

Adjusting Dates/Removing Products

1. **In the tree:** Click Line Items
2. **Open the line item:** Click the line item number to open the product you are adjusting or deleting

***when deleting a package, please make sure you are deleting all the product lines associated with that package. We haven't covered packages yet, but wanted to make sure to say it now.*

Classified Package

Quick Line Entry





Select a Product

Select an Ad Type

Full Line Entry

Numbers in the Grid

Display Estimated Net Amounts

ID	Product	Description	Copy	Ad Type	Start Date	End Date	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021
1047	PAN - Facebook Size: 5000 x 15000 (0 x 0) Section: ALL	MP: 20000-25000		MUNFF	3/19/2021	3/19/2021	2,767.50	0.00	0.00	0.00	0.00
1048	PFW - Native on PFW.com Section: ALL Position: PFWWEBNAT	Native on PFW.com		FFDIG	4/1/2021	4/1/2021	0.00	945.00	0.00	0.00	0.00
1049	HCP - Banner Ads on HCP.com Size: IMU (300 x 250)	IMU		CPM	3/13/2021	6/24/2022	72.11	72.11	72.11	72.11	72.11
1050	AW - Automation World Magazine	1/2 Page Island		FFPRT	3/15/2021	3/15/2021	3,240.00	0.00	0.00	0.00	0.00

1051

Package

ID: 82

(5.125 x 8.375)

AW - Standard e-blasts

Size: Case Study (0 x 0)

Section: ALL

Position: AWEBSLOT

Cas

3. To Delete a Product from the order:
 - a. Click Delete

pmgtest.navigahub.com/EW/PMG/ad/campaign_lines.aspx?ID=170

EDITING FLAT FEE LINE: 1051

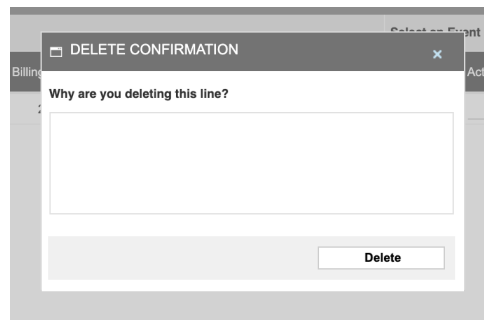
Ratecard	AW - Standard e-blasts - NM0201	Proportion Values	Every by Issue	Adjusted Flat Fee	4,882.50
Description	Case Study			TOTAL FOR ALL ISSUES	
Position	AW E-blast Slot 1			Total Amount	4,882.50
				Estimated Tax	0.00
				Estimated Total	4,882.50

Issue Date	Material	Material Status	Billing Amount	Current Inps	Current Clicks	Current as of	Actual Inps	Actual Clicks	Invoice ID	External ID	Credit ID	Credit	Delete
3/13/2021	891		4,882.50	0	0		1	0					

4,882.50 0 0 1 0

View Production Schedule **Delete this Line** Cancel Save Changes

- b. A box asking for the reason you are deleting this item... You don't need to give a reason, just click delete.

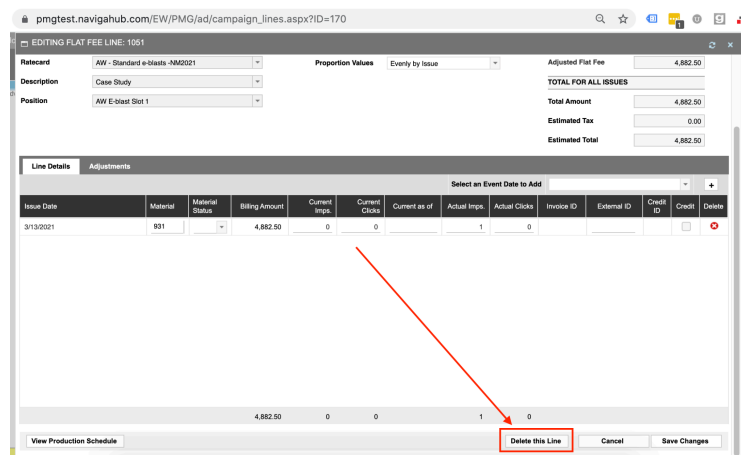


- c. Click Ok

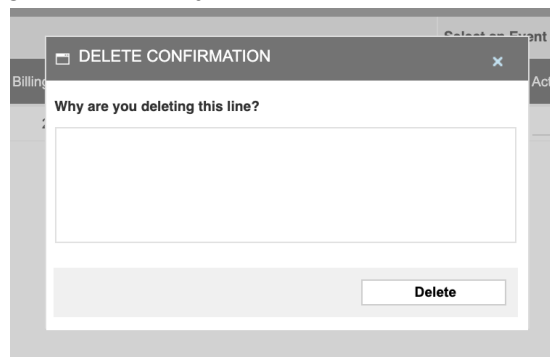
4. **To update a date:** There are two ways to update a date.

