



XO Limited

Barter Software Feature Comparison

	TradeWorks	eValues	GETS	DoBarter	BCI	XO
GENERAL DIFFERENCES						
Number of fulltime developers	Nil	1	1	1	1	24
Only develop barter software	X	X	X	✓	X	X
Owens their own barter exchange	X	X	X	✓	✓	X
24 x 7 x 365 live technical support	X	X	X	X	X	✓
Software hosted in 4 different physical sites for redundancy	X	X	X	X	X	✓
Real armed guards for data site security	X	X	X	X	X	✓
You can keep a copy of the source-code if company ceases business	X	X	X	X	X	✓
XO has 24x7 remote system site monitoring via security camera	X	X	X	X	X	✓
SSL and Bank-grade security in place	X	SSL	SSL	SSL	SSL	SSL & bank
Software able to be hosted on exchanges own site (additional cost and POS will not work)	✓	X	✓	X	X	✓
Online knowledge-base and helpdesk	X	X	X	X	X	✓
Local & toll-free telephone support	X	X	X	✓	✓	✓
Printed user manual	✓	X	✓	X	X	✓
Free online barter resources	X	X	X	X	X	✓
INTERFACE						
All graphics on entire site can be changed	X	X	X	Partly	Partly	✓
All email text can be changed	X	X	X	X	X	✓
All website text can be changed	X	X	X	X	X	✓
Works in any language	X	X	X	X	X	✓
Users can select their language	X	X	X	X	X	✓
All mobile phone text can be changed	N/A	N/A	X	N/A	N/A	✓
Exchange can disable viewing of its members details and offerings if user not logged in	X	X	X	X	X	✓
Exchange can disable/hide unused categories if no offering in that category	X	X	X	X	X	✓
Clean easy-to-use member interface	X	X	X	✓	✓	✓
MEMBER ACCESS						
Members can have multiple branches	X	X	X	X	X	✓
Members can give own staff access with different security	X	X	X	X	X	✓
TELEPHONE BANKING						
You can have your own local number (\$20pm)	X	X	X	X	X	✓
Transfer barter dollars over phone	X	X	X	✓	✓	✓
Pay cash fees over phone	X	X	X	X	X	✓
Listen to foreign currency exchange rates	X	X	X	X	X	✓
Debit a plastic card over the phone	X	X	X	X	X	✓
Request username/password reminder	X	X	X	✓	✓	✓
Local number phone banking throughout USA & Canada	X	X	X	X	X	✓
PLASTIC TRANSACTION CARDS (POS)						
Exchange can issue plastic cards	X	X	X	X	X	✓
Members can order, edit and cancel plastic cards online	X	X	X	X	X	✓
Members can order, edit and cancel phone banking access online	X	X	X	X	X	✓
Debit a plastic card online	X	X	X	X	X	✓
Mobile telephone banking / SMS banking	X	X	✓	X	X	✓
POS cards work in existing members swipe machines	X	X	X	X	X	✓
You can print your own POS cards	X	X	X	X	X	✓
ONLINE FUNDS TRANSFER						
Transfer funds online	X	✓	✓	✓	✓	✓
Transfer funds in multiple currencies	X	X	✓	X	X	✓
Members can transfer funds to non-exchange members	X	X	X	X	X	✓
Non-exchange members can be charged different fee rates if they accept	X	X	X	X	X	✓
Send barter dollars to non-members email address	X	X	X	X	X	✓
Send barter dollars to non-members mobile phone	X	X	X	X	X	✓

BUY & SELL ONLINE						
Members can buy and sell online	X	X	X	X	X	✓
Members can print shipping/packing slips online	X	X	X	X	X	✓
Members can bulk upload from CSV/Excel to sell online	X	X	X	X	X	✓
Members can ask questions of sellers online	X	X	X	X	X	✓
Members can rate one another online	X	X	✓		✓	✓
Members listings sorted by their desire to accept trade	X	X	X	X	X	✓
Online quotes and acceptance	X	X	X	X	X	✓
Listings expire based on sellers expiry dates	X	X	X	X	X	✓
Limited time special offers from sellers	X	X	X	X	X	✓
Members can dispute online transactions	X	X	X	X	X	✓
Payment only released when buyer confirms receipt of order	X	X	X	X	X	✓
Categories can be edited by exchange	X	X	X	X	X	✓
AUTO-BROKING						
Saved searches	X	X	X	X	X	✓
Auto-notify customers via email when new listings meet their saved search requirements	X	X	X	X	X	✓
Schedule newsletters and email to auto-promote listings	X	X	X	X	X	✓
Brokers can produce customized directories and email immediately to members	X	X	X	X	X	✓
Alert customers to their mobile phones	X	X	X	X	X	✓
Send scheduled and auto-reminders to mobile phones	X	X	X	X	X	✓
BROKERING						
Can have brokers, sub-brokers and agents	✓	Brokers only	Brokers only	Brokers only	Brokers only	✓
Brokers can create independent directories and newsletters	X	X	X	X	X	✓
Brokers, sub-brokers and agents can all earn commissions	✓	X	X	X	X	✓
Multiple levels of security dependant on role	✓	X	X	X	X	✓
DOCUMENT MANAGEMENT						
Store copies of paper documents electronically	X	X	X	X	X	✓
Store multiple versions of documents	X	X	X	X	X	✓
Approve and draft documents online	X	X	X	X	X	✓
CRM / SCHEDULING / TASK ASSIGNMENT						
Schedule calls to customers	X	X	X	X	X	✓
Create tasks and follow-ups	X	X	X	X	X	✓
Assign tasks to different staff members	X	X	X	X	X	✓
Make notes on accounts	✓	✓	X	✓	✓	✓
CRM status - Open, Pending, In-Progress, Closed	X	X	X	X	X	✓
Reporting on CRM	X	X	X	X	X	✓
STATEMENTS AND BILLING						
Batch and email statements to customers	X	✓	✓	✓	✓	✓
Print statements for customers	✓	✓	✓	✓	✓	✓
Download statements as CSV or Spreadsheet	X	X	X	X	X	✓
Customers can print or download statements as CSV/Spreadhee	X	X	X	X	X	✓
Search by transaction, member, credit to/from, date range, amount to from	X	X	X	X	X	✓
Email or fax copies of individual transactions	✓	X	X	X	X	✓
Can bill customers using your own credit card merchant system or through your own bank	✓	✓	✓	X	X	✓
FEES AND RATES						
Interest on overdue monies	✓	X	X	X	X	✓
Barter charge on buy and sell	✓	✓	✓	✓	✓	✓
Cash charge on buy and sell	✓	✓	✓	✓	✓	✓
Create multiple pricing plans and group members by named plan	✓	X	✓	X	X	✓
Monthly fees	✓	✓	✓	✓	✓	✓
Annual fees	✓	✓	✓	✓	✓	✓
Joining fees	✓	✓	✓	✓	✓	✓
Interest on barter dollar loans	X	X	X	X	X	✓
Interest if member in credit for too long	X	X	X	X	X	✓
Ad-hoc fees chargeable	✓	✓	✓	✓	✓	✓
Name pricing plans and let members select	X	X	X	X	X	✓