



Marketron

Getting Started With Invoice Express

Visual Traffic



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Frequently Asked Questions

What is an “electronic invoice”?

For years, most traffic and billing software has produced invoices by printing them onto paper. An **electronic invoice** is an invoice that is not printed to paper at all. Instead, the invoice data is put into a particular format, and then transmitted electronically. Not surprisingly, the simplest format of electronic invoicing is via **E-mail**. (All you need is internet access and an e-mail account.) But there are also **other formats** that allow your invoice data to be transmitted and integrated seamlessly into the accounting and payables systems in use at many agency and production houses around the world.

What are some benefits of electronic invoicing?

- **Save paper costs** – Electronic invoicing means less paper and/or forms consumption.
- **Save postage costs** – Fewer paper invoices means less postage used to mail them.
- **Save time** – Every electronic invoice you generate means one less printed invoice that needs to be sorted, folded, stuffed into an envelope, and mailed. Electronic invoices can reach the advertiser/agency within minutes of being generated. The sooner they receive your invoice, the sooner you may get paid.

What changes will Invoice Express make to my traffic and billing system?

Invoice Express is installed as a **separate** application, apart from your traffic and billing system. Your traffic and billing system generates the invoice just like always, except that some will go to paper, and others will go to the Invoice Express product. Invoice Express facilitates and controls the distribution of the electronic invoices. Along with the Invoice Express application, your traffic and billing system will also receive an update. This update simply adds a few new options, so that you can specify whether an order should be invoiced electronically or not, and if so, in what **format** it should be. Of course, you can still generate paper invoices for any or all advertisers you want, just the same as you do now.

How does the electronic invoicing process work?

When you generate invoices, your traffic and billing system will see which advertisers/agencies you have instructed to receive electronic invoices. For these advertisers/agencies, instead of printing this invoice to paper, the data is sent to a file. The Invoice Express application takes over from there. Invoice Express sees this data, and sends it to a computer on your network that actually transmits the data to the recipient. (This could be the same PC that was used to generate the invoice, or another PC on the network.) The data then gets sent via the internet. Request a copy of the Invoice Express Hardware Specifications sheet for more detailed information on hardware requirements. Generally speaking, however, the computer used to transmit the data does not need to be a “powerhouse” computer.

What other electronic invoicing formats are supported?

Advertising agencies in particular will most likely prefer to receive electronic invoice data in a format that is directly compatible with their accounting and payables systems. Obviously, there are many different systems in use by all the different agencies. Thus, there are many different data formats that work with each system.


Why might there be added costs to send data to agencies in other formats?


Rather than force you to keep track of exactly what format is needed for each and every advertiser/agency, and to change those settings every time an agency or advertiser changes, it's much easier and more efficient to send your data through a **clearinghouse**— an organization whose

sole purpose is to handle the exchange of electronic information between you and the agencies. A clearinghouse makes sure your data is put into the correct format needed by all the various agencies with which you do business. For this to happen, you do need to subscribe to the clearinghouse's services. This is where extra cost may come into play. Fortunately, there's good news on this front. **Marketron Broadcast Solutions** has teamed up with **eMediaTrade, Inc.** to create an electronic data clearinghouse of our very own, designed with you in mind. We call it **AgencyMinder.com**. AgencyMinder.com provides the electronic data exchange with over 1300 agencies, and provides you with a private internet website you can access to track the status of each exchange. Marketron and eMediaTrade created AgencyMinder.com with the goal of keeping end-user costs down.


💡 **FYI** - There is no additional charge to Marketron customers to use AgencyMinder.com's services.

Invoice Express Installation

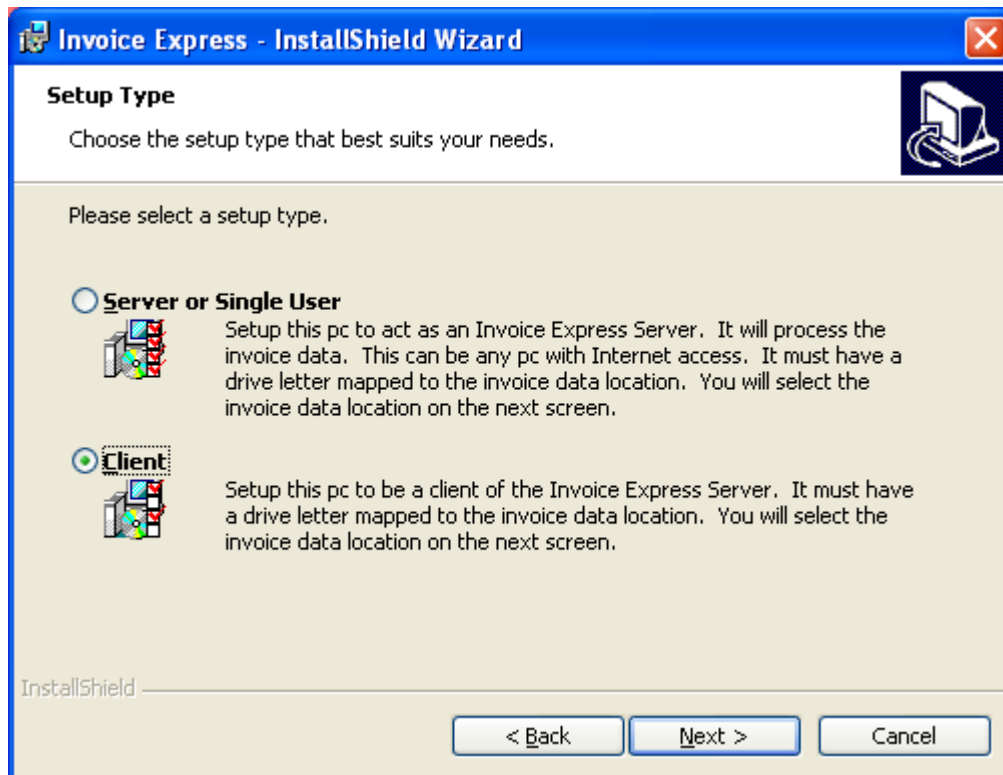
 **FYI** - Pay close attention to the Invoice Express installation screens as they may differ depending on several factors.

 **IMPORTANT** - These instructions refer to a "server" and "client" setup for the Invoice Express product. Do not confuse these with your VT server computer. In nearly all cases, the Invoice Express "server" will be one of your VT **client** machines. We do not recommend installing the Invoice Express "server" on the VT server. You will need to install a "Client" installation of Invoice Express on the VT server.

1. On the VT server, launch the Invoice Express installation. The Invoice Express Setup Type screen displays allowing you to select a setup type. Select the **Client** option and click on the Next button to continue.

 **FYI** - You may see a screen that says a **previous installation** of Invoice Express has been detected. Click the Yes button and then the Next button to remove the previous installation and continue with the new installation.