- a. The first way is to delete the line item from the plan completely and re-add the product with the desired date.

- i. Click Delete



- ii. A box asking for the reason you are deleting this item... You don't need to give a reason, just click delete.



- iii. Click Ok
- iv. To add the new date, re-add the product using quick line entry.

b. The second way is to update the date in line item:

- i. Click the red “x” to delete the date attached. (the old date will just disappear)

EDITING FLAT FEE LINE: 1047

Ratecard: PAN - Facebook - NM2021
 Description: MP: 20000-25000

Proportion Values: Evenly by Issue

Adjusted Flat Fee: 2,767.50

TOTAL FOR ALL ISSUES

Total Amount: 2,767.50
 Estimated Tax: 0.00
 Estimated Total: 2,767.50

Line Details Adjustments

Select an Event Date to Add

Issue Date	Material	Material Status	Billing Amount	Current Imps.	Current Clicks	Current as of	Actual Imps.	Actual Clicks	Invoice ID	External ID	Credit ID	Credit	Delete
3/19/2021	927		2,767.50	0	0		1	0					

2,767.50 0 0 1 0

View Production Schedule Delete this Line Cancel Save Changes

- ii. Open the “Select and Event Date to Add” drop down and a list of dates will appear.
- iii. Select the new date
(unavailable dates will be greyed out and unclickable)

EDITING FLAT FEE LINE: 1047

Ratecard: PAN - Facebook - NM2021
 Description: MP: 20000-25000

Proportion Values: Evenly by Issue

Adjusted Flat Fee: 2,767.50

TOTAL FOR ALL ISSUES

Total Amount: 2,767.50
 Estimated Tax: 0.00
 Estimated Total: 2,767.50

Line Details Adjustments

1 Select an Event Date to Add

Select	Date	Day	Max Allowed	Quotes	Reserved Orders	Confirmed Orders	Available Qty
<input type="checkbox"/>	3/19/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	3/26/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	4/2/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	4/9/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	4/16/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	4/23/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	4/30/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	5/7/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	5/14/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	5/21/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	5/28/2021	Friday	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	6/4/2021	Friday	N/A	N/A	N/A	N/A	N/A

2

2,767.50 0 0 1 0

View Production Schedule Delete this Line Cancel Save Changes

- iv. Click the plus sign to add it to the line item.

Estimated Total 2,767.50

Select an Event Date to Add 4/9/2021

ent as of	Actual Imps.	Actual Clicks	Invoice ID	External ID	Credit ID	Credit	Delete
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- v. Click save Changes

Line Details Adjustments

Select an Event Date to Add

Issue Date	Material	Material Status	Billing Amount	Current Imps.	Current Clicks	Current as of	Actual Imps.	Actual Clicks	Invoice ID	External ID	Credit ID	Credit	Delete
4/9/2021			2,767.50	0	0		0	0					

2,767.50 0 0 0 0

View Production Schedule Delete this Line Cancel Save Changes

- vi. Click OK

Note: You'll need to change dates for things like extensions and add ons if you're changing the dates of an eblast

Editing Products:

If you need to adjust the type of eblast or audience size (ex - Facebook 15K+), you will need to delete the line item and re-add with the correct type using quick line entry ([click here for those instructions](#)).

Banner Ads (Our site and 3rd Party), Pre-Roll Video, Native Ads on 3rd Party

You can adjust both the desired impressions and the start/end date.

1. **In the tree:** Click Line Items
2. **Open the line item:** Click the line item number to open the product you are adjusting

	Position: PFWWEBNAT	
1049	HCP - Banner Ads on HCP.com	IMU
	Size: IMU (300 x 250)	

3. **To adjust the impression count:** Enter the corrected impression count.
4. **To adjust the Start and/or End date:** Enter the new dates in the appropriate fields.

