

Barter Software User Manual



XO Limited

Version Three

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Contents

Barter Software User Manual	ii
Contents	iii
Preface	vii
Why do some pages look different?.....	viii
Conventions	viii
Differences in wording	viii
What will I see?	ix
Exchange Setup	x
Logging In	11
Administration Site	12
Exchange Setup Guide	13
Checklist	14
Administration Site in Detail	20
Search	21
Advanced Search	22
Transactions	28
Plastic Transaction Cards.....	31
Member	34
Cheque Books	35
CRM.....	38
<i>Adding CRM Events:</i>	40
Members	43
Member Details.....	45
<i>Access:</i>	46
<i>Rating:</i>	46
<i>Cards:</i>	47
<i>Telephone Banking:</i>	47
<i>Quick Tasks:</i>	47
<i>Documents:</i>	48
<i>Accounts:</i>	50
<i>Contact:</i>	51
<i>Notes:</i>	53
Payments	54
<i>View Cash Receipts:</i>	54
<i>View Auto Payments:</i>	56
<i>Add New Cash Receipts:</i>	57
<i>Add New Auto Payment:</i>	60
<i>Process Auto Payments:</i>	62
Rating & Trade Status.....	63
<i>Trade Status Setup:</i>	63
<i>Manage Trade Status & Rating:</i>	64

<i>Delete Rating:</i>	66
New Plastic Transaction Card.....	67
Saved Searches.....	68
Transactions.....	69
Add Batch Adjustment.....	70
Add Transaction.....	73
<i>Add New Manual Transaction:</i>	73
<i>Add New Card Transaction:</i>	79
Recent Transactions	81
Online Transactions	82
Disputed Transactions.....	83
Pay Anyone	85
Set Default Pricing Plan.....	86
View	88
Exchange.....	89
Checklist	90
Contact Details.....	92
Default Settings.....	93
Feature Settings.....	94
<i>Phone Banking</i>	95
<i>Maximum Credit Balance</i>	96
Payment Methods.....	97
<i>Credit Card:</i>	97
<i>Direct Debit</i>	98
<i>Cheque/Posted Payment:</i>	98
Sales Team Commission Settings.....	101
Pricing.....	102
Account Adjustment Type	103
Fees & Rates	105
Pricing Plan.....	107
Members by Pricing Plan.....	109
Staff.....	110
Clients List	111
Exchange Staff.....	112
Re-Assign Accounts.....	115
Sales Team	116
Broker	119
Associate Broker	120
Staff Permissions	121
Reports	122
Reports	123
<i>Common Information Reports:</i>	124
<i>Advanced Reports:</i>	124
Statements	127
Communication	129
E-Mail	130
Newsletter	131

SMS.....	134
Directory.....	135
Directory Alert Activation.....	136
Directory Listing Print.....	137
Directory Listing Reset.....	138
Edit Alert Message.....	139
View/Hide Categories.....	140
Content.....	141
Content Text.....	142
<i>Contact Us</i>	142
<i>FAQ</i>	143
<i>Welcome Message</i>	144
<i>Help</i>	145
<i>Privacy Policy</i>	146
<i>Registration Details</i>	147
<i>Registration Message</i>	150
<i>Security & Compatibility</i>	151
<i>Terms & Conditions</i>	152
Currency.....	153
Direct Debit.....	154
E-Mail Templates.....	155
<i>E-Mail Templates - Description</i>	156
IVR E-Mail Templates.....	161
Front End Customisation.....	162
<i>Main Menu Panel</i>	163
<i>Main Menu Opening Image</i>	163
<i>Search Panel Opening Image</i>	164
<i>Login Panel</i>	164
<i>Registration Panel</i>	166
<i>Bookmark Panel</i>	167
<i>Category Panel</i>	168
<i>Side Panel</i>	170
<i>New Listings, Statistics and Browse-by Panel</i>	172
<i>Footer Links Panel</i>	173
Front End Images.....	174
Required Contact Details.....	175
Show Empty Category.....	176
Statement Settings.....	177
Supplier Settings.....	179
Item.....	180
Item Settings.....	181
Products.....	182
Service.....	183
Listings.....	184
Approving Items.....	185
Logs.....	186
Merchant Members.....	187
Office Staff.....	188

Translation	189
Default Language.....	190
Pending Translations.....	191
Translate a Page	192
Translate SMS.....	194
Translate Category	195

Preface

Congratulations on becoming a member of the fastest growing barter-exchange network in the world! This document is intended to ease your introduction into our software. We do this by providing you with a checklist of tasks to complete that will result in your exchange being active, and your business online.

Following completion of this checklist we recommend that you explore the software and familiarize yourself with its functionality. This User Manual provides detailed instructions on how to use our software, and is designed to enhance your understanding of the functions available.

For a checklist of tasks that need completion before your exchange becomes active please see the Exchange Setup Guide.

For any questions or queries you feel are not addressed by this manual please contact tim.gordon@barter-software.com.

Preface

Why do some pages look different?

As with any piece of software, the XO system is constantly being updated with new features and user interface enhancements. Because of this there may be functions available in the software that are not detailed in this manual, or look slightly different. We frequently update this user manual as new features and changes are made. Contact XO to obtain the latest version of this manual.

Conventions

Term	Description
Front End	The B2B trading site
Back End	The XO Administration site

Icon	Description
	Example
	Important
	Note
	Tip

Differences in wording

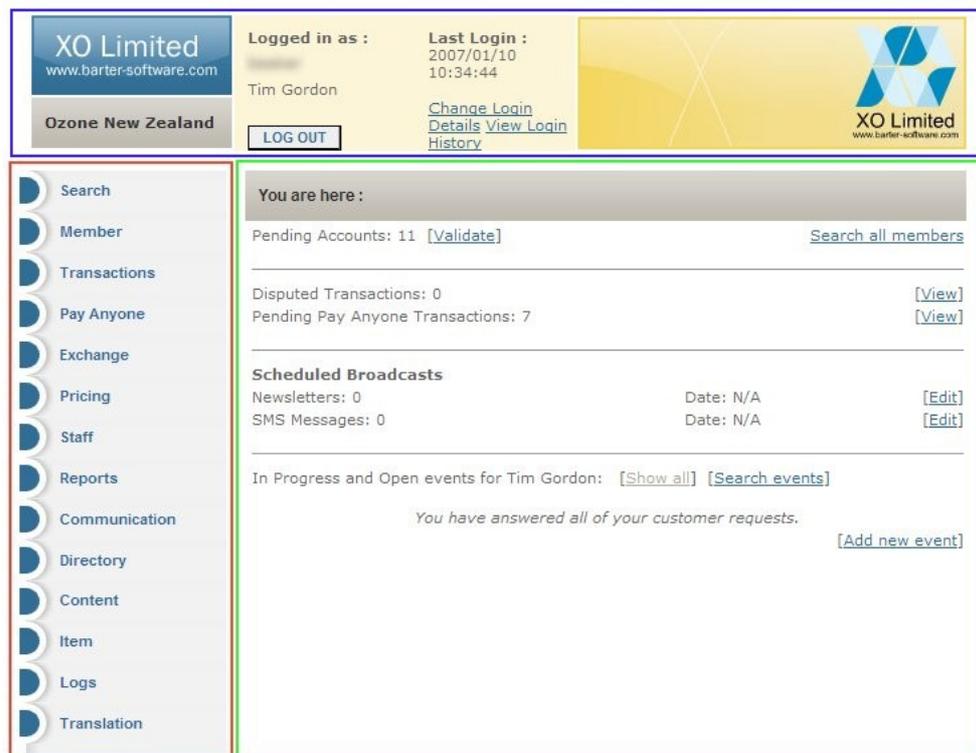
Because the XO system allows you to translate virtually every aspect of the system into your own language or modify existing languages, some terms, directions, instructions and screenshots may appear different in your system to this user manual. If you find your self stuck, please contact your project manager for more information.

Preface

What will I see?

Throughout the application there are a number of interface features that you should become familiar with before proceeding with this guide. Taking note of these visual cues will help you navigate and use the software productively and efficiently.

There are three main areas to the software interface.



1. Main Menu

This is located on the left-hand side of the screen. This is the main tool for navigating around the software. When the term Main Menu is used later in the document, it will be referring to this part of the interface.

2. Content Area

This dominates the majority of the page and is where your requested information is displayed. At the top of this area is a bar called the breadcrumbs bar. This shows the user where about in the application they currently are.

3. Banner

This is the upper part of the interface. It displays the username and name of the user currently logged in. It also gives the user an option to change their details and view their login history.

PART ONE

Exchange Setup

CHAPTER ONE

Logging In

Until you have setup your own website i.e. www.myexchange.com and integrated it with our barter-exchange network you can log in to the generic home page by going to <http://myexchange.xolimited.com/xoadmin>. You will be presented with your administration log in page

Contents:Administration Site

Logging In

Administration Site

To login to the Administration Site:

 **NOTE:** Please ensure that your computer is connected to the Internet.

1. Start your web browser such as Internet Explorer or Firefox.



2. Enter the URL in the browser's address bar. This could be your exchange's URL such as (www.myexchange.com) or the default <http://myexchange.xolimited.com/xoadmin>.

 **TIP:** Create a bookmark of the site for easy future access.

3. Use the username and password you signed up with to log in to the Administration Site.



Exchange Administration

This website is optimized for Internet explorer. Some features may not be available in Netscape or Firefox

Please select your exchange:
 

Username
Password

[I have forgotten my password](#)

[Make this page my Homepage](#)
[Add this page to my Favorites](#)

This page and all subsequent pages are SSL Secured.
Please take note of the SSL 'padlock' icon at the bottom right of the browser window.

CHAPTER TWO

Exchange Setup Guide

This section provides a list of tasks to complete that will result in your exchange being active and online. The setup process is detailed fully in the Software Training Manual which can be requested from XO Software.

A short explanation of each task is provided. For further instructions on how to complete each task, refer to the contents or the index to continue reading on that specific topic.

Contents

Checklist:

- Logging in to the Administration Site
- Exchange Contact Details
- Payment Methods
- Sales People
- Members Fees & Rates
- Registration Fees
- Terms, Conditions & Policies
- Customizing the Front End
- Using your own domain name
- Setup a test account
- Import your members into the system
- Other Features
- Registering and Verifying Users
- Statement Set Generation

Exchange Setup Guide

Checklist

Logging in to the Administration Site:

Until you have setup your own website (www.myexchange.com) and integrated with our barter-exchange network you can log in to the generic home page by going to <http://myexchange.xolimited.com/xoadmin>. Once you have logged in you can access the full set of functionality.

For more details on how to start and logon to our site see Chapter One.

Exchange Contact Details:

You should double check to make sure your exchanges details have been entered correctly. Exchange details are used by customers to contact your exchange. Exchange Contact Details are located under Exchange on page 92.

Payment Methods:

You need to make sure that you can receive commission payments in the forms that you need to (Credit card, direct credit, and post payment/Cheque). See page 97 for more information.

 **Important:** Your bank account details need to be entered into the system if you want to be able to receive payments via direct credit. Accepted Payment Methods is located under Exchange in the Main Menu.

Sales Staff:

Each business that signs up to your exchange must have an assigned Salesperson before they can use their account. A Salesperson is a staff member that the client will deal with when they have problems or queries.

Upon exchange creation there are no salespersons created or assigned. You must create a Salesperson out of Admin members, and then assign a Salesperson to your members. There are several steps you must go through in order to achieve this. See page 112 for more information.

Exchange Setup Guide

Checklist continued

1. **Sales Commission Rates:**

Sales commission rates determine the amount that a salesperson will make when their clients buy or sell anything online. You must create sales commission rates. There are different rates depending on whether the client buys or sells, and whether the deal completed in cash or barter. Sales Commission Rates are located under Staff Mgmt in the main menu.

2. **Create a Salesperson:**

You must assign “salesperson status” to your staff members. In order to do this you need to select the appropriate staff member from the list, and select a commission rate (that you created in step 1).

3. **Assign a Salesperson to a member:**

Once you have successfully created some sales persons, you can assign them to the clients/members of your exchange (although there are other steps to go through before this, so an explanation is given later in this document).

Members Fees & Rates:

In order to make money through commission, you must assign fees and commission rates to your clients (member mgmt/Members Fees & Rates). This must be done before any clients start using the online system. Fees and Rates are located under Pricing on page 102.

Registration Fees:

If you wish to charge registration fees you need to assign them using the Edit Registration Details page. See Edit Registration Details under Content on page 141 for more information.

Terms, Conditions & Policies:

You must check the Terms & Conditions, and the Privacy Policy and change them if need be. Terms & Conditions and Privacy Policy are located under Content Mgmt in the main menu.

Exchange Setup Guide

Checklist continued

Customizing the Front End:

You can completely change the look and feel of your exchange web site. Initially when your online exchange is created, it will look like our example site 'Green Dollars' however it is easy to change the look and feel to images and colour schemes you want. Just replace the existing pictures with ones of the same exact dimensions (width and height). See page

Using your own domain name:

When you first start using our system you can access your exchange through our default domain name (www.xolimited.com) however it is likely will want to change that domain name to one of your own. In order to do this you must register your domain name and then make it point or refer to our server.

To do this you have two options:

Option One:

You can transfer your domain to the XO Limited registrar.

- This option also will allow your domain name to appear in the user's browser i.e. www.myexchange.com and your customized graphics will appear on the homepage.



EXAMPLE: See <http://www.greendollars.co.nz>

- We can also make a customized homepage which will appear only for your exchange if you wish to.
 - This option has the added benefit that you will no longer have to pay fees to the company which you bought your domain from (domain registrar).
-

Exchange Setup Guide

Checklist continued

Option Two:

You can use the XO domain name server.

You can change the domain name server (DNS) to use our especially designed domain name server capable of handling multiple domains from various exchanges

- This option is best if you wish to keep your domain with your existing domain name registrar.
- This option also allows your domain name to appear in the user's browser for example <http://www.myexchange.com> and your customized graphics will appear on the homepage.

Procedure for Option One:

1. We will lodge a request to transfer your domain to our registrar, once this is done we will email you and you must logon or call your domain registrar and authorize this request.
2. Emails for your domain name such as info@myexchange.com will now come to our server. To ensure you receive all emails related to your domain we can:
 - a. Setup a web mail account for you which will all emails will be directed to. For example [<anything>@myexchange.com](mailto:anything@myexchange.com) will be directed to this mailbox
 - b. Redirect certain email addresses to specific email addresses. For Example info@myexchange.com redirect to info@gmail.com and bob@myexchange.com to bob@gmail.com.

Procedure for Option Two:

1. Tell us your domain name which you wish to add to our name server.
 2. Emails for your domain name such as info@myexchange.com will now come to our server. To ensure you receive all emails related to your domain we can:
 - a. Setup web mail account for you which will all emails will be directed to. For example [<anything>@myexchange.com](mailto:anything@myexchange.com) will be directed to this mailbox
 - b. Redirect certain email addresses to specific email addresses for example, info@myexchange.com redirect to info@gmail.com and bob@myexchange.com to bob@gmail.com
-

Exchange Setup Guide

Checklist continued

3. Once we have received these details from you we will setup your account on our name server. We will send you an email once this is done



NOTE: Please do not change the DNS with your registrar before you have been informed of the change.

4. Contact the company which you bought your domain from (domain registrar) and set the name servers to:

Name Server One: ns1.orcon.net.nz

Name Server Two: ns2.orcon.net.nz



IMPORTANT: Changes to a domain's name servers can take up to 24 - 48 hours to propagate, this means your hosting or other domain features will not work during this propagation time.

Setup a test account for prospective members:

If you want people to be able to view products or services and generally want people to be able to explore the software through your exchange website, then you will need to setup a test account. The test username and password commonly used are 'test drive' for both the username and password. This account should obviously not have buy/sell permission.

Import your members into the system:

If you have existing members in your exchange, you may want to import them into the software system. If you want to do this, you must send us a CSV file with their details. The file must be in a specific format. There is a sample CSV file available so that you have a guide when creating your own file. If you haven't received the files, please contact us on support@barter-software.com and we will forward them to you.

Exchange Setup Guide

Checklist continued

Other Features:

If you want to receive Cheque books, use SMS banking, telephone banking or have any other features enabled for your exchange, please contact your project manager.



NOTE: Some parts of the system require ongoing attention from your exchange staff.

Registering and Verifying Users:

As members sign up to your exchange through the web site, they will need to have their details verified and their accounts activated by your staff. The Member page allows the ability to change members' details such as setting member's accounts to "valid". This can be found under Members in the Main Menu.

Accessing the Member page will display a list of members. Select a member and you will see their account details. You need to assign a "sales rep" who will take care of this member. Assigning a commission rate to the account as well as monthly and annual fees do not need to be set. To activate this account set the account to 'valid'.

PART TWO

Administration Site in Detail

CHAPTER THREE

Search

From Search an admin user can search for a specific company and access company details.

This feature also allows a user to view member Directory Listings. Once a search is complete the user can then select various businesses and generate a customized report containing information about each selected business. This report can then be printed or directly emailed to any member.

This generated report shows the business name, contact details and business details as per the Directory Listing text entered by the business.

The creation of customized trading reports for each member of the barter exchange is a function designed to be used by the Sales Team help increase trade by their clients.

Contents

Advanced Search	22
Transactions	28
Plastic Transaction Cards.....	31

Search

Advanced Search

The creation of customized trading reports is an important function and is designed to be used by Account Managers to help increase trade by their clients. By searching using Barter Balance, a sales person can enter a minimum balance of -\$10,000 and a maximum balance of \$00.00. This will search for all members that are in debt to -\$10,000. These members can then be promoted to other members who are in credit.

You can narrow down your search by using this function in conjunction with other search components such as Directory Listing and after finding the right member, add them to a customized trading report.



EXAMPLE: If one of your members calls their account manager and explains they are going on a trip, but need their car serviced first, and need a place to stay when they get there, as well as a few good restaurants at which they can have a family dinner, and any other entertainment venues you can think of, then a sales person might do the following.

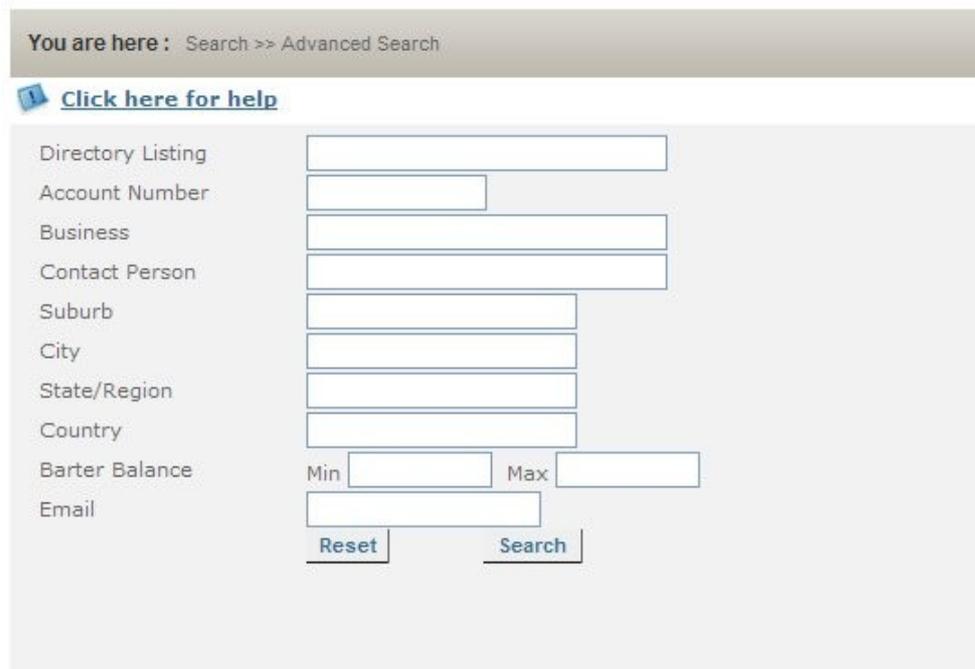
1. Search for a few car mechanics that are in debt in the local area so that your member can choose one to visit and do a check-up their car before the trip.
 2. Search for a few hotels that are in debt at the location your member wanted to stay.
 3. Search for some restaurants that are in debt, or in need of more trade.
 4. Search for Entertainment Venues that are in debt.
 5. Email the report to your member and check up on them in a few days. They may have additional requests.
-

Search

Advanced Search continued

To Access Advanced Search:

1. To access the Advanced Search feature click on Search in the Main menu and select the members link. This will load the Advanced Search page shown below.



The screenshot shows the Advanced Search interface. At the top, a breadcrumb trail reads "You are here : Search >> Advanced Search". Below this is a blue link "Click here for help" with a question mark icon. The main search area contains several input fields: "Directory Listing", "Account Number", "Business", "Contact Person", "Suburb", "City", "State/Region", "Country", "Barter Balance" (with "Min" and "Max" sub-inputs), and "Email". At the bottom of the form are two buttons: "Reset" and "Search".

To Search for a member:

There are various ways a search can be performed. Filling more than one field will narrow down the search. You can fill in as little or as much information as you wish to refine the search. Leaving all fields blank and clicking the Search button will produce the entire list of companies.

 **Example:** Filling in the word bike under Directory Listing will show all businesses that have something to do with bikes in their directory listings. However if you also enter New Zealand in the Country box, your search will be narrowed down to include only businesses within New Zealand. An explanation of each search field is provided on the next page.

Search

Advanced Search continued

To Search by Account Number:

The Account Number is a unique number that identifies a business.

Some businesses may not know their account number so you may wish to search by the Business Name or the Contact Person instead.

To Search by Business:

Enter the name of the business you would like to find.

To Search by Contact Person:

This function produces results based on the contact people recorded for a business.

To Search by Suburb, City, State/Region, or Country:

This enables you to search for all members in the selected Suburb, City, State or Country. Used in conjunction with other search fields it can help narrow down your search to a specific location.



EXAMPLE:	Contact Person:	Mike
	City:	Auckland

This will produce a list of all people named Mike in the city of Auckland.

To Search by Directory Listing:

This allows you to search through all company and directory listings, and find businesses based on a specific key word. For example typing “health” in the field would generate results regarding companies associated with health or health products.

To Search by Email:

This feature allows you to find companies based on an email address. This is often useful if emails bounce due to spelling errors or if that member changed their email address and you require a different way to contact this member. Searching by their email will bring up other contact details allowing you to get in touch and update their email address with a correct one.

Search

Advanced Search continued

Working with search results:

After entering the relevant information in the chosen fields, click on the Search button. The results from your search will be displayed below.

You are here : Search >> Advanced Search

[Click here for help](#)

Directory Listing

Account Number

Business

Contact Person

Suburb

City

State/Region

Country

Barter Balance Min Max

Email

1

<input type="checkbox"/>	Heading	Business	Barter Balance	Do Not List	Directory Listing	Trade Status
<input type="checkbox"/>		Business: A1 Smash Repairs AccountNumber: <input type="text"/> Is Valid: No Contact Person: John <input type="text"/> Tel: 09- <input type="text"/> Fax: 09- <input type="text"/> Mobile: <input type="text"/> Email: <input type="text"/> @xtra.co.nz Website: n/a Address: Onehunga Auckland	\$21 <input type="text"/>		Excellence in accident repairs. Insurance and private work. Towing service available.	Trade Status Unknown
<input type="checkbox"/>		Business: Abundant Health Ltd. AccountNumber: 00470 Is Valid: Yes Contact Person: John <input type="text"/> Tel: 07- <input type="text"/> Fax: 07- <input type="text"/> Mobile: 027- <input type="text"/> Email: <input type="text"/> Website: <input type="text"/>	-\$16 <input type="text"/>		<input type="text"/> manufactures the highest quality skin care, hair care, personal care and natural health products using the	Trade Urgently needed

To navigate through search results:

You will have various options available for moving through your search depending on the number of results. If the results fill up more than your onscreen space scrollbars will appear on side of your screen. You can use these to scroll through results. If there are more than a page of results a numbered navigation tool will be shown at the bottom left hand side of the page. Simply click on the number for the list of records on that page.

Search

Advanced Search continued

To select search results:

Search results must be added to a report in order to be emailed to members. Once you find the company records you were looking for you can select them by clicking on the checkbox beside each one. This will highlight the company record as shown below.

				Worldwide Appeals.	
<input checked="" type="checkbox"/>		Business: AOK Trading Mart AccountNumber: [REDACTED] Is Valid: Yes Contact Person: John O'Kane Tel: 04-[REDACTED] Fax: 04-[REDACTED] Mobile: [REDACTED] Email: aok1 [REDACTED] Website: n/a Address: PO Box 14-215 Kilbirnie Wellington	\$1 [REDACTED]	Quality second hand furniture & bric a brac,	Trade Status Unknown
		Business: [REDACTED]		American-style	

To add a selection to report:

After selecting all required company records as outlined above, click on the Add to Report button. This will take you to a report summary page that shows a list of all companies in the current report. Note that you can perform multiple searches and add results from those searches to the same report before proceeding further.

Working with results added to a report:

When you are finished searching and adding companies to a report you can review the selections. A summarized list of companies and their directory listings is shown below. There are a range of options available.



NOTE: Most commonly the reports generated are emailed to customers.

Generate Report	Remove All	CSV	XLS	<input type="text"/>	Email
Heading	Business	Directory Listing			
	AOK Trading Mart	Quality second hand furniture & bric a brac,			
1					

Search

Advanced Search continued

To E-Mail the report:

The selection can be emailed directly by typing an email address in the field and clicking on the Email button. Emails sent to the client will have each business' contact information, Directory Listing text etc added to them.

To generate a report:

A report can be generated by clicking the Generate Report button. The report is now displayed inside a new browser window as shown below.

CUSTOMISED TRADING REPORT

Company	ABC Trading Ltd
Description	Quality second hand furniture & homeware
Business Contact Person	John Brown
Business Days	Tue,Wed,Thu,Fri,Sat.
Business Hours Week Days	9am - 5pm
Business Hours Saturday	9am - 5pm
Business Hours Sunday	am - pm
Web Site Address	www.abc.com
Email Address	john@abc.com
Phone	01 123 4567
Toll Free Phone	1800 123 456
Fax	01 123 4567
Toll Free Fax	1800 123 456
Emergency Mobile	01 123 4567
Street	123 Main St
Suburb	Kilbirnie
City	Wellington
State	
Postal Code	

To generate a CSV file:

An Excel CSV file containing related company and contact information for each record selected can be generated by clicking on the CSV button. Click Save and choose a location where you'd like this file to be stored.

Search

Transactions

The Transaction Search can help you find previously processed transactions. It allows the user to see transaction notes, details and can be used to reverse transactions.

To view the Transactions search page:

1. To access the Transactions Search feature click on Search in the Main menu and select the Transactions link. This will load the Transaction Search page shown below.

You are here : Transactions >> Search Member Transactions

 [Click here for help](#)

Credit To (choose one option from three below):

Select member from the list

Member trading name

Credit Account number

Debit To (choose one option from three below):

Select member from list

Member trading name

Debit Account number

Transaction Type:

Minimum Amount:

Maximum Amount:

From:

To:

Search

Transactions continued

Viewing all transactions:

Select 'All' as the Credit To member and 'All' as the Debit From member and press 'Show Results'.

Using the Transaction Search feature:

By changing the Debit To and Credit To dropdown lists to specific companies we can examine their transaction history

The screenshot shows a search interface with two main sections: 'Credit To' and 'Debit To'. Each section has a title '(choose one option from three below):' and three radio button options. In the 'Credit To' section, the first option 'Select member from the list' is selected, and the dropdown menu shows 'Ozone Barter - Tim Gordon'. In the 'Debit To' section, the first option 'Select member from list' is also selected, and the dropdown menu shows 'Ozone Barter - Samantha Lee'. Both sections have input fields for 'Member trading name' and 'Debit Account number' (or 'Credit Account number' in the Credit To section), each with a 'Search' button next to it.

If you select 'All' for the Debit From member, and a company name for Credit To, we can see all the transactions where this company has received credit from others

Or, you could do the reverse and select 'All' for the Credit To member and a company name for the Debit From member. From this we can see where a company has debited another account.

Limiting by transaction type:

By defining a transaction type from the dropdown box you can limit your search results to the type of transaction. Selecting 'All' will show you all transaction types, you can limit by: POS Terminal, Online Debit Card, Online Bill Pay and by Cheque.

The screenshot shows a dropdown menu labeled 'Transaction Type:' with the word 'All' selected in the dropdown box.

Search

Transactions continued

Limiting by amount:

By entering a Minimum Amount and/or a Maximum Amount you can limit your search to transactions above, below or in the range of certain amounts.

Minimum Amount:	<input type="text"/>
Maximum Amount:	<input type="text"/>

Limiting by date range:

By entering a 'From' date and/or a 'To' date you can limit your search to transactions from, to or in the range of certain dates.

From	<input type="text"/>	Select Date	
To	<input type="text"/>	Select Date	Reset Dates
Show Results			

Search

Plastic Transaction Cards

The POS Card page is used to manage and maintain Plastic Transaction Cards. From here you can change card details or issue a new card to a member.

You can also display a list of all members and their POS card information. You can also search for cards by their card numbers or alternatively display a list of cards based on a date range.

To view the Plastic Transaction Cards search page:

1. To access the Plastic Transaction Cards page click Search in the Main Menu and select the Plastic Transaction Cards link. This will load the Plastic Transaction Cards page shown below.

