

Mediaocean Client Services
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1. Overview

The Lock Estimate program enables users to simultaneously lock or unlock multiple spot estimates for a specific location/client/date range combination.

2. Lock /Unlock an estimate

Estimates can only be locked using this program if they are not already locked and if they are not in use in another program in OX. (Please see **Troubleshooting** section of this document for more details.)

1. On the **Main** screen, complete **Media Type**, **Location**, and **Client** fields with your values.
2. Enter or select start and end dates for the lock/unlock request in the **Date Range** fields. Please note, any estimates that fall partially or entirely within the selected date range are included in the request.
3. To lock estimates, select **Lock Estimates** in the **Action** field. To unlock estimates, select **Unlock Estimates**.
4. In the **Test Run** field enter or select **Yes** to run the request in test mode or **No** to execute the request.
5. Click the **Run** button. A confirmation window appears.
6. Click **Yes**.

Spectra OX searches for all estimates that match the criteria entered using the steps above. The **Lock Estimate Report** is generated each time the process is requested (both test and live runs).

Scenarios:

- **Action = Lock, Test Run? = Yes:** The estimates that can be locked are included in the Lock Estimate Report.
- **Action = Lock, Test Run? = No:** The **Lock Estimate for Billing** setting in Estimate Maintenance is selected for all estimates that meet the criteria. All of the locked estimates are included in the Lock Estimate Report.
- **Action = Unlock, Test Run? = Yes:** The estimates that can be unlocked are included in the Lock Estimate Report.
- **Action = Unlock, Test Run? = No:** The **Lock Estimate for Billing** setting in Estimate Maintenance is cleared for all estimates that meet the criteria. All of the unlocked estimates are included in the Lock Estimate Report.

Troubleshooting:

If the process is not successful, a message will appear explaining why the request could not be completed. Possible reasons why the request could not be completed include:

- One or more of the affected estimates is already locked.
- One or more of the affected estimates is open for edit in Spot Estimate Maintenance.
- There is an open goal entry session for one or more of the affected estimates in Spot Goal Maintenance.
- There is an open buy session for one or more of the affected estimates in Spot Buy Maintenance.
- There is an open matching session for one or more the affected estimates in Spot EZ Match.

The reason the request could not be completed is also included in the **Process Successful?** column of the Lock Estimate Report.

3. Lock Estimate Report

The **Lock Estimate Report** is generated each time the process is requested (both test and live runs). The generated report is sent directly to the requester's Print Queue. It provides a listing of the estimates affected by the request.

Successful Lock Estimate report

LOCK ESTIMATE BILLING REPORT										Page 1
										Thu Apr 27, 2017
										5:17 PM - GG1
										SP:LOCKEST1
										RUN TYPE:LIVE
Media	Loc	Client	Est#	Est Full Name	Start Date	End Date	Est Status	Process Successful?		User
T	650	GPN	1702 Q2 2017		2017/03/27	2017/06/25	LOCKED	Sorry -- this estimate is LOCKED for Maintenance		GG1
T	650	GPN	1703 Q2 2017		2017/03/27	2017/06/25	LOCKED	Estimate updated successfully		GG1

The report includes **Media**, **Location**, **Client**, **Estimate number**, **Estimate Full Name**, and **Start** and **End Date** columns. It also contains an **Estimate Status** column that shows whether or not the estimate is locked and a **Process Successful?** column that shows if the request was successful and if not, why not. If the process is successful, the user ID for the lock/unlock request displays in the **User** column. If not, the user ID for the user that is in the estimate, goal, buy, etc. displays.