



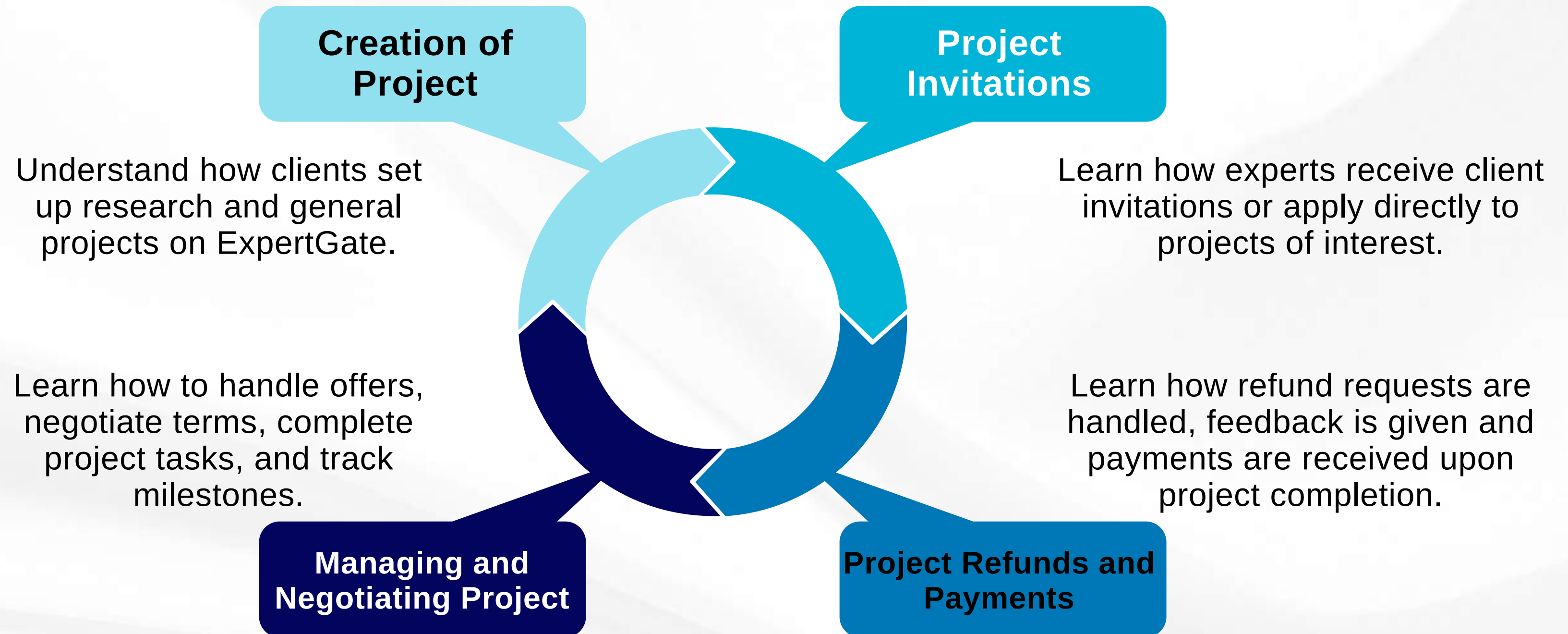
## **Webinar Series 4:**

# **How Project Management System Works?**

# Acknowledgement of Country

ExpertGate acknowledges the traditional custodians of the land on which we meet today and pay my respects to Elders past, present and emerging. We pay respect to the peoples of the Darug, Tharawal, Eora and Wiradjuri nations who are the Traditional Custodians of this Land.

# What We Will Cover Today?



# What are Projects?

**Projects** on ExpertGate are collaborative opportunities where experts and clients work together in various fields such as Agriculture, Healthcare, Education, and more. These projects can be research-focused or general in nature.

Clients can either invite experts to submit expressions of interest (EOIs) or allow experts to find and apply for them. Once selected, experts negotiate terms, complete the project, and receive payment.

# Why Do Experts Engage with Projects on ExpertGate?

**Expand Your Network:** Engage with clients globally, expanding your professional reach and network.

**Streamlined Workflow:** Enjoy easy project management from proposal submission to payment processing.

**Control Over Projects:** Choose from a variety of projects, research or general, that match your expertise.

**Flexible Engagements:** Set your own terms and negotiate for optimal conditions.

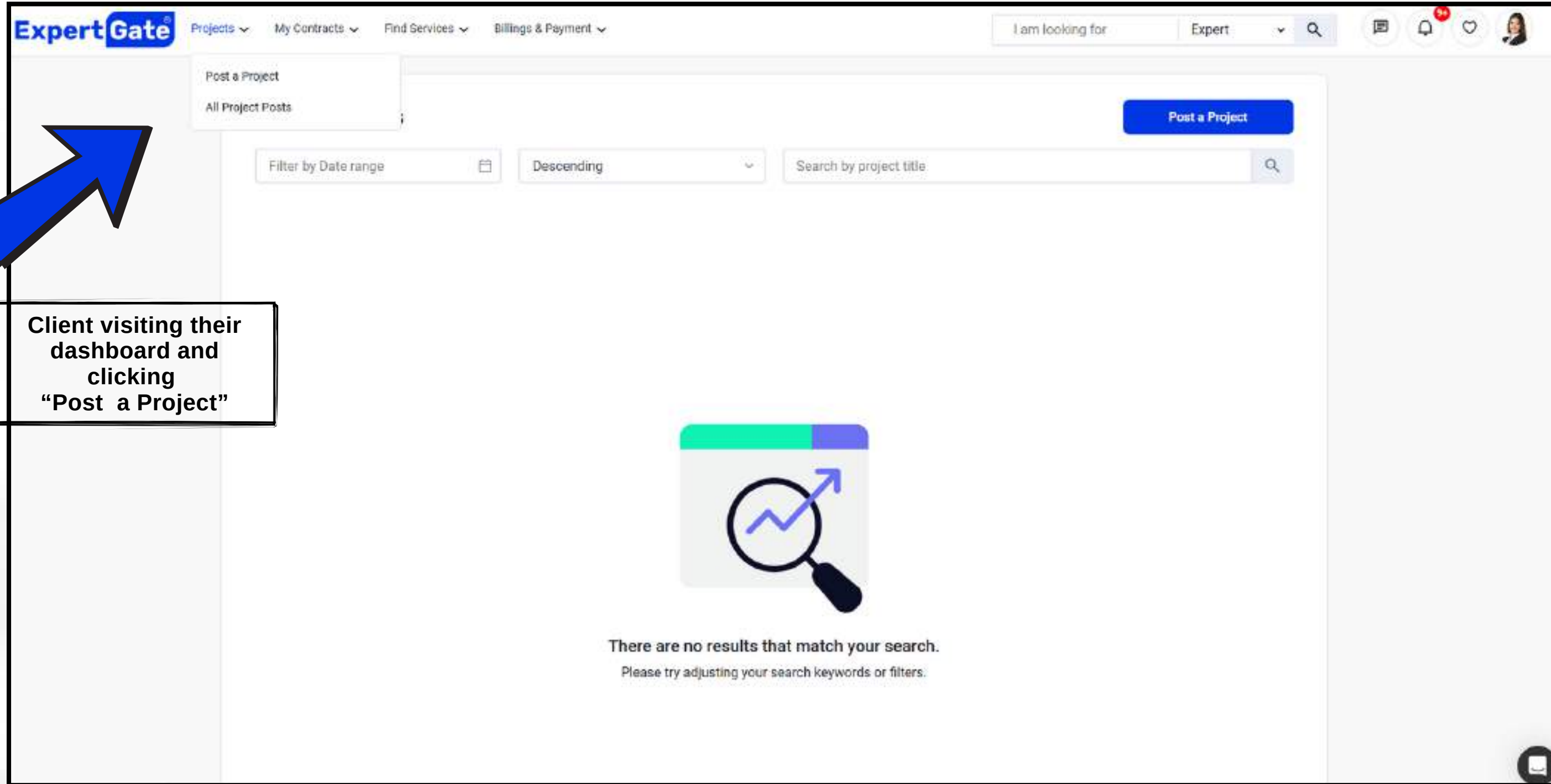
**Automated Payments:** Effortless, secure payments are processed automatically once the project is complete.

**Social Impact:** Contribution to educational initiatives, with 50% of profits reinvested into empowering underprivileged communities.



# How are projects created on ExpertGate?

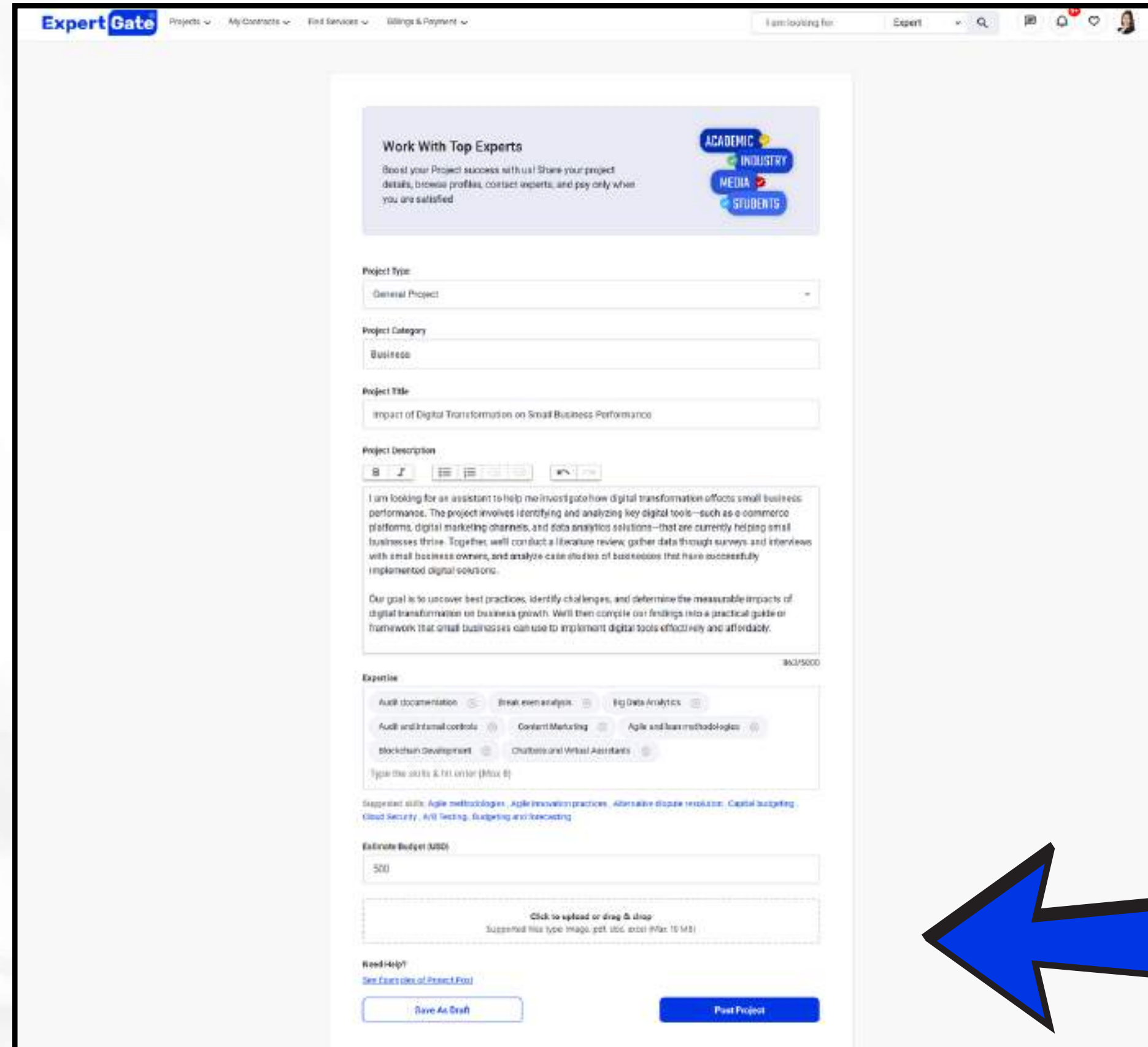
# Client posting a project



The screenshot shows the ExpertGate dashboard. At the top, there are navigation tabs: 'Projects', 'My Contracts', 'Find Services', and 'Billings & Payment'. A search bar on the right contains the text 'I am looking for Expert'. Below the navigation, there is a dropdown menu with 'Post a Project' selected. A blue arrow points to this dropdown menu. To the right of the dropdown is a blue button labeled 'Post a Project'. Below these elements are filters: 'Filter by Date range', 'Descending', and 'Search by project title'. The main content area is empty, displaying a magnifying glass icon over a line graph and the text: 'There are no results that match your search. Please try adjusting your search keywords or filters.'

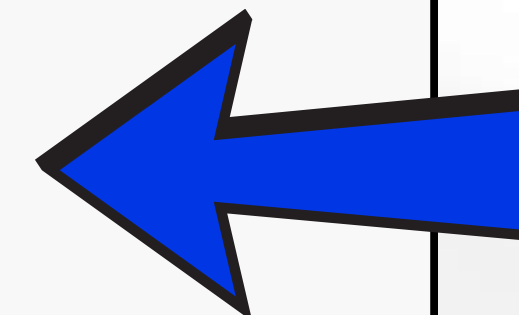
Client visiting their dashboard and clicking "Post a Project"

# Client Entering Project Details



The screenshot shows the 'Expert Gate' project details form. The form includes the following sections:

- Work With Top Experts:** A header section with a sub-header and a list of categories: ACADEMIC, INDUSTRY, MEDIA, and STUDENTS.
- Project Type:** A dropdown menu with 'General Project' selected.
- Project Category:** A text input field containing 'Business'.
- Project Title:** A text input field containing 'Impact of Digital Transformation on Small Business Performance'.
- Project Description:** A rich text editor containing a detailed description of the project, including a goal to uncover best practices and identify challenges.
- Expertise:** A section with several tags: Audit documentation, Break even analysis, Big Data Analytics, Audit and Internal controls, Content Marketing, Agile and lean methodologies, Blockchain Development, and Chatbots and Virtual Assistants.
- Estimate Budget (USD):** A text input field containing '500'.
- File Upload:** A dashed box for uploading files, with a note: 'Click to upload or drag & drop. Supported file types: image, pdf, doc, excel (Max 10 MB)'.
- Buttons:** 'Save As Draft' and 'Post Project' buttons at the bottom.



