

Gold Parts Marketplace

Rules Engine User Guide

Version 1.2
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Contents

Overview	Error! Bookmark not defined.
1 Module Setup	5
Enabling Functionality	5
Obtaining & Activating a Licence	5
Enabling Portal Access.....	5
Marketplace Profile	6
Company Profile.....	6
Depot Profiles.....	7
Prefix Mapping	8
2 Creating Marketplace Listings.....	11
Listings Manager Page	11
Quick start guide.....	11
Creating Filters.....	12
Quick Start Guide	12
Depot Filters	13
Date Filters	13
Prefix Filters	14
Product Group Filters.....	14
Class Code Filters	15
Price Modifiers.....	16
Designing Listing Rules.....	17
Quick Start Guide	18
Creating a New Listing Rule	19

Adding Filters to a Rule	19
Previewing Parts in a Rule.....	20
Excluding Parts.....	21
Prioritising Your Rules	22
Uploading Your Listings	23
Quick Start Guide	23
Selecting Rules to Upload	24
Removing Marketplace listings	24
Review & Upload Process	25

Section 1

Module Setup

1 | Module Setup

Enabling Functionality

Obtaining & Activating a Licence

Contact your account manager, or complete the [sign-up form on our website](#), to have a contract issued.

Your system administrator will receive a licence via email which they need to input to Gold.

Enabling Portal Access

To use the marketplace as a Gold user, you need to enable Portal access for your user profile in Gold (if you have not done so already for another module):

Gold instructions:

- Navigate to System management > Security > Personnel Security File
- Enter your password (or press enter to see a list of users)
- Navigate to the 'email' tab
- Enter an email address into the 'email address' field – **this will be your portal access username**
- Navigate to the 'Security' tab
- Set the 'application user' field to 'yes'
- Enter and confirm a new password – **this will be your password for portal access only, it will not change your Gold password**
- Ensure the 'applications' tab in the personnel security file is active

Portal instructions:

- Open your web browser
- Navigate to your company's Gold portal URL – this is provided by your system administrator and is usually a variant of [yourcompanyname].ibcos.gold
- Enter the email address which is on your personnel security file
- Enter the password you created for the portal

Marketplace Profile

Company Profile

1 Check the company name is accurate.

Company Information

Company Name

Central Billing Address

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Post Code

2 **If you use a central billing address/HQ for all your depots** then complete the central billing address information.
If your depots all deal with payments individually, leave this blank.

3 Save your company profile.

Depot Profiles

Depot Information

Depot 1 - POOLE

Marketplace Enabled

Marketplace

Display name

Contact name

Phone number

Email address

Delivery Address

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Post Code

Billing Address

[Copy Delivery Address](#) | [Copy Central Address](#) | [Clear](#)

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Post Code

Delivery Terms

« Gold Record

< POOLE

<

< 5554454

< support@ibcos.co.uk

< Abacus House

< Acorn Business Park

< Tower Park

< POOLE

< BH12 4NZ

Cancel Save

1 Enter the depot name and the details of the primary marketplace contact person at this depot.

You can use the chevron arrows to copy from your Gold record.

3 Enter the billing address for this depot.

You can copy the delivery address or central billing address with one click.

i You need to complete a depot profile and enable each depot that you want to buy or sell parts through the marketplace.

2 Enter the delivery address for this depot.

You can use the chevron arrows to copy from your Gold record.

4 Enter delivery terms for this depot.

Include your structure of carriage so that buyer's know what to expect to pay for parts.

5 Click save and choose to enable the depot, then repeat for all depots.

Marketplace Password

You can set a marketplace password within the Marketplace Profile page. Doing so will cause a password prompt to be shown on all marketplace portal pages. This is an effective way to manage user access to the marketplace functionality.

Marketplace Order Type

You can set a marketplace order type within the Marketplace Profile page. This order type will be added to all purchase orders generated through the marketplace.

Prefix Mapping

The screenshot shows the 'Marketplace' sidebar with 'Prefix Mappings' selected. The main content area is titled 'Prefix Mappings' and contains a list of prefixes (AG, AL, AM, AO, AP, AR, AT, AZ, B1, B2, BA) with corresponding input boxes. A dropdown menu is open for the 'AM' prefix, showing a list of manufacturer names including Amazone, Ammann, and others. A 'Save' button is located at the bottom right.

Click the input boxes on the right and start typing to search for manufacturers.

