



# Ampelius User Guide

Published: December 2016

Version 1.0

© Ampelius Trading Limited 2016. All rights reserved.

## Contents

Overview .....	3
Using the Latest Activity Page .....	3
Using the Navigation & Search Features .....	4
Using the Product Summary Display .....	6
Using the Quick Buy & Quick Sell Features .....	7
Using the Order Details Display Features .....	8
How to Start a Transaction .....	9
Using the Order Management Features .....	11
Using the Company Administrator Subscribers Feature .....	13
Using the Company Administrator Prohibited Companies Feature .....	14
Using the Company Administrator Change Company Details Feature.....	15

## 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.

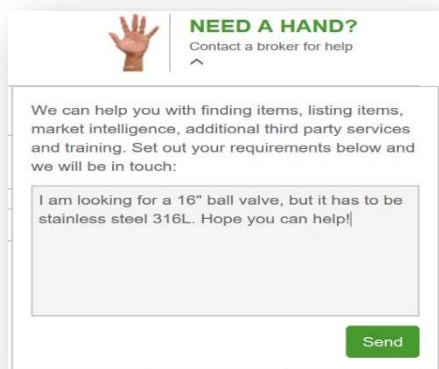
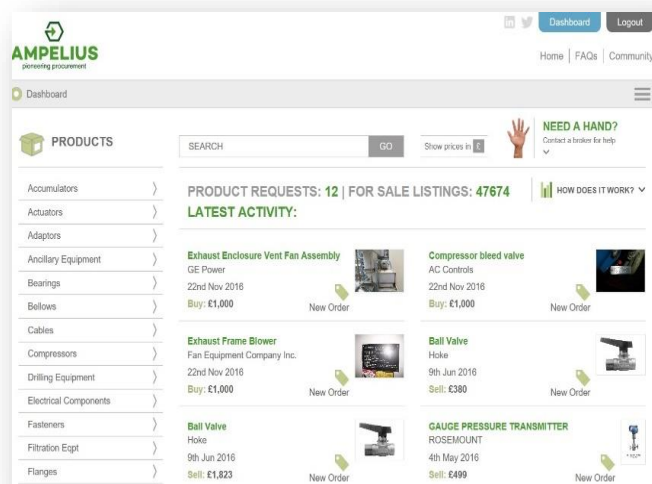
## Using the Latest Activity Page

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.

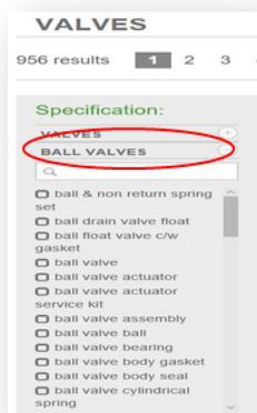
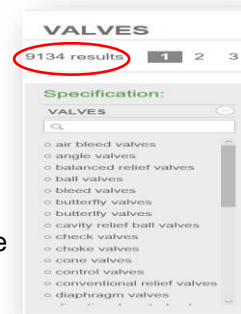
The new design makes it faster and simpler to find the items you want to trade.

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

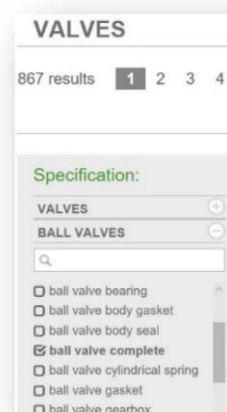
We have introduced a '**Specification**' and '**More Features**' section to help you find the Item using the attributes you need.

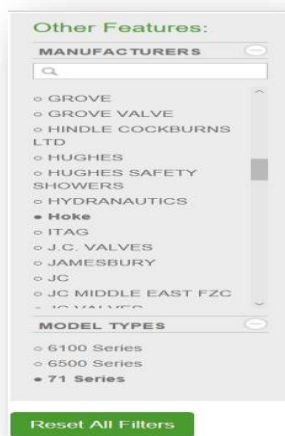


Select an equipment class in the '**Specification**' area e.g. 'Valves' > '**Ball Valves**'.

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.

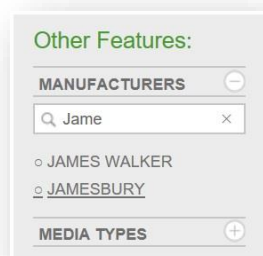
Simply click on any of the relevant green sections to go back a step.



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.



