**Expert Dashboard – Functional Requirements Document (FRD)**

### **Section 1: Profile Settings (Personal Information)**

#### **Elements:**

* Logo: Displayed at the top (consistent with the rest of the platform).
* Top Navigation Menu: Includes icons for Profile, Availability, My Fees, Expertise & Industries, Charity, and Socials.
* Profile Picture: Circular image at the top left of the page.
* Personal Information Section:  
  + Full Name (editable)
  + Phone Number (editable)
  + Position (editable)
  + Gender (editable)
  + Email (editable)
  + Company (editable)
  + Timezone (editable)
  + Language Preference (editable)
  + Bio (editable)
* Save & Discard Buttons: Buttons at the bottom for saving or discarding changes.

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#### **Functionality:**

* Editable Fields: Allows the user to edit and save personal information.
* Save Button: Saves changes to the profile information.
* Discard Button: Discards any changes made without saving.
* Navigation Tabs: Easy access to profile settings, availability, and other profile options.

## **Section 2 : Get Verified**

**Elements**

* Header: “Get Verified on Taptime”
* Subtext: “Show your audience you’re real. Share your booking link, tag us, and we’ll verify you fast.”
* Steps List:  
  + **Step 1:** Add your booking link in at least one social media channel (LinkedIn / X / Threads / TikTok / Instagram).
  + **Step 2:** Tag @taptime.ai.
  + **Step 3:** You will be verified within 72 hours.
  + **Step 4:** Share your post link → Input field (“Paste Here...”).
* CTA Button: “Get Verified”.

**Functionality**

* The input field accepts valid URL format only (http/https).
* “Get Verified” button is enabled only if the Step 4 link field is filled.
* On submission:  
  + The system stores links in DB (linked to user profile).
  + Verification request is flagged for admin review/auto-check.
* User receives confirmation (popup or email).
* Verification status updates in profile within 72 hours.
* Modal can be closed anywhere in the screen without losing progress.

**Section 3: Availability**

#### Elements:

* Date Picker: Allows the user to select a date to manage availability.
* Slot Duration: Dropdown to select the slot duration (e.g., 30 minutes).
* Buffer Time: Dropdown for selecting buffer time between meetings.
* Calendar Integration: Shows the user's availability in a Selected view.
* Availability Slots: Color-coded slots representing available or booked times.
* Save Availability Button: Saves the set availability.
* Connect Calendly Button: Option to sync with Calendly.
* Time Zone

#### **Functionality:**

* Calendar Display: Shows available and booked times for the selected week.
* Availability Editing: The user can update their availability by selecting time slots and dates.
* Save Button: Saves any changes made to availability.
* Connect Calendly Button: Syncs availability with Calendly (external integration).

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### **Section 3: My Fees**

#### **Elements:**

* Consultation Charges Section: Editable fields for setting fees.  
  + Platform Fee: Percentage displayed (20% per transaction).
  + Fee for Single Session: Editable amount for a single session fee.
  + Fee for Bundle Session: Editable amount for bundle sessions.
* Client Pays: Display of how much the client pays, and how much the expert receives after platform fees.
* Bundle Details Section: Fields for setting up bundle session details.  
  + Number of Sessions: Dropdown to select the number of sessions.
  + Validity Period: Dropdown to select session validity period.
  + Duration of Each Session: Duration in minutes.
  + Mode of Session: Dropdown for selecting the mode of session (Zoom/Google Meet).
* Save & Discard Buttons: Options for saving or discarding changes.

#### **Functionality:**

* Editable Fields: Users can set their consultation fees and package details.
* Fee Calculation: Automatic calculation showing what the client pays and what the expert receives.
* Bundle Setup: Users can create a bundle of sessions with a fixed number of sessions and validity period.
* Save Button: Saves changes to the fees or bundle setup.
* Discard Button: Discards any changes made without saving.

