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.

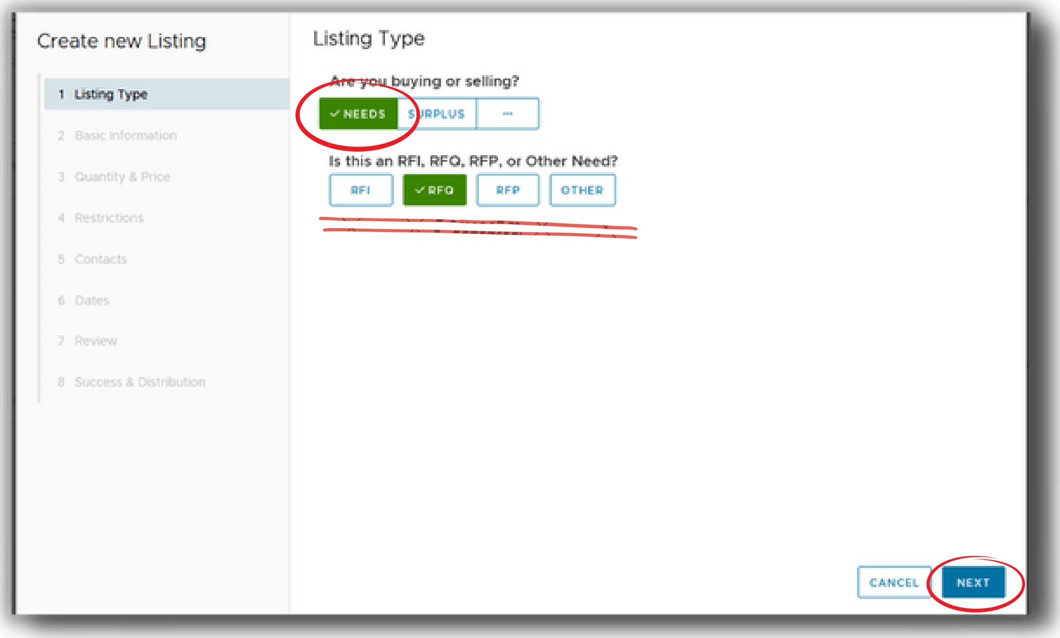
Log in to the CONNEX platform

STEP 2.

Select Exchange Center and click on +Add Listing

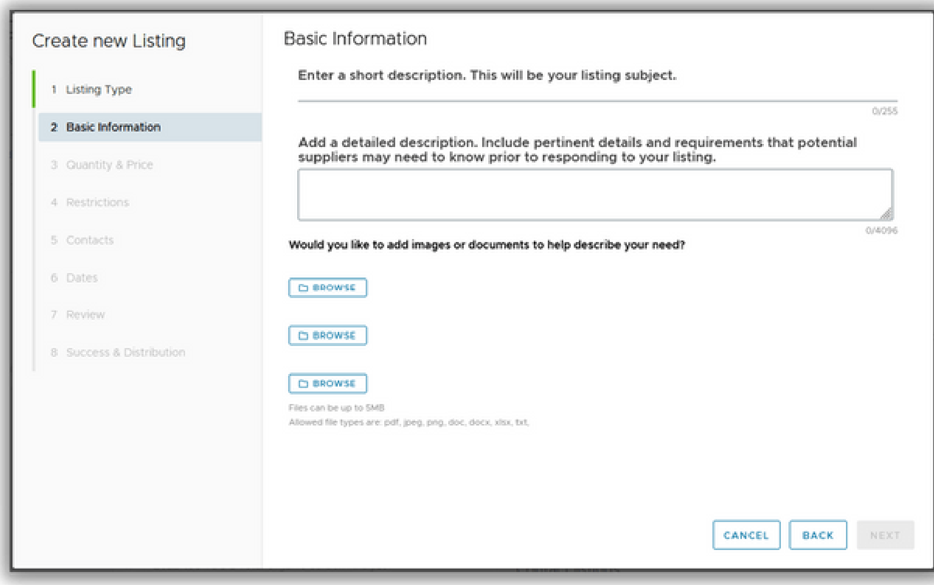
STEP 3.

