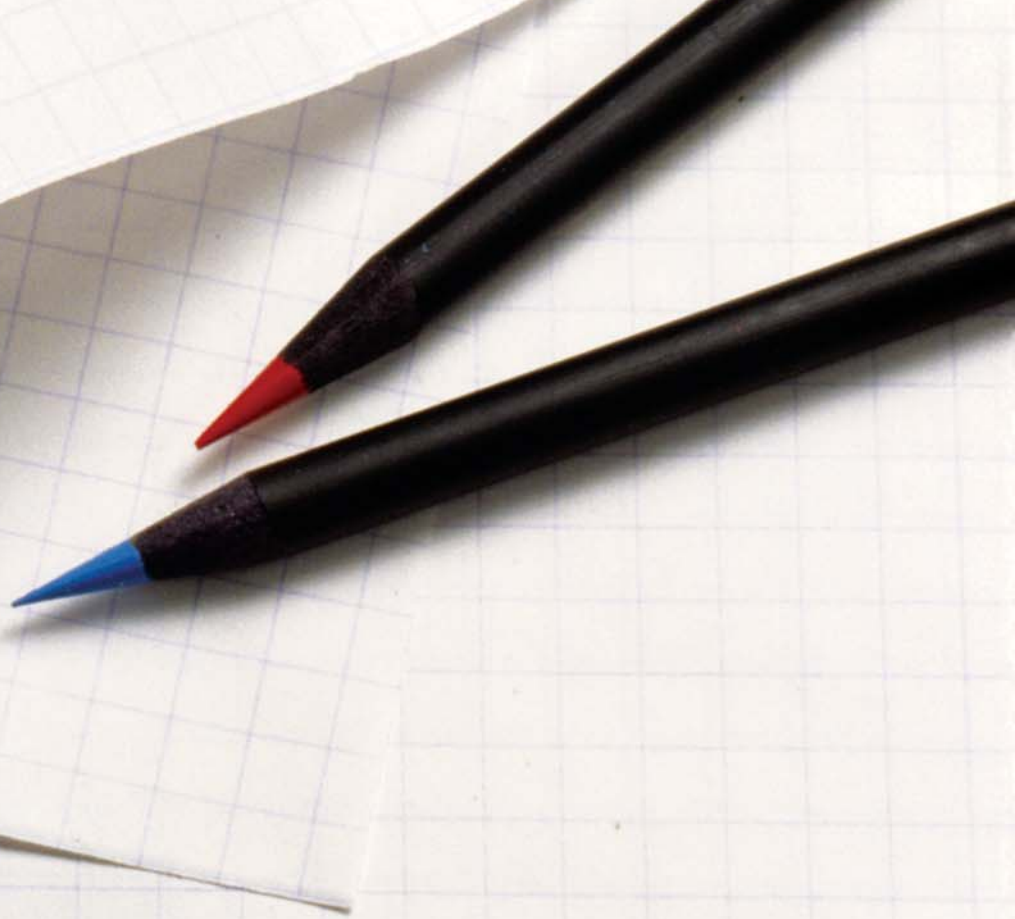




XO Limited



SOFTWARE TRAINING SCHEDULE WEEK 1

[www.barter-software.com]

DAY 1

Task	Notes	Outcome
Logging into the website	<p>How to log into the Administration part of the website.</p> <p>How to access the customer-part of the website.</p>	You will be expected to write down how to do this.
Adding a staff member	How to create an account for yourself on the administration pages	Each person being trained will have their own account set up.
Setting up commission rates for staff	<p>Each person must create one commission rate (any rates are fine).</p> <p>At least one commission rate must be set to "0".</p>	Commission rates for staff set up.
Creating a Broker	Each person must set their own account with an appropriate commission rate and set themselves as a broker.	Each person being trained will become a broker so that accounts may be assigned to them.
Create Fees	<p>Each participant will create:</p> <ul style="list-style-type: none"> 1 Joining fee 1 Annual fee 1 Monthly fee 1 Commission per Transaction Charge <p>The trainer will set up the SMS charge and show how it can be changed.</p>	<p>There must be at least one plan created with no fees.</p> <p>All fee plans set up. Each person will set up one option for a fee for each.</p>
Create Pricing Plans	<p>Group fees together into pricing plans</p> <p>Create pricing plans with the following names:</p> <ul style="list-style-type: none"> • No Fee Plan • Default Plan • Media Plan • Valued Member Plan <p>Create other plans as required or rename as required.</p>	All plans will be created by the exchange.