### Conventional Relief Valve Complete

**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  
**Condition:** Good  
**Materials:** SA216 WCB  
**Quantity:** 1  
**Unit of Measure:** EA



More Technical Data:



Conventional Relief Valve Complete		Buy Stack	Sell Stack
Equipment Class: Conventional Relief Valves		4,535	5,250
Manufacturer: CROSBY		2,750	5,500
Manufacturer P/N: 9511017A		1,100	25,000
Model #: 900			
Dimensions: ID: 3/4" x OD: 1"			
Classifications: ID: CL600 x OD: CL300			
Product Type: Part			
Condition: Good			
Materials: SA216 WCB			
Quantity: 1			
Unit of Measure: EA			
<p>More Technical Data:</p> 		Quick Buy	Quick Sell

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.

### Crosby - 9511017A

**Object Name:** Crosby  
**Model Number:** 9511017A  
**Associated Class:** Conventional Relief Valves  
**Status:** Valid  
**Comments:**





Technical Data (6)

Model Series (1)

Documents (8)


Components (8)

Conventional Relief Valve Complete		Buy Stack	Sell Stack
<b>Equipment Class:</b> Conventional Relief Valves <b>Manufacturer:</b> CROSBY <b>Manufacturer PIN:</b> 9511017A <b>Model #:</b> 900 <b>Dimensions:</b> ID: 3/4" x OD: 1" <b>Classifications:</b> ID: CL600 x OD: CL300 <b>Product Type:</b> Part <b>Condition:</b> Good <b>Materials:</b> SA216 WCB <b>Quantity:</b> 1 <b>Unit of Measure:</b> EA	 More Technical Data: 	4,525	5,250
		4,500	25,000
		4,400	99,999,999
		<b>Quick Buy</b>	<b>Quick Sell</b>

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

Conventional Relief Valve Complete		Buy Stack	Sell Stack
<b>Equipment Class:</b> Conventional Relief Valves <b>Manufacturer:</b> CROSBY <b>Manufacturer PIN:</b> 9511017A <b>Model #:</b> 900 <b>Dimensions:</b> ID: 3/4" x OD: 1" <b>Classifications:</b> ID: CL600 x OD: CL300 <b>Product Type:</b> Part <b>Condition:</b> Good <b>Materials:</b> SA216 WCB <b>Quantity:</b> 1 <b>Unit of Measure:</b> EA	 More Technical Data: 	4,525	5,250
		4,500	25,000
		4,400	99,999,999
		<b>Quick Buy</b>	<b>Quick Sell</b>

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.

Quick Buy	
Conventional Relief Valve, Crosby P/N: 9511017A <b>Set Live!</b>	
Required Amount:	Price (cost per unit):
1	
▼ More Information	


Quick Buy			
Conventional Relief Valve, Crosby P/N: 9511017A <b>Set Live!</b>			
Required Amount:		Price (cost per unit):	
1			
Allocation of Commission:		Delivery Address:	
Seller		90 George Street	
Currency:		Edinburgh	
GBP		EH2 3ES	
Expiry Date:		Window Start:	
2017-03-23		dd/mm/yyyy	
Delivery Date:		Window End:	
dd/mm/yyyy		dd/mm/yyyy	
Supporting Documents: <input type="text"/> <b>Browse</b>			
Additional Information:			
<input type="checkbox"/> Do you wish to consider ways to enhance your order through use of one of our partners? <input type="checkbox"/> Logistical support <input type="checkbox"/> Repairs and re-assembly <input type="checkbox"/> Quality assurance			

## 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.

**Conventional Relief Valve Complete**




**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  
**Condition:** Good  
**Materials:** SA216 WCB  
**Price Per Unit:** £99,999.999.00  
**Unit of Measure:** EA  
**Stock Available:** 1  
**Short Description:** Conventional Relief Valve, Crosby P/N: 9511017A  
[More Technical Data](#)

Order ID: 57286b2d22a0b  
Owner's Reference: YY02005583, 7200.

DELIVERY DETAILS	ADDITIONAL INFORMATION
	<b>Description:</b> CROSBY VALVE, VALVE PSV, INLET 3/4" 600# RF OUTLET 1" 300# RF. CYLINDER MATERIAL : CB BASE & DISC INSERT MATERIAL : SS GUIDE MATERIAL : SS SPRING MATERIAL : 17-7PH SS <b>Areas Of Interest:</b> NEW PARTS <b>Places of Business:</b> UK <b>Has The Part Been In Service?</b> No <b>Commission Allocation:</b> Seller

[Back To Listings](#)

**Conventional Relief Valve Complete**



**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: 585bc95b9f61c

**START TRANSACTION**

DELIVERY DETAILS	ADDITIONAL INFORMATION

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.

