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1 Introduction
The General Services Administration (GSA), Federal Acquisition Service (FAS), Office of Enterprise Technology Solutions (ETS) created the Enterprise Infrastructure Solutions (EIS) program to provide an acquisition vehicle for Agency customers across the Federal Government and other eligible users, to acquire simple to complex telecommunications and networking infrastructure services from commercial vendors, also known as contractors or suppliers. This Ordering Guide (OG) provides an overview of ordering and related processes. The subsequent information is not intended to be used as a stand-alone reference, and this document will discuss multiple other sources as well as their use. The reader is encouraged to review and become familiar with all documentation referenced in this ordering guide. This includes the Service Order (SO) training in Conexus.

1.1 Purpose
The EIS OG focuses on providing Agency users with a detailed list of resources and information available to process Service Orders following award of EIS task orders.

1.2 Intended Users
This OG is intended for Agency Ordering Contracting Officers (OCO) and Contracting Officer Representatives (COR).

2 Background of the EIS Contract
EIS is a multiple award, Indefinite Delivery Indefinite Quantity (IDIQ), Task Order (TO), contract vehicle. A TO is the official contractual mechanism Agencies use to order services under EIS. All task orders are subject to fair opportunity as defined in Federal Acquisition Regulation (FAR) 16.505. An Agency OCO selects a vendor, awards TOs, and initiates SOs. Agencies are directly billed and manage their own services throughout the lifecycle of the TO.

The EIS contracts comprehensively address federal Agencies’ requirements for telecommunications and information technology infrastructure. EIS is the follow-on acquisition vehicle for Networx, Washington Interagency Telecommunications System (WITS) 3, GSA’s Regional local service contracts, and other current telecommunications contracts. EIS contracts were awarded on July 31, 2017, with a period of performance of 15 years (inclusive of all option periods).

3 EIS Ordering Overview
Only Agency OCOs or authorized officials, appointed by the OCO, are allowed to place SOs for EIS services. Agency OCOs with a Delegation of Procurement Authority (DPA) from GSA, may appoint CORs or other Agency officials (consistent with Agency rules) to place SOs under a TO and assist with the administration of SOs. The COR, if appointed, is responsible for complying with the terms and conditions of the TO and with any rules, regulations, and conditions promulgated and enforced by its Agency.
The vendor will only accept SOs from authorized Agency personnel and only for services included in the TO. Any other SOs submitted will result in the order being rejected by the vendor.

3.1 Overview of Conexus

Conexus is a system that handles the setup of telecommunications services, and accommodates ordering, inventory, and billing. It is a modular system developed by GSA and supports the Enterprise Infrastructure Solutions (EIS) contract. Conexus includes major application components such as Orders, Billing, Agencies, and Reports. It allows users to use one consolidated system rather than accessing multiple systems separately.

The Conexus Orders component allows approved users to place telecom orders with vendors participating in the Enterprise Infrastructure Solutions (EIS) contract. Using the Orders component, users can also search for and view orders, and modify orders and services for the Agency or Agencies they have permissions for.

Conexus inventory management helps Agencies effectively track and monitor inventory. Conexus billing gives Agencies full visibility into monthly costs for services. If billing mistakes are found, the resolution process allows for disputes to be handled and for reconciliation of costs to be accurately reflected in subsequent billing statements.

Pass Through orders are created in Conexus to place service orders with vendors. Vendors approved to accept orders through Conexus can be found on the EIS Interact site in the Conexus On-Boarding List https://interact.gsa.gov/node/467476. The list is updated as vendors are approved.

3.2 Alternatives to Conexus

Agencies may not be able to or may choose not to use Conexus to process SOs. One of the biggest reasons for this would be that the Agency selected vendor is not able to accept SOs in Conexus. Obtaining Conexus approval can occasionally be a lengthy process and has the potential to delay transition to EIS. Another alternative to Conexus would be if Agencies have internal applications/systems that can handle EIS and other Agency contract ordering requirements. These internal applications/systems may make more sense for Agency ordering needs.

Agencies that choose an alternative ordering process will be submitting Direct Orders that are placed through the vendor’s ordering system or via email. It is important for Agencies to understand that Conexus only provides minimal reporting and information for these direct orders as this information is housed in the vendor’s systems. Conexus receives information regarding the order from the vendor once the Service Order Completion Notice (SOCN) is provided by the vendor. Direct orders are easily identified as their identifier is based on the following format: DirectYYYYMMDDTime.

