

proposals marketing

User Manual

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Account Creation and User Management

Required Information:

1. First and Last name
2. Email address
3. Permission level (what entities can they view; customer, division, etc.)

Administrative Contact (request access):

1. User creation and maintenance is the responsibility of the designated administrative contact for the partnership that owns the relationship with AdCellerant; submit a ticket to the AdCellerant Support Portal if you do not know who your designated administrative contact is
2. Existing users may create logins for any level below their own (e.g. Division user can create a Customer login for their client to access the dashboard directly)

User Creation:

1. Click "Users" on top navigation bar
2. Click green "New User" button
3. Enter Username (default is first initial last name no spaces or special characters; "jdoe"), Email address, and Password (can be changed by user)
4. Select User Type and Partner/Division/Customer relationship from dropdown
 - a. Admin AdCellerant
 - b. Ops Partner
 - c. Division Property
 - d. Customer Customer
5. Select visible Chart Groups
6. Click "Save Changes"

The screenshot shows the 'New User' form in the AdCellerant system. The top navigation bar includes 'DASHBOARD', 'USERS', 'ORDERS', 'ACCOUNT', and 'LOGOUT'. The 'USERS' tab is active. A green 'New User' button is prominently displayed. The form fields are as follows:

- Username:** demo
- E-mail:** demo@reports.marketing
- Send Confirmation E-mail:**
- Password:** [Redacted]
- Confirm Password:** [Redacted]
- Advanced Options:**
 - User Type:** Ops
 - Partner:** Demonstration Account
- Permissions:**
 - Charts & Data:** Performance, Creatives, Geography, Categories, Browseres, Time and Day, Data Elements, Recency, Sites
 - Search:** Performance, Ads, Keywords, Geography, Browseres, Time and Day
 - E-mail:** Campaigns, IP Targeting, Performance, Google Analytics, Acquisition, Demographics, Geography, Goal, Ecommerce
- User control:** Block this user

User Management:

1. Click "Users" on top navigation bar
2. Use search bar to find desired user
3. Click "Edit" next to the desired user
4. Edit as necessary
5. Select "Block this user" when no longer active
6. Click "Save Changes"
7. User can click top navigation "Account Settings" to change password

Users

Username	E-mail	Blocked	Edit
allan_test_4	allan+test4@devetry.com		Edit
test_user	britchey@adcellerant.com		Edit
t_admin	t_admin1		Edit
kate	kmartin@adcellerant.com		Edit
shelby	shelby@adcellerant.com		Edit
tlyon	tlyon@adcellerant.com		Edit
bfarmer	bfarmer@adcellerant.com		Edit
...

adcellerant DASHBOARD USERS ORDERS ACCOUNT LOGOUT

Edit test_user

[Save Changes](#) [Cancel](#)

Username:

E-mail:

Password:

Advanced Options

User Type:

Permissions

Charts & Data

Display

- Performance
- Creatives
- Geography
- Categories
- Browsers
- Time and Day
- Data Elements
- Recency
- Sites

Search

- Performance
- Ads
- Keywords
- Geography
- Browsers
- Time and Day

E-mail

- Campaigns
- IP Targeting
- Performance
- Google Analytics
- Acquisition
- Demographics
- Geography
- Goal
- Ecommerce

User control

- Block this user

Basic Functions

Identify Unfinished and Completed Proposals:

1. Click "Proposals" on top navigation bar
2. Headers are sortable
3. Default sort is by "Date Created"

Proposals New Proposal

Status (All) Search... Mar 24, 2016 - Sep 24, 2016 MIN (\$261) - MAX (\$350000) Include Archived

