Release Guide

This document provides instructions for how to use the new features in the 2023.4 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:

- **Variable Pricing by Payment Type** - Variable Pricing by Payment Type allows a % processing fee to be added to credit card and electronic transactions. This is a new concept for Naviga Ad and will be an add on which can be purchased from your Account Rep (if you don't know who your Account Rep is, please use the Contact Naviga links at the top of this screen). See **below** for additional details.
- Be sure to visit the **Group Security** changes section to see if there is anything you wish to take advantage of (or not!).
- **GAM Integration Deadlines** - If you are currently on Naviga version 2022.5 or 2023.1, the GAM integration is valid through November 2023. Naviga versions 2023.2 and 2023.3 are valid through February 2024. Versions 2023.4 and 2023.5 will be valid through May of 2024. Please plan your upgrades accordingly. If you are on a version earlier than 2022.5, you should upgrade ASAP to avoid interruption with Google.
- Take note of the **Package Multiplier** setup change below. If you are currently using the multiplier and don't have the Product selection option checked, be sure to check it if you want the users to be prompted to select a product, otherwise it will behave a little differently than they are used to.
- **NEW **** - Topics below that were included in the release video, will now have a clickable video icon next to the heading. Click the to go to the video. The paragraph beneath the video has timestamps for each topic, so you can jump to

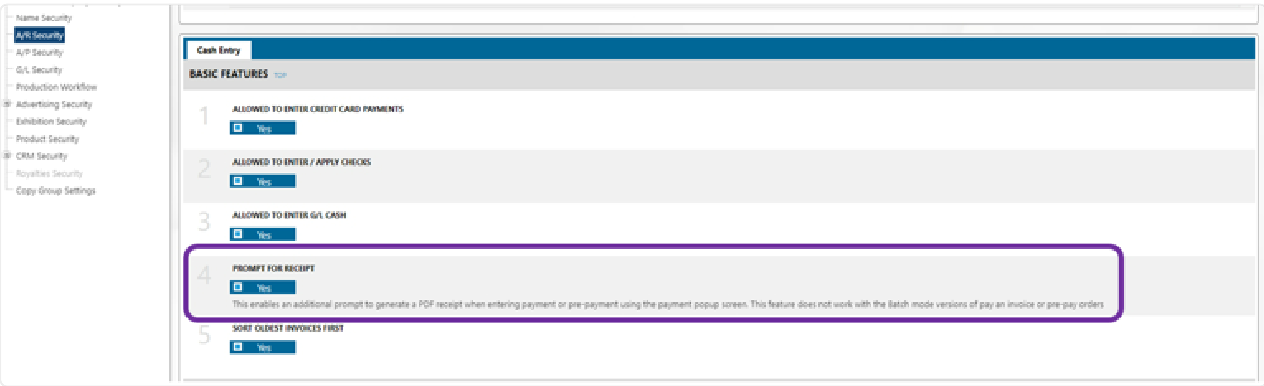
the desired topic. Use Ctrl-click (Cmd-Click on mac) to open in a new tab and not lose your place in the release guide.

Advertising Module

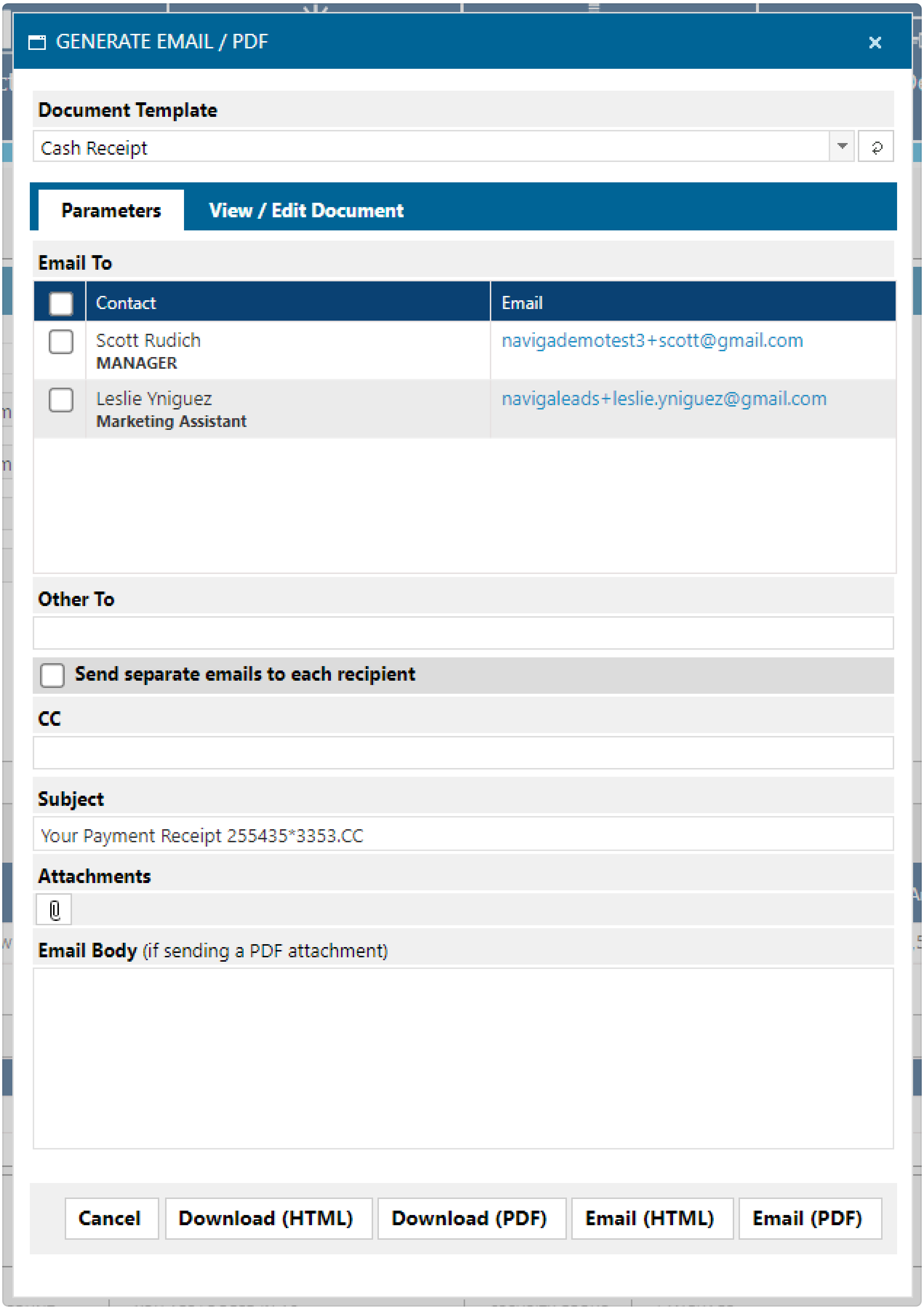
Email Payment Receipt

After taking a payment on a campaign or an invoice with a credit card or other payment type, the user is presented with an option to create a receipt. Previously the receipt would be created as a pdf and then the user would need to download it and email it to the client outside the system. Now the user can select to have the system email the payment receipt instead. The window works similarly to sending an order confirmation, so it will be familiar to the user.

The user will be presented with the option to create a receipt based on Group Security in A/R node - "Prompt for Receipt" option

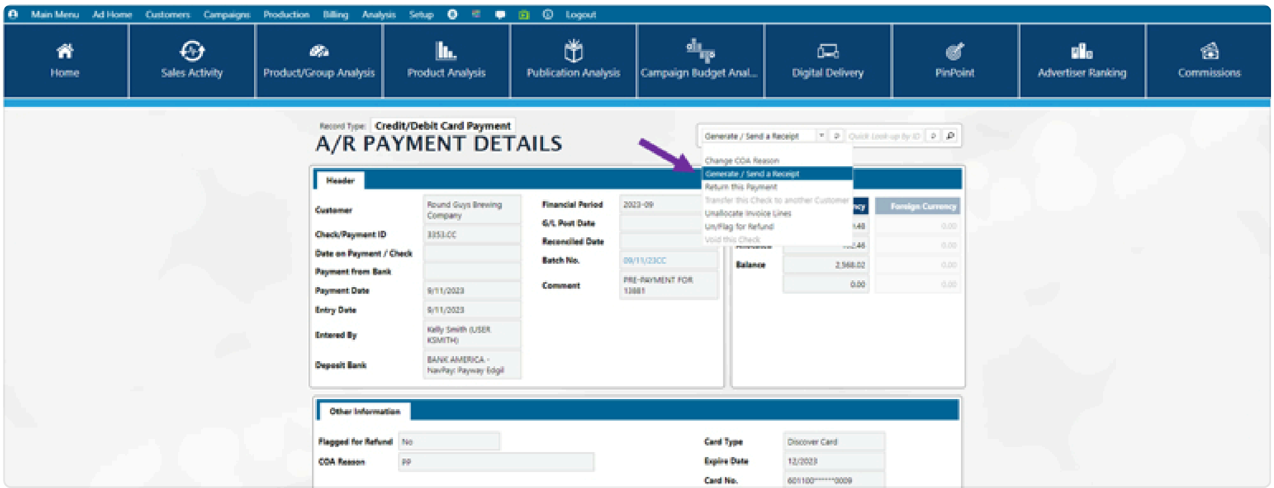


If this is set to yes, the user will be prompted after taking a payment if a receipt is desired. If the user says yes, the following screen displays:

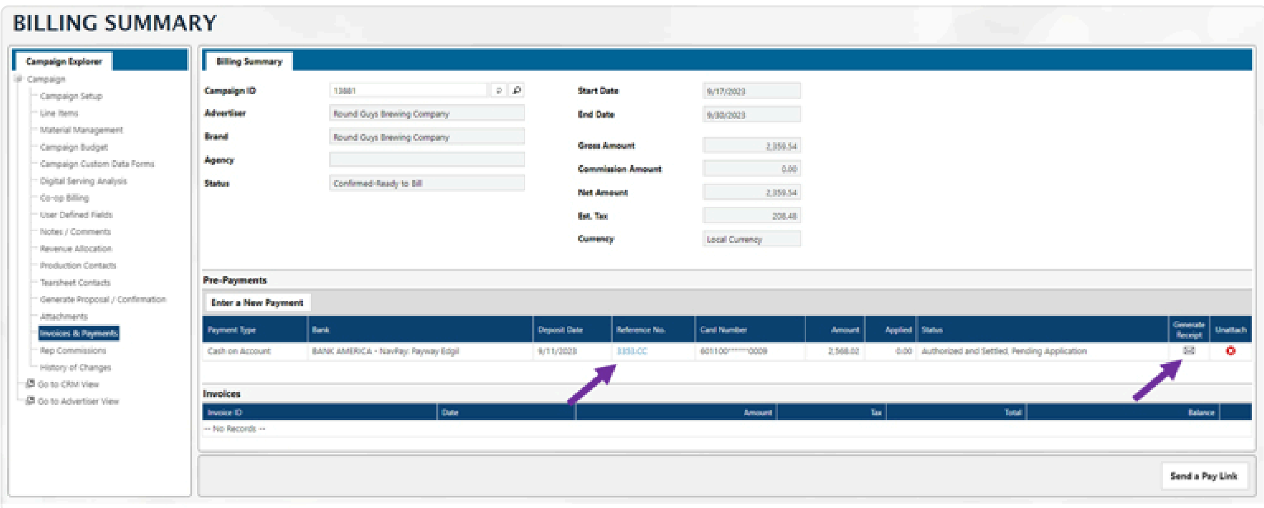

GENERATE EMAIL / PDF
Document Template
Cash Receipt
Parameters
View / Edit Document
Email To
Contact
Email
Scott Rudich
MANAGER
navigademotest3+scott@gmail.com
Leslie Yniguez
Marketing Assistant
navigaleads+leslie.yniguez@gmail.com
Other To
Send separate emails to each recipient
CC
Subject
Your Payment Receipt 255435*3353.CC
Attachments
Email Body (if sending a PDF attachment)
Cancel
Download (HTML)
Download (PDF)
Email (HTML)
Email (PDF)

Select the contact(s) to receive the receipt, along with any other "TO" or "CC" email addresses. The default subject can be modified as needed. If emailing receipt as a PDF, a custom body text should be entered, otherwise, email can be sent as HTML email based on the template selected at the top of the screen. To view/edit the document, select the view/edit tab prior to sending. If you wish to download and print or send externally, the download option is at the bottom of the screen.