### **Section 4: Expertise & Industries**

**Elements:**

* **Expertise Section:**
  + Category and Sub-category dropdowns.
  + Tags showing selected expertise (e.g., Leadership & Team Building, Scaling Startups, etc.).
  + “...” menu with options: **Add Expertise** / **Delete**.
* **Industries Section:**
  + Pre-defined industries with icons (e.g., Business & Startups, Technology & Innovation, Finance & Economics, Health & Wellness).
  + Category and Sub-category dropdowns.
* **Buttons:**
  + **Save** (green).
  + **Discard changes** (beige).

**Functionality:**

* Add/Edit/Delete areas of expertise.
* Assign industries relevant to the profile.
* Dropdowns allow precise categorization.
* Save button stores changes.

### **Section 5: Charity**

**Elements:**

* **Section Header:** *Donate for charity (Optional)*.
* **Description:** Clarifies that Taptime does not handle transactions, user manages donations directly.
* **Input Fields:**
  + Charity Name (text input).
  + Charity Website URL (text input).
* **Buttons:**
  + Save.
  + Discard changes.

**Functionality:**

* Lets experts showcase their charitable causes.
* Displayed in profile to inspire clients.
* Save button records charity info.

### **Section 6: Socials**

**Elements:**

* **Input Fields:**
  + LinkedIn Profile.
  + X (Twitter) Profile.
  + Reddit.
  + Threads.
* **Buttons:**
  + Save.
  + Discard changes.

**Functionality:**

* Allows experts to link their social media profiles for broader visibility.
* Provides trust and credibility through public presence.
* Save button stores links.

### **Section 7: Explore Experts**

**Elements:**

* **Header:** “Access global experts and schedule one-on-one video sessions.”
* **Search Bar:** Free text search (placeholder: *Search for your expertise, advice, coaching, mentorship*).
* **Filter Button:** For refining results.
* **Category Chips:** Horizontal scrollable chips for filtering expertise (e.g., Fundraising, Pitch Deck, Business Model Validation).
* **Expert Cards (Grid Layout):**
  + Profile Picture.
  + Name + Title/Position.
  + Badge (e.g., *Top Expert*, *Top Mentor*, *Top Voice*).
  + Charity Label (*Donating proceeds to charity*).
  + Price (e.g., $500/session).
  + Star Rating.
  + Tags (e.g., Entrepreneurship, E-commerce, Growth Hacking).
* **Load More Button:** Loads more experts.

**Functionality:**

* Users can browse experts by category or keyword search.
* Experts are visually highlighted with badges and charity info.
* Clicking an expert card should open detailed expert profile with booking options.
* Load More fetches additional expert profiles dynamically.

**Section 8: Charity**

**Elements**

* Tab: “Charity” (within Profile Settings navigation: My Profile, Availability, My Fees, Expertise & Industries, Charity, Socials).
* Header: “Donate for charity (Optional)”.
* Instructional text: *“Inspire others by supporting a cause you love. (You’ll manage donations directly — Taptime doesn’t handle transactions).”*
* Form Fields:  
  + **Charity Name** (text input).
  + **Charity Website URL** (text input, must be valid URL).
* Action Buttons:  
  + **Save** (primary, green).
  + **Discard changes** (secondary).

**Functionality**

* Charity fields are **optional**.
* “Save” button only activates when a change has been made.
* On clicking “Save”:  
  + Inputs are validated (non-empty Charity Name, valid URL format for Website).
  + Data is stored in the user’s profile in DB.
  + Confirmation message shown (“Charity details updated successfully”).
* On clicking “Discard changes”:  
  + Resets inputs to previously saved state.
* Displayed charity info is visible in the user’s public profile if provided.

**Section 9: Socials Tab**

**Elements:**

* **Socials Section:**
  + LinkedIn Profile (input).
  + Reddit Profile (input).
  + X (Twitter) Profile (input).
  + Threads Profile (input).
* **Buttons:**
  + Save (green).
  + Discard Changes (beige).

**Functionality:**

* Users can add/update links to their social media profiles.
* Input fields validate URL format.
* Save button updates changes to the user’s profile (stored in DB).
* Discard changes reverts to previously saved state.
* Updated socials appear on the expert’s public profile for credibility.

