# knowledge well

# Britten Instructions

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## Simon Branding Media + Britten Production

A deal sheet is required when creative is ordered through Simon PM and/or GTG for media being produced by Britten. There are 2 types of deal sheets:

Manual MDS xcel form

Internal Deal Sheet from Salesforce.

See below for which type of deal sheet is required.

**General Branding Filler** - If the media will be used as general "filler", you need to complete the manual Britten MDS NonSBVSlim xcel template located below and email it to Media Deal Sheets.  Be sure to cc the Brand Management individual that you are working with on that particular order.  (NOTE: A deal sheet is not required if media is ordered on the Britten portal.)

Britten MDS - Non SBVSlim & Corporate Mktg rev 10-03-17.xls

**Event Media and/or Mandatory Display** - If the media is Event related and/or the media is required to be displayed for a specific period of time, an Inventory Only Lease Action for that particular campaign must be entered in Salesforce and an Internal Deal Sheet submitted for the media production.  See Salesforce guidelines below.

**Large Events/Campaigns** - Watch for implementation guides in the Simon Field Updates for Inventory Only Lease Actions that will be created for a particular campaign or event that you can add your media to vs. each center doing their own. Examples of such campaigns are SGK, Easter Bunny Photo and Santa Photo.  After the designated deadline, the assigned person will review the multi-mall lease action and email the Internal Deal Sheet for processing.  Remember, you do not create your own deal sheet when you add your media to the the multi-mall lease action.

Salesforce Guidelines for Event Media and/or Mandatory Display

Lease Action Edit Screen:

Reason for Submittal in Salesforce - Select *Non SBVSlim (Produce Media/Reserve Inventory)*

Invoicing Type - Select *Billed to Simon*

SBV Tenant Account  - Select *Simon Property Group Inc*

DBA/On Behalf Of - *Simon Property Group Admin*

Lease Action Name - *SPG-Mall Name-Event or Campaign Name*

SBV Deal Type - *Inventory Only*

Add SBVProduct with date range media is to be displayed, then Edit:

GL Account Code is *999999.999*

Gross Revenue = *$0*

Printing, Shipping and/or other expenses need to reflect costs for that piece of media

Description - Enter the GL Account you want the Britten expense coded to.

Review lease action, then reserve the inventory by editing the Lease Action screen and **change the milestone to 67 - Executed Lease Sent to Tenant**

Media Deal Sheet Generation - Select Media Deal Sheet Internal, click Run, then Send:

## Complimentary Media Production

Refer to Policy #5100 **Complimentary Media Protocol Procedure**-->Notes Link on guidelines for entering complimentary media using guidelines below for entering the lease action:

Lease Action Edit Screen:

Reason for Submittal in Salesforce - Select *Non SBVSlim (Produce Media/Reserve Inventory)*

Invoicing Type - Select *Billed to Simon*

SBV Tenant Account  - Selectapplicable SBV Tenant  per Policy #5100 guidelines

Lease Action Name - *Complimentary-SBVTenant Name-Mall Name-brief descrp*

SBV Deal Type - *Complimentary*

Add SBVProduct, then Edit:

GL Account Code is *888888.888*

Gross Revenue = Rate Card value if Complimentary lease action

Printing, Shipping and/or other expenses need to reflect costs for that piece of media if production is being billed to Simon

Review lease action, then reserve the inventory by editing the Lease Action screen and change the milestone to 67 - Executed Lease Sent to Tenant

**Document Generation - Internal Deal Sheet email:**

Click in the body of the email text and type the GL Account code the expense is to be coded to when invoice arrives.

**Standees -** In an effort to manage the Look, Feel & Comfort of our Standee inventory, each center is expected to create one annual Lease Action and update each month's quantity for just Simon Branding Standees that are displayed as "filler" or considered optional.  Standees counted in this lease action might be for General Branding, Renovation Marketing, or other Branding Standees, where displaying them is optional.  This includes standees ordered on the Britten portal and/or standees ordered via the manual deal sheet.  Standees that are counted in this Lease Action should not be included in any other Lease Action.  Click on this link from the 1/15/16 Weekly Update for more information-->Notes Link

The annual Lease Action for Standees will be for occupancy reporting purposes only. Therefore, **no Internal Deal Sheets to order standees will be generated from this Lease Action.**

## Add'l Artwork Change where client is paying Britten for production and inventory is already reserved in SF

_Britten MDS - Non SBVSlim & Corporate Mktg rev 10-03-17.xls

If inventory is already reserved in Salesforce <u>and</u> the original production expense was billed to Simon and client wishes to change artwork but pay Britten directly for production, complete the Britten MDS template.  Select **"Artwork Change for Existing Deal".**  Invoicing Type would be **"Billed to Client".**  Remember to include client billing information including contact name & phone number in the spaces provided.

**Weekly Update 1/15/17:**

**How to create a new Lease Action for Simon Branding Optional Standees:**

**IMPORTANT:  IF YOU CREATED THIS LEASE ACTION IN 2016 WITH A PRODUCT LINE ITEM FOR EACH MONTH OF THE YEAR, THEN YOU CAN USE THE CLONE FEATURE TO CREATE THE 2017 LEASE ACTION.  SEE BELOW ON *CLONE USING LAST YEAR'S LEASE ACTION.*** The annual Lease Action for Standees used as "filler" will be for occupancy reporting purposes only. Therefore, no Internal Deal Sheets to order standees will be generated from this Lease Action.

The steps of creating a new Lease Action for Standees is the same as any other Inventory Only Lease Action, except you would enter the following when editing the fields below.

