MIRABEL TECHNOLOGIES
The Next Generation of Automation

Getting Ready for the New Year
Your Best Practice Checklist

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In Website Setup:

☐ **Sitewide Defaults**
- ☐ Review additional insertion years setting

☐ **Ad Sales Management**
- ☐ Extend Publication Schedule(s) as needed
- ☐ Update Inventory as needed
- ☐ Update Products / Rate Cards / Pricing as needed
- ☐ "inactivate" old or no longer used
  - ☐ Products
  - ☐ Rate cards
  - ☐ Templates (Proposal, Invoice, Letters/email)
- ☐ Use the "close an issue" tool for clean comprehensive order entry

☐ **Posting Prepayments**
- ☐ Many people get payments at the end of the year for the next year's billing
- ☐ How to post - link to a Product / insertion order ect

☐ **QuickBooks**
- ☐ remember mapping is needed for any new Products and/or rate cards

☐ **Users**
- ☐ Update user goals/commissions as needed

☐ **Circulation**
- ☐ Build out Circulation Schedule if using this feature

☐ **CRM**
- ☐ Clean up database
  - ☐ Duplicates
  - ☐ Using the Merge tool
  - ☐ Primary Contact Switch

☐ **Marketing Manager**
- ☐ Use Email validation / verification to manage email addresses

- [ ] **Digital Studio**
  - [ ] Unpublish/Archive/remove any old digital editions and files that you may not want published and so that you are not charged in moving forward.

With the new year you should definitely begin to use your training hours! Schedule time with your consultant to make sure that you have activated and are using ALL of the features in the software that you may not even be aware of!

- [ ] Mobile App
- [ ] Calendar Sync
- [ ] Gmail Integration
- [ ] Merchant Integration *(can now pre-authorize/validate & store a credit card without running an actual charge)*
- [ ] Opportunities
- [ ] Email Capture
- [ ] Email Verification Tool
- [ ] E-signature
- [ ] Customer Portal *(manage subscriptions (CB), pay invoices and installments & manage/upload ad material for production)*
- [ ] Summary Email Notifications *(sales, calls/mtgs & year-over-year comparisons)*
- [ ] Kibana Dashboard Reports
- [ ] Digital Studio / Electronic Tear Sheets
- [ ] Monthly Backups
- [ ] Marketing and Email Automation via Marketing Manager
- [ ] New Production Module with print and digital calendars
- [ ] New Subscriptions and Recurring Revenue Platform