User Guide

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THE SECTIONS of this user guide referring to the usage of the CES web site are compiled out of the help pages of the site. For this reason they read as if you were looking at the screen of your computer rather than at a separate manual. The help pages are what display when the [Help] button is clicked to provide contextual information for a particular page of the site.

Using the help pages keeps the User Guide up to date as they are generally updated

when any changes are made to the related web page.

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What is the Community Exchange System?

The Community Exchange System (CES) is a community-based, global trading network using a money other than our familiar national ones — an alternative, parallel, local, community or complementary currency system. In short, the CES is a new money system.

There are many similar trading systems around the world, commonly know as Community Exchanges, Local Exchange Trading Systems (LETS), Mutual Credit trading systems or Time Banks. Many commercial 'barter' systems operate in a similar way, but their prime motive is make money of the conventional kind whereas most complementary currency systems are attempts to do without or replace national currencies.

The main difference between these and conventional money systems is that the scope of the money is usually restricted to a geographical area or organisation. Money in the above types of complementary currencies does not 'exist' like conventional money so there is no need for a supply of it and you don't need any to start trading. Money in these systems is a retrospective 'score-keeping' that keeps a record of who did what for whom and who sold what to whom. There can therefore never be a shortage of money and money does not have to be created by a third party (banks or government) outside the circuit of buyers and sellers. For this reason money and credit are free, for the buyers and sellers 'create' it at the moment of trade.

There are many different types of complementary currency systems (CCs) and they are growing in popularity throughout the world. Some use 'hard' currencies, where notes and coins are issued by the group for their own use; others use time as a currency rather than notes; and yet others use a 'virtual' currency which is the recording of the values of goods and services exchanged.

Complementary currencies foster the real wealth of communities and rebuild a sense of worth and self-esteem among their users. Around the world they report an increased sense of vitality in all sectors of the communities using them. While these trading systems might have a slightly different function for each of these sectors, it certainly has relevance to all.

From child care to karate lessons to phone companionship, to computer programming and gardening, there's no limit to the ways of earning money in these systems. In this way a community currency acts like a supplementary currency, creating an additional stream of value in a community. By supplementing conventional cash flow with a local currency, a community can maintain full employment and protect itself from changes and fluctuations in the national money supply.

I help you, and you help another—and someone else helps me. The recipients of help become, in turn, the providers of help. What goes around comes around. The currency you earn by helping others can be used to receive services or help from someone else and buy goods on offer. When you spend your community currency, someone else earns it.

How does it work?

CES exchanges compile and distribute a directory of goods and services offered by the traders registered with them, as well as a list of their 'wants' or requirements. When a trader requires something advertised in the directory the seller is contacted and the trade takes place. The buyer 'pays' the seller with the community currency. This usually involves the handing over of a cheque-like Trading Slip that records how much the buyer is paying for the goods/service delivered. The Slip is either handed by the seller to a group administrator who will enter the amount into a group account, or the information is recorded directly by the seller on a central computer 'bank'. Sales are recorded as credits for sellers and purchases as debits for buyers. The central book-keeping system records the relative trading positions of the traders. Those in credit can claim from the community goods and services to the value of their credit and those in debit owe the community goods and services to the value of their debit.

Traders receive a regular newsletter and statement of account that lists their trades and gives their balance at the end of the period. Information about the trading position of others prevents unscrupulous buyers from exploiting the system. News about the group assists in building links and enhancing the sense of community.

Is this a form of Barter?

No! Barter almost always involves bargaining between two individuals to establish the relative worth of the goods or services they wish to exchange. There is no bargaining with a community currency. When you purchase something you are in no way obliged to the seller; you 'pay' for what you have received by delivering/selling something at a later time to another trader in the community. Community currencies are as versatile as conventional ones.

Is this just a tax dodge?

Definitely not! Our motives are noble. We want to create a more equal society where wealth is distributed according to contribution, not according to your ability to 'make money'. In other countries where these systems have become big, the state has either ignored the tax angle because it saves state expenditure on welfare payments, or there is an agreement to provide services to the state. Our approach is that when the CES become big, the state should become a user of the CES and participate in the normal way. In this way the state could credit itself through the services it provides to all members and debit itself by purchasing the services of CES users.

Can I only trade with members of my own exchange group?

The CES is an international trading network with exchanges in many countries. Credits earned in one exchange can be spent in another, or if you are visiting another area you can trade with local CES traders. New exchanges are starting in new areas all the time, and existing ones are growing steadily.

What other benefits are there in using a community currency?

One of the reasons we took the initiative to launch this project is that it is in line with New Economics thinking. New Economics is about rebuilding society using alternative/sustainable economic policies and practices. Community currencies fall into this category because they are instrumental in:

- **Mobilizing the Real Wealth of a Community**: The knowledge and skills of its people is the real wealth of a community. Conventional money drains away while a local currency keeps this wealth working in the community, generating employment and income for all involved. People who have accumulated a wide range of skills and abilities suddenly become once again highly valued members of the community.
- **Fostering Self-Reliance & Self Esteem**: In our communities unemployment is growing and increasing numbers of people are unable to get their needs met. Single-parents may need respite care or other services for their children. Elderly pensioners also need a range of specialised services or may simply require company to combat loneliness. At present a person's ability to access these and other services is proportional to their purchasing power. The community currency system breaks this bottleneck, by making it more possible to match someone's need with another's available labour. People are no longer dependent upon welfare or charity, and everyone's self esteem benefits.
- **Increased Personal Savings & Disposable Income**: Because members can get local goods and services through a community currency, they can substitute it for the national currency. Disposable income in conventional money, available after basic needs are met, actually increases. Those who regularly trade with community currencies will find they have more money left in their pockets at the end of each week. The rate of community savings, and therefore of community investment and capital generation, will improve. This will result in an improvement in the quality of life for everyone.
- **Creating Local Economic Control**: Local currencies help to plug the leaky bucket of the local economy. By creating a local currency that cannot leave the community, uncontrolled and activity-limiting capital outflows are reduced. As a community currency only has value in the community in which it is generated, it continues circulating to create more wealth for everyone. They give community members a powerful new tool with which to "steer" the local economy in directions which benefit everyone.
- **Building Community Support Networks**: Because community currency systems plug members into a local information network, they provide new or isolated residents with an instantaneous community support system. This avoids the embarrassment of introductions to strangers. Through a CES/LETS network all members have a ready reason for calling for support or help. Elderly pensioners, unemployed youth, supporting parents, new arrivals, and single-income families with partners trapped in a dormitory suburb can all build firm friendships on relationships established through a functioning network.
- **Fostering Social Justice & Equality**: Because the value attached to one's time and commitment is set individually by participants, a community currency equalises the wage differentials that exist in the conventional economy between the work of women and the work of men. This greater equality helps prevent the polarisation of the community "haves" and "have-nots". There is no point in accumulating community currencies as they do not earn interest. It is only by putting them to productive work that the individual or community benefits. Community currencies foster participation at all levels in the local community.
- **Building a Sense of Community**: The increasingly transient, temporary and mobile lifestyle in the world today has seriously damaged our sense of belonging to a meaningful community. Because a community currency builds local relationships it is a powerful means of regenerating a sense of trust among members, a necessary component to the health of any community. As communities become more self-aware and self-reliant through the use of a community currency, isolation, fear and

loneliness diminishes and everyone benefits.

- **Keeping Wealth Where it is Created**: National currencies always leak away to the 'money centres' creating money deserts and a reduction of local economic activity. Complementary currencies, on the other hand, are community based and so keep wealth where it is created. Where previously economic activity was stagnant, the local currency stimulates trade and permits things to happen where formerly there was no economic activity. By circulating in a community the entire community becomes self-sufficient and does not have to rely on external businesses to provide what is required.
- **Bringing the 'Money Power' Back to the Commons**: The money we use in our daily lives is provided by the corporate financial system as a profit-making enterprise, not by the government as a public service to the community. As such, the money we use does not belong to the commons and so we have little control over how it is spent and who it benefits. A community currency brings the 'money power' back to the people because its users can decide how that power is exerted.

How Does the CES Work?

The object of the Community Exchange System (CES) is to facilitate trade without using our conventional national currencies, and build a sense of community at the same time.

By 'trade' we mean the normal economic activity of selling goods and providing services by 'producers', 'sellers' or 'providers', and the purchase of these by 'buyers', 'customers', 'clients', 'patients', 'consumers', etc.

The CES serves two basic functions:

- it is an online money and banking system
- it is a 'marketplace' where people advertise and sell goods and services

Although the CES is internet-based it also works for those who do not have computers. Each user gets an account number and a password, and this gives them access to their account on the CES web site. The site works like a true on-line banking service. Users can view their current balances and obtain statements of account. They can also keep track of the trading position of others.

Goods and services are advertised on the web site through an 'Offerings List'. Users look through this list, or do a search, and if they find anything they want they contact the seller who then provides the goods or service. Transactions are recorded by the seller, who enters the information through their online account or gets it entered by a co-ordinator. This credits the account of the seller and debits that of the buyer. Accounts record these debits and credits, giving a balance after each transaction.

Those without computers can interface with the system through their co-ordinators or through 'branch offices'. All information is available on paper and transactions can be effected using Trading Slips (cheques). These are handed to the co-ordinator by the seller who enters the information into the system.

To ensure that unscrupulous buyers do not exploit the system, details of each user's overall trading position are available to all. General trading statistics are also available to show how much trading is taking place.

There is also a 'Wants List' where users can advertise for goods and services they require.

Trading in this system requires no supply of money, either by the community as a whole or by each participant. Instead of using a 'hard' currency, which then has to be allocated

according to some formula, the currency of this system is the pure recording of the values exchanged in trade. Money in this system is thus created at the trading interface and is recorded as credits for sellers and debits for buyers.

There are CES exchanges in a number of countries around the world. Each exchange has its own currency but members of one exchange can trade with members of other exchanges, making CES currencies as versatile as our conventional currencies.

The local currencies are units of measure rather than tradable commodities like conventional currencies. However, to make these currencies meaningful to users, their value is based on the national currencies. This is purely to give them reference. They are in no way tied to the national currencies and will deviate from them over time.

There are no rules for pricing in the CES. The 'law' of supply and demand prevails. However, within the context of the CES, certain services that otherwise would not be highly valued, might increase in value because of their relative shortage. Other services that outside the CES are expensive might be cheaper in the CES because the provider wishes to attract custom.

The Community Exchange System Web Site

The CES web site provides two essential services:

1. It serves as the 'bank' where details of trading transactions between account holders of the Community Exchange System (CES) are recorded.

2. It is a 'marketplace' where CES users advertise their offerings and wants.

The site also provides many other functions and features, but these are all related to the two above services.

After entering your Account Number and Password on the CES home page you are presented with your own personal 'Home page', from where you can access all the functions, features and facilities of the site. From any other page you can get back to your account Home page by clicking on the [Home] button at the top or by clicking on the logo at the top left.

The features and facilities of the site are accessible through two sets of menus on your Home page:

- a horizontal set across the top (this set is constant across the site and always available)
- a vertical set in the middle (this changes on subsequent pages)

The horizontal menu provides information about the 'marketplace': users, offerings, wants, announcements etc.

The vertical menu in the centre gives you access to your personal 'bank' account. This is the heart of the system where details of all transactions are recorded.

To obtain more information about any page, click on the [Help] button on the right of the horizontal menu. When you have finished a session on the site please Log Out by clicking the red button at the top right. This will ensure that no one can get access to your account by pressing the Back button of your browser.

CES Concepts

The following are the main concepts that relate to the CES. Become familiar with these concepts as they are widely referred to throughout the site, in this user guide and in other CES documents.

Exchanges

Exchanges are the organisational units of the CES. Each exchange is a discrete trading unit operating independently of other exchanges. The CES is a network of discrete exchanges around the world. What links them is the use of the CES software, which allows inter-exchange trading. Each exchange has its own separate database but what all share is the same software interface accessible through the internet.

Each exchange has its own name, its own currency, its own users, its own policies, its own rules and regulations and, usually, its own newsletters and insignia. All CES exchanges, however, operate within the overall framework of the CES and are required to comply with CES regulations with regard to inter-trading and global monetary policies.

An exchange can operate in 'stand-alone' mode, meaning that it has no links to other exchanges whatsoever. However it is more usual for exchanges to operate in 'network' mode. This means that the traders of one exchange can trade with those of other exchanges, and they are able to place advertisements on the lists of other exchanges.

It is also possible for the administrator to set at the individual level whether an account holder can trade with others in other exchanges.

Scope of Exchanges

Geographical vs organisational

Most CES exchanges are geographically based, that is, they operate in a defined local area such as a rural community, a town, a suburb or an entire city. The CES is essentially a community based system aimed at keeping the wealth created by its users in the communities where they live.

However, an exchange can be organisationally based and not necessarily linked to any specific geographical area. Some examples of organisationally based exchanges are:

• an association of organic farmers
• an organisation of natural health practitioners
• a collective of open source software developers around the world
• believers of a particular faith
• a company with branches or franchises in different places
• an organisation with branches or allies in different places

Members vs Users

The CES is a new money system, not a club or organisation. As such those who use the CES are its users, not its members. New users do not 'join' the CES but register to use the system and are in there for life, just as they are in the official money system for life. We are 'registered' to use the official money system when our parents register our births and do not consider ourselves as opt-out members of a club when

we use that money system.

Users can of course de-register from the CES if they want to, but as there are no renewal requirements they are not automatically ejected after a certain period of time.

Other terms that can be used for CES users, depending on context, are: traders, account holders, buyers & sellers, participants, advertisers.

Account Types

The CES has six account types, often referred to as 'membership types': individual, shared, organisation, company, public and administrator.

Most users of the CES have **Individual accounts**. Such accounts are in the name of a single individual and the named person is held responsible for the account.

Shared accounts are joint accounts used by a number of people, usually members of a family. Most often a Shared account is in the name of a couple but it could be in the name of the family or in the name of one person in the family. The CES does not define a family but those named in the account profile are collectively held responsible for the account.

An **Organisation account** is an account for organisations. The CES does not define an organisation but it is any collective that is not profit-pursuing, that does not provide products for sale and is essentially service oriented. The account is in the name of the organisation with a named contact person. The 'management' of the organisation is held responsible for the account.

A **Company account** is for companies. The CES does not define a company but it is an entity that is essentially profit-pursuing and explicitly providing products or services for sale. The account is in the name of the company with a named contact person.

Public accounts are like Organisation accounts except that the full statement of account is visible to users. Public accounts are for entities that need to operate transparently. Usually such accounts are related to the Administration account (e.g. a market account) and show their statements so that users can be sure that 'public money' is not being mis-spent.

Administrator accounts are a special account type that gives those designated access to the full administrative interface. Usually there is only one Administrator account and this is account number '0000'. This 'number zero' account is different from all other accounts in that the levies that accumulate in the special 'Treasury account' can be transferred to it. There can however be more than one Administrator account if more than one person is authorised to work on the administrative interface. Administrator accounts are also 'public' accounts (see above).

Buyers and Sellers

As a trading system, the primary relationship of the users of the CES is that of buyers and sellers. A user is a **seller** if something is being sold, whether it is goods or services; a **buyer** if something is being bought, purchased, received. Other terms for buyers and sellers are producers and consumers, vendors and vendees, providers/suppliers and customers/clients/patrons/shoppers/patients etc.

What distinguishes a seller from a buyer in the CES is that after a trade has taken place, the record of the trade credits the seller's account (it goes up) and debits the

buyer's account (it goes down).

A CES **trader** is a user that has either sold or bought (i.e. engaged in a trade).

Seller Enters Transactions

In the CES it is the seller who records trades, not the buyer. This might seem counter-intuitive at first but if you think about it, it is the only way it can work.

