ACTIVE WORKDESK

WORK FROM HOME

DOCUMENTATION

Author : Active IT zone
Software Framework : Laravel
Provided by : codecanyon

Documentation

For online details documentation Click Here

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How to in Details

This section elaborates the actions of the admin

1. **What is workdesk?**

   Answer:

   Workdesk is a simple web application online platform where clients can post projects and freelancers can bid for those projects. It’s developed with Laravel, a framework of, PHP and Bootstrap for making this completely responsive.

2. **How to install the script?**

   Answer:

   To install the script, one needs to follow the below steps:

   - Extract downloaded from codecanyon on your PC.
   - **Upload** the Install.zip file to your server **public_html** or any other **directory** you intend to run the script.
   - **Extract** the zip file in that directory.
   - Create a new database from your server **MySQL database**.
   - Create a db **user** to the database and link that **database** to the **db user**.
   - First hit your **site url** and it will automatically take you to the **installation**.
   - Click on **Start Installation Process**.
   - You will get the **Checking File Permission** page. If everything is ok then click on **Go to the next step**.
   - Now you need to set **Database Host, Database Name, Database Username, Database Password** and click **Continue**.
   - Now you need to **import the sql file**.
   - Now **fill up the information for the website** and click **Continue**.
   - Click on **Go to Home/ Login to the admin panel**.

3. **How to update to the latest version?**

   Answer:

- **Extract** the downloaded file from codecanyon.
- There you will get a zipped folder named **updates.zip**. upload that to the root directory on your server where your previous version is running & **Unzip** that file and replace all files.
- Now **reload** the home page and click on '**Update Now**'.
- It's Done! The full system has been updated with a single click.
- Let's Browse Active Workdesk cms Latest Version

4. **How to activate the script?**

   Answer:

   Following the given procedure below will make the license activated for your domain and you'll be able to use the script smoothly:

   - Open the link in the browser. https://activeitzone.com/activation/
   - In the respective fields, put your **Name**, **E-mail**, **CodeCanyon Username, Purchase Key** and your intended **domain name** for the script and verify the captcha.
   - The form will be submitted to check the purchase key and then activate the licence for that domain.
   - You can change the activation later from this same form. Activating a Regular License again with another domain name will remove the activation of the previous domain.

5. **How many types of users are there?**

   Answer:

   There are mainly three types of users in **workdesk** and they are:

   I. System Admin
   II. Clients
   III. Freelancers

6. **How does the admin create Packages for users?**

   Answer:

   There are two types of packages in workdesk, which are:

   - Client Package
   - Freelancer Package

Admin can create these packages by following the below steps:

- First of all, the **Admin** needs to login into his panel.

Client Package:

- Go to the **Clients > Client Package**
- Click on **Create New Package**
- Fill up the fields with information
- Finally, click on **Create New Package** button.

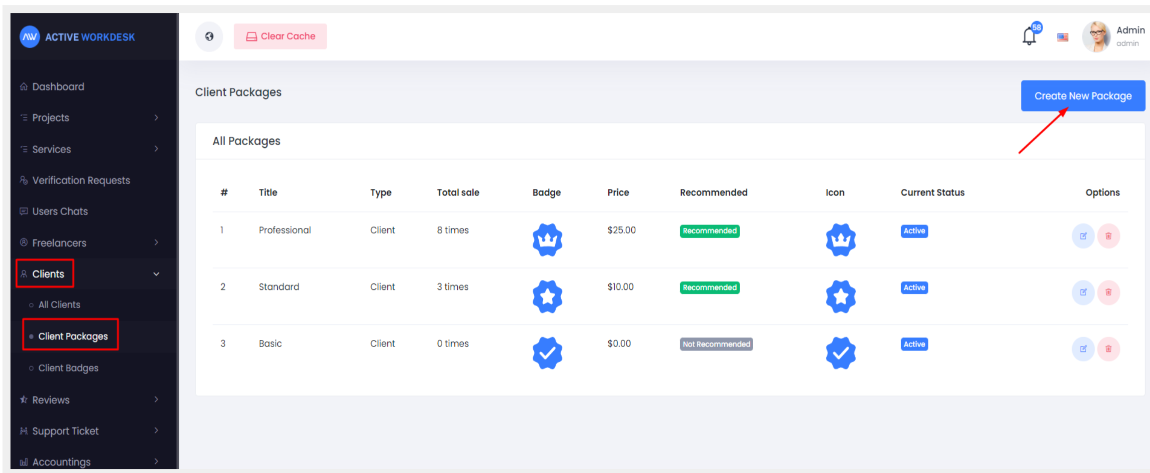


Figure (6a): Create a new package for Clients from Admin.

Freelancer Package:

- Go to the **Freelancer > Freelancer Package**
- Click on **Create New Package**
- Fill up the fields with information
- Finally, click on **Create New Package** button.

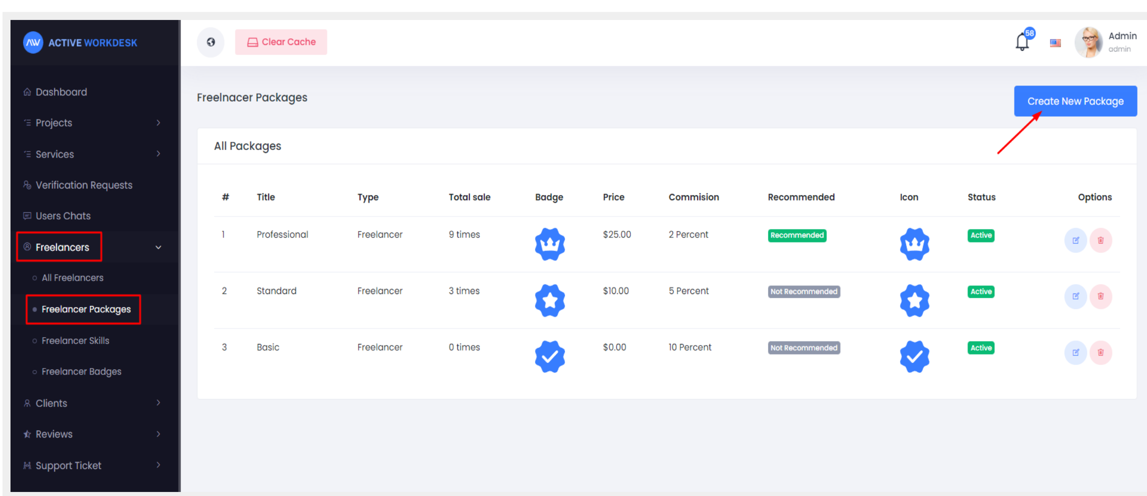


Figure (6b): Create a new package for Freelancer from Admin.

7. **How does the admin create Project Category?**

Answer:

Admin can create Project Category for **clients** and **freelancers**. To create Project Category Admin needs to follow the below steps after login into his panel:

- Go to **Projects** > **Project Category.**
- There, admin will get a form for creating a **new Category** on the right side of that page.
- Admin needs to fill up that form with **name**, **parent category**(if parent category exists), and **icon image** (.svg file recommended).
- Finally, Click on **Save New Category**.

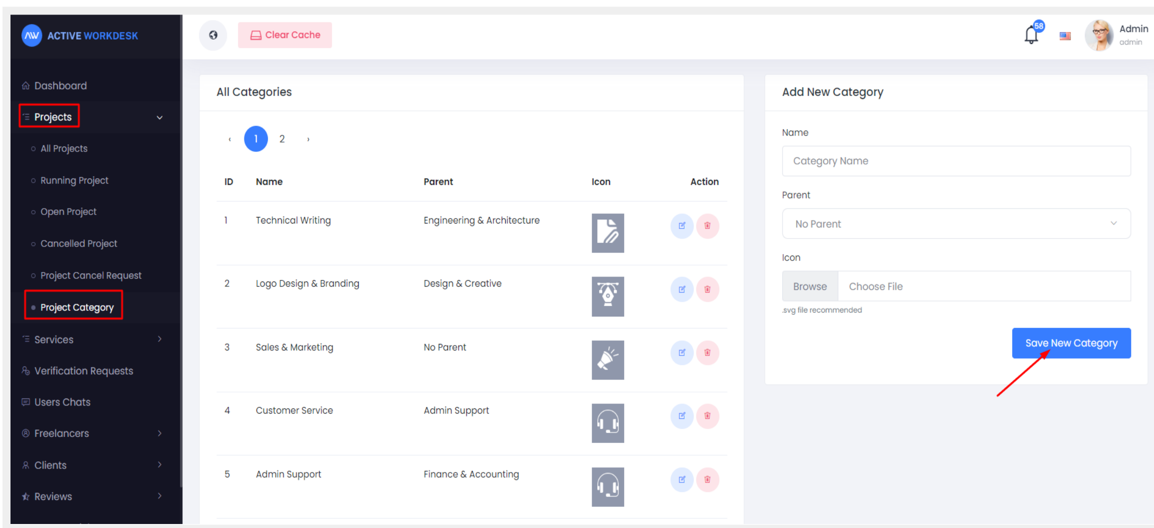


Figure (7a): Create a new project category from Admin.

8. **How does the admin create Badges for users?**

Answer:

Admin can **create Badges** for clients and freelancers. To create a new Badge Admin needs to follow the below steps after login into his panel:

Freelancer Badge:

- Go to the **Freelancers** > **Freelancer Badge**
- There, admin will get a form for **adding a new Badge** for freelancers at the right side of that page.
- Admin needs to fill up that form with appropriate data.
- Finally Click on **Add New badge**.

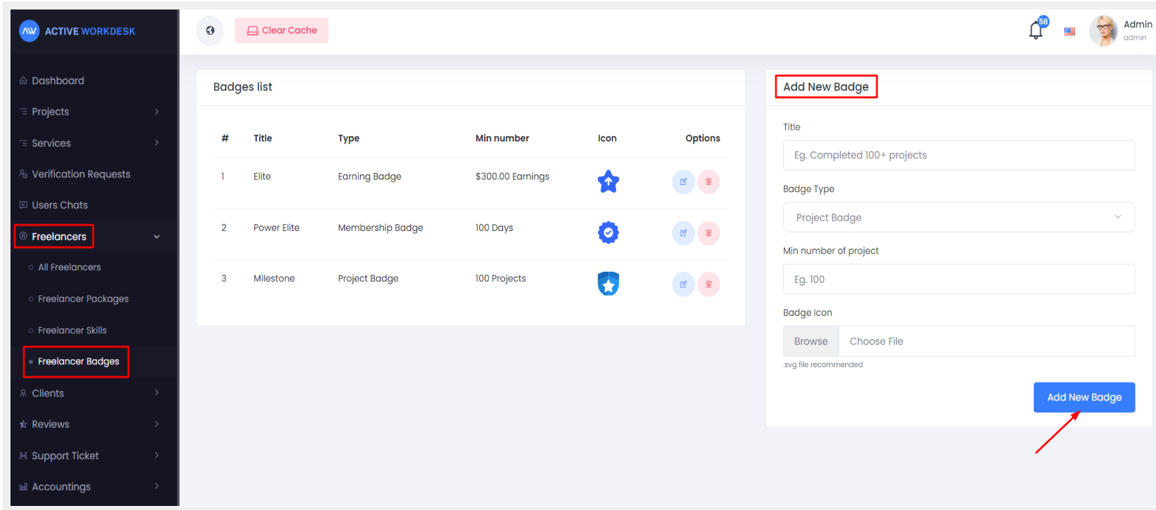


Figure (8a): Add new badge for a freelancer from Admin.

Client Badge:

- Go to **Clients** > **Client Badges**
- There, admin will get a form for **adding a new Badge** for clients at the right side of that page.
- Admin needs to fill up that form with appropriate data.
- Finally Click on **Add New badge**.

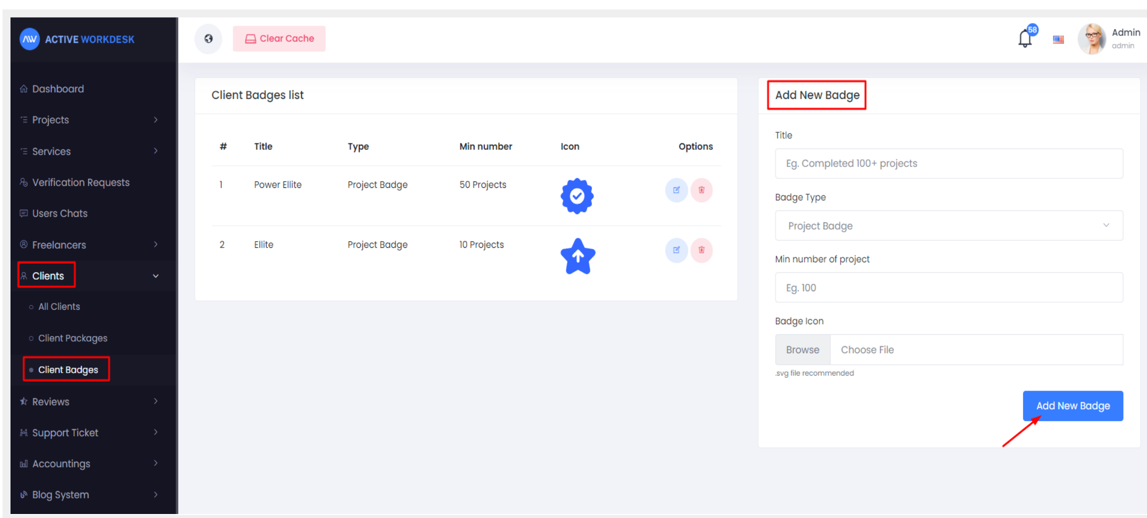


Figure (8b): Add new badge for a client from Admin.

9. **How does the admin create Skills for freelancers?**

Answer:

Admin can create Skills for freelancers. To create a new Skill Admin needs to follow the below steps after login into his panel:

- Go to **Freelancers > Freelancers Skill**
- There, admin will get a form for **adding a new Skill** for freelancers at the right side of that page.
- Admin needs to fill up that form with appropriate data.
- Finally, Click on **Add New Skill**.

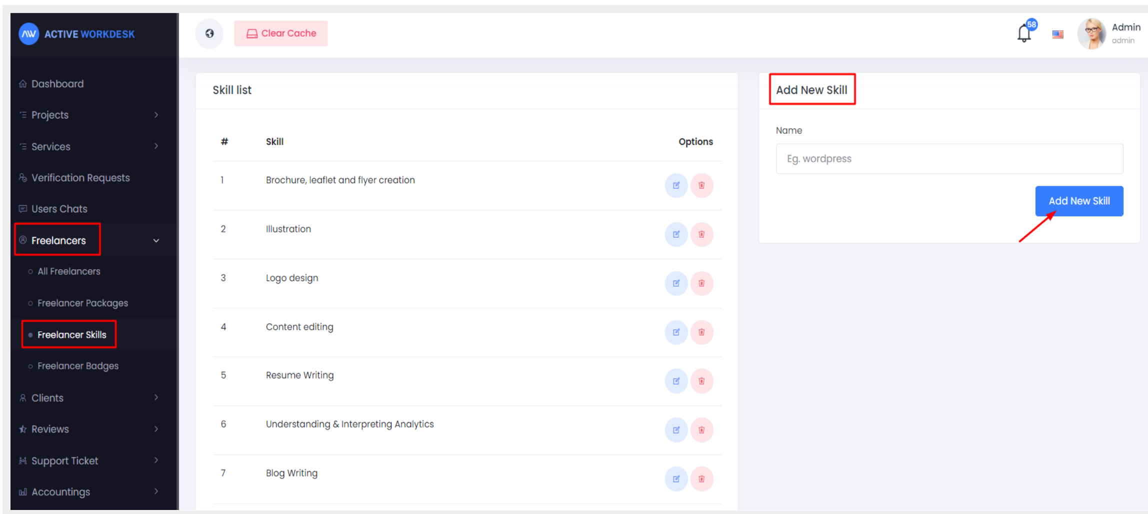


Figure (9a): Add new skill for a freelancer from Admin.

10. How does the admin manage projects?

Answer:

Admin can check all types of projects from the admin panel. There are individually listed all projects.

- All Projects List
- Running Project List
- Open Project List
- Canceled Project List

These all are under the Projects menu at the left sidebar.

11. How does the admin manage Project cancel Request?

Answer:

If any client hires any freelancer for any project and then if the client wants to cancel the project, in that case the admin will manage the entire procedure.

- The client who wants to cancel the project sends a project cancellation request to the admin.
- Admin can find that request by going to the **Project Cancel Request** sub-menu under the **Projects** menu from the left sidebar.
- Admin will check the reason for project cancellation and contact with the other side.
- By following a conversation procedure finally the admin will decide what he/she needs to do.

12. How does the admin manage review?

Answer:

The admin can manage the reviews for clients and freelancers. Admin can see all client's rating lists and if the admin wants he can also check any specific client's all reviews by going to the **Client Review** sub-menu under the **Reviews** Menu.

Admin can also see all Freelancer's rating lists and if the admin wants he can also check any specific Freelancer's all reviews by going to the **Freelancer Review** sub-menu under the **Reviews** Menu.

13. How does the admin manage accounts?

Answer:

The admin can manage and check all accounts-related information like:

- Project Payment History
- Client package purchase history
- Freelancer package purchase history
- All requests for milestone payments
- Account Summary

Admin will get all of these submenus under the **Accountings** menu into the admin panel from the Left navbar.

14. How does the admin manage employees?

Answer:

The admin can manage all employees and their roles. To manage this admin needs to follow below steps:

Step - 1:

- Login into the **admin panel** and go to **Employee** > **Employees Role**
- Click on **Add Role**
- Admin just needs to put the **role name** and **enable** the switch of the permission
- Then click on **Save**.

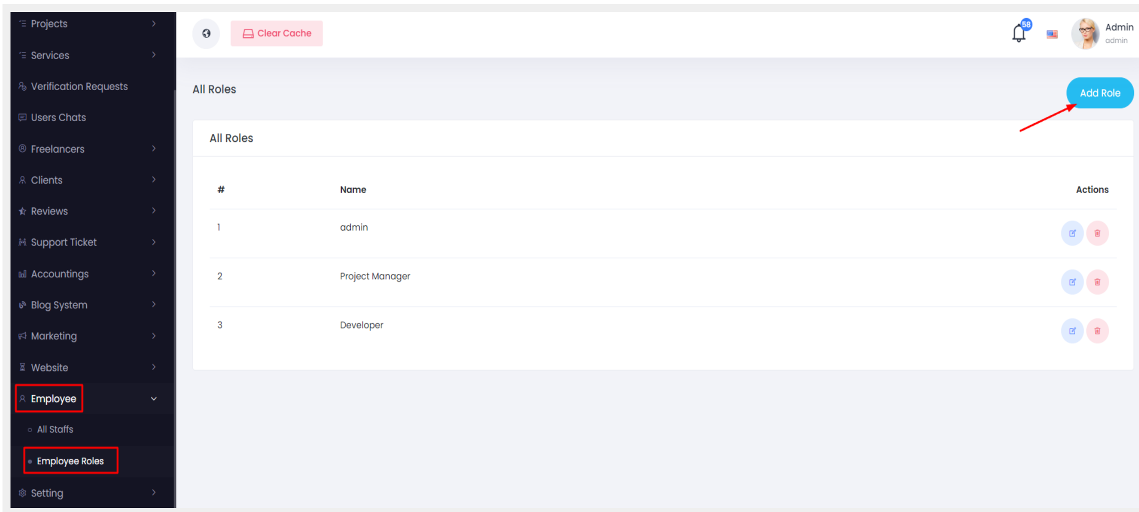


Figure (14a): Add employee role from Admin.

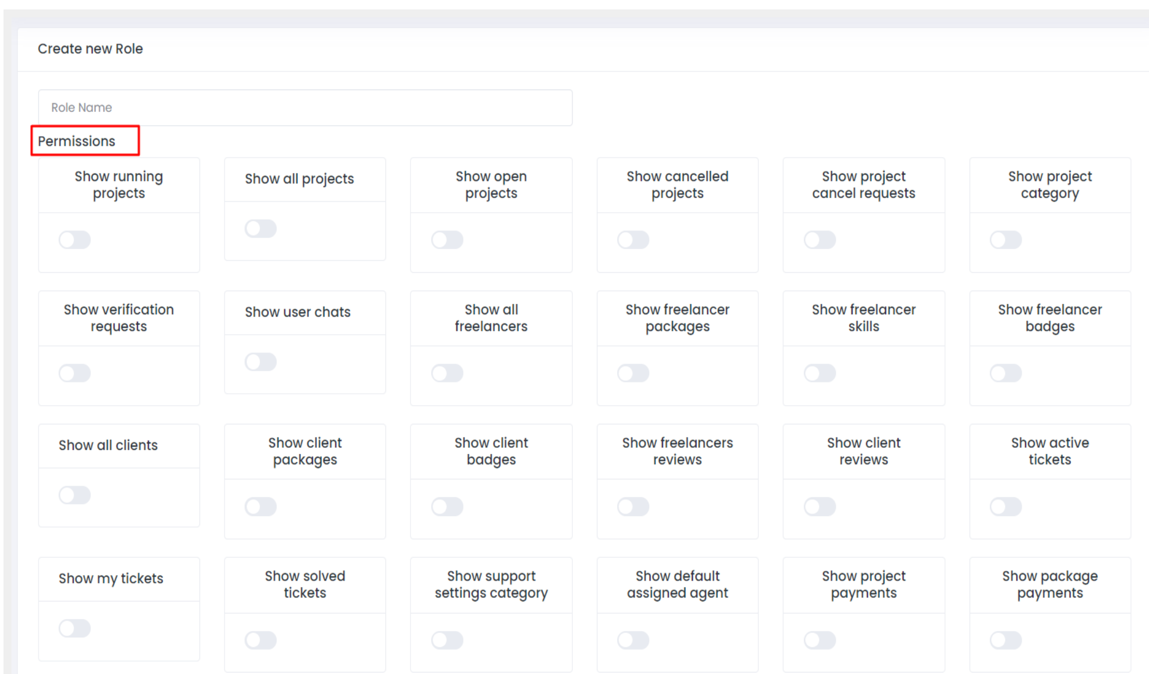


Figure (14b): Enable employee role permission switch from Admin.

Step - 2:

- Now click on **All Staff** from the left navbar
- Here you can find the staff name, email and role, also can add new staff.
- Click on **Add Staff**
- Insert the employee name, e-mail, and password, select the role, and click on **Save** button.

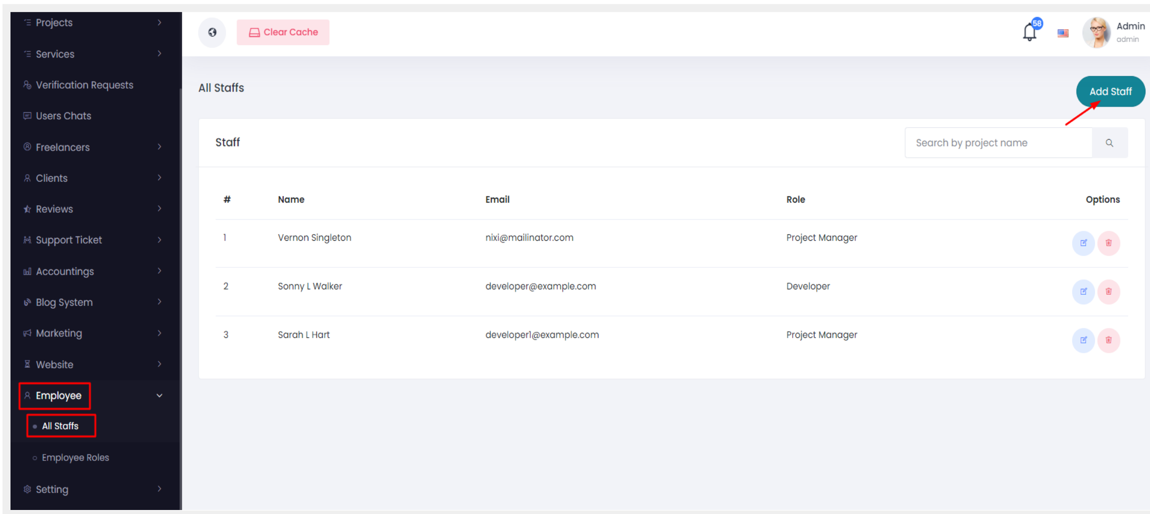


Figure (14c): Add new Staff from Admin.

15. How does the admin set up currency?

Answer:

To add currency Admin needs to follow the below steps:

- Go to the **setting** > **system currency**
- Select the **system default currency** and **save**.
- Select **symbol format** & **no of decimals** and **save**.
- For **adding** new currency:
    - Click **Add New Currency**
    - Fill the form with **Name(eg US Dollar), Symbol(eg $), Code(eg USD), exchange rate(1USD = ? eg 100)**
    - And then click **save.**
- You can also edit a currency

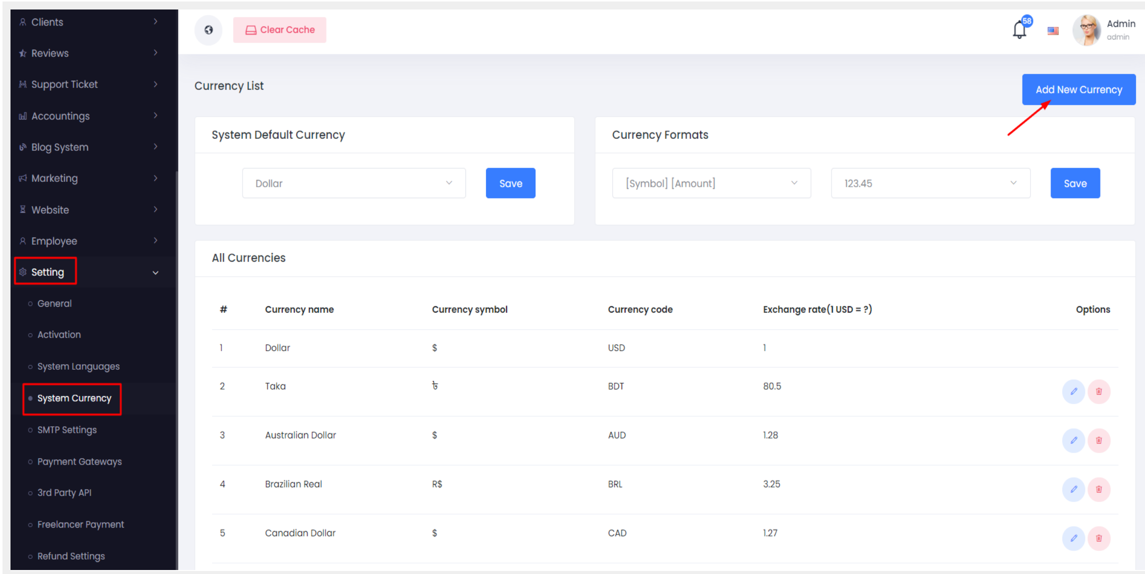


Figure (15a): Add new currency from Admin.

16. How does the admin add a language?

Answer:

To add language Admin needs to follow the below steps:

- Go to **Setting** > **System Language**
- There, the admin will find the all-language list and to **add a new language** he/she will find a **form** on the **right side** of that page.
- Insert **Name**, choose the **country code**, enable/disable language RTL switch then click on **Create**
- From there Admin can also set the default language for the system.

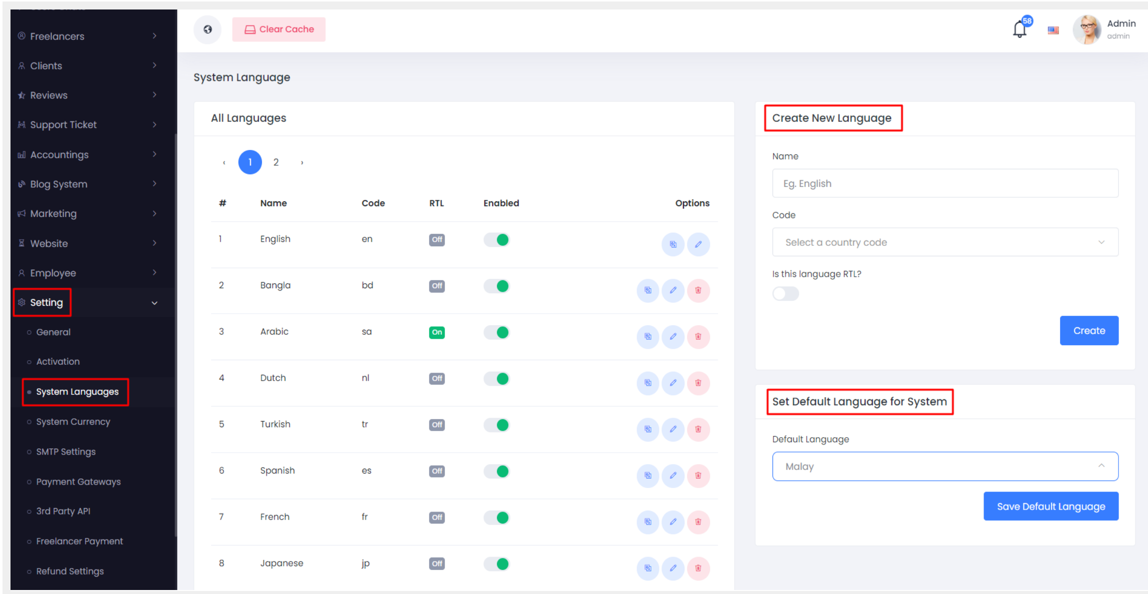


Figure (16a): Add new language from Admin.

17. How does the admin send money to freelancers?

Answer:

Admin needs to follow the below instruction for sending money to freelancers:

- Go to **Accountings** > **Freelancers Withdraw Request**
- There, the admin will find the all withdraw requests lists.
- Admin will click on the **Pay Now** action.
- From there Admin will insert the money sending details with receipt and then click on the **Paid** button.
- Admin can send money to freelancers via bank on paypal and for this freelancer needs to set his/her payout information.

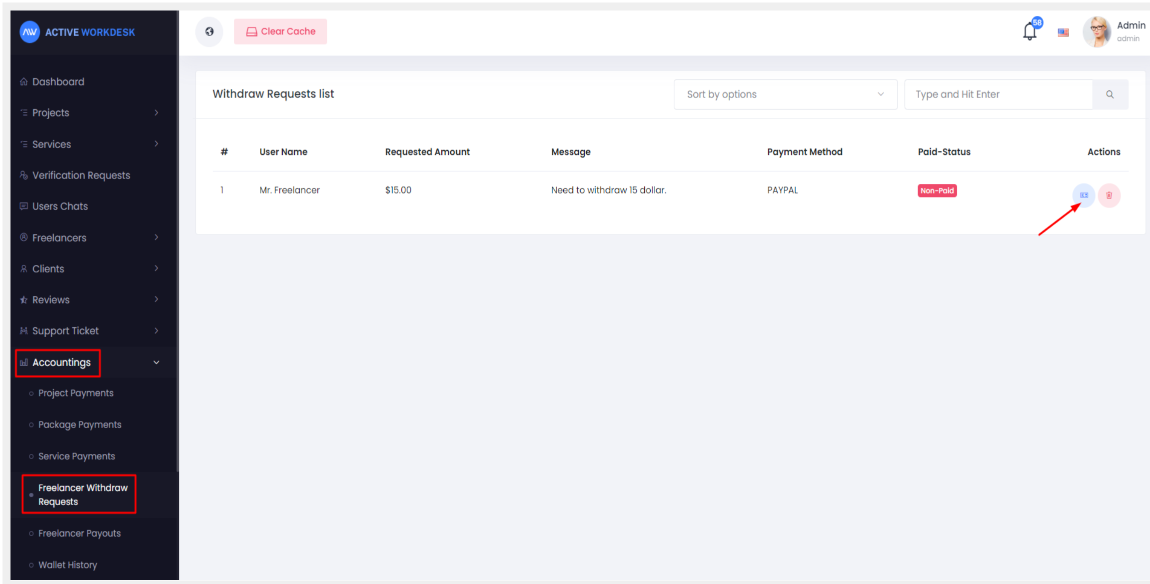


Figure (17a): Admin sends money to the freelancer

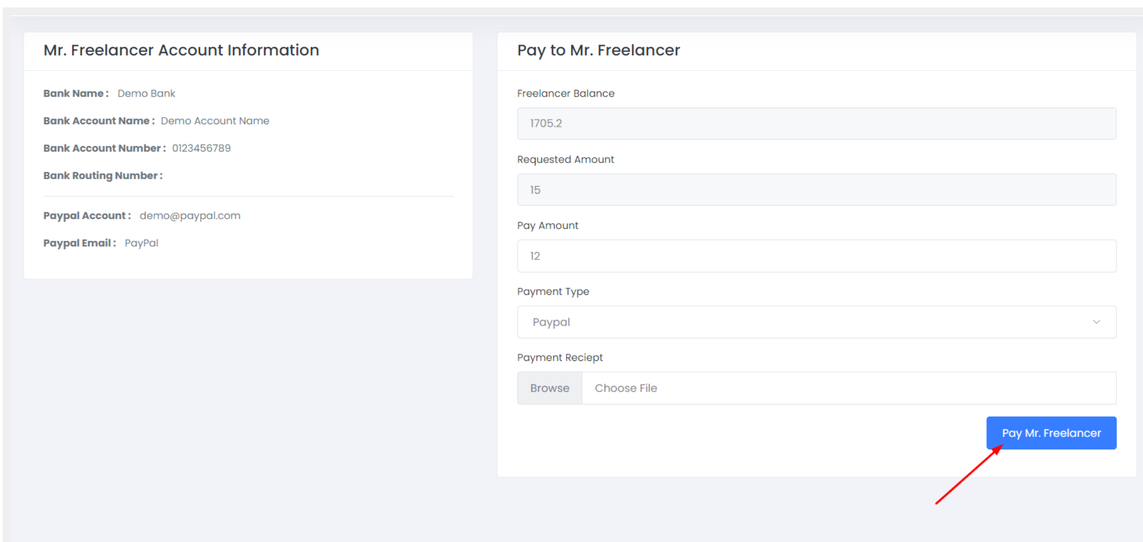


Figure (17b): Admin sends money to the freelancer-(i)

18. How can the admin add the freelancer's wallet balance?

Answer:

Follow the instruction:

- Go to **Freelancers** > **All freelancers**
- Here you can see the freelancers' list
- From the **Add Wallet Balance** action admin can **confirm** the **recharge wallet amount**.

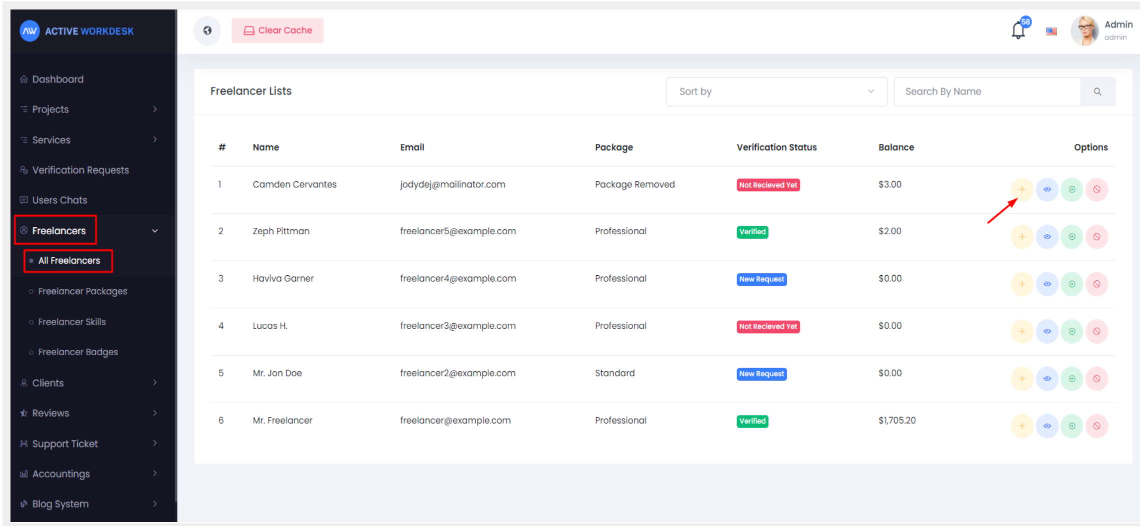


Figure (18a): Admin adds freelancer’s wallet balance

19. How does the admin configure social media and 3rd party API?

Answer:

To configure social media and 3rd party configurations Admin needs to follow the below steps:

- Go to **Setting** > **3rd party API**
- Here you can find Social Media & Other 3rd Party Configuration page
- Now admin needs to **enable** the **activation switch** and **insert** the necessary information and click on **Update** button

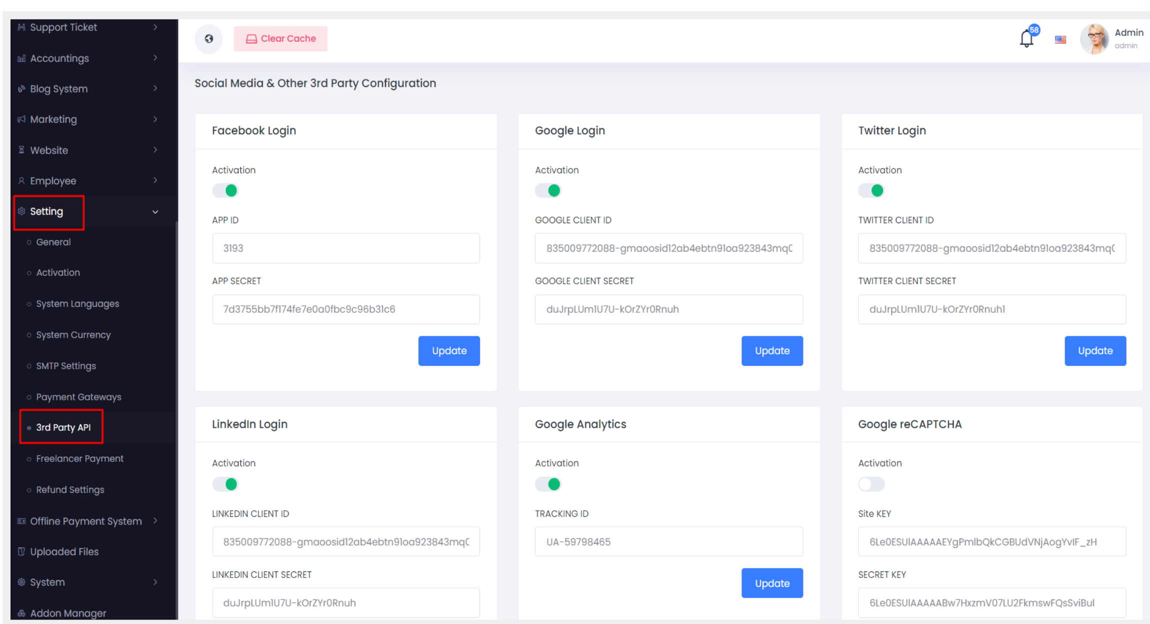


Figure (19a): Admin configure social media and 3rd party API

20. How to generate Google reCAPTCHA?

Answer:

Follow the instruction:

- Sign up for your API key pair for your site. [Click here](#).
- Select **V3 admin console**.
- Type your website URL in the **label** section.
- Then select recaptcha type: **reCAPTCHA v2**.
- Enter your website URL under **Domains.**
- Enter the emails of the administrators.
- Accept reCAPTCHA Terms of Service.
- Submit the form. Your API keys will be generated.

