Release Guide

This document provides step by step instructions for how to use the new features in the 2023.3 release, grouped by module. Where applicable, testing notes are also included.

These are the most important takeaways / impactful changes that you *need* to pay attention to:

- There has been a change to Group Security in CRM. See below for full description and be sure to visit the Group Security screen and set the option "Allow rep and/or rep group selection on opportunity quick update and taskboard" to yes or no to have the rep filter displayed or hidden according to your rules.
- Adjustment request tickets are a new feature that you might want to check out, especially for former NCS Advertising/Adbase clients who had Adjustment workflow routing setup.
- We now support the ability to have fractional column widths in order entry, which will flow through to InDesign and to Naviga Plan. This will require a conversion to be run upon upgrade. If you aren't going to allow for fractional columns, you shouldn't see any difference, but do keep it in mind and book an order all the way through in test to make sure all is fine in your interfaces.
- If you are using Classified Self-Service, we have added another color customization option. You will definitely want to visit this and decide what color suits your overall color scheme. See below for more info.

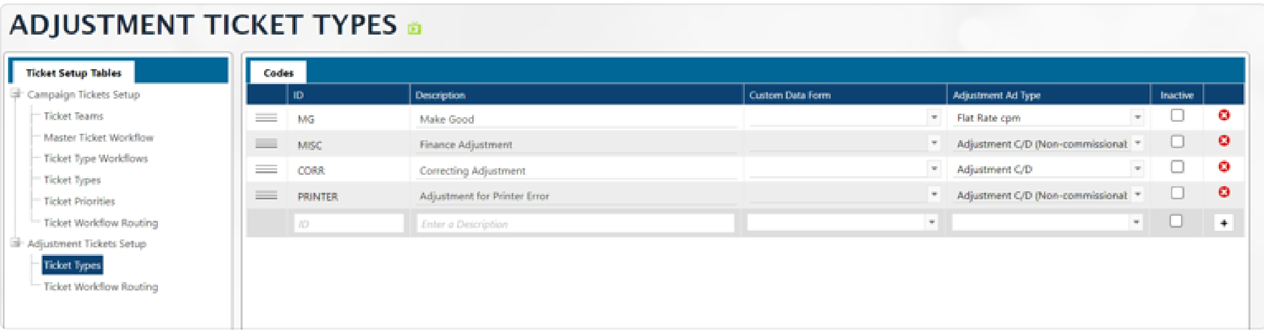
Advertising Module

Adjustment Request Tickets

There is a new kind of tickets now available that are specifically for adjustments. This workflow has hard coded workflow statuses, but customizable structure of ticket types and adjustment levels so that different users / teams can be assigned based on the value of the adjustment and the ticket type. Additionally, you may have different routings assigned for different Product Groups and/or different ticket teams.

Setup

First, Navigate to Setup → Advertising Setup → Ticket Type Setup. Notice there is a new section here for Adjustment Tickets Setup

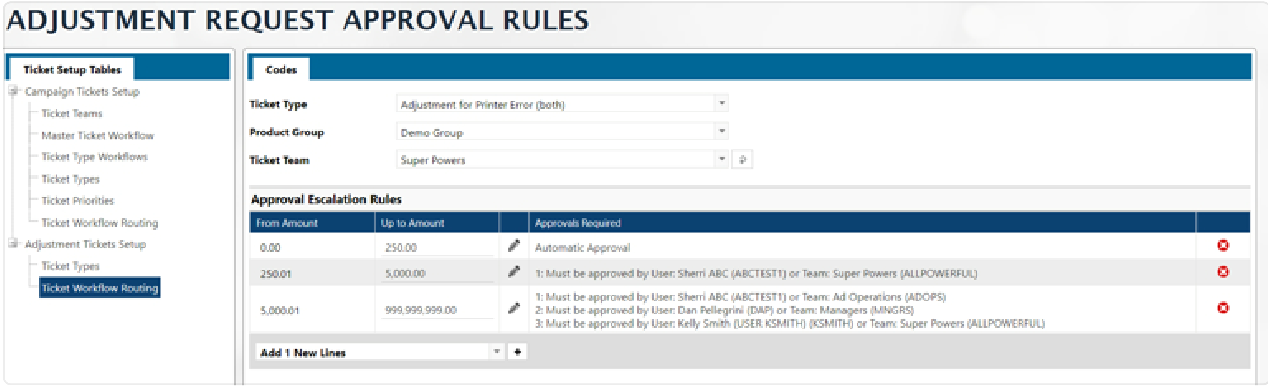


Enter an ID, Description, and an ad type. The Custom Data form is optional. If you have additional form data you wish to have the user fill in related to the ticket, you can assign a form to the ticket type.

The Ad type dropdown will only display flat fee ad types that are not flagged with the Listing ad flag. The Ad type selected here will be the ad type on the adjustment line created once the adjustment is approved. You may wish to have ad types specific to these adjustments. Whether or not the ad type is flagged as commissionable to the rep will determine whether or not the rep's commission is adjusted based on the credit/debit adjustment.

> Note: The G/L Type on the line will be determined by the G/L Type on the original order line.

Next, Select the Ticket Workflow Routing node.



Select a Ticket type in the drop down.

If this same workflow routing will be used for all product groups and ticket teams, the product group and/or Ticket Team fields can be left blank and then click the circular arrow.  If you will be setting up different routing for different product groups or ticket teams, then select the one or both of those fields, and then click the button.

When making assignments for approvals, the "Ticket Team" for routing purposes will be determined by:

1. The User ID of the first Order Rep on the Campaign
2. If the rep isn't a system user or if that user isn't on a team, then the Logged in user's Team will be used (the person creating the ticket)
3. If they don't have one, then the ticket owner team will be used.

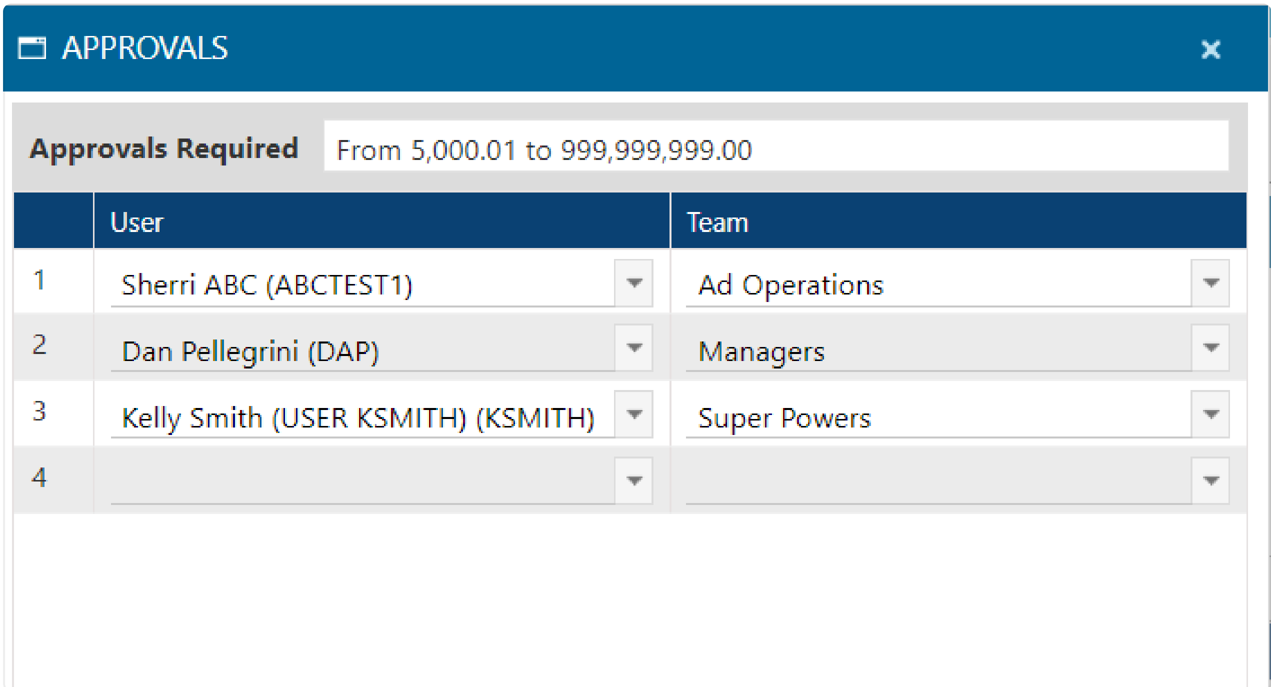
Once the team is derived from above, then we follow this logic to find a matching approvals workflow (from most specific to most granular):

1. Ticket Type, Team and Product Group all match
2. Ticket Type and Team match
3. Ticket Type and Product Group match
4. Ticket Type matches

Use the “Add New Lines” drop down to select the desired number of lines – one for each number band you wish to set up. In the example above, I have 3 number ranges, each with a different workflow for who must approve the adjustment. Within each band, you can have up to 4 approvers defined.

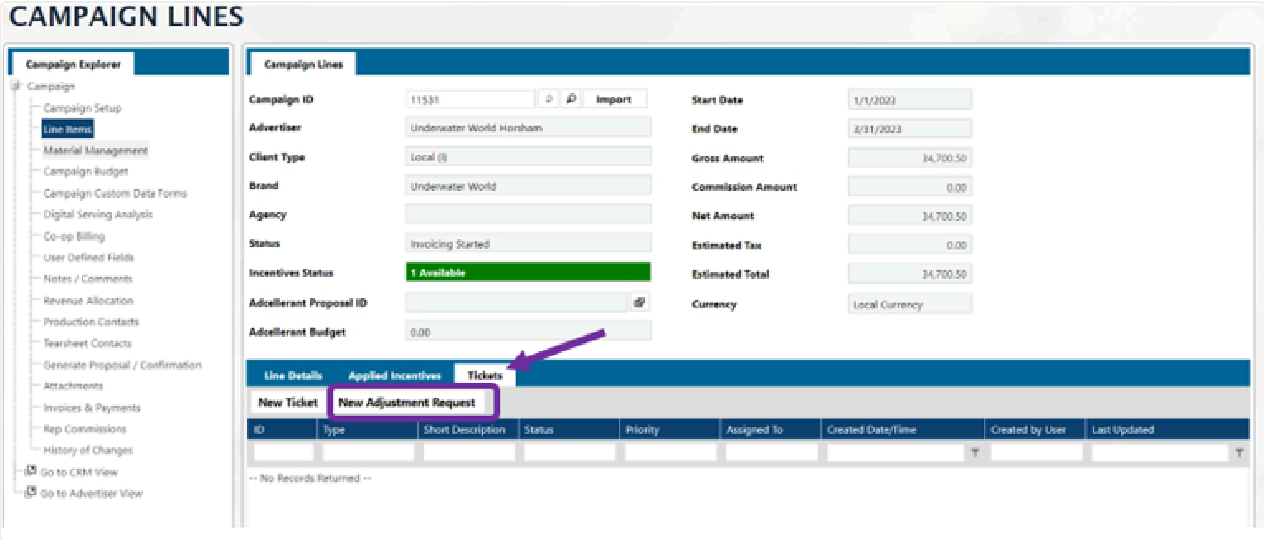
Using the screenshot above as a reference, I have these rules in place for my “Adjustment for Printer Error” Ticket Type (click on the pencil icon next to the band to set up the following):

1. Up to $250 – the ticket doesn’t need approval; the adjustment will be automatically created upon save.
2. From $250-5000 – there is only a single approval required. According to my setup, this can be done by either the user “Sherri ABC” or by anyone on the Super Powers team. You don’t have to select both a user and a team. It can be one or the other or both. Having a team assigned also is handy if Sherri is out of the office, someone else can step in and approve on her behalf.
3. From $5000+ – Sherri ABC is the first approver, but it also needs to go to Dan and then Kelly. Once the final approver approved the ticket, the adjustment lines are automatically created.

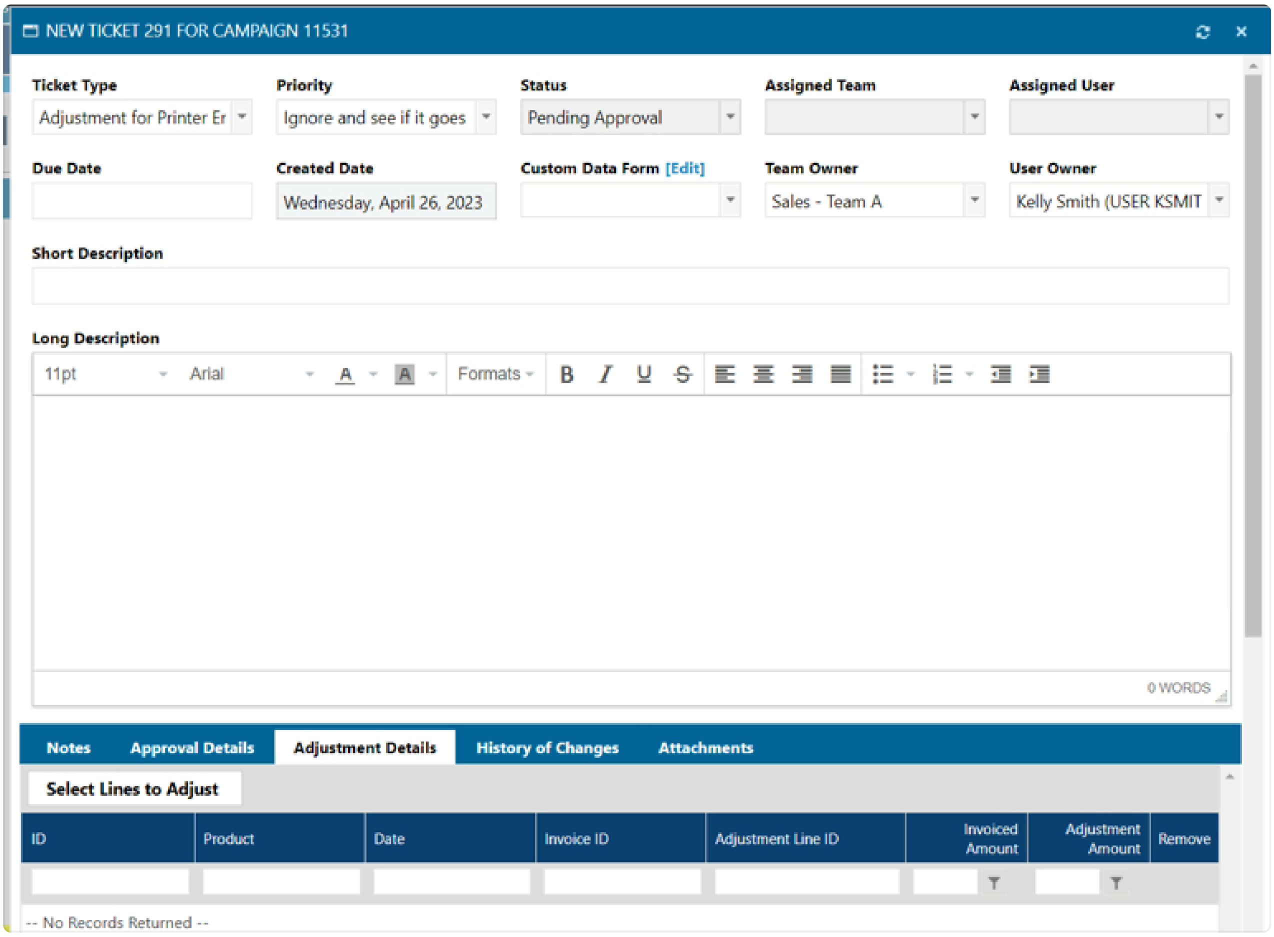


Creating an Adjustment Ticket

Adjustment tickets are created on the campaign that is being adjusted. The lines being adjusted must have already been Invoiced. These are post-billing adjustments. Select the “Tickets” tab on the screen and then click the New Adjustment Request button:



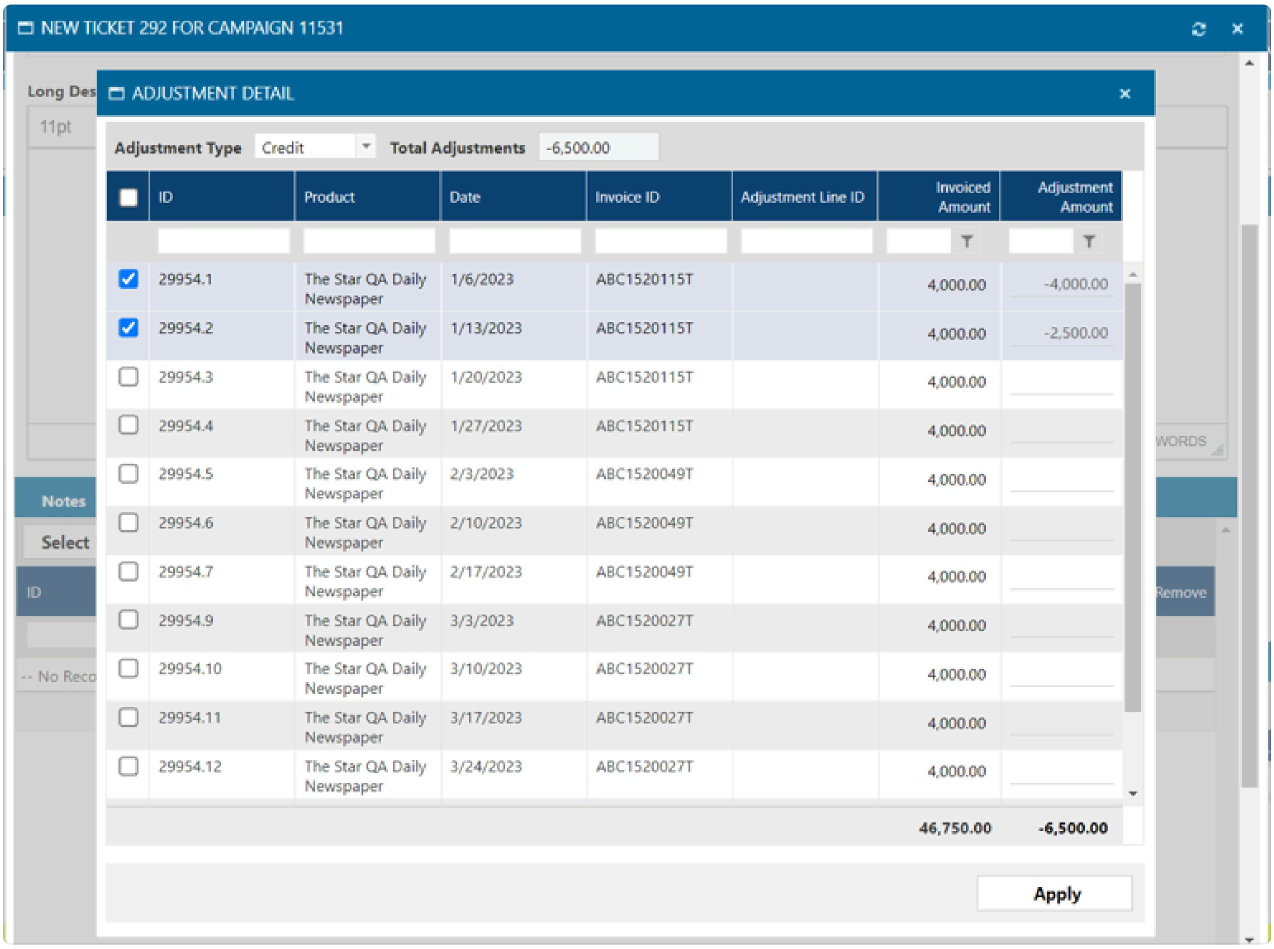
The New ticket form will open. For those already using regular tickets this form will look familiar. There are some differences though between a regular ticket and an adjustment ticket.



1. The ticket type dropdown will only show the Adjustment ticket types.
2. The priority field has the same options as a regular ticket.
3. The status field is not selectable in this workflow, since the status is action driven. A new ticket will always be “pending approval.” Statuses are as follows:
    1. **Pending Approval** - new, pending approval, can still change the value of the request and the lines you selected.
    2. **Partially Approved** - one or more approvals have been received, but more are needed.
    3. **More Info Required** - an approver has requested more information; this ticket is assigned back to the "owner."
    4. **Approved**
    5. **Denied**
4. The assigned team and user is blank at the moment, b/c this will be automatically determined by the value of the adjustment requested.
5. If a custom data form was selected on the adjustment type, it will be pre-filled here, otherwise a user can select to manually add a form, or it can be left blank

if it isn't needed.

6. The user owner and team owner will be auto filled based on the creating user and their team. This can be changed (if the user is creating the ticket on behalf of someone else)
7. Enter a short description (required) and long description, if desired. This will assist the approving user in knowing what the adjustment is for.
8. Click the “Select Lines to Adjust” button. A popup will open and display all the invoiced insertions on the campaign.



By default, the adjustment type will be credit. Can select debit if the adjustment isn’t a credit. The amounts will be forced to negative if they are credits, positive if they are debits. If some lines are positive and some are negative, the user can change from credit to debit before applying and some lines will get a positive adjustment (when debit was selected) and others will get a negative adjustment (when credit is selected).

Select the lines you wish to adjust or start typing the value in the adjustment amount and the line will be selected for you. If you select the line, it will default to full adjustment on that line, but the user can override that and type in a lesser amount.

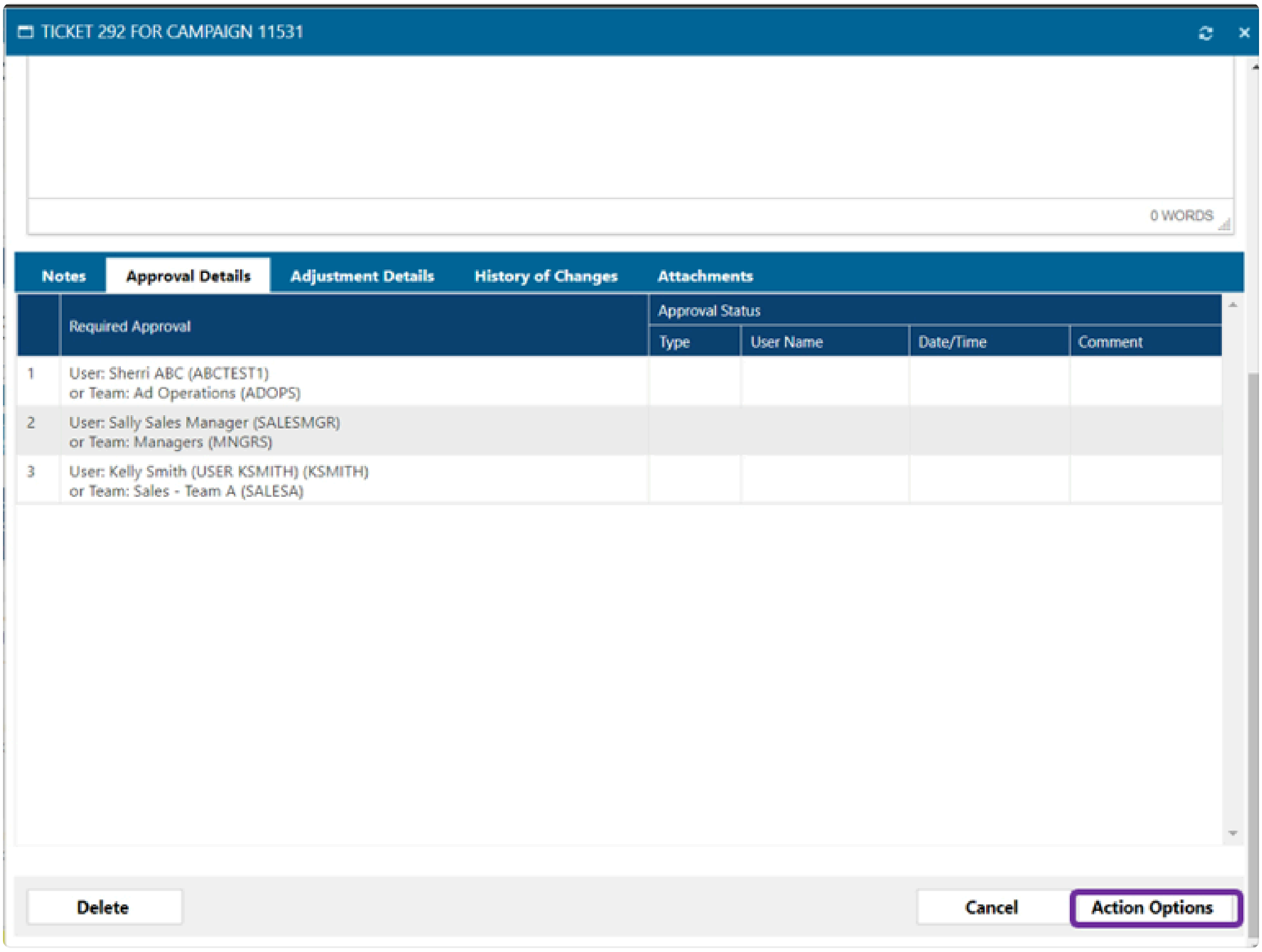
The system will keep a tally of the total amount of the adjustment.

1. Click Apply
2. The Assigned Team and/or Assigned user will adjust based on the amount of the adjustment.
3. Click Save and the user is returned to the campaign screen and the Adjustment request is sent to the appropriate user (along with an email alerting the assigned user that they have an adjustment to approve).

Approving/Managing the Adjustment Ticket

The approving user will receive an email with a link to open the ticket. Alternatively, the ticket can also be found on the Adjustment Request Dashboard. (Advertising Module → Campaigns Menu → Adjustment Request Dashboard)

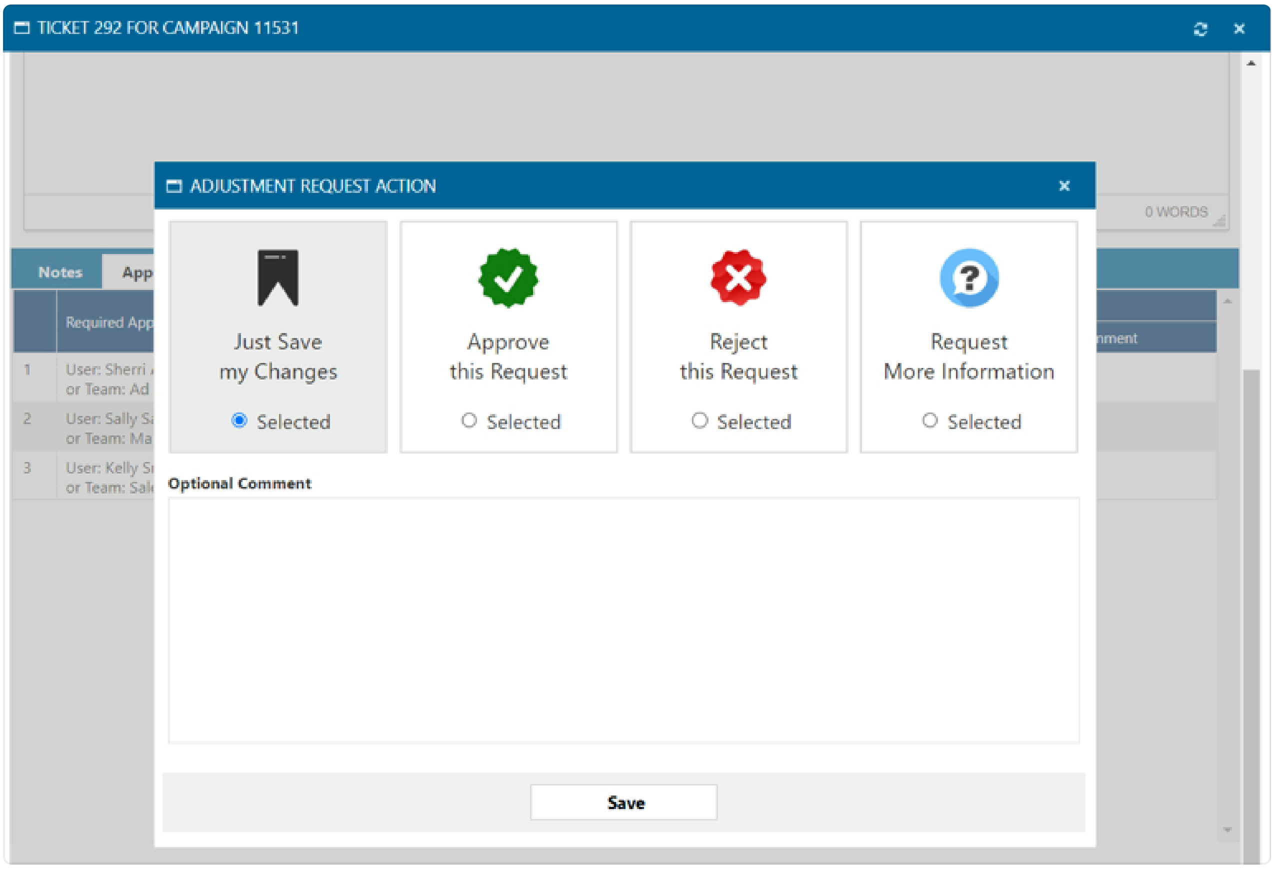
Only the approving user (or a member of the assigned team) will be able to approve the ticket.