* NOTE that once orders are placed through the vendor’s ordering system or email, Agencies must track and manage the ordering process through disconnect outside of
Conexus. There is no option to supplement, cancel, change, or disconnect in Conexus once they have been ordered through the vendor.

3.3 Conexus Ordering
Pass through SOs are initiated and managed through Conexus. There are many benefits for Agencies in using Conexus to process SOs. The subsequent sections discuss the benefits of using Conexus as well as how to access available Conexus and training resources.

3.3.1 Benefits of Using Conexus
There are many benefits to the Agencies in using Conexus to process SOs. These benefits include lifetime management of the SO and reporting. Additional benefits include:

- Manage SOs from initiation to SOCN.
- Track the progress of orders and the associated services.
- Manage Modifications and Change Orders through Conexus. Users can:
  - Modify or delete orders that haven’t yet been submitted to the vendor.
  - Cancel orders that have been submitted to the vendor in accordance with EIS contract Section G.3.3.2.3.1.
  - Supplement/update orders that have been submitted to the vendor in accordance with EIS contract Section G.3.3.2.3.
  - Change services that have been delivered by the vendor.
  - Disconnect services that have been delivered by the vendor.
  - Fix and resubmit an order rejected by the vendor.
- Conexus will validate SOs against TO for the Agency prior to submission of the SO.
  - Conexus uses information provided by the EIS vendors to validate SO requirements.
  - Conexus will not accept a SO that does not match the TO requirements provided.
  - TOs are between the Agency and the EIS vendor. Conexus does not know what is in the TO and therefore relies on the information provided by the EIS vendors.
  - For Direct Orders, Conexus will not accept a SOCN if the TO information is not correctly provided by the EIS vendor.
- Conexus adds Auto Sold CLINs to an SO based on parent CLINs. The pricing for the CLIN will also be included by Conexus.
- Following SOCN, services are tracked and managed through Conexus through disconnect/termination.
- Conexus provides invoice accrual information to Agencies based on inventory. This helps with task order planning and funding.
- Conexus provides reporting on SOs from initiation to completion of the SO as well as tracking the service/CLINs through the life of the TO.

3.3.2 Conexus Web Addresses
Pass through orders are processed through Conexus. There are two different Conexus environments. The first is the Cert (test) environment at https://conexus-cert.gsa.gov/. It is recommended that readers begin with training in the Cert environment to understand how Conexus works. You can tell you are in the Cert environment if it has a RED banner at the top (see Figure 2). More details on the Conexus training modules will be addressed below in 3.3.4.
The second is the Live Conexus environment at https://conexus.gsa.gov/. Users will notice this has a BLUE banner at the top. In order to access both the Cert and Live Conexus environment, users must have a login and permissions which are addressed in the next section 3.3.3.

### 3.3.3 Conexus Login

An Agency must have an assigned Agency Administrator (AA) before any Agency CO, COR or designated representatives can login and use Conexus. AAs are assigned by Conexus at the Agency level and can see all Agency task orders awarded on EIS. If you do not know who your AA is, please contact conexus.help@gsa.gov.

Users have only one Conexus login account for both Cert (test) and Prod (live), and it will be associated with a specific email address. Access to a user’s Conexus account is available in two different ways:

- A PIV/CAC account
- A User ID and Password

Below is an example of the authentication login page layout.

Conexus provides a generic training account for the Cert environment. This login can be used to complete Conexus training and to enter test transactions to better understand how the system works following training.

Once you have a Conexus login (via PIV/CAC or User ID/Password) and you have been assigned permissions to enter Service Orders (SO) you are ready to begin.

Conexus has several training videos available including three videos dedicated to Ordering. These videos can be found at https://conexus-cert.gsa.gov/ under the Help menu next to your name (top right). There are also additional Help topics to assist new users including Help
Getting Started, Inventory, Billing, Reporting and more. See Figure 1 below to see the Conexus Help menu in the Cert environment.

Figure 1: Conexus Help Menu

3.3.4 Conexus Training
Conexus has several training videos available including three videos dedicated to Ordering. These videos can be found at https://conexus-cert.gsa.gov/ under the Help menu next to your name (top right).

Figure 2: Conexus Cert Home Page
Figures 3, 4 and 5 show the Conexus Training catalog. Each training includes a detailed Power Point presentation including screen shots and instructions. A brief description of each training topic will be provided.