DAY 1

Set up default pricing plan for Pay Anyone	The trainer will set this default. It will probably be the NO FEE PLAN to start with.	Pay Anyone pricing plan is set up.
Set up Credit Limit options for customers	Set up the different credit limit options. Each person being trained will add one option.	All credit limit options added.
Set up Accepted Payment methods for customers	Register the ways customers can pay you for their joining fees and ongoing charges.	Payment methods entered.
Adding a HELP Note to the software	Create a help note (question a customer has asked) and write the response in the software so in the future other customers can look online to see the problem and answer. Each person being trained needs to create 3 help questions and answers. One must be edited once created and changed. Then delete al 3 created.	Everyone knows how to add text to the help file on the website. This will reduce the numbers of customers calling in and it is good practice to add answers to asked questions on the website.
Adding a FAQ Note to the software	Create a Commonly Asked Question and its answer. Create 3. Edit 1. Delete them all.	Everyone knows how to add text to the FAQ file on the website.
Editing the Welcome Page on the website	Edit the initial welcome page. Edit the logged in welcome page. This must be done one after another so that each person has the opportunity to edit the welcome pages.	Welcome page complete.
Editing the Contact Us page on the website	Trainer to get one individual to edit the contact us page on the website.	Contact us page is complete.

DAY 1

<p>Editing the Email Templates on the website.</p>	<p>Trainer to show everyone how to edit the email templates for the website.</p> <p>Each person being trained will be instructed to edit the following templates and add details of “THIS WEEKS SPECIAL” or an “IMPORTANT ANNOUNCEMENT” on them. This gives examples of how an exchange administrator would constantly keep the templates up-to-date to keep pushing latest offers to members of the barter exchange through all forms of communication with the exchange.</p>	<p>Email templates edited with examples.</p> <p>Test emails sent to the people being trained to show them how the emails appear.</p> <p>Email templates returned to normal.</p>
<p>Set up Privacy Policy for the exchange</p>	<p>Paste the exchanges privacy policy into the website.</p> <p>Trainer will get one person being trained to do this.</p> <p>If the exchange has provided no privacy policy a default one will be provided by the trainer.</p>	<p>Privacy policy complete</p>
<p>Set up Terms and Conditions for Exchange</p>	<p>Paste the terms and conditions of membership for the exchange into the website.</p> <p>Trainer will get one person being trained to do this.</p> <p>If the exchange has provided no terms and conditions a default sample one will be provided by the trainer.</p>	<p>Terms and conditions complete</p>
<p>Set up Address Layout for Exchange</p>	<p>Trainer will select one person to do this</p>	<p>Address details for exchange are set up correctly so when people register or view addresses they display appropriately for the country they are in.</p>

DAY 1

Set up the Currency for Exchange	Trainer will select one person to do this.	Currency set up for the exchange properly.
Other general setup	<p>Trainer will show on projector and will set the following:</p> <ul style="list-style-type: none"> - Content Management >> Supplier information – set whether to view supplier details if people are not logged in Content Management >> Show Empty Category – set whether empty categories (those with no products or listings in them) should show on the front-end of the software 	Basic exchange setup complete.

