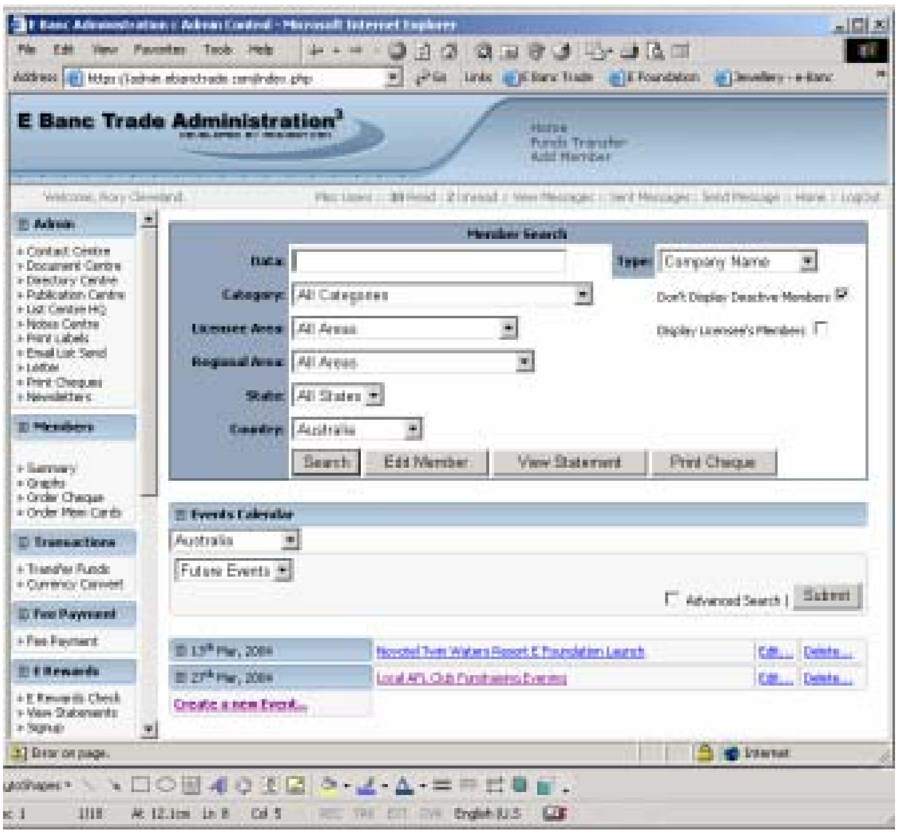
*Please note this guide is in draft format only and is not complete*

# GUIDE TO USING THE INTRANET



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# Guide to Using the Intranet

The Intranet is available to E Planet Trade Licensees and staff worldwide and is the information and communications hub for the company. Licensees can add and revise members, search the database, add notes to member records and send messages to other staff and licensees. You can order cheques, obtain up-to-date area email lists, upload area newsletters, and set yourself tasks with a reminder. You can transfer funds, pay fees, view member account information, email usernames and passwords to forgetful members and download and print licensee reports. You can also add and edit classifieds, and search the real estate database. All E Planet Trade stationery, forms, and publications are available from this site.

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

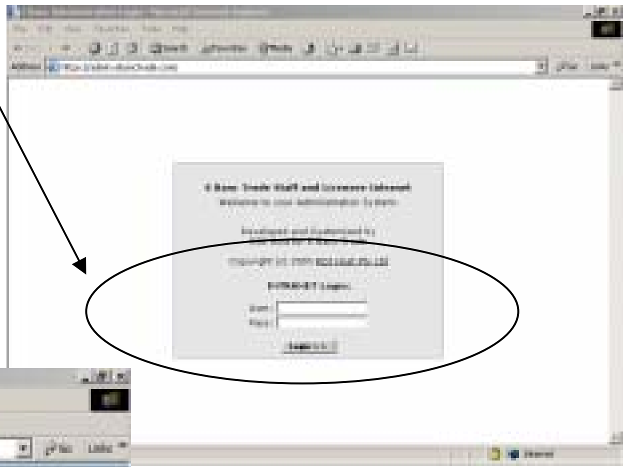
All Licensees and staff can use the intranet once they have received a username and password. Licensees can apply for access for their staff by completing the **Employee Access** form available from the **Document Centre** on the Intranet and faxing it to international Head Office on +61 [0]7 5437 7230

This guide will step you through the Intranet functions and it will become a powerful tool to both licensees and staff of E Planet Trade International.

Let's begin . . .

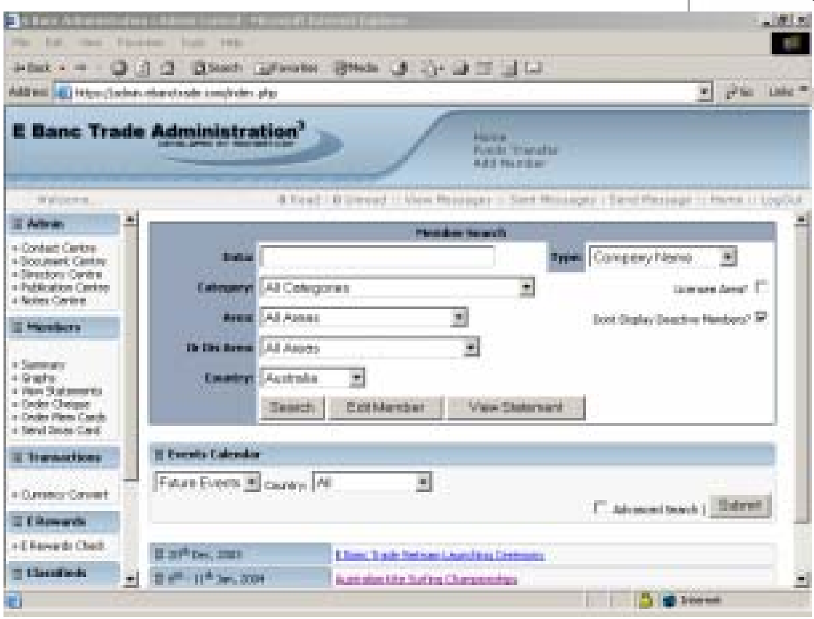
## I. Logging on

The Intranet can be accessed at: [http://admin.ebanctrade.com](http://admin.ebanctrade.com)
INTRANET LOGIN: You will then be asked to enter your username and password as below.



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

Access can be provided by submitting the Employee Access Form. Licensees must approve the request by signing this form and faxing it to head office. Without the Licensees signature, we cannot authorise access to the staff member.



