

# 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.

A screenshot of the 'Create new Listing' form. The form is divided into two main sections: 'Listing Type' and 'Are you buying or selling?'. The 'Listing Type' section has a sidebar with steps 1 through 8, with step 1 'Listing Type' selected. The 'Are you buying or selling?' section has three buttons: 'NEEDS' (selected with a checkmark and circled in red), 'SURPLUS', and '...'. Below this, the 'Is this an RFI, RFQ, RFP, or Other Need?' section has four buttons: 'RFI', 'RFQ' (selected with a checkmark and circled in red), 'RFP', and 'OTHER'. A red underline is drawn under the 'RFQ' button. At the bottom right, there are two buttons: 'CANCEL' and 'NEXT' (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.

The screenshot shows the 'Create new Listing' form at the 'Basic Information' step. On the left, a sidebar lists steps 1 through 8, with '2 Basic Information' selected. The main content area has a heading 'Basic Information' and two text input fields. The first field is labeled 'Enter a short description. This will be your listing subject.' and has a character count of 0/255. The second field is labeled 'Add a detailed description. Include pertinent details and requirements that potential suppliers may need to know prior to responding to your listing.' and has a character count of 0/4095. Below these fields, there is a question: 'Would you like to add images or documents to help describe your need?' followed by three 'BROWSE' buttons. A note below the buttons states: 'Files can be up to 5MB. Allowed file types are: pdf, jpeg, png, doc, docx, xlsx, txt.' At the bottom right, there are 'CANCEL', 'BACK', and 'NEXT' buttons.

## STEP 5.

Enter the number of units (if applicable).

The screenshot shows the 'Create new Listing' form at the 'Quantity & Price' step. On the left, a sidebar lists steps 1 through 8, with '3 Quantity & Price' selected. The main content area has a heading 'Quantity & Price' and a text input field labeled 'How many units are you buying (if applicable)? Leave blank if this does not apply.' At the bottom right, there are 'CANCEL', 'BACK', and 'NEXT' buttons.

## 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 step 6, 'Restrictions'. On the left is a vertical navigation menu with steps 1 through 8. Step 4, 'Restrictions', is highlighted. The main content area is titled 'Restrictions' and contains the text: '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 this text is a large empty text input field. At the bottom right of the form 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 step 7, 'Contacts'. The left navigation menu highlights step 5, 'Contacts'. The main content area is titled 'Contacts' and contains the text: 'Select which organization you would like to post this listing for.' Below this is a dropdown menu with 'DEMO-Utah' selected. Underneath, the organization name 'DEMO-Utah' and address '100 W 600 S, Logan, UT 84321' are displayed. A paragraph explains the contact requirement: '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'. Below this is a dropdown menu with 'Joe Owner' selected and a '+ ADD NEW CONTACT' button. A table lists contact information:

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

At the bottom, there is a checkbox labeled 'Don't show to respondents' which is currently unchecked. At the bottom right of the form 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.

**Create new Listing**

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

**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.

**Create new Listing**

- 1 Listing Type
- 2 Basic Information
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- 6 Dates
- 7 Review**
- 8 Success & Distribution

**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.

The screenshot shows the 'Success & Distribution' step of the 'Create new Listing' process. The left sidebar lists steps 1 through 8, with '8 Success & Distribution' selected. The main content area is titled 'Success & Distribution' and features a green checkmark icon and the word 'Success'. Below this, a message thanks the user for posting and explains the distribution list feature. A section titled 'Build a list for: test' includes a '+ ADD CRITERIA' button and a table with columns for 'Category' and 'Values'. Below the table is a text input field with the placeholder 'Add criteria to get started'. A dropdown menu is labeled 'Limit to organizations in these state(s):'. The 'Previous Distributions' section contains a table with columns for 'Criteria', 'Sent On', and 'Sent To', with the message 'No past distributions found' below it. A 'SKIP FOR NOW' link is located at the bottom right of the page.

Category	Values
Add criteria to get started	

Criteria	Sent On	Sent To
No past distributions found		