# **SERVICES OFFERED FOR A SERVICE PROVIDER (SP, for short): FREELANCER/PROFESSOR**

## Navigation

The navigation needs to work with the last 2 releases of the main navigators: Explorer, Edge, Mozilla, Firefox, Chrome.

The navigation needs to work with Android e IOS mobile phone with responsible experience with the last two releases.

## Information to watch by Service Providers (SPs) before registration:

The service provider should watch the following information before registration:

1. Jobs submitted from customers (Cs) in the platform. The SPs and Cs can watch the customer jobs submitted but the SP can’t answer a job before registering. When the SP tries to answer a C job he is requested to register in order to answer the job.
2. Services offered by other SPs. The SPs and Cs can watch the service offered by other SPs registered in the platform. When the SP wants to submit a service offered by him/her, he is requested to register. When C try to request a service offered by a C needs to register before.

## SP Registration

In the user registration we will have a radio buttom with 2 options: C or SP, to distinguish if the C or SP is going to be registered.

The user needs to select one of them (C or SP) to continue the registration process.

The process for registration is the following, like it is implemented in wordpress:

1. The SP enters its name, email adress, password and selected username in the duda platform. The username needs to be unique in the duda platform.
2. The SP must accept the data management optins and sign the contract. The SP needs a link to the contract to see it before registering.
3. The SP receive one mail in his/her mail and needs to click in the mail link.
4. With the link the SP is redirected to the platform to complete the registration process.

The fields for SP registration are the followings:

1. Mandatory fields:

* Areas of expertise, where the SP can do jobs or offers services.
* Price per hour of SP service.
* Fiscal identification number: DNI for persons and NIE for companies in Spain.
* Date of birth. It is not allowed to register one SP or C below 18 year old.
* Bank account, in order to do the payment to them from the platform. Only mandatory if the SP wants to receive the payment through the duda platform.

1. Optional fields:

* Calendar of availability. It is adviced to enter the calendar to adjust the jobs to the SP availability.
* Vídeo presentation in the format of streaming: youtube or vimeo…
* Documentation with examples of jobs done before.
* Link to SPs social network: LinkedIn, twitter, facebook.

Once the SP profile is defined the SP will have access the following optins in its dashboard:

* Access to buy prepaid session packages.
* Access to C jobs (not expired yet) in his/her area of expertise to answer them if he/she wants.
* To be able to submit his/her portfolio of service offered by him/her in the duda platform.
* His/her wallet (session credit available and money earnt in the platform from Cs).
* Rest of options in the dashboard: disputes…offered by default.

NOTE 1: The SPs registration needs to be done in Amelia too, because the platform will use the Amelia plugin for SP booking management, so we should request all the mandatory fields that needs Amelia to work. The registration needs to done only once in the duda platform, so we don’t want to be registered once in duda and other in Amelia or BBB. The SP and C registration is once in the duda platform and all the plugin that duda uses.

NOTE 1: Out of scope in phase 1: In the first phase, we are not allow to register an SP with his/her account in facebook or google.

NOTE 2: The SP is not allowed to use a hotmail account.

## SP login in duda platform:

The SP can login in duda plataform with mail or username + password. He can select if entering the username or mail as identifier to access duda platform. The necessity of the username is because the SPs and Cs should have the availability to change its mail if the SP or Cs wants and continue on using the platform with its username.

## First demo free to SP if requested:

The SP can request by the platform a demo in order to understand how the duda platform works.

The SP’s request for a demo will be delivered to a special SP, that will be, the duda platform operator. The duda resuelta operator will send the calendar to the SP to agree the date/time for the demo.

This process is like a job submit by SP, where the SP requests a demo (this will be the job), the job is delivered to a special SP for answer (this special SP will be the duda platform operators), that send its calendar to SP to agree the time of the demo. When agreed the time of the demo, a platform operator will send the link for the session. The link for this special session will have no cost. To implement this in the same way that a job process, the operator can have a lot of session credits in its special SP balance configured by the platform admin.

## Out of scope: SP Identity verification and C verification: we are not going to implement his step. We are not going to request the identity card photo to the SP, only the identification number for invoicing.

