Connexus Navigation Guidance (for Service Providers)

Congratulations, you have successfully registered to Connexus as a Service Provider. Let's start with the basic information for your first steps within Connexus.

- **Get started: Setting up your account**

  Start by creating your account in Stripe, a global financial service company that offers payment processing for e-commerce and handles all the payments in Connexus.

  Within the menu "My Organization / Billing & Payment / Client payments", available from your email address (top menu, right side), create first an account in Stripe by following their requirements. In this video , we show you how it works step-by-step.

  You are an academic or public institution? Stripe offers a specific solution for non-profit organizations. Please check this video and follow the new steps.

  After finalizing the Stripe account creation, verify your data in the Connexus platform "My Organization / Billing & Payment / Client payments". It will bring you back to Stripe for a final account validation. This validation process will take some minutes. You can verify that your account has been successfully created within the Stripe menu "Customers/Connect". Once the final account setup is confirmed, Stripe will notify you via email.

  Add your payment method at "My Organization / Billing & Payment / Payment methods". Choose between credit card (Connexus accepts most major credit cards as well as various debit cards supported by Stripe) and bank transfer/direct debit.

- **Add an instrument**

  Click on "Instruments" in the top menu to add a new instrument.

  Select the technique, type, and magnetic field of your instrument. In order to make your instrument operational, register it for free with Connexus in the next step.

  In case you need to register an instrument that is not available on the Connexus platform, send an email to support@connexus.bruker.com with a specific description of the desired instrument.

- **Edit your company**

  Within the menu "My Organization", available from your email address (top menu, right), you will see an overview of all information that refers to your company.

Your company name

Apart from the company information you already fulfilled during the registration, you can select the "Certifications" that apply to your lab. Just type to search for your certifications.

Edit Service-related settings

Within the menu "Service-related settings" below "Billing & payment" you can define the following settings:

- **Capacity** as available number of hours of service per week
- **Sample preparation** service available
- **Solvents** available for sample preparation
- **Consulting services** available
- **Spectrum interpretation** service available

- **Add a service**

Click on "Services" in the top menu to add a new service offered on your instrument.
Enter related details such as technique, service type, samples per hour, minimum sample quantity, service price per hour, and acquisition time.

You can also select the certifications that are relevant to your service from the list you already provided within the "My Organization" menu. In case you offer solvent addition for this service, solvents can be selected on the "Pricing" tab from the list in the "My Organization" menu. You must click on the "+" icon to add each solvent.

The service status can be set on/off, so that you can deactivate a service not offered at a given time.

In case you need to register a service that is not available on the Connexus platform, please send an email to support@connexus.bruker.com with a specific description of the desired service.

- **Validate an order**

After a client has placed an order, please revise it. Only after you accept the order will the order process begin.
The platform guides you through the process. Please always follow the alert notification icon with the red mark.

- **Create a quote (based on submitted New Opportunity)**

If clients need to book a service that is currently not available on the Connexus platform, or if they want to check offers from several service providers before ordering, they will submit an opportunity with their requirements.

Version September 2024

Operational service providers will receive a mail from the platform informing about this new opportunity, which will also be available in the platform within the Opportunities menu.

There are 5 steps to follow to create a quote

1. Opportunity
2. Quote
3. Services
4. Agreements
5. Submission

Click on "NEXT" within the dark blue navigation bar to proceed after each step.

1. **Opportunity**
   Check the open opportunity with the details submitted by the client like description of the requested services, lead time, samples, agreements or shipping solution.

2. **Quote**
   Provide a description of your quote and the expected lead time for the analysis.

3. **Services**
   Check the services requested by the client and use the "Add Service" button to quote services you can run for each individual sample.

4. **Agreements**
   Review the documentation provided by the client. You can also add your own agreement (non-disclosure agreement or Terms & Conditions).

5. **Submission**
   Check the components of your quote. Now you can submit your quote for this new opportunity to the client.

The client can now accept your quote, reject it or send a message for clarification/discussion via the "Discussion" area at the bottom of the quote overview in the right-hand window. In this area, you can also discuss any topics about the quote with the client who requested the quote.

If your quote has been accepted, you need to confirm the order within the "Action to perform" menu (please see above under "Validate an Order").

6. **Package delivery confirmation**
   Once the client sends the samples, please check the delivery and confirm. Follow the red alert to confirm first "package is received" and in a second alert to "revise and confirm condition of samples".

7. Start the analysis

After you confirm having received the samples and the order has been paid by the client, you can start the analysis of the samples. Click on "Orders" in the top menu. Within the menu "Action to perform" change the action to "Started analysis".

Edit the request
To edit the request, change the status from "new" to "open" and select the (Analysis) Manager.

Now assign the analysis by selecting the same user selected as manager in the previous step.

Edit the analysis
By selecting the "Service" you can review the details about the requirements and sample.

You can now edit the analysis in the top right menu. Keep the status on "Assigned" for now and complete all fields, incl. Result and Start and End of analysis.

Upload the results
To upload the result analysis, select the corresponding "Service" as in the previous step and use the upload function at the top of the right menu window.
First accept the **Export control certification** statement. Now you can upload the analysis file.

To confirm the analysis is done, click on the corresponding "Service" again and now change the status of the analysis to "completed". Repeat the related analysis management steps to complete each service in case there is more than one service in one order.

Approve the analysis
Select the corresponding "Service" one more time and click on the "thumb up" icon in the right menu to change the analysis status from "completed" to "approved".

8. Provide feedback about the client

Your feedback is essential, helping clients to choose the service provider wisely and enabling other service providers to open their labs with confidence.
The client will be requested to evaluate your service. To close the order, please review the client.

For closing the transaction, rate "the whole order" and provide star ratings. You also have the possibility to rate the shipping process. Here you just need to repeat this feedback process.