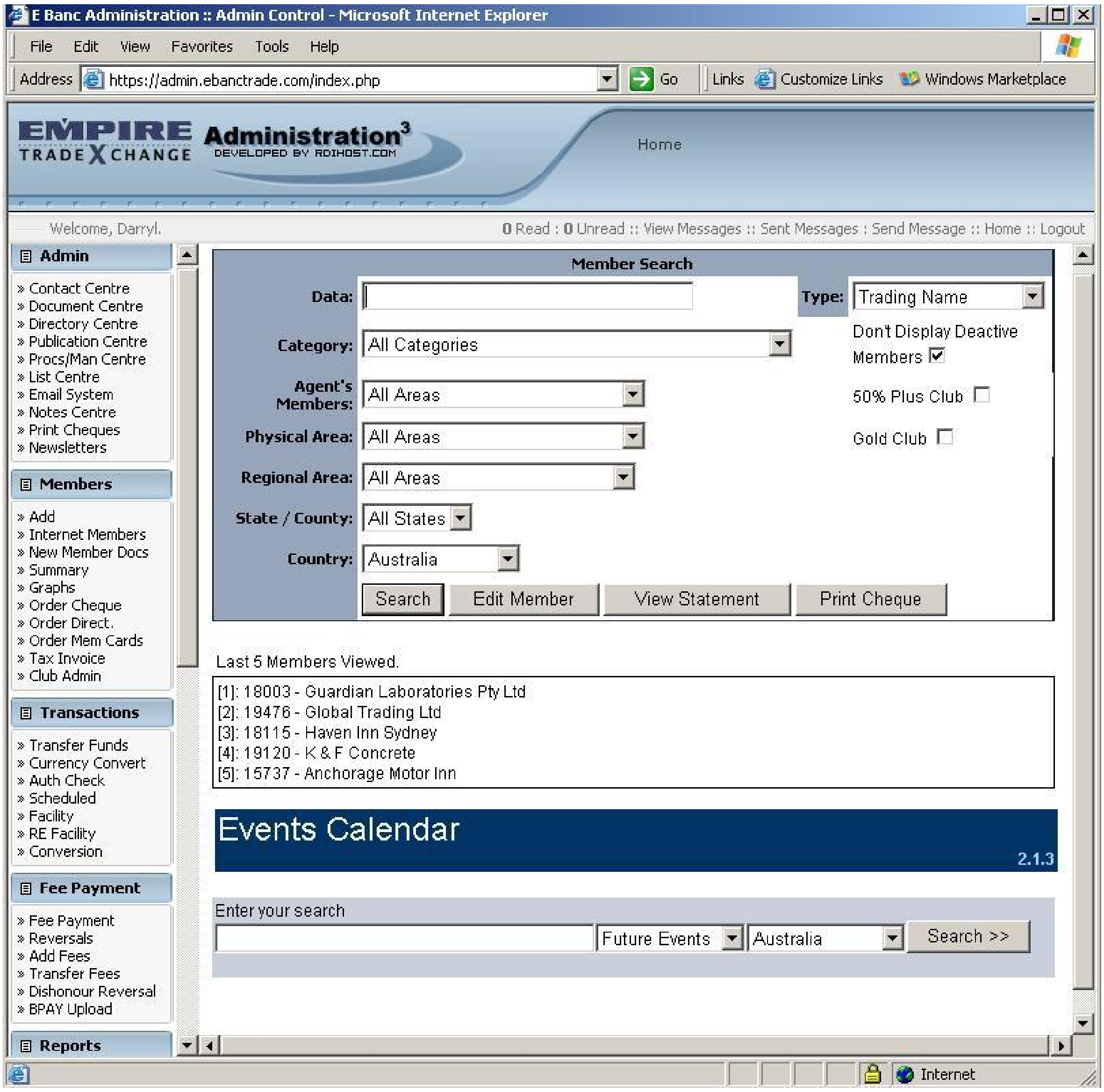
Intranet

USING THE INTRANET



INTRANET URL: https://admin.etxint.com

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Guide to Using the Intranet

The Intranet is available to ETX International agents and staff worldwide and is the information and communications hub for the company. Agents can search the database, add notes to member records, check sales and commission records, and send messages to other staff and Agents worldwide. You can order cheques, obtain up-to-date agency email lists, upload agency newsletters, create and email member bulletins, and set yourself tasks with a reminder. You can transfer funds, pay fees, view member account information, email usernames and passwords to members and download and print Agency reports. You can also add and edit auction/classified entries, and search the real estate database. All Exchange stationery, forms, and publications are available from this site. The level of access to the intranet is determined by your position within the exchange.

Our goal is to provide all the information you require at your fingertips, right from this secure location.

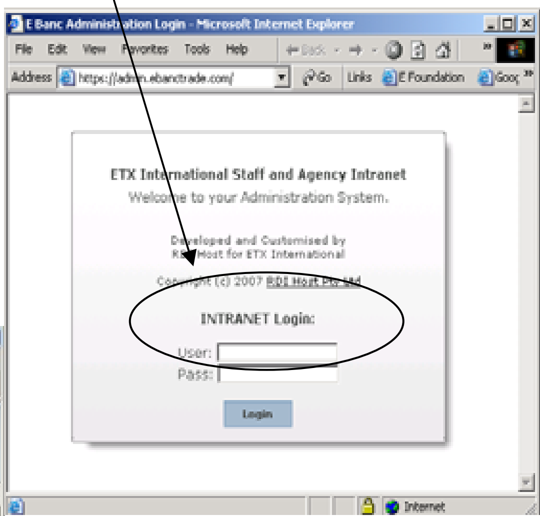
All Agents and staff can use the intranet once they have received a username and password. National and Regional Agents can apply for access for their staff by completing the **Intranet Access Request** form available from the **Document Centre** on the Intranet and faxing it to international Head Office on +61 [0]7 5437 7231

This guide will step you through the Intranet functions and it will become a powerful tool to both Agents and staff of ETX International.

Let's begin . . .

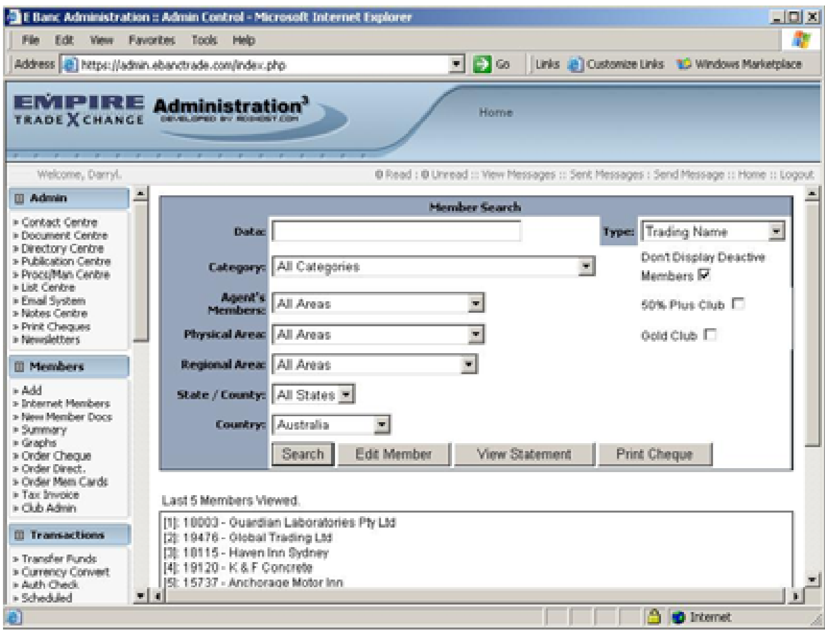
I. Logging on

The Intranet can be accessed at https://admin.etxint.com. You will then be asked to enter your username and password as below.



The Intranet hosts the online system that staff work from, providing all the necessary information needed to service the members' needs.

Access can be provided by submitting the Intranet Access Request form that is available from the Document Centre. National or Regional Agents must approve the request by signing this form and faxing it to International head office. Without the Agent's signature, we cannot authorise access for their staff.



II. Search Methods

The member search screen is the default screen when you first log into the system. It provides several ways to search the membership base.

1. Data Field

The Data field is where you enter a keyword to search for a particular member. You do not need to enter the entire word. For example:

To search for Scoozi Café/ Bar you can type 'Scoo' and this will bring up every company name that has the letters 'Scoo'.

You can just type in 'bar' and it will still list Scoozi Café / Bar along with any other listings with the letters 'bar' in the company name.

Trading names including punctuation: you must include the punctuation marks and spaces for the search to be successful. For example: with 'G.P Appliance Services' you need to type in 'g.p'. If you simply typed 'gp' without the space, then this would not bring up 'G.P Appliance Services'.

For surnames such as 'Van Der Ley', you can simply search by typing: 'Van D'. This will bring up all companies name that include the combination of 'Van D'. It will bring up names such as 'Evan Dickson', as 'van D' is included in this name.

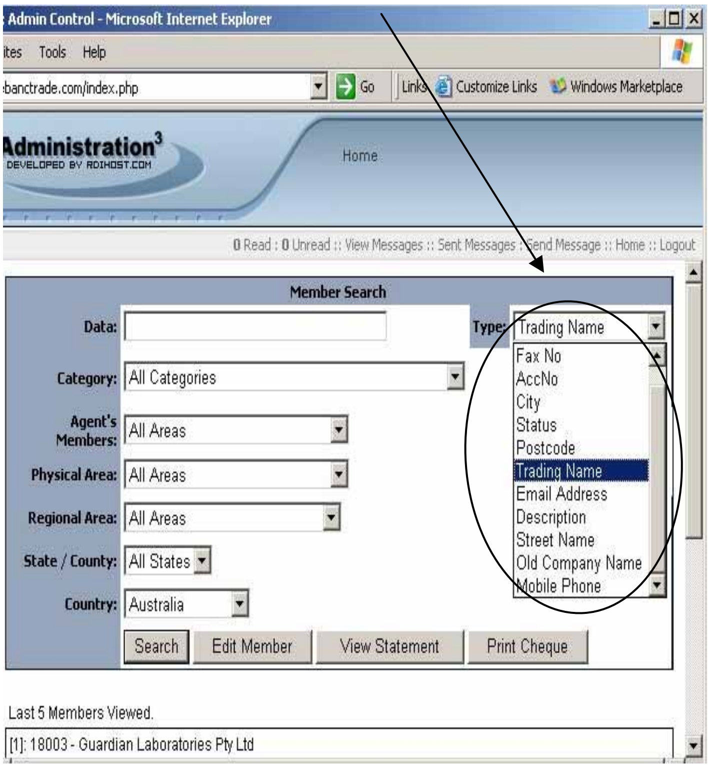
You can also use numbers in the data field to search for **account numbers** or **phone numbers**. Numbers could also be included in the business name.

The '@' symbol can be recognised in the data field to search for **email addresses**.

You can bring up a member's account by typing the account number into the data field, then clicking on 'Edit Member'. You can bring up a member's statement by typing in the account number into the data field then clicking 'View Statement'.

2. Search Type

Above we have shown how to search by **Trading Name** using the **Data field**. When searching under the trading name, the keyword you enter will bring up any matching words that are found in either the company name or contact name. There are other '**Types**' of searches you can do.



- **Phone & Fax Number** allows you to search phone numbers, but will only search for the main contact number, and will not search the home numbers or mobile numbers. Again as in the company name search you do not need to type the whole phone number. By typing in 0754 this will list all phone numbers including this combination.

- **Acc No**, allows you to search for specific account numbers. You can also search by account number, regardless of the search type selected, by typing the account number into the data field, then clicking on 'Edit Member'.

- You can search under **City** to display all the members in that city.

- **Status** allows you to bring up all members listed under a particular status. By entering one of the status numbers displayed below into the Data field, the list of members you require by status will display.

2. Search Type contd

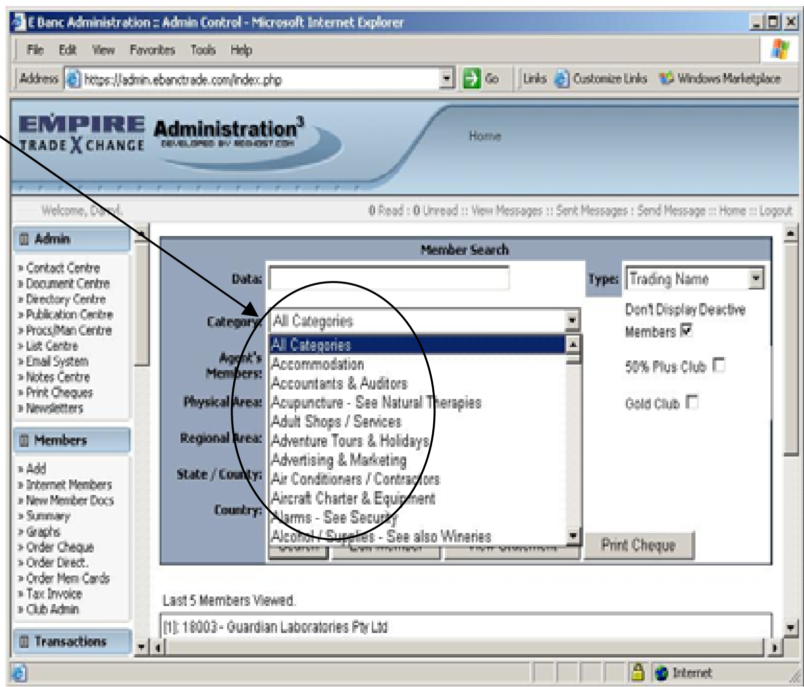
- **Status Code**

0	Active	Normal status for a working account
1	Deactive	Account has been closed
2	Contract	Accounts established by conversion of a currency other than BBX or Bartercard. Funds can only be used for property purchase or big ticket items by approval. Cheque books are not issued.
3	Staff/Director	Empire Trade or member staff accounts
4	Sponsorship	Account established for sponsorship funding. Can also operate as an active trading account if requested.
5	Suspended	Account not able to spend funds, but can still receive funds.
6	Suspended/Locked	Account is suspended and locked and cannot be viewed by staff and Regional Agents. The file has been transferred to the debt recovery agent.

- Searching by **Postcode** will bring up all members with that particular postcode.
- When looking for a particular member, searching by **Email Address** may be of use. The '@' symbol can be recognised in the data field to search for email addresses.
- **Description** is a very useful search method. With this you can enter a keyword which will bring up every listing that has this word in their promotional message. So when searching for a particular product, for example chain saws, when typing this in the data field and searching under description, it will bring up every listing with the words 'chain saws' in their promotional message. This may bring up a general trader or someone who you would not have ordinarily have searched under to find a chain saw.
- You can find a particular member by searching under **Street Name**.
- If you having difficulty bringing up a particular member, searching by **Old Company Name** may yield results. If a member changes their business name, our system will record the last company name, allowing us to search under Old Company Name.

3. Category Search

You can search by category. The full list of categories displays from the drop down menu. With your cursor in the Categories box, simply typing in the first letter of the category you require will take you to the first category starting with that letter. Remember if a person is not listed or has been unlisted temporarily, they will not display when using this category search.



4. Area Search

There are various area searches available.

Agent's Members: By selecting a specific Agency area, all members signed under the Regional Agent will display.

Physical Area: By selecting a specific Agency Area, all members physically located within this area will display, however may be signed under different Regional Agents.

Regional Area: This displays members within the selected geographic region. For example: You can simply search under Brisbane, Sunshine Coast, etc.

These both can be used in conjunction with other search methods. i.e. searching under a particular category, type or keyword, you can also select a search area, further defining your search.

State/County: Restrict your search to a particular state or county within a country

Country: This allows you to select a country first, **before** using other search methods.

III. Using the Intranet

1. Account Status Code

Once you have performed a search, your search target will display. To the right of each business entry are two letters that relate to member status.

- **A** Active account (Normal status for a working account)
- **C** Contract account (Funds can only be used for property purchase or big ticket items by approval. Cheque books are not issued)
- **S** Staff account
- **P** Sponsorship account
- **D** Deactive account (This is a closed account)
- **U** Suspended account (This account can deposit funds, but not spend)
- **L** LISTED in the membership directory
- **N** NOT listed in the membership directory
- **T** Temporarily unlisted

The **Intranet Coding Guide** available from the Document Centre under Member Support is a useful tool when decoding the Intranet terminology and identifiers.

2. Club Identification

When a business has joined either the 50% Plus Club or the Gold Club, they are identified in the directory search screen by either a 50% or Gold after their entry in red font.

