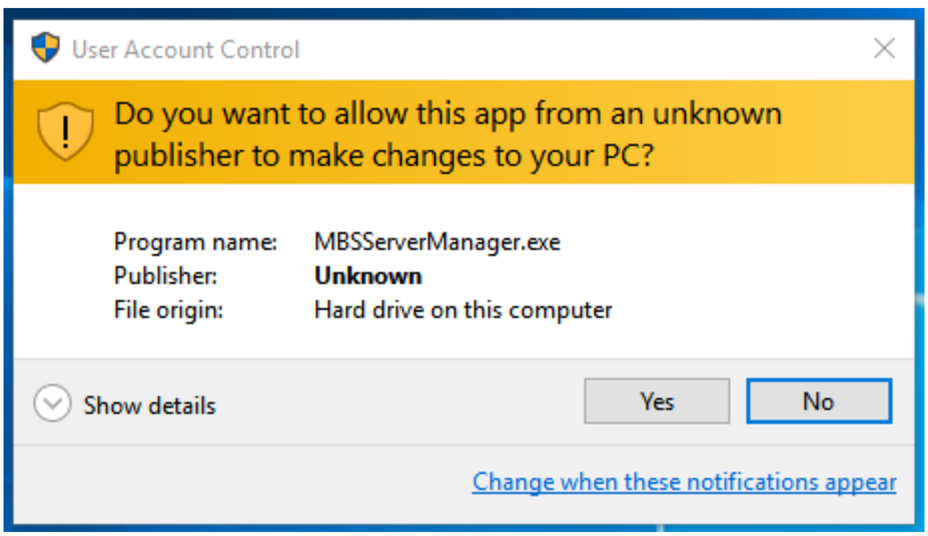
eInvoicing Lesson

Mapping Stations to the Exchange

NOTE – Prior to mapping your stations, you will need Administrative rights in Visual Traffic, and you will need your Exchange Credentials. If you are not sure of your credentials, contact support at help@marketron.com

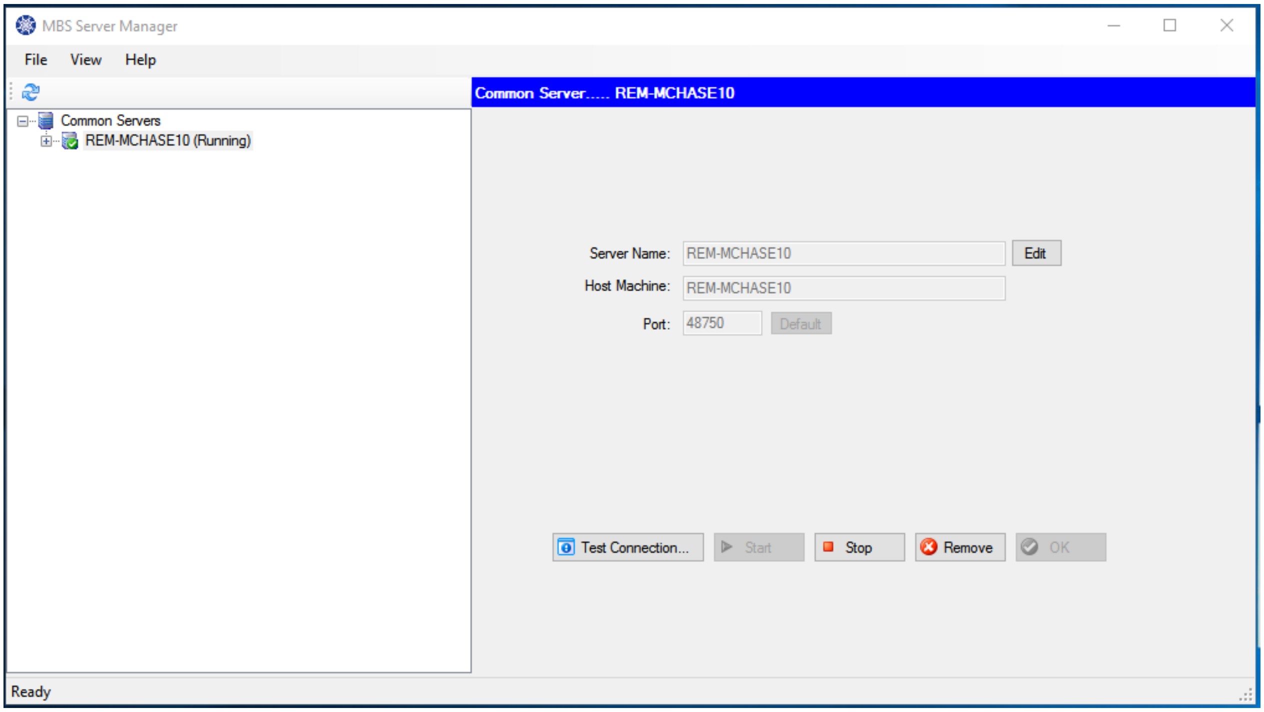
1. On the Visual Traffic Server, on the desktop, double click the MBS Common Server Manager icon.

2. If User Account Control is turned on, you may see this message box. Click "Yes" to proceed.



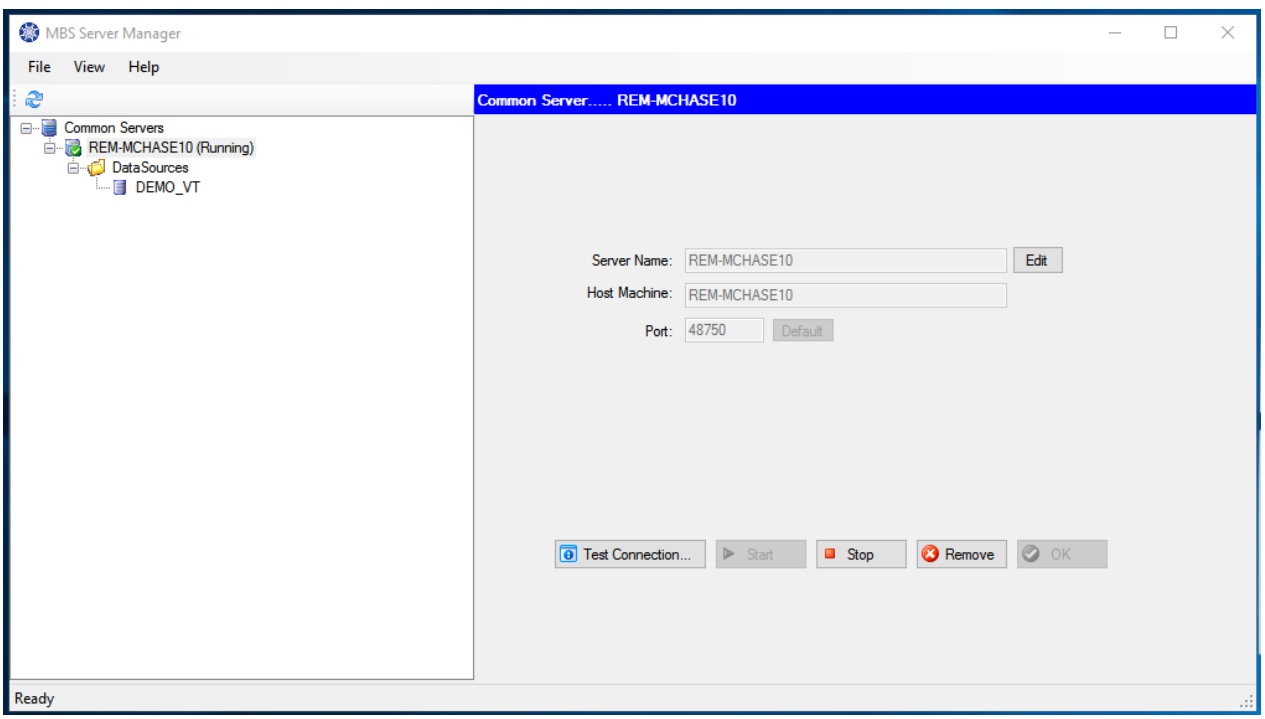
3. When the MBS Common Server opens, click the "+" underneath "Common Servers". The "Common Server" is your VT server name. This will expand your view.

Sample MBS Server Manager Screen



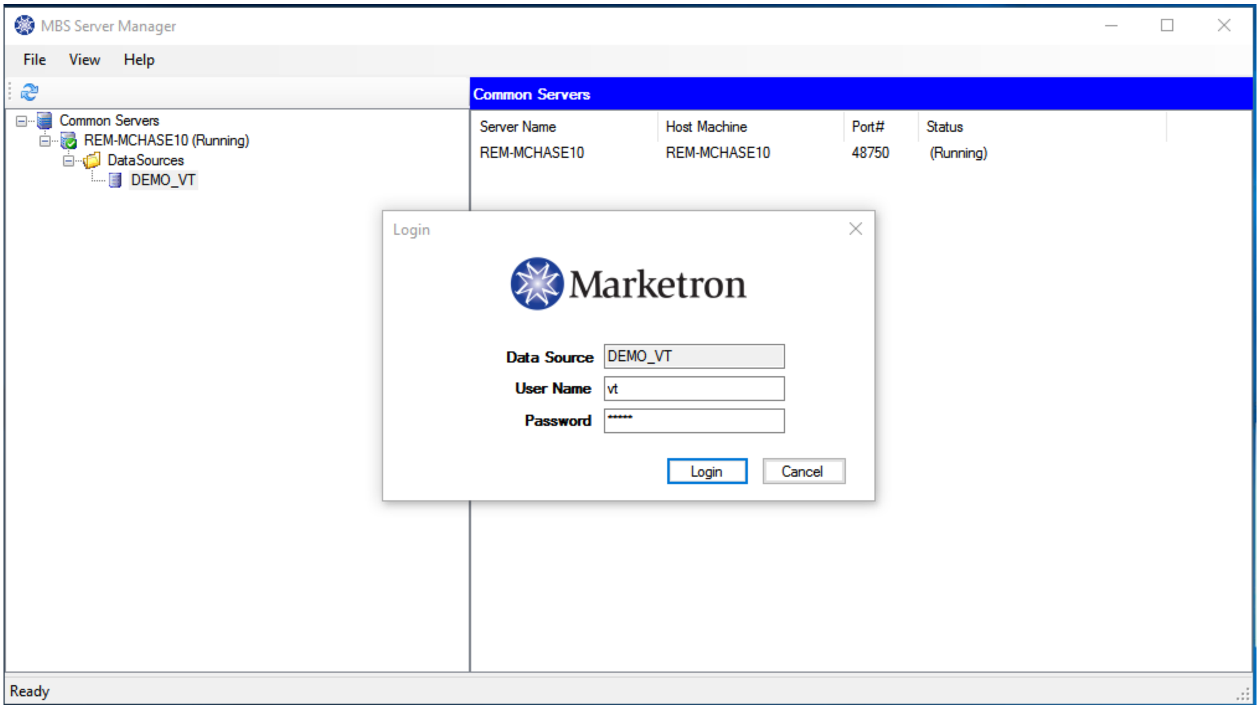
4. Click the "+" next to "DataSources".

Sample MBS Server Manager Screen



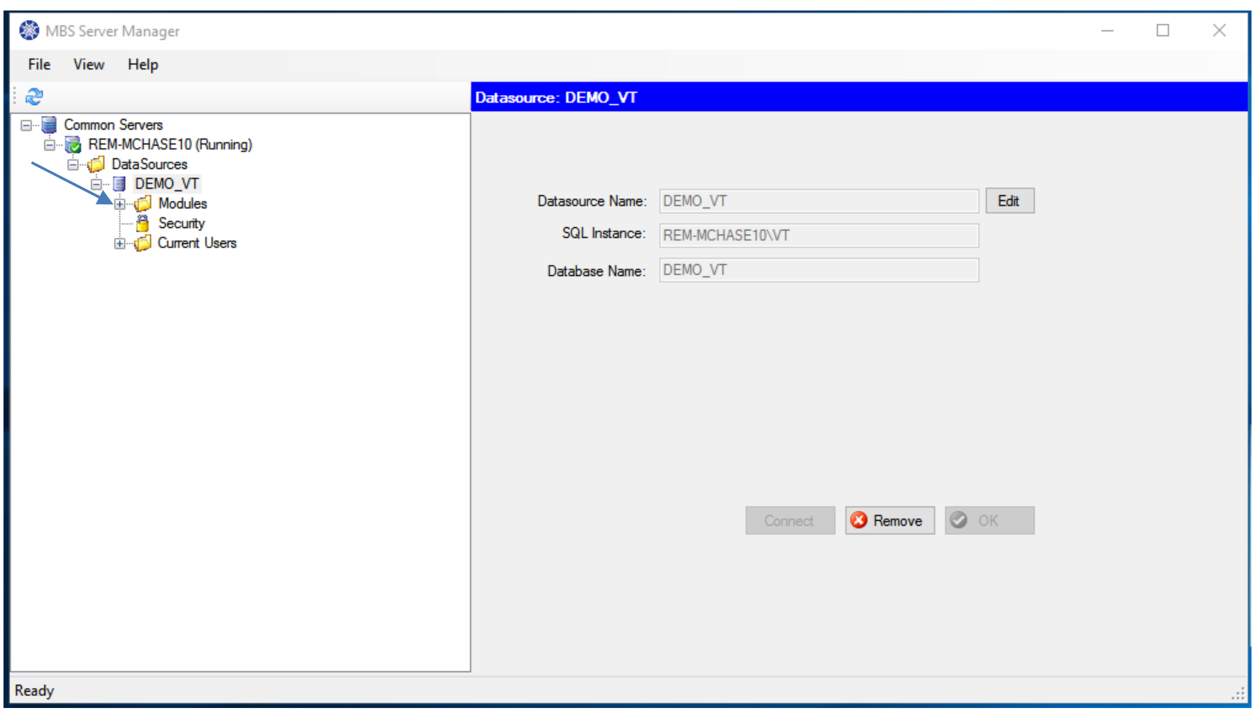
5. Click on your DataSource. This will usually be VT.

Sample DataSource Login Screen

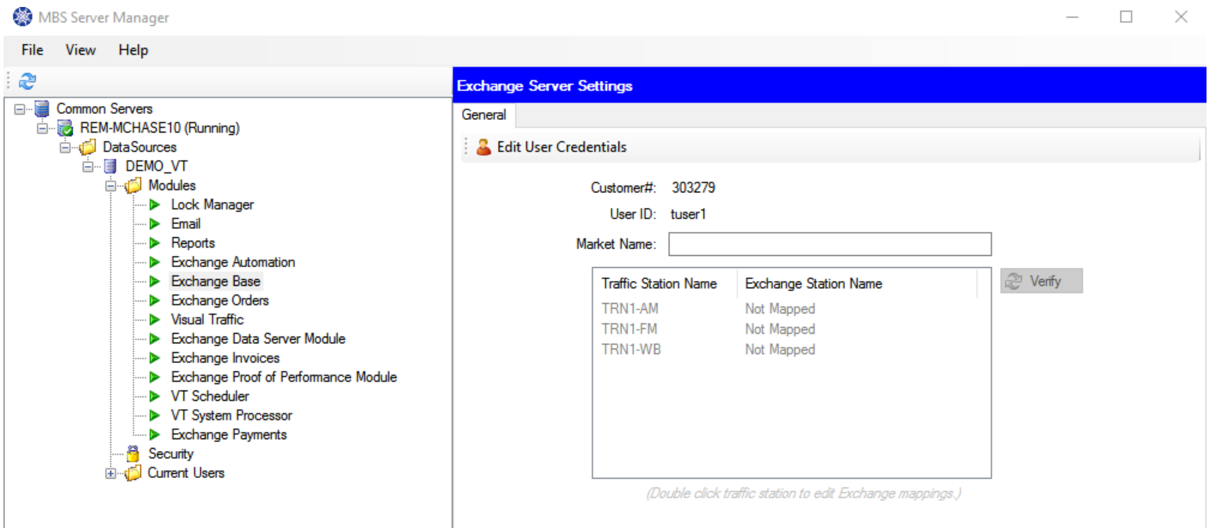


6. Log into the database – with your VT Username and Password. You must have VT administrator rights in order to map your stations.

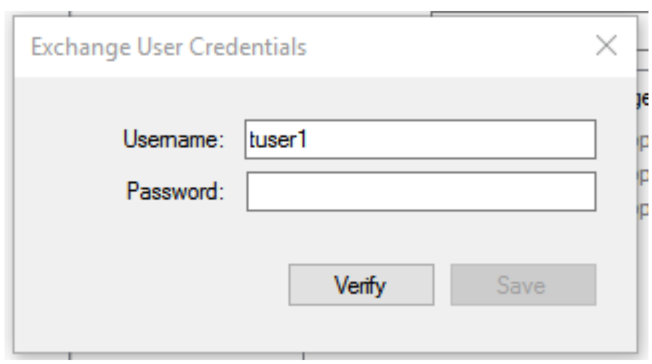
7. Once you are logged in, click the "+" next to Modules.



8. Click on "Exchange Base". Your stations will be listed to the right and they will likely show as "Not Mapped."

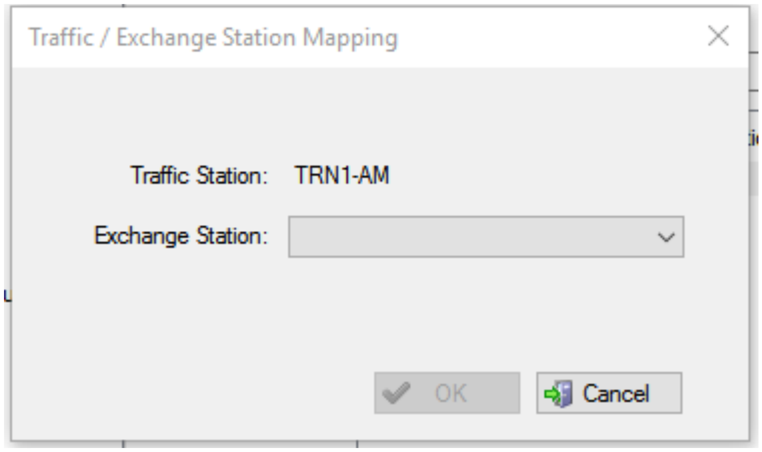


9. To map the stations, you must first enter your Exchange Credentials. Click the Edit User Credentials, which is located above the station list.

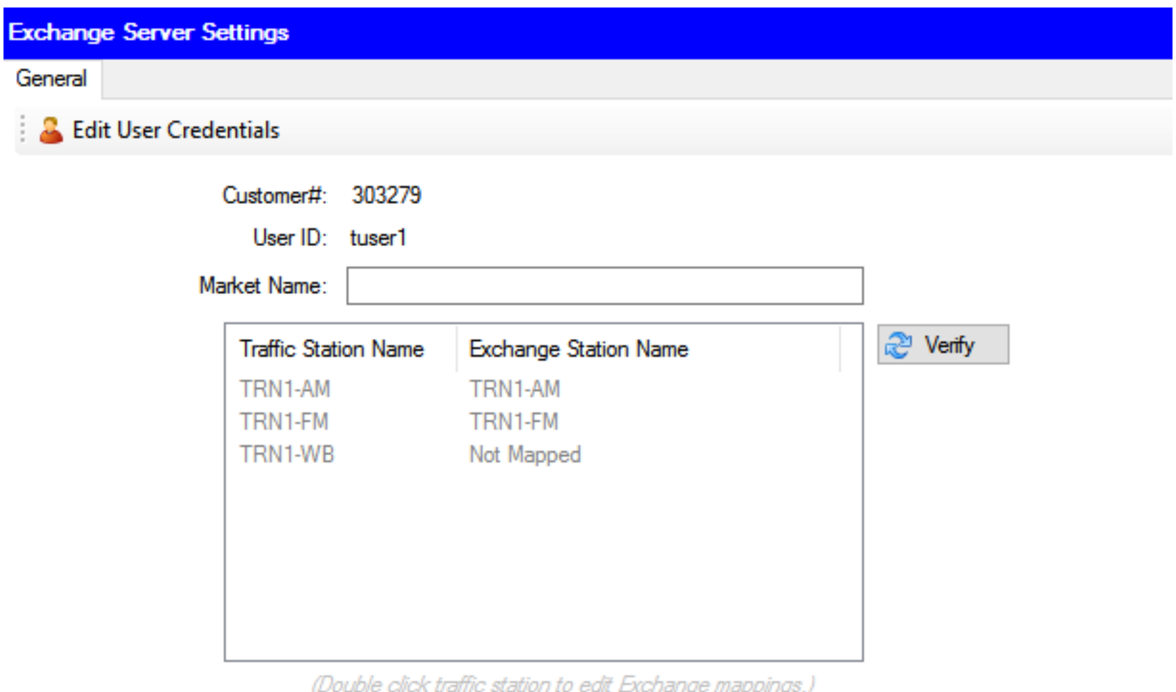


10. Enter your Exchange Username and Password, and then click "Save". If your credentials are not valid, you will need to re-enter the username and password.

