Yo!Gigs

Getting Started (Admin)

-Version 3.2-

Yo!Gigs

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Getting Started Guide

Once you purchase the product, you will be provided with a platform that is blank (no information in any field and list) or that has the FATbit dummy content (depending on the option you selected during the platform installation).

Before you can publish your platform and begin business, you are required to set up the platform via the admin panel.

Setting up includes updating all your business details, updating the main settings, configuring all the required third-party APIs, and creating the information required for clients and freelancers to join the platform.

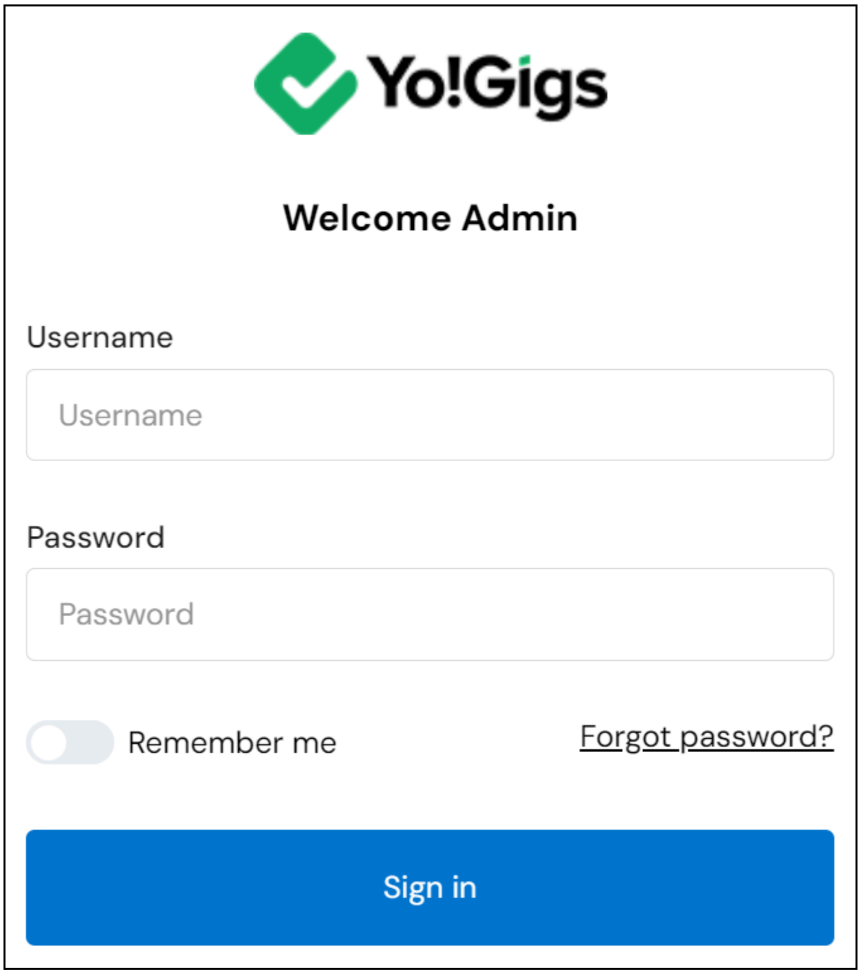
This step by step guide will help you with everything you need, to get started with the Yo!Gigs platform.

1. Log in to the platform

Open a web browser and in the address field, type in your platform's URL followed by the path /admin to access the login page.

For instance, *if your platform's name is Yo!Gigs, and the domain URL is demo.yo-gigs.com, your platform's admin panel login page URL will be https://demo.yo-gigs.com/admin.*

The login form will appear.



Fill in the fields with your credentials (provided after you purchase the product):

- **Username*:** Enter your username.
- **Password*:** Enter your password.
- **Remember me:** Turn on this toggle switch to enable the system to remember you.

  When this feature is activated, if you close the window without signing out, the next time you come back, you will be signed in again automatically.

  Leave this **off** or turn it **off** to disable this feature.

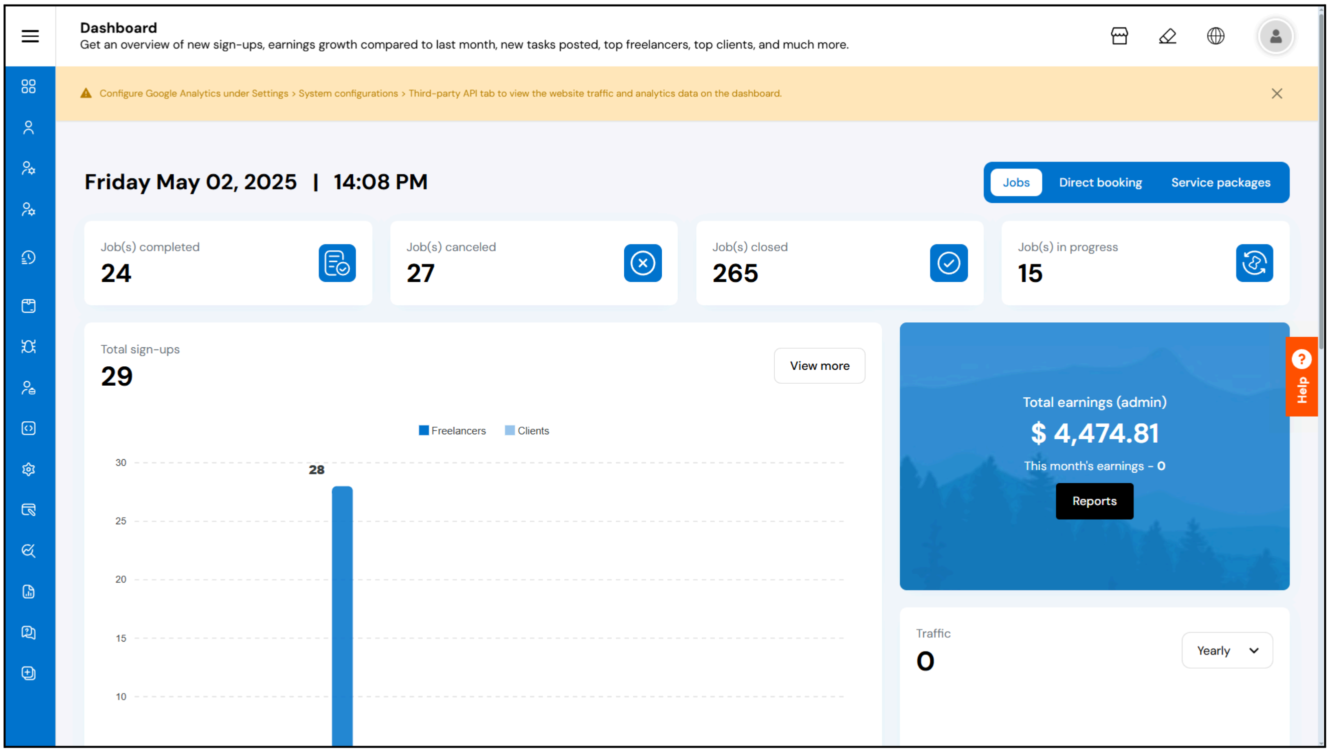
  ! *Do not turn on the **Remember me** toggle switch, if you are logging in on a public or shared computer. Also, it is advised to not turn this on when signing in through computers you don't use often and cannot lock to protect your browser.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*This feature is only visible if it has been activated under the **Settings > System configurations > Remember me** tab.*

Once done, click **Sign in.**

This will direct you to the admin dashboard.



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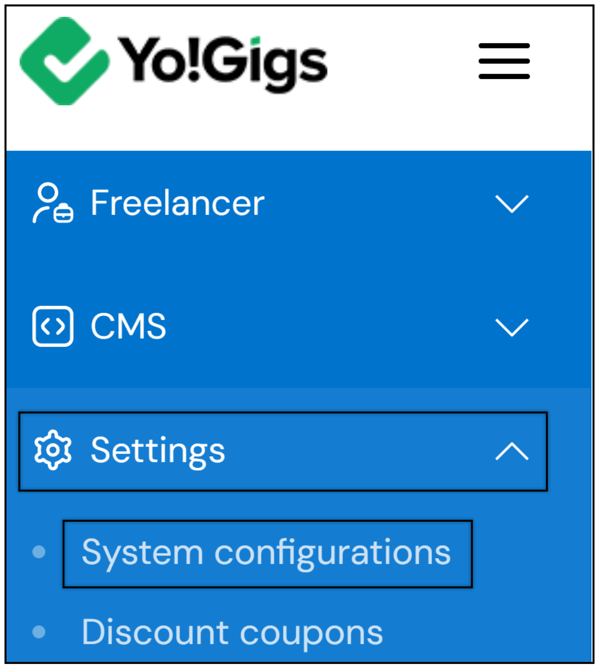
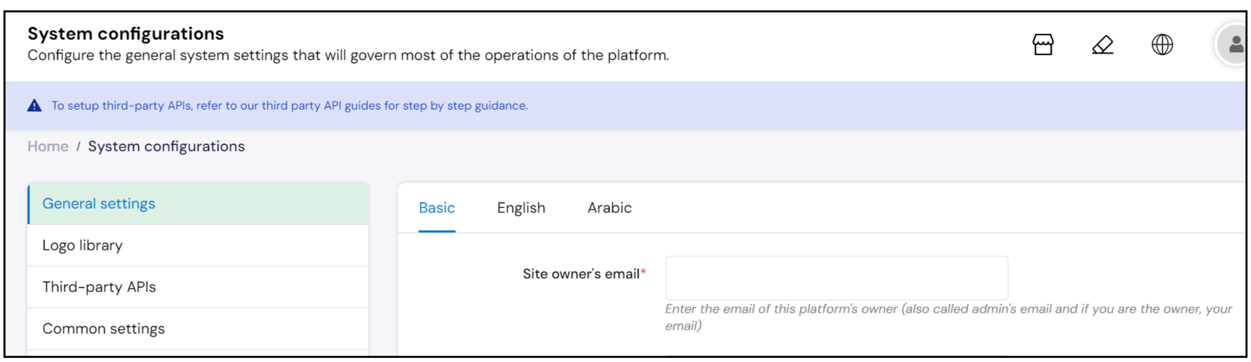
2. Go to System configurations

Hover over the **hamburger menu button** to reveal the vertical navigation bar. Then, go to **Settings** and select **System configurations**.



This will direct you to the **System configurations** page, which allows you to update several general configuration settings of the website.



On the left-side of the screen, there is a vertical navigation panel, listing all the system configuration categories.

Select the settings you want to update from the vertical tab section and the respective form will appear on the right-side panel.

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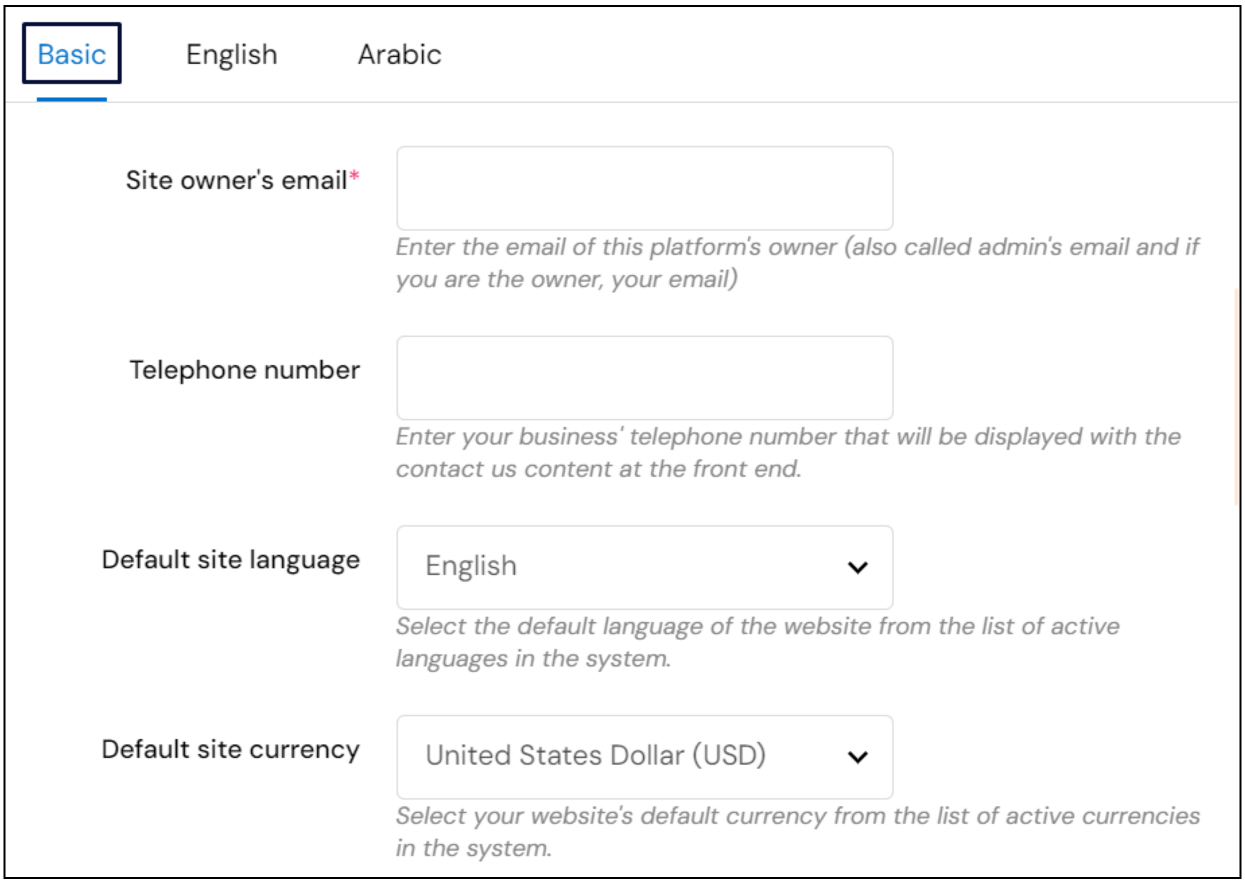
3. Update the General settings > Basic tab

Update the **General settings,** which includes updating your business profile details. This form opens by default when you open the **System configurations** page.

There are multiple tabs under this form.

The very first tab is the **Basic** tab, followed by the default language **(English)** tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.



Update the following:

- **Site owner's email:** Enter/update the business email address. This information is displayed on the contact us page.
- **Telephone number:** Enter your business telephone number.

  This number will be displayed on the contact us page, and the home page footer.

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- **Default site language:** Select the default language of the website.

  To do this, click the field and select the language from the dropdown list.

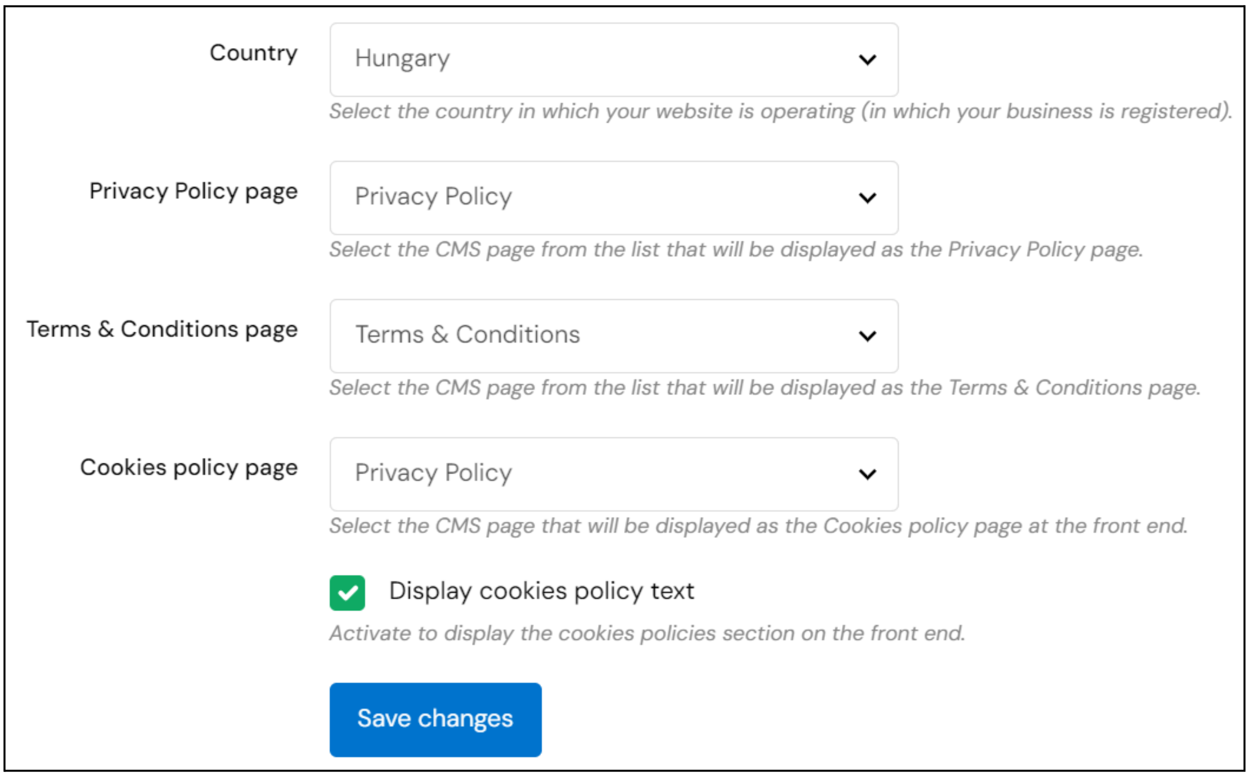
  The dropdown list will have only those languages that have been added and activated on the platform (the ones you purchase when purchasing the platform). To add more languages, contact the support team.

- **Default site currency:** Select the default currency of the website.

  To do this, click the field and select the currency from the dropdown list.

  *Manage the list of currencies under **Settings > System currencies**.*

Scroll down to update the next fields.



- **Country:** Select the country in which your business is registered.

  To do this, click the field and a dropdown list with all the countries will appear.

  Choose accordingly.

  *Manage the list of countries under **User preferences > Countries**.*

- **Privacy Policy page:** Select the content page to be displayed as the **Privacy Policy** page from the dropdown list. Click the field and a list of options appear.

*The pages provided as options in the dropdown list can be created under **CMS > Content pages**.*

- **Terms & Conditions page:** Select the content page to be displayed on the Terms & Conditions page from the dropdown list. Click the field and a list of options appear.

  *The pages provided as options in the dropdown list can be created under **CMS > Content pages**.*

- **Cookies policy page:** Select the content page to be displayed as the Cookies Policy page from the dropdown list. Click the field and a list of options appear.

  This page will be displayed when someone clicks on the Cookies Policy link provided at the front end with the Accept Cookies pop-up.

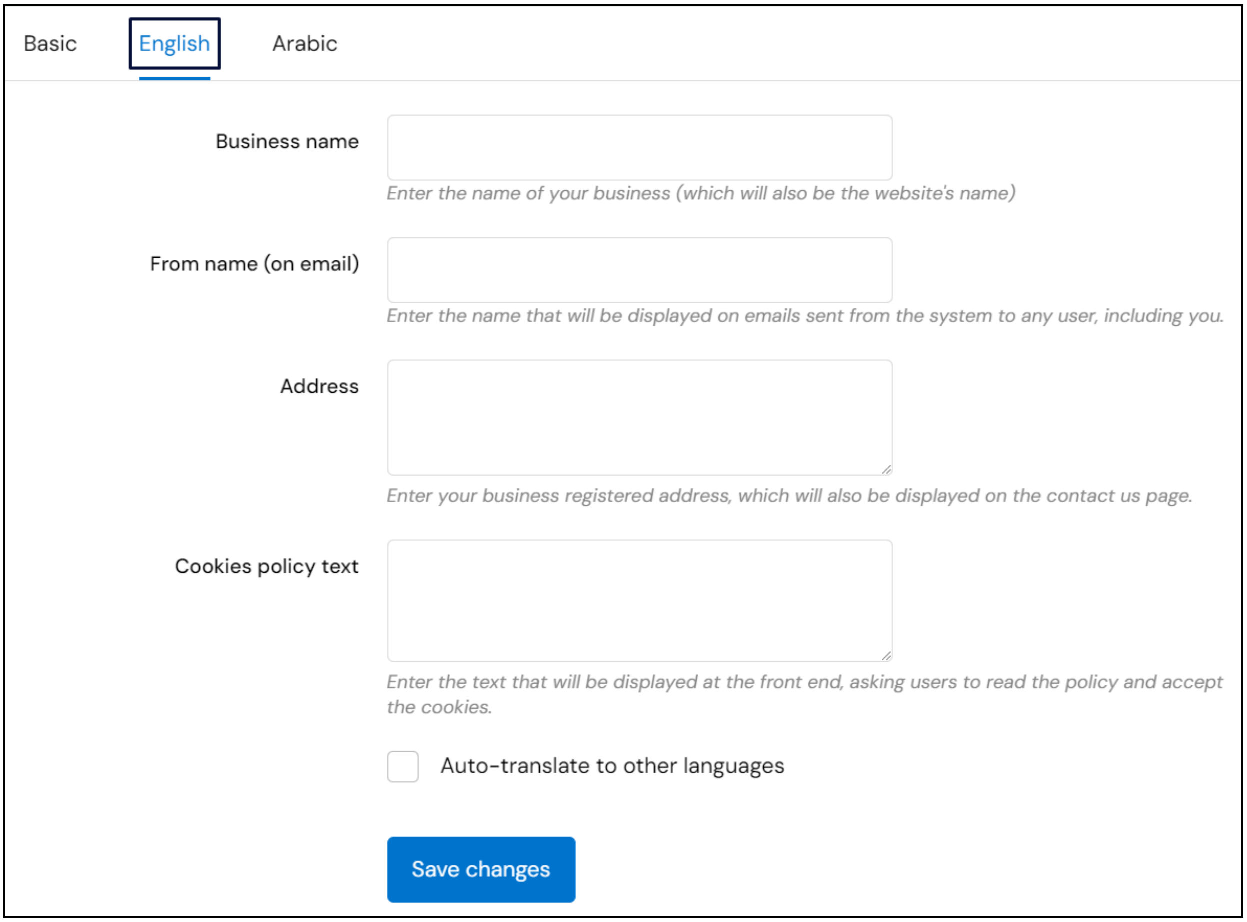
  *The pages provided as options in the dropdown list can be created under **CMS > Content pages**.*

- **Display cookies policy text:** Check mark this to display the cookies policy section at the front end.

Click **Save changes** to update everything.

4. Update the General settings > English tab

Click **English** to go to the default language data tab (English tab, since **English** is set as the default language).



Update the following:

- **Business name:** Enter the name of the business. This name will be displayed in many places on the platform.
- **From name (on email):** Enter the name (sender's name) that will be used with the email sent from the platform to any user.
- **Address:** Enter your registered business address.
- **Cookies policy text:** Add the text that will be displayed with the Cookies Policy link asking the users to Accept the Cookies or set their cookie preferences.

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- **Auto-translate to other languages:** Check mark this to update the secondary language data automatically. With this, the data under the secondary language data tab(s) gets auto-filled.

  ! *This option is visible only when the* ***Microsoft Translator API*** *feature under* ***Settings > System Configurations >*** *[Third-Party API](#) has been configured.*

  Leave this as it is to fill the secondary language data on your own (since there is only one secondary language - Arabic - there is only one tab next).

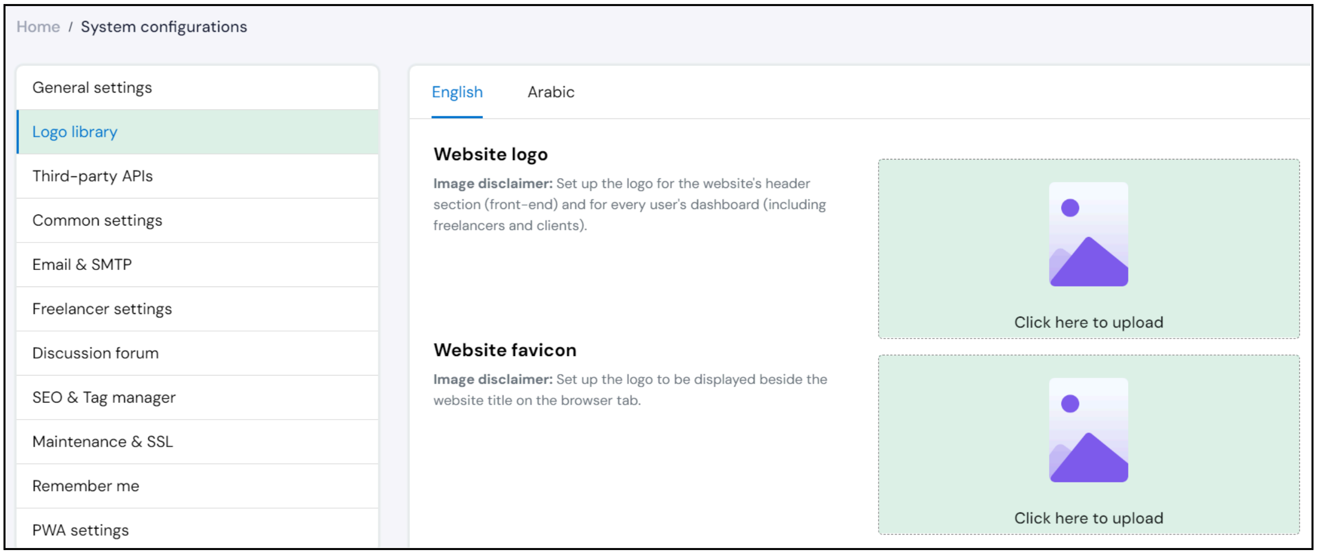
Click **Save changes**.

The next tabs after this are the secondary language tab (for example, Arabic) and will all have the same fields (as in the English tab). You can edit the details for this language and save it, or simply use the ***Auto-translate*** *option (at the bottom of the form), click* ***Save changes*** *and move on.*

However, you can also skip the secondary language data tab (if you do not want to fill it out at the moment or do not find it important), and simply fill in the data of the default language tab (English tab), click ***Save changes****, and move to the next step.*

5. Update the Logo library

Go to the Logo **library**, to update the website's logo and favicon.



- **Website logo:** Upload the business logo. This will be displayed on every section of the platform.

  To upload it, hover over the **Click here to upload** field, and click it.

Select the image from your system and upload it.

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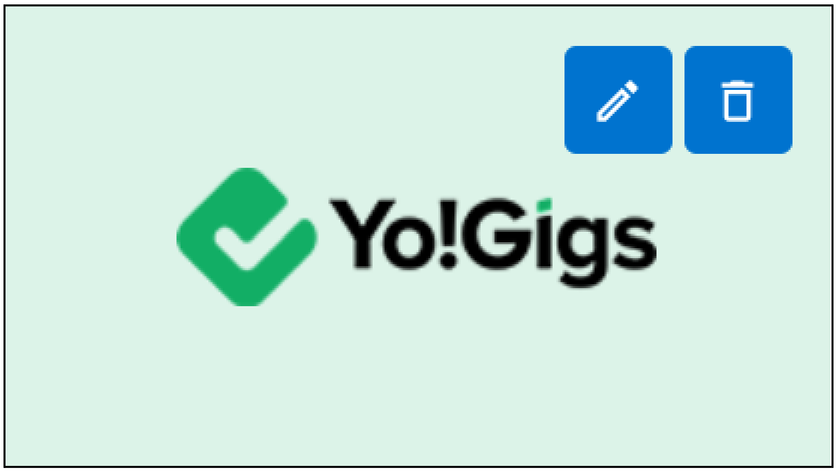


To edit the image (change it), click the **edit button** on the upper-right corner of the image section. Select the image from the system and upload it.

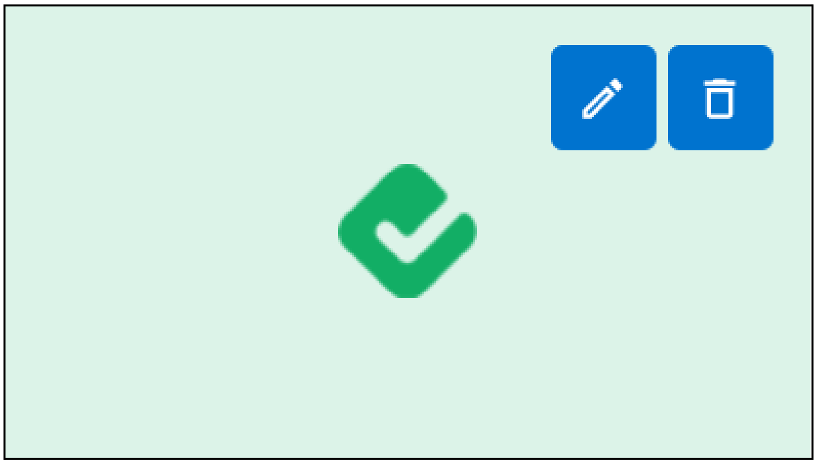
To delete the image, click the **delete button** on the upper-right corner of the image section.

- **Website favicon:** Upload a website favicon image to be displayed beside the website title on the browser tab.

  A favicon is a graphic image (icon) associated with a particular web page and/or website.

  To upload it, hover over the **Click here to upload** field, and click it.

Select the image from your system and upload it.



To edit the image (change it), click the **edit button** on the upper-right corner of the image section. Select the image from the system and upload it.

To delete the image, click the **delete button** on the upper-right corner of the image section.

Images are uploaded directly on the platform, hence, there is no **Save changes** button under this form.

Upload the images for the other languages as well by visiting the respective language tab.

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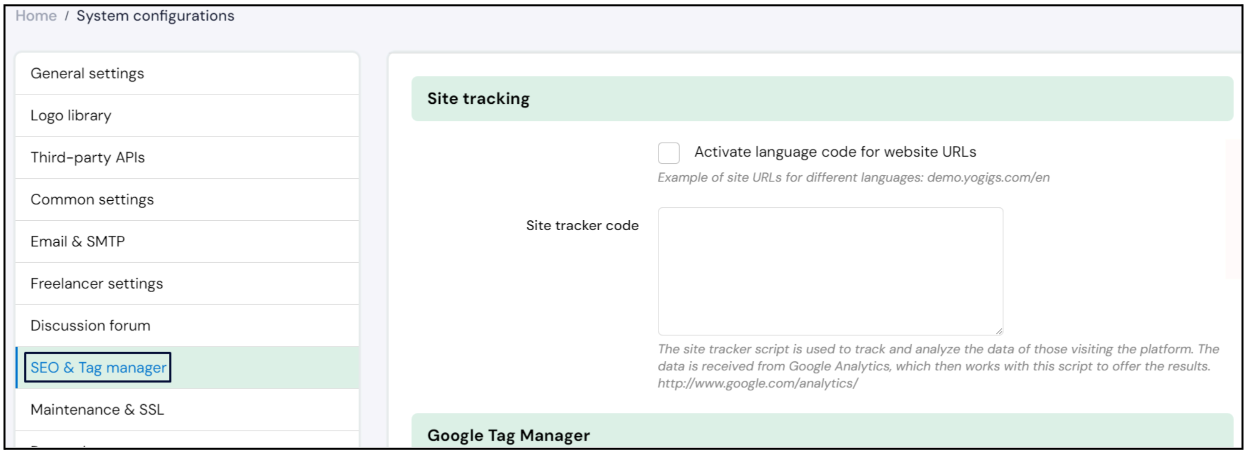
6. Update the SEO & Tag manager tab

Go to **SEO & Tag manager** to add the site tracker code, which is important for the GA4 API to work.

This tab also allows you to update the Google Tag Manager details and some other settings, that help with the SEO of the platform.



*You DO NOT have to update all the third-party APIs under this section. Update only those third-party APIs that you need and then click **Save changes**.*

This form is divided into two sections. Scroll down to view each section and update it accordingly:

6.1 Site tracking

A tracking code is a small snippet of code that is usually implemented as JavaScript in the HTML source code of a website.

These lines of code allow you to analyze the flow of visitors to the platform and the activities of users. This site tracker code can be obtained from the Google Analytics (GA) platform.

This code is important for Google Analytics to track the platform. However, it is different from the Google Analytics API.

The Google Analytics API is completely dependent on the site tracking code, and will work only if you have added the site tracking code under this section and then configured the GA API under the [Third-party APIs tab](#).

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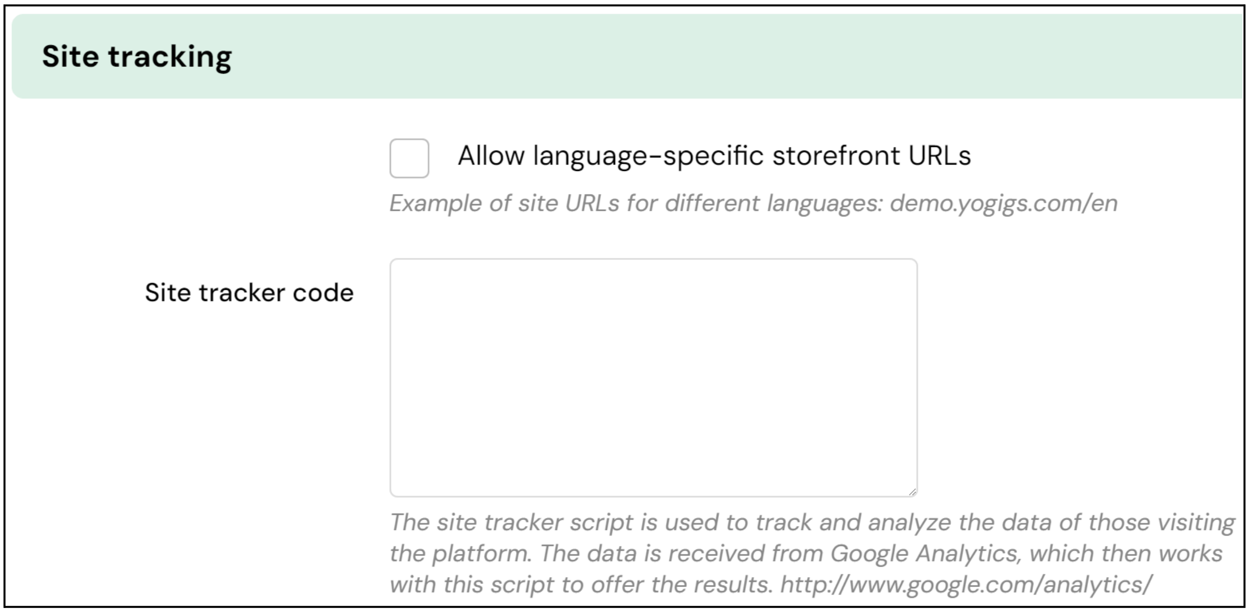
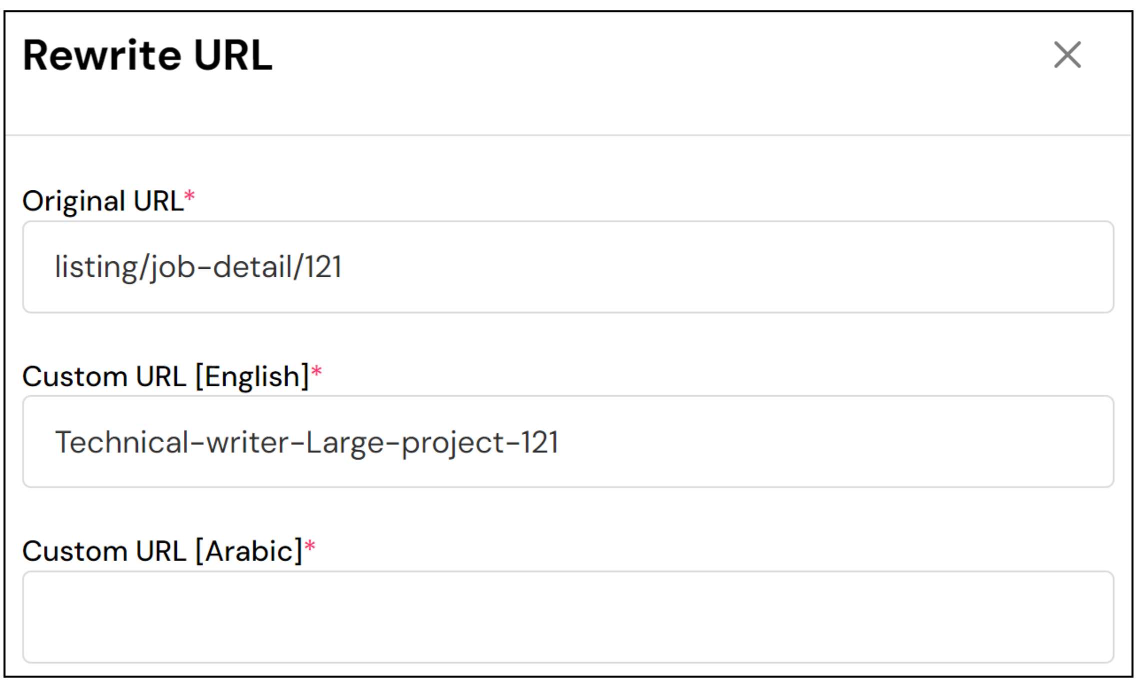


Update the following under this section:

- **Allow language-specific storefront URLs:** Checkmark this feature if you want to have website URLs in different languages.

  Once activated, you can edit the URLs for each language option under the **SEO > URL rewriting** submodule.

  The URL Rewriting form will have a field for each language's custom URL (as shown in the image below).



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The number of custom URL fields will depend on the number of languages that the website is available in (for example, in this case, the website is available in only two languages, so there are only two custom URL fields).

Deselect or leave this feature unchecked, if you want the platform to have only one custom URL for all languages.

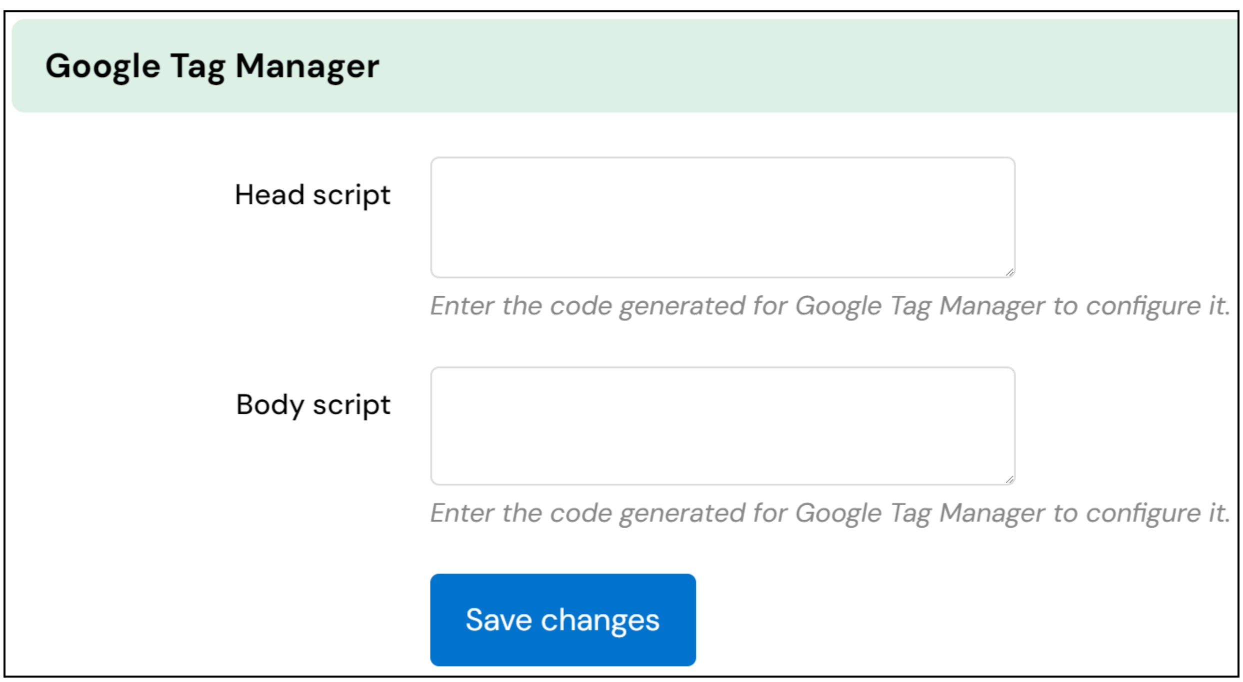
> **!** *If you do not add a custom secondary-language URL under [URL Rewriting](#) after activating this, each default language-specific URL will have a language segment in it for the secondary language.*
>
> *For example, the URL in the default language will be [demo.yogigs.com/](#) and the same URL for Arabic will be [demo.yogigs.com/ar/](#).*

- **Site tracker code:** Enter the site tracker code generated from Google Analytics to analyze the flow and activities of visitors at the front end of the website.

  To generate the code, follow the steps shared in the guide - [[Yo!Gigs - Google Analytics API and Site Tracker Setup Guide]](#). From the downloaded file, copy the code and paste it in this field.

6.2 Google Tag Manager

Google Tag Manager is a tag management system (TMS) that allows you to quickly and easily update measurement codes and related code fragments collectively known as tags on your website.



This is a part of Google Analytics and helps in transporting the data to Google Analytics that is then used to track the traffic and measure the engagement on the website.

Update the following:

- **Head script:** Enter the Head script. Copy the head script from the Google Tag Manager platform and paste it here.
- **Body script:** Enter the Body script. Copy the body script from the Google Tag Manager platform and paste it here.

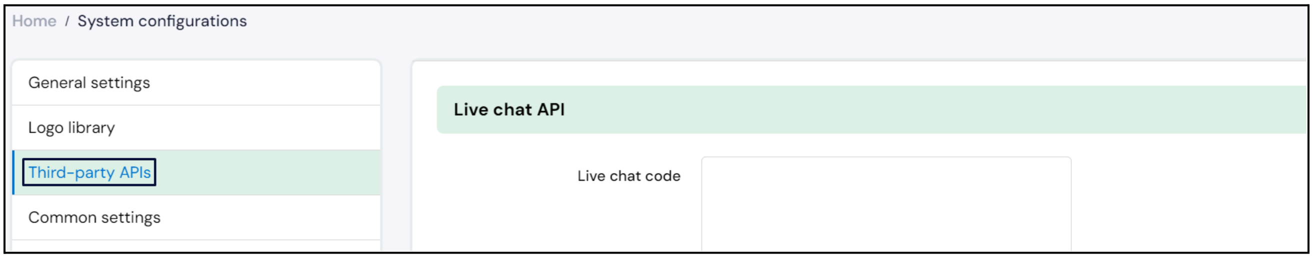
To generate the code, follow the steps shared in the guide - [Yo!Gigs - Google Tag Manager Setup Guide].

Once done, click **Save changes** to update the details.

7. Configure the Third-party APIs

Go to **Third-party APIs**, to set up the various third-party APIs that will help run the website smoothly including Google Maps, FB pixel and so on, under this form.

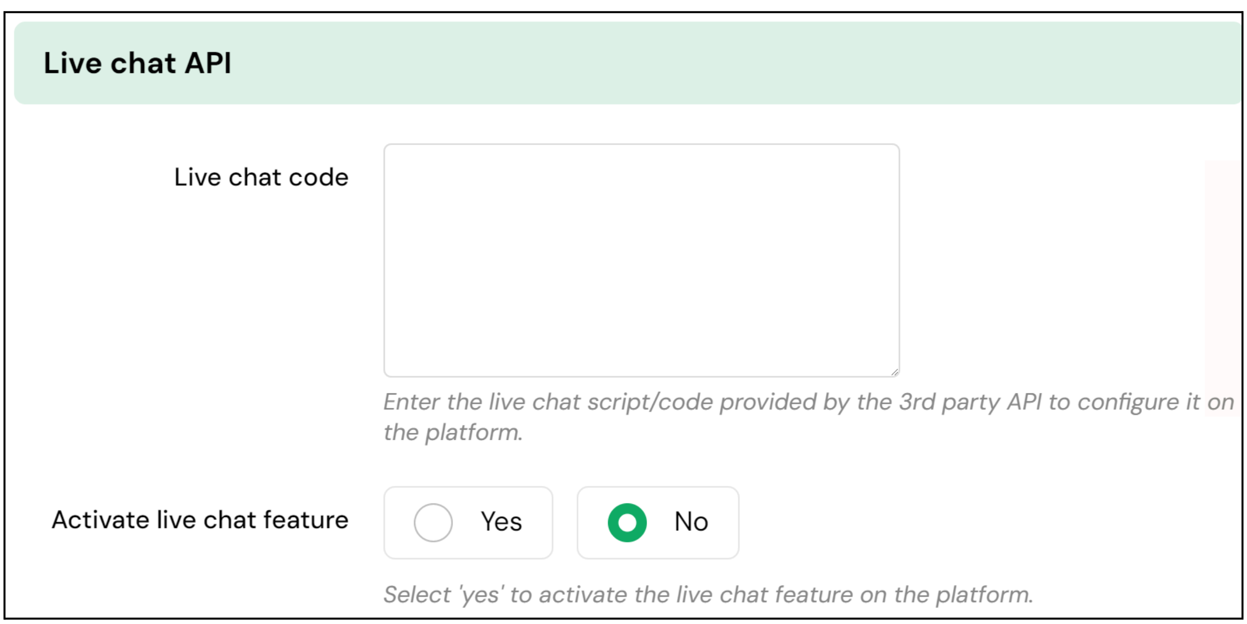
This form is divided into eight sections. Scroll down to view each section and update it accordingly:



*You DO NOT have to update all the third-party APIs under this section. Update only those third-party APIs that you need and then click **Save changes**.*

7.1 Live chat API

Configure and activate the live chat API on the platform, where a live support chat section will be visible on the front end of the platform to help users reach out to you faster and get solutions easily.



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To do this, update the following:

- **Live chat code:** Generate and enter the live chat code or script to activate the live chat feature on the platform.

  To generate the API key, follow the steps shared on - [Yo!Gigs- Live chat API Setup guide].

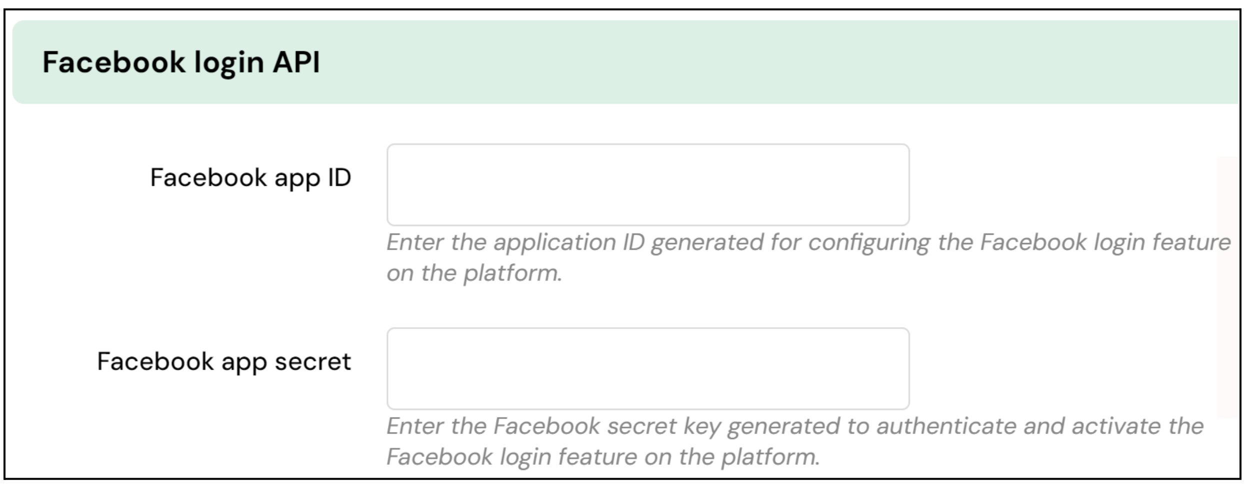
- **Activate live chat feature:** Select 'Yes' to activate the live chat feature and select '**No**' to leave it inactive.

  Ensure you update this setting after adding the live chat code in the field above to activate the feature on the platform.

Click **Save changes** to update it.

7.2 Facebook login API

Configure the Facebook social login API to allow users to use their Facebook credentials to log into or register on the platform.



Follow the steps shared on - [Yo!Gigs- Facebook Login API Setup Guide] to generate the configuration keys and details.

Once generated, update the following:

- **Facebook app ID*:** Enter the generated key.
- **Facebook app secret*:** Enter the generated key.

Click **Save changes** to update it.

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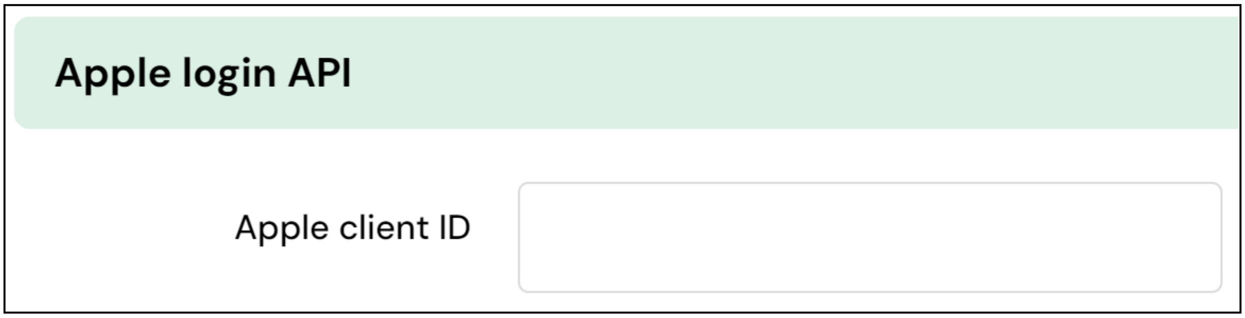
7.3 Apple login API

Configure the Sign in with Apple API to allow users to sign into or register on your platform using their Apple credentials.

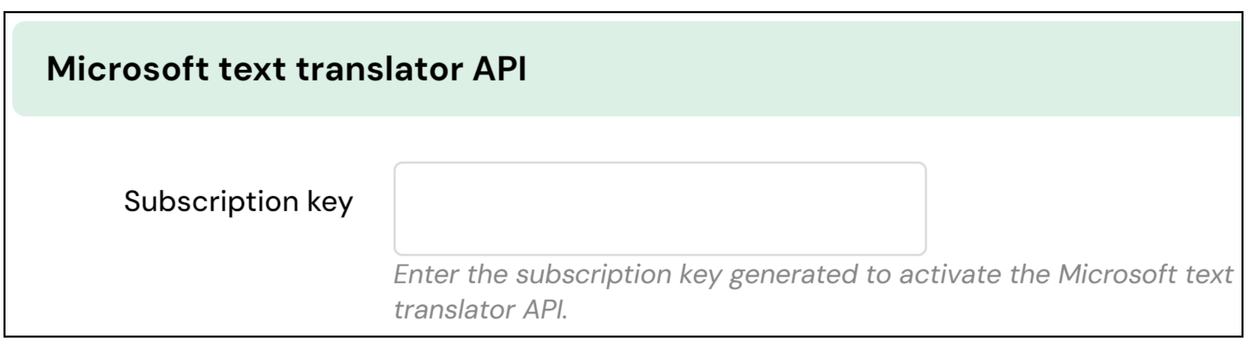


Generate the client ID key and add it in this field. To generate the key, follow the steps shared on - [Yo!Gigs- Apple Sign In API Setup Guide].

Click **Save changes** to update it.

7.4 Microsoft text translator API

Configure the Microsoft translator text API to activate the auto-translate feature on the platform, which is used to translate text from one language to another in real-time.



Generate the key for Microsoft text translator API by following the steps shared on - [Yo!Gigs- Microsoft Translator Text API Setup Guide].

Enter the generated key in the **Subscription key** field.

Click **Save changes** to update it.