This email function can be called from Order Entry, after prepaying for orders, from A/R when paying an invoice with a credit card, OR from the payment details page when choosing to print a receipt later. The below screen can be accessed from various areas of the system by clicking on the payment ID



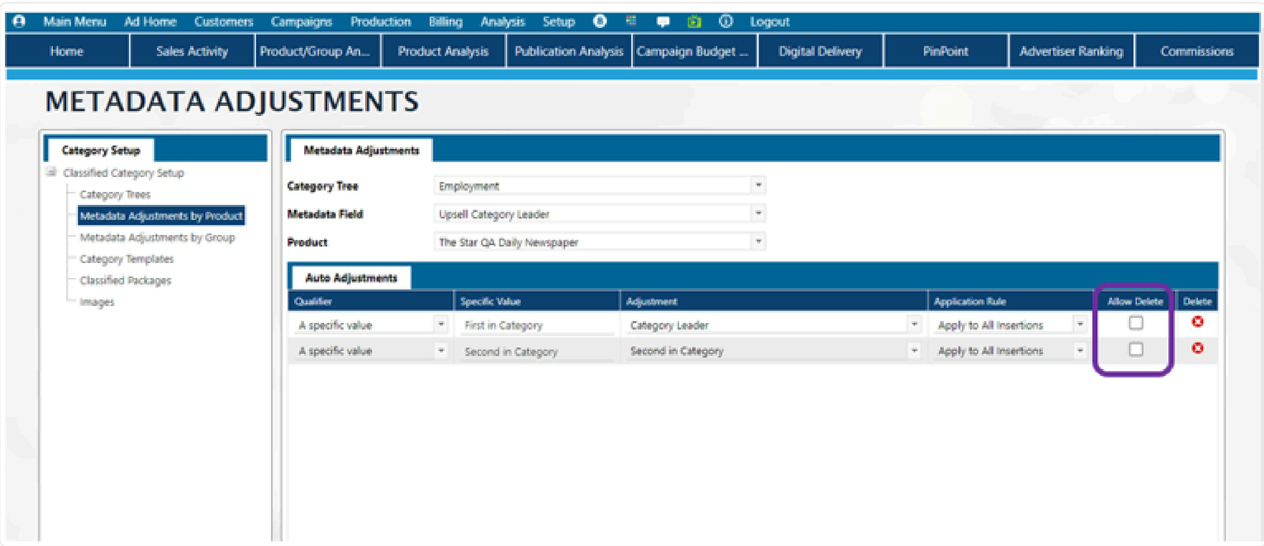
If the user security is not set to prompt for receipt, and to make it a little easier on the user when the customer asks for a receipt later, two new options have been added to the campaign's Invoice's and Payments node:



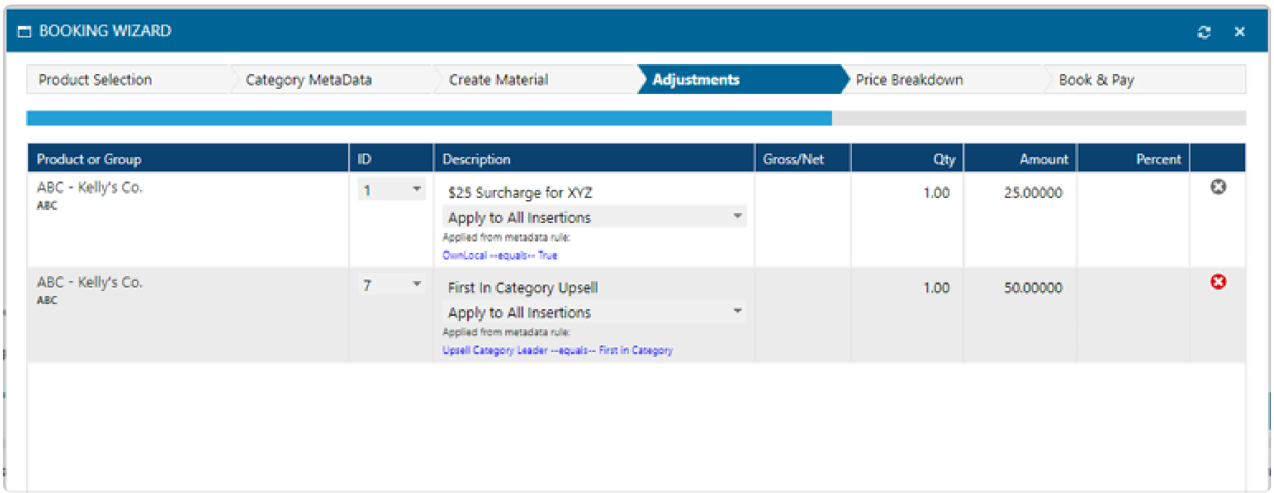
Click on the hyperlink of the payment ID in the "Reference No" column and the payment details screen will be displayed and the user can generate the receipt from there (based on user permissions, several of those other options may be grayed out). Or even quicker - click on the Generate Receipt icon and the receipt window will be brought up and user can sent the receipt from there.

Allow Delete on Classified Metadata Adjustments 🎬

There is now a flag on each Classified Metadata Adjustments which indicates if that adjustment is user deletable or not. By default, metadata adjustments cannot be deleted, but now you can set Allow Delete to be checked and that will allow users to delete the charge. This option is available both on Metadata Adjustments by Product and Metadata Adjustments by Group. There is no additional Group Security around this option, so if you allow delete, all user groups will be able to delete.

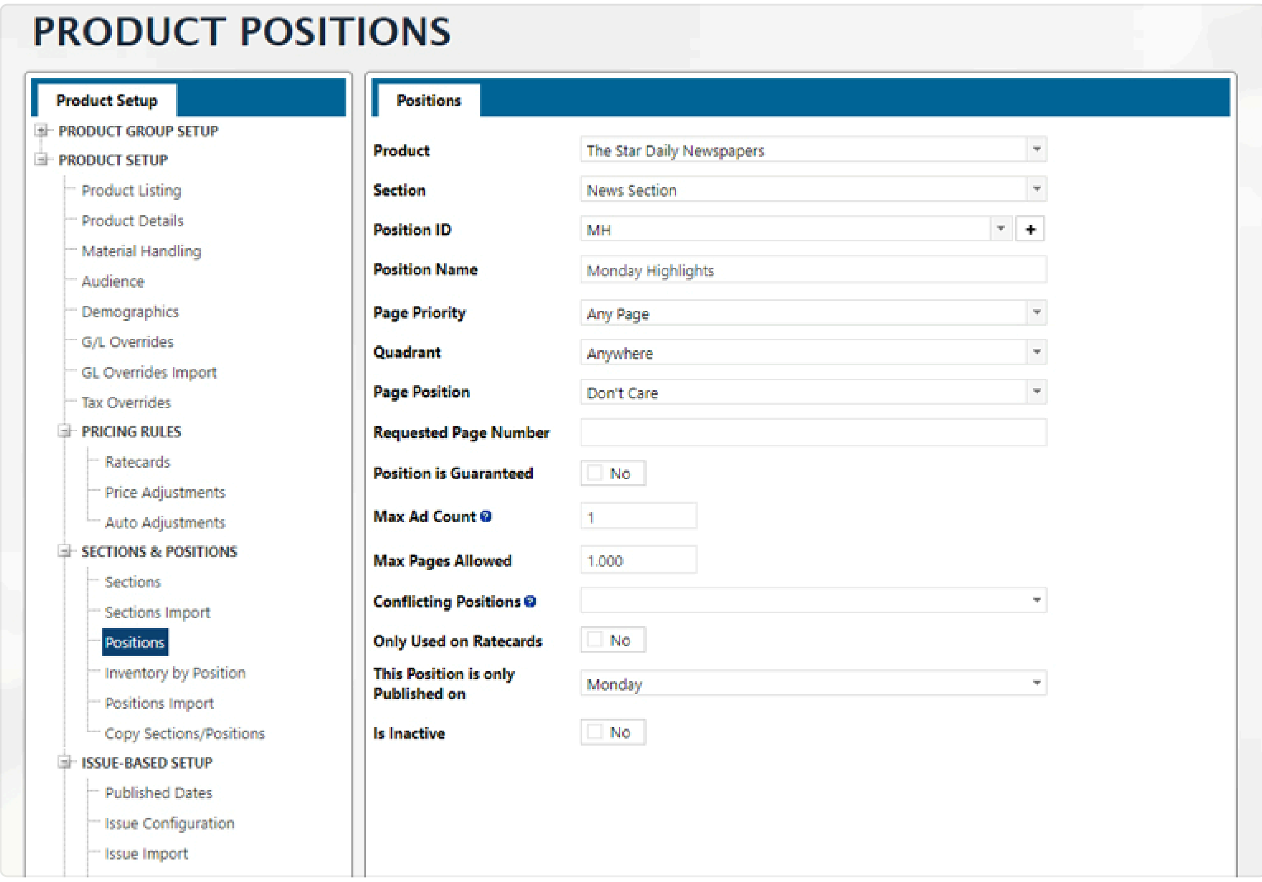


In the below example, these are both auto-generated adjustments based on metadata. The first item is not set to allow delete and the second is allowed to be deleted:



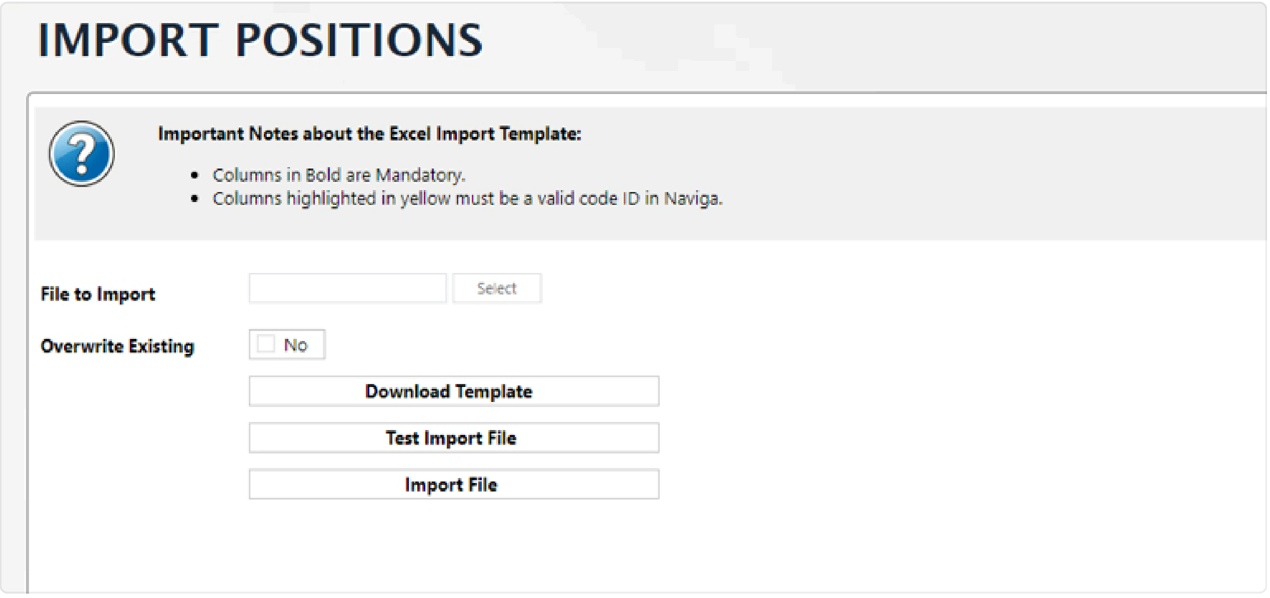
Positions by Day of Week

Sometimes, a position needs to be restricted to only certain days of the week. Perhaps you don't run post-it notes on Tuesdays b/c that is the day you offer something else in that place. On Product setup, on the Positions node, you can now indicate that a position is only published on certain days of the week. Leaving this field blank means that it is valid any day that the section and product are valid.



This new field is available on Position setup and also on Position Import, so if you are importing positions, be sure to download the new template to get the new column.

To import, on product setup, select Positions Import and then Download Template button will get you the latest template

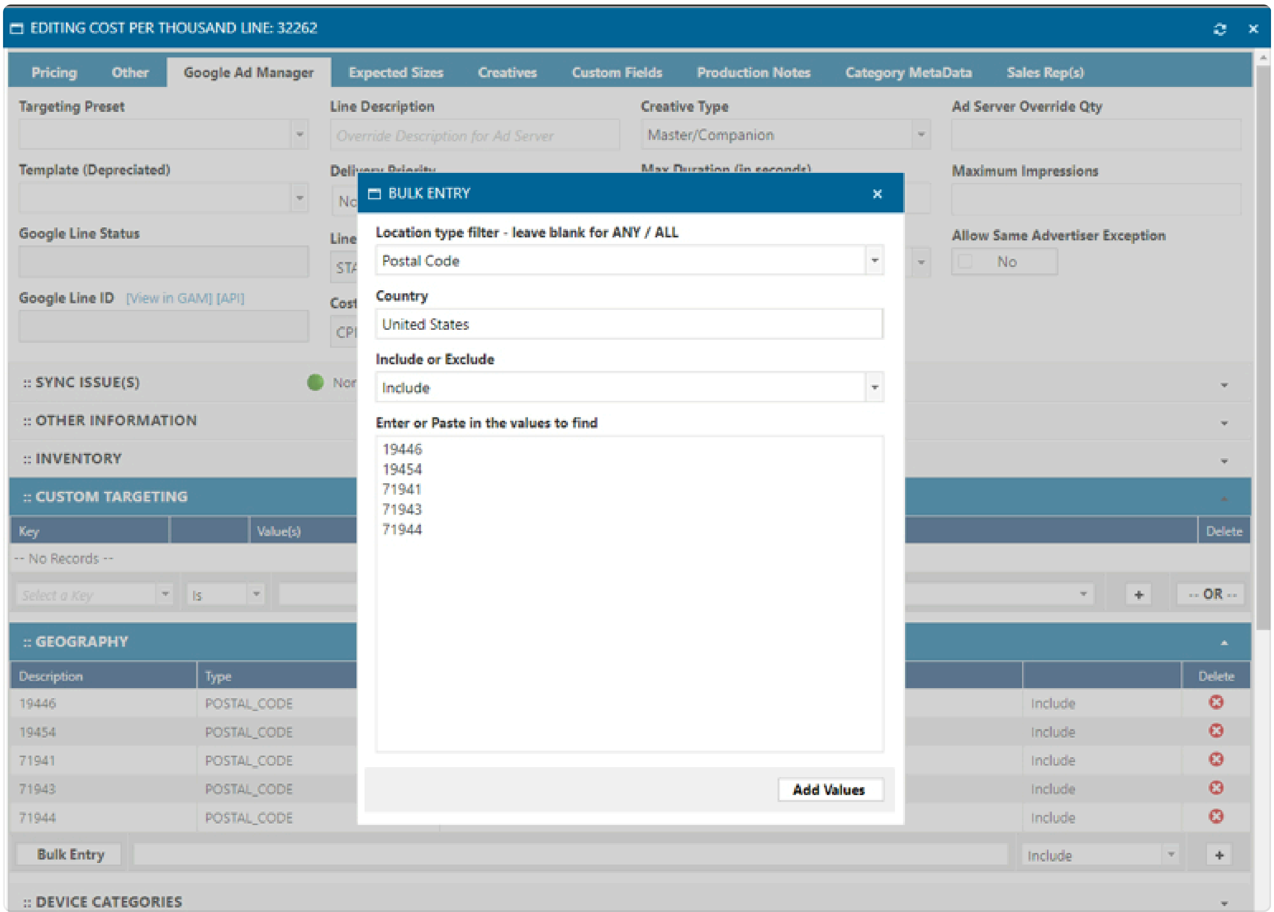


The days of week can be added as MO,TU,WE,TH,FR,SA,SU - if it is valid everyday, the day of week can simply be blank and it will be valid every day. See **Importing Sections and Positions** for more details on importing sections and positions.

