CNHI Ad.Perks Training Manual – Display Order Entry

Created August 28, 2017

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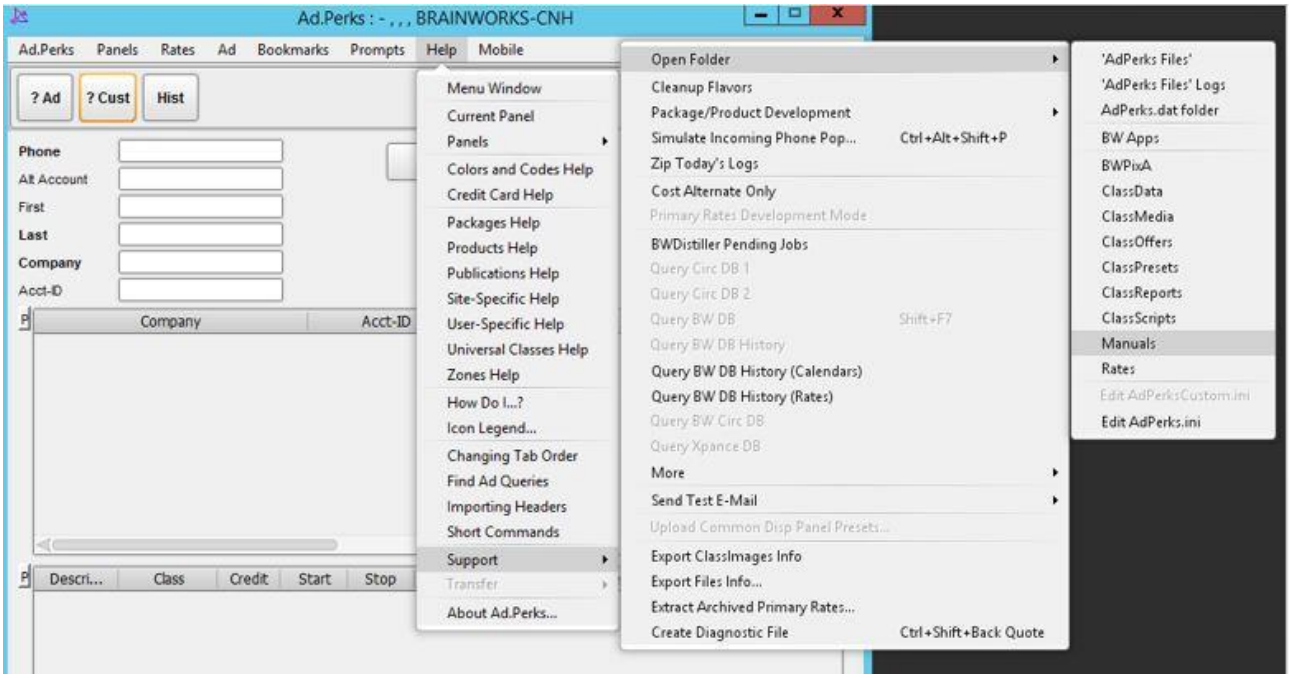
Training Manual Overview

This manual is designed to demonstrate basic steps of the Ad.Perks application to users such as:

- How to create, edit, or find clients
- Schedule, cost, and save ads
- Enter payments
- Print or email receipts, proofs, affidavits, or notices

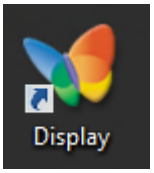
Detailed aspects not covered in this manual can be found in the Brainworks Ad.Perks User Manuals which can be found by going to **Help, Support, Open Folders, Manuals.** The manuals are called User A, User B, and User C. Also, the Ad.Perks Quick Start Manual has some good information.



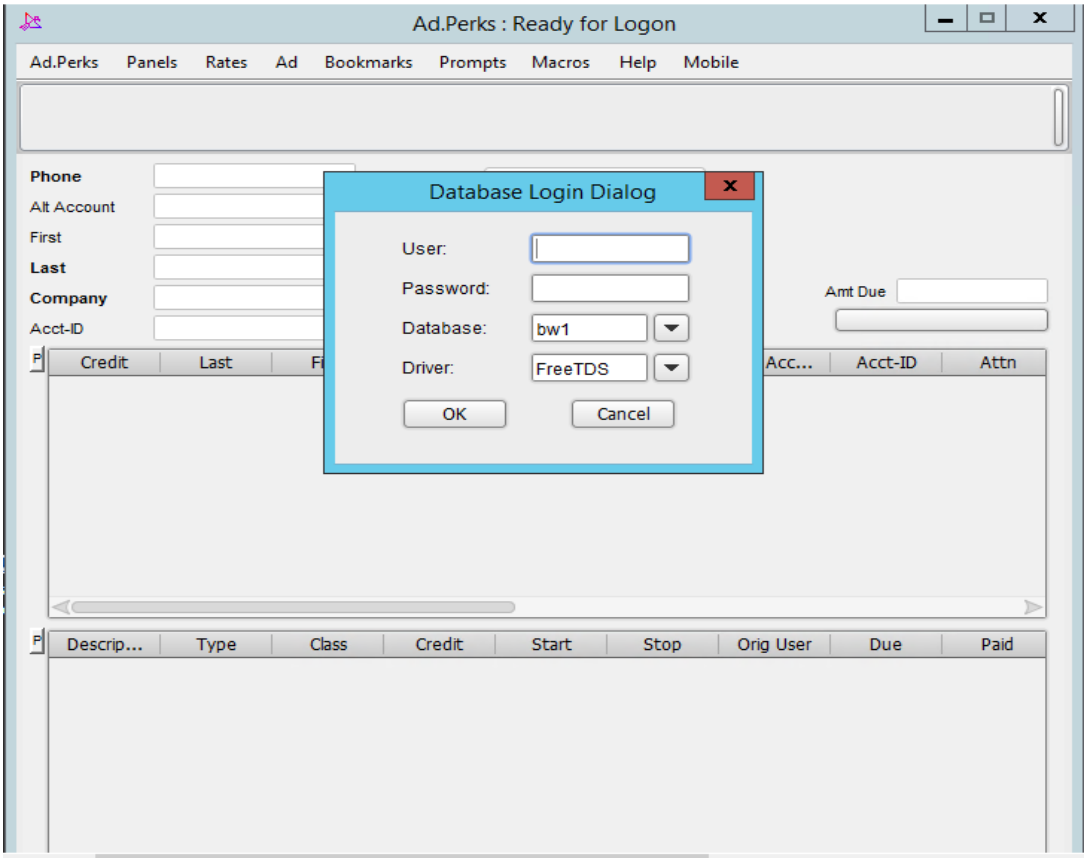
Throughout the manual, you will see sections labeled "Notes". Please feel free to use this space for any additional notes that you may want to make.

Connect & Log on to Ad.Perks

To connect to Ad.Perks from a PC, click on the icon resembling a butterfly, labeled as **Display**.



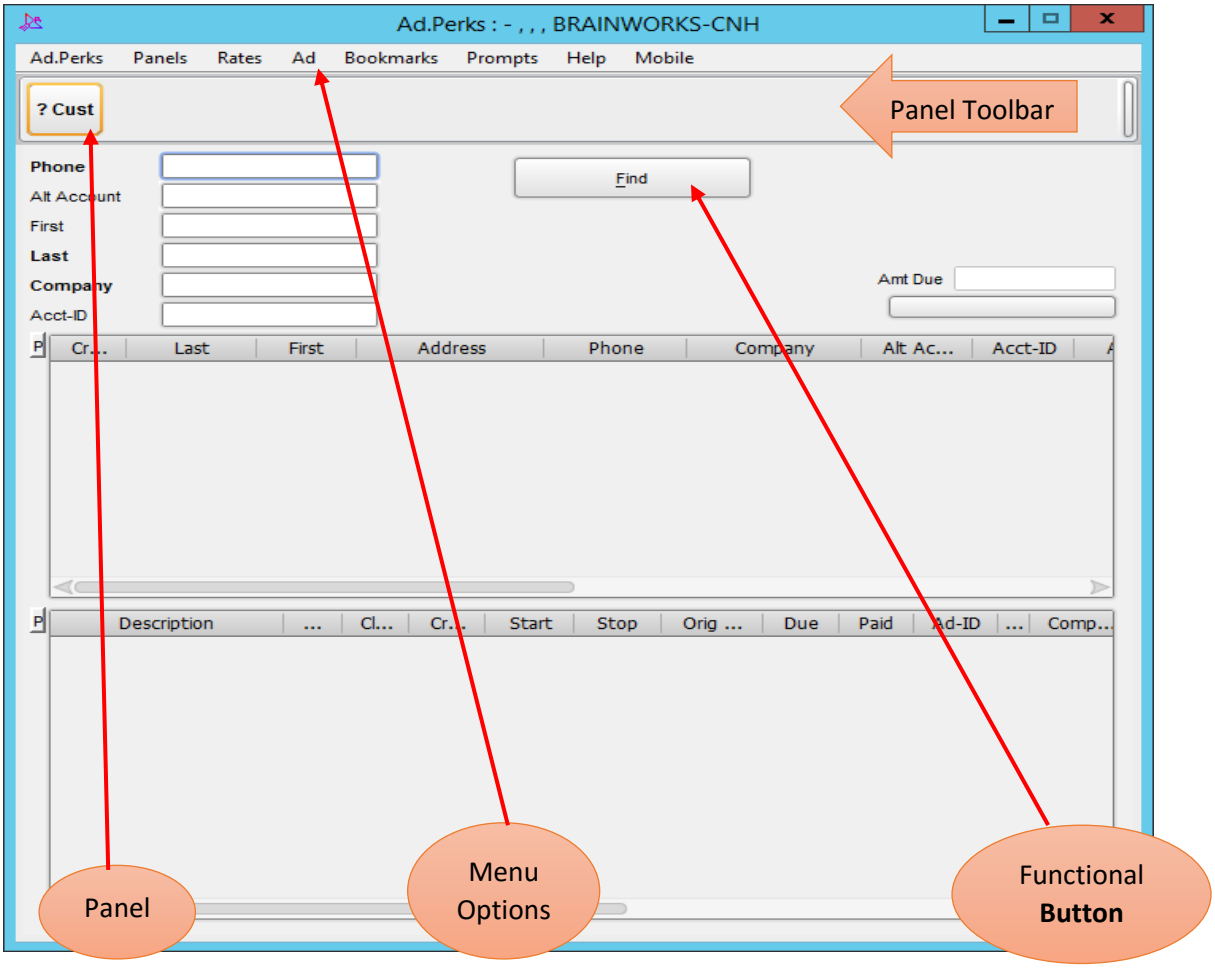
Once the application is launched, the following screen will appear:



Log on to the Ad.Perks Applications by entering your User Name (First Initial and Last Name) and Password, then click Log On.

Note: If you are launching more than one application, for example A/R and Ad.Perks, please wait for one application to launch completely before launching another.

After logging in, the user will be directed to the **Find Customer** panel.



GENERAL BEHAVIOR

Menu Options and shortcuts

Many functions in Ad.Perks may be performed by either clicking on the menu at the top of the screen or via keyboard shortcut keys. *Only menu items with key strokes next to the function have shortcuts; not all of them do.*

For example, once you have completed work on an ad, you must save it. To do so, you may click on:

- The **Ad.Perks** option in the menu at the top left of the screen and then selecting **Save** from the populated dropdown listing.
- Or you may use the shortcut command by simply holding down the **Ctrl+S** keys.

CTRL + S = SAVE

Panel Buttons and shortcuts

Within many panels, there are **buttons** that command functions. If the first letter of the button's title is underlined, such as the F on the **Find** button (listed above), you may perform the function by holding down the **Alt** key and pressing the letter that is underlined on the keyboard.

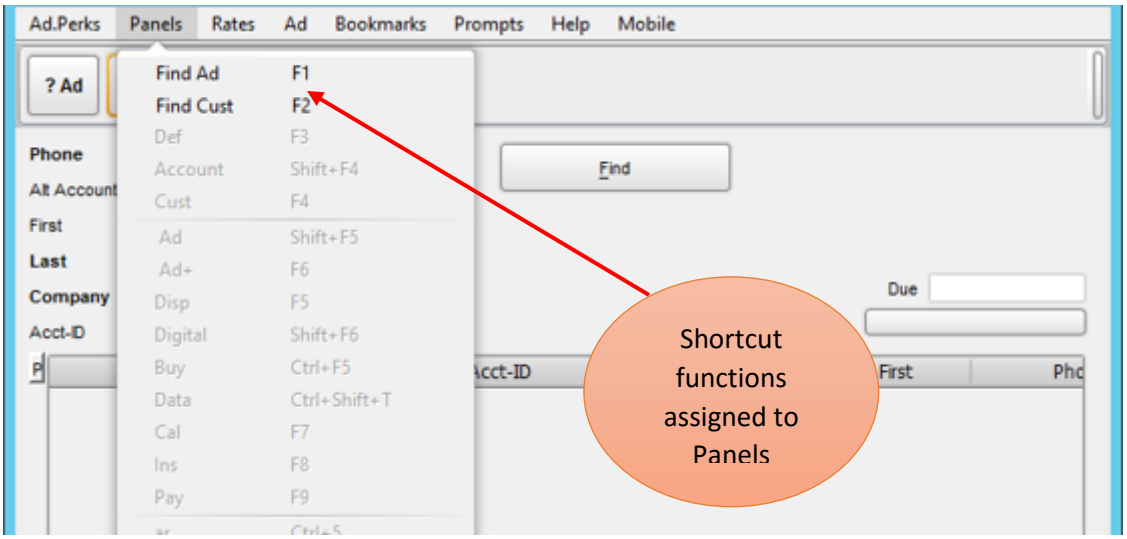
ALT + f = FIND

Navigating/Selecting Panels

- **Option 1** - If the desired panel is not already present on the toolbar, select Panels from the menu options at the top of the screen, then choose from the dropdown selection of Panels.

- **Option 2** - If the desired panel is already present on the toolbar, simply click on the listed panel.

- **Option 3** - A third option in selecting a desired panel is to utilize the assigned shortcut function, as each panel has its own shortcut function. This option would be most useful once the first two options are familiar to the user and the shortcut function has been memorized.
    a. Press the function key on the top row of the keyboard for the desired entry, such as F1 for **Find Ad** or F2 for **FIND CUST**. These function shortcuts are shown on the right side of the Panels dropdown menu.



Pinning Panels to the Toolbar

Once a customer has been selected from the **Find Customer** panel, three more panels will automatically load onto the Toolbar available to the user. Therefore, the user will never have to search for these three panels:

- **Cust** panel
- **Ad** panel
- **Disp** panel

The user will always have to retrieve any other panel each time that it is needed unless the user chooses to utilize the ***"☑ pin this to the toolbar"*** option. This option is available

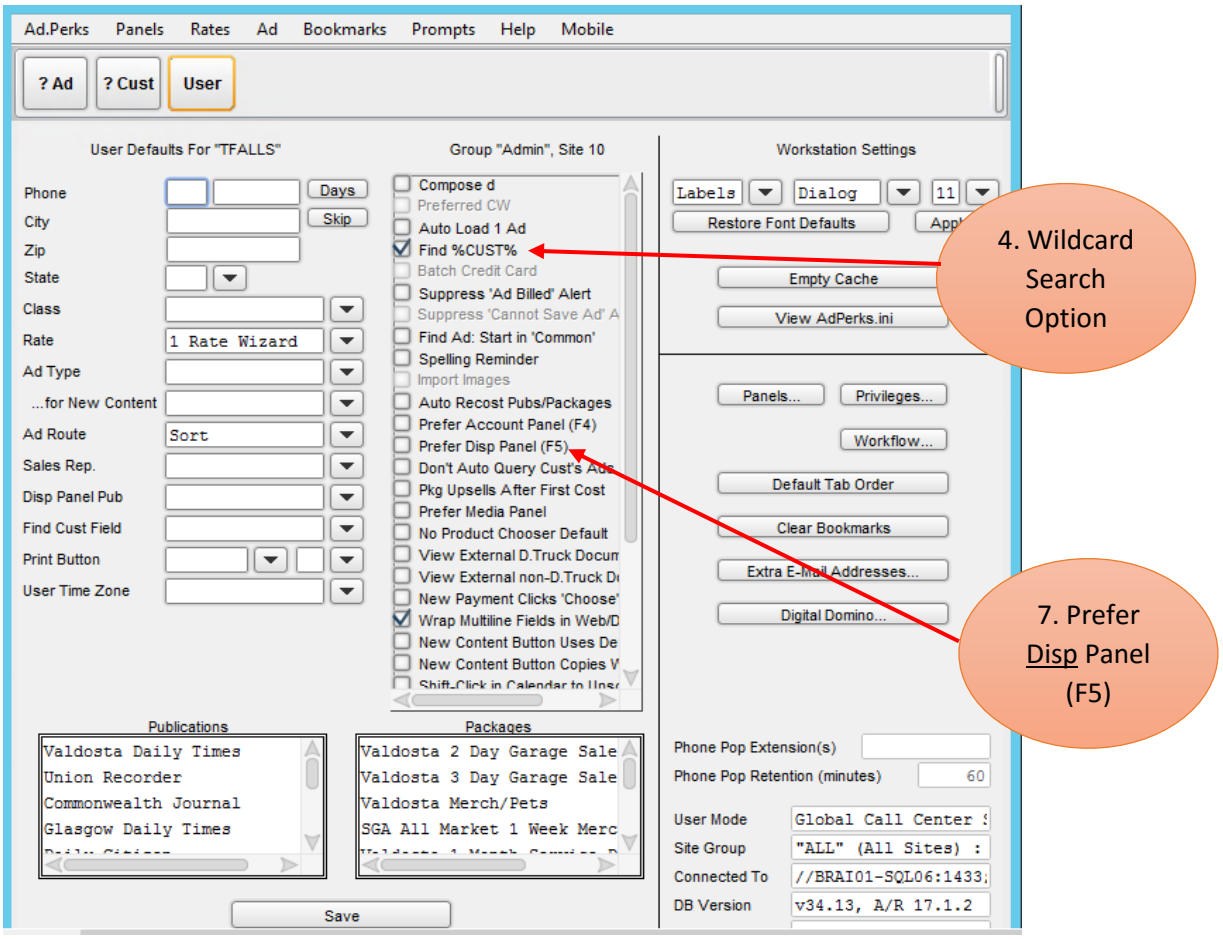
1. once the panel has been retrieved onto the Toolbar
2. is selected by hovering the mouse pointer over the desired panel
3. and then right-clicking and simply clicking a checkmark

Navigating entry fields within a panel

When moving from one entry field to the next, use the tab key for the most quick and convenient means of navigation. Use the Shift + Tab key combination when moving from one field to the previous.

SETTING UP USER DEFAULTS

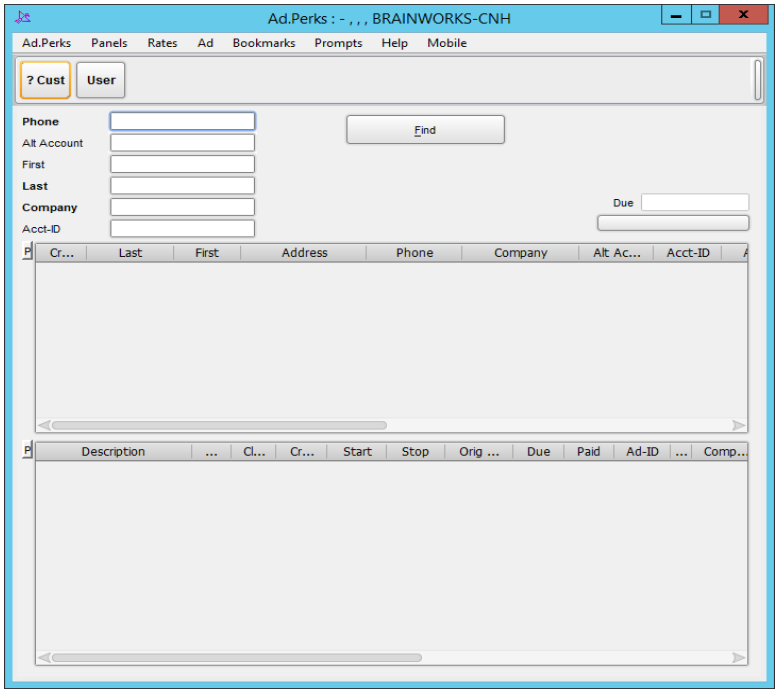
Before the user begins using the Ad.Perks application, the user will need to set up User Defaults. In order to do, navigate into the User panel.



At a minimum, set the following defaults then Click **Save**:

1. **Rate** field – select **1 Rate Wizard** from the dropdown options.
2. **Ad Route** field – select **Sort** from the dropdown options.
3. **Sales Rep** field – if you are an ad-taker, then select your sales rep number from the dropdown so that it defaults into your ads.
4. **Wildcard Search** option - ☑ "**Find %CUST%**" to enable the wildcard search option when using the First name, Last name, and Company fields in the Find Customer panel.
5. **Spelling Reminder** option – be advised NOT to use this option.
6. **Ad Type** field – if a user most often enters only one type of ad, then it may be advantageous to the user to set a default to that particular ad type. **(Optional)**
7. **Prefer Disp Panel (F5)** option - ☑ this option if the user will deal primarily with Display/ROP ads.

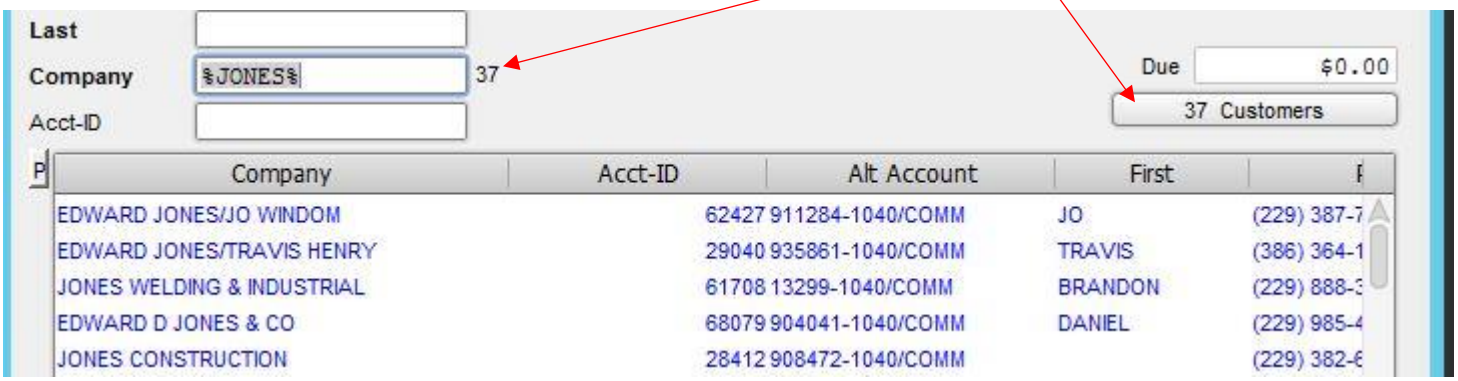
Find Cust Panel



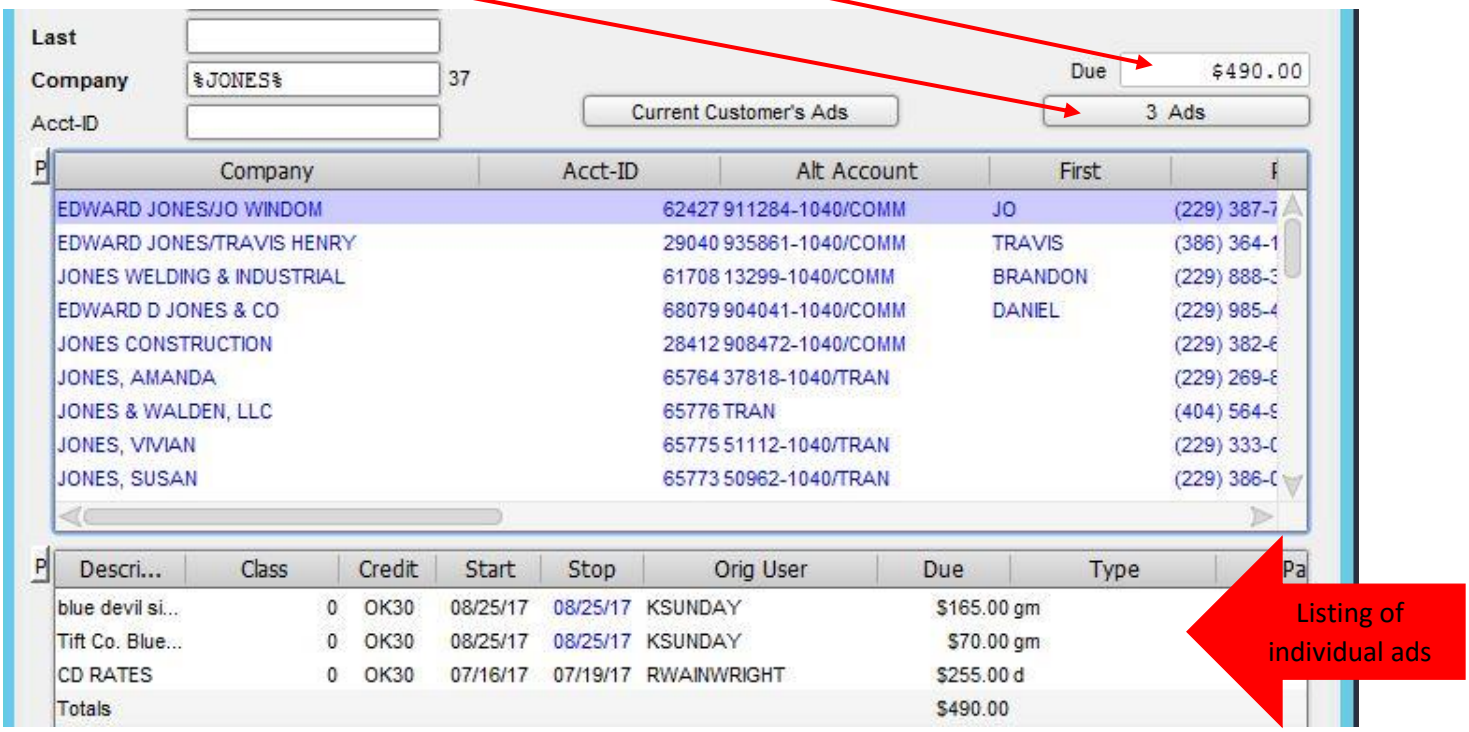
Before the user can schedule and create an ad for a customer, the user must first locate the customer from the **FIND CUST** panel. If the customer being located is not already listed in the database, then the user must set up this customer as a new customer in Ad.Perks.