3. Notes Programme

Selecting the “**N**” against the business entry displayed on the screen allows you limited access to the notes program. Once a note has been entered on an account, the **N** then changes to orange in colour. If a note has not been entered, it remains blue in colour. For access to full **Notes** features, first select **‘E’** to enter member **Edit** mode, and then select **Notes** from the text links on the member detail screen top menu bar. The Notes Centre will be explained in full in the section **5.j** under **Edit Member Details**.

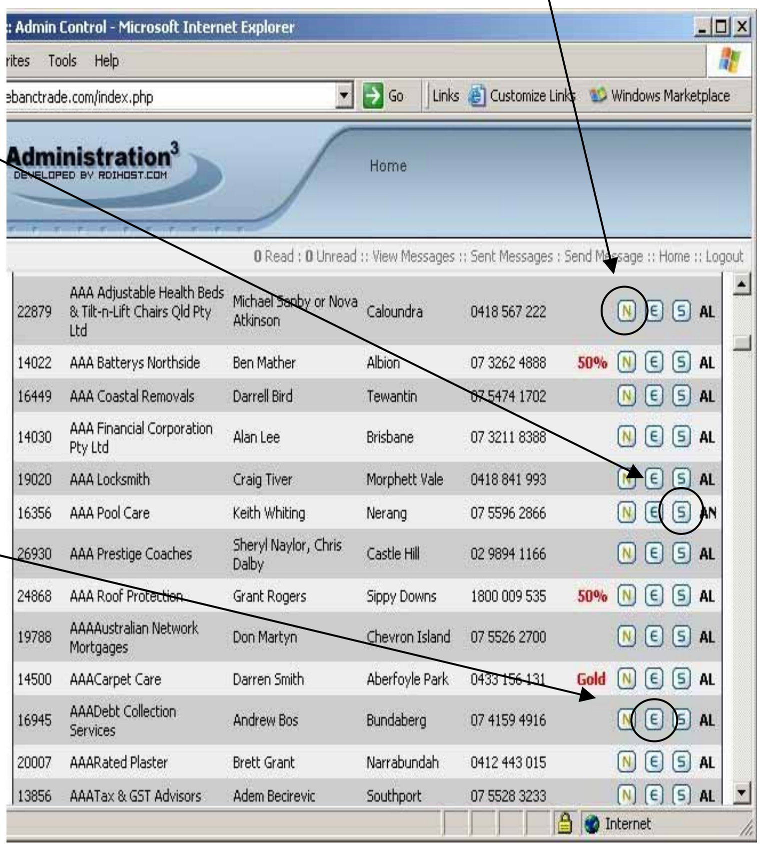
4. Statements View

Selecting “**S**” will give quick access to the member’s latest statement summary. Remember you can also have direct access to a Member’s statement by typing the account number into the data field and selecting ‘View Statement”.

5. Edit Member Mode

Selecting the “**E**” takes you to Member Edit mode. Several screens are available however the default is set at ‘Main’.

You can request ‘Print View’ as your default by ticking the appropriate box on the Intranet Access Request form, or by emailing your request to infosys@hq.etxint.com. Print View displays all the member account information on one scrolling screen.

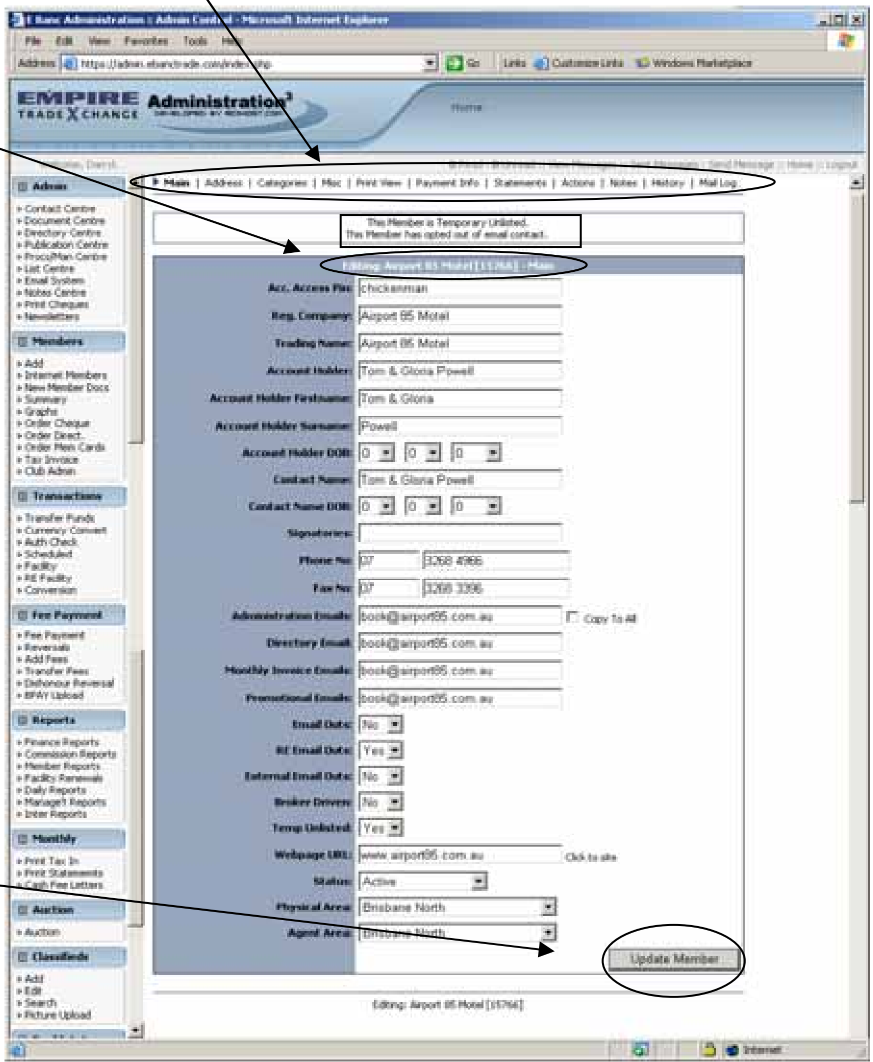


Note: There are several levels of access depending on your position within the exchange, and not all functions are widely available. If you cannot access a function you need to complete your work, please contact the Information Systems department at International head office: infosys@hq.etxint.com. All staff access must be approved by your Supervisor or National / Regional Agent.

5. Edit Member Mode contd

Once you open a member's account information by clicking on ‘**E**’, all account functions can be carried out by selecting the appropriate function or view from the **text links** at the top of the member detail screen.

On each screen view, the member account name and number is displayed at the top and bottom of the screen.



a. Main View

From Main view the box displayed above the member details advises account status, and prompts for actions that need to be taken on the account. For example when a member has opted out of receiving Real Estate emails or promotional emails or if a PIN is required. If a Direct Debit form is required the reduced admin fee will be displayed as well as the current admin fee applicable to the account.

Always read this information whenever you access a member's details. You may be able to address an error or omission when next you speak with the member, i.e. ask them for a PIN; request an email address when no stationery fee is charged; etc.

Depending upon the access level you have, the fields in Main View are all editable.

You simply make the necessary change and then click ‘Update Member’.

b. Main View Explained

If this member is also a member of the 50% Plus Club or the Gold Club, this will be displayed at the top of the Main Screen.

Acc. Access Pin:	This password is chosen by the member on signup, and is necessary to identify an account holder who calls in for account information. Information **can not be provided verbally** unless the Access PIN is quoted.
Reg. Company:	Company name if account holder is incorporated.
Trading Name:	If different from company name.
Account Holder:	First name & surname of account holder/s. If multiple account holders, names must be separated by comma. i.e. Paul Brown, Peter Jones.
Account Holder Firstname:	The split between first name and surname is necessary for the correct salutation on correspondence to be created during mail merge. If multiple account holders, first names must be separated by ‘&’ i.e. Paul & Peter.

Account Holder Surname:	If multiple account holders, surnames must be separated by 'comma' i.e. Brown, Jones.
Account Holder DOB:	Date of birth
Contact Name:	This is the name which is printed in the membership directory as the main contact for the business. This may vary from the account holder as the owner may wish for all sales queries to go to a different person in the company. The Contact person is not authorised to make changes to the account or receive statement information.
Contact Name DOB:	Date of Birth of nominated contact person.
Signatories:	Add names here of any authorised additional signatories to the account. Authorised Signatories can sign cheques and receive statement information.
Phone Number:	This is the contact number that will be printed in the membership directory and must include the correct area code, e.g. area code 07 phone number 5437 7225. The country code is automatically entered by the system.
Fax Number:	The fax number is also listed in the membership directory and must include the correct area code.
Emails:	The majority of members will have only one email address for all services. The following is not something we wish to broadcast to members, however should they ask to have certain types of emails to be sent to separate addresses this can be accommodated. A member can elect to have four email addresses if they wish to direct the types of incoming emails: Administration, Directory, Monthly Invoice and Promotional email address. You can also place more that one email address in these fields provided they are separated by a semi colon (**;**) and no space.
Administration Emails:	The email cannot be removed unless the member is aware that by doing so they will be charged a monthly cash fee to receive their monthly statements and promotional information via the post. **This email address must not be given out.**
Copy To All:	If you are updating an email address for your member and they only have the one address, you can update all four at once by ticking the box beside the first address. If the member has different addresses already registered, make sure you check if all need to be updated, or just one.
Directory Emails:	The **only email address that can be legally given out to members** is the Directory email address. All other email addresses may be protected by Privacy Legislation and cannot be divulged to other members. Some members do not wish to be contacted by other members via email and in these cases, the Directory email will be blank. When this occurs, you cannot give out any other email contact that may appear for this member. This email address should not be left blank if the member wishes their email address to display in the directory.
Monthly Invoice Emails:	A separate email address can be used for receipt of invoices.
Promotional Emails:	A separate email address can be used for receipt of newsletters and promotional information.
Email Outs:	Yes or No – Select 'No' when the member does not wish to receive any promotional or Real Estate emails.
RE Email Outs:	Yes or No – Select 'No' when a member does not wish to receive any real estate emails, but does wish to receive promotional emails.
External Email Outs:	Members can choose to receive extra promotional emails other than the national bulletin and Spotlight. Often members have special offers that are time sensitive and need to go out immediately. By subscribing to this list, members will receive these one off promotional emails.
Broker Driven:	Yes or No. This is for members who do not want to be listed, but want to trade via their regional agent. Requests for members to be broker driven must be sent to Head Office for action. A category and directory message must always be included, even though it does not display in the directory, so other agents and staff are aware of what service this member provides and can locate them when searching the intranet. All contact with the member must be made via their Regional Agent.
Temp Unlisted:	Yes or No – Select 'No' when the member temporarily ceases trading.

Web Page URL:	The member business website address. Do not include 'http://' as the system includes this.
Status:	Displays whether a member account is Active, a sponsorship, suspended, suspended and locked, a contract account or staff/director status.
Physical Area:	The geographic/physical location of the member business (regardless of their Agency area).
Agent Area:	The Agency area to which the member belongs (regardless of the physical location of their business).
Agent:	The name, Address and contact numbers for this member's Regional Agent

c. Address View

Address view displays the geographic location of member, plus business and postal address of the member. The member's home address is also displayed here, **but must never be given out**. It does not display in the directory. Once you make any changes, remember to click on '**Update**'.

Physical Area:	Is the geographical location of the member's business
Street Number:	Alpha numeric entry, e.g. U 6, 155. Leave this section blank if only a PO Box.
Street Name:	Must be entered with the correct designation, e.g. St, Rd, Cl, Blvd, etc. If PO box address, include here.
2nd Address Line:	
Suburb / City:	Correct entry is important for accurate directory listing. This is usually the suburb and not the city. It is also the location that displays under a directory search.
State / County:	
Postcode / Zip:	
Same Postal Address:	Tick box if postal and physical address is the same.
Postal Street Number:	Complete this section if postal address is different from physical address. Do not use this field for Postal Box addresses
Postal Street Name:	Use this field for PO Box and Number
2nd Address Line:	
Postal Suburb / City:	
Postal State / County:	
Postcode / Zip:	
Home Address:	The home address is for our contact only and **must not be given out**. It does not display in the Directory
Home Street Number:	
Home Street Name:	
2nd Address Line:	
Suburb / Home City:	
Home State / County:	
Home Postcode / Zip:	

d. Categories View

Categories and category messages are displayed on this screen. Members can have multiple category listings with a separate message appearing against each category. This is useful when you have a member who offers two or more diverse services, or whose services stretch over two or more categories. Up to 4 categories can be entered.

Every member MUST have an account description entered, even unlisted and broken driven members. This provides information to other agents and staff about the purpose of the account. If they are not to be listed in the directory, select 'No Cat' and write a description such as 'Spend Down Only", "Property Investor", "Staff of Bob's Bakery", etc.

To Edit category information, click on the category name and the editable text will appear in the field box on the bottom of the screen. If you also wish to change the category name, simply select the new category from the drop down box.

You can also change the member listing for **National or Statewide**, so their entry will display in the category listing throughout the country, or throughout the state. Simply select the appropriate 'radio' button. Once the changes are complete, click on **'Update Category'**.

Category:	Description:
	English Description:
Jewellery / Gems (Delete)	The current description displays here.
	English Speaking Country.

ADD CATEGORY	
Category:	Accommodation
National:	○ Click on this radio button to display this category in each state.
Statewide:	○ Click on this radio button to display the member in all areas of the state.
Unselected:	● This is the default radio button. The member will only display in their regional area when this button is selected.
Description:	Type the new or amended description here, ensure the correct category is selected above using the drop down arrow to search categories, then select "Add Category" once complete.

Add Category

To add an additional category, simple type the information in the field box at the bottom of the screen, select the category you wish to add, and click on 'Add Category'.

Categories can be deleted by selecting the (Delete) option beside each existing category. The last category listed against a member cannot be deleted. If you wish a member to be unlisted, select 'No Cat' for but leave the category description. If the member is to be changed to Broker Driven, go to 'Main' view an select 'Yes' from the drop down box next to "Broker Driven". Regional agents and staff should follow the procedure for Unlisting or Broker Driven listed on the 'Procs/Man Centre' under the subheading, 'Membership'.

REMEMBER, EVERY ACCOUNT MUST HAVE A DESCRIPTION IN THE CATEGORY FIELD.

e. Miscellaneous View

Star Rating:	This is an internal rating system where staff can communicate with other staff by rating the members between 1 & 5 stars (lion paws). 1 paw for disgruntled member; 2 paws for unhappy members; 3 paws for members sitting on the fence waiting for changes to come into action; 4 paws for members who are good traders; 5 paws for great members. As the exchange is growing everyday it is hard to keep a close relationships with all the members. The star rating feature is to help staff determine at a glance the mind set of the member. It will also enable us to pull off lists of particular star rated members for analysis and comparison. If we also make this a common procedure when speaking with members, our analysis of happy to disgruntled members will be more accurate, and we can then build on restoring the confidence of the 1 and 2 paw members.
Acceptance Letter Sent:	This relates to the changeover of members from the old E Banc Trade Exchange structure to the new structure put in place in 2005. It does not impact on all countries.
Acceptance Letter Received:	This is ticked when the member has signed and returned the acceptance letter.
Latest Trade %:	This is the most recent trade percentage the member has advised they are accepting and the date they advised this percentage. This is for internal use only and is not published in the directory. Some codes used are: SN = See Notes 50%+ = above 50% Neg = Negotiable 50%- = below 50% For full coding information, see 'Intranet Coding Info' in the Member Support Manual.
ABN / Co. Reg:	Taxation or company registration number.
GS T/ VAT:	Select 'Yes' if member is registered for consumption tax.
Wages Account:	When a member is joined as staff of another Empire Trade member, the account number of the employer must be entered here. A staff account can only receive funds from this nominated employer account.
Online Username:	A username is created by the system when the membership application is processed. The username and is required to log into the members secure area. (This can be auto emailed to a member by clicking on 'Send online username).
Online Password:	Password is created by the system when the application is processed and is required to log into the member's secure area.
Mobile:	The mobile number is not printed in the membership directory. We do give this information out if requested. If the member wishes to have their mobile number private, put it in the notes system instead of here.
Home No:	Home number is not displayed in the directory, and is private information unless advised by the member in writing that it can be given out.
Sales Person:	Name of sales person who signed up the member
Membership Fee Payment Type:	How the membership was paid.
Membership Fee Paid:	Amount the member paid.
Trade % in Membership Fee Paid:	Percentage of membership fee above that was accepted in trade credits. This only has relevance in certain National Agencies.
Agent Paid	This displays Yes when the Regional Agent has been paid their commission on this membership sale.
Member Paid	Tick Yes or No. In most cases it is company policy not to process a membership unless the membership fee has been received. There are some exceptions relevant to certain National Agencies.