Figure 3: Conexus Training: Getting Started; User Administration; Agency Preparation

Figure 4: Conexus Training: Ordering Overview; Create Install Order; Update Orders
3.3.4.1 Conexus Training: Getting Started
This is the first in a series of trainings which explain and demonstrate the features of Conexus.

Training covers background information including:
- What is Conexus?
- Existing functionality and methodologies that are in use for managing telecom orders
- A brief look at the primary Conexus components
- And an introduction to roles and scope

Training also covers the application user interface:
- Registering as a new user
- Logging in and out
- Fundamental tips on the interface such as navigating, and styles and standards users will encounter

3.3.4.2 Conexus Training: User Administration
User Administration Training is designed to help Agency Administrators understand their role and responsibilities in administering Conexus access for their Agency.

Agency Administrator responsibilities include:
- Approve only valid Agency account requests from federal employees and valid vendors within your Agency.
- Ensure understanding of all actions taken under my privileged account and that the exploitation of this account would result in negative impacts.
- Use the special privileges granted to perform authorized or business related functions.
- Maintain your privileged account based on password requirements and do not share password information with any other users.
- Limit the scope of permissions for each user based on least privileged access.
- Perform an annual audit on Agency users to ensure that access is still required.
- Inform the Conexus system owner of any Agency administrators that no longer require the Agency administrator role.

User Administration Training will provide Agency Administrators with training for:
- User Registration
- User Management
  - Processing Pending Users
  - User Profiles
  - Task Orders
  - AHCs
- User Groups (roles) and Agencies (scope)
- Permissions granted by each user group
- Assigning User Groups and Agencies
- Deactivating and Reactivating Users

3.3.4.3 Conexus Training: Agency Preparation
Agency Preparation (AP) training focuses on Agency topics around preparations for placing service orders, and also covers a related short topic, Contracts in Conexus. The training is intended for all Agency user groups.

The Agencies component in Conexus allows users with appropriate permissions to view, and in some cases edit, details in the areas listed here about the Agency or Agencies the user has scope for. This training will cover Agency Hierarchy Codes (AHCs), Locations, Task Orders, Fees, and AP Task Order Funding.

3.3.4.4 Conexus Training: Ordering Overview
The purpose of this training is to familiarize users with the Conexus Orders component. The training is intended for Agency users who will be involved in creating or otherwise working with telecom orders managed in Conexus.

Training starts with a brief introduction to the Conexus service ordering component. The various types of Conexus orders are discussed, and attendees learn about how to use the filters and other Conexus features to search orders and view order details. The various order status options are discussed and defined.

User permissions are also discussed so that users understand what they can/cannot access relating to service orders based on their role in Conexus.

A demonstration in Conexus of the various concepts covered throughout the training is presented at the end of the training video. If the user has their Conexus account set up, they can follow along and re-create the same steps.
3.3.4.5 Conexus Training: Create Install Order (Currently known as Service Orders)
This training course provides additional information on creating Service Orders in Conexus. The training is intended primarily for Agency users who will be involved in creating telecom orders managed in Conexus.

The training reviews the permissions and prior setup that are required before creating a service order, and users are given tips on how to track an order once it’s been created. The majority of this training is spent going through the detailed steps involved in creating a service order.

A demonstration in Conexus of the various concepts covered throughout the training is presented at the end of the training video. If the user has their Conexus account set up, they can follow along and re-create the same steps.

3.3.4.6 Conexus Training: Update Orders
The Create Install Order training covers creating new service orders for telecom services. This training looks at what options are available to make changes after an order has been submitted. The training is intended primarily for Agency users who will be involved in creating orders managed in Conexus.

Supplement and Cancel orders in Conexus are orders that can be created in conjunction with Install orders that have been submitted, but whose services have not yet been delivered. Change and Disconnect orders are orders that can be created in conjunction with services that have been delivered. All will be addressed in this training.

A demonstration in Conexus of the various concepts covered throughout the training is presented at the end of the training video. If the user has their Conexus account set up, they can follow along and re-create the same steps.

3.3.4.7 Conexus Training: Inventory
The Conexus Inventory component allows users to search and view information on active and inactive services that were ordered using Conexus, or for orders placed directly with the vendor and whose information has been uploaded to Conexus. Inactive services are those that are not actively billing but could be turned on and therefore become active services.

