A
Media Buyer's
Guide to
Clients & Profits

Introduction

All versions of Clients & Profits have built-in media planning, buying, and tracking capabilities. These media functions seamlessly integrate with job tickets, job costing, client billing, and the agency's financial accounting, depending on which version of Clients & Profits you use. All versions of Clients & Profits can create detailed broadcast and print media orders for TV, newspaper, magazine, and alternative media buys, as well as import media orders from buying systems such as Strata, SmartPlus, and TAPSCAN. With both Clients & Profits Pro and Clients & Profits Classic feature media billing, the media planning, reporting, and accounting functions in Clients & Profits Classic are limited. The back cover of this guide contains a chart that compares the media features on Clients & Profits Classic, Clients & Profits Pro, and Job Tracker.

This guide explains Clients & Profits' complete media management capabilities, including how to:

- create and maintain lists of stations/programs and publications/ad sizes
- add, edit, and print broadcast and print media plans
- add and print media estimates
- create insertion and broadcast orders automatically from media plans and estimates
- add and print broadcast orders and insertion orders
- import media orders from Strata, SmartPlus, and TAPSCAN
- track materials due and space closing dates
- print media plans, estimates, and reports

Clients & Profits Help Desk: (800) 521-2166

Contents

You'll find many helpful screen shots throughout this guide that illustrate Clients & Profits' media features and capabilities. You'll find up-to-date technical information about how the media interface works, as well as tips, shortcuts, and troubleshooting ideas at the Clients & Profits media web site:

www.clientsandprofits.com/media/media.html

You'll also find more information about the C&P Media Link and the Standard Media Interface here:

www.clientsandprofits.com/media/media_link.html

How Clients & Profits Manages Media

The media functions in Clients & Profits 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 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 (which aren't available in C&P Classic) 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.

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

PO 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 PO 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.

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) 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. They are available in all versions of Clients & Profits.

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.

■ Media plans are only available in Clients & Profits Pro and Job Tracker.

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).An insertion or broadcast order can be

Media Features

Feature	How it works, how it's used
Media Calendar	Clients & Profits Pro and Job Tracker feature 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. *Not available in Clients & Profits Classic.*
Publications/Ad Sizes 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	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. *Not available in Clients & Profits Classic.*
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, or internet buys, including the number of spots, rating, cost per point, and more. Broadcast orders can be generated directly from broadcast media plans. *Not available in Clients & Profits Classic.*
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. *Not available in Clients & Profits Classic.*
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 Purchase 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 Purchase 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. *Not available in Clients & Profits Classic or Job Tracker.*
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, TAPSCAN, and Strata Media Buys	The optional C&P Media Link imports broadcast orders from MRP's SmartPlus, TAPSCAN, and Strata. Imported buys appear automatically in the Purchase Order 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 using a simple-to-program import file format.

Overview (con't)

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

Insertion orders can be added manually into the Purchase 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

Broadcast orders can be added manually into the Purchase 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.

Media Billing

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

easily and quickly pre-billed directly from the Purchase Order window. It's simple: find the order, then choose Pre-bill this Purchase/Insertion 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.

Importing Media Buys If your shop buys a lot of broadcast media spots, then you're probably already using a media buying system such as MRP's SmartPlus, Tapscan, and Strata. These systems perform sophisticated planning and analysis for high-dollar media plans that Clients & Profits doesn't try to duplicate. Since these systems also print their own insertion orders, rather than rekeying these insertions, the C&P Media Link can instantly import them as broadcast orders (just as if you'd typed them one by one). The C&P Media Link works along side the C&P broadcast plans, print plans, and media estimates. You can still add and print insertion orders from Clients & Profits. The Media Link can run unattended, automatically importing new media orders at selected intervals. Or, media orders can be imported manually. The Media Link also keeps a daily log of what's been imported for better accountability. For more information, check the Clients & Profits media web page at: **www.clientsandprofits.com/media.html**.

TV / RADIO / CABLE / INTERNET

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 / INTERNET

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

The Media window

The Media window is an Information Center-like window for managing media. The window features buttons for using media estimates, broadcast plans, print plans, and the stations and publications tables.

To open the Media window

1 Choose View > Media Plans (Media Estimates).

The Media Recap gives media planners and buyers a one-stop place to check upcoming deadlines for space closing and materials due—as well as any scheduled calendar entries added by other C&P users. Instead of printing a media traffic report, a media buyer can use this window to look up media deadlines for the next four weeks (one week at time). Space closing deadlines are listed from broadcast and print media plans, using space closing dates entered for each media buy. Materials due deadlines are shown from insertion orders using dates entered when the order was created. And media calendar entries are shown.

Media calendar entries are added by C&P users as an online "tickler" file for remembering important media-related dates, such as client presentations, vendor meetings, conferences, and planning sessions. Media calendar entries can be scheduled for any time in the future, and have the option to be automatically e-mailed when they're due.
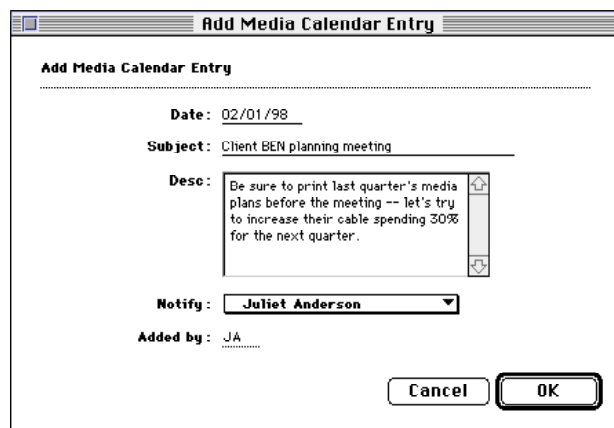
To update the Media Recap

1 Choose a week from the pop-up menu.

2 Click the [icon] (i.e., Lookup) button.

Clients & Profits looks up the week's schedule entries from the Media Calendar, space closing deadlines from broadcast plans, and material deadlines from insertion orders.

■ Double-click on a media calendar entry to see its full details.

Add Media Calendar Entry

Date: 02/01/98

Subject: Client BEN planning meeting

Desc: Be sure to print last quarter's media plans before the meeting -- let's try to increase their cable spending 30% for the next quarter.

Notify: Juliet Anderson

Added by: JA

Cancel   OK

Media calendar entries keep track of important media dates. "Tickler" entries can be scheduled for any time in the future. They'll appear in the Media Calendar list, and can be automatically e-mailed on the day they are due.

To add a media calendar entry

1 Click the [icon] (i.e., Add) button.

2 Enter the scheduled entry's date, subject, and description.

3 Choose a staff member name from the Notify pop-up menu to automatically e-mail this entry on its date.

4 Click Save.

To edit a media calendar entry

1 Double-click on the entry you wish to change.
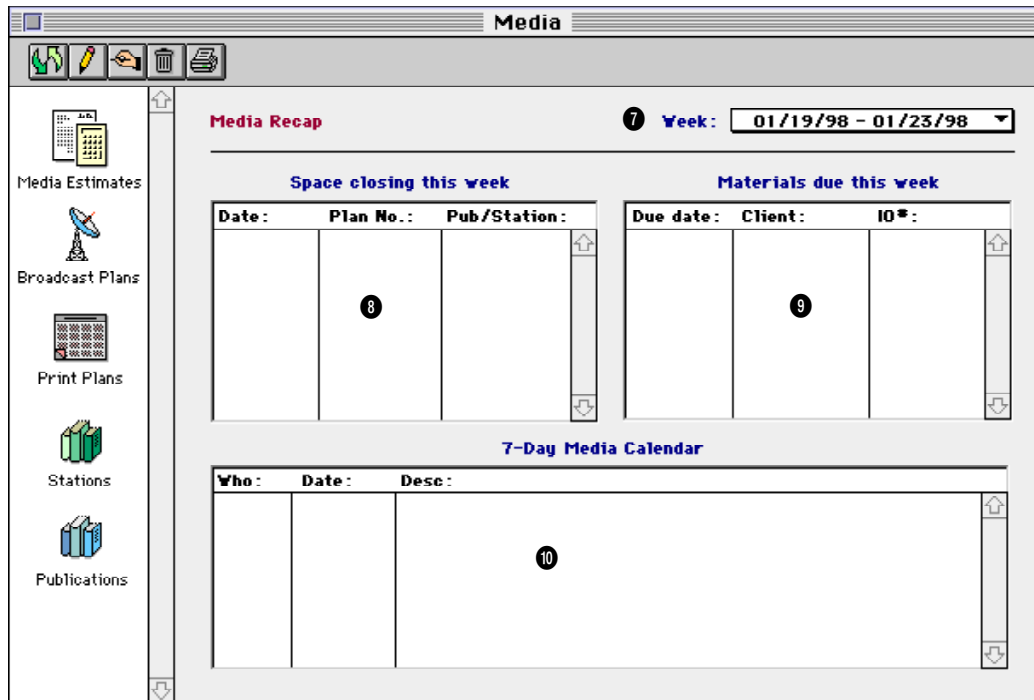
To delete a calendar entry

1 Find the entry you wish to change.

2 Click the [icon] (i.e., Delete) button.

To print the Media Calendar report

The Media Calendar report shows the selected week's calendar entries.

1 Choose a week from the pop-up menu.

2 Click the [icon] (i.e., Print) button.

The Media window

1 Use the toolbar buttons to update the calendars, add, edit, and delete calendar entries. The **Print** button prints a hard-copy of the media recap boxes, including the week's calendar entries.

2 Click the **Media Estimates** button to open the Media Estimates window, where you can add, edit, delete, and print media estimates.

3 Clicking on the **Broadcast Plans** button opens the Broadcast Plans window, where you can add, edit, delete, and print radio, TV, cable, and internet media plans.

4 Click on the **Print Plans** button to view, add, edit, delete, and print daily, weekly, and monthly print media plans.

5 Clicking on the **Stations** button opens the Stations/Programs window, which lists all of the TV, radio, and cable stations used by broadcast plans. Dozens of different times/programs can be added for each station, each with its own cost, rating, and description.

6 Click the **Publications** window to show all of the newspapers, magazines, and periodicals used by print media plans. For each publication you'll see its ad sizes, including costs.

7 The Media window can list space closing, material due, and calendar entries for the next four weeks by using the **Week** menu. Scheduled entries are shown one week at a time.

8 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.

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

10 The **7-day media calendar** shows upcoming media related dates.

Publications

Clients & Profits Pro keeps a detailed listing of the publications you use for media print buying. Each publication 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.

Publications are used by print media plans. A print media plan is composed of different space buys. Each publication is added as a separate space buy on a print media plan, along with up to twelve months (or weeks, or seven days) of insertions. When you're adding a space buy, you'll select a publication from the Publication lookup list—which links the media buy with the publication and its rates.

The Publications/Ad Sizes window shows both your publications and their ad sizes. You'll add, edit, and delete both publications and ad sizes here. The window's toolbar buttons let you add, edit, delete, and print publications and ad sizes. There is no limit to the number of publications (and ad sizes) in your Publication table.

To view the Publications table

1 From the Media window click on the Publications button.

The Publications/Ad Sizes window lets you add, edit, delete, and print both publication and ad sizes/rates.

To add a new publication

1 Click the [icon] (i.e., Add Pub) button.

2 Enter the publication's vendor.

Each publication needs to be associated with a vendor in the Vendor table. The vendor and the publication can be the same, but must be added separately. One vendor can have many publications.
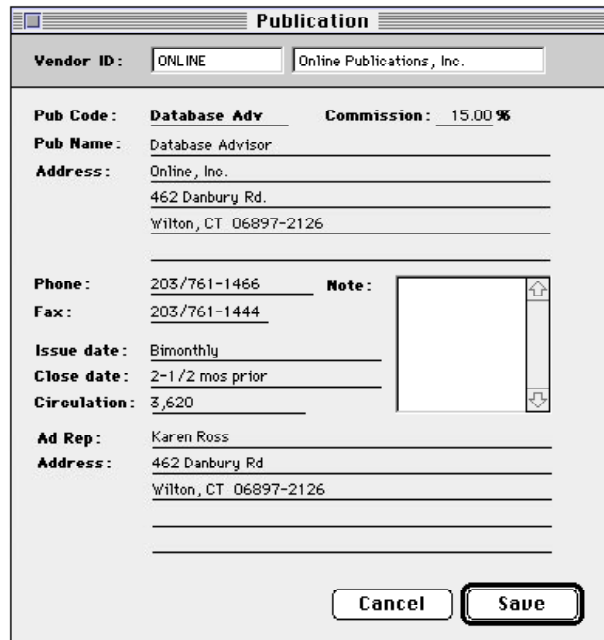
3 Enter the publication code.

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. It is customizable and user-defined.

4 Enter the publication's name, address, phone, rep name and address, and other details, then click Save.

The address, phone, and representative information is optional, but appears on printed media orders.

See publication info at a click of a mouse. Anyone using Clients & Profits can see and update the publication's information, including the ad representative's name, address, and phone number.

To change a publication

1 Click on publication to select it, then click [icon] (i.e., Edit) or double-click on a publication.

2 Make your changes, then click Save.

If a publication has ad size records, its pub code can't be changed. Editing a publication's details does not affect existing insertion or broadcast orders.

To delete a publication

1 Click on publication to select it.

2 Click [icon] (i.e., Delete).

A publication which has ad size records can't be deleted.

To print a publications list

1 Click the Print button.

The Publications window

1 Use these toolbar buttons to add, edit, and delete publications as well as print a publication list.

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.

3 Each 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. When a print media plan is created, the right rate will be copied to the space buy automatically. Selecting a client from the pop-up menu displays that client's special contract rates. The ad sizes/rate table needs to be frequently updated as the rates and ad sizes change.

4 Your publications are listed here, sorted alphabetically. 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. Double-clicking on an ad size opens the Print Ad Size window, where you can change the ad's details.

Stations

Clients & Profits Pro keeps a detailed table of the stations you use for media broadcast buying.

Each station belongs to a vendor in the Vendor table. One vendor can have dozens of stations, each with its own set of programs, times, and contract rates.

Stations are used by 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 flight. 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. You'll add, edit, and delete both stations and programs/times here. The window's toolbar buttons let you add, edit, delete, and print this information.

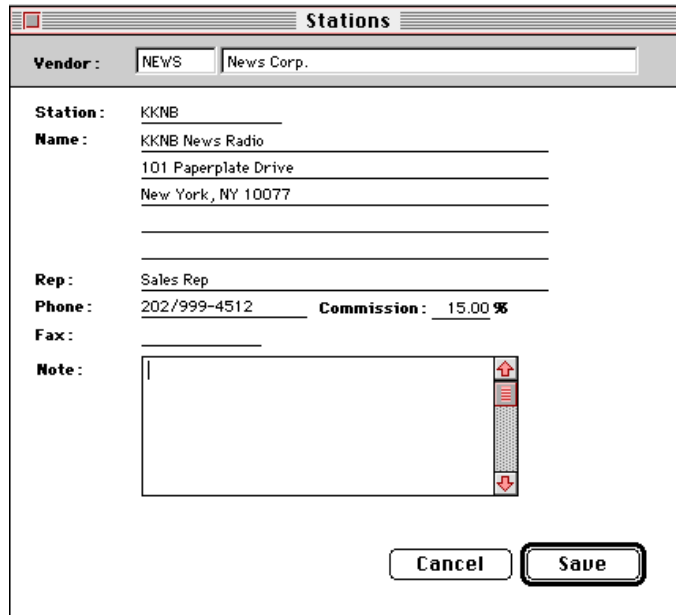There is no limit to the number of stations (and programs/times) in your Station table.

To add a new station

1 Choose Media Plans (Estimates) from the View menu.

2 Click the Stations/Programs/Contract Rates button.

Stations

The Stations/Programs/Contract Rates window opens, listing your existing stations.

3 Click the Add Station button.

4 Enter the new station's vendor number, station code, address, and other details.

5 Click Save.

Adding new stations. Each station belongs to a vendor, which helps integrate media orders with accounts payable. One vendor can have dozens of stations. And each station can have dozens of program/contract rate combinations.

