RFQ Plugin Documentation

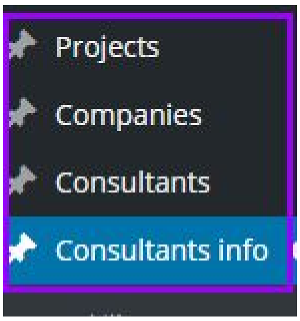
Installation:

Make sure that Woocommerce has been installed and activated before installing the RFQ for Wordpress plugin.

Download the ‘RFQ for Wordpress’ plugin zip file from your ‘My Account’ download page or via the e-mail you have received after your purchase.
Then go to your site, to the plugin page. Select ‘Add new’ and ‘Upload new plugin’. Then select the zip file that you have just downloaded. Activate the plugin. And now you’re good to go!

When activated, the RFQ for Wordpress plugin will create following pages:
1. Company registration page
2. Consultant registration page
3. Login page
4. Company dashboard
5. Consultant dashboard with:

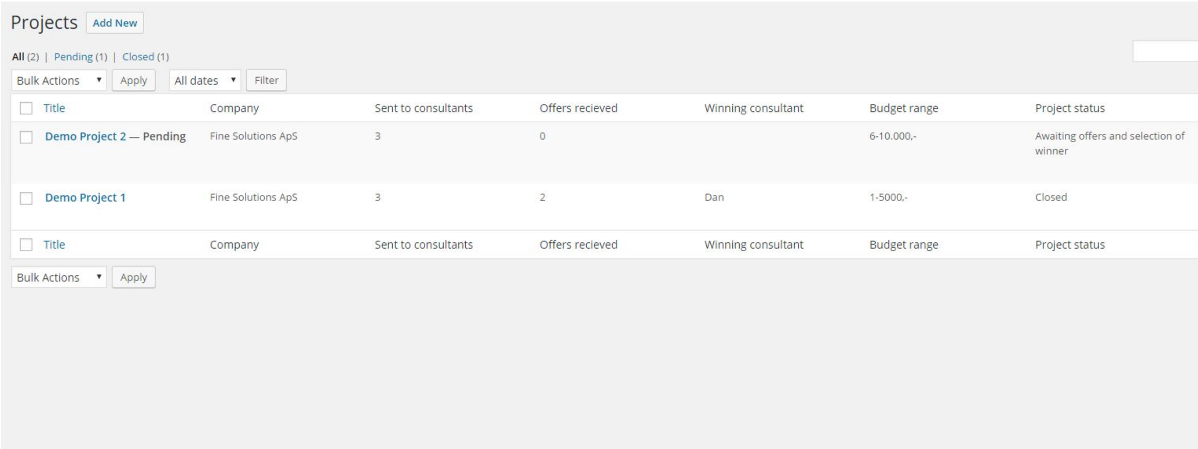
It will also add 4 new menu items to your admin dashboard:



Projects:

Here you will see a list of all the projects created
As admin you will be able to see info about the request, as well as bids and the winner. Each project will have one of these statuses:
- Awaiting approval from admin (when this is selected in the settings)
- Awaiting offers and selection of winner (when project has been sent to matching consulants)

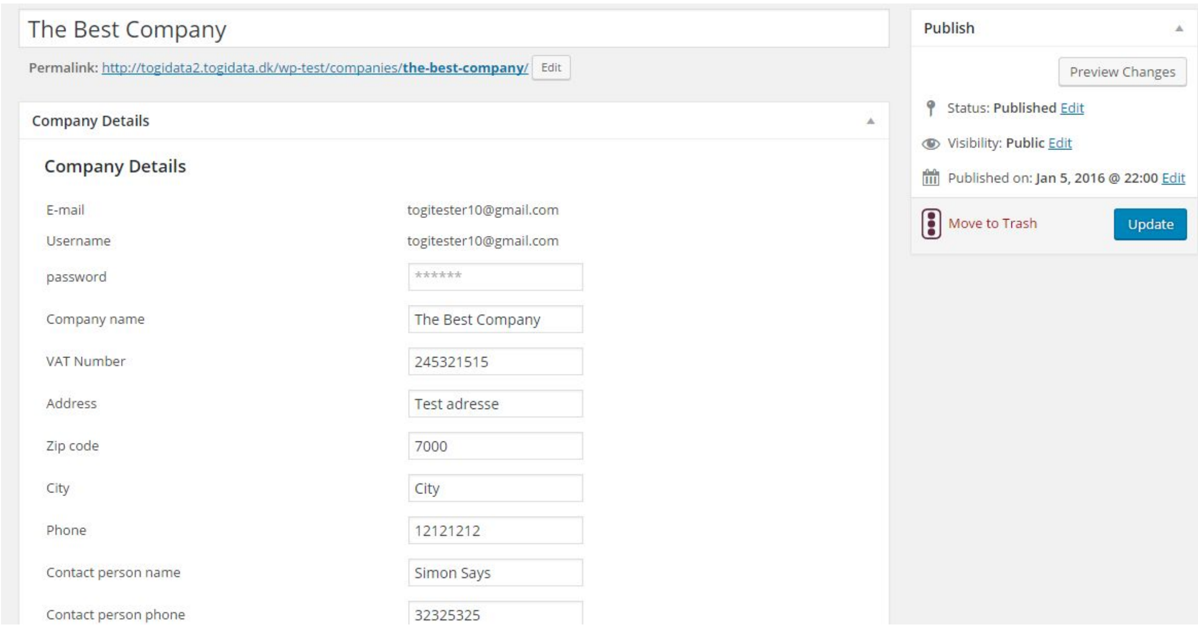
- Closed (When the company has selected a winner