The **FIND CUST** panel is displayed automatically once Ad.Perks is launched. If the **FIND CUST** panel is not already displayed, then retrieve it by clicking on the **FIND CUST** panel tab, or click **Panels > Find Cust,** or use the F2 keyboard shortcut.

In the **FIND CUST** panel, the user may search for a customer by one or more of the displayed search fields, and then pressing the **Enter** key or clicking the **Find** button. When a search is made, you are provided at a glance how many matches were found in the middle section of the panel. *This example lists 37 matches by searching for a Company name of "Jones". Also, notice the how the system uses the Wildcard Search Feature %_%.*



If the user clicks on any one match, the system will provide the customer's number of existing ads and how much the customer owes for those ads in the right side of the top section of the panel. The bottom panel provides a list of each of the individual ads. *Continuing with the example from the previous page, the very first of the 37 customer matches is selected. Thus providing further information that is specific only to that particular customer. This particular customer has three existing ads and owes $490.00 for those ads.*



You may open any ad on the list by double-clicking it. Or, you may schedule and create a new ad for the customer by switching to the Ad panel in the toolbar. If you find no match, you may create a new customer.

Search Fields

Users can search for customers using any of the following fields:

Phone: Enter an area code, if desired, then the 7- digit phone number. If you enter a default area code on the **USER** panel, then default area code will be placed in the phone field automatically when you click the **Find** button.

ALT Account: if a customer was converted from previous systems, then the previous system's account number can be used here. The legacy system's account number will be the old account number followed by a dash and a location code.

First: First name of the customer. This field is used in conjunction with the other fields and cannot be used alone.

Last: Last name of the customer

Company: Company of customer

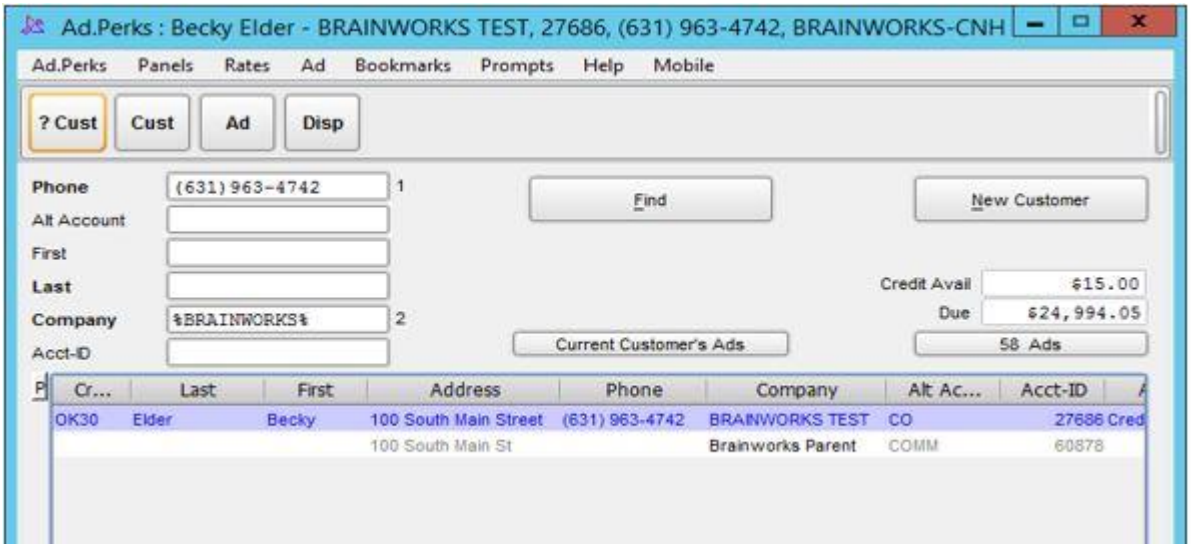
Acct-ID: Brainworks account number

Note: You may use the % character as a wildcard in most searches which will return all matches of the search criteria as opposed to only exact matches.

After filling in the search field(s), press the **Enter** key or click the **Find** button. The number of matches for each search field will appear to the right of the field.

Customers that match the search criteria will appear in the middle of the **FIND CUST Panel.** Exact matches for the search criteria will show in **Blue**. If the customer you wish to use is listed, click anywhere in the row. If the customer has any alternate addresses saved, the customer may appear multiple times, one additional time for each additional address.

If you wish to use this customer, click once on the customer row to load the customer. If this is not the appropriate customer and you need to add a new customer, Click on the **New Customer** button on the top right of the screen.



Above is an example of a search for phone # 631-963-4742 and company name %Brainworks%. The account in blue text indicates an exact match.

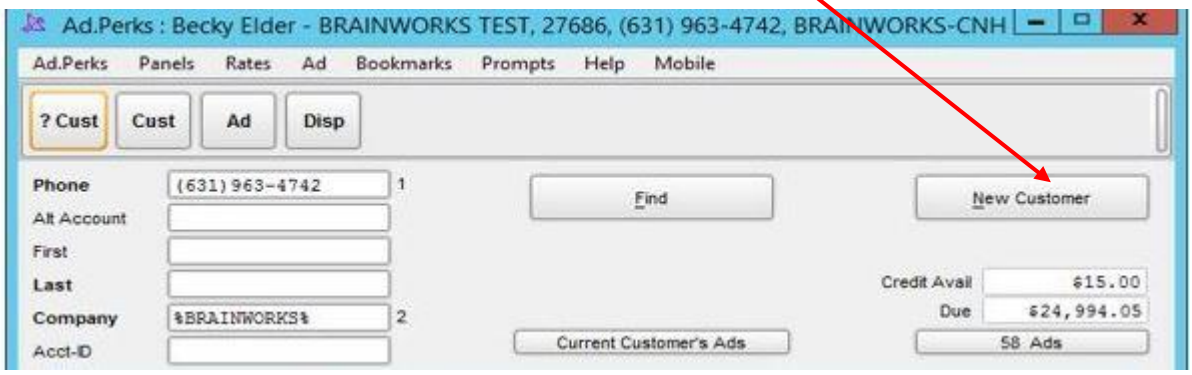
The total amount due and total number of ads for this customer are both shown in the top right hemisphere of this panel. This amount does not reflect any activity in Brainworks A/R.

Adding a New Client

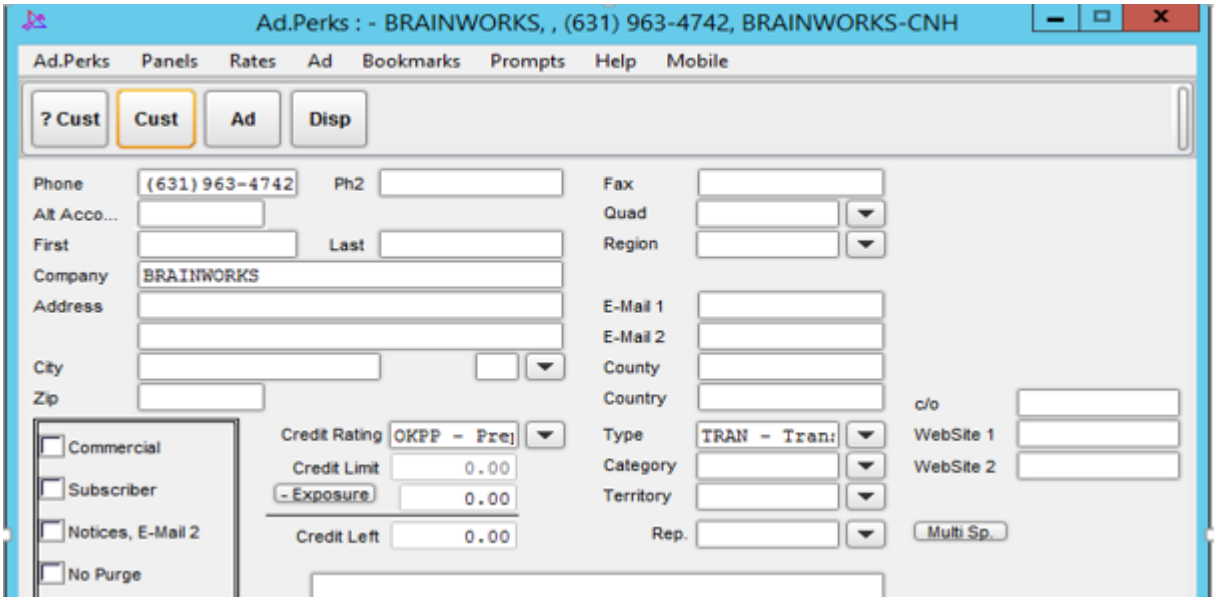
In order to populate the **New Customer** button, the user must first search by:

- <either> **phone number** AND the **Last Name**
- <or> **phone number** AND the **Company Name**

This is a control to eliminate duplicate accounts in the system.



Once confident a customer does not exist in the database, click the **New Customer** button. Clicking the **New Customer** button will navigate the user to the **CUST** panel, which is where the new client information will need to be entered.



The required fields for a new customer in the **Cust** panel are:

1. **Phone –** the search phone number will automatically populate in the phone number field.

2. **First Name** – if company is entered, first name is optional. This is the billing contact.

3. **Last Name** – if company is entered, last name is optional. This is the billing contact.

4. **Company** – optional if there is no company for the individual; enter only first and last name.

5. **Address** – One line is required; second is optional.

6. **City**, **State**, and **Zip** – after entering the Address line, Tab will take you to Zip field. Fill in zip and city and state will be automatically populated. If multiple cities exist for the zip code, a box will be displayed and you may select the correct city.

7. **Email address** –Only Private Party customers can be flagged with no email address; for commercial customers, it is required that an email address is obtained. If a commercial customer has no email, then management approval will need to be obtained to save this customer with no email address.

8. **Type** – this input field is for the type of client. This field most likely will default to TRAN for new transient advertisers. If **Commercial** happens to be selected for the client type, then the user would also need to select the **Commercial checkbox** in the CUST Panel Checkbox area as well.

9. **Category** – this input field is used for NAICS Codes. A master list of NAICS codes is available upon request.

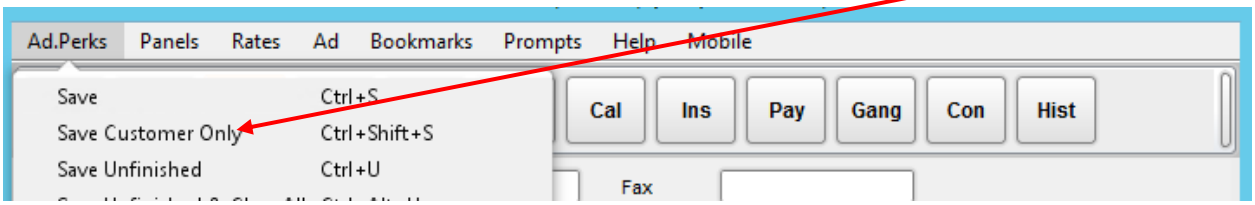
10. **Sales Rep** – if no rep has been assigned to this account, type your ad user number in the field.

11. **Commercial Checkbox (CUST Panel Checkbox area) –** this needs to be checked for **Commercial** customers, which is any customer who is NOT Private Party. It serves as a systematic switch for how a customer is billed.

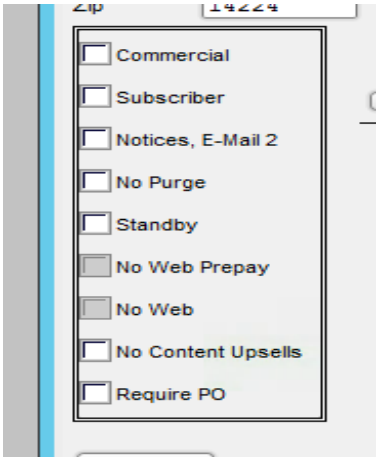
Credit Rating will default to **OKPP** for all new clients. The customer will be required to prepay for ads until clearing the credit approval process.

Once all fields have been completed, save the newly added Customer by clicking **Save Customer Only** from **Ad.Perks** located on the Menu Option. Once the customer has been saved, you may proceed to ad entry.

If you have not populated ALL of the required fields, an error message will appear notating which fields need to be populated in order to save the newly added client. Enter the required fields, and re-click **Save Customer Only.**



Cust Panel Check Boxes



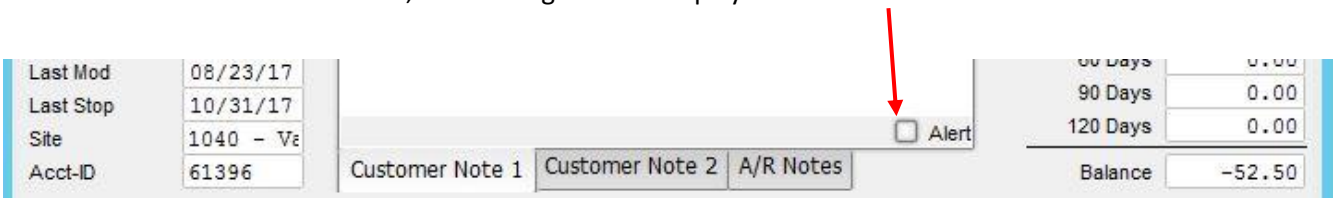
On the CUST panel, there is an area designated at the left edge of the panel for additional information regarding the customer.

1. **Commercial** – see previous page.
2. **Subscriber** – Check this box to indicate that the customer subscribes to your publication.
3. **Notices**, **E-Mail 2**– must be checked if customer should receive notices. (Affidavits)
4. **No Purge** – Check this box to prevent the classified purge utility from ever auto-deleting this customer from the database.
5. **Standby** – Check this box to indicate this is a customer who has standby ads. Standby ads made for standby customers run only if there is no other ad scheduled to be run for the customer on a specified date, in a specified publication. Note that both the customer and the ads must be marked to be eligible to be printed.
6. **No Content Upsell –** prevents emails with links to additional versions of an ad's content being sent
7. **Require PO** – Check this box to indicate that this customer requires a purchase order on each ad before the ad can be saved.

*After appropriately selecting the CUST Panel Check Boxes, make certain to click **Save Customer Only**!*

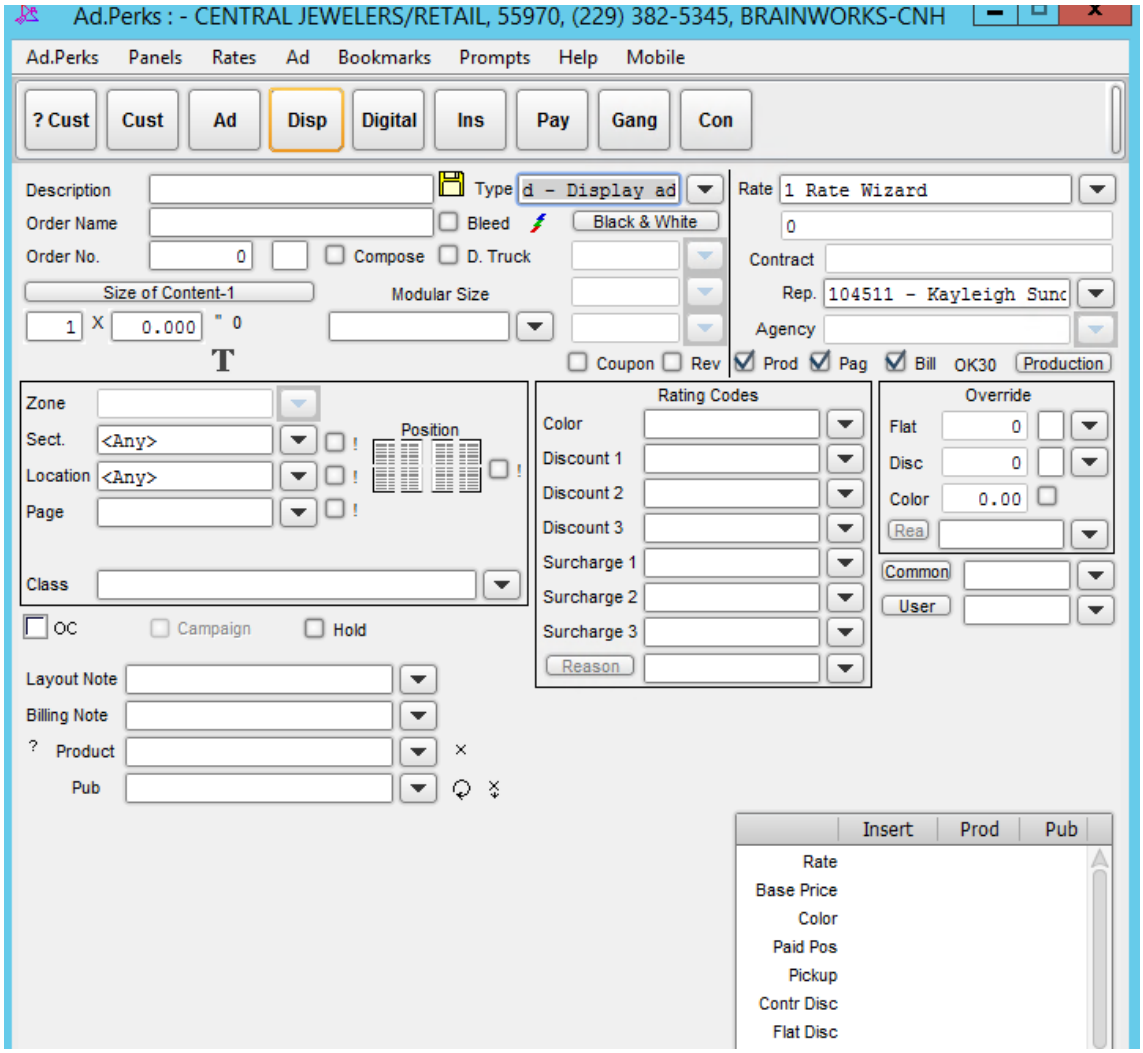
Customer Notes at the bottom of the **CUST** panel – Up to 2 notes may be entered for each customer. Whenever a new ad is being created, any listed notes will be displayed.

- If the Alert box is checked, the message will be displayed in red as a visual alert.



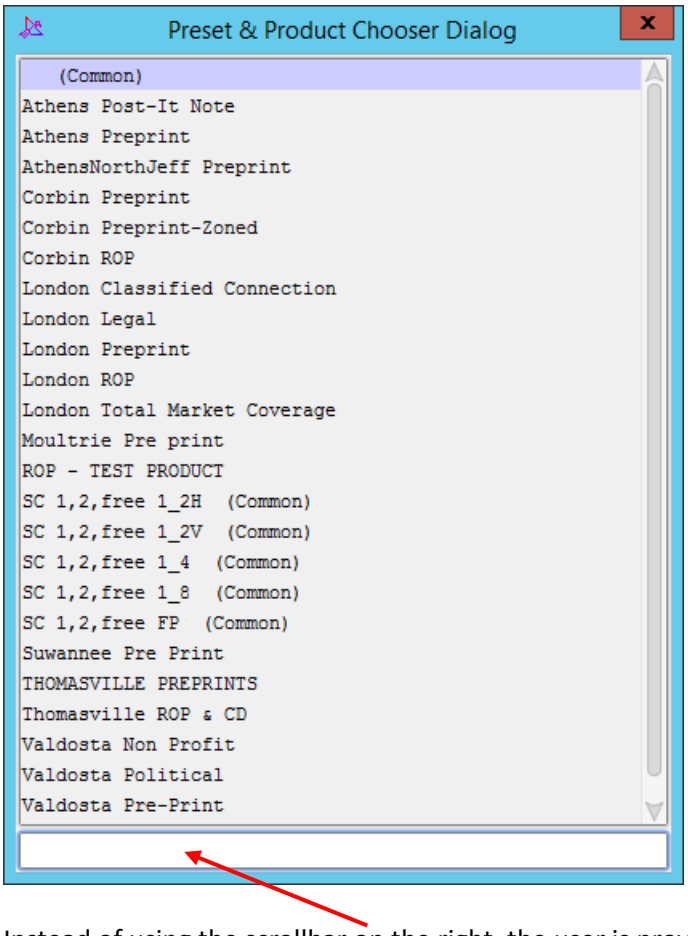
DISP PANEL

The Display Panel is used to schedule display ads. The Tab key moves you from field to field and Shift-Tab moves you from one field to the previous field. Once you have either found an existing customer or created a new customer, navigate to the Display Panel (*F5 only if you set your User preference that you prefer the display panel*).



The first step in creating a Display Ad is to select a **product** from the **Product Chooser**. The Product Chooser provides **presets** and **commons** where rating, scheduling, and certain presets and defaults are stored for products.

1. To access the **Product Chooser**, press **Control E**. The Preset and Product Chooser Dialog will appear:



Instead of using the scrollbar on the right, the user is provided the filtering entry space at the bottom. This list will automatically filter down as you begin to type the key letters/words of the desired product.

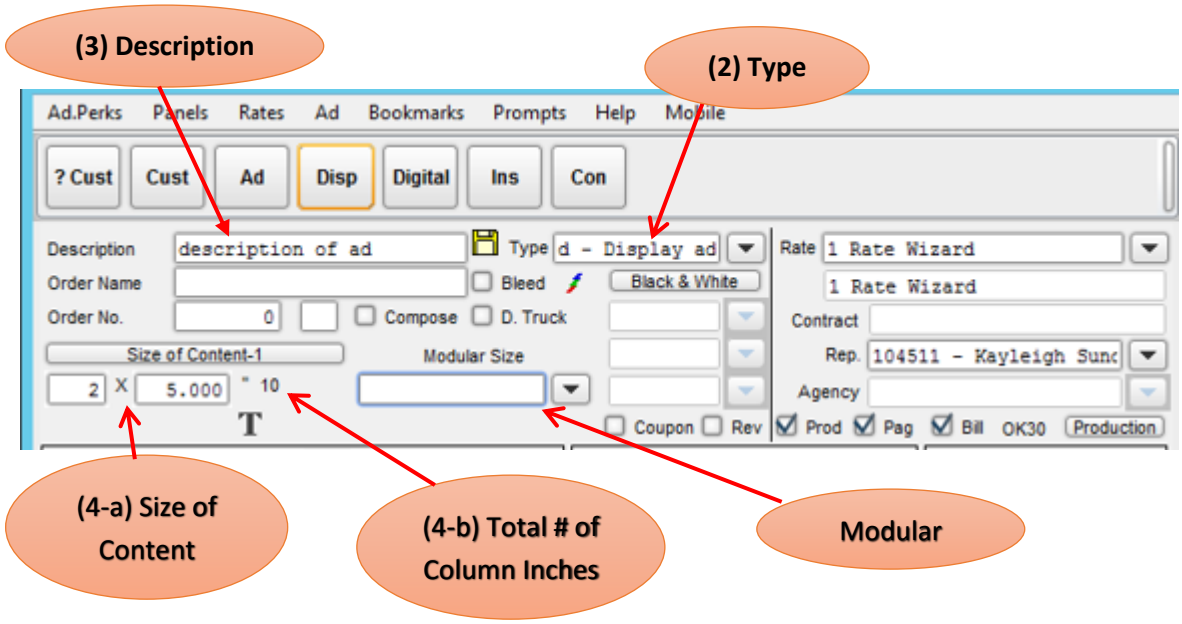
Next, enter the following information:

2. **Type** – Select Ad Type from the dropdown menu. Some of the presets and commons will auto-populate the **Type** for the user upon selection.

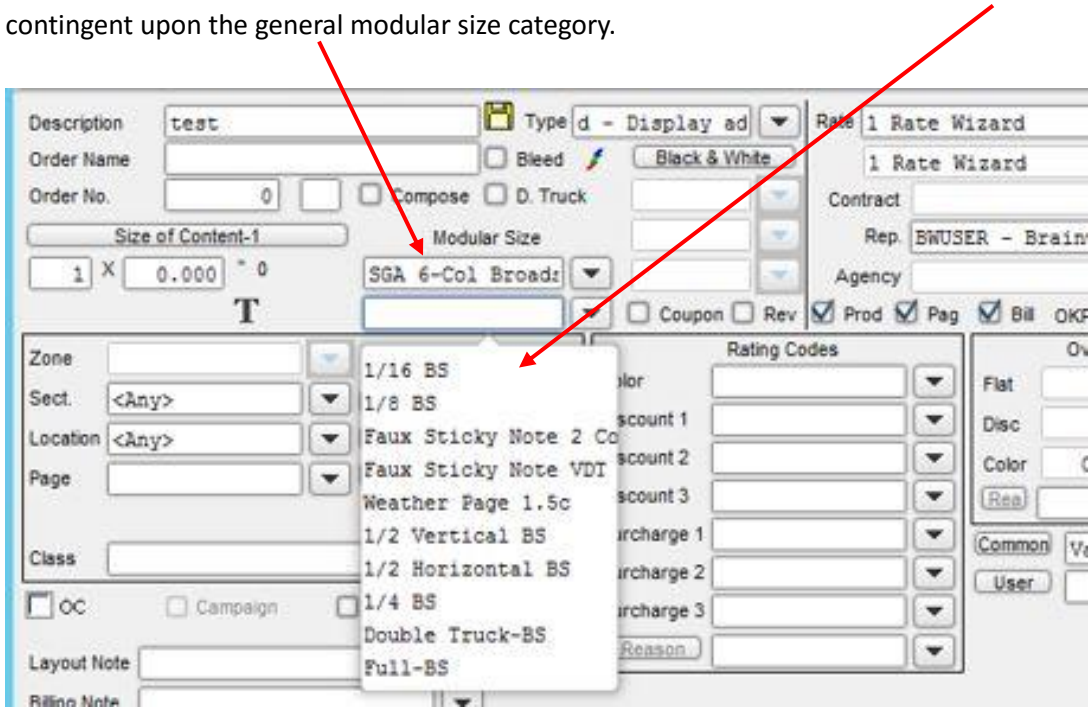
3. **Description** – The description of the ad should be entered and it is a required field. This field defaults into AR as the billing note, unless there is something entered into the Billing Note field.

4. **Size of Content**
   a) Enter the Width in Columns. When typing the number of columns, the field accepts only whole numbers. If the user inputs a number of columns greater than the maximum number of columns available for the selected publication, the input number will automatically change to the maximum number of width in columns available to the publication and the user will be notified by a popup message. *For example, if a selected publication has 6-column pages and you typed 7, the number will change to 6.* An exception to this rule applies with when a Double Truck is selected beforehand. If the **D. Truck checkbox** is selected, you may type a number up to the maximum number of columns on facing pages, such as 18 if there are 9 columns on each page.

b) To the right of the column field is the Height in Inches field, separated by an "x". Partial inches may include up to three decimal places. The number to the right of the height in inches field is the total number of column inches of the ad, which is the automated calculation of columns by inches.



