SOP

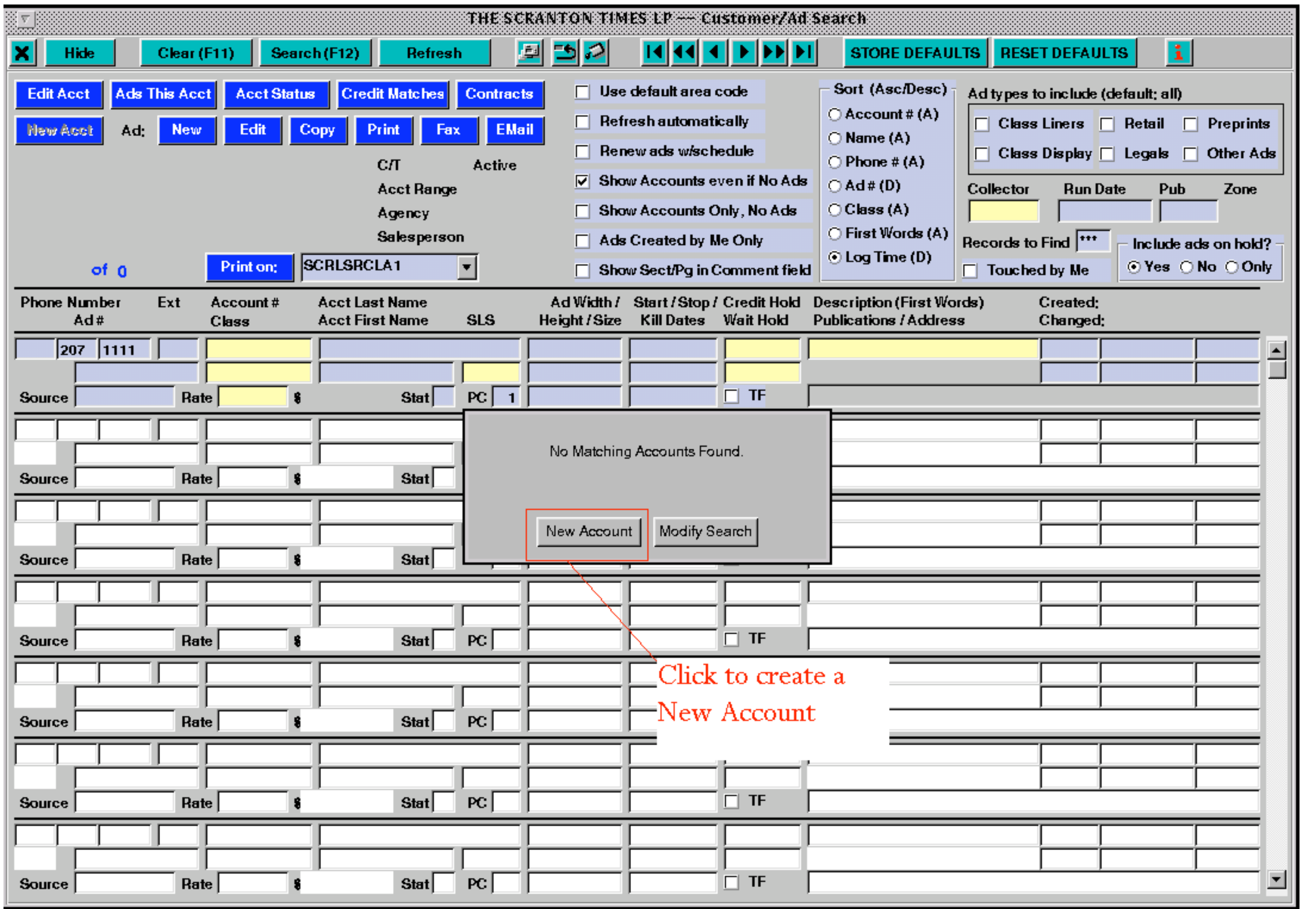
New Account

Explanation:
Until proper creation of accounts can be automated to the default settings required by accounting, the following procedures must be followed by sales reps and assistants using ad order entry in order to properly create new accounts.