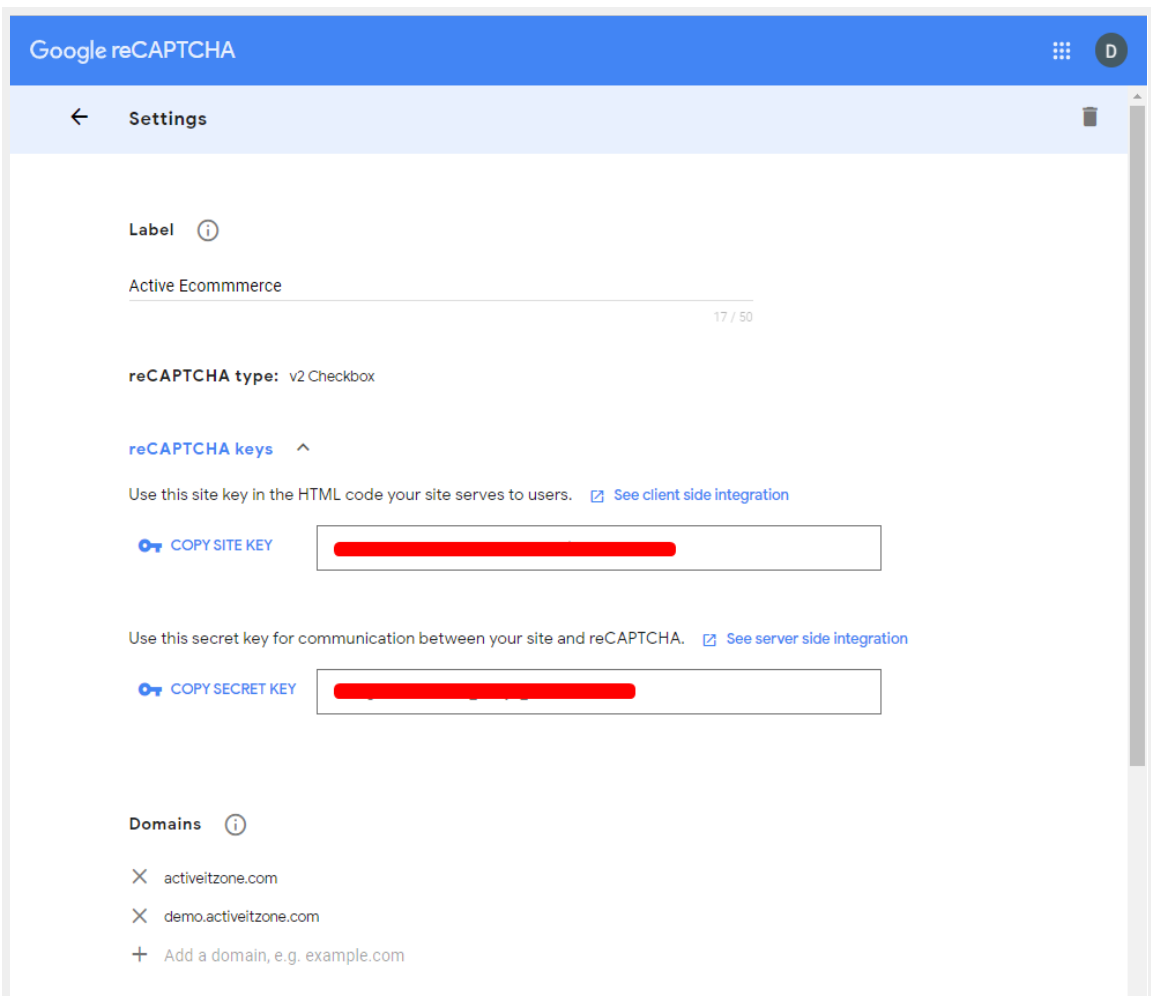


Figure: (20a) Google reCaptcha site

- Now log in to your **admin** panel.
- Go to **Setting > 3rd party API**
- Now enable **the Google reCAPTCHA** switch
- Copy the **Site KEY** and **SECRET KEY.**

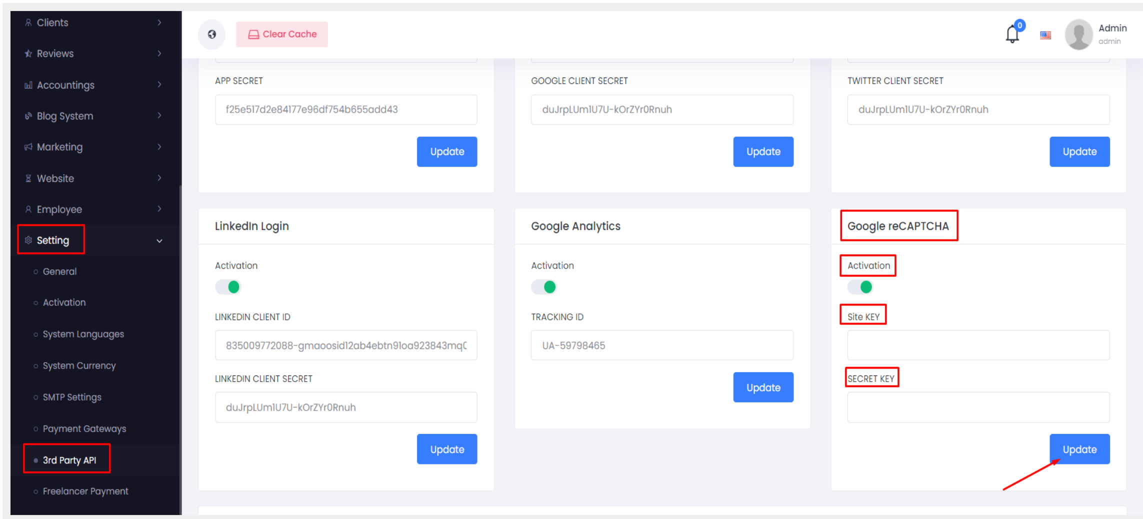


Figure: (20b) Google reCAPTCHA setting

21. How do exchange messages between freelancers and clients in any running project?

Answer:

Please follow the below procedure:

- First of all, the **admin** needs to **enable chat activation**
- For enabling the chat activation please follow the procedure:
  - Admin needs to **log in**
  - Go to **Setting** > **3rd Party API**
  - From the Running, Project Chat **enable** the **chat activation switch** and insert the valid API key, Auth Domain, Database URL, Project ID, Storage Bucket, messaging sender ID, App ID, FCM server key, Public Vapid Key
  - Now click on **Update**

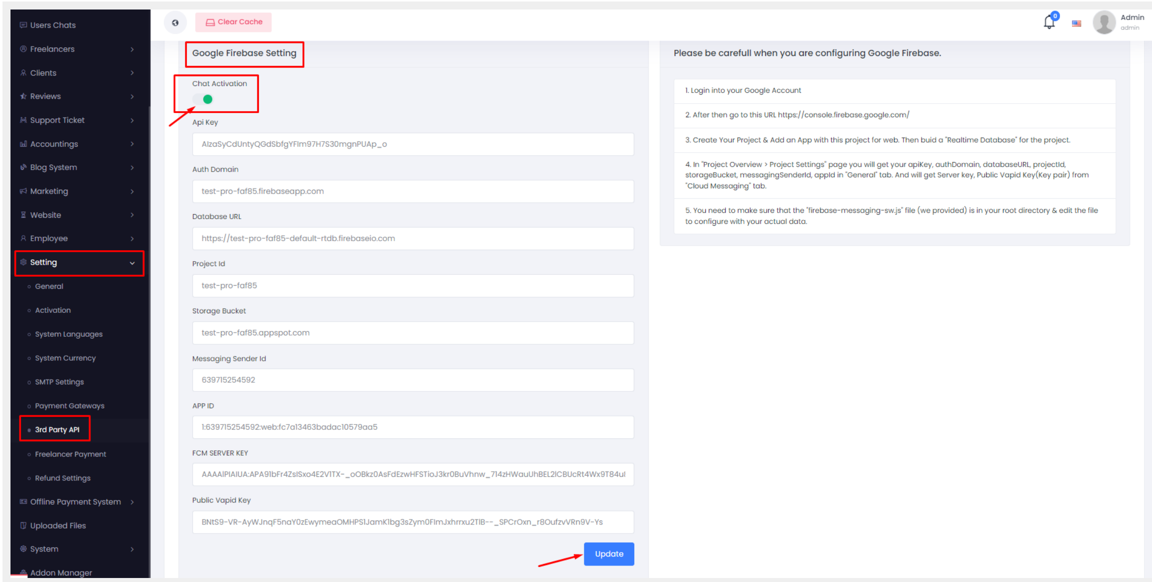


Figure: (21a) enable chat activation

Now for exchange message follow the procedure:

- **log in** as a **freelancer**/ **client**
- Now go to **Projects** > **Running**
- Click on **message** option
- And freelancer and client can exchange message between them

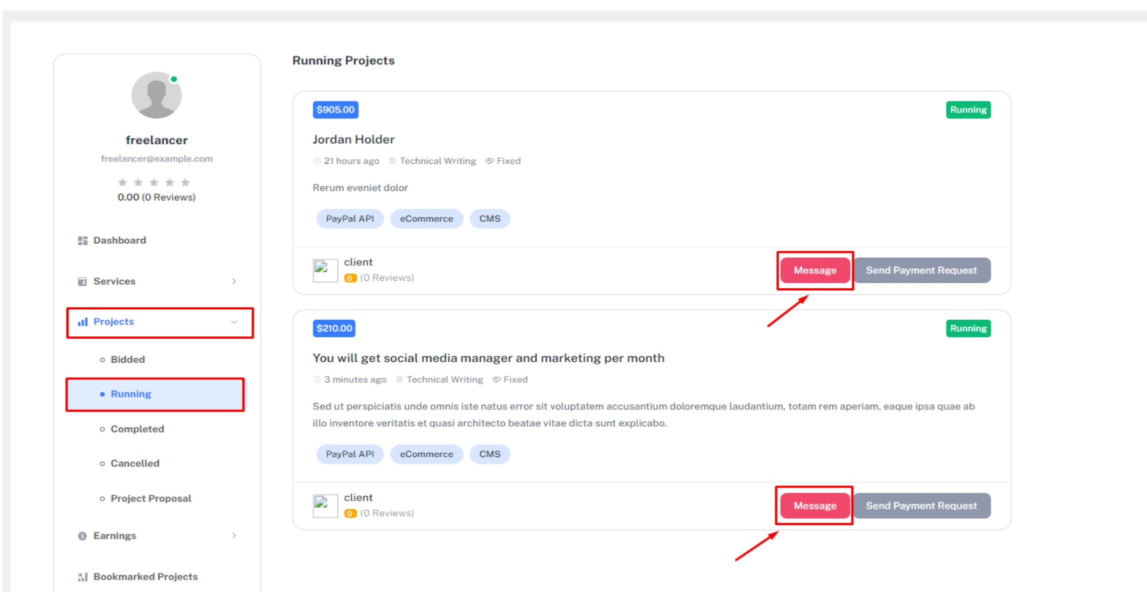


Figure: (21b) Give a message from freelancer panel

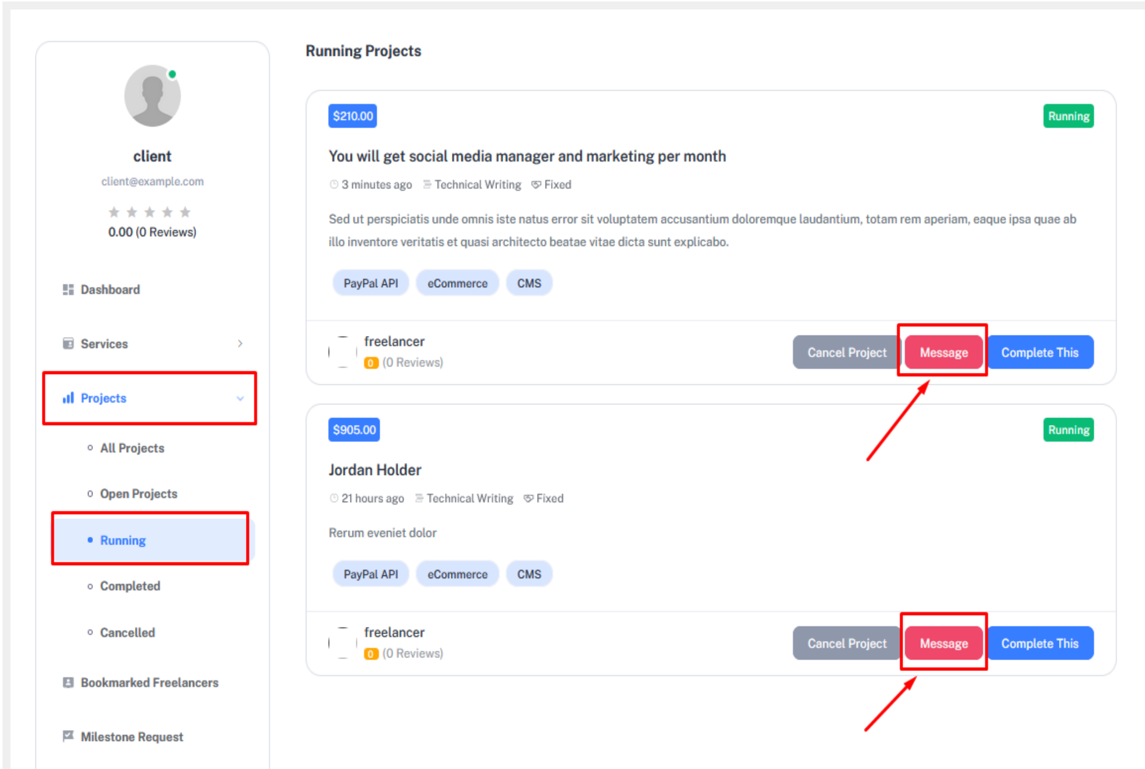


Figure: (21c) give a message from the client panel

22. How to configure the Firebase console setup for Running Project chat?

Answer:

To use Firebase follow the procedure which is mentioned below

- Go to this URL to create a project https://console.firebase.google.com/u/0/

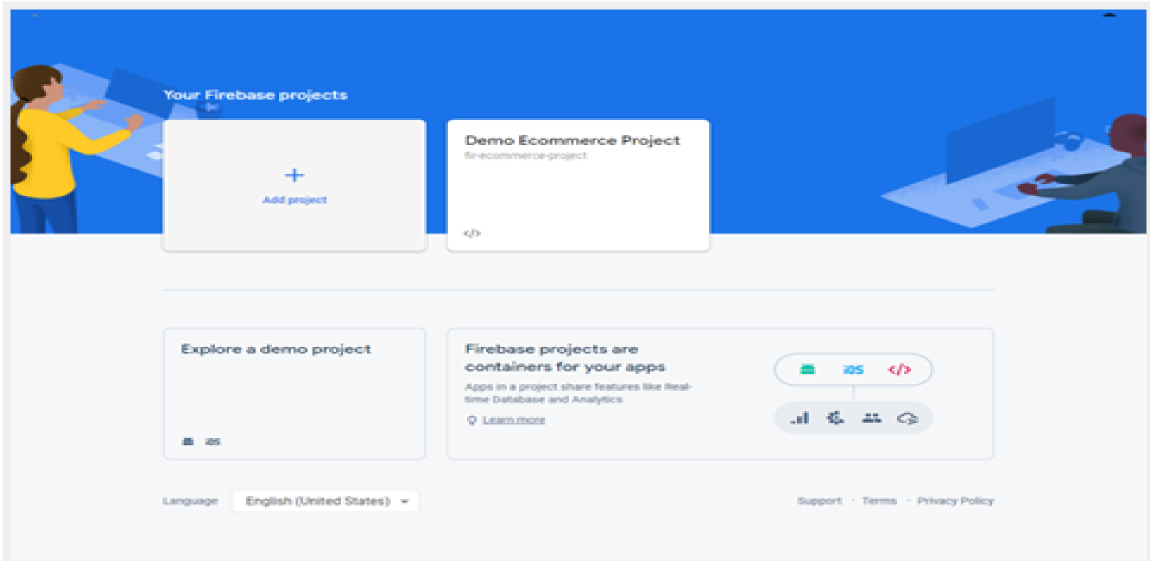


Figure: (22a) Go to URL

- Enter project name and then click on **continue** button

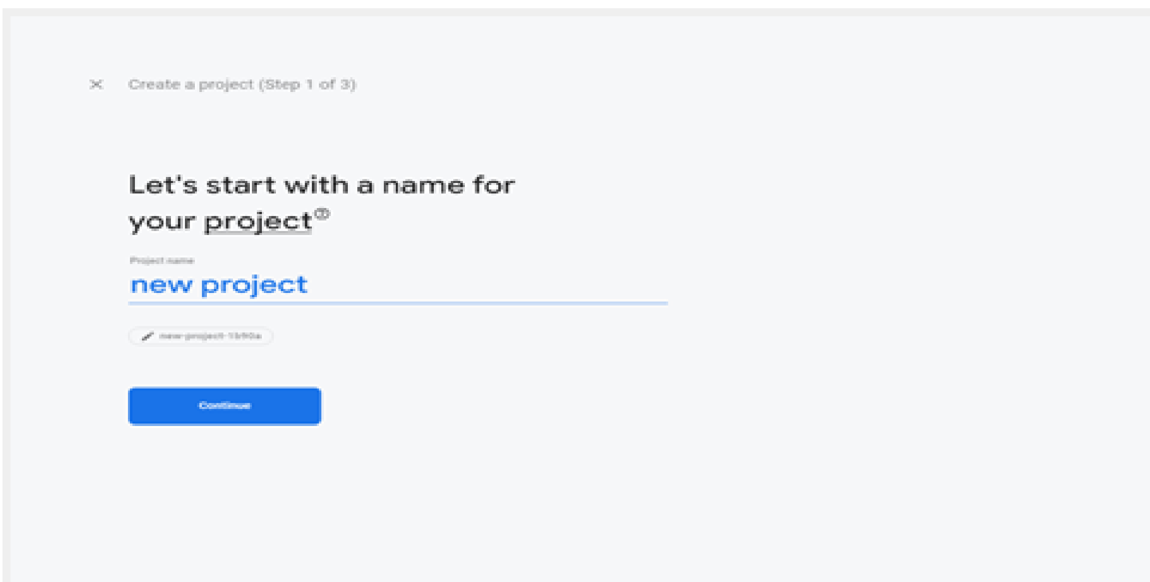


Figure: (22b) Insert project name

- Disable the Google analytics for this project option and click **Create project** button

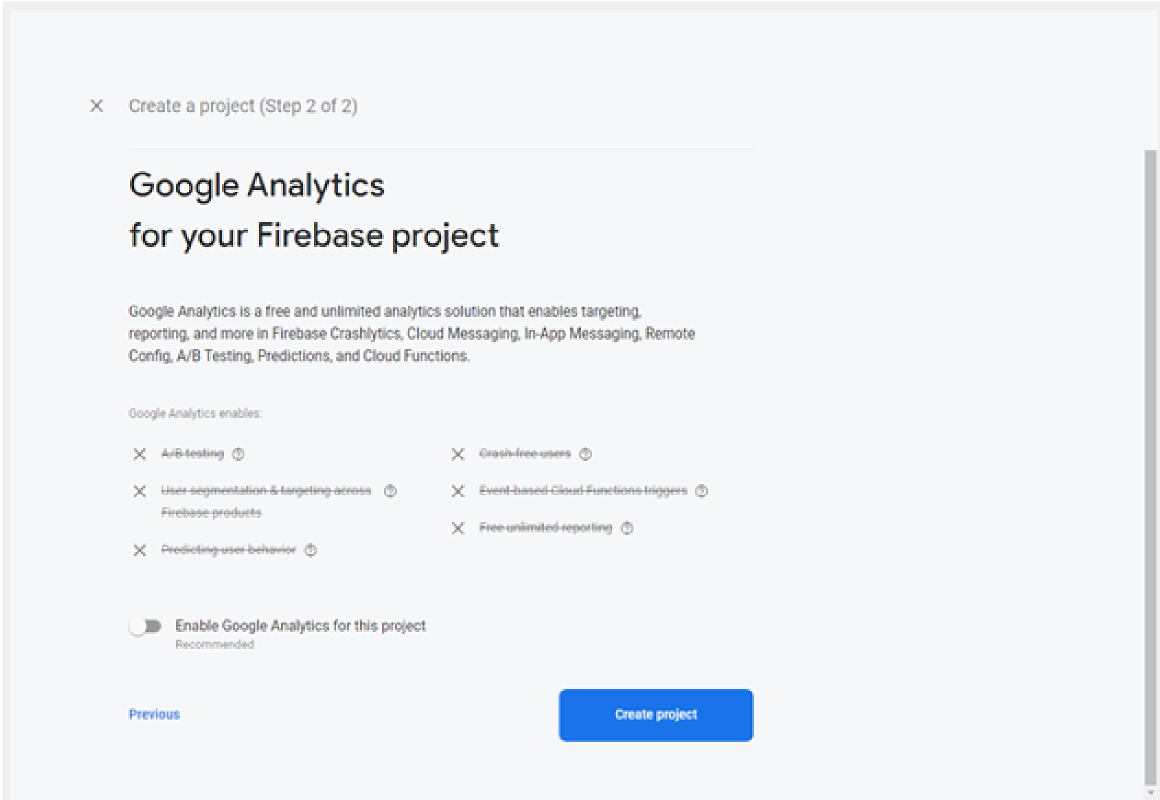
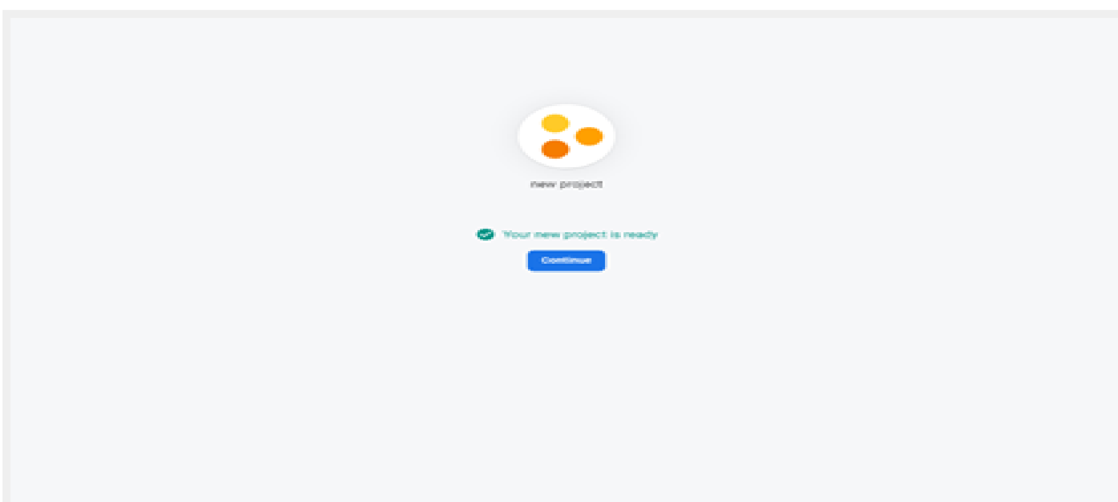


Figure: (22c) clicking the project create button

- After then click on **continue** button



- After then you need to add an app for web.

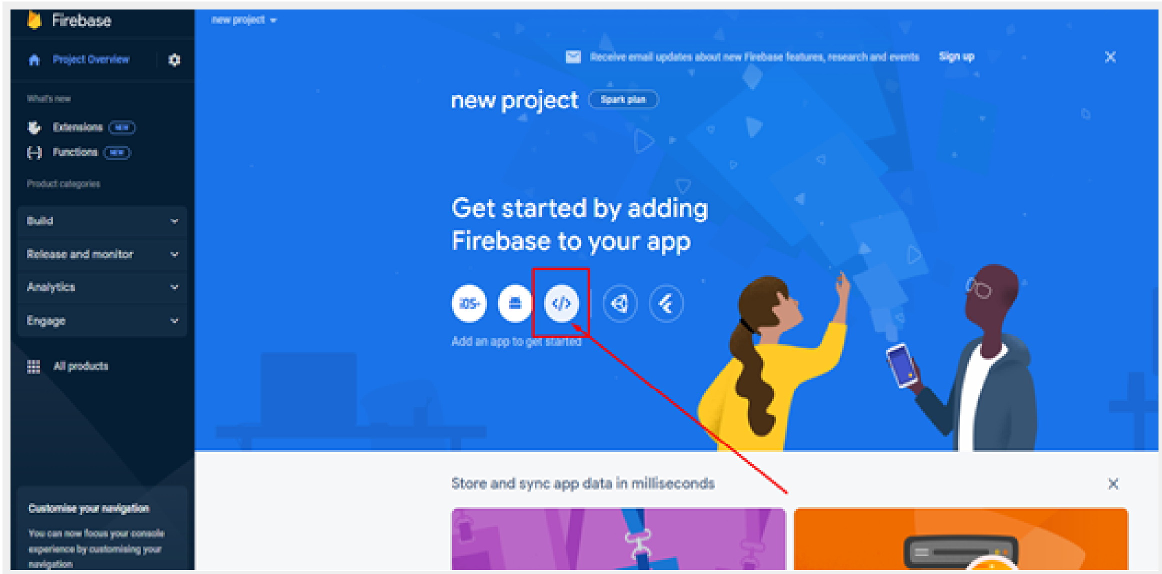


Figure: (22d) Adding app for web

- Put your app nickname & then click on the **Register App** button

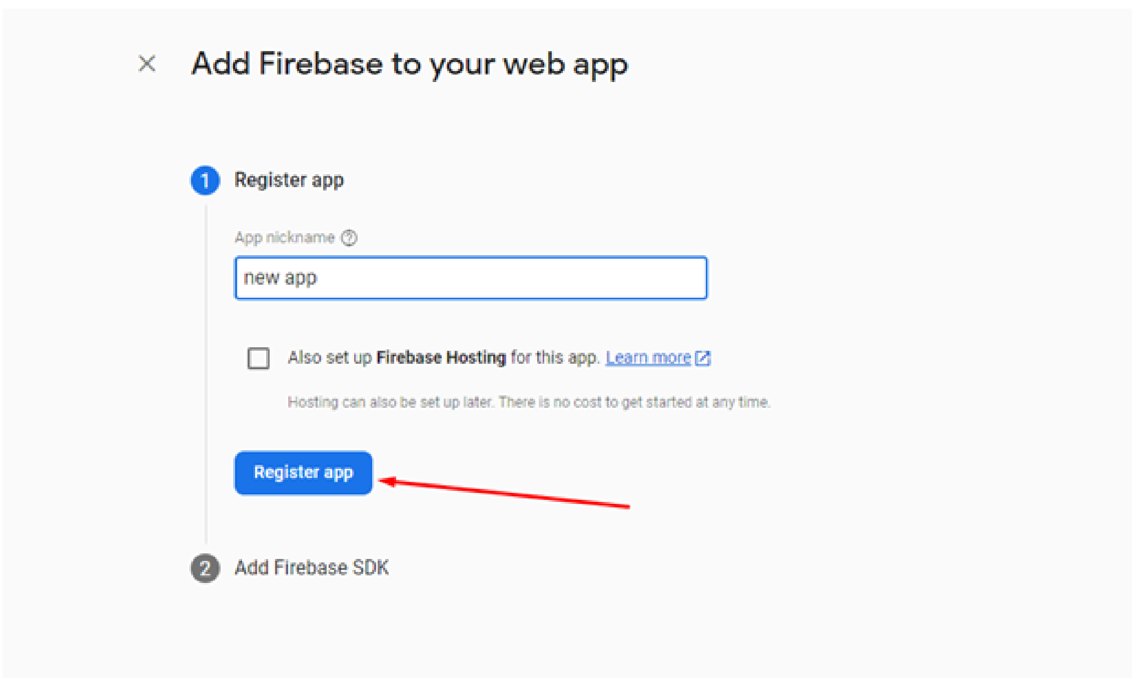


Figure: (22e) Inserting app name

- Then just click on **Continue to the console**

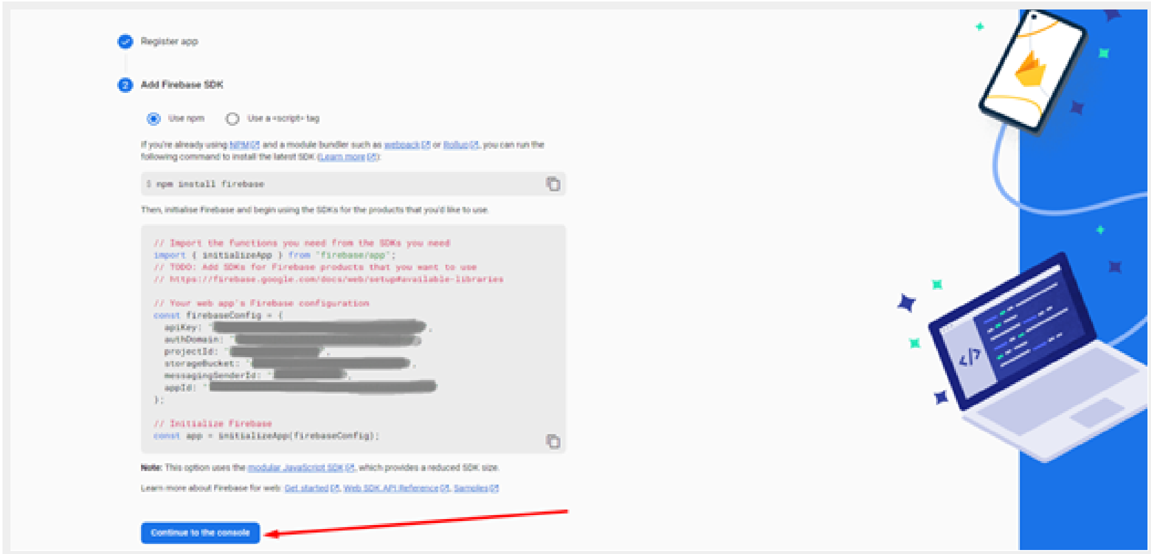


Figure: (22f) Clicking console button

- Create a **Real time Database** by following steps given bellow.

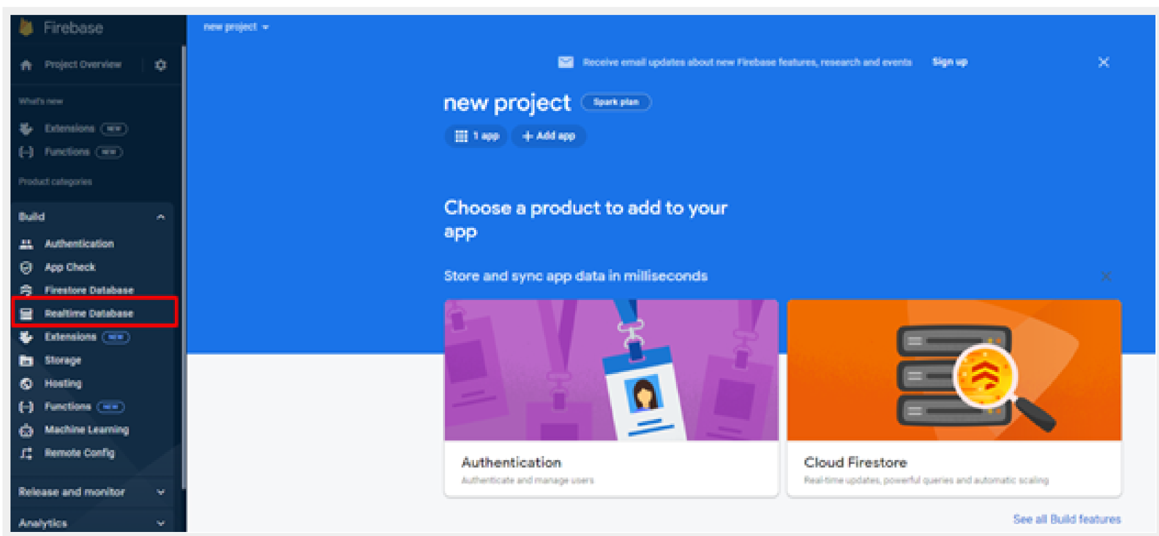


Figure: (22g) Creating real time database (i)

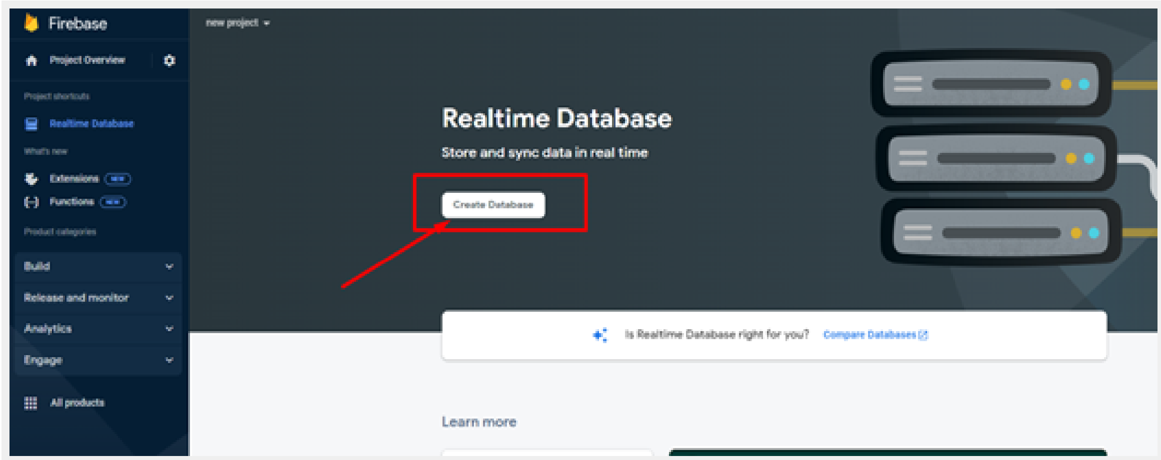


Figure: (22h) Creating real time database (ii)

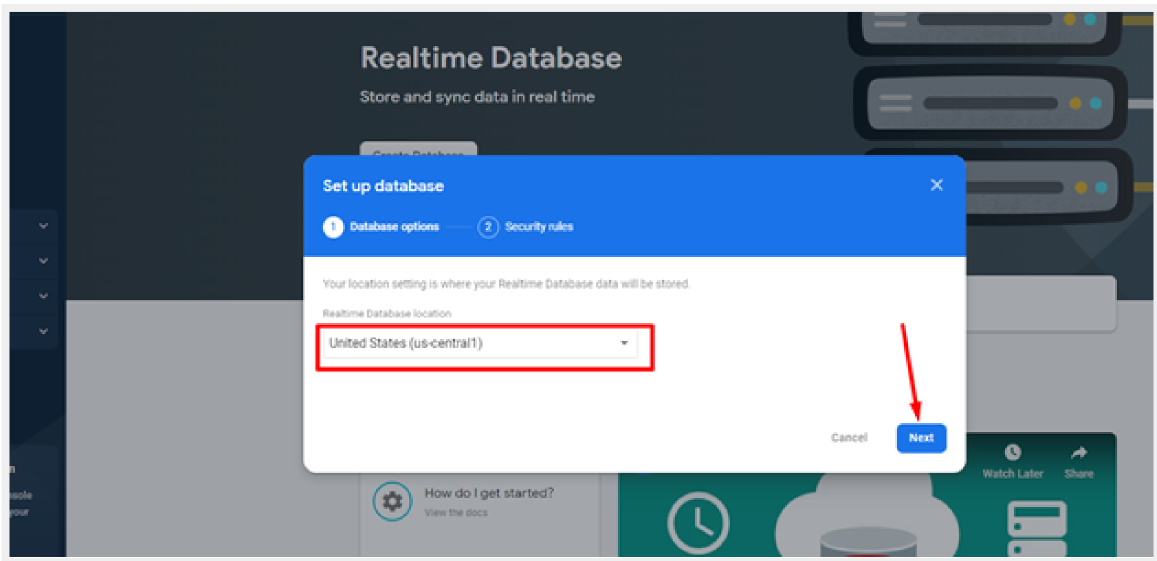


Figure: (22i) Creating a real-time database (iii)

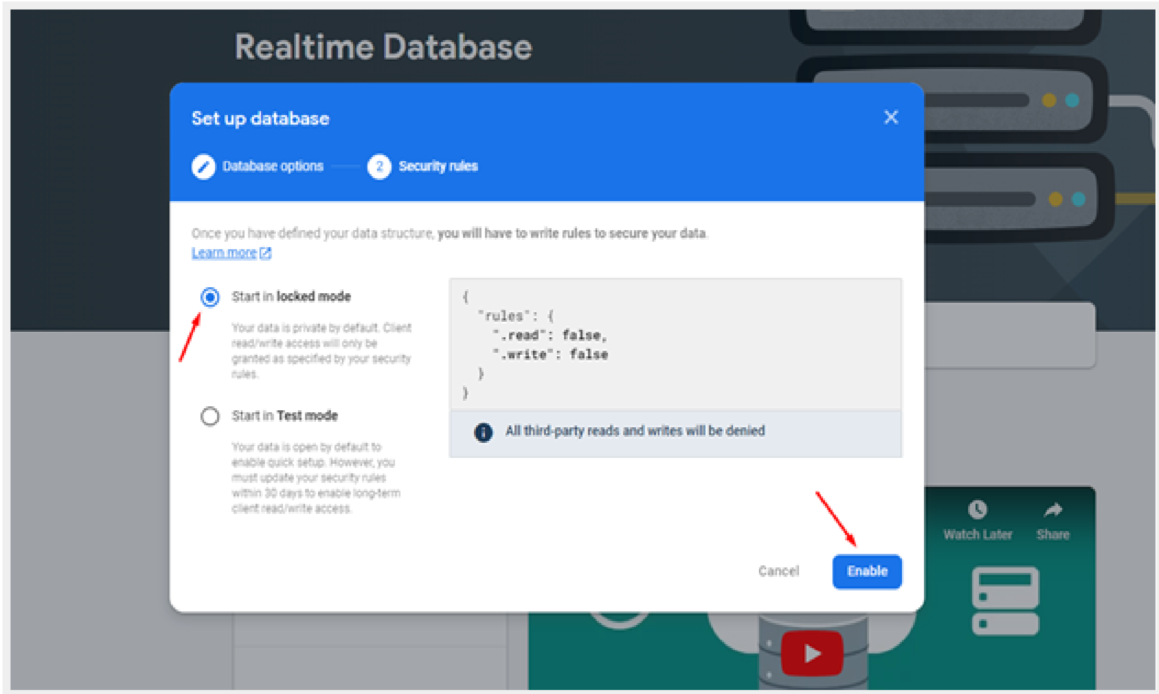


Figure: (22j) Creating real time database (iv)

- Edit Rules of Real-time Database and make ‘read’ & ‘write’ true

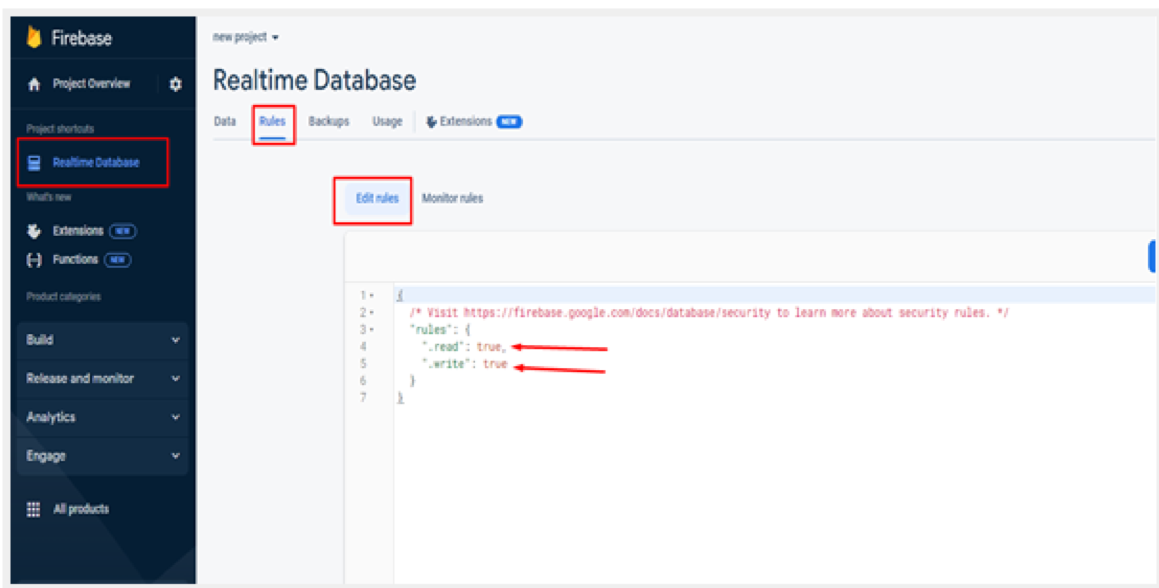


Figure: (22k) Creating real time database (v)

- Now go to **project settings** to get API Key, Auth Domain, Database URL, Project Id, Storage Bucket, Messaging Sender Id, App Id, server key & Public Vapid Key (Key pair)

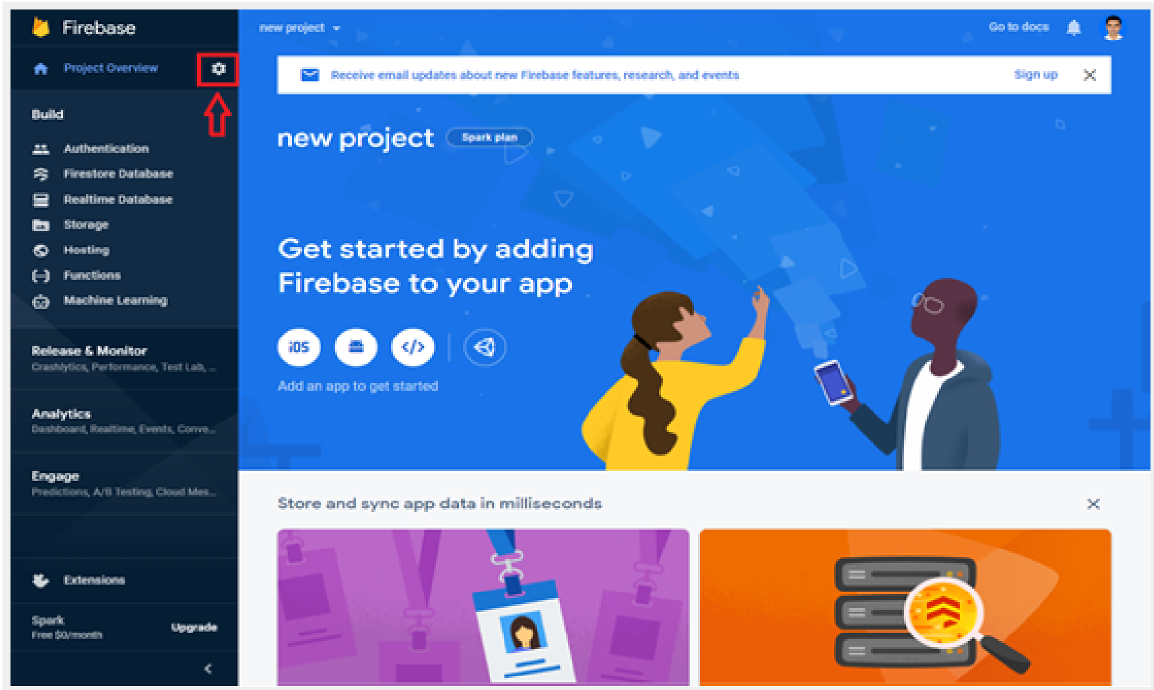


Figure: (22l) Creating real-time database (vi)

- To get 'API Key', 'Auth Domain', 'Database URL', 'Project Id', 'Storage Bucket', 'Messaging Sender Id', 'App Id' click on **General** option & select **Config** option of 'SDK setup & configuration'.