The purpose of this training is to familiarize users with the Conexus Inventory component. The training is intended for Agency users who will be working with telecom orders managed in Conexus.

Training will start with an introduction to the inventory component, and then look at the view, search, and download features.

A demonstration in Conexus of the various concepts covered throughout the training is presented at the end of the training video. If the user has their Conexus account set up, they can follow along and re-create the same steps.
3.3.4.8 Conexus Training: Billing

The purpose of this training is to introduce users to the Conexus Billing component, and in particular, viewing Billing Data and Disputes. As an introductory training, it is appropriate for any user who will be working with telecom orders managed in Conexus, though management and modification of billing information will be limited to COs, CORs, and Agency Billing Management user roles in Conexus.

Training will start with an introduction to the billing component and proceed to a behind-the-scenes look at billing data and billing disputes in the Conexus environment. Finally, the Billing Data and Disputes features of the Conexus Billing component will be discussed.

A demonstration in Conexus of the various concepts covered throughout the training is presented at the end of the training video. If the user has their Conexus account set up, they can follow along and re-create the same steps.

3.4 Vendor Response Requirements

As part of the ordering process, the vendor must provide notification to GSA according to the delivery schedule in the table below. Agencies may have notifications delivered via email or other means as required by the TO. EIS contract Section J.2.4.3.2 also required that all orders be accessible via the vendor’s web interface. In addition, Pass Through Order notifications are available through Conexus.

The table below outlines the EIS contractually required notifications and corresponding delivery schedule. Task order specific notification requirements would supersede the requirements in this table.

Table 1: Notifications List – Purpose & Delivery

<table>
<thead>
<tr>
<th>Schedule Notification</th>
<th>Purpose</th>
<th>Delivery Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Order Acknowledgement (SOA)</td>
<td>Notifies the government its Service Order (SO) has been received.</td>
<td>Within 1 business day after SO receipt date</td>
</tr>
<tr>
<td>Service Order Confirmation (SOC)</td>
<td>Notifies the government that the SO information is sufficient to process and has been issued.</td>
<td>Within 5 calendar days after SO receipt</td>
</tr>
<tr>
<td>Service Order Rejection Notice (SORN)</td>
<td>Notifies the government that the SO information is insufficient or otherwise invalid and that the order cannot be processed.</td>
<td>Within 5 calendar days after SO receipt</td>
</tr>
<tr>
<td>Schedule Notification</td>
<td>Purpose</td>
<td>Delivery Schedule</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Firm Order Commitment Notice (FOCN)</td>
<td>Notifies the government of the Firm Order Commitment (FOC) date when the vendor is committed to delivery of the ordered service.</td>
<td>If a local access subcontractor is required to complete provisioning: within 1 business day of receiving FOC date from local access subcontractor. If a local access subcontractor is not required to complete provisioning: prior to the earlier of 5 days after SOC or 10 days before the FOC date</td>
</tr>
<tr>
<td>Service Order Completion Notice (SOCN)</td>
<td>Notifies the government that service has been installed and/or activated (“turned up”).</td>
<td>Within 3 days after service is installed, tested, accepted by the Agency</td>
</tr>
<tr>
<td></td>
<td>The SO has been completed and billing starts as of the included completion date.</td>
<td></td>
</tr>
<tr>
<td>Other Notifications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Order Administrative Change (SOAC)</td>
<td>Notifies the government that an administrative change has been completed and provides details of the change.</td>
<td>Within 7 days after Administrative Change SO</td>
</tr>
<tr>
<td>Service State Change Notice (SSCN)</td>
<td>Notifies the government that an installed service (defined at the UBI) has changed state (e.g., an auto-sold CLIN has been activated).</td>
<td>Within 24 hours of state change</td>
</tr>
</tbody>
</table>

### 3.5 Additional Conexus Resources

In addition to the resources and training discussed above, the Conexus websites include additional information and resources. The homepage for Conexus includes brief descriptions of all the components of Conexus and their purpose.
Conexus also has links to period newsletters they have created with helpful hints and details on what is happening with Conexus and EIS. Conexus newsletters also have contact information for the help desk and links to available training(s).

Finally, the site has links to GSA EIS websites and documents related to EIS and the transition from Networx and legacy contracts.

Users and Agency representatives are encouraged to reach out to conexus.help@gsa.gov for help with any questions or issues that they are unable to resolve.