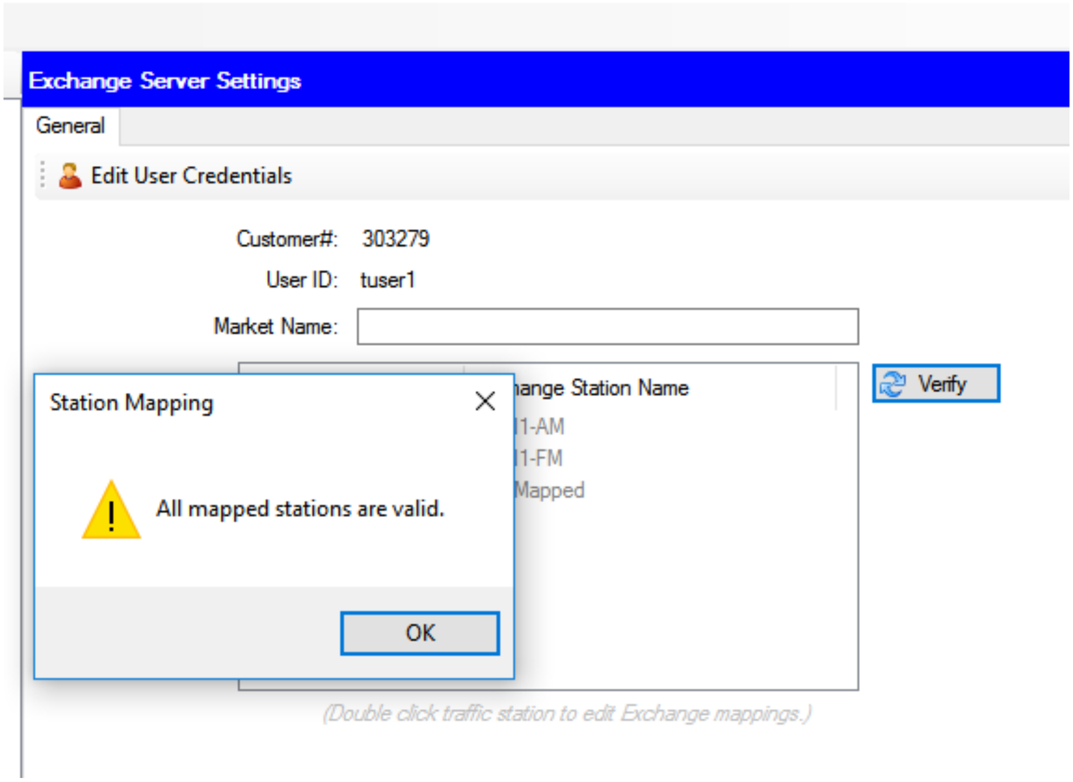
11. After your credentials have been validated, double-click the station you wish to map first.



12. Click the drop-down arrow and select your station. In most cases, the call letters will match. Continue doing this until all stations using eInvoicing have been mapped.



13. After mapping your stations, click the "Verify" button that is to the right of the station.



14. Once all of the mapped stations are valid, you have completed the mapping of your stations. Close your MBS Server Manager.

Setting up Notaries and Station Officials

With eInvoicing in VT 5 and above, you have the ability to send notarized affidavits and Co-op Scripts.

You will need a .jpg or .png of your notary stamp. *This image must have a width of 190 pixels.* You may resize your image using Windows Paint. When resizing, you will want to use the default height so that the image ratio is correct. If you will be uploading an image of your notary signature, *this will also need to have a width of 190 pixels.*

Setting Up Notaries

1. To set up your Notary and Station Official, you must log on to the Advertising Portal. The website is: **advertisingportal.emarketron.com**.
2. Click on "Station".
3. Log on to the Traffic Portal with your MyMarketron User name and Password.
4. Click on "eInvoices" near the top left of the screen.
5. Click on "eInvoice Notary Setup".

6. Click “Add Notary”.
7. Type in the Notary Name and their email address. Once the notary is set up, a password will be emailed to this address.
8. Enter the date the Notary Commission expires. You can click in the box – which brings up a calendar, or just key in the date.
9. Notary Signature (Text) – You have the option to type in the notary name, and it will appear in a script font on the eInvoices.

Or –

10. Notary Signature (Image) – You have the option of uploading a .jpg or .png image of the notary signature. Remember, this image should be 190 pixels wide. Click “Choose File” if you wish to upload an image. Navigate to the file and select it, then click “Open”.
11. Notary Message - If your state requires specific verbiage in the Notary Message, be sure to make the changes in this box. To the right of the box, there is a Date Format Legend. This is so that you can change the appearance of your date in the Notary Message.
12. Notary Disclaimer – If your state requires specific verbiage in the Notary Disclaimer, be sure to make the changes in this box.
13. Notary Stamp Image – Click “Choose File” and navigate to the location of your notary stamp image. Select the image and then click “Open”.
14. Notary Date Source – This is the date that appears on the eInvoice. Do you want the date to be the Invoice date? Or the Transmission date?
15. Click “Save”. This processes your request, and uploads any images. It also sends an email to your notary, with a password that they will need to use to authorize any eInvoices that need notarization. Then click “OK”.
16. Click “Back to List”.

Setting Up Station Officials

1. Click “Add Company Official”.
2. Company Official Name – Type in the name of your company official.
3. Company Official Signature (Text) – You have the option to type in the company official name and it will appear in a script font on the eInvoices.

Or –

4. Company Official Signature (Image) – You have the option of uploading a .jpg or .png image of the company official signature. This image should be 190pixels wide. Click “Choose File” if you wish to upload an image. Navigate to the file and select it, then click “Open”.
5. Invoice Message – This is the message that will appear on all notarized Invoices. You may adjust it to meet your needs.
6. Co-op Script Message – This is the message that will appear on all co-op scripts. You may adjust it to meet your needs.

7. Click “Save”.

8. Click “Back to List”.

NOTE: You may add more than one notary or station official name to your company, and select which name you wish to use at the time of invoicing.

NOTE: If your notary forgets their password, and you are set up as the Company Administrator for MyMarketron, you can reset their password. Come back into the Traffic Portal> eInvoices> eInvoice Notary Setup. Click on the Notary Name and the click “Reset Password”. The new password will be emailed to your notary.

NOTE: If you are attached to more than one company, at the top of the Traffic Portal screen, make sure to select your other companies and set up notaries and station officials for those companies as well.

Adding Logos to PDF Invoices

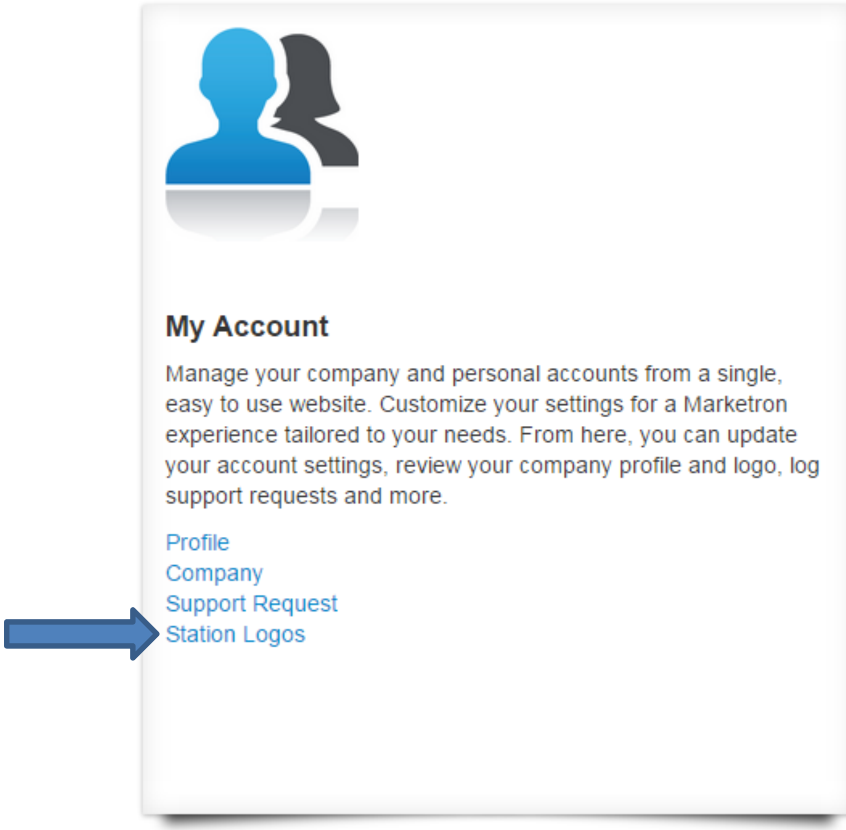
You can add your corporate and/or station-specific logos through your MyMarketron account. Use the Logos page to upload company and station specific logos to be used with eInvoices.

Your logos should be in a .png format, and have an aspect ratio of 3:2. In other words, 300 pixels wide by 200 pixels high.

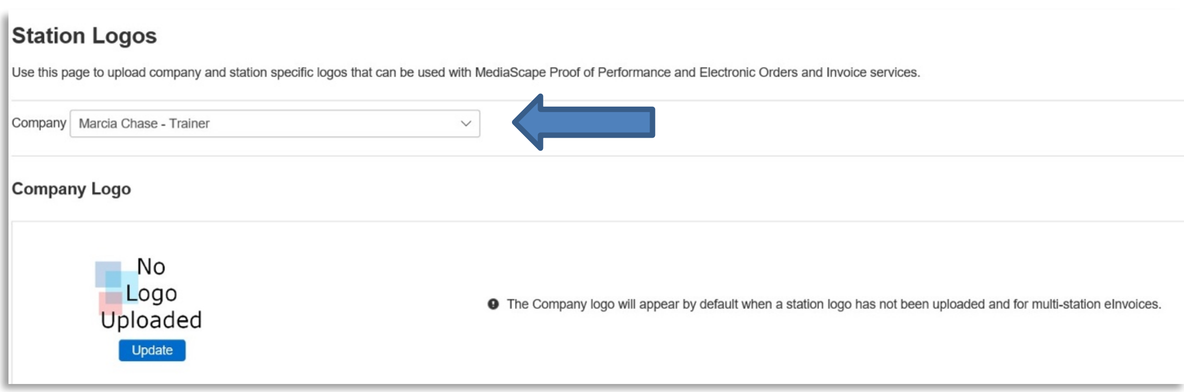
To add your logo in MyMarketron, complete the following instructions:

1. Go to **www.mymarketron.com** and enter your logon credentials.

2. On the opening page, under My Account, click Station Logos.



Sample MyMarketron Station Logos

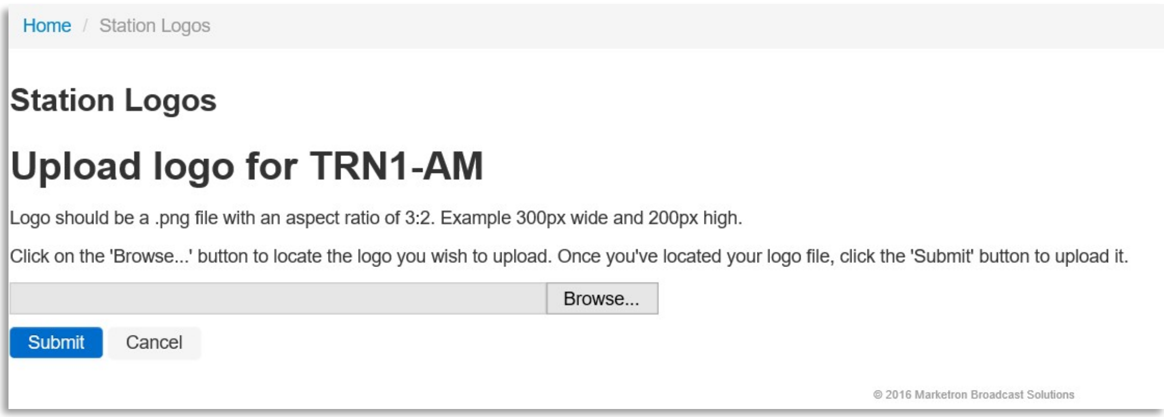


3. Make sure that you have selected the correct company if your user is attached to more than one company.

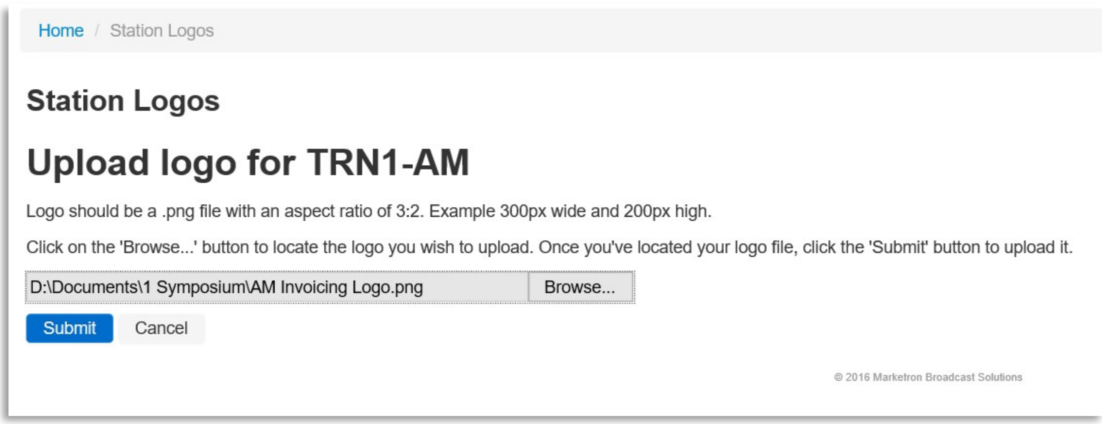
4. If you upload a logo to the “Company Logo”, the logo is then placed under the Company Logo heading and will propagate to all of your stations as a default.

5. In Station **Logos**, click on the **Update** button and browse to your logo file.

Sample MyMarketron Logo Upload Tab



6. Choose your logo file and click on the **Submit** button.



Sample MyMarketron Logos Tab

7. Your station logo is then placed under your call letters in Station Logos.
8. Continue to update Station Logos for each station at your site, and then if you are attached to other companies, complete those logos as well.
9. With this MyMarketron feature, you have the ability to change your logos at any time. You can update or delete a station logo, at which time the company/market logo will be used as default.

10. Because the company/market logo is used as the default in the absence of a station logo, you cannot delete the company/market logo from the station. To remove a company/market logo, you must delete it under the Company logo in the upper left portion of the page.

Visual Traffic Setup

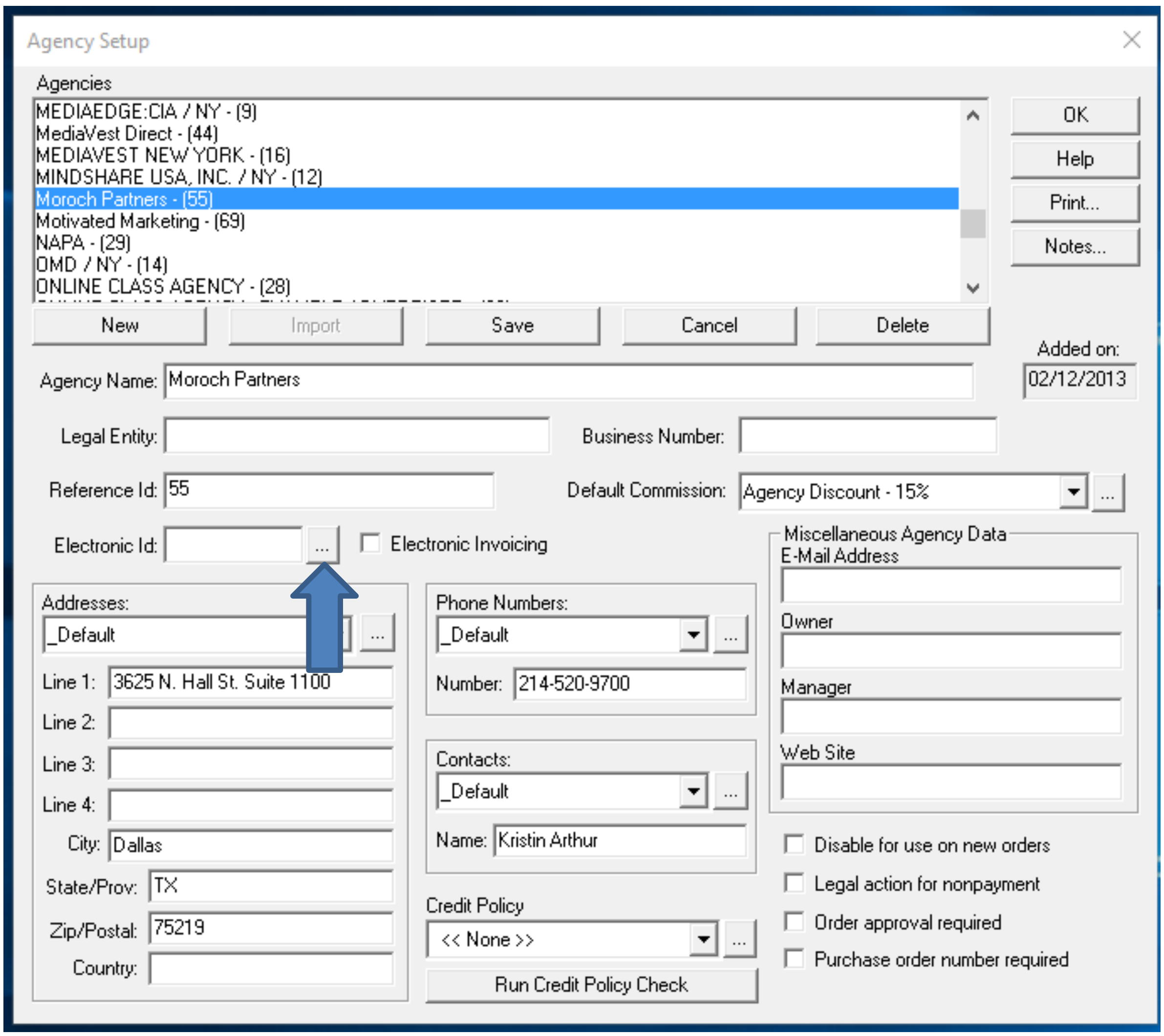
You have the ability to electronically send spot rate invoices in a PDF format through the Marketron Exchange to your agencies and direct clients automatically.