## Purchase a prepaid package to use the virtual rooms.

After registering the SP will be able to purchase session packages. We will have at least the following packages available to buy it by SP:

* Package of 5 sessions for 5 Euros.
* Package of 10 sessions for 10 Euros.
* Package of 20 sessions and the possibility of create SPs (for corporations): 20 Euros.
* Package of 50 sessions and the possibility of create SPs (for corporations): 50 Euros.
* Package of higher visibility in the web + 10 sessions: 80 Euros per month.
* We need to analyse a subscription package of visibility + 10 session per weeks for X Euros a month.

The SP package purchase will be done using Stripe in the duda platform or the SP can buy a package using its balance of services in the platform. In the case of using Stripe, the payment can be done with cards (debit/credit) and paypal. In the case of using its service balance for the purchase, the SP service balance needs to be higher the price of the package to be purchased.

After purchasing the package, the SP will receive a mail with the invoice from duda platform and the SP session credit balance will increase in the amount of session credit corresponding to the package purchased. This session credit will be available to be used to send session link by SP immediately after the purchase confirmation.

## SP to submit a service:

After registering the SP can submit the service/s that he/she offers.

The SP will define the services offered by him/her to the Cs. To offer a service the SP needs to enter the following fields:

* Service description where the SP define the service to be offered. For instance, math classes, financial consulting…
* Area of expertise of the service offered. For instance, academic for classes, financial for financial consulting…
* Minimum price per hour for this service.
* Calendar of availability for this service.

The service offered by SPs will be published by the duda platform and they will be accessible through navigation to all users that access to the duda platform web.

The service offered by SPs will only be able to be hired by a C registered in duda platform.

NOTE: When registering, the C could be both, C and SP, but the SP couldn’t be a C.

## SP to be searched and chosen for a job by a C.

The SPs registered will be able to be searched by the users that access to duda platform web, even without being registered.

Filtering criteria for SP searching: The C(s) mandatory fields for SP filtering, will be the SPs area of expertise and the maximum price that will be the minimum price set by the SP in his/her profile the platform. It is optional that the C(s) adds his/her calendar availabity to the SP filtering criteria. If the C enters his/her calendar availability as SP rearching criteria, the C avalability entered by C will be checked against the SP availabity defined by the SP when offered the service in duda platform.

The SP has the option to put visible or not its calendar to Cs. Either the SP calendar visible or not visible for Cs, the platform will use in the filtering criteria the SP calendar availabity if C enters this filtering criteria to match with the job data requirements.

## SP to receive C jobs notification.

* When C submit a job in duda platform he/she can do the following:
  + Select only the SPs that will receive the job submission for answer it. In this case, only the SPs selected by C will receive the job notification to answer it.
  + Not select the SPs, and the job will be sent to all the SPs in the platform that meet the filtering criteria: area of expertise, maximum job price below SP price, SP calendar availability. If SP doesn’t define its calendar availability, this data will not be used for the search, and the job notification will be sent to those SP that have the same area of expertise and the SP price below the job price. Otherwise, the jobs will be sent to the SP that meets all the criteria (area of expertise, price, availability).

The SPs that meets the criteria chosen by C, will receive a notification by mail and in the platform to answer the job with a proposal.

The SP will need to access the duda platform to answer a C job notification.

## SP to answer a C job:

Only the SPs that meets the job filtering criteria will receive a notification to answer the job.

All the SP in the platform in the same area of expertise will be able to watch all the jobs requested, but only being able to answer those SPs that meet the filtering criteria for the job. If a SP wants to answer a job that doesn’t match this profile (for instance, the SP price is above the job price), the SP will be required to modify his/her profile (SP price) to be able to answer this job.

The SP through the duda platform chat will contact with the C that requested the job to define the service conditions. Only 3 chat communications a day in each direction will be allowed in the duda platform chat between a certain C and a certain SP before a session booking will be needed.

The SP will send its calendar to C to book a session meeting and when C select the time/date for the meeting in the SP calendar a session link will be generated automatically from SP and send by mail to C, only if SP has go tcredit session available or service balance amount available to pay a session.

If SP hasn’t got session credit or money enough in its service balance to generate the session link, the SP will be offered to buy a prepaid session package to send the link session to C and continue on talking with him.

The communications between the SP and C will be done by the session link and the following communication will be done by the session links.

## Job/Service life-cycle management:

When C accepts a SP proposal, the C will change the job status to started and this will trigger a notification to all other SPs that offered this service for this job and were not accepted.

When SP finished a job/service, the SP needs to change the job/service to finished and at this moment the following notifications need to be send to the C: a notification to score the SP service and a notification to accept the SP service. The two duda platform notifications can be both in the same notification to C. The scoring is optional for the C to do, but not the SP service acceptation that will be mandatory for C to accept or deny it.