1 Navigate to the Prefix Mappings page on the marketplace portal.

2 Identify the prefixes you want to buy or sell parts from through the marketplace.

3 Search for the manufacturer name which corresponds with the prefix, and select it.

4 Save your prefix mappings.

Save

Section 2

Listings Manager

2 | Creating Marketplace Listings

Listings Manager Page

Quick start guide

1 Start by creating filters for your parts stock.

2 Combine your filters to create a listing rule.

3 Preview the parts in your listing rule.

4 Review & upload your listings.

The interface shows the Marketplace sidebar with 'Listings Manager' selected. The 'Filters & Modifiers' section includes: Add Filter, Depot Filters (1), Date Filters (0), Quantity Filters (0), Prefix Filters (1), Product Group Filters (0), Class Code Filters (0), and Price Modifiers (1). The 'Listing Rules Designer' shows 'Listing Rule 1' with 164 parts and a 'Show in Preview' toggle. The 'Listing Upload' table is as follows:

Priority	Description	Last Uploaded	Current Listings	For Review	Include in Upload
1	Listing Rule 1		0	164	<input checked="" type="checkbox"/> Included

Creating Filters

Quick Start Guide

1 Start by clicking the Add Filter button.

i Filters & Modifiers + Add Filter

- Depot Filters (1)
- Date Filters (0)
- Quantity Filters (0)
- Prefix Filters (1)
- Product Group Filters (0)
- Class Code Filters (0)
- Price Modifiers (1)

3 Filters you have created will be available under the collapsible headings.

Click the heading to open it.

2 The filter creation wizard is where you make filters for your parts stock. Select which type of filter you want to create from the tabs. A title will be automatically generated, but you can rename it. Click the Create button to save your filter. Tick the 'create another' box to keep the filter creation wizard open.

Create New Depot Filter

Title *

Depot

Date

Quantity

Prefix

Product

Class Code

Pricing

<input type="checkbox"/> 1 POOLE Ibcos Computers Ltd	<input type="checkbox"/> 2 COVENTRY Ibcos Computers Ltd	<input type="checkbox"/> 3 BILLINGHAM Ibcos Industrial Services	<input type="checkbox"/> A DepotA Depot A
---	--	--	--

Create another
Cancel
Create

Depot Filters

i Select the 'Depot' tab in the filter creator to make a new depot filter.

Tick the depot(s) you want to include parts from.

Applying this filter will only include parts which are stocked in at least one of the selected depot(s).

Depot	Date	Quantity	Prefix	Product	Class Code	Pricing
<input type="checkbox"/> 1 POOLE Ibcos Computers Ltd						
<input type="checkbox"/> 2 COVENTRY Ibcos Computers Ltd						
<input type="checkbox"/> 3 BILLINGHAM Ibcos Industrial Services						

Date Filters

i Select the 'Date' tab in the filter creator to make a new date filter.

Select whether to filter age on the date last sold, last purchased, or most recent of these.

Enter a number of months.

Select whether to filter parts which were last sold/purchased greater than or less than this number of months ago.

Depot	Date	Quantity	Prefix	Product	Class Code	Pricing
<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">Last Sold</div> <div style="margin: 0 5px;">▼</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">Greater Than</div> <div style="margin: 0 5px;">▼</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px; width: 100px; text-align: center;">12</div> <div style="margin: 0 5px;">months ago</div> </div>						

Prefix Filters

i Select the 'Prefix' tab in the filter creator to make a new date filter.

Tick the prefix(es) you want to include parts from.

Applying this filter will include parts which match the selected prefix(es). Selecting multiple prefixes will filter parts for any of the chosen prefixes.

In the absence of a prefix filter, all prefixes are selected by default.

Depot	Date	Quantity	Prefix	Product	Class Code	Pricing
Select All / Select None						
<input type="checkbox"/>			<input type="checkbox"/> AG Agroparts		<input type="checkbox"/> AM Amazon	
<input type="checkbox"/>			<input type="checkbox"/> CO Consumable charge	<input type="checkbox"/> DA Daewoo	<input type="checkbox"/> DL DLL (Finance Scheme)	
<input type="checkbox"/>			<input type="checkbox"/> ER ERF	<input type="checkbox"/> F1 Flymo Machines	<input type="checkbox"/> FD FORD	

Product Group Filters

i Select the 'Product' tab in the filter creator to make a new product group filter.

Tick the product group(s) you want to include parts from.

Applying this filter will include parts which match the selected product group(s). Selecting more than one will filter parts for any of the chosen product groups.

