Media

Chapter 5

MEDIA

Introduction

Clients & Profits X has built-in full-featured media planning, buying, and tracking capabilities. These media functions seamlessly integrate with job tickets, job costing, and client billing. The media system lets you build detailed broadcast, print, interactive, and outdoor media orders based on TV, newspaper, magazine, and alternative media buys, as well as simple media estimates. Clients & Profits X keeps a list of publications, media companies, and stations, as well as the available ad sizes and program times that are most commonly used. By using these lists, you can create media plans with little rekeying. In this chapter you'll learn about:

■ creating lists of stations/programs and publications/ad sizes
■ adding broadcast and print media plans
■ adding and printing media estimates
■ making insertion and broadcast orders automatically from plans and estimates
■ adding and printing broadcast orders and insertion orders
■ tracking materials due and space closing dates
■ printing media plans, estimates, and reports
■ automatically import media buys from SmartPlus, Strata, and TAPSCAN

For help using any part of Clients & Profits X, click the button from any window to open the on-line user guide. This web-based user guide features step-by-step instructions, explanations, tips, demonstrations, and links to FAQs, tech notes, and tutorials from www.cnp-x.com/support. The web site is continually updated, so it's more timely and helpful than a printed user guide.

Overview: How Clients & Profits X Manages Media

The media functions in Clients & Profits X are designed to replace the database or spreadsheet-based custom systems that most shops now use to plan, buy, and track media. It doesn't try to replace high-volume media buying systems like SmartPlus, TAPSCAN, or Strata. Instead, it is designed for shops that buy a relatively small amount of media—and whose planning and analytical needs are simple.

Although it can create broadcast buys, Clients & Profits X is optimized for print media planning, buying, and tracking. It works best in shops that primarily buy business-to-business media, instead of consumer broadcast media. That's because it doesn't import and process ratings data from media services like Nielsen and Arbitron. Instead, you'll set up and maintain your own station, publication, program, ad size, and rate information. It's a big job to maintain these files, so it's only practical if the number of media plans you do is small.

There are two ways to buy media with Clients & Profits: media plans and media estimates. Media plans are elaborate and automatically lookup ad rates, while media estimates are simple and added manually. They both print a professional-looking report for your client to sign, authorizing your media buys. Otherwise, they have different purposes.

Media estimates vs. media plans

Media plans use the station and publication data (which you'll set up) to automate the planning process—so there's no rekeying information from the rate table to the media plan. Media estimates skip the planning process—instead, you'll simply type in the details about the media buy each time you need one. There are also specially-designed media windows and forms for broadcast and print plans.

Media estimates, however, are free-form. You can customize the information on media estimates as needed. Every media estimate you do could conceivably have different labels and headings, depending on the different kinds of media that you buy. Since there's less to set up, creating a media estimate is much faster than creating a media plan (which may be reason enough to use them).

If you don't need a planning system, or use another system (like a spreadsheet or Tapscan) to plan your buys, consider using only media estimates. Once the media estimate is added, it can easily create insertion orders automatically without rekeying. This saves lots of time and effort, as well as keeps your insertion orders more accurate.

Publications, ad sizes, and contract rates

The Publications/Ad Sizes/Contract Rates window lists the publications you most commonly use, as well as the various ad sizes available for each publication. Each publication can have dozens of ad sizes, each with details about its position, commission, space close, and materials close dates. These production specifications are carried over to the media plan and to media

reports, for easy reference. Each publication ad size has a standard rate. In addition, you can set up contract rates for each client. This option lets you specify special ad sizes and rates that are only available to a client. So when a print buy is added for a particular publication, the client's special rate will be used instead.

Stations, programs, and contract rates

The Stations/Programs/Contract Rates window lists the stations you most commonly use, as well as the programs/times for each station. You can enter a virtually unlimited number of stations. And each station can have hundreds of different programs and times. A station can have a set of programs, each with its rating and a standard cost. Or, you can set up contract rates for specific programs and clients. Each client can have its own table of contract rates for each station. So when a broadcast buy is added for a particular station, the client's special contract rate will be used automatically.

Insertion orders, broadcast orders

Insertion orders can be added manually into the Insertion Order window, or created automatically from print media plans or media estimates. When created automatically, there's no rekeying—the media buy's publication, ad name, position, cost, and other details are copied directly to the insertion order. You can make insertion orders from media plans and estimates on demand; the entire process takes less than a minute. Once the insertion order is saved, you can review it, make changes, then print it for the publication.

Broadcast orders can be added manually into the Broadcast Order window, or created automatically from broadcast media plans. When created automatically, the media buy's station, rating, number of spots, and other details are copied directly to the broadcast order. Once the broadcast order is saved, you can review it, make changes, then print it for the station.

Interactive orders, outdoor orders

Clients & Profits X can print interactive orders specifically designed to buy on-line advertising. Outdoor orders are designed especially for buying media space on billboards, buildings, and other out-of-home locations. Interactive and outdoor orders are added like print and broadcast orders; they get job numbers and job tasks, are costed from vendor invoices added in Accounts Payable, and can be billed in one step in Accounts Receivable.

Media estimates

If you buy mostly print media (magazines and newspapers) for your clients and you're planning needs are basic, use a media estimate. Adding a media estimate is similar to adding a job: the media estimate has a number, a client, a description, and line items just like a job has tasks.

Media estimates are very customizable. Each media estimate has five column labels (e.g., publication name, issue date, close date, ad caption, and ad size)

Feature	How it works, how it's used
Media Calendar	Clients & Profits X features an integrated media calendar. The calendar, which conveniently appears whenever users work with media, lists upcoming space closing and material due dates as well as user-defined calendar "tickler" entries. These scheduled entries can be automatically e-mailed to media planners, buyers, and vendors.
Publications/ad sizes/media companies tables	The names, addresses, and phone numbers of the most commonly-used publications and their various ad sizes (including prices) can be set up before adding print media plans. The information entered for each publication and ad size is copied automatically to new print plans, saving time and reducing data-entry errors. The publications table can be updated any time as information changes.
Stations/programs tables	The Stations table lists the name, address, and account details for hundreds of different radio, television, and cable stations. The Times/Programs table contains descriptions and costs of the time slots offered by each station. This information is used automatically by broadcast media plans, and is copied to broadcast orders.
Media estimates	Simple, quick media estimates can be created for clients showing them a schedule of media buys for any number of publications or stations. The printed media estimate looks like a job estimate, and includes a client approval signature line. Insertion orders can be made automatically from media estimates.
Broadcast media plans	Detailed broadcast media plans can be created that show scheduled radio, television, cable, buys, including the number of spots, rating, cost per point, and more. Broadcast orders can be generated directly from broadcast media plans.
Print media plans	Complete print media plans can be made that show schedule ad placements for daily newspapers, weekly periodicals, or monthly magazines. Insertion orders can be created from print media plans without rekeying.
Insertion orders, broadcast orders	Orders can be created automatically from broadcast and print media plans. Orders can be placed any time using the information already saved on the media plan, saving time and eliminating rekeying errors. Orders are saved directly in the Media Orders table, where they can be proofed, printed, then billed—without retyping.
Media billing	Once insertion and broadcast orders are created from media plans, they can be easily and quickly billed. Orders can be pre-billed directly from the Insertion/Broadcast/Interactive/Outdoor Orders window (choose Edit > Pre-bill) one-by-one, or billed together in batches by client in Accounts Receivable. Insertion and broadcast orders remember the client's invoice number, so it's easy to keep track of unbilled media.
Media WIP accounting	Media accruals for work in progress are posted automatically from media billing. The net cost of the insertion or broadcast order is used for accrual journal entries, which update a special WIP accrual G/L account. When the media vendor's invoice is entered, it reconciles the actual cost of the media with the accrued cost then makes the automatic reversing entry.
Media reconciliation	In Accounts Payable, the actual number of broadcast spots or ad placements is reconciled with the planned spots from the insertion or broadcast order. Each order keeps its own running balance of planned cost vs. actual cost, making it easy to bill clients accurately.
Importing SmartPlus, TAP-SCAN, and Strata media buys	The built-in Media Link imports broadcast orders from MRP's SmartPlus, TAPSCAN, and Strata. Imported buys appear automatically in the Broadcast Orders window, where they can be billed like other broadcast orders. A "standard media interface" lets any other media buying system export buys to Clients & Profits X using a simple-to-program import file format.

Overview (con't)

that you can change for different kinds of media buys. You can enter a long description, a campaign code (for post-buy tracking), a standard disclaimer, and up to three approval names. These details appear on the printed media estimate.

Media estimates don't affect job tickets until the insertion orders are created.

Print and broadcast media plans

On the media plan for a client, enter a plan number, name, and other details, then add separate buys for each station or publication.

Print media plans can be set up for monthly, weekly, or daily publications. For magazines, these periods can represent months during the year. For newspapers, they can represent different weeks. Since these periods are customizable, they can handle any kind of time range; however, the periods you enter apply to every buy on the media plan.

Adding media buys is like adding tasks to jobs. You'll enter the publication or station code, which behaves like the task code. You can see the publication's ad sizes (or the station's programs/times) from a pop-up Lookup List. Double-clicking on an ad size (or program) enters it onto the media plan. Most importantly, the rate is copied to the media buy automatically. For broadcast buys, you'll enter the number of times the spot will run—and the total cost and rating points are calculated automatically. You can add many different buys for many different publications (or stations) onto the same media plan.

When the media plan is printed, the buys you've entered are grouped together by publication (or station).
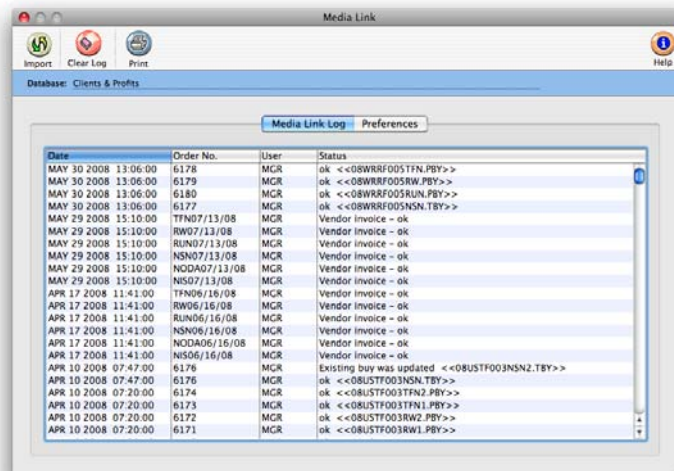
Media billing

There are two ways to bill media in Clients & Profits: pre-billing an individual insertion (or broadcast) order or summary billing one or more orders.

An insertion or broadcast order can be easily and quickly pre-billed directly from the Insertion/Broadcast Order window. It's simple: find the order, then choose Pre-bill Order from the Edit menu. The order's details are copied instantly to a special pre-billing invoice. The invoice is numbered automatically. You can see pre-bill invoices on the proof list, make any needed changes, then post them. Once posted, the pre-bill invoice information updates the

insertion or broadcast order so it can't be billed twice.

It's also easy to bill many insertion or broadcast orders at once. The media billing option in Accounts Receivable displays a window listing the client's unbilled insertion or broadcast orders. You can select one, many, or all orders for billing by clicking on the checkbox next to the order line item. The media billing invoice has a different layout than regular job billings; it shows the publication or station, ad name, ad size, issue date, and gross cost.

Media preferences

Your media preferences let you standardize some of the information seen on insertion and broadcast orders. This information, such as the disclaimer, logo, and print copies are copied to orders automatically to save time. You can even order media under a different name and address, which is ideal for in-house agencies. You can customize how insertion and broadcast orders are automatically numbered, including entering the next order number.

Media and the General Ledger

There is no direct link between media plans and the General Ledger. Adding a media plan doesn't affect jobs. The job ticket is updated when an insertion order is created from a media plan; the job task's Net and Gross total increases to show that you've ordered something. Insertion orders, like purchase orders, don't affect the General Ledger either. The General Ledger is only affected when the station or publication's invoice arrives or the insertion is billed.

