

Overview

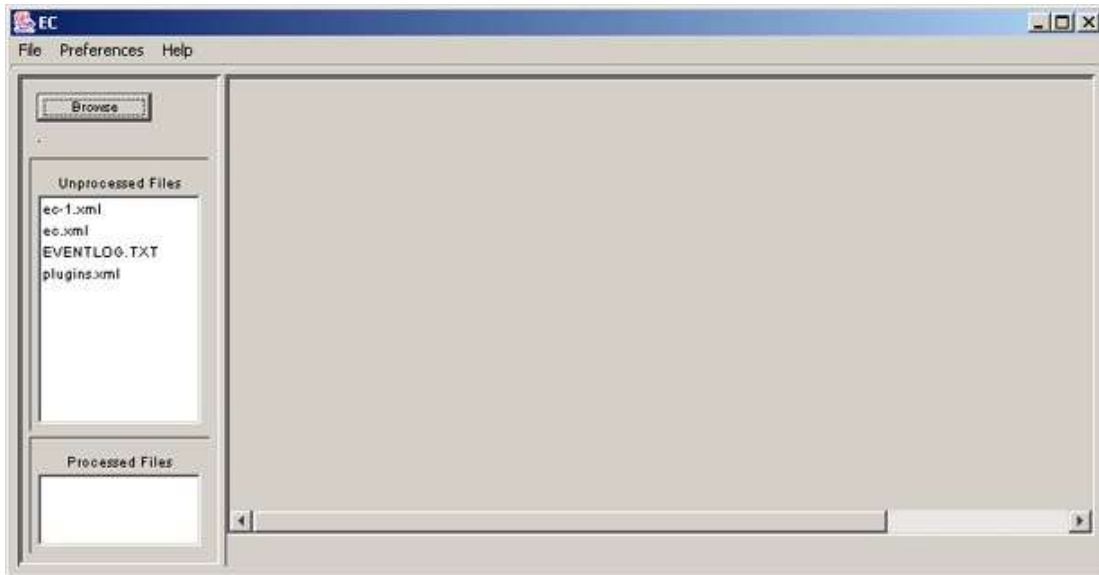
This is the document for Marketron’s Electronic Contract (EC) module, version 6.2.

EC is a utility that converts specially prepared non-Marketron orders into Marketron sales orders. This utility is necessary because order values (advertisers and revenue types, for example) might not be identical in the non-Marketron and Marketron systems. EC shows you what the value is in the non- Marketron order, and it allows you to specify what the value should be in the Marketron order.

Part 1: Accessing EC

The EC utility can be accessed in Document Manager or Sales Order. To access EC in Document Manager, click the EC button on the toolbar.

To access EC in Sales Order, click the Import button on the toolbar. Either of these actions brings up the EC window.



Part 2: Using EC

Follow these steps to convert your specially prepared non-Marketron orders into Marketron Sales Orders.

2.1 Specify the Source Folder

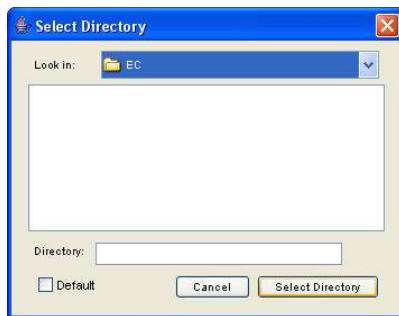
You first must specify which folder on your computer or network contains the non-Marketron order files that you want to convert. The non-Marketron order file type varies depending on the order's original system. For instance, if the order originated in the Tapscan system, it is prepared for Marketron in an XML format (filename.xml); if the order originated in the Donovan system, it is prepared for Marketron in a TXT format (filename.txt).

To specify a folder location:

1. Click the Browse button in the top-left corner of the EC window.
2. In the Select Directory dialog box, use the Look In dropdown and the corresponding directory lists in the middle of the dialog box to specify the folder that contains the non-Marketron order files. The individual files in the folder will not be visible after the folder is selected.

NOTE: You can instruct the Select Directory dialog box to automatically open the currently selected folder in the future by checking the Default checkbox.

In the example below, the non-Marketron order files are contained in the folder called "EC files", and this folder is being made the default.