The C can accept the service ending and the payment is delivered to the SP service balance to be paid at the starting of the new month from duda platform or can’t accept the SP service and in this case this service needs to be put in dispute.

## SP to generate a session link:

At any moment, SP will be able to generate a session link to be sent to C(s). The SP only needs to have session credit available or service balance with money enough to by the session price.

After sending the link the SP balance (credit or sessions) will be discounted according to the payment method priority order. In the case the SP has got credit sessions available, the SP will be discounted firstly from sessions credit, otherwise the SP will be discounted 1,5 Euros from his service balance coming from C payments. It is not possible to discount one part of a session price from the credit balance and other part from the service balance. The whole session will be discounted from only one balance.

Each time the SP send a link session to C, will be discounted one session. If the SP send the same link session to several different Cs, the duda platform will charge one credit session/price for its C where the link is sent.

## SP and C use of virtual room

Once C and SP agreed the calendar and the session link is sent from C, when the start session time arrives, the session will begin between SP and C(s).

The maximum time for a session will be 90 minutes, after then the session will be cut by duda platform. Of course, the both part SP and C, will see the time pending to cut the session in the duda platform.

After the session finished, if the both parts C and SP wants to continue the session the SP needs to send a new session link to C.

The virtual room needs to have operative, at least the same features of other platform like Skype or google meet (recording, options to manage the session…) plus the interactive whiteboard where the C and SP can write in the whiteboard and watch for the two at the same time, or can share a document and write on it the two and watch the modifications for both of them.

## Session cancelation by SP

The SP will have the option in its dashboard to cancel a session already sent to C. The session link will be able to be cancelled at any moment before the session begins. After a session begins it is not possible to cancel a link session.

When the SP cancels a session, the link will be unuseful and duda platform will return one credit session for each C where the SP sent the session link cancelled. So, duda will return the session credits discounted when the link was sent and the SP credit session balance will increase in the sessions credit returned because of the cancellation in order to be used for other services.

## Virtual Room payments

It is explained in the payment document. See the payment document.

## Receive the service payment from the customer through the platform and check it in the dasboard.

It is explained in the payment document. See the payment document.

A C can pay the SP services through Stripe in duda platform by using a debit/credit card or paypal. The C payment will be done to duda platform and duda platform will pay the SP each month by transference to the SP bank account set in the SP profile by the SP.

When a C pays to a SP service, the SP whose service was paid will receive a notification by mail and by the duda platform and the SP service balance in duda platform will increase in the amount of serviced paid by C minus the payment fee in duda platform.

The payment fee in duda platform will be the fee of Stripe + 1% of the amount paid by C to SP. This payment fee will be configurable.

The SP can query its service balance in his wallet in his/her dashboard.

NOTE: The SP can choose if receiving the payment using the duda platform payment feature or not. In the case of not, the payment will be done between the SP and the C out of the platform. The SP can decide too, to do the service to the C, before the C service payment in the duda platform or doing for free, but in all the cases, the duda platform will discount a session when the session link is sent from SP to one C.

## Rating the SP service by C and rating the duda platform by SP.

The C will be offered to rate the SP service when SP updates a service as finished in the duda platform. The SP rating will consist of a number of starts (between 1 and 5) and an optional comment from C that can be answered by the SP. The SPs rating and comments will be visible for all the users connecting to the platform.

When the session finished the SP will be offered to rate the duda platform. The duda platform rating will be visible only for the duda administrator in the first launch, after the first launch and analysis of the results, the duda administration can decide to share this scoring and the comments with the users that connect to the platform.

## SP Management options:

The SP will have access to the default options offered by the platform to manage its profile, service, payments, disputes…and besides SP will have available the options to manage its calendar and booking that is within Amelia plugin…

Some of the features required are in the SP dashboard are the following:

* Managing its professional profile (date modification…).
* To submit a service or to delete a service offered before.
* To define its calendar of availability.
* Managing its jobs: jobs finished, job in development…
* Managing its wallet: balance of session and balance of services.
* Managing their payments: they can buy session using stripe or using its service balance.
* Disputes and other options offered by default.
* …

# **SERVICES OFFERED TO CORPORATE SERVICE PROVIDER: ACADEMY/LAW FIRM/CONSULTING GROUP/OTHER SERVICE FIRM**

We are not going to have special corporate SPs. We are going to have package services for corporate SP. Those SPs that buy one of these corporate packages will be able to use the features designed by Corporate and offered in these packages.