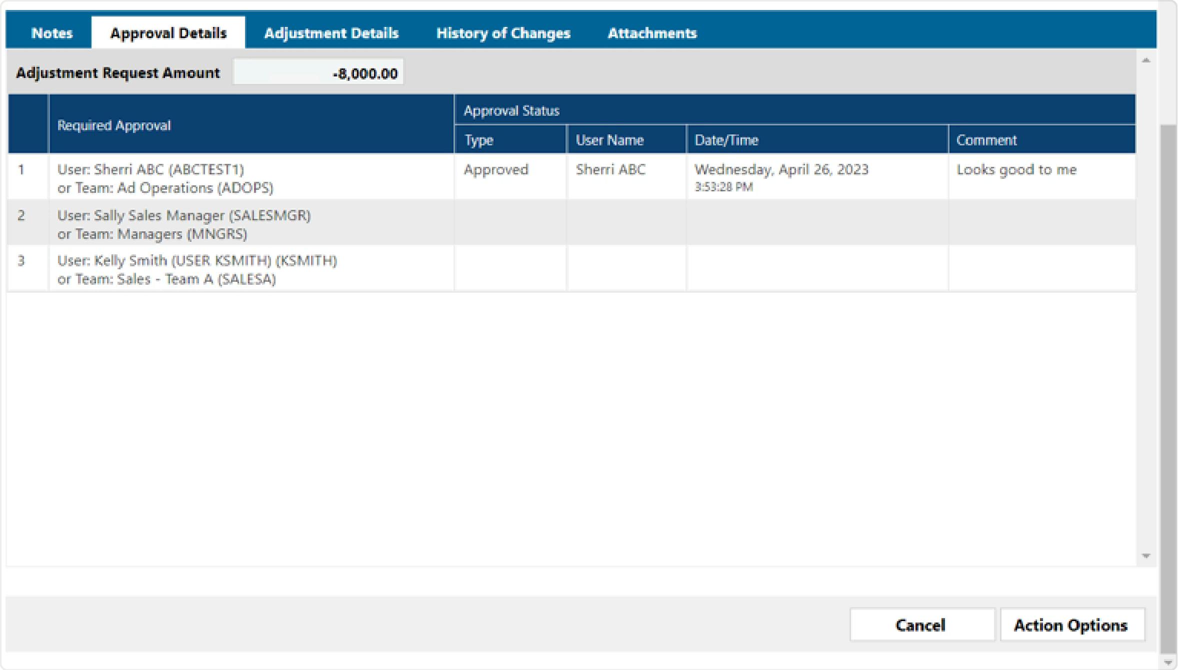
Other users may be able to open the ticket, but the Action Options button will only be displayed to the assigned user.

While the ticket is in “Pending” status, the adjustment details tab can still be modified, or the entire ticket could be deleted.

When the assigned user clicks the Action Options button, the actions dialog opens with several choices:

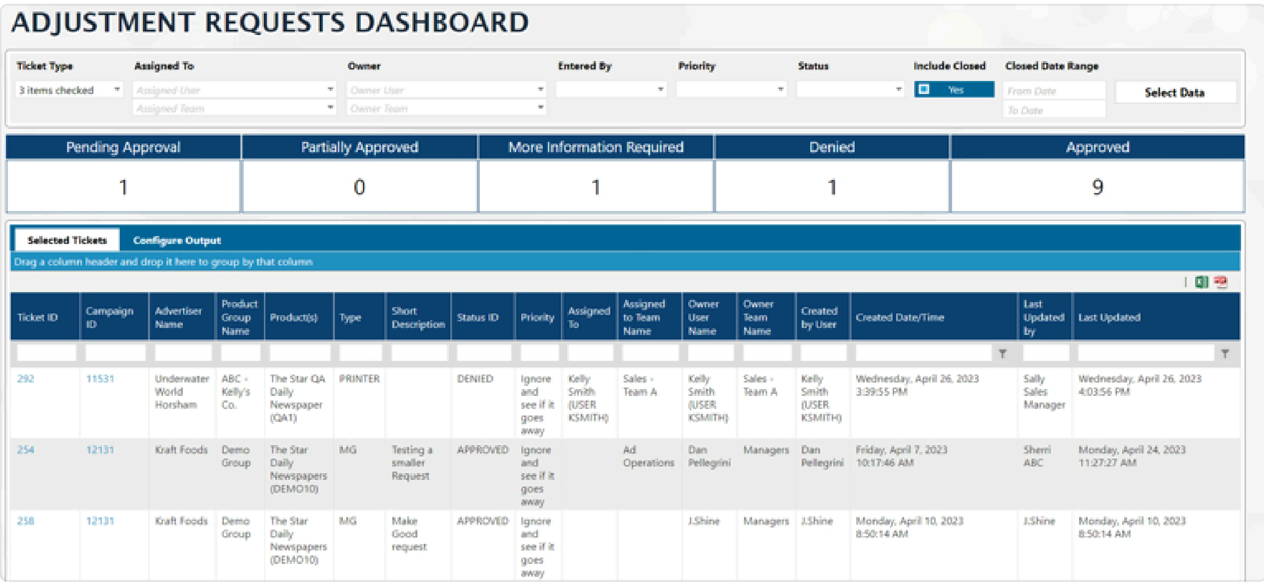


- To only make a comment, enter the comment and select “Just Save my Changes” this will leave the ticket in pending status and assigned to me
- Select “Approve this Request” to record my approval and create the adjustment (if I am the only approver) or update the status to Partially Approved and move the ticket to the next person in the workflow. Now, the next user in the workflow will get an email directing them to the Adjustment Request Dashboard.
    - When the ticket is past the “pending” status, the delete button will no longer be available nor will the option to edit the adjustment details

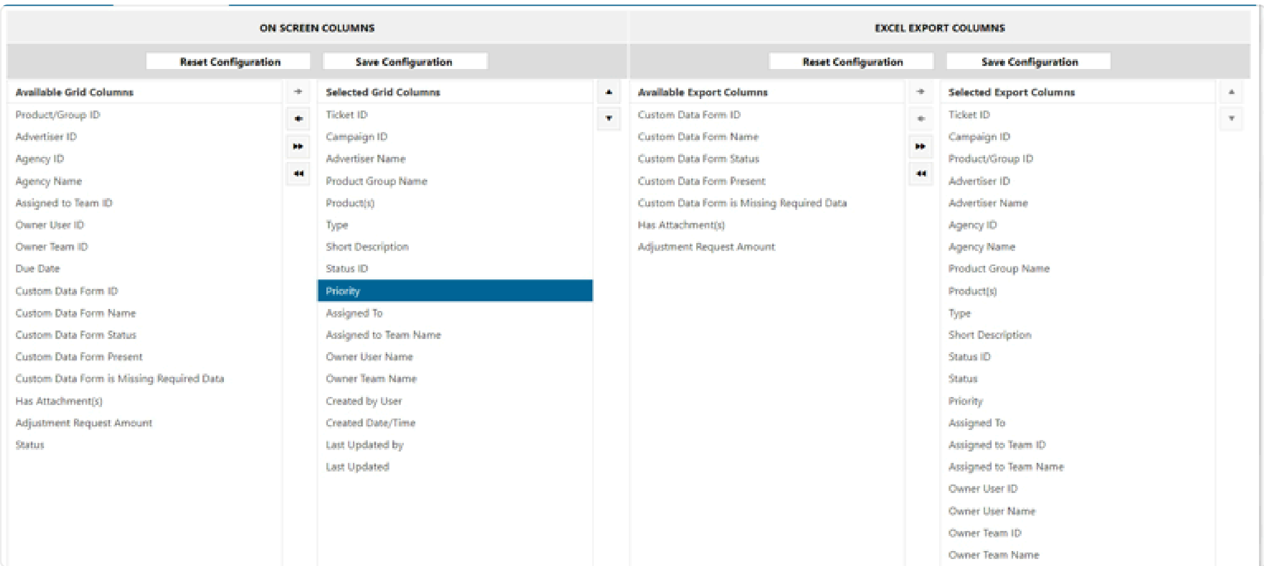


- If the user selects the option “Request More Information” the ticket will go back to the Ticket Originator and will be placed in the More Info Required status until the user enters additional information and re-saves the ticket. Upon save, the user will be prompted if they would like the ticket to re-enter the workflow. It will be reassigned back the manager who requested the information and doesn’t have to go back to the manager who already approved it (if there are any).
- If the ticket request is denied, the originating user will receive an email informing them that the request was denied.

The Adjustment request Dashboard is visually similar to the Tickets Dashboard. There are several filters across the top and a count of how many tickets are in each of the hardcoded statuses. User can select to view closed tickets or not.

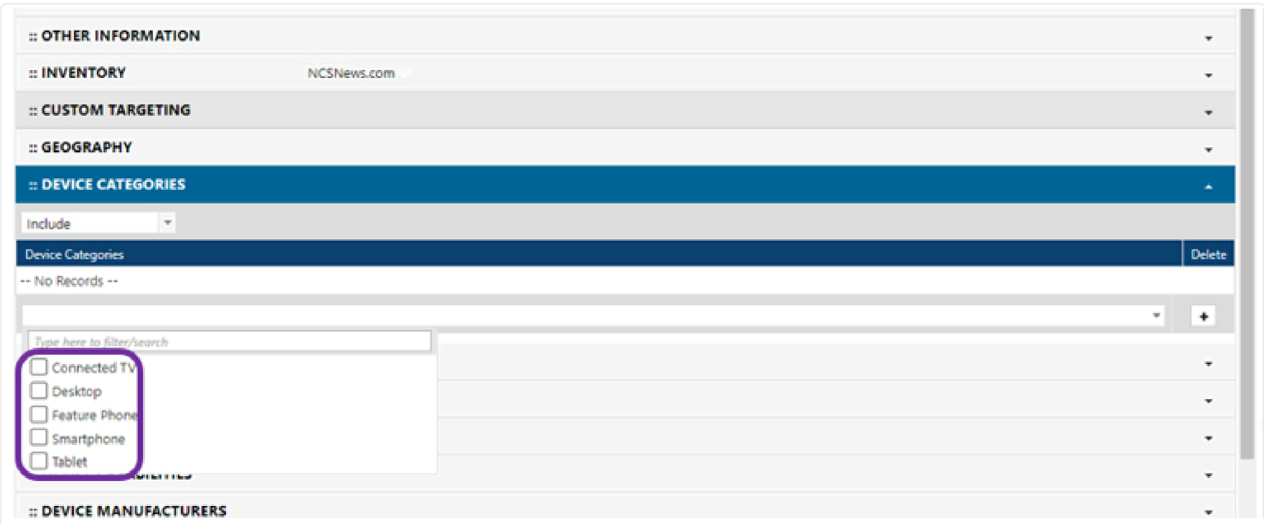


The configure output tab allows each user to customize their dashboard to show the columns they wish to see.

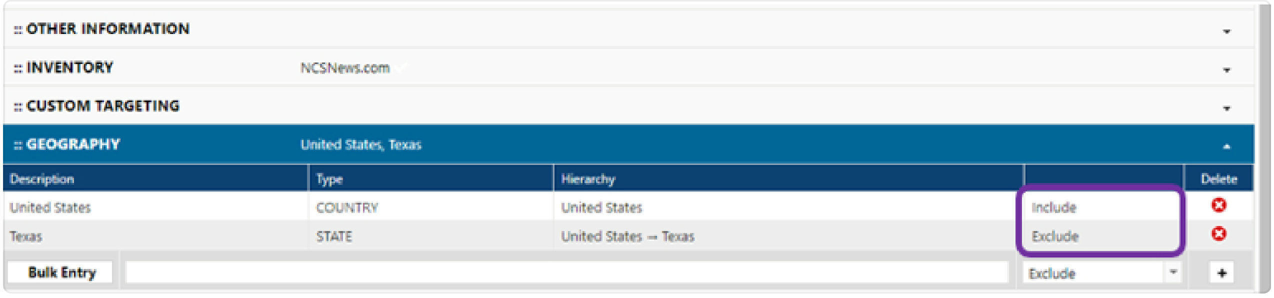


GAM Targeting Changes

In order entry of a GAM line, you can now multi-select on device category to quickly add multiple device categories. Previously you needed to add one at a time.

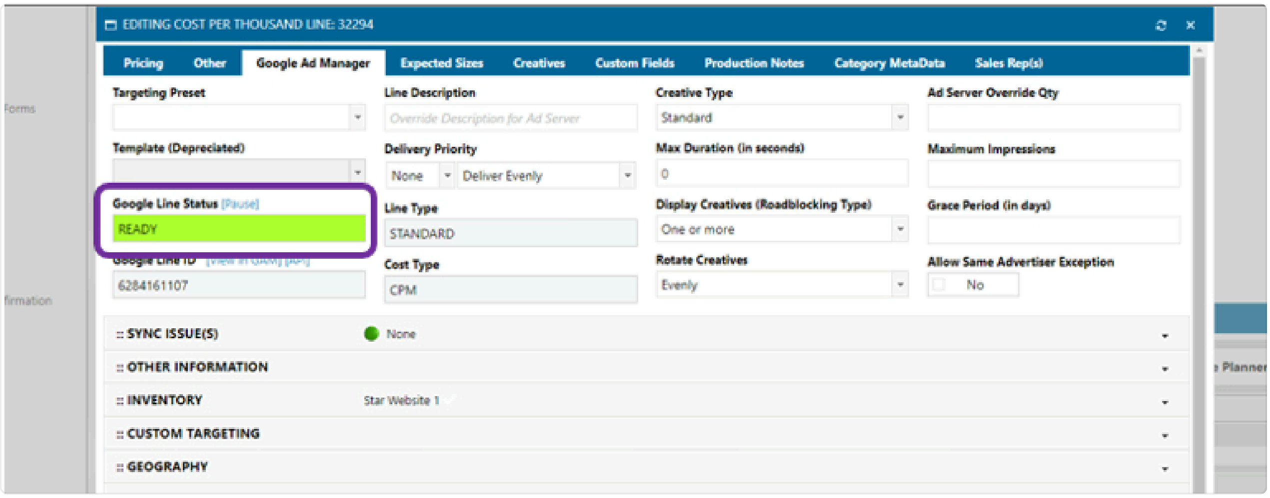


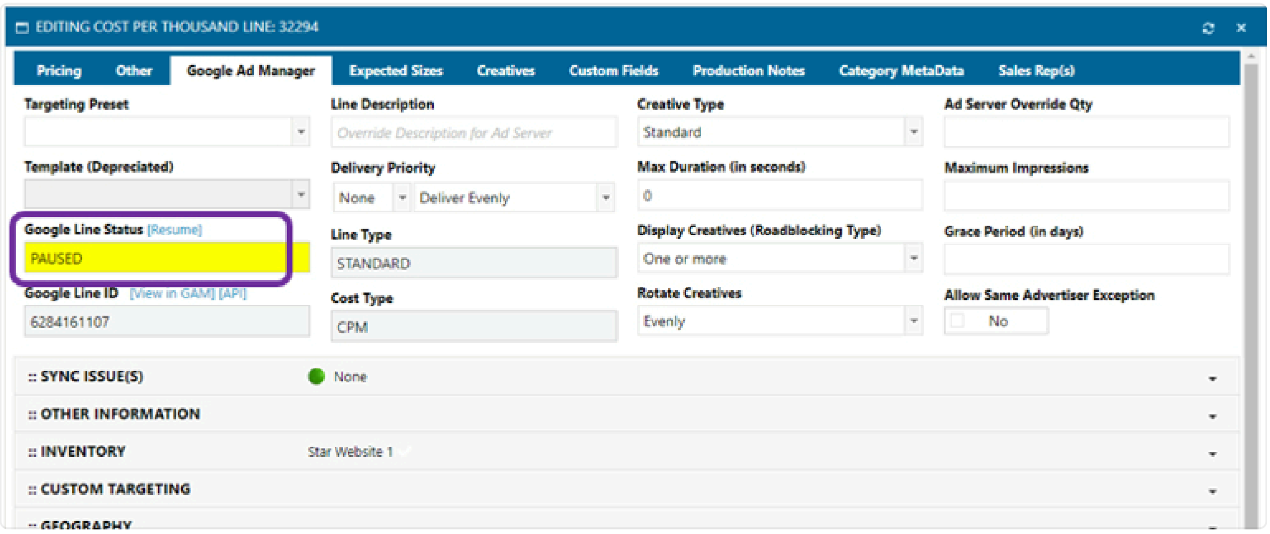
Geo Targeting now can include some targets and exclude others. Previously it was one or the other.



Pause/Resume GAM orders in Naviga Ad

We can now Pause and Unpause a running GAM line from inside Naviga Ad.





An order that is paused in GAM will be displayed here in Naviga Ad as well. Only a paused order will show the option to Resume. Only a running or ready order will show the opion to Pause inside Naviga Ad.

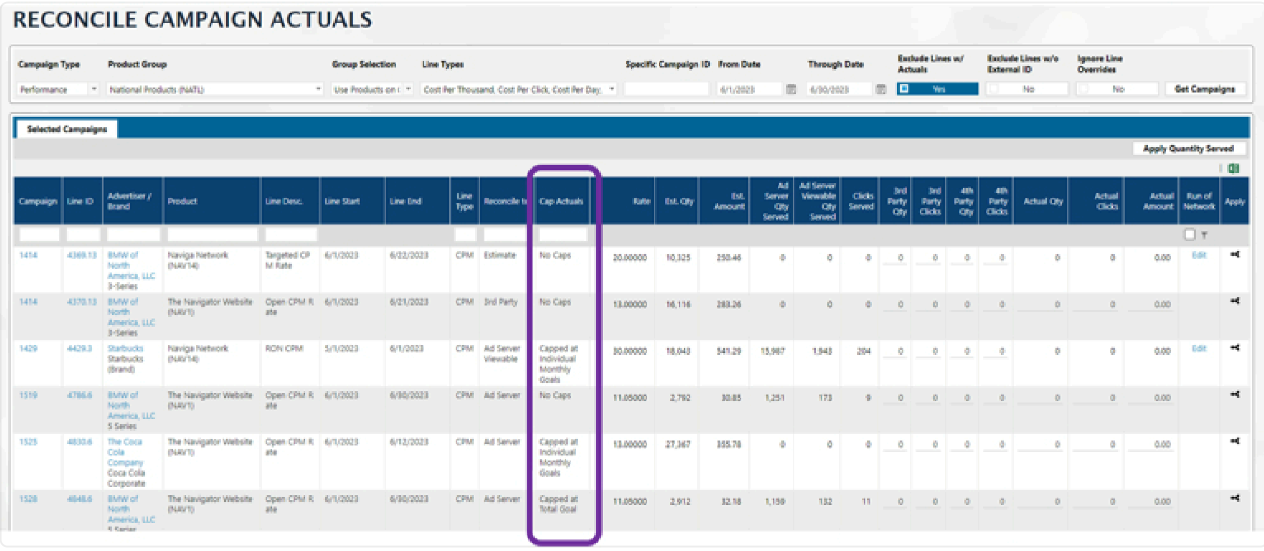
New GAM Account Substitution Field

When creating a new account in GAM, you can now append the Naviga Account ID to the Name in GAM. In the Advertiser Suffix field on Product Group setup or on the Connection Setup, add {NAME_ID} and the Account ID of the advertiser will be added to the Advertiser name in GAM. Anything entered on the Product Group will be used as an override to settings on the Connection Setup.

ⓘ This is a new feature in 23.3, but we were able to patch it back to 23.2 as well, so you will also be able to use it there if desired.

☑️ Field Change on Reconcile Actuals

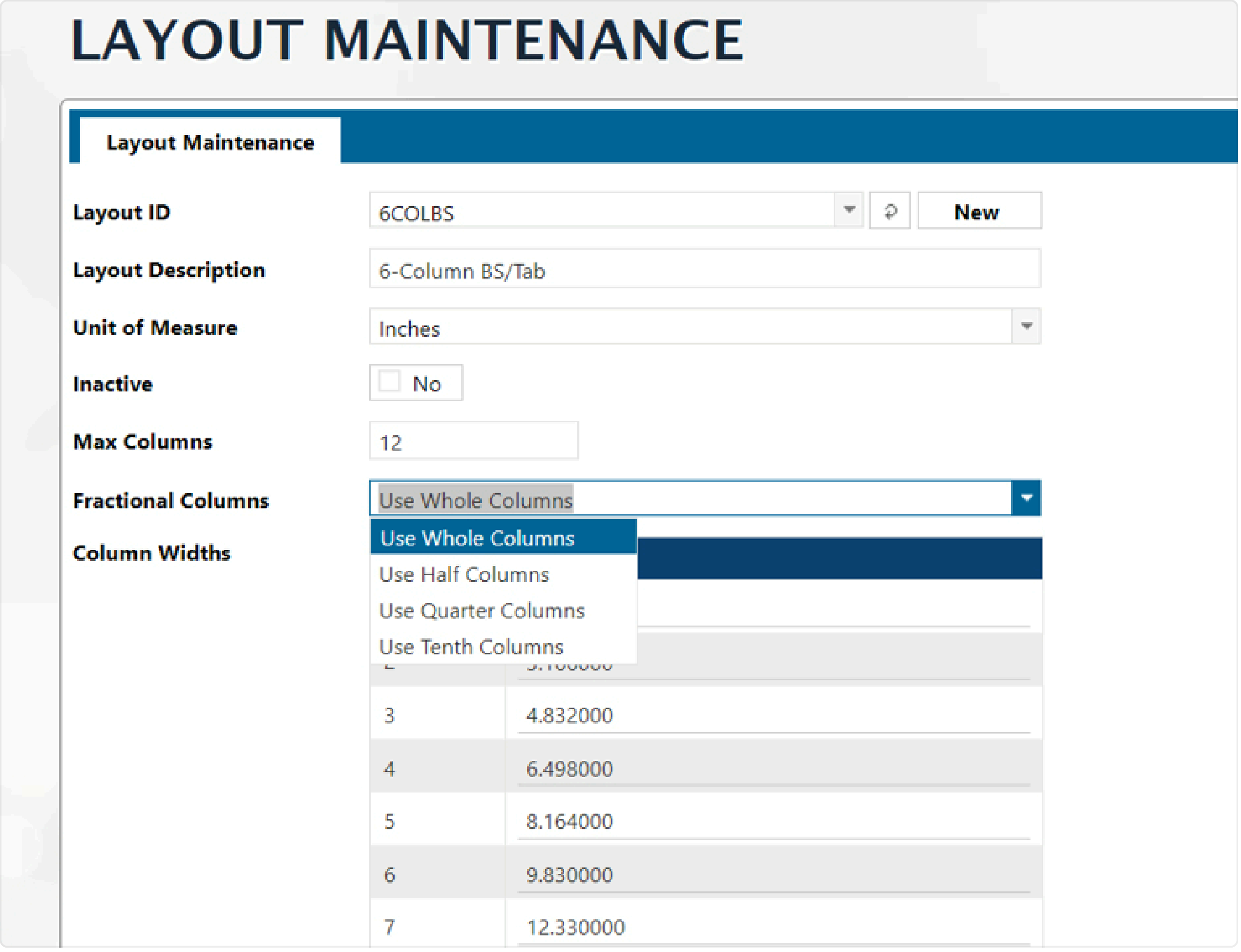
In a previous release, the yes/no flag for capping actuals on accounts and orders was changed to a dropdown that allowed for actuals to be not capped at all, capped on the monthly estimates, or capped on the total goal. In this release we have also changed this report (found in Advertising Module → Campaigns → Reconcile Campaign Actuals) to better reflect these new options.



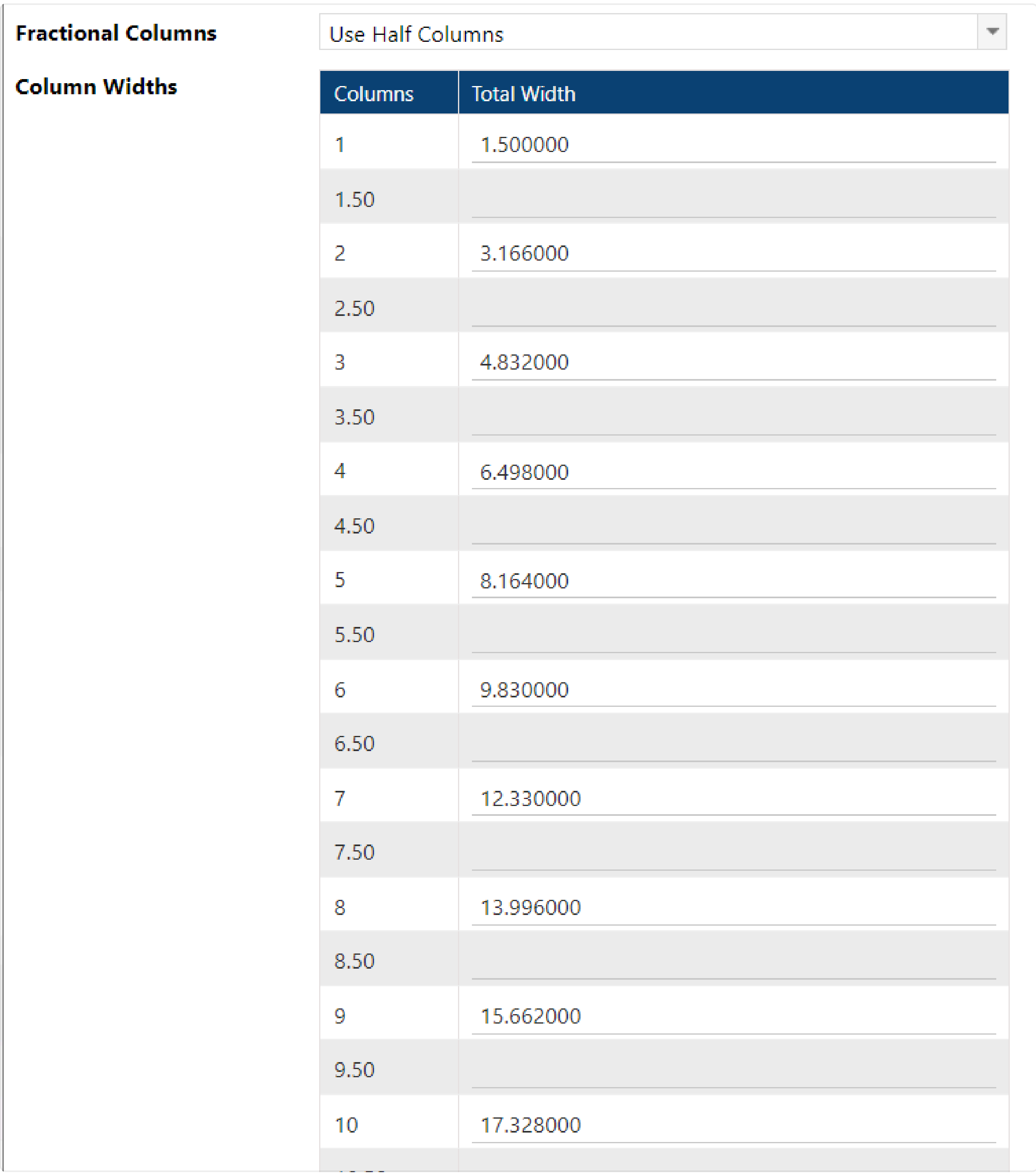
Fractional Columns Support

Some of our customers allow clients to place orders in fractional columns. So for example, you might have a 2.5 column x 6 inch (or CM or MM).

