

CENTRO'S BASIS PLATFORM

ONBOARDING GUIDE

A helpful step-by-step guide to show you how to integrate Centro's Basis platform into SBMS Digital for digital campaign billing and reconciliation.

THIS GUIDE DETAILS THE WORKFLOW STEPS BETWEEN CENTRO'S BASIS PLATFORM AND SBMS DIGITAL:

1. Creating estimates in SBMS Digital
2. Creating Media Plans in Basis
3. Pairing via the SBMS estimate number
4. Approving the Media Plan in Basis
5. Media Plan ingestion into SBMS Digital
6. Client Billing and Vendor Invoice Reconciliation

1. CREATE AN ESTIMATE IN SBMS DIGITAL

To begin the process, create an estimate in the Digital Estimate screen in SBMS Digital.

NOTE: You need to ensure the media type in the estimate matches the vendor media type.

The screenshot shows a web application window titled "Digital Estimate". The form contains the following fields and controls:

- Agency:** Dropdown menu with "API Test Agency" selected and a lightning bolt icon.
- Office:** Dropdown menu with "API Main Office" selected and a lightning bolt icon.
- Client:** Dropdown menu with "API Client" selected and a lightning bolt icon.
- Clear:** A blue button to clear the selection.
- Estimate #:** Dropdown menu with "2715 - Test Estimate for Screenshots" selected.
- New, Save, Delete:** Three blue buttons for managing the estimate.
- Estimate Description:** Text input field containing "Test Estimate for Screenshots".
- Product:** Dropdown menu with "API Product" selected and a lightning bolt icon.
- Media:** Dropdown menu with "Interactive" selected and a lightning bolt icon.
- Estimate Group:** Dropdown menu with "General" selected and a lightning bolt icon.
- Estimate Billing Code:** Empty text input field.
- Flight Start Date:** Date picker showing "8/19/2019".
- Flight End Date:** Date picker showing "12/31/2019".
- Landing Page Name:** Empty text input field.
- Landing Page URL:** Text input field containing "http://".
- Planner:** Empty dropdown menu.
- Account Manager:** Empty dropdown menu.
- Campaign Manager:** Empty dropdown menu.
- Estimate Comments:** Large empty text area for notes.
- Close:** A blue button at the bottom right of the window.

2. CREATE MEDIA PLAN IN BASIS

After creating your estimate in SBMS, create a media plan in Basis.

Strata Demo
Client not specified | Brand not specified | 09/01/19 - 10/31/19 | ID: STRADEM100

MODE: Overview | Analytics

Create media plan

\$10,000.00	\$1,810.00	1,405,000	\$1.29
target budget	gross total cost	imps	eCPM

Details Activity | Edit | Archive

OBJECTIVE: Brand Awareness | KPI: Cost per Completed View (CPCV) | GOAL: \$1,000

ACCOUNT TEAM: Kennedy Hyatt | NOTES:

TARGET BUDGET: \$10,000

STRATA ESTIMATE ID: 2715

Basis-Strata Demo
Basis Strata Test Client | Bertram's Test Brand | 09/01/19 - 12/30/19 | ID: STRADEM100

PLANNING Campaign status | Messages

Search...

DIRECT | Add properties | Delete Direct

VENDOR	PROPERTY	DETAILS	DATES	UNITS	RATES	COSTS
Lakin-Wisoky	accusamus	format: Audio, platform: Tablet	starts: 09/04/19, ends: 09/30/19	CPC rate type: 2,975 clicks	\$4.00 media, 15.00% margin, \$4.71 gross	\$11,900.00 media, \$2,100.00 gain, \$14,000.00 gross
		type: Ad Serving		CPM rate type: -- ad serv, -- est imps		
Lakin-Wisoky	accusamus	format: Audio, platform: Tablet	starts: 10/01/19, ends: 11/30/19	CPA rate type: 2,040 actions	\$2.50 media, 15.00% margin, \$2.94 gross	\$5,100.00 media, \$900.00 gain, \$6,000.00 gross
		type: Ad Serving		CPM rate type: -- ad serv, -- est imps		
				2,975 clicks	\$4.00 eCPC (media)	\$17,000.00 media

3. ENTER THE SBMS ESTIMATE NUMBER

Once your Media Plan is created in Basis, you can enter or select the SBMS estimate number.