▼ Date Created	Status	Name	Requested By	Customer	Date Requested	Budget Pitched	Archived
Jun 24, 2016	PROPOSAL UNPREPARED	Hoosier Hills Credit Union - Fri Jun 24 2016 16:36:18 GMT+0000 (UTC)	Ian Wilson	Hoosier Hills Credit Union	Jul 1, 2016		
Jun 24, 2016	PROPOSAL UNPREPARED	Jumbo Luxury Auto - Fri Jun 24 2016 16:09:57 GMT+0000 (UTC)	Alexis Guillen	Jumbo Luxury Auto	Jul 1, 2016		
Jun 24, 2016	PROPOSAL UNPREPARED	Product Testing Account - Fri Jun 24 2016 15:31:08 GMT+0000 (UTC)	demo	Product Testing Account	Jun 24, 2016		
Jun 24, 2016	PROPOSAL UNPREPARED	CSI Video - Fri Jun 24 2016 15:28:19 GMT+0000 (UTC)	Jazz Santana	CSI Video	Jul 5, 2016		
Jun 24, 2016	PROPOSAL READY	Product Testing Account - Fri Jun 24 2016 15:14:20 GMT+0000 (UTC)	Trent Lyon	Product Testing Account	Jun 24, 2016	\$60,000	
Jun 24, 2016	PROPOSAL READY	Allan test customer - Fri Jun 24 2016 15:01:00 GMT+0000 (UTC)	Barry Ritchey	Allan test customer	Jul 1, 2016	\$50,000	

4. Search bar searches Name, Requested by, and Customer fields
5. Archive function will remove from view
6. Date range relative to the Start date of the proposed campaign
7. Budget pitched only appears if a Total Budget is entered

Start a New Proposal:

1. Click "New Proposal" button
2. Enter all requested information in fields provided
3. Click "Submit" button at bottom of page
4. Once submitted it will then appear in the proposals list page

New Proposal

id	Requested By	Total # Pitching
16	Shelby	
	jchamberlin	
16	brockberry	43000

Edit an Existing Proposal:

1. Navigate to proposals list
2. Click linked "Name" of the desired proposal
3. System will load the "Proposal edit" page
4. You may now edit values or click "Back to Step 1" button to restart process

Proposals

Ticket #	Status	Date Created	Name	Customer
--	PROPOSAL UNFINISHED	May 18, 2016	Product Testing Account - Wed May 18 2016 21:30:43 GMT+0000 (UTC)	Product Account
--	PROPOSAL UNFINISHED	May 18, 2016	Product Testing Account - Wed May 18 2016 18:48:37 GMT+0000 (UTC)	Product Account
--	PROPOSAL READY	May 18, 2016	VStar Entertainment - Wed May 18 2016 11:57:51 GMT+0000 (UTC)	VStar Entertai
--	PROPOSAL UNFINISHED	May 18, 2016	Product Testing Account - Wed May 18 2016 11:42:23 GMT+0000 (UTC)	Product Account
--	PROPOSAL READY	May 17, 2016	Product Testing Account - Wed May 18 2016 00:16:48 GMT+0000 (UTC)	Product Account

Proposal New Spec Ad

Edit

Back to Step 1

Campaign Goal

Branding
 Informational
 Direct Response

You have selected Informational as your advertiser's goal. Informational campaigns prioritize clicks and will include the Competitive bundle with Behavioral and Category targeting by default.

Products

Values will adjust to selections automatically unless a manual selection is entered on a product line, in which case any additional adjustments must be made manually as well. Alternatively, please use the "Reset Values" button to return to recommended values.

Display

Available

\$46,167
Budget

Budget

\$46,167

Proposed

100%
Share

Available Budget

\$109,921
All budget numbers are for the entire date range selection (not monthly).

Total Budget

Saving a Configured Proposal:

1. Configure proposal to desired values
2. Resolve any errors returned
3. Click green "Save" button on right hand module
4. System will load printable version of the proposal

Available Budget: \$109,921 (6/1/2016 to 6/1/2016). All budget numbers are for the entire date range selection (not monthly).

Total Budget

Product: Display, Budget (0 to 100% share)

Display: \$46,167

Search: \$27,480

SEO: \$12,483

Email sends per drop date: One or more of your email drop dates which is the minimum number per drop date. Drop date email sends must add up to total budget.

