SOW

Monday Oct. 31st, 2023

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**About the Webportal:** It is a marketplace that connects the Agents and the customers. Agents are service providers with expertise in a specific skill or industry with valid licence from the Government agencies; while customers are the end users seeking professional services which these agents provide.

The below document provides the detailed flow/logic for the Service Providers (Agents) and the End users for the marketplace.

**Annual Fee for Service providers, hereafter called Agents:** To work and earn business from the portal an agent will need to register himself by filling a simple registration form and uploading his licences or other important information in-order for the Super-administrator to verify the documents and validity of the license from the Government agencies. A fee of $100 will be charged upfront by the portal which will be valid for 1 year. Upon successful verification of the documents the Super admin will approve the profile of the agent and agent will be able to see published jobs, search relevant jobs and send bids/proposals. (As per the scope – the website will need to be able to verify the agents and the clients)

**Retainer fee:** An agent will be able to bid on published jobs and receive notifications on newly published jobs in real time based on his skill set and criterion set by the agent, like his/her skill set, services provided, locations served, one-time job, recurring job, (project value), Yes please add in project value in filters etc…. and for this the agent will be charged a retainer fee of $1/day with 10% commission of the total project value for each project earned through the portal.

**OR**

$2/day with no commissions on earned jobs. **(Need to review this fee). Why need to review? (VS: With just a fixed fee daily and no commissions the earning potential will be severely affected. For projects of bigger ticket size, you’ll just be making $60 a month and $720/year. My suggestion would be to charge the percentage of commission on the ticket size of the project, where higher the ticket size lower the commission.) We can discuss more details over the call.**

**For End users/Customers:** The portal will be free for customers, which means the end user will not be liable to pay any fees, however; they’ll be asked to fill up a registration form with their details to use the portal. There will be no verification of the customers, but they’ll need to provide/upload their government ID to successfully register. Yes drivers license, passport, A 2 way identification i.e. email and phone number???etc

**Flow of information after Agent login:**

1. After signing into their account, the agent would land on the main page or the home page of the website, where they’ll see all the jobs published by the customers.
2. On top left-hand side of the website, they’ll see their profile icon, upon clicking on to that icon they’ll land on to their profile page, where they’ll see few dashboards, with their total earnings, number of proposals submitted, and clients won. They’ll see a menu on the left-hand side of the screen where they’ll see following items in the menu:
3. **Profile:** On clicking on the profile, they’ll see their personal information, contact details, registered email address, Services provided, locations served, their registered address, and Sign-out.
4. **Submitted Proposals:** On clicking this tab in the menu, the agent will see a list of proposals submitted in the last 30 days Why 30 days?. Agents will be able to edit the proposal but then the proposal would show: **“Edited”. Not sure what you mean? If I have put the word “Edited” on the scope it probably means that they can edit certain things within their dashboard i.e. Profile pic, etc. (VS: We can discuss this on the call, I’ll explain you what I meant. I was referring to editing a submitted proposal. In this case we’ll need to retain the old copy to refer at a later date in case of a dispute. We can discuss it in details over a call.)**
5. **Active jobs:** On this tab the agent will see a list of all the jobs won, which are active.
6. **Completed jobs:** This tab will show all the jobs which are complete and have been ended by the client or the agent and show the reviews and ratings given to the agent by the customer.
7. **My Earnings:** This tab would show the total earnings for each contract for a month. Agents will have the flexibility to apply filters and see the earnings for a custom date range. **Please note: This can only be tracked if the contracts are fixed price and are awarded only via the portal. After the contract is awarded, we can reveal the contact details of the customer and the agent with each other. How can contracts not be a fixed price? The client is going to want to know how much an agent will charge. (VS: Yes, while writing the scope, I had in mind that the customer would have the flexibility to put a range on his budget, however; I believe that we should not give that flexibility to the customer but allow the agents to send their proposals with price based on the requirements. The challenge here is that to view total earnings, the payment needs to be done via the portal and for a milestone-based project where payment is done on a recurring basis, either weekly or monthly, this information will be available. Since you wanted to allow customers to pay outside the portal then showing the monthly earnings for the agents will be difficult). There is another work-around where we can allow the customers to publish their budget for the job, this would help the agents save time as they’ll only go through those job descriptions where they feel the client has budget to afford them. We can discuss more on a quick call.**
8. **Notifications tab:** This tab would show up all the notifications about messages from prospective clients. Message from Super Admin about upcoming renewals or a request for proposal from a client.

**Flow of information after Customer login:**

1. After Signing up on the portal the customer will land on the home page of the website, where they’ll see a Search tab with filter options as per the skillset they’re looking for and few more filters like: Best match as per the skill set, most highly rated and locations served. Also on the home page will be a tab that would say “Post a job”. Upon clicking on Post a Job a form would pop-up and the user will be able to key in all the details about the job. After keying in all the details on the job, the customer will be able to either save as draft or publish the job. The job once published will be visible on the portal to all the agents. Remember that clients can choose between public and their favourites list. (VS: Yes, I missed out that point. It can be done.)
2. **Agent’s search results:** The customer will see a list of the most highly rated agents for the week or month for different categories scrolling from right to left. This monthly or weekly rating would keep the agents motivated to provide good services. Great idea
3. **Profile Tab:** The customers will see a Profile icon with the initials of their First and Last names. Upon clicking on the profile tab, they’ll be routed to their profile section where they’ll see “Profile” menu on the left-hand side and dashboards on the remainder of the page. On the dashboards we can show jobs posted, Active jobs, RFP invites sent to agents, favourite agents/agencies, proposals received.
4. **Notifications Tab:** There will be a notifications tab on the top right-hand side of the portal which would show all the notifications, like: Proposal received, Job published, Contract started, Ratings and Reviews, etc…
5. **Reviews and Ratings:** After a job successfully complete, the customer will be able to share their reviews and rate the agent/agency for each individual contract/job.

**The super Admin portal:** The Super Admin would have complete rights of the portal and will act as the moderator of the portal. Super Admin will be able to perform the following activities:

1. Super admin will be able to view the total number of agents and customers on the platform.
2. Super admin will have the rights to approve or disapprove the profile of an agent.
3. Super admin will be able to view the earnings of each agent from the portal.
4. Super admin will be able to add/modify or delete the profiles or any agent or customer if there is a policy violation.
5. Super admin will be able to add/modify/delete any information or categories on the website.
6. Super admin will be able to see the reviews and ratings of each agent and customers.
7. Super admin will be able to change the commission percentage, or the annual and monthly fee charged from the agents at any time.

You’ve made some great points in the above info; please keep I mind that the scope I sent you is still incomplete and I’m hoping to finish it within the next coming months (crazy time of year at the mo). The finished scope will be used as a tick list in our contract when the website is completed – so please don’t skip on anything.

Many thanks

Talk soon