

# Gold Parts Marketplace

## Seller's User Guide

**Version 1.0**

**Date – October 2022**

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# Marketplace Transaction Process

A marketplace transaction begins with a buyer sending a request for parts from the marketplace. A request is sent either from within a Gold advice note or workshop job; or from the Gold Portal Order Parts page which facilitates bulk purchase orders and the processing of Gold suggested stock orders through the marketplace.

This transaction then shows on the buyer's Gold Portal Purchase page, where its progress can be tracked, or it can be cancelled.

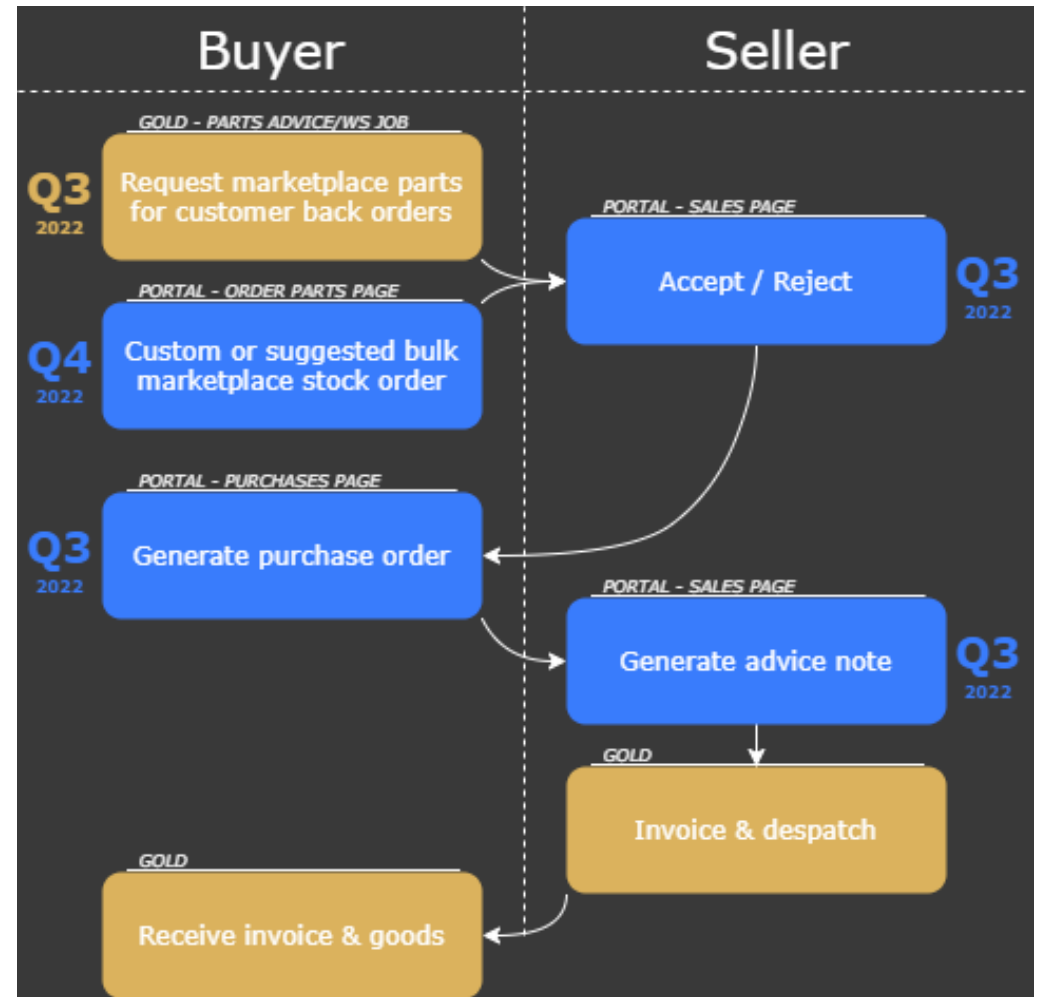
The seller then receives this request to their Sales page. From here they either need to accept or reject the request for parts.

If they accept, the buyer can then automatically generate a purchase order with a button on their Gold Portal Purchases Page.

Finally, with a PO number generated, the seller can automatically generate an advice note from their Gold Portal Sales page.

Goods and invoice can then be dispatched and received with existing Gold processes.

Emails to both the buyer and seller, using the email address provided under the depot information section of their marketplace profile pages, will be sent to both parties at each stage of the process.



# Section 1

## Receiving and Responding to Marketplace Requests

## Viewing Marketplace Sales

- 1 The Sales page on your Gold portal shows all parts orders you have from buyers through the marketplace. Use the filters to determine which of your marketplace Sales show on the screen. To view a recently received order, change the status view to 'All Statuses', 'Action Required' or 'Ready to Accept/Reject'.

