Creating/Attaching an Agency to an advertiser:

Setting up an Agency:

1. Create Agency Company record:
	1. Fill in Company Name, Address, Phone number and Website





* 1. Check the “Agency” Box



* 1. Check the “Naviga Leadworks Sync” Box

 

* 1. Click Save

1. Create the contacts at the agency (in this company record)
	1. Enter First Name, Last Name and Email address.



* 1. Click Save
	2. Edit their Relationship.



* 1. Select their Role in our advertiser’s Account (Advertiser Decision Maker, Digital and/or Print Material Contact or Billing Contact.



* 1. Save
	2. If the contact(s) do not sync with Naviga after saving, you can use the force sync box if you need the contact right away. Otherwise, they should sync overnight.

*\*\*\* Note: The agency will not have a company listed under “Agency Representing This Account”. If you see something there, you have something connected incorrectly.*

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Attaching the Agency to the client:

1. Create the company or open the existing company
2. Scroll down to “Agency and Relationships”
3. Click the edit pencil next to “Agency Representing This Account”



1. Start typing the name of the Agency and select the Agency from the list of choices.



1. Save
2. You will know you connected them correctly when you see the name of the Agency under “Agency Representing this Account” at the top of the company screen.