To change a station

1 Choose Media Plans (Estimates) from the View menu.

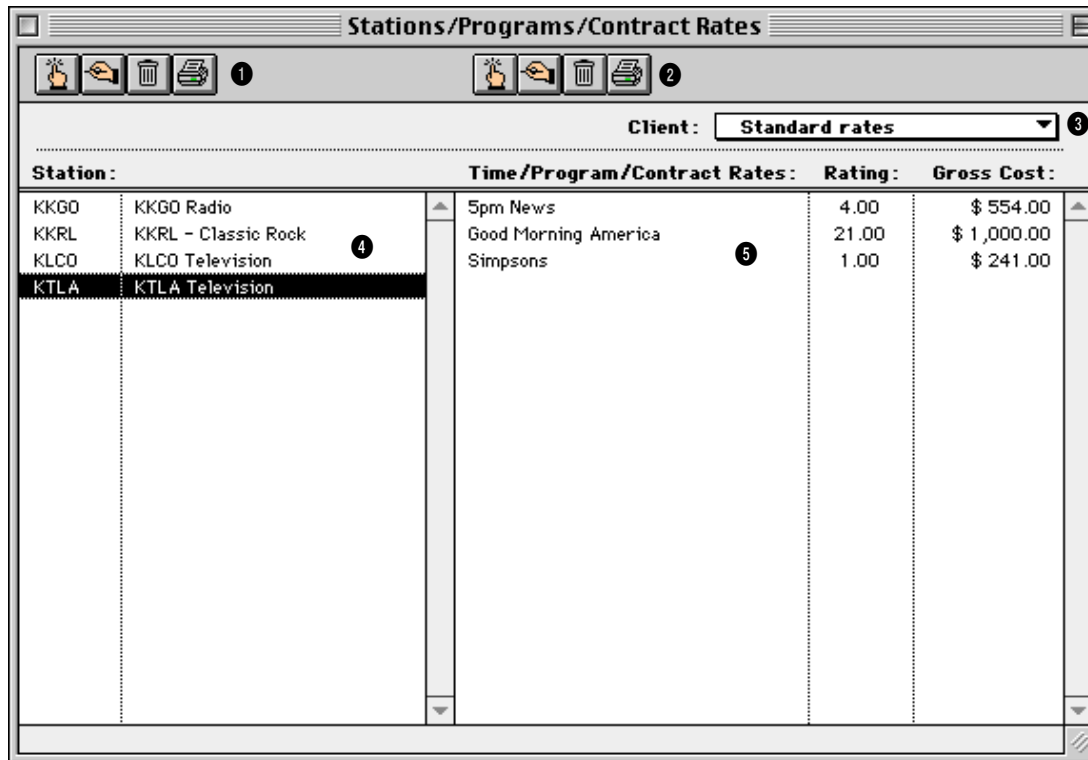**2** Click the Stations/Programs/Contract Rates button.

The Station/Programs/Contract Rates window opens, listing your existing stations.

3 Double-click on a station.

The station window opens, displaying the station's information.

4 Make your changes, then click Save.

The Stations/Programs window

The Stations/Programs/Contract Rates window lets you add, edit, delete, and print both stations and programs/times.

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.

Ad Sizes and Contract Rates

Clients & Profits Pro keeps a detailed table of publication ad sizes/contract rates for media planning and buying. Each publication has its own set of ad sizes, one for each type of ad that you commonly use. The ad sizes table is completely customizable, including how each ad is described. The information you'll enter for ad sizes is copied automatically to space buys on new print media plans. This saves time, since there's no rekeying. For flexibility, you can customize ad size and rate details on any print media plan.

■ Your ad sizes table will need to be updated constantly to keep the information accurate and timely.

To add a standard ad size for a publication

1 From the Publication/Ad Sizes window, click once on a publication to select it.

2 Click the [icon] (i.e., Add Print Ad Size) button.

The Print Ad Sizes window opens, displaying the publication name and client rate basis (i.e., standard or client-based).

3 Enter a name or short description of the ad's size (e.g., "Back Cover").

4 Enter the basic **position** for this ad size. Its position is copied to the media plan and then to the insertion order. Position can be customized on specific plans and insertion orders.

5 Enter the ad size's **notes**, which are used for your own reference. They do not appear on plans or insertion orders.

6 Enter the ad size's **gross cost** (i.e., what the publication charges for the ad, including your commission), your agency **commission** (which is typically 15% or less), and **net cost** (i.e., the amount you'll eventually pay for the ad). The **bill net cost, not gross** tells the insertion order to exclude any commission or markup. Use this option when your clients don't pay commissions for media buys.

On-line ad sizes make media buying more accurate. Media buyers can set up many ad size records for each publication. The details entered for each ad size is copied automatically to print media plans, then finally to insertion orders.

7 Enter the ad's standard **issue date** here. It is used for quick reference when planning a buy's space close and materials due dates. This information doesn't appear on the printed media plan or insertion order.

8 Enter the ad's typical **space closing** date here. It is used as a reference while you're scheduling a buy's production dates. It doesn't appear on printed media plans or insertion orders.

9 Enter the day of the month on which **materials close**. This information appears on the Space Close/Materials Due Dates pop-up window when you're editing a media buy.

10 Click Save.

To add a special ad size or rate for a publication and a client

1 From the Publication/Ad Sizes window, click once on a publication to select it.

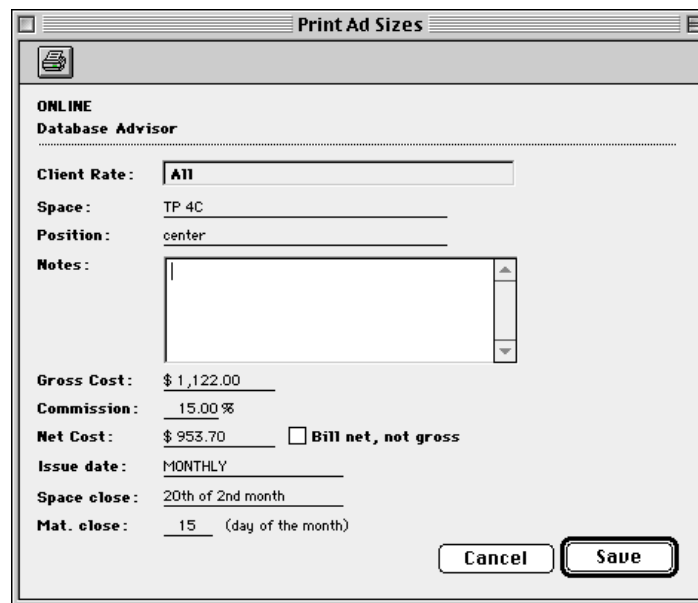**2** Choose a client from the pop-up menu.

The pub's standard rates are now replaced by the client's special contract rates.

■ Choosing a client from the pop-up menu displays the client's contract rates and ad sizes for the publication. Each client can have its own contract rates that reflect special deals you make with the publication on the client's behalf. When a space buy is added to the Print Media Plan, the client's special rates will be used automatically, replacing the standard rates.

3 Click the Add Ad Size button.

4 Enter the ad size's name, the client's special ad cost, and other details like a regular ad size.

5 Click Save.

Print Ad Sizes window:

ONLINE
Database Advisor

Client Rate: All
Space: TP 4C
Position: center
Notes:
Gross Cost: $ 1,122.00
Commission: 15.00 %
Net Cost: $ 953.70   ☐ Bill net, not gross
Issue date: MONTHLY
Space close: 20th of 2nd month
Mat. close: 15 (day of the month)
[Cancel] [Save]

Times, Programs, and Contract Rates

Clients & Profits Pro keeps a detailed list of times, programs, and contract rates for broadcast media planning and buying. Each station has its own set of times and programs, one for each type of spot that you commonly use. The Times/Programs table is completely customizable, including the name of each spot (e.g., "Late Show"), its rating, cost, and a description. The information you'll enter for programs and times is copied automatically to spot buys on new broadcast media plans. This saves time, since there's no rekeying. For flexibility, you can customize programs/times and rate details on any broadcast media plan.

■ Your Time/Program/Contract Rates table will need to be updated constantly to keep the information accurate and timely.

To add a program/time record for a station

1 From the Stations/Programs/ Contract Rates window, click once on a station to select it.

2 Click the [icon] (i.e., Add Time/Program) button.

The station's Time/Program window opens, displaying the station name and client rate basis (i.e., standard or client-based).

3 Enter the **time/program name** to describe the daypart or program. This name appears on the printed broadcast media plan and worksheet, so clients see it.

4 Enter the time/program's **rating**.

5 Enter the time/program's **gross cost** (i.e., what the station charges for the spot, including your commission). The rating and gross cost are copied to the broadcast media plan automatically.

6 Enter a long **description** to note any kind of additional information about the time/program. This description is for internal use and doesn't appear on the broadcast media plan.

7 Click Save.

Programs, times, and rates.
A station can have dozens of different time/program records. The details entered for each time or program is copied automatically to broadcast plans, then finally to its orders.

To add a special program or contract rate for a station and a client

1 From the Stations window, click once on a station to select it.

2 Choose a client from the pop-up menu.

remaining details.

5 Click Save.
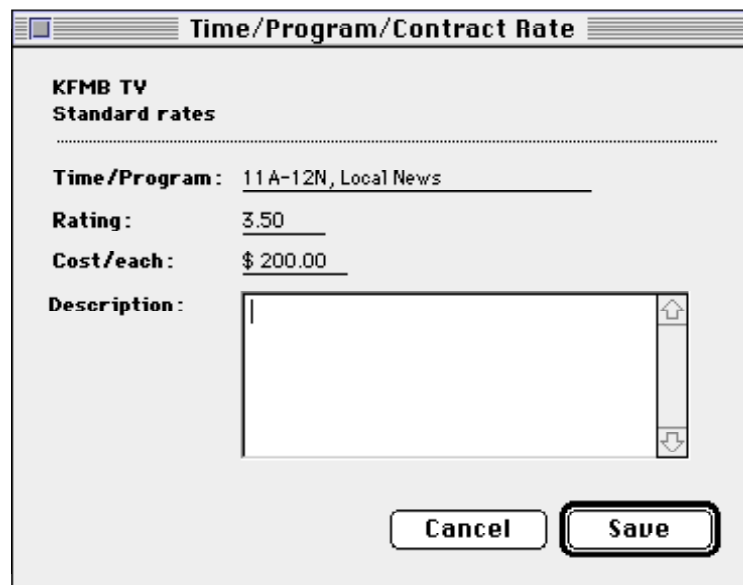
The station's standard rates are now replaced by the client's special contract rates.

■ Choosing a client from the pop-up menu displays the client's contract rates and time/programs for the station. Each client can have its own contract rates that reflect special deals you make with the station on the client's behalf. When a spot is added to the Broadcast Media Plan, the client's special rates will be used automatically, replacing the standard rates.

3 Click the Add Time/ Program button.

4 Enter time/program's

Media Estimates

The media estimate provides a simple way to show clients how and where their ads will be placed. The estimate is composed of different media buys made for a single campaign, such as a product launch. The media estimate features a long description that can be used to describe your objective for these buys; this description appears on the printed estimate that the client approves. There's no limit to the number of media estimates you can create for a client.

A media estimate can contain one or more media buys. Each media buy appears separately as a line item on the printed media estimate. The media buy is customizable; you can enter custom headings for each of the buy's five fields. Since the media estimate is designed primarily for print media, the standard column labels are: publication, issue date, close date, ad number or caption, and ad size. The gross amount for each buy—what the client will eventually pay—appears on the printed estimate.

Unlike media plans, the media estimate does not use the publication ad sizes lookup table. This means you'll need to enter the media buy's issue date, close date, etc. separately on each media estimate. However, the publication field will automatically look up and show your publication table; double-clicking on a publication enters it onto the estimate.

Insertion orders can be created automatically from media estimates. You can easily make a separate insertion order for each buy, or combine some or all buys on a single insertion. The media estimate tracks when each buy was ordered, for better accountability. Each media estimate features a user-defined status. A status report can be printed anytime showing media estimates sorted by status.

To see media estimates

1 From the Media window, click on the Media Estimates button.

The Media Estimates window opens, showing the last-added media estimate. Toolbar buttons along the top of the window let you find, add, change, and print media estimates. Double-clicking on a line item displays the estimate's buy details, which you can change.

To find a media estimate
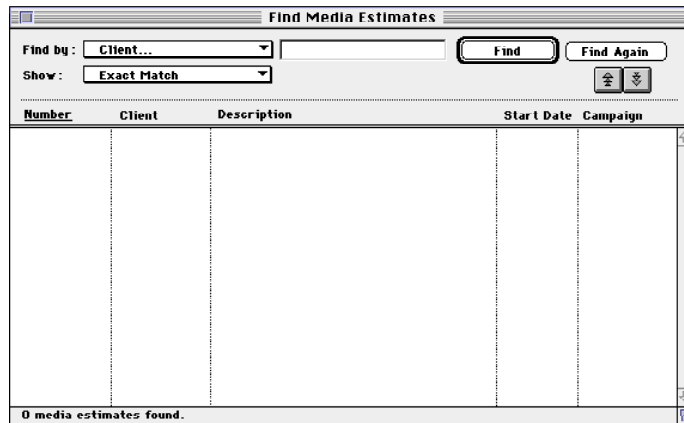
1 Click the [Q] (i.e., Find) button.

2 Enter the media estimate number, or choose a different find option from the Find By pop-up menu.

You can find media estimates by estimate number, client, or sequence (i.e., the order in which they were added). To find a media estimate for a selected client: Click the Find button, then choose Client from the pop-up menu. Enter the client number, then click Find. The first media estimate for the chosen client appears.

3 Click Find.

■ Click the Next or Previous button to browse through other media estimates.

The Media Estimate window

1 Use these buttons to find a media estimate, or browse forward or backward.

2 Use these buttons to add, edit, or delete the entire media estimate.

3 Use these buttons to add and remove selected media buys and to print the media estimate.

4 Click the **Make Insertion** button to create insertion orders for one or more buys on this media estimate.

5 The media estimate's client, date, description, and buyer appear for reference.

6 Every estimate has a customizable **estimate number**. It works like a job number to identify different media estimates. New media estimates are numbered automatically.

7 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.

9 A media estimate can contain dozens of individual buys, which represent different months 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.

10 The **status** field can be used to track media estimates. It appears here for reference, but it can be edited in the Edit Media Estimates window.

Adding a Media Estimate

Anyone who can access media plans can add media estimates. 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.

Media estimates are flexible, so can be changed as needed. You can change any part of the media estimate's client number, description, status, disclaimer, and approvals (but not the estimate number) any time. Media buys can be added, changed, and removed as well.

To add a media estimate

1 From the Media window, click the Media Estimates button.

2 Click the Add button.

3 Enter a client number.

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

■ If you don't know the client number, leave it blank then press Tab. The client lookup list opens, displaying your clients. Double-clicking on a client name enters it into the new media estimate automatically.

4 Enter the estimate number, status, and campaign.

Media estimates are numbered automatically, based on a client number. When you tab past the client number, the estimate number is calculated automatically from the client's media estimate number. Each client has a media estimate number—see the client's Billing Information window—which is customizable. (By the way, media estimates and media plans are numbered separately.) The standard estimate number combines the client code and the next media estimate number. You can change it by entering your own number over the automatic one.

Each media estimate can have a customizable status description. Status is used to track media estimates from start to finish, and is optional. There is no lookup table for the media status—just enter any text that's helpful. Later, you can print a report showing media estimates arranged by status.

The media campaign name is optional, too. It is there as a convenience to your client, since it appears on the printed media estimate. Different media estimates can belong to the same campaign. Custom reports can be created showing media estimates and media buys by campaign, if needed.

5 Enter the job and task.

The media estimate's job and task will be copied to the estimate's insertion orders.

6 Enter the description.

The complete description appears on the printed media estimate. Use it to describe the estimate's strategy or objective to the client. Since the media buys don't have much room for descriptions, any additional information or special instructions should be included here.

■ If you don't want the description to appear on the media estimate, de-select the "show description on printed media estimate" checkbox.

7 Enter the column labels.

The media estimate's column labels determine what kind of information appears for its media buys. The standard labels are designed for print media: publication, issue date, close date, ad number/caption, and ad size. You can enter any kind of text in these labels. When you add media buys to this estimate, you'll see these column labels. Each media estimate can have its own special set of column headings. The headings you enter here won't affect other media estimates.

