

Gold Parts Marketplace

Buyer's User Guide

Version 1.0

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1. 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.

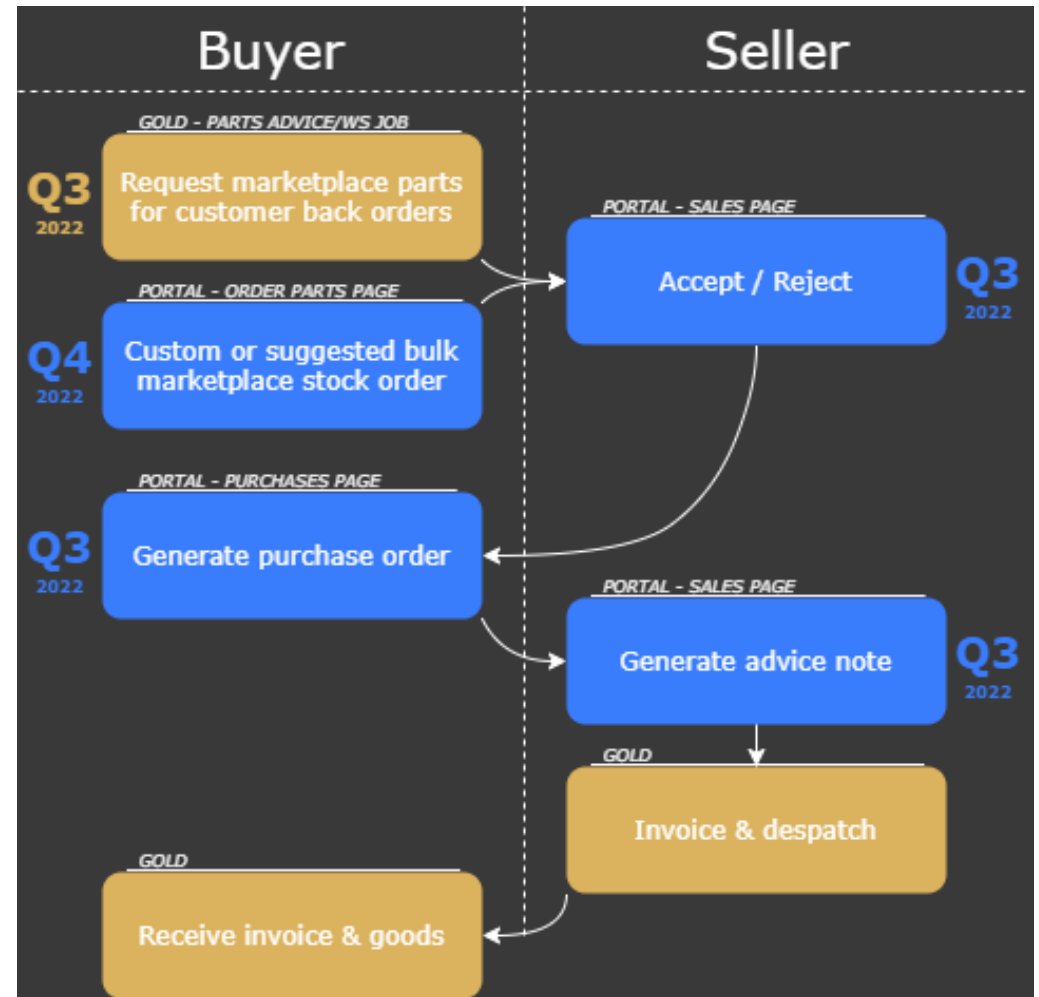
The seller then receives this request to their Sales page. From here they either need to accept or reject the request for parts.

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

Setup for Buying Marketplace Parts

2. Order Type Setup

 Marketplace Profile

1 Navigate to your Marketplace Profile page on your Gold Portal.

Marketplace Order Type

2 Select an order type to use for marketplace-generated purchase orders. Any purchase orders generated through marketplace will use this order type. If none is selected, the order type “??” will be shown on purchase orders.

Select the order type to apply to your marketplace generated purchase orders.