To accomodate this, there is a new setting in Column Layout Maintenance (Advertising Module → Setup → Advertising Setup → Column Layout Maintenance. By default upon upgrading, all layouts will be set to use Whole Columns, which is what is allowed today. A data conversion will run during the upgrade process to allow for this.



If you would like to support half, quarter, or tenth column increments, select that from the dropdown and then add the appropriate measurement in the blank for each new column unit.



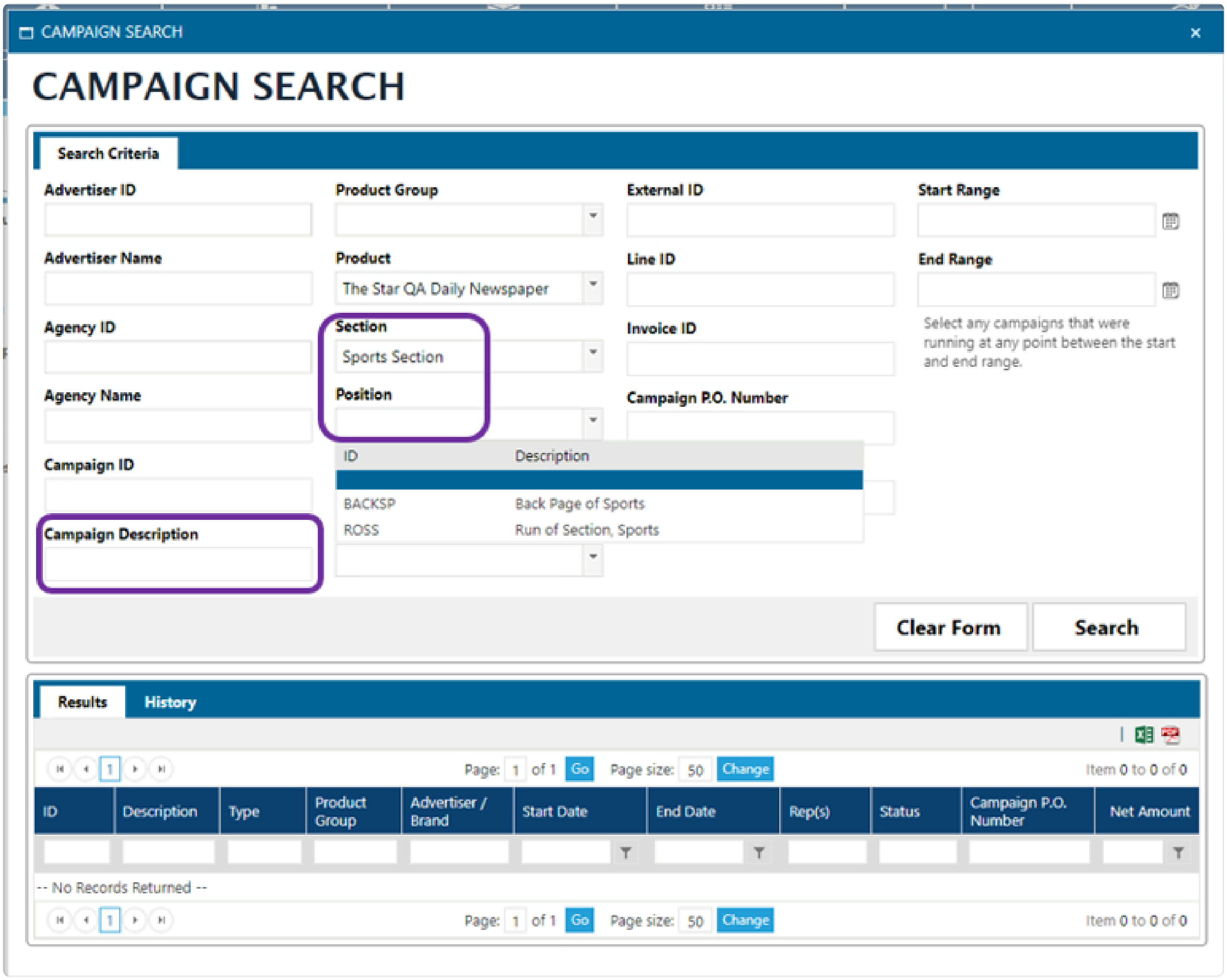
Fractional Columns: Use Half Columns

Column Widths

Columns	Total Width
1	1.500000
1.50	
2	3.166000
2.50	
3	4.832000
3.50	
4	6.498000
4.50	
5	8.164000
5.50	
6	9.830000
6.50	
7	12.330000
7.50	
8	13.996000
8.50	
9	15.662000
9.50	
10	17.328000

Campaign Search Makeover

In a campaign, if you click the magnifying glass to the right of the Campaign ID, it will open the search window. The layout has been reworked a little and some new fields have been added.



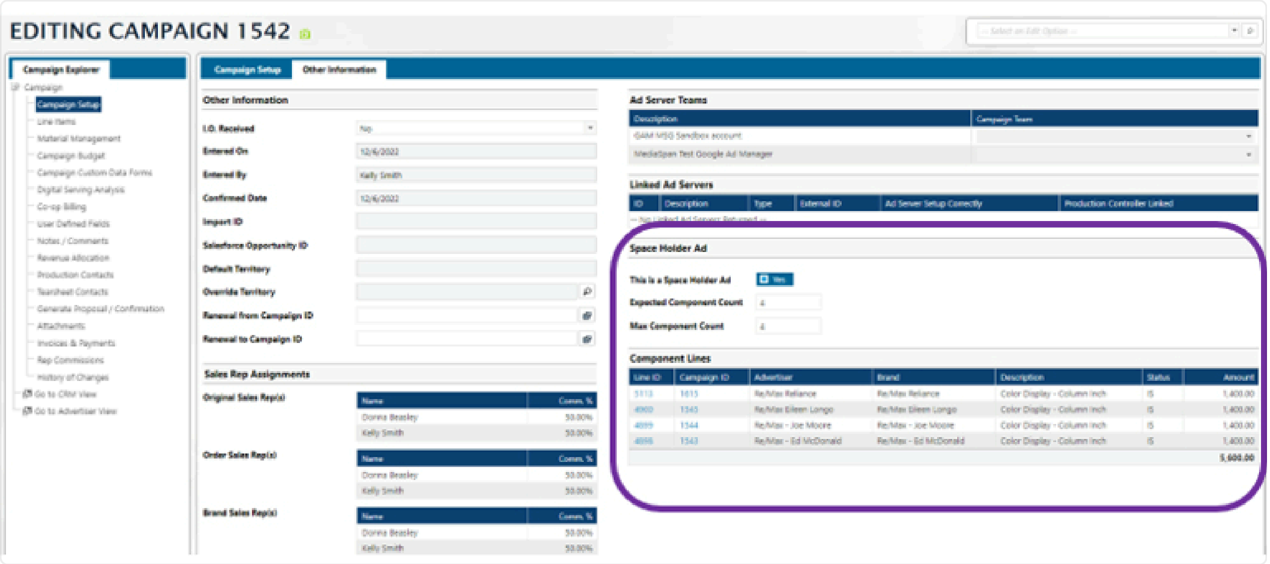
New Fields Added:

- Campaign Description
- Section
- Position

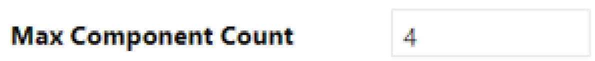
To use section and position, first select a product, then the sections will populate with sections for that product. Once a section is selected, then the position field will populate with positions for that product. If the positions are not dependent on sections, then they will populate when the product is selected.

Max Component Count for Spaceholders

A Spaceholder (Parent) Ad can now be set to have a maximum number of component (Child) Ads.

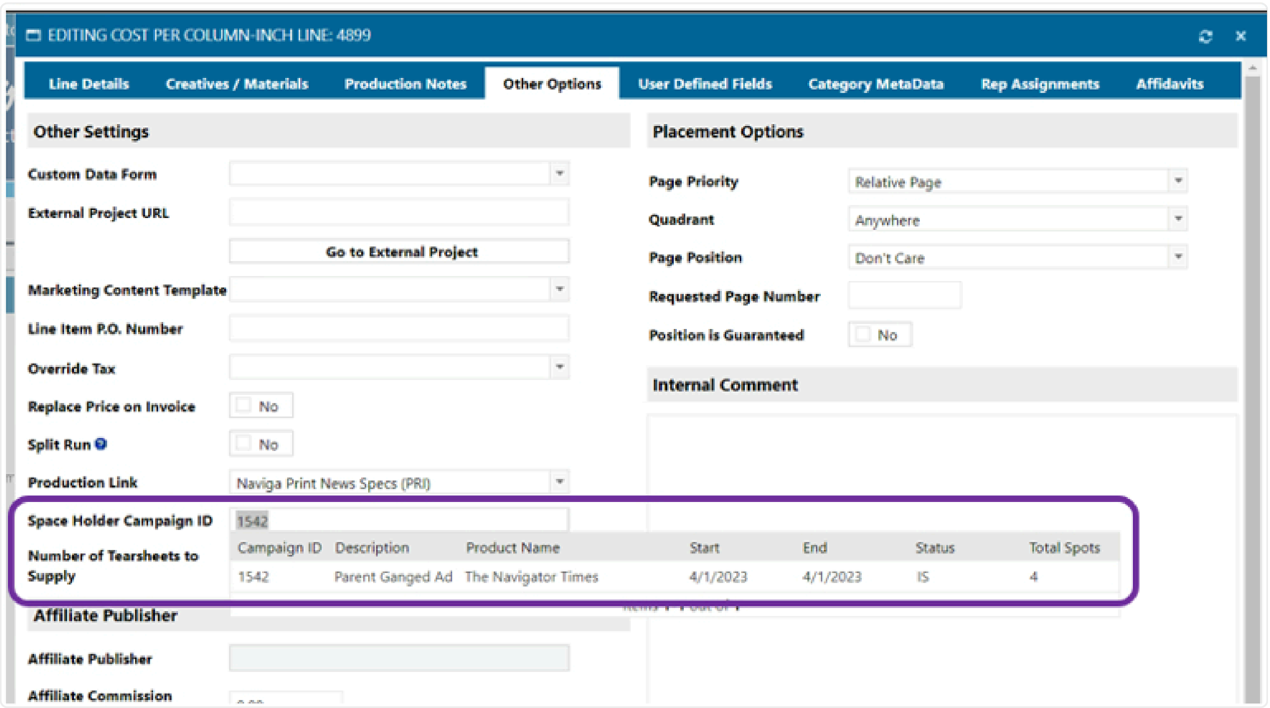


In the Spaceholder Ad section on the parent campaign, you will find a new field for Max Component Count:

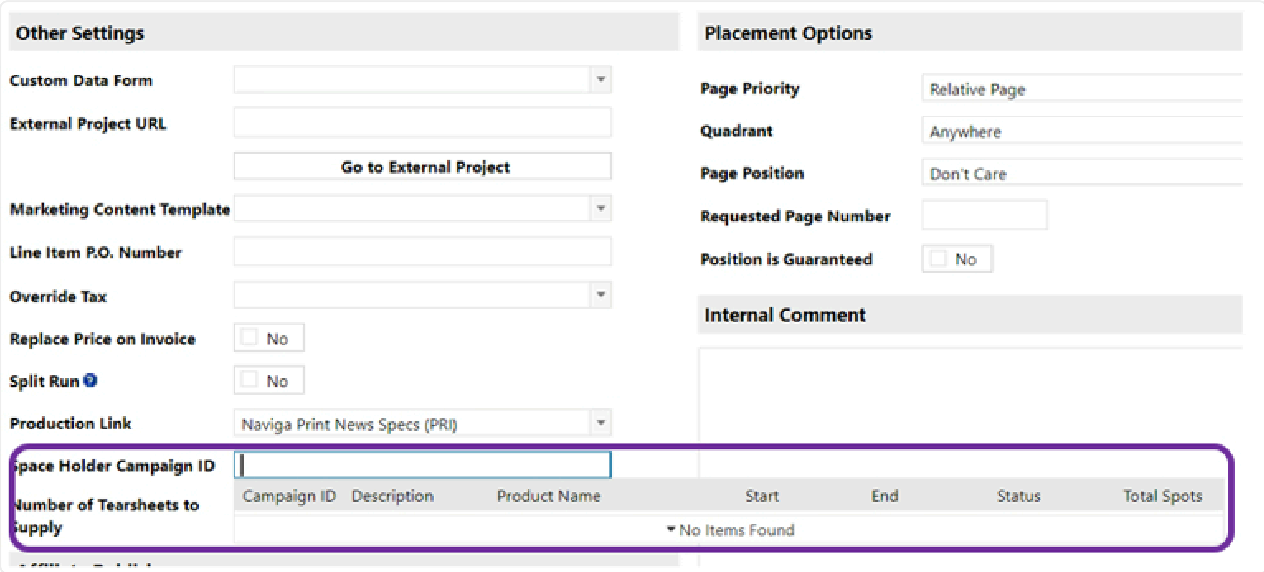


If a max count is set on the parent, when booking child ads, the parent will no longer be listed in the Spaceholder Campaign ID dropdown on the child line.

This is what it looks like when there are remaining spots left:

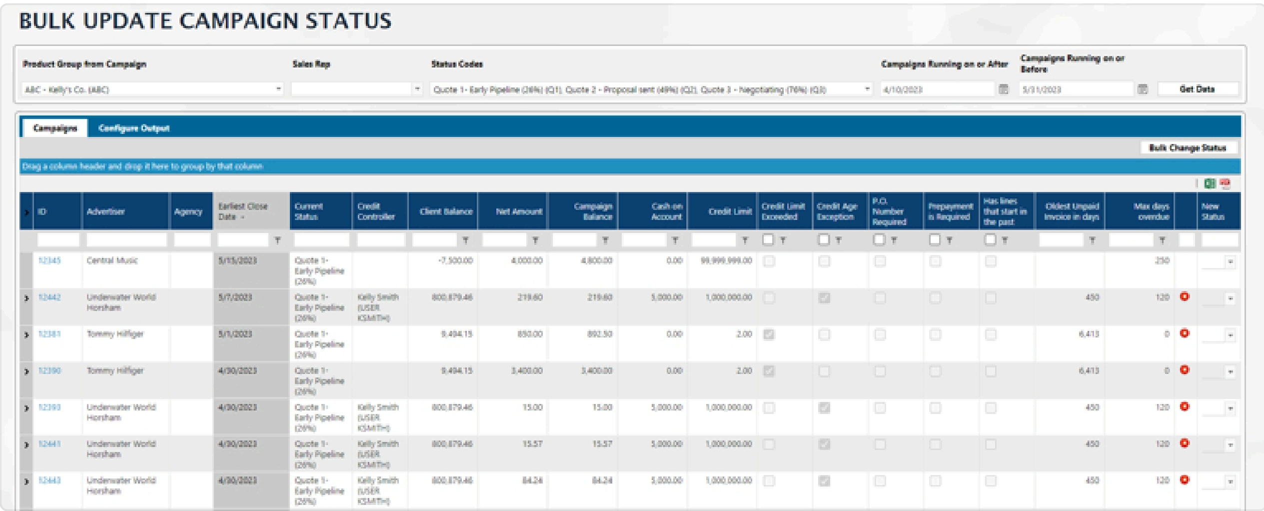


And when all the spots have been taken:



Bulk Update Campaign Status

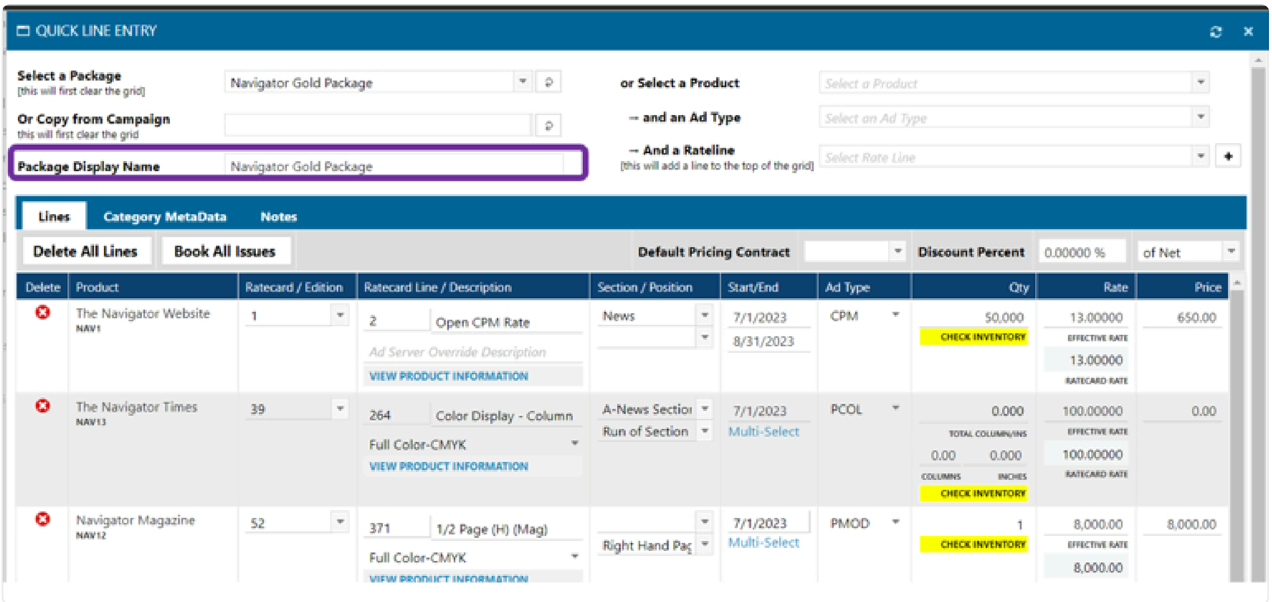
The Bulk Update Campaign Status report now has a new field that can be added to your display – "Earliest Close Date." Some users prefer to sort or filter this report by the earliest close date to only focus on campaigns that are coming up against the deadline. Adding this new field to your screen will allow for that.



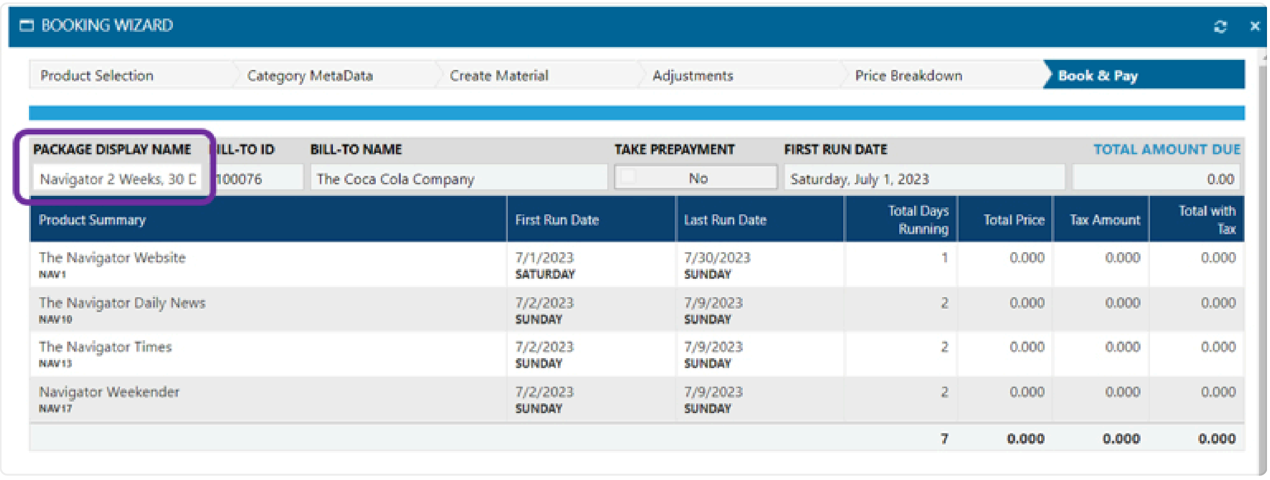
Grouping Line items into Packages

When booking a package (either in Quick Line Entry or in Booknig Wizard), there is a new field called "Package Display Name."

It is here for QLE:

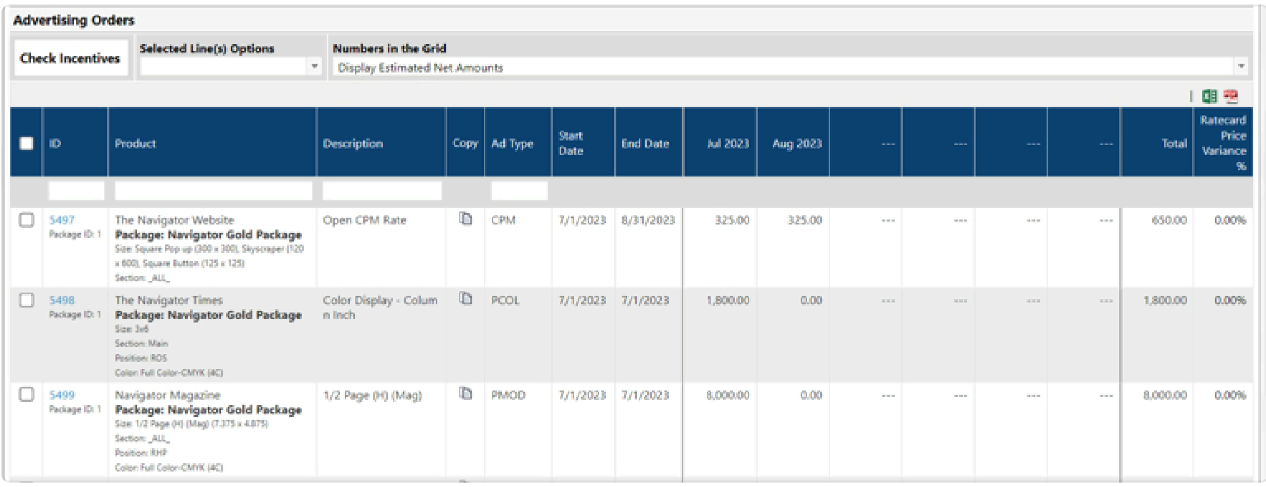


And in BW it is on the last step in the workflow here:

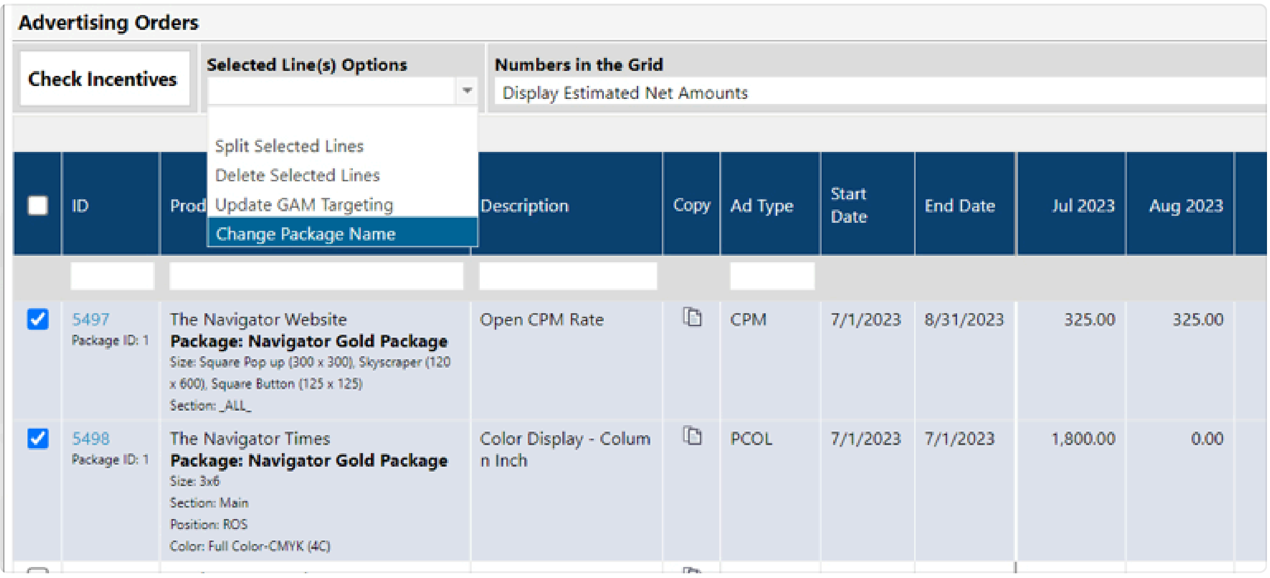


If you are booking via package that field will default in with the name of the package. If you are not booking by package it will just be blank. Override the package to a more user-friendly name, if desired.

When the QLE or BW process has been completed and the lines are listed on the campaign, then these lines will be displayed, along with their package name (in bold below):



If it is then desirable to change the name, or to group them differently than the original package for display in the order confirmation, that can be accomplised by selecting the rows to be changed and then select the line option dropdown and pick Change Package Name



A pop-up window displays with the current name of the package (might be blank if it wasn't originally booked as a package) and enter the package name.