Banked:	Date the member's application fee was deposited.
Date Joined:	The date the member's application was processed.
Date Pack Sent:	The date the new member's pack was dispatched. This date is generated by the system.
Last Edited By:	Displays the name of the last person to edit the member's account.
Last Logged in:	Displays the date the member last accessed their online account.
Statement Display:	Displays registered name or trading as name to be printed on the member Invoice and Statement.
Fees Charged on Buy:	In some instances, fees may be charged on Sell instead of Buy. This is an option that should rarely be used by a National Agent.
Transaction Fee:	This is the transaction fee percentage applied to a member's account usually when they spend. Any variation to this fee listed in the National Trading Rules can only be approved by the National Agent.
Stationery Fee:	The amount a member is charged when they elect to receive invoices, statements and newsletters in print copy. This is charged monthly in cash. If you wish to provide a member with hardcopy information without charging them this fee, put .01 in this field.
Cheque Number:	The last sequential number on their latest check book issued. This is generated automatically by the system as chequebooks are printed. If for some reason this number need to be changed, it is a simple matter of typing in the number to be included on the first cheque slip on the new book to be printed. Ensure you are not duplicating numbers. For instance, you might need this function if a chequebook is printed, but for some reason cannot be used, i.e. it printed on the wrong paper, or the paper jammed in the printer.
Gold Card:	Yes or No for Gold Card status. This was a programme offered in Australia in the early days of the exchange. It is valid for the life of the membership for those members who joined, but is no longer offered to new members. Gold Card were purchased for cash and Gold Card members received reduced transaction fees and larger facility amounts, depending on their Gold Card level.
RE Spend down:	**Select Yes** if funds in this account were earned solely through the sale of a property, and the member is spending down the funds. No other incoming trading activity can take place on this account when Yes is selected.
Admin Fee Exemption:	**Select No** unless an exemption has been granted. The monthly cash administration fee is applicable to all active trading accounts, however some classes of membership may be exempt. Please refer to the Admin Fee Guidelines for full details. Exemption variations can only be approved by the National Agent.
ITT Exemption:	**Select No** unless an ITT exemption has been granted. Under certain circumstances, a member may be exempt from the ITT requirements. As with the Admin Fee exemption, this can only be approved by the National Agent.

f. Print View:

(If you wish this to be your default view when you first enter a member's account, email your request to infosys@hq.etxint.com).

From Print view the box displayed above the member details advises account status, and prompts for actions that need to be taken on the account. For example when a member has opted out of receiving Real Estate emails or promotional emails or if a PIN is required. If a Direct Debit form is required the reduced admin fee will be displayed as well as the current admin fee applicable to the account.

Use this view to see or print all information on a member's account. Membership details are displayed as below.

Contact Info

Star Rating:	See description under Miscellaneous view above.
Acc. Access Pin:	The account Pin is the verbal password that we request the account holder to state when needing information on their account
Account No:	The member's account number
Reg. Company:	The registered company name
Trading Name:	The company's trading name. If not different, the company name displays
Account Holder:	This is the authorised person who can sign for the account and is the primary account holder.
Account Holder Firstname	This field is required so letters are addressed correctly
Account Holder Surname	This field is required so letters are addressed correctly
Contact Name:	This is the name which is printed in the membership directory as the main contact for the business. This may vary from the account holder as the owner may wish for all sales queries to go to a different person in the company. The Contact person is not authorised to make changes to the account or receive statement information.
Signatories:	If the account holder wishes to nominate additional signatories to the account, those names would be listed here. Account Signatories are also authorised to sign on the account and can obtain statement information.
Phone Number:	This is the main contact number which is printed in the membership directory.
Fax Number:	The fax number is also printed in the membership directory.
Mobile:	The mobile number is not printed in the membership directory but is will display in the online directory. If a member would like to make their mobile number their contact number, simply put it in the 'Phone Number' field.
Administration Email:	If a member allocates an email address, they do not pay a $5.50 monthly fee In '**Misc**' view, 'Send Online Username' – automatically emails the member their username and password. The administration email address is for general communication of an administrative nature from head office. This email address will not be used for advertising member goods or services
Directory Email:	This is the email that is displayed in the directory as their business email contact
Monthly Invoice Email:	This email address is for the monthly tax invoice and statement only. We have occasions where a member requests these types of communication go directly to their finance department or accountant
Promotional Email:	This is for emails of a promotional nature, i.e. newsletters, event notifications, and property emails.
Email outs:	Yes or No – If this states YES the member will receive their tax invoice, updates and monthly email bulletins via email. If this states NO the member will only receive their tax invoice every month and will not receive updates and the monthly bulletins. In both cases, the email address will display online and in the directory.
RE Email Outs:	Yes or No – Whether or not the member wants to receive special emails on property purchase opportunities
Webpage URL:	Website address if available. This is a hyperlink to the member's website when clicked
Status:	Either: Active, Contract, Staff/Director, Sponsorship, Suspended, Suspended Locked or Deactive
Business Address	
Street No:	This is the business address that is printed in the membership directory.

Street Name:	These fields cannot be left empty.
2nd Address Line	If the member works from home and does not want their home address published, we need to still complete the Suburb, City, State and postcode fields.
Suburb /City:	
State / County:	
Postcode / ZIP:	
Postal Address	
Street No:	The postal address is for all correspondence. This address needs to complete and correct.
Street Name:	If this is a PO Box address, write the PO Box number here
2nd Address Line	
Suburb /City:	
State:	
Postcode / ZIP:	
Other Account Details	
Last Edited By:	Displays the last staff member who made a change to this account.
ABN / Co.Reg.:	Record the ABN or company registration number.
GST / VAT:	Yes or No – whether or not this company is GST/VAT registered.
Old Company Name:	If this member at any stage changes their company name, the previous company name is automatically recorded here. We can then search for members by their old company name.
Home No:	The home number is for our record only and is never to be given out.
Date Joined:	This shows the date the member joined Empire Trade.
Date Pack Sent:	This shows the date the new membership kit was sent to this member.
Online Username:	This is the username given to this account holder for them to login on our website and access their account information.
Online Password:	This the password used with the above username given to this account holder to login on our website and access their account information. The member can change this from the member's login section on the corporate website. By clicking on (**Send online username**) found after the Online Password, the member is sent an email containing both their Username and Password. Username and password should NEVER be sent to an email address other than the one listed on the account.
Physical Area:	This is the area where the member business is located.
Agency Area:	This displays the member's Regional Agent. These two areas may differ as any member can request to be under any Regional Agent when they meet certain criteria.
Agent:	This displays the name of the member's agent and contact details
Categories	
	This is the promotional message that describes the business. This is printed in the membership directory when a category heading is selected. As this is their advertising, this message should be detailed. You can have up to four different promotional descriptions against four categories. At least one category description must be included for each member even if the category selection is 'No Cat'. For other countries that use a language other than English, the promotional message is displayed again in English. National Agents are responsible for including an English translation of their home language entry.
Last Trade %	This displays the most recent trade percentage the member has advised they are accepting and the date they advised this percentage. Please see the Intranet Coding Guide from the Document Centre for terminology used here.

Category 1:	(Category Type) Each member can be listed multiple categories. Only Head Office staff can remove this first category
Category 2:	These are the categories where you will find this account listed in the membership directory.
Category 3: Category 4:	No Cat – means No Category If the only category fields used is 'No Cat' you must always include a description. This allows other staff and agents to understand why the account was opened.
Broker Driven:	Yes or No. If Yes, this indicates the member is broker driven member by the Regional Agent. They do not display in the directory and their services should be directly marketed by the agent who controls the account. Requests for members to be broker driven must be sent to Head Office for action. A category and directory message must always be included, even though it does not display in the directory, so other agents and staff are aware of what service this member provides and can locate them when searching the intranet. All contact with the member must be made via the controlling Agent.
Temp Unlisted:	These are the members who have asked to be unlisted for a period of time either to spend down, or while they are away, for example.
Contractor Directory:	Yes: this business is included in the downloadable list of members whose services would be of interest to Building Contractors
Restaurant and Accommodation	Yes: this business is included in the downloadable list of Restaurants and holiday Accommodation available
Restaurant and Accommodation Supplies	Yes: this business is included in the downloadable list of members who supply Restaurant and Accommodation houses
Tourist	Yes: this business is included in the downloadable list of members whose services would be of interest to tourists and holiday makers
Business Services / Supplies	Yes: this business is included in the downloadable list of members who service and supply business needs
Wedding Directory	Yes: this business is included in the downloadable list of members who offer bridal and wedding services
Sales Person Details	
Sales Person:	This displays the sales person who signed this member up to Empire Trade.
Membership Fee Paid:	This displays the membership fee that was paid to join.
Trade % in Membership Fee Paid	Percentage of membership fee above that was accepted in trade credits. This only has relevance in certain National Agencies.
Membership Fee Payment Type:	This indicates how the fee was paid. (Cheque, MasterCard etc)
Payment Method	
Payment Type:	If a person wishes to pay their monthly cash fees automatically from their credit card, this will display the credit card type we have recorded, for example: VISA or MASTERCARD.
Facility:	This displays the amount of the goods and services facility provided to the account.
Real Estate Facility	This displays the amount of facility provided to the member the purchase of Real Estate
Transaction Fees	
Buy/Sell:	This shows the transaction type on which a fee is charged. In almost all cases this will be on Buy.
%:	This shows the transaction fee percentage that applies to the account.
Stationery Fees	
%:	If a fee is displayed here, the member is an offline member or has chosen to receive statements, newsletters and member updates via the post and is charged this cash fee monthly. .01 in this field indicates that the member is receiving hardcopy information, but is not being charged the stationery fee.

Referer	
Account No:	This indicates account number of the member who was paid a referral fee for referring this member.
Others	
Gold Card?	Yes indicates the member purchased a 2001 foundation Gold Card entitling them to lifetime reduced transaction fees and a higher facility limit.

g. Payment Info:

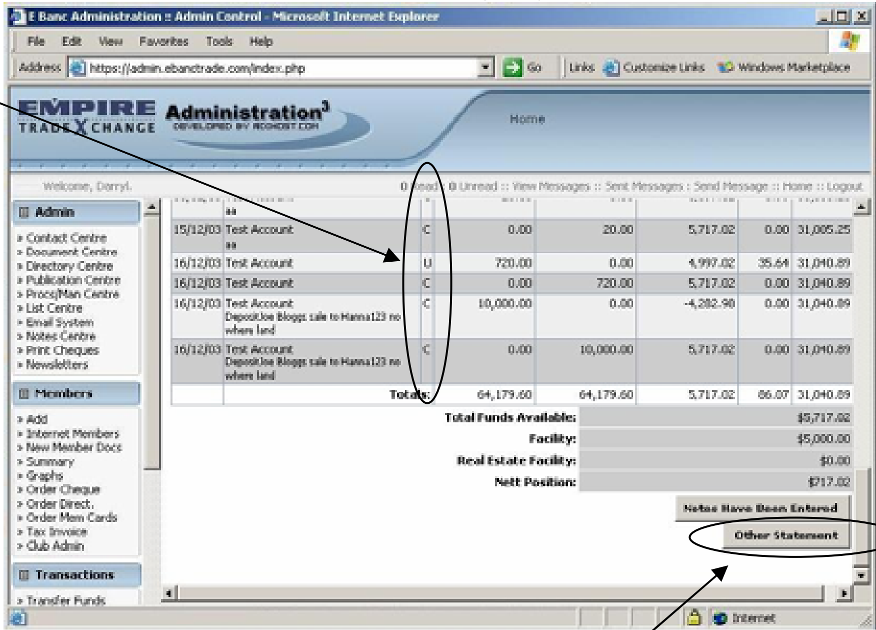
Under **BPAY Details** the BPAY Biller Code and Customer Reference is displayed.

Payment Details displays account payment arrangements such as Payment Type, Payment Account name, Account Number and Expiry of Credit or Debit Card. Staff with the appropriate access can update the member's payment information.

h. Statements:

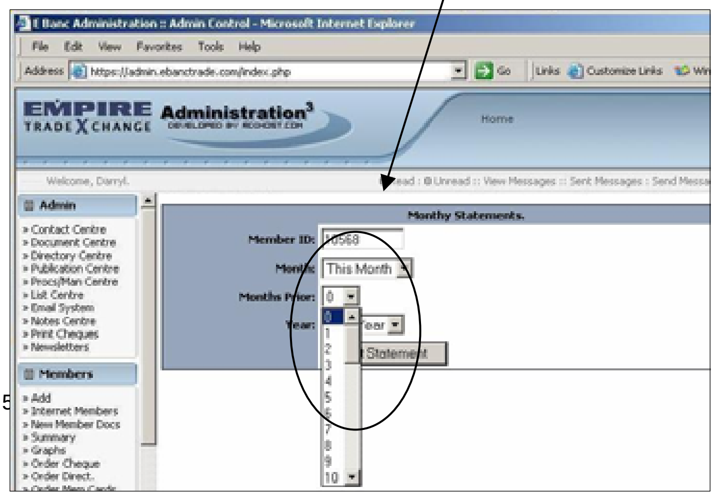
By selecting Statement, this will bring up a summary of the current month's account. Regional Agents and staff members can only see the statements of the members in their agency area.

'C' or 'U' after the transaction details indicates either Cleared or Uncleared funds. An authorisation number simply confirms there are adequate funds in the purchaser's account to cover the transaction and funds show as Uncleared "U". Funds will not be cleared to the Seller's account until the original, signed cheque is received at Head Office for processing at which time the funds will show as cleared "C"



Clicking on 'Other Statement' gives you the option to view the account transactions up to the previous 93 months.

You can select how many months of transactions you wish to view from the 'Months Prior' drop down box.

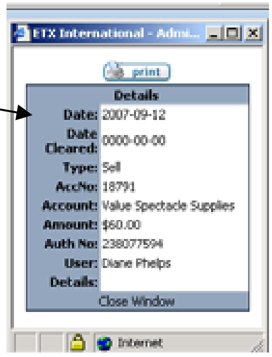


The Golden Rule

Bringing up the previous months statements, gives you the full trading history of the member, showing all transactions. When we refer to the "Golden Rule", we mean that to fully assist with a member's enquiry, we need to bring up the entire transaction history. This gives us a more complete picture of the member's activity and a better understanding of their trading habits.

The Statement displays the following:

Date	Account	C	Buy	Sell	Trade Bal	Cash Fees	Cash Fees Owing
	Opening Balance:				72,742.32		5,135.90



Date: Date of transaction.

Action: By clicking on the date, a pop up window will open displaying the details of the transaction including the authorisation number.

Account: The account name of the other member in the transaction plus a brief description if included.

Action: Clicking on the Account name will open that Account. To open the account in another window, hold the Shift key down while clicking.

C: **'C'** indicates the transfer is cleared funds and '**U'** is uncleared funds, usually because the cheque slip for a phone authorisation has not been received at Head Office for processing. *See also below.*

Buy: The amount of the transaction when the account holder is the buyer.

Action: Clicking on the transaction amount will allow you to reverse the transaction. This reverses the transaction and any cash fees incurred in both accounts (buyer and seller) and includes a transaction description. *This function is only available to National Agents and Super User status.*

Sell: The amount of the transaction when the account holder is the seller.

Action: Clicking on the transaction amount will allow you to reverse the transaction. This reverses the transaction in the seller's account and the transaction amount and any cash fees incurred in the Buyer's account and includes a transaction description. *This function is only available to National Agents and Super User status.*

Trade Balance: The running balance of the account at the date of the transaction.

Cash Fees: The cash fees incurred by the transaction. A **'-'** in front of a cash fee amount indicates a cash fee payment or a cash fee reversal.

Cash Fees Owing: The running balance of cash fees owing.

The statement Summary at the bottom of the screen displays:

Account Balance: Displays total funds in account, both cleared and uncleared.

Total Funds Available: This displays the total funds available in the account. Uncleared funds are not included.

Facility: The amount deposited to the account as a goods and services facility (loan).

Real Estate Facility: The amount deposited to the account as a real estate facility (loan). At the end of each month, cleared funds available in the account, over and above the goods and services facility amount, are transferred from the account to repay and reduce the real estate facility.

Nett Position: The balance of the account excluding any facilities. If a negative balance, this is the amount the member owes the exchange.

Totals:	0.00	0.00	2,132.88	0.00	0.00

Account Balance:	$2,132.88
Total Funds Available:	$2,132.88
Facility:	$5,000.00
Real Estate Facility:	$0.00
Nett Position:	$-2,867.12

i. Actions:

(*These actions are mainly restricted to National Agents and their nominated admin staff*)

- **Create Mail**
  This facility allows you to prepare member correspondence using the official template with the member name, address and details drawn directly from the database. All correspondence may be logged under Mail Log by selecting ‘Save’. This is also recorded in the member’s Notes. The following standard letters are available. You can generate your own letter by using “Blank”.