EDITING COST PER THOUSAND LINE: 1049

Pricing Details	Other Options	Creatives / Materials	Production Notes	Rep Assignments
Product	HCP - Banner Ads on HCP.com	Dimension(s)	IMU (300x250)	Ratecard CPM Rate
Ad Type	CPM	G/L Type	Digital	Adjustments
Contract		Material Status		Discount Rate
Ratecard	HCP - Banner Ads on HCP.com -NM2021			Estimated Impressions
Ratecard Line ID	793			Estimated Amount
Description	IMU			Estimated Tax
				Estimated Total

Line Details	Tracking Services	Adjustments	User Defined Fields	Category MetaData										
Start Date	5/1/2021	End Date	4/30/2022	Total Days										
				365										
				Proportion Values										
				Evenly by Month										
Month	Days	Available	Estimated Imps.	Estimated Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Actual Amount	Invoice	Credit	Credit
May 2021	31	0	1,667	192.30	0	0	0		0	0	0.00			
Jun 2021	30	0	1,667	192.30	0	0	0		0	0	0.00			
Jul 2021	31	0	1,667	192.30	0	0	0		0	0	0.00			
Aug 2021	31	0	1,667	192.30	0	0	0		0	0	0.00			
Sep 2021	30	0	1,667	192.30	0	0	0		0	0	0.00			
Oct 2021	31	0	1,667	192.30	0	0	0		0	0	0.00			
Nov 2021	30	0	1,667	192.30	0	0	0		0	0	0.00			
Dec 2021	31	0	1,667	192.30	0	0	0		0	0	0.00			
Jan 2022	31	0	1,667	192.30	0	0	0		0	0	0.00			
Feb 2022	28	0	1,667	192.30	0	0	0		0	0	0.00			

**** Entering new dates/times and/or impression count will automatically adjust the pricing.**

5. Click Save

Production Form - PAN Audience Specific

If you have a PAN Product (Banner Ad 3rd Party/PR/FB/LI/Direct Mail)

1. **Select Campaign Production Forms:** Click on **Campaign Production Forms** in the tree

Campaign Explorer

- Campaign
 - Campaign Setup
 - Line Items
 - Edit CPM Delivery
 - Campaign Budget
 - Campaign Production Forms**
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes
 - Go to CRM View
 - Go to Advertiser View

2. **Select Production Form:** Select the production form from the list by clicking the form name. (Please note: Reps will only complete forms with the word “CATEGORIES” in it.
 - a. **Form Status - Form Not Started** - Nothing has been done yet
 - b. **Form Status - Form Started, Required Data Missing** - Form was started, but not all required fields have been filled out. (example - if you only pick two of the three leaders categories available)
 - c. **Form Status - Form Completed** - This means all required fields are completed and the form is ready to go.
3. **For PAN,** we adjusted the fields to be filled in.
 - a. **Audience Requested - Do not enter until CSM Approved If a Custom/Combined Audience** - Type the Audience in this field:
 - i. If you are selecting an audience straight from the [PAN Dashboard](#), CSM approval is not needed.
 - ii. If you are requesting a custom/combined audience, approval is needed before you proceed.
 - b. **Has this Custom Audience been approved by the CSM?** - Select Yes/No.
***Audience is not guaranteed until CSM approves*
 - c. **Approval Date** - Date approved by CSM

Field	Value	Required
Audience Requested - Do not enter until CSM Approved If a Custom/Combined Audience		<input checked="" type="checkbox"/>
Has this Custom Audience been approved by the CSM?		<input type="checkbox"/>
Approval Date		<input type="checkbox"/>

- d. Click Save

Production Contacts

1. **In the tree:** Select Production Contacts
2. **Link a Contact:**
 - a. Open drop down, select desired contact
 - b. Type in Role - (Not case sensitive, but needs to be one of the below)
 - i. Digital
 - ii. Print
 - iii. Both
 - c. Click “+”
3. Repeat if there is more than one contact.
4. Save

Campaign Explorer

- Campaign
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 - Edit CPM Delivery
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 - Campaign Production Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts**
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes
- Go to CRM View
- Go to Advertiser View