As an example, you can see below that there are several lines to this campaign. The first two I named Navigator Gold Package, the next two cleverly named Navigator Gold Package B and the final two lines were not actually part of the package at all

	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jul 2023	Aug 2023	---	---	---	---	Total	Ratecard Price Variance %
☐	5497 Package ID: 1	The Navigator Website **Package: Navigator Gold Package** Size: Square Pop up (300 x 300), Skyscraper (120 x 600), Square Button (125 x 125) Section: _ALL_	Open CPM Rate		CPM	7/1/2023	8/31/2023	325.00	325.00	---	---	---	---	650.00	0.00%
☐	5498 Package ID: 1	The Navigator Times **Package: Navigator Gold Package** Size: 3x6 Section: Main Position: ROS Color: Full Color-CMYK (4C)	Color Display - Column Inch		PCOL	7/1/2023	7/1/2023	1,800.00	0.00	---	---	---	---	1,800.00	0.00%
☐	5499 Package ID: 1	Navigator Magazine **Package: Navigator Gold Package B** Size: 1/2 Page (H) (Mag) (7.375 x 4.875) Section: _ALL_ Position: RHP Color: Full Color-CMYK (4C)	1/2 Page (H) (Mag)		PMOD	7/1/2023	7/1/2023	8,000.00	0.00	---	---	---	---	8,000.00	0.00%
☐	5500 Package ID: 1	The Navigator Mobile App **Package: Navigator Gold Package B** Size: Medium Rectangle (300 x 250) Section: NEWS Position: ROS	Medium Rectangle - CPM		CPM	7/1/2023	7/30/2023	405.00	0.00	---	---	---	---	405.00	0.00%
☐	5501	Navigator Magazine Section: _ALL_ Position: ROB Color: Full Color-CMYK (4C)	Full Page (Mag)		PMOD	7/1/2023	7/1/2023	12,240.00	0.00	---	---	---	---	12,240.00	0.00%
☐	5502	Navigator E-Newsletter Size: LeaderBoard (728 x 90) Section: _ALL_ Position: BOT	LeaderBoard		CPD	7/4/2023	7/4/2023	2,000.00	0.00	---	---	---	---	2,000.00	0.00%

On the proposal, if you choose to implement the new tags that are available, you will be able to see this broken out by package as follows:

Package Details

Description		Qty	Start Date	Price
Navigator Gold Package	1	7/1/2023		2,450.00
Package Component Detail		Qty	Start Date	
Open CPM Rate		50,000	7/1/2023	
Color Display - Column Inch		18	7/1/2023	
Navigator Gold Package B	1	7/1/2023		8,405.00
Package Component Detail		Qty	Start Date	
Medium Rectangle - CPM		45,000	7/1/2023	
1/2 Page (H) (Mag)		1	7/1/2023	
LeaderBoard	1	7/4/2023		2,000.00
Full Page (Mag)	1	7/1/2023		12,240.00

If the above example, I have chosen not to use pricing on the detailed lines, and only display it on the package header row. That is entirely optional - you CAN put the prices on the detail lines if desired.

For your convenience, below is an example template that is using package groupings instead of the regular method. Performance and Flexible samples follow:

27KB PackageGroupingConfirmation_performance.txt

23KB PackageGroupingConfirmation_flexible.txt

When running Advertising Billing, the same groupings will be supported. Again, example templates are below:

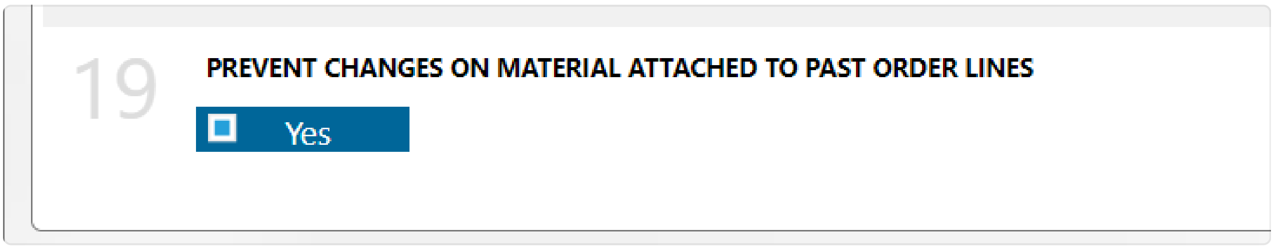
28KB Package_Performance_Invoice.txt

31KB Package_Flexible_Invoice.txt

Group Security Changes

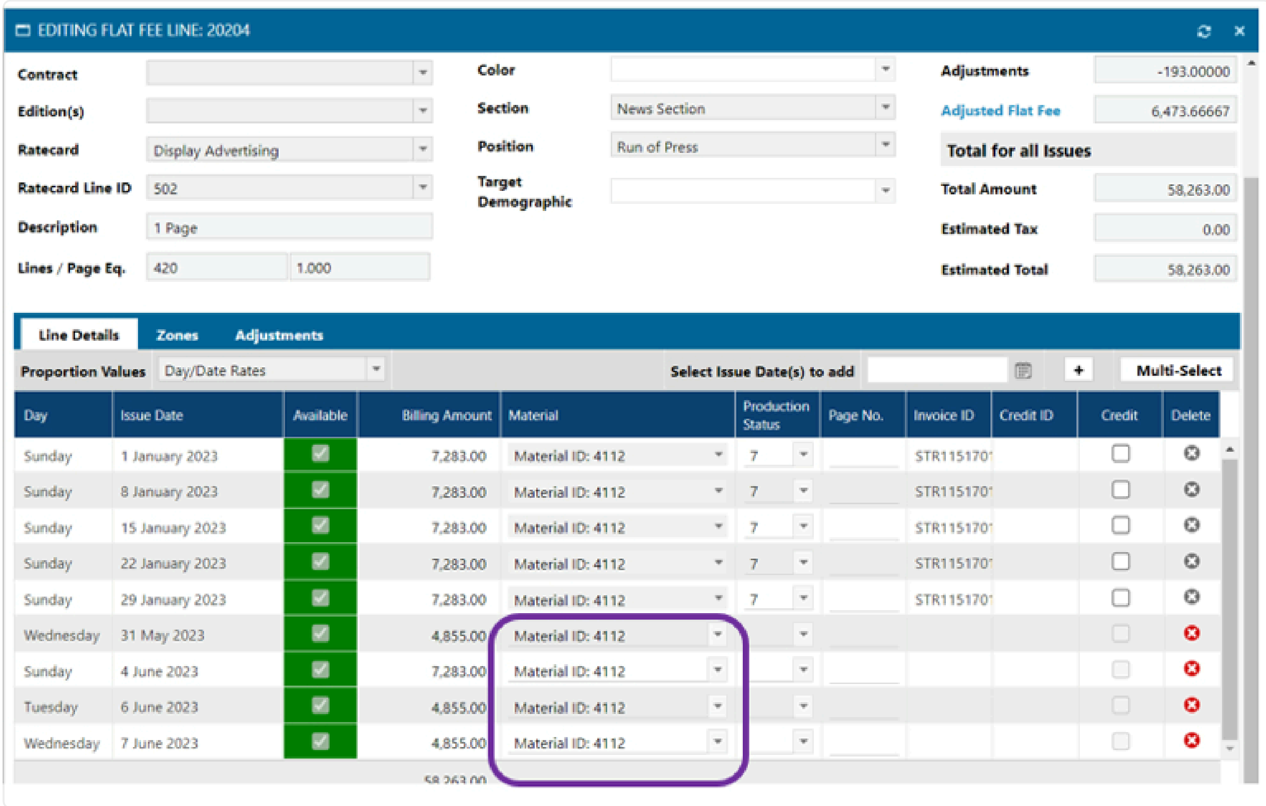
Line Item Security

There is a new setting on Advertising Group Security for Campaign Line Item Security - Prevent Changes on Material attached to Past Order Lines

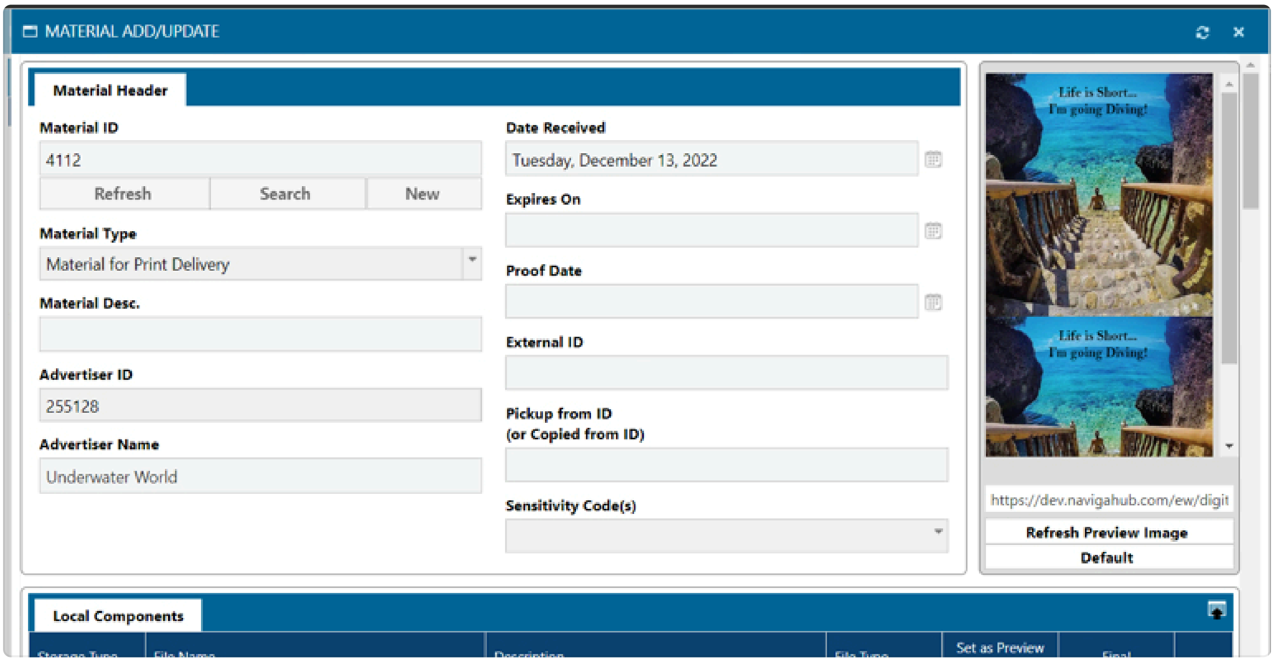


By default, this will be set to no, and campaign lines will behave as they always have. For any user groups you set this as "yes" - the user will no longer be able to change material assignments for insertions with publishing dates before today.

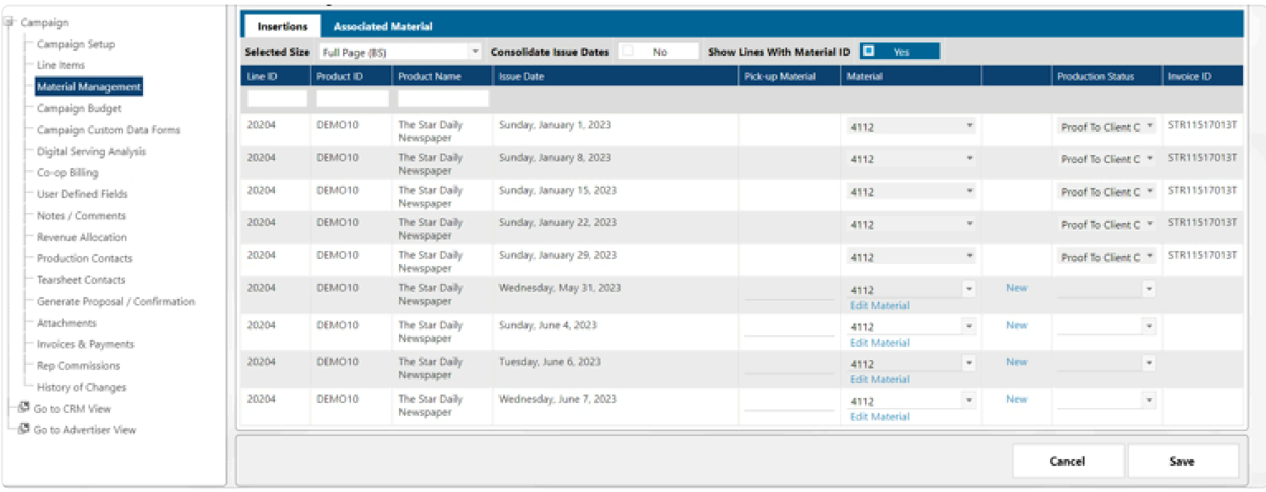
It is subtle in the screenshot, but the circled lines below are in the future and the dropdown is still selectable. In the January dates, these fields are grayed out and cannot be edited because they are in the past



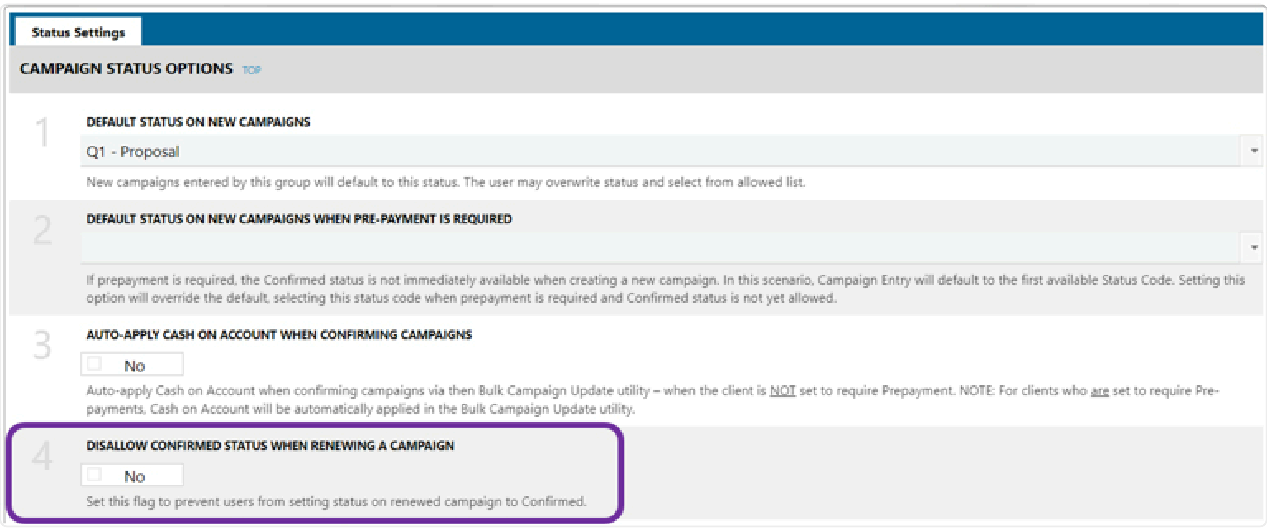
On the material itself, the material is also not editable by this user group - these lines are grayed out and not editable. Furthermore, at the bottom of the screen, there is no save button, so the order cannot be saved either.



It is a bit more obvious on the material management screen - the January lines are not editable but the future ones are (screenshot taken 5/18/23). Note, if i click Edit Material here, I still won't be able to save any edits since that material was used on past issue dates. If I truly wish to do a pickup with change, I can create a copy of the previous material and edit for future use. Any material with a run date in the past will be prevented from change unless the user is allowed (with "Prevent Changes on Material attached to Past Order Lines" set to No.)



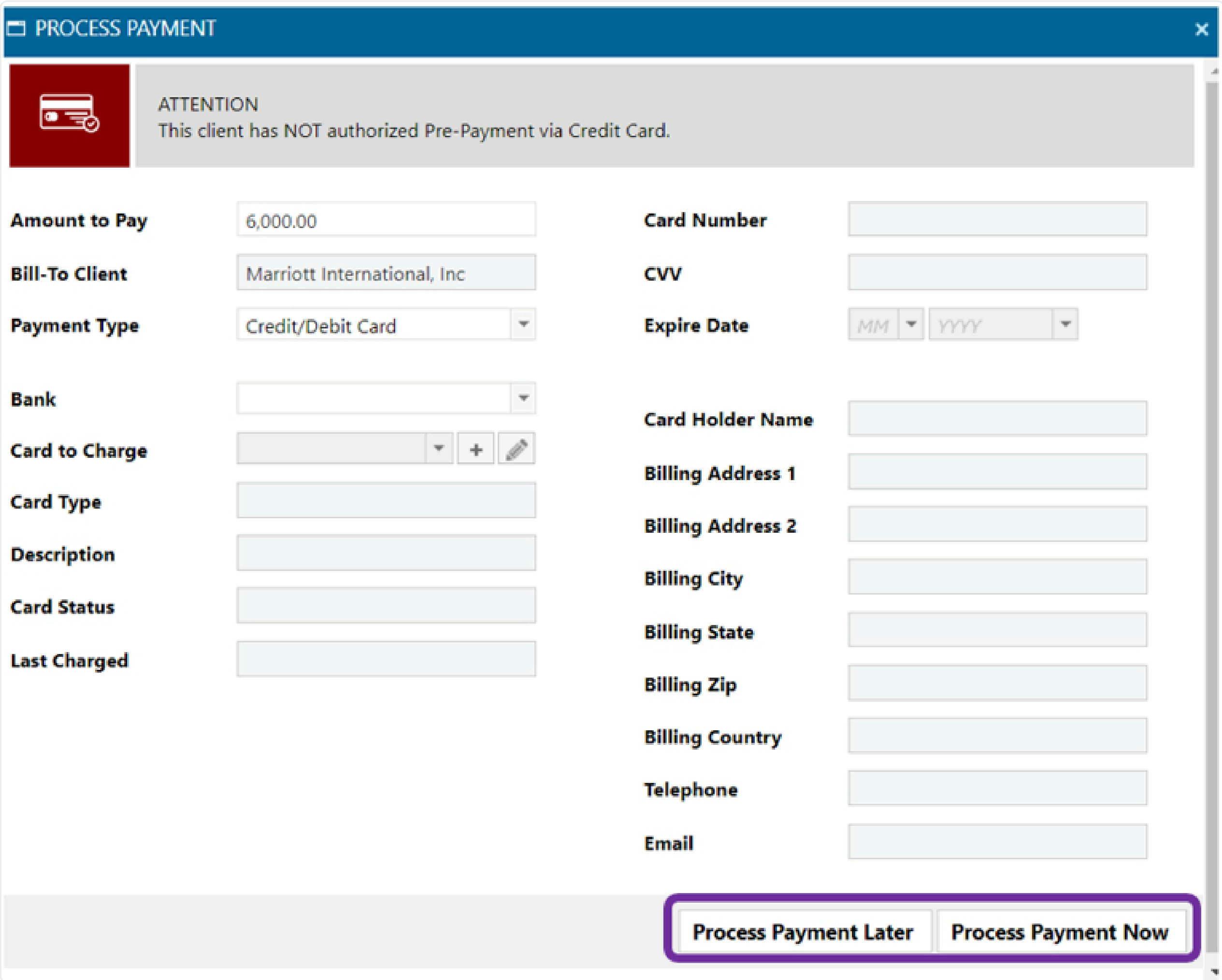
Status Code Security



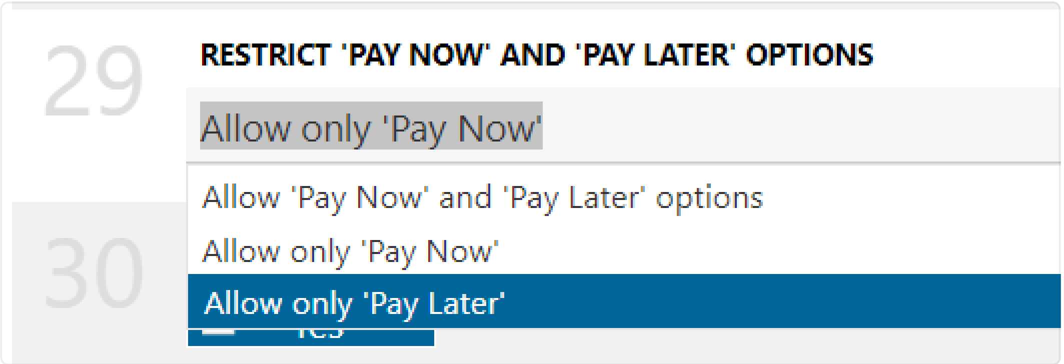
New option to **Disallow Confirmed Status when renewing a campaign** - This flag will prevent certain users from being able to select "confirmed" status during campaign renewal. The reason you might want to set this status to "yes" is that the renewal process simply copies the lines on the campaign for future dates. It doesn't do all the sophisticated inventory checking that would normally be done in Full line entry or quick line entry. So preventing the user from setting the status as confirmed will allow the inventory checking to be done separately before then manually updating (or via bulk update status screen) the status to confirmed.

Pay now and Pay Later options

Under campaign header Security in the Advertising Security section, there has been a change to option #29. In 2023.2, the option read "Set pay later option to false by default when entering a new credit card payment in the invoices & payments screen on a campaign." - and when we changed the credit card screen the flag was no longer there, and we gave the option to process payment now or process payment later and the user clicked a button each time. In 2023.2, the payment screen in order entry looked like this:



To allow for more flexibility/customization in 2023.3 we now give three choices instead of a simple yes/no flag. In 2023.3 you will see this in Group Security:

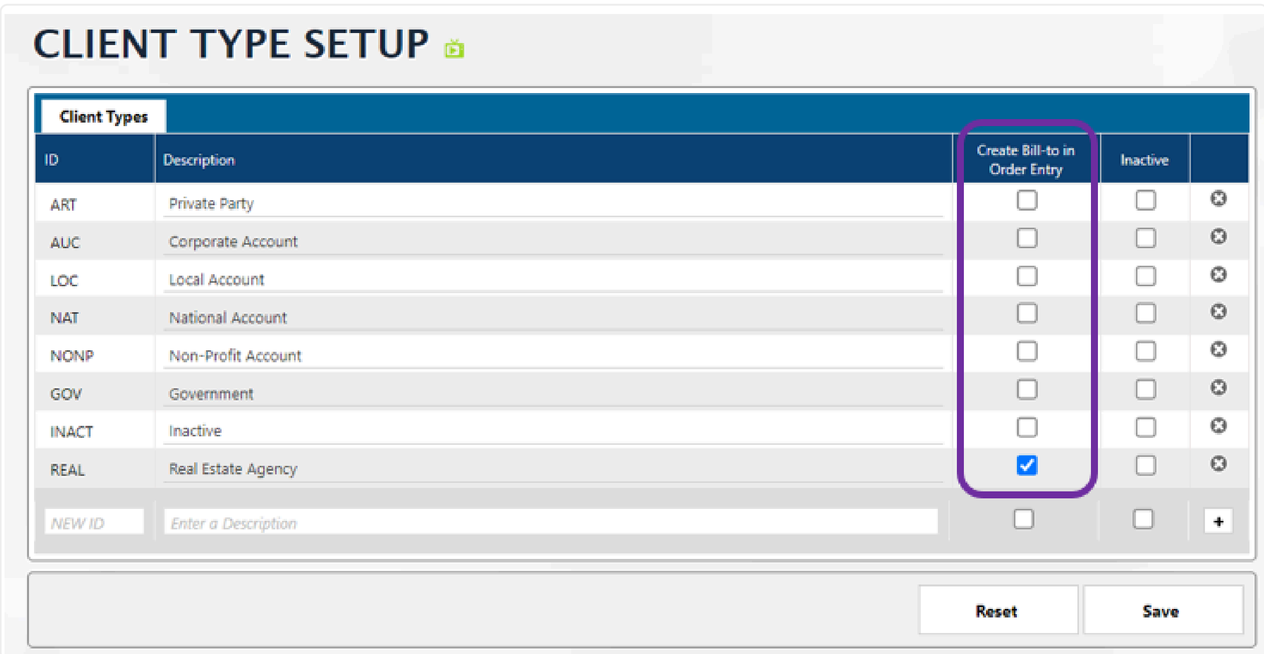


Then in order entry, you will see either both options, or just one, based on your group security.

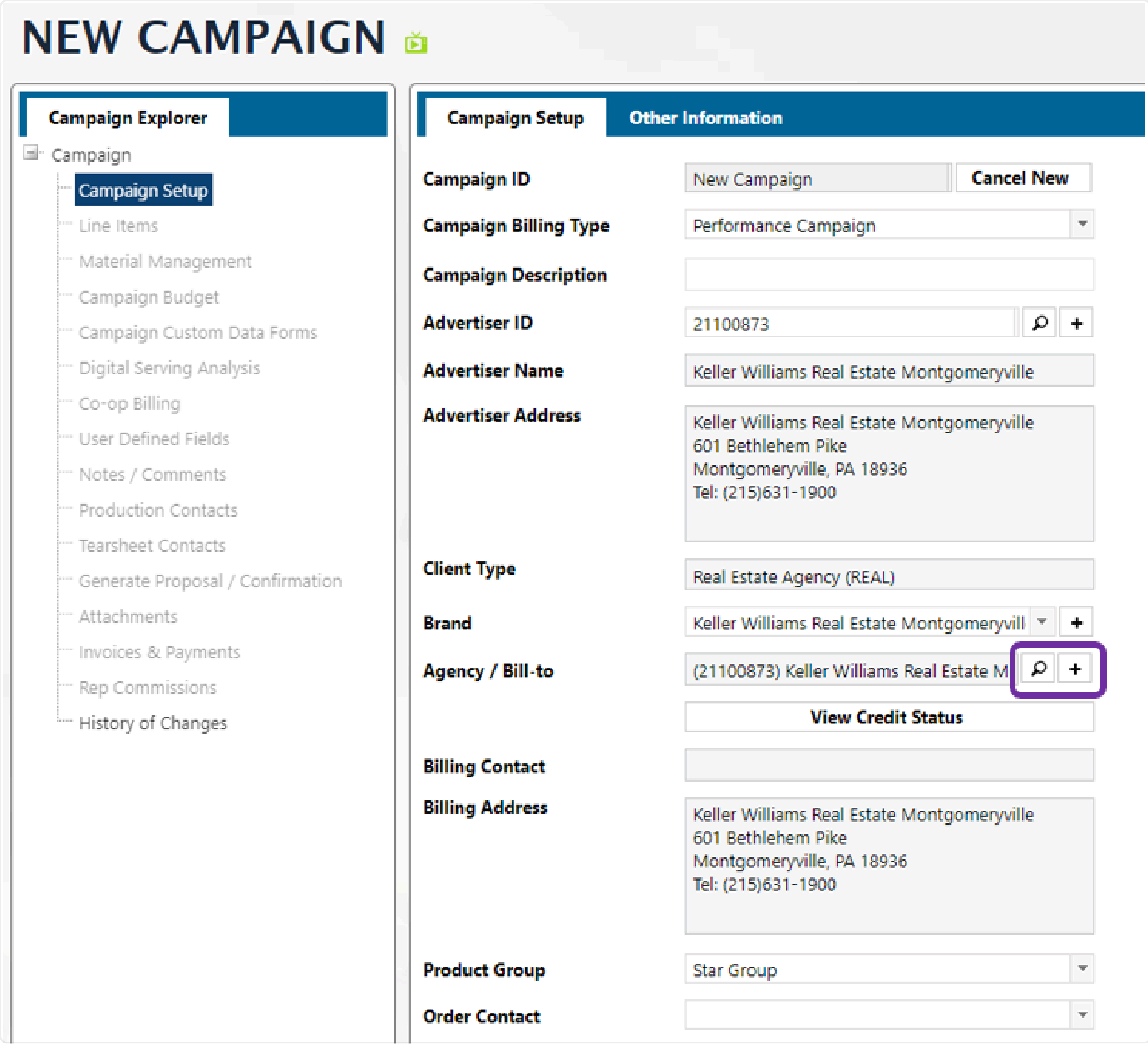
Flag on client type for allowing "Bill to" account creation

In one of our clients' markets it is common in Real Estate Advertising that the Real Estate Agent will place the order for advertising the home for sale, but the newspaper invoices the home owner directly for the ad.