DELIVERY DETAILS	ADDITIONAL INFORMATION
<p><b>Buyer Queries</b> <span style="float: right;">Under Negotiation</span></p> <div> <p><b>22/12/16 Buyer 01</b> I require the part to be delivery to the US by mid February at the latest, is this possible?</p> <p><b>22/12/16 Admin:</b> Yes. We can take care of the delivery arrangements and costs. The item is available for sale until the end of March.</p> <p><input checked="" type="checkbox"/> Owner responded</p> </div> <div> <p><b>22/12/16 Buyer 02</b> Is it available on an exchange basis? We have a new one on order but the lead time is 6 months.</p> <p><b>22/12/16 Admin:</b> We can do this on a used for new exchange basis. If you want to proceed start the transaction and add the exchange terms. Alternatively we have our own existing exchange terms.</p> <p><b>22/12/16 Admin:</b> We can get the item to most locations within a week.</p> <p><input checked="" type="checkbox"/> Owner responded <span style="float: right;">See All</span></p> </div> <p>Ask a question...</p> <p style="text-align: right;"> <input type="button" value="CLEAR"/> <input type="button" value="SUBMIT"/> </p>	





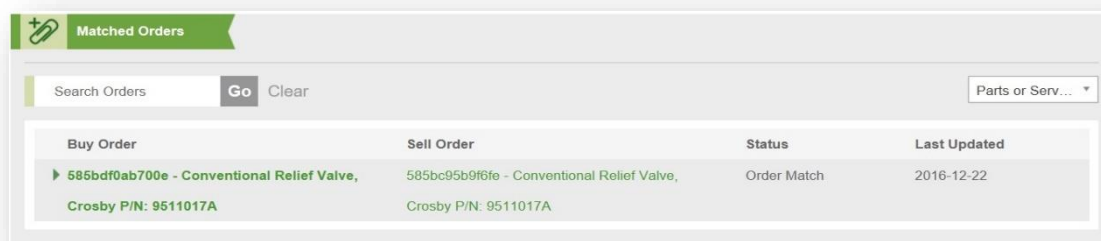
In '**Order Details**', you can link your buy order with a sell order and vice versa to make it easier to find in future. We call this '**Matching**'.

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

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.



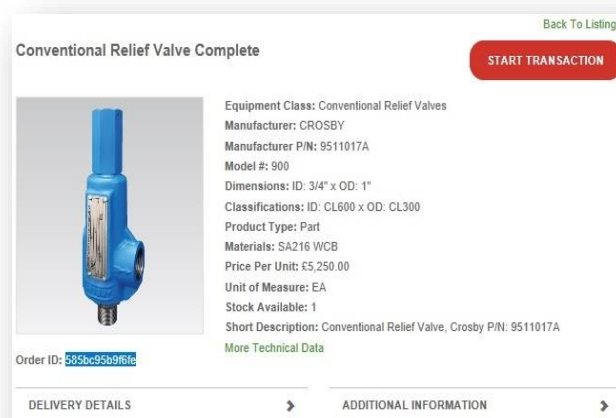
All your matched orders are displayed next to you own counter order with your order highlighted in **bold**.

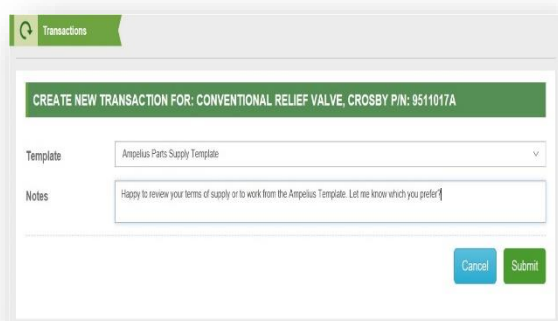


## How to Start a Transaction

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.





The screenshot shows a web interface for creating a new transaction. At the top, a green banner reads 'CREATE NEW TRANSACTION FOR: CONVENTIONAL RELIEF VALVE, CROSBY PIN: 9511017A'. Below this, there is a 'Template' dropdown menu set to 'Ampelius Parts Supply Template'. A 'Notes' text area contains the text: 'Happy to review your terms of supply or to work from the Ampelius Template. Let me know which you prefer?'. At the bottom right, there are 'Cancel' and 'Submit' buttons.