You can account for insertion orders made during the month with general journal entries to a media G/L account. A list of insertion orders added during the month can be printed from the Media Reports window; this total would be added as a journal entry, then reversed next month. The difference between the month's insertions is your actual media cost.

The Media menu
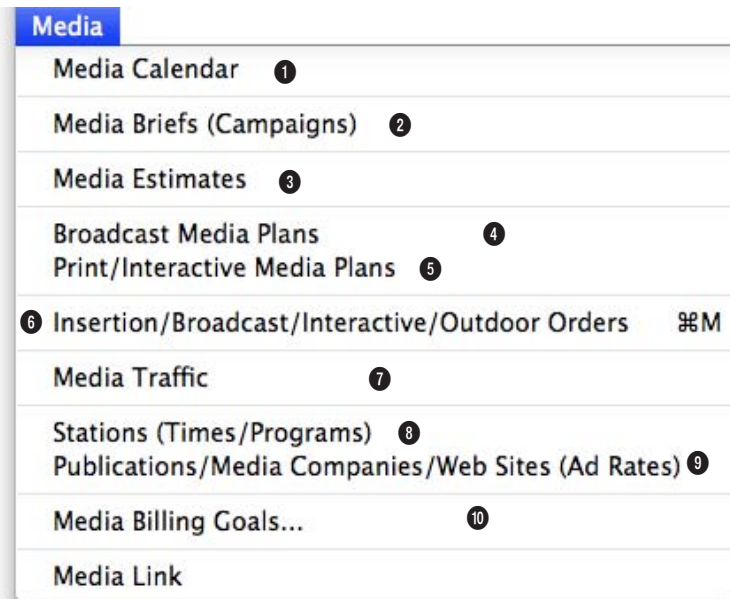
1 The **Media Calendar** displays all of the month's space closings (from media plans and estimates) and material due dates (from insertion and broadcast orders).

2 **Media Briefs** are like creative briefs for media plans and estimates. They organize the objectives, goals, and budgets for a client's media buys.

3 **Media Estimates** are simple summaries of the media buys that you place for a variety of publications and a range of dates. It's the quickest way to show a client all of the buys you plan to make on their behalf.

4 **Broadcast Media Plans** are used to make detailed plans of spot tv, cable, and radio ads

for a client media campaign. Broadcast plans can be created for any broadcast month and can contain buys for dozens of different stations.

5 **Print Media Plans** are used to make detailed plans for space buys in magazines, newspapers, billboards, and other print media. Print plans can be created by day, week, month, or year.

6 **Insertion/Broadcast Orders** take buy details from estimates and plans to create orders for media vendors. Media orders can also be added directly, bypassing the media estimate and media plan steps. They update jobs and tasks, and are the start of the job costing and billing process.

7 The **Media Traffic** window lists space reservation deadlines and dates for materials due by week for the next four weeks.

8 The **stations** table lists media stations and their times and programs. Both are used on broadcast media plans and orders.

9 The **publications** table lists media publications and their space buy details (such as ad size). Both are used on print media plans, media estimates, and insertion orders.

10 The optional **Media Billing Goals** window lets you plan a year's worth of billings by type of media (e.g., broadcast, interactive, etc.) for all clients. Media analysis reports will compare actual media billing with these goals.

Media Work Flow

TV / RADIO / CABLE

1.
Add stations, programs, and client contract rates

2.
Add broadcast media plan

3.
Add media buys for broadcast plan

4.
Print the broadcast media plan for review

5.
Make revisions, then print the broadcast media plan for client approval

6.
Print station's broadcast worksheet

7.
Make broadcast orders

8.
Pre-bill the broadcast orders or create a Media billing

MAGAZINES / NEWSPAPERS

1.
Add publications, ad sizes, and client contract rates

2.
Add print media plan

3.
Add space buys for print plan

4.
Print the print media plan for review

5.
Make revisions, then print the print media plan for client approval

6.
Make insertion orders

7.
Pre-bill insertion orders or create Media billing

INTERACTIVE

1.
Add media companies and standard, client contract rates

2.
Add interactive media estimate

3.
Print the interactive media estimate for client review

4.

Make revisions, then print the final media estimate for client approval

5.
Generate the interactive media orders from the estimate

6.
Pre-bill the interactive orders or create a media billing

OUTDOOR

1.
Add media companies and standard, client contract rates

2.
Add outdoor media estimate

3.
Print the outdoor media estimate for client review

4.

Make revisions, then print the final media estimate for client approval

5.
Generate the outdoor media orders from the estimate

6.
Pre-bill the outdoor orders or create a media billing

Media Calendar

The Media Calendar window is a useful tool for managing media. Media calendar entries can be entered at any time to help users remember important media-related dates, such as client presentations, vendor meetings, conferences, and planning sessions. Double-clicking on any date in the Media Calendar window will open the Day-at-a-Glance window. This special window shows a listing of all the calendar entries for the selected date with their priority level conveniently color coded. To view all the details of a calendar entry, just double-click on it.
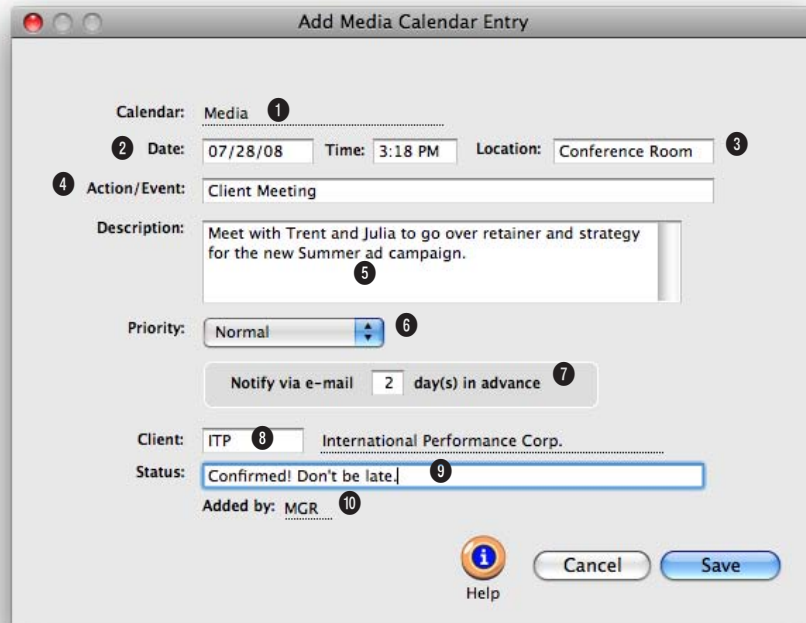
Media calendar entries keep track of important media dates. Tickler entries can be scheduled for any future date and can be automatically e-mailed when they're due.

1 Use the **calendar** pop-up menu to choose which calendar to add the media calendar entry for.

2 **Date** and **time** tells when the media event will happen.

3 **Location** describes where the media calendar entry will happen.

4 The **action/event** is a short description of the media event. It will appear on the Media Calendar window, so it should be meaningful to other users.

5 Use the **description** field to further describe the details of the media action/event.

6 You can determine the importance/urgency level of the media event using the **priority** pop-up menu. In the Day-at-a-Glance Calendar, each media event will be designated as high, normal, or low priority with a colored icon (red for high, yellow for normal, and green for low) so users can easily see the priority level.

7 Specify an automatic lead time warning e-mail in days prior to a media action/event.

8 A media calendar entry can be added for any client.

9 A **status** can be assigned to the media calendar entry.

10 The **added by** field shows the initials of the person who added this media calendar entry.

Media Calendar

Previous	Next	Add	Print			Help

find date: 08/02/08   [Find]   show today ❹   Show: Media

Media Department   August ⌄   2008 ⌄ ❺   M = Mat Due / S = Space Close

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 Client HSA planning meeting 9:30 in Board Room	2
3	4	5 BAC Media Estimate Approval	6	7 Client NEG planning meeting 2:00 @ Westmore building	8	9
10	11 Client FOO planning meeting @ 1:00 in Conference Room	12	13	14	15 M/50003 (see Sara Miller for details)	16
17	18 M/50004 (See Sara Miller for details)	19	20 M/50005 (See Sara Miller for details)	21	22	23
24	25	26 Client ANN Media Estimate Approval due	27	28 Strategy meeting for entire department @ 11:00 in Board Room	29	30
31						

The Media Calendar keeps your media staff informed by letting them see at-a-glance what important media events are fast approaching.

1 Use these toolbar buttons to scroll through the **previous** and **next** months of the media calendar.

2 You can create a media calendar entry by clicking on the **add** button.

3 To get a hard-copy printout of the media calendar, click on the **print calendar** button.

4 Enter a date here to **find** media calendar entries for a specific date. To jump to today's

media calendar entries, click on the **show today** link.

5 Use the **month** and **year** pop-up menus to choose which month of the media calendar you want to view. The media calendar allows you to create entries for three years.

6 Click on a date in the Media Calendar window to open the Day-at-a-Glance Calendar. This window will allow you to view the details of a media calendar entry, as well as add new entries.

Media Briefs (Campaigns)

A media brief is a worksheet that the media department can use to define and document the media process your agency follows to purchase media. It helps outline what needs to be accomplished by the media purchased; they focus on what needs to be done to start buying media; and track the necessary, minute details of the media buying process. The media brief can be printed with all its important planning details to be distributed to the AEs and clients.
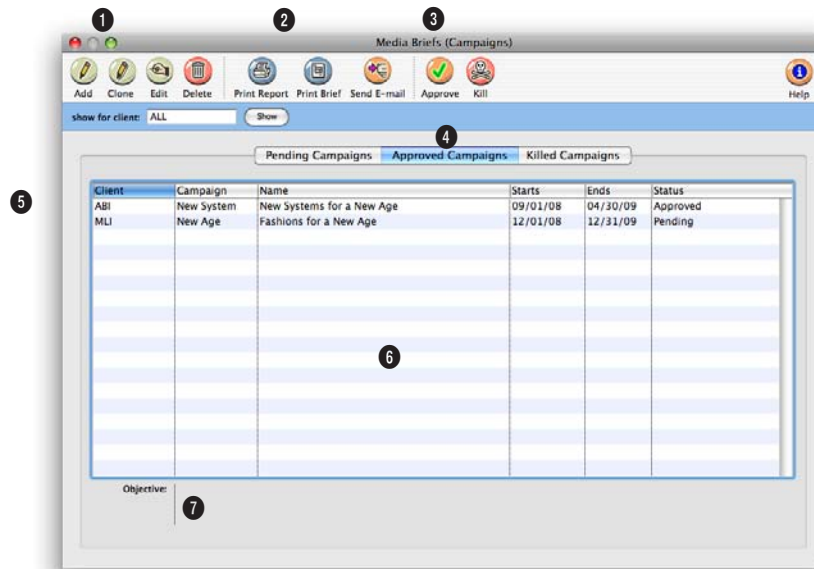
Use media briefs to keep the media department and the AE's on the same page about media planning, ordering, targeting audience, budget, etc.

1 Media briefs can be easily added, cloned, edited, and deleted. To add a new media brief, click on the **add** button. Or use the **clone** button to clone a media brief into a new one. Cloning copies all of the details from an existing media brief, then lets you edit it. To change the media brief's details (i.e., target group, objective, media budget, etc.), click on the **edit** button. Media briefs are flexible so they can be edited at any time. To delete a media brief, click on the **delete** button.

2 To print media reports, click on the **print reports** button. To print a hard-copy printout of the media brief, click on the **print brief** button.

3 Click on a tab pane to switch between pending media briefs, killed media briefs, and approved media briefs.

4 To **find** a media brief, enter a client code here.

5 Media briefs are listed in order by client. You can change the sort order by clicking on any of the column headings.

6 Media briefs are displayed with their client code, campaign ID number, campaign name, start date, end date, and status. Double-click on a campaign to view its details.