Setting Up Agencies for eInvoicing

Agencies That Already Receive eInvoices

1. Go to **VT Main Menu**>**Setup Menu**>**Edit Agency** and select Agency from the list.

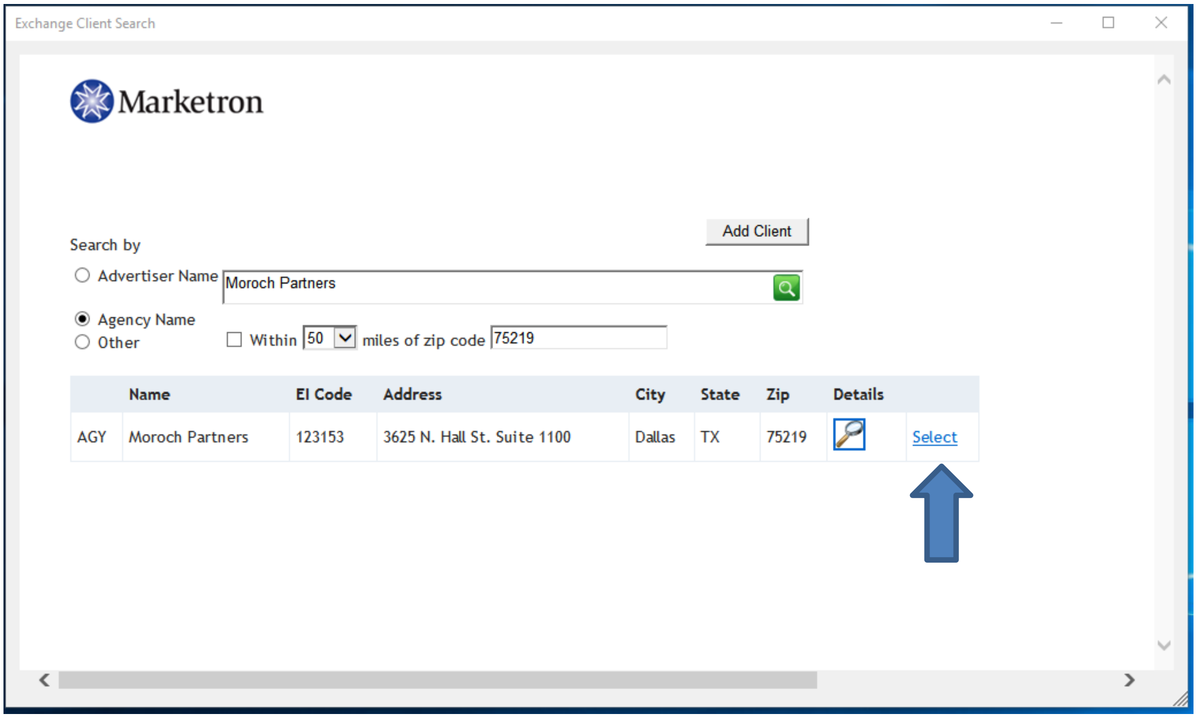
Sample Agency Setup Screen



2. Click on the ellipsis button next to the **Electronic ID** Field.

3. This opens up the Marketron Client Search screen.

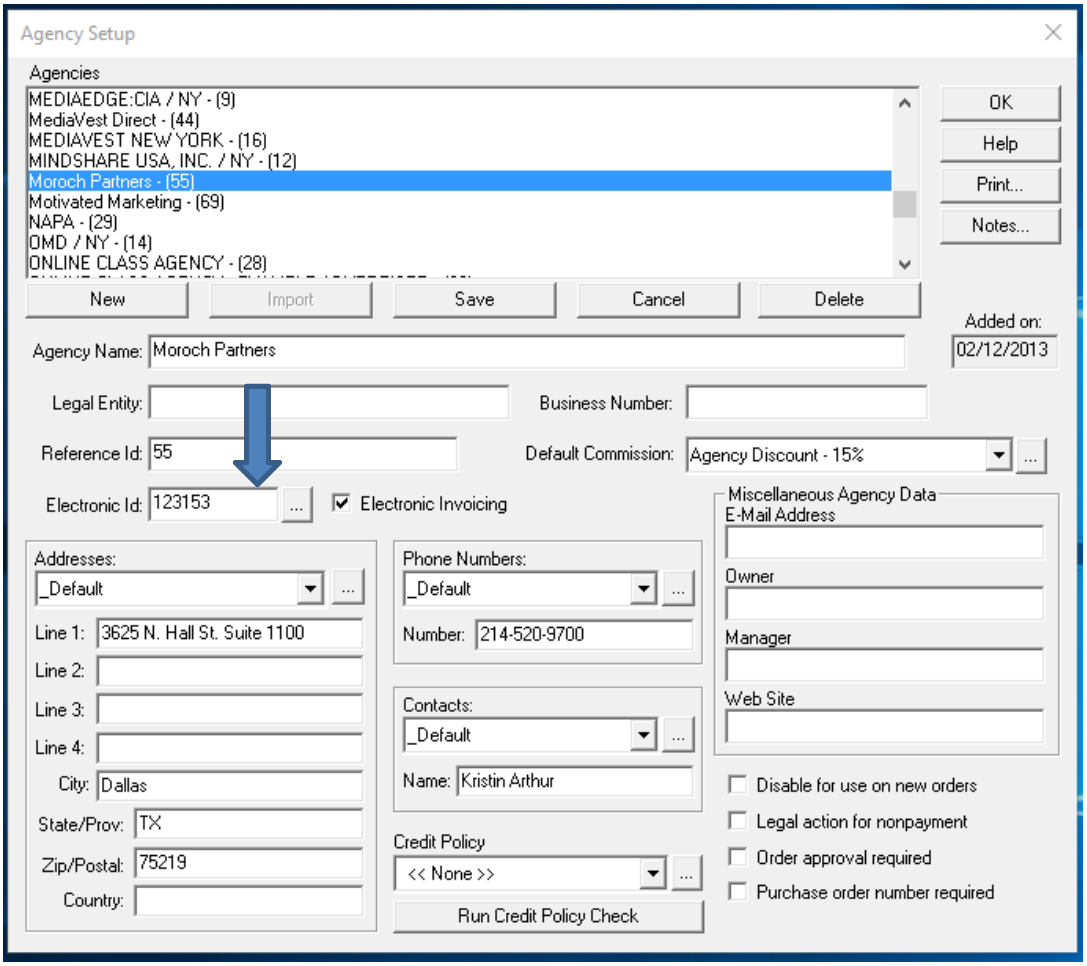
Sample Marketron Client Search Screen



4. Because you clicked on the ellipsis button while on an existing agency, the search will look for the selected agency. If the agency is not found, widen the search by removing a portion of the agency name.

5. Once the agency is found, check the details by clicking the magnifying glass. When you are certain that this is the correct agency, click on the **Select** link.

Sample Completed Agency Setup Screen

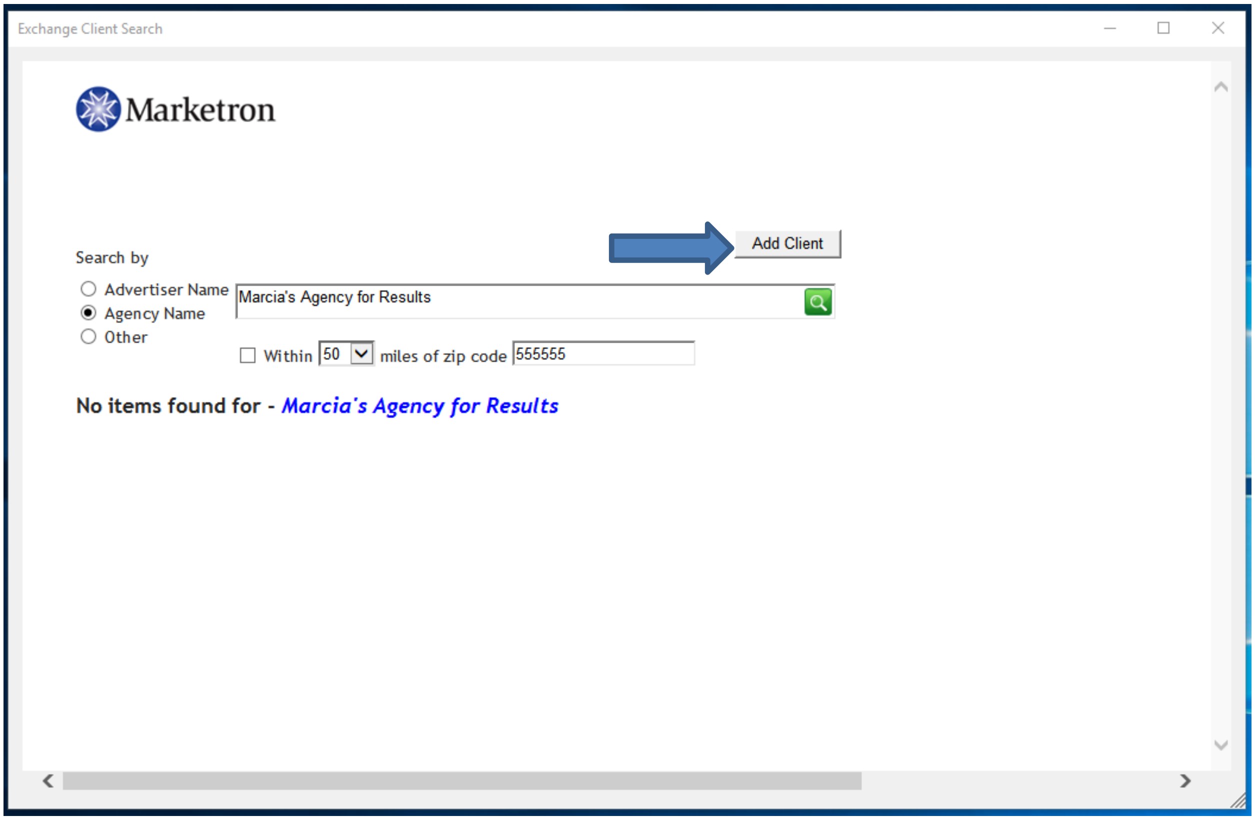


6. On the Agency Setup screen, select the **Electronic Invoicing** option by clicking the check box and then click on the **Save** button.

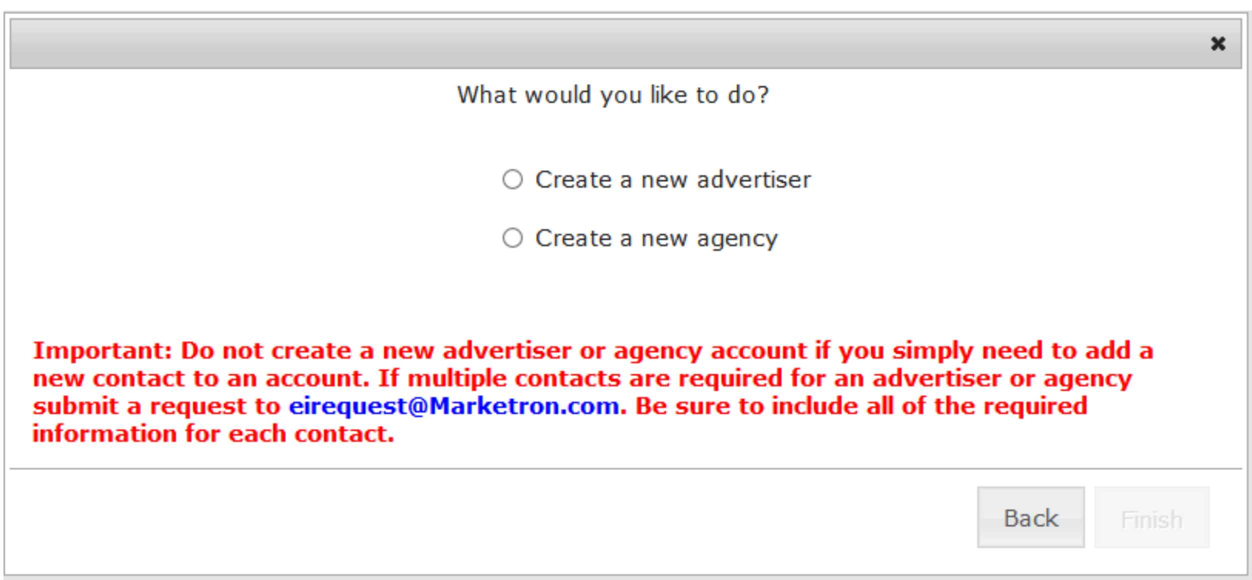
Adding New Agencies to the Exchange Client List for eInvoicing

1. If your agency does not display in the Marketron Client Search screen, click **Add Client**.

Sample Marketron Client Search Screen



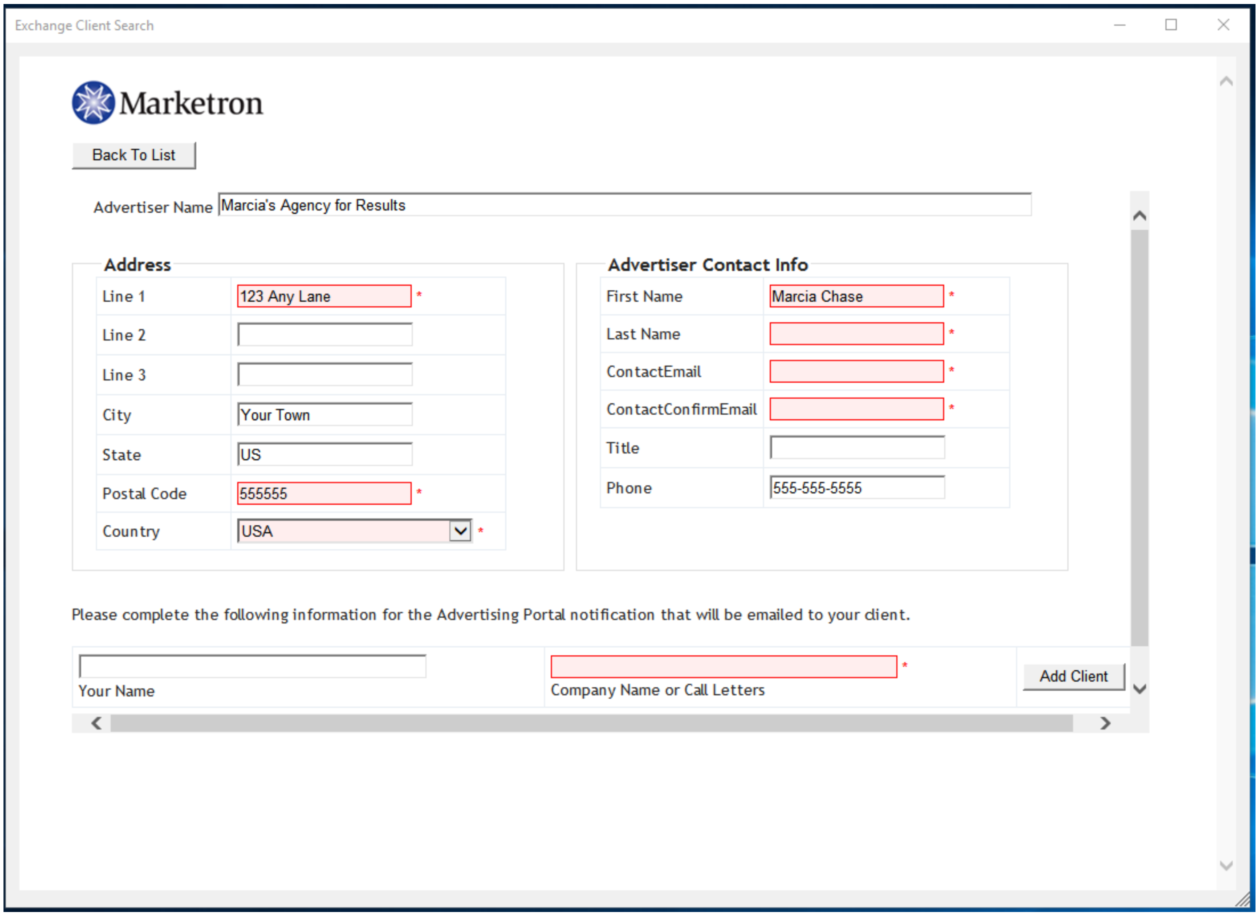
Sample Add New Client Selection Screen



13. Select **Create a new agency** and then click **Finish**.

14. All of the red boxes must contain information. You will need to make sure that the **First Name** box only has the first name of the contact, and the **Last Name** box will have the last name of the contact. Type in the email address of the contact in the ContactEmail box and then type it again in the **ContactConfirmEmail** box.

Sample Add Client Screen



15. Once the top boxes are filled in, fill in Your Name and your Company Name or Call Letters. Click the Add Client on the bottom right. This will add the Agency to the Exchange Client list. The agency will receive an email notification from the **Exchange Administration Manager**, giving them their login and password to the Marketron Advertising Portal. Agencies will be notified when they have Electronic Invoices available and they will be able to view/download them from the email notification as well as from the Advertising Portal. They will also be able to make changes to their invoice delivery options by logging in to the Advertising Portal.

16. If the email you have entered is a duplicate email, you will see the following screen:

Sample Duplicate Email Addresses Screen

Exchange Client Search

Duplicate Client Contacts

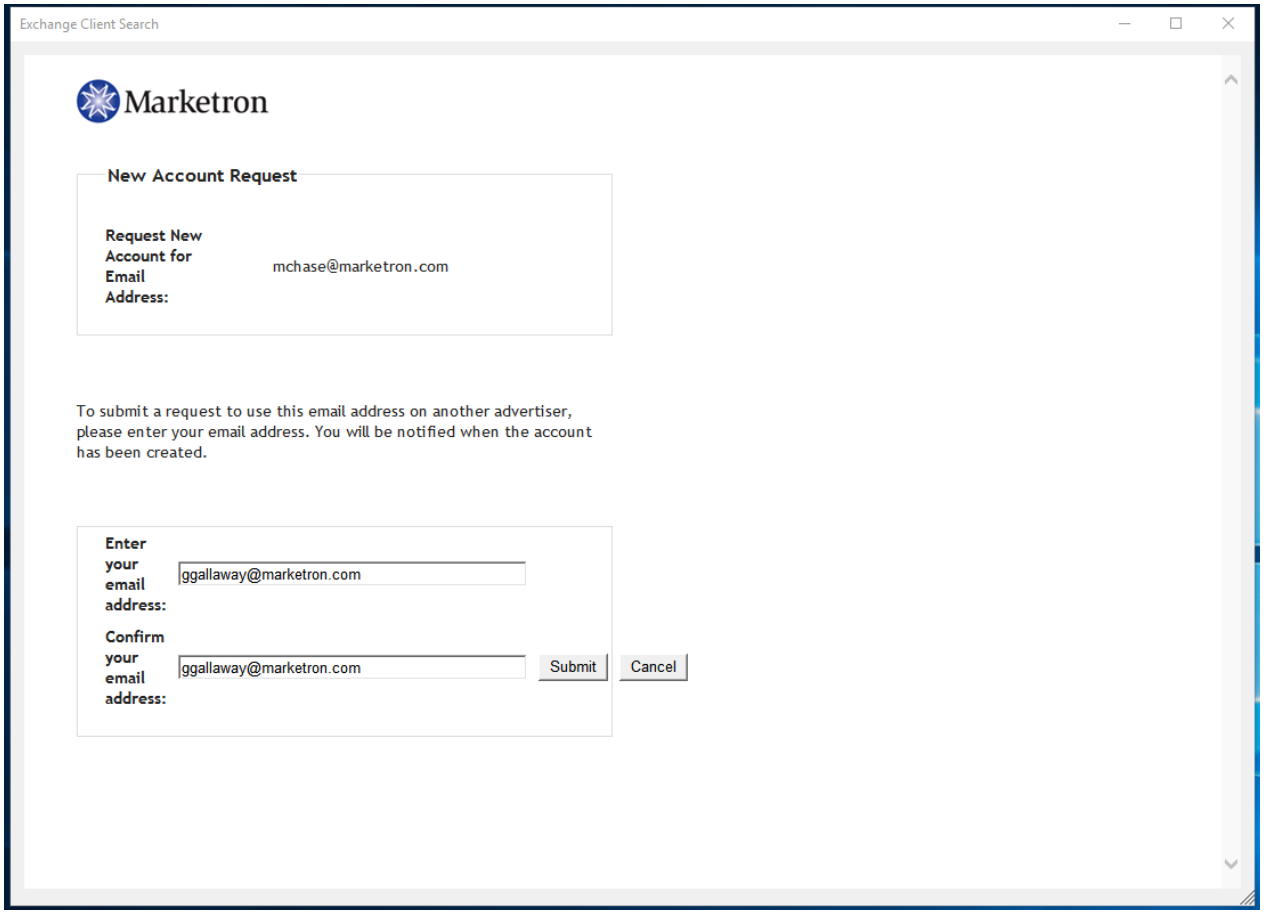
Name	Address-1	City	State>	Postal Code
ALABAMA FOOT CARE CENTER, P.C.	2304-B GATEWAY DR	OPELIKA	AL	36804
EXAMPLE BLUEBERRY	123 ANYWHERE LANE	ANYPLACE	AL	36801
Example Agency 3	510 Agency Place	Our Town	AL	12345
BALDWIN HOME CENTER	3736 S Phillips Dr	Lanett	AL	36863
AROMATHERAPY AND MASSAGE CENTER	1147-A OPELIKA RD	AUBURN	AL	36830
JIM BOB'S CHICKEN FINGERS	1006 1ST AVE	OPELIKA	AL	36801
LAMBERT TRANSFER & STORAGE	1102 FOX TRAIL	OPELIKA	AL	36801
ALLSTATE - DEE JONES	601 FIRST AVE	OPELIKA	AL	36801
AUBURN EYE CARE	1955 OPELIKA RD	AUBURN	AL	36830
DAVID' S HOUSE OF HORROR	456 SCARY LANE	SCARY TOWN	AL	12345
WAREHOUSE BISTRO	105 ROCKET AVE	OPELIKA	AL	36801
THOMAS PHARMACY	1713 PEPPERELL PKWY	OPELIKA	AL	36801
*** EXAMPLE NEW ADVERTISER	508 South 7th Street	Opelika	AL	36830
***EXAMPLE OF NEW ADVERTISER 2	123 ANYPLACE LANE	ANYWHERE	US	21351
H & W MOTORS	601 COLUMBUS PKWY	OPELIKA	AL	36801
VICTORY DESIGNS (TR)	817 S RAILROAD AVE	OPELIKA	AL	36801
CARE CENTER OF OPELIKA	1908 1/2 PEPPERELL PKWY	OPELIKA	AL	36801
PLANT WORLD NURSERY	7509 LEE RD 146	OPELIKA	AL	36801
Sample Advertiser	1234 ABC Street	My Town	AL	32156
DAIRY QUEEN*		Auburn	AL	

There are 20 advertisers with this same email address. Would you like to select one of these Advertisers?

17. You will be asked if you wish to select one of the listed advertisers. You would say yes, for instance, if you were adding a Trade advertiser for an advertiser that already is listed.

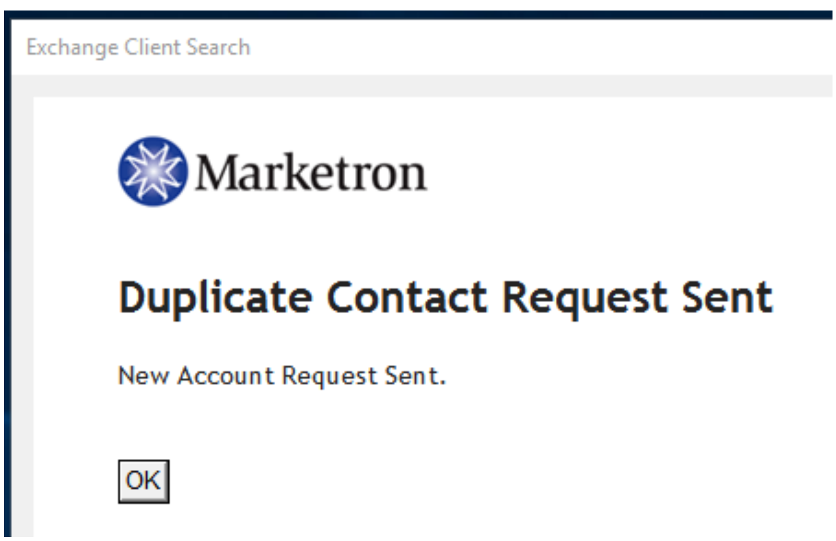
18. If you answer no, you will see the **New Account Request** screen. You would enter your email address so that you will be notified when the account has been created.

