ExampleApp Users Guide

Revision 1.00
Last Modified: 06/20/12

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2 Introduction

This document is a handbook for the average user of ExampleApp. It guides users through common and critical tasks. The Users Guide does not cover all components of the software, but is intended to be a first-stop reference for everyday use.

ExampleApp offers a fresh outlook and a user friendly environment for users to explore and understand their client performance. It offers a data-rich, customizable dashboard as a jumping-off point into ExampleApp reports and functionality.

3 Management

3.1 Managing Contacts

Keep track of your contacts using the *Contacts* tool. The tool allows you to add, edit, and review customer information. In order to create a new collaboration order, enter the customer into the database using this tool.

To add a new contact, click the **New Contact** button and fill out the contact's details.

3.2 Finding an Existing Order

To find an existing order, go to the *Order Search* screen. Use the search criteria to narrow the displayed list of orders. The *Keyword* criteria will search the *Customer*, *Purchase Order Number*, and the *Order Name*.

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When you locate the order you are looking for, you can open the *Order Screen* by clicking on the order's name or you can go directly to one of the order's line items by expanding the view (by clicking on the **>**) and then selecting the line item.

3.3 Creating a New Order

Orders are hierarchical containers for line items stemming from the same contract or PO. To create a new order, go to the *New Order* tool. Enter a unique name for the order. No two orders can have the same name.

Select the customer from the dropdown. If the customer does not exist, create a new record using the *Contacts* tool (See section 3.1)

Click the **Save** button to create the order.

3.4 Creating a Line Item

Add a new line item by selecting **Add Line Item** from the *Order* screen. You can also add new line items to an order from the *Order Search* screen using the **+** icon.

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The Line Item configuration screen is divided into multiple tabs. You must set up at least the *Details* tab and the *Billing* tab. After editing data, click the **Save** button to create the line item and retain the changes. You must complete all required fields to save the data.

3.4.1 Setting up a Line Item's Details

1. Enter a name for the line item. Line item names must be unique.

2. Set the *Price*. This is the base price charged to the customer per *Revenue Type*.

3. Set the start and end *Dates* of the contract.

4. Set the *Line item Type*.

5. Set the *Guarantee* and *Budget*.

6. Set the *Revenue Type*.

7. If the contract is new, set *Sale Type* to **New Business**. Otherwise, if it is the continuation of a previous contract, set it to **Renewal**.

8. Set the necessary contract flags as detailed in the purchase order.

3.4.2 Setting up Inventory Exchange

Use the Inventory Exchange tab to set up the line item to deliver to partners over the Inventory Exchange. Depending on your organization's corporate relationships, you can offer your contracts to partners as a subcontract. Your partners are able to accept or decline the subcontract.

Selecting a partner from the list enables its fields. Set the details for the subcontracting offer. *Price* is the amount that is paid to the other network per unit delivered. *Fees* is an assessed cost paid to Company per unit served over the exchange. *Final Run Price* is the amount the delivering subcontractor is paid per unit delivered after fees are assessed.

Once a partner accepts a subcontract over the exchange, you are unable to change the *Price*. However, you can cancel the subcontract at any time by unchecking the partner.

3.4.3 Setting up Billing

Before activating a line item, you must set up the billing information on the Billing tab.

1. Set the *Invoice Timing* field to match your desired billing period:

   - **Bill Once** sends one invoice at the end of the campaign.

   - **Monthly by Date** sends invoices at periods of thirty days starting with the first day of the campaign.

   - **End of Month** sends invoices on the last day of each month.

2. If *Invoice Timing* is set to **End of Month**, you can check the *Invoice Combination* field to combine the first two or the last two billing periods. This prevents the client from getting billed for small time period from contracts beginning or ending in the middle of a month.

3. Set the *Allocation* field to match the desired product delivery handling:

   - **Periodic –** Ensures product delivery according to the receipt schedule, regardless of available production.

   - **Complete –** Delivers the product as it is available.

4. For **Monthly by Date** or **End of Month** invoice timing, divide the *Guarantee* between the billing cycles. The default is an even distribution by time.

3.5 Generating Documents

To generate a *Work Order* document, *Demographics Report* document, *Targeting Report* document, or *Site IO* email, go to the *Summary* tab on the line item. This tab is available after the line item has been activated.