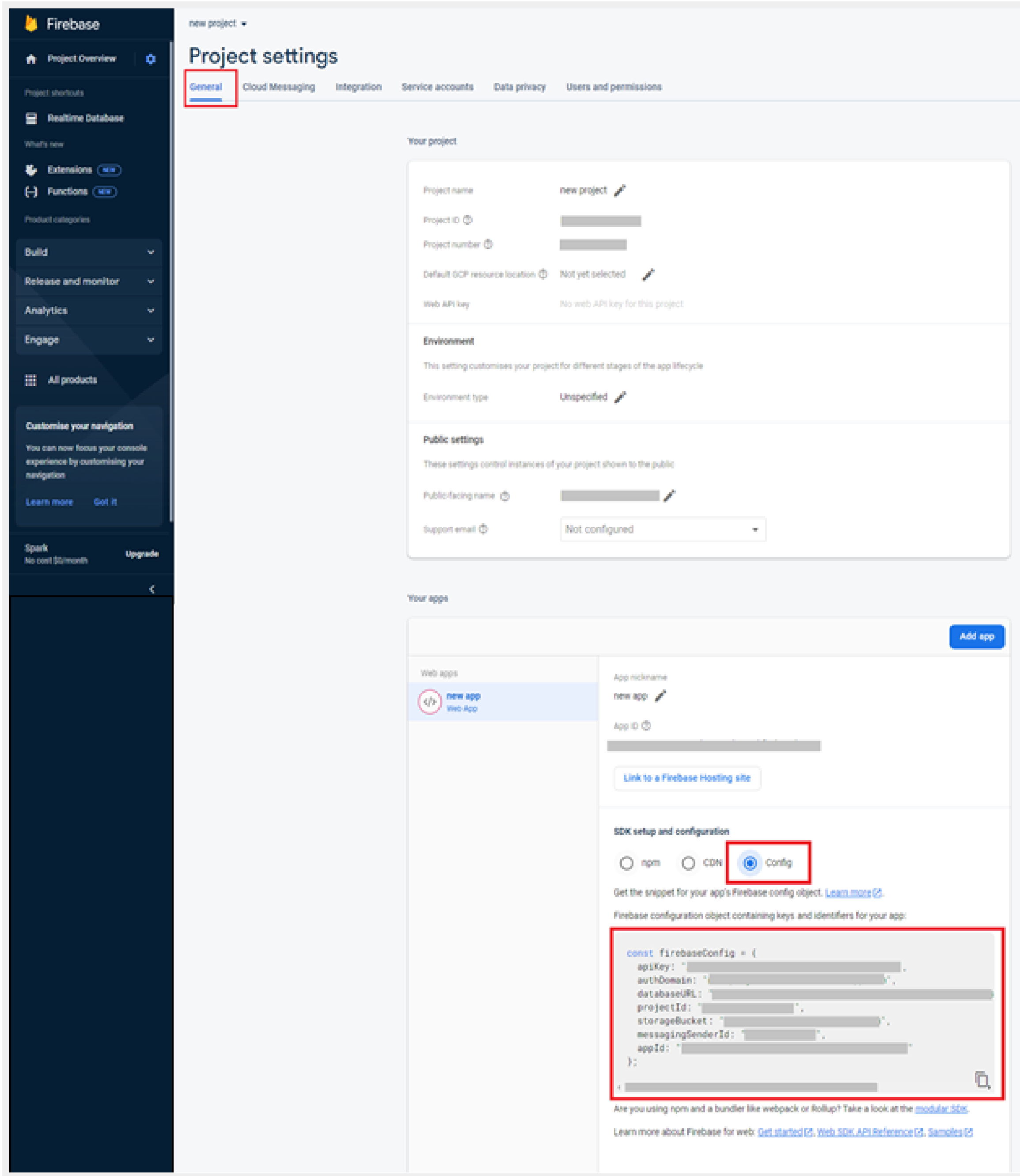


Figure: (22m) Setting the project

- To get ‘server key’ & ‘Public Vapid Key’ click on **Cloud Messaging** option. Here ‘Server Key’ is the ‘FCM SERVER KEY’ & ‘Key pair’ is the ‘Public Vapid Key’. You need to ‘generate Key pair’ to get ‘Public Vapid Key’.

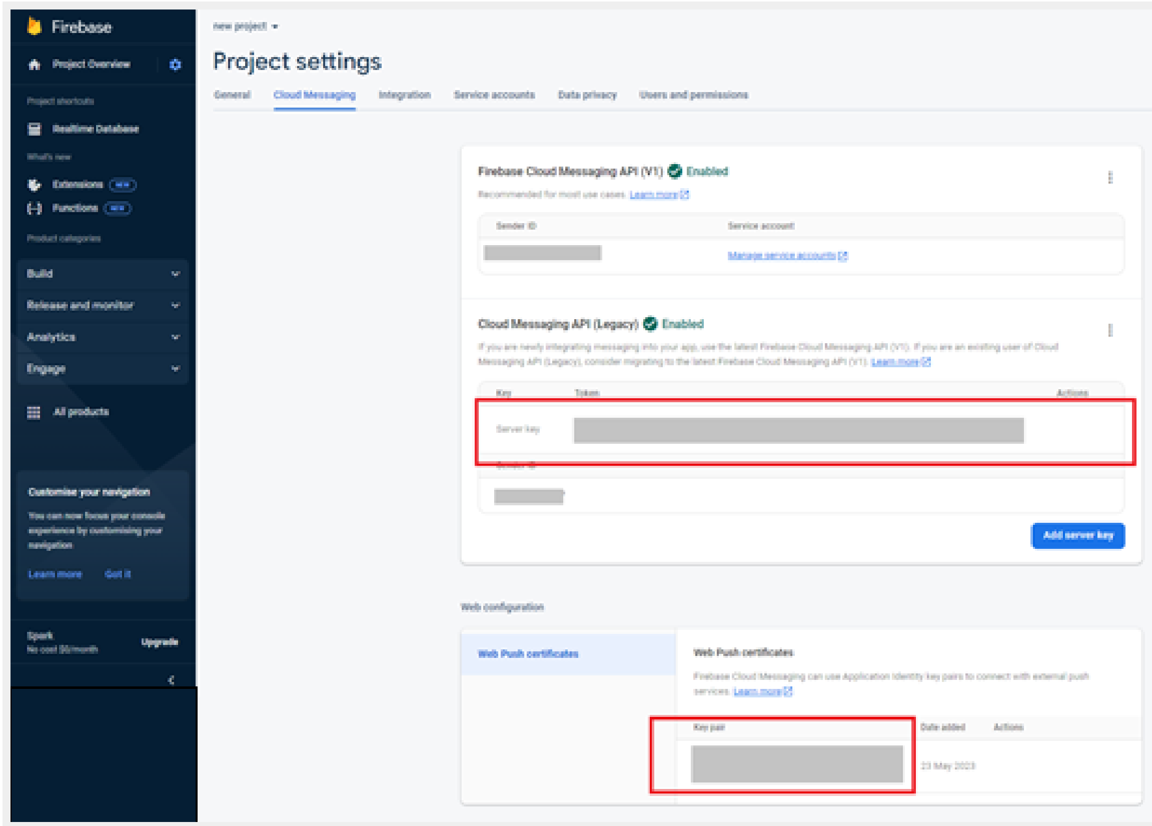


Figure: (22n) Setting the project (ii)

**Note: You need to make sure that the 'firebase-messaging-sw.js' file (we provided) is in your root directory & edit the file to configure with your actual data.

23. How does the admin set a minimum amount for withdraw requests?

Answer:

Follow the below instruction:

- Go to **Settings** > **Freelancer Payment**
- Here you can find a form for the **minimum amount for withdraw request**
- Insert the **minimum amount**
- Click on the **Update** button

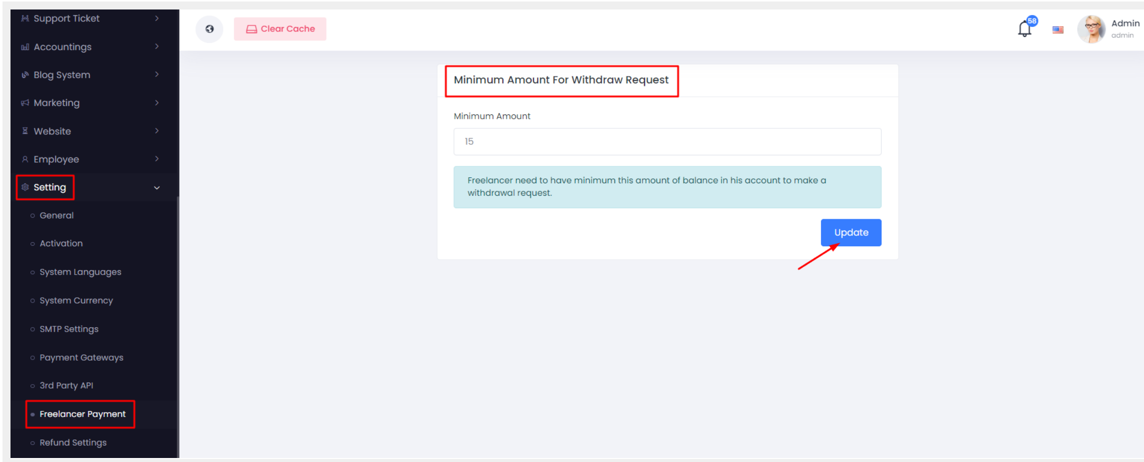


Figure (23a): Admin set a minimum amount for withdraw request

24. How does the admin confirm or reject the verification request of the client?

Answer:

For the admin to confirm or reject the verification request of the client the user needs to do the following:

- **Login** as an **admin**.
- Go to the **Verification Requests** menu.
- Click on the **view details** action.
- Then you can find **verification details**, and the admin will see two buttons
    - By clicking the **'Accept'** button the admin accepts the request of the user.
    - By clicking the **'Reject'** button the admin rejects the request of the user.

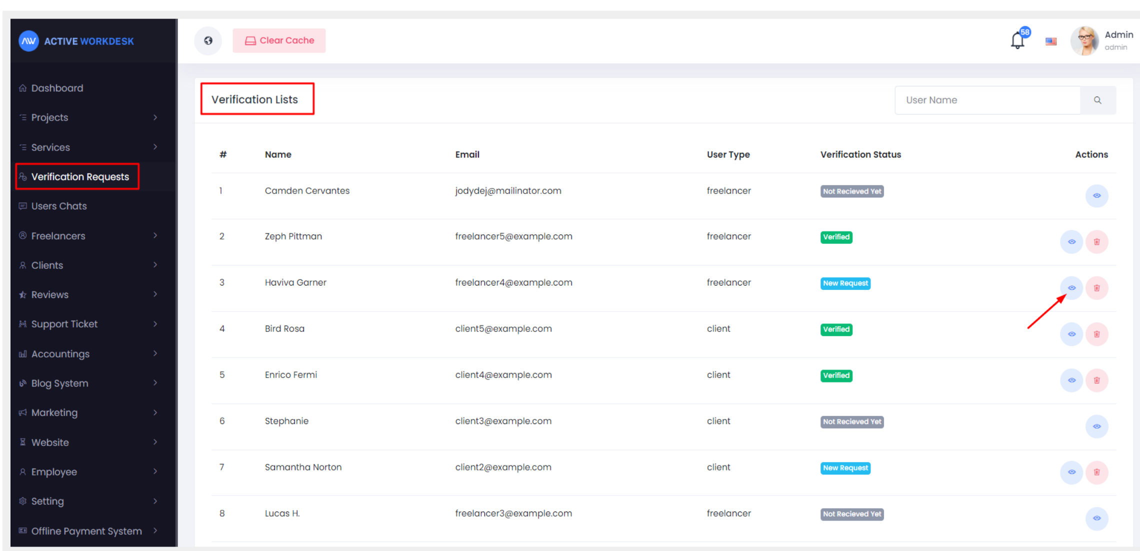


Figure (24a): Verification Request List

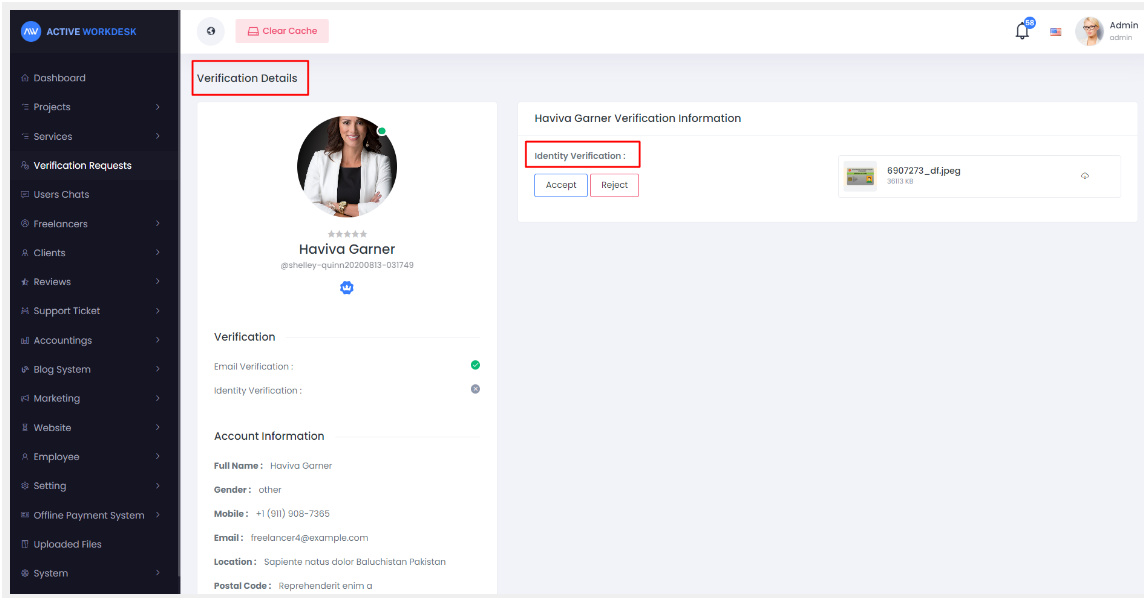


Figure (24b): Accept or reject verification request

25. How to view the client-freelancer conversation as an admin?

Answer:

For an admin to view the client-freelancer conversation as admin he needs to do the following procedure:

- Firstly, **log in** as an **admin**.
- Then Go to the **User Chat** Menu visible at the left sidebar of the admin dashboard.
- Then click on the **edit action** of any client-freelancer row available at the options column.

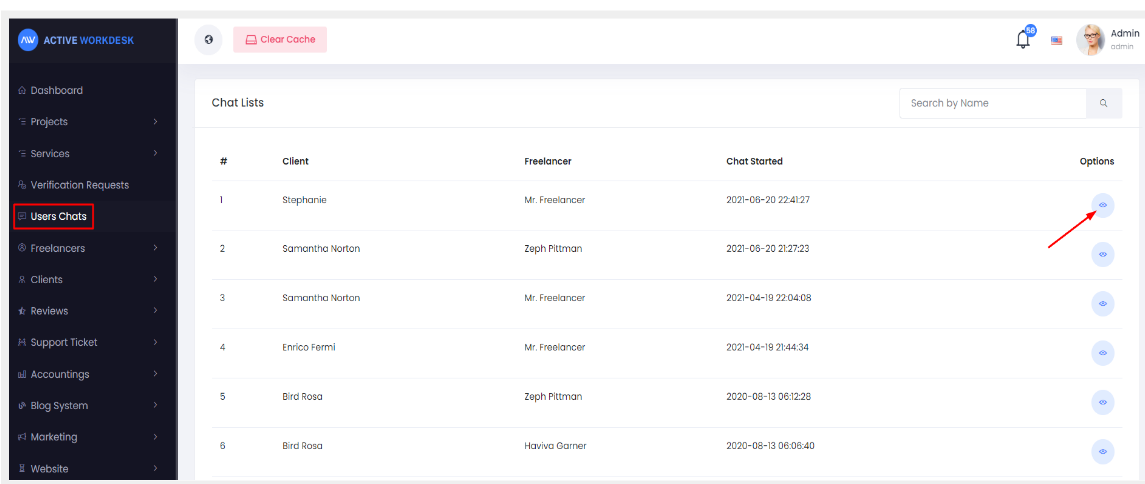


Figure (25a): User chat menu

- And finally, He will be able to **see all the conversations** that happened and are happening between the client and freelancer.

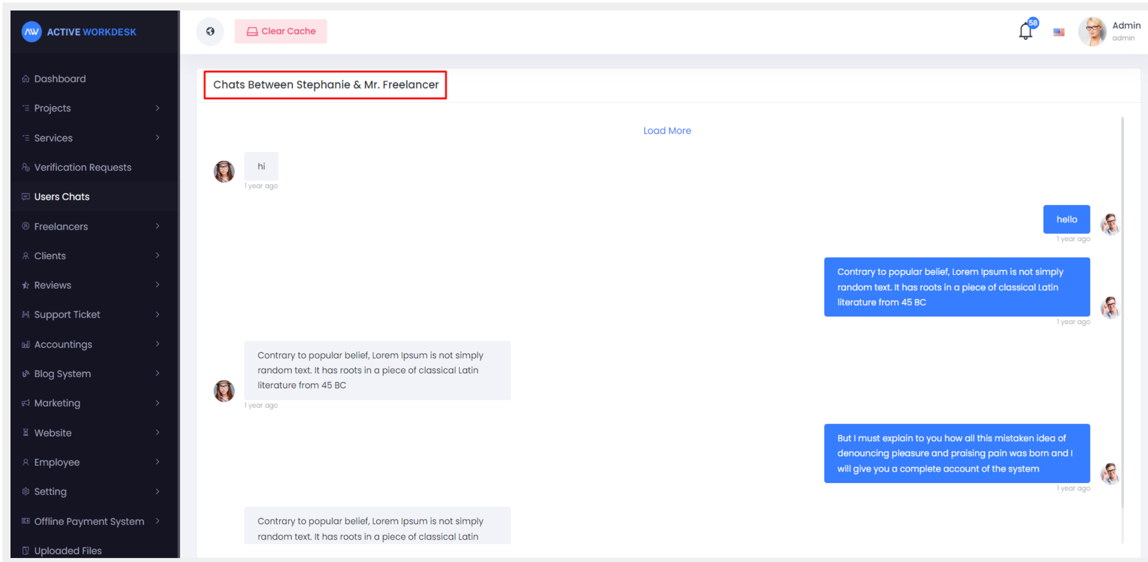


Figure (25b): Conversation between client and freelancer

26. How does the admin configure payment gateways?

Answer:

For an admin to configure the payment gateways he needs to do the following:

Seven types of payment gateway configurations are available there. To configure them follow the steps:

- **Log in** to the **admin** panel.
- From the navigation, go to **settings** > **Payment Gateways**.
- **Switch on** by clicking the switch of the methods which you want to **activate**.
- Insert necessary Information of the methods.
    - **Paypal** – Insert the paypal **client ID**, **Client secret** and switched off the sandbox mode(which for demo transactions). Then click on **Update**.
    - **Stripe** – Insert the **stripe key**, **stripe secret** which you will get from your stripe account and switched off the sandbox mode(which for demo transactions). Then click on **Update**.
    - **Instamojo** – Insert the **instamojo api key, instamojo auth token** which you will get from your instamojo account and switched off the sandbox mode(which for demo transactions). Then click on **Update**.

- **Flutterwave** – Insert the **public key**, **Secret Key** which you will get from your Flutterwave account settings, **Secret Hash,** and **Currency Code**. Then click on Then click on **Update**.
- **Paystack** – Insert the **public key**, **secret key**, and merchant email which you will get from your Paystack account. Then click on **Update**.
- **Paytm** – Insert the **environment**, **merchant ID**, **merchant key**, **merchant website**, **Paytm channel**, and **industry type** which you will get from your paystack account. Then click on **Update**.
- **SSlCommerz** – Insert the **SSLCZ store ID**, **SSLCZ** store **password** and switch off the sandbox mode. Then click on **Update**.
- **MERCADOPAGO** – Insert the **MERCADOPAGO KEY**, **MERCADOPAGO ACCESS,** and **MERCADOPAGO CURRENCY CODE**, which you will get from your MERCADOPAGO account. Then click on **Update**.
- **Iyzico** – **Enable** the activation switch. Insert the **Iyzico API KEY**, **Secret Key, and Currency code,** and switch off the **Iyzico Sandbox Mode.** Then click on **Update**.

***Please note that for SSLCommerz you have to set your site default currency is BDT. This method is only for Bangladesh.

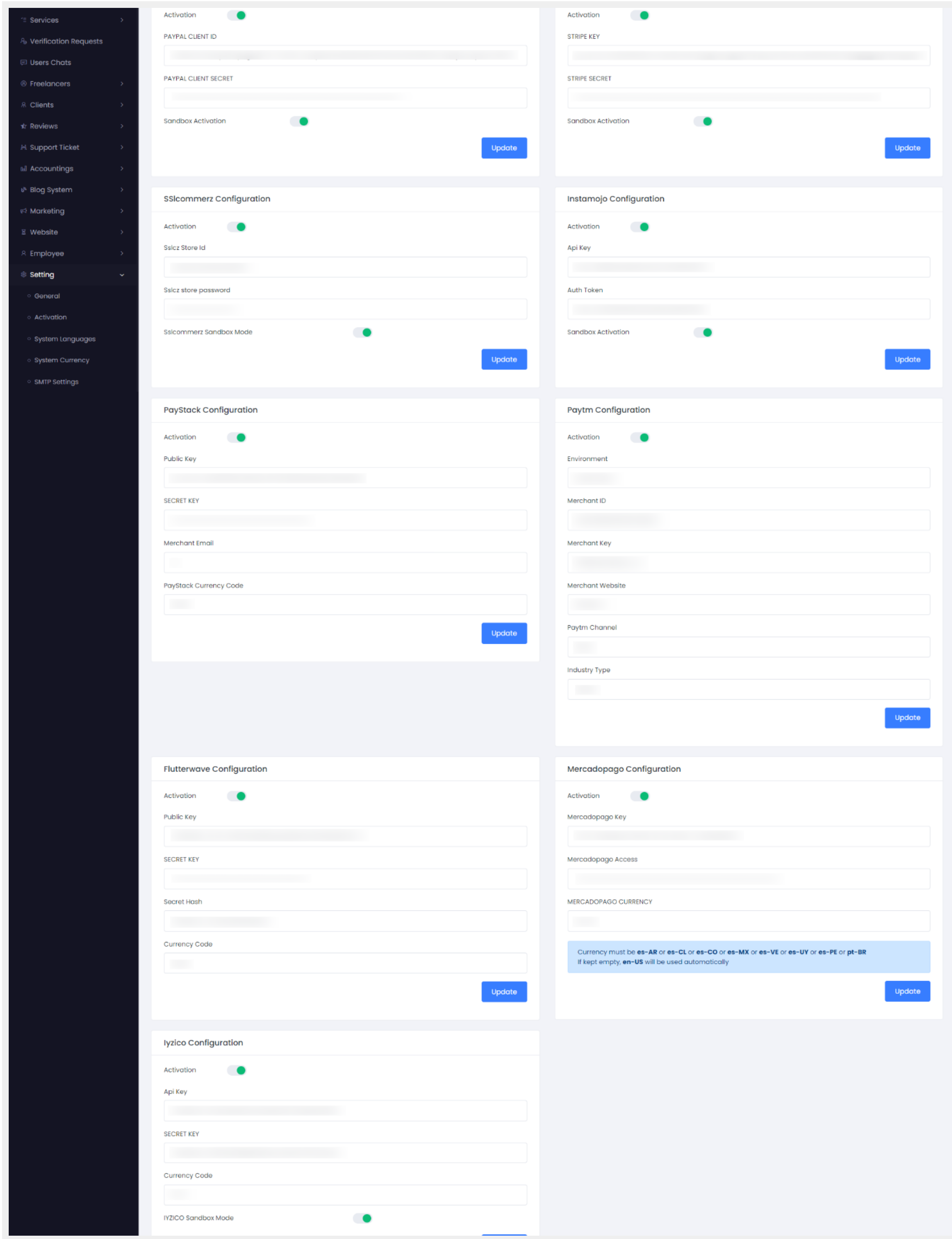


Figure (26a): Payment gateway list

27. How to create a custom page as an admin?

Answer:

For an admin to create a custom page he needs to do the following:

- Firstly, the admin needs to **log in** as an admin.
- Then go to **Website > Pages**
- And click the **Add New Page** button.
- There he will get a form where he will be able to set the detailed information about the page.
- Finally, by clicking the **Add Page** button he will be able to add the new page to his website.

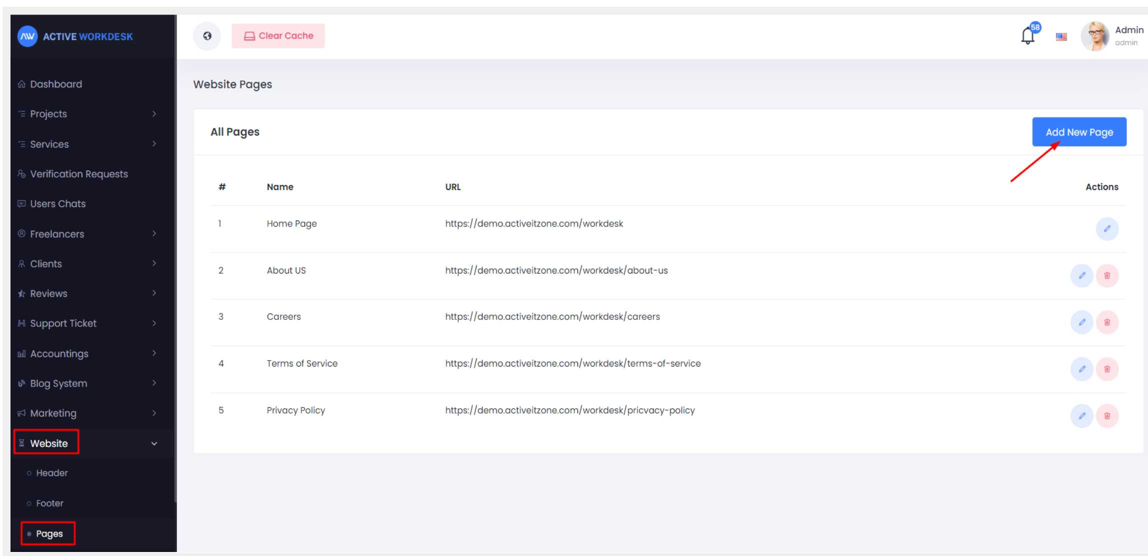


Figure (27a): Add any custom page

28. How to set up the header of the site as an admin?

Answer:

For an admin to set up the header of the site he needs to do the following:

- Firstly, he needs to **log in** to the **admin** panel.
- Then go to **Website > Header**.
- There he will be provided with two functions.
- He will be able to make the site header sticky as well he will be able to set the header logo.

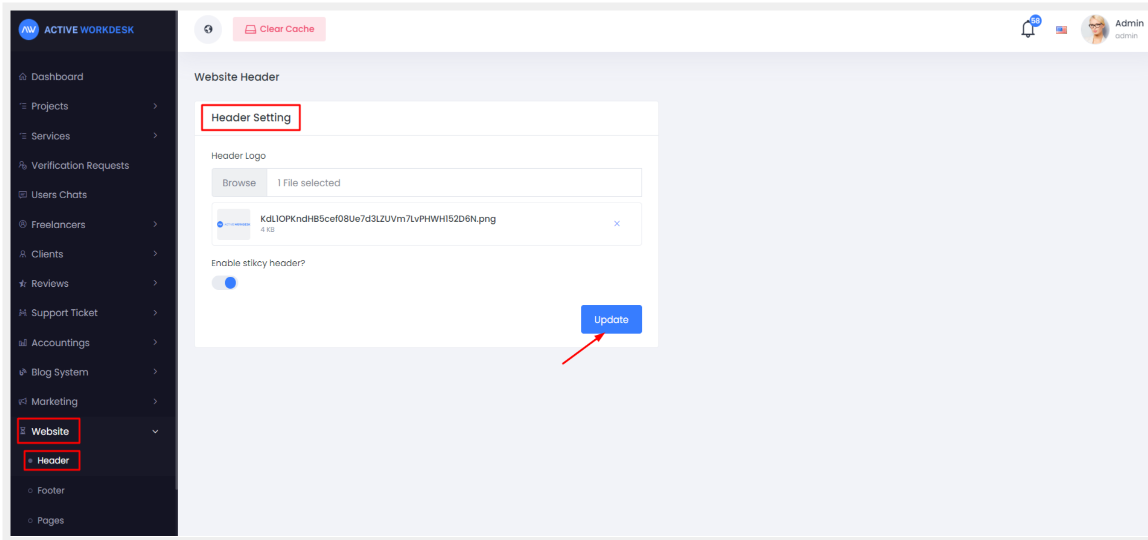


Figure (28a): Set up header setting

29. How to set up the footer of the site as an admin?

Answer:

For an admin to set up the footer of the site he needs to do the following:

- Firstly, he needs to **log in** to the **admin** panel.
- Then go to the **Website > footer**
- There he will be able to set **all the widgets** of his website.
- He will be able to set the footer widgets.
    - Insert **Footer Logo**, **Description**
- He will be able to set the **social widget**.
- He will be able to set the **Footer apps link**.
- He will be able to enable/disable the **language switcher** from the footer bottom..
- And also have the feature of setting his **copyright text**.

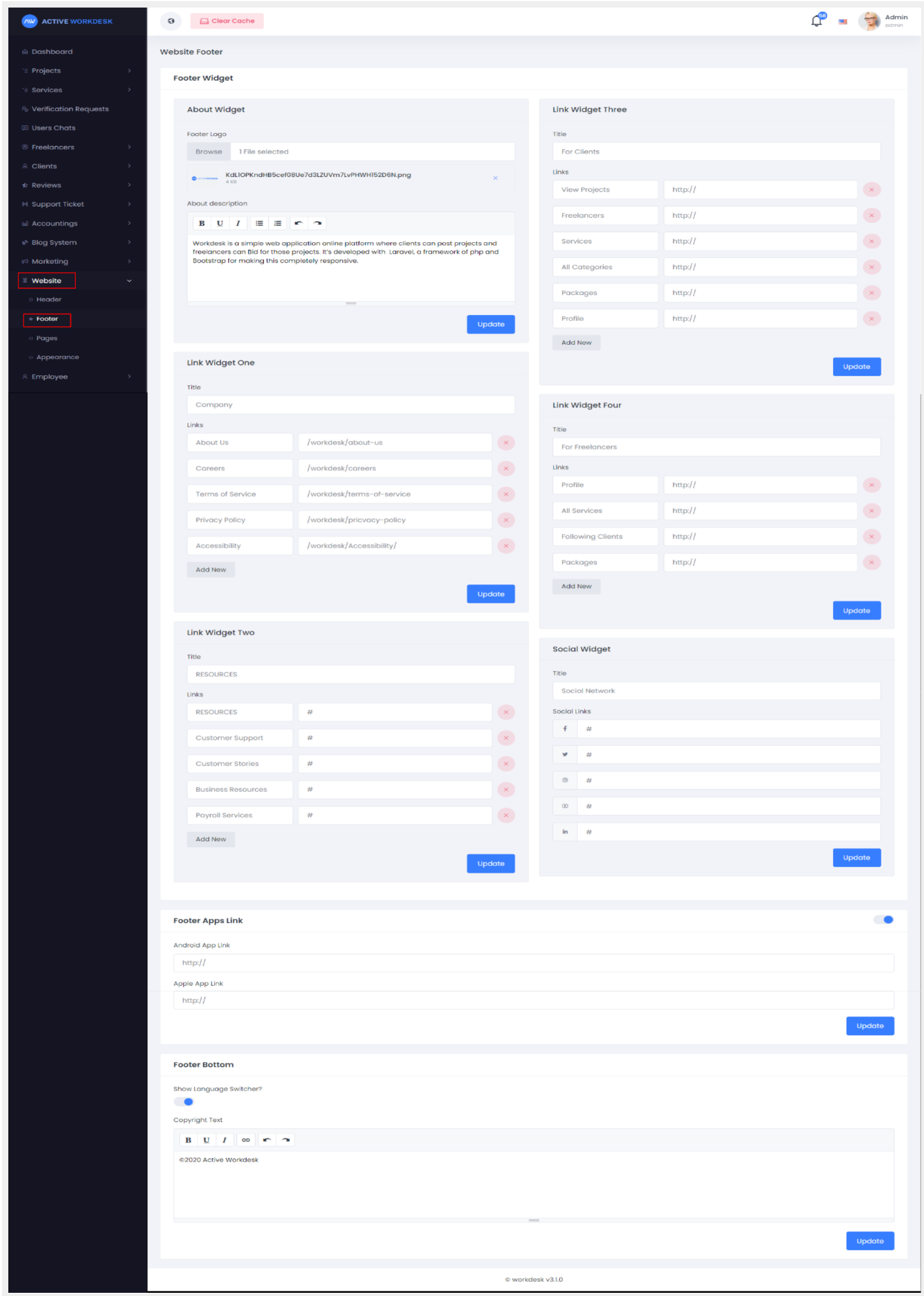


Figure (29a): Set up Footer

30. **How to set up the homepage of the site as an admin?**

Answer:

For an admin to set up the homepage of the site he needs to do the following:

- Firstly, he needs to **log in** to the **admin** panel.
- Then go to **Website > Pages**
- Then click on the **Homepage** action button
- Fill up the **Slider section**
    - At the right side **enable/disable** the switch
    - Insert **Title**, **Subtitle**, and **Slider images** (Recommended size 1920x1080)
    - Click on **Update**
- Fill up **client section**
    - At the right side **enable/disable** the switch
    - Insert **clients logos** (Recommended size 190x80)
    - Click on **Update**
- Fill up **How it works section**
    - At the right side **enable/disable** the switch
    - Insert **Title, Subtitle**
    - For step 1 insert **image** and fill up about **description**
    - For step 2 **insert image** and fill up **about description**
    - For step 3 insert **image** and fill up about **description**
    - Click on **Update**
- Fill up **Latest Project Section**
    - At the right side **enable/disable** the switch
    - Insert **Title**, **Subtitle**
    - Click on **Update**
- Fill up **Featured Category Section**
    - At the right side **enable/disable** the switch
    - Insert **Title**, **Subtitle**, select **categories**, upload **left banner** and **right banner**
    - Click on **Update**
- Fill up **Services Section**
    - At the right side **enable/disable** the switch
    - Insert **Title**, **Subtitle**, **max service show**
    - Click on **Update**
- Fill up **CTA Section**

- Insert **Title** for **client**, **Subtitle** for **client**, **Title** for **Freelancer**, **Subtitle** for **Freelancer** and upload **banner**
    - Click on **Update**
- Fill up **Blog Section**
    - At the right side **enable/disable** the switch
    - Insert **Title**, **Subtitle**, **Max Blog Show**
    - Click on **Update**
- Fill up **Seo Fields**
    - Insert **Meta Title**, **Meta description**, **Keywords**, **Meta Image**
    - Click on **Update**

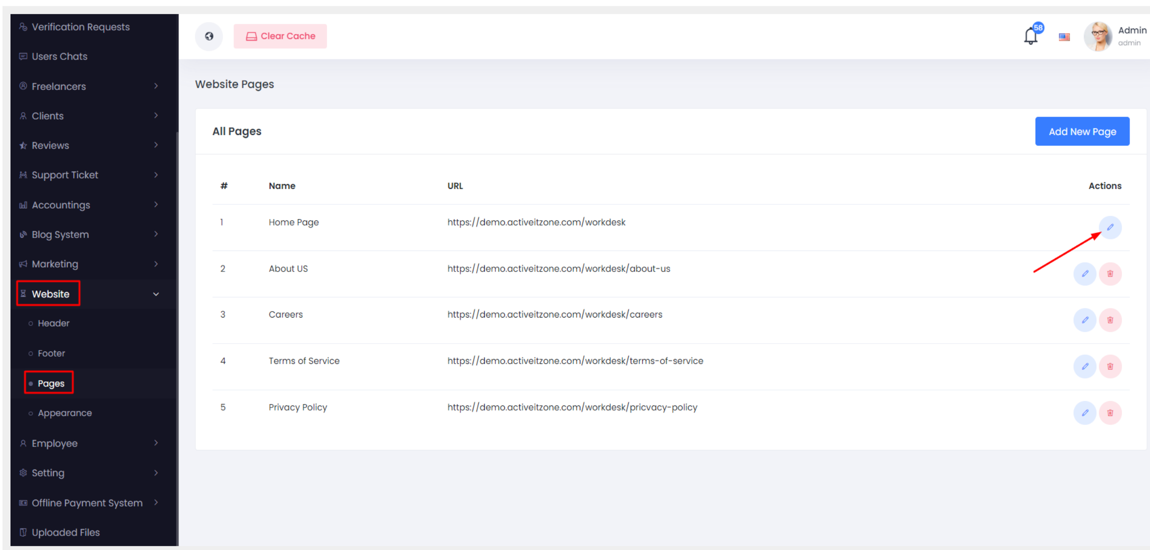


Figure (30a): Website pages list and Homepage

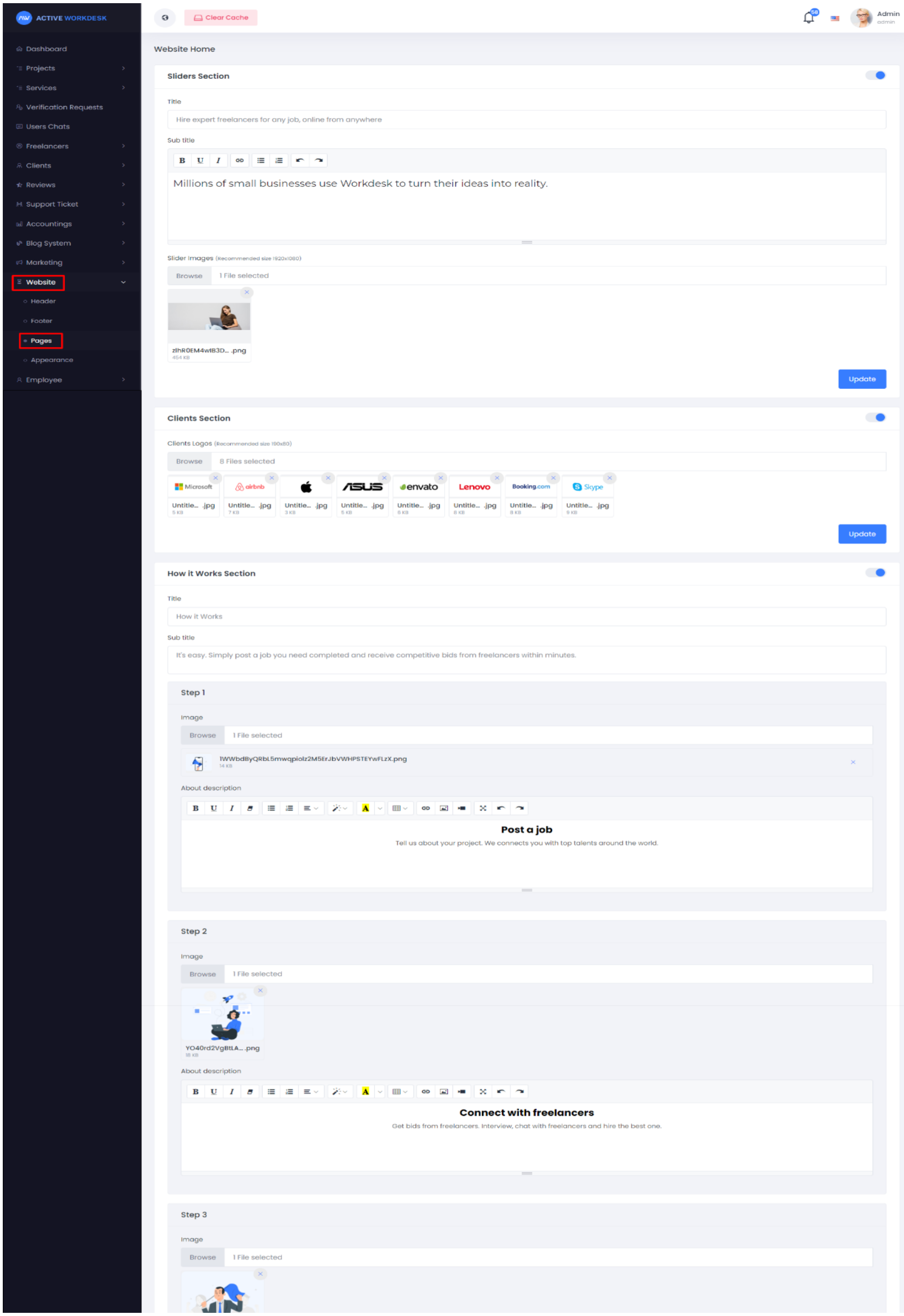


Figure (30b): Set up the Homepage

31. How does an admin view all services created by the freelancers?

Answer:

Admin can view all the services created by the freelancers. The admin needs to do the following:

- Firstly, he needs to **log in** to the **admin** panel.
- Now, Go to **Services > All services**
- Here you can find all services
- By clicking on any **service title** admin can see all his/her services and by clicking on **service owner** admin can see any freelancer's profile.

