



Administrative Guidelines for Client Messenger

May 2024

PILOT: Administrative Guidelines for Client Messenger

 Messenger is now available for your ARO submissions!

1. What is messenger?

Messenger is an additional service exclusive to ARO submissions that allows you to communicate directly with your Reviewer within your eFiles APS documents. It is intended to be used selectively to help move key elements of your APS forward. It enables agencies and manufacturers to receive binding PAAB review decisions on pivotal segments of the submission before resubmitting the entire copydeck/layout.

2. Why use messenger?

Messenger can help reduce the number of resubmissions to approval by giving you the opportunity to obtain review decisions on pivotal segments of your piece in between rounds of resubmission.

This feature may reduce time to approval for the following reasons:

- The ability to obtain review decisions on pivotal segments of the review before resubmitting the revised APS should reduce the number of resubmissions of the complete copydeck/layout required for approval.
- Time saved from the ability to obtain review decisions on pivotal parts of the copydeck/layout in between rounds of review. This means that while you complete the remaining revisions from your review letter and have them vetted by the manufacturer, you can gain clarity on important elements of your piece that are necessary to move the piece forward.
- APS may contain pivotal segments that set the direction/context for the piece (e.g. creative concept, overarching headline, layout format), and thus have an impact on the remainder of the APS. Having the ability to decouple those pivotal segments, and receive timely review decisions relating to them, allows the marketer to determine how to proceed with the remainder of the copydeck/layout prior to resubmitting it for review. This can reduce the number of rounds of review when context setting copy impacts other sections in the piece.

Reviewers will continue to be available for live ticket phone calls to provide clarification on revision requests. However, binding review decisions are **not** provided over the phone. Only written correspondences, including the messenger functionality, provide the opportunity for Reviewers to perform the level of due diligence that a review decision necessitates.

3. Eligibility and inclusions

Upon launch, the following guidelines apply for use of the messenger function:

1. Messenger requests will only be approved for eligible ARO submissions at this time.
2. A supplemental fee will apply for the use of the messenger service. Please see our [Fee Schedule](#) for the current fees.
3. The messenger fee will provide you with a total of 5 messages directed to your Reviewer, for use over the entirety of the submission it was requested for. Please note that messages between your team or between the agency and the client are not counted toward this total. Please see [Appendix A](#) for instructions on how to communicate with your reviewer, and [Appendix B](#) for instructions on how to use Messenger to communicate with your own team and clients.
4. Additional messages may be requested for an additional messenger fee and will provide the user with an additional 5 messages per fee. Please contact review@paab.ca if you wish to purchase an additional 5 messages.
5. Unused messages are non-transferable, non-refundable and expire upon closure of the eFile.
6. Messages sent to a Reviewer will be responded to within 1 business day of being sent. Please see the section on “Using Messenger” for further information on turnaround times.

As indicated in the [fee schedule](#), changes to limits and/or fees associated with the number of messages per round of review may occur, if necessary, based on utilization patterns observed during the pilot. This is an unprecedented service offering for PAAB and our clients, so we will make data-driven decisions based on real-world experience.

4. When is Messenger use appropriate vs. other methods of communicating with a reviewer?

Messenger should be primarily used for clarification, similar to the use of a ticket call. However, the benefit of using Messenger is that you will receive a binding review decision that you can apply moving forward. While Reviewers make every effort to consider all factors when responding, please note that as a single segment is being discussed in Messenger, ultimate acceptance depends on subsequent contextual review within the entirety of the APS.

While using messenger, if the topic shifts from a clarification, the Reviewer may request a formal response or suggest a phone call. For example:

- The clarification spawned a new idea or direction for the piece that deviates significantly from the previous version and requires significant re-review.

- The submitter does not agree with the clarification or comment provided and would like to formally request a reconsideration that includes rationale and backfiles for assessment.