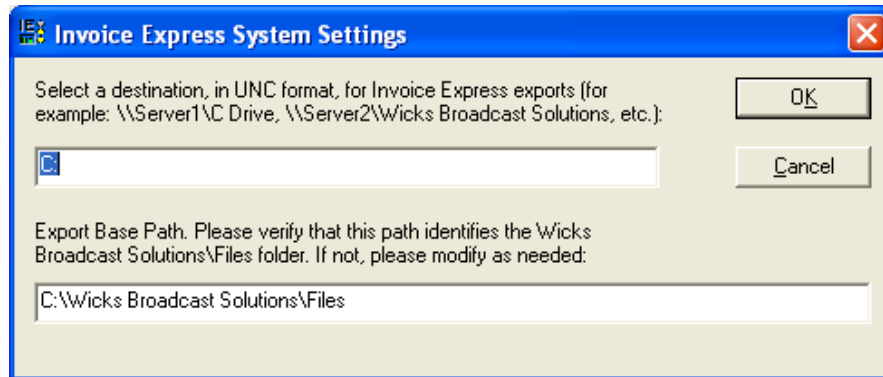
Sample Invoice Express Setup Type Screen



2. When the installation process is finished, click on the Finish button.

3. Setup the export path in VT:
 - A. Login to the VT Utilities and under the Setup option select the Invoice Express option.
 - B. Enter the drive letter where VT is installed. Usually the VT installation drive is C:\.
 - C. Click on the OK button to save the settings.

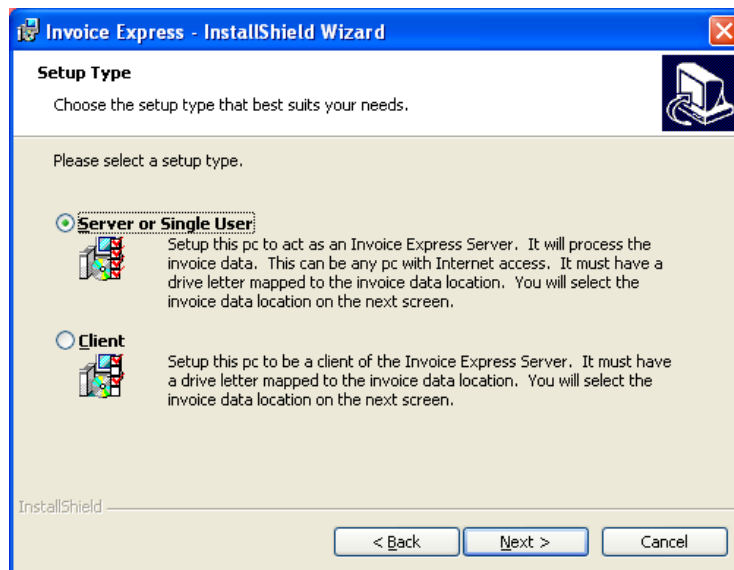
Sample Invoice Express System Settings Screen



◆ **IMPORTANT** - The Wicks Broadcast Solutions\Files\B2B Express folders will need to be shared. Please see your Network Administrator for more information.

4. On a VT workstation, the machine where the person who does the billing for VT works, launch the Invoice Express Installation. The Invoice Express Setup Type screen displays allowing you to select a setup type. Select the **Server** option and click on the Next button to continue.

Sample Invoice Express Setup Type Screen



5. When the installation process is finished, click on the Finish button.
6. Your network administrator will need to map a drive back to the shared folders on the VT server.

Getting Started with Invoice Express

This section will help you get *Invoice Express* up and running in a minimum amount of time. If you have not already installed *Invoice Express*, please do so, referring to [Invoice Express Installation](#) for assistance. Then return to these instructions to configure the *Invoice Express* software.

Overview

As explained in the installation process, you may have one or more PCs that do the actual work of sending electronic invoices, and you might have one or more PCs that merely place electronic invoice files in folder so that another PC can send those files.

PCs that do the actual sending (transmitting) of electronic invoice data are referred to as Invoice Express "**servers**". There could be more than one PC that acts as an Invoice Express server. There will always be at least one PC that is an Invoice Express server.


The instructions in this document apply only to the Invoice Express "**server**" machines. (There is nothing to configure on the other PCs which will merely send their electronic invoice data files to a location for the "server" PCs to process.) For PCs that you chose to install as an Invoice Express "server", follow these steps to configure them. Once you have completed these steps for each "server" PC, these settings will rarely need to be changed, if ever.

Data Clearinghouses

If the only type of electronic invoicing you will do is e-mailing directly to the recipient, the Invoice Express application will handle all of this for you. Most users, however, will also use the services of a **data clearinghouse company** to assist in the distribution of their invoices. This is especially true if you will be electronically invoicing orders placed through the larger advertising agencies.

Invoice Express currently interfaces with our own AgencyMinder.com. You will need to register with this service provider before processing your electronic invoice data.

AgencyMinder.com was created by Marketron, in partnership with *eMediaTrade*, to keep costs low. Below are internet addresses which provide contact or registration information for each service.

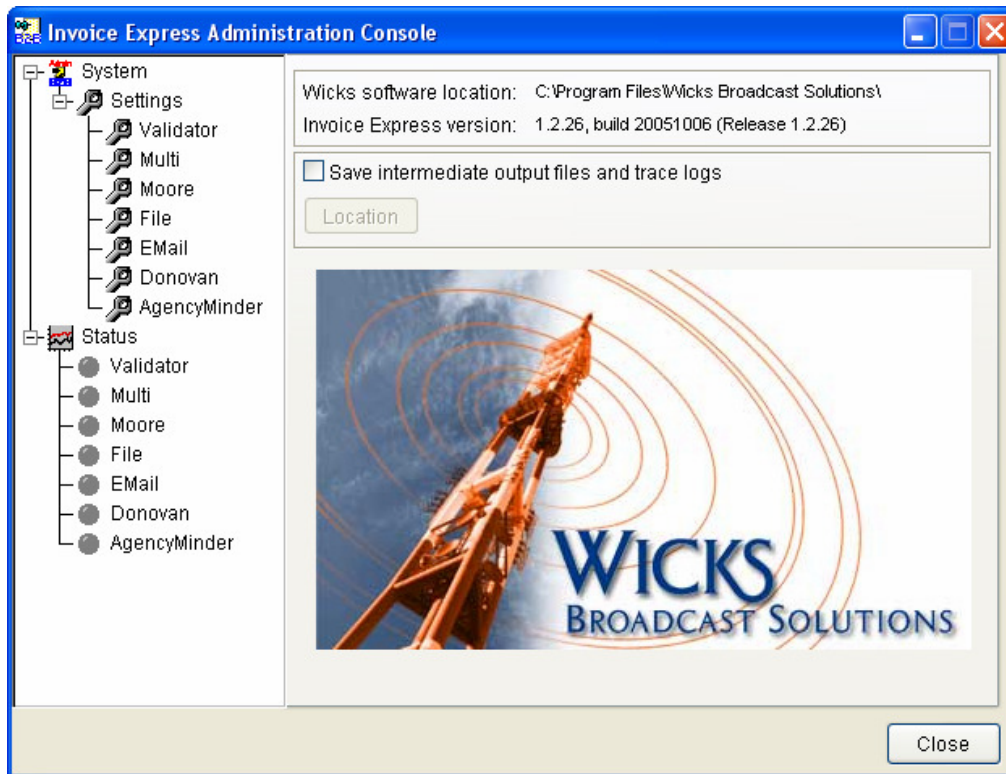
 **FYI** - This information was accurate at time of this publication. It is subject to change without notice.