To accomodate this workflow, there is a new flag on Client Type Setup:

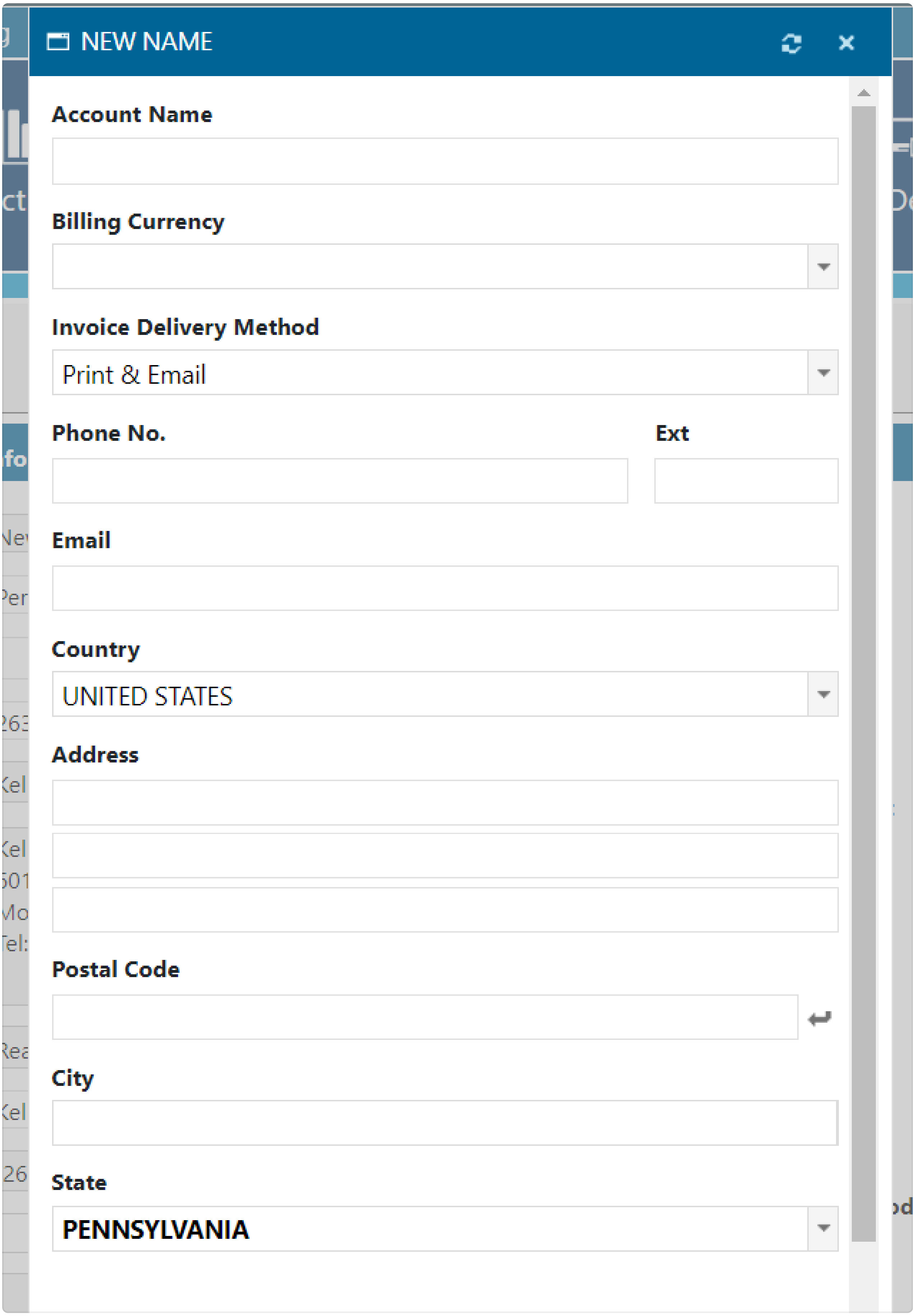


For any advertisers with a client type that has this new flag set, there will be a search and + sign next to the bill-to information in order entry:



Click on the magnifying glass to find a bill to account that already exists in the system, or click the plus to add a new bill-to.

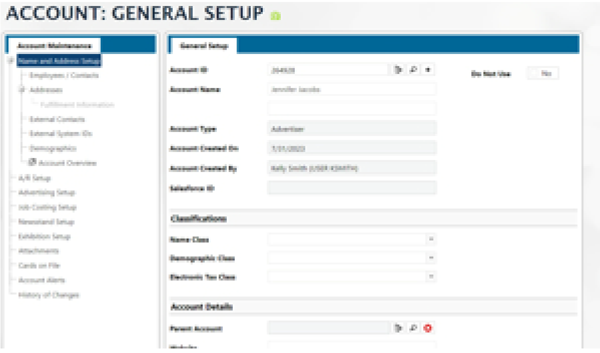
User will be prompted to enter account details below:


NEW NAME
Account Name
Billing Currency
Invoice Delivery Method
Print & Email
Phone No.
Ext
Email
Country
UNITED STATES
Address
Postal Code
City
State
PENNSYLVANIA

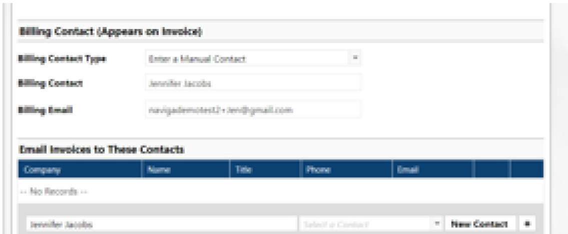
The Bill-to account will get it's credit terms and other defaults from the A/R System Setup. (A/R Module → Setup → Admin → A/R System Setup, Client Defaults section.)

Note that the Invoice Delivery Method is selected in here. If email is selected, the email address will be put in two places -

1. in the Name and Address setup node of the Name Maintenance Tree (Email Addresses section)



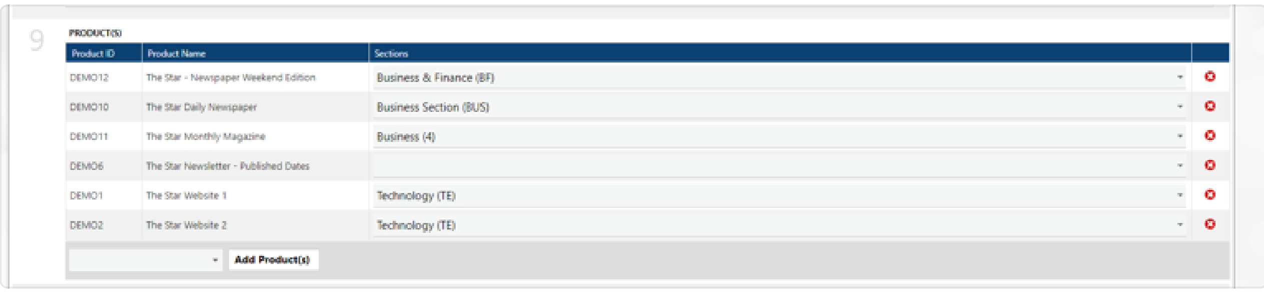
2. In the Advertising Setup node of the Name Maintenance Tree (Billing Contact (Appears on Invoice) section). It will be entered as a Manual Contact type since this is not an actual contact person that can be selected from the dropdown.



Incentives - Category and Sections

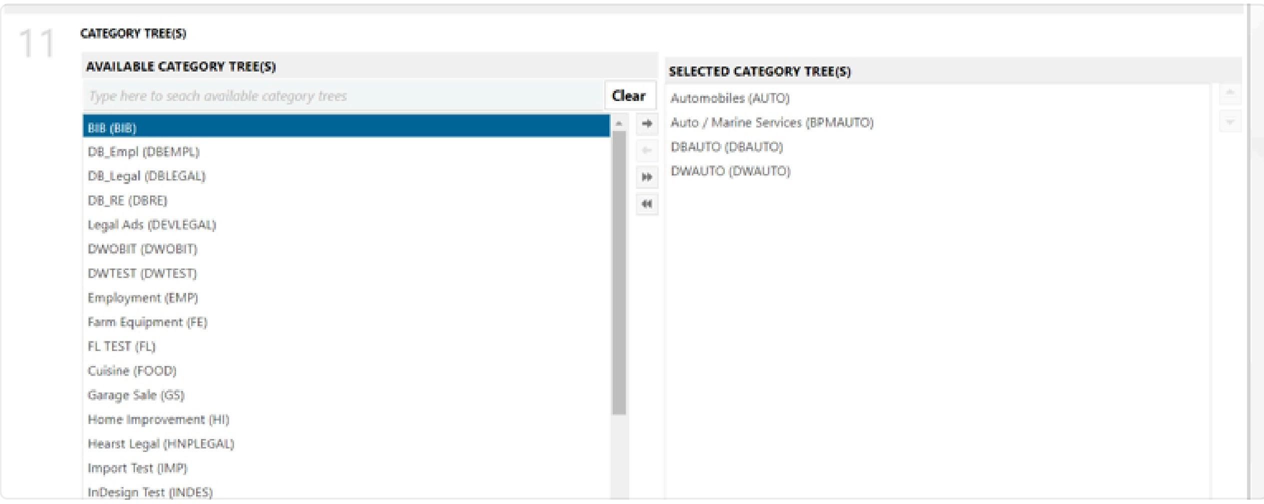
Incentives have been around for several versions now...since 2021.3!! For the 23.3 release, we have added the ability to offer specific incentives for certain categories or sections. You could always give incentives for certain products, ad types, formats, client types, or even specific clients - but now you can have different offers for say Automotive vs Real Estate or you can offer a different incentive for a special section that isn't offered in other sections.

The below example would be for an incentives in the Business Section -



This is an incentive that is offered for several products, but in each product, the sections are just a little different. In the first product in the list, the section is called "Business and Finance" while another product calls it simply "Business". The newsletter product doesn't have sections, so it is blank there. For any incentive that is allowed for multiple sections, the dropdown is a multi-select. If it is allowed for all sections, it can simply be left blank and it will be applicable to all.

Similar functionality is also included for Classified Categories:



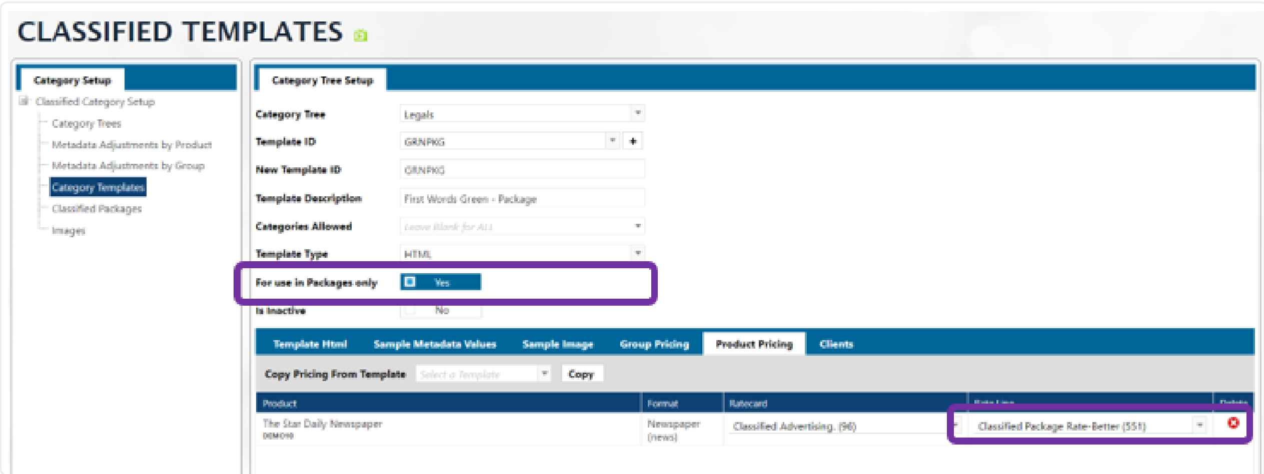
Select any allowed categories for the incentive and move them to the right column using the arrows between the columns. OR, simply leave the right column blank to allow the incentive for all categories.

Classified Package - multiple templates allowed

There is a new field on Classified packages ("Other optional templates") which works in conjunction with a new field on classified templates ("For use in packages only").

The use case for this is that you migth like to offer to your clients a special price for purchasing a specific bundle of products as a classified package. When setting up a FLAT FEE package the rate is selected on the package itself, so that is easy to do. When setting up a dynamically priced package, you could select a specific template for that package, which would contain the price, but if you wanted to offer multiple templates, that would mean multiple packages, and that template also would have been available to select outside the package as well. So these two new fields will alleviate that issue. Here are the setup steps and some screenshots...

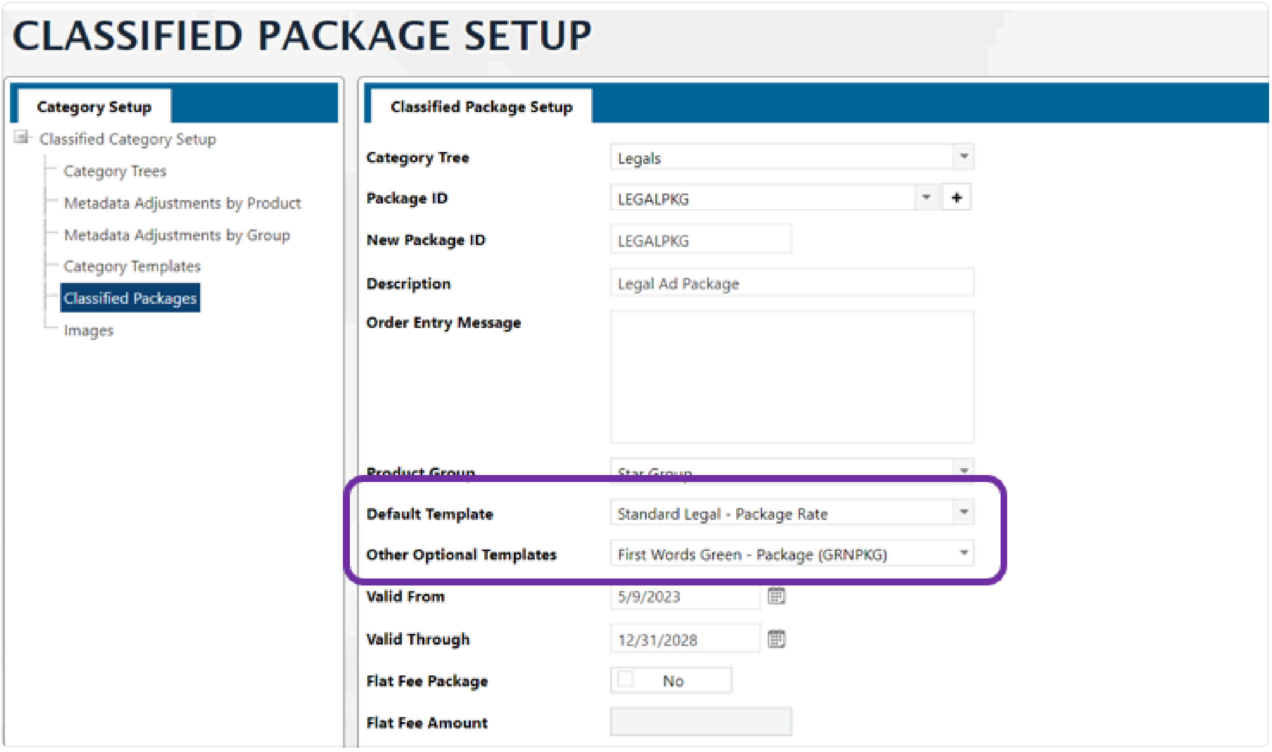
First, setup the templates that will be used for the package:



The actual styling might be the same or different than what is used for an item being booked without a package. The important part here is that the rate that gets linked is the package rate. and the flag at the top for packages only will ensure that this template cannot be selected without the package.

Create as many templates as you would like for the package.

Then, create the package itself:

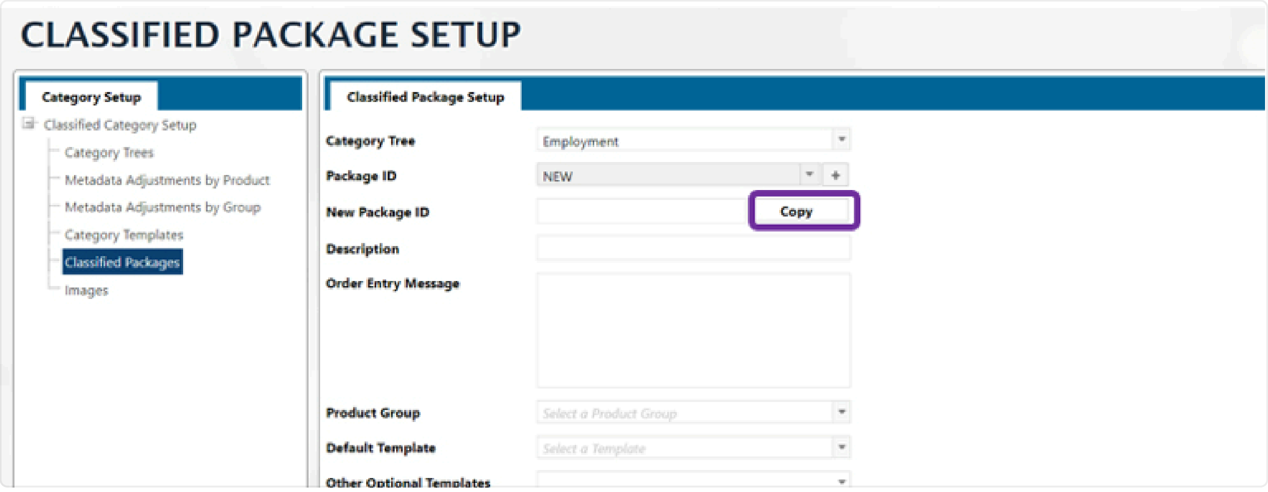


The template(s) that were just selected can now be selected here in the Default template and Other optional templates fields.

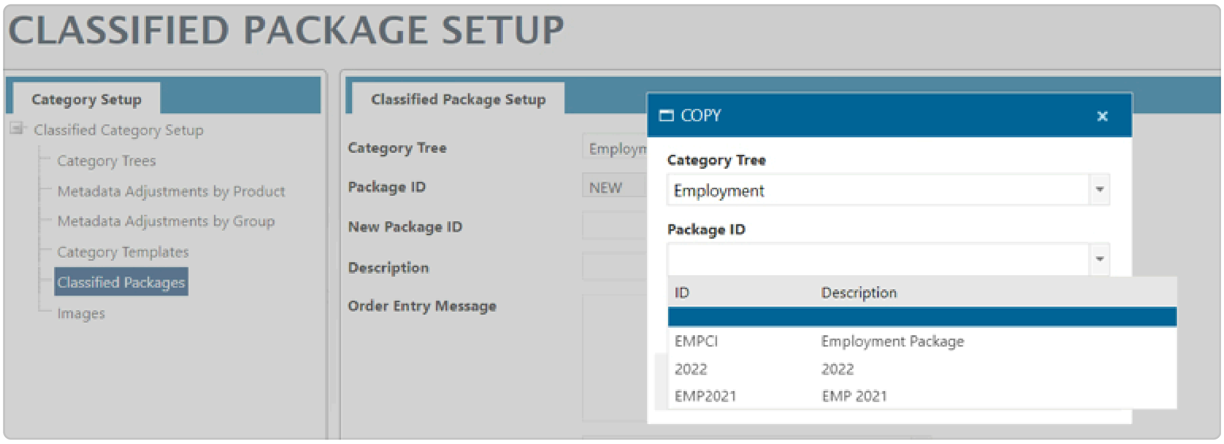
> Important note for those using classified self-service. The new "other optional templates" field will be ignored by the self-service portal and it will continue to work as it does today where the package that the user selects will dictate the template that is used for the ad. Self-Service uses the template selected in the "Default Template" field.

Classified Package - Copying

When creating a new Classified Package, there is a new option to copy an existing package. This will save some setup time when creating similar packages.



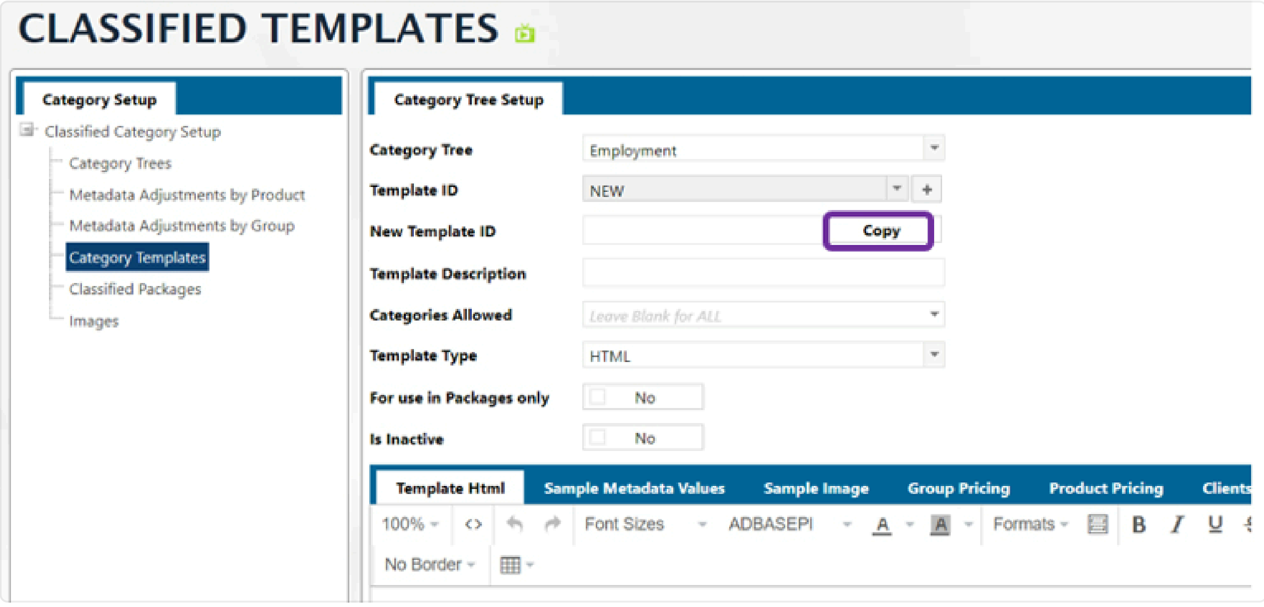
1. Navigate to Setup → Classified Order Setup → Classified Package Setup
2. Click the + to create a new package
3. Select the Copy button
4. a Copy dialog box will open
5. Select the tree and package you are copying from, and then click Copy



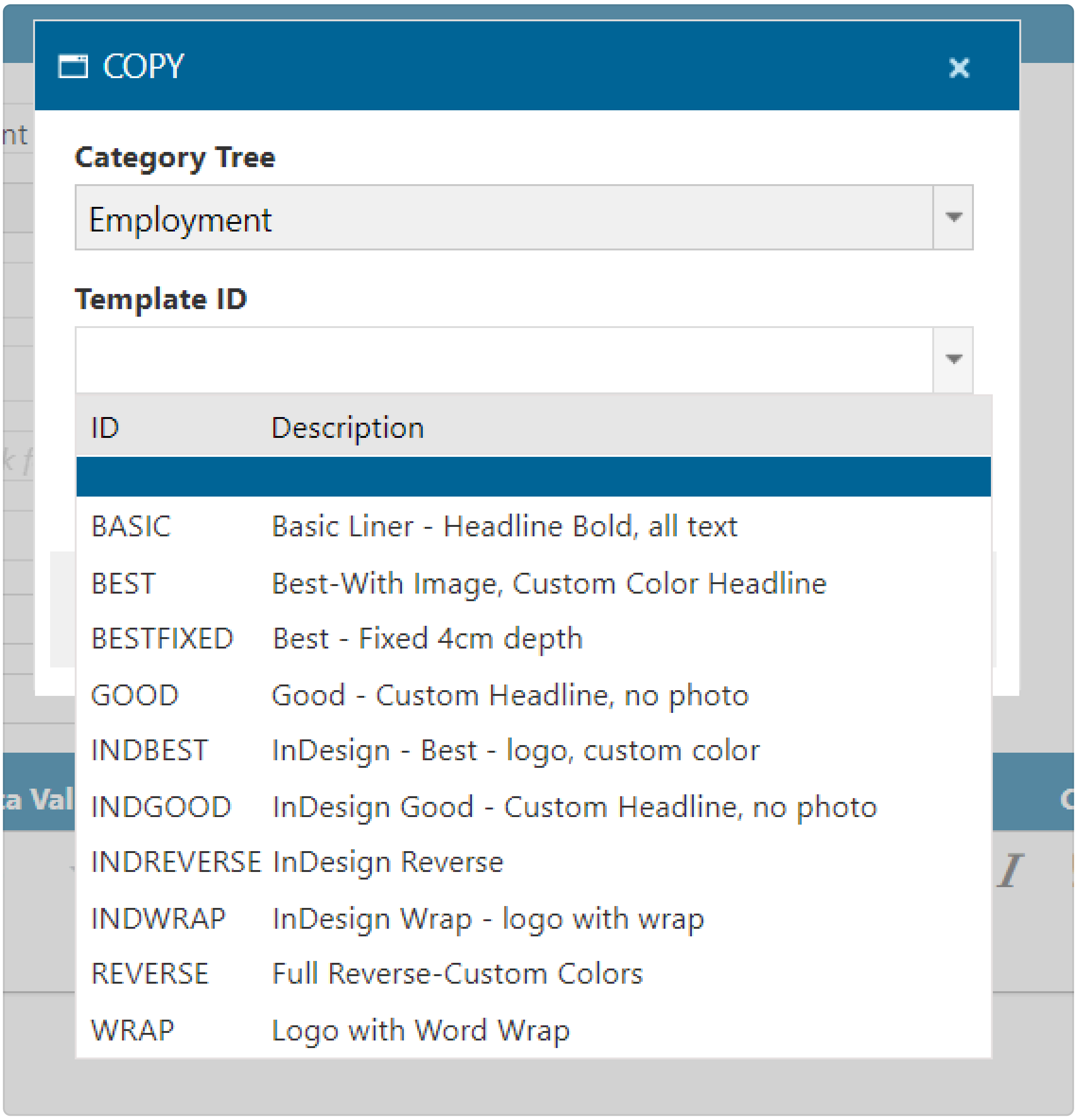
6. Close the window
7. Enter a new ID for the new package
8. Modify other details as needed for the new package
9. Select Save at the bottom of the screen

Classified Templates - Copying

When creating a new Classified Template, there is a new option to copy an existing template of the same category. This will save some setup time when creating similar templates. Unlike Packages, this one has elements (like Metadata tags) that are really specific to the category that it is related to, so we don't allow copying across categories, but can still be a timesaver when creating additional templates within a category.



