# Using the Set Up Assistant

To create a code, you must first have a group, prefix and account set up and associated to each other. This document will provide instructions on using the set up assistant to create a new group, prefix and account.

If you are a new user that has not yet created a log in, you will first need to create a user profile here: https://app.ad-id.org/user/register.

The set up assistant can be used to do the complete set up for a new advertiser, such as when an agency needs to set up a new client on Ad-ID. If you need to complete a set up involving an existing group, prefix or account, the set up assistant cannot be used.

1. Click on the Create menu in the top navigation and choose Set Up Assistant.
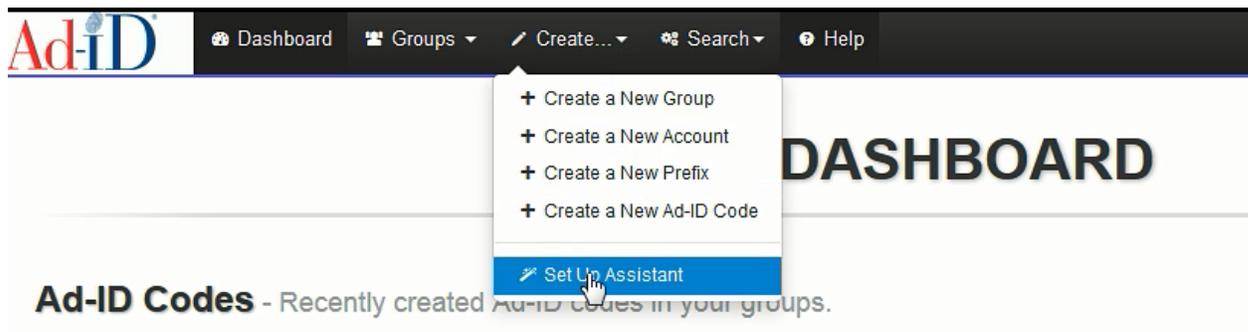
2. If the company for which the account is being created is a 501(c)(3) non-profit, select Yes and you will be directed to our website with more information on that process. If the company is not a 501(c)(3) non-profit, leave the default selection of No and Continue.

3.   Enter the name of the group.
     a. Groups are used as a security mechanism and act as a container for
         prefixes, accounts, codes and users.
     b. The group name can be any label and usually includes the advertiser name,
         agency name or combination of both so that users can easily identify what
         the group is for.

> Enter the name of Your New Group.

A group is a container for Users, Prefixes and Ad-ID Codes. The group name is a description used to easily identify the group and usually includes the advertiser name, agency name or combination of the two.

Group *   Valmor

                   Enter New Group Name

4.   You may enter emails to allow others to access this group once the set up is
     completed. You are not required to complete this section and may add other users
     later. Click on Continue.

> Invite others to this group.

Permission *   - Select -   ▼   ❓
                    - Select -
                    Administrator
Emails   User
                    Edit Only
cs@ad-id.org   Read Only

Enter emails to add, each separated by a comma.

Continue

Note: At any point during the set up assistant, you may select the Save button to save the
information you have already entered in the assistant. This will allow you to retrieve the
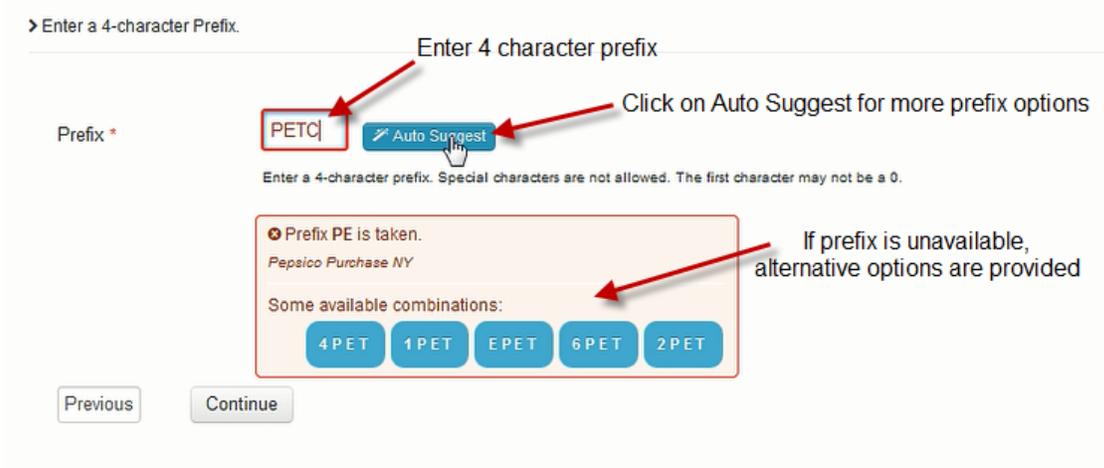information later if you have to leave the assistant.

