

Release Guide

This document provides instructions for how to use the new features in the 2024.3 release, grouped by module. Remember to install & test in your test system before Production.



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

- [Insert/Trigger Change History](#) - this one isn't a disruptive change or anything, but you might want to ensure that users are aware that this is available to them, especially if you are a site using Interface Link to send feeds to various systems.
- For those of you who have expressed an interest in disabling the new feature introduced in 24.1 on making future rep changes - that is now possible. Please see [below](#) for details on enabling that option.
- There is a [new prompt](#) for the desired Quote status when converting Opportunity lines into Order Lines. Not a terribly disruptive change either, but a new prompt that users might not be expecting unless they are advised of the change.
- **Important notice for AdCellerant users:** Effective July 1, 2024, AdCellerant has changed their API, which necessitated us changing the way we are integrating with them. From a workflow perspective in Naviga Ad, it isn't a drastic change for the end-user, but if you already had AdCellerant setup prior to 2024.3, please revisit the setup section to review and re-save the product cross reference. AdCellerant changed some of their product catalog with their API changes, so you will need to re-map some of the AdCellerant products to their applicable Naviga products. **The integration will no longer work with Naviga versions prior to 2024.3, so please plan upgrades accordingly.**

Advertising Module

UpVote Additional Fields on Tickets Dashboards

On both the Adjustments Tickets and Campaign Tickets dashboards, the Brand ID and Brand Name have been added as optional columns for the onscreen view and the excel download. Navigate to **Campaigns -> Campaign Tickets Dashboard** or to **Campaigns -> Adjustment Tickets Dashboard** to access these reports and then select the configure output tab to add/remove desired columns.

Insert/Trigger Change History

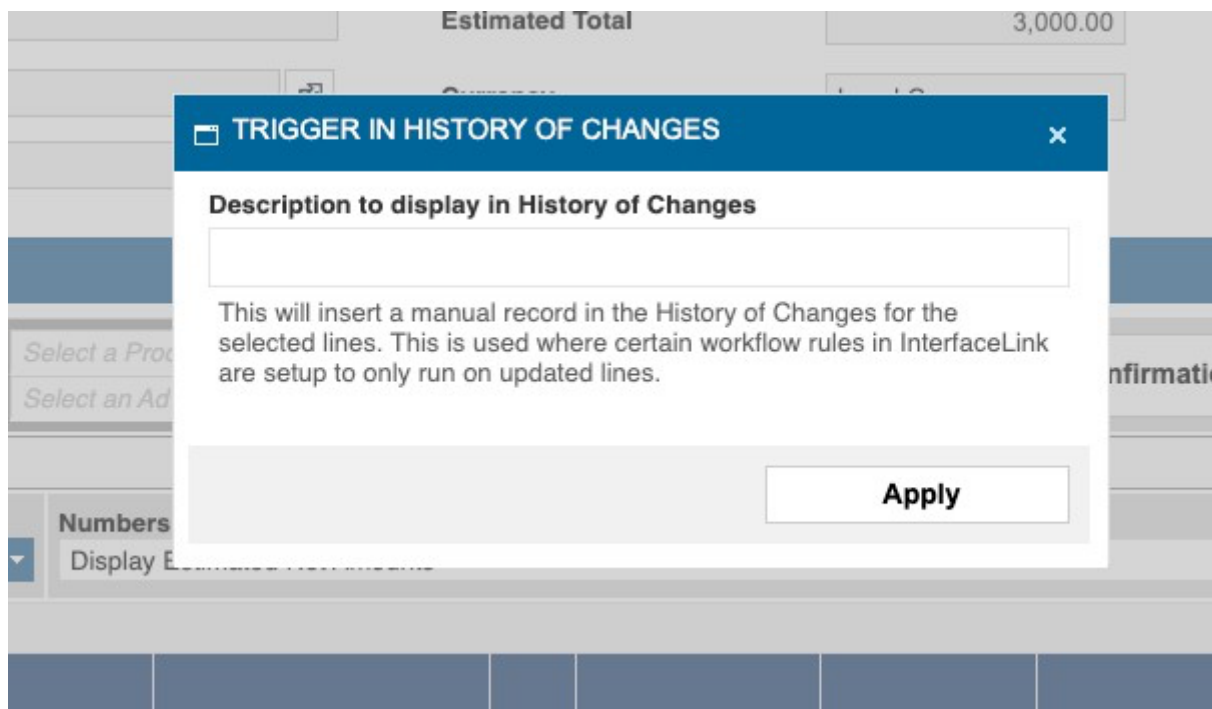
Interface Link (IL) is often triggered on changes to a campaign line. It is watching the History of Changes tab, and when a new change is recorded, IL will look at the affected Line ID and will send/re-send the affected lines to downstream systems.

Sometimes, users need to re-send items to Interface Link manually for a variety of reasons. We have added an option on both the Campaign Line Item, and the Material Record, to trigger a manual history entry. This saves the user the hassle of opening the line and making a fake change just to trigger the feed.

On the line item, the function is accessed here:

Booking Wizard	Quick Line Entry	Select a Product Select an Ad Type
Advertising Orders		
Check Incentives	Selected Line(s) Options 	Numbers in the Grid Display Estimated Net A
☐ ID	Split Selected Lines Delete Selected Lines Update GAM Targeting Change Package Name Price Change - Bottom Line Override Insert/Trigger Change History	Description
☐ 6784	The Navigator Daily News Size: 1/4 Page (BS) (4.832 x 10.5) Section: Main Position: ROS Edition: West	1/4 Page B&W

The user can select one or more line items and then select the Insert/Trigger Change History. A dialog box will open with a prompt for the user to enter a comment for the change



Any comment will be added to the History of Changes in a new "Comment" column, which will only be seen when there is a comment in there.

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CAMPAIGN CHANGE HISTORY

Campaign Explorer

- Campaign Setup
- Line Items
- Optimize Digital Lines
- Material Management
- Campaign Budget
- Campaign Custom Data Forms
- 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
- Go to Advertiser View

History

Campaign ID: 2096
Advertiser: Lansdale Tavern
Brand: Lansdale Tavern
Agency:
Status: Confirmed

Start Date: 6/30/2024
End Date: 7/28/2024
Net Amount: 2,917.12

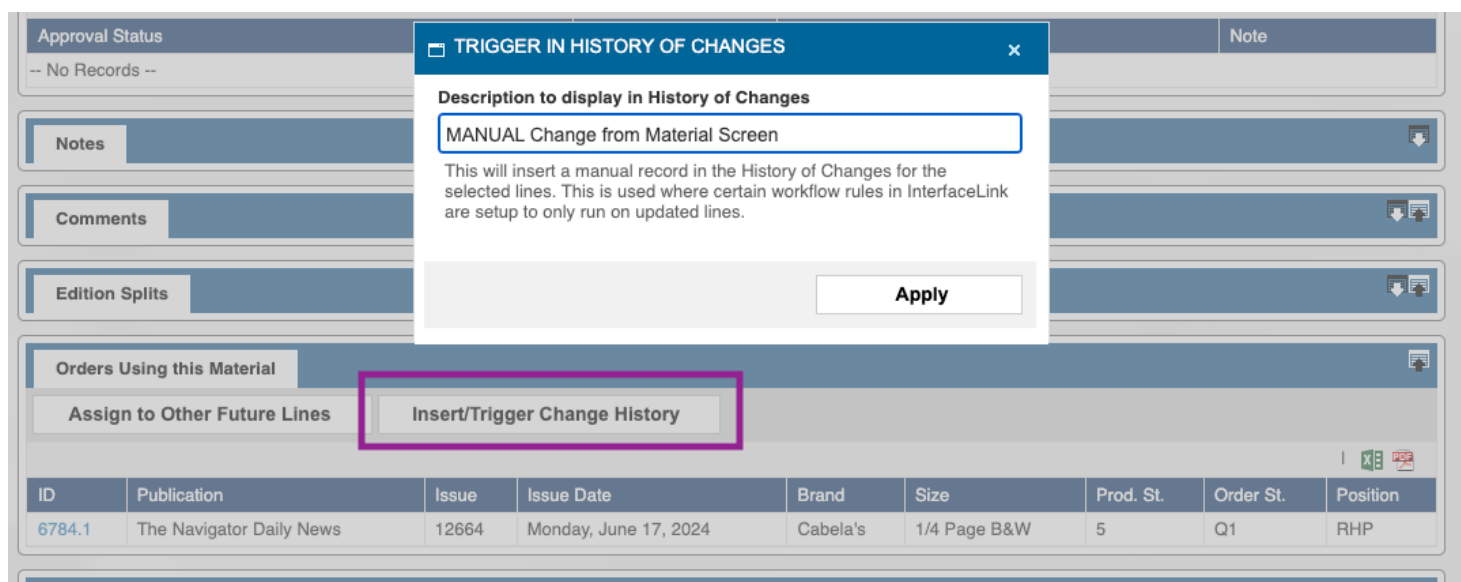
History of Changes

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

Record Type	Add / Change / Delete	Comment	Line ID	Date/Time	Changed By	Field(s) Changed	Original Value	New Value
Line	CHANGE	Comment on Manual History update	6788	Wednesday, June 12, 2024 11:16:06 AM	Kelly Smith			
Line	ADD		6790	Monday, June 10, 2024 11:08:38 AM	Kelly Smith			The Navigator Times
Line	ADD		6789	Monday, June 10, 2024 11:08:06 AM	Kelly Smith			The Navigator Times
Line	ADD		6788	Monday, June 10, 2024 11:06:36 AM	Kelly Smith			The Navigator Times
Campaign	ADD			Monday, June 10, 2024 10:54:50 AM	Kelly Smith			

NAVDIA™ 2024.3
Build 240612.0133
ACCOUNT: DEM
YOU ARE LOGGED IN AS: Kelly Smith (KSMITH)
SECURITY GROUP: CLIENTS
LANGUAGE: English (en-US) (Browser Default)
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Similarly, on a material record, the user will also have the same option and prompt. This can be used when a material is edited directly in Material Maintenance, rather than through the line item.



When changing from the material record, a single material could potentially be used on multiple order lines across multiple campaigns. The trigger will update all campaigns' order lines **with issue dates of today or later**. It will not affect items in the past.

Additional fields on the Brands by Agency Report

Navigate to **Customers -> Brands -> Brand Assignment by Agency**. The Advertiser ID and the Brand ID have been added to this report. Clicking on the Advertiser ID will take the user to Name Maintenance with this advertiser opened, and the Brand ID Link will take the user to the Brand Maintenance screen, with the Brand opened.

