

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

ID	Description	Custom Data Form	Adjustment Ad Type	Inactive	
MG	Make Good		Flat Rate cpm	☐	✖
MISC	Finance Adjustment		Adjustment C/D (Non-commissional)	☐	✖
CORR	Correcting Adjustment		Adjustment C/D	☐	✖
PRINTER	Adjustment for Printer Error		Adjustment C/D (Non-commissional)	☐	✖
				☐	+

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.

ADJUSTMENT REQUEST APPROVAL RULES

Ticket Setup Tables

- Campaign Tickets Setup
 - Ticket Teams
 - Master Ticket Workflow
 - Ticket Type Workflows
 - Ticket Types
 - Ticket Priorities
 - Ticket Workflow Routing
- Adjustment Tickets Setup
 - Ticket Types
 - Ticket Workflow Routing**

Codes

Ticket Type: Adjustment for Printer Error (both)

Product Group: Demo Group

Ticket Team: Super Powers

Approval Escalation Rules

From Amount	Up to Amount	Approvals Required	
0.00	250.00	Automatic Approval	✗
250.01	5,000.00	1: Must be approved by User: Sherri ABC (ABCTEST1) or Team: Super Powers (ALLPOWERFUL)	✗
5,000.01	999,999,999.00	1: Must be approved by User: Sherri ABC (ABCTEST1) or Team: Ad Operations (ADOPS) 2: Must be approved by User: Dan Pellegrini (DAP) or Team: Managers (MNGRS) 3: Must be approved by User: Kelly Smith (USER_KSMITH) (KSMITH) or Team: Super Powers (ALLPOWERFUL)	✗

Add 1 New Lines

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.

APPROVALS

Approvals Required

From 5,000.01 to 999,999,999.00

	User	Team
1	Sherri ABC (ABCTEST1)	Ad Operations
2	Dan Pellegrini (DAP)	Managers
3	Kelly Smith (USER KSMITH) (KSMITH)	Super Powers
4		

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 screenshot displays the 'CAMPAIGN LINES' interface. On the left is a 'Campaign Explorer' sidebar with a tree view containing items like 'Campaign', 'Line Items', 'Material Management', 'Campaign Budget', 'Campaign Custom Data Forms', 'Digital Serving Analysis', 'Co-op Billing', 'User Defined Fields', 'Notes / Comments', 'Revenue Allocation', 'Production Contacts', 'Teasheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', and 'History of Changes'. At the bottom of the sidebar are links for 'Go to CRM View' and 'Go to Advertiser View'.

The main area is titled 'Campaign Lines' and contains a form for campaign details. Fields include:

- Campaign ID:** 11531
- Advertiser:** Underwater World Honolulu
- Client Type:** Local (S)
- Brand:** Underwater World
- Agency:** (empty)
- Status:** Invoicing Started
- Incentives Status:** 1 Available
- Advertiser Proposal ID:** (empty)
- Advertiser Budget:** 0.00
- Start Date:** 1/1/2023
- End Date:** 3/31/2023
- Gross Amount:** 34,700.50
- Commission Amount:** 0.00
- Net Amount:** 34,700.50
- Estimated Tax:** 0.00
- Estimated Total:** 34,700.50
- Currency:** Local Currency

Below the form is a tabbed interface with three tabs: 'Line Details', 'Applied Incentives', and 'Tickets'. The 'Tickets' tab is selected, and a purple arrow points to it. Within the 'Tickets' tab, there are two buttons: 'New Ticket' and 'New Adjustment Request'. The 'New Adjustment Request' button is highlighted with a purple rectangle.

Below the buttons is a table with the following columns: ID, Type, Short Description, Status, Priority, Assigned To, Created Date/Time, Created by User, and Last Updated. The table currently shows no records, with the text '-- No Records Returned --' at the bottom.

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.

NEW TICKET 291 FOR CAMPAIGN 11531

Ticket Type
 Adjustment for Printer Er

Priority
 Ignore and see if it goes

Status
 Pending Approval

Assigned Team
 [Blank]

Assigned User
 [Blank]

Due Date
 [Blank]

Created Date
 Wednesday, April 26, 2023

Custom Data Form [Edit]

Team Owner
 Sales - Team A

User Owner
 Kelly Smith (USER KSMIT)

Short Description
 [Blank]

Long Description
 11pt Arial [A] [A] Formats [B] [I] [U] [S] [List Icons] [0 WORDS]

Notes **Approval Details** **Adjustment Details** **History of Changes** **Attachments**

Select Lines to Adjust

ID	Product	Date	Invoice ID	Adjustment Line ID	Invoiced Amount	Adjustment Amount	Remove
					Y	Y	

-- No Records Returned --

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.
- 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)
 - Enter a short description (required) and long description, if desired. This will assist the approving user in knowing what the adjustment is for.
 - Click the "Select Lines to Adjust" button. A popup will open and display all the invoiced insertions on the campaign.

NEW TICKET 292 FOR CAMPAIGN 11531

Long Des 11pt

ADJUSTMENT DETAIL

Adjustment Type Credit Total Adjustments -6,500.00

	ID	Product	Date	Invoice ID	Adjustment Line ID	Invoiced Amount	Adjustment Amount
☒	29954.1	The Star QA Daily Newspaper	1/6/2023	ABC1520115T		4,000.00	-4,000.00
☒	29954.2	The Star QA Daily Newspaper	1/13/2023	ABC1520115T		4,000.00	-2,500.00
☐	29954.3	The Star QA Daily Newspaper	1/20/2023	ABC1520115T		4,000.00	
☐	29954.4	The Star QA Daily Newspaper	1/27/2023	ABC1520115T		4,000.00	
☐	29954.5	The Star QA Daily Newspaper	2/3/2023	ABC1520049T		4,000.00	
☐	29954.6	The Star QA Daily Newspaper	2/10/2023	ABC1520049T		4,000.00	
☐	29954.7	The Star QA Daily Newspaper	2/17/2023	ABC1520049T		4,000.00	
☐	29954.9	The Star QA Daily Newspaper	3/3/2023	ABC1520027T		4,000.00	
☐	29954.10	The Star QA Daily Newspaper	3/10/2023	ABC1520027T		4,000.00	
☐	29954.11	The Star QA Daily Newspaper	3/17/2023	ABC1520027T		4,000.00	
☐	29954.12	The Star QA Daily Newspaper	3/24/2023	ABC1520027T		4,000.00	
						46,750.00	-6,500.00

Notes

Select

ID

-- No Reco

Remove

Apply

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.

TICKET 292 FOR CAMPAIGN 11531

0 WORDS

Notes

Approval Details

Adjustment Details

History of Changes

Attachments

	Required Approval	Approval Status			
		Type	User Name	Date/Time	Comment
1	User: Sherri ABC (ABCTEST1) or Team: Ad Operations (ADOPS)				
2	User: Sally Sales Manager (SALESMGR) or Team: Managers (MNGRS)				
3	User: Kelly Smith (USER KSMITH) (KSMITH) or Team: Sales - Team A (SALESA)				

Delete

Cancel

Action Options

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:

TICKET 292 FOR CAMPAIGN 11531

ADJUSTMENT REQUEST ACTION

 Just Save my Changes ☒ Selected	 Approve this Request ☐ Selected	 Reject this Request ☐ Selected	 Request More Information ☐ Selected
--	---	--	---

Optional Comment

Save

- 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

Notes	Approval Details	Adjustment Details	History of Changes	Attachments
Adjustment Request Amount		-8,000.00		
Required Approval		Approval Status		
		Type	User Name	Date/Time
1	User: Sherri ABC (ABCTEST1) or Team: Ad Operations (ADOPS)	Approved	Sherri ABC	Wednesday, April 26, 2023 3:53:28 PM
2	User: Sally Sales Manager (SALESMGR) or Team: Managers (MNGRS)			
3	User: Kelly Smith (USER KSMITH) (KSMITH) or Team: Sales - Team A (SALESA)			
Cancel Action Options				

- 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.

ADJUSTMENT REQUESTS DASHBOARD

Ticket Type

Assigned To

Owner

Entered By

Priority

Status

Include Closed

Closed Date Range

3 items checked

Assigned User

Owner User

☒ Yes

From Date

To Date

Select Data

Pending Approval

Partially Approved

More Information Required

Denied

Approved

1

0

1

1

9

Selected Tickets

Configure Output

Drag a column header and drop it here to group by that column

Ticket ID

Campaign ID

Advertiser Name

Product Group Name

Product(s)

Type

Short Description

Status ID

Priority

Assigned To

Assigned to Team Name

Owner User Name

Owner Team Name

Created by User

Created Date/Time

Last Updated by

Last Updated

292

11531

Underwater World Horsham

ABC - Kelly's Co.

