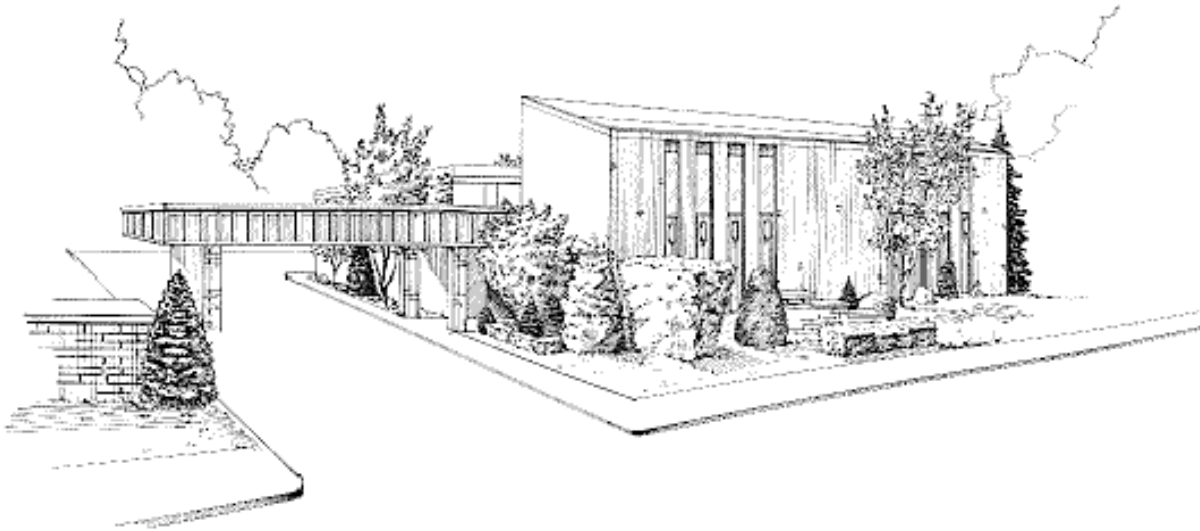# Vision Total Advertising Frequently Asked Questions

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We are constantly adding/updating this FAQ. If your question is not answered in this document, contact the Total Advertising Department at (518) 434-2193. Any comments or suggestions on this document are appreciated.

THE BASICS

What do all the icons on the toolbar mean?

SYSTEM TOOL BAR

Icon	Shortcut	Description
	F1	Previous Form/Dismiss Form. AKA the "seatbelt", one of the most useful shortcut icons in the system. If a list of choices is zoomed into, highlighting the chosen data in the Zoom window and hitting this icon closes the Zoom window and moves the highlighted data into the previous window. See "What is a Zoom?" below.
	SHIFT F1	Cancel Form
		Next Form (not used in Total Ad)
	F9	Zoom
	F6	Find - after entering search criteria, this will find matching records
	SHIFT F6	Clear to Find - this must be used prior to entering search criteria
	F7	Add or Update Record
		Delete Record
	SHIFT F7	Clear to Add - used when creating a new record
	SHIFT F3	Recall Field Value
	F3	Clear Field
	SHIFT F5	First Record - this will move to the first record
	SHIFT F4	Previous Set of Records - this will move to the previous set of records
	PG↑	Previous Record - this will move to the previous record
	PG↓	Next Record - this will move to the next record
	F4	Next Set of Records - this will move to the next set of records
	F5	Last Record - this will move to the last record

Other Keys:

↑	Previous Field	→	Next Character
ENTER	Return/ Next Field	TAB	Next Tab
←	Previous Character	SHIFT TAB	Previous Tab

What do the buttons on the reports and listings pages mean?

| **X** | **✎** | **DEVICE** | **TERMINAL** | **UPDATE SET** | **CREATE SET** | **SYSTEM SET** | **VIEW SETS** | **Sample** |

Button	**Description**
DEVICE	Opens a window in which you can choose a printer from a drop-down list and click the Queue Report button to send report to that printer, or...
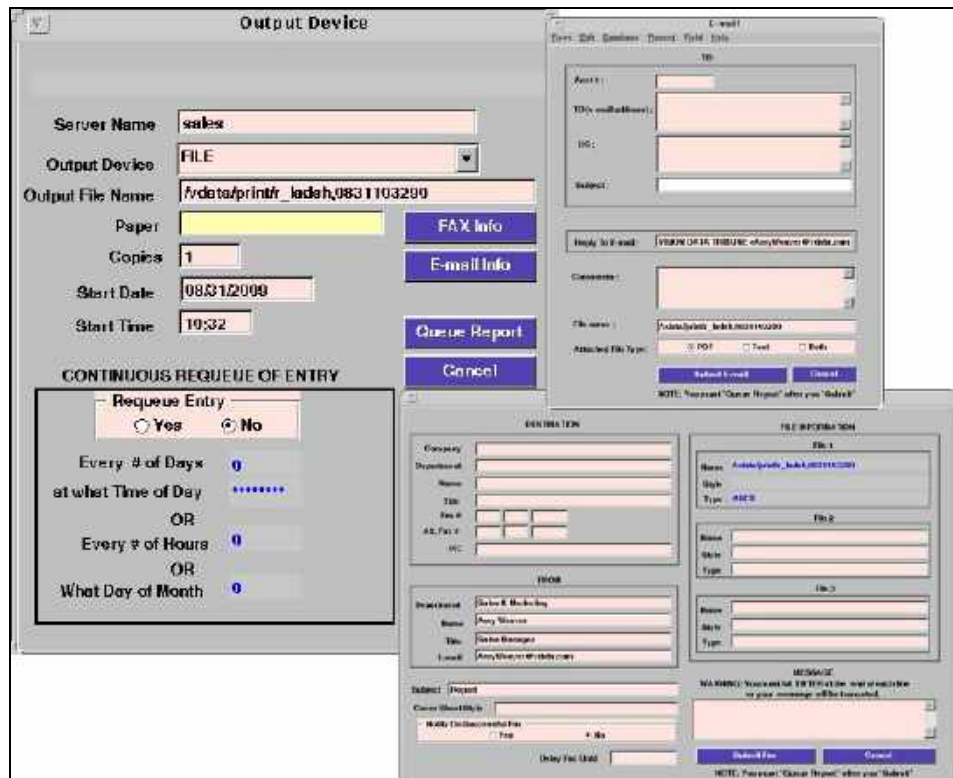
The "FAX info" button opens a window in which fax information can be typed. If the customer has a fax number in their file, the number will automatically be filled in. The user's information will automatically be filled in in the FROM section. Click Submit Fax and when that window closes, click Queue Report, or...

The "E-mail info" button opens a window in which an email address can be typed. If the user or account master (depending on the type of report) has an e-mail address saved then simply clicking in the To (email address) field automatically prefills that field with the email address. Any other email addresses can be manually typed. Multiple email addresses should be separated by a comma. Click Submit Email and when that window closes, click Queue Report.

The Continuous Requeue of Entry section provides the ability to have this exact report with date parameters, etc. automatically rerun at user-defined intervals and e-mailed or faxed again. For example, if you wanted to run a Projected Revenue report for the whole month and see the latest information everyday via email, you could choose the dates of 1st thru 31st of a given month and set it to requeue every 24 hrs. Every day it would provide the report with updated information for those dates.

