

Creating New Insertion Order

Table of Contents

- a. [Link to Main Section 1](#)
- b. [Link to Main Section 2](#)
- c. [Additional Instructions](#)
- d. [Other Details](#)

Overview of the SOP - The purpose of this document is to walk sales reps through creating a new insertion order for their client. Insertion orders are used as contracts to outline purchased materials and agree

Resources {Heading 1}

<https://www.adorbit.com/>

Main Section 1 {Heading 1} - [This is a simplified set of instructions for the SOP. Helpful to reference when someone is already familiar with the details but just need a reminder.]

1. Pull up Company in AdOrbit
2. Click add new order
3. Fill in necessary Fields
4. Make sure to add in necessary notes that are required.
5. Click Save And Continue
6. Use Crittenden Research Inc Template
7. Save the order and click "approve order"

Main Section 2 {Heading 1} - [This is a more detailed set of instructions dedicated to the SOP. These directions should show and walk an employee through a process with little to no previous experience.]

1. Open Ad Orbit
 - a. Under global search, search for the company you are needing to create the insertion order for.
 - b. After clicking enter, select the “**companies**” tab, and select the company
 - c. Go to “**orders**” Tab. Click button that says “**add new order**”. Make sure the primary contact is selected, and confirm billing contact is also selected. (If billing contact is unknown, select primary contact.)

Create Order

Contact Info

Forecasting

Products

Billing and Notes

Review and Send

Client Information

Client *

Randal Test x

Parent Company

Agency

Contact Information

Primary *

Randal Johnson

Print Artwork

—

Digital Artwork

—

Billing *

—

Sales Rep *

Membership Team

Save and Continue Editing

- d. Select the appropriate “**sales rep**”.
- e. Click “**Save and Continue.**”
- f. Leave “**Forecasting**” page blank, then click “**save and continue**” again

- g. Under “**products**” all products are found under “**Print Ad Sales**”

Edit Order #7941 - Randal Test

Contact Info

Forecasting

Products

Billing and Notes

Review and Send

Products

— Actions —

+ Add Item beta ?

+ Print Ad Sales ?

+ Digital Ad Sales ?

+ Service Sales ?

+ Event Sales ?

Total

\$0.00

Save and Continue Editing

- h. Select “**Print Ad Sales**”, and “**Publication**”. (Golf Inc, NJ, Prelaw)
- i. Select rate card. (you can only select what is available in the drop down. Typically, the current year)
- j. Select the appropriate issue. This will be found in the right hand column under “**Schedule Section, issue**”
- k. Select “**Ad Size**” under “**Ad Details**”
- l. If a discount is needed due to them booking multiple issues, this can be done by selecting frequency drop down menu, and changing it to whatever issue is being ran.
- m. This will then change the issue.
- n. Add notes is only needed if there are special notes from the client.

- o. If company is requesting specific placement, you can list the placement in the notes.

Edit Order #7941 - Randal Test

Contact Info

Forecasting

Products

Billing and Notes

Review and Send

Notes

Notes on the Bottom of the Order

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, code, image, link preview, and table. A "Formats" dropdown menu is also present.

enter specific notes here

Billing

Purchase Order Number

Credit Card 

— Select a Credit Card —

ACH Account 

— Select ACH Account —

Special Billing *

☒ No ☐ Yes

Internal Comments

Enter notes to only be seen internally, here.

Save and Continue Editing

- p. Select Save
- q. If creating a large contract, click the “plus sign” and add everything needed to be sold by completing these steps.
- r. After all products are listed, select “save” and continue editing.
- s. Put in notes for bottom of the order if needed.
- t. If special billing is needed for the company, select “yes”, and add note under internal comments section, noting the special billing.

u. Click “Save and Continue”

v. Select “Crittenden Research Inc” template

Review and Send

Template *
Crittenden Research Inc. ☐ Display Signature Name

7941.pdf 1 / 2 76%   


1

CRITTENDEN RESEARCH, INC.
3544 E 17th St, 201
Ammon, ID 83406
Accting: 986-497-0104
Fax: 877-300-2232

Advertiser:
Randal Test
#3432

Insertion Order
Contract Number: 7941
Date: 11/01/2023

Sales Rep Name and Info:
Membership Team
(800) 857-1916
membership@crittendenresearch.com

w. Select “Save Order”

x. When Complete, order will appear on “order” screen.

y. Next, hover over the order, select three dots on the right hand side.

z. Click “submit for publisher approval”

Below is an example of a completed insertion order used

CRITTENDEN RESEARCH, INC.

3544 E 17th St, 201
Ammon, ID 83406
Accting: 986-497-0104
Fax: 877-300-2232

Insertion Order

Contract Number.

Date: 10/20/2023

Advertiser:

Sales Rep Name and Info:

Mindy Palmer
(931) 484-1727
mindy@cypressmagazines.com

"

5

We, the Advertiser, agree to purchase the following advertising space according to this Advertiser Agreement and subject to the terms and conditions specified herein. We agree to pay for any production costs incurred in addition to the charges listed.

	Date 10/23/2023	Customer Signature Anastasia Claxon	Date
Representative Mindy Palmer			

Please verify and mail, email or fax completed agreement before issue closing date.

Issue	Frequency	Ad Size	Ad Notes	Total Cash
GI September 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00
Golf Inc Design Guide	2x	Birdie		\$800.00
GI January/February 24	1x	1/4 page		\$2,250.00
Golf Inc Management Guide 24	2x	Birdie		\$800.00
GI May 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00
GI June 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00
GI July 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00
GI August 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00
GI October 2024 Digital Sponsorship	6 months	Flagship Digital Sponsor		\$800.00

Service Sale Total: \$0.00