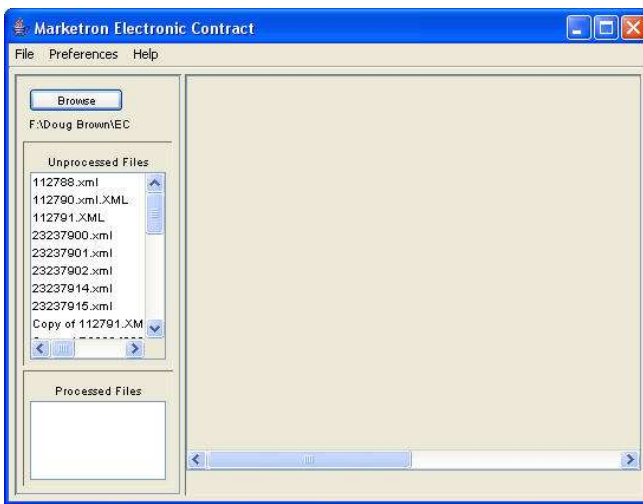


3. Click Select Directory. The Select Directory dialog box will disappear.

HSP Users Only: If you access EC over the HSP platform, your non-Marketron order files must be kept on local or network drives with drive letters from C through K. All drive letters from L to Z are utilized by Marketron's HSP servers and cannot be accessed.

2.2 Choose the File to be Converted

After completing Step 2.1, the left side of the Marketron Electronic Contract window will display all the non-Marketron order files in the specified folder.



To choose a file to convert, click once on the file name. The right side of the window will then display the conversion dialog, which is discussed in Step 3.

2.3 Select the Affiliations

After completing Step 2.2, the right side of the EC window will display a conversion dialog. This dialog contains fields and dropdown boxes that are used to view the database values in the non-Marketron order and select what the equivalent values will be for the Marketron sales order.

Field	Source Values	Marketron Values
Status		Pending - Ready
Salesorder Name	800FLOWERSJUNE	
Product	Daily Buy Test	
Field	Source Values	Marketron Values
Advertiser	1-800-FLOWERS	Select an Advertiser
Agency	AD WORKS	Select an Agency
Revenue Type		Select a Revenue Type
Primary Competitive Code		Select a Primary Competitive Code
Secondary Competitive Code		None
Billing Cycle		Select a Billing Cycle
Sales Rep	JAY JOHNSON	JAY JOHNSON
Makegood		Select a Makegood
Field	Source Values	Marketron Values
Station	STATION-A	Ignore Station

View Summary Save Contract

The following fields are used to set up the new Marketron sales order:

- **Status**—Choose the status of the new Marketron sales order. The status determines which affiliations are required before the order can be converted. If you choose Work in progress, the Advertiser, Agency, and Salesperson affiliations must be specified. If the selected advertiser is a direct advertiser, the agency dropdown will be disabled and you will not be required to choose an agency. If you choose Pending-Not Ready or Pending-Ready, the Advertiser, Agency, Revenue Type, Primary Competitive, Billing Cycle, Salesperson and Makegoods affiliations must be specified.

NOTE: Required affiliations are indicated by a red status LED. Be aware that you must specify affiliation values for required affiliations even if the source field on the left is empty.

- **Salesorder Name**—Enter a name for the new Marketron sales order. The name cannot be the same as any sales order that currently exists in your Marketron database.
- **Product**—If the non-Marketron order file contains a product name, it will be listed here and will be transferred to the Marketron sales order.
- **Order Number**—(Donovan orders only) This field displays the order's unique Headline number or Power code.
- **Advertiser**—The current advertiser is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing advertiser from your Marketron database, or click New to add a new advertiser to your Marketron database (see [2.3b Adding New](#))



[Advertisers/Agencies](#)). Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify an advertiser affiliation for all orders. The status LED is red until an advertiser affiliation is specified.

- **Agency**—The current agency (if any) is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing agency from your Marketron database, or click New to add a new agency to your Marketron database (see [2.3b Adding New Advertisers/Agencies](#)). Click the accompanying checkbox if you want the system to remember this affiliation in the future. If the advertiser is direct, this dropdown box will not be active.

NOTE: For non-direct advertisers, you are required to specify an agency affiliation. The agency status LED is red if you have chosen a non-direct advertiser but have not yet chosen an agency.

NOTE: If your station group uses advertiser associations, the Agency field will automatically display the value (if any) associated with the currently chosen advertiser.

- **Revenue Type**—The current revenue type is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing revenue type from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify a revenue type affiliation if you have chosen a status of Pending - Not Ready or Pending - Ready. When required, the revenue type status LED is red until a revenue type affiliation is specified.

NOTE: If your station group uses advertiser associations, the Revenue Type field will automatically display the value (if any) associated with the currently chosen advertiser.