Advertiser ID	Advertiser	Brand ID	Brand
100008	Glaxo Smith Kline	A1	Advair
100038	Johnson & Johnson	A1	Baby Products
100057	BMW of North America, LLC	A1	5 Series
100076	The Coca Cola Company	A2	Diet Coke
100163	Speedy Printing Co	A1	Kellogg Dr Location
100163	Speedy Printing Co	A2	West Street Location

NAVIGA™ 2024.3
Build 240606.0133

ACCOUNT
DEM

YOU ARE LOGGED IN AS
Kelly Smith (KSMITH)

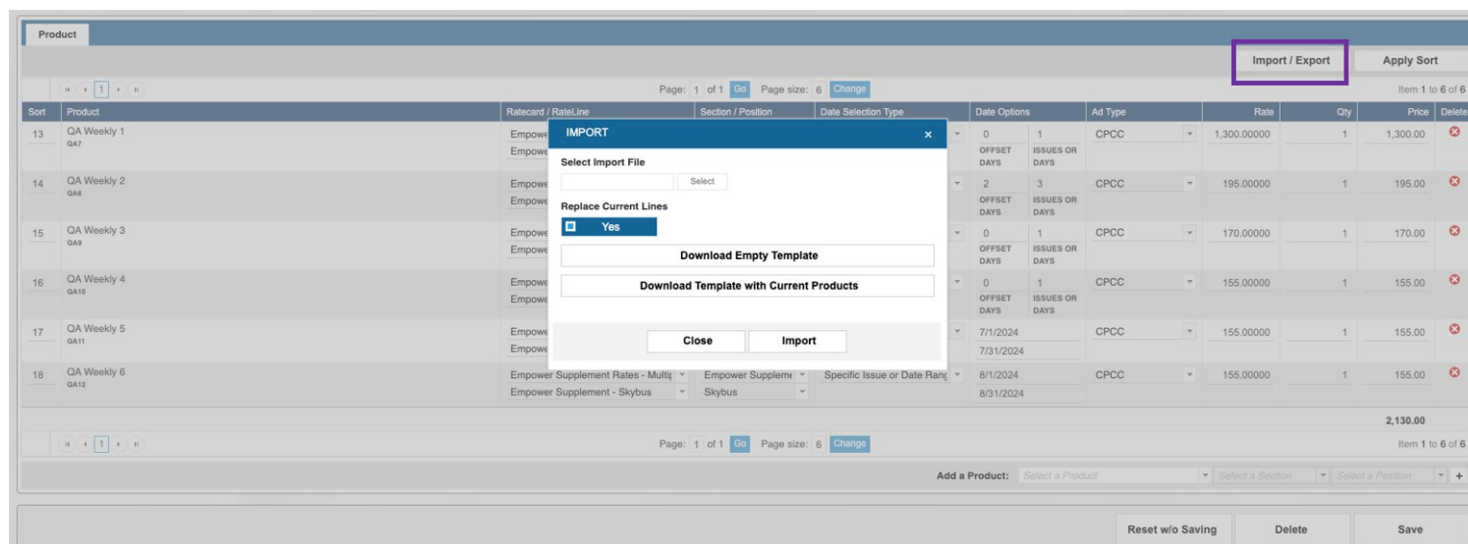
SECURITY GROUP
CLIENTS

LANGUAGE
English (en-US) (Browser Default)

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Option to Import order lines on Quick Line Entry Package Setup

For some of our clients, Quick Line Entry Packages are long and complex with many line items (hundreds of lines), so creating and maintaining packages were rather complex without an import option. So now admins can set up packages using an import for the line items.



At the top right there is a new import/export option. Once clicked, the above dialog box opens.

For existing packages, select Download Template with Current Products. To start from scratch, select Download Empty Template. An excel template will download. the following fields are available in the Template:

Field	Example	Description	Mandatory?
Product ID	DEMO10	This is the alpha-numeric ID of the Product	YES
Ratecard ID	17	This is the ID of the ratecard to be used. Technically not required to complete the import, but if the product is set to require a ratecard, the user will not be able to complete the order without selecting it, so it is recommended to set it here.	No, but recommended
Rate line ID	1245	This is the ID of the rate line to be used. Technically not required to complete the import, but if the product is set to require a ratecard, the user will not be able to complete the order without selecting it, so it is recommended to set it here.	No, but recommended
Section ID	NEWS	Alpha-numeric ID for the Section to be used for this line. Similar to rates, this isn't required to complete the import, but if you require sections on the product, or if the package is section-specific, it is recommended to select it here.	No

Position ID	ROS	Alpha-numeric ID for the Position to be used for this line. Similar to rates, this isn't required to complete the import, but if you require positions on the product, or if the package is section-specific, it is recommended to select it here.	No
Date Selection Type	FROM_CAMPAIGN_START	Options include: FROM_CAMPAIGN_START FROM_PREVIOUS_LINE [BLANK] Leaving the option blank will select "Specific issue or date range"	No
Day of Week Restriction	Sunday,Tuesday	Enter one of more Days of the Week, separated by a comma if this package line is only valid for certain days	No
Start Date	7/1/2024	Start date for the campaign line, if this package is for specific issues/dates. (only relevant if the Date selection type is blank.	Yes, if Date Selection Type is Blank. Otherwise, no.
End Date	7/31/2024	End date for the campaign line, if this package is for specific issues/dates. (only relevant if the Date selection type is blank.	Yes, if Date Selection Type is Blank. Otherwise, no.
Offset Days	2	Only Relevant if the Date selection type is FROM_CAMPAIGN_START or FROM_PREVIOUS_LINE. This sets the number of days from the start or previous line that this line will begin	Yes, if Date Selection Type is NOT Blank. Otherwise, no.
Issues or Days Count	1	Only Relevant if the Date selection type is FROM_CAMPAIGN_START or FROM_PREVIOUS_LINE. This will set the number if issues to be booked for this line.	Yes, if Date Selection Type is NOT Blank. Otherwise, no.
Ad Type ID	CPCI	This sets the ad type for the Line. This is an alpha0numeric field and Must match the ID of an Ad Type already set up in the system	YES

Once the template is filled out with desired data, the user can select the file in the Import/Export dialog window.

User can select "yes" to replace current lines to have the import delete what is currently offered on the package and use the imported lines instead. User can select "no" to replace current lines and these imported lines will be ADDED to the package.

Option to Display Brand Rep on Campaign Header

The following option has been added to the Advertising System Parameters (Setup -> Admin -> System Parameters):

when an individual line item that was originally created via Quick Line Entry of

18

DISPLAY BRAND REP ON CAMPAIGN SETUP SCREEN

☐ No

Default setting will be set to No, so that the system will behave as it always has, and the Brand Rep will be displayed only on the "Other Information" tab on the Campaign. If this is set to "Yes" then the Brand rep will also be displayed on the Campaign Setup tab.

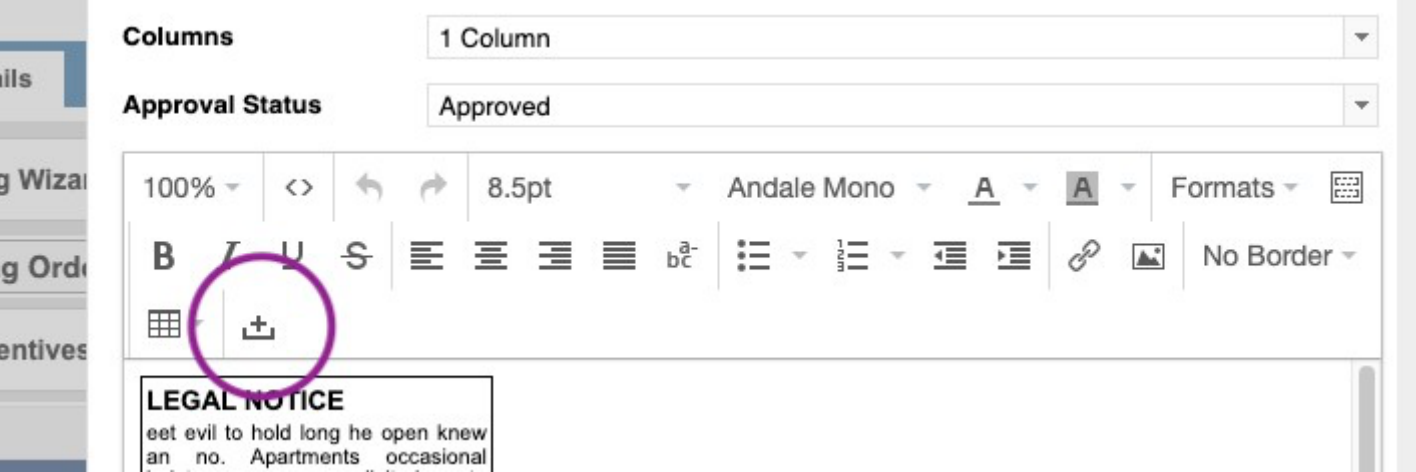
Campaign ID	New Campaign	Cancel New	Start Date						
Campaign Billing Type	Performance Campaign		End Date						
Campaign Description			Run until cancel	☐ No					
Advertiser ID	255128	+	Gross Amount	0.00					
Advertiser Name	Underwater World		Commission Amount	0.00					
Advertiser Address	Underwater World 495a Easton Rd Horsham, PA 19044 Tel: (215)672-4180		Net Amount	0.00					
Client Type	Local Account (LOC)		Estimated Tax	0.00					
Brand	Underwater World	+ -	Estimated Total	0.00					
Agency / Bill-to	(255128) Underwater World		Currency	Use System Default					
	View Credit Status		Default Discount %	0.00					
Billing Contact	Ed Guckin		Auto Payment Method	Select Auto Payment Method					
Billing Address	Underwater World 495a Easton Rd Horsham, PA 19044 Tel: (215)672-4180		Default Contract	Manage Payments On File					
Product Group	Star Group		Payment Terms (Default)	NET 30 DAYS					
Order Contact			Status	Q1 - Proposals					
Production Controller	Wayne Burrows		Project						
Campaign Manager			Call List						
Brand Sales Rep(s)	<table><thead><tr><th>Name</th><th>Comm. %</th></tr></thead><tbody><tr><td>Kelly Smith</td><td>100.00%</td></tr></tbody></table>		Name	Comm. %	Kelly Smith	100.00%	Industry Code	Retail - General	
Name	Comm. %								
Kelly Smith	100.00%								
		Sensitivity Code(s)							
		Default Artwork Type							
		P.O. Number							
		Customer Ref. No.							
		External Campaign ID							

This will display the rep who is the DEFAULT Rep on the brand, or the Product GROUP Rep on the brand. It cannot display the Product rep, as products are not on the header - they are on the line items.