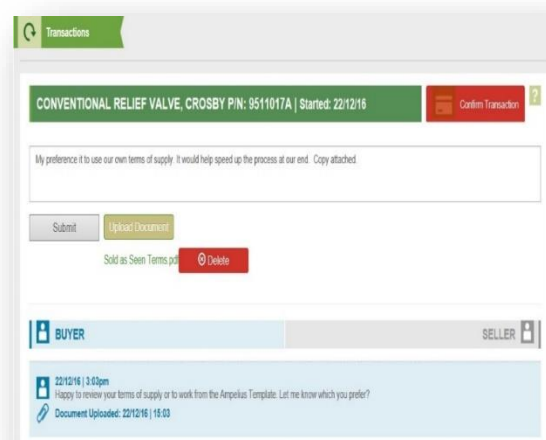
You will be redirected to a page that allows you send an initial message to the seller or buyer. Our standard supply template agreement will show. You can replace this with you own terms at the next step in the process.

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.



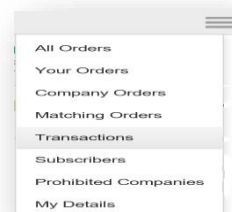
The screenshot shows a transaction confirmation page. At the top, a green banner reads 'CONVENTIONAL RELIEF VALVE, CROSBY PIN: 9511017A | Started: 22/12/16'. To the right is a red 'Confirm Transaction' button. Below this, there is a text area with the message: 'My preference is to use our own terms of supply. It would help speed up the process at our end. Copy attached.' Below the text area are 'Submit' and 'Upload Document' buttons. A status bar at the bottom shows 'BUYER' and 'SELLER' tabs. A chat log at the bottom shows a message from the buyer at 3:03pm: 'Happy to review your terms of supply or to work from the Ampelius Template. Let me know which you prefer?' and a document upload at 15:03.



The screenshot shows a transaction history page. At the top, a green banner reads 'CONVENTIONAL RELIEF VALVE, CROSBY PIN: 9511017A | Started: 22/12/16'. Below this, there is a 'Download Confirmation #00000006' button. The main area shows a list of transactions. The first transaction is 'James Eddie | Marathon Oil U.K. LLC - Completed' with a status of 'Completed'. Below this, there is a chat log showing a message from the buyer at 3:03pm: 'Happy to review your terms of supply or to work from the Ampelius Template. Let me know which you prefer?' and a document upload at 15:03.

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**'.

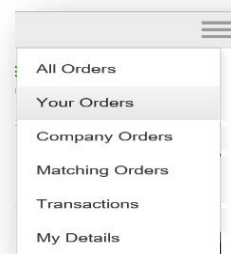


The screenshot shows a navigation menu with the following items: 'All Orders', 'Your Orders', 'Company Orders', 'Matching Orders', 'Transactions' (highlighted), 'Subscribers', 'Prohibited Companies', and 'My Details'.

## 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'**.



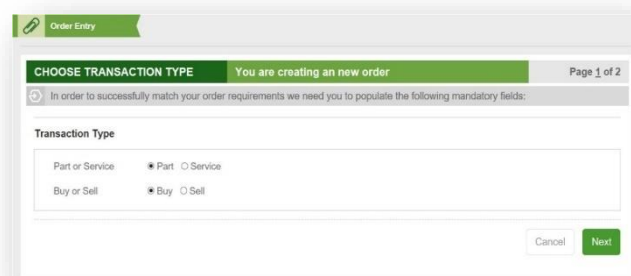
This takes you to the **'My Orders'** screen where you can withdraw the order from the market by clicking on **'Put On Hold'** or make changes to the order by clicking on **'Edit'** or delete the order.

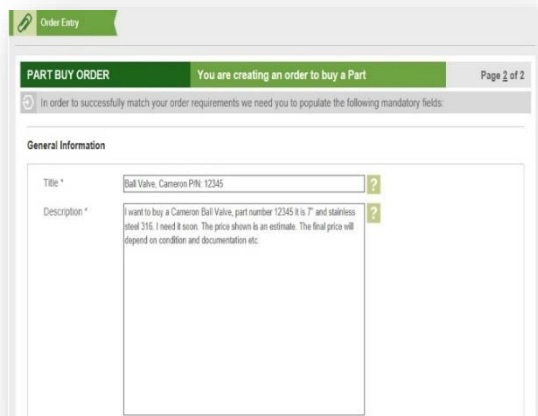
Use the **'Search Orders'** function and filters to narrow down the list of items.

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.

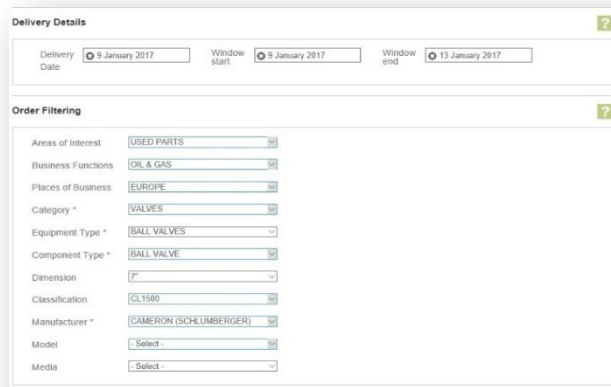
Enter the Value and Currency.