5. Using Messenger

A Reviewer's response to a message will be sent within 1 business day of receipt of the client's message (excluding weekends, holidays and other PAAB office closures):

The day a message is received is day zero (0) if it is submitted prior to the end of the [PAAB Business Day](#). If it is submitted after business hours, the following day will be considered day 0. A response to this message can be expected by 11:59 on the following business day, which is considered day 1.

If more than one message is sent prior to the response of the first message, the due date for all messages will be calculated from the last message received and applies to all messages. Please see the examples below for more information:

Example 1: Message 1 is sent at 3:30pm on October 13 (Day 0). Prior to response, message 2 is sent out at 9:30am on October 14 (Day 1 for message 1, Day 0 for message 2). All messages now take on a new due date and may not receive a response until the most recent message's due date (i.e. October 15th is now the due date for both messages).

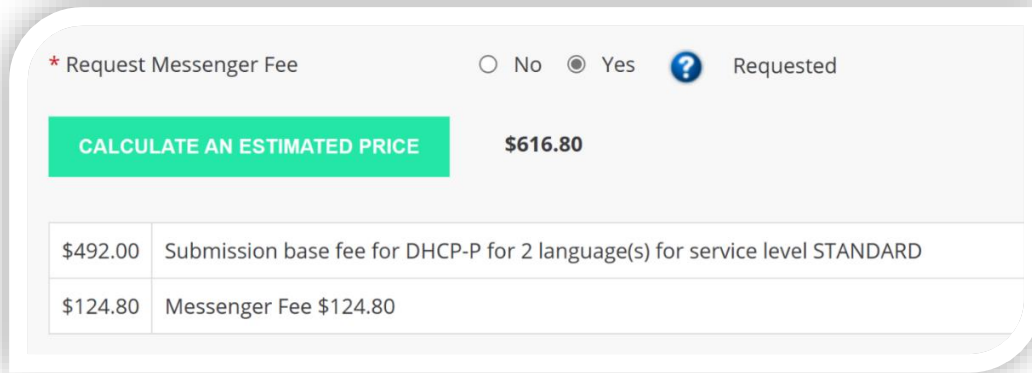
Example 2: Message 1 is sent at 9:30am on October 13 (Day 0). At 2pm on that same day, message 2 is sent. Since both messages were sent on Day 0, they would both be due the next business day (Day 1).

NOTE: In some cases, a clarification question may require internal/external consultation and require more time to respond. In these cases, the Reviewer will send a message like "This issue requires internal consultation. Please expect a response in X days" to ensure you are aware and to provide an approximate timeline. We will make every effort to return your message at the earliest opportunity.

APPENDIX A – Messenger Instructions for Use

Requesting Messenger:

Upon submission of a file, you will see the following prompt. If you would like to request use of Messenger on your file, select Yes.