This also will not adjust for future rep assignments after the campaign dates are entered - it will show the current Brand Rep.

New Icon in Classified Text Editor

This was a late addition to 24.3 and was patched back to 24.2 (Available in the weekend patch after July 6, or nightly patch starting July 1) . This new icon is used to add a non-breaking space between two words.



To use this, remove the space between the words and then click this icon when the cursor is where you would like the non-breaking space to be added.

New field on Campaign Header

There is a new dropdown field on the campaign header for External Source:

P.O. Number	
Customer Ref. No.	
External Campaign ID	
External Source	Column Import iPublish Imports g Costs
Invoice/Form Detail Level	
Marketing Content Template	
Signature Received	☒ Yes

The external source is defined in **Setup -> System Tables Setup -> External System ID Codes**.

When importing campaigns from 3rd parties it is common on the campaign header to reference the External System's Campaign ID, so that it can be used for cross-referencing with the other system. Previously, the External Source was stored on the campaign, but only under the hood and not displayed on screen. We now have included it on screen so that the user can understand what system the order originated from.

Find and Re-Send Affidavits easily

You can now find the most recent 150 affidavits belonging to a customer right on their account summary screen, so that they can be re-sent easily. There is a convenient filter row at the top to find the affidavit needed, if you have details like a contact, line id, or campaign id; and the columns are sortable if that is easier for finding what you are looking for.

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Rep ActivityProject AnalysisPipelineProposal AnalysisGroup SalesDigital DeliveryPinPointAdvertiser RankingBudgets / QuotasMy CRM

Go to Account SetupAdd a Contacted NoteAdd an Internal NoteApply a Credit

OPEN INVOICE AGING

	0-30	31-60	61-90	91-120	121+	COA	Pre-Payments	Balance
By Due Date	---	---	---	---	---	---	---	---
By Invoice Date	---	---	---	---	---	---	---	---

View by Currency

Open InvoicesPaid InvoicesTransferred InvoicesPaymentsCard TransactionsStatementsAffidavits

Email Selected Documents

Affidavit ID	Campaign ID	Line ID	Advertiser ID	Advertiser Name	Contact Name	Contact Email	Date	Delivery Method	View PDF	
77	100115	100237	253367	LAW OFFICE GORDON & GORDON,P.C	Kelly Smith	kelly.smith@navigaglobal.com	11/1/2023	Email		☐
76	100113	100235	253367	LAW OFFICE GORDON & GORDON,P.C	Kelly Smith	kelly.smith@navigaglobal.com	10/27/2023	Email		☐
75	100108	100228	253367	LAW OFFICE GORDON & GORDON,P.C	Kelly Smith	kelly.smith@navigaglobal.com	10/14/2023	Email		☒
74	100108	100227	253367	LAW OFFICE GORDON & GORDON,P.C	Kelly Smith	kelly.smith@navigaglobal.com	10/14/2023	Email		☒

To access the affidavits, open the customer account screen and navigate to the Accounting Tab. In the shutter with invoices and statements, there is now a tab for Affidavits. Select the pdf icon on any affidavit to open the pdf in another tab if it is desired to print and mail the affidavit. If the client would like an emailed affidavit, user can select one or more to send and then click the email selected documents. Similar to re-sending invoices, this will open the email dialog with the affidavits as attachments. User can select an email address to send to from available contact people on the account, or they can manually enter a different email address if the recipient is not a contact person. Templates can be setup in Document Templates (Customer Service - Templates) section. These are the same templates used in collection letters.

Option to Disable Future Rep Assignments

In 2024.1, we introduced the ability to set a future date for rep assignments. This was a crucial go-live requirement for one of our customers. Well - turns out it was NOT something that several other clients desired. So, by popular demand, that is now an option which can be enabled or disabled in the Advertising System Parameters. Navigate to **Setup -> Admin -> System Parameters**. In the Sales Rep Settings section, there is a new option:

Sales Rep Settings

SALES REP SETTINGS

1

REP. COMMISSIONS - POST ZERO AMOUNTS

☐ No

When the system updates the Sales Rep commission file, do you want to include any lines that have zero amounts? Examples of zero lines – make goods, production charges.

2

REP. COMMISSIONS - SHOW REP AMOUNTS

☒ Yes

On the Rep Commission screen, do you want to include the columns that show the Rep's commission percentage and calculated commission amount? If you do not calculate commission based on a straight percentage then these may not be useful to you.

3

DISABLE FUTURE REP ASSIGNMENTS

☒ Yes

Set this option to YES if you want to prevent users from setting a future effective date on rep changes.

If this is set to yes, on the brand, the Effective Date will default to today, and will be grayed out so the user cannot change it.

Advertiser ID

Advertiser Name

Brand ID

Brand Name

Default Sales Rep

This is your default rep

Effective Date

Thursday, Jun

Sales Rep Override

This is the rep assignm

Product Group

-- No Records Returned

Add a New Product G

Customer Demo

Add

Sales Rep Override

This is the rep assignm

Product

Default

Add a New Product O

ADD/EDIT REP ASSIGNMENT

Override for Product Group

Customer Demo

Past and Current Assignments

Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On
-- No Records Returned --					

Add a New Assignment

Effective Date

Thursday, June 6, 2024

Assign in Order Entry

No

Sales Rep 1

Percent

Sales Rep 2

Percent

Sales Rep 3

Percent

Sales Rep 4

Percent

Disable

Cancel

Add

Similarly, on the Change rep assignment screen, the effective date will be grayed out and not usable if the Disable Future Rep Assignments is set to yes,

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Campaign Budget Ana...

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

CHANGE REP ASSIGNMENTS

Use the checkboxes in the following list of Advertisers/Brands to indicate the items to change. You may use the checkbox at the top of the grid to select all. Once you have selected the Advertisers/Brands you would like to change, set the new Sales Rep at the bottom of the screen.

Current Sales Rep

Chloe Closer

Effective Date

As of Date

Get Data

Assignments

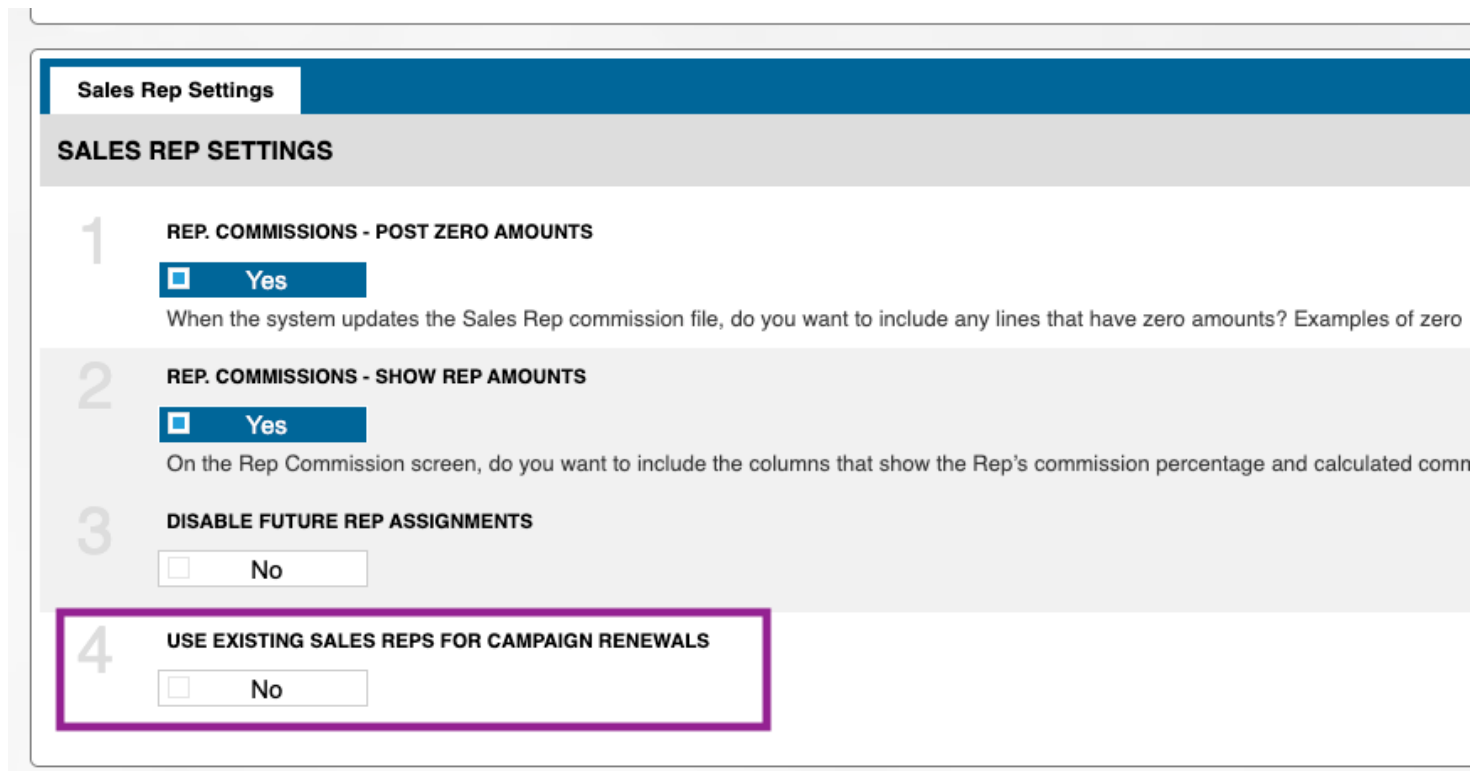
Drag a column header and drop it here to group by that column

Advertiser ID	Advertiser	Brand ID	Brand	Assignment Type	Product / Group	State/Province/Region	Effective Date	Effective Until	Split
100335	Keswick Theatre	XX	Keswick Theatre	Group	Naviga Product Group		3/2/2024		100.00%
100343	Mt. Healthy Dairy Bar	XX	Mt. Healthy Dairy Bar	Group	Naviga Product Group		3/2/2024		100.00%
100352	Christ United Methodist Church	XX	Christ United Methodist Church	Group	Naviga Product Group		3/2/2024		100.00%
100001	Exxon Mobil	XX	Exxon Mobil	Brand Default	Brand Default		6/6/2024		100.00%
100005	Starbucks	A1	Corporate	Brand Default	Brand Default		3/2/2024		100.00%
100049	American Airlines	XX	American Airlines	Brand Default	Brand Default		11/11/2021		100.00%
100057	BMW of North America, LLC	A2	Local Dealership	Brand Default	Brand Default		3/2/2024		100.00%
100159	Miller Funeral Home	XX	Miller Funeral Home	Product	The Navigator Daily News Classified		3/2/2024		100.00%
100162	Lansdale Courthouse	XX	Lansdale Courthouse	Brand Default	Brand Default		12/14/2021		100.00%
100167	Stove and Tap	XX	Stove and Tap	Brand Default	Brand Default		10/26/2021		100.00%

Likewise, on the import, the effective date on the import template will be ignored if data is entered there, and "today" will be the effective date for the import. (See **Change/Import Sales Rep Assignments** for more info on importing Rep Assignments)

Option to Use Existing Rep for Renewals

When renewing a campaign, the default behavior is to renew with the current brand rep for the account. By setting this flag, the system will instead re-use the rep on the order which is being renewed.