The corporate packages will offer the following features:

## Creating employees that belongs to the corporation.

The corporation administrator (SP administrator) will be the SP that buys the corporation package and after the purchase the SP will have the permission required in the platform to create new employees that belongs to its company.

The SP administrator, those that purchased a corporate package, can create the employee profiles (name, areas of expertise…) belonging to their company. After SPs creation of employees, the SP employees can work in the duda platform as usual. The SP administrator will be the unique allowed to buy a session package or to receive the payment of earnings of all its employees.

The session purchases by the SP administrator can be used for all the employees belonging to SP company. All the sessions purchase will be used by all the employees within the company to send link to Cs to do one service.

The SP employees can’t purchase session packages, only the SP administrator. The SP administrator is not an employee of the corporation. If the SP administrator wants to be an employee too, the SP administrator will have to define a new employee for himself.

When the total sessions purchased by SP administrator has spent, the SP administrator will be noticed to buy new sessions to be used by all the employees.

The SP administrator will have a unique balance with all the earning of all employees belonging to its company. The employees will have an earning balance for each of them with the service done for each of them that only will be visible by SP administrator. The SP administrator can decide if the employees service balances are shared with an employee or not.

The duda platform will done a single payment for all the employees services done to the SP administrator account. This is the monthly payment by transference that will do duda company.

The SP administrator can buy prepaid session packages with its service balance or with stripe. If the SP administrator buys the prepaid session package with the employee service balances, the SP administrator can use the total service balances of all the employees, because the total service balance belongs to the SP administrator.

NOTE: Duda platform will have only 2 levels of deep in the first duda platform launch that will be: the SP administrator that represents the corporation and the employees created by the SP administrator. We are not going to create sublevel of SP companies in the platform at least for the first duda platform launch.

## Management options for corporations:

These options will be only available for the SP administrator.

* Reporting of service done by each employee and money amount earnt by each employee belonging to the SP organization.
* Reporting of service done and money amount earnt by all the employees.
* Reporting of number of sessions spent by each employee.
* Reporting credit session pending to spent for all the employees belonging to the corporation and the credit session pending.
* Reporting of the ratings of its employees by the customers.

# **SERVICES OFFERED TO CUSTOMERS (PEOPLE THAT WANTS TO HIRE A SERVICE)**

## Searching for a professional to do a job according to the filters defined.

The filters will be: area of expertise, maximum price, calendar availability, number of starts.

In the case of selecting only one criteria, the mandatory one will be area of expertise.

It is optional for the SP to put his/her calendar visible for the Cs. In any case if SP define his availability calendar in duda platform it will take into account in the filter criteria to show the SPs available in the times that the C needs the job.

In the case the SP doesn’t have defined the maximum price and/or calendar availability, but it is within the area of expertise written by the C for the SP rearching, they will be shown in the searching.

The C can search customer too for number of starts or include it in the search criteria. The SP numbers of starts is defined by the C rating after finishing the SP service like was commented before herein.

All the C rating comments will be visible for the Cs that are trying to find an SP to do its job.

## C registration in duda platform

# In the user registration we will have a radio buttom with 2 options: C or SP. The user needs to select one of them to continue the registration process.

The C is a different duda platform user than SP, and so, it will have a different data required.

The C, like SP, will have only a process to register in duda platform and in all the plugins used by duda platform like Amelia, BBB…Thus, the C only provides its data and do the registration process once, not in any plugins in the platform.

When a C wants to submit a job in the duda platform or select a service from SP services portfolio for requesting a proposal will need to be registered in duda platform.

The process for C registration will be similar in the steps needed than the process of SP registration:

- First the C will enter its name, mail, password and the selected username in the platform (the username needs to be unique in the platform for him) and gives the OK to the data optins and the contract. The C contract needs to be visible for C before a gives the OK to the contract.

- The C will receive a mail in its inbox to complete the registration process and the C needs to click in the link to complete the first registration process.

- The C needs to define after the registration the following mandatory data in his/her profile:

* Fiscal identification number: DNI for persons and NIE for companies in Spain.
* Date of birth. It is not allowed to register the SP or C below 18 year old.

## C login in duda platform

The C can access duda platform with the mail/username and the password defined in the registering process.