8 Enter the media estimate's approval names.

Each media estimate can include up to three approval names. Anyone can be added as an approval name, such as a client contact, media buyer, account executive, etc. There are no standard approval names.

9 Enter the disclaimer.

The disclaimer appears at the bottom of the printed media estimate, above the approval names.

There is no standard disclaimer. (The default disclaimer in Preferences is only copied to insertion orders, not media plans or media estimates.)

10 Enter the commission percentage.

The commission percentage will be copied from the client file, but can be changed here.

11 Click Save.

To clone a media estimate

Cloning creates a new media estimate from an existing one. It copies all of the details and buys from an existing media estimate, then lets you change it. To clone a media estimate, choose Edit > Clone Media Estimate. Enter the new media estimate's additional details, then click Save.

The Add Media Estimate window

Add New Media Estimate

Client:	OFF OFFICE Corporation ❶
Estimate #:	OFF335 Status: New, unapproved ❷
Campaign:	Corp Mktg ❸ Job: 98-OFF-346 ❹
Date:	01/31/98 Task: MED

Description: ❺

☒ Show description on printed media estimate Added by: MB ❻

Column labels: ❼
Publication
Issue Date
Close date
Ad#/caption
Size

Disclaimer: ❽

Approvals: ❾
Media Buyer
Account Coordinator
VP Marketing

Commission: 15.00 % ❿

Cancel   Save

1 Each media estimate is opened for only one **client**. 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.

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

3 Media estimates can contain client **campaign** codes. These optional codes can be used to track media expenses by campaign.

4 Media estimates don't directly affect job tickets until insertion orders are created. A media estimate's insertion order gets its **job number** and **task**

from these fields. All buys on the media estimate use the same job and task.

5 The **description** can contain any kind of notes, specifications, objectives, or strategies that should appear on the printed media estimate. You can show or hide the description on printed media estimates by selecting the **show description** option.

6 These are the initials of the person who adds the media estimate, typically the media buyer.

7 The estimate's **column labels** are important, since they determine the content of the media estimate. The standard labels are set up for typical print media buys, but they can be changed. These labels will be used by every buy on this estimate. Changing labels on one media estimate doesn't

affect other estimates. There is no way to change the standard label settings.

8 The **disclaimer** appears at the bottom of the printed media estimate, above the approval names. It is complete customizable. The disclaimer you'll enter here doesn't appear on other media estimates.

9 Up to three **approval names** can appear on the printed media estimate.

10 The media **commission** is used to calculate each buy's net cost from its gross cost, which is entered by the media buyer.

Adding Buys to a Media Estimate

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 media buys for many different publications, or many buys for the same publication. Each media buy features descriptive fields that are defined by the media estimate (the standard fields are publication, issue date, close date, ad number/caption, ad size, and gross cost).

Media buys on estimates use the Publications table, so you don't need to re-enter the publication name. However, you can also enter new or one-time publications that aren't in the Publication list. Buys on media estimates do not use the ad sizes lookup table—you'll need to enter the gross amount, close date, and space closing date by yourself on each buy.

You can add, change, and remove media buys at any time—just like tasks can be added, edited, and removed from jobs. Once you've added all of the estimate's planned buys, it can be printed for the client's approval.

To add buys to a media estimate

1 From the Media Estimates window, click the [button icon] (i.e., Add Buys) button.

The Add Buys to Media Estimate window opens, listing the estimate's existing media buys. Additional media buys are added one-at-a-time.

2 Enter the publication code.

You can use the Publication lookup list or enter any publication code (which may be the same as the name). To open the lookup list, leave the publication field empty then press Tab. The Publication lookup window opens, listing your publications. Double-clicking on a publication will enter it onto this media buy. If the publication is new, a one-time pub, or not on the Publication lookup list, simply enter its name here.

3 Enter the buy's issue date.

The issue date appears on the printed media estimate, insertion order, and the client's media invoice. The issue date field can contain any kind of information.

4 Enter the ad's close date.

The close date also appears on the printed media estimate and insertion order.

5 Enter the ad number/caption.

The ad number/caption identifies the advertisement on the insertion order. It is used as a reference by the publication, and can be the code or name the client uses to track the ad's results. The ad caption is usually some version of its headline.

The ad number/caption is entirely user-defined, so you can enter anything here.

6 Enter the ad size.

Ad size describes the ad's dimensions. This field is user-defined, so you can enter the ad's mechanical size, the publication unit of measure, or some other kind of description here.

The ad size appears on the printed media estimate, insertion order, and the client's media invoice.

7 Click on the Notecard button to enter the buy's position.

The pop-up Notecard window contains space to describe the ad's position, specifications, or special instructions—anything you want to appear on the insertion order. These notes are optional, so can be left blank.

These notes can also be easily edited later by double-clicking on the media buy.

8 Enter the ad's gross cost, then press Tab.

The gross cost is the amount the client will eventually pay for the ad, including your media commission. It appears on the printed insertion order and client media invoice. Since the media estimate isn't linked to the Publication/Ad Size table, the ad's gross amount isn't entered automatically. Tabbing past the gross amount field saves the media buy. Note: The buy isn't saved unless you press Tab here or you can also click Save to add this new media buy.

9 Repeat these steps to add additional media buys to this estimate, then click Save.

Once the media buy is saved, you can enter additional buys one after another.

The Add Buys to Media Estimates window
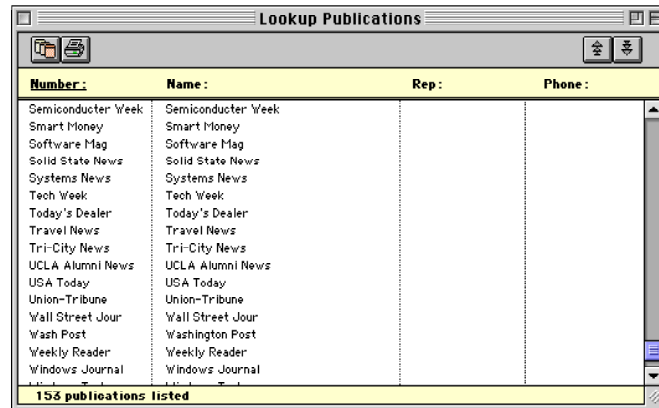
Add Buys to Media Estimate					
BANOO6					**Crime**
Banyan Data Systems, Inc.		❸		❽	**JA**
Publication ❶	**Issue Date**	**Close date**	**Ad#/caption**	🔲	**Gross Cost:**
Byte	September	08/02/98	"Stop Computer Crime" ❹		$ 2,458.00 ❻
❷		**Size**	F/P, 4C IFC ❺		**Period:** 9 ❼
Byte	January	12/05/97	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	February	01/02/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	March	02/03/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	April	03/06/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	May	04/06/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	June	05/01/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	July	06/08/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
Byte	August	07/03/98	"Stop Computer Crime" F/P, 4C IFC		$ 2,458.00
					$ 29,496.00

Done   Save   ❾

1 Enter the **publication code** here. To see the Publication lookup list, leave it blank then press Tab. The lookup window opens, listing your publication table. Double-click on a publication to copy it to the media buy.

2 The **issue date** indicates when the ad will run (such as the magazine's month, a newspaper's day, or some other date).

3 The **close date** is the publication's deadline to place a space order. If the client doesn't approve the media buy by the close date, it may lose its chance to run the ad in that issue.

4 The **ad number/caption** identifies the advertisement on the insertion order. It is used as a reference by the publication, and can be the code or name the client uses to track the ad's

results. The caption is typically something close to the ad's headline.

5 **Ad size** describes the ad's dimensions. This field is user-defined, so you can enter the ad's mechanical size, the publication unit of measure, or some other kind of description here.

6 The **gross cost** is the amount that the client will be billed for the ad, including your commission and any service charge. The ad's net cost is calculated automatically using the media estimate's commission amount (which is entered when the media estimate is first added).

7 The accounting **period** determines which month's financial statement should reflect the media buy's cost and billing. It's optional, but will make your media reports more meaningful. That's because the accounting period

on the media buy is used for printing media spending and other analysis reports. The media estimate itself does not affect the General Ledger.

8 The ad's position, specifications, or special instructions can be entered here by clicking on the **Notecard** button. You can also enter these notes later after the buy is saved.

9 Click **Save** to save a media buy or to add another buy simply tab past the Gross Amount field. Click **Done** to close this window.

Working With Media Estimates

To edit a space buy on a media estimate

The Edit Media Estimate Space Buy window opens, showing the buy's publication, issue and close date, gross amount, and other details.

1 Find the media estimate you wish to change.

2 Double-click on a media buy to change it.

The buy's column labels (i.e., publication, issue date, etc.) can't be changed here. Since these labels apply to every buy on a media estimate, they don't vary from buy to buy. To change these labels, edit the media estimate's description. Note: Changing these labels affects all buys on the media estimate.

The accounting period is used by media analysis reports, but has no affect on the General Ledger.

If the media buy has already been ordered on an insertion order, you'll see the IO number, date, and actual order amount at the bottom of the window.

To remove a space buy on a media estimate

A space buy can be removed from a media estimate anytime before it is ordered (that is, if an insertion order is created for it). Removing a buy is permanent. If a space buy is removed by mistake, you'll need to re-enter it.

1 Click once on a media buy to select it.

2 Click the [icon] (i.e., Remove Buy) button.

3 Click Yes when prompted.

To edit or delete a media estimate

A media estimate can be edited anytime. To edit a media estimate's name/title, description, and other details, click the Edit button. When the Edit Media Estimate window opens, make your changes then click Save.

Editing Space Buys. Double-clicking on a space buy displays its details, including when the buy was ordered. The buy's insertion order number, date, and amount is shown for easy reference.

1 Find the media estimate you wish to change.

2 Click on the [icon] (i.e, .Edit Estimate button).

3 Make your changes, then click Save.

A media estimate can be deleted anytime until any part of it has been ordered (that is, if an insertion order is created from it).

1 Find the media estimate you wish to delete.

2 Click on the [icon] (i.e., Delete Estimate) button.

To print a media estimate

A media estimate can be printed any number of times until it is perfect. (However, a media estimates can't be printed unless it has at least one space buy.)

1 Find the media estimate you wish to print.

2 Click the [icon] (i.e., Print) button.

Making Insertion Orders From Media Estimates

The option to include media buys on the same insertion order only works if they have the same publication. Otherwise, you'll get different publications on the same insertion order—which will confuse everyone.
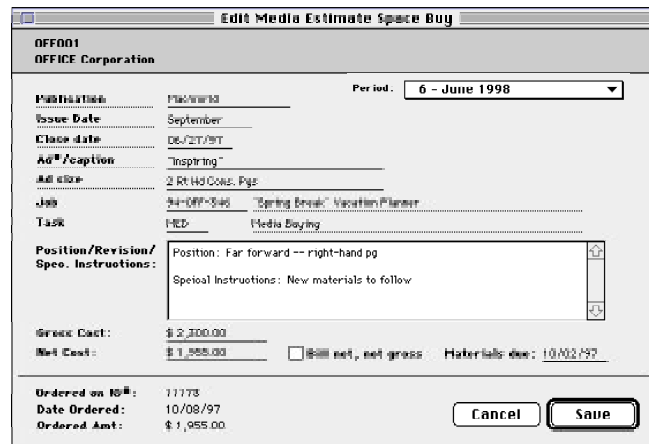
1 Click on the (i.e., Make Insertion) button.

2 Select an option to make one buy or all un-ordered media buys.
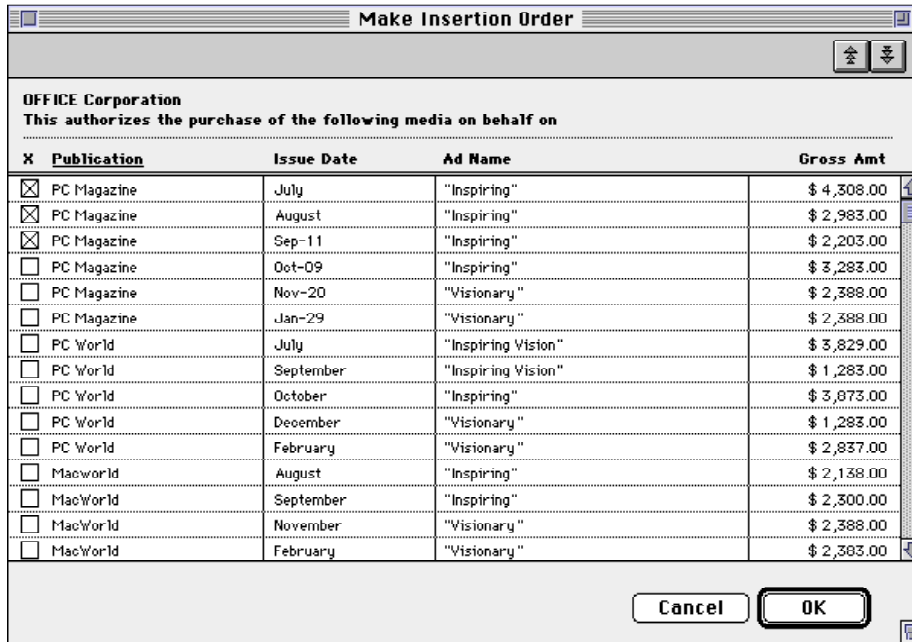
If you're making an insertion for a single space buy, select the issue date from the pop-up menu.

3 Click OK.

The insertion order is created automatically using details from your space buy. You can make an insertion order for one selected space buy, or for all space buys on the estimate. A space buy can't be ordered twice; if you try to select it again, you'll see a warning message.

■ After a few seconds, the insertion orders are saved. Once saved, they can be printed from the Purchase/Insertion Order window.

Making insertion orders. Clicking on a media buy selects it for this insertion order. An insertion order can contain a single media buy, or combine several media buys together for the same publication.

Make Insertion Order

OFFICE Corporation
This authorizes the purchase of the following media on behalf on

X	Publication	Issue Date	Ad Name	Gross Amt
☒	PC Magazine	July	"Inspiring"	$ 4,308.00
☒	PC Magazine	August	"Inspiring"	$ 2,983.00
☒	PC Magazine	Sep-11	"Inspiring"	$ 2,203.00
☐	PC Magazine	Oct-09	"Inspiring"	$ 3,283.00
☐	PC Magazine	Nov-20	"Visionary"	$ 2,388.00
☐	PC Magazine	Jan-29	"Visionary"	$ 2,388.00
☐	PC World	July	"Inspiring Vision"	$ 3,829.00
☐	PC World	September	"Inspiring Vision"	$ 1,283.00
☐	PC World	October	"Inspiring"	$ 3,873.00
☐	PC World	December	"Visionary"	$ 1,283.00
☐	PC World	February	"Visionary"	$ 2,837.00
☐	Macworld	August	"Inspiring"	$ 2,138.00
☐	MacWorld	September	"Inspiring"	$ 2,300.00
☐	MacWorld	November	"Visionary"	$ 2,388.00
☐	MacWorld	February	"Visionary"	$ 2,383.00

Cancel   OK

Print Media Plans

Print plans can be created for many kinds of newspaper, magazine, periodical, or Internet-based media buys. A print 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.

A print plan is made up of one or more media buys. A media space buy is made for each publication that is part of the print plan. A print media plan can contain dozens of space buys. Each space buy features up to twelve different insertions for each month of the year.

The print media plan window shows the plan's number, client, title, budget, and space buys. For each space buy you'll see its publication code, publication name, ad/caption, gross cost, and the amount that's been ordered so far.

To find a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Click the [Q] (i.e., Find) button.

3 Enter the print media plan number, or choose a different find option from the Find By pop-up menu.

You can find print media plans by number, client, title, campaign, start date, or sequence (i.e., the order in which they were added). To find a print plan for a selected client: Click the Find button, then choose Client from the pop-up menu. Enter the client number, then click Find. The first print plan for the chosen client appears.