Lease Action Edit Screen:

Media Deal Sheet Reason - *Not required since you  will not be doing the Document Generation*

Invoicing Type - *Not required since you  will not be doing the Document Generation*

SBV Tenant Account  - SelectSimon Property Group Inc

DBA/On Behalf Of - Simon Property Group Admin

Retailer - Yes

SBV Deal Type - **Inventory Only**

Use Clause - For the purposes of reporting occupancy each month for Standees displayed as "filler" or considered optional.

Lease Action Name    - Enter  Simon Branding - *your mall name-* Optional Standees '17

Add SBV Product for each month (This will be take a little longer initially, but once the lease action is created, it will take seconds to update each month.)

Start Date 1/01/17, End Date 1/31/17

Product Type = Standee

Repeat adding SBVProduct for each monthly period.  There will be 12 line items, one for each month in this lease action.

SBV Product **Mass Edit**:

Quantity = enter the number of General Branding Standees that are currently on display for each line item.

Production Quantity = 0 for each line item.

GL Account Code = 999999.999 for each line item.

Print & Ship to Property = No for each line item.

Gross Revenue = $0 for each line item.

Printing, Shipping and/or other expenses = $0 for each line item.

**IMPORTANT! Be sure to Fully Execute the Lease Action (Milestone 67 - Executed Lease to Tenant) so Standee quantities are counted in the Occupancy Report.**

Your Standee lease action is now set up. All you have to do is maintain the following month's quantity on the 1st Monday of every month. Remember the Quantity for all line items is what was on display when you initially created the lease action. If that number has changed the 1st Monday of the next month, you will need to edit that month's Quantity.

For example, the Quantity for standees was 6 for all 12 line items when the lease action was created in January. On Monday, 2/06/17, the number of filler or optional Simon Branding Standees displayed is only 4. ONLY the Quantity field of the line item for February will need to be edited: RECOMMENDATION: Set a reminder on your calendar the 1st Monday of every month to update that month's Standee product in your lease action.

**Clone Using Last Year's Lease Action**

***What happens when you use the Clone feature:***

*Creates a new lease action with the same Lease Action Name & SBVProducts - so you MUST UPDATE THE NAME TO*Simon Branding - *your mall name-* Optional Standees **'17**

*Use Clause: Remember to enter* For the purposes of reporting occupancy each month for Standees displayed as "filler" or considered optional.

*Start Date for each Product Line Item will start the day after the End Date of the Product Line Item of the lease action that was cloned so you must change start date on each of the 12 line items to reflect 1st day of each month of the year.*

*End Date for each Product Line Item will be 12/31 of the same year of the new Start Date so you must change the end date on each of the 12 line items to be the last day for that month.*

*Quantity fields will be the same from prior lease action so the first Monday of each month, count the number of Simon Branded "filler" standees on the floor and edit the Quantity field for that month. IMPORTANT:The Simon Branded standees counted in this lease action should NOT include standees included in other Simon Branded lease actions created for on mall events or other special campaigns where posting media for specified period of time is mandatory.*

**IMPORTANT!!**

It is that time of year with the increasing number of deal sheets being generated that more are being returned for corrections. If the lease action has begun the approval process, the lease action is locked and will **not** allow edits. In order to make corrections, the User will need to recall the lease, make corrections and resubmit the Internal Deal Sheet. This not only holds up the ordering process, but is frustrating for the Dealmakers as well. For this reason, we recommend that you email the Internal Deal Sheet, wait for Media Deal Sheets to process

the deal sheet before starting the approval process.  Note however, once a lease has migrated to JDE (day after milestone hits 67), the lease is unlocked and changes can then be made to the product line items.

**Please review the following reminders.  These are where most errors occur:**

**Standees, Pole Banners, Table Clings, Posters, etc.**

Quantity = the display quantity, Production Quantity = # pieces being ordered.  In some cases if you are ordering more pieces as overage, the Production Quantity will be more than the Quantity.  For example, you want to order 300 table tents, but you are only putting them on 50 tables.  The Quantity will be 50 and the Production Quantity will be 300.

Print Cost for Standees, Pole Banners and Posters will populate for a quantity of 1.  If you are ordering more than (1) make sure you edit the quantity fields, print & ships cost accordingly.  The Britten Pricing Matrix is posted in Salesforce and on the Bulletin Board-->Notes Link.

**January line item or other line items where media is NOT being ordered**

Change the Print & Ship to Property to NO and be sure to zero out any expenses

For Standees, Posters, etc.  The Quantity should equal the display quantity, but the Production Quantity should be changed to 0

**Production Company, Media Installer**

Only change from Britten to Local or Other if the media is not being produced or installed by Britten.  For January line items or line items that are extension of previously produced/installed media by Britten, only change the Print & Ship To Property to NO.  In other words, only change to Local or Other if you are using a local vendor for printing or installation.

**Multiple Creative Change-Outs**

Each line needs to represent the period for that particular creative.  Do not combine multiple change-outs on one line item.  If you do not know exact dates, use your best judgement.

**Britten Installation/Removal Costs**

Costs are discounted after the first install for Skybanners, Escalator Wraps and Elevator Door Wraps.  Refer to the Britten Pricing Matrix for cost for each additional location where install/removals will occur the same day.  For example,  Microsoft has standard Escalator Wraps at X1, X2, X3 at Menlo Park from 9/1/15-12/31/15 .  Install cost of $500 will auto-populate for each product. The installation/removal cost for X2 & X3 should be changed to $300 because per the Britten Pricing Matrix, it is $500 for the 1st install, then $300 for each thereafter.  (See Description Field for Roosevelt Field BriteWall install costs)

**Lease Action Name**

Please use the following format when naming your lease action:  SBVTenant Name - Mall Name - brief description.  For example, Tourneau - Florida Mall - Holiday '15 or if multiple centers, Tourneau - Multi Mall - Holiday '15