Service provider name	General website address, followed by Specific website address for contact or registration
AgencyMinder.com by Marketron Broadcast Solutions and eMediaTRADE	http://www.agencyminder.com http://register.emediatrade.net

Configuring the Invoice Express Admin Console

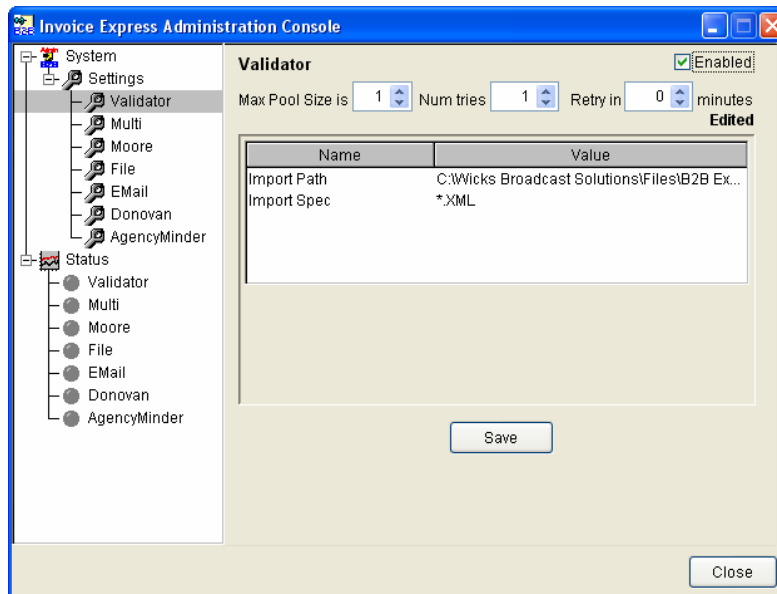
1. On the Start/Programs/Wicks Broadcast Solutions menu, select the Invoice Express Admin Console. The Admin Console is where all the settings are contained so Invoice Express knows what to do with your electronic invoice data.
2. In the navigation pane on the left-hand side of the screen, click the + in front of System, and then the + in front of Settings. This will expand the navigator, and show all the various items that can be configured, as shown here.

Sample Invoice Express Admin Console Screen



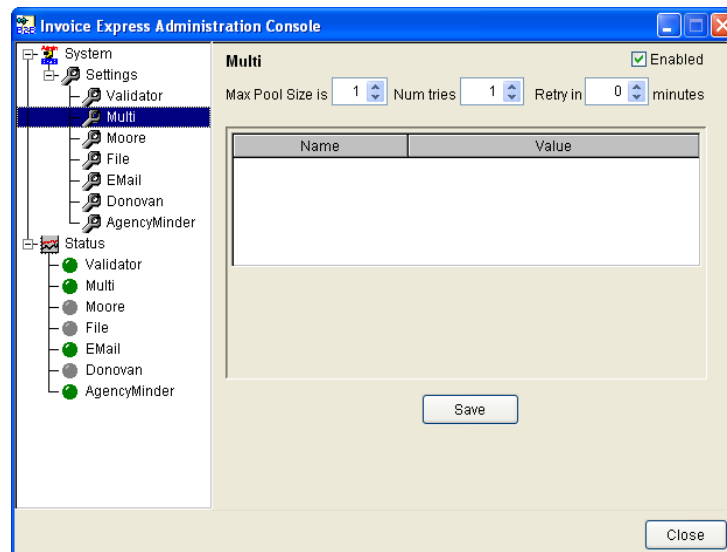
3. Click on Validator to open the Validator settings. The Validator is what checks, or "validates" the data files that come from the traffic and billing system, to ensure it is valid.
4. On the Validator screen, complete the following information:
 - A. Check the **Enabled** box at the top-right, so that it is "on".
 - B. Verify that the **Import Path** is set to the **\\Wicks Broadcast Solutions\Files\B2B Express** folder. The drive letter will vary, depending on what drive letter was selected in the installation process.
 - C. Verify that the **Import Spec** setting says ***.XML**.
 - D. Click the **Save** button to save the new Validator settings.

Sample Validator Screen



- In the navigation pane on the left, click **Multi**. Click the **Enabled** box so that it is "On" then click on the Save button to continue.

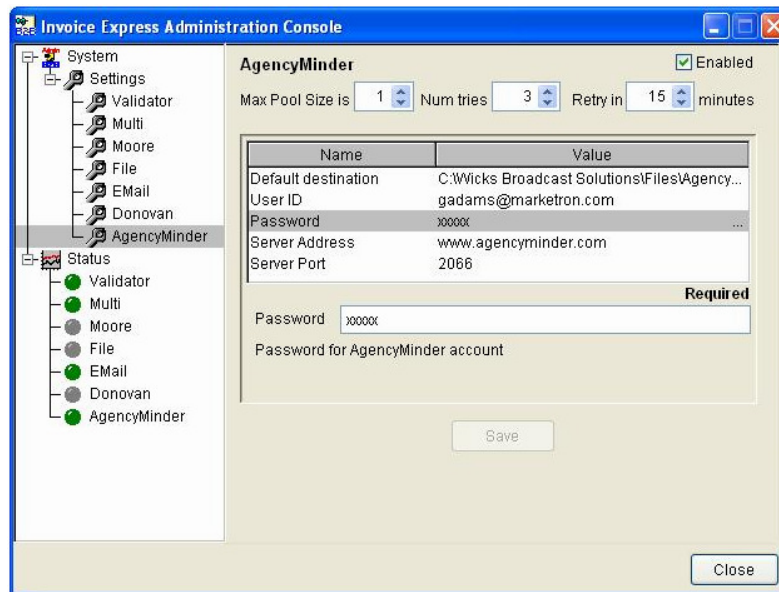
Sample Multi Screen



- For **AgencyMinder.com** users, you will need to supply settings for the **User ID**, **Password**, **Server Address** and **Server Port** before you can enable the setting. A User ID and Password will be assigned to you when you sign up for an account with AgencyMinder. This information will usually be given to you by Marketron. The Server Address will always be: **www.agencyminder.com**. The Server Port will always be: **2066**. Then make sure the **Enabled** box is checked "On". Click the **Save** button to save your changes.

NOTE - Your internet and network security must be configured to allow incoming and outgoing data transmission on port 2066.

Sample AgencyMinder Screen



7. Close the Admin Console. Remember, although you probably will not need to change any of the settings in the Admin Console for a long time, you can do so at any time by simply opening the Admin Console again from **Start/Programs/Wicks Broadcast Solutions/Invoice Express Admin Console**.

Processing Electronic Invoices

The next step in producing and transmitting your first electronic invoices is to configure your traffic and billing system. Invoice Express works with the **Visual Traffic** system from Marketron Broadcast Solutions.