Sales Rep Settings

SALES REP SETTINGS

- 1 REP. COMMISSIONS - POST ZERO AMOUNTS**
☒ **Yes**
When the system updates the Sales Rep commission file, do you want to include any lines that have zero amounts? Examples of zero
- 2 REP. COMMISSIONS - SHOW REP AMOUNTS**
☒ **Yes**
On the Rep Commission screen, do you want to include the columns that show the Rep's commission percentage and calculated comm
- 3 DISABLE FUTURE REP ASSIGNMENTS**
☐ **No**
- 4 USE EXISTING SALES REPS FOR CAMPAIGN RENEWALS**
☐ **No**

Disable a Rep Override on Product or Product Group

Prior to 2024.1 there was a delete button to remove a Rep Override on the Brand Maintenance screen. When we added the ability to schedule a rep change for a future date, the delete button was removed. The idea was that you would just change the rep override rather than deleting it. Turns out the ability to remove the overrides were important because the situation could arise that the override was no longer needed, so we have now added a "Disable" button to the Overrides by Product or Product Group.

Navigate to **Customers -> Brands -> Brand Maintenance** and select the rep assignment node on the left navigation. Click the pencil icon to the left of the Product or Product group override section and note there is now a disable button at the bottom left of the window.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product Group Sales Perf... Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint Advertiser Ranking Commissions

Rep Assignment

- Billing Overrides
- Production Contacts
- Tearsheet Contacts
- Division Setup
 - Division Detail
 - Exhibition Group Overrides
- Orders
 - List of Orders

Advertiser ID
Advertiser Name
Brand ID
Brand Name

 Default Sales Rep
This is your default rep
Effective Date
Saturday, Ma

 Sales Rep Override
This is the rep assign
Product Group
Naviga Prodi
Add a New Product C
Add

 Sales Rep Override
This is the rep assign
Product
Biking Maga
Add a New Product Override

ADD/EDIT REP ASSIGNMENT

Override for Product
Biking Magazine

Past and Current Assignments					
Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On
Thursday, June 13, 2024	Donna Beasley 100.00 %				Thursday, June 13, 2024 12:40 PM Kelly Smith

Add a New Assignment

Effective Date
Thursday, June 13, 2024

Assign in Order Entry

No

Sales Rep 1
 Sales Rep 2
 Sales Rep 3
 Sales Rep 4

Percent
 Percent
 Percent
 Percent

Disable

Cancel

Add

For an override that is already disabled, the button will change to "Re-Activate"

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product Group Sales Perf... Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint Advertiser Ranking Commissions

Brand Setup

- Brand Detail
- Rep Assignment
- Billing Overrides
- Production Contacts
- Tearsheet Contacts
- Division Setup
 - Division Detail
 - Exhibition Group Overrides
- Orders
 - List of Orders

Advertiser ID
Advertiser Name
Brand ID
Brand Name

 Default Sales Rep
This is your default rep
Effective Date
Saturday, Ma

 Sales Rep Override
This is the rep assign
Product Group
Naviga Prodi
Add a New Product C
Add

 Sales Rep Override
This is the rep assign
Product
Biking Maga
Add a New Product Override

ADD/EDIT REP ASSIGNMENT

Override for Product Group
Naviga Product Group

Past and Current Assignments					
Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On
Monday, April 1, 2024	Wayne Burrows 100.00 %				Monday, March 4, 2024 3:07 PM Kelly Smith
Saturday, March 2, 2024	Chloe Closer 100.00 %				Saturday, March 2, 2024 1:02 AM Conversion

Add a New Assignment

Effective Date
Thursday, June 13, 2024

Assign in Order Entry

No

Sales Rep 1
 Sales Rep 2
 Sales Rep 3
 Sales Rep 4

Percent
 Percent
 Percent
 Percent

Re-Activate

Cancel

Add

For the default rep assignment, there is no disable button. If the desire is to no longer have a default rep, select the "assign in order entry" flag instead.

These changes to the rep assignment are recorded on the History of Changes for the account in Name Maintenance:

Account Maintenance

- Name and Address Setup
 - Employees / Contacts
 - Addresses
 - External Contacts
 - External System IDs
- Account Overview
- A/R Setup
- Advertising Setup
- Job Costing Setup
- Exhibition Setup
- Attachments
- Payment Accounts On File
- Account Alerts
- History of Changes

History

Account ID100005

Account NameStarbucks

History of Changes

Date/Time	User	Type	Description	Reason
Thursday, June 13, 2024 12:46:00 PM	Kelly Smith	REPS	Brand A1 Corporate Product Group Naviga Product Group - Reps assignments Disabled effective 06/13/2024	
Thursday, June 13, 2024 12:40:00 PM	Kelly Smith	REPS	Brand A1 Corporate Product Biking Magazine - Reps. set effective 06/13/2024 Donna Beasley 100.00%	
Monday, March 4, 2024 3:07:00 PM	Kelly Smith	REPS	Brand A1 Corporate Product Group Naviga Product Group - Reps. set effective 04/01/2024 Wayne Burrows 100.00%	
Monday, September 18, 2023 10:08:00 AM	Kelly Smith	BRAND	Brand A1 Corporate New Brand Added	
Thursday, June 8, 2023 7:43:00 AM	Kelly Smith	REPS	Default Reps. changed from Wayne Burrows 75.00%, Wayne Burrows 25.00% to Wayne Burrows 75.00%, Donna Beasley 25.00%	
Wednesday, May 10, 2023 11:01:00 AM	Kelly Smith	BRAND	Brand XX Starbucks (Brand) Brand Name changed from Starbucks to Starbucks (Brand)	
Thursday, March 23, 2023 10:26:00 AM	Kelly Smith	BRAND	Brand XX Starbucks (Brand) Actuals Reconciliation Flag changed from E to	
Thursday, March 23, 2023 10:25:00 AM	Kelly Smith	BRAND	Brand XX Starbucks (Brand) Actuals Reconciliation Flag changed from E to	
Thursday, March 23, 2023 10:25:00 AM	Kelly Smith	BRAND	Brand XX Starbucks (Brand) Remit-To changed from N to	

During new campaign creation, and looking at the reports Brand Assignment by Rep and Brand Assignment by Rep Group the disabled rep overrides will be ignored.

Default number of columns set on Classified Template Setup

We can now set a default number of columns on template setup, so if a template was designed with a specific number of columns in mind, that can be set as a default.

Main MenuAd HomeCustomersCampaignsProductionBillingAnalysisSetupLogout

HomeSales ActivityProduct Group Sales ...Product AnalysisPublication AnalysisCampaign Budget Ana...Digital DeliveryPinPointAdvertiser RankingCommissions

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 TreeReal Estate

Template IDFIXED

Template DescriptionFixed Size (3 col x 2.75" Depth)

Classified Self-Service Portal Description

Categories AllowedReal Estate → For Sale, Real Estate → For Sal

Template TypeHTML

Default Columns3

For use in Packages onlyNo

Is InactiveNo

Template HtmlSample Metadata ValuesSample ImageGroup PricingProduct Pricing

100% <> 8.5pt Andale Mono Formats B

#HEADLINE# - \$\$PRICE#

#BEDROOMS# BD | #BATHROOM# BA | #SQ

#LONG_DESCRIPTION#

MLS# #MLS#

#NAME#

#PHONE#

#EMAIL#

#WEBSITE#

When the user switches between layout choices now in the Classified Wizard, the columns will change

accordingly.

This is a booking wizard only feature, so it is not honored in full line entry or in classified self service portal.

[Here](#) is a quick tutorial showing the feature in action from an end user perspective.

In the above scenario, the setup had default columns set for all examples used (1, 2 or 3 columns were my defaults for each template used). If I had left the default blank on some templates, the number of columns used would be 1 if it was the first template selected, and it would be whatever was already in the columns field if it was any of the subsequent templates selected.

If the desire for a certain category is to have the user pick the number of columns once and have all templates use that number of columns, then leave the defaults blank. If the desire is to have the system change the number of columns based on the template selected, then you will likely want to set the appropriate number of columns on all templates for the category.

New Merge Tags

Two new merge tags available both in the Advertising Invoice Forms and the Order Confirmation Templates.

Repeating Area: Line Item Detail Merge Fields	
#CAMPAIGN_ID#	Campaign ID
#LINE_ID#	Line ID
#LINE_DESC#	Line Description
#POSITION_ID#	Position ID
#POSITION_NAME#	Position Name
#SECTION_ID#	Section ID
#SECTION_NAME#	Section Name
#EDITION_ID#	Edition ID
#EDITION_NAME#	Edition Name

#EDITION_ID# and #EDITION_NAME# are now available for use in the Repeating Line Item details area on both forms. Below is an example from an order confirmation, but in both the invoices and the confirmations, you will want to put this tag between the <!--ITEM_START-- > and <!-- ITEM_END-- > tags.

```

<!-- #ITEM_START# -->
<tr>
  <td data-title="Line No." style="font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #LINE_ID#
  </td>
  <td data-title="Product" style="font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">#WEBSITE_NAME# &nbsp;#EDITION_NAME#</td>
  <td data-title="Description" style="font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #LINE_DESC#
  </td>
  <td data-title="Start" style="font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #START_DATE# - #END_DATE#</td>
  <td data-title="Start" style="font-family: arial; font-size: 11px; color: #555555; padding: 8px; text-align: center;">
    #INS_QTY#</td>
  <td data-title="Quantity" style="text-align: center; font-family: arial; font-size: 11px; color: #555555; padding: 8px;">
    #SIZE_ID#&nbsp;#</td>
  <td data-title="Rate" style="text-align: right;font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #RATE_2#
  </td>
  <td data-title="Rate" style="text-align: right;font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #BASE_RATE_2#&nbsp;#</td>
  <td data-title="Amount" style="text-align: right;font-family: arial;font-size: 11px;color: #555;vertical-align: middle;padding: 8px;">
    #EST_AMOUNT#
  </td>
</tr>
<!-- #ADJUSTMENTS_START# -->
<!-- #ITEM_START# -->
<tr style="background-color: #ddd; border-top: 1px solid #ccc; border-bottom: 1px solid #ccc;">
  <td style="font-family: arial;font-size: 9px;color: #555;vertical-align: middle;padding: 4px;">
    </td>
  <td style="font-family: arial;font-size: 9px;color: #777;vertical-align: middle;padding: 4px;">
    --- TOTAL ADJUSTMENT ---
  </td>
  <td data-title="Adj Description" colspan="4" style="font-family: arial;font-size: 9px;text-align: right;color: #555;vertical-align: middle;padding: 4px;">
    <span style="text-decoration: underline;">#NAME#</span>
  </td>
  <td data-title="Adj Amount" style="font-family: arial;font-size: 9px;text-align: right;color: #555;vertical-align: middle;padding: 4px;">
    <span style="text-decoration: underline;">#TOTAL#</span>
  </td>
  <td colspan="2" style="font-family: arial;font-size: 9px;color: #555;vertical-align: middle;padding: 4px;">
    </td>
</tr>
<!-- #ITEM_END# -->