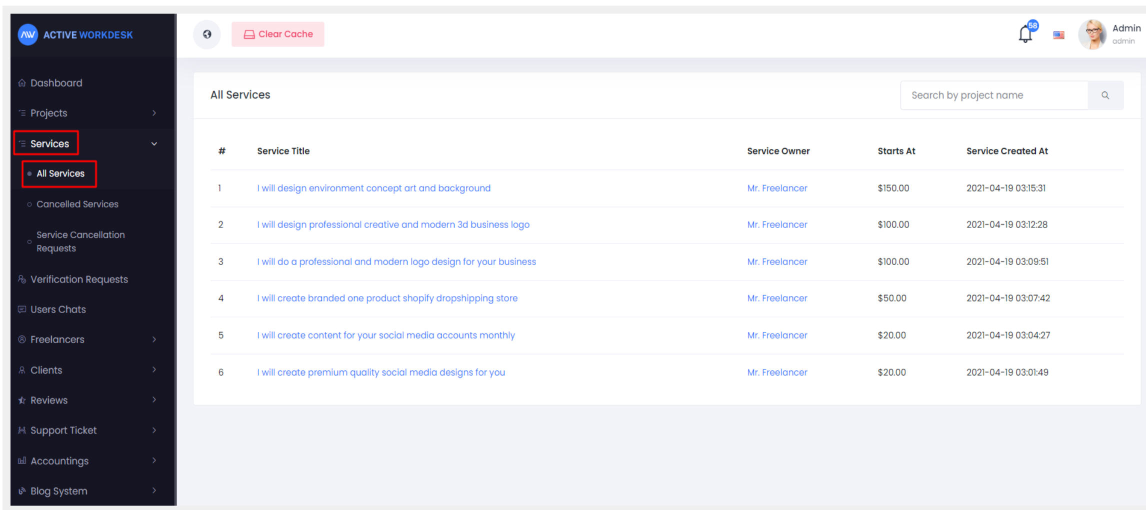


Figure (31a): Admin view all services of freelancers

32. How does an admin view all the service payments that happened between clients and freelancers?

Answer:

In order for an admin to view all the payment that has happened between the clients and the freelancers he/she needs to do the following:

- **Log in** as **admin**
- After logging in the admin needs to go to **Accounting > Service Payments**

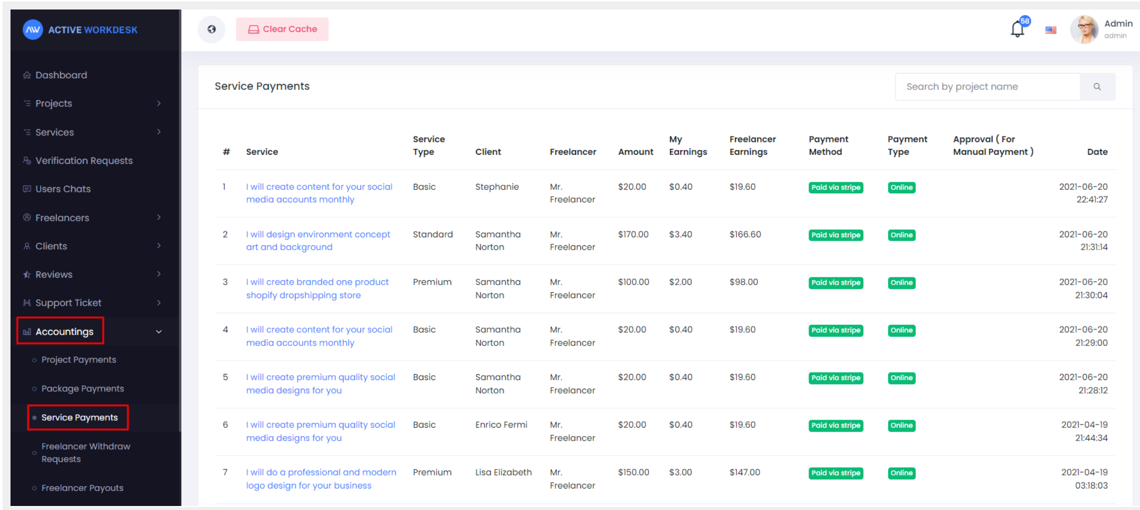


Figure (32a): Admin view all service payments

<u>This portion deals with the client-side login</u>

33. How does the user get registered as a client?

Answer:

The registration system is very simple and easy. To get registered as a client, a user needs to follow the steps mentioned below:

- Go to the **homepage**.
- At the top right corner of the page there is a Log In button and a Get Started button.
  - If you are already **registered** into the **system** then **Log in** with your credentials.
  - Else Click the **Get Started** button and **register** your account.
- To register, user should provide proper information inside the form.
- Choose **As a Client** radio button.
- And then Click **Join With Us**

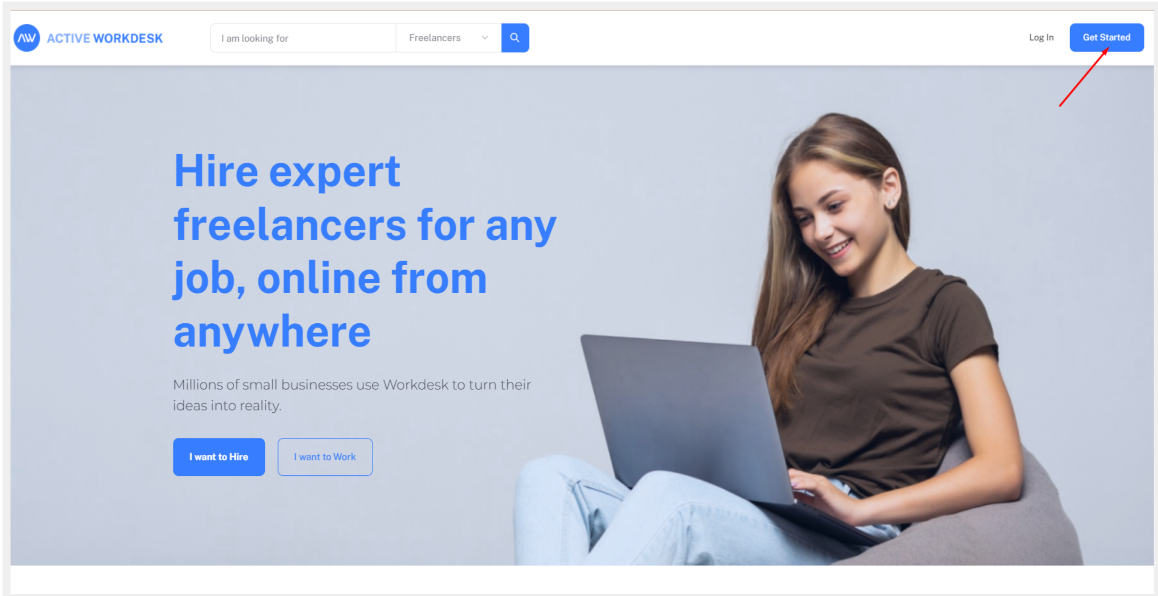


Figure (33a): Get started button

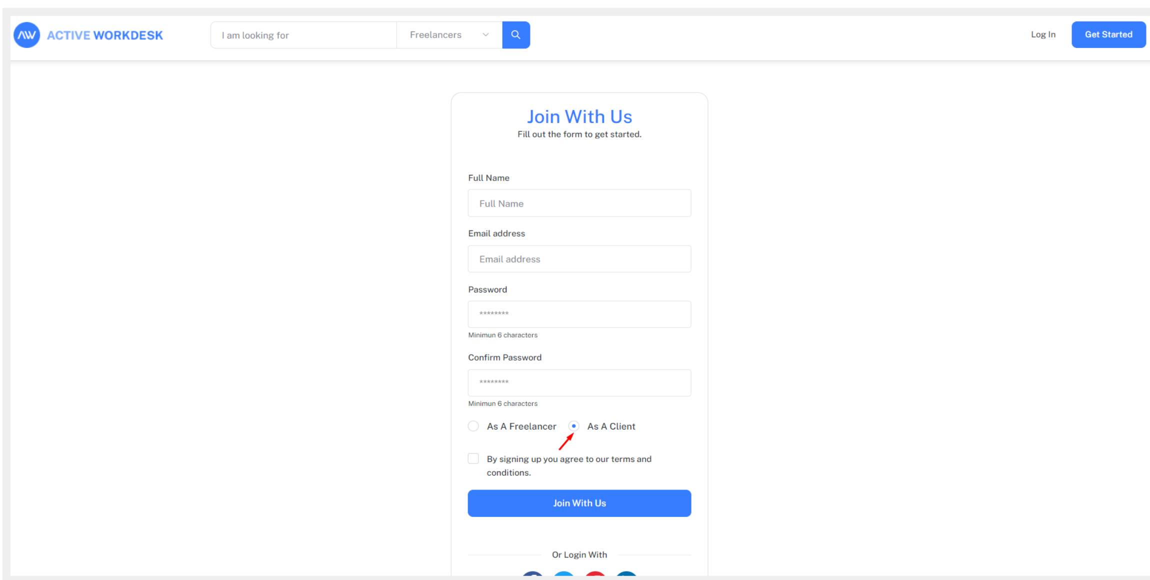


Figure (33b): Registration form

34. Who can create a project and how many types of projects?

Answer:

The Client can only create the projects. The Client can create a project in two ways.

- Open projects for any freelancer
- Private project for any specific freelancer.

There are also two types of projects and they are:

- Fixed type project
- Long term project

35. How to create an open project?

Answer:

To create a new open project a client needs to follow the below steps:

- **Login** to the **client** panel
- Go to **Project > All Projects**

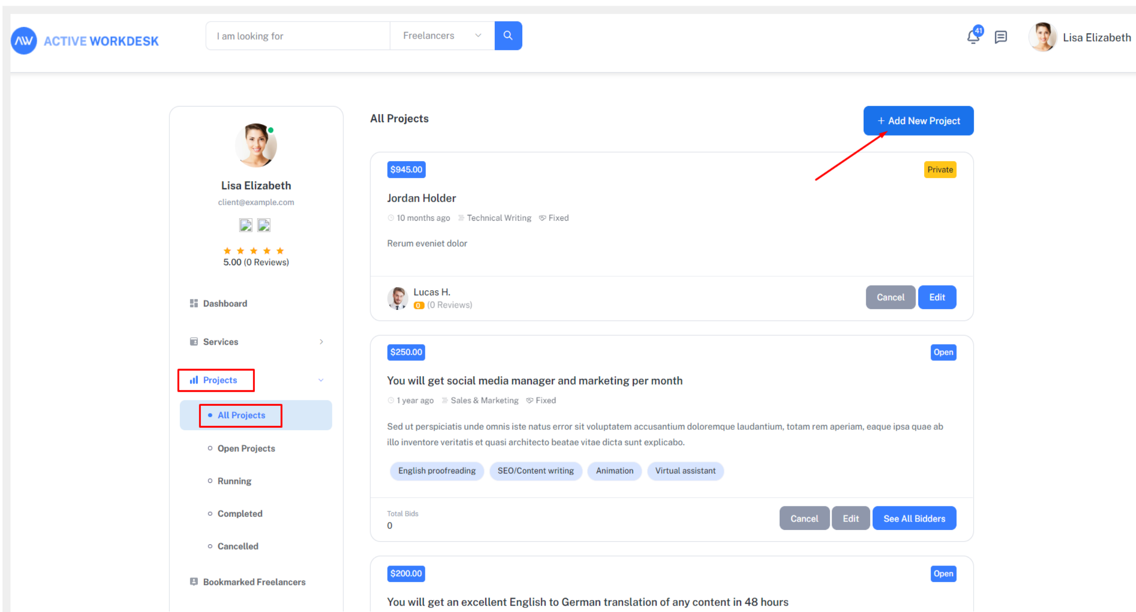


Figure (35a): Add new project from client

- The client will be able to create an open project provided that he has not exceeded the limit of creating open projects mentioned by the package that he purchased.
- In there, the client will find the **Add New Project** button at the top right side of that page and click on it.
- Then the client will get a form to fill up.
- The client needs to fill up that form with **project title**, **type**, **budget**, **category**, **description**, **skills**, **project details**, **attached** any **file** and click on the **Post Project** button.

36. How to hire a freelancer for an open project?

Answer:

To hire a freelancer for an open project the steps below should be followed:

- Firstly, the user needs to **log in** as a **client**.
- The client will be able to hire freelancers for an open project provided that he has not exceeded the limit of hiring freelancers for private projects mentioned in the terms of the package that he purchased.
- Then go to **Projects** > **Open projects**.

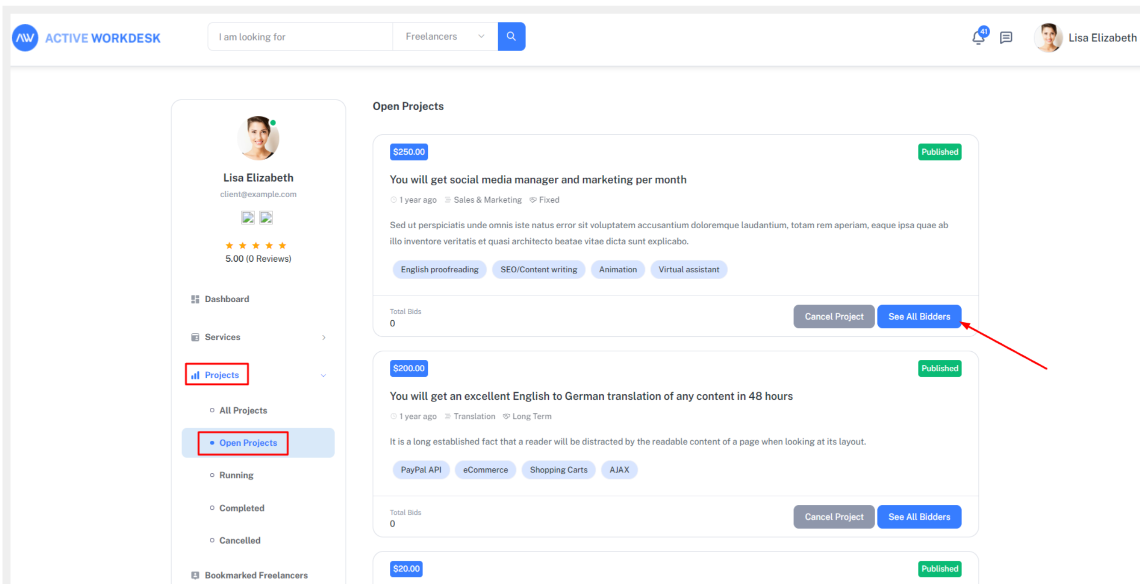


Figure (36a): Open project list and all bidders

- There the user has to click the **See All Bidders** button of the particular project.
- Then he will be able to see **all the bidders** that bidded for that particular project.

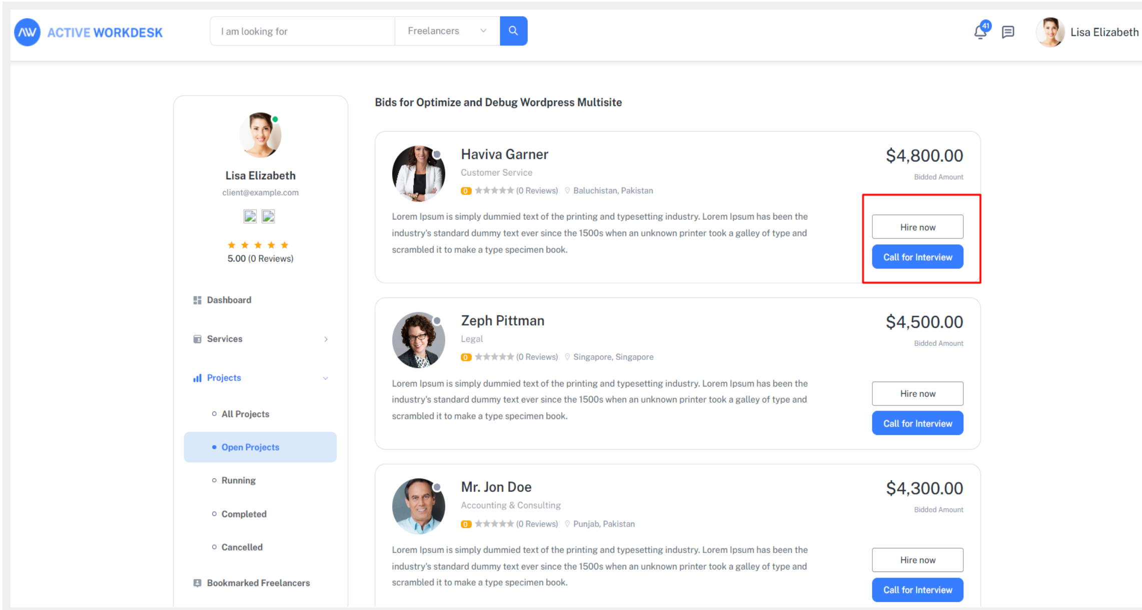


Figure (36b): Bidded all projects

- Then he will be able to **chat** by clicking **interview**.

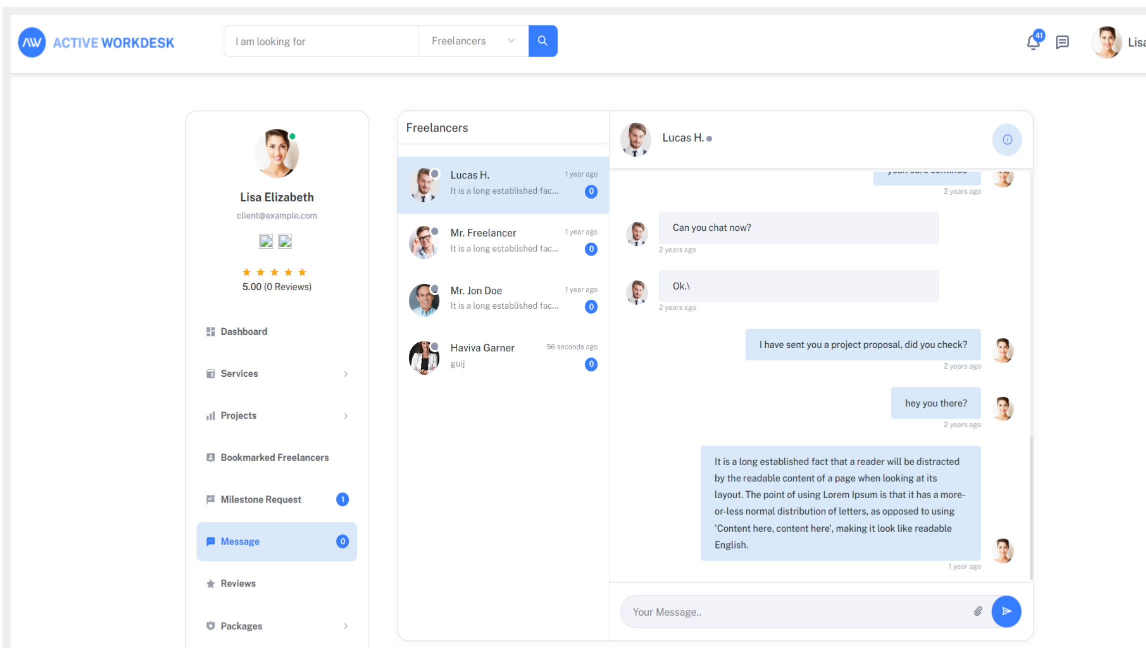


Figure (36c): chat with freelancer

- After chatting and interviewing the client can **hire** the freelancer of his choice for his project.

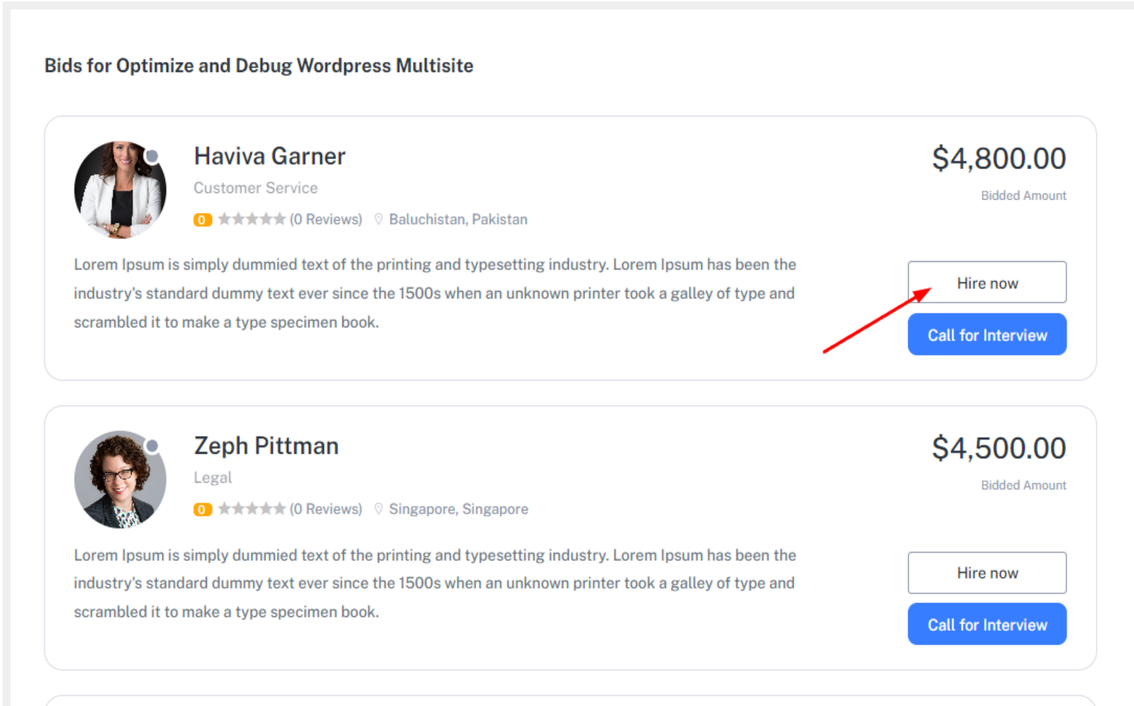


Figure (36d): To hire any freelancer click the hire now button

37. How to hire a freelancer for a private project?

Answer:

To hire a freelancer for a private project the steps mentioned below should be followed:

- **Log in** as **Client**
- Go to the **freelancer listing** page.

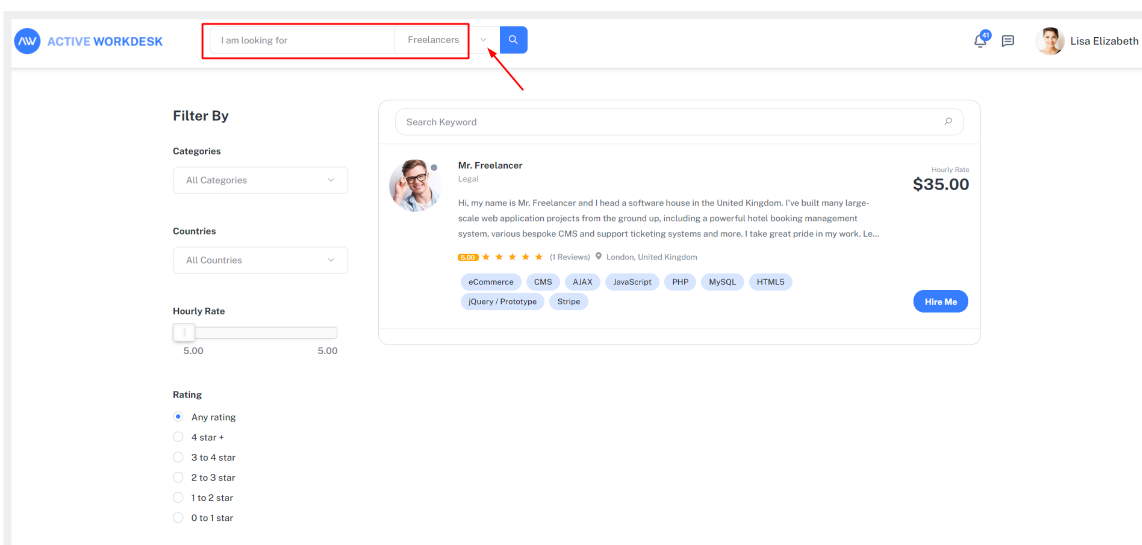


Figure (37a): Freelancer listing page

- Choose a **freelancer** who is suitable for the job and see details of the freelancer's work

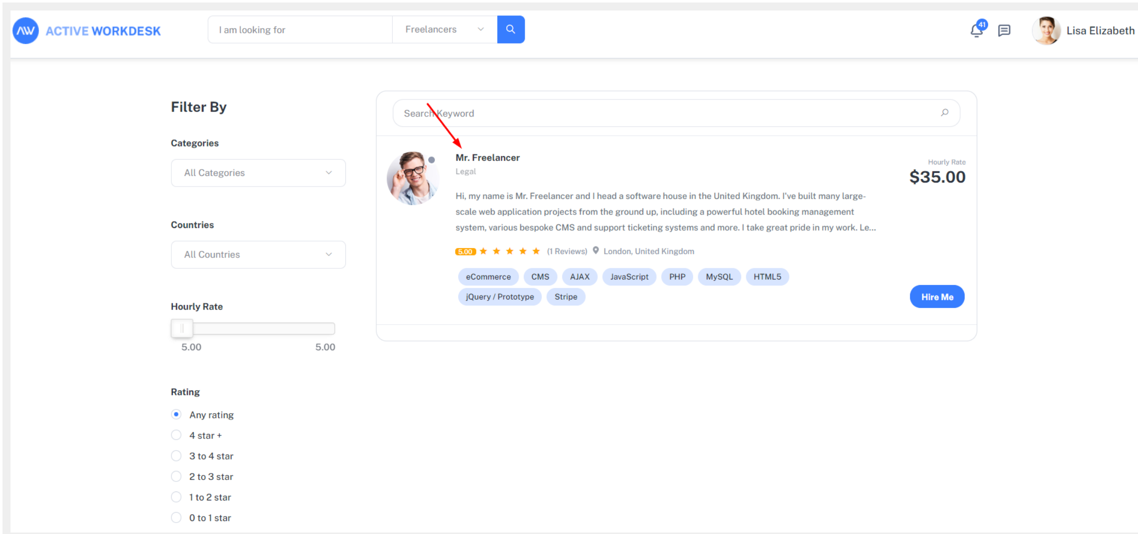


Figure (37b): Freelancer choosing

- Then click on the **Hire Me** button.

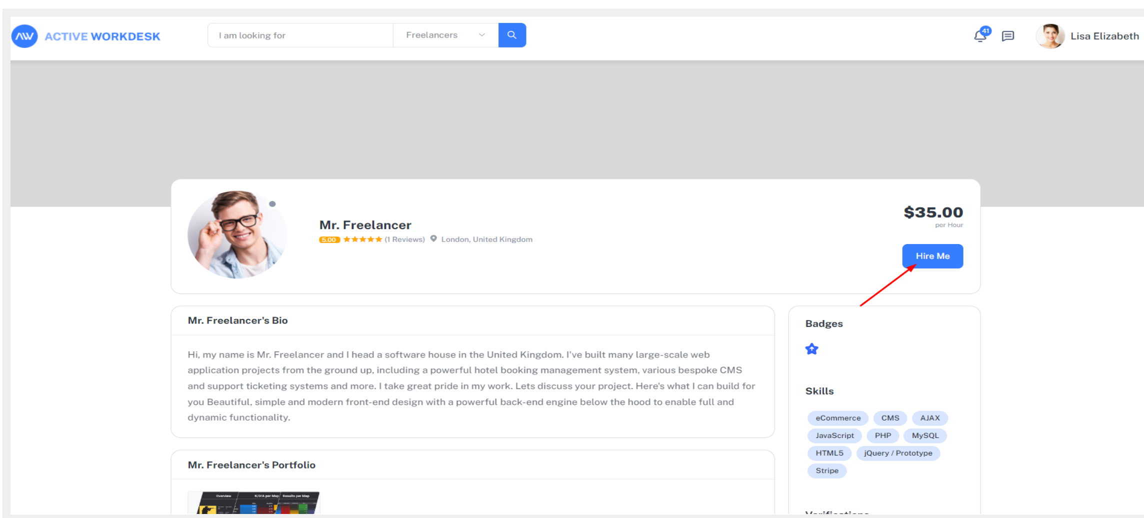


Figure (37c): Hiring Freelancer

- It'll redirect the user into another page where there will be a form. The client needs to fill out the form. And then click the **Send Invitation** button.

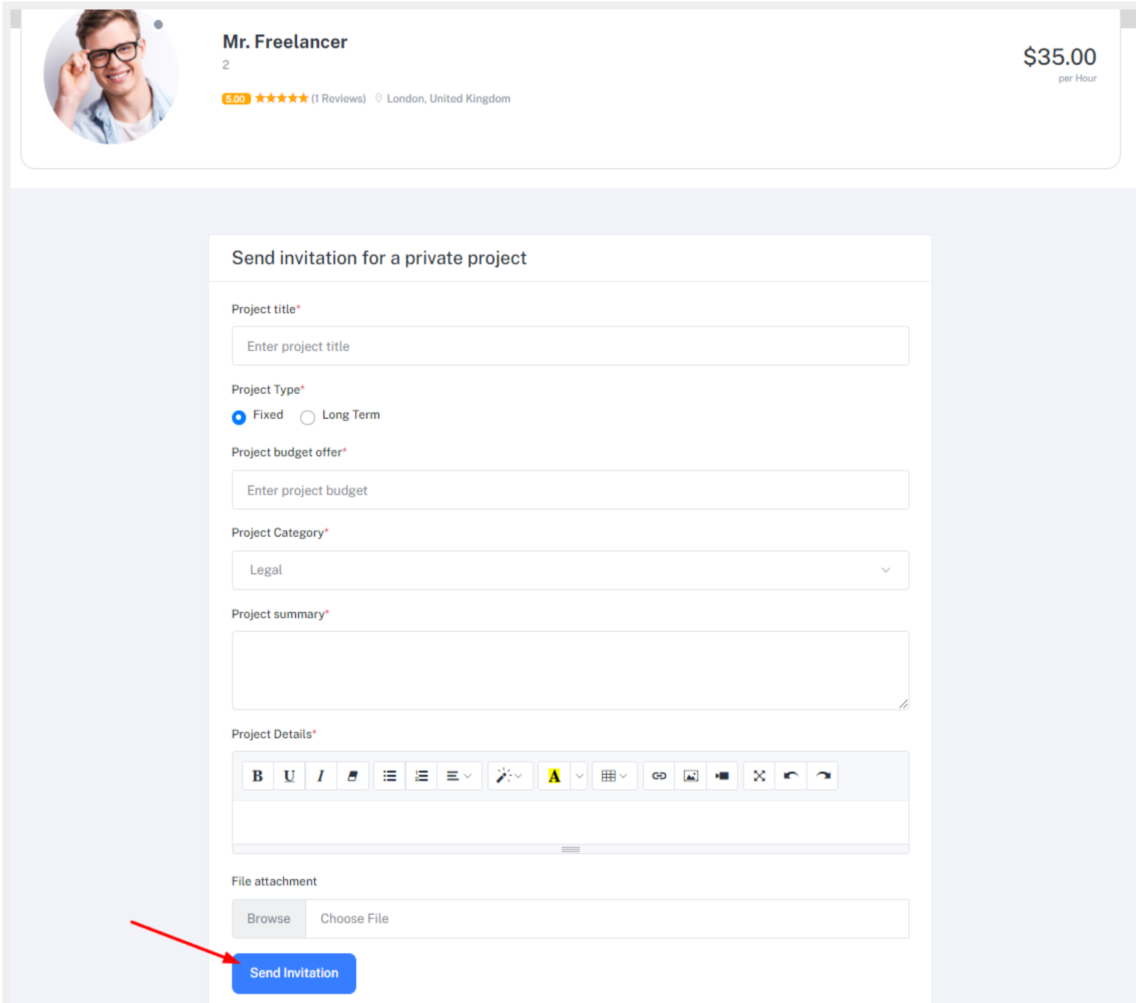


Figure (37d): Invitation send for private project

38. How to send milestone payment to freelancers?

Answer:

To send milestone payment to freelancers the steps below should be followed:

- Firstly, the user has to **log in** as a **client**.
- Then go to the **Milestone Request** menu.
- The client can see what is the message sent with the milestone request by clicking on the **view message** action
- There he will have to click the **Pay now** Button for the particular freelancer he wants to pay to.

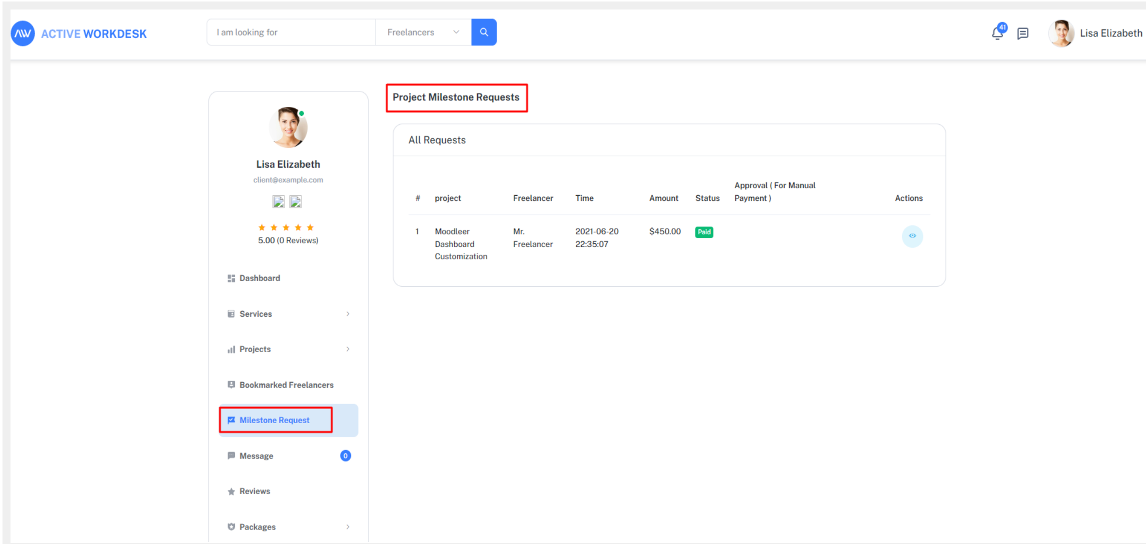


Figure (38a): Project Milestone requests list

- After that a modal will **pop up**. There again the client user has to click the **Pay Now** button.

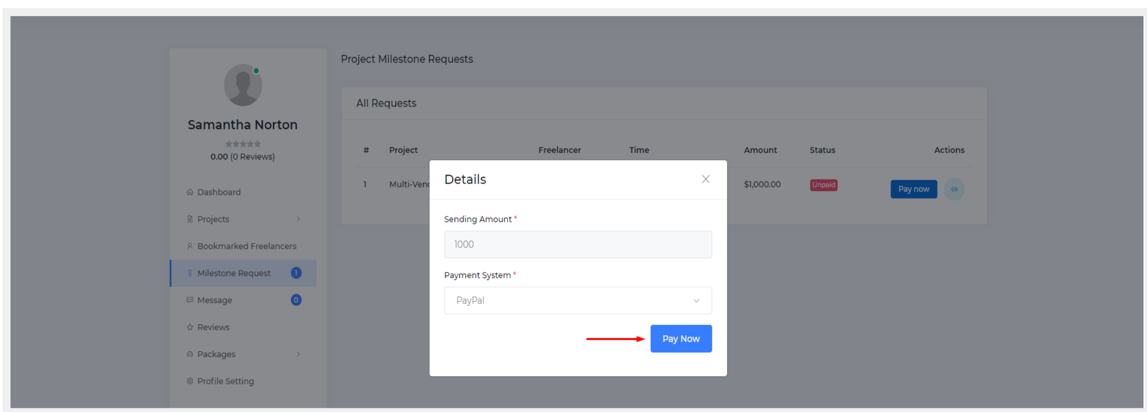


Figure (38b): pop up the details

- It will lead him to a new page with a form in it where he will have to provide his **credit card credentials** and click the **Pay Now** button residing at the bottom of the form.