* Request Messenger Fee No Yes ? Requested

CALCULATE AN ESTIMATED PRICE **\$616.80**

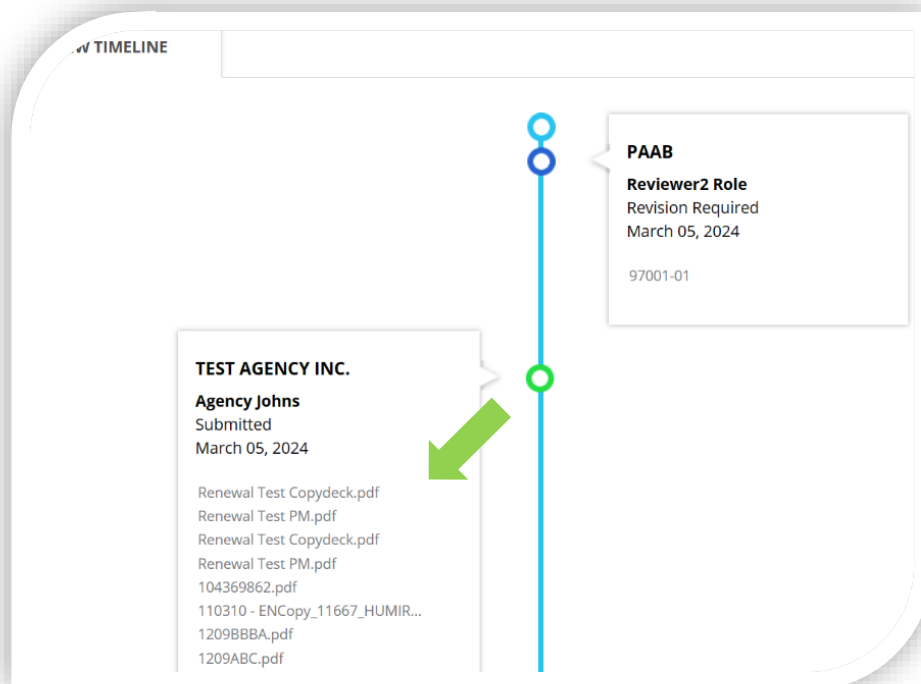
\$492.00	Submission base fee for DHCP-P for 2 language(s) for service level STANDARD
\$124.80	Messenger Fee \$124.80

When our file coordinators receive your file, they will assess your request and if your eFile is eligible, it will be approved for Messenger use.

Please note that at this time, only ARO submissions are eligible for use of Messenger while we pilot this new service.

Sending a Message:

1. Open the document you would like to make an annotation on from your 'View Timeline' Tab.



VIEW TIMELINE

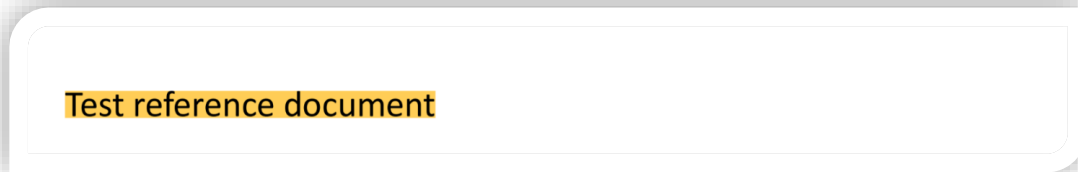
TEST AGENCY INC.
Agency Johns
 Submitted
 March 05, 2024

- Renewal Test Copydeck.pdf
- Renewal Test PM.pdf
- Renewal Test Copydeck.pdf
- Renewal Test PM.pdf
- 104369862.pdf
- 110310 - ENCopy_11667_HUMIR...
- 1209BBBA.pdf
- 1209ABC.pdf

PAAB
Reviewer2 Role
 Revision Required
 March 05, 2024

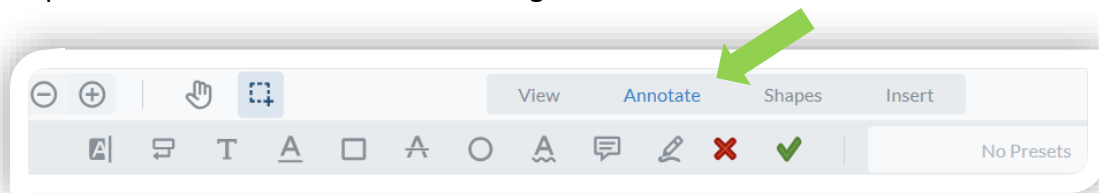
97001-01

2. Locate the copy or visual you are referencing. We suggest highlighting or boxing the relevant section to quickly draw attention to the portion of the APS that is being discussed.

