

CONNEX TUTORIAL



How to Create an Exchange Center Post

Exchange Center posts are an RFI, RFQ or RFP posted within CONNEX Marketplace. These are typically posted by a buyer looking for a supplier who can meet their needs.

STEP 1.

Log in to the CONNEX platform

STEP 2.

Select Exchange Center and click on +Add Listing

STEP 3.

Select Needs to bring up the RFI, RFP or RFQ options. You'll need to select one to activate the Next button.

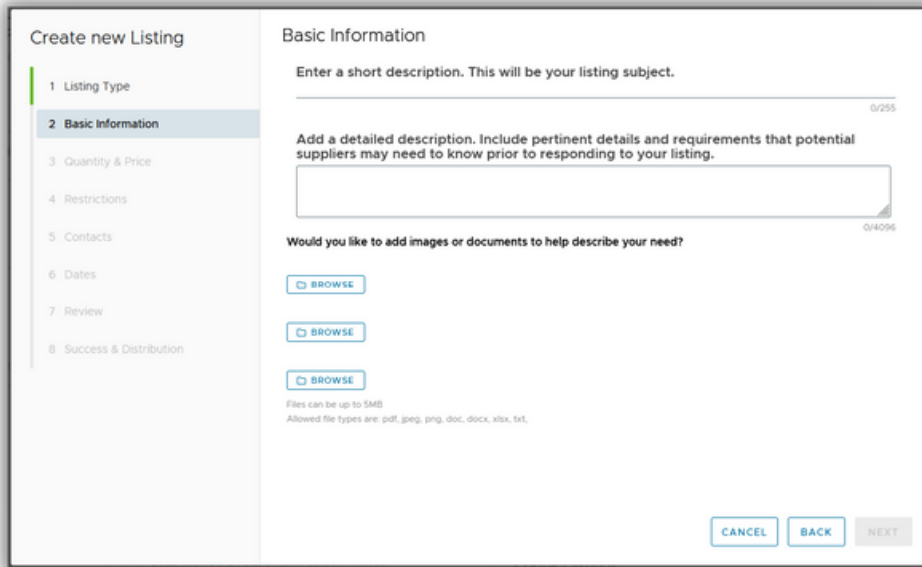
The screenshot shows the 'Create new Listing' form. On the left is a sidebar with steps 1 through 8. Step 1, 'Listing Type', is selected. The main form area is titled 'Listing Type' and contains the following questions and options:

- Are you buying or selling?
 - NEEDS
 - SURPLUS
 - ...
- Is this an RFI, RFQ, RFP, or Other Need?
 - RFI
 - RFQ
 - RFP
 - OTHER

At the bottom right of the form, there are two buttons: 'CANCEL' and 'NEXT'. The 'NEXT' button is circled in red.

STEP 4.

Enter both a short and detailed description of the product, material, part or capability you are looking for in the text boxes. The Short Description is what will be sent to manufacturers when the exchange center post is distributed. You can add .pdf, jpeg, png, WORD or EXCEL files to your post (up to 5MB). This could include CAD drawings, Material Safety Data Sheets, or other documents to help a responding company evaluate your request.



Create new Listing

- 1 Listing Type
- 2 Basic Information**
- 3 Quantity & Price
- 4 Restrictions
- 5 Contacts
- 6 Dates
- 7 Review
- 8 Success & Distribution

Basic Information

Enter a short description. This will be your listing subject.

0/255

Add a detailed description. Include pertinent details and requirements that potential suppliers may need to know prior to responding to your listing.

0/4095

Would you like to add images or documents to help describe your need?