3 Click save to save this order type selection

Depot Information

Depot 1 - POOLE

Marketplace Enabled

4 Ensure you complete the depot information for any depot you want to buy parts into.

Section 2

Ordering Parts

3. Ordering Parts from Marketplace Listings

3.1. Searching & Browsing Listings

1 Navigate to the Order Parts page on your Gold Portal to search, browse and order parts from the marketplace.

The screenshot shows the 'Marketplace' sidebar with 'Order Parts (beta)' selected. The main search form has 'Manufacturer: Not Selected' and 'Part No.: ??-'. The 'Buying Depot' is '1 - POOLE' and the basket is 'Basket - POOLE (0)'. The search results table is empty, displaying 'No Records Found'.


2 Click on the Parts Search tab to search through marketplace listings. To search, first select a manufacturer from the searchable dropdown list, this will then display the prefix(es) you have mapped to the manufacturer. Then enter at least one character from the part no. suffix and click Search.

3 The results will show the part number, description, quantity, and price range available on the marketplace. Any parts with a prefix of 'XX' either do not exist in your Gold part records, or exist under more than one prefix for the selected manufacturer in your system.

The screenshot shows the search form with 'Manufacturer: Case' and 'Part No.: CA/KN - 12'. The search results table is titled 'Search Results for Case - 12 (7)' and contains the following data:

Basket Quantity	Part No.	Description	Qty on Marketplace	Price Range*
0 +	CA-126547	NUT	2	€0.30 - €0.30
0 +	CA-126538	BOLT	2	€0.85 - €0.85
0 +	??-12345		1000	£1.10 - £1.10
0 +	CA-1277	COMPOUND	13	€5.89 - €5.89

3.1. Adding Parts to a Basket


Basket Quantity	Part No.	Description
<input type="text" value="2"/> 	CA-126538	BOLT

1 To add a part from the search results to your basket, enter a quantity into the Basket Quantity field and click the plus icon.

Suggested Stock Order
Parts Search

Manufacturer:


Part No. : KA -

Search 

Buying Depot:

Basket - ShNm_1 (4)

Proceed to Order
Clear All

CA-126547	NUT	<input type="text" value="4"/>	X	
CA-126538	BOLT	<input type="text" value="2"/>	X	
CA-12693	FILTER OIL	<input type="text" value="1"/>	X	
??-AC495813		<input type="text" value="8"/>	X	

2 Each of your depots has a separate basket. You can switch between depot baskets with the Buying Depot dropdown option.

3 Parts you add to the basket will appear here. You can alter the quantity, delete lines, clear the basket or proceed to configure your order from here.

Any lines with a warning icon either do not have a mapped prefix for the manufacturer, or do not exist as part records in your Gold system. These issues will need to be rectified before you can order these lines.

3.2. Adding Suggested Stock Order Parts to a Basket

Suggested Stock Order Parts Search

From:

To:

[Search](#)

Buying Depot:

Suggested Stock Orders (1 - ShNm_1)

User	Depot	Order Type	Sequence	Created Date	Parts Count	Action
SS	1	Main Order	Part Number	29/09/2022 06:33:59	18	Review
SS	1	Main Order	Part Number	29/09/2022 06:40:40	18	Review
SS	1	Main Order	Part Number	29/09/2022 06:41:27	18	Review
SS	1	Over Stock Report	Product Group	29/09/2022 06:47:29	36	Review
SS	1	Main Order	Product Group	29/09/2022 06:50:15	90	Review

1 The Suggested Stock Order tab shows all the suggested orders generated through Gold for the current selected depot. You can filter the list with the date fields.

To view the lines on a suggested order, click the Review button.

2 Clicking the Review button on a suggested order will display the lines within, their suggested quantity, and their availability on the marketplace.

To add individual lines to your basket, enter a quantity and click the green plus icon.

Suggested Stock Orders (1 - ShNm_1)

[Add All](#) [Back to reports](#)

Basket Quantity	Suggested Quantity	Part No.	Description	Qty on Marketplace	Price Range*
<input type="text" value="0"/>	55	CA-01034157-L	FILTER	0	
<input type="text" value="0"/>	5	CA-010998745	SPRING	1719	£4.66 - £4.66
<input type="text" value="0"/>	5	CA-025689R05	SPRING	106	£0.55 - £0.55
<input type="text" value="0"/>	2	CA-050397	FILTER OIL	62	£22.30 - £22.30

3 To add all lines from your suggested order to the basket, click the 'Add All' button. This will show you a summary of the number of items added to the basket, and the number of items not added due to either not having a mapped prefix, not having a Gold part record, or not being for sale on the marketplace.