Companies:

Here, all the created companies will be listed.

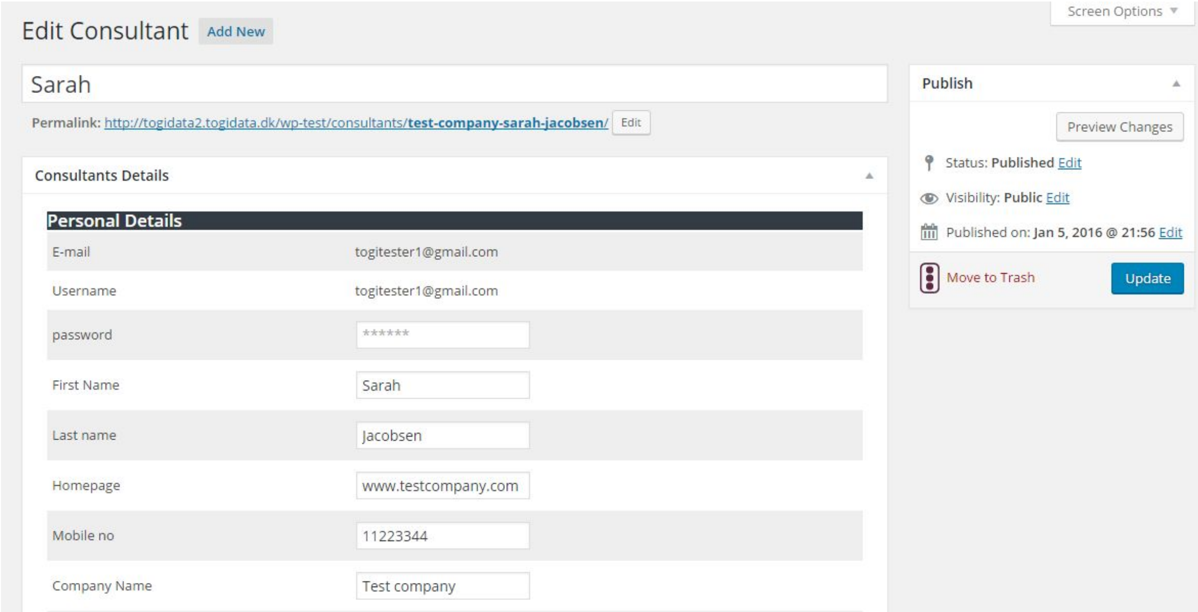
By clicking on a company name admin will also be able to see additional information about the companies.
Admin is also able to create companies directly from backend.



Consultants:

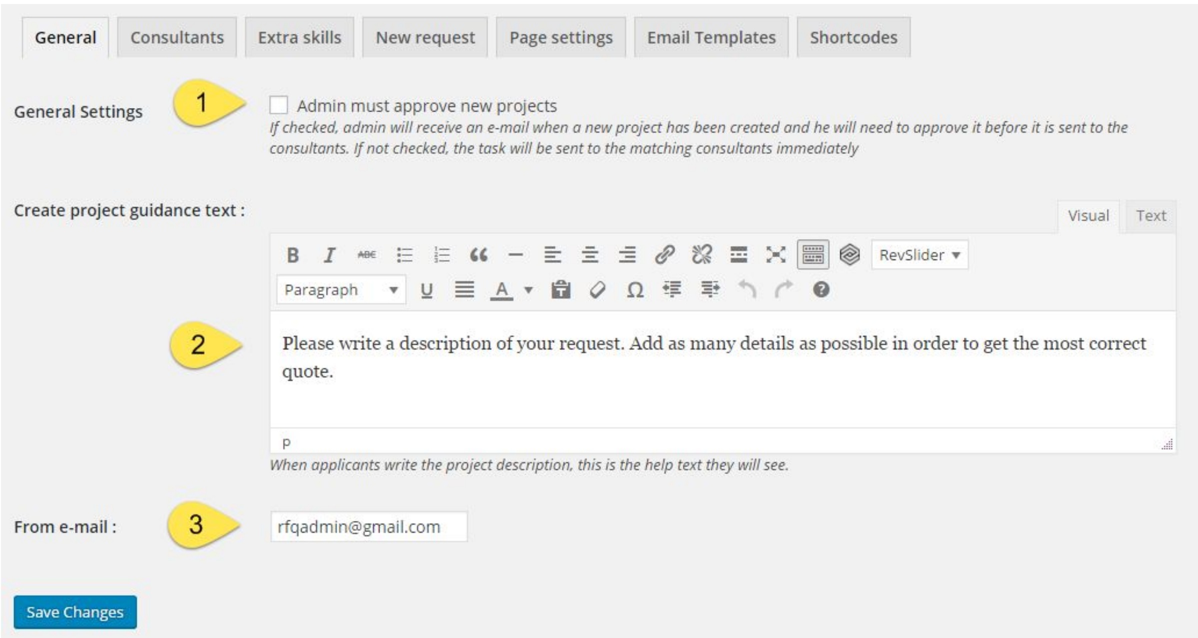
This is a user list of the companies.
Here, admin will also be able to see and edit additional information about the consultants, such as skills.