- **Primary Competitive**—The current primary competitive code is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing competitive code from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify a primary competitive code affiliation if you have chosen a status of Pending - Not Ready or Pending - Ready. When required, the primary competitive status LED is red until a primary competitive affiliation is specified.

NOTE: If your station group uses advertiser associations, the Primary Competitive field will automatically display the value (if any) associated with the currently chosen advertiser.





- **Secondary Competitive**—(Optional) The current secondary competitive code (if any) is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing competitive code from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: If your station group uses advertiser associations, the Secondary Competitive field will automatically display the value (if any) associated with the currently chosen advertiser.

- **Billing Cycle**—The current billing cycle is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing billing cycle from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify a billing cycle affiliation if you have chosen a status of Pending - Not Ready or Pending - Ready. When required, the billing cycle status LED is red until a billing cycle affiliation is specified.

NOTE: If your station group uses advertiser associations, the Billing Cycle field will automatically display the value (if any) associated with the currently chosen advertiser.

- **SalesRep**—The current salesperson is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing salesperson from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify a salesperson affiliation for all orders. The salesperson status LED is red until a salesperson affiliation is specified.

- **Makegood**—The current makegood instruction is shown in the left column. Use the dropdown box in the Marketron Values column to choose an existing makegood instruction from your Marketron database. Click the accompanying checkbox if you want the system to remember this affiliation in the future.

NOTE: You must specify a makegood affiliation if you have chosen a status of Pending - Not Ready or Pending - Ready. When required, the makegood status LED is red until a makegood affiliation is specified.

NOTE: If your station group uses advertiser associations, the Makegood field will automatically display the value (if any) associated with the currently chosen advertiser.

- **Station**—All stations utilized on the non-Marketron order are listed here. For each order station, use the dropdown box in the Marketron Values column to set an affiliation with a Marketron station. If



you do not wish to set an affiliation for an order station, select Ignore Station; be aware, however, that schedule line data for that station will NOT be converted with the order.


If you associate one station from your Marketron database with multiple stations from the non-Marketron order, a popup message will alert you of this and ask if it is really what you want to do.



Click Yes to keep the affiliation, or click No to discard it.

NOTE: If the non-Marketron order file contains a buyer name or an estimate number, these values will not be shown in the EC conversion dialog, but they will be transferred to the Marketron sales order.

2.3a Saving Affiliations and Using Status Colors

-  When you select an affiliation and check the Save Affiliation checkbox, the system will remember the affiliation in the future and automatically select it when the non-Marketron order value is present.
- Saved Marketron affiliations will be indicated by a green status LED in the conversion dialog.

If a non-Marketron source value has no saved affiliation, the Marketron Values column will display the Marketron database value that is the closest alphabetical match (first three letters maximum), and the status LED will be yellow. If you then choose another value, the color will change to gray, which indicates the value is acceptable but is not a previous affiliation, close match, or default.

If your station group uses advertiser associations, only the Advertiser and Salesperson fields will automatically display the closest alphabetical match. All other fields will first display the associated value for the currently selected advertiser; if an association is not available for a field, the closest alphabetical match is displayed.

You can view a legend of status LED colors by going to Help>Legend.



- Red (Invalid Field)—The status LED is red if you have not specified a value for a required field.
- Yellow (Close Match)—The status LED is yellow if the system has located and displayed the closest alphabetical match to the value from the non-Marketron order.
- Green (Affiliated)—The status LED is green if the system has located and displayed a value that is a saved affiliation for the value from the non-Marketron order.
- Blue (Default)—The status LED is blue if the system has displayed the default value assigned to the affiliation category. For example, if you have specified that “Within Contract Dates” is the default makegood instruction for all orders, any order being converted will display this value with a blue status LED. Contact Marketron if you wish to set default values.

NOTE: Saved affiliations are specific to each user.

NOTE: EC allows you to affiliate one source value with more than one Marketron value. In this case, the last remembered affiliation will automatically be displayed the next time the source value appears in the non-Marketron order. An alternate affiliation can be chosen if necessary.

2.3b Adding New Advertisers/Agencies

If the advertiser or agency in the non-Marketron order does not exist in your Marketron database, it can be added by clicking the New button next to the Advertiser or Agency dropdown box. The New Advertiser or New Agency dialog box will appear.

NOTE: The New button will not appear unless you have the setting to allow users to add new advertisers and new agencies in Setup Editor (Settings>Advertisers tab) for your database.