The Star QA Daily Newspaper (QA1)

PRINTER

DENIED

Ignore and see if it goes away

Kelly Smith (USER KSMITH)

Sales - Team A

Kelly Smith (USER KSMITH)

Sales - Team A

Kelly Smith (USER KSMITH)

Wednesday, April 26, 2023 3:39:55 PM

Sally Sales Manager

Wednesday, April 26, 2023 4:03:56 PM

254

12131

Kraft Foods

Demo Group

The Star Daily Newspapers (DEMO10)

MG

Testing a smaller Request

APPROVED

Ignore and see if it goes away

Ad Operations

Dan Pellegrini

Managers

Dan Pellegrini

Friday, April 7, 2023 10:17:46 AM

Sherri ABC

Monday, April 24, 2023 11:27:27 AM

258

12131

Kraft Foods

Demo Group

The Star Daily Newspapers (DEMO10)

MG

Make Good request

APPROVED

Ignore and see if it goes away

J.Shine

Managers

J.Shine

Monday, April 10, 2023 8:50:14 AM

J.Shine

Monday, April 10, 2023 8:50:14 AM

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

ON SCREEN COLUMNS		EXCEL EXPORT COLUMNS	
Reset Configuration	Save Configuration	Reset Configuration	Save Configuration
Available Grid Columns Product/Group ID Advertiser ID Agency ID Agency Name Assigned to Team ID Owner User ID Owner Team ID Due Date Custom Data Form ID Custom Data Form Name Custom Data Form Status Custom Data Form Present Custom Data Form is Missing Required Data Has Attachment(s) Adjustment Request Amount Status	Selected Grid Columns Ticket ID Campaign ID Advertiser Name Product Group Name Product(s) Type Short Description Status ID Priority Assigned To Assigned to Team Name Owner User Name Owner Team Name Created by User Created Date/Time Last Updated by Last Updated	Available Export Columns Custom Data Form ID Custom Data Form Name Custom Data Form Status Custom Data Form Present Custom Data Form is Missing Required Data Has Attachment(s) Adjustment Request Amount	Selected Export Columns Ticket ID Campaign ID Product/Group ID Advertiser ID Advertiser Name Agency ID Agency Name Product Group Name Product(s) Type Short Description Status ID Status Priority Assigned To Assigned to Team ID Assigned to Team Name Owner User ID Owner User Name Owner Team ID Owner Team Name

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.

OTHER INFORMATION
INVENTORY NCSNews.com
CUSTOM TARGETING
GEOGRAPHY
DEVICE CATEGORIES
 Include
 Device Categories
 -- No Records --
 Type here to filter/search
☐ Connected TV
☐ Desktop
☐ Feature Phone
☐ Smartphone
☐ Tablet

DEVICE MANUFACTURERS

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

:: OTHER INFORMATION			
:: INVENTORY		NCSNews.com	
:: CUSTOM TARGETING			
:: GEOGRAPHY		United States, Texas	
Description	Type	Hierarchy	
United States	COUNTRY	United States	include
Texas	STATE	United States → Texas	Exclude
Bulk Entry		Exclude	

Pause/Resume GAM orders in Naviga Ad

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

EDITING COST PER THOUSAND LINE: 32294			
Pricing	Other	Google Ad Manager	Expected Sizes
Targeting Preset	Line Description	Creative Type	Ad Server Override Qty
Template (Deprecated)	Delivery Priority	Max Duration (in seconds)	Maximum Impressions
Google Line Status [Pause]	Line Type	Display Creatives (Roadblocking Type)	Grace Period (in days)
READY	STANDARD	Rotate Creatives	Allow Same Advertiser Exception
Google Line ID [view in GAM]	Cost Type		
6284161107	CPM		
:: SYNC ISSUE(S)			
None			
:: OTHER INFORMATION			
:: INVENTORY			
Star Website 1			
:: CUSTOM TARGETING			
:: GEOGRAPHY			

EDITING COST PER THOUSAND LINE: 32294			
Pricing	Other	Google Ad Manager	Expected Sizes
Targeting Preset	Line Description	Creative Type	Ad Server Override Qty
Template (Deprecated)	Delivery Priority	Max Duration (in seconds)	Maximum Impressions
Google Line Status [Resume]	Line Type	Display Creatives (Roadblocking Type)	Grace Period (in days)
PAUSED	STANDARD	Rotate Creatives	Allow Same Advertiser Exception
Google Line ID [view in GAM] [API]	Cost Type		
6284161107	CPM		
:: SYNC ISSUE(S)			
None			
:: OTHER INFORMATION			
:: INVENTORY			
Star Website 1			
:: CUSTOM TARGETING			
:: GEOGRAPHY			

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 option 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](#).

The screenshot shows a web interface for setting up an Advertiser. At the top, there is a table titled "Default Ad Server Team(s)".

ID	Description	Default Team(s)
GAMMSG	GAM MSG Sandbox account	
GAMTST	MediaSpan Test Google Ad Manager	

Below the table, there are two input fields:

- Advertiser Prefix:** A text input field. Below it, a note states: "When automatically creating a new Advertiser or Agency, this option will use this field to prefix the name used in GAM."
- Advertiser Suffix:** A text input field, which is highlighted with a purple border. Below it, a note states: "When automatically creating a new Advertiser or Agency, this option will use this field as a suffix for the name used in GAM. You can use a wildcard of {NAME_ID} and it will use the Naviga Name ID."

 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.

RECONCILE CAMPAIGN ACTUALS

Campaign Type

Performance

Product Group

National Products (NATL)

Group Selection

Use Products on L

Line Types

Cost Per Thousand, Cost Per Click, Cost Per Day

Specific Campaign ID

From Date

6/1/2023

Through Date

6/30/2023

Exclude Lines w/
Actuals

☒ Yes

Exclude Lines w/o
External ID

☐ No

Ignore Line
Overrides

☐ No

Get Campaigns

Selected Campaigns

Apply Quantity Served

Campaign	Line ID	Advertiser / Brand	Product	Line Desc	Line Start	Line End	Line Type	Reconcile To	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server City Served	Ad Server Viewable City Served	Clicks Served	3rd Party City	3rd Party Clicks	4th Party City	4th Party Clicks	Actual City	Actual Clicks	Actual Amount	Run of Network	Apply
1414	4369.13	BMW of North America, LLC 3-Series	Naviga Network (NATL)	Targeted CP M Rate	6/1/2023	6/22/2023	CPM	Estimate	No Caps	20.00000	10,325	250.46	0	0	0	0	0	0	0	0	0	0.00	6.88	↔
1414	4370.13	BMW of North America, LLC 3-Series	The Navigator Website (NATL)	Open CPM Rate	6/1/2023	6/21/2023	CPM	3rd Party	No Caps	13.00000	16,116	283.26	0	0	0	0	0	0	0	0	0	0.00		↔
1429	4429.3	Starbucks Starbucks (Brand)	Naviga Network (NATL)	RON CPM	5/1/2023	6/1/2023	CPM	Ad Server Viewable	Capped at Individual Monthly Goals	30.00000	18,043	\$41.29	15,967	1,943	204	0	0	0	0	0	0	0.00	6.88	↔
1519	4766.6	BMW of North America, LLC 3-Series	The Navigator Website (NATL)	Open CPM Rate	6/1/2023	6/30/2023	CPM	Ad Server	No Caps	11.05000	2,792	30.85	1,251	173	9	0	0	0	0	0	0	0.00		↔
1525	4830.6	The Coca Cola Company Coca Cola Corporate	The Navigator Website (NATL)	Open CPM Rate	6/1/2023	6/12/2023	CPM	Ad Server	Capped at Individual Monthly Goals	13.00000	27,367	355.78	0	0	0	0	0	0	0	0	0	0.00		↔
1528	4848.6	BMW of North America, LLC 3-Series	The Navigator Website (NATL)	Open CPM Rate	6/1/2023	6/30/2023	CPM	Ad Server	Capped at Total Goal	11.05000	2,912	32.18	1,159	132	11	0	0	0	0	0	0	0.00		↔

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.