Admin is also able to create consultants directly from backend.



Settings:

The ‘General’ tab:

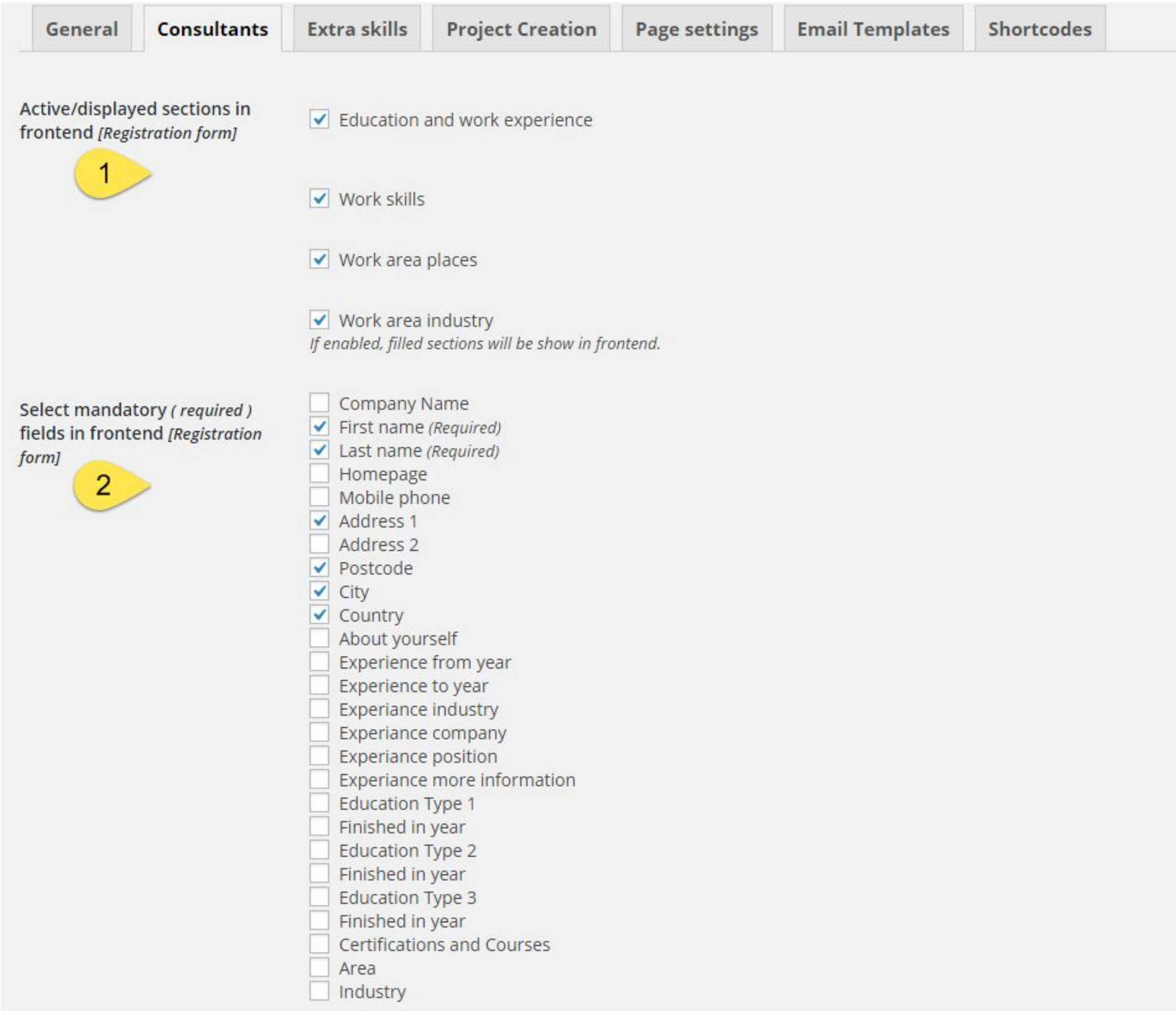


1. Here, admin decides whether newly created request should be sent directly to the matching consultants, or if admin himself wants to approve the requests before they are sent.

