

What's New in Total Advertising

Version 4.0 improvements

NEW FEATURES WITHIN THE PAST 12 MONTHS:

GENERAL / ACCOUNTING:

- (Feb '13) Email toggle button in sales and credit call back entry screens.
- (Dec '12) **Generic holidays** can be set up to apply to all publications and/or profit centers.
- (Nov '12) Updated transaction **history purge** (separate Month End Menu selection)
- (Nov '12) Ability to change profit center using the Account Zoom form by searching for accounts in "all profit centers" and selecting one in a different profit center.
- (Oct '12) **Reorganized and simplified main menu** includes all programs on the previous menu, but they are much easier to find and select for new users in particular.
- (Oct '12) New major rate type in addition to Inches / Lines, for Web-only ads where ad dimensions are in pixels and the print size is zero.
- (Aug '12) Ability to set payment codes to allow credit cards or not, allow refunds (negative amount) or not, and allow check numbers as either digits only or alphanumeric.
- (Jun '12) New user preference item "User Options" allows users to set their own preferences for ad entry startup, callback reminder times, email and fax addresses, etc.
- (May '12) **Record status indicators** (update, find, record number/count, stored, not stored, etc.) display on the major data entry screens in addition to the main menu.

Ad ENTRY AND DAILY PROCESSING:

- (Dec '12) When a record is locked on update, ad and payment entry will display a screen showing current database record locks, and the users holding those locks.
- (Oct '12) **Reorganized main ad entry screen** groups key areas such as basic account and ad information for an overall cleaner appearance and more intuitive behavior.
 - Upsell option to include a default "attention getter" graphic.
- (Oct '12) **Significantly enhanced ad search screen:**
 - Divided into two tabs, one for basic search options and results, the other for additional and advanced search options. The second tab has many new features, while automatically reflecting search options selected in the first tab. While in the second tab, it is not necessary to "Clear" before changing search parameters for a new search.
 - Screen capacity increased from 7 to 20 ads at a time. Display of information is controlled by toggles at the top of the columns, and by a "Show Details" button to display all available information about an ad at once on a compact subscreen.
 - Multiple default answer sets are supported, similar to reports. Search criteria likely to select large groups of accounts or ads will be included in default answer sets. For example, Class Code would be included in a saved answer set but not Billing Description.
 - Ability to search for ads on user defined rate classes.
 - Ability to search for accounts on alternate address as well as main address.
 - All string fields can be wildcarded similar to names (e.g. Class Code, Rate Code).
 - Default sort order is Ad Stop Date, the same as the main screen.
- (Oct '12) Defaults for Rate, SIC, and NIC codes are applied on change of account or class code, but only if the value for these codes matched the previous default.
- (Oct '12) Ad description, PO number, SIC and NIC codes, Salesperson, and Coop information can be changed on expired ads if needed. (Changes will NOT be carried to posted transactions.)
- (Jul '12) Ability to restrict modular size codes to certain rate codes and vice versa.

- (May '12) Double click on ad number for "ad history" showing payments and billing transactions that reference the ad.
- (May '12) User option to search, clear to add, or clear to find on ad entry startup.
- (Jan '12) Zones can now be designated as Internet or Special Section, in addition to publications.

REPORTS:

There have been many enhancements to individual reports. Feel free to explore these, and/or contact Vision Data for more information.

OTHER RECENTLY ADDED FEATURES (LAST 3 YEARS):

GENERAL / ACCOUNTING:

- (Dec '11) Automatic **email of call back reminders** for sales and credit followup. A reminder is sent if an email date is specified in the call back record. User defaults can be set for sales and credit callback days, reminder days, and reminder time of day.
- (Jul '11) Updated Environment Color Preferences screen with a more user friendly organization. New choices for highlighting fields and buttons, and for locked calendar dates.
- (Jun '11) Additional credit card processor interfaces: Authorize.net, PayTrace.