- 2 View information about your sale, including:
  - Seller name and address (visible after you have accepted)
  - Selling depot (your depot which received the order)
  - Date requested (date the order was placed)
  - Unit and total prices for the order
  - Quantity sold
  - Status (see details overleaf)
  - Date of last action
  - Marketplace reference number
  - Advice note number & customer account (displays after you have generated an advice note)

## Sales Statuses

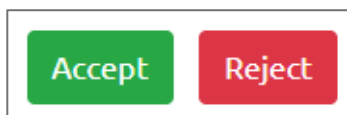
The different statuses for your marketplace sales are as follows:

Status	Description	Action Required
<b>1. Ready to Accept/Reject</b>	You have received a new request for part(s) and need to accept or reject depending on your ability to provide the part(s). Neither party's identity is visible at this stage.	Seller needs to accept/reject the request from their Sales page.
<b>2. Awaiting Purchase Order</b>	You have accepted the request and are waiting for the buyer to generate a purchase order.	Buyer needs to generate a purchase order from their Purchases page.
<b>3. Ready for Advice Note</b>	The buyer has generated a purchase order and the order number is available for you to generate an advice note.	Seller needs to generate an advice note from their Sales page.
<b>4. Seller Advice Note Generated</b>	You have generated an advice note and can invoice/deliver the goods after this point.	Invoice/delivery.
<b>Buyer Cancelled</b>	The buyer cancelled the order.	None.
<b>Declined</b>	You rejected the buyer's request.	Buyer must source parts from elsewhere.

## Accepting & Rejecting Sales Requests

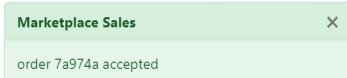


When a buyer has requested parts from your marketplace listings, you will receive an email notification to the email address entered for the selling depot on the Marketplace Profile page. It will direct you to your Gold Portal Sales page.



Clicking accept will display the buyer's information, and will trigger an email to them informing them they can generate a PO.

Clicking reject will decline the sale and trigger an email notification from the marketplace to the buyer.



## Generating an Advice Note



When a buyer has generated a purchase order after you accepted the order, you will receive an email notification telling you the transaction is ready for you to generate an advice note from your Sales page. After you generate the advice, the buyer will receive an email saying that goods & invoice will be on the way.

**Sales** Refresh

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1 x JD-0277454  
TEST

Buyer: Tant is the best 190 - POOLE	Selling depot: ShNm_1	Status: Order Number Available
Delivery Address: <a href="#">BH124NZ</a>	Date Requested: 21/09/2022	Actioned: 17/10/2022
Billing Address: <a href="#">BH124NZ</a>	Unit Price: 135.00	Marketplace ref #: 23334a
	Marketplace Total: 135.00	Advice Note #:
	Ordered: 1	Customer account #:

Generate Advice Note

**1** On your Sales page, ensure you are filtering by one of the following statuses:

- All statuses
- Action required
- Ready for advice note

Then click the Generate Advice Note button on the front of the card

- 2**
- Select a carriage memo part for delivery charges, and enter a carriage charge if required to override the value of the carriage memo part.
  - Select one of your Gold customer accounts to use on the advice note.
  - Ensure the details on the screen are correct then click the Generate Advice Note button.

**3** On your Sales page, ensure you are filtering by one of the following statuses:

- All statuses
- Action required
- Advice note generated

The sales card will display the advice note number for the sale, which you can check in Gold.

**Generate Advice Note** x

Part:	JD-0277454
Quantity:	1
Unit Price:	135.00
Sub Total Price:	135.00
Depot:	ShNm_1
Buyer:	Tant is the best 190 - POOLE
Carriage Part:	<input type="text" value="Select a Carriage Part"/>
Carriage Charge:	<input type="text" value="0"/>
Customer Account:	<input type="text" value="Select a Customer Account"/>
Operator:	<input type="text" value="Select an Operator"/>
Delivery Address:	Abacus House, Acorn Business Park, Tower Park, POOLE, BH124NZ
Billing Address:	Abacus House, Acorn Business Park, Tower Park, POOLE, BH124NZ

*Delivery & Billing Address will be taken from the Buyer's profile*

Generate Advice

## Order Completion



Once you have generated your advice note, you can invoice this in Gold as usual and send to the buyer by email or post, and ship the goods to them.

## Email Notifications

The table below shows the email notifications received by buyers and sellers at different stages of the transaction process. Emails are sent to the email address on the depot profile of the selling and buying depots in the transaction.

Action	Buyer email notification	Seller email notification
<b>Buyer requests parts for backorder on a parts advice or workshop job</b>	Your parts have been requested	New request received – you need to accept or reject
<b>Seller accepts request for parts</b>	Your request was accepted. Generate a PO	
<b>Buyer generates purchase order</b>		Order number available – you need to generate an advice note
<b>Seller generates advice note</b>	Seller has generated advice note, expect to receive goods and invoice	
<b>Buyer cancels</b>	Order cancelled	Order cancelled
<b>Seller declined</b>	Seller declined – source parts from elsewhere	