```

The above example looks like this when printed on the order confirmation:

print lines								
Line No.	Product	Description	Issue / Run Date	# of Insertions	Size	Initial Rate	Adjusted Rate	Amount
6784	The Navigator Daily News West Zone	1/4 Page B&W	6/17/2024 - 6/17/2024	1	1/4 Page (BS) (4.832x10.5)	1,500.00	1,500.00	1,500.00

Inserts Rating by Weight

In the new(ish) preprint booking wizard workflow, there is now an option to price by weight.

INSERT RATING SCHEDULES FOR PREPRINTS / INSERTS

Insert Rating Schedules

1

SCHEDULE ID

WEIGHTOZ

ReloadNew

2

SCHEDULE DESCRIPTION

Price by Weight in Ounces

3

IS INACTIVE

☐ No

Basic Settings

Basic Settings

...

1

PRICE TYPE

Quantity Based CPM

2

ESCALATION TYPE

Weight in Oz x Qty

3

Weight in Oz x Qty

Weight in Grams x Qty

Pages x Qty

To accommodate this, there is now an escalation type dropdown in the Basic Settings for Insert Rating Schedules. (Navigate to Setup -> Advertising Setup -> Insert Rating Schedules to access this screen)

Based on what is selected here, the grid at the bottom of the screen will change. Pages and grams will display whole numbers in the grid below and ounces will allow up to 3 decimal places.

Price Escalations			
Add New Escalation		Copy Escalations from Another Schedule	Clear all Escalations
▼	Edit	Weight in Oz	
▼		2.000 Oz	✕
	From Qty	Up To Quantity	Rate
	0	50,000	10.00000
	50,001	100,000	12.00000
	100,001	200,000	14.00000
	200,001	250,000	16.00000
	250,001	300,000	18.00000
	300,001	350,000	20.00000
	350,001	9,999,999	22.00000
▼		4.000 Oz	✕
	From Qty	Up To Quantity	Rate
	0	50,000	15.00000
	50,001	100,000	17.00000
	100,001	200,000	19.00000
	200,001	250,000	21.00000
	250,001	300,000	23.00000
	300,001	350,000	25.00000
	350,001	9,999,999	27.00000
▼		6.000 Oz	✕
	From Qty	Up To Quantity	Rate
	0	50,000	16.00000
	50,001	100,000	18.00000
	100,001	200,000	20.00000
	200,001	250,000	22.00000
	250,001	300,000	24.00000
	300,001	350,000	26.00000
	350,001	9,999,999	28.00000

As an example, in order entry, I would expect to see a rate of \$25 CPM for the following:

▼		8 grams	✕
	From Qty	Up To Quantity	Rate
	0	50,000	21.00000
	50,001	100,000	23.00000
	100,001	200,000	25.00000
	200,001	250,000	27.00000
	250,001	300,000	29.00000
	300,001	350,000	31.00000
	350,001	9,999,999	33.00000

And that is exactly what I see in the below example:

INSERT / PRE-PRINT BOOKING

ZONE SELECTION

Top of the Tree > Philadelphia Metro > Philly City

Total Selection	45,027	45,027	0	0
Selected Zone	Subscribers	Non Subscribers	Retail	
19102- Philadelphia	☒ 1,129	☐ 5,175	☐ 621	
19103- Philadelphia	☒ 5,258	☐ 24,098	☐ 2,630	
19104- Philadelphia	☒ 13,988	☐ 56,988	☐ 6,839	
19106- Philadelphia	☒ 3,169	☐ 11,740	☐ 1,549	
19107- Philadelphia	☒ 3,570	☐ 16,362	☐ 1,786	
19111- Philadelphia	☐ 17,034	☐ 69,399	☐ 7,571	
19114- Philadelphia	☐ 7,418	☐ 30,907	☐ 3,710	
19115- Philadelphia	☐ 8,966	☐ 33,207	☐ 3,986	
19116- Philadelphia	☐ 8,940	☐ 33,112	☐ 4,371	
19118- Philadelphia	☒ 2,648	☐ 10,788	☐ 1,178	
19119- Philadelphia	☒ 6,488	☐ 29,738	☐ 3,245	
19120- Philadelphia	☐ 18,388	☐ 68,104	☐ 8,990	
19121- Philadelphia	☒ 8,777	☐ 36,572	☐ 4,389	

Version for this Selection

Import SelectionsApply

NAVIGA™ 2024.3
Build 240607.0133

ACCOUNT
DEM

YOU ARE LOGGED IN AS
Kelly Smith (KSMITH)

SECURITY GROUP
CLIENTS

LANGUAGE
English (en-US) (Browser Default)

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The user can then go back into the window and make additional selections and add a different version of the insert for that Zone. Perhaps a [short video](#) will be useful for this new feature as well:

There will be some additional work done related to versions with 2024.4 - so stay tuned.

Inserts Download

There is a new button on the inserts wizard zone selection screen to download zone selection:

INSERT / PRE-PRINT BOOKING

Product Selection

Zone Selection

Insert Details

Overruns

Adjustments

Price & Book

Total Selected Distribution
45,027

Use Grid to Select Zones

Use Map to Select Zones

Download Zone Selection

Zone Group	Version	Subscribers	Non Subscribers	Retail
Philadelphia Metro → Philly City → 19102- Philadelphia → 16 June 2024	V1	1,129	0	0
Philadelphia Metro → Philly City → 19103- Philadelphia → 16 June 2024	V1	5,258	0	0

The screenshot displays an Excel spreadsheet with the following data:

Zone	Hierarchy	Version	Group	Qty	External Reference	External Group	Country ISO2	Postal Code	Sort Code
19102- Philadelphia	Philadelphia Metro - Philly City	V1	Subscribers	1,129			US	19102	19102
19103- Philadelphia	Philadelphia Metro - Philly City	V1	Subscribers	5,258			US	19103	19103
19104- Philadelphia	Philadelphia Metro - Philly City	V2	Subscribers	13,988			US	19104	19104
19106- Philadelphia	Philadelphia Metro - Philly City	V1	Subscribers	3,169			US	19106	19106
19107- Philadelphia	Philadelphia Metro - Philly City	V1	Subscribers	3,570			US	19107	19107
19118- Philadelphia	Philadelphia Metro - Philly City	V2	Subscribers	2,648			US	19118	19118
19119- Philadelphia	Philadelphia Metro - Philly City	V2	Subscribers	6,488			US	19119	19119
19121- Philadelphia	Philadelphia Metro - Philly City	V3	Subscribers	8,777			US	19121	19121

Additional option for Campaign Line Format in GAM Setup

Home		Sales Activity	Product Group Sales Perf...	Product Analysis	Publication Analysis	Campaign Budget Analysis	Digital Delivery
- Ad Server Integration - Connection Setup - Settings - Cross Reference Tables - Advertisers - Agencies - Traffickers - Teams - Sales Reps - Placements - Ad Units - Custom Fields - Creative Templates - Native Templates - Other Targeting Tables - Audience Segments	Select Third Party						
	12	AUDIENCE SEGMENT SELECT THIRD PARTY IDS		1,2,3			
				Data entered must be in CSV - Comma Separated Value format.			
	13	CAMPAIGN NAME FORMAT		[Advertiser Name] - [Campaign Description] - [Start Date] - [Campaign ID] - [Product Group]			
				The name format of the order sent, and/or synchronized, to the Ad Server. Any format chosen is subject to a 255 character limit, which may result in truncation.			
	14	CAMPAIGN LINE NAME FORMAT		[Campaign ID] - [Description] - ([Line ID])			
				[Description] - ([Line ID])			
				[Ad Unit] - [Line ID]			
	15			[Campaign ID] - [Description] - ([Line ID])			
				[Product Name] - [Campaign Line Description] - [Campaign Line ID]			
				The date format chosen will be applied to any dates that may be used in one of the name formats above.			

	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jul 2024	---
☐	41988	The Star Website SW1 Size: Square Pop up (250 x 250) Section: ROS	Banner Ad - Run-of-Site		CPM	7/1/2024	7/31/2024	200.00	---
								200.00	

Start Date	2/4/2024
End Date	2/29/2024
Run until cancel	☐ No
Gross Amount	2,140.00
Commission Amount	0.00
Net Amount	2,140.00
Estimated Tax	0.07
Estimated Total	2,140.07
Currency	Use System Default
Default Discount %	0.00
Auto Payment Method	
	Manage Payments
Default Contract	
Payment Terms	NET 30 DAYS
Status	Q1 - Proposals
Project	

These links actually took the user to the same place - the account overview for the customer. So this has been changed. The CRM View still takes you to the Customer Overview like it always did. The Advertiser view has been relabeled as Accounting View and still takes you to the Customer Overview, but with the Accounting tab selected instead of the CRM tab - this will save the user a click if they wish to view the accounting tab instead of CRM.

Require Category Selection in Quick Line Entry (QLE)

In previous releases, the Ad Type Setting to require Category Selection was only honored in Full Line Entry. That setup flag has now been changed to honor both Quick Line and Full Line entry. You will notice that the ad type setup simply reads "Require Category Selection" beginning with this release.

