

Exchange Center listings are RFIs, RFQs or RFPs posted within CONNEX Marketplace. These are typically posted by a buyer looking for a supplier who can meet their needs.

### STEP 1.

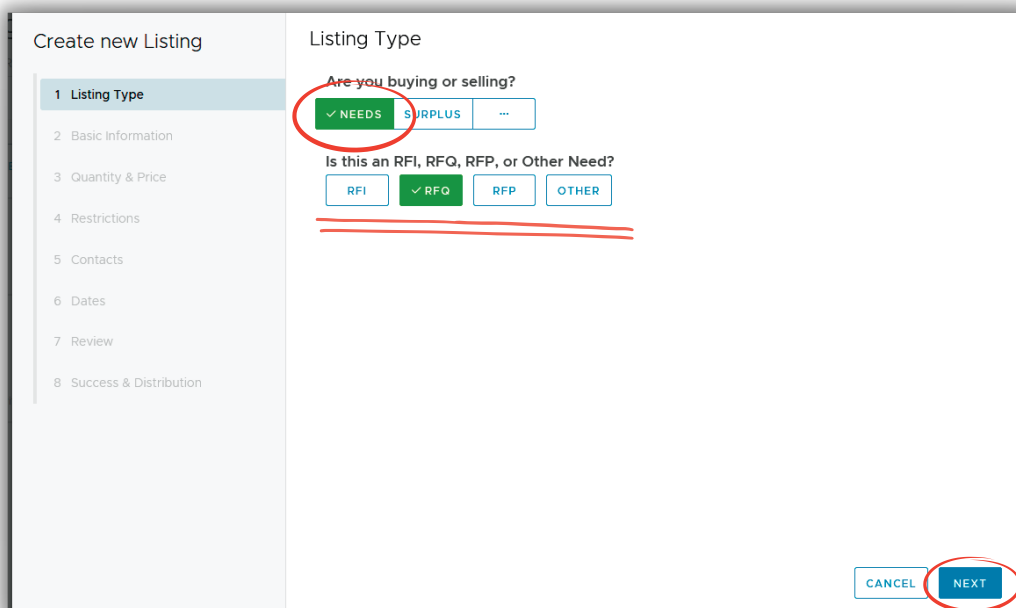
Log in to CONNEX using your username and password.

### STEP 2.

Select Exchange Center and click on +Add Listing.

### STEP 3.

Select the Needs to bring up the RFI, RFP or RFQ options. Select one to activate the Next button.



The screenshot shows the 'Create new Listing' form. On the left is a sidebar with a list of steps: 1 Listing Type, 2 Basic Information, 3 Quantity & Price, 4 Restrictions, 5 Contacts, 6 Dates, 7 Review, and 8 Success & Distribution. The main content 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 highlighted with a red circle.

## 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 listing is distributed. You can add PDF, JPG, PNG, WORD or EXCEL files—such as CAD drawings or Material Safety Data Sheets—to your listing (up to 5MB).

The screenshot shows the 'Create new Listing' interface. On the left is a vertical navigation menu with steps 1 through 8. Step 2, 'Basic Information', is highlighted. The main content area is titled 'Basic Information' and contains the following elements:

- A text input field with the prompt: "Enter a short description. This will be your listing subject." and a character count of 0/255.
- A larger text input field with the prompt: "Add a detailed description. Include pertinent details and requirements that potential suppliers may need to know prior to responding to your listing." and a character count of 0/4096.
- A question: "Would you like to add images or documents to help describe your need?"
- Three "BROWSE" buttons stacked vertically.
- Text: "Files can be up to 5MB" and "Allowed file types are: pdf, jpeg, png, doc, docx, xlsx, txt."
- At the bottom right are three buttons: "CANCEL", "BACK", and "NEXT".

## STEP 5.

Enter the number of units (if applicable).

The screenshot shows the 'Create new Listing' interface. On the left is a vertical navigation menu with steps 1 through 8. Step 3, 'Quantity & Price', is highlighted. The main content area is titled 'Quantity & Price' and contains the following elements:

- A text input field with the prompt: "How many units are you buying (if applicable)? Leave blank if this does not apply."
- At the bottom right are three buttons: "CANCEL", "BACK", and "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 a web form titled "Create new Listing" with a sidebar menu on the left containing 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 company, the site 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, if you have profile editing rights, add a new contact. You can also decide not to show the company contact person in the listing.

The screenshot shows a web form titled "Create new Listing" with a sidebar menu on the left containing steps 1 through 8. Step 5, "Contacts", is highlighted. 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. The text continues: "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 another dropdown menu with "Joe Owner" selected and a "+ ADD NEW CONTACT" button. A table with contact information is shown:

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

Below the table is a checkbox labeled "Don't show to respondents". At the bottom right of the form are three buttons: "CANCEL", "BACK", and "NEXT".