TERMINAL	Sends the chosen report to display on your workstation. This is the only option which locks the screen until the report is processed and displayed. All other options process in the background on the server and immediately free the workstation.
UPDATE SET	If an answer set was chosen and changes were made, clicking this button will save the changes to the answer set. The next time you choose this answer set these changes will be included.
CREATE SET	After choosing specific options on the screen, clicking Create Set will store the choices as a new answer set, enabling you to use them again. A "View Sets" (see below) will automatically execute so that you can give this set a meaningful name.
SYSTEM SET	These are the "factory default" options for the report. Clicking this button will restore all report options to these original settings.
VIEW SETS	Lists all saved sets. It is from here that a set is chosen to pre-fill in the report screen. You can select one for use with the 'Seatbelt/Dismiss Form' (). You can rename a set and click on 'Add or Update' (). You can also designate any one set as "Default"; if another set is so designated, that designation will be removed.
Sample	If a report has been "Saved as Sample" in the Display Report screen, this will display that sample.
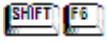
Button	Description
DISMISS	Closes the report screen.
SELECT FILE from Print Directory	Opens a file chooser to browse the print directory and select a file to display, save as a sample, or print.
LOAD FILE	Displays the selected file as text.
DISPLAY PDF	Displays the selected file as PDF using Adobe Reader.
Save as Sample	Saves the selected file as the Sample Report above.
QUEUE REPORT	Prints the selected file on the indicated printer.

What additional Function Keys are available in ad entry?

Function Key	Action
F2	Layout
SHIFT F2	Account Status
CTRL F2	Call Backs
CTRL F3	Not Used
CTRL F5	Hold Ad
CTRL F7	Not Used
F8	Ad Search
SHIFT F8	Not Used
CTRL F8	Ad Stats
F10	Print
SHIFT F10	Fax
CTRL F10	Email
F11	Insert Order
SHIFT F11	Copy/Renew
CTRL F11	Not Used
F12	Not Used
SHIFT F12	Account
CTRL F12	Contract

How do I enter search criteria?

1. Click on 'Clear to Find' () or press .

2. Enter enough search criteria to identify the record or records you are looking for.

3. Click on 'Find' () or press .
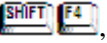
Do not enter too many criteria, because records must match all of them to be found. For example, if you know the account number of an account you wish to look up, enter only that. If you enter additional criteria and the account does not match them, it will not be found.

Instead of entering exact match values, you can use any or all of the following. Screen fields will scroll horizontally while in find mode to accommodate whatever you wish to enter.
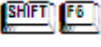
• Null (empty) values are represented by @.

• Ranges, consisting of two values with a hyphen (-) between them. Examples: numbers 100-199, or names between SMA-SME. Open ranges can be specified with < or >, e.g. >0.

• (For strings only) Wild cards.
  * stands for any or no characters;
  ? stands for any one character;
  [] enclose a list or range of characters.
  ! stands for negation, that is, find only records that do NOT match the following pattern.

To use any of the special characters in this section literally in string searches, enclose them in []. Examples:

  • SMITH* for any string beginning with SMITH
  • !SMITH* for any string NOT beginning with SMITH
  • SMITH?ON if you're not sure whether it's SMITHSON or SMITHTON or something similar
  • SMITH[ST]ON if you're certain it's one of those two
  • SMITH[-]JONES to take the hyphen literally rather than as a range specifier.

• Lists, consisting of any number of values, ranges, or wildcards separated by commas. Example: numbers 115,120-129,150 or names SMALL,SMEL?,SNELL*.

When you have entered all the search criteria, click on 'Find' () or press . All records found will come up in a stack. You can move through the stack (note the indicator "Record xx of yy") using Page Down and Page Up on your keyboard, or with the appropriate toolbar buttons at the top of the screen (or , or , , , or , and or).
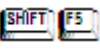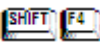
How do I search for deleted records?

1. You can search for deleted records using the audit module, which now tracks changes and deletes to most records in the system. It's active anywhere the login stamp has the color of a "zoom", meaning a double-click there will take you into the audit tracking screen and show changes to the current record.

2. If there is no current record, as when you are in find mode or after a clear to add, if you know the key of the deleted record you can enter that in the first key field of the Audit Trail form and then click on 'Find' (⬚) or press ⬚.

3. If there is a current record, first click on 'Clear to Find' (⬚ or press ⬚⬚), enter the key you're looking for, and then click on 'Find' (⬚) or press ⬚.

4. It's a good idea to also enter the table name to search, if it hasn't been prefilled - but not essential. If you don't and there happen to be records with the same key in a different table, you'll see those also. The table name for ads is arad, and there are also related tables that start with arad_* where * stands for the rest of the child table name.

What is a "Record Key"?

The record key is, e.g. the code for code tables, the account number for accounts, the ad number for ads, etc. - whatever field uniquely identifies the record to the system.

If, for example, a user calls and says "What ever happened to ad 123456? I can't find it any more". The answer is to look for a record with this key in the audit table. It was probably deleted from the live ad table.

It's possible that there's also a completely unrelated account, transaction, payment, etc. with this same number. A search on key will find all such records that have audit trails for changes or deletes, but if there are such duplicates it should be obvious from the content which is which, and the user can use the Next/Previous Record buttons (⬚ or ⬚⬚, ⬚ or ⬚⬚, ⬚, ⬚, ⬚ or ⬚, and ⬚ or ⬚) to search for the correct one.

How are changes to data records tracked?

Vision Total Advertising now includes an "audit module" which logs changes and deletes of data records in most tables, in a special "audit table". This audit table can be accessed from any data entry form where the user login stamp has the color of a Zoom field.

Normally, double-clicking on this field will bring up the audit table and show a complete history of changes to the current record in reverse chronological order (most recent first). In many cases a single change record will show more fields than fit in the space allowed. Use the field scrollbar, or double click to show the field by itself on a larger screen.

You can also search manually in the audit form for a record whose key you know. For example, if you know a certain record key used to exist and is no longer there, there should be a record of its deletion in the audit table.

If the calling form is in find mode, the audit table will also come up in find mode so that a manual search can be done.

Audit records are generally kept for one year. This can be changed on a site-wide basis by authorized personnel.

What is a Zoom?

A Zoom is a convenient way of looking up a value such as an account number, or a rate, class or other code, when needed for data entry. Fields that allow Zoom usually have a special color which distinguishes them from ordinary fields which require direct data entry. Double click on the field to use this feature.

A form will come up showing the available choices in the table. For account numbers, the form will come up in find mode and you will need to enter search criteria (see "How do I enter search criteria?"). For most code tables, the find will be automatic and you will immediately be able to select one of the records.

Navigate to the record you wish to select and press Seatbelt/Dismiss Form () or press . The key value of this record will be entered automatically into the field you zoomed from, as if you had typed it yourself.

If you do not want to return a value to the entry field, use Cancel Form () or press instead of Seatbelt/Dismiss Form.

What are "Servers" in Total Ad?

Total Ad "servers" are processes that run on the system, usually on the main console, to handle user requests for reports to be printed, faxed, or emailed, as well as for various types of batch jobs. There are certain general categories of "servers"; within each category each server runs the same programs and has the exact same capabilities.

What are the server categories?

1. **General batch and report server** (described in more detail below). Usually we configure nine of these to run on the console, although there may be more or fewer depending on the needs of each site. Also, users can be configured to have personal servers run on their own desktops while logged in.

2. **Local ad server**. This handles certain internal processing of ads after an operator finishes with them. It calculates anticipated billing amounts for reports, and passes information to ad tracking software if installed. There is only one of these, and it runs on the console.

