



matX Goods and Materials Exchange

QuickStart user guide

June 2023



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Document version

We continuously improve matX and regularly update the user guide. Check the website regularly to make sure you're using the most up-to-date version.




1. Getting started

1.1 Register to use matX

If you've received an invitation email, click **Join** in the email.

You can also register directly from our website, matx.com.au

- ✘ On a pc or tablet, click **Register** in the top right-hand corner.
- ✘ On a smartphone, click , then click **Register** at the bottom of the screen.


Enter your details and click **Register**. You'll need to verify your account via email before you can log in. Back at the login screen enter your email and password and click **Login**. This will take you to **My Home** on the website.

My Home is your matX home page. You can navigate the matX from this screen.

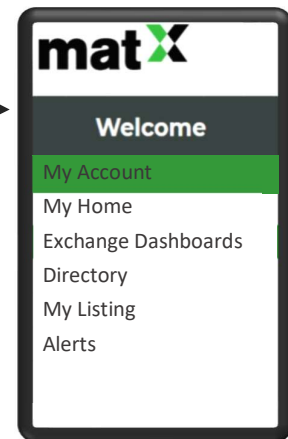
TIPS

- ✘ If the matX app is not displaying as expected on your pc or smartphone, check that you are using an up-to-date web browser.
- ✘ If you do not receive a verification email when you register, check your junk folder.

1.2 Set up your account

Go to **My Home** and click on the grey menu  →
From here, go to **My Account** to add or edit your details.

Under **matX membership details**, choose either **All exchanges** or **Private** exchanges. If your membership is covered by an existing subscription, add the subscription number.



matX membership details
Select exchange type. See [HOW IT WORKS](#) for description of exchange types.

All exchanges - Business exchanges (medium to big business, industry wide groups), private exchanges and the public exchange.

I am covered by an existing subscription

Request information on a matX subscription. A member of our matX team will contact you.

Private exchanges (individuals, groups and small businesses) and the public exchange. Pay-to-post user.



Select at least one payment option for your buyers and enter any relevant details. The default payment option for your buyers is that they may be invoiced. Click **Save Changes**.

1.3 Accept invitation to join an exchange

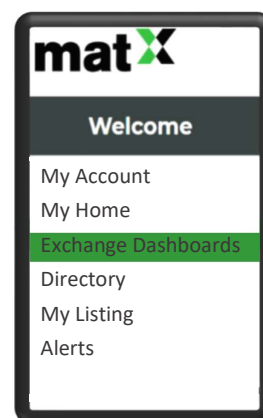
You can accept invitations to join an exchange through the invitation email or directly through the website.

Click **Join** in the invitation email. If you're already a registered user, the invitation will automatically be accepted. Otherwise, you'll be prompted to register (see section 1.1 Register to use matX).

If you're a registered user, you can also login and go to **Exchange Dashboards** in the grey menu. Click **Accept** next to the exchange name.

Being a member of an exchange lets you see all current listings on that exchange and access the exchange dashboard.

If it is a business exchange, that exchange's administrator sets user permissions for each member. Permissions give you access to different functions such as buying or selling on an exchange (see section 2.3 Manage user permissions for more information).



TIP

✘ If you accidentally click **Decline** or **Leave Exchange**, you'll need a new invite to join again. Functionality to search and request to join an exchange is *coming soon!*

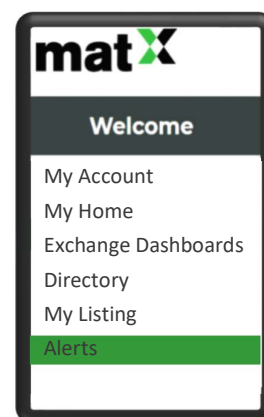
1.4 Set alerts

Configure alerts to get notifications by email and SMS.

Go to **Alerts** in the grey menu and select your preferences. You can include alerts for any specific goods and materials categories you're interested in. Then add or edit your email address and phone number and click **Save**.