- When sales take place buyers neither give their sellers anything nor are they obligated to them in any way. In other words the buyer does not 'pay' or owe the seller anything in the conventional sense; 'payment' is made by the buyer delivering something to someone else in the community at a later time. Buying sets up an obligation and it is this that binds users together. A buyer with a positive credit balance indicates that the buyer has already 'paid' for the purchase by delivering something to someone else at an earlier time.
- The seller entering the transaction is also an acknowledgement that the CES is not a bartering system where the trading relationship is directly between buyers and sellers. All transactions are indirect in that we 'pay' for what we receive by doing or giving something to someone else. Debits are not a 'promise to pay' as in the conventional money system, but a 'promise to sell'.
- Trading through the CES is similar to trading with a credit or debit card in the conventional economy. When you present your groceries at the checkout of a supermarket, it is the supermarket (the sales assistant) that enters the transaction. Your credit or debit card is not money; it is just an ID. Swiping your card debits your account and credits the account of the supermarket. Imagine if it was the other way around: you (as the buyer) took your groceries home and the supermarket had to wait for you to enter the transaction through your internet banking account. That would never work and the supermarket would have to employ an army of debt collectors chasing customers to enter their transactions!
- When you deposit a regular check at the bank, you are doing so as the seller. The bank teller enters the amount into the computer, which credits your account and debits the buyer's. The cheque is not money, it is just an order to the bank authorising the debiting of the buyer's account and the crediting of yours. CES trading slips perform the same function when they are handed by the seller to the administrator or a co-ordinator, who enters the information into the computer on your behalf.
- As there is no exchange medium in the CES, all that needs to happen after a sale has taken place is that a record has to be made of it. There are three parties who could enter the details: the buyer, the seller or a third party such as the administrator. If the buyer were to do it the details would likely never get entered as it is not in the interest of buyers to debit their own accounts. Sellers would have to remind their buyers to enter the transactions and after a time they might even forget, resulting in what amounts to theft on the part of the buyer. Tardy transaction entering on the part of buyers would result in a lot of frustration for sellers. If buyers entered transactions sellers would also have to send invoices to their buyers, creating an extra step that is not really necessary. If the seller does it then it is in the interest of the seller to enter the transaction as quickly as possible, as it credits his or her account. If the seller never does it then it is only the seller who is to blame. Even if the buyer benefits by not having his or her account debited, the buyer can never be accused of theft.

- When the seller enters transactions there is no need to send an invoice to the buyer, unless a firm price could not be given before the delivery of the goods or service. When the buyer approves or 'signs off' delivery, the seller can enter the transaction and there is no need for any further correspondence. An enormous amount of time and effort is eliminated by not having to issue invoices. This speeds up the settling of accounts, eliminates frustration and the need to chase debtors, and cuts out standing in bank queues.
- In the conventional economy banks would never allow sellers to credit themselves, as the conventional banking system is so open to dishonesty, fraud and corruption. In the CES, on the other hand, dishonesty is much more difficult so it is possible for sellers to directly credit their accounts. It is also a testimony of the trust inherent in CES trading.
- Another reason why it is important that sellers enter the information is to create or preserve the sense of belonging, obligation and community. When a buyer 'gives' money to a seller, there is a feeling of completion after the goods or service has been delivered. The buyer has 'paid' the seller and no longer has to think about it. This is why people living in well-off areas do not know their neighbours: they don't need them. Everything can be bought from anonymous suppliers outside the community. When sellers enter the transaction information buyers are left feeling obligated to the community by the knowledge that they have to 'pay' for what was received by selling something themselves. It is this feeling of obligation on the part of buyers and the knowledge by all that they need each other that creates community. Conventional money destroys it.
- When sellers credit their own accounts the trading relationship is in many instances turned upside down. In the conventional money system, for example, employees are dependent on their employers for their wages or salaries. This gives employers great power over their employees. In the employer/employee situation, the employer is actually the buyer and the employee is the seller. In the CES employees are able to credit their own accounts, according to an agreement established between the two as to amount and date when this can happen. This dramatically changes the relationship between employees and their employers, for the former are now not beholden to the latter. Provided they have given their services as per the agreement between them, sellers can credit themselves irrespective of their employer's standing. Employees in the CES are greatly strengthened in relation to their employers and able to see what their employer is earning at their expense.

Trading Agreements

As buyers' accounts are debited by sellers, buyers should establish agreements with their sellers regarding when their accounts may be debited if they feel there might arise a dispute over the amount debited or there might be dissatisfaction with the goods or service provided.

When purchases are small, buyers do not in most instances require an agreement with their sellers. Acceptance of the goods or service by the buyer is usually sufficient authorisation for the seller to debit the buyer's account.

When purchases are larger, it is not good practice for buyers to allow sellers to debit their accounts without authorisation. Buyers should establish agreements with their sellers before a sale takes place. An agreement should consider what amount will be

debited after delivery and what constitutes authorisation for the seller to debit the buyer's account. In many instances it is not possible for sellers to give a firm price, especially when providing services at an hourly rate (e.g. building work, mechanical repairs). In such cases the traders need to agree what will happen if the price is too high or what to do if it appears that the price will be beyond expectation. The agreement should also state how the buyer will authorise the buyer to enter the trade (i.e. debit the buyer's account). It should further consider how the trading parties will resolve a dispute or if the buyer is dissatisfied with the goods or service.

Agreements can be verbal or written. The CES site provides various tools to facilitate agreements. The Invoice facility allows the seller to send the buyer an invoice indicating the price for the goods or service provided. If the buyer is in agreement with the price and satisfied with what has been received, an electronic or paper Trading Slip should be sent to the seller. This is the buyer's acknowledgement of receipt, token of satisfaction and signal to the seller that the trade may be entered. The seller should not enter the trade until the Trading Slip has been received.

Credit and Debit Limits

Default credit and debit limits can be set by the administrator. This means that each new account is created with the default limits. Limits can also be set for any particular account. Heavy traders might require higher limits, while traders with excessive debits can have their limits lowered.

Credit and debit limits do not affect the functioning of accounts in any way. It is up to other traders and the administrator to monitor users who develop excessive debit and credit balances. Those over their limits are listed on the site, and calling up any account holder's trading record will also show if a limit has been breached.

Transaction Levies

The CES comes with a built-in levy system that can optionally be used. The transaction levy mechanism deducts a small percentage of every transaction entered. The levy is deducted from both the sellers' and the buyers' accounts and accumulates in a special 'treasury' account. The levies can be called back into the system by the Administration when and as required. No other account may directly receive the levies.

The levies serve as a source of revenue for the Administration and so could be seen as a form of 'taxation'. It is better to see them, however, as a system of service or usage fees. Any exchange needs revenue to operate and this is the best way to do it.

Many new exchanges feel that they still need a supply of official money for operational costs but usually it is better to recruit to the exchange the providers of the services that are more usually purchased with official money. That way dependence on the official money system is reduced and the feeling that the new money system is secondary to the official one is eliminated.

Sub-Areas

A sub-area is a sub-division of an exchange, usually a geographic sub-division but it could also be a sub-division of an organisation or company.

Geographic sub-areas:

A geographic sub-area is an area of approximately 5 km in radius with which those

living in the area identify. It could be a small town adjacent to other towns but in a larger urban context it is often an area that is physically defined by geographical or man-made features, such as rivers, hills, green belts, railway lines, motorways and urban boundaries.

Users identify with the area either because it has a name they share or because the area has a character distinct from adjacent areas. Above all it is the area where they are most likely to trade.

Organisational sub-areas:

An organisation or company that has created an exchange for its members/employees can also define sub-areas. These might be defined in terms of the organisation's own sub-divisions or branches which might or might not have geographical reference.

Local Area Co-ordinators

Local Area Co-ordinators are trusted users who are granted the ability to manage the accounts of others without having to know their passwords. In a sense they operate as 'branches of the bank' for those who do not have computers and those who do not wish to or are unable to manage their own accounts.

They are 'local area' because the aim is to have at least one co-ordinator in each sub-area to service those who do not have direct access to a computer.

The administrator grants co-ordinator status to users simply by marking them as such in their account profiles. Co-ordinators have access to a special co-ordinator's interface through their normal accounts. This is a cut-down administrative interface providing them with all the tools they need to manage the accounts of others. They are able to enter trades, offerings, wants, announcements and perform other actions such as printing out statements and offerings and wants lists. The interface also gives them access to a range of forms that can be printed for those who prefer to deal with paper.

Membership Fees

As the CES is a new money system and not a club, the charging of 'membership fees' is discouraged. Many former LETS groups that have joined the CES network continue to charge fees or subscriptions to cover operating expenses.

While it is legitimate to charge conventional money where expenses have been incurred in such money, doing so has a number of negative consequences, especially when it comes to membership fees.

Firstly, membership fees imply that the person or entity paying them becomes a member of some kind of an organisation, and that not paying them means exclusion from the organisation or termination of membership.

Fees thus make the organisation exclusive. Those who cannot afford the fees cannot take advantage of the services offered by the trading system.

Exclusiveness creates a 'clubby' feel where members feel they are part of a closed group on the basis of having paid a certain amount of money. By not paying their 'subs' they are automatically excluded, leaving a trading legacy that may impact detrimentally on the rest of the group.

An exchange organised as a club also requires all the paraphernalia of clubs: a

constitution, a committee, AGMs, rules, the collection of subs etc. These activities take a lot of time and effort and are not really necessary for successful trading.

Taxation

The CES is not designed as a tax dodge. The CES web site is merely a tool to facilitate trade without resorting to barter or official currencies.

The answer to the question of whether to make contributions to the tax authorities is left up to the users of CES. The CES is thus not responsible for users' tax commitments.

Viewed from another angle, trade in the CES does not involve the use of 'legal tender', which is how money is defined in most legal codes. In terms of conventional law the CES consists of people doing each other favours and no 'money' changes hands.

Another way of looking at it is that CES users would be happy to pay tax but it would have to be in CES currency. In other words the state should become a CES user and accept taxation in CES credits. The tax revenue could be spent back into the community by purchasing goods and services from the community. This is surely better than receiving nothing in return for the provision of services in the case of those who cannot afford them.

Sales, Purchases and Trades

Following from buyers and sellers above, a sale is an action performed by a providing party (seller) for a receiving party (buyer) and is recorded as a credit for the providing party; a purchase is the receiving of the consequences of the provider's action and is recorded as a debit for the receiving party. A trade is a record in the database that links the buyer and seller and records the amount (price) and description of what was provided and received. Simpler still, a trade has taken place when a buyer receives something from a seller and it is recorded in the database.

Sales and purchases thus each have two components: an action component where something is provided/received and a recording component where one account is credited and the other debited. Any action that has the recording component missing is not a trade.

Balance of Trade

As CES exchanges can trade with each other, each exchange has a balance of trade with the exchanges that its users have traded with. As with users in their own exchanges, exchanges can also be in debit to the entire system while others can be in credit. Administrators need to watch their balance of trade and deal with remote trading appropriately if the credit or debit balance is drifting too far from balance (zero) for too long.

Conversion rates

Most CES exchanges base the value of their currencies on their local official currencies. As such the standard of value differs from country to country. In order for international trade to take place and for traders to make sense of prices in other countries, the CES applies conversion rates between the different currencies.

These conversion rates are based on the money market exchange rates of official

currencies though they have been adjusted to make the rates in 'emerging market' countries more realistic. Also the CES conversion rates are not subject to the regular fluctuations of money market rates.

The appropriate conversion rate is automatically applied whenever a trade takes place between two exchanges having differing rates. The site also displays all conversion rates as well as provides a conversion rate calculator.

CES Terminology

As the concept of money in mutual credit trading systems such as CES and LETS is very different to the concept of money in conventional money systems, it follows that the terminology we use around money is also different. Practically every term that we use acquires a different meaning in the CES context. We could invent new terms but it is easier to use well-known terms but we should avoid unthinkingly using them and always consider their meaning in the CES context. Some terms take on new meanings while others can be dropped as they become meaningless.

Take, for example the word 'pay'. As trades in the CES are followed by the recording of those trades, nothing is transferred from the buyer to the seller. The buyer thus does not 'pay' the seller so the term 'pay' is redundant in CES terminology. It is better to use the terms 'debit' and 'credit' rather than 'pay' and 'receive'.

As CES 'money' is just the numeric component of a trading record in a database, the number is a measure of the value transferred rather than the measure of the quantity of something given in exchange. The particular currency name of an exchange is thus the name of a system of measure and not the name of something that exists or is treated as something that exists. It is like a kilogram or a kilometre. These units have no value in themselves but are used to measure the quantity of something else.

CES 'money' is thus not something that is transferred or exchanged for goods and services received. There is no exchange medium in the CES. Only goods and services are provided and the action is one way: from seller to buyer. CES 'money' is purely a record of the value transferred or given by the seller to the buyer. The debit recorded for the buyer represents the buyer's commitment to the trading community or what the buyer owes the community for what he or she has received.

The terms 'buy' and 'sell' thus need to be understood differently from the way they are conventionally understood. 'Buy' means to receive something and 'sell' means to provide something. There is no exchange of goods/service for money, only a retrospective record of what was transferred. A trade is thus not an exchange of values but rather an exchange of an obligation for goods and services.

Remote Trading

How to trade with remote CES users

It is possible to trade with users of remote CES exchanges. This means that the list of offerings is not that of your exchange alone; it includes those of all users in all exchanges and the 'market' for selling your own goods and services includes all users in all exchanges.

Not only does this mean that the CES operates globally, it also means that new and smaller exchanges have a great range of offerings available.

While many offerings will be meaningless to remote users (e.g. you can't give a massage

to someone a thousand kilometres away!), remote trading means that new kinds of services can be put on offer, such as accommodation and lifts to and from distant places.

How it works

The problem with remote trading in the CES is that each exchange operates as a closed entity, as a mini-economy on its own. Every sale within the exchange represents a credit for the seller and an equal debit for the buyer. The sum of all credits must always equal the sum of all debits and the balance of all credits and debits must always equal zero.

Any direct trade with another exchange would mean a 'gain' or a 'loss' and this would upset the zero balance.

The solution is 'virtual members'. These operate as would a single human member with an account in each exchange. This member could buy and sell within a exchange and then 'carry over' the goods or services to another exchange and buy and sell them there. Instead of using humans we use 'virtual members', who for all intents and purposes operate the same as human members. They do not require an agent's fee however!

How to buy from a remote seller

First of all you need to know what is on offer. There are two ways to do this:

1. Go to the Offerings List by clicking on the [Offerings] button at the top. The list defaults to your exchange. To see what other exchanges have to offer select an exchange from the drop-down lists on the grey bar (to select an exchange in another country select the country first). This changes the Offerings List to that of the exchange selected. Either do a search or look through the categories to find what you want.

2. Another way to see the remote offerings is to go to the Statistics Page by clicking on the [Stats] button at the top. On this page click on the [View] Exchanges button at the bottom. This lists all the exchanges in the CES network. Choose an exchange by clicking on its name. This will bring up the exchange's information page. Click on the View Offerings [Go] button under the Actions sub-heading at the bottom. This will bring up the Offerings page for the exchange where you can search for offerings in the same way as if you were looking for offerings in your own exchange.

Having decided what you want to buy, click on the remote seller's name to obtain the contact details. Contact the remote seller and perform the trade in the normal way. In the case of long-distance trades this might involve shipping costs.

When you are satisfied with your purchase send the remote seller a Trading Slip. You can either send a paper one by post or, more conveniently, an online one. If you want a signed counterfoil to your paper Trading Slip, you will have to request the remote seller to sign it and return it to you.

When the remote seller enters the transaction information into his or her account, you will actually be debited against the local virtual member that represents the exchange group of the remote seller. This will not be reflected in your statement of account, however, which will show your trade with the actual remote seller.

How to sell to a remote buyer

If a remote buyer contacts you to provide or sell something (because they have seen your offerings or otherwise), perform the trade in the same way as if the buyer were local. If your goods or service have to be delivered using the post or some other delivery service, you will need to make prior arrangements for the payment of that if there are costs in the national currency.

Request the remote buyer's contact and account details. If you want to check the details to

make sure the buyer is genuine, go to the Members page and enter the user's account number or name in the 'Global search' textbox and press the [Find] button. This will bring up the user's profile where you can click on the any of the 'Actions' buttons to obtain more information.