The screenshot shows the search interface for Plastic Transaction Cards. At the top, it indicates the current location: "You are here : Reports >> EFTPOS Cards". There is a link for "Add New EFTPOS Card". The interface is divided into three main search sections:

- Search By Members:** Includes a "Member (s):" dropdown menu set to "All", a "Sort By:" dropdown menu set to "Business Name", and buttons for "Show Results", "Download CSV", and "Download XLS".
- Search for Specific Card Number:** Includes a "Card Number:" text input field and a "Show Results" button.
- Search By Date Range:** Includes "From:" and "To:" text input fields, each with a "Select Date" button, and buttons for "Show Results", "DownloadCSV", and "DownloadXLS".

To search by Member:

A member's account could have many staff members. It is possible to have more than one POS card registered for the same account so cards to be distributed to different staff members.

1. Select a Member from the 'Search by Member' drop down box. Selecting 'All' will display a list of all Plastic Transaction Cards.
2. Select a 'Sort by' option.
3. Click the 'Show Results' button or Download CSV/XLS to download an editable file

Search

Plastic Transaction Cards continued

Searching by specific card number:

1. Enter all or part of a card number to display cards with the closest match.
2. Click the 'Show Results' button.

Search for Specific Card Number:

Card Number: [Show Results](#)

To search by date range:

1. Select a 'From' date.
2. Select a 'To' date.
3. Click the 'Show Results' button or Download CSV/XLS to download an editable file

Search By Date Range:

From: [Select Date](#)
 To: [Select Date](#)
[Show Results](#)
[DownloadCSV](#)
[DownloadXLS](#)

To change POS Card information:

1. After searching for desired members select the 'Change' link next to the card you would like to change.

Business Name	Card Holder	Card Number	Date Requested	CardStatus	Change Status
"Dit... Bank	Jannine ...	221617 ... 01	17/ /2006	Valid	Change
"Dit... Bank	Neil ...	221617 ... 02	24/ /2006	Valid	Change
"Dit... Bank	Jannine ...	221617 ... 52	20/ /2006	Valid	Change
"Dit... Bank	Neil ...	221617 ... 58	20/ /2006	Valid	Change
"Mit...	Mita ...	221617 ... 01	29/ /2005	Requested	Change

Search

Plastic Transaction Cards continued

2. After selecting the 'Change' link the Edit POS Card page will be displayed.

[Back To All EFTPOS Cards](#)

Edit EFTPOS Card

Business Name: [Redacted]
Card Holder: Jannine [Redacted]
Date Requested: 17/06/2006
Requested By: Neil [Redacted]

Card Number: (16 digits)

Expiry Date:

PIN Number: (4 digits number only)

(send via email)

Date Issued: 30/06/2006
Issued By: Jack
Date Disabled:
Disabled By:

Status: Requested Valid Disabled

3. This is a detailed record for a specific POS Card. From here you can change the expiry date, change the PIN number (and email the new one directly to the customer's email address), as well as changing the status between Requested, Valid or Disabled.

Add a new POS Card:

The Plastic Transaction Cards page can also be used to add a new POS Card; however this will be covered later in the manual. See Member → New Plastic Transaction Card on page 67.

CHAPTER FOUR

Member

When a company wishes to become a member, information about them must be stored in the system.

This section of the application relates to managing member details such as contact information and financial position.

Processing automatic payments such as monthly or annual registration fees, and dealing with commission payments.

It also includes managing member's Cheque books and outlines the member registration process.

Contents

Cheque Books	35
CRM.....	38
Members	43
Member Details.....	45
Payments.....	54
Rating & Trade Status.....	63
New Plastic Transaction Card.....	67
Saved Searches	68

Member

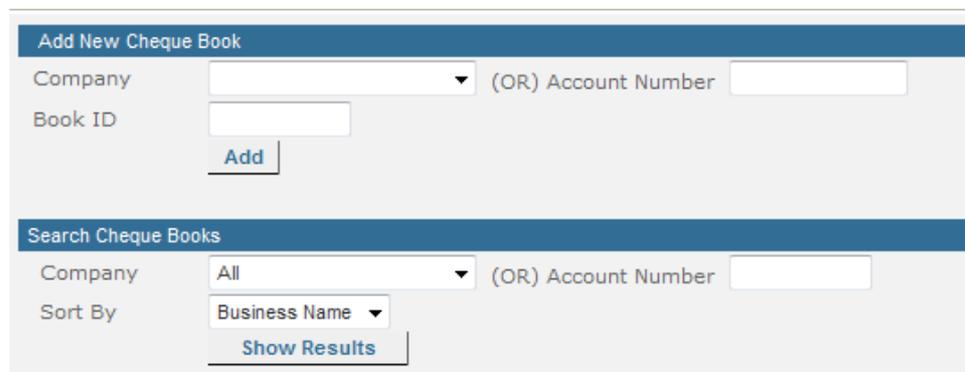
Cheque Books

The Cheque Books page is used to manage and maintain Cheque Books issued to members. From here you can change book details or issue a new Cheque Book to a member.

You can also display a list of all members and their Cheque Book information. You can also search for cards by their card numbers or alternatively display a list of cards based on the date issued.

To view the Cheque Books page:

1. To access the Cheque Books page click Member in the Main Menu and select the Cheque Books link. This will load the Cheque Books page shown below.



The screenshot displays two sections of the Cheque Books management interface. The top section, titled 'Add New Cheque Book', features a 'Company' dropdown menu, an '(OR) Account Number' text input field, a 'Book ID' text input field, and an 'Add' button. The bottom section, titled 'Search Cheque Books', includes a 'Company' dropdown menu set to 'All', an '(OR) Account Number' text input field, a 'Sort By' dropdown menu set to 'Business Name', and a 'Show Results' button.

To search for Cheque Books:

1. Under 'Search Cheque Books' select the company whose cheque book details you would like to view. A record showing the Book ID, Issue Date, and Status of this company's cheque book will show up in the results.
2. Alternatively you can select all under the company dropdown list. This will return a list of cheque book details for all companies that have a cheque book.
3. An example of this is shown below. The selection can be sorted according to Business Name, Status, Issue Date or Book ID.

Member

Cheque Books continued

Business Name	Account	Book ID	Issue Date	Status	Change Status
A.B	Valid	56	30/ /2004	Enabled	Change
A.A	Valid	57	30/ /2004	Enabled	Change
A.C	Valid	55	9/ /2004	Enabled	Change
Abb	Valid	56	30/ /2004	Enabled	Change

Edit Cheque Book details:

1. After searching for desired members select the 'Change' link next to the card you would like to change. This will load the Edit Cheque Book page shown below.

Edit Existing Cheque Book

Issued to: A [Valid] ▼

Book ID: 56

Status: Enabled Disabled

Cancel
Confirm

2. To remove a Cheque Book from circulation, change the desired book to 'Disabled' and press 'Confirm'.
3. To reassign a Cheque Book to another member, select the member name from the dropdown list and press 'Confirm'

Add a new Cheque Book:

1. Under 'New Cheque Book' select the company that the new Cheque Book will be assigned to.

Add New Cheque Book

Company: ▼ (OR) Account Number:

Book ID:

Add

Member

Cheque Books continued

2. Enter a unique Cheque Book ID and press the 'Add' button.



NOTE: This number can not be the same as any other Cheque Book ID in the system

3. If the process is successful, you will be notified with 'Insert Succeeded', if there is an error the insert will be declined.
-

Member

CRM

CRM or Customer Relations Management is an important part of the software allowing exchange staff to track interaction with exchange members. From the CRM page, staff can have fast access to important information.

You are here : Member >> CRM

Pending Accounts: 1 [\[Validate\]](#) [Search all members](#)
 Pending Listings: 2 [\[Validate\]](#)
 Pending Products: 1 [\[Validate\]](#)
 Pending Services: 2 [\[Validate\]](#)

Disputed Transactions: 1 [\[View\]](#)
 Pending Pay Anyone Transactions: 2 [\[View\]](#)
 There are 1 pending and 0 sent but not validated orders: [\[View\]](#)

Scheduled Broadcasts
 Newsletters: 1 Date: 7/30/2007 2:00 PM [\[Edit\]](#)
 SMS Messages: 0 Date: N/A [\[Edit\]](#)

In Progress and Open events for Miriam Worsnop: [\[Show all\]](#) [\[Search events\]](#)

Status	Company	Event	Due	Priority	Edit
Open	ArtShop	She must pay her overdraft	6/13/2007 11:09 PM	Medium	Edit

< >

[\[Add new event\]](#)

Search all members:

This is a quick link to Members Search. See Search → Members on page 22.

Pending Accounts:

Pending accounts shows the user the number of new members who have joined and are awaiting account approval and activation.

Pending Listings:

Pending Listings shows the number of directory listings that are waiting to be approved by the exchange. See Item → Listing on page 185 for instructions on approving listings.

Pending Products:

Pending Products shows the number of Products that are waiting to be approved by the exchange. See Item → Listing on page 185 for instructions on approving listings.

Pending Services:

Pending Services shows the number of Services that are waiting to be approved by the exchange. See Item → Listing on page 185 for instructions on approving listings.

Member

CRM continued



NOTE: Pending Listings, Products and Services are only shown if you have enabled Item Approval. See Exchange → Feature Settings on page 94 for more information.

Disputed Transactions:

The number of transactions that have been reported to the exchange for investigation. See Transactions → Disputed Transactions on page 83.

Pending Pay Anyone transactions:

The number of Pay Anyone transactions that are pending. From here exchange staff can approve, decline or edit Pay Anyone transactions. See Pay Anyone → View on page 88.

Pending and Validated Orders:

The number of pending and un-validated orders. See Reports → Pending Orders Report on page

Scheduled Broadcasts:

This section shows current Newsletters and SMS messages that are scheduled to be sent. To edit the current schedules, press 'Edit'. See Communication → Newsletter on page 131 and Communication → SMS on page 134 for further information on these features.

Events:

This section details current events and notes. From here staff can add, edit, delete, and search events.

In Progress and Open events for Tim :

[\[Show all\]](#) [\[Search events\]](#)

Status	Company	Event	Due	Priority	Edit
Open		Customer expects call at midday.	2007-01-15 14:30	Medium	Edit

< >

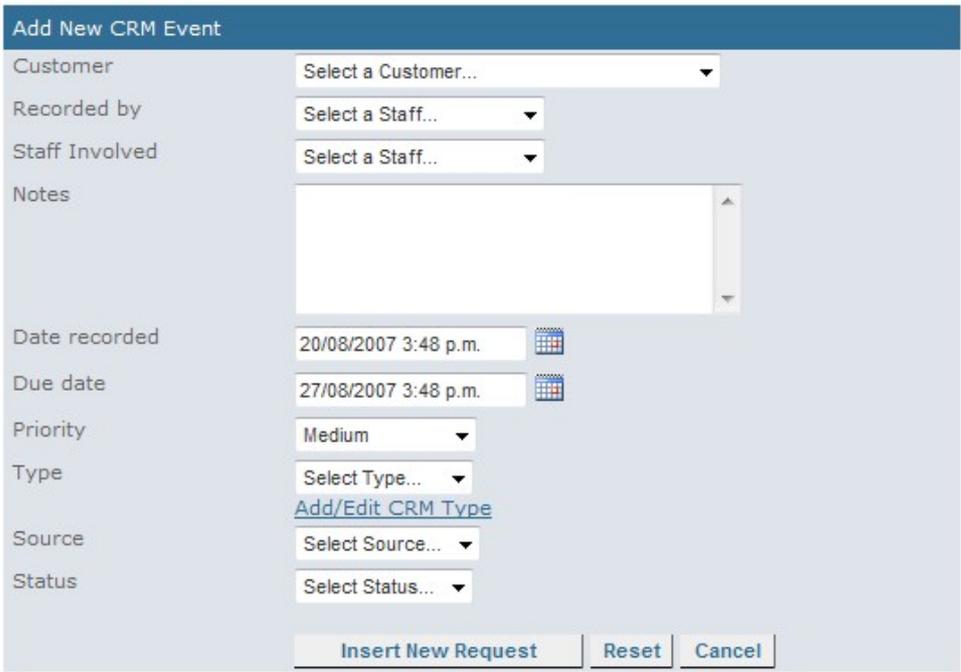
[\[Add new event\]](#)

Member

CRM continued

Adding CRM Events:

1. To add a new CRM Event, click on the [Add new event] link. This will load the Add New CRM Event page shown below.



The screenshot shows a web form titled "Add New CRM Event". The form contains several fields and buttons:

- Customer:** A dropdown menu with the text "Select a Customer..." and a downward arrow.
- Recorded by:** A dropdown menu with the text "Select a Staff..." and a downward arrow.
- Staff Involved:** A dropdown menu with the text "Select a Staff..." and a downward arrow.
- Notes:** A large, empty text area with a vertical scrollbar on the right side.
- Date recorded:** A text input field containing "20/08/2007 3:48 p.m." and a small calendar icon to its right.
- Due date:** A text input field containing "27/08/2007 3:48 p.m." and a small calendar icon to its right.
- Priority:** A dropdown menu with "Medium" selected and a downward arrow.
- Type:** A dropdown menu with "Select Type..." and a downward arrow. Below it is a blue hyperlink labeled "Add/Edit CRM Type".
- Source:** A dropdown menu with "Select Source..." and a downward arrow.
- Status:** A dropdown menu with "Select Status..." and a downward arrow.

At the bottom of the form, there are three buttons: "Insert New Request" (highlighted in blue), "Reset", and "Cancel".

2. Start by selecting the name of the member you would like to assign the note to from the 'Customer' dropdown box.
3. Select both the name of the person entering the new event and staff involved from the 'Recorded by' and 'Staff Involved' dropdown boxes.
4. Enter the note into the notes box.
5. Select both the recorded and due date by clicking the calendar icon.

Member

CRM continued

6. Select the priority of the message. (High, Medium, Low).
7. Select the type of event. Additional event types can be added by the user. See Adding Event Types below.
8. Select the source of the event; this is usually the form of contact that was initially made with/by the member.
9. Finally, select the status of the event. (Open, In Progress, Pending, Closed).
10. Press 'Insert New Request' to add the new event.

Editing a CRM Event:

In Progress and Open events for Tirm : [\[Show all\]](#) [\[Search events\]](#)

Status	Company	Event	Due	Priority	Edit
Open		Customer expects call at midday.	2007-01-15 14:30	Medium	Edit

< >

[\[Add new event\]](#)

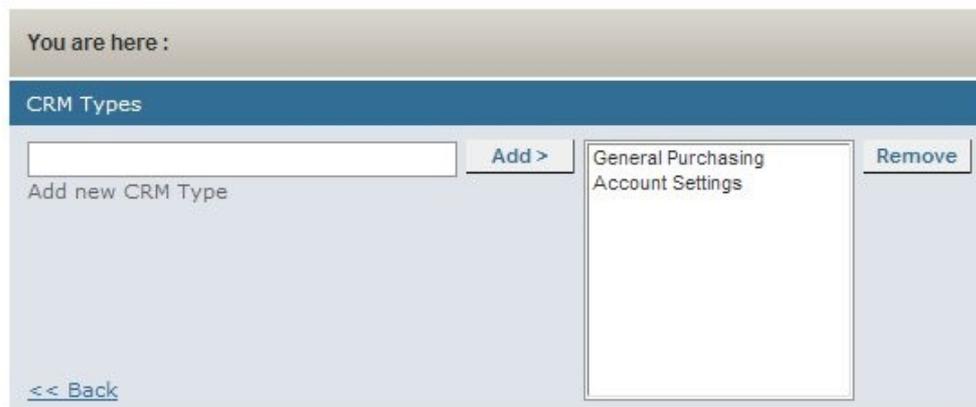
1. Select 'Edit' next to the event you would like to edit on the CRM page.

Member

CRM continued

Adding a new CRM Event Type:

1. To add a new CRM Event Type, click on the [Add new event] link. This will load the Add New CRM Event page, under 'Type' click Add/Edit CRM Type. This will display the page shown below.



The screenshot shows a web interface for managing CRM Types. At the top, a breadcrumb trail reads "You are here : CRM Types". Below this is a header bar labeled "CRM Types". The main area contains a text input field with the placeholder "Add new CRM Type" and an "Add >" button to its right. To the right of the input field is a list box containing two items: "General Purchasing" and "Account Settings". A "Remove" button is positioned to the right of the list box. At the bottom left of the interface, there is a "<< Back" link.

2. In the 'Add new CRM Type' box, enter the name of the type you would like to use and press 'Add'.
3. To remove a type, select the type in the right-hand list and press remove.
4. To finalize changes click 'Back' to take you to the Add CRM Event page.

Member

Members

The Members page allows you to quickly find a members account information by filtering a list of all members in your exchange.

To view the Members page:

1. To access the Members page click on Member in the Main Menu and select the Members link. This will load the Members page shown below.

Search by Business Name: [Search Tips](#)

Category:

- All
- Accountants & Auditors
- Adult Education
- Adult Entertainment

Display: Account No. Ref No.

Sort by:

Account #	Business Name	Permission	Cash Balance	Barter Balance	Overdraft Limit
01001	Monsta Investments Ltd	Valid	\$0.00	\$0.00	\$10000.00
01002	All Window Cleaning Services Ltd	Valid	\$0.00	\$0.00	\$5000.00
01003	Keweenaw Ltd	Valid	\$0.00	\$0.00	\$10000.00
01004	Delux Furniture Ltd	Valid	\$0.00	\$0.00	\$5000.00
01005	Dexter Tech Systems Ltd	Valid	\$0.00	\$0.00	\$3000.00
01006	Accounting & Business Services Ltd	Valid	\$0.00	\$0.00	\$10000.00
01007	Network & Technology Limited	Valid	-\$96.30	\$1875.21	\$2000.00

Filtering member information:

1. If you know the name of the business you are looking for then enter this into the search box. This box supports wildcard search.
2. Select a category from the list if require and how you would like to sort the results. Sort by: Account Number, Reference, Business Name, Permission, Cash Balance, Barter Balance, and Overdraft Limit.
3. Choose whether you want to display the Account Number or Reference and click on the 'Show Results' button.

Member

Members continued

To view specific member information:

1. Click on the Business name of the member you would like to see details for.
 2. You will be taken to the 'Member Details' page for that member. See Member → Member Details on page 45.
-

Member

Member Details

The Member Details section contains all information relating to a particular member. It includes Access, Ratings, Cards, Telephone Banking, Quick Tasks, Documents, Account, Contact, Online Details and Notes.

Each of these will be covered in more detail as we go through this section. Initially when accessing the Account Details, all information is locked in view mode. Clicking the spanner icon on the right hand side of the page unlocks the page and allows users to add, update or delete member information.

Different functions are shown by these icons. These can be found at the top right of the merchants panel.



When the Member Details page first loads, we can see the Member Details link bar. These links are the different sections of the Member Details page.

Company: Teemana Shree [Valid] [Back to Merchants](#)

[Access](#) | [Ratings](#) | [Cards](#) | [Telephone Banking](#) | [Quick Tasks](#) | [Documents](#) | [Account](#) | [Contact](#) | [Online Details](#) | [Notes](#)

Merchant Details	
Registration Date	22/02/2017 10:00:00 AM
Ref Number	7232
Account Number	01000
Trading Name	Teemana Shree
Legal Name	Harish Moh and Rishabh Ltd
Member Type	Not Defined Add/Edit Member Type
Cash Balance	₹0.00
OzoneCARD Balance	₹0.00
Credit Limited	₹10000.00
Maximum Credit Balance	Unlimited

Member

Member Details continued

Access:

The Access section controls the different account privileges the member has for each staff account under the member. Clicking on the edit icon allows you to change the permissions for each account login.

Merchant Access Details for [Member Name]	
Able to buy	Yes
Able to sell	Yes
Able to perform saved search	Yes
Able to add/manage sub accounts/users	Yes
Able to add/manage branches	Yes
Able to subscribe to the newsletter	Yes
Able to modify/control their individual time settings	Yes
Able to edit their date of birth after specifying it once already	Yes
Able to control maximum credit balance	No

Rating:

The Rating section shows other members who have rated the selected account and what rating they gave them. The exchange can also edit and delete ratings.

Ratings				
Current Rating: (10/10)				
The following merchants have rated this business:				
Member	Date	Rating	Edit	Delete
Network 5 Technologies Limited Most Excellent Trade	7/05/2007	10	Edit	Delete
< >				

Editing/Deleting a Rating:

To edit a rating press the 'Edit' link. This allows you to modify the comment that was made with the rating. Press 'Update' to enter, or 'Cancel' to go back. To delete the rating all together, press 'Delete'.

Ratings				
Current Rating: (10/10)				
The following merchants have rated this business:				
Member	Date	Rating	Edit	Delete
Network 5 Technologies Limited Most Excellent Trade	7/05/2007	10	Update Cancel	Delete
< >				

Member

Member Details continued

Cards:

The Cards section lists all plastic transaction cards that are currently issued against the member account. More information on requesting a new card and editing current card information can be found at Member → New Plastic Transaction Card on page 67.

Plastic Cards			
1 Plastic Cards Issued			Request New Card
Name	Card	Expiry	Edit
Peter Parashis	221617 (827011-4400)	12/2010	Edit
< >			

Telephone Banking:

The Telephone Banking section lists all telephone banking logins that the member has listed under their account. Clicking on the edit button allows you to disable the login and change their PIN number.

Telephone Banking	
Customer Number	87570504
PIN Number	8756
Time of Last Call	N/A
Date Registered	8/01/2007 4:12 p.m.
Enabled	Yes

Quick Tasks:

The Quick Tasks tab gives you access to common tasks such as:

- Send Welcome Email and Password reminder.
- Statements: Gives you quick access to account balances and allows the user to quickly generate a statement.
- Member Fee Details: If you have chosen to charge new members a membership fee, clicking on Pay Now will record the payment in the system.

Member

Member Details continued

Quick Tasks

Send All a **Welcome Email** Send Welcome Email

Send this user a **Password Reminder** Send Password Reminder

De-List all directory listings for this user De List

Re-List all directory listings for this user Re List

Statement

Cash Balance \$0.00

OzoneCARD Balance \$999.99

From

To

View

Merchant Fee Details

Merchant Cash Fee	Not paid
	Free Application
	Payment Method: BBX
Merchant OzoneCARD Fee	No Barter Fee

AutoPay Details

No autopay entry available.

Documents:

The Documents page allows you to upload Membership Agreements, Identification and Personal Guarantee documents.

Company Specific Membership Files				
Type	Status	Date uploaded	Version	
Card signatures	N/A		0.0	Upload/view
Company brochure	N/A		0.0	Upload/view
Guarantee	N/A		0.0	Upload/view
Identification	N/A		0.0	Upload/view
Member agreement	N/A		0.0	Upload/view
Other	N/A		0.0	Upload/view

Member

Member Details continued

Viewing/Uploading a document:

1. To upload or view documents press the 'Upload/view' link next to the document you require.
2. You will be shown the page below. Start by setting the documents default status either: Approved, Needs Approved or Not Approved.
3. Click on Browse to locate the document you would like to upload. This can be in .jpg .gif .png .bmp .tif or PDF format.
4. Add any comments you would like to add to the document.
5. Press 'Submit' to upload the document. To go back without uploading.
6. To view a document, press 'View file' next to the file you would like to view under 'previous versions'

Upload new file

Note: File types supported are jpg, gif, jpeg, png, bmp, tiff, pdf.

Company XO Limited

File Type Card signatures

Status

Upload C:\Users\User\Documents\Fax Barte

Comments

Version 0.2

Previous versions

Status	Date uploaded	Version	
Approved	22/08/2007 11:03:00 a.m.	0.1	View file

Member

Members continued

Accounts:

The Accounts tab is where important member information such as their addresses, account balances and advanced options.

To change any of the details click on the spanner icon on the left. This will allow you to edit the details. When you have finished making the changes, click the 'accept' icon to save your changes.

Merchant Details 	
Registration Date	23/01/2007 12:33:17 p.m.
Ref Number	5442
Account Number	01
Trading Name	
Legal Name	
Member Type	Not Defined Add/Edit Member Type
Cash Balance	\$0.00
OzoneCARD Balance	
Credit Limited	\$20000.00
Pricing Plan	Fee Exempt
Permission	Valid
Merchant Advisor	
Merchant Advisor Assignment Date	N/A
Broker	Not Assigned
Broker Assignment Date	N/A
Assoc Broker	Not Assigned
Assoc Broker Assignment Date	N/A
Type of Business	Limited Liability
Merchant Status	Customers Needed
If Registered Company,	
Company Reg. #	n/a
GST/VAT Number	n/a
Year Started Trading	0
Estimated Annual Turnover	Less Than \$100K
Number of Staff	Less than 50
Referral	I wrote it in!!



IMPORTANT: You must click on the 'tick' icon if you wish to have your changes saved.

If you want to cancel any changes and return the information to its original state, press the 'cancel' arrow.

If there is a member that has been accidentally setup or you would like to remove, there is the 'delete' option. This can only be used if the member has not begun trading with any other members.

Member

Members continued

Contact:

The Contact tab contains member contact information such as their contact phone numbers, email addresses and postal addresses.

Merchant Contact Information 	
Phone	099156873
Toll Free Phone	0800000000
Fax	093457843
Toll Free Fax	
Mobile Phone	0218909876
After Hours / Emergency	
Business Main Email	warehouse@barter-software.com
Web Site Address	www.barter-software.com
Physical Address:	
	15 Karaka St
	Newton
	Auckland
	New Zealand
Postal Address:	
	PO Box 8663
	Symonds St
	Auckland
	New Zealand
	1010

To change any of the details click on the spanner icon on the left. This will allow you to edit the details. When you have finished making the changes, click the 'accept' icon to save your changes.

Member

Members continued

Online Details:

The Online Details section lists all the front end login, directory listing and products and services information that is under the company.

Merchant Online Details (Main User)		
Name	Tazmania Blinds	
Birthday	1/01/1900	
Username	admin	
Password	admin	
FrontEnd Access	Yes	
Title	Owner / Partner	
Email	tasmania.blinds@gmail.com	
Status	Valid	
Permission to check company Account	Yes	
Language	Default	
Update Directory Listing Details		
Trading Name	Tazmania Blinds	
Status	Active Deactivate	
Contact Name	Tazmania Blinds PO Box 1000 New Zealand	
Listing Address	2013 New Zealand	
Contact Phone	000000000	
Contact Fax		
Update Address to	Postal Physical	
Business Directory Listings	Suppliers of Blinds: 25mm Aluminium Venetians, 50mm Aluminium Venetians, Roller Blinds, Vertical Blinds, Timber Blinds, Ready Made. Venetians, Rollers and Vertical Blinds Repairs. Contact us today and we will come to you. All orders are welcome.	
Products and Services		
Products from this Company		
This company has 4 Products in their selling Basket		
Product	Category	Date Added
21" diqitor tv	Televisions	5/08/2007
Aluminium Venetian Blind	Blinds / Drapes	5/08/2007
Aluminium Venetian Blinds	Home Fittings	23/06/2007
Timber Venetian Blinds	Home Fittings	23/06/2007

To change any of the details click on the spanner icon on the left. This will allow you to edit the details. When you have finished making the changes, click the 'accept' icon to save your changes.

To quickly login to the front end as a specific member, click on the sign in button on the title bar.

Member

Members continued

Notes:

The Notes section provides quick access to the CRM feature and allows you to create events for that member.

For further information see Member → CRM on page 38.

Member

Payments

The Payments page is used to view and make member cash payments as well as setup of automatic payments and credit card processing.

Payments	
<ul style="list-style-type: none"> View Cash Receipts View Auto Payments Process Auto Payments 	<ul style="list-style-type: none"> Add New Cash Receipts Add New Auto Payments Upload New Cash Receipts

View Cash Receipts:

- To View Cash Receipts click on Member in the Main Menu and select the Payments link. This will load the Payments page shown above. Click on View Cash Receipts to load the page. This is shown below.

View Cash Receipts						
Company	All	(OR) Account Number				
From	15/08/2005					
To	22/08/2007					
GL Code	< ALL >					
View						
Business Name	Method	Amount	Processed on	GL Code	Notes	Details
A1 Window Cleaning Specialist Services	Cash	-\$60.00	5/04/2007	n/a	Reverse payments	Details
	Cheque	\$120.00	5/04/2007	n/a		Details
	Cash	-\$30.00	18/05/2007	n/a		Details

This View Cash Receipts page allows you to search and view member commission payments. It provides a complete record of all commission payments a company has made since it joined the exchange.

Member

Payments continued

To view all cash payments:

1. Select 'All' from the Company dropdown list.
2. Select a date range.
3. Press the 'View' button.

To view specific company cash payments:

1. Choose the name of the company you would like to view cash payments for from the Company dropdown box or enter their account number.
2. Select a date range
3. Press the 'View' button.

To view payment details:

1. Click on the 'Details' link next to the payment you require.
2. The payment details are displayed

Cash Receipt Details	
Company	A1 Window Cleaning & Maintenance Services
Payment Type	Cash
Amount	-\$60.00
Date Processed	5/04/2007
Notes	Reverse payments to get account trading

Member

Payments continued

View Auto Payments:

- To view the Auto Payments page click on Member in the Main Menu and select the Payments link. This will load the Payments page shown above. Click on View Auto Payments to load the page. This is shown below.

View Auto Payments			
Display	All		
Account	Business Name	Auto Payment Method	Details
01075	Bexqlen NZ Ltd	Credit Card (Approved)	Details
01022	National Property Services Ltd	Credit Card (Approved)	Details
01030	Pacific Energy Services Ltd	Credit Card (Approved)	Details
Page 1			

Search for Auto Payments:

The search allows listing of all Approved members and all members Waiting for Approval. These categories are further broken up into Direct Debit and Credit Card payments. The list of members is updated relative to your selection

Once you've found the appropriate member, you can click on the Details link on the right hand side of the record. This will take you to the details for that automatic payment.

The example below shows the Automatic Payment Details page for an approved credit card.

