

User Guide – How to Create a Request for Proposal

- The purpose of creating a Request for Proposal is to receive multiple bids for a specific service you require that is not listed on the marketplace.
- Your Request for Proposal can either be public, meaning any Supplier may view the request (note that a supplier must have a service set up in the same Category in order to submit a response). Or it can be private, meaning you will select which Suppliers to send the Request too
- Login in to your ProcureHub account and from the main page select Requests for Proposal along the top navigation or Requests under Dashboard on the left-hand side.

The screenshot displays the ProcureHub Marketplace dashboard. At the top left is the ProcureHub Marketplace logo. The top right navigation bar includes 'Requests For Proposal' (highlighted with a red box), 'Services', 'Resource Centre', and a user profile icon labeled 'SMCust'. The left-hand navigation menu includes 'Dashboard', 'My Services', 'Calendar', 'Requests' (highlighted with a red box), 'Orders', 'Inbox', and 'Settings'. The main content area is titled 'Customer' and includes a 'Become a Supplier' link. It features a 'PROFILE' section for 'Demo Customer PPC - SM' (SMCustomerDemo, Member since 5/11/2023) with a 'My settings' button. Below this is a 'MY ORDERS' section with three entries: 'Demo - Logo Creation' (06/13/2023 CAD 500, Job Completed), 'Demo - Website Creation' (06/09/2023 CAD 5500, Job Completed), and 'Logo Creation' (06/06/2023 CAD 250, Job Completed). To the right is a 'MESSAGES' section with three messages from TXHR and LegalEagle. At the bottom right is a 'CALENDAR' section with a 'Go to my Calendar' link.

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- Depending on which route you chose to create the request, on the next screen you either click on:



Create a Request for Proposal

Describe what you're looking for?

What do you need?

Category
Marketing

Subcategory
Web Development

Item

Select tags that apply to your request.
Ex1 Ex2 Ex3

Type any tag that you think is relevant, separated by commas.

Next

Begin with the basics for your request. From the drop down select the Category, the Subcategory and then add tags if you like and click Next.

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General information

Choose a name for your Request

New Website

Describe what you are looking for

Add your description here.

Next

Add a title to your request. This is the title Suppliers will see.

Add a detailed description of the services you're looking for.

You may add a clickable link to a website or additional documents in a shared repository within the description field.

Add Images

Add images of what you are looking for. The first one will be the Cover image and will be displayed in the Browse page. You can reorder them.



Next

You can add images to your Request. The first image (Cover) will appear along with the title for Suppliers to view.

At this time only Image files (JPEG, PNG) are acceptable documents. Additional pieces of information in other formats (i.e. word or excel) would need to be saved as an image file.

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More Information

Budget

How much are you looking to pay for this?

CAD to CAD

End Date

When do you need this by?

07/13/2023

Request Privacy

Who can see this request?

Public Private

I'm interested in receiving proposals from anywhere

Location

Leave empty if not needed

Enter a location

Radius

Leave empty if not needed

-

Next

I'm interested in receiving proposals from anywhere

Location

Leave empty if not needed

Enter a location

Radius

Leave empty if not needed

-

Here you can add additional details such as your budget or when you require the services to be provided by.

Please ensure your End Date is accurate as it cannot be updated once a purchase has been completed.

This is also where you would select Public (open to all Suppliers) or Private (you select the Supplier the Request will be sent too)

You can also indicate if there's a specific location from which you need to receive the Services. The default setting is to select the location. If you do not require the Services from a specific location, then toggle that on so the button is green

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[← Request Privacy](#)

Who can see this request?

My toolkit

There are no service providers with this category.

Others

There are no service providers with this category.


[Continue](#)

If you selected A Private Request, you will be prompted to select the Suppliers you'd like to invite. Any Suppliers providing Services under the Category you selected should appear and you may select which one/s to invite and click Continue.

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Excellent!

Are these details correct?

	<p>New Website</p> <p>CAD 100 - CAD 2500 <input type="checkbox"/> Ends on 07/13/2023 <input type="checkbox"/> Anywhere</p>
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Yes, publish my request

As a last step you can see how your Request will look once published. You can go back and edit anything or click Yes, publish my request.

Once published you will have an option to share this request over various social channels. Suppliers wishing to respond to the request who are not yet a verified supplier on the marketplace will need to sign-up and become a verified supplier.

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The screenshot displays a user interface for managing requests. On the left is a sidebar with navigation items: Dashboard, My Services, Calendar, Requests, Orders, Inbox, Settings, and Invite Other Users. The main area shows a list of requests under the 'Active' filter. The 'Created by me' filter is selected. The list contains two requests:

Request Title	Price Range	Ends on	Location	Actions
Human Resources Test	CAD 50.00 to CAD 60.00	07/11/2023	Ajax, Ontario, Canada	See 0 Proposals Edit
Marketing Social Media Manager	CAD 100.00 to CAD 1001.00	07/26/2023	Anywhere	See 0 Proposals Edit

Below the list, there is a section for 'Expired or Paused' requests. A context menu is open over the first request, showing options: Pause, Duplicate, Share, and Delete.

Your published Request can be found under your Dashboard -> Requests -> Created by me

You can see if you have received any proposals. You can edit your Request or you can Pause, Duplicate, Share it or Delete it.

Sharing a Request will copy a URL to the Request which you can share with any other potential Suppliers you may want to respond to this Request (inside or outside of the Marketplace).