  - Blank
  - $11 Administration Fee Option Confirmation
  - $11 Monthly Administration Fee
  - Change of bank account details
  - Close of Account
  - Close of Account with Trade Credit
  - Close of Account with Trade Debt
  - Close of Business
  - Close of Business with Cash/Trade Debt
  - Deactivated Account
  - Debt Settlement Offer
  - Dishonour
  - Facility Approval
  - Facility Declined
  - Facility Owing
  - Facility Reduction
  - Inflated Prices
  - Insufficient Funds
  - ITT Required
  - Overdue Fees - 30 Days
  - Overdue Fees - 45 Days
  - Overdue Fees - 60 Days
  - Promissory Note
  - Rejected Credit Card Transaction
  - Uncontactable Member

How to Create Mail

Open the 'Action' section (the text links at the top of the member Edit Screen) when you have a member's account open on the Intranet. You have access to 'Create Mail' that can be printed and mailed to the member whose account you have open, or emailed to the member from within the ‘Actions’ screen.

The benefit of sending your mail via the 'Actions' screen is that legal or administrative correspondence can be logged to the Member's account by ticking the 'Save' button and it can than be reopened from their 'Notes' programme for follow up or further action. You also can be assured that the most current address or email address is used when sending your correspondence as it is drawn from the live database.

The number of options you have under 'Actions/Create Mail' will depend on your Intranet Access level. Most staff and agents will only have the 'Blank' choice. This means you need to create the content of your letter/email. National Agents and country head office staff will have all or most or the standard letters listed above, as well as the 'Blank' option.

Creating a Letter
When writing a letter you do not have to include the member's address or the date. These will be added automatically. You have the choice to include 'Stationery'. You tick this box if you are printing the letter on blank paper. The Letterhead image will be included on the printout. If you are printing the letter on pre-printed letterhead, do not tick the 'Stationery' box. Ensure 'Letter' and 'Preview' are ticked before pressing 'Go'. You can review your letter which will display on your screen as a PDF. If you need to make any corrections, you can go back to the intranet screen, make your changes, then when satisfied your letter is correct, untick 'Preview' before clicking on 'Go'. Your letter will now print and can be mailed.

The attachments are not available though when creating a letter. All these documents are available to you from other areas of the Intranet. You will need to print them out separately before mailing your letter.

Creating Email
Tick 'Email' when creating an email to your member. You have the ability to attach a form or list to your email correspondence. Once you have created your email, tick the corresponding box to attach the form or list (Classifieds or Real Estate) you wish to send to the member. You do not need to add the member's email address. It is drawn from the database. **Note**: There is no preview function when you send an email, so check for errors before clicking on 'Go'. You will also receive a copy of the email you sent to the member.

Saving Correspondence
While it may be convenient to use 'Create Mail' when communicating with members, it is not always necessary to click 'Save'. Only select this option if the letter is of an administrative or legal nature and record of your communication may be required at a later date. General correspondence should not be saved. Ticking the 'Save' box will log the mail to the member's Notes, and also to the Mail Log. The correspondence can be reopened via the entry in the Member's Notes.

- **Open Second Account**
  (*National Agents only*)
  Opens the add member page with common fields already populated.

- **Complaint**
  Opens the complaints form. This is completed by a staff member and logs a complaint received from the member.

- **Fee Payment – Cash**
  (*National Agents only*)
  Process a cash payment to the member's account

- **Fee Payment** – **Credit**
  (*National Agents only*)
  Process a credit card payment to the member's account

- **Fee Reversals**
  (*National Agents only*)
  Process a fee reversal against the member's account. This is a reversal of a fee logged to the member's account, but not yet paid. This could be used to reverse stationery fees, or administration fees for example.

- **RE Fee Payment**
  (*National Agents only*)
  Process a Real Estate fee payment to the member's account

- **RE Fee Reversals**
  (*National Agents only*)
  Process a Real Estate fee reversal against the member's account

- **Add Fees**
  (*National Agents only*)
  Processes a manual adjustment of fees; i.e. add stationery fees, or a fee for a directory.

- **Transfer Fees**
  (*National Agents only*)
  Processes a transfer of fees to another account. Most often used when a member has two accounts and one is being closed. The fees can be transferred to the account remaining open. Also can be used when a member sells their business to another member with the trade account (balances and fees) as part of the sale.

- **Dishonour Reversal**
  (*National Agents only*)
  Process a fee reversal when a cheque or CC payment has been dishonoured; or process a reversal of a paid fee (usually a reversal of an entry logged in error).

- **Facility – Goods and Services**
  (*National Agents only*)
  Establish or increase a facility amount. The amount you enter is the total amount of facility, not the additional amount or reduction amount. When taking all the facility from an account (check there is enough balance in the account first), put 0 in the 'New Facility' field.

- **Facility – Real Estate**
  (*National Agents only*)
  Establish or increase a facility amount by putting the (new) full amount in the 'New Facility' field.

- **Conversion**
  (*National Agents only*)
  Process a barter currency conversion by inserting the amount to be converted, selecting the Barter currency company and selecting 'Go'. You can adjust any fee percentage in the next screen to display before completing the conversion.

- **Tax Invoices**
  When you wish to view and/or print a member invoice, select the appropriate month and year, tick the Stationery Box and select 'Get Tax Invoice'. You can select multiple months if required. When printing onto pre-printed tax invoice stationery, you do not need to tick 'Include Stationery'. If you wish to email a tax invoice to the member, again select the month and year you require, then select 'Email Tax Invoice'.

- **Statement**
  Generate statement which can then be printed or emailed. You can select one month, or multiple months and have the option to include stationery (when printing on plain paper) on not to when printing on preprinted statement sheets.

- **Order Cheque book**
  Order a cheque book on behalf of a member.

- **Order Directory**
  Order a directory on behalf of a member. You can select a national or state directory.

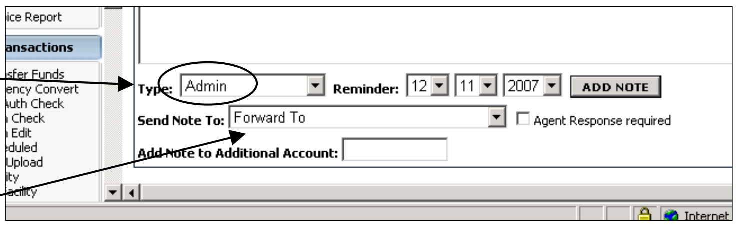
- **Order Member Card**
  Order extra or replacement membership cards

- **Add Classified**
  Add a classified item to the online Classifieds on behalf of a member. By adding the classified from inside the member account, the contact fields will be pre-populated.

- **Deactivate Account**
  (*National Agents only*)
  This option will allow you to carry out the process necessary to deactivate and account.

j. Notes:

- **Notes** allow for member information to be stored on the intranet against a member's entry and accessed from the member's screen, or the directory listing when you use the search function.
- These member notes can be seen by all staff (with admin access) and Agents. New notes can be revised by the person who placed them, but only on the day that they were entered. Notes older than a day cannot be edited.
- By including notes on member activity, all Empire Trade staff and Agents are kept up to date with the status of the member's trading activity and avoid duplicate requests. Communication is one of the keys to great customer service.
- This "N" displays to the right of an entry when you do a directory search. You can also access notes by clicking on 'Notes' at the top of the member's details page. Notes on a member account are only viewable from the intranet and not from the corporate website
- **Notes by Category**
  - The Notes Programme is categorised by subject matter.
    1. **Admin**: Administrative information about a member that needs to be communicated to all staff and Regional Agents, i.e. they are in breach of the rules and regulations; they are not to be issued with cheque books; account information such as a bar on funds transfers between accounts; business sold etc. This is where relevant information is recorded that needs to be known to everyone.
    2. **Member Support:** This is used from the perspective of a Member Support Officer and is where you can record anything that assists the Member Support staff to better meet the needs of the member, i.e. goods they are seeking; problems they may be having; brief record of relevant conversations; temporary suspension of trading; trade component: etc. This is normally the most extensively used and assists us to serve our members more efficiently.
    3. **Real Estate**: This is where the Real Estate staff can record relevant information that is then available to everyone, i.e. property settlements; members enquiries about a certain property; when a member has been shown a property; and if a member has informed us that they are looking to buy property
    4. **HQ Note**: (for *National Agents only*)
- The text links at the top of the notes box indicates how many notes are logged against each of the subject areas.
- Simply select the view you wish to read. All notes can be viewed by choosing "View All".
- <u>**It is important to remember**</u> that each time you enter a member note you need to identify which area it belongs before clicking "Add Note". Simply select the appropriate note type from the drop down menu



- **Forwarding Notes**
  - You can forward a note to another staff member or agent by selecting their name from the drop down box at the bottom of the Notes screen. When you select "Add Note", it will forward a copy to the selected person.
- **Saving Notes to a Second Account**
  - You can add a note to one other account by adding the 2nd account number to the field box titled "**Add Note to Additional Account**". This may save you time by avoiding duplication. To access this function, you must be in the member account. It is not available by clicking on "N" from the directory list of members.
- **Reminders**
  - You can also set yourself a reminder in the Notes system, which will alert you on the day you require to act on the member's account. Simply select the date of your reminder before selecting

“Add Note”. On the morning of the date you specify, you will receive an email that will remind you of all the tasks you have identified for that particular day.

- You can also view all notes you have personally entered to the system by selecting ‘**Notes Centre**’ from the left side text links under ‘**Admin**’. This will display all your current reminders. As you complete the reminder task, tick the box at the end of the reminder and select 'Mark as Completed'.
- This function provides a great memory jogger when you are talking to members, or trying to find information you know you placed on the system, but just can't remember against which member it was logged. You can also view past notes you have entered by selecting the text link 'view past notes' at the top of the screen, then selecting the month and year you wish to view.

- **Response Required Function**
  (*Initiated by National Agents and Head office staff only*)
  - This works within the Notes & Message systems to keep track of requests for action sent to Agents or staff. Only those staff with Level 2 access can enter a 'Response Required' Note. Typically this will be National Agents, staff with full admin access and Managers at National Head Offices.
  - Where action on behalf of a particular member is required, the request can be entered in that member's Notes and it is sent via the message system (also logged to the member's notes) to the agent or staff member who is required to action the request. This function is only to be used for a specific action required for that member's account. It must be appropriate to be entered into the member's notes because these notes can be accessed by the member under the Freedom of Information Act in Australia and most probably under similar Acts in other countries.

  Process
  - A request is posted to the notes of a specific member account. Before 'Adding the Note' the sender also selects the person who needs to act on the request in the "Forward' field, and also places a tick in the box labeled 'Response Required'.
  - The request message is displayed on the member's account and the agent or staff member to whom the note is forwarded is notified via the message system that an action requiring a response has been forwarded to them regarding member account number xxxxxx. When the agent or staff have completed the request, they open up the original message, select 'Logged Response', enter the response message, then click on 'Send Message'. This will enter the text of the message as a Note in the relevant member's account, and also reply to the original sender to confirm the required action has been taken.
  - Those agents and staff with the relevant access can 'Track' these messages from the Note Centre. By selecting the text link 'Track' from the top of the 'Note Centre' screen all the notes you have entered that require a response from an agent or staff will be listed, plus any responses that have been made. You can keep these entries, or delete them once they have been actionned.
  - The agent or staff can choose to reply to the message without it being submitted to the Member's Notes by clicking on 'Reply' rather than 'Logged Response'. This would be relevant if more information was required in order to complete the task as this type of message would not be suitable in the member's notes. A 'Logged Response' can be entered at a later date if required.
- This Notes system is **not an appropriate means of communication between staff**. If you wish to communicate with staff, use the Message System. If you wish to leave Notes about a member for other staff and Regional Agents to see, use the Notes system.
- **Notes Report**

  The Regional Agent will receive an email at the end of each working day with a PDF attachment displaying all notes entered during the day to the accounts of members in their area.

IMPORTANT
Always remember that under Freedom of Information Legislation, members may have the legal right to request to see all information stored about them, and this includes the Notes system, so please use common sense when entering information that may be considered sensitive, inflammatory, or in bad taste.

We cannot make statements on the Notes system about issues where we do not have all the facts or are going on hearsay. If unsure when entering notes, enter a simple note such as: Please contact '<u>Your Name</u>' before dealing with this member.

Notes can be viewed by type (Admin, Customer Support, Real Estate, HQ or All). The number in brackets after each note type indicates the number of notes entered to that type. The add notes and set up reminders function has not changed.

k. History:

Displays a summary view of monthly account activity for the past 12 months.

l. Mail Log:

This will display all the mail (both hardcopy and email) generated to this member through the intranet system.

m. Log:

This function is available to National Agents and by special request to other staff and Regional Agents. It lists what has been changed on a member's account, the date the change was made, and who actioned the change. The log also displays which staff have accessed or viewed the member's account, and on what date.

6. Colour Indicators

A member's account status with regard to outstanding fees is **displayed on the intranet by colour bands**.

Each colour indicates how many days outstanding the payment is and at what stage the account is in our debt recovery process.

a. Debt Recovery Process

Empire Trade takes pride in offering affordable and equitable fees and charges to its membership base. However we rely on this income to cover the administrative costs of the exchange and while we try to assist members who are behind in paying their fees, if members make no effort to meet these obligations, we will make use of our legal department to recover fees.

When a member's account has been in debit for more than 30 days, and the balance owing is $100 and over, an automatic recovery process is initiated. The member's agent is advised by email who then calls the member with a gentle reminder that their fees are overdue.

If payment is not received within 15 days, a letter is forwarded to the member requesting payment within 14 days.

If the account remains unpaid after this 14 day period, a second letter is forwarded requesting payment within 14 days and advising that the account has been suspended until the outstanding fees are paid. At this stage the member can still earn trade dollars, however they cannot spend them. This letter advises that if payment is not received, the outstanding trade credits on any facility attached to their account will also be repayable in Australian dollars.

We value our members, and wish to ensure they remain with the exchange, so all members who have received a second letter are given a courtesy call by a staff member from Head Office.

The member will be offered alternatives should they be experiencing financial difficulty and every attempt is made to avoid further legal action.

Should the member be uncooperative, they are advised that if payment or further contact is not made within 14 days, the matter will be passed on to the legal department for further action. The member's licensee is notified and has the opportunity to call their member to follow up on payment.

If fees remain outstanding after this 14 day period, a third letter is forwarded to the member advising them that their account has been terminated and they are to refrain from any further trading. The member is requested to pay all outstanding fees, plus any facility amount owing which is now due and payable in Australian dollars. The member is also advised to contact Head Office within 7 days to avoid legal action being taken to recover outstanding fees and costs. At this point, staff at national head office attempt to call every member who has received this third letter to discuss payment options.

If this seven day period expires without payment being received, or a repayment plan being implemented, the member's account information is forwarded to our solicitors to initiate legal action.

b. Colour Indicators Explained

Status Codes:

Full explanation in the "Guide to Using the Intranet" under Procs/Man Centre, Manuals, in the Admin section of the Intranet.

A: Active account
C: Contract account
S: Staff account
P: Sponsorship account
D: Deactive account (Closed)
U: Suspended account
L: LISTED in directory
N: NOT listed in directory
T: Temporarily unlisted

Colour Codes:

Red: Fees are overdue 30 days no letter sent.

Green: Fees are outstanding 30 days 14 days after being red lined, first letter sent.

Blue: Fees are outstanding 45 days 14 days after being green lined. Second letter sent.

Violet: Fees are outstanding for 60 days 14 days after being blue lined. Third letter sent.

Yellow: Account is Suspended and Locked

Note: While the above letters are sent out from each country's head office, Regional Agents and their staff are encouraged to follow up with members who are behind in the payment of their fees.

Red: Indicates a member's fees are overdue 30 days but no letter has yet been sent. The member's Regional Agent is notified of the overdue fees and requested to contact the member to request payment. This is also the Regional Agents opportunity to advise head office not to proceed with the fee recovery process if they have made other arrangements with the member.

Green: Fees are outstanding for 30 days
14 days after being red lined, a letter is forwarded to the member requesting payment within 14 days. Member is encouraged to call to make alternative arrangements if experiencing financial difficulty.

Blue: Fees are outstanding for 45 days
14 days after being green lined, a second letter is forwarded requesting payment within 14 days and advising that the account has been suspended until the outstanding fees are paid. Member is again encouraged to call to make alternative arrangements if experiencing financial difficulty. Member is advised that if payment or contact not made, the matter will be passed on to the legal department for further action, and the outstanding trade dollars on any facility attached to the account will be repayable in Australian dollars. The Regional Agent is again notified and has the opportunity to call their member to follow up on payment prior to legal action commencing.

