

RFQ Plugin Documentation

Installation:

Make sure that Woocommerce has been installed and activated before installing the RFQ for Wordpress plugin.

Download the 'RFQ for Wordpress' plugin zip file from your 'My Account' download page or via the e-mail you have received after your purchase.

Then go to your site, to the plugin page. Select 'Add new' and 'Upload new plugin'. Then select the zip file that you have just downloaded. Activate the plugin.

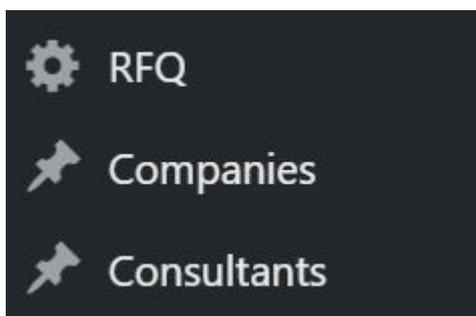
It will ask for a license code, which you will have received via the e-mail.

Enter the license code, and now you're good to go!

When activated, the RFQ for Wordpress plugin will create following pages:

1. Company registration page
2. Consultant registration page
3. Login page
4. Company dashboard
5. Consultant dashboard with:

It will also add 3 new menu items to your admin dashboard:



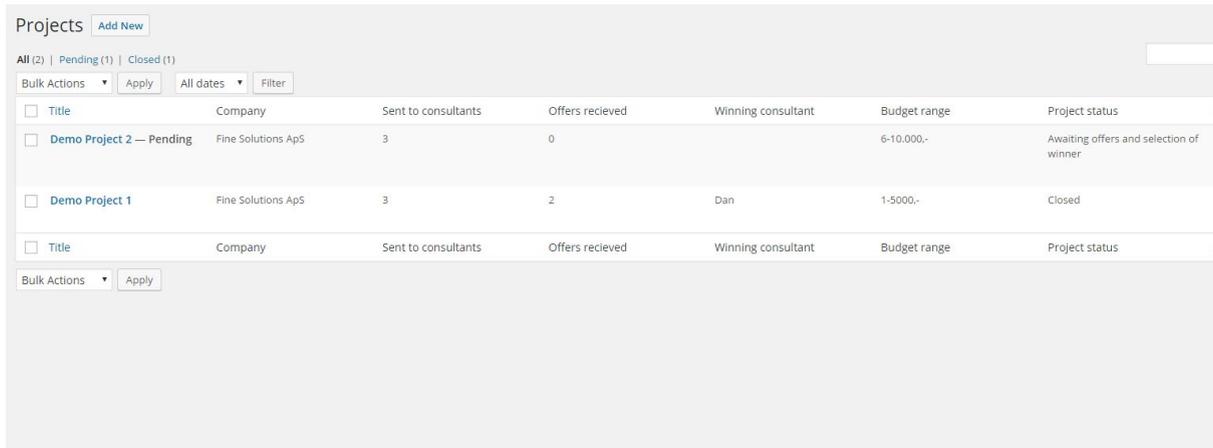
RFQ:

Projects:

Here you will see a list of all the projects created

As admin you will be able to see info about the request, as well as bids and the winner. Each project will have one of these statuses:

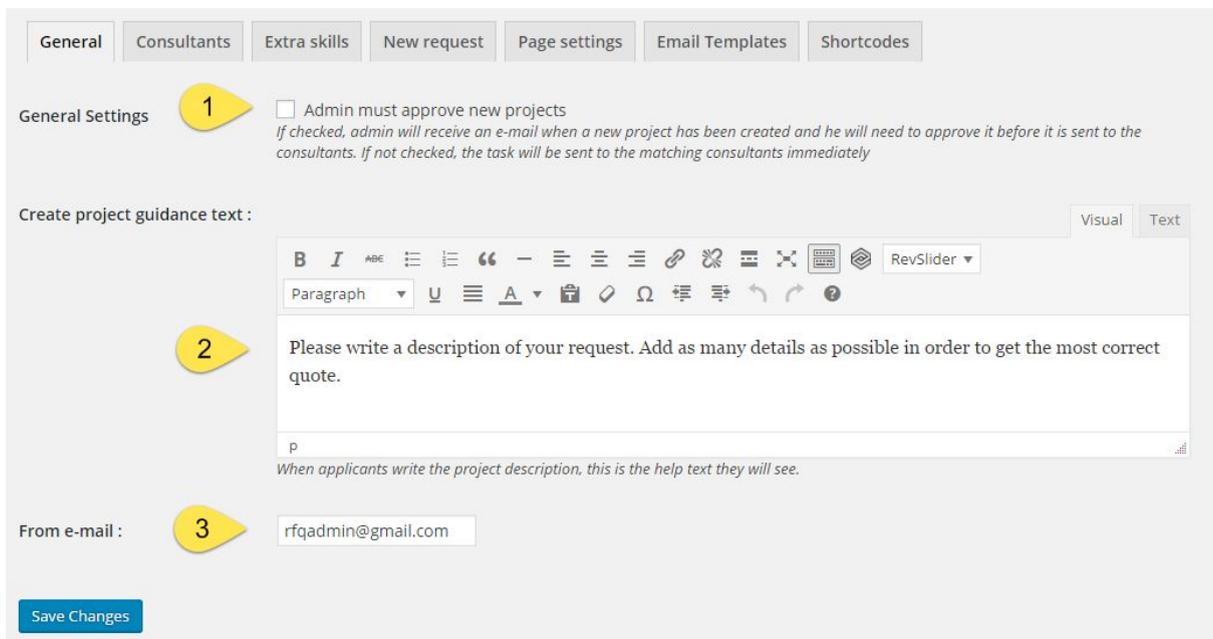
- Awaiting approval from admin (when this is selected in the settings)
- Awaiting offers and selection of winner (when project has been sent to matching consultants)
- Closed (When the company has selected a winner)



<input type="checkbox"/>	Title	Company	Sent to consultants	Offers received	Winning consultant	Budget range	Project status
<input type="checkbox"/>	Demo Project 2 — Pending	Fine Solutions ApS	3	0		6-10.000,-	Awaiting offers and selection of winner
<input type="checkbox"/>	Demo Project 1	Fine Solutions ApS	3	2	Dan	1-5000,-	Closed
<input type="checkbox"/>	Title	Company	Sent to consultants	Offers received	Winning consultant	Budget range	Project status

Settings:

The 'General' tab:



General | Consultants | Extra skills | New request | Page settings | Email Templates | Shortcodes

General Settings 1 Admin must approve new projects
If checked, admin will receive an e-mail when a new project has been created and he will need to approve it before it is sent to the consultants. If not checked, the task will be sent to the matching consultants immediately

Create project guidance text : Visual Text

2 **B I ABC** [List icons] [Quote icon] [Link icon] [Table icon] [RevSlider] [Paragraph] [Underline] [Text color] [Image icon] [Link icon] [Undo] [Redo]

Please write a description of your request. Add as many details as possible in order to get the most correct quote.

When applicants write the project description, this is the help text they will see.

From e-mail : 3

Save Changes

1. Here, admin decides whether newly created request should be sent directly to the matching consultants, or if admin himself wants to approve the requests before they are sent.

2. When the company creates a request, he will write a description. Here, admin can write a bit of guidance for the company. The company will see this text in frontend, when he creates the request.

3. This is the admin e-mail address, from which e-mail to companies and consultants are sent.

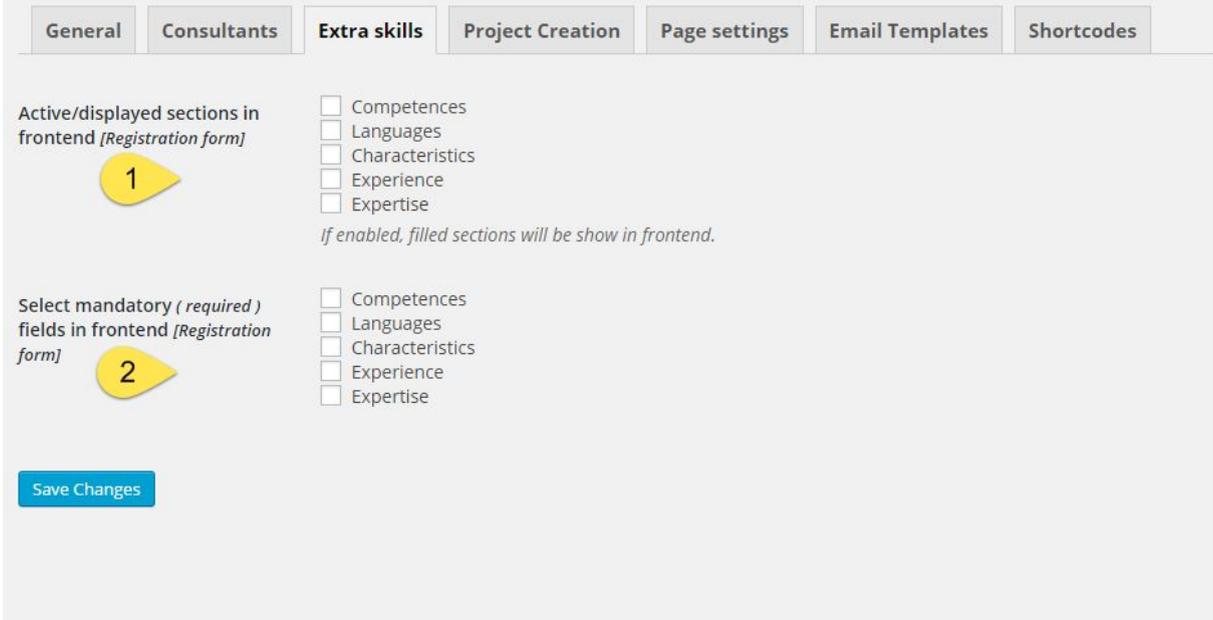
The 'Consultants' tab:

General	Consultants	Extra skills	Project Creation	Page settings	Email Templates	Shortcodes
Active/displayed sections in frontend [Registration form]						
1						
<input checked="" type="checkbox"/> Education and work experience						
<input checked="" type="checkbox"/> Work skills						
<input checked="" type="checkbox"/> Work area places						
<input checked="" type="checkbox"/> Work area industry <i>If enabled, filled sections will be show in frontend.</i>						
Select mandatory (required) fields in frontend [Registration form]						
2						
<input type="checkbox"/> Company Name						
<input checked="" type="checkbox"/> First name (Required)						
<input checked="" type="checkbox"/> Last name (Required)						
<input type="checkbox"/> Homepage						
<input type="checkbox"/> Mobile phone						
<input checked="" type="checkbox"/> Address 1						
<input type="checkbox"/> Address 2						
<input checked="" type="checkbox"/> Postcode						
<input checked="" type="checkbox"/> City						
<input checked="" type="checkbox"/> Country						
<input type="checkbox"/> About yourself						
<input type="checkbox"/> Experience from year						
<input type="checkbox"/> Experience to year						
<input type="checkbox"/> Experience industry						
<input type="checkbox"/> Experience company						
<input type="checkbox"/> Experience position						
<input type="checkbox"/> Experience more information						
<input type="checkbox"/> Education Type 1						
<input type="checkbox"/> Finished in year						
<input type="checkbox"/> Education Type 2						
<input type="checkbox"/> Finished in year						
<input type="checkbox"/> Education Type 3						
<input type="checkbox"/> Finished in year						
<input type="checkbox"/> Certifications and Courses						
<input type="checkbox"/> Area						
<input type="checkbox"/> Industry						

1. These are the 4 available sections that can be displayed in frontend, when a consultant registers. Here, admin decides which sections he wants to be displayed in frontend.

2. Here, all the available fields in the 4 sections are listed. Admin must select which he wants to display.

The 'Extra skills' tab:



The screenshot shows a configuration interface with several tabs: General, Consultants, Extra skills, Project Creation, Page settings, Email Templates, and Shortcodes. The 'Extra skills' tab is active. It contains two sections:

- Active/displayed sections in frontend [Registration form]**: A yellow callout bubble with the number '1' points to this section. It lists five skills with checkboxes: Competences, Languages, Characteristics, Experience, and Expertise. Below the list is the text: *If enabled, filled sections will be show in frontend.*
- Select mandatory (required) fields in frontend [Registration form]**: A yellow callout bubble with the number '2' points to this section. It lists the same five skills with checkboxes.

At the bottom left of the configuration area is a blue button labeled 'Save Changes'.

1. These are the extra skills for the consultant, that admin has created in backend. Here, admin must decide which ones to display when a consultant registers.

2. Here, admin must check the extra skills that must be mandatory for the consultant to fill out.

The 'Project creation' tab:

General	Consultants	Extra skills	New request	Page settings	Email Templates	Shortcodes
Show / Hide sections in frontend <i>[Create new project form]</i>						
<input type="checkbox"/> Project authorized						
1 <input checked="" type="checkbox"/> Project category						
<input checked="" type="checkbox"/> Project work area						
<input checked="" type="checkbox"/> Budget range <i>If enabled, filled sections will be show in frontend.</i>						
Required skills <i>[Create new project form]</i>						
2 <input type="checkbox"/> Languages						
<input type="checkbox"/> Characteristics						
<input type="checkbox"/> Expertise						
<input checked="" type="checkbox"/> How high can you jump? (custom skill) <i>If enabled, filled sections will be show in frontend.</i>						
For Danish companies						
3 <input type="checkbox"/> Get company info from CVR-registret <i>If enabled, CVR number and P number will be show in frontend.</i>						
<input type="button" value="Save Changes"/>						

1. These are the fields that are available, when a company creates a new request. So here, admin must check the fields/selections he wants available, when a company creates a new request.