[1] Enter Client Telephone Number in the "Customer/Ad Search Screen"

> After checking all profit centers, if no account or ad is found for the telephone number, a prompt box "No Matching Accounts" will appear with two (2) options, "New Account" and "Modify Search"

> Select "New Account"



[2] Proper settings for Transient, Commercial and National Accounts

[2.1] Transient Accounts

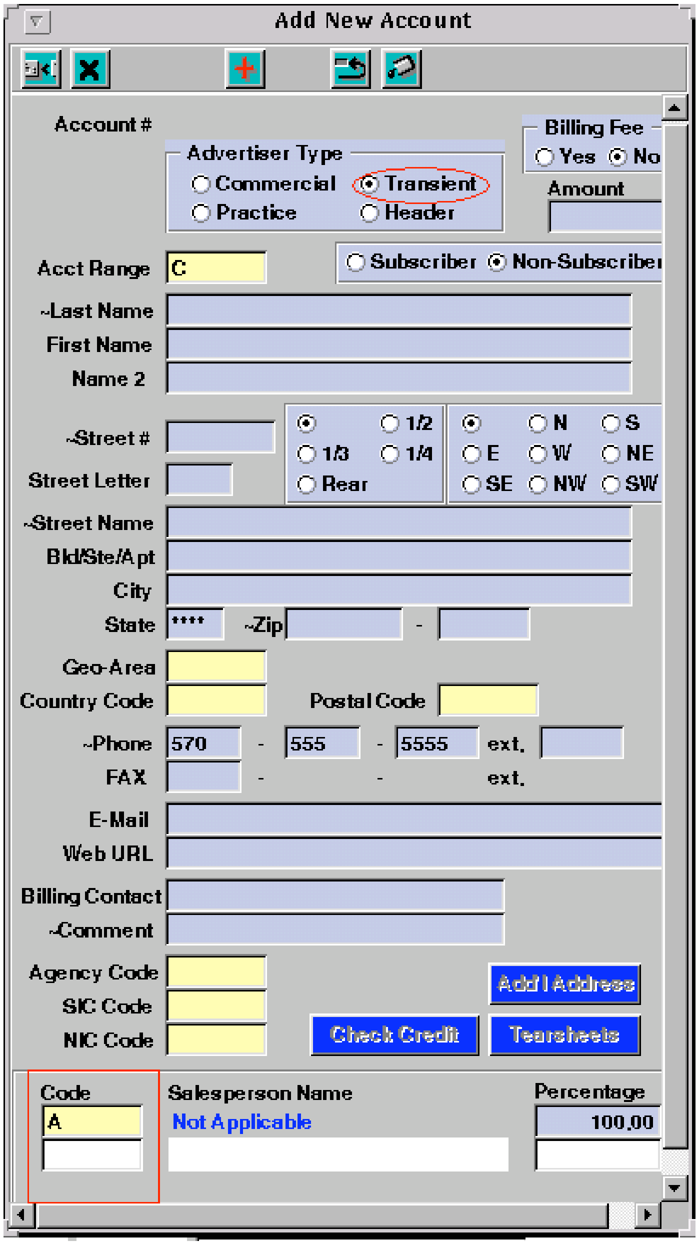
If the account is Transient (Private Party, Non-Business)

> On the "Add New Account" screen, under "Advertiser Type" select "Transient"

> On the bottom of the "Add New Account" screen under "Code" enter "A" (Note: Transient Account do not have assigned sales reps)

> Under "Advertisers" > "Advertiser Maintenance" **(See Page 5)**

Ensure "Finance Charge" is checked "No"