Auto Payment Type	Credit Card
Status	Approved
	Delete
Name On Card	N
Card Type	Visa
Card Number	499913
Expiry Time	/2007
Security Number	0

Member

Payments continued

This example shows the details of an approved direct debit payment. These details are able to be edited by clicking the 'Edit' button.

<input type="text" value="XXXXXXXXXXXX"/>	
Auto Payment Type	Direct Debit
Status	Approved
	Delete
Edit	
Authorised By	Christine
Form Received On	2006/01/16
Bank Account #	02
Bank	01
Branch	0210
Address	ANZ
Expiry Date	2010
Signed By	Christine
Name	Christine

Add New Cash Receipts:

1. To view the New Cash Receipts page click on Member in the Main Menu and select the Payments link. This will load the Payments page shown above. Click on New Cash Receipts to load the page.

Entering a new Cash Payment:

1. Select the company that the cash payment had been made from.
2. Choose cash from the Payment Method drop down box.
3. Enter the amount that is to be paid.



NOTE: If you want to refund money to a member, enter the amount as a negative value -\$15.00. This will be entered into the system as an account credit.

Add New Payment	
Company	<input type="text"/> (OR) Account Number <input type="text"/>
Payment Method	Cash
Amount	<input type="text"/> (Process: Positive, Reverse: Negative)
Transaction Date	22/08/2007
Notes	<input type="text"/>
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

Member

Payments continued

4. Select a processing date by pressing the calendar icon button and choosing a date from the calendar.
5. Fill in the details.
6. If desired add notes to the transaction.
7. Press 'Confirm' to process this payment.

Entering a new Cheque Payment:

1. Select the company that the cash payment had been made from.
2. Choose cheque from the Payment Method drop down box.
3. Enter the amount that is to be paid.

The screenshot shows a web form titled "Add New Payment". It has several sections:

- Company:** A dropdown menu and a text input field labeled "(OR) Account Number".
- Payment Method:** A dropdown menu currently set to "Cheque".
- Amount:** A text input field with a note below it: "(Process: Positive, Reverse: Negative)".
- Transaction Date:** A text input field containing "22/08/2007" and a calendar icon button.
- Cheque Details:** A section with four text input fields: "Cheque Number", "Drawer", "Bank", and "Branch".
- Notes:** A large text area with a vertical scrollbar.
- Buttons:** "Confirm" and "Cancel" buttons at the bottom.

4. Select a processing date by pressing the calendar icon button and choosing a date from the calendar.
5. Fill in the details that were on the cheque.
6. If desired add notes to the transaction.
7. Press 'Confirm' to process this payment.

Entering a new Credit Card Payment:

1. Select the company that the cash payment had been made from.
 2. Choose cheque from the Payment Method drop down box.
 3. Enter the amount that is to be paid.
-

Member

Payments continued

Add New Payment

Company	<input type="text"/>	(OR) Account Number	<input type="text"/>
Payment Method	Credit Card	Process credit card manually	
Amount	<input type="text"/>		
(Process: Positive, Reverse: Negative)			
Transaction Date	22/08/2007		
Credit Card Details			
Name on Card	<input type="text"/>		
Card Type	AMERICAN EXPRESS		
Card Number	<input type="text"/>		
Expiry	1	2007	
Notes	<input style="height: 40px;" type="text"/>		
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>			

4. Select a processing date by pressing the calendar icon and choosing a date from the calendar.
5. Fill in the credit card details.
6. If desired add notes to the transaction.
7. Press 'Confirm' to process this payment.

 **NOTE:** The information required on this page may be different depending on whether you have decided to collect billing address information with the card. See Exchange → Payment Methods on page 97 for more details.

Entering a new Auto Payment:

1. If the member has a credit card registered for automatic payment then you can use this option to automatically enter their credit card information to make a one off payment.
2. Select 'Auto Payment' from the payment method drop down box and follow the 'Entering a new Credit Card Payment' instructions from step 3.

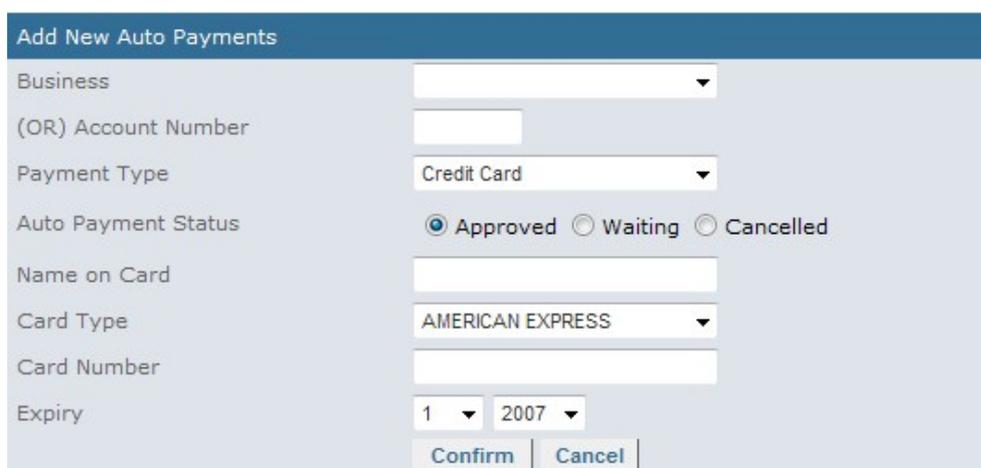
Member

Payments continued

Add New Auto Payment:

1. To view the New Auto Payments page click on Member in the Main Menu and select the Payments link. This will load the Payments page shown above. Click on Add New Auto Payments to load the page. This is shown below.

New Credit Card Auto Payment:



The screenshot shows a web form titled "Add New Auto Payments". It contains the following fields and options:

- Business:** A dropdown menu.
- (OR) Account Number:** A text input field.
- Payment Type:** A dropdown menu currently set to "Credit Card".
- Auto Payment Status:** Three radio button options: "Approved" (selected), "Waiting", and "Cancelled".
- Name on Card:** A text input field.
- Card Type:** A dropdown menu currently set to "AMERICAN EXPRESS".
- Card Number:** A text input field.
- Expiry:** Two dropdown menus for month and year, currently set to "1" and "2007".
- Buttons:** "Confirm" and "Cancel" buttons at the bottom.

1. Select a business from the dropdown list or enter their account number.
2. Fill in all relevant details such as account numbers and expiry date.
3. Click on 'Waiting' or 'Approved' to change the status of the auto payment.
4. Press 'Confirm' to enter the card into the system.

 **NOTE:** The information required on this page may be different depending on whether you have decided to collect billing address information with the card. See Exchange → Payment Methods on page 97 for more details.

New Direct Debit Auto Payment:

1. Select a business from the dropdown list or enter their account number.
 2. Fill in all relevant details such as account numbers and expiry date.
 3. Click on 'Waiting' or 'Approved' to change the status of the auto payment.
 4. Press 'Confirm' to enter the card into the system.
-

Member

Payments continued

Add New Auto Payments

Business	<input type="text"/>
(OR) Account Number	<input type="text"/>
Payment Type	Direct Debit <input type="text"/>
Auto Payment Status	<input checked="" type="radio"/> Approved <input type="radio"/> Waiting <input type="radio"/> Cancelled
Authorised By	<input type="text"/>
Form Received On	<input type="text"/> 
Bank	<input type="text"/>
Branch	<input type="text"/>
Bank Account #	<input type="text"/>
Address	<input type="text"/>
Expiry Date	<input type="text"/> 
Signed By	<input type="text"/>
Name	<input type="text"/>
	<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>



TIP: After entering the information it is a good idea to scan and upload the form to the members detail page as a PDF. See Member → Member Details: Documents on page 48 for more details.

Member

Payments continued

Process Auto Payments:

1. To view Process Auto Payments page click on Member in the Main Menu and select the Payments link. This will load the Payments page shown above. Click on Process Auto Payments to load the page. This is shown below.

This page is used for processing many auto payments at once. This feature will save you a lot of time.

Batch Auto Payments

Create a batch AutoPay Payment

Auto Payment Type: Credit Card

Fees Owing to date: 

Payment Process Date: 

[Select all](#) | [Unselect all](#)

Account Number	Company Name	Process Date	Payment Amount		
01075	Bexqlen NZ Ltd	23/08/2007	\$30.00	Edit	<input checked="" type="checkbox"/>
01022	National Property Services Ltd	23/08/2007	\$0.15	Edit	<input checked="" type="checkbox"/>

1

2. Select the Fees Owing to date.
3. Select the Payment Processing date.
4. Click on 'View'. This will show you all valid automatic payment credit card and direct debit accounts and the amount that is to be paid.
5. If you need to change the amount or the processing date, press 'Edit'
6. To process the payments, press 'Process Selected'.

 **NOTE:** This Processing Auto Payments page only allows you to quickly enter many payments into the system at once. The payment is not processed through the XO system and should only be performed after the funds are showing in your business bank account.

If you are using the PayPal option offered by XO please contact your project manager for more information using this feature.

Member

Rating & Trade Status

The Rating & Trade Status page is used to set the values that define an account as either "Trade Needed" or "Trade Urgently Needed". From here you can also view and manage member ratings.

To view the Rating & Trade Status page:

1. To access the Rating & Trade Status page click on Member in the Main Menu and select the Members link. This will load the Members page shown below.

- Trade Status Setup (Trade Status barter balance limit settings)
- Manage Trade status and Rating
- Delete Rating

Trade Status Setup:

1. To modify trade status options, click on the 'Trade Status Setup' radio button. This will load the Trade Status Setup page shown below.

Note: This function is for setting the upper boundary (Barter balance amount in debit) for Trade needed and Trade urgently needed rating status.

Negative numbers only

Trade needed	<input type="text"/>
Trade urgently needed	<input type="text"/>

[Update](#) [Go Back](#)

2. Enter the upper boundary for both 'Trade Needed' and 'Trade Urgently Needed'. Values must be a negative number.
3. Press 'Update' to save your changes.



EXAMPLE: If you enter -\$1,000.00 for 'Trade Needed', all members with more than \$1,000 dollars in debt will be marked as 'Trade Needed'

Member

Rating & Trade Status continued

To view the Manage Trade Status & Rating page:

1. To access the Manage Trade Status & Rating page click on Member in the Main Menu and select the Members link. This will load the Members page shown below.

- Trade Status Setup (Trade Status barter balance limit settings)
 Manage Trade status and Rating
 Delete Rating

Manage Trade Status & Rating:

1. To modify trade status options, click on the 'Trade Status Setup' radio button. This will load the Trade Status Setup page shown below.

Note: To show all members leave search text field empty

Select member:

Or Search: [Show Results](#) [Go Back](#)

2. Select a member name from the dropdown box or enter their name in the Search box and press 'Show Results'
3. This will display a list of results similar to the list below.

Account #	Ref	Business Name	Trade Status	Barter Balance	Status Expiry Date	Permission	Cash Balance	Overdraft Limit	Rating
003	28		Not Rated Change status	€ 0,00		Valid	€ -40,95	€ 0,00	0,00 Rate

To change a members Trade Status:

1. Click on 'Change Status' next to the name of the member you would like to change the status for. This will load the page below.

Company Name: ***Vision Specialists Optometrists**

Trade Status:

[Update](#)

[Back to Rating & Trade Status](#)

Member

Rating & Trade Status continued

2. Select the status you would like to change the member to (Trade: Unknown, Urgently Needed, Needed or On-hold).
3. Press 'Update' to make the change.

Rating a member:

1. To rate a member and write a short comment about them, select Rate next to the member you would like to rate. This will load the page shown below.



Tim Gordon rating *Vision Specialists Optometrists

Select Value: 0 ▼

Comment:

[Back to Rating & Trade Status](#)

2. Select the rating you would like to give the member. 10 being the highest [Very Happy] to -10 being the worst [Very Angry] from the 'Select Value' dropdown list, also provide a short comment explaining why you gave them the rating.
3. Press 'Rate' to provide your rating.

To view the Delete Rating page:

1. To access the Delete Rating page click on Member in the Main Menu and select the Members link. This will load the Members page shown below.

- Trade Status Setup (Trade Status barter balance limit settings)
- Manage Trade status and Rating
- Delete Rating

Member

Rating & Trade Status continued

Delete Rating:

1. To modify trade status options, click on the 'Delete Rating' radio button. This will load the Delete Rating page shown below.

Go back		Sort by <input type="text" value="Rating"/>		Show Results	
ID	Sender	Comment	Receiver	Rating	Date
1 delete	XO Limited	Excellent trader	Pacific Pine Furniture	10	25-9-2006 0:00:00
2 delete	XO Limited	Excellent trader. Very professional.	Bexglen NZ Ltd	10	25-9-2006 0:00:00
3 delete	XO Limited	Excellent trader. Very professional.	Bexglen NZ Ltd	10	25-9-2006 0:00:00
4 delete	XO Limited	Good trader	IOAF 2	10	25-9-2006 0:00:00

2. Ratings may need to be deleted if the person who placed the rating used obscene language or an incorrect rating was given, due to input error, or because the cause of the bad rating was resolved.

To delete a rating, select the 'Delete' link next to the rating you would like to delete.

Member

New Plastic Transaction Card

The New Plastic Transaction Card page is used to assign a member a new transaction card that they can then use to pay other members using point-of-sale swipe machines or by using the debit a card method.

To view the New Plastic Transaction Card page:

1. To access the New Plastic Transaction Card page click on Member in the Main Menu and select the New Plastic Transaction Card link. This will load the page shown below.



The screenshot shows the top section of the 'New Plastic Transaction Card' page. It features a blue header bar with the title 'New Plastic Transaction Card'. Below the header, there is a form field labeled 'Business Name:' followed by a white input box and a small downward-pointing arrow icon, indicating a dropdown menu.

To create a new card:

1. Select the Business Name of the business you would like to create a new card for from the drop down box. This will load the 'New Card Details' page shown below.



The screenshot shows the 'New Card Details' page. It has a blue header bar with the title 'New Plastic Transaction Card'. The form contains several fields: 'Business Name:' with a dropdown menu, 'Requested By:' with a dropdown menu, 'First Name' and 'Last Name' with text input boxes, 'Card Number' with a radio button for 'Automatic Generation', 'PIN Number' with a text input box, and 'Expiry Date:' with a text input box and a 'Select Date' button. At the bottom of the form, there are two buttons: 'Cancel' and 'Confirm'.

2. Enter a first and last name. This is the name that will appear on the transaction card.
3. Input the desired PIN number and Expiry Date.
4. Press 'Confirm' to enter the changes into the system.



NOTE: See Search → Plastic Transaction Cards on page 31 for details on how to modify card information and changing card status.

Member

Saved Searches

The New Plastic Transaction Card page is used to assign a member a new transaction card that they can then use to pay other members using point-of-sale swipe machines or by using the debit a card method.

To view the New Plastic Transaction Card page:

2. To access the New Plastic Transaction Card page click on Member in the Main Menu and select the New Plastic Transaction Card link. This will load the page shown below.

CHAPTER FIVE

Transactions

Chapter Five details member transactions. The Transactions menu provides access to the functions used to add new transactions and view transaction details.

As an exchange administrator you can view a list of recent transactions as well as search functionality allowing you to find specific transactions.

Disputed Transactions provides control over transactions which a member has deemed to be unsatisfactory.

Contents

Add Batch Adjustment.....	70
Add Transaction.....	73
Recent Transactions.....	81
Online Transactions.....	82
Disputed Transactions.....	83

Transactions

Add Batch Adjustment

This function is used to process batch account adjustments.

Account Adjustments allow to you credit or debit cash or barter amounts to a members account. This can be used for sundry charges such as fee for having a cheque bounce, or giving a member a 10% discount for paying their fees promptly. No commission is charged on these transactions

 **NOTE:** To use this function you must first create Account Adjustment Types. See Pricing → Account Adjustment Type on page 103.

To view the Add Batch Adjustment page:

1. To access the Add Batch Adjustment click Transactions in the main menu and select the Add Batch Adjustment link. This will load the Add Batch Adjustment page shown below.

Purpose : This page is used to make multiple/batch Account Adjustment transactions
An Account Adjustment is required to use this page. It can be created in Pricing >> Account Adjustment Type.

Batch Account Adjustment

Create a batch credit transaction of

Account Adjustment Type : 

To process batch adjustments:

1. To process an adjustment on many accounts, begin by selecting the adjustment type from the drop down list.

Batch Account Adjustment

Create a batch credit transaction of

Account Adjustment Type : 

Fixed OzoneCARD Amount : \$0.00

Fixed Cash Amount : \$12.00

Overdue OzoneCARD Percentage : 0%

Overdue Cash Percentage : 25%

For All Valid Merchants

With

OzoneCARD  Balance in  >

Billed at/Older than 

Due Date 

Transactions

Add Batch Adjustment continued

- Once you have selected the adjustment type you can now select how you would like to get a group of members to apply the adjustment to.

You can search by defining which balance you would like to use, their cash balance, or their barter balance and whether the member is in credit or debit. Enter an amount and select either Billed at/Older than or Due Date.

- Press 'Preview Transaction' to proceed.

Batch Account Adjustment

Create a batch credit transaction of

Account Adjustment Type :

Fixed OzoneCARD Amount : \$0.00

Fixed Cash Amount : \$12.00

Overdue OzoneCARD Percentage : 0%

Overdue Cash Percentage : 25%

For All Valid Merchants

With

OzoneCARD Debt/-

Billed at/Older than

Due Date

Account Number	Company Name	Overdue Billed Balance	Unbilled Balance	Credit OzoneCARD Balance by	Credit Cash Balance By	
01024	B-Creative (NZ) Limited	8450.76	0.00	\$0.00	\$2124.69	<input checked="" type="checkbox"/>
01012	Capital Hobby Limited	695.45	0.00	\$0.00	\$185.86	<input checked="" type="checkbox"/>
01109	Supra Limited	795.76	0.00	\$0.00	\$210.94	<input checked="" type="checkbox"/>
01057	XO Limited	9651.50	0.00	\$0.00	\$2424.88	<input checked="" type="checkbox"/>
01121	xotest2	438.89	0.00	\$0.00	\$121.72	<input checked="" type="checkbox"/>

1

- The results of your filter will then be displayed in a table like the image above. All members displayed will be processed unless the check box at the end of the line is unchecked. Once you have selected the members you would like to apply the adjustment press 'Process Ticked Transactions'. This may take a few moments; a confirmation message will be displayed when complete.

Transactions

Add Batch Adjustment continued

5. If you want to change your member selection simply change the values and/or dates and press 'Preview Transaction'.
 6. The results are also downloadable as an Microsoft Excel spreadsheet that can be merged into a letter.
-

Transactions

Add Transaction

This function is used to process transactions for someone who can't do it themselves. For example, their internet connection is not working or they are away from the office.

This function can be used to process any transaction, not just Cheque. If you are processing a non-Cheque transaction then filling in the Book ID and Cheque number is optional.

Add New Manual Transaction:

1. To access the Add New Cheque Transactions click Transactions in the main menu and select the Add Transaction link. This will load the Add Transaction page shown below.



The screenshot shows a web interface for adding a transaction. At the top, a breadcrumb trail reads "You are here : Transactions >> Add Transaction". Below this is a dropdown menu labeled "Select Transaction Type..." with a downward arrow. The dropdown is open, showing three options: "Select Transaction Type..." (highlighted in blue), "Card Transaction", "Manual Transaction", and "Account Adjustment". To the right of the dropdown is a blue link labeled "View All Transactions".

2. Select Manual Transaction from the dropdown list.



NOTE: This page can be used to reverse incorrect transactions. If you want to reverse a transaction completely (return the total amount of barter dollars as well as reversing the Ozone Fees) then you should use the reverse link under transaction summary.



IMPORTANT: Only use the reverse feature on this page if you would like to do a partial reversal.



EXAMPLE: If a member did a transaction of \$1000 barter dollars to another member's account. Later the two parties renegotiated a 50/50 split between barter dollars and cash. A complete reversal would not be useful in this case so a partial reversal using the following page will have to be done.

Transactions

Add Transaction continued

To Process a Manual Transaction:

1. Enter a Book ID in the text field. This will be a unique number recorded against this transaction for tracking and identification. Remember that a Book ID is optional.
2. Enter a Cheque Number. This is the number that appears on the Cheque. A Cheque number is optional.

New Manual Transaction

Identification

Book ID: (optional)

Cheque Number: (optional)

Buyer

Member: Select From List
 Enter Account Number:

Seller

Exchange:

Member: Select From List
 Enter Account Number:

Amount

OzoneCARD: \$ Force Over Limit Transaction

Cash: \$ Force Over Limit Transaction

Dates

Transaction Date:

Deposit Date:

Details

Transaction Type: Transaction Reverse
Reverse transaction: Original buyer is still the buyer, original seller is still the seller.

Notes:

3. Select a Buyer member account. This is where the money will be taken out of. You will only be able to select members from your own exchange. You can also enter their account number.

Transactions

Add Transaction continued

4. If the member who is receiving the barter dollars is in a different Exchange then click on the dropdown list and select the correct Exchange for that member.



EXAMPLE: If the member who we are debiting is in the New Zealand Exchange, but the member who we are crediting is in Australia, we would use the dropdown list to select Australia. This will populate the Seller dropdown list with members from the Australian exchange.

5. The dropdown list for the Seller member will be automatically updated with members from that exchange.
 6. Select the Member whom you wish to credit either from the drop down box or by entering their account number
 7. Enter the transfer amount in barter dollars. Selecting 'Force Over Limit Transaction' will process a transfer even if the transfer will put the member over their available funds.
 8. Select a Transaction Date by clicking on the relevant Select Date button.
 9. Select a Deposit Date by clicking on the relevant Select Date button. Enter the reason for processing this transaction along with any additional notes relevant to this case under the Notes textbox.
 10. Make sure the Transaction Type is set to 'Transaction'.
 11. Click on the Confirm button to process this transaction.
-

Transactions

Add Transaction continued

To process a Reversal Transaction:

1. Enter a Book ID in the text field. This will be a unique number recorded against this transaction for tracking and identification. Remember that a Book ID is optional.
2. Enter a Cheque Number. This is the number that appears on the Cheque. Remember that a Book ID is optional.

New Manual Transaction	
Identification	
Book ID:	<input type="text"/> (optional)
Cheque Number	<input type="text"/> (optional)
Buyer	
Member:	<input checked="" type="radio"/> Select From List <input type="text"/> ▼ <input type="radio"/> Enter Account Number <input type="text"/>
Seller	
Exchange:	OzoneCard New Zealand ▼
Member:	<input checked="" type="radio"/> Select From List <input type="text"/> ▼ <input type="radio"/> Enter Account Number <input type="text"/>
Amount	
OzoneCARD:	\$ <input type="text"/> <input type="checkbox"/> Force Over Limit Transaction
Cash:	\$ <input type="text"/> <input type="checkbox"/> Force Over Limit Transaction
Dates	
Transaction Date:	17/08/2007
Deposit Date:	17/08/2007
Details	
Transaction Type:	<input checked="" type="radio"/> Transaction <input type="radio"/> Reverse Reverse transaction: Original buyer is still the buyer, original seller is still the seller.
Notes:	<input type="text"/>
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

3. Select Buyer member account.

Transactions

Add Transaction continued

 **IMPORTANT:** This will be the account money will go back into. (This account will not be debited). You will only be able to select members from the exchange you are currently administering.

4. If the member who previously received the barter dollars is in a different Exchange then click on the dropdown list and select the correct Exchange for that member.
5. The dropdown list for the Seller member will be automatically updated with members from that exchange.

 **IMPORTANT:** This account will be debited for the amount we want to put back into the other member's account. Barter dollars will be taken out of this account.

6. Enter the transfer amount in barter dollars.

 **IMPORTANT:** The transaction Date must match the exact date when the transaction occurred. Select a Transaction Date by clicking on the relevant Select Date button.

7. Select a Deposit Date by clicking on the relevant Select Date button.
 8. Make sure the Transaction Type is set to 'Reverse'.
 9. Enter the reason for processing a reversal of this transaction along with any additional notes relevant to this case under the Notes textbox.
 10. Click on the Confirm button to process this transaction.
-

Transactions

Add Transaction continued

To perform a complete reversal of a transaction:

If a member accidentally processes through two identical transactions or if they made a mistake and transferred barter dollars to the wrong account we can use the 'Reverse' link located beside each transaction record. This is an easy and quick way to reverse incorrect member transactions. You can perform a detailed transaction search which is covered under Search → Transactions on page 28.

1. To access the Member Transactions page click Transactions in the main menu and select the Recent Transactions link. This will load the Recent Transactions page shown below.

The 10 most recent transactions.
[Search Transactions](#)

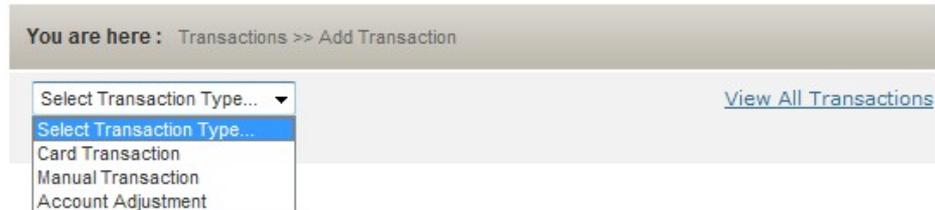
ID	Cheque	Accounts	Amount	Date	More
30443	ID: Admin- Manual Type: Reverse Status:Processed		Cash \$0.00 Barter \$111.00	Transaction:6/ /2007 Deposit: 6/ /2007 Process: 6/ /2007	
30442	ID: Admin- Manual R30441 Type: Reverse Status:Processed		Cash \$0.00 Barter \$111.00	Transaction:6/ /2007 Deposit: 6/ /2007 Process: 6/ /2007	
30441	ID: Admin- Manual Type: Transaction Status:Processed Reverse		Cash \$0.00 Barter \$111.00	Transaction:6/ /2007 Deposit: 6/ /2007 Process: 6/ /2007	
30440	ID: 0-Manual Type: Transaction Status:Processed Reverse		Cash \$0.00 Barter \$0.00	Transaction:6/ /2007 Deposit: 6/ /2007 Process: 6/ /2007	

Transactions

Add Transaction continued

Add New Card Transaction:

1. To access the Add New Card Transactions click Transactions in the main menu and select the Add Transaction link. This will load the Add Transaction page shown below.

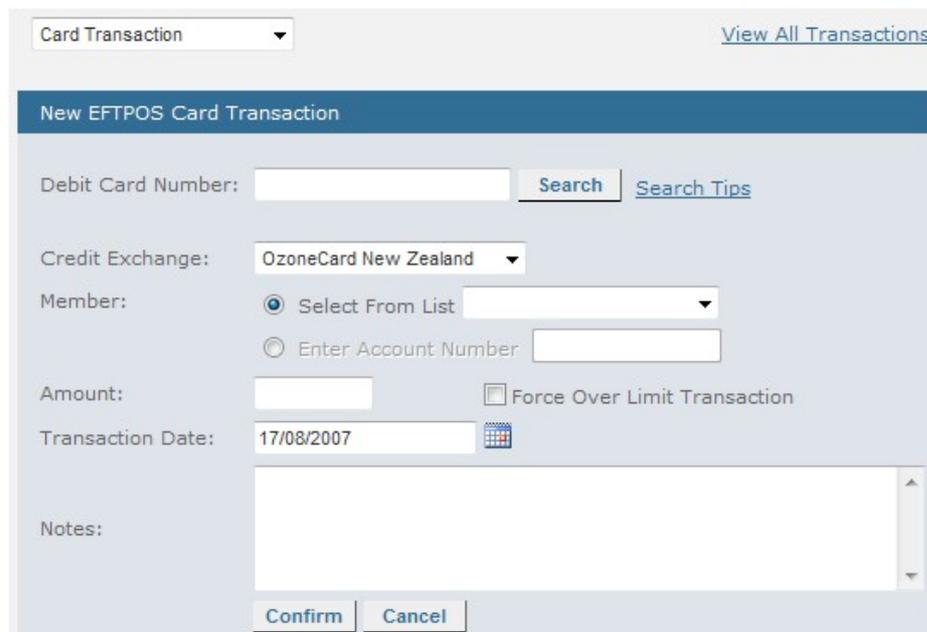


You are here : Transactions >> Add Transaction

Select Transaction Type... [View All Transactions](#)

- Select Transaction Type...
- Card Transaction
- Manual Transaction
- Account Adjustment

2. Select Card Transaction from the dropdown list.



Card Transaction [View All Transactions](#)

New EFTPOS Card Transaction

Debit Card Number: [Search Tips](#)

Credit Exchange: OzoneCard New Zealand

Member: Select From List Enter Account Number

Amount: Force Over Limit Transaction

Transaction Date: 17/08/2007

Notes:

To process a card transaction:

1. Enter the POS card number from which the funds will be debited.
2. If you don't know the exact card details enter a few of the digits and click on the Search button.
3. The page will now show a list of possible Plastic Transaction Cards with matching digits. The following is an example with search input 11.

Transactions

Card Transactions continued

New Transaction				
Debit From	Card No:	<input type="text" value="11"/>	<input type="button" value="Search"/>	Plenty
Business Name	Card Holder	Card Number	CardStatus	Select
Ultracopy Centre Limited	Mario Dometakis	2216171801120001	Valid	Select
Contintental Screens (1988) Limited	Graeme Bellingham	2216171800110001	Valid	Select
Aquarius Data Management	Michael Osborne	2216171801170001	Valid	Select
City Automotive Services Ltd	Greg Mills	2216171801190001	Valid	Select
D & M Traders (2002) Ltd	Des Baldwin	2216171801180001	Valid	Select
Tairoa Lodge	Liz + Alec Brewis	2216171801100001	Valid	Select

4. Click on the Select link next to the desired POS Card. The screen will now return to normal. Note that the card owner's name will now be showing next to the Search button. The name we have selected in the above example is Plenty.
5. Select the Exchange that the 'Credit To' member belongs to.
6. Select the Member from the dropdown list.
7. Enter the amount in barter dollars.
8. Click on the Select Date button and select a transaction date.
9. Enter the reason for processing this transaction along with any additional notes relevant to this case under the Notes textbox.
10. Click on the Confirm button to process this transaction.