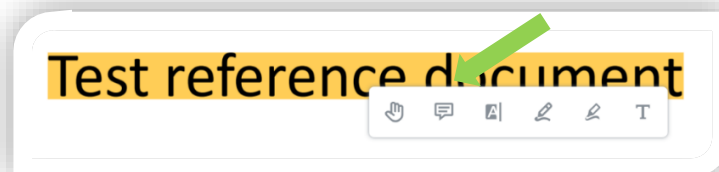


3. Add a comment box. This can be done by selecting the comment box from the annotations tool bar, or by right clicking the annotation you created (e.g. highlight, box, etc.) and choosing the comment box from the mini toolbar.

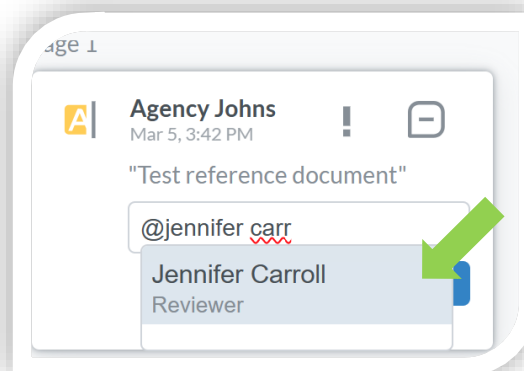
Option 1 – Annotation bar and choosing the comment box:



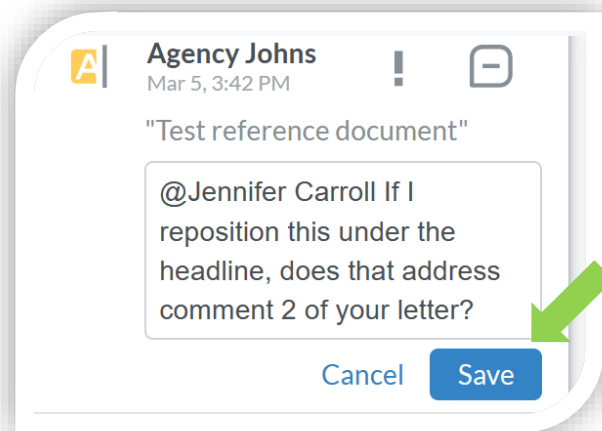
Option 2 – Right clicking an existing annotation and choosing the comment box:



4. Start every message by @mentioning your **primary Reviewer** for the file. This is the Reviewer who signed your first response letter. The name will auto populate in a list and should be associated with the role of 'Reviewer'. Select the username from the list.



5. Type your question or point of clarification and click 'Save'.



Once you save your annotation/comment, your Reviewer will be notified.

6. If you see "[AWAY]" upon @mentioning your primary Reviewer in a comment, this means that Reviewer is currently out of the office. **Please continue with your message to the primary Reviewer regardless of this status.** eFiles will automatically redirect your message to the backup reviewer. You do not need to take any additional action.

Messenger Best Practices:

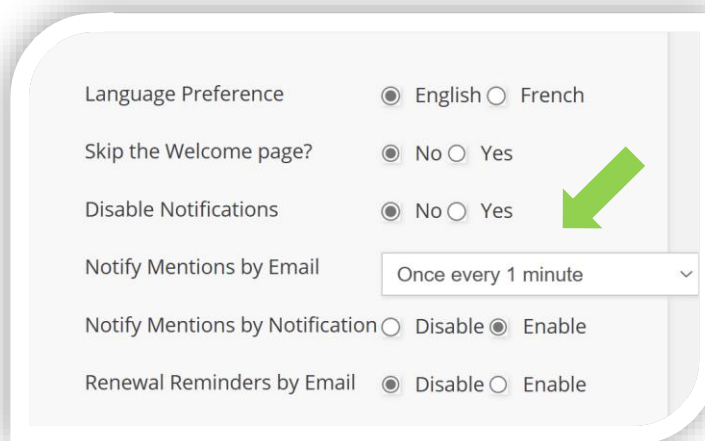
1. Always @mention your Reviewer in your message. If you do not @mention them, they will not receive a notification that you have sent them a message and your response may be delayed.
2. Specifically, always @ mention the primary Reviewer for your eFile. Your primary Reviewer is the Reviewer who sent the first response letter for an eFile. If your primary Reviewer is out of the office, eFiles will automatically redirect to your backup Reviewer, while keeping your primary Reviewer informed of the messages for when they return to office.
3. Turn on your notifications. If you do not have eFiles open throughout the day, make sure to enable your email notifications in the settings section to ensure you are alerted when your message is returned.
4. Brevity is key! In messenger, using language that is direct and concisely addresses the issue at hand is helpful. Lengthy replies can feel overwhelming for both parties and are best reserved for response letters.