Save

Print or Save a Completed Proposal:

1. Click "Print"
2. A module to include custom sales materials will appear
3. Make sales material selections
4. Select "Print" button

PROPOSAL READY
 Product Testing Account - Wed May 18 2016 21:30:43 GMT+0000 (UTC)


Proposal: New Spec Ad
 Edit View Print

Product Testing Account

Type: Informational
 Industry: Food & Drink
 Timeline: 6/1/2016 - 12/31/2016
 Total investment:

Display

Name	Platform	Target	Geography	CPM	Total Impress
Informational	Competitive (Content + Geo + Demo + Behavior + Retargeting)	Content - Food & Drink Behavior - Interest > Food & Drink > RestaurantsInterest > Food & Drink > Restaurants > Family RestaurantsInterest > Purchase Behavior > Purchase Behaviors - Shopping > Purchase Behaviors - Shopping - Retail > Purchase Behaviors - Shopping - Retail - RestaurantsInterest & Activity > Food & RestaurantsInterest > Purchase Behavior > Purchase Behaviors - Shopping > Purchase Behaviors - Shopping - Retail > Purchase Behaviors - Shopping - Retail - Restaurants > Purchase Behaviors - Shopping - Retail - Restaurants - Fast FoodInterest > Purchase Behavior > Purchase Behaviors - Shopping > Purchase Behaviors - Shopping - Retail > Purchase Behaviors - Shopping - Retail - Restaurants > Purchase Behaviors - Shopping - Retail - Restaurants - Fine DiningInterest > Food Enthusiasts > Restaurant DinersDemographic > Household Income 50k+Past Purchases > Services > RestaurantsIntent > Services > Services - RestaurantsProducts & Services	Denver, Colorado, United States	\$8	5,770,8


5/19/2016

Sales Sheets

Display

Programmatic Display

IP Targeting

MicroProximity Targeting

Native Advertising

General

Email Marketing

Paid Search Management

Search Engine Optimization (SEO)

Differentiators

Inventory Quality

Google Analytics

Addenda

Data Elements

Search Keywords

Cancel
Print

5. A .pdf will generate
6. Click "View"

Print

Your proposal is ready.

[View](#)

Done

7. You may select "Print" or "Save" from your .pdf viewer

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Product Testing Account

5/19/2016
 Campaign Goal: Informational
 Industry: Food & Drink
 Timeline: 6/1/2016 - 12/31/2016
 Total investment:

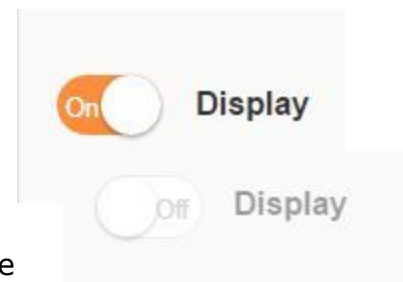
Advanced Functions

Step 1 Data Entry:

1. Customer
 - a. Search for your existing customer to access any existing associated data. Only create a new advertiser record if your advertiser has never run a campaign, otherwise you may not be able to access existing pixels and audiences.
2. Your Site
 - a. The URL of your advertiser's site copied from your browser's URL bar.
3. Top Competitor Sites
 - a. Enter the URLs of your advertiser's top three competitor's sites here (at least one required). Should absolutely include your client's industry leader. Please keep in mind that we can crawl text and not images, so all site entries should contain plenty of formatted text (selectable). It is also best practice to load your selected URLs into your browser and copy the site's address directly from the URL bar.
4. Target Locations
 - a. The intended geographical location of your campaign. You may select multiple.
 - b. DMAs are not available, may select multiple Cities or Counties as an alternative
 - c. Toggle selection to "Bulk Zip Codes" to enter ZIP list pasted from Excel
5. Target Industry
 - a. Your advertiser's industry and/or intended audience.
6. Keywords
 - a. Add up to 5 custom targets by keyword separated by commas.
7. Start and End Date
 - a. The start and end date of total flight of the campaign. Must account for product minimum timeframes (e.g. SEO=6 months, PPC=3 months, etc.). Individual product dates can be edited on the next screen but must fit within your total flight date selection.
8. Campaign Goal
 - a. Branding=Ad views, Informational=Clicks, or Direct Response=Conversions.
9. Demographics
 - a. Select any demo targets you would like to see included in audience recommendations.