3. **Web ad server**. This handles ads placed via the web, converting them into ordinary ads, either on a tentative basis so that web users can see a preview and pricing information, or on a final basis once they submit an ad for publication. Normally there are four of these; if web activity is heavy we may configure a multiple of four, since tentative requests typically will show four options with different features.

4. **Web report server** (under development). This processes requests for reports over the web.

How do I use the batch and report servers to run jobs?

Each server is given its own unique name, to make it easier for users to organize their jobs. The nine (default number) console servers are normally named as below, although the names only provide a way for users to manage their work flow. There is absolutely nothing sacred about our naming scheme of "system", "acct1", "acct2", etc.; we've already used a different approach at other sites based on location, and could switch to a completely different scheme with no practical effect on operation. The batch and report servers function identically. There is no difference in priority among any of them. All have the exact same capabilities, as do users' personal servers which normally have the same name as their user names. That user can then use that private queue for their batches and watch them on the screen and also use, say, "acct1" for other reports.

- acct1
- acct2
- ads1

- ads2
- class1
- class2

- sales1
- sales2
- system

Each server checks the database every 30 seconds to see if there is a job assigned either to it specifically, or to "ANY" server, ready to be processed. When a job is finished it checks immediately to see if there are any more; if not it goes back into the 30 second wait mode.

We try and set server queues so they share the load. It's first in/first out. Since each server queue can only do one process at a time, to avoid performance bottlenecks that affect all users on the system, it's important not to bog it down with too many batch or report processes running at the same time. That's why we prefer users to ask for a specific server rather than "ANY." In fact, they should use a single one consistently by having a default set in their user records. That way, if the user submits 5 jobs they'll run one after the other instead of all at once.

If different users use different servers, then by the laws of chance bottlenecks will be rare. It's not a problem for two servers to process jobs at once, or even three or four, depending on the system hardware. After that things can deteriorate.

If a user has a long job and several short ones, they can put the long job on a server reserved for that purpose by mutual agreement among users at the site. Then put the short ones on their default server.

How do I monitor and manage jobs on the servers?

Use the Queues menu of the Total Ad application.

Total Ad queues are based on department.

• Acct - Accounting running billing, agings, month end, post ads to billing
• Ad Takers - running ad edit lists
• Sales - Salespeople running sales reports
• Systems - Batch process - Dumps to pagination, OPI lists etc.

Each department then manages their own reports and waits only for their own. For example, a sales manager running various future sales reports isn't holding up accounting's ability to get bills and month ends done.

Queue Management is a screen that allows you to view existing jobs (already sent), see in what order they will run, delete them, or assign them to a different queue to get them output faster. It is also essential to be able to get in here to delete jobs that have "continuous re-queue" once the job is no longer needed.

• **Ad Queue** – to monitor the Ad Server described above. All other selections on this menu refer to the Batch and Report Servers.

• **Batch Queue** – to monitor and manage batch jobs.

• **Report Queue** – to monitor and manage reports. Check whenever curious, or to investigate a problem such as why a certain report isn't coming out. Possible reasons for delay, and suggested solutions, include:

    • The job is in process and taking a long time, or is hung. Getting rid of it requires two steps:

        • (1) deleting it from the queue, AND

        • (2) killing and restarting the server.

        If the server is restarted without deleting the job, it will reprocess. If users try to delete an in-process job the program displays a warning explaining the issue.

    • The requested server is tied up with another job. Note that if looking at the batch queue, the problem job may be a report, or vice versa. Some systems show the batch queue in two separate menu selections, "Ad Pagination Queue" and "Accounting Queue". Both must be checked, although they are the same queue.

• **Monitor a Queue** – to watch a specific server and observe its current processing status. Servers output messages, at a minimum when they start and finish jobs. Some batch jobs also show status messages, for example, what phase the post or month end is on. Specify a server name and this will display the latest message from that server, updating every 5 seconds by default. (This can be switched off if the user wants more time to read a message.)

• **Restart a Queue** – to kill and restart a specific server if it appears to be hung or not running. This can be invoked by a user with general add and update privilege in programs, probably someone in the MGR access group. It actually kills the server specified, and then starts all servers not currently running. If all servers are down for some reason, this can be used to start all of them.

How do I stop a print job?

If the job is printing using the system spool facilities (which most jobs are):

1. Select "Run the Queue Manager" in the white window behind the Vision Data Total Advertising menu.

2. Choose "Cancel Active" job option and enter your print queue name.

If that does not work, try turning the printer off, and then on again.

If it is still printing, call Vision Data and ask for Systems support.

How do I schedule reports to print on a certain schedule?
Reports > _____ Reports > _____ Report

Select the report you wish to print on a continuing basis and answer all of the questions or select your saved set. Select Device (DEVICE)on the toolbar and fill in the top portion of the screen for Server Name, Output Device and File Name, Start Date and Time. Select 'Yes' under CONTINUOUS REQUEUE OF ENTRY. Choose when you want this report to process (Every # of days, Every # of Hours, What Day of Month). This selection is for when the report will be produced and how often.

Example 1: You'd like to run the Aging Report once a week and have it emailed to yourself.
1. Enter Start Date as the first Friday.
2. Enter Start Time as the time you'd like the report to begin processing. If you'd like the report in your inbox by 8:00 AM, take into consideration the average processing time of the report and enter the time accordingly (7:00).
3. Under CONTINUOUS REQUEUE OF ENTRY, select 'Yes.'
4. Enter 'Every # of Days' as 7.
5. Enter 'at what Time of Day' as the time you'd like to begin processing the report.

ADVANCE PERIOD/DATES (New Feature): On some reports there are parameters that have been selected on the report for Period or Range of Dates. You need to determine how to advance these date and period parameters. In the Aging Report there are no date parameters, but there is a Period that must be selected. You should almost always want your aging for the Current Period, so if the current period changes at month end, you want your Aging to also roll into the current period. Enter Advance Report Period? as 'C - Always Current Period' to always use the Current Period when running this report. NOTE: You should only be choosing How many days to advance OR Advance Report Period, NEVER both choices.

Example 2: You'd like to run an Ad Edit Listing each evening for the next days publication, and you want to advance the Range of Dates every day.
1. Enter Start Date as the first day.
2. Enter Start Time as the time you'd like the report to begin processing (19:00).
3. Under CONTINUOUS REQUEUE OF ENTRY, select 'Yes.'
4. Enter 'Every # of Days' as 1.
5. Enter 'at what Time of Day' as the time you'd like to begin processing the report (19:00).
6. Under ADVANCE PERIOD/DATES, How many days to avance?, enter 1.
7. For 'On what date to start advancing?' enter tomorrow's date. Today's report will have the dates selected; tomorrow when it runs the dates will have advanced 1 day.

DAILY MENU > ADVERTISERS

How do I find an existing account?
Daily > Advertisers > Advertiser Maintenance

See "How do I enter search criteria?" under THE BASICS.

How do I edit information in an existing account?
Daily > Advertisers > Advertiser Maintenance

1. Click on 'Clear to Find' () or press .

2. Locate the record to be edited (see above) and edit the appropriate fields.

3. Click on 'Add' () or press .

How do I add a new account?
Daily > Advertisers > Advertiser Maintenance

1. Click on 'Clear to Add' () or press .

2. Complete all applicable fields on this form.

3. Click on 'Add' () or press .

How do I delete an account?
Daily > Advertisers > Advertiser Maintenance

If there is existing history, ads or balances on the account you will be unable to delete the account.