You may have to make some arrangement about the time you will wait for a Trading Slip after delivery before assuming satisfaction and crediting yourself without one.

When you obtain the Trading Slip for the goods or service delivered to the remote buyer, go to the home page of your account and select one of the four ways to enter transactions.

If you chose '1. Enter Single Transaction (list)' you will be taken to the Enter Transaction page. Select the exchange that the remote buyer belongs to from the Exchange drop-down list. After the page reloads, select the remote buyer from the Buyer drop-down list. Fill in all the details as usual (Description and Amount) and press the [Submit] button.

If you chose one of the other options enter the buyer's full account number in the 'Buyer' textbox. Then fill in the other details as usual (Description and Amount) and press the [Submit] button.

If the details are correct on the Confirmation Page press the 'Confirm' button, or else press the 'Cancel' button.

You will be credited for the amount entered and this will be reflected in your statement of account as a sale to the actual remote buyer. The buyer's statement of account will reflect a purchase from you.

Notes on remote trading

Remote trading may be a little difficult to grasp at first, what with virtual members and remote buyers and sellers. However, if you think of remote trading as local trading with the virtual member representing the remote trader, then it simplifies the matter.

Remote trading is pretty much the same as trading locally, but several issues need to be taken into account: transportation costs for the shipping of goods to remote places, confirming the veracity of remote traders, lack of face-to-face contact etc. These are not major issues but need to be considered before engaging in remote trade.

Transaction Levies

The CES comes with a built-in levy system that can optionally be used. The transaction levy mechanism deducts a small percentage of every transaction entered. The levy is deducted from both the sellers' and the buyers' accounts and accumulates in a special 'treasury' account. The levies can be called back into the system by the Administration when and as required. No other account may directly receive the levies.

The levies serve as a source of revenue for the Administration and so could be seen as a form of 'taxation'. It is better to see them, however, as a system of service or usage fees. Any exchange needs revenue to operate and this is the best way to do it.

Many new exchanges feel that they still need a supply of official money for operational costs but usually it is better to recruit to the exchange the providers of the services that are more usually purchased with official money. That way dependence on the official money system is reduced and the feeling that the new money system is secondary to the official one is eliminated.

Local Area Co-ordinators

Local Area Co-ordinators are trusted users who are granted the ability to manage the accounts of others without having to know their passwords. In a sense they operate as 'branches of the bank' for those who do not have computers and those who do not wish to manage their own accounts.

They are 'local area' because they operate in a sub-area of the exchange. The aim is to have at least one co-ordinator in each sub-area to service those who do not have direct access to a computer.

The administrator grants co-ordinator status to users simply by designating them as such in their account profiles. Co-ordinators have access to a special co-ordinator's interface through their normal accounts. This is a cut-down administrative interface providing them with all the tools they need to manage the accounts of others. They are able to enter trades, offerings, wants, announcements and perform other actions such as printing out statements and offerings and wants lists. The interface also gives them access to a range of forms that can be printed for those who prefer to deal with paper.

An Example of a Trade

Requirement: Your car needs an oil change.

Step 1: You either look through the Offerings List or do a search to see if anyone is offering oil changes or car maintenance. Someone is offering oil changes for T80 but you must bring your own oil and oil filter.

Step2: In the Offerings List you click on the person's name to obtain contact details. You phone the person (the 'seller') and agree on a time and place for the oil change.

Step 3: The oil change takes place and then you (the 'buyer') fill in a Trading Slip (obtainable from the site), giving the date, your name, your account number, the amount (T80) and your signature. You fill in the same details on the counterfoil and get the seller to sign it. The counterfoil is then separated from the slip and you hand the main part to the seller, keeping the counterfoil for yourself. For the seller your Trading Slip represents your 'payment' and your acknowledgement of the service or goods delivered; for you the counterfoil is your record of 'payment'.

Step 4: You leave, satisfied that your car has fresh oil. The seller then goes to a computer and enters the details of the trade into the transaction form of his or her CES 'bank account'. This becomes a credit for the seller and a debit for you. You are now obliged to provide goods and services to the community worth T80. You 'pay' for your oil change by doing or selling something to someone else.

Questions and Answers

The following are some of the most frequently asked questions about the Community Exchange System (CES). If you do not find the answers to your questions here, write to

Q. What does joining the CES mean for me?

The CES is not a club or organisation but a new money system. Therefore you do not 'join' and become a 'member' of an club. You register to use the CES as a new way of trading, without using your national currency. You will feel that you are part of a community but this is because you will experience a different spirit among the traders of the CES. The CES is

characterised by openness, friendliness, honesty and trust, which is quite different to what your are likely to experience in the 'old' money system.

Q. Does it cost anything to join the CES?

There are many CES exchanges. Some charge an annual subscription fee in the national currency, others have no charges in conventional money, or any joining or membership fees in the exchange's own currency. Where there are no subscription fees, administration costs are covered by a small transaction levy (in the CES currency) that is added to all transactions, but such levies only become effective when you begin trading. Administrations require an income for running and promoting the CES.

Q. How can I begin trading without any money in my account?

A. The CES does not require that you have anything in your account to begin trading. As 'money' in this system is just a book entry or 'point scoring', there is no need for a supply of it. All new accounts start with a zero balance. You begin either by going into debit (you buy something) or credit (you sell something). A starting debit means your account balance goes below zero but unlike with conventional money you do not have to pay interest on it and there is no stigma attached to it (unless it gets large and is never reduced). Your debit simply means that you owe the community goods and services to the value of the debit.

Q. What is to stop me just entering payments into my account so that I get lots of credits?

A. You don't need credits to trade so there is no point in this. In any case, your credits are someone else's debits, and they will question your false trades with them. Your balance, which is open for everyone to see, will also reveal what you are doing. There is no need to cheat in the CES because you can simply go into debit and 'pay back' what you have received by delivering goods and services to others at a later time.

Q. What if someone exploits the system and then leaves the community without giving anything in return?

A. This can happen but equally someone who has given more than they have taken can also leave the community. If someone exploits the system it is the community that bears the burden, not any particular member.

Q. What if someone doesn't pay me for work I have done for them?

A. That is impossible. You - the seller - are responsible for entering or getting entered the transaction information and you will be immediately credited for it. In the CES the buyer is the passive party.

Q. Is this just a tax dodge?

Definitely not! Our motives are noble. We want to create a more equal and just society where wealth is distributed according to contribution, not according to your ability to 'make money'. In other countries where these systems have become big, the state has either ignored the tax angle because it saves the state money on welfare payments, or there is an agreement to provide services to the state. Our approach is that when we become big, the state should become a member of the CES and participate in the normal way. In this way the state could credit itself through the services it provides to all members and debit itself by purchasing the services of CES members.

Q. What if someone takes more from the system than they give back?

Before agreeing to trade with someone you should check their balance. If you see they have made a lot of purchases and are running a large debit, then refuse to trade until their standing has improved.

Q. What if my service is popular but I can't find anything I want? What is the use of a large credit balance if I can't spend it?

A. Don't trade unless you feel there is something you can get in exchange. As more and more people join the community the more likely it becomes that someone will have something you want. Encourage others to join.

Q. What is the currency called and what is it worth?

A. Each exchange has its own name for its currency. A common name used in the CES is 'Talents'. One Talent (or other name) is equal to one unit of the national currency (Dollar, Rand, Pound). This is purely to give it reference. CES currencies are not linked to the national currencies so could deviate over time. CES currencies are also not subject to inflation. Some CES exchanges base their accouting unit on time, e.g. 60 units per hour of service.

Q. How are goods and services valued?

A. Traders value their own goods and services, using the 1:1 relationship between their exchange's currency and the national currency. The 'law' of supply and demand applies, but within the context of a closed group. This frequently differs from the situation 'outside'.

Q. Is there just one CES exchange?

A. No, there are many established CES exchanges in different parts of the world, with new ones being introduced all the time. If you would like to start one in your area go to the registration page and fill in the form.

Q. Is it possible to trade between the different CES exchanges?

Yes! All the CES exchanges are linked and inter-exchange trading is possible. The CES currencies are as versatile as the national currencies. This means you can trade with any participant nationally or internationally, and your offerings are internationally accessible. Currency earned in one place can be spent in another.

How Do I ... ?

This 'HOWTO' document provides you with quick answers to many of the basic questions that may arise when using your CES account.

For more information consult the User Guide available from your personal home page or the Help button on each page.

Most of the actions here assume that you have logged into your account. There is often more than one way to perform the same action. We have described the most obvious ways here.

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Announcements

How do I add an announcement?

Click on the [Announce] button at the top. The Announcements list will appear. Click on the [Add Announcement] button and the 'Add New Announcement' form will appear.

If a date is relevant then select a date, otherwise leave it blank. The 'Remove after' date enusures that the announcement stops displaying after a certain date, when your announcement is no longer relevant, otherwise it will display for 30 days.

Enter the required details and click on the [Insert Record] button to save it.

How do I remove an announcement when it is no longer relevant?

The announcement will automatically stop displaying after the 'Remove after' date you selected, or, if you did not select a date it will continue displaying for 30 days.

If you want to remove the announcement immediately, click on the [Announce] button to call up the Announcements list, and then click on 'Edit/Delete Item' in the 'Posted by' column on the right. This will bring up the 'Edit/Delete Announcement' form where you can click on the [Delete] item to delete it.

How do I edit (change) an announcement

Click on the [Announce] button at the top. The Announcements list will appear. Find your announcement and click on 'Edit/Delete Item' in the 'Posted by' column on the right. This will bring up the 'Edit/Delete Announcement' form where you can modify your announcement. When finished click the [Update Record] button.

Help

How can I find out how to use this site?

You can get help for any page that you are on by clicking on the [Help] button at the top. This provides contextual help.

The same information is found in the User Guide. The User Guide also provides more general information about the CES.

My Account

My contact details have changed. How can I change them on the site?

Click on the [My Record] button at the top. That will bring up the 'Edit My Account Details' form, which is your personal record on the system. Here you can change your address, phone numbers and email address, amongst other things.

Change any details that you want and then click the [Update Record] button to save them.

How do I stop emails from the administration?

You can determine which emails you receive and which you don't.

To select which emails you do and don't receive, click on the [My Record] button at the top. That will bring up the 'Edit My Account Details' form, which is your personal record on the system. In the bottom line of the top panel you will see: 'Stop Lists, Stop Newsletter, Stop Updates, Stop Statements'. Check any items you don't want to receive and then click the

[Update Record] button to save your choices.

I'm going away for a year and so don't want to participate, but I don't want to close my account. How can I stop others contacting me?

You can hide your account, which in effect removes you from the system as far as others are concerned. This leaves your account intact and so you can un-hide it when you want to become active again. Hiding your account also stops all emails from the administration.

To hide your account click on the [My Record] button at the top. That will bring up the 'Edit My Account Details' form, which is your personal record on the system. In the bottom line of the top panel you will see 'Hide account'. Check the checkbox for this item and then click the [Update Record] button to save your change.

I've had enough of this. How can I get off the system permanently?

Contact the administrator and ask for your account to be closed. You cannot close your account yourself, but you can hide it which in effect closes your account as far as others are concerned and stops all emails.

Offerings

How do I add a new offering?

Click on the [Offerings] button at the top. Then click on the [Add New] button at the top of the Offerings page. That will bring up the 'Add New Offering' page where you can enter the details of your offering. Click the [Add Offering] button to save your new offering.

How do I add an offering to another exchange?

Follow the same steps as in the question above, except that before entering the details select the remote exchange from the drop-down list of exchanges.

Can I advertise an offering in all (or many) exchanges at once?

No, that is like spamming! We prefer to keep the adding of offerings a tedious process so that you don't spam all exchanges with your adverts all the time. Many users get annoyed seeing the same offerings over and over.

How do I edit (change) one of my offerings?

Click on the [Offerings] button at the top. Then click on the [Update] button at the top of the Offerings page. This will bring up the 'My Local Offerings' page, which displays your local offerings. If the offering you want to change is on a remote exchange, click on the 'My Remote Offerings' link at the top of this page.

To edit a particular offering click on the 'Edit offer' link under the 'Actions' subheading for that offering. This will bring up the 'Edit/Delete Offering' page where you can edit the offering. After making your changes press the [Update Record] button.

How do I delete an offering

Click on the [Offerings] button at the top. Then click on the [Update] button at the top of the Offerings page. This will bring up the 'My Local Offerings' page, which displays your local offerings. If the offering you want to delete is on a remote exchange, click on the 'My Remote Offerings' link at the top of this page.

To delete a particular offering click on the 'Delete offer' link under the 'Actions' subheading for that offering. That will delete the offering immediately. You can also delete an offering from the 'Edit/Delete Offering' page (see previous item).

How do I update an offering

Click on the [Offerings] button at the top. Then click on the [Update] button at the top of the Offerings page. This will bring up the 'My Local Offerings' page, which displays your local offerings. If the offering you want to update is on a remote exchange, click on the 'My Remote Offerings' link at the top of this page.

To update a particular offering click on the 'Update offer (to today's date)' link under the 'Actions' subheading for that offering. That will update the offering giving it today's timestamp and place it at the top of the lists where it appears. You can also update an offering from the 'Edit/Delete Offering' page (see previous items).

How do I hide an offering

Click on the [Offerings] button at the top. Then click on the [Update] button at the top of the Offerings page. This will bring up the 'My Local Offerings' page, which displays your local offerings. If the offering you want to hide is on a remote exchange, click on the 'My Remote Offerings' link at the top of this page.

To hide a particular offering click on the 'Hide offer' link under the 'Actions' subheading for that offering. That will hide the offering and the Status will show that the offering is hidden. To un-hide it simply click on the link again. You can also hide an offering from the 'Edit/Delete Offering' page (see previous items).

Recommendations

How do I add a recommendation?

In the centre of the home page of your account you will see 'Recommendations' under the 'Buyer Actions' sub-heading. Click on that and it will take you to the Recommendations List. Click on the [Give Recommenation] button. This will take you to the 'Give a Recommendation' form where you can enter your recommendation for the seller you would like to praise. Select the user from the drop-down list, enter a brief title and then enter your recommendation. Click the [Submit] button to save it.

How do I edit (change) or delete a recommendation?

Click on the [My Record] button at the top. This will bring up the 'Edit My Account Details' page. In the bottom panel you will see 'My recommendations'. Click on the [View/Edit] button. This will bring up the 'Edit/Delete Recommendation' form where you can edit any details. Click the [Update Record] button to save changes. If you click the [Delete] button the item will be deleted.

Remote Trading

I am travelling to another country (or other area where there is a CES exchange). How do I spend my credits there?

In the CES we do not 'spend' credits! If you have bought something from a seller in a remote exchange (e.g. accommodation) it is the seller who debits your account. All you have to do is give your account number and point out to the seller which exchange you are from. The amount you are charged is in their local currency. If there is a conversion rate differential the system will make the conversion and your account will be debited the correct amount in your own currency.

I did some work for someone in another country (or other exchange). How do I get paid for that?

There is no 'paying' in the CES, just the recording of transactions. As you were the seller you credit yourself as described under 'Transactions' below, except that when the

transaction involves a user in another exchange you have to select the remote exchange first, before selecting the buyer. After you have selected the remote exchange the list of names for that exchange will be loaded. Select the buyer's name and follow the same steps in the "How do I record the trade?" question under 'Transactions' below.

Someone in another country did some work for me. How do I pay them?

There is no 'paying' in the CES, just the recording of transactions. As the buyer you are the passive party. In other words you have to do nothing apart from giving the seller your account number and naming which exchange you are in. It is up to the seller to enter the transaction, which will debit your account and credit their's.

Security

How do I change my password?

Click on the [My Record] button at the top. This will take you to the 'Edit My Account Details' page, which is your personal record. Your password is in the top line of the form. Simply delete the dots that represent your password and type in your new password. Click the [Update Record] button to save your new password.

I've forgotten my password. How can I retrieve it?

At the top of the CES home page you will see a "Forgotten your password?" link. Click on that and you will be taken to a new page where you can enter your account number. Press the [Submit] button and your password will be emailed to the email account on record.