Modular Size – If the ad size is more specific to a Modular Size ad than PCI, the user should then select the appropriate general modular size from the available options by clicking the **Modular Size** dropdown menu. Upon selection, a second modular size field will populate directly under the first with specific modular sizes that are contingent upon the general modular size category.



5. **Color** – Select the appropriate color option by clicking the Black & White button.
   - If the ad is black & white, then leave the button as Black & White
   - For Spot Color, click the button once.
   - For Process Color, click the button twice.

For Spot Color, select the number of colors from the three dropdown menus below the Black & White button.

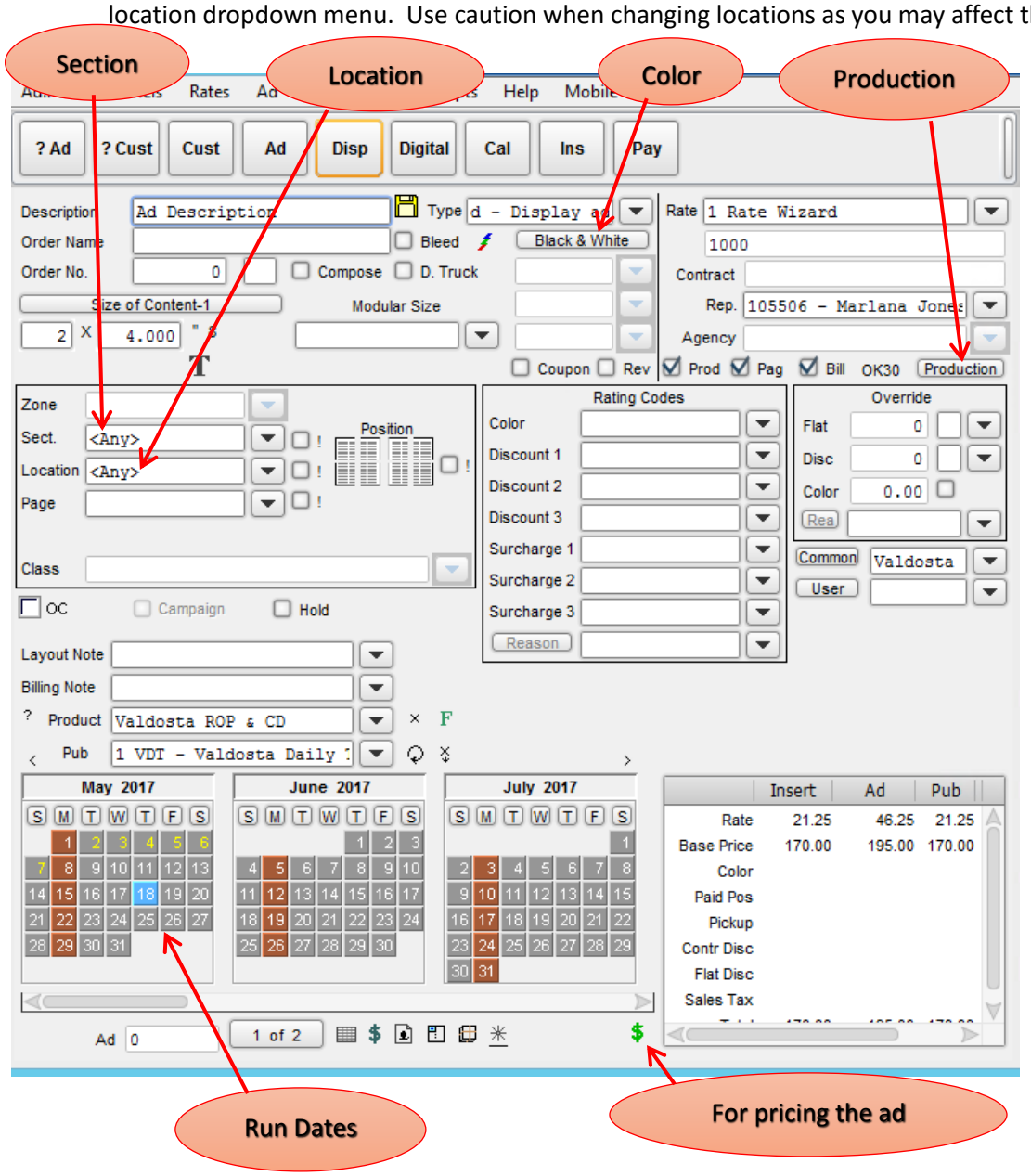
Production (optional) – The Production button is for providing information to Production such as Layout Type and Pickup Type.

Section (optional) – Many products will have the section field populated by presets and commons.

- If a different section is needed than defaulted by the Product preset, select accordingly from the Sect. dropdown menu. Use caution when changing sections as you may affect the rating of the ad.

Location – Many products will have the location field populated by presets.

- If a different Location is needed than defaulted by the Product preset, select accordingly from the location dropdown menu. Use caution when changing locations as you may affect the rating of the ad.



6. **Run Dates** – The user will need to select the Run Dates accordingly from the calendar at the bottom of the screen by clicking the actual date. The date highlighted in blue indicates an insertion.
    - The price of the ad should auto-populate upon selecting Run Dates.
    - If the price does NOT auto-populate, click the green dollar sign below the calendar for pricing.

7. **SAVE** the ad

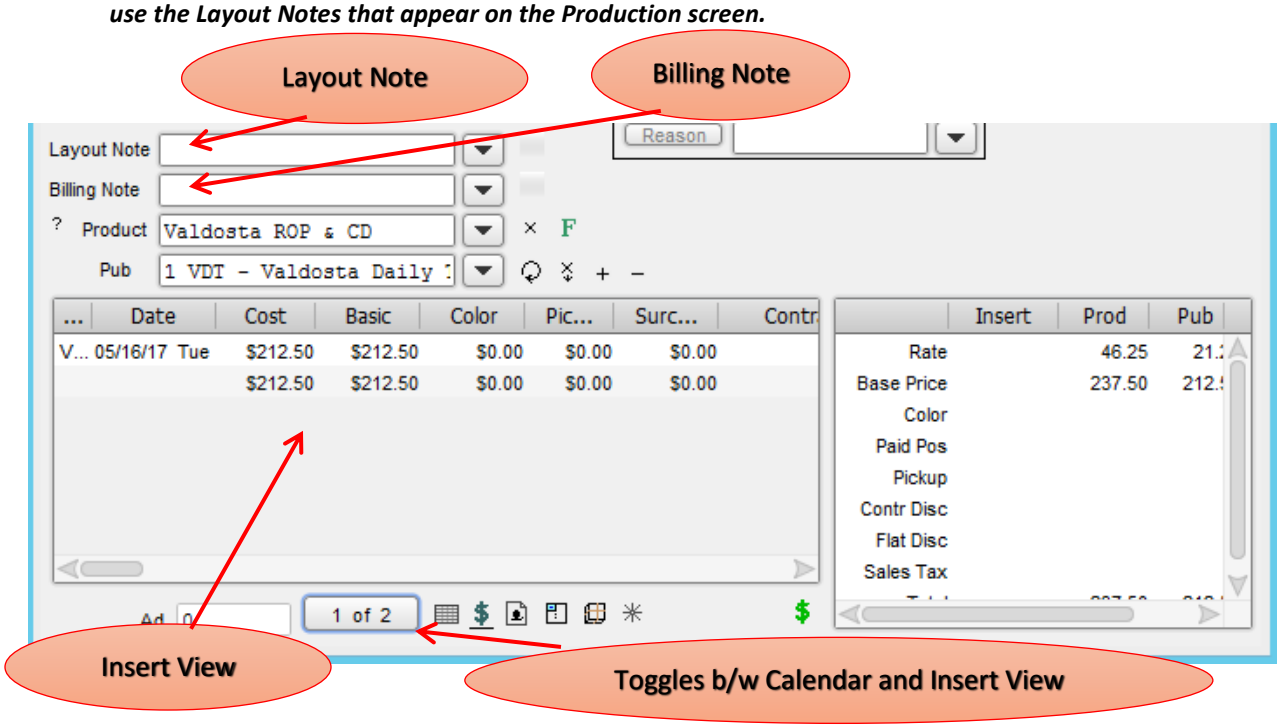
Insert View – The 1 of 2 button below the calendar toggles between the calendar view and the insert view. The insert view will provide details about each insertion.

Six alternate Insert views are available. The six insert icons below the calendar provide the following alternate insert views:

- The first icon displays all the columns that are active at the publication's site.
- The second icon displays cost-related columns.
- The third icon displays contract-related columns.
- The fourth icon displays placement-related columns.
- The fifth icon displays preprint-related columns.
- The sixth icon displays all the columns available, both active and non-active.

Layout Notes – this field is used for any notes needed for pagination.

NOTE: It is very important to use this Layout Notes field if the notes need to be viewed by pagination. DO NOT use the Layout Notes that appear on the Production screen.



Billing Note – If a Billing Note is needed, enter it BEFORE selecting the insertion dates.

Note: If a billing note is needed after the insertion dates have been selected, switch to the Insert View, and highlight each insertion to be updated with the billing note so all inserts are updated.

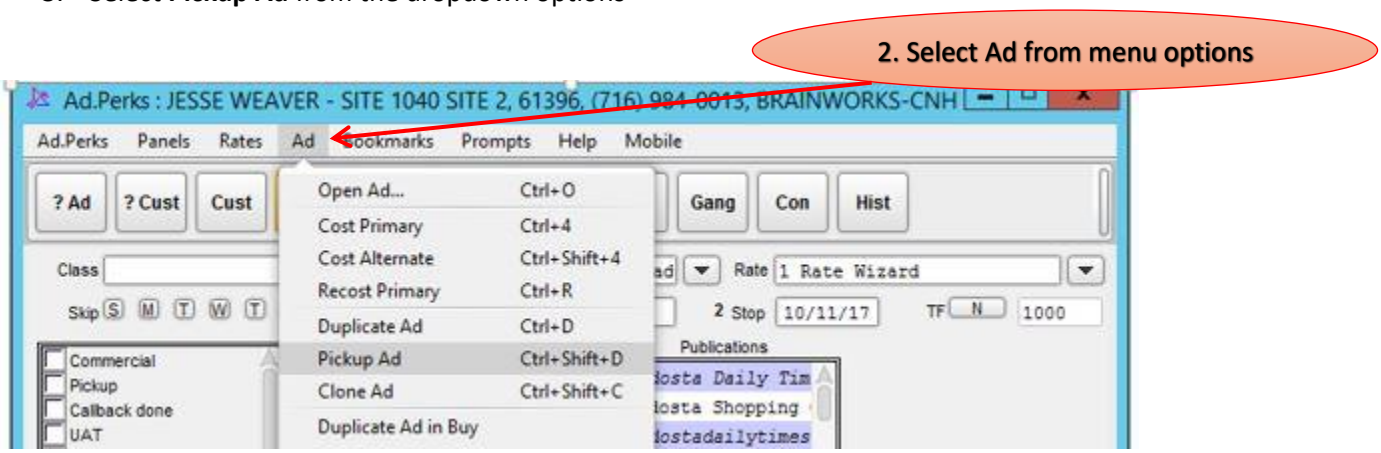
To obtain further information about the scheduled product, click the question mark left of the product field:

Once the ad has been fully entered, save or re-save the ad by clicking the diskette icon near the top of the screen.

Pickup Ads

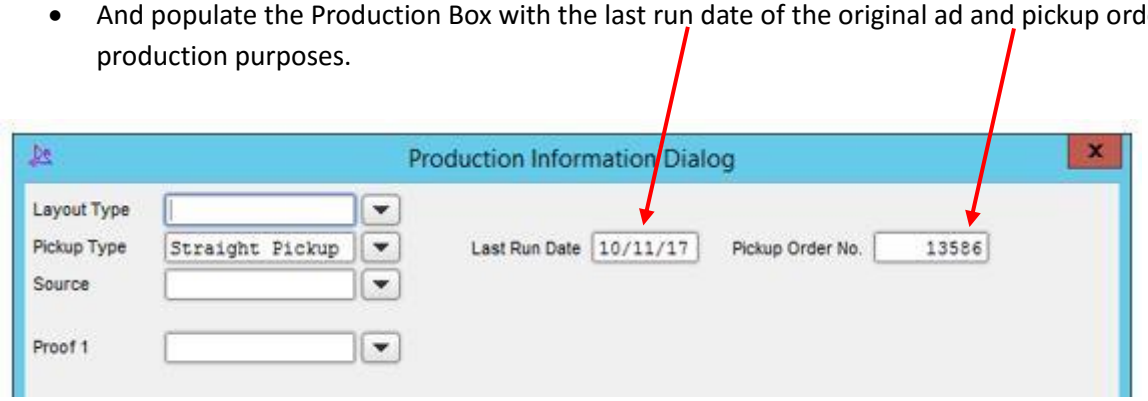
The Pick Up ad option is available for when ad takers place call backs and a customer agrees to run a previously ran ad again.

1. Load the original ad
2. Select **Ad** from the menu options
3. Select **Pickup Ad** from the dropdown options



With the selection of a **Pickup Ad**, Ad.Perks will systematically:

- Create a copy of the existing ad
- And populate the Production Box with the last run date of the original ad and pickup order number for production purposes.



Note: It is very important to the entire ad process that you use this feature if it is truly a pickup ad so the previous ad number and production instructions transfer properly to Xpance.

5. Schedule the Pickup Ad's run dates from the Display panel (Calendar View).

Use the **Production** button for inputting information accordingly that is necessary for Xpance.

6. Select the **Production** button, which will auto-populate the Production Information Dialogue box,
   a. Select a **Layout Type** from the dropdown choices.
   b. Select a **Pickup Type** from the dropdown choices.

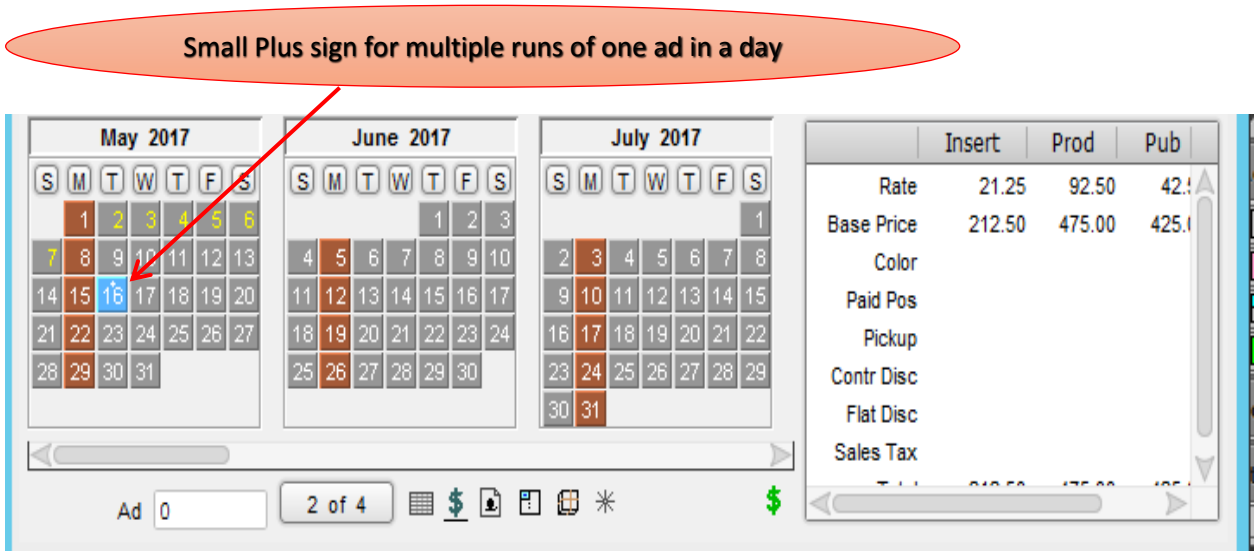
7. **Save** the pickup ad. When the pickup ad is first created in step 4, the ad # is listed as 0. The pickup ad is systematically provided an ad # upon clicking **Save**.

Note: An ad that was previously cancelled can NOT be picked up.

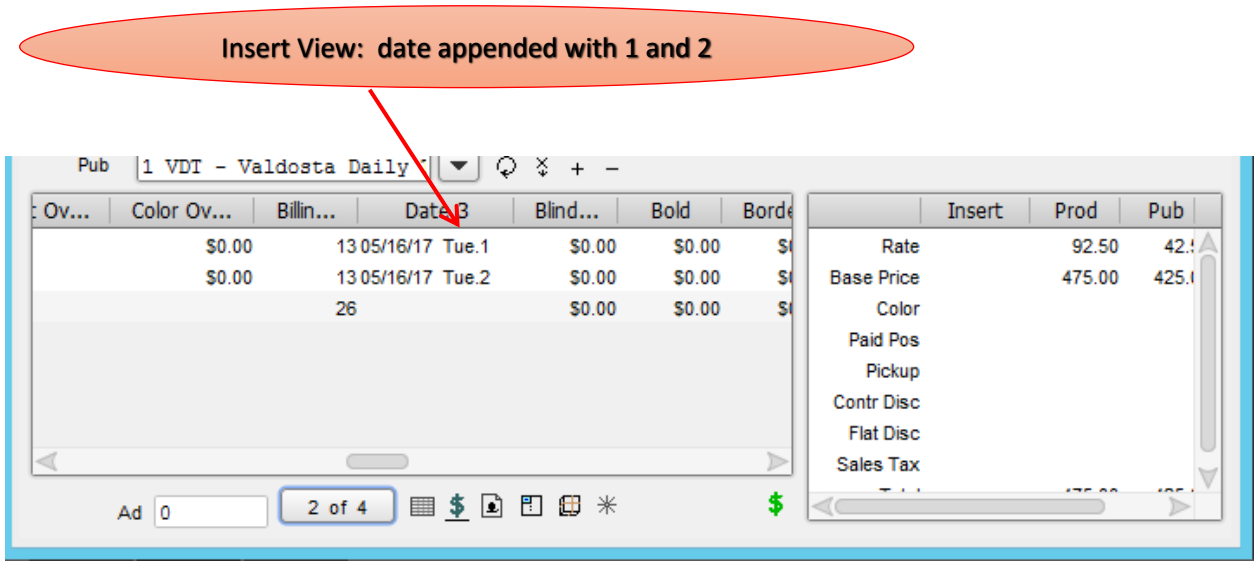
SCATTER ADS/KIN INSERTS

For an ad that runs multiple times in a single day, there is a very specific way of scheduling.

1. Schedule the first run of the ad in the Display panel.
2. If applicable, change Section field accordingly before selecting the insertion date.
3. Hold down the Shift key and click the calendar day an additional time for each ad to be scheduled. The date on the calendar will now have a plus sign on the day where multiple insertions exist.



Insertion View will display the actual insertions and each date that will be appended with 1, 2, 3, etc.



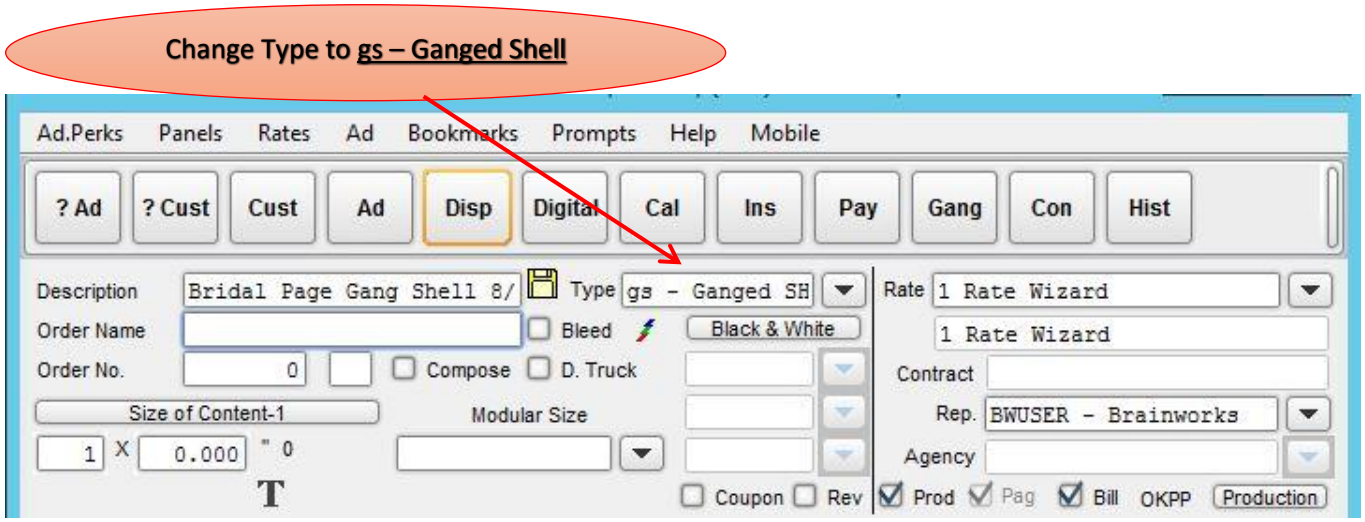
GANG ADS

A gang ad is an ad that is booked with a certain amount of space and then multiple advertisers are billed for the space. A gang ad consists of a ganged shell (space) and ganged members (billed advertisers).

GANGED SHELL - A Gang Shell ad is normally scheduled on a house account.

Ordering a Ganged Shell:

1. Select a **product** (gang **shell**) by control "e".
2. Change the Ad Type from d – Display to **gs** – **ganged shell**.
    a. Make this change BEFORE you click on a date to schedule the ad.
3. Enter the ganged shell **description** appropriately. eg: ***Bridal Page Gang Shell – 8/20/17***
4. Entering the remainder of the order is exactly the same as entering any other ad.



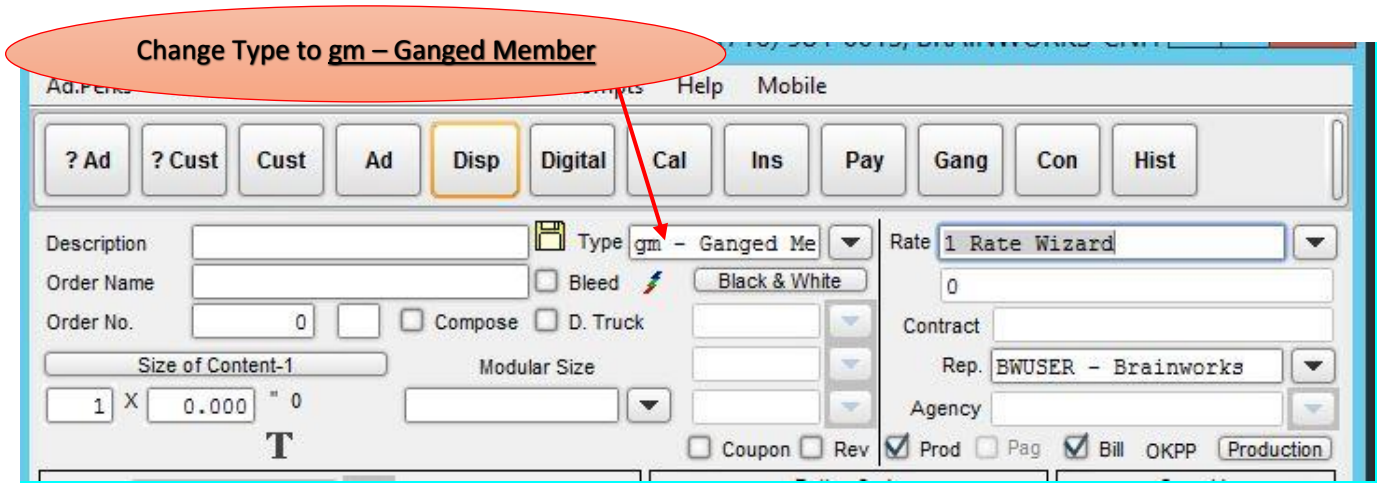
GANG Ads Continued on next page!

GANG MEMBER

Ordering a Gang Member:

1. Select a product (gang **member**) by control "e".
2. Change the Ad Type to **gm** – **ganged member**.
    a. Make this change BEFORE you click on a date to schedule the ad.
3. Entering the remainder of the order is exactly the same as entering any other ad.

Note: It is important that the gang member ads are scheduled for the same days as the shell ad.



BANNER SPACE

Some gang ads will have a banner that runs on the top of them that will need to be sent to production. Order this ad as part of the gang shell.

LINKING GANG MEMBERS TO THE GANG SHELL

The final step in creating a Gang Ad is to link all of the member ads to the shell so that they will flow together for production. The Ganged Member ad links to the Gang Shell because of restrictions in the feed to Xpance.