In the absence of a product group filter, all product groups are selected by default.

Depot	Date	Quantity	Prefix	Product	Class Code	Pricing
Select All / Select None						
<input type="checkbox"/>				<input type="checkbox"/> CA0001 Case Parts	<input type="checkbox"/> CA0002 Case Competitive Parts	
<input type="checkbox"/>				<input type="checkbox"/> GA0001 Gas Supplies	<input type="checkbox"/> GA0002 Empty Returns (GAS)	<input type="checkbox"/> H10001 Honda Machines

Class Code Filters

1 Select the 'Class Code' tab in the filter creator to make a new class code filter.

2 Select which class codes you want to filter your parts by.

Applying this filter will include parts which match these class codes. Selecting multiple class codes will filter parts for any of the chosen codes.

i **Example:** The example shown would filter parts to select those with either the "Tractor" class code or the "Combine" class code.

The screenshot shows a dialog box titled "Create New Class Code Filter". At the top, there is a text input field for "Title *" containing "Tractor or Combine Class Codes". Below this is a tabbed interface with tabs for "Date", "Depot", "Prefix", "Product", "Class Code", "Part Number", and "Pricing". The "Class Code" tab is active. The main area contains a grid of class codes, each with a checkbox. The following table represents the visible class codes and their selection status:

Class Code	Description	Selected
<input type="checkbox"/>	! Initial Stock	No
<input type="checkbox"/>	+ Special Discount	No
<input type="checkbox"/>	4 Forager	No
<input type="checkbox"/>	9 Vehicles	No
<input type="checkbox"/>	E Engine Parts	No
<input type="checkbox"/>	K Kit	No
<input type="checkbox"/>	R Rubber	No
<input type="checkbox"/>	...	No
<input type="checkbox"/>	\$ Sales Dept Request	No
<input type="checkbox"/>	0 Fitall Parts	No
<input type="checkbox"/>	5 Groundcare	No
<input type="checkbox"/>	A Accessories	No
<input type="checkbox"/>	F Filters	No
<input type="checkbox"/>	L	No
<input type="checkbox"/>	S Service Tools	No
<input type="checkbox"/>	...	No
<input type="checkbox"/>	% Customer request	No
<input checked="" type="checkbox"/>	1 Tractor	Yes
<input type="checkbox"/>	6 Materials Handling	No
<input type="checkbox"/>	B Bearings	No
<input type="checkbox"/>	G Gearbox	No
<input type="checkbox"/>	M Multiple Use Parts	No
<input type="checkbox"/>	T Track	No
<input type="checkbox"/>	...	No
<input type="checkbox"/>	& Seasonal Discount	No
<input checked="" type="checkbox"/>	2 Combine	Yes
<input type="checkbox"/>	7 Construction	No
<input type="checkbox"/>	C Cooling	No
<input type="checkbox"/>	H Hydraulics	No
<input type="checkbox"/>	N	No
<input type="checkbox"/>	U Undercarriage	No
<input type="checkbox"/>	...	No
<input type="checkbox"/>	* Bulk Discount	No
<input type="checkbox"/>	3 Baler	No
<input type="checkbox"/>	8 Backhoe Loaders	No
<input type="checkbox"/>	D Drive Line	No
<input type="checkbox"/>	I Fuel Injection	No
<input type="checkbox"/>	O oils	No
<input type="checkbox"/>	V Electrical	No
<input type="checkbox"/>	...	No

At the bottom right of the dialog, there are two buttons: "Create" (highlighted in green) and "Cancel".

3 Click 'Create' to save your filter. Click 'Cancel' to return to the rules designer.

Price Modifiers

1 Select the 'Pricing' tab in the filter creator to make a new price modifier.

2 Select which value you want to base your marketplace pricing on – RRP, cost or dealer nett.

Select whether you want to increase or decrease – 'plus' or 'minus' – the price from the selected value.