### **Section 10: Explore Experts**

**Elements:  
Dashboard view:**

* Home
* Browse Experts
* Meetings
* Payments
* Rating and Reviews
* Favorites
* Profile
* Setting
* Logout

**Functionality:**

* User can select any icon for redirecting to the dedicated dashboard pages.

### **Section 11: Account Settings**

**Elements:**

* **Header:** “Settings”
* **Profile Picture Section:**
  + Upload new picture (PNG/JPEG < 15MB).
  + Delete picture.
* **Edit Settings Form:**
  + Full Name (editable).
  + Position (editable).
  + Country (editable).
  + Email (editable).
  + Phone Number (editable).
* **Change Password Section:**
  + Old Password (input).
  + New Password (input).
  + Confirm Password (input).
* **Buttons:**
  + Save (green).
  + Cancel (beige).
  + Change Password (green).
  + Delete <https://docs.google.com/document/d/1F-tbXljYhU5wL0ue9gAKGj-dDyLw7XR_BGkcSiL1Vu8/edit?usp=sharing>

**Functionality:**

* Upload validates file type/size.
* Editable fields allow updating personal details.
* Save updates information in DB.
* Cancel resets fields to previous values.
* Password update requires:  
  + Old password match.
  + New password meeting complexity rules.
  + Confirmation match.
* Success/error messages displayed after update.

### **Section 12: Meetings (Upcoming & Completed)**

**Elements:**

* **Header:** “All Meetings”
* **Tabs:** Upcoming Meetings / Completed Meetings.
* **Meeting Table Columns:**
  + Name.
  + Email.
  + Date.
  + Time.
  + Duration / Number of Sessions.
  + Action (Join).
* **Buttons/Links:**
  + Join (green).
* **Pagination Controls:**
  + Lines per page (dropdown).
  + Page navigation arrows.

**Functionality:**

* Default view shows “Upcoming Meetings.”
* Completed Meetings can be viewed by switching tab.
* Meeting data displayed in tabular form, sorted by date/time.
* “Join” link/button launches meeting session.
* Pagination loads meetings per selected rows (default 10 per page).
* User can navigate pages using arrows or page numbers.

* Completed meetings will have download and delete options for Meeting details

## **Section 13: Dashboard Overview**

### **Elements:**

* **Left Navigation Menu:**
  + Home (active).
  + Dashboard.
  + Experts.
  + Meetings.
  + Favorites.
  + Profile.
  + Settings.
  + Logout.
* **Dashboard Cards (Top Section):**
  + **Earnings Card:**
    - Icon (money bag).
    - Text: *Earned $3400*.
    - Button: *View Details* (green).
  + **Meetings Count Card:**
    - Icon (people/meetings).
    - Text: *Total number of meetings: 08*.
    - Button: *View Details* (green).
  + **Payment Request Card:**
    - Icon (bank).
    - Text: *Bank Setup*.
    - Button: *Setup Bank Details* (green).
  + **Withdrawal Options Card:**
    - Icon (ATM).
    - Text: *Withdrawal request*.
    - Button: *View Transaction* (green).
* **Upcoming Meetings Table:**
  + Columns: Name | Email | Date | Time | Duration | Actions.
  + Example Rows:  
    - Harry Brooks | brooks@gmail.com | 3rd Sep 2025 | 10:00 AM | 60 Minutes | Join.
    - Isabella Grace Harrington | isabell209@gmail.com | 4th Sep 2025 | 10:00 AM | 1 Session | Join.
    - Sophia Martinez | martinez999@gmail.com | 5th Sep 2025 | 10:00 AM | 6 Sessions | Join.
  + Actions column contains *Join* button (green).
* **Notification Icon (top-right corner).**

### **Functionality:**

* **Dashboard Cards:**
  + *View Details* (Earnings): Opens breakdown of expert’s earnings.
  + *View Details* (Meetings): Opens meeting history/log.
  + *Setup Bank Details*: Redirects to Payment Setup page.
  + *View Transaction*: Opens withdrawal request history.
* **Upcoming Meetings Table:**
  + Displays next scheduled meetings in chronological order.
  + “Join” button opens meeting session directly.
  + Table dynamically updates based on user’s upcoming meetings.
* **Navigation Menu:** Provides quick access to other app sections.
* **Notification Icon:** Displays pending alerts/updates.

