Ampelius User Guide

Published: December 2016

Version 1.0

Contents

Overview

Welcome to the new Ampelius User Guide! This update is designed to help you quickly get familiar with the new layout and features introduced in December 2016.
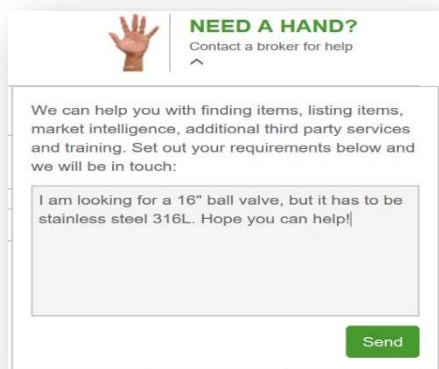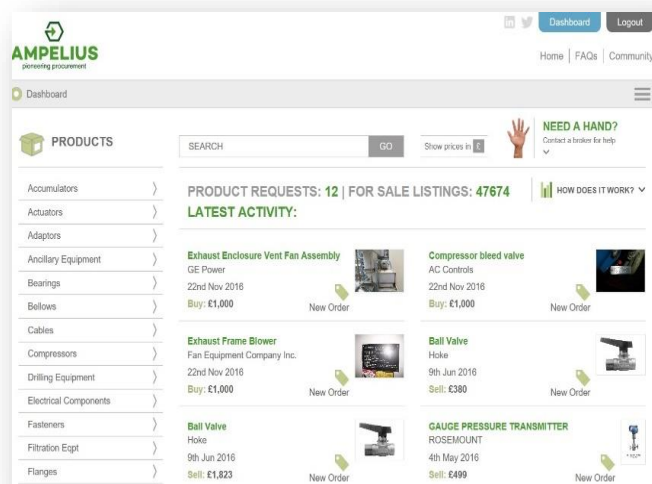
Using the Latest Activity Page

When you first log in you will find our new '**Latest Activity**' page.

Here we spotlight new items available and recent trading activity.

You can click on each activity to view more information.

Why not ask us to spotlight one of your own orders or to send a message out to the community.

Let us help.

We have made contacting us easier, just click on the '**Need A Hand**' button and send us your comments, questions and requirements.

You can alter the display currency using the '**Show prices in**' dropdown.

Guides to using the Navigation & Search features on this page are shown below.

Using the Navigation & Search Features

In response to user feedback we have replaced our filter and search features.

The new design makes it faster and simpler to find the items you want to trade.

To use the '**Navigation**' approach, start by selecting a '**Products**' category from the list on the left-hand site of the dashboard.

In this example, you have selected '**Valves**'.

We show the number of order results in the top bar to help you reduce the search size down to a more manageable level.

We have introduced a '**Specification**' and '**More Features'** section to help you find the Item using the attributes you need.
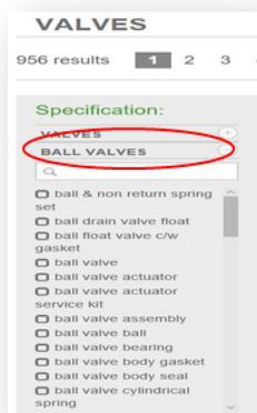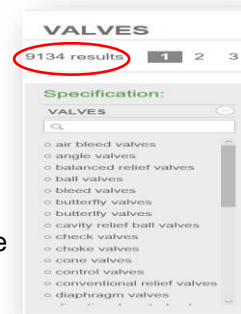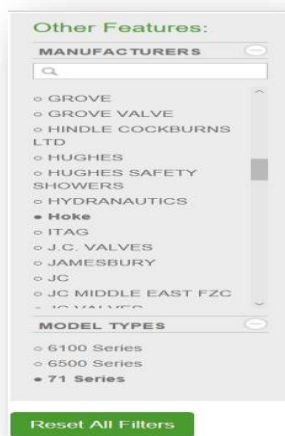

Select an equipment class in the '**Specification**' area e.g. 'Valves' >'**Ball Valves**'.

You can use the search box 🔍 feature to help you find the one you want.