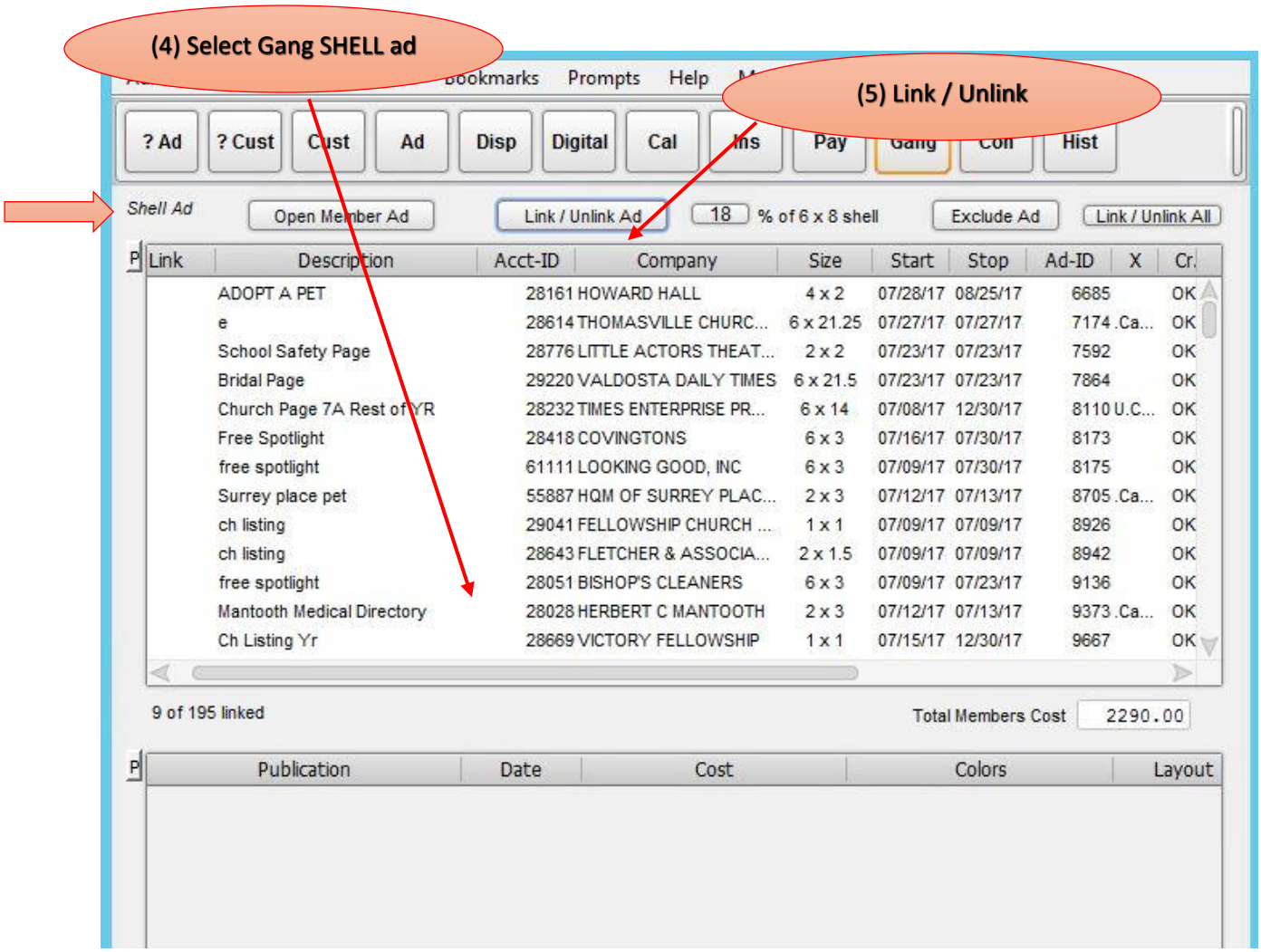
<u>It is important to follow this order:</u>

1. Create the Gang Shell ad.
2. Create the Gang Member ad
3. Navigate to the **Gang** panel

A list of available Gang Shells will appear in the upper half of the Gang panel.

4. Select a Gang Shell ad from the upper half of the Gang panel.
5. Click the **Link / Unlink Ad** button.

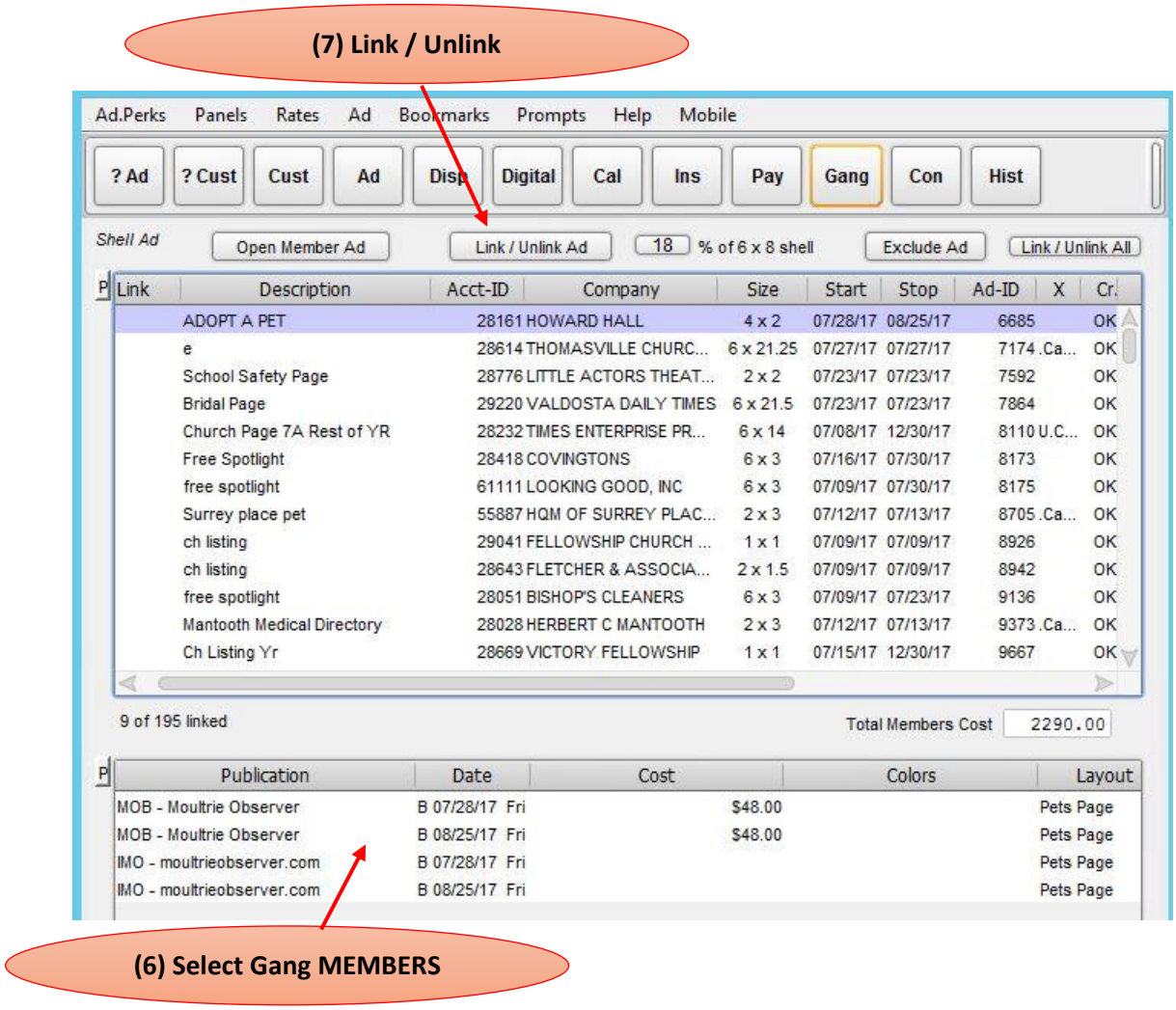
GANG Ads Continued on next page!



Note: There are NO Gang <u>Members</u> available yet in the bottom half of the GANG panel. Once a Gang Shell has been selected (*the row highlights blue)*, then there will be Gang <u>Members</u> available to link to the Shell.

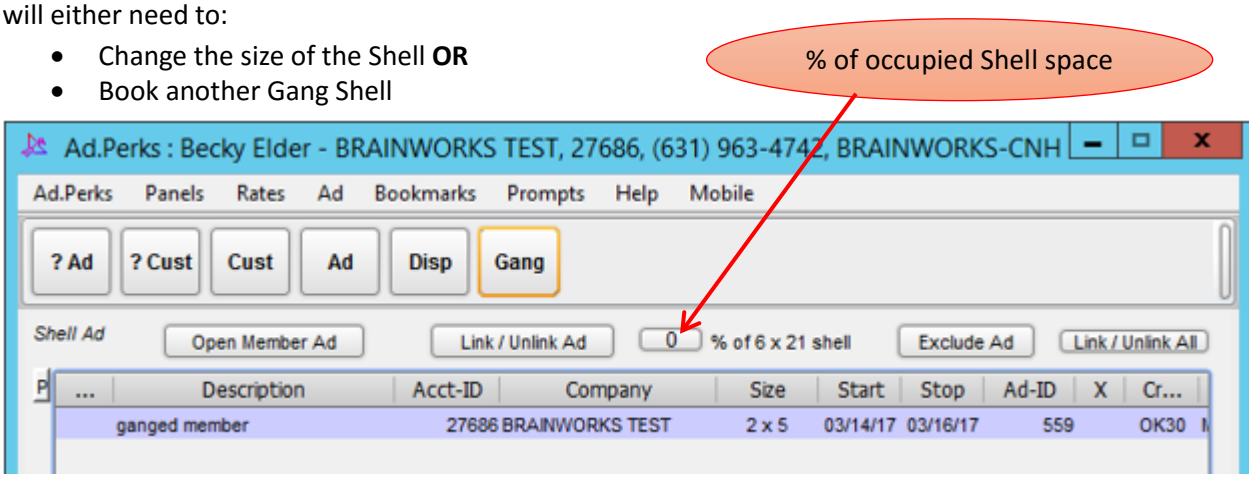
GANG Ads Continued on next page!

6. Select Gang Members accordingly from the lower half of the Gang panel.
7. Click the **Link / Unlink Ad** button a second time.



The percentage of occupied Shell space is displayed the right of the **Link / Unlink Ad** button. Ad.Perks will NOT stop a rep from booking more space than is ordered for the Shell. If a rep exceeds the ordered space, the rep will either need to:

- Change the size of the Shell **OR**
- Book another Gang Shell



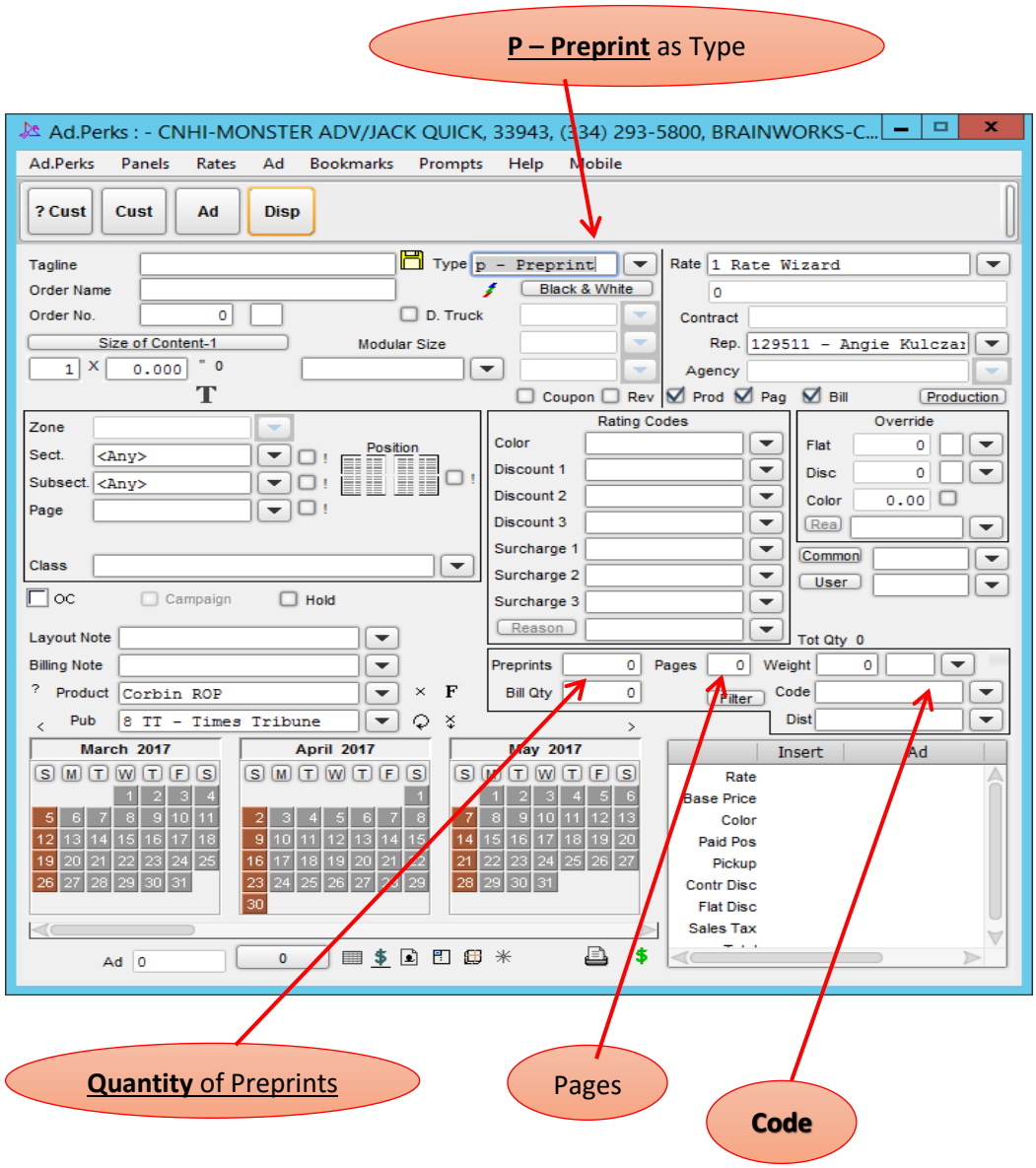
PREPRINT ADS

In the Display panel,

1. Select a preprint product from the product chooser.
2. For ad type, **p - preprint** may auto-populate from the preset.
    a. If it doesn't, then manually select **p – preprint** from the TYPE dropdown menu.

The screen will appear slightly different because the Type selection of Preprint auto-populates additional fields below Rating Codes and Override.

3. Input a Description accordingly.
4. Enter the Quantity of Preprints field, which will auto-populate the **Bill Quantity**.
5. Enter the **Pages** field.
6. Select the **Code** from the available options in **Code** dropdown menu.
7. Select the **RUN DATES**

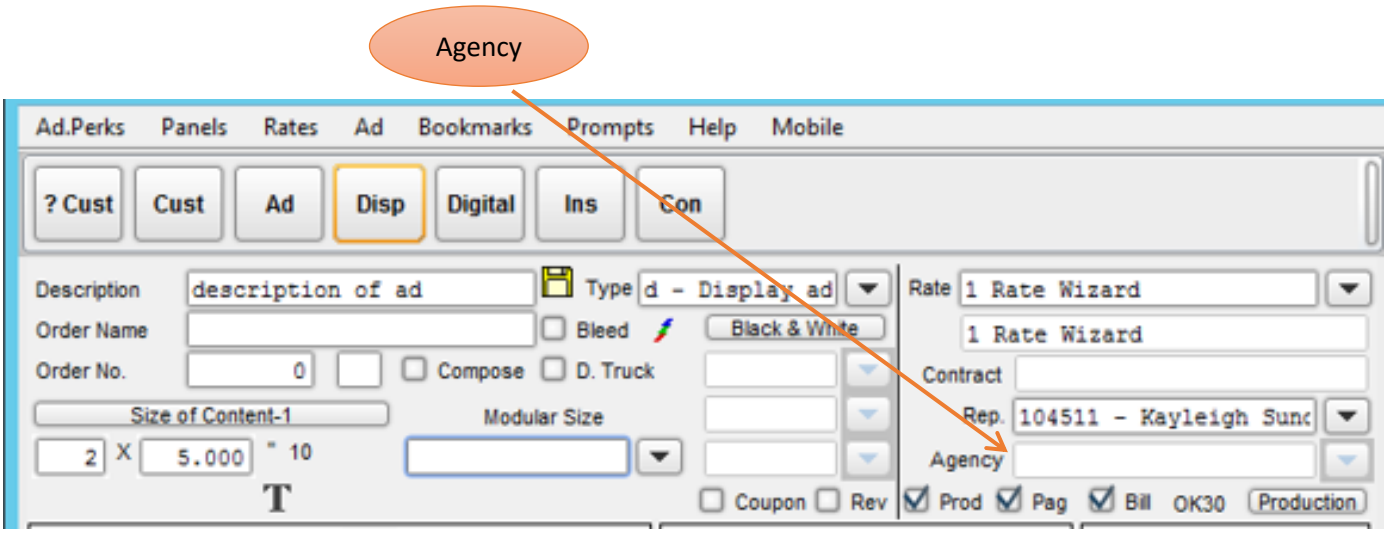


AGENCY/ADVERTISER ADS

In Brainworks, it is NOT possible to schedule an ad directly on an agency account. You must book the ad on an advertiser of an agency. Because Brainworks offers the functionality of multiple agencies tied to a single account, the agency does NOT default into Ad.Perks order entry. However, there is a fail-safe feature to ensure you attach the agency. When attempting to save a fully entered ad, a warning message populates if any agencies are available.

After the warning message has populated, a rep can move forward without attaching an agency by simply by clicking **Save**. If rep desires to attach an agency:

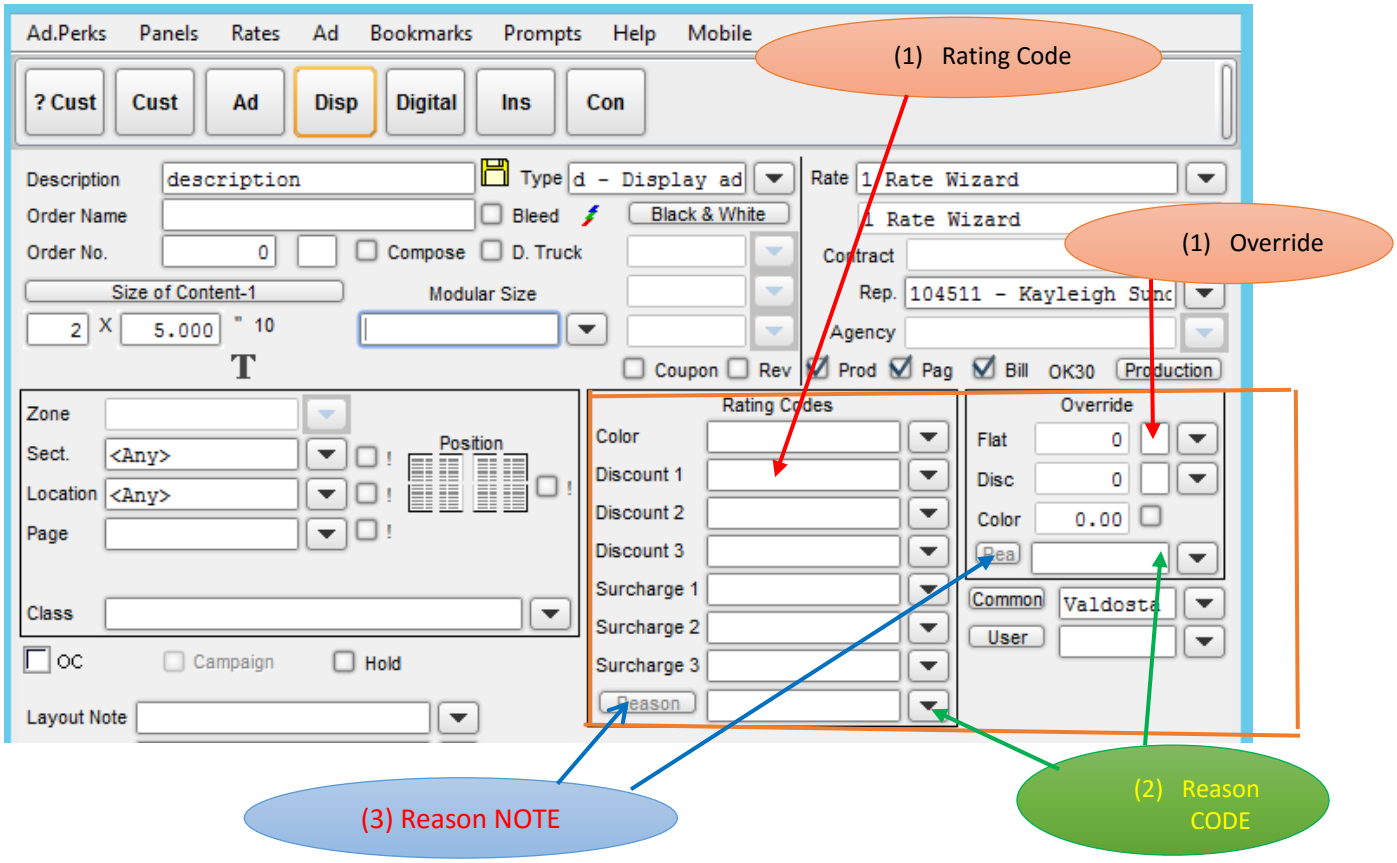
1. Click **Cancel**.
2. Then in the upper right hand corner select an agency from the **Agency** dropdown menu.
3. Save the Ad.



HOW TO APPLY A RATE LEVEL OR OVERRIDE THE COST OF THE AD

It is possible to apply a rate level to an ad, and it is also possible to override the cost per inch, the cost per insertion, add a manual discount dollar amount per inch, per insertion, or apply a percentage. The following is the section of the panel used for both rate levels and overrides.

Rating Codes are used for assigning a preset Discount to the ad for rating.



To apply a preset Discount to the ad, select the dropdown menu from the Discount 1 under **Rating Codes**. The preset Discounts will be subject to management approval.

GENERAL Rules: Every **Rating Code** and **Override** requires that the user supply a Reason Code and sometimes will require a **Reason Note**.

1. Select the **Rating Code** option (Discount 1 field) or select the **Override** option**.**
2. Click the respective Reason Code dropdown menu option and select a Reason Code indicating why the rate was given or the ad was overridden.
3. Next, if a Reason NOTE is required, the reason button turns **red**. You must now click on the Reason button and enter a further explanation of the reason for the override to proceed.
4. **Cost** the ad and click **SAVE**.

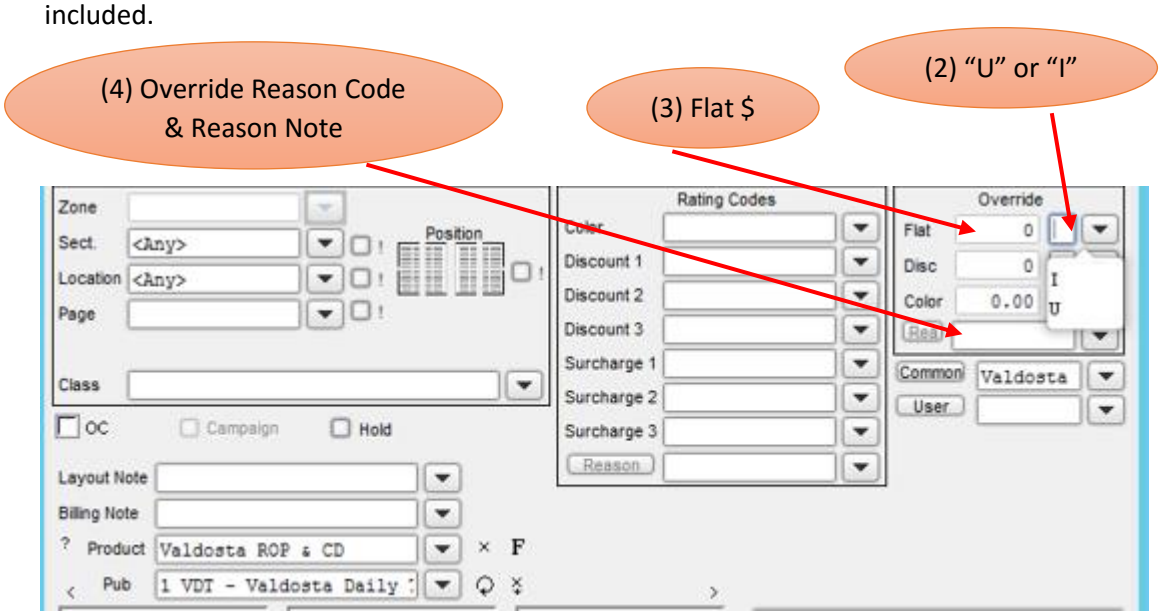
NOTE: Regarding the Discount, if the ad is already scheduled, then un-click the calendar run date. Now input the Discount and then reapply the date.

SPECIFIC Directions in applying an O**verride** to the cost of the basic ad:

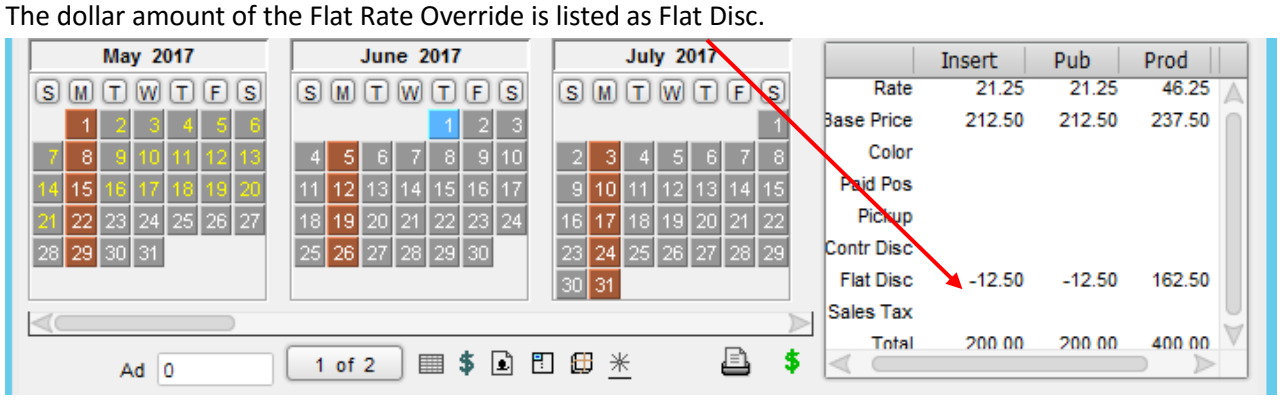
1. Click the dropdown box to the right of Flat field.
2. Select "U" to override by the unit or select "I" to override the entire insertion. As a result, the Flat box is now available for numeric input.
3. Enter the amount per inch or the amount of the insertion into the Flat box.
4. Enter a Reason Code (and Reason Note if applicable).

Important:

- If you enter the amount of the override PRIOR to scheduling the dates, the override will apply automatically when you select the dates.
- If you enter the override amount AFTER the dates have been scheduled, simply unclick the Calendar Date(s) and re-select the Calendar Date(s). This action will quickly re-cost the ad with the Override included.