Campaign Contacts

Campaign ID: 170 Start Date: 3/13/2021

Advertiser: Sealed Air Food Care End Date: 6/24/2022

Brand: Sealed Air Food Care Net Amount: 16,678.80

Agency: Status: Proposal In Progress

Production Contacts

Name	Company	Role	Products	Phone	Email
-- No Records --					

Link a Contact: Create a New Contact

1. Click Dropdown

Enter this Contact's Role 2. Type Role

3. Click Plus

ID	Name	Company	Email
100985	Margaret Yanez	Sealed Air Food Care	
102210	Jenn Brink	Sealed Air Food Care	
107111	Joey Sanchez	Sealed Air Food Care	jsanchez@morrisagency.com
107112	Kristen Frame	Sealed Air Food Care	kristen.frame@sealedair.com

Cancel Save

Attachments/Links

- In the tree:** Select Attachments
- For an Attachment:**
 - Type The Description
 - Select your file
 - Click “+”
- For a link**
 - Type Description
 - Paste link
 - Click “+”
- Repeat if there is more than one attachment/link.
- Click Save

Main Menu: Home, Sales Activity, Product/Group Analysis, Product Analysis, Publication Analysis, Campaign Budget Analysis, Digital Delivery, PinPoint, Advertiser Ranking, Commissions

CAMPAIGN ATTACHMENTS

Campaign Explorer

- Campaign
 - Campaign Setup
 - Line Items
 - Edit CPM Delivery
 - Campaign Budget
 - Campaign Production Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts
 - Attachments**
 - Invoices & Payments
 - Rep Commissions
 - History of Changes
- Go to CRM View
- Go to Advertiser View

Campaign Attachments

Campaign ID: 172 Start Date: 3/13/2021

Advertiser: Sealed Air Food Care End Date: 12/31/2021

Brand: Sealed Air Food Care Net Amount: 0.00

Agency: Status: Proposal In Progress

Attachments

Attachment	User	Date	Time	Details
-- No Attachments --				

Enter a Description of the New Attachment

Select File

Links

Description	Link URL	User	Date	Time	Remove
-- No Records --					

Enter a Description of the New Linked Item

Enter a URL (e.g. http://mywebsite.com/my_document.pdf)

Sending a Proposal:

1. **In the tree:** Click Campaign Setup
2. **Signature Template** - Select the appropriate template

***For training, just use the first option “e-sign template: Billed as Run”. The rest of our templates are still in development.*

3. **Ready to Sign** - Click the checkbox. This will turn the field to “Yes”
4. Click Save

The screenshot shows a form with three main sections. The first section, 'Signature Template', has a dropdown menu currently set to '[E-SIGN TEMPLATE] - Billed As Run'. The second section, 'Ready to Sign', features a checkbox that is checked, with the word 'Yes' displayed next to it. The third section, 'Signature Received', has an unchecked checkbox with the word 'No' next to it. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular box.

5. **In the tree:** Click Generate Proposal/Confirmation
6. Click “Send a Proposal”

The screenshot displays the 'Campaign Explorer' sidebar on the left, which lists various campaign management tasks. The 'Generate Proposal/Confirmation' option is highlighted with a red box. A red arrow points from this option to the 'Send a Proposal' button in the 'Confirmations' section. The 'Confirmations' section shows details for Campaign ID 172, including Advertiser (Sealed Air Food Care), Brand (Sealed Air Food Care), Agency, and Status (Proposal In Progress). It also displays Start Date (3/13/2021), End Date (12/31/2021), and Net Amount (0.00). Below this, there is a table titled 'Previously Generated Documents' with columns for Confirmation No., Created By, Date Created, Emailed To, Sent by, Sent on, Sent at, and Resend. The table currently shows 'No Records'.

7. A Generate Email/PDF window will open.
 - a. **Email to:** The very top box will be ALL the contacts associated with this account in SalesForce. In the **LIVE** environment, you would select the contact(s) that should receive the proposal. **DO NOT USE DURING TRAINING, IT WILL SEND EMAILS OUT!**
 - b. **Other To:** You can add other email addresses here. **THIS IS WHAT YOU USE TO SEND TEST PROPOSALS DURING TRAINING.** In this field, add:
 - i. Your email address
 - ii. Alicia (for homework)
 - iii. Your CSM
 - c. **Send separate emails to each recipient:** Select if you want each recipient to get their own email. We don't recommend using this, but it is an option.

d. **Subject Line** - This is the email subject line and should be updated with what you would normally send a client. Example: “2021 PACK EXPO Las Vegas Proposal”.

e. **Sending the actual proposal:**

- i. If you want to send the proposal as the ACTUAL Email body, you have entered everything you need and can click “Email (HTML)”
- ii. If you want to send the proposal as a PDF attachment, you will fill in your email message in the “**Email Body (if using a PDF attachment)**” and then click “Email (PDF)” to send.