By default, the project category, work area and budget range are checked..

If you check the 'Project authorized' checkbox, the company will see radio button in frontend and must choose whether he will only accept offers from authorized consultants.

If not checked, this selection will not be displayed.

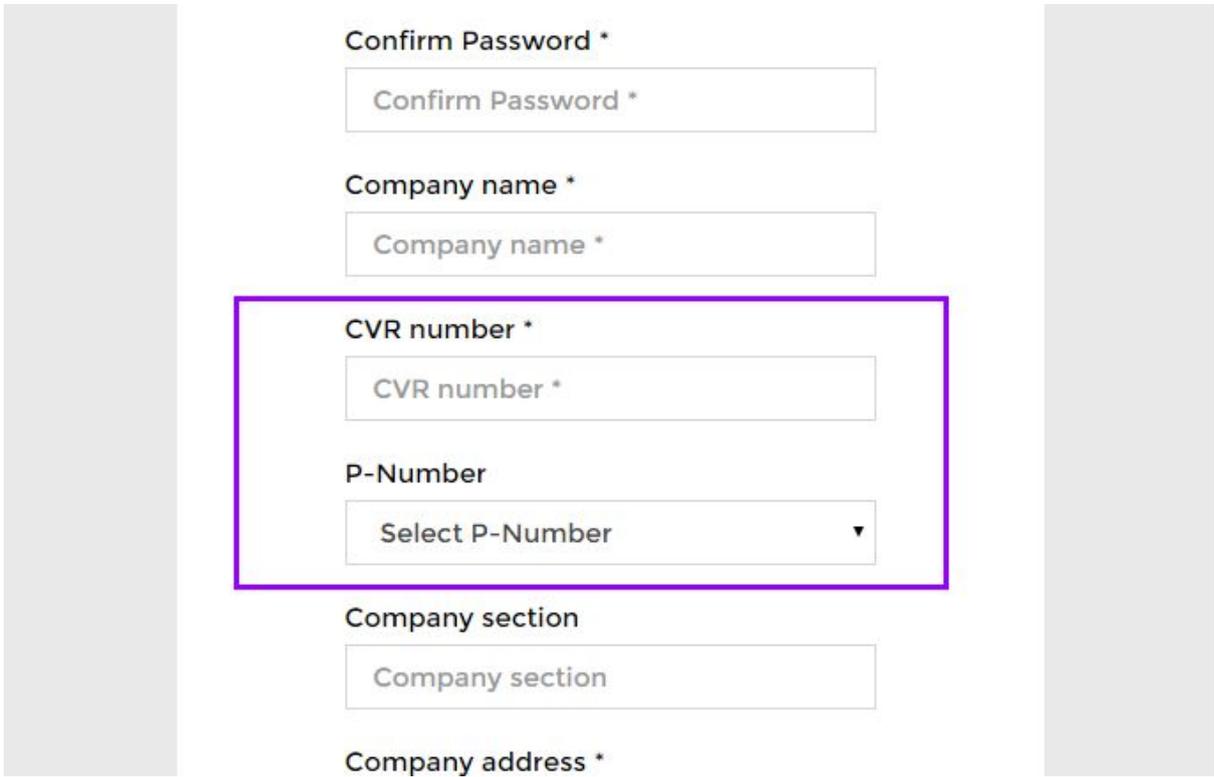
2. These are the consultant's extra skills. Here you can check, that some of these extra skills must be displayed, when a company creates a project.

For example, you have asked all consultants to fill out the extra skill 'language', and now, when a company creates a request, the company can select, that the request must only be sent to consultants who speaks French. In order to do this, the 'Languages' extra skill must be checked in this tab.

3. This setting only applies for Danish sites. When checked, the system will search in the CVR-register for company name/CVR number and fill out the rest of the company information.

**The 'Budget Range' is a deprecated function and is no longer displayed*

This is how it will look in frontend, when the information will be collected centrally:



The image shows a registration form with the following fields:

- Confirm Password *
- Company name *
- CVR number *** (highlighted with a purple box)
- P-Number** (highlighted with a purple box)
- Company section
- Company address *

The 'Pages' tab:

When activated, the Companies & Consultants plugin will create following pages.:

1. Company registration page
2. Consultant registration page
3. Login page
4. Company dashboard
5. Consultant dashboard

You can then use these pages in your menu to get the structure that you wish.