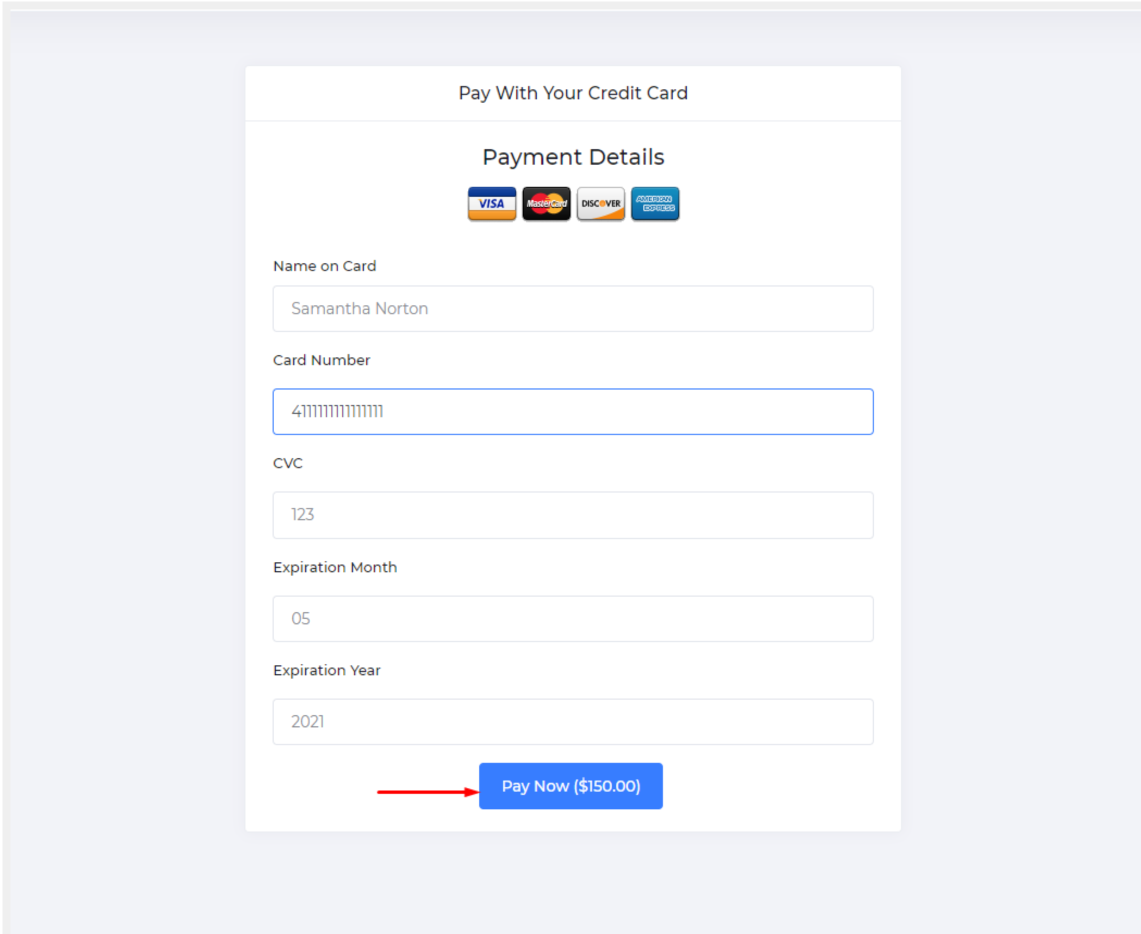


Figure (38c): Payment details form

39. How to cancel an open project?

Answer:

To cancel a project the client needs to follow the steps mentioned below:

- **Login** into the **client** panel
- Then go to **Projects > Open Projects**
- There, the client will find **all the Open Projects**.
- In every single open project you can find the Cancel Project option.
- Click on the specific project's **Cancel Project** button to cancel that project.

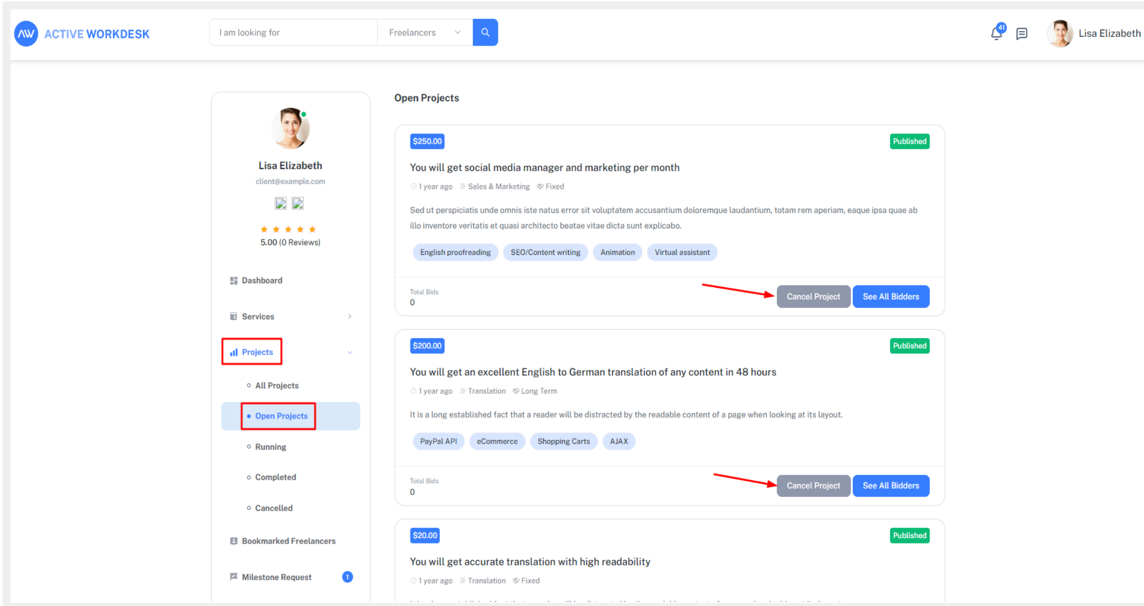


Figure (39a): Cancelling the Open project

40. How to complete a running project?

Answer:

To complete a project the user has to do the following:

- Firstly, **log in** as a **client**. Because only clients can complete a project.
- Go to **Projects > Running**
- There the client will find two buttons.
- One of them says **Complete this**.
- By clicking that button the client submits the project as being completed.
- And finally, the project will move to the Completed submenu under the Projects menu. ** The payment should also be completed before completing a project. Otherwise, The completing operation will be withheld and a warning message will be shown to the client saying 'The payment needs to be completed before completing the project'.

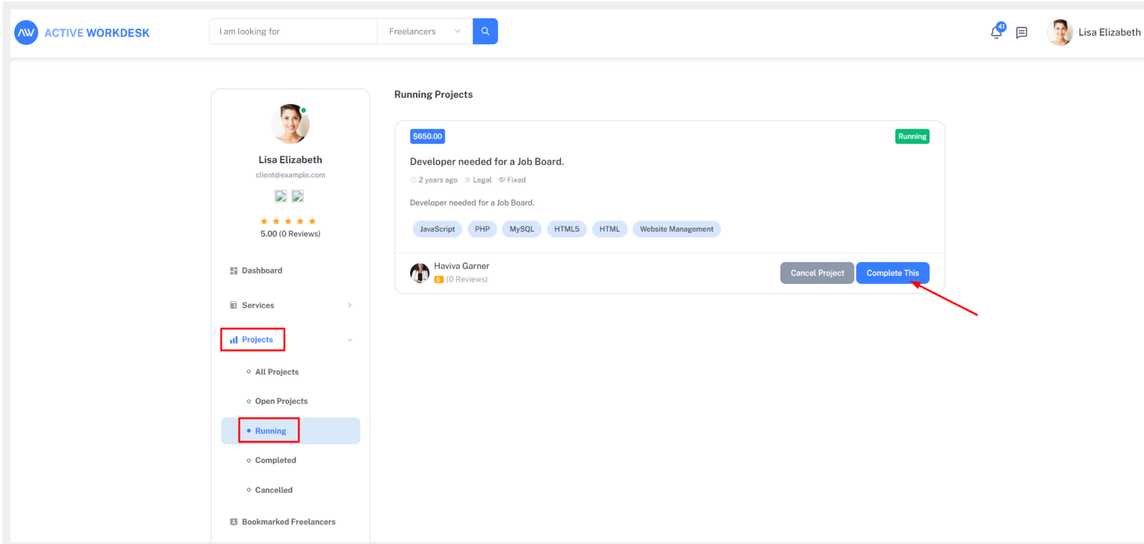


Figure (40a): Complete a running project

41. How to see all projects as a client?

Answer:

To see all projects as a client the user has to follow the steps mentioned below:

- **Login** as **client**.
- Go to **Projects** > **All Projects**

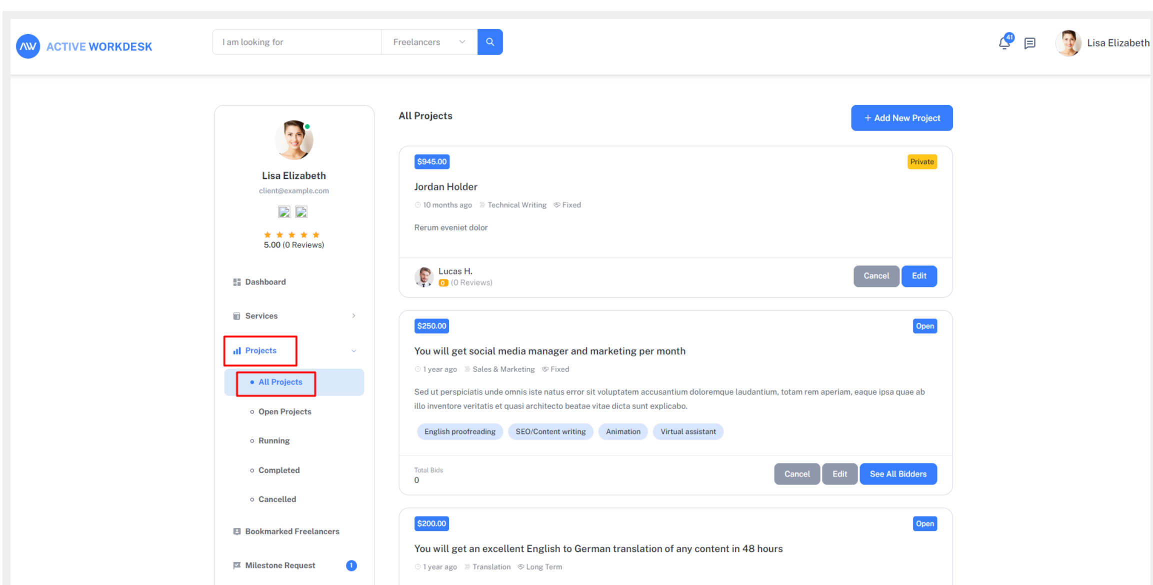


Figure (41a): All project list

42. How to see open projects as a client?

Answer:

To see open projects as a client the user has to follow the steps mentioned below:

- **Login** as a **Client**.
- Go to **Projects** > **Open Projects**.

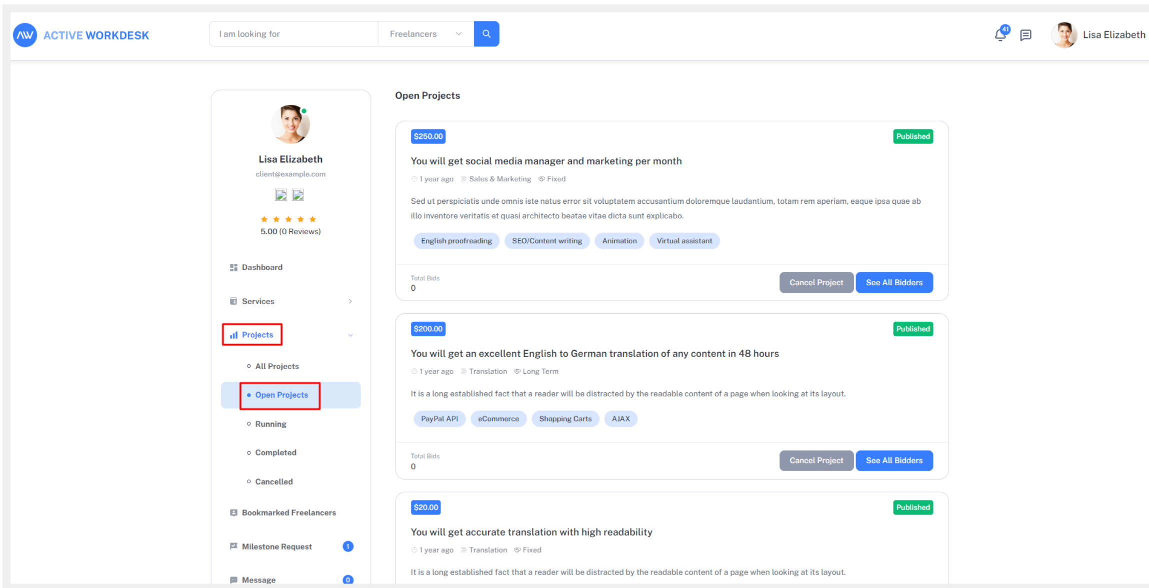


Figure (42a): All open project list

43. How to see Running projects as a client ?

Answer:

To see Running projects as a client the user has to follow the steps mentioned below:

- **Login** as a **Client**.
- Go to **Projects** > **Running Projects**.

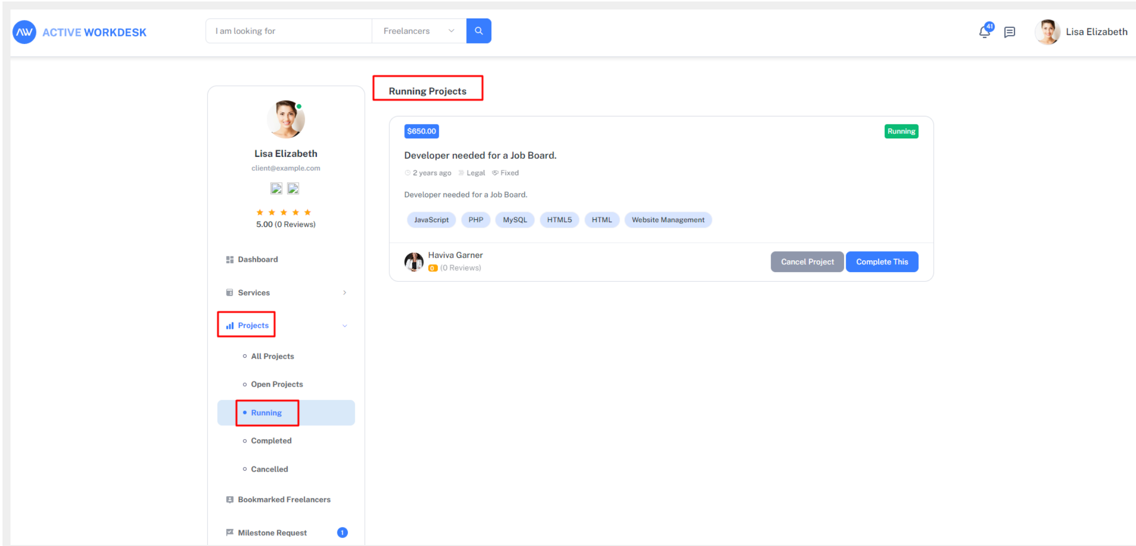


Figure (43a): All running project list

44. How to see Completed projects as a client?

Answer:

To see Completed projects as a client the user has to follow the steps mentioned below:

- **Login** as a **Client**.
- Go to **Projects** > **Completed Projects**

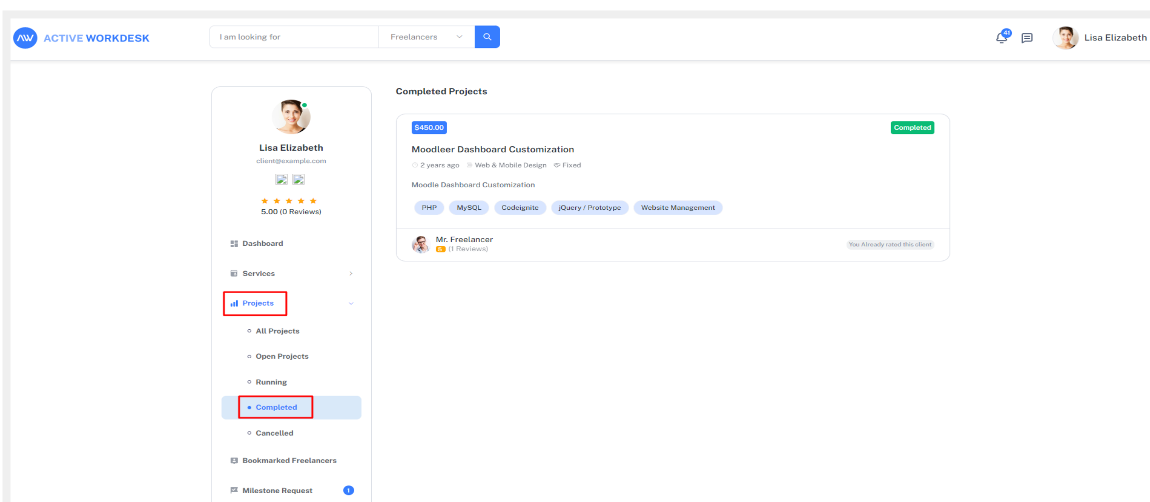


Figure (44a): All completed project list

45. How to see Canceled projects as a client?

Answer:

To see Canceled projects as a client the user has to follow the steps mentioned below:

- Login as a Client.
- Go to **Projects > Canceled Projects**.

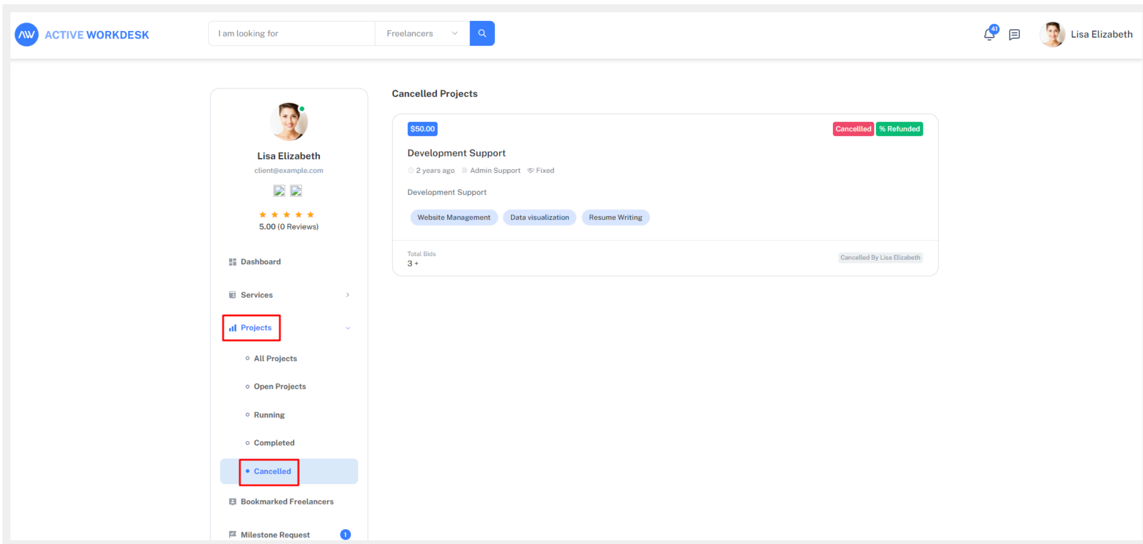


Figure (45a): All canceled project list

46. How to set up a client profile?

Answer:

To set up a client profile the user has to follow the steps below:

- Firstly, **Login** as a **client**.
- Then go to the **profile setting** menu.
- There the user will be able to insert account info, basic info, profile images.
- And Click on the **save changes** button for each section.

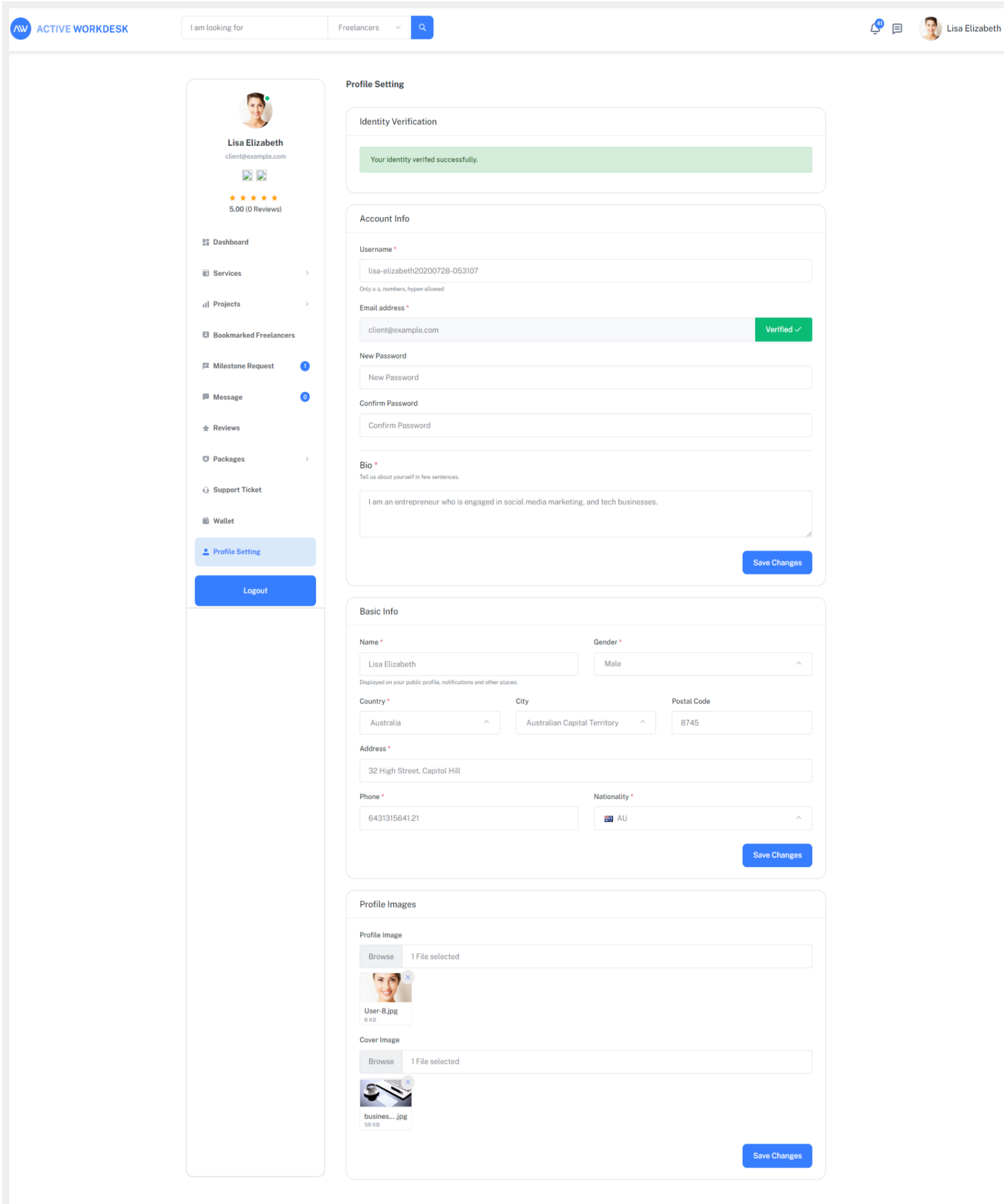


Figure (46a): Set up client profile

47. How does a client chat with his freelancers?

Answer:

For a client to chat with his freelancers he needs to do the following:

- **Log in** as a **client**.
- Go to the **Message** menu.
- Then **choose the freelancer** he wants to chat with.
- Type in the message inside the message field.
- **Attach files** by clicking the clip button on the right side of the message field.
- Choose files and click on them.
- Click the Add files button.

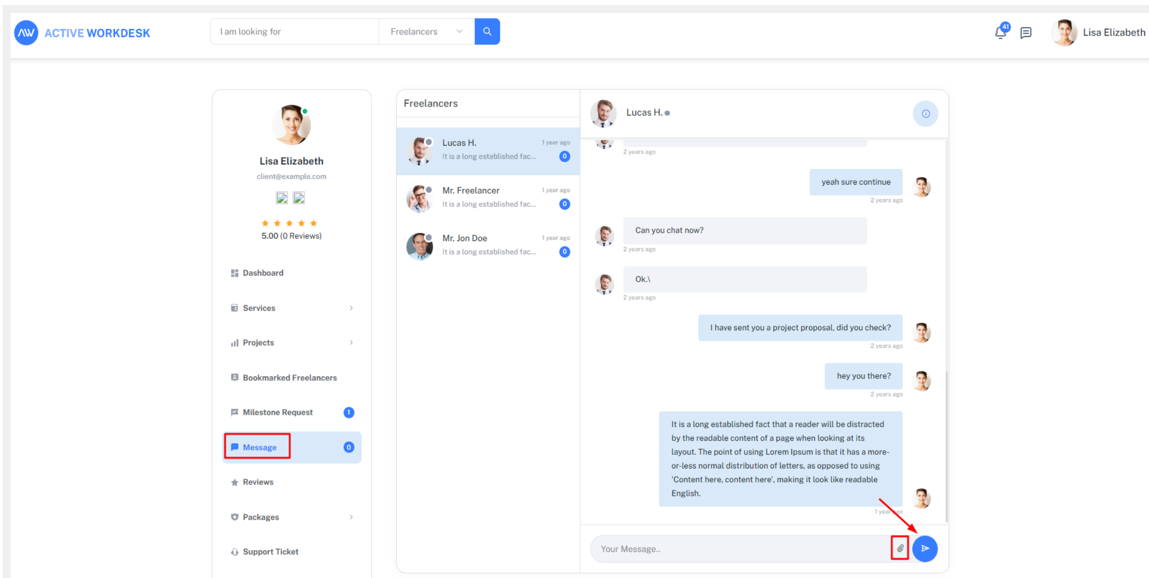


Figure (47a): a client chat with his freelancers

- The user can attach multiple files if he wishes.
- Then finally **click** the **Send** icon.

48. How does a client see all reviews?

Answer:

For a client to see all reviews the user needs to do the following steps:

- Firstly, the user needs to **log in** as a **client**.
- Click on the **Reviews** button.
- Then he will be able to see all the reviews that the freelancers made about him.

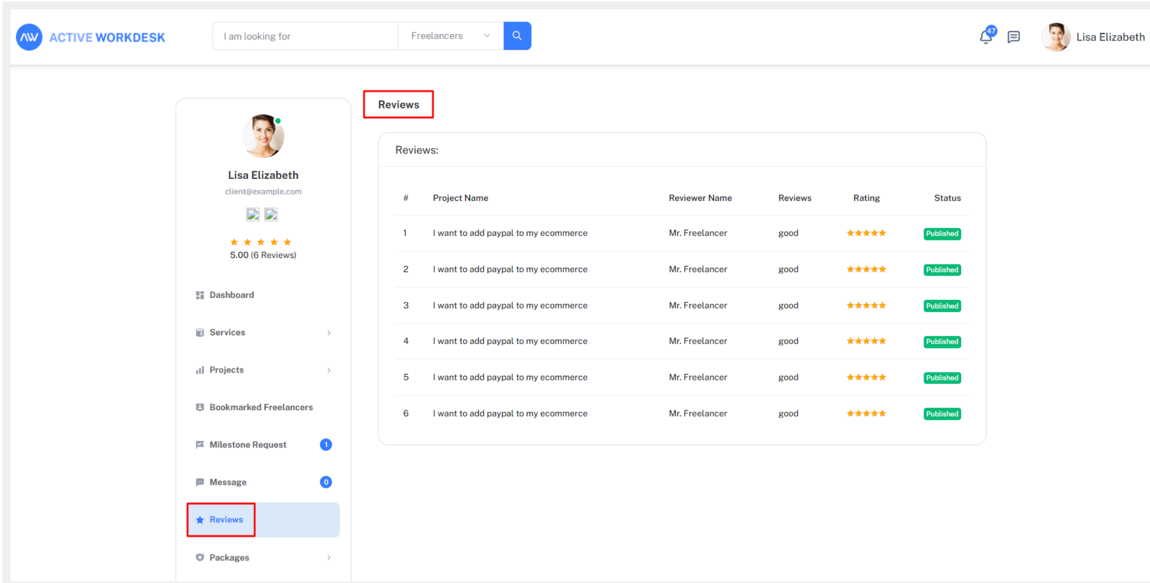


Figure (48a): a client sees all reviews

49. How does a client bookmark a freelancer?

Answer:

For a client to bookmark a freelancer he needs to do the following steps:

- Firstly, he needs to **login** as a **client**.
- Then **search** for the **freelancer**. To search for a freelancer he needs to do the following:
    - Go to the **search bar** residing at the **top navbar** of the site.
    - The user should type in the **name of the freelancer** he is searching for or keep it blank if he wants the list of all the freelancers.
    - Then select the **freelancer option** from the select option.
    - Finally, click the **search** icon at the right side of the select option.

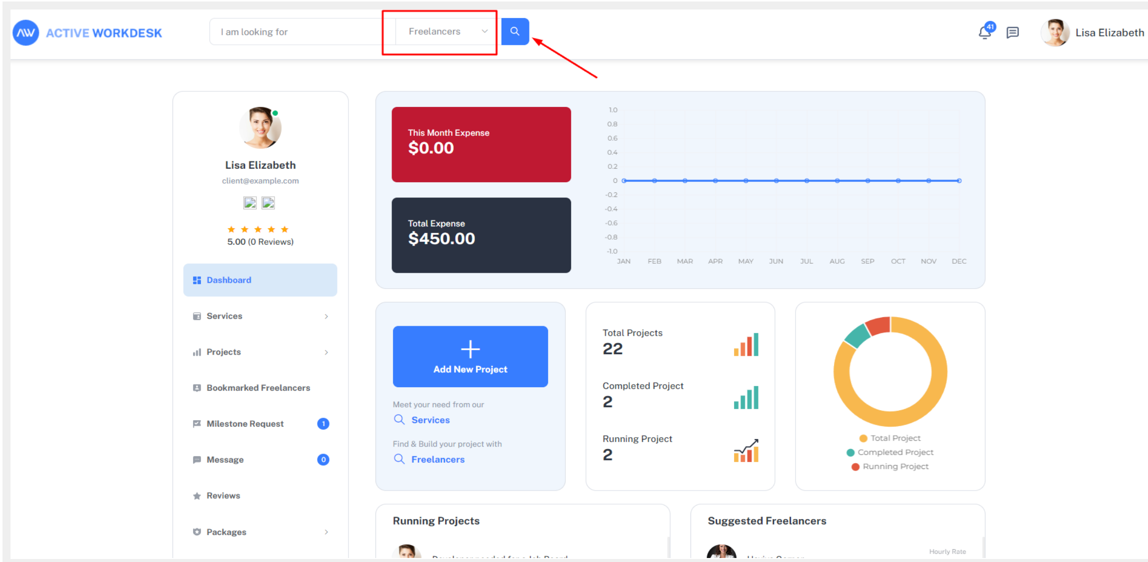


Figure (49a): Searching all freelancers list

- Go to any **freelancer details page**, for this **click** on any **freelancer's name**.
- There he will find a **Bookmark Freelancer** button.
- Just by clicking that button a client can bookmark a freelancer.

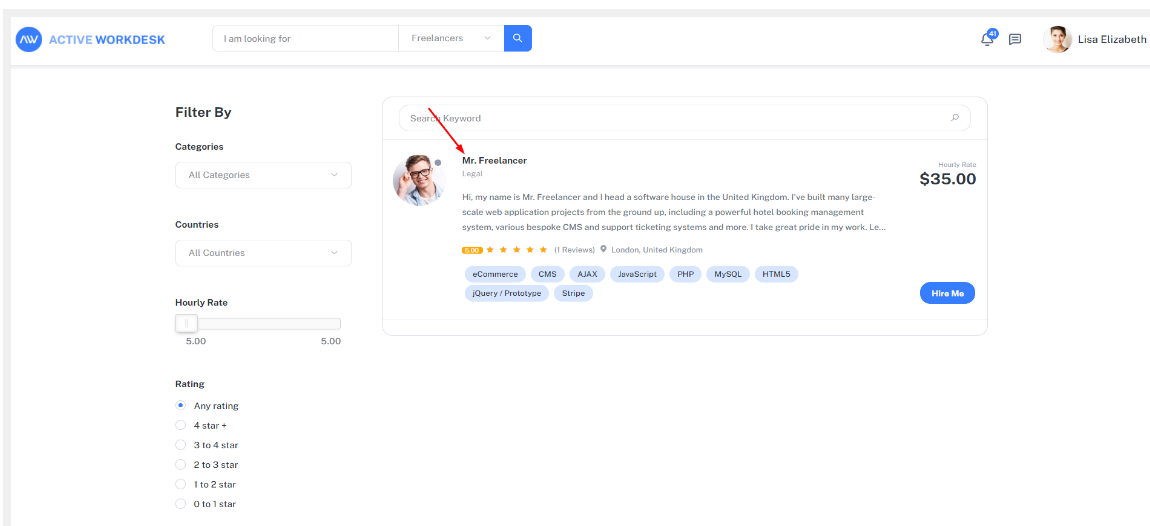


Figure (49b): click on any freelancer's name

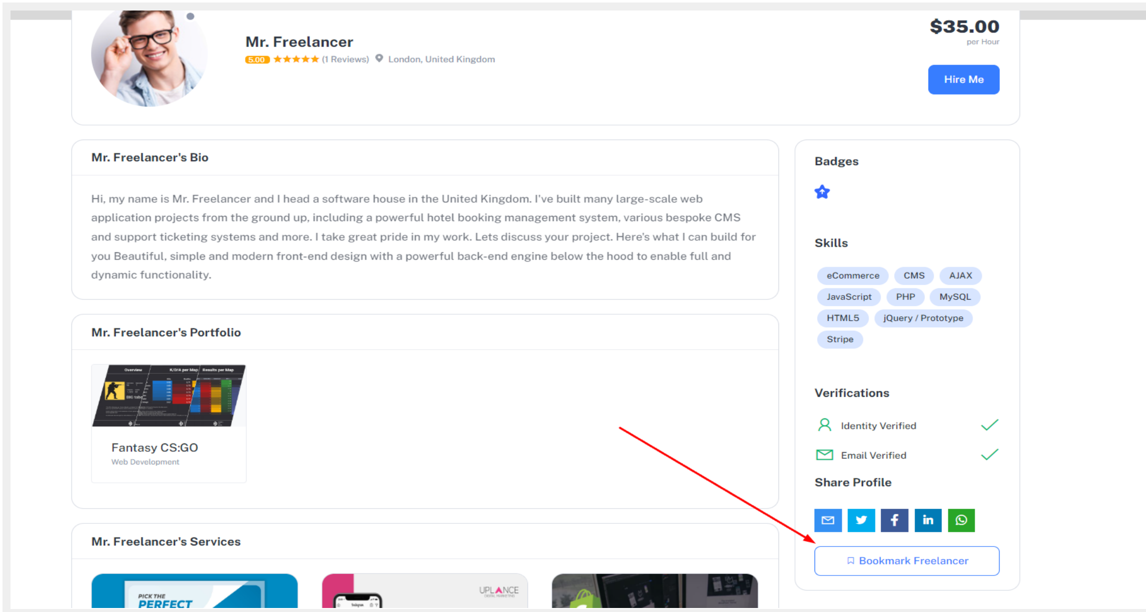


Figure (49c): Click on bookmark freelancer button

50. How does a client see all bookmarked freelancers?

Answer:

For a client to see all bookmarked freelancers he needs to follow the following steps:

- Firstly, he needs to **log in** as a **client**.
- Then go to the **Bookmarked Freelancers** menu residing on the left side-bar.
- There he will be able to see all the bookmarked freelancers.

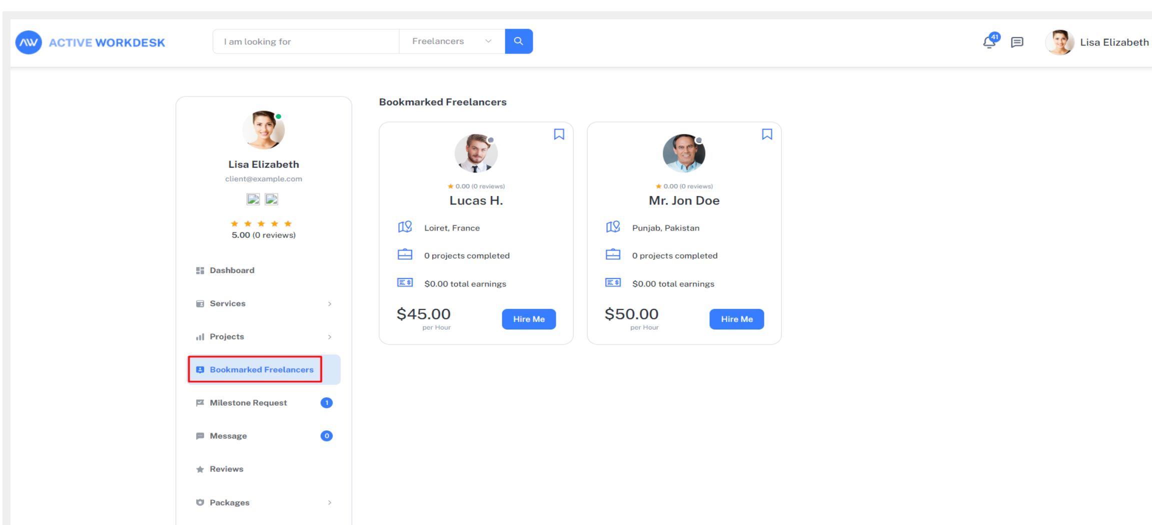


Figure (50a): All Bookmarked freelancers list

51. How to purchase any package as a client?

Answer:

To purchase a package the user has to follow the steps below:

- At First **login** as a **client**.
- Then go to **Packages** > **Upgrade/Downgrade**.
- The user has to click on the **Purchase This Package** button on the package he thinks is suitable.