Violet: Fees are outstanding for 60 days
14 days after being blue lined, a third letter is forwarded advising that the member's account has been terminated and they are to refrain from any further trading. The member is requested to pay all outstanding fees, plus any facility amount owing, now due and payable in Australian dollars. Member is advised to contact Head Office within 7 days to avoid legal action being taken to recover outstanding fees and costs.

Yellow: Account is Suspended and Locked

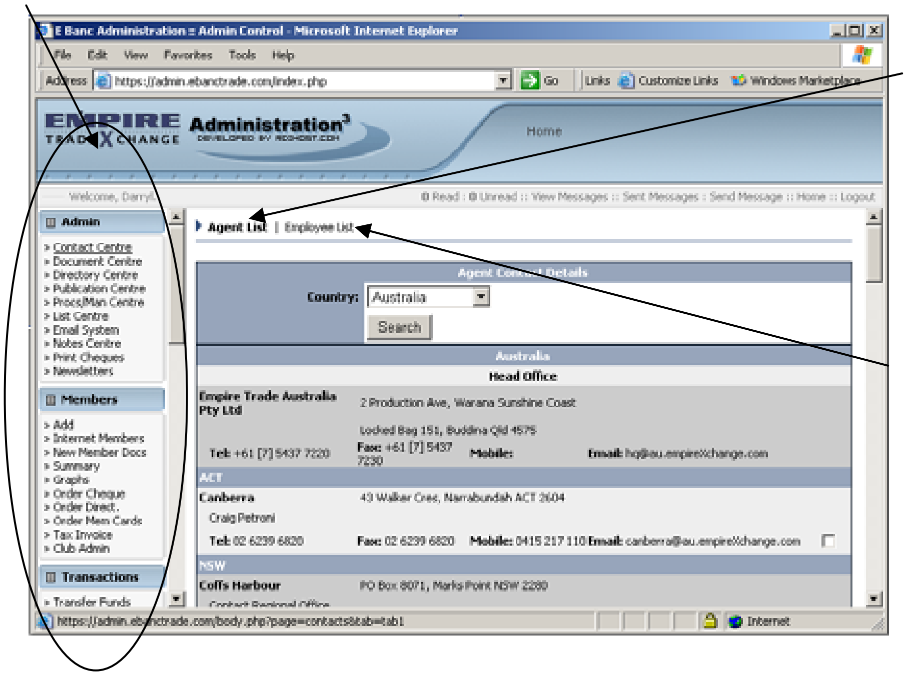
This indicates that the member account has been locked and forwarded to the Debt Recovery Department for further action.

Note:
While the above letters are sent out from each country's head office, Regional Agents and their staff are encouraged to follow up with members who are behind in the payment of their fees.

IV. Left Hand Navigation Table

ADMIN

1. Contact Centre



- **Agents List**
Gives you the ability to download an up to date list of all Regional Agents and their full contact details by country or around the world. Select the country you want, then 'Search'. If you wish to print the list, scroll to the bottom and select "Get PDF Version'.

- **Employee List**
Lists all Exchange staff by country, state and Agency Area. Two tick boxes may be available for each staff member. Ticking the box headed 'Acc' will suspend the staff member's access to the Intranet.

If the staff member is designated as a Sales Consultant, a second tick box will appear under the SP heading. Ticking this box will remove the staff member from the list of Sales Consultants. *This tick box feature is only available to National Agents and authorised Head Office staff.*

2. Document Centre

The document centre allows you to download all the necessary documents, forms and information. These are updated regularly so they should not be saved to your computer, but always accessed from the Intranet.
The document centre includes tabs to:

- **Forms**: General Forms
- **Stationery**: Staff email template; Regional Agent's individual letterhead; with compliments; and fax header.
- **Application Forms**: Membership application; Club applications; membership application guides; National Trading Rules; and Real Estate Agreement Form.
- **Services**: information on the Advertising Subsidy; Virtual Mall; and other current services.
- **HR**: Forms relating to employment with the company and in some instances, only relevant for Head office Staff.
- **Product Orders**: Ordering system for business cards, promotional products, publications, and sales products. See 2.a below for more detail.
- **Sponsorship**: Sponsorship Guidelines; application; and funding agreement.
- **Member Support**: documents to assist staff when contacting and supporting members.

a. Product Online Ordering

Introduction

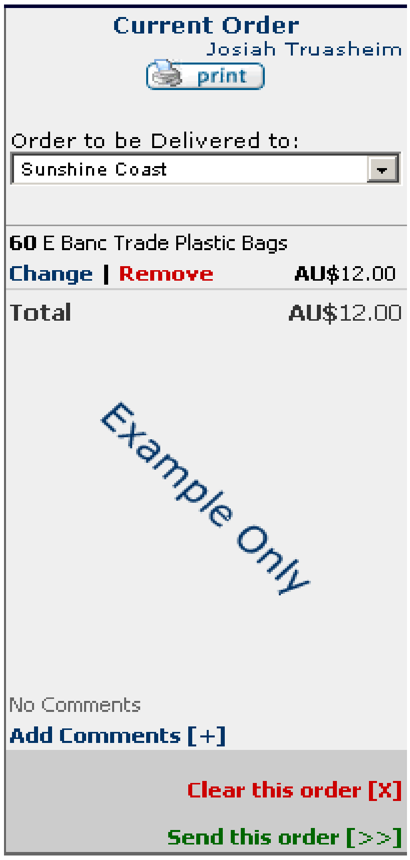
The product ordering system was designed to assist Empire Trade Regional Agents to obtain Empire Trade products and promotional literature. This tutorial file will assist Regional Agents and Staff to use the system accurately and is also available online from the Help System.

Main Menu

The main menu is always present at the top of the product orders system; this is designed to be an easy way for you to navigate between past and current orders. There are three tabs in the main menu; "View Past Orders", "Current Order" and "Help & Support". The "View Past Orders" tab will display the past orders screen. For more information on this screen visit the' **Past Orders'** section of the support guide. The 'Current Order' tab will display your current unsent order. The 'Help & Support' tab will display this Support Guide. Do not hesitate to use this if you are ever unsure of the process.

The Order Panel

In Current Order view, the order panel (on the right) displays the order that you are currently preparing or modifying, in summation form. To the right is a sample order panel.



The panel is titled according to the order that you are modifying. For the example we are using, this is our current unsent order, and is thus titled "Current Order". If we were modifying an order that we had already submitted, the order panel would be titled 'Order # **[num]** '.

Under the title, the name of the person who sent through the order is displayed. e.g. "Josiah Truasheim" is ordering this order.

By clicking the print icon, you can print out your current order.

The select box under the print icon allows you to select where you would like the order to be delivered. To change this, simply click the down arrow to the right, then scroll to the area you wish to select. (Only an individual's licensed area will display. Mulitple areas are listed alphabetically).

The products that you have ordered are displayed below the area select box. Each product will display the quantity that you have ordered (in bold), the name of the product, and the amount that you will be charged for that quantity of product. To make modifications to the quantity of a product, click the **"Change"** link. This will bring up the item's ordering screen, allowing you to modify it. To remove a product from your order, click the 'Remove' link.

The total cost of the order is displayed below the list of products in the order panel.

The comments status displays below the products and total. When you have no comments entered, the status is **'No Comments'**. When the status says 'Comments Added' this indicates that you have added comments to your order. Below this is a link that will let you add/change the comments attached to the order.

The **'Clear this order [X]'** link will remove the order that you are working on from the system. This is permanent; you will not be able to retrieve this order.

The **'Send this order [>>]'** link will send your order to Head Office for processing. This link will not appear if you are modifying an order that you have previously sent. Any changes you make to an order previously sent will be notified to Head Office in the form of an email and all changes will display on your screen. There is a 24 hour pending period in which you will be able to change your order.

The Products Panel

The products panel (located on the left) holds all the products that are available to order. The category select, located at the top of this panel, allows you to jump between the different categories of products available. To change your category, simply click the down arrow on the right then select the category that you wish to edit.

There are two ‘special’ categories in the category select; ‘Business Cards’ and ‘Comments’. For more information on these categories select the **Business Cards & Comments** section of this support guide

In a normal category, product boxes like the ones to the right will appear.

If the category that you are viewing contains any products that you have ordered (for example our plastic bags) they will appear in a blue box with the quantity that you have selected.

Other products available, that you have not ordered, will display in a grey box.

The product box lists the product name and the ‘Change Order’ / ‘Add to Order’ link. On the second line you will find the price of the products per unit, the quantity entry box, and the calculated total for the quantity of products that you enter. Remember to click the ‘Change Order’ / ‘Add to Order’ link, to add to or change your order.

> **Warning**
> If you enter a quantity for a product, and do not click the ‘Change Order’ / ‘Add to Order’ link, the order will **NOT** be added. You **MUST** click the ‘Change Order’ / ‘Add to Order’ link for **EVERY** product that you would like to add to or change in your order.

The bottom of the product orders box contains 3 more things: The price of the products per unit, the quantity entry box and the calculated total for the quantity of products that you require.

Comments
The comments section is where you can provide additional instructions with your order. To add or change the comments for your order, simply type your comments in the box provided, then click the ‘Add Comments’ / ‘Change Comments’ link in the bottom right.

Business Cards
The business card selection system is accessed by selecting ‘Business Cards’ from the category select box. There are four steps to ordering business cards. All orders for business cards must be pre-approved by the individual’s Regional Agent/Supervisor.

The area selection box to the left displays all areas belonging to a Regional Agent or their staff. Select the appropriate area for your order. Multiple areas are listed alphabetically.

When you have selected an area, the Staff member selection box will display the staff from the selected area. Select the staff member that you wish to order cards for from this box.

After you have selected a staff member you then select the required quantity from the Quantity selection box.

If you wish to add comments specifically relating to the business card that you have selected, enter them in the box provided.

When you have entered the correct information, click the ‘Add to Order’ link to add this business card to your order.

Once the business card has been added to your order it will be visible in the order panel. It will appear similarly to the other products in the panel, bar one thing. Instead of a ‘Change’ link, there is a "View" link that allows you to view a sample of the card that you have ordered.

Past Orders
The past orders menu can be accessed by selecting the ‘View Past Orders’ link on the main menu. This will display the past orders menu. On the left all the orders for your area are displayed. Clicking an order from the list on the left will display a summary of that order in the panel to the right.

When you have selected an order to review, click the ‘Select Order >>’ link at the bottom right. This will load the order that you have selected. The status of filled orders will be displayed. These filled cannot be modified.

Note: Orders that have a grey background have been filled; orders with a white background have passed their pending period and will be sent to you shortly (these orders cannot be changed); orders that have a blue background are in the pending period and can still be modified.

You will receive an email confirmation that your order has been received at Head Office. At this stage you have until the close of the next working day to make any necessary changes or to cancel your order by contacting the Receptionist via email to reception@au.empireXchange.com or by phone 07 5437 7220.

After this pending period, your order will be processed and the charges assigned to your account.

Product charges are listed below, as well as on the ordering system screen. All new Regional Agents receive a start up kit that includes membership books, sales presentation kit, business cards and brochures. There is no extra charge for this. The charges below apply to repeat orders only.

These charges cover the base cost, cash component only. Head Office will absorb the trade cost.

Business Cards	
set of 250	$25.00
set of 500	$45.00
Membership Books	$0.00
Multiple Purchase Vouchers	$0.00
Directories	
Part 1-Qld mailed	$5.00
Part 1-Qld pick up	$2.00
Part 2-Other States mailed	$5.00
Part 2-Other States pick up	$2.00
States other than Qld mailed	$2.00
National mailed	$10.00
National pick up	$5.00
Trifold Promotional Brochures	
1000	$100.00
500	$50.00
Sales presentation Kits	
Bound Set	$25.00
Inserts only	$15.00
Corporate Presentation Folders	$1.70
Chambray Shirts	$13.80
Embroidered Empire Trade Caps	$3.50
Screen Printed Plastic Bags	$0.20
Stickers	
Bumper Stickers	$0.20
Large Stickers 380 x 20	$1.35
Medium Stickers 250 x 70	$0.40
Small Welcome Here Stickers	$0.25

3. Directory Centre

The Directory Centre allows you to download a specialized **Mini Direc**tory or **Custom Directory**, plus you can also download the current **Classifieds**, **Real Estate Listing** or **New Members** over the past 30 days.

a. New Member Lists

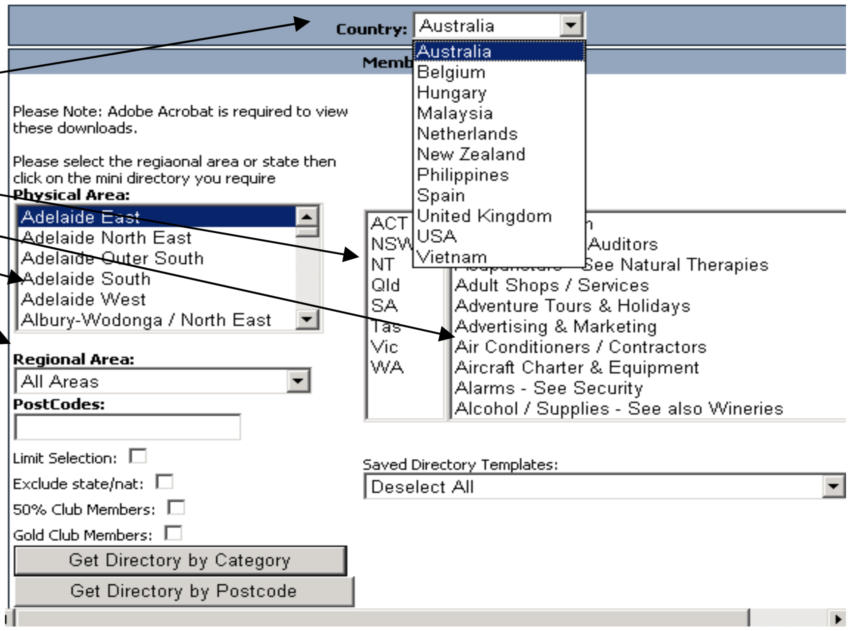
There are two new members list available:

- Last 30 Day's New Members including Unlisted – (NOT TO BE GIVEN TO MEMBERS)
- Previous Month's New Members: Listed Members ONLY – (Can be given to Members)

b. Directory Selection

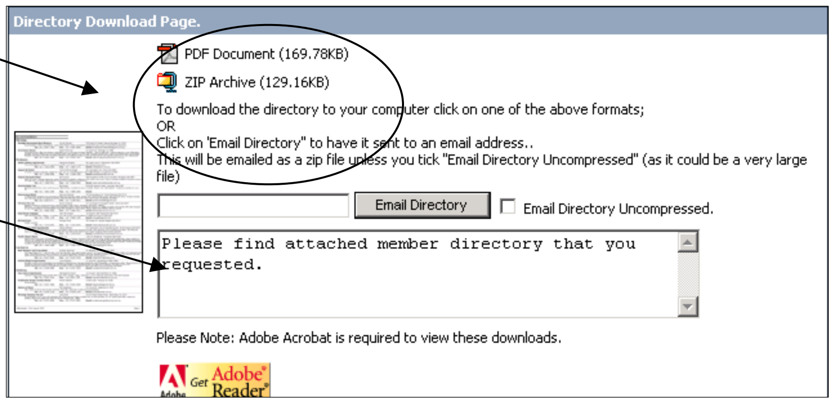
You can select the membership directory by:

- Country
- State
- Category
- Physical area
- Regional area
- or a combination of area and category



After making your selection you can choose to receive your directory ordered by Category, or by Postcode.

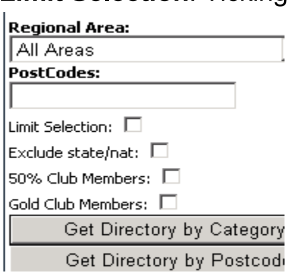
You then have a further option to receive this document as a PDF; as a Zipped file; or you can choose to email this directory directly to a member as a PDF or Zipped file. You also have the options to send a personalised email message with the Directory.



c. Other Selection Options:

- **By Postcode**: You can download a postcode specific directory by typing the postcodes you require into the field box directly below 'Regional Areas'. Postcodes must be separated by a comma.

- **Limit Selection**: Ticking the 'Limit Selection' box allows you o further refine your search to those members you are seeking. For example, if someone would like a list of B&Bs, you choose the Accommodation category, then tick 'Limit Selection'.



The list that displays then allows you to discard those members in your list who are not B&B before printing or emailing your list. Simply untick the box beside those members who don't meet your criteria. Please note this function is not to be used to promote some members over others, simply to provide a more relevant list. All members are entitled to be promoted equally – this is the service we offer through their membership.