1. Click on 'Clear to Find' () or press .

2. Locate the record to be deleted and click on 'Delete' ().

3. You will be prompted with "Are you sure you want to delete this record?." If sure, click on 'yes'.

How do I charge Sales Tax for specific items such as commercial printing?
Daily > Advertisers > Advertiser Maintenance

1. Set the appropriate rate codes as taxable by choosing 'yes' under 'Taxable' on the rate maintenance screen (Tables > Rate Codes & Rate Amounts).

2. Set the customers sales tax code on the master file under Sales Tax Information (Daily > Advertisers > Advertiser Maintenance). Sales tax codes can be created in Tables > Sales Tax Codes and Percents.

3. When ads are entered in ad entry they automatically calculate the tax based on the rate code and customer tax code.

DAILY MENU > CONTRACTS

How do I find an existing contract?
Daily > Contracts > Contract Maintenance

See "How do I enter search criteria?" under THE BASICS. If you don't know the account number, use Zoom to look it up (See "What is a Zoom?" under THE BASICS.)

How do I edit information in an existing contract?
Daily > Contracts > Contract Maintenance

1. Click on 'Clear to Find' () or press SHIFT F6.

2. Locate the record to be edited and edit the appropriate fields.

3. Click on 'Add' () or press F7.

How do I renew an existing contract?
Daily > Contracts > Contract Maintenance

1. Click on 'Clear to Find' () or press SHIFT F6.

2. Locate the record to be renewed.

3. Click on 'Renew Contract'.

When you renew a contract, everything stays the same except for the start and end dates. The contract number remains the same; users can override anything on the screen except the contract number.

How do I add a new contract?
Daily > Contracts > Contract Maintenance

1. Click on 'Clear to Add' () or press SHIFT F7.

2. Complete all applicable fields on this form.

3. Click on 'Add' () or press F7.

How do I delete a contract?
Daily > Contracts > Contract Maintenance

For brand new contracts which have never been used:

1. Click on 'Clear to Find' () or press .

2. Locate the record to be deleted and click on 'Delete' ().

3. will be prompted with "Are you sure you want to delete this record?." If sure, click on 'yes'.

If ads have been taken on a contract:
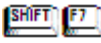
• If the profit center does not Allow Expired Contracts, simply change the end date on the contract to a past date.

• If the the profit center does Allow Expired Contracts, meaning that even after a contract expires the advertiser still gets the contract price, then it is necessary to change the contract size and insert levels to 0 which will force the open rate pricing. This is better than deleting the contract because then previous fulfillment of the contract is still available. The reason for allowing expired contracts is in case salespeople do not get contracts renewed in time but still wish to honor contract prices during that time.

DAILY MENU > SALESPEOPLE

How do I enter a new salesperson?
Daily > Salespeople > Salesperson Maintenance

Salesperson Maintenance provides the ability to track and report all sales activity for each sales rep, both outside and call center. Each rep is assigned to a profit center and territory.

1. Click on 'Clear to Add' () or press .

2. Enter the Salesperson Code and other field information, including Sales Territory (double-click to bring up possible values), name, address and other detail information, and commission percentages. You can assign them to a specific advertising type such as retail, or multiple types.

3. Click on the sub-screen/button command for 'Sales History & Goals' and enter the monthly sales goals.

4. Click on 'Add' () or press .

How do I enter a new sales campaign?
Daily > Salespeople > Sales Campaign Setup

1. Go to Daily > Salespeople > Sales Campaign Setup to create a campaign. There's a Template Ad #.

2. If the user already knows a PREF ad number to use, they can enter it directly, in which case ad entry will also come up and show them the ad.

3. Double clicking on it will bring up ad entry to create or find a suitable template ad for this campaign.

   • If double click is used and there is currently no template ad, ad entry will do a 'Clear to Add' (). The user can create a "preference ad" (ad with a Hold Code of PREF) for a house or any other account, to use for this purpose. Or the user can find one that already exists using any means otherwise available. When 'Commit Ad' is pressed, instead of clearing the Hold Code to A, the program will set it to PREF, set the ad number on the campaign record, and dismiss ad entry. It will also do an auto save of the campaign record.

How do I manage campaigns?
Daily > Salespeople > Sales Campaign Manager

1. To enter an ad from the campaign for an account that wants one, got to Daily > Salespeople > Sales Campaign Manager.

2. Click into one of the accounts and press 'Enter Ad'. *Although this button exists on every record, it will operate on the selected record even if another instance is pressed.* Ad entry will come up.

   • If the campaign has a template ad, it will be copied into a new ad for this account similar to how preference ads work.

   • If the campaign does not have a template ad, ad entry will do a 'Clear to Add' () and default the rate code to that specified in the campaign.

Ad entry will remain in "campaign mode", setting Camp_no on any ads entered, until an ad is committed. Then, control will return to the sales campaign search screen. In most cases, users should enter ads for the campaign from this screen by pressing "Enter Ad", and commit each ad when done.
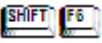
If a user enters multiple ads before committing one, then all ads created will be attributed to the campaign. Once they commit, if they choose to bring ad entry forward manually and do other work there, it will no longer be in campaign mode.

DAILY MENU > ADS

How do I find specific ads?
Daily > Ads

See "How do I enter search criteria?" under THE BASICS.

If you have a list of specific ads you want to look up, click on 'Clear to Find' () or press . Then you can enter all of them in the ad number box, separated by commas. The input area will scroll horizontally as you do this, and you can use the right and left arrows to move back and forth in the input field, as well as the appropriate keys to delete and insert characters.

If you have a range, say 1015 to 1030, you can enter that as 1015-1030. You can actually enter any combination of ranges and individual numbers separated by commas.

How do I reprice ads after a rate increase?
Daily > Ads

We store ad prices for future dates in a database table, that way, when you run an ad edit listing, the system doesn't take forever calculating the price of each ad from scratch but rather looks at that table for the date you're running the report for.

When you do a rate increase:

1. Go into Tools > Batch Updates > Recalculate Ad Prices.
2. If you're increasing just one rate code, type it in. Otherwise, if you're changing all rate codes leave the rate code blank.
3. Choose "Place in Queue Only" and select "Proceed."

This recreates all of the stored future records in that database table with the new prices.

If you don't do this there's the chance, especially with longer running ads (such as TFN ads), that those records will not not have been recreated after the increase and therefore still have the old prices on them. We create run dates for TFN ads for 90 days in the future every time we see that the ad is about to run out of run dates.

If repricing all ads, we suggest doing this process at night so the ad server is not re-calculating prices for all these ads during the day.

What does 'Combo' mean when choosing a run selection for the pub screen?
Daily > Ads > Ad Insertion Entry

The ad will be scheduled as running in combination with this publication/zone but not actually run on this ad. This effects the pricing of the ad. Most users do not have or need this possibility. It is rarely used. This is sometimes referred to as "ad versions."

For example, an ad is to run in two publications and the rate is dependent that it run in both (such as a flat rate that needs to be allocated between the two publications). The rate is $40.00 per inch to run in both pubs. If the ad was to only run in one pub the price might be $30.00 (because they get a break on the second publication). If for one reason or another the ad cannot be scheduled with both publications on it (maybe the ad copy is slightly different between the two so two ads must be scheduled), and the operator simply schedules each ad separately, the price would be $30.00 each, or $60.00. However, if they schedule the ad to run in one publication and combo in the other publication the ad may cost $20.00 for the first ad and $20.00 for the second, thus only charging the $40.00 that was wanted to begin with. To schedule a sale as one ad but enter it as two use the combo field.