## **Section 14: Bank Information Setup**

### **Elements:**

* **Modal Header:**
  + Title: *Bank information*.
* **Input Fields:**
  + **Bank Account**\* (mandatory, numeric input).
  + **Account Number**\* (mandatory, numeric input).
  + **IBAN** (alphanumeric input, optional if account number is used).
  + **Bank Name** (text input).
  + **Routing Number** (numeric input).
  + **Branch**
    - City (text input).
    - State (text input).
  + **Country** (dropdown list).
* **Action Buttons:**
  + **Save** (green, primary action).
  + **Cancel** (secondary action, beige).

### **Functionality:**

* **Validation Rules:**
  + *Bank Account* and *Account Number* are mandatory.
  + Only numeric values accepted for account fields and routing number.
  + IBAN must follow international IBAN format (if provided).
  + Country must be selected from dropdown.
* **Save Button:**
  + Active only when required fields are filled.
  + On click:  
    - Validates inputs.
    - Stores bank information in database linked to user profile.
    - Displays confirmation message (“Bank details saved successfully”).
* **Cancel Button:**
  + Closes modal without saving.
  + Restores previous state.
* **Modal Behavior:**
  + Opens when *Setup Bank Details* is clicked from Dashboard Overview.
  + Can be closed via Cancel or outside click.
  + Responsive layout adapts to screen sizes.

## **Section 15: Withdrawal Details**

### **Elements:**

* **Modal Header:**
  + Title: *Withdrawal Details*.
* **Input Fields:**
  + **Amount to Withdraw**\* (numeric input, required).
  + **Payment Method**\* (dropdown; default = Bank Transfer).
  + **Account Details Preview** (read-only; shows linked account info).  
    - Link: *Update Payment Information* → opens Bank Information modal.
  + **Notes (Optional)** (text input).
* **Action Buttons:**
  + **Save** (green, primary action).
  + **Cancel** (beige, secondary action).

### **Functionality:**

* **Validation Rules:**
  + *Amount to Withdraw* is mandatory and must be greater than zero.
  + *Payment Method* must be selected from dropdown.
  + System checks if account details are set before allowing submission.
* **Save Button:**
  + Enabled only when required fields are filled.
  + On click:  
    - Validates inputs.
    - Creates withdrawal request entry in database.
    - Sends confirmation (popup + email).
    - Displays updated balance in *Dashboard Overview*.
* **Cancel Button:**
  + Closes modal without saving.
  + Restores previous state.
* **Modal Behavior:**
  + Opens when *Withdrawal Request* is clicked on Dashboard Overview.
  + Can be closed via Cancel or outside click.
* **Error Handling:**
  + If no bank info is stored → prompt user to update via *Update Payment Information*.
  + If withdrawal exceeds balance → show error message (“Insufficient funds”).

## **Section 16: Reviews**

### **Elements:**

* **Header:** *Reviews*.
* **Stats Cards (Top Section):**
  + **Total Reviews:**
    - Label: *Total Reviews*.
    - Value: *160*.
    - Subtext: *Number of reviews of all time*.
  + **Average Ratings:**
    - Value: *4.8*.
    - Star display (5-star scale).
    - Breakdown bar chart:  
      * 5 stars: 120.(This many users reviewed)
      * 4 stars: 25.
      * 3 stars: 07.
      * 2 stars: 05.
      * 1 star: 03.
* **Reviews Table:**
  + **Columns:** Name | Ratings & Reviews | Date | Actions.
  + **Row Elements:**
    - Profile picture.
    - User Name + Email.
    - Rating (numeric with star icon).
    - Review text.
    - Date of review.
    - Actions (icons):  
      * Delete (trash icon).
      * Edit (pencil icon).
  + **Example Rows:**
    - Harry Brooks | 5 stars | “The session was extremely insightful...” | 3rd Sep 2025 | Actions.
    - Isabella Grace Harrington | 4 stars | “I really appreciated the patience...” | 4th Sep 2025 | Actions.
    - Sophia Martinez | 4 stars | “Highly professional and knowledgeable...” | 5th Sep 2025 | Actions.
    - Robin Grace Harrington | 4 stars | “Felt like talking to a mentor...” | 5th Sep 2025 | Actions.
    - Emily Carter | 3 stars | “The expert gave me practical advice...” | 6th Sep 2025 | Actions.
    - Sophie Grace Harrington | 3 stars | “Super easy to understand...” | 6th Sep 2025 | Actions.
* **Pagination:**
  + Current page (highlighted).
  + Next/Previous arrows.
  + Total pages (5).
  + Dropdown: *Lines per page* (default 10).
* **Footer:** Total review count displayed (e.g., *Total: 6*).

