Oilbuyingclub.com

Powered by

buysta

Club Manager guide

January 2016

Version 3.0

Help and support is available from support@oilbuyingclub.com

Summary:

This document summarises the key activities undertaken by Managers using the OilBuyingClub (OBC) system.

The key activities are:

1. Managing Members.
2. Launching an order request.
3. Launching a supplier tender.
4. Picking a tender supplier and completing the order.

The OBC helps community Oil Buying Club managers administer their membership, gather orders and work with suppliers to ensure the process runs as smoothly and efficiently as possible.

Most members hear about their local club through word of mouth in the local area. Some new members find the club via Internet searches or local marketing leaflets. In all cases new members are asked to register through the main site. Club Managers are notified of new member applications and have the opportunity to review them before acceptance.

Club pages are managed through a Wordpress system; separate instructions cover the use of that.

All functionality is accessible from the Managers dashboard.

A few key points to note:

- A club can only be gathering one order at a time. Once an order has started it's not possible to start another one until the current order has been awarded to a supplier.

- It's not a lowest price wins process – the decision on who to give the order to is entirely the Club Managers; it should be based on a combination of price and service.
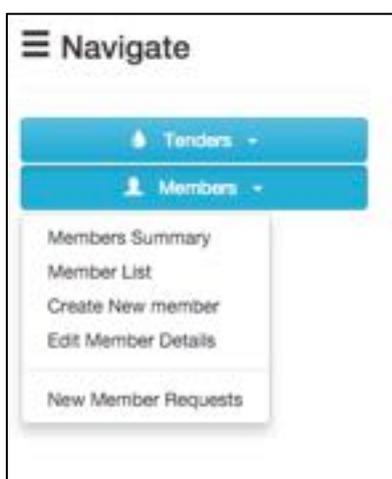
1: The Dashboard
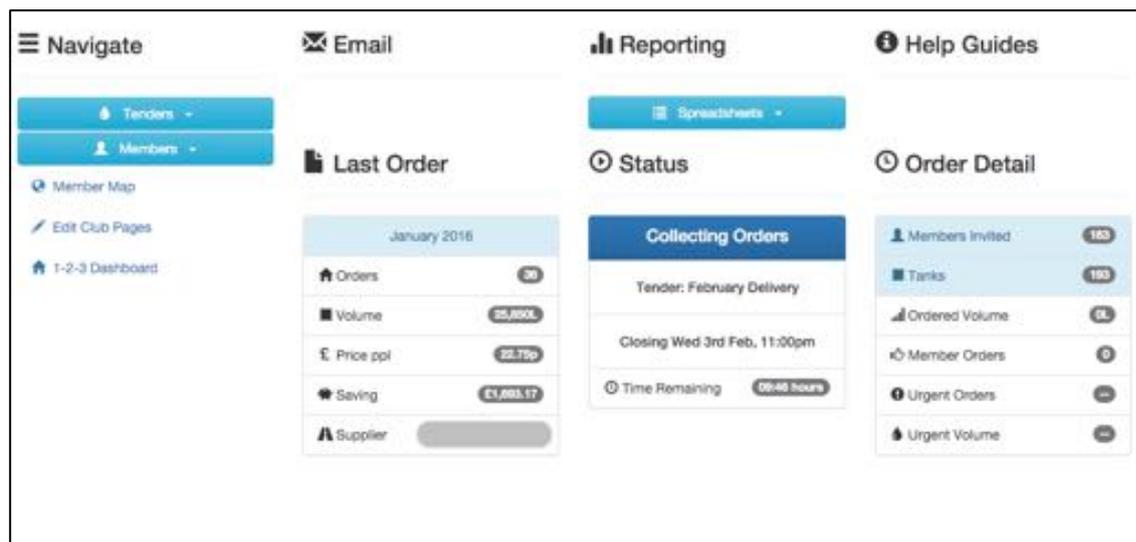
On the left are the key activities under the headings Tenders and members. Below this is an option to view club members on a map, edit the club pages in wordpress and use the old style dashboard.

The three central columns deal with the latest club status; from the left the last completed order, in the center the current orders status and on the right the details of the current order.

The spreadsheet function allows historic order information to be viewed and downloaded.

2: Managing members.

