User Guide – How to Create a Service

Begin by logging in to your ProcureHub account

ProcureHub Marketplace

Dashboard

My Services

Calendar

Requests

Orders

Inbox

Settings

Sponsored Ads

Invite Other Users

Customer **Supplier**

1. Upon log in ensure you on the Supplier tab

2. Click on My Services from the menu on the left.

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To create a new service, click on Add new

⊕ **Add new**

You must connect to Stripe in order to sell on the marketplace. Your listings will not be visible until you connect.

Active ⌄

Marketing ⋮

Edit ⋮

Test New Service for Request

CAD 1255.00

Any services you've already created will show under Active

You can edit existing services here. Or click on the 3 dots for more options like deleting the listing or sharing.

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- Complete the basic information for your service.
- Category and subcategory are pre-defined drop-down fields. Should you not see a category or sub-category you need please contact the ProcureHub team (ProcureHubMarketplace@gmail.com)

You can save the service in draft at any time and work on it later

Save draft   ⊘ Publish

1. Basic Information   >   2. Details   >   3. Set Availability

Listing information
Choose and set up one or more service types, such as hourly, monthly and flat-rate.

Listing name

Category

Subcategory

Items

Description

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- You can offer your service either at an hourly rate or by fixed fee
- Toggle on (it will show in green) which type of service it will be

Set up Hourly offering

🟢 Allow buyers to book this service at an hourly rate

Hourly Rate	Your estimated earning ⑦
CAD 0.00	CAD 0.00

Set up Flat Fee offerings

⚪ Allow buyers to buy your different service offerings at a fixed rate

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- To set up an **Hourly Service** type in the hourly rate you charge (before taxes)
- Your estimated earning shows what your revenue would be (before Stripe fees)

Set up Hourly offering

🟢 Allow buyers to book this service at an hourly rate

Hourly Rate

CAD 250.00

Your estimated earning ⑦

CAD 225.00

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- To set up a **Flat Fee or Fixed Fee** offering toggle that option on and then click on 'Add new Flat Fee Offering'

Set up Flat Fee offerings

Allow buyers to buy your different service offerings at a fixed rate

⊕ **Add new Flat Fee offering**

- Type in the service name, description and the flat fee amount (before taxes)

≡ Service name

Description

Price

CAD 0

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- Next you can add images. Your service must have at least one image (cover image). Files must be an image file only (PNG, JPEG, JPG)

- You also have the option of adding a link to a YouTube or Vimeo video if you wish

- Click on Go to details

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Additional Info

#Employees *
Please select the size of your business

☐ 1 to 10   ☐ 11 to 50   ☐ 51 to 200   ☐ 501 to 1000   ☐ 1001 to 5000   ☐ 5001 to 10000   ☐ 10000+

Annual Revenue *
Please select from the following

Choose an option ⌄

Years in Business *
Please enter in the number of years in business

Choose an option ⌄

Languages Supported *
Please select the languages supported.

☐ English   ☐ French   ☐ Cantonese   ☐ Japanese   ☐ Mandarin   ☐ Punjabi   ☐ Spanish

Industry *
What industries does your company typically serve?

☐ All   ☐ Agriculture   ☐ Animals & Pets   ☐ Art & Design   ☐ Beauty & Cosmetics   ☐ Blockchain & Cryptocurrency
☐ Construction   ☐ Dental care   ☐ Education   ☐ Events planning   ☐ Energy & utilities   ☐ Environmental   ☐ Fashion & Apparel
☐ Food & Beverage   ☐ Financial Services & business   ☐ Gaming   ☐ Health & Wellness   ☐ Kids   ☐ Legal   ☐ Lifestyle
☐ Marketing & Advertising   ☐ Media & Entertainment   ☐ Manufacturing & storage   ☐ Medical & Pharmaceutical   ☐ Non profit
☐ Photography & videography   ☐ Public Sector   ☐ Real Estate   ☐ Religion & spirituality   ☐ Retail & Wholesale   ☐ Science
☐ Services   ☐ Society & culture   ☐ Sports & fitness   ☐ Technology   ☐ Transportation & automotive   ☐ Travel & tourism
☐ Writing & publishin   ☐ Other

Software *
What software are you proficient in using?