Sample New Account Request Screen



19. Once you click Submit, the **Duplicate Contact Request Sent** screen displays. Click OK

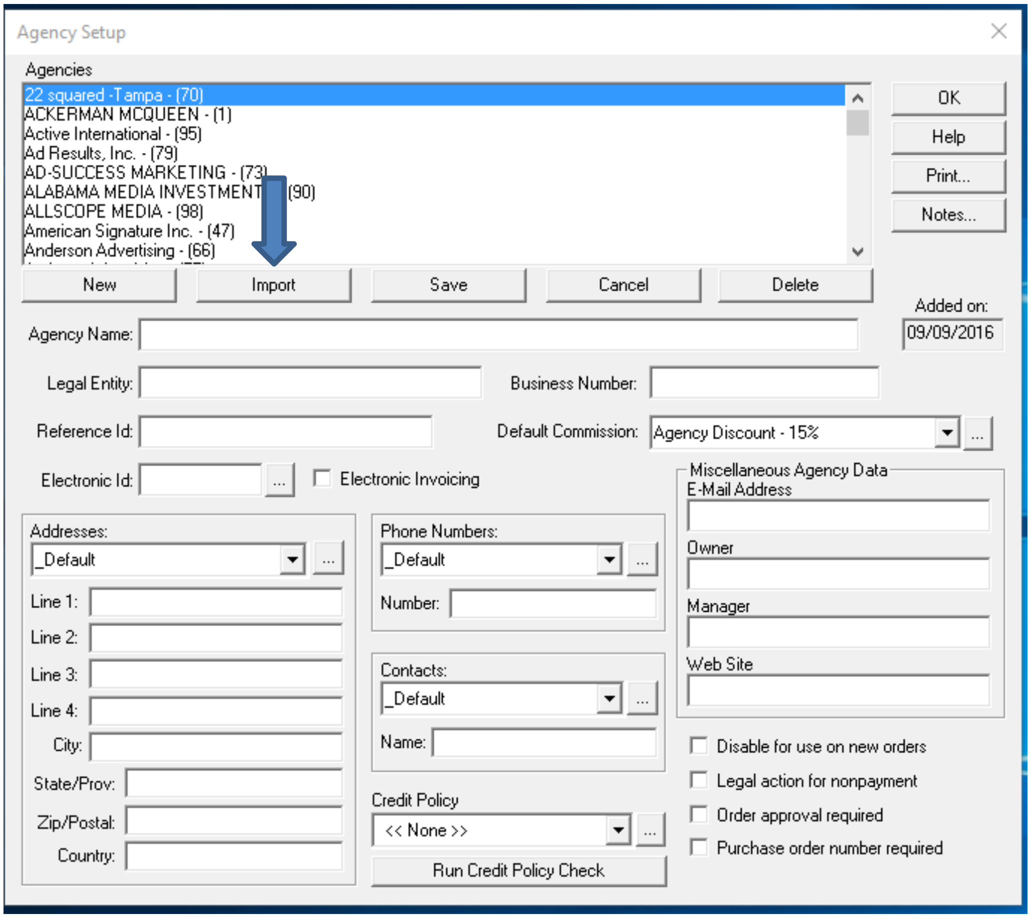
Sample Duplicate Contact Request Screen



Importing a New Agency from the Exchange Client List

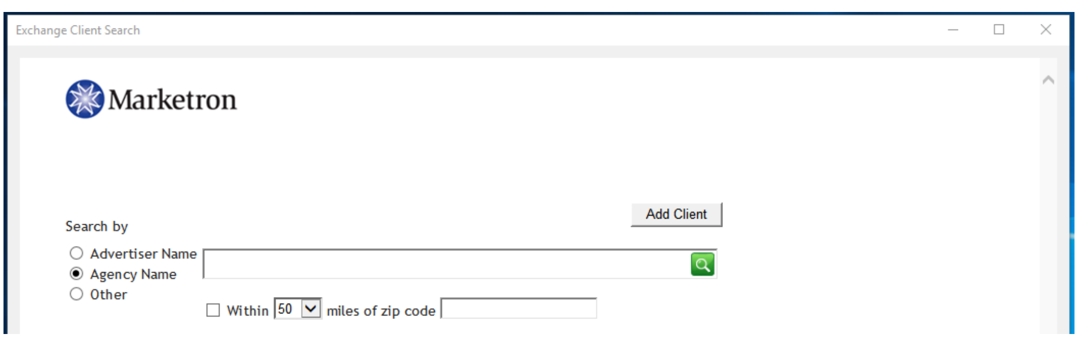
1. To set up a new Agency, from the main Visual Traffic menu, select **Setup>Edit Agencies**. Click on the **Import** button.

Sample Agency Setup Screen

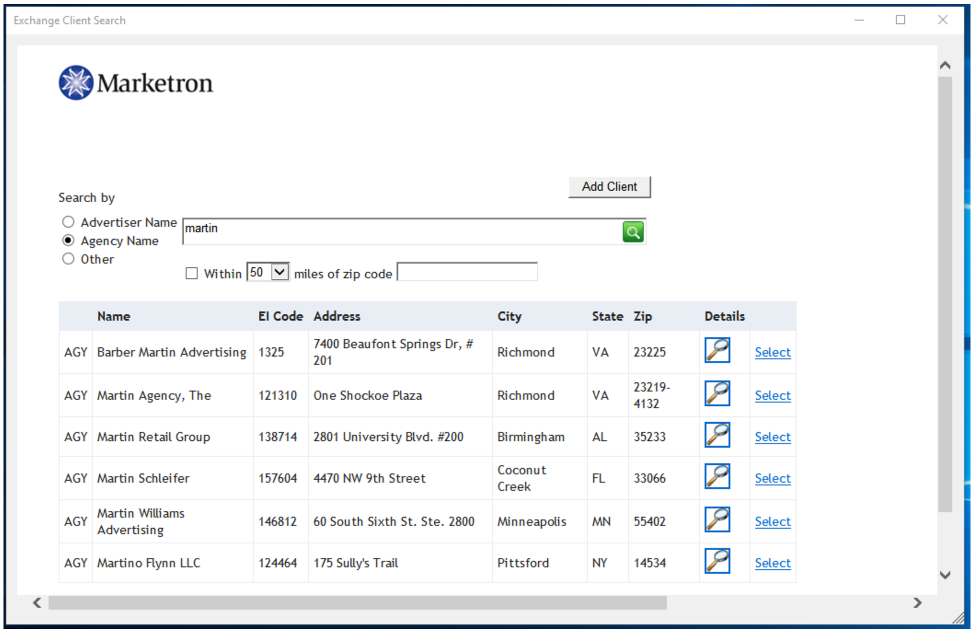


2. The Marketron Exchange Client Search screen opens.

Sample Marketron Exchange Client Search Screen

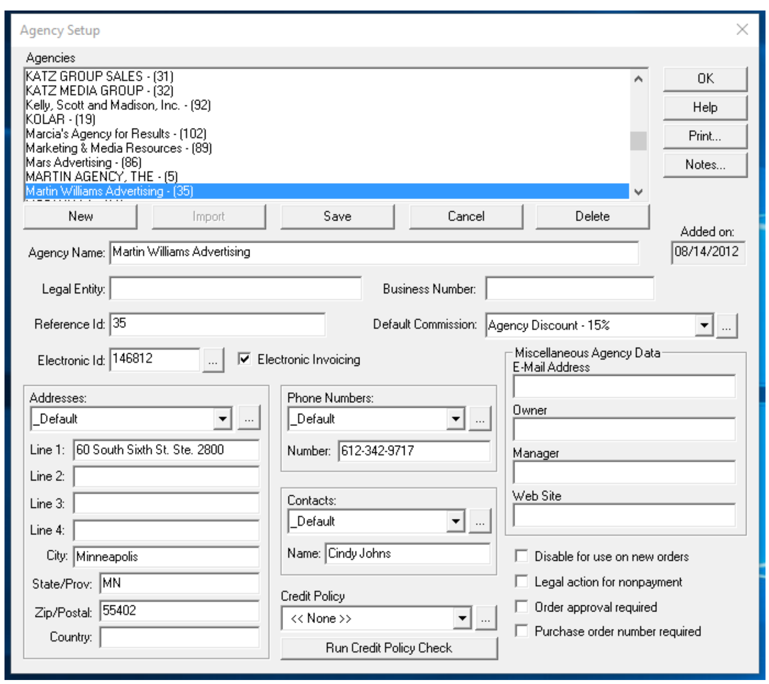


3. Make sure that the **Agency** option is selected in the **Search by** area and type in the name or a portion of the name of the new agency you wish to add to Visual Traffic. Click the green **Search** button.



4. If you see more than one agency listed, click the magnifying glass in the Details column to verify the agency you wish to import. Click on the **Select** link.

5. On the Agency Setup screen, all of the fields have been filled in, including the Electronic ID. Select the **Electronic Invoicing** option by clicking the check box, and then click on the **Save** button.

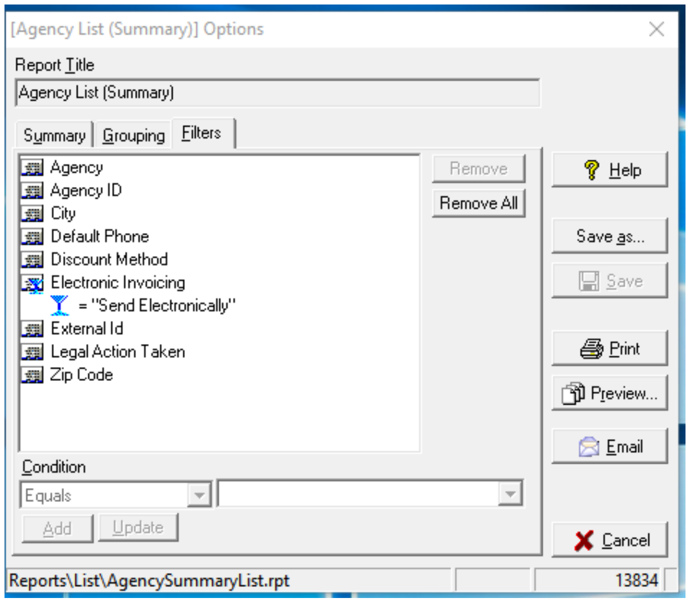


Setting Up Advertisers for eInvoicing

Existing Advertisers that have an Agency Attached

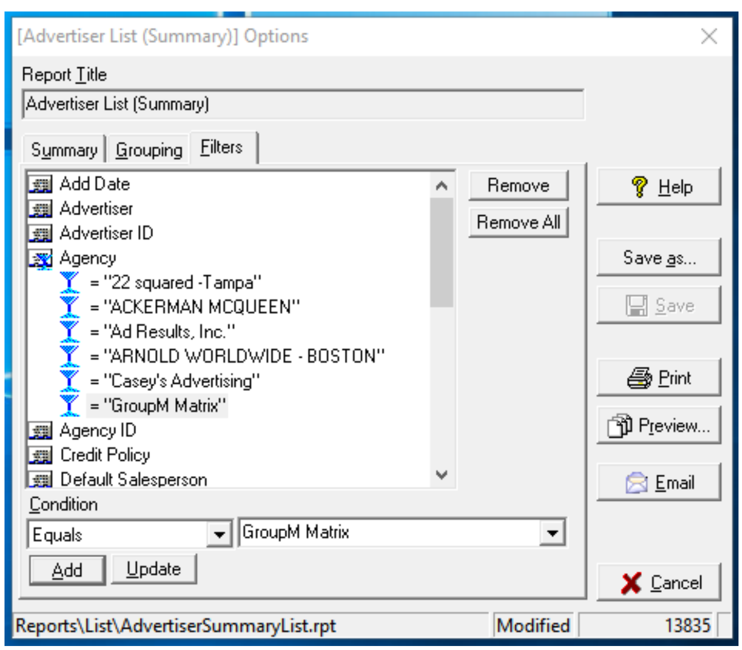
1. Print the **Agency List Summary report** from **Report Center>List>Agency List Summary**. Set your Filter for Electronic Invoicing to be "Equals: Send Electronically.

Sample Agency List (Summary) Options Screen



2. Print the Advertiser List Summary Report from **Report Center>List>Advertiser List Summary**. Filter by the Agencies on the Agency List Summary report you just printed. These are the non-direct Advertisers you will need to edit for Electronic Invoicing.

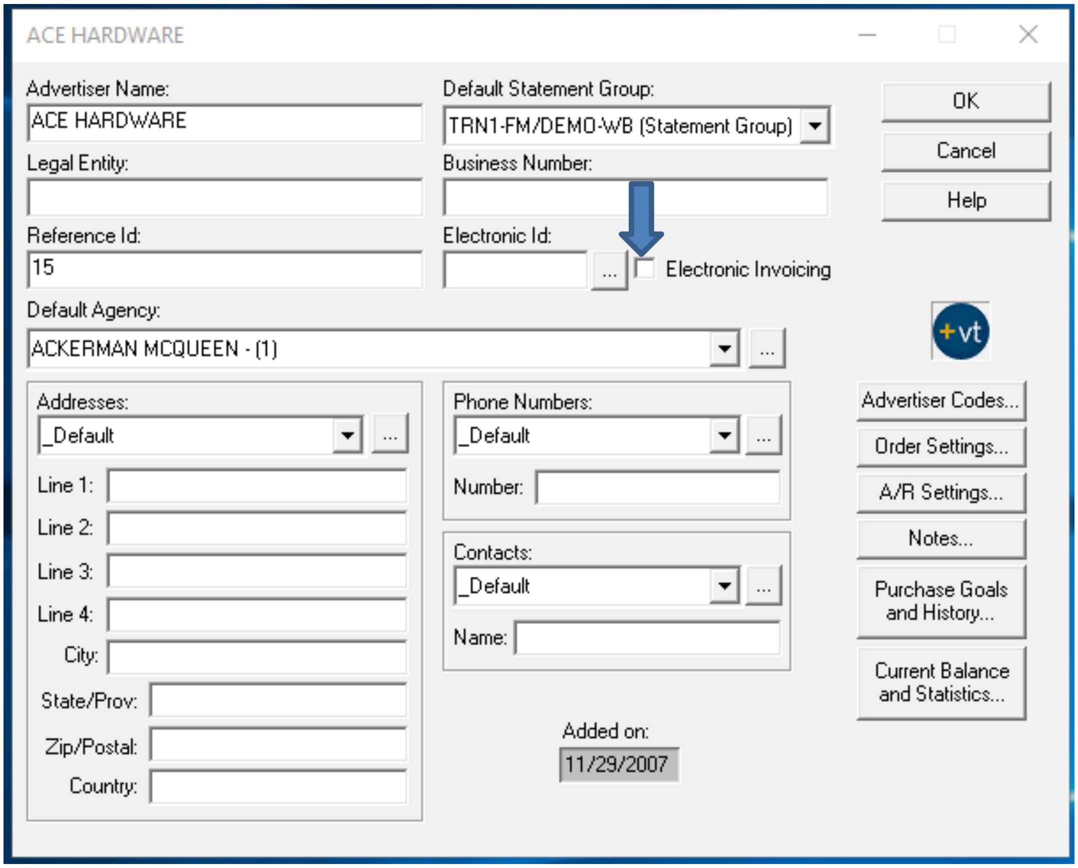
Sample Advertiser List (Summary) Options Screen



3. Go to **VT Main Menu>Advertiser**>**Edit Advertisers** and select the Advertiser from list. Click **Edit**.

4. Select the **Electronic Invoicing** option and click in the box. Because this is an agency client, you do not enter an Electronic ID number.

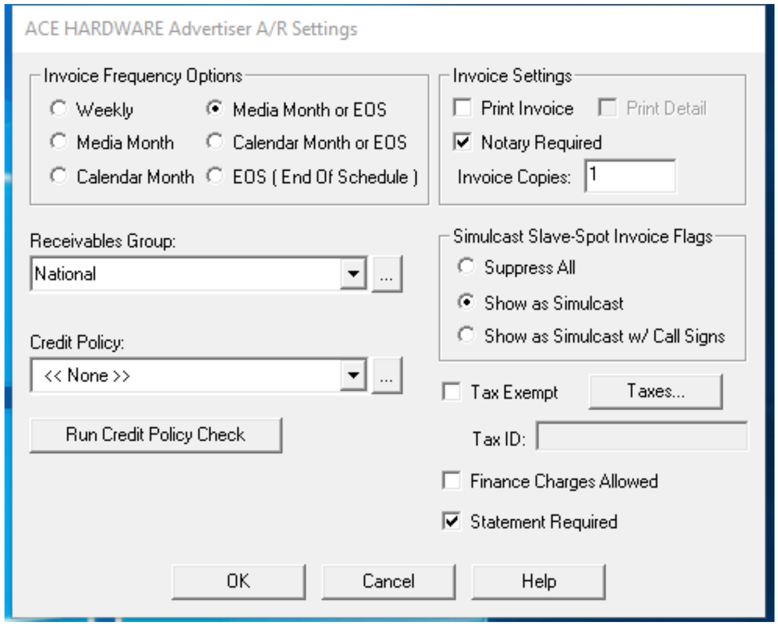
Sample Advertiser Entry Screen



5. In **A/R Settings**, if you do not wish to print an invoice for this client because it is being sent electronically, uncheck "Print Invoice".

6. If the invoice requires notarization, make sure to check the "Notary Required" box.

Sample A/R Settings Screen



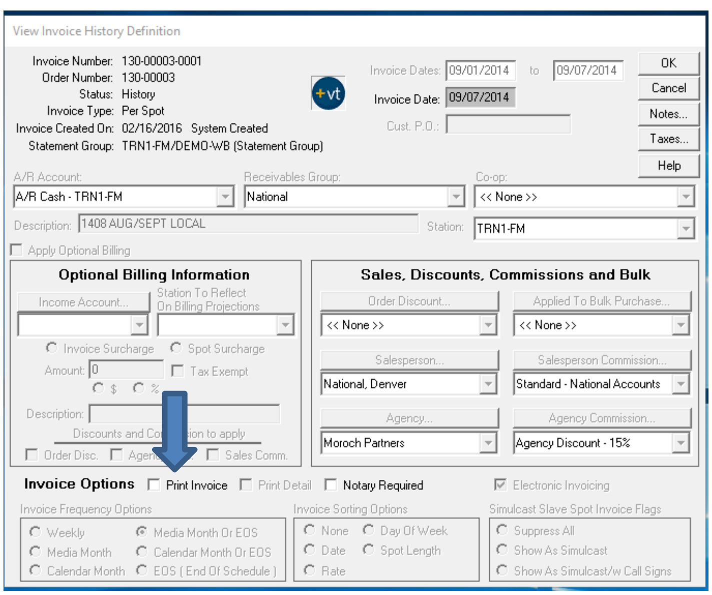
7. Click "OK" and then "OK" again to save the changes you have made to the advertiser.

NOTE: If you choose not to print your invoices for advertisers using eInvoicing, you are able to print a paper copy manually.

You will need to edit the invoice in **Billing> Edit/Create Invoices.** Display the advertiser, choose whether the invoice is Current or in History, single-click the invoice to select it and Edit (current) or View (History). Click "Edit Invoice" (current) or "View Invoice" (history) in the lower left corner.

At the **Invoice Options** portion of the invoice, near the bottom, you will need to check "Print Invoice" and then "Print Detail" in order to print dates and times on the invoice.

