PRISMA FOR SELLERS ENTERPRISE – Home Tab

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TABLE OF CONTENTS

1.   Overview

Prisma for Sellers is a direct line between sellers and buyers, enabling the sales process from RFP, proposals, revisions and order execution across linear and traditional media. All RFPs, proposals, orders and revisions are located in one dashboard with a direct electronic connection to Prisma for Buyers, reducing manual inefficiency from emailing, re-keying and manual data entry.

The Home tab allows the seller to view all aspects of Campaigns in one place. Sellers can view **Workflow**, **Approvals**, campaign **Distribution**, and **Recent Items** as well as **Orders**, **RFPs**, and **Proposals** from the home tab. Sellers are also able to filter and search each window easily find needed information.

2.   The Dashboard

1. Your custom dashboard consists of several windows that represent the various steps in the sales process. You are able to customize a unique dashboard that best assists your needs.

- **Activity Window** –All the RFPs, proposals, orders, and revisions are displayed in a customizable format in one of the four possible panes according to their position in your workflow.

- **Distribution Window** –Shows total, possible, probable, and booked budgets for items broken out by RFP, proposals, orders, and revisions. Information can be drilled down to view revenue distribution in greater detail.

- **Types of Business Windows** – Select whether to view only RFPs, proposals, orders, or order revisions by selecting the item type from the drop-down list.

- **Recent Items List** –Contains the last five items accessed in order of access with the most recent items at the top.

- **Approvals Window** – View all approval workflow proposals in one place.

3.   Activity Window

1. The Workflow window can include two to four panes of information, depending on preference.

2. Select the [icon] icon and the dropdown menu will show the pane configuration options. To resize the size of the panes, select the three dots and move to the desired size.
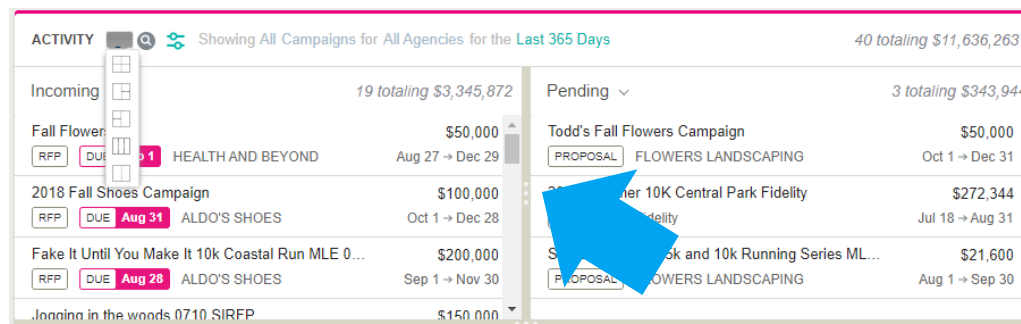

3. Each pane can include information for:

- **Incoming**: any RFPs that are arriving from a Prisma Agency.

- **Working**: items that are being worked on (open RFPs or unsent Proposals).

- **Pending**: proposal has been sent out to Prisma buyer and waiting for reject or approval of approval.

- **In Progress**: proposals that have been accepted and are now orders in progress.

4. To select which information is displayed in a pane, click the arrow next to pane type. A dropdown menu will open.
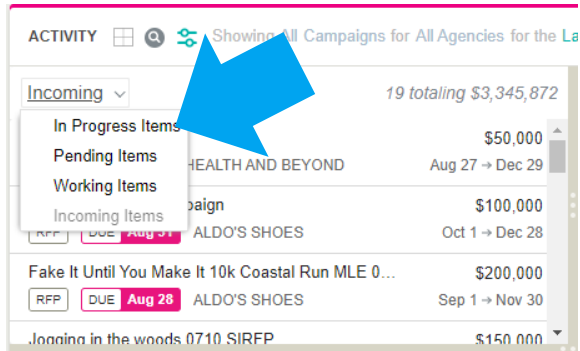