☐ Hubspot CRM   ☐ Moosend   ☐ Pipedrive   ☐ Salesforce   ☐ Zendesk   ☐ Zoho CRM   ☐ Other

Tools *
What tools is your company proficient in using?

☐ Content Creation & Design   ☐ Customer Relationship Management (CRM)   ☐ Data Reporting & Analytics
☐ Digital Asset Management   ☐ Event Marketing   ☐ Lead Capture & Conversion   ☐ Lead Generation
☐ Lead Nurturing & Email Marketing   ☐ Marketing Automation   ☐ Online Advertising   ☐ Project Management
☐ Search Engine Optimization   ☐ Social Media   ☐ Video Marketing   ☐ Website Optimization & CRO   ☐ Other

Skills *
Keeping your skills up to date helps you get the jobs you want.

☐ B2B Marketing   ☐ Email Marketing   ☐ Facebook   ☐ Instagram   ☐ Lead Generation   ☐ Marketing Research
☐ Marketing Strategy   ☐ Social Media Management   ☐ Social Media Marketing   ☐ Other

All of the additional information fields are also searchable fields for customers. This can help potential customers find the right Suppliers within the industry, experience or skills they require.

If there is an Industry, Software, Tools or Skills not listed that you would like added please contact the ProcureHub Support team.

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Returns & Refunds

Refund policy

Here you can list your Refund Policy.

More information

Files

Add PDF files of your listing (optional). File size limit: 5mb

[Add PDF file]

You are able here to attached 1 PDF file to your service.

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1. Basic Information　❯　2. Details　❯　**3. Set Availability**

Set available days

Weekday	From	To	
Monday, Tuesday, Wednesday, Thursday	10:00 AM	4:00 PM	🗑

| Days ⌄ | 12:00 AM ⌄ | 12:00 AM ⌄ | ⊕ |

☐ Apply to all my Services

Checking this box will apply your availability to all new services you create moving forward.

Here you can you set your availability to let potential customers know which days of the week your available *Note this does not tie into your external calendar

You must click on the Plus sign to save the time you've added.

Set unavailable days

Go to Your Calendar to set up the days in which you will not be available during the year

You can also block entire chunks off as unavailable if you wish

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1. Basic Information > 2. Details > **3. Set Availability**

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Set unavailable days

Go to Your Calendar to set up the days in which you will not be available during the year

You can also block entire chunks of time as unavailable if you wish. This can also be accessed on your dashboard through the Calendar and can be applied to all Services.

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Payment Terms
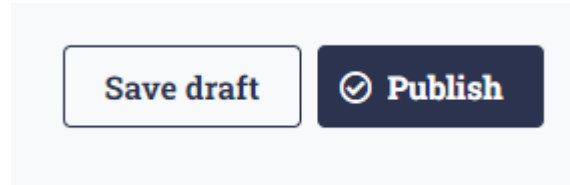
Enter when payment is due

○ Net   [X]   Days   ⦿ Get paid when job is completed

- Finally, you can set your payment terms.

- You can choose to be paid when job is completed.

- Or you can choose payment terms. This means once the job is completed you will receive payment in X number of days (i.e. Net 10, 30 etc.)

- Job completion is triggered by either the end date the customer requested the services by or the customer manually changing the status to complete

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- When ready you can 'Save draft' or 'Publish' your service.

- Please note you must have connected your Stripe Account in order to publish a service. If you have not, you will see the following message:

Cashout

Stripe Connect

Connect your Stripe account to publish your listing

> You must connect to Stripe in order to sell on the marketplace. Your listings will not be visible until you connect.