LAYOUT MAINTENANCE

Layout Maintenance

Layout ID

6COLBS

New

Layout Description

6-Column BS/Tab

Unit of Measure

Inches

Inactive

☐ No

Max Columns

12

Fractional Columns

Use Whole Columns

Column Widths

Use Whole Columns

Use Half Columns

Use Quarter Columns

Use Tenth Columns

2	3.166666
3	4.832000
4	6.498000
5	8.164000
6	9.830000
7	12.330000

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.

CAMPAIGN SEARCH

CAMPAIGN SEARCH

Search Criteria

Advertiser ID

Advertiser Name

Agency ID

Agency Name

Campaign ID

Campaign Description

Product Group

Product

Section

Position

ID

Description

BACKSP

ROSS

External ID

Line ID

Invoice ID

Campaign P.O. Number

Start Range

End Range

Select any campaigns that were running at any point between the start and end range.

Clear Form

Search

Results

History

1

Page: 1 of 1

Go

Page size: 50

Change

Item 0 to 0 of 0

ID	Description	Type	Product Group	Advertiser / Brand	Start Date	End Date	Rep(s)	Status	Campaign P.O. Number	Net Amount

-- No Records Returned --

1

Page: 1 of 1

Go

Page size: 50

Change

Item 0 to 0 of 0

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.

EDITING CAMPAIGN 1542

Campaign Explorer

Campaign Setup

Line Items

Material Management

Campaign Budget

Campaign Custom Data Forms

Digital Serving Analysis

Co-op Billing

User Defined Fields

Notes / Comments

Revenue Allocation

Production Contacts

Teamwork Contacts

Generate Proposal / Confirmation

Attachments

Invoices & Payments

Rep Commissions

History of Changes

Go to Offer View

Go to Advertiser View

Campaign Setup

Other Information

Other Information

I.D. Received

Entered On

Entered By

Confirmed Date

Import ID

Salesforce Opportunity ID

Default Territory

Override Territory

Renewal from Campaign ID

Renewal to Campaign ID

Sales Rep Assignments

Original Sales Rep(s)

Order Sales Rep(s)

Brand Sales Rep(s)

Ad Server Teams

Linked Ad Servers

Space Holder Ad

Component Lines

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

Max Component Count

4

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

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

EDITING COST PER COLUMN-INCH LINE: 4899

Line Details

Creatives / Materials

Production Notes

Other Options

User Defined Fields

Category MetaData

Rep Assignments

Affidavits

Other Settings

Placement Options

Other Settings

Custom Data Form

External Project URL

Marketing Content Template

Line Item P.O. Number

Override Tax

Replace Price on Invoice

Split Run

Production Link

Space Holder Campaign ID

Number of Tearsheets to Supply

Affiliate Publisher

Affiliate Commission

Placement Options

Page Priority

Quadrant

Page Position

Requested Page Number

Position is Guaranteed

Internal Comment

https://open.gitbook.com/~space/OT1DAUCrH1xx7fWgMFM0/~changes/BJoolu5jNKtRVtUHYJJJ/~gitbook/pdf?back=false&only=yes&page=zfhZce2bBn...

19/59

And when all the spots have been taken:

Other Settings

Custom Data Form

External Project URL

Go to External Project

Marketing Content Template

Line Item P.O. Number

Override Tax

Replace Price on Invoice

Split Run

Production Link

Space Holder Campaign ID

Number of Tearsheets to Supply

Placement Options

Page Priority

Quadrant

Page Position

Requested Page Number

Position is Guaranteed

Internal Comment

Campaign ID	Description	Product Name	Start	End	Status	Total Spots
No Items Found						

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.

BULK UPDATE CAMPAIGN STATUS

Product Group from Campaign

Sales Rep

Status Codes

Campaigns Running on or After

Campaigns Running on or Before

Get Data

ABC - Kelly's Co. (ABC)

Quote 1- Early Pipeline (26%) (Q1), Quote 2 - Proposal sent (49%) (Q2), Quote 3 - Negotiating (79%) (Q3)

4/10/2023

5/31/2023

Campaigns

Configure Output

Bulk Change Status

Drag a column header and drop it here to group by that column

ID	Advertiser	Agency	Earliest Close Date	Current Status	Credit Controller	Client Balance	Net Amount	Campaign Balance	Cash on Account	Credit Limit	Credit Limit Exceeded	Credit Age	P.O. Number	Prepayment is required	Has lines that start in the past	Oldest Unpaid Invoice in days	Max days overdue	New Status
12345	Central Music		5/15/2023	Quote 1- Early Pipeline (26%)		-7,500.00	4,000.00	4,800.00	0.00	99,999,999.00							250	
12442	Underwater World Horsham		5/7/2023	Quote 1- Early Pipeline (26%)	Kelly Smith (USER KSMTH)	800,879.46	219.60	219.60	5,000.00	1,000,000.00						450	120	
12381	Tommy Hilfiger		5/1/2023	Quote 1- Early Pipeline (26%)		9,494.15	850.00	892.50	0.00	2.00						6,413	0	
12390	Tommy Hilfiger		4/30/2023	Quote 1- Early Pipeline (26%)		9,494.15	3,400.00	3,400.00	0.00	2.00						6,413	0	
12393	Underwater World Horsham		4/30/2023	Quote 1- Early Pipeline (26%)	Kelly Smith (USER KSMTH)	800,879.46	15.00	15.00	5,000.00	1,000,000.00						450	120	
12441	Underwater World Horsham		4/30/2023	Quote 1- Early Pipeline (26%)	Kelly Smith (USER KSMTH)	800,879.46	15.57	15.57	5,000.00	1,000,000.00						450	120	
12443	Underwater World Horsham		4/30/2023	Quote 1- Early Pipeline (26%)	Kelly Smith (USER KSMTH)	800,879.46	84.24	84.24	5,000.00	1,000,000.00						450	120	

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:

QUICK LINE ENTRY

Select a Package (this will first clear the grid): Navigator Gold Package

Or Copy from Campaign (this will first clear the grid):

Package Display Name: Navigator Gold Package

or Select a Product: Select a Product

-- and an Ad Type: Select an Ad Type

-- And a Rateline (this will add a line to the top of the grid): Select Rate Line

Lines	Category MetaData	Notes							
Delete All Lines	Book All Issues	Default Pricing Contract: Discount Percent: 0.00000 % of Net							
Delete	Product	Ratecard / Edition	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
✖	The Navigator Website NAV1	1	2 Open CPM Rate <i>Ad Server Override Description</i> VIEW PRODUCT INFORMATION	News	7/1/2023 8/31/2023	CPM	50,000 CHECK INVENTORY	13.00000 EFFECTIVE RATE 13.00000 RATECARD RATE	650.00
✖	The Navigator Times NAV13	39	264 Color Display - Column Full Color-CMYK VIEW PRODUCT INFORMATION	A-News Section Run of Section	7/1/2023 Multi-Select	PCOL	0.000 TOTAL COLUMNS 0.00 COLUMNS 0.00 INCHES CHECK INVENTORY	100.00000 EFFECTIVE RATE 100.00000 RATECARD RATE	0.00
✖	Navigator Magazine NAV12	52	371 1/2 Page (H) (Mag) Full Color-CMYK VIEW PRODUCT INFORMATION	Right Hand Page	7/1/2023 Multi-Select	PMOD	1 CHECK INVENTORY	8,000.00 EFFECTIVE RATE 8,000.00	8,000.00

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

BOOKING WIZARD

Product Selection Category MetaData Create Material Adjustments Price Breakdown **Book & Pay**

PACKAGE DISPLAY NAME	BILL-TO ID	BILL-TO NAME	TAKE PREPAYMENT	FIRST RUN DATE	TOTAL AMOUNT DUE
Navigator 2 Weeks, 30 C	100076	The Coca Cola Company	No	Saturday, July 1, 2023	0.00

Product Summary	First Run Date	Last Run Date	Total Days Running	Total Price	Tax Amount	Total with Tax
The Navigator Website NAV1	7/1/2023 SATURDAY	7/30/2023 SUNDAY	1	0.000	0.000	0.000
The Navigator Daily News NAV10	7/2/2023 SUNDAY	7/9/2023 SUNDAY	2	0.000	0.000	0.000
The Navigator Times NAV13	7/2/2023 SUNDAY	7/9/2023 SUNDAY	2	0.000	0.000	0.000
Navigator Weekender NAV17	7/2/2023 SUNDAY	7/9/2023 SUNDAY	2	0.000	0.000	0.000
			7	0.000	0.000	0.000

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):

Advertising Orders															
Check Incentives		Selected Line(s) Options		Numbers in the Grid											
				Display Estimated Net Amounts											
	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jul 2023	Aug 2023	---	---	---	---	Total	Ratecard Price Variance %
☐	5497	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	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	Navigator Magazine Package: Navigator Gold Package 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%

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 accomplished by selecting the rows to be changed and then select the line option dropdown and pick Change Package Name

Advertising Orders															
Check Incentives		Selected Line(s) Options		Numbers in the Grid											
				Display Estimated Net Amounts											
	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jul 2023	Aug 2023						
☒	5497	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						
☒	5498	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						

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: 3rd 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: BHP 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



PackageGroupingConfirmation_flexible.txt

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



Package_Performance_Invoice.txt



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

19

PREVENT CHANGES ON MATERIAL ATTACHED TO PAST ORDER LINES



Yes

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

EDITING FLAT FEE LINE: 20204

Contract

Edition(s)

Ratecard

Display Advertising

Ratecard Line ID

502

Description

1 Page

Lines / Page Eq.