2. When the company creates a request, he will write a description. Here, admin can write a bit of guidance for the company. The company will see this text in frontend, when he creates the request.

3. This is the admin e-mail address, from which e-mail to companies and consultants are sent.

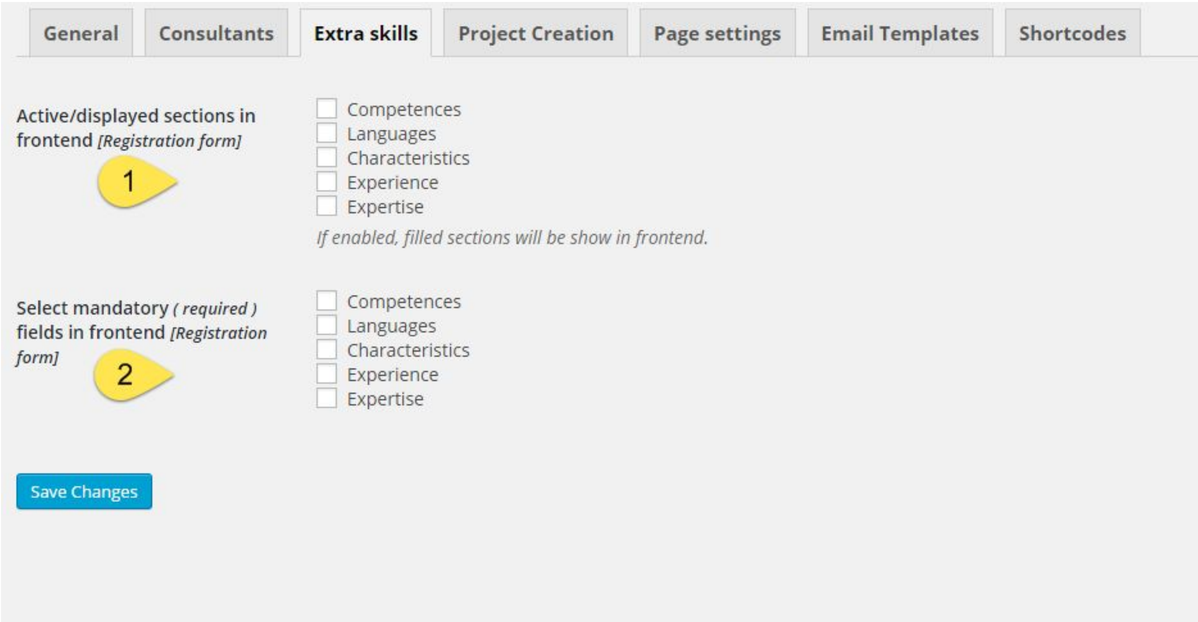
The ‘Consultants’ tab:



1. These are the 4 available sections that can be displayed in frontend, when a consultant registers. Here, admin decides which sections he wants to be displayed in frontend.

