, & Mail hangings
	Resorting Services
	<ol style="list-style-type: none"> Unique personal belongings and put away Organize kitchen items and put away Unique clothing and hang in closets Put in drawers etc Make beds Organize boxes, art, framed pictures and wall hangings
	Additional Services
	Clear Out Services
	<p>Template content for media changes for the information</p> <p>Template content for CleanOut Plus tool</p>
Services	Price
Project Set Up	\$ 5400.00
Estate Sale Services	
25.0% of Proceeds or \$12.0 whichever is greater	\$ 0
Online Sale Services	

Services	Price



Estimate PDF

- Here we **show** a proposal with calculated service values and templates. We also have options to **edit** and **view** the proposals.
- Option available to **generate a proposal**.









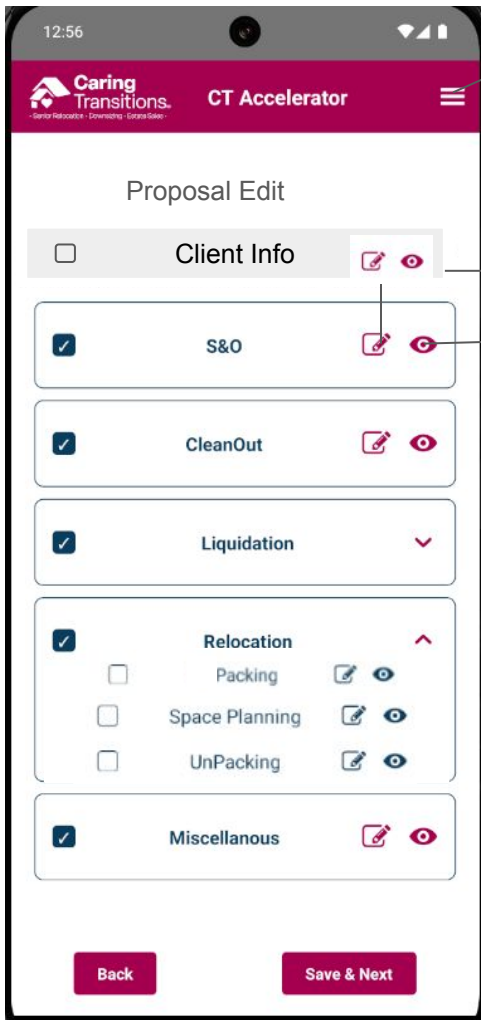
Proposal Edit(Slide 54)

Edit Service
Template(Slide 55)

—Proposal Edit Flow—

Step 1 :

- Click on a proposal to navigate to the **Template Screen**, where you can:
 - Proposal Edit or View 
 - Print 
 - Template Edit 
 - Download 
 - Share (email, whatsapp) 
 - Delete 
 -
- Once Proposal Was Generate we cannot Edit the Proposal Edit or Template Edit



Step 3

Click to Edit S&O data

Click to View S&O Summary

- The services selected in the **Location Service** will appear on the **Template** screen.
- If needed, the user can **opt in** and **edit** the services from this screen.

12:56



CT Accelerator





Template Edit


S&O  


CleanOut  

Liquidation 

Relocation 

Packing  

Space Planning  

UnPacking  

Miscellaneous  

Terms & Conditions  

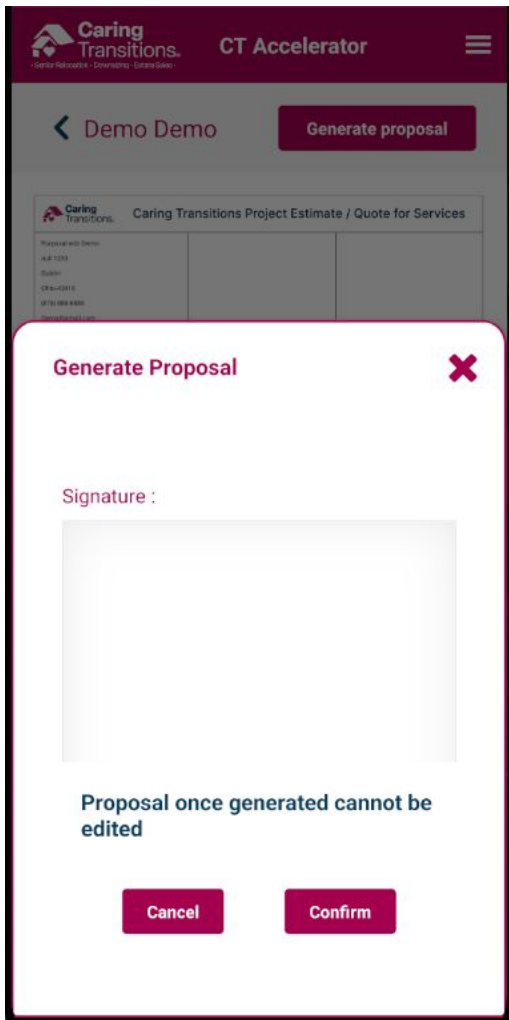
Back

Save & Next

Step 3

Click to Edit the S&O Template

Click to View the S&O Template



Generate Proposal

- Once the **Generate Proposal** button is clicked, the user can provide an E-signature to confirm the proposal.
- The proposal status will be updated to **Generated**.
- Once a proposal is generated, it **cannot be edited**.