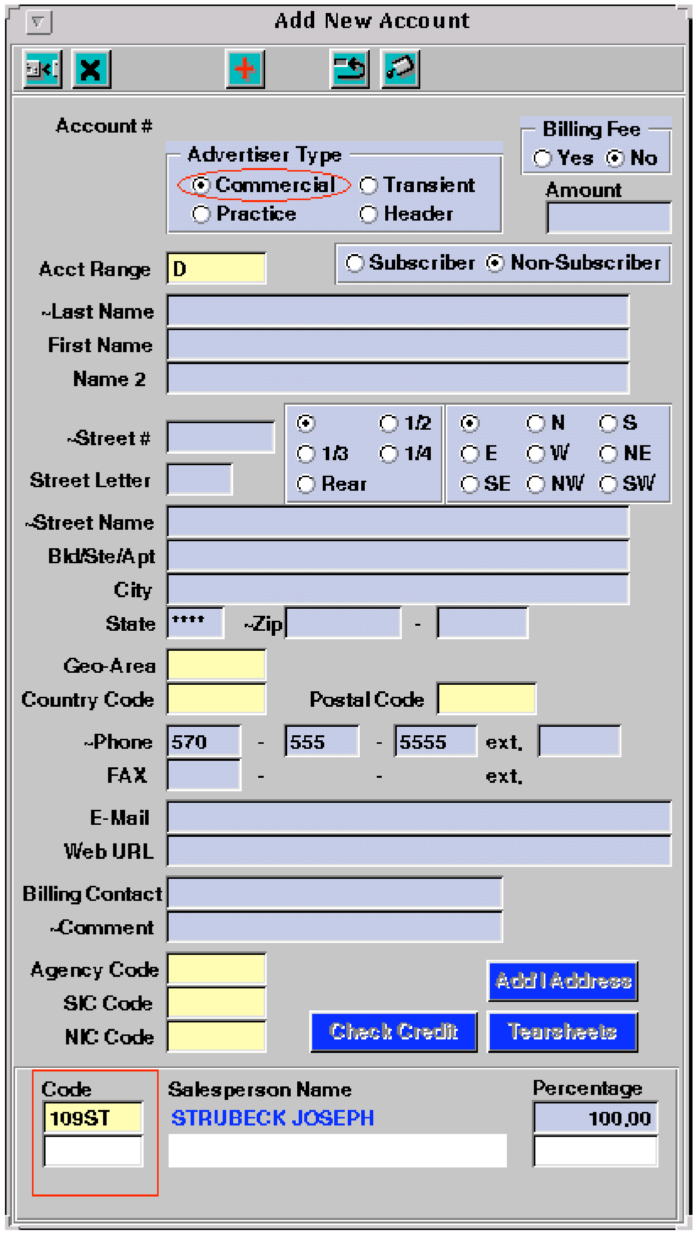


[2.2] Commercial Accounts

If the account is Commercial (Businesses)

> On the "Add New Account" screen, under "Advertiser Type" select "Commercial"

> On the bottom of the "Add New Account" screen under "Code" enter the Sales Person Code (ex. "100ST") using the proper code for the salesperson assigned to the account. (Note: All Commercial Accounts ***MUST*** have assigned sales reps)
> Under "Advertisers" > "Advertiser Maintenance" **(See Page 5)**
Ensure "Finance Charge" is checked "Yes"

