Project Overview

ProChuzr

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Gam

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**Overview**

*The scope of the project is to develop a secure, fast, and scalable marketplace called ProChuzrforAdvisors and Consumers. This platform basically facilitates matching the consumers with specific Advisors for various needs/guidance/support/consultations. Consumers as the main role holder will sign-up by answering a set of specific questions. The Consumer will be able to view the results as a list of advisor matching the requirements of consumer. The interaction is started by the consumer using various CTA.*

*Advisor will basically be on-boarded as a service provider and need to do signup by answering questions and then creating a whole well built profile.*

*This application will be web-based and can be used anywhere in the world on mobile, laptop, mac or desktop with proper internet connection.*

**App User Types**

There are 3 types of users, who will be able to access this website:

* ***Administrator****: The application will allow administrators to do administration work. Admin can view advisors and consumers on the platform as listing and can also view/edit their profiles.Admin can block/unblock/approve their accounts.*
* ***Consumers****: Consumer can choose the best advisor as per there matching percentage with the advisor, and thenthey can do chat or schedule a meeting with advisor.*
* ***Advisor****: Advisor can create profile by completing the step form,the step form will help consumer and advisor to match their profile. Advisors need to select the service area on map. If they want to server in additional Zip, they will pay monthly charges.*

**Scope/ Work Sheet**

|  |  |  |
| --- | --- | --- |
| **S.No** | **Module/Feature** | **Remarks** |
| **1** | **Project Planning & Documentation** |  |
|  | Scope firm up and delivery plan |  |
|  |  |  |
| **2** | **UI/UX Designing of Application** |  |
|  | Design of Admin Module(Dashboards, profiles, searching etc) |  |
|  | Design of Front Module(Advisor, Consumer) |  |
| **3** | **Admin Module** |  |
| **a)** | **Sign In** |  |
| **b)** | **Dashboard** |  |
|  | Total advisors |  |
|  | Total consumers |  |
|  | Statistics |  |
|  | Total users |  |
|  | Revenue Graph if required |  |
| **c)** | **Advisor** |  |
|  | Can view the list of advisors |  |
|  | Can Block or unblock them |  |
|  | Can filter blocked and unblocked advisor |  |
|  | Can view their profile |  |
|  | Download the reports in excel |  |
|  |  |  |
| **d)** | **Consumer** |  |
|  | Can view the list of Consumer |  |
|  | Can block or unblock them |  |
|  | Can filter blocked and unblocked consumers |  |
|  | Can view their profile |  |
|  | Download the reports in excel |  |
| **e)** | **CMS pages** |  |
| **f)** | **FAQ** |  |
| **g)** | **logout** |  |
|  |  |  |
| **4** | **Advisor** |  |
| **a)** | Step form: |  |
|  | Advisor will answerall the questions of step form to do a sign up. These all questions will also be asked to consumer to get the best advisors listedwith percentage etc. Only the advisors who matches above 70% will be thrown. |  |
|  | In questionnaire step form, Advisor will enter his/her CDN and Firm CDN number to verify the details.  In the last steps, Advisor need to select the AREA OF SERVICE, By default the area of service will be around 10 miles(Can be changed in final product launching) from the address of business. It will basically hold all the Zip codes in that 10 miles(Can be changed in final product launching) radius. To increase the area of service, the advisor can increase the radius on map and each 10 miles radius(Can be changed in final product launching) increase will cost him- 20USDper month (Can be changed in final product launching).  So for example, the advisor selected 40 miles radius, they need to pay 60USD per month to get populated in that specific area/zip code/radius. |  |
|  | Once admin approve the advisor’s account, then advisor will be able to proceed further and use the website. If admin disapprove the account then the advisor’s email will be blocked for the website until admin unblock the advisor’s account.Advisor can register using LinkedIn, Google, Email. we need to send a verification link before adding advisor profiles to the system |  |
|  | PACKAGES |  |
|  | **Lite Free:** The default account for professionals allows them to create their profile, select 5 descriptive components (components within the green section of the survey spreadsheet) for the matching algorithm, the ability to send or receive 3 consumer messages and cover a 5 mile radius surrounding their service zip-code.  **Premium $45/month or $459/year:** Free features, plus 10 more descriptive components, 8 consumer messages and a 15 mile radius of their service zip-code.  **Select $220/month $2,080/year:** Premium features, plus 10 more descriptive components, Unlimited number of consumer messages and a 50 mile radius of their service zip-code.  **Elite *Custom Pricing*:** PC will assess professional needs and price accordingly  **\*Enterprise offerings** will be assessed after launch to determine appropriate price modeling |  |
| **b)** | Dashboard: |  |
|  | Stats: Interactions Happened, Proposal Sent if any, Meetings scheduled etc. |  |
| **c)** | **Service Area/Payments/Packages** |  |
|  | Advisor can also increase the area to get more consumers. They can buy monthly packages. This package is valid for a month after purchasing and will be charged per month if not cancelled. |  |
| **d)** | **Chat Board** |  |
|  | Advisor chat will get activated once a consumer sends a chat request or schedule a meeting request. The consumer will be visible to the Advisor of that interaction. |  |
| **e)** | **Meetings** |  |
|  | Advisor can view all the meetings scheduled by consumers. Advisor cannot schedule a meeting with Consumer till the first interaction doesn’t happen. Advisor can only accept/decline, reschedule the meeting scheduled by Consumer. |  |
| **f)** | **Profile** |  |
|  | Advisor can add/edit the data for all the answers answered while filling up the initial signup. |  |
|  | Advisor will receive auto-generated password on his/her mentioned email. |  |
|  | Password: Advisor can also change/ reset password |  |
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| **g)** | **Mails** |  |
|  | Mails for signup/Email Verification/Password setup |  |
|  | Meeting scheduled/rescheduled Mail |  |
|  | Chat requested Mail |  |
|  | Package purchases mail |  |
|  | Renewal charges Mail |  |
|  |  |  |
| **h)** | **Logout** |  |
|  |  |  |
| **5** | **Consumers** |  |
| **a)** | Step Form: |  |
|  | Consumer will answer all questions of step form to do a sign up. This will throw a list of matching advisors and the interaction begins. Consumer will have filters basically on results page. **Client need to send the exact Filter list.** |  |
|  | Consumer will add his/her email and other details then they will receive a welcome email with auto-generated password.They can login with Google, Facebook and Email.we need to send a verification link before adding consumer/advisor profiles to the system |  |
| **b)** | Dashboard: |  |
|  | List of all matched advisors matched to the last query.  **Interactions with Advisor**: Schedule Meeting, Send Message, Interested/Not Interested  **View:** Matching criteria, Not Matching Criteria, Percentage of Match, Basic profile Details, Rating If we need to consider |  |
| **c)** | **Old Matches** |  |
|  | Holds all the matches according to the options selected by the consumer. The consumer can name the match. |  |
|  | Find new match- This lets the consumer to fill up the matching form again and see the results. Can save the match process by naming it. ie- searching for insurance advisor |  |
| **d)** | **Chat Board** |  |
|  | Chat Board: Consumer can choose multiple advisors to do chat with them. Can view the old chats and new chats. |  |
|  |  |  |
| **e)** | **Meetings** |  |
|  | Consumers can also schedule a meeting with advisor. They can also cancel/reschedule.  Can check all the meetings scheduled. |  |
| **f)** | **Profile** |  |
|  | Consumer can basically edit/view thee basic profile details. |  |
| **g)** | **Logout** |  |
| **h)** | **Mails** |  |
|  | Account Signup Mail |  |
|  | Meeting scheduled/Accept/Decline Mail |  |
|  | Password Reset Mail |  |
|  |  |  |
|  |  |  |
| 6 | **Website/Frontend Setup** |  |
|  | Front-end pages |  |
|  | Homepage |  |
|  | About Us |  |
|  | Services |  |
|  | For Consumers |  |
|  | For Advisors |  |
|  | Contact Us |  |
|  | FAQ |  |
| **7** | **End to End Testing** |  |
|  | End to End Testing |  |
|  | System Integration & Regression Testing |  |
|  |  |  |
| **8** | **Launch on live Server & Closure** |  |
|  |  |  |
|  | Total Estimated Hours Required |  |