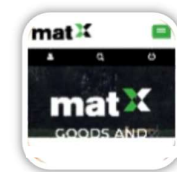
TIP

✘ Avoid 'alert fatigue' by only setting the alerts you need. You can revisit at any time to tweak your preferences.





1.5 Add the matX tile to your smart phone

matX is not in the app store but it can still be saved on your smartphone screen for easy access.



Apple iPhone

- ✘ in your phone's internet browser go to matx.com.au and tap on the share menu button  at the bottom of the screen
- ✘ scroll down and tap **Add to Home Screen** 
- ✘ enter a shortcut name and tap **Add**

Android phone

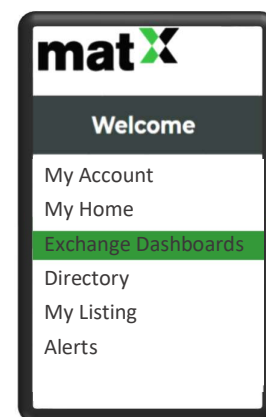
- ✘ in your phone's internet browser go to matx.com.au and tap on the Menu button
- ✘ tap on **Add to Home Screen**

2. What you can do with matX

2.1 Create a new exchange

Go to **Exchange Dashboards** in the grey menu. This is where you can see all the exchanges that you're a member of and access their dashboards. You can also create a new exchange.

Under **Create New Exchange**, enter an Exchange name. If you are covered by a subscription, select either a business or private type of exchange. If you are not covered by a subscription, you can only create a private type exchange. See [How it Works](#) for more information on types of exchanges. Click **Create**.



TIPS

- ✘ Exchanges can be short-term or ongoing as needed.
- ✘ They are easy to create.
- ✘ If you create a new business exchange, you are automatically assigned administration permission however you can easily share or transfer your administration permission to one or more other members (see section 2.3 Manage user permissions for more information).



2.2 Invite people to join an exchange

Go to **Exchange Dashboards** in the grey menu, then click the **Dashboard** button for the exchange you want. In the **Add exchange member** section, enter the email address of the person you want to invite and click **Invite**.

Add exchange member

Enter the email address for the person you are inviting to join this exchange. An invitation will be emailed to them.

Email Address

INVITE

Members of an exchange can invite others to join

Invitees receive an automated invitation email that includes the name of the exchange and the name of the person inviting them (see section 1.3 Accept invitation to join an exchange).

2.3 Manage user permissions

Different user permissions give business exchange members access to different functions in matX. For business exchanges, there are three different user permission levels: visibility, financial or administration. In private exchanges, all members have the same permission level.

Administration permission allows you to set the permission levels of other members, as well as remove members from an exchange.

To set permissions, go to **Exchange Dashboards** in the grey menu and click the **Dashboard** for the exchange you want to manage. Scroll down to **Exchange Manager**.


Set user permissions by ticking and unticking boxes under each function.

Member Name	Permission Level	Administrator	Financial	Visibility	Action
[Redacted]	Visibility	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
[Redacted]	Financial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
[Redacted]	Administrator				







Example exchange administrator(s) view for a business type exchange



TIP

-  If you create a new business exchange, you are automatically assigned administration permission. You can share or transfer your administrator role.
- Example 1 – create a multi-business exchange and give one or more people from each of the businesses involved administration permission so they can manage their own members. This can be done at any time, so the exchange can evolve with your business and sector needs.
 - Example 2 – transfer your administrator role to another member when you change roles.

2.4 Business exchange user permission levels

User permission level:	Permission allows members to:	Suitable for:
Visibility	<p>This is the default level for all new members.</p> <p>You can:</p> <ul style="list-style-type: none"> receive alerts for listings being advertised in the exchange view exchange listings visit the exchange dashboard to:<ul style="list-style-type: none">○ view exchange statistics○ download a report of exchange transactions in excel format○ see the full list of members and their permission level in that exchange○ invite other people to join the exchange	<p>Wider project team members you want to keep notified, e.g. site workers, design team, environmental team</p>
Financial	<p>In addition to the visibility permission, you can:</p> <ul style="list-style-type: none"> create a new listing draft, edit and post listings buy listings	<p>People with authority to buy and sell on behalf of the project team e.g. procurement, construction managers, plant managers</p>