# II. Search Methods

## 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.

**Company 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'.

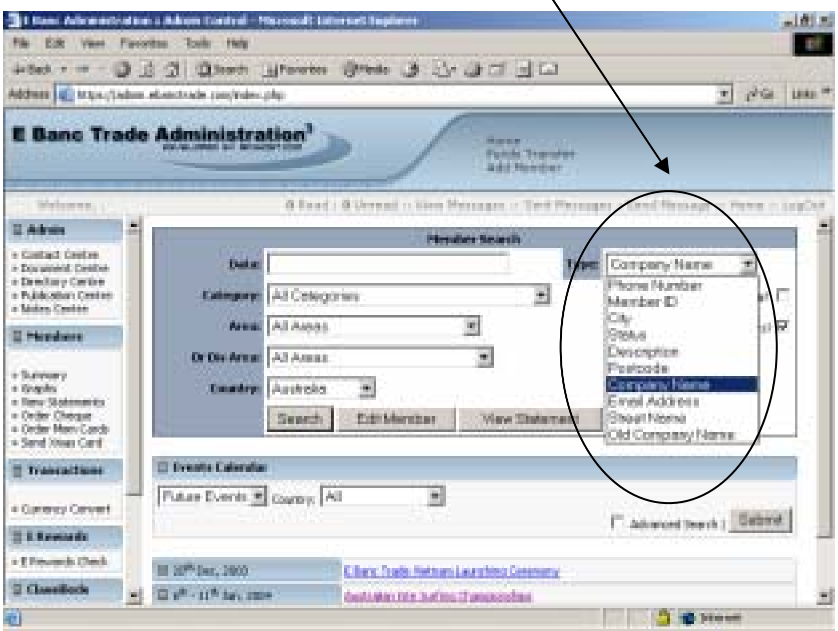
For surnames such as 'Van Der Ley', you can simply search by typing: 'Van D'. This will bring up all companies name that include the combination of 'Van D'. It will bring up names such as 'Evan Dickson', as 'van D' is included in this name.

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.

## 2. Search Type

Above we have shown how to search by **Company Name** using the **Data field**. When searching under the company name, the keyword you enter will bring up any matching words that are found in either the company name or contact name.



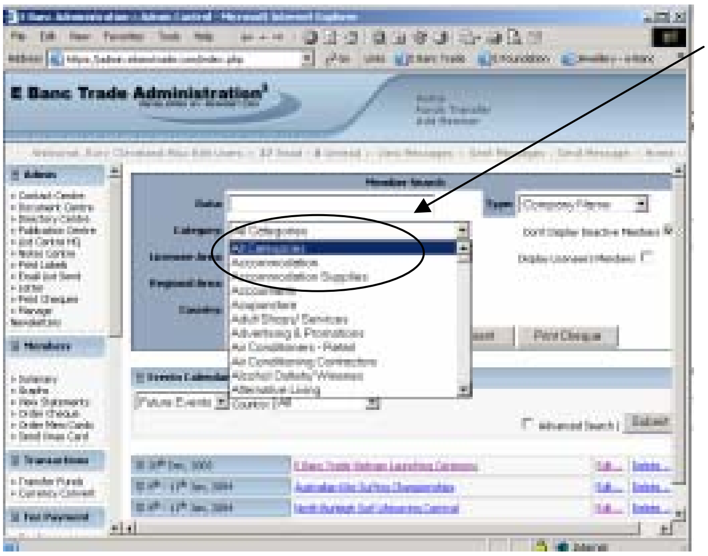

- **Phone Number** allows you to search phone numbers, but will only search for the main contact number, and will not search the home numbers or mobile numbers. Again as in the company name search you do not need to type the whole phone number. By typing in 0754 this will list all phone numbers including this combination.
- **Member ID**, allows you to search for specific account numbers.
- You can search under **City**, to display all the members in that city.
- **Status** allows you to bring up all member listed under a particular status. By entering one of the status numbers displayed below, the list of members you require by status will display.

| | | |
|---|---|---|
| 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 | E Planet 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 cannot be viewed by staff and licensees. File has been transferred to the debt recovery agent |

- **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.
- 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.
- 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 under 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 three area searches available.

**Licensee Area:** By selecting a specific licensee area, all members physically located within this area will display. For example: Brisbane North, Brisbane South and Brisbane West. By also ticking the box 'Display Licensee's Members', a list of all members for which that Licensee is responsible, will display, regardless of geographic area.

**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 geographical area within a country

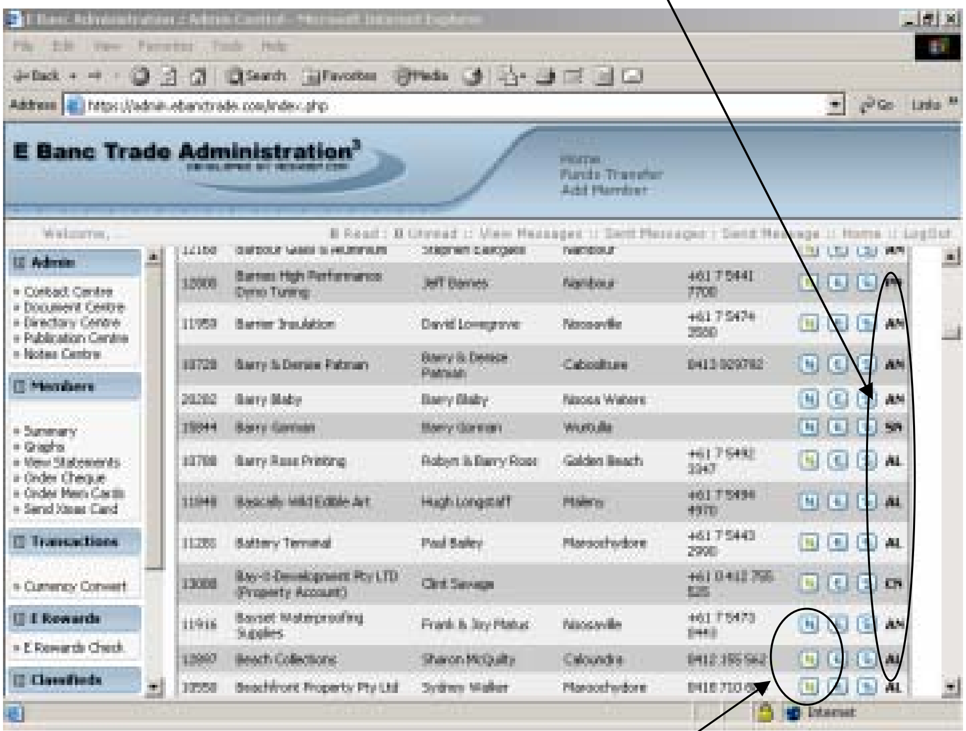
**Country:** This allows you to select a country first, **before** using other search methods.