Transactions

Recent Transactions

The Recent Transactions page will give you quick access to the ten most recent manually entered transactions that have made.

To view Recent Transactions:

1. To access the Recent Transactions page click Transactions in the main menu and select the Recent Transactions link. This will load the Recent Transactions page shown below.

The 10 most recent transactions.
[Search Transactions](#)

ID	Cheque	Accounts	Amount	Date	More
314	ID: NONE-NONE Type: Transaction Status: Processed Reverse	Credit: NGN Debit: (Company)	Cash \$0.00 Barter \$20.00	Transaction: 2/6/2007 Deposit: 2/6/2007 Process: 2/6/2007	
314	ID: NONE-NONE Type: Transaction Status: Processed Reverse	Credit: Acapulco Motel Debit: Developments Ltd	Cash \$0.00 Barter \$540.00	Transaction: 2/6/2007 Deposit: 2/6/2007 Process: 2/6/2007	
314	ID: NONE-NONE Type: Transaction Status: Processed Reverse	Credit: Limited Debit: Pars TV	Cash \$0.00 Barter \$53.93	Transaction: 2/5/2007 Deposit: 2/5/2007 Process: 2/5/2007	



NOTE: For further information on transactions including detailed search, see Search → Transactions on page 28.

For information on Reversing transactions, see Add Transaction → Reversing Transactions on page 76.

Transactions

Online Transactions

The Online Transactions page displays information regarding online sales and purchases. It shows the flow of money from one account to another, from the purchaser through the Escrow account and to the seller

To view Online Transactions:

1. To access the Online Transactions page click Transactions in the main menu and select the Online Transactions link. This will load the Online Transactions page shown below.

ID	Debited From	Credited To	Cash	Barter	Order	Time	Type
8877	01118 xotest1	Escrow	\$0.00	\$0.00	Product	20/08/2007 1:55 p.m.	Buyer Commission
8876	01118 xotest1	Escrow	\$0.00	\$59.95	Product	20/08/2007 1:55 p.m.	Buyer Item Cost
8864	Escrow	01118 xotest1	\$0.00	\$400.00	Service	15/08/2007 1:45 p.m.	Cancelled
8863	01118 xotest1	Escrow	\$0.00	\$0.00	Service	15/08/2007 1:43 p.m.	Buyer Commission
8862	01118 xotest1	Escrow	\$0.00	\$400.00	Service	15/08/2007 1:43 p.m.	Buyer Item Cost
8723	Escrow	OzoneCard New Zealand	\$0.00	\$0.00	Service	7/08/2007 4:39 p.m.	Seller Commission

You can display results by selecting a 'Credit To' and 'Debit From' account. Using the account 'All' will show you a list of all online transaction details.

Search can also be performed by entering the account number of each party.

Transactions

Disputed Transactions

If a member is unsatisfied with another member while buying or selling online, the member can complain about the transaction and ask that the exchange offer advice in settling the issue.

To view Disputed Transactions:

1. To access the Disputed Transactions page click Transactions in the main menu and select the Disputed Transactions link. This will load the Disputed Transactions page shown below.

Disputed Transactions
These are complained online transactions in your exchange. If you wish to view information on a particular transaction in this list, click on 'Details...'. You can also modify the status of a transaction from there.

[Products](#) | [Services](#) | [All](#)

ID	Product	Buyer	Seller	Type	Status	Date	
1034	Beautiful Artificial Nails	Tim Gordon	Ozone Barter - Tim Gordon Limited	Pick up	Complained	07-02-07 01:29:04	Details...

ID	Service	Buyer	Seller	Status	Date
No complained service					

Completing disputed transactions:

1. If a member disputes a sale or purchase, then these show up under either the Product or Services list. Clicking on the 'Details' link will show you further information about that transaction. A sample is shown below.

Company Name	Status	Note	Date	User Name
Ozone Barter - Tim Gordon	Ordered	Product Ordered.	7-2-2007 13:29:04	Tim Gordon
Ozone Barter - Tim Gordon	Complained		7-2-2007 13:29:39	Tim Gordon

Note

Modify Status of this Order

[Complete](#) [Cancel](#)

Buyer Information
 User Name: [Redacted]
 Full Name: Tim Gordon
 Company: Ozone Barter - Tim Gordon
 Phone: 094459884
 E-mail: tim.gordon@barter-software.com

Seller Details
 Company: XO Limited
 Phone: 2747122
 E-mail: tatiana@barter-software.com

Pricing Information
 Price Per Item: \$10.00
 Quantity: 1
 Shipping: \$0.00

Total Cost: \$10.00
 (excludes commission and shipping)

Transactions

Disputed Transactions continued

2. This page will show you necessary details for resolving the dispute, such as the a note by the person who made the complaint,
3. Once you have revolved the dispute, exchange staff should add a note explaining the actions taken, and press 'Complete'.



IMPORTANT: Funds will be held in escrow account until the transaction disputed has been resolved.

CHAPTER SIX

Pay Anyone

Pay Anyone gives exchange members the ability to pay non-members with their money using email or an SMS enabled mobile telephone.

In this chapter we detail setting pricing plans plus viewing and managing Pay Anyone transactions.

Contents

Set Default Pricing Plan.....	86
View.....	88

Pay Anyone

Set Default Pricing Plan

Setting a default pricing plan defines that fees that exchange members and their Pay Anyone partner will pay.

To view Set Default Pricing Plan:

1. To access the Set Default Pricing Plan page click Pay Anyone in the main menu and select the Set Default Pricing Plan link. This will load the Set Default Pricing Plan page shown below.

To set default pricing plan:

1. To set a default pricing plan, click on 'Make Default' next to the pricing plan you would like to set. To remove a selected pricing plan, click on 'Unselect'

Select Default Pricing Plan for PayAnyone

<input type="button" value="Make Default"/>	ACCOUNTS	Properties...
<input type="button" value="Make Default"/>	SPECIAL EXEMPTION (NO FEES)	Properties...
<input type="button" value="Unselect"/>	DEFAULT OZONE PRICING (Default)	Properties...
<input type="button" value="Make Default"/>	DEFAULT FOUNDATION PLAN	Properties...
<input type="button" value="Make Default"/>	SECONDARY ACCOUNTS	Properties...

To view plan properties:

1. By clicking on the 'Properties' link, you can view the details of the pricing plan. Details include fees incurred.

<input type="button" value="Unselect"/>	DEFAULT OZONE PRICING (Default)		Properties...
	Cash Amount	Barter Amount	Monthly Day/ Annual Date Charged
Registration Fee	€ 500,00	€ 0,00	
Monthly Fee	€ 15,00	€ 0,00	1
Annual Fee	€ 0,00	€ 0,00	
Buy Rate	3%	0%	
Sell Rate	3%	0%	
SMS Banking Charge	€ 0,20	€ 0,00	

Pay Anyone

Set Default Pricing Plan continued

Setting additional Pay Anyone Information:

1. You can also define notification and charge settings from this page. By modifying the values you can define how many days a user has to accept a Pay Anyone transaction and how much it will cost them to submit a payment using Pay Anyone.

Per PayAnyone Transaction Charge / Notification Settings

Barter Amount:	<input type="text" value="5,2310"/>
Cash Amount:	<input type="text" value="5,2520"/>
Automatic Notifications	
1st Notification Sent after:	<input type="text" value="7"/> days
2nd Notification Sent after:	<input type="text" value="14"/> days
3rd Notification Sent after:	<input type="text" value="21"/> days
4th Notification Sent after:	<input type="text" value="28"/> days
Users Able to Cancel after:	<input type="text" value="7"/> days
Auto Cancel after:	<input type="text" value="-2"/> days

2. To change, simply change the number of days to a number that will suit your exchange and press 'Save Changes'.



NOTE: To add or modify Pay Anyone pricing plans, see Pricing → Pricing Plan on page 107.

Pay Anyone

View

From View, exchange staff can see all Pay Anyone transactions that have been made in the system.

To view Pay Anyone View:

1. To access the Pay Anyone View page click Pay Anyone in the main menu and select the Pay Anyone View link. This will load the Pay Anyone View page shown below.

Sender	Sender Company	Recipient	Amount	Expires on	Status	Reverse
Edgar Smallwood	Blue Group Ltd	contact@manulife.gov.ie	583.4400	8/03/2007 3:57:30 p.m.	Reversed	Reverse
Edgar Smallwood	Blue Group Ltd	contact@manulife.gov.ie	385.2400	8/03/2007 4:01:21 p.m.	Reversed	Reverse
Edgar Smallwood	Blue Group Ltd	support@manulife.co.ie	243.5000	8/03/2007 4:12:20 p.m.	Reversed	Reverse
Edgar Smallwood	Blue Group Ltd	customer.service@manulife.co.ie	160.9000	8/03/2007 4:14:36 p.m.	Reversed	Reverse
Joel Porter	Pacific Centre for Motivation and Change, Limited	joelporter@pccm.co.ie	500.0000	11/03/2007 1:13:00 p.m.	Declined	Reverse
Stephen Daniels	Capital Hobby Limited	sdaniels@capitalhobby.co.ie	1226.4600	20/03/2007 1:36:46 p.m.	Reversed	Reverse
Stephen Daniels	Capital Hobby Limited	stephen@capitalhobby.co.ie	2192.5400	20/03/2007 1:44:20 p.m.	Reversed	Reverse
Stephen Daniels	Capital Hobby Limited	carman.carman@capitalhobby.co.ie	1013.6100	20/03/2007 1:47:56 p.m.	Reversed	Reverse
Stephen Daniels	Capital Hobby Limited	credit12@capitalhobby.co.ie	800.9800	20/03/2007 1:50:50 p.m.	Reversed	Reverse
Stephen Daniels	Capital Hobby Limited	credit12@capitalhobby.co.ie	800.9800	20/03/2007 2:00:40 p.m.	Reversed	Reverse
Jason Paladin	National Property Services Ltd	info@nationalps.co.ie	300.0000	22/03/2007 9:46:15 p.m.	Reversed	Reverse

Filter by Status: All Records per Page: 10

From: To:

1 2 3 4

View Export to CSV XLS

From here you can reverse a Pay Anyone transaction by clicking on the 'Reverse' button to the right of the transaction.

The list can be sorted by Pending, Accepted, Declined, Cancelled and Exchange Reversed. You can also define a date range to view by. The number of results per page can also be modified.

You are also able to export the Pay Anyone data as a XLS or CSV file.

CHAPTER SEVEN

Exchange

There are several sections of Exchange Management that must be fully setup prior to your members being able to register and trade online.

We begin with the Exchange Setup Checklist which outlines the most important steps in setting up your exchange. From there we move onto Accepted Payment Methods for your exchange. Credit Card, Direct Debit, and Cheque are covered as methods for collecting Fees from your members.

Contents

Checklist	90
Contact Details.....	92
Default Settings.....	93
Feature Settings.....	94
Payment Methods	97
Sales Team Commission Settings.....	101

Exchange

Checklist

The purpose of this page is to indicate to XO Software the parts of the system you have investigated and setup.

By ticking the relevant boxes (or not ticking) your Project Manager can see where you are at with setting up your exchange. Once you have selected completed items, press 'Save / Sign' to complete the list.

If you have any questions about any of the items on the checklist please contact your designated project manager, or if you are not aware of who that is, please contact XO Software at support@barter-software.com

To view Checklist:

1. To access the Checklist page click Exchange in the main menu and select the Checklist link. This will load the Checklist page shown on the following page.

Exchange

Checklist continued

The purpose of this page is to indicate to XO Software the parts of the system you have investigated and setup. If you have any questions about any of the items on the checklist please contact your designated software manager, or if you are not aware of who that is, please contact XO Software at support@barter-software.com

Phase One - Preliminary Setup

- I have found the checklist, and am aware that I need to complete all the tasks on it
- I have provided XO with a set requirements listing essential changes to the software
- I have organised the front end (B2B) graphics, or I like the existing ones
- I have transferred my domain name to be hosted at XO's name server or a sub-domain is created
- I have submitted Pricing Plans to XO so they maybe uploaded
- I have been provided with training and manuals to use the system to be able to buy and sell items or transfer funds online

Content Management - I have reviewed and completed the following information:

- Contact Information [Content Mgmt >> Contact Us](#)
- First Page Content [Content Mgmt >> First Page](#)
- Terms & Conditions [Content Mgmt >> Terms & Conditions](#)
- Privacy Policy [Content Mgmt >> Privacy Policy](#)
- Security & Compatibility [Content Mgmt >> Security & Compatibility](#)
- Direct Debit form uploaded [Content Mgmt >> Direct Debit Form Uploader](#)
- Methods of Payment selected [Exchange Mgmt >> Accepted Payment Methods](#)
- Exchange Details [Exchange Mgmt >> Exchange Details](#)

Phase Two - Exchange Launch

- I have provided XO with a new set of requirements that are necessary before the launch of the exchange
- I have provided XO with a detailed list of my existing staff and members or an agreement has been reached with XO that will not delay the launch

Phase Three - Maintenance

- I have been given enough information to get SMS setup and have entered the required information in [Communication >> SMS](#)
- I have been provided with all the information that XO has to guide me with the installation of an EFTPOS service
- I have been given enough information to setup a Telephone Banking system for my exchange
- I have been provided with a user name, password and training to efficiently use XO's bug reporting system (Net Office)
- If there is a problem with the software I am aware of the channels provided to help solve the problems.
 1. Call Centre
 2. Assigned Software Manager
 3. Software Director (Daniel Evans)

Press "SAVE / SIGN" to keep track of completed tasks. Once a phase is completely ticked and "SAVE / SIGN" is pressed then the phase is digitally signed for and check boxes are disabled for the particular phase

[Save / Sign](#)

Exchange

Contact Details

Details from this page are used throughout the entire application. Please make sure these are filled correctly as your members will see them on a regular basis while using the system.

There is a further section on how these values are used coming up under Communication in the training manual.

To view Exchange Details:

1. To access the Exchange Details page click Exchange in the main menu and select Exchange Details link. This will load the Exchange Details page shown below.

You are here : Exchange Management >> Exchange Details

Exchange Details		Edit
Exchange Name	Ozone (NZ) Limited	
Currency Name	Ozone dollars	
Tax Details	91711443	
Website Address	www.ozone.net.nz	
Physical Address		
Line 1	PO Box 8781	
Line 2	Symonds St	
Line 3	Auckland	
State		
Country		
Postal Code		
Account Director		
Name	Sam Liu	
E-mail	accounts@ozone.net.nz	
Exchange		
Phone	0800 4 Ozone	
Fax	09-4801636	
E-mail	info@ozone.net.nz	
Reply-To E-mail (ie. no-reply@exchange.com)	noreply@ozone.net.nz	
Call Center		
Phone	0800469663	
Fax	0800269663	
E-mail	info@ozone.net.nz	

To edit Exchange Details:

1. To edit the exchange details click on the Edit button. This will make all fields on the page editable. An example is shown on the next page. Once you've finished editing the information, click on the Update button to save your changes.

Exchange

Default Settings

This page allows you to control what settings your members are allowed to select for themselves.

To view Default Settings:

1. To access the Default Settings page click Exchange in the main menu and select the Default Settings link. This will load the Default Settings page shown on the following page.

Merchant Defaults	
New Merchants will be able to buy	<input checked="" type="checkbox"/>
New Merchants will be able to sell	<input checked="" type="checkbox"/>
New Merchants will be able to perform saved search	<input checked="" type="checkbox"/>
New Merchants will be able to add/manage sub accounts/users	<input checked="" type="checkbox"/>
New Merchants will be able to subscribe to the newsletter	<input checked="" type="checkbox"/>
New Merchants will be able to subscribe to the newsletter	<input checked="" type="checkbox"/>
New Merchants will be able to modify/control their individual time settings	<input checked="" type="checkbox"/>
New Merchants will be able to modify/control their individual time settings	<input checked="" type="checkbox"/>
New Merchants can edit their date of birth after specifying it once already	<input checked="" type="checkbox"/>

[Confirm](#)

To edit Default Settings:

1. To edit which settings you wish your members to be able to choose, tick or un-tick the check box next to the option. When finished press 'Confirm'.

Exchange

Feature Settings

The Feature Settings page is where you can control the more advanced features of the software. You may have all or only some of these features available to you depending on

To view Feature Settings:

1. To access the Feature Settings page click Exchange in the main menu and select the Feature Settings link. This will load the Feature Settings page shown on the following page.

Activate/ De-Activate the following Features			
Feature Name	Link	Status	Enable / Disable
Item Approval	More Details...	Enabled	Disable
PayAnyone	More Details...	Enabled	Disable
IVR(Phone Banking)	More Details...	Enabled	Disable
Plastic Transaction Card	More Details...	Enabled	Disable
Front End Customisation	More Details...	Enabled	Disable
Google Maps		Enabled	Disable
Maximum Credit Balance	More Details...	Enabled	Disable
1099-B Report	More Details...	Enabled	Disable
PayPal	More Details...	Enabled	Disable

To enable/disable Feature Settings:

1. To edit which settings you wish to be enabled or disabled click on the Enable / Disable button to toggle the status.

More Details:

Clicking on the 'More Details' link next to an enabled item will take you to the relevant settings page. The table below gives you a page number for this manual where you will find details on the feature settings.

Feature	Location:	Page
Item Approval	Item > Item Settings	181
Pay Anyone	Pay Anyone > Default Pricing Plan	86
IVR (Phone Banking)	Feature Settings > Phone Banking	95
Plastic Transaction Card	Search > Plastic Transaction Cards	31
Front End Customization	Content > Front End Customization	162
Google Maps	No settings	---
Maximum Credit Balance	Feature Settings > Registration	
1099-B Report	Reports > 1099-B Report	
PayPal	Exchange > Payment Methods	86

Exchange

Feature Settings continued

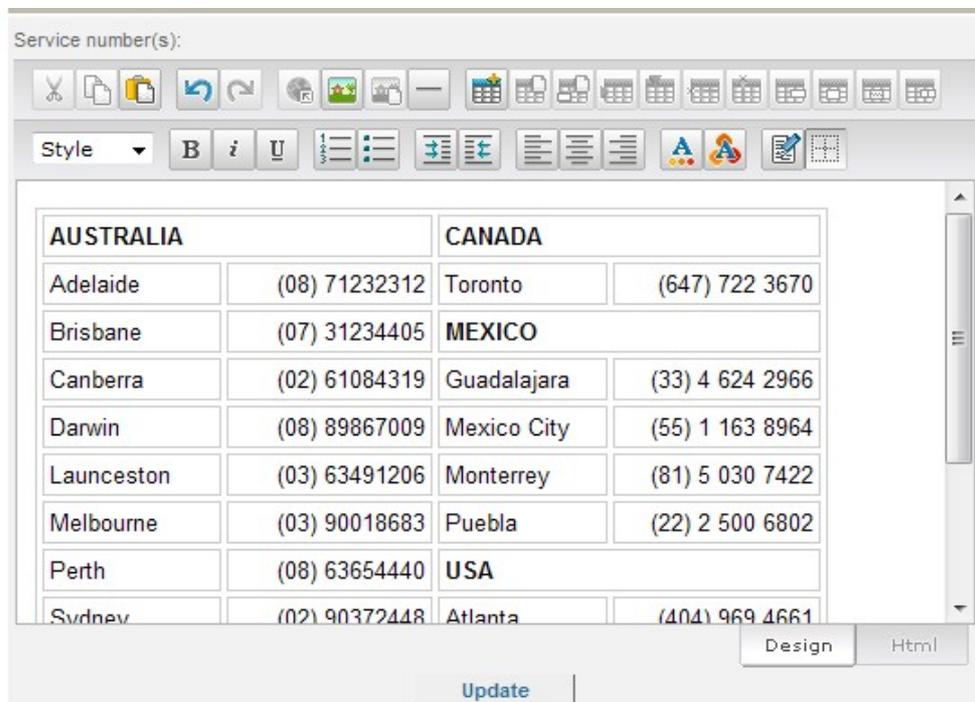
Phone Banking

The Phone Banking settings page allows you to control how your telephone numbers are presented to your members.

To view the Phone Banking page:

1. To access the Telephone Banking page click Exchange in the main menu and select the Feature Settings link. From here, click on the 'more details' link next to IVR (Phone Banking). This will load the Telephone Banking page shown below.

Service number(s):



AUSTRALIA		CANADA	
Adelaide	(08) 71232312	Toronto	(647) 722 3670
Brisbane	(07) 31234405	MEXICO	
Canberra	(02) 61084319	Guadalajara	(33) 4 624 2966
Darwin	(08) 89867009	Mexico City	(55) 1 163 8964
Launceston	(03) 63491206	Monterrey	(81) 5 030 7422
Melbourne	(03) 90018683	Puebla	(22) 2 500 6802
Perth	(08) 63654440	USA	
Sydney	(02) 90372448	Atlanta	(404) 969 4661

Update Design Html

To edit service numbers:

1. Entering information onto this page is just like creating an email template. You can customize how and what numbers are displayed to your members. After entering, press the 'Update' button to apply the changes.



NOTE: You will have to contact your project manager for your telephone banking numbers which have been assigned to your exchange. Also note that this number is for an automated calling service, not for your call centre number.

Exchange

Feature Settings continued

Maximum Credit Balance

Maximum Credit Balance works like an over draft except in reverse. Using this feature you can control how much a member can be in credit before their products and services become temporarily hidden and are also suspended from selling until their account balance is lower than their Maximum Credit Balance.

To view the Maximum Credit Balance page:

1. To access the Maximum Credit Balance page click Exchange in the main menu and select the Feature Settings link. From here, click on the 'more details' link next to Maximum Credit Balance. This will load the Maximum Credit Balance page shown below.

Membership Registration Page	
Name:	Registration Form
Type of Tax Details Collected:	GST
Has business members?	Yes
Overdraft limits:	0, 1000, 2000, 3000, 5000, 10000, 20000, 50000,
Estimated Annual Turnover:	Less Than \$100K, \$100K - \$1M, \$1M - \$10M, Greater Than \$10M,
Maximum Credit Balance Global Settings	
Activate Maximum Credit Balance:	Yes
Maximum Credit Balance:	unlimited,
Allow Member to Control Maximum Credit Balance:	No
Edit	

To edit Maximum Credit Balance:

1. Entering information onto this page is like creating overdraft limits. See Content → Content Text → Registration Details. You can add new values by entering them and pressing 'Add'. You can also change whether you want to allow members to change their own Maximum Credit Balance. Once you have finished your changes, press 'Update'.

Maximum Credit Balance Global Settings	
Maximum Credit Balance:	new item added
<input type="text"/>	Add
<div style="border: 1px solid #ccc; padding: 2px;"> unlimited 20000 </div>	<div style="border: 1px solid #ccc; padding: 2px; text-align: center;"> ▲ X ▼ </div>
Allow member to control maximum credit balance: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Update Cancel	

Exchange

Payment Methods

This page allows you to specify which methods your exchange deems as acceptable for members to pay their cash fees. Note if you have Trade Dollar/Barter Dollar fees setup in your pricing plan, then these are charged automatically from a members' account and transferred into the main exchange account (the first account that was created for you when your exchange was activated by XO Software). The Trade Dollar/Barter Dollar fees are not discussed further in Accepted Payment Methods.

Credit Card, Direct Debit, and Posted Payment by Cheque are covered in this section.

To view Payment Methods:

1. To access the Payment Methods page click Exchange in the main menu and select the Payment Methods link. This will load the Payment Methods page shown below.

You are here : Exchange Management >> Accepted Payment Methods

Accepted Payment Methods		Edit
<input checked="" type="checkbox"/>	Direct Debit	
<input checked="" type="checkbox"/>	Credit Card	
Credit Card Types:	AMERICAN EXPRESS, DINERS CLUB CARD, MASTERCARD, VISA,	
<input checked="" type="checkbox"/>	Direct Credit to Bank Account	
Account Name:	Ozone (NZ) Limited	
Bank Name:	Westpac	
Bank Branch Name:	Parnell	
Account Number:	03-0239-0154239-000	
<input checked="" type="checkbox"/>	Posted Payment / Cheque	
Address given to members to send cheques will be the same as entered in Exchange details		
<input checked="" type="checkbox"/>	Paypal	

Credit Card:

If you enable Credit Card as a payment option from this page, this will allow your members to register their Credit Card details on the B2B trading site.

Exchange

Payment Methods continued

To register a credit card from the B2B site you must be a member of the exchange and you must be logged in to the B2B site with the username and password.

If you are a member logged in to the B2B site you can access the credit card registration page by clicking on MY ACCOUNT → Pay My Cash Fees, and then clicking on Payment Registration. This will take the member to a new page where they can register a credit card. Once the credit card is registered, a record of it is kept in the system.

Once a month or at a time interval set by the exchange, administration staff can run a report, and extract ALL necessary details, such as credit card number, expiry date, CASH DUE, etc. into a CSV report. This CSV report can then be processed by your local bank.

If you disable this as a payment option, then your members will not be able to enter their credit card details and they will not be able to register their credit cards on the B2B site.

Direct Debit:

Enabling this feature allows your members to download a Direct Debit form from the B2B trading website.

If you are a member logged in to the B2B site you can access the Direct Debit form by clicking on MY ACCOUNT → Pay My Cash Fees, and then clicking on Payment Registration. This will take the member to a new page where they can download the Direct Debit form. Once downloaded this form can be printed and mailed back to the exchange.

If you disable this feature, members will not be able to print Direct Debit Forms from the B2B site. You can disable this feature and allow members to only register for Direct Debit by contacting the exchange directly.

Cheque/Posted Payment:

This option is for Exchange records only. It lets your staff members know whether your exchange accepts Cheque or not. If it is enabled then your staff will know to accept a Cheque sent in by your members. If it is disabled, then this can be used to indicate you don't want to accept payments in the form of Cheque. It is normal to contact members once you've processed their Cheque transaction, and inform them of this.

Exchange

Payment Methods continued

To edit Accepted Payment methods:

1. Click on the Edit button located on the right hand side of the page.
2. The screen will now change to an editable version as shown below.

You are here : Exchange Management >> Accepted Payment Methods

Accepted Payment Methods Update Cancel

Direct Debit

Credit Card

Credit Card Types:

Add

AMERICAN EXPRESS
DINERS CLUB CARD
MASTERCARD
VISA

Direct Credit to Bank Account

Account Name:

Bank Name:

Bank Branch Name:

Account Number:

Posted Payment / Cheque

Address given to members to send cheques will be the same as entered in Exchange details

Paypal

3. Select the checkbox of the payment method that you'd like to activate for this exchange, or alternatively de-select the payment method that you'd like to remove.
4. When an option is checked it expands to allow you to enter the necessary information. An example with all options checked is shown above.

Exchange

Payment Methods continued

Let's use the Credit Card option as an example. At the moment it's empty. To enter a new accepted Credit Card into the system the administrator would type VISA into the first text box and click the Add button.

You would then enter MasterCard and click on the Add button again. This can be repeated as many times as necessary. Once entered these options are immediately made available to all your members. Members can now register Credit Cards for their payment method from the B2B trading website.

Different Exchanges have preference to different cards. Depending on the merchant account and bank you use, you can choose to enter as many different card types as you wish. Different countries have different types of credit cards. The XO Software platform is designed to support and accept payment from any credit card.

5. After adding the required information you will have a page similar to the one above. Note, to add Credit Card Types, simply type them in the text field and click the Add button adjacent to it.
 6. Click on the Update button to save the information. The Accepted Payment Methods page should now reflect the changes you've introduced. An example is shown below.
-

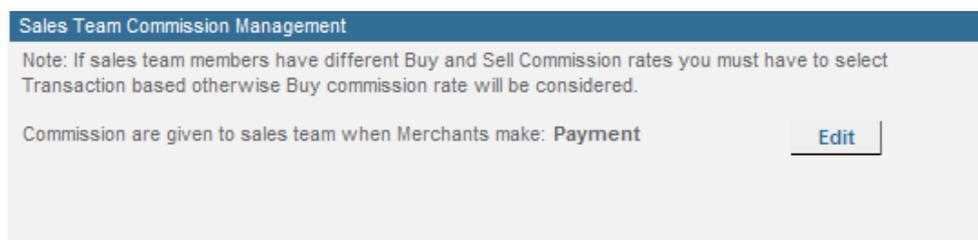
Exchange

Sales Team Commission Settings

From this page you can control when members of the sales team are paid their commission payments.

To view the Sales Team Commission Settings page:

1. To access the Sales Team Commission Settings page click Exchange in the main menu and select Sales Team Commission Settings link. This will load the Sales Team Commission Settings page shown below.



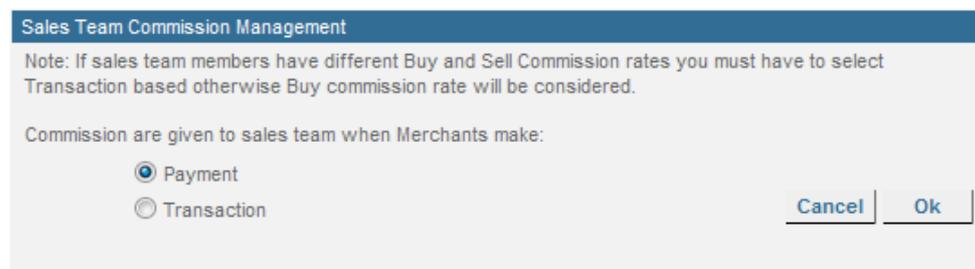
Sales Team Commission Management

Note: If sales team members have different Buy and Sell Commission rates you must have to select Transaction based otherwise Buy commission rate will be considered.