Suggested Stock Order Warnings

	Lines	Total Quantity
Parts:	90	1578
Prefix not mapped:	43	612
Not found on Marketplace:	27	510

Note: Parts without prefix mappings or Gold part records will not be added to the basket. Quantities will be capped at the quantity available on marketplace with your chosen order configuration. Do you wish to continue?

[Cancel](#) [Continue](#)

3.3. Configuring & Sending a Marketplace Order

1 Click the Proceed to Order button to configure your marketplace order for the active basket.

Here you will have three options:

Fulfil order by: Single seller/Lowest price.

Selecting single seller will fulfil as many items as possible from your basket from one single marketplace seller. This may leave some items behind in your basket, which you can source from another seller by configuring a separate order from a different seller.

Selecting lowest price will find the lowest price for every line in the basket, regardless of how many sellers they come from.

Partially fulfil lines? Yes/No.

Selecting Yes will order part lines even where the quantity available is less than the basket quantity. Any remaining quantity not ordered will remain in your basket to be potentially fulfilled by another seller when configuring a new order.

Selecting No will only fulfil lines where the entire quantity can be ordered. If the entire line cannot be fulfilled, then the whole quantity of a line will be left in the basket.

Currency: Any/GBP/EUR

Selecting any will source parts, either from a single seller or for the lowest price, regardless of the currency they are being sold in.

Selecting a specific currency will only fulfil your order with listings which are advertised in your selected currency.

Configure Marketplace Stock Order

Step 1 of 2

	Lines	Total Quantity
Parts:	4	15
Missing prefixes:	0	0
Missing part records:	1	8

Fulfil order by:

Partially fulfill lines?:

Currency:

Cancel
Continue

2 When you click Continue on an order configuration, the marketplace will find the most efficient way to fulfil your basket based on the options you selected.

The next screen will show you the parts being ordered from different sellers in dropdown lists, and will show you any parts which could not be ordered and will remain in the basket.

Warning icons will show for any parts where the listing price is greater than your dealer net cost.

Marketplace Stock Order

Step 2 of 2

Full lines available: 2/4 | Items available: 5/15 | Configured by: Single Seller / Partial Lines Allowed

Seller Number : 1 - 3 lines / 5 items will be requested Delivery Terms				
Part Number	Quantity	Price	Total Price	Description
CA-126547	2	€0.30	€0.60	NUT X
CA-126538	2	€0.85	€1.70	BOLT X
CA-12693	1	€17.49	€17.49	FILTER OIL X

Unavailable - 2 lines / 10 items will not be requested			
Part Number	Quantity	Description	Issue
CA-126547	4	NUT	Unable to fulfill lines with chosen configuration
??-AC495813	8		This part does not exist in Gold

Back Order Parts

Order Complete

Successfully requested 3 lines / 5 items from 1 seller locations. View your orders on your Purchases page.

Parts requested (3 lines / 5 items)					
Part Number	Description	Quantity	Price	Total Price	Seller ID
CA-126547	NUT	2	€0.30	€0.60	1
CA-126538	BOLT	2	€0.85	€1.70	1
CA-12693	FILTER OIL	1	€17.49	€17.49	1

Parts not requested (2 lines / 10 items) Configure New Order			
Part Number	Quantity	Description	Issue
CA-126547	4	NUT	Unable to fulfil order with selected configuration
??-AC495813	8		This part does not exist in Gold

Close

3 Clicking the Order Parts button will send requests to the seller(s) your order was configured by. Parts which were not ordered are shown, and you can try to order them by configuring a new order.



The email address for the buying depot on your marketplace profile will receive an email confirming that your request has been sent.

The seller's depot will receive an email notification about your order, and it will be up to them to accept or reject the request.

3.4 Ordering for Customer Backorders in Gold

1 When a part line on an advice note or workshop job has a quantity on order, Gold displays the options shown in the screenshot.

There is now a new Marketplace option which can be selected to view available listings for this part number.

2 Here, you will see all of the marketplace listings available for the part. Each line represents a different selling depot with its own description, quantity available, and price. The selling currency is shown in the info box, along with the quantity you are ordering and the total price based on the selected listing.

Press F3 to view the selected listing's delivery terms.

Press F2 to select & add the part to the order line.