User permission level:	Permission allows members to:	Suitable for:
Administrator	<p>In addition to the financial permissions, you can:</p> <ul style="list-style-type: none"> ✘ add an exchange a logo ✘ rename the exchange ✘ change permission levels of exchange members ✘ remove exchange members ✘ share or transfer administration rights with other members ✘ shut down the exchange, provided all exchange members have been removed and there are no other administrators 	People who are responsible for administering the exchange

TIP

- ✘ User permission levels on the website are undergoing further development to simplify and evolve with user needs.

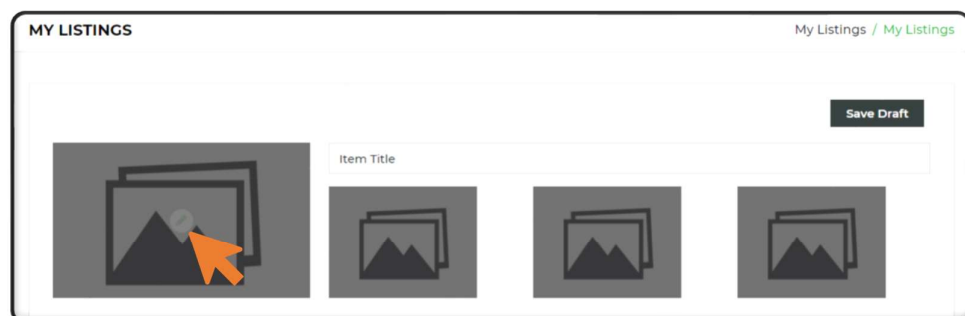
2.5 List resources for sale

2.5.1 Create a new listing

To create a listing you will either need to be covered by a subscription model or make sure a credit card is enabled under your details in **My Account**.

From any screen in the website, click **New Listing** in the top menu. Alternatively, go to **My Listings** in the grey menu and click **Add new**.

Enter a **title** for the listing. Uploading **photos** is optional but recommended. Upload photos from files or directly from your smartphone's camera by clicking on one or all picture squares.



TIP

- ✘ Once a title is added the listings can be saved as draft and completed later. For example, you can upload photos onsite using your smartphone, save to draft and then add other supporting documents and details when you are back in the office.

Use the dropdown lists to select **Category**, **Product/Material**, **Source**, **Format**, **Condition/Classification**, **Inspection** and **Transport** options. These fields are mandatory. The information captured is of interest to potential buyers as well as your sustainability team.

You have the option to upload supporting **documents** that potential buyers on the exchange can view – for example, testing documentation or specifications. Select all documents and upload together.

TIP

- ✘ Select up to three documents from the same location and upload. To upload additional documents, **Save draft** listing and repeat.

Provide the **pickup or delivery window** from and to dates for when the resource will be physically available.

TIP

- ✘ matX enables resources to be advertised before they are physically available – this creates more time to identify and action opportunities.

Provide the **Location** of the resource being listed. If the box is left unticked the listing will display the suburb.

Category (Multi Select) ▾

Product / Material (Multi Select) ▾

Source ▾

Format ▾

Condition / Classification ▾

Inspection ▾

Transport ▾

Condition / Classification Documents

Select document

Acceptable file format png, jpg, jpeg, pdf, docx

Pick up or delivery window

From*

To*

Google Map

Display exact location on website (if unticked, only the general location is shown on the listing)

Map Satellite

Liberty National Golf Course

Statue of Liberty National Monument

New Jersey Turnpike


Pioneers Terroir



Listings can be **general listings** for example, supplier listings, or for specific quantities.

Specific listings can be sold **in parts (i.e. lots)**. Selling in lots may result in multiple buyers, potentially from different exchanges. The default number of lots is one (1). The quantity can be **exact, approximate or best guess**.

TIP

 If there is going to be surplus at the end of the work, but you don't know how much, list as **best guess**.

