Project ProPandas

Only Robin, Deepak and Daniel can edit this.

Website will be in two languages (German and English)

Module 1: Post a Job (this also includes customer registration)

Please use the workflow of https://www.upcounsel.com/jobs/new

Categories within Post A Job:

There is a list of categories, which we are included below:

STEP 1: What type of legal assistance do you need?

==[we need flexibility to create a this options tree from the administrative login]==
- Business
    - Other
    - Business Formation and Structure
        - Form a New Business
        - Change or Restructure an Existing Business
- Intellectual Property
- Employment
- Contracts & Agreements
    - Create a Contract
    - Terminate an Existing Contract
    - Resolve a Dispute or Breach of Contract
    - Something Else
- Immigration
- Real Estate
- Tax
- Lawsuits & Disputes
- Other

STEP 2:

Which of the following best describes the type of legal assistance that you need?

- Single Consultation
- Ongoing Assistance

STEP 3:

What would be your preferred billing mode from the following?

Please note these are the best estimates for the project based on your current description, the actual cost will be agreed between you and the lawyer based on a detailed discussion.

- Flat fee
- Hourly Rate
- Both

STEP 4:

What will you need a ProPandas lawyer to do?

Please describe your legal needs in a few sentences. Try to include as many details as possible, as this will help us identify the best lawyers for your job.

A good description includes:

- Unique details about your project or legal needs
- Project timeline and expected deliverables
- Your budget expectations
- Specific legal expertise or background that you need

HERE: Option to Upload documents (e.g. up to 15 MB)

STEP 5:

What is the name of your company?

[Company name]

Or

I am acting as a private person.

STEP 6:

Would you like to receive text (SMS) notifications when lawyers send you proposals?
- Yes
- No

STEP 7:

Where are you located?
- Country
- Zip Code

STEP 8:

Create an account
- Register with Google
- First Name, Last Name, E-mail

Module 3: Free Legal Documents

Refer: https://www.upcounsel.com/free-legal-documents

Categories:
- Business
- Intellectual Property
- Employment
- Contracts & Agreements
- Immigration
- Real Estate
- Tax
- Lawsuits & Disputes
- Other

Please design a custom image for all these above categories

Also there is a search functionality to allow search on words with-in these uploaded documents.

User can download the documents. Only the company (ProPandas) can upload documents from the backend.

An option for user to email us a document if he/she would like to get it uploaded.

Module 4: sitemap

Please refer https://www.upcounsel.com/sitemap

Link to all pages are provided here to help in SEO

Module 5: Search a Lawyer

Type of Lawyers:

- Business Lawyers
- Intellectual Property Lawyers
- Employment Lawyers
- Contracts & Agreements Lawyers
- Immigration Lawyers
- Real Estate Lawyers
- Tax Lawyers
- Lawsuits & Disputes Lawyers

Countries:

- Germany
- Austria

Popular Cities:

Germany

- Berlin
- Munich
- Duesseldorf
- Koeln
- Hamburg

- Hannover
- Stuttgart
- Frankfurt

Austria:

- Vienna
- Graz
- Salzburg
- Klagenfurt
- Innsbruck

Module 6: Testimonials

Refer: https://www.upcounsel.com/customers

Client Name: Funtoosh LLP

"The lawyer did a great job in helping me starting my business! Well done!"

There would be a grid of 3 columns and unlimited rows to show testimonials, just like the upcounsel. There is no "read more" to these references.

Module 7: Lawyer Sign-Up

Refer: https://www.upcounsel.com/account/register#attorney

·   Sign up as a lawyer
- o Academic Degree (fill-in)*
  - Dr.
  - Mag.
  - LL.M.
  - (blank)

- o First Name (fill-in)*
- o Last Name (fill-in)*
- o Email (fill-in)*
- o Phone Number (fill-in)*
- o Law firm (fill-in)* [Please put your own name if not a law firm]
- o Law firm address (fill-in)* [Please put your residential address if you don't have an office address]
- o City (fill-in)*
- o ZIP Code (fill-in)*
- o Country (drop-down – Austria and Germany)*
- o Upload Resume*
    - § Upload Resume (BUTTON)

· I am not a robot – re-CAPTCHA

· SIGN UP NOW (BUTTON)
    - o Text: By clicking on "Sign Up Now", I agree to and understand the ProPandas Terms of Use (LINK) & Privacy Policy (LINK).