DAY 2

Account Management

Task	Notes	Outcome
Registering a New Account	<p>Each person must create 5 new accounts (test accounts) and apply for credit limits for them all.</p> <p>At least one account should have your own email address in it.</p> <p>You will need to write down the usernames and passwords created for each account.</p> <p>Create at least 1 account which pays via Credit Card. (You may use a fake credit card number).</p>	New accounts are set up in the system for each member to use throughout training.
Approve Newly Created Member Accounts	<ul style="list-style-type: none"> Approve each of the 5 accounts created 	Accounts approved
Assigning brokers to accounts	<ul style="list-style-type: none"> Assign brokers to each account Ensure that you are the broker for at least two of your accounts Assign other accounts to each other person who is being trained 	Brokers assigned to accounts
Assigning commission rates to accounts	<ul style="list-style-type: none"> Assign each account a commission rate Ensure at least one account has a commission rate set of ZERO for everything 	Commission rates assigned to accounts and accounts now able to be used
Sending welcome emails	<ul style="list-style-type: none"> Send welcome emails to each account As one account has the email address of the person who created it they should be able to check their email and see it come through 	Trainees now see what a welcome email looks like when sent to them
Requesting Plastic Transaction Cards (POS) for new account	Create a new plastic transaction card for each account (<i>they may already have ordered one when they applied for the account but please create a second one</i>) using XOADMIN	Plastic transaction cards ordered for each account
Receipting Payment for Membership Fees	Receipt payment for membership fees in XOADMIN	Membership joining fees no longer show as outstanding on the members account

DAY 2

Account Management

Document management	<ul style="list-style-type: none"> • Upload a document for each account • View a document from each account • Upload a second version of a document for an account (so there are two versions of the same document associated with the account) 	Documents are uploaded on each account
Assigning tasks and notes to account	<ul style="list-style-type: none"> • Create a note associated with an account • Assign the note to another person being trained • Create another note associated with an account • Assign the note to yourself 	Notes created
Actioning account tasks/notes	<ul style="list-style-type: none"> • View notes associated with yourself • Add follow up notes to these • Close notes 	Notes closed
Sending password reminder emails	<ul style="list-style-type: none"> • Send password reminder email for the account created with the trainees own password in it 	Trainees see what a password reminder email looks like
Logging in as the member to the customer-access website	<ul style="list-style-type: none"> • Log into the front-end as a member 	Trainee understands how to log in as a customer
Editing the members directory listings	<ul style="list-style-type: none"> • View directory listing • Edit directory listing and put listing under additional categories 	Trainee understands how to edit listings
Creating additional directory listings	<ul style="list-style-type: none"> • Create another directory listing for the member 	This shows the trainee how to create multiple listings as one member might offer two totally different services or run different businesses under the one account
Creating a product	<ul style="list-style-type: none"> • Create 4 different products as one member • Log in as a different member and create 4 more products 	Understands how to create products

DAY 2

Account Management

Creating a service	<ul style="list-style-type: none">• Create 4 different services• Log in as a different member and create 4 more services	Understands how to create services
Downloading the POS card report	Download the POS cards not yet sent to the printer Save file Open EXCEL Import file and view	Understand how to download and view POS Card file to get them printed

DAY 3

Transactions

Task	Notes	Outcome
Manual Transfers	<ul style="list-style-type: none"> Manually transfer 100 barter dollars from one members account to another members account Manually transfer 50 barter dollars from one members account to another members account 	
Reversals	Reverse the 100 barter dollar transaction	
Partial Reversals	Reverse 10 barter dollars from the 50 barter dollar transaction	
Changing fees on a transaction	Change the fees on a transaction	
Adjustments	<ul style="list-style-type: none"> Add a manual fee to an account (credit) Add a manual fee to another account (debit) 	
Printing copies of a transaction	<ul style="list-style-type: none"> Search for the manual transfer of 100 barter dollar transaction View a copy of the transaction 	
Emailing copies of transaction	<ul style="list-style-type: none"> Search for the manual transfer of 50 barter dollars View a copy of the transaction Email a copy to yourself Check email to see that it has arrived 	
Emailing an account statement	<ul style="list-style-type: none"> View account statement for a member Email a copy of account statement to yourself 	
Downloading an account statement	<ul style="list-style-type: none"> Download a copy of an account statement of a member Open in Excel and view 	
Batching account statements	<ul style="list-style-type: none"> Create a monthly batch of account statements 	
Bulk emailing account statements	<ul style="list-style-type: none"> Email batch of account statements to all members 	