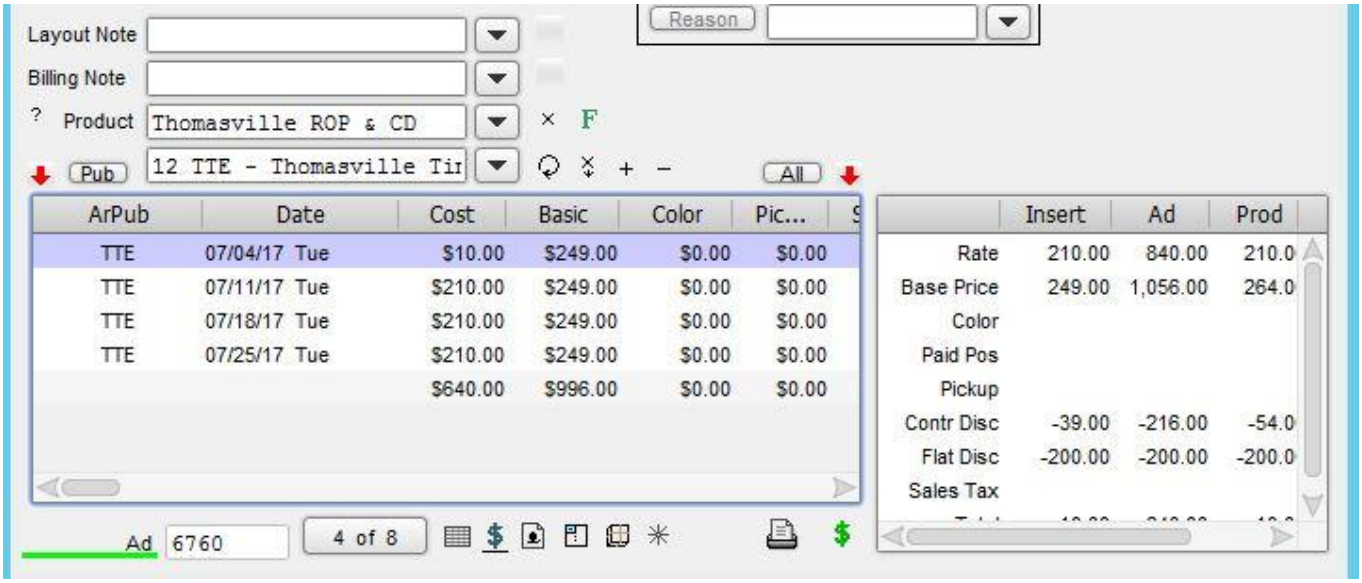


The dollar amount of the Flat Rate Override is listed as Flat Disc.



To apply an O**verride** to the cost of an individual insert of a product/ad:

1. Switch to the **INSERT VIEW** from the Calendar View.
2. Highlight the specific insert(s) that needs to be overridden.
3. Click the dropdown box to the right of Flat field.
4. Select "U" to override by the unit or select "I" to override the entire insertion. As a result, the Flat box is now available for numeric input.
5. Enter the amount per inch or the amount of the insertion into the Flat box.
6. Enter a Reason Code (and Reason Note if applicable).
7. Click a second time on the Highlighted Insert. The Override cost should apply upon clicking.
8. Click the **RED** Arrow to turn off the Override. This is important because anything you click will rate to the override. Therefore, this step is a quick off switch.

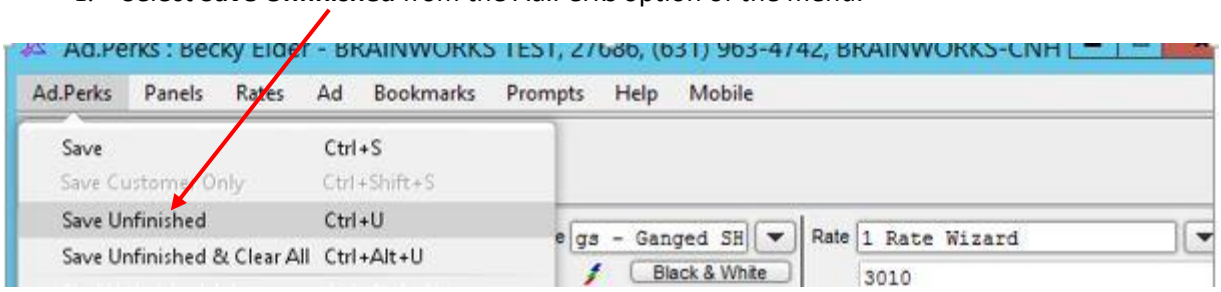


SAVE AD AS UNFINISHED – (red sort bar)

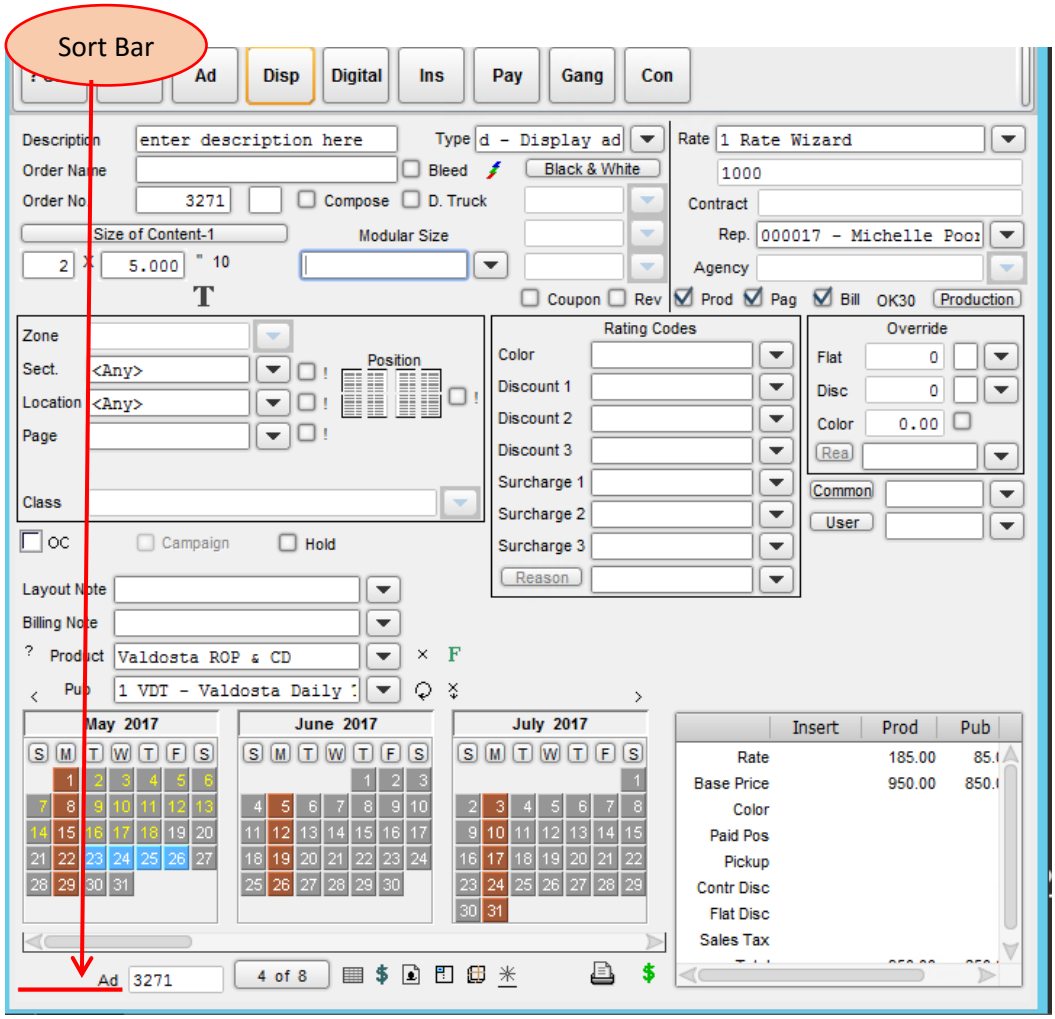
If an ad is NOT ready to be released for publishing, the ad may be placed into an unfinished queue by saving it as **Save Unfinished**.

For an ad that can't be saved ready for publishing, this feature allows for work that the rep has already performed in creating/scheduling an ad to be saved without having to come back and start over from the beginning whenever the rep resumes creating/scheduling the ad.

1. Select **Save Unfinished** from the Ad.Perks option of the menu.



When ad is **Saved Unfinished**, the **Sort Bar** under the Calendar View will turn to **red** and the ad will NOT run until it is re-saved as finished.



SORT BAR COLOR

Green – **Sort OK**: ad is ready to publish.
Yellow – ad is on hold.
Red – **Saved Unfinished** and will not publish until re-saved as finished.
Black – ad is in a blocking queue and will need to be released before the ad will publish.

- "Payment" blocking queue which is most likely for a prepayment that is needed.
- "Credit Failure" blocking queue
- "Rating Discount" blocking queue set up for managerial approval

Gold – a **Cancelled** ad creates a Gold sort bar with a thin black border around it.

PLACING AD on HOLD – (gold sort bar)

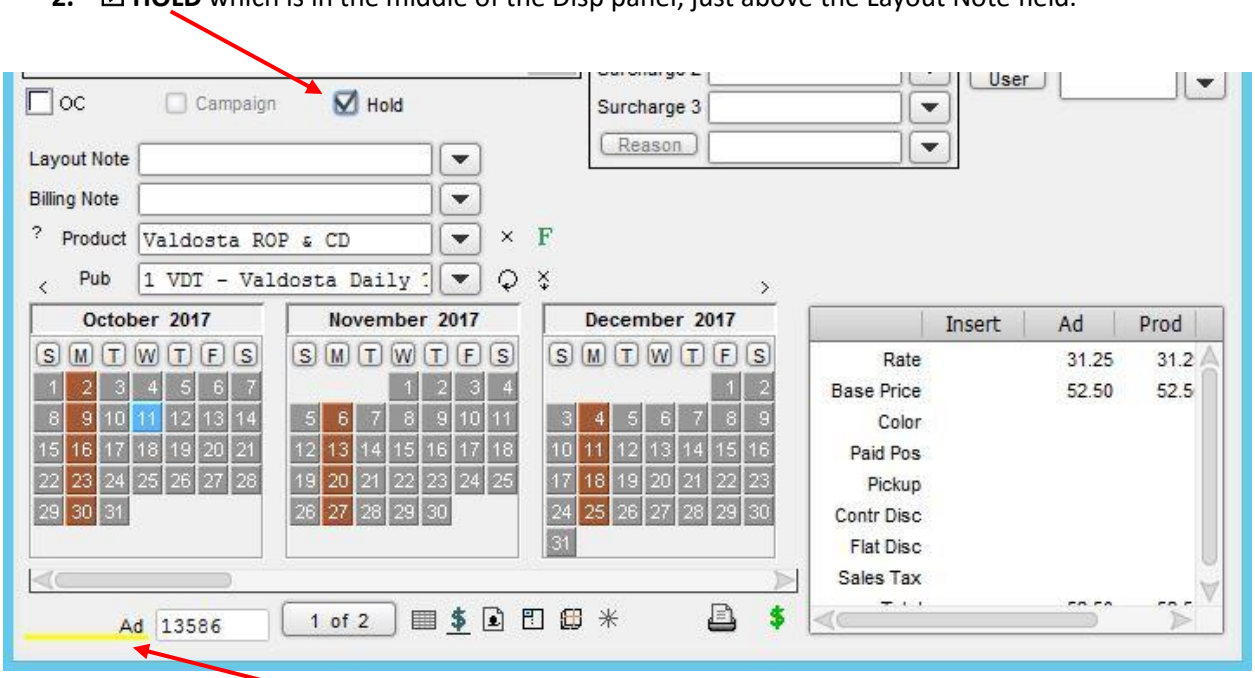
An ad on hold will not be sorted, and thus cannot be included in the galley that is used to place the ads on the page in the pagination process. Placing an ad on **HOLD** is similar to saving an ad as **Save Unfinished** with two exceptions.

- The first exception is for the reason in using the **HOLD** feature, which is because a payment was taken by the rep.
- The second difference is that applying and removing a **HOLD** is always performed manually whereas **Save Unfinished** can be applied both manually and systematically.

A report can be ran in identifying what is on **HOLD**.

To place an ad on **HOLD**:

1. With the desired ad open, navigate to the Disp panel
2. ☑ **HOLD** which is in the middle of the Disp panel, just above the Layout Note field.



Notice that the Sort Bar became **YELLOW** upon ☑ **HOLD**.

SAVING AN AD

After inputting an ad completely in the **Ad** panel:

1. Click on **Ad.Perks** on the task menu.
2. Then select **Save**.

You also may click **ONCE** on the Save icon, a yellow diskette. However, d**o not double-click on this icon**! This icon is a visual warning that changes have been made to the ad since it last was saved, and these changes have not yet been saved.

If you start a **Clear Ad & Buy** or **Clear All** procedure, or begin to exit from Ad.Perks without having saved changes made in the Ad panel, you will be prompted to save the changes. If you do not, the changes will be lost.

If you save an ad for a customer whose credit is OK, but the text of the ad includes a phone number for a customer whose credit is anything other than OK, you will see a **Confirm** dialog box:

If you click on View Customer(s), you will be switched to the Customer panel, where you will see a list of the customer(s) with credit other than OK whose phone number is contained in the text of ad:

You may then call the ad up again and save it, or ask the customer for a phone number that does not have credit other than OK.

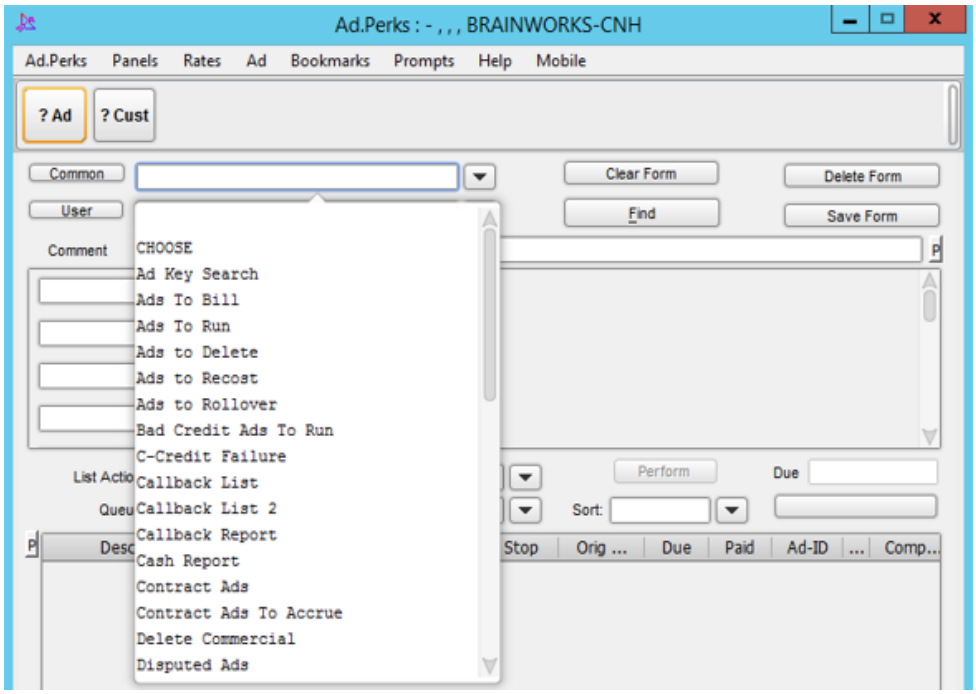
Note that if you type a seven-digit phone number in the text of the ad, and there are multiple customers in the database with this seven-digit number but different area codes, you will see the Confirm dialog box if ANY of the customers have credit other than OK.

FIND AD PANEL

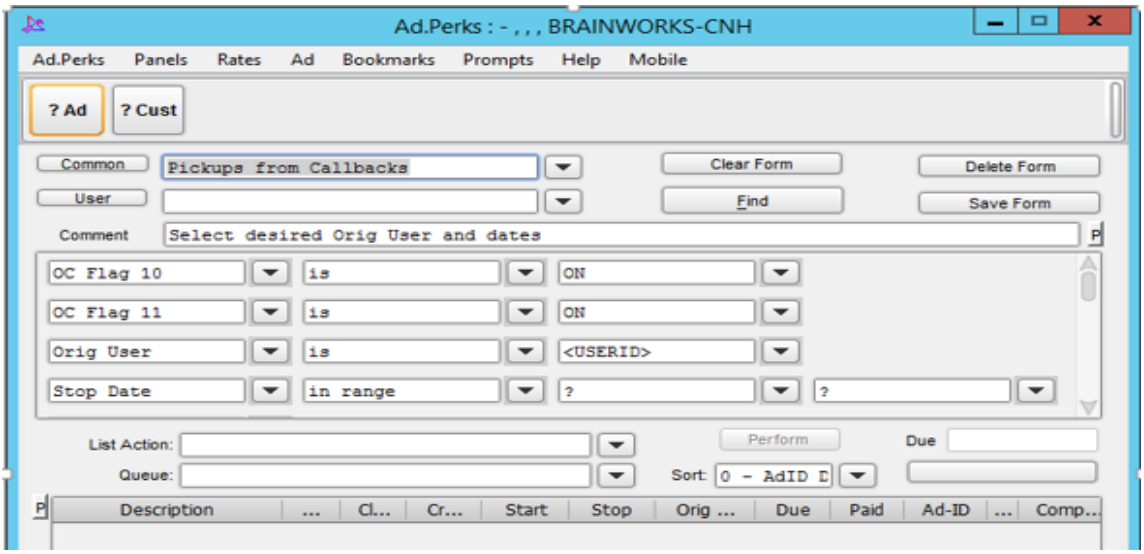
The purpose of this panel is to use a wide variety of criteria to search for ads in Ad.Perks. You may create an ad hoc query, save that ad hoc query, or use a Common query previously created.

Frequently used searches are saved for everyone to use. To access these queries:

1 Select from the Common dropdown box.

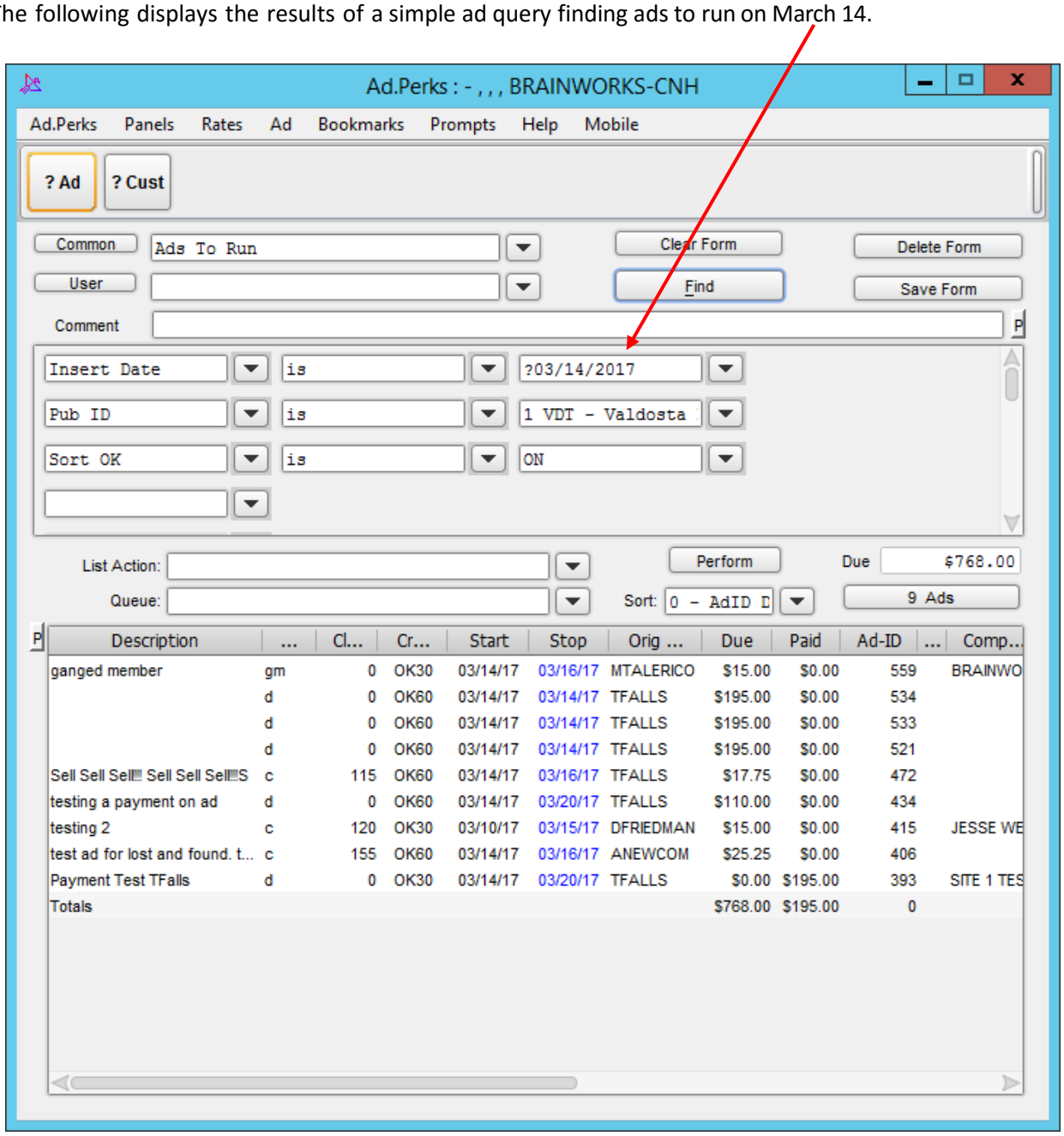


Select the query, then click **Find**. Once you select a common query, the information that is being searched for will come up in the box before you click find.



The results of the query will appear in the bottom half of the screen.

The following displays the results of a simple ad query finding ads to run on March 14.



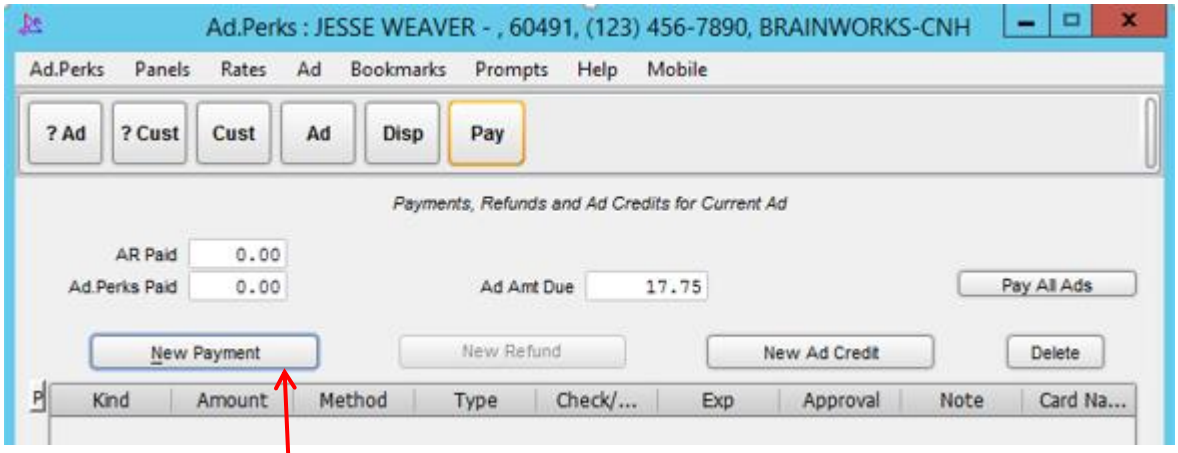
You may sort on any of the columns by simply clicking on the heading. You may also print out the results. See the section later in this manual to Print Windows in Ad.Perks.

To create your own query, see details in the Brainworks Classified and Classified Display Manual for Users Part A starting on page 19. This will provide you with the guidance to create your own reports.

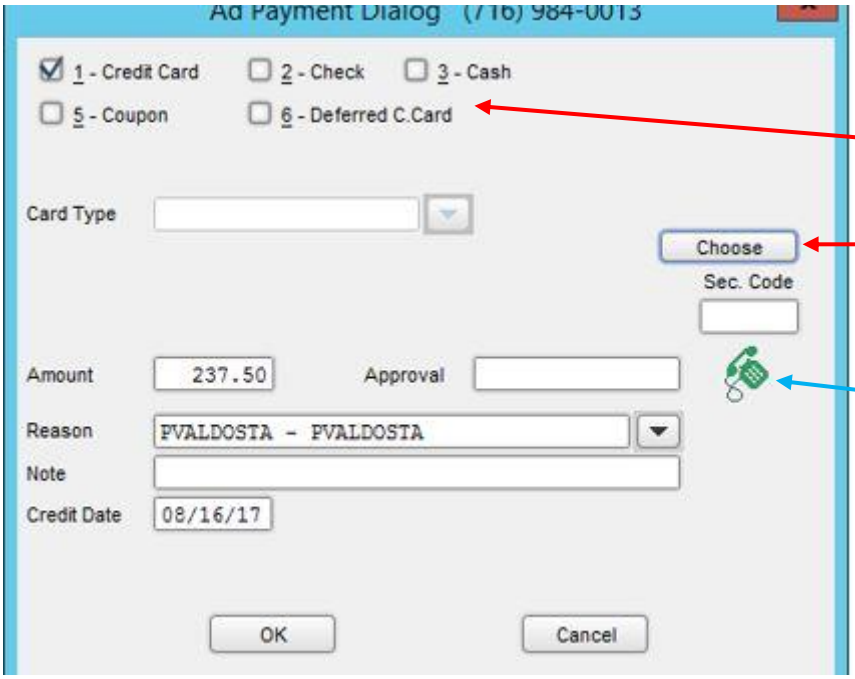
Once you are finished with a query, Click **Clear Form** to start a new query. You may also have your own queries by clicking **Save Form**.