## C to submit a job in duda platform:

After C login, the C can submit a job in duda platform, in order to do this the C will need to enter the following fields in job submission:

The job mandatory fields are the following:

* Job title. It will be a summary of the job description in order to understand the job request quicky without necessity to read the description.
* Job description: a free text field to enter the job description limited by a X number of characters (we need to define X)
* Job area of expertise, it is the SP area the expertise the C is looking for this job. For instance, lawyer, academic…
* Job date expiration. The last date where the SP can send proposals for a job. One a job is expired the job is not valid anymore in the platform. Before expiring a job without SP proposals, C will receive a notice to extend the job date expiration if he wants. The job expired can’t be answered anymore.
* Priority: we are going to have 4 priorities: very high, high, normal, low. The meaning is very high (12 hours for responding), high (24 hours for responding), normal (48 hours of responding), low (more than 48 hours of responding).
* Maximum price to pay for the job.

The job optional fields are the following:

* Selecting the SPs to send the job.
* Not select the SPs to send the job and the job will be send to all the SP that matches the job criteria.
* Calendar availability, where the C is available for the sessions.

In the case, the optional fields are filled in by the C, these fields will be taken into account in the filtering criteria to send the job notification only to the SPs that meet these filtering criteria.

After a job is submit the SPs that meet the filtering criteria will receive a mail notification and a platform notification, in order they can enter in the job and send a proposal to the C.

## C to receive SPs job proposals

The C will receive the SPs contacts that are interested in the job implementation through the duda platform.

The C can accept the communication to the SPs that the C wants to talk. When C accepts a communication to an SP that answered with interest to do this job, the SP is noticed by the duda platform chat and they can chat in duda platform trought duda platform chat. The number of communications (chat messages) in the platform before the obligation for the SP to send a session link to C will be 3 communications in each of the two direction (C->SP, SP->C). The maximum number of communication between one C and one SP determinated is 3 per day.

The SP will send the calendar to C through the duda platform. The SP can define his availabity calendar in duda platform (it is done in Amelia plugin). The visibility of the calendar is optional for the SP to share with Cs.

The C will select in the SP availability calendar the date of session meeting in the duda platform to extend the job information, or to do the job, for an interactive communication in the interactive room using the interactive tools of the BBB and the whiteboard.

When C selects a date in the SP availabilty calendar, the duda platform will send a session link to C on behalf of the SP if the SP has either session credit availble or amount enough in the session balance according to the specification made in the payment document.

If SP has not got neither session credits nor service balance in the duda platform, duda platform will send a notification to the SP, in order to the SP can buy credit session selecting one of the prepaid session package available. This issue will happen the first time the SP gets a C booking if the SP will not buy a prepaid session package, that will be te typical case. To fix this issue the SP can buy a reduce package session of 5 session, that was defined in the package section.

## C to pay a SP service

The duda platform offered a feature to the C to pay the SP services.

The C will pay the SP services to duda platform. When C pays a SP service by using duda platform the SP service balance will increase in the amount paid by C minus the payment commission, that will be the Stripe commission plus 1%.

The C will pay the SP through the Stripe, by cards and paypal.

Every month the duda platform will pay the SPs for the SP services earning by doing a transference to the SP bank account. The duda platorm will maintain a minimum service balance of 5 Euros after the SP payment every month in order the SP can send session links to C without the necessity to purchase new prepaid packages every month after the duda platform payment to them.

When C paid a service to a SP, SP will receive a notification by mail and in the platform in order the SP can check its new balance in the duda platform.

The C will receive and invoice from duda platform for the SP service payment in the C mail inbox. The C invoice will be done from duda platform that receives the payment for the SP service to the C that is the one that pays the service. This invoice doesn’t need to include the IVA taxes because the C and the duda platform company are in different European countries. The C invoices will be stored in duda platform and can be queried by the Cs in its dashboard.

## SP invoicing

Each month the duda platform will pay the SP service earning that are in the SP service balances, and to do it, the SP needs to send an invoice to duda platform for these service payments. To avoid that the SP needs to send an invoice to duda platform, the duda platform will generate the invoice form him and store it in the SP dashboard for SP querying and for auditory proposals.

Due to the SP is in a different country than duda platform in Europe. The SP doesn’t need to do an invoice with IVA taxes and the same with the invoice of duda platform to the customer.

## C management dashboard:

* The C will have a access to the default options defined in the platform to manage its jobs, profile, payments, disputes…