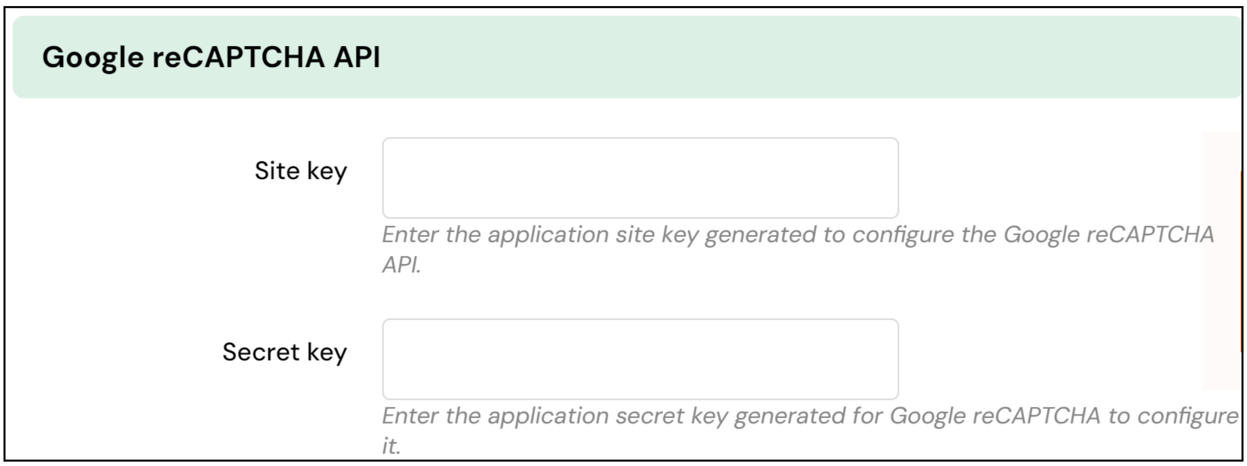
7.5 Google reCAPTCHA API

Google reCAPTCHA v2 helps you detect abusive traffic on your website without creating any user friction.

A puzzle is shared with users when they are about to make any major changes like change their password, log into their account and so on.

Based on the puzzle results, a score is calculated and can be analyzed on the reCAPTCHA v2 dashboard. This score will help you take appropriate action, if needed.

On Yo!Gigs, when activated, the Google reCAPTCHA feature is used on the sign up form, forgot password form and other forms (at the front end).



To generate the keys for the Google reCAPTCHA API, follow the steps shared on - [Yo!Gigs- Google reCAPTCHA v2 API Setup Guide].

Once generated, update the following:

- **Site key:** Enter the site key generated.
- **Secret key:** Enter the secret key generated.

Click **Save changes** to update it.

7.6 Google Maps API

Configure the Google Maps API to embed Google Maps on your website.

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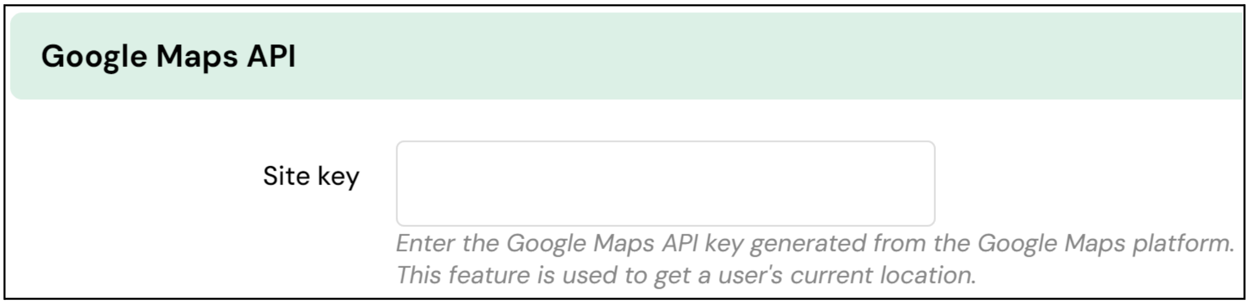
This will allow users to detect their location, add their address easily and a lot more.



To generate the API key for Google Maps, follow the steps shared on - [Yo!Gigs-Google Map API Setup Guide].

Then, enter it in this field. Click **Save changes** to update it.

7.7 Google Analytics API

Configure the Google Analytics API to extract the required Google Analytics tracking data and display the results on your dashboard (admin dashboard).

This API will only work if you have added the site tracker code under SEO & Tag manager.

Points to note:

- The Google Analytics platform helps track the traffic of your platform and each user's activities, once you add the site tracking code on your platform (under SEO & Tag manager).

  The tracked reports are reviewed on the Google Analytics dashboard.

- To view the traffic report on your dashboard (admin dashboard) as well, you will have to configure the GA4 API (this API).

  This API will help in extracting the tracked data from the Google Analytics platform, and display the applicable information under the Traffic widget on your dashboard.

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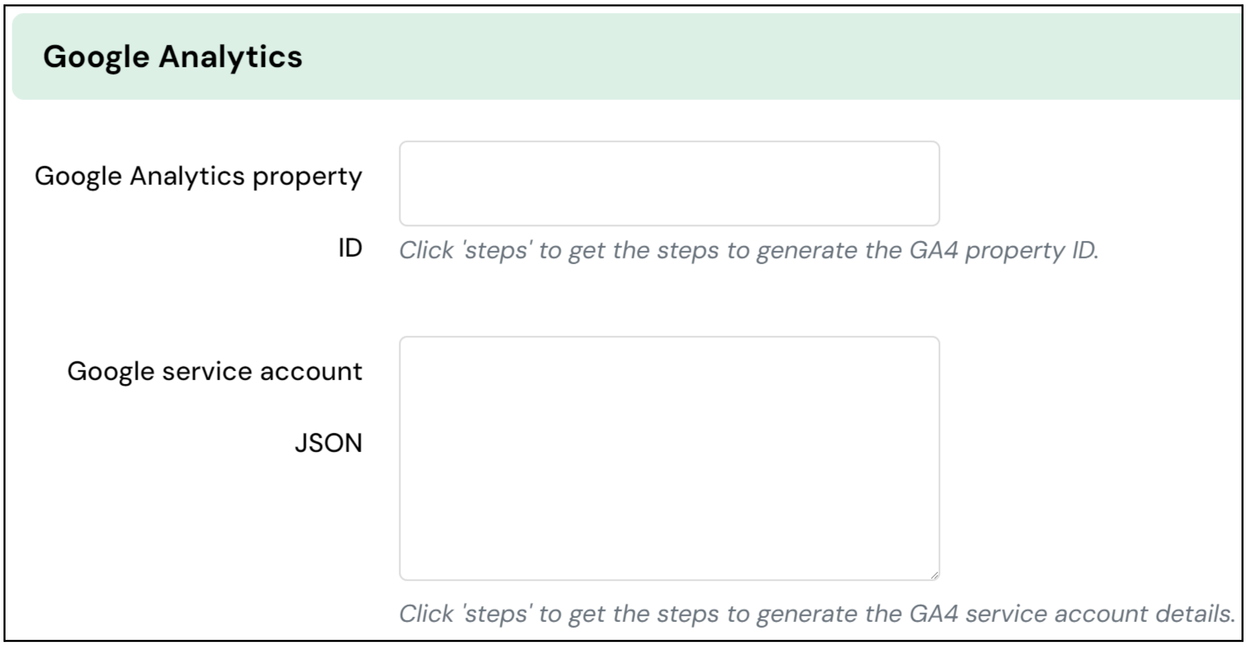

To generate the key and IDs for Google Analytics, follow the steps shared on - [Yo!Gigs- Google Analytics API and Site Tracker Setup Guide].

Once generated, update the following:

- **Google Analytics property ID:** Enter the Google Analytics property ID obtained.

  Click "steps" in the label below this field to view the steps to obtain the Google Analytics property ID.

- **Google service account JSON:** Enter the Google service account JSON obtained.

  Click "steps" in the label below this field to view the steps to obtain the Google service account JSON.

Click **Save changes** to update it.

7.8 Google login API

Configure the Google login API to allow users to log in or register on the platform using their Google credentials.

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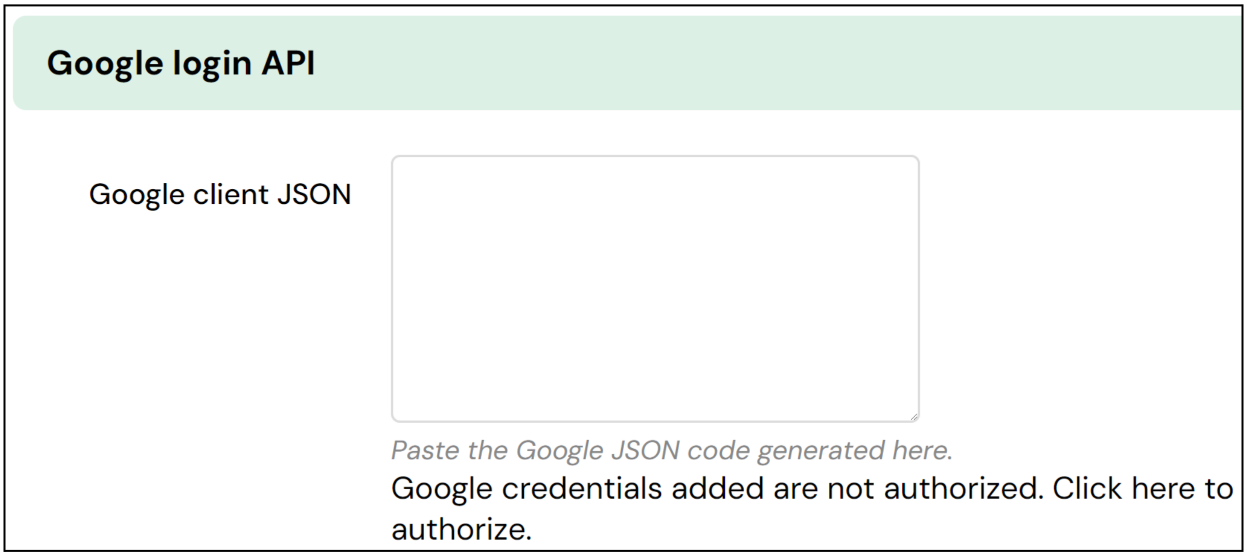


Follow the steps shared on - [Yo!Gigs- Google Login API Setup Guide] to generate the configuration keys and details.

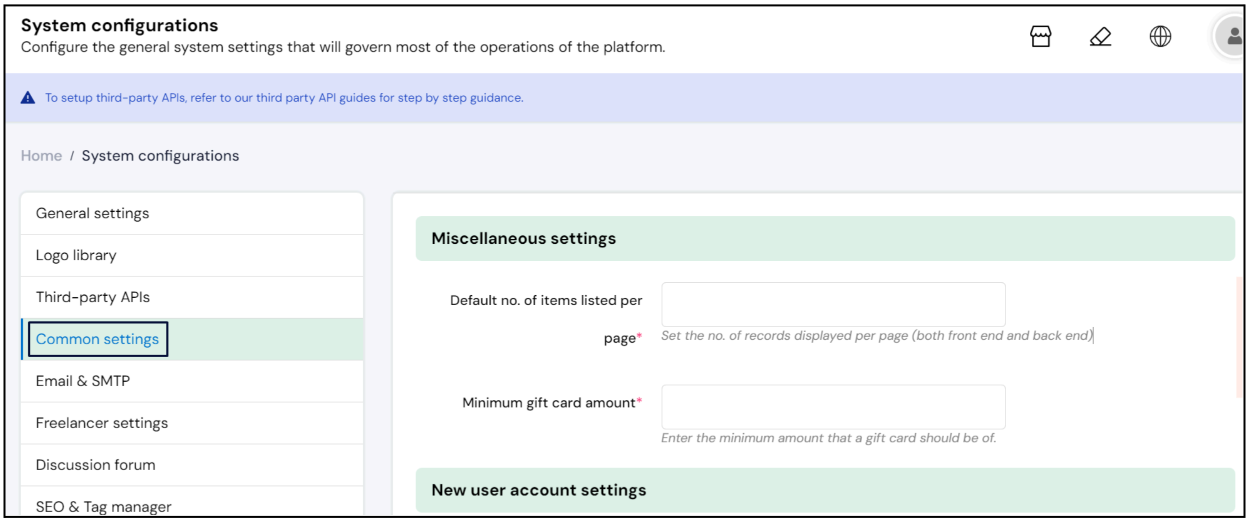
Once generated, add the **Google client JSON** obtained in this field.

Then, click the "**click here to authorize**" link to synchronize the platform with the updated API.

Once done, click **Save changes** to update the details.

8. Update the Common settings

Go to **Common settings** to update the various settings that govern all the main features of the platform.

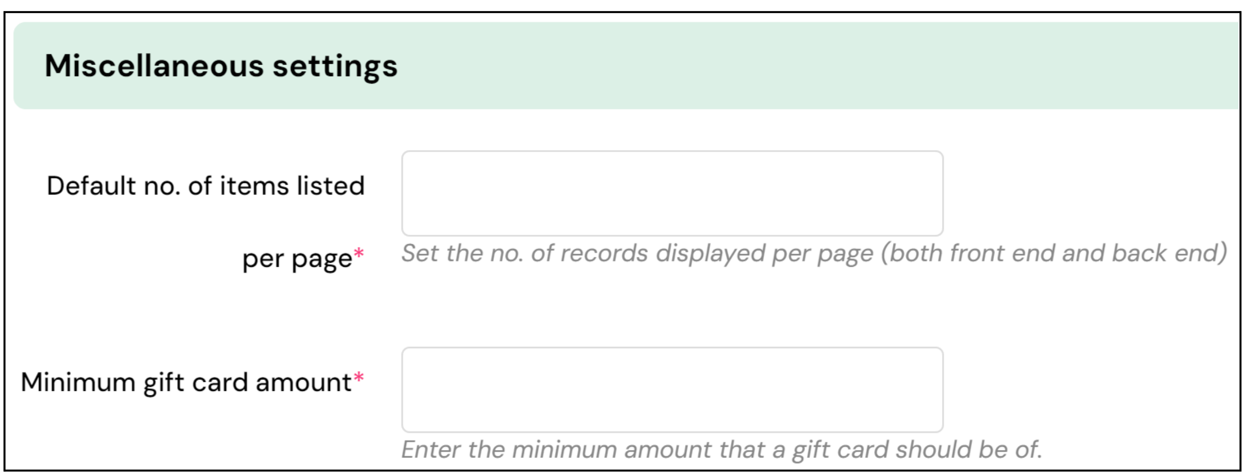


This form is divided into eleven sections.

Scroll down to view each section and update it accordingly:

Fill the information of every mandatory field before clicking ***Save changes*** *under this form, else an error will appear.*

8.1 Miscellaneous settings



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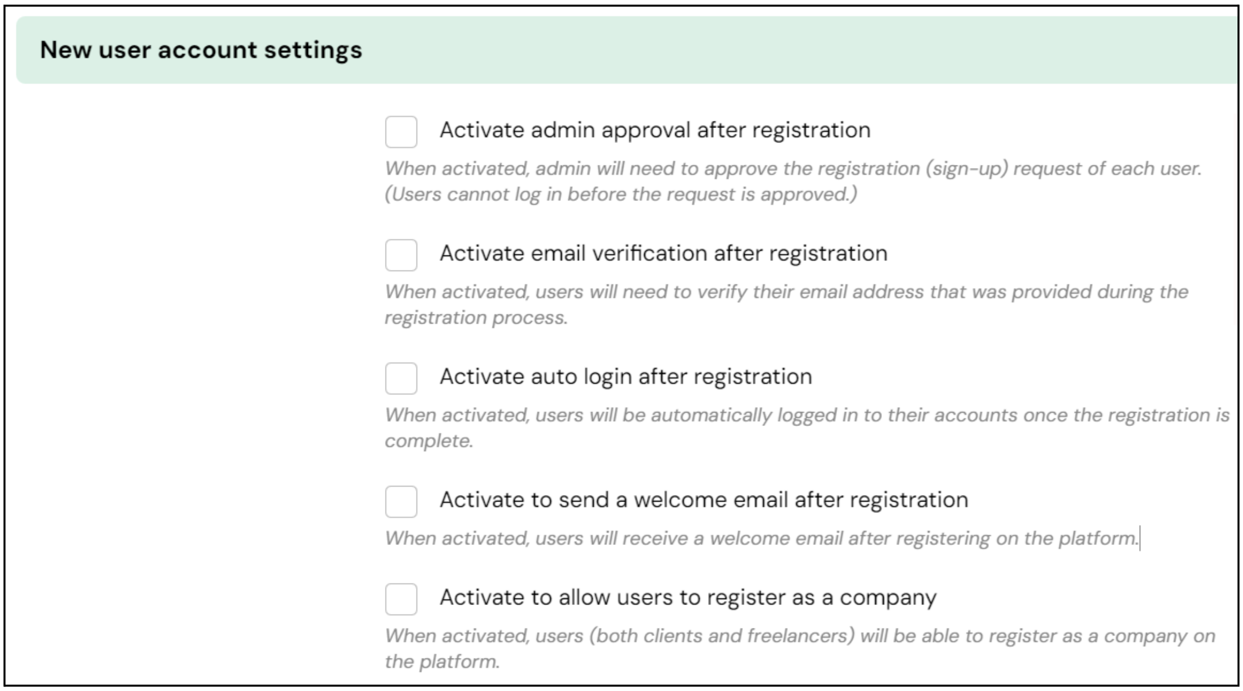
- **Default no. of items listed per page*:** Enter the number of items (records) that will be listed on a page, anywhere on the platform.

  For instance, if you enter 10 in this field, all the records list pages will display 10 records at once.

- **Minimum gift card amount*:** Enter the minimum amount a gift card can be of.

8.2 New user account settings



- **Activate admin approval after registration:** Check mark this feature to manually approve each user after their registration.

  *A user cannot log into the website after the registration unless and until you approve their registration request. The users and user requests can be managed under **Users > Platform users**.*

- **Activate email verification after registration:** Check mark this feature to make the process of email verification after the registration mandatory for a user.

  The user will not be able to sign in without verifying their email after registering on the website portal.

- **Activate auto login after registration:** Check mark this feature to allow the users to automatically log into the portal after registration. With this, the user will be taken to the dashboard automatically after registration.

This will work only if:

- The **Activate email verification after registration** feature is deactivated.
- The **Activate admin approval after registration** feature is deactivated.

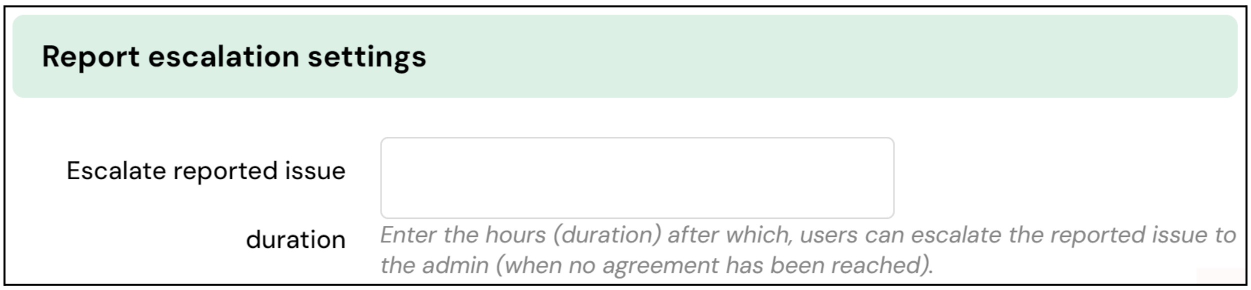
- **Activate to send welcome mail after registration:** Check mark this feature to send a welcome email to users, once they register.

  The welcome email will be sent using the predefined email template.

  *Review and edit the template under **CMS > Email templates**.*

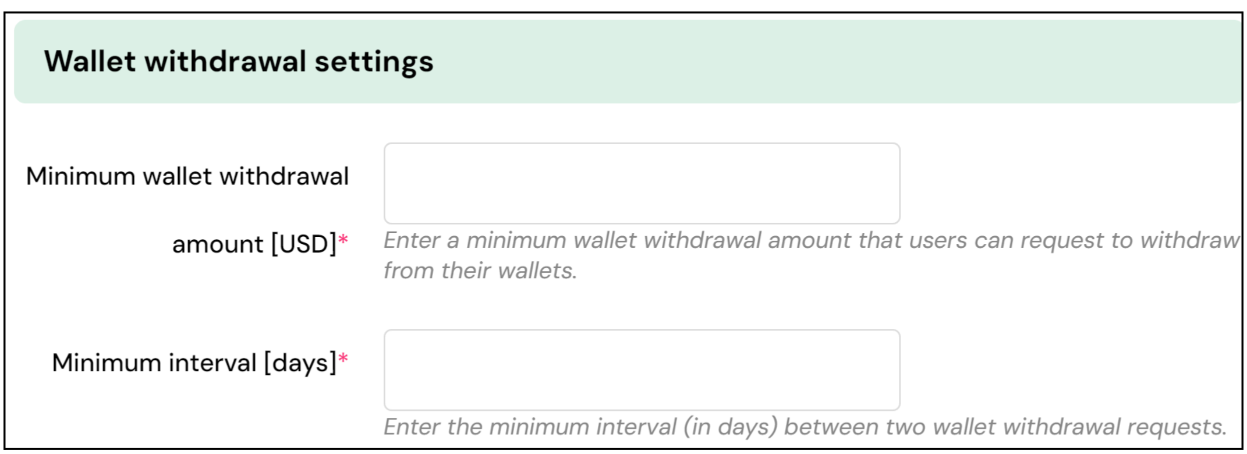
- **Activate to allow users to register as a company:** Check mark this feature to allow users (both clients and freelancers) to register as a company on the platform.

8.3 Report escalation settings



- **Escalate reported issue duration:** Enter the hours (duration) after which, users can escalate the reported issue to the admin (when no agreement has been reached).

8.4 Wallet withdrawal settings

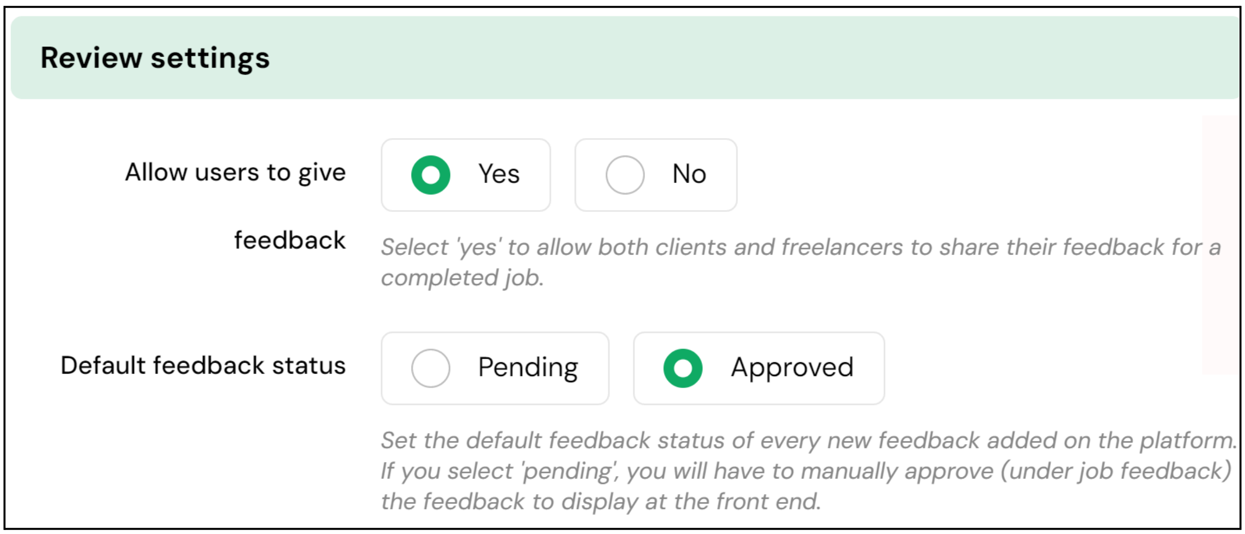


<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Minimum wallet withdrawal amount [Default currency]*:** Enter a minimum wallet withdrawal amount that users can request to withdraw from their wallets.
- **Minimum interval [days]*:** Enter the minimum interval (in days) between two wallet withdrawal requests.

  For instance, if you enter the value as 2 in this field and a user has already placed a wallet withdrawal request today, they will have to wait for 2 days after when they can then place another wallet withdrawal request.

8.5 Review settings



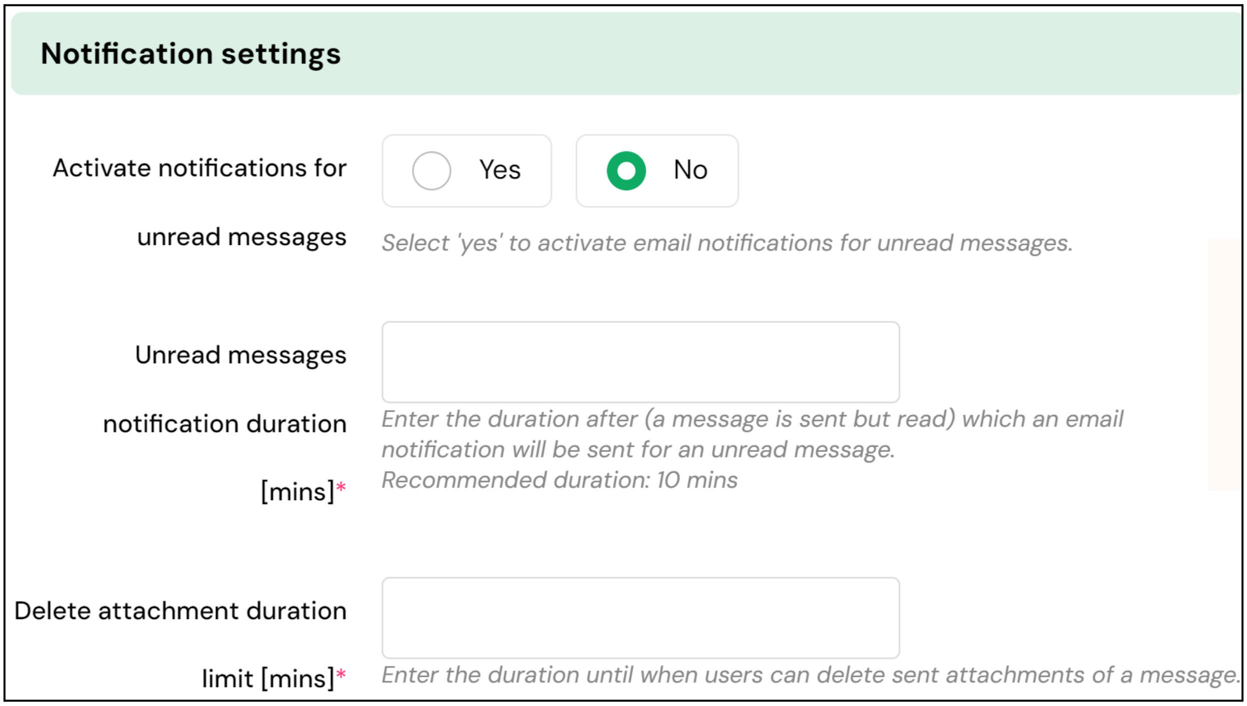
- **Allow users to give feedback:** Select 'Yes' to allow both clients and freelancers to share their feedback for a completed job.

  Select **'No'** to deactivate the feedback module, where no user will be able to share feedback for a completed job.
- **Default feedback status:** Set the default feedback status of every new feedback added on the platform.

  If you select 'pending,' you will have to manually approve (under job feedback) the feedback to display at the front end.

  If you select 'approved,' all the feedback added will be directly posted at the front end for the respective user's account.

8.6 Notification settings



- **Activate notifications for unread messages:** Select 'Yes' to activate email notifications for unread messages. With this, when a message is not read by the user, they will get an email notification about the message.

  Select **'No'** to not send email notifications for unread messages. With this, users who have unread messages, will have to log into the platform to find out about them, since no email notification will be sent letting them know that a new message has been received.

- **Unread messages notification duration [mins]*:** Enter the duration (from when a message is received) after which an email notification will be sent for an unread message to the respective user.

  Recommended duration is 10 mins. However, you can define a duration that works best for you.

- **Delete attachment duration limit [mins]*:** Enter the duration (from when the attachment is received) until when users can delete sent attachments of a message.

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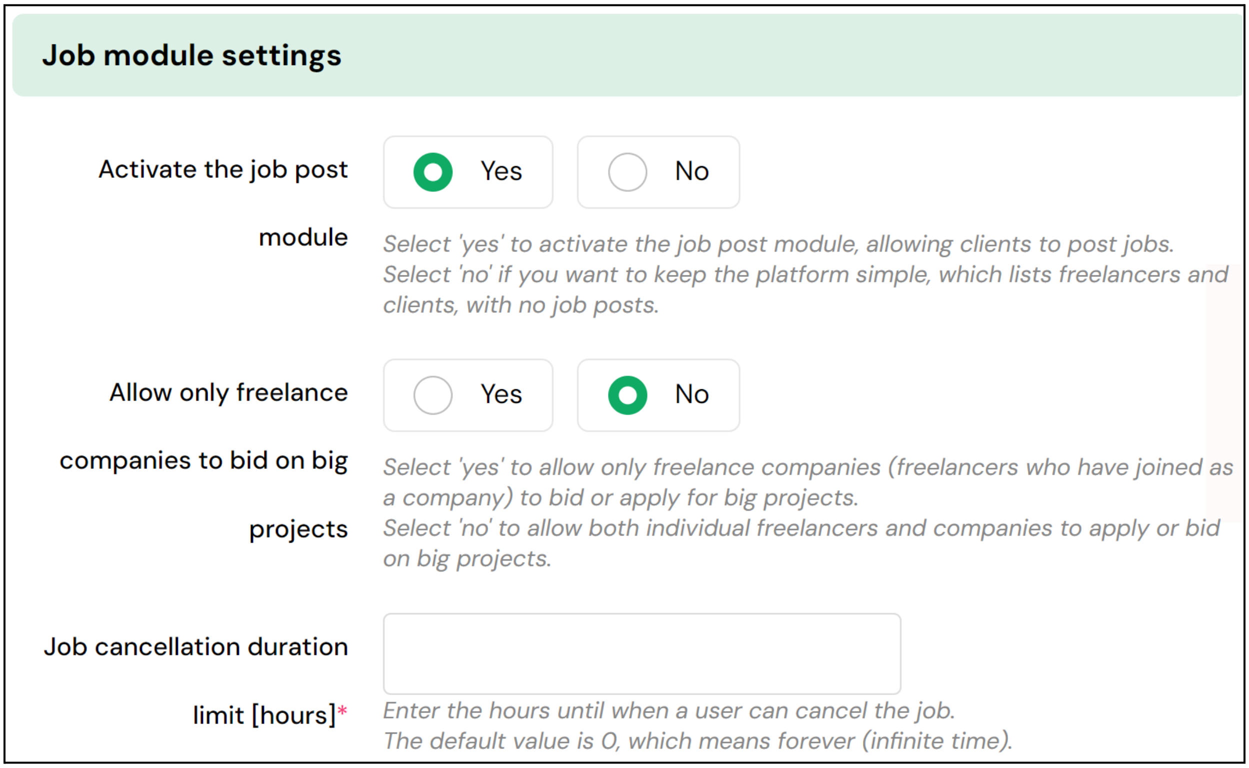
8.7 Job module settings



- **Activate the job post module:** Select '**Yes**' to activate the job post module, allowing clients to post jobs.

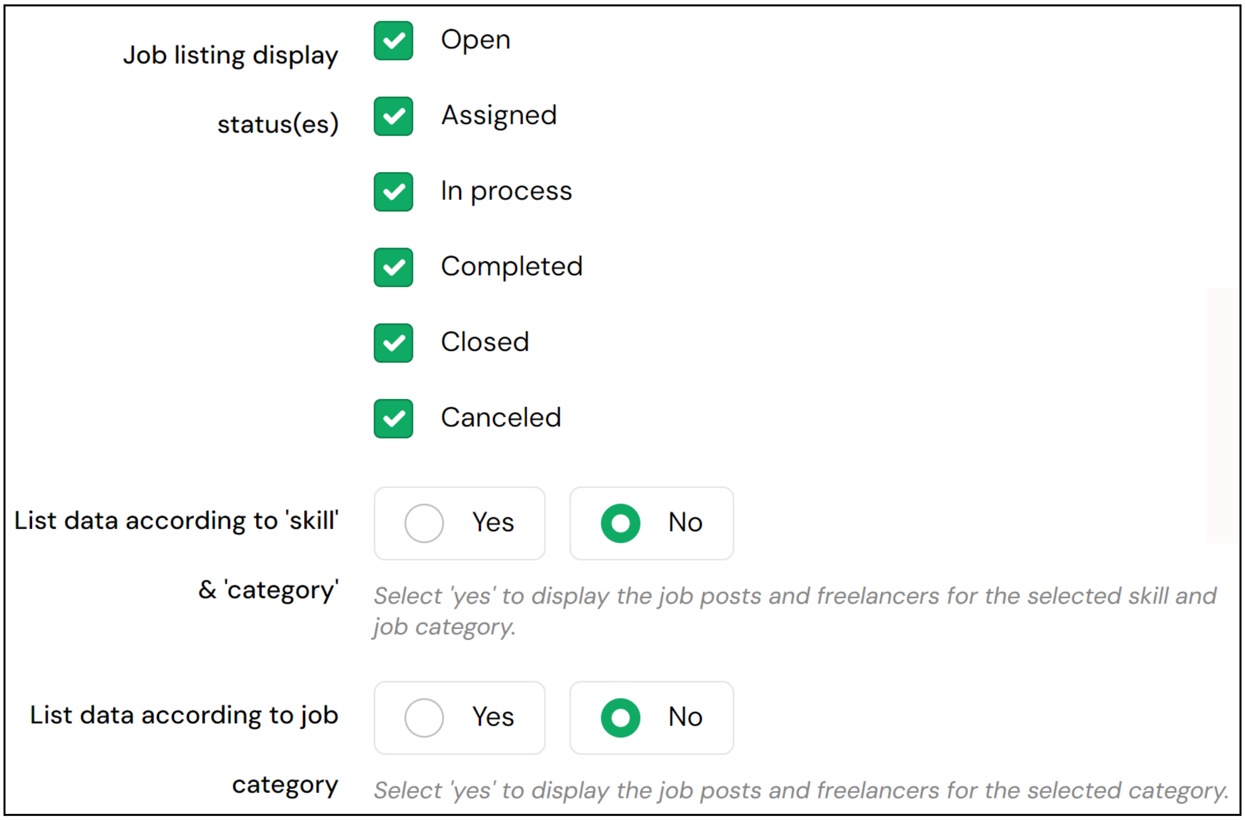
  Select '**No**' if you want to keep the platform simple, which lists freelancers with no job posts. In this situation, clients will be able to find freelancers and work with them directly.

- **Allow only freelance companies to bid on big projects:** Select '**Yes**' to allow only freelance companies (freelancers who have joined as a company) to bid or apply for big projects.

  Select '**No**' to allow both individual freelancers and companies to apply or bid on big projects.

  ! *If you have not activated the feature '**Activate to allow users to register as a company**' under the **new user account settings** section of this form, selecting '**yes**' will simply restrict all freelancers from bidding on big projects.*

Scroll down to update the next settings:



- **Job listing display status(es):** Select the status(es) of job posts that will be listed on the job listing page, at the front end.

  To explain better, if you select all statuses in this list, every job that has ever been posted, regardless of if the job has been completed, is in process, was canceled, was closed, and so on, they all will be listed on the job listing page.

- **List data according to 'skill' & 'category':** Select '**Yes**' to display the job posts and freelancers for the selected skill and job category.

  To explain how it works, if a freelancer is looking for a job and this feature has been activated, the job posts will be listed based on the respective freelancer's skills and job category.

  Select '**no**' to display all the freelancers and job posts regardless of their skill set and job category.

- **List data according to job category:** Select '**Yes**' to display the job posts and freelancers for the selected category.

  To explain how it works, if a freelancer is looking for a job and this feature has been activated, the job posts will be listed based on the respective freelancer's job category.

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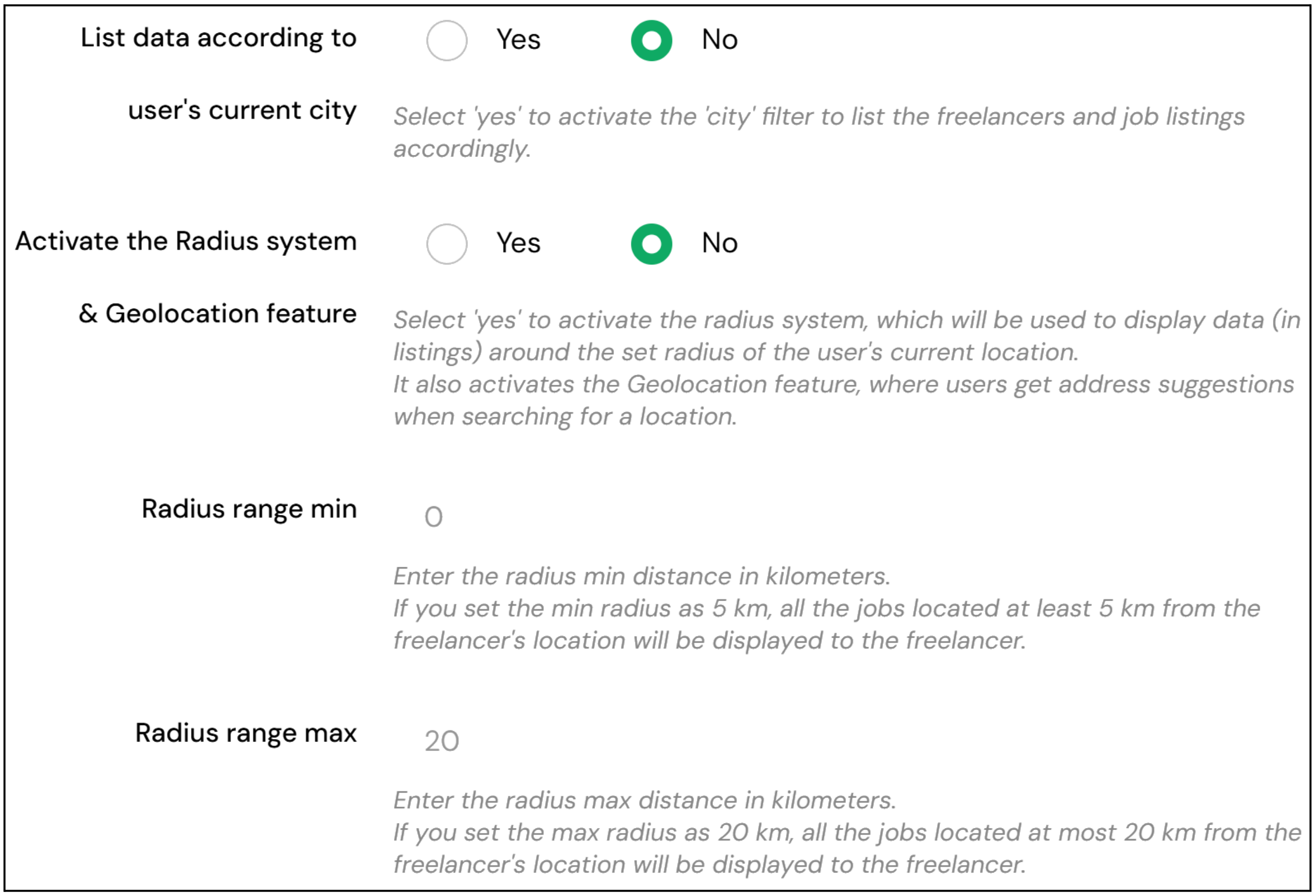
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Select **'No'** to display all the freelancers and job posts regardless of their job category.

Scroll down to update the next settings:



- **List data according to user's current city:** Select 'Yes' to display the freelancers and job posts based on the user's currency city.

  To explain how it works, if a freelancer is looking for a job and this feature has been activated, the job posts will be listed based on the respective freelancer's current city.

  This is applicable only for the on-site (in-person) jobs.

  Select 'No' to display all the freelancers and job posts regardless of the user's current location.

- **Activate the Radius system & Geolocation feature:** Select 'Yes' to activate the radius system, which will be used to display the listing data around the set radius of the user's current location.

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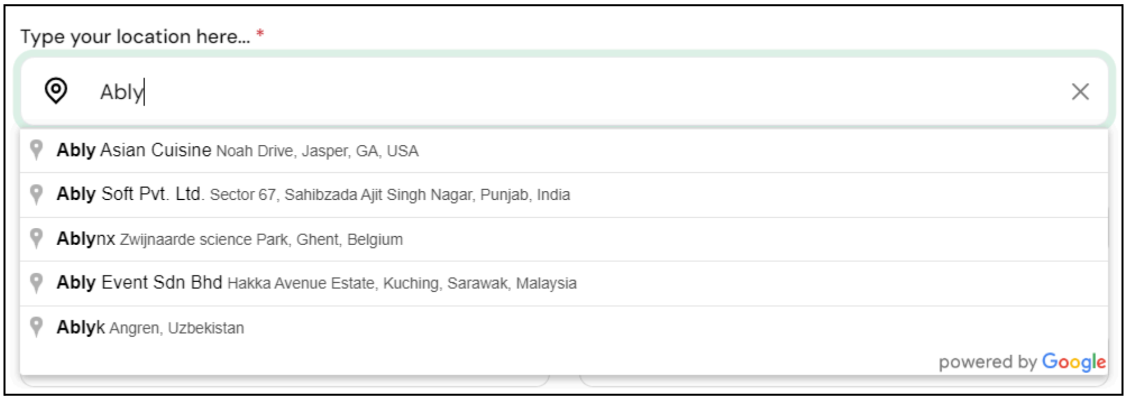
To explain better, with this activated, freelancers will be able to view job posts that are around their area (falls within their current location's radius). Clients will be able to view the freelancers who are available around their area.

Additionally, activating this feature will make the radius filter visible to clients on the job listing page.

*Define the radius range in the next field (**radius range**).*

It also activates the geolocation feature that allows users to get suggestions when searching for an address (image below), and to allow the system to track their current location.



*The geolocation feature and radius feature will only work if you have configured the [Google Maps API](#) under **Settings > System configurations > [Third-party APIs](#)**.*

Select '**No**' to deactivate the location feature. With this, all job listings and freelancer listings will be displayed

- **Radius range min:** Enter the minimum radius in kilometers.

  *This field is accessible only if you selected '**Yes**' for the '**Activate the Radius system & Geolocation feature**' feature.*

  It affects listings only and does not impact suggestions shown under the address field.

  If you set the min radius as 5 km, all the jobs at least 5 km of a freelancer's location will be displayed to the freelancer.

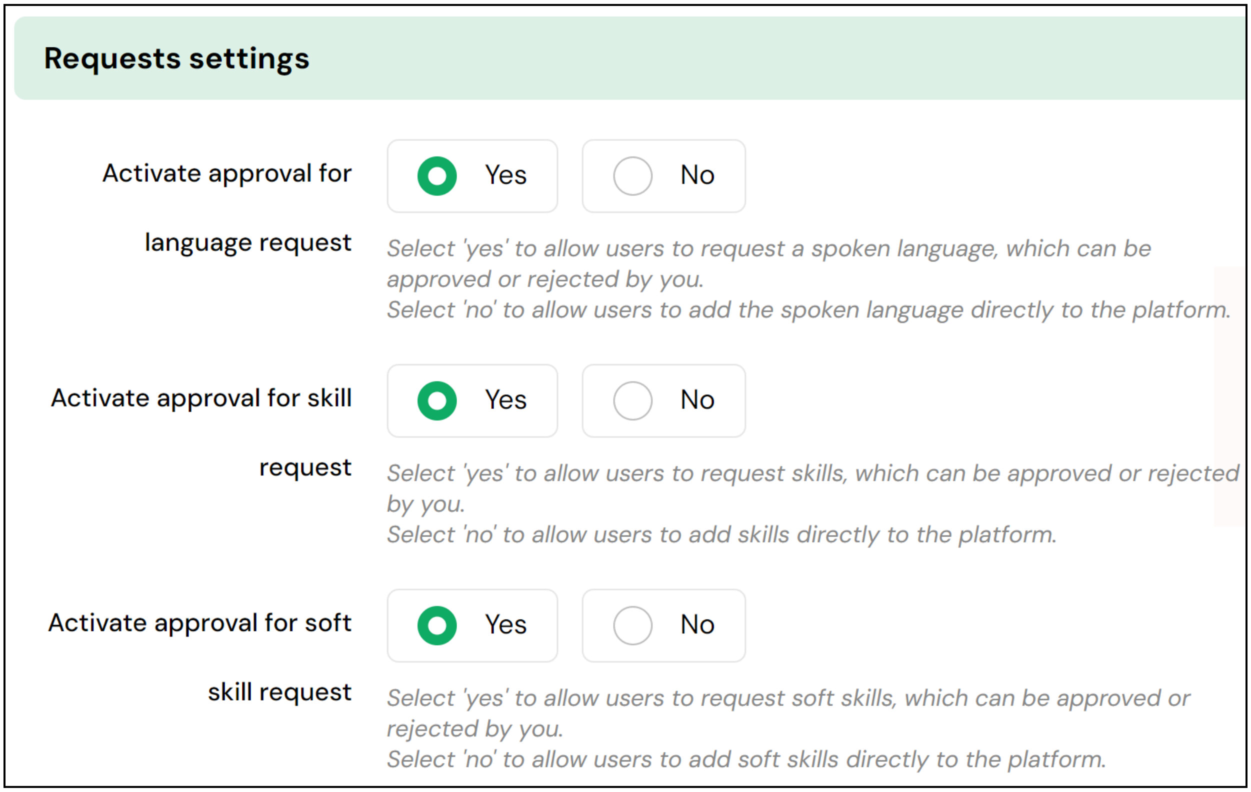
- **Radius range max:** Enter the maximum radius in kilometers.

  *This field is accessible only if you selected '**Yes**' for the '**Activate the Radius system & Geolocation feature**' feature.*

  It affects listings only and does not impact suggestions shown under the address field.

If you set the max radius as 20 km, all the jobs at most 20 km of a freelancer's location will be displayed to the freelancer.

8.8 Requests settings



- **Activate approval for language request:** Select '**Yes**' to allow users to request a spoken language, which can be approved or rejected by you.

  *Manage all the spoken language requests under **Requests** > Spoken language requests.*

  Select '**No**' to allow users to add the spoken language directly to the platform.

- **Activate approval for skill request:** Select '**Yes**' to allow users to request skills, which can be approved or rejected by you.

  *Manage all the skill requests under **Requests** > Skill requests.*

  Select '**No**' to allow users to add skills directly to the platform.

- **Activate approval for soft skill request:** Select '**Yes**' to allow users to request soft skills, which can be approved or rejected by you.

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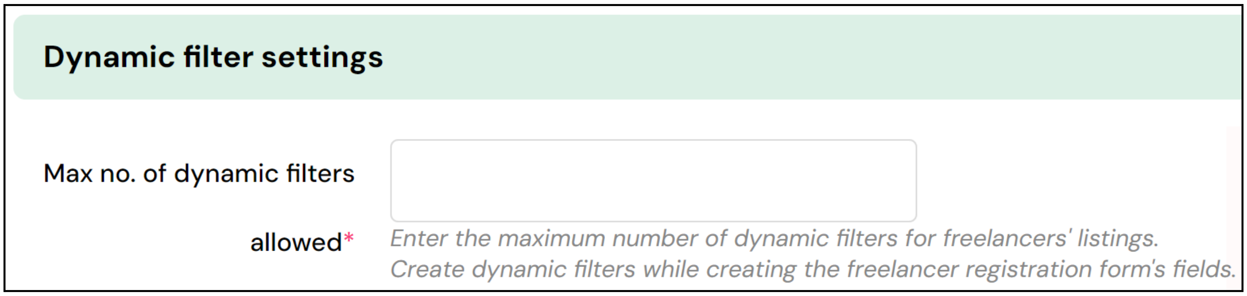
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

> *Manage all the soft skill requests under **Requests** > [Soft skill requests](#).*

Select '**No**' to allow users to add soft skills directly to the platform.

8.9 Dynamic filter settings

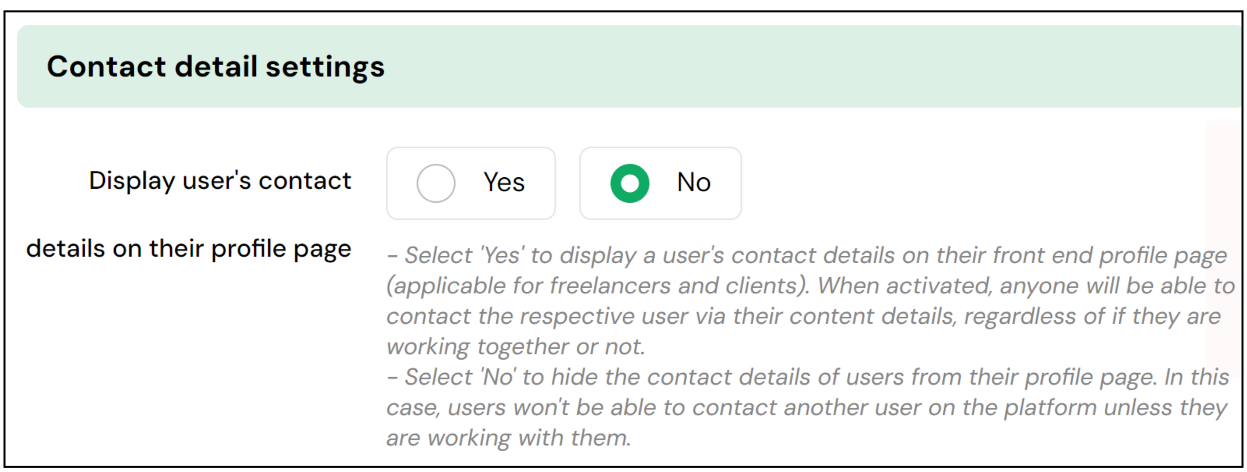


- **Max no. of dynamic filters allowed*:** Enter the maximum number of dynamic filters that can be there on the freelancer listing page.

> *Create dynamic filters while creating the freelancer registration form's fields under **Freelancer** > [Registration form's dynamic fields](#). Based on the number entered in this field, you will be able to create exactly these many dynamic filters.*

The dynamic filters will help filtering the list of freelancers on the freelancer listing page.

8.10 Contact detail settings

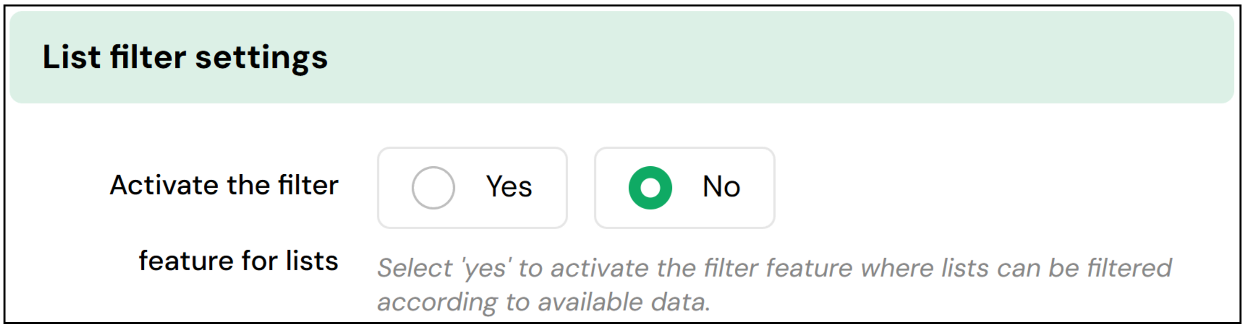


- **Display user's contact details on their profile page:** Select 'Yes' to display each user's contact details on their profile detail page at the front end (applicable for both the freelancers and clients).

This will allow users to contact other users directly, regardless of if they are working together or not.

Select '**No**' to hide each user's contact details from their profile detail page. In this case, users won't be able to contact another user on the platform unless they are working with them.

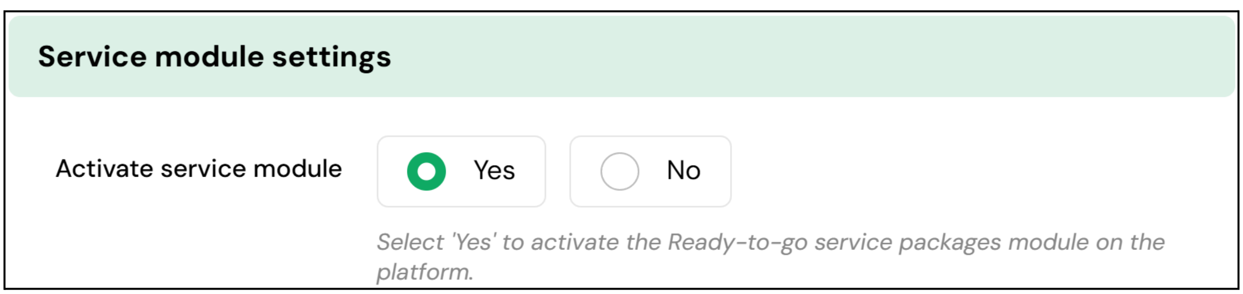
8.11 List filter settings



- **Activate the filter feature for lists:** Select '**Yes**' to activate the filter feature, allowing users to filter lists and easily find relevant freelancers, jobs, or services.