The left column of the dashboard deals with membership. The options are:

- See a summary of members on a map.
- Review and edit all club members in a list.
- Add a new member.
- Edit member details (can also be done via the list).
- Manage new member requests.

The key items of functionality are editing member details and reviewing new member applications.

2.1 Editing member details

Select 'member list'

	Name	Address	Email	Postcode	Actions
☐	Roy		mem_2007_sesame4@oilbuying.club	WR11 7UB	✏ ❶
☐	Matt		mem_1909_louackland@oilbuying.club	WR11 7UZ	✏ ❶
☐	Anton		mem_2197_mimaran@oilbuying.club	GL20 7AH	✏ ❶

For information select the 'I' icon to edit select the 'pen'. On selecting edit the screen shows.

Member Details ✕

👤 Roy _____ Joined Dec 2014   ☑ Active

|			
Title	Mr	House/Street	
Forename	Roy	Address 2	
Surname		Address 3	
Known As		Address 4	
Email	mem_2007_sesame4@oilbuying.club	Postcode	WR11 7UB
Password	Optional - enter to change.	Landline	
Confirm	Confirm Password.	Mobile	N/A
	Minimum of 8 characters		

Update Member

Close

Every item of information on the screen is editable. **Only managers can edit an email ID.**

Once changes have been completed select 'update member'.

2.2 New Member Requests

Club managers are notified by email when a new member applies to join the club. Only members with a postcode within the club catchment can apply to join.

A manager can review new member applications via either the 'new member requests' option on the member dropdown or via the map. This example is shown using the map.
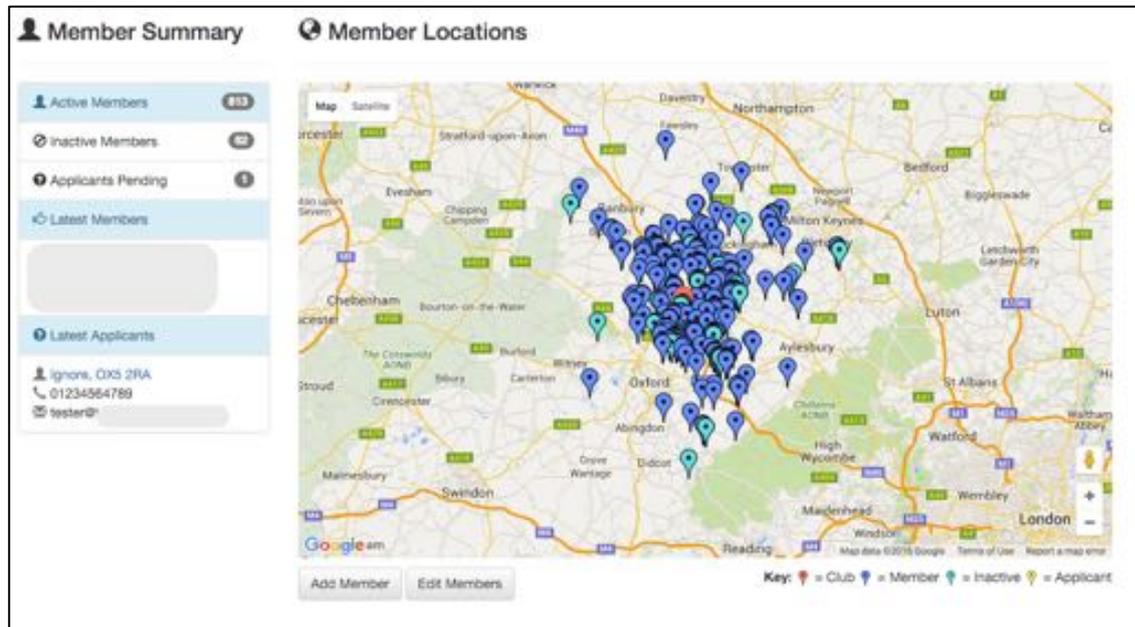
The latest applications highlights outstanding applicants.
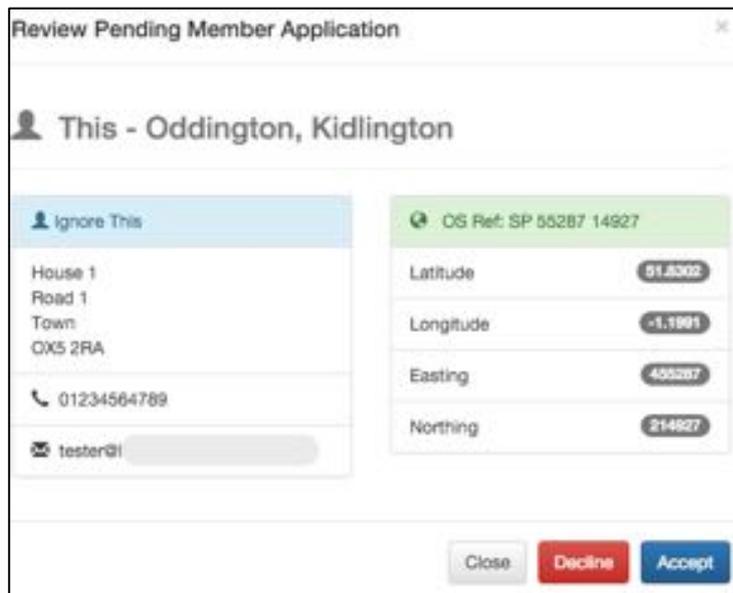
Clicking the applicant brings up a box with more information.