Edit Campaign

Details Objectives Account Team

Target Budget*	Start Date*	End Date*
<input type="text" value="\$10,000.00"/>	<input data-bbox="699 884 980 932" type="text" value="09/01/19"/>	<input data-bbox="1013 884 1294 932" type="text" value="10/31/19"/>

STRATA

Strata Estimate ID

Notes (optional)

Share note with team members...

4. APPROVE PLAN

When you're ready to create a financial obligation and send the Basis Media Plan to SBMS, simply approve the Media Plan in Basis.

Approve Plan

Assign Client & Brand ✓ Assign Campaign ID ✓ **3 Attach Contract**

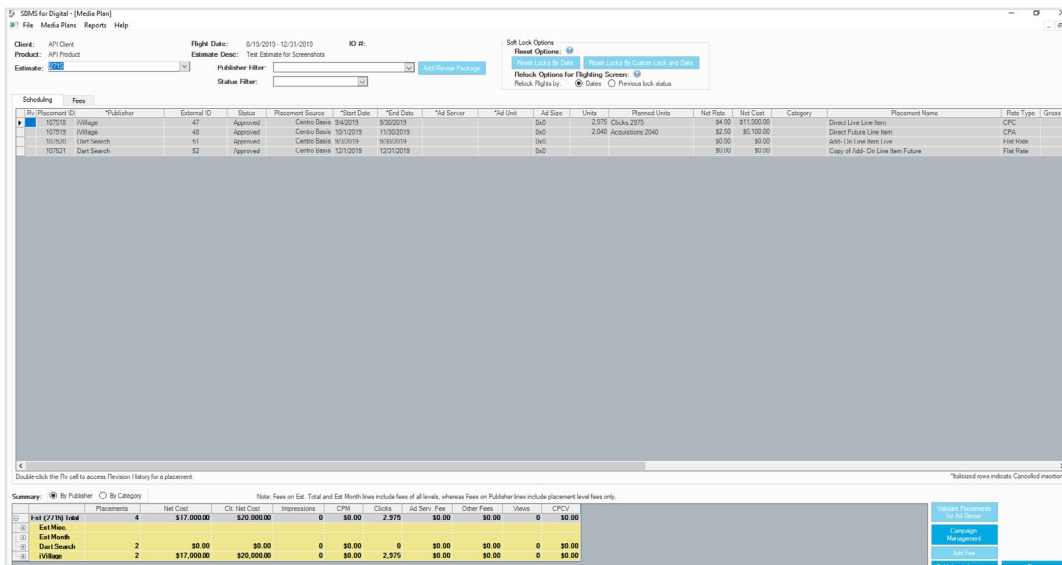
Attach a client contract to this plan.

[Attach contract...](#)

Export to Strata

5. MEDIA PLAN IS SENT TO SBMS

On Media Plan approval in Basis, the Media Plan is exported and ingested in SBMS for the attached estimate as Approved Placements.



Approved Placements are created with the following:

- Placement Source is Centro Basis
- External ID is the Centro Placement Line ID. This will be required for ingestion of Centro Basis metrics. Functionality for ingesting Centro Basis Metrics will be available in a future integration version.

Approved Placements will have the following columns locked to ensure costs are never out of sync between Centro Basis and SBMS. If they need to be updated, users can update in Centro Basis and Approved Revisions will export to SBMS as Revised Placements.

- External ID
- Placement
- Source
- Placement Name
- Start Date
- End Date
- Net Cost
- Units
- Cost Type

6. CLIENT BILLING AND VENDOR INVOICE RECONCILIATION

Approved Placement lines are ready for Client Billing and Vendor Invoice Reconciliation.

The screenshot displays the SBMS for Digital - Campaign Management interface. It includes a search and filter section at the top, followed by a table of placement lines. Below the table is a 'Fees' section and a 'Summary' table.