BROWSE

BROWSE

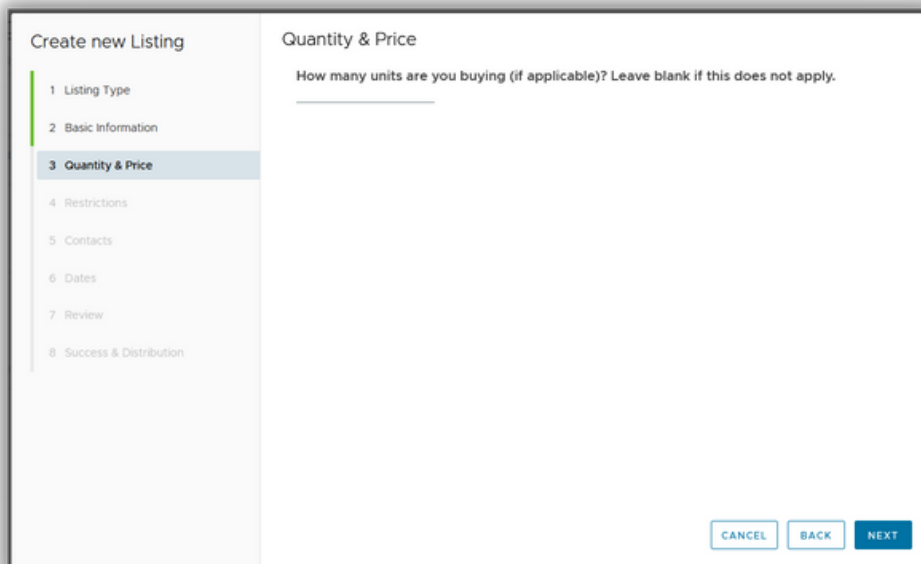
BROWSE

Files can be up to 5MB
Allowed file types are: pdf, jpeg, png, doc, docx, xlsx, txt.

CANCEL BACK NEXT

STEP 5.

Enter the number of units (if applicable).



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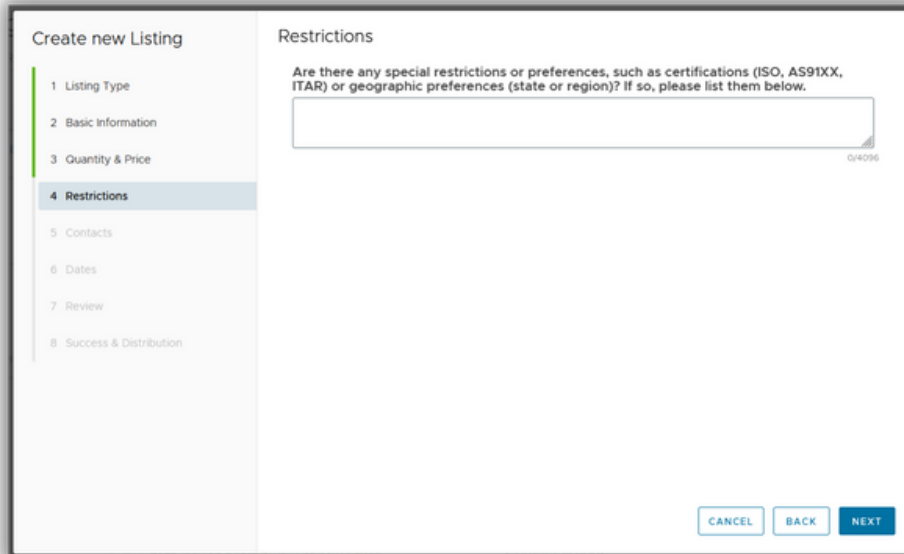
Quantity & Price

How many units are you buying (if applicable)? Leave blank if this does not apply.

CANCEL BACK NEXT

STEP 6.