Commission are given to sales team when Merchants make: **Payment** [Edit](#)

Editing Sales Team Commission Settings:

1. To edit the settings, press the 'Edit' button. Selecting payment means that the broker assigned to a member will not be paid his or her commission on a transaction until that member pays their cash fees owing.
2. Selecting 'Transaction' will mean that a broker assigned to a member will be paid as soon as the transaction is made.
3. Press 'OK' to confirm your changes.



Sales Team Commission Management

Note: If sales team members have different Buy and Sell Commission rates you must have to select Transaction based otherwise Buy commission rate will be considered.

Commission are given to sales team when Merchants make:

Payment
 Transaction

[Cancel](#) [Ok](#)

CHAPTER EIGHT

Pricing

For trade to occur each member requires that a pricing plan is applied to their account. Members will be allowed to choose among a variety of plans, provided that these are offered by the exchange administration. The “make this plan available online” feature must be enabled by XO Software otherwise members will not be able to choose a pricing plan online. Without enabling this feature our system only supports 1 pricing plan per member. This pricing plan must be assigned by an authorized exchange staff member from the backend. You can change members from one pricing plan to another at any time.

Contents

Account Adjustment Type	103
Fees & Rates	105
Pricing Plan	107
Members by Pricing Plan	109

Pricing

Account Adjustment Type

Account Adjustment Types allow to you credit or debit cash or barter amounts to a members account. This can be used for sundry charges such as fee for having a cheque bounce, or giving a member a 10% discount for paying their fees promptly.

To view Account Adjustment Type:

1. To access the Account Adjustment Type page click Pricing in the Main menu and select the Account Adjustment Type link. This will load the Account Adjustment Type page shown below.

This page is used to create and edit new Account Adjustment type. [To make an account adjustment transaction click here](#)

An Account Adjustment transaction is used to create a transaction without incurring a commission. It is a transaction between the exchange and a member. Some example of account adjustment types are: Fees, Bonuses and Penalty.

New Account Adjustment Type

Name :

Fixed Adjustment Amount positive amount = credit adjustment = bonus

Cash : PLN

Barter : PLN

Percentage Adjustment (This is used if the adjustment is calculated from another amount, e.g. Cash Balance)

Cash : %

Barter : %

[Add](#)

Name	Cash Amount	Barter Amount	Cash Percentage	Barter Percentage	
Dishonoured check fee	PLN10.00	10.00PLN	0	0	Edit Delete
Kara	PLN0.00	0.00PLN	5	0	Edit Delete
Bonuses	PLN150.00	150.00PLN	0	0	Edit Delete
penalty	PLN0.00	0.00PLN	11	11	Edit Delete

Creating a new Account Adjustment Type:

1. Start by entering a name for the adjustment type, this will be displayed on the members statement so make sure that it is easily identifiable. For example this could be Bounced Cheque fee, or Reimbursement of Cash Fees.

Pricing

Account Adjustment Type continued

2. Enter a fixed amount for the cash and barter adjustment amounts. If there is no fixed amount then enter zero.
3. You can also enter a percentage adjustment for both the cash and barter. This can be used later to calculate a percentage amount of another value, such as amount owed. If you do not want to use percentage, then enter zero.
4. Once you are finished, press 'Add'. The Adjustment Type will be added to the system.

Deleting and Editing Account Adjustment Types:

1. To delete or edit adjustment types, press the 'Delete' or 'Edit' link next to the name of the desired type.



NOTE: No cash or barter commission is generated on account adjustments.

To use Account Adjustment types see Chapter Five, 'Transactions' on page 69.

Pricing

Fees & Rates

Transaction Fees also known as Commission Rates, Monthly and Annual Fees are assigned to every member in the system. Once these are created, you can make a Pricing Plan that uses any combination of the Fees and Rates currently in the system.

To view Fees & Rates:

- To access the Fees & Rates page click Pricing in the Main menu and select the Fees & Rates link. This will load the Fees & Rates page.

You are here : Pricing Management >> Fees & Rates

Transaction Fee

Add New Transaction Fees : Accounts

Buy Rates		Sell Rates		
Cash	Barter	Cash	Barter	
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	Add

	Buy Rate		Sell Rate		
	Default	Cash	Barter	Cash	
<input type="radio"/>	0%	0%	0%	0%	Edit
<input type="radio"/>	1.25%	1.25%	1.25%	1.25%	Edit
<input type="radio"/>	2%	0.5%	2%	0.5%	Edit
<input checked="" type="radio"/>	0.5%	0.5%	0.5%	0.5%	Edit
<input type="radio"/>	0.75%	0.5%	0.75%	0.5%	Edit
<input type="radio"/>	2.5%	0%	2.5%	0%	Edit
<input type="radio"/>	5%	0%	5%	0%	Edit
<input type="radio"/>	5.25%	0%	5.25%	0%	Edit
<input type="radio"/>	5%	0%	2.5%	0%	Edit
<input type="radio"/>	0%	2.5%	0%	2.5%	Edit
<input type="radio"/>	3%	0%	3%	0%	Edit
<input type="radio"/>	1%	1%	1%	1%	Edit

To edit Fees & Rates:

- To add a new commission rate enter a percentage rate in each of the 4 fields and click the Add button.

Pricing

Fees & Rates continued

- To edit commission rates click on the Edit link, change the values required, then click Update.

Monthly Fees

Add New Monthly Fees : Accounts

Cash Barter Day Charged Day:

Monthly Fees			
Default	Cash	Barter	Day Charged
	\$0.00	\$0.00	1st Edit
	\$5.00	\$0.00	28th Edit
	<input type="text" value="0"/>	<input type="text" value="10"/>	<input type="text" value="1"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>
	\$15.00	\$0.00	1st Edit
	\$15.00	\$15.00	1st Edit
	\$15.00	\$10.00	1st Edit

- To Delete a commission rate click on the Edit link, and then click on the Delete button.

Annual Fees

Add New Annual Fees : Accounts

Cash Barter Date Charged
 From date of joining
 Specify Date: /

Annual Fees			
Default	Cash	Barter	Date Charged
<input type="radio"/>	\$0.00	\$0.00	from join date Edit

SMS Usage Fees

SMS Usage Fees (Charged to Members)

Cash Amount	Barter Amount
\$0.20	\$0.00

- For Monthly and Annual Fees simply repeat the process described above regarding the commission rates.

Pricing

Pricing Plan

The Pricing Plan page provides a summary of all plans kept on record in the system.

You can use this page to check on the Pricing Plans you've created at any time. These can be renamed, edited, and deleted. You can also use our system to view all members that belong to a particular Pricing Plan, and to do bulk re-assign of members from one pricing plan to another.

To view Pricing Plan:

1. To access the Pricing Plan page click Pricing in the Main menu and select the Pricing Plan link. This will load the Pricing Plan page.

You are here : Pricing Management >> Pricing Plan

[Add New Pricing Plan](#)

Plan Name	Default	Open To Members	Join Fee (Barter)	Join Fee (Cash)	Monthly Fee	Annual Fee	Commission Rates
Basic	No	No	\$0.00	\$500.65	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Buy Cash: 3% Barter: 0% Sell Cash: 3% Barter: 0%
Basic	No	No	\$0.00	\$0.00	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Buy Cash: 0% Barter: 0% Sell Cash: 0% Barter: 0%
Basic	No	No	\$0.00	\$0.00	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Cash: \$0.00 Barter: \$0.00 Day Charged: 1st	Buy Cash: 2.5% Barter: 0% Sell Cash: 2.5% Barter: 0%



IMPORTANT: Members will be charged their joining fees based on the details you've setup in Exchange → Edit Registration Details and NOT based on the Default plan joining fee. This will change if you ask XO Software to disable the basic joining fee under Exchange Mgmt.

You can edit a plan by clicking on the plan's name. This will take you to a page similar to the New Pricing Plan page in the previous section of this training manual.

Pricing

Pricing Plan continued

To create a new pricing plan:

Members are charged based on an assigned pricing plan. From the New Pricing Plan page you can create custom pricing plans to cater for various member requirements. Once created these pricing plans can be viewed and edited from the Pricing Plan page under Pricing.

1. To access the New Pricing Plan page click Pricing in the Main menu and select the Pricing Plan. This will load the Pricing Plan page. Select the Add New Pricing Plan link.

You are here : Pricing Management >> New Pricing Plan

[Back to Pricing Plans](#)

New Pricing Plan

Plan Name

Default Pricing Plan
 Open To Members

Join Fee Barter Cash

Annual Fees			
	Cash	Barter	Date Charged
<input type="radio"/>	\$0.00	\$0.00	from join date

Monthly Fees			
	Cash	Barter	Day Charged
<input type="radio"/>	\$0.00	\$0.00	1st
<input type="radio"/>	\$5.00	\$0.00	28th
<input type="radio"/>	\$0.00	\$10.00	1st
<input type="radio"/>	\$15.00	\$0.00	1st
<input type="radio"/>	\$15.00	\$15.00	1st
<input type="radio"/>	\$15.00	\$10.00	1st



NOTE: The Fees and Rates shown on this page will depend on the previous step we just completed by creating Fees and Rates in our backend. For example if you created only one set of Fees and Rates for the Transaction Fee section, then you will only see that one set shown on screen when and you will only be able to create Pricing Plans from those options that you previously added to Fees and Rates.

Pricing

Members by Pricing Plan

The Members by Pricing Plan page allows you to view all members on a specific pricing plan while also allowing you to reassign members to another pricing plan if needed.

To view members by pricing plan:

1. To access the Members by Pricing Plan page click Pricing in the main menu and select the Members by Pricing Plan link. This will load the Members by Pricing Plan page shown below.

You are here : Pricing Management >> Members by Pricing Plan

[Click here for help](#)

List All the Members who belong to Pricing Plan:

Shift To

<input type="checkbox"/>	Business Name	Permission	Cash Balance	Barter Balance	Overdraft Limit
<input type="checkbox"/>	[Blurred]	Valid	-\$24.81	\$1263.80	\$3000.00
<input type="checkbox"/>	[Blurred]	Valid	-\$54.00	-\$300.00	\$500.00
<input type="checkbox"/>	[Blurred]	Valid	\$124.02	-\$134.12	\$5000.00
<input type="checkbox"/>	[Blurred]	Pending	\$0.00	\$0.00	\$10000.00

View specific Pricing Plan:

1. Select a Pricing Plan from the dropdown box. A list will be displayed of all the Businesses on that Pricing Plan.

To change a member's Pricing Plan:

1. After choosing a Pricing Plan from the drop down box, check the checkbox next to the member you would like to change plans. (Selecting the checkbox on the top right will select all members in the table).
2. Choose the plan you would like to move the members to from the 'shift to' dropdown box
3. Press Shift To to make the changes.

CHAPTER NINE

Staff

Your customers will need an Account Representative / Trade Broker / Sales Person to take care of your customer's needs, such as finding products or services and promoting them to other members.

Assigning an Account Representative also helps with managing supply and demand for that member's services to keep their earning/spending in balance.

Usually, this person is also responsible for registering the new member and will spend time with them educating them about barter, and how to use the system.

Contents

Clients List.....	111
Exchange Staff.....	112
Re-Assign Accounts	115
Sales Team.....	116
Broker	119
Associate Broker.....	120
Staff Permissions	121

Staff

Clients List

The Clients List page can produce a list of all exchange members that are assigned to a selected Sales Person.

To view Clients List:

To access the Clients List page click Staff in the Main menu and select the Clients List link. This will load the first page of the Clients List shown below.

You are here : Staff Management >> Clients List

Select

Total Clients Number: 4

Business Name	Contact	Address	Contact Person
Ejan Limited		PO Box 8788 Symonds Street Auckland	Daniel Evans Other daniel.evans@barter-software.com
XO-jonathan		703d Great North Road Grey Lynn Auckland	Jonathan Bruce Fantham Owner / Partner workrelated@fantham.net
XO-Ranny		Unit V, 15 Karaka St Newton Auckland	Ranny Kettoola CEO / President saputz+rannyUser@gmail.com
XOPhillip		149 Nelson Street Auckland CBD Auckland	Phillip Dimitrov Owner / Partner phillip.dimitrov@gmail.com

Change all the clients of to

To view specific clients:

- To view a list of all members associated with a specific Sales Person, select the name of the Sales Person from the dropdown list and press Show Results.

Clicking on the name of a member will take you to the Member → Member Information page.

To reassign members:

This page also allows to you reassign all members of one Sales Person to another. After completing Step 1, select the Sales Person you would like to transfer the members to from the lower dropdown box and press Confirm.

Staff

Exchange Staff

The Exchange Staff Page is where you can view and modify and create people who have access to the Administration end of your exchange.

To view Exchange Staff:

1. To access the Exchange Staff page click Staff in the main menu and select the Staff link. This will load the Exchange Staff page shown below.

You are here : Staff Management >> Exchange Staff

[Add New Exchange Staff](#)

Username	Name	Status	Email	Phone
amyT	Amy Thomas	Valid	Work: teamleader@corpcall.co.nz Home: teamleader@corpcall.co.nz	Work: 049108000 Home: 049108000 Mobile:272410274
andrewM	Andrew Morrow	Valid	Work: andrew@corpcall.co.nz Home: andrew@corpcall.co.nz	Work: 049108000 Home: 049108000 Mobile:272410274
AnnR	Ann Rowell	Valid	Work: ann@corpcall.co.nz Home: ann@corpcall.co.nz	Work: 049108000 Home: 049108000 Mobile:272410274
beaker	Tim Gordon	Valid	Work: tim.gordon@barter-software.com Home: gordon-t@xtra.co.nz	Work: 099156873 Home: 094459884 Mobile:0212957841
bop	Kathy O'Connor (Bay of Plenty)	Valid	Work: kathy.oconnor@ozone.net.nz Home: kathy.oconnor@ozone.net.nz	Work: 094801625 Home: 0 Mobile:94801625

From here you can see the most common user information, such as their username, email and telephone numbers.

To modify a user's details:

1. To modify a user's details, select their username from the left-hand column. This will take you to the Modify User page. For more information see creating new exchange staff.

To create New Exchange Staff:

New staff member must have an account registered before they can interact with the system. Information about them can be recorded using the New Exchange Staff page. Details such as their, first name, surname, and username, phone numbers, department, and access privileges can be entered against their record, and later accessed and modified.

Staff

Exchange Staff continued

1. To access the New Exchange Staff page click Staff Mgmt in the Main menu and select the New Exchange Staff link. This will load the first page of the New Exchange Staff shown below.
2. To create a new staff member simply fill in all the required fields marked with a (*) and any of the optional fields you choose to and press Next..

General Details	
Username	<input type="text"/> *
Password	<input type="text"/> *
Confirm Password	<input type="text"/> *
Permission	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
First Name	<input type="text"/> *
Last Name	<input type="text"/> *
Title (Mr/Mrs/Miss)	<input type="text"/> *
Department (Access Privileges)	Sales <input type="button" value="v"/>
Address	
Street	<input type="text"/> *
Suburb	<input type="text"/> *
City	<input type="text"/> *
Postal Code	<input type="text"/>
Work Phone	<input type="text"/> *
Work Fax	<input type="text"/> *
Work Email	<input type="text"/> *
Home Phone	<input type="text"/> *
Home Fax	<input type="text"/> *
Home Email	<input type="text"/> *

3. It is very important to place staff members in the correct department, as this determines the access privileges for that staff member.



NOTE: See the appendix for a list of departments and their access privileges.

4. When you've completed both pages of the form, click on the Confirm button to submit the information.

Staff

Exchange Staff continued

You are here : Staff Management >> New Exchange Staff

ID Details

Passport #

Issue Country

Issue Date

Expiry Date

Passport Photo

Driver License #

Issue Country

Issue Date

Expiry Date

Drivers License Photo

Staff Photo

Publish Staff Photo Yes No

General Information

Background

Publish Yes No

Staff

Re-Assign Accounts

The Re-Assign Accounts page is used to easily change many members Sales Person at once. From here you can assign all the Clients of one Sales Person to another (Valid) Sales Person. This feature is useful for example when a Sales Person leaves

To view Re-Assign Accounts:

1. To access the Re-Assign Accounts page click Staff in the main menu and select the Staff link. This will load the Re-Assign Accounts page shown below.

The screenshot shows the 'Re-Assign Accounts' page. At the top, a breadcrumb trail reads 'You are here : Staff Management >> Re-Assign Accounts'. Below this, there are two main sections. The first section is titled 'Change all the clients of' and contains two dropdown menus: 'All Salesperson' and 'Valid Salesperson', both currently showing '- Select one -'. A 'Confirm' button is located to the right of the second dropdown. The second section is titled 'Re-assign all accounts whose sales rep is not VALID to' and contains a single dropdown menu labeled 'Valid Salesperson' with '- Select one -' selected, and a 'Confirm' button to its right.

To re-assign clients:

1. Select the Sales Person whose Clients you would like to replace from the 'All Salesperson' dropdown box. Next, select the Sales Person you would like the Clients to be reassigned to from the upper right-hand 'Valid Salesperson' dropdown box, and press Confirm.
2. To re-assign all accounts that have a non-Valid Sales Person to another. Select the name of the Sales Person from the lower right-hand 'Valid Salesperson' dropdown box and press Confirm.

Staff

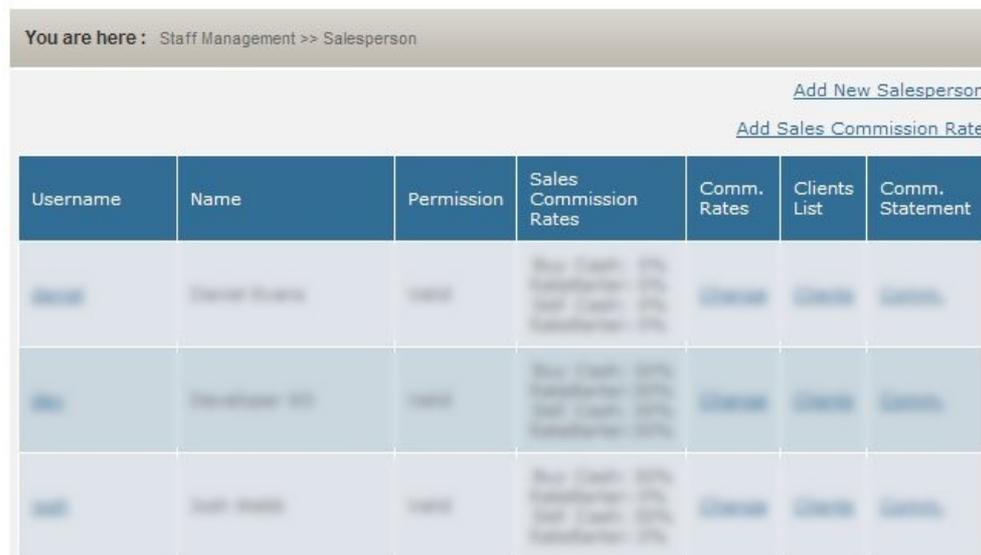
Sales Team

Each business that signs up to your exchange must have an assigned salesperson before they can use their account to trade. A salesperson is the staff member that the client will deal with when they have problems or queries. The wording of 'Salesperson' can be changed under Translation.

Upon exchange creation there are no salespersons assigned. You must create salespersons out of admin members, and then assign these salespersons to your clients.

To View Sales Team:

1. To access the Sales Team page click Staff in the Main menu and select the Sales Team link. This will load the Sales Team page shown below.



The screenshot shows a web interface for managing salespeople. At the top, a breadcrumb trail reads "You are here : Staff Management >> Salesperson". Below this, there are two links: "Add New Salesperson" and "Add Sales Commission Rate". The main content is a table with the following columns: Username, Name, Permission, Sales Commission Rates, Comm. Rates, Clients List, and Comm. Statement. The table currently contains three rows of data, which are mostly blurred.

Username	Name	Permission	Sales Commission Rates	Comm. Rates	Clients List	Comm. Statement
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]

This page displays a list of all salespeople in the exchange. It will probably be empty for your exchange provided that no one has previously setup any salespeople.

Staff

Sales Team continued

To add new sales person:

1. Click on the Add New Salesperson link at the top right hand side of the page. The page will now change to the one shown in the screenshot below.

You are here :

[Back to Salesperson](#)

Select Salesperson from the Exchange Staff:

Select Sales Commission Rate for the Salesperson:

	BuyRateCash	BuyRateBarter	SellRateCash	SellRateBarter
<input type="checkbox"/>	15 %	15 %	15 %	15 %
<input type="checkbox"/>	0 %	0 %	0 %	0 %
<input checked="" type="checkbox"/>	20 %	20 %	20 %	20 %
<input type="checkbox"/>	30 %	30 %	30 %	30 %
<input type="checkbox"/>	33 %	33 %	33 %	33 %

2. Select the Admin staff member who you wish to assign Sales Person status to.
3. Select a commission rate from the list provided.
4. Click on the Confirm button.

Once a salesperson has been created in the system you can assign them to a member's account at any time by going to Member Mgmt → Member Details and clicking on a specific member. This will bring up that member's Account Details. You can then edit these details and change the salesperson to any currently registered in the system.

Staff

Sales Team continued

Adding, Deleting and Updating Sales Commission Rates:

1. Click on the Add Sales Commission link at the top right hand side of the Salesperson page. The page will now change to the one shown in the screenshot below.

[Back to Salesperson](#)

Add New Commission Rates : Salesperson

Buy Rates Sell Rates

Cash Barter Cash Barter

% % % % [Add](#)

Buy Rate		Sell Rate		
Cash	Barter	Cash	Barter	
15%	15%	15%	15%	Edit
0%	0%	0%	0%	Edit
<input type="text"/> 20 %	Update Delete Cancel			
30%	30%	30%	30%	Edit
33%	33%	33%	33%	Edit
15%	0%	15%	0%	Edit
30%	0%	30%	0%	Edit
30%	0%	30%	0%	Edit
1%	0%	1%	0%	Edit
50%	0%	50%	0%	Edit

2. To add a new rate, enter the percentage amounts in the Add New Commission Rates boxes and press the 'Add' button.
3. To edit or delete an existing rate, click on the Edit button next to the rate you would like.
4. Change the percentages to the desired values and select 'Update'. If you would like to delete the selection, press 'Delete'.

Staff

Broker

Broker is the next level after a Salesperson. For example, the Salesperson can be the owner of the exchange and the Broker a sales manager and the Associate Broker a client manager

Using this feature, you can create different commission rates to create a structure that suits your needs. The method for creating a Broker and assigning commission rates is the same as Sales Team.

To view Broker:

1. To access the Broker page click Staff in the Main menu and select the Broker link. This will load the Broker page shown below.

Add New Broker Add Sales Commission Rate						
Username	Name	Permission	Sales Commission Rates	Comm. Rates	Clients List	Comm. Statement
Agnieszka Mrowiec	Agnieszka Mrowiec	Valid	Buy Cash: 0% RateBarter: 0% Sell Cash: 0% RateBarter: 0%	Change	Clients	View
Agnieszka Rachwał	Agnieszka Rachwał	Valid	Buy Cash: 5% RateBarter: 1% Sell Cash: 5% RateBarter: 1%	Change	Clients	View
Aleksandra	Aleksandra Ćwikła	Valid	Buy Cash: 40% RateBarter: 50% Sell Cash: 40% RateBarter: 50%	Change	Clients	View
Alicja	Alicja Aleksandra	Valid	Buy Cash: 1.5% RateBarter: 2% Sell Cash: 1.5% RateBarter: 2%	Change	Clients	View

Staff

Associate Broker

Associate Broker is the next level after Salesperson and Broker. For example, the Salesperson can be the owner of the exchange and the Broker a sales manager and the Associate Broker a client manager

Using this feature, you can create different commission rates to create a structure that suits your needs. The method for creating a Broker and assigning commission rates is the same as Sales Team.

To view Associate Broker:

1. To access the Associate Broker page click Staff in the Main menu and select the Associate Broker link. This will load the Associate Broker page shown below.

Add New Broker Add Sales Commission Rate						
Username	Name	Permission	Sales Commission Rates	Comm. Rates	Clients List	Comm. Statement
Agnieszka Mrowiec	Agnieszka Mrowiec	Valid	Buy Cash: 0% RateBarter: 0% Sell Cash: 0% RateBarter: 0%	Change	Clients	View
Agnieszka Rachwał	Agnieszka Rachwał	Valid	Buy Cash: 5% RateBarter: 1% Sell Cash: 5% RateBarter: 1%	Change	Clients	View
Aleksandra	Aleksandra Ćwikła	Valid	Buy Cash: 40% RateBarter: 50% Sell Cash: 40% RateBarter: 50%	Change	Clients	View
Alicja	Alicja Aleksandra	Valid	Buy Cash: 1.5% RateBarter: 2% Sell Cash: 1.5% RateBarter: 2%	Change	Clients	View

Staff

Staff Permissions

Associate Broker is the next level after Salesperson and Broker. For example, the Salesperson can be the owner of the exchange and the Broker a sales manager and the Associate Broker a client manager

Using this feature, you can create different commission rates to create a structure that suits your needs. The method for creating a Broker and assigning commission rates is the same as Sales Team.

To view Associate Broker:

2. To access the Associate Broker page click Staff in the Main menu and select the Associate Broker link. This will load the Associate Broker page shown below.

CHAPTER TEN

Reports

The Reports function provides a formal account of the proceedings and transactions of the exchange and its members.

From here you can also gain access to important marketing and sales information; so you can keep an eye on trading volumes, commission payments and more.

Contents

Reports	123
Statements	127

Reports

Reports

The Reports page is the starting point for accessing useful reporting features available in the software.

To view Reports:

To access the Reports page click Reports in the Main menu and select the Reports link. This will load the Reports page shown below.

Reports		
All Members Information	CSV	XLS
All Members Emails	CSV	XLS
All Members Cash Due	CSV	XLS
All Members With No Plastic Transaction Cards	CSV	XLS
Directory Listing	CSV	XLS
Outstanding Direct Debit Commission Fees	CSV	XLS
<hr/>		
Aged Cash Due Report		
Clients List with Trading		
Commission Accounts		
Monthly Cash Balance (Formerly Trial Balance)		
Referrals		
Sales Performance		
Sales Purchase Report		
Sales Commission Report		
Transactions and Fees		



NOTE: All reports can be downloaded as Microsoft Excel CSV or XLS files.

The reports page is divided into two sections, common information such as member contact information and members with cash due.

Reports

Reports continued

Common Information Reports:

Report	Description
All Members Information	A table of all members contact information. Includes addresses and telephone numbers.
All Members Emails	A list of all valid members email addresses which can be used to send using an external email application.
All Members Cash Due	A table of all members with cash due to the exchange, including automatic payment details.
All Members with no Plastic Transaction Card	A list of all members who do not hold a valid transaction card.
Directory Listings	A table of all information contained in online directory listings that can be used to produce a printed Membership Directory.
Outstanding Direct Debit Commission Fees	A report of outstanding fees owed by members who pay by direct debit.

Advanced Reports:

The following section will deal with the more advanced reporting functions available to exchange staff and cover their real world uses. All reports are able to be viewed online and can be downloaded.

Aged Cash Due Report:

This page shows the aged cash due or overdue over a monthly period from the last due date until report date.

Clients List with Trading:

Produces a report of all members of a specified client with their trading history [in barter dollars].

Commission Accounts:

Lists all members with commission fees owing in the selected date range

Reports

Reports continued

Exchange Income

Displays the income for the exchange over a specific date range

Monthly Cash Balance:

Allows a user to view detailed information on cash owing, such as 'All members with more than \$120 owing over 3 months ago'.

Pending Orders Report:

Shows a list of all orders made through the online trading site that are currently pending. The report can be made up of ordered, quoted, confirmed and complained status'.

Referrals:

Shows a report of all referral information that has been recorded in the system by brokers and new members.

Sales Team Performance Report

Measures the sales / purchases amount of the Sales Team over a period of time. Sales / purchases are member to member transactions that are completed (not pending). Reversal of this will decrease the sales / purchases amount. Pending Transactions (PayAnyone, Product and Service) and member to exchange transactions such as Fees and Commission are not included in this amount.

The Sales Team members involved in transactions have only been recorded since 21 June 2007. Transactions before this date have "None Assigned" as the name of the Sales Team member.

Sales Purchase Report:

A report showing the combined trade amount of all members managed by a specific salesperson/broker.

Sales Commission Report:

Details commission payment amounts for sales people by date range. Entering of commission payments to brokers is also performed from here.

Trade Volume by Salesperson, Broker and Associate Broker:

A report showing a trade volume for certain Salesperson, Broker or Associate Broker. You can also select the dates if you want to see the transaction volume for a certain period.

Transactions and Fees:

Shows all transactions, fees and reversals made within a defined time period.

Reports

Reports continued

Pay Anyone Report:
See Pay Anyone → View on page 88.

Reports

Statements

The Statements page is responsible for producing member account statements. From here you also have the option of preparing statements for bulk sending either by email or post.

To view Statements:

To access the Statements page click Reports in the Main menu and select the Statements link. This will load the Statements page shown below.