A manger can accept or decline.

If the application is accepted the member receives an email with account login details.

If the application is declined a request appears for a reason.

This reason is included in the email sent back to the applicant.

3. Managing Orders

A typical order process runs along a structured program of activities:

1. The Club Manager ask Members for details of their requirement – an initial e mail to all members with follow up reminders as the deadline approaches.
2. Members via Smartphones, Tablets and PC's place their requirements and receive a confirmation e mail.
3. Once the deadline is reached the individual orders are aggregated to the club order. The Club Manager provides suppliers with details of the order and invites prices by a deadline.
4. Suppliers price the order
5. The Club manager selects the supplier they wish to award the order to, the supplier is notified and provided with full order details by member. Members receive an e mail with supplier details including price, payment rules and delivery information.
6. Delivery is completed and the system updated.

3.1 Member request

From the Tender drop down select 'create new tender'. This will bring up the tender launch screen, as shown below.


Fill in the boxes – it's a good idea to give the order request a name that makes sense to members – it will appear in their email subject line. There is room to include a message if you wish to highlight something to members.

The cut-off time is always 11pm on the date you set.

Select order request and members will receive an email notifying them of the request and cut-off.

3.2 Order build.

As members place orders so the tally for the club grows – you can see this on the central panel of the dashboard. In this case one order for 1,000ltrs has been placed so far.
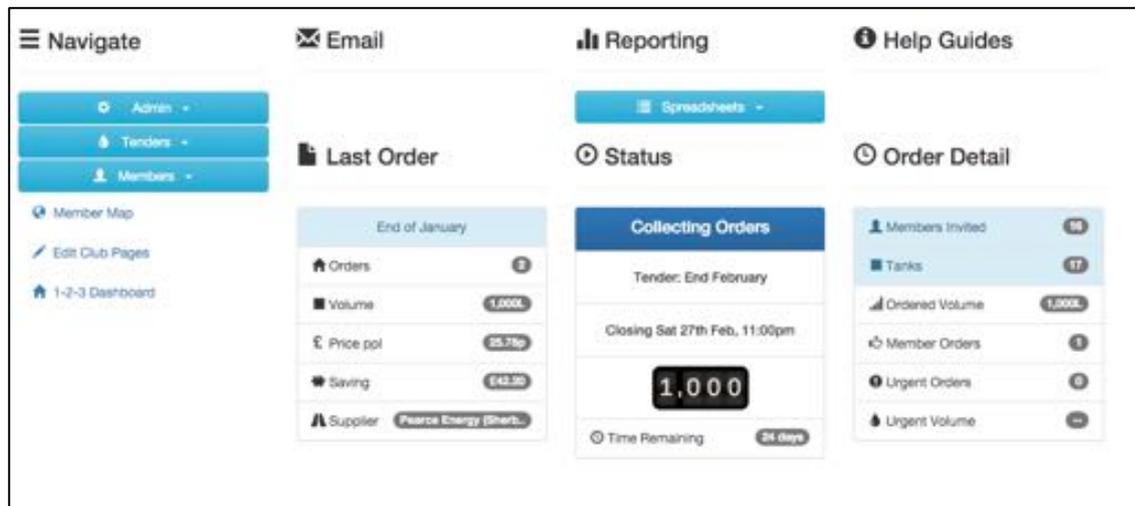
Every time a member places a request they receive a confirmation email.