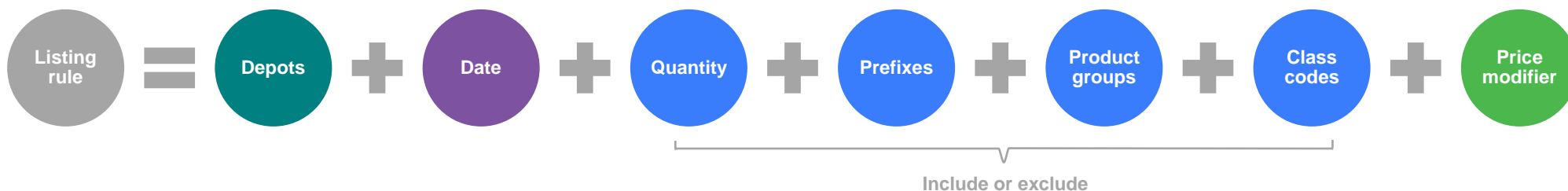
Enter a percentage to increase or decrease the selected value by. This will result in the marketplace price for your parts.

i Example: The example shown would result in marketplace pricing for the parts associated with this listing rule of the dealer nett value minus 10%.

The screenshot shows a 'Create New Price Modifier' dialog box. At the top, the title is 'Dealer Nett Minus 10%'. Below the title bar, there are several tabs: 'Date', 'Depot', 'Prefix', 'Product', 'Class Code', 'Part Number', and 'Pricing'. The 'Pricing' tab is currently selected. Underneath the tabs, there are three dropdown menus: the first is 'Dealer Nett', the second is 'Minus', and the third is '10'. Below these is a percentage sign. At the bottom right of the dialog, there are two buttons: 'Create' (highlighted with a red arrow) and 'Cancel'.

3 Click 'Create' to save your filter. Click 'Cancel' to return to the rules designer.

Designing Listing Rules



Depot filters

Filter parts based on which depot(s) they are stocked at.

Date filters

Filter parts based on the number of months since the last sale, last purchase, or whichever is most recent.

Quantity filters

Quantity filters allow you to filter your parts by those which have a minimum or maximum stocked quantity at a given depot.

Listings will not be created for parts with zero quantity, whether these are filtered out or not.

Prefix filters

Filter parts based on their prefix code. Choose to include or exclude prefixes from the listing rule.

Product Group filters

Filter parts based on their product groups. Choose to include or exclude product groups from the listing rule.

Class code filters

Filter parts based on their class codes. Choose to include or exclude class codes from the listing rule.

Price modifiers

Set a custom Marketplace price for all parts in the listing rule. Increase or decrease a percentage from the cost, RRP or dealer nett price.

Quick Start Guide

The screenshot shows the Listing Rules Designer interface. At the top, there is a header with an information icon, the title "Listing Rules Designer", an "Add Rule" button, a "Refresh" button, and a "Preview Parts" button. Below the header is a card for a rule named "Aged inventory". The card includes a dropdown arrow, a name field, edit and delete icons, "Parts: 0", "Priority: ↑↓", and a "Show in Preview" toggle. The main area of the card contains several sections: "I want to list parts from Depot(s):", "Date filters:", "Which have:", "Excluding:", and "Priced At:". The "Priced At:" section has a dropdown menu with "RRP" selected. Four numbered callouts are present: 1 points to the "Add Rule" button; 2 points to the name field; 3 points to the "Which have:" section; and 4 points to the "Preview Parts" button.