Sample View Invoice History Definition Screen



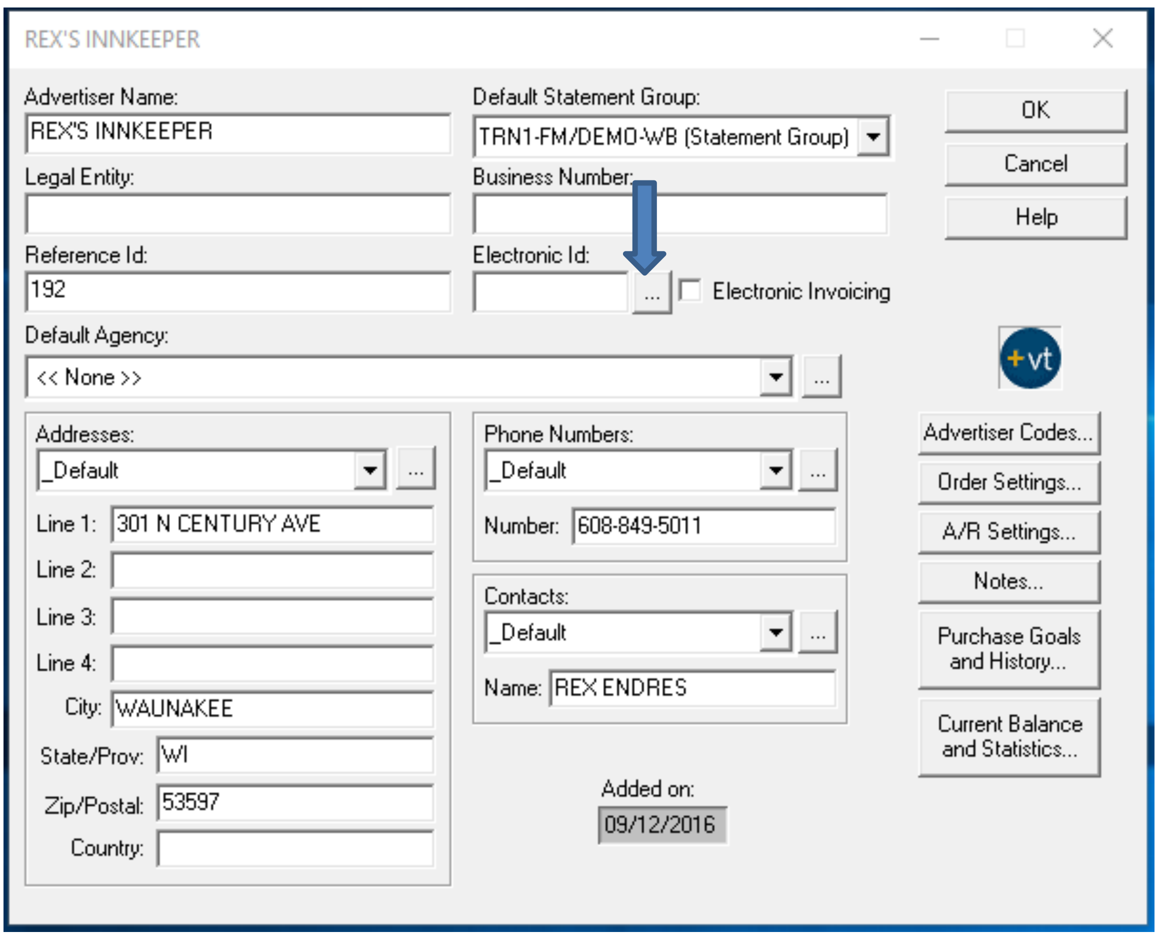
If you do not check “Print Detail”, the invoice will print in a summary, as shown below.

ISCI Code: MCLI594314R/MCLI162314R

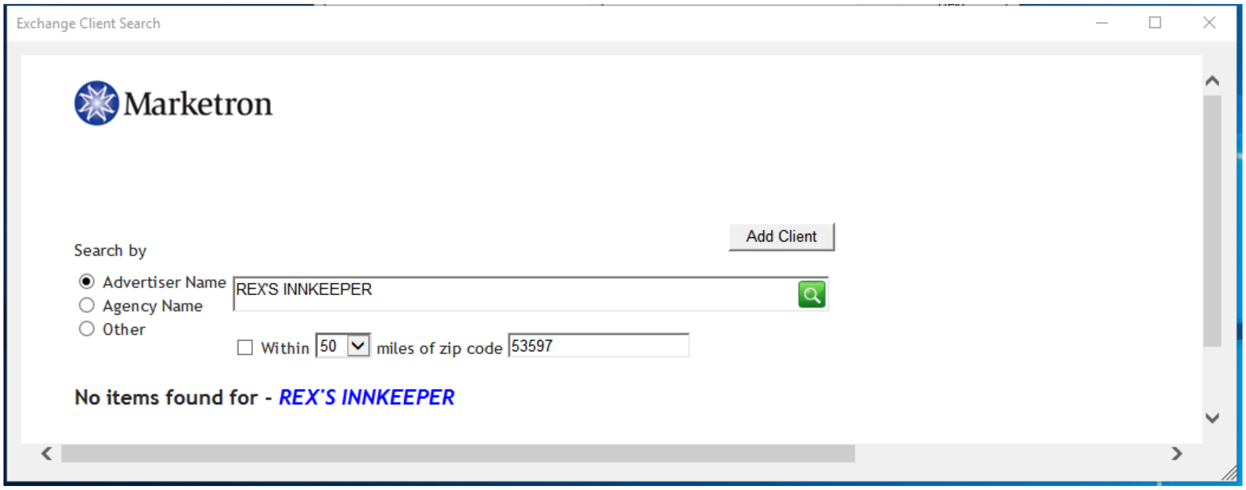
9/1/2014	Mon	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$20.00	$20.00
9/1/2014	Mon	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$30.00	$30.00
9/2/2014	Tue	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$20.00	$20.00
9/2/2014	Tue	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	2	$30.00	$60.00
9/3/2014	Wed	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$20.00	$20.00
9/3/2014	Wed	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$30.00	$30.00
9/4/2014	Thu	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$5.00	$5.00
9/4/2014	Thu	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$20.00	$20.00
9/4/2014	Thu	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$30.00	$30.00
9/5/2014	Fri	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$5.00	$5.00
9/5/2014	Fri	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	2	$20.00	$40.00
9/5/2014	Fri	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	1	$30.00	$30.00
9/7/2014	Sun	1:00	TRN1-FM	Copy: CHEDDAR MELT/DOLLAR BEV	8	$8.00	$64.00

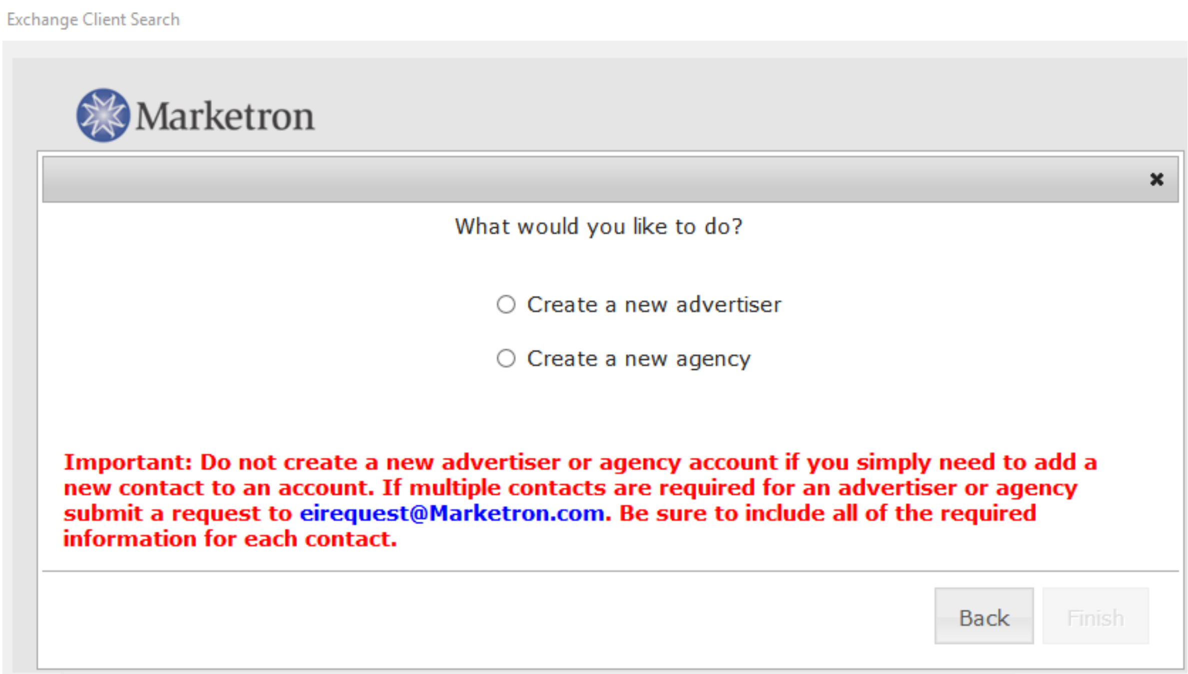
Editing an Existing Direct Advertiser for eInvoicing

1. Go to **VT Main Menu>Advertiser**>**Edit Advertisers** and select Advertiser from list. Click **Edit**.
2. Click on the **Ellipses** button between Electronic ID and Electronic Invoicing. This will take you to the Exchange Client Search.



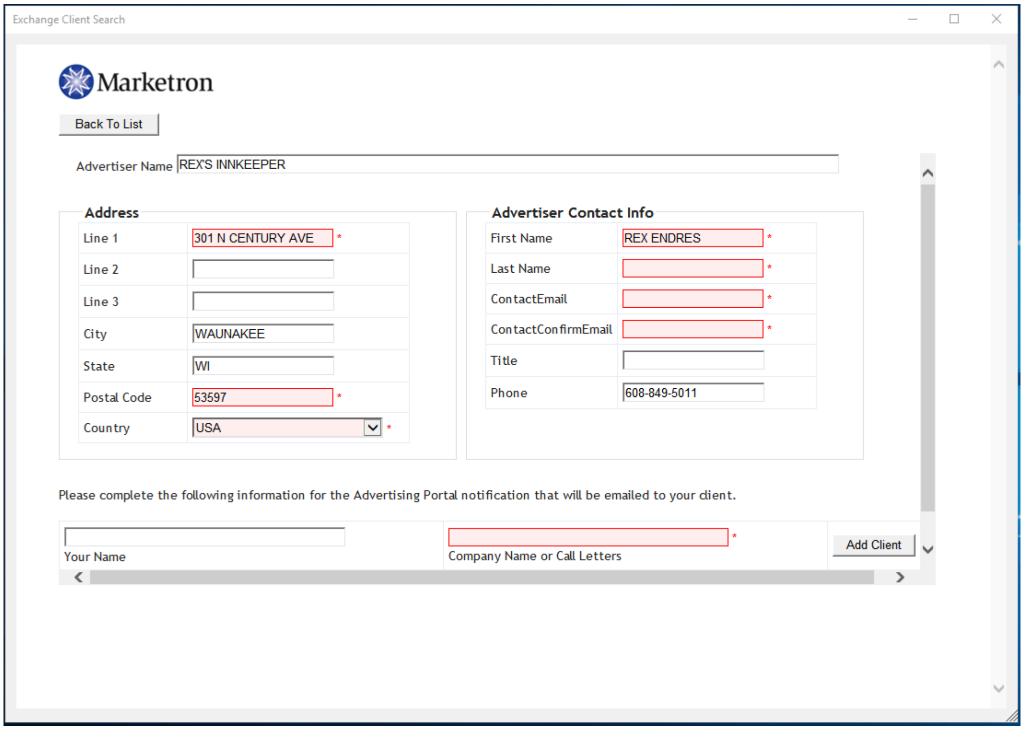
3. If a match or matches are found, they are listed. If nothing is listed, you will need to “Add Client”.





4. Select “Create a new advertiser”.

Sample Add Client Screen

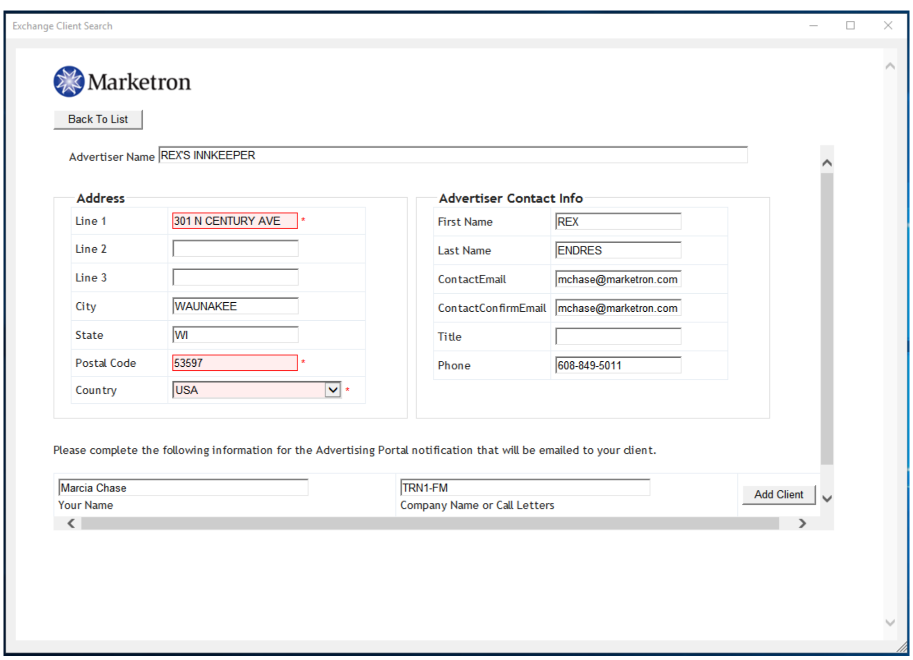


5. Information is imported from Visual Traffic into the “Add Client” boxes. You will need to edit some of the boxes. All boxes in red will need to have data entered in them.

6. Edit the name fields so that the First Name and Last Name are in separate boxes.

7. Fill in the “ContactEmail” and “ConfirmContactEmail” boxes.

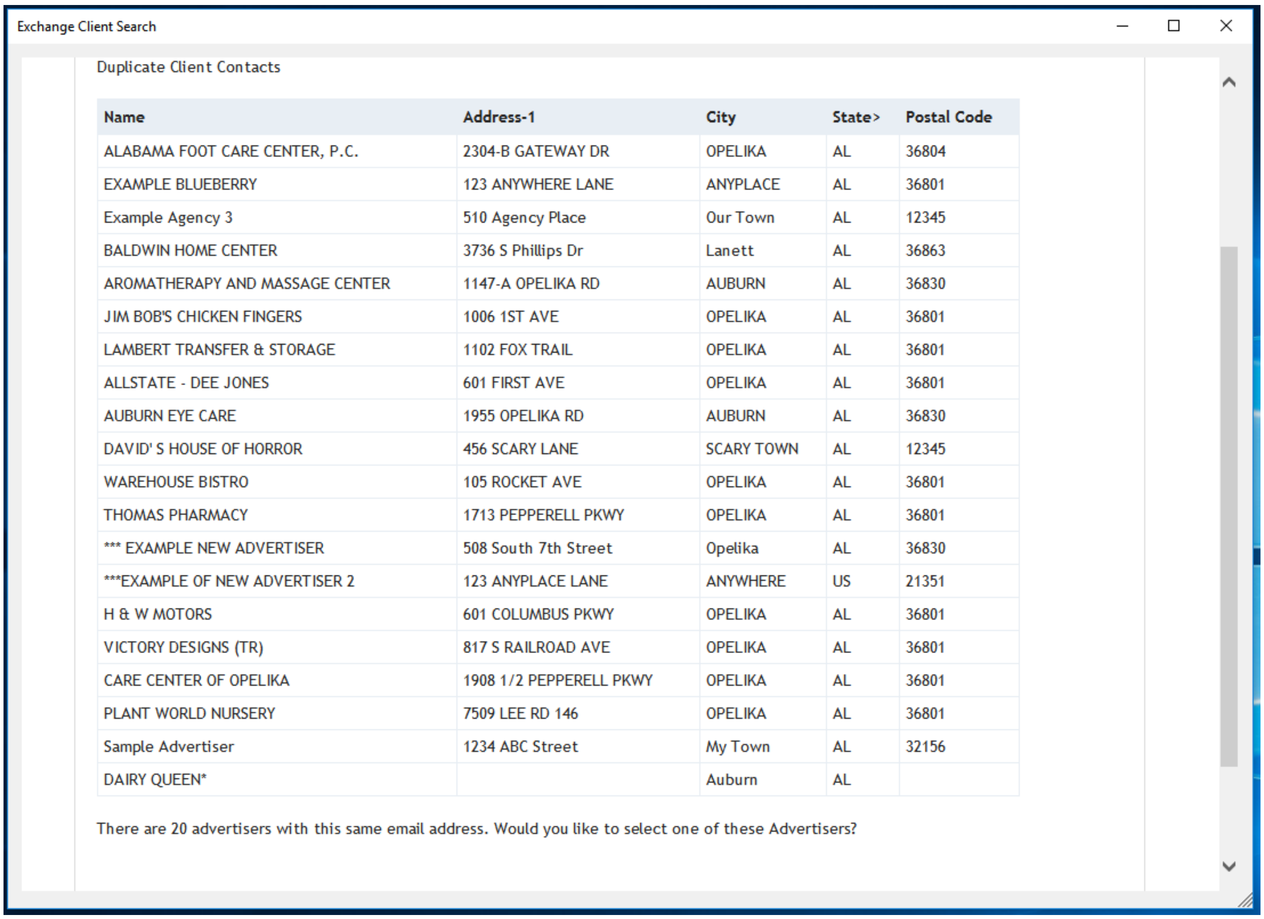
8. Fill in the “Your Name” and “Company Name or Call Letters” boxes.



9. Click Add Client. The advertiser will receive an email notification from the **Exchange Administration Manager**, giving them their login and password to the Marketron Advertising Portal. Agencies will be notified when they have Electronic Invoices available and they will be able to view/download them from the email notification as well as from the Advertising Portal. They will also be able to make changes to their invoice delivery options by logging in to the Advertising Portal.

10. If the email you have entered is a duplicate email, you will see the following screen:

Sample Duplicate Email Addresses Screen


Exchange Client Search

Duplicate Client Contacts

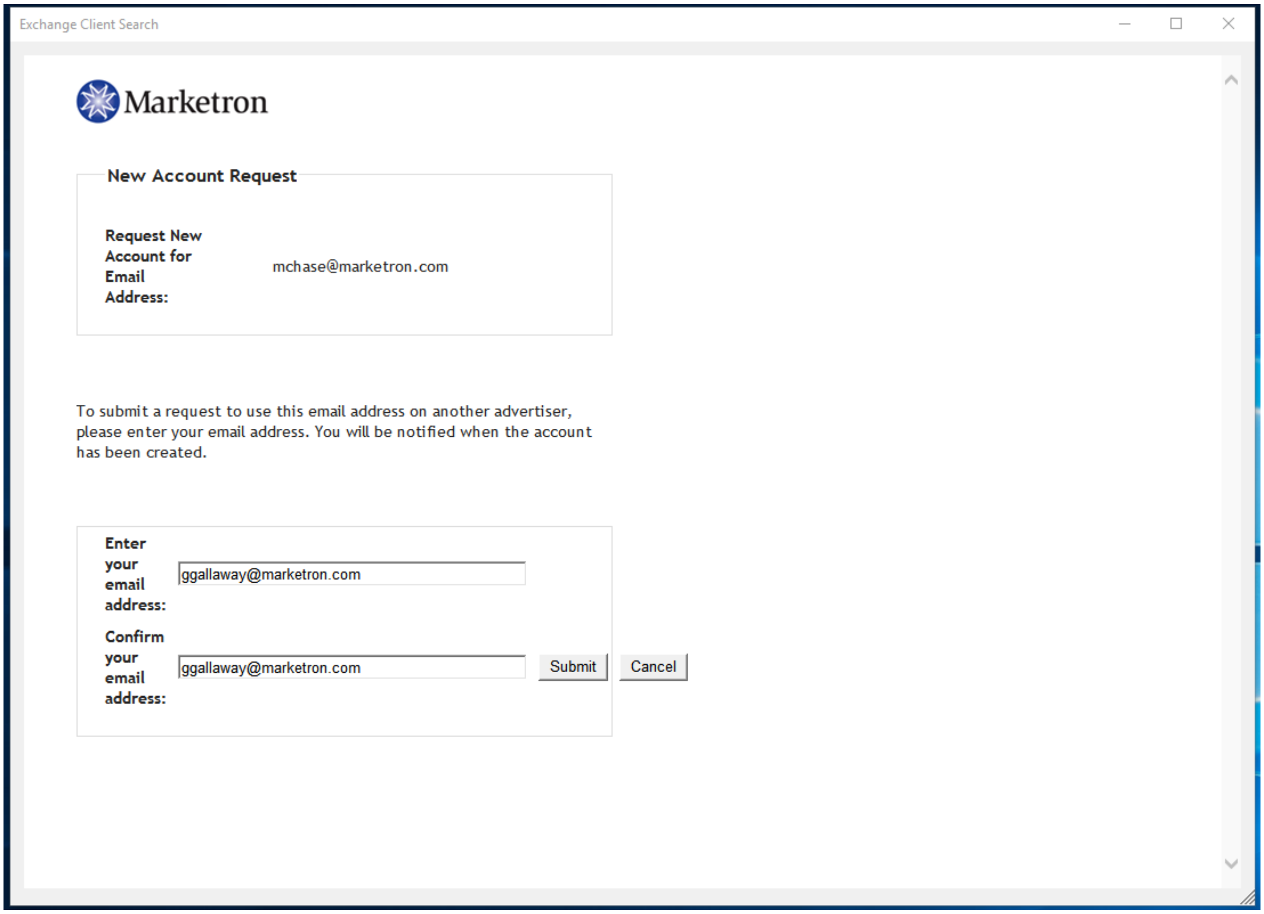
Name	Address-1	City	State>	Postal Code
ALABAMA FOOT CARE CENTER, P.C.	2304-B GATEWAY DR	OPELIKA	AL	36804
EXAMPLE BLUEBERRY	123 ANYWHERE LANE	ANYPLACE	AL	36801
Example Agency 3	510 Agency Place	Our Town	AL	12345
BALDWIN HOME CENTER	3736 S Phillips Dr	Lanett	AL	36863
AROMATHERAPY AND MASSAGE CENTER	1147-A OPELIKA RD	AUBURN	AL	36830
JIM BOB'S CHICKEN FINGERS	1006 1ST AVE	OPELIKA	AL	36801
LAMBERT TRANSFER & STORAGE	1102 FOX TRAIL	OPELIKA	AL	36801
ALLSTATE - DEE JONES	601 FIRST AVE	OPELIKA	AL	36801
AUBURN EYE CARE	1955 OPELIKA RD	AUBURN	AL	36830
DAVID' S HOUSE OF HORROR	456 SCARY LANE	SCARY TOWN	AL	12345
WAREHOUSE BISTRO	105 ROCKET AVE	OPELIKA	AL	36801
THOMAS PHARMACY	1713 PEPPERELL PKWY	OPELIKA	AL	36801
*** EXAMPLE NEW ADVERTISER	508 South 7th Street	Opelika	AL	36830
***EXAMPLE OF NEW ADVERTISER 2	123 ANYPLACE LANE	ANYWHERE	US	21351
H & W MOTORS	601 COLUMBUS PKWY	OPELIKA	AL	36801
VICTORY DESIGNS (TR)	817 S RAILROAD AVE	OPELIKA	AL	36801
CARE CENTER OF OPELIKA	1908 1/2 PEPPERELL PKWY	OPELIKA	AL	36801
PLANT WORLD NURSERY	7509 LEE RD 146	OPELIKA	AL	36801
Sample Advertiser	1234 ABC Street	My Town	AL	32156
DAIRY QUEEN*		Auburn	AL	

There are 20 advertisers with this same email address. Would you like to select one of these Advertisers?

