Activation Checklist

This checklist provides a list of items that will be encountered before and after your activation for Marketron Exchange. By addressing these items at the appropriate times, we ensure a smooth transition. Review each section of the checklist for your traffic system and verify that all items have been covered.

Prior to activation, the following items need to be addressed:

User Roles and Data Folder Locations

This section will help you identify people in your organization to fill crucial roles, as well as identify data folder locations for incoming order data.

Exchange Coordinator

Identify one person for each market or one overall coordinator for multiple markets.

The Exchange Coordinator will be responsible for the initial setup process with the assistance of a Marketron representative. Exchange Coordinators serve as your organization's first point-of-contact for questions regarding Electronic Orders and Invoices.

The Exchange Coordinator needs to understand basic software installation and network pathing. An IT co-coordinator may also need to be defined.

☐ **Completed** ☐ **N/A**

Order Monitors

Identify Order Monitors for each of your typical order types.

- Orders received from a national rep firm, such as Katz or McGavren Guild.
- Orders received from a local/regional agency's order portal, such as "AE Inbox".
- Internally-generated orders, such as those created in SmartRate or Tapscan.

Depending on your internal workflow, only one Order Monitor may be needed, such as a Traffic Manager. Or, it can be different people. Typically, a National Sales Manager and/or Assistant will monitor for national orders and a Traffic Manager or Sales Assistant will monitor for local and internally-generated orders.

Don't forget to include the people who serve as backup for these personnel.

The Marketron Exchange Client application will be deployed for these users, and their backups. Once this setup is complete, there is little to no daily work for these users. However, they are responsible for monitoring any incoming orders that may need attention.

☐ **Completed** ☐ **N/A**

Data Folder Locations

Identify the network drive and folder(s) where received order files will be placed. This should be a shared network location that is available to all users. Marketron recommends a subfolder named "Electronic Orders." Communicate the location of this folder to your staff.

☐ **Completed** ☐ **N/A**

Application Installation

Marketron Traffic	Visual Traffic	DeltaFlex
Electronic Contracting is installed and activated for your database. **To verify:** Log into Sales Order or Document Manager > click on the Import button found in the Home tab of your ribbon and EC should launch. ☐ **Completed** ☐ **N/A** Verify that an updated version of Electronic Contracting (EC) has been installed. **To verify:** Log into EC and go to Help>About. The version number should read 6.8.0.29 or higher. If this is not correct, please contact your IT department. ☐ **Completed** ☐ **N/A**	The Order Import folder has been created on the VT Server and any workstation that will import orders has been mapped to that folder. **To verify:** Go to VT > Orders > Order Import Queue and confirm a path has been selected for the Order Import folder (this path may only be set from the VT Server). ☐ **Completed** ☐ **N/A**	SalesLink is installed on each PC that will import orders into DeltaFlex. **To verify**: Go to Start> Programs>Wicks Broadcast Solutions>SalesLink and launch SalesLink. If not, install it from your latest Broadcast Studio CD. Contact Marketron Support if you need an installation file. ☐ **Completed** ☐ **N/A**

Electronic Orders and Invoices

Activation Checklist

Marketron Traffic	Visual Traffic	DeltaFlex
Electronic Invoicing is installed and activated for your database. **To activate agencies for EI**: Log into Setup Editor and go to Names>Agencies. Open an agency participating in EI. On the General tab, click on the jump button (…) to open the Exchange search engine > search for the agency > click the “Select” link > verify the Electronic Agency ID is present and place a check mark in “Electronic Invoicing” > save. If your agency is not listed, please have the agency visit our website on the Support tab at www.marketron.com to sign up. Direct Advertisers can be added via the jump button (…) at the station level by clicking the “Add Client” button in the Exchange search engine. ☐ **Completed** ☐ **N/A**	Invoice Express is activated for your database. **To activate**: Go to Windows Start Button > All Programs > Marketron > License > Internet Update. Invoice Express should be listed as a product under your customer number. ☐ **Completed** ☐ **N/A**	Invoice Express is installed at least one PC used for DeltaFlex billing. **To verify the installation**: Go to Windows Start Button > Programs > Wicks Broadcast Solutions > look for Invoice Express > Admin Console > System > Settings (v.1.4 or higher is recommended for DeltaFlex v4.6 and higher). **To activate**: Go to DeltaFlex AR>Menu E>AR Address and Controls>Invoice Controls and verify the invoice export path. ☐ **Completed** ☐ **N/A**
Marketron Exchange Client is installed for the applicable users. ☐ **Completed** ☐ **N/A**	Marketron Exchange Client is installed for the applicable users. ☐ **Completed** ☐ **N/A**	Marketron Exchange Client is installed for the applicable users. ☐ **Completed** ☐ **N/A**
All applicable users of Marketron Exchange have received their user name, password, and customer number. This login information is unique to Marketron Exchange and is required for setup. ☐ **Completed** ☐ **N/A**	All applicable users of Marketron Exchange have received their user name, password, and customer number. This login information is unique to Marketron Exchange and is required for setup. ☐ **Completed** ☐ **N/A**	All applicable users of Marketron Exchange have received their user name, password, and customer number. This login information is unique to Marketron Exchange and is required for setup. ☐ **Completed** ☐ **N/A**

Electronic Orders and Invoices

Activation Checklist

Training

Marketron Traffic	Visual Traffic	DeltaFlex
Electronic Contracting training is complete. ☐ **Completed** ☐ **N/A**	Electronic Order Import training is complete. ☐ **Completed** ☐ **N/A**	SalesLink training is complete. ☐ **Completed** ☐ **N/A**
Electronic Invoicing training is complete. ☐ **Completed** ☐ **N/A**	Electronic Invoicing training is complete. ☐ **Completed** ☐ **N/A**	Invoice Express training is complete. ☐ **Completed** ☐ **N/A**
Marketron Exchange Client Application training is completed for the designated Exchange Client users. ☐ **Completed** ☐ **N/A**	Marketron Exchange Client Application training is completed for the designated Exchange Client users. ☐ **Completed** ☐ **N/A**	Marketron Exchange Client Application training is completed for the designated Exchange Client users. ☐ **Completed** ☐ **N/A**

Other Sources

Your station(s) may receive orders from one or, in most cases, several outside sources. These may include national or regional rep firms, buying services, or a local CRM/sales management system. These systems may need to be additionally prepared to send orders though Marketron Electronic Orders.

For a current listing of order senders and systems integrated with Marketron Electronic Orders, view the user-orientation webpage at http://www.marketron.com/exchangeapp.

There you will find information for how to contact these senders, and links to Quick Reference documents outlining the procedures for each system.

☐ **Completed** ☐ **N/A**

Received Orders

After the activation, review the instructions for how to establish settings and use the Marketron Exchange application to receive orders.

☐ **Completed** ☐ **N/A**

Log into Marketron Exchange and go to Help > Contents. This will bring up the help file that will walk you through the process.

Or

If you have not already done so, download the Marketron Exchange manual for your traffic product found at http://marketron.com/exchangeapp (content is identical to the help file.)