Enter project details and post the project





# Project is live on ExpertGate

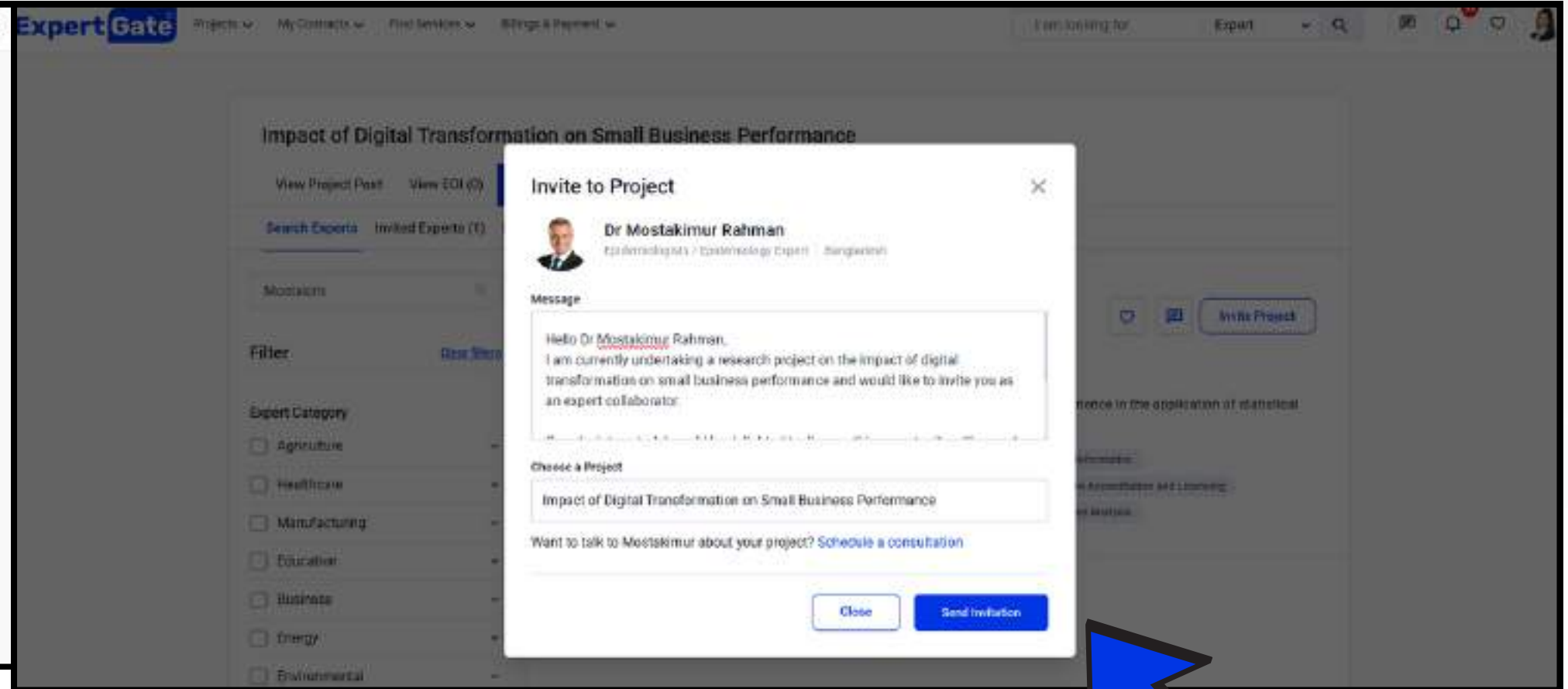
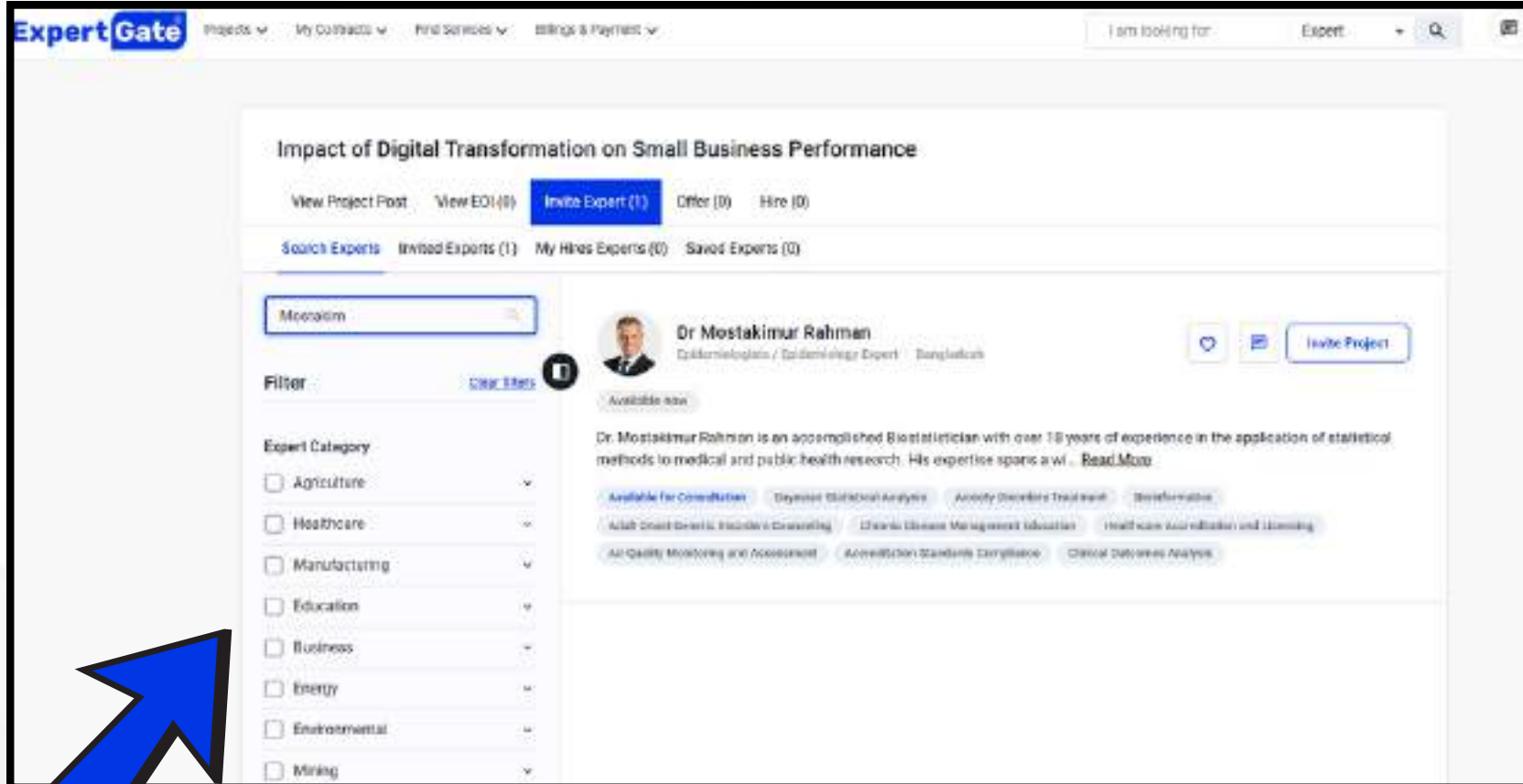
The screenshot shows the ExpertGate website interface. At the top, there is a navigation bar with the ExpertGate logo and menu items: Projects, My Contracts, Find Services, and Billings & Payment. A search bar on the right contains the text 'I am looking for' and a dropdown menu set to 'Expert'. Below the navigation bar, the main content area features a project titled 'Impact of Digital Transformation on Small Business Performance'. A blue arrow points to the 'View Project Post' button. To the right of this button are links for 'View EOI (0)', 'Invite Expert (0)', 'Offer (0)', and 'Hire (0)'. The project details include a timestamp of '2 seconds ago', a 'Business' category, and a fixed price of '\$500.00'. The project description states: 'I am looking for an assistant to help me investigate how digital transformation affects small business performance. The project involves identifying and analyzing key digital tools—such as e-commerce platforms, digital marketing channels, and data analytics solutions—that are currently helping small businesses thrive. Together, we'll conduct a literature review, gather data through surveys and interviews with small business owners, and analyze case studies of businesses that have successfully implemented digital solutions. Our goal is to uncover best practices, identify challenges, and determine the measurable impacts of digital transformation on business growth. We'll then compile our findings into a practical guide or framework that small businesses can use to implement digital tools effectively and affordably.' The 'Required Skills' section lists: Audit documentation, Break even analysis, Big Data Analytics, Audit and internal controls, Content Marketing, Agile and lean methodologies, Blockchain Development, and Chatbots and Virtual Assistants. The 'About the client' section identifies Mrs. Jose Levya, an institution named ABC Corporation, located in Bangladesh, with a posting time of 10:41am UTC+06:00 and 1 project posted with a 0.00% hire rate and 1 open project. At the bottom of the page, there is a 'Was This Page Useful?' section with 'Yes' and 'No' buttons, a 'Provide Feedback' button, and a chat icon.



**How Experts are invited to collaborate on projects?**



# Invite Expert to submit EOI

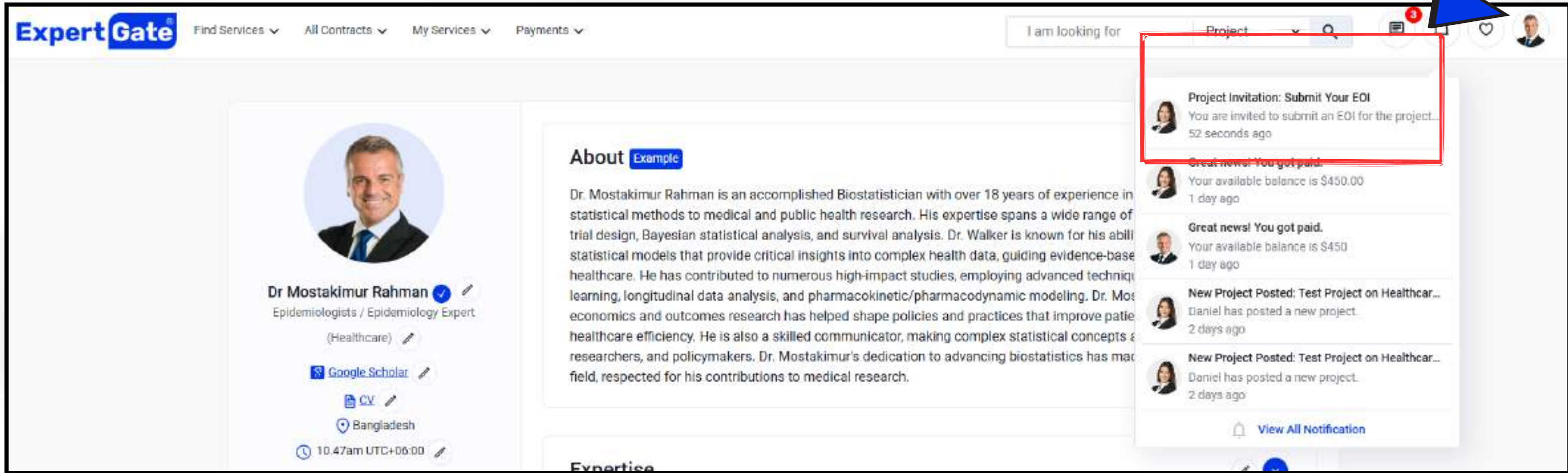


After project is posted,  
Clients can invite  
experts of their choice  
by searching.

Client inviting the expert  
by sending them a  
message about project  
collaboration proposal

# Invitation sent to Expert

Expert received project invite



The screenshot shows the ExpertGate profile page for Dr. Mostakimur Rahman. The profile includes a profile picture, name, title 'Epidemiologists / Epidemiology Expert', location 'Bangladesh', and a bio. A notification overlay is visible in the top right corner, containing the following text:

- Project Invitation: Submit Your EOI**  
You are invited to submit an EOI for the project...  
52 seconds ago
- Great news! You got paid.**  
Your available balance is \$450.00  
1 day ago
- Great news! You got paid.**  
Your available balance is \$450  
1 day ago
- New Project Posted: Test Project on Healthcar...**  
Daniel has posted a new project.  
2 days ago
- New Project Posted: Test Project on Healthcar...**  
Daniel has posted a new project.  
2 days ago

A red box highlights the first notification, and a blue arrow points from the text box above to it. The notification also includes a 'View All Notification' link at the bottom.

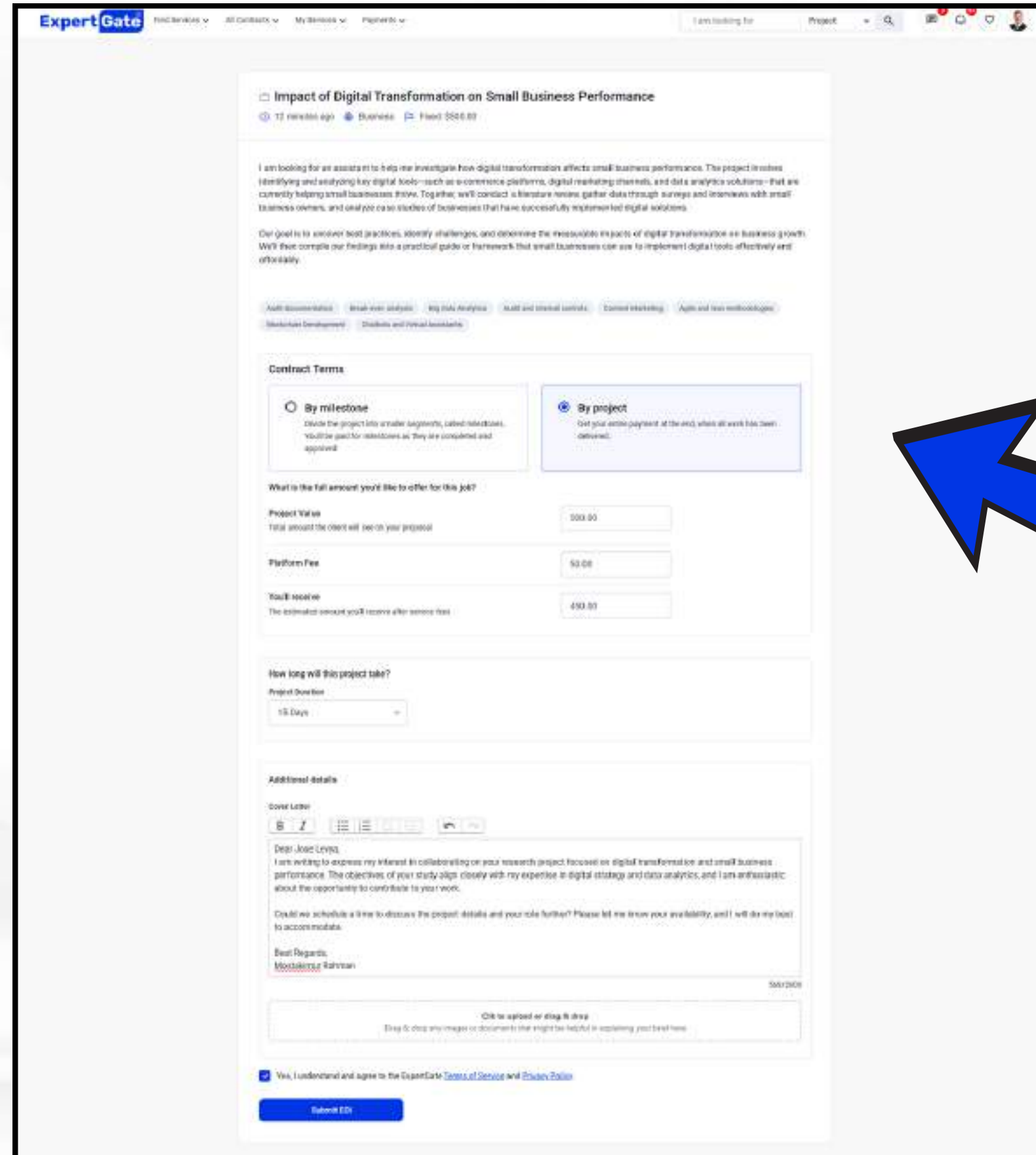


# Expert received project invite

The screenshot shows a project invite on the ExpertGate platform. The main project is titled "Impact of Digital Transformation on Small Business Performance" and is posted 10 minutes ago. The project description states: "I am looking for an assistant to help me investigate how digital transformation affects small business performance. The project involves identifying and analyzing key digital tools—such as e-commerce platforms, digital marketing channels, and data analytics solutions—that are currently helping small businesses thrive. Together, we'll conduct a literature review, gather data through surveys and interviews with small business owners, and analyze case studies of businesses that have successfully implemented digital solutions. Our goal is to uncover best practices, identify challenges, and determine the measurable impacts of digital transformation on business growth. We'll then compile our findings into a practical guide or framework that small businesses can use to implement digital tools effectively and affordably." The "Required Skills" section lists: "Audit documentation", "Break down analysis", "Big Data Analytics", "Audit and internal controls", "Contract Workstage", "Agile and lean methodologies", "Blockchain development", and "Chatbots and Virtual Assistants". The offer amount is \$500.00. The client information is: Mrs. Jose Levis, Institution ABC Corporation, Bangladesh, 10:55am UTC+06:00, 1 project posted, 0.00% hire rate, 1 open projects. A red box highlights the "Accept", "Decline", and "Chat with Client" buttons. A blue arrow points from the text box on the right to this red box.

Expert can either accept or reject the offer, or negotiate terms before accepting the offer

# Expert accepted the project invite



**ExpertGate** PROJECTS ALL OFFERS MY OFFERS PROJECTS

I am looking for an assistant to help me investigate how digital transformation affects small business performance. The project involves identifying and analyzing key digital tools—such as e-commerce platforms, digital marketing strategies, and data analytics solutions—that are currently helping small businesses thrive. Together, we'll conduct a literature review, gather data through surveys and interviews with small business owners, and analyze case studies of businesses that have successfully implemented digital solutions.

Our goal is to uncover best practices, identify challenges, and determine the measurable impacts of digital transformation on business growth. We'll then compile our findings into a practical guide or framework that small businesses can use to implement digital tools effectively and affordably.

[Add documentation](#) [Break down analysis](#) [Big data analysis](#) [Audit and internal controls](#) [Content marketing](#) [Applied lean methodologies](#)  
[Statistical Development](#) [Database and report building](#)

### Contract Terms

By milestone  
Divide the project into smaller segments, called milestones. You'll be paid for milestones as they are completed and approved.

By project  
Get your entire payment at the end, when all work has been delivered.

What is the full amount you'd like to offer for this job?

Project Value Total amount the client will pay on your proposal	<input type="text" value="500.00"/>
Platform Fee	<input type="text" value="50.00"/>
You'll receive The estimated amount you'll receive after agency fees	<input type="text" value="450.00"/>

How long will this project take?

Project Duration

### Additional Details

Cover Letter

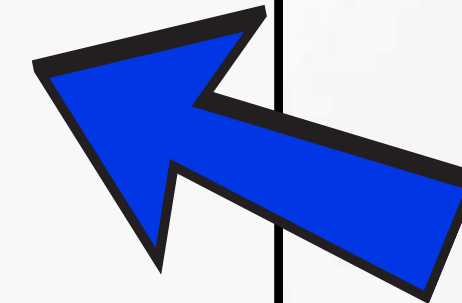
Dear Jose Leiva,  
I am writing to express my interest in collaborating on your research project focused on digital transformation and small business performance. The objectives of your study align closely with my expertise in digital strategy and data analytics, and I am enthusiastic about the opportunity to contribute to your work.

Could we schedule a time to discuss the project details and your role further? Please let me know your availability, and I will do my best to accommodate.