1. Once the traffic and billing system has been properly configured to produce electronic invoices for those advertisers that need them, using Invoice Express is almost totally automatic. The Invoice Express "server" PCs should be connected to the internet.
2. On a PC that is acting as an Invoice Express "server", you will need to start two other Invoice Express programs which take care of processing the electronic invoice files created by Visual Traffic. These are the **"Invoice Express Dispatcher"** and **"Invoice Express Transaction Inbox"**, which can be found in the same location as the Admin Console: **Start\Programs\Wicks Broadcast Solutions**. If the Dispatcher and transaction Inbox are not running, your electronic invoice data will not be processed.
3. The Dispatcher and Transaction Inbox processes can be left running all the time, if you like. But they really only need to be running at the time you generate invoices. Some Invoice Express users place shortcuts to the Dispatcher and Transaction Inbox in their Windows "Startup" group. This way, the processes are usually always running, and will begin transmitting electronic invoices the moment the traffic and billing system generates them. In this case, be sure to check the Dispatcher and Transaction Inbox windows every now and then for error messages. On the other hand, some users like to start these two processes manually, from the Start Menu, only when they are ready for invoices to be transmitted, and then close them afterward. It's a matter of your preference. In either case, if you notice error messages in the Dispatcher or Transaction Inbox, call Marketron Customer Support for help resolving any problems.

How long does it take to transmit electronic invoices? In a perfect world, just a fraction of a second each. In the real world, it depends on the speed of your internet connection, how busy the data clearinghouse servers are at the time you try to transmit, and the number of invoices you're sending.

Generally speaking, however, if you have been careful to find and resolve invoicing errors within the traffic and billing system before generating the real invoices, much as you would do before printing invoices to paper, each electronic invoice will be transmitted almost as quickly as it is generated. Usually, by the time you get done with your invoice generation routine, Invoice Express will have already started transmitting your electronic invoices to their destination.

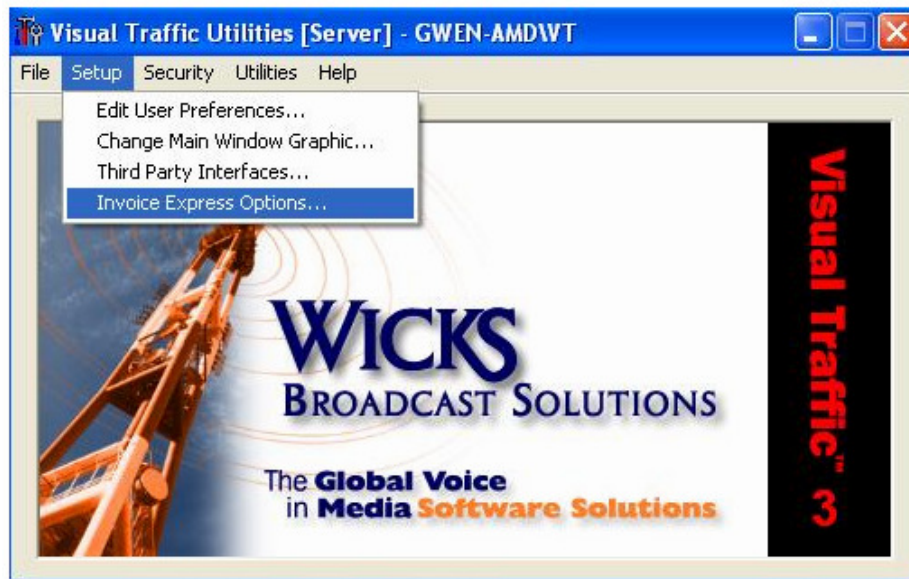
Configuring Visual Traffic for Invoice Express

These steps will guide you through the process of configuring **Visual Traffic** to designate which advertisers, agencies, and orders are to be invoiced electronically.

If your **VT Server** is **not** the same computer as your **Invoice Express server**, your VT System Administrator will need to edit a few settings on the VT Server to allow proper data exchange. If the VT Server and the Invoice Express server is the same computer, you can skip to the [Edit Existing Advertisers](#) section.

1. The VT System Administrator should logon to the VT Server with administrative rights, and then login to **VT Utilities**.
2. From the **Setup** menu, select **Invoice Express Options**.

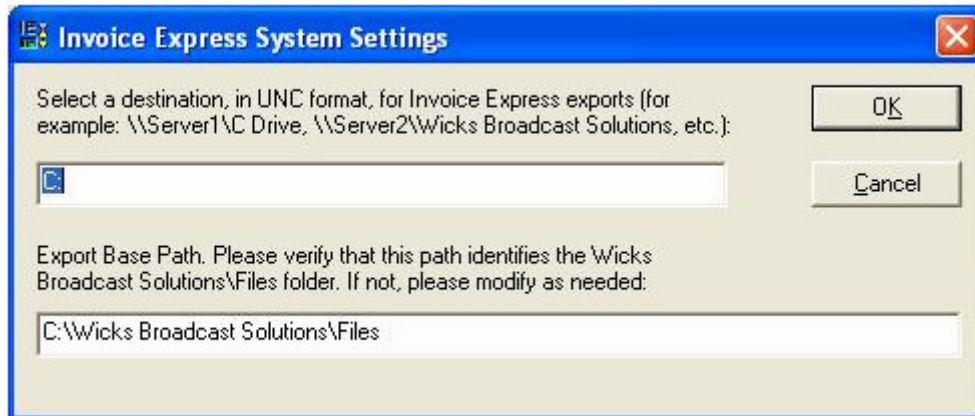
Sample VT Utilities Screen



3. The Invoice Express System Settings dialog appears.
4. On the Invoice Express System Settings dialog, enter the path for the machine that will be the Invoice Express server.

NOTE - The Invoice Express server must be set up to share the location being specified here.

Sample Invoice Express System Settings Screen



5. When Invoice Express is installed with a **new** Visual Traffic system, advertisers and orders are usually configured to use Invoice Express as they are entered into the system. When Invoice Express is added to an **existing** Visual Traffic system, you may need to edit advertisers, agencies, orders and even individual existing invoices to be able to transmit invoices electronically using Invoice Express. The following steps explain what your VT operators will need to know:
 - A. Identify the **advertisers** and **agencies** that will accept electronic delivery of invoices. Generally speaking, the most-likely candidates for electronic invoicing are the national agencies, and their advertisers, while regional and local agencies and advertisers will be less-likely candidates.
 - B. To implement electronic invoicing, you will only have to work with those advertisers and agencies who prefer to receive invoices in this manner.
 - C. Once an Advertiser record has been set up for electronic invoicing, any **future** orders entered for that advertiser will automatically use the electronic invoicing settings of the advertiser.
 - D. You will have to individually configure **existing** orders if you want them to use electronic invoicing.

Edit Existing Advertisers

To edit an advertiser, complete the following instructions:

1. Access the advertiser record in the usual way. From the Advertiser menu, select **Edit Advertisers**, and then select the advertiser you want to work with. Click the **Edit** button. From the main advertiser record, click the **A/R Settings** button, which opens the A/R Settings screen.
2. On the Sample A/R Settings screen, in the **Electronic Invoicing** field, select the **Invoice Express** option.
3. Click the **Details** button, located next to the drop-down list.