4 Click Find.

■ Click the Next or Previous button to browse through other print media plans.
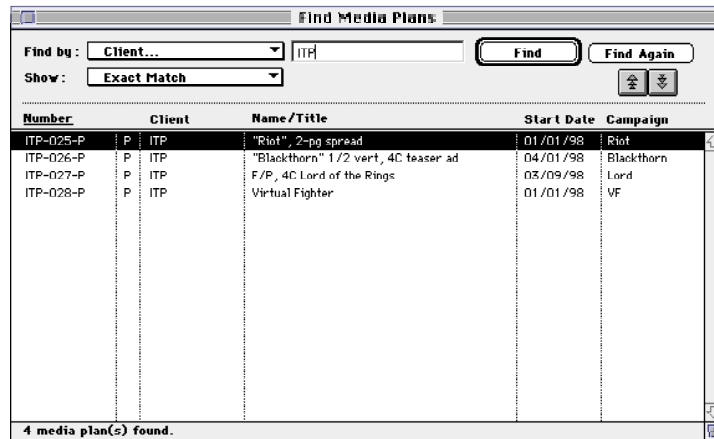
To work with a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print media plan you wish to use.

The Print Media Plan window shows the plan's space buys. From this window use the toolbar buttons to edit, delete, and print this print plan.

Find Media Plans					
Find by :	Client...		ITP	Find	Find Again
Show :	Exact Match				
Number		**Client**	**Name/Title**	**Start Date**	**Campaign**
ITP-025-P	P	ITP	"Riot", 2-pg spread	01/01/98	Riot
ITP-026-P	P	ITP	"Blackthorn" 1/2 vert, 4C teaser ad	04/01/98	Blackthorn
ITP-027-P	P	ITP	F/P, 4C Lord of the Rings	03/09/98	Lord
ITP-028-P	P	ITP	Virtual Fighter	01/01/98	VF

4 media plan(s) found.

The Print Media Plan window

1 Use the window's **find**, next, and previous buttons to locate or browse through media plans.

2 The window's toolbar buttons let you **add**, **edit**, **change periods, delete**, and **print** a media plan.

3 Use these buttons to **add** and **remove** space buys to this print media plan. To edit a space buy, double-click on publication in the list.

4 The **make insertion** button creates insertion orders automatically from a selected space buy.

5 Each print 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.

6 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.

7 The media plan's **name/title** appears here for reference.

8 **The campaign** code is displayed here for easy reference.

9 The media plan's optional **budget**, if entered, appears here.

10 The media plan's space buys are listed by publication. Each space buy contains a publication, the **name** of the ad being placed, the spot's **gross cost**, and the **amount ordered** on insertions so far. Double-clicking on a space buy displays its complete details, including the months in which the ads will run.

Adding a Print Media Plan

Print media plans are added like job tickets: first you'll enter the new plan's client, number, name/title, and description, then add the plan's space buys.

Each print media plan is identified with a plan number. New print plans are numbered automatically by client, but can be changed. You can enter a name/title for the print media plan, as well as a long description. Both fields appear on printed media plans (so clients see this information). The print media plan contains date fields (for date started and date ended), an optional campaign code, and a budget amount. The budget amount is for reference only, and can be ignored; it has no affect on job costing. A print media plan contains one job and task. They are copied automatically to the plan's insertion orders, and can be changed.

Print media plans can be created for three kinds of periods: daily (for newspapers), weekly (for newspapers, journals, and other 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 12-week period. Monthly print media plans let you place ads for up to 12 months.

A print media plan has six optional user-defined fields. These fields are customizable, so can contain any kind of information that isn't already in the plan's description. You can show these fields on custom reports for better media tracking.

Most of the information entered on a print media plan is included on the printed plan that the client will approve. A print media plan can be revised then reprinted any number of times.

To add a new print media plan

1 From the Media window click on the Print Plans button.

Print Plans

The Print Media Plans window opens, listing the last-added print media plan.

2 Click the ![icon] (i.e., Add New Media Plan) button, or choose Add New Print Plan from the Edit menu.

The Add Print Media Plan window opens, prompting you to enter the new plan's client.

3 Enter a client number, or press Tab to open the Clients lookup list.

4 Enter the print media plan's number, or press Tab to keep the automatically-created number.

New print media plans are automatically numbered by client. The automatic number includes the client number, the next plan number, and a code indicating the plan's kind (i.e., "B" for broadcast and "P" for print). The client's media plan number will be incremented when the plan is saved.

5 Choose the print media plan's kind (i.e., daily, weekly, or monthly).

6 Enter the print media plan's name/title, start date, end date, budget amount, campaign, and AE/team.

The name/title should briefly describe the plan's objective. It appears on the printed media plan, so the client will see it. The start and due dates are used by media reports. The plan's budget amount, campaign, and AE/team appear on the printed media plan for reference, but are optional.

7 Enter a job number and task for this print media plan.

A print media plan is opened for one job and task. The media plans themselves don't affect job tickets; instead, only the insertions generated from the media plans update a job and task. All insertion orders created from a plan get the same job number and task. If a default media job and task is entered in the client window, it is copied here.

8 Enter the print media plan's description.

This description can explain in detail the media plan's target market, demographic, scope, or any other kind of information you'd want the client to see on the printed media plan. It does not appear on the plan's insertion orders.

9 Enter the plan's user-defined fields.

The six user-defined fields can be used to store specialized information about a print media plan that otherwise has no place. These fields don't affect job tickets or even the plan's insertion orders. Instead, they only appear on the printed media plan and on custom reports you create with them.

10 Enter the print media plan's approval names.

The names of the people required to approve a print plan should be entered here, whether they are inside or outside the agency.

11 Click Save.

The Add Print Media Plan window

1 Every media plan is opened for one **client**.

2 Every media plan has a unique **number**. They are numbered automatically by client, but can be customized. The media plan number is a combination of the client account number and its special media plan number.

3 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 12-week period. Monthly print media plans let you place ads for up to 12 months.

4 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.

5 **Date started** and **date ended** note when a plan was opened and closed.

6 Enter the optional **budget** amount as the expected total of the media plan's space buys.

7 An optional **campaign** and **brand** name can be used by custom reports to analyze media buys by client.

8 Print media plans can be given an optional **AE/Team** name. Media plans can be analyzed on custom reports by AE/team.

9 Print media plans don't directly affect job tickets until insertion orders are created. A print plan's insertion orders get their **job number** and **task** from these fields. All orders created from this print media plan use the

same job and task.

10 This long **description** explains the plan's objectives, specifications, or other important information. This description appears on the printed media plan, but not on insertion orders.

11 Each print media plan contains six **user-defined fields**. Use these fields to capture key details about the media plan that isn't included in the description. These optional fields can be printed on custom reports.

12 Up to three **approval** names can appear at the bottom of the printed media plan.

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

Adding Buys to a Print Media Plan

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 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. Each space buy features customizable fields that are defined by the media buyer, but typically include a position, size, and description.

■ The Add Space Buy window changes depending on the plan's kind—daily, weekly, or monthly. Regardless of the plan's kind, all space buys appear on media reports together. The media plan's periods (i.e., months of the year, days in the week, etc.) are defined when the plan is added, so can't be changed when adding space buys. Also, different periods can't be mixed on the same print plan (i.e., weekly ads together with monthly ads).

Space buys on print media plans use the Publications table, so you don't need to reenter the publication name. (If you don't know the name of the publication, the lookup list opens automatically.) Ad size and cost information is copied from the Ad Sizes lookup table, and can be changed on a specific media buy.

The first line of each schedule interval tracks the ad size. If the ad size is found in the Ad Sizes table, its cost is copied to the space buy. If the ad size doesn't match, you'll need to enter the cost, position, and other details manually. To see a list of the pub's ad sizes, click the Lookup Ads button to open the lookup list; double-clicking on an ad size copies it to the space buy.

Each space buy also contains the space closing and materials due dates. This information, as well as the space buy's position, description, and cost, is copied to insertion orders automatically. Eventually, the buy's details appear on the client's media invoice.

You can add, change, and remove space buys from a print media plan any time—just like tasks can be added, edited, and removed from jobs. Once you've added all of the media plan's space buys, it can be printed for the client's approval—and the insertion orders created automatically.

To add a space buy

1 From the Print Media Plans window, find a print media plan.

2 Click the 🖐 (i.e., Add Space Buy button) or choose Add Time/Space

Buy from the Edit menu.

The Add Space Buy window opens, prompting you to enter the space buy's publication and ad schedule.
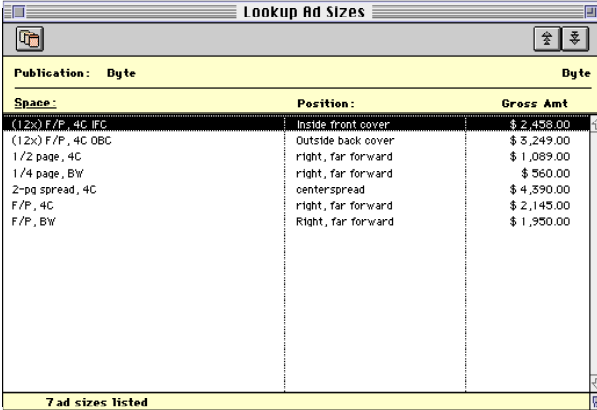
3 Enter the space buy's publication code, then press Tab.

If you don't know the publication code, leave it blank then press Tab to open the Publications lookup list. Double-click on a publication code to copy it to this space buy. You can also add a new publication from the Lookup window by clicking the Add button.

4 Enter the ad code/caption and rate basis.

Both fields appear on the printed media plan for the client's information, and don't affect the ad's actual cost, the job ticket, or the insertion order.

5 Enter the first month's ad by tabbing into the top line of a period, then clicking on the Ads button.

The Ad Sizes lookup list opens, showing the publication's ads. Double-clicking on an ad copies it to the space buy's selected period. Tabbing past the ad size displays the ad's gross amount and description from the Ad Sizes table. If no ad sizes have been set up for this publication, any kind of information can be entered into these fields instead.

6 Enter the ad sizes, etc. for the remaining months that the ad will run, then click Save.

To edit the space buy's important dates

1 Enter the publication, ad/caption, and some ad sizes for the space buy.

2 Click the Edit Dates button.

The Space Close/Materials Due window opens, showing the publications's important dates.

3 Enter the appropriate dates for each ad's space closing and when materials are due. These dates will appear on the insertion order.

4 Click Save.

These changes aren't saved until the plan's space buy is saved.

The Add Monthly Space Buy window

1 A separate space buy is added for each **publication**. If you don't know the publication name, leave the field blank then press Tab. The publication Lookup window opens. Double-click on a publication to copy it to the space buy.

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

3 The **rate basis** field is for reference only, and doesn't affect the ad's cost. It appears for the client's information on the printed media plan.

4 The **Edit Dates** button lets you schedule the ad's space closing and materials due dates for the year (or

week, depending on the plan's schedule).

5 You can schedule ads to run in the same publication in any of the twelve months. Each month contains three customizable fields plus the ad's cost. The first line contains the ad size. The second line contains the ad's position, or some kind of special placement. The third line contains an additional caption or description of the ad.

6 Click the **lookup ads** button to see the publication's ad sizes. This lookup window opens only if you've selected the first line for each month.

7 The ad's gross cost (i.e., the amount the client will pay, including your commission) is entered here. The ad's net cost will be calculated using the

gross cost and the plan's media commission.

8 The optional **buy notes** are user-defined, but apply to all ads running for the space buy. Since buy notes appear on the printed insertion order (they're combined with the position information), they can contain special instructions for the publication.

The Add Daily Space Buy window

1 A separate space buy is added for each **publication**. If you don't know the publication name, leave the field blank then press Tab. The publication Lookup window opens. Double-click on a publication to copy it to the space buy.

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

3 The **rate basis** field is for reference only, and doesn't affect the ad's cost. It appears on the printed media plan.

4 The **Edit Dates** button lets you schedule the ad's space closing and materials due dates for the year (or week, depending on the plan's schedule).

5 You can schedule ads to run in the same publication in any of the seven days. Each day contains three customizable fields plus the ad's cost. The first line contains the ad size. The second line contains the ad's position, or some kind of special placement. The third line contains an additional caption or description of the ad.

6 Click the **lookup ads** button to see the publication's ad sizes. This lookup window opens only if you've selected the first line for each month.

7 The ad's **gross costs** (i.e., the amount the client will pay, including your commission) is entered here. The ad's net cost will be calculated using the gross cost and the plan's media commission.

8 The daily schedule can automatically be repeated for a set number of

weeks. The starting week and the number of repeated schedules are choosen by you.

9 The optional **buy notes** are user-defined, but apply to all ads running for the space buy. Since buy notes appear on the printed insertion order (they're combined with the position information), they can contain special instructions for the publication.

The Add Weekly Space Buy window

1 A separate space buy is added for each **publication**. If you don't know the publication name, leave the field blank then press Tab. The publication Lookup window opens. Double-click on a publication to copy it to the space buy.

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

3 The **rate basis** field is for reference only, and doesn't affect the ad's cost. It appears on the printed media plan.

4 The **Edit Dates** button lets you schedule the ad's space closing and materials due dates for the year (or week, depending on the plan's schedule).

5 You can schedule ads to run in the same publication in any of the twelve weeks. Each week contains three customizable fields plus the ad's cost. The first line contains the ad size. The second line contains the ad's position, or some kind of special placement. The third line contains an additional caption or description of the ad.

6 Click the lookup **ads** button to see the publication's ad sizes. This lookup window opens only if you've selected the first line for each month.

7 The ad's gross cost (i.e., the amount the client will pay, including your commission) is entered here. The ad's net cost will be calculated using the gross cost and the plan's media commission.

8 The optional **buy notes** are user-defined, but apply to all ads running for the space buy. Since buy notes appear on the printed insertion order (they're combined with the position information), they can contain special instructions for the publication.

Working with Print Media Plans

To edit a print media plan

Everything about a print media plan can be edited, except for the client number and the media plan number.

1 From the Media window click on the Print Plans button.

Print Plans

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to change.

3 Click the [icon] (i.e., Edit) button.

The Edit Print Media Plan window opens, displaying the plan's number, name, description, schedule, and other details.

4 Make your changes.

For flexibility, you can change the print media plan's schedule—the weeks or months during which the ads will run. But the changes you make will affect existing space buys, which may be undesirable. If you've already made insertion orders for the plan's buys, do not change the schedule.

5 Click Save.

To delete a print media plan

A print media plan can be deleted anytime before insertions are created. Once you've ordered space for the media plan, it can't be deleted (unless you delete the insertion order first).

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to delete.

3 Click the [icon] (i.e., Delete) button.

Print Media Plans – Dates

MacWorld

Period:	Space Close:	Materials Due:	Ordered on:	Date:
Jan				
Feb				
March				
April				
May				
June				
July				
August				
Sept				
Oct				
Nov				
Dec				

[Cancel] [Save]

To print a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to print.

3 Click the [icon] (i.e., Print) button.

To change a buy on a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to change.

3 Double-click once on a space buy. Or, click once on a space buy to select it then click the Edit Buy button.

4 Make your changes, then click Save.

Space buys on a print media plan can be deleted anytime before insertions are added. Once you've ordered space for the media buy, it can't be deleted (unless you delete the insertion order first).

To delete a buy from a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to change.

3 Click once on a space buy to select it.
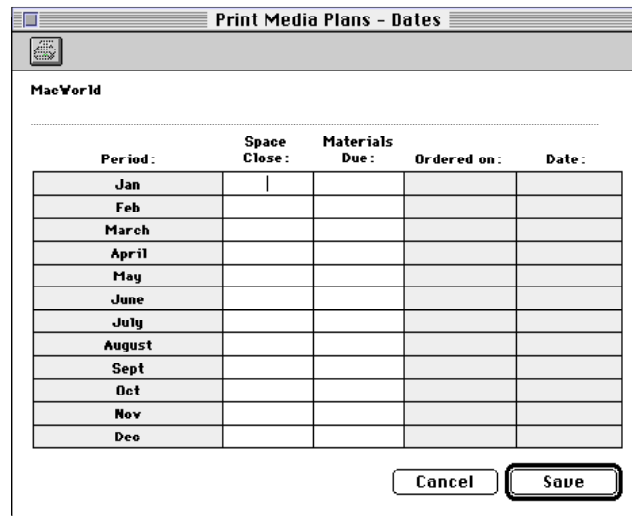
4 Click the ⬦ (i.e., Remove) button.

To change a print media plan's schedule periods

1 From the Media window click on the Print Plans button.

The Print Media Plans
window opens, listing the
last-added print media plan.

2 Find the print plan you
wish to change.

3 Click the ▦ (i.e., Edit
media plan's periods)
button.

The current schedule periods
will appear.