11. You will be asked if you wish to select one of the listed advertisers. You would say yes, for instance, if you were adding a Trade advertiser for an advertiser that already is listed.

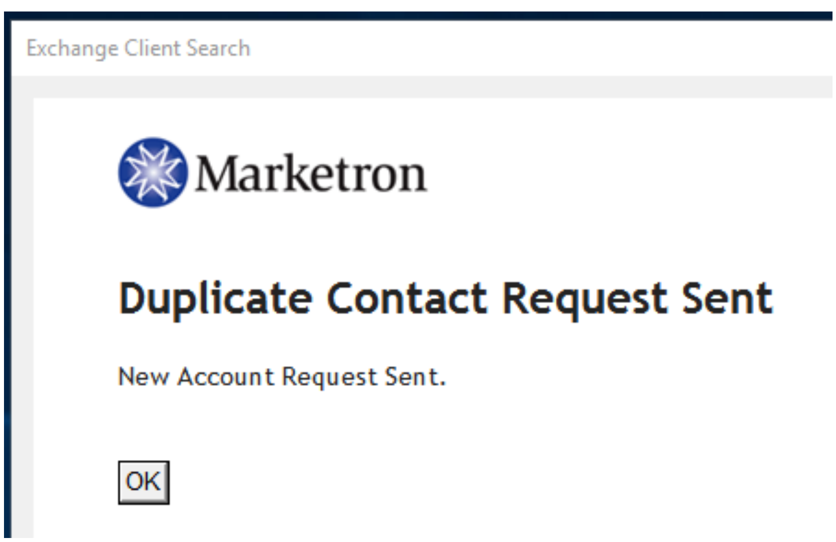
12. If you answer no, you will see the **New Account Request** screen. You would enter your email address so that you will be notified when the account has been created.

Sample New Account Request Screen



13. Once you click Submit, the **Duplicate Contact Request Sent** screen displays. Click OK

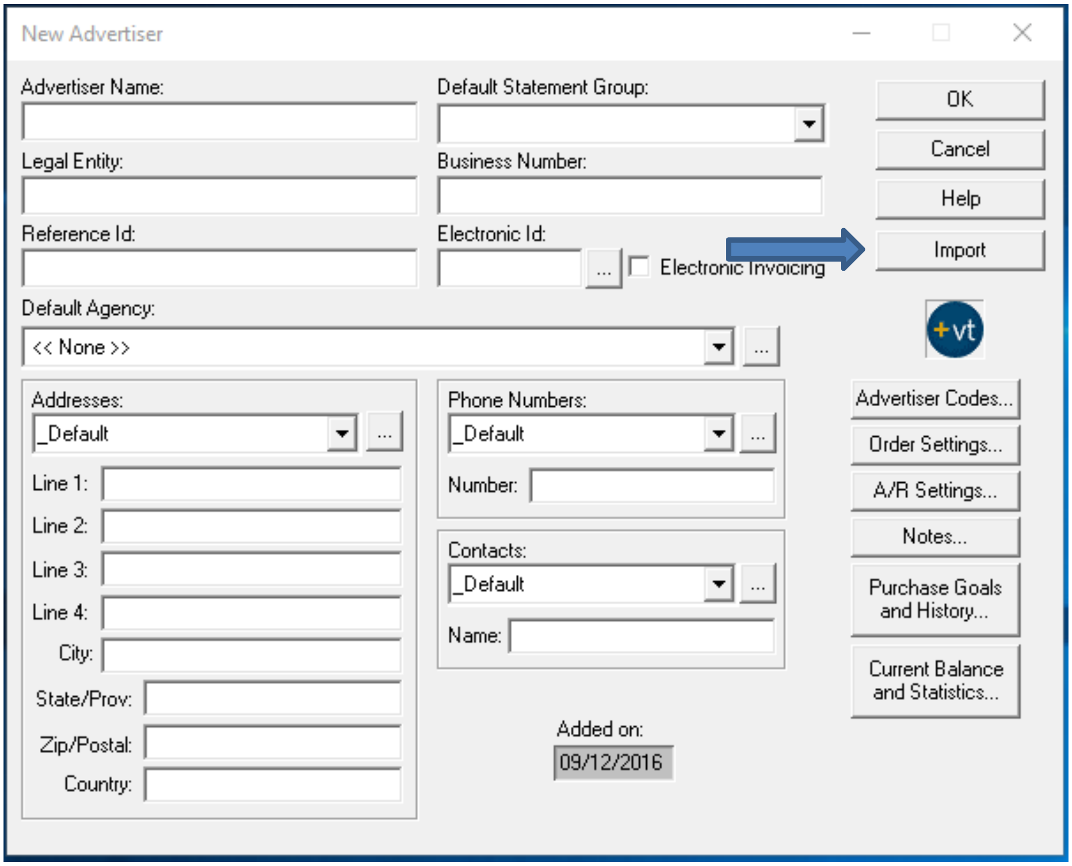
Sample Duplicate Contact Request Screen



Adding a New Advertiser for Electronic Invoicing

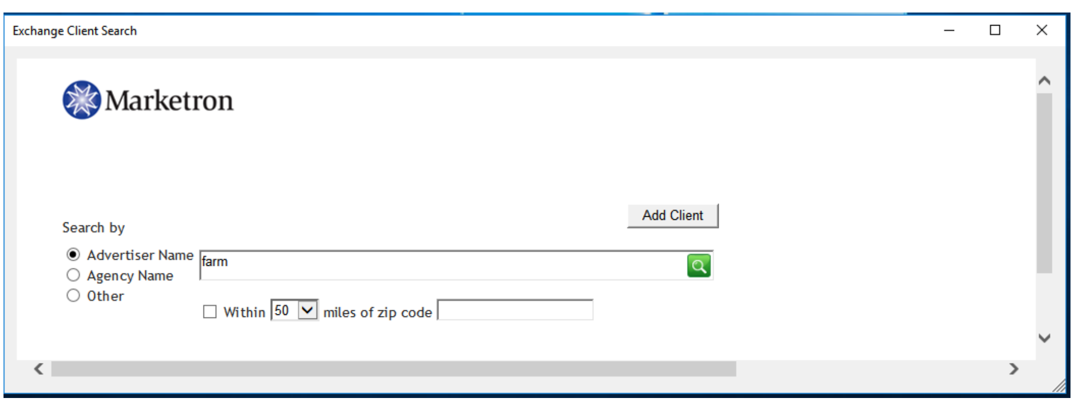
1. When adding a new advertiser to Visual Traffic that requires an Electronic ID (EI) code, go to **Advertiser>Edit Advertisers>New**. On the New Advertiser screen, click on the **Import** button.

Sample New Advertiser Setup Screen

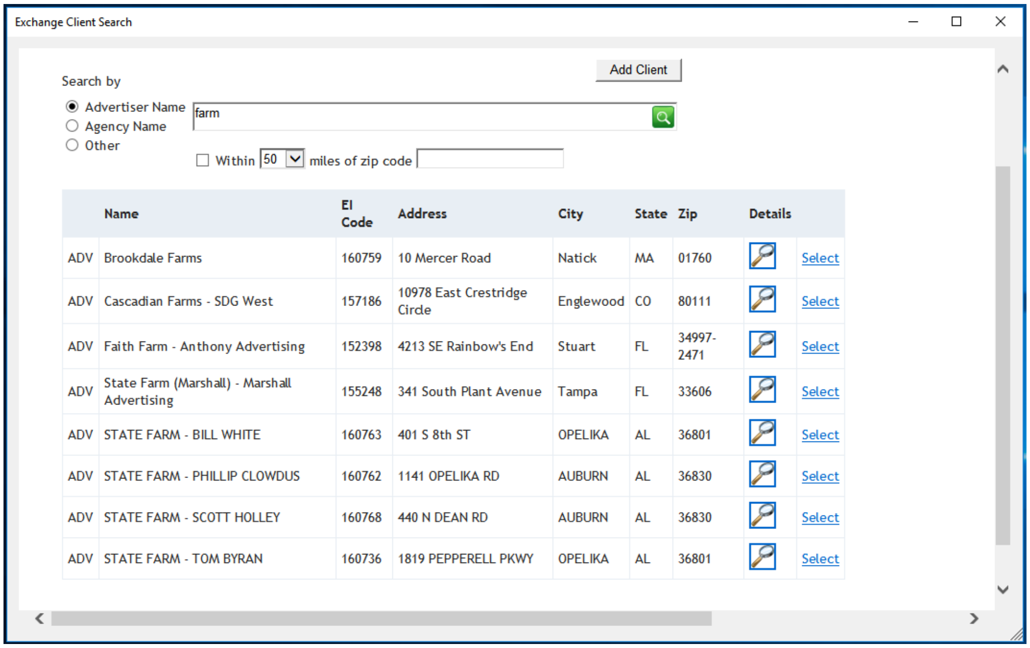


2. On the Marketron Exchange Client Search screen, make sure that the **Advertiser** option is selected, and type in the advertiser's name or a portion of their name in the search box. Click on green **Search** button to search.

Sample Marketron Exchange Client Search Screen



3. If a match or matches are found, they are listed. To confirm that this is the correct Advertiser, click on the magnifying glass for more information. Click on the **Select** link to add the Advertiser to Visual Traffic.



	Name	EI Code	Address	City	State	Zip	Details	
ADV	Brookdale Farms	160759	10 Mercer Road	Natick	MA	01760		Select
ADV	Cascadian Farms - SDG West	157186	10978 East Crestridge Circle	Englewood	CO	80111		Select
ADV	Faith Farm - Anthony Advertising	152398	4213 SE Rainbow's End	Stuart	FL	34997-2471		Select
ADV	State Farm (Marshall) - Marshall Advertising	155248	341 South Plant Avenue	Tampa	FL	33606		Select
ADV	STATE FARM - BILL WHITE	160763	401 S 8th ST	OPELIKA	AL	36801		Select
ADV	STATE FARM - PHILLIP CLOWDUS	160762	1141 OPELIKA RD	AUBURN	AL	36830		Select
ADV	STATE FARM - SCOTT HOLLEY	160768	440 N DEAN RD	AUBURN	AL	36830		Select
ADV	STATE FARM - TOM BYRAN	160736	1819 PEPPERELL PKWY	OPELIKA	AL	36801		Select

4. Once the Advertiser is added to Visual Traffic, select **Electronic Invoicing** and complete your setup by clicking on **Advertiser Codes>Order Settings>A/R Settings** and entering in any required information.

5. **If** the Advertiser you wish to add to Visual Traffic is not listed in the Marketron Exchange Client Search, you can add the Advertiser to Marketron Exchange.

Sample E-mail to a New Agency or Advertiser

From: Exchange Administration Manager
Sent: May 27, 2015 3:38 PM
To: mchasemarketron@earthlink.net
Subject: TRN1-FM Welcomes MCHASE MARKETRON

Dear MCHASE MARKETRON:

Marcia Chase at TRN1-FM has signed you up to join the Marketron Advertising Portal.

https://advertisingportal.emarketron.com
Advertising Portal Login Credentials
User Name: mchasemarketron@earthlink.net
Password: kEdq?726
Electronic ID Code: 169855

This ID can also be given to any other broadcast companies on which you advertise if they use Marketron services.

The Advertising Portal is a service made available to you free of charge by Marketron Broadcast Solutions.

The Advertising Portal gives you the ability to:

- View and download current and historical eInvoices from stations using Marketron services.
- When eInvoices are available, an email notification will be sent to you from: 'Marketron Advertising Portal'.
- Additionally, you may have the ability to process secure electronic payments to the stations on which you advertise, if those stations subscribe to the Marketron PayNow service.
- When needed, you may request changes to your account such as: address, contacts and invoice delivery options.

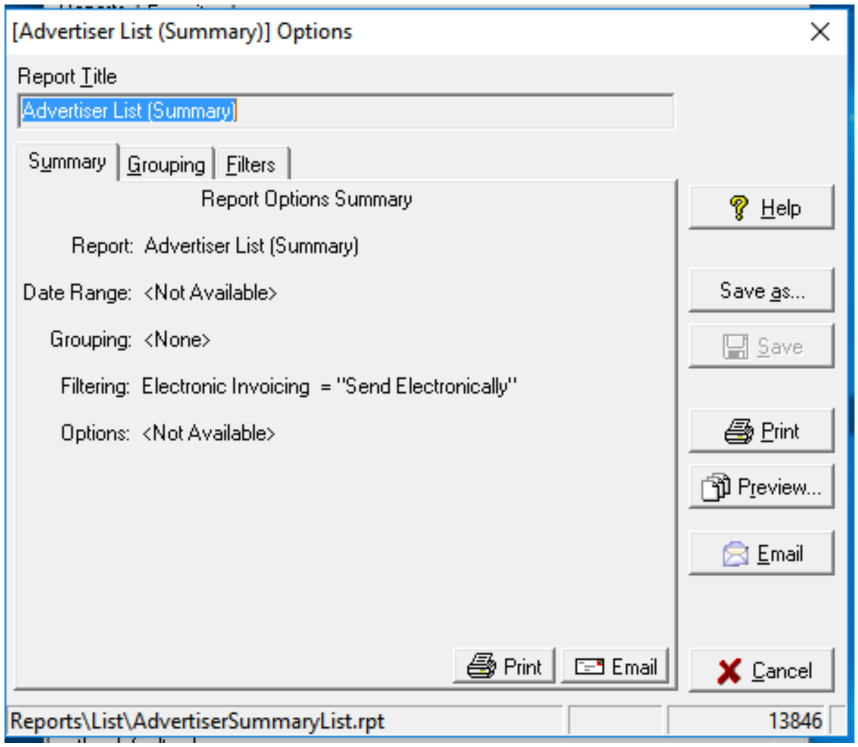
If you have any additional questions, please contact TRN1-FM directly or you can reach out to Marketron at eirequest@marketron.com.

Thank you for taking part in our efforts to make the broadcast industry's environmental impact greener.

Order Setup for Electronic Invoicing

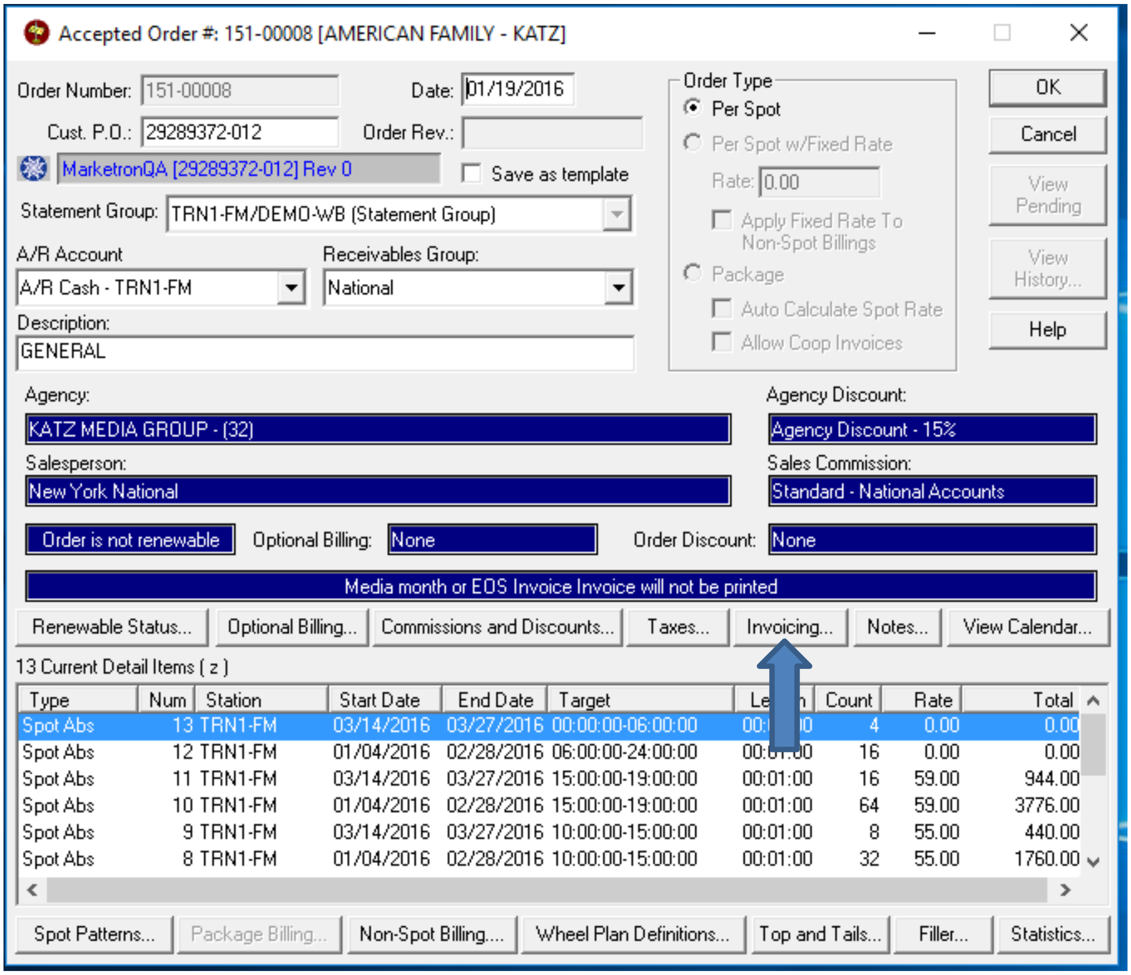
To select the orders that will need to be edited for electronic invoicing, print the Advertiser List (Summary) report from **Report Center>List>Advertiser List Summary**. Under Filters, Filter by Electronic Invoicing and set the filter to equal **Send Electronically**.

Sample Advertiser List (Summary) Screen



1. **VT Main Menu>Orders>Create Edit Orders>**Select Advertiser from drop-down list. Highlight the order you wish to edit and click **Edit**.
2. Click on the **Invoicing** button.