7 The **objective** for a selected media brief appears here for reference.

Add a media brief to keep track of all your important details (i.e., target age, media schedule, supporting exhibits, etc.) for a campaign in one easy to find place.

1 Each media brief is entered for one **client** only.

2 The **campaign ID code** is usually a combination of the client code and a number.

3 The **campaign name** should briefly describe the campaign.

4 The **start date** and **end date** note when the campaign was opened and when it will close.

5 The **media rep** is the person responsible for planning and buying this campaign's media.

6 Campaigns can be given an optional **AE**. Custom reports can analyze campaigns by AE.

7 The **added by** initials are the person who added this campaign.

8 An **objective** can be added to explain the primary goal of this campaign. It appears in the Media Brief window so it should be clear and meaningful to other users.

9 Use the **details** pop-up menu

to enter in the details for the campaigns target age, target gender, target occupation, target lifestyle, media recommendations, media schedule, and supporting exhibits.

10 A media **budget** can be entered for the campaign. It is broken out by media type (i.e., broadcast, cable, radio, etc.).

11 An optional **status** can be used to track campaigns from start to finish using the same Status Table as jobs.

Media Estimates
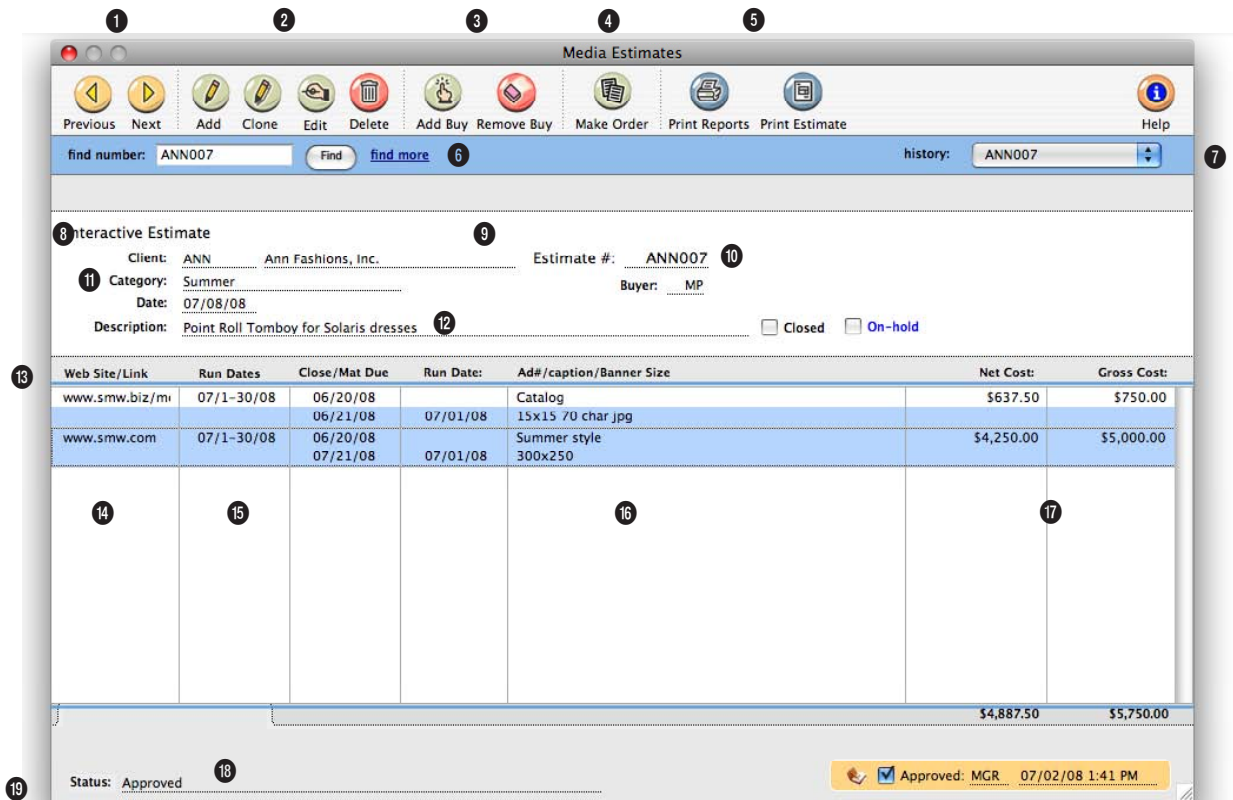
The media estimate provides a simple way to show clients how and where their ads will be placed. There's no limit to how many media estimates you can add for a client.

1 Use these toolbar buttons to scroll through the **previous** and **next** media estimates.

2 Media estimates can be easily added, cloned, edited, and deleted. To add a new media estimate, click on the **add** button. Or use the **clone** button to clone a media estimate into a new one. Cloning copies all of the details and buys from an existing media estimate, then lets you edit it. To change the media estimate's key details (i.e., client, approvals, date,

commission, etc.), click on the **edit** button. Media estimates are flexible so they can be edited at any time. To delete a media estimate, click on the **delete** button.

3 The media estimate is incomplete without media buys. The buys indicate exactly which ads are running on each publication. A single media estimate can contain one or many media buys from one or many different publications. To add a media buy to the media estimate, click

on the **add buy** button. Media buys can be deleted at any time before they are ordered (that is, an insertion order has been created for it). To remove a media buy, click on the **remove buy** button.

4 Insertion orders can be created automatically from your media estimate by clicking on the **make order** button. You can make an insertion order for one selected space buy, or for all space buys on the media estimate. One insertion order will

A media estimate is added in two parts, much like adding a job ticket. First, open the new media estimate, which includes the estimate number, client, campaign name, and description. Next, add media buys for each time an ad will run for this estimate.

be created for each publication.

5 To print media reports, click on the **print reports** button. To print a hard-copy printout of the media estimate, click on the **print estimate** button.

6 Enter a media estimate number here to **find** a media estimate. Or use the **find more** link to find media estimates by sequence, number, client, description, date, or campaign.

7 Use the **history** pop-up menu to jump to a previously viewed media estimate.

8 A media estimate is opened for only one **client**. This would be the client who will be responsible for authorizing these media buys.

9 Media estimates are numbered automatically by client, like job tickets. The **estimate number** is the combination of the client number and its next estimate number. You can enter any kind of estimate number you like.

10 A media estimate can be

marked as **closed** after its buys have been ordered. Placing a media estimate **on-hold** makes it inactive, but keeps it open for future use. Closed and on-hold orders don't appear on media status lists and traffic reports.

11 **Category** is the media kind that has been selected for the media estimate's vendor. It is used on some media reports to group media estimates together.

12 The **description** can contain any kind of notes, specifications, objectives, or strategies that should appear on the printed media estimate. The description is changed by clicking on the Edit button.

13 A media estimate can contain dozens of individual buys, which represent different dates in which an ad will run. The column headings for media buys are customizable—each media estimate can have different labels, for flexibility. They can be changed by clicking the edit button.

14 The publication code indicates from which magazine,

newspaper, outdoor, or other media this buy is being ordered.

15 The issue date shows when the ad will run.

16 The **ad number**, **caption**, and **size** describe the ad space that will be ordered from this estimate. These details appear on the printed insertion order and the client's media billing.

17 **Gross cost** is the amount you're charging the client for this ad. The **commission** is copied from the client, and is used to calculate the ad's net cost. **Net cost** is the amount you'll pay the publication for the ad.

18 If the selected media buy has already been ordered on an insertion order, the IO number, date, and actual order amount will appear here for reference.

19 Media estimates can be tracked from start to finish by status on reports. The **status** is optional, and is completely customizable. It is not related to the job production/billing status codes.

Broadcast Media Plans
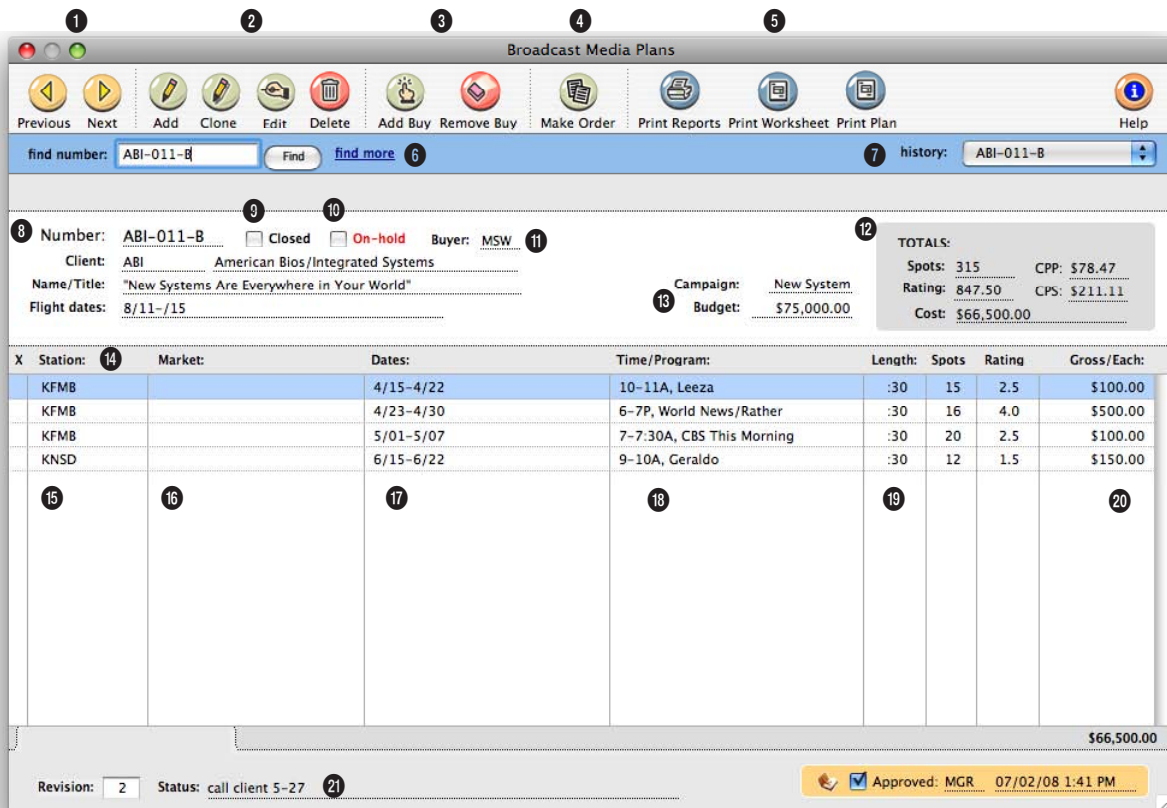
Most of the information entered on a broadcast media plan is included on the printed broadcast plan that the client will approve. It can be revised and reprinted many times.

1 Use these toolbar buttons to scroll through the **previous** and **next** broadcast media plans.

2 Broadcast media plans can be easily added, cloned, edited, and deleted. To add a new broadcast media plan, click on the **add** button. Or use the **clone** button to clone a broadcast media plan into a new one. Cloning copies all of the details and buys from an existing broadcast media plan, then lets you edit it. To change the broadcast media plan's key

details (i.e., client, approvals, flight dates, commission, etc.), click on the **edit** button. Broadcast media plans are flexible so they can be edited at any time. To delete a broadcast media plan, click on the **delete** button.

3 The broadcast media plan is incomplete without spot buys for times and programs. A separate spot buy should be added for each time or program during which the ad will run. To add a broadcast buy to the broadcast media plan, click on

the **add buy** button. Broadcast buys can be deleted at any time before they are ordered (that is, a broadcast order has been created for it). To remove a broadcast buy, click on the **remove buy** button.