# 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 is one or 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

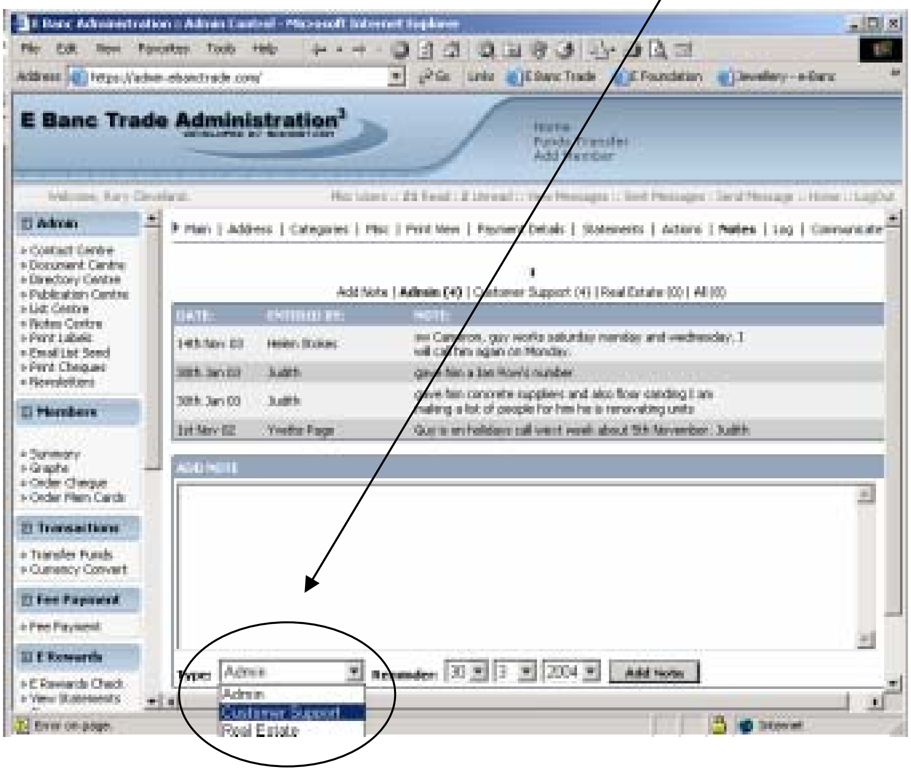



## 2. Notes Programme

- **Notes** allow for member information to be stored on the admin website 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 licensees. New notes can be revised by the person who place 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 E Planet Trade staff and licensees 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.

- The Notes Programme is categorised by subject matter.
  1. **Admin**: Administrative Information about a member that needs to be communicated to all staff and licensees, 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. **Customer Support:** This is used from the perspective of a Customer Support Officer and is where you can record anything that assists the Customer Support staff to better meet the needs of the member, i.e. goods they are seeking; problems they may be having; brief record or 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
- The text links at the top of the notes box indicates how many notes are logged against each of the three subject areas.
- Simply select the view you wish to read. All notes can be viewed by choosing "View All".
- Selecting the "N" against the business entry displayed on the screen allows you to access 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.
- **<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 type from the drop down menu.

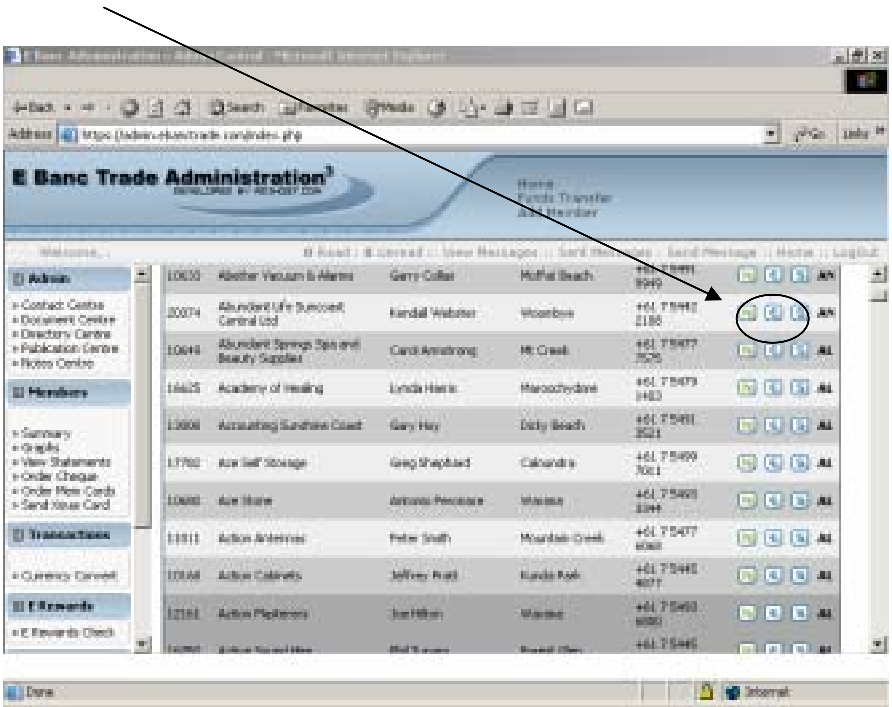


- You can also set yourself a reminder in the Notes system, which will alert you on the day you require to act on the member's account.  Simply select the date of your reminder before selecting "Add Note".
- This "N" displays at the top of the member's details page, or to the right of an entry when you do a directory search.  It is only viewable from the admin website and not from the corporate website.
- 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 licensees to see, use the Notes System.

**IMPORTANT**
Always remember that under the Freedom of Information Act, members have the legal right to request to see all online 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 see 'name' before dealing with this member.

## 3. Edit Screen



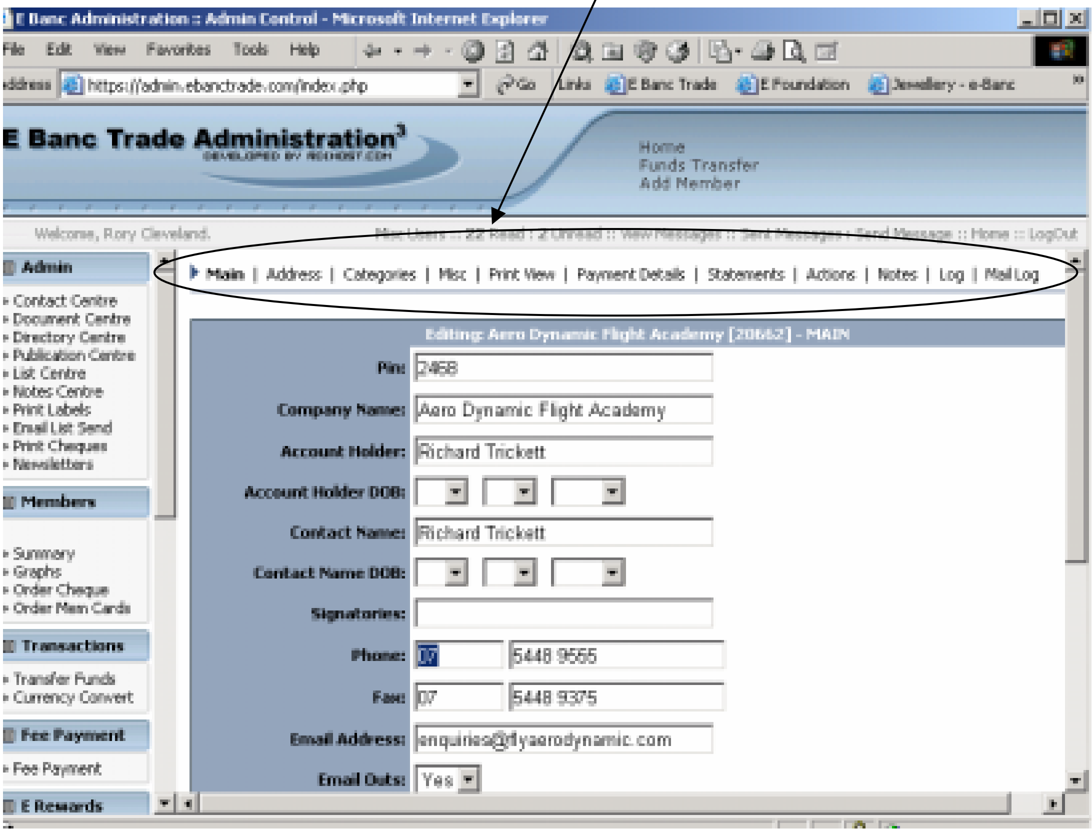

Selecting the "E" takes you to Member Edit.  Several views are available, and the default is set at 'Main'.