PayTrace includes a "no card numbers" option where all credit card numbers are entered via a browser directly into a database maintained by PayTrace, which returns only the first and last digits to Total Ad. Those continue to be stored in encrypted form.
- (Jan '11) **User defined rate classes**, in addition to the standard Retail, Class Display, Class Liner, Legal, Preprint, Web, Other. Reports that select on this invoke an intuitive Zoom screen to enable selection of any number of values.
- (Jan '11) System can be set up to apply Rate Size Increment to either Ad Height or Total Size
- (Dec '10) **Bad Debt Write Off** - Ability to write off Bad Debt accounts either individually or as a batch, to another profit center designated as its Bad Debt profit center.
- (Oct '10) Ability to generate a spreadsheet of program names and descriptions from the program list.
- (Mar '10) Ability to **fax or email payment receipts**.
- (Mar '10) Publications and zones can belong to more than one group at a time.
- (Feb '10) Ability to bring up the ad referenced by a transaction by double clicking on it.
- (Feb '10) **Sales campaign module** (optional) with tools to set up and manage campaigns to sell advertising.

AD ENTRY AND DAILY PROCESSING:

- (Dec '11) Classification code can be wildcarded for lookup in the ad search screen.
- (Nov '11) Contract button in ad entry and search brings up full maintenance screen.
- (Oct '11) ICSS interface to our new Java Circulation system to display name and address information and subscription status.
- (Sep '11) More flexibility in rate-class restrictions: either type of code can be restricted without restricting the matched code in the other table.
- (Aug '11) Affidavit section codes and descriptions.

What's New in Total Advertising
Version 4.0 improvements, continued (page 3 of 8)

- (Jul '11) **Ability to override the price from the main screen**, without going into Flat Charges. This functions the same internally and requires the same privileges, but the mechanics are now much simpler for the user.
- (Jul '11) **Locked ad run dates will show in a different color on the calendar** than future dates.
- (Jul '11) Ad entry allows search on Box Reply Number.
- (Jul '11) Ability to enter Batch Code for ads, and to make the entered value a default for new ads.
- (Feb '11) Users can be set up to **start the Publisher and/or use the Search Screen, as separate options**. When the search screen is not used, ad entry will start up in Add mode rather than Find mode.
- (Jan '11) Profit center option to automatically print an insertion order for internal use whenever an ad is committed, or a committed ad is changed.
- (Dec '10) Ad Journal (Authorization) can include custom or no text in addition to, or instead of, standard text.
- (Nov '10) Ability to prevent ads from being entered if they put the account over its credit limit.
- (Nov '10) Display ads will be rejected if they are less than the minimum size specified in the rate. (Classified liners will continue to be accepted and charged the price for the minimum.)
- (Nov '10) Ability to limit rate codes that can be used with certain classes, and vice versa.
- (Nov '10) Users who can override flat charge amounts can also override lineage adjustments.
- (Sep '10) Ability to prevent new accounts from entering ads until credit checked (as if bad debt).
- (Aug '10) Separate automatic flat charge types for photos, logos, attention getters, and dingbats, with ability to **adjust billable lineage to offset the flat charge**.
- (Jul '10) **Pub Group** can be used to dump multiple publications and zones in a single run for both Display and Classified pagination.
- (Jul '10) Contract Code for Flat Additional Charges will by default match the ad or transaction, if possible for the Flat Charge Code.
- (Apr '10) Ability to calculate and track preprint inches for contracts and space summary
- (Apr '10) Optional email address for error reporting when the Classified dump is processed by a batch queue.
- (Mar '10) Preference ads will no longer be purged with other ads on hold that are past their stop date by the set number of purge days.
- (Feb '10) **Enhancements to the Classified dump process:**
- Automatic conversion of graphics to web friendly format.
 - Can be scheduled to run automatically as often as desired. Runs can be limited by day of the week and time of day (e.g. business hours Monday through Friday.)
 - A cutoff time can be specified after which the next day's ads will be selected.
 - Date advance controllable by number of days, similar to reports (see below.)
- (Feb '10) Weight in ounces can be specified for preprints and incorporated into the pricing structure.
- (Dec '09) **Advisory lock stamp on ads**, so users can avoid stepping on each other with the same ad in ad entry

REPORTS:

- (Dec '11) Additional queue monitoring and management features.
- (Mar '11) Queue management enhancements: ability to monitor and manage all servers from one screen, plus immediate cancellation when deleting a job in process.
- (Feb '11) New report: History Sales Date Range Comparison
- (Jan '11) Ability to select on **system or user defined rate classes** in many reports, including the Ad and Transaction Edit Listings.