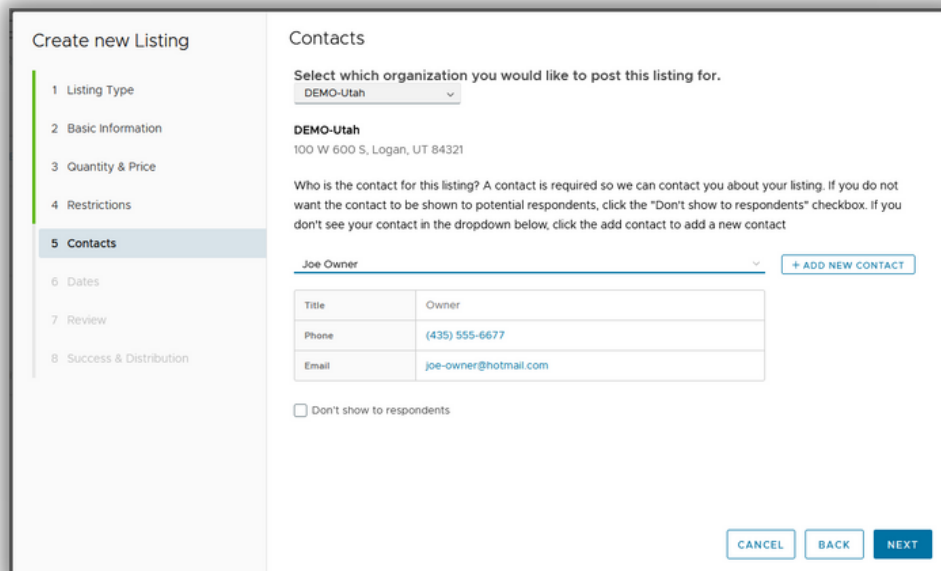
Be prepared to enter any restrictions. This could include things like minimum certification level needed, industry experience, packaging criteria, UL requirements, etc.



The screenshot shows the 'Create new Listing' form at the 'Restrictions' step. On the left is a navigation menu with steps 1 through 8. Step 4, 'Restrictions', is highlighted. The main area contains the heading 'Restrictions' and a text prompt: 'Are there any special restrictions or preferences, such as certifications (ISO, AS91XX, ITAR) or geographic preferences (state or region)? If so, please list them below.' Below the prompt is a large empty text input box. At the bottom right are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

STEP 7.

If you are affiliated with more than one organization, it will ask you (from a drop-down list) to select the organization you are posting on behalf of. If you are only associated with one organization, it will automatically display your facility information. You can select an existing contact, or add one, if you have profile editing rights. You can also decide not to show the company contact person in the listing.



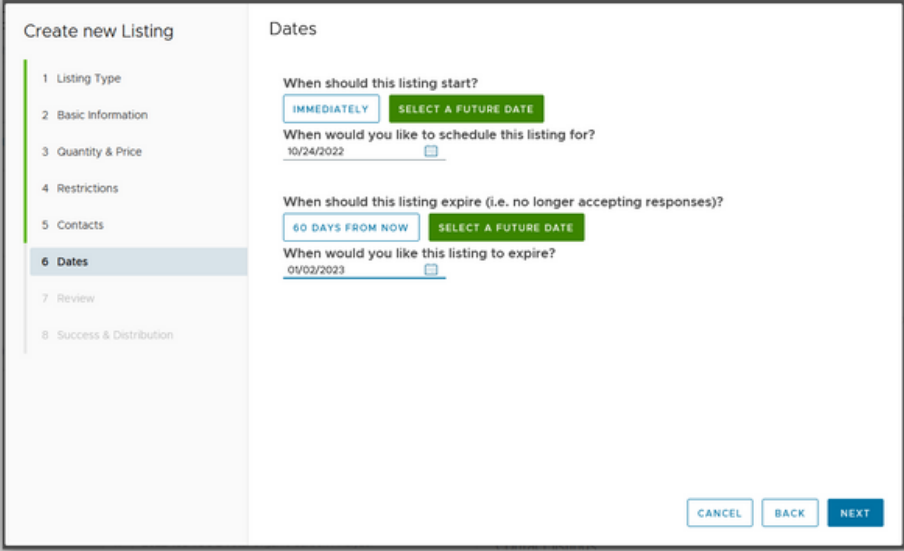
The screenshot shows the 'Create new Listing' form at the 'Contacts' step. The navigation menu on the left highlights step 5, 'Contacts'. The main area is titled 'Contacts' and contains the following elements: a dropdown menu for 'Select which organization you would like to post this listing for.' with 'DEMO-Utah' selected; the organization name 'DEMO-Utah' and address '100 W 600 S, Logan, UT 84321'; a text prompt: 'Who is the contact for this listing? A contact is required so we can contact you about your listing. If you do not want the contact to be shown to potential respondents, click the "Don't show to respondents" checkbox. If you don't see your contact in the dropdown below, click the add contact to add a new contact'; a dropdown menu for 'Joe Owner' with a '+ ADD NEW CONTACT' button; a table with contact details:

Title	Owner
Phone	(435) 555-6677
Email	joe-owner@hotmail.com

 ; and a checkbox labeled 'Don't show to respondents'. At the bottom right are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

STEP 8.