If your email address has changed you will not receive the password. Either look in your old account or write to the administrator or the generic email address info@community-exchange.org giving your new and old email addresses.

I've forgotten both my account number and password

In this case you will need to contact the administrator, or write to the generic address info@community-exchange.org

Transactions

How do I pay for something I have bought?

You don't do anything! In the CES it is the seller who enters the trading record. You will be debited by the seller.

I sold something. How do I record the trade?

If you only know the buyer's name and not their account number click on 'Enter Single Transaction (list)' at the top of the middle column on your personal home page. Select the buyer's name from the drop-down list, enter a description for the trade and the amount. Press the [Submit] button to proceed.

If you know the buyer's account number use the second option 'Enter Single Transaction (quick)'. Enter the buyer's account number, a description and the amount. Press the [Submit] button to proceed.

The 'Confirm Transaction' page will appear. Check the details carefully. If there is an error click the [Cancel] button and correct the error; if everything looks correct press the [Confirm] button. This will record the transaction, crediting your account and debiting the buyer's.

I did some work for someone in another country (or other exchange). How do I get paid for that?

There is no 'paying' in the CES, just the recording of transactions. As you were the seller you credit yourself as above, except that this time you have to select the remote exchange first, before selecting the buyer. After you have selected the remote exchange the list of names for that exchange will be loaded. Select the buyer's name and follow the same steps as in the previous question above.

Someone in another country did some work for me. How do I pay them?

There is no 'paying' in the CES, just the recording of transactions. As the buyer you are the passive party. In other words you have to do nothing apart from giving the seller your account number and naming which exchange you are in. It is up to the seller to enter the transaction, which will debit your account and credit their's.

I'm the buyer. I thought I had to pay the seller but debited her instead. How do I reverse the trade?

In the CES all trades are entered by the seller or by a third party on behalf of the seller (e.g. the Administrator). You cannot reverse the trade, only delete it.

Log into your account and on your personal home page click on 'My Statement of Account'. That will list your latest trades. Click on the Description of the trade you want to delete. That will bring up the 'Edit/Delete Transaction' form. Click the [Delete] button and that will remove the trade.

How do I enter a lot of trades in one go?

Select the 'Enter Multiple Transactions' seller action from the central column of your personal home page. Select the number of sales you woud like to enter, if more than 5, and then enter the account numbers, descriptions and amonts for all the trades, and finally press the [Submit] button.

I debited the wrong buyer. How do I correct that?

Click on 'My Statement of Account' in the middle of your personal home page. That will display your most recent trades. Click on the Description of the trade with the error. That will bring up the 'Edit/Delete Transaction' form. Click the [Delete] button to delete the trade. After that re-enter the trade with the correct buyer.

I entered the wrong amount for a trade. How do I correct it?

Click on 'My Statement of Account' in the middle of your personal home page. That will display your most recent trades. Click on the Description of the trade with the error. That will bring up the 'Edit/Delete Transaction' form. Correct the amount and click on the [Update Record] button.

I entered a wrong description for a trade. How do I correct that?

Click on 'My Statement of Account' in the middle of your personal home page. That will display your most recent trades. Click on the Description of the trade with the error. That will bring up the 'Edit/Delete Transaction' form. Correct the description and click on the [Update Record] button.

I have to cancel a trade. How do I 'refund' the buyer?

You need to delete the transaction. That will eliminate the buyer's debit and your credit.

Click on 'My Statement of Account' in the middle of your personal home page. That will display your most recent trades. Click on the Description of the trade that you would like to cancel. That will bring up the 'Edit/Delete Transaction' form. Click the [Delete] button to delete the transaction.

Users

How do I find someone's account number? Most information about users can be found on the Users Page. Click on the [Users] button at the top. If you know that the user is in your exchange, type the name in the 'Local search' textbox; if you don't know which exchange the user is in, type it in the 'Global search' textbox. In either case click the [Find] button. If a name matching your search text is found it will be shown. If nothing is returned then try typing just the surname or just the first name. Even typing part of the name, if you are not sure of the spelling, can work. **I have an account number. How do I find the name of the account holder?** On the Users Page (see above), enter the numeric part of the account number in the 'Account No' text box and press the [Find] button. This will find the local account holder of the number. If the account number is from another exchange, type the account number into the 'Global search' textbox and press the [Find] button. **I only have a user's phone number (or email address). How do I find them from that?** On the Users Page (see above), enter the phone number in the 'Search phone' textbox (or the email address in the 'Search email' textbox) and press the [Find] button. This will only find local account holders. If the user is from another exchange, first select the exchange from the 'Exchange' drop-down list. Then perform the same action.

Wants

How do I enter a Want?

Click on the [Wants] button at the top. That will display the Wants List. Then click on the [Add Want] button at the top of the list. That will bring up the 'Add New Want' page where you can enter the details of your Want. Click the [Insert Record] button to save your new Want.

How do I advertise a Want in another exchange?

Follow the same steps as in the question above, except that before entering the details select the remote exchange from the drop-down list of exchanges.

How do I edit (change) one of my Wants?

Click on the [Wants] button at the top. That will display the Wants List. Find the Want you want to change and then click on 'Edit/Delete Want' in the 'Name' column on the right. This will bring up the 'Edit/Delete Want' form. Edit the details and then click on the [Update Record] button to save the changes.

How do I delete a Want?

Click on the [Wants] button at the top. That will display the Wants List. Find the Want you want to delete and then click on 'Edit/Delete Want' in the 'Name' column on the right. This will bring up the 'Edit/Delete Want' form. Click on the [Delete] button to delete the Want.

Operating Instructions

The Login Page

The login page is available at **www.community.exchange.org**. There are a number of other addresses that may be used and many users log in through the web pages of their own exchange.

This login page also contains general information about the CES, an online registration form to join the CES, a demonstration site and links to other web sites with information

about complementary currency systems.

You need to enter your personal account number and password in order to access your personal account.

After the 'Account No' entry there is a legend 'Remember me?'. If you tick the checkbox to its right, then the page will remember your account number. This is a great feature if you regularly forget your account number. There is no danger in using this feature as the system does NOT remember your password so no one else can access your account.

If you have **forgotten your password**, click on "Forgotten your password?". You will be taken to a page where you will be able to enter and submit your account number. Your password will be e-mailed to you using the address on file. If you have forgotten both your account number and password, you will have to e-mail your administrator or contact your local area co-ordinator.

Once your account number and password have been entered correctly, you will be taken to your personal Home page.

Home Page

From the home page you can reach all the functions and facilities available to account holders. To get back to this page click on the [Home] button or the logo at the top left.

The Search box at the top permits you to search for the offerings of participants in your group. Type in what you are looking for and press the [Go] button. This will show you all the offerings matching your query. You may also type in a participant's account number, first name or surname or both.

Horizontal Menu

Description

The horizontal menu at the top gives you access to the 'marketplace' facilities of the the CES web site. This menu remains constant throughout the site, irrespective of which page you are on.

Usage

The **[Home]** button always takes you back to the home page of your account. You may also click on the logo at the top right to get back to your home page.

The **[Members]** button takes you to the Members page where you can view lists of users of your and other exchanges according to various criteria. You can also search for users, both in your own exchange and globally.

The **[My Record]** button takes you to your personal profile, as recorded in the CES database. Should you wish to change any of your details go to this page. From this page you can perform a range of personal actions such as: view/add/edit your offerings; view/add/edit your wants; view/add/edit your recommendations; view/add/edit your accouncements; check your balance; view/print your statement of account; view your traders; view/manage your groups. No one else has access to your personal profile.

The **[Offerings]** button takes you to the Offerings page where user offerings are advertised. On this page you can find offerings by looking up category lists or doing searches. You can also view the offerings of remote exchanges.

The **[Wants]** button takes Wants page where users advertise their Wants. You can also see the wants of remote exchanges.

The **[Announce]** button takes you to the Announcements page where users advertise events and other items of interest to CES users.

The **[Stats]** button takes you the Statistics & Reports page where you can see statistics and reports about the trading activities of your and other exchanges; user statistics and lists of remote exchanges.

The **[Help]** button provides contextual help for each page. Click this when you do not understand something on a particular page.

Vertical Menu

The vertical menu in the centre of the page gives you access to your personal trading account.

Seller Actions:

1. Enter Single Transaction (list)
2. Enter Single Transaction (quick)
3. Enter Multiple Transactions
4. Paste Transaction Data
5. Send Invoice

Buyer Actions:

6. Recommendations
7. Send Online Trading Slip
8. Send Order Form

Querying:

9. My Account Balance
10. My Statement of Account

Miscellaneous:

11. Trading Documents

Log Out Button

Log out after you have finished a session by clicking the red [Log Out] button at the top right. This will prevent anyone accessing your account after you have finished. You will be logged out automatically after twenty minutes, so do not go away from your computer for longer than this during a session.

Horizontal Menu - Operating Instructions

Your Account

Description

This is the 'home page' of your trading account. From here you can reach all the features

and functions on this web site. To get back to this page click on the [Home] button or the logo at top left.

Usage

The **Search** box at the top allows you to search for members, offerings or wants. First select whether you want to search for a member, offering or want and then type in what you are looking for and press the **Go** button. This will list all the finds matching your query. When looking for a member, you may type in an account number, firstname, surname, full name or part of a name.

The horizontal menu at the top gives you access to the list of users, your personal record in that list, the list of user 'offerings', your own 'offerings' records, the ability to add/edit/delete your 'offerings', the list of user 'wants', your own 'wants' records, the ability to add/edit/delete your own 'wants', the ability to add/edit/delete announcements and statistical information about your exchange.

The vertical menu in the centre of the page gives you access to your personal trading account.

• **Seller Actions** is where you perform various actions as the seller. **Enter Transactions** is where you enter details of your sales, which translate into the credits in your account; **Send Online Invoice** allows you to email an invoice to your buyers.

• **Buyer Actions** is where you perform various actions as buyer. **1. Recommendations** is where you enter recommendations about your buyers; **2. Send Online Trading Slip** allows you to email a 'cheque' authorising the seller to debit you for your purchase; **3. Send Order Form** allows you to send a detailed order to a seller, together with an order number.

• **My Account Balance** shows you, on the current date, the total number of sales and purchases you have made, and gives you your overall balance.

• **My Statement of Account** gives details of all sales and purchases you have made, including your balance after each transaction.

• **Trading Documents** takes you to a page where you can send online Trading Slips or download them in various formats. Trading slips are used to provide hard copy of your trading transactions.

• Every page has contextual help. Click the **Help** button at the top right of any page to get help on that page.

Please log out after you have finished your session by pressing the red **Log Out** button. This will prevent anyone accessing your account after you have finished. You will be logged out automatically after twenty minutes, so do not leave your computer for longer than this during a session.

Users List

Description

This page allows you to go directly to users' detail pages or see lists of users according to selections made or the categories shown.

Usage

• **Exchange:** This allows you to view the user lists of other exchanges. Select an exchange from the drop-down list and the page will reload, replacing the list of users in

your exchange with those of the selected exchange. All buttons and selections will now apply to the selected exchange.

• **Sub-area:** Select a sub-area from the drop-down list to see a list of users for the sub-area selected.

• **User:** Select a user from the drop-down list to see the user's detail page. The drop-down list is sorted alphabetically by surname or company/organisation name. To jump quickly to a name, press the first letter of the surname/name and then repeatedly to go to the next name until the name you require appears.

• **Account No:** This allows you to type in the right four digits of an account number in order to go directly to the detail page of the user whose account number you have entered.

• **Local search:** This allows you to search for the detail page of a local user. Type in the user's full name, or first name alone, or surname alone, or organisation/company name, or account number, or part of a name, and then press the [Find] button. This will bring up a list of users matching your query, from where you can select the user you are interested in.

• **Global search:** This allows you to search for the detail page of any user, local or remote. Type in the user's full name, or first name alone, or surname alone, or organisation/company name, or account number, or part of a name, and then press the [Find] button. This will bring up a list of users matching your query, from where you can select the user you are interested in.

• **Search phone:** Enter a phone number and press the [Find] button. If this matches any phone numbers in the database it will produce a list of users who use the number (usually just one!).

• **Search email:** Enter an email address and press the [Find] button. If this matches any email addresses in the database it will produce a list of users who use the email address (usually just one!).

• **All active:** This button will show the list of all active users. This is the full list of accounts excluding those which are marked as inactive or hidden. Click on a name to show the detail page of the user.

• **Co-ordinators:** This lists all local area co-ordinators for the exchange in view. These are like local 'branches of the bank'. Local area co-ordinators provide services for those without computers or who are digitally challenged!

• **New today:** This shows all new accounts created on the current day.

• **New this week:** This shows all new accounts created during the past seven days.

• **New this month:** This shows all new accounts created in the current month.

• **New this year:** This shows all new accounts created in the current year.

• **Individuals:** This lists all accounts registered as 'individual'. The majority of accounts are of this type.

• **Shared:** This lists accounts that are shared by more than one person, usually living at the same address.

• **Companies:** This lists all accounts registered as companies. These might not be registered companies in terms of official legislation.

• **Organisations:** This lists all accounts registered as organisations. These might not be registered organisations in terms of official legislation.

• **Public:** Public accounts are 'open' accounts where everyone can see their full

statements of account. In this category are entities allied with the CES in some way, and are thus required to be transparent in their dealings with other users.

• **Virtual:** This lists all virtual users that represent the remote exchanges with which this exchange is linked. Virtual users are required for trading with remote exchanges. Click here for more information on remote trading.

• **Closed:** This lists all accounts that have been closed. A closed account is a completely disabled account that cannot be deleted because the former owner left a trading record.

• **Locked:** A locked account is a fully functioning account but the owner has been blocked from purchasing. An account is locked by the administrator for serious breaches of the Terms and Conditions of the exchange, usually for exceeding debit limits. An account holder whose account has been locked may continue selling, but if anyone attempts to enter a transaction debiting a locked account, the transaction will be stopped. The account holder has to pay for what was received using some other method, usually with national currency.

• **Account growth:** This displays a table of user growth of the exchange, showing monthly totals of new registrations. The columns show registrations for the seven account types: Administrator (ADM), companies (COM), shared (FAM), individual (IND), organisation (ORG), public (PUB), virtual (VIR).

• **Account statistics:** This displays the real-time user situation: the number of users in each account category and the overall totals of active vs inactive users.

• **Account statistics:** This shows when users last logged into their accounts. If a user has not logged into their account then they will not be listed here. The default view shows which users accessed their accounts in the past week (7 days). Other time periods and categories can be selected from the 'Last accessed' drop-down list.

Offerings

On this page you can find all the information you need about goods and services being offered by users of the Community Exchange System, both in your exchange group and in others around the world.

The page is divided horizontally into five functional areas:

1. The grey bar at the top allows you to select other exchanges so that you can see what they have to offer. First choose a **country** (this will reload the page) and then the **particular exchange** whose offerings you would like to see (this also reloads the page). When you have selected a particular exchange, all the other functions below will relate to that exchange. On the grey bar is also the **[Add Offer]** button that takes you to a form where you can add new offerings for yourself. On the right side is a **printer icon** that when clicked brings up a new page in a new window showing all current offerings in a printer-friendly format.
2. Below the grey bar is the **search** function. By clicking on one of the three radio buttons, you can select whether your search is confined to the selected exchange, the country in which it is located or to all CES exchanges. Type your search query into the yellow search box and press the [Go] button. If your search does not produce satisfactory results try typing just part of the word you are looking for (e.g. if you are looking for a baby sitter you could search for 'baby' as this will find 'baby sitter' babysitter, baby sitting, babysitting' etc.
3. The third function is the green box below the search. This gives various options for viewing the **latest offerings** of your exchange and all exchanges combined. There

is also an option to download a single document with all current offerings. This list gets updated periodically so may not always contain the latest information.