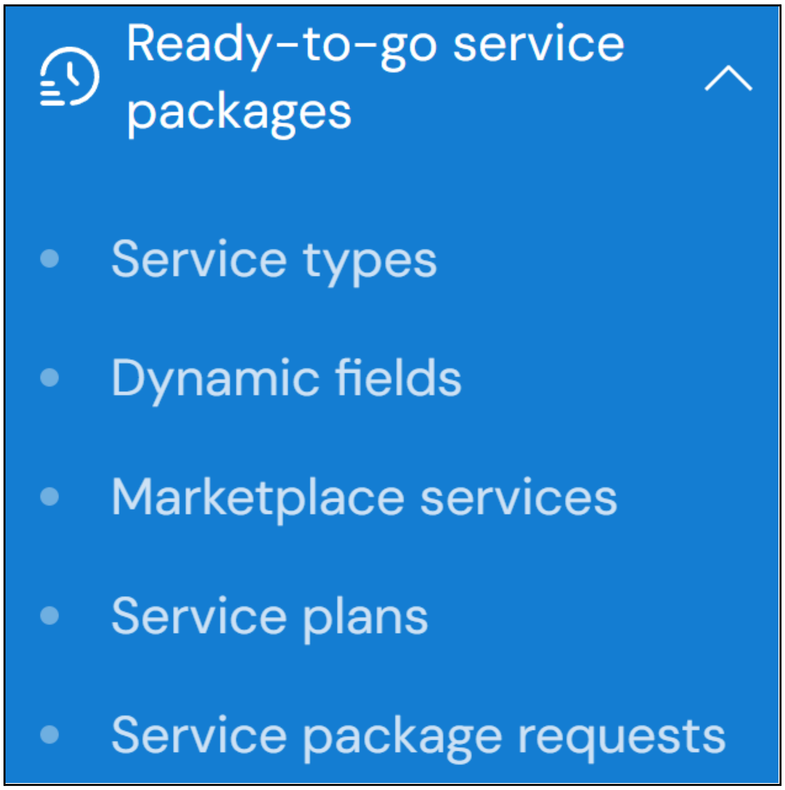
  Select '**No**' to deactivate the filter feature. In this case, users will need to manually browse the listings.

8.12 Service module settings



- **Activate service module:** Select '**Yes**' to activate the Ready-to-go service packages module, allowing freelancers to offer pre-defined service packages to the clients.

  Upon activating this setting, the **Ready-to-go service packages** module along with its related submodules will appear on the left navigation panel.



Select **'No'** to disable the module, preventing freelancers from creating or listing service packages. The module and its related submodules will be hidden from the panel.

8.13 Service package approval settings

- **Activate approval for service packages:** Select 'Yes' to make admin approval necessary before a freelancer can publish any new service added by them.

  When this setting is activated, the admin will have to review all services added under the Service package requests submodule and either approve or reject them accordingly.

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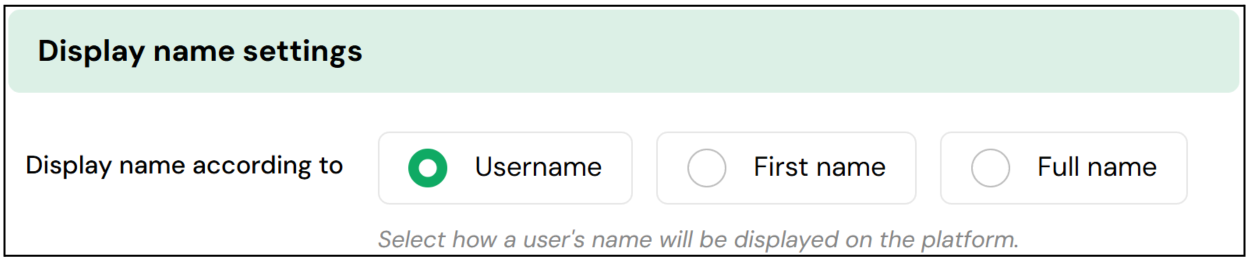
Select '**No**' to allow freelancers to publish new services without requiring admin approval.

However, you can still review all added services under the **Service list submodule**.

8.14 Display name settings



- **Display name according to:** Select how the user's name will be displayed on the platform.
  - Username
  - First name
  - Full name

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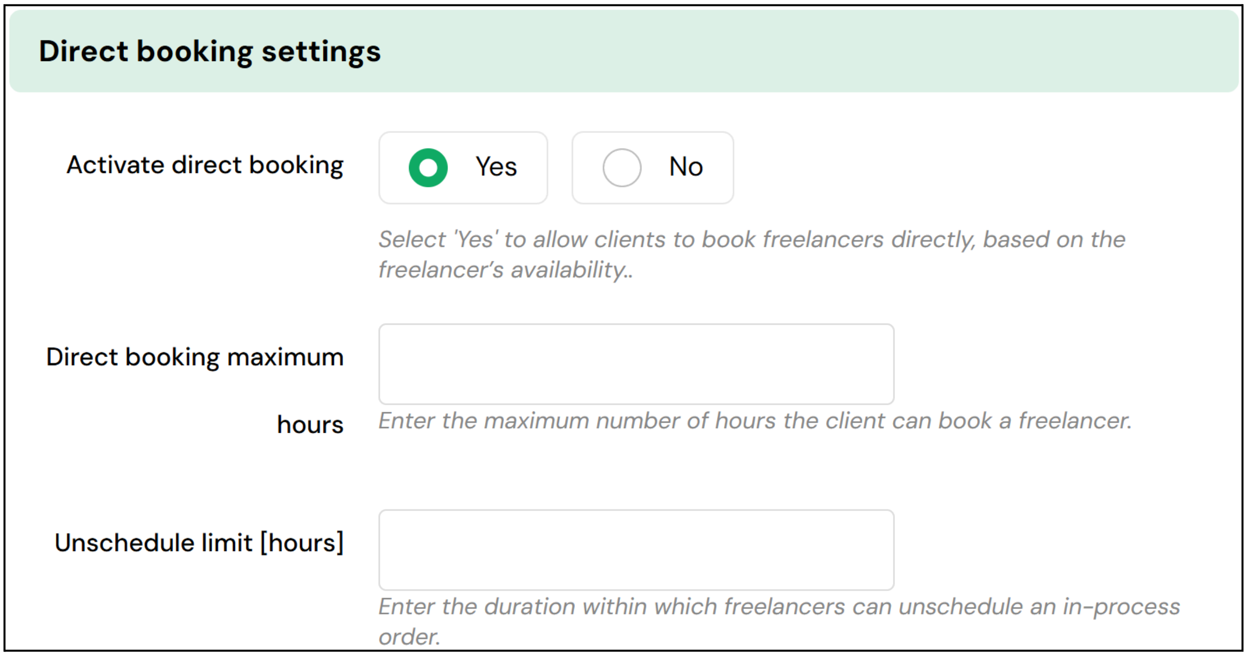
8.15 Direct booking settings



- **Activate direct booking:** Select '**Yes**' to allow clients to book freelancers directly based on the freelancer's availability.

  Upon activating this setting, the **Direct booking orders** and **Direct booking subscription orders** submodule will appear on the left navigation panel under the **Orders** module.

  Additionally, the clients can directly book the freelancers based on the availability set by the freelancers.

  Select '**No**' to deactivate this feature on the platform.

- **Direct booking maximum hours:** Enter the maximum number of hours a client can book a freelancer.

  For instance, if set to 5 hours, clients will not be able to book freelancers for more than 5 hours at a time**.**

- **Unschedule limit (hours)** – Enter the duration within which freelancers can unschedule an in-process order.

  For instance, if set to 2 hours, freelancers can cancel or reschedule an order within 2 hours of its scheduled start time.

  After this time limit, the order will remain in process and cannot be unscheduled.

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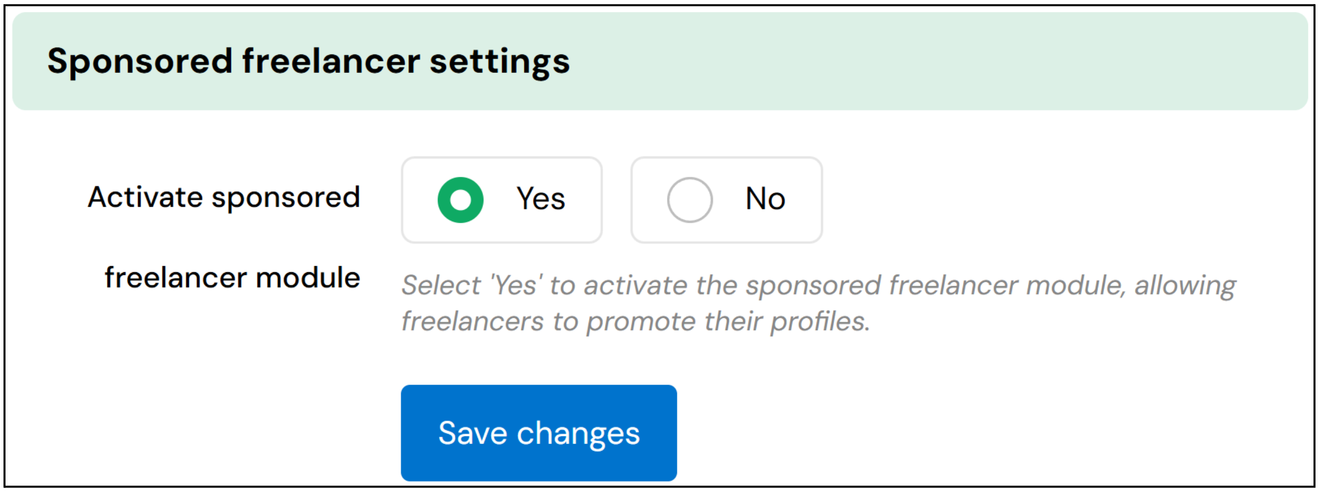
8.16 Sponsored freelancer settings



Activate sponsored freelancer module: Select '**Yes**' to activate the sponsored freelancer module, allowing freelancers to get sponsored their profiles for better visibility.

Upon activating this setting, the Sponsored freelancer module along with its related submodule will appear on the left navigation panel.

Select '**No**' to disable this feature, preventing freelancers from promoting their profiles.

Once everything has been updated, click **Save changes.**

Ensure all the mandatory fields are filled, else an error will appear and you won't be able to move forward.

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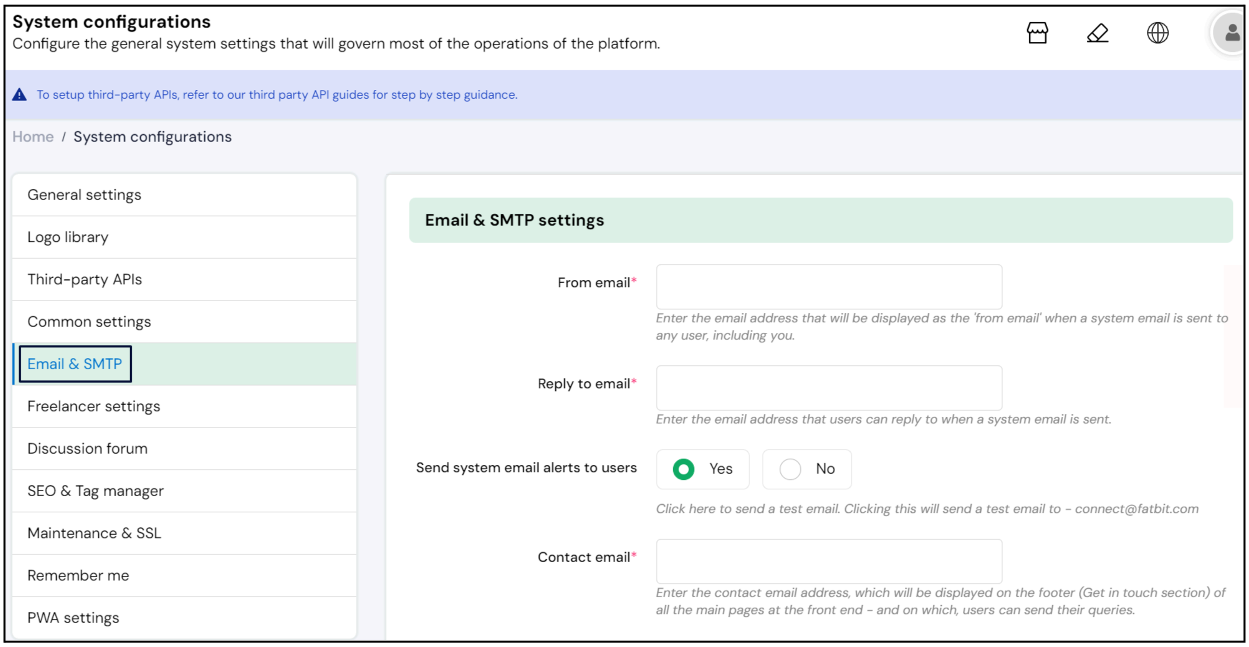
9. Update the Email & SMTP settings

Go to **Email & SMTP settings** to activate the system email feature, where users (including you) are notified via a system email (email alert) about an action that affects their account.

For instance, when a client registers on the platform, if this feature has been configured, an alert email is sent to them about their registration on their registered email address, and an email is sent to you as well.



Points to note

There are two types of email configurations that work on the platform:

- PHP (not recommended)
- SMTP (highly recommended - to avoid any additional costs and hassle)

The PHP system will work only if your web server allows it, which happens only after it has been integrated into your server and code level.

And to configure this option, you only need to update the fields above the '**Activate SMTP email feature**' setting, and leave the rest of the SMTP-related fields as it is.

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In case you want to use a third-party email service (SMTP), then you need to activate the SMTP email feature and configure it, by updating all the fields under this form.

With this clear, update the following:

- **From email*:** Enter the email address that will be used as the sender's email for all the emails sent from the platform to any user.

  ! *If you are activating the SMTP feature, ensure that this email address is the same as the one you used to get the SMTP details. If not, it will display an error.*

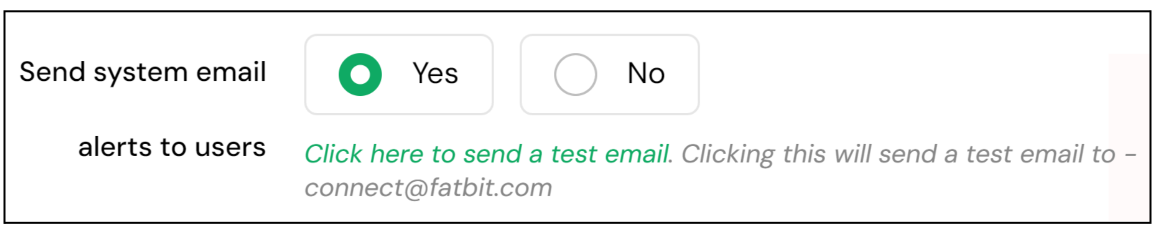
  And if you are using the PHP feature, ensure that this email is the same as added with the PHP code. If not, it will not work.

- **Reply to email*:** Enter the email address that users can reply to, when a system email is sent to them. This email will be displayed as the 'reply to email' in the email sent.

- **Send system email alerts to users:** Select 'Yes' to allow the system to send email alerts to users (including you).

  Select 'No' if you do not want the system to send any email alerts. With this, users (and you) won't get any email notifications (alerts) from the platform.

- **Click here to send a test email:** Select this link to check if the email alert system is working or not, once you have added all the information and saved it using the Save changes button.

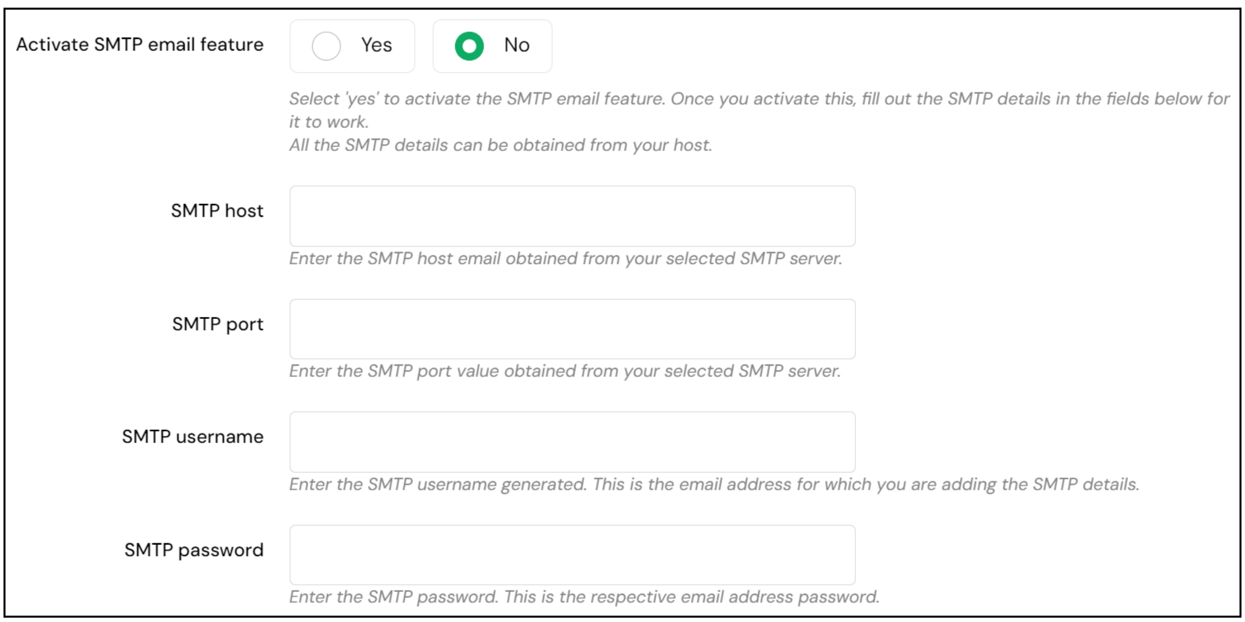
  When clicked, a test email is sent to the site owner on their email address (as defined under Settings > System configurations > General settings).

- **Contact email:** Enter the contact email address that the users can send emails to when they want to contact the website owner.
  - All the queries received from the Contact Us form will be forwarded to this email address.
  - This email address is displayed on the footer section of all the main pages at the front end of the platform.

*If you are **using the PHP server** for sending the email alerts, then once you have added the above details, activated the email alert service and clicked **Save changes**, your work is done. Leave the rest of the fields and move to the next step.*

*However, to **use the SMTP server**, you need to update the next fields as well.*

Scroll down to update the next fields:



- **Activate SMTP email feature:** Select 'Yes' to allow the system to use the SMTP server to send email alerts to users from the platform.

  If activated:

  - All the emails will be sent through this SMTP set up, and not PHP (where the emails are sent directly from your web server).

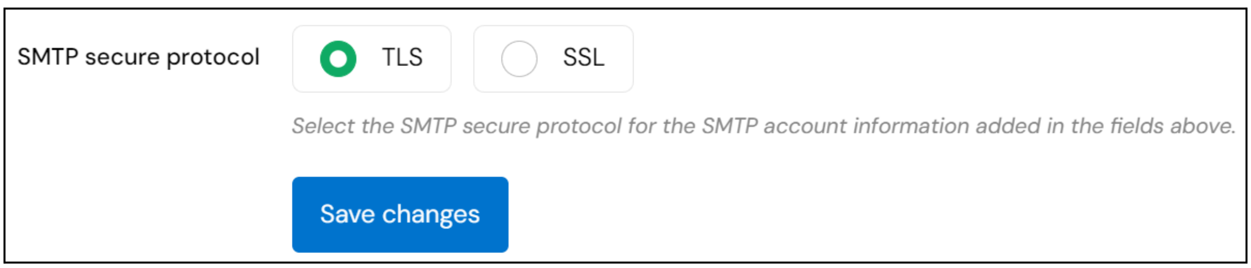
  - Ensure that the data entered in the next field is right for the system to work. Obtain the SMTP details by following the steps shared - [Yo!Gigs- SMTP Email Settings Guide].

! *Once you activate this feature, ensure that all the SMTP details required (obtained from your SMTP provider) for this to work properly are updated in the NEXT fields.*

Select '**No**' if you are using the PHP server.

- **SMTP host:** Enter the SMTP host generated.
- **SMTP port:** Enter the SMTP port generated.
- **SMTP username:** Enter the SMTP username generated. This is the email address for which you are adding the SMTP details.
- **SMTP password:** Enter the SMTP password. This is the respective email address password.

Scroll down to update the last field:



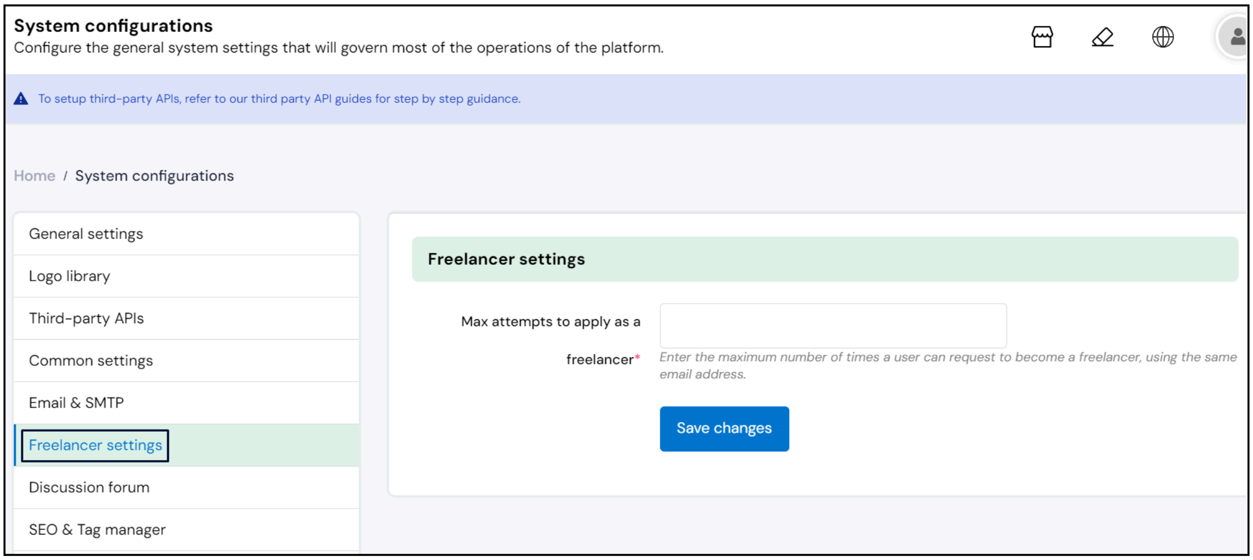
- **SMTP secure protocol:** Select the option based on the settings received by the server. There are two options to select from:
  - **TLS:** Transport Layer Security (TLS) is the successor protocol to SSL (an improved version). It works in the same way as the SSL, using encryption to protect the transfer of data and information.
  - **SSL:** SSL stands for Secure Sockets Layer. It's the standard technology for keeping an internet connection secure and safeguarding any sensitive data that is being sent between two systems.

i *Select the SMTP secure protocol option shared by your SMTP provider.*

Click **Save changes** to update all the details.

10. Update the Freelancer settings

Go to **Freelancer settings**, to define how many times a freelancer can attempt to join the platform (using the same email address).



There is only one field under this form. Update it accordingly:

- **Max attempts to apply as a freelancer*:** Enter the maximum number of times a user can request to become a freelancer, using the same email address.

  To explain its working, let us assume that you enter the value 3 in this field. In this case, a user can request to become a freelancer and get rejected three times at maximum (provided they are using the same email address to register as a freelancer).

  And since the maximum attempts are 3 (in this example), they won't be able to register as a freelancer for the fourth time using the same email address.

Once done, click **Save changes** to update the setting.

With this, all the required settings under the **System configurations** will be updated.

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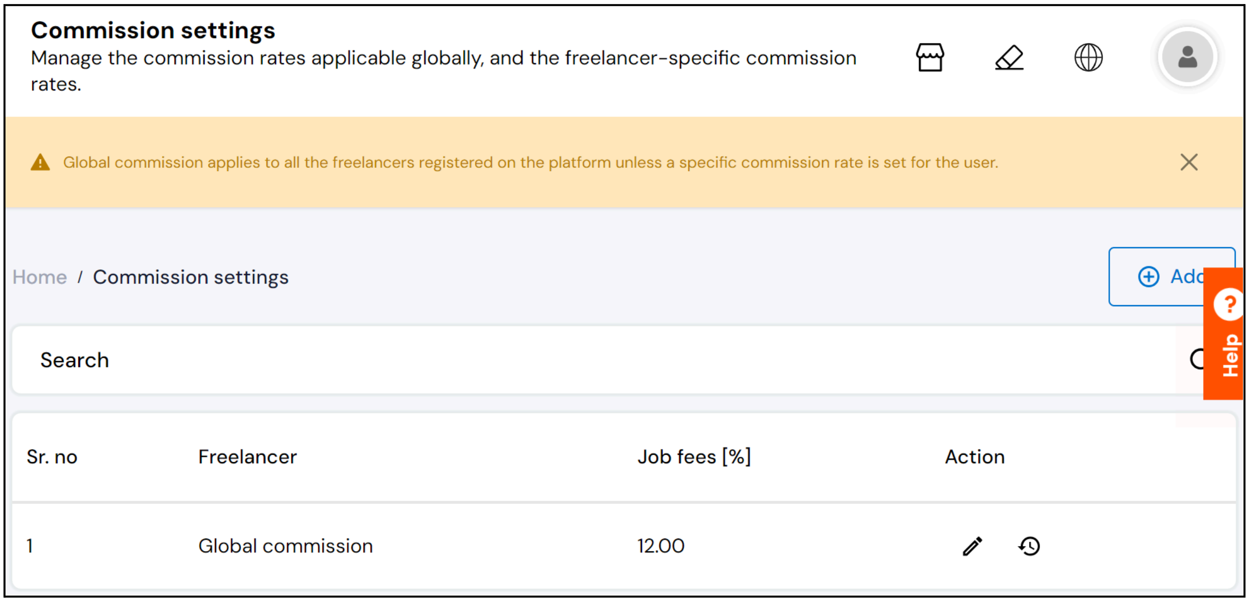
11. Update the Website commission settings

The next step is to update the website commission settings.

To do this, go to **Settings > Commission settings** to visit the **Commission settings** page.



Define the commission rate that will be charged by you (to the freelancers) on the platform.

There are two types of commission settings on the platform:

- **Default site commission:** Applicable for all the freelancers on the platform.

  By default, the default site commission detail is listed on this page. You can only edit the default site commission rate, but you cannot delete it from the list or assign it to a user (freelancer).

  This defined commission is used for those freelancers for whom no specific commission has been set.

- **Freelancer-specific commission:** Applicable for the respective freelancer for whom the commission rate is set.

  This submodule allows you to define freelancer-specific commission rates. And once you define a freelancer-specific rate, this rate is given a higher priority and overrides the default site commission rate.

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To explain better, let us assume you set the default site commission as 5%, and create a freelancer-specific commission for a freelancer named ‘Tony’ as 7%.

In this case, Tony will be charged 7% commission for all jobs completed, while other freelancers (whose freelancer-specific commissions rates were not defined) will be charged 5% commission for all the jobs they complete.

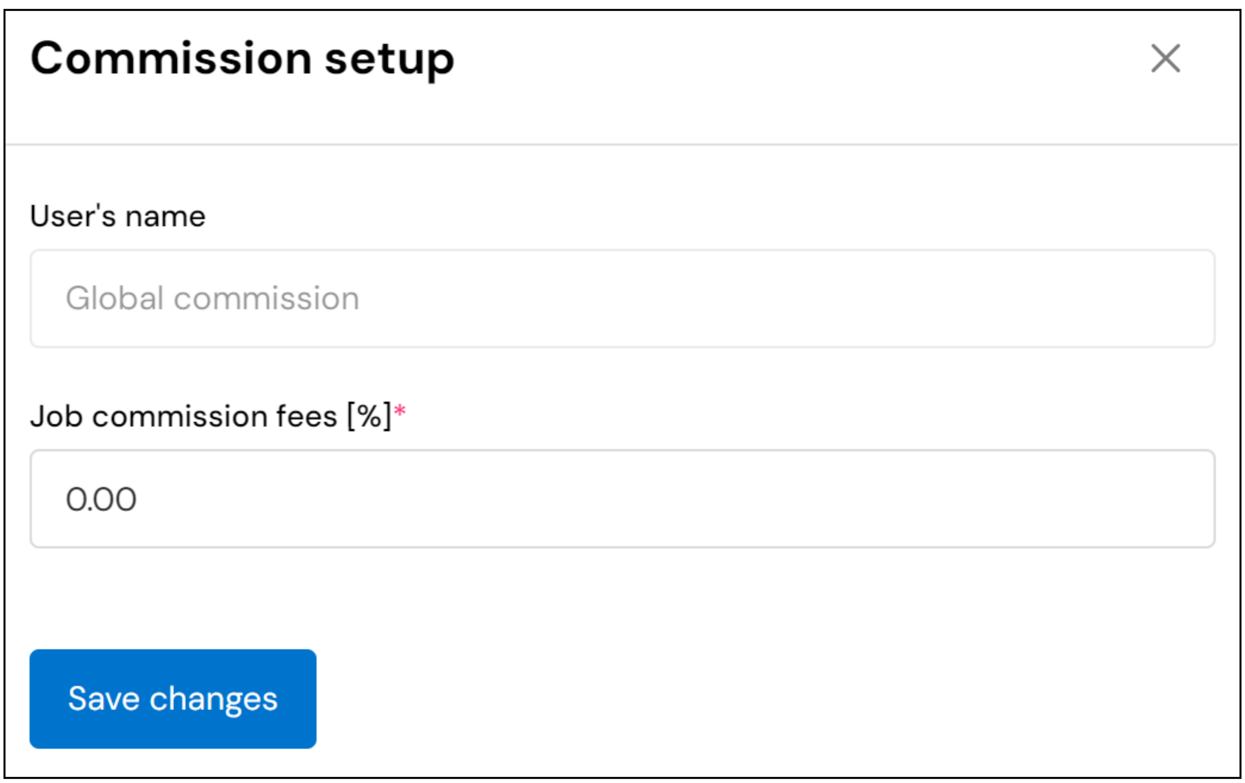
In short, you can define different commission rates for all the freelancers on the platform.

*However, since you are currently **Getting started**, and there are no freelancer profiles yet, you are only required to update the default site commission. You can return to this page later, once the platform has a few freelancers, to define freelancer-specific commission rates for them.*

Default site commission

Click the **edit button** beside the Global commission entry.

The **Commission setup** form appears.



There are two fields under this form, one is editable and the other cannot be edited (since it is the global commission):

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **User's name:** This field will have the name - global commission. This field is not editable.
- **Job commission fees [%]:** Enter the commission fee that will be charged for each job completed on the platform by the freelancer.

  By default, this field will have the value 0. Change it as per your requirements.

  Keep in mind that the value is a percentage value.

  If you do not want to use this commission at all, then the best way around it is to keep the commission fee as 0.

Once done, click **Save changes** to update the details.

The form will automatically close and the commission rate will be updated accordingly.

*Refer to the **Admin manual** to learn more about all the features under this page.*

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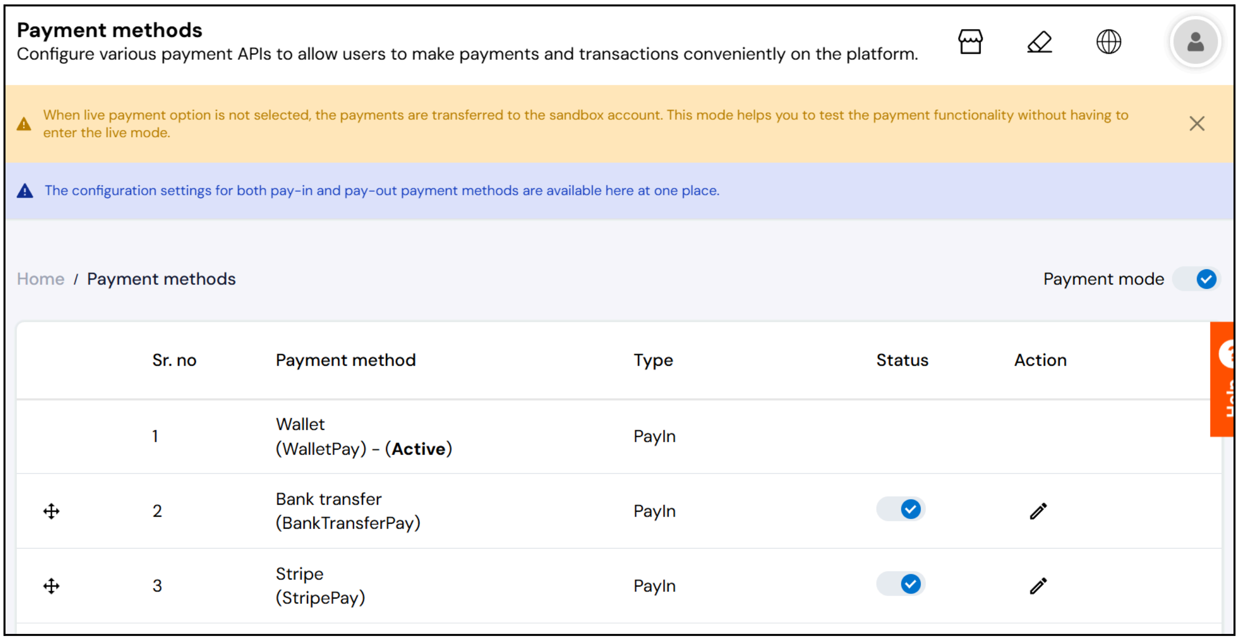
12. Configure the payment methods

The next step includes configuring the payment methods of the platform. To do this, go to **Settings > Payment methods.** This will direct you to the **Payment methods** page.



Set up various payment methods that you want to offer to the users of the platform.

Yo!Gigs allows the users to complete transactions using a number of payment methods (third-party APIs) and the system's own digital wallet. By default, there are 10 payment methods integrated into the Yo!Gigs platform.

These payment methods are divided into three types:

- **PayIn:** These payment methods are displayed and used on the checkout page (when paying for a job, a gift card, and so on).

  There are 7 payIn payment methods on the platform:

  - PayPal standard
  - Stripe
  - Authorize.Net
  - PayGate
  - Paystack

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- Bank transfer
- Wallet

- **Payout:** These payment methods are used by freelancers and clients (displayed on their dashboard) for requesting to withdraw funds from their wallet. When a request is made using any one of these payment methods, the amount requested is sent on the selected payout method.

  There are 2 payout methods on the platform:

  - **PayPal payout (Semi automatic method)** - A user can request to withdraw funds from their wallet into their PayPal account.

    When this request is placed, the request will be listed under **Users > Wallet withdrawal requests**. You are required to visit this submodule, review the request and either accept or reject the request.

    When you reject the request, the update is shared with the respective user and no action is taken on the amount.

    When you accept the request, the amount is sent automatically to the user's PayPal account from your PayPal account (which you should have added under the PayPal payout settings) - and after the set transaction fee is deducted.

  - **Bank payout (manual method)** - This payout method is marked as a manual method because you (the admin) will have to manually send the payment to the respective user's bank account using the bank details they shared.

    Basically, the system cannot take any action for the bank transfer payment method.

    Once a request is placed, it can be viewed under the **Users > Wallet withdrawal requests** submodule. If you approve the request, send the amount to the respective user's bank account (using the bank details they shared).

    Remember to deduct the transaction fee you have set up from your end (from the total amount they requested) for the process since the system is not handling this process.

    Once the amount has been sent from your side, update the request's status under **Users > Wallet withdrawal requests**.

- **Split payment:** This feature automates payment distribution, ensuring that each recipient receives their share instantly.

There is only one split payment method incorporated into the platform.

- **Stripe Connect (Split payment method) -** This payment method automates payment distribution.

  When a client makes a payment using **Stripe Connect**, the system automatically splits the payment between the freelancer and you (the admin). This eliminates the need for manual fund transfers.

  To use Stripe Connect, you (the admin) must first configure the required settings under the [Stripe Connect settings](). Freelancers must also link their Stripe accounts to receive payments directly.

  Since the payment is split and processed instantly, there is no need for withdrawal requests from freelancers when this method is used.

Configure and activate the payment methods you want for the platform via this page.

Points to note

- You have to configure at least one of the payment methods for the website to begin business.
- This is mainly because you (the admin) do not have a wallet on the platform, unlike other users.
- All the money received by any user can only be sent to your linked account (under that payment method) directly. This account can be your bank account, PayPal account or whatever payment method you have configured under this section.
- The platform also supports **Offline payment mode**, where transactions are handled outside the platform.
- So, if you do not have to configure an online payment method, you can activate **Offline payment mode** to start your business. However, in this case, you will be responsible for manually managing all financial transactions.

To control whether payments are processed within the platform or externally, you can set the **Payment mode** for your platform.

Payment mode

The Payment mode toggle switch, located at the upper right corner of the Payment methods page.

- Turn **on** this toggle switch to activate live payment mode, where payments can be made online using the third-party payment gateways that have been configured and activated.

  If you have activated online Payment mode, you must [configure the payment methods](#) to process online transactions.

- Turn **off** this toggle switch to set the platform to offline mode. In this case, no payments are processed within the system, and all financial transactions must be handled externally by you.

Configure the payment method

If you have activated online payment mode, the next step is to configure the third-party payment methods available on the platform.

To do this, click the **edit button** beside a payment method to configure it.

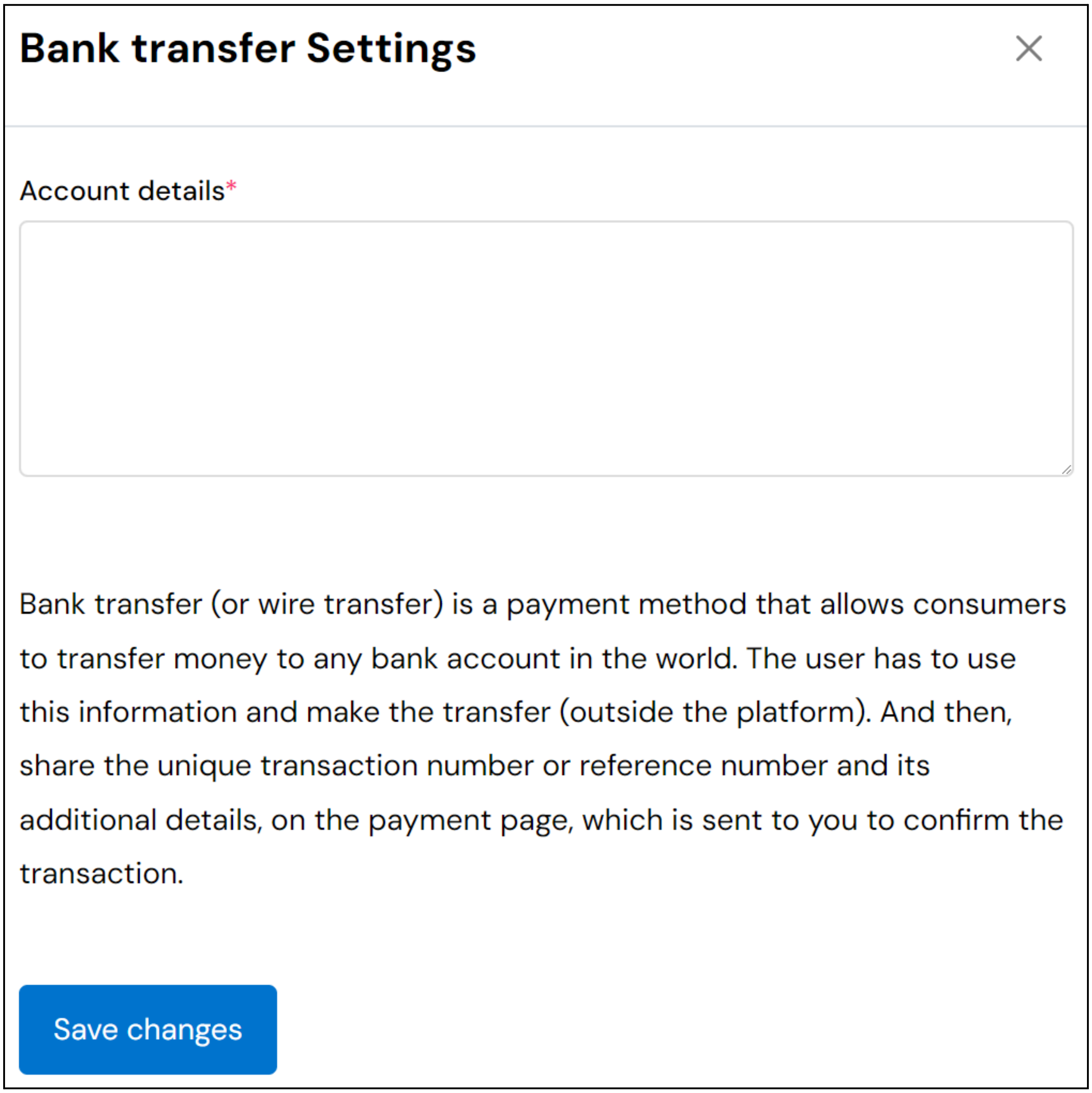
*The **Wallet payIn** method (it is a system wallet) and the **Bank payout** method (doesn't need to be configured as you will have to manually transfer the amount via your bank) don't have this button beside them.*

*Additionally, every other payment method has a different configuration process and a **different form**.*

a. Bank transfer (payIn)

Bank transfer (or wire transfer) is a payment method that allows users to transfer money to any bank account around the world.

Click the **edit button** and the **Bank transfer settings** form appears.



There is only one field under this form, edit accordingly:

- **Account details*:** Enter your bank account details including the bank name, account number, account name, IFSC/SWIFT code, and any other information that is important to make a transfer as per your country's norms.

Click **Save changes.**

The details will be updated and the form will close automatically.

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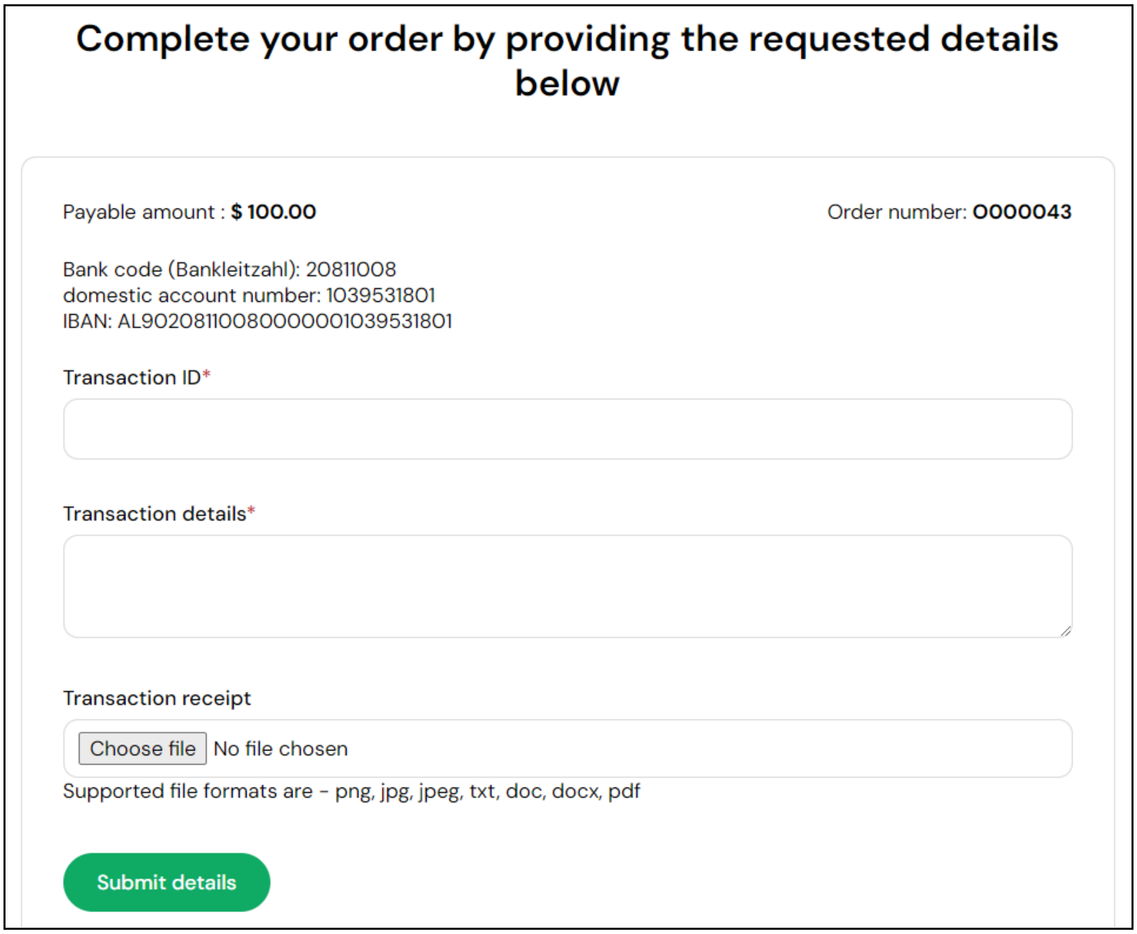
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

How does it work?

The bank transfer method is the only one that is not managed by the system and has to be managed manually.

When a user selects the bank transfer payment method to make a payment, they will be directed to a form displaying your bank details (as shown below).



Complete your order by providing the requested details below

Payable amount : **$ 100.00**

Order number: **0000043**

Bank code (Bankleitzahl): 20811008
domestic account number: 1039531801
IBAN: AL90208110080000001039531801

Transaction ID*

Transaction details*

Transaction receipt

Choose file No file chosen

Supported file formats are - png, jpg, jpeg, txt, doc, docx, pdf

Submit details

The user will have to manually make the payment to your bank account using the information provided.

Once the payment has been made, the user will have to add the following details in this form:

- **Transaction ID*:** Enter the transaction ID.
- **Transaction details*:** Enter any additional transaction details.
- **Transaction receipt:** Upload the transaction receipt as proof of payment by clicking the '**Choose file**' button, selecting an image from the system and uploading it.

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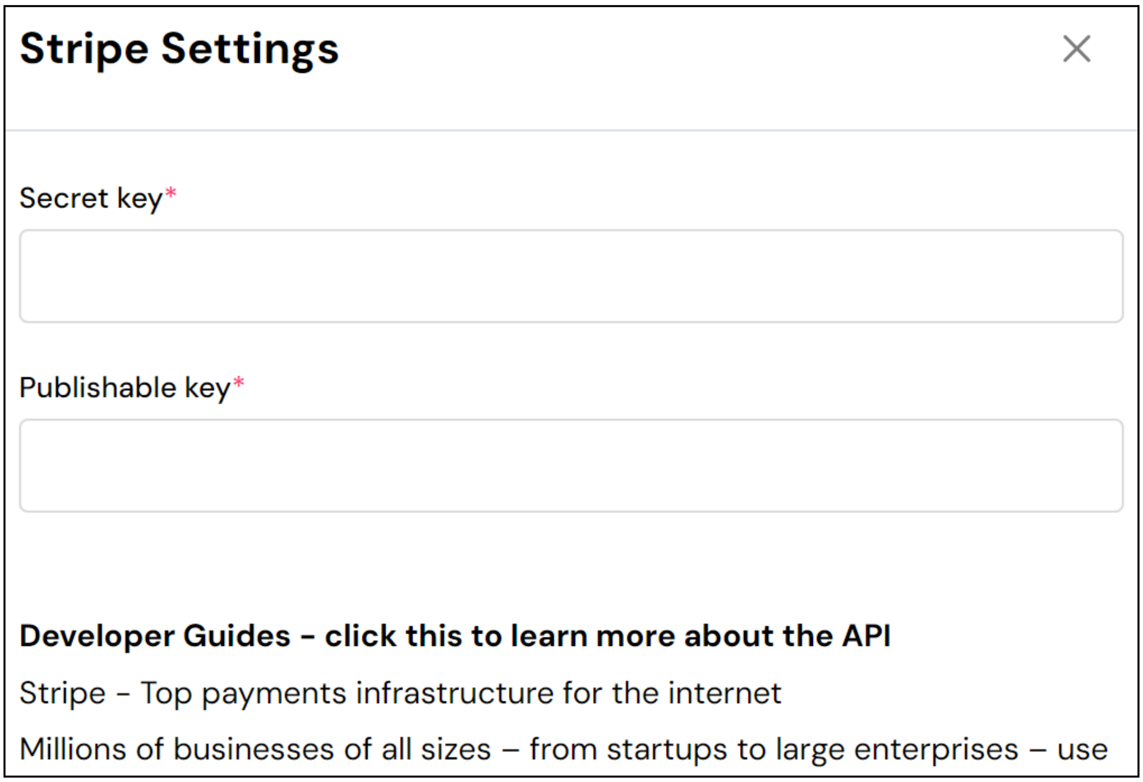
Once done, click **Submit details**.

These details are then added to the order details page. Review the transaction details shared under the respective job order details page (**Orders > All orders > View icon**).

b. Stripe (payIn)

Stripe is a payment service provider that you can use to accept dozens of payments through debit and credit cards from anywhere around the globe. Stripe charges a fee on each transaction.

Click the edit button and the **Stripe settings** form appears.



Follow the steps shared on - [Yo!Gigs- Stripe Keys Setup Guide] to generate the configuration keys.

Enter the generated keys in this form:

- **Secret key*:** Enter the secret key.
- **Publishable key*:** Enter the publishable key.

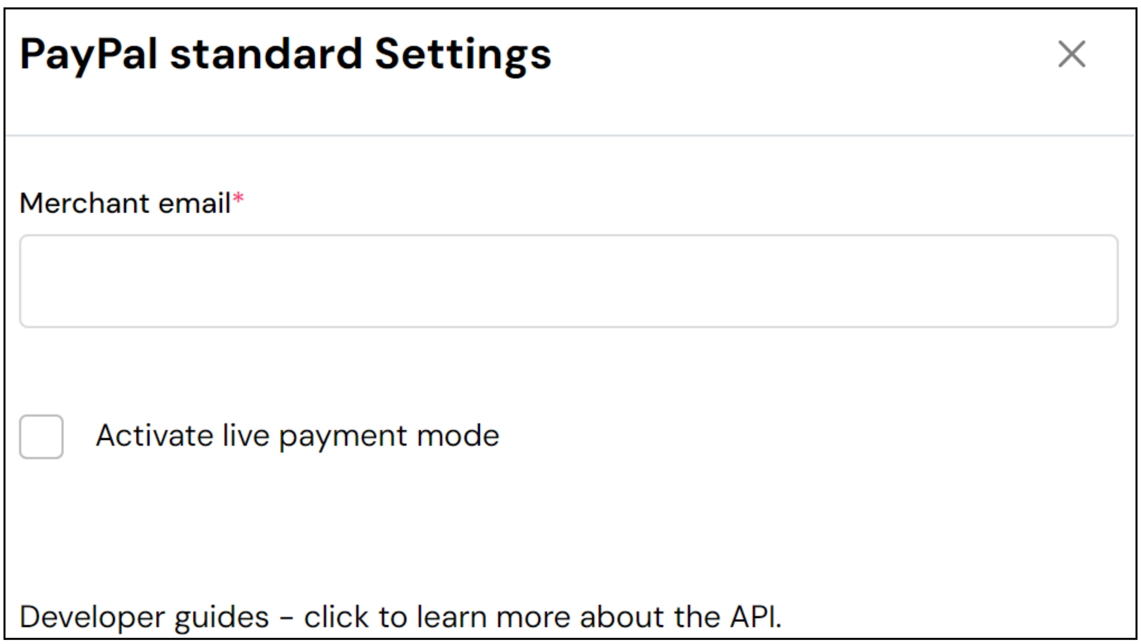
*Click the '**Developer guides**' link below the field. This will direct you to Stripe developer's help section allowing you to learn more about it.*

Click **Save changes**. The details will be updated and the form will close automatically.

c. PayPal standard (payIn)

PayPal serves as a middleman between your bank and merchants. It keeps your payment information secure, while you easily receive payment in your account. And PayPal standard is an API that provides payment buttons as a quick and easy solution for accepting payments, when integrated into your system.

Click the edit button beside the PayPal standard payIn method to configure it. The **PayPal standard settings** form appears.



Follow the steps shared on - [Yo!Gigs- PayPal Standard Keys Setup Guide] to configure your email address which will be added here:

- **Merchant email*:** Enter the merchant email.

  This is the email on which the payments will be received. This can be your own email address or the email address of the company, for which a PayPal Business account has been created.

- **Activate live payment mode:** Check mark this to activate the live payment environment (mode) based on the settings you added to your merchant account.

  Deselect it if you want to use the sandbox environment. To explain better:

  - **Sandbox:** Sandbox environment is a testing environment. This environment allows users (mostly developers) to imitate the characteristics of a production environment while testing the application.