AD TYPE SETTINGS

Ad Type ID

CLSOLFLT

Ad Type Description

Classified Online Flat Fee

G/L Type

Digital Classified (DCLS)

Line Type

Flat Fee

Default Material Approval Status

Approval not Required

Ad Serving Platform

Google Ad Manager Cost Type

Google Ad Manager Line Type

Default Override Qty Percent

Send to Naviga Plan

No

Discounts not Allowed

No

Require Category Selection

No

Ignore Required Metadata Field Rules

No

Listing Entry

No

Enforce Contiguous Days

No

No Agency Commission

No

No Rep Commission

No

Is for Preprints

No

If a user creates a quick line entry order with an ad type requiring a category, the user will be presented with an error message if they click the "create lines" button without going to the Category Metadata tab and selecting a category.

QUICK LINE ENTRY

Select a Package

[this will first clear the grid]

Or Copy from Campaign

this will first clear the grid

Package Display Name

or Select a Product

The Navigator Times (NAV13)

→ and an Ad Type

Print Display, Col x In

→ And a Rateline

[this will add a line to the top of the grid]

B&W Display - Classified Column Inch

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 Times NAV13	163	1213 B&W Display - Classified	Classifieds	6/9/2024	PCOL	1.000	75.00000	75.00
							TOTAL COLUMNS	EFFECTIVE RATE	
							1.00 1.000	75.00000	
							COLUMNS INCHES	RATECARD RATE	
							NOT INVENTORIED		

ERROR

One or more Ad Types Require a Category Selection

OK

Import Metadata Adjustments

Navigate to **Classified Order Setup -> Classified Tree Setup** and then select the option on the left navigation for **Metadata Adjustments Import**.

IMPORT CLASSIFIED CATEGORY METADATA ADJUSTMENTS

Category Setup

Classified Category Setup

Category Trees

Metadata Adjustments by Product

Metadata Adjustments by Group

Metadata Adjustments Import

Category Templates

Classified Packages

Images

 **Important Notes about the Excel Import Template:**

- Columns in Bold are Mandatory.
- Columns highlighted in yellow must be a valid code ID in Naviga.
- A valid code ID for Group ID or Product ID is required for every line.

File to Import

Select

Download Template

Test Import File

Import File

1. If the import template is ready, click Select button to navigate to and choose the file you wish to upload. See below for Import Template field descriptions
2. If the import template is not ready, download the template and see below for instructions for filling it out
3. Click the test import file button to import in test mode to see if there are any errors.
4. If there are any errors, click the X to remove the uploaded file from the import, and then navigate to the file on your computer. Open it in excel and fix the data row causing the error. Re-save the file and then start again with Step 1.
5. When all errors are fixed and you have a successful test, click the import file button to import for real.

Important Note - for any given Category Tree/Metadata field/Product Combination, this will REPLACE what is there for that Metadata Adjustment. It has been noted internally that we should ask the question and allow the user to decide if the import should append or replace existing adjustments. We will add that functionality - but for right now, please take note that this currently will only replace what is there.

Import Template

If this is a new import, select the download template option to download a blank template. The fields can be filled in as follows:

Field	Example	Description	Mandatory?
Category Tree ID	LEGAL	This is the Category ID from the Category Tree Setup	Yes
Metadata Field	Photo	This is the Label/Question Field from Category Metadata Setup	Yes
Group ID	ALL	This is the Product Group ID. This is used if the intent is to import this into the "Metadata Adjustments by Group" setup	EITHER this field OR the Product ID field must be filled in.

Product ID	NAVTIMES	This is the Product ID from Product Setup. This is used if the intent is to import this into the "Metadata Adjustments by Product" setup	EITHER this field OR the Group ID field must be filled in.
Qualifier	A specific value	Options here are "A specific value" or "Not Blank" - same as onscreen options.	Yes
Specific Value	ABC	Alpha-numeric answer to the metadata field question	Only necessary is the above answer is "A specific value"
Adjustment ID	5	This will look at the numeric ID Adjustment, which is best seen on the Metadata Adjustments by product (or group) screen. We will add the ID to the Adjustment setup screen, but currently it is only showing the sort ID - which may or may not be the same as the sort.	Yes
Application Rule	Apply to First Insertion	Options for this - blank (means Apply to All Insertions) Apply to First Insertion Apply to Last Insertion	No
Allow Delete	Y	use Y for yes Blank or N for No	No

ID column added to Adjustments

In Adjustments setup, the ID for the adjustment was hidden from view. This was added to accommodate the above importing of Metadata Adjustments.

Main Menu

Ad Home

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Home

Sales Activity

Product Group Sales P...

Product Analysis

Publication Analysis

Campaign Budget Ana...

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

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

Price Adjustments Import

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

Zone Groups

Zone Setup

Zone Import

Zones Export / Import

Surcharges and Discounts

Product

The Navigator Times

Apply Sort

Copy from another Product

Add a New Line

Sort	ID	Description	Allow Description Override	+/-	Type	Prompt for Value	Prompt for Qty	Value	Hide on Forms	Currency	Ad Type	Section	Position	Section / Position	Override G/L Account	Application Rule (used in Booking Wizard only)	Inactive	
1	1	Manual % Rate Discount External ID	☒	-	Percent	☒	No	0	☐							Apply to All Insertions	☐	⊗
2	2	Manual \$-off Rate Discount External ID	☒	-	Amount	☒	Yes	0	☐							Apply to All Insertions	☐	⊗
3	3	Premium Surcharge (%) External ID	☒	+	Percent	☒	No	0	☐							Apply to All Insertions	☐	⊗
4	4	Premium Surcharge (\$) External ID	☒	+	Amount	☒	Yes	0	☐							Apply to All Insertions	☐	⊗
5	5	Loyal Customer Discount External ID	☐	-	Percent	☐	No	-15	☐							Apply to All Insertions	☐	⊗
6	6	High Maintenance Customer S. External ID	☒	+	Percent	☐	No	25	☐							Apply to All Insertions	☒	⊗
7	7	CLS Photo Upsell External ID	☐	+	Amount	☐	No	15	☐							Apply to First Insertion	☐	⊗
8	8	Background Color Upsell External ID	☐	+	Amount	☐	No	15	☐							Apply to All Insertions	☐	⊗
9	9	Banner Upsell External ID	☐	+	Amount	☐	No	5	☐							Apply to All Insertions	☐	⊗
10	10	\$0.00 External ID	☐	+	Amount	☐	No	0	☐							Apply to All Insertions	☐	⊗

The ID will be incremental numerical id's and should not be confused with the sort code. These numbers may or may not be the same. In the above example, the sort was never changed and they are just sorted in the order in which they were entered. I could re-sort this list into another desired order, which would change the sort numbers, but not the ID's.

Option to "Split All" Campaign Lines

There is a new option in the "Selected Line Options" on campaign lines.

- Campaign - Campaign Setup - Line Items - Optimize Digital Lines - Material Management - Campaign Budget - Campaign Custom Data Forms - Digital Serving Analysis - Billing Schedule - Co-op Billing - User Defined Fields - Notes / Comments - Journal Entries - Revenue Allocation - Production Contacts - Tearsheet Contacts - Generate Proposal / Confirmation - Attachments - Invoices & Payments - Rep Commissions - History of Changes - Go to CRM View - Go to Accounting View	Agency Status Q1 - Proposal Incentives Status 2 Available Adcellerant Proposal ID Adcellerant Budget 0.00	Net Amount 25,557.10 Estimated Tax 0.00 Estimated Total 25,557.10 Currency Local Currency																			
	Line Details Applied Incentives Tickets																				
	Booking Wizard Quick Line Entry Select a Product Select an Ad Type Full Line Entry Send a Proposal Prod. Schedule Audience I																				
	Advertising Orders																				
	Check Incentives Selected Line(s) Options ☐ Split Selected Lines ☐ Delete Selected Lines ☐ Update GAM Targeting ☐ Change Package Name ☐ Price Change - Bottom Line Override ☐ Insert/Trigger Change History Numbers in the Gr Display Estimate																				
	<table> <tr> <th>ID</th><th>Description</th><th>Size</th><th>Section</th><th>Position</th></tr> <tr> <td>☒ 6867</td><td>Automobile Mag Website</td><td>Size: Skyscraper (120 x 600), Square Pop up (300 x 300), Square Button (125 x 125)</td><td>Section: ALL</td><td>Position: RR</td></tr> <tr> <td>☐ 6903</td><td>Biking Mag Website</td><td>Size: Medium Tile (300 x 300), Medium Rectangle (300 x 250), LeaderBoard (728 x 90)</td><td>Section: ALL</td><td>Position: FF</td></tr> <tr> <td>☐ 6904</td><td>Biking Magazine</td><td>Size: 1/3 Page (H) (Mag) (7.375 x 3.25)</td><td>Section: ALL</td><td>Position: FF</td></tr> </table>		ID	Description	Size	Section	Position	☒ 6867	Automobile Mag Website	Size: Skyscraper (120 x 600), Square Pop up (300 x 300), Square Button (125 x 125)	Section: ALL	Position: RR	☐ 6903	Biking Mag Website	Size: Medium Tile (300 x 300), Medium Rectangle (300 x 250), LeaderBoard (728 x 90)	Section: ALL	Position: FF	☐ 6904	Biking Magazine	Size: 1/3 Page (H) (Mag) (7.375 x 3.25)	Section: ALL
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☐ 6904	Biking Magazine	Size: 1/3 Page (H) (Mag) (7.375 x 3.25)	Section: ALL	Position: FF																	
LINE SPLIT OPTIONS ABOUT THIS PROCESS This process is used to split lines - where a line may have more than one issues/dates or month containers and the desired outcome is to create two (or more) line items - splitting on a specific date, splitting all dates, or by the portions that are billed vs the portions that remain to be billed. Once run, this process is not reversible. Only use this process if you know what you are doing! SPLIT TYPE Split on Date Split on Date Split Billed Portions Split All SELECTION TYPE Selected Lines Split Lines																					
<table> <tr> <th>End Date</th><th>Aug 2024</th><th>Sep 2024</th><th>Oct 2024</th></tr> <tr> <td>12/31/2024</td><td>16.63</td><td>16.10</td><td>16.63</td></tr> <tr> <td>12/31/2024</td><td>101.31</td><td>98.04</td><td>101.31</td></tr> <tr> <td>12/1/2024</td><td>4,995.00</td><td>4,995.00</td><td>4,995.00</td></tr> </table>		End Date	Aug 2024	Sep 2024	Oct 2024	12/31/2024	16.63	16.10	16.63	12/31/2024	101.31	98.04	101.31	12/1/2024	4,995.00	4,995.00	4,995.00				
End Date	Aug 2024	Sep 2024	Oct 2024																		
12/31/2024	16.63	16.10	16.63																		
12/31/2024	101.31	98.04	101.31																		
12/1/2024	4,995.00	4,995.00	4,995.00																		
1/3 Page (H) (Mag) PMOD 8/1/2024																					
5,112.94 5,109.14 5,112.94																					

If the user selects one or more lines and then chooses to Split Selected Lines in the options dropdown, there is a new split type of "Split All"

The use case for this is primarily around digital lines. It was desired by some of our clients to split campaigns that are sent to GAM so that the ops users could better control the monthly allocations and not fulfill long running campaigns too soon. There is an option to split lines at the product level, but that splits the lines as soon as the order is created. It was causing extra work then for the ops users to set targeting and creatives on all the separate lines. This new option will allow the sales user to create a single line as a quote, have all the targeting and creative linking be done on a single line, and then have ops split the line just prior to changing the status to send to GAM.