420

1.000

Color

Section

News Section

Position

Run of Press

Target Demographic

Adjustments

-193.00000

Adjusted Flat Fee

6,473.66667

Total for all Issues

Total Amount

58,263.00

Estimated Tax

0.00

Estimated Total

58,263.00

Line Details

Zones

Adjustments

Proportion Values

Day/Date Rates

Select Issue Date(s) to add

Multi-Select

Day	Issue Date	Available	Billing Amount	Material	Production Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Sunday	1 January 2023	☒	7,283.00	Material ID: 4112	7		STR1151701		☐	✕
Sunday	8 January 2023	☒	7,283.00	Material ID: 4112	7		STR1151701		☐	✕
Sunday	15 January 2023	☒	7,283.00	Material ID: 4112	7		STR1151701		☐	✕
Sunday	22 January 2023	☒	7,283.00	Material ID: 4112	7		STR1151701		☐	✕
Sunday	29 January 2023	☒	7,283.00	Material ID: 4112	7		STR1151701		☐	✕
Wednesday	31 May 2023	☒	4,855.00	Material ID: 4112					☐	✕
Sunday	4 June 2023	☒	7,283.00	Material ID: 4112					☐	✕
Tuesday	6 June 2023	☒	4,855.00	Material ID: 4112					☐	✕
Wednesday	7 June 2023	☒	4,855.00	Material ID: 4112					☐	✕

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.

MATERIAL ADD/UPDATE

Material Header

Material ID

4112

Refresh

Search

New

Date Received

Tuesday, December 13, 2022

Expires On

Material Type

Material for Print Delivery

Proof Date

Material Desc.

External ID

Advertiser ID

255128

Pickup from ID (or Copied from ID)

Advertiser Name

Underwater World

Sensitivity Code(s)

Life is Short... I'm going Diving!

https://dev.navigahub.com/ew/digit

Refresh Preview Image

Default

Local Components

Storage Type

File Name

Description

File Type

Set as Preview

Final

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.)

The screenshot shows the 'Material Management' interface. On the left is a sidebar with a tree view containing items like 'Campaign Setup', 'Line Items', 'Material Management' (selected), 'Campaign Budget', 'Digital Serving Analysis', 'Co-op Billing', 'User Defined Fields', 'Notes / Comments', 'Revenue Allocation', 'Production Contacts', 'Tearsheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', 'History of Changes', 'Go to CRM View', and 'Go to Advertiser View'. The main area has a header with 'Insertions' and 'Associated Material' tabs. Below the header are filters: 'Selected Size' (Full Page (BS)), 'Consolidate Issue Dates' (No), and 'Show Lines With Material ID' (Yes). A table lists materials with columns: Line ID, Product ID, Product Name, Issue Date, Pick-up Material, Material, Production Status, and Invoice ID. The table contains 10 rows of data for 'The Star Daily Newspaper' with various issue dates from January 1, 2023, to June 7, 2023. Some rows have a 'New' status and an 'Edit Material' link. At the bottom right are 'Cancel' and 'Save' buttons.

Status Code Security

The screenshot shows the 'Status Settings' interface. It has a header 'Status Settings' and a sub-header 'CAMPAIGN STATUS OPTIONS'. There are four numbered sections:

- 1 DEFAULT STATUS ON NEW CAMPAIGNS**: A dropdown menu set to 'Q1 - Proposal'. Below it is a note: 'New campaigns entered by this group will default to this status. The user may overwrite status and select from allowed list.'
- 2 DEFAULT STATUS ON NEW CAMPAIGNS WHEN PRE-PAYMENT IS REQUIRED**: A dropdown menu. Below it is a note: 'If prepayment is required, the Confirmed status is not immediately available when creating a new campaign. In this scenario, Campaign Entry will default to the first available Status Code. Setting this option will override the default, selecting this status code when prepayment is required and Confirmed status is not yet allowed.'
- 3 AUTO-APPLY CASH ON ACCOUNT WHEN CONFIRMING CAMPAIGNS**: A checkbox labeled 'No'.
- 4 DISALLOW CONFIRMED STATUS WHEN RENEWING A CAMPAIGN**: A checkbox labeled 'No'. This section is highlighted with a red box. Below it is a note: 'Set this flag to prevent users from setting status on renewed campaign to Confirmed.'

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:

PROCESS PAYMENT

ATTENTION
This client has NOT authorized Pre-Payment via Credit Card.

Amount to Pay	6,000.00	Card Number	
Bill-To Client	Marriott International, Inc	CVV	
Payment Type	Credit/Debit Card	Expire Date	MM/YY
Bank		Card Holder Name	
Card to Charge		Billing Address 1	
Card Type		Billing Address 2	
Description		Billing City	
Card Status		Billing State	
Last Charged		Billing Zip	
		Billing Country	
		Telephone	
		Email	

Process Payment Later **Process Payment Now**

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:

29

RESTRICT 'PAY NOW' AND 'PAY LATER' OPTIONS

Allow only 'Pay Now'

30

Allow 'Pay Now' and 'Pay Later' options

Allow only 'Pay Now'

Allow only 'Pay Later'

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:

CLIENT TYPE SETUP 

ID	Description	Create Bill-to in Order Entry	Inactive	
ART	Private Party	☐	☐	✕
AUC	Corporate Account	☐	☐	✕
LOC	Local Account	☐	☐	✕
NAT	National Account	☐	☐	✕
NONP	Non-Profit Account	☐	☐	✕
GOV	Government	☐	☐	✕
INACT	Inactive	☐	☐	✕
REAL	Real Estate Agency	☒	☐	✕
NEW ID	Enter a Description	☐	☐	+

Reset

Save

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:

NEW CAMPAIGN

Campaign Explorer

- Campaign
 - Campaign Setup**
 - Line Items
 - Material Management
 - Campaign Budget
 - Campaign Custom Data Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Production Contacts
 - Tearsheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes

Campaign Setup**Other Information**

Campaign ID

New Campaign Cancel New

Campaign Billing Type

Performance Campaign ▼

Campaign Description

Advertiser ID

21100873 🔍 +

Advertiser Name

Keller Williams Real Estate Montgomeryville

Advertiser Address

Keller Williams Real Estate Montgomeryville
601 Bethlehem Pike
Montgomeryville, PA 18936
Tel: (215)631-1900

Client Type

Real Estate Agency (REAL)

Brand

Keller Williams Real Estate Montgomeryvill ▼ +

Agency / Bill-to

(21100873) Keller Williams Real Estate M 🔍 +

View Credit Status

Billing Contact

Billing Address

Keller Williams Real Estate Montgomeryville
601 Bethlehem Pike
Montgomeryville, PA 18936
Tel: (215)631-1900

Product Group

Star Group ▼

Order Contact

▼

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 -

The use case for this is that you might 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:

CLASSIFIED TEMPLATES

Category Setup

- Classified Category Setup
 - Category Trees
 - Metadata Adjustments by Product
 - Metadata Adjustments by Group
 - Category Templates**
 - Classified Packages
 - Images

Category Tree Setup

Category Tree: Legals

Template ID: GRNPKG

New Template ID: GRNPKG

Template Description: First Words Green - Package

Categories Allowed: Leave Blank for All

Template Type: HTML

For use in Packages only ☒ Yes

Is Inactive: No

Product Pricing

Copy Pricing From Template: Select a Template Copy

Product	Format	Ratecard	Package
The Star Daily Newspaper DOMINGO	Newspaper (news)	Classified Advertising (96)	Classified Package Rate-Better (\$51)

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:

CLASSIFIED PACKAGE SETUP

Category Setup

- Classified Category Setup
 - Category Trees
 - Metadata Adjustments by Product
 - Metadata Adjustments by Group
 - Category Templates
 - Classified Packages**
 - Images

Classified Package Setup

Category Tree Legals

Package ID LEGALPKG

New Package ID LEGALPKG

Description Legal Ad Package

Order Entry Message

Product Group Star Group

Default Template Standard Legal - Package Rate

Other Optional Templates First Words Green - Package (GRNPKG)

Valid From 5/9/2023

Valid Through 12/31/2028

Flat Fee Package ☐ No

Flat Fee Amount

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

i 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

ID	Description
EMPCI	Employment Package
2022	2022
EMP2021	EMP 2021

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.