New Advertisers

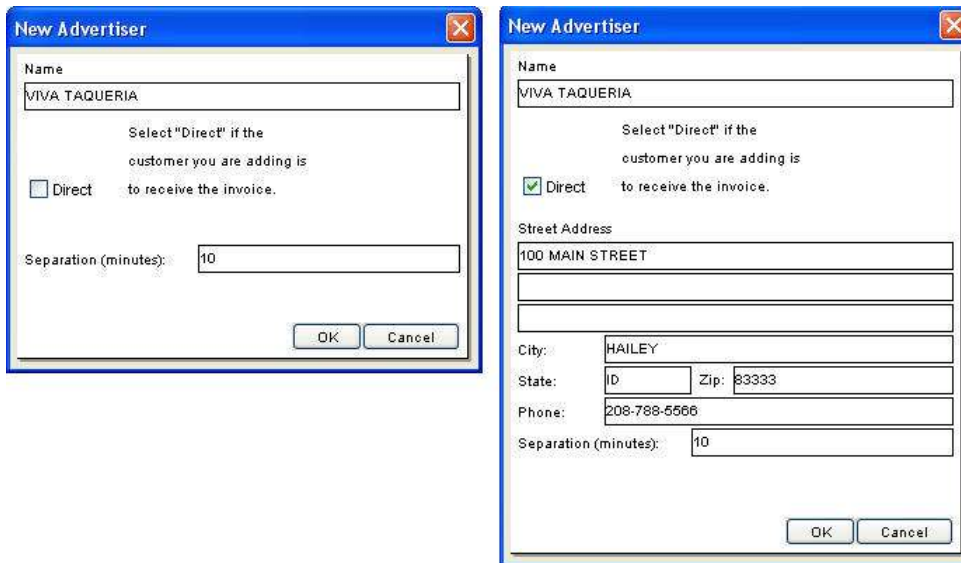
Enter the details of the new advertiser into the New Advertiser dialog box. If the advertiser is non-direct (uses an agency), all you need to complete is the Name field. If the advertiser is direct, click the Direct checkbox and then fill out the address, phone, tax schedule and separation information.

When finished, click OK. The New Advertiser dialog box will disappear, and the new advertiser name will be present in the Advertiser dropdown box on the main window.

NOTE: New advertisers or agencies must be approved in Setup Editor by the appropriate person (usually the business manager) before any business involving that client can proceed through the Marketron system. Contact your business manager for more information.

New Agencies

Enter the details of the new agency into the New Agency dialog box. You will need to complete all fields.



The image displays two screenshots of the 'New Advertiser' dialog box. The left screenshot shows the 'Name' field filled with 'VIVA TAQUERIA'. Below the name field, there is a checkbox labeled 'Direct' which is currently unchecked. A note reads: 'Select "Direct" if the customer you are adding is to receive the invoice.' Below this, the 'Separation (minutes)' field is set to '10'. At the bottom are 'OK' and 'Cancel' buttons. The right screenshot shows the same dialog box but with the 'Direct' checkbox checked. The 'Street Address' field is filled with '100 MAIN STREET'. The 'City' field is filled with 'HAILEY'. The 'State' field is filled with 'ID' and the 'Zip' field is filled with '83333'. The 'Phone' field is filled with '208-788-5566'. The 'Separation (minutes)' field is still set to '10'. At the bottom are 'OK' and 'Cancel' buttons.