Narrow the search further by selecting the component or components e.g. 'Valves' > 'Ball Valves' > '**Ball Valve Complete'**.
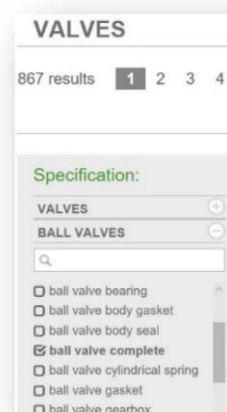
You can further narrow your search by selecting '**Other Features**' from a list of **Manufacturers**, **Model Types** or **Media**.

In this example, you have selected '**Hoke**' as the manufacturer and '**71 Series**' as the model type.

At any time, you can widen your search using the top menu bar grapevine.

Simply click on any of the relevant green sections to go back a step.

Dashboard / VALVES / BALL VALVES / Ball Valve Complete / Order 5729cc61a08ba

We have improved our '**Search**' function.

It will initially look for an exact match for the entry, then if insufficient results are returned it will look for close matching results.

We have added aliases for all SI and Imperial units of measurement, so you won't miss out if 'inch' is 'in' or 'inches' for example.
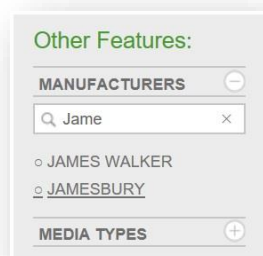
As with the navigation process the search can be further refined by choosing from the list of '**Other Features'**.

Using the Product Summary Display

We have introduced a new Product Summary display to provide a more detailed shorthand guide to the item's technical and brand attributes.

During our review process, we will associate each new order to a Product Summary to help ensure attributes are consistently represented.

Each individual buy and sell order is now shown in a price stack with the best buy and sell orders at the top.

In some Product Summaries, you will find a '**More Technical Data:**' feature. This gives you access to an engineering data archive.

Simply click on the logo to access this information. We have partnered with the engineering data experts **PhusionIM**, so that everyone can benefit from their archive of ISO standard engineering information and documentation. This greatly improves the consistency of data provided and helps fill in any gaps in subscriber's own inventory record keeping.

In the '**Product Summary Display**', your orders are highlighted with a **bold red border**.

Your colleague's orders are shown with a **bold green border**. You can click on '**Hide Own Orders**' or '**Hide Company Orders**' to temporarily remove these from the stack displays.

Using the Quick Buy & Quick Sell Features

We have made it easier to start or join in the price negotiation for an item.

At the bottom of each price stack you will find a '**Quick Buy**' and '**Quick Sell**' button.

If you want to buy an item, but don't want to pay the best sell price listed, just click on the '**Quick Buy**' button and the entry template will appear.

Add a price and click on '**Set Live**' to join the stack.

Alternatively add more details to your order by clicking on the '**More Information**' dropdown.

You repeat the same process to add a '**Quick Sell**' order to the market.

Using the Order Details Display Features

Whenever you click on a price block in the stack you will access the '**Order Details Display**'. Here you will find the full order information guide.

This area displays unique information such as delivery terms, location and specific supporting documentation.

You can start a transaction from here by clicking on the '**Start Transaction**' button.

Click '**Back to Listings**' to take you to the '**Product Summary Display**' if you want to compare the item with others in the stack.

At the base of the '**Order Details Display**' you will still find our '**Queries**' feature.

This allows you to message the buyer or seller directly or to review previous queries and comments.

The order buyer or seller will receive an email alert when you click on the '**Submit**' button.

POTENTIAL MATCHES   ∨

585bdf0ab700e - Conventional Relief Valve, Crosby P/N: 9511017A   Select
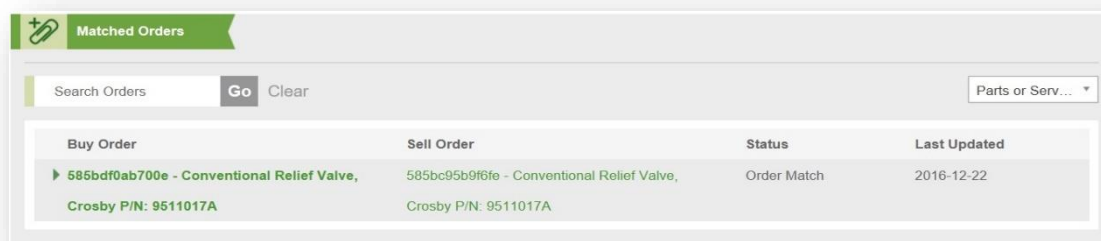
In '**Order Details'**, you can link your buy order with a sell order and vice versa to make it easier to find in future. We call this '**Matching**'.

