Advert User Guide

Advert Actions

Add Advert

To start this action, click the   Add Advert   button above the Advert listing.

Creates a new Advert.

When this action starts a form is displayed to enter the details of the Advert.

Each field customises or controls some aspect of the Advert display or behaviour.

Some fields are required and must be entered before the Advert can be added, the required fields are Count Clicks, Count Impressions.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Advert you need to work on, and click the   🔍 View   button in the   ⋮   More Menu on that row.

Display the selected Advert.

This action displays the Advert similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Advert you need to work on, and click the   ✏   button on that row.

Edits an existing Advert.

When this action starts a form is displayed with the existing Advert and any previous information entered.

Each field customises or controls some aspect of the Advert display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Advert you need to work on, and click the   ⧉ Copy   button in the   ⋮   More Menu on that row.

Copies an existing Advert.

The selected Advert is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Advert to work on and click the   🗑   button on that row. Or CTRL+click to select multiple Adverts and click the   🗑   button above the Advert listing.

Deletes an existing Advert.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Advert.

Search

To start this action, click the   🔍   button above the Advert listing.

Allows a Search of Adverts.

This allows a simple text search across all Adverts.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Advert listing in the ⋮ More Menu.

Allows an Advanced Search of Adverts.

The Advanced Search opens a new section at the bottom of the Adverts and allows several distinct features:

- Multiple Search Lines : allows Advert matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Advert listing in the ⋮ More Menu.

Refresh the list of Adverts.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Advert listing in the ⋮ More Menu.

Export the Advert results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Adverts shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Adverts will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Advert listing in the ⋮ More Menu.

Export all the Adverts to a List.

Exactly as for "Export to List" except rather than just Exporting the Advert results shown, all Adverts will be expored.

Export Item

To start this action, select the Advert you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Advert to a List.

Exactly as for "Export to List" except rather than just Exporting the Advert results shown, only the selected Advert is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Advert listing in the ⋮ More Menu.

Changes the Columns shown in the Advert Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Advert Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Advert Listing.

Manage Filters

To start this action, click the ☰ Manage Filters button above the Advert listing in the ⋮ More Menu.

Creates custom Filters for Adverts.

A Filter is a saved Advanced Search. Multiple Filters can be created for Adverts.

These Filters appear at the top of the Advert listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Adverts where these can be managed.

Advert Field Reference

Count Clicks

This field is mandatory.

Set to count the number of click-throughs on any links in the advert and prevent display if the limit is reached

Count Impressions

This field is mandatory.

Set to count each time the advert is displayed and prevent display if the limit is reached

Tags

Select the tags that allow this item to be found as a related item when another item is displayed

Advert Span

Where the Advert List Item displays multiple adverts, this controls how many spaces in the Advert List Item this advert will occupy.

E.g. where an advert list item displays 8 advert spaces, this advert can span across 2 consecutive advert spaces. In which case 7 adverts will be displayed across the 8 advert spaces and this advert will occupy 2 spaces.

Multi span adverts may appear in a different order, as the adverts are placed to best fill the space available.

Attribute Set

The attributes in the selected attribute set will be made available to this item