**Technology Recommendation:**

### **Development Framework**

* **Proposed Technology:**LAMP
* **Server-Side Scripting**: Laravel with Vue.js or Livewire
* **Client-Side Scripting:** JavaScript
* **Database**: My-SQL
* **Programming Style:** MVC Platform
* **Client Front End:** HTML
* **Server**: Linux
* **Security**: SSL, Data encryption

### **Third Party Integration**

* Email server
* Message library
* Stripe
* Calendly
* Google Map
* Agent verification services

1. **Some More Points:**

* All the carrier API / or any third party API will be provided by the client
* All text matter will be provided only by you.
* After completing the project, we will provide you all the source code, text/content, graphics files & other related files.
* During the whole development we need assistance from your side.
* You will have all the copyrights & permissions of the site.
* If any kind of image/script/API or any other thing, which is required to be used in the site & involves additional payment to purchase it, we'll intimate you about it. Such payments are needed to be borne by the client & provide us with such image/script/API etc. Our quote will be exclusive of licensing cost of any third party application and hosting
* We have taken documents **“sent by you”** as reference while preparing the specifications' doc & have listed all what we understood & found there. Yet, it is quite possible that we might not have noted some features in the reference site/document. Our quote is specifically based on the features listed in the specifications doc. Therefore, any other feature, which is not listed by us in the specifications doc, will not be considered as part of the quote & hence, will be quoted separately when we are intimated about any such thing later.
* Our quote is specifically for Website/Database development work & hence hosting, data entry etc. or any other such things are not included. Such services will be quoted & charged separately, if & when required.
* Quote may vary according to scope alteration