    Leave the checkbox unselected or deselect it when you are just testing to see how the plugin works. Changes made with this environment and key will not affect the platform.

  - **Production:** Also known as the Live API code, this environment makes the plugin go live. In this case, if any changes are made on the platform using this plugin, it will be a permanent change.

    For example, if you are using a live code for a payment method plugin, when you place an order, the payment will be deducted from your account.

i *Click the '**Developer guides**' link below the field. This will direct you to the PayPal developer's help section allowing you to learn more about it.*

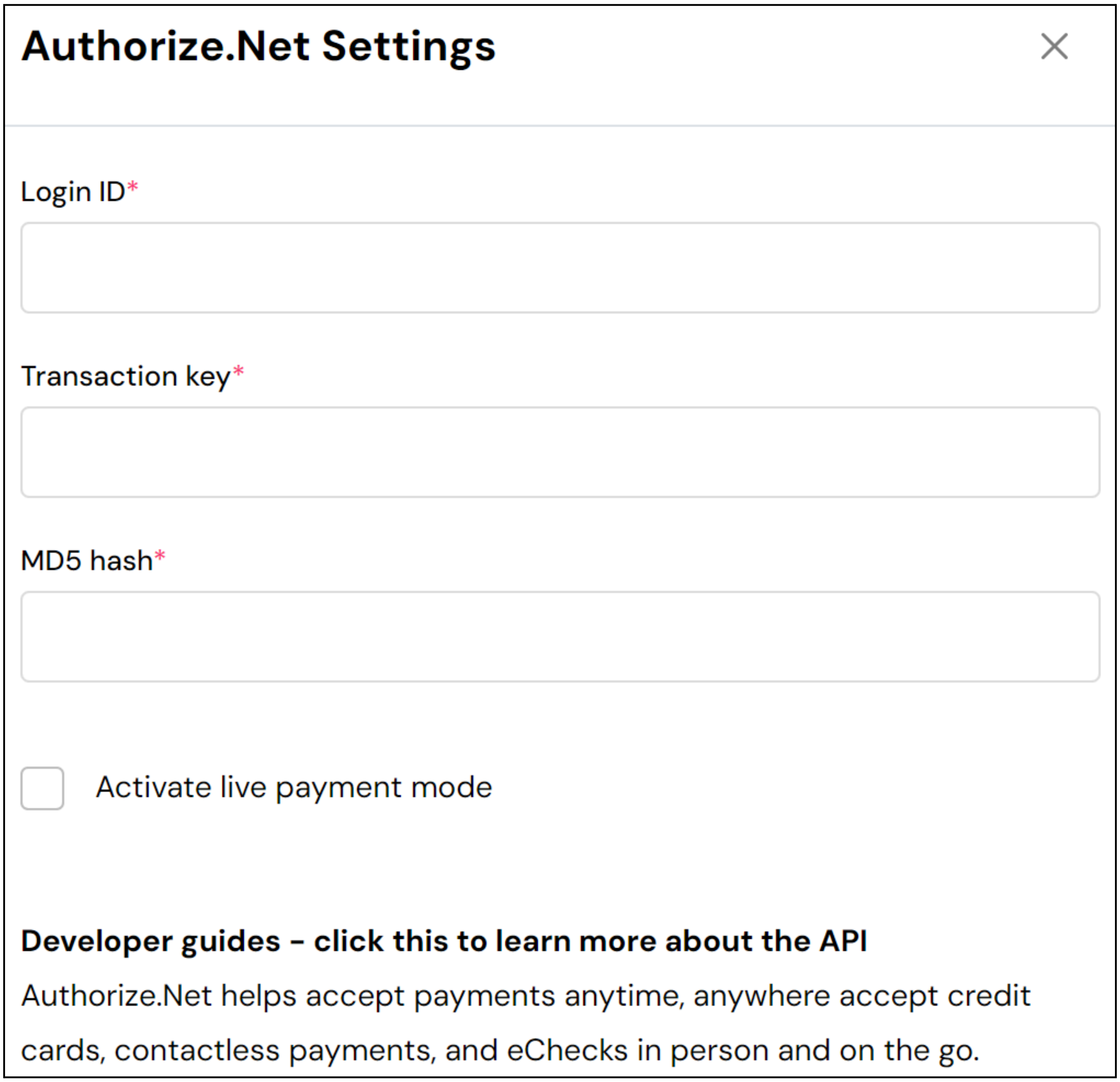
Click **Save changes**.

The details will be updated and the form will close automatically.

d. Authorize.Net (payIn)

Authorize.Net helps make it simple to accept electronic and credit card payments in person, online or over the phone.

Click the edit button beside the Authorize.net payIn method and the **Authorize.Net settings** form appears.



Follow the steps shared on - **[Yo!Gigs- Authorize.Net Keys Setup Guide]** to generate the configuration keys.

Enter the generated keys in this form:

- **Login ID*:** Enter your login ID that was used for your Authorized.net account.
- **Transaction key*:** Enter the transaction key.
- **MD5 hash*:** Enter the MD5 hash generated.
- **Activate live payment mode:** Check mark this to activate the live payment environment (mode) based on the keys you obtained.

Deselect it if you want to use the sandbox environment.

To explain better:

- **Sandbox:** Sandbox environment is a testing environment. Obtaining the keys of a sandbox environment and integrating it in the system, allows users (mostly developers) to imitate the characteristics of a production environment while testing the application.

  Leave the checkbox unselected or deselect it when you are just testing to see how the plugin works. Changes made with this environment and key will not affect the platform.

- **Production:** Also known as the Live API code, obtain the product keys and integrate them into the system to make the plugin go live.

  In this case, if any changes are made on the platform using this plugin, it will be a permanent change.

  For example, if you are using a live code for a payment method plugin, when you place an order, the payment will be deducted from your account.

Ensure that the keys match the environment, else it won't work and can create errors.

*Click the '**Developer guides**' link below the field. This will direct you to the Authorize.net developer's help section allowing you to learn more about it.*

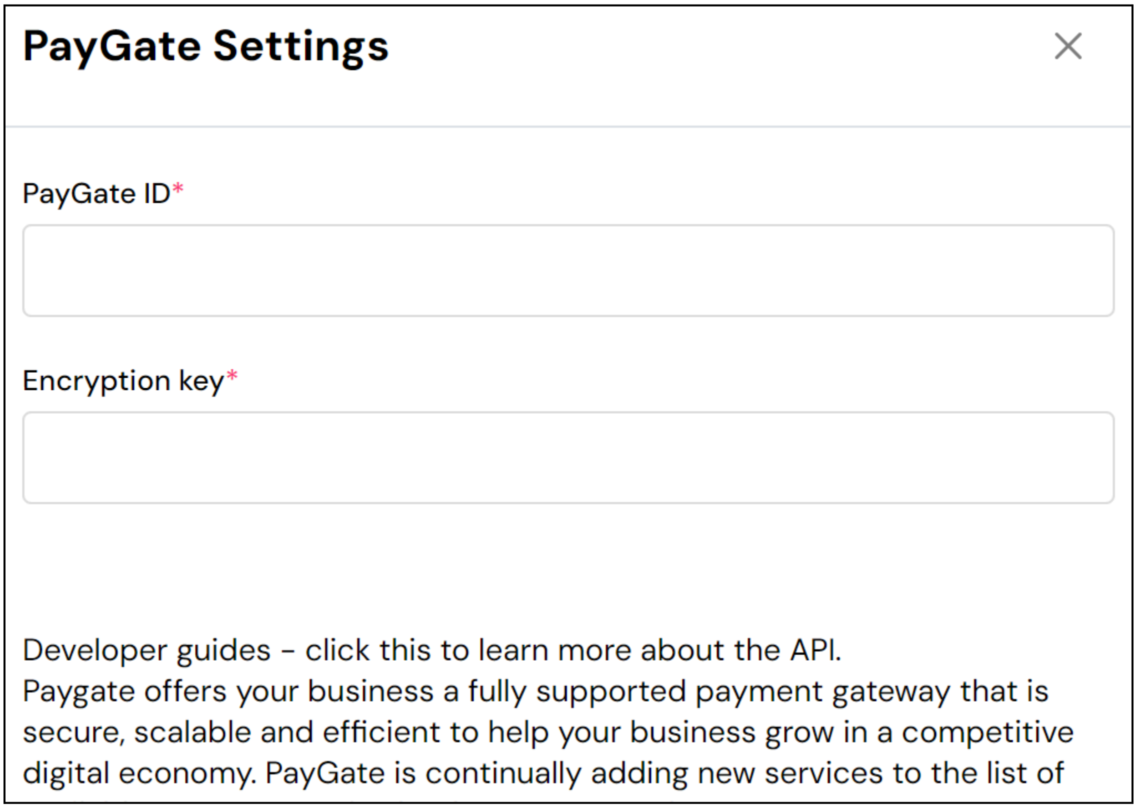
Click **Save changes.**

The details will be updated and the form will close automatically.

e. PayGate (payIn)

PayGate offers businesses all over the globe with a wide range of payment services and credit card processing services.

Click the edit button beside the PayGate payIn method and the **PayGate settings** form appears.



Follow the steps shared on - **[Yo!Gigs- PayGate Keys Setup Guide]** to generate the configuration keys and details.

Enter the generated keys in this form:

- **PayGate ID*:** Enter the PayGate ID generated.
- **Encryption key*:** Enter the encryption key generated.

*Click the '**Developer guides**' link below the field. This will direct you to PayGate developer's help section allowing you to learn more about it.*

Click **Save changes**. The details will be updated and the form will close automatically.

f. Paystack (payIn)

Paystack Payments Limited offers an online payment platform and a Point-of-Sale (PoS) terminal deployment and support service that allows users to make seamless, stress-free payments for desired goods and services online.

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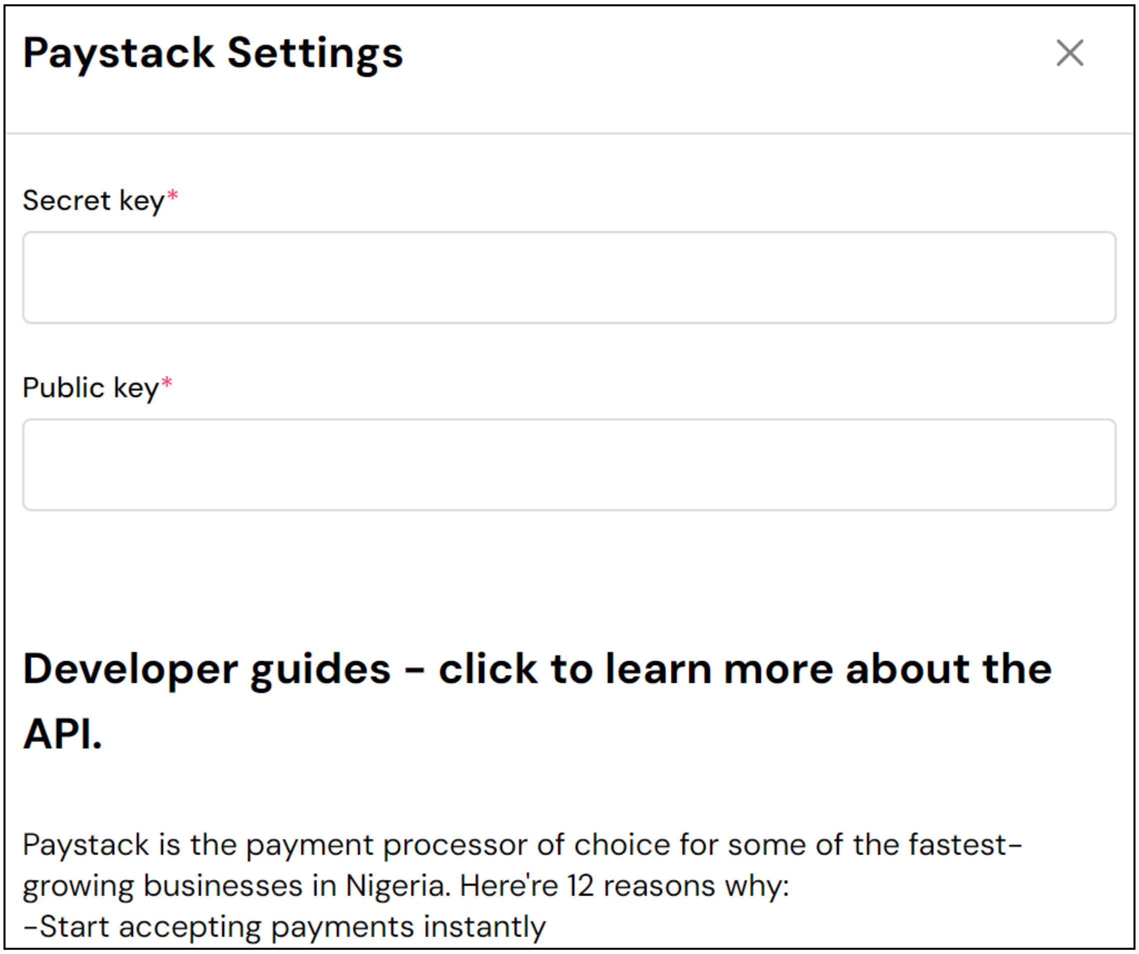
Click the edit button beside the Paystack payIn method and the **Paystack settings** form appears.



Follow the steps shared on - [Yo!Gigs- Paystack Keys Setup Guide] to generate the configuration keys and details.

Enter the generated keys in this form:

- **Secret key*:** Enter the secret key generated.
- **Public key*:** Enter the public key generated.

*Click the '**Developer guides**' link below the field. This will direct you to Paystack developer's help section allowing you to learn more about it.*

Click **Save changes**. The details will be updated and the form will close automatically.

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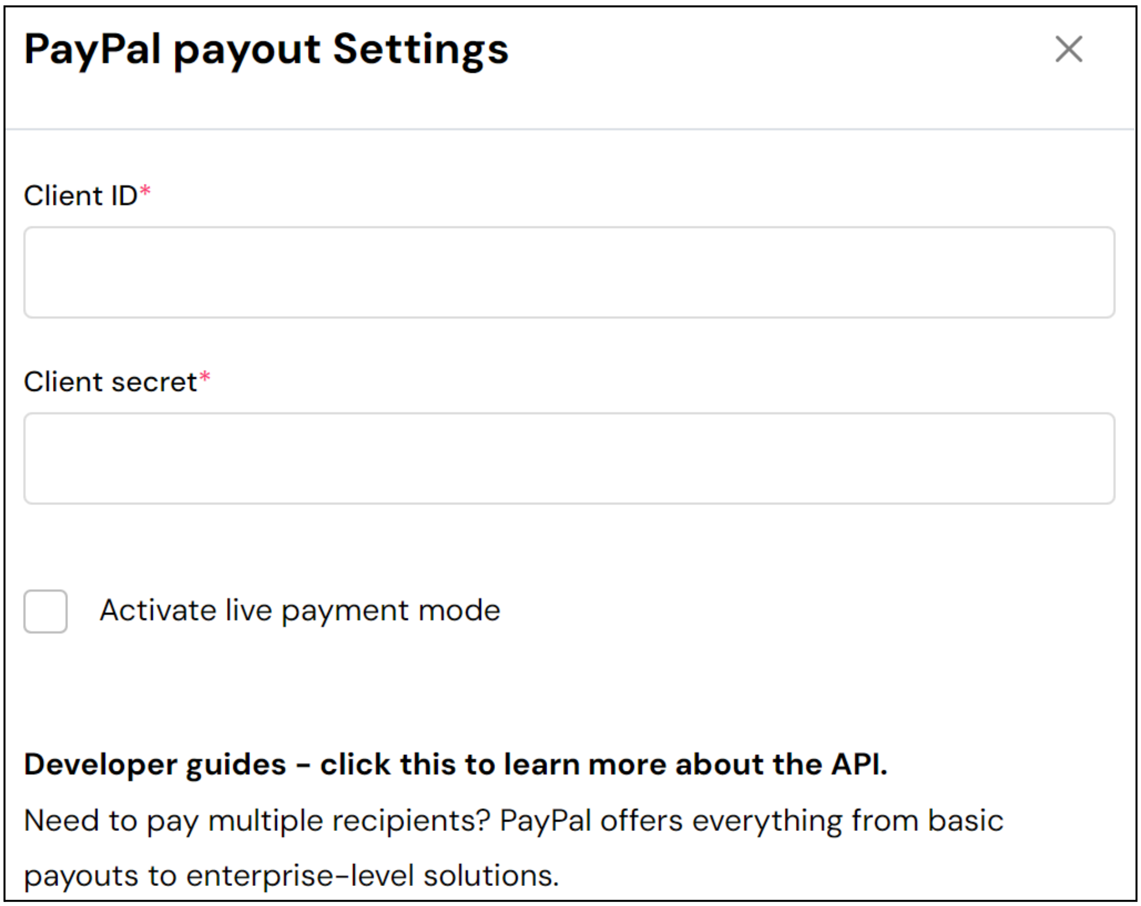
g. PayPal payout

PayPal offers everything from basic payouts to enterprise-level solutions. PayPal payouts enable you to send up to thousands of payments at a time by using a CSV file.

Click the edit button beside the PayPal payout method and the **PayPal payout settings** form appears.



Follow the steps shared on - [Yo!Gigs- PayPal Payout Keys Setup Guide] to generate the configuration keys and details.

Enter the keys generated in this form:

- **Client ID*:** Enter the client ID generated.
- **Client secret*:** Enter the client secret generated.

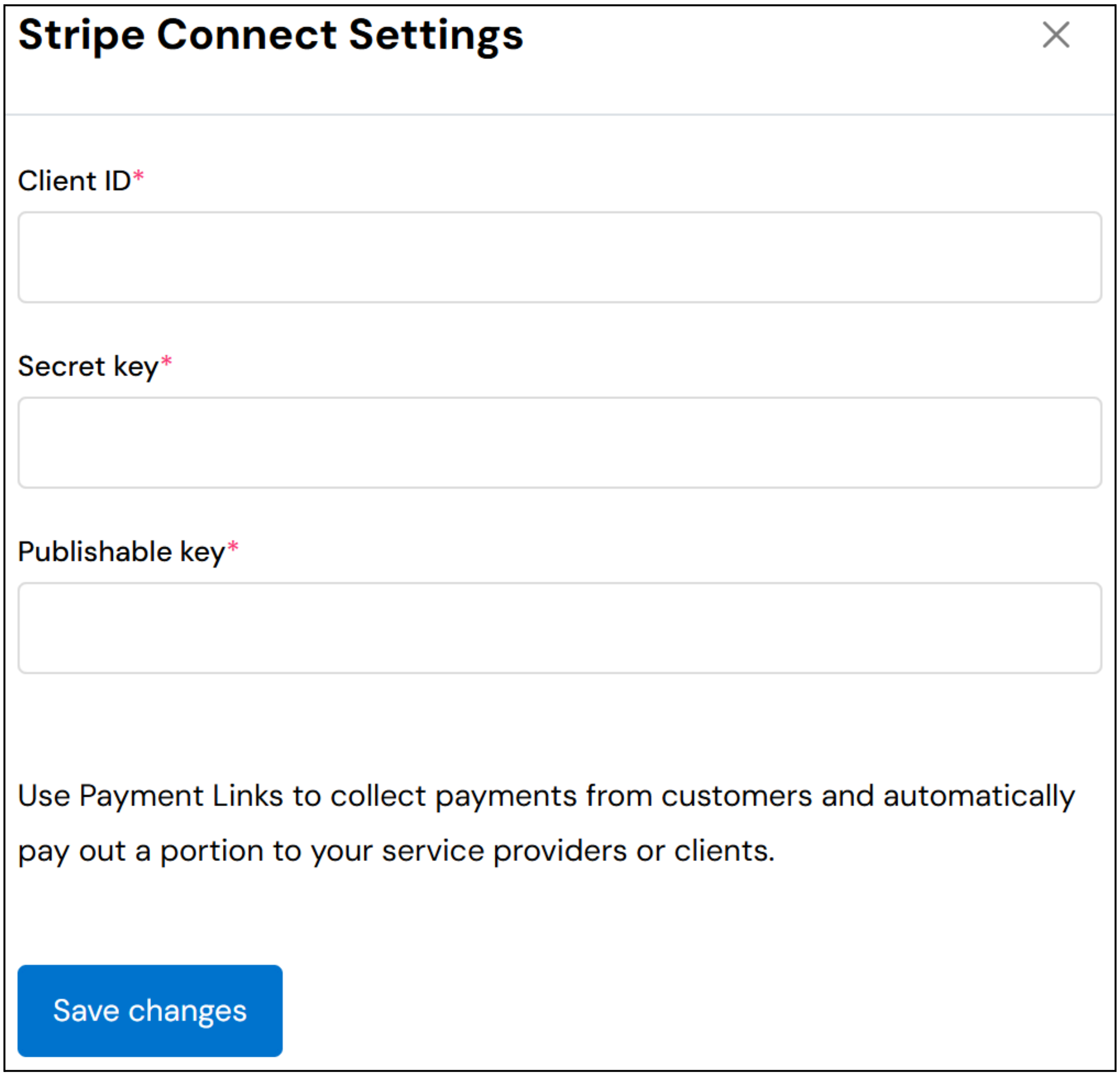
*Click the '**Developer guides**' link below the field. This will direct you to the PayPal payout developer's help section allowing you to learn more about it.*

Click **Save changes**. The details will be updated and the form will close automatically.

h. Stripe Connect (split payment)

This plugin helps split payments and send them to the respective user's stripe accounts automatically and instantly as well.

Click the edit button and the **Stripe Connect settings** form appears.



Enter the generated keys in this form:

- **Client ID*:** Enter the client ID
- **Secret key*:** Enter the secret key.

- **Publishable key*:** Enter the publishable key.

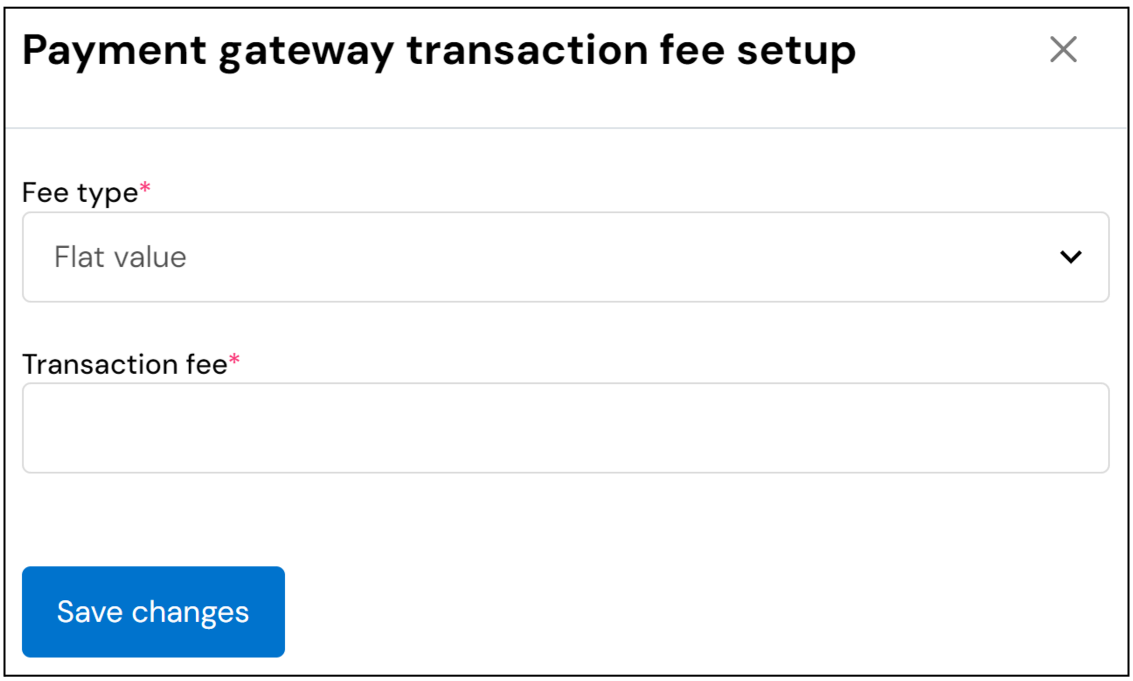
Click **Save changes**.

The details will be updated and the form will close automatically.

Update the transaction fee

Next, update the transaction fee for the applicable payout options - **Bank payout** and **PayPal payout**.

Click the **transaction fee button** beside the respective payment method to configure it.



The **Payment gateway transaction fee setup** form appears. For both the payment methods, the transaction fee form is the same.

Update the following:

- **Fee type*:** Select the type of fee that will be charged on the amount being withdrawn via the respective payout method.

  Click the field and a dropdown list will appear with the following options:

  - Flat value

- Percentage

- **Transaction fee*:** Enter the transaction fee based on the fee type selected.

  For instance, if you select percentage as the fee type and add 10 in this field, it implies that the fee will be 10% of the total amount.

  And if you select flat as the fee type and add 10 in this field (and the default currency is USD), it implies that the fee is $10. So, for every withdrawal request, a flat fee of $10 will be applicable in this case.

Click **Save changes.**

The details will be updated and the form will close automatically.

This transaction fee amount is paid to you by the user. You can charge how much ever you want. However, you are liable to settle any Bank fees or PayPal fee that will be deducted from the user's end.

With this, your payment methods are configured.

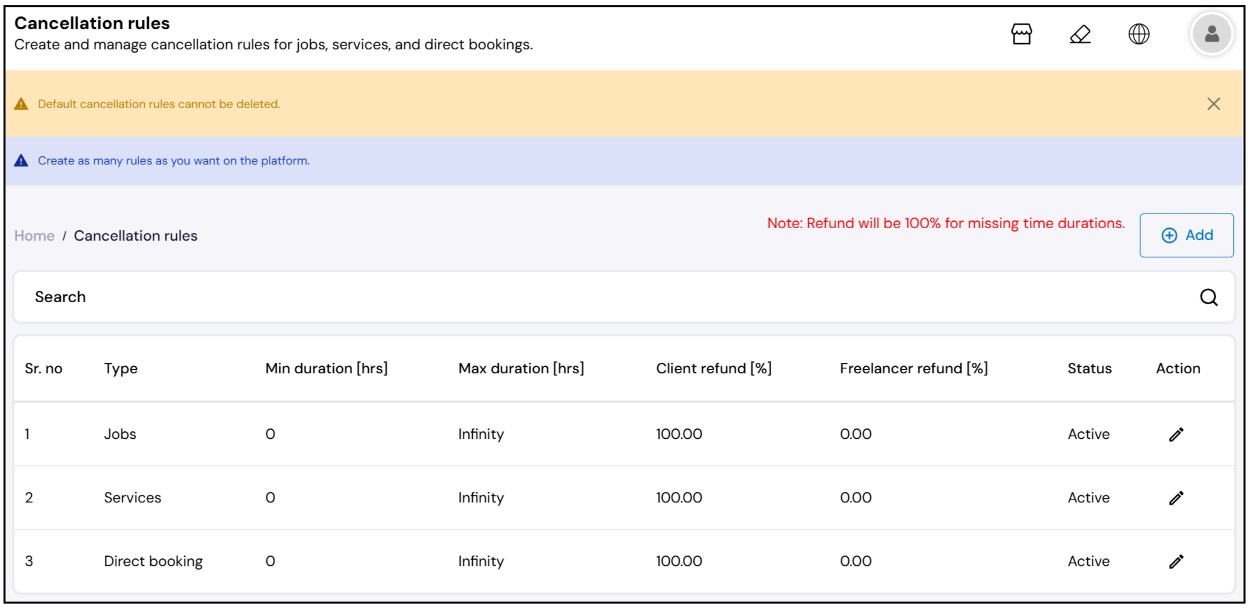
Move to the next step.

13. Cancellation rules

The next step involves setting up the cancellation rules.

The submodule allows you to define the refund percentage for both clients and freelancers when a cancellation occurs.

To set the cancellation rules, go to **Settings** > **Cancellation rules.**



The Min duration will be 0, max duration will be infinity and Client refund will be set to 100% for each type if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by setting up your own cancellation rules for **Jobs**, **Services**, and **Direct Booking**.

To do this, click **Add** from the upper-right corner of the page to open the **Cancellation rule setup form.**

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
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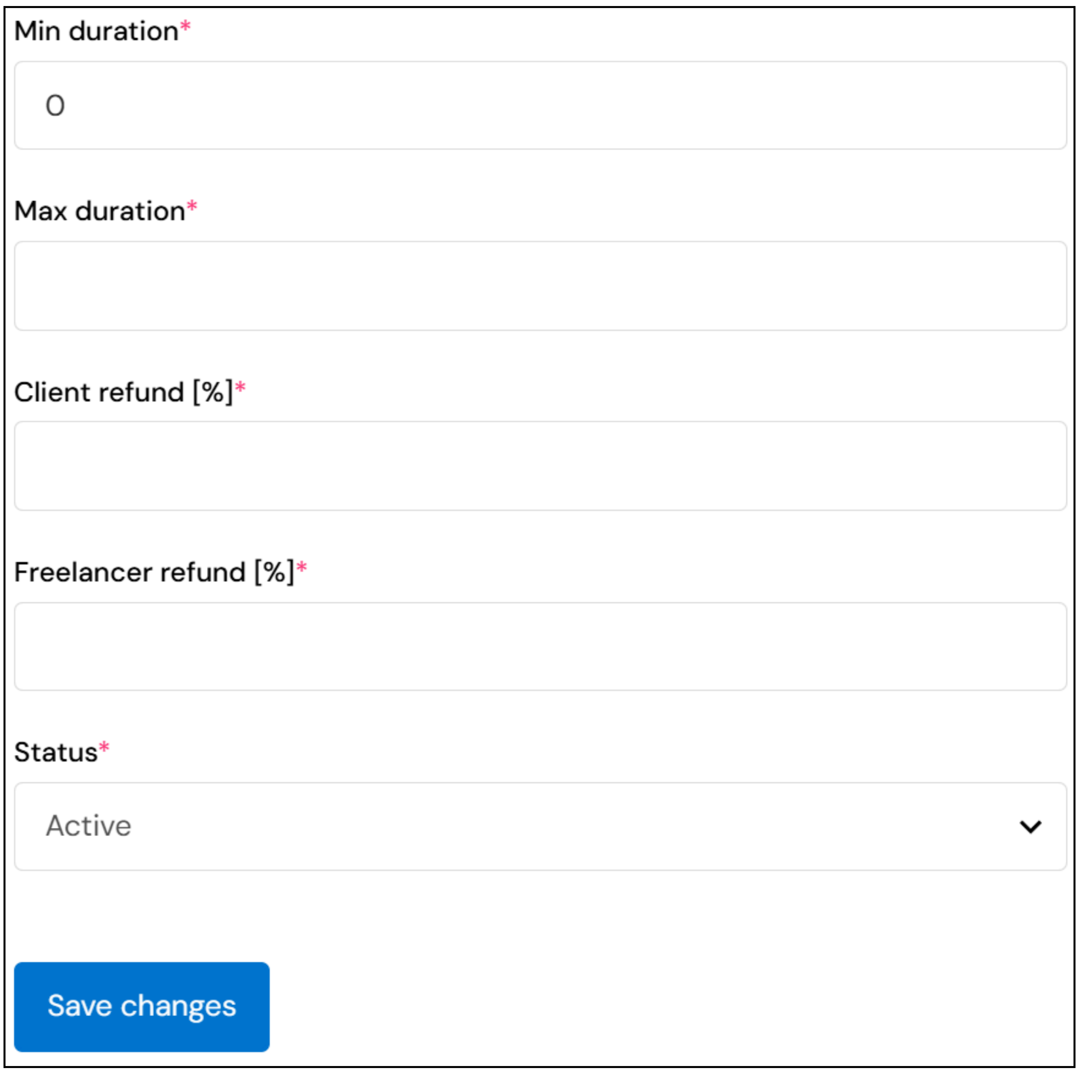
Enter the following:

- **Type*:** Select the type for which you want to set cancellation rules.

  To do this, click the field and a dropdown list of all the types on the platform will appear.

  - **Jobs:** Select this option to set cancellation rules for jobs listed on the platform.
  - **Services:** Select this option to set cancellation rules for services listed on the platform.
  - **Direct booking:** Select this option to set cancellation rules for client bookings made through direct booking.

Scroll down to update the rest of the fields under this form:



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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Enter the following:

- **Type*:** Select the type for which you want to set cancellation rules.

  To do this, click the field and a dropdown list of all the types on the platform will appear.

  - **Jobs:** Select this option to set cancellation rules for jobs listed on the platform.
  - **Services:** Select this option to set cancellation rules for services listed on the platform.
  - **Direct booking:** Select this option to set cancellation rules for client bookings made through direct booking.

- **Min duration*:** Enter the minimum duration (in hours) for which the rule will be applicable.
- **Max duration*:** Enter the maximum duration (in hours) up to when the rule will remain in effect.

  ! *While setting the min and max duration, note that a 100% refund will apply if the time duration is exceeded.*

- **Client refund [%]*:** Define the percentage of the amount that will be refunded to the client upon cancellation.
- **Freelancer refund [%]*:** Define the percentage of the amount that will be refunded to the freelancer in case of a cancellation.
- **Status*:** Select the status of the cancellation rule.

  To do this, click the field and select "**active**" to mark the cancellation rule as active and publish it on the platform.

  Select "**inactive**" to hide the cancellation rule for the time being, on the platform. With this, the rule added will not apply to clients or freelancers during cancellations.

Once done, click **Save changes.**

i *The default column updates automatically, setting its min value to the max value of the recently added type, while its max value remains infinity.*

Multiple rules can be set, but the default column's max value will always be infinity. The default column fields for each type cannot be edited, except for the Freelancer refund and Client refund fields.

Once done, close the form by clicking in the upper-right corner of the form.

With this, the cancellation rule will be added to the list.

Following the same steps, add as many rules to the list that you want on the platform.

Use the **edit button** beside a cancellation rule to edit its information and the **delete button** beside it to delete the rule from the system.

*Refer to the **Admin manual** to learn more about all the features under this page.*

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14. Discount coupons

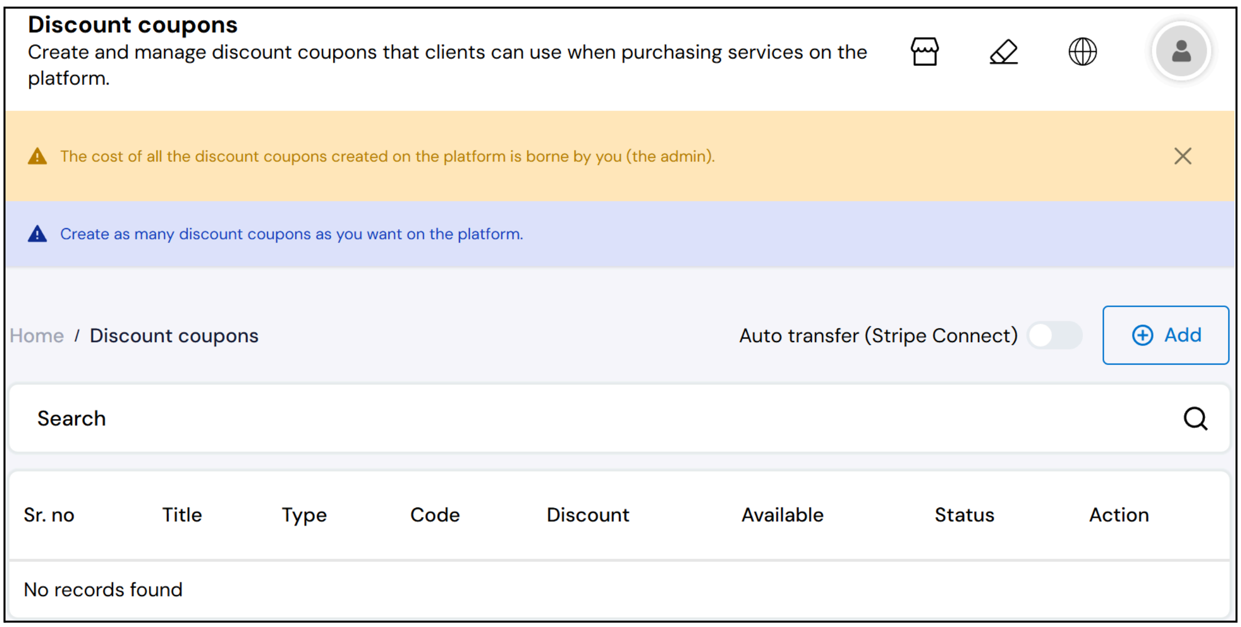
The next step involves setting up the discount coupons.

This page allows you to create and manage discount coupons that clients can use when purchasing services on the platform.

The platform processes discounts in real time during purchase, updating the final payable amount accordingly.

The cost of all the discount coupons created on the platform is borne by you (the admin).

To create discount coupons, go to **Settings** > **Discount coupons.**



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by adding a coupon on the platform.

To do this, click **Add** from the upper-right corner of the page to open the **Coupon setup** form.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
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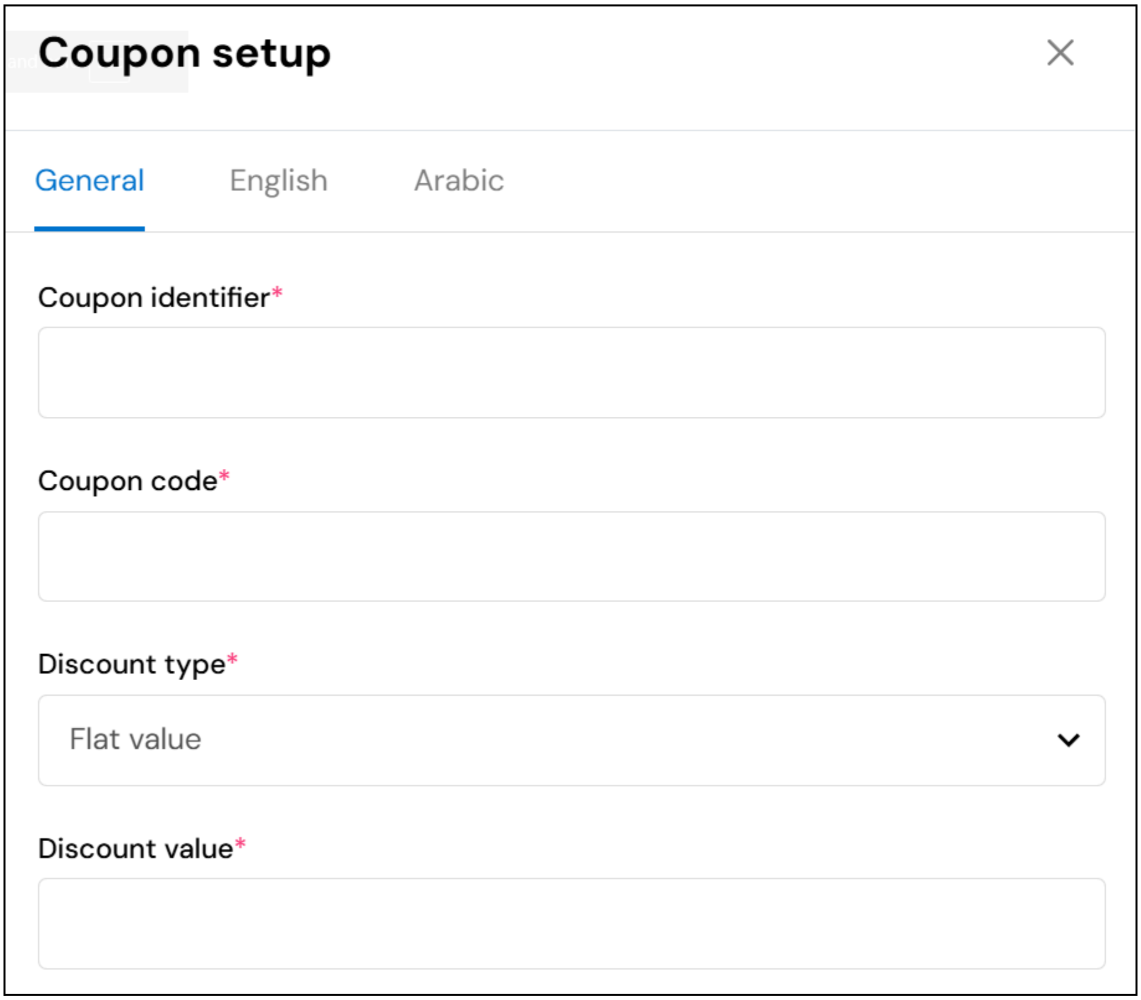

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

General tab

Update the following:

- **Coupon identifier*:** Enter the coupon identifier.

  It can be the same as the coupon name or title, which will be defined under the language data tab.

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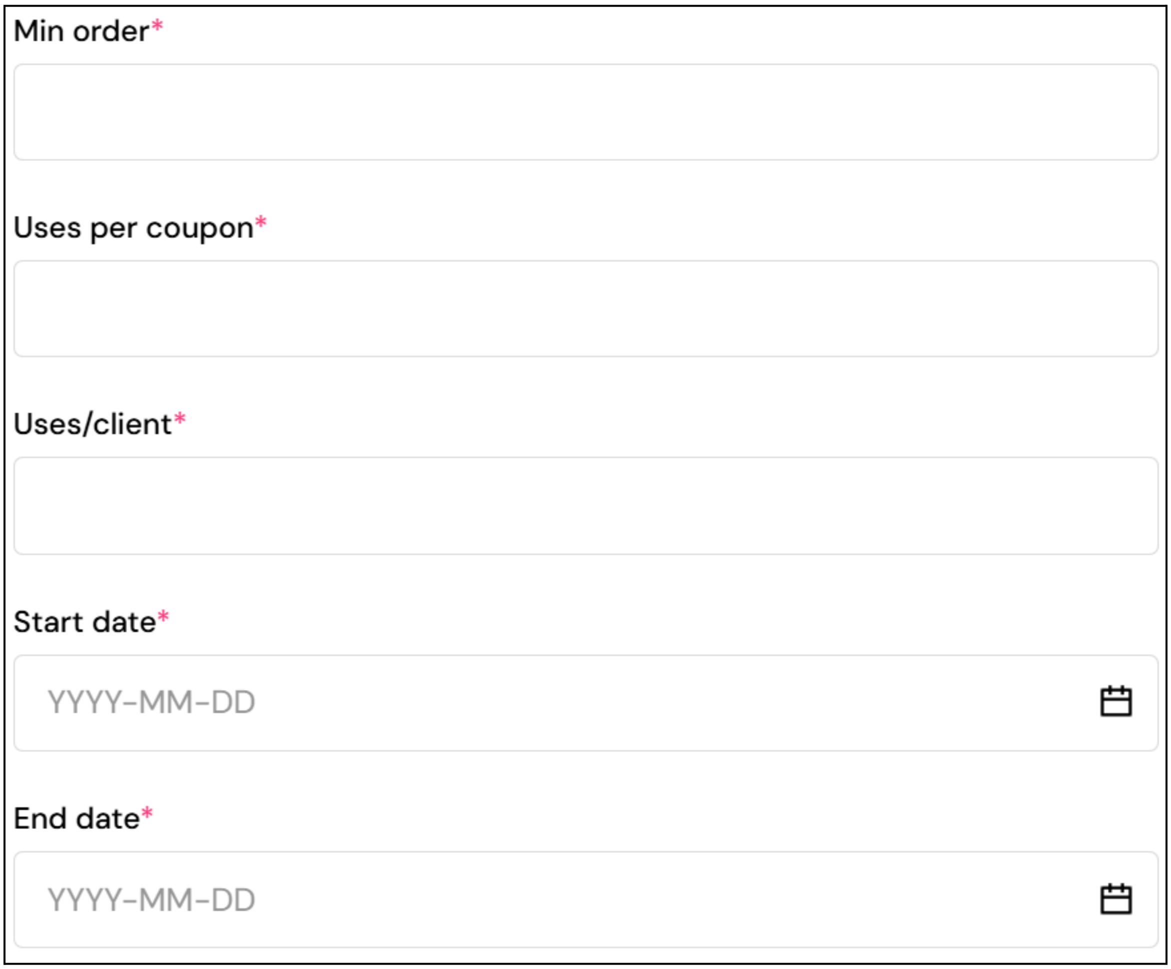
An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

Ensure that the identifier is unique and unlike any other section identifier, else an error message will appear.

- **Coupon code*:** Enter the code that clients will use to avail of the discount.
- **Discount type*:** Select the discount type.
- To do this, click the field and a dropdown list will appear.
    - Flat value
    - Percentage
- **Discount value*:** Enter the discount amount based on the selected discount type.

Scroll down to update the next fields under this forms:



- **Min order*:** Enter the minimum order amount required for the coupon to be applicable.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Uses per coupon*:** Enter how many times the coupon can be used in total across all clients.
- **Uses/client*:** Enter how many times an individual can use the coupon.
- **Start date*:** Enter the date from which the coupon will be valid.
- **End date*:** Enter the expiry date for the coupon.

Scroll down to update the rest of the fields under this form:

- **Status*:** Select the status of the discount coupon.

  To do this, click the field and select "**active**" to mark the discount coupon as active and publish it on the platform.

  Select "**inactive**" to hide the discount coupon for the time being, on the platform. With this, clients won't be able to use that discount coupon.

Once done, click **Save changes**.

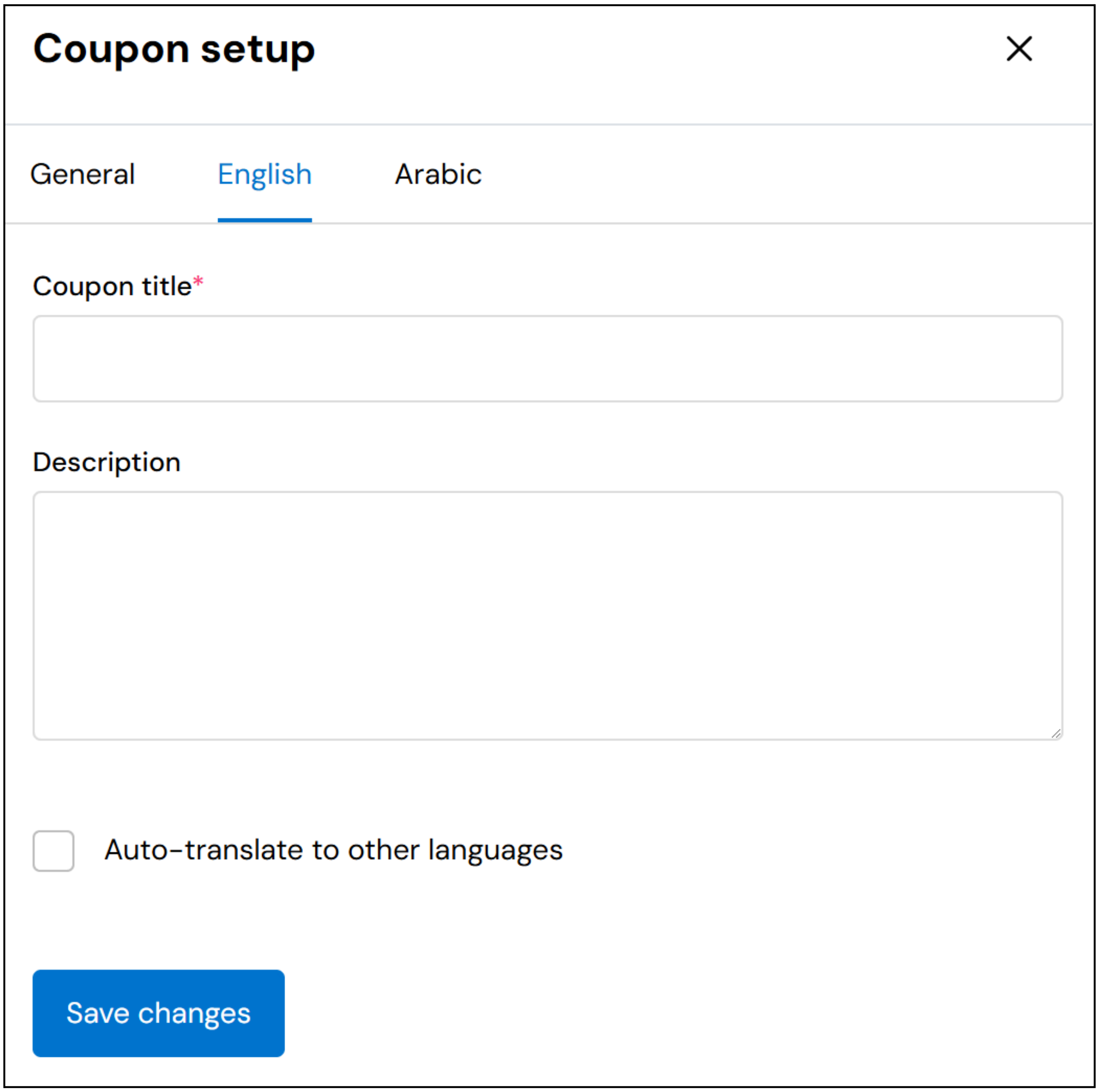
This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the discount coupon to be published.

Since **English** is set as the default language, this tab is called the English tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Update the following:

- **Coupon title*:** Enter the title for the coupon in the default language.

  This title will be displayed wherever applicable on the platform.

- **Description:** Enter a description of the discount coupon. This is not displayed on the platform and is just for you.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations >** [Third-party APIs] has been configured.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes.***

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking ✕ in the upper-right corner of the form.

With this, the discount coupon will be added to the list.

Following the same steps, add as many coupons to the list that you want on the platform.

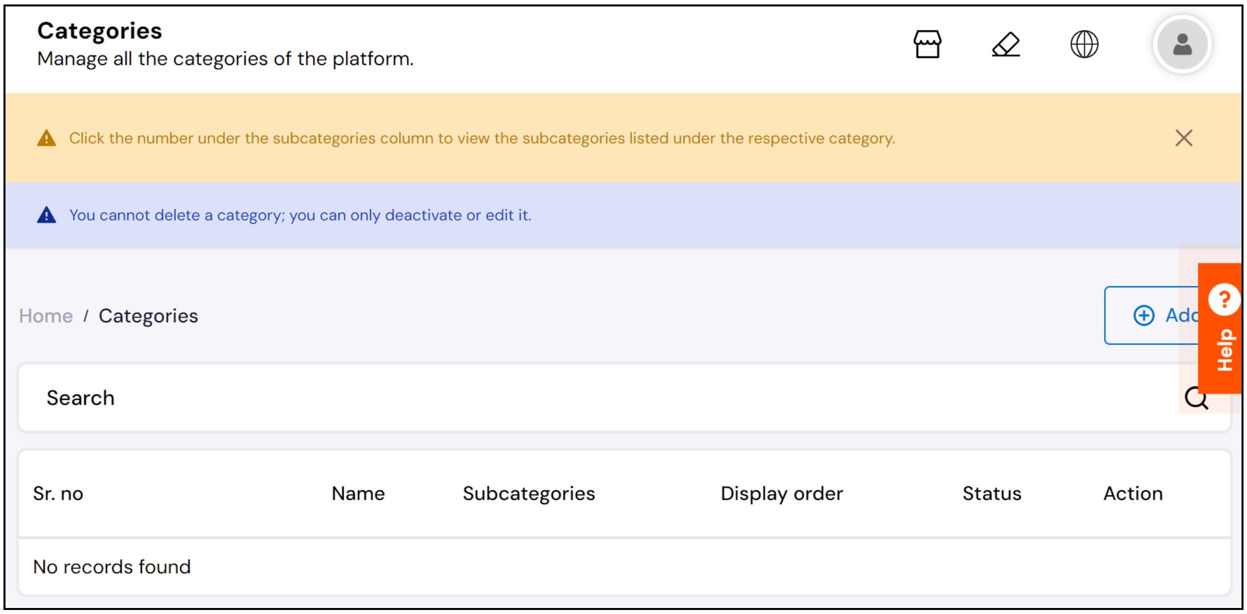
Use the **edit button** beside a coupon to edit its information and the **delete button** beside it to delete the coupon from the system.

*Refer to the **Admin manual** to learn more about all the features under this page.*

15. Create categories & subcategories

The next step involves setting up categories and subcategories to define the type of services freelancers can offer and the type of jobs clients can post on the platform.

To do this, go to **User preferences > Categories**.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Add all the categories and subcategories you want on the platform under this page.