4 Make your changes, then
click Save.

Editing the periods affects
all buys on this media plan.

▤□	Change Periods		
Number:	OFF-826-P		
Client:	OFFICE Corporation		

This media plan is a Weekly

Buy periods:

02/01/98	02/08/98	02/15/98	02/22/98
03/01/98	03/08/98	03/15/98	03/22/98
03/29/98	04/05/98	04/12/98	04/19/98

Cancel   **Save**

To edit a print media plan's space closing and material due dates

1 From the Media window, click on the Print Plans button.
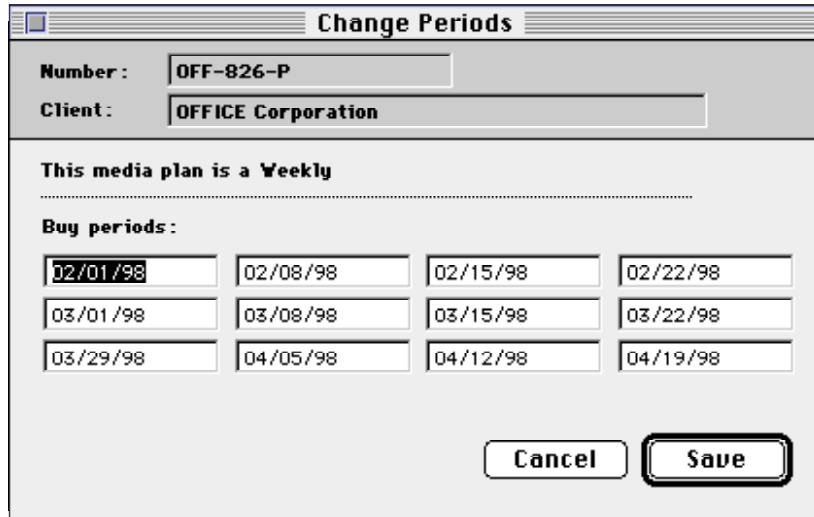
The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to change.

3 Double-click on a space-buy.

4 Click on the Edit Dates button.

5 Make your changes, then click Save.

Making Insertion Orders from Print Media Plans

Insertion orders can be created automatically from print media plans and media estimates. This option can save hours of data-entry time, since there's nothing to reenter. Instead, the information from the media plan—the publication, issue date, ad#/caption, position, cost, and dates—are copied directly to new insertion orders.

Creating automatic insertion orders is easy: find the media plan or estimate, select the space buy, then click the Make Insertion button. A list of the print media plan's buys will be listed. Marking the check box next to a buy will include it on the insertion order. You'll have the option to create one insertion for each buy, or a single insertion order that shows all unordered media buys. Use this option, for example, to create an insertion order for the year's ads for one publication.

Automatic insertion orders use the same media preferences as manually added insertion orders. That is, they're numbered in the same order and have the same settings (such as the disclaimer).

Once the new insertion order is saved, it can be reviewed, edited, and printed from Purchase/Insertion Orders. In addition, insertion orders (whether or not they're created automatically) can be prebilled from the Purchase Orders window.

There are slight differences between insertion orders created from print media plans vs. media estimates. Since media estimates are completely customizable, the insertion order's column headings may vary from insertion to insertion. The column headings on insertion orders made from print media plans will always be consistent.

To create an insertion from a print media plan

1 From the Media window click on the Print Plans button.

The Print Media Plans window opens, listing the last-added print media plan.

2 Find the print plan you wish to use.

3 Click the Make Insertion button.

The Make Insertion Order window opens listing all the buys for this plan.

4 Mark the check box next to each buy you wish to include on the insertion order.

Each space buy will be added as a line item on the insertion order.

■ To create separate insertion orders for each space buy, click the *Separate insertion order for each buy* option.

5 Click OK.

After a few seconds, the insertion order is saved. Once saved, it can be printed from Purchase/Insertion Orders.

The Make Insertion Order window

Click the Make Insertion button to automatically make insertion orders from print media plans or media estimates.

1 The media plan (or media estimate) **name/title** appears here for easy reference.

2 Mark the check box next to a space buy to include it on this insertion order.

3 This is the name of the currently selected **publication**.

4 The space buy's scheduled month will be listed. For daily or weekly publications the day or week will be listed instead.

5 The ad's **space** describes it's location within the publication.

6 The space buy's gross cost.

7 To create separate insertion orders for each of the media buy's issues, use the **separate insertion orders for each buy** option. This option creates a separate insertion order for each issue date. For example, a full year's worth of ads for a yearly publication will generate twelve separate insertion orders. They'll have different issue dates, but all will have the same order date.

Insertion Orders

Any kind of ad space ordered on behalf of a client should be tracked with insertion orders. They are essential for accurate job costing. They allow media costs to be committed to a job before the publication's invoice is posted. You'll know at any given time how much media space is ordered.

Insertion orders are designed primarily for print space buys, but are completely customizable. The insertion order's field labels can be easily tailored for outdoor, internet, and other types of media. Insertion orders can be added by users, or created automatically from media estimates. Once insertion orders are saved, they can be pre-billed immediately (showing one insertion order by client invoice) or billed in batches on a media invoice. For easy reconciliation, each space buy is updated with the A/R invoice number and the billed amount once the insertion order is invoiced.

When the ad eventually runs, it will be invoiced by the pub. As the pub's invoice is posted, the insertion order's balance decreases. The open purchase/insertion order report keeps a running balance of open commitments, showing how much you've ordered that hasn't been invoiced by its pubs. Once the invoice is posted into A/P, an insertion order can't be changed.

Insertion orders have separate preferences from purchase orders. The agency name, address, disclaimer, and logo can be different than purchase orders. (This is especially useful for in-house agencies that need to maintain a separate identity from the corporation in order to get agency discounts.) Insertion orders are numbered separately from purchase orders, and have a unique numbering sequence to keep them apart.

The vendor's rep name, phone, and fax number are copied from the Publication Table when an insertion order is added, but can be edited directly on the insertion order through the Vendor Info window if needed.

Insertion orders can be cloned, like purchase orders. Cloning an existing insertion order makes an exact duplicate that you can modify then print. Changing the new insertion order doesn't affect the original insertion order.

■ Anyone can add an insertion order if they have the access privileges to

purchase orders. Also, insertion orders can be added from any computer running Clients & Profits. Many users can add IOs at the same time.

To add an insertion order

1 Choose Accounting > Purchase/Insertion Orders.

2 Choose Edit > Add > Insertion Order.

The Add Insertion Order window opens. The new insertion may be numbered automatically (based on your preferences); if so, you'll see the next number. If not, you can enter your own insertion order number.

The **insertion order number** can contain any combination of letters, numbers, and symbols. The number is limited to twelve characters.

3 Enter the new insertion order's vendor number.

Insertion orders are added for one vendor, so a vendor number is required. One vendor can produce many publications so the specific publication name is entered on the Publication field.

■ If you don't know the vendor number, leave it blank then press Tab. The vendor lookup list opens, displaying your vendors. Double-click on a vendor to copy its number to your new insertion order.

4 Enter the insertion order's job and task.

The insertion order must have a job and task for accurate cost tracking. When the insertion order is saved, the media's cost will update the job task's Net POs balance.

5 Enter the publication, issue date, ad/caption, and other details.

These fields appear in the body of the printed insertion order. The standard settings are designed for typical print buys, but can be customized (without affecting other insertion orders).

The Add Insertion Order window

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. Insertion orders have a different numbering sequence than purchase orders.

2 An IO has only one **vendor**. It is usually the company that owns the publication (or it might be the publication itself).

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

4 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.

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

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

8 The **issue date** shows the 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/capation 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. **Materials due** is the date on which the ad's film, disk, or other materials must reach the publication.

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

12 **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.

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

14 **Added by** shows who added the insertion order.

Insertion Orders (con't)

The **ad#/caption** field contains some kind of reference to help the client and the publication track the ad. It can be the ad's headline, tagline, or a marketing code. It's completely customizable and appears on the client's media invoice. The **position** field is a long block of text that can include information, special instructions, or notes about the space order. This text appears on the printed insertion order, so don't enter anything confidential or proprietary. The label named "position" can be customized.

6 Enter the ad's gross cost, commission, and net cost.

The ad's **gross cost** is the amount you will eventually charge the client, including your agency commission. The media **commission** percentage is copied from the vendor account. It can be customized on an insertion order without affecting other orders. The commission is used to calculate the ad's net cost automatically. If the ad has no commission, enter the commission percentage as zero. The ad's **net cost** is the amount you'll pay the publication, less your agency commission. When the publication invoices you for this ad, the invoice amount should match the insertion's net cost—if not, you'll be either over or under budget.

7 Click Save.

Once the new insertion order is saved, it can be printed, revised, and reprinted many times.

Pre-billing an insertion order

Insertion orders can be pre-billed directly from the Purchase/Insertion Order window. The pre-bill invoice shows the insertion order's publication, issue date, gross cost, and other details. Many insertion orders can be billed on the same invoice by adding a media billing in Accounts Receivable. The media invoice shows each insertion order's publication, issue date, ad/caption, and other details. For more information, see page 4-17.

To edit an insertion order

Printing copies. Since laser printers can't use multi-part forms, Clients & Profits prints up to five copies on an insertion order. A copy will be printed on plain paper for any distribution name entered into the Options window.

An insertion order can be edited and reprinted as many times as needed. The Edit Insertion Order lets you change the vendor, order date, and other details. If an insertion order has only one media buy (i.e., line item), everything about the order, including amounts, can be edited. If the insertion has multiple media buys, only the order date, status, and position can be changed here.

1 From the PO/IO window click the Description button.

2 Enter your changes, then click Save.

To add additional media buys to an insertion order

An insertion order can contain dozens of different media buys for one vendor. Each media buy can specify a different ad to run, a another set of run dates, or a special space buy for a certain ad. Each media buy will appear as a separate line on the printed insertion order, as well as the client's A/R invoice. When the vendor's media invoice is eventually entered, you'll also reconcile A/P and insertion orders line-by-line.

1 Click the ![icon] (i.e., Add Buys) button, or choose Edit > Add Amounts.

2 Enter the new media buy's details (especially its line number, which is crucial for accurate A/P reconciliation) then click Save.

To edit a media buy on an insertion order

1 From the PO/IO window, double-click on a media buy.

2 Make your changes, then click Save.

■ For information on removing amounts from orders, making revisions, pre-billing, and updating order status see the Editing Purchase Orders section on page 3-14.

To print an insertion order

1 Choose File > Print Purchase Orders, or click the ![icon] (i.e., Print Form) button.
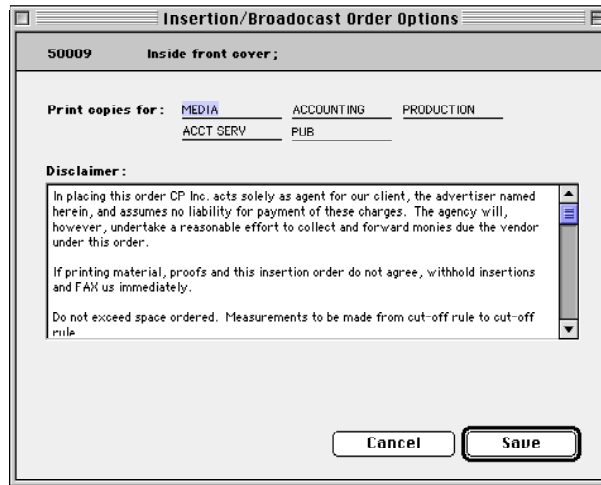
The Edit Buy window

1 The **vendor name** is the publisher. Only one vendor can be added to each insertion order.

2 The **balance** is the difference between the line item's net cost and the actual cost from the order's posted A/P invoices.

3 The **line number** identifies particular media buys on the IO.

4 Every media buy needs a **job** and **task** for accurate cost accounting. The insertion's cost will update the job task's Net POs total.

5 The **publication** is copied from the Publication table or entered manually. To see the Publication lookup list, leave the field empty then press Tab.

6 The **issue date** describes when the ad will run. The **ad#/caption** is used to identify the particular advertise-

ment that will run in the publication. If the **ad size** field is empty, pressing Tab will open the pop-up Ad Sizes lookup list. This lookup list shows the publication's ad sizes and rates. Double-clicking on an ad size copies its information to the media buy. All of these description fields are user-defined and optional.

7 The **bill net, not gross** option lets you pass the ad's true cost along to the client, without any agency commission. This option applies only to clients that pay a retainer to you for media planning, they pay only the ad's net cost.

8 The **ad/size** is entered as the combination of the media buy's ad number/caption and the ad's size, but is customizable. Anything that effectively describes the media buy can be entered here. It appears on the printed insertion order and the A/R invoice.

9 **Space close** is the date on which you must place this order with the publication. **Materials due** is the date on which the ad's film, disk, or other materials must reach the publication.

10 The media buy's **notes** are optional. They can be used for instructions specific to certain line items on the insertion order. They appear on the printed insertion order.

11 **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.

12 When an insertion order is billed in A/R, the media buy's **billed on A/R#** details are updated. The media billings's invoice number and billing amount appear here with the invoice is posted.

Broadcast Media Plans

Broadcast media plans can be created for many kinds of radio, television, cable, or even Internet-based media buys. Like a print plan, 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.

A broadcast media plan is made up of one or more media buys. A broadcast spot buy (usually a specific time or program) is made for each station that is part of the media plan. A broadcast media plan can contain dozens of time/program spot buys. You'll enter the flight's beginning and ending dates on the broadcast plan. Each spot can be run any number of times during the two-week flight.

The broadcast media plan window shows the plan's number, client, title, budget, and media buys. For each spot buy you'll see its station, time/program code (or name), total spots, total rating points ordered, gross cost, and number of times per day that the spots will run.

To find a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Click the 🔍 (i.e., Find) button.

3 Enter the broadcast plan number, or choose a different find option from the Find By pop-up menu.

You can find broadcast media plans by number, client, title, campaign, start date, or sequence (i.e., the order in which they were added). To find a broadcast plan for a selected client: Click the Find button, then choose Client from the pop-up menu. Enter the client number, then click Find. The first broadcast plan for the chosen client appears.

4 Click Find.

■ Click the Next or Previous button to browse through other broadcast media plans.

To work with a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast media plan you wish to use.

The Broadcast Media Plan window opens, showing the plan's space buys. From this window use the toolbar buttons to edit, delete, and print this broadcast plan.

Find Media Plans

| Find by: | Client... | ABI | Find | Find Again |

| Show: | Exact Match |

Number		Client	Name/Title	Start Date	Campaign
ABI013	P	ABI	Pipeline – Print Buys (Southwest)	01/01/96	
ABI014	P	ABI	Pipeline – Print Buys (Canada)	01/01/96	
ABI015	P	ABI	Pipeline – Print Buys (Mexico)	01/01/96	
ABI016	P	ABI	Pipeline – Print Buys (UK)	01/01/96	
ABI017	P	ABI	Pipeline – Print Buys (Japan)	01/01/96	
ABI018	P	ABI	Pipeline – Print Buys (Asia)	01/01/96	
ABI019	P	ABI	Pipeline – Print Buys (Trade)	01/01/96	
ABI020	P	ABI	Recruitment	01/01/96	
ABI021	P	ABI	IPO Print Media (Pending)	01/01/96	
ABI023	P	ABI	Print Media Plan – WWW phase 1	01/01/96	
ABI024	P	ABI	Print Media Plan – WWW phase 2	01/01/96	
ABI001	P	ABI	1996 Print Media Plan	01/01/96	
ABI002	P	ABI	Comdex Media Plan	01/01/96	
ABI003	P	ABI	Summer 96 Edge Runners – Magazines	01/01/96	
ABI004	P	ABI	Summer 96 Edge Runners – Newspapers	01/01/96	
ABI005	P	ABI	Power Pipes – Trade Mag FY95	01/01/96	
ABI006	P	ABI	Power Pipes – Trade Mag FY96	01/01/96	

42 media plan(s) found.

Finding media plans. Broadcast and print media plans can be easily found by plan order, client number, name/title, start date, or campaign. Double-clicking on a media plan in the Find list displays its full details, including its buys.