[PROFILE PAGE]

After Sign Up> Complete your profile (Show Percentage Complete):

- Headline [30 characters]
- About yourself: [free flowing text with minimum 500 characters, maximum 5000 characters]
- Upload your picture
- Upload your bar association certificate (to get a seal of verification)
- Law Schools Attended (Add all your schools separated by commas)
- Upload the address proof
- Upload identity proof

Please select the category you would like to provide services for [Select Many]:

- Business
- Intellectual Property
- Employment
- Contracts & Agreements
- Immigration
- Real Estate
- Tax

- Lawsuits & Disputes
- Other [Option can be filled by Lawyer in free text format]

What is your hourly rate for a legal project? (Note: You are free to change it anytime)

[Fill-in box with numbers] Only acceptable numbers between 20 and 500?

What kind of projects/clients would you like to work for?
- Single Consultation
- Ongoing Assistance

On which law can you advice?
- Germany
- Austria

What languages do you speak?
- A standard dropdown menu to select one or many languages

Please add a bank account to receive payments:

NEW BANK INFORMATION
- First Name (Fill-in)
- Last Name (Fill-in)
- BIC (Fill-in)
- IBAN (Fill-in)

    - Text: Your information is secure. Learn more (LINK)
    - Text: By using our service, you agree to pay all ProPandas lawyers through the ProPandas platform, including subsequent projects and transactions not related to the initial project. This policy protects both clients and lawyers and allows ProPandas to guarantee the quality of legal work if disputes arise.
- I agree to these terms (CHECK BOX)
- Cancel (BUTTON)
- Add Account (BUTTON)

Already have an account?

        o LOGIN NOW (LINK to Log-in)

Module 8: Lawyer Dashboard

Please open this link only if you are logged-in as a lawyer

Credentials:

d.schwarzl@lumsden.at

giufranco89

Refer: https://www.upcounsel.com/dashboard

[Daniel - we need to discuss this, I think we really need to simplify the client dashboard and the Lawyer Dashboard for the first version to keep it to the minimum]

[Daniel - also do we have a chat facility between lawyers and clients] UpCounsel now has the option to "Send Messages" - are you thinking of something else?

- Dashboard
  - What would you like to do? (Drop-Down)
    - Create Client
      - Here the lawyer can set up a new client and fills in the basic details, first name, second name and email, and sends a request to the client to come to website and create his own login
    - Start a Project
      - Create a new project, as per the "Post a Job" link above, and send the link of the project to the client to fill/edit additional details
    - Track Time
      - Lawyer could bill two clients for the exact same timeslot
      - Here the lawyer will see a list of all his projects. With the column as checkbox, the second column as project ID, the third column project name, fourth column as the client name, fifth column that says "Add a time".
      - Lawyer can also select multiple projects at the same time, and there is an option to "Add a time" on multiple projects at the bottom of the list of projects