GAM - Related Items

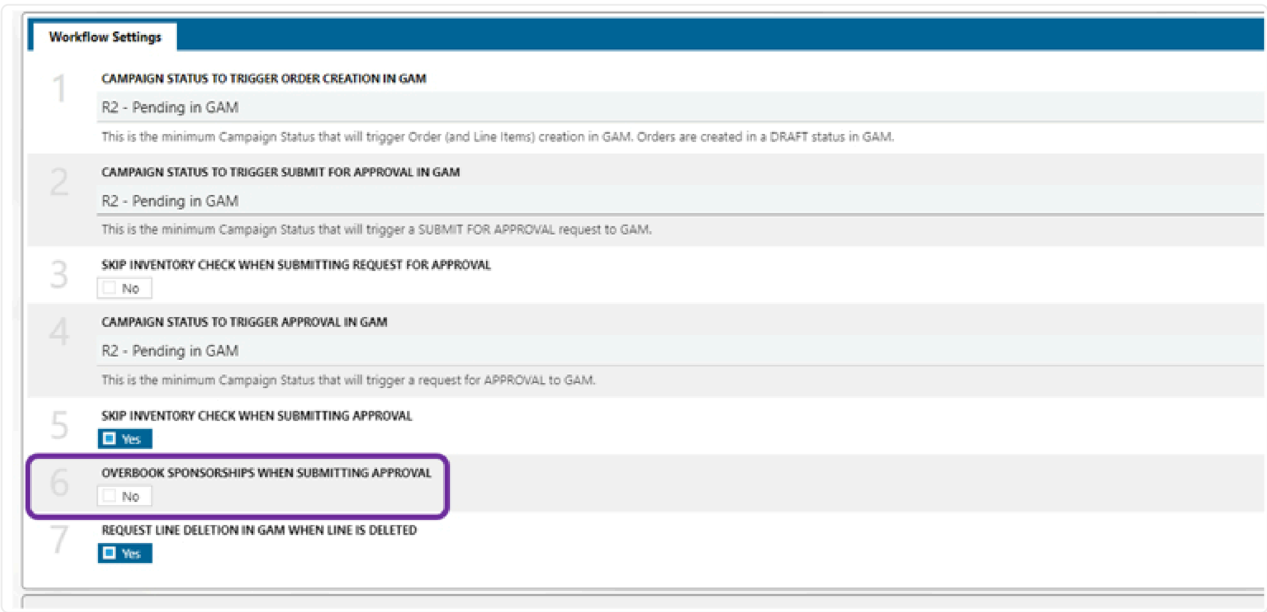
Bulk Enter GAM Geo-targeting with Copy and Paste

Naviga Ad has supported Bulk Geo-targeting for quite a while. New for this release is easier copy and paste when bulk entering from a spreadsheet. Previously, this list was expecting a comma separated list, but now one can enter a list like this (copied from a list in excel) and it will understand that the returns on each line indicate that it is a new record.



Overbook Sponsorships when Submitting for Approval

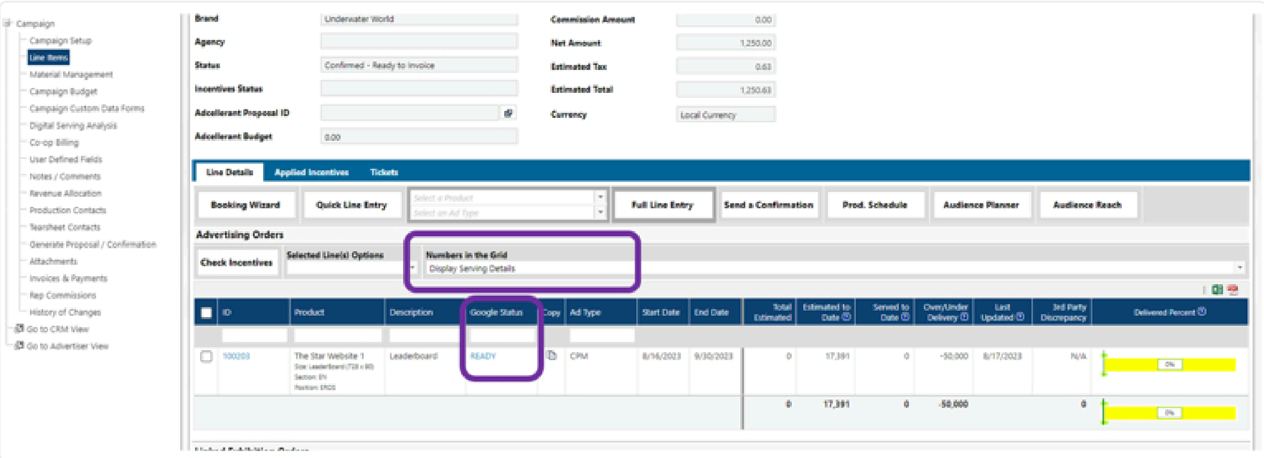
While this WAS able to be patched back to 23.3, it wasn't there when 23.3 was first released, so adding to the New Features list in 23.4.



This setting is only taken into account when the order goes for approval. It first does the normal approval at the campaign level but if this option is selected, it does a 'reserve with overbook' at the line item level (just for sponsorship lines).

Display GAM Status on line item 🎬

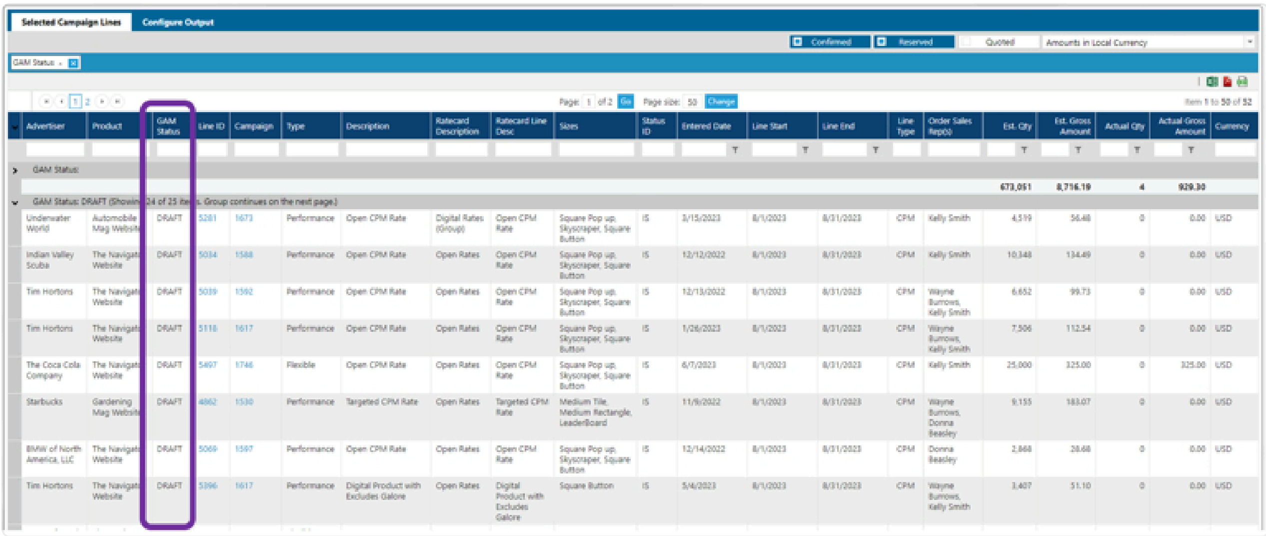
In the order entry Line Items screen, if you are viewing Serving details on screen, you can now see the Google Status of each line:



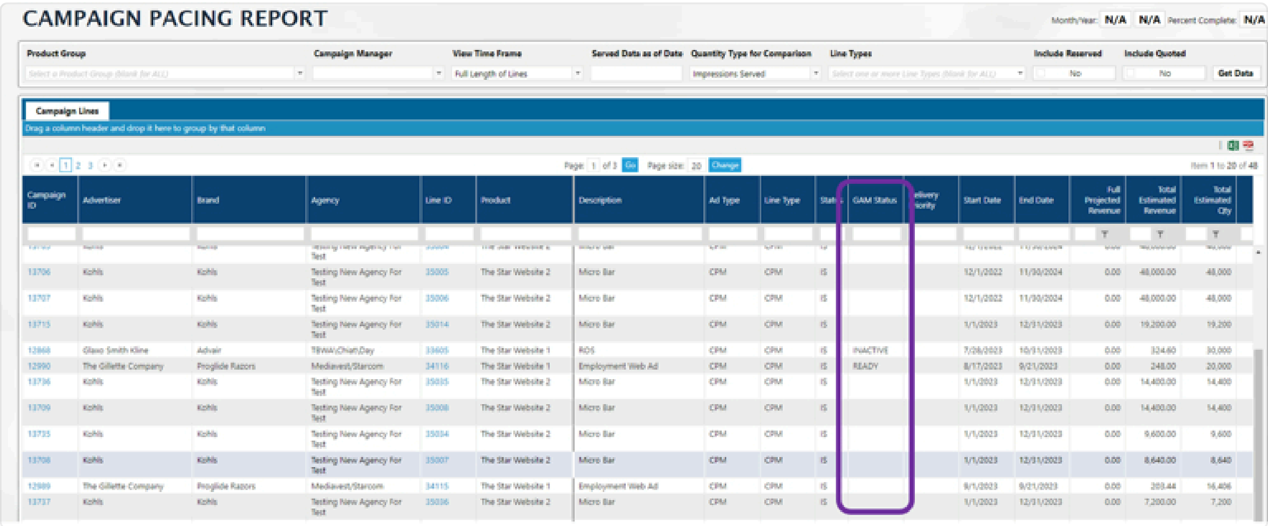
The status is a hyperlink, so the user can click on it and be taken to that line item in GAM. (Contingent on that user having permissions to access GAM, of course.)

Display GAM Status on Orders by Product Report & Pacing Report 🎬

GAM Status has been added as a new option on the Configure output tab on the Orders by Product report. Couple this with the new grouping available (described **below**) and you have a handy way to see what orders are Ready/Delivering/Draft/etc.



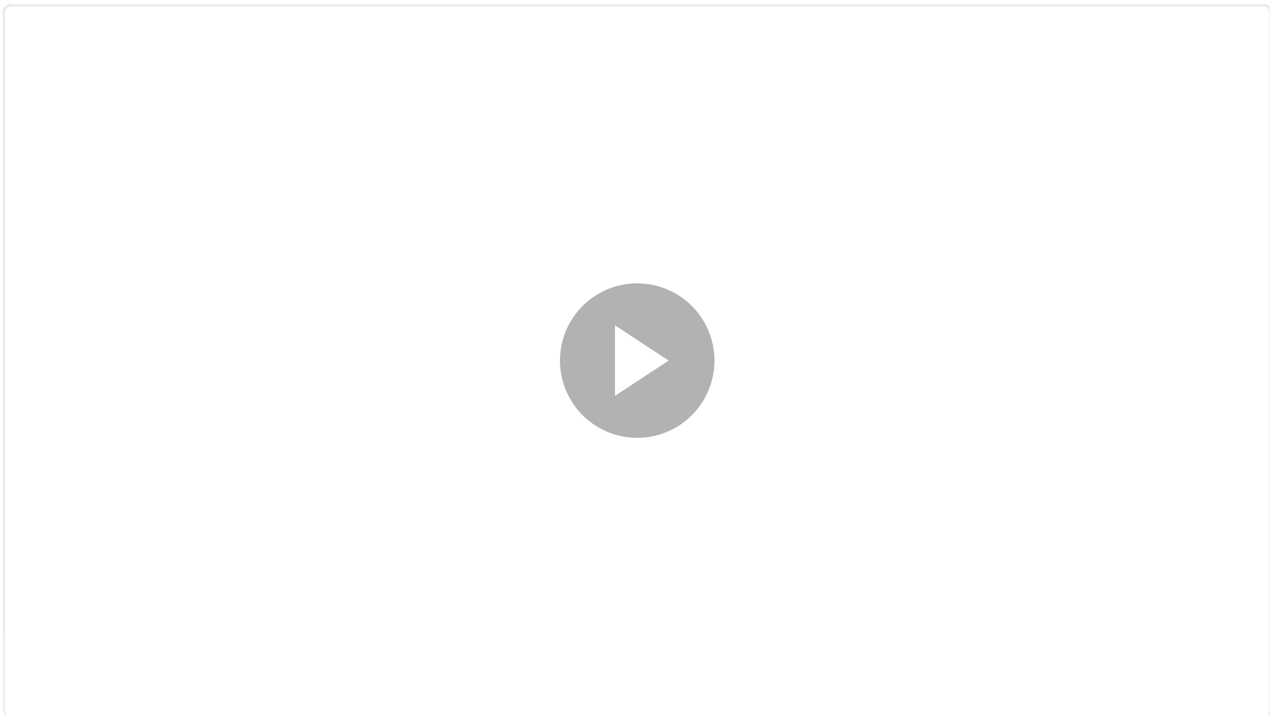
In addition, it has been added to the Delivery / Pacing Report as well. The Pacing report can be found under the Campaigns menu in Advertising module.