2. Here, all the available fields in the 4 sections are listed. Admin must select which he wants to display.

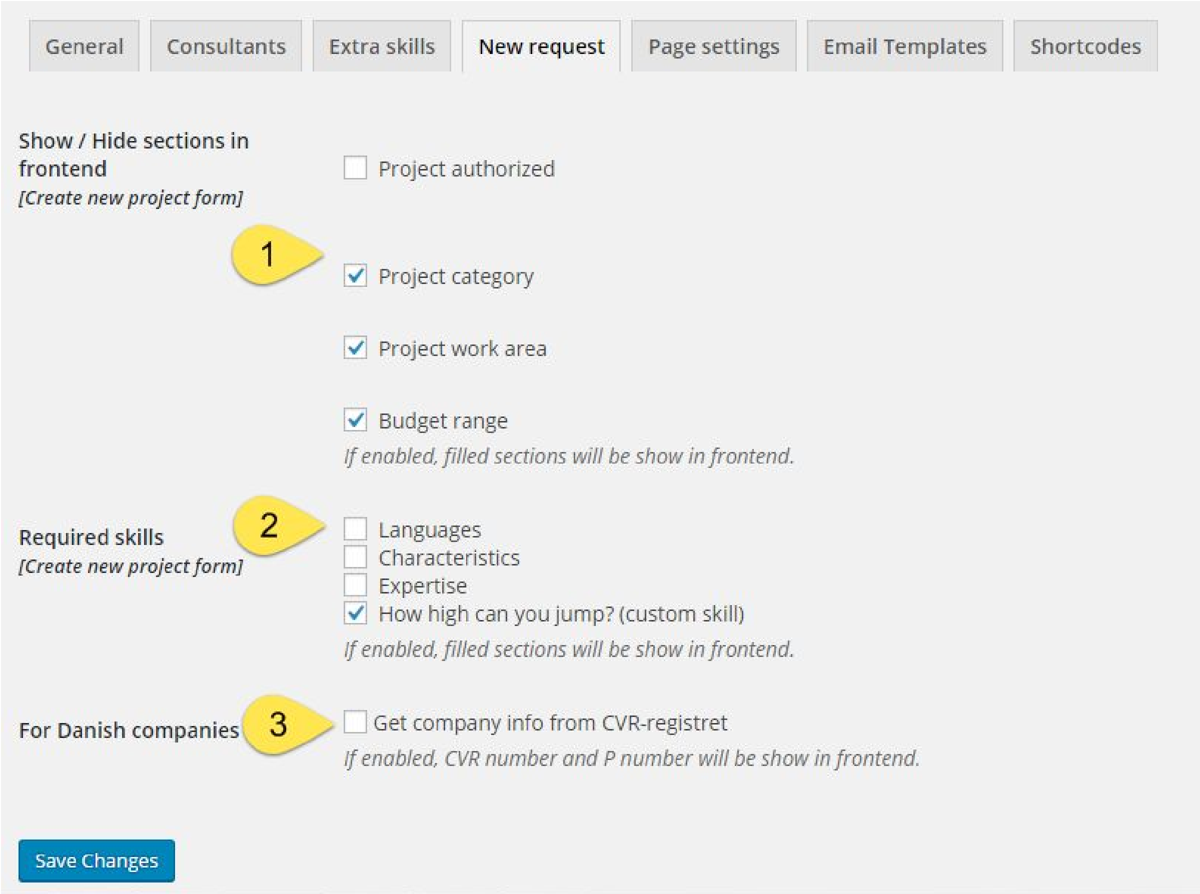
The ‘Extra skills’ tab:



1. These are the extra skills for the consultant, that admin has created in backend. Here, admin must decide which ones to display when a consultant registers.

2. Here, admin must check the extra skills that must be mandatory for the consultant to fill out.

The ‘Project creation’ tab:



1. These are the fields that are available, when a company creates a new request. So here, admin must check the fields/selections he wants available, when a company creates a new request.
By default, the project category, work area and budget range are checked..

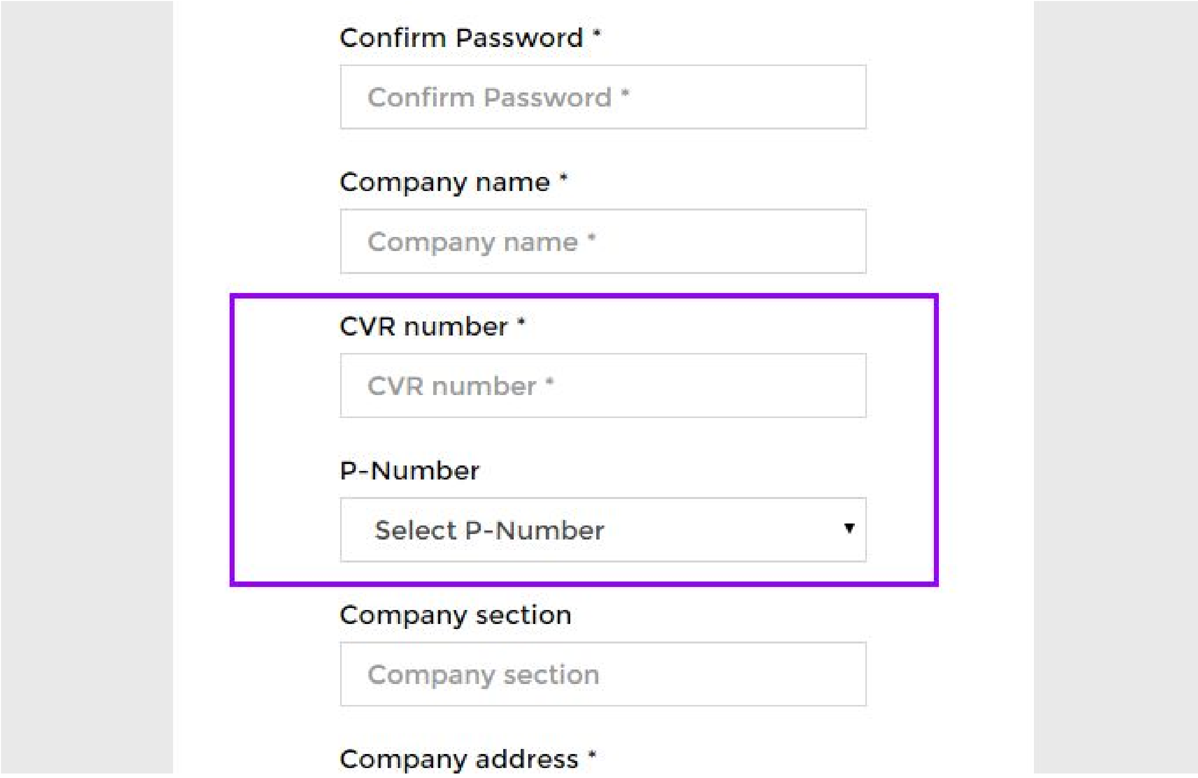
If you check the 'Project authorized' checkbox, the company will see radio button in frontend and must choose whether he will only accept offers from authorized consultants.
If not checked, this selection will not be displayed.