- When the lawyer clicks "Add a time", he sees a page that has the project detail on the top and then a list of 10 rows with several columns, the first colum is for date, which is mandatory, second column start time, third column end time, fourth column time in minutes, fifth column description
- At the end of 10 rows, lawyer sees a button to "Add a row", "Add 10 Rows", or "Submit"
- In case of multiple projects selected by the lawyer, the lawyer will see a page with all the projects one by one, separated by 10 rows each.
- Bill a Client
    - Here the lawyer will see a list of all his projects. With the column as checkbox, the second column as project ID, the third column project name, fourth column as the client name, fifth column that says create an invoice.
    - Lawyer can also select multiple projects at the same time, and there is an option to create an invoice on multiple projects at the bottom of the list of projects
    - Once the lawyer clicks create an invoice, lawyer can select one or many hours/time slots, he has "tracked" on the project to bill
    - There is final confirmation and once confirmed invoice is sent to the client for payment
- Submit a Quote
    - Lawyer sees all the projects in a table format, first column project ID, project name, client name, location, project type, billing type, number of proposals submitted
    - lawyer can filter the projects by client name, location, type of project, location etc.
    - Lawyer can select one project at one time
    - Once the lawyer selects a project, a new page opens, lawyer can fill his description, comments, and also put a billing fixed fees or an hourly rate
    - There is a wall for a project (like a what's app), which gets opened once you click the "message icon" on a project, one could post an attachment to the wall
    - Lawyer can revise the quote, however all the quotes are stored in chronological order, until one quote is finally agreed between the client and the lawyer
    - Once a quote is submitted, a message "a new quote was recently received" is visible to the client in his/her

dashboard (more details to be included in the client dashboard)
- Lawyer can also tag certain jobs as shortlisted or bookmarked
- My Projects (Table with six tabs)
  - In Progress
  - Proposal Submitted
  - Bookmarked
  - Jobs Completed
- Jobs Posted
  - Jobs I Posted
- Invoices
  - Showing (Drop-down; linked to table below)
    - All
    - Sent/Viewed
    - Processing
    - Paid
    - Deleted
  - Create Invoice (BUTTON)
- Income Report
  - Filters for Table below
    - By Client (drop-down)
      - All
      - Client 1, Client 2, ... (Names of my clients)
    - By Payment Type (drop-down)
      - All
      - Job Invoice
      - Direct Invoice
      - Refund
      - Adjustment
    - Starting Paid Date (fill-in; Format DD/MM/YYYY)
    - Ending Paid Date (fill-in; Format DD/MM/YYYY)
    - Apply Filters (BUTTON)
  - Table with 8 columns
    - Related to
    - Client
    - Payment Type
    - Paid Date
    - Service Fees
    - Expenses & Filing Fees
    - Transfer Amount
    - Income

- ○ Export CSV (BUTTON)
- ○ Total Transfer Amount (calculated in Euros)
- ○ Total Income (Calculated in Euros)
- ● System Messages

Module 9: Lawyer's Account Settings

https://www.upcounsel.com/account/edit

Please allow to edit all the settings as per [PROFILE PAGE] [Module 7]

In addition to the PROFILE PAGE, Please allow following:

- o Connect your Accounts
  - § LinkedIn
    - · Connect to LinkedIn (BUTTON)
- o Customize your Profile URL
  - § Text: Note: One a URL is set, it cannot be changed.
  - § Profile URL (fill-in)
  - § Save (BUTTON)
- o Be referred by clients or attorneys
  - § Text: Give this URL to your clients or other attorney so that they can create a referral link to share with their network.
  - § Referral link
    - · Copy link -> this opens the view profile page

- · Change Password
  - o Text: Use the form below to change your password. New passwords are required to be a minimum of 8 characters in length.
    - § Current Password (fill-in)
    - § New Password (fill-in)
    - § Re-enter Password (fill-in)
    - § Save Password (BUTTON)

- · · SMS Notifications
  - o Text: Verify your phone number to receive SMS notifications.
  - o Add your phone number (fill-in)
  - o Send Verification (BUTTON)
  - o Notification preferences
    - § Call reminders (CHECK BOX)

- · Text: Receive a text notification 30 minutes prior to a scheduled call.

- · · Proposal Templates
  - o Template Name (LIST)
    - § Name of template (if you click on it POP-UP with information to template)
    - § Edit – Delete (BUTTONS)
  - o Add New (BUTTON)

- · Manage Availability
  - o Text: Please let us know if you are available or not available to take on new clients. Correctly reflecting your availability on this page will allow us to tailor your ProPandas experience accordingly – learn more by reading below.
  - o Available for New Clients (YES/NO)

  - o Text: Available for New Clients: By using our service, you agree to pay all ProPandas lawyers through the ProPandas platform, including subsequent projects and transactions not related to the initial project. This policy protects both clients and lawyers and allows ProPandas to guarantee the quality of legal work if disputes arise.