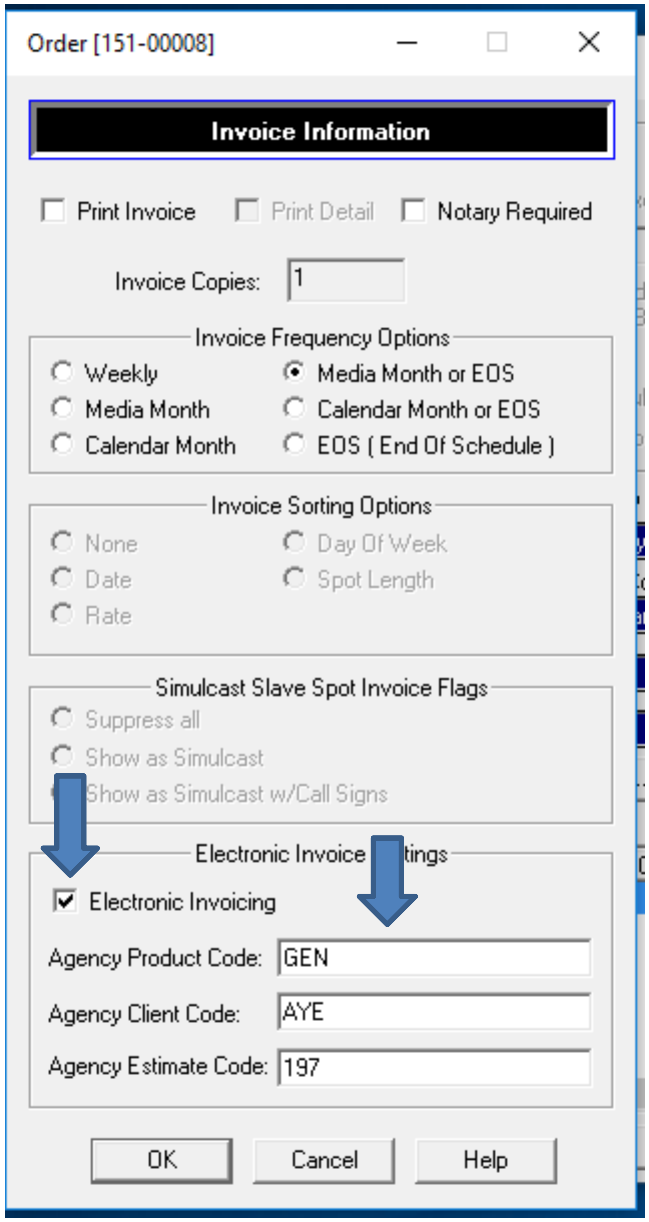
Sample Order Screen



9. Make sure that the **Electronic Invoicing** option is selected. For direct clients, no further action is necessary.

10. For agency clients, in the Agency Product Code, Agency Client Code and Agency Estimate Code, you will enter the codes that are found on the Agency Insertion Order.

Sample Invoice Information Screen



NOTE – Not all Agencies require this information.

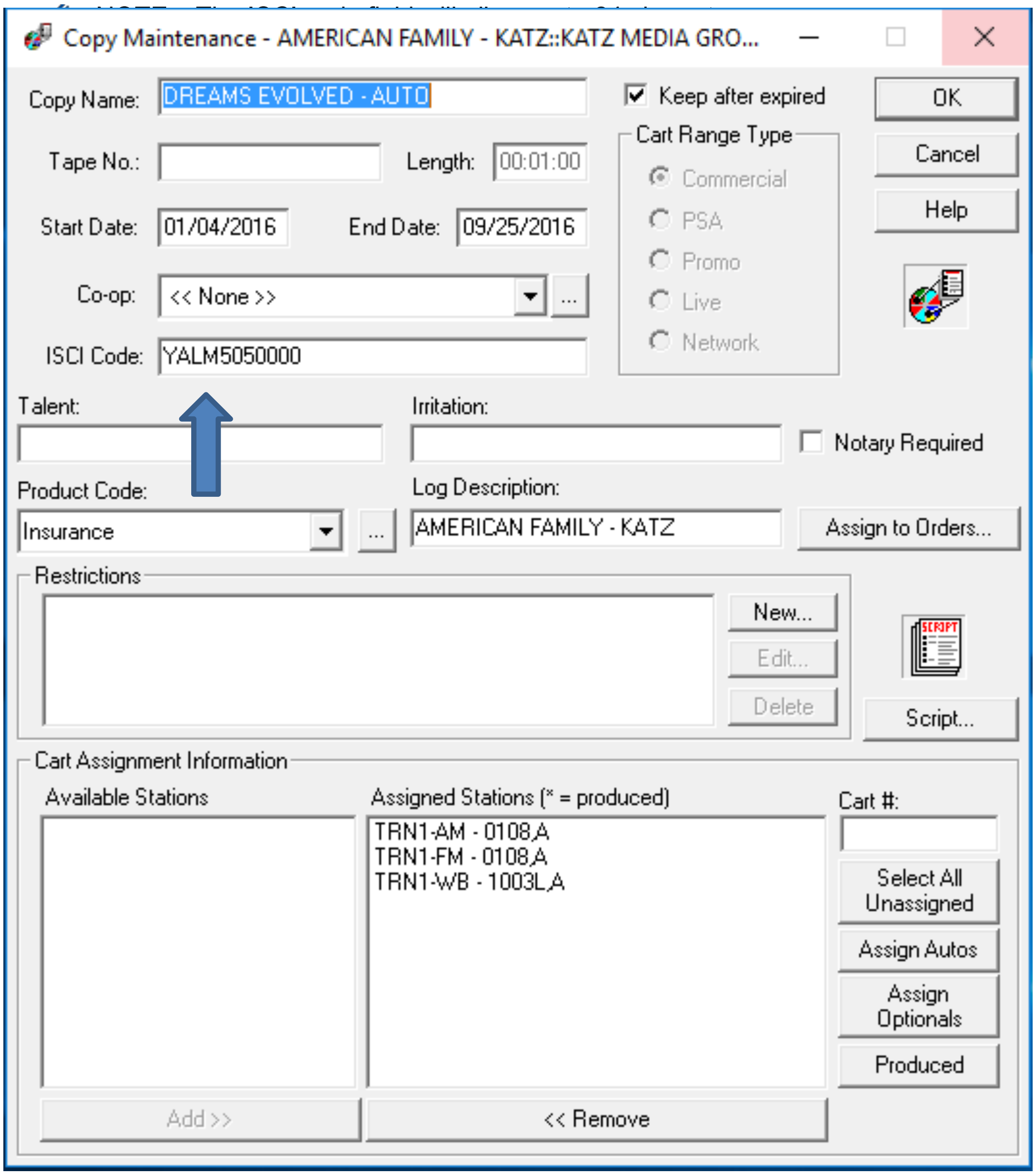
NOTE – If you do not wish your electronic invoices to print, uncheck Print Invoice in the top of the screen.

Copy Setup for Agency Electronic Invoicing

1. Go to **VT Main Menu>Advertiser>Edit Copy & Script**>Select Advertiser from the drop-down list. Select **Copy Record** from the list and select the **Edit** option.

2. In the **ISCI** field enter the ISCI code. You may also choose to use NA or Live Read for pieces of copy that do not have an ISCI code. This is usually required by agencies. The agency includes the ISCI code on their traffic instructions sent to the station.

Sample Copy Maintenance Screen



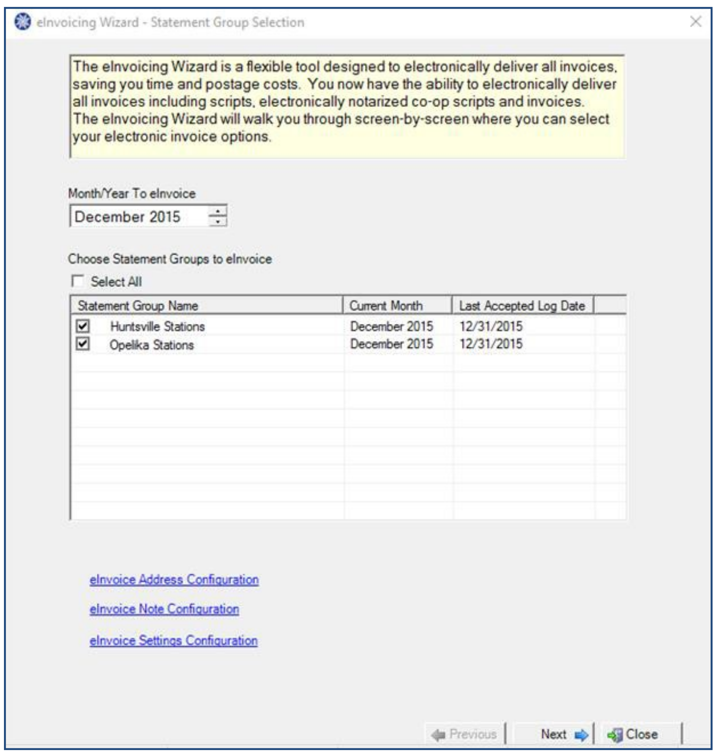
Sending eInvoices

Before sending eInvoices using the eInvoice Wizard some configuration is required. This will ensure your invoices will meet your station's requirements before transmitting.

To launch the eInvoicing Wizard, go to **Billing> Send eInvoices.** Once you have launched the eInvoicing Wizard from the Billing menu you will notice three configuration links at the bottom of the Statement Group Selection screen. Here is where remittance addresses and invoice notes will be entered as well as determining other eInvoice settings.

The Statement Group Selection screen is the first step of the eInvoicing Wizard. The Wizard will be aware of your **Current Month** and **Last Accepted Log Date** so it will automatically default to the correct **Month/Year to eInvoice**. If necessary, you can change the **Current/Month Year to eInvoice**. Click Next when you are ready to proceed.

Note: Should you have multiple Statement groups and your Current Month and Last Accepted Log Date do not match, the eInvoice Wizard will default in the Month/Year to eInvoice date to the earliest Month/Year to eInvoice.



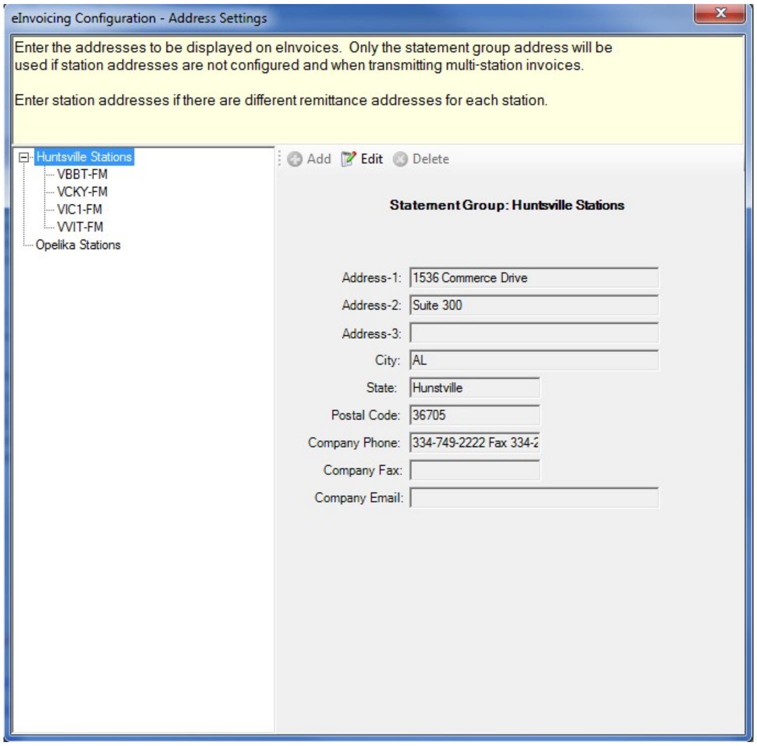
eInvoice Address Configuration

This screen is where you will define the remittance address you want displayed in the header of the electronic invoice.

If one address fits all stations, then you simply need to enter an address for the Statement Group. Highlight the Statement Group name in the tree on the left. Click Edit and enter the Statement Group address and other information in the fields provided.

In those situations, where each station has its own remittance address you will highlight each station and add the correct remittance address for each station. If no station address is present for the station the system will revert to the Statement Group address for the electronic invoice remittance address.

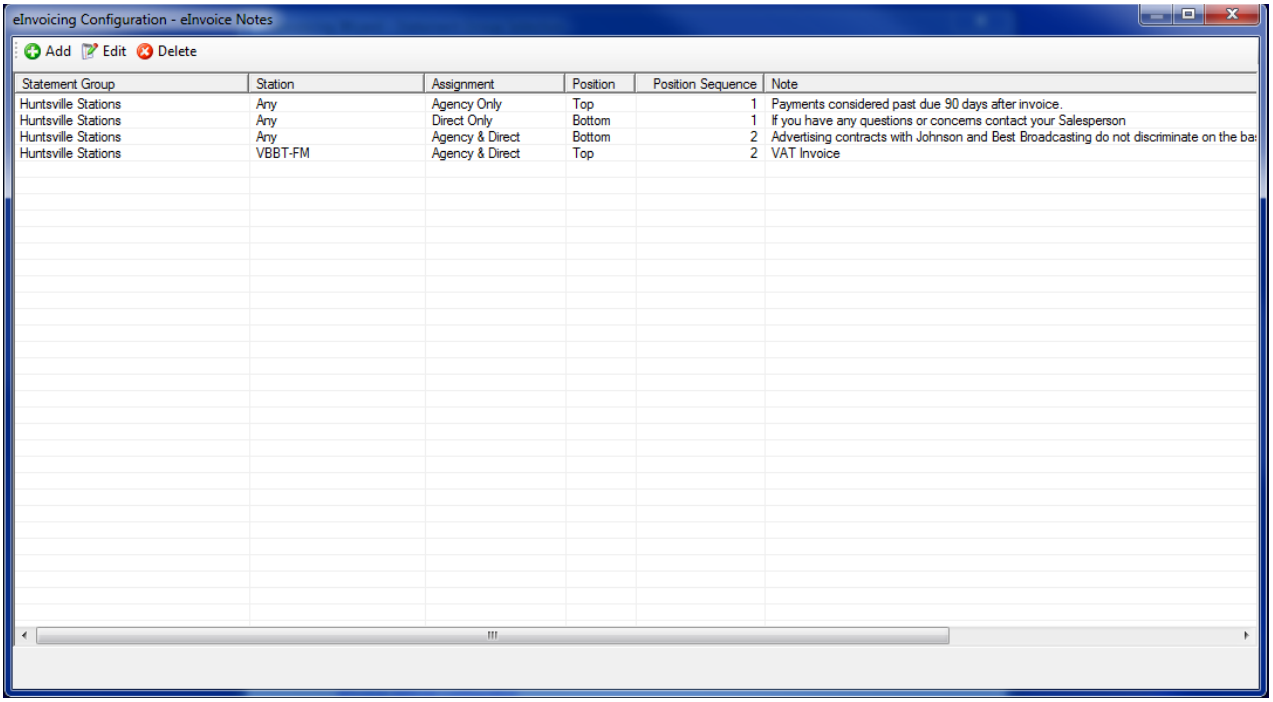
The Delete option simply removes the address from the station address fields. It does not remove the Statement Group or station from the list.



eInvoice Notes Configuration

Notes Configuration allows you to easily enter and edit global notes that will be used specifically on electronic invoices. The eInvoice Notes screen gives you a summarized view of all the global notes entered for eInvoicing.

Note: When upgrading to VT 5.0 from earlier versions, any existing notes in **AR/Statement Group/Statement and Invoice Notes** will copy over to the eInvoice Note Configuration. Advertiser/Agency or invoice specific address, contact and notes can be controlled as normal using the new **_eInvoice** (Adv/Agy) Document Group. The upgrade will automatically copy the contents of the **_Invoice** Document Group to the new **_eInvoice** Document Group



eInvoicing Configuration - eInvoice Notes

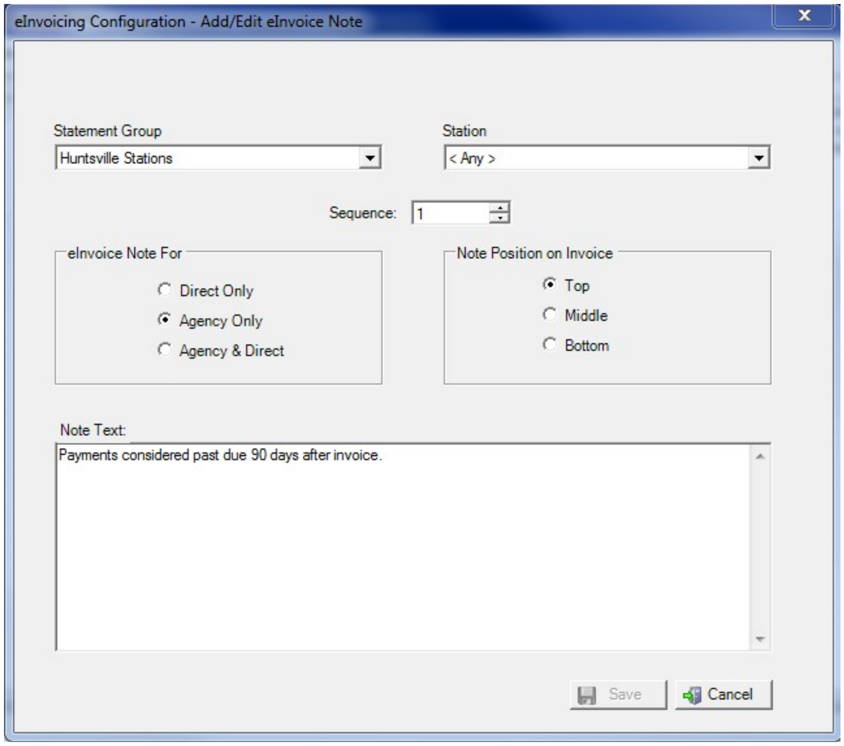
Add Edit Delete

Statement Group	Station	Assignment	Position	Position Sequence	Note
Huntsville Stations	Any	Agency Only	Top	1	Payments considered past due 90 days after invoice.
Huntsville Stations	Any	Direct Only	Bottom	1	If you have any questions or concerns contact your Salesperson
Huntsville Stations	Any	Agency & Direct	Bottom	2	Advertising contracts with Johnson and Best Broadcasting do not discriminate on the ba
Huntsville Stations	VBBT-FM	Agency & Direct	Top	2	VAT Invoice

Add/Edit eInvoice Note

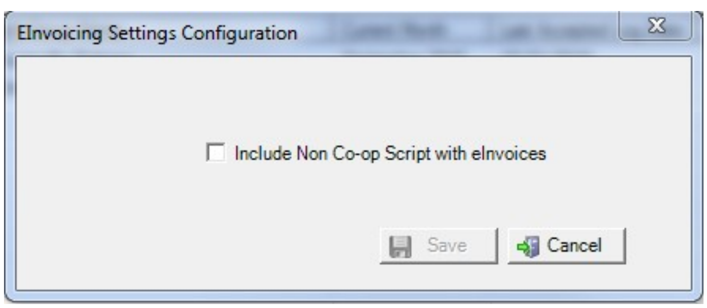
Click Add to enter a new eInvoice note.

- **Statement Group:** This will determine to which Statement Group the note is to be assigned.
- **Station:** Select the station to which this note is to be assigned. The note will only print on eInvoices for the selected station or you can choose <Any> station.
- **Sequence:** This allows you to choose in which order you want the note to place. For instance, if you assign 2 as the sequence, this note will be the second note in the list of notes.
- **eInvoice Note For:** Choose to which client type you want to see this note: Direct Only, Agency only or Agency and Direct
- **Note Position on Invoice:** You can choose where you want the note displayed on the eInvoice:
  - **Top** notes will place immediately below the header.
  - **Middle** notes will print after the invoice summary, but before the invoice details.
  - **Bottom** notes will print at the bottom of the invoice after the invoice detail.
- **Note Text:** Key in or copy and paste in the text of the note.
- **Save:** Be sure to save your note.

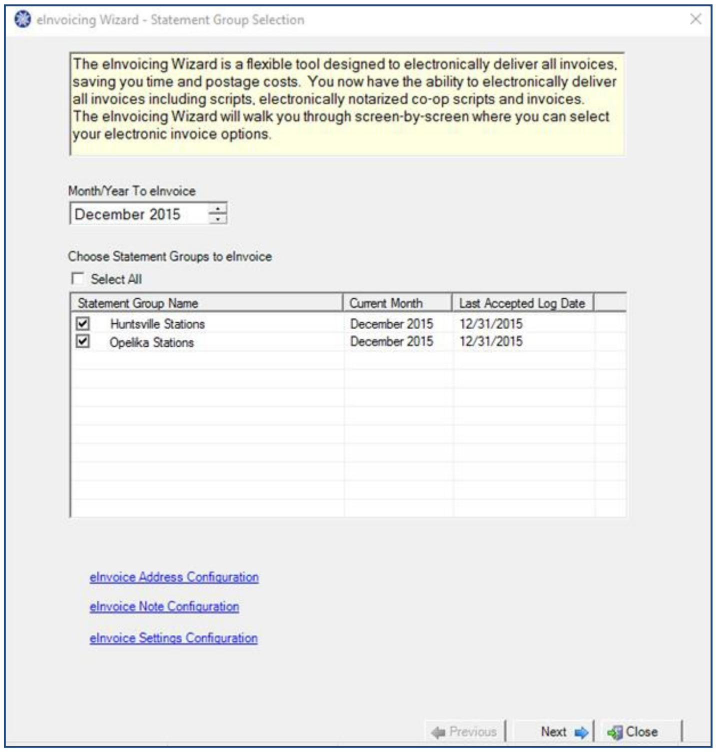


eInvoice Settings Configuration

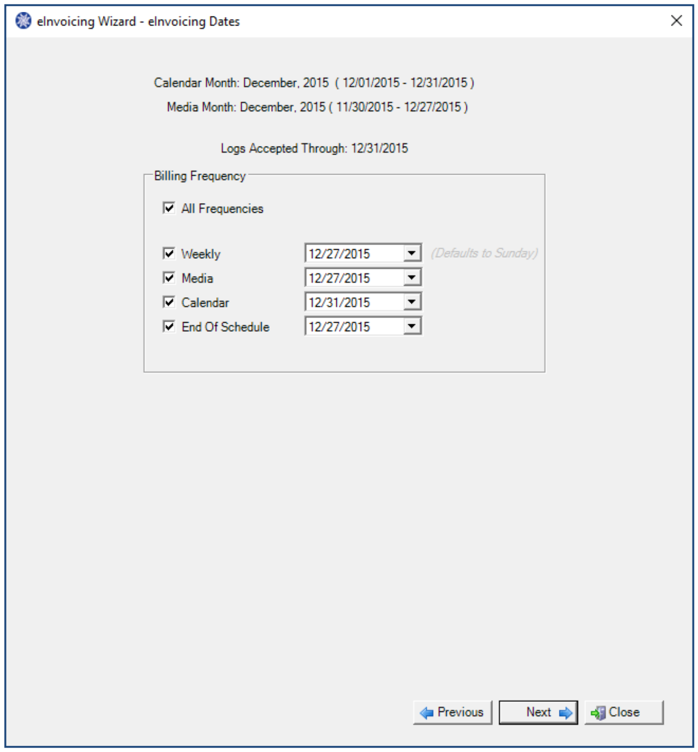
There is one setting under this configuration option. If during the transmission of sending electronic invoices you want to include scripts that are not co-op, you can select this option.



eInvoice Wizard – Sending Electronic Invoices



The eInvoicing Dates page will automatically default in the correct dates for each Billing Frequency and will default to eInvoice all Billing Frequencies. You do have the option to select the Billing Frequencies you wish to invoice and if necessary change the dates. Click Next to continue.