PAYMENTS

Once you have completed ad entry and saved the ad, you may then apply a payment to the ad. To access the Pay Panel, either click on Pay tab or press F9. The following panel with appear:



1. Click on **New Payment** button which will populate the Ad Payment Dialog box.



2. Select Payment Type

6. Authorize C.C. payment

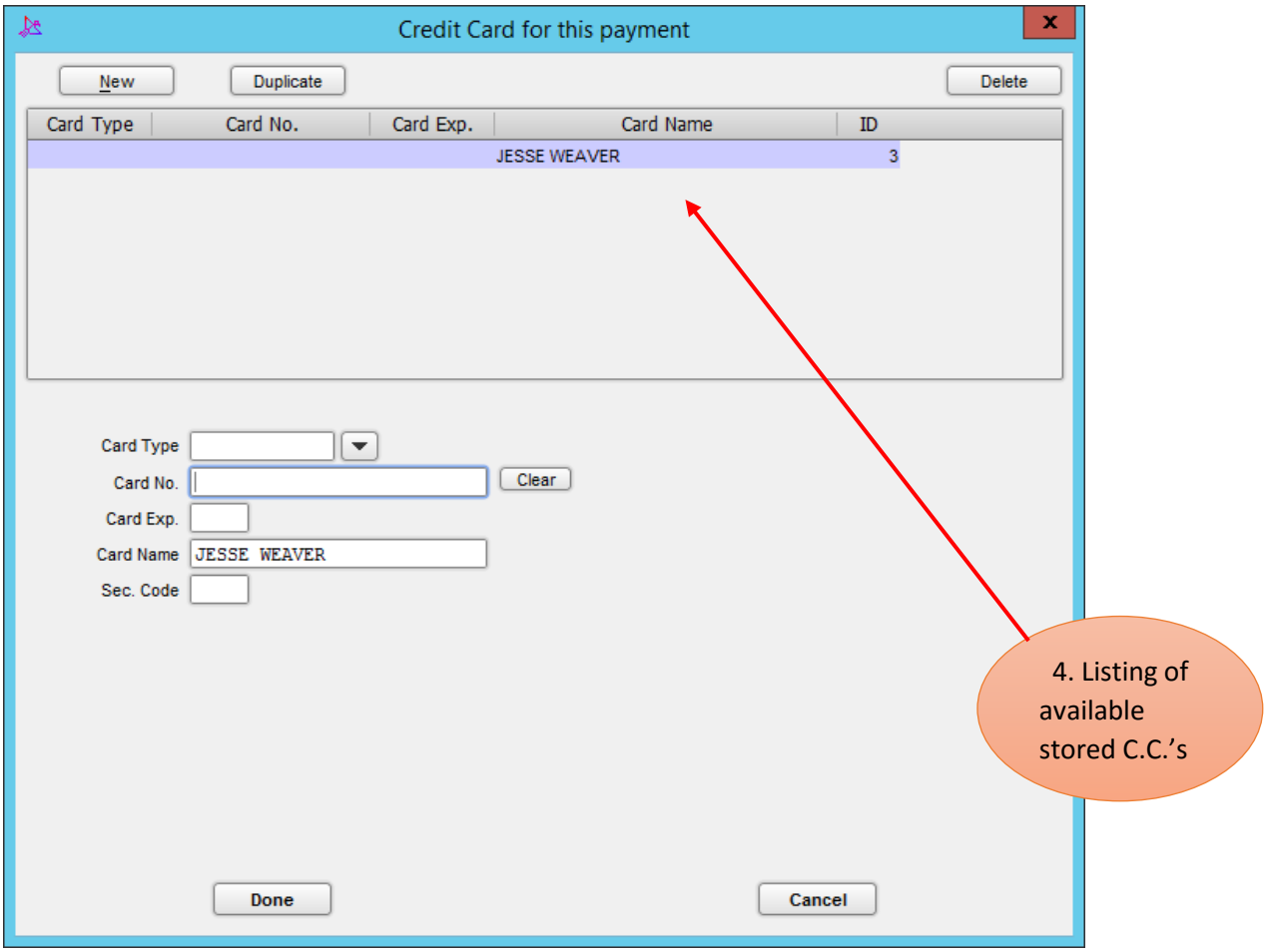
3. **Choose** button

2. ☑ The **Payment Type** that you wish to use.

For this example, the Credit Card payment type will be demonstrated.

If you select Credit Card as the Payment Type (step 2) then:

3. Click on the **Choose** button, and the Credit Card for this payment box will auto-populate:



4. Enter the Card Type, Card No, Card Exp., Card Name, and Sec. Code:
   - Either by manually imputing the information directly into the fields
   - Or by making a selection from the listing of available stored credit cards which will auto-populate the information fields

If a credit card is being manually entered into the fields, an option will populate allowing the rep the ability to retain the manually entered credit card on the customer's account by clicking **Remember** button. If there is already an existing credit card in the listing of available stored credit cards, an option to designate this credit card as **Primary** will be available.

5. Once the credit card information is either manually entered or auto-populated by selection from a list of available credit cards, then click **Done**. You will be returned to the Ad Payment Dialog box.

6. In the Ad Payment Dialog box, if satisfied with the existing information, click the **Telephone icon** to authorize the credit card. *This actions communicates with Paytrace for approval or a credit declined.*

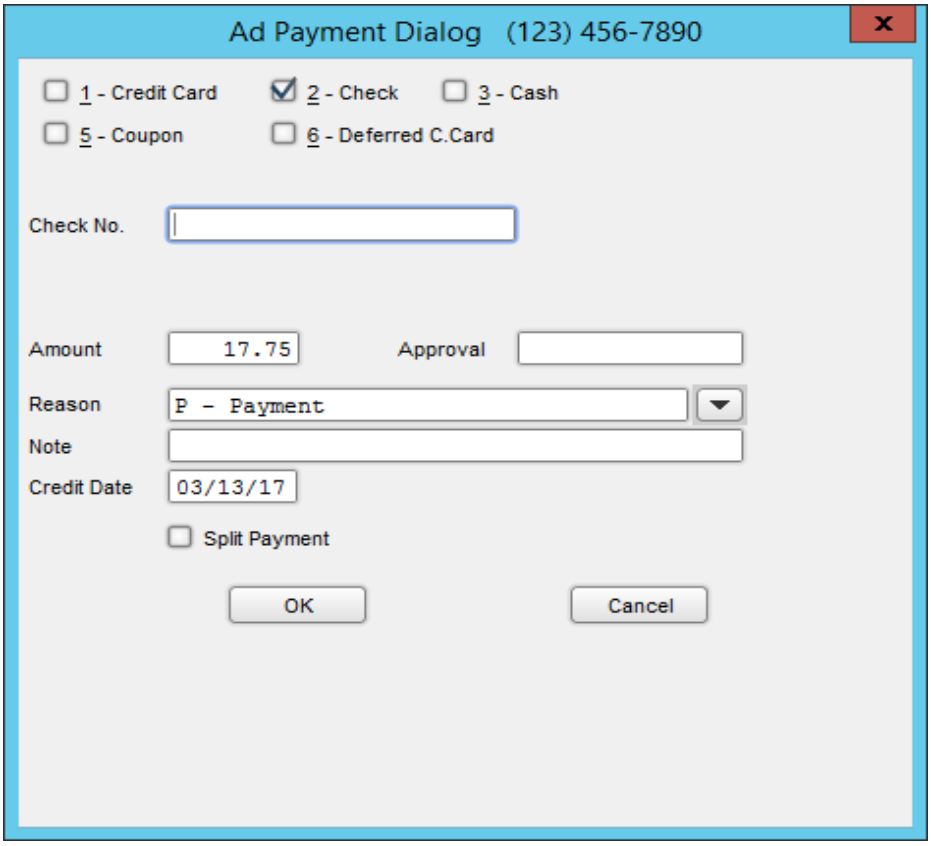
Note: this is very important! You MUST authorize the payment and ensure that there is a valid code in the approval field before you save the ad.

Once approved, there will be a number in the **Approval** field.

7. You may then click **OK**.
8. Re-**Save** the ad. You must re-save the ad after payment has been applied!

For the 2nd example, a Check payment type will be demonstrated
As in the 1st example for the Credit Card payment type, the 1st two steps are exactly the same:

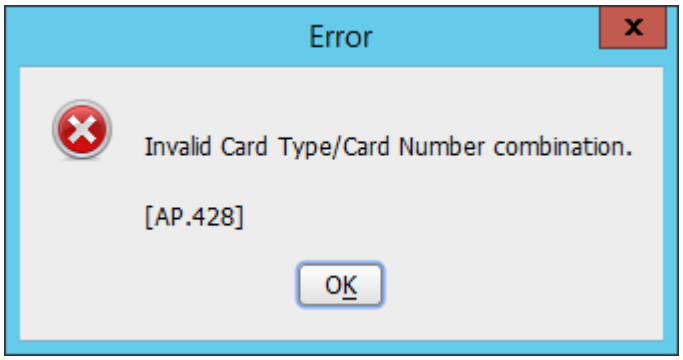
1. Click on **New Payment** button which will populate the Ad Payment Dialog box.
2. From the Ad Payment Dialog box, ☑ The **Payment Type** that you wish to use.
3. Enter a **Check No**.
4. For the **Approval** field, type the name of the person who accepted the check
5. Enter the **Amount**
6. A **Reason** code will most likely auto-populate from the dropdown selector.
7. The **Note** field is optional. For Split Payments, The **Note** field is an ideal place to provide the total amount received.
8. The **Credit Date** will most likely be provided.



IMPORTANT: You MUST save the ad after a payment is applied or that the payment will be lost. If you forgot to save the ad AGAIN after the payment you will be prompted to either Save, Discard, or Cancel. Be sure to save the ad at this point.

DECLINED CREDIT CARDS

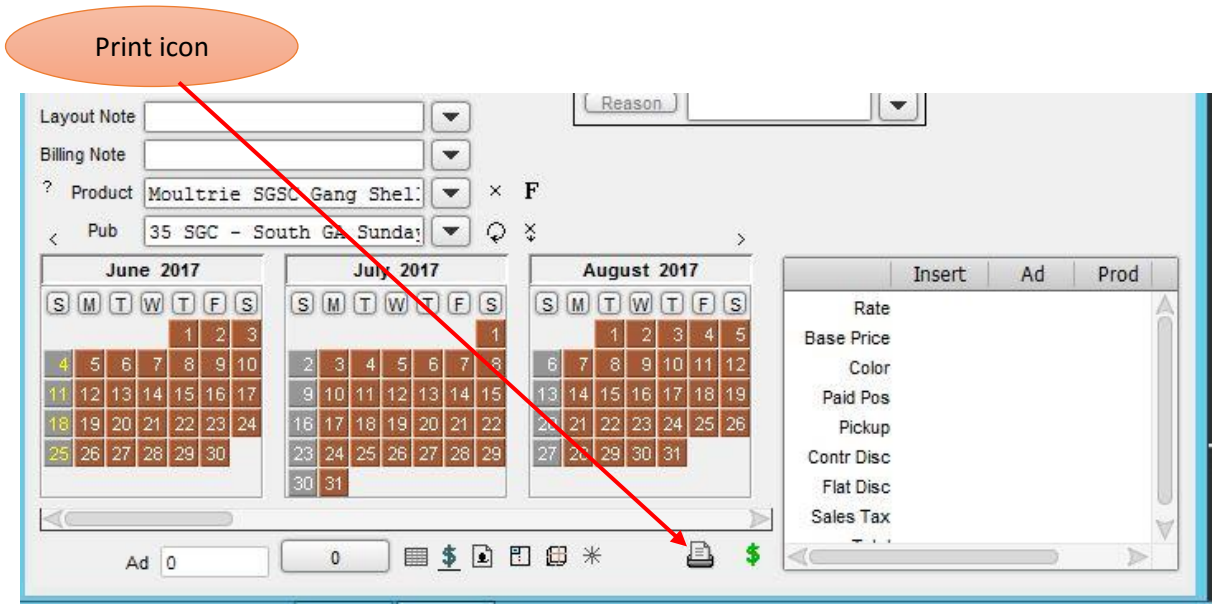
If the credit card you are trying to process is not authorized, the following message will appear. Click **OK** and when you are returned to the credit card window, click **Done.**



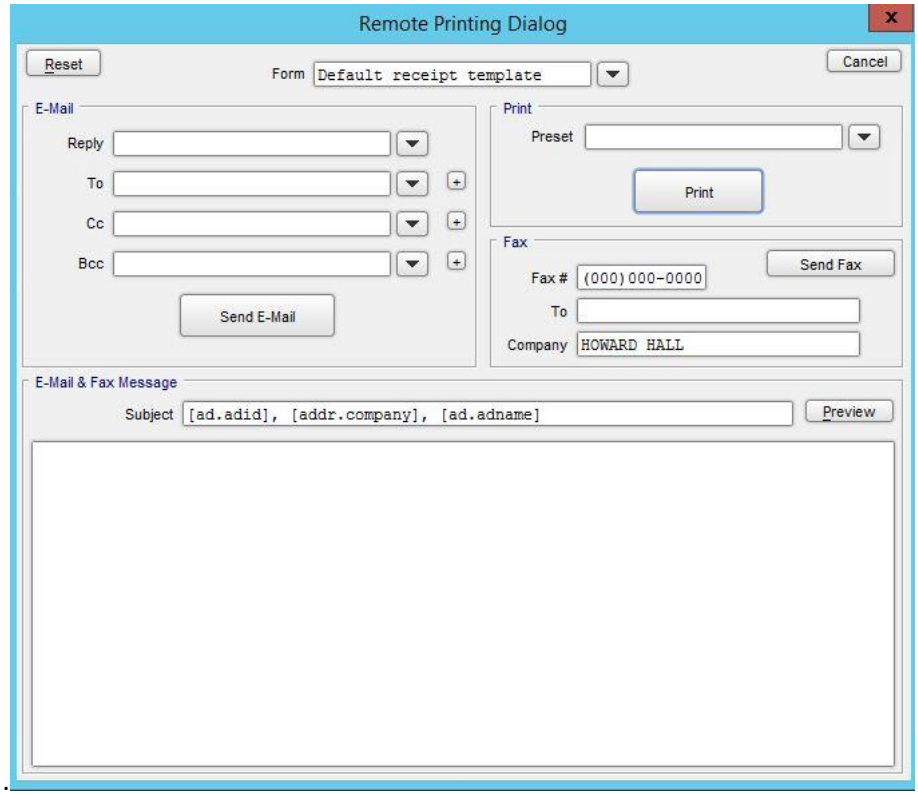
Next, the following box will appear. It is critical that you click "Discard Payment Changes" so that the declined payment is removed. Be sure the payment disappears after clicking this button.

PRINT A RECEIPT

At the bottom of the Display panel, there is a print icon in order to print receipts accordingly.



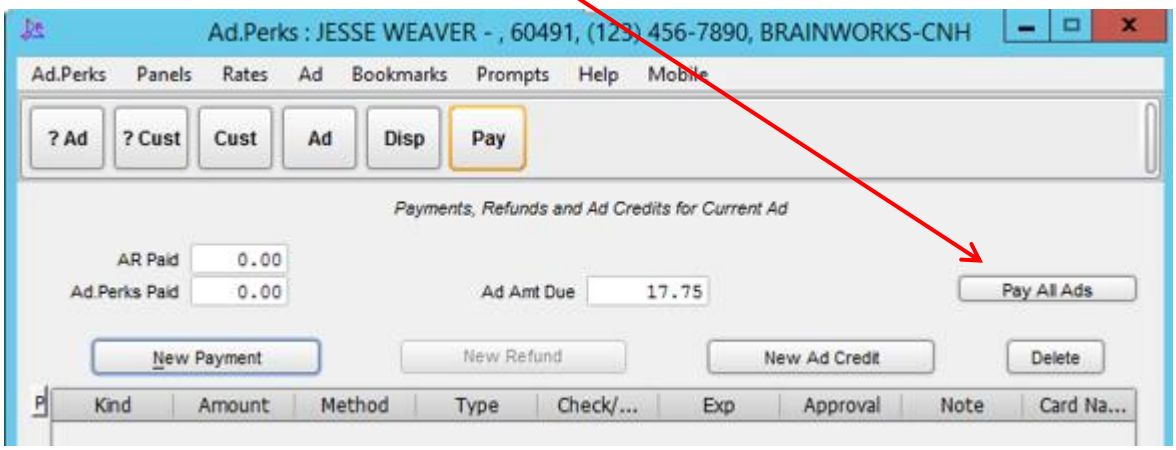
Clicking the icon will populate the following Remote Printing Dialog box. Simply use the email "To" and "Reply" accordingly.



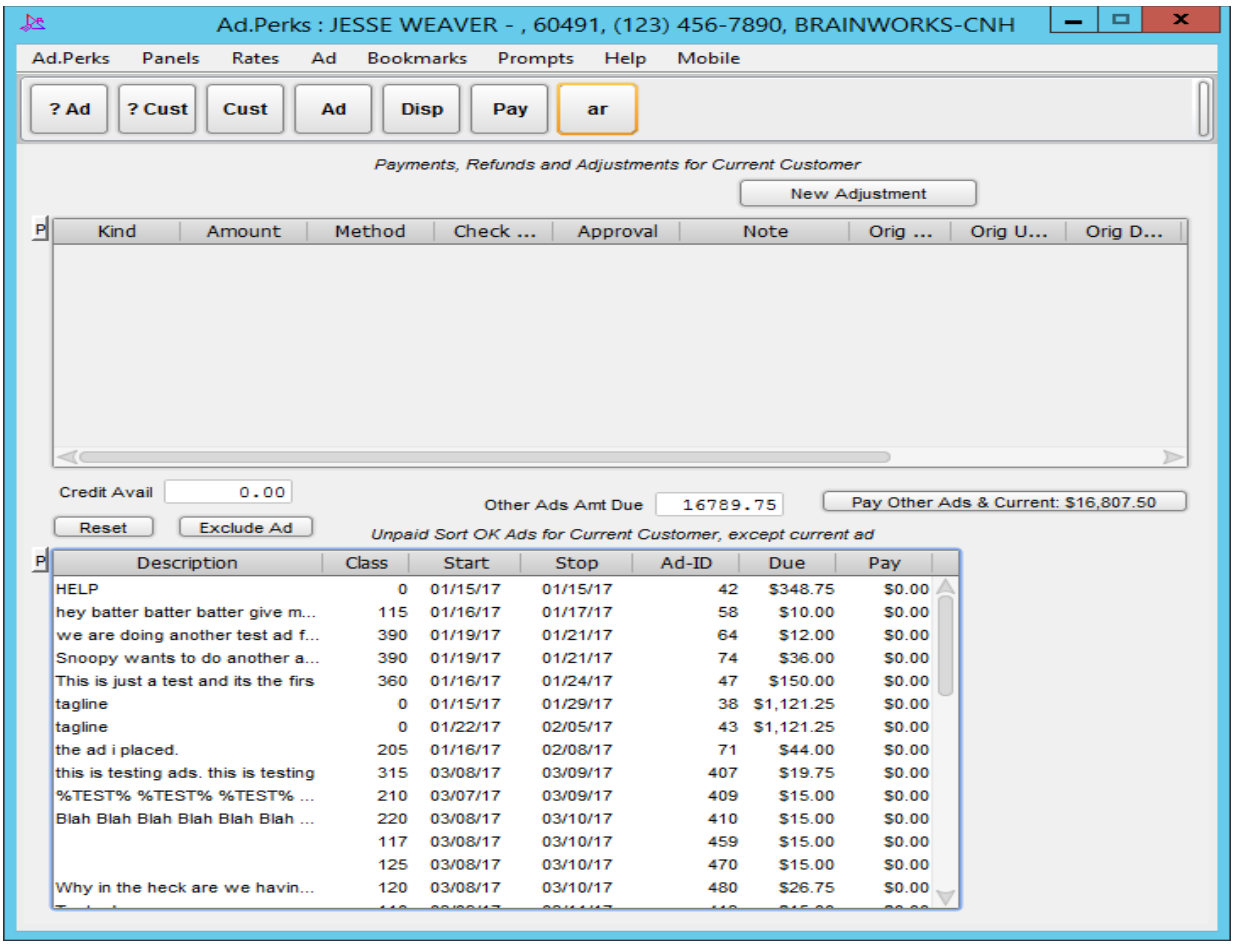
PAYING MULTIPLE ADS

The following describes the procedure if the customer wants to apply a payment for more than one ad with a single payment.

- On the **Pay** panel, click **Pay All Ads.**



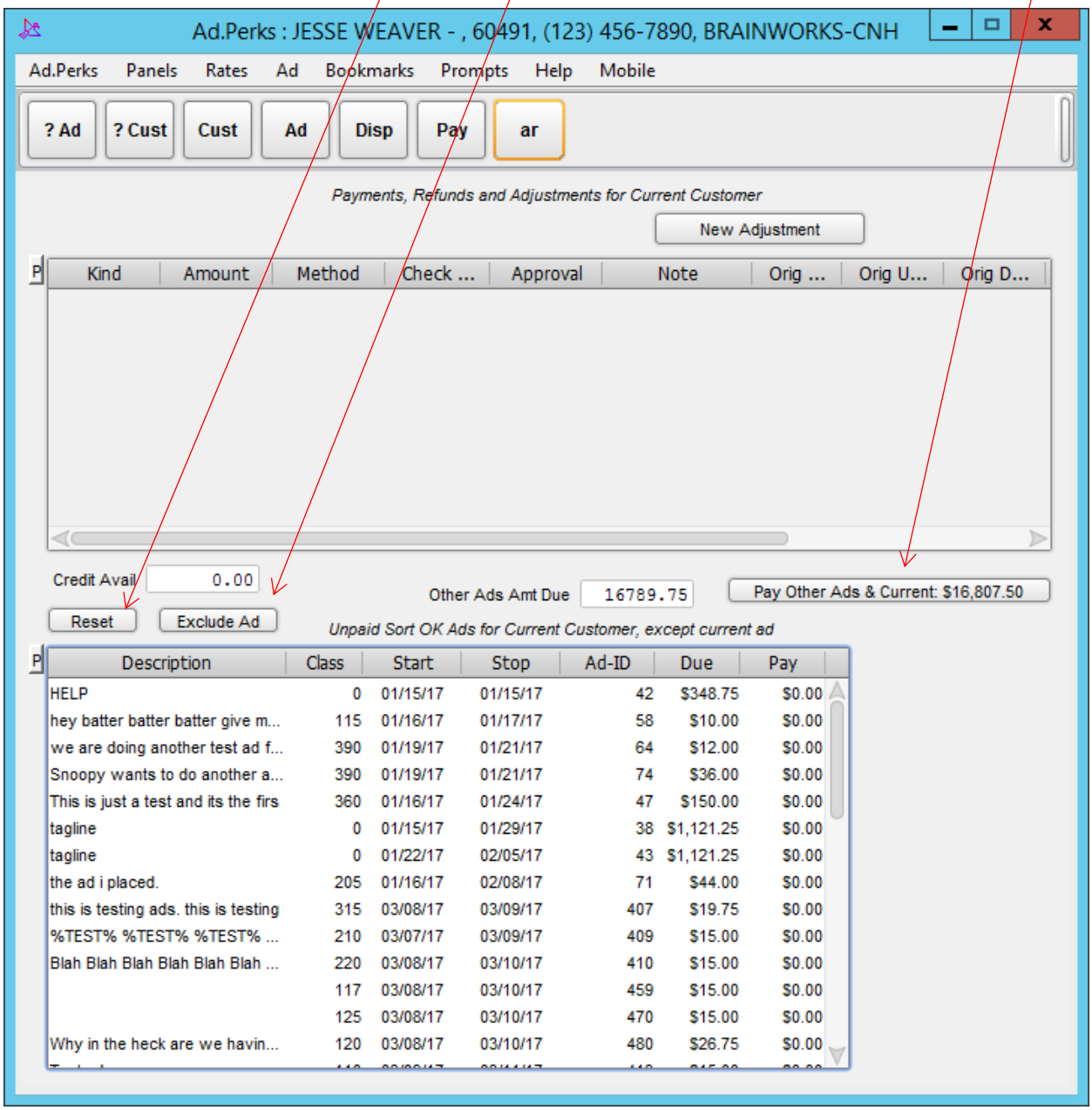
Clicking the **Pay All Ads** button will redirect the user to the **ar** panel…



The bottom portion of the **ar** panel will show all ads available for payment. If you wish to pay all but one or two, then highlight the ads you want to exclude and click **Exclude Ad.**
If you wish to pay all ads and have finished excluding any ads you may not want to pay, then click **Pay Other Ads & Current $ xxx.xx."**

If during the selection process you'd like to start over, click **Reset.**

Once you have selected which ads you'd like to pay, the following screen appears. From here, the procedure is the same as a regular single ad payment.



MAKE GOOD AD

Per Accounting, the procedure for Make Good ads is as follows.

1. Schedule the ad normally.
2. On the **Disp Panel**, use the Rating Codes to select correct percentage of Makegood.
3. Select Reason Code of **MKG – Makegood**
4. In Override Reason Note box, enter the original ad number and the reason it is a make good.
5. Cost and Save the Ad.

CLEAR AD FROM SCREEN

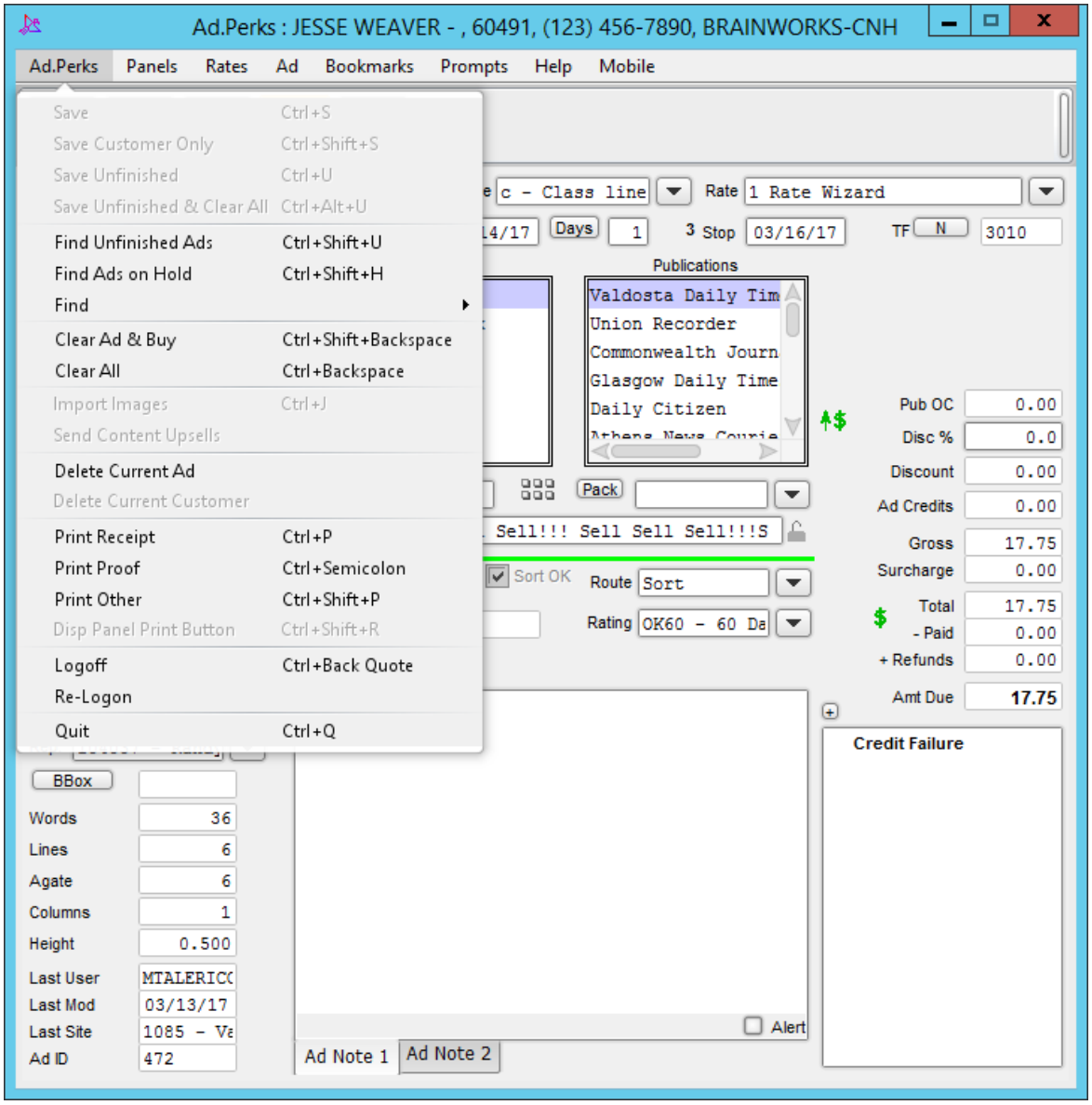
You may save an ad as often as desired, until satisfied with all aspects of the ad.