  - o Text: Not available for New Clients: By using our service, you agree to pay all ProPandas lawyers through the ProPandas platform, including subsequent projects and transactions not related to the initial project. This policy protects both clients and lawyers and allows ProPandas to guarantee the quality of legal work if disputes arise.

  - o Text: Please note that any changes to your availability will take effect within 1 business day. For more information on managing your availability, click here. (LINK to page full of text)

- · Calendar Management [option to connect to your google calendar, will discuss with the tech team on its viability and usability]
  - o Text: Connect your calendar so that clients can easily schedule calls with you. Neither ProPandas nor clients will see the information on your calendar – only the blocks of time you are available. Learn More (LINK to page full of text)
  - o Connect Your Calendar (BUTTON)

Add links to the profile page on the following platforms:

- o Facebook
- o Twitter
- o Linkedin
- o Xing
- o Google Plus

Module 10: Lawyer's View Profile

https://www.upcounsel.com/attorney/profile/5cd8c8967c55e401f3992d47

· Overview
- o Photo
- o Name
    - § Headline (Headline (e.g. Attorney at Law), Location, Licensed in XY and Law School appear below the NAME in the profile header right next to the photo)
    - § Law School attended
    - § Hourly rate (this is voluntary information)
    - § Jurisdictions

- o Review of a client appears on right-hand side of profile header next to the information stated above

- o About

- ● Practice Areas (based on selected by the lawyer at the time of signup/edit profile)

- ● Client Reviews
    - o Rating out of 5 in numbers and stars
        - § Text: Out of # Reviews
    - o Reviews
        - § Rating in stars
        - § Comment
        - § Issue
        - § Name

·   Find me on the following platforms:
    o Facebook
    o Twitter
    o Linkedin
    o Xing
    o Google Plus

Module 11: Client's Dashboard

Please open this link only if you are logged-in as a client

Refer: https://www.upcounsel.com/dashboard

- Dashboard (Home)
    - Welcome to ProPandas!
        - ProPandas is the easiest solution for any business to get cost-effective and high quality legal services.
        - Post a Job
            - Get started by telling us about your business and legal needs. It only takes a minute and your information is strictly confidential.
        - Get Proposals
            - Our proprietary algorithm matches you with attorneys most qualified to handle your specific legal work. You can review proposals and schedule free consultations with no obligation.
        - Hire your Lawyer
            - When you're ready, instantly hire the attorney that's right for you.
- My Jobs
    - Filter Jobs (Filter; drop-down)
        - Jobs I Posted
        - In Progress
        - Completed
        - Canceled
    - Search Jobs (Search function)
- Documents (Online Data Storage)
    - Upload (BUTTON)
    - 3 Tabs:

■ View All
                    ■ View by Client
                    ■ View by Job
            ○ Search Documents (Search function)
    ● Invoices
            ○ Showing (Drop-down; linked to table below)
                    ■ All
                    ■ New -> Client should have options (1) Approve (2) Raise Dispute
                    ■ Paid
            ○ Filter/Sort by Jobs, Lawyer, Date/Time, Value,
            ○ Download (Client can select many by clicking on checkbox and download a summary in an excel/pdf)
    ● System Messages

Module 12: Client's Registration/Account Settings

https://www.upcounsel.com/account/edit

·   Basic Info

        o Basic Info
                § First Name (fill-in)*
                § Last Name (fill-in)*
                § Academic Degree (fill-in) <mark>[Daniel - do we want academy degree of the client as well]</mark> <mark>Yes, the client may fill it in (background: academic degrees are very important in Austria) but the client can fill in his own degree (because there are so many) and can also just leave it blank</mark>
                § Email (fill-in)*
                § Phone Number (fill-in)*
                § Address (Line 1)*
                § Address (Line 2)
                § City (Fill-in)*
                § Zip Code*
                § Country (Fill-in)*
                § Time Zone (Drop-down)* (Pick based on IP address))
                § Terms and Conditions*
                § Save (BUTTON)

        o Get Verified (Get verified to proof your identity to the lawyer and to benefit from ProPanda's Protection Program Why?)