4 Contract Modifications
Conexus has no role in the contract or task order modification process. Modifications are triggered when services required on an Agency task order are not on a vendor’s EIS contract. If the scope of what an Agency is ordering is not on the task order, vendors will not be able to accept the SO and a modification will need to be completed. Modifications are typically initiated to add or change existing services, add new services, and to make changes to task order specific requirements.

5 Additional EIS Resources
5.1 EIS Website
The EIS Website can be found at https://www.gsa.gov/eis. This website has numerous resources to assist Agencies in their transition to EIS. Figure 6 below shows the EIS homepage including the different resources available to Agency users.
Below is a brief description of each section of the EIS website:

- **Contract Basics** – high level description of the EIS contract and a link to the EIS Industry Partners page.
- **How to Order** – provides links to various ordering documents and instructions on how to request a Delegation of Procurement Authority (DPA) as well as how to request an in-scope review of Agency completed solicitation packages.
- **Delegation of Procurement Authority** – includes information on how to request a DPA.
- **EIS Training Opportunities** – provides links to self-paced e-learning courses, instructor led courses and informational videos.
- **Industry Partners** – provides links to each EIS vendor’s website along with contact information for each vendor as well as their EIS contract number. It also includes links to each vendor’s EIS catalog.
• EIS Resources – provides links to numerous resources developed to assist Agencies with the transition to EIS. This includes Ordering and Management Resources, Informational Videos, Agency Tool Resources, Transition Resources, and IT Modernization Resources.
• EIS Transition – provides information on the EIS transition schedule as well as links to various transition guides developed to support Agency users.

5.2 EIS Management and Operations (MOPS) Handbook
Within the EIS website is the MOPS Handbook which focuses on implementation and operations functional tasks. It lays the foundation to assist Agency staff in understanding the necessary ordering and administration processes to effectively use the EIS contracts.

Section 5.3 Service Ordering in the MOPS handbook provides detailed information on ordering EIS services. It is not specific to Direct or Pass Through orders but provides information on all service order types that may be placed on task orders.

The following table of ordering terms and descriptions has been provided from the MOPS Handbook to assist in the ordering process.

Table 2: Orders and Descriptions

<table>
<thead>
<tr>
<th>Order</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category: New Service Installation</strong></td>
<td></td>
</tr>
<tr>
<td>New Service Install</td>
<td>Orders for new services that are not currently being provided by the vendor. New services may require a modification to a task order or require a new Fair Opportunity (FO) competition and new task order.</td>
</tr>
<tr>
<td><strong>Category: Changes to Services Previously Provisioned</strong></td>
<td></td>
</tr>
<tr>
<td>Move</td>
<td>Orders that require the removal of an existing service and/or SRE from one location and the re-installation of the identical service and/or SRE at another location. This results in two line items on the SOCN (one to remove the service from the old location and one to add it to at the new location).</td>
</tr>
<tr>
<td>Feature Change</td>
<td>Orders that require changes to the features of an existing service but do not require a change in the</td>
</tr>
<tr>
<td>Order</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CLINs for the service. (Features are defined in EIS contracts Section B.)</td>
<td></td>
</tr>
<tr>
<td>Configuration Change</td>
<td>Orders that require changes in the configuration of an existing service without adding or removing CLINs or features.</td>
</tr>
<tr>
<td>Disconnect</td>
<td>Orders that require the removal of service(s) currently being provided.</td>
</tr>
<tr>
<td>Administrative Change</td>
<td>Orders that only require changes to administrative data associated with an existing service. Administrative data is limited to data provided by the government that does not impact service delivery or pricing – for example, AHCs or ASRNs. (Administrative changes are further defined in EIS contracts Section G.3.3.2.2.4.)</td>
</tr>
<tr>
<td>Category: Updates/Supplements to In-Progress Orders (prior to SOCN)</td>
<td></td>
</tr>
<tr>
<td>Cancel Order</td>
<td>Order updates that cancel the original order in whole or in part. <strong>NOTE</strong>: The Agency may be liable for a cancellation charge depending on the precise timing of the cancel order as described in EIS contracts Section G.3.3.2.3.1.</td>
</tr>
<tr>
<td>Update Service Location</td>
<td>Order updates that change the specified service delivery location from that specified in the original order but do not impact Local Exchange Carrier (LEC) provisioning. <strong>NOTE</strong>: Location updates that do impact LEC provisioning are handled as an order cancel and a new order.</td>
</tr>
<tr>
<td>Update Features</td>
<td>Order updates that change the specified features of a service from that specified in the original order but that do not require a change in the CLINs for the</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Order</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>service. (Features are defined in EIS contracts Section B.)</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong>: Changes that require new CLINs are handled as a cancel order and a new order.</td>
</tr>
<tr>
<td>Update Customer Want Date</td>
<td>Order updates that change the Customer Want Date (CWD) from that specified in the original order.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong>: There are specific limitations on changes to the CWD described in EIS contracts Section G.3.3.2.3.4.</td>
</tr>
<tr>
<td>Administrative Data Update</td>
<td>Order updates that only change the specified administrative data associated with a service from that specified in the original order.</td>
</tr>
<tr>
<td></td>
<td>Administrative data is limited to data provided by the government that does not impact service delivery or pricing – for example, AHCs or ASRNs.</td>
</tr>
<tr>
<td></td>
<td>(Administrative changes are further defined in EIS contracts Section G.3.3.2.2.4.)</td>
</tr>
</tbody>
</table>