How do I add a background color to an ad?
Daily > Ads > Ad Insertion Entry

In order to add a background color to an ad, you need to single-click on the outer edge of the ad so that it becomes surrounded by green dots. (You may find it more useful to first put a border on the text ad although this is not required.) This click on the outer edge of the ad will change the icon bar above the ad to "border icons" rather than the normal Font, Point Size, Bold, etc.

There will now be an icon on the top of the ad window for Background Color. It may not be immediately visible because the icons do not fit across the screen and you must scroll to the right. To scroll, look all the way to the right of that icon line. There are tiny up and down arrows. Hitting these up or down arrows will scroll those icons left and right. Scroll once to the right and choose Background Color.

When done, remove the green dots around the ad by clicking anywhere in the blue background surrounding the ad text. To get your normal Font icons back in view you must hit the scroll arrows once to scroll back to the left.

How do I setup the "New Today" feature?
Daily > Ads > Ad Insertion Entry

1. Create a class code called NEWAD

2. Go into ad entry and using the header account (that you usually use to create your header ads), create an ad for class code NEWAD and import the graphic file for the banner you would like to appear on top of all new ads into the body of this header ad.

3. Create a flat additional charge code called NEWAD and make it a first insertion billing frequency type of flat charge with a flat amount equaling the amount you want charged for this feature.

4. Any ad that you charge this NEWAD flat charge will pass a certain flag in the pagination dump. Pagination in turn knows how to put the logo on top on this ad.

Since the banner won't be physically added to each ad but rather inserted by pagination, no lineage adjustment is necessary and the ad will only be charged for the actual lineage.

How do I create a 'blind box' ad?
Daily > Ads > Ad Insertion Entry

1. Click on 'Clear to Add' () or press .

2. Enter an account number, class code, and rate code, each followed by the key.

3. Select publications and then click on 'Seatbelt/Dismiss Form' () or press . This will return the record to the previous form.

4. Click on 'Add' () or press .

5. Go to the Upsells tab and check the "Reply Box" checkbox. (Step 5 and 8 are required to produce the Box reply text)

6. Click on 'Add' () or press .

7. Type some text in the Publisher window.

8. Click the third icon from the bottom on the right side of the text that says "Box Reply" if you hover over it. (Step 5 and 8 are required to produce the Box reply text)

    If you want to automatically generate a flat charge there must be a flat charge with Auto Flat Type=Box Reply Charge.

How do I setup Upsell Prompts for an ad class?
Daily > Ads > Ad Insertion Entry

1. In the Ad Classifications table, highlight any class and click the 'Flat Charge Upsells' button.

2. In the Flat Charge Upsell Entry window click on 'Clear to Add' () or press .

3. Enter Seq. number 1

4. Enter the Flat charge code for the upsell you want.

5. If you 'Include' by default then this flat charge will be on every ad in this class automatically and the ad taker must remove it if not wanted. If 'Forced', it cannot be removed from ads in this class. If 'Not Included' by default then the Upsells tab will show the feature and the ad taker can add it by checking a box in that Upsells tab.

6. Click on 'Add' () or press .

7. Upsells are created individually for each class but are easily copied from one class to another. Highlight the next class for which you want Upsells and Copy From the class you have already setup.

How do I lock ads?
Daily > Ads > Lock Ads for Deadline

The Lock Ads file can have multiple records allowing you to lock some ads at different times than other ads. For example, you may choose to lock class ads for a selection of classifications. In order to lock ads for the first time you must:

1. Click on 'Clear to Add' () or press . This opens a new record with a new sequence number.

2. Enter the lock date.

3. Select whether Class or Display ads will be locked, and other information as necessary.

4. Click on 'Add' () or press . This will update the record and lock the ads.

The next time you want to lock this selection of ad records just change the lock date and click on 'Add' () or press . The lock will then process.

How do I roll back a lock date if I lock a date too soon?
Daily > Ads > Lock Ads for Deadline

1. Simply change the lock date to the correct date.

2. Click on 'Add' () or press . The lock program will recognize the earlier date and automatically roll the lock back.

DAILY MENU > ACCOUNTING

How do I enter a dispute?
Daily > Accounting > Transaction Dispute Maintenance

1. First you will need to find the transaction in dispute. Click on 'Clear to Find' () or press . Enter the account number to list all transactions for that account. You may also search on transaction number or pub date. Then click on 'Find' () or press .

2. Click on the transaction that you wish to mark as in dispute. Enter the dispute code (double-click if you need to look up the list of dispute codes.

3. To update the modification to the database click on 'Add' () or press .

How do I lock payment dates?
Daily > Accounting > Payment Lock Date Maintenance

Enter the desired payment date and click on 'Add' () or press .

When a pre-paid ad is killed early, what happens to the remaining pre-payment?
Daily > Accounting > Payments-Adjustments-Discounts

If you are refunding the money: Put the ad # on the refund. The system will apply that refund to the ad and also finish applying the prepayment. The entry of the refund is all you need to do.

If there is no refund: If you want to apply the rest of the money to the account, remove the ad # from that payment. The system will then apply the remainder of the payment to the oldest balance. You can also choose to manually apply the payment.

How do I find pre-payments on killed ads if an ad taker doesn't tell the accounting department?
Daily > Accounting > Payments-Adjustments-Discounts

Run the "Over Payment of Expired Ads" report under Reports > Accounting.

How do I handle Small Balance, Bad Debt and Abandoned Properties Write-Offs?
Daily > Accounting > Bad Debt WO/sm Bal WO/Aband Prop Rpt

You can write off small balances for accounts, bad debt accounts or process abandoned properties for your state.

Report

- **Report / Update Options:** Report Only/Report & Update. You have the option of running only the report before doing any updating to see exactly which accounts and for what amounts will be written off. If you don't want to write off small balances for particular accounts you can to into the advertiser maintenance screen and under "Write Off Small Balances" select No.

- **Print Address:** Yes or No

- **Report Title:** Abandoned Property/Small Balance Write Off/Bad Debt Write Off. This is the title that will print at the top of the report.

- **Sort Option:** Acct #, Acct Name or Salesperson / Acct Name

- **Create ASCII File:** Yes or No

- **Include Header in ASCII File:** Yes or No

- **Print Accts with Write Off Flag set to No:** Yes or No. If you want to see accts that have been flagged to NOT write off small balances, you can still see them on the rpt if they fit the criteria chosen.

Selection Criteria

- **Advertiser Type:** Commercial or Transient or Both

- **Include Inactive Accts:** Yes or No

- **Acct Range:**

- **Write Off Date:** This is the date that will be used on the adjustment records created to write off the small balances.

- **Write Off Batch Code:** This is the batch code that will be used on the adjustment record.

- **Write Off Description:** This description is placed on the adjustment record, the second part of the payment description.

Commercial and/or Transients. You can go into Profit Center Maintenance and select 'Small Balance Write Off Defaults' and set the defaults for the following questions:

- **Write Off Debit Balances:** None, Over 30, Over 60, Over 90, Over 120, Over 150..None: you don't want to write off any small debit balance. Over 30, Over 60, etc.: if the customers balance is below the write off amount and is in or over the aging bucket selected it will be chosen to be written off.

  - **Small Balance Write Off Code:** The Pay/Adj code to use for the adjustment transaction

  - **Small Balance less than or equal to:** The max amount you consider a small balances. All balances equal to or less than this amount will be chosen to be written off.

- **Write Off Service Charges:** None, Over 30, Over 60, Over 90, Over 120, Over 150

  - **Service Charge Write Off Code:**

  - **Service Charge Amts less than or equal to:**

- **Write Off Bad Debt Balances:** None, Over 90, Over 120, Over 150. None: you don't want to write off any bad debt balances. Over 90, Over 120, etc.: if the customers balance is below the write off amount and is in or over the aging bucket selected it will be chosen to be written off.