Change to Bulk Update Campaign Status

This change was added in early August and was patched back to 2023.3, and since it was a pretty noticable change, we also put a video up on the login screen so that users would be alerted that something was new. In case you missed it, I have added the video in here as well (for your viewing pleasure)

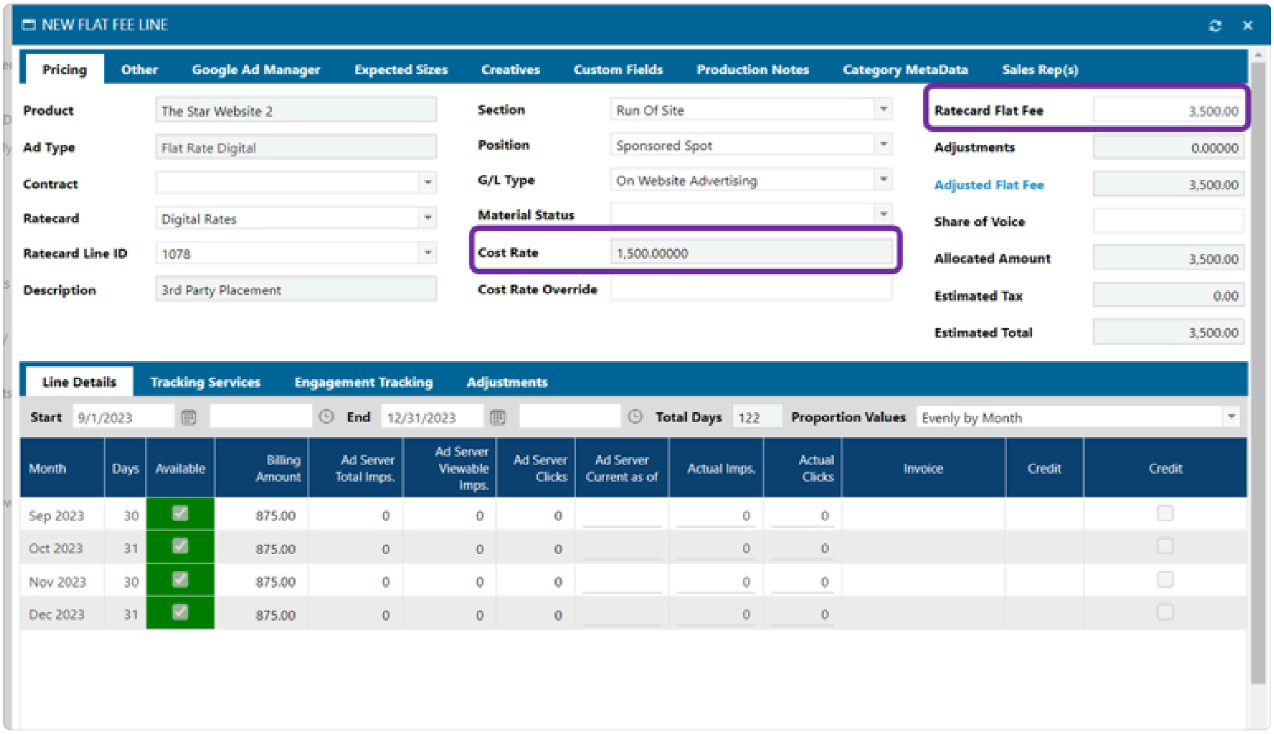
The change was to give the option to honor the top of column filters when doing the bulk update.



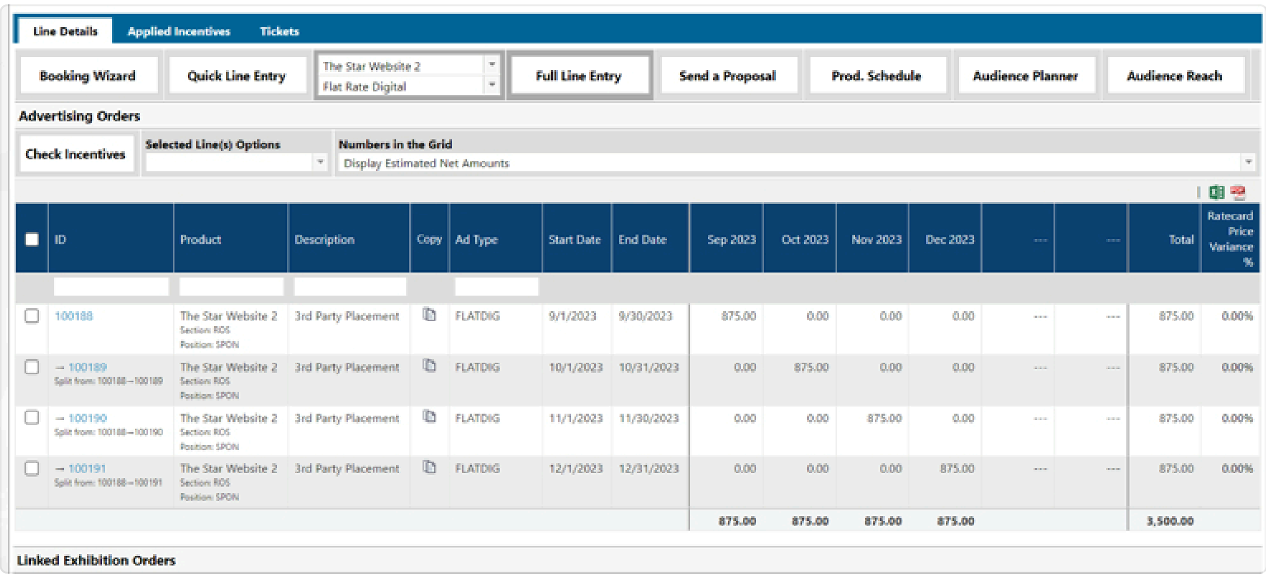
Cost Tracking on Flat Fee Lines

In 2023.1 we introduced the idea that you could track costs on a campaign line. At the time, this was just for CPM/CPC lines where you are perhaps working with a 3rd party and while you are selling it to the client at $x CPM, you have to spend $y CPM to secure that inventory. This doesn't affect the invoice to the customer at all, but can optionally cause additional G/L lines for allocating those costs.

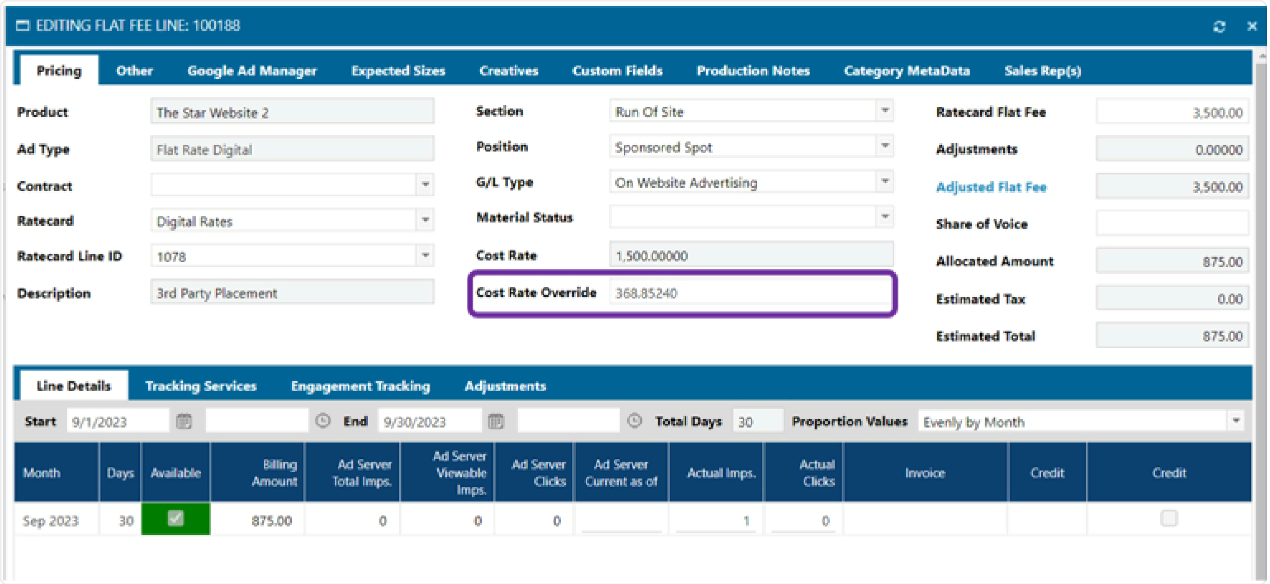
Now, in 2023.4, we are also allowing this concept for a flat fee campaign running across several months. Take the example below:



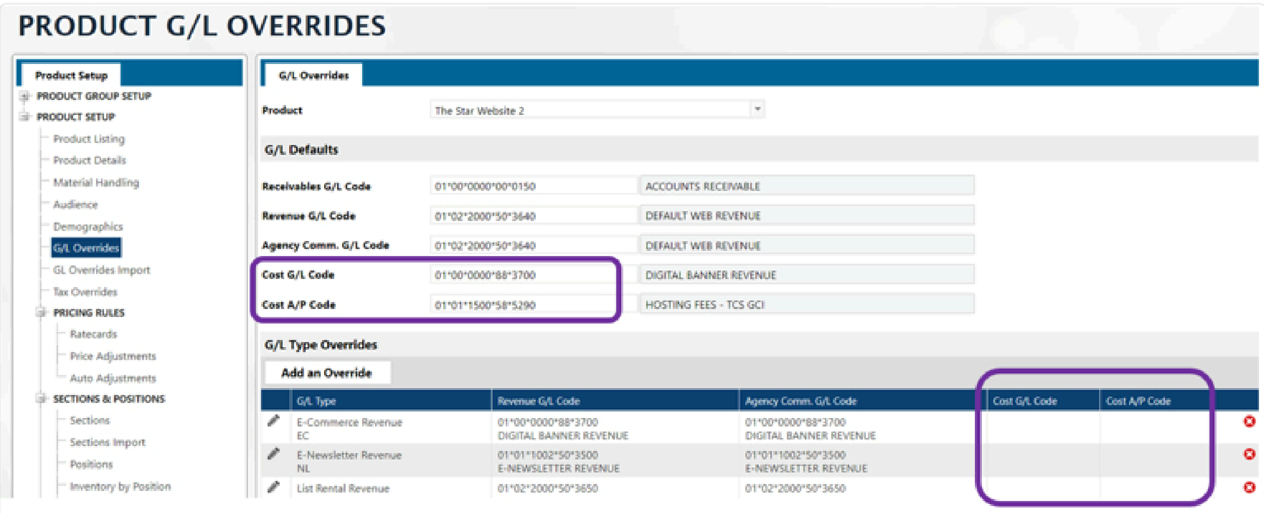
The price of this ad to the advertiser, is a flat $3,500 but the cost to supply it is $1,500. The $3,500 is divided across the 4 months of the campaign, as is the $1500 of cost. In this example, the product is set to split lines in Product Setup. So upon save, the campaign looks like this:



Open up any one of the above lines and you will see the Cost Rate override for that line is the split amount for that month (prorated according to the number of days in that month, so there will be month to month variation of the cost.



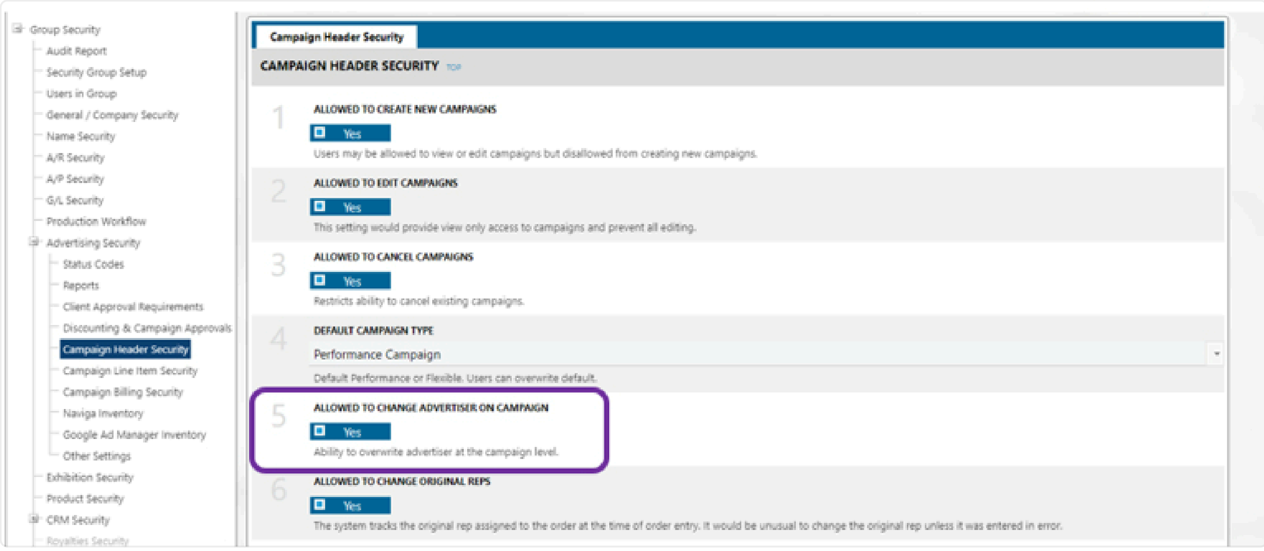
When the billing is run, the Cost will be debited and credited to the G/L's as setup in Product G/L Overrides:



Group Security Changes

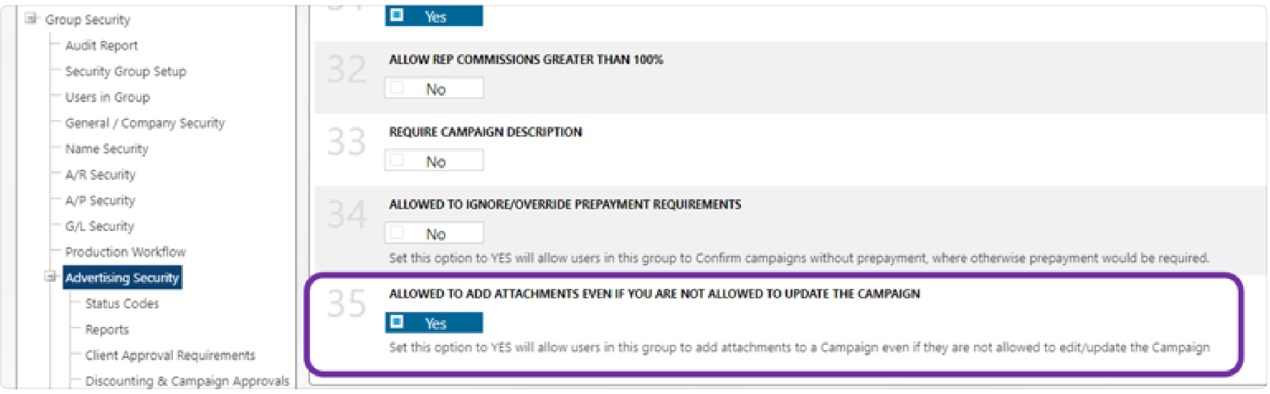
Advertising Security -> Campaign Header Security

New option will allow or prevent user to change the advertiser on a campaign. By default this will be set to NO, so upon upgrading if the desire is to have the system behave as it did before **you will need to update this to "yes"**. If there are any user groups you wish to restrict from doing this, simply leave this to 'no' for the user group(s).