To start a new ad for the same customer:

1. Click on Ad.Perks in the menu at the top of the screen.
2. Scroll down and click on **Clear Ad & Buy.**

To look for a new customer:

1. Click on Ad.Perks in the menu at the top of the screen.
2. Scroll down and click **Clear All**

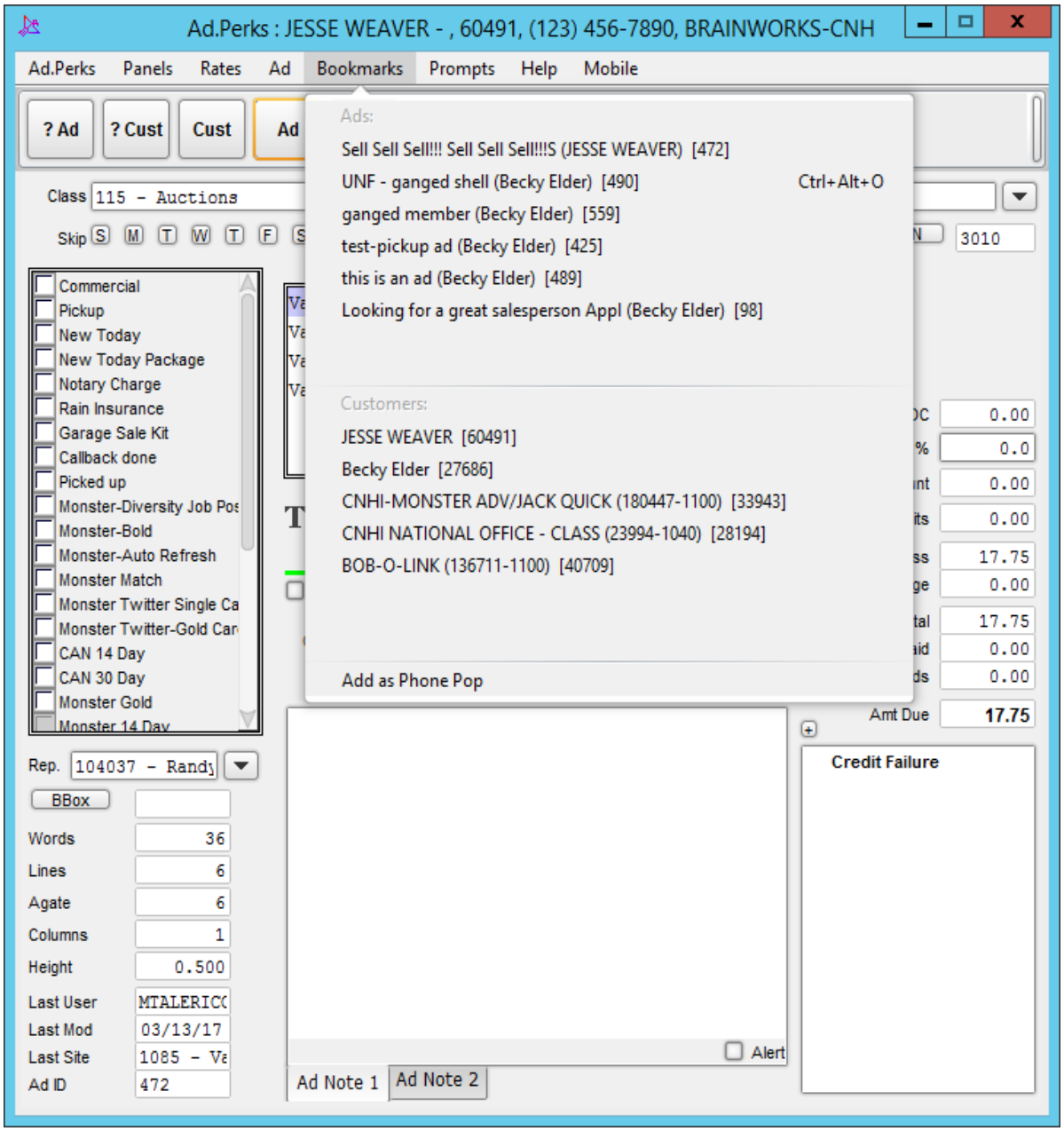


BOOKMARKS

On the Ad.Perks menu, you will see an option called Bookmarks. The last nine customers and nine ads are listed here as a way to quickly retrieve them.

To select either a customer or ad:

- Select **Bookmarks**, **Customer or Ad.**



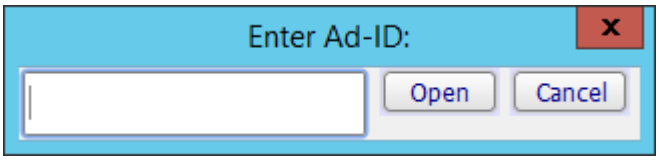
Important Note: Bookmarks are saved in the \Ad.Perks\ dat file

OPENING AN AD WHEN YOU KNOW THE AD NUMBER

If the ad number is known:

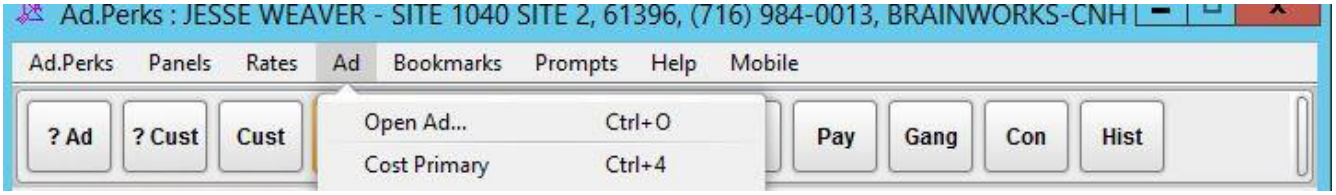
1. Hold down the **Ctrl** key and press the letter **O**. This will populate the "**Enter Ad-ID**" box.

2. Enter the ad number into the "**Enter Ad-ID**" box and click Open.



MODIFYING AN AD

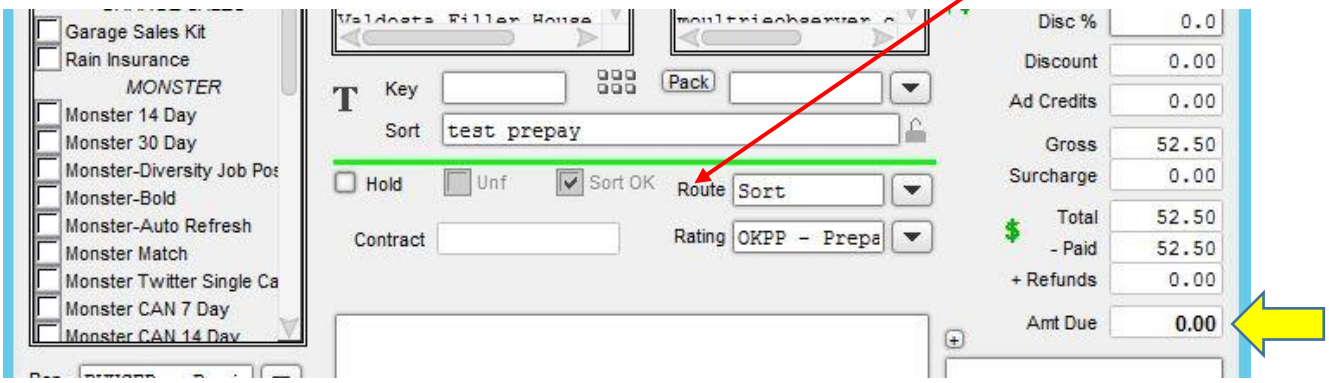
1. Pull up the existing ad that is to be modified.
2. Select **Ad** from the menu options
3. Select **Open Ad** from the dropdown listing



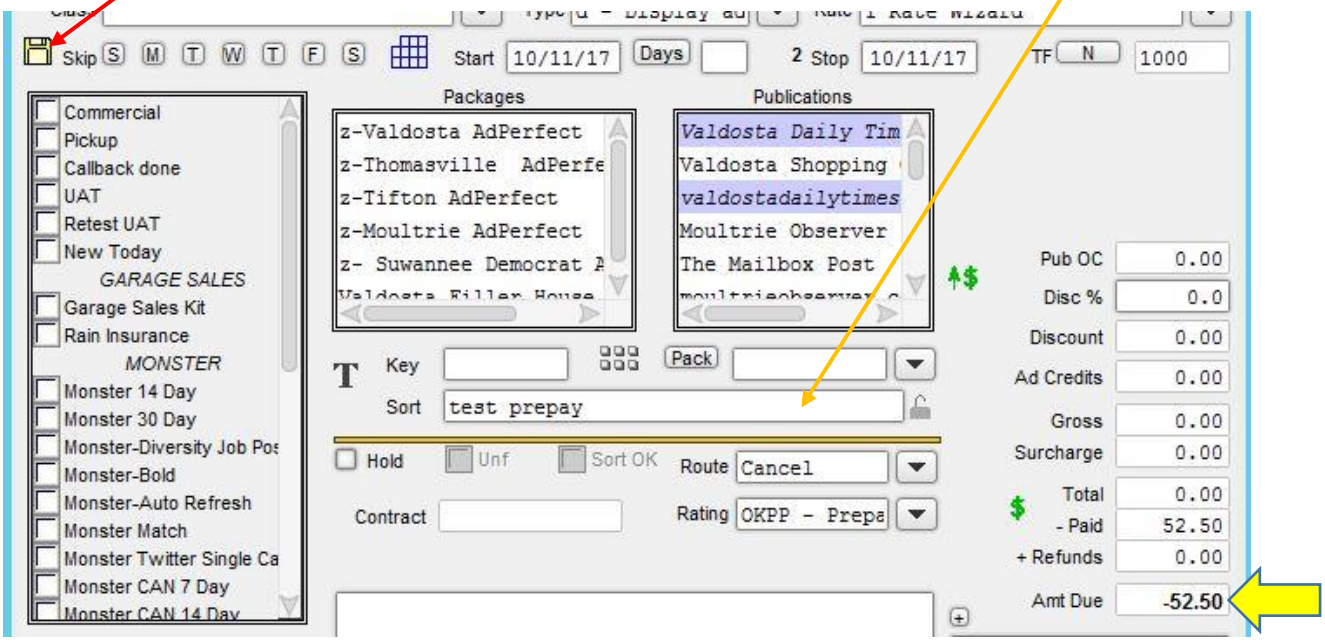
KILLING AN AD

To kill an ad, first load the ad into Ad.Perks. There are two ways to cancel an ad which are contingent upon whether or not any insertions have begun running.

- **(1st way to kill an ad)** - For ads which have NOT yet begun running, navigate to the **Ad** panel, locate the **Route** dropdown field, and change the selection from Sort to **Cancel**.



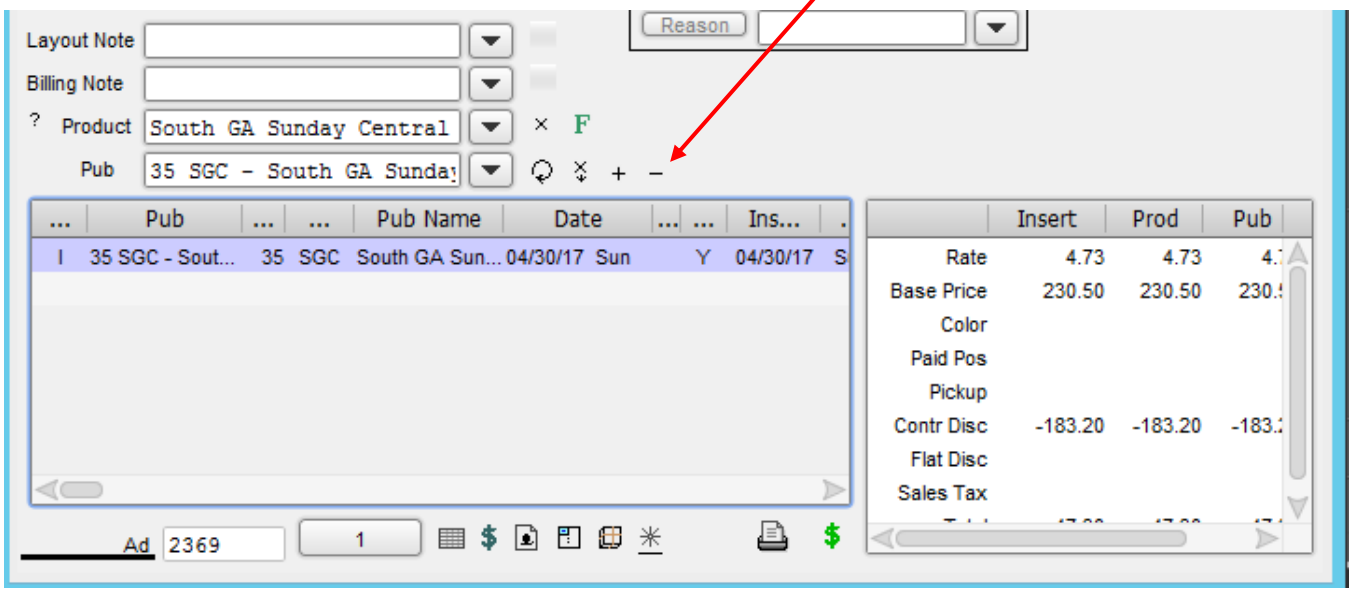
- After the Route dropdown has been changed to **Cancel**, notice that the Sort Bar changes color to GOLD with a thin Black border. This serves as a visual indicator of canceling an ad.
- **Re-cost** the ad. *This particular example is a pre-pay customer. Therefore, the screenshot above lists $0.00 as Amount Due. The screenshot below is the result of (1) Selecting **Cancel** (2) then **Re-Costing** the ad which results in -52.50 as Amount Due (customer is owed a refund). The before and after Amount Due would be different for a customer with established credit.*
- Lastly **SAVE** the changes that have been made to the ad.



2nd way to kill an ad

If an ad has insertions which have published but also has insertions that have NOT yet begun running, a user can then cancel the insertions that have NOT yet begun running by using the **2nd way to kill an ad**.

- **(2nd way to kill an ad)** - Navigate to the **Disp** panel. At the bottom, toggle from the Calendar View to the Insertion View and delete the unneeded insertions from the listing. Notice the "minus sign" just above the list of insertions. Each insertion must be killed individually by:
  - Highlight the individual insertion
  - Then click the "minus sign"
  - Repeat for each individual insertion
- **Re-rate** the ad.
- **Save** the changes to the ad by clicking the yellow diskette at the top of the panel.



☞ If you wish to <u>re-instate the insertion</u>:

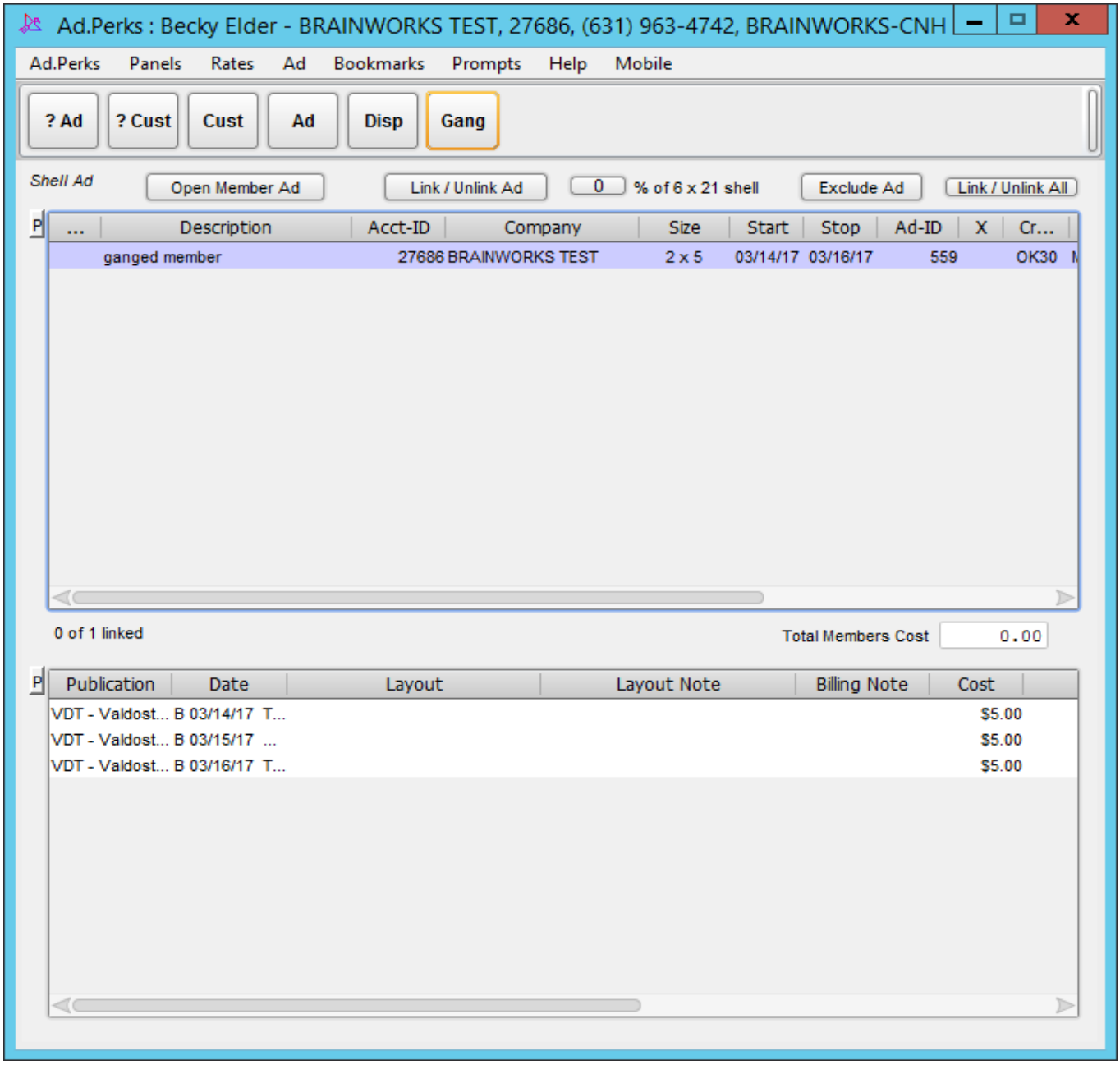
- toggle back to the calendar view
- re-schedule the insertion
- re-cost the ad
- and save the re-instated ad

☞ <u>Concerning **refunds** </u>as the result of **killing** an ad or individual insertion(s) of an ad

- Only involves the **Pre-Pay** customer type
- If the Pre-Pay customer paid by Credit Card, then the sales rep would issue the **refund** using the Pay panel in Ad.Perks. See pg.
  - For any payment type other than Credit Card (Cash, etc.), the refund would be handled appropriately through A/R. See pg.

KILLING A GANG MEMBER AD

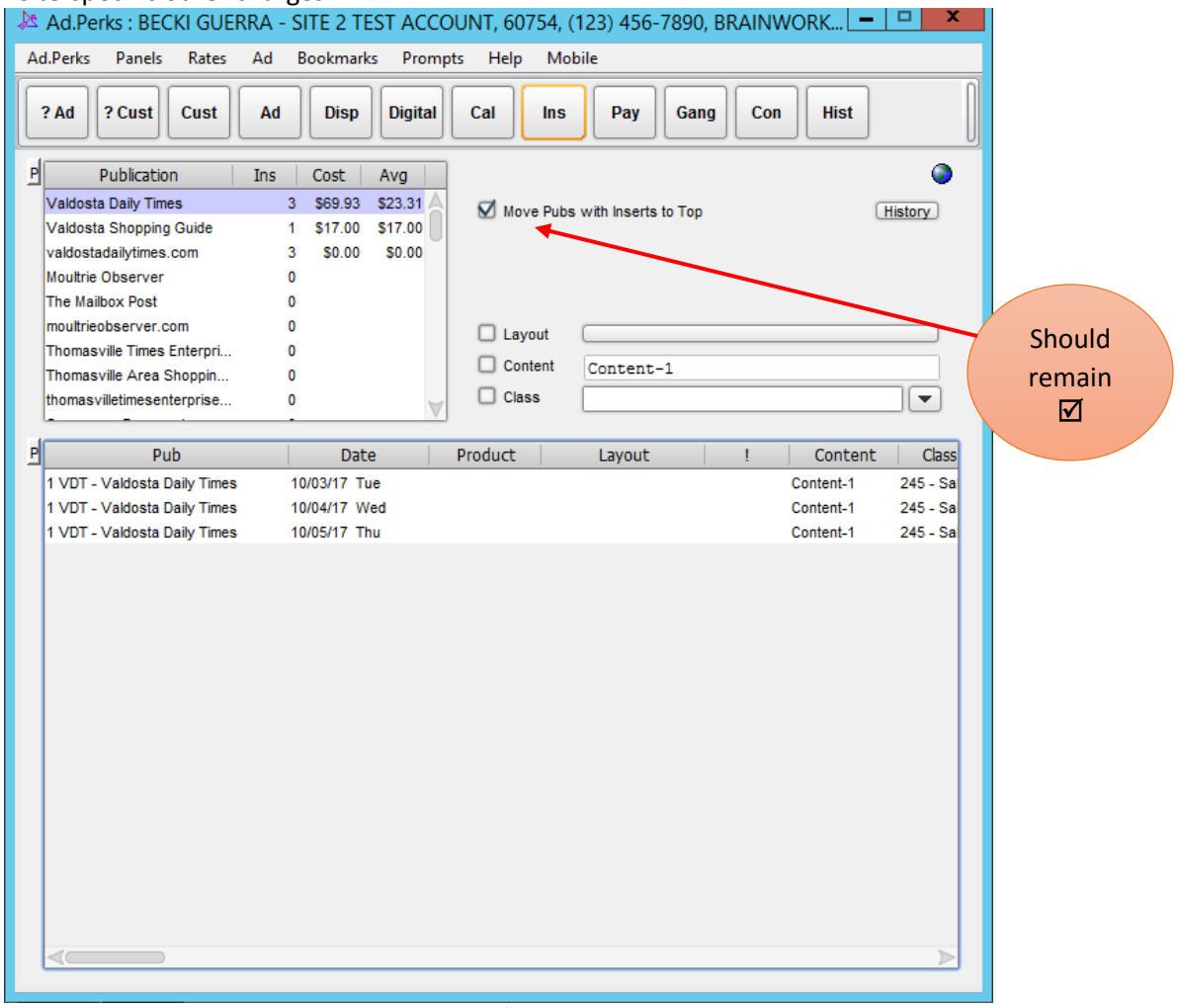
If you kill a gang member ad, after killing the insertion as detailed on the previous page, an additional step is needed to unlink the gang member from the shell.



With shell ad open, go to Gang Panel, select the member ad you just cancelled and using the Link/Unlink Ad button, unlink that member ad.

INS PANEL

In the **Insertion** panel, the user can see a breakdown of the cost of each ad, including the total cost for each publication, the average cost for each insert in each publication, and all modifications to its gross cost, such as all site-specific other charges.



NOTE: Make certain to always keep the *"☑Move Pubs with Inserts to Top"* checked

The Publication Table at the upper left of the panel provides at a glance the number of inserts of an ad that have been scheduled in each Publication, plus the Pub-Independent Costs, which always is shown at the top of the list. The primary Publication selected in the Ad panel will be highlighted by default. It also provides three other important pieces of information:

1. Inserts — the number of inserts scheduled in that publication.
2. Cost — the total cost of all inserts scheduled in that publication.
3. Avg — the average cost of an insert for the publication. This value is the Pub Cost divided by the Inserts, rounded to the nearest cent.

The user can reorder and resize the columns in the Publication Table. The user also can resort the contents of any column.

To reorder the columns, click on the name of any column, hold down the mouse, drag left or right to the desired location and release the mouse. Repeat until all columns are ordered as desired. Once reordered, columns will remain in that order for subsequent searches in this panel, even the next time you launch Ad.Perks, until you change the order again.

To resize columns, move the mouse over the vertical line between the names of any two columns. When the cursor turns into a double arrow, hold down the mouse and drag the mouse to the left or right until the column is the desired size. Repeat until all columns are sized as desired. Once resized, columns will remain in those sizes for subsequent searches in this panel, even the next time you launch Ad.Perks, until you change the sizes again.

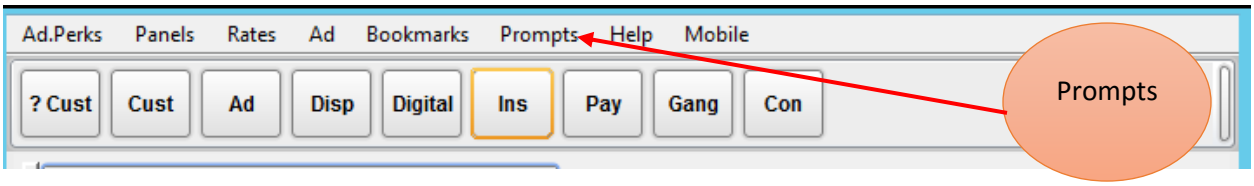
To resort the contents of a column, click on the name of the column. The contents of the column now will be displayed A through Z for alphabetical content and 0 through 9 for numerical content. Click on the name of the column again. The contents now will be displayed Z through A for alphabetical content and 9 through 0 for numerical content.