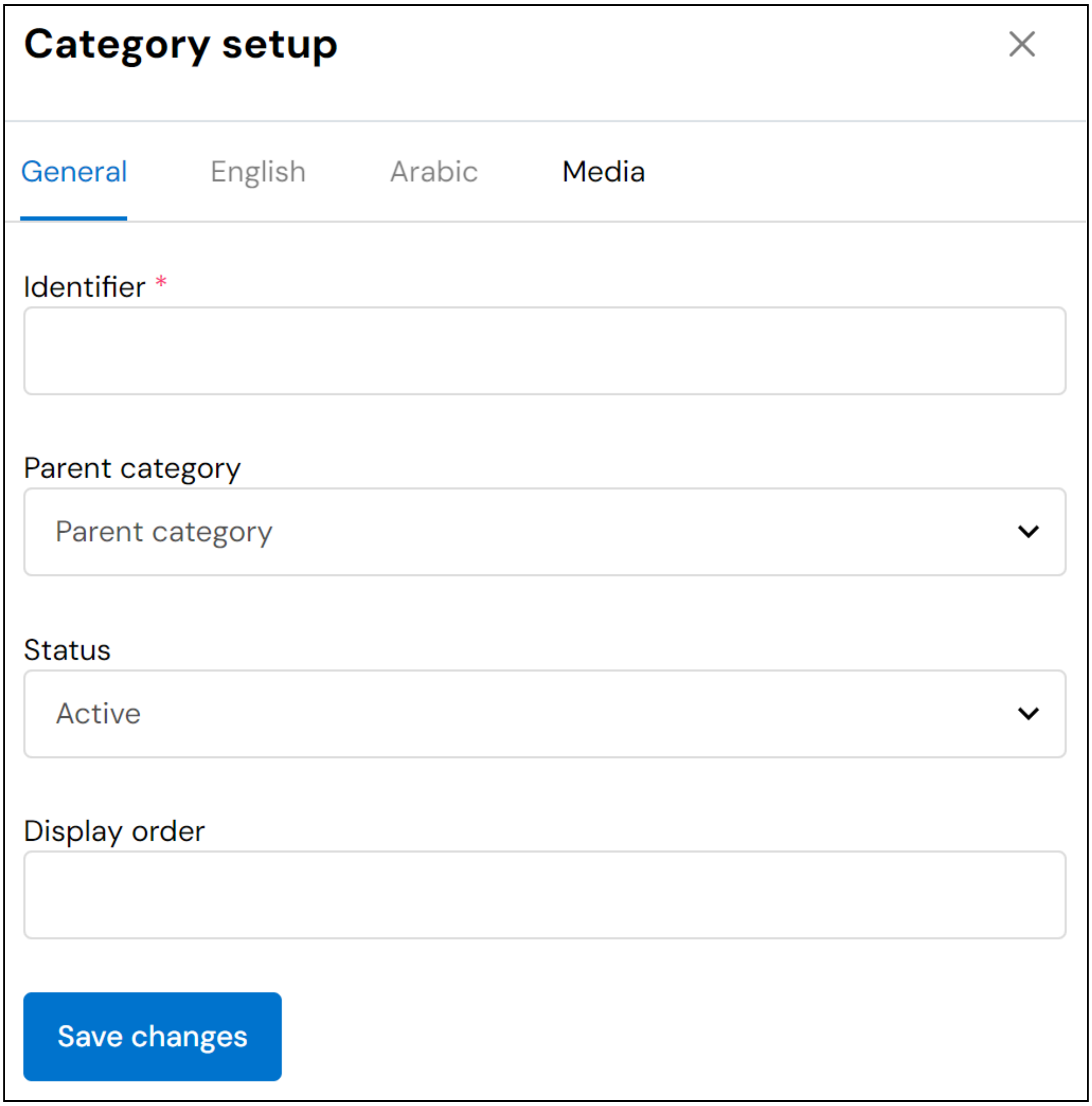
To do this, click **Add** from the upper-right corner of the page to open the **Category setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in. Followed by the secondary language tabs is the media tab.

Let us begin with the General tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



General tab

Update the following:

- **Identifier*:** Enter the category/subcategory identifier.

  It can be the same as the category/subcategory name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Ensure that the identifier is unique and unlike any other category/subcategory identifier, else an error message will appear.

- **Parent category:** Select the category type. To do this, click the field and a dropdown list will appear.

  Select "**root category**" from the list if the category is a parent category or main category. If the category is a subcategory (child category), select the category it will fall under.

- **Status:** Select the status of the category/subcategory.

  To do this, click the field and select "**active**" to mark the category/subcategory as active and publish it on the platform.

  Select "**inactive**" to hide the category/subcategory for the time being, on the platform. With this, freelancers and clients won't be able to select this category/subcategory when updating their profile and posting a job, respectively.

- **Display order:** Enter the order in which this category/subcategory will appear on the platform.

  For instance, if you want it to appear first, enter 1.

Once done, click **Save changes**.

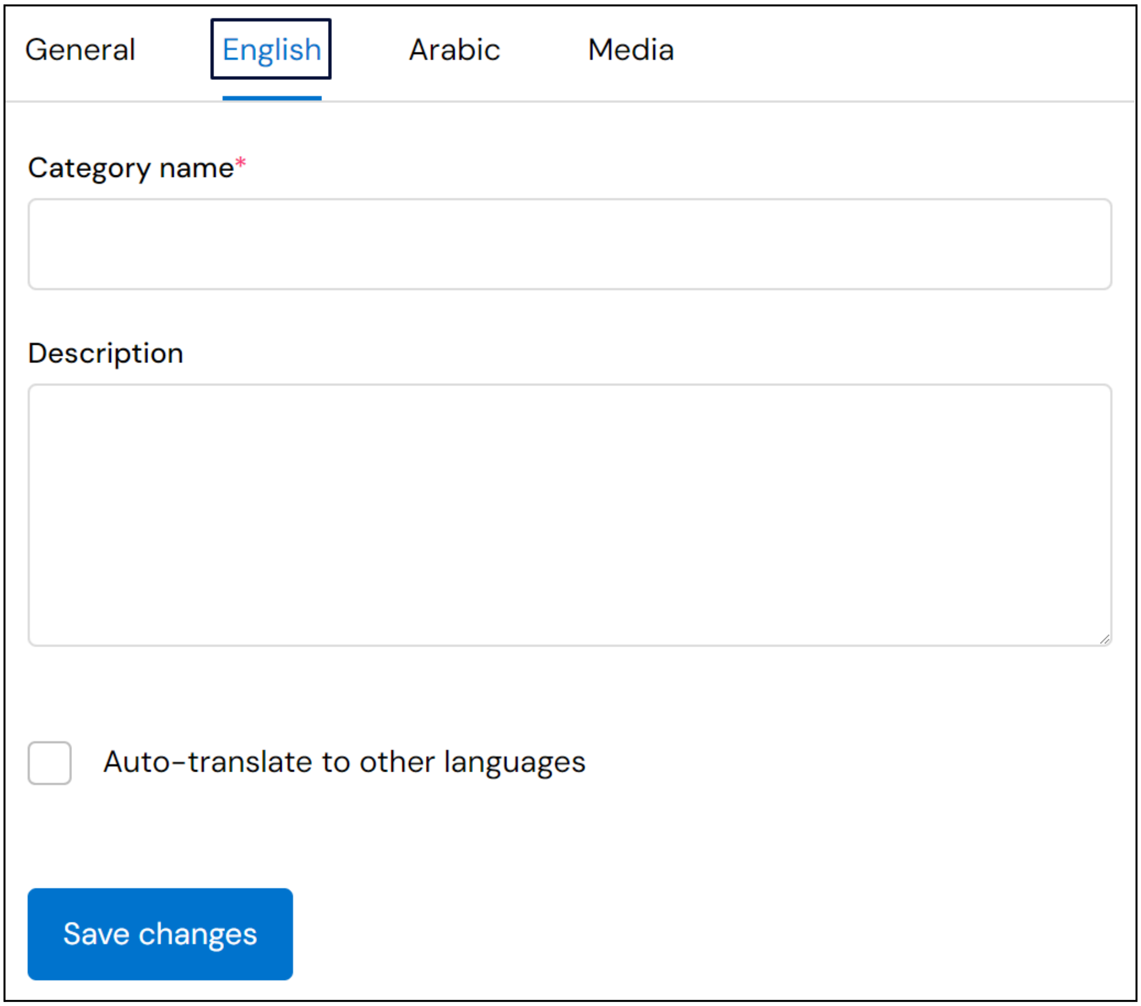
This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the category/subcategory to be published.

Since **English** is set as the default language, this tab is called the English tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Update the following:

- **Category name*:** Enter the name of the category/subcategory in the default language.

  This name will be displayed wherever applicable on the platform.

- **Description:** Enter a description of the category/subcategory. This is not displayed on the platform and is just for you.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form or move to the **Media tab**.*

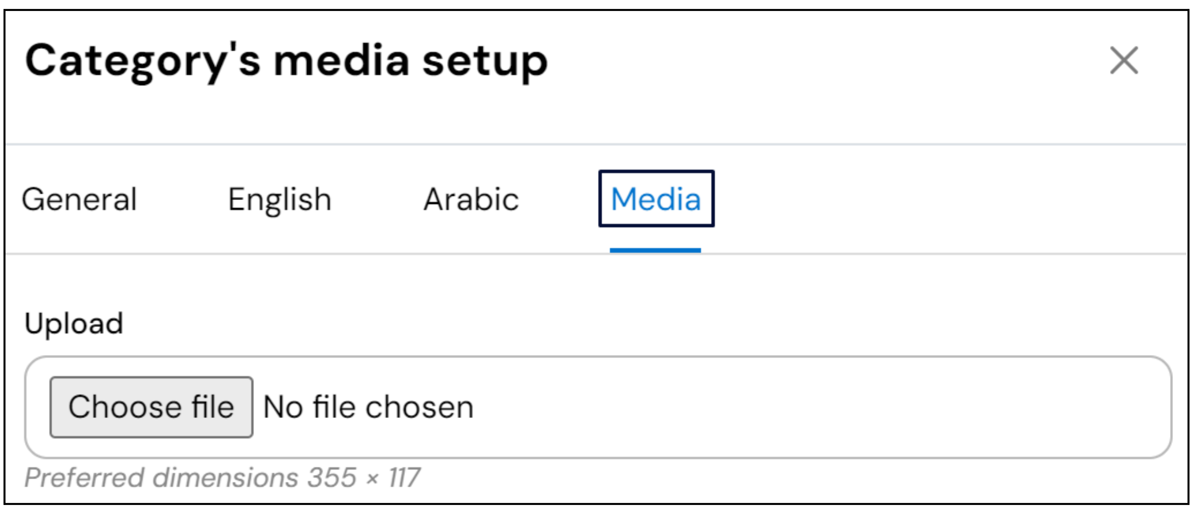
*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form or move to the **Media tab**.*

Media tab

The last tab, after the secondary language tab(s), is the media tab.

Click this tab to visit it.

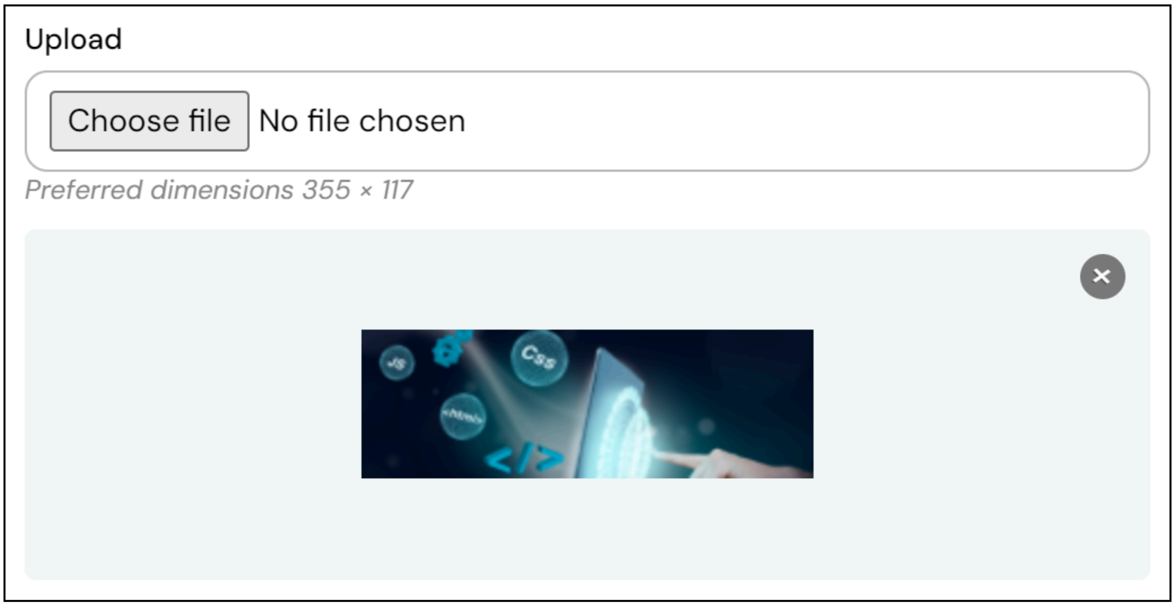
When this tab opens, the name of the form also changes to **Category's media setup**.



To upload or edit the selected image, click **Choose file.**

Select a picture from your system and click **Open**.

The image you upload will be listed below the field.



To delete the image, click located at the upper-right corner inside the image's section that is located below the field.

*When you upload the image, it gets saved automatically in the system. Hence, there is no **Save changes** button under this tab.*

Once done, close the form by clicking in the upper-right corner of the form.

With this, the category/subcategory will be added to the list.

*The image you upload here will also be displayed on the **homepage** under the **Category collections** if you have activated it. You can manage which categories appear in this collection under the **CMS** > **Home page collections**.*

Following the same steps, add as many categories and subcategories to the list that you want on the platform.

Linking skills to the third-level category is mandatory for it to be visible at the frontend when selecting a category.

Ensure you add the only those categories you want since you can only edit a category/subcategory you add. You cannot delete any category from the list.

To edit the category or subcategory created, click the **edit button** beside it, and update the details accordingly.

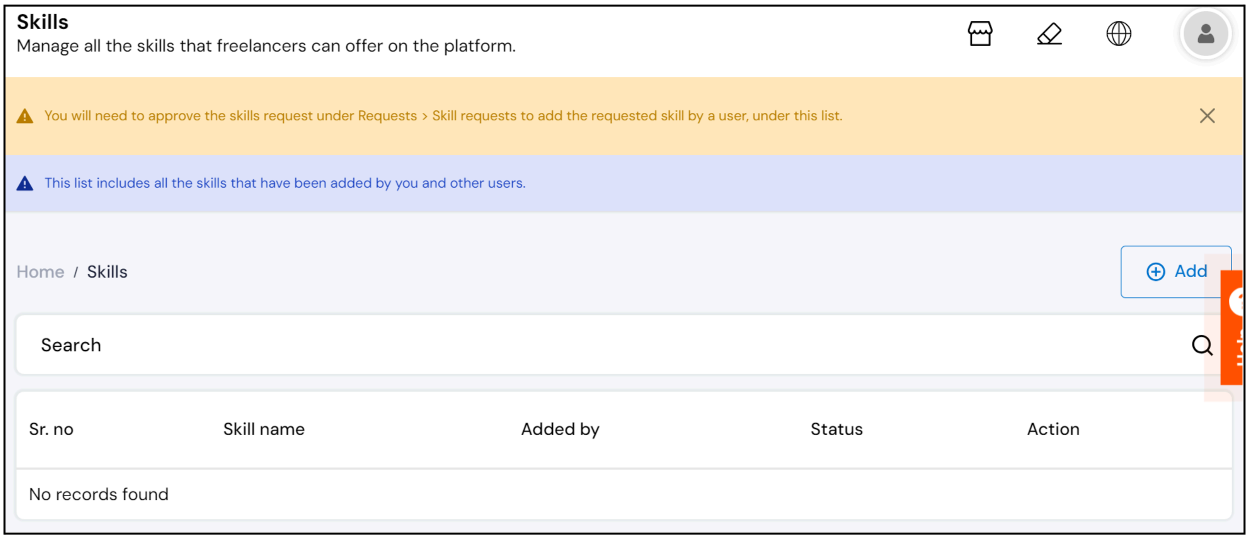
*Refer to the **Admin manual** to learn more about all the features under this page.*

16. Create skills

The next step involves setting up the skills.

Freelancers need to select their skills when creating their profile on the platform. And clients need to select the skills they are looking for when creating a job post.

To create skills, go to **User preferences > Skills**.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by adding all the skills you want on the platform via this submodule.

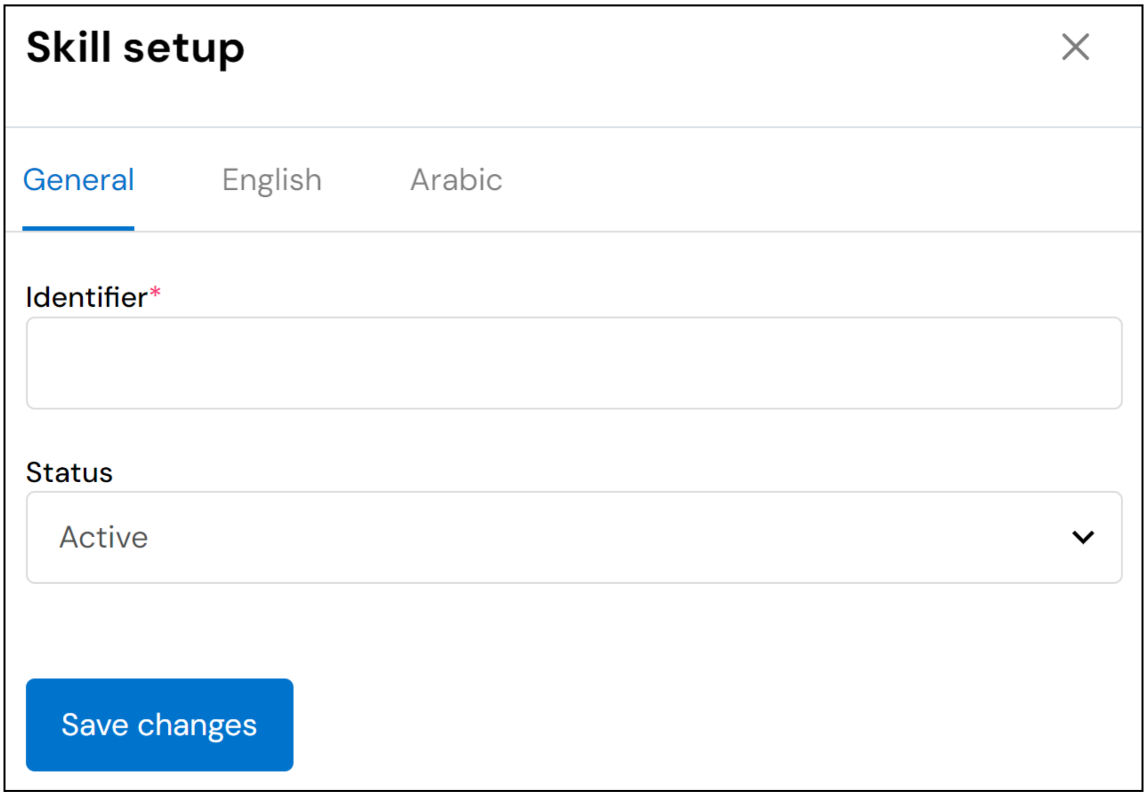
To do this, click **Add** from the upper-right corner of the page to open the **Skill setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



General tab

Update the following:

- **Identifier*:** Enter the skill identifier.

  It can be the same as the skill name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other skill identifier, else an error message will appear.

- **Status:** Select the status of the skill.

  To do this, click the field and select "**active**" to mark the skill as active and publish it on the platform.

  Select "**inactive**" to hide the skill for the time being, on the platform. With this, freelancers and clients won't be able to select this skill when updating their profile and posting a job, respectively.

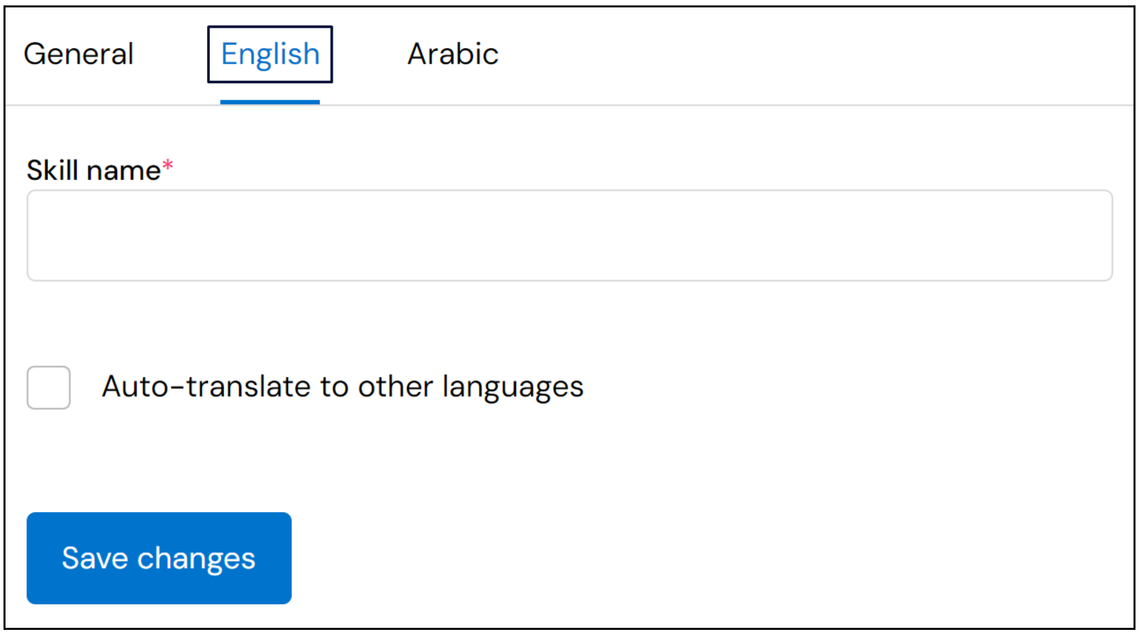
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the skill to be published.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Skill name*:** Enter the name of the skill in the default language.

  This name will be displayed wherever applicable on the platform.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

With this, the skill will be added to the list.

Following the same steps, add as many skills to the list that you want on the platform.

Use the **edit button** beside a skill to edit its information and the **delete button** beside it to delete the skill from the system.

*Refer to the **Admin manual** to learn more about all the features under this page.*

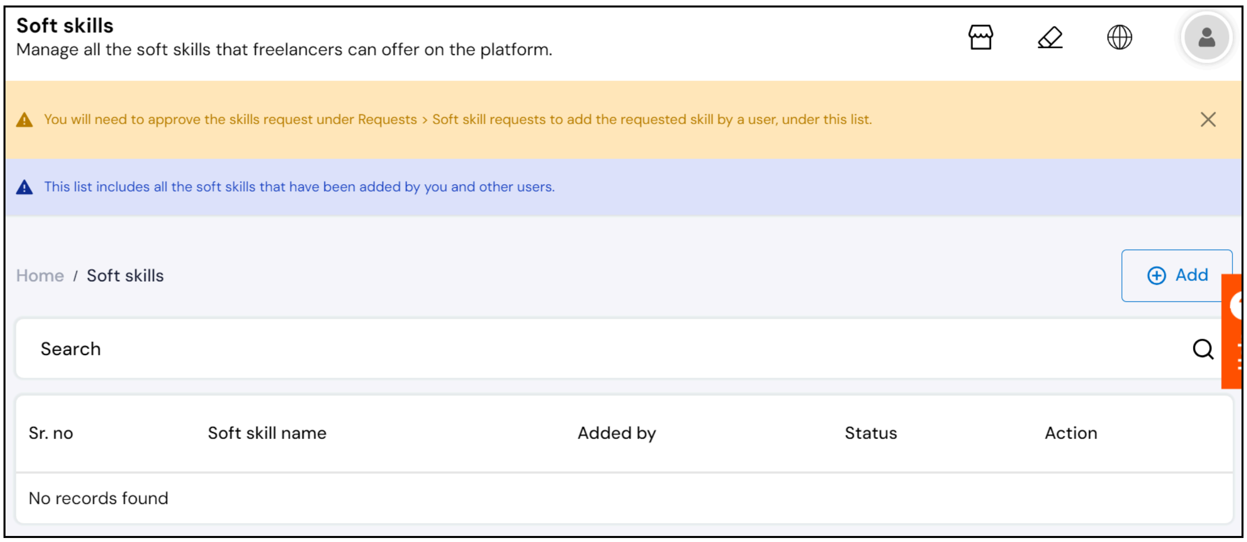
DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

17. Create soft skills

Next, set up the soft skills.

Freelancers need to select their soft skills when creating their profile on the platform. And clients need to select the soft skills they are looking for when creating a job post.

To create soft skills, go to **User preferences > Soft skills.**



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

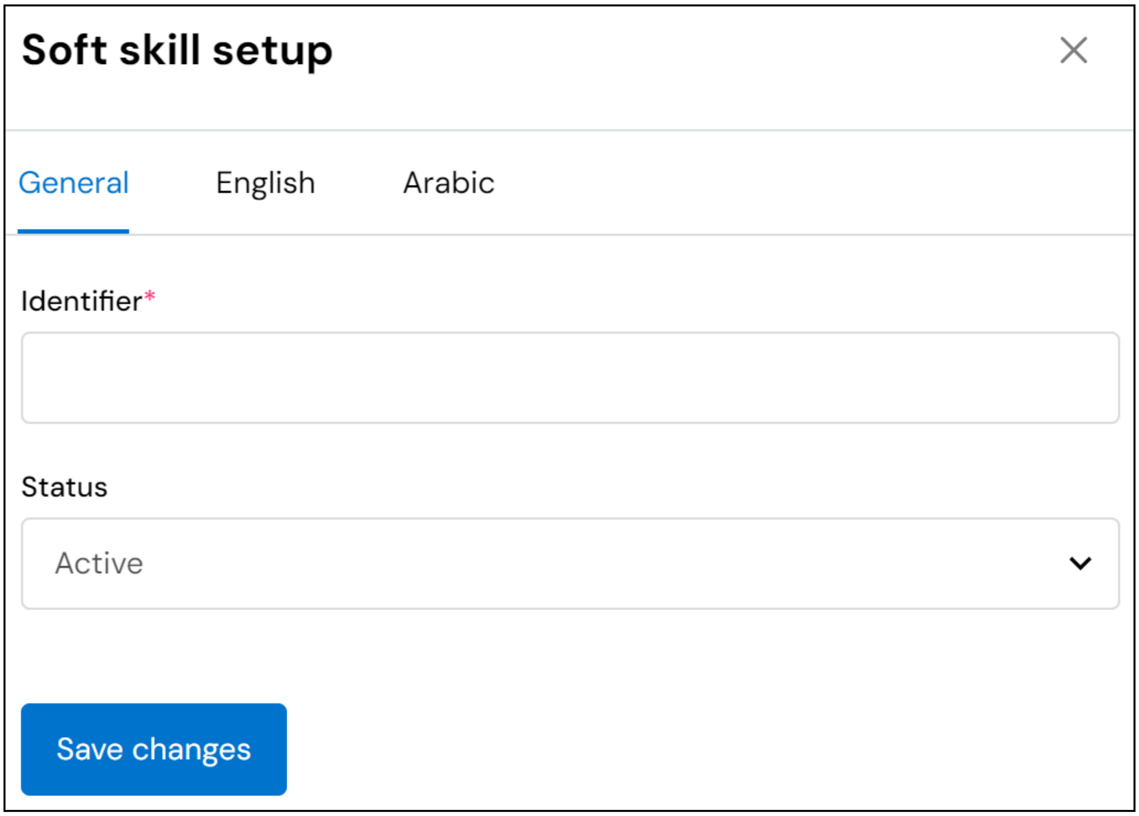
Begin by adding all the soft skills you want on the platform via this submodule.

To do this, click **Add** from the upper-right corner of the page to open the **Soft skill setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



General tab

Update the following:

- **Identifier*:** Enter the soft skill identifier.

  It can be the same as the soft skill name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other soft skill identifier, else an error message will appear.

- **Status:** Select the status of the soft skill.

  To do this, click the field and select "**active**" to mark the soft skill as active and publish it on the platform.

  Select "**inactive**" to hide the soft skill for the time being, on the platform. With this, freelancers and clients won't be able to select this soft skill when updating their profile and posting a job, respectively.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

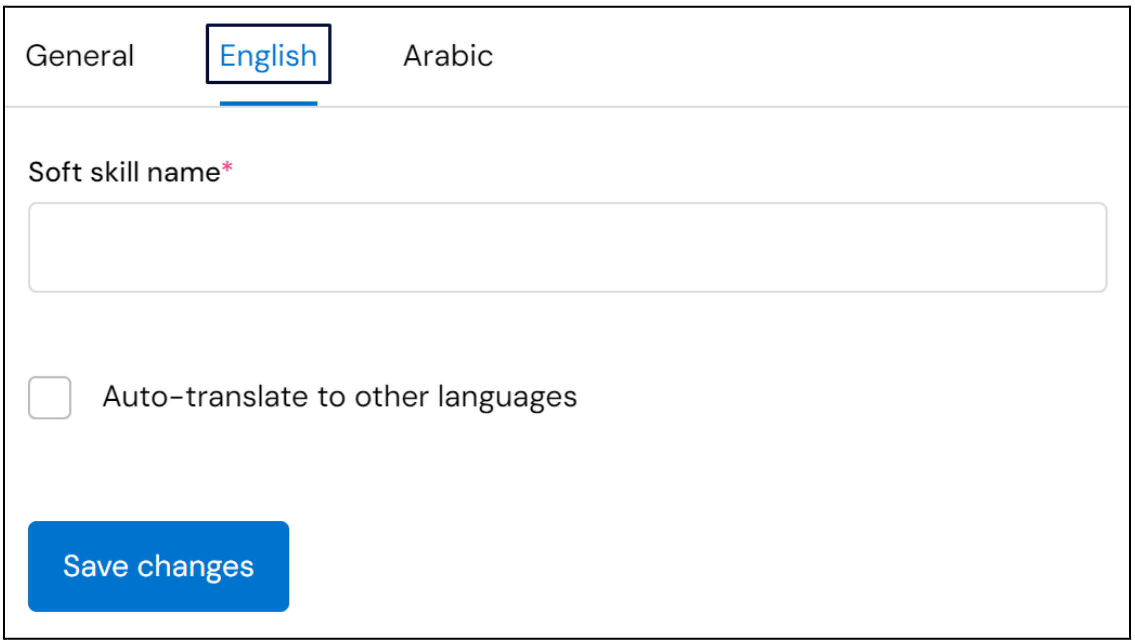
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the soft skill to be published.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Skill name*:** Enter the name of the soft skill in the default language.

  This name will be displayed wherever applicable on the platform.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking ✕ in the upper-right corner of the form.

With this, the soft skill will be added to the list.

Following the same steps, add as many soft skills to the list that you want on the platform.

Use the **edit button** beside a soft skill to edit its information and the **delete button** beside it to delete the soft skill from the system.

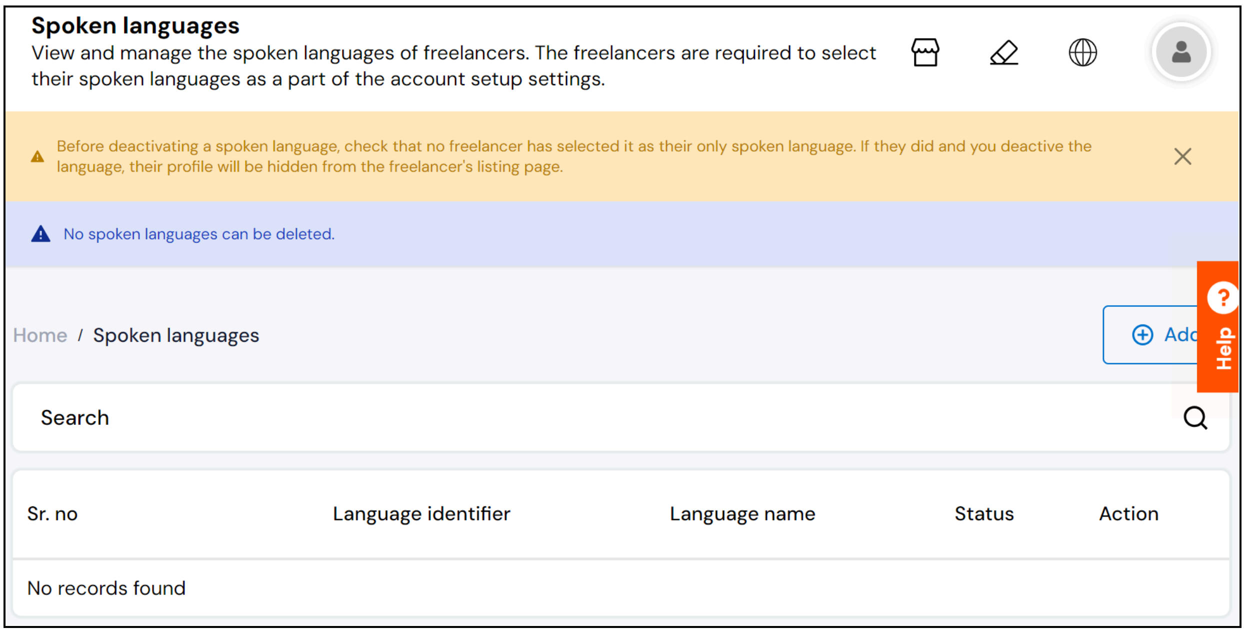
*Refer to the **Admin manual** to learn more about all the features under this page.*

18. Create spoken languages

The next step involves setting up the spoken languages.

Freelancers need to select their spoken language when creating their profile on the platform. And clients need to select the spoken language(s) of the respective freelancer who will be doing the job, when creating a job post.

To create soft skills, go to **User preferences > Spoken languages**.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

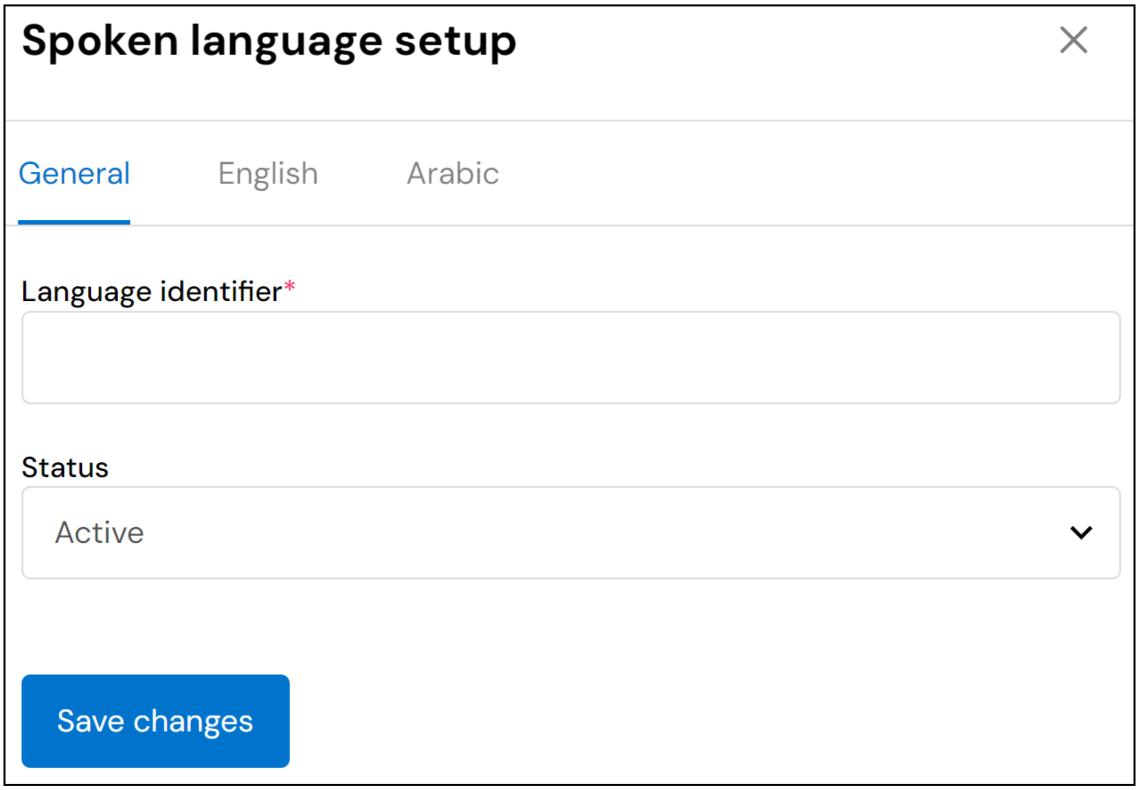
Begin by adding all the spoken languages you want on the platform via this submodule.

To do this, click **Add** from the upper-right corner of the page to open the **Spoken language setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



General tab

Update the following:

- **Language identifier*:** Enter the spoken language identifier.

  It can be the same as the spoken language name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other spoken language identifier, else an error message will appear.

- **Status:** Select the status of the spoken language.

  To do this, click the field and select "**active**" to mark the spoken language as active and publish it on the platform.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Select "**inactive**" to hide the spoken language for the time being, on the platform. With this, freelancers and clients won't be able to select this spoken language when updating their profile and posting a job, respectively.

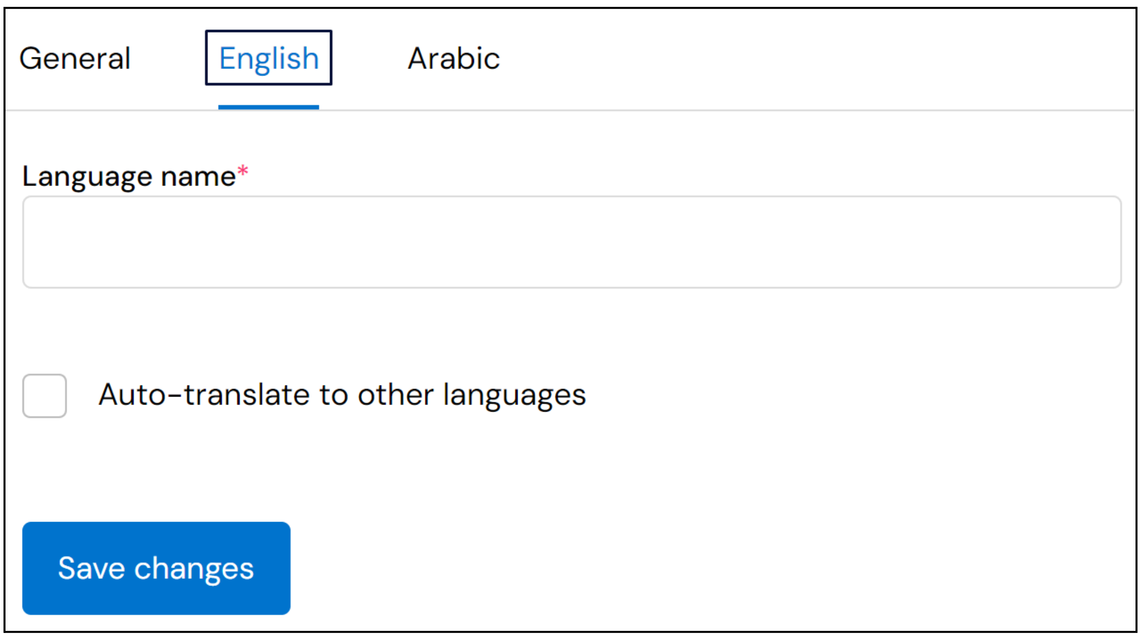
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the spoken language to be published.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Language name*:** Enter the name of the spoken language in the default language.

  This name will be displayed wherever applicable on the platform.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

*This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking X in the upper-right corner of the form.

With this, the spoken language will be added to the list.

Following the same steps, add as many spoken languages to the list that you want on the platform.

Use the **edit button** beside a spoken language to edit its information and the **delete button** beside it to delete the spoken language from the system.

*Refer to the **Admin manual** to learn more about all the features under this page.*

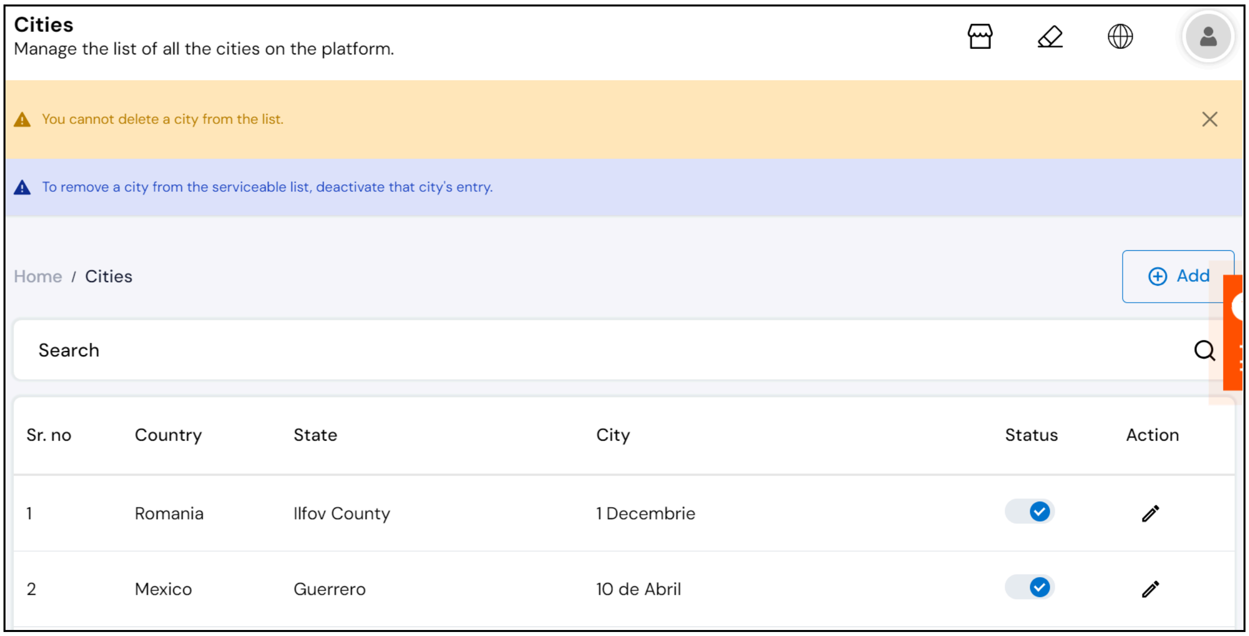
DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

19. Create cities

The next step involves setting up the spoken languages.

Freelancers need to select their city for their address, when creating their profile on the platform. And clients need to select the city when adding an address for an on-site job post.

To create soft skills, go to **User preferences > Cities**.



The list will come prefilled with a list of all the main cities in the world. You can add or edit the cities as per your requirements.

If some cities are missing from the list, use the add feature to add them.

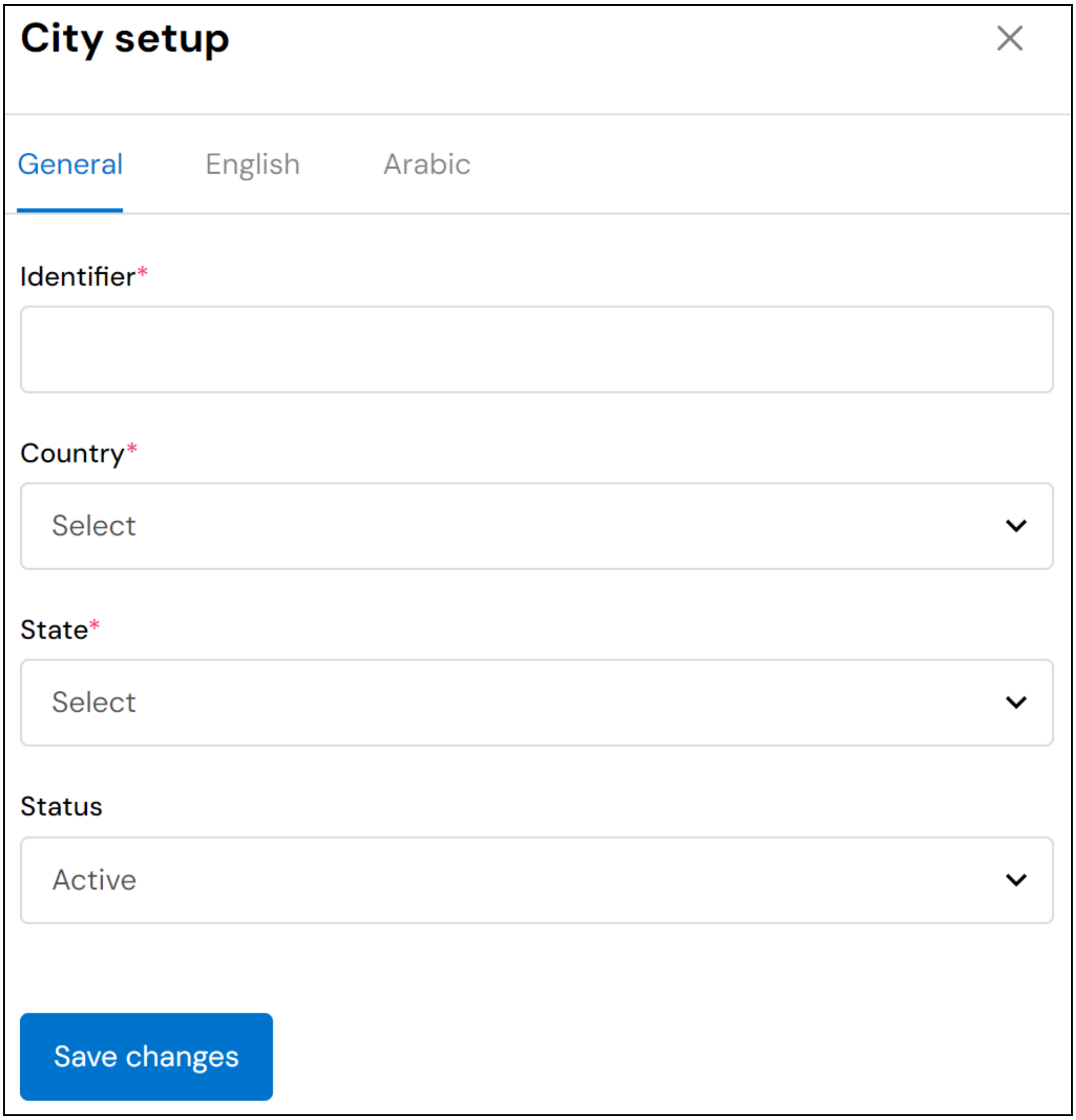
Click **Add** from the upper-right corner of the page to open the **City setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



General tab

Update the following:

- **Identifier*:** Enter the city identifier.

  It can be the same as the city name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

Ensure that the identifier is unique and unlike any other city identifier, else an error message will appear.

- **Country*:** Select the country under which this city falls.

  To do this, click the field and dropdown list appears with all the active countries on the platform.

  *Manage all the list of countries under **User preferences > Countries**.*

- **State*:** Select the state under which this city falls.

  To do this, click the field and dropdown list appears with all the active states of active countries on the platform.

  *Manage all the list of states under **User preferences > States**.*

- **Status:** Select the status of the city.

  To do this, click the field and select "**active**" to mark the city as active and publish it on the platform.

  Select "**inactive**" to hide the city for the time being, on the platform. With this, freelancers and clients won't be able to select this city when adding their address.

Once done, click **Save changes**.

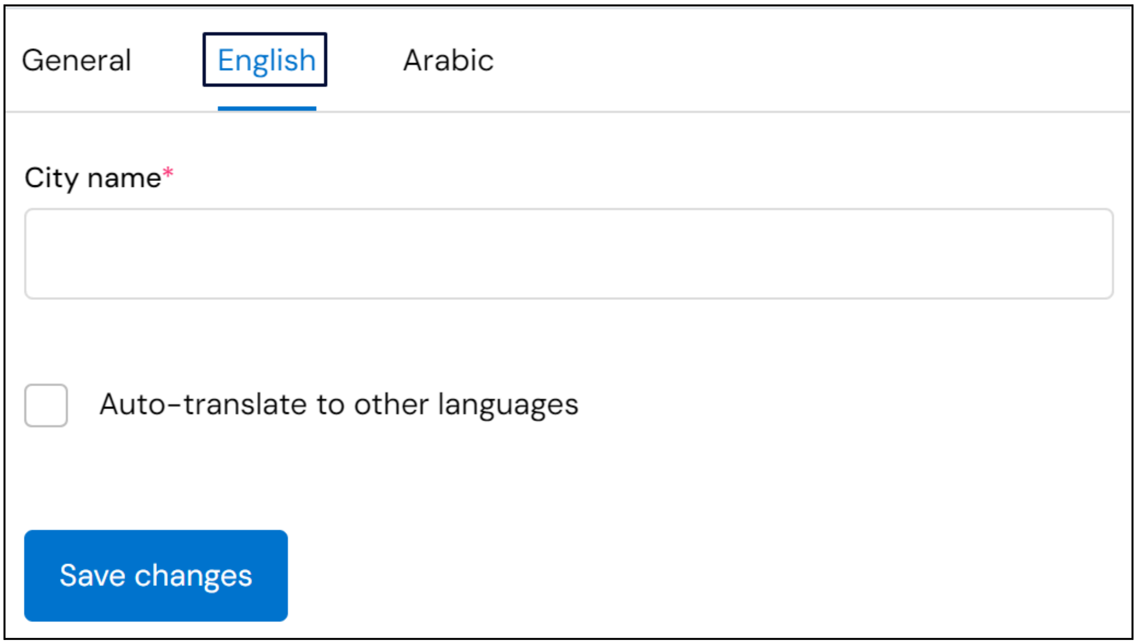
This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the city to be published.

Since **English** is set as the default language, this tab is called the English tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Update the following:

- **City name*:** Enter the name of the city in the default language.

  This name will be displayed wherever applicable on the platform.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

i *The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.*

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking X in the upper-right corner of the form.

With this, the city will be added to the list.

To edit a city, click the **edit button** beside it, and update the details accordingly.

*Refer to the **Admin manual** to learn more about all the features under this page.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

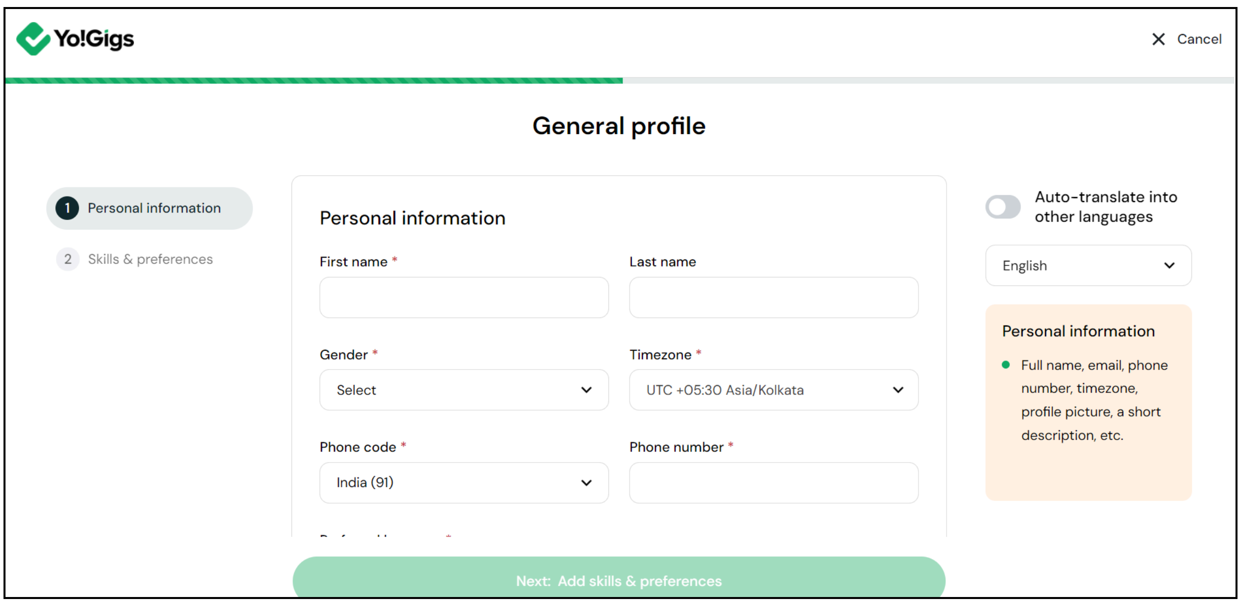
20. Set up the Freelancer registration dynamic tabs, sections & fields.

The next step involves setting up the dynamic tabs, sections, and fields of the freelancer registration form.

When a user decides to join the platform as a freelancer, they are required to first register as a user on the platform via the Sign up page.

Once they do this, they are directed to the freelancer registration form.

By default, the system has two tabs under the freelancer registration form that allows you to collect the basic details of the freelancer including their address, profile picture, a short bio, their skills and preferences.



However, you can choose to collect more information from the freelancer including document proofs, education background, work experience, CV, etc.

This can be done via the **Freelancer** module, which allows you to set up the dynamic tabs, sections and fields of the form to collect additional information from the freelancer.