4 To print media reports, click on the **print reports** button. Click the **print worksheet** button to print the Broadcast Worksheet which shows the plan's buys in detail by station and the total number of spots, cost, and

Broadcast media plans can be created for many kinds of radio, television, cable, or even Internet-based media buys. A broadcast media plan is similar to a job ticket: it is opened for one client, has a number to track it, can be changed many times as needed, and printed for a client's approval.

rating for each station and for the entire plan. To print a hard-copy printout of the broad-cast media plan, click on the **print plan** button.

5 Broadcast orders can be created automatically from your broadcast media plan by clicking on the **make order** button. You can make a broadcast order for one selected broadcast buy, or for all broadcast buys on the broadcast media plan. One broadcast order will be created for each station.

6 Enter a broadcast media plan number here to **find** a broadcast media plan. Or use the **advanced search** link to find broadcast media plans by sequence, number, client, name/title, start date, or campaign.

7 Use the **history** pop-up menu to jump to a previously viewed broadcast media plan.

8 Each broadcast media plan is tracked by a **media plan number**. Media plans are numbered automatically by client. Each client has its own numbering sequence for easy tracking. A media plan's number can't be changed. Broadcast media plans are opened for a single **client**. The client number will be copied from the media plan to broadcast orders and, eventually, to media invoices. The media plan's **name/title** appears here for reference and is usually

a brief description of the plan's objective. The broadcast plan's **flight schedule** is customizable. These are the days on which the spots will run.

9 A broadcast media plan can be marked as **closed** after its buys have been ordered.

10 Placing a broadcast media plan **on-hold** makes it inactive, but keeps it open for future use. Closed and on-hold orders don't appear on media status lists and traffic reports.

11 The **buyer** initials are copied as the person adding the media plan, but can be changed.

12 The broadcast media plan's total **spots**, **rating**, **cost**, and other summary totals appear here for easy reference. The **CPP** is the cost per rating point and the **CPS** is the cost per spot.

13 The **campaign** code is displayed here for easy reference. The media plan's optional **budget**, if entered, appears here.

14 The broadcast media plan's spot buys are listed by **station**. Each spot buy contains a station name, the time/program name during which the spots will be running, the length of each spot, the number of spots, total rating points, and the spot buy's total gross cost. Double-

clicking on a spot buy displays its complete details.

15 The **station** is who you bought the broadcast buy to run during a time or program.

16 **Market** shows where the broadcast buy's spots will run.

17 **Dates** shows when the broadcast buy's spots will run.

18 The **time/program** field contains the name of the time or program the broadcast buy will run.

19 **Length** describes how long the broadcast buy's spots will run. **Spots** shows the number of times the broadcast buy will run during the time or program. **Rating** shows what the time or program's rating is.

20 **Gross/Each** shows how much each spot run for the broadcast buy will cost.

21 The **status** field can be used to track broadcast media plans. It appears here for reference, but it can be edited in the Edit Broadcast Media Plan window.

Print Media Plans
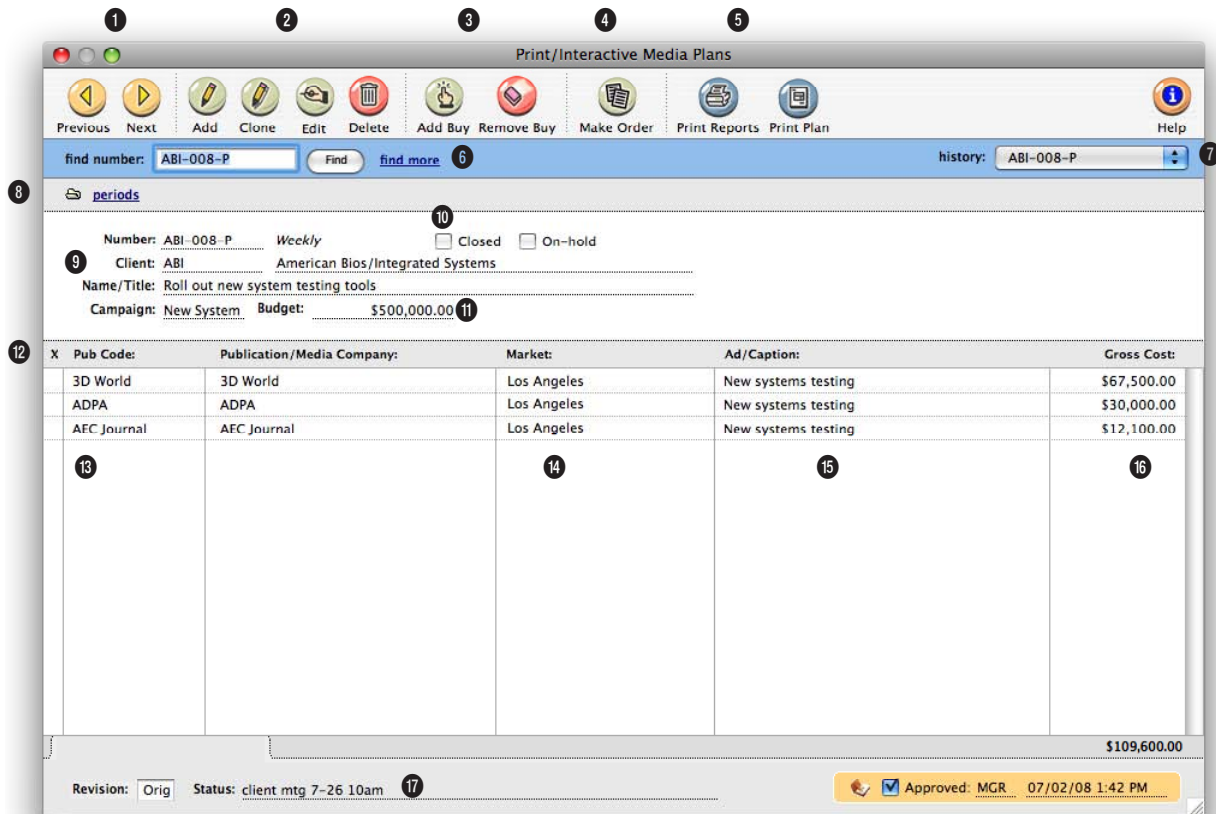
Print media plans can be created for three kinds of periods: daily (for newspapers), weekly (for newspapers, journals, etc.), and monthly (for magazines).

1 Use these toolbar buttons to scroll through the **previous** and **next** print media plans.

2 Print media plans can be easily added, cloned, edited, and deleted. To add a new print media plan, click on the **add** button. Or use the **clone** button to clone a print media plan into a new one. Cloning copies all of the details and buys from an existing print media plan, then lets you edit it. To change the print media plan's key details (i.e.,

campaign, start date, end date, approvals, kind, etc.), click on the **edit** button. Print media plans are flexible so they can be edited at any time. To delete a print media plan, click on the **delete** button.

3 The print media plan is incomplete without buys for ad space. Space buys indicate exactly which ads are running on each publication during each of the plan's twelve months, weeks, etc. One print media plan can contain space buys for

dozens of different publications, or many buys for the same publication. To add a space buy to the print media plan, click on the **add buy** button. Space buys can be deleted at any time before they are ordered (that is, an insertion order has been created for it). To remove a space buy, click on the **remove buy** button.

4 Insertion orders can be created automatically from your print media plan by clicking on the **make order** button. You can

The print media plan is incomplete without buys for ad space. One print media plan can contain space buys for dozens of different publications, or many buys for the same publication.

make an insertion order for one selected space buy, or for all space buys on the print media plan. One insertion order will be created for each publication.

5 To print media reports, click on the **print reports** button. To print a hard-copy printout of the print media plan, click on the **print plan** button.

6 Enter a print media plan number here to **find** a print media plan. Or use the **find more** link to find print media plans by sequence, number, client, name/title, start date, or campaign.

7 Use the **history** pop-up menu to jump to a previously viewed print media plan.

8 Use the **specifications** link to view the print media plan's details. Use the **vendor info** link to view or edit the vendor's address. Use the **delivery info** link to enter special delivery instructions for the print media plan. Use the **periods** link to view or edit the buy periods for the print media plan.

9 Print media plans are opened for a single **client**, just like a job ticket. The client number will be copied from the media plan to insertion orders and, eventually, to media invoices.

The **name/title** is a brief description of the plan's objective, market, or product. It appears on the printed media plan, so clients see it.

Each print media plan is tracked by a unique **media plan number**. For easy tracking, each client has it's own numbering sequence. The media plan number is a combination of the client account number and its special media plan number. A media plan's number can't be changed.

The print media plans kind appears here for reference. Print media plans can be created for three **kinds** of periods: daily (for newspapers), weekly (for weekly newspapers, trade journals, and weekly periodicals), and monthly (for magazines). Daily print media plans let you plan buys for a single seven-day period. Weekly print media plans let you buy space for any twelve periods. Monthly print media plans let you place ads for up to twelve months.

10 A print media plan can be marked as **closed** after its buys have been ordered. Placing a print media plan **on-hold** makes it inactive, but keeps it open for future use. Closed and on-hold orders don't appear on media status lists and traffic reports.

11 The **campaign** and **budget** are displayed here for easy reference. The optional budget can be used to show the amount expected for the total of the print media plan's space buys.

12 The media plan's space buys are listed here by publication code. Double-clicking on a space buy displays its complete details, including the day, week, or month in which the ads will run.

13 The **pub code** and **publication** indicated the publication from whom you're buying the space to run the ad.

14 **Market** shows where the space buy's ads will run.

15 The **ad number/caption** identifies the ad on the printed media plan, insertions orders, and media invoices. Any kind of description text or ID code can be used.

16 The ad's **gross cost** (i.e., the amount the client will pay, including your commission) appears here for reference. The ad's net cost will be calculated using the gross cost and plan's media commission.

17 An optional **status** can be used to track print media plans from start to finish using the same Status Table as jobs.

Insertion/Broadcast/Interactive/Outdoor Or-
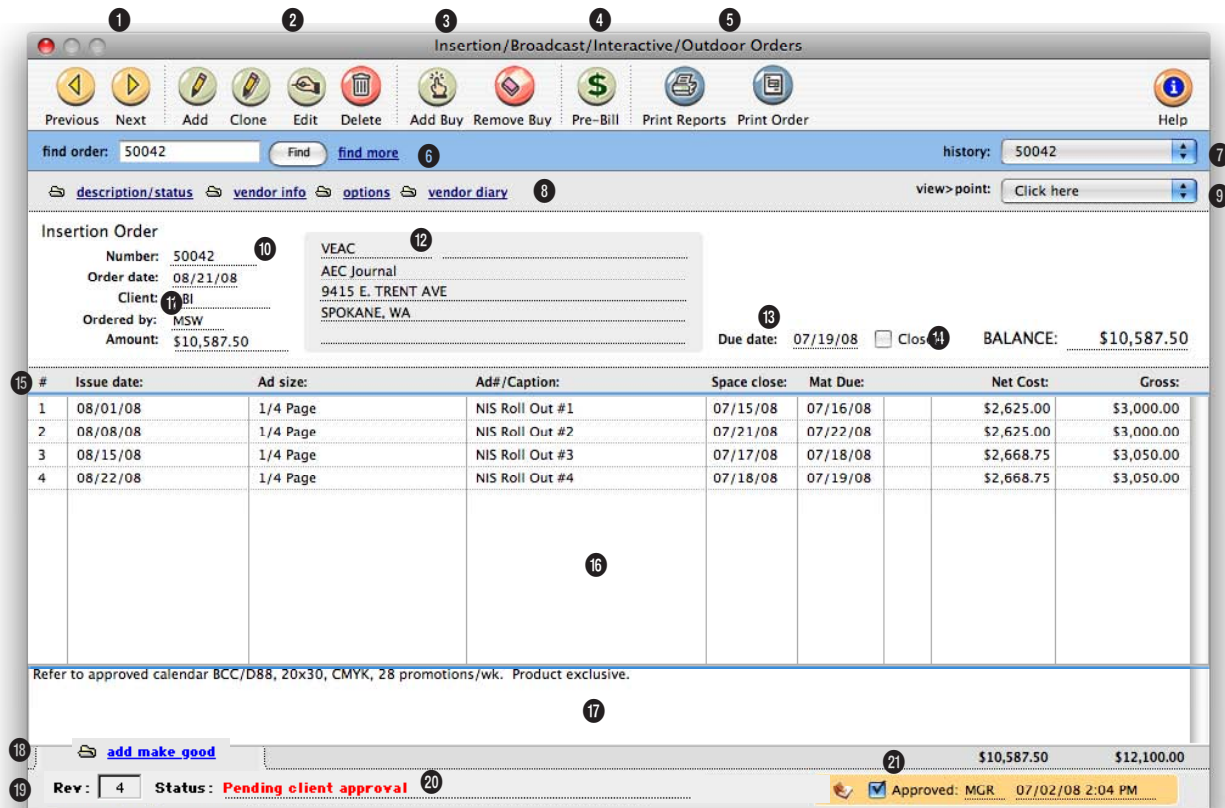
Orders can be revised has many times as you want. To make the first revision and start the revision counter, simply enter a "1" in the Description/Status window.