4. Below this are various options for calling up the Offerings List in various ways. Click the **[View] all offerings** button to see all current offerings; Click the **[View] expired offerings** button to see all offerings that have expired. The other options allow you to call up the Offerings List for a selected period, either in the normal screen format or in a printer-friendly format. Use these if you want to see or print out the latest list of offerings.

5. At the bottom is a list of **goods and services categories** being offered by account holders of the selected exchange. It constitutes the **Offerings List**.

   By default the offerings of your exchange are shown. If you would like to see the offerings of other CES exchanges, select an exchange from the drop-down list at the left of the grey bar.

   Select any of the **categories** to view the offerings in that category.

To **edit** or **delete** your own offerings, find them in the appropriate category lists. You will notice that your offering titles are green and clickable. Click on the title of the offering you wish to edit or delete and you will bring up the 'Edit/Delete Offering' form where you can modify or delete it. Alternatively click on the [My Record] button at the top and then click on the 'My offerings: [View/Edit]' button at the bottom. This will bring up your personal list of offerings, which you can edit/delete in the same way.

If you would like to suggest a new category please write to the Administrator at admin@ces.org.za

For more information on remote trading with other exchanges read the document on this link.

Add New Offering

Use this form to add your 'offerings' to the **Offerings List**.

• Give your offering a **Brief Title**. This should be short and concise. Offering titles are listed alphabetically so use a title that is meaningful and attracts the attention of others looking for the services or goods you are offering.

• Select a **Category** from the drop-down list that best fits what you are offering. You may have the same offering under two or more categories.

• Under **Details** give a description of your offering. There is no restriction on the length of your description but keep it brief and clear. Use numbers or bullets if your offering can be broken down into various categories.

Note: If you get a message about unacceptable code in your input it is probably because you are pasting text from your word processor. To avoid this, type directly into the box or copy and paste from a text editor. Code pasted from a word processor often contains hidden code.

• Give a **rate** or **price** for your offering. There are two fields for 'Rate': one for CES credits and the other for national currency, if you are quoting a component in this currency. Try NOT to include a component in the national currency even if you have spent such currency on materials. Remember, you get your national currency back by earning more credits, which you can spend on things that you normally spent your national currency on!

• Type some **keywords** for your offering, other than those already in the Title or Description, that users might search on. Separate words with spaces. You may type words that together do not exceed 255 characters. You can never be certain which keywords a

potential buyer will use to find your offering so try to include different words that are related to your offering. E.g. if your offering is "Child minding" then use the keywords such as 'childminding, babysitting, baby sitting, childminder, child minder, baby sitter, babysitter' etc.

• Select a time period from the **Display for** drop-down list that you would like your offering to display for. Your offering will automatically be removed from the list after the selected time period unless you select 'Indefinite'. Use this facility to automatically remove offerings that are only relevant for a short time period (e.g. goods).

• **Upload a photo** of your offering by clicking the [Browse] button and selecting the digital photograph you have taken of the offering. The photo must be saved on your hard drive. This will upload it and place it above the description of your offering in the offerings list. Images must be small; no more than 100 pixels in height. Anything greater simply will not show. Only .jpg, .gif and .png image formats are acceptable.

After you have added all details, click the [Add Offering] button. The offering is added to the Offerings List.

If you want to **edit** or **delete** your offerings click on the [My Record] button at the top. Then click on the [View/Edit] button for offerings under the 'Personal Actions' sub-heading below your personal record. This will display all your offerings. Click on the title of the offering in the 'Offering' column and this will take you to the 'Edit/Delete Offering' form where you can edit or delete the offering.

Advertise your offerings in such a way as to make yourself 'marketable'. Do not offer services that only have meaning in a corporate or business environment. For example, you are not likely to get many takers for 'Coastal Management Consultant' or 'Aeronautical Engineer' within the CES context, though people might contact you for your services professionally.

Advertise services and goods that people will really want and can afford within the context of the system. Some examples are: 'handyman'/'oddjob' services, painting, gardening, sewing, child-minding, dog-walking, massage, car maintenance, computer training, photography, music lessons etc. The list is endless but requires some imagination.

If you find that you are not getting any requests for your services then you know they are not wanted. Try something else. There must be something you can do that people want. Advertise a range of things you do and then cut back on some of them if you find you are getting too many requests.

The same applies to things you want to sell. Don't sell expensive equipment through the system as this will place 'purchasers' in heavy debit and make it difficult for them to reduce it. If you have expensive goods for sale ask for payment or part payment in conventional Rands.

Try to ensure that your listing in the Offerings List attracts attention. Use descriptive headings for you offerings and explain what you offer clearly and attractively. A sloppy presentation with spelling errors and poor descriptions will put off prospective customers. Watch how others do it and try to improve on theirs.

Most people will find your offerings by searching the list. Try to use words that you think people will search for. Spelling mistakes or the use of American spelling forms (e.g. 'laboring' vs 'labouring' or 'counseling' vs 'counselling' will reduce or eliminate finds on your offering.

Edit/Delete Offering

Description

This form allows you to modify any of the details of your offering record, or delete it from the Offerings List.

Usage

Edit the **Title**; select a new category from the **Category** drop-down list; edit the **Details**; edit your **Rate**; modify your **Keywords**; select a new **Display** period. When done press the [Update Record] button.

You may also upload a picture of your offering if you not have already done so. Browse for the picture on your computer and when the path to it appears in the **Upload photo** box, press the [Update Record] button to upload it.

If you would like to delete the current picture tick the **Delete** checkbox and press the [Update Record] button. To **replace** an existing picture with a new one, simply upload a new one. You do not need to delete the old one first, though you can't delete it after you have uploaded a new one.

Whenever the [Update Record] button is pressed, the offering is updated with the current date, which brings it to the top of the Offerings List. If you would like to NOT update the date, uncheck the **Update date** checkbox. This will retain the original date and not move the position of the offering in the Offerings List.

If you would like to hide the offering, tick the **Hide** checkbox and press the [Update Record] button. You might want to do this with an offering that you want to display at certain times but withdraw at other times. A hidden offering will not be seen on the Offerings List or be found through a search. However, hidden offerings still display on your personal list of offerings (accessible from your [My Record] page), where you can unhide them.

• **Delete** the offering by pressing the [Delete] button. This will permamently remove the record from the Offerings List.

My Local Offerings

Description

This is your personal list of local offerings. These are offerings that you are advertising in your local exchange. Remote users can see these offerings if they look at the offerings of your exchange but if you wish them to be aware of your offerings then it is better to advertise them in the remote exchanges.

Usage

Offerings are added to this list by clicking on the [Add New Offering] button on this page, or from a similar button on the offerings page or from your personal account details page (click the 'My local offerings: [Add New]' button on that page).

• The **Title** line is the title that you have given to this offering.

• If you have uploaded a **picture** of the offering, the picture will be displayed; if not you will not see this line.

• The **Category** line indicates in which category this offering is advertised. To view all offerings in the same category click on the category name.

• The **Description** line provides additional information about the offering.

• The **Rate** line shows how much you are asking for the offering. This may include a component in the national currency. Rates quoted in national currency only are not permitted, and will be removed by the administrator without notice.

• The **Updated** line shows when the offering was added to the list or last updated. By clicking 'Update offer (to today's date)' under the Actions heading below, this date will change to the current date. The 'Updated' date is important as all offerings lists sort with the most recent dates at the top. If you want your offerings to appear at the top of the lists they are in, update them frequently.

• The **Expires** line shows when the offering will expire and cease to display. You need to perform an update on the offering if you want it to remain showing in the Offerings List. If the offering has expired it will say so in red. This means that it no longer shows in any of the offering lists and will not be found by a search. You need to update it for it to be listed again (*see below*).

• The **Status** line shows whether the offering is visible or hidden. You might wish to hide an offering if you want to keep it but not have it displayed at the current time. Use the 'Hide/Unhide offer' function under the Actions heading to hide or unhide the offering.

• Under the **Actions** heading you may perform various actions on the offering. Click on **Edit offer** to edit or delete the offering. This takes you to the 'Edit/Delete Offering' form where you can modify any aspect of the offering. Click **Delete offer** to delete the offering directly; click **Hide offer** to render it not visible or **Unhide offer** to render it visible again; click **Update offer (to today's date)** to give the offering today's time stamp. Updating the offering will bring it to the top of the category list in which it is advertised and also place it in the Latest Offerings list.

Offerings List

This is the 'Offerings List' for the category you have chosen. It is a list of goods for sale and services offered by account holders of your or the selected exchange. Offerings are added to this list by submitting them through the **[Add Offering]** button on the Goods and Services Categories page (to get to it, click the **[Offerings]** button on this page).

The list is initially sorted by the date when the offering was added or updated. By clicking on the **Updated**, **Offering**, **Area** and **Name** column headings, the list will be sorted by those columns.

• The **Updated** column shows when the offering was added to the list or updated. Both the date and time are shown. To view the latest offerings, click on the **Updated** column heading and the list will be sorted by date with the latest at the top.

• The **Offering** column shows the titles and descriptions of the offerings in the selected category. The titles of your own offerings are green and clickable, and by clicking on them you will be taken to the **Edit/Delete Offering** form where you can **edit** details about them or **delete** them.

• The **Rate** column indicates how much participants are asking for their offerings. This may be in CES currency, national currency or a combination of both.

• The **Area** column shows the area/suburb/town where the advertiser lives or is located. It does not refer to the area where the item is available or restricted.

• The **Name** column gives the name of the advertiser offering the goods or service. To obtain the advertiser's contact details, click on the name. **Send Query** allows you to send an email to the advertiser if you have a query about the offering; **Send Order** allows you to fill in an order form if you would like to order the goods or service advertised.

To **edit** or **delete** your own offerings, click on the [Offerings] button at the top and then on the [Update] button on the 'Offerings' page. Tick the 'Update' checkboxes of the offerings you wish to update and then click the icon at the bottom of the column. To delete an offering, click on its title and you will be taken to the 'Edit/Delete Offering' form where you can delete it. Alternatively click on the [My Record] button at the top and then click on the 'My offerings: [View/Edit]' button at the bottom. This will bring up your personal list of offerings, which you can edit/delete in the same way.

To ensure that your offerings are always near the top of the offerings list it is good to update them frequently. Do this this through your personal record ([My Record] button).

Latest Offerings - All Groups

This is a list of the today's and yesterday's offerings added by users of all groups of the CES. Some will be from other exchanges in your country and some will be from foreign countries.

You may respond to any of these offerings, if it is practicable to do so, and purchase from remote sellers.

• The **Name** column gives the name of the account holder offering the goods or service. To obtain contact details, click on the name. **Send Query** allows you to send an email to the advertiser if you have a query about the offering; **Send Order** allows you to fill in an order form if you would like to order the goods or service advertised.

Goods and Services Search

This is the offerings search page. It allows you to search for offerings listed in the Offerings List opened by pressing the [Offerings] button above.

Type a search word or phrase in the **Search:** box and press the **Go** button. The search is not case sensitive so 'computer' is the same as 'Computer'. A phrase search searches for words in the exact order you typed them, not for all the words separately.

You may also search for all the offerings of a particular member by typing in the account number of that member. As firstnames and surnames are in separate fields in the database, you won't find anything by typing in a member's full name, but if you type the firstname or surname on its own you will find the member's offerings.

You do not need to search for complete words or phrases. A search word that is found anywhere in the 'Offering' or 'Details' columns of the Offerings List, or matches an entered keyword, will find records that contain it. For example, a search for 'edit' will find records containing 'editing', 'editor' 'editorial' etc.

Goods and Services Search - All Groups

Use this search facility to search for goods and services advertised in the Offerings Lists of all exchanges. The search box on the green band at the top searches your exchange only.

Type a search word or phrase in the **Search Groups:** box on the 'Goods and Services Categories' page and press the **Go** button. The search is not case sensitive so 'computer' is the same as 'Computer'. A phrase search searches for words in the exact order you typed them, not for all the words separately.

You may also search for all the offerings of a particular user by typing in the account number of that user. As firstnames and surnames are in separate fields in the database, you won't find anything by typing in a user's full name, but if you type the firstname or surname on its own you will find the user's offerings.

You do not need to search for complete words or phrases. A search word that is found anywhere in the 'Offering' or 'Details' columns of the Offerings List, or matches an entered keyword, will find records that contain it. For example, a search for 'edit' will find records containing 'editing', 'editor' 'editorial' etc.

Wants List

Description

This list displays the Wants of those who have added to this list through the **[Add Want]** button on this page. If you can supply or respond to any of the advertised Wants, please contact the advertiser. The advertiser's contact details can be obtainted by clicking on the name in the 'Name' column on the right.

The list is sorted according to the dates the Wants were added, with the latest at the top. Advertised Wants remain on the list for 30 days, whereafter they cease to appear.

To see the full contact details and obtain other information about the advertiser, click on the advertiser's **name** in the Name column on the right.

You can send a message to the advertiser by clicking on **Send Response** in the 'Name' column. This brings up the 'Compose Message' form with the advertiser's email address and the title of the Want in the Subject line. Enter your response to the Want in the 'Message' box and click the [Send] button.

If you would like to send a copy of the Want to someone whom you think might be able to respond to the advertisement, click on **Send to a Friend**. This brings up the Compose Message form with the Want in the body of the message. Simply enter the recipient's email address in the 'To' box and click the [Send] button.

• If you would like to **edit** or **delete** the details of one of your own Wants, click on **Edit/Delete Want** below your name in the 'Name' column. This will take you to the **Edit/Delete Want** form where you can modify any details or delete the Want. After making your changes, press the **[Update Record]** button.
Click the **[Delete Record]** button to delete it.

Add New Want

Description

Use this form to advertise your 'wants' on the Wants List. For example, if you want someone to come and paint that room, mow your lawn, fix your car, lend you a tent, house-sit while you are away, look after your pet, accompany you to the opera, sell you a bed, etc, advertise it here and see who responds. You can either pay in kind, national currency or CES currency.

Usage

If you are advertising the Want on your own exchange, ignore the **Add to Exchange** drop-down list at the top. If you wish to advertise your Want on another exchange select the remote exchange from the drop-down list and it will be advertised on the Wants List of the selected exchange.

Enter a **brief title** for the Want (e.g. 'Cellphone', 'Spanish teacher', 'Horse riding gear', Panel beater').

Want adverts normally display on the list for 30 days. If you wish your advertisement to remain longer, tick the **Keep after expiry** checkbox.

Enter the **details** of your Want in the edit box at the bottom. You may use the editor buttons to format the text. You can also cut and paste text into the box, including pictures.

When you are satisfied with your Want advertisement click the [Insert Record] button.

--

Please delete Want records before the expiry date if they have been satisfied.

If you want to **edit** or **delete** a Want click on the [Wants] button at the top. Your wants will display 'Edit/Delete Want' below your name in the Name column on the right. Click on it and you will be taken to the 'Edit/Delete Want' form where you can edit or delete the Want.

Edit/Delete Want

Description

This form allows you to modify any of the details of your Want record, or delete it from the Wants List.

Usage

- **Edit** the details of this want record. When done press the **[Update Record]** button.
- **Delete** the record by pressing the **[Delete Record]** button.

Want records normally cease displaying in the Wants List after 30 days of their being added. If you wish a record to remain longer, tick the checkbox to keep it after expiry.

Please delete your records manually if your wants have been satisfied.

Groups

Description

This is the 'Groups Home' page. It is the initial page that shows when the [Groups] button at the top is pressed and when 'Groups Home' is clicked on any of the other groups pages.

The left column lists recently added groups, with local groups at the top and global groups below.

The right hand column lists all the groups you own or have joined, again with local groups at the top and global groups below.

There is a drop-down list to select the category of groups that you would like to see, a search box for searching for groups and a [Create a New Group] button for creating a new group.

Usage

To view groups in a particular **category** select the category from the drop-down list. This will bring up a list of the groups in the selected category. You can also click on the category type next to the 'Category' heading of each group, which will list all groups in the same category.

To search for groups, enter your search text in the **Search for Groups** text box and press the search button. This will bring up a list of groups matching your search text, if any.

Click the [Create a New Group] button to bring up the form for **creating** a new group.