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



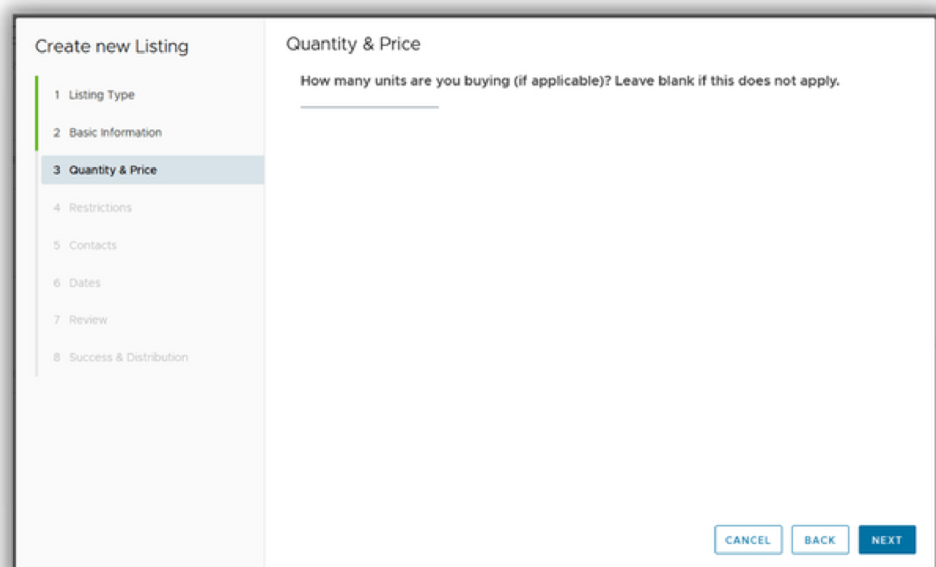
STEP 4.

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.



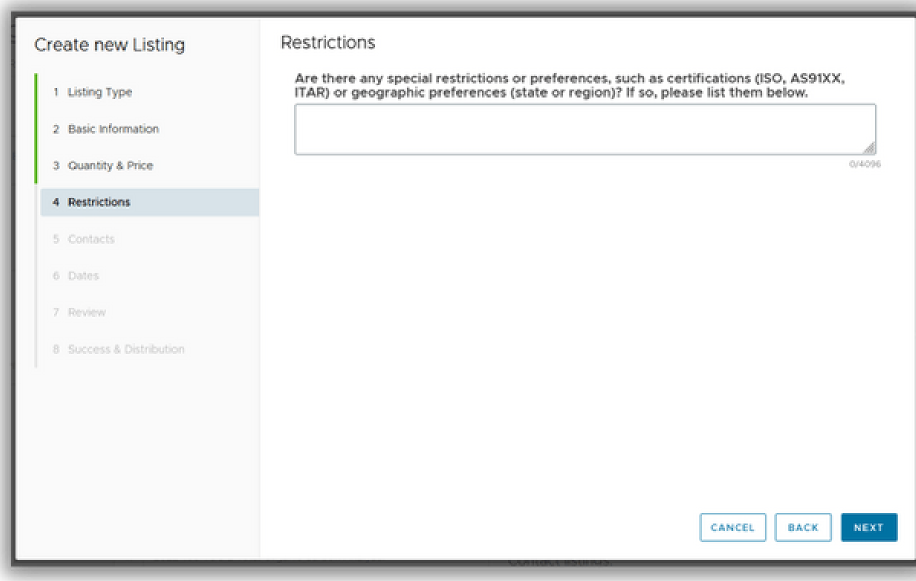
STEP 5.

Enter the number of units (if applicable).



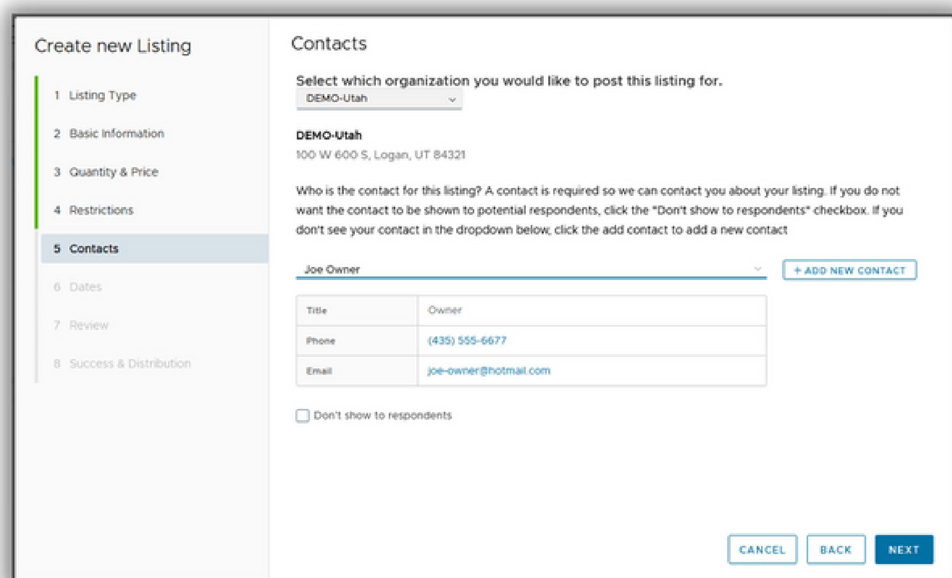
STEP 6.