Step 2 Customizing the Proposal:

1. Campaign Goal
 - a. Product recommendations change per goal selection
 - b. Each goal saves upon edits independently of each other
 - c. Changing to a different goal selection will result in different delivery values based on product pricing
2. Included products
 - a. Selected products are displayed in the pie chart on the right of the configuration module
 - b. Products can be selected and deselected by clicking the colored button next to each
3. Product values
 - a. Default return is 100% of determined estimated available universe
 - b. All budget numbers are for the entire date range selection (not monthly).
 - c. Can be changed manually inside of text field or by utilizing the sliders on the right of the page
 - d. Total budget is displayed along with "per line item" budget



Available	Budget	Proposed
\$2,326,468 Budget	\$2,326,468	100% Share

Line Item Name	Product	Budget	Proposed
Direct Response	Dominant (Content +)	\$1,163,234	116,323,400 Impressions
Start Date: 06/01/2016 End Date: 12/31/2016		CPM: \$10	

Product	Budget (0 to 100% share)
Display	\$2,326,468
Search	\$1,329,410
Email	\$997,058
SEO	\$26,750

Total Budget: \$5,539,210 (6/1/2016 to 12/31/2016)

All budget numbers are for the entire date range selection (not monthly).

Email sends per drop date

4. Custom products
 - a. You may add any internal custom product offerings here (e.g. owned inventory, web development, non-digital offerings, etc.). Free-form naming and rate fields should allow any additional custom products to be added in this section. These line items will be represented in addition to recommended Display, SEO, SEM, and Email budgets.

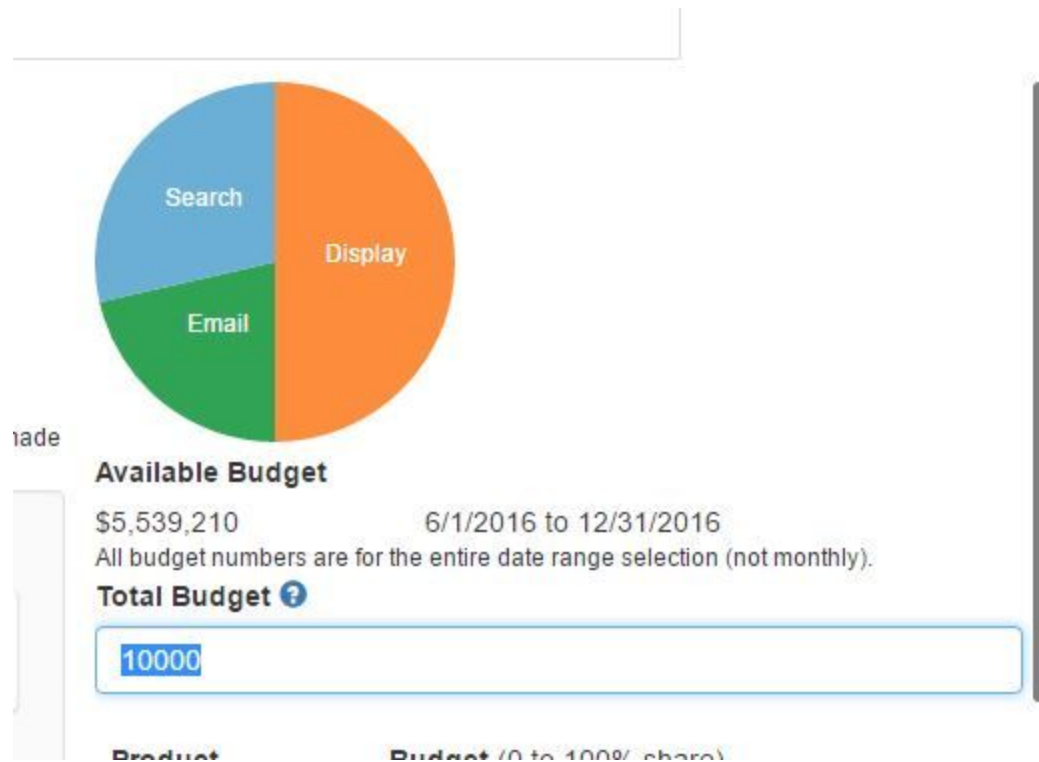
Custom Products

You may add any internal custom product offerings here (e.g. owned inventory, web development, non-digital offerings, etc.). Free-form naming and rate fields should allow any additional custom products to be added in this section. These line items will be represented in addition to recommended Display, SEO, SEM, and Email budgets.

Name	Description	Impressions	CPM	Budget
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> X

SEM, and Email budgets.