**Note:** You can request to have 'Print View' as your default by emailing your request to infosys@ebanctrade.com.

Once you open a member's account information by clicking on 'Edit', all account functions can be carried out without having to use the "back' function, or scrolling through the left hand navigation functions, as well as having to remember account numbers each time you perform a different function.

**Now, how to use it:**

When viewing a member account you will see the text links (explained below) listed across the top of the screen. On each screen view, the member account name and number is displayed at the top and bottom of the screen.




From the **Main view**, the box above the member details prompts for actions that need to be taken on the account. **<u>Always</u>** 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.

**TEXT LINKS**

These functions link to actions you can make in a member's account.

**Main:**

Displays the account name and phone/email contact information, if they receive promotions emails, their status, and under which area they are listed.

**Address:**

Displays postal and business address

**Categories:**

Categories and category messages are displayed. Members can now have a separate message appear against each category if they so wish. This is useful when you have a member who offers 2 or more diverse services. Instead of having the one message against each category, different messages can be entered.

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, simply select the new category from the drop down box. Once the changes are complete, click on 'Update Directory'.

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, or broker driven, please follow the procedure listed on the Document Centre under Procedures.

**Misc:**

Displays other account information such as ABN, username and password, mobile phone number, date joined, Salesperson, fees charged, etc.

**Print View:** (you can request this as your default view by emailing infosys@ePlanettrade.com)

Use this view to see or print all information on a member's account.

Membership details are displayed as below.

| | |
|---|---|
| **Account Pin:** | The account Pin is the verbal password that we request the account holder to state when needing information on their account |
| **Account Number:** | The members account number |
| **Company Name:** | The Company Name |
| **Account Holder:** | This is the authorised person who can sign for the account and is the primary account holder. |
| **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. |
| **Signatories:** | If the account holder wishes to nominate a second signatory to the account, their name would be listed here. This person is also authorised to sign for 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. |
| **Email Address:** | If a member allocates an email address, they do not pay a 5.50 / month fee<br>(Send Online Username) – Automatically emails the member their username and password. |
| **Receive Email outs:** | Yes or No – If this states YES the member will receive their tax invoice, updates and monthly email bulletins via email.<br>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. |
| **Receive Real Estate Email:** | Yes or No – Whether or not the member wants to receive special emails on property purchase opportunities. |
| **Web Page URL:** | Website address if available |
| **Status:** | Either: Active, Contract, Deactive, Sponsorship, Staff or Suspended |
| | **Business Address** |
| **Street No:** | This is the business address that is printed in the membership directory. |
| **Street Name:** | These fields cannot be left empty. |
| **Suburb:** | If the company works from home and does not want their home address published, we need to still complete the Suburb, City, State and postcode fields. |
| **City:** | |
| **State:** | |
| **Postcode:** | |

| | |
|---|---|
| | **Postal Address** |
| **Street No:** | The postal address is for all correspondence. This address needs to complete and correct. |
| **Street Name:** | |
| **Suburb:** | |
| **City:** | |
| **State:** | |
| **Postcode:** | |
| | **Other Account Details** |
| **Last Edited By:** | Shows you 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 Number:** | The home number is for our record only and is <u>never</u> to be given out. |
| **Mobile Number:** | 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. |
| **Date Joined:** | This shows the date the member joined E Planet Trade. |
| **Date Pack Sent:** | This shows the date the new membership kit was sent to this member. |
| **Username:** | This is the username given to this account holder for them to login on our website and access their account information. |
| **Password:** | This the password used with the above username given to this account holder for them to login on our website and access their account information. |
| **Area:** | This is the area where the member is located. |
| **Licensee Area:** | This is the Licensee where the member comes under. These two areas may differ as any member can request to be under any Licensee. |
| | **Categories** |
| | This is the promotional message that describes the business. This is printed in the membership directory. As this is their advertising, this message should be detailed. You can have up to four different promotional descriptions against four categories.<br>For other countries that use a language, other than English, the promotional message is displayed again in English |
| **Category 1:** | (Category Type) Each member can be listed in up to four 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:** | No Cat – means No Category |
| **Category 4:** | |
| **Broker Driven:** | Yes or No. If Yes, this member has requested to be broker driven, which means they will not be listed in the membership directory. They will still be listed under a category on the Intranet so that staff can locate them when searching the admin site. |
| | **Sales Person Details** |
| **Sales Person:** | This displays the actual sales person who signed this member up to E Planet Trade. |
| **Startup Fee Paid:** | This displays the membership fee that was paid to join. |
| **Startup 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 shows the amount of the facility applied to this account. |
| | **Transaction Fees Charge On** |
| **Buy/Sell:** | This shows the transaction type on which a fee is charged. |
| | **Transaction Fees** |
| **%:** | This shows the transaction fee percentage that applies to the account. |

| | |
|---|---|
| **Monthly Fees** | |
| **%:** | If a fee is displayed here, the member is an offline member and receives statements, newsletters and member updated via the post and is charged this cash fee monthly. |
| **Referral** | |
| **Account No:** | The account number of the member who referred this member. |
| **Others** | |
| **E Rewards?** | Indicates whether this account is an E Rewards member. |

**Payment Details:**

Displays account payment arrangements and E Rewards information.

**Statements:**

Past statements can be displayed by month and year

**Actions:** (These actions are mainly restricted to International Master Licensees 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 is logged under Mail Log.

  - Blank
  - Close of Account with Debt
  - Close of Business
  - Dishonour
  - Insufficient Funds
  - ITT Required

- **Open Second Account** (Intl master licensees only)
  Opens the add member page with common details already entered.