Simply select the order to link in your account, from the dropdown provided, and click on the '**Select**' button.

All Orders
Your Orders
Company Orders
Matching Orders
Transactions
My Details

Whenever you need to track progress on queries or raise a new query simply click on the menu icon and select '**Matching Orders**' from the dropdown list.
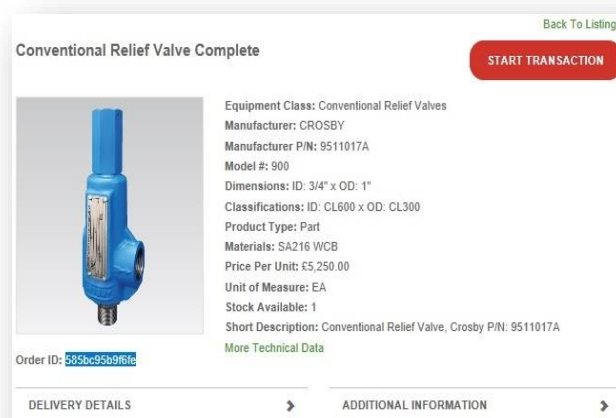
All your matched orders are displayed next to you own counter order with your order highlighted in **bold**.

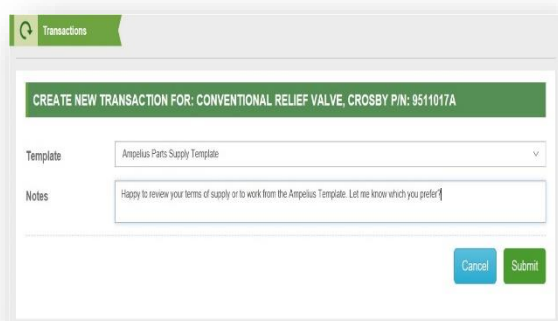| Buy Order	Sell Order	Status	Last Updated
585bdf0ab700e - Conventional Relief Valve, Crosby P/N: 9511017A	585bc95b9f6fe - Conventional Relief Valve, Crosby P/N: 9511017A	Order Match	2016-12-22

How to Start a Transaction

We make the process of concluding a transaction very flexible and clear.

To start, click on the '**Start Transaction**' button in the '**Order Details Display**' of the order you wish to sell to or buy from.

Back To Listings

Conventional Relief Valve Complete   START TRANSACTION

Equipment Class: Conventional Relief Valves
Manufacturer: CROSBY
Manufacturer P/N: 9511017A
Model #: 900
Dimensions: ID: 3/4" x OD: 1"
Classifications: ID: CL600 x OD: CL300
Product Type: Part
Materials: SA216 WCB
Price Per Unit: £5,250.00
Unit of Measure: EA
Stock Available: 1
Short Description: Conventional Relief Valve, Crosby P/N: 9511017A
More Technical Data

Order ID: 585bc95b9f6fe

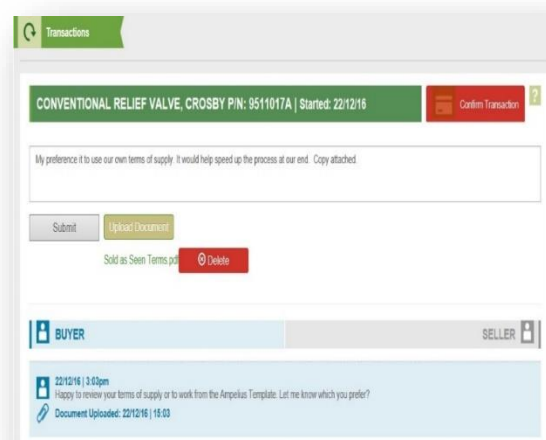DELIVERY DETAILS   >   ADDITIONAL INFORMATION   >

You will be redirected to a page that allows you send an initial message to the seller or buyer. Our standard supply template agreement will show. You can replace this with you own terms at the next step in the process.