***Make sure you have filled in the field before clicking, or the client will get a blank email with the attachment.*

The screenshot shows a web form titled "GENERATE EMAIL / PDF". It has two tabs: "Parameters" (selected) and "View / Edit Document".

Parameters Tab:

- Email To A:** A table with columns: From Salesforce, Contact, and Email. It lists four contacts: Melania Craddock, Scott Thomas, Ronald Cotterman, and Kristen Frame. Each row has a checkbox in the "From Salesforce" column.
- Other To B:** A text area containing three email addresses: Jennifer Brink (jbrink@pmmimediagroup.com), Zanzu Begoun (abegoun@pmmimediagroup.com), and Alicia Pettigrew (apettigrew@pmmimediagroup.com).
- Send separate emails to each recipient C:** A checkbox that is currently unchecked.
- CC:** An empty text field.
- Subject D:** A text field containing "Campaign Order 170".
- Attachments:** A section with a paperclip icon.
- Email Body (if sending a PDF attachment):** A large text area containing the red text: "Only use body with Email (PDF) option".
- Buttons E:** A row of buttons: "Cancel", "Download (HTML)", "Download (PDF)", "Email (HTML)", and "Email (PDF)".

Red boxes highlight the "Email To" table, the "Other To" field, the "Send separate emails" checkbox, and the button row. A blue box highlights the "Subject" field.

f. Your proposal is on the way, you should get a copy in your inbox if you added your email in one of the mentioned fields.

8. Update the status of the Campaign to “Proposal Sent”

a. In the tree: Click Campaign Setup

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint Advertiser Ranking Commissions

EDITING CAMPAIGN 172

-- Select an Edit Option --

Campaign Explorer

- Campaign
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- Attachments
- Invoices & Payments
- Rep Commissions
- History of Changes
- Go to CRM View
- Go to Advertiser View

Campaign Setup

Campaign ID: 172

Campaign Billing Type: Performance Campaign

Campaign Description: Sealed Air Production Test

Advertiser ID: 100918

Advertiser Name: Sealed Air Food Care

Advertiser Address: 2415 Cascade Pointe Boulevard
Charlotte, NC 28208
Tel: 864 433-2000

Brand: Sealed Air Food Care

Agency / Bill-to:

Billing Contact: Kristen Frame

Billing Address: 2415 Cascade Pointe Boulevard
Charlotte, NC 28208
Tel: 864 433-2000

Product Group: All Products Group

Start Date: 3/13/2021

End Date: 12/31/2021

Run until cancel: No

Gross Amount: 3,240.00

Commission Amount: 0.00

Net Amount: 3,240.00

Estimated Tax: 0.00

Estimated Total: 3,240.00

Currency: Use System Default

Default Discount %: 10.00

Auto Payment Method: Manage Cards on File

Default Contract: Payment is due Net 30 from the date of invoice

Payment Terms: Payment is due Net 30 from the date of invoice

Status: Contract Signed

b. In Edit Option Dropdown - Select “Change the Status of the Campaign”

-- Select an Edit Option --

- Cancel this Campaign
- Change Agency / Agency Percentage
- Change Campaign Ending Date
- Change Terms
- Change the Campaign Type
- Change the Order Sales Rep(s)
- Change the Original Sales Rep(s)
- Change the Status of this Campaign**
- Changing Billing Contact/Address
- Re-Sync to Ad Server(s)

c. Select “Proposal Sent”