CRM Module

Prompt for Quote Status in Auto-Generate Proposal from Opportunity

When creating a proposal from an Opportunity, the user will now be prompted to select which Quote status (Q1, Q2, or Q3) they would like to use for the Campaign Status. The default behavior will be to set the status according to the **user security -> Rep/User Integration -> Proposal Settings -> Default Proposal Status**.

On the opportunity, the user will see this when they click to create a the proposal:

This feature was added in June (for 2024.3), but was able to be patched back to 2024.2

Advertiser Portal

 Hide Download Option

A new option is available in the portal signature section on Portal Setup

Proposal Signature Settings

PROPOSAL SIGNATURE SETTINGS

1

UPON SIGNATURE, SET CAMPAIGN STATUS TO

Reserved 1 - not sent to GAM

Define which Status a Campaign is put in when a Proposal is approved online

2

UPON PRE-PAYMENT, SET CAMPAIGN STATUS TO

3

ONLY CHANGE STATUS ON PRE-PAY IF AT LEAST THIS PERCENT IS PAID

4

HIDE PROPOSALS WHERE ACCOUNT IS PENDING APPROVAL

☐ No

5

HIDE PROPOSALS THAT ARE PENDING APPROVAL

☐ No

6

HIDE "DOWNLOAD" BUTTON AFTER APPROVING A PROPOSAL

☐ No

Setting this to "No" will be the default (so that it will continue to behave as it did in prior versions) and the user see the option to download a pdf copy of their signed proposal upon signing the proposal as displayed below:



Proposal 11100035 has been approved

What would you like to do next?

Pay for This Order

Download a Copy

Approve Another Document

Return to Main Page

If this is set to "Yes" instead, the Download a copy option will be hidden as shown below:



Proposal 11100035 has been approved

What would you like to do next?

Pay for This Order

Approve Another Document

Return to Main Page

SSO Option for Portal

This option allows for integration with another client portal where the user signs in there and authentication passes through to the Naviga Ad Advertiser Portal.

The client we are working with on this mod has multiple 3rd party systems for various things, in addition to the Naviga Ad Advertiser Portal for paying bills, signing proposals, etc, and they did not want the client to have to log into separate systems, so they created their own portal, where the user can log in and then get directed to various systems for different functions. Once authenticated in that system, the authority will pass us a token for logging in to our Portal. These are the necessary settings in Naviga Portal Setup to enable this function:

SSO Options

SSO OPTIONS

...

- 1 ENABLE SSO**
☒ Yes
- 2 LOGIN URL**
https://www.yourportal.com/login
- 3 LOGOUT URL**
https://www.somewebsite.com/logout
- 4 TOKEN EXPIRE (IN MINUTES)**
60

1. Enable SSO: Set this to yes to enable SSO. ***Once this is set, users will no longer be able to log in directly to the Client Portal - so only set this to yes, if you really do have an alternate login authority that is passing us a log in token***
2. Login URL: This will be the URL where clients should be going to log into your Portal. If a client has an old bookmark or otherwise gets directed to the standard Naviga Portal login screen, they will be redirected to here to actually log in and receive their token.
3. Logout URL: If the client clicks the Logout button inside the Naviga Advertiser Portal, this is where they will be directed to, so it should likely be the same page they would get to if they logged out from your sites main portal.
4. Token Expire (in Minutes): This sets the length of time that will elapse before the user will be redirected back to the login screen to re-authenticate.

Testing Notes

To test this, you will need to get a token and paste it to the end of the URL to the portal with the format of ?tkn=[your token here]

For example: <https://abc.navigahub.com/portal/client/abc/default/invoices/open?tkn=8fbce7e9-3fec-40a7-8c8a-b708ec31a37d> [Replace ABCs with your 3-digit site code and replace the actual token (after the equals) with a

valid token.] A Token can be retrieved using the Naviga API, either from the swagger page, Client Portal section, or from a 3rd party tool like Postman.

Classified Self-Service

Several exciting new features in the self service portal to share with you.

Support for Zero Priced Ads

In prior releases, the credit card dialog box would pop up and collect credit card details even for free ads. Starting with 2024.3, the system will support the idea that ads placed through Classified Self Service might not have a cost to them and will therefore allow the client to simply submit the ad without adding credit card information. If the ad has no cost, the button at the bottom of the screen will indicate "Submit" rather than "Approve and Pay." The submitted ad will still be placed into the queue for the internal user to review and approve/decline the ad.

Step 1

Step 2

Step 3

Step 4

Step 5

Ad Category

Booking Selection

Ad Information

Order Summary

Confirmation

4

YOUR AD PROOF AND RUN DATES

Below is a proof of your ad along with the publication(s) and date(s) it is set to run in. Please review and adjust the date(s) as necessary. Make sure you have entered your personal contact information and then click OK to proceed to payment.

Ad Proof

test - test

Review Your Run Date(s)

The Navigator Website*

6/7/2024

FREE

Selected date range, 7 day run

• From: Friday, June 7, 2024

• Through: Thursday, June 13, 2024

Your Booking Summary

Selected Category

Merchandise

Selected Sub-Category

Coins and Collectibles

Selected Package

Self-Service Package 1 - Merchandise

Total Price

0.00

Your Contact Information

Email Address*

Kellys@navigaglobal.com

Phone Number*

222-333-4444

First Name*

Kelly

Last Name*

Smith

PREVIOUS

SUBMIT

 **Support for different packages for different sub-categories**

It has long been supported for different categories within a category tree to be able to have different metadata and different templates, but when it came to packages, the package was only at the tree level, so there wasn't enough filtering in Classified Self Service to display only the packages relevant to a specific sub-category. That limitation has now been remedied.

Navigate to **Setup -> Classified Order Setup -> Classified Package Setup**. There is now a new tab in the bottom section which allows for selecting one or more sub-categories to be valid for a certain package. If nothing is added to the Restricted column, then the package will be allowed for all categories in that category tree.

Home

Sales Activity

Product Group Sales Perf...

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Ad

Metadata Adjustments by Product

Metadata Adjustments by Group

Category Templates

Classified Packages

Images

Package ID

SSPETSCATS

+

Description

Self-Service Package 1 - Cats

Order Entry Message

Product Group

Naviga Product Group

Default Template

Good - Reverse Text1 - Pets

Other Optional Templates

Valid From

9/1/2020

Valid Through

12/31/2025

Available on Classified Self-Service Portal

☒ Yes

Fiat Fee Package

☒ Yes

Fiat Fee Amount

45.00

Prompt for Product Selection

☐ No

Minimum Product Selection Allowed

Prompt for Package Multiplier

☐ No

Products

Online Options

Metadata Exclusions

Sub-Category Restrictions

The Restrictions set here currently work on the Classified Self-Service Portal only.

AVAILABLE CATEGORIES

Search

Clear

Merchandise

Merchandise → Coins and Collectibles

Merchandise → Garage Sales

Merchandise → Pets

Merchandise → Pets → Dogs

Merchandise → Pets → Other Pets

RESTRICT TO ONLY THESE CATEGORIES

Merchandise → Pets → Cats

Support for Issue Deadlines

In the Classified Self-service setup screen there is a minimum order lead time field where you might put a day or two in there to give yourselves some time to approve the ads before they are set to run. That is fine for a daily paper or for online, but if you have a more complex package that includes weekly or even monthly publications along with a daily, then 1 or 2 days lead time isn't going to work since the actual deadline for that product may have long since passed even though the issue date is still in the future. The system will now look at the Issue Deadline from issue configuration.

Home

Sales Activity

Product Group Sales ...

Product Analysis

Publication Analysis

Campaign Budget Ana...

Digital Delivery

PinPoint

ISSUE CONFIGURATION

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

Price Adjustments Import

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 Configuration

Product ID

Navigator Weekly

Issue Selection Start Date

6/6/2024

Issue Configuration

Bulk Update Op

ID	Issue Date	Issue Day of the Week	Issue Description	Close Date	Material Due Date	Comparison Issue	Budget Amount	Budget Pages	Financial Period
14787	6/7/2024	Friday	Jun 07, 2024	Monday, June 3, 2024 4:00 PM	Thursday, June 6, 2024	6/9/2023	25,000	8.000	2024-06
14788	6/14/2024	Friday	Jun 14, 2024	Monday, June 10, 2024 4:00 PM	Thursday, June 13, 2024	6/16/2023	25,000	8.000	2024-06
14789	6/21/2024	Friday	Jun 21, 2024	Monday, June 17, 2024 4:00 PM	Thursday, June 20, 2024	6/23/2023	25,000	8.000	2024-06
14790	6/28/2024	Friday	Jun 28, 2024	Monday, June 24, 2024 4:00 PM	Thursday, June 27, 2024	6/30/2023	25,000	8.000	2024-06
14791	7/5/2024	Friday	Jul 05, 2024	Monday, July 1, 2024 4:00 PM	Thursday, July 4, 2024	7/7/2023	25,000	8.000	2024-07
14792	7/12/2024	Friday	Jul 12, 2024	Monday, July 8, 2024 4:00 PM	Thursday, July 11, 2024	7/14/2023	25,000	8.000	2024-07
14793	7/19/2024	Friday	Jul 19, 2024	Monday, July 15, 2024	Thursday, July 18, 2024	7/21/2023	25,000	8.000	2024-07