Use the platform to exchange documents, clarify delivery details and to discuss other terms and conditions of supply.

Use the comments box and '**Upload Document**' feature to communicate.

When all supply terms are agreed and the bilateral supply contract is executed, click on the '**Confirm Transaction**' button and we will send you notice of how much, if any, commission is owed.

On most occasions the selling company will pay the commission so do not be surprise if nothing is due.
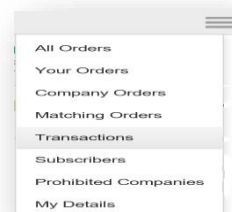

At the end of the process you will retain a completed transaction record to help with future auditing.

To find every Transaction use the menu 'hamburger' icon and select '**Transactions**'.
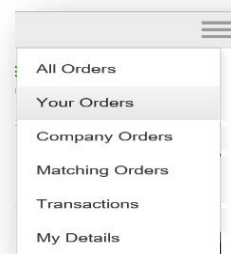

10

Using the Order Management Features

Click on the menu icon and select '**Your Orders**' or '**Company Orders**' to view the listing of each order you or your colleagues have added.

If you require more guidance on importing bulk data or making bulk changes to your existing data, please refer to our '**Ampelius Data Import User Guide'**.

This takes you to the '**My Orders**' screen where you can withdraw the order from the market by clicking on '**Put On Hold**' or make changes to the order by clicking on '**Edit**' or delete the order.

Use the '**Search Orders**' function and filters to narrow down the list of items.

You can also add new individual orders by clicking on the '**Add Order**' button.

This takes you to the '**Order Entry**' screen where you get to choose the type of order you wish to raise. Just click on the radio buttons and click '**Next**'.
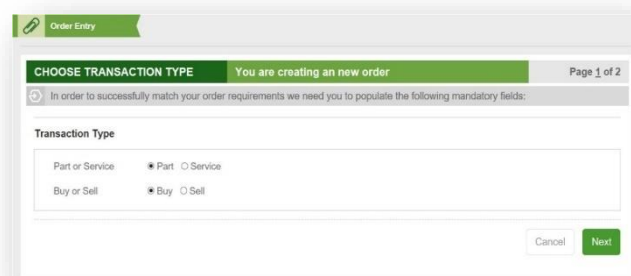
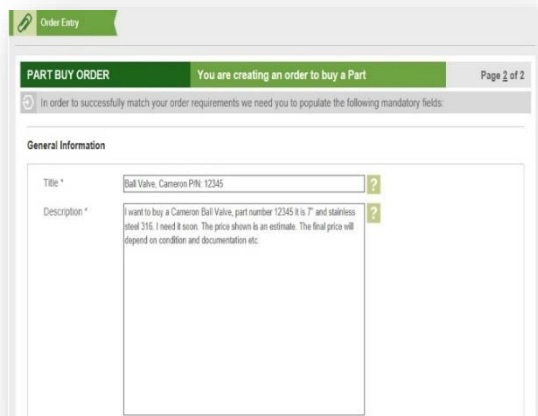The next step in the order entry process is to complete the template. The top section is mandatory. The '**Title**' helps us associate the item with an existing entry or helps us establish a new entry. Try using the following convention: "Component Name", "Manufacturer", "Model Type", "OEM Part Number" e.g. '**Ball Valve, Cameron P/N: 12345**'

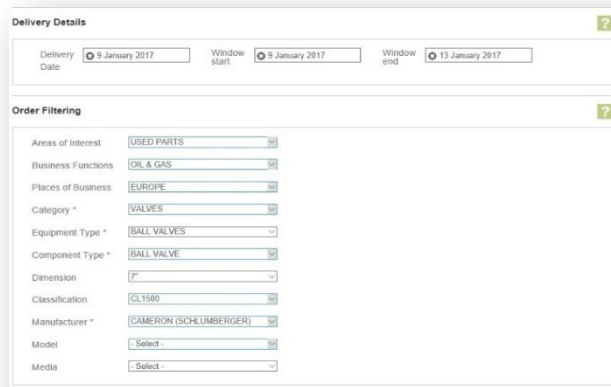Enter '**1**' as the Quantity and the Units.