On the eInvoicing Option page you can select the clients and criteria for eInvoicing.

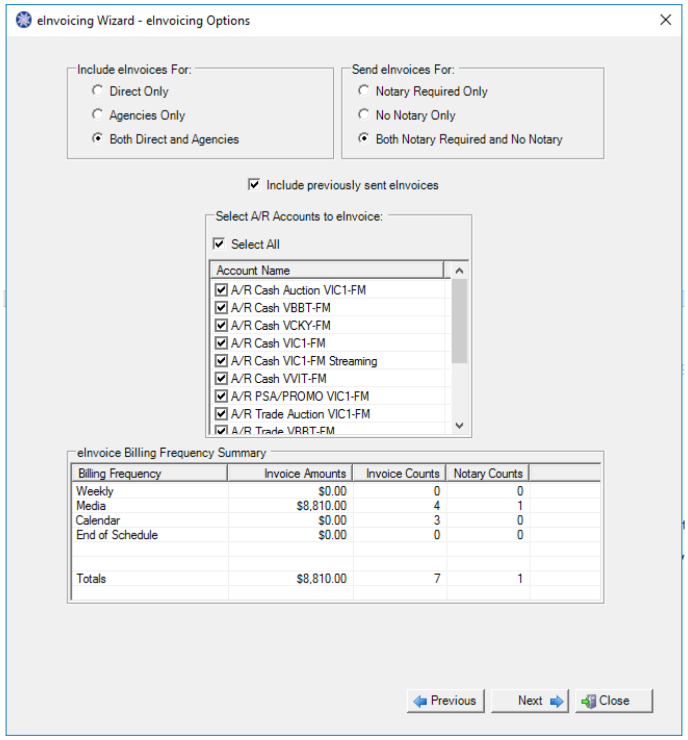
- **Include eInvoices For:** gives you the option to select the type of client to electronically invoice:
  - Direct Only
  - Agencies Only
  - Both Direct and Agencies.

- **Send eInvoices For:** Choose if you which to send electronic invoice that are:
  - Notary Required Only
  - No Notary Only
  - Both Notary Required and Not Notary

- **Invoices previously sent eInvoices** – Checking this option means that any electronic invoices that had already been sent for this date range will be retransmitted.

- **Select A/R Accounts to eInvoice** – Like the Invoice Print Wizard you can pick and choose the A/R Accounts you wish to eInvoice. The default is to check all A/R Accounts.

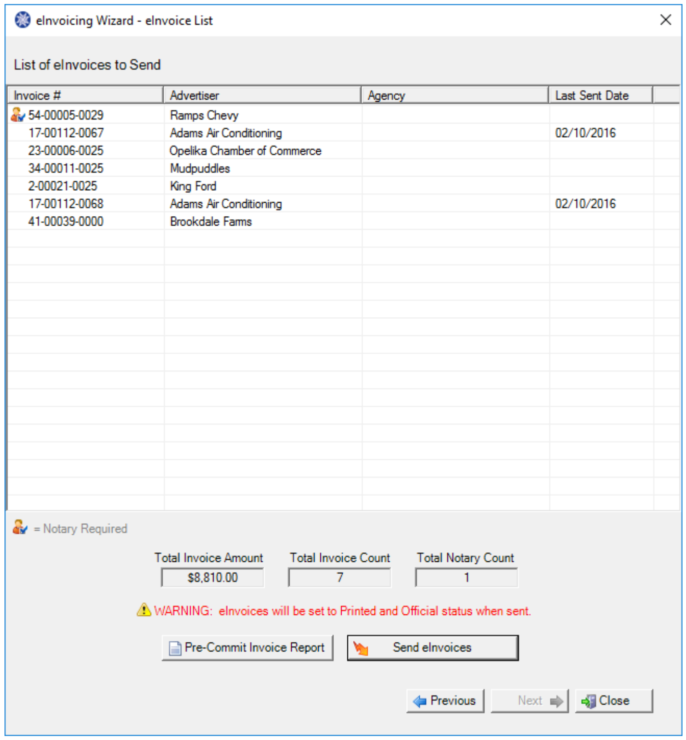
- **eInvoice Billing Frequency Summary** will display, based on Billing Frequency information about the electronic invoices you will send based on your eInvoice Option selections. The information shown will invoice the total dollar value, invoice count and the number of invoices requiring notary for each Billing Frequency.



Click Next to continue.

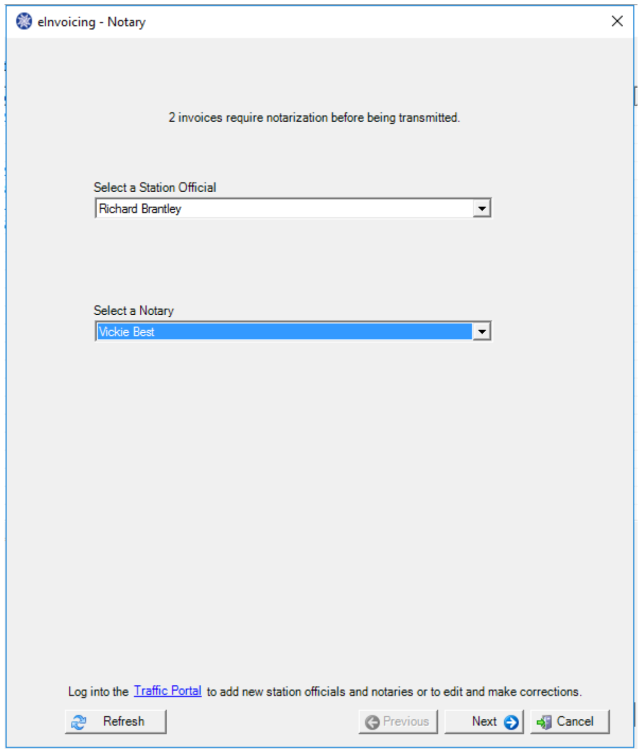
On the next screen, the eInvoice List will display a list of all the invoices to be transmitted based on your selections. Any invoices requiring Notary will display an icon to the left of the invoices. At the bottom of the screen is a total dollar value of the invoices to be delivered and a total invoice and notary count.

- **Pre-Commit Invoice Report** – This button will give you the option to view/print or export the report. It will be filtered to the invoices you've chosen to transmit.
- **Send eInvoices** – When you are ready to send the electronic invoices, click on the Send eInvoices button. This will launch the eInvoicing Notary screen or immediately send the invoices if no notary is necessary.

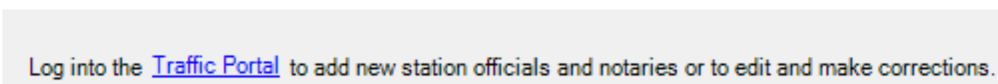


If there are notarized invoices and/or cop-op script affidavits are to be transmitted, you will be directed to the eInvoicing Notary page. Here you will select from the dropdown boxes the Station Official and Notary who will eSign the electronic invoices.

Note – The eInvoicing Notary and Notary Preview pages will be skipped if there are no notarized eInvoices or electronic co-op affidavits to be transmitted.



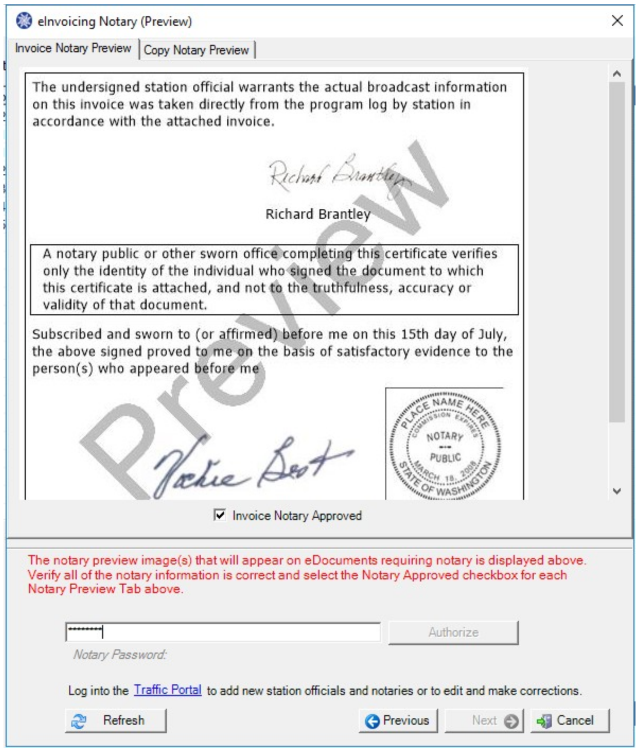
The names available in the dropdown will be dependent on the names and setup information that was entered in the Traffic Portal. If the name or names you require are not listed, then you can click on the Traffic Portal link at the bottom of the page.



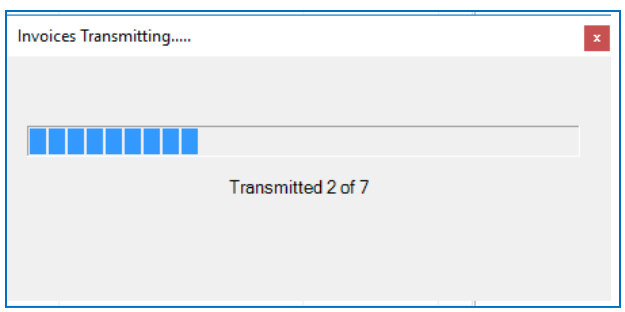
This will take you directly to the Traffic Portal. Click Next to continue.

If notarized electronic invoices and/or co-op script affidavits are being delivered, the eInvoicing Notary screen will display. Here a preview of the notary image(s) will display to show how the notary will appear. When both invoices and co-op documents must be notarized, there will be a tab for each preview. You must approve each image preview by selecting the tab and checking the box to approve.

Once the image(s) is approved, the Notary can key in their password and Authorize the processing of the eInvoices. The Authorize button will not be enabled until the image(s) have been approved and the Notary password is entered.

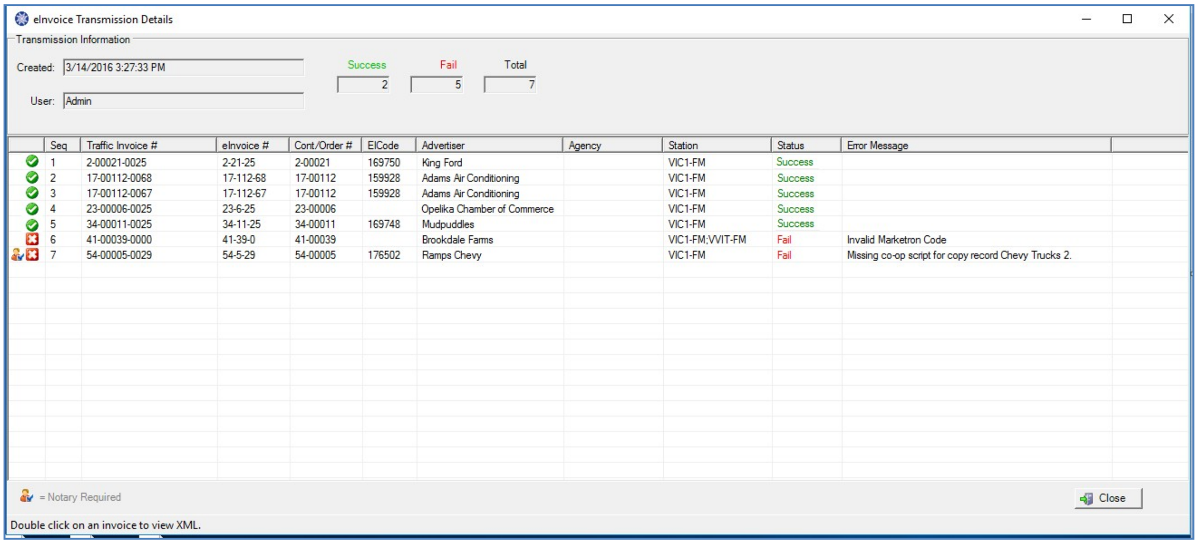


The eInvoices will then begin to transmit.



Once the invoices have been transmitted, the eInvoice Transmission Viewer will launch showing all invoices that were transmitted in the batch and the status of the invoice.

If there were any errors that caused the transmission of any of the invoices to fail to transmit, they will be clearly identified and a reason for the failure will be noted in the error message column. The user can correct the issue and then transmit the invoices.



Seq	Traffic Invoice #	eInvoice #	Cont/Order #	EICode	Advertiser	Agency	Station	Status	Error Message
1	2-00021-0025	2-21-25	2-00021	169750	King Ford		VIC1-FM	Success	
2	17-00112-0068	17-112-68	17-00112	159928	Adams Air Conditioning		VIC1-FM	Success	
3	17-00112-0067	17-112-67	17-00112	159928	Adams Air Conditioning		VIC1-FM	Success	
4	23-00006-0025	23-6-25	23-00006		Opelika Chamber of Commerce		VIC1-FM	Success	
5	34-00011-0025	34-11-25	34-00011	169748	Mudpuddles		VIC1-FM	Success	
6	41-00039-0000	41-39-0	41-00039		Brookdale Farms		VIC1-FM;VVIT-FM	Fail	Invalid Marketron Code
7	54-00005-0029	54-5-29	54-00005	176502	Ramps Chevy		VIC1-FM	Fail	Missing co-op script for copy record Chevy Trucks 2.

eInvoice Transmission Viewer

The eInvoice Transmission Viewer, which is located under the Billing Menu, allows you to search for eInvoices that have been transmitted.

Under the **Summary** tab you can search for a summarized list of all the invoice batches that have been delivered based on your search criteria. You can see the date and time the batch was delivered, the user name, the stations for which the eInvoices were delivered, the total number of invoices in the batch and if there were any errors in the batch.

The filter options are:

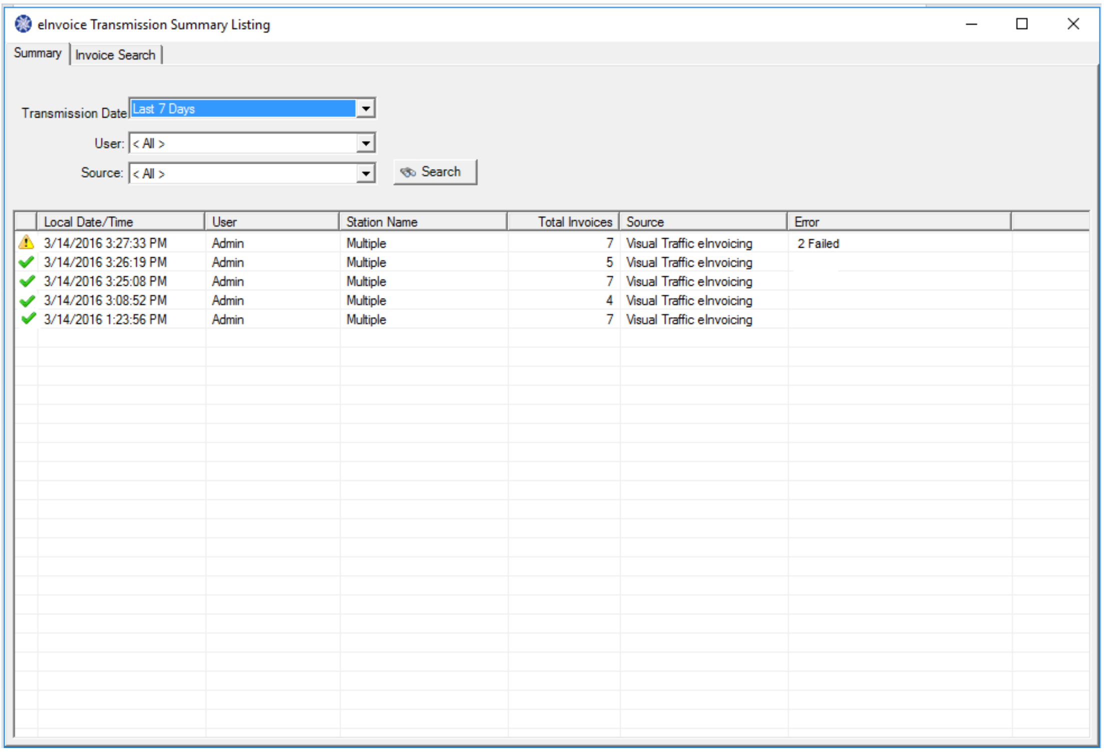
- **Transmission Date** – This allows the user to search for invoices based on the date the invoices were electronically transmitted.

  The date options are:
  - Today
  - Since Yesterday
  - Last 7 Days
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - <Custom>

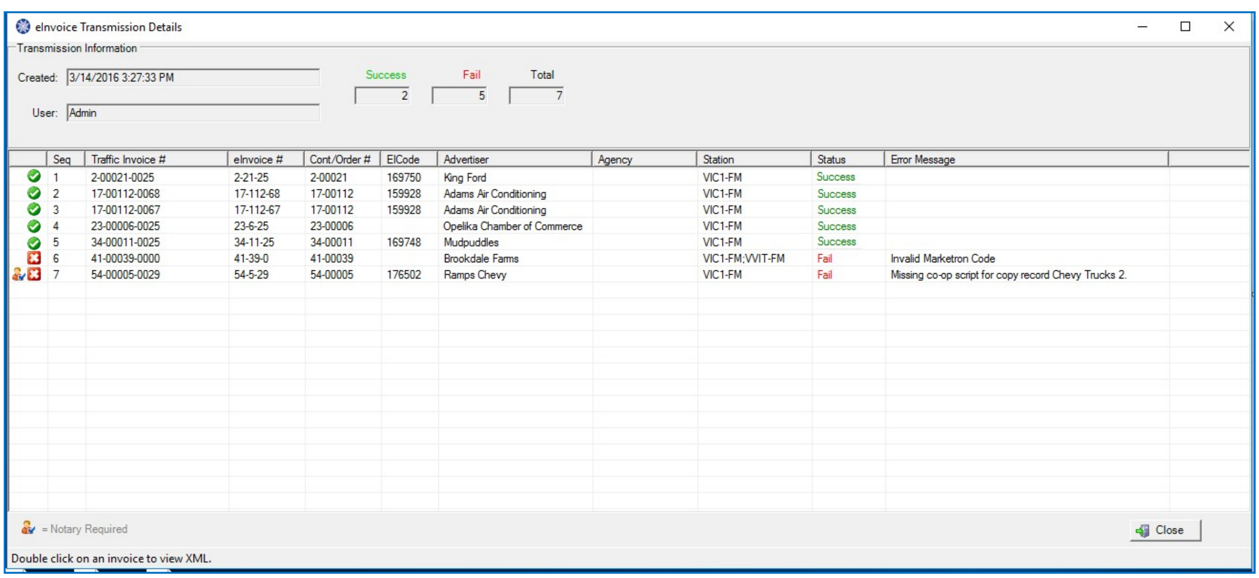
- **User** – This filter allows you to search for invoices based on the user who transmitted them.

- **Source** – Aside from searching for “All” sources, there are two Source filters.
  - Invoice Express Conversion – This option would filter to any invoices that were transmitted prior to the upgrade to VT 5.0. Those invoices were delivered using Invoice Express. Any invoices delivered prior to the upgrade to VT 5.0 will be converted over to the eInvoice Transmission Viewer.

- Visual Traffic eInvoicing – Electronic invoicing in VT 5.0 no longer uses the Invoices Express service for transmitting eInvoices. When searching for any invoices delivered after the upgrade to VT 5.0 this option can be selected.



Double clicking on a summary line will launch a screen that will list all of the invoices transmitted in the batch.



The Invoice Search tab in the eInvoice Transmission Wizard allows you to conduct a search for specific electronic invoices using a number of filtering options, which include:

- Begin Date
- End Date
- Traffic Invoice #
- eInvoice #
- Contract/Order #
- Advertiser
- Agency
- Client Code