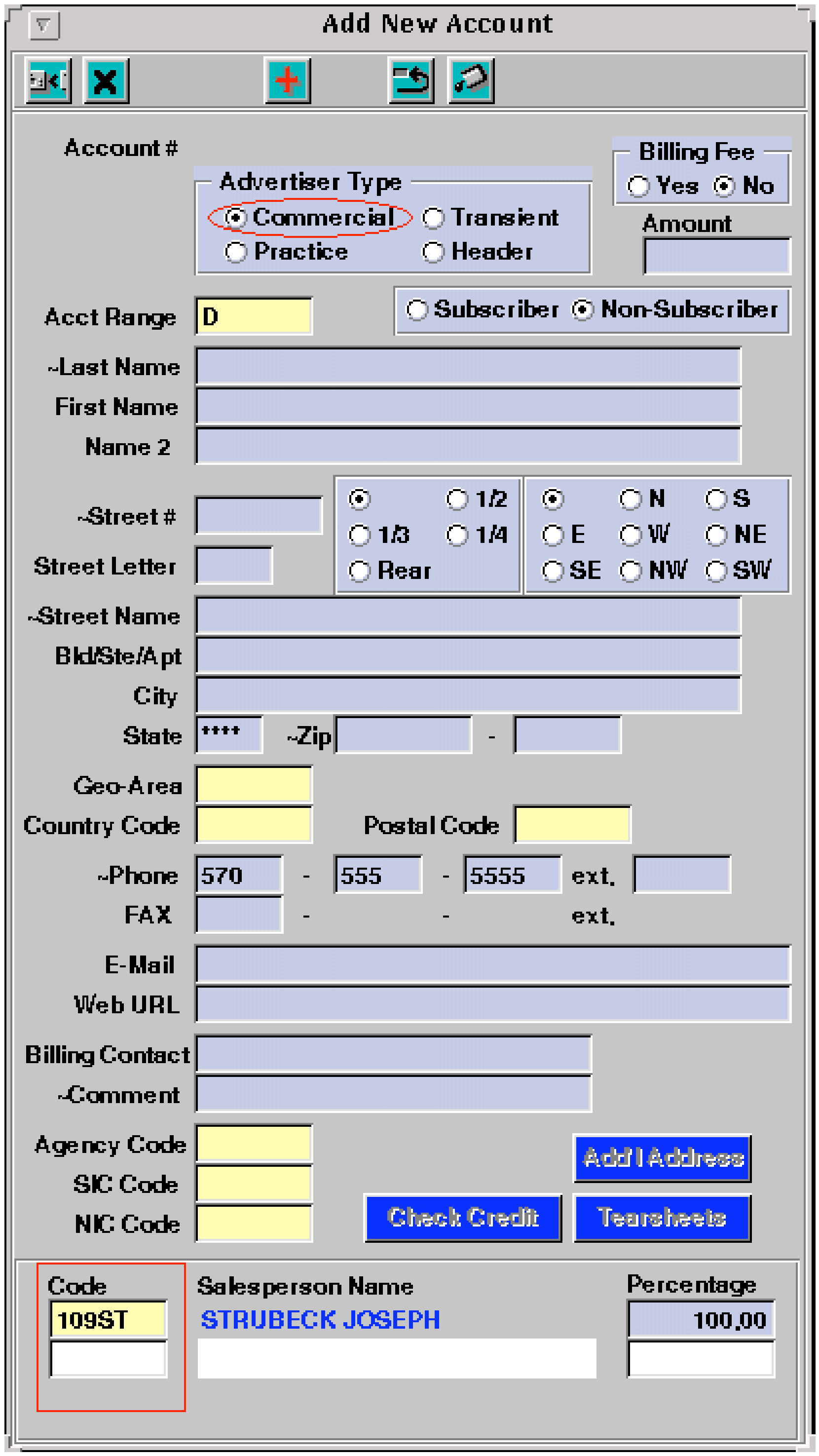


[2.3] National Accounts

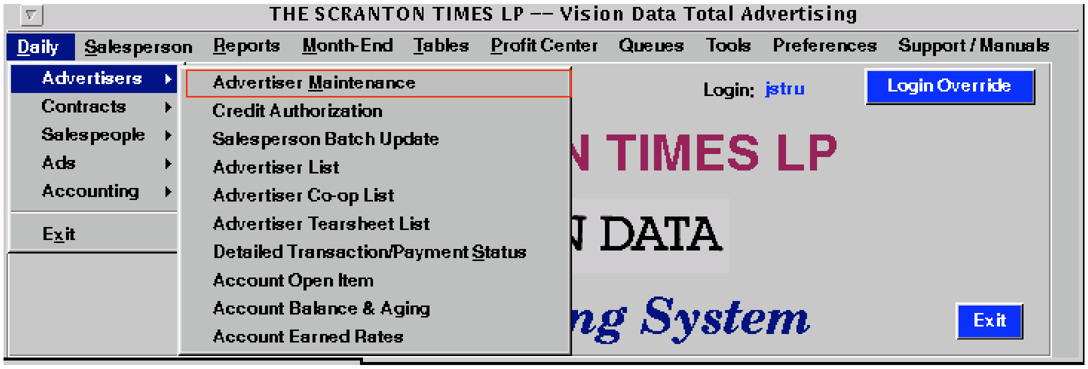
If the account is National (Agency)

> On the "Add New Account" screen, under "Advertiser Type" select "Commercial"

> On the bottom of the "Add New Account" screen under "Code" enter the Sales Person Code (ex. "100ST") using the proper code for the salesperson assigned to the account. (Note: All National Accounts ***MUST*** have assigned sales reps)
> Under "Advertisers" > "Advertiser Maintenance" **(See Page 5)**
Ensure "Finance Charge" is checked "No"



[3] Setting Account Type & Finance Charge:
Daily > Advertisers > Advertiser Maintenance
This opens the "Advertising Master" Screen



Account Type on "Advertising Master" Should be filled in:

Transient (Private Party): A Commercial (Local Businesses): LOC National: NAT

Finance Charge Box on "Advertising Master" should be checked *Yes or No* accordingly:

Transient: No Commercial: Yes National: No