- **Exclude State/Nat**: Some members can trade statewide or even Australia wide. These members are included in directory lists outside their regional or physical areas. Ticking the ‘Exclude State/Nat’ box will ensure these members are not included in your list.
- **50% Club Members**: By ticking the ’50% Club‘ box your list will only bring up those members in your selected areas who are members of the 50% Plus Club. Ticking both 50% and Gold Club boxes will bring up all club members.
- **Gold Club Members**: By ticking the ‘Gold Club’ box your list will only bring up those members in your selected areas who are members of the Gold Club. Ticking both Gold and 50% Club boxes will bring up a list of all club members.

d. Saved Directory Templates

This function allows you to save a specific Directory that you may wish to use again. It saves the category selection only; not any ‘Limit Selection’ changes you may have made, nor does it save the area choices. To bring up this directory template again, select the name you gave the template from the drop down box.

e. Mini Directories

We have grouped some commonly searched categories into Mini Directories such as ‘Contractor’, ‘Restaurants and Accommodation’, or ‘Wedding Services’. You can bring up a national Mini Directory or restrict is by Regional Area, or State. For example: the Contractor Directory will include all members whose product or services can be used in the building industry. By Clicking ‘Get Directory’ you will be given the option of downloading the file as a PDF or in a Zipped format, or emailing the PDF or Zipped file to a member and including a personalised email message.

4. Procedures and Manuals Centre

Displays procedures that are part of our business management system certified to ISO9001 international quality standards. User Guides and Training Manuals are available and Admin Updates allows you to view current and past information on minor procedural changes and updates to services. The Help System provides easy step by step training on how to perform certain tasks and services.

a. Procedures

The procedures that form our Management system and ISO9001 accreditation are available under relevant categories. Ensure you are familiar with those procedures appropriate for your position.

b. Manuals

Regional Agents and staff can access these in depth manuals that cover all facets of the Empire Trade operation. These manuals, particularly the Guide to Using the Intranet, are under regular review and updated as changes are made to the online system.

- **Guide to Using the Intranet**: This document explains how to use all the functions provided by the Empire Trade Intranet system.
- **Member Support Manual**: This document provides all the information you need to actively support your members.
- **Agent’s Manual**: This document provides the Agents with the knowhow to set up and run a regional Agency.
- **Sales Presentation**: This is the presentation sales consultants give to prospective members
- **Guide to the Sales Presentation**: This document gives you tips on using the Sales Presentation to its best advantage.
- **Sales Training Manual**: this documents give the agent the information necessary to provide training to sales consultants.

- **Member's Manual**: This document can be given to new members to assist them to make the most of their trading and education them on the services and functions available to them online and from member support.

c. Admin Updates

As our systems are constantly being reviewed and upgraded, the manuals do not always have the latest information. As systems are upgraded or functions added, agents and staff are advised by email. This important information is then loaded to the Admin Updates programme so that authorised users are able to obtain the latest information about our systems and programme changes.

This information is displayed by Year and month and date order, and can be searched by keyword. For Instance, if you wish to find the latest information issued on the administration fee, type 'administration fee' into the search field and click on 'Search'. All entries that refer to the administration fee will be displayed in date order from the most recent to the oldest. If information is conflicting, the most recent entries will be currently correct.

d. Help System

This section provides mini tutorials on how to perform certain actions.

- Loading a Newsletter: step by step tutorial on how to load a newsletter to the Corporate Site available to National Agents and approved staff
- Product Orders Manual: Explains how to use the Product Ordering system
- Sending Bulk Emails: explains how to create, check for spam and send emails to your members using the List Centre.
- Setting up your Empire Trade Email Address: Explains how to set up your empireXchange.com email address and send and receive emails using this address.

5. List Centre

a. Get Labels

By Location and Category
This allows Regional Agents to select and print address labels for members in their area selected by location (if you have multiple agency areas) and category (singularly or by groups). This list will include all members located in your agency areas. Ticking the 'Physical Area' box will include those members in your physical area who are under other agents. National Agents have further selection choice by regional area and State/County.

By account number
Individual or multiple address labels can be printed by adding the account numbers separated by a comma (no spaces) into the 'Member List' field box.

By Date Joined
The selection parameters can be further defined by selecting only those members who joined in a certain month or year.

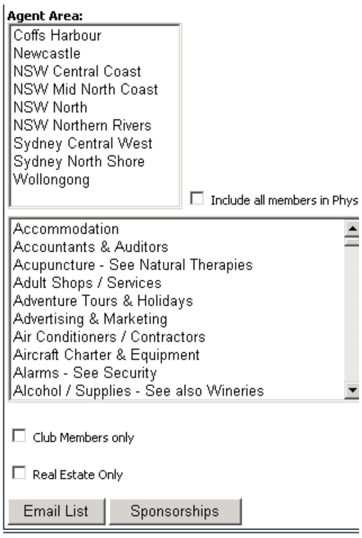
Other Selection Choices
Ticking 'Limit Selection' will allow you to discard those labels in the list you do not require before printing.

The selection can also be restricted to hard copy members (those members who do not have an email address or who have elected to pay the Stationery fee to receive communication by mail): or email members (those members who have an email address on their account and who do not pay stationery fees); or all members in your selected search parameters. Simply select the desired radio button. Ticking the 'Exclude Fax Members' box when 'Hard Copy Members' is chosen brings up only those members on the Stationery fee that do not have a fax number registered to their account.

Once all selections have been made, click the "Get Labels" button and the labels will display already formatted for Avery Labels L7160. You can them print this PDF file.

b. Email List

Regional Agents can obtain the most up to date list of email addresses for members within their agency areas, already formatted for inclusion into their email software packages.



Highlight the areas you want. You must click on your area even if it is the only one displayed.

Refining your selection

Include members in Physical Area: Ticking this box includes those members in a physical area who are not under the Agent for that area. The selection can be further refined by selecting one or more categories.

Club Members Only: Tick this box when sending out emails that are meant for Club members only.

Real Estate Only: If you are sending out an email to your members about property purchase opportunities, make sure you tick the 'Real Estate Only' box. This will ensure that those members who have advised head office that they do not wish to receive emails about property opportunities are not included on the email list you are sent.

Sponsorships: If you wish to contact only those members who have received Sponsorship funding click the Sponsorship button once you have made your other selections.

National Agents have the same selection parameters as above, but they can also select by Regional, Physical or Agency area.

Include all Members: National Agents have the options to send an email to all members, including those who have opted out of receiving promotional emails. If you are sending an email that is administrative or procedural in nature and all members of the exchange need to receive it, tick the '**Include all Members**' tick box. Never select this box if you are sending a promotional email as you may contravene national laws relating to SPAM.

Clicking on the "Email List" or "Sponsorships" button will generate an email that is sent to the email address of the person who is logged onto the Intranet. It will include a zipped text attachment. Simply open the attachment, copy all the emails within the text file, then paste them into the BCC (blind carbon copy) field box on your new email screen. There is a separate guide to preparing bulk email messages to your membership base. You will find it under the 'Help System' in the 'Procs/Man Centre'.
See Section 4.d of this document for more information.

c. Fax Stream List

Regional Agents can obtain the most up to date list of fax numbers for members within their agency areas, already formatted for inclusion into their online fax programme software.

Click on your agency area (**even if there is only one displayed**) then further define your choices by selecting a category or multiple categories. National Agents can also select by regional area.

You then choose between fax numbers for hardcopy members only, or fax numbers for all members who display a fax number. If your fax programme has difficulty faxing phone/faxes, you can deselect them you ticking 'Exclude phone/faxes'. Next, select the format you wish to receive. If you select 'Printable Report', you will receive a list displaying account number, business name, contact name and fax number, including area code. Next select "Go". If you have selected Fax Stream List, the person logged on to the Intranet will receive an email with a text attachment listing all the requested fax numbers.

d. Internal Email List

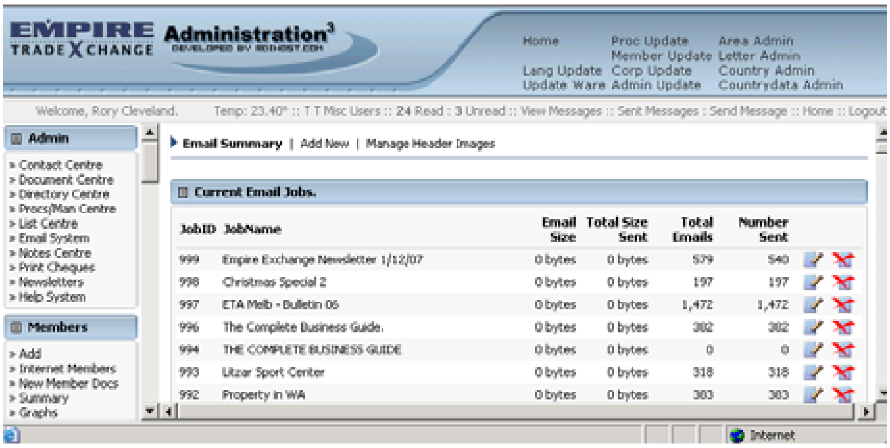
National Head Office Use Only

This is only visible to National Agents and provides agent and staff email addresses by location and position. Either select all areas then tick the email addresses you want, or first select the agency area you require, then tick the relevant boxes, i.e. you can select either or all of Regional Agent, Admin, Member Support, Sales, or Real Estate personnel, or you can select all. By then selecting 'Go', you will receive an email with a text attachment that includes all the email addresses you requested. Simply copy and paste them into the BCC box of your email software package.

6. Email System

This programme allows Regional Agents to compose and send an email or advertising bulletin to their entire membership base, or to their members by category and/or location. Regional Agents do not have access to bulk email the members of other Regional Agents.

National Agents have access to email the national database or restrict it to a regional area or category.



a. Email Summary

Email Summary view displays
Job ID: Each new job generates a unique number ID.

Job Name: this is the name given to the job and does not display in the email.

Email Size: The total byte size of the email to be sent. Make sure this is not over 4000 byte unless a special, one off, graphic heavy, email.

Total Emails: This displays the number of email addresses to which the email will be sent.

Number Sent: This displays the number of emails that actually were sent to the recipients. If this number is different from the Total Emails number, it means some of your emails did not go through. This could be that the recipient uses a free email package and is temporarily over quote, or there may be an error in the email address.

 Edit job: Clicking on this icon will bring the email up in the edit screen so changes can be made to it before it is published.

 Delete job: Clicking on this icon will delete the job.

b. Add New

Follow this process to create an email, Bulletin or Spotlight to send out to your members.

Set Up your Email Job

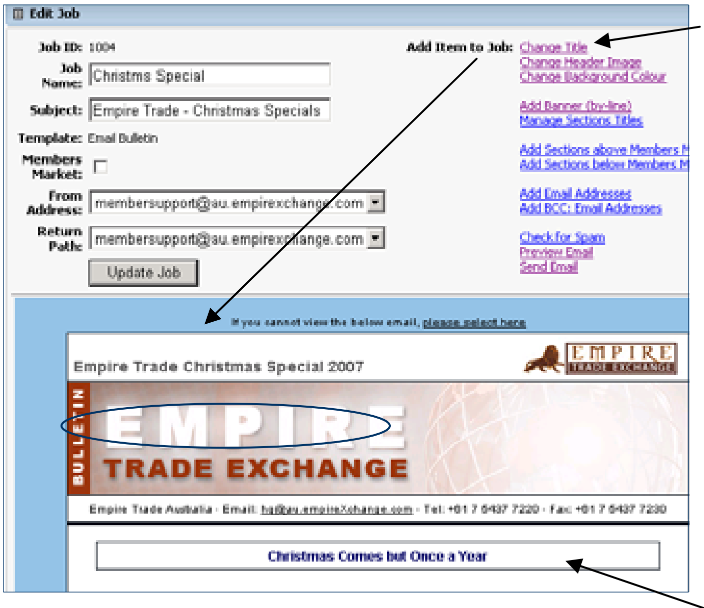
- Create a **Job Name** which is used solely for identification purposes.
- Select a **Subject**. This will display in the subject line of the email received by the recipients. It is advisable to commence each subject line with Empire Trade – this way members can easily identify what the email is about and why they are receiving it.
- Ticking **Members Market** will create a section in your email specifically for Member promotions. This is below the section where you can add administrative information. If you do not need these sections, do not tick the box.
- The drop down box by **Template** allows you to select the type of email you are creating:

- o **Email Bulletin** is selected if you are preparing a promotional email advertising a number of members. This requires selection of Template Data which includes a pictorial header and agency specific contact details.
- o **Email Stationery** will create the email using the email stationery of the person who is logged into the Intranet.

- ▸ The Drop Down box under **Template Data** provides a selection of header images and contact details specific to the bulletin type of regional agency. If your agency area does not appear in the list, please contact
- ▸ International head office and the IT Department will create one. You may supply the image in JPEG format, but this is not a requirement.
- ▸ The email address you select for **From Address** will be the email address that displays to the recipient as the sender's email address.
- ▸ The **Return Path Address** is the email address to which an email will be sent when the recipient clicks on 'Reply' after receiving the email or bulletin.

Once the fields are completed, click on '**Next Step**'. <u>The instructions below apply when you have selected to create an **Email Bulletin** during the set up stage</u>. For instructions when selecting Email Stationery, see 6.g Creating your Job Using Email Stationery

c. Adding Content to the Email Bulletin

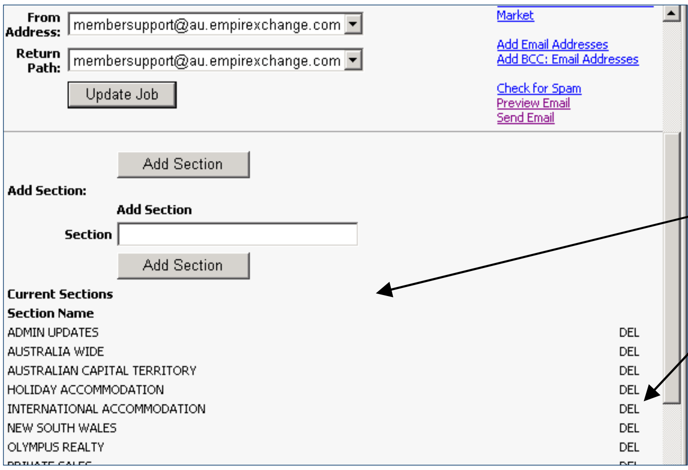


Change Title: Click on this link and Change the Email title then select 'Update Title'.

Change Header Image: This allows you to choose the header image you wish to display at the top of the email that suits the content of your email.

Change Background Cover: You can change the colour surrounding the body of your email. To do this, you will need to know the colour code.

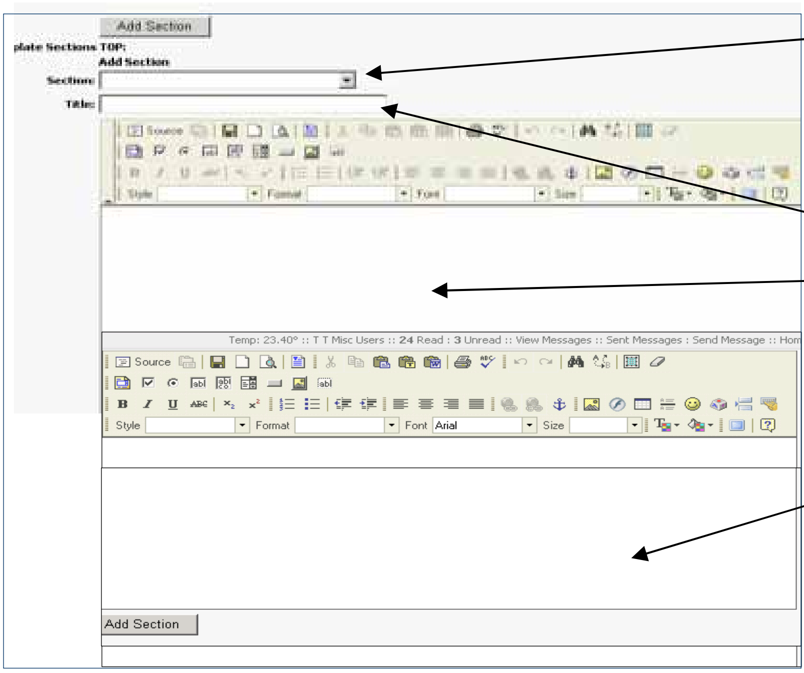
Add Banner By-Line: This allows you to add a Text line to the beginning of your email.



Manage Section Titles: Your email can have section headings, however these need to be added to your job before you can insert them. Type the section header you wish to use in the field box tagged 'Section' and click on 'Add Section'. If there are section headers you will no longer use, you can click on 'DEL' beside them and they will be removed. Section headers are specific to your login, so if someone else wants to revise or update your email, they will have to create their own section headers before hand.