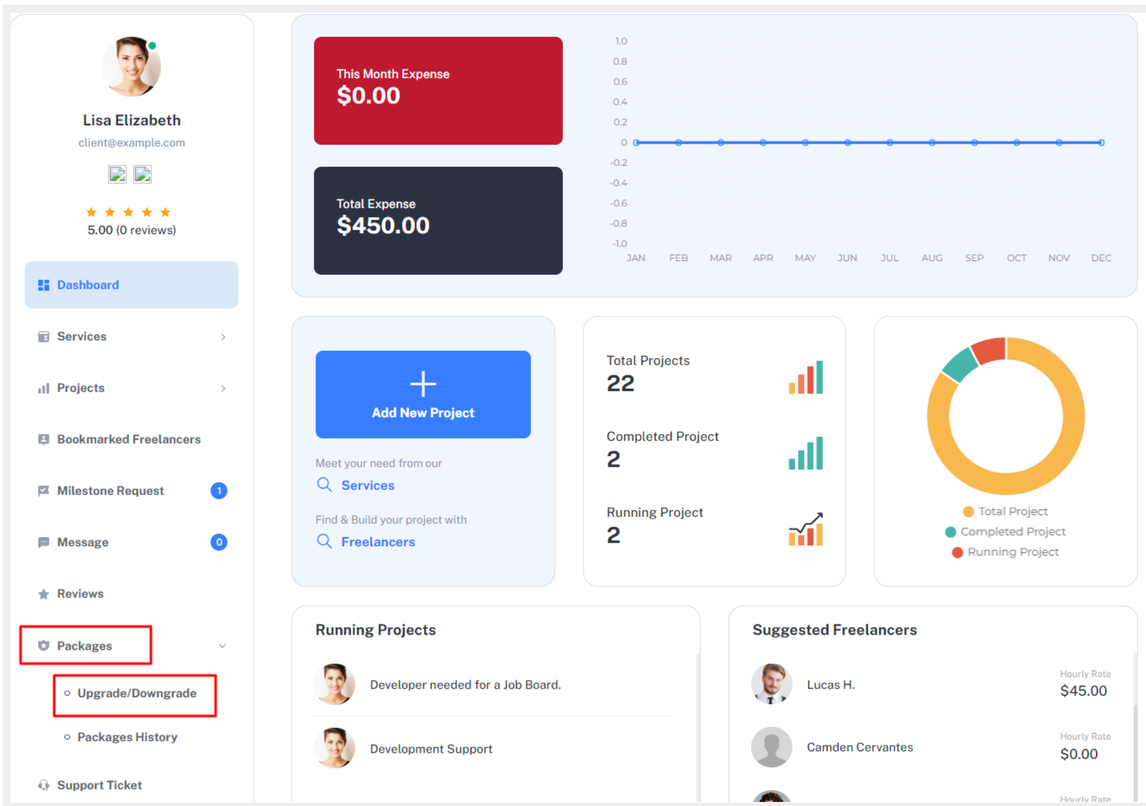


Figure (51a): Go to the packages list

- **Enter** the desirable payment system and click the **Purchase This Package** .
- Finally, the user has to provide his **credit card credentials** and press **Pay Now** .
- These packages will be related to almost all the actions of a client.
  - How many **open projects** he can create.
  - How many **fixed projects** he can create.
  - How many **long term projects** he can create.
  - How many **private projects** he can create.
  - How many **fixed private projects** he can create.
  - How many **long term private projects** he can create.

- How many **words** he can write inside his bio.
- How many **freelancers** he can **follow**.

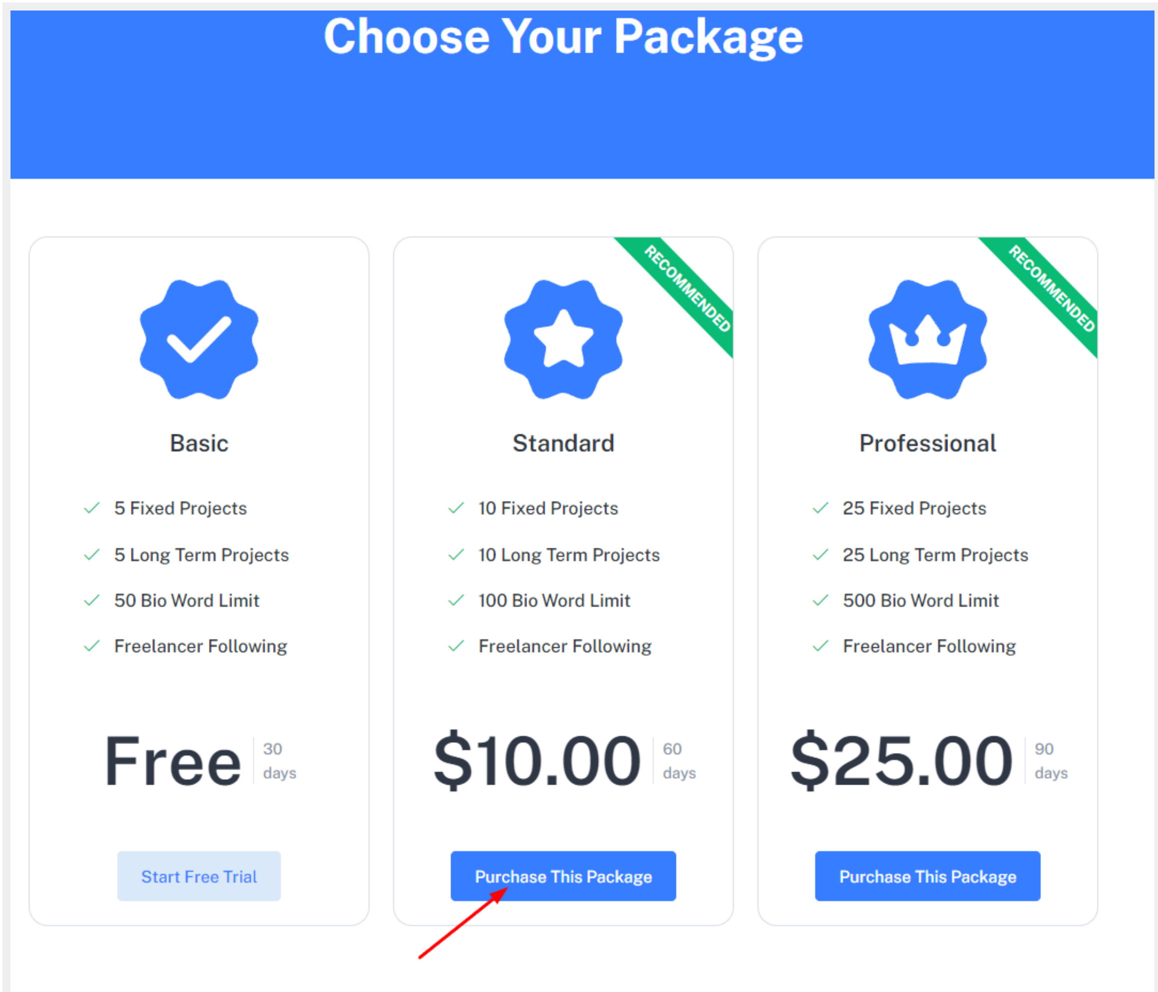


Figure (51b): Click on Purchase this package button

52. How does a client rate a freelancer?

Answer:

To rate a client the user needs to follow the steps mentioned below:

- Firstly, **Login** as a **freelancer**.
- Then go to **Projects** > **Completed**.
- There on every single completed project card he will find a button **Rate This Freelancer**.
- Clicking on the button he will be presented with a **form**.
- He can **rate** the client by clicking on different numbers of **stars**. 1/2/3/4/5 stars.
- As well, he can give his reviewing **comment**.

- Finally, **click** on the **Rate this Freelancer** button.
- After the reviewing process is complete he will be given a success message.

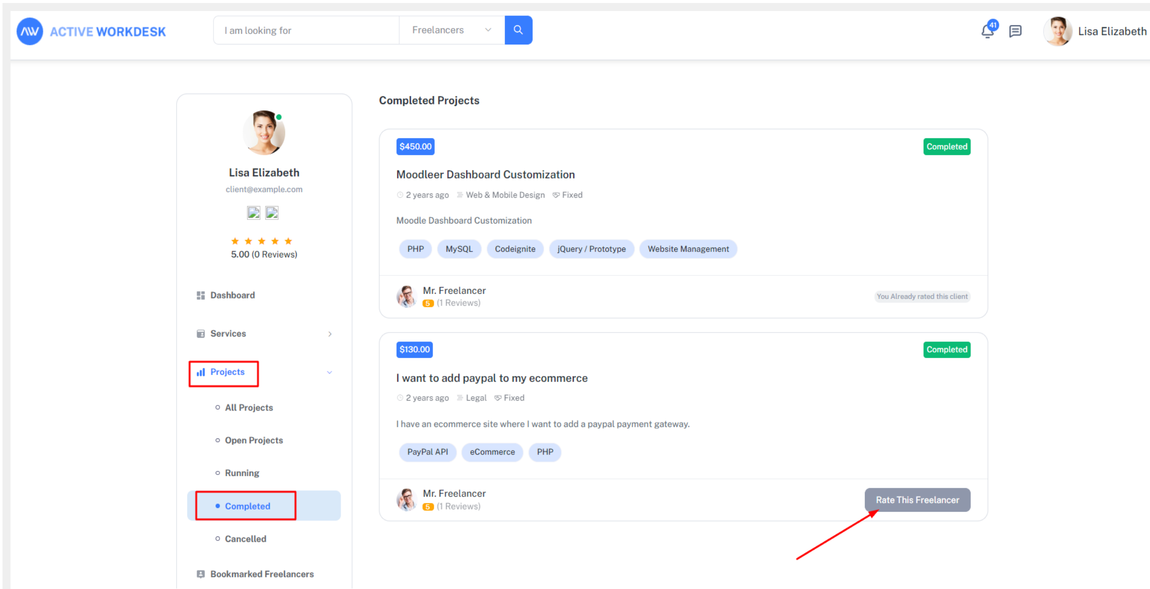


Figure (52a): Give rating any freelancer

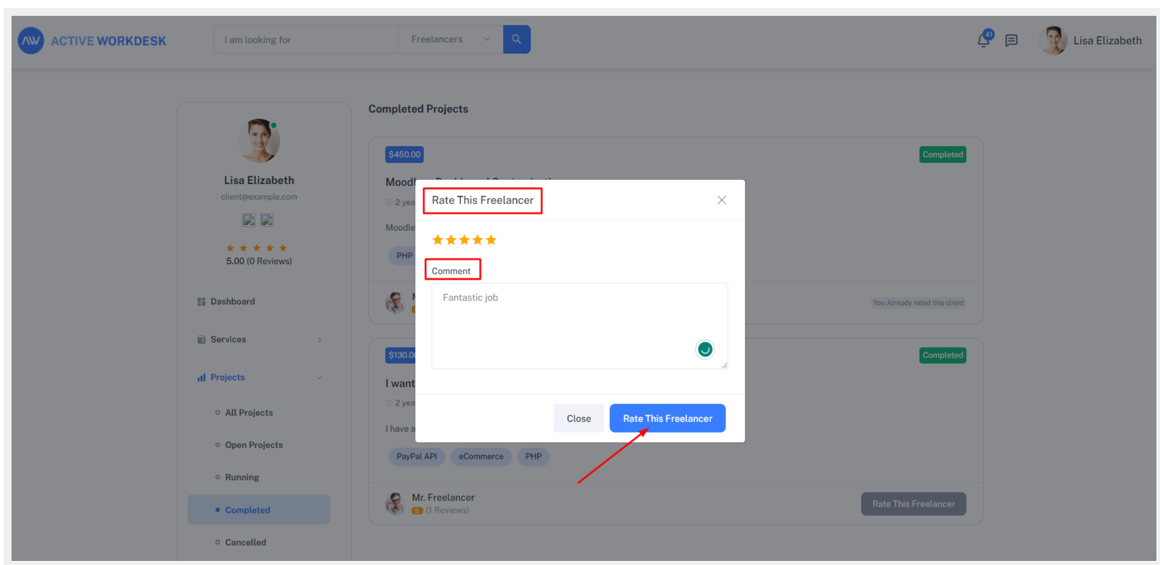


Figure (52b): Give a star and comment for any freelancer

53. How to purchase any package as a freelancer?

Answer:

To purchase a package the user has to follow the steps below:

- First **login** as a **freelancer**.

- Then go to **Packages > Upgrade/Downgrade.**
- The user has to click on the **Purchase This Package** button
- Enter the desirable payment system and click the **Purchase button**.
- Finally, the user has to provide his credit card credentials and press **Pay Now**.
- These packages will be related to almost all the actions of a client.
    - In how many **open projects** he can bid.
    - In how many **fixed projects** bids he can make.
    - In how many **long term** projects bids he can make.
    - How many **private project** proposals he can accept.
    - In how many **fixed projects** bids he can make.
    - How many **long term private** projects he can create.
    - How many **words** he can write inside his bio.
    - How many **freelancers** he can follow.

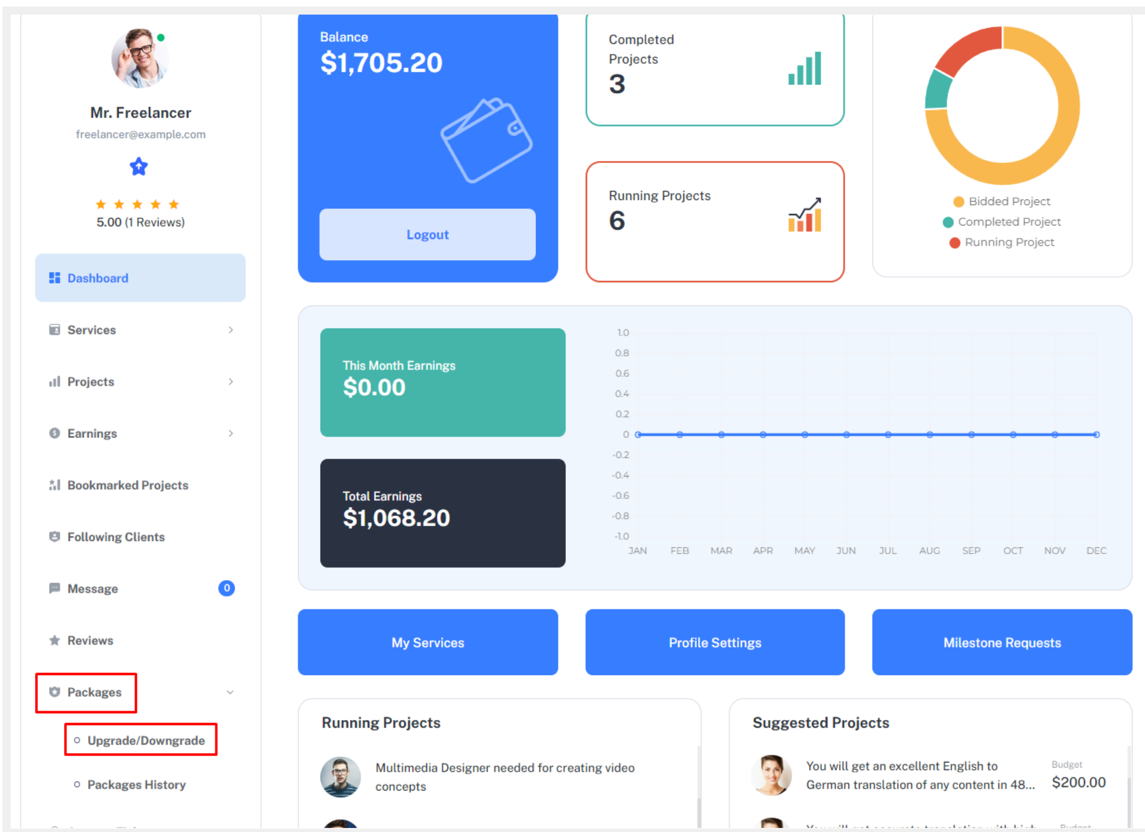


Figure (53a): go to the packages list from freelancer panel

54. How does the client verify his/her identity?

Answer:

For a client to verify his identity he needs to do the following:

- **Log in** as a **client**.
- Go to the **Profile Settings** menu from the left sidebar of his panel.
- **Browse for** the **NID/Passport** pdf to be uploaded.
- Click the **Save Changes** button.
- Finally, when the admin **verifies his identity**. He will be able to **see** it in his **profile settings**.

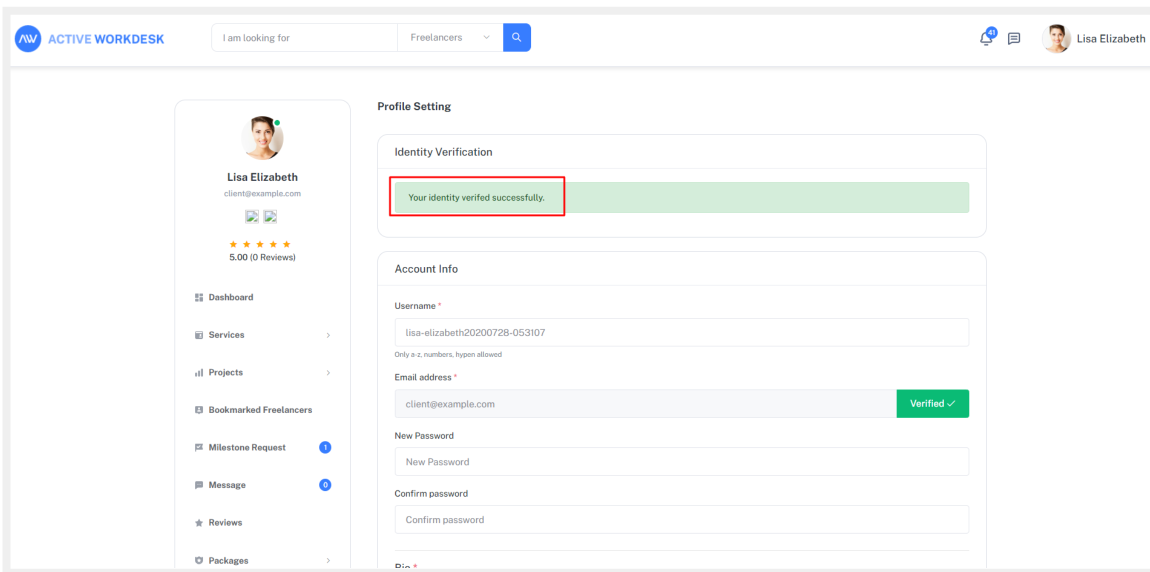


Figure (54a): Client Identity Verification

55. How does a client purchase a service?

Answer:

The client needs to follow the steps mentioned below to purchase a service.

- Firstly, the client needs to **log in.**
- Go to the **services** or search for specific services from the search bar visible at the **top header nav.**
- Beside the search bar, there is a dropdown from that dropdown the client needs to **select Services.** And then press enter or **click** the search icon.
- Then the matched results of services will be shown on the screen or the service listing page will be visible.

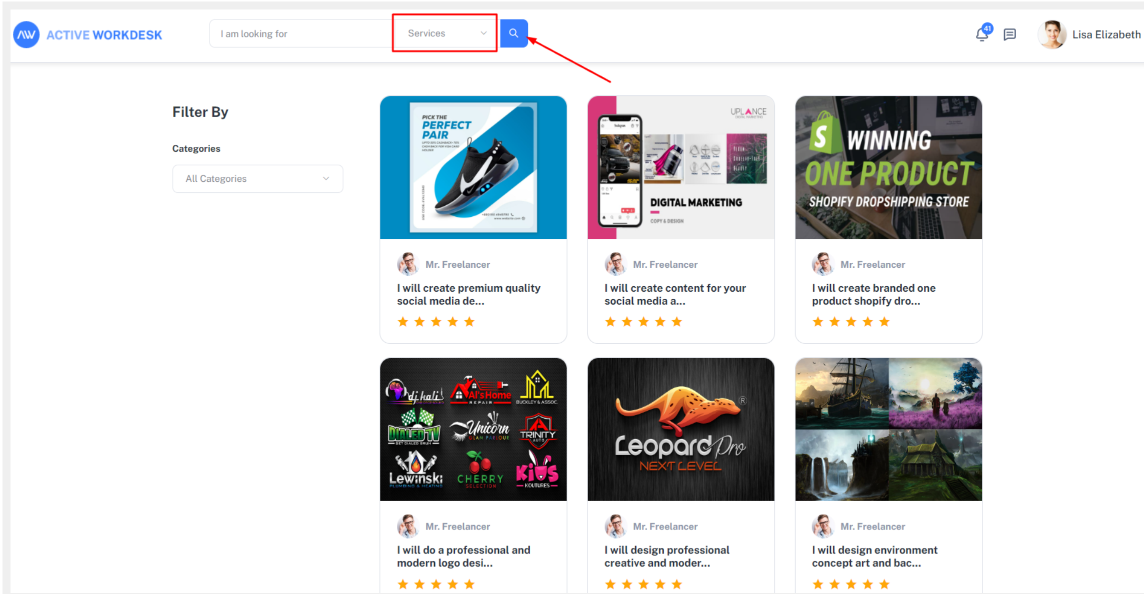


Figure (55a): Search for services

- After that the client can **select** any of the **services** of **his/her choice**.
- Not only that he can choose the service but also what type of service he wants to purchase. I.e: Basic, Standard, and Premium. See the images below for a better understanding.
    - **Basic:**

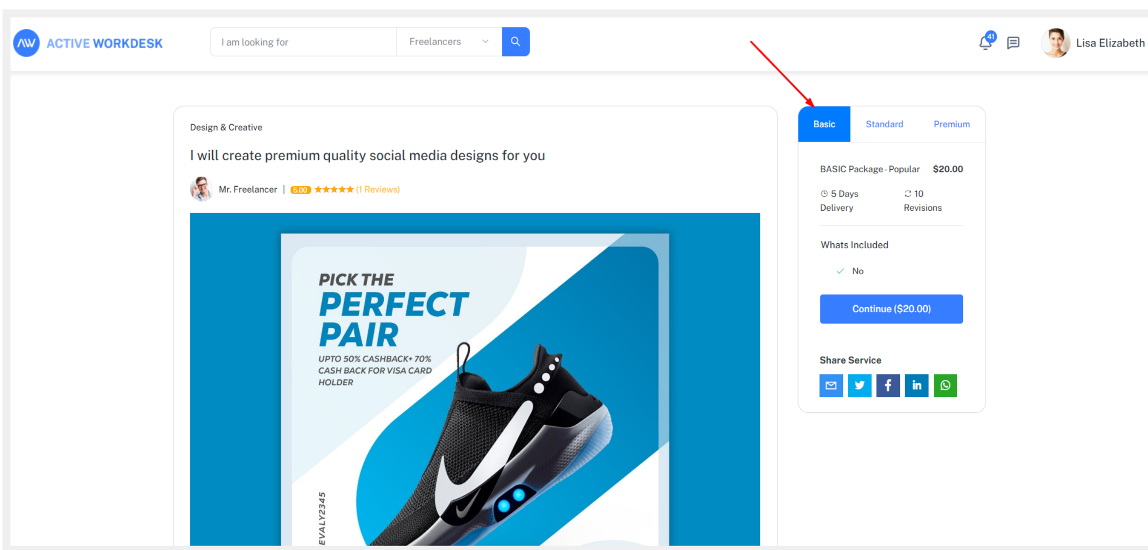


Figure (55b): Basic type of services

- **Standard:**

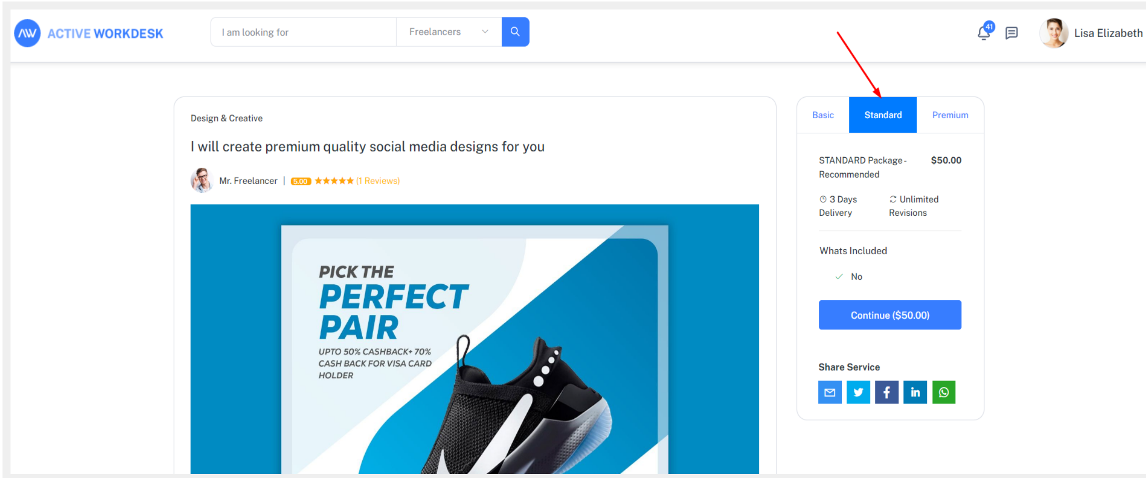


Figure (55c): Standard type of services

- ○ **Premium:**

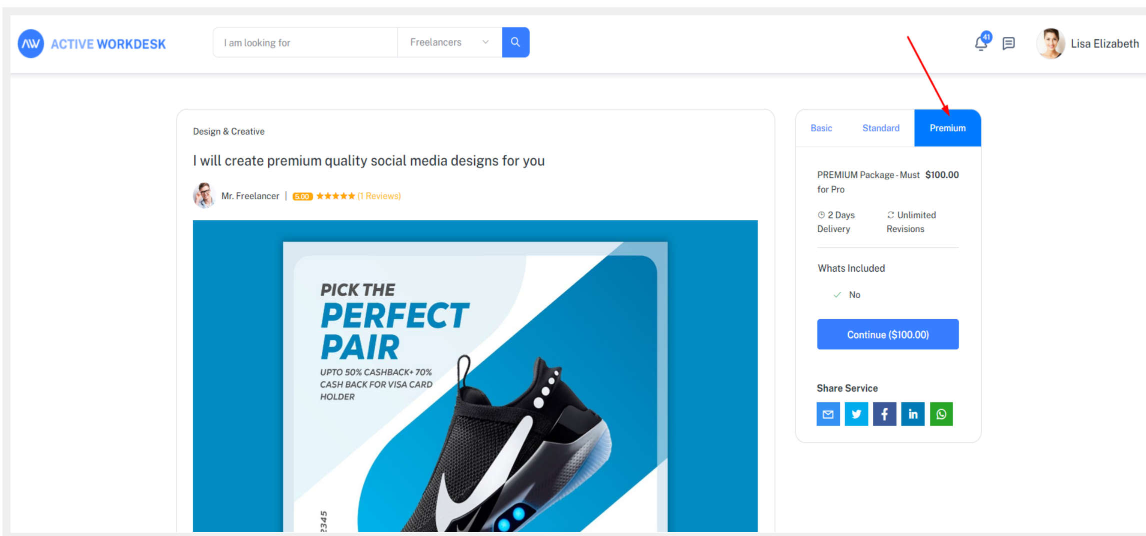


Figure (55d): Premium type of services

- After Clicking the **Continue** button the client can select the **payment method** of his/her choice to finalize the purchase.

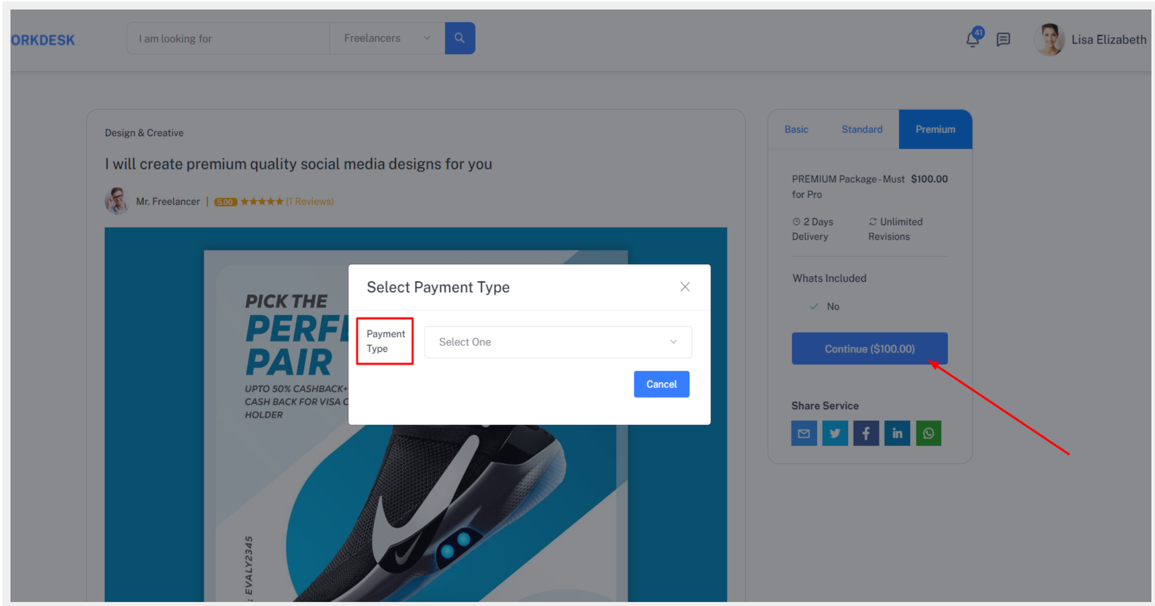


Figure (55e): Selecting payment type

56. How does a freelancer view all of his purchased services?

Answer:

For viewing all of his purchased services the client needs to do the following:

- At first, the client needs to **log in** to his/her panel.
- Then go to **Services** > **Purchased Services**

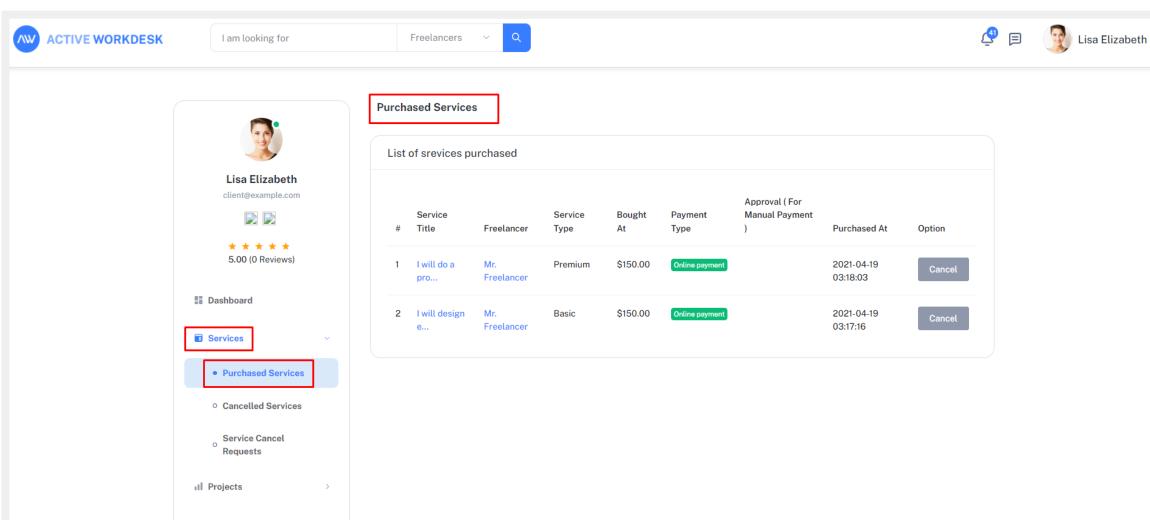


Figure (56a): View all purchased services

This portion deals with the freelancer-side login

57. How does the user get registered as a freelancer?

Answer:

The registration system is very simple and easy. To get registered as a freelancer a user needs to follow the steps below:

- Go to the **homepage**.
- At the top corner of the page there is a Log In button and a **Get Started** button.
  - If you are already registered into the system then Log in with your credentials.
  - Otherwise, Click the **Get Started** button and **register** your account.
- To register, the user has to provide **proper information** inside the registration form.
- Then select the **As A Freelancer** radio button.
- Finally, Click the **Join With Us** button.
- If the user wants he can also join with Facebook, Google, Twitter or LinkedIn.

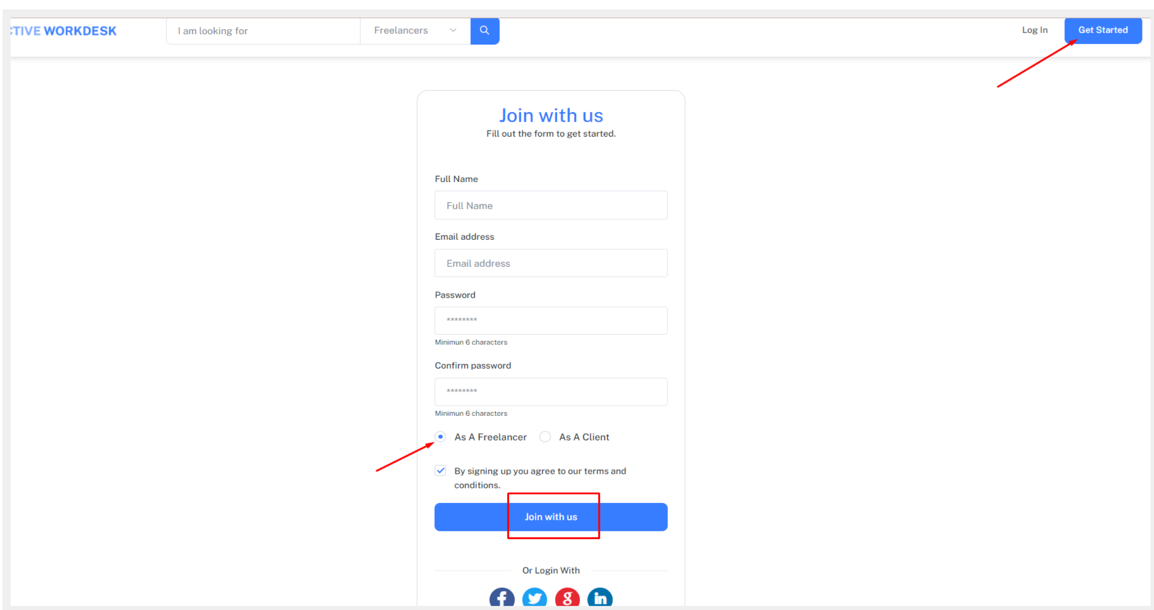


Figure (57a): Register as a freelancer

58. How to bid for a project?

Answer:

To bid for a project the user has to follow the steps mentioned below:

- The Freelancer will be able to place bids provided that he has not exceeded his bidding limit which was mentioned in the package he purchased.
- **Login** to the **freelancer** panel.
- Then go to **all projects listing** page
    - There is a search bar at the top. Select **Projects** and then click the **search** button.
- After the listing page arrives. The user should **select** the project he wants to bid.

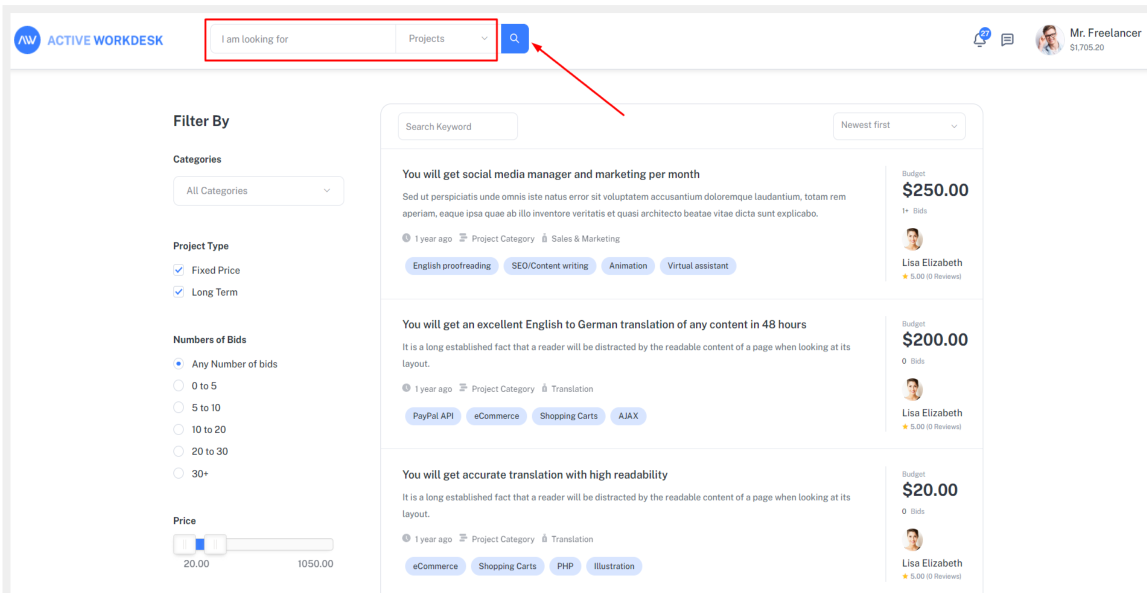


Figure (58a): Search for project

- Then click on the **Place Bid** button.

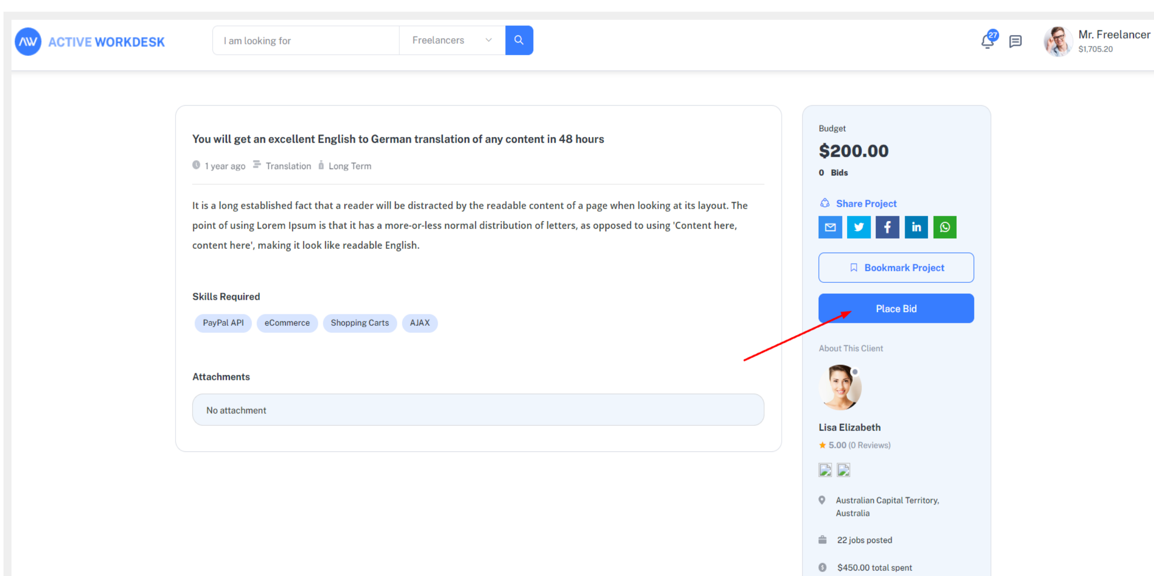


Figure (58b): Place bid for a project

- A **form** will come up and the user has to Place a bid price and give a cover letter and click **submit**.

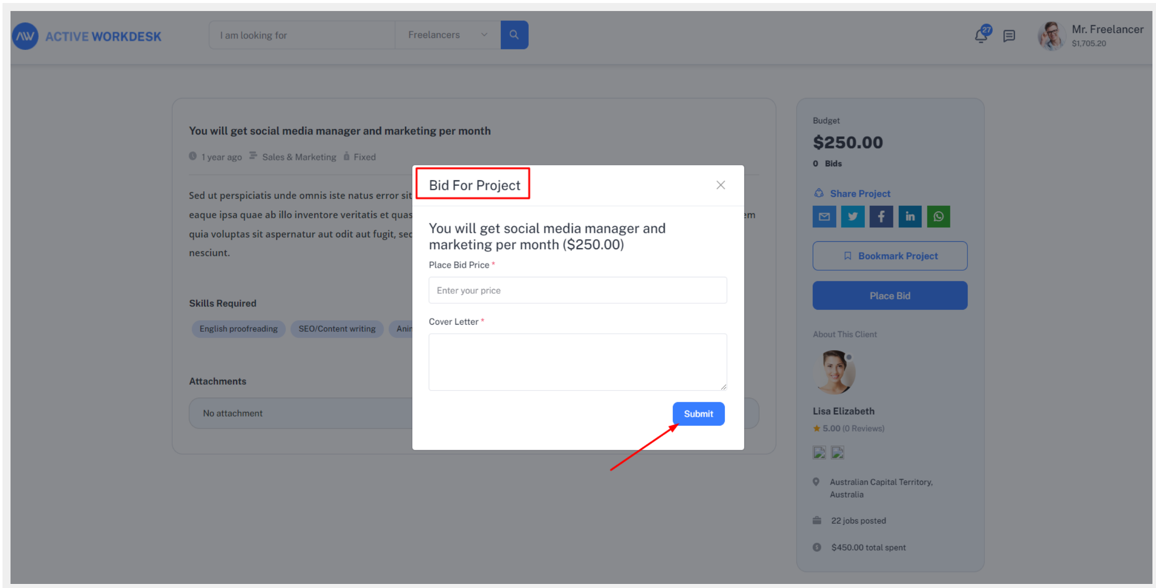


Figure (58c): Finally click on submit button for Place bid

59. How many projects can a freelancer bid?

Answer:

The freelancer will be able to bid on the number of projects mentioned in the terms of the package he purchased.