The Broadcast Media Plan window

Broadcast Media Plans

	Number :	OFF006 ❻		Campaign :	
	Client :	OFF OFFICE Corporation		Budget :	$8,000.00
	Name/Title :	Behavior Management TV Schedule		Buyer :	ML
	Flight dates :	July 1 – July 20, 1999			

X	Station :	Dates :	Time/Program :	Length :	Spots	Rating	Gross/Each :
	KCLO	7/1–7/30	Maury Povich 2p-3p	:60	3	1.9	$ 50.00
	KOTA	7/1–7/18	Good Morning Amer	:60	4	5.0	$ 75.00
	KOTA	7/1–7/18	Jeopardy	:60	2	4.0	$ 60.00

Status: 199 Pending Client Approval

TOTALS: Spots: 9   CPP: $ 16.91
Rating: 33.70   CPS: $ 63.33
Cost: $ 570.00

1 Use the window's **find**, **next**, and **previous** buttons to locate or browse through media plans.

2 The window's toolbar buttons let you **add**, **edit**, **delete**, and print a broadcast media plan.

3 Use these buttons to **add** and **remove** space buys to this broadcast media plan. To edit a space buy, double-click on the station in the list.

4 Click the **broadcast 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 rating for each station and for the entire plan.

5 The **make insertion** button creates insertion orders automatically from a selected space buy.

6 Each print 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. 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 media plan's **name/title** appears here for reference.

7 The **campaign** code is displayed here for easy reference. The media plan's optional **budget**, if entered, appears here. The **buyer** initials are copied as the person adding the media plan, but can be changed.

8 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.

9 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.

Adding a Broadcast Media Plan

Broadcast media plans are added like job tickets: first you'll enter the new plan's client, number, name/title, and description, then add the plan's spot buys.

Each broadcast media plan is identified with a plan number. New broadcast plans are numbered automatically by client, but can be changed. You can enter a name/title for the broadcast media plan, as well as a long description. Both fields appear on broadcast media plans (so clients see this information). The broadcast media plan contains date fields (for date started and date ended), an optional campaign code, and a budget amount. The budget amount is for reference only, and can be ignored; it has no affect on job costing. A broadcast media plan contains one job and task. They are copied automatically to the plan's insertion orders, and can be changed.

The broadcast media plan contains spots planned to run over a two-week period, called a flight. The flight schedule specifies the time frame over which the spots will be shown. Flight dates are customizable, and appear as column headings for the spot buys. When you enter in the first day of the flight, the following fourteen days are entered automatically.

A broadcast media plan has six optional user-defined fields. These fields are customizable, so can contain any kind of information that isn't already in the plan's description. You can show these fields on custom reports for better media tracking.

Most of the information entered on a broadcast media plan is included on the printed broadcast plan that the client will approve. A broadcast media plan can be revised then reprinted any number of times.

1 From the Media window click on the Broadcast Plans button.

Broadcast Plans

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Click the ![icon] (i.e., Add New Media Plan) button, or choose Add New Broadcast Plan from the Edit menu.

The Add Broadcast Media Plan window opens, prompting you to enter the new plan's client.

3 Enter a client number, or press Tab to open the Clients lookup list.

4 Enter the broadcast media plan's number, or press Tab to keep the automatically-created number.

New broadcast media plans are automatically numbered by client. The automatic number includes the client number, the next plan number, and a code indicating the plan's kind (i.e., "B" for broadcast and "P" for print). The client's media plan number will be incremented when the plan is saved.

6 Enter the broadcast media plan's name/title, start date, end date, budget amount, campaign, and AE/team.

The name/title should briefly describe the plan's objective. It appears on the printed media plan, so the client will see it. The start and due dates are used by media reports. The plan's budget amount, campaign, and AE/team appear on the printed media plan for reference, but are optional.

7 Enter a job number and task for this broadcast media plan.

A broadcast media plan is opened for one job and task. The media plans themselves don't affect job tickets; instead, only the broadcast orders generated from the media plans update a job and task. All broadcast orders created from a plan get the same job number and task. If a default media job and task is entered in the client window, it is copied here.

8 Enter the broadcast media plan's description.

This description can explain in detail the media plan's target market, demographic, scope, or any other kind of information you'd want the client to see on the printed media plan. It does not appear on the plan's broadcast orders.

9 Enter the days of the plan's flight (i.e., the days during which the spots will run).

10 Enter the plan's user-defined fields.

The six user-defined fields can be used to store specialized information about a broadcast media plan that otherwise has no place. These fields don't affect job tickets or even the plan's broadcast orders. Instead, they only appear on the printed media plan and on custom reports you create with them.

11 Click Save.

The Add Broadcast Media Plan window

1 Every media plan is opened for one **client**.

2 Media plans are numbered automatically. Media plans are numbered separately by client. Each client has a special **media plan number**. The media plan number is a combination of the client account number and its special media plan number. The client's media plan number increments automatically as each new plan is saved. The media plan number is customizable.

3 The **name/title** appears on the printed media plan. It should be a brief description of the plan's objective.

4 Each time the broadcast plan is changed the **revision** number can be

manually incremented to show the number of revisions made. The previous revisions are not retained. Revision zero appears as *Original* on the printed Broadcast Worksheet and the printed Broadcast Media Plan.

5 **Date started** and **date ended** track when the plan was opened and closed. An optional **campaign** code can be used by custom reports to analyze media buys by client. Broadcast media plans can be given an optional **AE/Team** name. Media plans can be analyzed on custom reports by AE/team.

6 Enter the optional **budget** amount as the expected total of the media plan's spot buys.

7 Broadcast media plans don't directly

affect job tickets until broadcast orders are created. A media plan's broadcast orders gets their **job number** and **task** from these fields. All orders created from this broadcast media plan use the same job and task.

8 This long **description** explains the plan's objectives, specifications, or other important information. This description appears on the printed media plan, but not on broadcast orders.

9 The broadcast plan's two-week **flight schedule** is customizable. These are the days on which the spots will run.

10 Each broadcast media plan contains six **user-defined fields**. Use these fields to capture key details

about the media plan that isn't included in the description. These optional fields appear on the Broadcast Worksheet and can be printed on custom reports.

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

12 The **commission** percentage is copied from the client file, but can be changed here.

Adding Buys to a Broadcast Media Plan

The broadcast media plan is incomplete without spot buys for times and programs. A separate spot buy is added for each time or program during which the ad will run. So a broadcast plan could have dozens of buys for different stations and programs. There's no limit to the number of stations and programs that can be ordered for the plan's two-week flight.

Spot buys on broadcast media plans use information from the Stations table, so you don't need to reenter the station name and address. (If you don't know the name of the station, the lookup list opens automatically.) Time, program, rating, and cost information is copied from the Times/Programs table, and can be customized on any spot buy. The time/program name is important. If the time/program name is found in the Times/Programs table, its rating cost is copied to the space buy. If the name doesn't match, you'll need to enter the program's rating and per-spot cost manually. To see a list of the station's times and programs, click the Lookup Times/Programs button to open the lookup list; double-clicking on a time/program copies it to the spot buy.

You'll enter the number of times a spot will run during each day of the flight. Clients & Profits Pro calculates the buy's total cost, rating, number of spots automatically. This information appears on the printed broadcast plan and media worksheet.

You can add, change, and remove spot buys from a broadcast media plan any time—just like tasks can be added, edited, and removed from jobs. Once you've added all of the media plan's spot buys, it can be printed for the client's approval.

To add a broadcast spot buy

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to use.

3 Click the Add Spot Buy button.

4 Enter the spot buy's station code, then press Tab.

If you don't know the station code, leave it blank then press Tab to open the lookup list. Double-click on a station to copy it to this spot buy. You can also add a new station from the Lookup window by clicking the Add button.

5 Enter the dates, days, and times these spots will run.

6 Enter the time or program.

To see a list of the station's times and programs, click on the Lookup

Times/Programs button. Double-clicking on a time/program copies it to the spot buy. If the time/program has been already set up, its rating and cost will appear automatically.

7 Enter the name/title for the spot that will run on this station.

8 Enter the total number of times the spot will run during the flight.

9 Enter the length of each spot (e.g., *:30* for 30 seconds).

10 Enter the optional buy notes, then click Save.

The Add Broadcast Buy window


```
┌──────────────────────────────────────────────────────────────────┐
│ ▣ ▢          ════════ Add Broadcast Buy ════════                    │
├──────────────────────────────────────────────────────────────────┤
│                                                                      │
│  OFF          OFFICE Corporation                        ❶           │
│  OFF-827-B    1998 Media Planning – Broadcast                        │
│  ─────────────────────────────────────────────────────────          │
│                                                                      │
│  Flight dates:   ┌──────────────────────────────┐      ❷           │
│                  └──────────────────────────────┘                    │
│  Station:    ❸  _____   [⌨]                                    │
│  Dates:      ❹  _____    ┌────────────────────────┐   │
│  Days:          MTWTFSS                 │ Space close:   _____ │ ❺ │
│  Times:         _____             │ Materials due: _____ │   │
│  Time/Pgm:   ❻  _____     └────────────────────────┘   │
│  Spot Name:  ❼  _____ ( Lookup Times/Programs )   │
│                                                                      │
│  Spots:         _____ ❽    Notes: ┌──────────────────────┐ ⬆     │
│  Length:        _____               │                      │        │
│❿ Gross/each:    _____           │          ❾           │        │
│  Rating:        _____               │                      │ ⬇     │
│                                     └──────────────────────┘        │
│  Total Rating: .............. ⓫                                     │
│  Total Cost:   ..............                                        │
│  Ordered:    ⓬  ..............           ( Cancel )  (( Save ))     │
│                                                                      │
└──────────────────────────────────────────────────────────────────┘
```

1 The client and broadcast plan title appear here for reference.

2 The **flight dates** are copied from the broadcast plan.

3 A separate spot buy is added for each time or program during which the spot will run. If you don't know the **station code**, leave the field blank then press Tab. The stations Lookup window opens. Double-click on a station to copy it to the spot buy. The **address** button lets you change the station's address for this spot buy only (the station's regular address is unaffected).

4 The **dates**, **days** of the week, and **times** this spot will run are entered here.

5 The **space close** and **materials due** dates listed here will appear in the Media window to remind you of the upcoming space and traffic deadlines.

6 The spot runs during a specific program or, if the program isn't important, a time of day. The **time/program** field contains the name of the time or program for the station. It uses the Time/Program/Contract Rates table to save time, but you can enter your own times/programs directly if needed. If the time/program has been set up in the Time/Program table, its rating and cost will be copied to the spot buy; otherwise, you'll need to enter the rating and cost manually. Click on the **Lookup Times/Programs** button to see the station's time and programs. This lookup window opens only if you've selected the first line for each month.

7 The **spot name** identifies the ad on the printed broadcast media plan. Any kind of description text or code can be used. (It is similar to the ad#/caption in print media plans.)

8 Enter the number of times the spot will run here.

9 Use the **buy notes** to describe the spot buy's specifications, objectives, or special instructions.

10 The program's **rating** and **cost** are copied from the Times/Programs table, if available. The rating and cost for each program can customized without affecting the Times/Programs table.

11 The total number of spots, total rating, and gross cost are calculated automatically based on the flight and the show's rating information.

12 Once a broadcast order is generated for this buy, the order number will be referenced here.

Working With Broadcast Plans

To edit a broadcast media plan

Everything about a broadcast media plan can be edited, except for the client number and the media plan number.

1 From the Media window click on the Broadcast Plans button.

Broadcast Plans

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to change.

3 Click the ![Edit] (i.e., Edit) button.

The Edit Broadcast Media Plan window opens, displaying the plan's number, name, description, flight dates, and other details.

4 Make your changes.

5 Click Save.

To delete a broadcast media plan

A broadcast media plan can be deleted anytime before broadcast orders are created. Once you've ordered spots for the media plan, it can't be deleted (unless you delete the broadcast order first).

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to delete.

3 Click the ![Delete] (i.e., Delete) button.

To print a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to print.

3 Click the ![Print] (i.e., Print) button.

To print a broadcast media worksheet

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to print.

3 Click the ![Print Worksheet] (i.e., Print Broadcast Media Worksheet) button.

The Broadcast Media Worksheet shows more detail than the Broadcast Media Plan.

To change a buy on a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to change.

3 Double-click once on a broadcast buy. Or, click once on a buy to select it then click the Edit Buy button.

4 Make your changes, then click Save.

Buys on a broadcast media plan can be deleted anytime before broadcast orders are added. Once you've ordered space for the media buy, it can't be deleted (unless you delete the broadcast order first).

To delete a buy from a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to change.

3 Click once on a broadcast buy to select it.

4 Click the ![Remove] (i.e., Remove) button.

Making Broadcast Orders from Broadcast Media Plans

Broadcast orders can be created automatically from broadcast media plans. This option can save hours of data-entry time, since there's nothing to reenter. Instead, the information from the media plan—the station, flight dates, program, rating, and costs—are copied directly to the new broadcast orders.

Creating automatic broadcast orders is easy: find the media plan, select the space buy, then click the Make Broadcast Orders button. A list of the broadcast media plan's buys will be listed. Marking the check box next to a buy will include it on the broadcast order. A separate broadcast order will be created for each station. Each buy for a station will appear as a line item on the broadcast order.

Automatic broadcast orders use the same media preferences as manually added insertion/ broadcast orders. That is, they're numbered in the same order and have the same settings (such as the disclaimer).

Once the new broadcast order is saved, it can be reviewed, edited, and printed from Purchase/ Insertion Orders. In addition, broadcast orders (whether or not they're created automatically) can be prebilled from the Purchase Orders window.

To create a broadcast order from a broadcast media plan

1 From the Media window click on the Broadcast Plans button.

The Broadcast Media Plans window opens, listing the last-added broadcast media plan.

2 Find the broadcast plan you wish to use.

3 Click the Make Broadcast Orders button.

The Make Broadcast Order window opens listing all the buys for this plan.

4 Mark the check box next to each buy you wish to include on the broadcast order.

Each space buy will be added as a line item on the broadcast order.

5 Click OK.

After a few seconds, the broadcast order is saved. Once saved, it can be printed from Purchase/Insertion Orders.

X	Station	Dates	Days	Times	Daypart/Program	Spots	Gross Amt
☒	KFI				Dr. Dean	27	$ 899.91
☒	KABC				Simpsons	20	$ 440.00

HOTEL Corporation
HOTEL Media Plan – Broadcast   Flight Dates:

Printing copies. Since laser printers can't use multi-part forms, Clients & Profits prints up to five copies on an insertion order. A copy will be printed on plain paper for any distribution name entered into the Options window.

Broadcast Orders

Radio, cable, and broadcast television spots ordered on behalf of a client should be tracked with broadcast orders. Like purchase and insertion orders, they are essential for accurate job costing. They allow media costs to be committed to a job ticket before the station's invoice is posted. This way you'll know at any given time how many media spots have been ordered.

Broadcast orders can be added one-by-one by media buyers, created automatically from media estimates, or imported from media buying systems like TAPSCAN, SmartPlus, or Strata using the optional C&P Media Link. Once broadcast orders are saved, they can be pre-billed immediately or billed on a media invoice. For easy reconciliation, each buy on the broadcast order is updated with the A/R invoice number and the billed amount once the broadcast order is invoiced. When the media buys eventually run, they will be invoiced by the station. The station's invoices are entered into Accounts Payable, referencing their broadcast orders. As the media A/P invoice is posted, the broadcast order's balance decreases.

■ Anyone can add a broadcast order if they have the access privileges to purchase orders. Also, broadcast orders can be added from any computer running Clients & Profits. Many media buyers can add orders at the same time.

The same general rules for adding, editing, and printing purchase orders apply to insertion orders and broadcast orders.

To add a broadcast order

Like insertion orders, broadcast orders are added in two steps: first the header then the media buys. The order's header contains the vendor, date, ad name, flight dates, and description.

1 From the Purchase/Insertion Orders choose Edit > Add Broadcast Order.

The Add New Broadcast Order window opens, prompting you to enter the new order's header information.

Broadcast orders. 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.

2 Press Tab to keep the broadcast order's order number.
New broadcast orders are numbered automatically based on your preferences, but the number can also be entered manually. The broadcast order number is limited to twelve characters.