Add section above/below Members Market:
If you have ticked the Member's Market box when setting up your job, you can now add a section to your email bulletin that will be displayed above the Member's Market. This section is usually for Exchange news, trading tips, and administrative matters, etc. If you do not need this section, and have not ticked "Member's Market, you can now continue with the body of your email by clicking 'Add section below Members Market'.

The 'Add Section' screen appears.



Select the Section under which the information is to appear by clicking on the down arrow. You can devide your email by state, category, region, or have not section devisions at all.

Add a Title for your section, then put the content in the text box below the Edit icons.

You can separate the contact details from the body of the information by including them in the second text box, however this is not necessary and if this box is left empty, it will not appear in the finished email.

Format your Content:
You can format the information in both text boxes using the edit icons above the text box, however the other sections are preformatted. When adding colour and size to your text, remember that this may contribute to your email being considered SPAM. See the tips to avoid this at the end of this section.

When you have completed your content, click on the "Add Section" button at the top or bottom of the Edit Screen. Continue adding sections in this manner until your email is complete. To view your completed email, click on 'Preview Email'.

You do not have to complete your email at one time. You can click on the 'Update Job' button at any time and exit the programme. When you return to the Email System, your job name will appear under the 'Email Summary' text link. Clicking on the name of your email job will open your email in the Preview mode. From there you can continue to add of edit sections before finalising your email bulletin.

TIP: as the intranet will automatically logged you our after 20 minutes of inactivity, it is recommended you create your text in notepad or a similar programme and then copy and paste it into the text box when ready. It you are distracted and automatically logged out, you will lose all the work you have done. The other alternative is to click "Add Section" on a regular basis as you work through your content. DO NOT copy and past from and email or Word document directly into this programme as if will interfere with the formatting and you may not be able to correct it. ALWAYS copy and past the information into NotePad or similar, then copy and paste from there to the email system.

d. Preview Screen

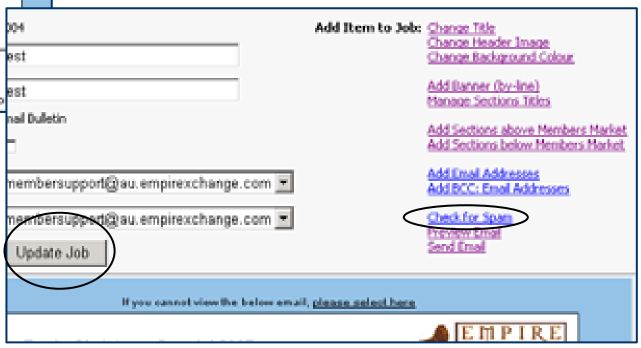
To view your completed email bulletin, select on ‘Preview Email’. Your email bulletin displays in much the same way as it will once sent. At this stage you can still edit sections by clicking on the

Edit icon,

or delete a section using the Delete icon.

You can move the item up or down within the section using the up and down arrows.

When you are happy with the way your Bulletin appears, click on the ‘Update Job’ button.



Your next task is to check your email will pass the SPAM test. Clicking on ‘Check for Spam’ will send the email to the address of the person logged into the intranet on the computer you are working on. In most cases this will be you. If your email arrived in your mail box labeled Spam, you will need to find those things in your email that accumulated points, and change or delete them.

See **Tips on Avoiding Spam** at the end of this section.

e. Adding Email Addresses

Clicking on the ‘Add Email Addresses’ link will bring up a screen that allows you to select your member email addresses by region and / or Category. National Agents and authorised Head Office staff will be able to select all the country’s member emails by Regional Area, Physical Area or Category.

Refining your Email Address Selection:You can further refine your email list by making the selections below.

Club Members Only: Tick this box when sending out emails that are meant for Club members only.

Real Estate Only: If you are sending out an email to your members about property purchase opportunities, make sure you tick the ‘Real Estate Only’ box. This will ensure that those members who have advised head office that they do not wish to receive emails about property opportunities are not included on the email list you are sent.

Sponsorship Only: Tick this box if you wish to contact only those members who have received Sponsorship funding.

External Emails Only: Members can choose to receive extra promotional emails other than the national bulletin and Spotlight. Often members have special offers that are time sensitive and need to go out immediately, but not all members which to receive extra promotional emails. This box must be ticked when sending out emails of this nature.

Include all Members: National Agents have the options to send an email to all members, including those who have opted out of receiving promotional emails. If you are sending an email that is administrative or procedural in nature and all members of the exchange need to receive it, tick the ‘**Include all Members**’ tick box. Never select this box if you are sending a promotional email as you may contravene national laws relating to SPAM.

Add Email Note to Members: This function is very useful for Member Support staff to track which members have received networking email. By typing a message in this field box, it will be added to the notes of all members who receive the networking email. Member Support can then tell what contact the member has received from the exchange and which members have been recommended to them.

Once you have made your selection, click on the 'Add' button. If you are then presented with a blank screen, scroll up and you should see a text message that reads 'Done adding addresses'. All email addresses are added to the BCC (blind carbon copy) field.

Adding individual email addresses
You can add individual email address by clicking on the 'Add BCC: Email Addresses'. These must be typed into the field box and added one at a time.

f. Checking SPAM Status

Click this link and the email will be forwarded to the mailbox of the person logged onto the intranet. If your email comes through with a SPAM prefix, you will need to revise the content of your message to reduce the Spam count.

Tips on Avoiding Spam Points

The content and formatting of your email determines whether it is labeled as SPAM when directed to your recipient. Often people have their computer set up to send emails labeled 'Spam' directly to their trash box so your emails may not be read. Below are examples of text or formatting and the spam points they generate when included in your email. In most cases, once your spam points total around 5, your email will be labeled Spam.

Click Below	0.10
Font Colour Blue	0.10
HTML Link 'Click Here'	0.10
No Obligation	1.46
NO Real Name	0.16
Free Quote	2.34
Free Trial	0.90
HTML Title Empty	0.12
Money Back	2.13
No Cost	1.67
Remove or Removal	1.95

In ordinary terms, coloured font, very large font sizes, excessive use of capitals, excessive use of exclamation marks, combinations of letters and symbols, i.e. $AVE CA$H, and words such as free, guarantee, save, click here, mortgage, free free, free trial, and money back, all add to the Spam point total of an email.

Any unsubscribe facility, even though we are required under the Spam Act to include one, will also generate spam points.

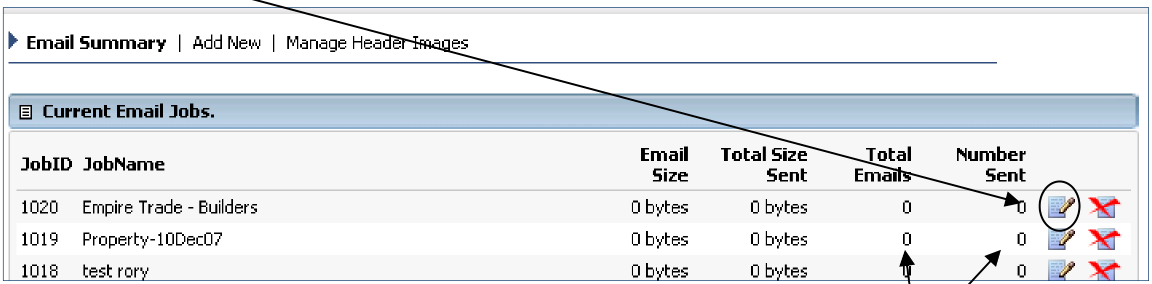
For those who want to look into this further, follow this link:
http://spamassassin.apache.org/tests_3_1_x.html

g. Sending your Email

Once your email is complete, checked for Spam, and all email addresses have been added, simply click on the 'Send Email' text link. Your job summary will be displayed, including the number of email addresses to which you are sending the email. Click the 'Send Email Job' button and the job will commence sending.

Please note that depending on the number of email addresses, your email may take several minutes to send and you cannot **work in this window until all the emails have been sent**. To continue with another job on the intranet, simply open a new browser window and log in. The other window will remain open and continue sending your email.

If for some reason your transmission is interrupted or incomplete, open up the email system, and click on the send link.



After you have sent your email, always check the 'Number Sent' with 'Total Emails'. It is normal for there to be a small discrepancy, particularly when sending large numbers, however if the difference is 10 or more your transmission may have been interrupted. Resend the email. Those who have received the email already will not receive it a second time. It will only be sent to those email addresses it didn't reach on the first transmission.

PLEASE NOTE: once you have commenced sending your email, you can only add new email addresses via the 'Add BCC: Email Addresses' text link, one at a time. If for some reason you have commenced transmission before adding all the email addresses you intended, you will need to contact the IT Department at Intl Head Office who will reset the email address section.

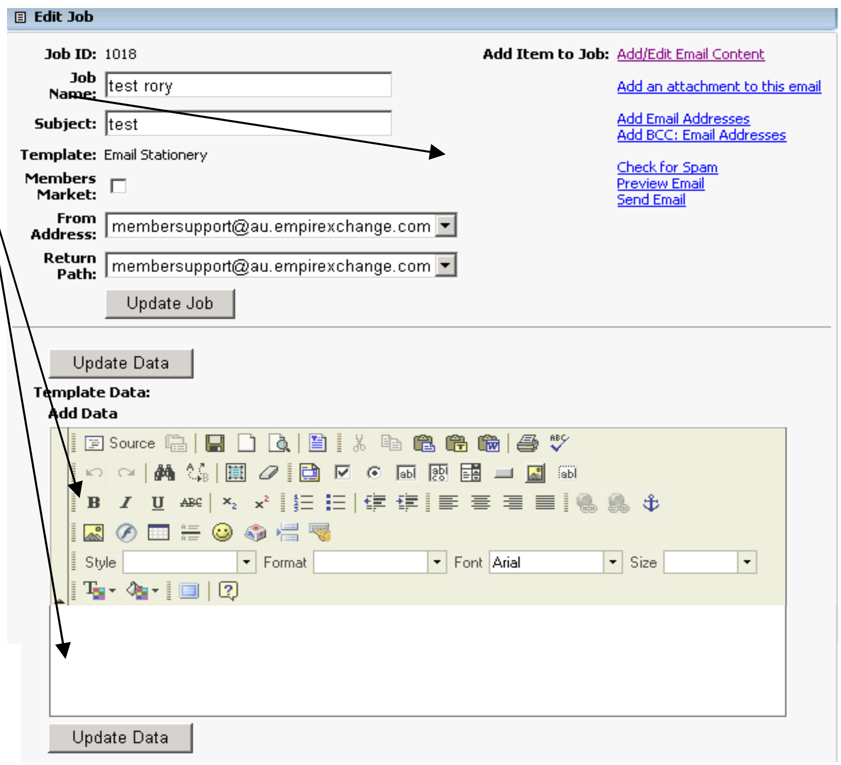
h. Creating your Job using Email Stationery

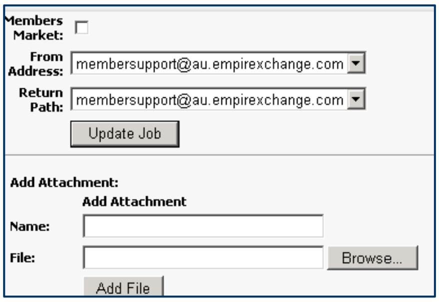
The Steps outlined in 6.a and 6.b can be followed. From 6.c the process differs slightly.

Adding Content to the Email Stationery:
Click on 'Add/Edit Email Content' and
type or paste your text into the field box using the formatting icons to format your text.

Click on 'Update Data'.

Adding an Attachment
You can add an attachment to your email by clicking on the text link 'Add an attachment to this email' then using the browse button to find the file you wish to attach. You can also select the name you wish to appear as the attached file by typing it into the field box titled 'Name'. The name you type will appear with the extension that represents the file type. E.g. a Adobe Acrobat file will have the '.pdf' extension, and a Word file will have the '.doc' extension.





Click on ‘Add File’ when finished.

Follow steps 6.d to 6.g above to preview your email, add email address, check for SPAM and send your message.

7. Notes Centre

Here you can access a list of your ‘Notes to Do’; notes still waiting for completion; and you can view past notes by selecting the month you wish to view.

a. Notes to do

From this screen you can view all notes you have entered and requested a ‘Reminder’. As you complete the reminder task, tick the check box at the end of the reminder and select 'Mark as Completed'. The reminder note will be removed.

b. View Past Notes

This screen will display by selected month and year all the notes you have entered under the following headings: Date; Trading Name; Account Number; Note; and Reminder Date. You will also see listed all notes automatically generated by actions you have taken on a member account. For example, if you forward a username and password by clicking on the ‘Send Username and Password’ link under ‘Print View’, a note will be generated to the account stating ‘Username and Password Emailed’.

This function provides a great memory jogger when you are talking to members, or trying to find information you know you placed on the system, but just can't remember against which member it was logged.

c. Track

Visible to National Agents and Head Office Staff

This screen displays all the notes you have entered that require a response from an agent or staff, plus any responses that have been made. You can keep these entries, or delete them once they have been actioned. This list is helpful to keep track of tasks you have given to agents or staff.

8. Print Cheques

Head Office Use Only

Cheque books that have been ordered will display in a list when you select ‘Print Cheques’. If a request for a cheque book has been entered twice by accident, you can check the second entry then click on ‘Delete Cheque Book. When you select ‘Print Cheque Books’, ALL the entries are processed and then deleted from the screen. You are not able to select some for printing, and then go back and print the rest at another time.

An email with a PDF attachment will be forwarded to the person who has logged onto the intranet. Ensure you select A4 size before printing, otherwise the printed text will be in the wrong location on each cheque slip. Each new cheque slip will be numbered consecutively from cheque book to cheque book. You can adjust the numbering from the ‘Misc’ view of Member Edit. See Section 5.e, Cheque Number.

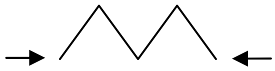
Making up a Cheque Book

The following components make a cheque book:

- 4 sheets of printed cheque slips
- Wrap around cheque book cover
- A ‘running low on cheques’ slip

Keep the cheque slip sheets in the exact order they were when you removed them from the printer. This will ensure the cheque slips are numbered correctly when separated.

- Make sure all 4 sheet s are well aligned and then fold them accordion style (image below) along the perforated lines.



Accordion style folding

- Tear off the bottom row of cheques first and place a ‘running low on cheques’ form on top.
- Continue tearing the next row of cheques from the bottom up and placing the piles one on top of the other.
- Place the wrap around cover, right way up, white side facing out, and with the dark blue portion of the cover aligned to the left.
- Staple through all cheque components top and bottom, on the left hand side of your cheque components.
- Wrap the cover towards the left, over the staples, and behind the cheque components. Fold the wrap around cover all the way round until you can tuck the front cover in under the stapled section.

9. Newsletters

Head Office Use Only

National Agents and nominated staff can load their newsletters directly to the corporate website from the Intrranet.

<u>It is important that you convert your newsletter to PDF</u> using Adobe Acrobat before uploading. You will need to purchase the full version of Acrobat, or use one of the free programmes downloadable from the web. This will assist in keeping file sizes small, and allow all members to view the document. Programmes such as Word and Publisher are proprietary and cannot be viewed unless the reader has that same software and version.

By selecting ‘Newsletter’ from the navigation table, the ‘Upload New Newsletter’ page appears. Newsletters can be uploaded by clicking on ‘Browse’ and navigating to the location on the computer where the file is stored. Assign a display name to the file which should be the month and year of the publication, e.g. January 2004 in the case of monthly publications.   If more than one newsletter is created in a given month then the date precedes the month and year e.g. 10 January 2004.

Next, select the date of the newsletter in the ‘Order Date’ field. This will ensure the newsletter links are displayed on the screen in the correct date order, from the most recent to the oldest. Ensure the correct agency is highlighted, then click on the ‘Upload’ button confirm the upload of the newsletter file.

You can also correct errors on previously uploaded files by first deleting them, then reloading the correct file. Click on the space beside the file name you wish to delete. The selected file will be highlighted by a dark grey. You can select multiple files, or delete them individually. Once all files you wish to delete have been selected, make the button beside ‘Delete Selected Files’ at the bottom left of the page, then complete the process by clicking on the ‘Delete’ button on the bottom right of the page.

Now load the correct files. It is a good idea to retain past newsletters so members can look back over services and specials that have been offered in the past. This will also be a good marketing tool for prospective members.

10. Help System

This is visible only to International Head Office Super Users and is the programme that manages the Help System available to agents and staff from the Procedures and Manuals Centre. See 4.d.