Best Regards,  
Mostafizur Rahman

I'm ready to apply or skip it later  
They'll also see any images or documents that might be helpful in explaining your brief here.

Yes, I understand and agree to the ExpertGate [Terms of Service](#) and [Privacy Policy](#)

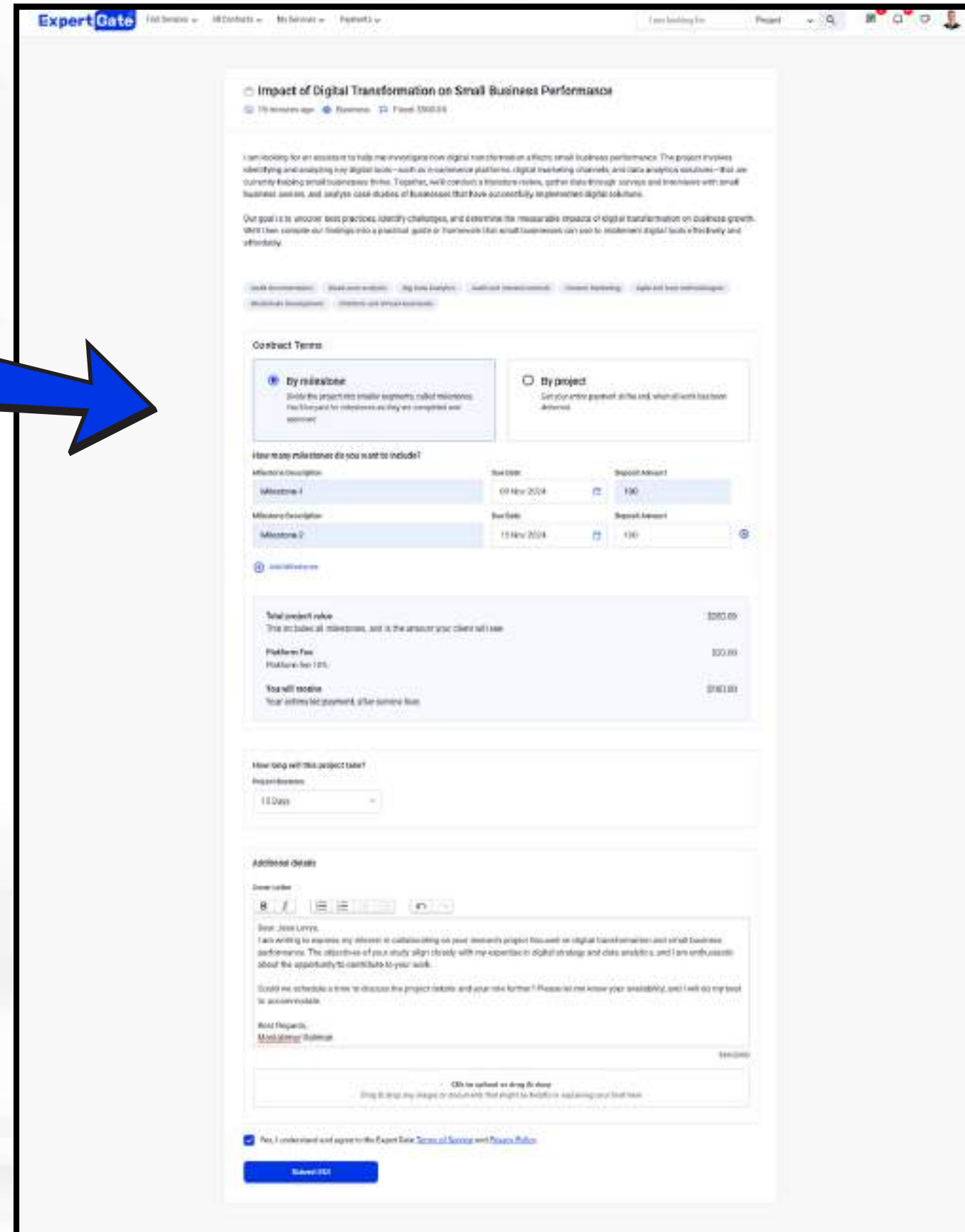
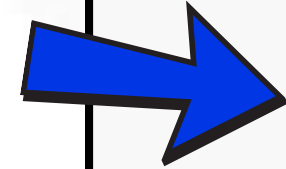


Expert after accepting the offer should set up contract terms

Either choose a one time project fee or divide into multiple milestones, depending on the agreement with the client.

# Expert accepted the project invite

Propose multiple milestones for a fixed project fee

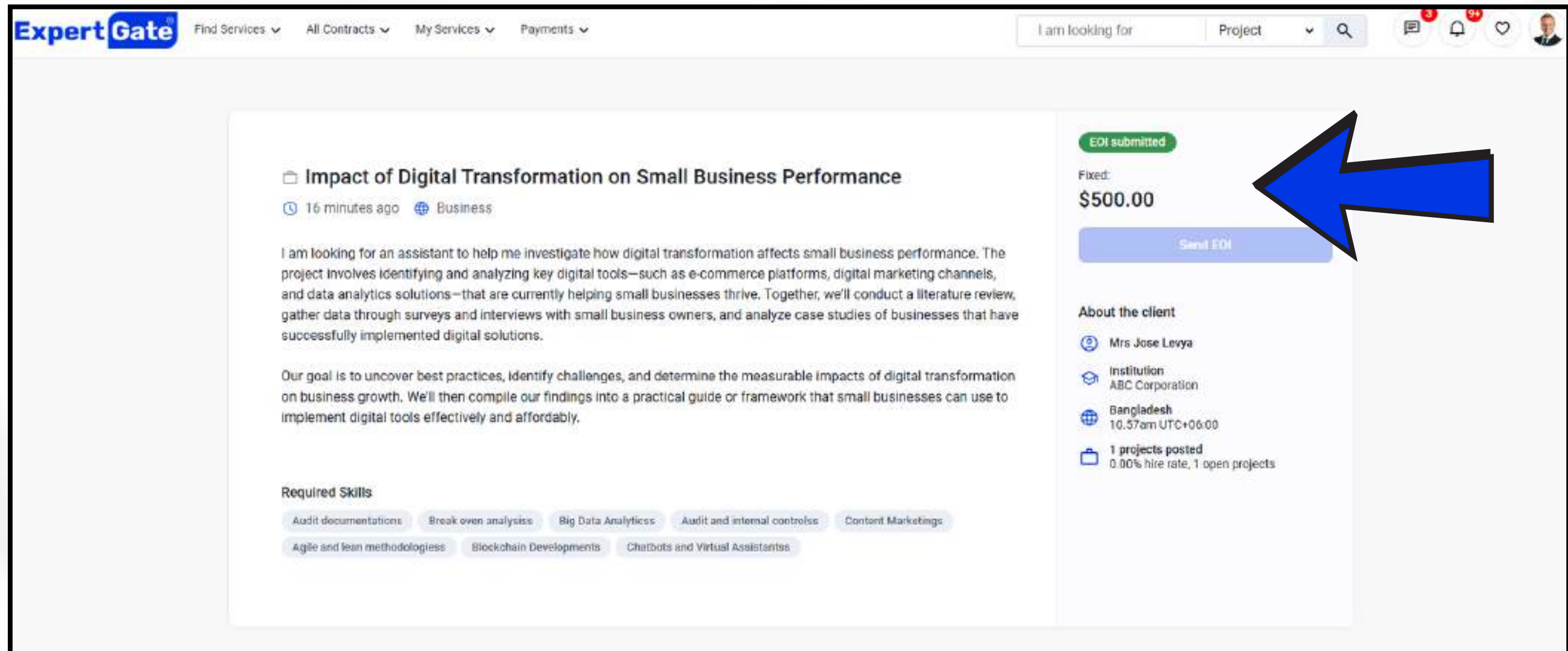


The screenshot shows a project proposal form on the ExpertGate platform. The project title is "Impact of Digital Transformation on Small Business Performance". The proposal is for a fixed fee of \$200.00. The contract terms are set to "By milestone". The milestones are:

Milestone Description	Due Date	Deposit Amount
Milestone 1	01 Nov 2024	100
Milestone 2	15 Nov 2024	100

The total project value is \$200.00, and the platform fee is \$20.00. The total amount to be received is \$180.00. The project is estimated to take 15 days. The proposal is submitted by an expert named John LYNN.

# Expert submitted an Expression of Interest (EOI)



The screenshot displays the Expert Gate interface. At the top, there is a navigation bar with the Expert Gate logo and menu items: Find Services, All Contracts, My Services, and Payments. A search bar on the right contains the text 'I am looking for' and a dropdown menu set to 'Project'. The main content area features a project listing for 'Impact of Digital Transformation on Small Business Performance', posted 16 minutes ago in the Business category. The project description states: 'I am looking for an assistant to help me investigate how digital transformation affects small business performance. The project involves identifying and analyzing key digital tools—such as e-commerce platforms, digital marketing channels, and data analytics solutions—that are currently helping small businesses thrive. Together, we'll conduct a literature review, gather data through surveys and interviews with small business owners, and analyze case studies of businesses that have successfully implemented digital solutions. Our goal is to uncover best practices, identify challenges, and determine the measurable impacts of digital transformation on business growth. We'll then compile our findings into a practical guide or framework that small businesses can use to implement digital tools effectively and affordably.' Below the description, a 'Required Skills' section lists various skills such as 'Audit documentations', 'Break even analysis', 'Big Data Analytics', 'Audit and internal controls', 'Content Marketings', 'Agile and lean methodologies', 'Blockchain Developments', and 'Chatbots and Virtual Assistantss'. On the right side of the project listing, there is a green badge that says 'EOI submitted', a fixed price of '\$500.00', and a blue button labeled 'Send EOI'. A large blue arrow points to this button. Below the button, the 'About the client' section provides details: 'Mrs Jose Levya', 'Institution ABC Corporation', 'Bangladesh', '10:57am UTC+06:00', and '1 projects posted, 0.00% hire rate, 1 open projects'.



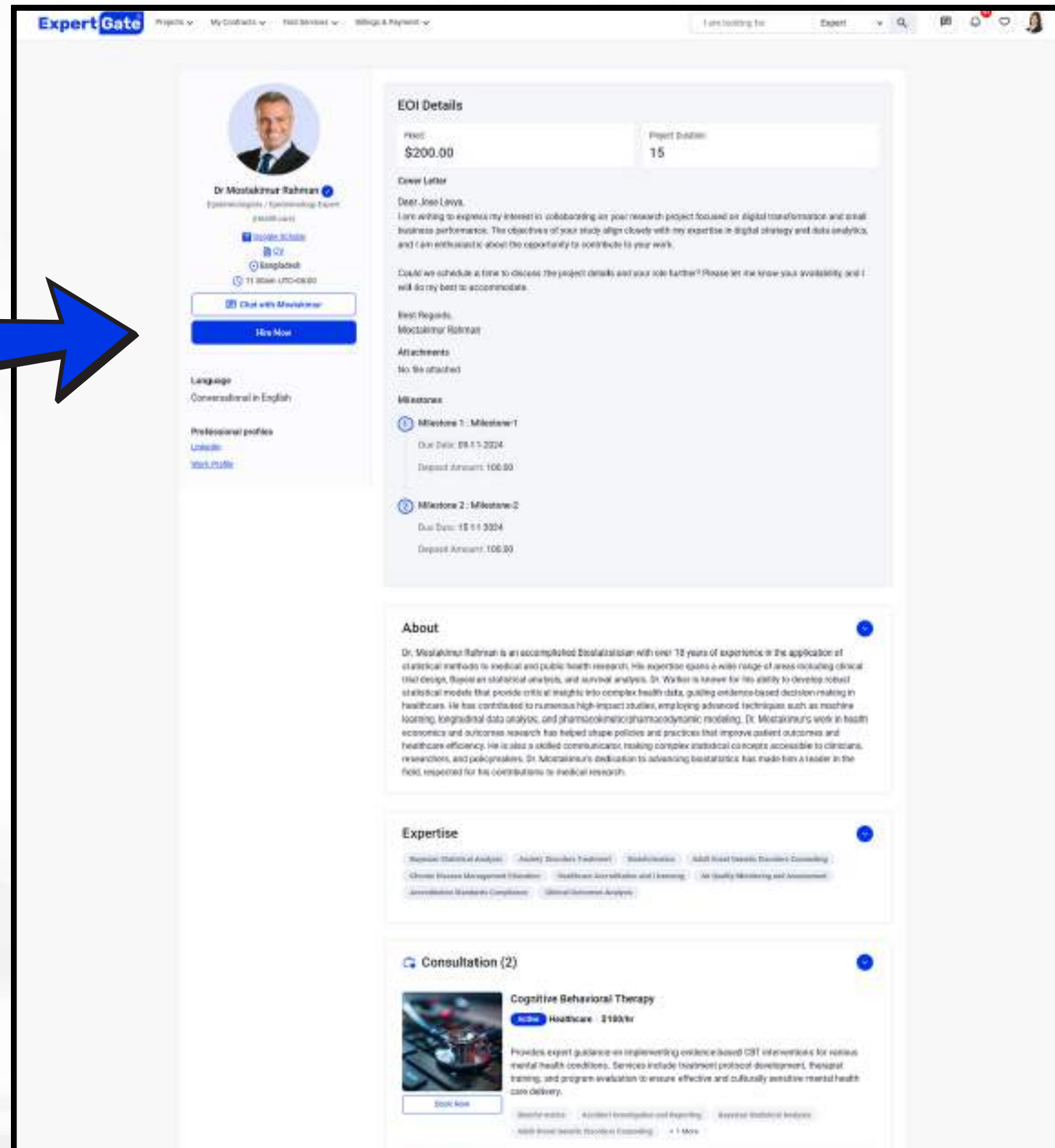
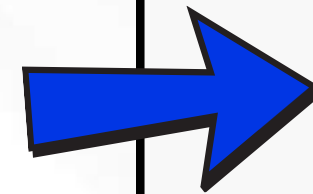
# Client received Expert's EOI

The screenshot shows the ExpertGate interface. At the top, there are navigation tabs: Projects, My Contracts, Find Services, and Billings & Payment. The user profile 'Mostakim' is visible in the top right. The main content area displays a project titled 'Impact of Digital Transformation on Small Business Performance'. Below the title are buttons for 'View Project Post', 'View EOI (1)', 'Invite Expert (1)', 'Offer (0)', and 'Hire (0)'. There are also filters for 'All Proposals (1)', 'Short listed (0)', 'Messaged (0)', and 'Archived (0)'. A search bar for 'Search by expert name' is present. The profile of 'Dr Mostakimur Rahman' is shown, including his title 'Epidemiologists / Epidemiology Expert | Bangladesh', availability status 'Available now', and a bio. Below the bio are various service tags. A notification dropdown menu is open on the right, with the top notification 'New EOI Submitted' highlighted in a red box. A blue arrow points from a text box on the right towards this notification.

Client received notification for expert submitted EOI

# Client hires the expert

Client views the submitted EOI and then can hire the expert



**Expert Gate** Projects My Contracts My Services Billing & Payment I am looking for Expert

**Dr. Mostakimur Rahman**  
Epidemiologist / Epidemiology Expert  
j.mostakimur@expertgate.com  
+8801711000000  
+8801711000000  
Chat with Mostakimur  
Hire Now

Language  
Conversational in English

Professional profile  
LinkedIn  
Work Profile

### EOI Details

Price: \$200.00 Project duration: 15

#### Cover Letter

Dear, Joe Laws,  
I am writing to express my interest in collaborating on your research project focused on digital transformation and overall business performance. The objectives of your study align closely with my expertise in digital strategy and data analytics, and I am enthusiastic about the opportunity to contribute to your work.

Could we schedule a time to discuss the project details and your role further? Please let me know your availability and I will do my best to accommodate.

Best Regards,  
Mostakimur Rahman

Attachments  
No file attached

#### Milestones

- Milestone 1 - Milestone 1  
Due Date: 09-11-2024  
Deposit Amount: 100.00
- Milestone 2 - Milestone 2  
Due Date: 10-11-2024  
Deposit Amount: 100.00

#### About

Dr. Mostakimur Rahman is an accomplished Biostatistician with over 15 years of experience in the application of statistical methods in medical and public health research. His expertise spans a wide range of areas including clinical trial design, Bayesian statistical analysis, and survival analysis. Dr. Rahman is known for his ability to develop robust statistical models that provide critical insights into complex health data, guiding evidence-based decision-making in healthcare. He has contributed to numerous high-impact studies, employing advanced techniques such as machine learning, longitudinal data analysis, and pharmacokinetic/pharmacodynamic modeling. Dr. Mostakimur's work in health economics and outcomes research has helped shape policies and practices that improve patient outcomes and healthcare efficiency. He is also a skilled communicator, making complex statistical concepts accessible to clinicians, researchers, and policymakers. Dr. Mostakimur's dedication to advancing biostatistics has made him a leader in the field, respected for his contributions to medical research.