  - **Bad Debt Write Off Code:** The Pay/Adj code to use for the adjustment transaction

  - **Small Balance greater than:** All bad debt balances greater than this amount will be chosen to be written off.

  - **Bad Debt Credit Collector Code:** The credit collector assigned to the bad debts being written off

- **Write Off Credit Balances:** Under, Over, Both, None

  - **Write Off Credit Balances = or under:** For example, you want to write off credit balances between 50.00 and .00, then enter -50.00 here.

  - **Write Off Credit Balances = or over:** If you want to write off credit balances over 50.00, then enter -50.00 here.

  - **For accounts with no activity since:**

  - **Using Credit Write Off Code:** The Pay/Adj code to use for the adjustment transaction

Abandoned Properties. Some states require that money owed to customers after a certain time period must be paid to the customers. For example, the state of New Hampshire requires that the company attempts to contact the customers and let them know they have a credit balance and send out checks to those customers. If there are remaining credit balances, than that total dollar amount gets sent to the state of New Hampshire as abandoned property. They send the Abandoned Property Report with the list of customers owed and a check for the total amount.

- **The process that was followed:**

    1. Run the abandoned property report, 'report only', to get a complete list of all advertisers that require refunds.

    2. Send mailgrams to all advertisers that have credit balances and are considered abandoned property.

    3. Flag the advertisers (on the advertiser maintenance screen) that you hear back from to "NOT write off small balances".

    4. Run the abandoned property report, 'report only'. This will give you a list of just the amounts that need to go to the state.

    5. Run the same abandoned property report in 'report / update' mode to write off this group of advertiers.

    6. Go back into the advertiser maintenance screen and set the accounts that need refunds to "YES write off small balances".

    7. Run the abandoned property report, 'report only'. This will give you a list of accounts and amts that require refunds.

    8. Run the abandoned property report, 'report / update' to write that group off.

How do I use the field holders in Mailgram Maintenance?
Daily > Accounting > Mailgram Maintenance/Print

1. Click on the field holder and select 'Edit' from the menu bar. Click on 'Copy.'

2. Click on the line and position in the letter where you would like to place the field holder.

3. Select 'Edit' from the menu bar. Click on 'Paste.' There are control keys shown on the edit selection that may also be used.

How do I extract data to send to a third-party?
Daily > Accounting > Export Files to Data Warehouse, or Sarbanes-Oxley Security Export, or Marketing Solutions Group export, or Export Monster File

Under Daily > Accounting, choose the export you wish to do (Export Files to Data Warehouse, or Sarbanes-Oxley Security Export, or Marketing Solutions Group export, or Export Monster File). Choose the available options from whichever export you are doing:

- Export Files for Data Warehouse

  - Starting and Ending Period

  - Include Transactions, Payments, Adjustments, Discounts

  - Server name, Date & Time to begin processing

  - Requeue schedule options

- Sarbanes Oxley Security Export

  - Server Name, Date & Time to begin processing

  - Email - Yes or No. If yes email address to send to

  - Requeue Scheduling options

- Marketing Solutions Group Export

  - File structure for export (comma, fixed, tab, pipe)

  - Server name, Date & Time to begin processing

  - Requeue schedule options

- Export Monster File

  - Data Selection Filters: Account Range, Zip Code, Account # (from & to), Account Start Date (from & to), Sic Code (from & to), Nic Code (from & to), Geo Area (from & to), Salesperson (from & to) etc.

  - To Email Address & From Email Address

  - Output File Name: File is placed in /vdata/print + file name entered

  - Type of file export - Advertiser account list or Ad detail list

  - Include Headers in the Ascii File?

  - Tab or Comma delimited

  - Create the file into a spreadsheet or just Create the file or Create the file and email it.

SALESPERSON MENU

How do I e-mail a customer?

If you just want a list of accounts that have email addresses in the system, you can go into Daily > Advertisers > Advertiser Listing and click on "print accounts with email address" only,

or

You can create a mailgram letter (with the information you want to send to your customers) and you can choose to send that as e-mail (this is an option on the mailgrams or labels screen). The customers will get that letter as a PDF attached to their e-mail.

MONTH-END MENU

How do I know what should be set-up and checked before running the Month-End?

The rules for the month end are set up in the profit center table. If this is the first time you are running the month end process for this profit center, check the following fields in the profit center to be sure they are answered correctly before going on. For more details on each of these fields refer to the Profit Center > Profit Center Detail section of this manual.

- Prompt Pay Discount
- Disc on Over Due
- Earned Rates
- Billing Fee and Add'l Billing Fee amount
- Finance Charge

- Finance Charge on the over 30, 60, 90...
- Finance Charge %
- Minimum Finance Charge
- Contr Purge Days
- Trans Purge Days

The period should also be set up for the next period. For more information on how to setup a new period see the Tables > Period Maintenance section of this manual.

What exactly does the Month-End do?

- Earned Rates are calculated for each account.

- Aging Periods are calculated for each account.

- Finance Charges are accumulated on each account and added to the balance due if the account fits the criteria.

- The Billing Fee is applied to accounts that should receive one. The Billing Fee is actually a new transaction that will print on the bill as a last transaction and will appear in the account status as a detail line item.

- A picture of the account balance, month-to-date sales, month-to-date payments, opening balance, Current, 30, 60, 90, 120, 150, 180, finance charge, and prompt payment discount is taken of each account and stored into a record for the month being closed. A new balance record is opened for the new period that is about to begin. This process allows the system to print prior month statements exactly as they printed during the month being closed. If this is a year-end as well as a month-end, the year-to-date figures will be cleared on the new period account records to start the new year.

- Contract History is handled much like the account balances where a new contract history record is created for each period. If year-end, the year-to-date figures will be cleared on the new period.

- The profit center current period is set to the next period. This will then allow payments and transactions to be entered for the new period.

- Ads are purged.

How do I add a message?
Month-End > Monthly Statements

Each message type and set of four message lines is a separate record and must be accessed accordingly. Click on 'Clear to Add' () or press . Then enter the message type and message. To store the record, click on 'Add' () or press . To access the next message, repeat this process for each message that you enter.

How often should I purge History?
Month-End > Purge History Files

Some users prefer to purge history every month; purging one month, every three months; purging three months, every six months; purging six months and so forth. The only restriction on how much history can be retained is the hardware; disk capacity. The purge only purges transactions that are older than the purge days and are paid. The same with the payments and adjustments, that are older than the purge months and are applied to transactions. Therefore, transactions in dispute will remain in history until released. When purging you may select to only purge contract advertisers, transient advertisers or both. Remember if you require the ability to re-print or look up statement activity for at least 24 months then you do not want to purge months less than that.

TABLES MENU

How do I add spot color and full color with specific color choices?
Tables > Miscellaneous Code Tables > General Codes

Color options can be free form or required values. If the colors are free form, simply enter the color such as RED. If specific colors codes are required for your layout and/or pagination application the possible choices must be entered in a table as follows:

Go to Tables > Misc Code Tables > General Codes (first selection on the submenu)

1.   Click on 'Clear to Add' (🔲) or press SHIFT F7.

2.   Choose "Valid Color Names" from the Type dropdown.

3.   Enter a valid color choice and description.

4   Click on 'Add' (➕) or press F7.

Repeat as many times as needed.

Once you have set up one or more of these, any others will be considered invalid. A zoom will be available to show the valid choices.

This is system wide.