- (Dec '10) Ability to set **system or profit center defaults** for reports.
- (Dec '10) New Abandoned Web Ads report for sites with web order entry.
- (Dec '10) Based on user feedback, date offsets to user defaults are no longer used.
- (Oct '10) Ability to limit queued reports to **selected days of the week**.
- (Mar '10) User specified print file names placed in the default print file directory automatically.
- (Jan '10) Date and accounting period parameters can be advanced automatically on re-queued reports – either daily, or after a specified number of days such as 7, or monthly.
- (Jan '10) Error handling changes: (1) "No records found" is no longer considered an error; a document stating this will be output and processed the same as a normal print file. (2) If any print file cannot be printed, emailed, or otherwise processed as requested, the queue record will be retained with a status of "Completed" and the transmission error shown under "Error Message".

PREVIOUSLY ADDED FEATURES (MORE THAN 3 YEARS AGO):

GENERAL / ACCOUNTING:

- (Nov '09) Ability to set up a competitor newspaper as its own profit center, and to track advertisers' activity there
- (Oct '09) **Change audit module** originally implemented in May '08 for account and ad records and in Mar '09 for rates, now covers most data tables.
- (Jul '09) Space summary able to report to inter-company GL accounts for consolidation.
- (Jun '09) Space summary reporting by day of week, and by Local vs National (for history analysis only.)
- (Mar '09) "Optional Settings" button in Profit Center Maintenance allows the behavior of certain features, otherwise customized system wide by Vision Data, to be set by the user for each profit center.
- (Mar '09) **Ability to grant users access to more than one but less than all profit centers**. Users can access only those profit centers for which they have been specifically set up, unless they are in an access group that automatically accesses all profit centers. Includes:
 - Updated user setup form, showing 5 records per screen with most ad entry functions displayed on a sub-screen
 - Ability to copy user access records from one profit center to another
 - Default copy of user records for all profit centers authorized for the original user
 - One-click profit center change from ad entry for multi-profit-center users
 - Users can be in different access groups in different profit centers. If they change profit center to one in which they lack privilege for a running program, that program will automatically terminate.
- (Mar '09) Rate code changes now tracked.
- (Dec '08) Biweekly, monthly, bimonthly, quarterly, semiannual, and annual publication schedules are supported in ad entry and throughout the system.
- (Oct '08) **Updated history purge program** addresses certain database and other issues. Payment and transaction entry can now take place during a purge, except for the account currently in process.
- (Oct '08) Ability to force coop records to a fixed lineage or dollar amount instead of a percentage.
 - Credit card information includes the **card holder name and address** for verification.

- Changes to account and ad records tracked in detail by an **audit module**. Additional tables will be added to this module as time goes on, eventually extending to all user maintained data.
- Optional timeout function. A warning is displayed after the configured number of minutes, and the application exits 5 minutes later if there is no activity. The timeout can be set differently for full and read-only users.
- **Allocation of flat additional charges to publications** is based on the flat code table, where possible.
- The ad queue creates tentative future billing records for all ads, allowing **faster and more accurate processing** for ad edit listings and similar reports.
- The **rate table has much more flexibility**. For instance, a rate can now depend on both the ad size and the contract commitment, where formerly, it could only depend on one or the other. A rate can also now have both actual and prompt payment discounts, as well as a contract discount.
- Biweekly and monthly publication schedules supported in ad entry and throughout the system.
- **Credit card numbers stored encrypted** throughout the system.
- All **date fields can be filled by double clicking to bring up a calendar**, then double clicking on the desired date.
- A “login override” feature allows a manager to come to a user’s desk, log in as themselves, and make changes (such as overriding ad prices, etc) that the user cannot do with their own login. Once the changes have been made, the manager can log out, and access rules will go back to the original user’s permissions.
- New web fields have been added to the classification table so that a site can select a default rate code, mod size code, etc for ads taken over the web, that are different from the default codes for ads keyed from inside Total Ad. This applies to sites that have the VisionWeb Classified Order Entry module.
- Payments can now be keyed in towards a specific source number, similar to payments towards a specific ad number. This is a great feature for sites who have preprinted ticket numbers, and need to key in a payment for an ad before it is stored in the system.
- A “Revenue flag” field has been added to the rate maintenance screen, for keying debit adjustments as transactions using the rate code, and excluding those transactions from revenue reports.
- A rate code option can be set to adjust “first insertion” ads, if killed early or otherwise modified, to the amount due for the days actually run. Formerly, such ads would always charge the price for the original full run.
- Service charge and billing fee can now each be specified for commercial accounts, transient accounts, both or neither.
- Batch code has been added to transaction entry, similar to the batch code in payment entry. For example, a batch of commercial print charges or adjustments can be put in using a certain batch code. Later, a transaction edit listing can be printed for those charges by specifying that batch code.