- **Fee Payment – Cash** (Intl master licensees only)
  Processed a cash payment against the member's account

- **Fee Payment – Cash** (Intl master licensees only)
  Processes a credit payment against the member's account

- **Fee Reversals** (Intl master licensees only)
  Processes a fee reversal against the member's account

- **RE Fee Payment** (Intl master licensees only)
  Processes a Real Estate fee payment against the member's account

- **RE Fee Reversals** (Intl master licensees only)
  Processes a Real Estate fee reversal against the member's account

- **Add Fees** (Intl master licensees only)

- **Dishonour Reversal** (Intl master licensees only)

- **Facility – Goods and Services** (Intl master licensees only)

- **Facility – Real Estate** (Intl master licensees only)

- **Conversion** (Intl master licensees only)
- **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'. (When printing onto pre-printed tax invoice stationery, you do not need to tick the Stationery Box). If you wish to email a tax invoice to the member, again select the month and year you require, then select 'Email Tax Invoice'.
- **Order Cheque book**

  Order a cheque book on behalf of a member
- **Order Member Card**

  Order extra or replacement membership cards
- **Deactivate Account** (Intl master licensees only)

  This option will allow you to carry out the process necessary to deactivate and account..

**Notes:**

Notes can be viewed by type (Admin, Customer Support, Real Estate, 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.

**Reminder Notes:** If you wish to be reminded to carry out a task associated with a member note, you can select the reminder date when you enter the note to the system. 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 choosing the Notes Centre. 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 as 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.

**Log:**

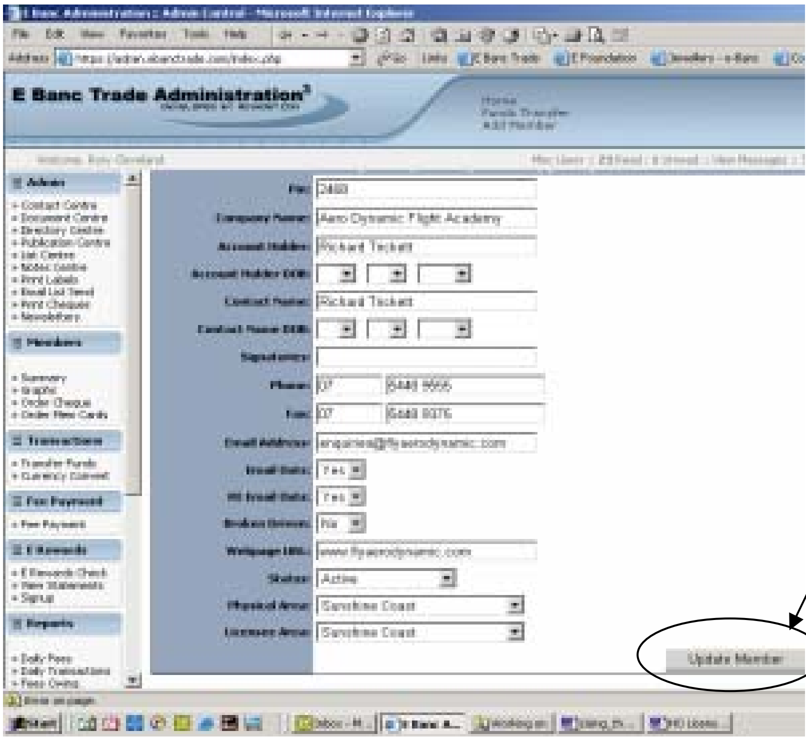
This function is available to Master Licensees and by special request to other staff and licensees. It lists when, who and what has been changed on the member's account.

**Mail Log:**

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

## 4. Edit Member Details

When you click on Edit Member, it brings up the Edit Member section and you edit each available section.




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

The fields that can be changed are dependent on access levels and include:

| | |
|---|---|
| **Contact Name:** | This is the contact name that will be printed in the membership directory. This can be different to the account holder. |
| **Email address:** | 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. |
| **Receive Email Outs:** | Yes or No – Select 'No' when the member does not wish to receive any promotional emails. |
| **Receive Real Estate Emails:** | Yes or No |
| **Web Page URL:** | The businesses website address |
| **Phone Number:** | This is the contact number that will be printed in the membership directory and must include the correct area code, e.g. Country code and state/county such as +61 7 |
| **Fax Number:** | The fax number is also listed in the membership directory and must include the correct area code. |
| **Home Number:** | The home number is for office use only and is never to be given out |
| **Mobile Number:** | The mobile phone number. Only give this out if approval has been given. |
| **Username:** | This is the username the member uses for the online login |
| **Password:** | This is the password the member uses for the online login |
| **Account Pin:** | This is the verbal password given by the account holder for security and to verify we are speaking with the correct account holder. |
| **Category 1:** | This is where you select the business categories. Category 1 cannot b be deleted unless by request to Head Office. |

| | |
|---|---|
| **Categories 2-4:** | Every member can be listed in up to four categories |
| **Promotional Message:** | The full description of the business |
| **Business Address:** | The business address is printed in the membership directory |
| **Postal Address:** | The postal address is not printed in the directory. |

## 5. Statements

By selection Statement, this will bring up a summary of the current month's account. Licensees and staff members can only see the statements of the members in their licensed area.

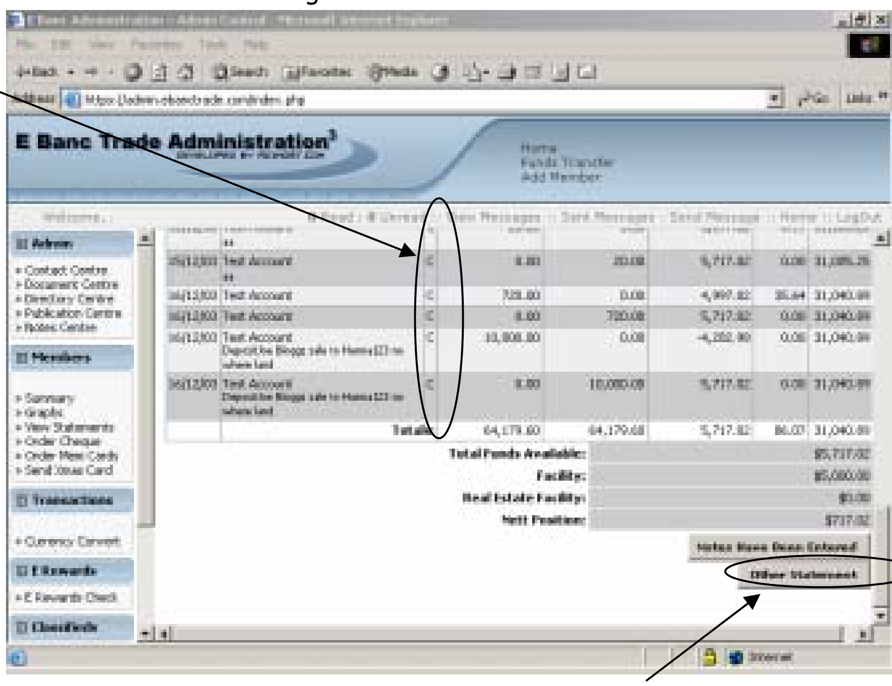
The following is displayed:

| | |
|---|---|
| **Total Funds Available:** | This displays the total funds available in the account, both cleared and uncleared. |
| **Facility:** | The amount authorised as a goods and services facility. |
| **Real Estate Facility:** | The amount authorised as a real estate facility. 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 available funds in the account, not including any facilities. |