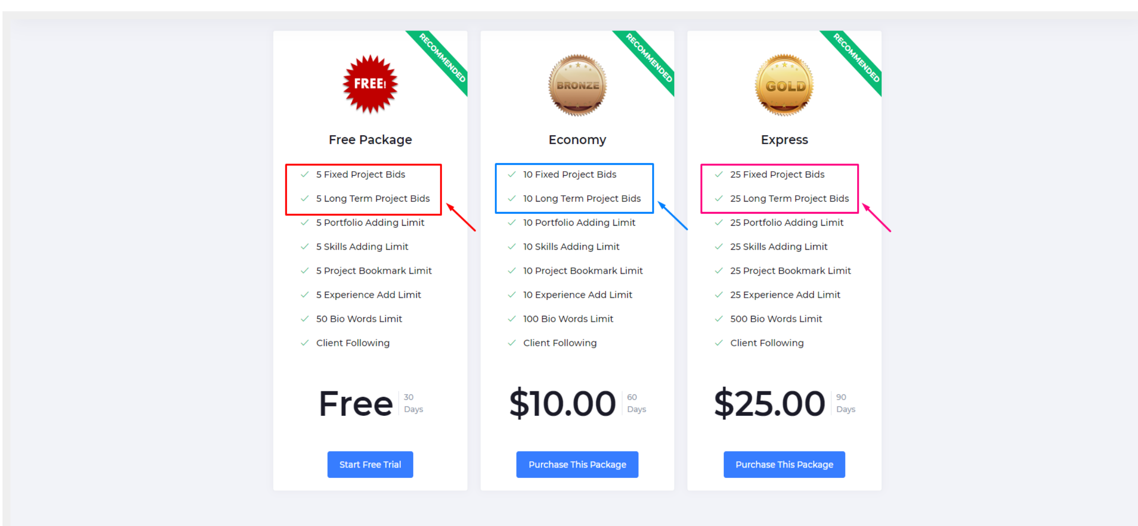


Figure (59a): Place bid for project

60. **How to send milestone payment requests to clients?**

Answer:

To send milestone requests the user has to follow the steps below:

- **Log in** as a **freelancer**.
- Go to **Projects** > **Running**.
- Then click on the **Send Payment Request** button of a particular project.

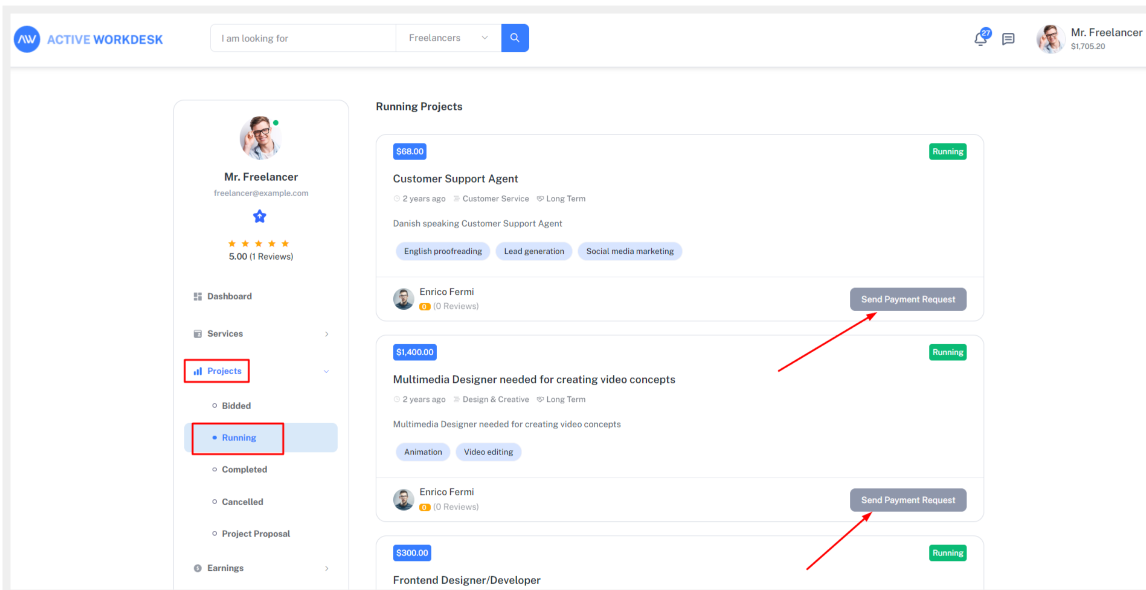


Figure (60a): A freelancer sends a payment request to clients

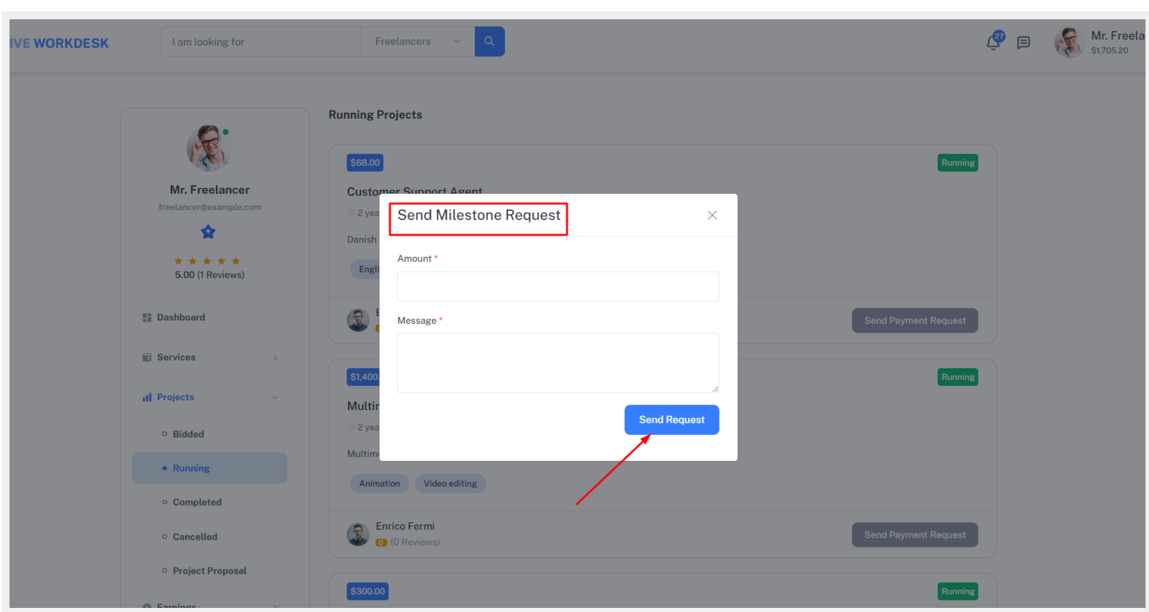


Figure (60b): Send Milestone Request form

- Finally, the user has to enter the payment **amount** and a **message** and click on **send request**.

**One thing should be noticed, when the client pays the freelancer. The freelancer does not get all of the payment. Rather, a certain amount(commision amount according to the freelancer package) of the payment is deducted by the admin from the payment that has been sent. To get the money in hand from his/her balance, the freelancer needs to send a withdrawal request to the site admin.

61. How to withdraw money as a freelancer?

Answer:

To withdraw money as a freelancer the user must follow the steps mentioned below:

- It is noticeable that the freelancer will be able to request for withdrawal of money provided that he has not exceeded the limit of withdrawal requests mentioned by the admin inside the terms and conditions section.
- **Log in** as a **freelancer**.
- Go to **Earnings** > **Withdraw Request**.
- User should enter the **amount** he wants to withdraw along with the **payment method** and a **message**.
- Finally, click the **Request for Withdraw** button.

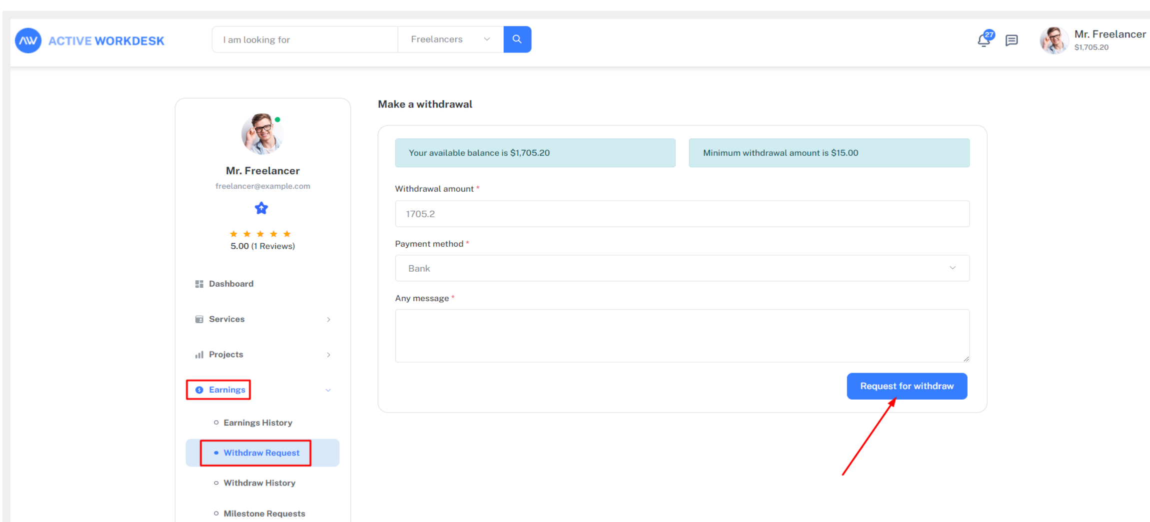


Figure (61a): Send withdraw Request

62. How to set up a freelancer profile?

Answer:

To set up a freelancer profile the user has to follow the steps mentioned below:

- Firstly, **log in** as a **freelancer**.
- Then go to **Setting** > **Profile Setting**.
- There the user will be able to set his profile.
- Freelancers can add **Account info**, **Basic info**, **profile image**, **portfolio**, **work experience**, and **educational information** according to his current package.
- After entering proper information about himself the user has to click the **Save Changes** button and **add button**.

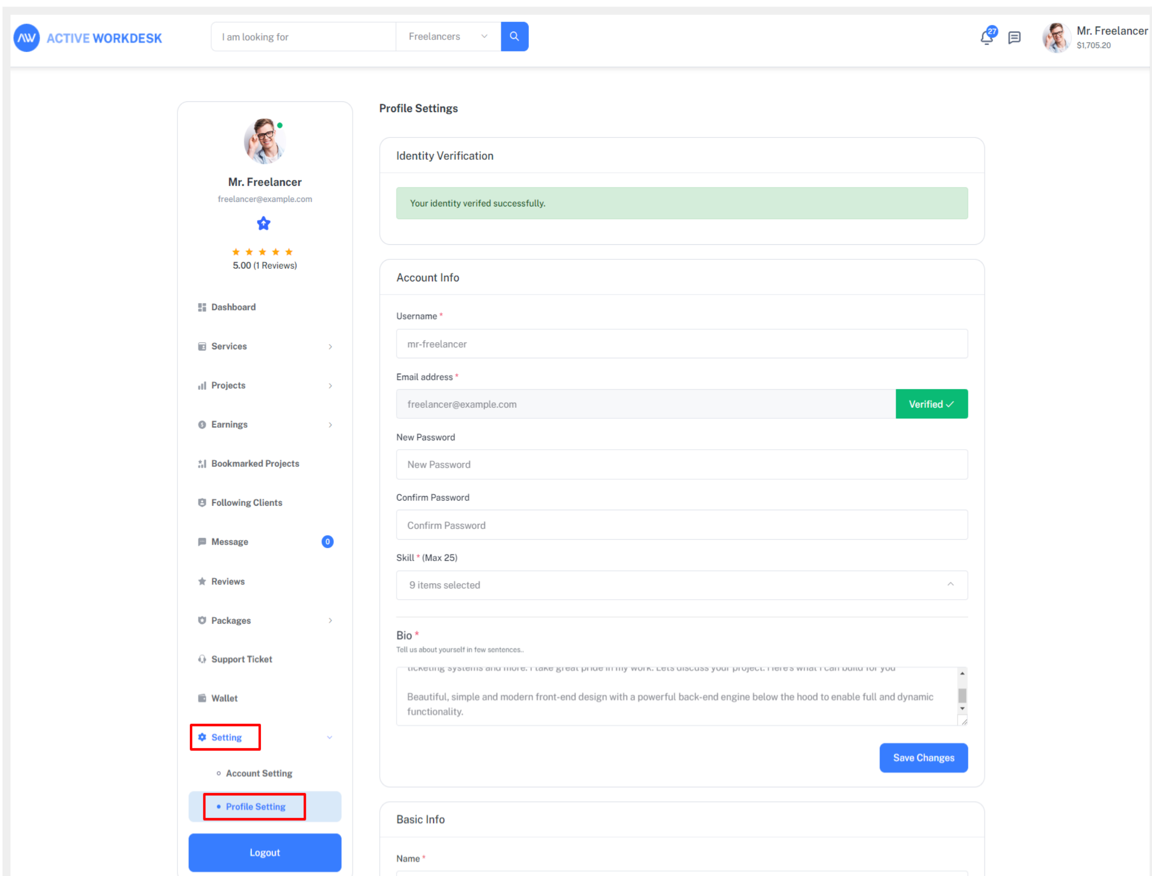


Figure (62a): Set up freelancer profile

63. How does a freelancer manage a project proposal?

Answer:

To manage a project the user has to do the following:

- First, **log in** to the **freelancer** panel.
- The client will be able to propose a specific freelancer for a project.
- The Freelancer will get notified.
- The freelancer will be able to accept the request in the following manner.
    - The freelancer has to go to **Project** > **Project Proposal**.
    - All of the projects that have been proposed to the freelancer will be visible on that page.
    - There he will be able to accept or reject the proposal made by the client.
    - User has to click accept to **accept** the proposal.
    - Else click reject to **reject** the proposal.
    - Or he/she can also **chat with client**

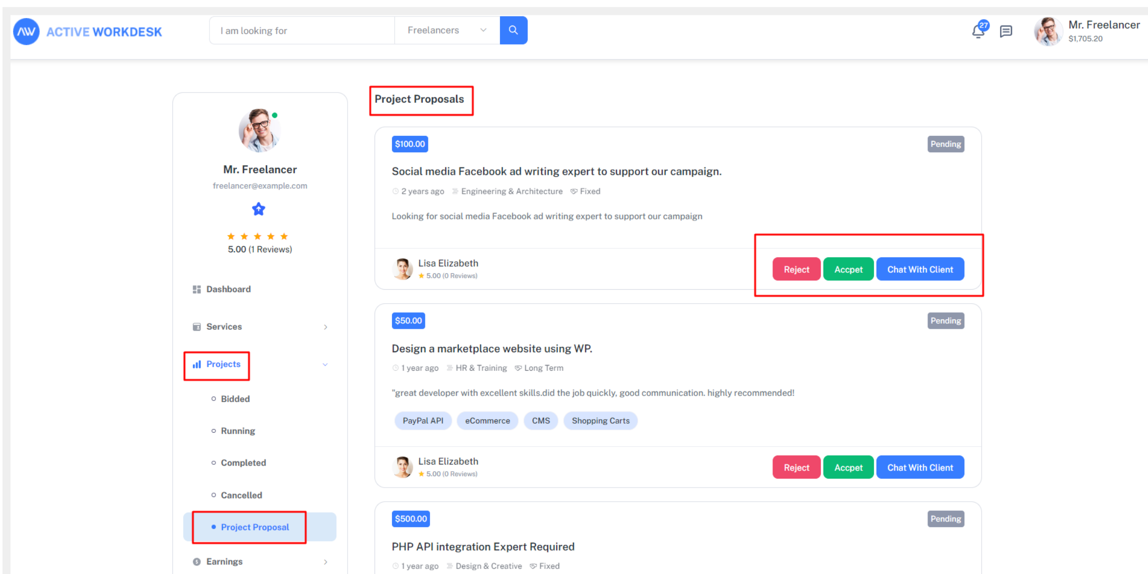


Figure (63a): Freelancer manage project proposal

64. How does a freelancer see all of the bidded projects?

Answer:

To see all of the bidded projects the user has to do the following:

- **Log in** as a **freelancer**.
- Then go to **Project** > **Bidded**.
- There he/she will be able to see all the bidded projects as well as see the status of the bidding. I.e: rejected, hired / not hired.

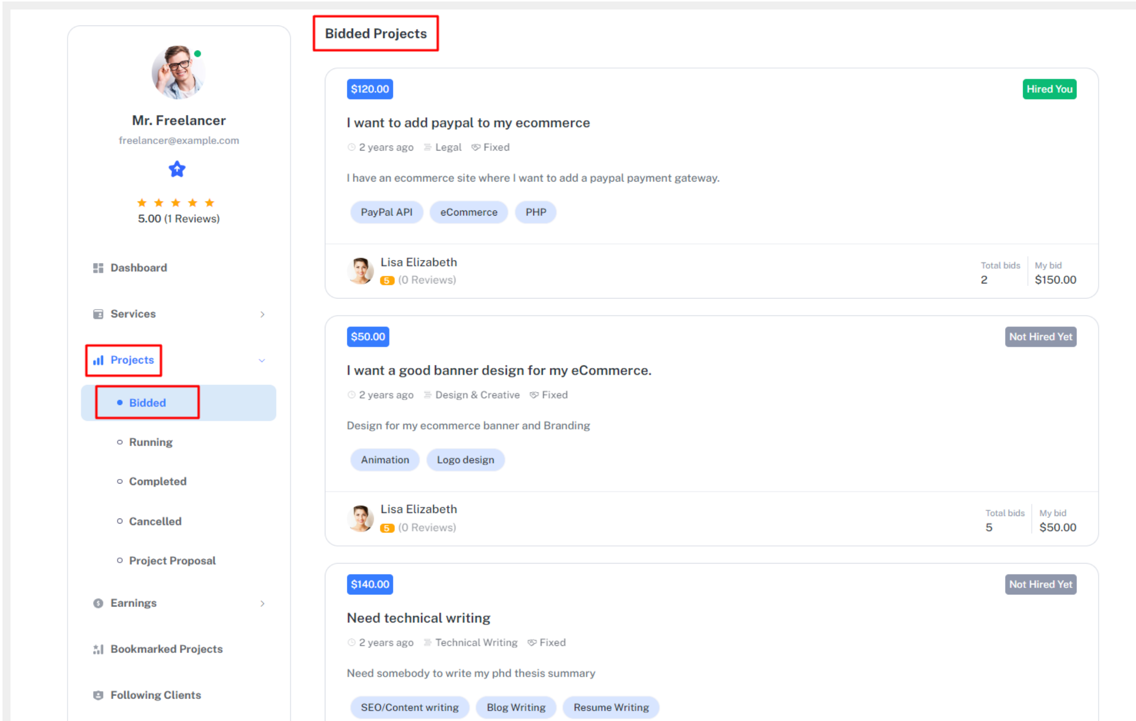


Figure (64a): Freelancer sees all the bidded projects

65. How does a freelancer see all the running projects?

Answer:

To see all of the running projects the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Projects** > **Running**

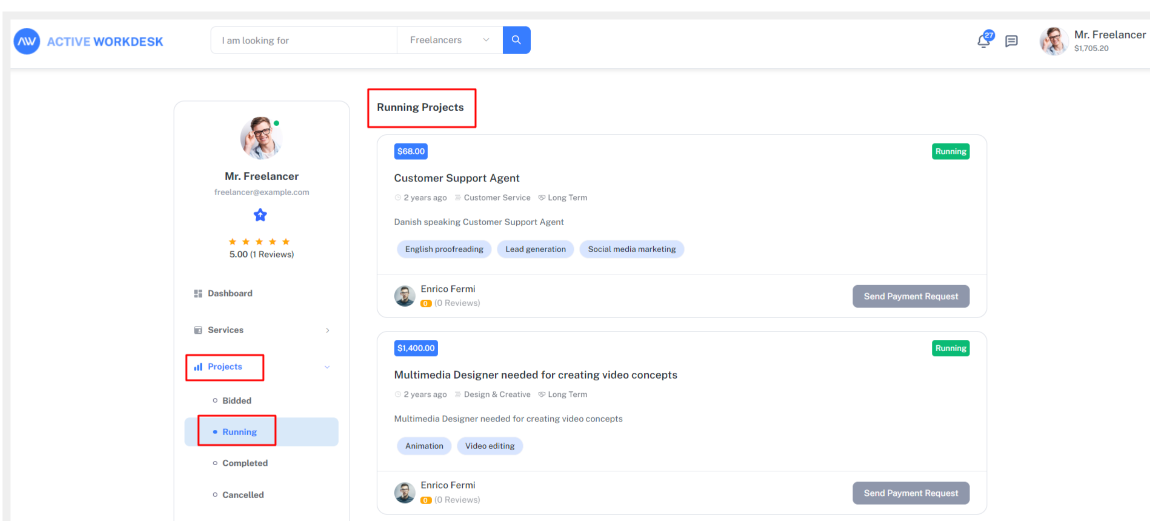


Figure (65a): Freelancer sees all the running projects

66. How does a freelancer see all the completed projects?

Answer:

To see all of the completed projects the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Projects** > **Completed**

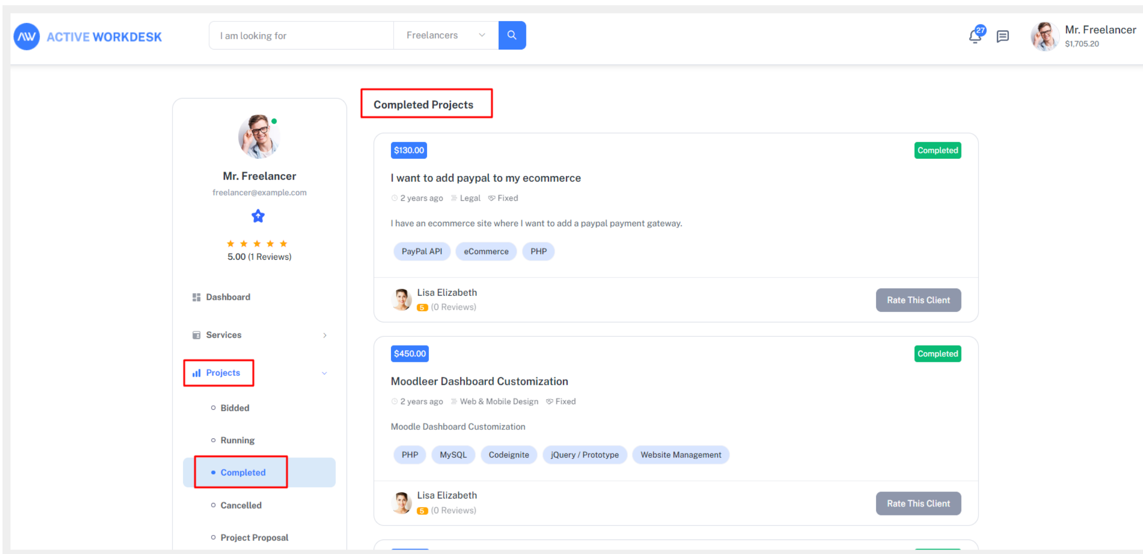


Figure (66a): Freelancer sees all the completed projects

67. How does a freelancer see all the canceled projects?

Answer:

To see all of the canceled projects the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Projects** > **Canceled**.

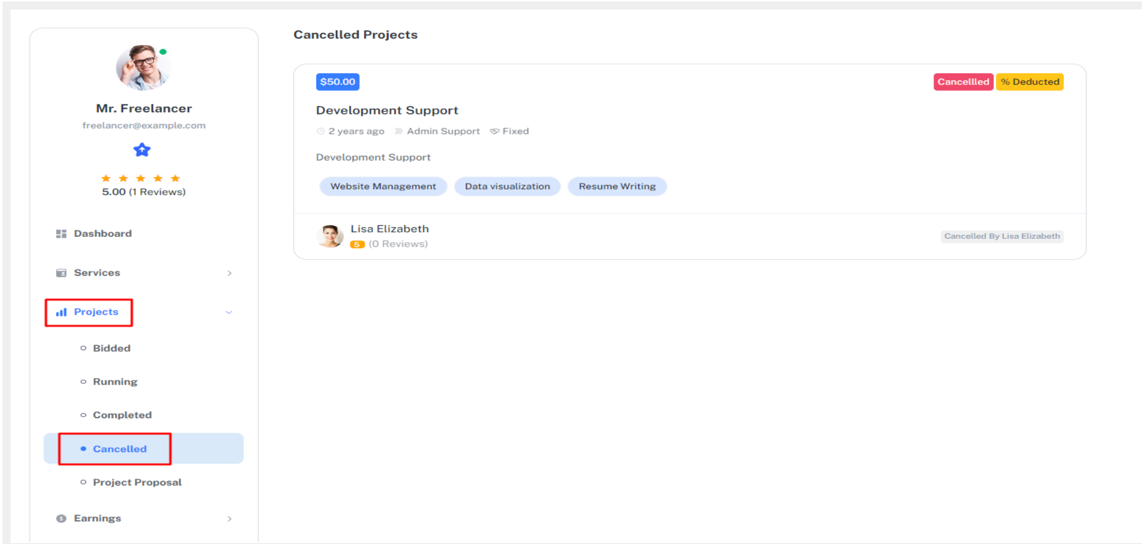


Figure (67a): Freelancer sees all the canceled projects

68. How does a freelancer see all the earnings history?

Answer:

To see all of the earnings history the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Earnings** > **Earnings History**.

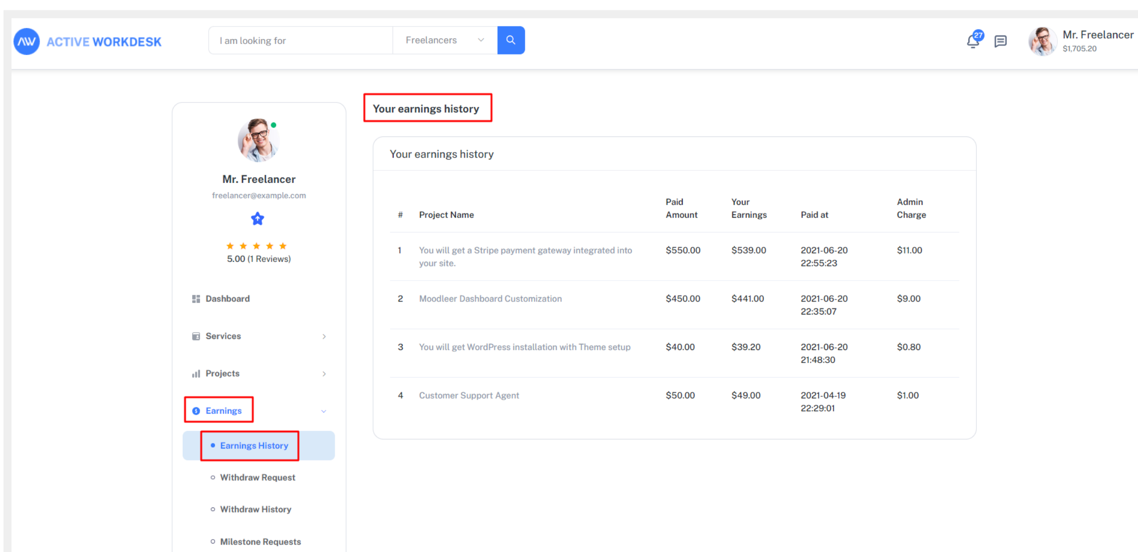


Figure (68a): Freelancer sees all the earning history

69. **How does a freelancer see all the withdrawal history?**

Answer:

To see all of the withdrawal histories the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Earnings** > **Withdraw History**.

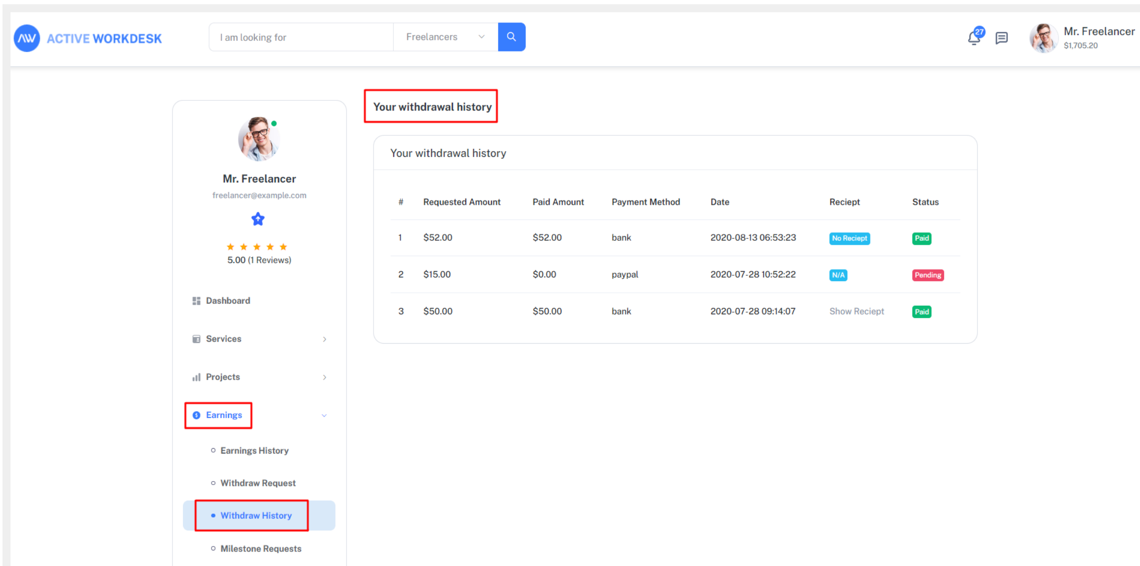


Figure (69a): Freelancer sees all the withdrawal history

70. **How does a freelancer see all the milestone requests?**

Answer:

To see all of the milestone requests the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Earnings** > **Milestone Requests**.

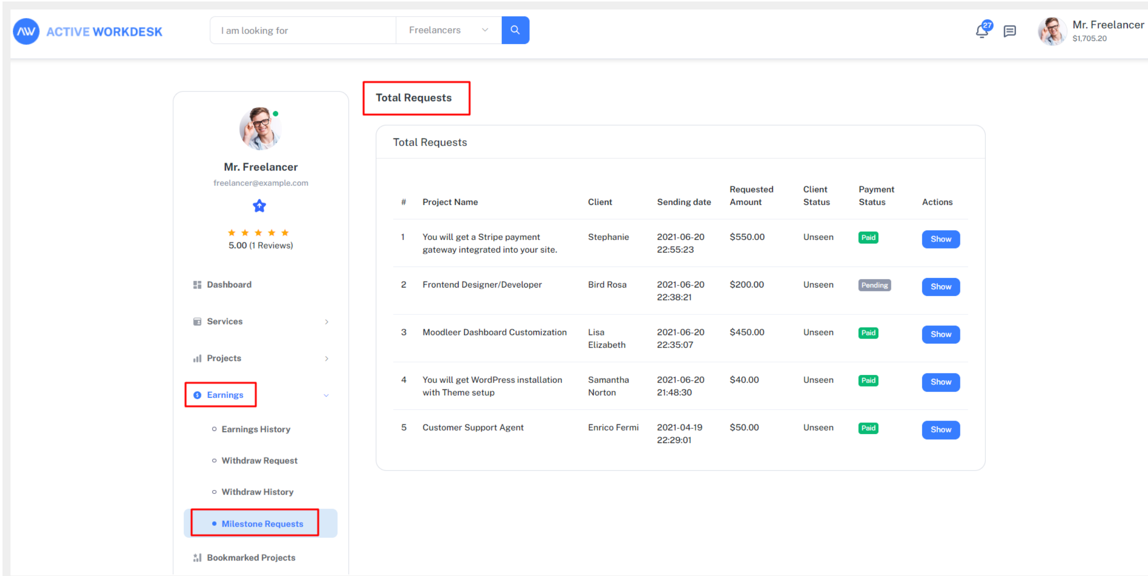


Figure (70a): Freelancer sees all the Milestone requests history

71. How does a freelancer see all the bookmarked projects?

Answer:

To see all of the bookmarked projects the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Bookmarked Projects** menu.

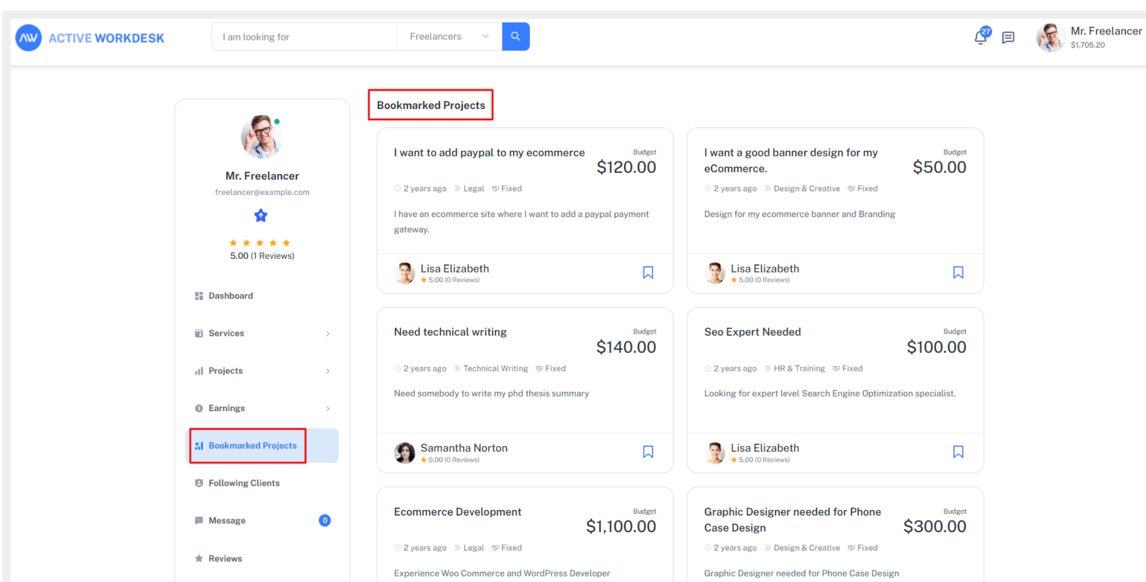


Figure (71a): Freelancer sees all the Bookedmarked projects

72. How does a freelancer see all the following clients?

Answer:

To see all of the bookmarked clients the user has to do the following:

- **Log in** as a **freelancer**.
- Go to the **Following Clients** menu.

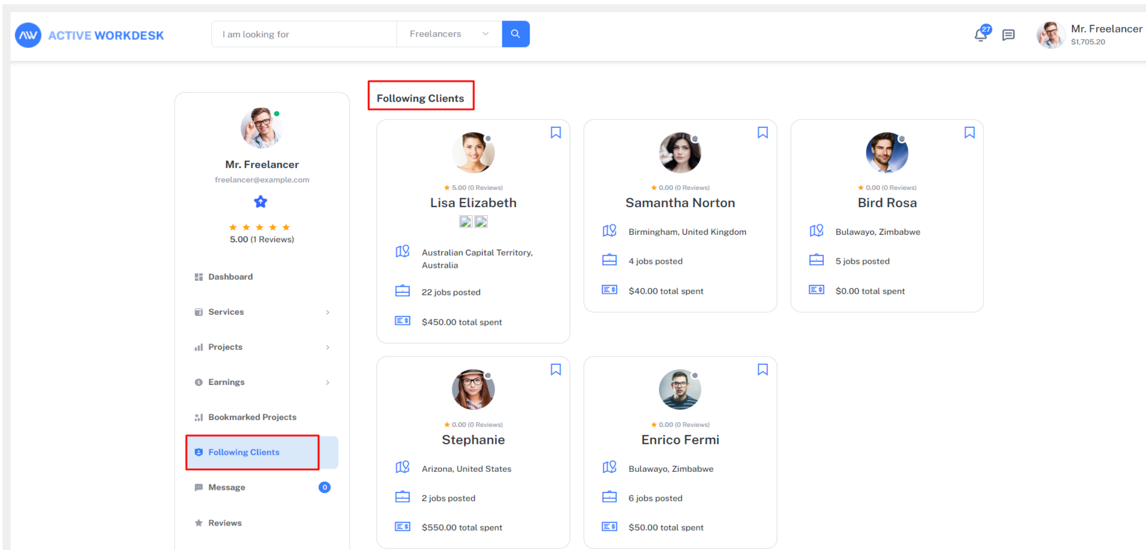


Figure (72a): Freelancer sees all the following client list

73. How does a freelancer chat with his clients?

Answer:

To chat with clients the user has to do the following:

- **Log in** as a **freelancer**.
- Go to the **Message** menu.
- **Select** the **client** to chat with from the client list.
- Type in message inside the message field.
- The user can also attach files to his message.
    - To do that click on the clip button visible at the right side of the message field.
- The user can select multiple files and attach to his/her message.
- Finally, click the **send** icon to send the message.

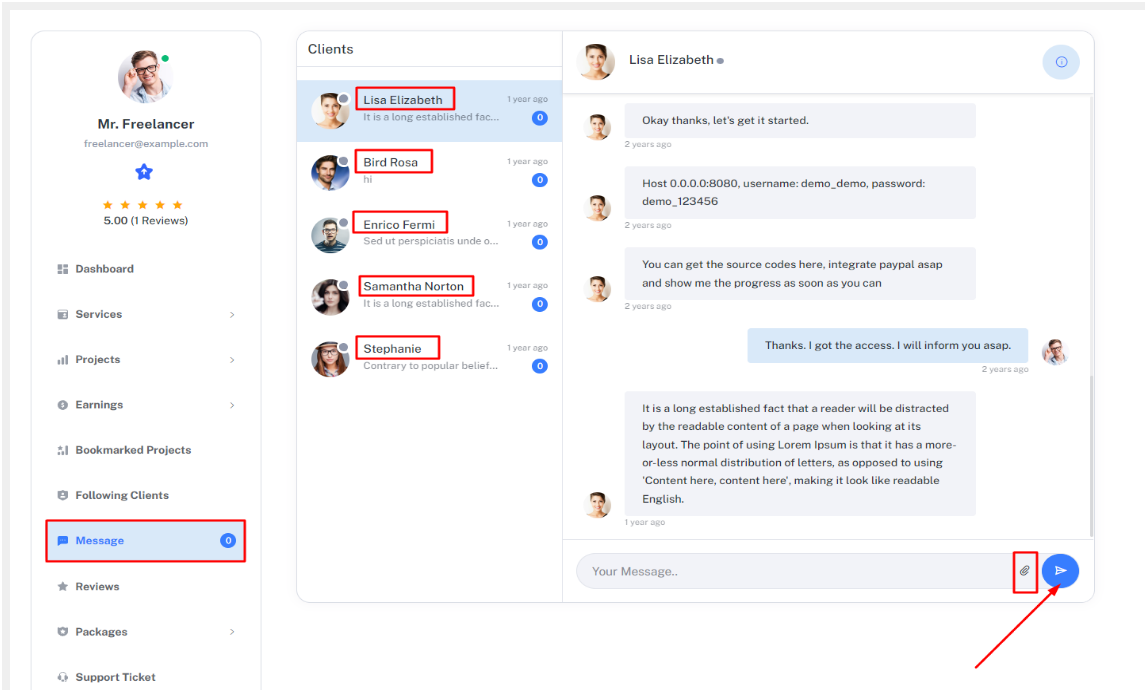


Figure (73a): Freelancer sends a message to any client

74. How does a freelancer see all reviews?

Answer:

To see all of the reviews of the clients the user has to do the following:

- **Log in** as a **freelancer**.
- Go to the **Reviews** menu.
- There the freelancer will be able to read all the reviews made by the clients about his profile.