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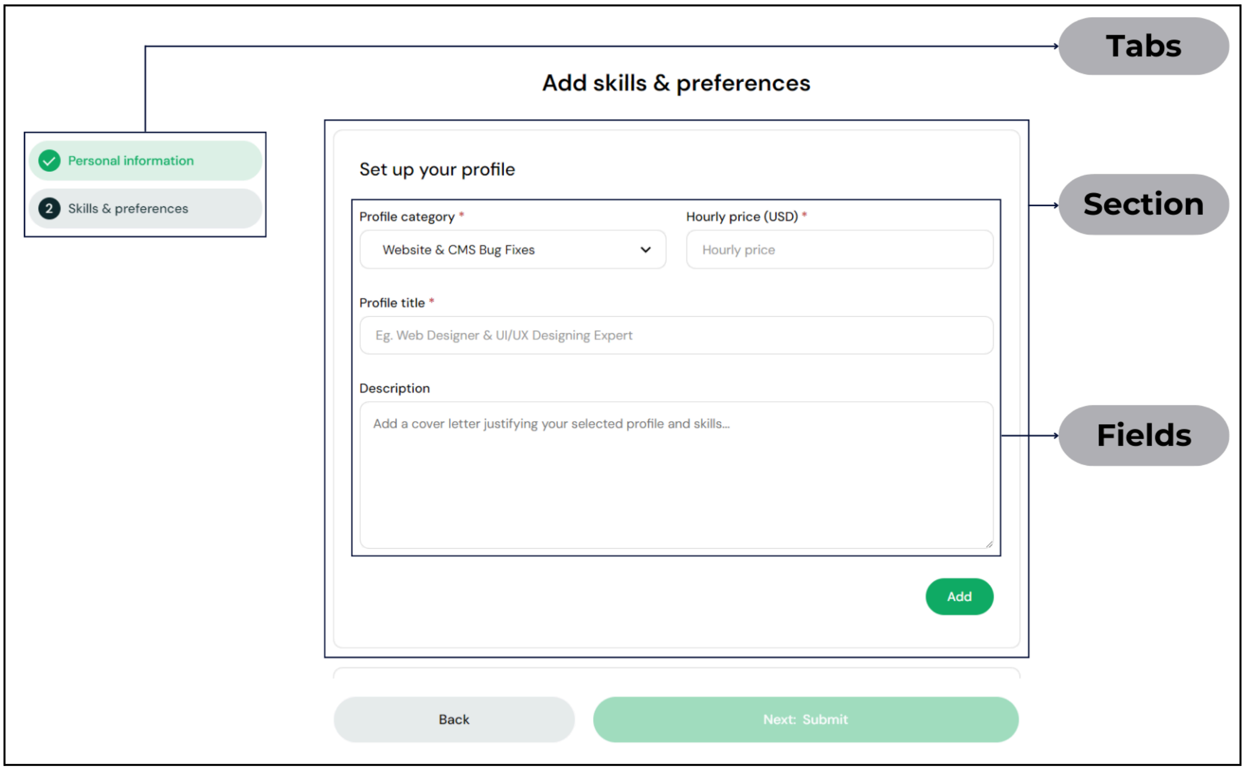
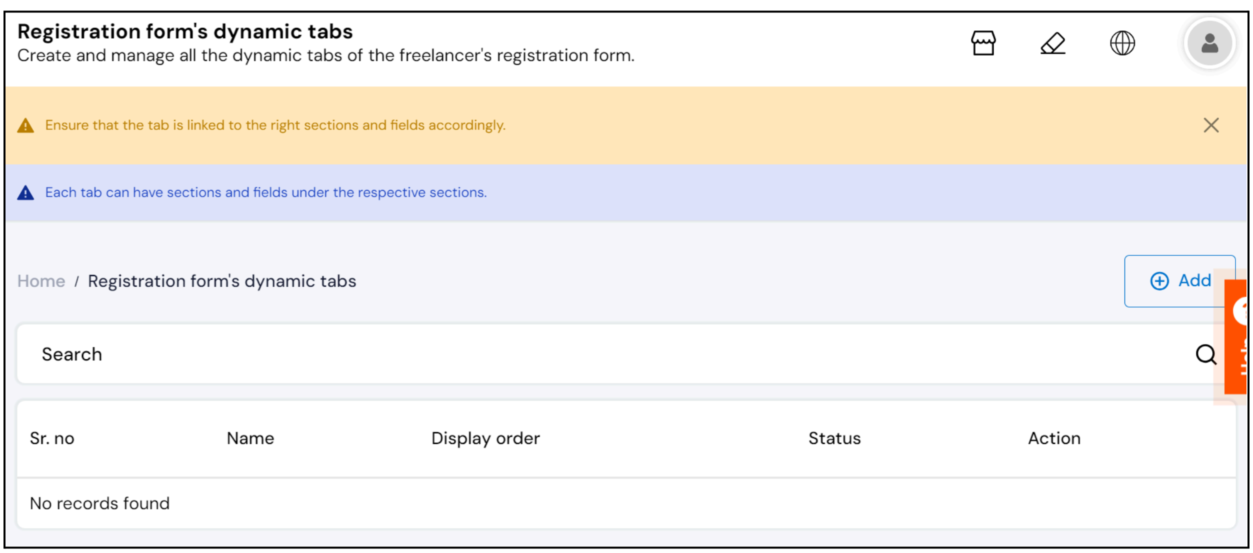
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



To do this, follow the steps below:

Step 1: Create the dynamic tabs.

To do this, go to **Freelancer > Registration form's dynamic tabs.**



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

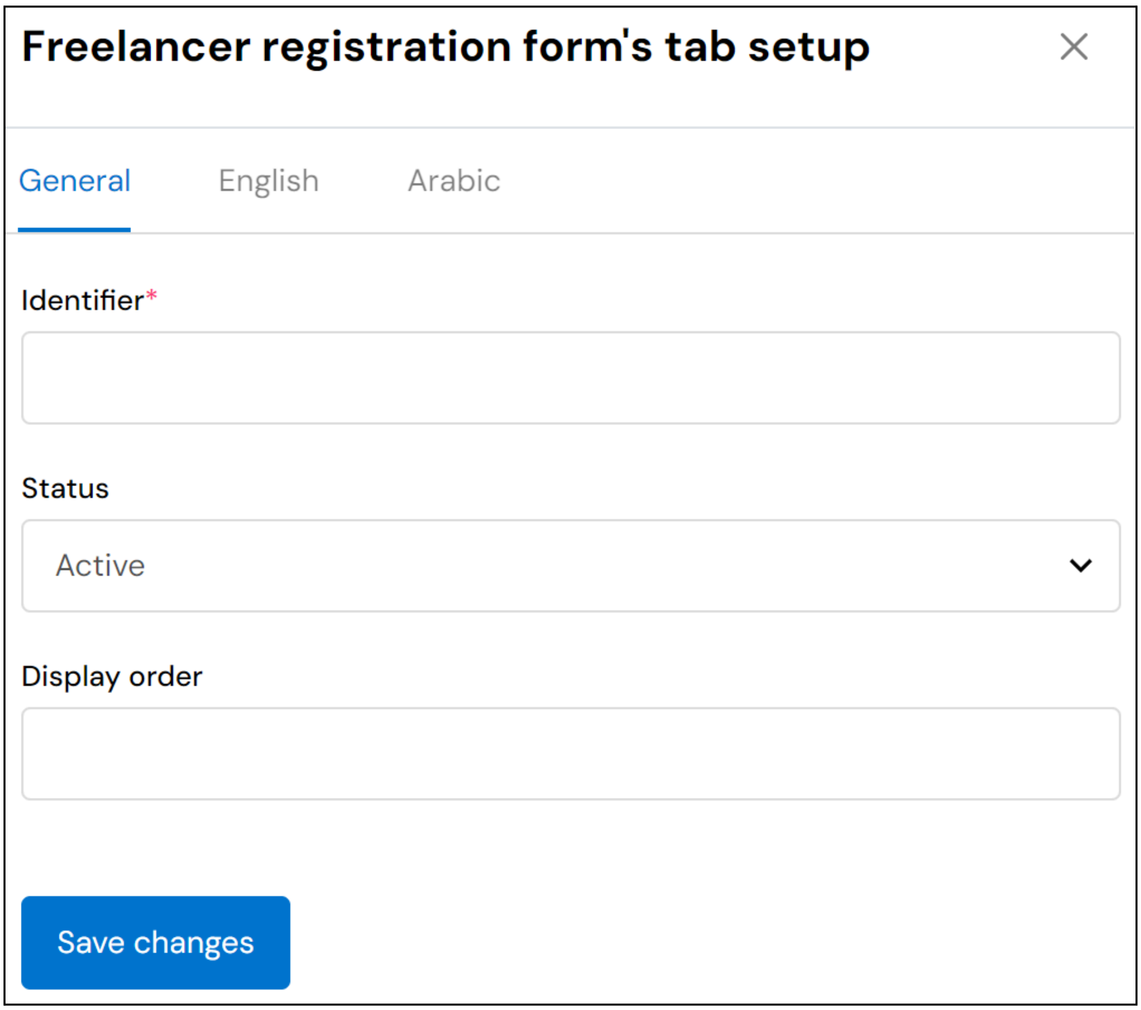
Begin by adding the tabs you want in the freelancer registration form.

To do this, click **Add** from the upper-right corner of the page to open the **Freelancer registration form's tab setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



General tab

Update the following:

- **Identifier*:** Enter the tab identifier.

  It can be the same as the tab name or title, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other tab identifier, else an error message will appear.

- **Status:** Select the status of the tab.

  To do this, click the field and select "**active**" to mark the tab as active and publish it on the platform.

  Select "**inactive**" to hide the tab for the time being, on the platform. When you deactivate a tab, all the sections and fields under the respective tab will be hidden (deactivated) from the platform too.

- **Display order:** Enter the order in which this tab will appear under the freelancer registration form (after the default tabs of the form).

  For instance, if you want it to appear first, enter 1.

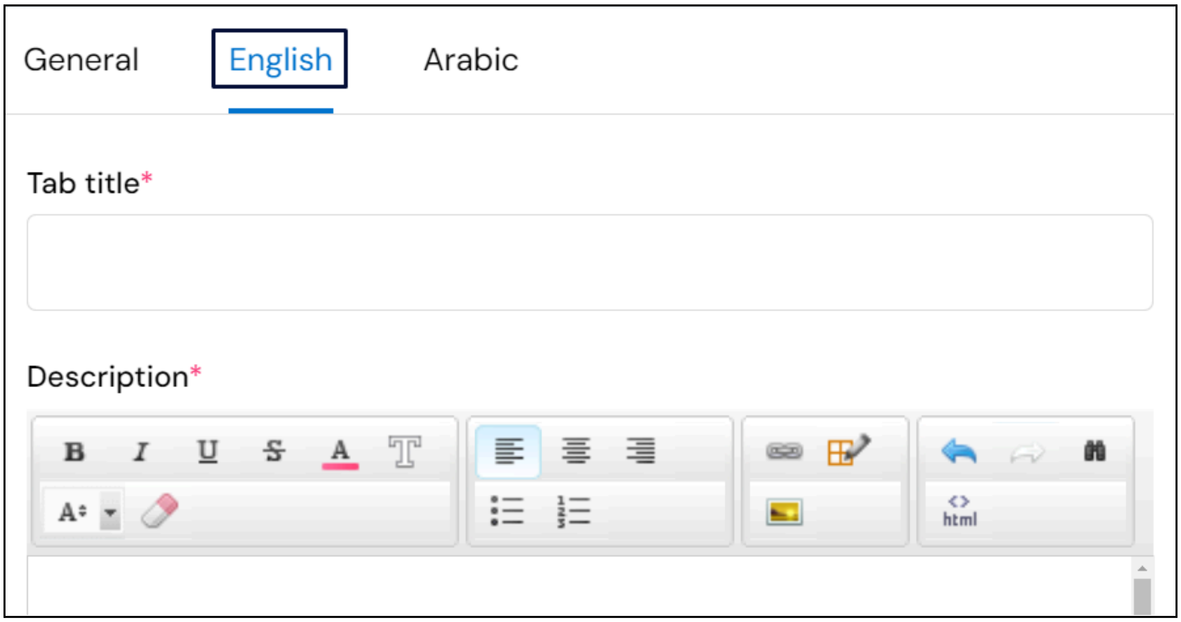
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab.

Since **English** is set as the default language, this tab is called the English tab.



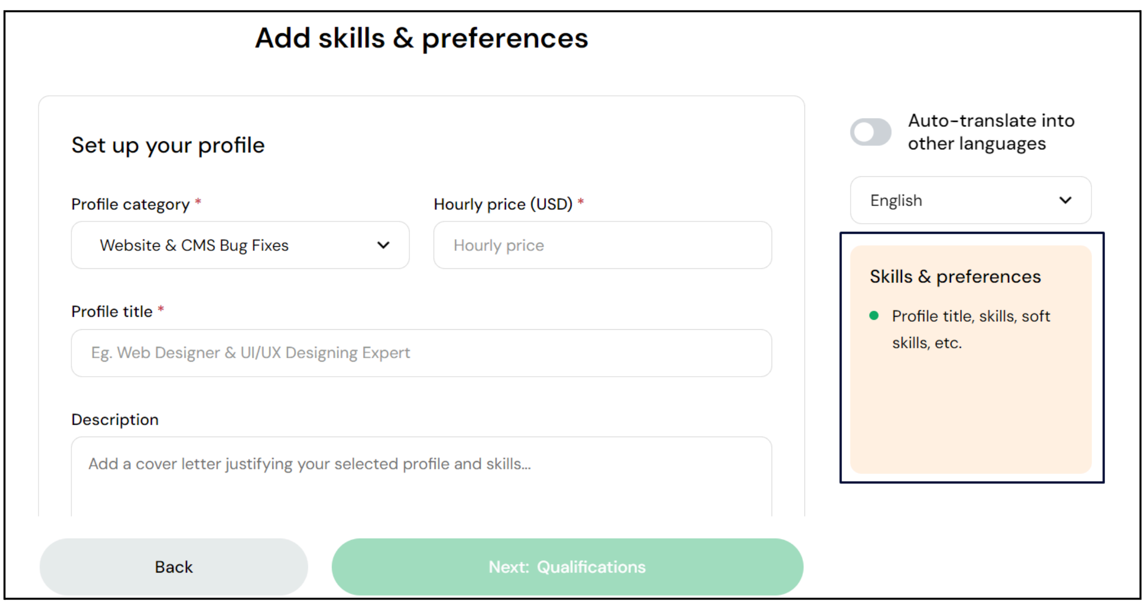
Update the following:

- **Tab title*:** Enter the title of the tab in the default language.

  This name will be displayed on the form.

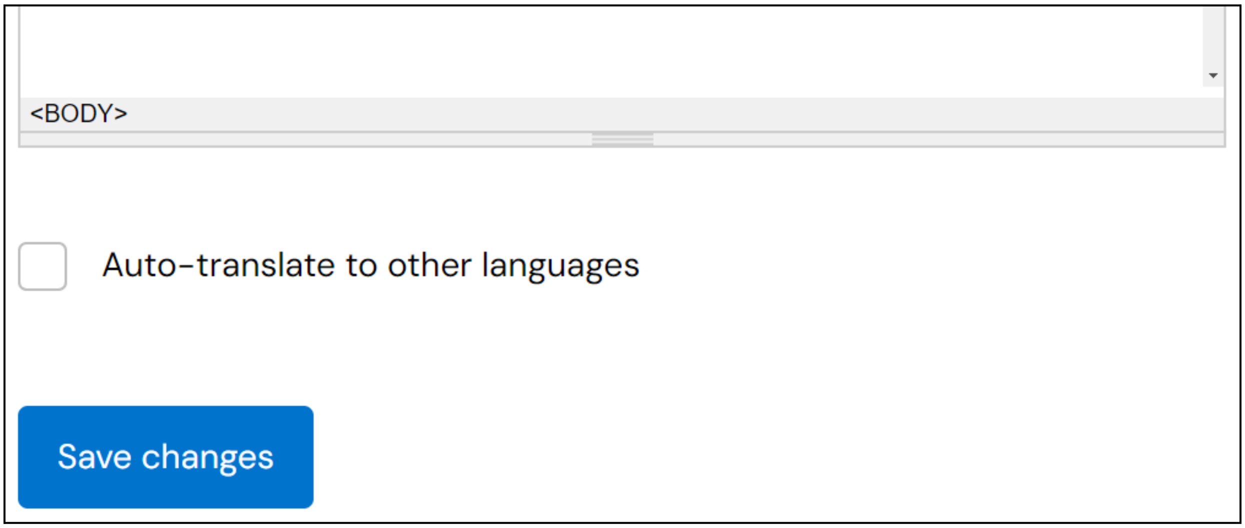
- **Description*:** Edit/enter the description of the tab, and format it according to your taste using the content editor.

  This content is displayed on the right side of the page under the **tab name**.



Scroll down to update the last setting:

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking X in the upper-right corner of the form.

With this, the tab will be added under the freelancer registration form's dynamic tabs list.

Following the same steps, add as many tabs to the list that you want on the platform.

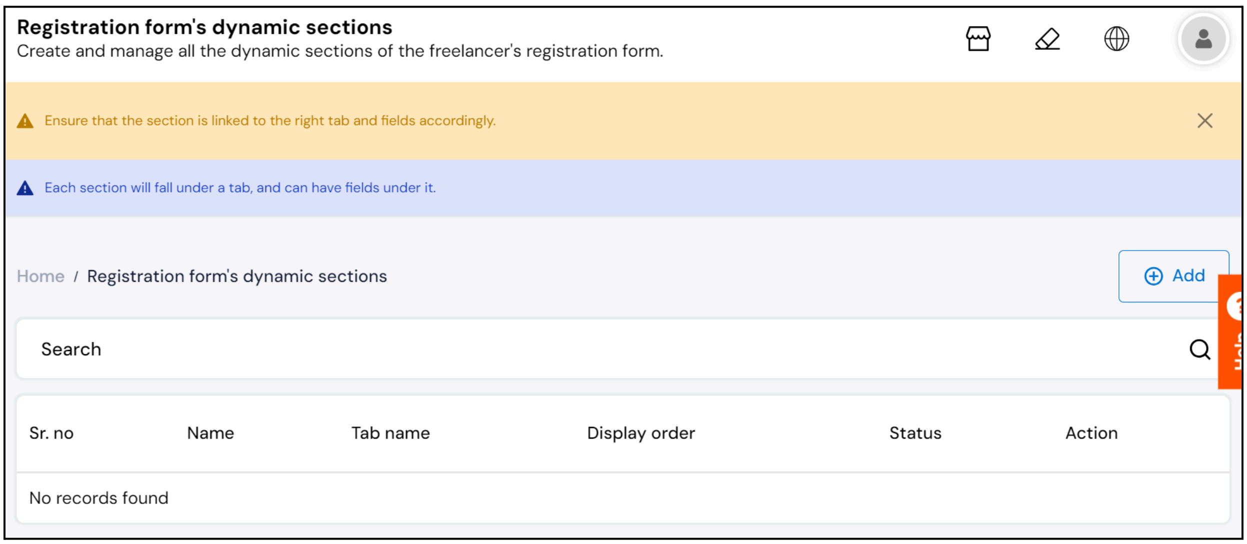
Ensure you add the only those tabs you want since you can only edit a tab you add. You *cannot delete any tab from the list.*

To edit a tab, click the **edit button** beside it, and update the details accordingly.

*Refer to the **Admin manual** to learn more about all the features under this page.*

Step 2: Create the dynamic sections.

To do this, go to **Freelancer > Registration form's dynamic sections.**



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

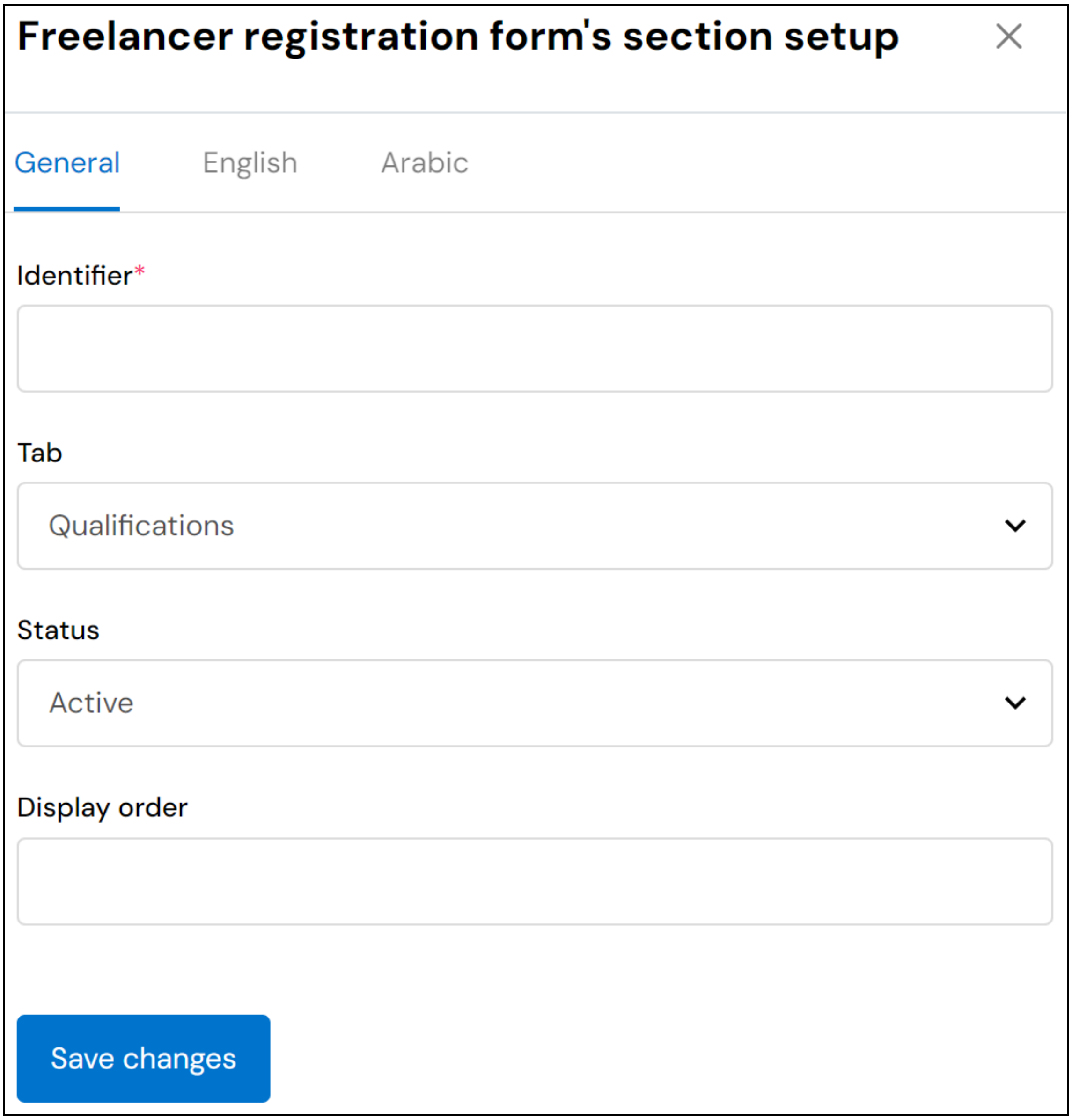
Begin by adding the sections you want in the freelancer registration form.

To do this, click **Add** from the upper-right corner of the page to open the **Freelancer registration form's section setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



General tab

Update the following:

- **Identifier*:** Enter the section identifier.

  It can be the same as the section name or title, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

Ensure that the identifier is unique and unlike any other section identifier, else an error message will appear.

- **Tab:** Select the tab under which this section will fall.

  To do this, click the field and a dropdown list of all the active tabs on the platform will appear.

  *Manage the list of dynamic tabs under **Freelancer > Registration form's dynamic tabs.***

- **Status:** Select the status of the section.

  To do this, click the field and select "**active**" to mark the section as active and publish it on the platform.

  Select "**inactive**" to hide the section for the time being, on the platform. When you deactivate a section, all the fields under it will be hidden (deactivated) from the platform too.

- **Display order:** Enter the order in which this section will appear under the selected tab of the freelancer registration form.

  For instance, if you want it to appear first, enter 1.

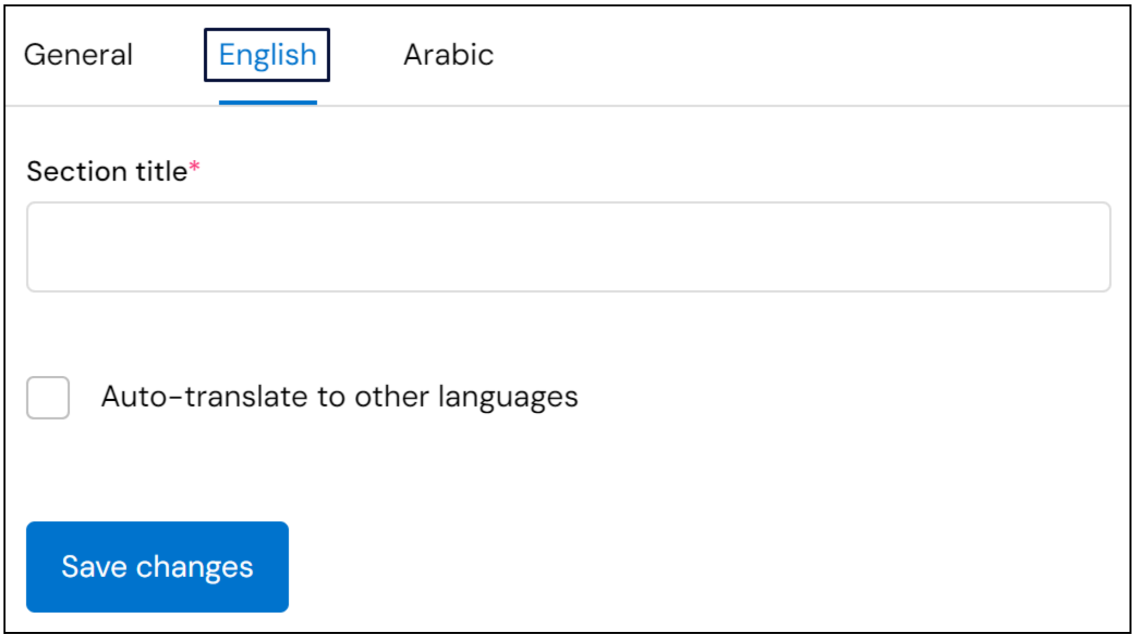
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Section title*:** Enter the title of the section in the default language.

  This name will be displayed on the form.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

With this, the section will be added under the freelancer registration form's dynamic sections list.

Following the same steps, add as many sections (for all the dynamic tabs created) to the list that you want on the platform.

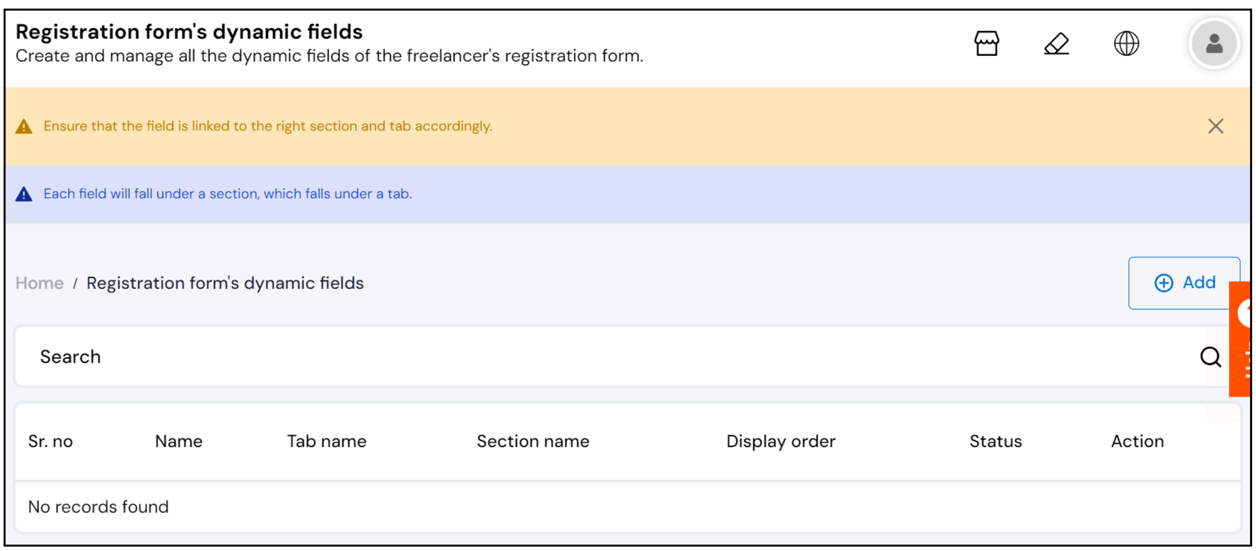
Ensure you add only those sections you want since you can only edit a section you add. You cannot delete any section from the list.

To edit a section, click the **edit button** beside it, and update the details accordingly.

*Refer to the **Admin manual** to learn more about all the features under this page.*

Step 3: Create the dynamic fields.

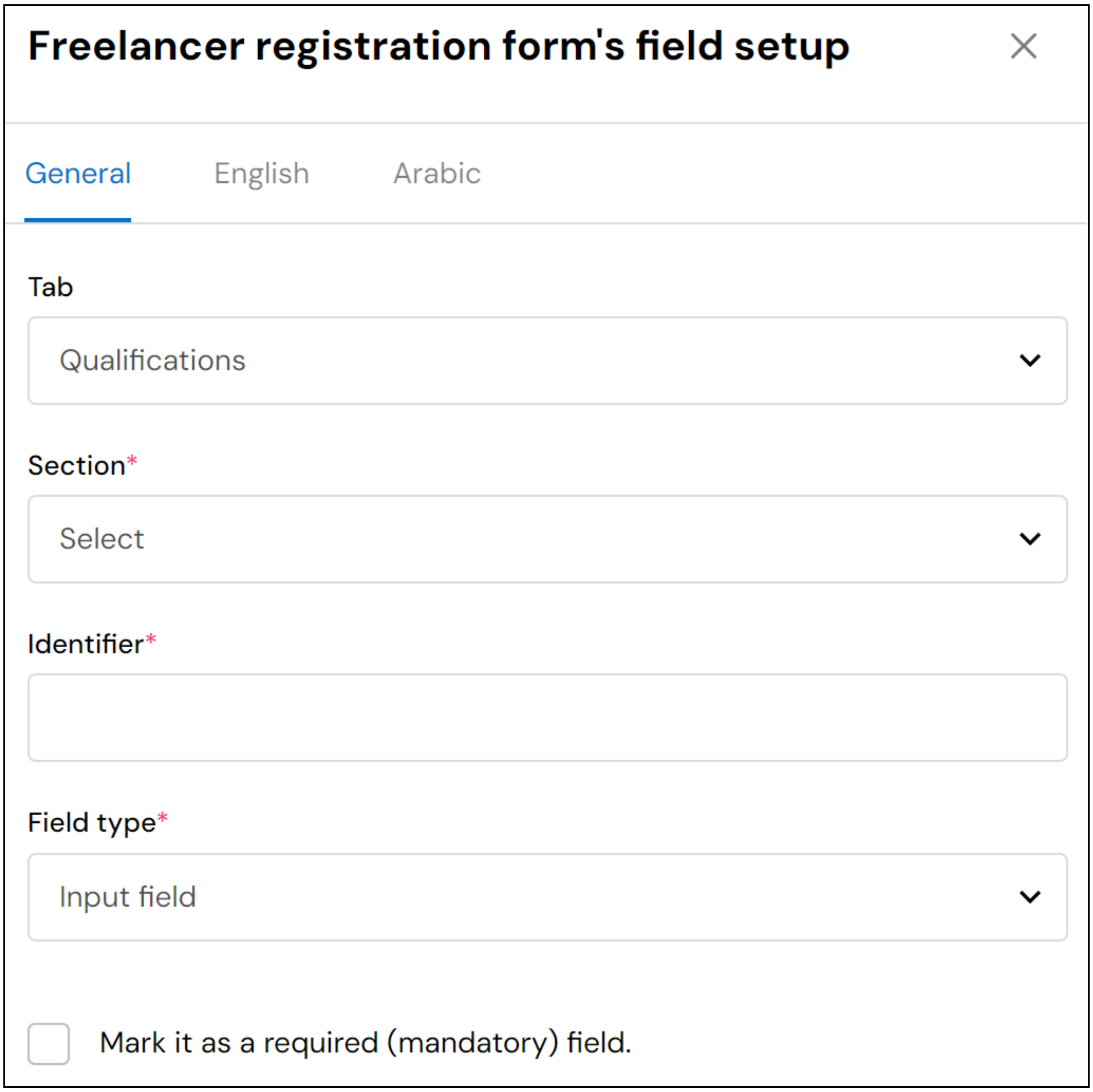
To do this, go to **Freelancer > Registration form's dynamic fields**.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by adding the fields you want in the freelancer registration form.

Click **Add** from the upper-right corner of the page to open the **Freelancer registration form's field setup** form.



There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

General tab

Update the following:

- **Tab:** Select the tab under which this field will fall.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To do this, click the field and a dropdown list of all the active tabs on the platform will appear.

> *Manage the list of dynamic tabs under **Freelancer > Registration form's dynamic tabs.***

- **Section*:** Select the section under which this field will fall.

  To do this, click the field and a dropdown list of all the active sections for the selected tab in the previous field will appear.

> *Manage the list of dynamic tabs under **Freelancer > Registration form's dynamic sections.***

- **Identifier*:** Enter the field identifier.

  It can be the same as the field name or title, which will be defined under the language data tab.

> *An identifier is used to save the data in the system and will not be displayed anywhere on the platform.*
>
> *Ensure that the identifier is unique and unlike any other field identifier, else an error message will appear.*

- **Field type:** Select the type of field.

  To do this, click the field to select the following options from the dropdown list that appears:

  - Input field
  - Text area field
  - Dropdown list field
  - Checkbox field
  - Radio options field
  - Date field
  - Upload document field
  - Email field

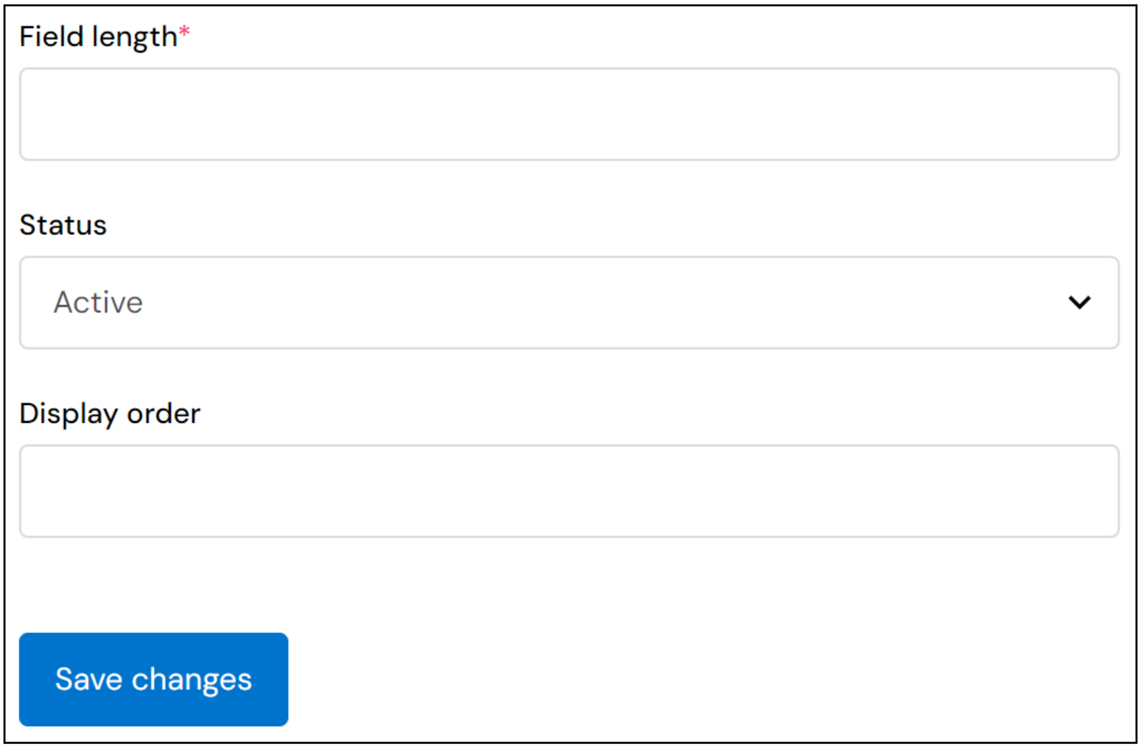
  Make your selection based on the information type you are trying to collect via this field.

- **Mark it as a required (mandatory) field:** Check mark this to make this field a mandatory field.

  The user will not be able to save the details and move to the next tab without filling out the mandatory field.

Leave the checkbox unselected or deselect it if you do not want to mark this field as a mandatory field. In this case, freelancers can skip this field.

Scroll down to update the rest of the fields under this form:



Additional (and different) fields will appear for each field type selected.

Each situation has been explored:

i. Input field

The following field will appear. Edit it accordingly:

- **Field length:** Enter the characters length of the input field. It will restrict the user from entering more characters than those set.

ii. Text area field; Email field

No additional field will appear for these two field types.

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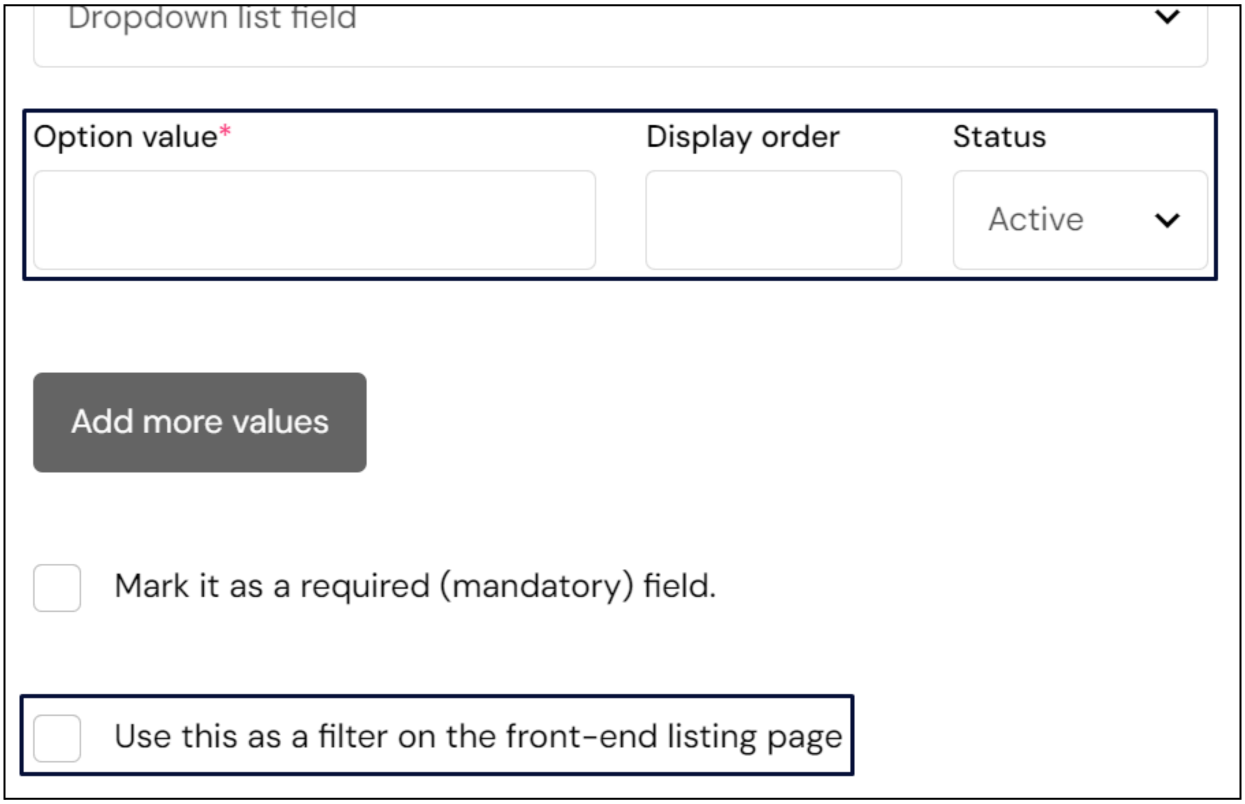
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

iii. Dropdown list field; Checkbox field, Radio options field

The following fields will appear if you select any of these three options:



Use the option value, display order and status fields to create the values (options) that will be displayed in the dropdown list/radio button options/checkbox options.

- **Option value*:** Enter the option name or value.

  For instance, if the dropdown list/radio button option/checkbox option is a list of different education levels, and the first option is 'Primary education.'

- **Display order:** Enter the order in which this option will appear under this field type.

  For instance, if you want it to appear first, enter 1.

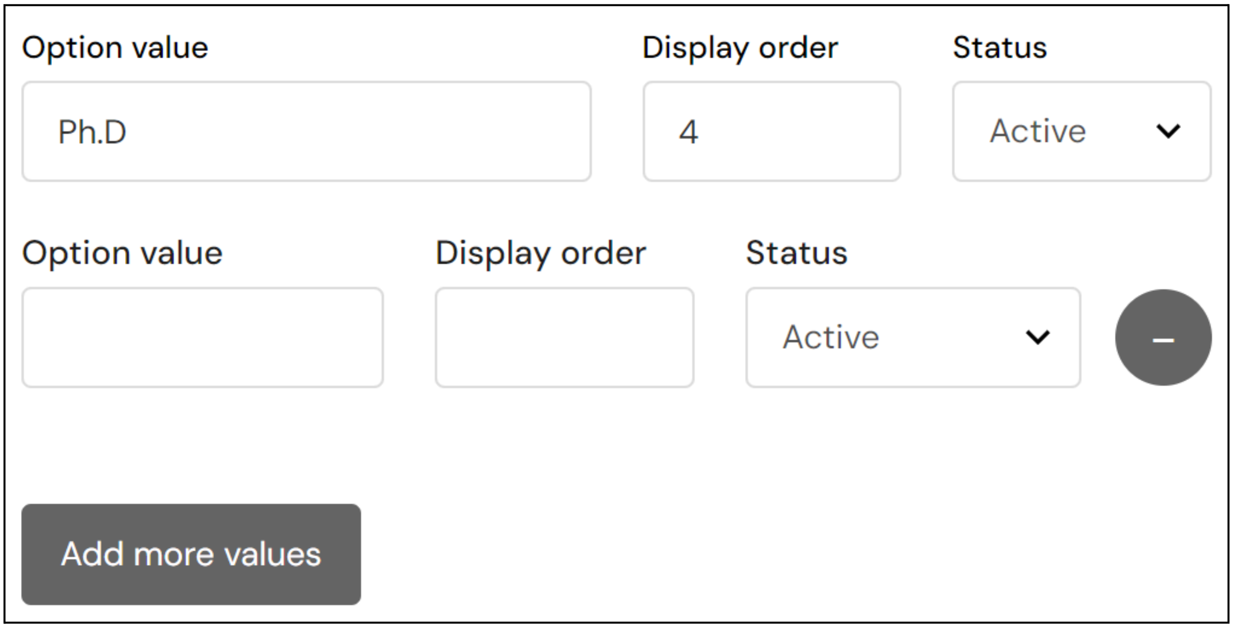
- **Status:** Select the status of the option.

  To do this, click the field and select "**active**" to mark the option as active to display it in this field type on the freelancer form.

  Select "**inactive**" to hide the option in this field type on the freelancer form. In this case, this option will not be visible and cannot be selected by any freelancer.

With this, one option value is created.

To add another option value, click **Add more values** and a new set of fields will appear. Add as many reasonable numbers of options as required for the field type following this process.



If you clicked the **Add more values** button by mistake, click beside the new fields to remove them.

Once all the options have been added, move to the next field:

- **Use this as a filter on the front-end listing page:** Check mark this to use the options created for this field as a filter for the freelancer listing page at the front end.

  Clients will be able to narrow down their search by using these filters and get exactly what they are looking for.

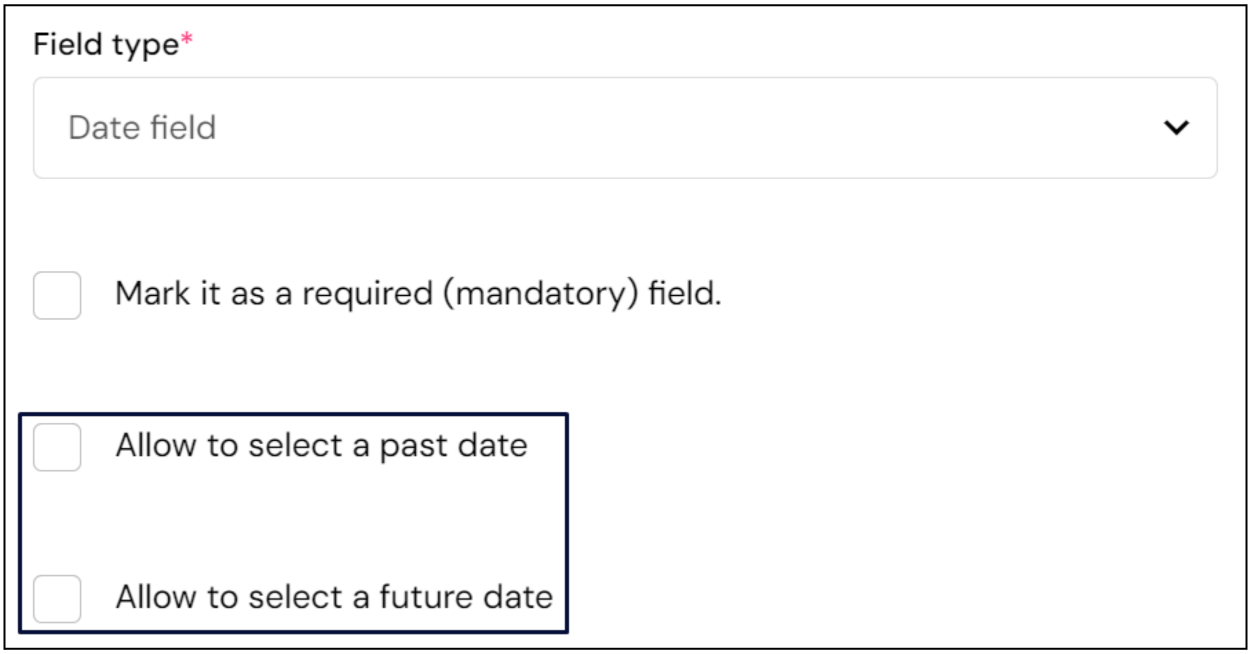
  Leave the checkbox unselected or deselect it if you do not want to use this as a field for the freelancer listing page.

  *There is a limit that can be set for the number of dynamic filters you can create using this feature. Manage this setting under **Settings > System configurations > Common settings tab.***

  If the number of dynamic filters limit reaches, this field will still be visible; however, an error will appear when you select it.

iv. Date field

The following fields will appear. Edit them accordingly:



- **Allow to select a past date:** Check mark this to allow the freelancer to select a date that falls before the current date (an older date).

  Leave the checkbox unselected or deselect it if you do not want to allow the freelancer to select an old date.

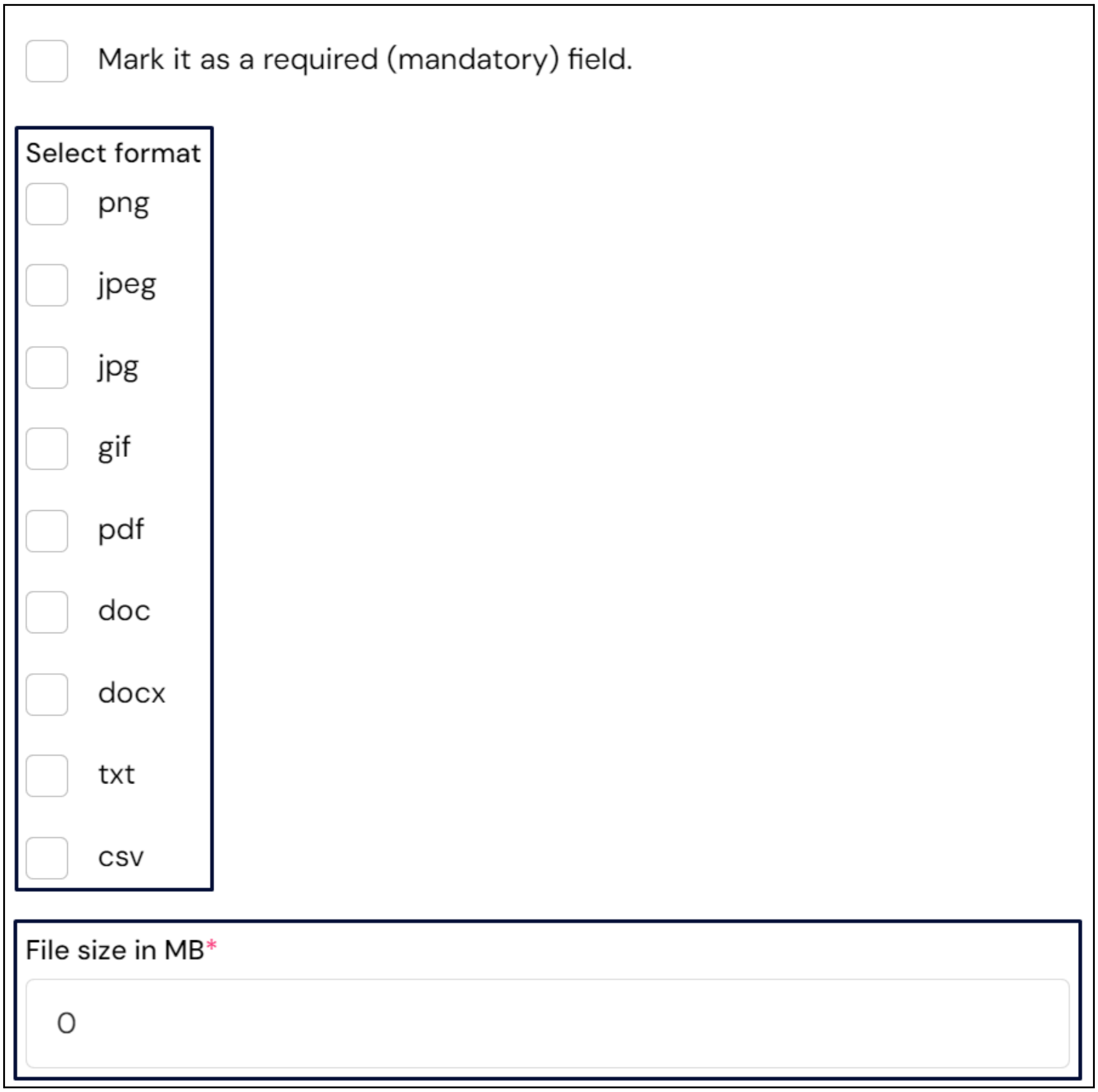
- **Allow to select a future date:** Check mark this to allow the freelancer to select a date that falls after the current date (a future date).

  Leave the checkbox unselected or deselect it if you do not want to allow the freelancer to select a future date.

v. Upload document field

The following fields will appear. Edit them accordingly:

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



- **Select format:** Check mark the document formats you can accept from the user. The user will only be able to upload documents that are of the selected format.

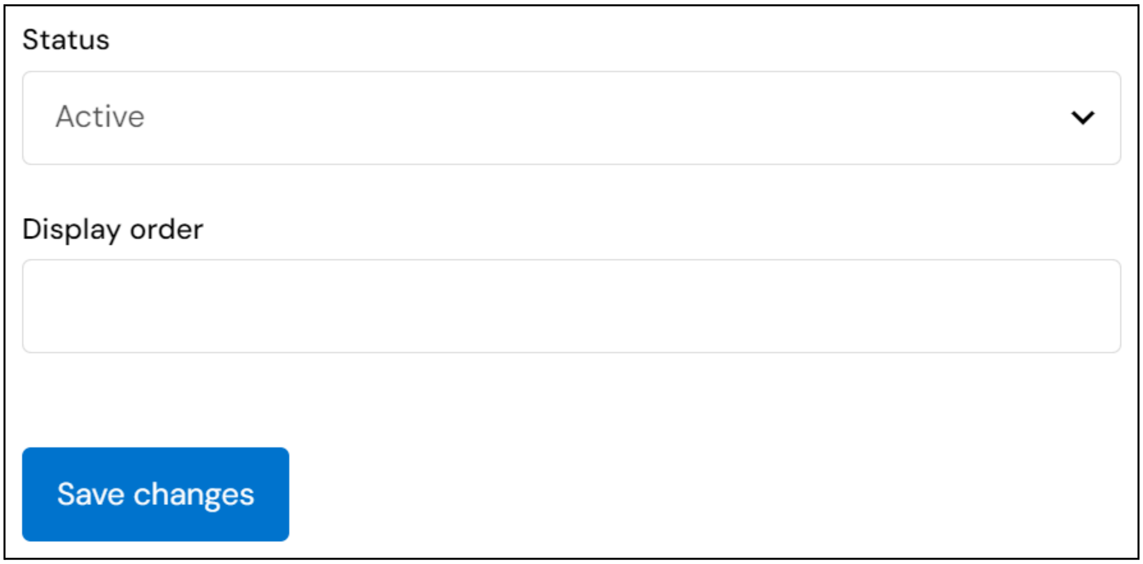
  Leave those checkboxes unselected or deselect those formats that you do not accept for the document.