5. Entering client's desired budget
 - a. Add to "Total Budget" field
 - b. Values will automatically redistribute according to the defined allocation to each product



6. Resolving errors
 - a. Business rules and product minimums are built into the system
 - b. Errors are displayed when values don't match availability or product minimums
 - c. Check that date ranges match product minimums
 - d. Check that entered budget values don't exceed estimated available universe
 - e. Cannot save proposal until errors are resolved
 - f. Contact your Account Manager for support

L1100

SEO \$0

SEO packages

There are no viable SEO packages for your budget and number of locations. Please edit your number of locations or disable SEO.

Email sends per drop date

One or more of your email drop dates have sends under 50,000, which is the minimum number per drop date.

Email sends

Drop date email sends must add up to total contemplated email sends.

Save

Generating Sales Materials:

1. When printing a proposal you have the option to generate white-labeled sales sheets for each available product along with your proposal sheet.
2. Recommended to always include all relevant product sheets, "Differentiators", and "Inventory Quality" selections.

Customizing Partner/Division/Customer (ie. "entity") views

1. Only admin and sub-admin users can create new entities (Divisions, Customers, etc.)
2. Only admin and sub-admin users can access entity edit screens
3. Product selections only display product options (reports, proposals, scheduling) available to the partner/division

All Partners / [Redacted] / CHI / Customer List

CHI

May 23, 2016 - Jun 22, 2016 Share

Search CHI's customers by name New Customer

Display Search IP Targeting E-mail

Name	Display							Edit
	Ordered Impressions (MTD)	Ordered Impressions	Delivered Impressions	Clicks	CTR	eCTR	Pacing	
[Redacted]		250,080	334,964	421	0.13%	0.17%		Edit

Permissions

Use custom permissions

detailed reporting to the city level of where the display ad was served geographically

Reports

Proposals

Scheduling

Products

Inherit permissions

Styling

Primary Color

Secondary Color

Logo

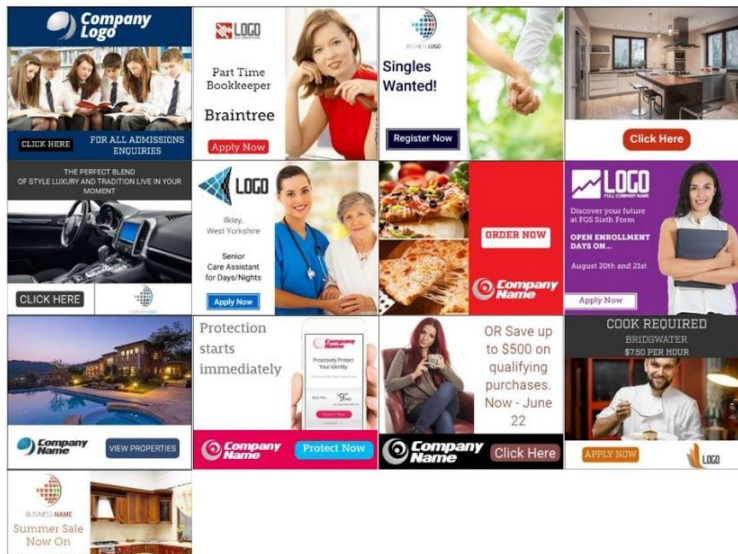
Creating spec ads

1. Must be enabled for the entity/user permission level, contact your account manager if you do not see the "New Spec Ad" tab
2. Click "New Spec Ad" and the creation interface will load after a warning message indicating a cost associated with generation (consult your account manager for specifics)
3. Choose a template by clicking on it
4. Customize;
 - a. Multiple messages for multiple frames
 - b. Call to action button (be mindful of space)
 - c. Upload main image

Proposal **New Spec Ad**

Edit

Ad Gallery



- d. Upload secondary images
- e. Upload logo
- f. Color scheme

Proposal **New Spec Ad**

Edit

Part Time Bookkeeper

message2

Braintree

cta

Apply Now

mainimage1



logo



Color Changes

theme

#e31b24



Change Template Selection

BACK

SAVE AD FOR LATER

CONTINUE

5. Click "Continue"
6. Wait for "Generating Preview" screen to align assets
7. Proof the ad;