5. Add links if necessary. For example, your visual treatment of a Nabisco was questioned and you would like to show the reviewer an example from a past piece to see if it would work in this piece. You can link the Reviewer to that file or document so we can have a look.
6. Use your annotations. Thinking about repositioning something? Want to highlight a particular section of the piece? Use the annotation tools to create arrows, circles, and other markups to help facilitate the discussion. Your Reviewer may do the same!
7. If you have provided a few options (a maximum of 3 please) for potential revision, please rank order them with #1 being your preferred option. We will generally comment on what is acceptable, so knowing your preferred option will help us focus our attention in the right area.

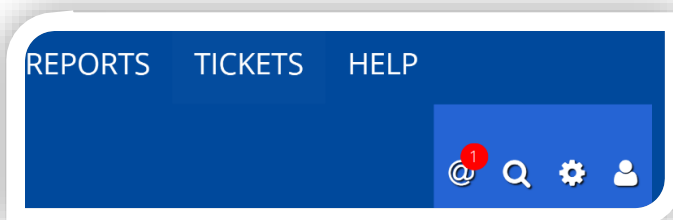
Receiving a Message:

Keep an eye out for notification. They will appear in one of two ways:

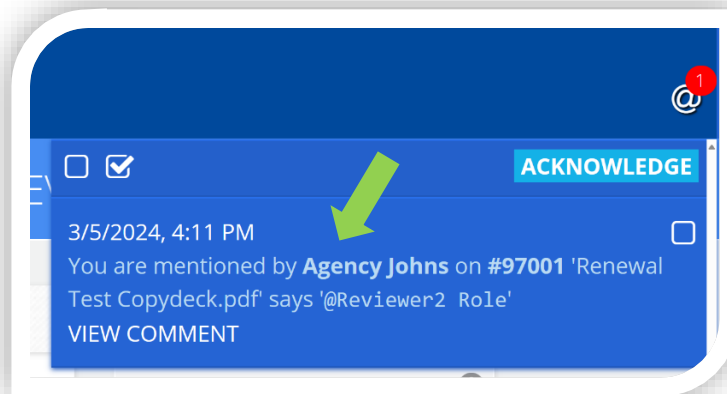
1. If you have your email notifications turned on, you will receive a notification to your inbox



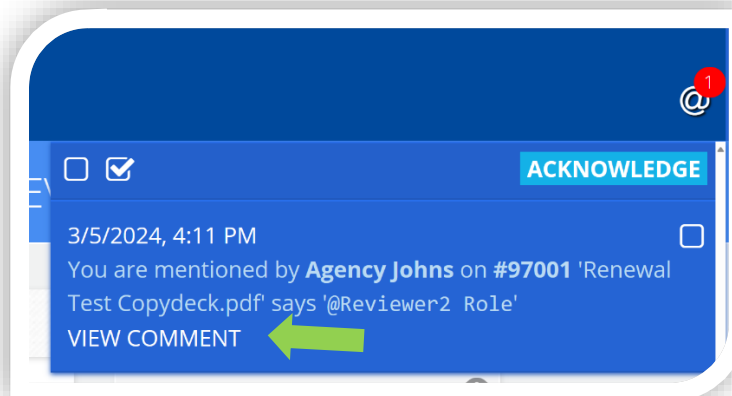
2. Regardless of your email notification settings, you will receive a notification within eFiles that looks like this:



If you click on it, you will see a preview of the message:



3. Click on “VIEW COMMENT” within the preview to be taken directly the spot in the document that the comment was made.



4. Review and respond if necessary.

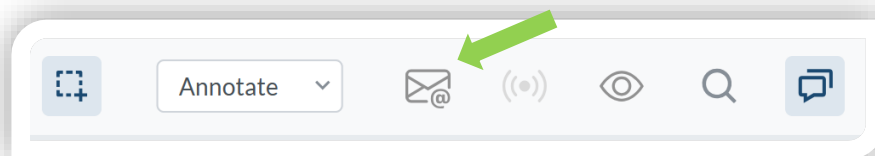
What Happens Next?

When you have received your clarification and are ready to proceed with formal revision, simply proceed as you normally would. Update your copy or layout with the agreed-upon revision and resubmit. In your cover letter where you address that particular point, please mention resolution of this point via messenger and that it was revised as agreed upon.

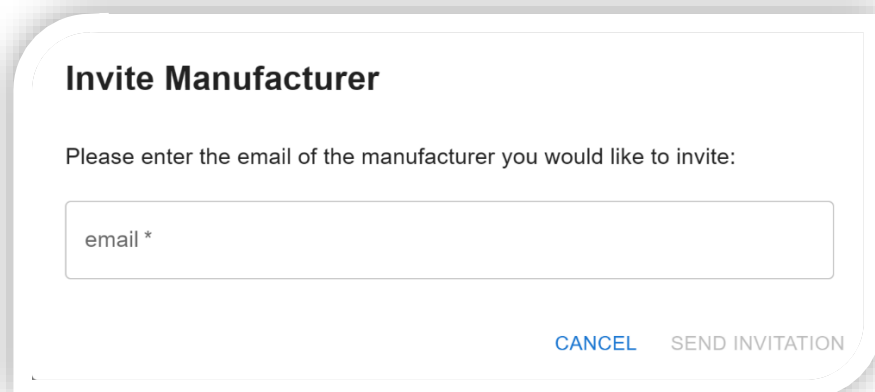
APPENDIX B – Using Messenger to Consult Your Team

Consult your client and your team! You can now send single documents along with your comment history on the file to non-eFiles users.

You can invite your client or colleagues to view a document by first clicking on the envelop icon in the top navigation bar:



A pop up will open that allows you to input the contact information of the person you would like to send the document to. **They do not need to be an eFiles user.**

A screenshot of a pop-up window titled 'Invite Manufacturer'. The text inside says 'Please enter the email of the manufacturer you would like to invite:'. Below this is a text input field with the placeholder text 'email *'. At the bottom right of the pop-up are two buttons: 'CANCEL' and 'SEND INVITATION'.

Upon entering the email and sending the invitation, the invited contact will receive an email invitation to register to see the file. Upon registering, the invited contact will only be able to access files they have been invited to collaborate on. Invited contacts follow the same method of using messenger as described in Section 2 – [Sending a Message](#). Please note that you will not be able to @mention this invited contact (i.e. they will not appear in the pre-populated list of contacts) until they have registered via the link in their email. The invited contact will also not see the document until they have been @ mentioned in your file.

Upon approval of that eFile, the file will disappear from the invited contact's list of available documents.

Interact With Your Own Team Members On Documents Within eFiles.

Not every @mention has to be directed at the Reviewer. You can @mention your team members who are associated with the eFile (i.e. listed as primary or backup contacts) and discuss issues and solutions on the file within eFiles. **Please note that while the Reviewers will not be notified of these @mentions between your team members, they will be visible to the reviewer upon opening the file.**

This helps facilitate discussion between your team on the APS document itself. When you have finished your discussion and are ready to respond to the reviewer, please @mention your primary Reviewer so they are notified of your response.