Add Item Description.

General listing

Selling in Lots of Units Quantity is

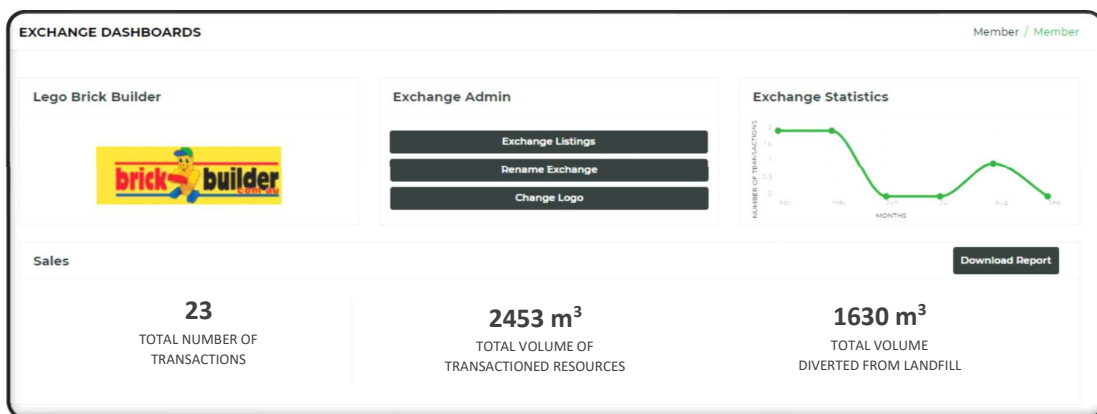
Item Description

If this listing is not sold, material will go to landfill

Enter the approximate volume in cubic metres m³

An approximation of the **total volume (m³)** is needed to help estimate the total volume of resources transacted through the exchange.

If you check **If this listing is not sold, material will go to landfill**, the volume transacted will be added to **Total volume diverted from landfill** on the **exchange dashboard**.



Example data from listing transactions is captured and displayed on the exchange dashboard