1 Use the **previous** and **next** buttons to scroll through insertion and broadcast orders.

2 Insertion and broadcast orders can be easily added, cloned, edited, or deleted. Click the **add** button to add a new insertion order. (To add a broadcast order, go to Edit > Add > Broadcast Order). Or click on the **clone** button to make an exact copy of an existing order. Click the **edit** button to edit the order's key details, such as the vendor, campaign,

or brand. Click the **delete** button to delete an order. Once an insertion or broadcast order has been invoiced by the vendor or pre-billed to the client it can't be deleted—even if it was only partially invoiced. Like jobs, this feature prevents billable orders from being inadvertently deleted and, therefore, not billed. Always let Clients & Profits X automatically number the next media order to avoid confusion from using the numbers of deleted orders over again.

3 Click the **add buy** button to add new amounts to an order. The **remove buy** button deletes one or more selected costs from an order. Only line items that haven't been invoiced by the vendor or pre-billed to the client can be deleted. Once a line item is removed, it is gone forever: its net cost and gross amounts are deducted from the job task permanently. However, if needed, the same line item can be added back to the order later.

Insertion orders and broadcast orders have separate preferences. The agency name, address, disclaimer, auto-numbering, copies to names, and logo can be different. (This is especially useful for in-house agencies that need to maintain a separate identity from the corporation in order to get agency discounts.)

4 Any insertion or broadcast order can be pre-billed using the **pre-bill** button. Pre-billing automatically creates an invoice for the order's gross amounts and shows the job and task like any other invoice. The pre-billing invoice is unposted, so it can be proofed, posted, and then printed with other invoices. There are two options available when pre-billing an order. The show totals only option combines all of the order's amounts together, so that the invoice shows only one billing amount. The show item-by-item detail creates a separate billing amount for every line item on the order. Also, the order's billing can be added to an existing unposted pre-billing invoice by entering the number of the existing pre-billing invoice into the pre-bill dialog box.

5 The **print reports** and **print order** buttons are used to print insertion and broadcast order reports and forms.

6 If you know the insertion or broadcast order number you want to find, simply enter the number into the **find order** field. Use the **find more** link to find one or more insertion or broadcast orders by sequence, vendor, number, date, or job.

7 The **history** pop-up menu can be used to jump to a previously viewed insertion or broadcast order.

8 Use these links to edit the order's description/status, vendor information, or options and to view the vendor diary. The **description/status window** can be used to edit the order's details, such as the campaign, brand, or status. The **vendor information window** can be used to customize the vendor's name and address on this insertion or broadcast order only. The **options window** contains the copies to names and disclaimer for the insertion or broadcast order. The **vendor diary window** can be used to view, add, or edit diary entries for the insertion or broadcast order's vendor.

9 Use the **view>point** pop-up menu to view the order's invoices.

10 Every order has a unique **number**. New orders are numbered automatically, but custom, user-defined numbers can be entered instead.

11 The **order date** is the date the insertion or broadcast order was added. The **client** number does not show on the printed order; there is an option in Preferences to show the client name. The **ordered by** field shows the initials of the person who added the order. Insertion and broadcast orders can be printed in batches by user. The **amount** is the total amount of the order's line items.

12 The vendor's name and address are copied to the order, but can be changed. This lets you send an insertion or broad-cast order to a different address for the same vendor. An order can include only one **vendor**; if you're buying something from multiple vendors, each vendor gets its own insertion or broad-cast order.

13 The **due date** shows when the buys are due to be delivered. The **balance** amount shows the amount remaining on the order that has not been invoiced to vendor invoices. When the insertion or broadcast order is closed, the balance amount will automatically change to $0.00.

14 The order will be **closed** automatically when applied to a payable for the full balance due. If an order needs to be closed for any reason, click on the closed box.

15 The insertion or broadcast order's buys are listed here by **line number**. Double-clicking on a media buy opens the Edit Media Buy window.

16 Some of the media buy's details are listed here for easy reference. For insertion orders, the media buy's issue date, ad size, ad#/caption, space close date, materials due date, net cost, and gross cost will appear. For broadcast orders, the media buy's broadcast month, market, ad name, product, materials due date, net cost, and gross cost will appear.

17 A lengthy **description** pro-vides a detailed explanation of the order to the vendor.

18 Use the **make goods** link to add a make good to this inser-tion or broadcast order. Make goods are compensation for ads that either never ran or ran incorrectly.

19 The order's current **revision** number increments auto-matically each time someone edits the order. To start the automatic revision numbering, a "1" must be entered into the revision box in the specifica-tions window.

20 The **status** is user-defined note that describes the order's current progress and appears on the printed order. Insertion/ Broadcast Order reports can be printed showing only orders with a certain status (i.e., on-hold, change order, etc.).

21 If an order has been **ap-proved**, the approver's initials and date appear on the Inser-tion/Broadcast Order window. Once approved, insertion and broadcast orders can't be edited. Only the user who ap-proved the order can unapprove the order.

Adding Broadcast Orders

Radio, cable, and broadcast tv spots ordered on behalf of a client should be tracked with broadcast orders. They can be created one-by-one or from broadcast media plans.

1 The **number** identifies a broadcast order on windows, reports, and forms. Broadcast orders are numbered automatically when added or when saved, based on your preferences. Or, you can number your orders manually.

2 Use the **template** pop-up menu to select a template. Choosing a template copies the template's default details to the new broadcast order.

3 An order has only one **vendor** which is usually the company

that owns the station (or it might be the station itself). The vendor's name and address appear on the printed broadcast order, but can be customized on each order.

4 The **order date** is the date on which the order was added. It appears on the printed broadcast order. **Ordered by** is the initials of the person who added the insertion order. Later, broadcast orders can be printed in batches by these ordered by initials. The **commission** is

copied from the vendor, and is used to calculate the buy's net cost.

5 Every insertion order needs a **job** and **task** for accurate cost accounting. The broadcast order's cost will update the job task's Net POs total.

6 The **flight dates** are when the programs will run.

7 **Campaign** and **brand** are optional fields that are used by media analysis reports.

Once the Add Broadcast Order window is saved, you can add media buys to the broadcast order. Media buys contain the specific details about each spot that will run on the broadcast order. A separate media buy should be added for each combination of run dates, times, and programs. A broadcast order can have dozens of media buys on it.

8 The body of the broadcast order is completely customizable. The standard field labels are designed for broadcast orders. The default labels are **broadcast month**, **ad name**, **market**, and **product**. Information added for these user-fields appear on the printed broadcast order.

9 The **materials due date** is used by traffic reports and applies to first spot on the broadcast order. It can be customized for each media buy.

10 The **description** field is a long text block. The label itself is customizable for flexibility. Any kind of notes or details can be entered here. This text appears in the heading of the printed broadcast order.

11 The **special instructions** field provide a space for details. It prints on the broadcast order below the line items.

12 The **Media Buyer** and **Media Rep OK** fields create approval lines on the printed broadcast or order along with the **rep instructions**.

Adding Insertion Orders

Insertion orders are essential for accurate job costing. They allow media costs to be committed to a job before the publication's invoice is posted.

1 The order **number** identifies an insertion order on windows, reports, and forms. IOs are numbered automatically when added or when saved, based on preferences, or manually.

2 Use the **template** pop-up menu to select a template. Choosing a template copies the template's default details to the new broadcast order.

3 An IO has only one **vendor**. It is usually the company that owns the publication (or it

might be the publication itself).

4 The **order date** is the date on which the insertion order was added. It appears on the printed insertion order.

5 **Ordered by** is the initials of the person who added the insertion order. Later, insertion orders can be printed in batches by ordered by initials.

6 Every insertion order needs a **job** and **task** for accurate cost accounting. The insertion's

cost will update the job task's Net POs total.

7 The **publication** name is copied from the Publications table, which links the pub's ad sizes with insertion orders.

8 The **campaign** code can be used to categorize media expenses. The **brand** name helps to identify the product line being advertised. Both are optional.

9 The **issue date** shows the

Any kind of ad space ordered on behalf of a client should be tracked with insertion orders. An insertion order can have one or dozens of different media buys for one vendor. Each media buy can specify a different ad to run, another set of run dates, or a special space buy for a certain ad and will appear as a separate line on the printed order.

week, month, or period of time each media buy runs. The **ad/caption** describes the specific advertisement that's being run for this space buy. The **ad name/size** is a combination of the ad/caption and ad size fields, but can be changed. It appears on media billings.

10 **Space close** is the date on which you must place this order with the publication.

11 **Materials due** is the date on which the ad's film, disk, or other materials must reach the publication.

12 **Position** is a customizable text field that can store notes or special instructions that appear on the printed insertion order.

13 **Gross cost** is the amount you're charging the client for this ad. The **commission** is copied from the client, and is used to calculate the ad's net cost. **Net cost** is the amount you'll pay the publication for the ad.

14 The **bill net**, **not gross** option lets you pass the ad's true cost along to the client, without any agency commission.

Adding Interactive Orders

Interactive orders can be used to buy advertising space on web sites, digital kiosks, point-of-sale locations—anything that's electronic.

Internet Advertising is are ads that appears on websites. As the on-line population rapidly grows, so does the placement of ads on the world wide web. One advantage it has over traditional advertising is that enables clients to interact with the advertisement, so with a mouseclick anyone on-line can get more information about a product, subscribe for news and updates, or purchase it right then and there.

1 The order **number** identifies an interactive order on windows, reports, and forms. Orders are numbered automatically when added or when saved, based on preferences, or manually.

2 Use the **template** pop-up menu to select a template. Choosing a template copies the template's default details to the new order.

3 An interactive order has only one **vendor**, which is the company that owns web site or network.

4 The **order date** is the date on which the interactive order was added and appears on the printed order.

5 **Ordered by** is the initials of the person who added the insertion order. Later, orders can be printed in batches by these initials.

6 Every interactive order needs a **job** and **task** for accurate cost accounting. The order's cost will update the job task's Net POs total.

Internet ads also provides advertisers with an opportunity to precisely target its audience, enabling them to deliver advertisements that are customized to each consumer's particular interests and tastes.

7 The **website/network** name is copied from the Publications/ Media Companies table, which links the media company's ad sizes with interactive orders. The **run dates** show the days, weeks, or months the interactive ad will appear on the site. The **ad/caption** describes the specific advertisement that's being run for this space buy. The **banner size** is the size of the ad in pixels. To see a list of ad sizes, leave the banner size empty then press tab. A lookup list will appear listing the media company's ad sizes that have been added into Publications/Media Companies table. You can then choose an ad size from the list or type in your own size. The **linking URL** indicates to the media company the web page should be opened when a viewer clicks on the ad.

8 The **campaign** code can be used to categorize media expenses. The **brand** name helps to identify the product line being advertised. Both are optional.

9 The **# impressions** shows the number of time the ad will be seen by readers per month. It is used to calculate the ad's cost per thousand (CPM).

