

CONNEX TUTORIAL

Setting Up Your CONNEX Profile



Welcome to CONNEX Marketplace! Thank you for setting up an account in this powerful tool that connects regional and national supply chains, empowers manufacturers to find and be found and identify new business opportunities.

To get the most out of CONNEX Marketplace, it is essential that you fully complete your company profile and capability statement. When a buyer searches for a new supplier to meet their needs, the CONNEX algorithm filters through 140,000+ company profiles and ranks them according to how closely the company's capabilities match the buyer's needs. Those with a strong match will appear at the top of the search results and get notified of buyers needs first. Therefore, the amount of new business opportunity notifications you receive, and where your company ranks in search results, is directly related to the completeness of your profile. You may offer the exact services that a buyer is looking for, but unless your profile is fully complete, they may not find you.

This welcome packet is designed to guide through the company profile setup process (after your new account is approved and activated). Because it's best to complete this all in one setting, the following pages contain information and documentation that you will want to have ready before you start. It also contains a sample capability statement that you can create and upload during the profile process. After gathering the information, you can then build out your profile by logging into the CONNEX app and selecting "Edit Profile" within the "My Organization" page.

As you read through this, if you notice that there is information you don't yet have, we recommend that you still go ahead and upload as much of your capability information and documentation that you currently have. You can then go back and enter additional information when you have it.

If you have any questions, or need assistance, please reach out to us at:
support@connexmarketplace.com or visit the tutorial guide at:
<https://connexmarketplace.com/tutorials/>

Gather Your Profile Information

Now that your account is approved and you're logged in, it's time to complete your profile.

Below is a checklist of information to gather before you begin. This will allow you to complete your profile all in one setting.



GENERAL COMPANY INFORMATION

- **Company Bio/Description:** This should be one or two paragraphs generally describing what you do. This will be the first thing others see about you and should be a concise overview of your company, what it does and brief capabilities. Differentiators here are very important in order to stand out and entice the viewer to click and open your full profile.
- **Company Social Media Links**
- **Logo (.jpg or .png ; 1 Mb or less in size)**
- **Header Image:** This is an image that will be displayed across the top of your profile page. This is not mandatory but it can help grab the buyers attention and make you stand out. The recommended size for this banner is: 1600px x 700px (.jpg or .png ; 15 Mb or less in size)



SIC & NAICS CODES

- **Gather all applicable SIC Codes**
- **Gather all applicable NAICS Codes (<https://www.naics.com/search>).** Your NAICS codes should match those from your Dun and Bradstreet data. You can look your D&B data here: <https://www.dnb.com/duns-number/lookup.html>



PRODUCTS YOU OFFER

- Product Name
- Product Description (optional)
- UPC (optional)
- Product Attachment (.png .jpg .pdf ; 5 Mb or less per attachment)



SERVICES YOU OFFER

- Service Name
- Service Description (optional)
- Service Attachment (.png .jpg .pdf ; 5 Mb or less per attachment)



YOUR CAPABILITIES

- **Capability Statement:** Upload your existing capability statement(s) or create one using the sample statement at the end of this packet as a guide. (It is highly recommended to upload a PDF with selectable text. This will ensure that the actual text within your capability statement will be indexed within the CONNEX algorithms and help buyers find you based on that text. A .png, .jpg or other basic image of a capability statement will not be indexed and therefore will not help your search rankings.)
- **Manufacturing Processes:** Gather a descriptive list of all your processes such as: casting, joining, machining, grinding, honing, shearing etc. You will be asked to click the boxes of all relevant processes along with entering any "other" processes not on the list.
- **Materials:** Gather a list of all manufacturing materials that your company uses, produces, and/or distributes such as: bronze, additives, honeycomb, carbon fiber, etc.



YOUR CAPABILITIES (CONT.)

- Equipment: Gather a descriptive list of all your equipment such as: clean rooms, autoclaves, dryers, freezers, compressors etc. You will be asked to check the boxes of all relevant equipment, along with entering any "other" processes not on the list including equipment description, brand and model. (Optional equipment characteristics & specifications may also be added if desired.)
- Certifications: Gather a list of your company certifications such as: ISO, AS9100, NADCAP, HAACP, FDA PMA, etc. Include the effective date and expiration date of each, along with the PDFs or images of the actual certification.



PHOTO/VIDEO GALLERY

- Gather any additional photos or videos that will help convince buyers of your unique products, capabilities, processes, machines, etc.
- Images can be .png or .jpeg of 1 Mb or less per image.
- Videos should be links to any of your company's YouTube or Vimeo videos etc. You will have the ability to paste the video URLs into this section.



COMPANY CONTACTS

- Gather a list of all contacts that you want to add to the contact section of your profile. These names will be displayed to any buyer that wants to contact you for more information. Include the contacts name, title, email and phone number.

SAMPLE CAPABILITY STATEMENT
[Click Here to Download Blank Form That You Can Edit](#)

Company
Logo

COMPANY NAME

CONTACT	BUSINESS SUMMARY
Primary Contact Name Primary Contact Title Primary Contact Number Name@CompanyName.com www.YourCompanyURL.com	Think of this page as a resume for your business. Use this Business Summary to provide a brief explanation of your company's key focus area. You may include a brief history as well, accreditation's or awards
ADDRESS	KEY COMPETENCIES
Your Company Name Your Street Address Your City, State, Zip	<ul style="list-style-type: none"> • List competencies in a bullet format, or in a brief paragraph. • List or describe your company's specialized areas of expertise. • Make sure to include any unique areas of focus or special markets you work in. • Include unique techniques and approaches used to perform work including any state-of-the-art equipment or capabilities that are part of your business.
IDENTIFICATION	FACILITIES & EQUIPMENT
<ul style="list-style-type: none"> • Primary NAICS Code: 9999999 • Secondary NAICS Code: 9999999 • DUNS Number: 99999 • Cage Code: 9999999 	<ul style="list-style-type: none"> • List all of your company's locations and facilities: • List Geographical coverage - do you serve the US? International Clients? • List equipment, and special accompanying certifications. <ul style="list-style-type: none"> ◦ Ex: 5-Axis CNC Lathe ◦ Ex: Laser Welding Equipment ◦ Ex: CWI on Staff?
CERTIFICATIONS	EXPERTISE
<ul style="list-style-type: none"> • List any certifications you have in this box. • Examples include: ISO, ITAR Registration, FDA, GMP, ASME, etc • List any SBA Designations such as Women Owned, Veteran Owned, etc. 	A brief summary of your expertise, as well as that of your key personnel/staff, highlighting their education and technical experience as it relates to your business.
CUSTOMERS	UNIQUE CAPABILITIES OR RESOURCES
<ul style="list-style-type: none"> • List any notable customers in this section. Ex: Boeing • "You may also provide positive customer reviews here." 	Briefly describe any unique capabilities you offer that can differentiate you from others

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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 content area is titled 'Listing Type' and contains the question 'Are you buying or selling?' with three buttons: 'NEEDS' (checked), 'SURPLUS', and '...'. Below this is the question 'Is this an RFI, RFQ, RFP, or Other Need?' with four buttons: 'RFI', 'RFQ' (checked), 'RFP', and 'OTHER'. A red circle highlights the 'NEEDS' button, and another red circle highlights the 'NEXT' button at the bottom right. A red underline is drawn under the 'RFQ' button.