CLASSIFIED TEMPLATES

Category Setup

- Classified Category Setup
 - Category Trees
 - Metadata Adjustments by Product
 - Metadata Adjustments by Group
 - Category Templates**
 - Classified Packages
 - Images

Category Tree Setup

Category Tree: Employment

Template ID: NEW

New Template ID: **Copy**

Template Description:

Categories Allowed: Leave Blank for ALL

Template Type: HTML

For use in Packages only: ☐ No

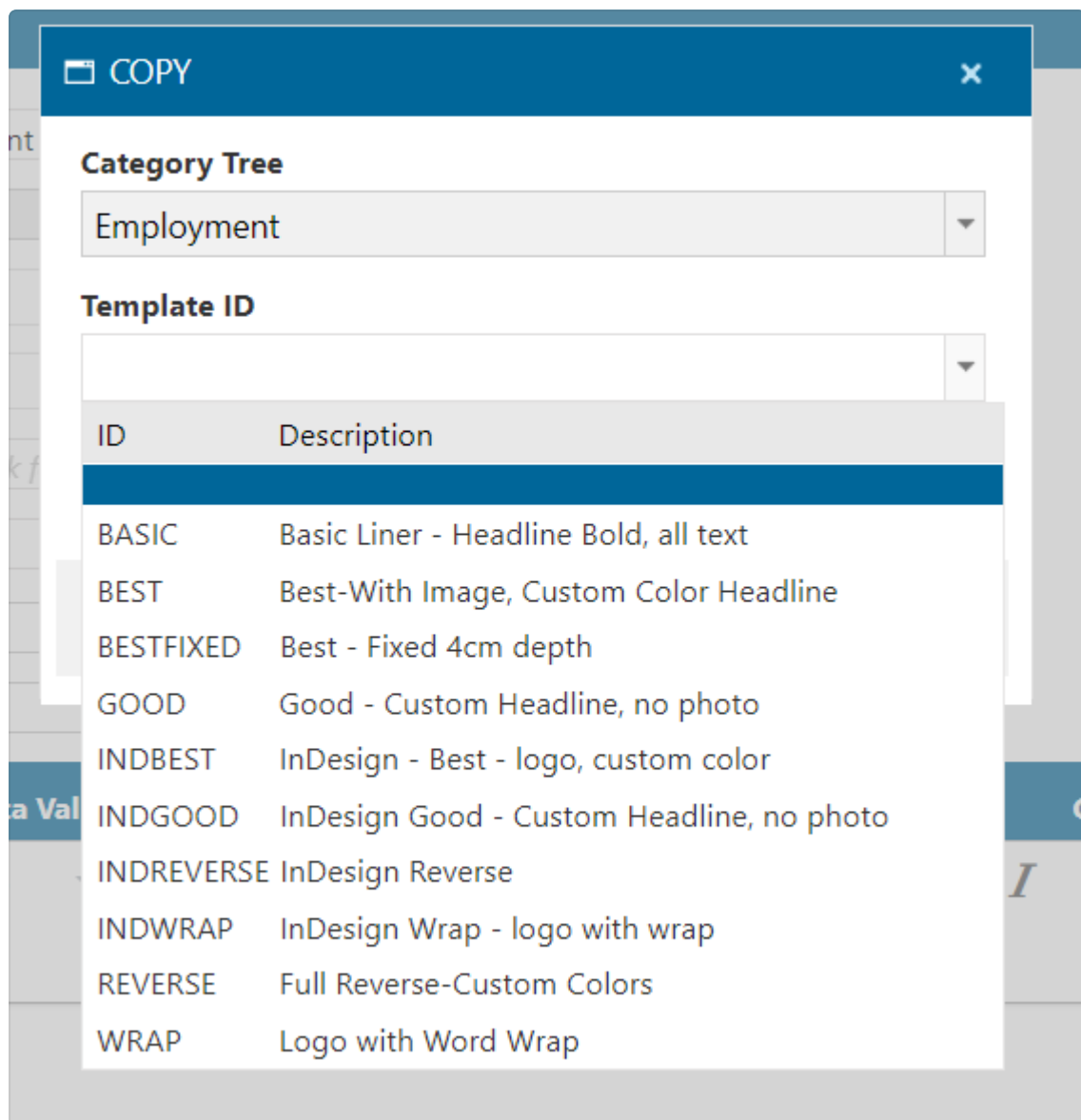
Is Inactive: ☐ No

Template Html | Sample Metadata Values | Sample Image | Group Pricing | Product Pricing | Clients

100% <> Font Sizes ADBASEPI A A Formats B I U

No Border

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).

EDITING COST PER THOUSAND LINE: 4837

Line Details

Creatives / Materials

Production Notes

Other Options

User Defined Fields

Category MetaData

Rep Assignments

Affidavits

Product

The Navigator Times

Size

Ad Type

Inserts

G/L Type

Print Display

Contract

Color

Edition(s)

Section

Ratecard

Retail Open Rates

Position

Ratecard Line ID

265

Target Demographic

Description

Inserts

Lines / Page Eq.

420

1.000

Pricing per Issue

Ratecard Rate

200.00000

Rate Adjustments

0.00000

Discount Rate

200.00000

Quantity

37,954

Rate per Insertion

7,590.80000

Rate x Qty Adjustments

0.00000

Price per Insertion

7,590.80

Total for all Issues

Billing Total Imps.

37,954

Billing Total Amt

7,590.80

Estimated Tax

0.00

Estimated Total

7,590.80

Line Details

Zones

Adjustments

Proportion Values

Evenly by Issue

Select Issue Date(s) to add

+

Multi-Select

Day	Issue Date	Available	Billing Imps.	Billing Amount	Material	Production Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Sunday	29 January 2023	☒	37,954	7,590.80				IN5238T		☐	

Preview of Final	Material	Line No.	Campaign	Advertiser	Artwork Status	Approval Status	Production Status Description	Issue Date	Line Desc.	Columns	Height in Inches	Page Eq.	Page No.	Campaign Status ID	Section	Position	Quantity	Ad Type	Production Notes	Primary Contact	Order Contact	Est. No.	Internal Comment
	2080	4765.24	1519	BMW of North America, LLC			Pickup/Camera Ready Rec'd	1/28/2023	Color Display - Column Inch	1,000	1,000	0.011		IS	Classifieds		1	Print Display, Col x in		Jonathan Davis			
	2080	4765.25	1519	BMW of North America, LLC			Pickup/Camera Ready Rec'd	1/30/2023	Color Display - Column Inch	1,000	1,000	0.011		IS	Classifieds		1	Print Display, Col x in		Jonathan Davis			
	2080	4765.26	1519	BMW of North America, LLC			Pickup/Camera Ready Rec'd	1/31/2023	Color Display - Column Inch	1,000	1,000	0.011		IS	Classifieds		1	Print Display, Col x in		Jonathan Davis			
	4837.1	1525		The Coca Cola Company			New Material to Come	1/28/2023	Inserts	0.000		1.000		IS			37,954	Inserts		Barb Navits			

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.

Restriction
Start Dates

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		
Issue Dates from	Issue Dates Through	
6/20/2020	6/20/2020	+
7/10/2021	7/10/2021	+
7/10/2025	7/10/2025	+
7/1/2023	7/2/2023	+

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.

Restriction
End Dates

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		
Issue Dates from	Issue Dates Through	
6/20/2020	6/20/2020	+
7/10/2021	7/10/2021	+
7/10/2025	7/10/2025	+
7/1/2023	7/2/2023	+
7/5/2024	7/10/2024	+
7/12/2024	7/15/2024	+

Published Day(s)

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.