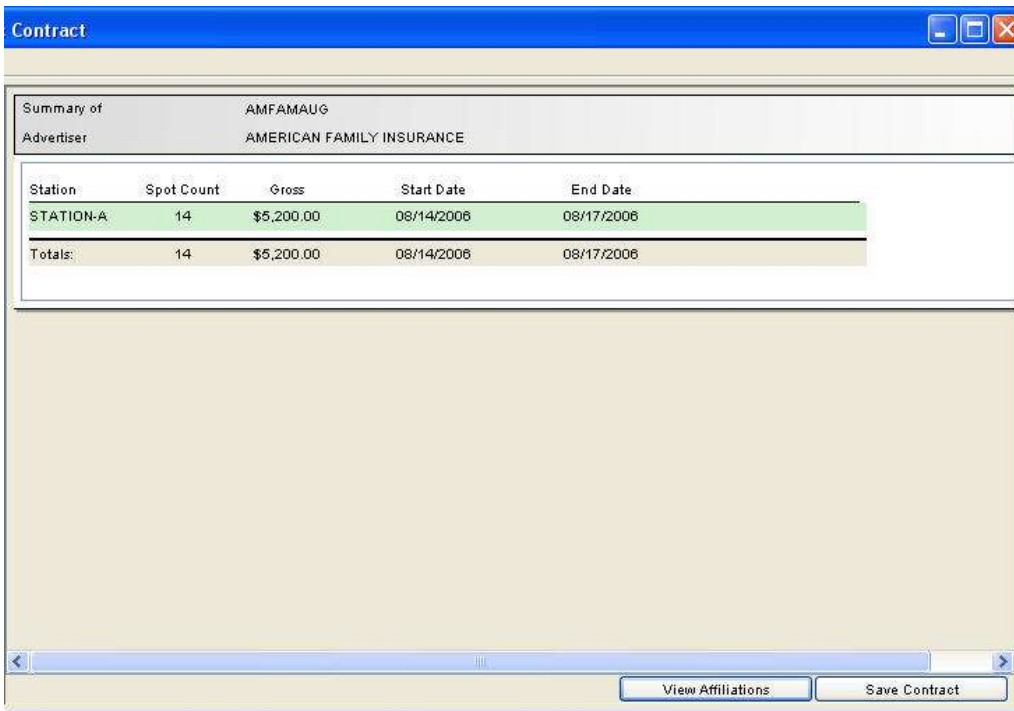


When finished, click OK. The New Agency dialog box will disappear, and the new agency name will be present in the Agency dropdown box on the main window.

NOTE: New advertisers or agencies must be approved in Setup Editor by the appropriate person (usually the business manager) before any business involving that client can proceed through the Marketron system. Contact your business manager for more information.

2.4 View a Summary (Optional)

You can view a spot/price/date summary of the prospective sales order by clicking the View Summary button in the bottom-right corner of the window. The conversion dialog will then be replaced by a summary of the sales order that you are about to save.



Contract

Summary of	AMFAMAUG			
Advertiser	AMERICAN FAMILY INSURANCE			
Station	Spot Count	Gross	Start Date	End Date
STATION-A	14	\$5,200.00	08/14/2006	08/17/2006
Totals:	14	\$5,200.00	08/14/2006	08/17/2006

View Affiliations Save Contract

To bring back the conversion dialog, click the View Affiliations button.

2.5 Save the Sales Order

After specifying all the required conversion affiliations, you can save the sales order into your Marketron database by clicking the Save Sales Order button in the bottom-right of the window. The saved sales order can be viewed on the Sales Order Details tab of Document Manager. You will need to refresh Document Manager if it was open during the conversion process.

You can now start over at step 2.1 to convert another non-Marketron order.

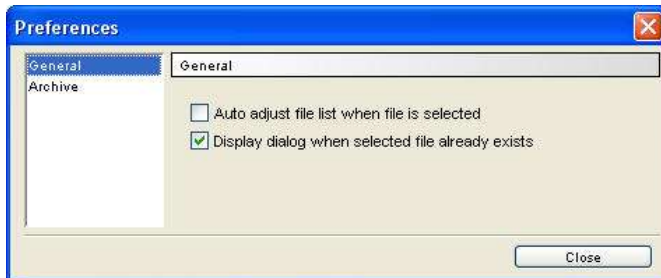
NOTE: If you save the sales order but cannot find it on Document Manager's Sales Order Details tab, you might have Document Manager set to hide Work In Progress and Pending-Not Ready orders. Go to Tools>Options in Document Manager to check these settings and turn them off if necessary.

Part 3: Customizing EC

You can customize the EC application by going to Preferences>Options. The left side of the Options dialog box displays two options groups.

3.1 General Options Group

Click General to view the General options group, which contains the following options:



- **Auto adjust file list when file is selected**—Select this option to have the system automatically shrink the non-Marketron order file list on the left side of the Marketron Electronic Contract window when you select a file. This allows the conversion dialog box to occupy the entire window.
- **Display dialog when selected file already exists**—Select this option if you want to be prompted with a warning message if you select a non-Marketron order file that has already been converted to a Marketron sales order. This message will warn you that converting the file again will overwrite the previously saved sales order.

3.2 Archive Options Group

Click Archive to view the Archive options group, which contains the following options.



- **Archiving enabled**—Select this option if you want to be able to archive files that you have converted to sales orders. If archiving is enabled, you will be asked when exiting EC if you want to archive processed files. After a file is archived, it will no longer appear in EC's Processed Files box.

NOTE: If archiving is enabled and you also have the “Auto archive on exit” option selected, you will not be asked if you want to archive processed files.

- **Auto archive on exit**—If the “Archiving enabled” option is selected, you can choose this option to instruct the system to automatically archive processed files every time EC is closed.

Part 4: Version Information

You can view the version information for your copy of EC by going to Help>About.

