

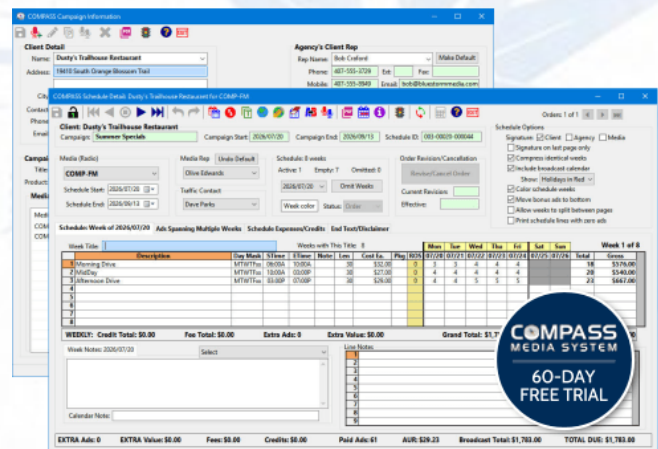
Quick Start Guide

Getting Started with Your 60-Day Trial

Welcome to COMPASS Media System, and thank you for downloading the full 60-day trial.

This guide will walk you through the first steps needed to begin using COMPASS. You do not need to learn every feature right away. Start with the basics, explore at your own pace, and use the built-in help whenever you need more detail.

By the end of this guide, you will know how to enter your agency information, create client records, add media information, create your first campaign, begin building a schedule, and find help when you need it.



WHAT YOU'LL DO FIRST

- Set up your agency information.
- Create one or more client records.
- Add the stations, outlets, or vendors used in your campaign.
- Create your first campaign.
- Begin building your first schedule.
- Use COMPASS help and support resources.



Tip: COMPASS includes many powerful features, but you only need a few basic steps to begin exploring the program.



Need help? Press **F1** for context-sensitive help inside COMPASS.

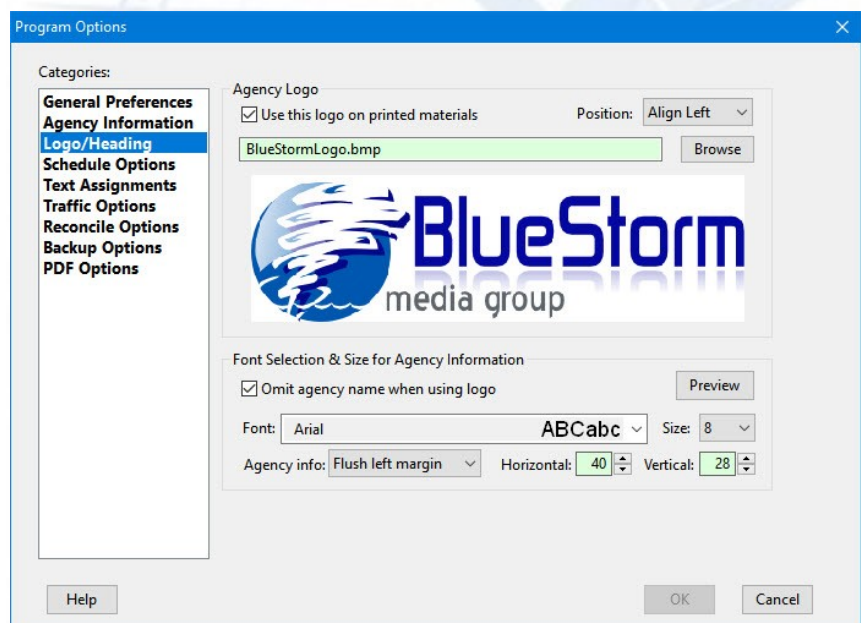


1. Agency Information

Start by setting up your organization

On first use, COMPASS will prompt you to enter information about your agency or media buying service in Program Options. This includes your organization name, address, contact information, logo, and related details.

Program Options also allows you to fine-tune how COMPASS works for your organization. Many settings have already been configured with sensible defaults, so you can begin working right away and adjust individual options later as you become more familiar with the program.



Tip: You do not need to change every setting now. Most options are already set for you.



Next Up: Create Client Records

Add one or more clients so COMPASS can begin organizing campaigns around the accounts you manage.



Need help? Press **F1** for context-sensitive help inside COMPASS.



2. Create Client Records

Add the clients you manage

Enter details about one or more clients in the COMPASS database. Clients can be added at any time, so you may choose to enter several clients now or simply create each client when you are ready to begin campaign work for them.