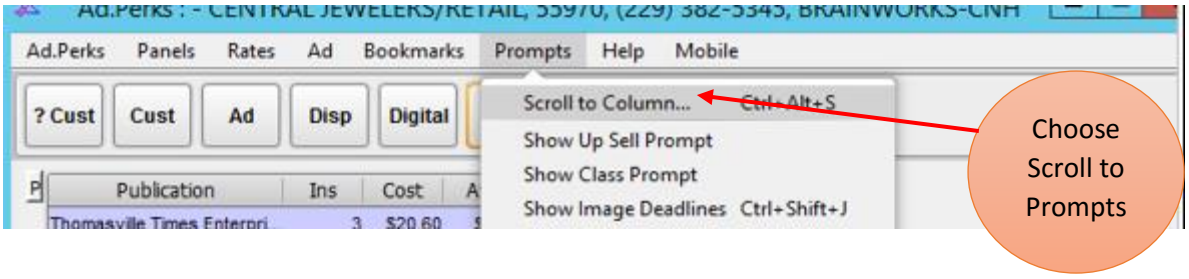
When you click on a publication in the Publication Table at the top of the panel, all of the inserts of the ad for that publication are shown in the Inserts Table at the bottom of the panel. More than 40 pieces of information about each insert may be shown.

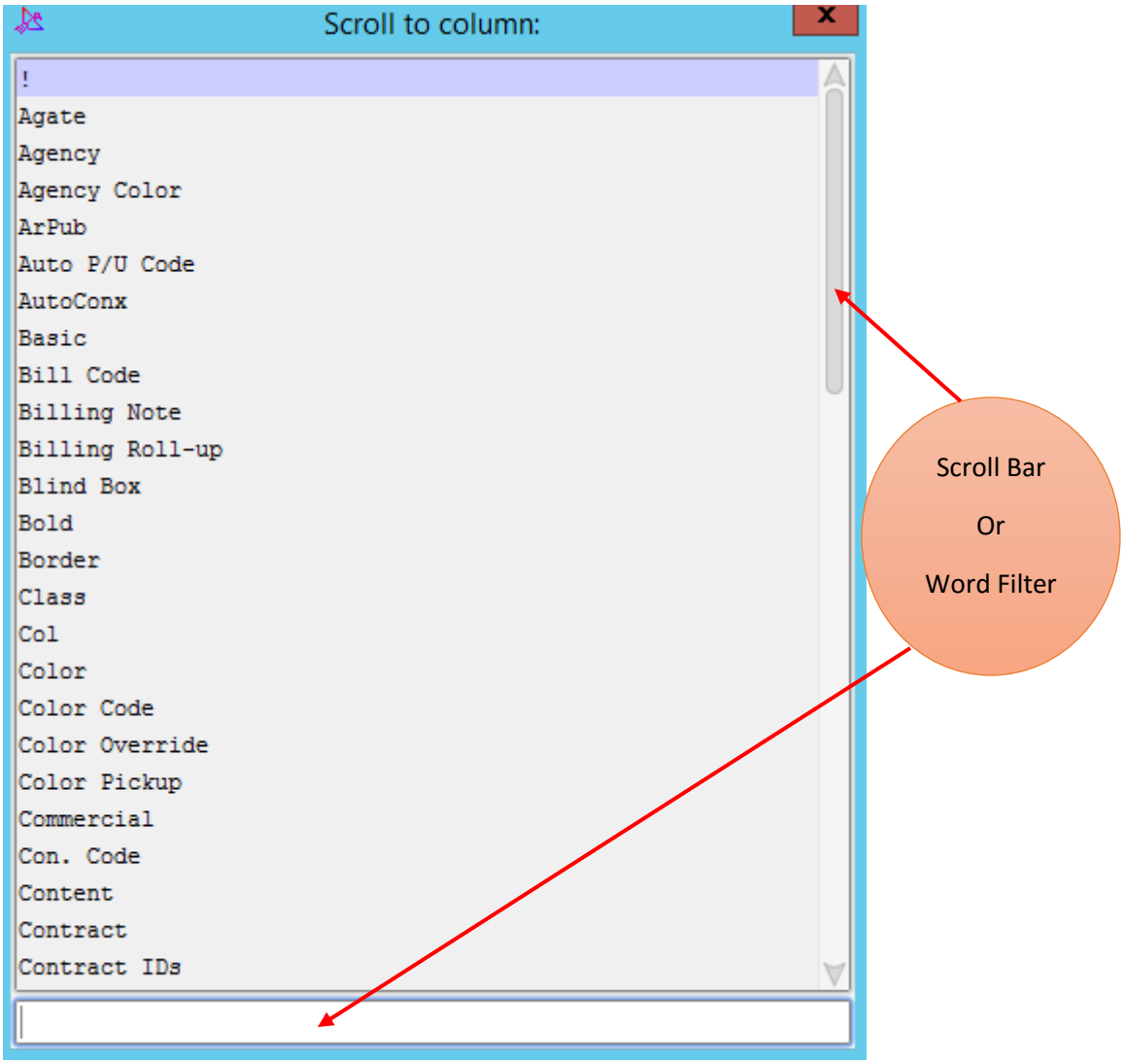
To see all the available information, click on the scroll bar beneath the Insert Table and drag to the right until you can see all desired columns.

Scroll to Column

You can use **Scroll to Column** under **Prompts** in the **INS** panel to find the columns easier in this panel. Go to the **prompts** menu option, select **scroll to column**, and you can search for the column or word here.

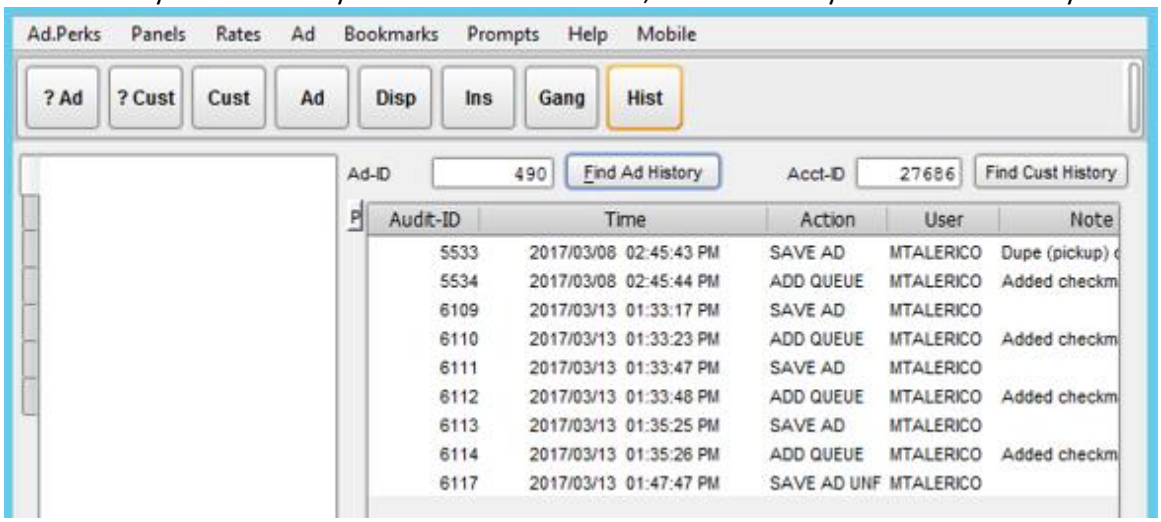





Scroll to column:
!
Agate
Agency
Agency Color
ArPub
Auto P/U Code
AutoConx
Basic
Bill Code
Billing Note
Billing Roll-up
Blind Box
Bold
Border
Class
Col
Color
Color Code
Color Override
Color Pickup
Commercial
Con. Code
Content
Contract
Contract IDs
Scroll Bar
Or
Word Filter

HIST PANEL

This panel will show you both history of the current ad loaded, and will show you customer history as well.



To see Ad History:

- Ensure that the ad number is in the AD-ID field, then click Ad History.

There will be a line for each audit record for the ad, including when the ad was saved, when queues were set for the ad, when proofs and receipts were generated, and when ads are released from the queue.

- If you hold down the Control key while clicking Ad History, you will also be able to see information about the sorting and placement of the ad.

To see the details of each entry:

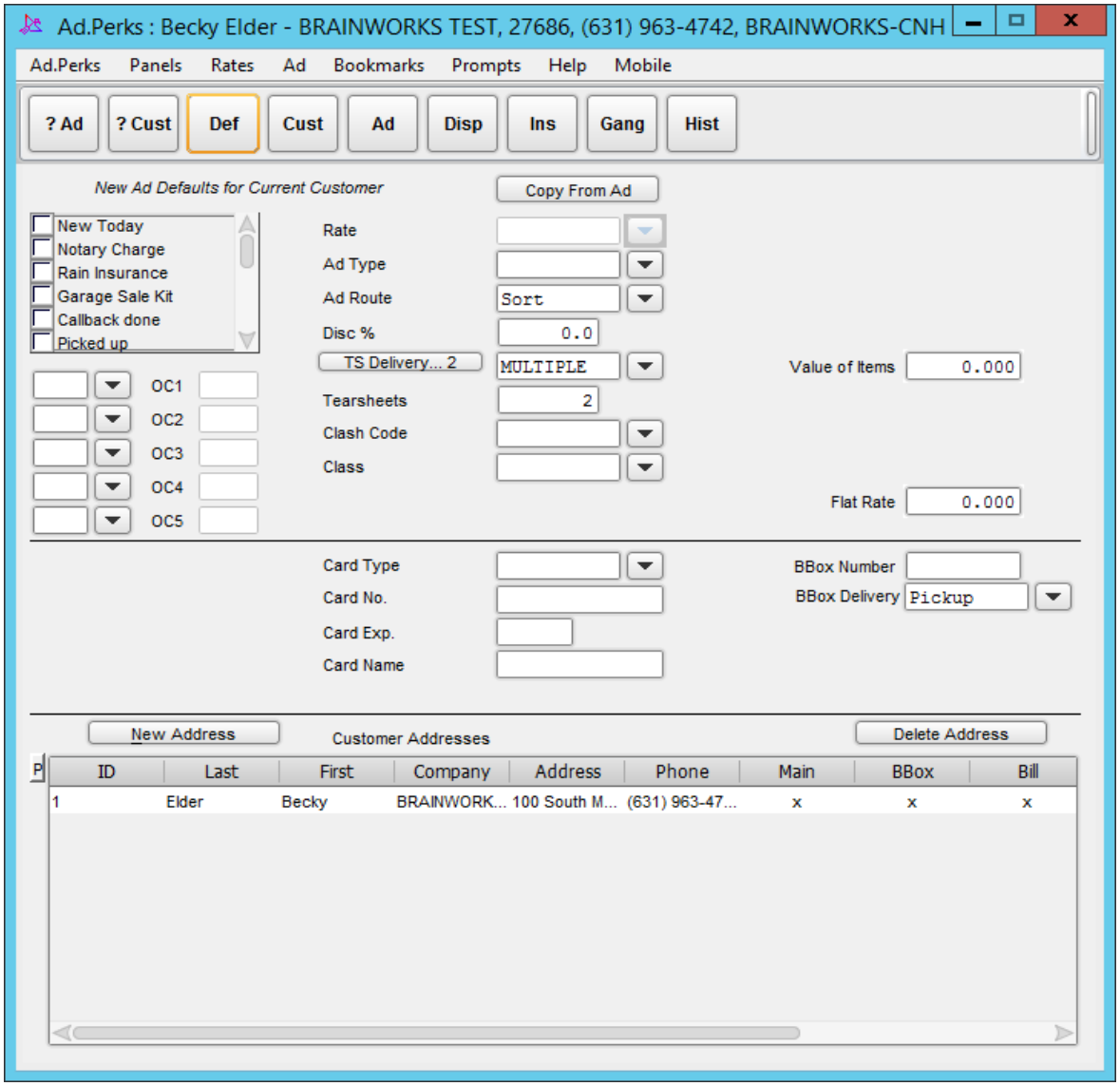
- Click once on the entry to highlight it, then using the tabs on the left side of the screen, you may look at different audit information.

This panel is very helpful in determining information about why an ad was put on hold, who released it, was a proof generated for a customer and when and did it transmit successfully. Please refer to the Ad.Perks User C manual for further details about this panel.

DEF PANEL

This panel is where you may view, set up, or modify defaults by customer.

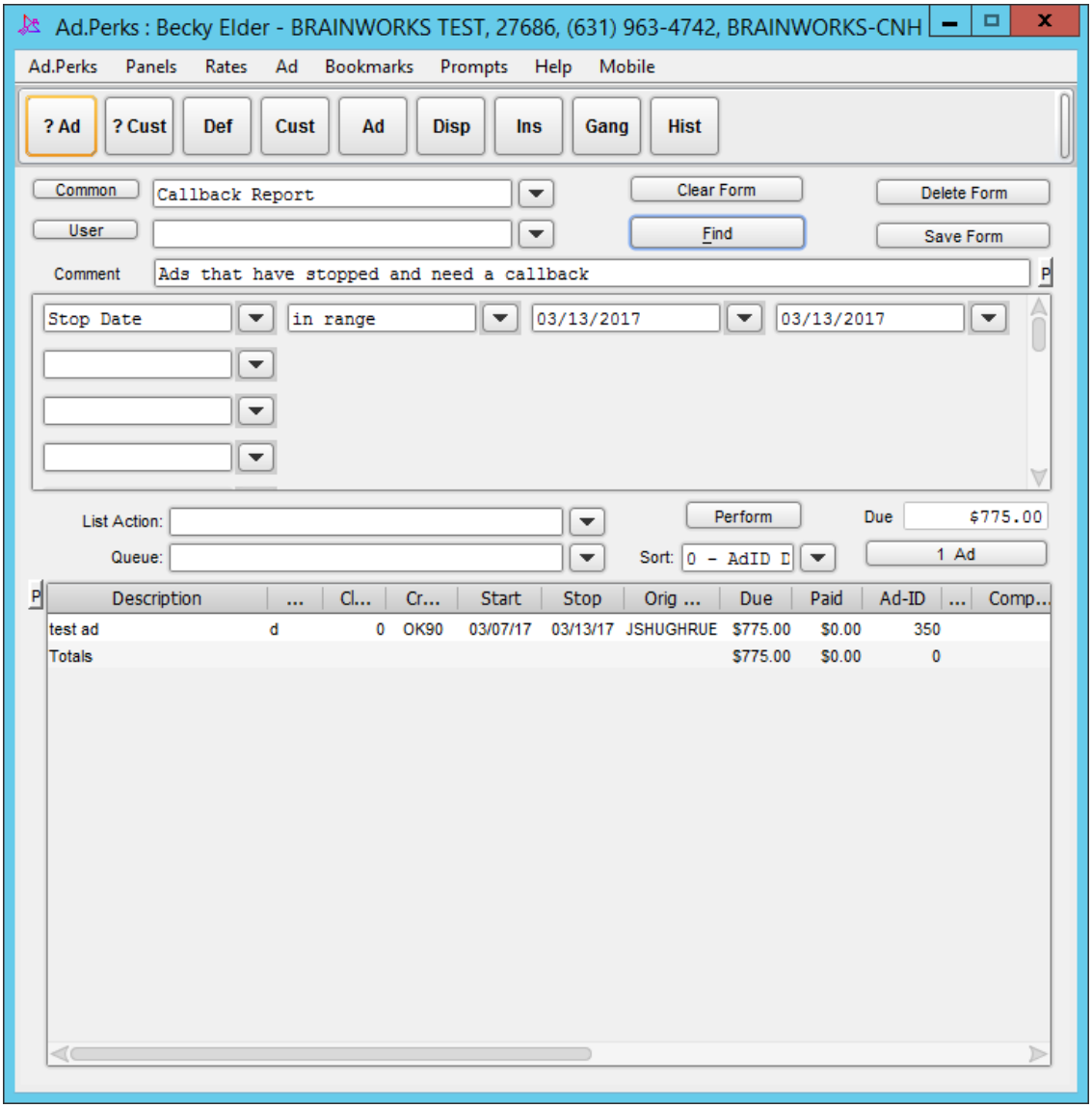
Defaults panel settings override user preferences. So, if a user has a default ad type but makes a new ad for a customer with a different ad type in the customer's Defaults panel, the rate in the Defaults panel will be displayed.



Please contact your site super user or your supervisor if you have questions regarding what would be appropriate to save as a customer default.

PRINTING CERTAIN WINDOWS IN AD.PERKS

Throughout the application, you will see the letter **"P"** next to tables. This means that the information contained in that window can be printed. Click on the **P** and the following appears. You may customize the look of the printout, then print.

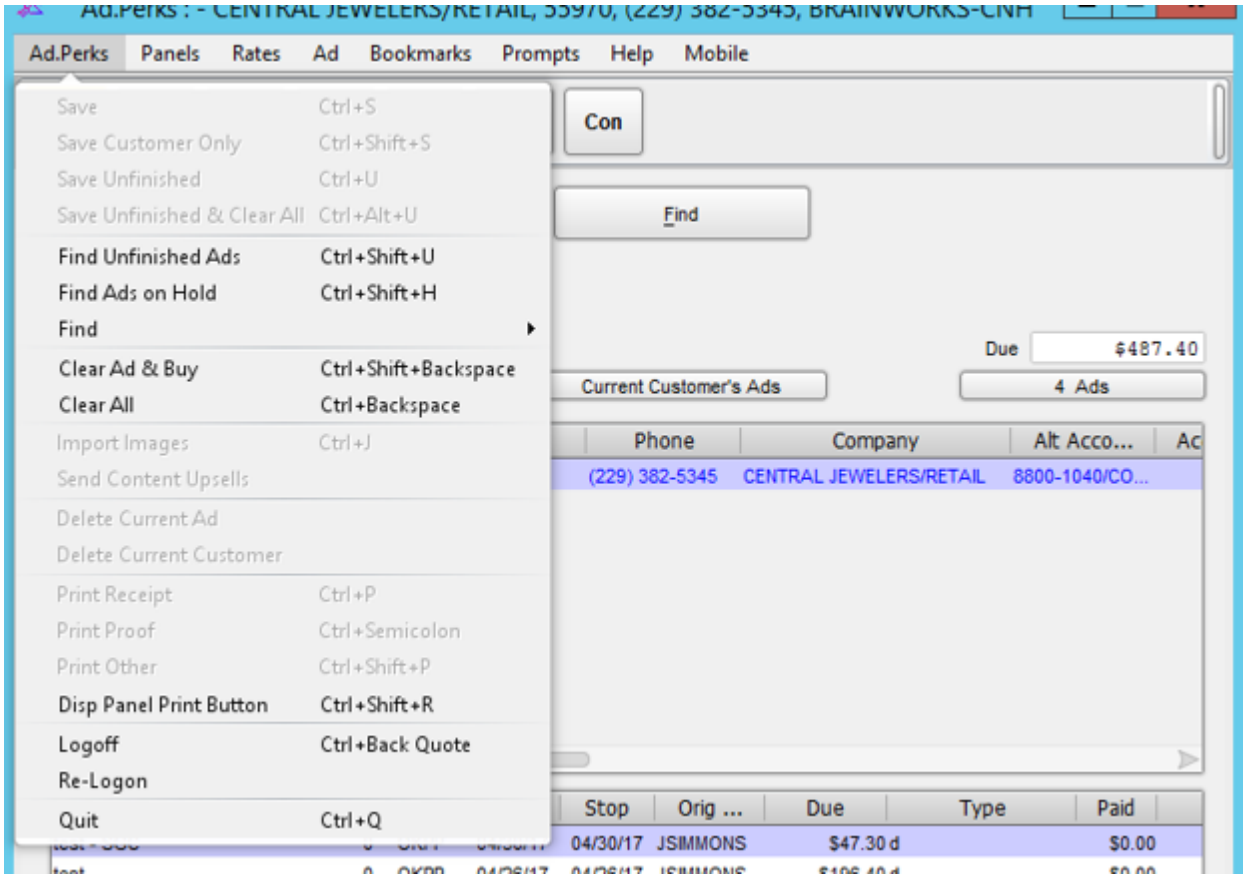


Another handy way of viewing the data is to click **Clipboard**, then open Excel and position your cursor in cell A1, then Paste. It will automatically create the same columns you see on your report.

HOW TO LOG OUT OF AD.PERKS

To properly log out of Ad.Perks, use the following steps.

Select Log Off from the Ad.Perks menu. Click Log Off on the box that appears, then click Quit.



Lastly, select **File, Exit** on the InDesign screen.

Following is the complete list of the keyboard shortcuts in Ad.Perks. F1 — Switch to Find Ad panel

- F2 — Switch to Find Customer panel
- F3 — Switch to Defaults panel F4 — Switch to Customer panel Shift-F4
  — Switch to Account panel
- F5 — Switch to Ad panel (standard) or switch to Disp panel (if Prefer Disp
- Panel checked on User panel) Ctrl-F5 — Switch to Buy panel
- Shift-F5 — Switch to Disp panel (standard) or switch to Ad panel (if Prefer
- Disp Panel checked on User panel) Ctrl-Shift-F5 — MyAdBox Services
  F6 — Switch to Ad+ panel
- Ctrl-F6 — Turn Hold mode on/off (version 12.2.2.0 and higher) Shift-F6 — Switch to Digital panel
- F7 — Switch to Calendar panel
- Ctrl-F7 — Switch to Media panel
- Shift-F7 — Query Brainworks database (available only if logged in as user named Brainworks)
- Ctrl-Shift-F7 — Stop Ad (same as clicking stop sign icon on Ad panel) F8 — Switch to Inserts panel
- F9 — Switch to Payments panel
- F10 — Access Ad.Perks menu
- F11 — Open next ad in list in Find Ad panel
- Ctrl-F11 — Clear Queue
- Shift-F11 — Reject Queue
- F12 — Begin to change Tab order
- Ctrl-F12 – Save changes to Tab order
- Ctrl-A — Select all text in edit fields, text areas, combo boxes or lists. Auto
- Pay in AR panel. Approve selected item in Media panel.
- Ctrl-Shift-A — Cleanse Address
- Ctrl-B — Turn Cost By Form on/off. In Web panel, Build Content. In Find Ad, Find Cust, Cal, Ins, Pay, AR, Con and Hist panels, open table in browser.
- Ctrl-Shift-B — Requery balance of customer's ads. In Web panel, Build Content
- Ctrl-C — Copy selected text Ctrl-Shift-C — Clone Ad Ctrl-D — Duplicate Ad
- Ctrl-Shift-D — Pickup Ad
- Ctrl-E — Edit Pub Selections
- Ctrl-Alt-E — Extract selected item in Media panel
- Ctrl-Shift-E — On the Map panel, opens the Polygon Group Chooser. On other panels, if a customer or ad is loaded, opens the Schedule Ad in Publication dialog.

- Ctrl-F — Does Find in Find Ad, Find Customer and History panels
- Ctrl-Shift-F — Find Next in Rates panel
- Ctrl-G — New Make Good
- Ctrl-Shift-H — Show all user's ads on Hold (versions before 12.2.2.0)
- Ctrl-I — Switches to Inserts panel. When viewing Inserts panel, switches to Ad or Disp panel, based on user preference for F5 shortcut
- Ctrl-J — Imports images
- Ctrl-Shift-J — Displays Images Deadline dialog
- Ctrl-K — Switches to Calendar panel. When viewing Calendar panel, switches to Ad or Disp panel, based on user preference for F5 shortcut
- Ctrl-Shift-K — Toggles between the Calendar view and the Insert view in the
- Display panel.
- Ctrl-L — Lock/Unlock Sort Text
- Ctrl-M — Switches to Payments panel. When viewing Payments panel, switches to Ad or Disp panel, based on user preference for F5 shortcut
- Ctrl-Shift-M — Displays Messages Palette
- Ctrl-N — New Customer on Find Customer panel, New Address on Defaults Panel, New Content on Buy panel, New Payment on Payments panel, New Payment on AR panel, and New Subcontract Line Item on Contracts panel
- Ctrl-O — Open Ad
- Ctrl-Alt-O — Open top Unfinished ad in Bookmarks
- Ctrl-Shift-O — Open parent of Ad
- Ctrl-P — Print Receipt
- Ctrl-Alt-P — Displays Phone Pops Palette
- Ctrl-Shift-Alt-P — Displays Simulate Incoming Phone Pop dialog
- Ctrl-Shift-P — Print Other
- Ctrl-Q — Quit
- Ctrl-Shift-Q — Force Quit (use only if Ctrl-Q doesn't quit Ad.Perks)
- Ctrl-R — Recost using Primary/Secondary rates
- Ctrl-Shift-R — Print on Display panel
- Ctrl-S — Save Ad
- Ctrl-Shift-S — Save Customer Only
- Ctrl-T — Switch to Text Editor, or switch to Web panel if Web panel is applic- able but not yet visited
- Ctrl-Shift-T — Switch to Web panel. In Web panel, switch to Ad panel

- Ctrl-U — Save Unfinished
- Ctrl-Alt-U — Save Unfinished and Clear All Ctrl-Shift-U — Show all user's Unfinished ads Ctrl-V — Paste cut or copied text
- Ctrl-W — Edit Package Selections
- Ctrl-X — Cut selected text
- Ctrl-Y — Does Package Upsells if Package Upsells is enabled. Otherwise, switches to Ad+ panel. When viewing Ad+ panel, switches to Ad panel.
- Ctrl-Z — Switch to Brainworks Accounts Receivable program
- Ctrl-Shift-Z — Switch to Brainworks Circulation program (not functional)
- Ctrl-. — Halt List Action on Find Ad panel
- Ctrl-; — Print Proof
- Ctrl-` — Logon/Logoff
- Ctrl-,: Show Statistics dialog (used by Brainworks Customer Support)
- Ctrl-Shift-` — Diagnose (used by Brainworks Customer Support)
- Ctrl-Shift-= — Debug (used by Brainworks Customer Support)
- Ctrl-= — Clear All
- Ctrl-Backspace — Clear All
- Ctrl-Shift-Backspace — Clear Ad & Buy
- Ctrl-Space — Cost using primary rates
- Ctrl-/ — Choose ad's original user
- Ctrl-Shift-/ — Show statistics on Ad.Perks Robot
- Ctrl-[— Switch to enabled panel to the left
- Ctrl-] — Switch to enabled panel to the right Ctrl-1 — New Payment
- Ctrl-2 — New AR Payment
- Ctrl-3 — New Ad Credit
- Ctrl-4 — Cost using primary rates
- Ctrl-Shift-4 — Cost using alternate rates

- Ctrl-5 — Switch to Accounts Receivable 1 panel
- Ctrl-6 — Switch to Accounts Receivable 2 panel (integrated AR system only) Ctrl-7 — Switch to Contracts panel
- Ctrl-8 — Switch to User panel Ctrl-9 — Switch to Rates panel
- Ctrl-0 — Switch to History panel
- Enter or Return — In Find Customer panel, does Find Customer when cursor is in address field. In Tables, causes program to act upon selected row. Also, same as clicking Save/Done/OK in most dialog boxes.
- Esc — Close class/upsell prompt window. Also, same as clicking Cancel in dialog boxes.