How do I enter a new Sales Main Territory?
Tables > Miscellaneous Code Tables > Sales Main Territory

The Total Advertising system provides the ability to create multiple sales tiers for reporting and management. A Sales Main Territory can include areas or department managers, depending on how you would like to view the information. Lesser tiers are described below in Sales Territory Codes.

1.   Click on 'Clear to Add' (🔲) or press SHIFT F7.

2.   Enter a user-defined Main Territory Code and Description.

3.   Click on 'Add' (➕) or press F7.

How do I enter a new Sales Territory?
Tables > Miscellaneous Code Tables > Sales Territory Codes

The Total Advertising system provides the ability to create multiple sales tiers for reporting and management. A Sales Territory Code can include smaller areas, advertising types or lesser department personnel than a Sales Main Territory, depending on how you would like to view the information.

1. Click on 'Clear to Add' ( ) or press .

2. Enter a user-defined Territory Code and Description.

3. Assign each entry to a Main Territory Code if applicable (double-click to bring up possible values). If you do not use Main Territory Codes the default will be an 'A' for Not Applicable.

4. Choose whether this code is 'Active' or 'Inactive'

5. Click on 'Add' ( ) or press .

How do I enter a new Salesperson?
Tables > Miscellaneous Code Tables > Salesperson Codes

Every salesperson for which you will want to track commissions, both classified and display, should be entered here.

1. Click on 'Clear to Add' ( ) or press .

2. Enter a user-defined Salesperson Code and Description.

3. Click on 'Add' ( ) or press .

What controls the line count in the system?
Tables > Ad Settings Maintenance

Under Tables > Ad Settings Maintenance, there is a "Height" setting for liner ads. If you then look at any liner ad it has a depth in points displayed in the "Text" tab. For ads billed by the line you divide the ad depth by the setting Height to calculate the number of billable lines.

If you want more billable lines, reduce the Height setting. If you want fewer billable lines, increase the Height setting. For normal text the number of billable lines should be the number of physical lines. For larger point sizes, bold type, or anything which increases the line height, the number of billable lines can and will become larger than the number of physical lines. Exactly how Vision Publisher increases this ad depth is a function of font and other attributes.

How do I copy user privileges to a new user?
Tables > User Setup

Note: The new user must have already been created in the system prior to this.

1. Go to Tables > User Setup.

2. Find and highlight the user you want to copy.

3. On the top right corner of the screen, enter the new users log in the 'To User' box.

4. Click 'Copy User'

This will give the new user the same exact privileges and user setup as the copied user. You can then change whatever you need such as default printers, email address and so on in the new user.

PROFIT CENTER MENU

How do I add a new profit center?
Profit Center > Profit Center Selection

Select the Profit Center Detail sub-screen from the Profit Center Selection screen. Once the Profit Center form is displayed click on 'Clear to Add' (![icon]) or press ![SHIFT][F7]. Enter all of the pertinent information and then click on 'Add' (![icon]) or press ![F7].

How do I select an existing profit center as the one for reports and file maintenance?
Profit Center > Profit Center Selection

Select the Profit Center you wish to use by either double-clicking on the Code, or clicking on the code and clicking the 'Dismiss Form' icon (![icon]) or pressing ![F1]. From that point on when running reports or entering data you will entering the data for the new profit center selected and displayed on the menu.

How do I modify an existing profit center?
Profit Center > Profit Center Maintenance

Select the Profit Center you wish to modify. Select the Profit Center Detail sub-screen from the Profit Center Selection screen. Once the Profit Center form is displayed, enter all of the modifications and then click on 'Add' (![icon]) or press ![F7].

How do I make my searches more consistent?
Profit Center > Profit Center Maintenance

When entering tickets into Vision Total Advertising, you need to use capital letters when typing in the source number. If lower case is used, the search function will not work.

To make this change permanent, under Profit Center Maintenance, press "Optional Settings" and check "Upper" to force entry of upper case so that your searches will be consistent.

TOOLS MENU

How do I print the screen I'm looking at?
Tools > Print Screen

When you need to print the screen you are working on, click on 'Tools' on the menu bar and 'Print Screen,' This will change your cursor to a + (cross or plus). Simply move this cursor over the form/screen you wish to print and click with your left mouse key.

How do I reprice TFN ads after a rate increase?
Daily > Ads

See "How do I reprice TFN ads after a rate increase?" under DAILY > ADS.

PREFERENCES MENU

How do I adjust the size of my virtual desktop session window?

There is a solution for VNC users to scale the screen. Use the link below to download the Ultra VNV viewer:

http://www.uvnc.com/download/1055/1055viewer.html

Start the viewer and click the options button on the right. Deselect "Auto select best settings," make sure "Full Colors" is selected and check the "Auto" box of the "Viewer Scale" setting on the lower right of the screen. Click "OK", then check the "Save connection settings as default" box at the bottom of the first screen.

Connect to port 5950 and the viewer will scale the entire screen to match the users desktop size.

How do I make 'My Menu'?
Preferences > My Menu Selections

To customize 'My Menu' go to Preferences > My Menu Selections. This will open the Customized Program List screen.

1. Click on 'Clear to Add' ( ) or press .

2. Enter any sequence number from 1 to 15 -- 1 will appear at the top of the My Menu list and 15 at the bottom.

3. Select the program you wish to add by double clicking on the program name box. A list of available programs will display, ordered in the same basic order as seen in the main menu. You can scroll through the list or search by name. Be sure to surround the search string with *'s so that you are more likely to find what you are looking for.

4. Highlight the program name you want to add by clicking on it once.

5. Click on 'Previous Form' ( ) or press to add it to the Customized Program List screen.

6. Click on 'Add' ( ) or press .

The program will appear in your My Menu list the NEXT time you log on.

OPTIONAL ADD-ONS

Interface to 3rd-party Credit Card Verification

In order to have real-time credit card payment processing in Total Advertising, you must have the optional interface to a third-party payment processing system such as ICVERIFY®.

How do I setup ICVERIFY®?

1. Obtain the ICVERIFY® (800-811-1371) software and install it on a (preferably dedicated) PC on your network.

    •   You will be asked you how many licenses you need. This is the total number of **concurrent licenses** that you will be using; not necessarily one for each user but just an estimate of how many users would be submitting credit cards at the same exact time.

    •   Make sure you ask for the **online version** of the software which submits transactions online as opposed to doing so through a dial up connection.

    •   Also ask for the **regular ICVERIFY®, not the Enterprise edition**.

2. Obtain your processor setup information for the processing network (or networks) which you have been set up for. Your financial institution will be able to provide you with this information. Each network used will require different setup information. Run the setup program and enter the setup information (contact ICVERIFY® if you need help)

3. Contact ICVERIFY® to obtain your Validation. You need this to complete your setup.

4. Make sure the 'SDK RESP/Y/N/B/L/D/S' field on the Merchant Information tab is set to 'B'.

5. There are 2 ways for settling your Credit Card transactions:

    •   Automatically: done at a certain time every night at a preset hour (ex: 2:00am).

    •   Manually: option in the Credit Card Batch Manager process that you run every day end.

    Call your financial institution for this and tell them which option you choose. If you choose the Auto-Settle, you can setup which time you want it to settle each night on the Merchant Information tab in the ICVERIFY® setup program.

6. ICVERIFY® will walk you through running a stand-alone test from that PC to make sure everything is setup and working the way it should.

7. Call the Vision Data Systems Dept. to have them map the /vdata/arv/icverify directory on shemp to a drive on your PC (ex: M:). Also have someone in the Total Advertising Department hookup the Vision Data part of the installation.