The full MOPS Handbook can be found on the EIS homepage and the EIS Resources page at https://www.gsa.gov/eis.

### 5.3 EIS Fair Opportunity and Ordering Guide

The EIS Fair Opportunity and Ordering Guide was developed for Ordering Contracting Officers (OCOs) and other stakeholders to facilitate the use of the Enterprise Infrastructure Solutions (EIS) contracts and ensure a successful, timely, and orderly transition of telecommunications services from expiring legacy contracts – Networx, WITS 3, and GSA Regional Local Services.

Section 5: Administration of the EIS Fair Opportunity and Ordering Guide addresses how to place service orders; modify task orders; manage disputes and terminations; and close out task orders.
6 Conexus Ordering Checklist

☐ The user has an awarded and funded task order
☐ The users vendor is able to accept SOs through Conexus.
    a) EIS Interact maintains Conexus On-Boarding list:  
       https://interact.gsa.gov/node/467476
    b) If your vendor is not able to accept SOs through Conexus you must work directly with  
       the vendor to place SOs.
☐ The users Agency has an assigned Agency Administrator (AA)
    a) Please contact Conexus.help@gsa.gov if you do not know who your AA is  
    b) Agencies cannot enter any data in Conexus until an AA is assigned  
    c) Agencies can have multiple AAs  
    d) AAs are at the Agency level and can see all TOs  
    e) Assigned CO/CORs come from the TO and can do anything within the TO they are  
       assigned to. This can override AA permissions by virtue of their role within the TO.  
    f) CO/CORs cannot assign permissions to other users  
    g) AAs assign permissions to Agency users to enter data into Conexus
☐ The users AA has assigned you a login and permissions to enter SOs.
☐ The user has a complete list of materials, including CLINs and quantities, from the  
   vendor. This should include everything required to enter the SO correctly.  
    a) Conexus does NOT know the CLINs required to complete and order correctly.  
    b) Vendors will reject orders that do not include all of the correct CLINs and quantities.  
    c) All items ordered must be on the same TO – you cannot enter items from different  
       TOs
☐ Once the user has a completed list of materials from the vendor, use a spreadsheet (or  
   something similar) that identifies Conexus fields required and the information to be entered  
   into Conexus. Pre-populate all fields prior to starting a SO to make entry easier. Contact  
   the Conexus team through conexus.help@gsa.gov for assistance with an acceptable  
   template.  
    a) Utilize the training videos and PowerPoint guides at https://conexus-cert.gsa.gov/  
       when entering SOs.  
    b) Vendors will reject orders that do not have two contacts for each location for each  
       item ordered
7 EIS Ordering Process Flow

Funded Task Order Awarded

Contractor not approved: Contact your contractor to enter Service Orders through their Portal or Email Section 3.2

No

Your awarded contractor is approved for Conexus Ordering Section 3.1

See section 3.3.4 and contact conexus.help@gsa.gov

Yes

Your agency has an assigned Agency Admin and you have a Conexus login with ordering permissions

No

Work with your contractor to create a complete list of materials including CLINs and Quantities to enter the SO properly. See section 3.4 Materials List and Data Collection Spreadsheet

Yes

Using the list of materials populate the remainder of the required fields for Conexus and contractor acceptance. See section 3.4 Materials List and Data Collection Spreadsheet

Submit for Approval (for agency users that are not the CO/COR).