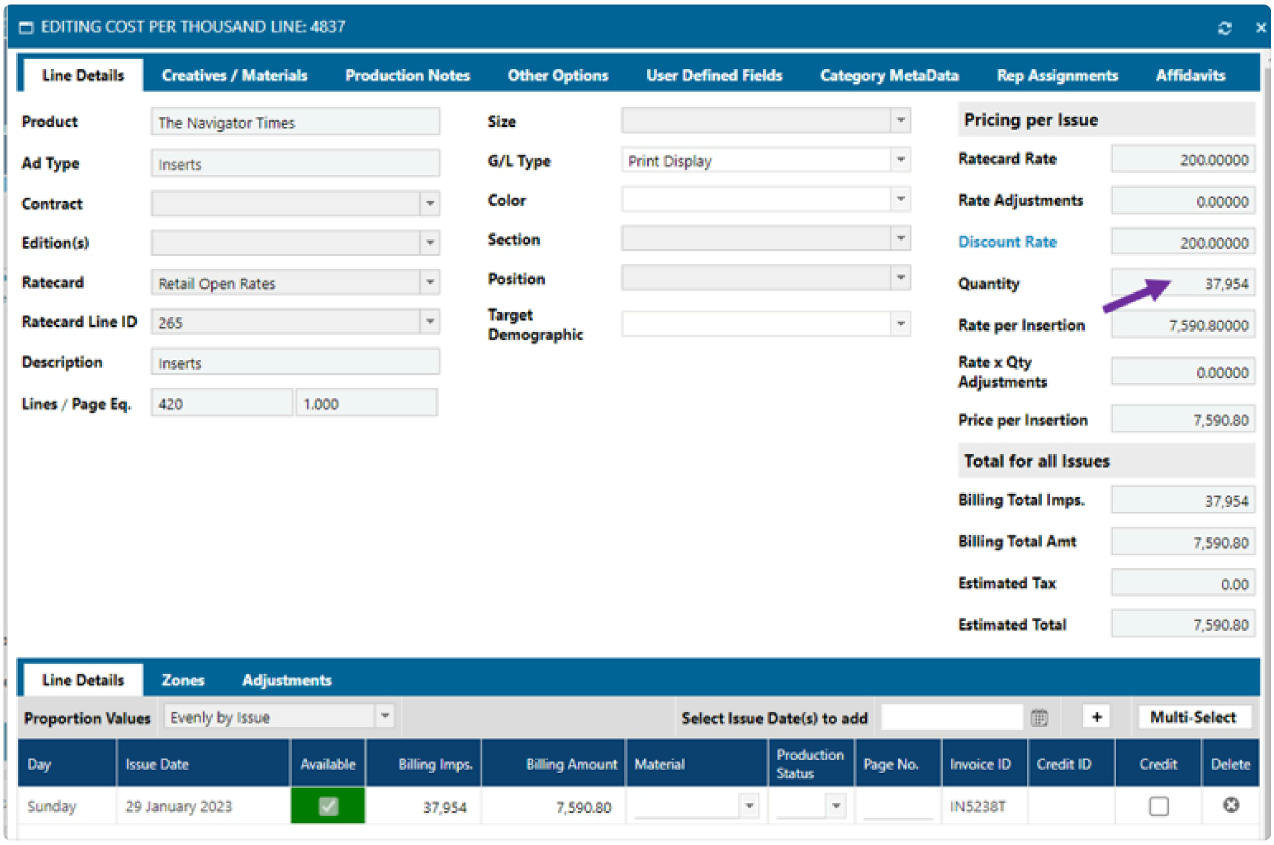
1. Navigate to Setup → Classified Order Setup → Classified Category Template Setup
2. Click the + to create a new template
3. Select the Copy button
4. Copy dialog box will open
5. Select the template you are copying from, and then click Copy

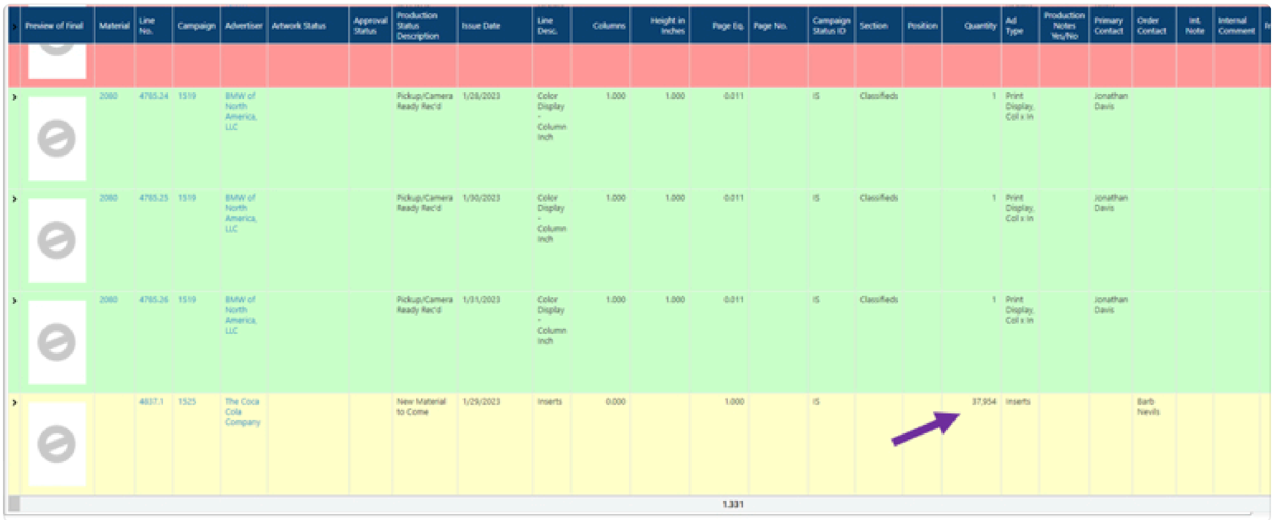


6. Close the window
7. Enter a new ID for the new Template
8. Modify other details as needed for the new template - perhaps there are different rates for this one, or perhaps the HTML is slightly different than the original one.
9. Select Save at the bottom of the screen

New field added to Production Reports

In the Production by Print Product, Production by Sales Rep, and Production by Product Group reports, the Quantity field has been added. This field is primarily used for CPU and CPM type ads (Inserts).



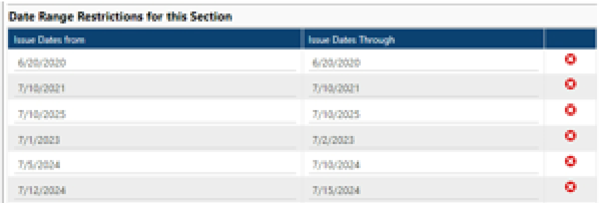


While it is new for 2023.3, it was also patched back to 2023.2, so you will also find it in that release.

New fields added to Section Import

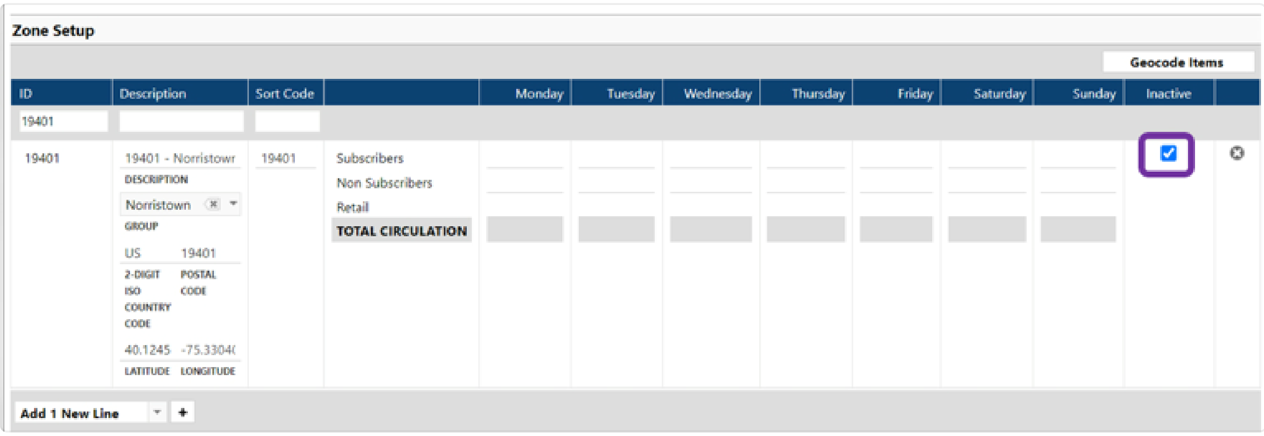
The following fields were added to the section import template.

<table>
<tr><td>Restriction Start Dates</td><td>This is optional. If used, dates will append to any dates already on the section. Separate lines by semi-colons. This field imports into the first field in this grid.

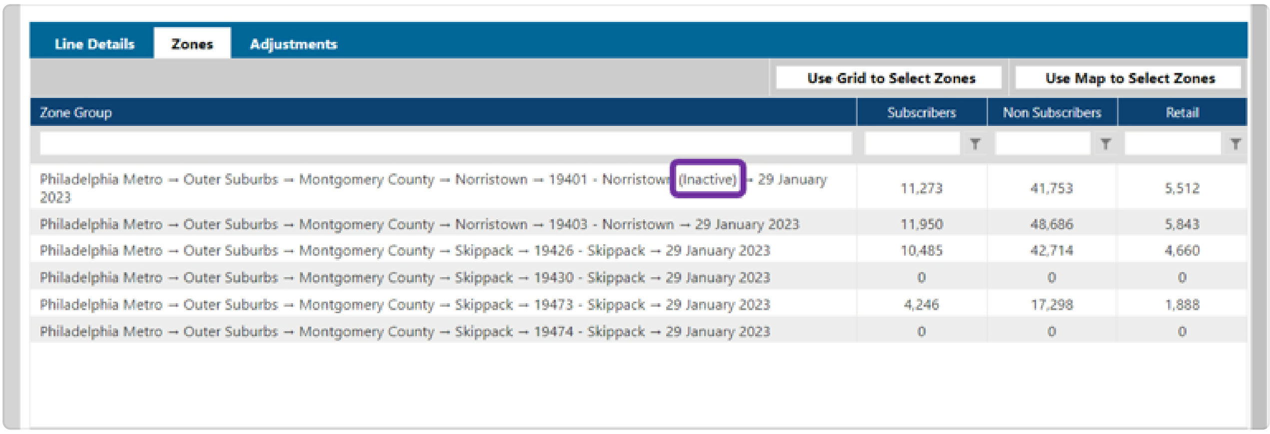
Date Range Restrictions for this Section<table><tr><th>Issue Dates from</th><th>Issue Dates Through</th></tr><tr><td>6/20/2020</td><td>6/20/2020</td></tr><tr><td>7/10/2021</td><td>7/10/2021</td></tr><tr><td>7/10/2025</td><td>7/10/2025</td></tr><tr><td>7/1/2023</td><td>7/2/2023</td></tr></table>For example, if I was updating the above section to include several date ranges for 2024, I might enter in 7/5/2024;7/12/2024.</td></tr>
<tr><td>Restriction End Dates</td><td>This is optional. If used, dates will append to any dates already on the section. Separate lines by semi-colons. This field imports into the second field in this grid. For example, if I was updating the above section to include several date ranges for 2024, I might enter in 7/10/2024;7/15/2024
This would be the "after" if I entered these two start dates and end dates:

Date Range Restrictions for this Section<table><tr><th>Issue Dates from</th><th>Issue Dates Through</th></tr><tr><td>6/20/2020</td><td>6/20/2020</td></tr><tr><td>7/10/2021</td><td>7/10/2021</td></tr><tr><td>7/10/2025</td><td>7/10/2025</td></tr><tr><td>7/1/2023</td><td>7/2/2023</td></tr><tr><td>7/5/2024</td><td>7/10/2024</td></tr><tr><td>7/12/2024</td><td>7/15/2024</td></tr></table></td></tr>
<tr><td>Published Day(s)</td><td>This is optional. If you limit this section to only certain days of the week, enter valid days of week here. If multiple, separate by semi-colons. Valid values are MO;TU;WE;TH;FR;SA;SU.
If published every day, this field can be blank.</td></tr>
<tr><td>Override Layout ID</td><td>This is optional, but if used must match a Layout ID setup in Layout Maintenance. (Setup -> Advertising Setup → Coumn Layout Maintenance)</td></tr>
</table>

New Flag to mark Preprint/Insert Zones as Inactive

There is a new flag on Zone setup to mark individual zones as inactive. This can be found in the Advertising Module → Setup → Product Setup → Zone Setup



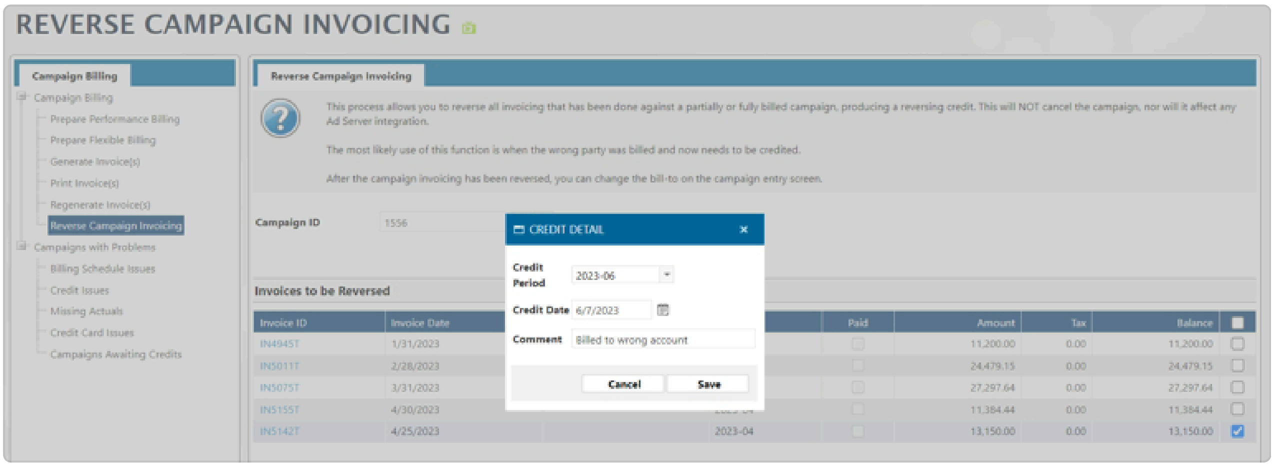
For orders that have already been created while the Zone was active, the order will not be modified. If you open the order, you will see that it is now inactive, and new orders will not have the option to select that Zone anymore.



Any FUTURE orders that were already booked using that Zone will need to manually be edited to have the Zone removed if the delivery will not be done to the Zone anymore.

☑️ Reverse Campaign Billing Comment

When doing the function to reverse campaign billing there is now a comment field where you can add comments.



This will be displayed in the #COMMENT# tag on the invoice


naviga

Invoice No.	IN5275T
Campaign No.	1556
Description	Print Ads 2023 H1
Invoice Date	6/7/2023
P.O. Number	
Sales Rep(s)	Chloe Closer

CANCELLATION

bill-to

BMW of North America, LLC
ATTN:
300 Chestnut Ridge Road
WESTWOOD, NJ 7677
UNITED STATES
Account No: 100057

advertiser

BMW of North America, LLC
Local Dealership
300 Chestnut Ridge Road
WESTWOOD, NJ 7677
UNITED STATES
Account No: 100057

please remit payment to

Naviga
7900 International Drive
Suite 800
Bloomington, MN 55425 USA

Questions? Call us at 310.555.1234

payment due

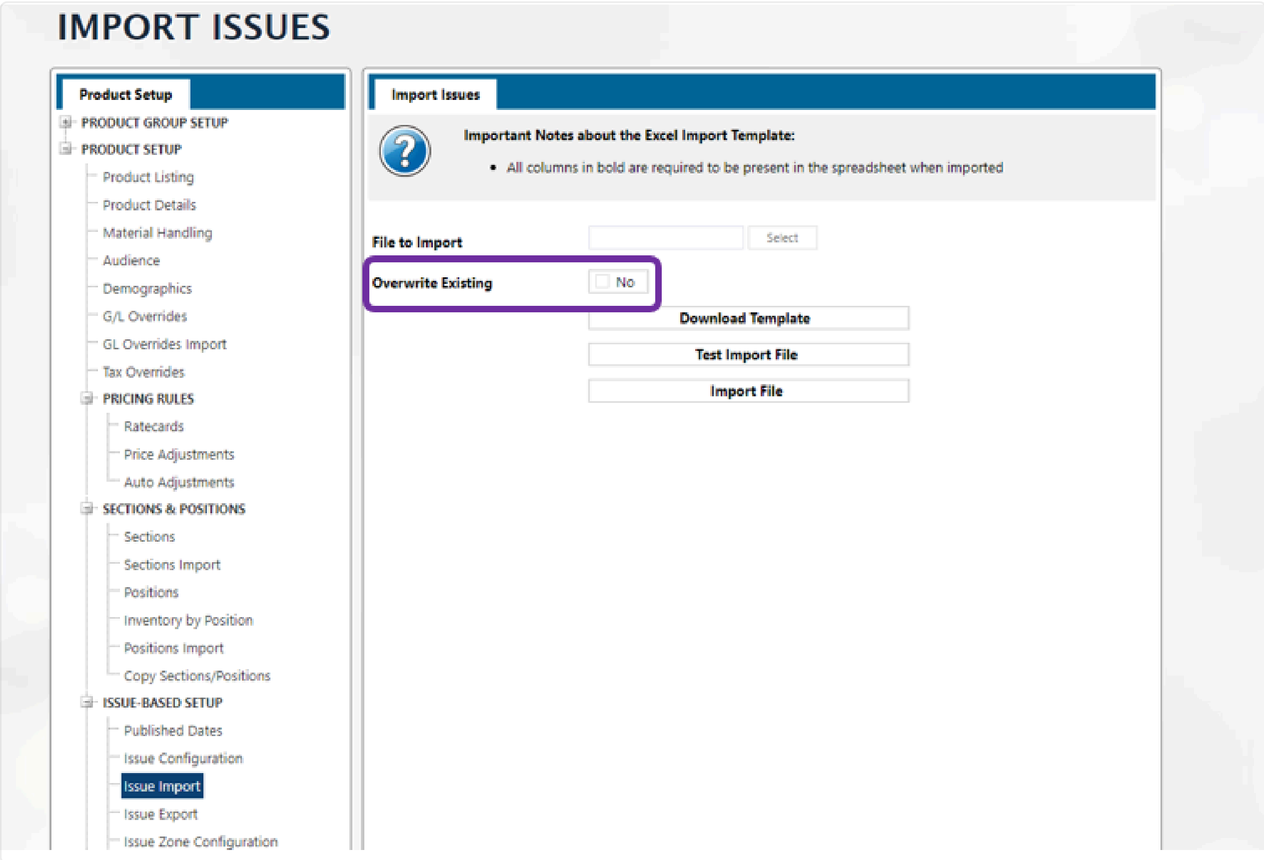
Currency	**US Dollar**
Gross Amount	**-13,150.00**
Agency Commission	**0.00**
Net Amount	**-13,150.00**
Pre-Paid Amount	**0.00**
Payment Amount Due	**$ -13,150.00**
Payment Due Date	

Billed to wrong account

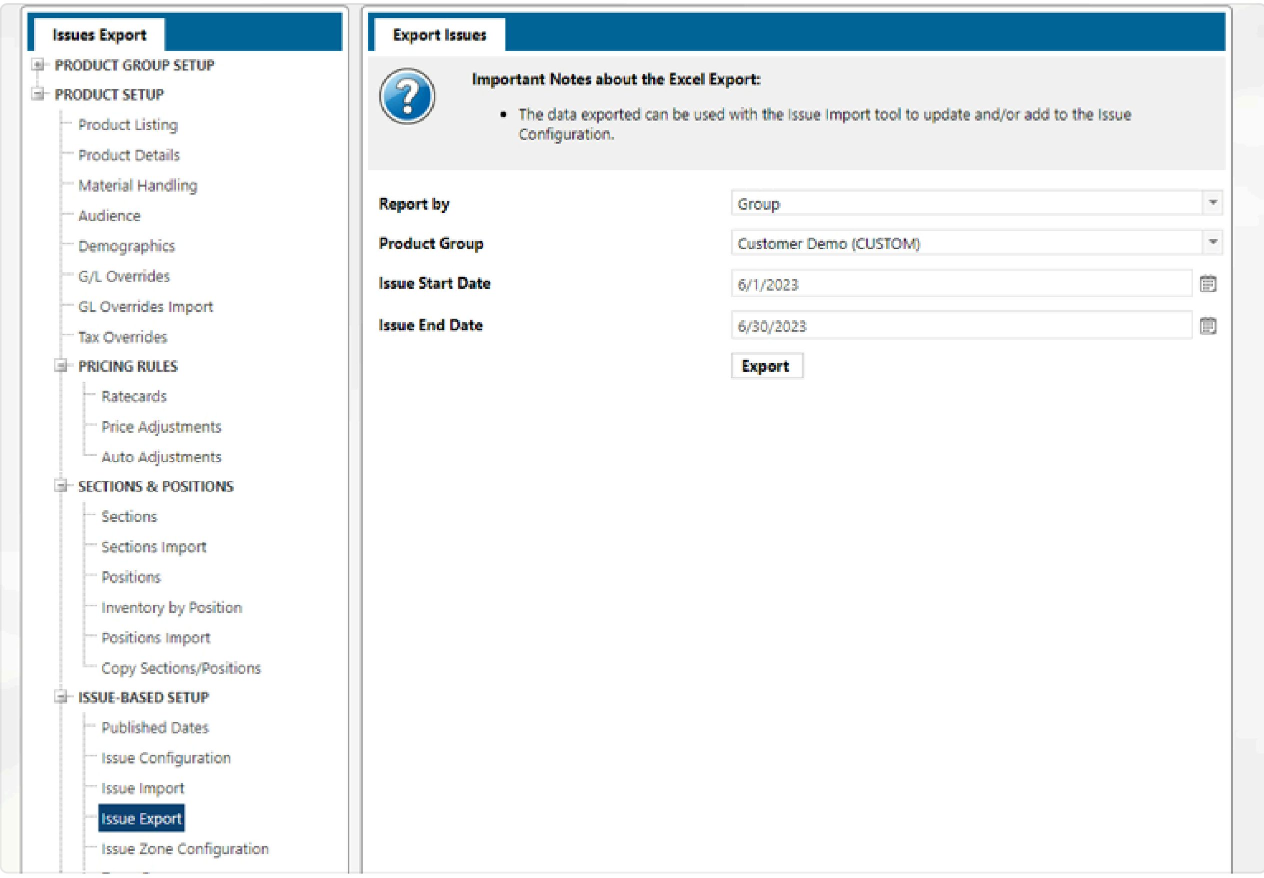
☑ Easily Update Issue Configurations

This one will be a time saver for many. It is not uncommon that orders will need to be booked for future issues when management hasn't yet finalized the budget numbers for an issue. Now you can create the issues without the budget information and then update it later with an overwrite import. Previously, any missing data would need to be entered manually, which can be very time consuming, especially for our larger clients.

Previously, the issue import could be used to create new issues, but not to update existing. New in this release is a flag to Overwrite Existing issues on the Issue Import screen:



In Addition, there is also an Issue Export available now too:

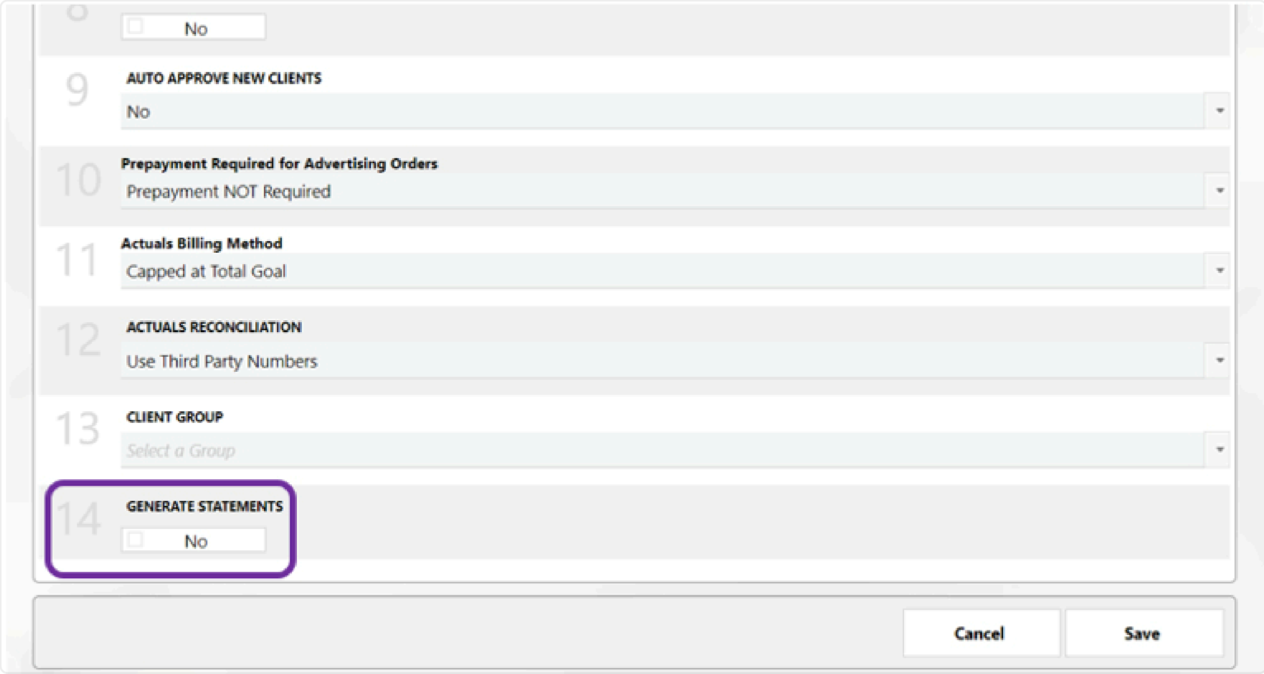


Just below the Issue Import in Product Setup is a new screen for Issue Export. To Export the configuration,

1. Select to export a single product, or a Product Group
2. Select the Product or Product Group to export
3. Select the Date Range to Export
4. Click the export button
5. This will download an excel spreadsheet to your downloads folder which can be opened and modified as needed. The downloaded spreadsheet will be in the format needed to then upload via the Issue Import process.

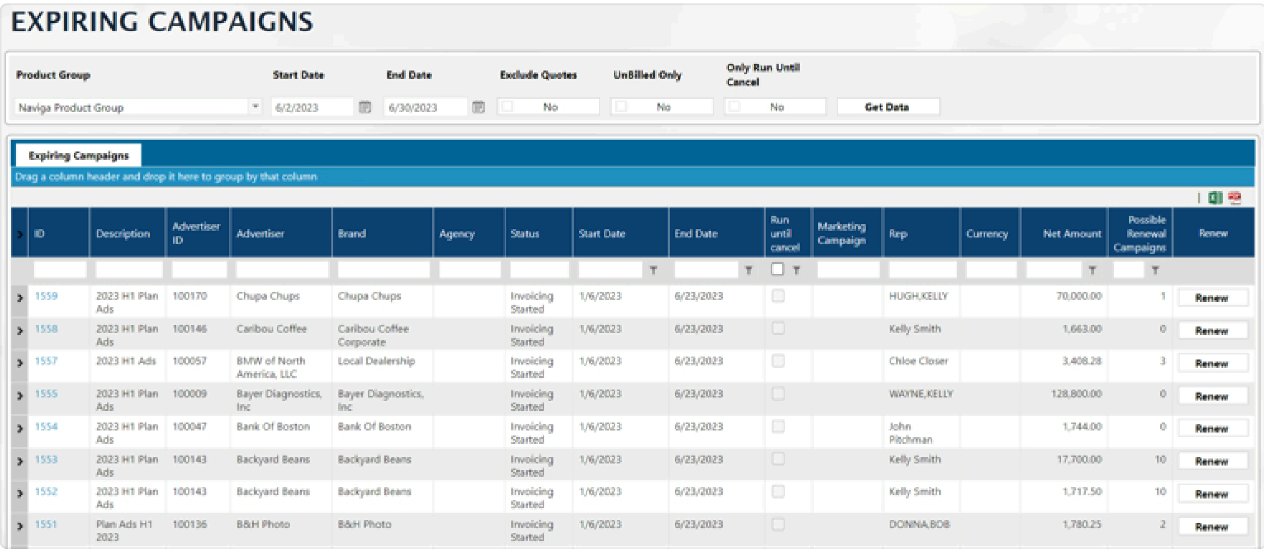
Client Type Defaults - New Option

There is a new flag on the Advertising Client Type Defaults - A yes/no flag to generate statements. This same flag is also on the A/R System Setup as well, in the client defaults section. If



New Field on Expiring Campaigns Report

The "Marketing Campaign" field was added to the Expiring Campaigns report. It was an important field for one of our clients to be able to see and filter on when running this report.