To retrieve the information later, go to the Create menu and select Set Up Assistant. Click
on Continue on the 501(c)(3) page (per step 2 above), then select the Retrieve button at
the bottom right. This will bring you to the last page you left off at and the information you
had previously entered will be used.

Only one set up can be saved at a time. It will only save the most recent set up that you
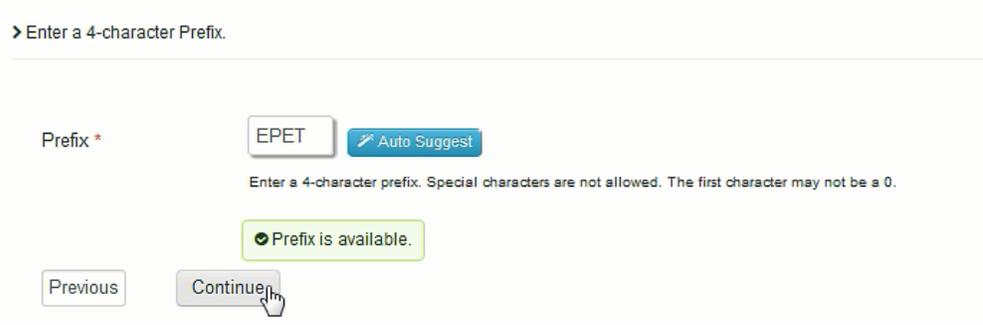requested to save.

Enter emails to add, each separated by a comma.
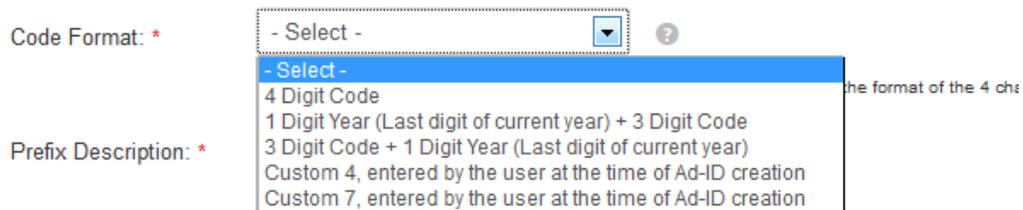
Save ❓   Retrieve ❓

5. On the next screen, enter a 4-character prefix which can be alpha-numeric, however cannot start with zero. If the prefix is taken, the system will provide alternative prefixes to choose from, which you can click on to select. You can also use the Auto Suggest button to find an available prefix.
    a. A prefix is a 4-character identifier licensed to a company and used at the beginning of each Ad-ID code.

> Enter a 4-character Prefix.

Enter 4 character prefix

Click on Auto Suggest for more prefix options

Prefix *   PETC   ✎ Auto Suggest

Enter a 4-character prefix. Special characters are not allowed. The first character may not be a 0.

⊗ Prefix PE is taken.   If prefix is unavailable,
Pepsico Purchase NY   alternative options are provided

Some available combinations:

4 PET   1 PET   E PET   6 PET   2 PET

Previous   Continue

6. Once a prefix is selected, click on Continue.

> Enter a 4-character Prefix.

Prefix *   EPET   ✎ Auto Suggest

Enter a 4-character prefix. Special characters are not allowed. The first character may not be a 0.

⊘ Prefix is available.

Previous   Continue

7. Choose the code format which determines how the characters after the prefix will be generated.
    a. 4 digit code: starts at 0001 and counts up sequentially. Most common option.
    b. 1 digit year + 3 digit code: includes the last digit of the current year in the first character after the prefix.
    c. 3 digit code + 1 digit year: includes the last digit of the current year in the fourth character after the prefix.
    d. Custom 4: requires the user to type in the 4 characters after the prefix
    e. Custom 7: requires the user to type in all 7 characters after the prefix

Code Format: *   - Select -   ▼   ❓

                    - Select -
                    4 Digit Code   the format of the 4 cha
                    1 Digit Year (Last digit of current year) + 3 Digit Code
Prefix Description: *   3 Digit Code + 1 Digit Year (Last digit of current year)
                    Custom 4, entered by the user at the time of Ad-ID creation
                    Custom 7, entered by the user at the time of Ad-ID creation

8. Enter the prefix description which describes what the prefix is for and is typically the name of the advertiser or a specific brand or product. The prefix note is for additional descriptive information and is only required when custom 4 or 7 code format is selected. Click on Continue.