8. Run the ICVERIFY® multi-user program and have the 'Request Directory' point to the mapped drive on shemp (ex: M:) then click 'initialize'.

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9. In Total Advertising, go to Tables > Miscellaneous Code Tables > Credit Card Codes and make sure those are set up the way you want them to be.

10. Your Installation is now complete. Make sure that whenever you restart the PC where ICVERIFY® is set up, you repeat step 8. It's always best if you put the ICVERIFY® multi-user program in the startup procedure of your PC, although you will still need to point it to the right directory and hit initialize.

How do I enter credit card payments?

There are two places where you can enter your Credit Card transactions in Total Ad:

- • The Payment screen off the Ad Insertion Entry screen
  (Daily > Ads > Ad Insertion Entry)
- • The Main Payment screen on the Accounting side
  (Daily > Accounting > Payments-Adjustments-Discounts)

The procedure from both screens is exactly the same.

1. Click on 'Clear to Add' () or press .

2   Enter all your payment information as always, then go down to where it says "credit card entry".

3. Type in your credit card type (you can always double-click there to find out what credit card types you have set up on your system), then type in the credit card number and expiration date.

4. Click 'submit'. Your transaction will now be submitted to ICVERIFY® and you will get a response message saying whether your transaction was approved or rejected.

    Occasionally ICVERIFY® may be down. Maybe the PC where it was setup has been restarted and no one restarted the ICVERIFY® software, or whatever other reason. Whenever you try to submit a credit card entry, the program first checks for any other transactions that did not get submitted due to ICVERIFY® being down. If it finds any, you will get a message saying that "ICVERIFY® appears to be down." Whatever transactions where previously submitted during that period will automatically be resubmitted later on when you run the cleanup process.

    Then it will try to submit your transaction, and if ICVERIFY® is still down at that point, you will get another message saying "No response from ICVERIFY®, continue to wait?". If you say yes it will sit on your screen and try to resubmit the transaction. If you say no, it will save the payment in the Vision Data database with a PENDING status on it and again, it will automatically resubmit the credit card transaction at the end of the day when you run the cleanup process.

5. At the end of the day, someone should run the "Credit Card Batch Manager" (Daily > Accounting > Credit Card Batch Manager). This takes care of any transactions that have not been processed earlier for any reason. If you're setup for Manual settling of your credit card transactions, make sure you check both the "settle with credit processor" and "credit card cleanup process" on your Credit Card Batch Manager screen. If however you're setup for automatic settling, you only need to check the "credit card cleanup process" checkbox.

    You can run this procedure as many times as you want during the day, but it has to be run at least once every day.

Vision E-Tearsheet Module

How do I Setup and use Electronic Tearsheets?

1. Set up a tearsheet code of 'E' for electronic tearsheets in the tearsheet code table.

2. The .pdf files for the tearsheets should be in the following directory: *vdata/arv/etears*. The naming convention will depend on your pagination system. Minimally we need the Publication, Run Date, Section Ran, Page Ran. A sample .pdf name may be :

    > *PPP_A_EEEE_MMDDYYYY_SS_ppp.pdf*
    > PPP = publication   MMDDYYYY = month,day,year
    > A = zone   SS = section the ad ran in
    > EEEE = edition   ppp = page the ad ran on

3. Each advertiser to be sent an electronic tearsheet needs to be set up with:

    *   e-mail address

    *   tearsheet code of 'E'

    *   # of monthly tears = 1

4. You can also send additional e-tears to advertisers using the e-mail address found on the 'contacts / alt addr' screen in advertiser maintenance. On this screen you need to have:

    *   e-mail address

    *   print tearsheets label box needs to be checked

    *   tearsheet code of 'E'

    *   # of tearsheets = 1

5. You need to import into the Total Ad system, the sections and pages the ads ran on from your pagination system. This tells the tearsheet report which .pdf's go with which ads so they can be emailed to the correct advertisers.

6. Run the tearsheet report:

    *   if you select to print labels, they won't print for advertisers set up with tearsheet codes of 'E'

    *   **Starting / Ending Publication Date:** you can run the electronic tearsheets for 1 publication date or a range of publication dates.

    *   **Max # of .pdf's per E-mail:** select the number of .pdf's to be sent per e-mail. I wouldn't suggest using more than 5 .pdf's per email. The e-mail would be quite large and may take awhile to send and receive.

- **Actually send the e-mails:** if you would like to run the report to see what would be sent without actually sending the e-tears, then say 'N' to 'actually send the e-mails'.

- **PDF holiday date:** if the run date on the ad is different from the .pdf date, then you can enter a 'pdf holiday date' and that will be the date the report will use in naming the .pdf

- **Send to / CC: E-mail:** if you would like to send or cc: all the emails to another email address, enter it here. You can then select if you want 'send to this email only' or 'cc: to this email'. Again, for testing purposes you could send all the emails to yourself by entering your email address here and selecting to send to email only.

- **Reply to E-mail:** enter a 'reply to' e-mail address. If an e-mail is not successfully sent in the e-mail system, it will 'bounce' back to this e-mail address.

- **E-mail Subject:** enter a 'subject' to be included in the e-mail being sent.

- **E-mail Message:** enter a 'message' to be included in the e-mail being sent.

- a list of all the e-mailed tearsheets will print at the end of the tearsheet report.

- will automatically e-mail the tearsheet .pdf's to all the e-mail addresses for the advertisers that are set up with a tearcode of 'E' and fit the report criteria entered.

- you may see either of the following message on the tearsheet report:

  - *** e-mail not sent, no .pdf found *** This means that the .pdf does not exist in the /vdata/arv/etears directory, therefore it can't be emailed. Check with whoever places the .pdf's in that directory to see why it is missing.

  - ** *Ad did not run, no .pdf to send* ** This means that either the ad didn't run in the paper, or the section/page were not imported correctly from the pagination system. The section and page that were imported for that ad is printed on the line above the .pdf file name on the report.

Manually E-mail a PDF

In the upper right hand corner you will see a button that says: *'Manually E-mail a PDF'*

From this screen you can enter an acct # which will display that accounts email address. Or you can enter any email address that you wish to send a pdf to. You then enter the PDF name you want to email. It defaults to the directory where your etears are located, you just have to add the rest of the PDF name. When you have entered all you info, click on the 'send e-mail' button. It will display a message when the email has been sent. Click on 'done' to exit that window.

Option to actually send the email

On the screen you will see 'Actually send the e-mails, Yes or No'. Some users have requested a flag to not actually send the emails. It will process everything as normal, but not send the emails out. It will default to 'Y'.

Values to be included in the email message area

You will see all the fields that can be included in the message area of the email, such as Ad #, Acct #, etc. It will default to include all of them in the message area.   You can 'unclick' on them if you don't want certain information to be sent. This information will print for each PDF for that you email.

Option to also send the all the etears to another email address

You have the capability of sending all the etears produced in this run to another email address, such as a salesperson's. Just enter their email address. You also have the option of 'only' sending the etears to that email address, or to also send them to the email address you enter as well as the advertisers email address.

Gang Ads

When entering gang ads into ad entry – make sure you link the individual 'billing only' ads to the main 'layout only' ad by placing the 'layout only' Ad # into the 'Gang Ad#' field on the ad layout screen for the individual 'billing only' ads. Then when you import section / page, it will update all the 'billing only' ads with the section / page they ran on.

Double Truck Ads

If an ad is marked as 'Double Truck' on the ad entry layout screen, then 2 .pdf's will be emailed, one for each page.