d. Click Change Status

CHANGE CAMPAIGN STATUS

Current Status: Proposal In Progress

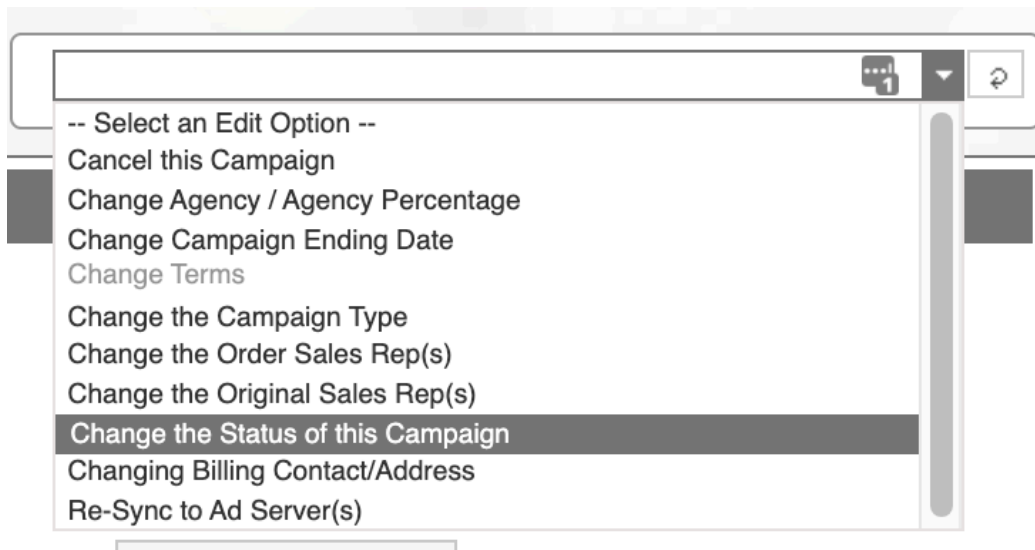
New Status: Proposal In Progress

CAMPAIGN STATUS MESSAGES

Type	Message
-- No Messages --	

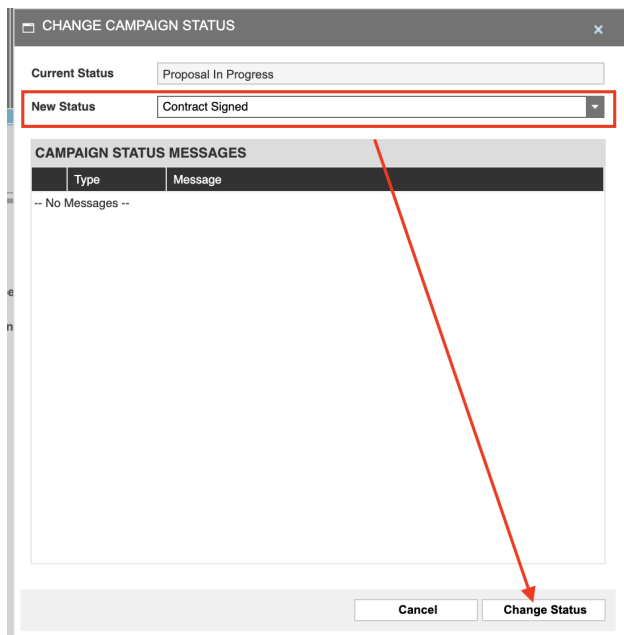
Cancel Change Status

2. In **Edit Option Dropdown** - Select “Change the Status of the Campaign”



3. **Select** “Contract Signed”

4. Click Change Status




5. Click Save (just in case)
6. Add Proof of Approval in the attachment section (Examples: IO from Agency, Email from client) ([Click here for instructions](#))

Client Approval:

1. This is what the Client will see when a proposal is sent. They will click “Click Here to Approve This Proposal Online”. We will go through the Client’s steps at a later date.

Campaign Order 172



Insertion Order

Today's Date: 13 Mar 2021

Digital Materials: _____

Print Materials: _____

Send Leads To: _____

Sales Rep: Daniel Smith

Bill-to

Sealed Air Food Care
2415 Cascade Pointe Boulevard
Charlotte, NC 28208
Account No: 100918

Advertiser

Sealed Air Food Care
2415 Cascade Pointe Boulevard
Charlotte, NC 28208
Account No: 100918

Campaign Summary

Campaign Number	172
Description	Sealed Air Production Test
Campaign Dates	3/13/2021 - 12/31/2021
Entered Date	

Cost Summary

Base Amount	\$3,600.00
Adjustments	\$-360.00
Total	\$3,240.00

All Prices: NET
Bill as Booked
All plans subject to final publisher approval.

Automation World

Product	Product Details	Package Name	Start Date	End Date	Quantity	Price Each	Total Price
AW - Automation World Magazine	1/2 Page Island		10/15/2021	10/15/2021	1	3,240.00	3,240.00

Billing: Payment is due within 30 days of receipt of invoice. Advertiser agrees to payment terms and conditions as specified [HERE](#)
Newsletter distribution numbers fluctuate, and the distribution at the time of send may be higher or lower than what was initially quoted. Have a question? Need help? Start with [Courtney Nichols](#)

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