Setting Trader Limits for Carbon Offers
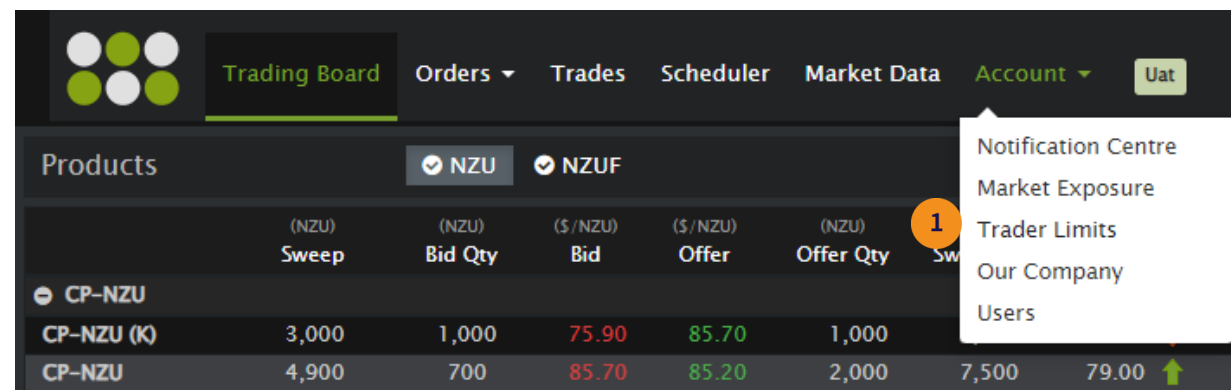
Quick Reference Guide

The Trader Limits feature enables the Company Admin to set and manage offer limits at both a companywide and individual Trader level.

This guide specifically focuses on how to set carbon offer limits on an organisation and its users.

Setting Trader Limits are optional but can help under the following use cases:

- Company Admins setting limits on individual Traders.
  - An example is where a Company Admin may want an internal process where certain large offers may need to be approved internally before they are allowed to made on emsTradepoint.
  - Eg A Trader wants to make an offer for say 100,000 NZUs but a trader limit is in place that only allows them to offer 50,000 units. This limit would stop the offer from being made and instead the user would have to talk to their Company Admin about raising this limit if to make the offer.
- Setting company-wide Trader limits to act as safeguards to protect against user errors.
  - An example is when a Trader makes an offer but Offers 85 NZUs for $1000/NZU instead of an intended 1000 NZUs for $85/NZU. Not a major issue for an offer but if this was a Bid, it would get matched immediately. This safeguard, therefore, is usually very helpful for carbon buyers.
  - Another example is if a user makes an offer but Offers 1000 NZUs for $10/NZU instead of an intended 1000 NZUs for $100/NZU offer. Had a trader limit been in place that does not allow offers to be made below a specified amount (eg $80/NZU), then this offer would not have been able to be made on screen (which would have likely resulted in a matched bid).

1 Navigate to the Trader limits screen by clicking 'Account ' and then selecting 'Trader Limits'

Creating an Offer

Trader Limits: Escrow NZU Sell

Export as CSV

Company wide trading limits

Please note, a trader will be unable to breach the Companywide Trading Limits regardless of what their Individual User Trading Limits may be set to.

	Max Bid Price ($/NZU)	Min Offer Price ($/NZU)	Max Order Value ($)	Max Order Quantity (NZU)	Last Set By
All Company		80	500000	10000	not set

2 **3** **4** **5**

Individual user trading limits

User	Max Bid Price ($/NZU)	Min Offer Price ($/NZU)	Max Order Value ($)	Max Order Quantity (NZU)	Last Set By
James Cameron		85		1000	Katene Mitchell
Harrison Ford					not set
Phoebe Waller					not set

6 **7**

Reset   Save

On the **Trader Limits** screen, you can set limits at a company level or at an individual user level.

NOTE 1 - A trader will be unable to breach the Companywide Trading Limits regardless of what their Individual User Trading Limits may be set to.

NOTE 2 -Where a limit has been set at a company and a Trader level, the lower of the two will apply, except in the case of the Min Offer Price control where the higher Price will apply

NOTE 3- Where no limit is desired, leave the field blank.

2 **Max Bid Price:** Relevant for Carbon Buyers only, this field isn't needed as a Carbon Seller, so can be ignored.

3 **Min Offer Price:** Enter the minimum allowable Price ($/NZU) when placing an Offer.

4 **Max Order Value:** Enter the Max Order Value: Enter the maximum daily total Value ($) of Orders.

5 **Max Order Quantity:** Enter the maximum daily Quantity (NZU) of Orders

6 The **Reset** button clears unsaved changes

7 Enter the required limits and click **Save**

Creating an Offer