#### Expertise

- Bayesian Statistical Analysis
- Academy Director's Training
- Statistical Analysis
- Adult Heart Disease Diagnosis Consulting
- Chronic Disease Management Evaluation
- Healthcare Innovation and Learning
- AI Quality Monitoring and Assessment
- Administrative Statistics Compliance
- Global Healthcare Analysis

#### Consultation (2)

**Cognitive Behavioral Therapy**  
Healthcare - \$100/hr

Provides expert guidance on implementing evidence-based CBT interventions for various mental health conditions. Services include treatment protocol development, therapist training, and program evaluation to ensure effective and culturally sensitive mental health care delivery.

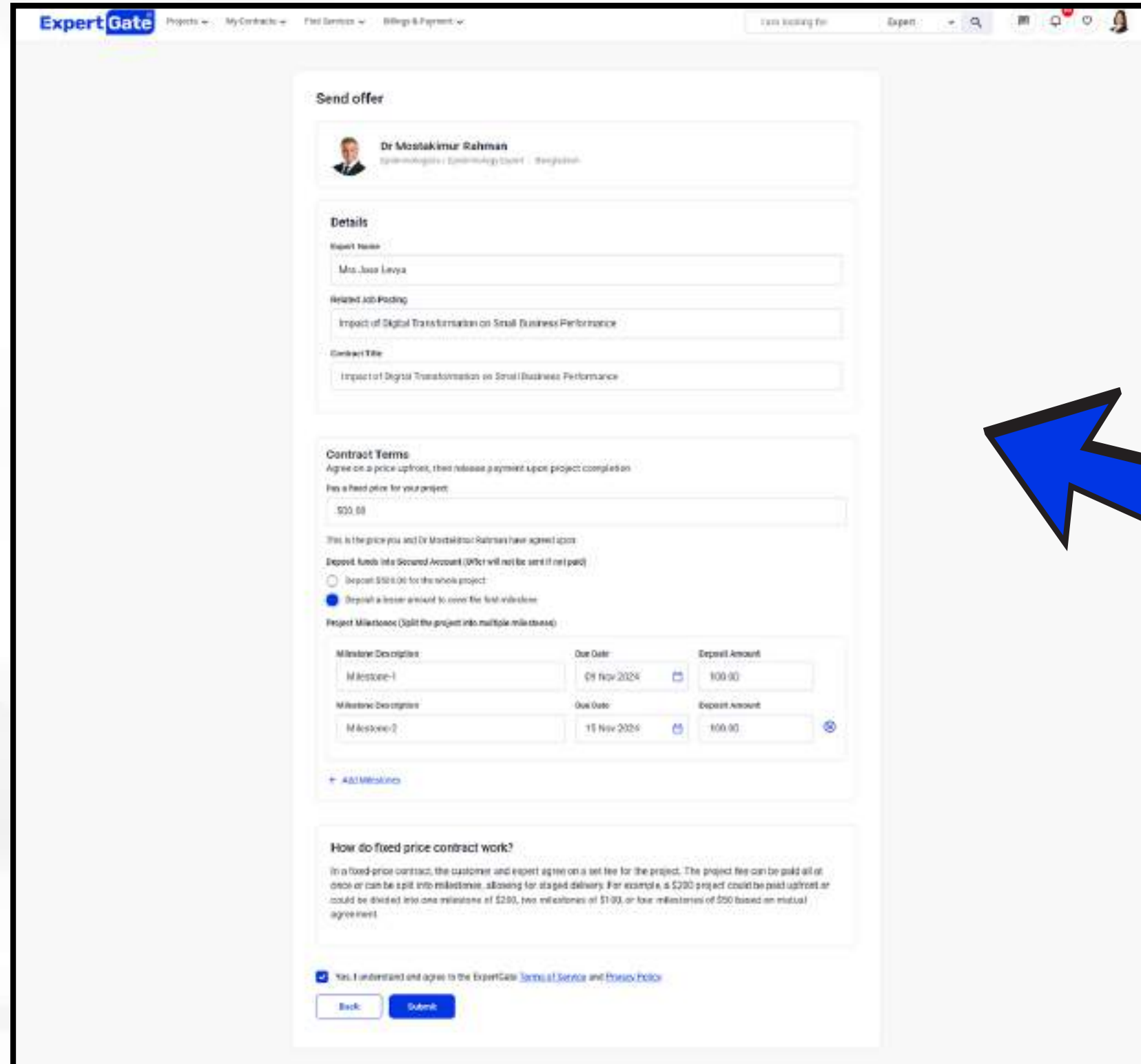
Book Now

Specialties: Academic Knowledge and Reporting, Research Statistical Analysis, Adult Heart Disease Diagnosis Consulting, + 1 More



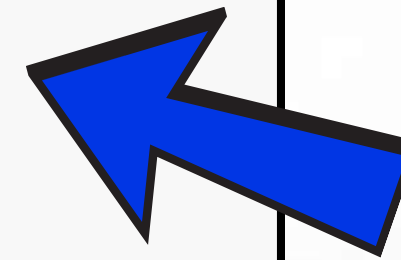
**How to manage and negotiate the projects?**

# Client sends the offer to the expert



The screenshot shows the 'Send offer' form in the Expert Gate interface. The form is for an expert named Dr. Mostakimur Rahman. It includes fields for the expert's name, related job posting, and contract title. The 'Contract Terms' section is set to 'Fixed price' with a value of \$200.00. The payment method is 'Deposit a lesser amount to cover the first milestone', and the project is split into two milestones: 'Milestone-1' (due 09 Nov 2024, \$100.00) and 'Milestone-2' (due 18 Nov 2024, \$100.00). A 'Submit' button is visible at the bottom.

Milestone Description	Due Date	Expert Amount
Milestone-1	09 Nov 2024	100.00
Milestone-2	18 Nov 2024	100.00



**Client hires the expert and set up agreed contract terms (one time or milestone based project)**

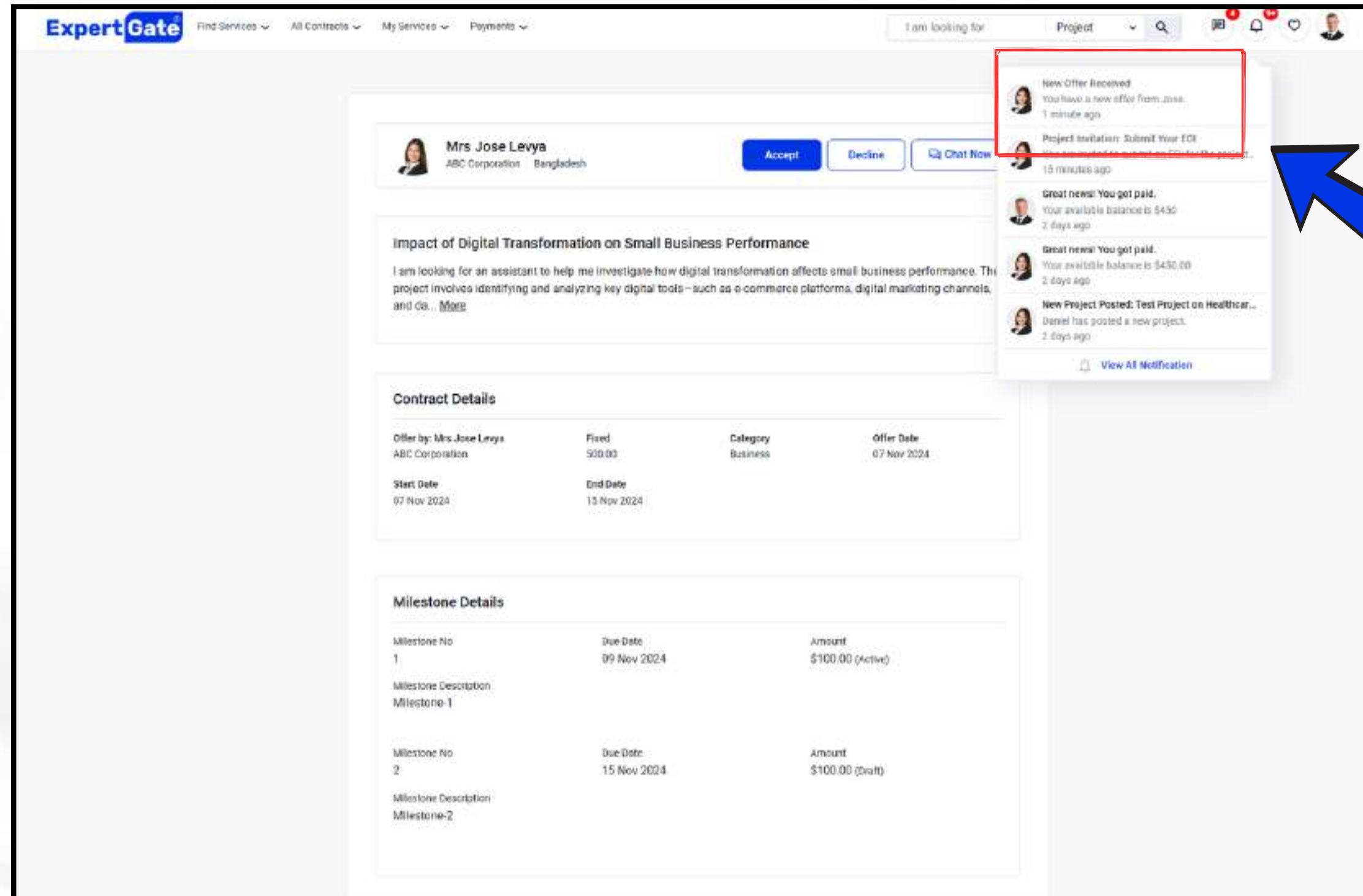


# Client funds the project and hire the expert

The screenshot shows the Expert Gate user interface. On the left, there is a 'Select a billing method' section with two options: 'ends with 5 Exp: 5/2036' and 'VISA ends with 77 Exp: 5/2036'. Below this is a '+ Add New Billing Method' button. On the right, there is a profile for 'Dr Mostakimur Rahman', an 'Epidemiologists / Epidemiology Expert' from Bangladesh. Below the profile is a project offer titled 'Impact of Digital Transformation on Small Business Performance' under 'Milestone-1'. A table lists the costs: Total Service Value 1 x \$100.00, Platform Fee (5%), Contract Initiation Fee, Subtotal, GST, and Transaction Fee (3.5%), leading to a Total Payable Amount of \$112.61. At the bottom right, there is a 'Fund Offer & Hire' button. A text box with an arrow points to this button, stating 'Client funds the project or the milestones in advance'.

Item	Amount
Total Service Value 1 x \$100.00	\$100.00
Platform Fee (5%)	\$5.00
Contract Initiation Fee	\$3.00
<b>Subtotal</b>	<b>\$108.00</b>
GST ⓘ	\$0.80
Transaction Fee (3.5%)	\$3.81
<b>Total Payable Amount:</b>	<b>\$112.61</b>

# Expert receives the offer



The screenshot displays the ExpertGate user interface. At the top, there is a navigation bar with the ExpertGate logo and menu items: Find Services, All Contracts, My Services, and Payments. A search bar contains the text "I am looking for" and "Project". A notification dropdown menu is open, showing several alerts. The first alert, "New Offer Received", is highlighted with a red box and a blue arrow pointing to it. The main content area shows a project offer from Mrs. Jose Levy, ABC Corporation, Bangladesh. The project title is "Impact of Digital Transformation on Small Business Performance". Below the project description, there are sections for "Contract Details" and "Milestone Details".

**Contract Details**

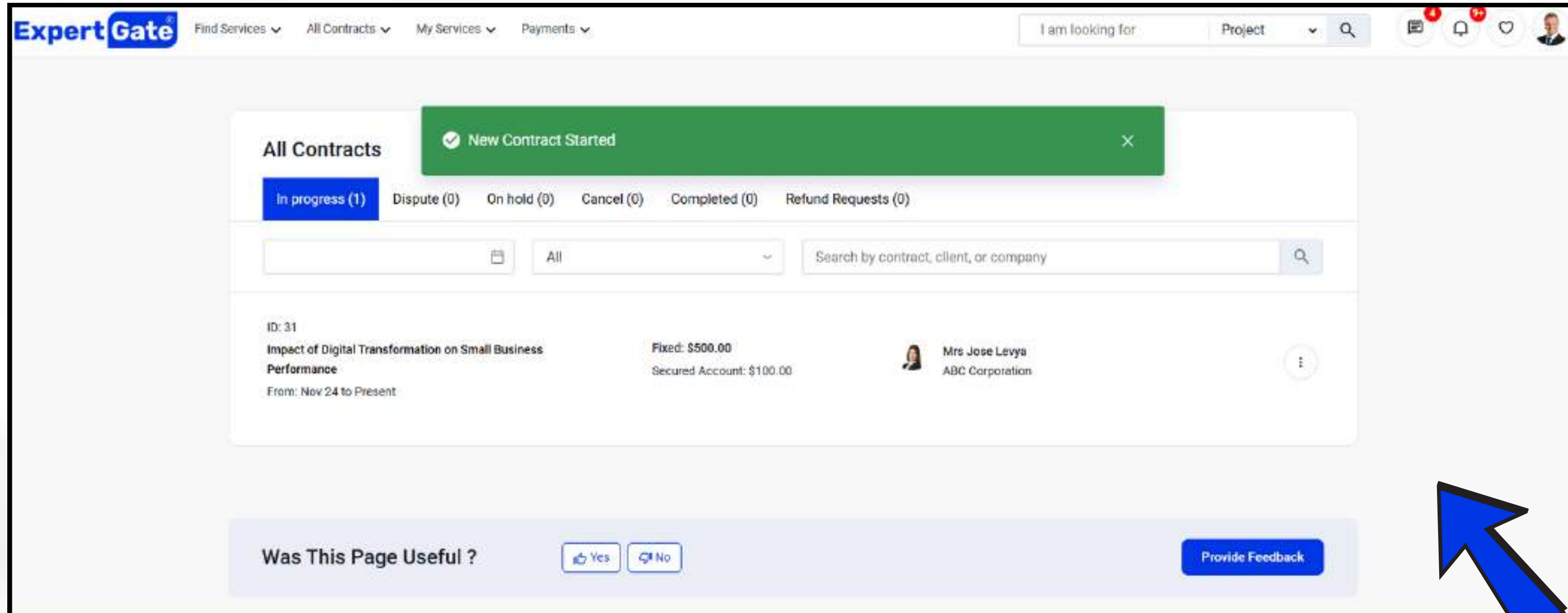
Offer by:	Fixed	Category	Offer Date
Mrs. Jose Levy ABC Corporation	500.00	Business	07 Nov 2024
Start Date	End Date		
07 Nov 2024	13 Nov 2024		

**Milestone Details**

Milestone No	Due Date	Amount
1	09 Nov 2024	\$100.00 (Active)
Milestone Description		
Milestone-1		
Milestone No	Due Date	Amount
2	15 Nov 2024	\$100.00 (Draft)
Milestone Description		
Milestone-2		

Expert receives the notification after client hires the experts and fund the project

# Expert accepts the offer



The screenshot shows the Expert Gate dashboard. At the top, there is a navigation bar with the Expert Gate logo and menu items: Find Services, All Contracts, My Services, and Payments. A search bar contains the text 'I am looking for' and a dropdown menu is set to 'Project'. In the main content area, a green notification banner at the top reads 'New Contract Started'. Below this, there are tabs for contract status: 'In progress (1)', 'Dispute (0)', 'On hold (0)', 'Cancel (0)', 'Completed (0)', and 'Refund Requests (0)'. A search bar is present with a dropdown menu set to 'All' and the text 'Search by contract, client, or company'. A single contract entry is displayed with the following details: ID: 31, Title: Impact of Digital Transformation on Small Business Performance, From: Nov 24 to Present, Fixed: \$500.00, Secured Account: \$100.00, and Client: Mrs Jose Levya, ABC Corporation. At the bottom of the dashboard, there is a feedback section with the text 'Was This Page Useful?' and buttons for 'Yes', 'No', and 'Provide Feedback'. A large blue arrow points from the bottom right towards the contract entry.

Expert accepts the offer and the contract is then initiated.