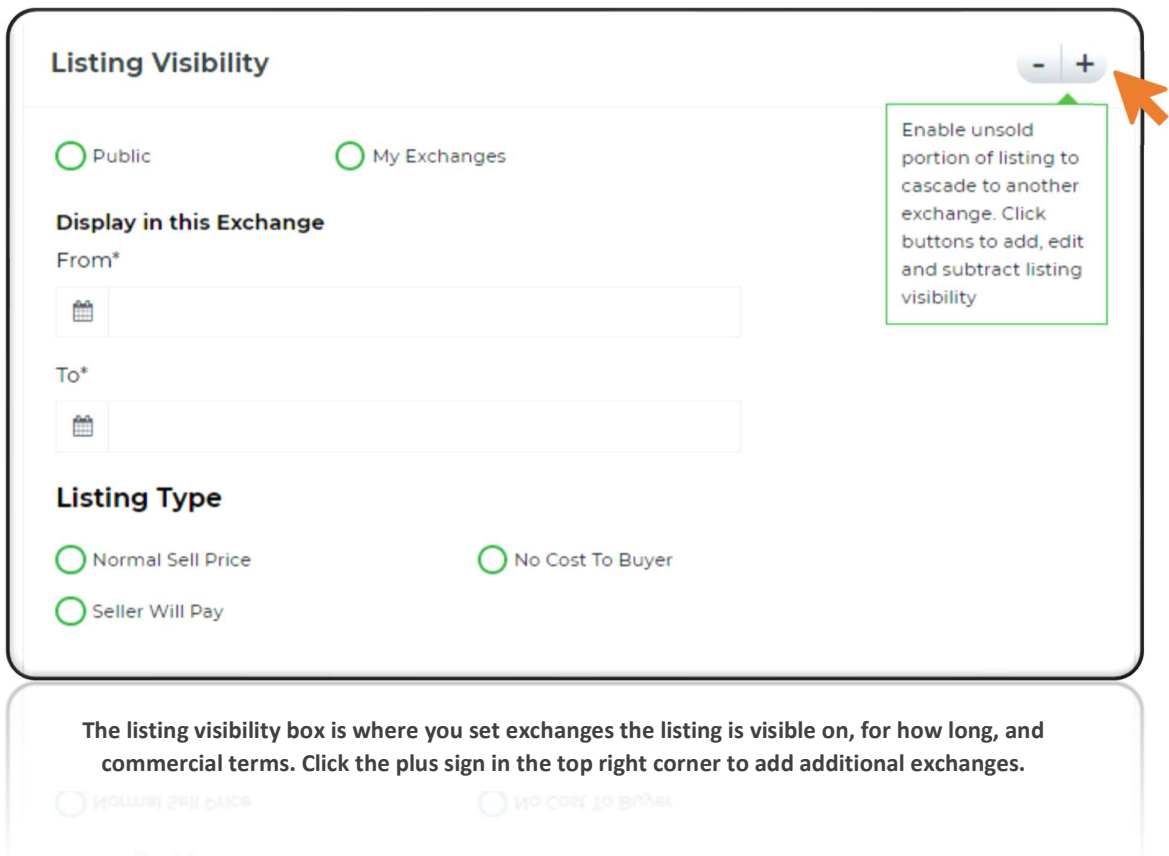


2.5.2 Set listing visibility

Listings can be posted on one exchange or any unsold portion can be set to cascade through any combination of exchanges you belong to and have the permission to sell on.

To select **Listing Visibility** fill in the box on the **New Listing** page. Select dates when the listing will be **displayed in this exchange** and add commercial terms under **Listing Type** e.g. normal sell price, no cost to buyer or seller will pay.

To add additional exchanges, click the plus button to the right of **Listing Visibility**.



The screenshot shows the 'Listing Visibility' form. At the top right, there are minus and plus buttons. A green callout box with an arrow pointing to the plus button contains the text: 'Enable unsold portion of listing to cascade to another exchange. Click buttons to add, edit and subtract listing visibility'. The form includes radio buttons for 'Public' and 'My Exchanges', a 'Display in this Exchange' section with 'From*' and 'To*' date pickers, and a 'Listing Type' section with radio buttons for 'Normal Sell Price', 'No Cost To Buyer', and 'Seller Will Pay'.

Once all details are completed, click **Post Listing**.

TIP

 For rules around buying and selling see [How it Works](#) on the website.



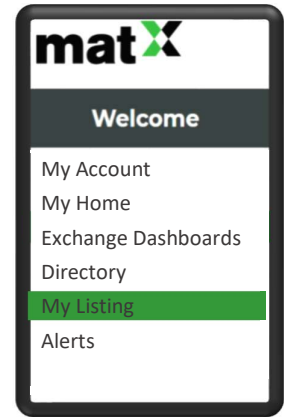
2.5.3 Duplicate, edit or delete a listing

Go to **My Listings** in the grey menu.

Click **Edit** alongside a listing to make changes to it. When you're finished editing, click **Save Draft** or **Post Listing** as needed.

If you click **Duplicate**, a duplicate listing will appear on screen. You can then rename and edit the listing as above.

To delete a listing, click **Remove Entry**. A pop-up will appear to confirm before the listing is deleted.



TIPS

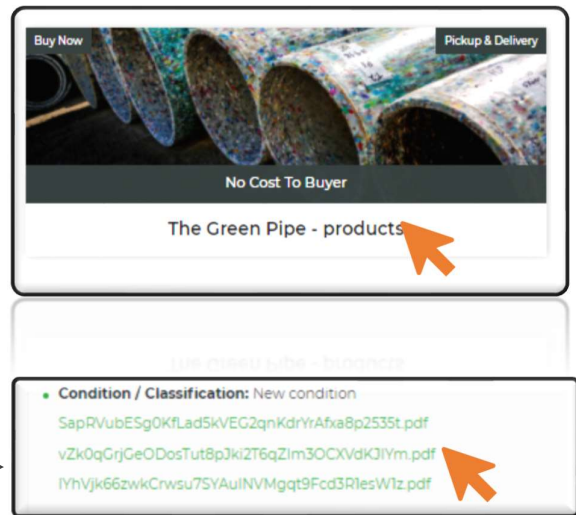
- ✘ If you are editing dates, first delete all **listing visibility** boxes by clicking the minus button, update the **pick up or delivery window**, then add **listing visibility** boxes by clicking the plus button.
- ✘ The "from" date for both **pick up or delivery window** and **display in this exchange** cannot be in the past.