2. These are the consultant's extra skills. Here you can check, that some of these extra skills must be displayed, when a company creates a project.

For example, you have asked all consultants to fill out the extra skill 'language', and now, when a company creates a request, the company can select, that the request must only be sent to consultants who speaks French. In order to do this, the 'Languages' extra skill must be checked in this tab.

3. This setting only applies for Danish sites. When checked, the system will search in the CVR-register for company name/CVR number and fill out the rest of the company information.

This is how it will look in frontend, when the information will be collected centrally:



The ‘Pages’ tab:

When activated, the Companies & Consultants plugin will create following pages.:
1. Company registration page
2. Consultant registration page
3. Login page
4. Company dashboard
5. Consultant dashboard

You can then use these pages in your menu to get the structure that you wish.

The ‘E-mails’ tab:

Here, you can modify all the e-mails that are sent.

These are the e-mails, that are sent automatically:

1. Admin - when a new request has been created.
2. Company - confirmation when the company has created a request
3. Consultants - when a new request has been created, which matches their skills

4. Company - information, when a consultant has made a bid
5. Consultants - information to the consultants that lost a request
6. Consultant - information to the consultant who won a request
7. Company - when the company has selected a winner and the request will be marked as finished
8. Consultant - when the consultant try to make a bid but has no store credit.

The ‘Shortcodes’ tab:

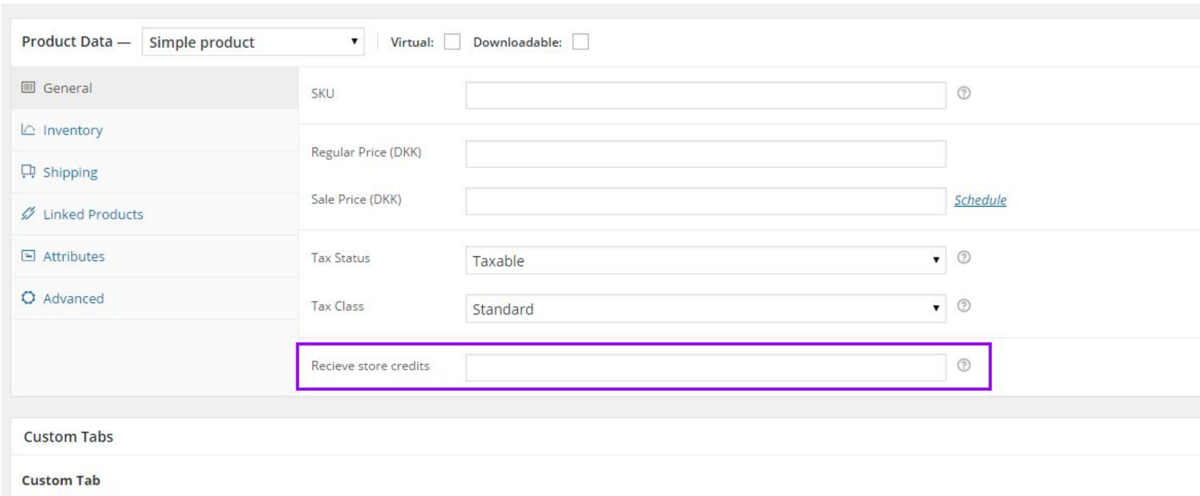
The functionalities are also available via these shortcodes:

Consultant registration: [consultant_registration]
Company registration: [rfq_company_registration]
Consultant’s dashboard: [rfq_consultant_dashboard]
Company’s dashboard: [rfq_project_dashboard]
Store credit list (for consultants): [rfq_user_credits_list]
Login page for companies as well as consultants: [rfq_login]

How will the consultants pay for using the site?

By using the store credit functionality:

When installing the plugin, you will see that a new field has been added to your products:



In order for the consultants to be able to purchase store credit from you, you must create some products. For each product, remember to set how many store credit, the product is worth.
For example, you can create three products:
1. Title: 5 store credits. Price: 50 euros (store credit field is set to 5)

2. Title: 10 store credits. Price: 90 euros (store credit field is set to 10)
3. Title: 25 store credits. Price: 200 euros (store credit field is set to 25)

Remember to make sure, that the consultants have access to the shop page in frontend.