The screenshot shows a web form for generating statements. It includes a 'Company' dropdown menu with 'XO Limited [Valid]' selected. Below it are two radio button options: 'By Statement Set' (selected) with a 'Current' dropdown, and 'By Date Range' with 'FROM' and 'TO' date input fields (19/02/2007 and 19/04/2007) and 'Select Date' buttons. A 'Batch Statement:' section contains a 'Merge' button and a row of buttons for 'View', 'E-mail', 'Print', 'CSV', and 'XLS'. At the bottom, there is a 'Create statement set' section with explanatory text and a 'Generate Statement Set' button.

Producing a member's account statement:

1. To produce a member statement, start by selecting the name of the company from the dropdown list.
2. Select whether you want to produce the statement by Statement Set or by Date Range. Select your desired option and then either the wanted statement set or 'to' and 'from' dates.
3. Next, select how you would like to work with the transaction by selecting one of the following options:

View: Will display the statement for the period defined in the window.

E-mail: Will e-mail a copy of the statement to the member's registered e-mail address.

Print: Selecting print will load a popup window with a version of the statement suitable for printing and posting to a member.

Reports

Statements continued



NOTE: Make sure that your browser allows popup windows to load.

CSV and XLS: Will allow you to download the information. Both these formats allow transaction data for be loaded into most popular financial packages.

CHAPTER ELEVEN

Communication

The XO Barter Software platform contains a highly integrated communications module and provides you with a variety of features to keep communication channels flowing freely between members and the exchange.

For example members are able to subscribe to weekly newsletters, exchange administrators are able to send SMS Text messages to target members informing them of promotions or reminding them their fees are due and much more. The system also generates a variety of automated communication by email and SMS text message triggered by key events such as funds being transferred into your account, or your POS card being debited.

Contents

E-Mail	130
Newsletter	131
SMS	134

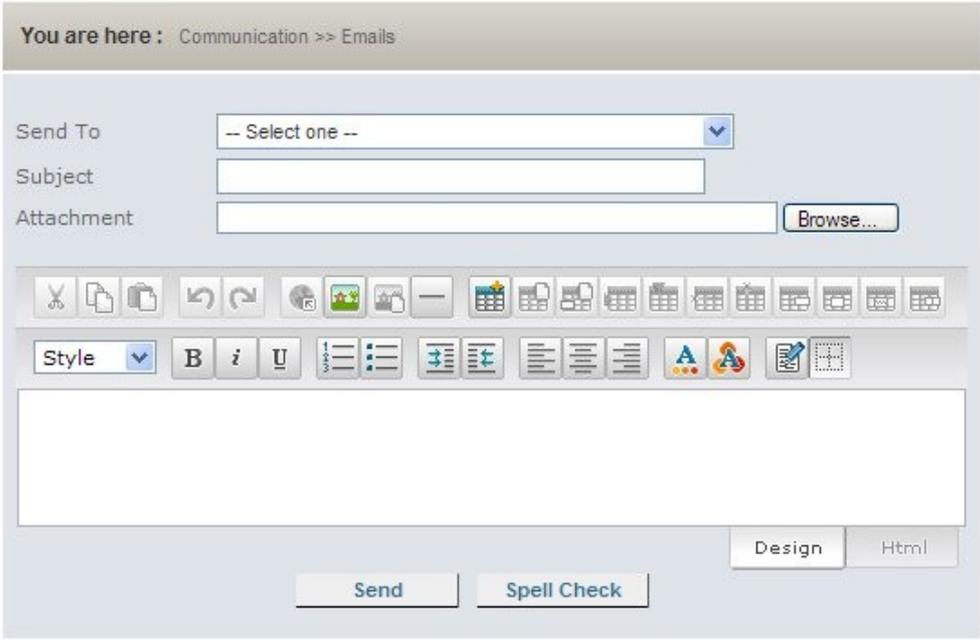
Communication

E-Mail

The E-Mail page lets you easily send emails customers, exchange staff or the software development team at XO Software.

To view E-Mail:

1. To access the E-Mail page click Communication in the main menu and select the E-Mail link. This will load the E-Mail page shown below.



The screenshot shows the E-Mail page interface. At the top, a breadcrumb trail reads "You are here : Communication >> Emails". Below this, there are three input fields: "Send To" with a dropdown menu showing "-- Select one --", "Subject" with a text box, and "Attachment" with a text box and a "Browse..." button. A rich text editor toolbar is visible, containing icons for cut, copy, paste, undo, redo, link, unlink, insert image, insert table, and various text formatting options (bold, italic, underline, bulleted list, numbered list, indent, outdent, text color, background color, link, unlink). Below the toolbar is a large text area for writing the message. At the bottom right, there are buttons for "Design" and "Html". At the bottom center, there are buttons for "Send" and "Spell Check".

To send an E-mail:

1. Select the group you would like to send the email to from the Send To dropdown box. Add a subject and other details.
2. Write the message.
3. Press Send.

Communication

Newsletter

The Newsletter page lets you dynamically create a newsletter that can be sent out to members containing featured products and services and directory listings. The layout can be customized by using the Email Templates feature and sending can be scheduled for anytime you like.

To view Newsletter:

1. To access the Newsletter page click Communication in the main menu and select the Newsletter link. This will load the Newsletter page.

To use the Newsletter function:

1. To create a newsletter, start by typing the number of random products you would like to be displayed on the newsletter and press >. Once the list has loaded you can choose to remove an item, view further details or clear the list and start over.

The screenshot shows the 'You are here : Communication >> Newsletter' breadcrumb. Below it is a blue header 'Add Products to Newsletter'. The main area is divided into two sections. The top section has an input field 'Add random products: 0' with a '>' button to its right. Below this is a large empty box representing the product list. To the right of this box are three buttons: 'Details', 'Remove', and 'Clear'. Below the box is the text 'Random products added : 0'. The bottom section has a dropdown menu with the text 'Your search result is displayed in this list...' and a '>' button to its right. Below the dropdown is a search input field with a 'Search' button. To the right of this box are three buttons: 'Details', 'Remove', and 'Clear'. Below the box is the text 'Specific products added : 0'.

2. You can also choose specific items from the dropdown box or by searching using the available field.
3. Repeat number 1 and 2 for services you would like to include the newsletter.

Communication

Newsletter continued

- To add Directory Listings to the Newsletter type the number of random listings you would like to add and press Add you can choose to remove listings as you want or clear the list and start again.

Add Directory Listings to Newsletter

Add random listings:

Company Names	Listings	
		<input type="button" value="Remove"/> <input type="button" value="Clear"/>

Add specific listings: [Search](#)

Company Names	Listings	
		<input type="button" value="Remove"/> <input type="button" value="Clear"/>

- You can also add a specific listing by selecting search from the 'add specific listings' section.
- Once you have chosen the listings you would like to insert into the newsletter, you can see how the newsletter will look by pressing Preview you can also choose to send it to an email for testing. Remember the layout of the newsletter can be changed in the Email Templates section.

Preview and Test

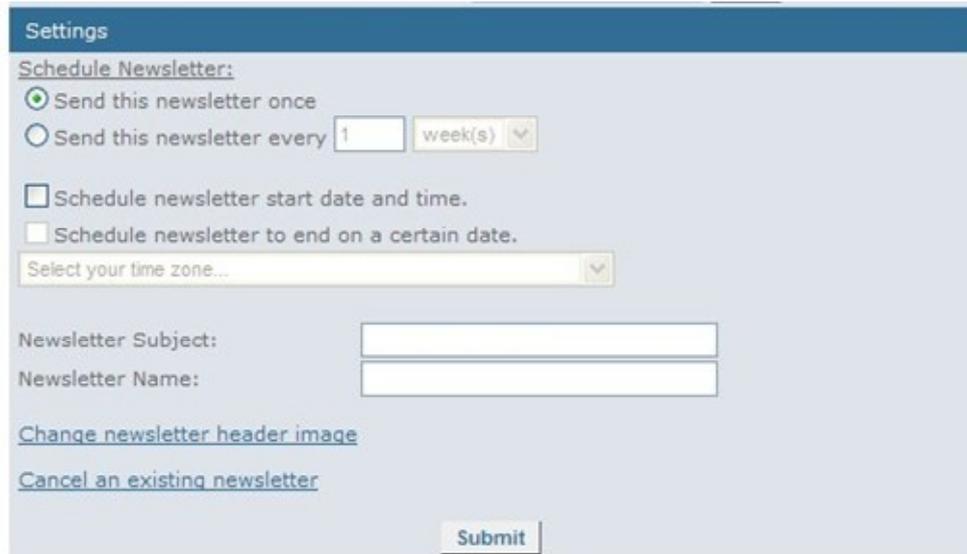
Preview newsletter:

Send a test newsletter to an email address:

- You can now choose when you would like to send the message. You can choose to send it right away, or schedule it to send once a week. You can also define a time period that the message will be sent within.

Communication

Newsletter continued



The screenshot shows a 'Settings' panel for scheduling a newsletter. It includes the following elements:

- Schedule Newsletter:**
 - Send this newsletter once
 - Send this newsletter every
 - Schedule newsletter start date and time.
 - Schedule newsletter to end on a certain date.
 - Select your time zone... (dropdown menu)
- Newsletter Subject:
- Newsletter Name:
- [Change newsletter header image](#)
- [Cancel an existing newsletter](#)
-

8. Enter a subject line and newsletter name in the provided fields.
9. To send, press Submit.

From this page you can also cancel previously scheduled newsletters and change the header image.



NOTE: See the Appendix for an example email newsletter.

Communication

SMS

The SMS page lets you enable or disable the SMS service for your customers. It shows your SMS Account Details and also allows for sending SMS according to many different conditions.

To view SMS:

1. To access the SMS page click Communication in the main menu and select the SMS link. This will load the SMS page.

The screenshot displays the SMS management interface. At the top, it indicates the current location: "You are here : Communication >> SMS". Below this is a link to "View SMS messages sent". The main section is titled "SMS Usage Fees (charged to members)" and contains the following details:

Cash Amount: \$0.20	Barter Amount: \$0.00
Clickatell username: [redacted]	Clickatell password: [redacted]
Clickatell Client ID: [redacted]	Clickatell api_id: 271 [redacted]
SenderID: Ozone	Service Number: 6421 [redacted] 1

Below the details is an "Edit" button. The "Send SMS" section includes the following options:

- To: Specific Number:
- Specific Member: [dropdown menu] [Valid]
- Specific Account Number: [input field]
- Import Phone Numbers from CSV File:
- Members Matching Specific Criteria:
- Specific Staff Member: [dropdown menu] [Valid]
- All Staff Members:
- Staff Members Matching Specific Criteria:

The "Text" field is a large text area. Below it is a checkbox for "Schedule this message to be sent at a later time." At the bottom, there is a "Send" button and a character count: "You have 160 characters remaining".



NOTE: For further information on using the SMS service, please contact your Project Manager.

CHAPTER TWELVE

Directory

Directory allows exchange staff to control
Directory Listing

Contents

Directory Alert Activation.....	136
Directory Listing Print.....	137
Directory Listing Reset.....	138
Edit Alert Message.....	139
View/Hide Categories.....	140

Directory

Directory Alert Activation

Directory Alert Activation lets you activate and de-activate directory alerts. These are seen by a member who has not completed a directory listing when they login to the trading site.

To view Directory Alert Activation:

1. To access the Directory Alert Activation page click Directory in the main menu and select the the Directory Alert Activation link. This will load the the Directory Alert Activation page shown below.

Status of Directory Alert:	Active
Activate Directory Alert:	<input type="button" value="Activate"/>
De-Activate Directory Alert:	<input type="button" value="De-Activate"/>

To set Directory Alert Activation:

1. To activate the Directory Listing Alert press the 'Activate' button, to de-activate press 'De-Activate'.

Directory

Directory Listing Print

Directory Listing Print allows the exchange to produce a Microsoft Word document of directory listings that can be printed and easily modified.

To view Directory Listing Print:

1. To access the Directory Listing Print page click Directory in the main menu and select the the Directory Listing Print link. This will load the the Directory Listing Print page shown below.

You are here :

Purpose: Create a word document of directory listing that can be printed and modified easily.

[Video tutorial on how to create printed directory listing.](#)

[Download Directory Listing XLS data](#)

[Mail Merge Word document](#) Used to Convert the excel data into a paragraphs in word document ready to style

[Directory Listing Template / Example](#)
Used to Add Headers, Footers, Column and Style to the directory listing text.

Upload Completed Directory Listing Word or PDF Document for other exchange administrator (also user in the future) to download

Video Tutorial:

Clicking on the Video Tutorial will load an interactive tutorial guiding you through the steps to making a printable member directory.



NOTE: You will need Microsoft Office Word and Excel to use this feature.



Microsoft
Office Word
2003



Microsoft
Office Excel
2003

Upload Completed Directory:

Once you have finished the tutorial, you can upload a completed member directory in PDF or Word format for members to download.

Directory

Directory Listing Reset

Directory Alert Activation lets you activate and de-activate directory alerts. These are seen by a member who has not completed a directory listing when they login to the trading site.

To view Directory Alert Activation:

1. To access the Directory Alert Activation page click Directory in the main menu and select the the Directory Alert Activation link. This will load the the Directory Alert Activation page shown below.

Status of Directory Alert:	Active
Activate Directory Alert:	Activate
De-Activate Directory Alert:	De-Activate

To set Directory Alert Activation:

1. To activate the Directory Listing Alert press the 'Activate' button, to de-activate press 'De-Activate'.

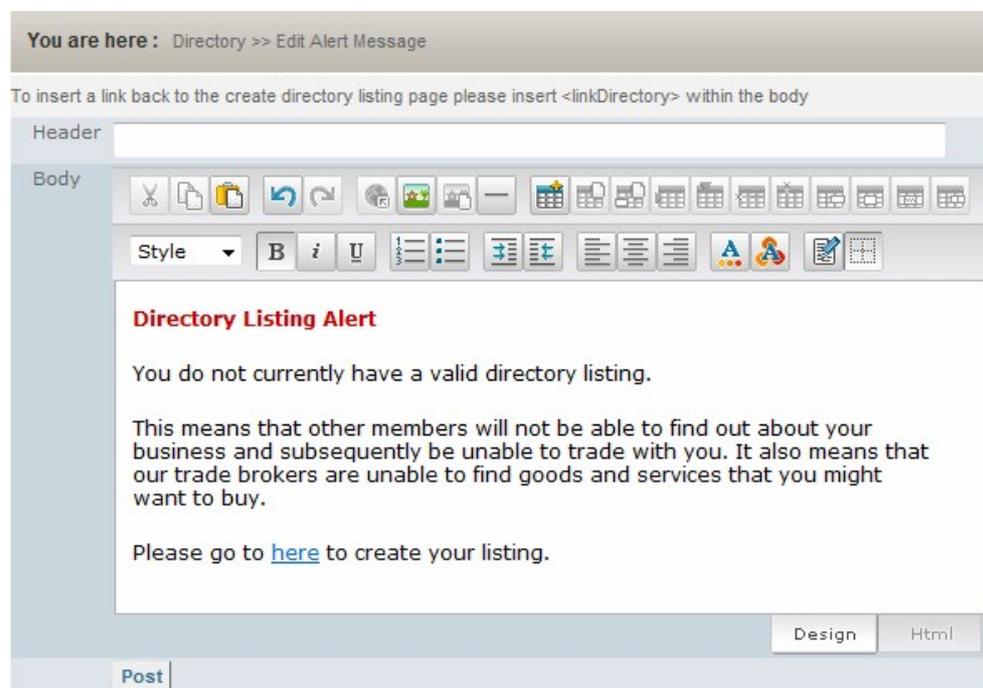
Directory

Edit Alert Message

Edit Alert Message allows you to customise the alert page that is displayed to members if they do not have an active directory listing.

To view Edit Alert Message:

1. To access the Edit Alert Message page click Directory in the main menu and select the the Edit Alert Message link. This will load the the Edit Alert Message page shown below.



The screenshot shows a web editor interface for editing an alert message. At the top, a breadcrumb trail reads "You are here : Directory >> Edit Alert Message". Below this is a text area for the header and a larger text area for the body. The body text area contains the following content:

Directory Listing Alert

You do not currently have a valid directory listing.

This means that other members will not be able to find out about your business and subsequently be unable to trade with you. It also means that our trade brokers are unable to find goods and services that you might want to buy.

Please go to [here](#) to create your listing.

At the bottom of the editor, there are "Design" and "Html" tabs, and a "Post" button.

To edit the Alert Message:

1. To edit the alert message, enter the desired information into the edit box. When finished, press 'Post'.

Directory

View/Hide Categories

From here, you are able to control which Categories are displayed on the front end site.

To view View/Hide Categories:

1. To access the View/Hide Categories page click Directory in the main menu and select the the View/Hide Categories link. This will load the the View/Hide Categories page shown below.

You are here : Directory >> View/Hide Directories

Category Selection

Select Categories:

- All (Selected)
- Accommodation **ACTIVE**
- Automotive **ACTIVE**
- Boats & Marine **EMPTY**
- Broadcasting **ACTIVE**
- Building & Maintenance **ACTIVE**
- Business Services **ACTIVE**
- Real Estate & Property **ACTIVE**
- Security And Safety **ACTIVE**
- Shopping **ACTIVE**
- Sports & Leisure **ACTIVE**
- Storage **ACTIVE**
- Transport **ACTIVE**
- Travel & Tourism **ACTIVE**
- Wedding Arrangements **ACTIVE**

Categories with a * allow items to be added.
An active category contains active products, services or listings which will not be accessible if the category is not selected.

[Update](#)

To View/Hide Categories:

1. To select what categories you wish to view or hide, select the check box next to the category name.

Term	Description
Active	Category contains active products, services or directory listings
Empty	There are no items in this category
Categories with *	Category allows items to be added

CHAPTER THIRTEEN

Content

Our system is highly customizable giving you the opportunity to change all graphics and text for every page of the Trading Site.

You are in complete control of all information you choose to let your members see.

It is important to check that all critical areas of the system are appropriately filled in and display only correct and up-to-date information to your members.

Contents

Content Text	142
Currency.....	153
Direct Debit.....	154
E-Mail Templates	155
IVR E-Mail Templates.....	161
Front End Customisation	162
Front End Images.....	174
Required Contact Details	175
Show Empty Category	176
Statement Settings.....	177
Supplier Settings	179

Content

Content Text

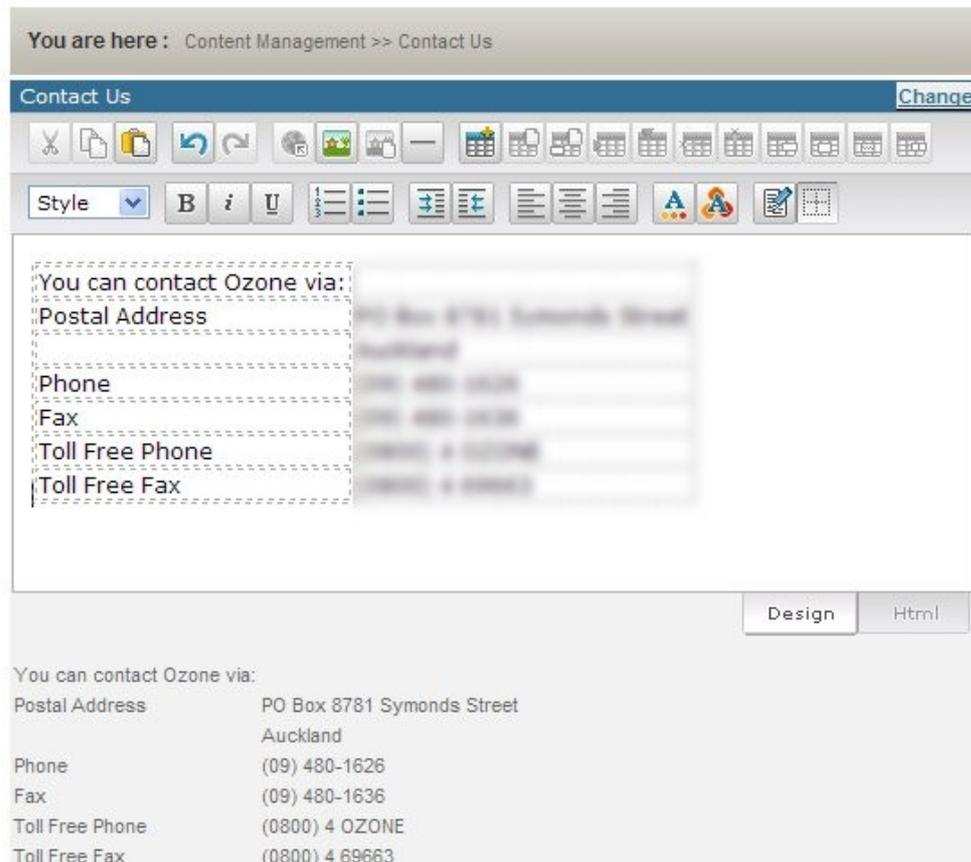
Contact Us

This page is viewable from B2B when you click on the Contact Us link at the top right hand side of the screen. When a member or a potential new member visits the B2B Trading site, they can click on this link to find the contact details for this exchange.

Your contact details are customizable from the backend, and you can change them at any time. For example if you change your phone system or move offices, and you have different numbers for incoming calls, you can update these details. Or if you open a new office in a different area of your country then you can add the details for your new office here.

To view Contact Us:

1. To access the Contact Us page click Content in the main menu and select the Content Text link.



You are here : Content Management >> Contact Us

Contact Us Change

Style **B** *i* U [List Icons] [Align Icons] [Color Icons] [Table Icon]

You can contact Ozone via:

Postal Address	PO Box 8781 Symonds Street Auckland
Phone	(09) 480-1626
Fax	(09) 480-1636
Toll Free Phone	(0800) 4 OZONE
Toll Free Fax	(0800) 4 69663

Design Html

You can contact Ozone via:

Postal Address	PO Box 8781 Symonds Street Auckland
Phone	(09) 480-1626
Fax	(09) 480-1636
Toll Free Phone	(0800) 4 OZONE
Toll Free Fax	(0800) 4 69663

Content

FAQ

FAQ lets you post and edit Frequently Asked Questions. You can use it to answer people's questions and avoid members calling your office.

Members can click a link "FAQ" located at the footer and top right hand corner of every page. When clicked, this link takes the user to a new page with tips you've posted. If you leave this page blank, your members will see a blank page when they click on FAQ. This page is similar to the Help page.

To view FAQ:

1. To access the FAQ page click Content in the main menu and select the Content Text link. This will load the Content Text page. Select FAQ from the list displayed list.

You are here : Content Management > FAQ

Add New FAQ

Title

Description

File

Add New Note: Please type
 at the end of each one paragraph.

Current FAQ

Title:	test
Description:	test
File:	n/a

Content

Welcome Message

Welcome Message lets you design the look and feel of your exchange's front page. Once you've designed it according to your liking, click on the Change button, and you will immediately see it displayed underneath. This page is viewable as the first page B2B.

To view Welcome Message:

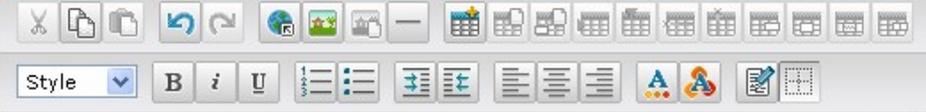
1. To access the Welcome Message page click Content in the main menu and select the Content Text link. This will load the Content Text page.

You are here : Content Management > First Page

Attention:
The Internet banking security and the browser-related problems links are useful and recommend to NOT delete them if you accidentally delete them you can view the default content.

[View Default Content](#) [View Current Content](#)

First Page [Change](#)



Forgotten your username or password?
Email us at passwords@ozonebarter.com with your full company name, account name and contact details (including phone and fax) and we will return your call.

Your Security
If you have questions about Ozone Internet banking security [click here](#).

Other difficulties?
Whether it is related to our web-site, or just a general enquiry you can contact any of our offices world-wide. You a complete list of contact details please go to the main page of www.ozonebarter.com. You can also send an email to info@ozone.net.nz and we will respond to your query within 24

Design Html

Current First Page content:

Forgotten your username or password?
Email us at passwords@ozonebarter.com with your full company name, account name and contact details (including phone and fax) and we will return your call.

Your Security
If you have questions about Ozone Internet banking security [click here](#).

Other difficulties?
Whether it is related to our web-site, or just a general enquiry you can contact any of our offices world-wide. You a complete list of contact details please go to the main page of www.ozonebarter.com. You can also send an email to info@ozone.net.nz and we will respond to your query within 24 hours. If you have browser-related problems viewing our site please [click here](#) for suggestions.

Content

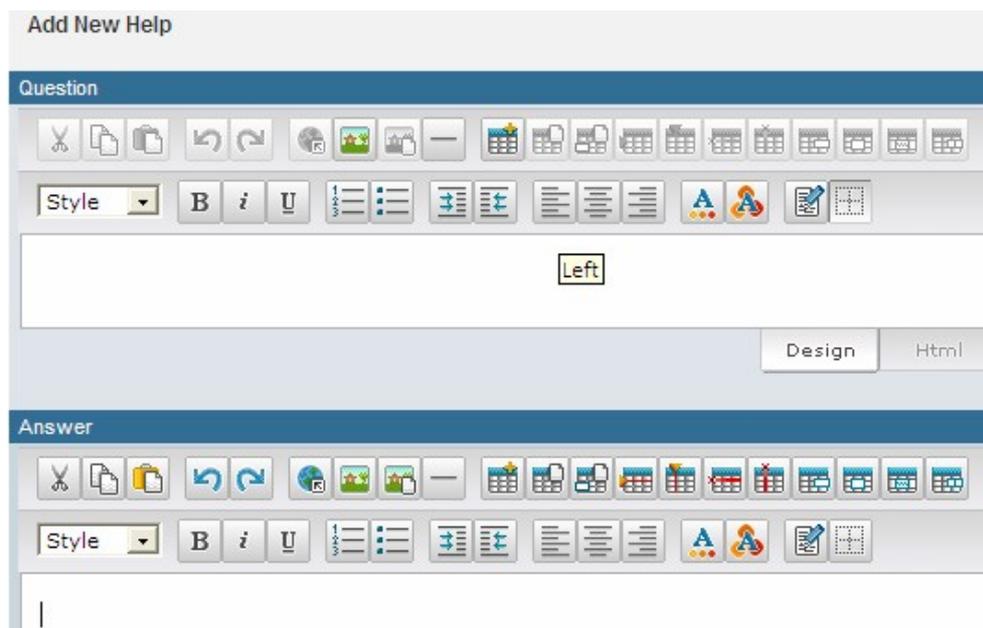
Content Text continued

Help

You can provide help by making it available online at the B2B trading site. The page allows for a simple Question Answer format. Members can click a link “Help” located at the footer and top right hand corner of every page. When clicked, this link takes the user to a new page with tips you’ve posted. To add new help click on the Add New Help button. If you leave it blank, your members will see a blank page when they click on Help.

To view Help:

1. To access the Help page click Content in the main menu and select the Content Text link. This will load the Content Text page. Select Help from the list displayed list.



Content

Content Text continued

Privacy Policy

Your Privacy Policy is displayed on the B2B trading site there is a link “Privacy” located at the footer of every page as well as in emails sent to your members which when clicked takes the user to a new page with Privacy Policy as outlined by the exchange.

This privacy policy is customizable from the backend, and you can change it at any time.

Privacy Policy lets you edit your exchange’s privacy policy. Once you’ve designed it according to your liking, click on the Change button, and you will immediately see what it looks like underneath.

To view Privacy Policy:

1. To access the Privacy Policy page click Content in the main menu and select the Content Text link. This will load the Content Text page. Select Privacy Policy from the list displayed list.

The screenshot shows a web application interface for managing a Privacy Policy. At the top, a breadcrumb trail reads "You are here : Content Management > Private Policy". Below this is a blue header bar with the text "Attachment to Privacy Policy". A file upload section includes a text input field labeled "File", a "Browse..." button, and an "Upload" button. The main content area is titled "Privacy Policy" and features a "Change" button on the right. Below the title is a rich text editor toolbar with various icons for editing, including bold, italic, underline, and list creation. The editor content is as follows:

Introduction

Ozone Barter Limited ("Ozone") requires certain information from its members to enable it to operate the Exchange. This policy sets out the manner in which Ozone will deal with that information. If you have any queries regarding this policy please contact the Director.

Information collected by Ozone

The information regarding Members which Ozone collects in the course of operating the Exchange includes:

- Contact details

At the bottom right of the editor, there are two buttons: "Design" and "Html". Below the editor, a preview of the rendered text is visible, showing the same content as the editor.

Content

Registration Details

This page is designed to be used in conjunction with the B2B Required Contact Details page that we covered earlier under Content Management. It allows the exchange administrator to customize other features in the registration process that are not included in Content Management.

Before your members can register to use the system you must check and ensure that the registration process is setup the way you want it to be and collects all details that you require for a member to join the exchange.

To view Registration Details:

To access the Registration Details page click Content in the main menu and select the Content Text link. This will load the Content Text page. Select Registration Detailed from the list displayed list.

You are here : Exchange >> Edit Registration Details	
Membership Registration Page	
Name:	Registration Form
Type of Tax Details Collected:	VAT
Has business members?	Yes
Overdraft limits:	2000, 3000, 5000, 10000, 20000, 50000, 1500,
Estimated Annual Turnover:	100-1000PLN, 0-100PLN, 5000-10000PLN, 500-10000, 0-500,
Maximum Credit Balance Global Settings	
Activate Maximum Credit Balance:	No
Edit	

Understanding Registration Details:

There are several features we must examine in more detail.