The summary of the account includes the following:

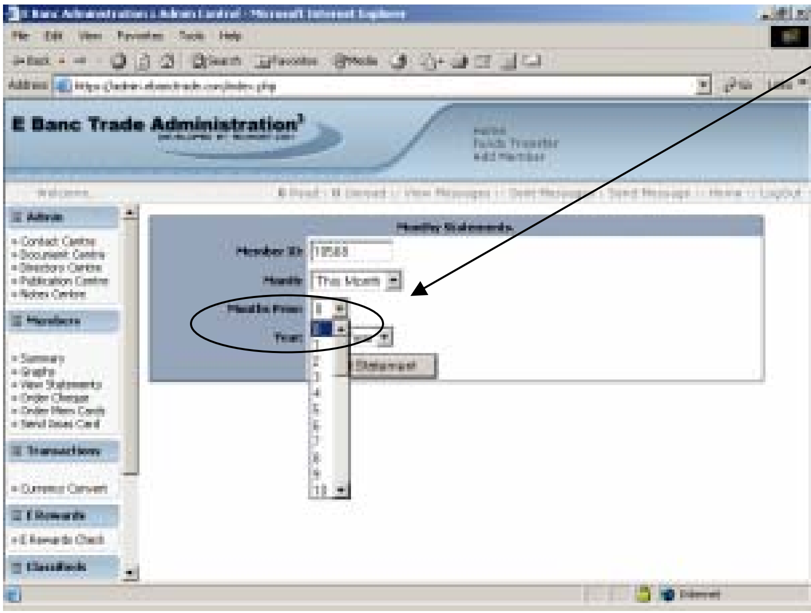
| | |
|---|---|
| **Date:** | Date of transaction |
| **Account:** | The account name of the business the member traded with |
| **Buy:** | The amount of the transaction |
| **Sell:** | The amount of the transaction |
| **Trade Balance:** | The running balance of the account |
| **Cash Fees:** | The cash fees for the transaction |
| **Cash Fees Owing:** | A total of all cash fees owing |

'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. Funds will not be cleared to the Seller's account until the original, signed cheque is received at Head Office for processing.




Clicking on 'Other Statement' gives you the option to view the account transactions up to the previous 40 months.

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

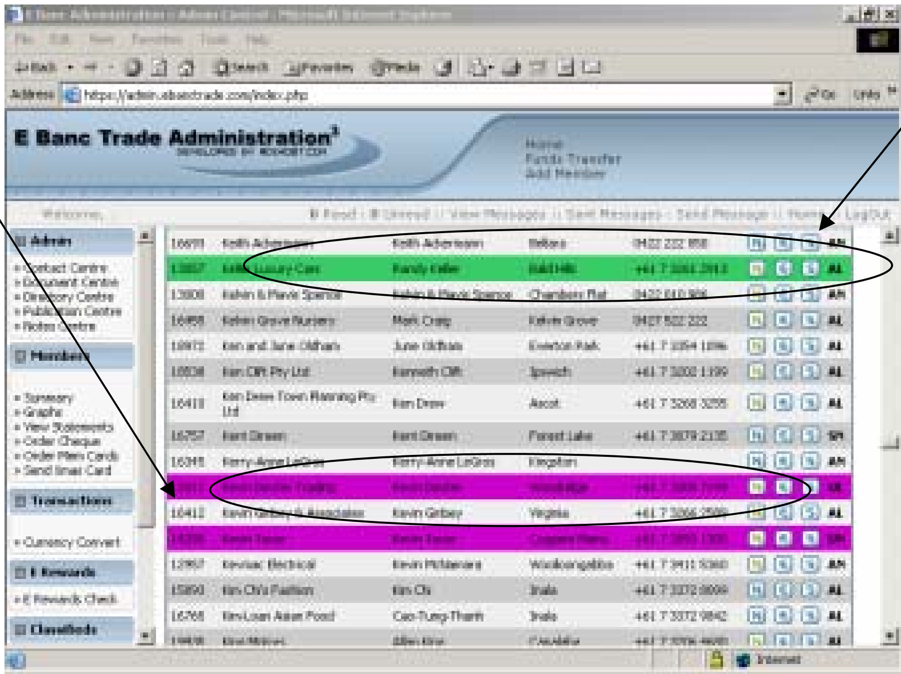



**The Golden Rule**

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.

## 6. Colour Indicators

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




**Red:**
Indicates a member's fees are overdue 30 days but no letter has yet been sent.

**Green: Fees are outstanding for 30 days**
A letter is forwarded 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**
A second letter is forwarded requesting payment within 14 days or member's account may be suspended until fees 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.

**Violet: Fees are outstanding for 60 days**
A third letter is forwarded advising that the member's account has been suspended and they are to refrain from any further trading. 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.

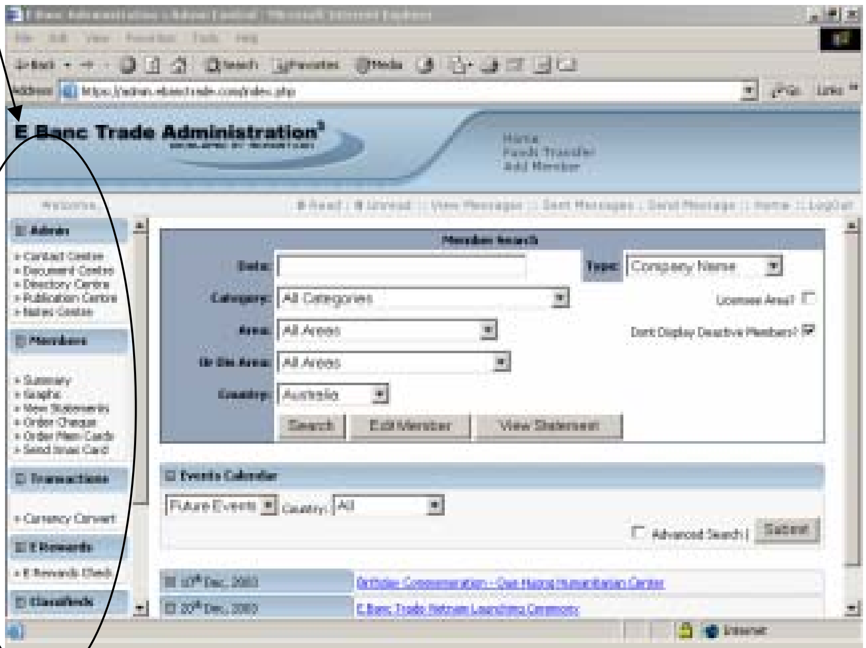
> **Note:**
> **Licensees and their staff and not to send out letters of request for payment of fees. These letters are forwarded by Head Office in each country only**.