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.

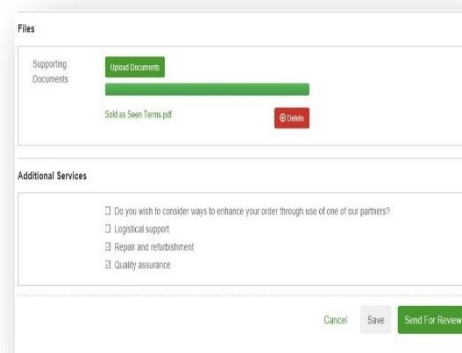
All these entries can be amended at any time.

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.

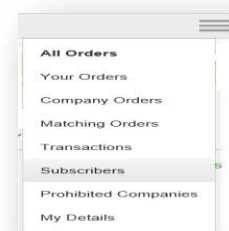


The screenshot shows a 'Files' section with a 'Supporting Documents' area containing a 'Send Documents' button and a 'Send as Seen Terms.pdf' file with a 'Send' button. Below this is an 'Additional Services' section with a list of checkboxes: 'Do you wish to consider ways to enhance your order through use of one of our partners?', 'Logistical support', 'Repair and refurbishment', and 'Quality assurance'. At the bottom right are 'Cancel', 'Save', and 'Send For Review' buttons.

## 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**'.





Company User Accounts

Add Subscriber

Test Add - Ampelius Trading Limited	Confirmed
Doug Morrison - Ampelius Trading Limited	Confirmed
Peter Hall - Ampelius Trading Limited	Pending email confirmation
Steve Pearson - Ampelius Trading Limited	Pending email confirmation
Alex Hayward - Ampelius Trading Limited	Pending email confirmation
Brian Jobling - Ampelius Trading Limited	Pending email confirmation
Maria Williams - Ampelius Trading Limited	Confirmed
Alan Harrold - Ampelius Trading Limited	Confirmed
Matthew Wright - Ampelius Trading Limited	Confirmed
Kevin Dolan - Ampelius Trading Limited	Pending email confirmation
Nichole Bailey - Ampelius Trading Limited	Confirmed
Martin Macdonald - Ampelius Trading Limited	Confirmed

The '**Company User Accounts**' area will be displayed.

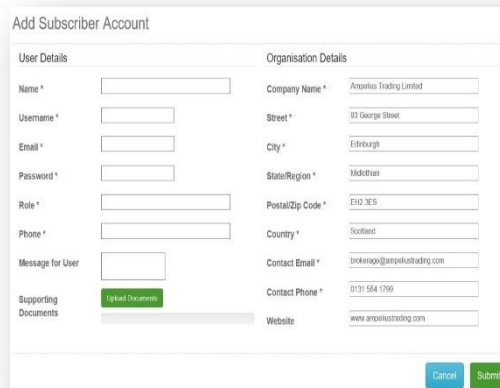
This shows you a list of current company account users and the status of their access. The '**Confirmed**' status indicates they have completed the email activation step and we have enabled their access. To add another user, click on the '**Add Subscriber**' button.

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

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

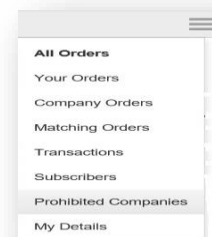

Add any documentation, such as an Ampelius procedure or site use policy using the **'Upload Documents'** button.

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'**

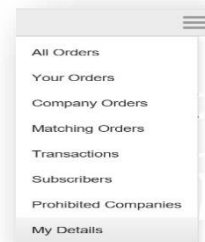
screen will appear.

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**'.



Account Details Cancel Update

User Details	Organisation Details
Individuals Name * <input type="text" value="Andy Taylor"/>	Company Name * <input type="text" value="Amelius Trading Limited"/>
Username * <input type="text" value="ataylor"/>	Street * <input type="text" value="93 George Street"/>
Email * <input type="text" value="ataylor@ampeliustrading"/>	City * <input type="text" value="Edinburgh"/>
Password <input type="password"/>	State/Region * <input type="text" value="Midlothian"/>
Role * <input type="text" value="Managing Director"/>	Postal/Zip Code * <input type="text" value="EH2 3ES"/>
<input type="text" value="0131 340 4344"/>	<input type="text" value="Golfwood"/>

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

Make the changes and click the '**Update**' button to save.