Override
Layout ID

This is optional, but if used must match a Layout ID setup in Layout Maintenance. (Setup - > Advertising Setup → [Counn Layout Maintenance](#))



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

Zone Setup

Geocode Items

ID	Description	Sort Code		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Inactive
19401											
19401	19401 - Norristown	19401	Subscribers								☒
	DESCRIPTION		Non Subscribers								
	Norristown		Retail								
	GROUP		TOTAL CIRCULATION								
	US 19401										
	2-DIGIT POSTAL										
	ISO CODE										
	COUNTRY CODE										
	40.1245 -75.3304										
	LATITUDE LONGITUDE										

Add 1 New Line +

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.

Line Details Zones Adjustments				Use Grid to Select Zones			Use Map to Select Zones		
Zone Group				Subscribers	Non Subscribers	Retail			
Philadelphia Metro → Outer Suburbs → Montgomery County → Norristown → 19401 - Norristown → 29 January 2023				11,273	41,753	5,512			
Philadelphia Metro → Outer Suburbs → Montgomery County → Norristown → 19403 - Norristown → 29 January 2023				11,950	48,686	5,843			
Philadelphia Metro → Outer Suburbs → Montgomery County → Skippack → 19426 - Skippack → 29 January 2023				10,485	42,714	4,660			
Philadelphia Metro → Outer Suburbs → Montgomery County → Skippack → 19430 - Skippack → 29 January 2023				0	0	0			
Philadelphia Metro → Outer Suburbs → Montgomery County → Skippack → 19473 - Skippack → 29 January 2023				4,246	17,298	1,888			
Philadelphia Metro → Outer Suburbs → Montgomery County → Skippack → 19474 - Skippack → 29 January 2023				0	0	0			

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.

REVERSE CAMPAIGN INVOICING

Campaign Billing

- Campaign Billing
- Prepare Performance Billing
- Prepare Flexible Billing
- Generate Invoice(s)
- Print Invoice(s)
- Regenerate Invoice(s)
- Reverse Campaign Invoicing**

Campaigns with Problems

- Billing Schedule Issues
- Credit Issues
- Missing Actuals
- Credit Card Issues
- Campaigns Awaiting Credits

Reverse Campaign Invoicing

This process allows you to reverse all invoicing that has been done against a partially or fully billed campaign, producing a reversing credit. This will NOT cancel the campaign, nor will it affect any Ad Server integration.

The most likely use of this function is when the wrong party was billed and now needs to be credited.

After the campaign invoicing has been reversed, you can change the bill-to on the campaign entry screen.

Campaign ID

1556

CREDIT DETAIL ✕

Credit Period 2023-06

Credit Date 6/7/2023

Comment Billed to wrong account

Cancel
Save

Invoices to be Reversed

Invoice ID	Invoice Date	Paid	Amount	Tax	Balance	
IN4945T	1/31/2023	☐	11,200.00	0.00	11,200.00	☐
IN5011T	2/28/2023	☐	24,479.15	0.00	24,479.15	☐
IN5075T	3/31/2023	☐	27,297.64	0.00	27,297.64	☐
IN5155T	4/30/2023	☐	11,384.44	0.00	11,384.44	☐
IN5142T	4/25/2023	☐	13,150.00	0.00	13,150.00	☒

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



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](tel: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:

IMPORT ISSUES

Product Setup

- PRODUCT GROUP SETUP
- PRODUCT SETUP
 - Product Listing
 - Product Details
 - Material Handling
 - Audience
 - Demographics
 - G/L Overrides
 - GL Overrides Import
 - Tax Overrides
- PRICING RULES
 - Ratecards
 - Price Adjustments
 - Auto Adjustments
- SECTIONS & POSITIONS
 - Sections
 - Sections Import
 - Positions
 - Inventory by Position
 - Positions Import
 - Copy Sections/Positions
- ISSUE-BASED SETUP
 - Published Dates
 - Issue Configuration
 - Issue Import**
 - Issue Export
 - Issue Zone Configuration

Import Issues

Important Notes about the Excel Import Template:

- All columns in bold are required to be present in the spreadsheet when imported

File to Import

Overwrite Existing ☒ No

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

Issues Export

PRODUCT GROUP SETUP

PRODUCT SETUP

- Product Listing
- Product Details
- Material Handling
- Audience
- Demographics
- G/L Overrides
- GL Overrides Import
- Tax Overrides

PRICING RULES

- Ratecards
- Price Adjustments
- Auto Adjustments

SECTIONS & POSITIONS

- Sections
- Sections Import
- Positions
- Inventory by Position
- Positions Import
- Copy Sections/Positions

ISSUE-BASED SETUP

- Published Dates
- Issue Configuration
- Issue Import
- Issue Export**
- Issue Zone Configuration

Export Issues

Important Notes about the Excel Export:

- The data exported can be used with the Issue Import tool to update and/or add to the Issue Configuration.

Report by Group

Product Group Customer Demo (CUSTOM)

Issue Start Date 6/1/2023

Issue End Date 6/30/2023

Export

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

9

☐ No

10

AUTO APPROVE NEW CLIENTS

No

11

Prepayment Required for Advertising Orders

Prepayment NOT Required

12

Actuals Billing Method

Capped at Total Goal

13

ACTUALS RECONCILIATION

Use Third Party Numbers

14

CLIENT GROUP

Select a Group

14

GENERATE STATEMENTS

☐ No

Cancel

Save

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.

EXPIRING CAMPAIGNS

Product Group

Start Date

End Date

Exclude Quotes

UnBilled Only

Only Run Until Cancel

Naviga Product Group

6/2/2023

6/30/2023

No

No

No

Get Data

Expiring Campaigns

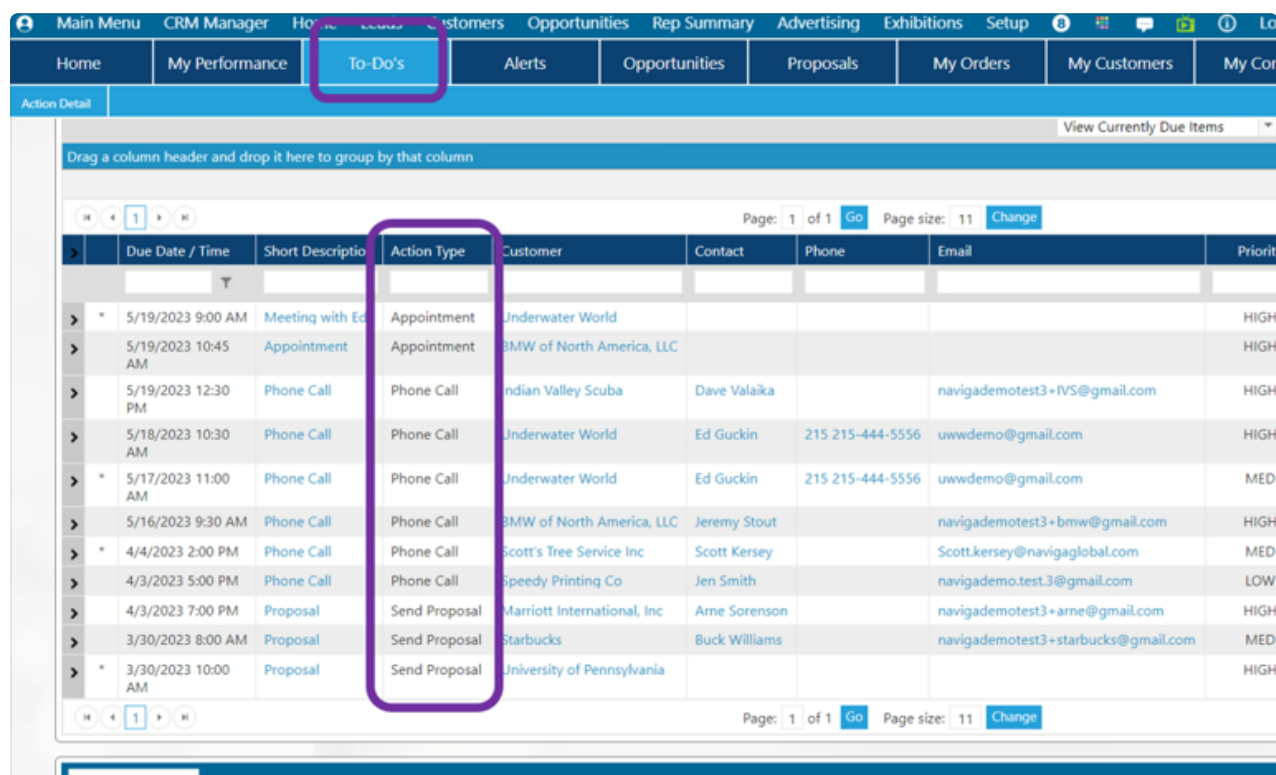
Drag a column header and drop it here to group by that column