## 7. Left Hand Navigation Table

**ADMIN**

**a. Contact Centre**

- **Licensee List**
  Gives you the ability to download the list of all Licensees and their full contact details. This includes Australian and International Licensees. This is always up to date information ready to be downloaded.
- **Employees**
  Lists all E Planet Trade staff by country and state. Soon to be listed also by licensee area.
- **Update Area**
  By selecting this tab, your licensee area details will display. You can update the contact details which will be reflected on the Licensee List.
- **Add Area** (Intl Master Licensee only)
  Add a new licensee area




**b. Document Centre**

The document centre allows you to download all the necessary documents, forms and information. These are updated regularly and are up to the date information.
The document centre includes tabs to:

- Forms: General Forms
- Stationery: Licensees' individual letterhead (b&w and colour); with Compliments; and fax form
- Applications: Membership and Sponsorship application forms
- Templates: Country Cheques and International cheques in PDF

- Official Docs: Most up to Rules and regulations and contractual agreements
- Procedures: General procedures
- Services: Information on services such as E Rewards, Advertising Subsidy, etc.
- Manuals: User Guides and training manuals
- Business Card Orders
- Product Orders

## Business Card Online Ordering

**Business Cards**

| | |
|---|---|
| set of 250 | $25.00 |
| set of 500 | $45.00 |

## Product Online Ordering

We have built an automated online product ordering system that is now partially functional. It is available from the Intranet by visiting the Document Centre then clicking on **Product Orders**. This is next to the link to the online business card ordering system.

**The first step** is to ensure the correct licensee area is displayed in the field box beside "**Order for**" at the top left of the screen. This should be your default licensee area. If you have more than one licensee area, select the one to which you would like the order delivered.

The **second step** is to select the products you wish to order and enter quantities. Once you have entered your order, select 'Submit Order'.

**Third Step**: A summary of your order will be displayed. Check the delivery address is correct and your order is correct. At this stage, you can select the "Change" button at the bottom of the page if you wish to revise or cancel your order. This will take you to the previous screen where you can adjust your order, then select "Submit Order" again. Once you are satisfied with your order summary, tick the box to accept the total charge, then click on "Send Order".

**Fourth Step**: 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 Crystelle via email to reception@ePlanettrade.com or by phone 07 5437 7220.

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

**Future developments**: As this ordering system is developed further, you will be able to track the processing stages of your order, edit your order while it is still in pending status, and see when the order has been forwarded to your office address.

Product charges are listed below, as well as on the ordering system screen. All new licensees 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.

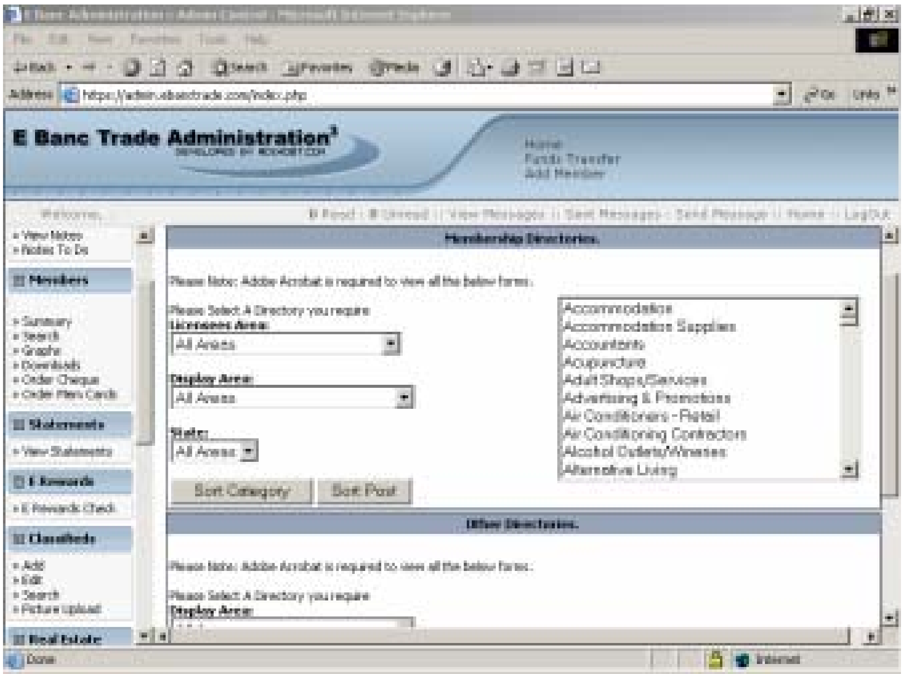
| | |
|---|---|
| **Membership Books** | $0 |
| **Directories** | |
| Part 1-Qld mailed | $5 |
| Part 1-Qld pick up | $2 |
| Part 2-Other States mailed | $5 |
| Part 2-Other States pick up | $2 |
| States other than Qld mailed | $2 |
| National mailed | $10 |
| National pick up | $5 |

| | |
|---|---|
| **Trifold Promotional Brochures** | |
| 1000 | $100 |
| 500 | $50 |
| **Sales presentation Kits** | |
| Bound Set | $25 |
| Inserts only | $15 |
| **Corporate Presentation Folders** | $1.70 |
| **Chambray Shirts** | $13.80 |
| **Embroidered E Banc 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 |

**c. Directory Centre**

You can download the membership directory by area and/or category. This is provided to you in a PDF format where you can easily print the details. You can also email the directory to a nominated email address.

- After selecting the area and/or category you can then sort by category or sort by postcode.
- You can also select an area and print a Specialised Directory: Contractors Directory – this includes all trades involved in building; a Restaurant and Accommodation Supplies directory; a Restaurant and Accommodation directory; or a Tourist Directory




You can also download the classifieds, real estate and 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)

**d. Publications Centre**

Allows you to view all of our current brochures and print material available from Head Office. Licensees can order as needed using the online ordering facility under Document Centre.
Included are: E Advantage Brochure; Q & As (available in English and Dutch); E Planet Trade Brochure; and the Membership Directory Cover.

**e. List Centre**

**Get Labels**

This allows you to print labels for members in your area selected by location (if you have multiple areas) and category (singularly or by groups).

Master licensees have further selection choices such as by regional area, and state or county. They can also select member address labels by typing the require account numbers, separated by a "," in the field box labeled 'Member List'. Master Licensees can further define their search parameters by selecting members who joined in a certain month and/or year.
All licensees and approved staff can further define their selection by ticking either: Hard copy members; email members; or all members in your selected search parameters.

Once all selections have been made, click the "Get Labels" button and the labels will display already formatted for Avery Labels L7160.

**Email List**

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

Country Master Licensees can select by region, then by licensee area. Licensees simply click on their licensee area. **You must click on your area even if it is the only one displayed**. The search can be further defined by selected a specific category or categories. 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 people 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.

You can then choose either "Email List" or "Sponsorships". By selecting sponsorships, only email addresses for sponsored members within the parameters you have selected will be forwarded to you. Selecting "Email List" will generate and email to you with the email addresses for all members within your selection parameters.

The email is forwarded to the address of the person logged into the Intranet and it will include a text attachment. Simply open the attachment, copy all the emails within the text file, then paste them into the BCC 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 'Procedures' in the 'Document Centre'.