Sample A/R Settings Screen

4. This opens the Invoice Express Routing Info dialog.
5. On the Invoice Express Routing Info Dialog, click **New**, then in the **Routing Type** dropdown list, select one of the types of electronic invoicing that will be used for this advertiser:
 - A. **AgencyMinder**. AgencyMinder.com is a electronic data interchange (EDI) clearinghouse that was co-created by Marketron, with the express purpose of keeping costs low. Plus, it's very easy for agencies to get data from AgencyMinder, in the format they want, without you having to worry about all the different formats that different agencies require.

TIP - The **Disabled** checkbox on this screen can be used to turn off the selected delivery type, without having to delete it. This is useful in the event you want to temporarily suspend electronic delivery for this advertiser, but resume it later.

6. Click the **Save** button to save the routing configuration.

Sample Invoice Express Routing Info Dialog

Invoice Express Routing Info for [Advertiser : 13581*]

Type	Output

Buttons: New, Edit, Save, Delete, Cancel

Routing Type: AgencyMinder

Unused:

Disabled

◆ **IMPORTANT** - If you set up advertiser records which are actually agencies, and you choose AgencyMinder routing for these agencies, we encourage you to also enter the **Agency Code** assigned to that agency by AgencyMinder.com in the **External ID** field of the main advertiser screen. The External ID field is used within the AgencyMinder.com system to target the invoices to the correct agency.

Sample Edit Advertiser Screen

Edit Advertiser 123 THRIFT STORE

Advertiser Name: 123 THRIFT STORE

Default Statement Group: WWW-FM / WWW-AM

Legal Entity:

Business Number:

Reference Id: 1745

External Id:

Default Agency: << None >>

Addresses:

Line 1: P.O. BOX 607

Line 2:

Line 3:

Line 4:

City: LA GRANGE

State/Prov: TX

Zip/Postal: 78945

Country:

Phone Numbers:

Number: 979

Contacts:

Name: CARLA CARRANZA

Default Receivables Account: A/R Cash - WWW-FM

Default Income Account: Local Sales

Added on: 02/13/2006

Available Salespersons:

- Account, Trade
- Accounts (W/CS), House
- Accounts, House
- Bradley, Paul

Current Salespersons:

- * Ratchford, Lynnet

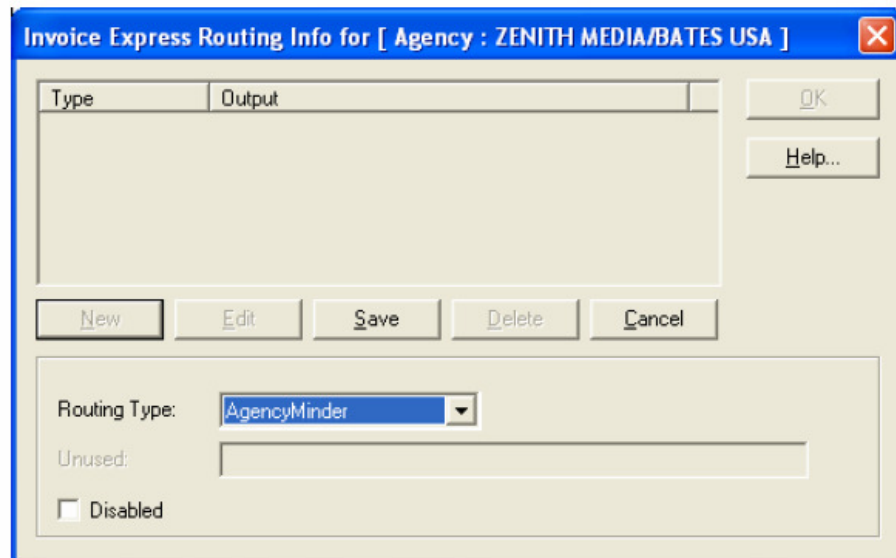
Buttons: Add >>, << Remove, Default Salesperson

Edit Existing Agencies

To Edit an agency, complete the following instructions:

1. Access the agency record in the usual way. From the Agency menu, select **Edit Agency**, then select the agency you want to work with. Click the **Edit** button, to see the Agency Setup dialog.
2. On the Agency Setup dialog, the electronic invoicing settings for agencies are located at the very bottom-right.
3. In the **Electronic Invoicing** field, select the **Invoice Express** option.
4. Click the **Details** button, located next to the drop-down list.
5. The Invoice Express Routing Info dialog opens.
6. On the Invoice Express Routing Info dialog, click **New**, and then in the **Routing Type** drop-down list, select one of the types of electronic invoicing that will be used for this agency: **E-Mail** or **AgencyMinder**.
7. Click the **Save** button to save the routing configuration.

Sample Invoice Express Routing Info Dialog



◆ **IMPORTANT** - For any agencies you set up to use AgencyMinder routing, we encourage you to also enter the **Agency Code** assigned to that agency by AgencyMinder.com in the **External ID** field of the main Advertiser screen. The External ID field is used within the AgencyMinder.com system to target the invoices to the correct agency.

Sample Agency Setup Screen

Agency Setup

Agencies

- WESTERN INTERNATIONAL MED - (138)
- WESTERN WIRELESS CORP. - (28)
- WESTIN DIRECT - (7)
- WHITE STALLION PRODUCTION - (73)
- WHITE STALLION PRODUCTIONS, INC. - (211)
- WILLIAM SULLIVAN ADVERTISING - (183)
- WILSON BINKLEY ADVERTISING - (89)
- XENTEL, INC - (196)
- ZENITH MEDIA/BATES USA - (77)**

New Save Cancel Delete Remove Corporate Link

Agency Name: ZENITH MEDIA/BATES USA

Legal Entity: Business Number: Added on: 07/19/2002

Reference Id: 77 Default Agency Commission: NAT'L AGENCY COMMISSION 15%

External Id:

Addresses: _Default
Line 1: 6300 WILSHIRE BLVD.
Line 2:
Line 3:
Line 4:
City: LOS ANGELES
State/Prov: CA
Zip/Postal: 90048
Country: USA

Phone Numbers: _Default
Number: 213-782-5127

Contacts: _Default
Name: LISA ROSS

Credit Policy: << None >>

Run Credit Policy Check...

Miscellaneous Agency Data

- Default Agency Label One
- Default Agency Label Two
- Default Agency Label Three
- Default Agency Label Four

Disable for use on new orders
 Legal action for nonpayment
 Order approval required
 Purchase order number required

Electronic Invoicing: Invoice Express Details...

Edit Existing Orders

To enable electronic invoicing on existing orders, complete the following instructions:

1. From the Orders menu, access an order in the usual way.
2. On the main Order screen, click the **Invoicing** button to open the Invoice Information dialog. The electronic invoicing settings can be found near the bottom of this dialog.
3. In the **Elec. Invoice Type** field, select the **Invoice Express** option.
4. The **Agency Product Code** is usually an alphanumeric code supplied by the **originator** of the order (the agency or rep firm). If their order supplied this code, enter it here to facilitate the electronic invoicing process.
5. Likewise, the **Agency Client Code** is another code (usually 2 or 3 alphanumeric characters, the first two of which are alphabetic) supplied by the **originator** of the order. If their order supplied this code, enter it here. These codes help identify the advertiser and their product, even if you name them slightly differently in your VT system.
6. Click **OK** to accept the changes to the invoice information.