### **Functionality:**

* **Stats Section:**
  + Displays real-time aggregation of total reviews and average ratings.
  + Star breakdown updates dynamically as new reviews are submitted.
* **Reviews Table:**
  + Shows reviews left by users after sessions.
  + Supports text wrapping for long reviews.
  + Profile picture + name clickable (opens user profile).
* **Actions (per row):**
  + **Delete:** Removes review permanently (confirmation popup before delete).
  + **Edit:** Opens modal to update review text or rating.
* **Pagination:**
  + Users can navigate across multiple review pages.
  + *Lines per page* dropdown controls how many reviews appear on screen.
* **Error Handling:**
  + If no reviews exist, show empty state (“No reviews yet”).

## **Section 17: Payment Overview**

### **Elements:**

* **Header:** *Payment Overview*.
* **Summary Cards (Top Section):**
  + **Current Balance:**
    - Value displayed (e.g., *$800*).
  + **Withdrawal Eligibility:**
    - Rule 1: If balance ≥ $250 → *“You are eligible to withdraw.”*
    - Rule 2: If balance < $250 → *“You can withdraw once your balance exceeds $250.”*
* **Navigation Tabs:**
  + *Withdrawal request* (active).
  + *Payment Details*.
  + *Withdrawal history*.
* **Withdrawal Details Section:**
  + **Amount to Withdraw**\* (numeric input, required).
  + **Payment Method**\* (dropdown, default: Bank Transfer).
  + **Account Details Preview** (read-only field).  
    - Link: *Update Payment Information*.
  + **Notes (Optional)** (text input).
* **Action Buttons:**
  + **Submit** (green, primary action).
  + **Cancel** (beige, secondary action).

### **Functionality:**

* **Balance Display:**
  + Shows real-time available balance linked to expert’s account.
* **Withdrawal Eligibility:**
  + Eligibility dynamically calculated from balance.
  + If balance is below $250 → Submit button disabled.
* **Tabs Navigation:**
  + *Withdrawal request*: Displays withdrawal request form.
  + *Payment Details*: Displays bank/account details.
  + *Withdrawal history*: Displays past withdrawal requests and statuses.
* **Withdrawal Request Form:**
  + Validates *Amount to Withdraw* (numeric, ≤ available balance).
  + *Payment Method* dropdown supports future payment methods (e.g., PayPal, Stripe).
  + *Update Payment Information* opens Bank Information modal for editing account details.
* **Submit Button:**
  + Enabled only if required fields are valid and eligibility rules are met.
  + On click:  
    - Validates form.
    - Creates withdrawal request entry in database.
    - Deducts pending amount from balance (status: “Processing”).
    - Sends confirmation notification + email.
* **Cancel Button:**
  + Clears form inputs and resets to default state.
* **Error Handling:**
  + If withdrawal exceeds balance → error: *“Insufficient balance.”*
  + If no bank account linked → error: *“Please set up payment details first.”*

Expert Bank Account + Expert Withdrawal Request details here

<https://docs.google.com/document/d/1NyrcR2q7h42h0Bn-YWUL7dI_GA7A9zZKJUsojdFDhyo/edit?usp=sharing>