**Fax Stream List**

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

Select your licensed area (**even if there is only one displayed**) then further define your choices by selecting a category/categories. Country Master Licensees can also select by region, then by licensee 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.

**Internal Email List**
*Head Office Use Only*
This is only visible to country Master Licensees and provides staff email addressed by type and location. First select the licensed area you require, then tick the appropriate boxes depending on who you wish to send the email to, i.e. you can select either licensee, admin, customer 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 need. Simple copy and paste them into the BCC box of your email software package.

**f. 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.

**h. Print Cheques**
*Head Office Use Only*
Cheque books that have been ordered will display in a list. Simply check the ones you wish to print, then select "Print Cheque Books".

**i. Newsletters**
Licensees and nominated staff can load their newsletters directly to the corporate website from this location.

**<u>It is important that you convert your newsletter to PDF</u>** using 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 table, the 'Upload New Newsletter' page appears. Newsletters can be uploaded by clicking on 'Browse' after the 'File Upload' field 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. The licensed area for which the newsletter has been created must be selected, then the 'Upload' button is pressed to 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.

**MEMBERS**

**a. 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.

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

**c. View Statements**
Enter the account number you wish to view, and select how many months prior and the members statement will show.

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

**e. 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.

**f. 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 E Planet Trade.

**TRANSACTIONS**
*Head Office Use Only*

**a. 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.

**b. Currency Convert**
Using the currency conversion rate, this will work out the conversion from one currency to another.

**E REWARDS** *(this is currently only available to Australian members of E Banc Trade)*

**a. E Rewards Check**
Enter the account number and it will show what accounts they have received E Rewards for.

**c. View Statements**

**d. Full**

**e. Signup**

**REPORTS**
(To be completed)

**AUCTION**
*Head Office Use Only*
Auction Admin

**CLASSIFIEDS**
**a. Add -** Simply complete all the data fields to enter a classified
**b. Edit –** Allows you to make a change to a classified or delete a classified

c. **Search –** Simply choose category and / or area to perform a search of a product on the classifieds
d. **Picture Upload –** Allows you to add a photo or picture to the classified

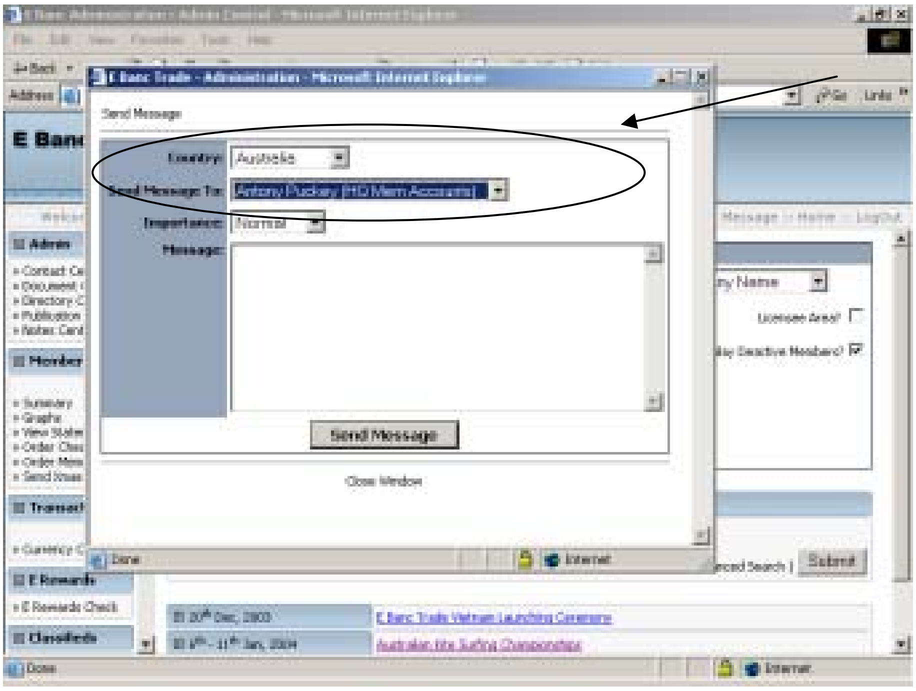
**REAL ESTATE**
**Search –** Allows you to search by area and / or category the different real estate listings.

**CATEGORY**
*Head Office use only*
a. **Add**

b. **Edit**

## 8. 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.

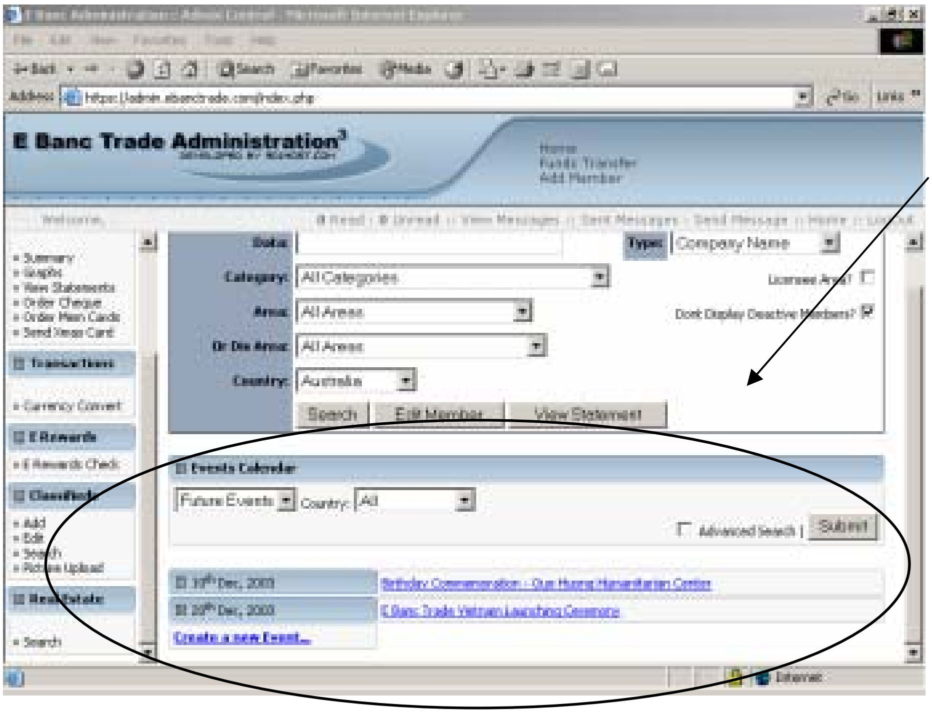
**View message**
When a message is sent to you a pop up box will appear "New message waiting". Click on 'view messages' to view all of your received messages. From this screen you can check the box to the side of each message after you have read it and wish to delete it. Once you have checked all the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

## 9. Events Calendar




The Events Calendar displays on the home page of the Intranet and provides a snapshot of upcoming events within the E Planet 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**
Licensees 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.

# IV 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 E Planet 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 Transaction

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.

***Please note this guide is in draft format only and is not complete***