Enter the Value and Currency.

If you require more than one unit of the item enter the figure in the '**Required Amount**' section.

Choose your preferred Allocation of Commission from the dropdown list. Our preference is '**Seller**' so that the seller pays all the commission owed and can make provision for this in their price.

If this is an order to buy an item enter a '**Delivery Address**' or use your company address by selecting the default.

Enter an '**Order Expiry Date**', this defines how long the order is shown the market. Alternatively click on default to make this 90 days.

When the delivery timings are important you enter these in the '**Delivery Details**' section. The '**Order Filtering**' in the '**Order Entry Screen**' does not have to be completed but may speed up our review process.
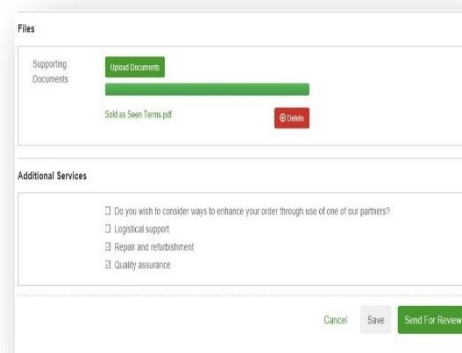
All these entries can be amended at any time.

Lastly you can add any Word or PDF documents to the order and indicate what aspect you require our support in addressing.

To finish click on the '**Send For Review**' button to start the Ampelius process or if you want to come back to work on it later click on the '**Save**' button.

All manually entered orders are reviewed by Ampelius in the first instance so that we can bring consistency to the representation and make any technical data associations that are available.

You are notified by email alert when the review process is completed and the order is '**Approved**' i.e. ready for you to add to the market.
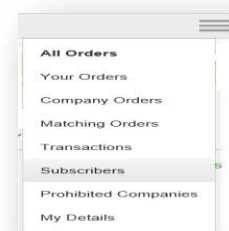
Using the Company Administrator Subscribers Feature

If you are the company administrator there are a few more features to consider.

If you want to add other subscribers to your account or review their activity it is simple and easy. Use the menu icon on the tool bar to select '**Subscribers**'.
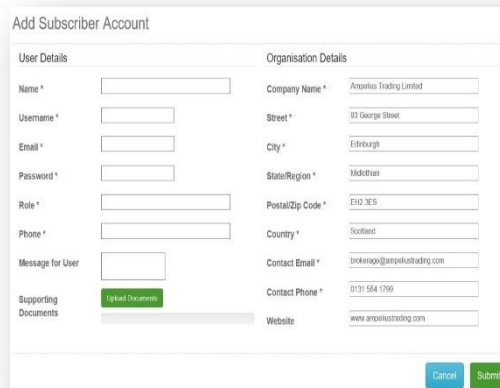
The '**Company User Accounts**' area will be displayed.

This shows you a list of current company account users and the status of their access. The '**Confirmed**' status indicates they have completed the email activation step and we have enabled their access. To add another user, click on the '**Add Subscriber'** button.

The '**Add Subscriber Account**' page will appear.

Fill in the details of the user, the company details will be pre-populated.

Add any documentation, such as an Ampelius procedure or site use policy using the '**Upload Documents**' button.

When completed click on '**Submit**'.

Using the Company Administrator Prohibited Companies Feature

You can add companies to a list that you do not wish to trade with. Use the menu icon on the tool bar to select '**Prohibited Companies**'.
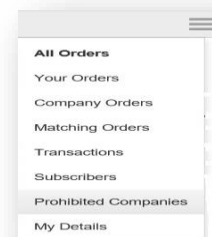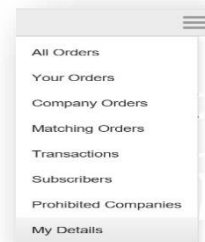

The '**Prohibited Companies**'

screen will appear.

To add or remove a company from the list just click on the box and select the one you want from the dropdown to add or click the '**x**' next to the company name to remove.

To save your changes click on the '**Update**' button.

Using the Company Administrator Change Company Details Feature

You can change the company details at any time. Use the menu 'hamburger'

icon on the tool bar to select '**My Details**'.

The '**Account Details**' page will appear.

Make the changes and click the '**Update**'

button to save.