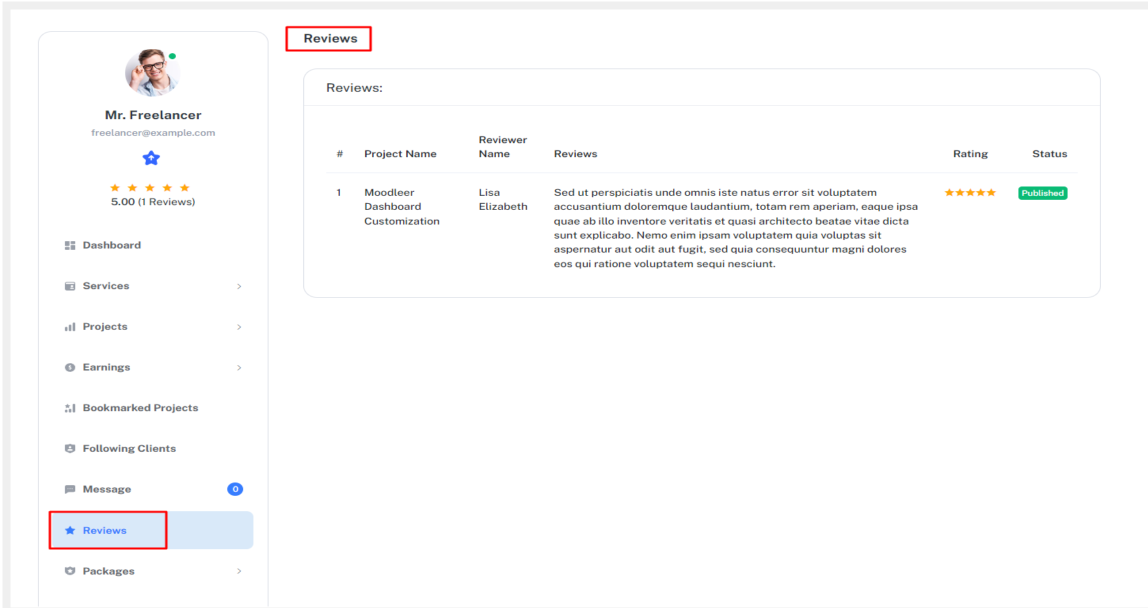


Figure (74a): Freelancer sees all the reviews

75. How does a freelancer bookmark a project?

Answer:

To bookmark a certain project the user has to do the following:

- **Log in** as a **freelancer**.
- Search for a project.
  - To search for a project the user has to type in the name of the project inside the search bar at the top of the page.
  - And then select the project from the dropdown list.
  - Or he/she can search for all projects
  - After that click the **search icon** on the right side of the search field.
  - The **Project listing page** will appear.
  - From there the user will select the desired project by clicking on the name of the project.
- It will take the user to the details of that **project**.
- There at the bottom right corner of the page resides a button that says **Bookmark Project**.
- By clicking that button the user will have bookmarked the desired project.

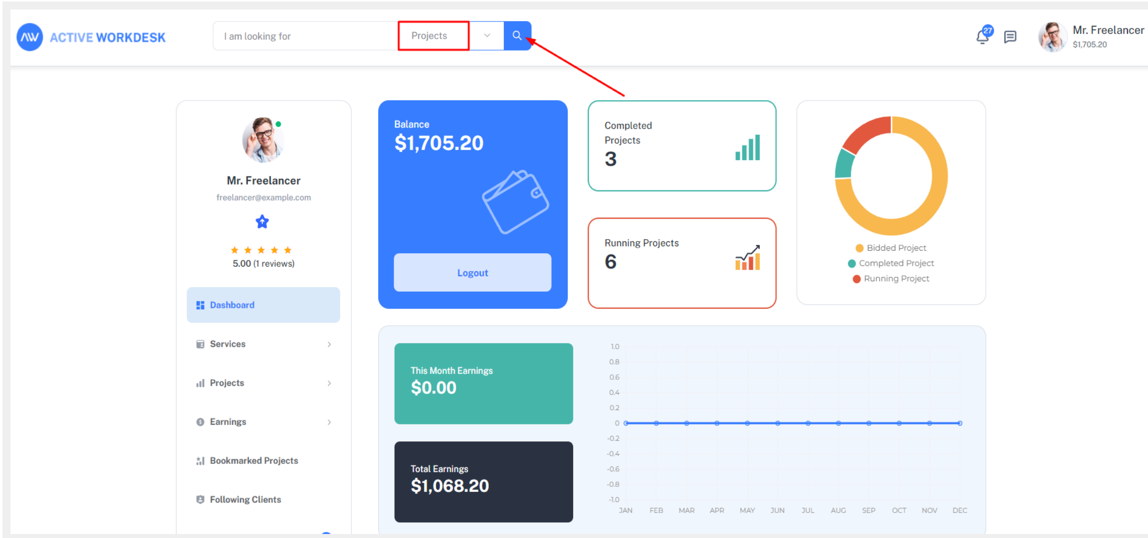


Figure (75a): Freelancer search for projects

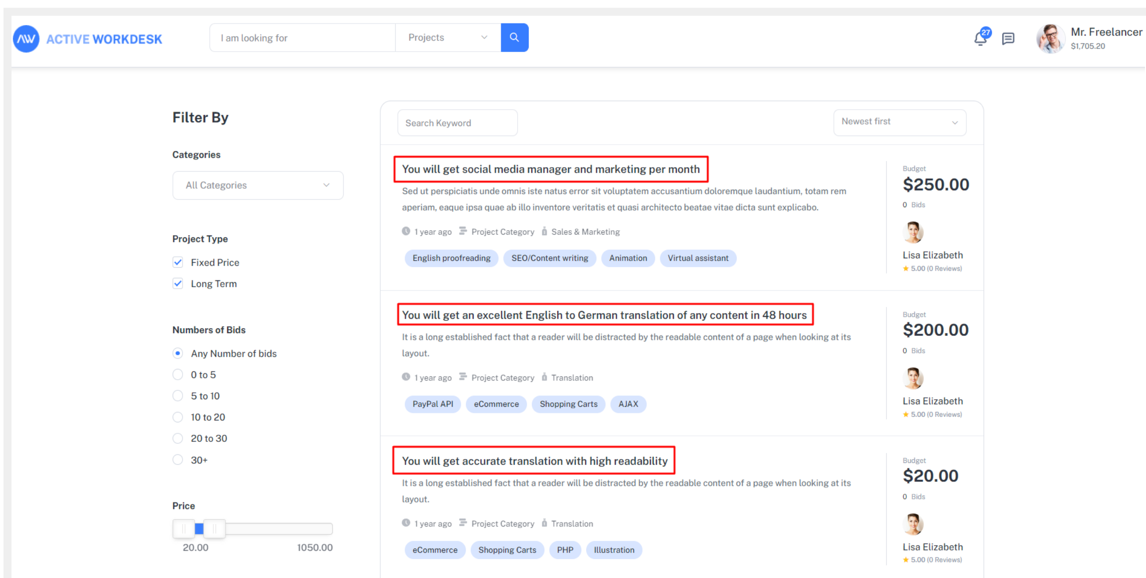


Figure (75b): Freelancer clicks on any project name for project details page

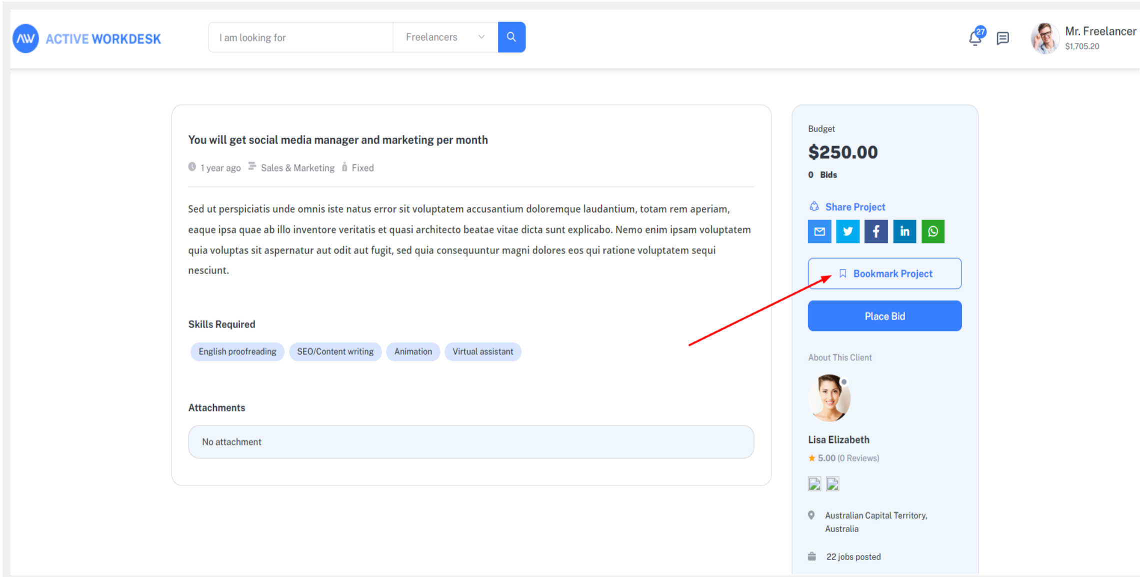


Figure (75c): Freelancer bookmarked a project

76. How does a freelancer set his account?

Answer:

To set freelancer account the user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Setting** > **Account Setting**
- There the freelancer will be able to set up his account with his/hers desired information.

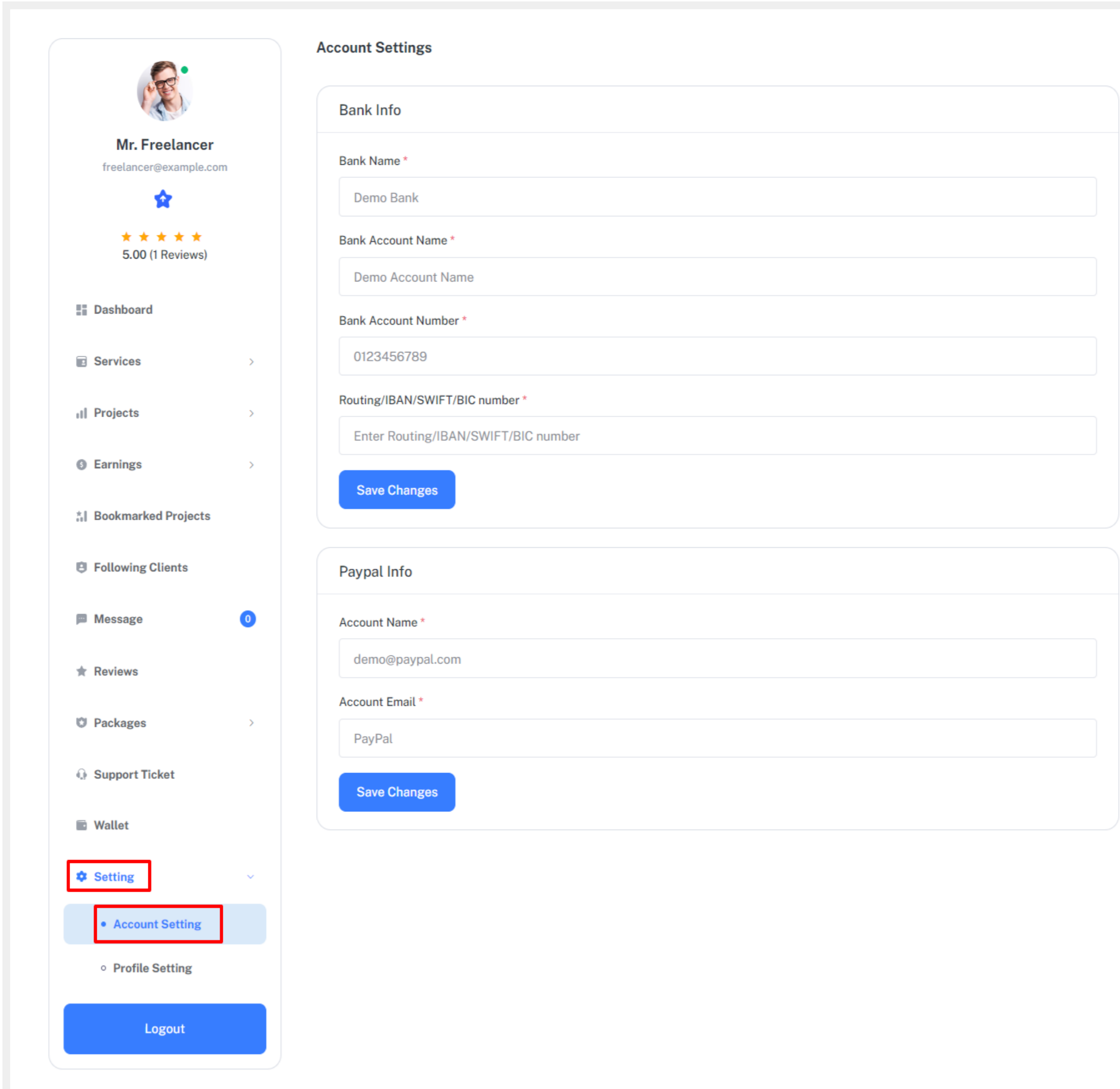


Figure (76a): Freelancer set up his account

77. How does a freelancer rate a client?

Answer:

To rate a client user has to do the following:

- **Log in** as a **freelancer**.
- Go to **Projects** > **Completed**
- There the freelancer will be able to rate particular clients.
- Click the **Rate This Client** button.
- After that a modal will pop up.

- There he will be able to rate the client for the particular project.
- He can **add a reviewing comment** also if he wishes to.
- Finally, click the ‘Rate This Client’ button to finalize the rating.
- If all went well he will be able to see the success message on the bottom-left corner of the screen.

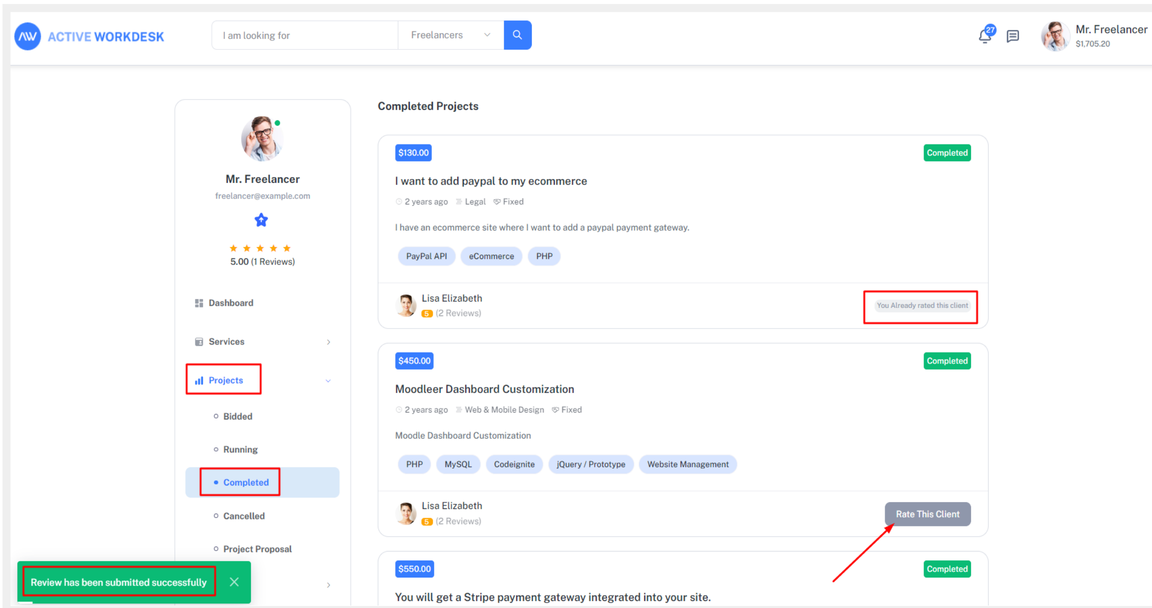


Figure (77a): Freelancer give rating to a client

78. How does a freelancer follow a client?

Answer:

To follow a client user has to do the following:

- **Log in** as a **freelancer**.
- **Search** for a **project**.
- Then click on the **name of the client**.
- At the right sidebar there is the profile picture and name of the client .
- Click on any of them.
- It will take the user to the **client’s profile**.
- There the user will find the **Follow** button
- By clicking on that button the freelancer follows that particular client.

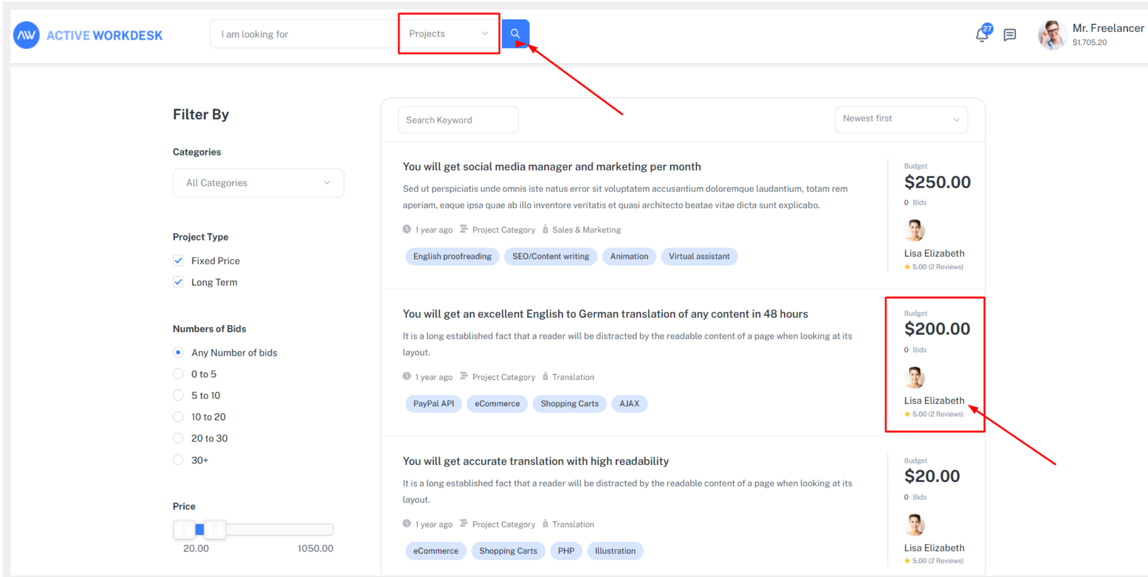


Figure (78a): Freelancer search projects

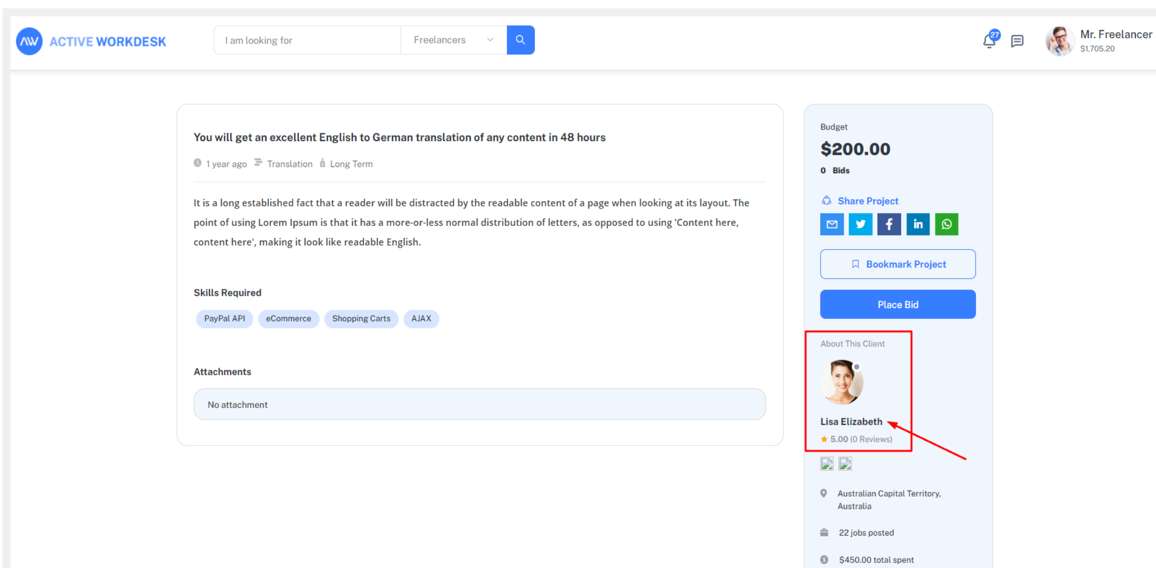


Figure (78b): Freelancer go to a client profile

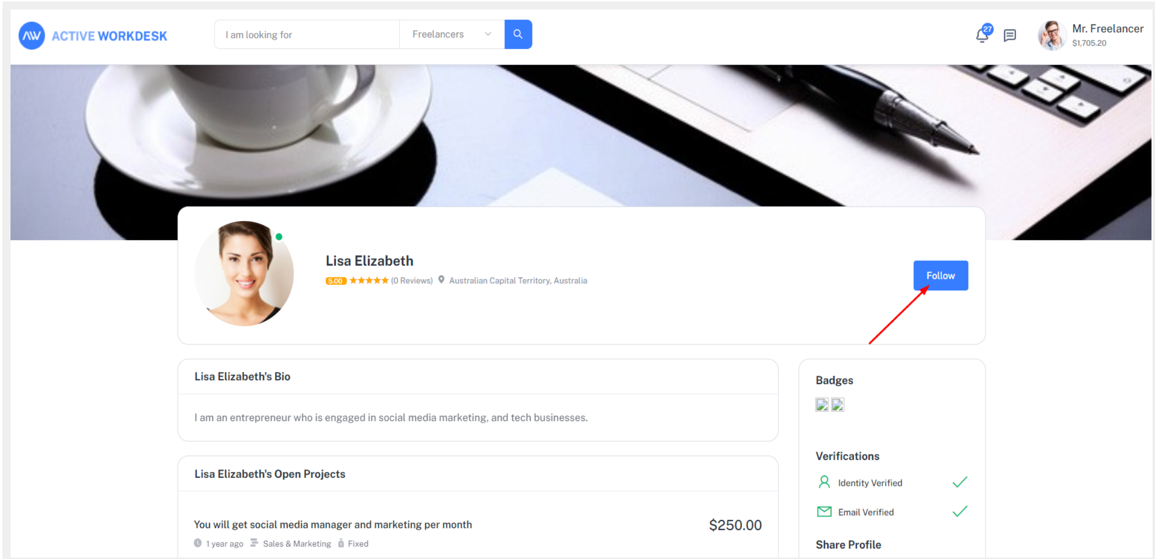


Figure (78c): Freelancer clicks on Follow button

79. How does a freelancer verify his/her identity?

Answer:

To verify his/her identity the freelancer needs to follow the steps mentioned below:

- **Login** as a **freelancer**.
- Go to **Setting** > **Profile Setting**.
- Then **upload** the **pdf file** of his **NID**/**Passport**.
- Then click the **Save Changes** button.
- Finally, he will be able to see if the admin approved his verification request.

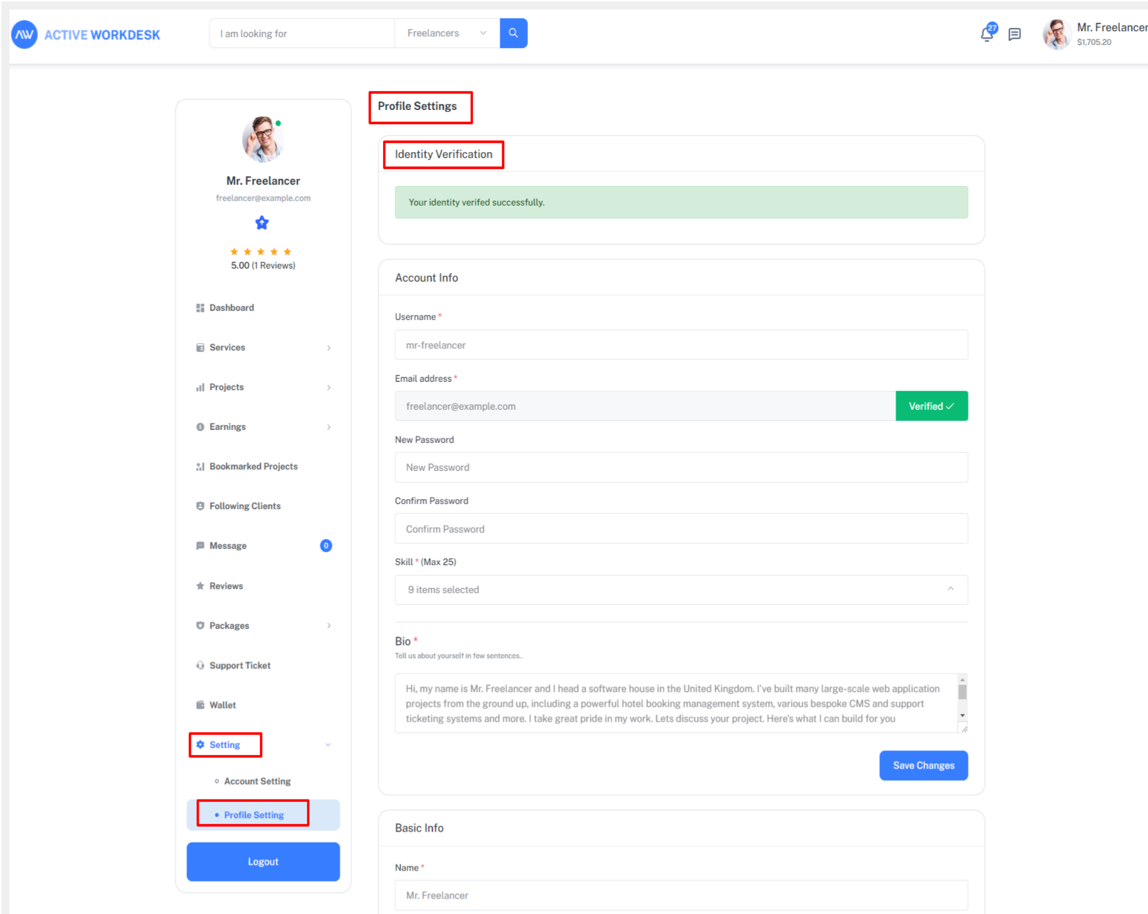


Figure (79a): Freelancer verifies his identity verification

80. How does a freelancer create a new service?

Answer:

For a freelancer to create a new service he/she needs to follow the procedures -

- **Log in** as a **freelancer**
- Then go to **All Services** > **Services**
- He will need to go to that menu and then he or she needs to click on the **Add new service button** visible at the top right corner.
- After clicking the mentioned button he/she will be presented with a **form** which he/she will need to fill up.
- After **filling** up the **form** he/she can create the desired service by clicking the **Post Service**.

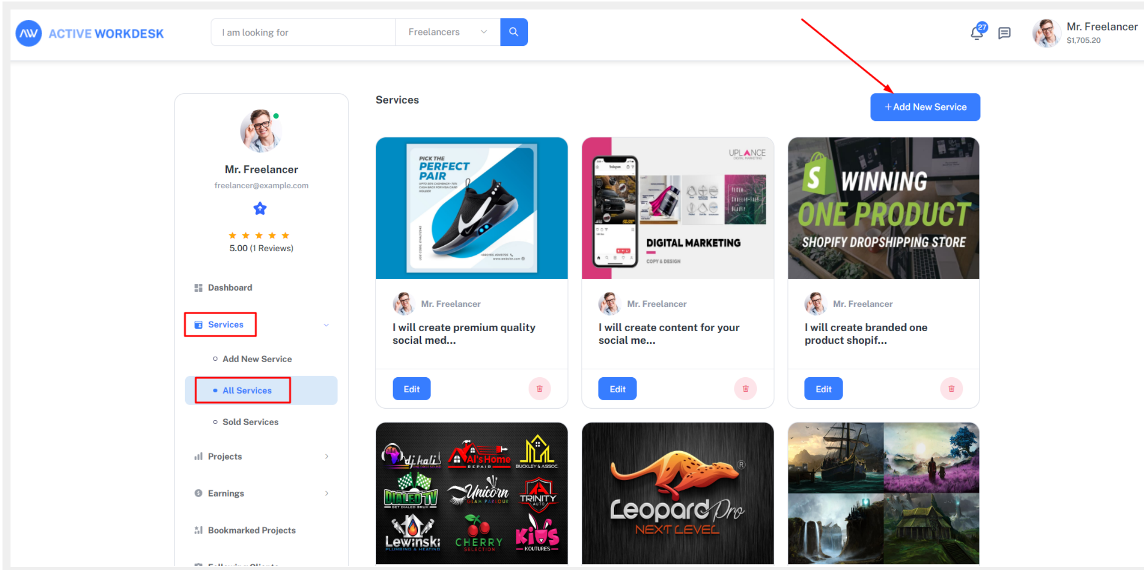


Figure (80a): Freelancer clicks on add new project button

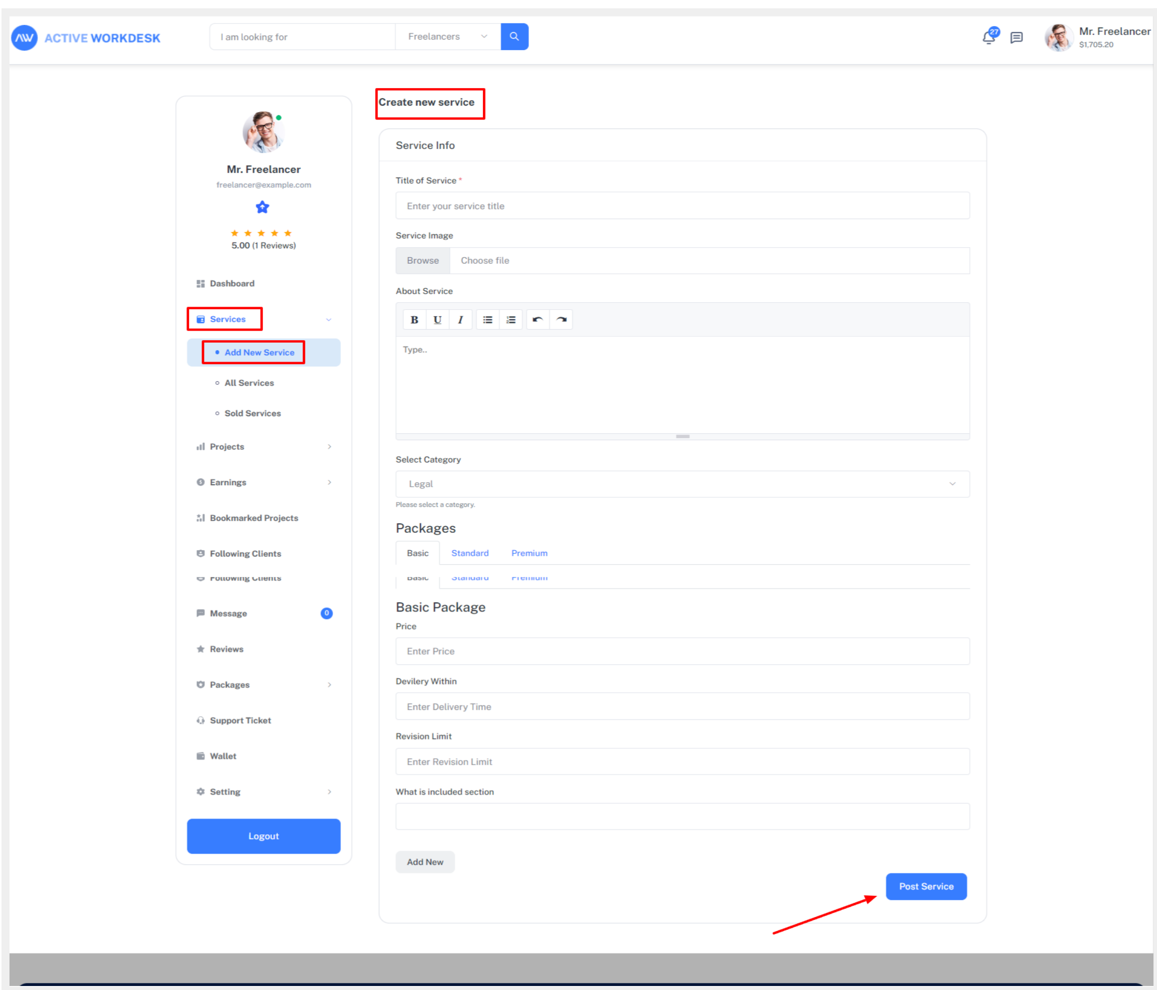


Figure (80b): Freelancer fills up the add new project form

81. **How can a freelancer see all his created services?**

Answer:

Follow the below procedure:

- **Login** as a **freelancer**.
- Then Go to **Services** > **All Services**.

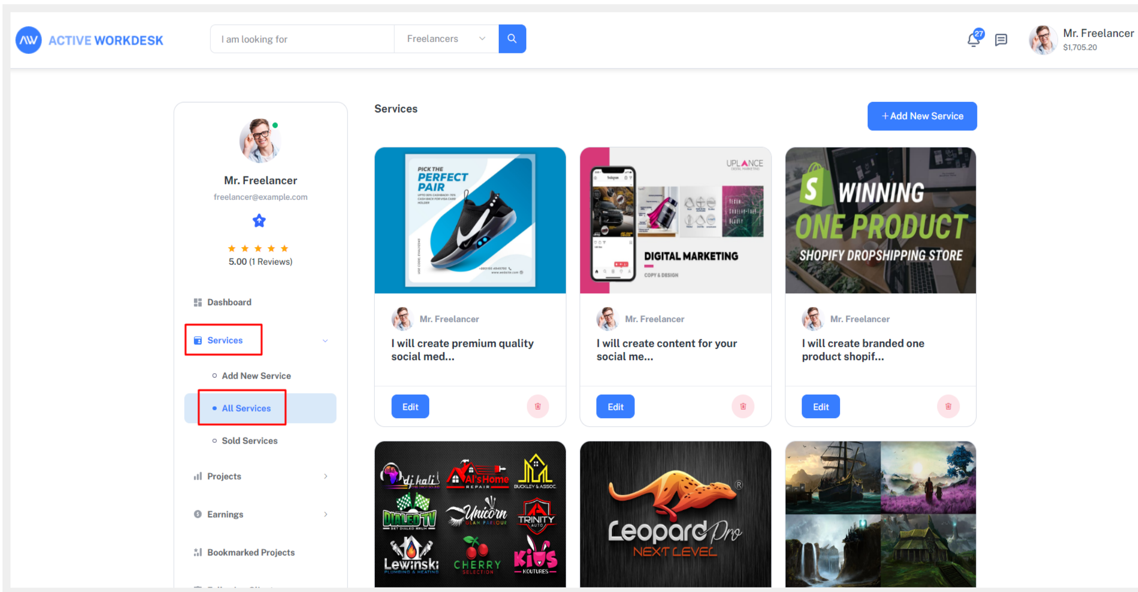


Figure (81a): Freelancer sees all services

82. **How does a freelancer edit his/her created service?**

Answer:

Follow the steps below:

- **Login** as a **freelancer**.
- Then Go to **Services** > **All Services**.
- There at the bottom left corner of each service card there is an **Edit** button. the freelancer will need to click that button.
- After that a form will be generated on clicking the mentioned button. Then the freelancer will be able to save his/her changes.

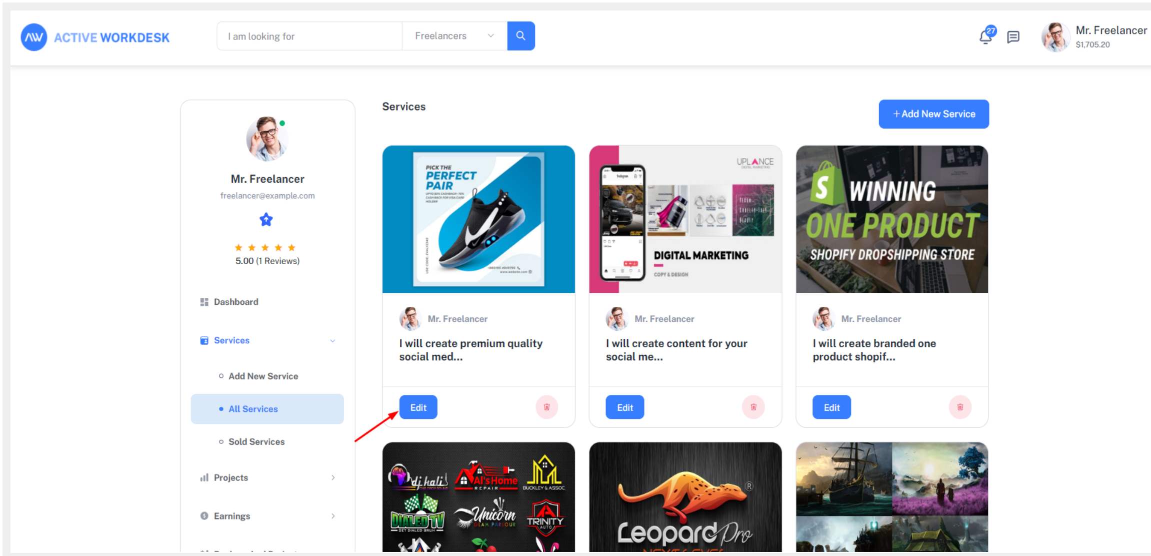


Figure (82a): Freelancer click edit button

83. How does a freelancer view all of his sold services?

Answer:

Follow the below procedure:

- **Login** as a **freelancer**.
- Then Go to **Services** > **Sold Services**.

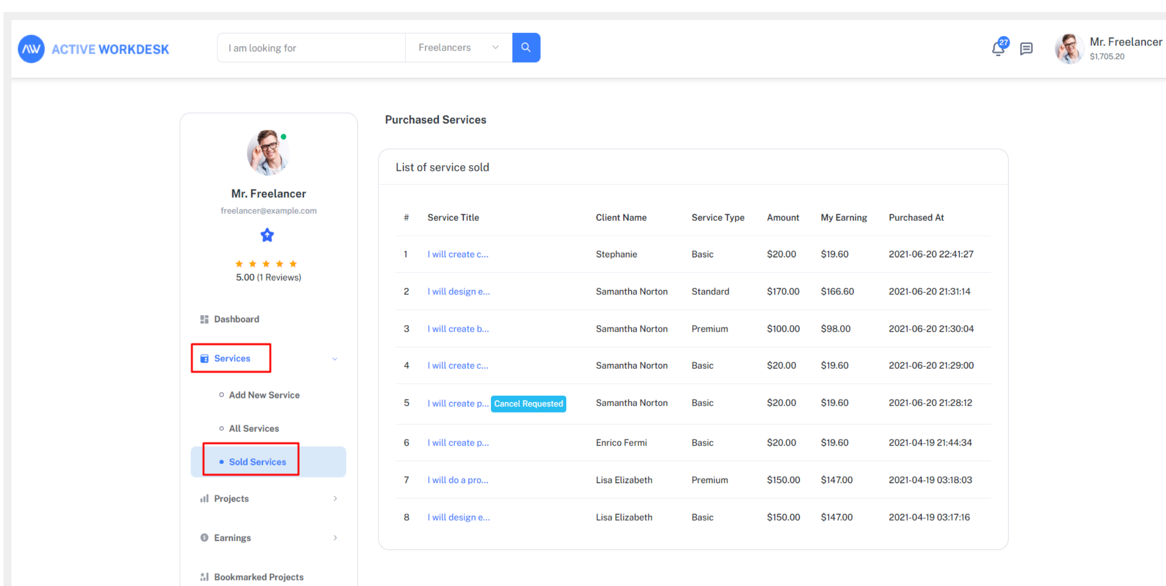


Figure (83a): Freelancer sees sold services