# Expert to submit project deliverable

The screenshot shows the Expert Gate interface for a project. At the top, there are navigation tabs: Find Services, All Contracts, My Services, and Payments. A search bar contains 'I am looking for Project'. The project title is 'Impact of Digital Transformation on Small Business Performance' by Mrs Jose Levy from ABC Corporation. Below the title are tabs for Overview, Messages, and Details. A summary table shows financial details:

Project Price	In Secured Account	Milestones paid (1)	Milestones Remaining (1)	Total Earnings
\$500.00	\$100.00	\$100.00	\$100.00	\$0

Below the table is a 'Milestone Timeline' section. It shows two milestones:

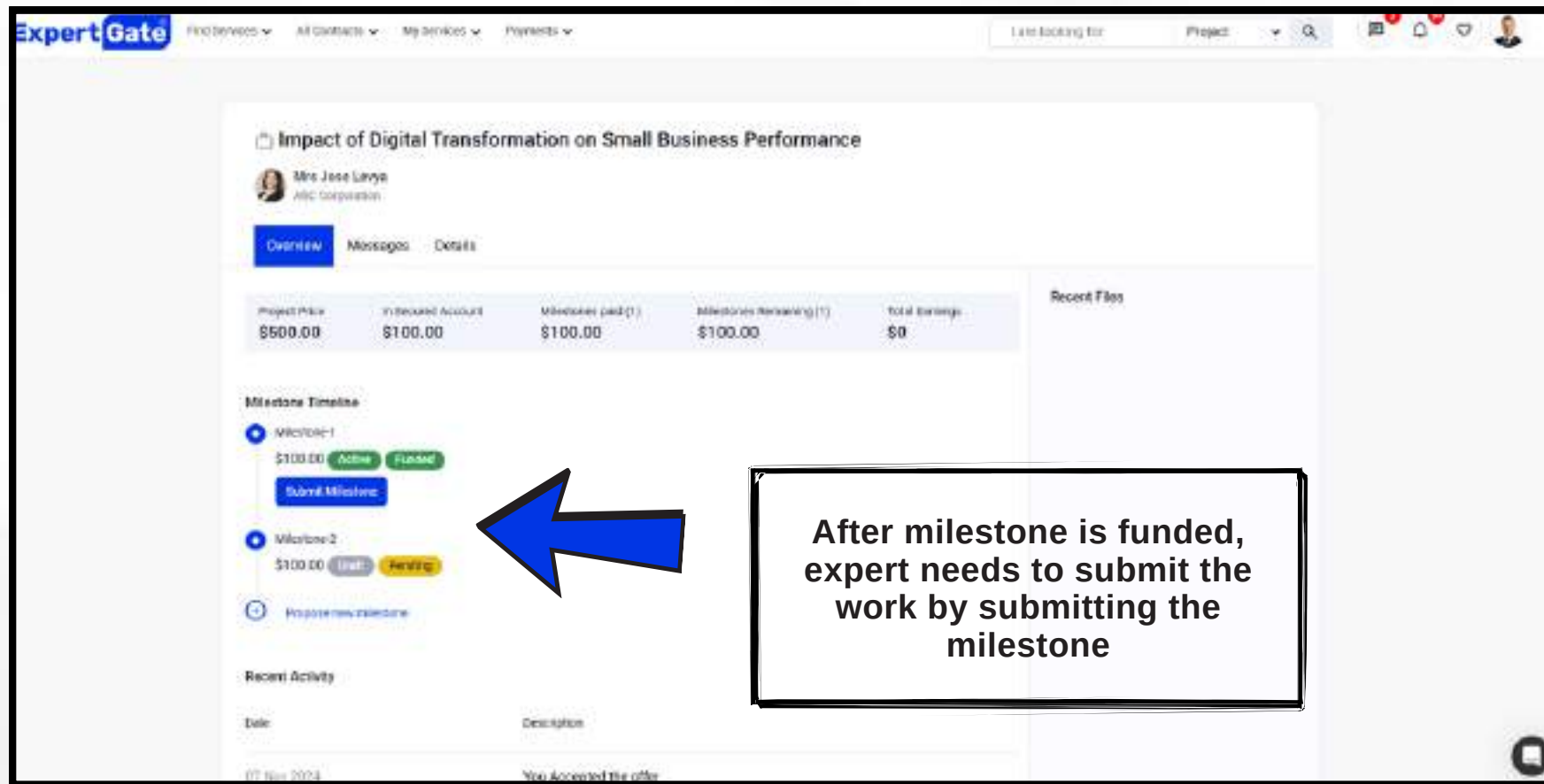
- Milestone-1: \$100.00, with 'Active' and 'Funded' status indicators, and a 'Submit Milestone' button.
- Milestone-2: \$100.00, with 'Draft' and 'Pending' status indicators.

A blue arrow points from a text box to the 'Submit Milestone' button. The text box contains the instruction: 'After milestone is funded, expert needs to submit the work by submitting the milestone'. Below the timeline is a 'Recent Activity' section with a table:

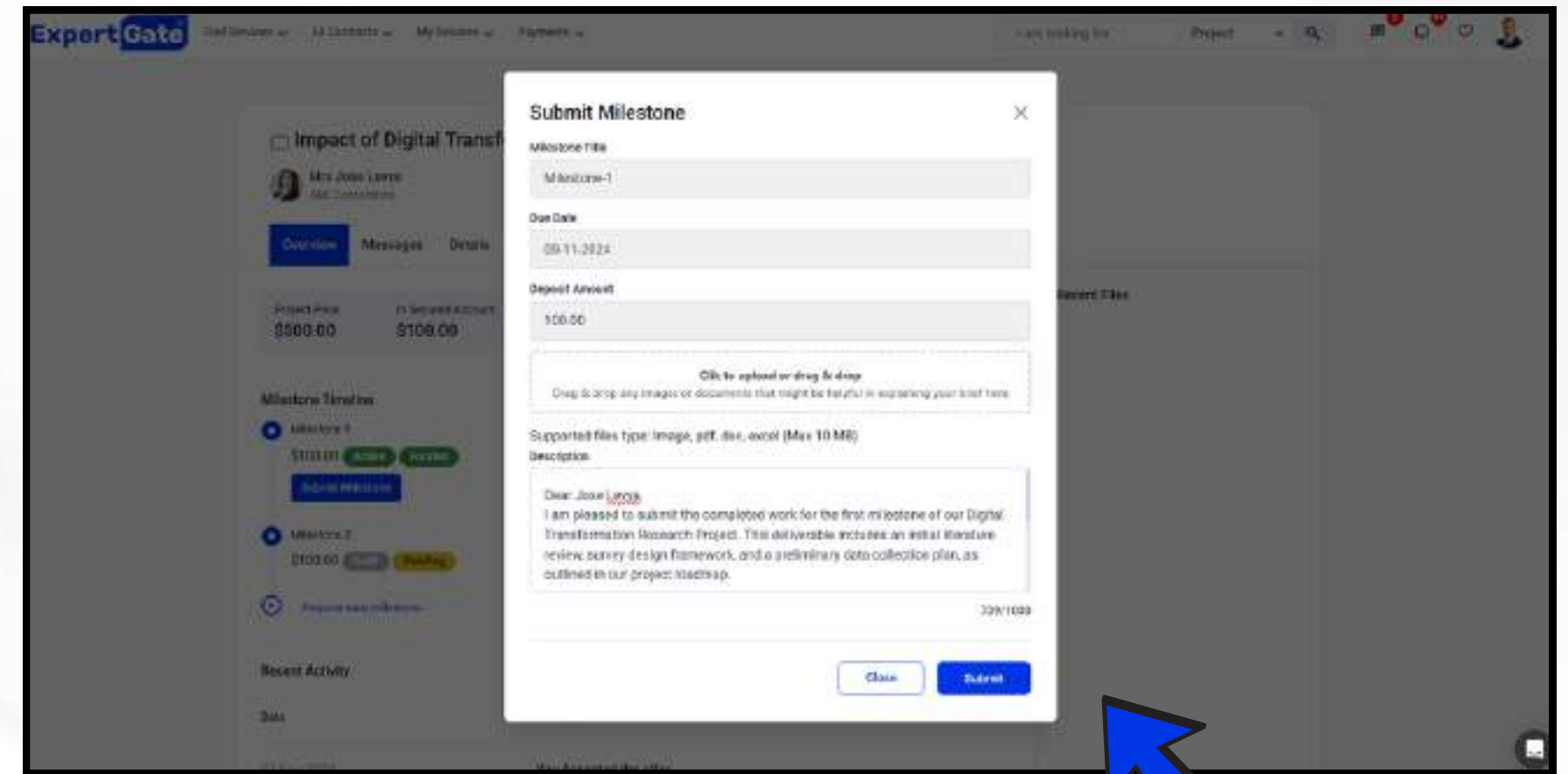
Date	Description
07 Nov 2024	You Accepted the offer



# Expert to submit milestone on project work completion

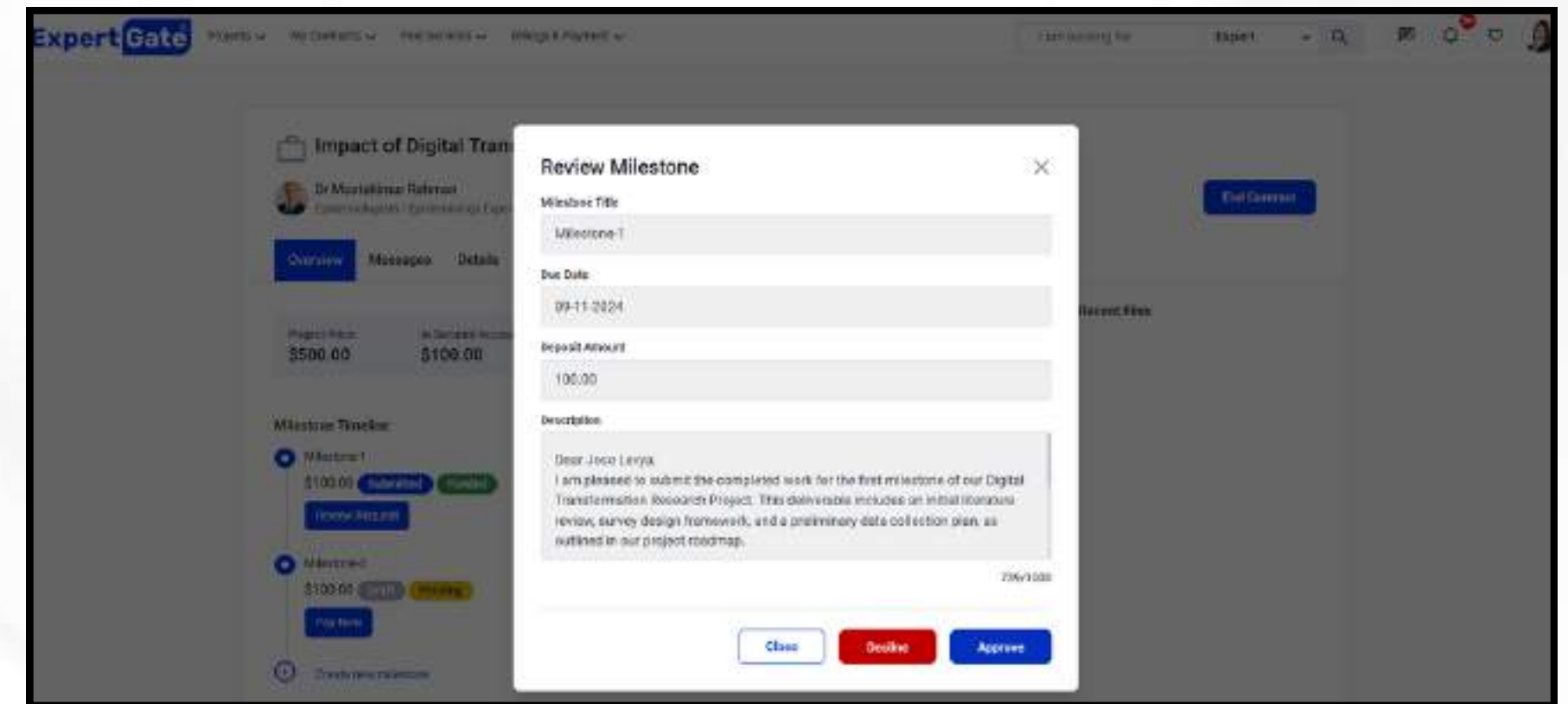
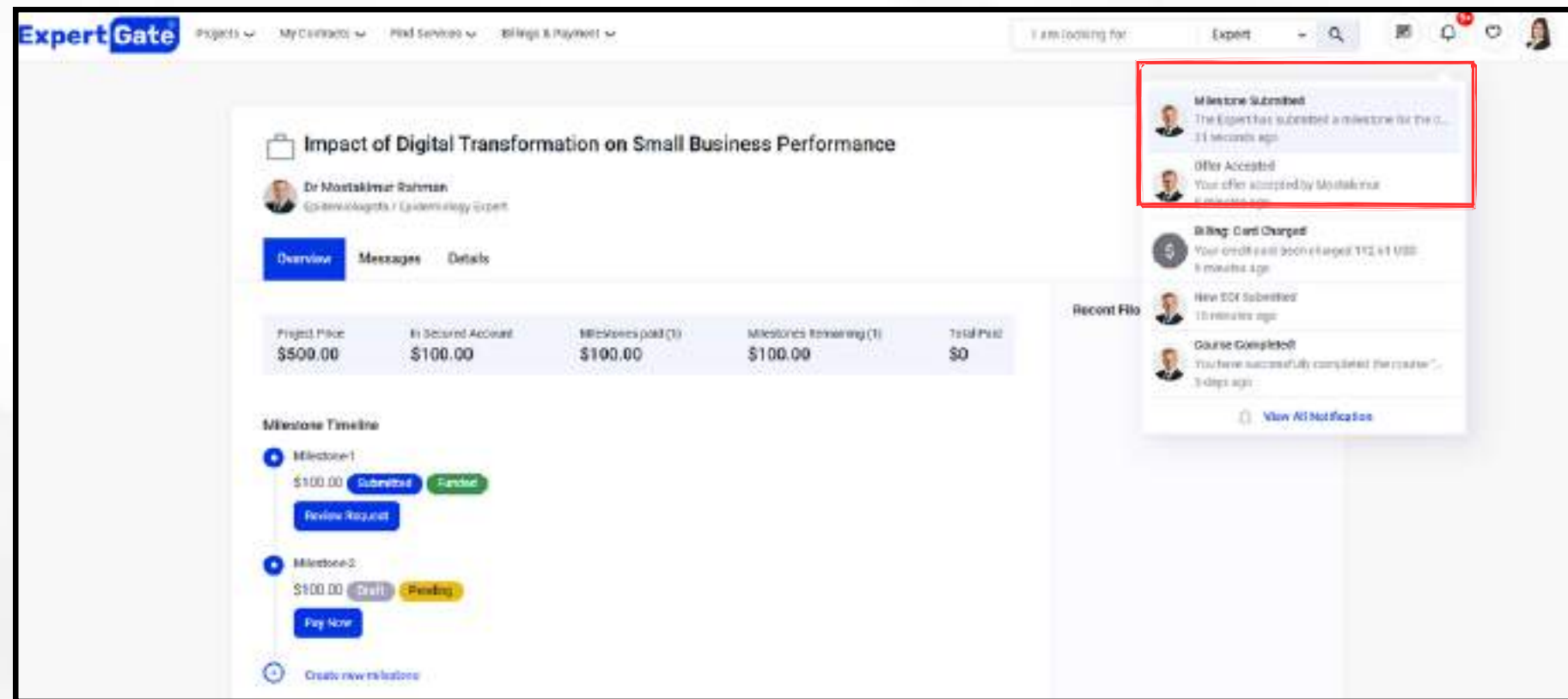


After milestone is funded, expert needs to submit the work by submitting the milestone

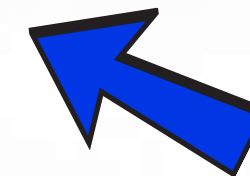


Expert can submit the milestone by attaching the files and submitting the message

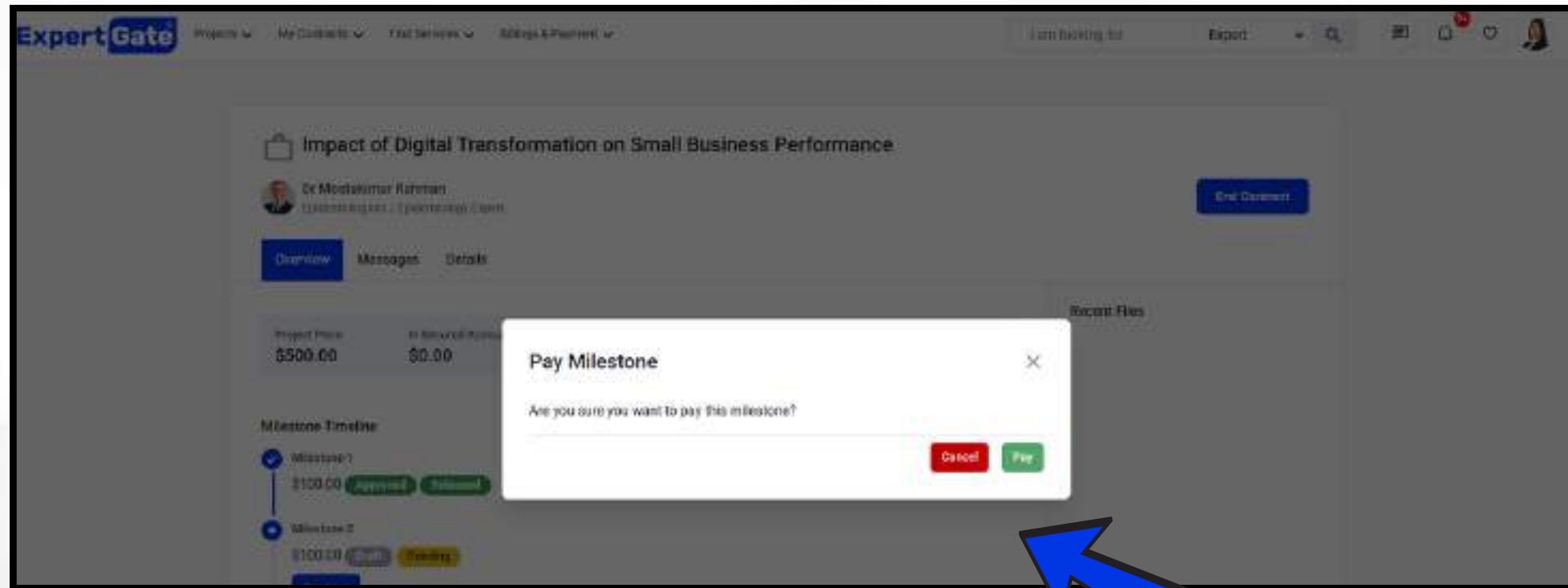
# Client will be notified on milestone submission by the expert