1 Start by clicking the Add Rule button.

2 Give your new rule a descriptive name.

3 Click & drag your filters into the relevant sections in your listing rule.

4 Preview the parts in your listing rule.

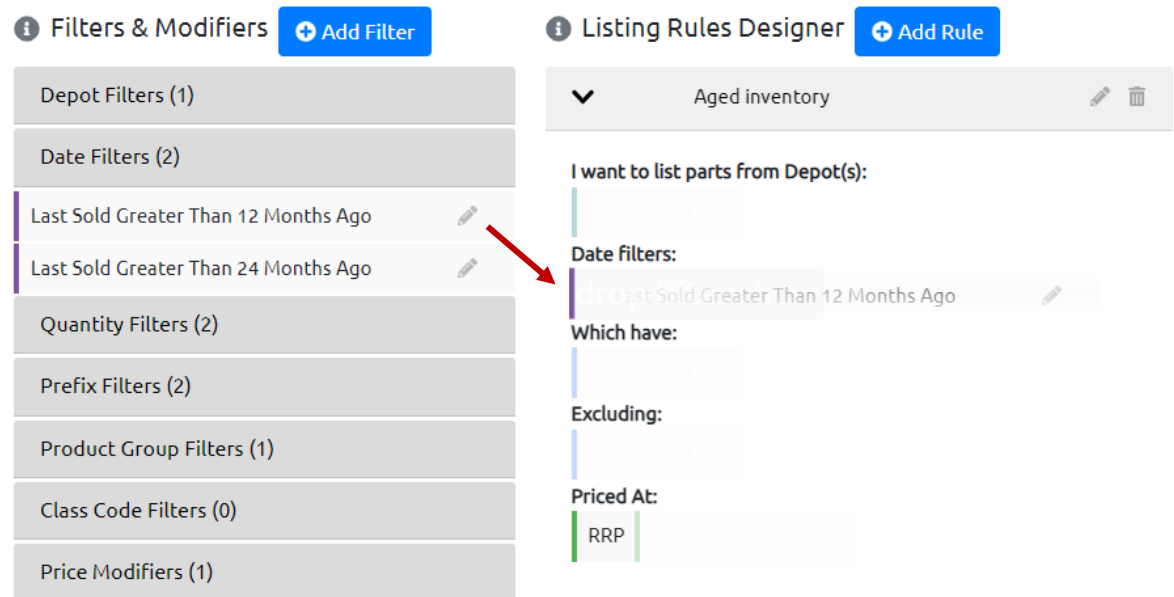
Creating a New Listing Rule

- Click the Add Rule button to create a new listing rule.
- Give the rule a descriptive name & click Ok.
- Click the arrow on the left to expand or collapse the rule designer.

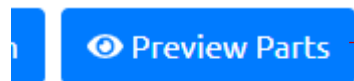


Adding Filters to a Rule

- Choose a filter from the collapsible sections on the left that you want to add to your rule.
- Click & drag this filter into the relevant section of your rule.
- There are specific sections for depot and date filters. You must include a depot filter, but do not need to include a date filter.
- Quantity, prefix, product group and class code filters can be either included or excluded. You do not need to include these filters if you don't want to.
- There is a specific section for price modifiers. The default is RRP unless you drag a different modifier in its place.



Previewing Parts in a Rule



Toggle the rule(s) you want to preview, then click Preview Parts.

Check the information in the preview including the part numbers, depots, and listing prices in this rule.

Search for parts by description or part number.

Navigate through the pages with the pagination button.

Show in Preview

Preview Parts

Previewing parts for 'Aged inventory'

Exclude ↑↓	Depot ↑↓	Part Number ↑↓	Description ↑↓	Product Group ↑↓	Class Code ↑↓	Quantity ↑↓	Listing Price ↑↓	Listing Rule ↑↓
<input type="checkbox"/>	1	JD-01134157L	FILTER OIL	CA0001	132FaZ	4268	£8.34	Aged inventory
<input type="checkbox"/>	2	JD-01134157L	FILTER OIL	CA0001	132FaZ	269	£8.34	Aged inventory
<input type="checkbox"/>	3	JD-01134157L	FILTER OIL	CA0001	132FaZ	120	£8.33	Aged inventory
<input type="checkbox"/>	1	JD-01145712-0	O-RING	CA0001	13Z	862	£3.62	Aged inventory
<input type="checkbox"/>	2	JD-01145712-0	O-RING	CA0001	13Z	0	£3.53	Aged inventory
<input type="checkbox"/>	3	JD-01145712-0	O-RING	CA0001	13Z	0	£3.53	Aged inventory
<input type="checkbox"/>	1	JD-01154974-M1	NEGATIVE TERMINAL	CA0001	13Z	1	£0.85	Aged inventory
<input type="checkbox"/>	2	JD-01154974-M1	NEGATIVE TERMINAL	CA0001	13Z	1	£1.20	Aged inventory
<input type="checkbox"/>	3	JD-01154974-M1	NEGATIVE TERMINAL	CA0001	13Z	4	£1.20	Aged inventory
<input type="checkbox"/>	1	JD-01167489-A	TENSIONER	CA0001	132 eZ	76	£2.55	Aged inventory
<input type="checkbox"/>	2	JD-01167489-A	TENSIONER	CA0001	132 eZ	65	£2.43	Aged inventory
<input type="checkbox"/>	3	JD-01167489-A	TENSIONER	CA0001	132 eZ	100	£2.51	Aged inventory
<input type="checkbox"/>	1	JD-01177454-S	GASKET	CA0001	132 eZ	23	£5.10	Aged inventory
<input type="checkbox"/>	2	JD-01177454-S	GASKET	CA0001	132 eZ	0	£5.10	Aged inventory
<input type="checkbox"/>	1	JD-01187487-W	SEAL	CA0001	132 eZ	238	£5.75	Aged inventory
<input type="checkbox"/>	1	JD-01197421-@	BRAKE BLOCK	CA0001	132 eZ	22	£6.40	Aged inventory

Excluding Parts

i In the preview list, use the tick boxes to select parts you want to exclude. Excluding parts will prevent listings being created for them, even if they are captured by your listing rules.