- § Identity Proof (Upload)
- § Address Proof (Upload)
- § Why? (<mark>Benefit of getting certified - Daniel to write to stuff</mark>)
  - Resolving dispute by ProPandas
  - Get 3 times the proposals
  - Get complex jobs done

- o Organization Info
  - § Name (Fill-in)
  - § Address (Fill-in)
  - § ZIP Code (Fill-in)
  - § City (Fill-in)
  - § Country (Drop-down)
  - § Industry (Drop-down)
    - · Agriculture
    - · Construction
    - · Consumer Products & Goods
    - · E-Commerce
    - · Education
    - · Financial Services & Insurance
    - · Food & Beverage
    - · Government
    - · Health, Wellness & Fitness
    - · Healthcare
    - · Hospitality
    - · Life Sciences
    - · Marketing & Advertising
    - · Materials & Manufacturing
    - · Media & Entertainment
    - · Non-Profit
    - · None / NA
    - · Other
    - · Professional Services
    - · Real Estate
    - · Staffing & Recruiting
    - · Technology
    - · Telecommunications
    - · Transportation & Logistics
  - § Number of Employees (Drop-down)
    - · I am an individual
    - · 1-10
    - · 11-50

- · 51-200
- · 201-500
- · 501-1000
- · 1000+
- o Connect your Accounts
  - § LinkedIn
    - · Connect to LinkedIn (BUTTON)

· Profile Photo
  - o Text: Change your profile photo. This photo is only visible to attorneys.
    - § PHOTO
    - § Change Photo (BUTTON)

· Change Password
  - o Text: Use the form below to change your password. New passwords are required to be a minimum of 8 characters in length.
    - § Current Password (fill-in)
    - § New Password (fill-in)
    - § Re-enter Password (fill-in)
    - § Save Password (BUTTON)

· Billing Info
  - o Text: Use this area to manage your payment methods for hiring. (Mandatory before the client can hire a lawyer for a job. Client doesn't need to fill this information to register or to post a job).
  - o Add a Payment Method
    - § Add a Credit Card (BUTTON; links to see below)
      - · ADD A CREDIT CARD
      - · Text: Use the form below to add a new credit or debit card.
      - · Payment Information
        - o Name on Card (Fill-in)
        - o Card Number (Fill-in)
        - o Expiration Date (Drop-downs for month and year)
        - o CVC (Fill-in)
      - · Billing Address
        - o Address (Fill-in)
        - o City (Fill-in)
        - o ZIP Code (Fill-in)
        - o Country (Drop-down)

- · Text: By using our service, you agree to pay all ProPandas lawyers through the ProPandas platform, including subsequent projects and transactions not related to the initial project. This policy protects both clients and lawyers and allows ProPandas to guarantee the quality of legal work if disputes arise.
- · I agree to these terms (CHECK BOX)
- · Add Card (BUTTON)
- § Instantly Connect My Bank Account (BUTTON)
  - · Text: Only available for selected banks. Don't see your bank listed? Click here (LINK to see below) to add your bank information manually.
    - o ADD NEW BANK ACCOUNT INFORMATION
    - o Text: Use the form below to add a new bank account. If you wish to use this account as a payment method, you'll need to follow the verification process in order to authorize ProPandas to withdraw funds from the account. The verification process is as follows:
    - (1) We'll make 2 small deposits into your account (appears on your statement as "VERIFICATION")
    - (2) Wait 1-3 business days for those debits to appear on your statement or online banking portal
    - (3) Return to ProPandas to enter those amounts.
    - o NEW BANK INFORMATION
      - § First Name (Fill-in)
      - § Last Name (Fill-in)
      - § BIC (Fill-in)
      - § IBAN (Fill-in)
    - o Text: Your information is secure. Learn more (LINK)
    - o Text: By using our service, you agree to pay all ProPandas lawyers through the ProPandas platform, including subsequent projects and transactions not related to the initial project. This policy protects both clients and lawyers and allows ProPandas to guarantee the quality of legal work if disputes arise.
    - o I agree to these terms (CHECK BOX)
    - o Cancel (BUTTON)

o Add Account (BUTTON)