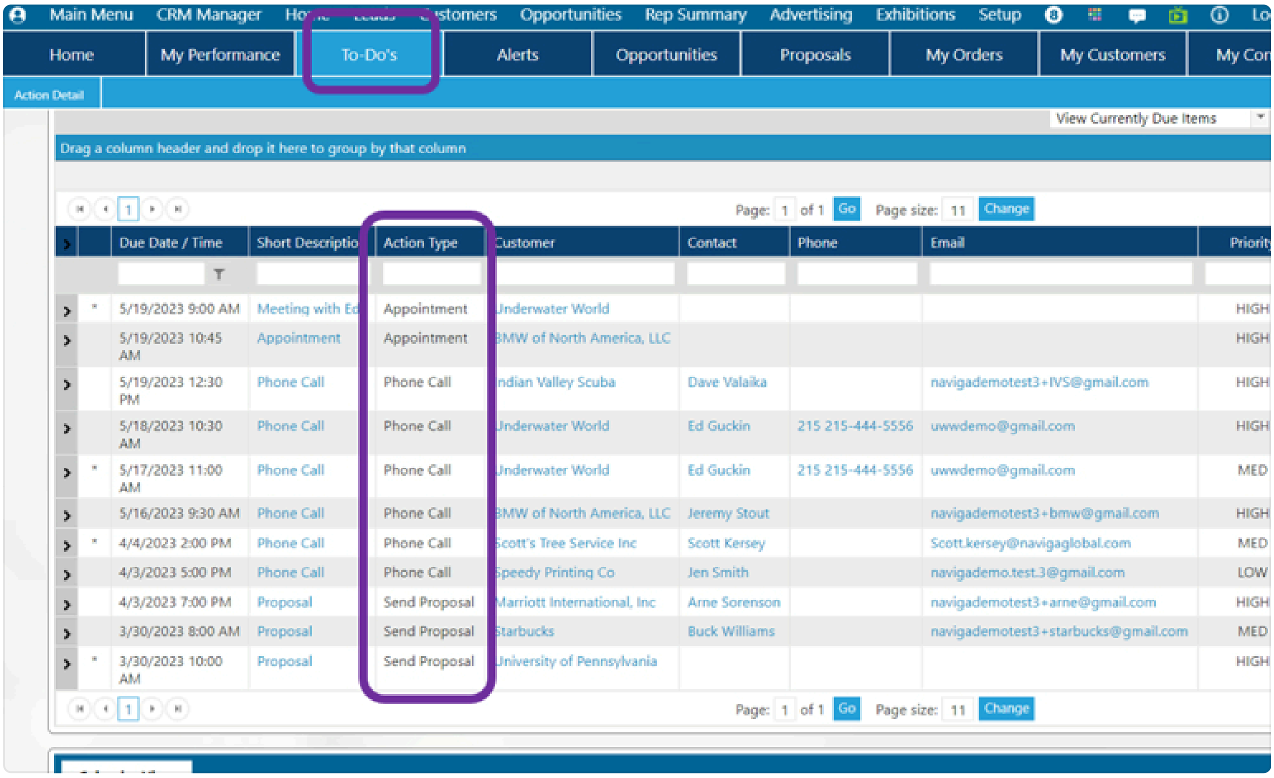


ID	Description	Advertiser ID	Advertiser	Brand	Agency	Status	Start Date	End Date	Run until cancel	Marketing Campaign	Rep	Currency	Net Amount	Possible Renewal Campaigns	Renew
1559	2023 H1 Plan Ads	100170	Chupa Chups	Chupa Chups		Invoicing Started	1/6/2023	6/23/2023			HUGH,KELLY		70,000.00	1	Renew
1558	2023 H1 Plan Ads	100146	Caribou Coffee	Caribou Coffee Corporate		Invoicing Started	1/6/2023	6/23/2023			Kelly Smith		1,663.00	0	Renew
1557	2023 H1 Ads	100057	BMW of North America, LLC	Local Dealership		Invoicing Started	1/6/2023	6/23/2023			Chloe Closer		3,408.28	3	Renew
1555	2023 H1 Plan Ads	100009	Bayer Diagnostics, Inc	Bayer Diagnostics, Inc		Invoicing Started	1/6/2023	6/23/2023			WAYNE,KELLY		128,800.00	0	Renew
1554	2023 H1 Plan Ads	100047	Bank Of Boston	Bank Of Boston		Invoicing Started	1/6/2023	6/23/2023			John Pitchman		1,744.00	0	Renew
1553	2023 H1 Plan Ads	100143	Backyard Beans	Backyard Beans		Invoicing Started	1/6/2023	6/23/2023			Kelly Smith		17,700.00	10	Renew
1552	2023 H1 Plan Ads	100143	Backyard Beans	Backyard Beans		Invoicing Started	1/6/2023	6/23/2023			Kelly Smith		1,717.50	10	Renew
1551	Plan Ads H1 2023	100136	B&H Photo	B&H Photo		Invoicing Started	1/6/2023	6/23/2023			DONNA,BOB		1,780.25	2	Renew

CRM Module

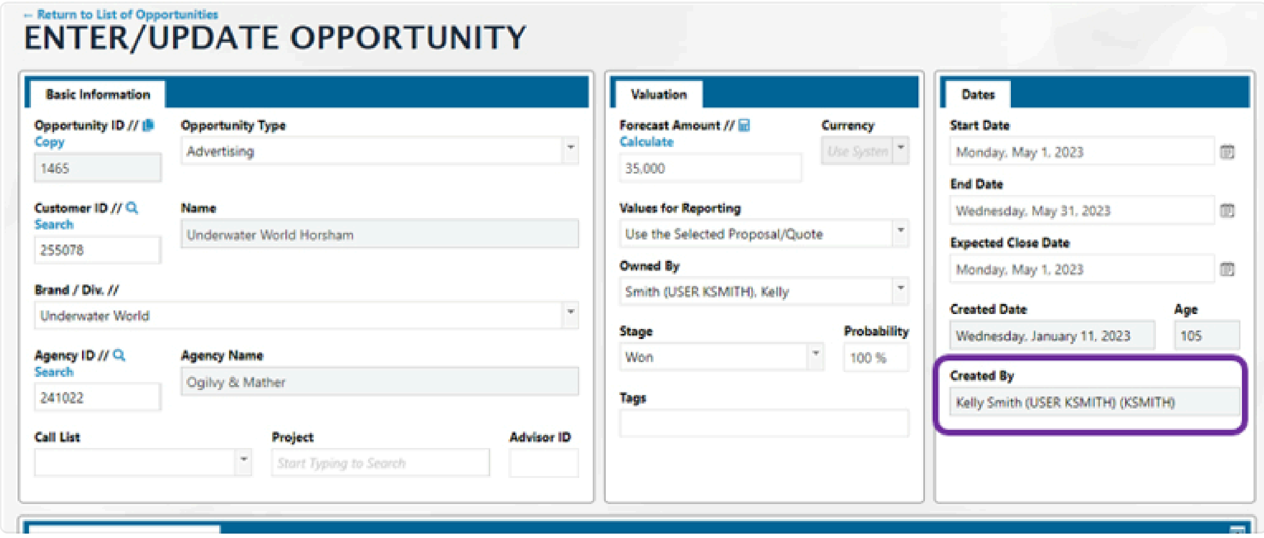
Action Type added to To Do's screen

On the to-do's screen we have added a new field in the grid for "Action Type" As a CRM Rep, click on the icon "to do's" at the top of the screen



Opportunity “Created By” now displayed.

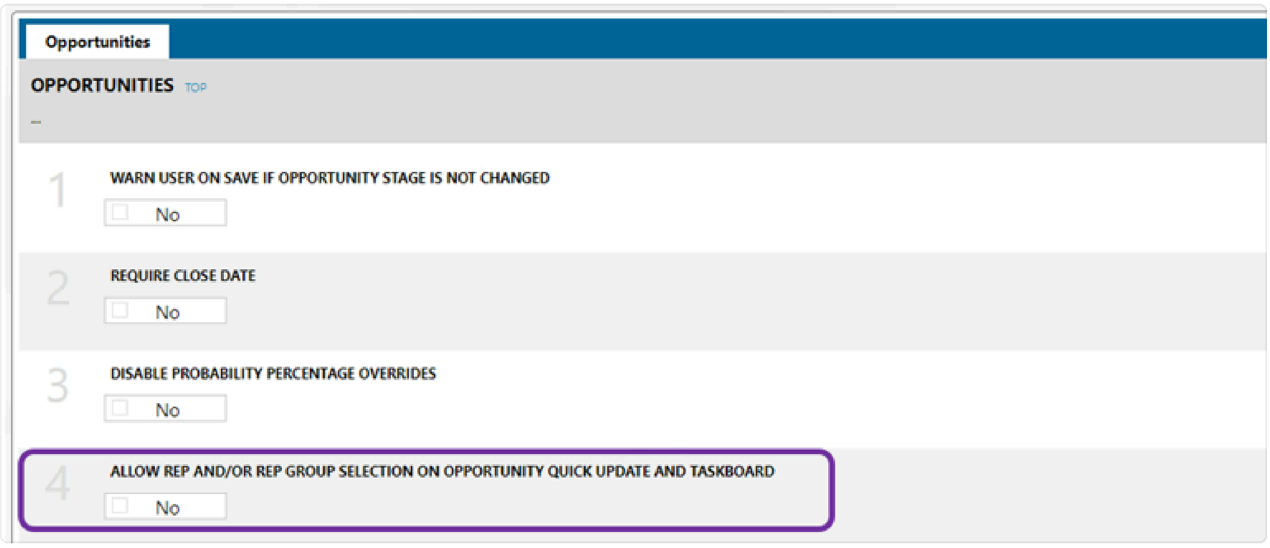
The opportunity isn’t always created by the salesperson themselves, so we now display (read only) who actually created an opportunity.



Group Security Changes

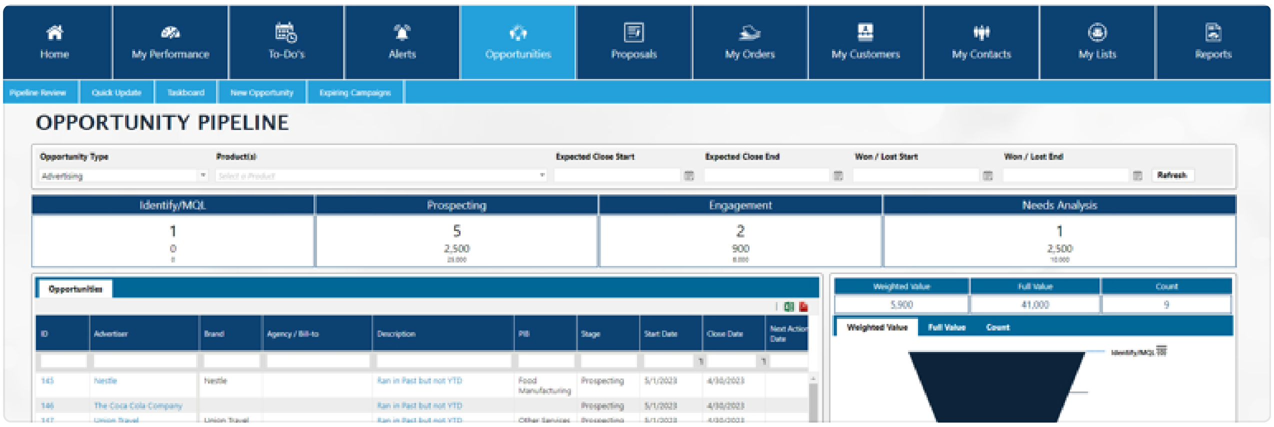
Opportunity Security

There is a new flag in Group Security (CRM) for Allowing reps to see other reps opportunities on the Opportunity Dashboard, Quick Update, and Taskboard views. This will be subject to the User Security setup and whose Opportunities that user can view.

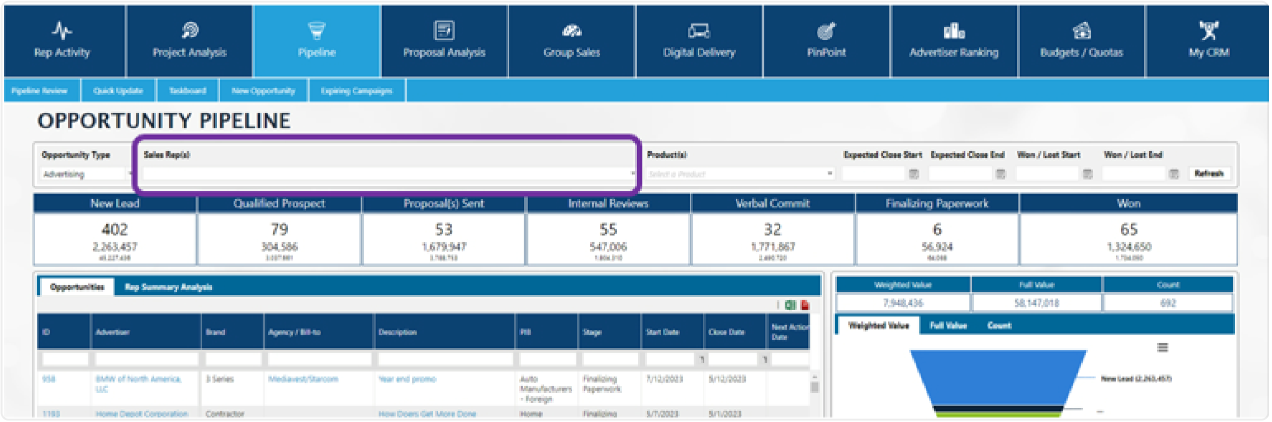


In previous versions, a CRM Sales Manager rep type would see the list of reps and/or rep groups as a filter on the Opportunities screen, but a Sales Rep would not.

This was a Sales REP view:



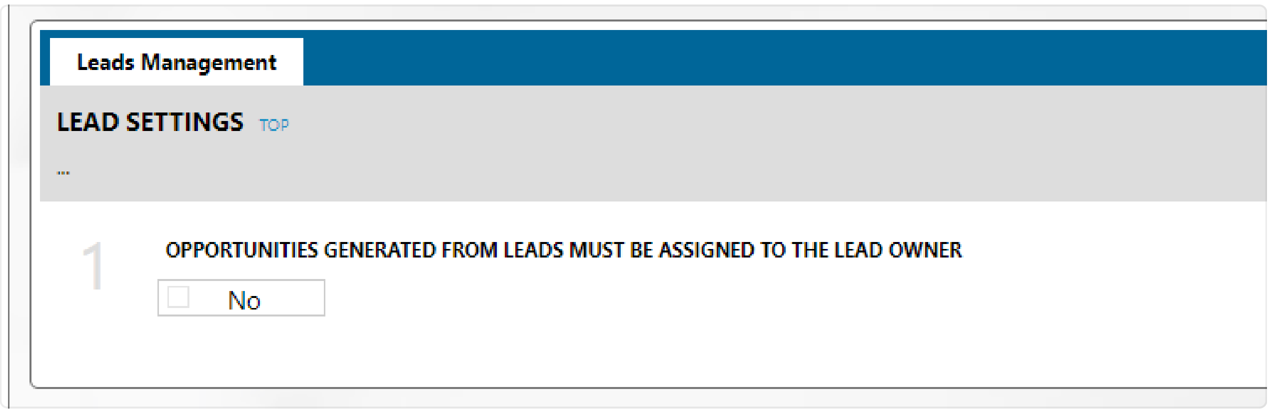
This is the Sales MANAGER view:



Now, both the rep and the manager will potentially be able to sales reps filter if the above group security is set to Yes for their Group Security. Be sure to set this flag to YES for your managers groups so they will continue to have the filter.

Leads Security

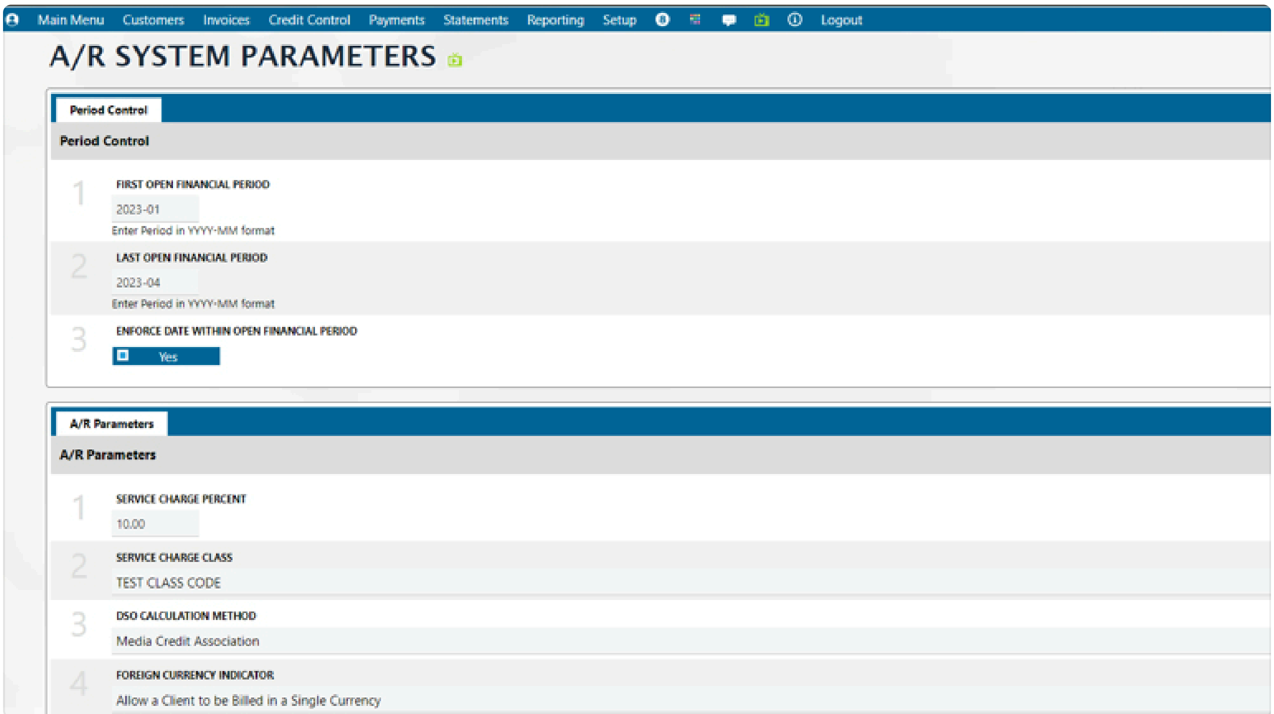
When creating an opportunity from a lead, the default behavior is that the lead owner will become the opportunity owner, but that can be modified. There is a new security setting to enforce that the lead owner must be the opportunity owner.



Accounts Receivable Module

A/R System Parameters Update

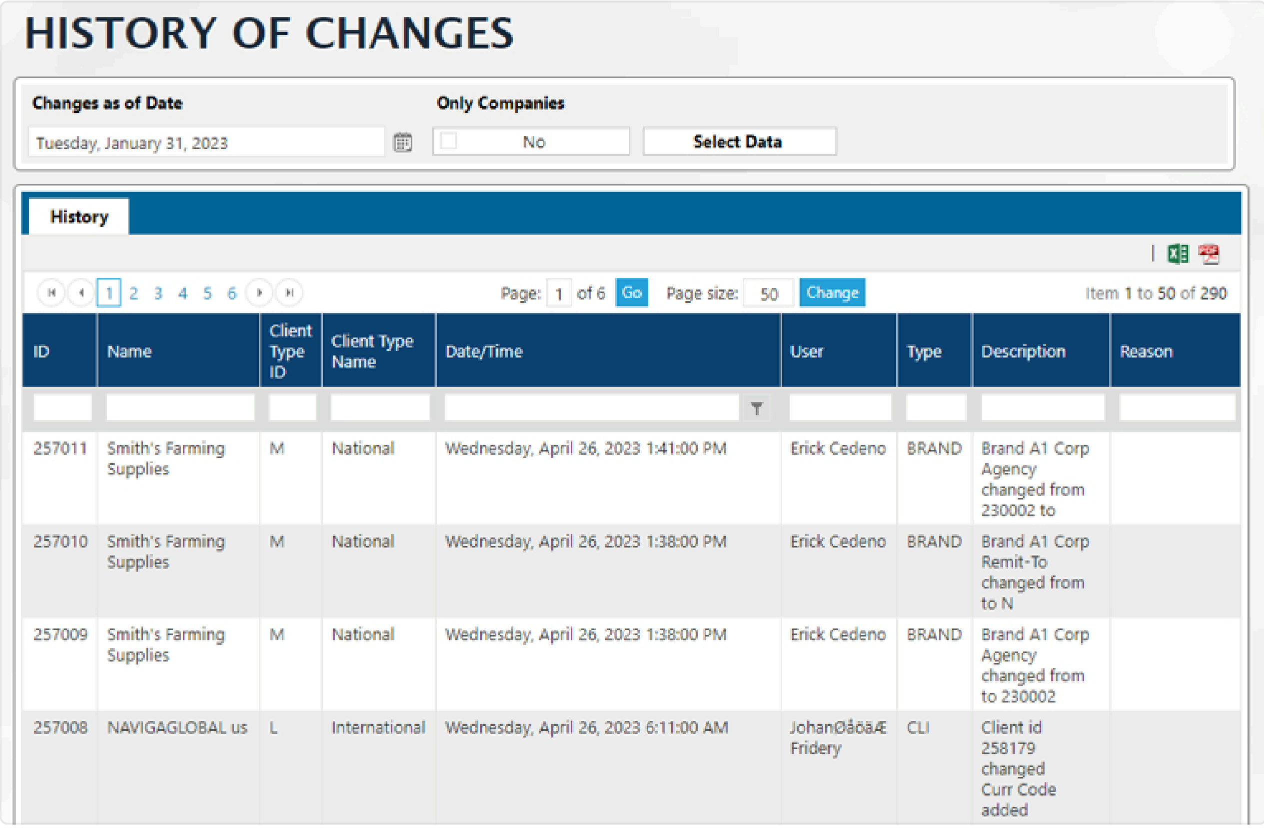
The A/R System Parameters got a little make-over in this release. There are a ton of settings in here so the new layout will make it a little easier to find settings and it also gives us a little more space to add more descriptive tool tips in there.



History of Name Changes Report

Navigate to A/R module → Customers → History of Name Changes. 4 new fields were added to the history of name change report.

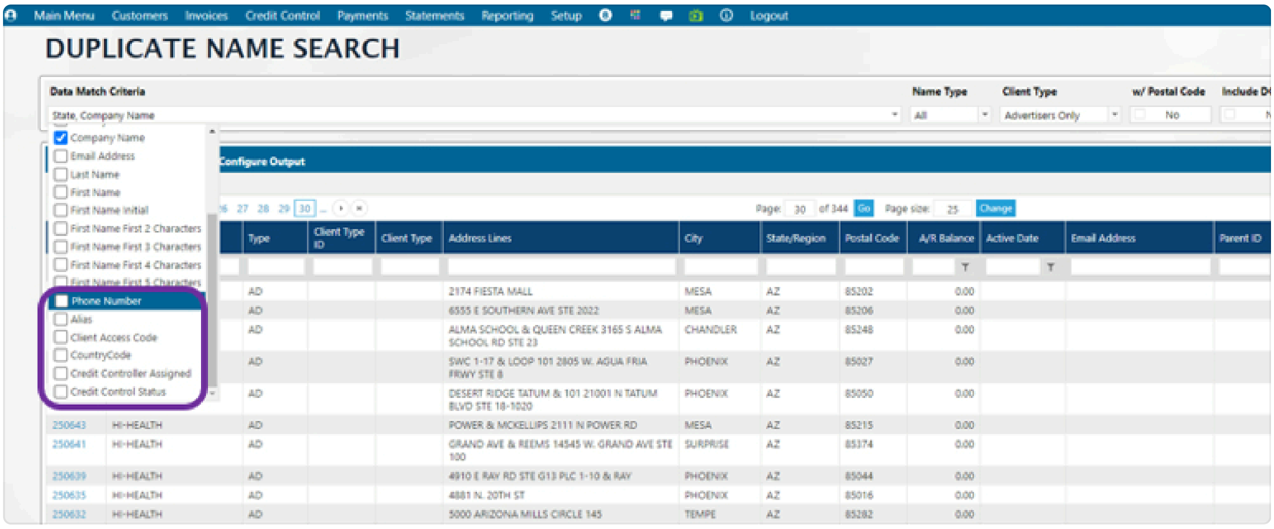
- Client ID
- Client Name
- Client Type ID
- Client Type Name



ID	Name	Client Type ID	Client Type Name	Date/Time	User	Type	Description	Reason
257011	Smith's Farming Supplies	M	National	Wednesday, April 26, 2023 1:41:00 PM	Erick Cedeno	BRAND	Brand A1 Corp Agency changed from 230002 to	
257010	Smith's Farming Supplies	M	National	Wednesday, April 26, 2023 1:38:00 PM	Erick Cedeno	BRAND	Brand A1 Corp Remit-To changed from to N	
257009	Smith's Farming Supplies	M	National	Wednesday, April 26, 2023 1:38:00 PM	Erick Cedeno	BRAND	Brand A1 Corp Agency changed from to 230002	
257008	NAVIGAGLOBAL us	L	International	Wednesday, April 26, 2023 6:11:00 AM	JohanØåöäÆ Friedery	CLI	Client id 258179 changed Curr Code added	

Duplicate Names Report – new fields added

Some additional Data Match Criteria has been added to the dropdown:



- Phone Number
- Alias
- Client Access Code
- Country
- Credit Controller assigned
- Credit Control Status

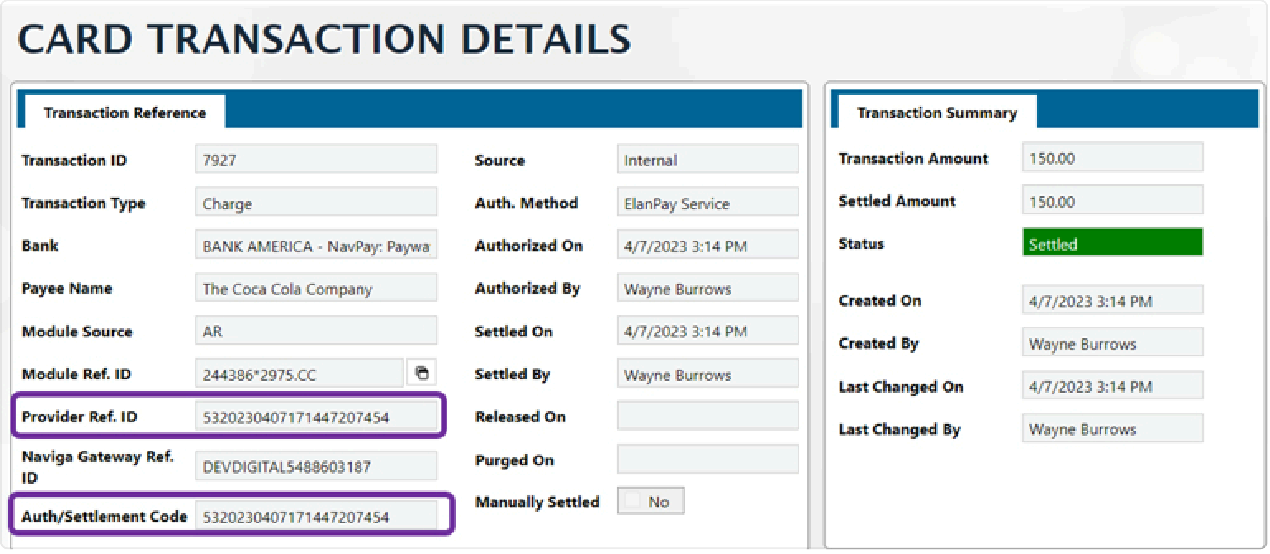
These same new fields were also added to the Configure output screen in case you wish to display that on the report itself.