10 **Space close** is the date on which you must place this order with the media company. **Materials due** is the date on which the digital artwork must reach the media company.

**11** **File size** the media company how large the digital artwork will be when it is sent.

12 Use **special instructions** to

note any unique information or specific details about how this interactive ad should be run. They appear on the printed interactive order.

13 **Gross cost** is the amount you're charging the client for this ad. The **commission** is copied from the client, and is used to calculate the ad's net cost. **Net cost** is the amount you'll pay the publication for the ad.

14 The **bill net**, **not gross** option lets you pass the ad's true cost along to the client, without any agency commission.

Adding Outdoor Orders
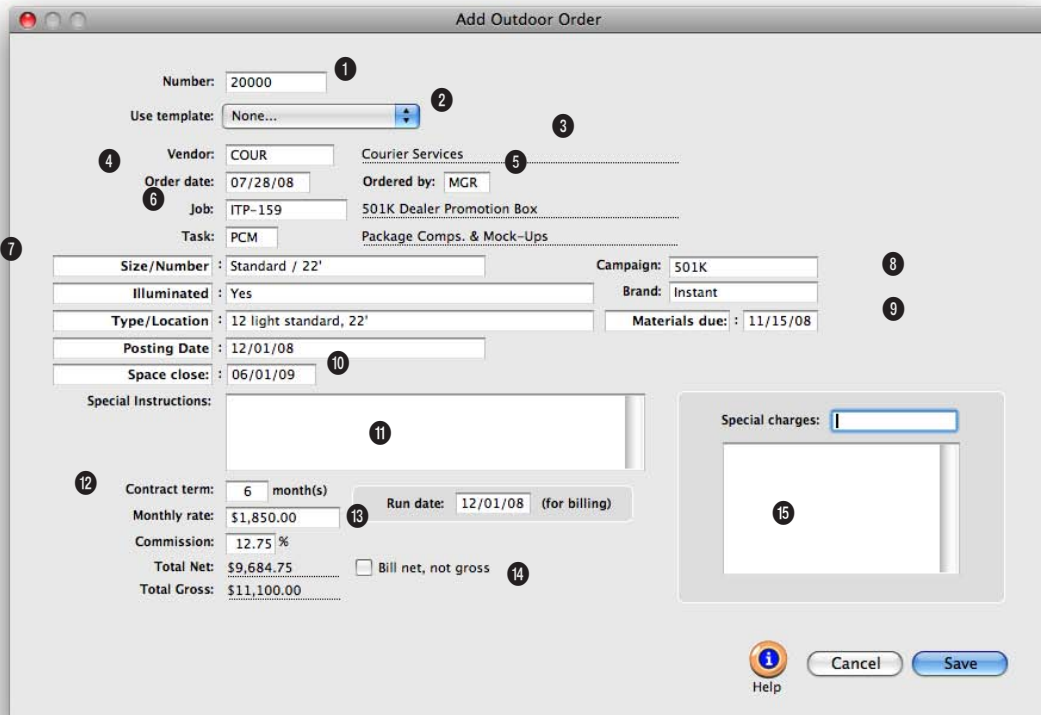
Outdoor media orders are used to place any kind of out-of-doors advertising, such as billboards, mass transit signage, kiosks, building walls, and more.

Outdoor advertising can reach a lot of people and build a strong identity within a local market. Each board is assigned to a location, which displays it's message to a percentage of the population. You can project your message on one or numerous boards, to reach a total number of impressions that equal a percentage of the area's population.

1 The order **number** identifies an interactive order on

windows, reports, and forms. Orders are numbered automatically when added or when saved, based on preferences, or manually.

2 Use the **template** pop-up menu to select a template. Choosing a template copies the template's default details to the new order.

3 Each outdoor order has only one **vendor**, which is the media company that owns or manages the billboard, signage, etc.

4 The **order date** is the date on which the outdoor order was added and appears on the printed order.

5 **Ordered by** is the initials of the person who added the outdoor order. Later, orders can be printed in batches by these initials.

6 Every outdoor order needs a **job** and **task** for accurate cost accounting. The order's cost will update the job task's Net POs total.

The outdoor locations you buy most often can be added to the Publications/Media Companies table with specifications and rates, which will be copied to new outdoor orders automatically.

7 The **size/number** identifies the specific ad space or location being ordered for this media buy. To see a list of the media company's ad sizes/numbers, leave the field empty then press Tab.

Illuminated indicates whether the outdoor advertisement is lighted and, if so, how many hours it is lit. The **type/location** describes the specific location that this advertisement will appear. **Posting date** shows when the media company will install or present the outdoor ad.

8 The **campaign** code can be used to categorize media expenses. The **brand** name helps to identify the product line being advertised. Both are optional.

9 **Materials due** is the date on which the digital artwork must reach the media company.

10 **Space close** is the date on which you must place this order with the media company.

11 Use **special instructions** to note any unique information or specific details about how this outdoor ad should be presented. These notes appear on the printed outdoor order.

12 **Contact term** tells the media company how long (in months) this outdoor ad will run. It is the rate basis for the ad's cost.

13 **Monthly rate** is the amount you're charging the client for this ad per month. The **commission** is copied from the client,

and is used to calculate the ad's net cost. **Total net** is the amount you'll pay the media company for the placement for the full contract term. **Total gross** is the total amount your client will pay for the ad's entire run.

14 The **bill net, not gross** option lets you pass the ad's true cost along to the client, without any agency commission.

15 **Special charges** are optional additional costs above and beyond the outdoor ad's contract rate. They are one-time charges that are added to the total gross the client will pay. Special charges are commissionable, so the net charge will be added to the orders't total net.

Media Traffic
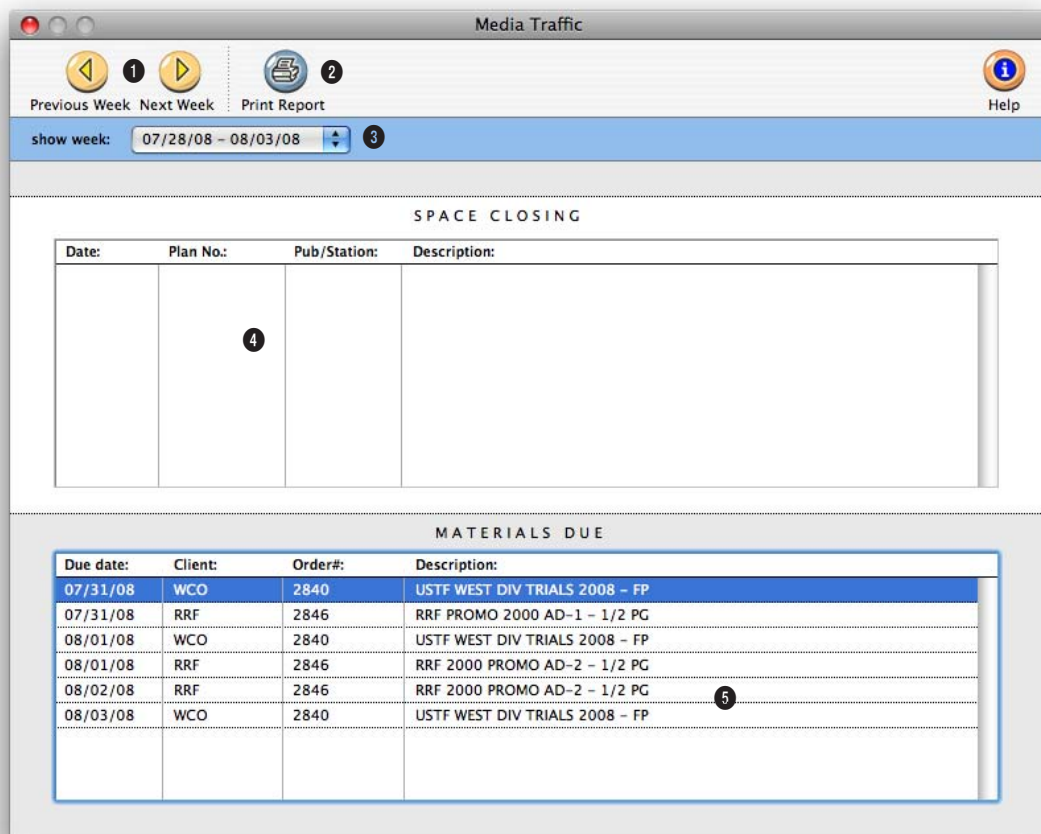
The Media Traffic window gives media planners and buyers a one-stop place to check upcoming deadlines for space closings and materials due.

1 Use the **prev week** and **next week** toolbar buttons to scroll through the four weeks of media deadlines available to be viewed.

2 To print a hard-copy printout of the Media Traffic window, click on the **print report** button.

3 The Media Traffic window can list space closing and material due dates for the next four weeks by using the **show week** pop-up menu. Only one week can be viewed at a time.

4 The **space closing** list shows upcoming space deadlines from broadcast and print media plans. The space closing date can be entered separately for each buy on a media plan.

5 The **materials due** list shows upcoming traffic deadlines from actual insertion and broadcast orders.

Stations

Clients & Profits keeps a detailed table of the stations you use on broadcast media plans. A broadcast media plan is composed of different spot buys for a two-week period. Each program/time is added as a separate spot buy on a broadcast media plan, along with the number of spots that will run each day of the   ight. When you're adding a spot buy, you'll select a station from the Stations lookup list—which links the media buy with the station's programs, times, and rates.
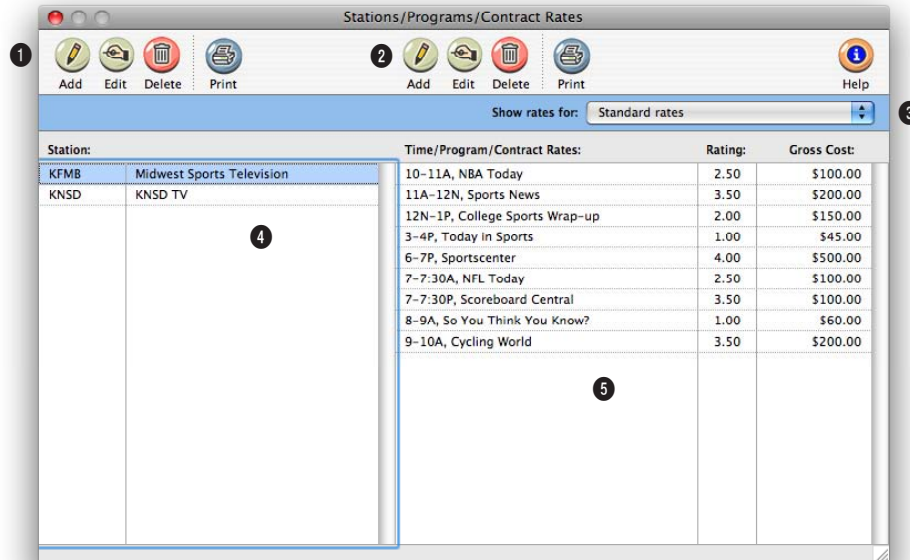
The Stations window shows both your stations (television, radio, and cable) and their programs/times. There's no limit to how many stations and programs you can add.

1 Use the station toolbar buttons to add, edit, and delete TV, radio, and cable stations as well as print a station list.

2 Use the time/program toolbar buttons to add, edit, and delete programs, times, and contract rates for the currently selected station. You can also print a list of programs/times by clicking the Print button.

3 Each station can have dozens of different programs/times. You can set up standard rates

for each program or time slot, as well as special program/rate combinations for each client. When a broadcast media plan is created, the right rate will be copied to the spot buy automatically. Selecting a client from the pop-up menu displays that client's special contract rates. The program/times/rate table needs to be frequently updated as the rates and programs change.

4 Your stations are listed here, sorted alphabetically. Clicking once on a station displays its

programs/times and standard rates. Double-clicking on a station ID opens the Stations window, where you can make changes to its details.