## STEP 8.

Select the duration of your listing. You can choose to have it post immediately or on a future date. You can also set an end date for your listing. The system will allow you to end the listing after 60 days or a choose a future date from the calendar to end your listing.

The screenshot shows the 'Dates' step of the 'Create new Listing' process. On the left is a navigation menu with steps 1 through 8, with '6 Dates' selected. The main content area is titled 'Dates' and contains three questions:

- When should this listing start?** with options 'IMMEDIATELY' and 'SELECT A FUTURE DATE'.
- When would you like to schedule this listing for?** with a date input field showing '10/24/2022' and a calendar icon.
- When should this listing expire (i.e. no longer accepting responses)?** with options '60 DAYS FROM NOW' and 'SELECT A FUTURE DATE'.
- When would you like this listing to expire?** with a date input field showing '01/02/2023' and a calendar icon.

At the bottom right are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

## STEP 9.

Review the details of your listing, from Subject to End Date, and confirm your contact details. If you are satisfied that everything is correct, click on "Create Listing." If you need to change something, use the Back button or select the section you want to update from the menu on the left hand side.

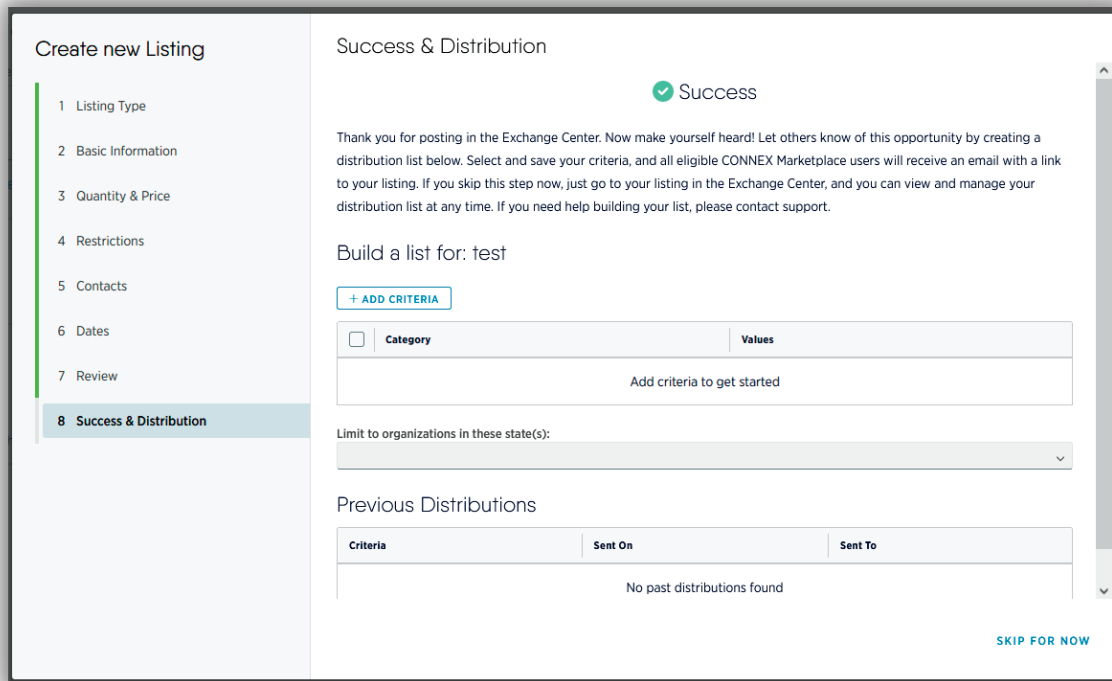
The screenshot shows the 'Review' step of the 'Create new Listing' process. On the left is a navigation menu with steps 1 through 8, with '7 Review' selected. The main content area is titled 'Review' and contains the following information:

- A warning message: "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."
- Listing details:
  - Subject: test
  - Type: RFO
  - Description: test
  - Start Date: Oct 24, 2022
  - End Date: Jan 2, 2023
- Contact details:
  - Your Contact Details: DEMO-Utah, 100 W 600 S, Logan, UT 84321
  - Joe Owner
  - Title: Owner
  - Phone: (435) 555-6677
  - Email: joe-owner@hotmail.com

At the bottom right are two buttons: 'BACK' and 'CREATE LISTING'.

## STEP 10.

Once you select "Create Listing," it will be live in the system (unless you selected for it to post on a future date). You can edit your listing at any time. To see your listing, go to the Exchange Center, select My Listings, and then click "Newest" (if you have multiple listings). If you selected a future date as shown in this tutorial, you will need to select "Not Started" for the listing to display. The listing will only be viewable by you until you edit it to go live, or until the future start date.



### Create new Listing

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

### 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](#)