For **more information** about a particular group, click on the title of the group or on 'Go to group page' next to the 'Actions' heading of each group. This will bring up an information

page about the group.

To view the list of **members** of any group click on the member count opposite the 'Size' heading of the group.

You may **join** any group in the left hand column by clicking on 'Join group' next to the 'Action' heading of the group.

Join This Group

Description

This form allows you to join the selected group.

Usage

Description explains what the group is all about. Read about the group but if you require further information go back to the group's information page and contact the group owner.

Category indicates in which category the group is located. Click the category title to see other groups in the same category.

Scope indicates whether the group is local or global.

Access indicates whether the group is open, closed or invitation-only. Hidden and private groups are not shown.

Size indicates the current number of members of the group

Created date is the date when the group was created by the group owner.

Modified shows the date when details of the group were changed by the group owner.

Actions indicates the range of actions for the group.

Should you wish to join the group, click the [Join Group] button at the bottom and you will be made a member of the group.

Create a New Group

Description

This function allows you to create a new group. A group is any set of CES members, either from your exchange or from all exchanges, who share a common interest in co-operating in some way. This may be for trading, social, fun, community building or other purposes.

Usage

Group Name

Group Name is the name that you are going to call your group. It may be any name but should be descriptive of the kind of group that you plan to create. This is a short name that identifies your group and tells prospective new members what kind of a group it is.

Category

Select a group category from the drop-down list. If there is not a suitable category for the kind of group that you wish to create, send your suggestion for a new category to the CES Administration at admin@community-exchange.org.

Types of Access

Open Group

Anyone can join and invite others to join. Anyone can see the group's information, discussion forum and notice board but only members will receive posted items and be able to contribute to the discussion forum and notice board.

Closed Group

This can mean two things:

1. The group owner wishes to approve all applications to join.
2. This is a former Open Group but new members are not permitted to join because the group has decided not to take on any more members (e.g. a book club). The group might be opened again if members decide to take on new members.

Anyone can see the group's information, discussion forum and notice board but only members will receive posted items and be able to contribute to the discussion forum and notice board.

Invitation Group

Membership is by invitation only. Invitations are sent by the group owner.

Anyone can see information about the group but only members will receive posted items and be able to see the discussion board and photos.

Hidden Group

The group will not appear on the Groups List and will not be found through a search. Membership is by invitation only. Only members of the group will receive posted items, and be able to see and contribute to the discussion forum and notice board.

Private Group

This is any personal collection of CES account holders. The 'members' of the group will not know they are on your personal list and the group will not be visible to anyone else and will not be found through a search. You might want to create such a group to keep track of your personal traders, friends, colleagues, or any other set of account holders. Such a group will not have a discussion forum but will have a notice board where you can keep your personal notes. It cannot be linked to any account other than your own.

Group Settings

All members can upload photos

If this is ticked then all members of the group will be able to upload photos to the site and they will display from the group page. If it is not ticked then only the group owner will be able to upload photos.

All members can post mail

If this is ticked then all members of the group will be able to post items and they will go to all other members of the group. If it is not ticked then only the group owner will be able to post.

Enable discussion board

If this is ticked then the discussion board will display. If it is unticked after members have contributed to the discussion board, discussions will not be deleted and will display again when it is ticked. This is an on/off switch for the discussion board.

Show similar groups

If this is ticked then the group page will list other groups in the same category.

Global

By default groups are local in that only members of your exchange may join them and they are not displayed in the Groups Lists of other exchanges. If you want to create a group with a global (international) membership then tick the Global checkbox. The group will then display in the Group Lists of all exchanges (provided it is not a Secret Group).

Group Address

This is the address you wish to use for your group. It could be the group owner's address or any other address that you want members to use in order to contact the group owner or administrator(s). There might be no need for an address at all.

Telephone

This is the phone number that members of the group should use to contact the group owner.

Email

This is the email address that members of the group should use to contact the group owner.

Internet Messaging (IM)

You may list one or more internet messaging accounts here (e.g. Skype, ICQ, Google, Windows Messenger etc.). These should be the group owner's accounts, or those of anyone who is appointed as the contact person for the group.

Web

If your group has a web site then enter it here.

Upload Photo

Upload a logo or other photograph that is the group's symbol. This is not essential but a logo or symbol is useful for identifying the group.

Active

By default a new group is active, in that members can join, the discussion forum is alive and mail may be sent to members. If you want to shut down a group, temporarily or permanently, untick the 'Active [ ]' checkbox. This stops all functions of the group and hides it from view and searches. Ticking the same checkbox re-activates the group. Nothing is deleted by de-activating a group.

Group Page

Description

This is the information and activity page of the selected group. It contains a **Description** of the group and **Information** about it. If you are a member of the group it provides access to all the activities and information about the group and its members.

Usage

Depending on the group's settings, you may be able to view the group's **News**, **Discussion Forum** and **Notice Board**. Also, what you can see and do expands

when you become a member of the group.

If you are a member, this is where you can participate in all discussions, in the forums and by email.

If the discussion forum is activated you can **Start a new topic** if no one has yet made a contribution, or click on a topic to be taken to a list of all contributions to the topic.

Only the latest topics appear on this page. To see older topics click on **All topics** to be taken to a list of all topics for the group.

If the notice board is activated and you are a member of the group, you can **Add your comments** or read the contributios and respond to them.

If you are a group administrator you will be able to **manage** the group through a sophisticated management console. To reach the console, click on 'Manage group' which will appear under the 'Actions' heading at the bottom right.

Click on the **category** to see a list of other groups in the same category.

Click on the member count to see the list of **members** of this group.

If you have not joined the group the only actions you will be able to perform are to '**Invite a friend to join**' the group or **join** it yourself.

If you are a member of the group there will be multiple options under the **Actions** heading:

- **Leave group** will remove your name from the membership list. On clicking this option a confirmation box will appear informing you that all your contributions to the notice board and discussion forums will also be removed.
- **Email group** allows you to email all members of the group (this option could be switched off in the group settings)
- **Group email** brings up a list of emails sent to the group by members of the group. This is an archive of emails sent by members of the group to the group.
- **Stop all email from this group**. Click on this option if you would like to stop email from the group. If you have switched it off and want to start receiving emails again, the option will be **Allow email from this group**. Click that to start receiving emails again.
- **Events** lists all current events of the group.
- **Offerings** lists group members' offerings.
- **Wants** lists group members' wants.
- **Member balances** shows the current balances of all members of the group.
- **Trading statistics** provides statistics about the trading activities of members of the group.
- **Trader statistics** provides statistics about the traders of this group.

Administrators do not see these options because they are all available from the management console. Click on **Manage group** to access the management console.

Members Page

Description

This page lists all the members of the group selected.

Initially members are sorted by Status (owner and administrators at the top and members below, with the latter sorted by surname or company/organisation name).

Members can be shown in a variety of sort orders and it is possible to search for members.

Usage

If there are more than 10 members in the group the additional members will be displayed on subsequent pages, in which case you can click on the forward and backward buttons at the bottom right.

To **sort** the membership in different orders, select a sort order from the 'Sort by...' drop-down list.

- **Status** shows members with the owner and administrators at the top and members below (sorted by surname).
- **Joined - Latest** orders members by the date/time they joined, with the latest joiners at the top.
- **Joined - Earliest** shows the earliest joiners at the top.
- **Last Visit - Latest** shows when members last visited the group page, with those who visited the group page most recently at the top.
- **Last Visit - Earliest** shows those who visited the group page the longest time ago at the top.
- **Vists - Most** orders members by those who have visited the group page the most times at the top.
- **Visits - Least** orders members by those who have visited the group page the fewest times at the top.

Search for members by entering a name in the 'Seach for Member' text box and pressing the search button. Members matching the name entered, if any, will be listed in a new form.

Click on a member's name to see the **account details** of the member.

To send an **email** to a member click on 'Send message' next to the Actions heading for the member.

If you are the group owner or an administrator then two additional options will appear against the Action options for each member: **Make admin** changes the member's 'member' status to that of an administrator. If the member is already an administrator you will see **Make member**. This revokes the member's administrator status and return the member's status to 'member'; **Remove** removes the member from the group.

Group Categories

Description

This page lists groups in the category selected. Local groups are displayed at the top and global groups below.

Groups are initially displayed in the order in which they were created, with the latest at the top.

Usage

Other categories can be selected from the 'Select a category...' drop-down list. Apart from the different categories of groups, you can select **all groups**, **your groups**, **most popular groups** and **new groups**. You can also click on the category type next to the 'Category' heading of each group, which will list all groups in the same category.

To search for groups, enter your search text in the **Search for Groups** text box and press the search button. This will bring up a list of groups matching your search text, if any.

Click the [Create a New Group] button to bring up the form for **creating** a new group.

For **more information** about a particular group, click on the title of the group or on 'Go to group page' next to the 'Actions' heading of each group. This will bring up an information page about the group.

To view the list of **members** of any group click on the member count opposite the 'Size' heading of the group.

If you have already joined a group, you can go to its information and activity page by clicking on the heading of the group or on **Go to group page** next to the Actions heading

You may **join** any group in the left hand column by clicking on 'Join group' next to the 'Action' heading of the group.

Group Discussions

Description

This page displays discussion contributions under the topic title selected (and shown on the page). Contributions are displayed in date/time order, with the latest at the top.

Usage

If there are more than 10 contributions/responses the additional contributions will be displayed on subsequent pages, in which case you can click on the forward and backward buttons at the bottom right.

Click the **Respond** option at the top right or below each item to respond to the topic and have your contribution displayed here.

If you would like to email the writer of any particular item, click on **Email writer** below the item you would like to communicate about. The email only goes to the writer of the item.

Notice Board - Post a comment

Description

This form is for composing and submitting a comment to the notice board of the group indicated.

Usage

Simply enter your comments in the **Comment:** text box and press the [Post] button. You comments will immediately appear on the notice board.

Current Events

Description

This page lists all current events announced by the administrators of this group. Events stop displaying on this page after the end of the event.

Usage

This is essentially an information page. The only action for regular members is the ability to **email** the event organiser. Click on the email address (if any) to email the organiser.

If you are an administrator it is possible to view both current and past events. You are also able to edit events by clicking on the **Edit/Delete Event** option at the bottom of each event.

Compose Message

Description

This is a simple form for composing and sending emails to members of this group. Depending on where this function was called from, the **To:** line will either say 'All members of this group' if the email is being sent to all members, or the member's name and email address will be shown, or it will be a blank input box where the email address of the recipient should be entered.

Usage

If the **To:** line is blank enter the recipient's email address.

In certain instances the **Subject** line will already be filled in. If this is the case, you can either accept the subject or alter it in any way you like. If the subject line is blank then enter a subject for your email. If you do not enter a subject the name of the group will be used instead.

Enter the contents of the email in the **Message:** box. The text should be plain text, so do not paste formatted content from another program. There should be a blank line between paragraphs.

When finished, press the [Send] button. If the email is being sent to all members it will immediatly appear in the 'Group Email' list.

Group Email

Description

This list is a record of all emails sent by members of this group to all members of the group. It shows who sent the email, the date it was sent, the subject line and the contents of the email. All group members can respond to any email, either sending a reply to the sender only or to the whole group. Only when a reply is sent to the whole group is it recorded on this list.

Usage

Select **All emails**, **My emails** or **Not my emails** from the 'Select...' drop-down list to filter which emails you would like to see.

It is possible to sort the list by **Date**, **Sender** or **Subject** by selecting your choice from the 'Sort by...' drop-down list.

Search for emails by typing your search word or phrase in the 'Search emails' box and pressing the search button. This will list all emails that contain your search text.

Invite a Friend to Join This Group

Description

This form allows you to invite someone to join the selected group.

Usage

The top part of the form displays some information about the group.

If the user to whom you are going to send the invitation is in your exchange (and has email), select the user from the drop-down list and press the [Invite] button.

If you know the user's account number or the user is not in your group, enter the full account number in the 'A/C No.' text box and press the [Invite] button.

If you only know the user's email address then enter it in the 'Email' text box and press the [Invite] button.

Pressing the [Invite] button sends an email to the user with information about the group and a link taking the user to the Join Group form.

Manage Group

Description

This is the management console of this group. Only you, as the group owner and any members that you have designated as administrators, have access to it.

Usage

The console contains a range of tools for managing the group. These tools are available from 6 sub-pages that are accessed from a horizontal menu on the console. The headings of these sub-pages are listed below. Under each heading the functions for that sub-page are explained.

Trading

Group Trading Account

A group trading account is a trading account linked to the group. It is the group's private account so that it can trade with its members and any other CES users.

The group can be linked to an already existing account (e.g. the group owner's account) or to a new dedicated account that makes the group a trading entity.

If the group was not linked to an existing trading account or a new account was not opened for the group at the time of its creation, you can open a new trading account for the group or link it to an existing account at any time.

To create a new account, click on the 'Trading' menu at the top of the console. Tick the **Create** checkbox and click the [Create] button. Doing this will create a new trading account with the same name and details as the group. The account will be of the 'Organisation' type, meaning that the group owner will be listed as the contact person and the account will be listed under organisations on the Members page. The account login details will be automatically emailed to the group owner.

If you would like to link the group to an existing account, enter the account number and password of the account and click the [Link] button.

If the group is already linked to an account then you will see a number of trading options. Most of these are similar to the normal trading functions of the site:

1. Edit account
2. Balance
3. Statement of account
4. Debit single member
5. Credit single member

6. Debit multiple members
7. Credit multiple members
8. Debit all members
9. Credit all members

For more help on these, see the help pages on these functions.

Member Balances

This function shows the current balances of all group members.

Group Trading Statistics

1. Trader statistics
2. Trading statistics
3. Trading activity

For more help on these, see the help pages on these functions.

Members

Send Invitation to Join

If this is a local group, enter the four-digit account number of a user of your exchange (e.g. 1234); if this is a global group, enter the full account number of a user of any CES exchange (e.g. ABCD1234). Press the [Invite] button to email an **invitation** to the user. This gives information about the group and invites the user to join.

Alternatively, enter the email address of a CES user. If it is a local group this must be the email address of a registered user of your exchange; if it is a global group it must be a registered user of some CES exchange.

Add Single Member

If this is a local group, enter the four-digit account number of the user (e.g. 1234); if this is a global group, enter the full account number of the user (e.g. ABCD1234). Press the [Add] button and the user will be added to the membership list of the group. The member's details will be obtained from the CES database and the new member will be sent an email that they have been added as a member of the group.

Add Many Members

Enter full account numbers, one per line, like this:

ABCD1234
ABCD4321

If this is a local group, the four-letter exchange prefix must be the same for all members; if it is a global group the list can contain mixed prefixes (i.e. members can be from any exchange).

If the list is long it can be prepared offline with a text editor and then pasted into the box.

When all account numbers have been added to the input box, press the [Add] button. The member's details will be obtained from the CES database. New members will be sent an email informing them that they have been added as a member of the group.

Members: Number of members shows you the total count of members.

Members: Manage members takes you to the membership list where you can remove members, change their status (i.e. make them administrators or revoke their administrator status), obtain their contact details and send them an email. See the membership page for more information.

Members: Search for member allows you to search for a member. Enter the member's name or account number in the search box and press the [Find] button. You can also enter part of a name if you cannot remember the spelling or any other details.

Events

Event List has two options: *Current events* or *Past events*. Current events lists all pending events and allows you to edit the record; Past events is an archive of events that have already happened.

New Event contains all the data input fields to allow you to advertise a new event and email members about it.

Event Name is the name of the event (e.g. Market Day).

Start Date is the date and time of the start of the event. A start time must be entered, even if the event does not have a specific start time.

End Date is the date and time of the end of the event. If no date is entered then the start date will be used. It will be assumed that the event starts and finishes on the same day.

Description should contain information about the event.

Location is where the event will be taking place.

Organiser is the name of the person organising the event or the person whom you would like members to contact about the event. The organiser is not necessarily the owner of the group.

Organiser's Tel is the telephone number of the organiser or the person whom you would like members to phone about the event.