The 'E-mails' tab:

Here, you can modify all the e-mails that are sent.

These are the e-mails, that are sent automatically:

1. Admin - when a new request has been created.

2. Company - confirmation when the company has created a request
3. Consultants - when a new request has been created, which matches their skills
4. Company - information, when a consultant has made a bid
5. Consultants - information to the consultants that lost a request
6. Consultant - information to the consultant who won a request
7. Company - when the company has selected a winner and the request will be marked as finished
8. Consultant - when the consultant try to make a bid but has no store credit.

The 'Shortcodes' tab:

The functionalities are also available via these shortcodes:

Consultant registration: [consultant_registration]
 Company registration: [rfq_company_registration]
 Consultant's dashboard: [rfq_consultant_dashboard]
 Company's dashboard: [rfq_project_dashboard]
 Store credit list (for consultants): [rfq_user_credits_list]
 Login page for companies as well as consultants: [rfq_login]

Companies:

Here, all the created companies will be listed.

By clicking on a company name admin will also be able to see additional information about the companies.

Admin is also able to create companies directly from backend.

The screenshot shows the WordPress admin interface for editing a company. The main content area is titled 'Company Details' and contains a form with the following fields and values:

E-mail	togitester10@gmail.com
Username	togitester10@gmail.com
password	*****
Company name	The Best Company
VAT Number	245321515
Address	Test adresse
Zip code	7000
City	City
Phone	12121212
Contact person name	Simon Says
Contact person phone	32325325

On the right side, there is a 'Publish' sidebar with the following information:

- Status: Published [Edit](#)
- Visibility: Public [Edit](#)
- Published on: Jan 5, 2016 @ 22:00 [Edit](#)
- Buttons: [Move to Trash](#) and [Update](#)

Consultants:

This is a user list of the companies.

Here, admin will also be able to see and edit additional information about the consultants, such as skills.

Admin is also able to create consultants directly from backend.

The screenshot displays the 'Edit Consultant' interface. At the top, there's a title 'Edit Consultant' with an 'Add New' button. Below the title, the name 'Sarah' is entered in a text field. A permalink is shown as <http://togidata2.togidata.dk/wp-test/consultants/test-company-sarah-jacobsen/> with an 'Edit' button. The main content area is titled 'Consultants Details' and contains a 'Personal Details' section with the following fields:

E-mail	togitester1@gmail.com
Username	togitester1@gmail.com
password	*****
First Name	Sarah
Last name	Jacobsen
Homepage	www.testcompany.com
Mobile no	11223344
Company Name	Test company

On the right side, there's a 'Publish' section with a 'Preview Changes' button. Below it, the status is 'Published' with an 'Edit' link. The visibility is set to 'Public' with an 'Edit' link. The published date is 'Jan 5, 2016 @ 21:56' with an 'Edit' link. At the bottom of the publish section, there are two buttons: 'Move to Trash' and 'Update'.

Company dashboard:

When you have registered as a company, you will see the company dashboard. From here, you can create projects and see all incoming offers for your projects. This is also where you select a winner.

PROJECTS DASHBOARD

YOU ARE LOGGED IN AS FINE SOLUTIONS APS
LOGOUT

[Edit profile](#) [Add new project](#)

Project : Demo Project 2

Offers received	Comment	Offer price	Select winner
No offers received yet			

Project : Demo Project 1

Offers received	Comment	Offer price	Select winner
The Best Company	I am your guy! I have a lot of experience in this area and am available right away.	4.500	
City Consultants A/S	I have a lot of experience in exactly that area and I hope to hear from you.	4.200	

Consultant dashboard:

When you have registered as a consultant, you will see the consultant dashboard. Here, you will see a list of the projects matching your qualifications. My clicking 'make a bid', you will be able to bid on a project.

CONSULTANT DASHBOARD

YOU ARE LOGGED IN AS DAN
LOGOUT

[Edit profile](#)

Projects	Project description	Budget range	Offer price	Status	Action
Demo Project 2	Consultant needed for a project concerning construction of 8 apartments.	6-10.000,-			Make an offer
Demo Project 1	We are looking for an architect for a new project in East New York, etc...	1-5000,-	4.200	Win	

**The 'Budget Range' is a deprecated function and is no longer displayed.*