3.3 Order Cut-Off

Once the cut-off has been reached the dashboard indicator will change to 'launch tender' – select this and move to the launch screen.
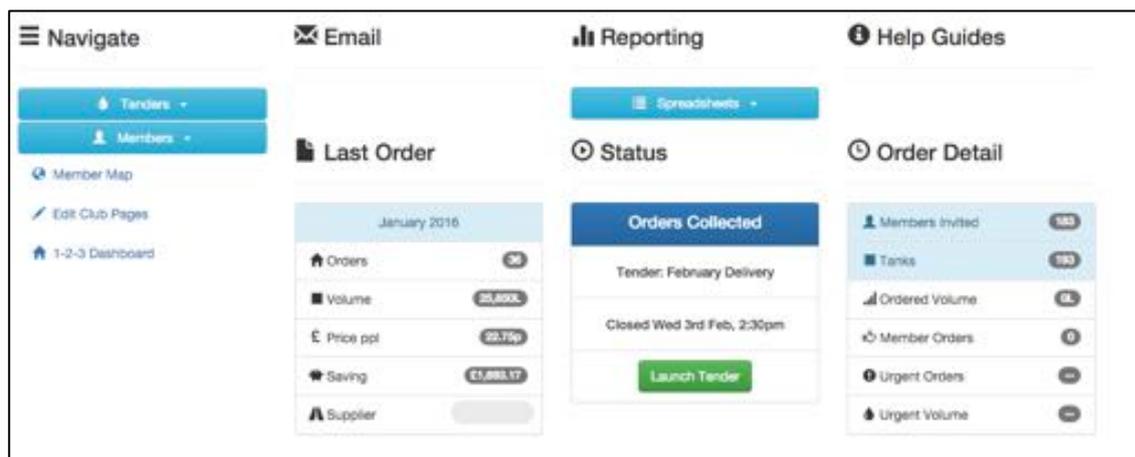
3.4 Launch a tender.

The launch screen includes a summary of the orders placed, detailed member information and the requirements for the tender.

If any member has been unable to enter an order as Club Manager a manual entry can be made before the tender is launched.

Once all orders are input complete the tender details:

- A start and finish date – normally no more than 48hrs apart. The system will randomly select a finish time between 3.30pm and 4.00pm on the close day.
- The Clubs preferred delivery timelines – Suppliers don't have to stick to this but it acts as a guide.
- Select from the list of available suppliers those that you want to send the order to.

Then launch the tender. Suppliers will receive an email notification that our tender is online. They can login, see details and place prices.

As a supplier places a price you will receive an email notification of the detail.