Sample Invoice Information Screen

Length	Count	Rate	Total
00:00:30	366	65.00	23790.00
00:00:30	732	40.00	29280.00
00:00:30	732	50.00	36600.00
00:00:30	366	50.00	18300.00
00:00:30	366	25.00	9150.00

7. When done with an order, close it, and move on to the next order to be changed.

FYI - Remember, the advertiser record does not allow electronic invoicing, no electronic invoices will be generated for an order, no matter how the order is set.

Edit ISCI Codes in Copy Maintenance

Electronic invoicing uses **ISCI codes** (Industry Standard Commercial Identification) for copy, in order to consistently identify the creative copy that airs, no matter what other title or description you may give it in your VT system.

To enter an ISCI code, complete the following instructions:

1. In the Copy Maintenance section of VT open the Create/Edit Advertiser Copy dialog.
2. On the Copy Maintenance screen, enter the appropriate ISCI code in the ISCI code field.
3. Click on the OK button to accept the change.

NOTE - In the case of "piggy-back" copy situations, there should be two ISCI codes separated by a space.

Sample Copy Maintenance Screen

The screenshot shows the 'Copy Maintenance' dialog box. The 'ISCI Code' field is highlighted with a black oval. The 'Cart Range Type' section has radio buttons for Commercial, PSA, Promo, and Live. The 'Product Code' is set to 'FINANCIAL/BANKS' and the 'Log Description' is 'A & A TITLE & CHECK LOAN, INC -'. The 'Restrictions' section shows a permit for '02/08/2006-02/08/2006 - Wed - 06:00:00-08:00:00'. The 'Cart Assignment Information' section shows 'Available Stations' (NTR-TV) and 'Assigned Stations' (KKFM-FM - q85.M, KKKK-FM - q85.M, WVAW-FM - q85.M, WwFW-AM - q85.M, Wwww-FM - q85.M, Wwww_AM - q85.M). The 'Cart #' is 'q85'.

Edit Existing Invoices

If logs have been accepted for the current month, it means invoices have already been created. Therefore, if any of these **existing** invoices need to be delivered electronically, you will need to edit these invoices individually by completing the following instructions:

1. Go to the Billing menu, and select **Edit/Create Invoices**.
2. Select an invoice by selecting an advertiser and then highlighting a specific invoice for that advertiser.
3. At the bottom of the Invoice Selection dialog, click the **Edit** button.
4. The Invoice Maintenance dialog appears. Click the **Edit Invoice** button in the bottom left corner. This opens the Edit Invoice Definition dialog. At the lower-right of this dialog are the settings for electronic invoicing. Choose **Invoice Express** for this setting. This invoice will now use the same Invoice Express routing instructions that you configured for the advertiser.

Sample Edit/Create Invoices

Advertiser...

Find...

Show Disabled Advertisers (* Indicates an Advertiser Group ... (D) Indicates a disabled Advertiser)

Statement Group: KITN-FM Accounts Receivable Account: << All A/R Accounts >>

Advertiser	Invoice #	Close Date	Net Amount	Invoice Description	Printed	Status	Invoice Type
*MARCIA'S SAMPLE AC	992-00005-0000	03/27/2005	10.20		Yes	Open	Per Spot

Current Invoices

Invoices Shells History Find...

New... Edit... Delete Audit Info... Change Close Date... Update Advertiser Group Definition... Send Electronically...

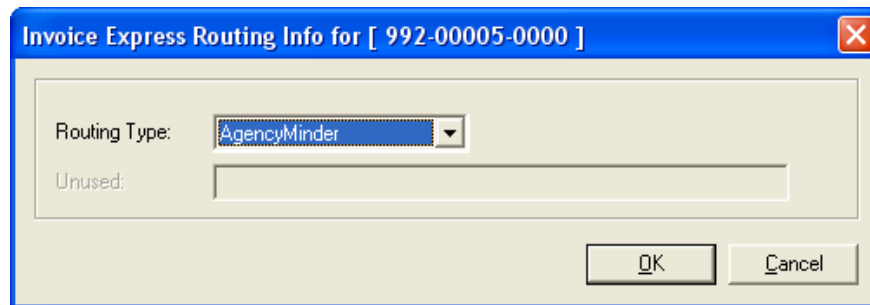
Help Close


Send Existing Invoices Electronically

To electronically transmit an existing invoice immediately, one invoice at a time, complete the following instructions:

1. From the **Create/Edit Invoices** screen, in the Billing menu, locate and select the invoice in the usual manner.
2. If it's not already set up for electronic invoicing, follow the instructions in the [Edit Existing Invoices](#) section.
3. Return to the Edit/Create Invoices dialog, making sure the desired invoice is highlighted, and then click the **Send Electronically** button at the lower-right of the screen. This opens the Invoice Express Routing Info dialog.
4. Use this dialog to set the routing type for this **one time** transmission of the invoice. This **does not** affect any other routing information that's been entered for the advertiser or the order.

Sample Invoice Express Routing Info Dialog



 **FYI** - Historical invoices can be sent electronically using this method, **provided** the invoice was previously configured to use Invoice Express. You cannot edit the settings of a historical invoice. Any historical invoice not already configured for electronic delivery can not be sent electronically.

Exporting VT Invoices to Invoice Express

We recommend that you print and review your invoices that have a watermark of "Invoice Express" and if necessary make any changes before you begin the export process. If you are satisfied with the invoices you can export the invoices to Invoice Express.

To export the invoices, complete the following instructions:

1. From the main VT interface go to the "Database" menu and select the "Exports" option.
2. In the Exports section, select the "Electronic Invoices" option.


Sample Visual Traffic Screen



3. On the Electronic Invoice Export Dialog, complete the following information:
 - A. In the Processing Date field enter the invoice processing date. This is the date that you enter when printing your invoices. For example you entered a Media month end date for November then you should enter Media month end date for November in the Processing Date field.

NOTE – If you have Electronic invoices that are Calendar billing, please export your calendar invoices one at a time from Edit/Create Invoices. This prevents you from sending incomplete media invoices to agencies.

- B. In the Statement Group field, use the drop down menu to select the Statement Group that you wish to export invoices for or if you are ready to export all invoices on all Statement Groups then select "All Statement Groups".
 - C. In the Electronic Invoice Type field, use the drop down menu to select the Invoice Express option.


 **NOTE** - Only select the box to "Include invoices that have all ready been marked as exported" if you are re-exporting the invoices.

D. Click on the OK button to export the invoices to Invoice Express.

Sample Electronic Invoice Export Screen



4. Once you have exported the invoices, open the Invoice Express Transactions Inbox by clicking on Start, All Programs, Wicks Broadcast Solutions, and Invoice Express Transactions Inbox.
5. After the Transaction Inbox is open, open the Invoice Express Dispatcher by clicking on Start, All Programs, Wicks Broadcast Solutions, and Invoice Express Dispatcher.

 **NOTE** - You should see the green buttons change to a lighter shade of green during invoice processing.

6. At any time during the month after you have exported your invoices you can check to make sure the invoices exported from Invoice Express. On the Invoice Express Administration Console, click on the routing type button. For example, if the invoices were exported to Agency Minder, click the Agency Minder button and on the right of the screen you will see the invoices status.