Order Line Summary:

QoH	Free	WIP	OnOrd	Sal
4	4	4	0	
4	4	4	0	

Order Details:

No. **0105 - Part Line - Inserting line 1 of 1
 GASKET
 Disc% 0.00 Sold: 0 Ordered: 1

Marketplace Listings

Part Number	Seller Description	Quantity	Price(exc VAT)
JD-0277454	GASKET	9	6.24
JD-0277454	GASKET	1010	8.51
JD-0277454	GASKET	11	8.51
JD-0277454	GASKET	1009	8.51
JD-0277454	GASKET	1010	8.51
JD-0277454	GASKET	1000	8.51
JD-0277454	GASKET	11	8.51

Required: 1 Currency: EUR
 Total Price: 6.24

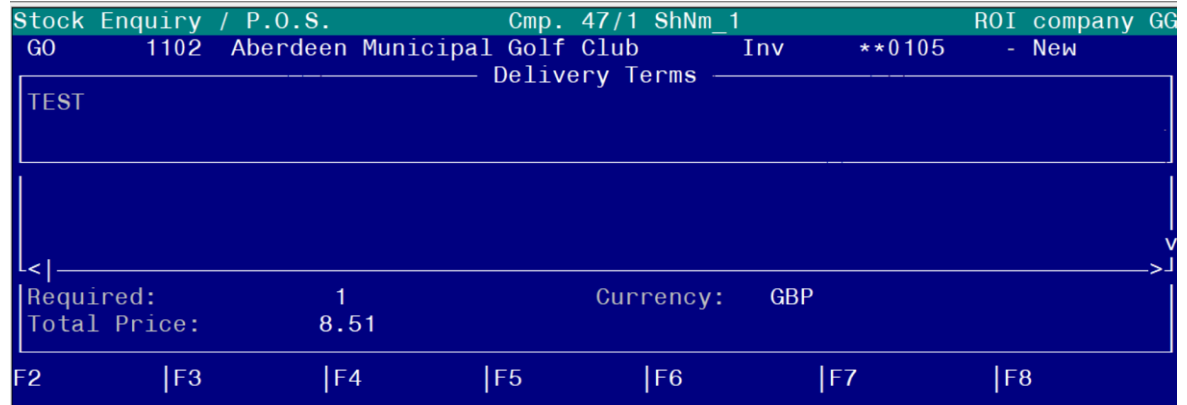
F2 Select | F3 Terms | F4 | F5 Refresh | F6 | F7 | F8

i The depot you are signed in to is where the part will be delivered to.

The delivery address will be taken from your marketplace depot profile, configured on the Gold Portal.

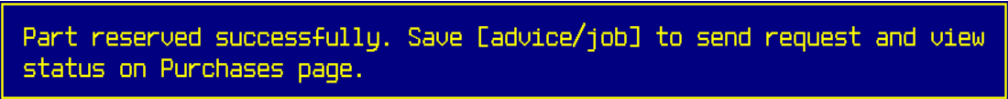
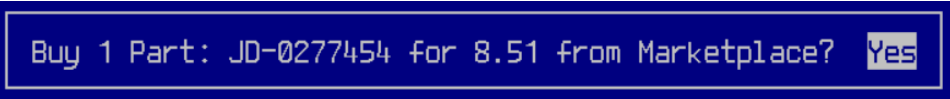
- 3 Using F3 to view delivery terms will display the seller's delivery terms on the screen. This is designed to allow you to foresee postage & packaging costs.


Press F9 to close the delivery terms.



- 4 Using F2 to select the part will allocate it as the On Order part line from your advice note or workshop job. You will be asked to confirm yes/no when you select a marketplace listing.

This will reserve the part for you, but will not send the request to the seller yet. The seller will receive your order when you save your advice note or workshop job. Saving the document in Gold causes the seller to be notified of your order. Once saved, your order can be viewed on your Purchases page on the Gold Portal.



-  The email address for the buying depot on your marketplace profile will receive an email confirming that your request has been sent.
- The seller's depot will receive an email notification about your order.

Section 3

Managing Orders

4. Tracking & Managing Orders

4.1. Purchases Page

1 The Purchases page on your Gold portal shows all parts orders you have made through marketplace. Use the filters to determine which of your marketplace orders show on the screen. To view a recently placed order, change the status view to “All Statuses” or “Awaiting Seller Acceptance”.

