

## MultiAd Recas 7.0.5 Feature List

### Setup and other procedures

- 1) When choosing Setup from the Recas Main Menu you will see a new password protection feature (entitled 'Enable Password System') Enabling this feature will require you to enter a username and password before entering into the system.

\*Once you enable this feature, make sure to assign a username and password to your user profile. The system will prompt you to Review Users, Products, Reps and Rates. Choose yes. Once you are on the Recas Users page, choose (or create) your user profile. Within the user profile you will see a new username and password field. Type in your preferred username and password and click 'Save'. Now when you restart the Recas software, it will prompt you to enter that username and password. You can also gain access to your user profile by going to Recas in the menu bar and choosing Recas Users.

\*\*This new feature is completely optional. If you choose not to have a username and password assigned, simply leave the 'Enable Password System' unchecked.

If you happen to forget the username and password that you have assigned yourself, have no fear. Simply contact Ryan Stevenson at (800) 245-9278, ext. 5385. A temporary username and password will be assigned to you to obtain re-entry into the Recas system.

- 2) Clicking Backup on the Recas Main Menu now allows you to change your backup location if so desired. This was implemented to allow users to save a backup file to a location other than their local machine. If you choose to continue to backup to your local machine, simply click 'Backup' from the confirmation window.
- 3) A new label file exists entitled 'Avery5160-For-Claim\_SubmitTO\_address.' If you print labels from Recas, this new label will print the address that is displayed within your claim record.

### Advertisers

- 1) When opening Advertisers from the main menu, they will no longer load against claims entered. This update process now takes place after a claim has been saved on the claim entry side. When you open your Advertisers, they will open instantaneously and not check against your claims.

- 2) Established Date is now available on Advertiser Record. This date field can be used for listing dates in which the company went into business. This is great for compiling and evaluating good vendor opportunities. The established date will print on both the Advertiser Detail and Advertiser List Reports. You can also search on this criteria within the Advertiser's Advanced Query.
- 3) You may now edit an Adv ID without the system detaching the advertisers from all existing claims. This will also keep all attached manufacturers intact. When you wish to update an Advertiser ID, simply click on the Edit ID link within the advertiser record, enter the new ID and click ok. The system will then update all records accordingly.
- 4) Click on any attached manufacturer plan from within your advertiser record and you will see a new Submit Claim To: option. Once you have designated a Claim To: recipient (Mfr., Distributor or Mfr. Rep), this will then display automatically when entering claims for that mfr. for that advertiser. This way you do not have to recall during claim entry whether or not the claim gets submitted to a secondary party. Once it is noted and saved within your advertiser record, the appropriate claim to: address will then appear when entering claims.

## **Accrual Reports**

- 1) New Request Status functionality is now available within Accrual Reports. The only criteria that must be met prior to using this new feature is to have your E-mail Setup within Setup (on the main menu) enabled. Test e-mail to make sure your settings are correct. If you have troubles with e-mail setup, please contact your information systems person at your media for assistance in this setup.

Once the E-mail setup tests out ok, you can now highlight an accrual or accruals within the accrual list view and hit the 'Request Status' button. You must choose the e-mail in which the status must be sent back to. If your e-mail address is not listed, please set up yourself as a Recas user. You can do this by going to the menu bar under Recas and choose Recas. Add yourself as a user and make sure to input an e-mail address. Once you do this, you will then be able to choose this e-mail when using the 'Request Status' feature. Once the accrual status is sent to Recas, we should be able to supply you an update on those accruals within that same business day. Please do not request a status on accruals until the fifth business day has expired. Our accrual turnaround still stands at 3-5 business days. After the fifth business day, you may request a status on any submitted accruals.

## **Regional Plans**

- 1) Now available on the regional plan entry screen is a regional plan counter. This counter displays the last regional plan entered so you do not have to recall from memory what the ID# was for the last regional plan you entered. This counter is available on the Regional Plan entry screen and is entitled "Last ID =."