5 The times/programs and standard rates for the selected station are listed here. Double-clicking a time/program record opens the Times/Programs/Contract Rates window, where you can change the spot's details.

Anyone using Clients & Profits can see and update the station's information, including the ad representative's name, address, and phone number.

1 Each station must be associated with a **vendor** in the Vendor table. The vendor and the station can be the same, but must be added separately. One vendor can have many stations.

2 The **station code** is used for sorting and sub-totaling media buys on reports and client invoices, so clients will see it. Each station code must be unique. The code is customizable and user-defined.

3 The station's name and address are entered here and appear on printed media orders.

4 An **ad rep** for the station can be entered here with their phone number, and fax number.

5 The **commission** rate will be copied to broadcast media plans when this station is used.

6 Any notes about the publication can be entered here. They don't appear on media reports.

7 The publication's market can be entered here for future reference.

Publications/Media Companies

Clients & Profits X keeps a detailed listing of the publications you use for media print buying and media companies you use for outdoor advertising. Each pub and media company belongs to a vendor in the Vendor table. One vendor can have dozens of publications, each with its own collection of various ad sizes and rates.
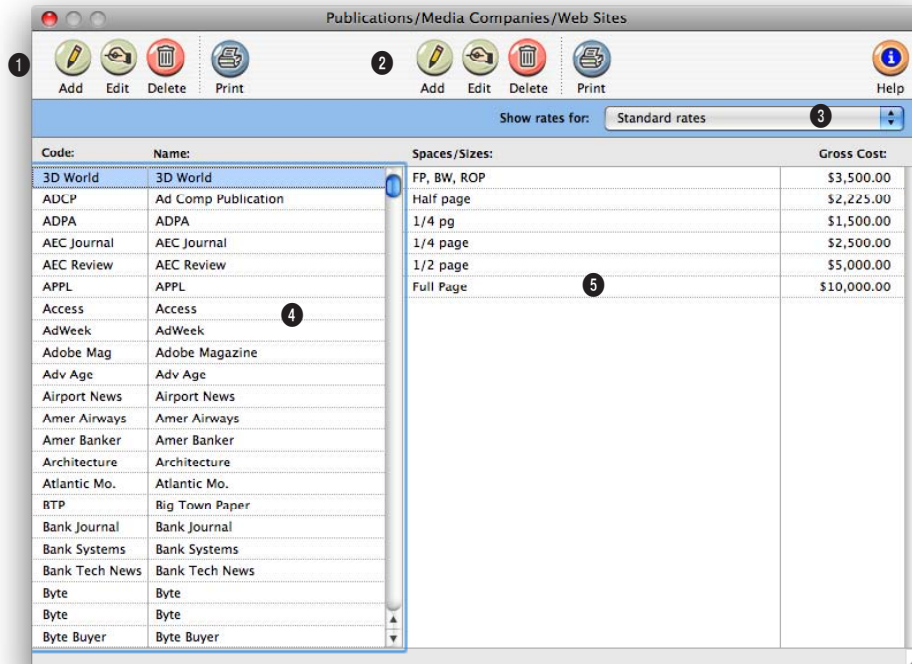
The Publications/Ad Sizes/Media Companies window shows a detailed listing of all the publications and their ad sizes that you use for media print buying.

1 Use these toolbar buttons to **add**, **edit**, and **delete** publications as well as **print** a publication list.
Use these arrow toolbar buttons to change the sort direction the publications are listed in.

2 Use these toolbar buttons to **add**, **edit**, and **delete** ad sizes and contract rates for the currently selected publication. You can also print a list of ad sizes/rates by clicking the **print** button. Use these arrow toolbar buttons to change the sort direction the ad sizes are listed in.

3 A publication can have dozens of **ad sizes/rates**. You can set up standard rates for each ad size, as well as special size/rate combinations for each client. Selecting a client from the pop-up menu displays that client's special contract rates.

4 Your publications are listed here, sorted alphabetically by publication code. To sort the list by publication name, click on the publication heading. Clicking once on a **publication** displays its ad sizes and standard rates. Double-clicking on a publication opens the Publication window, where you can make changes to the publication's information.

5 The **ad sizes** and **standard rates** for the selected publication are listed here by ad size. To sort the list by gross cost, click on the gross cost heading. Double-clicking on an ad size opens the Print Ad Size window, where you can change the ad's details.

Anyone using Clients & Profits X can see and update the pub/media company's information, including the ad representative's name, address, and phone number.

1 Each publication/media company needs to be associated with a **vendor** in the Vendor table. The vendor and the publication/media company can be the same, but must be added separately. One vendor can have many publications.

2 The **publication code** is used for sorting and sub-totaling media buys on reports and client invoices, so clients will see it. Each publication code must be unique. The code is customizable and user-defined.

3 The **commission** rate will be copied to media estimates and print media plans when this publication is used.

4 The publication and media company's name, address, phone number, and fax number are entered here and appear on printed media orders.

5 The publication's issue date, close date, and circulation can be entered here for future reference.

6 An **ad rep** for the publication can be entered here with their phone number. It is optional, but appears on printed media orders.

7 The publication's **market** can be entered here for future reference. The market is copied to orders added for this publication or media company.

8 Any **notes** about the publication can be entered here. They don't appear on media reports.

Make Goods

Make goods are compensation for ads that either never ran or ran incorrectly. There are many different ways a print ad or radio/tv spot can be compromised, providing less value for your client. For example, you ordered for a guaranteed position in a magazine, but the ad actually ran in a different, less desirable place. Or, you placed a radio spot to air during a certain show, but the ad ran during a different program. In these situations, the publication or station will either offer to run the ad or spot again, credit the entire amount of the ad's cost, or issue a partial credit.

Make goods need to be added to the original insertion order or broadcast order so that the shop's job costing is accurate. If make goods aren't entered as they happen, your job costs won't match up with your commitments.

It's the media buyer's responsibility to match the station's affidavits or the publication's tear sheets to verify that the ads or spots that actually ran match what the shop ordered. Any discrepancies needs to be noted on the client's broadcast or insertion orders by adding make goods.

Make goods are simply additional media buys appended to an insertion order or broadcast order after the ads or spots have been run. They're functionally no different from an order's regular media buys—each make good line item includes details about the dates, times, programs, etc. of the affected print ad or radio/tv spot. Make goods will have a negative cost amount if the station/publication is offering a credit; otherwise, free make good ads will have a no cost at all.

When make goods are added, they update the job's commitment totals just like the original order. They appear on media reports just like other media buys. When the station or publication media invoice is added into Accounts Payable, they are reconciled along with the order's original media buys.
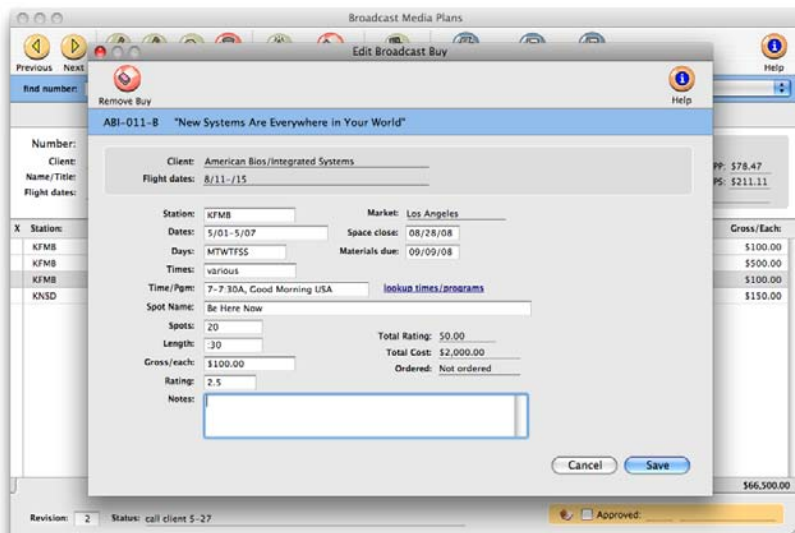
To add a make good for a broadcast order

1 From the Insertion/Broadcast Orders window, find the broadcast order that needs the make good.

Editing a broadcast media buy. Broadcast orders are added, edited, revised, printed, and billed like purchase orders and insertion orders. Dozens of separate media buys can be added for the same station on a broadcast order.

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2 Click once to highlight the media buy wasn't run or run incorrectly.

3 Click the ☐ **add make good** link or choose Edit > Add Make Good.

The Add Broadcast Make Good window opens, prompting you to enter the make good's details. The media buy's details are copied to the make good line item except for the date, time, and program.

4 Enter the dates, days, time, and program for which this make good spot will run.

The dates, days, etc. is based the compensation negotiated with the station.

5 Enter the rate, spots, amounts, and other details for this make good, then click Save.

To add a make good for an insertion order

1 Find the insertion order that needs the make good.

2 Click once to highlight the media buy wasn't run or run incorrectly, then click the ☐ **add make good** link or choose Edit > Add Make Good.

3 Enter the issue date, ad caption, and ad size for which this make good ad will run, based the compensation negotiated with the publication.

4 Enter the space close and materials due dates for this make good, then click Save.

Reprinting the revised broadcast or insertion order

Once the make good is saved, the broadcast or insertion order can be reprinted and faxed to the station, if necessary. For clarity, the reprinted order will show the original media buys plus the make goods.

1 Choose File > Print Orders then follow the prompts.

Media Billing Goals

The Media Group Performance - Trend Analysis report compares actual media spending for each kind of media (e.g., broadcast TV, radio, etc.) with the media department's billing goals. For these reports to work properly, the shop's billing goals for each media kind must be entered in the Media Goals window. Media billing goals, which are based on gross amounts on broadcast and print insertion orders, can be entered for each quarter of the calendar year.
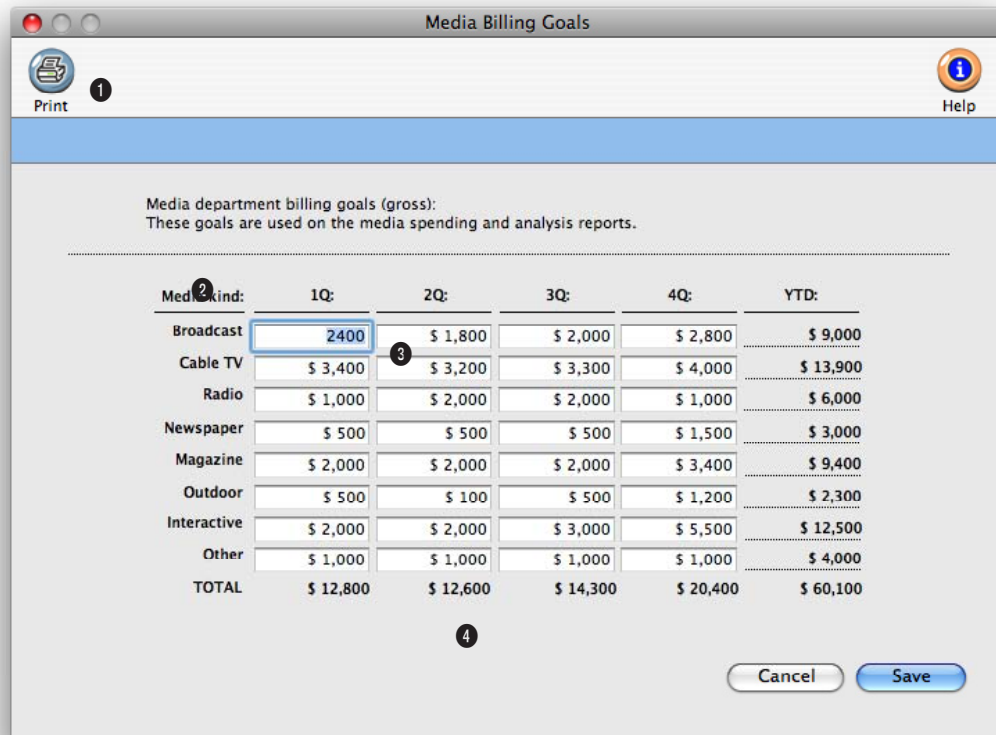
These media billing goals can be edited any time. They are used only for media reports, and don't affect job tickets, media plans or estimates, job costing, or the General Ledger.