MEMBERS

1. Add

Member accounts should only be added from an original membership application form, or from an online application. All new membership must be approved by the appointed officer and should be accompanied by the membership fee payment. An application should not be approved if it is incomplete, the applicant's statement has been altered, or particularly if the following information is not included: Business owner's home address and home phone/mobile; signatures for all owners/directors; more than one account holder is entered when the company or partnership box is ticked. An account should not be opened by one owner/director without the consent of all other owners/directors.

The membership application form is a contract and once processed, should be filed by membership account number in a unique member file.

ABN / Co.Reg	Enter the business ABN or Company Registration number. Ensure you check the relevant government sites to verify the ABN or Company registration number is correct.
GST / VAT:	Select Yes or No to identify if the business is registered for the country's consumer tax.
Reg. Company:	This must the registered name of the company that is assigned to the ABN or company registration number.
Trading Name:	Enter the companies Trading Name. In some countries it is necessary to have a second ABN if the trading name differs from the company's registered name. It is the Trading Name that is displayed in the directory when a member is Actively Trading.
Statement Display:	Use the drop down arrow to select which business name the member would like to display on their invoices and statements; either the Trading name or the Registered company name.
Account Holder:	Enter the name of the person who owns the account and is the owner of the business. If there are more than one owner, all names must be entered here, separated by a comma, as all owners should have equal access to and knowledge of the account.
Account Holder Firstname:	Enter the first name/s or christian name/s of the account holder/s. Separate multiple surnames with a comma. This and the next section are required to be completed so the salutation in correspondence displays correctly.
Account Holder Surname:	Enter the surname/s or family name/s of the account holder/s. This and the next section are required to be completed so the salutation in correspondence displays correctly.
Account Holder DOB:	Enter the first account holder's date of birth
Contact Name:	Enter the name of the person nominated by the account holder as the contact person for all sales enquiries. This is the name that will be displayed in the directory for actively trading members. This can be different from the Account Holder. The Contact Name has not authority on the account and is not to be given access to confidential account information.
Contact Name DOB:	Enter the contact name's date of birth
Signatories:	Enter the name of any persons nominated by the account holder to have authority to sign on the account. An Additional Signatory form is required, signed by the account holder and all nominated signatories. A nominated signatory has access to statement information and can sign cheques to be drawn on the account. Signatories cannot make changes to the account information.
Email Address:	Enter the email address on the application form taking particular care to make no mistakes. You have the opportunity to include different email address for different account purposes once the account has been created.
Date Joined:	This can be left blank as it is generated automatically
Email Outs:	A member can elect not to receive promotional emails from the Exchange. However this choice is usually made after the account is created. I, however, this is a second account for personal spending, or a Contract account with an additional trading account attached, you can select 'No' to avoid the member receiving duplicate emails.

RE Email Outs:	A member can elect not to receive promotional Real Estate emails from the Exchange, but they may still be happy to receive general promotional emails. However again this choice is usually made after the account is created.
Webpage URL:	Enter the URL of the member business's website
Phone No.:	Enter the contact number for the business. The first text field is for the area code and the second text field is for the number. Enter your numbers in a uniform and consistent manner, e.g. for Australian numbers enter 07 in the first field and 4567 3456 in the second text field, always grouping the number by four digits, and separated by a space.
Fax No:	Enter the business's fax number in the same format at the number above.
Home No:	Enter the member's home number. This will not be displayed in the directory or online.
Mobile:	Enter the member's mobile number remembering to tick the box if the number is not to be included in the directory or given out to members.
Physical Area:	
Agent Area:	
Status:	
Wages Account:	
Classifications:	
Broker Driven:	
	Category 1
Category:	
Description:	
English:	
Categories 2, 3 and 4:	
	Business Address
Street Number:	
Street Name:	
Address Line 2:	
Suburb / City:	
State / County:	
Postcode / Zip:	
Home Address:	Complete in the same manner as the Business Address. This address will not display in the directory. If the Home Address is the same as the Business Address, tick the box: 'Same Postal Address'.
Postal Address	Complete in the same manner as the Business address. This address will also display in the directory. If the Postal Address is the same as the Business Address, tick the box: 'Same Postal Address'. If the Postal Address is PO Box, write this in the 'Street Name' field.

2. Internet Members

3. New Member Docs

4. Summary

Shows the break down of the total membership base. Total members in Australia, total members in the world, non-listed members, active members, deactive members, contractors, sponsorships, staff accounts and suspended accounts.

5. Graphs

Various graphs of licensee activity and estimated growth are available, plus representation of new members numbers by classification.

6. Order Cheque

Simply enter the member's account number and a cheque book will be mailed from Head Office.

7. Order Direct

8. Order Mem Cards

Simply enter the member's account number and a membership card will be mailed to the member. Ordering a new or additional member card will incur a fee of $5 cash. This will be added to the member's cash fees for the month.

9. Tax Invoice

10. Send Xmas Card

A new electronic Christmas greeting will be available each December. Enter the member's account number, and a computer generated Christmas card will be sent to the member's email address from the staff member logged in and Empire Trade.

11. Club Admin

12. Create Invoice

13. Invoice Report

TRANSACTIONS *Head Office Use Only*

1. Transfer Funds

Cheques can be processed through the system by completing the information requested. You have to option to change set fee percentages on a one on one basis, clear transactions immediately or elect not to charge fees by individual transaction.

2. Currency Convert

Using the currency conversion rate, this will work out the conversion from one currency to another.

3. Auth Check

4. Auth Edit

5. Scheduled

6. D/D Upload

7. Facility

8. RE Facility

9. Conversion

FEE PAYMENT

1. Fee Payment

2. RE Fee Payment

3. Fee Reversal

4. RE Reversals

5. Add Fees

6. Transfer Fees

7. Dishonoured Payment

8. BPAY Upload

CREDIT CARDS

1. Pay Fee
2. General Charge
3. Report
4. Declined Cards
5. Expired Cards

REPORTS

1. Finance Reports
2. Commission Reports
3. Member Reports
4. Facility Renewals
5. Daily Reports
6. Log Reports
7. Admin Reports
8. Manage't Reports
9. Feedback Forms
10. Inter Reports

MONTHLY

1. Print Tax In
2. Print Statements
3. Cash Fee Letters

AUCTION

Head Office Use Only

1. **Auction**
2. **Auction Admin**

CLASSIFIEDS

1. **Add** - Simply complete all the data fields to enter a classified
2. **Edit** – Allows you to make a change to a classified or delete a classified
3. **Search** – Simply choose category and / or area to perform a search of a product on the classifieds
4. **Picture Upload** – Allows you to add a photo or picture to the classified

REAL ESTATE

1. **Add**

2. **Edit**

3. **Cat Add**

4. **Search** – Allows you to search by area and / or category the different real estate listings.

5. **Picture Upload**

CATEGORY

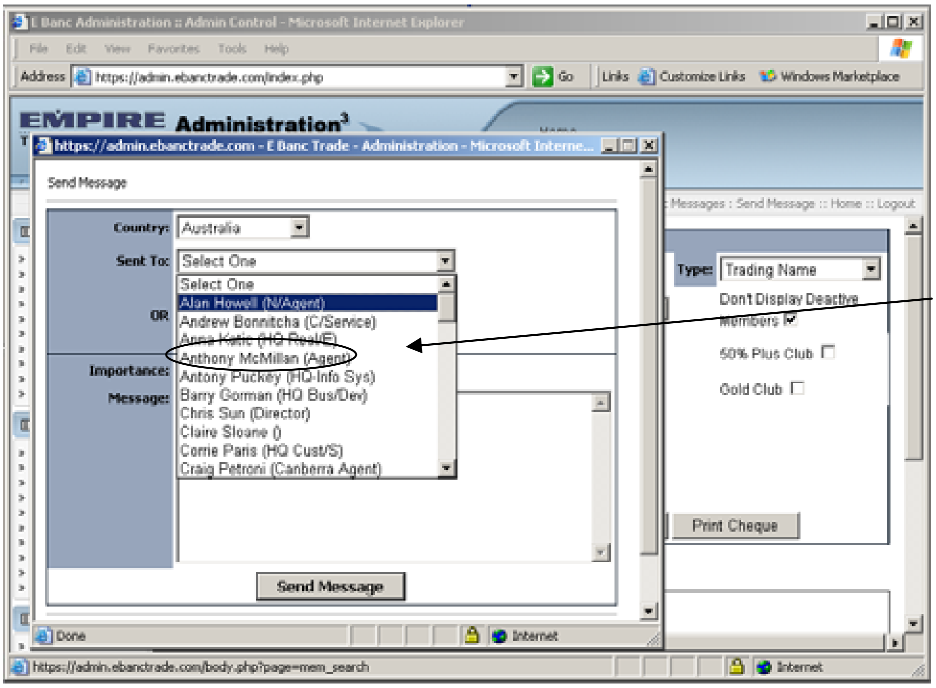
Head Office use only

1. **Add**

2. **Edit**

V. Internal Message System

The message system allows all staff worldwide to communicate immediately online where intranet access has been approved. At the top of the Intranet homepage are text links that relate to the Message System: 0 Read (the number of messages in o and 0 Unread, showing you the number of messages you have received stating how many you have read and how many are still to be read.



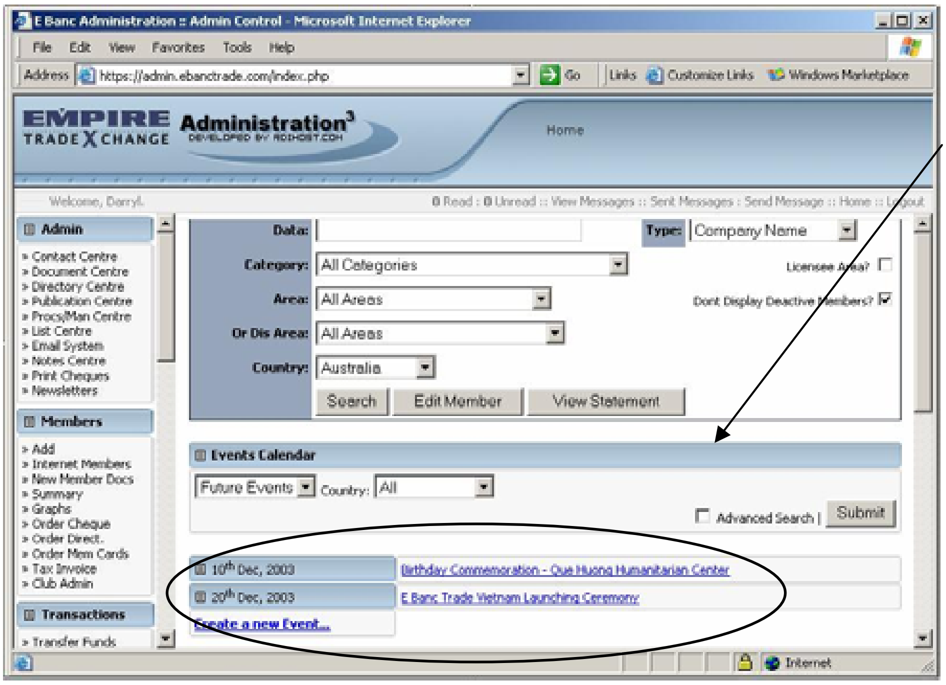
Send message
Simply type your message and select the name of the person you wish to receive the message. A complete list of all the people with access to the Intranet is provided with their location and position in brackets beside the name.

View message
When a message is sent to you a pop up box will appear "New message waiting". Click on 'view messages' to view all of your received messages. From this screen you can check the box to the side of each message after you have read it and wish to delete it. Once you have checked all the messages you wish to delete, select the Delete box at the bottom of the messages screen.

Reply to message
Click on the text of each message to see the entire message display. Select the 'reply' link below the message and a new window will display with the original message. Simply type in your reply and select "send".

Sent messages
Allows you to view all of the messages you have sent to others. You can delete these as you no longer require them by ticking the delete box.

VI. Events Calendar



The Events Calendar displays on the home page of the Intranet and provides a snapshot of upcoming events within the Empire Trade International group. This includes events we may sponsor or events we have initiated.

You can view all events, or by country, and options to view All, Future Events, Past Events or Yearly Events are available. A summary of events will display when you select 'Submit'. Simply click on the title to view the details of each event.

Adding an Event

Regional Agents and staff with admin access can add an event. You can also edit events you have submitted. To create a new Event, select 'Create a new Event' from the bottom left of the calendar and include the information in the fields that display. Remember to select the country in which the event will take place from the drop down box.

Editing or Deleting an Event

You can only edit those events you have submitted but selecting the 'Edit' link to the right of the event listing. Similarly, you can delete entries you have submitted by selecting the 'Delete' link to the right. International Head Office and edit or delete all events listings.

VII. International Master Licensee Functions

1. Deactivating an Account

By selecting this option, any attached Facility will first be removed automatically from the member's account, and the system will identify if there is any cash or trade balance owing to the company. In this case, an option will be provided to print a 'Close of Business' letter which is then sent to the member.

After printing this letter, select 'Continue'. The system then changes the status of the member to 'Suspended Locked', and sets a reminder for 14 days. By law, every endeavour to collect outstanding funds must be made prior to deactivating the account. When these outstanding balances are collected, or every possible action has been taken to try to collect these funds, return to Edit Member, select 'Actions', then select 'deactivate'. A tick box to confirm you have attempted to collect these funds should be ticked. Next select 'Continue'.

The system will now write off any trade balance to the Empire Write Off Account, and reverse any outstanding cash fees. This completed the deactivate procedure and no further editing can be carried out and this member's entry will now only be viewable by administration staff.

2. Editing Transactions

A facility to edit transactions is available by either clicking on the date in the statement of a particular transaction, or by selecting 'Auth Edit' under transactions from the left hand navigation column on the Intranet.

The first option will bring up both sides of the transaction. Here you can edit the amount of the transaction, and the date. If the transaction occurred within the current month, you will also be able to change the fees charged. You cannot change fees changed from transaction that occurred in previous months because if your accounting systems work on an accrual basis, GST, VAT AFA etc., will have already been paid.

Therefore, if you need to change fees from older transaction, you must do a fee reversal by selecting 'Fee Reversal' from the left hand navigation column on the Intranet.

The second option allows you to enter the authorisation number after selecting 'Auth Edit'. Select 'Search' then you can follow the same procedure explained above.

For either option, when both sides of the transaction are displayed, the Buyer account number from one line must match the Seller account number from the other line. Also, the Seller amount must match the Buyer amount and both dates must match.

3. Suspense Account

When cheques are received that are under the prior authorisation limit each country has in place, and the Buyer has inadequate funds to cover the transaction, this cheque has to be honoured. To accommodate these transactions, a 'Suspense Account' has been established. When you enter the cheque details, the system identifies these transaction and automatically enters a transaction transferring the required funds from the Suspense Account to the Buyer's account. On these transactions, you will see above the 'continue' button, a tick box labeled 'Suspense' and a link. 'Print Suspense Letter'. Select the link to open the appropriate letter for printing and mailing to the Buyer that informs them that they have drawn cheques with inadequate funds, and requests an attached Facility Request form be completed and returned asap. On this form, fill in the amount of the Facility that is stated in the letter.

Next select 'Continue' and the transaction between the buyer and the seller will be completed.

When the completed Facility forms are returned and added to the member's account, the transaction against the Suspense Account can be reversed. This transaction can be deleted only if it is within the current month.

Periodically you must go through the entries in the Suspense Account to follow up on any unreturned Facility forms and make a decision to suspend or not if the member repeatedly spends funds they don't hold.

Note: if a transaction is over the prior authorisation limit and there are insufficient funds in the buyer's account, the system will not allow the transaction to proceed. a LINK ABOVE THE Continue button will appear 'Print Dishonour Letter' This should be print.

4. Online Signups

When a members signs up online, Head Office will receive email notification. Go to the Intranet and in the "member" section of the left hand navigation column is a link called "Internet Members". When you select this link, new online members will display. When you select the company name of each member, it will take you to the "Add New Member" page. Simply check there is nothing obvious wrong or missing, then select "Add Member".

5. Adding Categories

When adding a category, seriously consider if it is necessary. Always check existing categories to see if one of these might be appropriate for your new member's service. Categories have a way of getting out of hand very quickly. A good idea is to use the Yellow pages categories as a guide. At the Australian Head Office, we do not create a new category unless there are more than 3 members who could be listed under it.

When editing a category, please ensure you tick the Selected Services directory if appropriate.

For Example, tick the 'Contractor's Directory for any service that would be of use to builders or the construction industry, etc.

Only Information Systems staff at international head office are able to delete categories. Please do not blank out categories from the Category Edit feature.

6. Reprinting a Transaction Receipt

When viewing a member statement, clicking on the account name for each transaction, will bring up a box displaying the details of the transaction. Clicking on the Auth No in this box will display the transaction receipt, which can then be reprinted.

Appendix of Relevant forms

Unlist procedure
Admin Fee Guidelines