  If you do not select even one format, users won't be able to upload any document. So, kindly ensure you select at least one format from the list.

- **File size in MB*:** Enter the maximum size the document can be of, in megabytes.

  For instance, if the maximum file size you want is 2 MB, enter 2 in this field. And the freelancers won't be able to upload any file whose size is larger than 2 MB.

Once you have updated the field type and its related field details, move to on to fill the last fields of the form:



- **Status:** Select the status of the field.

  To do this, click the field and select "**active**" to mark the field as active and publish it on the platform.

  Select "**inactive**" to hide the field for the time being, on the platform. When you deactivate a section, all the fields under it will be hidden (deactivated) from the platform too.

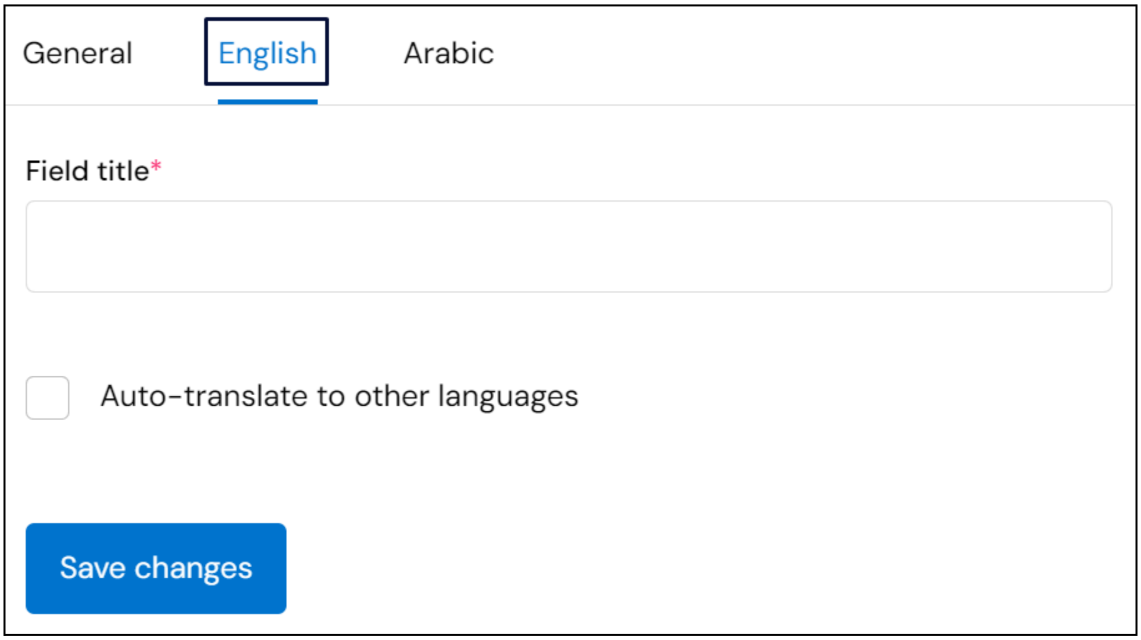
- **Display order:** Enter the order in which this field will appear under the selected section of the freelancer registration form.

  For instance, if you want it to appear first, enter 1.

Once done, click **Save changes**. This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab. Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Field title*:** Enter the title of the field in the default language. This name will be displayed on the form.
- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

With this, the field will be added under the freelancer registration form's dynamic fields list.

Following the same steps, add as many fields (for all the dynamic sections created) to the list that you want on the platform.

Ensure you add only those fields you want since you can only edit a field you add. You cannot delete any field from the list.

To edit a field, click the **edit button** beside it, and update the details accordingly.

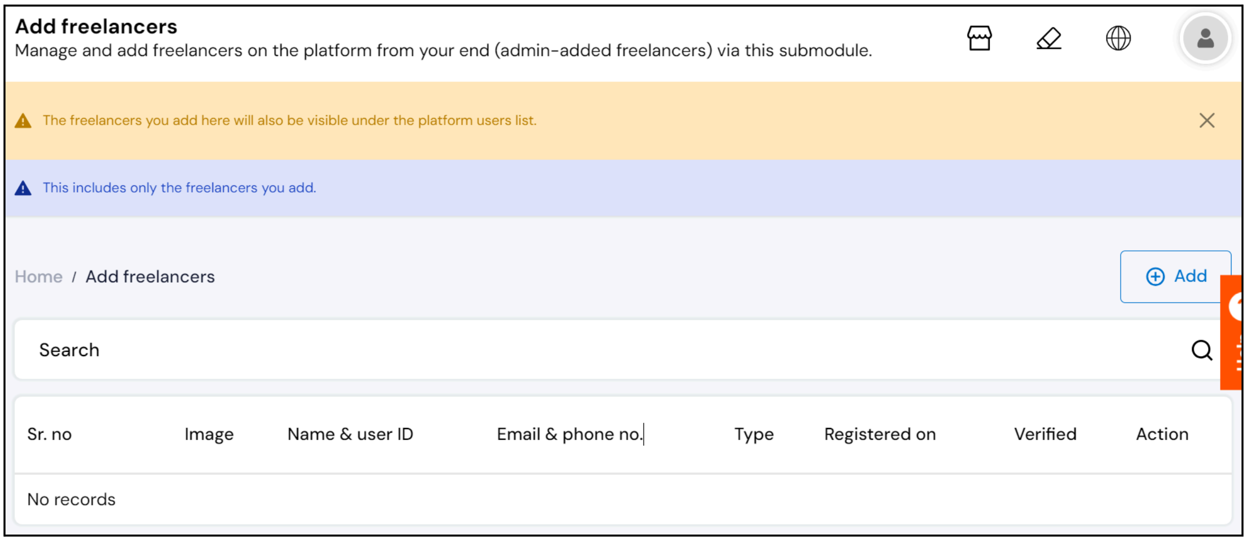
*Refer to the **Admin manual** to learn more about all the features under this page.*

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

21. Add freelancers from your end

Once you have set up the freelancer form, you can also add freelancer profiles on the platform from the admin dashboard.

To do this, go to **Users > Add freelancers**.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Create freelancer profiles and share the credentials with the respective users to access their account then.

To do this, click **Add** from the upper-right corner of the page to open the **Add freelancer** form.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Fill out the details in all the fields of all the tabs under this form to create the freelancer profile.

This form has the same tabs, sections and fields as in the freelancer registration form (the form filled by freelancers from the front end to join as a freelancer on the platform).

All the tabs, sections and fields you created in the previous steps will be visible in this form *(just as it would in the **freelancer registration form** at the front end)*.

Refer to Step 3 under Yo!Gigs v3.2 - Freelancer Getting Started Guide to know more about what needs to be filled under this form.

Follow the same process and add as many freelancer profiles from your end under this submodule.

*Refer to the **Admin manual** to learn more about all the features under this page.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

22. Sponsored freelancer

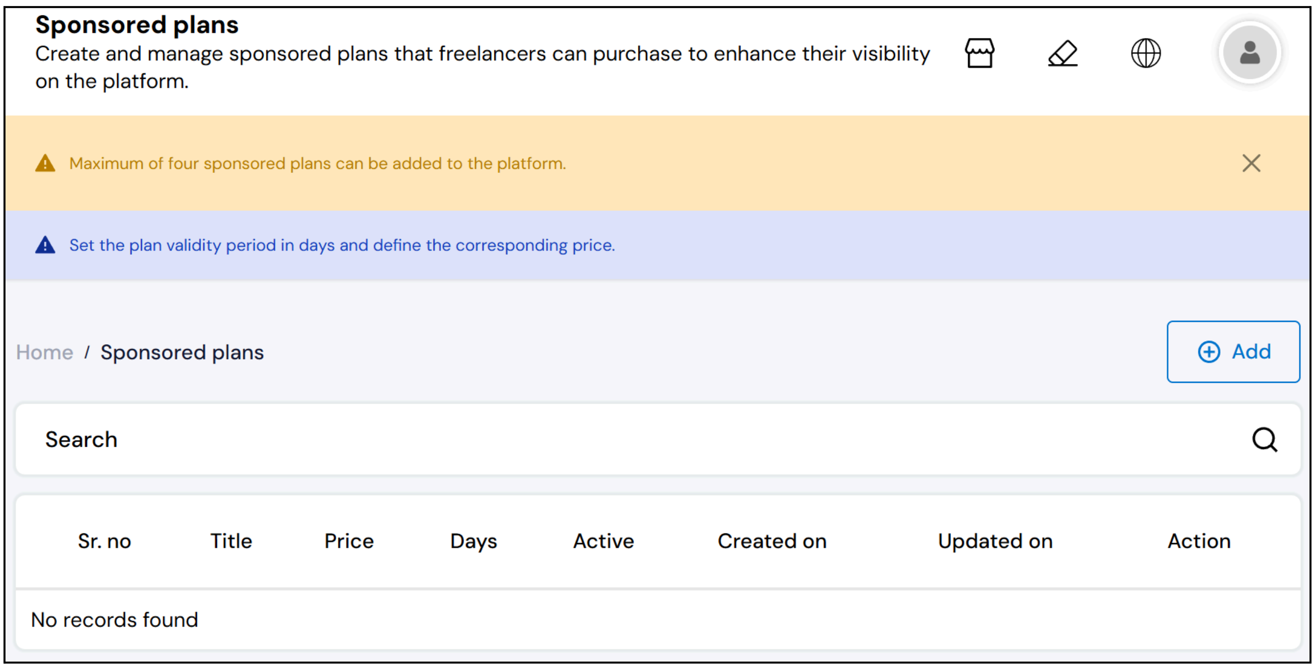
The next step involves setting up the Sponsored plans.

*This module is visible only when the sponsored freelancer module is activated under **Settings > System configurations > Common settings tab > [Sponsored freelancer settings](#)**.*

The **Sponsored freelancer module** allows you to manage the sponsored plans that freelancers can purchase to enhance their visibility on the platform.

You can create new plans as per the requirement.

To create a new plan, go to **Sponsored freelancer** > **Sponsored plans.**

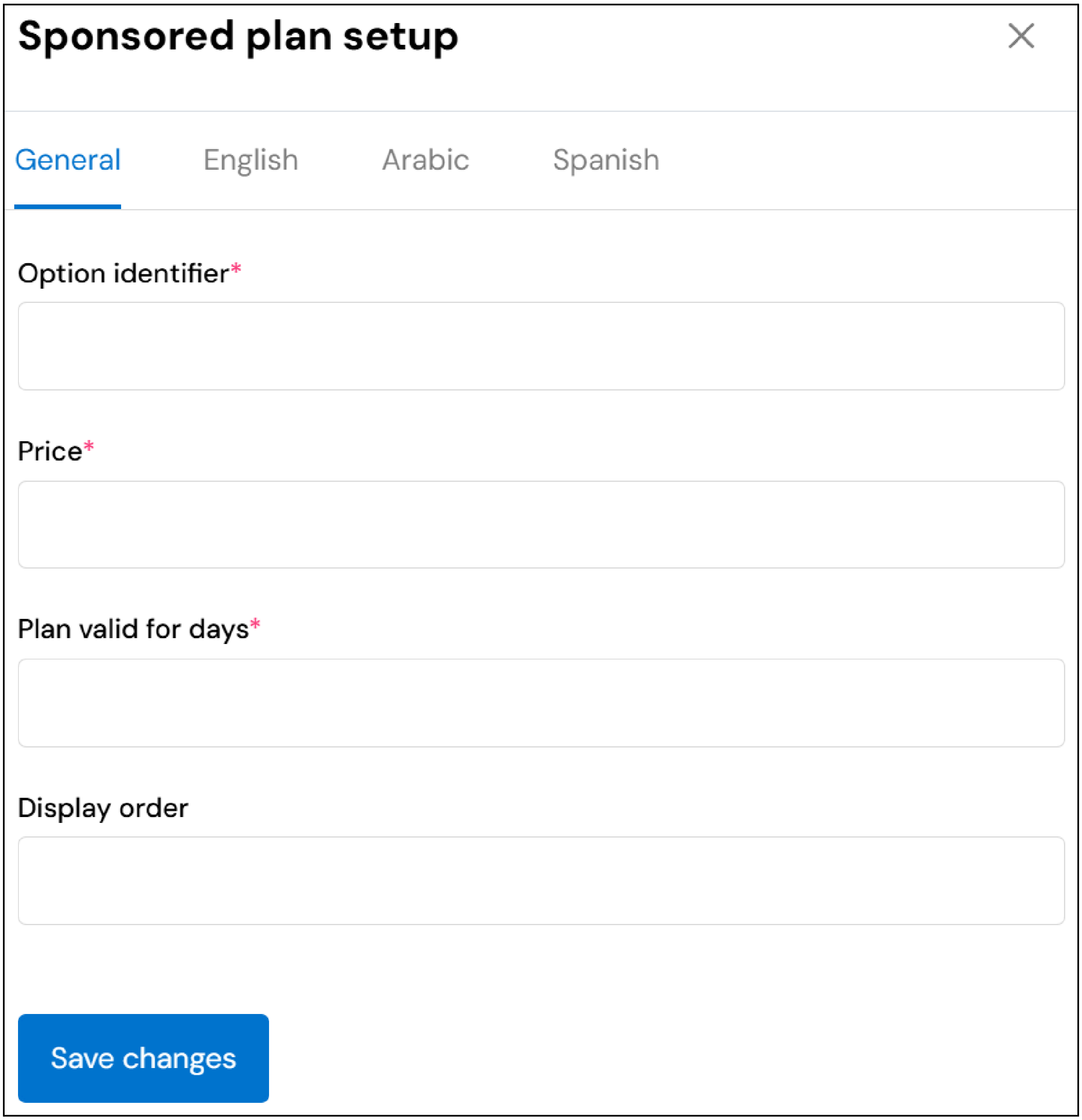


The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by adding a new plan on the platform for the freelancers.

To do this, click **Add** from the upper-right corner of the page to open the **Sponsored plan setup** form.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Option identifier*:** Enter the sponsored plan identifier.

  It can be the same as the plan name or title, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other option identifier, else an error message will appear.

- **Price*:** Enter the price of the sponsored plan.
- **Plan valid for days*:** Enter the number of days the sponsored plan will remain active.
- **Display order:** Enter the order in which the plan appears in the list.

  For instance, if you want it to appear first, enter 1.

Once done, click **Save changes**. This will direct you to the next tab, which is the default language data tab (English tab).

English tab

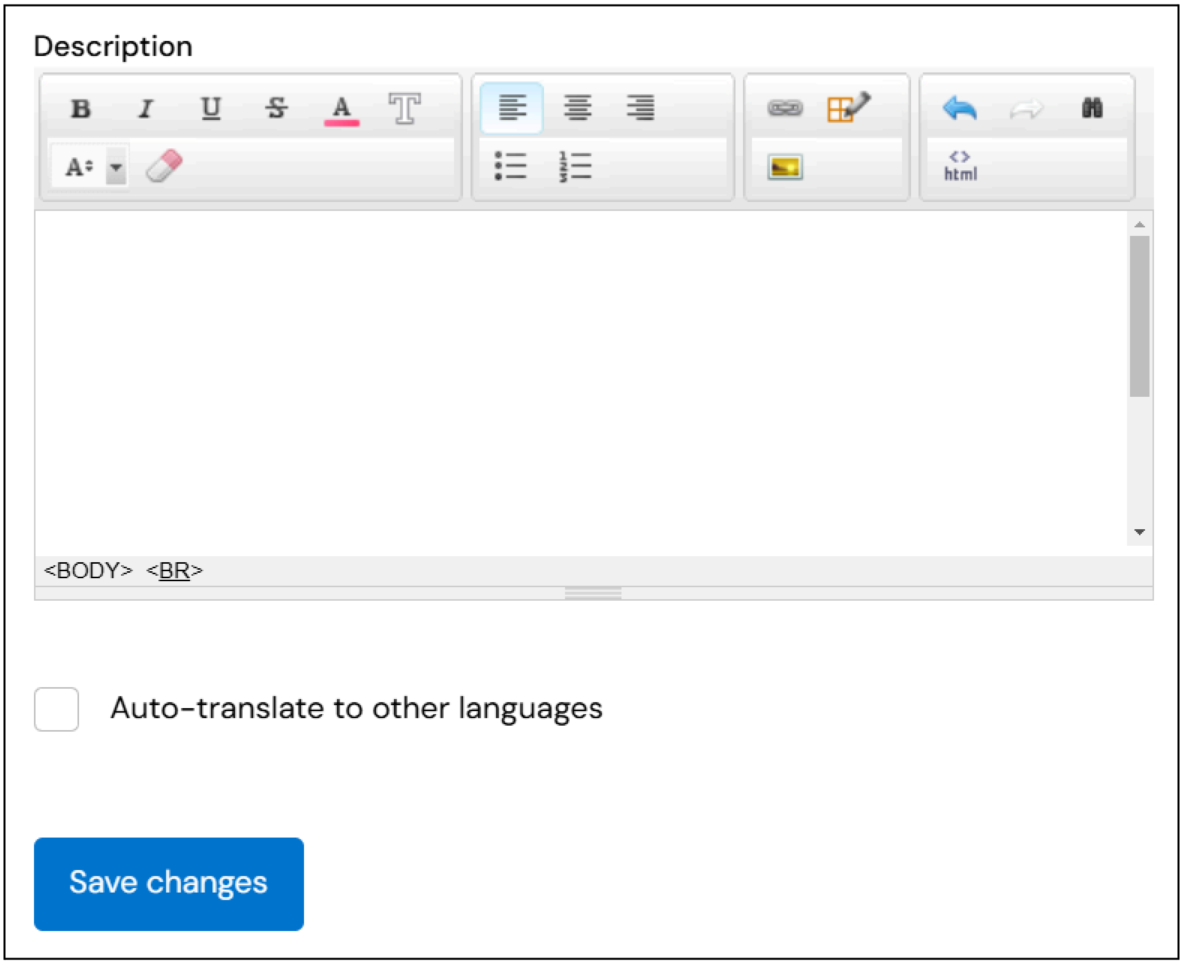
This is the default language data tab and it is mandatory to fill this tab for the sponsored plan to be published. Since **English** is set as the default language, this tab is called the English tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Title*:** Enter the name of the sponsored plan in the default language.

  This name will be displayed to freelancers under the Sponsored plans submodule.



- **Description:** Provide details about the plan, and format it according to your taste using the content editor.

  This content is displayed to the freelancers under '**View plans details**'.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations >** [Third-party APIs]() has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

If you opted to have the default language ***auto-translated into*** *the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click* ***Save changes,*** *close the form.*

You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click ***Save changes****, and close the form.*

Once done, close the form by clicking ✕ in the upper-right corner of the form.

With this, the sponsored plan will be added to the list.

A maximum of four sponsored plans can be added to the platform by following the same steps.

Use the **edit button** beside a plan to edit its information and the **delete button** beside it to delete the plan from the system.

Refer to the ***Admin manual*** *to learn more about all the features under this page.*

23. Ready-to-go service packages

The next step involves setting up the Service packages.

! *This module is visible only when the Service module is enabled under **Settings > System configurations > Common settings tab >** [Service module settings](#).*

The **Service package module** enables you to create ready-to-go services that freelancers can directly add. These service packages are listed in the marketplace and are accessible to all freelancers from their dashboards.

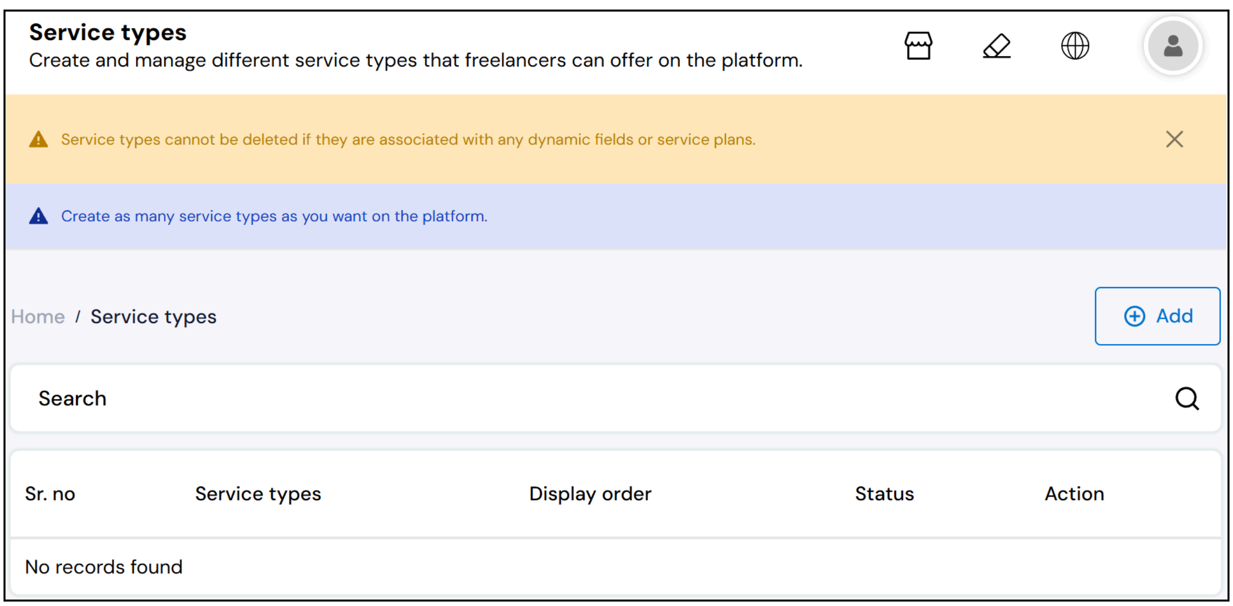
This module consists of five submodules:

23.1 Service types

Next, set up the service type.

The sub-module allows you to define and manage different service types that freelancers can offer on the platform. Multiple service types can be created, providing a structured way to categorize services. These service types act as a foundation for setting up [Dynamic fields](#), which must be configured after the service types are defined.

To create a service type, go to **Ready-to-go service packages** > **Service type.**



DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

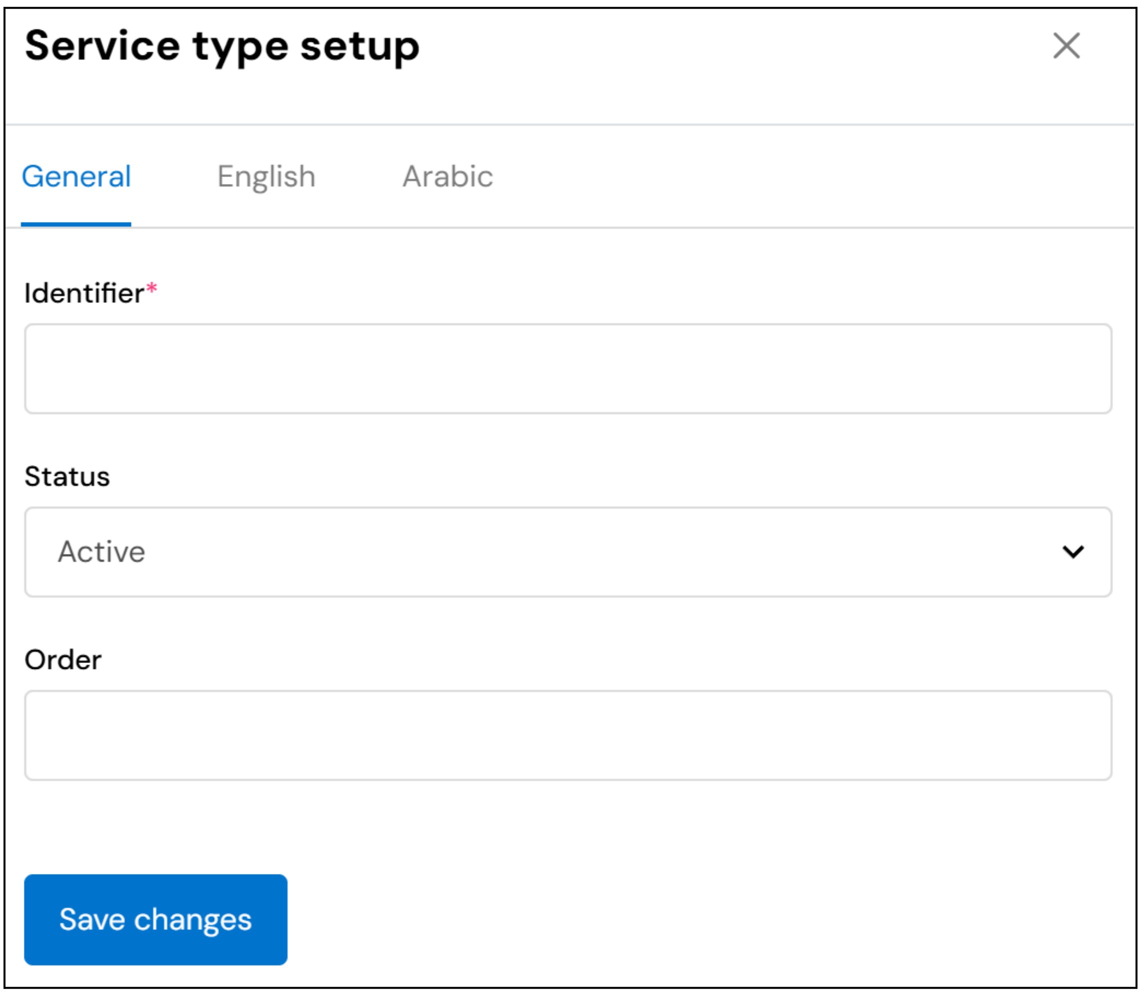
Begin by adding a service type you want on the platform.

To do this, click **Add** from the upper-right corner of the page to open the **Service type setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Identifier*:** Enter the service type identifier.

  It can be the same as the service name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other identifier, else an error message will appear.

- **Status:** Select the status of the service.

  To do this, click the field and select "**active**" to mark the service as active and publish it on the platform.

  Select "**inactive**" to hide the service for the time being, on the platform. When you deactivate a service, it will be hidden (deactivated) from the platform too.

- **Order:** Set the display order in which you want the service type to be listed on the platform.

  For instance, if you want it to appear first, enter 1.

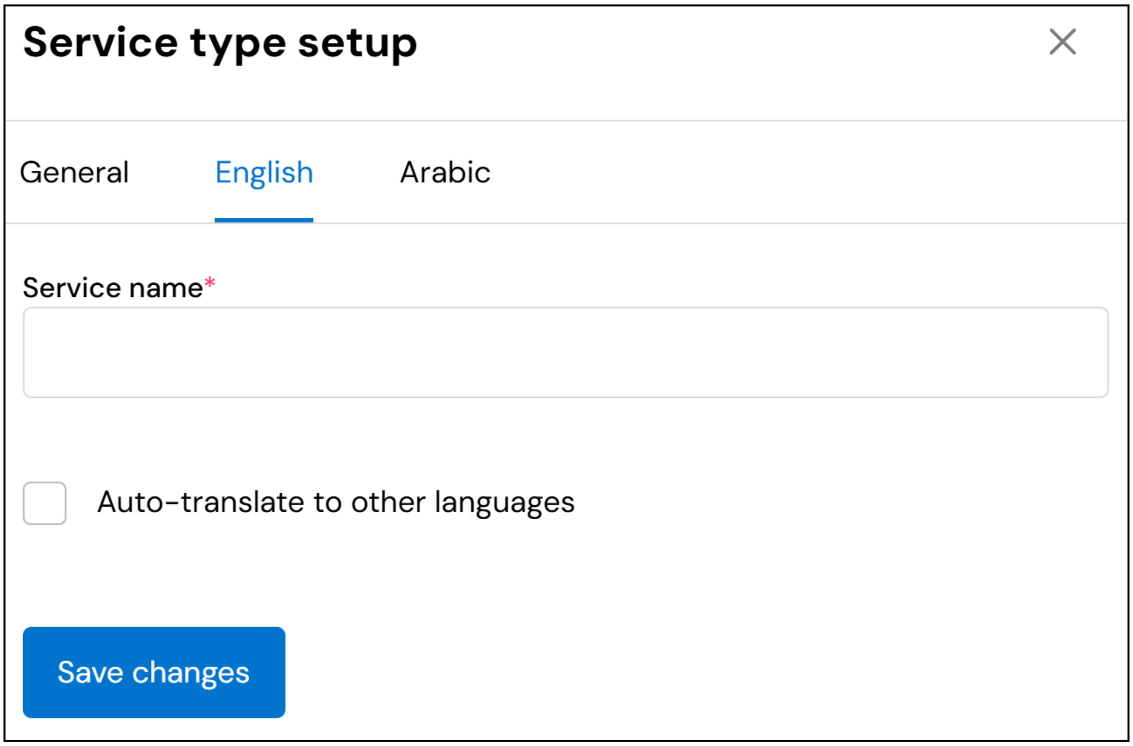
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the service type to be published.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Service name*:** Enter the name of the service in the default language.

  This name will be displayed wherever applicable on the platform.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

With this, the service type will be added to the list.

Following the same steps, add as many service types to the list that you want on the platform.

Use the **edit button** beside a service type to edit its information and the **delete button** beside it to delete the service type from the system.

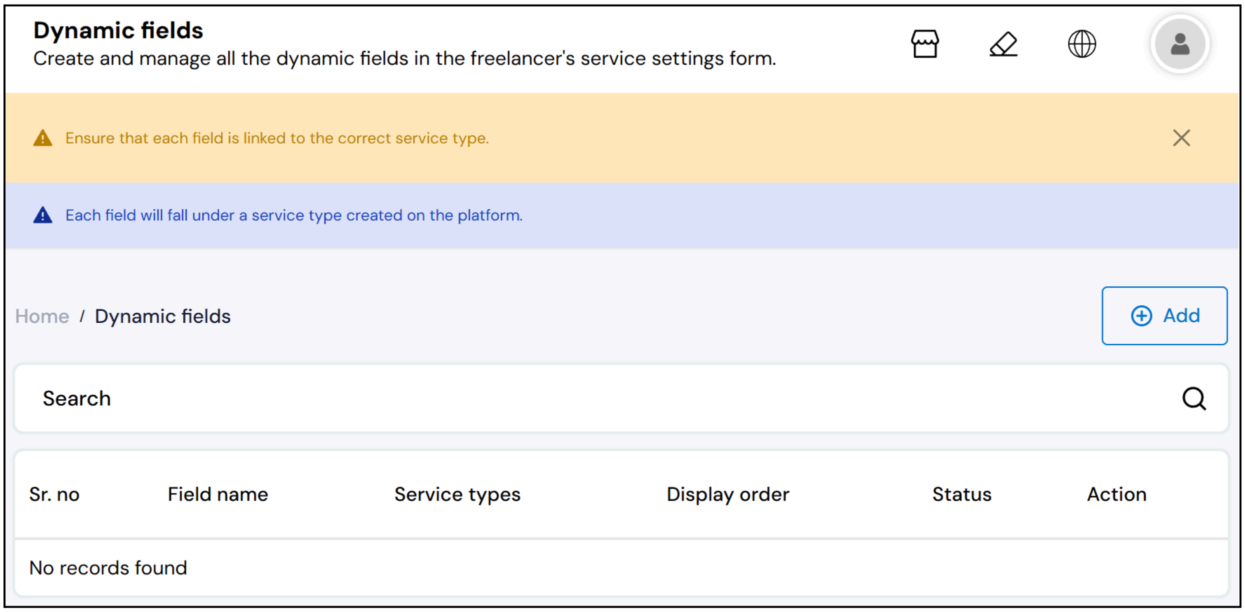
*Refer to the **Admin manual** to learn more about all the features under this page.*

23.2 Dynamic fields

The next step involves setting up the dynamic fields.

The sub-module allows you to create custom fields under specific service types. These fields help define the information freelancers need to provide when setting up their service packages. Multiple dynamic fields can be created for each service type, and they will be displayed on the platform based on the selected service type.

To create dynamic fields, go to **Ready-to-go service packages** > **Dynamic fields.**



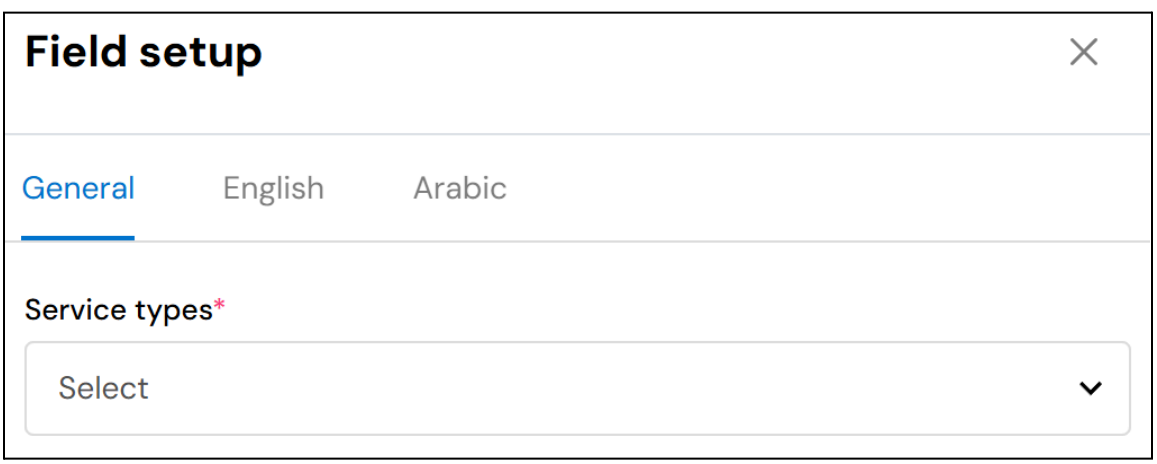
Begin by adding the fields you want on the platform.

To do this, click **Add** from the upper-right corner of the page to open the **Field setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

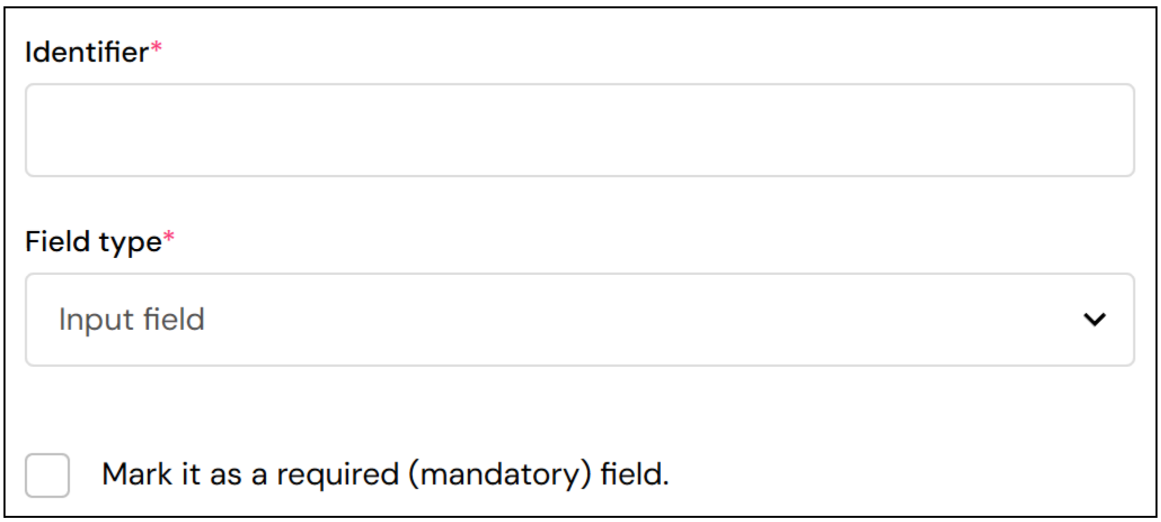
- **Service types*:** Select the service type.

  To do this, click the field and a dropdown list will appear. This list contains all the service types created earlier.

  *Manage the list of service types under **Ready-to-go service packages** > [Service types](#).*

  Select the service type from the list for which you want to create a dynamic field.

Scroll down to update the next fields:



- **Identifier*:** Enter the dynamic field identifier.

  It can be the same as the field title, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other section identifier, else an error message will appear.

- **Field type*:** Select the type of field.

  To do this, click the field to select the following options from the dropdown list that appears:

  - Input field

- Text area field
- Dropdown list field
- Checkbox field
- Radio options field
- Date field
- Upload document field
- Email field

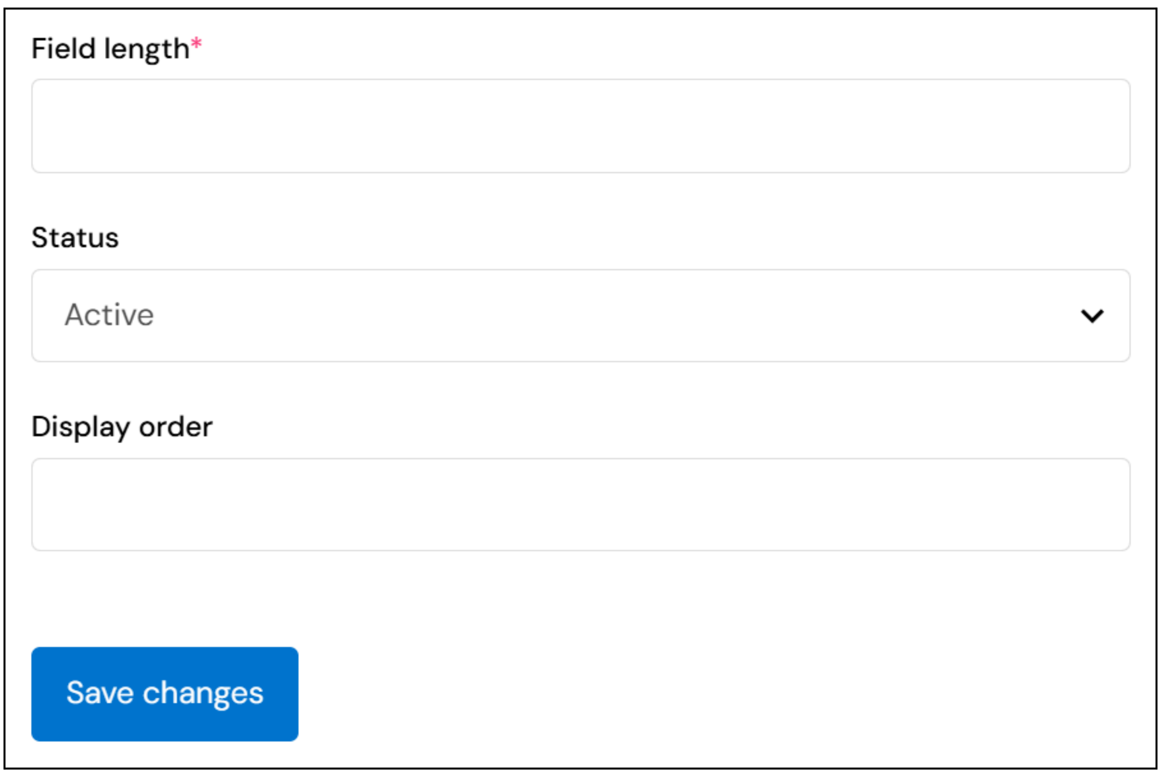
Make your selection based on the information type you are trying to collect via this field.

- **Mark it as a required (mandatory) field:** Check mark this to make this field a mandatory field.

  The user will not be able to save the details and move to the next tab without filling out the mandatory field.

  Leave the checkbox unselected or deselect it if you do not want to mark this field as a mandatory field. In this case, freelancers can skip this field.

Scroll down to update the rest of the fields under this form:



Additional (and different) fields will appear for each field type selected.

Each situation has been explored:

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

i. Input field

The following field will appear. Edit it accordingly:

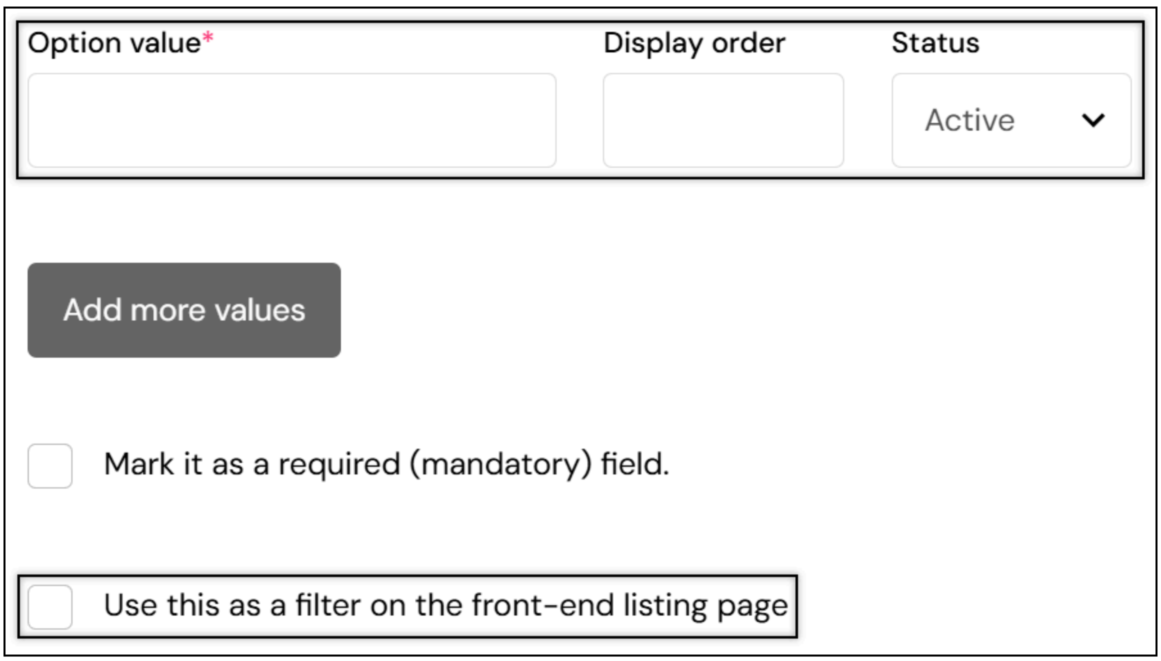
- **Field length:** Enter the characters length of the input field. It will restrict the user from entering more characters than those set.

ii. Text area field; Email field

No additional field will appear for these two field types.

iii. Dropdown list field; Checkbox field, Radio options field

The following fields will appear if you select any of these three options:



Use the option value, display order and status fields to create the values (options) that will be displayed in the dropdown list/radio button options/checkbox options.

- **Option value*:** Enter the option name or value.

  For instance, if the dropdown list, radio button, or checkbox options represent different service durations, the first option could be 'Basic - 5 Days delivery.'

- **Display order:** Enter the order in which this option will appear under this field type.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

For instance, if you want it to appear first, enter 1.

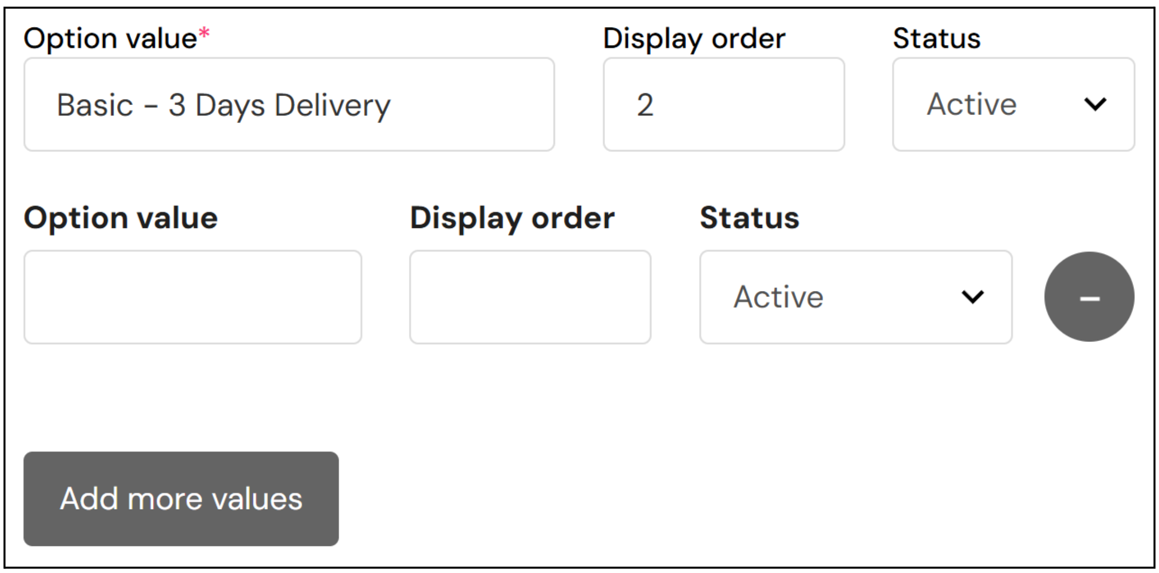
- **Status:** Select the status of the option.

  To do this, click the field and select "**active**" to mark the option as active to display it in this field type on the freelancer Service settings form.

  Select "**inactive**" to hide the option in this field type on the freelancer Service settings form. In this case, this option will not be visible and cannot be selected by any freelancer.

With this, one option value is created.

To add another option value, click **Add more values** and a new set of fields will appear. Add as many reasonable numbers of options as required for the field type following this process.



If you clicked the **Add more values** button by mistake, click – beside the new fields to remove them.

Once all the options have been added, move to the next field:

- **Use this as a filter on the front-end listing page:** Check mark this to use the options created for this field as a filter for the freelancer Service settings at the front end.

  Clients will be able to narrow down their search by using these filters and get exactly what they are looking for.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

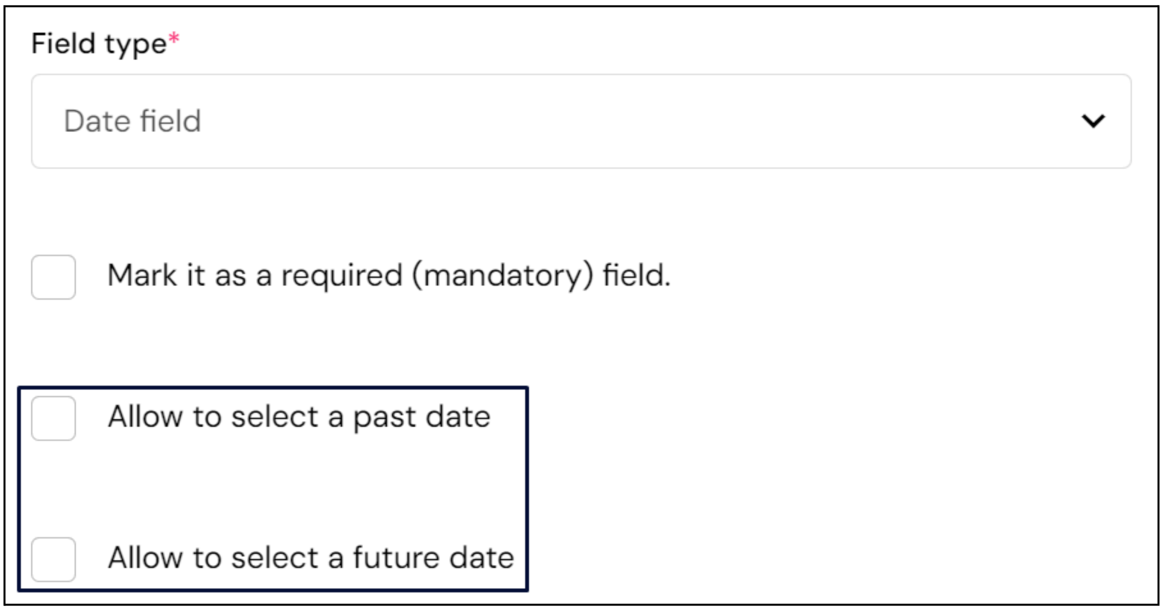
Leave the checkbox unselected or deselect it if you do not want to use this as a field for the freelancer listing page.

*There is a limit that can be set for the number of dynamic filters you can create using this feature. Manage this setting under **Settings > System configurations > Common settings tab.***

If the number of dynamic filters limit reaches, this field will still be visible; however, an error will appear when you select it.

iv. Date field

The following fields will appear. Edit them accordingly:



- **Allow to select a past date:** Check mark this to allow the freelancer to select a date that falls before the current date (an older date).

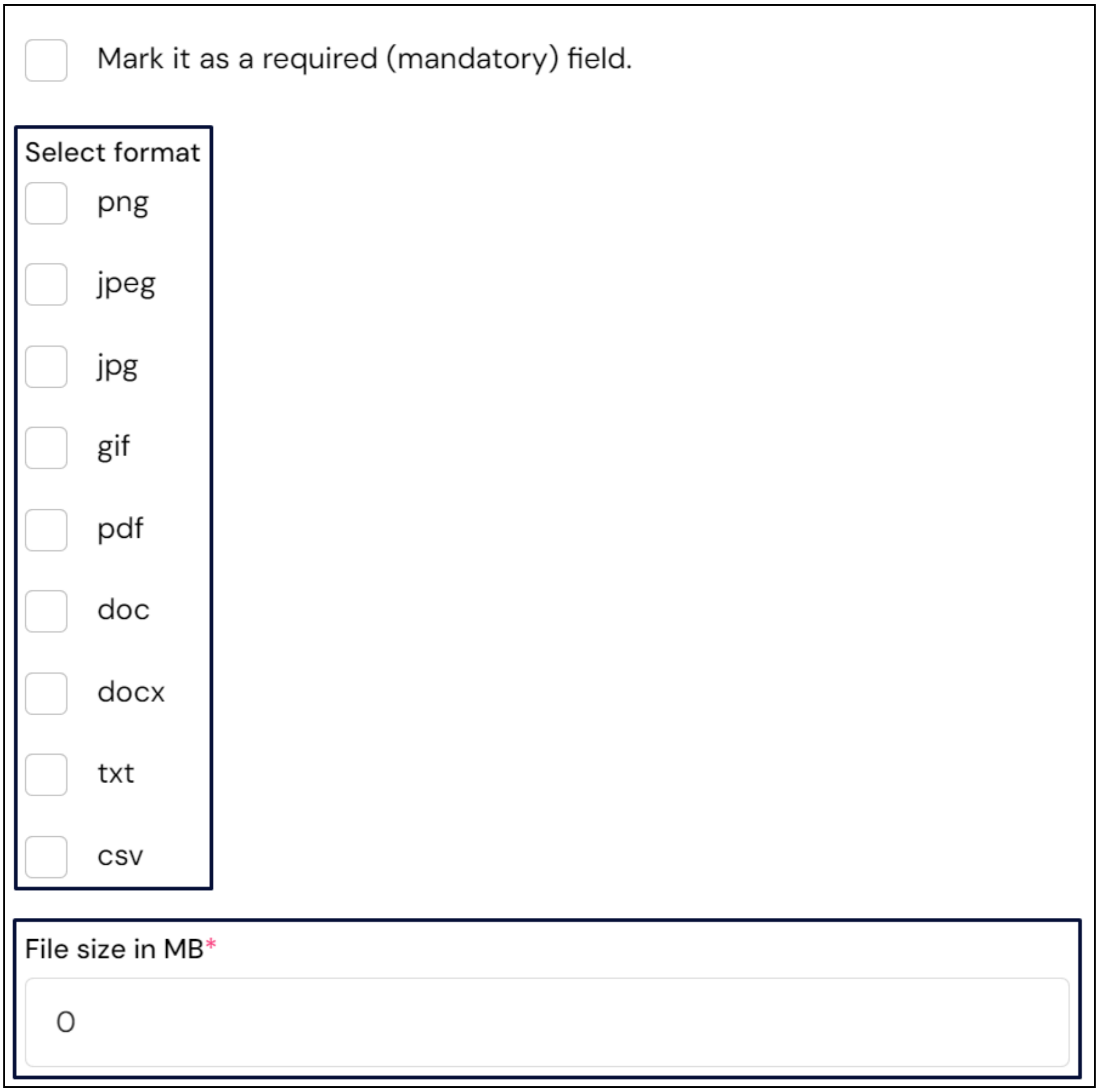
  Leave the checkbox unselected or deselect it if you do not want to allow the freelancer to select an old date.