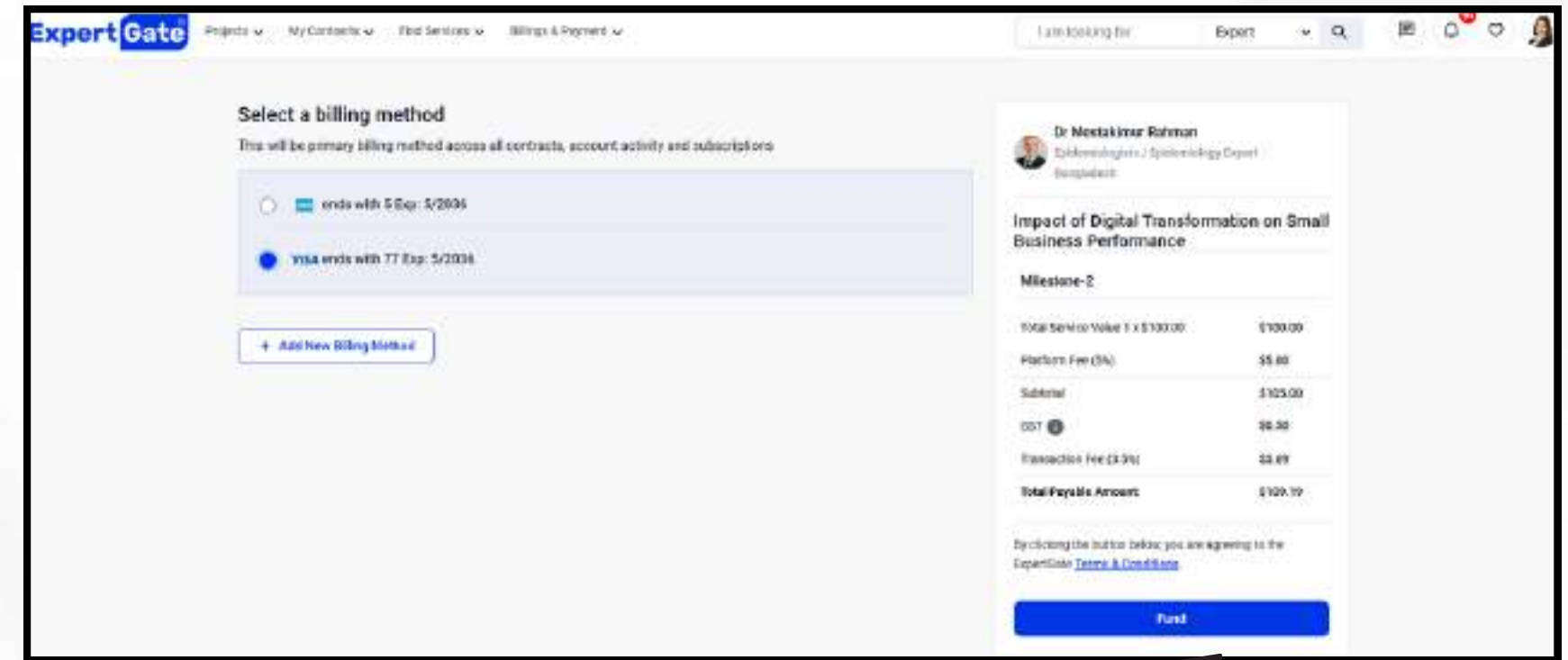
Client will review the work submitted and will then approve the milestone



# Client will fund next milestone



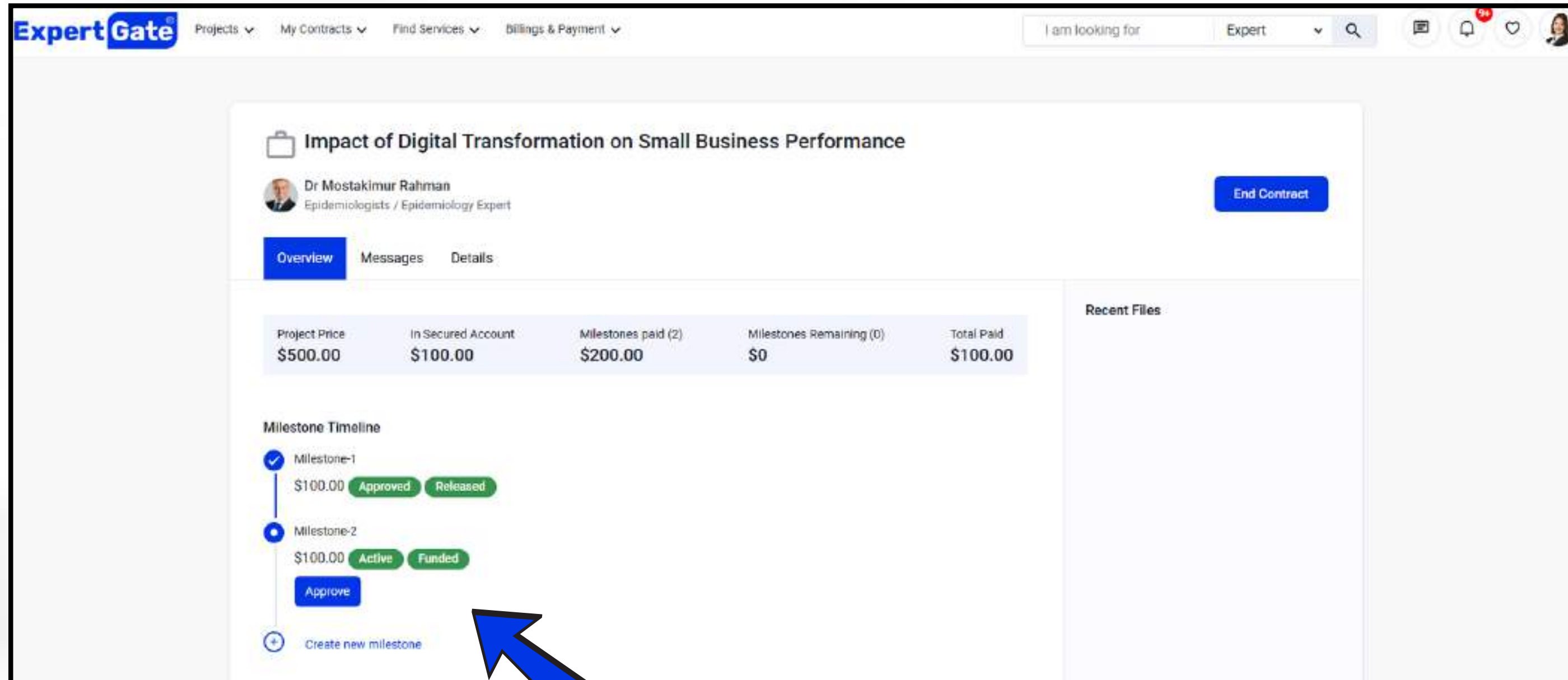
The screenshot shows the Expert Gate project page for 'Impact of Digital Transformation on Small Business Performance'. A 'Pay Milestone' dialog box is open, asking 'Are you sure you want to pay this milestone?'. The dialog has 'Cancel' and 'Pay' buttons. A blue arrow points from the 'Pay' button to the text box below.



The screenshot shows the 'Select a billing method' page. It displays two billing methods: 'ends with 5 Exp: 5/2024' and 'VISA ends with 77 Exp: 5/2024'. A 'Fund' button is visible at the bottom right. A blue arrow points from the 'Fund' button to the text box below.

After first milestone is approved, client will fund second milestone

# Second milestone funded



The screenshot shows the Expert Gate project dashboard for the project "Impact of Digital Transformation on Small Business Performance" by Dr. Mostakimur Rahman, an Epidemiologist / Epidemiology Expert. The dashboard includes a navigation menu, a search bar, and a summary table of project financials.

Project Price	In Secured Account	Milestones paid (2)	Milestones Remaining (0)	Total Paid
\$500.00	\$100.00	\$200.00	\$0	\$100.00

The Milestone Timeline shows two milestones:

- Milestone-1: \$100.00, Approved, Released
- Milestone-2: \$100.00, Active, Funded

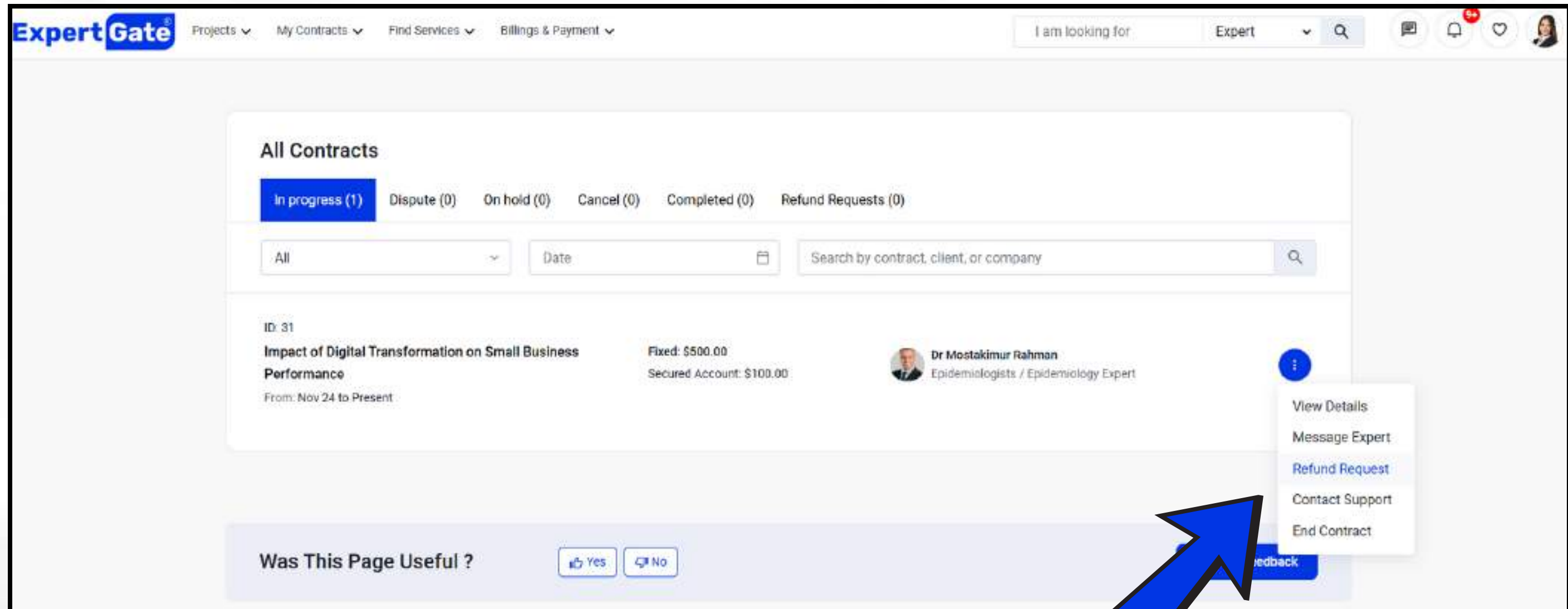
An "Approve" button is visible for Milestone-2. A blue arrow points from the "Approve" button to a text box below the screenshot.

Client funded the second milestone successfully



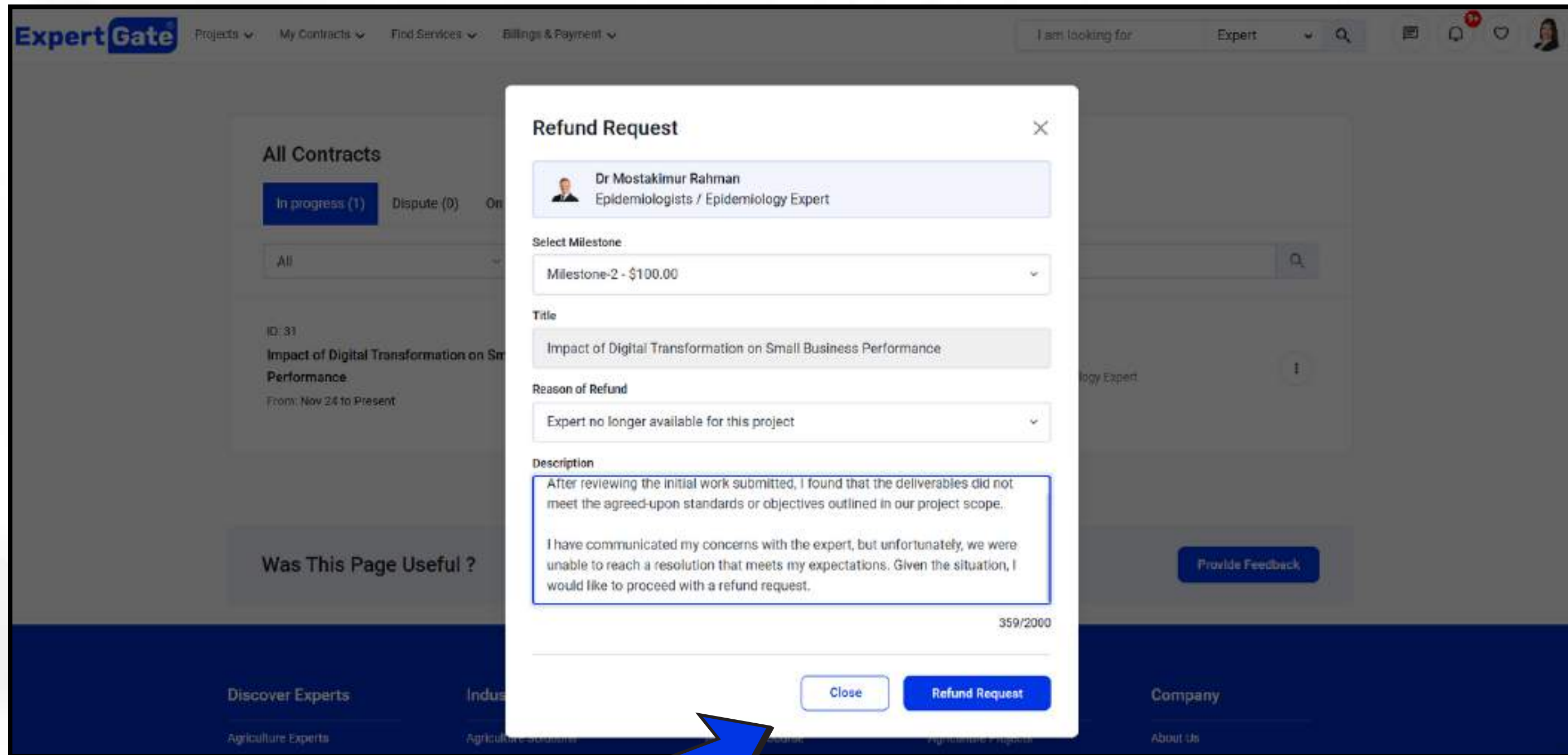
# How refund requests are handled ?

# Client initiating refund request




After funding the project or the milestone, client can request the refund

# Provide reason of refund request



**Refund Request**

 Dr Mostakimur Rahman  
Epidemiologists / Epidemiology Expert

Select Milestone  
Milestone-2 - \$100.00

Title  
Impact of Digital Transformation on Small Business Performance

Reason of Refund  
Expert no longer available for this project

Description  
After reviewing the initial work submitted, I found that the deliverables did not meet the agreed-upon standards or objectives outlined in our project scope.  
  
I have communicated my concerns with the expert, but unfortunately, we were unable to reach a resolution that meets my expectations. Given the situation, I would like to proceed with a refund request.