AD ENTRY AND DAILY PROCESSING:

- (Sep '09) Ability to flag individual liner ads for color
- (Sep '09) Improved performance when scheduling publications within an ad, by skipping the price recalculation until all are finished.
- (Aug '09) Ability to default line ad scheduling to calendar mode.
- (Jul '09) **Filler ads** can be entered, and will be dumped, in a manner similar to class headers.
- (Jun '09) **"New Today" zone**, for multiple dumps of an ad on its first day.
- (Jun '09) **Ads can be locked based only on being a Publisher or Display ad**, without regard to rate class.
- (Jun '09) **Deadlines can be set by ad lock category and day of week**. Ads taken after the deadline will default – but not forced – to start on the following publishing date.
- (Apr '09) Ability to specify mod size height to 4 or more decimal places for Display layout

What's New in Total Advertising
Version 4.0 improvements, continued (page 6 of 8)

- (Apr '09) **One click change of profit center** for users with access to more than one.
- (Apr '09) Support for limiting rate code availability to certain days of the week.
- (Mar '09) **Provision for online-only text**, and for additional online content such as images, videos, maps, etc. Ability to display printed text independently of the Publisher, and to enter it manually for Display ads. Online content can be viewed in a browser to assist in review of ads submitted online.
- (Mar '09) Provision to have different reply box text by profit center.
- (Feb '09) Reply box number carried over on a copy or renewal
- (Feb '09) Revised and expanded hot key set
- (Dec '08) Ability to link automatic flat charge codes to rate codes
- (Nov '08) Shows ad height in both inches and lines, allowing entry of either for a Display ad.
- (Sept '08) **Ability to change the rate code on a running ad**, as long as publications don't have to be changed.
- Fielded data answers can be associated with flat charge upsells, so that they can only be selected if the corresponding upsell is.
 - **Version 3.2 ad entry screen.** Similar to Version 3.1, slightly shortened to fit on 1280x800 resolution laptop monitors. All tabs consolidated into one screen group; pricing information is always visible. Flat charges are on a separate screen accessed via a button.
 - Ability to search for ads based on any text, not just first words. Double click on description in the ad search screen to access this feature.
 - Significantly **enhanced line ad dump options**, including the ability to combine any desired publications and zones in a single dump, or as separate dumps in a single run. This program also does all **internet dumps** including for retail display ads.
 - Ability to define valid ad color choices in Tables -> General Codes.
 - Version 3.1 ad entry screen. **Redesigned with the data entry portion occupying only the left half of the desktop, leaving the right half for Publisher ad text**, or for the layout screen for display ads.
 - Payment entry has been moved to a separate screen form activated by a button, instead of being on a tab. This is similar to how Version 2 worked.
 - **Prompts and answer selections** can be set up by classification, for use in automatically composing ad text, and / or **for associating with tags for Internet posting**. Prompts can be set to require an answer or not, and to limit the answer to one of the selections or allow any response.
 - All ads are created with an initial hold, until committed for publication by the entry operator, using a button on the ad entry screen. If the operator attempts to exit from the ad without committing it, the program will ask whether to commit before continuing. This prevents ads still “under construction” from being picked up by a dump, manifest, ad tracking, etc.
 - WEBAD holds will automatically be converted to the default hold when payment is accepted, so that “Commit Ad” releases the ad for publication. If the hold is cleared manually, this will be confirmed with the user, with the default response being to open the payment screen so that the proper procedure can be followed.
 - New “preference ads” feature. One or more preference ads can be set up for a customer with a desired look and feel, as well as database attributes such as default rate code, contract code, etc. Whenever an ad taker selects a customer with preference ads, a list of those ads pops up. Any of them can then be copied to a live ad.
 - New “Price Reduced” feature for classified ads, similar to the “New Ad” feature, where a banner can be added on top of the classified ad the day the price is reduced.
 - A flat additional charge can be set up for a specific day on a last insertion billing ad. This can be used with the “Price Reduced” feature, where a charge needs to be applied as of the day the banner appears in the ad.