When a consultant buys some store credit, he is actually buying a regular Woocommerce product. So setup Woocommerce like you normally would, with payment methods.

The purchased store credit will be applied to the consultant’s purchase history immediately after purchase if the payment method is Quickpay, for example.
Be aware, that if you select BACS as a payment method, the store credit will not be applied to the consultant’s store credit account, until you have confirmed to have received payment in backend.

In Woocommerce orders list, you will see all purchases.
On the ‘Store credit’ page, you will see a list of purchased and used store credit for each user.

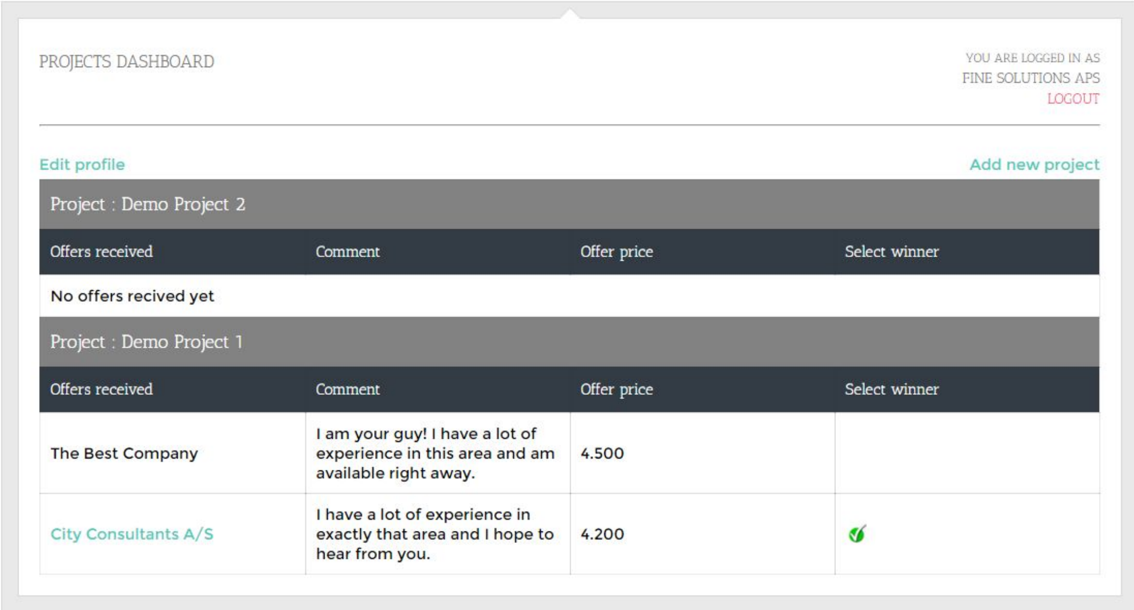
Store Credits			
advisor			
James		10	
2015-09-10	Purchases 10 store credits		10
Peter		43	
2015-09-22	Project named test project		2
2015-09-22	Purchases 10 store credits		10
2015-09-22	Purchases 25 store credits		25
2015-09-22	Purchases 10 store credits		10
Sarah		5	
sarah@gmail.com			

In order to make a bid for a request, the consultant must have the amount of store credit that winning the request will cost him. But the store credit will only be deducted from his account, if he wins the task.

If a consultant tries to make a bid for request and do not have any store credit, then he will receive a notice and an e-mail asking him to buy some store credit in order to proceed.

Company dashboard:

When you have registered as a company, you will see the company dashboard. From here, you can create projects and see all incoming offers for your projects. This is also where you select a winner.



