Oilbuyingclub.com

Powered by

buysta

Club Manager guide

January 2016

Version 3.0

Help and support is available from support@oilbuyingclub.com

<u>Summary:</u>

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.

<u>1: The Dashboard</u>

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A Members -	Last Order		O Status	Order Detail	
Member Map	Last order		O DIAIGO	O Older Detail	
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1-2-3 Dashboard	A Orders	0	Tender: February Delivery	Tanks	0
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	· Saving	C1/663.17	O Time Remaining	O Urgent Orders	0
	A Supplier			Urgent Volume	0

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	11	Email	Postcode	Actions
0	Roy /			mem_2007_sesame4@oilbuying.club	WR11 7UB	/ 0
0	Matt			mem_1909_louackland@oilbuying.club	WR11 7UZ	/ 0
	Anton .			mem_2197_mimaran@oilbuying.club	GL20 7AH	1.0

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

Roy	Joined Dec 2014	4		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			

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.

 This - Oddingtor 	I, Ridnington	
1 Ignore This	@ OS Ref: SP 55	287 14927
House 1	Latitude	G12572
Hoad 1 Town	Longitude	(1,1901)
0.052R4	Easting	455207
C 01234004709	Northing	214827
@ testeral		

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.

a a upur tank is too far	fram aur augallaria dalluar i baundan i	
s.g. your tank is too lar	rom our supplier's delivery boundary.	
	0	
	Confirm	

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.

ate February Delivery	0	This will be our last order in February.	0
Kerosena 📴 🕜			
1 February 2016	0		
			Order Reques
			(Concession)

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.

Navigate	🖾 Email		II Reporting	Help Guides	
O Admin +	Last Order	ra	 Spreadsheets - Status 	Order Detail	
Q. Member Máp	End of Ja	nuary	Collecting Orders	1 Members Invited	0
 Edit Club Pages 	A Orders	0	Tender: End February	Tanka	Ø
A 1-2-3 Dashboard	Volume			d Ordened Volume	
	£ Price pol	655	Closing Sat 27th Feb, 11:00pm	45 Member Orders	0
	· Saving	@	1,000	O Urgent Orders	0
	A Suppler Gala	Energy (Sherb.)	O Time Remaining	Urgent Volume	0

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.

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A Merchers -	Last Orde	er	Status	Order Detail	
Member Map	000 000 000 000 000 000	59.	997 C 7 C 7 C 7 C 7 C 7 C 7 C 7 C 7 C 7		
Edit Club Pages	Januar	y 2016	Orders Collected	1 Members Invited	0
A 1-2-3 Deshboard	A Orders	0	Tender: February Delivery	Tanks	0
	Volume	E	10 S	d Ordered Volume	0
	£ Price ppl	000	Closed Wed 3rd Feb, 2:30pm	xð Member Orders	0
	· Saving	(1)11117	Launch Tender	O Urgent Orders	•
	A Suppler			Urgent Volume	0

3.4 Launch a tender.

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

Fuel Type	Tender Title				
Kerasene	February Delivery				
Tender Start Date *	Tender End Date *	Order Requests	s Summary 🔞		
4 February 2016	5 February 2016	Invitations: 1	83 members, 193 ta	nks	
Delivery Commencing *	Delivery Completion*	Orders Requ	ested: 44		
8 February 2016	19 February 2016	Volume (L):	41,250		
Select Suppliers you wish	to include in the Tender*	0			
O B	(Evesham)	0		٥	
The last order before East	ær.			0	
			BKX.	Cancel Tendert	Launch Tendert
Check / Amend tank orde	r volumes for Tender	-			distant Frank Grounds
Member Tank to	Owner	M011 700	Volume (L) • •	Urgent Ab	ditives Tails Capacity
My Default Tank		W911 707	1000		1500
My Default Tank		GL20 7AH	250		1200
My Default Tank		WR117UB	0		1000
My Default Tarik		GL20 7PH	0		1500

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.

Navigate	🖾 Email		II Reporting	Help Guides
Tenden - Member - Member Ap	Last Orde	ar	E Speechheets -	Tender running
/ Edit Club Pages	Januar	y 2016	Tender Running	2 bids
1-2-3 Dashboard	A Orders	0	Tender: February Delivery	Tarks (D)
	Volume			Condensed Volume
	£ Price ppl	-	Ends Fri 5th Feb, 3:58pm	🖒 Member Orders 🛛 🔘
	· Saving	(1111)	Bids:2 (min 22.50p)	O Urgent Ordens
	A Supplier		Bidding In Progress	Urgent Volume
			41,250	
			O Time Remaining	0

3.4 Complete a tender and choose a Supplier.

When the tender completes the dashboard status will change to 'Tender has Ended'.

■ Navigate	🖾 Email		II Reporting	Help Guides	
🌢 Tenders -			🗄 Spreadsheets +		
1 Manbars -	Last Orde	er	O Status	O Order Detail	
Member Map					
🖌 Edit Club Pages	Januar	y 2016	Tender has Ended	1 Members Invited	•
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	Volume			I Ordered Volume	(150)
	£ Price ppl	-	Ended Thu 4th Feb, 10:30am	ið Member Orders	0
	Saving	(\$1,083.17)	Bids:3 (min 21.99p)	Urgent Orders	0
	A Supplier	(Ford Pumin	Salart Minner	Urgent Volume	0
			41,250		

Choose 'select winner' to bring up details of the available suppliers and prices.

ic: February Deli	wery k± 127 Er 2016-02-08 Delivery end i	d Date: 2016-02-64 10:30:00 inte: 2016-02-19	0
ume Breakdown i Type: Karosawa ek 1911, ta 1290c - 19 ndard Delvery: 19 , 19	Total Volume Requested: #1,298 200 L Tanks 1211L+ 98,898 L 10 Lawer 42 Tanks	C Tarks Feb 750C (10.000 Fillus Dehery (10.1001.)	4.) www.2.flanks.)
vest Bid plant Stats «Price::::::::::::::::::::::::::::::::::::	Net Order Vel Min Price (20,00) Aug Price Aug 0750.: (36,759)	er (000700) Price (25) (23.35p) Nov 8750, (2	89) Serigpi: (3.799) (899)
i B. Die only order we w	d be raising the month.		
	× £9,281.25		
and C	Chill fam: 22.Mp	Delivery Start, Mon. 05/05/2016	0+81C#81328%
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one I optier Kote muni	Exercised Face: US.My Pagement Terms: Sciencely on account (): £9,322.50 ColorSec 20.00p Exercised Terms: 10.00p Exercised Ter	Delivery Lost for the BD/BPH Impert within 3 days Delivery Sort, for SD/BD/BPH Delivery Sort, for SD/BD/BPH Delivery Ind. for SD/BD/BPH Delivery and for Sb/BD/BPH	Codit Cards: Free Codit Cards: (10.00 Codit Cards: (10.00 Codit Cards: (10.00 Codit Cards: Free Artic: Net Accepted
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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.