3 Enter the broadcast order's station (i.e., vendor).

The same vendor list is used for purchase, insertion, and broadcast orders. If you don't know the vendor number, leave it blank then press Tab open the vendor lookup list. Double-click on a vendor to copy its number to your new broadcast order.

4 Enter the order date, commission, flight dates, ad name, and other details about this order.

The commission percentage is copied from the vendor account, but can be changed on a broadcast order without affecting other orders. These fields appear in the heading of the broadcast order. The standard field headings are designed for typical spot buys, but can be customized.

5 Enter the additional instructions and the traffic instructions.

These fields provide space for a long block of text. This text appears in the printed broadcast order.

6 Enter the broadcast order's job and task.

The broadcast order must have a job and task for accurate cost tracking. When the order's buys are saved, the job task's Net PO balance is updated.

7 Enter the media buyer and media rep approval lines.

The approval lines print on the broadcast order with instructions for the media rep.

8 Click Save.

To add media buys to a 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. Each media buy includes informa

The Add New Broadcast Order window

Add New Broadcast Order

Number:	50017 ❶	
Station (vendor):	COX4 ❷ Cox Cablevision 4	Ordered by: BP ❸
Order date: ❹	06/11/99 Commission: 15.00	
Flight dates:	8/1 – 8/31/99	Campaign: "Here & Now" ❻
Broadcast month:	August 1999 ❺	Brand: OneLink
Ad name:	"One Link, Here & Now"	
Market:	Southern California	Materials due: 07/18/99
Product:	OneLink/Intro ❼	Contract No. 1087398-2

Desc:
Refer to approved calendar. OBB/CBB, 10x:30/game, 28 promo mentions/wk. Product exclusivity. ❽

Add'l Instructions:
Spots must run within scheduled flight dates and must be approved in advanced by the buyer. All invoices must exactly match this broadcast order. Invoices are due on the 10th of the month. ❾

Traffic Instructions:

Job: ❿ ITP-190 "One Link" ITP Teaser Advertising
Task: BMB Broadcast Media Buy
Media Buyer OK: Bill Pearce
Rep Instructions: PLEASE SIGN AND RETURN ONE COPY: ⓫
Media Rep OK: Ameila Estes

[Cancel] [Save]

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. Broadcast orders have the same numbering sequence as insertion orders.

2 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.

3 **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.

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

printed broadcast order. The **commission** is copied from the vendor, and is used to calculate the buy's net cost.

5 The body of the broadcast order is completely customizable. The standard field labels are designed for broadcast orders, but they can be easily changed. This information appears on the printed broadcast order. **Campaign** and **brand** are optional fields that are used by media analysis reports.

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

6 **Market** and **product** are optional fields that appear on the printed order. 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. An extra user-defined field, labelled here

as **contract number** is optional and is blank by default. Any name can be entered here.

8 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.

9 The **add'l instuctions** and **traffic instructions** provide a space for details. Both fields print on the broadcast order below the line items.

10 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.

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

Broadcast Orders (con't)

tion needed by the station to run the spots, include dates and times a certain ad should run, as well as the program in which the spot appears. In addition, the spot's length, rate, rating points, and the number of times it will run are included. Each broadcast order can contain dozens of different media buys.

1 Click the ☜ (i.e., Add Buys) button or choose Edit > Add Amount/ Media Buy.

The Add Broadcast Media Buys window opens, prompting you to enter the media buy's details. Many different media buys can be entered at once. Tabbing past the total/week field adds the media buy to the order then copies it to the next new media buy. This makes it easy to repeat the same buy several times.

2 Enter the media buy's details, pressing Tab to move between fields.

3 Click Save to add these buys to the broadcast order.

Once saved, each buy will appear as a line item on the broadcast order. Broadcast orders can be pre-billed directly from the Purchase/Insertion Order window or billed using a media billing in Accounts Receivable. You have the option to show each buy's program, date, and time details on the printed media invoice.
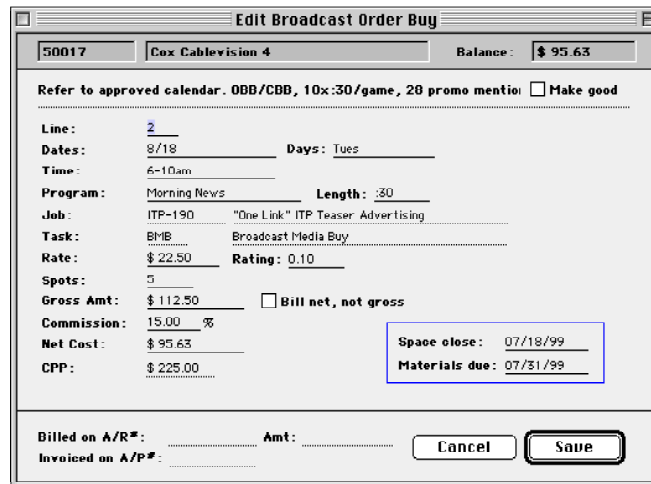
To edit a broadcast order

1 Click the ☜ (i.e., Edit) button or choose Edit > Edit Description.

2 Make any changes, then click Save.

Whenever a broadcast order is changed, you'll be prompted to save it as a revision. Each change you make can increment the revision counter to show how many times an order has been revised. It's optional, but appears on the printed broadcast order for easy tracking. Prior revisions aren't saved. The revision number on an order can also be incremented manually.

To edit a media buy

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.

Media buys on a broadcast order can be edited any time prior to billing. Everything about an order's buys can be changed except for the job number and job task. Changing a buy's amounts will update the PO totals on the job ticket.

1 From the Broadcast Order window, double-click on a media buy.

2 Enter the media buy's changes, then click Save.

Each buy will appear as a line item on the broadcast order.

Broadcast orders can be pre-billed directly from the Purchase/Insertion Order window or billed using a media billing in Accounts Receivable. You have the option to show each buy's program, date, and time details on the printed media invoice.

To print a broadcast order

1 Click the ▣ (i.e., Print Form) button or choose File > Print Purchase Orders then follow the prompts.

To clone a broadcast order

Like purchase orders, broadcast orders can be cloned. Cloning creates an exact line-for-line duplicate on an existing order, which can then be modified and printed. Changing the new broadcast order doesn't affect its original order. To clone a broadcast order, choose Edit > Clone.

To edit a broadcast order's disclaimer

Insertion orders can be pre-billed directly from the Purchase/Insertion Order window. The pre-bill invoice shows the insertion order's publication, issue date, gross cost, and other details. Many insertion orders can be billed on the same invoice by adding a media billing in Accounts Receivable. The media invoice shows each insertion order's publication, issue date, ad/ caption, and other details. For more information, see page 4-17.

The Add Broadcast Media Buys window

Add Broadcast Media Buys								
50017 ❶		Refer to approved calendar. OBB/CBB, 10x:30/game, 28 pro						
COX4		Cox Cablevision 4						
Dates: ❷	**Days:**	**Time:** ❹	**Program:**	**Len:**	**Rate:** ❼	**Rating:**	**Spots:**	**Total/Week:**
8/21	M-F ❸	10-11pm	Evening News ❺	:30 ❻	$ 35.00	0.20	10 ❽	350.00 ❾
8/17	Mon	6-10am	Morning News	:30	$ 22.50	0.01	10	$ 225.00
8/18	Tues	6-10am	Morning News	:30	$ 22.50	0.10	5	$ 112.50
8/19	Wed	6-10am	Morning News	:30	$ 22.50	0.10	5	$ 112.50
8/20	Thurs	12-2pm	Midday News	:30	$ 18.00	0.08	5	$ 90.00
8/20	Thurs	12-2pm	Midday News	:30	$ 18.00	0.08	10	$ 180.00
TOTAL:							35	$ 720.00

Cancel   Save

1 The **order number**, **description**, and **vendor** appear for reference when adding media buys to a broadcast order.

2 The ad's run **dates** indicate the specific date (or range of dates) during which this buy's spots will be broadcast. It is not formatted for dates, so any combination of letters or numbers can be entered.

3 **Days** indicates the specific days of the week during which the spots will run.

4 **Time** shows the specific time (or daypart) during which the spots will be shown.

5 The **program** field describes the specific TV or radio program where the spots are being run.

6 The **length** field indicates the type of spot being ordered (e.g., :15, :30, :60, etc.).

7 The **rate** field is the gross cost per spot, which is used to calculate the media buy's total gross.

8 **Spots** is the quantity of ads that are being ordered for this media buy.

9 Each media buy's **total** gross cost is based on the number of spots x its rate. The buy's total net cost is calculated as the gross x the order's commission, which was entered in the broadcast order was first added.

Make Goods

Make goods are compensation for ads that either never ran or ran incorrectly. There are many different ways an 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 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 are not available in Clients & Profits Classic.

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 descrepancies 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

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.

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

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

3 Click the ❌ (i.e., Add Make Good) or choose Edit > Add Make Good.
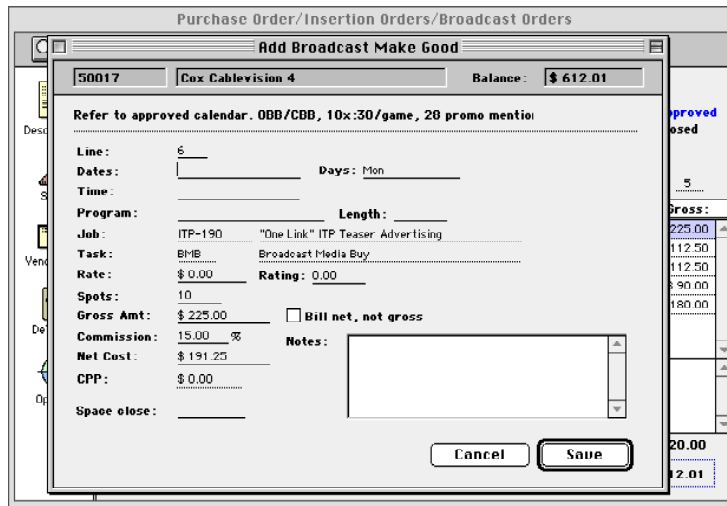
The Add Broadcast Make Good window opens, prompting you to enter the make good's details. The media buy's details are copied to the make good line item except for the date, time, and program.

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 ❌ (i.e., Add Make Good) 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 rate, spots, amounts, and other details 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 Purchase Orders then follow the prompts.

Media 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. For more information about media spending reports, see page 62.

■ Media goals are not available in Clients & Profits Classic.

To enter the shop's media billing goals

Media Billing Goals

Media department billing goals (gross):
These goals are used on the media spending and analysis reports.

Media kind:	1Q:	2Q:	3Q:	4Q:	YTD:
Broadcast	30000	$ 10,000	$ 75,000	$ 30,000	$ 145,000
Cable TV	$ 135,000	$ 25,000	$ 65,000	$ 25,000	$ 250,000
Radio	$ 90,000	$ 60,000	$ 25,000	$ 40,000	$ 215,000
Newspaper	$ 250,000	$ 350,000	$ 80,000	$ 1,250,000	$ 1,930,000
Magazine	$ 450,000	$ 400,000	$ 325,000	$ 504,000	$ 1,679,000
Outdoor	$ 10,000	$ 10,000	$ 10,000	$ 15,000	$ 45,000
Interactive	$ 5,000	$ 10,000	$ 10,000	$ 15,000	$ 40,000
Other	$ 2,500	$ 11,000	$ 25,000	$ 24,000	$ 62,500
TOTAL	$ 972,500	$ 876,000	$ 615,000	$ 1,903,000	$ 4,366,500

Cancel   Save

1 Choose View > Media Plans (Media Estimates).

2 Click the ▣ (i.e., Media Goals) button, or choose Edit > Media Billings Goals.

Use the media billing goals as a planning tool. 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.

The Media Goals window opens, displaying a worksheet with the quarterly billing goals for the eight different kinds of media.

2 Enter the quarterly billing goals for each of the media kinds.

3 Click Save.

These media billing goals can be edited any time. They are used only for media reports, and do not affect job tickets, media plans or estimates, job costing, or the General Ledger.

Importing Orders with the Clients & Profits Media Link

The Clients & Profits Media Link is a stand-alone application that imports broadcast orders, print insertion orders, and vendor invoices from popular media buying systems into your C&P database. It imports media orders and invoices from SmartPlus, Strata, Tapscan, and other media buying systems that support the Standard Media Interface.

There are two versions of the Media Link. Both are exactly alike, except for the version of Clients & Profits with which each works. The C&P Media Link 3.0 works with Clients & Profits Classic 3.x, Clients & Profits Pro 3.x, and Job Tracker 3.x. The C&P Media Link 4.0 works with the newest versions of Clients & Profits Classic 4.x, Clients & Profits Pro 4.x, and Job Tracker 4.x. The Media Link version you use depends on which version of Clients & Profits you're using.

■ The "standard media interface" is a technical specification that defines the interface between media buying systems and accounting systems like Clients & Profits. It is a generic interface designed especially for ad agencies to simplify tranferring data between media buying systems and accounting programs. The SMI specification is used by developers to program export files from media to accounting. You don't need to know anything about the SMI in order to use the C&P Media Link. For more information on the SMI, see *www.clientsandprofits.com/media/ SMI_specs.html*.

Media buying systems that support SMI, such as SmartPlus, export station and publication orders from media plans into specially-formatted text files. A separate text file is created for each broadcast order, insertion order, or vendor invoice. Each text file includes the details of the order (e.g., station ID, run dates, number of spots, rating, cost, etc.) or invoice needed by Clients & Profits for job costing, billing, and media accounting.

Here's how it works: A media buyer enters broadcast orders, insertion orders, and vendor media invoices are entered into SmartPlus, Tapscan, or Strata. The media buying system then saves a copy of the order as a text file on your file server. The C&P Media Link looks for these export files (either one at a time or automatically at different intervals), bringing the data into your Clients & Profits database as broadcast orders. The station orders appear in the Purchase/Insertion Orders window as broadcast orders—just as if you'd typed them in yourself. Once imported, these orders can be billed to clients just like any other broadcast order.

The C&P Media Link application lets you import media buys as they happen, one at a time. Or, automatic importing can be scheduled at various intervals (e.g., every hour, every day, etc.). This option lets you run the C&P Media Link unattended on a spare computer somewhere in the office, importing new buys automatically throughout the day.

The C&P 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. Since the Media Link imports the actual media buy, there's no double-entry and no missing data.

Key features

■ TV and radio media orders are imported directly into your Clients & Profits database as broadcast orders.

■ Print media orders are imported into C&P as insertion orders.

■ Vendor media invoices are imported into C&P as unposted A/P invoices.

■ Media buys can be manually imported, one-by-one, or automatically imported at selected intervals (e.g., every 15 minutes).

■ The Media Link is designed to handle high-volume media departments. It can effectively import hundreds of media buys each day.

■ It can be run on either a Macintosh or Windows-based computer.

■ The Media Link validates each media buy for a valid client and vendor. A user-defined option lets the Media Link add a new client or vendor automatically, or not import the media buy.

■ Imported media buys can be billed, or even pre-billed, just like other media orders you've entered manually.

■ A detailed log keeps track of every imported media order, indicating which ones had errors.

■ Imported media buys appear on PO reports, job reports, and WIP reports—anywhere media orders are normally found.

■ An e-mail notification can be automatically sent each time a new media order is imported.

How the Media Link works

The media department starts the process by adding media plans into their media buying system (e.g., Tapscan, SmartPlus, Strata, etc.). When the buyer finalizes the plan and places the order, the media buying system exports the order and its buys into a specially-formatted text file—one for each order. This file is saved into a special folder (named "media_ buys") on the file server.

The export file contains the details of the media order, including station/publication, run/issue dates, number of spots, cost, and more (they're slightly different for broadcast and print orders). These files are held in the media_buys folder on the file server until they are imported by the Media Link.

The C&P Media Link opens these text files, determines whether the file contains a broadcast order, print insertion order, or vendor invoice then saves the data into the Clients & Profits—just as if it were entered personally. The export file is then moved automatically to the *imported_buys* folder for storage just in case it there's an error and it needs to be imported again.

To use the Media Link, you'll first need to configure the media buying system to save its export files into the C&P folder on your file server (you'll probably need help from the media system's helpdesk with this.) There's nothing on the server to configure; since both Macs and Windows-based PCs can usually access the same file server, any kind of computer can be used for the Media Link.