·   SMS Notifications

     o Text: Verify your phone number to receive SMS notifications.

     o Add your phone number (fill-in)

     o Send Verification (BUTTON)

     o Notification preferences

          § New proposals (CHECK BOX)

               ·   Text: Receive a text notification when you receive new proposals from lawyers.

Module 13: Client's Proposal Page (Same as Post a Job landing page)

https://www.upcounsel.com/jobs/5dd2ec1a245c7d122efc3f2a/proposals

It's a page where a number of lawyers are listed for a given job. Lawyers who have shown interest on the specific jobs are visible in a tabular format with a brief profile. Client sees the estimated fee quote. Also the lawyer's rating.

Client can select which lawyers to invite a proposal from. Client can also reject certain lawyer's proposals.

Module 14: Laywer Rating System

[client can rate the lawyer and each job separately]

1 to 5 Stars

Short Text (up to 100 Words)

First Name of Client is shown, Last name just the initial, after the name there is the organization if applicable

Module 15: Payment

This is the landing page after the approval of the invoice. After approval, we ask the client to make the payment.

Connect to Paypal

Separately show fees of ProPandas and of the lawyer

Module 16: Administrative Control

Admin login

Right to Activate/Deactivate a client

Right to Activate/Deactivate a Lawyer

A way to recieve/send "System Messages" to Lawyers and Clients

A way to add/delete/edit free legal documents

A way to approve publishing of articles written by Lawyers

Appendix: Optional Modules

Module 1: How It works

A short video of about 90 seconds that explains how website can be used.

Please refer to https://www.upcounsel.com/howitworks

This module is to be created at the end. Please create a placeholder for it, but do not create a video for now.

Module 2: Lawyer's Quote Calculator

I would suggest to leave Module 2 out for now.

In Module 8: under the dashboard of the lawyer eventually there should be a "Documents" functionality

- Documents (Online Data Storage) [Home/Root]
  - Lawyer can create a folder structure under the documents
  - Upload (BUTTON)
  - 3 Tabs:
    - View All
    - View by Client
    - View by Job
  - Search Documents (Search function)
- Calls
  - Connect Your Calendar for Automatic Call Scheduling

    § Text: Connect your calendar so that clients can easily schedule calls with you. Neither ProPandas nor clients will see the information on your calendar – only the blocks of time you are available. Learn More (LINK to page full of text)

    § Connect Your Calendar (BUTTON)

  o Call History (Table)

§ Text: Only includes calls made with your ProPandas number.

- My Calendar
  - It shows the calendar for the lawyer
  - Lawyer can send a meeting request in which case, lawyer will need to add other people's email address or add clients
  - Lawyer can put a place holder/reminder for him to work on a project with some details
  - Lawyer can share his calendar with "everyone" or with "existing clients" or with clients "submitted proposals" or "with specific clients and other lawyers, he wants to share with"
  - If a calendar is shared with the user, the user can put up a request for a meeting/call, if the lawyer or the client is not busy at the time
  - If someone else puts a request on your calendar you have the option to accept or reject or propose an alternate time
  - When the lawyer shares his calendar, other people can only see if the lawyer is busy or available but no other details

Module 16: Contract for the Job

[Daniel - we should think about this little bit on what information we want to capture at the time of a client and attroney agree on a job]

- Messages (Messenger Application; attachments are possible)
  - 4 Tabs:
    - All
    - Active Jobs
    - Prospective Jobs
    - Unread
    - System