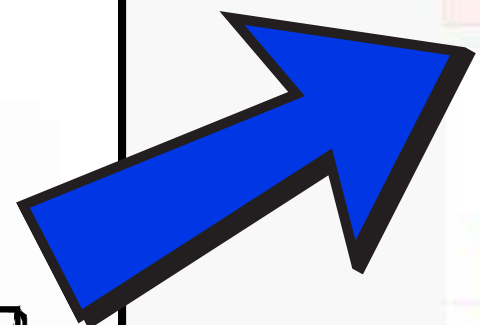
359/2000

[Close](#) [Refund Request](#)

Client will provide the reason for refund request

# Expert receives refund request

Expert is notified of the refund request by the client along with the reason



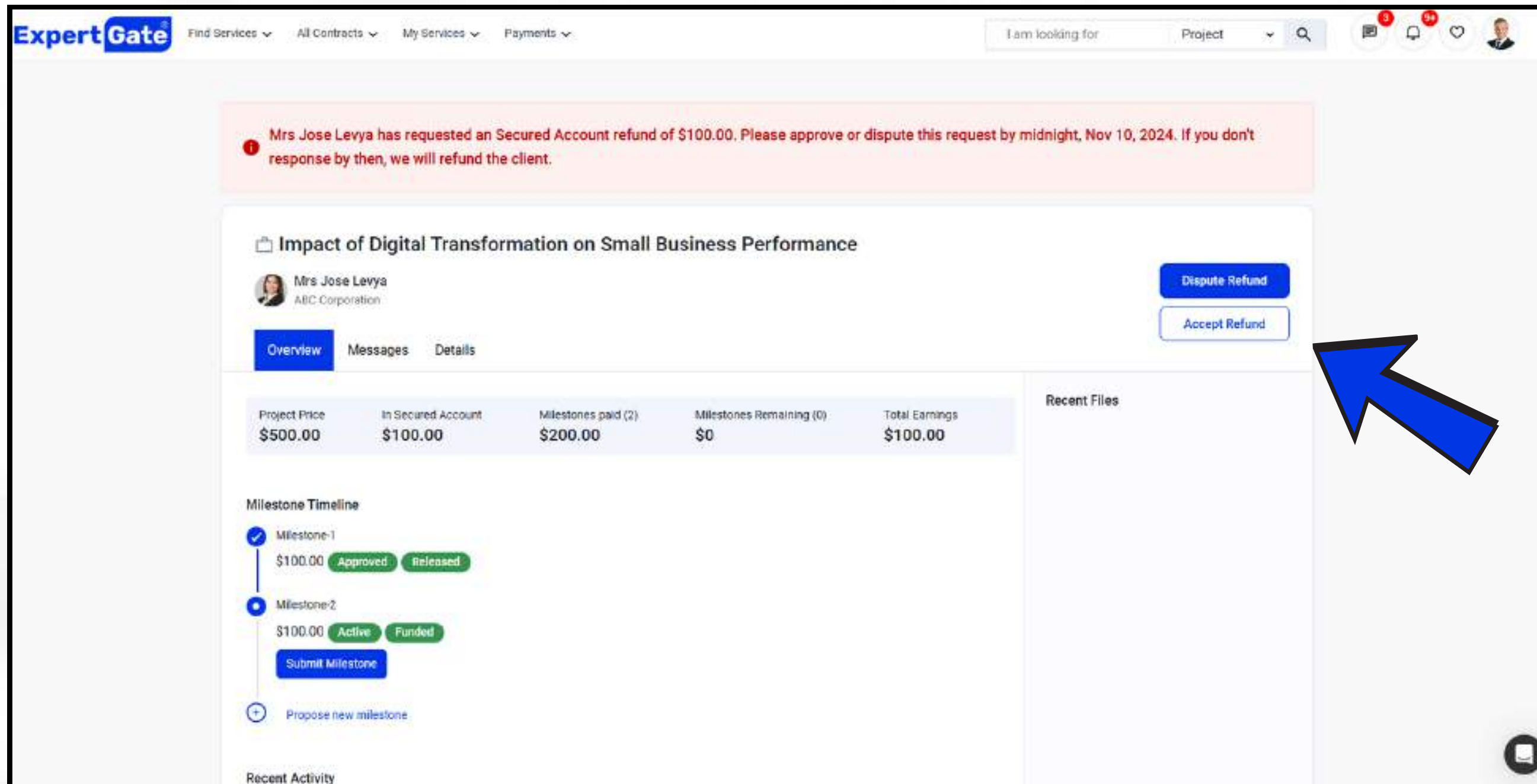
The screenshot shows the ExpertGate dashboard for a project titled "Impact of Digital Transformation on Small Business Performance" by Mrs. Jose Levy. A prominent red notification banner at the top states: "Mrs Jose Levy has requested an Secured Account refund of \$100.00. Please approve or dispute this request by midnight, Nov response by then, we will refund the client." Below this, a table displays project financials:

Project Price	In Secured Account	Milestones paid (2)	Milestones Remaining (0)	Total Earnings
\$500.00	\$100.00	\$200.00	\$0	\$100.00

The dashboard also features a "Milestone Timeline" with two milestones: Milestone-1 (\$100.00, Approved, Released) and Milestone-2 (\$100.00, Active, Funded). A "Recent Activity" section is visible at the bottom. On the right side, a notification panel lists several updates, including the refund request, a new milestone creation, a payment notification, a milestone approval, and a new offer received.



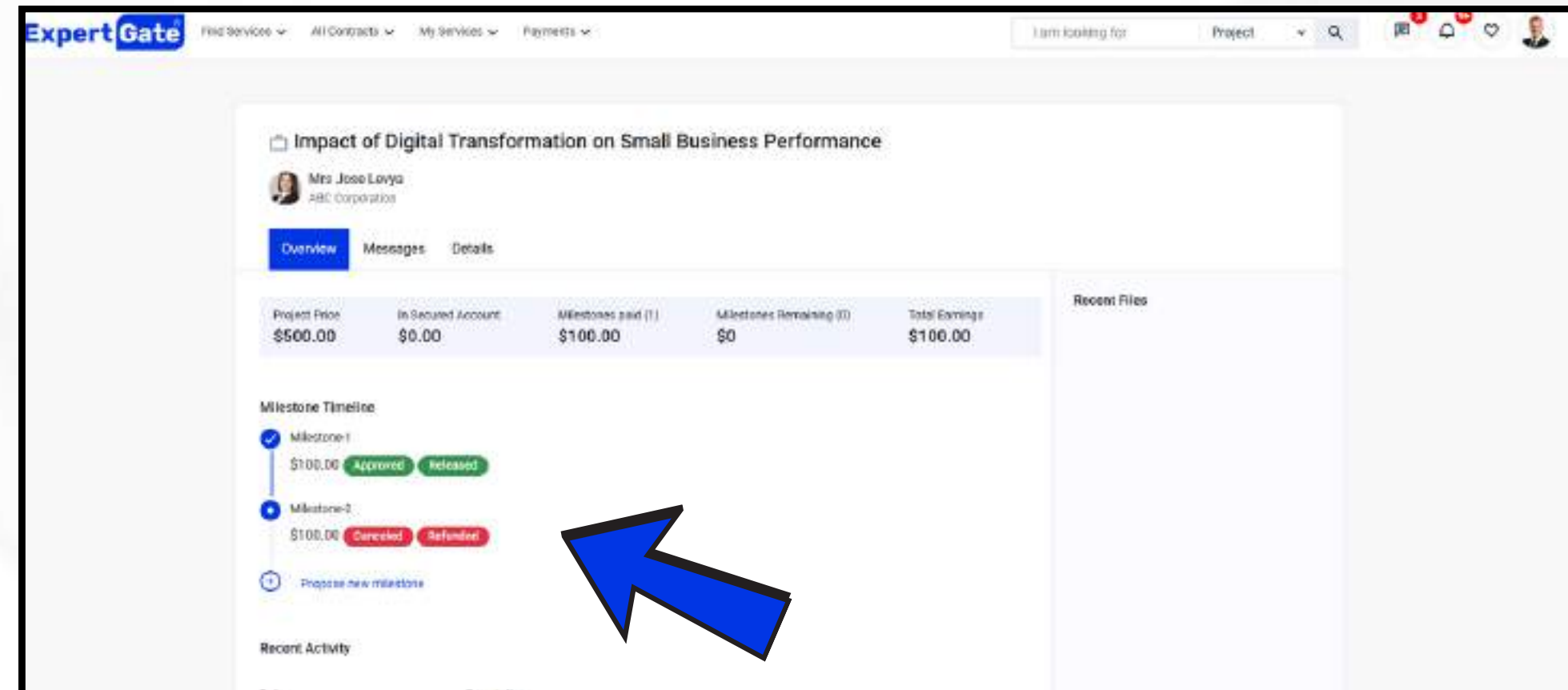
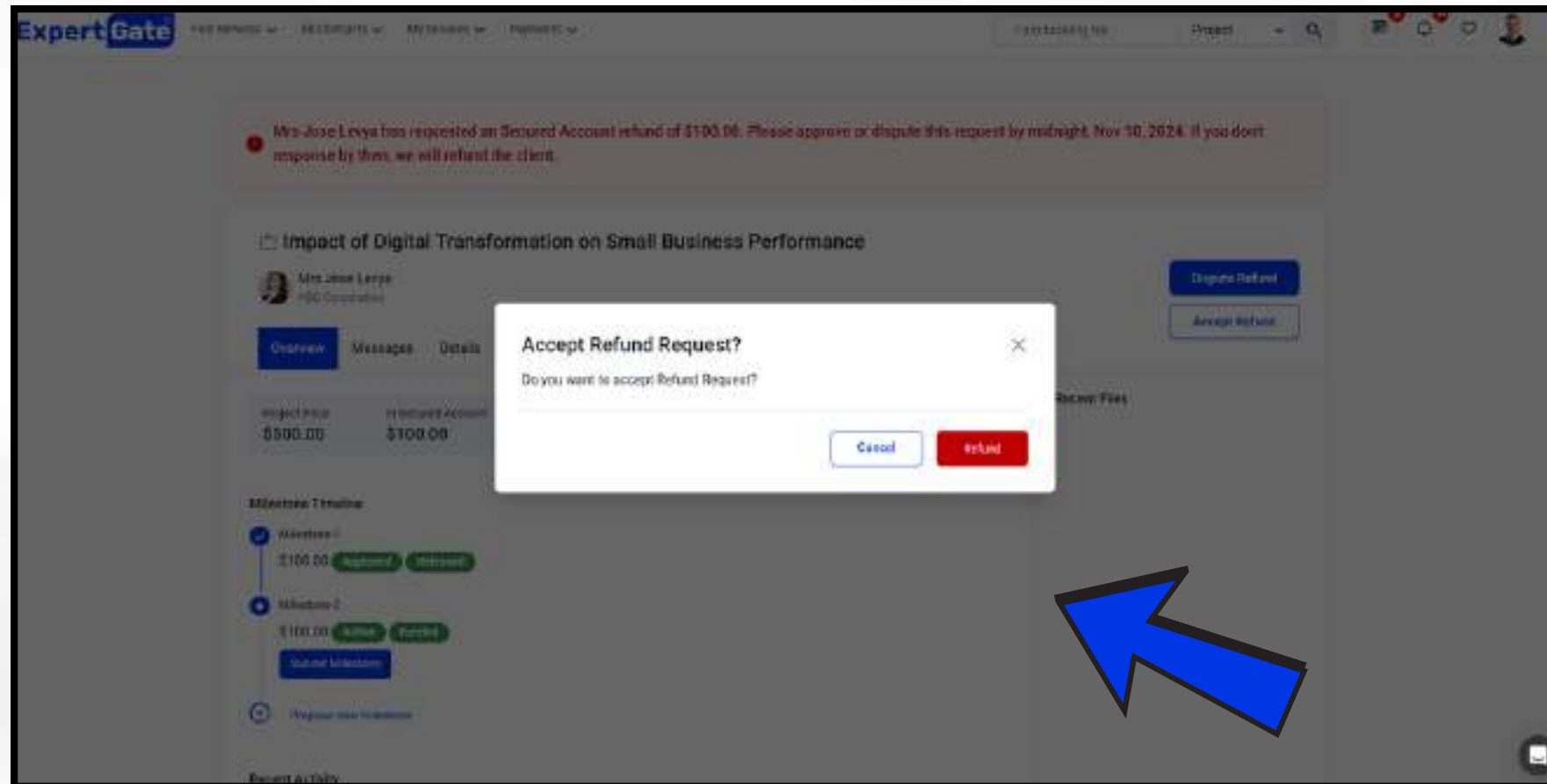
# Expert can accept the refund request or dispute it



The screenshot displays the Expert Gate interface. At the top, there is a navigation bar with the Expert Gate logo, menu items (Find Services, All Contracts, My Services, Payments), a search bar, and user profile icons. A prominent red notification banner states: "Mrs Jose Levya has requested an Secured Account refund of \$100.00. Please approve or dispute this request by midnight, Nov 10, 2024. If you don't response by then, we will refund the client." Below this, the project details for "Impact of Digital Transformation on Small Business Performance" are shown, including the client "Mrs Jose Levya" and "ABC Corporation". A table provides financial summary: Project Price (\$500.00), In Secured Account (\$100.00), Milestones paid (2) (\$200.00), Milestones Remaining (0) (\$0), and Total Earnings (\$100.00). A "Milestone Timeline" shows Milestone-1 as "Approved" and "Released" for \$100.00, and Milestone-2 as "Active" and "Funded" for \$100.00. On the right side of the project details, there are two buttons: "Dispute Refund" and "Accept Refund". A large blue arrow points to the "Accept Refund" button. The bottom of the page shows "Recent Activity" and "Recent Files" sections.

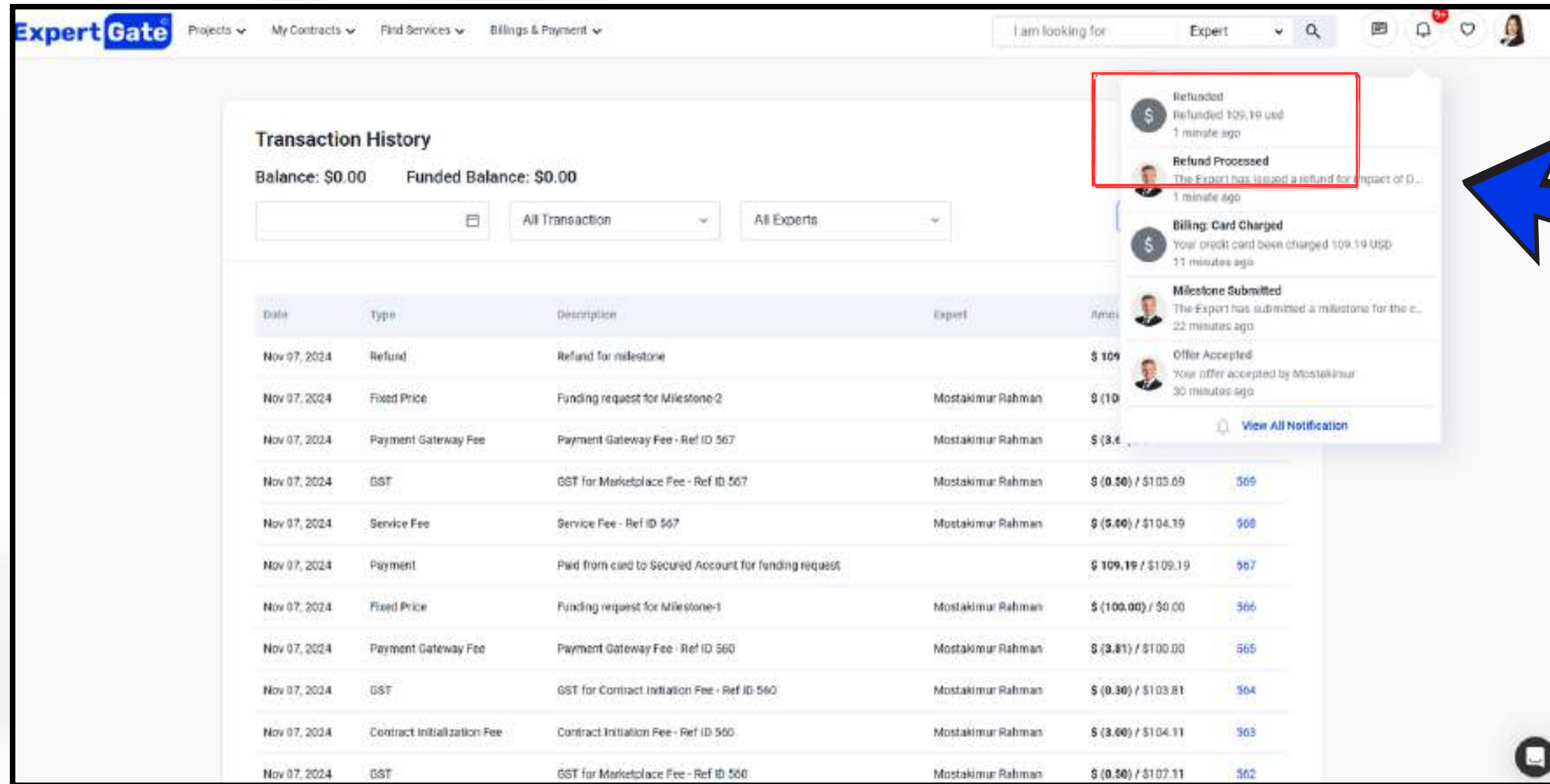
Project Price	In Secured Account	Milestones paid (2)	Milestones Remaining (0)	Total Earnings
\$500.00	\$100.00	\$200.00	\$0	\$100.00