New fields available on Payment Receipt

Two new fields have been added for Payment Receipts:

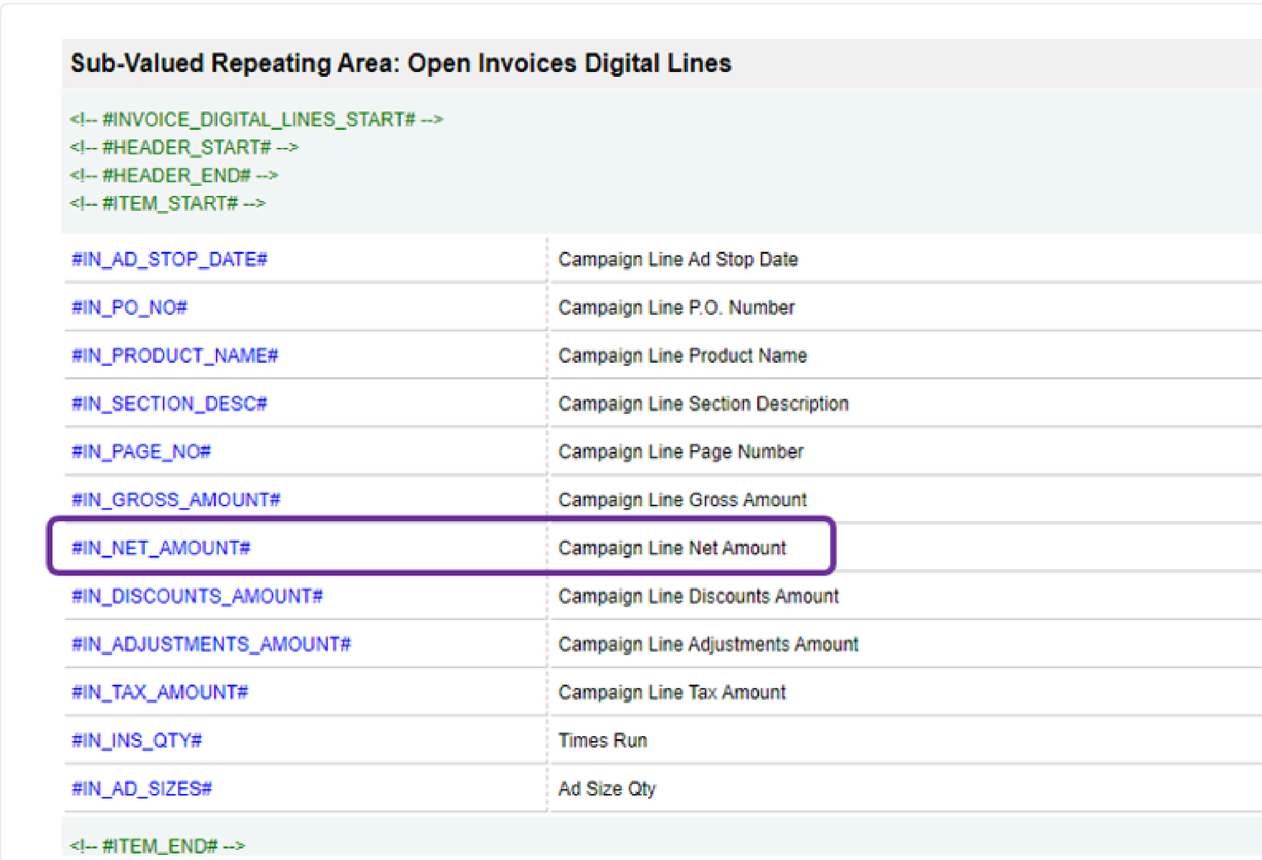
#PROVIDER_REF_ID#	Provider Reference ID
#AUTH_SETTLEMENT_CODE#	Authorize / Settlement Code

On the credit card transaction details window, these two fields correspond to the fields displayed here:



New field available on Statement

There is a new merge tag available on statements for #IN_NET_AMOUNT# (previously only gross amount was available here:



Sub-Valued Repeating Area: Open Invoices Digital Lines

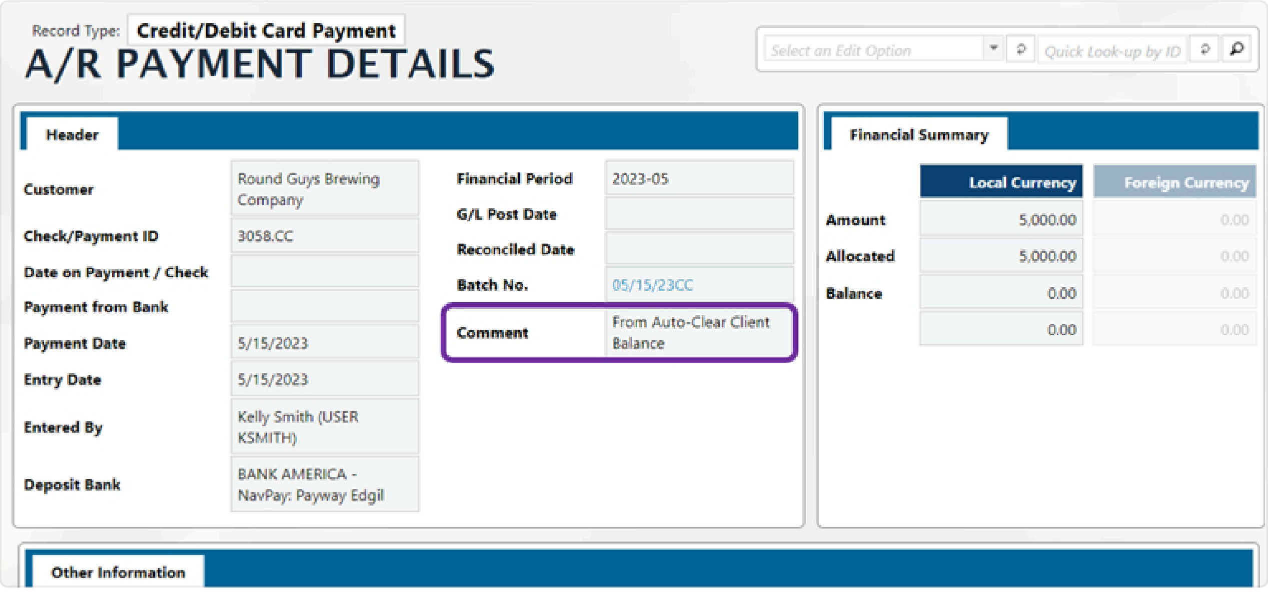
<!-- #INVOICE_DIGITAL_LINES_START# -->
<!-- #HEADER_START# -->
<!-- #HEADER_END# -->
<!-- #ITEM_START# -->

#IN_AD_STOP_DATE#	Campaign Line Ad Stop Date
#IN_PO_NO#	Campaign Line P.O. Number
#IN_PRODUCT_NAME#	Campaign Line Product Name
#IN_SECTION_DESC#	Campaign Line Section Description
#IN_PAGE_NO#	Campaign Line Page Number
#IN_GROSS_AMOUNT#	Campaign Line Gross Amount
#IN_NET_AMOUNT#	Campaign Line Net Amount
#IN_DISCOUNTS_AMOUNT#	Campaign Line Discounts Amount
#IN_ADJUSTMENTS_AMOUNT#	Campaign Line Adjustments Amount
#IN_TAX_AMOUNT#	Campaign Line Tax Amount
#IN_INS_QTY#	Times Run
#IN_AD_SIZES#	Ad Size Qty

<!-- #ITEM_END# -->

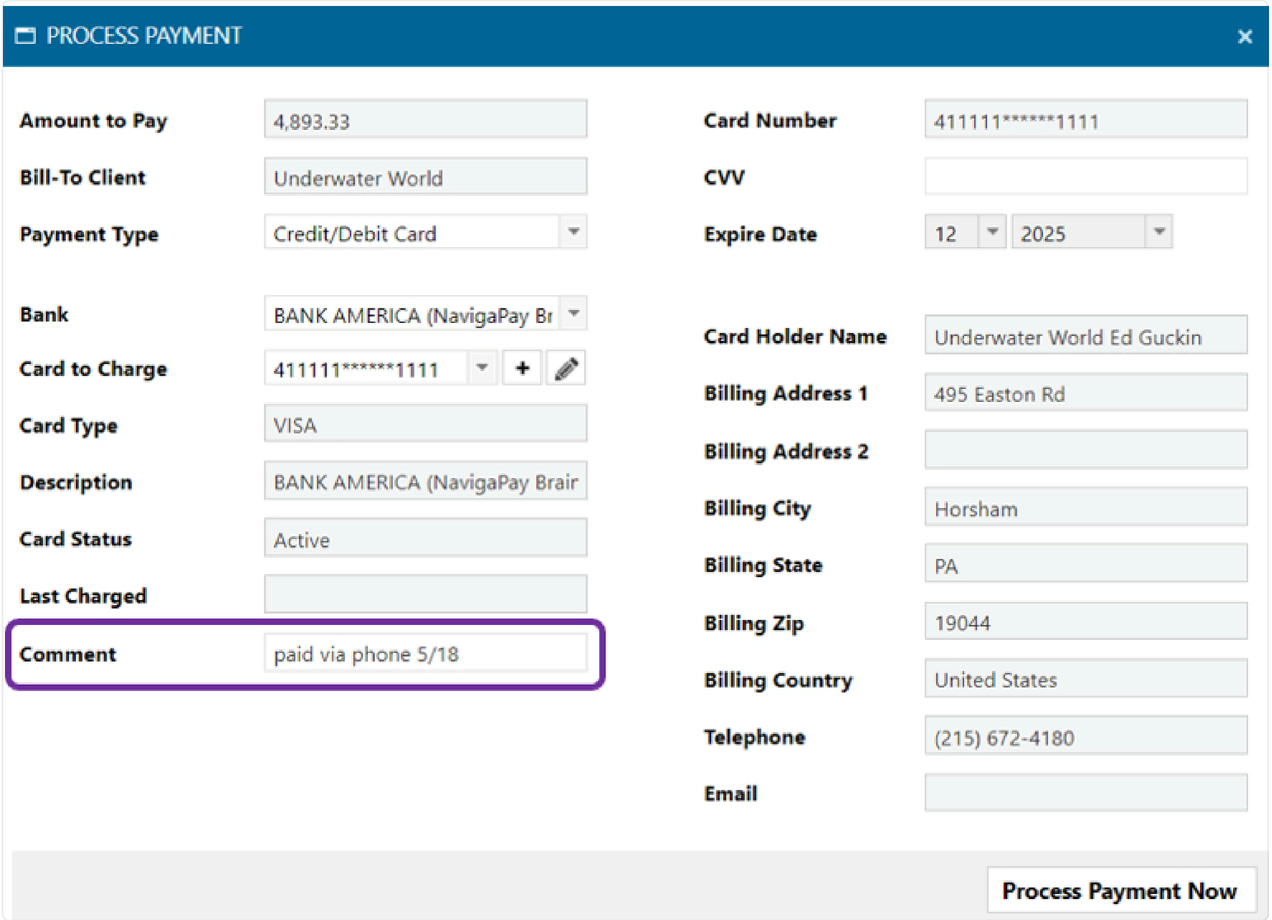
Comment on Auto-Clear payments

When opening a payment that was made via Auto-Clear client balance, the payment will have a comment added "From Auto-Clear Client Balance"

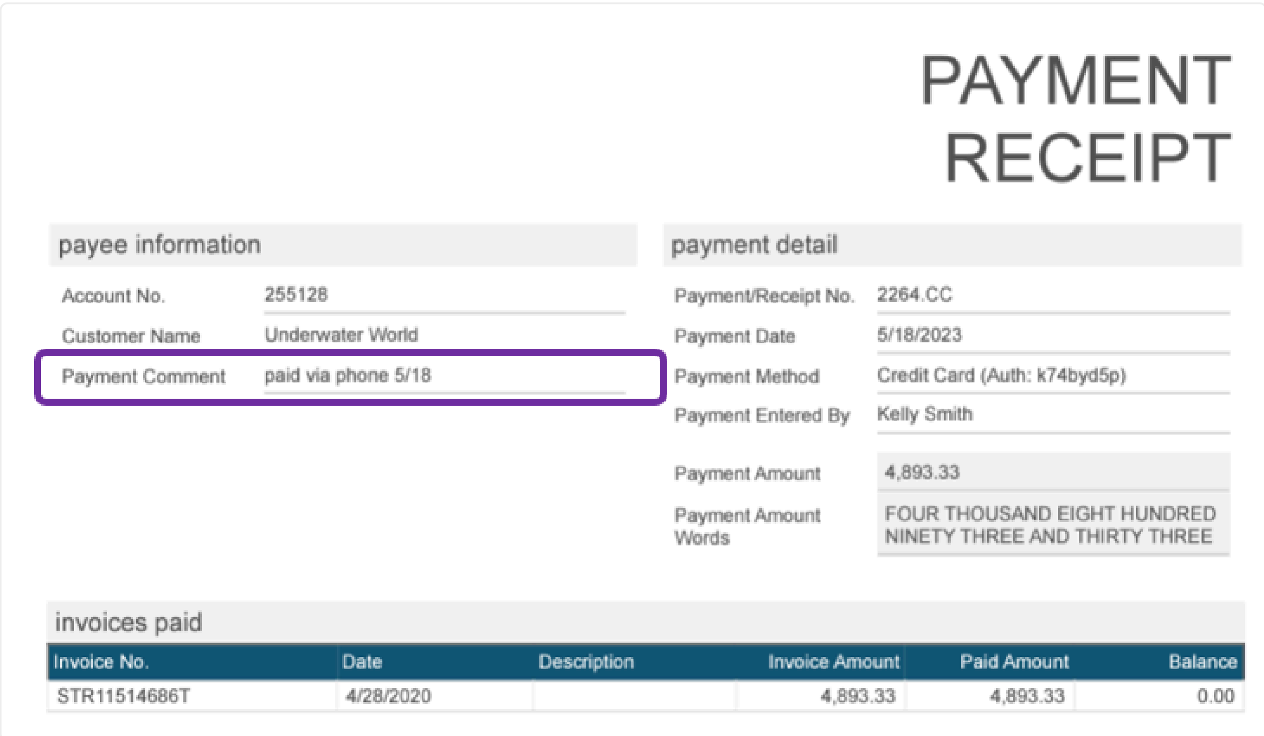


Comment added to Credit Card Payments in A/R Module

When creating a payment in the A/R Module, via Payments → Pay Invoice(s), there is a new field to enter a payment comment. This text can be displayed on the payment receipt, if desired. While technically a new feature added for 23.3, we were able to patch this one back to 23.2, so you can utilize it in either release.



If you would like to display that on the receipt, you may, with mergetag #PAYMENT_COMMENT#


PAYMENT RECEIPT

payee information

Account No.	255128
Customer Name	Underwater World
Payment Comment	paid via phone 5/18

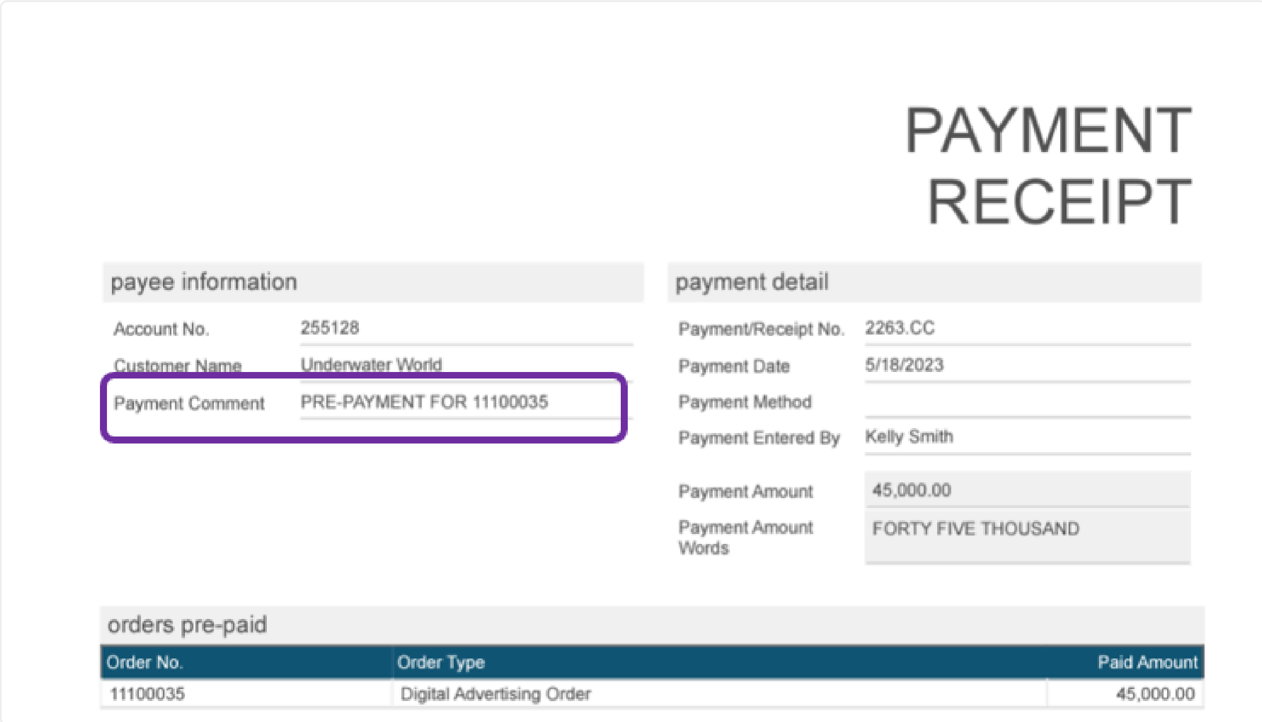
payment detail

Payment/Receipt No.	2264.CC
Payment Date	5/18/2023
Payment Method	Credit Card (Auth: k74byd5p)
Payment Entered By	Kelly Smith
Payment Amount	4,893.33
Payment Amount Words	FOUR THOUSAND EIGHT HUNDRED NINETY THREE AND THIRTY THREE

invoices paid

Invoice No.	Date	Description	Invoice Amount	Paid Amount	Balance
STR11514686T	4/28/2020		4,893.33	4,893.33	0.00

This same comment field is not on prepayments, because on those, the system auto-generates a payment comment for you indicating that it is a prepayment for and then specifies the campaign number, as displayed on the example receipt below.



PAYMENT RECEIPT

payee information

Account No.	255128
Customer Name	Underwater World
Payment Comment	PRE-PAYMENT FOR 11100035

payment detail

Payment/Receipt No.	2263.CC
Payment Date	5/18/2023
Payment Method	
Payment Entered By	Kelly Smith
Payment Amount	45,000.00
Payment Amount Words	FORTY FIVE THOUSAND

orders pre-paid

Order No.	Order Type	Paid Amount
11100035	Digital Advertising Order	45,000.00

Advertiser Portal

Remove comments on Disable Navigation

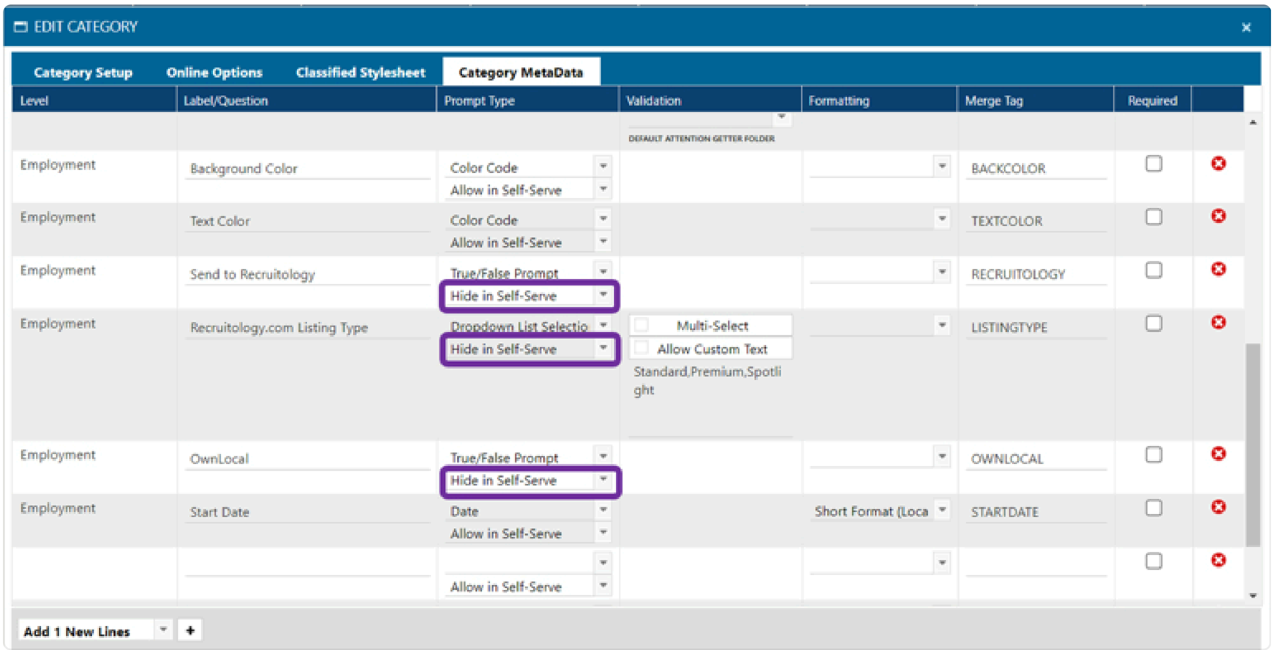
In a previous release we changed the behavior of the navigation buttons at the top of the page. It used to be that all the buttons would always display, but you could display a message instead of the data on any of the screens. In 2023.2 we changed the behavior to hide the button completely when Disable was set to yes. In 2023.3, we removed the boxes for comments from the setup screen because they were no longer useful.

Classified Self-Service Portal

Hide unwanted metadata

The classified self-service portal currently allows only for flat rate packages. However, internally, there are some metadata fields for the same category, which are used for upselling that you might not wish to show on classified portal.

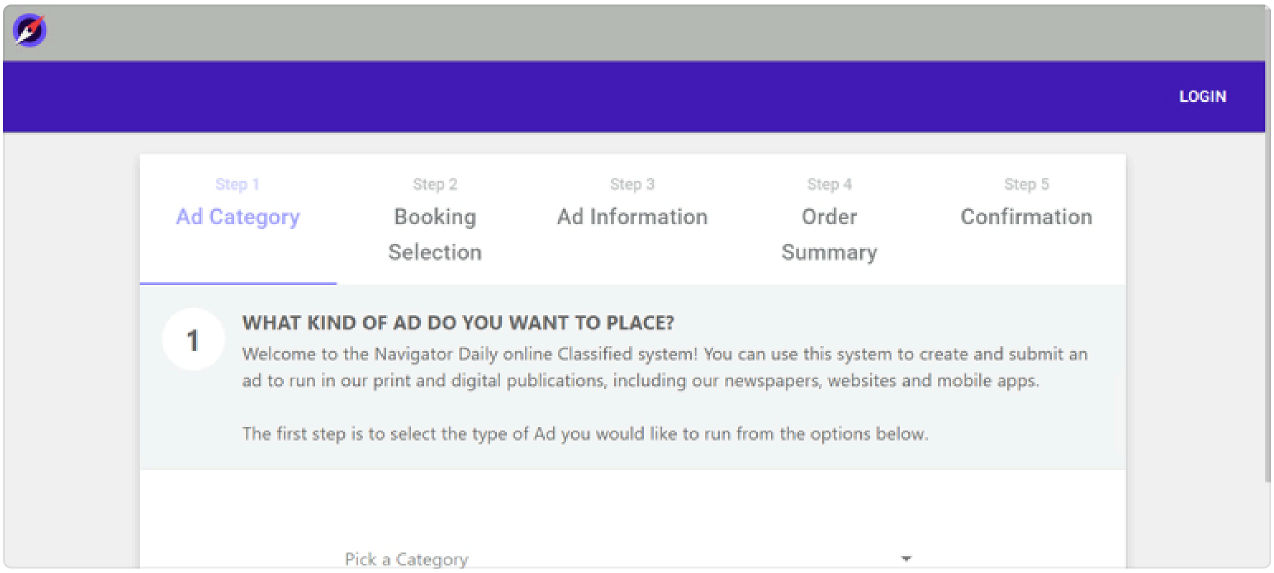
Now, in the Metadata tab in Category setup, you will see an additional field to Allow in Self Service or Hide in Self Service. The default will be to Allow in Self Service so that if you do nothing upon upgrading, it will continue to work as it always has. If there are certain metadata questions you wish to hide in any category, simply navigate to that category in setup, and change the option to "Hide in Self Service" as i have done below with my Employment upsells:



1. Navigate to Setup → Classified Order Setup → Classified Category Tree Setup
2. Select Desired tree from the dropdown
3. Select Desired Category which contains the metadata to be hidden
4. Select Category metadata tab in the popup
5. Change the setting on the metadata question as highlighted above
6. Click Save at the bottom

Customize second color bar

In the classified self-service portal, you have always been able to customize your color scheme on the logo bar and the highlight color in the text (gray below and purple for the text highlight.)



But, the second color bar at the top, (purple in the screenshot), was hardcoded on the page. We have now added that to the Classified Self-service setup page, allowing you to choose what color you would like for that second bar.

Please note - by default, this becomes a bright pink, so you WILL want to change it to something that matches your color scheme. This will be displayed as option #3 under the Override Color Scheme options. Navigate to Campaigns → Classified Self-Serve → Self-Serve Setup and scroll down to Color Configuration after selecting the Profile you wish to modify.

You will also notice that the links at the top of the page have been removed. In a future release we will bring them back and make them configurable, but for now we have removed them so they don't confuse your customers.

General System - Multiple modules

Client Access Codes

The standard design of the Naviga Ad system assumes that any system user can search for, and find, any client. Once the client is accessed the data is filtered depending on user/group security. Order information can be filtered by what was purchased and/or by who sold the ads, CRM information can be filtered and A/R information can be hidden. This allows for minimizing duplicates while segregating order and CRM data. The lack of duplicates streamlines reporting and allows for unique customer records for interfaces.

While not a standard, or recommended, setting; it is possible to hide customer records entirely. If this setting is selected, duplicate clients will be created, this will have an impact on reporting and integration to external systems. Setting this will limit duplicate checking and allow for creation of duplicate clients without warning.

If your business requires this strong segregation of name information, notify Naviga to activate the system wide default. Set up the client access codes. These may be loaded from your product codes or your company codes, or may be set up as a unique table. Ensure that an access code is included for each client in your client import. Set the appropriate client codes that each group of users should see in name security for each user security group.

When new customer records are created in the system, the software will default in the access code(s) from the security group of the user that created the name record. These code(s) can be edited by users that have access to the A/R screen in name maintenance.

On customer searches, system reports and all screens in the software users will only have access to clients coded to match their security access. Other clients will be hidden.

In 2022 we introduced the idea of a Customer Enhancement Portal, where you all get to add feature requests, look at feature requests submitted by others, add comments, and vote on things you would like to see us implement in the system. Items that were voted up in the Enhancement Portal will have this check mark next to the feature in the release guide.