

RFQ Plugin Documentation

Installation:

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

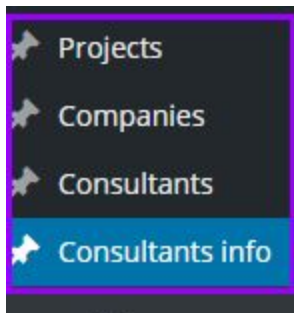
Download the 'RFQ for Wordpress' plugin zip file from your 'My Account' download page or via the e-mail you have received after your purchase.

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 consultants)

- Closed (When the company has selected a winner)

Projects [Add New](#)

All (2) | Pending (1) | Closed (1)

Bulk Actions All dates

<input type="checkbox"/>	Title	Company	Sent to consultants	Offers recieved	Winning consultant	Budget range	Project status
<input type="checkbox"/>	Demo Project 2 — Pending	Fine Solutions ApS	3	0		6-10.000,-	Awaiting offers and selection of winner
<input type="checkbox"/>	Demo Project 1	Fine Solutions ApS	3	2	Dan	1-5000,-	Closed

Bulk Actions

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.

The Best Company

Permalink: <http://togidata2.togidata.dk/wp-test/companies/the-best-company/>

Company Details

Company Details

E-mail	togitester10@gmail.com
Username	togitester10@gmail.com
password	*****
Company name	The Best Company
VAT Number	245321515
Address	Test adresse
Zip code	7000
City	City
Phone	12121212
Contact person name	Simon Says
Contact person phone	32325325

Publish

📍 Status: Published [Edit](#)

👁 Visibility: Public [Edit](#)

📅 Published on: Jan 5, 2016 @ 22:00 [Edit](#)

🗑 Move to Trash

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.

The screenshot shows the 'Edit Consultant' interface. At the top, there's a search bar with 'Sarah' and a 'Permalink' field. Below that is the 'Consultants Details' section with a 'Personal Details' sub-section. Fields include E-mail (togitester1@gmail.com), Username (togitester1@gmail.com), password (masked), First Name (Sarah), Last name (Jacobsen), Homepage (www.testcompany.com), Mobile no (11223344), and Company Name (Test company). On the right, the 'Publish' sidebar shows 'Status: Published', 'Visibility: Public', and 'Published on: Jan 5, 2016 @ 21:56'. There are 'Move to Trash' and 'Update' buttons.

Settings:

The 'General' tab:

The screenshot shows the 'General' settings tab. It has several sub-tabs: 'General', 'Consultants', 'Extra skills', 'New request', 'Page settings', 'Email Templates', and 'Shortcodes'. Under 'General Settings', there's a checkbox 'Admin must approve new projects' with a callout bubble '1'. Below it is a text box for 'Create project guidance text' with a rich text editor and a callout bubble '2'. At the bottom, there's a 'From e-mail' field with the value 'rfqadmin@gmail.com' and a callout bubble '3'. A 'Save Changes' button is at the bottom left.

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:

General Consultants Extra skills Project Creation Page settings Email Templates Shortcodes

Active/displayed sections in frontend [Registration form]

1

- Education and work experience
- Work skills
- Work area places
- Work area industry
If enabled, filled sections will be show in frontend.

Select mandatory (required) fields in frontend [Registration form]

2

- Company Name
- First name (Required)
- Last name (Required)
- Homepage
- Mobile phone
- Address 1
- Address 2
- Postcode
- City
- Country
- About yourself
- Experience from year
- Experience to year
- Experience industry
- Experience company
- Experience position
- Experience more information
- Education Type 1
- Finished in year
- Education Type 2
- Finished in year
- Education Type 3
- Finished in year
- Certifications and Courses
- Area
- Industry

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:

The screenshot shows a configuration interface with a horizontal menu at the top containing tabs: General, Consultants, Extra skills, Project Creation, Page settings, Email Templates, and Shortcodes. The 'Extra skills' tab is active. Below the menu, there are two sections:

- Active/displayed sections in frontend [Registration form]**: A yellow callout bubble with the number '1' points to this section. To its right is a list of five items, each with an unchecked checkbox: Competences, Languages, Characteristics, Experience, and Expertise.
- Select mandatory (required) fields in frontend [Registration form]**: A yellow callout bubble with the number '2' points to this section. To its right is a list of the same five items, each with an unchecked checkbox.

Below these sections is a blue button labeled 'Save Changes'. A note below the first list reads: 'If enabled, filled sections will be show in frontend.'

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:

General Consultants Extra skills **New request** Page settings Email Templates Shortcodes

Show / Hide sections in frontend
[Create new project form]

Project authorized

1 Project category

Project work area

Budget range
If enabled, filled sections will be show in frontend.

Required skills
[Create new project form]

2 Languages
 Characteristics
 Expertise
 How high can you jump? (custom skill)
If enabled, filled sections will be show in frontend.

For Danish companies **3** Get company info from CVR-registret
If enabled, CVR number and P number will be show in frontend.

Save Changes

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:

Confirm Password *

Company name *

CVR number *

P-Number

Company section

Company address *

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:

The screenshot shows the WordPress product editor interface. At the top, there's a 'Product Data' section with a dropdown menu set to 'Simple product' and checkboxes for 'Virtual' and 'Downloadable'. Below this is a sidebar with navigation tabs: 'General', 'Inventory', 'Shipping', 'Linked Products', 'Attributes', and 'Advanced'. The 'Advanced' tab is selected, showing several fields: 'SKU', 'Regular Price (DKK)', 'Sale Price (DKK)', 'Tax Status' (set to 'Taxable'), and 'Tax Class' (set to 'Standard'). A new field, 'Recieve store credits', is located at the bottom of the 'Advanced' tab and is highlighted with a purple rectangular border. Below the 'Advanced' tab is a 'Custom Tabs' section with a 'Custom Tab' entry.

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			
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 FINE SOLUTIONS APS
LOGOUT

[Edit profile](#) [Add new project](#)

Project : Demo Project 2

Offers received	Comment	Offer price	Select winner
No offers received 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

YOU ARE LOGGED IN AS DAN
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
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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.