- **Allow to select a future date:** Check mark this to allow the freelancer to select a date that falls after the current date (a future date).

  Leave the checkbox unselected or deselect it if you do not want to allow the freelancer to select a future date.

v. Upload document field

The following fields will appear. Edit them accordingly:



- **Select format:** Check mark the document formats you can accept from the user. The user will only be able to upload documents that are of the selected format.

  Leave those checkboxes unselected or deselect those formats that you do not accept for the document.

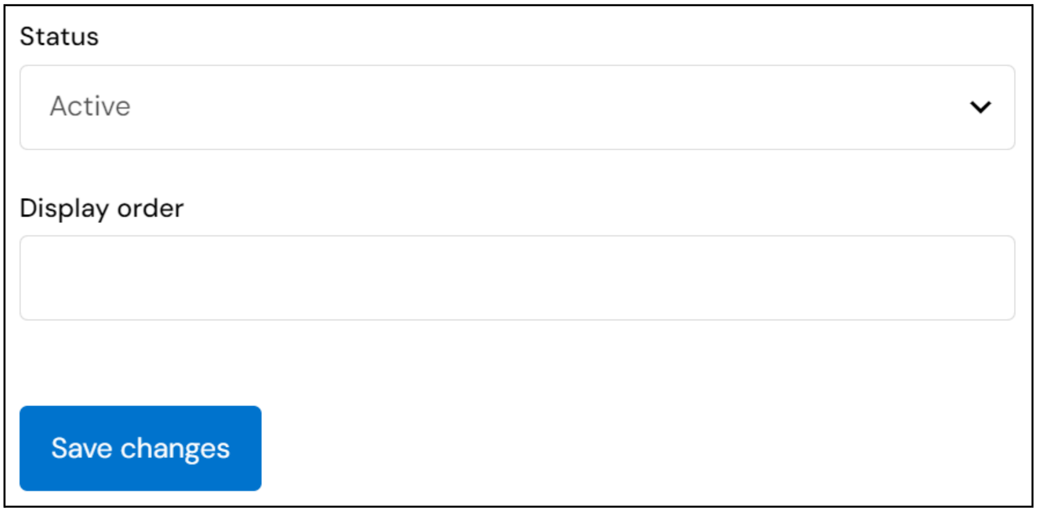
  If you do not select even one format, users won't be able to upload any document. So, kindly ensure you select at least one format from the list.

- **File size in MB*:** Enter the maximum size the document can be of, in megabytes.

<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

For instance, if the maximum file size you want is 2 MB, enter 2 in this field. And the freelancers won't be able to upload any file whose size is larger than 2 MB.

Once you have updated the field type and its related field details, move to on to fill the last fields of the form:



- **Status:** Select the status of the dynamic field.

  To do this, click the field and select "**active**" to mark the dynamic field as active under the selected service type.

  Select "**inactive**" to hide the dynamic field. In this case, this field will not be visible under the selected service type to the freelancer.

- **Display order:** Enter the order in which this dynamic field will appear under the selected service type.

  For instance, if you want it to appear first, enter 1.

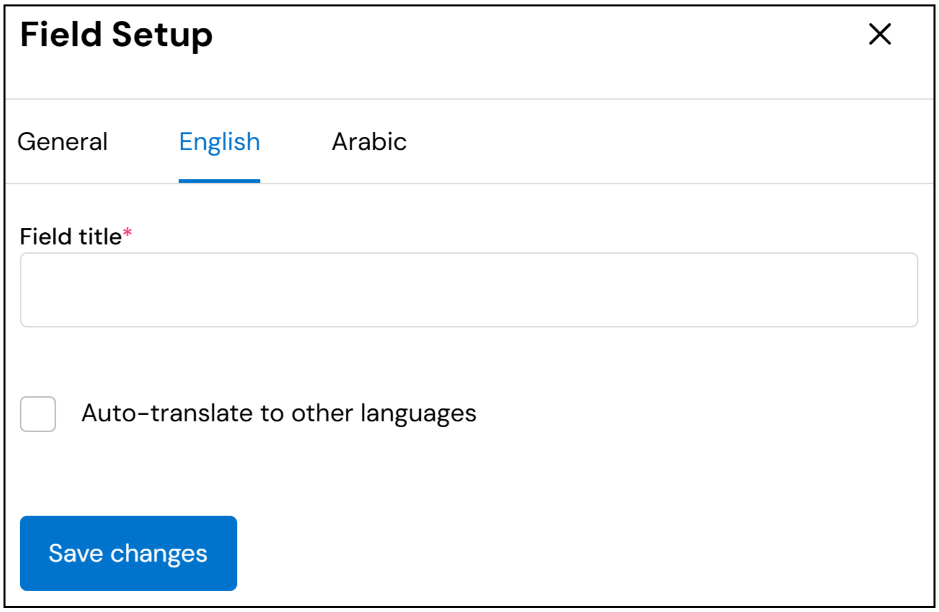
Once done, click **Save changes**.

This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the dynamic fields to be published.

Since **English** is set as the default language, this tab is called the English tab.



Update the following:

- **Field title*:** Enter the title of the dynamic field in the default language.

  This title will be displayed on the Service setting form depending on the Service type selected by the freelancer.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations > Third-party APIs** has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

With this, the dynamic field will be added under the service type selected.

Following the same steps, add as many dynamic fields under the created service type you want on the platform.

Use the **edit button** beside a dynamic field to edit its information and the **delete button** beside it to delete the dynamic field from the system.

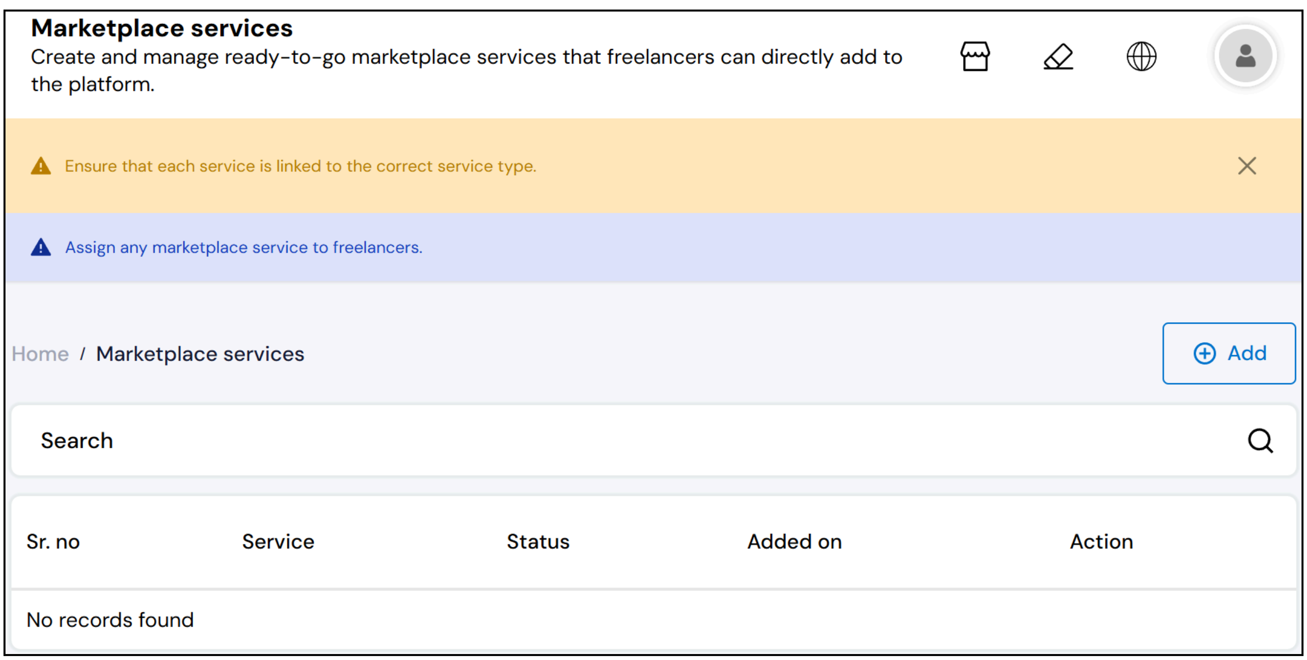
*Refer to the **Admin manual** to learn more about all the features under this page.*

23.3 Marketplace services

The next step involves setting up the Marketplace services.

The sub-module allows you to create ready-to-go services that freelancers can directly add to their platform. Multiple services can be created under this page, ensuring that freelancers have access to pre-configured service options.

To create Marketplace services, go to **Ready-to-go service packages** > **Marketplace servicers.**



<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

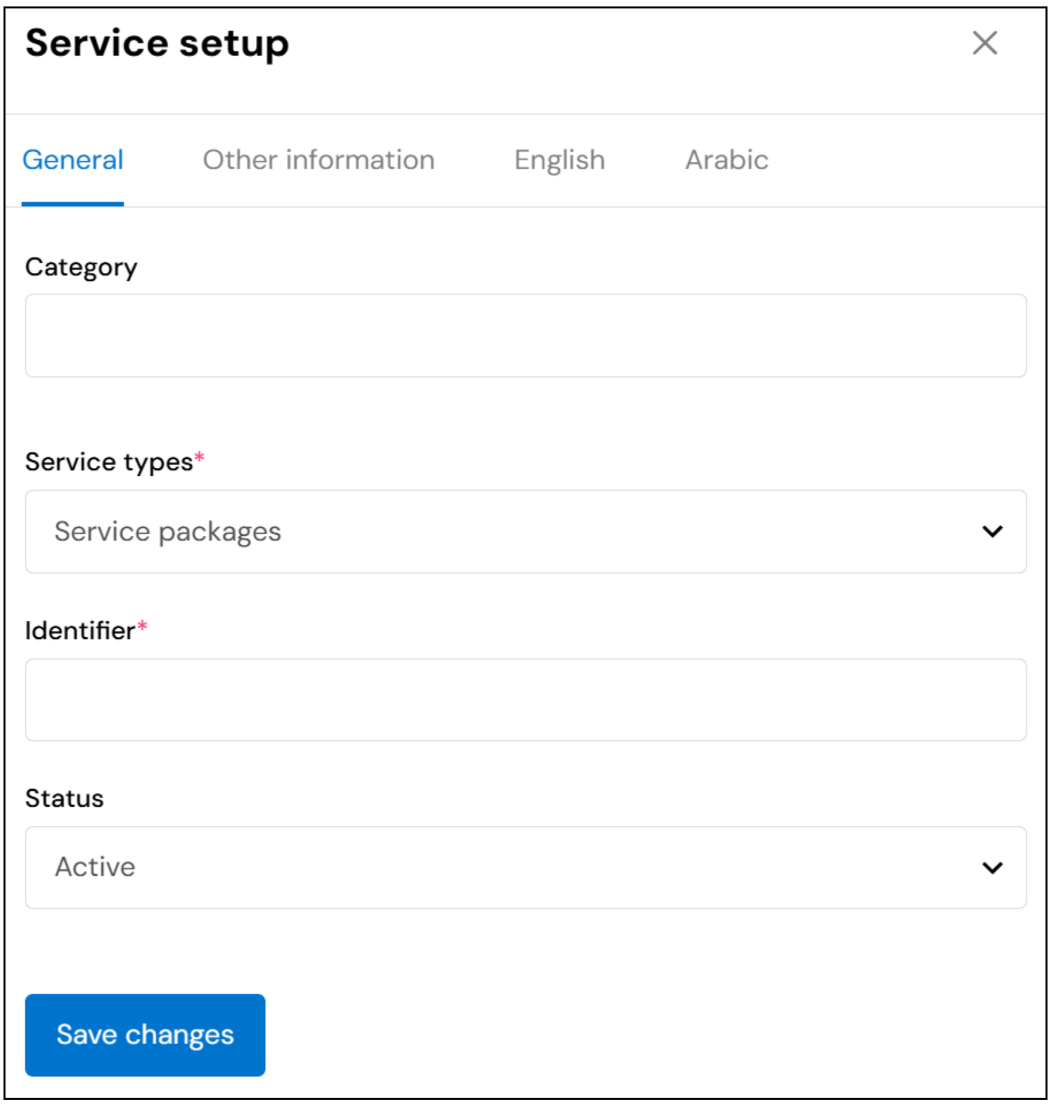
Begin by adding the services you want on the platform.

To do this, click **Add** from the upper-right corner of the page to open the **Service setup** form.

There are multiple tabs under this form.

The very first tab is the General tab, followed by the other information tab, then the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.



DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Category:** Select the category.

  To do this, click the field and a dropdown list will appear. Multiple categories can be selected from the list.

  *Manage the list of Categories under **User preferences** > [Categories](#).*

- **Service types*:** Select the service type for which you want to create the marketplace service for the freelancers.

  To do this, click the field and a dropdown list of all the active service types will appear.

  Based on the selection the fields under the [Other information tab](#) will appear.

  *Manage the list of Service types under **Ready-to-go service packages** > [Service types](#).*

- **Identifier*:** Enter the service identifier.

  It can be the same as the service name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other identifier, else an error message will appear.

- **Status:** Select the status of the service.

  To do this, click the field and select "**active**" to mark the service as active and publish it on the platform.

  Select "**inactive**" to hide the service for the time being, on the platform.

  When you deactivate a service, it will be hidden from the freelancer under marketplace service subsection.

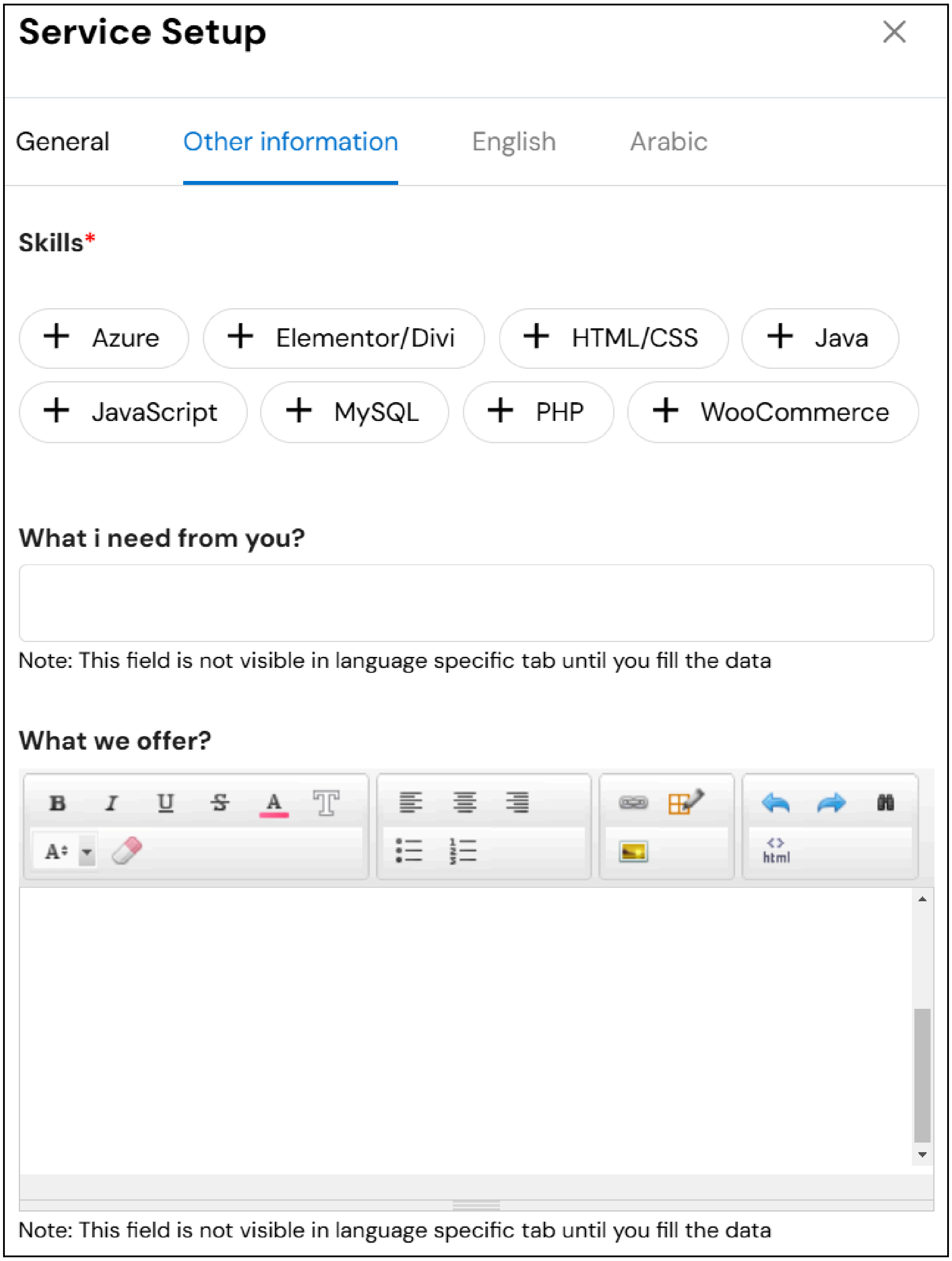
Once done, click **Save changes**.

This will direct you to the next tab, which is the **Other information tab.**

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Other information tab

The fields under this tab, located below the Skills section, are dynamic and created by you. They may vary based on the selected service type and the fields added.



DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Skills*:** All the applicable skills that fall under the selected parent category and subcategory will be listed here. Select the skills required for this service by clicking it.

  Freelancers can modify the selected skills based on their preferences when adding this service from the marketplace.

*Manage the list of skills under **User preferences** > Skills.*

The remaining fields under this tab are dynamic and created by you (the admin) based on platform requirements, so they may vary from those shown here.

Fill out all the dynamic fields, especially the mandatory ones, to proceed.

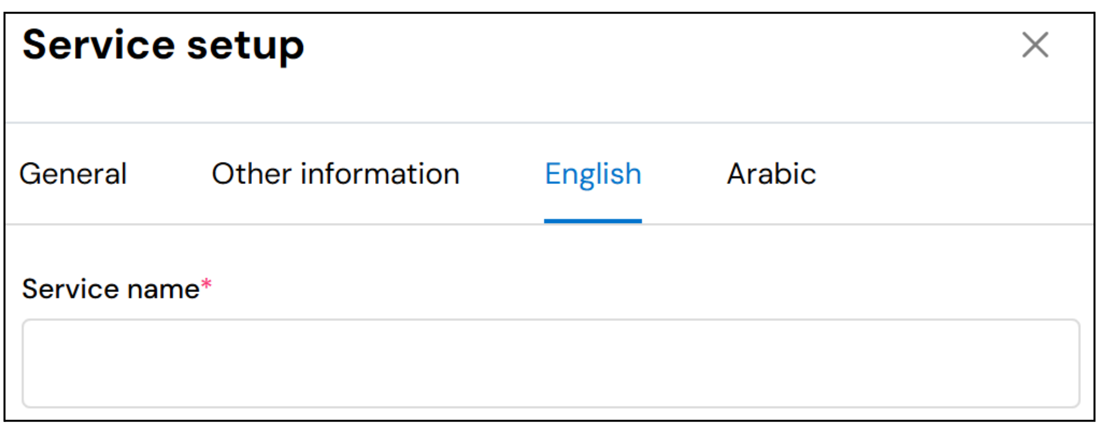
The fields under the language-specific tabs (English, Arabic) will only become visible once data is entered in the respective fields under the Other information tab. Ensure that you fill out the required details in the other information tab first to enable these fields for translation.

Once done, click **Save changes**.

*You can skip the Other information tab if you do not wish to fill it out at the moment. Simply enter the required details in the General tab, click **Save changes**, and close the form. However, if you skip the Other information tab, you will not be able to proceed with filling out the secondary language data tab(s).*

English tab

This is the default language data tab. Since **English** is set as the default language, this tab is called the English tab.



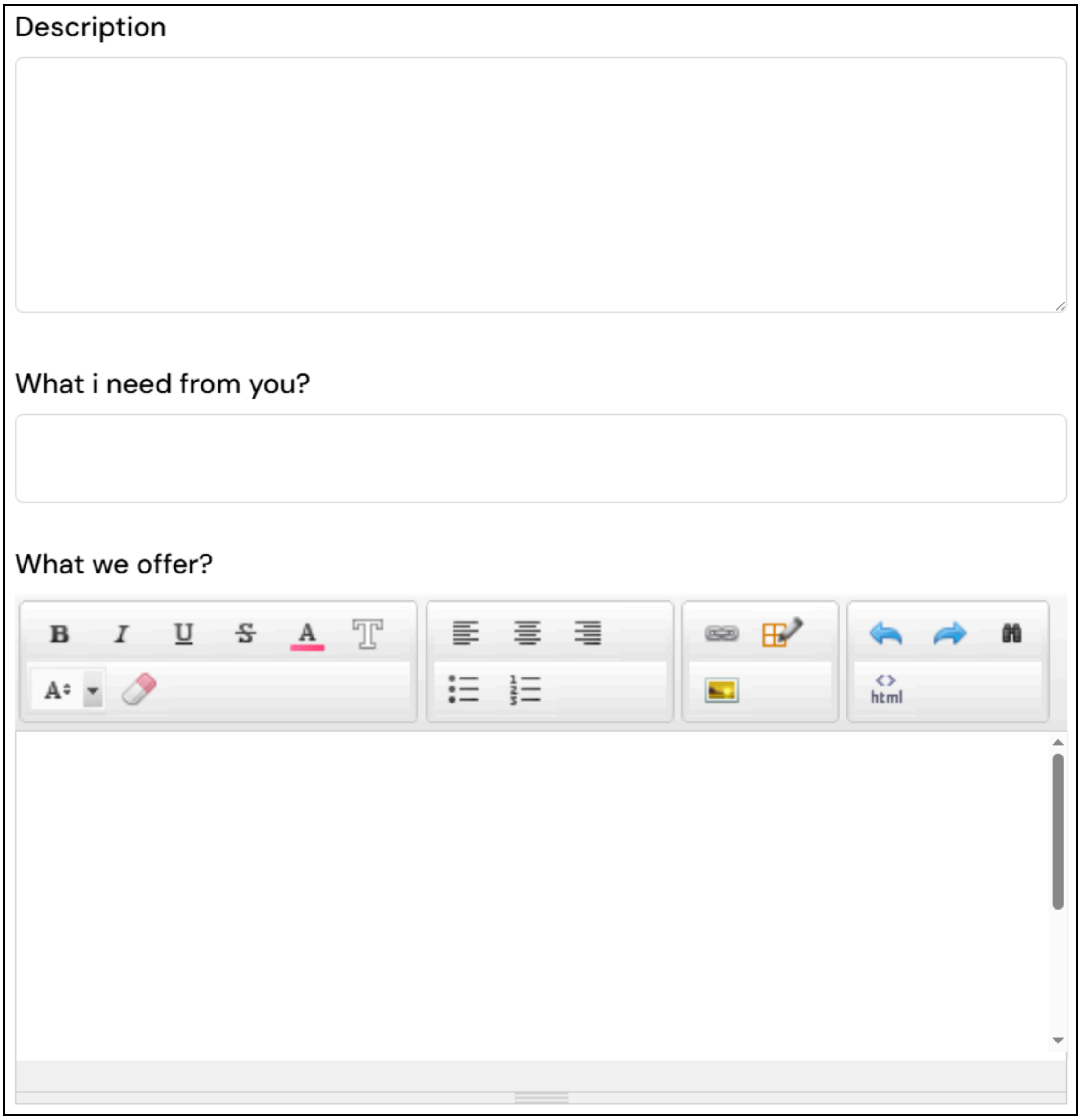
DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Service name*:** Enter the name of service in the default language.

  This name will be displayed to the freelancer on the marketplace service subsection.

Scroll down to update the next fields.



- **Description:** Provide details about the service, and format it according to your taste using the content editor.

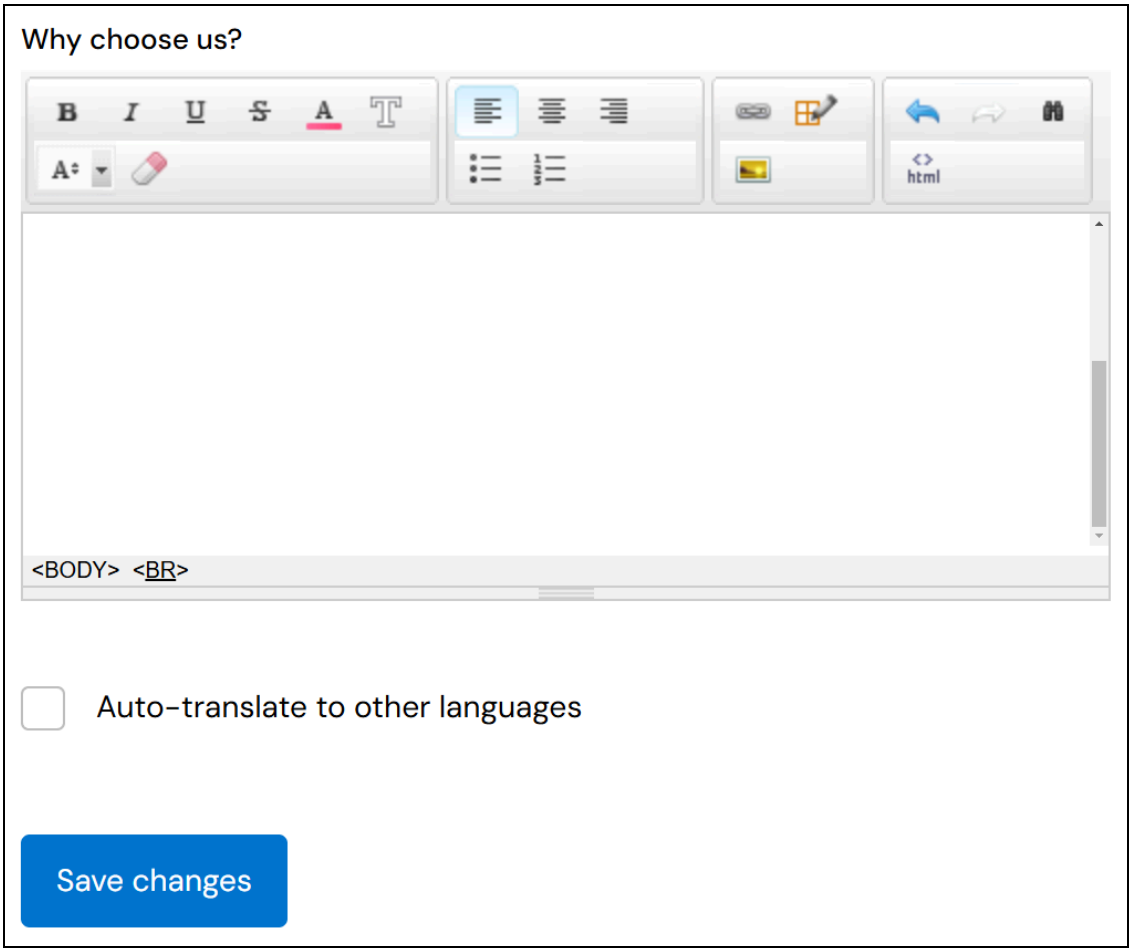
  This content is displayed to the freelancers under '**View service detail**'.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The remaining fields under this tab are dynamic and created by you (the admin) based on platform requirements, so they may vary from those shown here.

Fill out all the dynamic fields, especially the mandatory ones, to proceed.

Scroll down to update the rest of the fields under this form:



- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically. With this, the data under the next language tab(s) gets auto-filled.

  ! *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations >** [Third-party APIs] has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

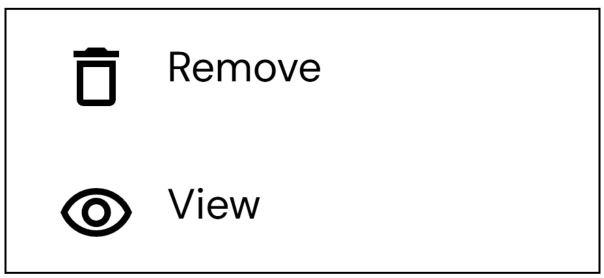
*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

Once done, close the form by clicking in the upper-right corner of the form.

With this, the service will be added under the marketplace services.

Following the same steps, add as many services under the marketplace services you want on the platform.

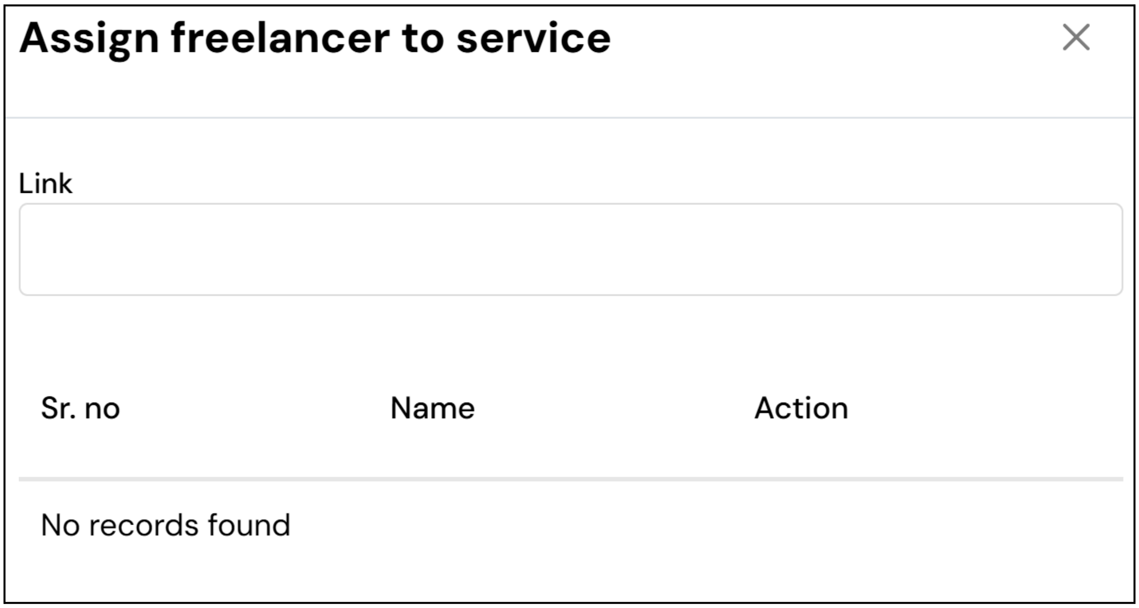
Use the **edit button** beside a Marketplace services to edit its information and the **an ellipsis button** beside it to access the **delete** and **view button**.



Click **delete button** to delete the service from the system and **view button** to view the related information.

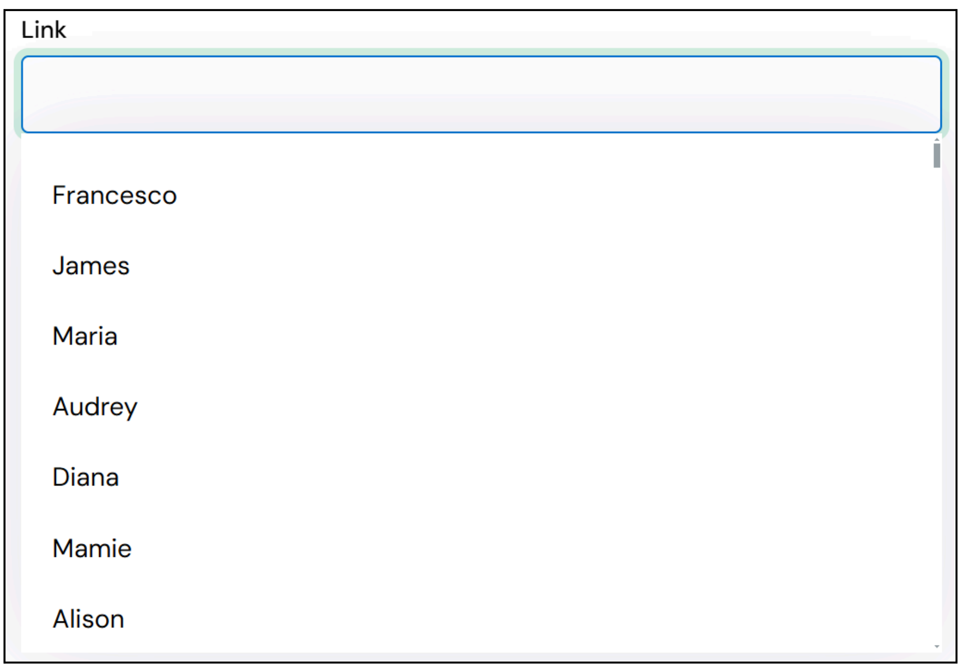
To assign marketplace service to the freelancer, click the **assign service to freelancer button** , and the **Assign freelancer to service form** will appear.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

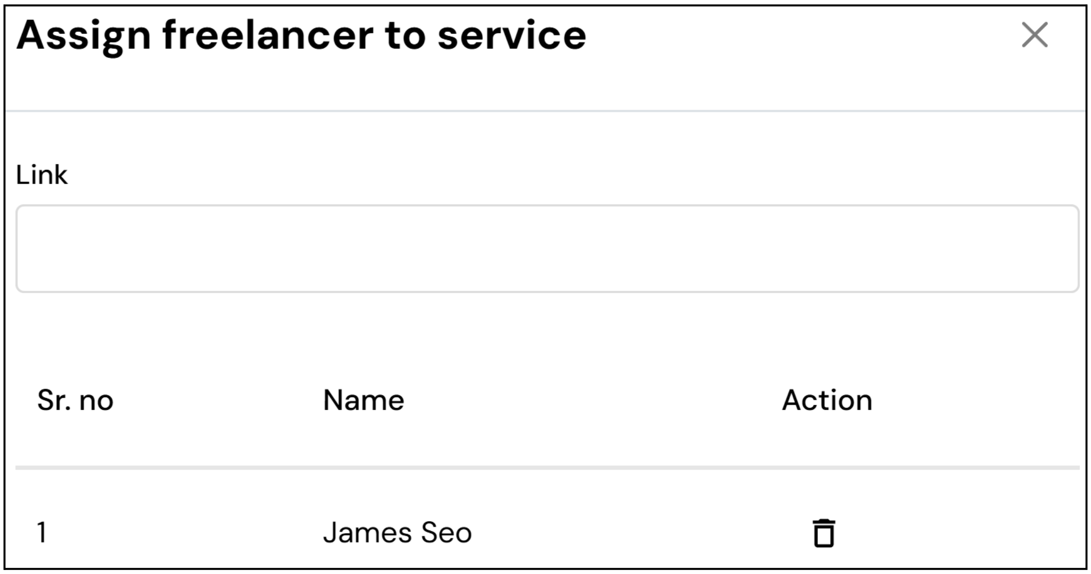


Since you have just added the service but have not linked a freelancer, the records will be empty.

To do this, click the field below Link, and a list of freelancers will appear.



Select the freelancer to whom you want to assign the service. Once selected the name of the freelancer will appear in the records.



Following the same steps, assign the service to as many freelancers as you want on the platform.

Use the **delete button** to remove the freelancer from the assigned service.

Once done, close the form by clicking in the upper-right corner of the form.

Refer to the ***Admin manual*** *to learn more about all the features under this page.*

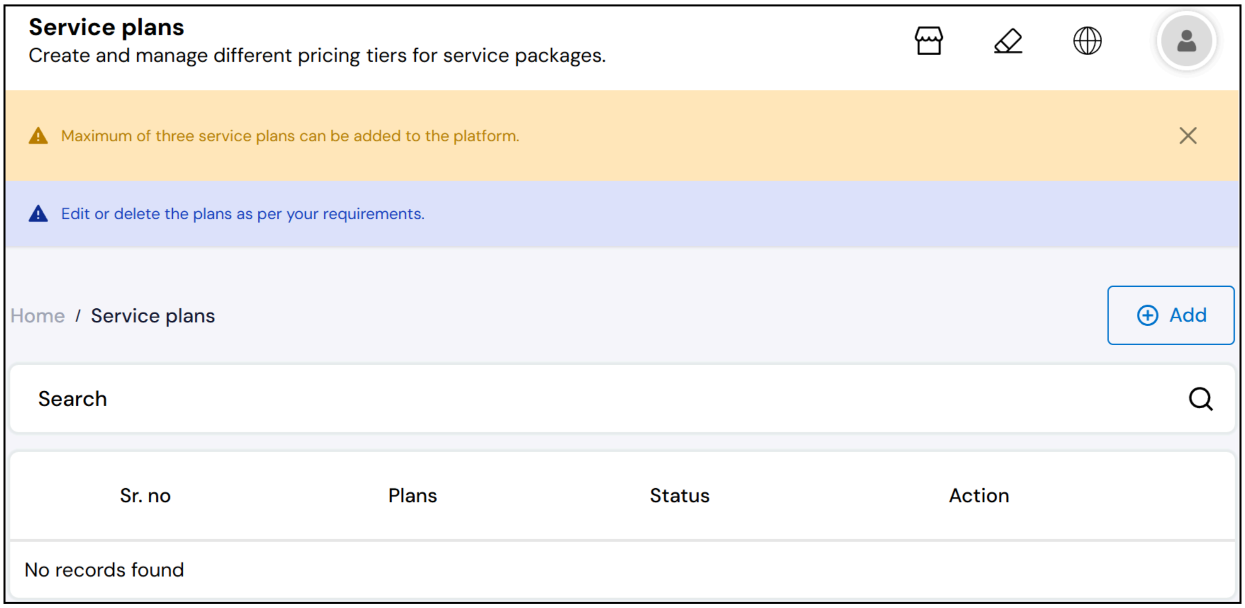
23.4 Service plans

The next step involves setting up the service plans.

The sub-module allows you to define different pricing tiers for service packages. These plans help structure the services into different levels, with varying features and pricing options.

To define plans, go to **Ready-to-go service packages** > **service plans.**

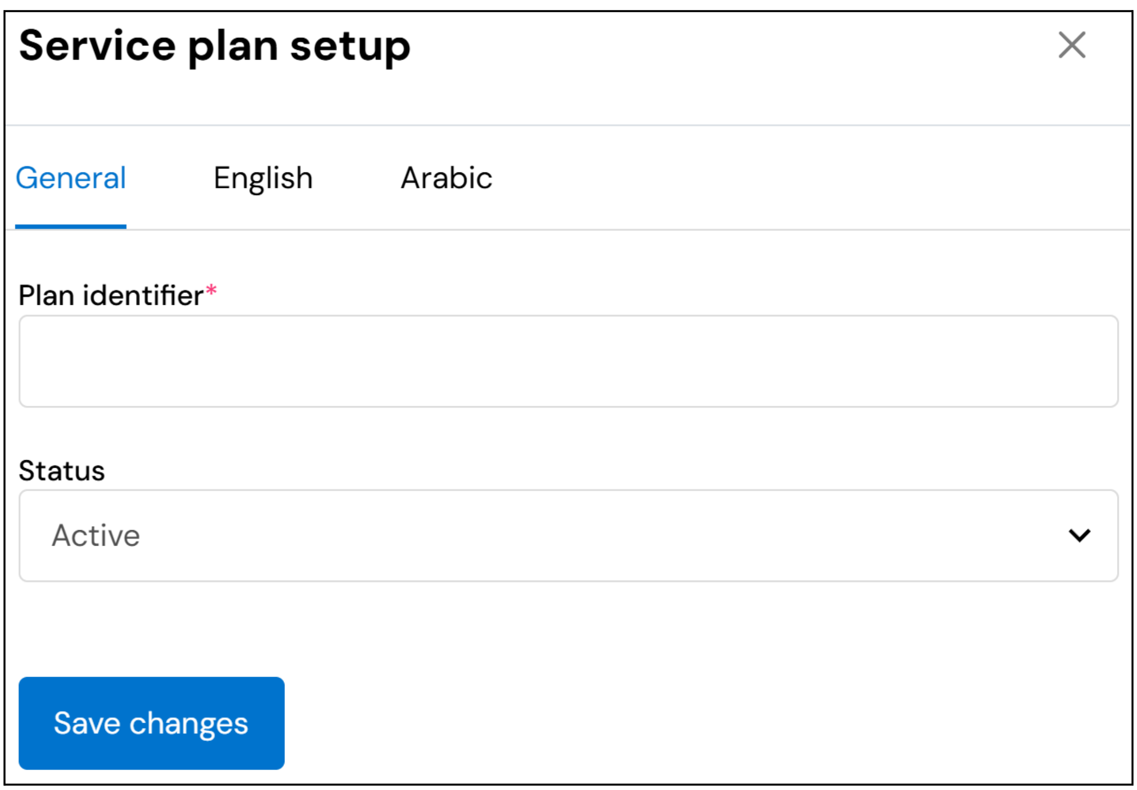
<u>**DISCLAIMER:**</u> The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Begin by setting up the plans you want on the platform.

To do this, click **Add** from the upper-right corner of the page to open the **Service plan setup** form.



There are multiple tabs under this form.

The very first tab is the General tab, followed by the other information tab, then the default language tab, and then the secondary language tabs. The number of secondary language tabs will depend on the number of languages your platform is available in.

Let us begin with the General tab.

General tab

Update the following:

- **Plan identifier:** Enter the plan identifier.

  It can be the same as the plan name, which will be defined under the language data tab.

  An identifier is used to save the data in the system and will not be displayed anywhere on the platform.

  Ensure that the identifier is unique and unlike any other plan identifier, else an error message will appear.

- **Status:** Select the status of the service plan.

  To do this, click the field and select "**active**" to mark the service plan as active and publish it on the platform.

  Select "**inactive**" to hide the service plan for the time being, on the platform. When you deactivate a service, it will be hidden from the freelancer under Service setting setup form.

Once done, click **Save changes**.

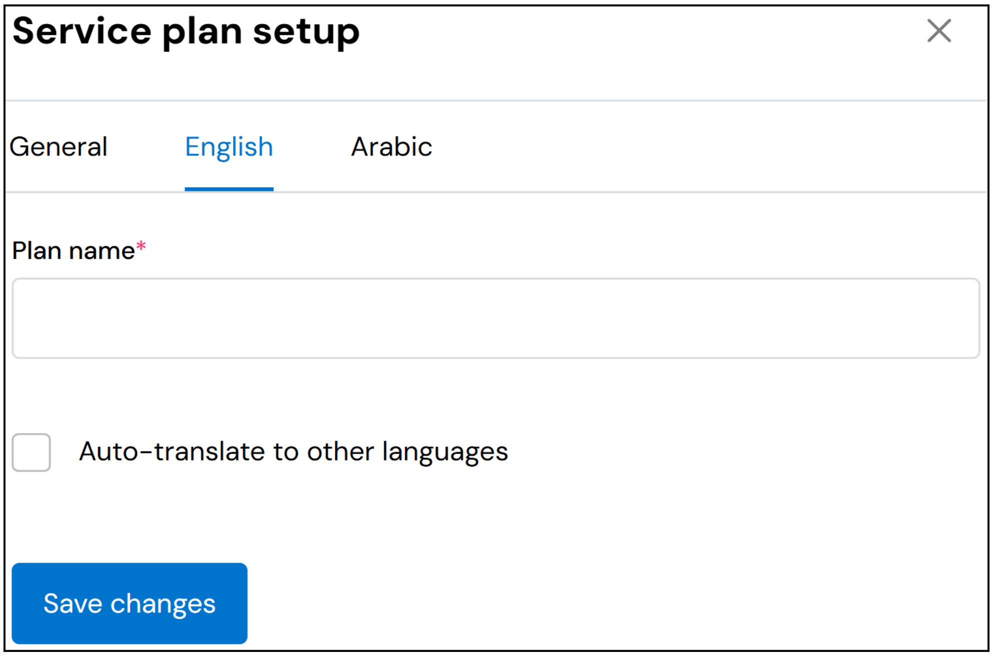
This will direct you to the next tab, which is the default language data tab (English tab).

English tab

This is the default language data tab and it is mandatory to fill this tab for the service plan to be published.

Since **English** is set as the default language, this tab is called the English tab.

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Update the following:

- **Plan name*:** Enter the name of the service plan in the default language.

  This name will be displayed on the Service setting form under the Plans tab to the freelancer.

- **Auto-translate to other languages:** Check mark this to update the secondary language(s) data automatically.

  With this, the data under the next language tab(s) gets auto-filled.

  *This option is visible only when the **Microsoft translator API** feature under **Settings > System configurations >** [Third-party APIs](#) has been configured.*

  Deselect or leave the checkbox unselected if you want to fill the secondary language(s) data on your own.

Once done, click **Save changes**.

The next tab(s) after this is the secondary language tab(s) (Arabic) and will all have the same fields as the English tab. You can edit the details for it and save.

*If you opted to have the default language **auto-translated into** the secondary language(s), the secondary language tab(s) will be prefilled. In this case, review the data in the secondary language tab(s), edit if necessary, click **Save changes,** close the form.*

*You can also skip the secondary language data tab(s) if you do not want to fill it at the moment. Simply fill in the data of the default language tab (English tab), click **Save changes**, and close the form.*

DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once done, close the form by clicking in the upper-right corner of the form.

With this, the Service plan will be added to the list.

A maximum of three service plans can be added to the platform by following the same steps.

Use the **edit button** beside a service plan to edit its information and the **delete button** beside it to delete the service plan from the system.

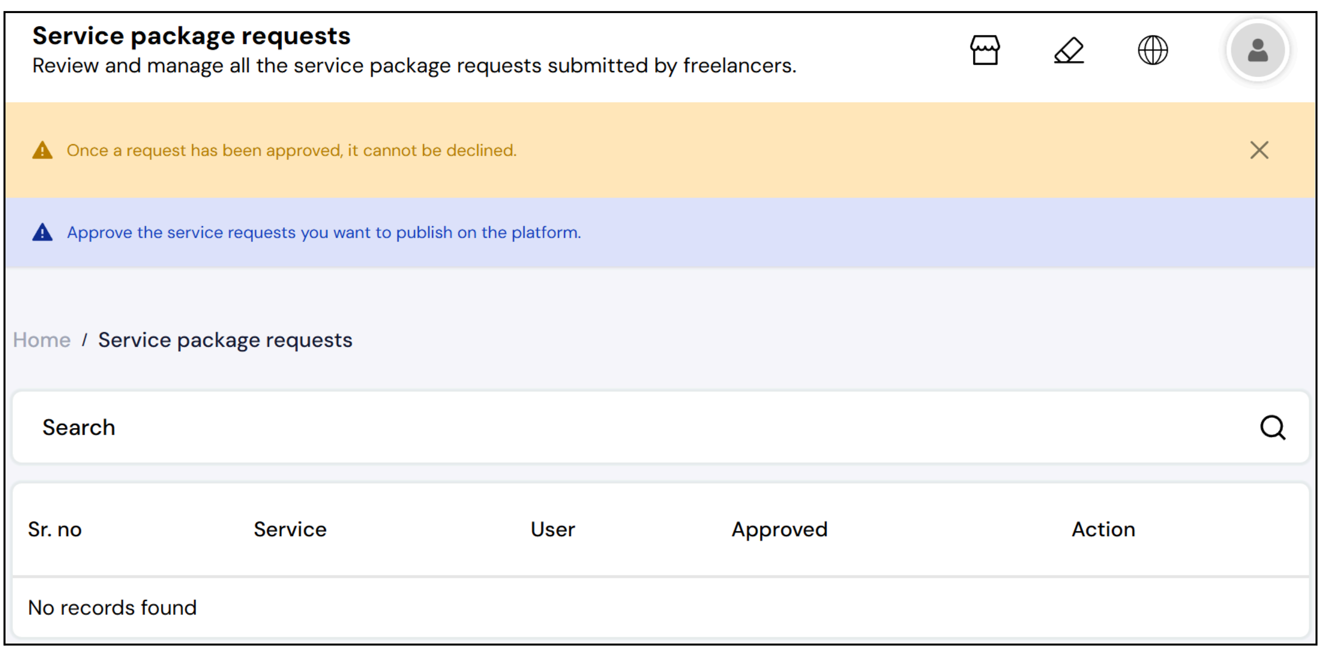
*Refer to the **Admin manual** to learn more about all the features under this page.*

23.5 Service package requests

The next step involves setting up the service package requests.

The sub-module allows you to review and manage service packages submitted by freelancers. These packages are ready-to-go services that freelancers want to offer on the platform.

To manage the requests, go to **Ready-to-go service packages** > **Service package requests.**

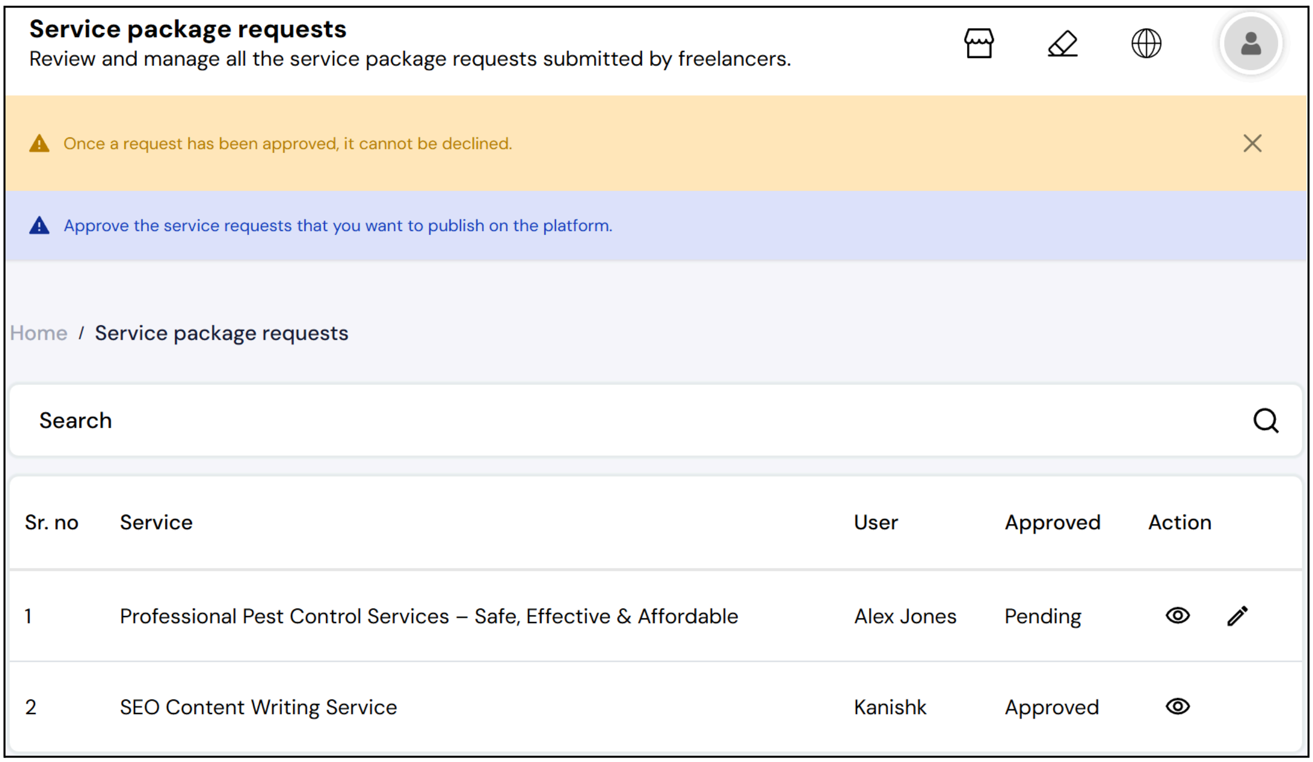


DISCLAIMER: The color theme and labels might differ in the screenshots as compared to on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Since no requests have been placed yet, the list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Kindly note that even minor edits made by the freelancer to the service package will require admin approval before being published on the platform.

*Manage the admin approval for service packages under **Settings > System configurations > Common settings tab >** [Service package approval settings](#).*



Once a request is placed by a freelancer, it will appear in the records.

To manage the requests placed, two action buttons are available beside each pending package request, while only the View button is available for approved requests.

Click **view button** next to a package to see its related information.

To change the status of a package, click the **edit button** next to it.

This will open the Update Status form.

Update the following:

- **Status***: Set the status of the package request.
    - **Approved:** Select this option to approve the request and publish the package on the platform.
    - **Rejected:** Select this option to decline the request, preventing the package from being published.
    - **Canceled:** Select this option to revoke the request if it is no longer required.

Once done, click **Update.**

The form will automatically close and the package status will be updated accordingly.

Follow the same process to set the status for package requests submitted by freelancers.

*Refer to the **Admin manual** to learn more about all the features under this page.*

You are set to begin!

These initial steps will help you set up the platform roughly and make it live.

However, you are still required to configure all the **Settings** & manage all the modules to set up the platform completely.

Refer to the **Admin manual** to know more!

x——x

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

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