2.6 Search exchanges

Click on **My Exchanges** in the top menu to view all listings available to you in exchanges you're a member of. Use the fields in the left-hand menu on this page to search for specific listings on either **My Exchanges** or the **Public** exchange.

Click links to download any linked documents.

Contact the seller for more details as required.

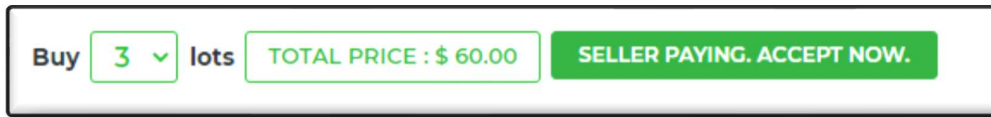
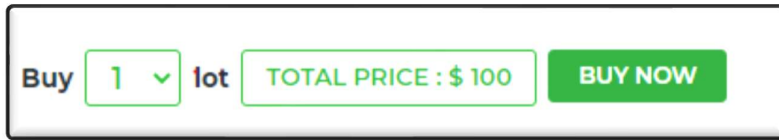


2.7 Purchase a listing

Click on the particular listing (see section 2.8 Search exchanges for more information).

Select **number of lots** and click **Buy Now** or **Seller Paying. Accept Now**. A pop-up will appear to confirm before the listing is purchased.





Notification emails with the listing specifics and buyer and seller contact details will be sent to both buyer and seller.

Transaction details are available for viewing through the **Exchange Dashboards**.

TIPS

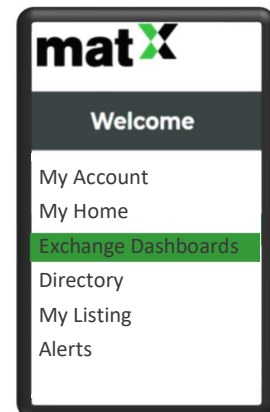
- ✘ For rules around buying and selling see [How it Works](#) on the website.
- ✘ If you make a mistake, contact the seller. Listings can be easily reposted.

2.8 Capture commercial and environmental data

For each exchange it is possible to download all transaction data to Microsoft Excel. Go to **Exchange Dashboard** and click **Download Report**.

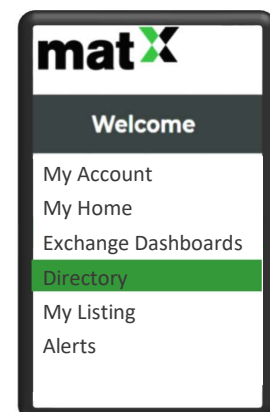
Commercial and environmental data from transactions for a listing are all attributed to the listing's first exchange. This avoids double counting.

Additional functionality is in development that will allow sellers to attribute sale transactions data to a specific project.



2.9 Advertise a business or service

To advertise your business or service, make sure a credit card is enabled under your details in **My Account**. Go to **Directory** in the grey menu and click **Add new**.



3. Feedback and suggestions

3.1 Reporting bugs

matX has undergone in-house testing and an industry trial but we expect users will continue to find new and innovative ways to challenge the software!

To report defects, email support@matx.com.au with:

- ✘ Your name and contact details
- ✘ Date of defect
- ✘ Description of defect and/or screenshots. Include enough detail so we can replicate and resolve the issue.



3.2 Intellectual property (IP)

matX is a new platform that will continue to develop. Feedback and suggestions may be adopted. All rights and IP are owned by matX.