

Ad SalesTM 4

Ad Management Software for the Publishing Industry

Ad Sales 4 is a complete, cross-platform display ad sales management solution for the publishing industry. A single solution manages client histories and communications, multi-ad contracts, individual insertion orders, rate cards and sales commissions, and provides a wide range of management reports.

Complete Feature List

General

- Single, integrated solution that replaces separate calendar, contact management, and contract management applications.
- Mac OS X® 10.4.9 or higher; Windows® XP or Vista (new in Ad Sales 4.1).
- Multi-user, client/server architecture based on FileMaker® Server 9.
- Integrated system backup scheme.
- Integrated wiki-style help module.
- Extensive context-sensitive tooltips.
- System modules: calendar, contact management (accounts and agencies), contracts, insertion orders, tasks and activities, issue and deliveries.
- All modules are accessible using button bar at top of every screen.
- QuickFind in all modules using major attributes or search for records using the current layout with Find by Form.
- Ad Sales 4 controls user access to system features through group memberships. Groups include admin, management, traffic, account executive, and marketing.
- Print current found set of records from any list screen.
- Back button on all screens goes to previous screen.
- Users can set and change their own system passwords.
- Multiple users can share the same computer using Re-Login feature.

Contact Management

- Manage all accounts and advertising agencies.
- Relate one or more agencies to a particular account and identify a default agency for contracts and insertion orders.

- Manage individual contacts and relate contacts to accounts or agencies.
- Maintain separate account mailing and billing addresses.
- Maintain account and agency credit information.
- Isolate subsets of records with Group and Individual flags.
- Identify records for sales campaign or other reasons with the Tag field.
- Create new contracts from the account record and access existing contracts from either the account or agency record.
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- Identify default currency for account (Ad Sales 4.1).
- Tasks/Activities portal to manage interaction with accounts, agencies and contacts.
- Send emails to account and agency contacts directly from within Ad Sales 4.
- Print account and agency lists and labels.
- Export account and agency addresses in Excel format.

Contracts

- Generate multiple contracts per account.
- Identify account contact, agencies, and agency contact for current contract.
- Attach multiple insertions to a single contract and access insertions from contract detail screen.
- Guarantee an exchange rate for the length of contract (if desired) and record currency exchange rates at the beginning and end of contract period (Ad Sales 4.1).
- Create new insertions quickly based on previous insertions.
- Track contract progress, including total insertions and contract revenue to date.
- Identify contracts that will not finish on time and need to be short-rated.
- Modify contract size and issue revised contracts as needed.

Insertion Orders

- Generate one or more insertions related to one contract or create a one-time insertion.
- Insertion types for print ads, online ads, and events (Ad Sales 4.1).
- Identify account contact, agencies, and agency contact for current insertion only.
- View current rate card details from within insertion order.
- Base ad rates are entered automatically based on publication, rate card, insertion type and size.
- Override base ad rates and add additional charges and discounts as necessary.
- Store insertion order totals in euros, pounds and/or dollars based on current exchange rates at time of booking or contract exchange rate (Ad Sales 4.1).
- Identify non-revenue insertion types (make goods, house, trade, etc.).

- Note competitive separation.
- Mark individual insertion orders for prepayment.
- Email contracts to account or agency directly from within Ad Sales 4.
- Traffic and/or management controls runsheet status. An insertion order that has been OK'd for the runsheet is locked from further edits.
- Create records for delivery of issue copies to accounts, agencies and others from within insertion order record.
- Track final position in issue.
- Navigate directly between the current insertion order and the account, agency or contract records associated with it.

Tasks and Activities

- Record all communications (estimates, invoices, emails, phone calls, etc.) with accounts and agencies.
- Create tasks with deadlines for users.
- Each user can check his/her own outstanding tasks using the My Tasks button or menu command.
- Navigate between tasks/activities and related accounts, contracts, and insertions.

Issues

- View lists of past and upcoming issues for a single publication or all publications.
- Issue detail screen shows statistics (total ads, ad pages and revenue) for a single issue.
- Add issues to the calendar.
- Set ad deadlines on an individual issue basis.
- View and access all insertions related to current issue.
- View and access delivery records for the current issue.
- Print or export delivery records for current issue
- Indicate special issues and parliamentary session status.
- Print issue runsheets with insertion orders grouped by size.

Calendar

- Weekly and monthly formats.
- Issue and task/appointment views.
- Low and high-resolution monitor views (Mac OS X only).
- Calendar entries color-coded by parliamentary session status.
- Color-coding indicates current and selected dates.
- Filter calendar entries by issue status or publication.

- Navigate directly to individual issue, task and appointment detail screens.

Reports

- A special Reports menu includes all possible reports.
- The Ad Sales 4 security scheme controls access to reports based on user login.
- Each report directs the user to choose the proper publication, record set, sort orders, and print format.
- Reports can be calculated in euros, pounds, or dollars based on current exchange rate or rate at time of booking (Ad Sales 4.1).
- Reports can be printed or saved in PDF format.
- Reports include:
 - Query result list reports
 - Dailies by issue and account
 - Account Executive Totals by ad type and status
 - Sales Analysis by issue, day of week, and parliamentary session status
 - Non–Revenue Insertions by type
 - Issue Summary and Insertion Status by issue
 - Period Revenue Comparisons by account executive, category or account
 - Top Account and Agency Spenders by publication and date range
 - Contract Status and 6/11 Month Reports
 - Page and Position in book by account or account executive
 - Account Activity (total sales, average ad size and position, etc.)
 - Monthly Commission Report (Ad Sales 4.1)

Administrative Tools

- Admin Tools screens exist for company information, default agency discounts and current exchange rates (Ad Sales 4.1), and email settings as well as:
- Users – Create/activate/deactivate/delete users, set their default calendar screens and user group memberships. Set up commission rates on a per account executive basis (Ad Sales 4.1).
- Default Values – Edit the postal code list and create account types and contact.
- Publications and Rates – Work with multiple publications. Set publication headers for contracts and insertion orders. Create and print multiple rate cards per publication.
- Budgets – Set monthly sales goals by publication, ad type and account executive.



System Requirements

Client Workstation – Mac OS X 10.4.9 or greater or Windows XP Professional SP2/Vista (new in Ad Sales 4.1); G4, G5, or Intel Mac or Pentium 4 or greater PC; 512 MB RAM or greater; 100BT network interface card.

Server – Mac OS X 10.4.9 or greater or Windows 2000/2003 Server; 2 GB RAM or greater; 100BT/Gigabit network interface card.

Customization and Support

Ad Sales 4 is available in a multi-user client/server configuration for maximum performance and security. Ad Sales 4 can be customized to meet the needs of your individual operation, and a range of ongoing support options is available. Call for complete pricing and support options.



95 Horatio Street
Suite 318
New York NY 10014 USA
t: +1-212-929-9775
www.colibrisolutions.com
info@colibrisolutions.com