DAY 4

Member Transactions / Front End

Task	Notes	Outcome
Manually transferring funds between accounts through front-end	<ul style="list-style-type: none"> Log in as a member of the barter exchange Send a \$100 payment to another member 	
Request a new POS Card online	<ul style="list-style-type: none"> Request a new POS card online Note the card number which is generated and the expiry date 	
Debit a POS card online	<ul style="list-style-type: none"> Log in as a different member Debit the first members POS card for 50 barter dollars 	
Creating a product listing online	<ul style="list-style-type: none"> Log in as each of the four accounts you have created and create a product listing for each one 	
Creating a service listing online	<ul style="list-style-type: none"> Log in as each of the four accounts you have created and create a service listing for each one 	
Viewing listings	Browse listings	
Asking questions about a listing	<ul style="list-style-type: none"> As a question about one product you have created on another member account 	
Answering a question	<ul style="list-style-type: none"> Log in as the account which has the question asked and answer the question 	
Buying a product online	<ul style="list-style-type: none"> Purchase a product online Log in as the seller and confirm the purchase Set the shipping rate 	
Downloading account statement	Download account statement and view	
Disputing a transaction	Purchase a second product online Log in as the seller and confirm the purchase Log in as the buyer and dispute the transaction Log into XOADMIN and cancel the transaction	

DAY 5

Communications

Task	Notes	Outcome
Downloading Client List With Trading Report	<ul style="list-style-type: none"> Each trainee downloads their own client list with trading report 	
Identifying Businesses which need promotion	<ul style="list-style-type: none"> Identify which members need barter Identify which members need to spend barter 	
Send targeted emails to members in a certain city	<ul style="list-style-type: none"> Send emails to members within a certain city promoting another member who needs barter dollars or is a new member 	
Send targeted emails to members with a certain account balance	<ul style="list-style-type: none"> Send emails to members who are in credit telling them about some members who are in debit 	
Send targeted SMS messages to members	<ul style="list-style-type: none"> Send SMS messages to all members Send SMS messages to one member Send SMS messages to members with more than 100 barter dollars in their account 	
Send targeted SMS messages to staff	<ul style="list-style-type: none"> Send SMS message to all staff Send SMS message to one staff member 	
Schedule a SMS message	<ul style="list-style-type: none"> Schedule a reminder about an upcoming networking meeting Cancel the reminder 	
Create a newsletter	<ul style="list-style-type: none"> Create a newsletter Add those members who are in debt to the newsletter Add some products and services to the newsletter 	
Schedule a newsletter	<ul style="list-style-type: none"> Schedule the newsletter to go out weekly Email yourself a copy of the newsletter 	
Cancel scheduled newsletter	<ul style="list-style-type: none"> Cancel the scheduled newsletter Create another real newsletter Leave scheduled 	Newsletters scheduled from now on

DAY 5

Communications

Edit welcome page of the website	<ul style="list-style-type: none"> • Edit the welcome details of the website to specifically promote some new members who need trade 	
Edit the email templates of the website	<p>Edit the email templates to promote members who need trade. Specifically the:</p> <ul style="list-style-type: none"> • Password reminder email • Transaction record emails • Welcome email (new account) • Buy and sell online confirmation emails • Item question/answer emails 	
Create a custom trading report for a member	<ul style="list-style-type: none"> • Create a custom trading report • Email the trading report to yourself • Print the trading report 	