Your dashboard will update to reflect the fact a tender is underway – it will show the lowest current bid.
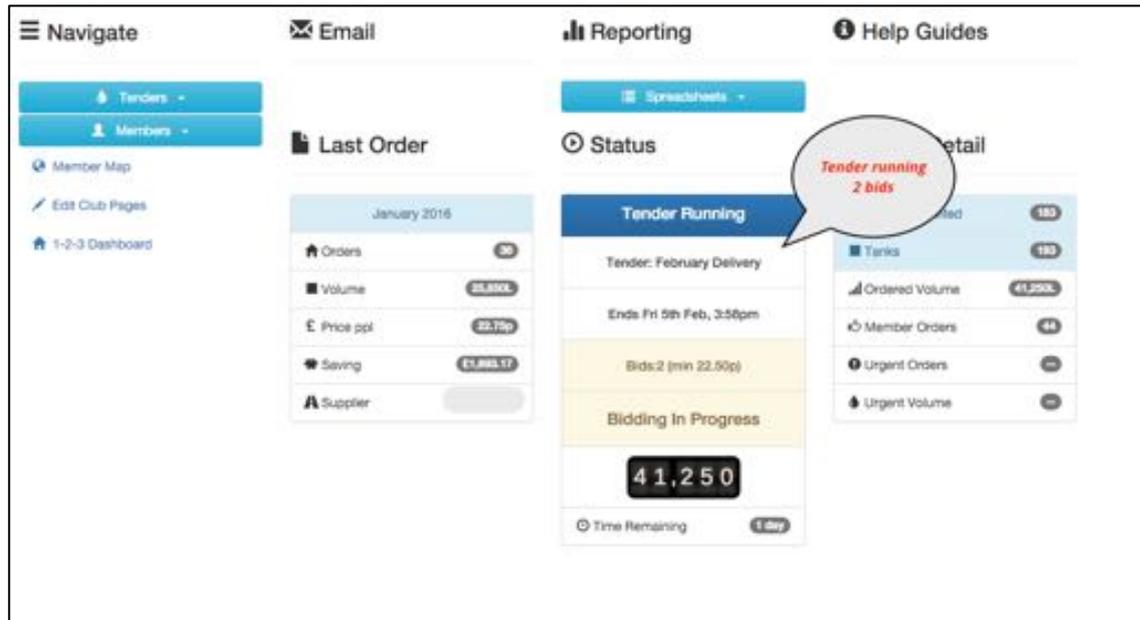
3.4 Complete a tender and choose a Supplier.

When the tender completes the dashboard status will change to 'Tender has Ended'.
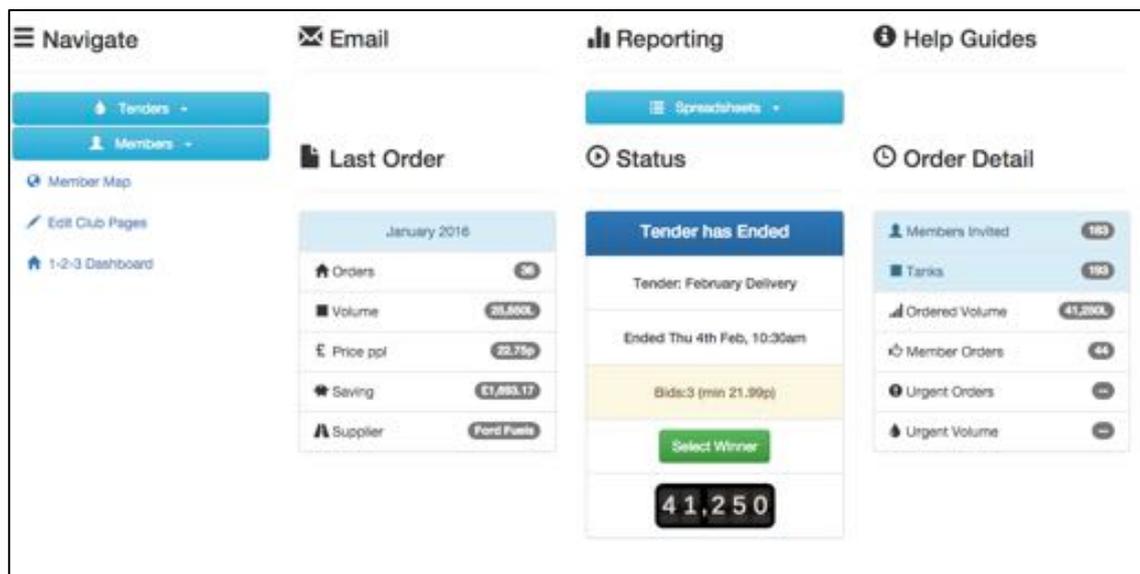
Choose 'select winner' to bring up details of the available suppliers and prices.

The decision on who is selected as the winning supplier is entirely up to the Club Manager.

Select a Supplier by using the 'Declare Winner' button.

On declaring a winner the following takes place:

1. The winning supplier is notified and supplied with the complete delivery details for the Club order. The detail takes the form of either a printed manifest or a spreadsheet.
2. The other suppliers are notified that they haven't been successful on this occasion.
3. Club members receive a confirmation e-mail with details of the supplier, prices and contact information. This is issued to them at 11am on the next business following the awarding of the order to a supplier.
4. The Order moves to the 'completed tenders' section of your dashboard and you are now able to start the order process again.

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