The Media Billing Goals window allows the agency to record media spending goals per media type, per fiscal quarter, and also calculates a total for each media type, quarter, and year-to-date. In media analysis reports, these amounts are measured against actual gross amounts derived from media spending.

1 Click **print** to get a report of the year's billing goals by media kind and quarter.

2 The **media kind** is used to categorize different types of media (e.g., tv, radio, newspaper, etc.) and is a vendor setting. When media performance reports are printed (see Snapshots > Media), C&P X will summarize media billings by vendor, sub-totaling by the vendor's media kind setting.

3 Enter the billing goals for each kind of media for each quarter of the year.

4 The quarterly and media kind totals are calculated as you tab between fields.

Media Reports

Clients & Profits prints two kinds of media reports: status and traffic. Status reports are used by media buyers and the media department to track open media plans, media estimates, media deadlines, and unbilled media. Traffic reports allow you to see the scheduled buys based on space closing and materials due dates, which are entered for each line item on a media plan or estimate.

To print media reports

Media reports can be printed from the Media Estimates, Broadcast Media Plans, or Print Media Plans windows.

1 Choose File > Print Media Reports.

Media reports are grouped together by category (i.e., Status or Traffic). Each category has a collection of media reports that can be printed. Only one report can be printed at a time.

2 Select a report category to show the reports that can be printed.

3 Choose a report by clicking on a report name.

4 Enter a range of dates and select any available options.

Status and traffic reports are based on media plans and media estimates, so the date range entered will select plans or estimates based on the date they were added.

5 Click Print.

■ Any print or broadcast media plan that is marked as "closed" or "inactive" will not be included on media status reports or media traffic reports.
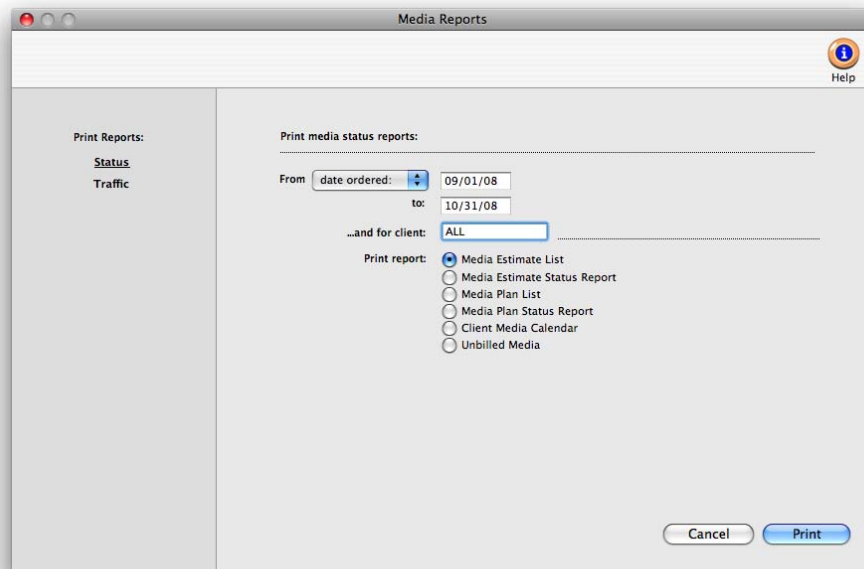
Media reports help different departments manage clients. Status and traffic reports track the day-to-day media plans and estimates. Post-buy reports help media buys track what's been ordered. Account service can use client spending reports to analyze each client's media spending. Group performance reports summarize how well the media department manages spending trends, client media profitability, and spending volumes.

Status Reports	
Media Estimate List	The Media Estimate List lists all media estimates for a range of dates.
Media Estimate Status Report	The Media Estimate Status Report lists open media estimates sorted by status, which is user-defined.
Media Plan List	The Media Plan List prints all broadcast media and print media plans for a range of dates.
Media Plan Status Report	The Media Plan Status Report lists open broadcast media and print media plans sorted by status, which is user-defined.
Unbilled Media	The Unbilled Media Report lists all insertion orders and broadcast orders that have not been billed to the client. The orders are grouped by client and sorted by order number.
Client Media Calendar	The Client Media Calendar lists media buys by billing period, which is based on your accounting periods. Media buys are grouped by client, then subtotaled by month. The month's media buys are then sorted by close date and issue date. Each media buy shows its publication, issue date, ad name, ad size, space closing date, and materials due date.
Traffic Reports	
Space Closings	The Space Closings Reports lists the selected space closing dates of media estimate buys, sorted by media buyer and date. It can be printed for planned or ordered media buys.
Material Due	The Materials Due Reports lists the selected material due dates of media estimate buys, sorted by media buyer and date. It can be printed for planned or ordered media buys.
Media Job List	The Media Job List shows the job number, job name, AE, job due date, status, and status note for each job with a media estimate, and sorts it by client.

Media Link

The Media Link imports broadcast orders, print insertion orders, and vendor invoices into Client & Profits X from leading media buying systems, including SmartPlus, TAPSCAN, Strata, and other systems that support the Standard Media Interface. .
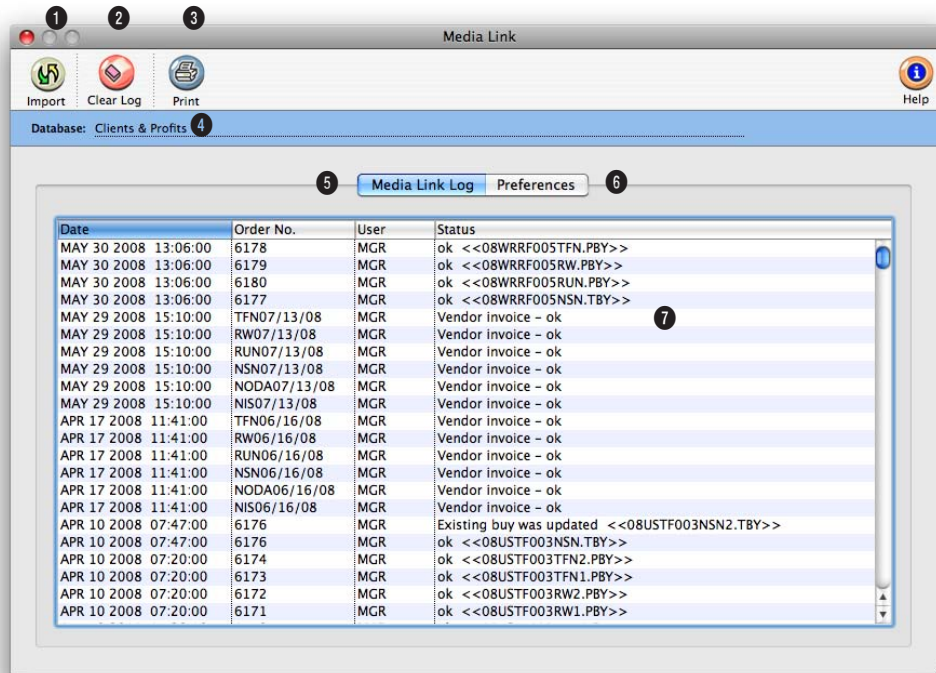
Media Link imports broadcast orders, print insertion orders, and vendor invoices into Clients & Profits from media buying system that support the Standard Media Interface.

Media buying systems that support SMI export media orders from media plans into specially-formatted text files, one for each broadcast order, insertion order, or vendor invoice. These files the order details (e.g., station ID, run dates, number of spots, rating, cost, etc.) or invoice needed by Clients & Profits X for job costing, billing, and media accounting.

How it works: A media buyer enters broadcast orders, insertion orders, and vendor invoices into SmartPlus, TAPSCAN, or

Strata. The media buying system exports a copy of the order or invoice into a designated media_buys folder on your file server. The Media Link looks for these media buy files then imports them into your C&P X database as broadcast orders, insertion orders, or vendor invoices—just as if you'd typed them in yourself. These orders can be billed to clients just like any other media order. Imported invoices appear in Accounts Payable.

1 Clicking **import** tells C&P

X to look for any export files inside the media_buys folder then import them.

2 Click the clear log button to erase the Media Link activity log. Clearing the log deletes the entries permanently.

3 Click the print button to get a hard-copy report of the Media Link's log entries.

4 The database name is shown for reference. If you use multiple databases, be sure

Media Link really pays off when you´re buying large amounts of broadcast or print media. Rekeying dozens of buys each week into Clients & Profits would be tedious and probably error-prone. There´s no double-entry and no missing data.

to double-check the database name—otherwise you might import media buys into the wrong database.

5 The Media Link Log tab displays your recent activity. Each time an order or invoice is imported, a log entry is created.

6 The Preferences tab (see right) offers settings and options that let you control how some parts of
the Media Link will behave. These settings let you turn on and off certain functions.

7 For each imported order you'll see the date/time it was imported, the order number (as entered into the media buying system), the initials of the person who imported the order, and the order's import status. The status notes any problems with the imported media order.
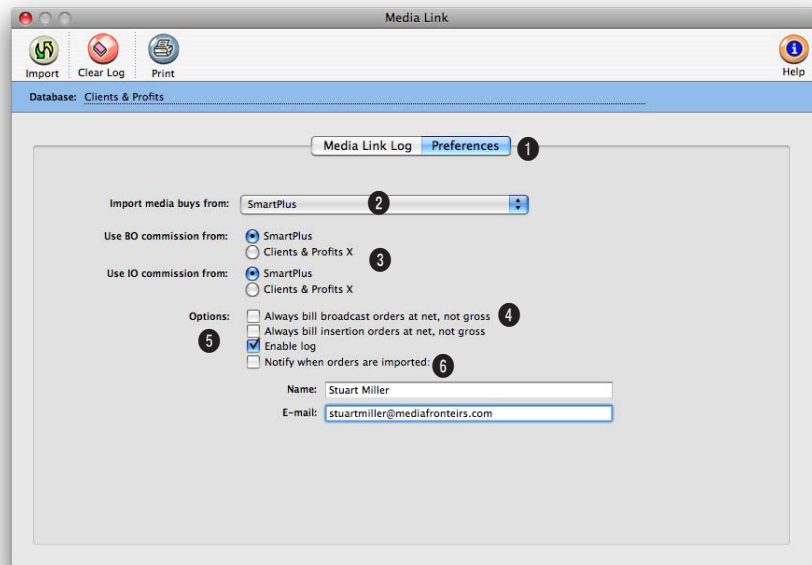
Media Link imports media buys from leading media buying systems, such as Smart-Plus, Strata, TAPSCAN, and other systems that support the Standard Media Interface.

1 Click the Preferences tab to edit the Media Link's options and settings. The changes you make are saved automatically and take affect immediately.

2 Choose your media buying system from the **import media buys from** pop-up menu.

3 If you bill a different commission rate than that in your media system, select "Clients & Profits" from the **use BO or IO commission from** checkbox. This is usually done if you bill at a lower commission than

the standard 15%. The gross amount will be recalculated during the import using the commission rate entered in client's Billing Info window.

4 If your shop doesn't charge media commissions to clients, check the **always bill net** option. This forces all imported orders to be billed at net cost instead of gross cost. But make sure your media buying system is not already exporting at this lower gross cost, otherwise you will incorrectly reduce your billing amount if you choose to

use the Clients & Profits commission rate. If it is already exporting the gross cost at the lower commission then leave the setting at your media buying system.

5 Uncheck the enable log option if you don't need to record the Media Link's activity.

6 Use the **notify** option to send an e-mail to any staff member (such as a bookkeeper) whenever a new order or invoice is imported automatically.