## Claims

- 1) Within the Ad Run area of claims you may now choose a media product by typing in the first few letters in the media product field and tabbing over to the next field. The media product will then appear within that field. If there are multiple media products starting with the same letter, Recas will pop up a window prompting you to select the appropriate media product.
- 2) Within the Ad Run area of claims you may now duplicate any ad line. An 'Add' button has replaced the existing way of entering multiple ad dates. Clicking on 'Add' (or hitting the enter key on a PC when situated on the 'Add' button, Command-A on Mac OS X...OS 9 users must click on 'Add' with the mouse) you can enter the number of ad lines you would like to display. Simply type in the number of ads from the 'Create' box and hit the add button. If you enter Create '2' ad run(s) Recas will produce two additional line items. One line item will always automatically appear when entering a claim. If you desire multiple ad lines, you must choose the new 'Add' button.

If you choose to duplicate ad lines, you may do this within 7.0.5. For example, simply type all the ad data on your first ad line. Now let's say you would like to replicate that first ad line three times. Click the 'Add' button. After clicking the 'Add' button, choose Create '3' ad run(s) and click the checkbox next to the replicate line #1. This will create three versions of line item #1. It is then up to you to manually change all the ad dates and order numbers. You may replicate any line item for which ad data is associated. All line items are now represented by a number on the far left hand side next to the ad date for easier association and on-screen display.

If you choose user chooses to remove any line item you must simply click on the 'Rmv' box for whichever line item you choose to remove. Once the 'Rmv' box is checked you may then click the 'Rmv' button located next to the 'Add' button displayed above the ad line items and that line item will be removed.

- 3) Also for easier claim duplication a 'Dup' button has been added on the claim entry side in case you want to duplicate a claim scenario in which just the Advertiser, Total Units, Manufacturer and Manufacturer Units are duplicated.
- 4) You may again produce a claim within claim entry for a \$0.00 amount if you choose. However, when an ad line item with an Ad Rate of 0.00 is saved within Recas 7.0.5, you will get a screen prompt displaying the following "One of

your Ad Run(s) has no ad rate. Save Anyway?” Simply click “Return” or “Save.”

- 5) In 7.0.5, if a you add plan notes from a co-op plan in the Recas Database the Plan Notes link will now be noted with a red asterisk when entering claims. This will remind you that plan notes exist for the manufacturer in which you entering a claim.
- 6) Within claims list view you can now link manufacturers directly to an advertiser without having to refer back to the advertiser record itself. Simply choose the claim(s) from within claim view that you wish to link the manufacturer back to your advertiser. Once your selection has been chosen click the ‘Plan Linker’ button located at the bottom right-hand side of your claims list. Once you click on this button, the system will prompt you “There are X Advertiser Records to Create”. Either click on the ‘Create them’ link or hit ‘cancel.’ If you choose ‘Create Them’ the Recas system will prompt you to enter an account number for each manufacturer. If you do not have an account number, but still wish to link the manufacturer, simply click ‘Link’. If you have an account number, enter that number and then click ‘Link’. If you do not have an account number and only wish to attach the manufacturer with an account number, click ‘Skip. Clicking ‘Skip’ will not link the manufacturer to the advertiser.

\*A note with this new linking feature. All claims that already have the manufacturer attached to the advertiser will be noted within Claims list view by a green asterisk. This will be very helpful in pinpointing which manufacturers are not associated to an advertiser. No asterisk means the manufacturer plan is not linked to the advertiser.

### **E-Claims**

- 1) You may now produce an e-claim from within Recas and only e-mail to the advertiser. Prior in version 7.0.3 users had to choose a manufacturer E-Claim E-mail. This is no longer mandatory in 7.0.5 when clicking on e-claim and choosing e-mail from the E-claim list view.
- 2) Recas 7.0.5 allows for each media listed in Recas to have their own unique e-tearsheet code if applicable. This can now be set up through Recas Setup.

### **Import/Export Routines**

- 1) New Import/Export Routines now exist for the Regional Plans and Advertiser Reps area in Recas.
- 2) All import routines now include options to 1) Block and Report Duplicate records 2) Replace duplicates with Imported Records and 3) Import Duplicates.

Choosing option one will simply not import duplicate records and stop the import process when encountering a duplicate record. Choosing option two will replace your existing record (s) with the new import record (s). Choosing option three will import all duplicate record(s) leaving you with two instances of the same record.