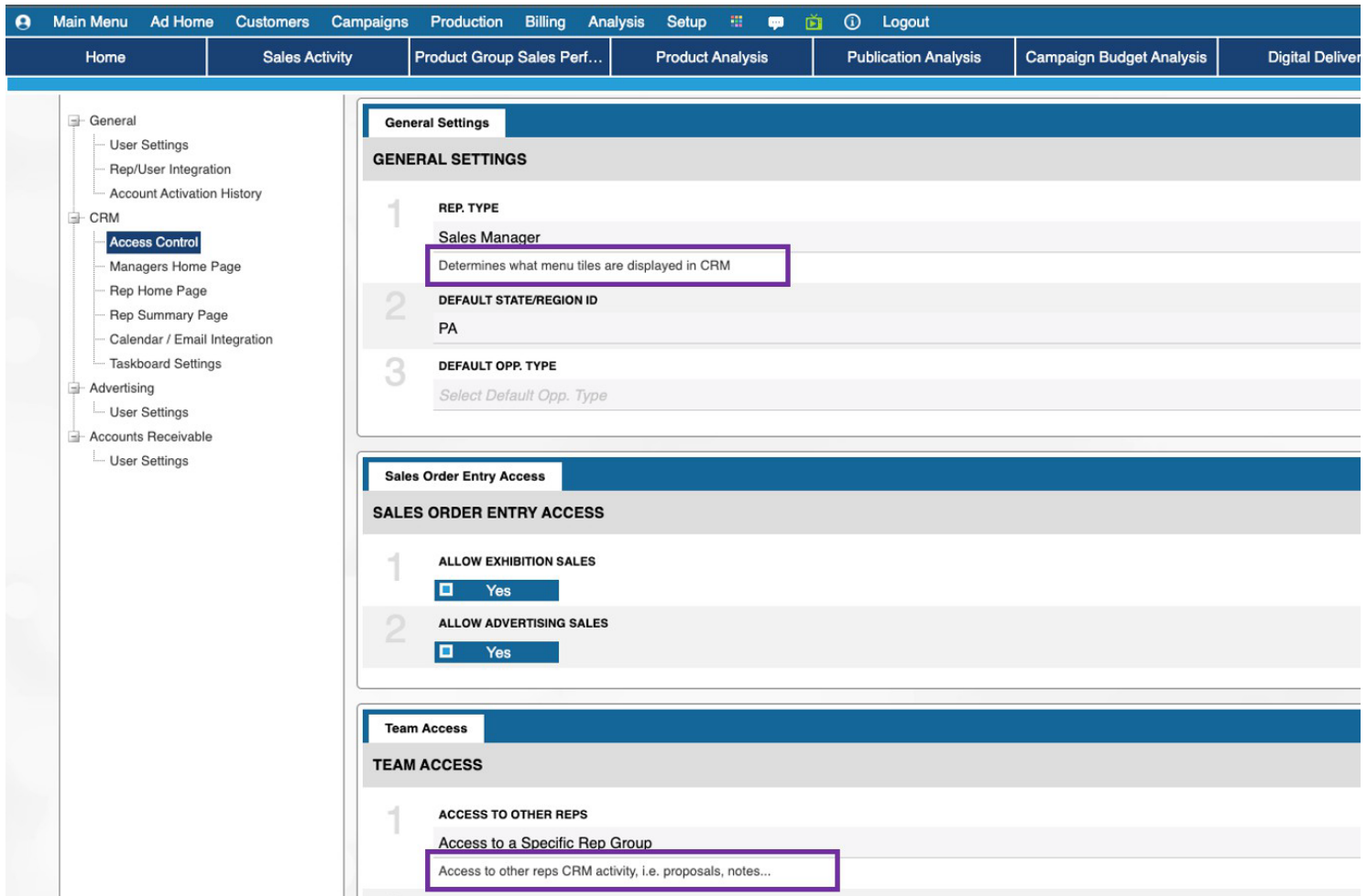
In the example above, if a client was booking a package which included a daily paper and the weekly paper, and were booking the ad on say Wednesday June 12th, the daily paper may default to June 13th based on those deadlines, but the weekly, the first available date will be June 21, since the deadline for the June 14th issue has already passed.

This does not yet support the complex deadlines which can be set up internally to have different deadlines for different Ad Types, Categories, etc, but we may revisit that in a future release based on feedback from those using Self-service if that complexity is needed.

General/System Settings

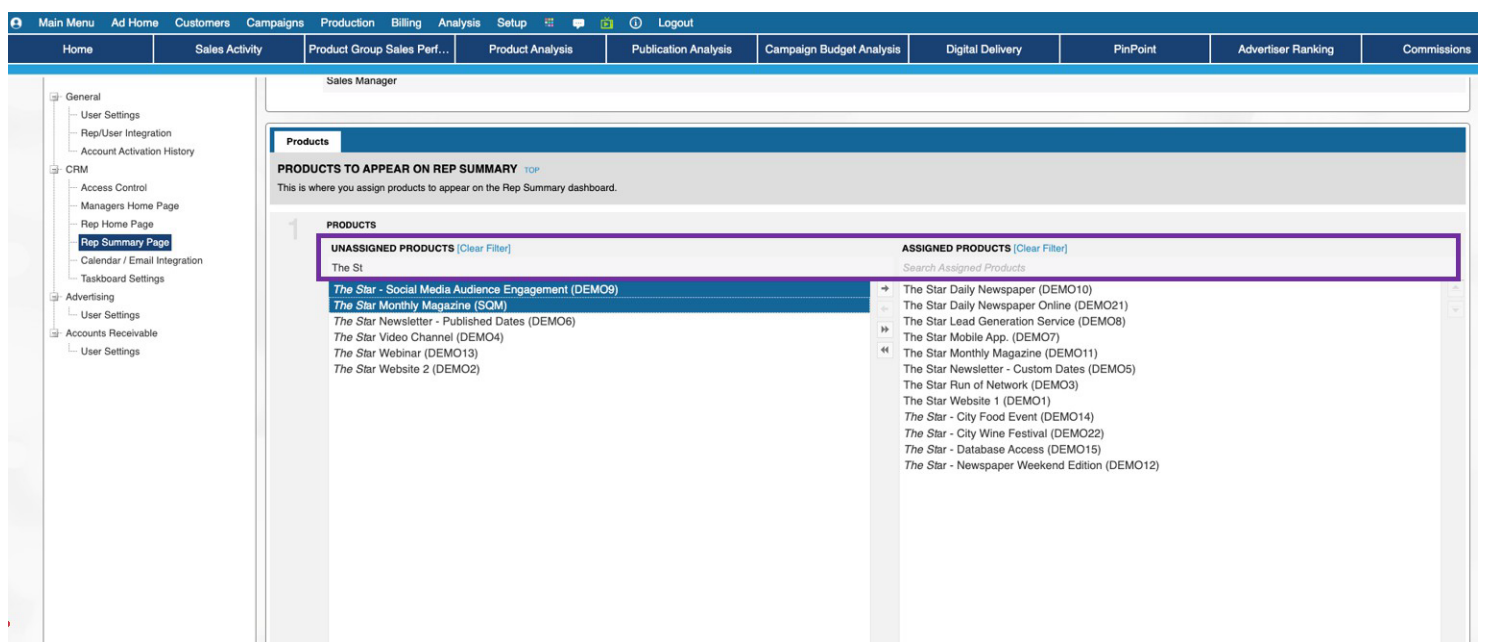
Additional Descriptions added in User Security settings

Several new hints have been added to assist new users in understanding what certain User Security options mean. For example:



Filter added to Product List on Rep Summary Page in User Security

Navigate to **User Security** -> **Rep Summary Page** -> **Products** Section.



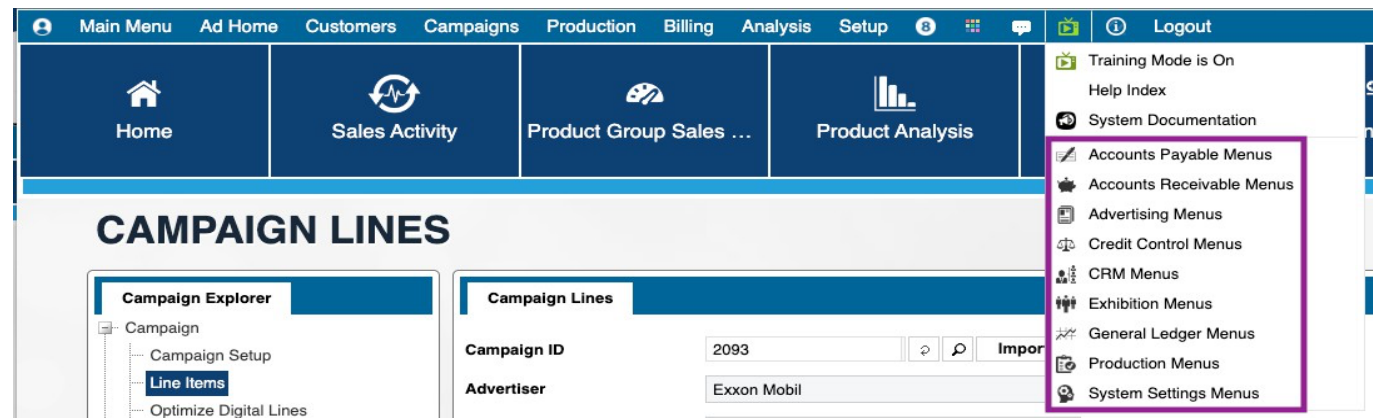
For clients with a long list of products this list was cumbersome to sort through, so now they can start typing at the top of the product list to apply filters. Product Name or Product ID can be used for filtering. Once filtered, user can single select or multi-select the desired products to move to the "Assigned

Products" column.

This same filtering and selection options will also be available on My Profile CRM tab (click this icon in the top left corner of any screen  to access My Profile popup window), so that users can self-manage the list of products they wish to see on the Rep Summary report.

Easily switch between Module Menus

If you are a user who is in a single module all day long, or a user who operates in a single browser tab all day long, you will not be nearly as excited about this mod as I am! I'm sure there are several system admins out there though that will appreciate this mod though. This is something that the Naviga ROOT users have had forever, but it was hidden to the regular system users. That has now been changed and everyone can use these quick menu switches - but only for modules that you are given permission to use.



The use case for this one I think is easier to see in a quick video rather than trying to type it out using screenshots, so please [check it out](#)

In addition, the "Help Index" shown on the above screenshot has now been removed as it has been replaced by the "System Documentation" option. There shouldn't be a need anymore to go into the older Help Index - but if there is anything needed in there - just let us know. The page still exists, but it just isn't on the menu to avoid confusion - so we can give you the URL for direct access as needed.

Keep Color on Test Account Refresh

When refreshing the TEST system from PROD, there are a variety of items which do not refresh. The system defaults to the Catalina Blue selection (shown below), but the user can select from the other choices on the list. To more easily differentiate between TEST and PROD, some users like to choose different colors between the two databases. Prior to 24.3, when test was refreshed, whatever color choice was used in PROD would be copied over to TEST and the user would need to re-pick their test color choice. Now, the color choice sticks and will not be reverted back to the PROD color during a refresh.