Code Format * | 4 Digit Code ▼
Select the preferred format of codes created with th

Prefix Description: * | Valmor Petcare
Describes what the prefix is for and is typically the

Prefix Note ❓
[ ]
Required for custom formats. Describe how custom instructions in this note. Include the name and ema

Previous   Continue ⬅

9. Determine if the prefix will be locked or unlocked.
   a. An unlocked prefix is licensed to an agent, such as an advertising agency, and is not associated to a Parent company. Unlocked prefixes can be used to create codes for multiple advertisers who do not have a locked prefix. Check the box to create an unlocked prefix.

❯ Please assign a Parent company to this Prefix. ❓

To make subsequent code generation quicker and easier, you can also enter the Advertiser, Bra company is not associated to the prefix, the prefix can be used to create codes for small advertis

☑ Create an unlocked prefix. ❓

Previous   Continue

   b. Locked prefixes are the most common and are associated to a Parent company and the prefix can be used only for that Parent company. Use the Search or Look-up to find the appropriate Parent.

☐ Create an unlocked prefix. ❓

↺ Reset

Search option

Search for: | Parent Company ▼ | Look-up option

Search*   [ ]   🔍 Look-up

Search for a company. Autocomplete field.

Previous   Continue

10. For locked prefixes, you may choose an Advertiser, Brand and Product to associate to the prefix, but it is not required. If you associate the prefix down to a certain level, the fields will auto-populate during code creation. Click on Continue to move to the next step.

11. Enter the account name.
   a. Accounts are used to purchase credits to create codes.
   b. The account name can be any label and is usually the advertiser name, agency name or combination of both to describe what the account is for.

12. Choose if you want to use or edit the information from your user profile for the billing info or if you'd like to enter all new information. Then click Continue.

13. If you chose to use your profile, the billing information will be populated and you can edit as necessary. Click on Continue.

    a. The invoice memo allows you to enter data that is required to be on all invoices. For example, if a vendor # is required on each invoice.

    b. The invoice note allows you to enter additional descriptive information to be displayed on the invoice for the current purchase. For example, "Purchase covers 2 codes."

    c. At least one email must be provided to receive invoices and statements. Multiple email addresses may be entered, separated by a comma.

Contact Name *	ADDIE DIGITAL TESTING AGENCY	**Edit info if needed**	Country *	United States
Company Name *	ADDIE DIGITAL TESTING AGENCY		Direct Phone *	704-501-4410
Address *	11020 David Taylor Drive		Invoice Memo	
Address 2	Suite 305		Invoice Note	
City *	Charlotte			
State *	NC|North Carolina			
Zip Code *	28262		Email address for invoices and statements *	
			addie@ad-id.org	

Invoices will be emailed to the address(es) entered here. Multiple email addresses may be entered, separated by a comma.

[Previous] [Continue]

14. You can enter the number of codes you would like to purchase, then click Calculate. If you do not want to purchase codes now, the number of codes field can be left as zero. All amounts are US dollars.

Prefix Fee	$0
Enter # of codes needed	50 **Enter # of codes needed**
[Calculate]	**Click Calculate**
Code Cost	$1,500 **Total Cost**
Total Deposit	$1,500

Amount in US Dollars
Costs shown are an estimate calculated

15. If purchasing codes, choose payment method of purchase order or credit card. If you choose purchase order an invoice is sent via email. Then click Continue.

Payment Method

    ◉ Purchase Order

    ◯ Credit Card

[Previous] [Continue]

16. The amount is confirmed. Enter the purchase order number or credit card information, depending on which option was chosen. Click on Continue.

Amount	**$1,500**
P.O. # *	1234567
Job/Project #	45768

Previous   Continue

17. A final confirmation of the group, prefix and account set up, including any associated costs, is provided. If anything is incorrect, click on the Previous button and make the necessary changes. Otherwise, click on Confirm to complete the set up.

› Please Confirm your Payment to the "Valmor Account" Account.

Amount	$1,500	❶ If something needs to be changed, click the "previous" button below to update the information.
Method	Purchase Order	
Purchase Order	1234567	
Job Number	45768	

Address
Ad-ID, LLC
Attn: ADDIE DIGITAL TESTING
11020 David Taylor Drive
Suite 305
Charlotte, NC 28262
United States

Contact
Phone: 704-501-4410 EXT34444

Previous   Confirm

18. Next you are brought to the code creation screen where you can create the Ad-ID code by completing the required fields.

> Create a new Ad-ID.

Group *	Prefix *	Account *
Valmor	EPET - Valmor Petcare	Valmor (Balance: 1,500)
		⊘ 50 codes available[1].

Create Multiple Codes By Entering # of Codes

Create Multiple Codes By Varying Fields

Slate	**Slate**

Please visit www.ad-id.org to access additional help instructions or contact Ad-ID customer relations at 704-501-4410 or cs@ad-id.org.