Sample Invoice Express Administration Console Screen

The screenshot displays the 'Invoice Express Administration Console' window. On the left is a tree view with the following items: System, Status, Validator, Multi, Moore, File, Email, Donovan, and AgencyMinder. The 'AgencyMinder' item is selected. The main area contains a table with the following data:


Document	Received	Processed
Invoice 2916-4-6 Processed Successfully	12/28/2006 08:48:06 AM	12/28/2006 08:51:51 AM
Invoice 2916-4-6 Processed Successfully	12/28/2006 08:48:04 AM	12/28/2006 08:52:02 AM
Invoice 494-2-69 Processed Successfully	12/28/2006 08:48:01 AM	12/28/2006 08:52:01 AM

At the bottom of the console, there are several controls:

- Four checkboxes with colored circular icons:
 - Show Pending (green)
 - Show Processing (yellow)
 - Show Succeeded (green)
 - Show Errors (red)
- Show messages
- Buttons: Retry, Cancel
- Text: Display entries received: Between and
- Close button

7. If all invoices have been exported successfully, you have completed the Invoice Express process.

Using your AgencyMinder.com Account

 **FYI** - For information on Agency Minder please refer to the Agency Minder documentation or visit www.agencyminder.com.

Media Exchange Desk

When you login to your AgencyMinder.com account, you are taken to the **Media Exchange Desk**. This is the web-based platform on which radio retailers (stations) and advertising agencies exchange electronic business documents associated with the buying and selling of spot advertising time.

For the most part, the exchange of documents is done automatically, once a "**Targeting**" process has been performed. Targeting is simply a way to ensure that both you and the data clearinghouse are referring to the exact same agency that you intend. To make sure you really are talking about the same entity, the Media Exchange Desk uses an agency numbering system to make the targeting process simple. Furthermore, Media Exchange Desk also lets you "Subscribe" to its entire list of participating agencies, which is constantly-updated. This means your AgencyMinder.com account always has the targeting process done.

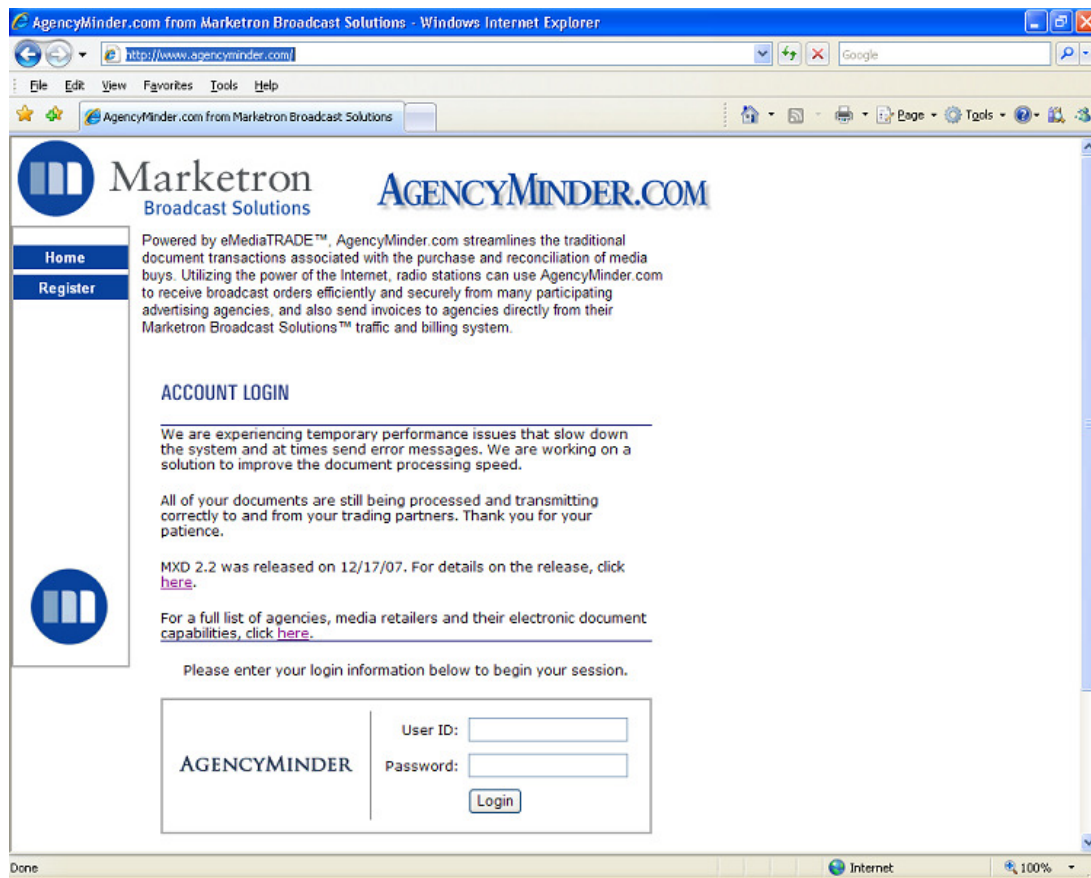
Once these "Target Rules" are established, you only need to use the Media Exchange Desk interface to check that all your invoice documents were delivered without errors, or whenever you receive a notice (usually via e-mail) that some of your uploaded documents contained errors or could not be delivered due to missing or invalid targeting information.

Logging In

To log into your AgencyMinder account, complete the following instructions:

1. Access the AgencyMinder website at <http://www.agencyminder.com>.
2. Enter your **User ID** using lower-case letters. Usually, the ID is in the format of an e-mail address.
3. Enter the **Password** that you selected, or that was initially provided to you.
4. You will be taken to the **Main Screen** of the Media Exchange Desk, where a list of folders is presented to you. Before looking in the folders, the first thing you should do is establish the Targeting Rules. For more information, see [Establishing Targeting Rules](#).

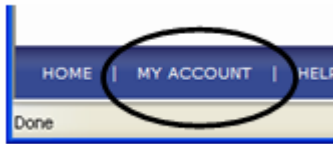
Sample AgencyMinder.com Screen



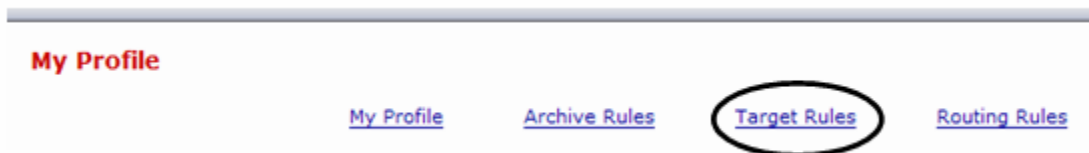
Establishing Target Rules

To establish Target Rules, complete the following instructions:

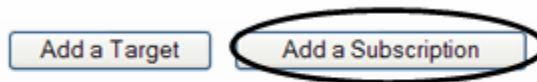
1. Click on the **My Account** link at the bottom of the Main Screen.