2 View information about your order, including:

- Seller name and address (visible after they have accepted)
- Buying depot (your depot which made the order, and will receive delivery)
- Date requested (date the order was placed)
- Unit and total prices for the order
- Quantity ordered
- Status (see details overleaf)
- Date of last action
- Marketplace reference number
- Purchase order number & supplier account (displays after you have generated a purchase order)

4.2. Transaction Statuses

The different statuses for your marketplace purchases are as follows:

Status	Description	Action Required
1. Awaiting Seller Acceptance	Your request for the part(s) has been sent to the seller's Sales page and they have received an email notification. They have the option to accept or reject your request. Neither party's identity is visible at this stage.	Seller needs to accept/reject the request.
2. Ready for Purchase Order	The seller has accepted your request and you have received an email to confirm this. You need to access your Purchases page to generate a purchase order.	Buyer needs to generate a purchase order from their Purchases page.
3. Awaiting Seller Advice Note	You have generated your purchase order and the order number is available for the seller to generate an advice note. They have received an email notification.	Seller needs to generate an advice note from their Sales page.
4. Seller Advice Note Generated	The seller has generated an advice note and will invoice/deliver the goods after this point.	None.
Cancelled	You, the buyer, cancelled the order on your Purchases page.	None.
Seller Declined	The buyer declined your request to supply parts.	Buyer must source parts from elsewhere.

4.3. Cancelling an Order

44 x JD-0134157-L
 FILTER OIL

Seller: - Not Yet Visible-
 Sellers Address: N/A

Buying depot: ShNm_1
 Date Requested: 13/10/2022
 Unit Price: 13.89
 Marketplace Total: 611.16
 Ordered: 44

Status: Awaiting Seller Acceptance
 Actioned: 13/10/2022
 Marketplace ref #: f16f41
 Purchase Order #:
 Supplier account #:

Cancel

1 Click the cancel button on an order on your Purchases page. You will be asked to confirm that you wish to cancel the order.

The seller will be informed automatically via email.

4.4. Generating a Purchase Order



When a seller accepts your order, you will receive an email notification. The email will be sent to the address listing on your buying depot's marketplace profile (configured on the Portal). If the seller rejects your request, you will receive an email advising you to source the parts from elsewhere.

Purchases Refresh

1 x JD-0277454
TEST

Seller: Tant's Tractor Co DND UAT - ShNm_1 Sellers Address: GM604FL	Buying depot: POOLE Date Requested: 21/09/2022 Unit Price: 135.00 Marketplace Total: 135.00 Ordered: 1	Status: Ready for Purchase Order Actioned: 21/09/2022 Marketplace ref #: 23334a Purchase Order #: Supplier account #:
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Generate Purchase Order
Cancel

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

- All statuses
- Action required
- Ready for PO

Then click the Generate Purchase Order button on the front of the card.

2 Select one of your Gold supplier accounts to use on the purchase order.
Ensure the details on the screen are correct then click the Generate Purchase Order button.

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

- All statuses
- Action required
- Awaiting advice note

The purchase card will now display the PO number for the order, which you can check in Gold.

Generate Purchase Order ×

Part:	JD-0277454
Quantity:	1
Buying Depot:	1 - POOLE
Total Price:	135
Seller:	Tant's Tractor Co DND UAT
Supplier Account:	<input type="text" value="Select a Supplier Account"/>
Delivery Address:	GM604FL show more

Delivery & billing address will be taken from your marketplace profile.

Generate Purchase Order

5.4. Order Completion



Once you have generated your PO, the seller will receive an email advising them to generate their advice note, and send the goods and invoice to you.

Once they have generated their advice note for the sale, you will receive an email notification and the status of your purchase will update to Advice Note Generated. At this point you can expect to receive the goods and invoice, and receive via GRN as normal.

5.5. 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
Buyer requests parts for backorder on a parts advice or workshop job	Your parts have been requested	New request received – you need to accept or reject
Seller accepts request for parts	Your request was accepted. Generate a PO.	
Buyer generates purchase order		Order number available – you need to generate an advice note
Seller generates advice note	Seller has generated advice note, expect to receive goods and invoice	
Buyer cancels	Order cancelled	Order cancelled
Seller declined	Seller declined – source parts from elsewhere	