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



	Due Date / Time	Short Description	Action Type	Customer	Contact	Phone	Email	Priority
> *	5/19/2023 9:00 AM	Meeting with Ed	Appointment	Underwater World				HIGH
>	5/19/2023 10:45 AM	Appointment	Appointment	BMW of North America, LLC				HIGH
>	5/19/2023 12:30 PM	Phone Call	Phone Call	Indian Valley Scuba	Dave Valaika		navigademotest3+ivs@gmail.com	HIGH
>	5/18/2023 10:30 AM	Phone Call	Phone Call	Underwater World	Ed Guckin	215 215-444-5556	uwwdemo@gmail.com	HIGH
> *	5/17/2023 11:00 AM	Phone Call	Phone Call	Underwater World	Ed Guckin	215 215-444-5556	uwwdemo@gmail.com	MED
>	5/16/2023 9:30 AM	Phone Call	Phone Call	BMW of North America, LLC	Jeremy Stout		navigademotest3+bmw@gmail.com	HIGH
> *	4/4/2023 2:00 PM	Phone Call	Phone Call	Scott's Tree Service Inc	Scott Kersey		Scott.kersey@navigaglobal.com	MED
>	4/3/2023 5:00 PM	Phone Call	Phone Call	Speedy Printing Co	Jen Smith		navigademotest3@gmail.com	LOW
>	4/3/2023 7:00 PM	Proposal	Send Proposal	Marriott International, Inc	Arne Sorenson		navigademotest3+arne@gmail.com	HIGH
>	3/30/2023 8:00 AM	Proposal	Send Proposal	Starbucks	Buck Williams		navigademotest3+starbucks@gmail.com	MED
> *	3/30/2023 10:00 AM	Proposal	Send Proposal	University of Pennsylvania				HIGH

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.

[-- Return to List of Opportunities](#)

ENTER/UPDATE OPPORTUNITY

Basic Information		Valuation	Dates
Opportunity ID // Copy 1465	Opportunity Type Advertising	Forecast Amount // Calculate 35,000	Currency Use System
Customer ID // Search 255078	Name Underwater World Horsham	Values for Reporting Use the Selected Proposal/Quote	Start Date Monday, May 1, 2023
Brand / Div. // Underwater World	Agency Name Ogilvy & Mather	Owned By Smith (USER KSMITH), Kelly	End Date Wednesday, May 31, 2023
Agency ID // Search 241022	Call List 	Stage Won	Expected Close Date Monday, May 1, 2023
Project Start Typing to Search	Advisor ID 	Probability 100 %	Created Date Wednesday, January 11, 2023
		Tags 	Age 105
		Created By Kelly Smith (USER KSMITH) (KSMITH)	

Group Security Changes

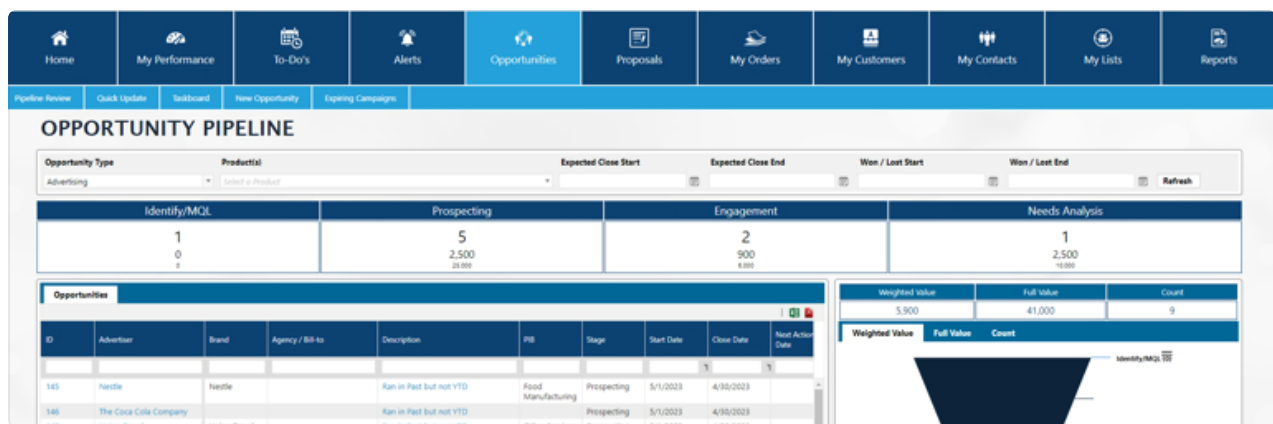
Opportunity Security

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.

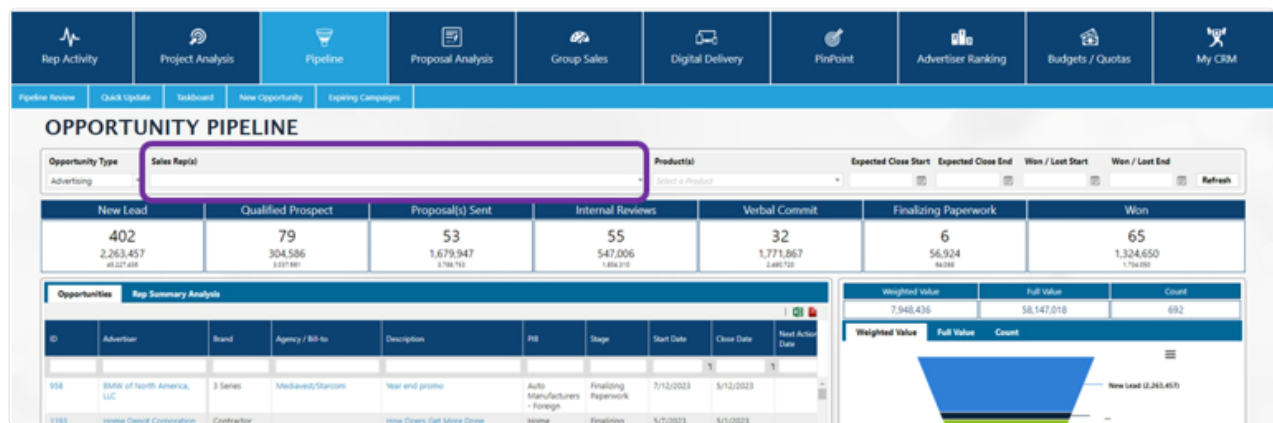
Opportunities	
OPPORTUNITIES TOP	
1	WARN USER ON SAVE IF OPPORTUNITY STAGE IS NOT CHANGED ☐ No
2	REQUIRE CLOSE DATE ☐ No
3	DISABLE PROBABILITY PERCENTAGE OVERRIDES ☐ No
4	ALLOW REP AND/OR REP GROUP SELECTION ON OPPORTUNITY QUICK UPDATE AND TASKBOARD ☐ No

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.

Leads Management

LEAD SETTINGS [TOP](#)

...

1

OPPORTUNITIES GENERATED FROM LEADS MUST BE ASSIGNED TO THE LEAD OWNER

☐ No

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.