Client information includes the organization name, primary contact person, address, and contact details. COMPASS can handle an unlimited number of clients, allowing you to build your client database gradually as your use of the program expands.

Add Client

Client Detail

Name:

Address:

City: State: Zip:

Contact: Mobile:

Phone: Ext: Fax:

Email:



Tip: Start with one or two active clients.
You can always add more later.



Next Up: Add Media Information

Set up the stations, outlets, or vendors you will use when creating campaigns.

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Need help? Press **F1** for context-sensitive help inside COMPASS.



3. Add Media Information

Set up stations, outlets, and vendors

In COMPASS, **media** refers to the stations, outlets, or vendors assigned to a campaign.

When a campaign is created for a client, media can be associated with that campaign. Media information may include the outlet name, media type, contact details, sales representatives, and related information. Not every detail needs to be entered immediately, and media records can be edited at any time.

Each media record is unique and can be reused across future campaigns whenever needed. There is no limit to the number of media records you may keep on file.

Rep Name	Def	Hide	Phone	Ext	Mobile	Fax	Email
1 George Hatheway	☐	☐					
2 Jerry Woods	☐	☐					
3 Olive Edwards	☒	☐	407-555-1819		407-555-3897		olive@comp-fm.com
4	☐	☐					
5	☐	☐					
6	☐	☐					
7	☐	☐					
8	☐	☐					
9	☐	☐					
10	☐	☐					

Name	Def	Hide	Phone	Ext	Mobile	Fax	Email
1 Dave Parks	☒	☐	407-883-6821		407-231-7061		dave.traffic@comp-fm.com
2	☐	☐					
3	☐	☐					
4	☐	☐					
5	☐	☐					



Tip: If you are just getting started, enter only the media needed for your first campaign. You can expand your media list later.



Next Up: Create Your First Campaign

Once agency, client, and media information are in place, you are ready to begin campaign setup.



Need help? Press **F1** for context-sensitive help inside COMPASS.



4. Create Your First Campaign

Begin organizing the buy.

Once the first setup steps are complete, you are ready to create your first campaign.

Select a client and click the **New Campaign** button on the COMPASS main window tool bar to begin. You may also click **New Campaign** without first selecting a client. When the Campaign Information window opens, choose an existing client from the drop-down list or create a new client on the spot.

Media	Type	Rep	Status	Ver	Start	End	Ads	Cost	Grand
COMP-FM (Orlando, FL)	Radio	Olive Edwards	Order	Pip-1	2025/01/20	2025/09/13	61	\$1,783.00	\$1,783.00
COMP-TV 6 (Orlando, FL)	Television	Donna Wise	Proposal	Pip-1	2025/01/20	2025/09/13	0	\$0.00	\$0.00

After the campaign details have been saved, including the campaign name and dates, media can be assigned to the campaign and proposals or orders can be created for each.



Tip: If you are new to COMPASS, consider creating a simple test campaign before entering a live buy. This gives you a safe way to explore the workflow.



Next Up: Build Your First Schedule

Once the campaign has been created, you can begin entering schedule details for the media assigned to it.



Need help? Press **F1** for context-sensitive help inside COMPASS.



5. Build Your First Schedule

Start entering schedule details

After a campaign has been created and media have been assigned, you can begin building the schedule.

Start with one media outlet and enter a simple schedule using the campaign dates, days, times, rates, and other buy details. As you become more familiar with the Schedule Detail window, you can explore additional features such as revisions, traffic instructions, and reconciliation.

COMPASS Schedule Detail: Dusty's Trailhouse Restaurant for COMP-FM

Client: Dusty's Trailhouse Restaurant
Campaign: Summer Specials Campaign Start: 2026/07/20 Campaign End: 2026/09/13

Description	Len	Mon 07/20	Tue 07/21	Wed 07/22	Thu 07/23	Fri 07/24	Sat 07/25	Sun 07/26	Total	Gross
1 Morning Drive	30	3	3	4	4	4			18	\$576.00
2 MidDay	30	4	4	4	4	4			20	\$540.00
3 Afternoon Drive	30	4	4	5	5	5			23	\$667.00
4										
5										
6										
7										
8										

Week 1 of 8

Image is a truncated view due to space limitations. The actual Schedule Detail window is much more detailed.

This is where COMPASS begins to show its real value: helping you organize the details of the buy, maintain consistency, and reduce the chance of missed information or costly errors.



Tip: Begin with a straightforward schedule first. Once you are comfortable, explore revisions, traffic instructions, and post-schedule reconciliation.