1. Firstly we can change the name of the form you will present to your members when they try and register. Changing this name will change the label displayed on the B2B Trading site when potential new members click on the Register link at the top left hand side of the screen. It could be called "Registration Form" or anything you choose.
2. Secondly, different countries call their Sales TAX different names. This can be changed to VAT, GST, SALES TAX, and TAX. If it is referred to by a different name in your region, please let your Project Manager know and XO Software will add the extra option. Once you

Content

Registration Details continued

3. Select a tax type for your country; it will be displayed under Step 1 where new members enter their general registration information.

The screenshot shows a web interface for editing registration details. At the top, a breadcrumb trail reads "You are here: Exchange Management >> Edit Registration Details". Below this is a blue header bar labeled "Membership Registration Page". The form contains several sections: "Name:" with a text input field containing "Registration Form"; "Type of Tax Details Collected:" with a dropdown menu set to "GST"; "Have Business Members?" with radio buttons for "Yes" (selected) and "No"; "Overdraft limits:" with a text input field, an "Add" button, and a list box containing values 0, 50, 100, and 200; and "Estimated Annual Turnover:" with a text input field, an "Add" button, and a list box containing ranges: "\$1k - \$25k", "\$26k - \$50k", "\$50k - \$100k", and "\$100K - \$1M". At the bottom of the form are "Update" and "Cancel" buttons.

4. The Have Business Members section of this page lets you choose whether to collect business details, or personal details only. It is recommended that you collect business details, and leave this option as YES. If you are running a community currency you might want to choose NO, and only collect personal information for your members. This option also affects the information displayed under Step 1 where new members enter their general registration information as well as many other pages in the system.
5. Overdraft Limits - Your members can apply for an overdraft limit during the registration process. Based on the information you collect from them, such as their Estimated Annual Turnover, Number of Staff, Year the business started trading, Type of business and other checks that you might want to do prior to approving their account, and you can choose to approve any overdraft limit you would like. Approving overdraft limits is done from the backend of the system by an authorized exchange staff member and will be covered later in the exercise section of the training manual

Content

Registration Details continued

Overdraft limits:

75000 Add

3000
5000
10000
20000

Add New Item

X

v

6. You will always be limited to selecting overdraft limits that are currently setup on your system. If for example, \$500 is the only option in the combo box then members will only be allowed to apply for an overdraft limit of \$500 and once their membership is approved the administrator will only be allowed to set their overdraft limit to \$500.
7. It is important to get a flexible range of overdraft limits setup and thereby make it easy to maintain a good balance of credit limits amongst your members. We recommend starting with \$1000, \$2000, \$5000, \$10 000, \$20 000, \$50 000, etc.

You should offer overdraft limits similar to the amount of barter dollars that a member can earn in two months, and include ranges based on the types of businesses you are targeting. For example if you are only targeting small businesses, and you will never have a member turning over \$10,000,000 per annum in cash, then there is no point in setting up an overdraft limit of Trade \$200,000.

8. **Maximum Credit Balance:** Maximum Credit Balance means the maximum final balance a member would like to have.

It gives members / exchange administrators to control how much credit they would like to have after trading.

All the maximum final balances can be defined by exchange administrators from the back end, such as 5000, 8000, 10000 or not activate the maximum final balance for the member so the member has unlimited maximum final balance.

For example, Clear Water Construction Limited has 8000 trade dollars. The company would like to trade maximum 10000 trade dollars. The maximum trade they would like to do is 2000 trade dollars.

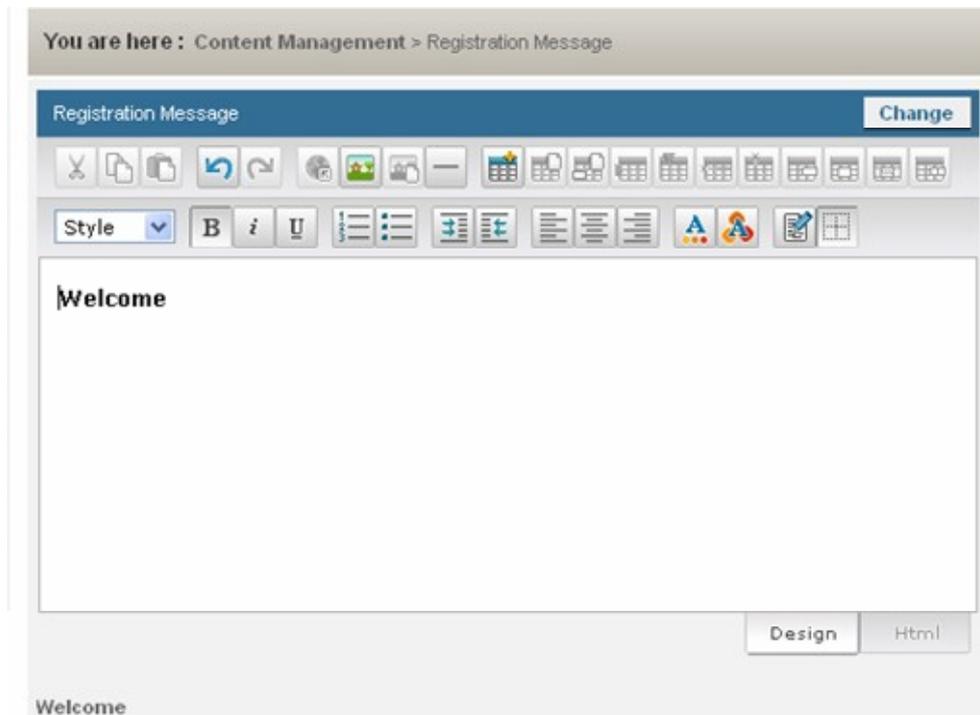
Content

Registration Message

This is the message displayed to members when they click on the Register link at the top left hand side of the page. Here you can list benefits for joining the exchange, as well as a brief explanation of the registration process and any other information you'd like to include. Once a potential member has read the message they can click Continue to proceed to the next page and enter their details.

To view Registration Message:

1. To access the Registration Message page click Content in the main menu and select the Content Text link. This will load the Content Text page. Select Registration Message from the list displayed list.



Content

Currency

The Currency page lets you define the look of monetary values (both Cash and Barter) in your exchange. Once you've entered a currency symbol and delimiter, click on the Apply button. An example will be displayed on the page. These settings will apply to both Front-End and Back-End values.

To view Currency:

1. To access the Currency page click Content in the main menu and select the Currency link. This will load the page shown below.

You are here :

Customise your currency

This page will allow you to customise how your currency will look to your users. It helps you differentiate between cash and your currency.

Customise your cash currency look below:

[Apply](#)

Customise your barter currency look below:

[Apply](#)

This is how your cash currency will look: \$10.00

This is how your barter currency will look: \$10.00

Content

Direct Debit

This feature allows an exchange to upload a direct debit form to the B2B Trading website. Once you've uploaded the direct debit form as a PDF file, members can download and print this form.

They can then fill in all their details, such as their bank account number, address, etc, and sign the form as acceptance that you may debit their account for the cash fees they incur. Members should hand the form over to the exchange directly, or post it back. Once it is processed the exchange can call the member, or post a confirmation letter back, confirming that the direct debit form has been received and will be applied to their account every month on a set date.

This form is only available to members. To download a copy you must login to the B2B Trading website with their username and password. Click on Online Banking → Fees Owing, and then click on manage Auto - Payments Details. This will take the member to a new page where they can either register a credit card, or download the direct debit form.

This form can be made available for pickup from your local exchange office.

To view Direct Debit:

1. To access the Direct Debit page click Content Management in the main menu and select the Direct Debit link. This will load the Direct Debit page shown below.

You are here : Content Management > Direct Debit Form Uploader

Existing Direct Debit Form
[Download from here](#)

Add New Direct Debit Form
Images must be ".pdf" files and adhere to the pixel dimensions described below.

File

Content

E-Mail Templates

Email Templates are used to customize the look and feel of automatically generated email messages your members will receive as they make use of the various features made available to them on the B2B Trading site.

It is important to make sure that these email messages reflect the image your exchange is aiming to represent. After modifying any of these email templates, you should always send yourself a test email to ensure you haven't accidentally deleted any dynamically generated fields.

To view E-Mail Templates:

1. To access the E-Mail Templates page click Content in the main menu and select the E-Mail Templates link. This will load the E-Mail Templates page shown below.

The screenshot shows the 'E-Mail Templates' editor interface. At the top, a breadcrumb trail reads 'You are here : Content >> Email Templates'. A link for 'Upload Email Images' is visible in the top right. The main form has a 'Type' dropdown set to 'EFTPOS Card Order Confirmation' and a 'Subject' field containing 'EFTPOS Card Order Confirmation'. Below these is a 'Content' area with a rich text editor toolbar. The editor contains the text 'Sincerely yours,' followed by a dynamic field '<<ExchangeName>>'. At the bottom of the editor, a footer reads 'Software provided by XO Limited - www.barter-software.com'. Below the editor are 'Design' and 'Html' tabs. At the very bottom, there are 'Confirm' and 'Cancel' buttons, and a note: 'Insert e-mail address below and click SEND to submit and view selected e-mail template at address inserted.'

Content

E-Mail Templates - Description

The following is a list of all email templates you are able to modify. These messages will be sent to your members through normal use of the B2B Trading site and services provided by your exchange. Feel free to look through each email template and get a better idea of the exact details for each.

POS Card Order Confirmation

When a member orders an POS card, an email gets sent to them confirming that their request has been processed and giving them their POS card number.

POS Card Pin Reminder

When a member clicks on the FORGOTTEN PIN button for their POS card, this email gets sent to them with their pin number.

POS Card Transaction

When a member's card is debited, the system sends the member an Email with the Transaction Record.

Email Footer

The footer that gets applied to every email going out of the system

Email Header

The header that gets applied to every single email that goes out of the system

Internal Email

The template for emails sent to the XO Software Development Team

Item Question

The email sent to the member that has a current listing, when a question is asked for their product/service listed online

Item Response

This is the email that gets sent through the system when a member is asked a question, and logs into the website to answer this question through the system.

Members Trading Report

This is the template that gets sent when a broker generates a member trading report and clicks the EMAIL button to email it to a specific member.

Content

E-mail Templates - Description continued

Newsletter

The main part of the newsletter, like welcome message, this is editorial part of the newsletter, which stay until you changed it. In this part you can upload pictures and images.

Online Order Cancellation/Buyer/Exchange Administrator

When a member makes a purchase for a product/service online, the system debits their account and holds it in an escrow account. It then sends an email to the Seller, asking them to COMPLETE the transaction, or CANCEL it. This email gets sent if the SELLER clicks the Cancel button, rejecting the offer to buy the advertised product, and returning the FUNDS back to the Buyer, thereby emptying the escrow account.

Online Order Confirmation

When a member makes a purchase for a product/service online, the system debits their account and holds it in an escrow account. It then sends an email to the Seller, asking them to COMPLETE the transaction, or CANCEL it. If the SELLER confirms the Sale of their product or service by clicking on the COMPLETE button the funds are transferred from the escrow account into their account. An Online Order Confirmation is sent to the Buyer

Online Order Confirmation Buyer/Exchange Administrator

Order canceled online by the buyer, exchange administrator, seller.

Online Order Complaint Buyer

Email sent to the buyer if the seller has made a complaint against them during an Online Order.

Online Order Complaint Seller

Email sent to the seller if the buyer has made a complaint against them during an Online Order.

Online Order Confirmation/Buyer/Exchange Administrator

Online order confirmed by the seller/buyer/exchange administrator.

Online Order Email

Whenever a member buys a product or service the following email goes out to both parties informing them of the details of the transaction issued.

Online Order Quote Accepted

In some cases members will price a SERVICE as zero dollars or require a quote. When a member buys this type of item the seller must IN ADDITION to ACCEPTING the offer, ENTER AN Amount for this offer. ANOTHER EMAIL is sent out to the BUYER with the AMOUNT that the

Content

E-mail Templates - Description continued

seller quoted. The buyer now has the option to ACCEPT THIS OFFER. They must click on the link from that email, or go to their Order History from B2B, and ACCEPT THE QUOTE. If they ACCEPT the quote, THIS EMAIL “Online Order Quote Accepted” gets send to the SELLER confirming that the buyer has accepted their quote and are happy to proceed.

Online Order Quote Set

In some cases members will price a SERVICE as (“0”) or QUOTE REQUIRED. When a member buys this type of item the seller must IN ADDITION to ACCEPTING the offer, ENTER AN Amount for this offer. AN EMAIL is sent out to the BUYER informing them that a quote is available for them to view. This is the “Online Order Quote Set” email.

Online Transfer Email

When funds are transferred online between 2 members using the CREDIT ANOTHER ACCOUNT function from B2B this email gets sent to both parties.

Password Reminder

Under Member Account Details, from the backend, there is an option to SEND PASSWORD REMINDER. This email controls the way that password reminder works

Password Update Email

This email gets sent to the member when they update their password from the B2B site

Pay Anyone Accepted, Notification to Recipient

Email sent when a member accepts a Pay Anyone Payment. Notification that funds are able to be used.

Pay Anyone Accepted, Notification to Sender

Email sent when a member makes a Pay Anyone Payment. Notification that funds have been transferred from their account.

Pay Anyone Awaiting Acceptance, Notification to Recipient

Email sent to member being paid when another member makes a Pay Anyone Payment. Notification that funds have been transferred and ready to be accepted.

Pay Anyone Expired, Notification to Recipient

Email sent to the Recipient of a Pay Anyone transaction if it expires.

Content

E-mail Templates - Description continued

Pay Anyone Expired, Notification to Sender

Email sent to the Sender of a Pay Anyone transaction if it expires.

Pay Anyone Rejected, Notification to Recipient

Email sent to the Recipient of a Pay Anyone transaction if they have rejected a transaction.

Pay Anyone Rejected, Notification to Sender

Email sent to the Recipient of a Pay Anyone transaction if it is rejected by the recipient.

Pay Anyone Reversed, Notification to Recipient

Email sent to the Recipient of a Pay Anyone transaction if it is reversed.

Pay Anyone Reversed, Notification to Sender

Email sent to the sender of a Pay Anyone transaction if it is reversed.

Pay Anyone Sent, Notification to Recipient

This template informs that Recipient received from Seller some amount of money.

Pay Anyone Sent, Notification to Sender

This template informs that Sender have paid to Recipient.

Referral Email**Registration Email**

This email gets sent to all users that have just completed registration, giving them their username and password, and letting them know the exchange will be in touch with them.

SMS Transfer Email

This email gets sent every time a transaction has happened over SMS. It is sent to both parties.

Suggestion Email

Any suggestions from to.....

Trading Report

This is the template that is used when sending a trading report to a member via email. You send these under Search Members on the main menu.

Content

E-mail Templates - Description continued

Transaction Record Email (Buyer)

In the backend under Transactions, once a particular transaction is open, the Administrator can email this transaction. This is the email that goes out to the BUYER party informing them of the details for this transaction, provided that the Administrator click on the EMAIL BUTTON

Transaction Record Email (Seller)

In the backend under Transactions, once a particular transaction is open, the Administrator can email this transaction. This is the email that goes out to Seller party informing them of the details for this transaction, provided that the Administrator click on the EMAIL BUTTON

Transaction Record Email (Both)

In the backend under Transactions, once a particular transaction is open, the Administrator can email this transaction. This is the email that goes out to BOTH parties informing them of the details for this transaction, provided that the Administrator click on the EMAIL BUTTON

Transactions record email (User Specified)

Welcome Email

A Welcome Email can be emailed to members once their Account is approved. Click on Send Welcome E-Mail button to send this email.

Content

IVR E-Mail Templates

IVR Email Templates is used to customize the look and feel of automatically generated email messages your members will receive when they make transactions over the IVR telephone banking service (if enabled).

It is important to make sure that these email messages reflect the image your exchange is aiming to represent. After modifying any of these email templates, you should always send yourself a test email to ensure you haven't accidentally deleted any dynamically generated fields.

To view IVR E-Mail Templates:

1. To access the E-Mail Templates page click Content in the main menu and select the IVR E-Mail Templates link. This will load the IVR E-Mail Templates page shown below.

The screenshot shows a web-based interface for editing email templates. At the top, a breadcrumb trail reads "You are here : Content >> Email Templates". A link for "Upload Email Images" is visible in the top right. The main form has a "Type" dropdown set to "EFTPOS Card Order Confirmation" and a "Subject" field containing "EFTPOS Card Order Confirmation". Below this is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, and table. The editor's content area shows the text "Sincerely yours," followed by a placeholder field "<<ExchangeName>>". At the bottom of the editor, a footer reads "Software provided by XO Limited - www.barter-software.com". Below the editor are "Design" and "Html" tabs. At the bottom of the form are "Confirm" and "Cancel" buttons. A final instruction at the very bottom states: "Insert e-mail address below and click SEND to submit and view selected e-mail template at address inserted."

Content

Front End Customisation

The Front End Customisation page is used to customize the look and feel of the front end of your exchange. From here you can upload images, and choose different layout options to suit you and help your members trade more efficiently.

The purpose of this feature is to introduce more design flexibility for the front-end user interface. To use the interface, click on the link above the section you would like to modify. These sections are detailed below.

To view Front End Customisation:

1. To access the Front End Customisation page click Content in the main menu and select the Front End Customisation link. This will load the Front End Customisation page shown below.

Select the part of the frontend you want to customize:

OZONE New Zealand **Main Menu Panel** [Home](#) [About Us](#) [Online Bookings](#) [My Profile](#)

Sell Your Products & Services Online with OzoneCard
Main Menu Opening Image

1 Register online for FREE. Registerable users will be able to sell through us. You are OZONER charged to sell if you are in need with the website.
 2 Receive and reply to online enquiries. Approve bookings, negotiate prices and sell.
 3 Receive payments, including. Other members will pay you with their credit.

Search **Search Panel** My Exchange My Region

[Advanced Search](#) [Search Tips](#)

Search Opening Image

1 Receive an instant credit limit. Once registered you will receive an instant credit limit so you can buy from other local businesses.
 2 List your products & services. This will allow people to place orders/bookings with you or ask for quotes online.
 3 Local members are just one click away from local funds in their OzoneCard account.
 4 Spend your funds. Buy from other businesses through our website both nationally and internationally.

Username Password **Login Panel** Keep me logged in **Registration Panel** **Bookmark Panel**

Browse by Category

All Categories >

Accommodation (57)	Food & Drink (63)
Automotive (125)	Health & Beauty (142)
Boats & Marine (14)	Home & Garden (165)
Broadcasting (9)	Industrial (42)
Building & Maintenance (135)	Other (30)
Business Services (416)	Real Estate & Property (22)
Children (8)	Travel & Safety (13)
Clothing & Fabric (71)	Shopping (64)
Community (17)	Sports & Leisure (46)
Computers (117)	Storage (1)
Education & Training (16)	Transport (8)
Electronics (61)	Travel & Tourism (28)
Entertainment (52)	Wedding Arrangements (25)
Finance (4)	

Category Panel

Our categories are designed to your needs: [click to increase offers!](#)

Browse By **New Listing, Statistics, Browse-by Panel**

Resources

Welcome [FAQ](#) [Help](#)

NEW VISITORS!
 If you would like to find out about Ozone and how it could benefit your business, please [click our online presentation here.](#)

Trade Broking: [1 \(0800\) 000 000](#)

Side Panel

Handba... Handba... Seiko Sm...
 Handba... Handba... Payer/B...

Footer Links Panel

[Home](#) [About Us](#) [Privacy](#) [Terms](#) [FAQ](#) [Contact Us](#)

Content

Main Menu Panel

There are two layout options available for the front end main menu. The main menu is the top part of the screen with the main navigational links

Option One:

Exchange Logo on the left and navigation buttons on the right.



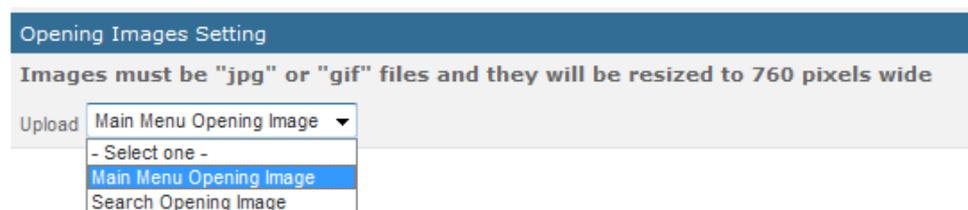
Option Two:

Exchange Logo on the left with navigation buttons in a row underneath.



Main Menu Opening Image

Main Menu Opening Image gives you the option to add an image directly below the main menu. Clicking on the Main Menu Opening Image link will take you to the Opening Images Settings page. To upload an image select Main Menu Opening Image from the drop down box.



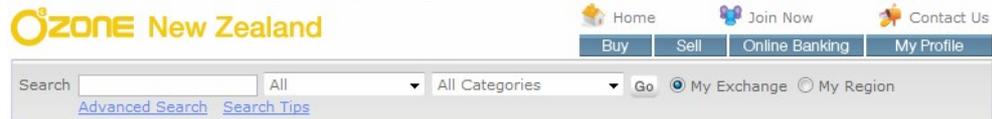
You are able to upload an image for both before and after login. Browse for the image and press 'Upload'. For the image to show on the front end, make sure that you have ticked 'Show Image?'.



Content

Main Menu Opening Image continued

Front End without Opening Image:



Front End with Opening Image:

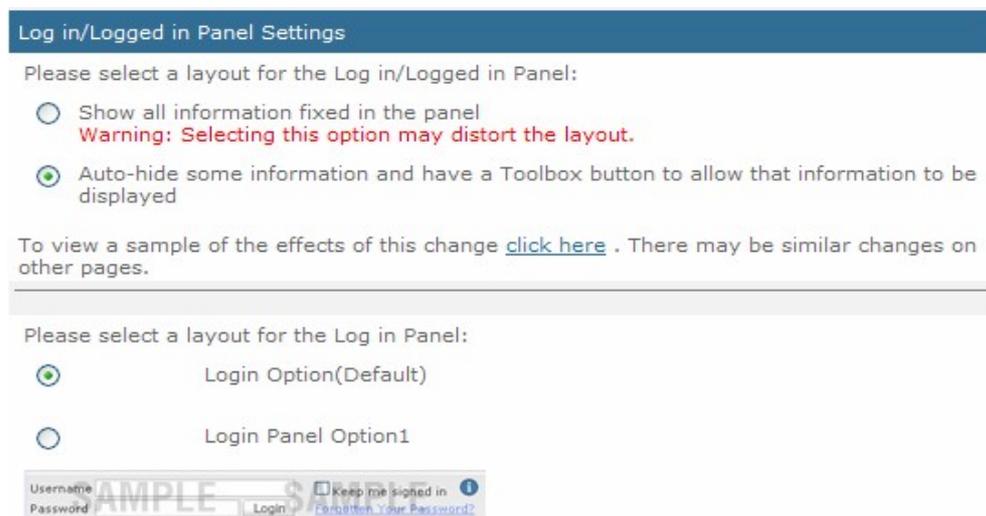


Search Panel Opening Image

Search Panel Opening Image operates in a similar way that the Main Menu Opening Image does. This setting gives you the option to add an image directly below the search panel. Clicking on the Search Panel Opening Image link will take you to the Search Panel Settings page. To upload an image select Search Panel Opening Image from the drop down box. Screenshots for this can be seen under Main Menu Opening Image.

Login Panel

Login Panel controls the appearance of the panel before and after login.



Content

Login Panel continued

Logged-in Panel Settings

Show All Information:

Selecting Show All Information will show useful customer information on the panel after login.

Logged in as: ozone Trading As: OzoneCard New Zealand Account Balance: \$72.88	Merchant Advisor: Rimoni Leota Email: rimoni.leota@ozonecard.com Phone: 092747122 Log Out	Pay Someone Debit a Card Send Ozonecard money to ANYONE
--	--	---

Auto-hide Some Information:

Selecting Auto-hide Some Information will compress information into a button that will display information when a user hovers over it with their cursor. This setting is useful when space for text may be limited by translation or other graphics.

Logged in as: ozone Trading As: Ozone	Account Balance: \$72.88 More Log Out Merchant Advisor: Rimoni Leota Email: rimoni.leota@ozonecard.com Phone: 092747122	Pay Someone Debit a Card Send Ozonecard money to ANYONE
--	---	---

Log-in Panel Settings

Option One:

Login Panel Option One displays the username and password input fields on the left and the login button and options to the close right.

Username <input type="text"/> Password <input type="password"/>	<input type="checkbox"/> Keep me signed in i <input type="button" value="Login"/> Forgotten Your Password?	Not currently a Merchant? <input type="button" value="Join Today"/>	<input type="button" value="Toolbox"/>
--	---	--	--

Option Two:

Login Panel Option Two displays the username and password input fields and the login button on the left and login options directly underneath.

Username <input type="text"/> Password <input type="password"/>	<input type="button" value="Login"/>	Not currently a Merchant? <input type="button" value="Join Today"/>	<input type="button" value="Toolbox"/>
<input type="checkbox"/> Keep me signed in i Forgotten Your Password?			

Content

Registration Panel

The Registration Panel allows you to change how the member registration part of the login panel looks. You can choose to have the default button and text or define your own image and assign a hyperlink. When you've made your changes, press 'Save Changes'.

Button and Text:

This is the default option. It displays translatable text and the customizable image.

Image that links to registration page:

This option allows you to use your own image which links to the B2B registration page.

Image that links to specific page:

This option allows you to use your own image which links to a page of your choice.



TIP: To customize the image that is displayed go to Content → Front End Images and modify the 'registrationlogo.gif'.

Content

Bookmark Panel

The Bookmark Panel changes the appearance of the right most section of the front end main menu. There are four options available.

Toolbox Button:

This is the default option. When a user hovers over the image, a box is displayed with the 'email' and bookmark this page links.



Image Panel:

This will allow you to upload your own image to replace the end of the panel.



To upload an image, select Browse to find your image then press the 'Update' button.



Bookmark Panel:

This allows you to show the 'Email' and 'Bookmark this page' links without the drop down box.



You can choose which of the links that you wish to display by selecting them from the portion that is shown below.



Don't show anything:

As it says, selecting this will not display the Bookmark Panel.

Content

Category Panel

The Category Panel page allows you to change where the category panel is placed on the front end. There are three options available.

Category Panel Settings

Please select a layout you want to show on login page browse panel before login:

- Category Panel
- Category Products Panel
- Image Panel

Category Panel:

This is the default option. This option makes the categories the central element of the front end.

The screenshot shows the 'Browse by Category' panel on the left, listing various categories with their respective counts. The 'Resources' panel on the right includes a 'Welcome' message, a 'FAQ' button, and a 'Help' button. Below the resources is a 'Featured Products' section displaying several product images with their names and 'Scalextr..' labels.

Browse by Category		Resources	
All Categories >		Welcome FAQ Help	
Accommodation (13)	Food & Drink (40)	Welcome to OzoneCard New Zealand	
Automotive (5)	Funeral Arrangements (0)	If you need more information you can contact us at 0800 OzoneCD or visit our website at www.ozonecard.com . You can (more...)	
Boats & Marine (0)	Health & Beauty (11)	Featured Products	
Broadcasting (8)	Home & Garden (26)		
Building & Maintenance (74)	Industrial (4)		
Business Services (103)	Jewellery & Watches (0)		
Children (1)	Other (9)		
Clothing & Fabric (3)	Real Estate & Property (22)		
Community (2)	Security And Safety (7)		
Computers (77)	Shopping (21)		
Education & Training (7)	Sports & Leisure (6)		
Electronics (10)	Storage (4)		
Entertainment (17)	Transport (1)		
Farming (10)	Travel & Tourism (2)		
Finance (15)	Wedding Arrangements (4)		
Our Categories are designed to your Needs. Help us improve them!			

Category Products Panel:

Setting the panel to Category Products will display the category panel to the left hand side and make Featured Products the focus of the front end.

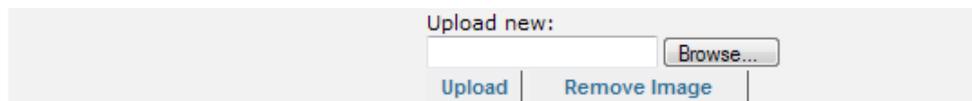
The screenshot shows the 'Browse by Category' panel on the left, listing various categories with their respective counts. The 'Featured Products' panel on the right displays several product images with their names and 'Scalextr..' labels. The 'Resources' panel on the right includes a 'Welcome' message, a 'FAQ' button, and a 'Help' button.

Browse by Category		Featured Products		Resources	
Accommodation (13)	Automotive (5)			Welcome FAQ Help	
Boats & Marine (0)	Broadcasting (8)			Welcome to OzoneCard New Zealand	
Building & Maintenance (74)	Business Services (103)			If you need more information you can contact us at 0800 OzoneCD or visit our website at www.ozonecard.com . You can (more...)	
Children (1)	Clothing & Fabric (3)			Featured Products	
Community (2)	Computers (77)				
Education & Training (7)	Electronics (10)				
Entertainment (17)	Farming (10)				
Finance (15)	Food & Drink (40)				
Funeral Arrangements (0)	Health & Beauty (11)				

Content

Category Panel continued

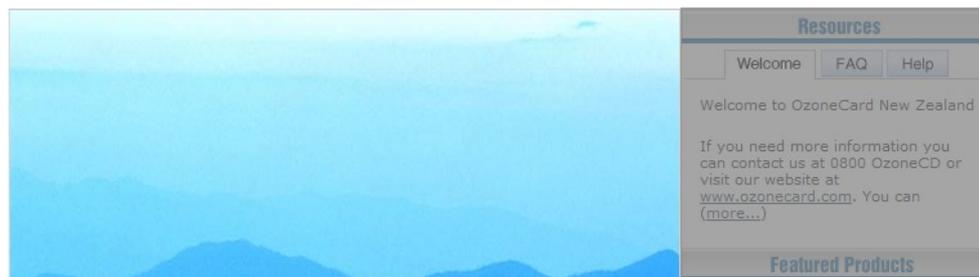
You can also define your own background image to be used behind the category panel. To add a background image, select 'Browse' to locate your image then press 'Upload' to apply the image. If you wish to remove it then press 'Remove Image'.