Select the duration of your posting. You can select immediately or a future date. You can also set the end date. The system will allow you to select 60 days or a future date from the calendar.



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Dates

When should this listing start?

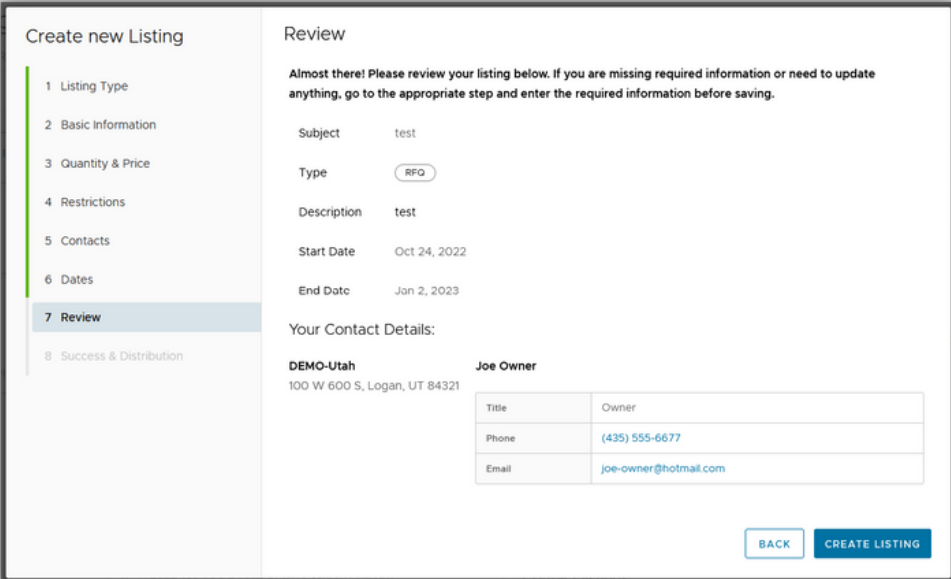
When would you like to schedule this listing for?
 10/24/2022

When should this listing expire (i.e. no longer accepting responses)?

When would you like this listing to expire?
 01/02/2023

STEP 9.

Review your posting, from Subject to End Date, and confirm your contact details. If you are satisfied with your information, click on "Create Listing". If you need to change something, use the back button or select the section you want to update from the left hand side of the posting wizard.



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Review

Almost there! Please review your listing below. If you are missing required information or need to update anything, go to the appropriate step and enter the required information before saving.

Subject test

Type

Description test

Start Date Oct 24, 2022

End Date Jan 2, 2023

Your Contact Details:

DEMO-Utah **Joe Owner**
 100 W 600 S, Logan, UT 84321

Title	Owner
Phone	(435) 555-6677
Email	joe-owner@hotmail.com

STEP 10.

Once you select "Create Listing", it will be live in the system (unless you selected a future date). As the posting organization, you can edit your posting at any time. To see your listing, go to the Exchange Center, select My Listings, and then click "Newest" (if you have multiples). If you selected a future date, like we did in this tutorial, you will need to select "Not Started" for the listing to display. It will only be viewable by you until you edit it to go live, or until the future start date.

Create new Listing

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Success & Distribution

✓ Success

Thank you for posting in the Exchange Center. Now make yourself heard! Let others know of this opportunity by creating a distribution list below. Select and save your criteria, and all eligible CONNEX Marketplace users will receive an email with a link to your listing. If you skip this step now, just go to your listing in the Exchange Center, and you can view and manage your distribution list at any time. If you need help building your list, please contact support.

Build a list for: test

[+ ADD CRITERIA](#)

<input type="checkbox"/>	Category	Values
Add criteria to get started		

Limit to organizations in these state(s):

Previous Distributions

Criteria	Sent On	Sent To
No past distributions found		

[SKIP FOR NOW](#)