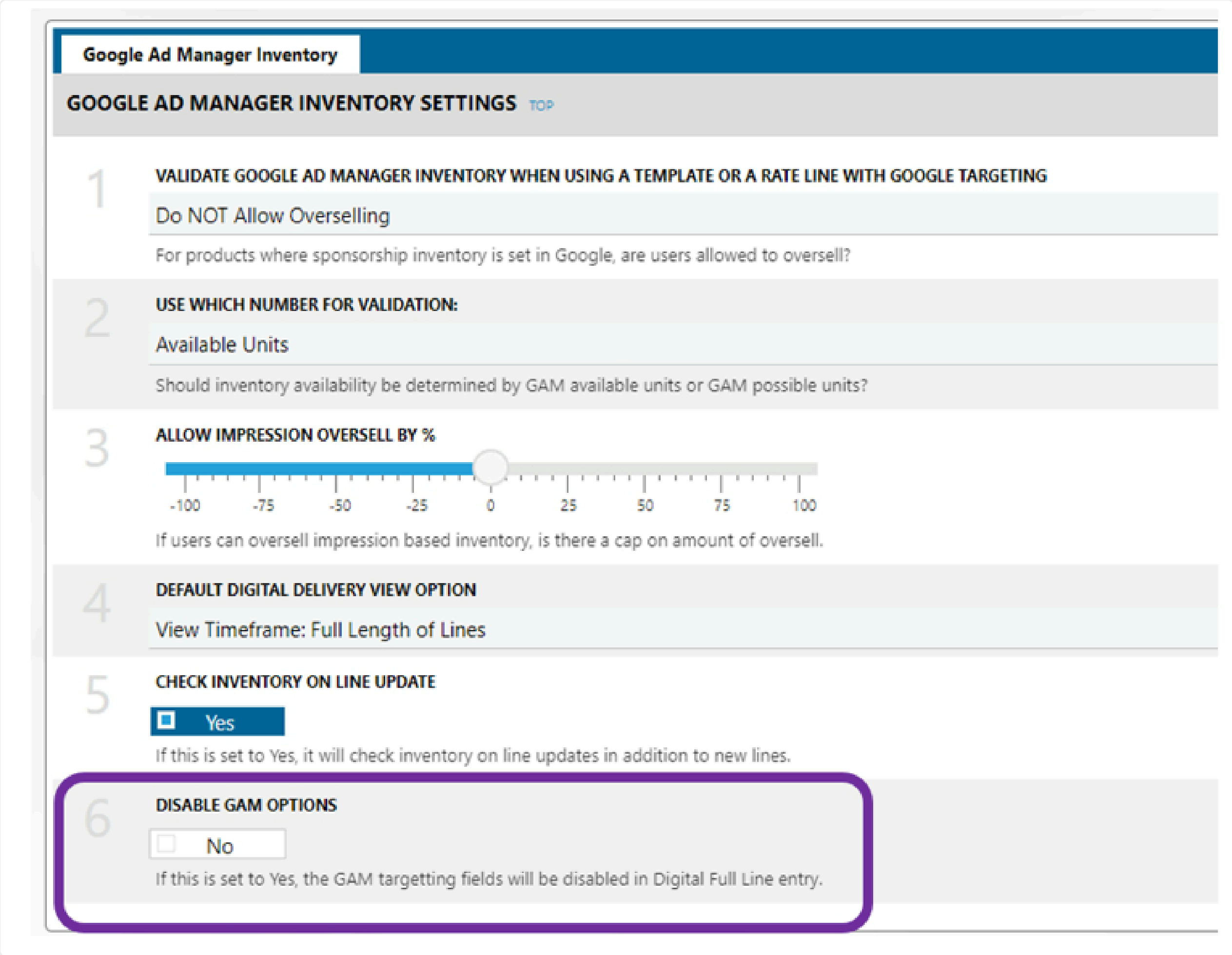
Upload Attachments

Another new item in Campaign Header Security - this one allows you to control who can add attachments to a campaign. Previously this was simply controlled by the user's security to edit the campaign itself according to the status that the campaign is in. This will go a step further and allow the user to still add attachments to the Campaign, even if they can't edit other items on it (generally needed because the campaign is confirmed and a physical IO came in late or something like that). This was patched back to 23.3 as line item #34. In 23.4 we had another new item added above so this now becomes #35.



Disable GAM Options

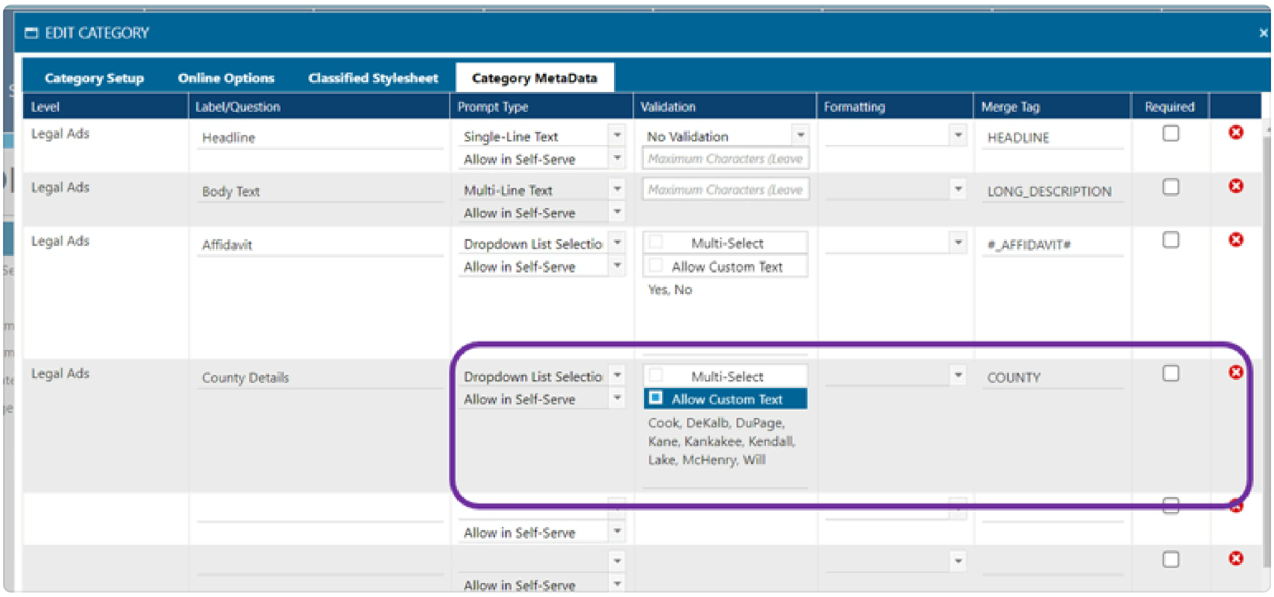
Previously this was put in as "Hide" GAM Options, but the client who originally asked for it didn't actually want them hidden, but rather disabled, so certain users could still see the settings but not modify them, so that has been changed in this release.



Affidavit Template Merge Tags for Metadata

Metadata from order entry can now be added to the template for display on an Affidavit.

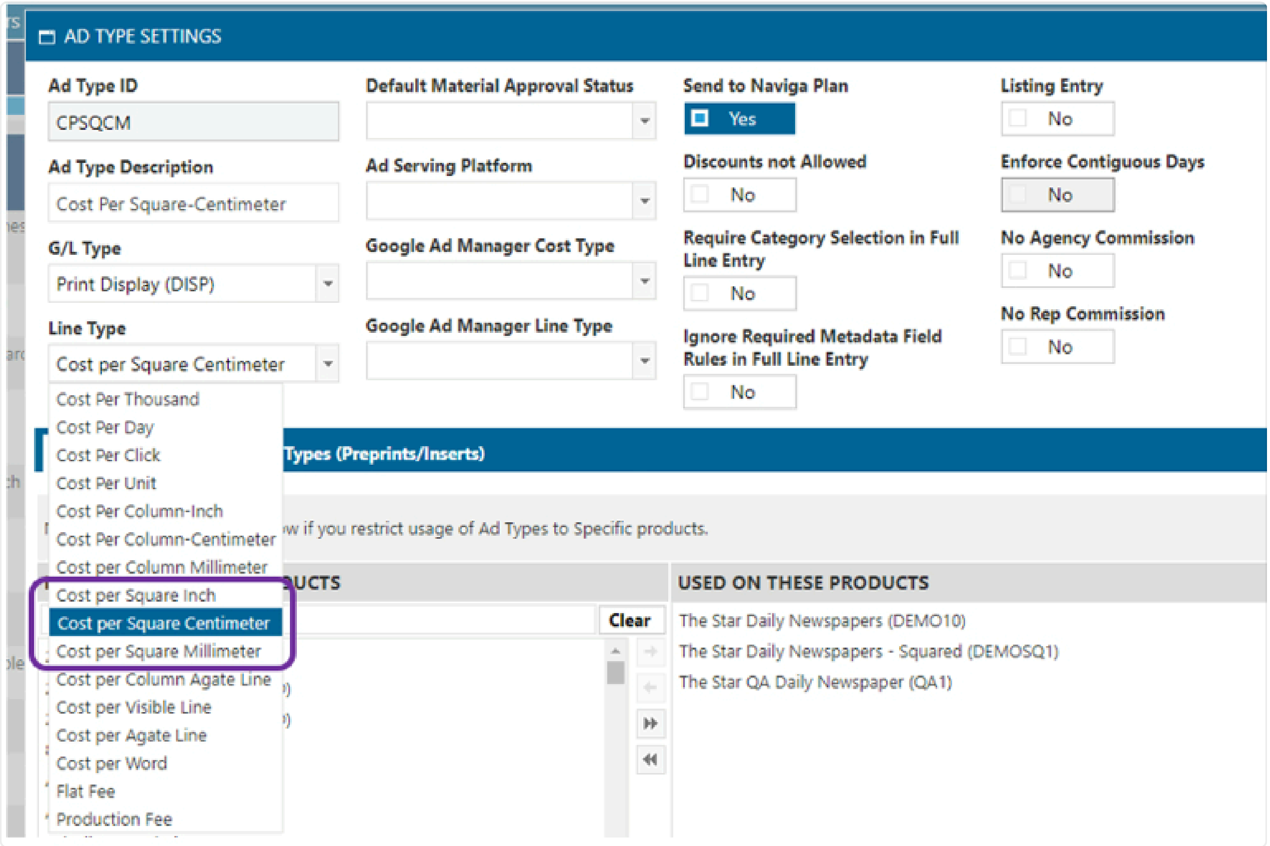
In this example, it was desired to add County to the affidavit, but that was something that could change order to order, so the user was asked to supply that information during order entry:



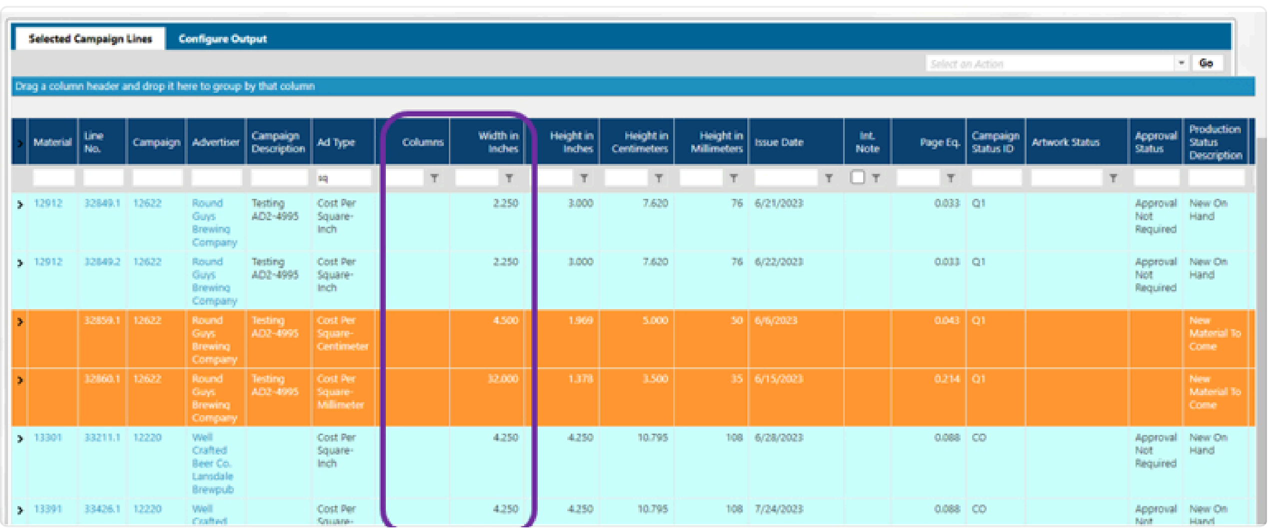
Note that the Merge tag is COUNTY. To then utilize that tag in the affidavit template, place an underscore in front of the Merge Tag. (This is used to identify that it is a metadata tag in the event that someone uses the same merge tag name as one of the standard tags)

Support for Square Inch/CM/MM measurements

Support has been added in Ad Type Setup, rate card setup, and in various reports in the system to allow for booking and billing by square measurements rather than column measurements. While Column Inches are standard in the North American market and Column CM/MM are standard in Europe, there are some areas in the world where it is more common to charge by the physical dimensions of the ad, for example, in Square CMs. Support for this has now been added. You will find it on the Ad Type setup screen:



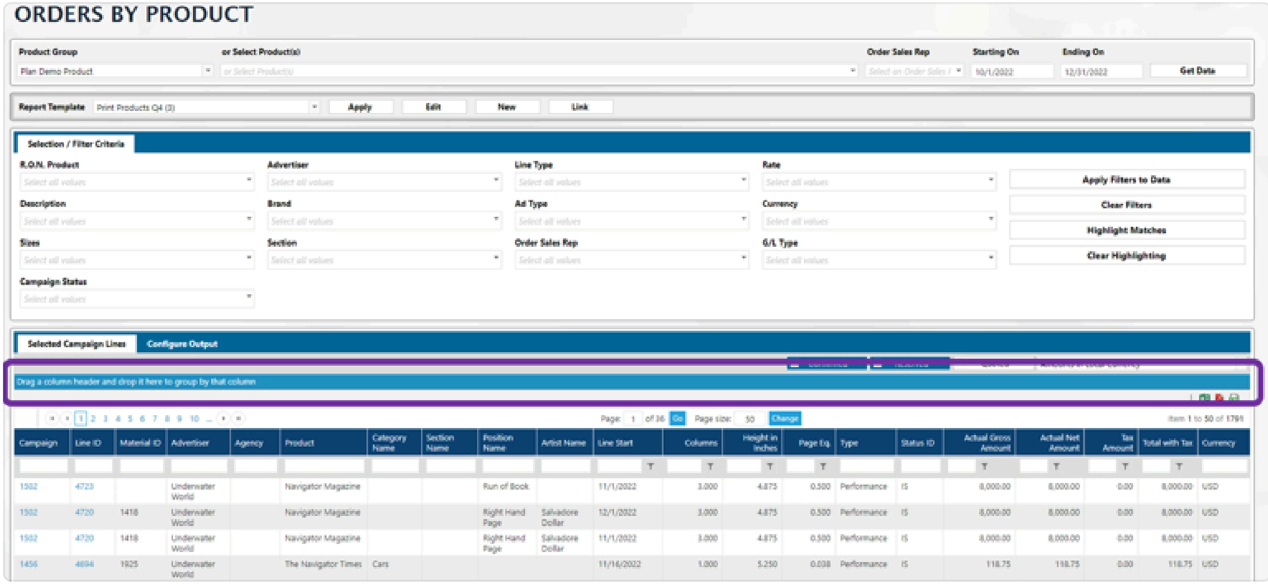
For anything that has been booked in Sq measurements, you will find production reports and orders by product report to reflect the physical width appropriately. Columns will be blank since it isn't measuring by number of columns:



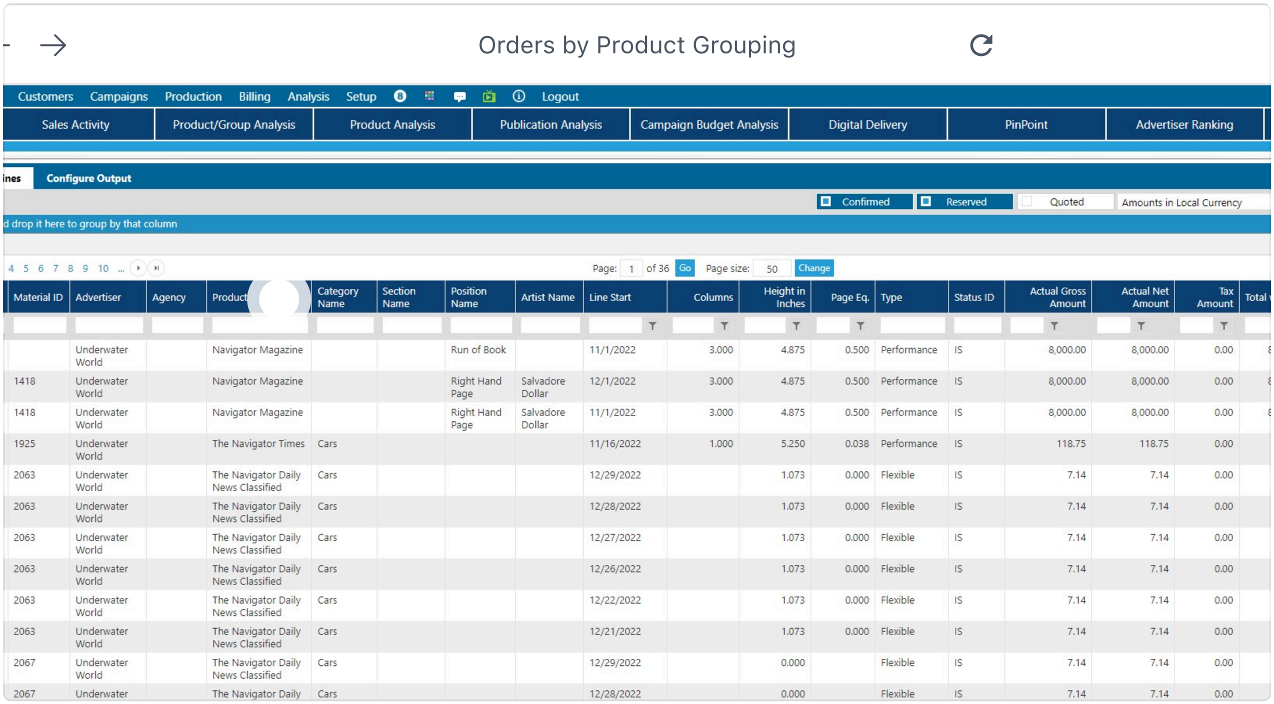
Orders by Product Report

Grouping

Minor change to the Orders by Product report is new for 23.4, but was able to be patched back to 23.3, so you will see it there as well. The light blue grouping bar that you see on some other reports throughout the system has been added to the Orders by Product report as well. Simply drag and drop a column header to the light blue bar and the report will be grouped by the data in that column.

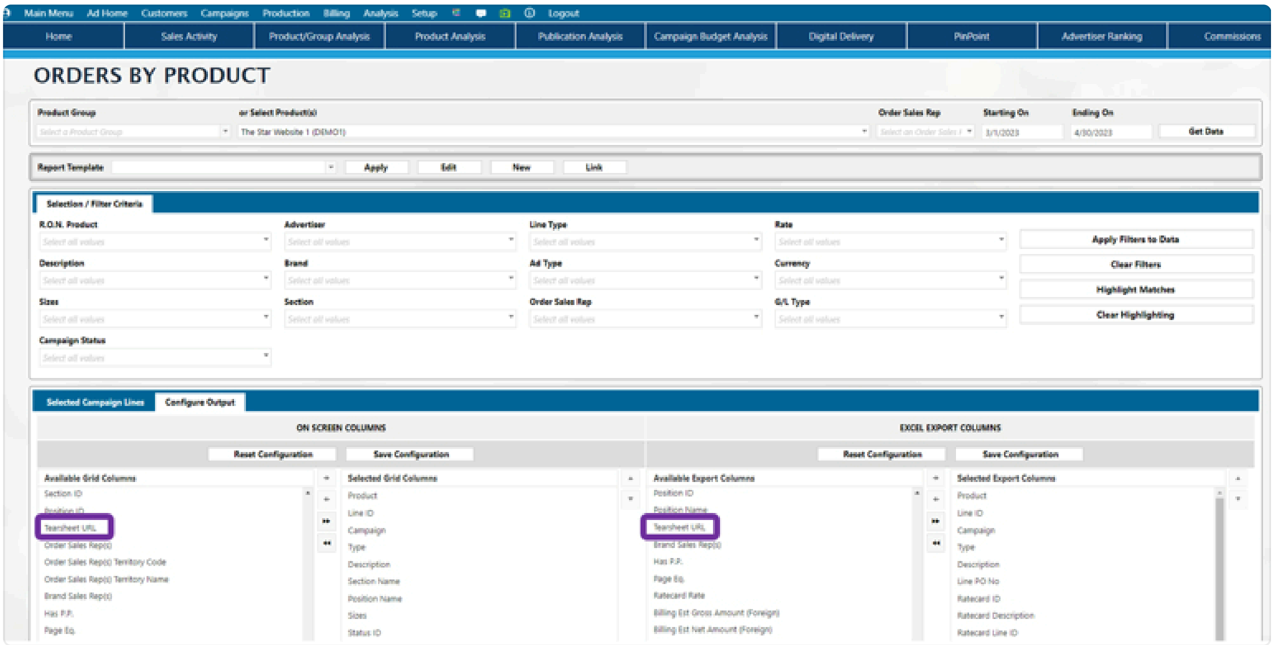


For example, dragging "Product" header into the blue bar will group the search results into groups of products, which will then be subtotaled:



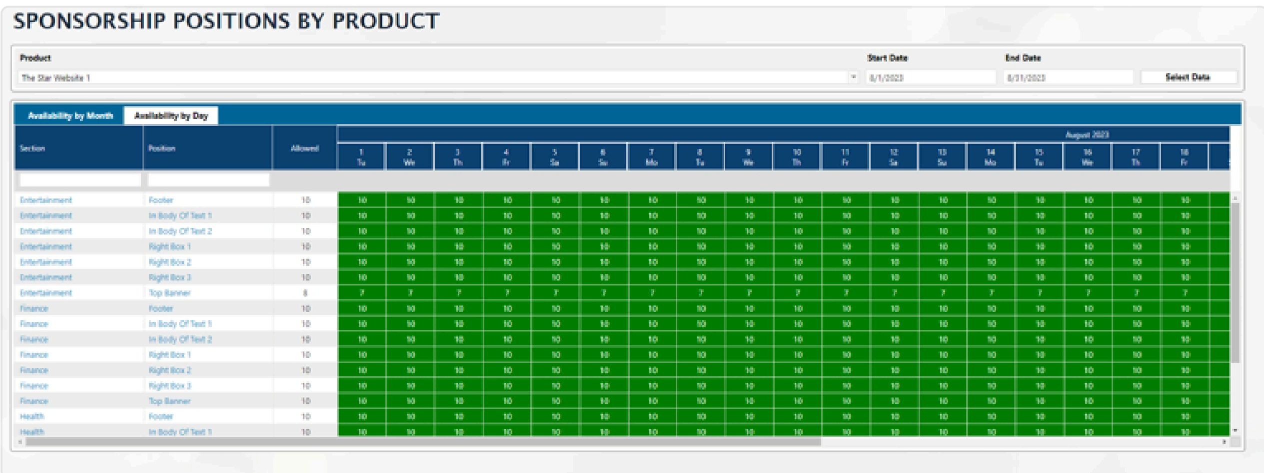
Additional Field

The Tearsheet URL field, which can be edited on the Update Pages Numbers on an issue report and can be displayed as a link on an invoice, will also now be available for display on the Orders by Product Report (can be added to the on screen display and/or the Excel download.



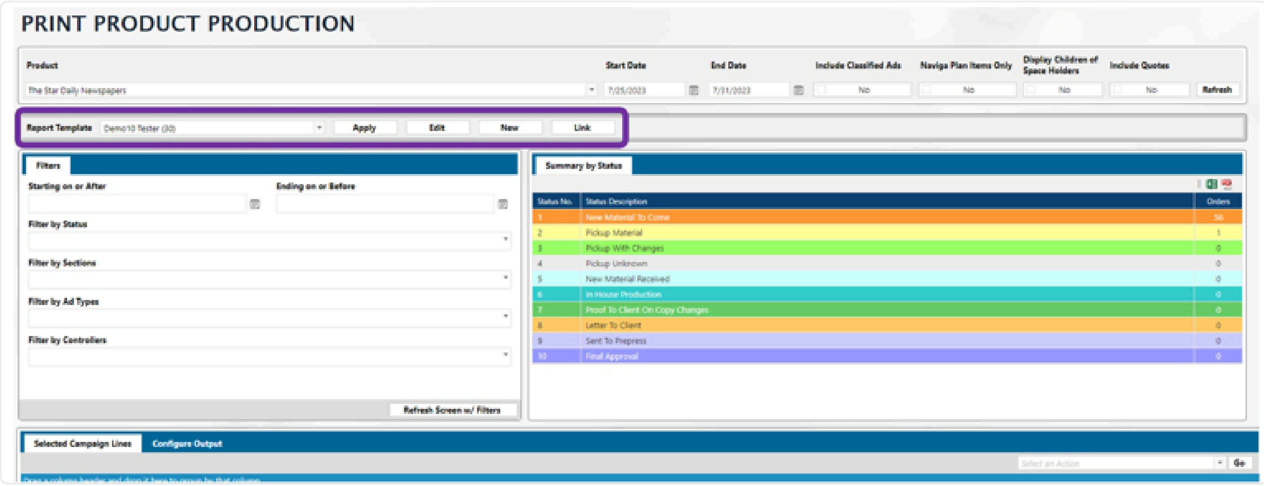
Sponsorship Positions by Product

In prior releases, this report only displayed the positions. Now we have added a column for section as well. There is a filter at the top of the grid to filter results if desired.



Print Product Production Report

The concept of Report Templates has now been added to the Print Production Report. It was previously on the Production by Product Group and the Orders by product report.



See **Orders by Product Report** for details on how to use report templates

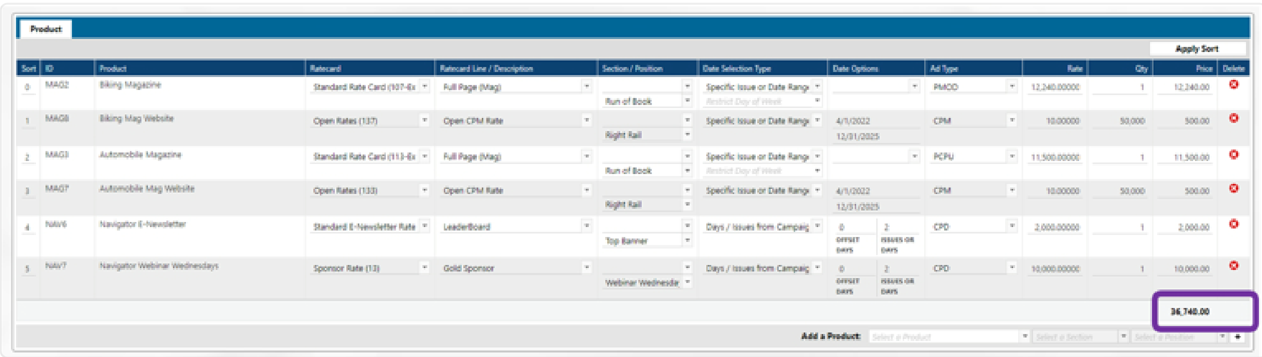
Another small change on this report - the Max Component Count is now available as a display field on this report. The Max Component Count was added in 2023.3 to limit the number of child orders that can be linked to a spaceholder campaign. See New Features in 2023.3 for more details about using this feature.