Organiser's Email is the email address of the organiser or the person whom you would like members to email about the event.

Email all group members about this event: tick this checkbox if you would like all group members to be sent an email about the event. This will get sent when the [Submit] button is clicked.

Mail & News

Group Email: List group email lists all emails that have been sent to all members of the group, both by the administrator and by the members (if 'All members can post mail' is switched on in the settings for the group). It is another form of discussion forum but all discussion takes place via email rather than directly on the site.

Mail all Members is a form for sending emails to all members of this group. Enter a **subject**, the **message text** and press the [Send] button. The email will be sent to all members of the group who have email and will immediately appear in the group email list (*see above*).

Update News is a facility for posting and updating the news item that appears on the group home page. The text box is initially blank but after a news item has been posted it appears in the text box. The date of the last updating is shown. To delete the news item simply remove it from the text box and press the [Update] button.

Offerings & Wants

If the group is not linked to an account then all that appears on this page is **Members' offerings** and **Members' wants**. These lists are similar to the main

Offerings and Wants lists except that they only show the offerings and wants of the members of this group.

If the group is linked to an account additional functions appear: **Group account's offerings** shows the offerings of the group account and **Add offerings for group account** allows you to add offerings for the group account. **Group account's wants** shows the wants of the group account and **Add wants for group account** allows you to add wants for the group account.

Settings

This is where you can alter the basic settings of the group, and even delete the group should you wish to close it down.

After changing any parameter just press the [Update] button at the bottom to effect it.

Group Name allows you to alter the name of the group.

Description describes what the group is all about. Should anything about the group's purpose or activities change you can amend it here.

Category places your group alongside similar groups. Should you wish to change the group category select a new one from the drop-down list.

Scope informs you whether your group is local or global. It is not possible to change a local group to global or vice versa because local groups are part of your local exchange while global groups belong to a separate global exchange (Global Groups Exchange - GLOG). If you want to change the scope of your group you will have to create a new one.

There are five modes of **access**. It is possible to change the access mode of your group simply by clicking the required access mode radio button:

- **Open**. Anyone can join and invite others to join. Anyone can see the group's information, discussion board and photos but only members will receive posted items and be able to contribute to the discussion board
- **Closed**. Anyone can apply to join and invite others to join but applications have to be approved by the group owner. Anyone can see the group's information, discussion board and photos but only members will receive posted items and be able to contribute to the discussion board
- **Invitation**. Only those invited to join by the group owner may join. Anyone can see the group's information, discussion board and photos but only members will receive posted items and be able to contribute to the discussion board
- **Hidden**. Only those invited to join by the group owner may join. Only members can see the group's information, discussion board and photos and only members will receive posted items and be able to contribute to the discussion board. The group will not be visible to others or found through a search
- **Private**. Only the group owner can add names to the group. Those added will not be aware that their names are in your personal group. The group will not be visible to others or found through a search

Settings allows you to enable or disable various functions below. By ticking the relevent checkboxes the functions can be turned on and off. Turning off does not destroy any data; it just makes the function unavailable.

If the access type of the group is private then these settings will not show as they are all disabled by default and are not meaningful for private groups.

- **All members can post mail**. If this is checked then all members are able to email the whole group; if it is not checked then only the group owner and administrators can email the whole group
- **Enable discussion forum**. If this is checked then the discussion forum shows on the group home page; if unchecked then the discussion forum is disabled.
- **Enable notice board**. If this is checked then the notice board shows on the group home page; if unchecked then the notice board is disabled

Group Address and **Postcode/Zip** is the address you would like to use for this group.

Tel is the telephone number you would like to use for the contact person of the group. This is usually the group owner but could be someone else.

Email this is the email address that you would like users to use if they want to contact the group owner or obtain feedback about the group.

IM is the internet messaging address. This could be a Skype address or any other internet messaging service.

Web is the address of the web site of the group, if any.

The **Active** checkbox allows you to hide/de-activate the group. If the checkbox is unticked then the group will not show on the group list and effectively it will be inaccessible to all. Use this feature if you want to stop the group running for a while but be able to re-activate it at a later time.

Upload Picture allows you to upload a picture for your group. This is the group's symbol, logo or other picture that identifies it. To upload a new picture click on the [Browse] button. Find the picture on your computer and when it appears in the 'Upload picture' text line, click on the [Update] button to upload the picture.

If your group already has a picture you can click on the [View] button to look at it. To delete the current picture click on the [Delete] button. It is not necessary to delete an old picture before uploading a new one. The new picture will be used in place of the old.

Delete Group

If you would like to **delete the group** entirely, click the [Delete Group] button. This will remove the group from the database, as well as all data associated with it. This includes the membership list, all discussion forum contributions, notice board contributions, group emails and group events. If there is a linked trading account, this will also be deleted if it is not the owner's personal account and there is no trading recorded for the account.

Announcements

Description

This list displays announcements added to this list through the **[Add Announcement]** button on this page. These are announcements about events or anything of interest to the traders of this CES exchange.

Please do not use this list for advertising your offerings; use the Offerings List instead. You may however advertise courses and events that would be of interest to other traders.

The list is sorted according to the order in which the announcements were added, with the

latest at the top. The actual dates in the Date column may not appear to be in date order as they could refer to the dates of events or, if no date was given, to the date on which the accouncement was added.

Announcements remain on this list until the expiry date specified by the advertiser or, if no date was given, for 30 days, whereafter they will cease to appear.

Usage

• To view the announcements of other exchanges, click on the **Other exchanges** drop-down list. Select an exchange and the list will display the announcements of that exchange, if any.

• To add a new announcement to this list click on the **[Add Announcement]** button. This will take you to a form where you can enter the details of the announcment. Please do not use the announcements list for advertising your personal offerings.

• To call up a printer friendly version of this list, click on the **Printer friendly version** icon at the top right of the list.

• If you would like to **edit** the details of an announcement that you have already placed, click on 'Edit/Delete Item' below your name in the 'Posted by' column. This will take you to the **Edit/Delete Announcement** form where you can modify any details. After making your changes, press the [Update Record] button.

• If you want to **delete** the item, click on the [Delete] button in the 'Edit/Delete Announcement' form (*see above*).

Add New Announcement

Description

Use this form to add an announcement to the Announcements List. For example, if you want to advertise an event or draw others' attention to a book or article, announce it here. You can announce anything here provided it is not to draw additional attention to your personal offerings or wants. You may use this list if you are advertising a workshop, exhibition, course etc. that will happen or start on a particular date.

Usage

If you would like to post your announcement to another exchange, select the exchange from the **Add to group** drop-down list, otherwise leave this showing your own exchange.

The **Title** field is for giving a brief title to your announcement (e.g. "Market Day"); the **Details** field is for giving details about the announcement (e.g. date, time, place, directions, etc.).

The **Date** field is for giving a date to announcements that are date specific (e.g. an event or expiry date). The **Remove after** field allows you to specify when the announcement should be removed from the list.

You are not required to provide any dates associated with your announcement (e.g. it might be an announcement about a book). If no date is provided then the system will automatically insert the current date. If no 'Remove after' date is provided the system will automatically insert a date 30 days after the current date, meaning that the announcement will disappear after 30 days unless you specify a date when it should be removed.

Please delete announcements before the expiry date if they no longer have relevance (e.g. an event is cancelled).

If you want to **edit** or **delete** an announcement click on the [Announce] button on the menu

bar at the top. Look for your announcement in the 'Title' column on the left. Your announcement titles will be green and clickable. Click on the title and it will take you to the 'Edit/Delete Announcement' form where you can edit or delete it.

Edit/Delete Announcement

Description

This form allows you to modify any of the details of your announcement record, or delete it from the Announcements List.

Usage

- Edit the details of this announcement record. When done press the [Update Record] button.
- Delete the record by pressing the [Delete] button.

The 'Date' field refers to the date on which the announcement has relevance (e.g. the date of an event), or else it is just the date on which the announcement was placed.

Announcements will cease displaying on the day after the date displayed in the 'Remove after' field. If you wish a record to display for longer, simply change the 'Remove after' date.

Statistics and Reports

Description

This page provides statistics about your and other exchanges in different ways. Some of these are to do with trading and some to do with users. The 'Local Functions' section deals with your exchange while the 'Global Functions' below deal with the CES network.

Local Functions

Trading Statistics: View the real-time trading position of users of this exchange
Trader Statistics: View the real-time statistics about the traders of this exchange
Trading Activity: View trading statistics for a selected time period
Member Balances: View the current balances of all traders of this exchange
Member Balances: Print list showing current balances of all registered users of this exchange
Account Growth: View the growth in the number of registered accounts in this exchange
Account Statistics: View the real-time account statistics of this exchange
Access Details: View when users last accessed their accounts.
Trading Limits: View the list of traders who are currently over their debit or credit limits
Local Area Co-ordinators: View the current list of local area co-ordinators. Contact a co-ordinator if you require assistance of any kind or you do not have regular access to a computer.

Global Functions

Exchanges: View the list of all active CES exchanges
Conversion Rates: View currency conversion rates between different exchanges
Balance of Trade: View "balance of trade" of all exchanges
Balance of Trade: View "balance of trade" of all exchanges in your country only

Help

The Help button at the top right provides contextual help for each page of the CES web site. If you cannot understand something about a particular page or process, click the Help button to find help. If you still cannot find a satisfactory explanation for what you want to do, contact your Administrator or your Local Area Co-ordinator.

Vertical Menu - Operating Instructions

Seller Actions:

Enter Single Transaction (List)

Description

This is where you, as the seller, enter the transaction details of the sales you have made. You can only enter information relating to your trading account. If you are entering information on behalf of another user then you must first log in as that user (after obtaining their account details).

If you have a lot of transactions to enter use the **Multiple Transactions Form** or **Paste Transaction Data** form instead of this one. You can get to them from the home page of your account.

Usage

The information that you enter here should be that obtained from a Trading Sheet or Trading Slips (cheques) signed by the buyers of your goods and services. If you have no signature or written confirmation of the amount(s) entered here, you have no comeback if the buyer challenges your entry.

• If the buyer is from your own exchange then you can ignore the **Exchange** drop-down list; if they buyer is from a remote exchange first select the exchange from the drop-down list.

• Select the buyer's name from the **Buyer** drop-down list **OR** enter the buyer's 4-digit account number. Names in the drop-down list are sorted alphabetically by surname or organisation/company name. To jump directly to a name press the first letter of the (sur)name, repeatedly if necessary. If by mistake you select a name from the drop-down list and you type in an account number, the typed account number will be the one chosen. If you are trading with a buyer in a remote exchange, you must first select the user's exchange from the Exchange drop-down list above.

• In the **Description** field give details of the sale/service (e.g. 'Erected shelves in kitchen', 'Sale of books').

• Enter the **Amount** you are charging the buyer. If the amount includes cents, use a decimal point not a comma.

• If your exchange uses a transaction levy it will be added to every sale that you enter. This effectively reduces the amount you are entering by the amount of the levy. The buyer will also be levied and this will effectively increase the price by the amount of the levy. Levies go to the 'Treasury' of your exchange, which holds them until the Administration requires additional revenue for running the exchange.

• The **date** of entry is added automatically. The date recorded by the system might be different to the date entered on the Trading Slip, as the slip date is usually the date of the

actual sale while the system date is always the date on which the transaction information is entered.

After you have entered the required information press the [Submit] button. You will then be asked to confirm the information you have just entered. If any of the details are incorrect press the [Cancel] button, which will take you back to the form where you can correct it/them.

If the information is correct, press the [Confirm] button and the information will be saved in your account. It will be reflected immediately as a credit in your Statement of Account and as a debit in the buyer's Statement of Account.

After submitting the information a "Transaction Successfully Recorded" page will appear, where you are presented with various options to proceed: delete the offering related to the trade; update the offering; enter another transaction; log out or go back to the home page.

If you make an error entering a transaction (e.g. you typed the amount '100' instead of '10') you have **45 days** to correct the error by going to 'My Statement of Account' on the home page of your account. This lists all your sales and purchases. At the bottom of the list all sales that you have made in the past 45 days are editable. Click on the green text in the 'Description' column and this will allow you to edit the sale, or delete it. Use this feature to refund a buyer rather than getting the buyer to enter a counter transaction.

If you need to correct (or **delete**) **a transaction** record older than 45 days you will need to contact your local area co-ordinator or the administrator. They have a 60 day window period to alter/delete transactions.

Enter Single Transaction (Quick)

Description

This is where you, as the seller, enter the transaction details of the sales you have made. You can only enter information relating to your trading account. If you are entering details for another person then you must first obtain their login details and log in as that person.

This form is used when you know the buyer's account number. If you do not know the buyer's account number, use the *Enter single transaction (list)* option from the home page of your account. This lists all members and you can select the buyer from the drop-down list.

If you have a lot of transactions to enter use the *Enter Multiple Transactions* form or the *Paste Transaction Data* form instead of this one. You can access them from the home page of your account.

The information that you enter here should be that obtained from a Trading Slip signed by the buyers of your goods and services. If you have no signature or written confirmation of the amount(s) entered here, you have no comeback if the buyer challenges your entry.

Usage

Enter the **buyer's account number** in the first line. This must be the full 8-character account number (e.g. ABCD1234). The buyer can be from your exchange or any other exchange.

Enter a **description** of the sale in the second line (e.g. '2 doz. eggs', 'Books', 'Camera repair').

Enter the **amount** in the bottom line. Only numbers and the decimal point are allowed

here.

After you have entered the required information press the [Submit] button. You will then be asked to confirm the information you have just entered.

If the information is correct, press the [Confirm] button and the information will be saved in your account. It will be reflected immediately as a credit in your Statement of Account and as a debit in the buyer's Statement of Account.

After submitting the information a "Transaction Successfully Recorded" page will appear, where you are presented with various options to proceed: delete the offering related to the trade; update the offering; enter another transaction; log out or go back to the home page.

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The **date** of entry is added automatically. The date recorded by the system might be different to the date entered on the Trading Slip, as the slip date is usually the date of the actual sale while the system date is always the date on which the transaction information is entered

If activated by your Administrator, a transaction levy is added to every sale that you enter. This effectively reduces the amount you are entering by the amount of the levy. The buyer will also be levied and this will effectively increase the price by the amount of the levy. Levies go to the 'Treasury' of your exchange, which holds them until the Administration requires additional revenue for running the exchange.

If you made an error entering a transaction (e.g. you typed the amount '100' instead of '10') or if you want to cancel the transaction, you have **45 days** to make the correction by going to 'My Statement of Account' on the home page of your account. This lists all your sales and purchases. At the bottom of the list all sales that you have made in the past 45 days are editable. Click on the green text in the 'Description' column and this will allow you to edit the sale, or delete it. Use this feature to refund a buyer rather than getting the buyer to enter a counter transaction.

If you need to correct (or delete) a transaction record older than 45 days you will need to contact your local area co-ordinator or the administrator. They have a 60 day window period to alter/delete transactions.

Enter Multiple Transactions

Description

This form is used for entering up to 50 transactions at one time. It can be used for entering transactions with buyers from your own exchange and from other exchanges.

Like the other transaction input forms, this is where you, as the seller, enter the details of the sales you have made. You can only enter information relating to your personal account. If you are entering information for another person then you must first log in as that person.

Usage

To enter more than the default five sales, select the number of sales you would like to enter from the 'Sales to enter' drop-down list. This will increase the number of rows displayed.

The information that you enter here should be that obtained from a Trading Sheet or Trading Slips signed by the buyers of your goods and services. If you have no signature or

written confirmation of the amount(s) entered here, you have no comeback if the buyer challenges your entry.

• Enter the buyer's full 8-character account number (e.g. ABCD1234). If you enter the account number incorrectly, you will receive an error message on the confirmation page that appears after pressing the [Submit] button. Press the [Cancel] button to go back and correct it.

The first four letters of your exchange's account number will appear in the 'Buyer' field. If the buyer is from your exchange, simply add the four-digit account number to the end of the four-letter prefix. If the buyer is not from your exchange, delete the four-letter prefix and enter the full eight-character account number of the buyer.