Each line represents a part record at a depot, so excluding one will exclude from that depot only.

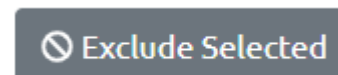
i To view the parts you have excluded, click the Excluded Parts button on the listings manager page.

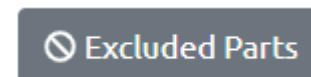
i To remove parts from the excluded list, use the tick boxes in the excluded parts list to select those you want to include in listings again.

Click the Reininclude Selected button.

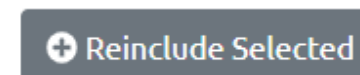
This will allow listings to be created for the part records when they are captured by a listing rule.

<input type="checkbox"/>	1	JD-01187487-W
<input checked="" type="checkbox"/>	1	JD-01197421-@

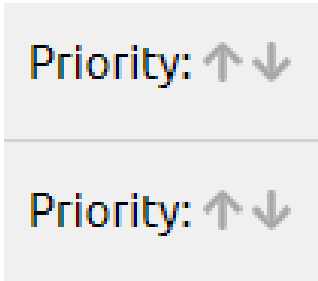
 Exclude Selected

 Excluded Parts

<input type="checkbox"/>	1	CA-61003256
<input checked="" type="checkbox"/>	2	CA-61003256

 Reininclude Selected

Prioritising Your Rules



You only need to do this if you have part numbers which are captured by more than one listing rule.

In this case, the listings manager needs to know which rule should apply its price modifier to that part. Otherwise, you may advertise your parts for a different price than intended.

Change the priority order of your listing rules using the up and down arrows.

A part record's marketplace listing price will be calculated by the price modifier in the highest priority listing rule which captures it.

Uploading Your Listings

Quick Start Guide

i Listing Upload

Priority	Description	Last Uploaded	Current Listings	For Review	Include in Upload
1	Aged inventory		0	0	<input type="checkbox"/> Not Included
2	Old non-franchise stock	14/12/2021 10:36am	9	5	<input checked="" type="checkbox"/> Included

1 Check the status of your rules and listings

3 Click to review & upload your listings.

2 Select which rules you want to upload the parts from.

Uploaded parts become listings for other users to buy.

If you **do not include** a previously-uploaded rule, all of its parts will be removed from the marketplace.

i Attempting to upload more than 10,000 part lines in a single upload may cause an error, depending on the capacity of your local hardware.

Selecting Rules to Upload

Include in Upload

Not Included

Included



Select which of your listing rules you want to upload by toggling them to 'included' in the upload. When uploaded, all of the parts captured by a listing rule will have listings created for them which other users can request to buy.

If you are completing a future upload and **do not** include a previously-uploaded rule, then all of its listings will be removed from the marketplace with the new upload.

Removing Marketplace listings

Include in Upload

Not Included

Included



To remove the listings associated with a rule, toggle it to 'not included' in the upload. Then run the review & upload process to remove all of the listings.

Review & Upload Process

Review & Upload

1

Click the Review & Upload button to complete the upload process.

Ensure the rules with parts you want to have active listings for are set to 'included', and those you don't want to create listings for (or want to remove the listings for) set to 'not included'.

Review and Upload Listings

Current Listings (34)

Added Listings (8063)

Removed Listings (19)

Changed Listings (15)

2

Current Listings

This tab shows all of the listings you currently have advertised on the marketplace, prior to this upload. If this is your first time uploading listings, this tab will be empty.

Added Listings

This tab shows all of the new listings which will be added after you complete the current upload. It will not include anything from the Current Listings tab, which are already uploaded.

Removed Listings

This tab shows all of the current listings which will be removed after you complete the current upload. Reasons for parts listings being removed include i) not selecting to upload the listing rule which captures the part or ii) the parts no longer being captured by the listing rule because they do not satisfy the filters in the rule.

Changed Listings

This tab shows all your current listings which will be changed in some way during the current upload. Reasons for changes to listings may include i) an updated part description in Gold and ii) an updated price field which the modifier is based on

Upload

3

Click the upload button to finalise the publishing of your marketplace listings. After upload, your listings will comprise anything in the Current Listings tab, plus those in the Added Listings tab, minus those in the Removed Listings tab.