5. The Workflow window also includes a search bar as well as filtering options for **Campaigns**, **Agencies**, **time period**, and **campaign stage**. To choose filters, select the ⚙ button to reveal the filtering options.
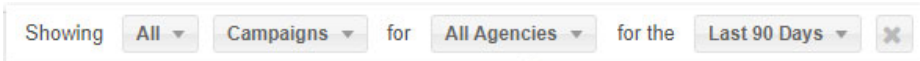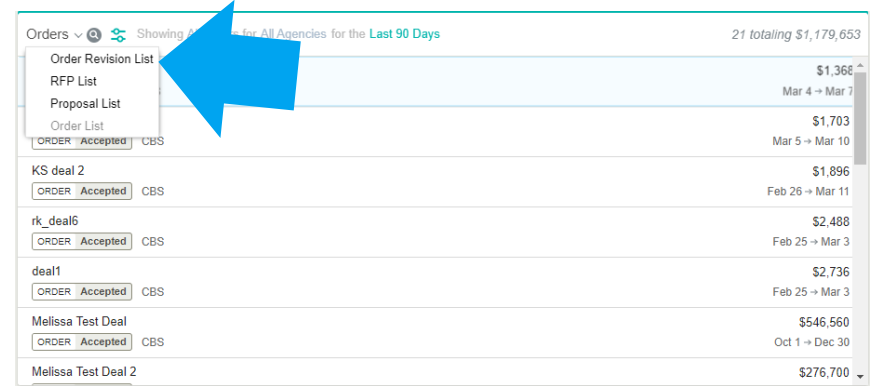

4. Distribution Window

1. The Distribution window includes search and filtering options for all Campaigns and Agencies during a specific time period.

2. In the Distribution window, Campaigns are shown in:

- Booked (blue); orders and order revisions

- Possible (pink): RFPs

- Probable (yellow): Proposals
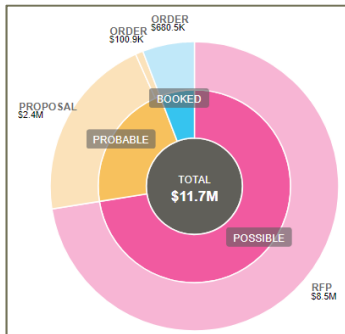
3. Selecting each color will drill down to show only that information.

5. Types of Business Window

1. The Types of Business window allows sellers to easily access an **Order Revision**, **RFP**, **Proposal**, and **Order** from the Home screen.

2. To choose, the seller select the business type from the dropdown window. Once the type of business is selected, a seller can use the search bar and filtering options associated with the business type.

6. Recent Items List

This window shows the last 5 items worked on.

7. Approvals Window

1. The Approvals window displays Proposal that need or have received internal approval before being sent to an agency. Proposal within the Approvals window will have one of three statuses:

    * **Approved internally**: submitted proposal has been internally approved.

    * **Submitted internally**: user has submitted a proposal and is waiting for it to be approved

    * **Rejected internally**: submitted proposal has been rejected internally.

2. The Approvals window also includes a search bar as well as filtering options for **Approvals**, **Agencies**, and **time period**.
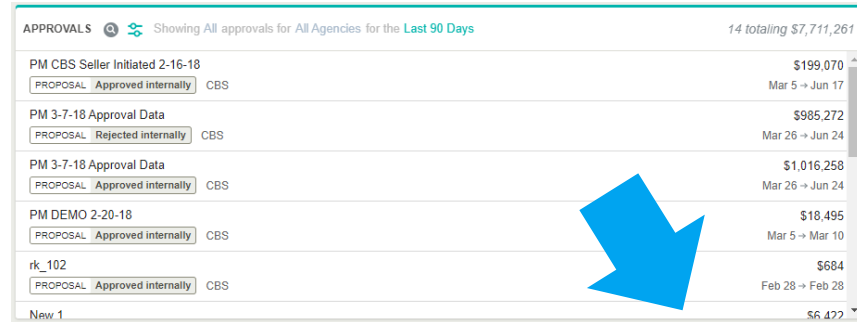
8. Default Tab Personalization

1. The Home tab is the default tab for all new users in PFSE.

2. To change your default tab to another, hover over the selected tab. The [star] icon will appear to the right of the tab name.

3. Click the star and when it becomes solid that tab is now the default.

4. The tab can also be moved within the header bar by dragging it into the desired position.

5. The Home tab is also divided into two spaces, which can be sized by clicking the [⋮] and moving it horizontally to make one space larger or smaller.

* *Whenever the spaces are resized, Prisma for Sellers automatically saves them as the new default view. To reset the panes, right click and select Reset Preferences.*

6. The Home tab windows can be moved around the Home page by selecting the top of each window and dragging and dropping the windows into a specific location.

7. To resize a window, grasp the bottom and drag to resize.

8. You can also hide a window's contents so only the header shows by clicking the white space at the top of the pane. To reveal the information, click the white space again.