

# 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"

The screenshot shows the 'Customer/Ad Search' interface. At the top, there are navigation buttons: Hide, Clear (F11), Search (F12), Refresh, and STORE DEFAULTS/RESET DEFAULTS. Below these are several tabs: Edit Acct, Ads This Acct, Acct Status, Credit Matches, and Contracts. A search criteria section includes fields for C/T, Active, Acct Range, Agency, and Salesperson. A 'Print on:' dropdown is set to 'SCRLSRCLA1'. On the right, there are sorting options (Account #, Name, Phone #, Ad #, Class, First Words, Log Time) and checkboxes for 'Ad types to include' (Class Liners, Retail, Preprints, Class Display, Legals, Other Ads). A table of results is visible, with columns for Phone Number, Ad #, Ext, Account #, Acct Last Name, Acct First Name, SLS, Ad Width / Height / Size, Start / Stop / Kill Dates, Credit Hold / Wait Hold, Description (First Words) / Publications / Address, and Created / Changed. A modal dialog box is overlaid on the table, displaying 'No Matching Accounts Found.' and two buttons: 'New Account' and 'Modify Search'. A red arrow points from the 'New Account' button to the text 'Click to create a 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"*

The screenshot shows the "Add New Account" form with the following details:

- Advertiser Type:**  Transient (circled in red)
- Billing Fee:**  Yes  No
- Acct Range:** C
- Subscriber:**  Subscriber  Non-Subscriber
- Code:** A (circled in red)
- Salesperson Name:** Not Applicable
- Percentage:** 100.00

**[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"*

**Add New Account**

Account #

Advertiser Type  
 Commercial  Transient  
 Practice  Header

Billing Fee  
 Yes  No  
 Amount

Acct Range   Subscriber  Non-Subscriber

-Last Name   
 First Name   
 Name 2

-Street #   1/2  N  S  
 1/3  1/4  E  W  NE  
 Street Letter   Rear  SE  NW  SW

-Street Name   
 Bldg/Apt   
 City   
 State  - Zip  -

Geo-Area   
 Country Code  Postal Code

-Phone 570 - 555 - 5555 ext.   
 FAX  - - ext.

E-Mail   
 Web URL

Billing Contact   
 -Comment

Agency Code    
 SIC Code     
 NIC Code

| Code                               | Salesperson Name     | Percentage           |
|------------------------------------|----------------------|----------------------|
| <input type="text" value="109ST"/> | STRUBECK JOSEPH      | 100,00               |
| <input type="text"/>               | <input type="text"/> | <input type="text"/> |

### [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"*

**Add New Account**

Account #

Advertiser Type  
 Commercial  Transient  
 Practice  Header

Billing Fee  
 Yes  No  
 Amount

Acct Range   Subscriber  Non-Subscriber

-Last Name   
 First Name   
 Name 2

-Street #   1/2  1/3  1/4  Rear  
 N  S  E  W  NE  SE  NW  SW

Street Letter

-Street Name   
 Bld/Ste/Apt   
 City

State  -Zip  -

Geo-Area

Country Code  Postal Code

-Phone  -  -  ext.   
 FAX  -  -  ext.

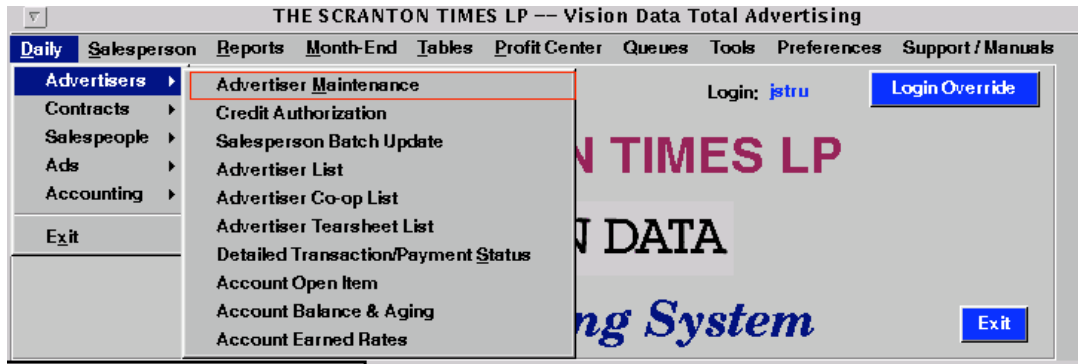
E-Mail   
 Web URL

Billing Contact   
 -Comment

Agency Code    
 SIC Code   
 NIC Code

| Code                               | Salesperson Name                             | Percentage                          |
|------------------------------------|--|-------------------------------------|
| <input type="text" value="109ST"/> | <input type="text" value="STRUBECK JOSEPH"/> | <input type="text" value="100.00"/> |
| <input type="text"/>               | <input type="text"/>                         | <input type="text"/>                |

**[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