Est	Status	Est #	Description	Media	Client	Publisher	Placement ID	Start Date	End Date	Ad Unit	Ad Size	Placement Name	Section	Rate Type	Units	Actual Units	Net Cost	Last Modified
2715	Approved	2715	Test Estimate for Screenshots	Interactive	API Client	iVillage	107518	9/4/2019	9/30/2019		0x0	Direct Line Line Item		CPC	2,975	2,975	\$11,900.00	9/4/2019
2715	Approved	2715	Test Estimate for Screenshots	Interactive	API Client	iVillage	107519	10/1/2019	11/30/2019		0x0	Direct Future Line Item		CPA	2,040	2,040	\$5,100.00	9/4/2019
2715	Approved	2715	Test Estimate for Screenshots	Interactive	API Client	Dart Search	107520	9/3/2019	9/30/2019		0x0	Adx - On Line Item I		Flat Rate			\$0.00	9/4/2019
2715	Approved	2715	Test Estimate for Screenshots	Interactive	API Client	Dart Search	107521	10/1/2019	12/31/2019		0x0	Copy of Adx - On Li		Flat Rate			\$0.00	9/4/2019

Est	Est #	Fee ID	Fee Level	Fee Category	Fee Vendor	Fee Name	Placement Detail	Fee Type	Net Rate	Unit Type	Add Flat Fee	Fixed Flat Fee	Fee Frequency	Entered Fee Amount	Commissionable?	Commission Type	Commission %	Commission \$	Fee Amount	Fee with Commis
2715	1173		Placement	Alternate Ad Se Dart Search	Alt. Ad Serving Fee - Entered	Dart Search, 107520_09/03_09/30_Ads	Flat - Entered						Monthly Allocat	\$100.00					\$100.00	\$100.00
2715	1174		Placement	Alternate Ad Se Dart Search	Alt. Ad Serving Fee - Entered	Dart Search, 107521_10/01_12/31_Copy	Flat - Entered						Monthly Allocat	\$300.00					\$300.00	\$300.00

Summary	By Publisher	By Category	Planned	Actual In-Flight	Actual Raw
Est (2715) Total	4	\$17,000.00	\$20,000.00		
Est Misc.					
Est Month					
Dart Search	2	\$0.00	\$0.00		
iVillage	2	\$17,000.00	\$20,000.00		

Note: Fees on Est. Total and Est Month lines include fees of all levels, whereas Fees on Publisher lines include placement level fees only.

When updates or revisions are made in Centro Basis, upon approval in Basis, all Revised Placements are exported to SBMS with a Revised Placement status.

The SBMS Revision Logic is in the API to ensure all changes follow the same financial rules and settings in SBMS. If failed updates are made, the API will generate a detailed error message which is surfaced in Centro Basis so users have a clear understanding of why a change can't be applied in SBMS.

- Net Cost cannot be less than Matched/Cleared invoices.
- Placement dates can not be changed to be after Matched/Cleared Invoice dates

Client Billing and Vendor Invoice Reconciliation (continued)

Vendor Invoicing: Placements ingested from Centro Basis follow the traditional Vendor Invoice workflow. Please see the Invoice Status Screen below:

If there's an error in the API for any reason when exporting either a new campaign or a revision, the error will surface in the Centro Basis UI. Below are a list of error messages and reasons for failure:

- The SBMS Media Type and Vendor Media Type don't match. All Vendors included in the SBMS Media Plan must be the same Media Type as the Estimate.
- The Vendor has Matched/Cleared Invoices and Costs can not be less than the Matched/Cleared Invoice Amounts.
- The Vendor has Matched/Cleared Invoices and Dates can not be after the Invoice Dates for Matched Cleared Invoice.
- The Vendor has Matched/Cleared Invoices and can not be canceled.

CONGRATULATIONS!

You have successfully linked your Basis campaign in SBMS Digital for billing and reconciliation.

If you have any additional questions, please visit support.gotostrata.com.

For more information on the Centro Basis platform, please reach out to partnerships@freewheel.com.