- **Flat charge upsells can be set up by classification**, including “New Ad” and “Price Reduced”. They can default to on or off, or be a forced buy. A special tab in ad entry comes forward, and the upsells can be checked on or off (unless a forced buy) in place of manually entering or deleting the flat charges.
- **Unexpired ads can now be renewed as well as copied**. A renewal will start after the original ad expires.
- Enhancements to the ad search screen include a “credit collector” field, so that collectors can search for their ads on hold and follow up on them before deadline.
- Automatic flat charges can be configured to go down to the publication level. This fixes allocation issues so that, for example, bold charges are allocated properly among publications when not all of them charge for bold.
- The option to copy schedules from one publication to another during ad entry is now set at the rate level, instead of the company level. The company level determines the rate default.
- When determining whether to put an ad on prepay hold, by default we take into account any outstanding credit balance on the account. If this is not desired, it can be turned off with a configuration variable.
- New fields have been added to the user setup table to determine what level of access a user has in ad entry for entering flat charge overrides, flat rate overrides, flat discounts and flat additional charges.

REPORTS:

- (Oct '09) New: Market Share Report
- (Oct '09) **Email of reports by default to requesting user**, or to a different user. Subject line reflects report title.
- (May '09) **Stored user defaults for reports now include dates and times**. Dates default to the same offset to the current date as the stored value has to the date when stored.
- (May '09) Improved user interface when saving report defaults: confirmation of save, and automatic popup of form to rename a new default set.
- (Jul '08) Ability to monitor a queue server from within Total Ad.
- (Jun '08) Ability to save a print file as a “sample” for illustration to other users.
- **Report queue allows users to manage their own entries**, including ability to show, hide, and quickly delete error entries, and to show only entries for the current user.
- **Parameter page standardized, and appended to all reports**. Header page, if configured, will be included on reports printed from the “Display Report” window. A future enhancement will allow the parameter page to be suppressed on a user by user basis.
- Ability to log all emails sent by the application software.
- Reports allow **multiple default sets per report per user**, which can be named as desired.
 - Ex.: there could be two default sets for the aging report: “Mid month aging” for all accounts during the middle of the month, and “Over-due aging” for overdue accounts after month end.
- Many reports now have an option to **create an ASCII file** that includes the main data fields from that report. A toolbar button causes a **spreadsheet with that data** to pop up on the user's screen after the report is finished.
- Error messages on servers automatically emailed to Vision Data, so we can follow up quickly.
- **New options in the statements program** include:
 - Print Co-op bills only
 - Combine each-insertion classified ads as a single line item on the statements
 - Print statements only for accounts with a balance greater than a certain dollar amount, to exclude small balance accounts from the statement run

What's New in Total Advertising
Version 4.0 improvements, continued (page 8 of 8)

- Print the Account # with a prefix (default is year and month YYMM of the statement), as the “statement number”. That way, the customer can get a unique statement # each month, which includes the account # for easy lookup should they call in with questions.
- Rate code added as a selection field on the Ad Edit Listing.
- Range of class codes added to the Mailgrams/Labels report, to send mailings to all advertisers who ran in certain classifications during a certain time, such as for an upcoming promotion.
- **New options for the Payment Edit Listing** include:
 - Range of dates, instead of one day or a whole accounting period. For example, it can be run for 2 weeks within a period, or even crossing periods.
 - Include/exclude bad debt accounts
 - Salesperson selection
- **New options for the Advertiser Listing** include:
 - Sort by zip code, or select one zip code
 - Sort by contract account #
 - Include balance info on the report. If an account is shared across profit centers, that means the outstanding balance in the profit center the report is run from
 - Summary report (one line per account)
- **New options for the Transaction Edit Listing** include:
 - Sort by salesperson/transaction date
 - Department code and batch code as selection items and sort options
 - Range of dates, instead of one day or a whole accounting period. For example, it can be run for 2 weeks within a period, or even crossing periods.
- **New options for the Aging Report.** A major option is if the report is now run and the salesperson was looked up from the history as opposed to the salesperson on the account, then the aging amounts reflect the items sold by that salesperson only, not all activity on that account. Other new options include:
 - Specific SIC code
 - Specific geographic area
 - Specific credit collector
 - Specific credit status
 - Specific country code
 - Include only certain types of advertising. For example, run the report for display advertising only, and exclude classified dollars.
- Option to run the ad layout manifest for one section code only