PROJECTS DASHBOARD

YOU ARE LOGGED IN AS
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LOGOUT

Edit profile

Add new project

Project : Demo Project 2

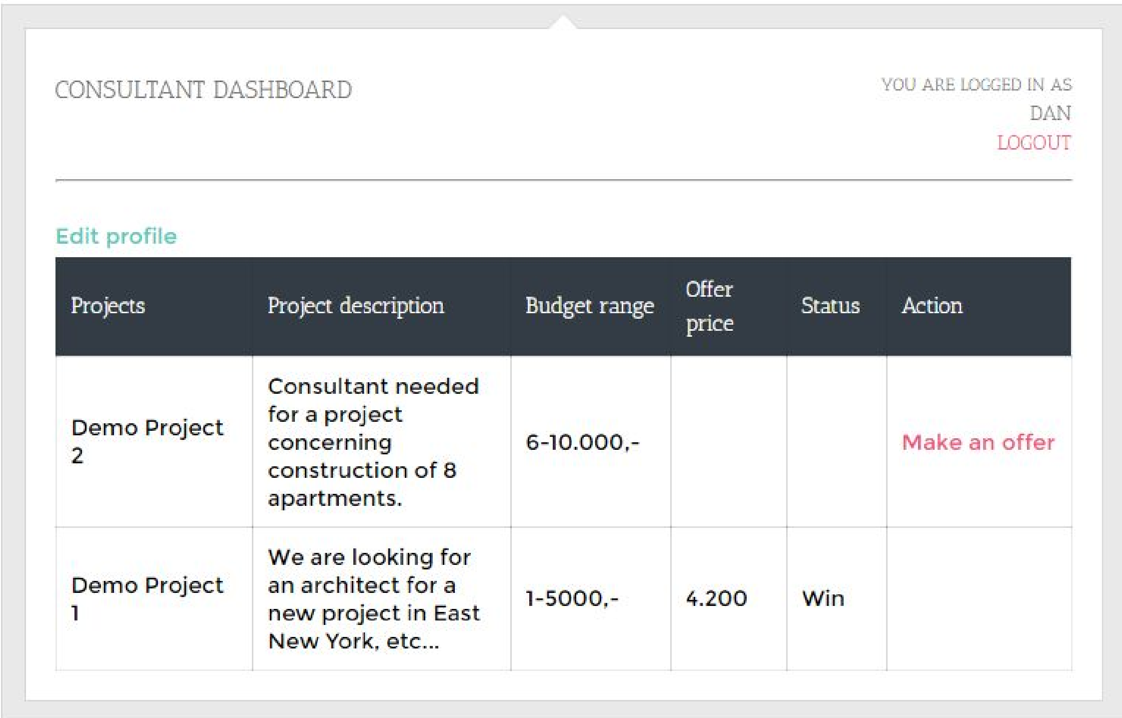
Offers received	Comment	Offer price	Select winner
No offers recived yet			

Project : Demo Project 1

Offers received	Comment	Offer price	Select winner
The Best Company	I am your guy! I have a lot of experience in this area and am available right away.	4.500	
City Consultants A/S	I have a lot of experience in exactly that area and I hope to hear from you.	4.200	✓

Consultant dashboard:

When you have registered as a consultant, you will see the consultant dashboard. Here, you will see a list of the projects matching your qualifications. My clicking 'make a bid', you will be able to bid on a project.



CONSULTANT DASHBOARD

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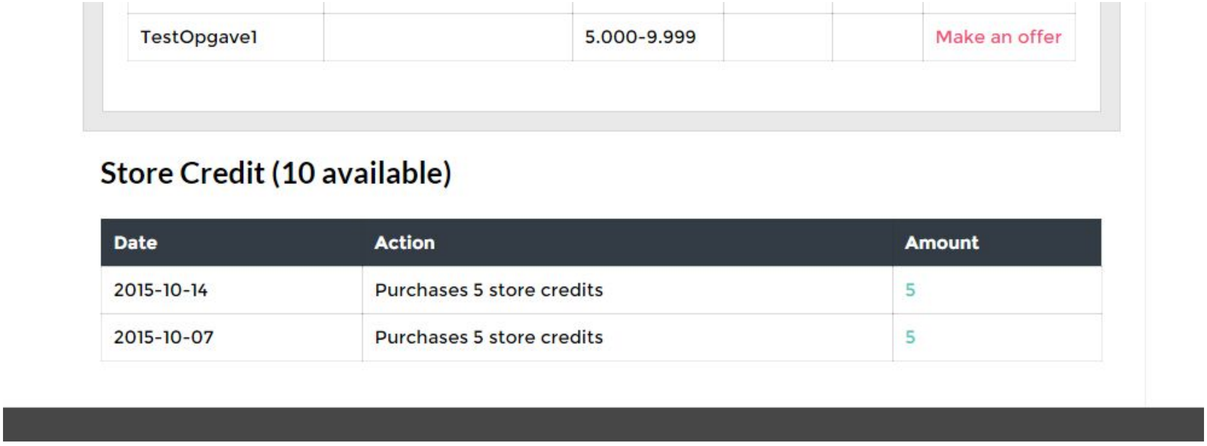
LOGOUT

Edit profile

Projects	Project description	Budget range	Offer price	Status	Action
Demo Project 2	Consultant needed for a project concerning construction of 8 apartments.	6-10.000,-			Make an offer
Demo Project 1	We are looking for an architect for a new project in East New York, etc...	1-5000,-	4.200	Win	

Below the list of projects, you will also see a list of the consultant's store credit. When it was purchased and how many store credits have been used.



TestOpgave1		5.000-9.999			Make an offer

Store Credit (10 available)

Date	Action	Amount
2015-10-14	Purchases 5 store credits	5
2015-10-07	Purchases 5 store credits	5

When the plugin is activated, the 'Consultant dashboard' is automatically created with 2 shortcodes: The shortcode for the project dashboard and the shortcode for the store credit list.
On the page, you can remove the store credit shortcode, if you wish.