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



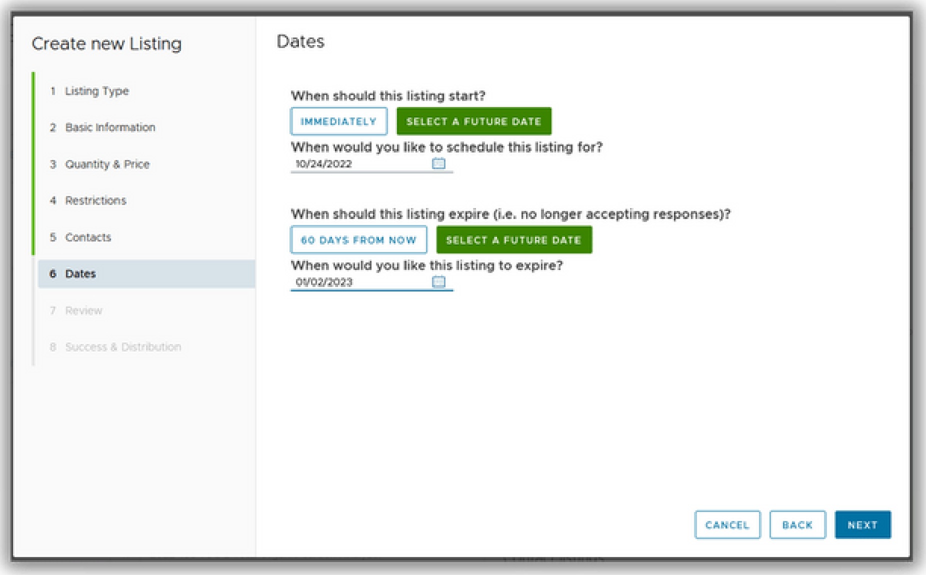
STEP 7.

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.



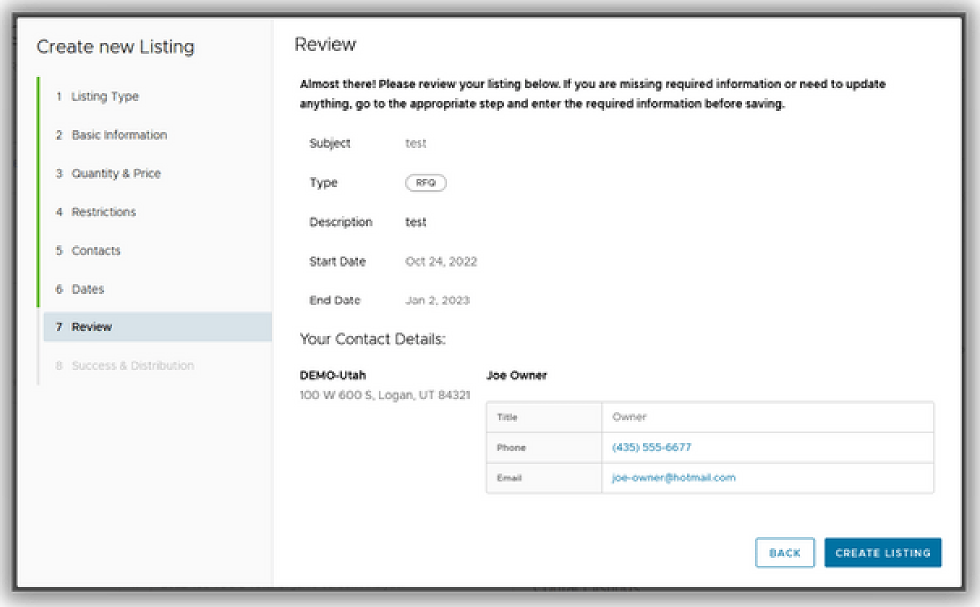
STEP 8.

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.



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.



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.