2. Then click the **Target Rules** link.



3. On the My Target Rules screen, click the **Add a Subscription** button.



4. Check the box for to turn on the **Agency List** option, and click the **Submit** button to continue.

Name	Type	AutoSend
<input type="checkbox"/> Radio Station list	System	yes
<input type="checkbox"/> Tv Station list	System	yes
<input checked="" type="checkbox"/> Agency list	System	yes

5. You are then returned to the My Target Rules screen, where you will see any entry similar to the one in the sample screen.

Sample My Target Rules Screen

Rule Id	Priority	Name	Doc Type	Details	Target Partners	Delete
17505	UP	Agency list	affidavit			Del

Managing Your Outbox

Now that you have established your Target Rules, the **Outbox** will be your main focus from this point forward. Once your document data is received by AgencyMinder, it will appear in the **Outbox** of your AgencyMinder account.




Sample AgencyMinder Outbox Screen

The screenshot shows the AgencyMinder Outbox interface. At the top, there's a navigation bar with icons for UPLOAD, DOWNLOAD, TARGET, SEND, PRINT, EDIT, VALUEMAP, VALIDATE, and BROADCAST. Below this is a search bar and a dropdown menu for 'Station'. The main content area is titled 'Current Folder: outbox - affidavit' and 'Current User: Wicks Demo'. It displays a table with columns: Doc ID, Status, Date, Station, Station Name, Agency, Advertiser, Inv#, Inv Date, Client, Prod, Est, Gross, Qty, and Target. Three documents are listed, each with a status icon: a red exclamation mark, a yellow question mark, and a green checkmark. An arrow points to the red exclamation mark icon.

Doc ID	Status	Date	Station	Station Name	Agency	Advertiser	Inv#	Inv Date	Client	Prod	Est	Gross	Qty	Target
7633294	Yellow	Feb 28 2008 1:46PM	KDEB	KO95-FM Radio	ENT	QMD	SAFEWAY	46756	01/31/07		12-822	23628.00	0	
7633249	Green	Feb 28 2008 1:41PM	KDEB	KO95-FM Radio	ENT10758	Adwerks	AAA	46669	01/30/07	TRPS	Q1	36585.00	139	Adwerks - Sioux Falls SD - Primary
7632451	Red	Feb 28 2008 1:33PM	KDEB	KO95-FM Radio	ENT10246	Fry Hammond Barr	MARRIOTT	46754	01/31/07		123	30080.00	0	Fry Hammond Barr - Orlando FL - Primary

Each document is immediately validated to ensure that all the required data elements exist and are formatted correctly. The Outbox will list all the documents, and show the **Status** for each.

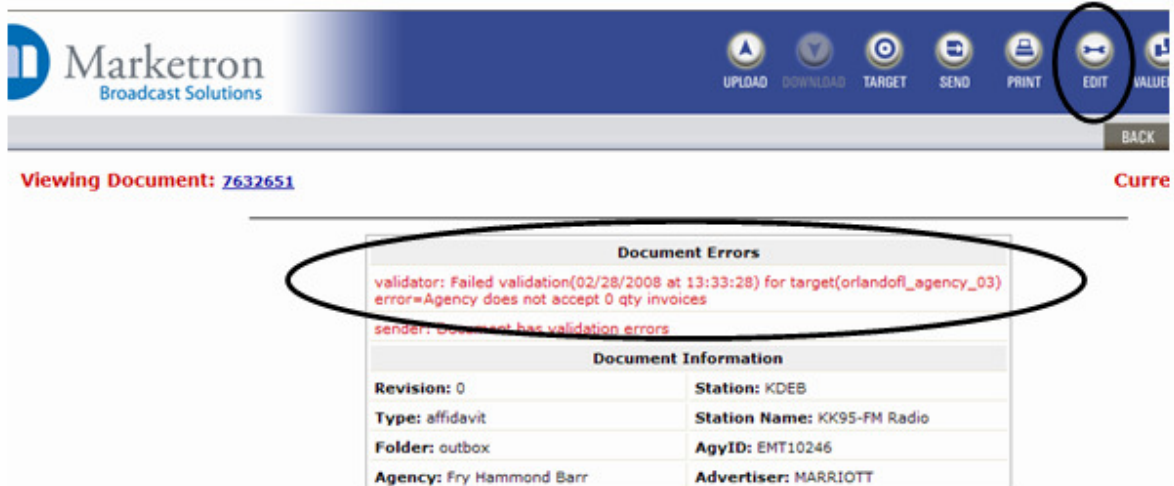
The Status indicators are color-coded in a simple manner:

-  **Red** – indicates that according to the Media Exchange Desk's initial evaluation, this document either does not contain all required elements (data fields) for targeting, or has invalid data in some of those elements.
-  **Yellow** – indicates that according to the Media Exchange Desk's initial evaluation, this document contains all required elements, and has valid data, but is not targeted to a recipient.
-  **Green** – indicates that according to the Media Exchange Desk's initial evaluation, this document contains all basic required elements, has valid data, has been targeted, and is ready to be sent.

Your goal is to get all documents to show a green status. Documents with a green status will be automatically transmitted by the Media Exchange Desk to the intended recipient.

Documents may be managed in any order desired. In order to determine the cause of an error, a document with a **red** status single click on the document ID number. You will see a window with more information about that particular document.

Sample Document Screen



Viewing Document: [7632651](#) Curre

Document Errors	
validator: Failed validation(02/28/2008 at 13:33:28) for target(orlandofl_agency_03) error=Agency does not accept 0 qty invoices	
sender: document has validation errors	
Document Information	
Revision: 0	Station: KDEB
Type: affidavit	Station Name: KK95-FM Radio
Folder: outbox	AgyID: EMT10246
Agency: Fry Hammond Barr	Advertiser: MARRIOTT

Locate the **Document Errors** section to identify the problem.

The most common reason for a red document status is missing or invalid data elements. Certain agencies require specific pieces of contract data (agency client code, agency product code, estimate number) in order to match the invoice to their original contract, so the two can be associated and reconciled. In order to correct these errors, you will need to correct the data elements in question.

Click the **Edit** button in the blue menu bar, correct or add the appropriate data value and then select **Save Changes**.

The single-document information window will refresh itself. Re-check the Document Errors section to ensure no additional errors have been created. Once all errors are resolved, use the pull-down menu in the upper-right to re-select your **Outbox** and then click **Go** to return to your Outbox. You will once again see all your documents waiting for transmission. Work your way through all the documents, correcting those with errors.

Sending Documents

Typically, you will simply leave documents sitting in your Outbox with a green status. The Media Exchange Desk will transmit these for you automatically. This usually happens in the evening or overnight. To make the Media Exchange Desk transmit documents immediately, select one or more that have a green status, and then click the **Send** button in the blue menu bar at the top of the screen.

Remember, the status of any document must be green before it can be transmitted.

You will be stepped through some confirmation screens. Be aware that the Outbox may still show the documents as being ready for transmission, even after you have told the system to send them. This is to ensure the documents are completely processed before they are removed from the Outbox.

You can select the **Sent** box using the pull-down menu in the upper right and clicking **Go** to see sent documents.

Logging Out

When you are finished working in the Media Exchange Desk, it is a good idea to click **Logout** at the **bottom** of the screen. This reduces security risks, and ensures the system properly releases your web session.