# Expert accepts the refund request



Experts accept the refund request and milestone is cancelled

# The client receives the refund



**Transaction History**  
Balance: \$0.00    Funded Balance: \$0.00

All Transaction    All Experts

Date	Type	Description	Expert	Amount	Refund
Nov 07, 2024	Refund	Refund for milestone		\$ 109	
Nov 07, 2024	Fixed Price	Funding request for Milestone 2	Mostakimur Rahman	\$ (10	
Nov 07, 2024	Payment Gateway Fee	Payment Gateway Fee - Ref ID 567	Mostakimur Rahman	\$ (3.4	
Nov 07, 2024	GST	GST for Marketplace Fee - Ref ID 567	Mostakimur Rahman	\$ (0.30) / \$103.09	569
Nov 07, 2024	Service Fee	Service Fee - Ref ID 567	Mostakimur Rahman	\$ (5.00) / \$104.19	568
Nov 07, 2024	Payment	Paid from escrow to Secured Account for funding request		\$ 109.19 / \$109.19	567
Nov 07, 2024	Fixed Price	Funding request for Milestone-1	Mostakimur Rahman	\$ (100.00) / \$0.00	566
Nov 07, 2024	Payment Gateway Fee	Payment Gateway Fee - Ref ID 560	Mostakimur Rahman	\$ (3.81) / \$100.00	565
Nov 07, 2024	GST	GST for Contract Initiation Fee - Ref ID 560	Mostakimur Rahman	\$ (0.30) / \$103.81	564
Nov 07, 2024	Contract Initialization Fee	Contract Initiation Fee - Ref ID 560	Mostakimur Rahman	\$ (3.00) / \$104.11	563
Nov 07, 2024	GST	GST for Marketplace Fee - Ref ID 560	Mostakimur Rahman	\$ (0.50) / \$107.11	562

**Refunded**  
Refunded 109.19 USD  
1 minute ago

**Refund Processed**  
The Expert has issued a refund for impact of D...  
1 minute ago

**Billing: Card Charged**  
Your credit card been charged 109.19 USD  
11 minutes ago

**Milestone Submitted**  
The Expert has submitted a milestone for the e...  
22 minutes ago

**Offer Accepted**  
Your offer accepted by Mostakimur  
30 minutes ago

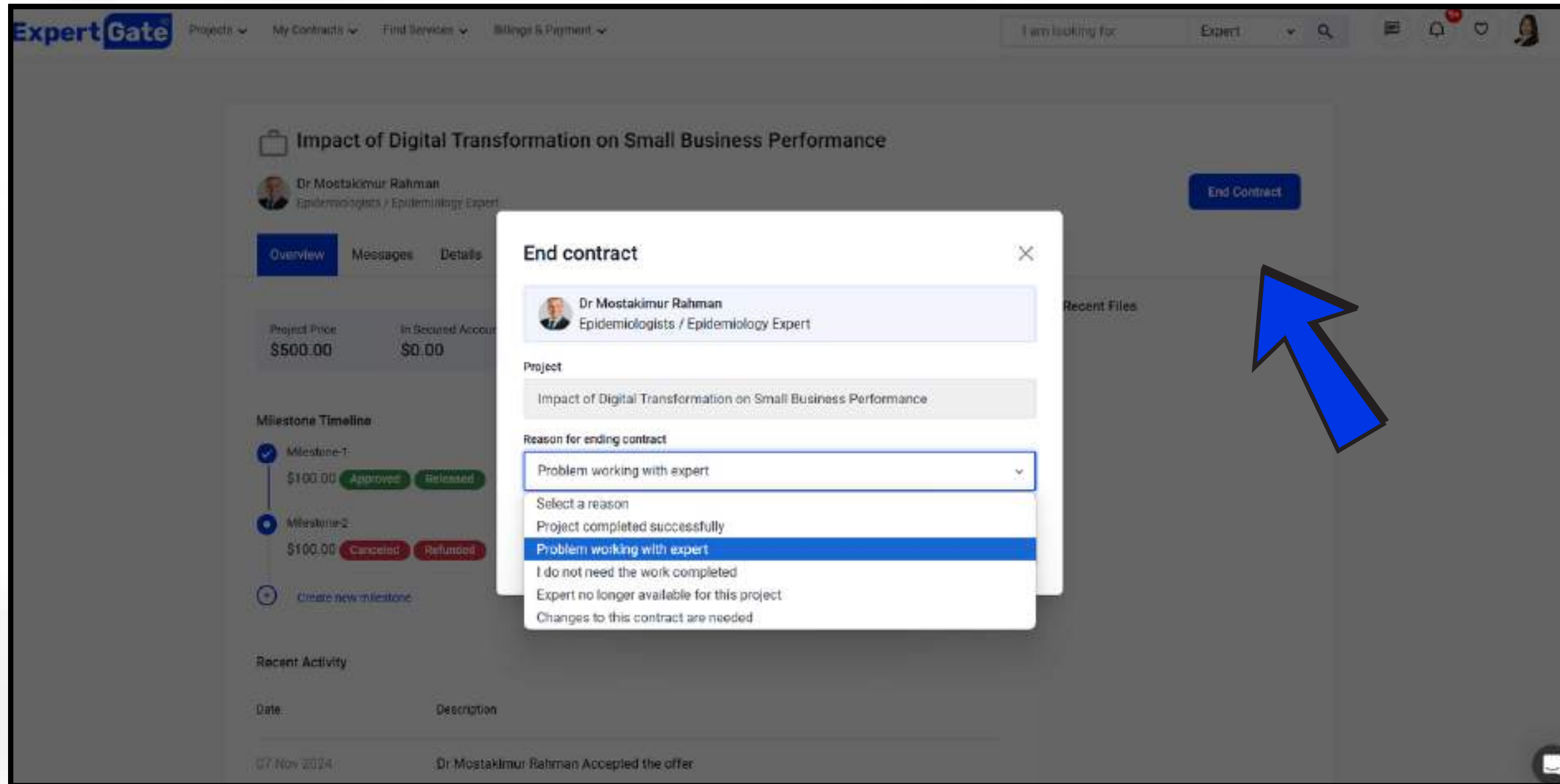
[View All Notification](#)

When expert accepts the refund request, client is notified and amount is refunded.



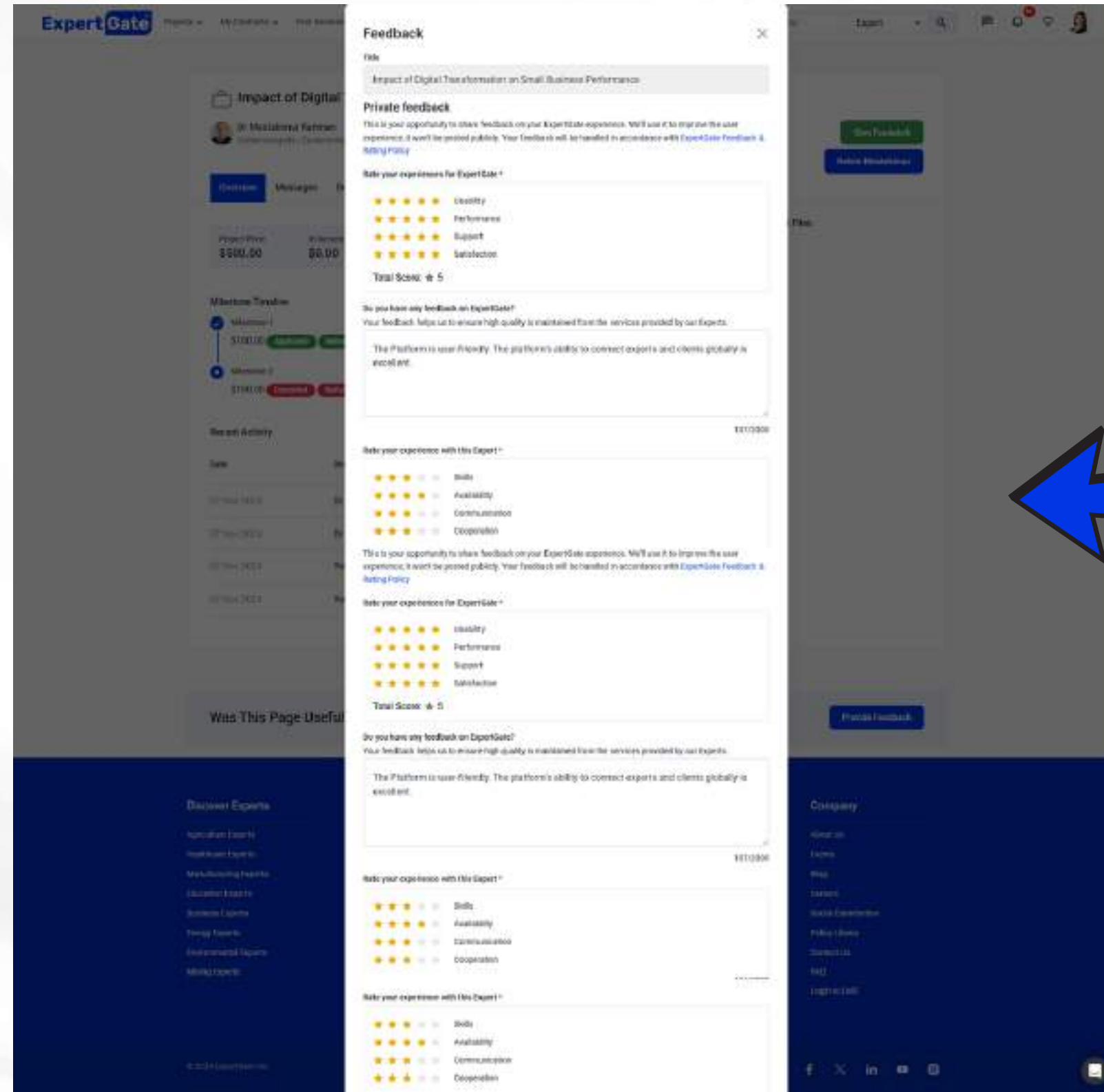
**How to end the project  
upon completion or  
otherwise?**

# Client ends the contract



Client can end the project by selecting one of the listed reasons

# Client's feedback to the expert



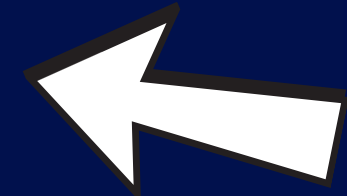
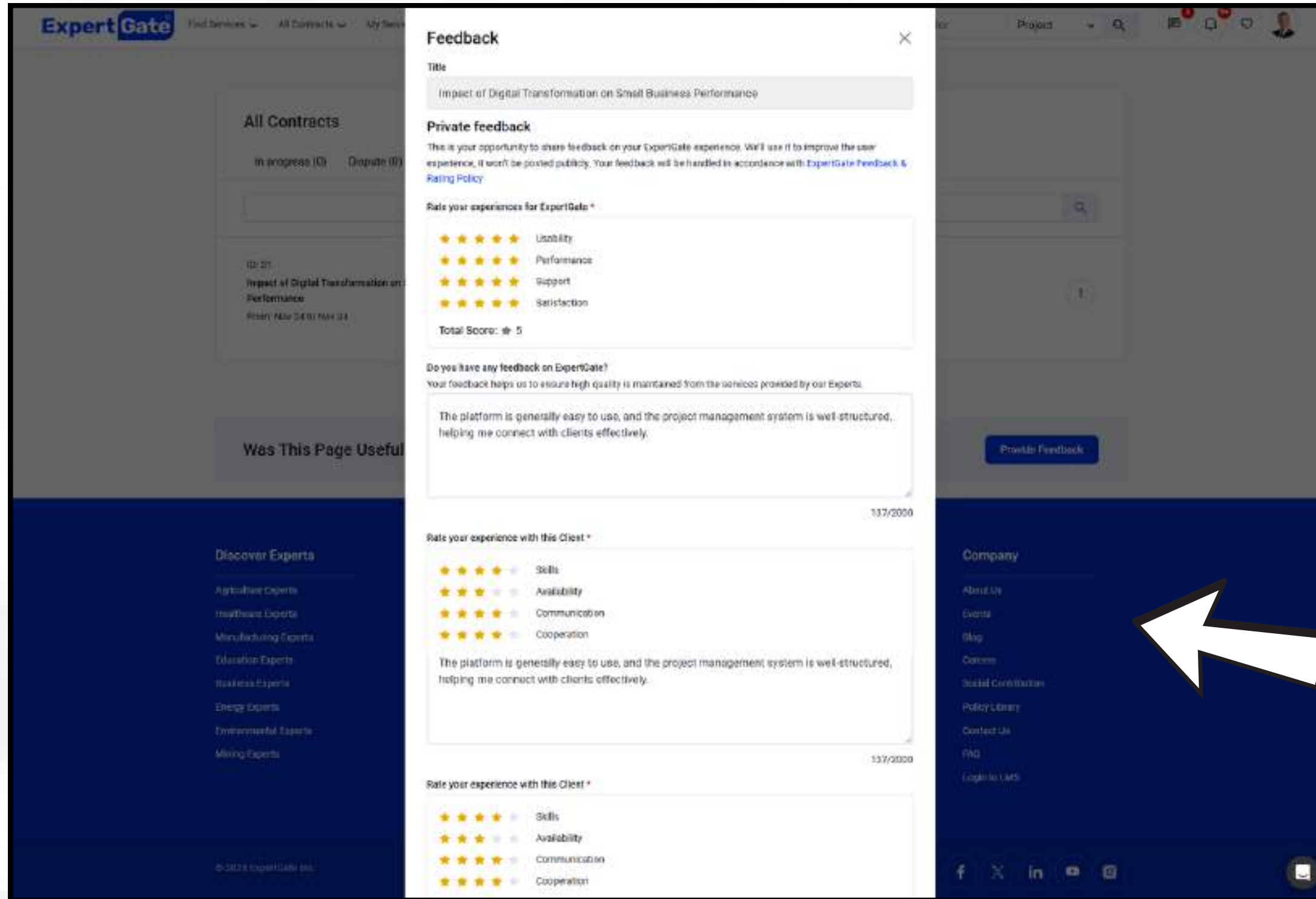
After client ends the contract, they need to provide the feedback to the expert

# Expert's feedback to the client

The screenshot shows the ExpertGate dashboard interface. At the top, there is a navigation bar with the ExpertGate logo, menu items for 'Find Services', 'All Contracts', 'My Services', and 'Payments', and a search bar. Below the navigation bar, the 'All Contracts' section is visible, with tabs for 'In progress (0)', 'Dispute (0)', 'On hold (0)', 'Cancel (0)', 'Completed (1)', and 'Refund Requests (0)'. A search bar is present below the tabs. The main content area displays a contract card for 'Impact of Digital Transformation on Small Business Performance' with a 'Fixed : 500.00' amount and a 'Give Feedback' button. A blue arrow points to this button. To the right, a notification panel shows several messages, including 'Contract Completed', 'Refund Processed', 'Refund Request for Contract', 'New Milestone Created', and 'Great news! You got paid.'. At the bottom of the dashboard, there is a feedback section with the text 'Was This Page Useful?' and buttons for 'Yes', 'No', and 'Provide Feedback'.

Expert can visit their dashboard and give feedback to the client

# Expert's feedback to the client



Expert can visit their dashboard and give feedback to the client





# Payments Management

# Payments Management

## Transparency, Reliability, and Security:

- At ExpertGate, we prioritise trust in all collaborative endeavours.
- Our robust payment and pricing policy is designed to:
  - Safeguard your interests through transparent processes.
  - Ensure smooth and fair transactions.

## Key Principles

- **Transparency:** Clear pricing and fees at every step.
- **Reliability:** Consistent and timely payments for all services.
- **Security:** Advanced measures to protect all financial transactions.  
Detailed explanation in ExpertGate's payment policy.

# Payments Management

## Secure Payment Handling:

- ExpertGate partners with Stripe and utilises **Stripe Express Connect** to securely handle payment delivery, holding, and receipt for contracts/sessions between experts and clients.
- Students are required to pay in advance, with funds held in a designated **Platform Secured Account under the expert's name**, protected by Stripe, and kept separate from our operational accounts to ensure security and transparency.
- All experts must complete **Know Your Customer (KYC)** verification as mandated by Stripe to ensure compliance and security in financial transactions.

## Automatic Release of Funds

- After an Expert completes a Project or Session, they submit a release request to the client.
- The Customer has a designated review period to assess the delivered service and ensure the agreed-upon requirements are met.
- If there are no objections after the review period ends, funds held in the Platform Secured Account will be **automatically released** to the Expert's account.

# Payment Structure at ExpertGate

Contract Type	Platform Fee	Contract Value	Service Charge Fee (10%)	Expert's Earning
Fixed Price Contract	10%	\$100	\$10	\$90
Hourly Contract	10%	\$100 per hour	\$10 per hour	\$90 per hour
Consultation Session	10%	\$100	\$10	\$90
Course	10%	\$100	\$10	\$90

**Automated Payments:** The payment system is fully automated, ensuring timely and secure transactions for all parties.

**Revenue Sharing:** Experts receive a percentage of the course fees based on their role as either Organising Instructors or Co-Instructors.

**50% Social Contribution:** ExpertGate commits to reinvesting 50% of profits into educational initiatives, benefiting underserved communities.

**Transparent Payouts:** Experts can track their earnings in real-time through their dashboard, with payments processed automatically after course completion.

# Q/A

**We welcome your questions!**

If you have any inquiries about ExpertGate, or consultation sessions, please feel free to ask!