• If required, use a decimal point in the **Amount** field, not a comma or any other character.

• In the **Description** field give details of the sale/service (e.g. 'Erected shelves in kitchen', 'Sale of books').

• If activated by your Administrator, a transaction levy is added to every sale that you enter. This effectively reduces the amount you are entering by the amount of the levy. The buyer will also be levied and this will effectively increase the price by the amount of the levy. Levies go to the 'Treasury' of your exchange, which holds them until the Administration requires additional revenue for running the exchange.

• The **date** of entry is added automatically. The date recorded by the system might be different to the date entered on the Trading Slip, as the slip date is usually the date when the sale took place while the system date is the date on which the transaction information is entered.

After you have entered the required information press the [Submit] button. You will then be asked to confirm the information you have just entered.

If any of the details are incorrect press the [Cancel] button, which will take you back to the previous form where you can correct it/them. If you have entered an account number incorrectly you will receive an error message and the rest of the information will be blank. Press [Cancel] to go back and correct it.

If the information is correct, press the [Confirm] button and the information will be saved in your account. Each entry will be reflected immediately as a credit in your Statement of Account and as a debit in the buyer's Statement of Account.

After submitting the information a "Transaction Successfully Recorded" page will appear, where you are presented with various options to proceed: delete the offering related to the trade; update the offering; enter another transaction; log out or go back to the home page.

On submitting the information the buyers will be emailed a notification stating that their accounts have been debited by the amount you entered.

If you made an error entering a sale (e.g. you typed an amount of '100' instead of '10') you have **45 days** to correct the error by going to '9. My Statement of Account' on the home page of your account. This lists all your sales and purchases. At the top of the list all sales that you have made in the past 45 days are editable. Click on the green text in the 'Description' column and this will allow you to edit the sale, or delete it. Use this feature to refund a buyer rather than getting the buyer to enter a counter transaction. Doing the latter means that you will pay the transaction levy twice.

If you need to correct (or delete) a transaction record older than 45 days you will need to contact your local area co-ordinator or the administrator. They have a 60 day window period to alter/delete transactions.

Paste Transaction Data

Description

This is where you, as the seller, enter the details of the sales you have made. You can only enter information relating to your personal account. If you are entering information for another person then you must obtain their login details and log in as that person.

Use this form to enter the details of an unlimited number of sales at one time. You may type the information into the box or prepare it offline and copy and paste it into the box. Using the latter method allows you to minimise your time on line.

You may enter sales where the buyer is in your exchange or in other exchanges.

Usage

Sale information must be entered in the following format:

 Buyer's account number
 Description
 Amount

Each sale takes up three lines and each of the above must be on a separate line. Enter sales as in the example below:

 ABTE1234
 Erected bookshelves
 100
 BCTE0012
 Travel book & atlas
 155.50
 DBTE0101
 Organic vegetables
 250

Rules:

- Account numbers are 8 characters: the first four represent the exchange and the last four the buyer's account number in that exchange (e.g. ABCD1234)
- The Description field should contain text describing the nature of the sale
- The Amount field may only contain numbers and the decimal point. Do NOT include the currency symbol of your exchange (e.g. 123, NOT T123)

Should you make a mistake on any line the whole sale will be negated and an error message will appear on the confirmation page. If you leave out a line all subsequent sales will be negated. When an error is made, press the [Cancel] button on the confirmation page to correct the error.

The information that you enter here should be that obtained from a Trading Sheet or Trading Slips signed by the buyers of your goods and services. If you have no signature or written confirmation of the amount(s) entered here, you have no comeback if the buyer challenges your entry.

If you make an error entering a sale (e.g. you typed an amount of '100' instead of '10') you have **10 days** to correct the error by going to '9. My Statement of Account' on the home page of your account. This lists all your sales and purchases. At the top of the list all sales that you have made in the past 10 days are editable. Click on the green text in the 'Description' column and this will allow you to edit the sale, or delete it. Use this feature to refund a buyer rather than getting the buyer to enter a counter transaction. Doing the latter means that you will pay the transaction levy twice.

• A **transaction levy** is added to every sale that you enter. This effectively reduces the amount you are entering by the amount of the levy. The buyer will also be levied and this will effectively increase the price by the amount of the levy. Levies go to the exchange's 'Treasury' account which holds them until the CES Administration requires additional revenue for running the system.

• The **date** of entry is added automatically. The date recorded by the system might be different to the date entered on the Trading Slip, as the slip date is usually the date when the sale took place while the system date is the date on which the transaction information is entered.

After you have entered the required information press the [Submit] button. You will then be asked to confirm the information you have just entered.

If any of the details are incorrect press the [Cancel] button, which will take you back to the form where you can correct it/them. If you have entered an account number incorrectly and error message will appear and the rest of the information will be blank. Press [Cancel] to go back and correct it.

If the information is correct, press the [Confirm] button and the information will be saved in your account. Each entry will be reflected immediately as a credit in your Statement of Account and as a debit in the buyer's Statement of Account.

Each buyer will receive an email notifying them that their account has been debited by the amount you entered.

Online Invoice

Description

Use this form to generate an Online Invoice that will be emailed to the buyer of your goods or services.

Please note: The invoice function is for notifying your buyers only. It does not modify any data in the database. It does not record your sales and no record of the invoice is kept. Use one of the transaction functions under the 'Seller Actions' sub-heading on the home page for recording your sales (and crediting yourself and debiting your buyers).

While in most cases of trading on the CES an invoice is not necessary, there might arise situations where you wish to send an invoice. For example, you might have quoted an hourly rate for a job but could not specify precisely how many hours would be required. An invoice is then a statement of the hours you spent on the job and provides the buyer with the total amount that you will be debiting them.

There are many other situations in which an invoice would be useful, but it is most useful if you just want to keep a record of your trades.

The sending of an invoice is also a signal to the buyer that you want to be sent a Trading Slip or that you are going to credit yourself and debit the buyer.

Usage

By filling in the details on this form and pressing the [View] button, you will be shown an on-screen replica of the invoice that will be emailed to your buyer. On pressing the [Send] button the invoice will be emailed to the buyer and a copy of it will be emailed to you for reference purposes. You may also wish to print out a copy for your records.

When entering details, each row must be completed in full. Only numbers are valid in the

'Units' column and only numbers and the decimal point are valid in the 'Unit Price' column.

• In the **Description** field enter details of what was provided (e.g. "doz eggs", "Replaced kitchen sink", "Back massage", "Boxes of vegetables").

• **Units** means the quantity of the items provided. Most often this will be 1. You can only fill in numbers in this column so do not attempt to write "1 doz" or "2 bunches"!

• In the **Unit Price** column fill in the price of one unit of what you provided. If you provided a once-off service you would have '1' in the 'Units' column and the total price in the 'Unit Price' column. Only numbers and the decimal point may be entered in this column.

• If there were any delivery, transport or postage charges then fill in the amount in the **Shipping** column.

A unique Invoice Number will be generated by the system and will appear on your invoice. The date will also be inserted automatically, and will be the current date.

All calculations are done automatically, which you can check on the replica that is shown on the screen before you press the [Send] button.

Buyer Actions:

Recommendations

Description

The 'Recommendations List' is a list of sellers created by buyers who have been satisfied with what they have received.

Usage

Should you wish to give a recommendation to someone who has delivered goods and/or services to you then click the [Give Recommendation] button. This will open the **Give a Recommendation** form where you can enter your recommendation.

To view the recommendations received by a particular member, go to the member's record by clicking on the [Members] button and selecting the member from the drop-down list. At the bottom left of the member's record click on the recommendations button. This will list the member's received and given recommendations and you will be able to add your own if you wish.

Recommendations remain on the general list for six months and for individual account holders for one year, whereafter they cease to be shown.

• The **Added** column shows when the recommendation was entered.

• The **Received by** column lists the sellers who received recommendations. Click on the name to access the member's profile.

• The **Given by** column lists the names of the buyers who gave the recommendations.

• The **For** column briefly describes the goods or service received by the buyer. If you were the buyer then the title in this column will be green and clickable. This enables you to **edit** the recommendation or **delete** it.

• The **Comment** column is the recommendation given by the buyer.

To print this list of recommendations click on the printer icon at the left end of the horizontal grey bar. This will open up a printer-friendly version of this list in a new window.

Online Trading Slip

If you cannot meet face-to-face with the seller to hand over a paper Trading Slip or do not wish to post or fax one, send an online Trading Slip using this form. While this online version has no signature and is therefore not a legal document, the email sent to the seller contains your name and email address, which it gets from the CES database. Before sending an online Trading Slip, check first with the seller if it is acceptable to do so.

Select another **Group** if the seller is not in your CES exchange. You would do this if the seller is in a remote exchange; otherwise ignore this drop-down list of exchanges.

Select the seller's name and account number from the **Send to:** drop-down list. The seller will not appear on the list if he/she does not have an email address.

Fill in the **Amount** of the transaction, and a **Description** for the trade.

The seller will receive an automatically-generated email (the Online Trading Slip) which authorises him or her to enter the information into the 'Enter Transaction' feature of his or her account. This will debit your account for the amount indicated and credit the seller's.

You will receive by email the 'counterfoil' of the Online Trading Slip; an acknowledgment of sending the Slip. It will contain the same details as on the Online Trading Slip and represents your confirmation of 'paying'. Store it in an email folder in case there is a dispute with the seller.

Online Order Form

Description

Use this form to generate an Online Order Form that will be emailed to the seller from whom you would like to purchase something. It can also be used as a query form to find out more about an offering.

Usage

By filling in the details on this form and pressing the [View] button, you will be shown an on-screen replica of the order form that will be emailed to the seller. On pressing the [Send] button the order form will be emailed to the seller and a copy of it will be emailed to you for reference purposes. You may also wish to print out a copy for your records.

• In the **Description** field enter details of what you require (e.g. "Dozens eggs", "Hours massage", "Boxes mixed vegetables", "Boxes curry powder").

• **Qty** means the quantity of the items required. This could be physical quantity or hours. You can only type numbers in this column so do not attempt to write "1 doz" or "2 bunches"! For most services you don't require a quantity so leave this blank.

• Use the **Comment/Query** box to provide any other detail that you feel the seller should know. This could be a question about the product or service, delivery information, contact details, availability etc.

A unique Order Number will be generated by the system and will appear on your order form. The current date will also be inserted automatically.

Querying:

Trading Activity

Description

This page shows the amount of trading activity for the trader selected. By default the figures relate to all trading since the account holder's first trade.

Usage

To view trading activity for other time periods, select a time period from the **Period:** drop-down list. Alternatively enter the number of days' trading activity you would like to see in the **Days:** text box, and press the button to activate it.

This page shows the following trading information about the particular trader:

- Total number of **sales**
- Total **income**
- Total number of **purchases**
- Total **expenditure**
- Total amount of **levy** contributions
- Current **balance**
- **Sales as percentage** of total trades
- **Purchases as percentage** of total trades
- **Sales/Purchases** ratio
- **Income/Expenditure** ratio
- Total number **trades** (total sales + total purchases)
- Total **turnover** (total income + total expenditure
- **Average value of sales** (income/total sales)
- **Average value of purchases** (expenditure/total purchases)
- Trader's current **credit limit**
- Trader's current **debit limit**
- **Over credit or debit limit** (amount)
- **First trade** (date: either sale or purchase)
- **Last sale** (date)
- **Last purchase** (date)

Statement of Account

Description

This is your personal statement of account. It is not accessible to others.

By default the statement shows trades (sales and purchases) you have made during the current month. If you have not traded during this period your statement will reflect zeros, though your current balance of account will be shown in the 'Total' row at the bottom.

Usage

Click on the **Period** drop-down list to select a pre-set period for which you would like to see your statement, or select a particular period from the **View from** and the **View to** dates and press the [Go] button at the right.

To **email** yourself a formatted, printable version of the statement, click on the email icon at

the right hand side of the horizontal grey bar. To email a statement showing other than the default time period (30 days), select the required time period first, then when it appears on the screen click on the email icon.

To **print** your statement, in a format without the buttons and drop-down menus, click on the printer icon at the right hand side of the horizontal grey bar. To print a statement showing other than the default time period (30 days), select the required time period first, then when it appears on the screen click on the printer icon.

• The **Date** column gives the date on which the item was added to your account.

• The **Account No - Name**. column gives the account number and name of the person with whom the transaction was conducted. Red text indicates a purchase.

• The **Description** column gives details of the nature of the transaction. Red text indicates a purchase. Sales you have made within the past 10 days are shown in **green**, meaning that if you click on the description you will be able to edit the record. You may change any of the details of the transaction or delete the entire record. Adjusting the amount will adjust your overall figures as well as those of the buyer and the entire exchange. The same applies if you delete the record. Use this feature if you have made a mistake when entering a transaction or you need to refund the buyer for any reason.

• The **Credit** column gives the amounts you received for your sales.

• The **Debit** column gives the amounts you paid for your purchases. Debits are indicated in red.

• The **Levy** column gives the amounts you have contributed to the levy.

• The **Balance** column gives your balance after each transaction. Black text indicates that your balance is positive ('in the black'); red text indicates that your balance is negative ('in the red').

There is no stigma in having a negative balance as it is required by the system that the sum of all amounts 'in the red' has to be equal to the sum of all amounts 'in the black'. Best is to have a balance hovering around zero as this indicates that you have a healthy balance: you are getting as much out of the system as you are giving to it. If your balance remains in the red for a prolonged period and is steadily increasing (negatively) then it is time to do something about it. You need to make more sales and fewer purchases to rectify this situation. Consider adding more and revising your current offerings.

Your overall balance is reflected in the 'Member Balances' feature, which everyone can see. People will notice if you are running a heavy negative balance and may not want to trade with you on account of this.

Miscellaneous

Trading Documents

Trading Sheets can be used in a number of ways:

- They can replace the use of Trading Slips (cheques), which are often inconvenient and liable to get lost.
- They are most frequently used by sellers at markets. They are used to record items sold, and then the information is entered into the system after the market.
- They can also be used for normal trading so that sales can be recorded offline and then entered as a batch at a later time.

- They can be used by traders who are selling goods for other traders. For example, if a seller has left a range of goods at a stall at a market or with a shopkeeper to sell, the buyers' information can be recorded on the sheet instead of using Trading Slips, which can easily get mixed up with other Trading Slips.

When using these sheets, it is best that the seller fills in the information and gets the buyer to sign it. Buyers tend to fill in the forms very poorly and often illegibly!

The HTML version can be printed directly from your browser screen; the MS Word version has to be downloaded and you have to have the associated program installed on your computer to print it.

Trading Slips

Trading Slips are simple cheque-like slips that buyers can use to 'pay' their sellers. They convey the essential transaction information that needs to be entered into the system by the seller in order to credit him or herself and debit the buyer.

Send an **Online Trading Slip** when not meeting the seller face-to-face or download one of the printable formats (2—6) in the list.

Online Trading Slips

If you send an online Trading Slip you will be identified to the seller by your name and email address, which will be taken from the database. The date will also be sent automatically.

The name of the seller will not appear on the 'Send to' dropdown list if he or she has no email address. To find a name quickly, press the first letter of the seller's (sur)name, repeatedly if necessary.

Read how to send an Online Trading Slip to a remote buyer by clicking the [Help] button on that page.

Paper Trading Slips

If you have downloaded one of the printable formats you will be able to print your own Trading Slips whenever you need them. HTML can be printed directly from your browser screen; the other formats are more detailed and require the associated programs to be installed.

Each printed slip has a counterfoil that is kept by the buyer. The slip and counterfoil are together signed records that buyers and sellers should keep for reference purposes should there be any disagreement or dispute. A slip can also be regarded as the receipt that a buyer issues for services or goods received.

A Trading Slip differs from a conventional cheque in that the buyer writes his or her name (and membership number) on it and not that of the seller.

You do not need to use these slips. You may convey the information verbally but by writing it down the chances of giving the wrong information are minimised, and without them you have no signed record of your trades. You may of course create your own forms or simply write the necessary information on any piece of paper.