Next Up: Help and Learning Resources

COMPASS includes built-in help and additional learning tools whenever you need them.



Need help? Press **F1** for context-sensitive help inside COMPASS.



6. Help and Learning Resources

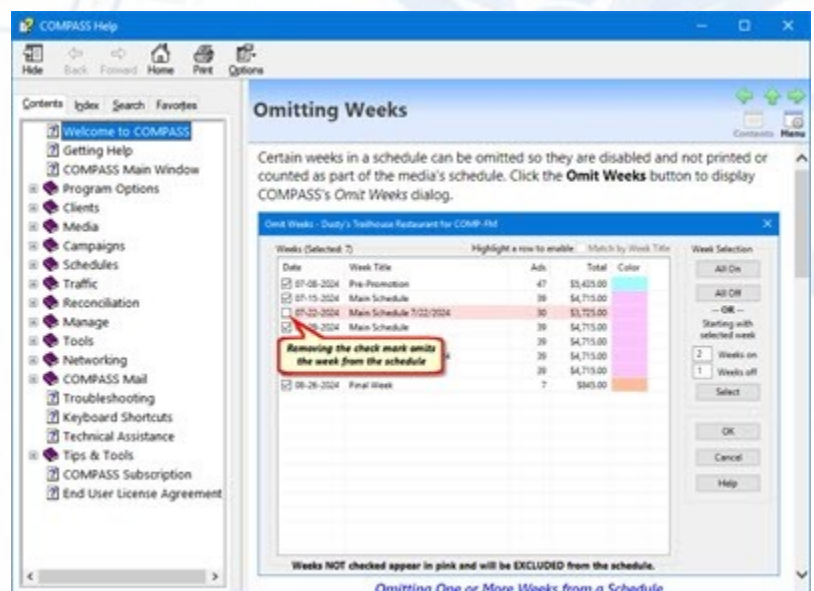
Find answers while you work

COMPASS includes extensive built-in, context-sensitive help covering virtually every major window and feature in the program.

Simply place your mouse cursor over whatever you have a question about and press the **F1** function key on your keyboard. Help for that specific object or feature will be displayed instantly.

The complete COMPASS Help File is also available on the COMPASS web site. It provides detailed information about the program's windows, features, and workflows for users who want to explore the system more deeply.

The COMPASS web site may also include tutorials and an AI assistant designed to answer many common questions using the program help file.



Tip: When in doubt, try **F1** first. It is often the fastest way to find the exact answer you need.

ALSO AVAILABLE
Online Help File
Tutorials
COMPASS AI Assistant



Next Up: Support During Your Trial

If you need additional help, support is available throughout your 60-day evaluation.



Need help? Press **F1** for context-sensitive help inside COMPASS.



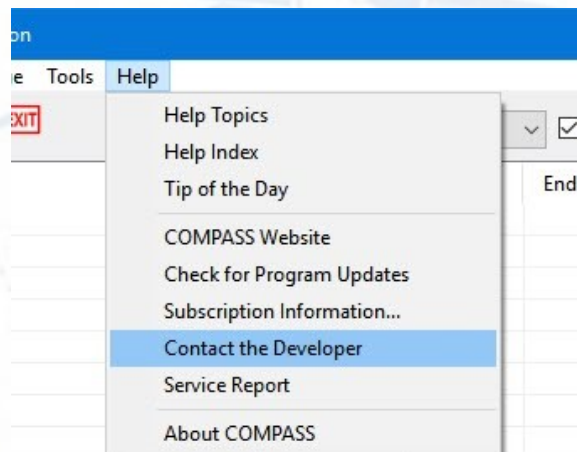
7. Support During Your Trial

You are not on your own

If you have a question or issue that is not answered in the help file, support is available during your 60-day trial.

From the COMPASS main menu, select **Help** > **Contact the Developer** to send an email directly to support services. Trial support is provided by email, and we typically respond within one business day — often sooner.

If you encounter a technical problem, you can submit a Service Report for assistance. The COMPASS web site provides helpful resources including the complete online Help File, tutorials, and the COMPASS AI assistant.



COMPASS was developed inside a working ad agency by programmers with decades of experience in broadcasting and ad agency operations. We hope you will find COMPASS to be a valuable tool for your organization.



You're Ready to Begin

You now have the basic steps needed to start exploring COMPASS:

- Set up your agency information
- Create client records
- Add media records
- Create a campaign
- Build a schedule
- Use help and support when needed

Thank you for trying COMPASS Media System. We look forward to helping you get the most from your 60-day trial.