Main Menu Customers Invoices Credit Control Payments Statements Reporting Setup Logout

A/R SYSTEM PARAMETERS

Period Control

Period Control

1

FIRST OPEN FINANCIAL PERIOD

2023-01

Enter Period in YYYY-MM format

2

LAST OPEN FINANCIAL PERIOD

2023-04

Enter Period in YYYY-MM format

3

ENFORCE DATE WITHIN OPEN FINANCIAL PERIOD

☒ Yes

A/R Parameters

A/R Parameters

1

SERVICE CHARGE PERCENT

10.00

2

SERVICE CHARGE CLASS

TEST CLASS CODE

3

DSO CALCULATION METHOD

Media Credit Association

4

FOREIGN CURRENCY INDICATOR

Allow a Client to be Billed in a Single Currency

History of Name Changes Report

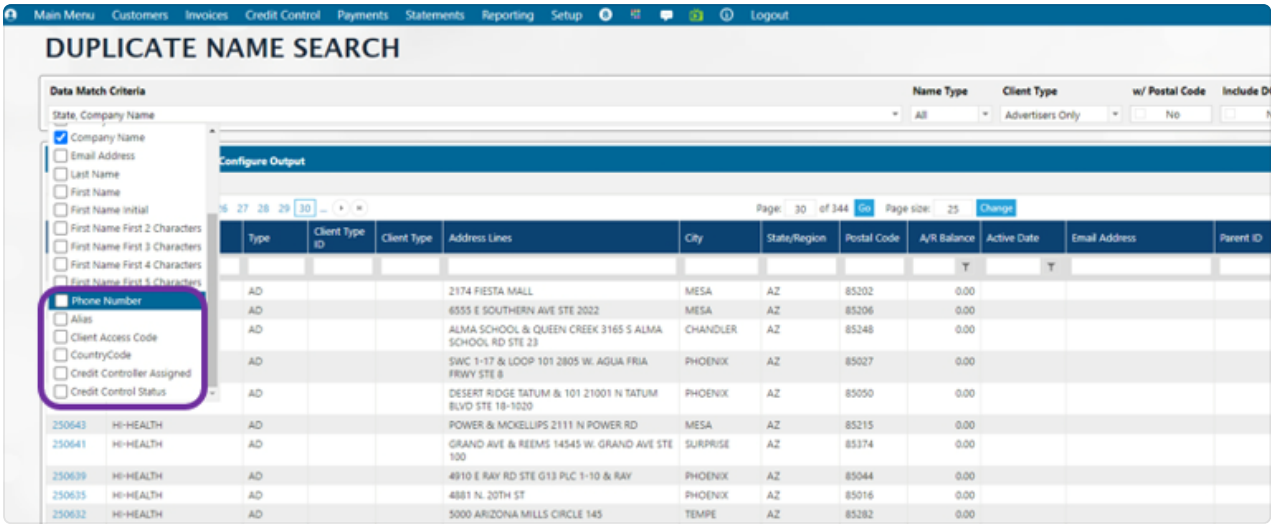
Navigate to A/R module → Customers → History of Name Changes. 4 new fields were added to the history of name change report.

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

<

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:

CARD TRANSACTION DETAILS

Transaction Reference		Transaction Summary	
Transaction ID	7927	Source	Internal
Transaction Type	Charge	Auth. Method	ElanPay Service
Bank	BANK AMERICA - NavPay: Paywa	Authorized On	4/7/2023 3:14 PM
Payee Name	The Coca Cola Company	Authorized By	Wayne Burrows
Module Source	AR	Settled On	4/7/2023 3:14 PM
Module Ref. ID	244386*2975.CC	Settled By	Wayne Burrows
Provider Ref. ID	5320230407171447207454	Released On	
Naviga Gateway Ref. ID	DEVDIGITAL5488603187	Purged On	
Auth/Settlement Code	5320230407171447207454	Manually Settled	No
Transaction Amount	150.00	Settled Amount	150.00
Status	Settled	Created On	4/7/2023 3:14 PM
Created By	Wayne Burrows	Last Changed On	4/7/2023 3:14 PM
Last Changed By	Wayne Burrows		

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"

Record Type: **Credit/Debit Card Payment**

A/R PAYMENT DETAILS

Select an Edit Option

Header		Financial Summary	
Customer	Round Guys Brewing Company	Financial Period	2023-05
Check/Payment ID	3058.CC	G/L Post Date	
Date on Payment / Check		Reconciled Date	
Payment from Bank		Batch No.	05/15/23CC
Payment Date	5/15/2023	Comment	From Auto-Clear Client Balance
Entry Date	5/15/2023		
Entered By	Kelly Smith (USER KSMITH)		
Deposit Bank	BANK AMERICA - NavPay: Payway Edgil		

	Local Currency	Foreign Currency
Amount	5,000.00	0.00
Allocated	5,000.00	0.00
Balance	0.00	0.00
	0.00	0.00

Other Information



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.

PROCESS PAYMENT

Amount to Pay

4,893.33

Bill-To Client

Underwater World

Payment Type

Credit/Debit Card

Bank

BANK AMERICA (NavigaPay Br

Card to Charge

411111*****1111

Card Type

VISA

Description

BANK AMERICA (NavigaPay Brair

Card Status

Active

Last Charged

Comment

paid via phone 5/18

Card Number

411111*****1111

CVV

Expire Date

12

2025

Card Holder Name

Underwater World Ed Guckin

Billing Address 1

495 Easton Rd

Billing Address 2

Billing City

Horsham

Billing State

PA

Billing Zip

19044

Billing Country

United States

Telephone

(215) 672-4180

Email

Process Payment Now

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		payment detail	
Account No.	255128	Payment/Receipt No.	2263.CC
Customer Name	Underwater World	Payment Date	5/18/2023
Payment Comment	PRE-PAYMENT FOR 11100035	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.

Disable Navigation

DISABLE NAVIGATION

This allows you to disable major areas of navigation in the portal and replace their content with a message

1

DISABLE SPECIALS

☐ No

2

DISABLE INVOICES

☐ No

3

DISABLE ORDERS

☐ No

4

DISABLE PROPOSALS

☐ No

5

DISABLE MATERIALS

☐ No

6

DISABLE FORMS

☐ No

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:

Category Setup	Online Options	Classified Stylesheet	Category MetaData	Validation	Formatting	Merge Tag	Required	
Level	Label/Question	Prompt Type						
Employment	Background Color	Color Code Allow in Self-Serve				BACKCOLOR	☐	✖
Employment	Text Color	Color Code Allow in Self-Serve				TEXTCOLOR	☐	✖
Employment	Send to Recruitology	True/False Prompt Hide in Self-Serve				RECRUITOLOGY	☐	✖
Employment	Recruitology.com Listing Type	Dropdown List Selection Hide in Self-Serve	☐ Multi-Select ☐ Allow Custom Text Standard, Premium, Spotlight			LISTINGTYPE	☐	✖
Employment	OwnLocal	True/False Prompt Hide in Self-Serve				OWNLOCAL	☐	✖
Employment	Start Date	Date Allow in Self-Serve			Short Format (Local)	STARTDATE	☐	✖
		Allow in Self-Serve					☐	✖

Add 1 New Lines +

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.)

Step 1 Ad Category Step 2 Booking Selection Step 3 Ad Information Step 4 Order Summary Step 5 Confirmation

1 WHAT KIND OF AD DO YOU WANT TO PLACE?

Welcome to the Navigator Daily online Classified system! You can use this system to create and submit an ad to run in our print and digital publications, including our newspapers, websites and mobile apps.

The first step is to select the type of Ad you would like to run from the options below.

Pick a Category ▼

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.

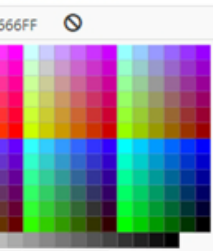
Please note - by default, this becomes a bright pink, so you WILL want to change it to something that matches your color scheme. This will be displayed as option #3 under the Override Color Scheme options. Navigate to Campaigns → Classified Self-Serve → Self-Serve Setup and scroll down to Color Configuration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

1. OVERRIDE COLOR SCHEME

The UI is based on a Material.io theme consisting of two primary colors. You can change the primary, secondary and/or application bar colors to adjust the site to more closely match your corporate colors. Leave these set to NO COLOR to use the default color scheme.

1

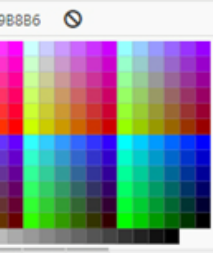
PRIMARY COLOR OVERRIDE



The Primary Color Override interface shows a color picker with a current selection of #6666FF. It includes a color grid, a color bar, and tabs for Web, RGB, HSB, and HSV.

2

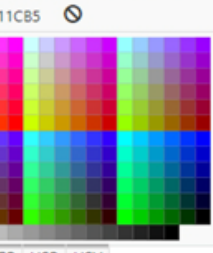
SECONDARY COLOR OVERRIDE



The Secondary Color Override interface shows a color picker with a current selection of #B9B8B6. It includes a color grid, a color bar, and tabs for Web, RGB, HSB, and HSV.

3

APPLICATION BAR COLOR OVERRIDE



The Application Bar Color Override interface shows a color picker with a current selection of #411CB5. It includes a color grid, a color bar, and tabs for Web, RGB, HSB, and HSV.

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.