 **NOTE:** For some browsers, you may need to force refresh to view the newly uploaded image. This can be done by pressing Ctrl + F5 on your keyboard.

Image Panel:

Setting the panel to Image Panel will remove the categories list and instead display an image of your choice. This will become the main focus of your page.



To upload an image, press 'Browse' to locate it and then press the 'Upload' button.

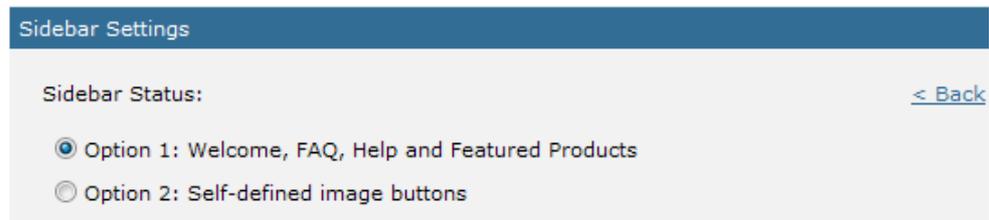


 **TIP:** Images uploaded under Image Panel will be resized to 519 pixels wide. To ensure the best quality, make sure that your image is this size.

Content

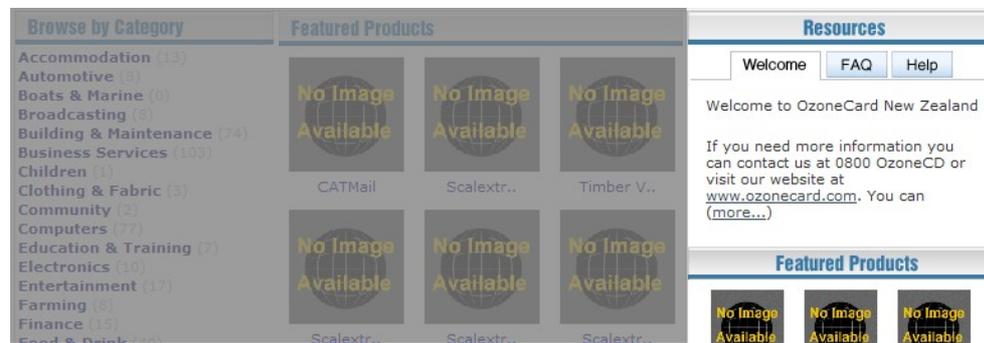
Side Panel

The Side Panel page allows you to change what is shown on the left of the front end. There are two options available.



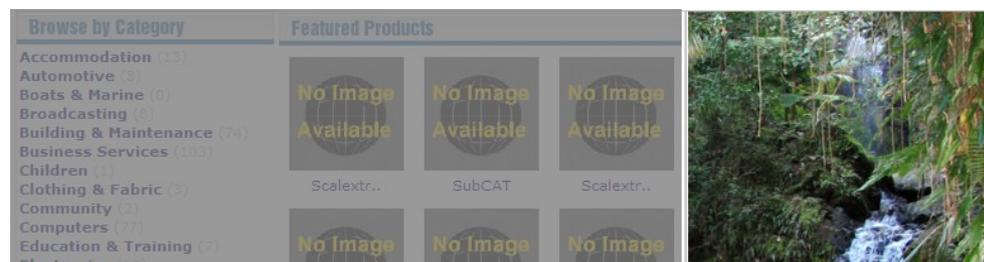
Option One:

This is the default option. This will display the Welcome, FAQ and Help tabs plus display a panel of featured products.



Option Two:

This allows you to use the panel to display an image or images. This can be used to present advertising, current promotions or important announcements.



You can add as many images as you like to the side panel. You also have the option of adding your own hyperlink to the image to link to outside advertisers or services.

To add a new item to the panel click on the 'Add New Item' link.

Content

Side Panel continued

Sidebar Items:

Enabled	Image	Link	
<input checked="" type="checkbox"/>		none	Edit

[Add new item](#)

Select the image you would like to upload by selecting the 'Browse' button. Next select whether you would like to enable or disable the image. You can also define an on-click action to the image, by either entering your own address or by selecting one of the radio button options.

Sidebar Item

Create new sidebar item:

Image Upload	<input type="text"/> <input type="button" value="Browse..."/> Select the image you want to upload.
Status	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Hyperlink	<input checked="" type="radio"/> No hyperlink <input type="radio"/> Email this page <input type="radio"/> Bookmark this page <input type="radio"/> Specific link (enter below) <input type="text"/> <input type="checkbox"/> Open link in new window

Once you are finished press 'Add Item' to apply the image.

Content

New Listings, Statistics and Browse-by Panel

This section allows the exchange to select which of these panels should be visible on the front end.

New Listings, Statistics and Browse-by Panel settings

New Listings section will be displayed on the homepage:

Yes No

Statistics section will be displayed on the homepage:

Yes No

Browse-By section will be displayed on the homepage:

Yes No

New Listings Panel:

This panel is a showcase of new listings that have been added to the site.

Statistics Panel:

This panel displays information about the exchanges current trading and membership. This includes New Members, Last Logged In members, Wanted Items, Transaction Volumes and Local Market Value.

Browse-by Panel:

The Browse-by Panel contains convenient links to other areas of the B2B trading site.

New Listings

[View All New Listings](#)

Fluid Handling Solutions

Fluid Handling Solutions are a wholesale...
[more](#)

Wicked Industries

Retail, sports apparel, Hats and Caps...
[more](#)

Earthsong Enterprises

Do you like to be a little different fr...
[more](#)

Enzo's Excavations

We are a Family owned and operated Bobca...
[more](#)



ADscene Promotions...
[more](#)



Babeez On The Go...
[more](#)

Statistics

New Members	Last Logged In	Wanted Items	Transaction Volumes	Local Market Value
This week: 0 Last week: 0 Year: 20 Total Merchants: 1089	Australasian Trading... Enzo's Excavations Eunica Pty Ltd Earthsong Enterprise... ADscene Promotions	accomodation dexion racking norway thailand	Today: \$0.00 Yesterday: \$0.00 This week: \$0.00 This month: \$0.00	Products: \$973620.50 Services: \$21943800.00

Browse By

[Categories](#) - [Featured Listings](#) - [New Listings](#) - [All Listings](#) - [Customers Wanted](#)

Content

Footer Links Panel

Footer Links Panel options allow you to control how the lowest panel of the front end interface is displayed.

Show Footer Links:

This is the default option. It will display a row of links at the bottom of the page linking to specific pages. These include: Home, Help, Privacy Policy, Terms & Conditions, FAQ and Contact Us.

[Home](#) - [Help](#) - [Privacy Policy](#) - [Terms and Conditions](#) - [FAQ](#) - [Contact Us](#)

Footer Image:

You can also upload a footer image to display instead of the links. You are able to upload both a foreground and background image. To upload an image press 'Edit'.

Content

Front End Images

The Front End Images page allows you to completely change the look and feel of your exchange user interface. It is critical that you make sure all images on your website display correctly.

This process is very similar to skinning an application. All images uploaded on the website must be the same size as the ones provided originally. Your Project Manager can help you with any problems and image specifications for each image are included in your Project Plan.

To view Front End Images:

1. To access the Front End Images page click Content in the main menu and select the Front End Images link. This will load the Images page. This page is displayed below.

The screenshot shows a web interface for managing front-end images. At the top, a breadcrumb trail reads "You are here : Content Management > Interface Customization Front-End". Below this is a table with the following columns: Image Name, Image Preview, and Action. The table lists various images used in the user interface, such as navigation buttons and titles, each with an "Edit" link.

Interface Images		
delist_dn.gif		Edit
delist_up.gif		Edit
editListings_dn.gif		Edit
editlistings_up.gif		Edit
footer.gif		Edit
header.gif		Edit
headerLogo.gif		Edit
helpicon.gif		Edit
largeTitleDirectory.gif		Edit
largeTitleAccountDetails.gif		Edit
largeTitleAccountManager.gif		Edit
largeTitleBrowse.gif		Edit
largeTitleMyaccount.gif		Edit
largeTitleMyFavs.gif		Edit

Content

Required Contact Details

This page allows you to customize what information is required for New Member Registration and for the creation of Directory Listings.

It is important to know you can customize this section. It comes with a default configuration but you are free to change it at any time. The fields displayed on forms affected by these settings can either be present or required. If fields are only set to Present, then it is optional whether members fill these fields or not. If fields are also set to required then a user will be required to fill in that field before they can submit the form they are filling in.

To view Required Contact Details:

- To access the Required Contact Details page click Content in the main menu and select the the Required Contact Details link. This will load the the Required Contact Details page shown below.

Contact Details		
Present	Required	Field
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Toll Free Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Toll Free Fax
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobile

Web Details		
Present	Required	Field
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Website
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email - at the moment, always required

Address Details		
Present	Required	Field
<input type="checkbox"/>	<input type="checkbox"/>	prefix - e.g. PO Box, Unit number etc.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Building
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Street
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Suburb
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	City
<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Region <input checked="" type="radio"/> State <input type="radio"/> Province <input type="radio"/> Other
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Country

Postal Address Details		
Present	Required	Field
<input type="checkbox"/>	<input type="checkbox"/>	Prefix - e.g. PO Box, Unit number etc.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Building
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Street
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Suburb
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	City
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Region / State / Province / Other - based on the selection above
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Country
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Post Code <input checked="" type="radio"/> Zip Code <input type="radio"/> Other

[Update](#)

Content

Show Empty Category

The Show Empty Category Page allows the exchange to choose whether categories on the front end with no products, services or listings on them should be displayed to members.

To view Show Empty Category:

1. To access the Show Empty Category page click Content in the main menu and select the Show Empty Category link. This will load the Show Empty Category page. This page is displayed below.

To modify the setting:

1. Select whether you want to show or hide the empty categories and click 'Update'.



Show Empty Categories? Yes No

[Update](#)

Content

Statement Settings

The Statement Settings page allows the exchange to modify settings that can place restriction on how salespeople view member statements. From here you can also change the number of days after a statement is issued that the amount is due.

To view Statement Settings:

1. To access the Statement Settings page click Content in the main menu and select the Statement Settings link. This will load the Statement Settings page.

To apply statement restrictions:

1. This section allows the exchange to set who account statements are managed by. This can be done by selecting the 'Edit' button under the Statement Management heading.

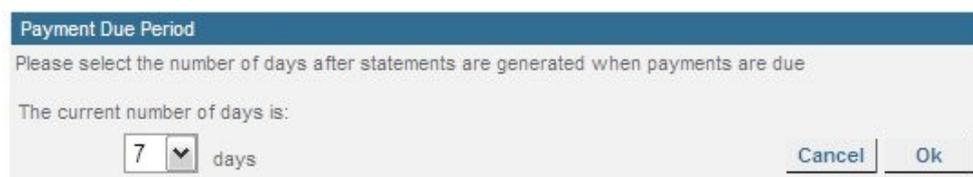


The screenshot shows a dialog box titled "Statement Management". The text inside reads: "Please select the person(s) to manage all user statements". Below this, it says "Statements are currently managed by:". There are two radio button options: "Sales person of each individual account" (which is selected) and "One single appointed sales person". Below the second option is a dropdown menu. At the bottom right of the dialog are "Cancel" and "Ok" buttons.

2. You can choose to have statements managed by either the individual salesperson for a specific member, or you can appoint one person.
3. To use the sales person of the individual account, select 'Sales person of each individual account'. Alternatively, you can choose one sales person from the dropdown list.
4. To confirm any changes make, press the 'OK' button.

To set the payment due period:

1. This option lets you change the number that notifies the member of the days until the owing amount on the statement is due. This is usually 7 days, however can be set from 1 to 31 days.



The screenshot shows a dialog box titled "Payment Due Period". The text inside reads: "Please select the number of days after statements are generated when payments are due". Below this, it says "The current number of days is:". There is a text input field containing the number "7" and a dropdown arrow, followed by the word "days". At the bottom right of the dialog are "Cancel" and "Ok" buttons.

Content

Statement Settings continued

2. To change the number of days, select the 'Edit' button under the Payment Due Period.
 3. Select the number you desire from the drop down box. Once you have the number you want, press 'OK' to update your changes.
-

Content

Supplier Settings

The Supplier Settings page allows the exchange to decide on information and options displayed to people on the front end concerning supplier information.

To view Supplier Settings:

1. To access the Supplier Settings page click Content in the main menu and select the Supplier Settings link. This will load the Supplier Settings page.

To apply supplier settings:

1. Each setting on the Supplier Settings page can be changed by selecting the Yes or No radio button and pressing the 'Update' button.



Supplier Information

Supplier information is to be viewable if the user is not logged in:

Yes

No

[Update](#)

Description of Settings:

Supplier Information:

Supplier information is to be viewable if the user is not logged in:

Supplier Detail Information:

Company GST Number will be viewable for the other members:

Shipment - Payment:

Shipments can be paid using Barter Dollars:

Trade Urgently Needing Highlighting:

Highlight members with status: 'Trade Urgently Needed' on search and category browse results:

New Listings:

New Listings section will be display on homepage:

CHAPTER FOURTEEN

Item

From here you are able to modify settings regarding members and their online listings.

This includes searching products, services and listings from the administration site, and also approving items before they are visible on the website.

Contents

Item Settings	181
Products	182
Service	183
Listings.....	184
Approving Items	185

Item

Item Settings

The Item Settings page allows you to configure the thresholds which will show a product or service as ‘New!’ or ‘Hot!’ on the front end. From here you can also modify settings relating to the Item Approval feature [if enabled].

To view Item Settings page:

1. To access the Item Settings page click Item in the main menu and select the Item Settings link. This will load the Item Settings page.

The screenshot displays the 'Item Settings' page with the following sections:

- You are here:** Item >> Item Settings
- Hot / New Threshold Configuration:**
 - A product is labelled "hot!" when the discount is above %
 - A product is labelled "new!" for the first days
 - A service is labelled "new!" for the first days
- Item Display Filter:**
 - Display listings, products & services that are still awaiting approval? Yes No
 - Approve all current directory listings [Approve Listings](#)
 - Approve all current products [Approve Products](#)
 - Approve all current services [Approve Services](#)
- Save** button

To change Item Settings:

1. Hot Threshold Configuration allows the exchange to set the discount percentage that shows products as ‘hot!’
2. The exchange can also define how many days a product or service is considered as a new product or service.
3. To modify, enter the desired numbers and press ‘Save’.

Item

Products

The Products page allows staff to perform searches of all products that are available on the trading site that have been uploaded by members

To view Products page:

1. To access the Products page click Item in the main menu and select the Products link. This will load the Products page shown below

Product Selection

Category :

Search By : Supplier : Account Number :

Date Added : From To

Price Range : Min Max

Product Name :

Sort By :

Name	Price	Available	Quantity	Add Time	Vendor
Key Holer	\$340.00	No	664	03 Apr 07 12:25:00	XO Limited
Paintings 18th Century	\$1,600.00	Yes	1	28 Feb 07 03:56:00	XO Limited
Paintings 18th Century	\$2,000.00	Yes	1	28 Feb 07 04:06:02	XO Limited

To search for a product:

1. Select the category you would like to search in, or all categories. The search can be limited by one, or all suppliers.
2. Choose other information such as Date Added, Price Range, Name
3. Select search limits. Then press 'Search'

Item

Service

The Service page allows staff to perform searches of all services that are offered by members on the trading site.

To view Services page:

1. To access the Products page click Item in the main menu and select the Products link. This will load the Products page shown below

Service Selection

Category :

Supplier : - All -

Date Added : From To

Rate : Min Max

Service Name :

Sort By :

Name	Location	Add Time	Available	Provider
A Private Home - Home Stay	Christchurch	17 Mar 07 09:29:08	Yes	www.bookkeepers.co.nz
Recruitment Services	Hutt Valley	03 Apr 07 02:47:00	Yes	www.bookkeepers.co.nz
www.bookkeepers.co.nz	New Zealand	22 Apr 07 12:45:00	Yes	www.bookkeepers.co.nz

To search for a product:

1. Select the category you would like to search in, or all categories. The search can be limited by one, or all suppliers.
2. Choose other information such as Date Added, Price Range, Name
3. Select search limits. Then press 'Search'

Item

Listings

The Listings page allows staff to perform searches of all listings that are available on the trading site that have been uploaded by members

To view Products page:

1. To access the Listings page click Item in the main menu and select the Listings link. This will load the Listings page shown below

Listing Selection

Search By : Company - All -

Account ID

View All Listings

Approval Status: View Listings Awaiting Approval

View Approved Listings

View Disapproved Listings

Date Added : From

To [Clear Dates](#)

Company Trading Name :

Sort By : Date Added ▼ Descending ▼ Search

Your search has returned 154 results

Delete
Disapprove
Approve

Trading Name	Date Added	Company	Status	Select
tttt	07 Aug 07 12:32:28	tttt	Awaiting Approval	<input type="checkbox"/>
xotester3	07 Aug 07 12:28:28	xotester3	Awaiting Approval	<input type="checkbox"/>

To search for a directory listing:

1. Select the company you would like to search for, or select all companies.
2. Choose other information such as Date Added, Price Range, Name or whether the listing is approved, waiting for approval or disapproved.
3. Select search limits. Then press ‘Search’

Item

Approving Items

Item Approval allows the exchange to view and censor Product, Service and Directory Listings before they are allowed to be viewed on the front end. To enable or disable Item Approval see page 94.

To approve items:

1. To approve items, go to the Products, Services or Listings page under Item (see page 180) and do a search for all products waiting for approval.
2. Next to the search results you will see that the status is set to 'Awaiting Approval'. To view the listing click on the name of the item under trading name, if you are satisfied with the report check the 'select' box and press 'Approve'
3. You have approved the item.

Modify Selected Items				
<input type="button" value="Delete"/> <input type="button" value="Disapprove"/> <input type="button" value="Approve"/>				
Trading Name	Date Added	Company	Status	Select
tttt	07 Aug 07 12:32:28	tttt	Awaiting Approval	<input type="checkbox"/>
xotester3	07 Aug 07 12:28:28	xotester3	Awaiting Approval	<input type="checkbox"/>

To approve all items:

1. To approve all items at once, see Item Settings on page 181.

CHAPTER FIFTEEN

Logs

The logs functionality is a security function that allows exchange to keep track of who has been using the software system. This feature can not be disabled.

Contents

Merchant Members	187
Office Staff	188

Logs

Merchant Members

The Merchant Members logs page allows the exchange management to see when members have logged into the trading site.

To view member logs:

1. To access the Merchant Member logs page click Logs in the main menu and select the Merchant Member link. This will load the logs page shown below

ID	Business Name	User	Login Time	Logout Time
50494			23/04/2007 4:15 p.m.	23/04/2007 4:15 p.m.
50493			23/04/2007 4:13 p.m.	23/04/2007 4:13 p.m.

To search for specific information:

1. Select whether you would like to view 'all dates' or whether you would like to search by a date range.
2. Choose how you would like to view the information, by either pressing 'Show Results' or downloading as CSV or XLS.

Logs

Office Staff

The Office Staff logs page allows the certain members of exchange management to see when other staff have logged into the administration site.

To view member logs:

1. To access the Office Staff logs page click Logs in the main menu and select the Office Staff link. This will load the logs page shown below.

Exchange Member Logs			
FROM:	<input type="text" value="16/04/2007"/>	<input type="button" value="Select Date"/>	
TO:	<input type="text" value="23/04/2007"/>	<input type="button" value="Select Date"/>	
<input type="button" value="Show Results"/>		<input type="button" value="Download CSV"/>	<input type="button" value="Download XLS"/>
<input type="button" value="Clear All"/>			
* leave dates blank to get all logs			
ID	Username	Login Time	Logout Time
32048		23/04/2007 4:44 p.m.	23/04/2007 4:44 p.m.
32047		23/04/2007 4:35 p.m.	23/04/2007 4:35 p.m.
32040		23/04/2007 4:15 p.m.	23/04/2007 4:30 p.m.

To search for specific information:

3. Select the date range you would like to search within.
4. Choose how you would like to view the information, by either pressing 'Show Results' or downloading as CSV or XLS.



TIP: Remember, staff access to logs can be restricted from the Staff Permissions page.

CHAPTER SIXTEEN

Translation

The ‘Translation’ feature allows you to adjust the language of the Administration Site as well as the User Site.

To be able to do translations you need to get the translation rights first. These are assigned by XO Super User. Usually XO would assign the translation rights to one username and password.

If you don’t have the translation rights assigned, after clicking Translation > Default Language you’ll see the information: ‘You do not have permission to access the requested page’. You won’t also see any other function in “Translation” feature

Contents:

Default Language.....	190
Pending Translations.....	191
Translate a Page.....	192
Translate SMS.....	194
Translate Category.....	195

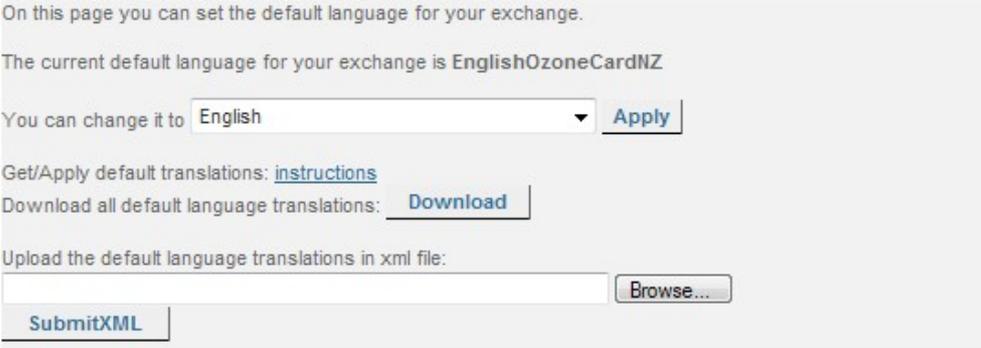
Translation

Default Language

The Default Language page allows the exchange to set the default language that both the front and back end will be displayed in.

To view Default Language

1. To access the Default Language page click Translation in the main menu and select the Default Language link. This will load the Default Language page shown below.



On this page you can set the default language for your exchange.

The current default language for your exchange is **EnglishOzoneCardNZ**

You can change it to

Get/Apply default translations: [instructions](#)

Download all default language translations:

Upload the default language translations in xml file:

2. Choose a language from the dropdown list and press 'Apply'.
3. If you would like to create a new translation, follow the instructions available by clicking the 'instructions' link.

Translation

Pending Translations

This page displays a list of pages with pending translations in your translatable languages. This will change from time to time as pages are changed and added to the system.

To view Pending Translations:

1. To access the Pending Translations page click Translation in the main menu and select the Pending Translations link. This will load the Pending Translations page shown below.

This page displays a list of pages with pending translations in your translatable languages. This will change from time to time as pages are changed and added to the system.

EnglishOzoneCardNZ

</xoadmin/access/forgotpassword.aspx>
</xoadmin/accountmanagement/1099breport.aspx>
</xoadmin/accountmanagement/account.aspx>
</xoadmin/accountmanagement/accountcommission.aspx>
</xoadmin/accountmanagement/accountdetail.aspx>
</xoadmin/accountmanagement/accountdetails.aspx>
</xoadmin/accountmanagement/accountprintview.aspx>
</xoadmin/accountmanagement/addnewcrmevent.aspx>
</xoadmin/accountmanagement/agedcashduereport.aspx>
</xoadmin/accountmanagement/automateaccountnumber.aspx>
</xoadmin/accountmanagement/autopay.aspx>
</xoadmin/accountmanagement/autopaydetails.aspx>
</xoadmin/accountmanagement/autopayinsert.aspx>
</xoadmin/accountmanagement/batchaccountadjustment.aspx>
</xoadmin/accountmanagement/cardtransactioninsert.aspx>
</xoadmin/accountmanagement/cashreceiptdetails.aspx>
</xoadmin/accountmanagement/commissionpayment.aspx>
</xoadmin/accountmanagement/commissionpaymentpayable.aspx>

2. Clicking on a page link will take you to the relevant 'Translate a Page' page.
3. See Translate a Page from step 3 on page 192 for the next step.

Translation

Translate a Page

This page will allow you to translate any part of the system using the online interface.

To view Translate a Page:

1. To access the Translate a Page page, click Translation in the main menu and select the Translate a Page link. This will load the Translate a Page page shown below.

You can translate the following languages:

[EnglishOzoneCardNZ](#)

2. Select the language you would like to translate. This list will depend on which languages have been assigned to you by XO. This will show you the page below.

Translating content

Language : EnglishOzoneCardNZ

Page : -- Select a Page --

Important Notes:

- You cannot enter in html as a translation.
- Your customers will see your translations next time they log in.
- If you see any default text that does not make sense (such as numbers or names) then please click [here](#)

No text found on this page for translation

3. Select the page you would like to translate from the drop down box. This will display a page similar to the one below.
4. The 'Default Text' column is the original text in English. The text box under 'Local Text' is where the translation of your local language should be written.
5. When you have finished the translation changes, press the 'Update All' button.

 **IMPORTANT:** You can only text into this box, entering HTML or JavaScript will not have any effect on the text displayed.

If you do not require a phrase to be translated just leave the box with nothing entered in it.

Translation

Translate a Page continued

Translating content

Language : EnglishOzoneCardNZ

Page :

Important Notes:

- You cannot enter in html as a translation.
- Your customers will see your translations next time they log in.
- If you see any default text that does not make sense (such as numbers or names) then please click [here](#)

[Show All](#) | [Pages](#)

Default Text	Local Text	
Forgotten Password Retrieval for	<input type="text"/>	Delete
Close Window	<input type="text"/>	Delete
Update All		

Translation

Translate SMS

This page displays a list of the SMS messages that can be sent to your members in SMS message. This page will let you translate these messages into a local language.

To view Translate SMS:

1. To access the Translate SMS page click Translation in the main menu and select the Translate SMS link. This will load the Translate SMS page shown below.

You can translate the following languages:

[EnglishOzoneCardNZ](#)

2. Select the language you would like to translate. This list will depend on which languages have been assigned to you by XO. This will show you the page below.

Language : EnglishOzoneCardNZ		
Important Notes: - Include all relevant tags (e.g. <Balance>, <Account Number> etc) in the translated text. - Do not translate tags.		
Default Text	Local Text	Edit
BAL: T\$<Balance> O/DRAFT: T\$<OD Limit> TOT AVAIL: T\$<Total Balance>	BAL: OzCd\$<Balance> O/DRAFT: OzCd\$<OD Limit> TOT AVAIL: OzCd\$<Total Balance>	Edit
CASH DUE: \$<Cash Due>	<input type="text"/>	Update Cancel
CASH DUE NIL. Credit Balance \$<Cash Due>		Edit

3. The 'Default Text' column is the original text in English. The text box under 'Local Text' is where the translation of your local language should be written.
4. To edit the text, press the 'Edit' link next to the message you would like to translate. When you are satisfied with the message, press 'Update'.

 **IMPORTANT:** Make sure that you include the tags in your translated message, these are the information the member will be sent. The tags must not be translated and should be copied and pasted into the new message.

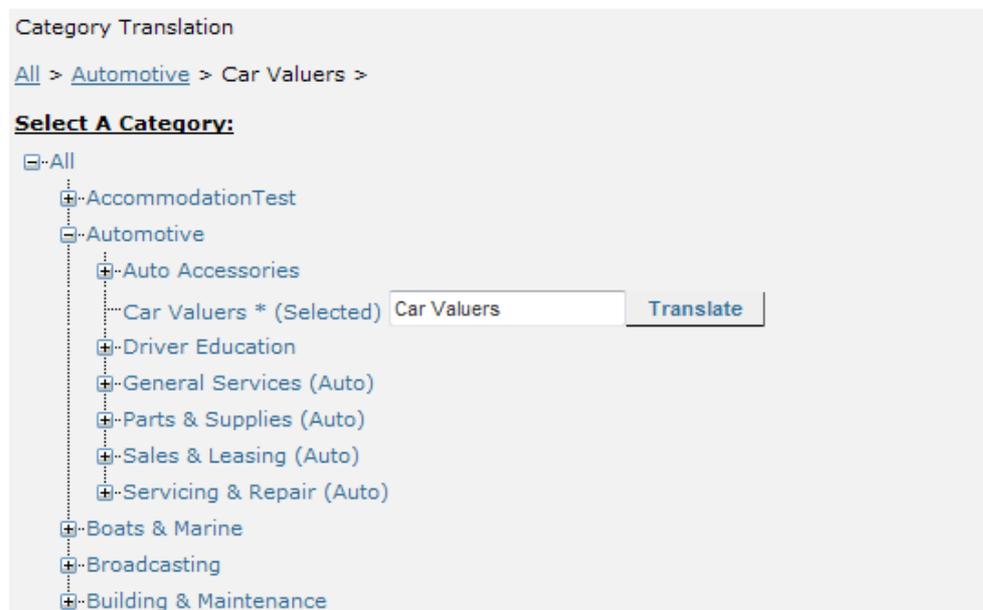
Translation

Translate Category

This page will allow you to translate the Product, Service and Listings categories that will be shown to members. For information on how to hide and show categories see View/Hide Categories on page 140.

To view Translate Category:

1. To access the Translate Category page click Translation in the main menu and select the Translate Category link. This will load the Translate Category page shown below.



2. To translate a category name, click on the name of the category.
3. A text box will be displayed, enter your translation in this box
4. When finished, press 'Translate'.