You'll also find more information about the C&P Media Link and the Standard Media Interface here: **www.clientsandprofits.com/media/media_link.html**
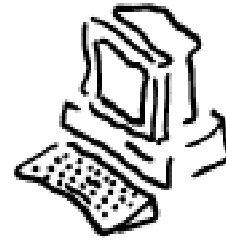
Media Buyer

The media buying system saves SMI-based export files to the "drop" folder called *media_buys*

Accounting Department

The C&P Media Link looks for new broadcast order, insertion order, or vendor invoice export files in the "drop" folder, imports them, then stores them into the *import_buys* folder

Broadcast order export files end with **.TBY** (or .BUY). Insertion order export files end with **.PBY**. Vendor invoices end with **.VAP**

Accounting	
12 items, 2.5 GB available	
Name	**Date Modified**
C&P_98.DFI	Thu, Jul 9, 1998, 9:56 PM
▽ media_buys	Today, 9:34 AM
10023.BUY	Tue, Jun 9, 1998, 10:43 AM
10024.BUY	Tue, Jun 9, 1998, 10:43 AM
10025.BUY	Tue, Jun 9, 1998, 10:43 AM
▽ imported_buys	Today, 9:34 AM
10017.BUY	Tue, Jun 9, 1998, 10:43 AM
10018.BUY	Tue, Jun 9, 1998, 10:43 AM
10019.BUY	Tue, Jun 9, 1998, 10:43 AM
10020.BUY	Tue, Jun 9, 1998, 10:43 AM
10021.BUY	Tue, Jun 9, 1998, 10:43 AM
10022.BUY	Tue, Jun 9, 1998, 10:43 AM

Media export files are named with the broadcast/insertion order's number, so each text file will have a unique name. Orders than span several months are exported as separate text files, one for each month; in these cases the month is added to the order number.

The "drop" folder, called media_buys, is created automatically the first time the C&P Media Link is opened. It is added the same folder/directory that keeps the C&P database.

The media buying system needs to be configured to save new media export files into this drop folder.
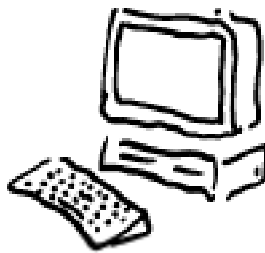
File Server

The file server doesn't do anything except store the newly-created media export files and the imported export files.

Importing Media Buys

Media orders and invoices can be imported individually or imported automatically at user-defined intervals (e.g., once a day, every hour, every five minutes, etc.). If the media buyers place fewer than 10 orders a day, they can be easily imported one-by-one. If your agency is heavily involved in media buying and places many orders each day, the automatic importing is much more practical. In this case, a spare Mac or PC needs to be set up on the network just for the Media Link. When enabled, the C&P Media Link will automatically look for any new (or revised) media buys then import them into Clients & Profits.

It's important to verify that imported media buys were imported accurately. A routine needs to be established between the media and accounting departments to double-check the day's media orders. When a station order is made by a media buyer, they should print a duplicate copy for the accounting department. When the media order is imported by the C&P Media Link, the accounting department should compare the printed media order to the imported order in Purchase/Insertion Orders. If the order number, number of media buy lines, total rating, total spots, and net and gross amounts match then the order was imported correctly.

■ Importing media orders and invoices is a one-way process. Since the media buying system takes priority over Clients & Profits for media ordering, all changes and revisions to a media order **must** be made in the media buying system. Changing an imported media buy in Purchase Orders **will not** update the media buying system—and will cause billing and cost accounting problems.

■ The order number is assigned by the media buying system, not the C&P Media Link. It has to be unique, or else the order will be handled as a revision. When a revised media order is imported, it completely replaces the original broadcast or insertion order. The same media can be revised and reimported any number of times.

How the C&P Media Link handles vendor invoices

If you use your media buying system to reconcile media orders with vendor invoices, those invoices can be automatically imported into your C&P database using the Media Link.

The Media Links imports vendor media invoices into the Accounts Payable data file, where they appear as unposted invoices. Imported invoices contain the media order number and other details necessary for reconciliation, so there's nothing more to enter. Vendor invoices are imported as job costs (or as media accruals; see below), picking up the job and task from the broadcast or insertion order.

■ In C&P Pro, imported vendor invoices will be handled as a media accruals if that option is enabled.

1. Click the Import button, then find and open the "media_buys" folder

Your media buying system will save export files for each order or invoice in the media_buys "drop" folder on your file server. It should be inside the same folder that contains your Clients & Profits database on your file server.

Once you've found and opened the media_buys folder, you'll see a list of newly-exported media text files that are ready for importing. (Once the text file is imported, it will be moved into the the "imported_buys" folder as a backup.).

■ Only one media order or invoice can be imported at one time. To import many buys at once, you'll need to use the "automatic import" feature (see the next page).

Awaiting import. The *media_buys* folder stores newly-exported text files from your media buying system. The C&P Media Link can automatically look inside it for new text file, importing what it finds into your Clients & Profits database. The file's extension (which may not appear if your PC is set to hide them) identifies whether the text file is a broadcast order (i.e., .TBY), a print insertion order (e.g., PBY), or a vendor media invoice (e.g., .VAP). Once an export file is imported, the Media Links moves it in the *imported_buys* folder.
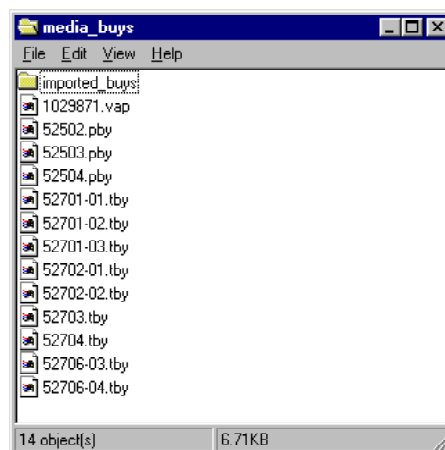
2. Select the media text file you wish to import.

Any text file in the "media_buys" folder can be selected. (The order in which files are imported isn't imported.) The Media Link then checks the text file's extension (either .TBY, .PBY, or .VAP) which determines whether the text file is a broadcast order (i.e., .TBY), a print insertion order (i.e., .PBY), or a vendor invoice (i.e., .VAP). This extension determines how the text file will be handled.

■ Media text files can only be imported from the media_buys folder. If you try selecting a media text file from another location, you'll get an error.

As the media buy is processed, the C&P Media Link shows you how many buy lines are being imported. When the media buy is completely imported, a log entry is created, the text file is moved into the "media_buys" folder, and an OK message appears telling you that the order was imported success-fully. (If enabled, a log entry is saved automatically.)

This step can be repeated now for any remaining new media buys. Once all of the media buys are imported, it's a good idea to check them in Clients & Profits.

3. Check the imported media order in Clients & Profits.

Imported media buys are saved as broadcast or insertion orders in the Purchase Orders data file (vendor invoices are saved as unposted A/P payables). They appear just as if you'd entered them yourself from the printed media order. Once imported, they can be billed like any other media order.

You can easily check the imported buys by comparing them to the orders printed from the media buying systems. To see the imported order in Clients & Profits:

1 Choose File > Open Clients & Profits.

2 Double-click on your Clients & Profits application when prompted.

3 Enter your initials and password into the Introduce Yourself window, then click OK.

4 Choose Accounting > Purchase Orders.

If the imported media was the last-added order, it will appear automatically. If not, click the Previous button until it displays.

Every line of the printed order should appear on the imported order. Be sure to check that client, vendor, job, and task, as well as the total number of spots and the total cost are identical. If not, delete the imported order, re-export the media order from the buying system, then import it again using the Media Link.

Later, the media vendor's invoice will be reconciled with the media order in Accounts Payable. By adding the media invoices, Clients & Profits will track how many spots actually ran for each buy line.

To start the automatic import

1 Click the ▨ (i.e., Start) button, or choose Media Link > Start Automatic Import.

The **current status** field will change to "waiting for the next scheduled import." This means the Media Link is ready for the next automatic import. The **import interval** indicates how often the Media Link will check for new media buys; it can be changed in Preferences to happen more frequently or less often.

Once the automatic import has started, it will run unattended until it is stopped.

■ To prevent the Media Link from interfering with the nightly backup, it will automatically quit at 10 PM.

■ If the Media Link is set to always automatically import in Preferences, any new media files will be imported immediately whenever the Media Link application is started.

To stop the automatic import

1 Click the ▨ (i.e., Stop) button, or choose Media Link > Stop Automatic Import.

Any new media buys exported by the buying system will sit in the C&P folder until the automatic import is started again.

The automatic importing can be started and stopped any number of times without affecting the database.

■ Choosing Media Link > Stop Automatic Import is temporary—it doesn't disable the "always import" option in Preferences. The next time the Media Link application is started, it will automatically import media files at the specified interval.

Printing Media Reports

Clients & Profits Pro prints five kinds of media reports: status, traffic, post-buy, client spending, and group performance. **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. **Post-buy reports** are used by media buyers to see in detail the media buys that were ordered on broadcast and insertion orders. Post-buy reports can subtotal media buys by client or station/publication. **Client spending reports** are used by account service to show clients how and where their advertising budget has been spent. Finally, the agency's management can use **group performance reports** to analyze how well the media department is managing themselves.

Vendors and media reports

Many client spending and group performance reports compare media buys by the different kinds of media, including broadcast TV, cable TV, radio, newspaper, magazine, interactive, outdoor, and a miscellaneous kind labeled "other." For these reports to sort media buys correctly, it's important that each media vendor is accurately categorized by the kind of media they offer. This "media kind" setting is entered for each vendor in the Vendor Info window. Media buys for vendors without a media kind setting will be included in the "other" totals.
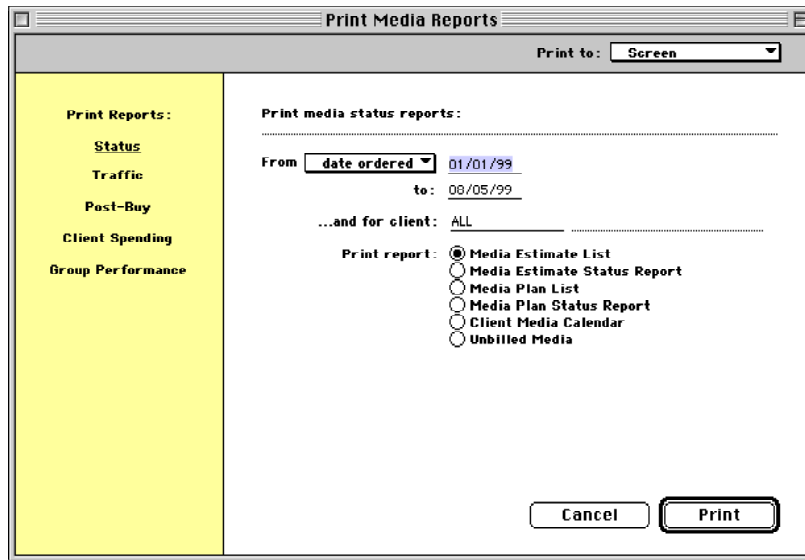
Media goals and media reports

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. For more information about media goals, see page 55.

To print media reports

1 Chose Accounting > Media Plans (Media Estimates).

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.

2 Click the (i.e., Print Reports) button or choose File > Print Media Reports.

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

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

4 Choose a report by clicking on a report name.

5 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. Post-buy, client spending, and group performance reports are based on media buys from broadcast orders and insertion orders. These reports will select media buys from the broadcast or insertion order's order date.

6 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

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.
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 report lists the selected space closing dates of media estimate buys, sorted by media buyer and date.
Material Due	The Materials Due report lists the selected material due dates of media estimate buys, sorted by media buyer and date.
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.
Post-Buy Reports	
Media Recap	The Media Recap lists buys for a selected date range and sorts them by client or pub/station and month. The report is based on insertion and broadcast orders. Included is the issue/flight date, publication/station, ad size/program, ad name, net amount, order number, and the A/R invoice number the IO or BO is billed on. It can be printed by client or pub/station.
Discrepancy	The Discprepancy report lists any insertion or broadcast order discrepancies between the gross and net amounts ordered vs. the actual gross and net amounts invoiced by the publication or station. The report includes each buy's A/P number and A/P date. It can be printed by client or pub/station.
Reconciliation	The Reconciliation report compares an insertion order or broadcast order's gross and net amounts ordered vs. the actual gross and net amounts invoiced by the publication or station. It includes the A/R invoice number the IO or BO was billed on and whether a client payment is posted, and the A/P invoice number the IO or BO was applied to and whether a vendor payment is posted. It can be printed by client or pub/station.
Client Spending Reports	
Mix Analysis	The Mix Analysis report compares total spending with quarterly totals for each kind of media for all clients and all stations/publications.
Market Analysis (TV/Radio)	The Market Analysis report compares TV/radio spending by quarter for each market (which is optionally entered on each broadcast order or insertion order)
Product Analysis (TV/Radio)	The Product Analysis report compares TV/radio spending by quarter for each product, using the user-defined "product" field on broadcast and insertion orders.

Client Spending Reports (con't)

Station/Publication Analysis The Station/Publication Analysis report summarizes media spending by client by quarter for each station or publication.

Division Analysis The Division Analysis report summarizes media spending for each division and its clients. It helps account service track the total spending for corporate clients that have many business units or groups.

Monthly Media Analysis The Monthly Media Analysis report summarizes total media spending for each month of the calendar year for each station/publication. This report helps media buyers and account supervisors analyze which stations and publications are getting the most media dollars from the agency.

Group Performance Reports (con't)

Trend Analysis The Trend Analysis report compares quarterly media spending vs. the media department's spending goals. It shows how the shop's media spending is changing from the beginning of the year.

Client Profitability The Client Profitability analyzes media billings, cost, gross profit, and average commission for each client's media spending. The report is based on the gross and net amounts from the client's broadcast orders and insertion orders.

Commissions Analysis The Commission Analysis report analyzes commissions generated by each different type of media (e.g., broadcast TV, radio, newspaper, etc.) for each client. It calculates the commission based on the order's total gross and total net. NOTE: The commission is not calculated on the actual net cost from the vendor's A/P invoice or the gross amounts from the client's A/R media invoice.

Buyer Analysis The Buyer Analysis report summarizes each media buyer's billings, costs, and commissions for each client. The year's totals are compared to last year's to highlight any improvements (or decreases). The report also calculates the average commission for each media buyer. NOTE: These totals are based on broadcast orders and insertion orders, and not calculated on the actual billings from A/R or actual costs from A/P. This report can be useful to agency management to help measure the performance of each media buyer.

Media Vendor Volume Analysis The Media Vendor Volume Analysis report summarizes gross and net totals, as well as calculating the average commission, for each different kind of media. Totals are shown for each station or publication for broadcast TV, radio, cable TV, interactive, etc. The report calculates the percentage increase/decrease in billings for each station/publication.

Clients & Profits - Media Feature Comparison

Feature	Clients & Profits Classic 4.0	Clients & Profits Pro 4.0	Clients & Profits SQL 1.0	C&P Job Tracker 4.0
Imports media orders from SmartPlus, Strata, TAPSCAN, etc.	■	■	■	■
Media calendar w/e-mail reminders		■	■	■
Publications/Ad Sizes table for lookups on plans, estimates, and orders	■	■	■	■
Stations/publicatios table for lookups on plans, estimates, and orders		■	■	■
Broadcast (i.e., TV/Cable/Radio) ordering	■	■	■	■
Broadcast (i.e., TV/Cable/Radio) media planning		■	■	■
Broadcast worksheets		■	■	■
Print (i.e., Newspaper/Magazine/Interactive/Outdoor) ordering	■	■	■	■
Print (i.e., Newspaper/Magazine/Interactive/Outdoor) planning		■	■	■
Media estimating w/automatic ordering	■	■	■	■
Media goal planning and tracking		■	■	■
Media traffic	■	■	■	■
Media reconciliation (i.e., order matching with vendor media invoices)	■	■	■	■
Make goods for insertion orders, broadcast orders		■	■	
Automatic WIP accrual entries for media costs and billings		■	■	
Media billing (including pre-billing)	■	■	■	
Option to bill net amounts instead of gross amounts	■	■	■	
Option to bill commission only	■	■	■	