All Production Reports

Campaign Start and End dates have been added as an optional field to the Production Reports. This includes The Production by Product Group, Production by Product (non-print), Production by Print Product, Production by Controller and Production by Sales Rep.

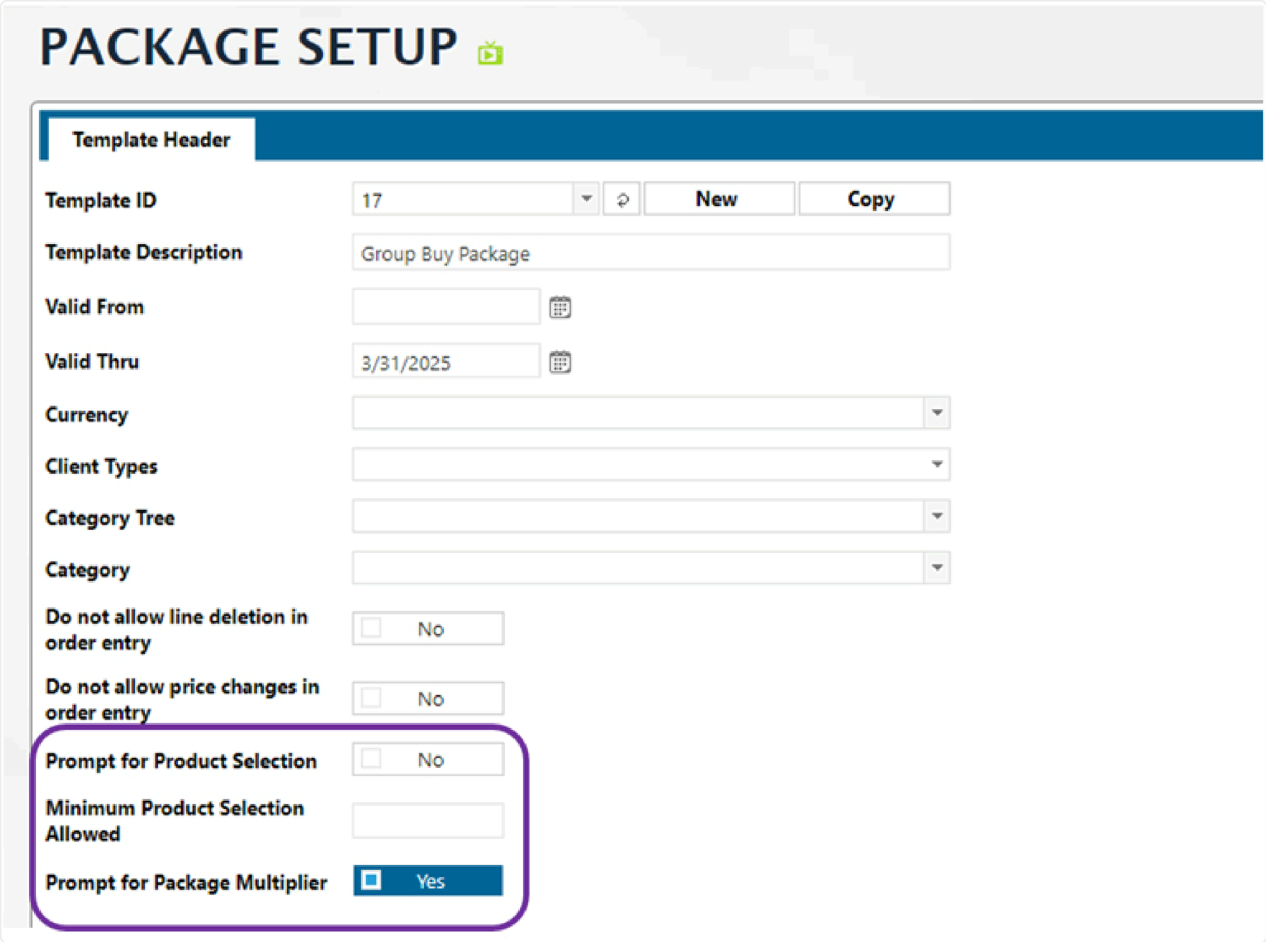
Package Setup - Total

This was a minor change, so we patched it back to 23.3 as well for a site that needed it. The grid at the bottom now includes a total. This is intended to help the user setting up the package to double check their math and ensure they didn't make a typo.

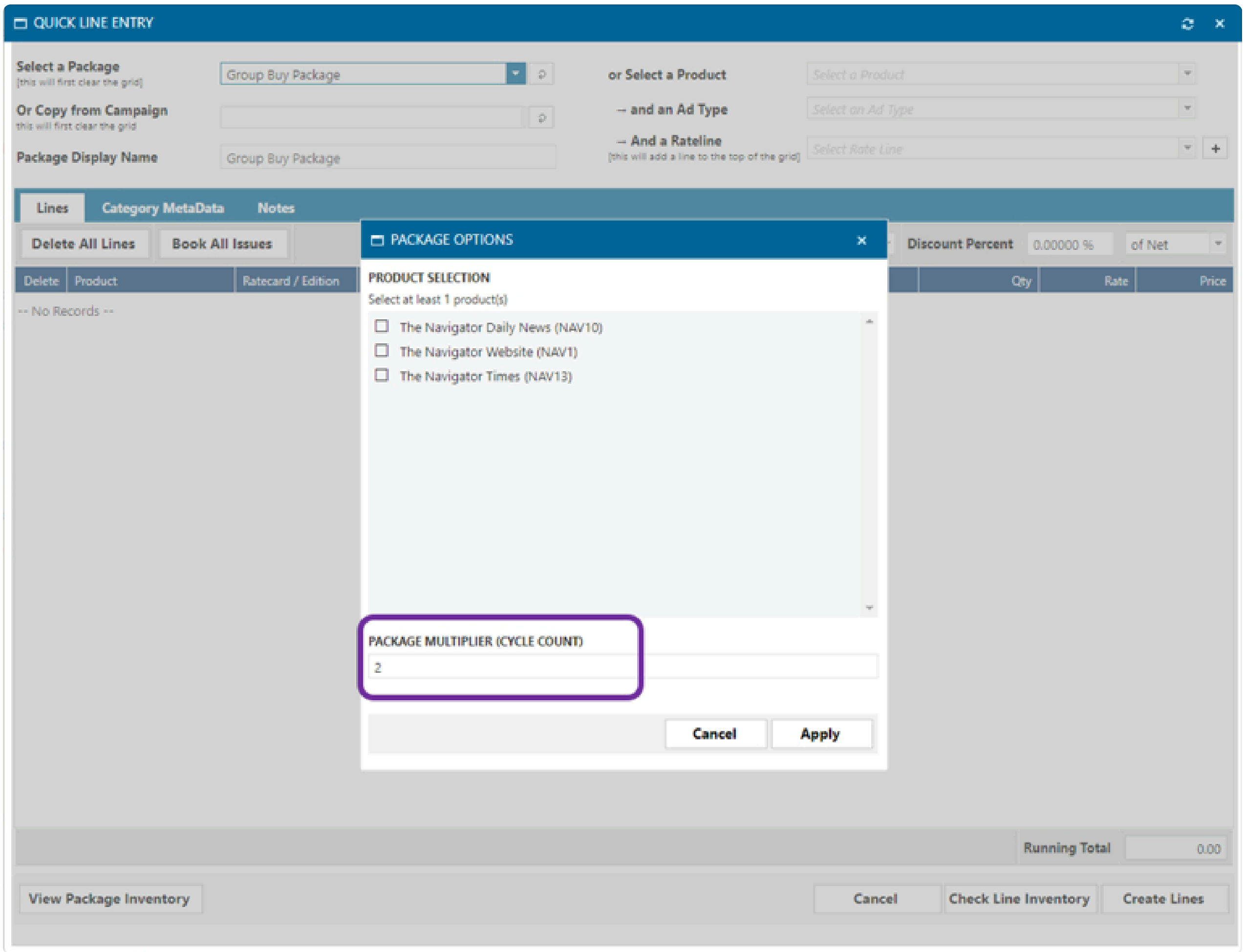


Package Multiplier Change

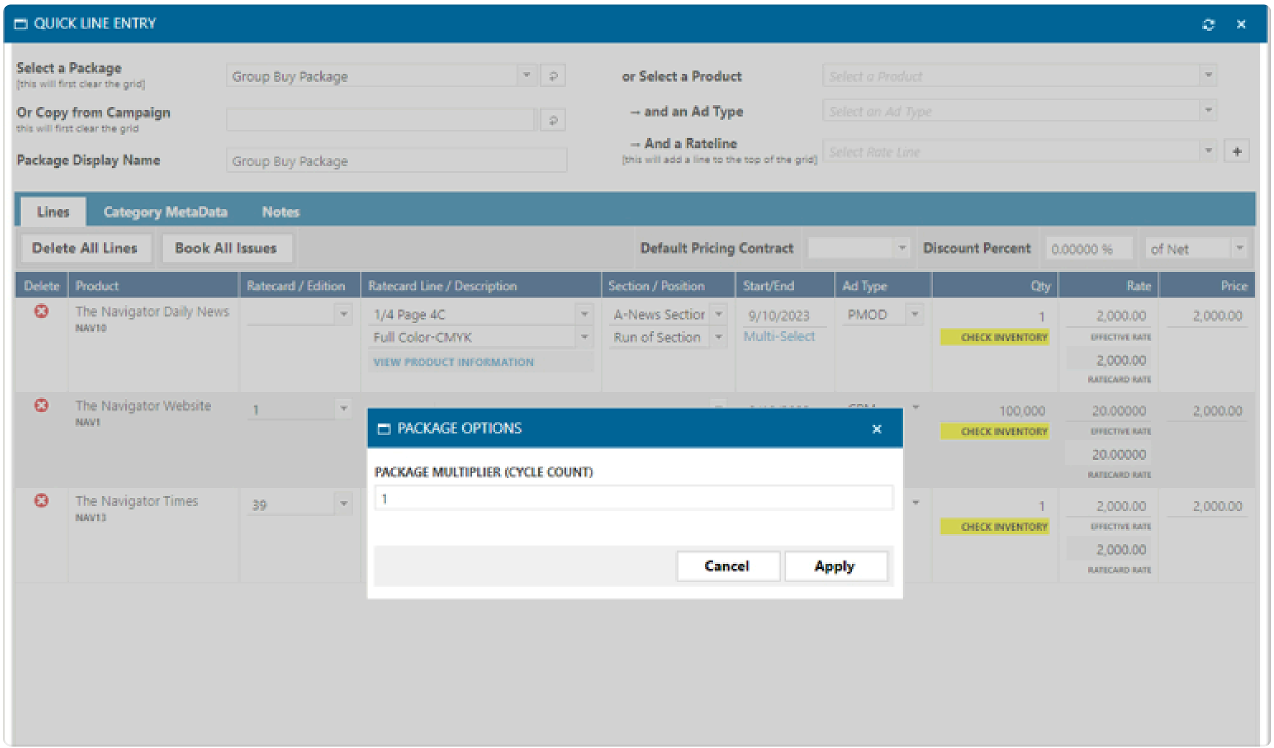
In previous releases the concept of a package multiplier was only used in conjunction with the product selection. Those two choices are now independent of each other. If you only have Prompt for Package multiplier selected in this section, then you will no longer see the choice to select one or more products:



In previous releases, the above package settings would show this in order entry:

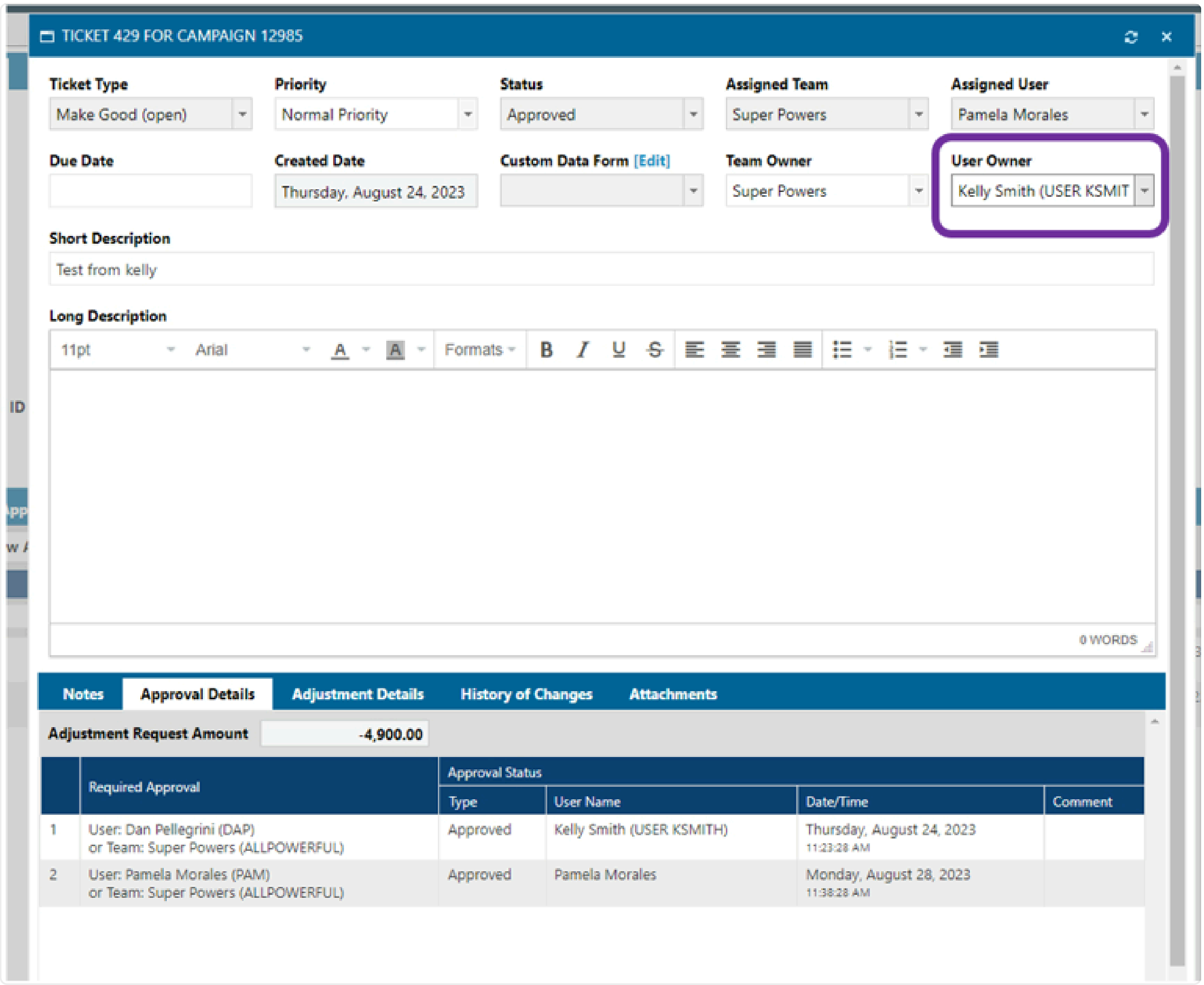


Beginning in 2023.4, to continue to see the above selection, Prompt for Product selection would also need to be set to yes in the package setup. With only Package Multiplier set to yes, the user prompt now looks like this:



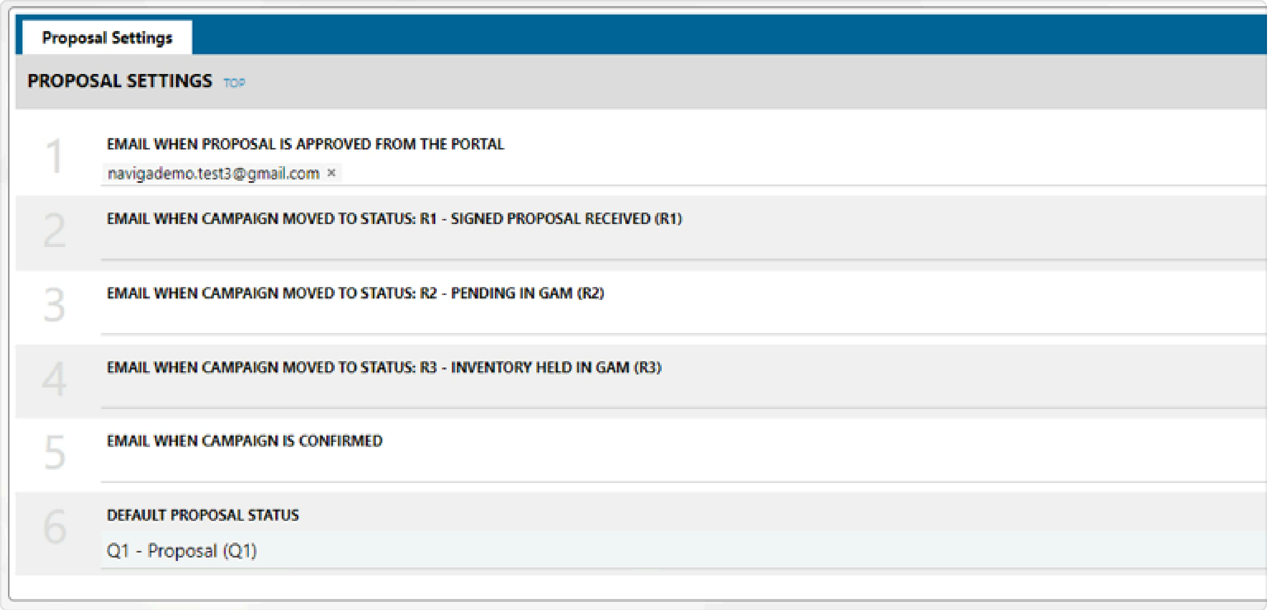
☑️ Email Sent to Ticket Owner Upon Adjustment Ticket Final Approval 🎬

In Adjustment ticket routing and approvals, in previous versions we sent an email whenever the assigned to user changed. The email would go to the newly assigned user to alert them that a ticket was needing their attention. Depending upon setup, it might also go to the assigned team. However, once the final approval was granted and the system created the adjustment, there was no assigned to user change, so no emails were sent. Now, upon final approval Naviga Ad will also send an email to the User Owner so that the person who created the ticket will be aware that it has been approved.



Email sent when Campaign status changes to Reserved/Confirmed Statuses

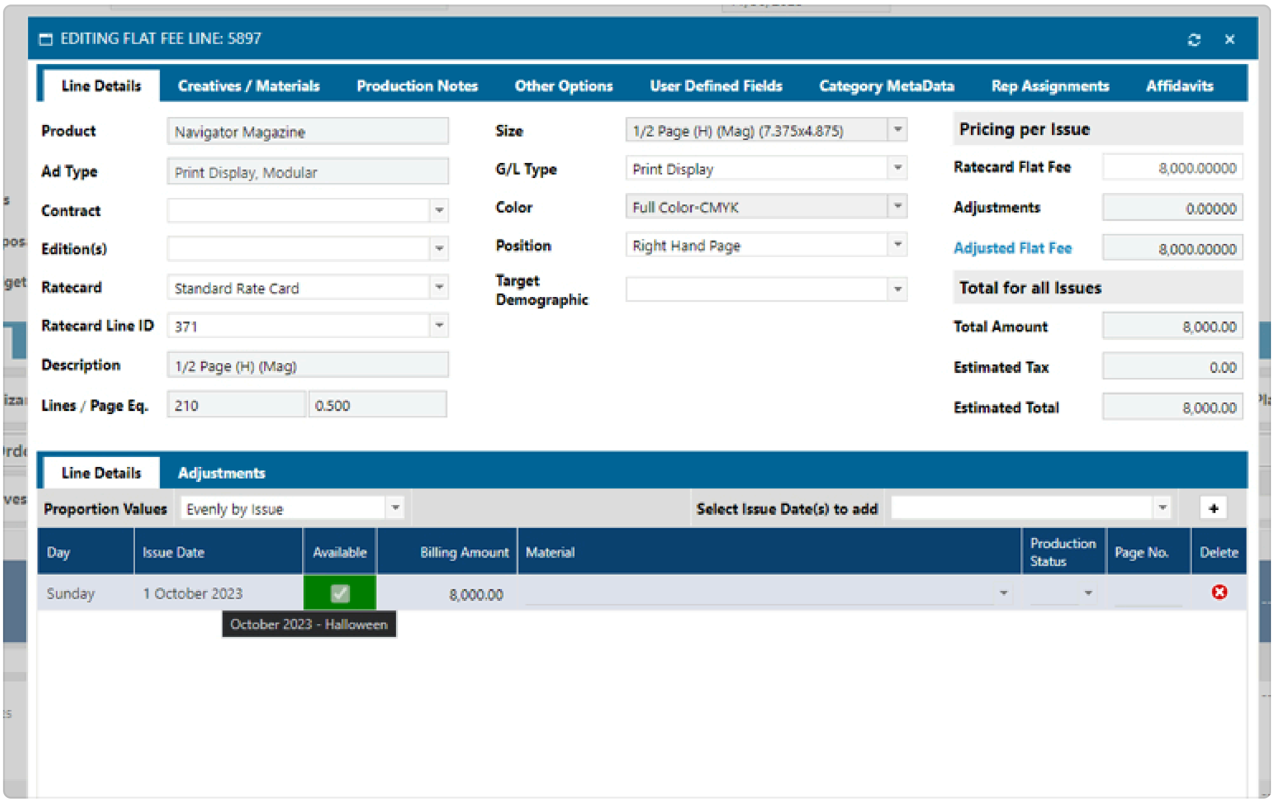
In User Security on the Rep/User Integration node, there are new options for who to email when a campaign status is changed to R1, R2, R3 or CO (numbers 2-5 below are new)

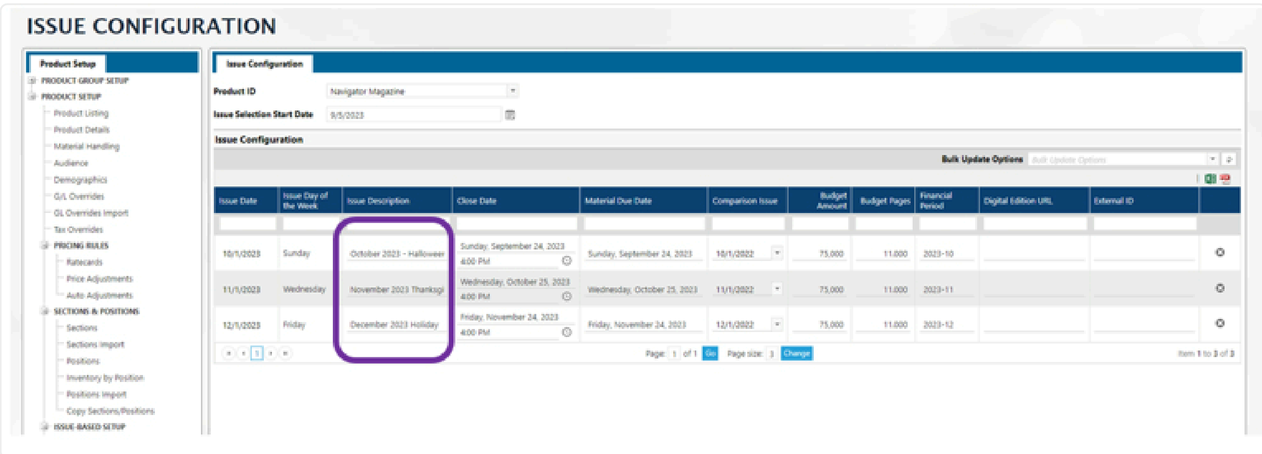


If I am the rep on the campaign, and the status changes to R1, R2, R3 or CO, an email will be sent to whomever is listed in the above fields. The email will be sent from the person who made the change to the person(s) listed here.

✅ Display Issue Description on Hover in Campaign Entry

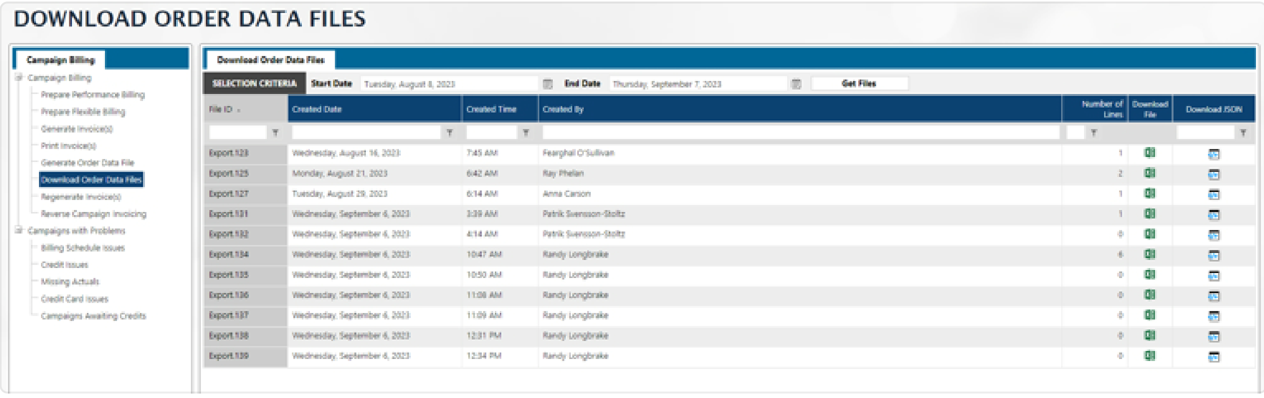
When looking at a campaign line, hovering on the issue date will display the issue description. In the below example, cursor hovered over "1 October 2023" and the "October 2023 - Halloween" description from issue setup was displayed.





Sortable columns on the Campaign Billing export screen

Most Naviga users don't actually see this screen, but for those of you who don't use our A/R module for collections and instead export order data to be invoiced in a separate A/R system, this screen is where they will get the file. An enhancement allows the user to sort by any of these columns in the grid.



PIB Code added to the Advertiser/Agency Import Template

Previously the PIB / Industry Code only existed on the Brand Import (Category ID on that import). For Media companies who typically only used one brand, it made more sense to add the PIB Code to the Advertiser/Agency Import.

In Setup → Admin → System Parameters there is a setting "Set new advertisers to not use multiple brands" - if this is set to NO, meaning new advertisers WILL use multiple brands, this field on the Advertiser/Agency import template will be ignored and the Industry / PIB should be set on the BRAND IMPORT (as it always has).

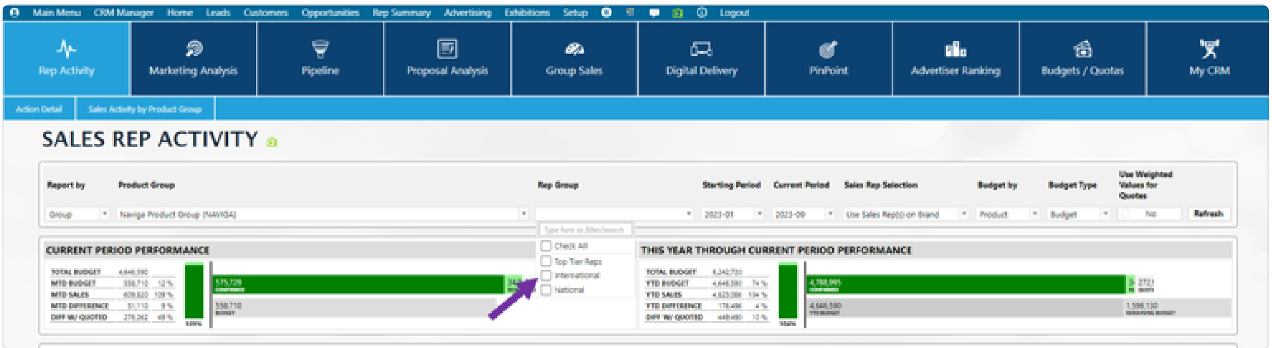
If "Set new advertisers to not use multiple brands" is set to YES, meaning the clients will only use one brand, then that brand will be created and named for the advertiser during this import and the Industry Category set on the import template will be set on the brand. Industry code isn't required on the import but it is advisable to set it. If it isn't set, during order entry, the Industry code will default to whatever is top on the list of Industry codes, which might not be desirable.

The system parameter setting for "Assign Reps at Order Entry" will determine the behavior of the rep setup for this newly created brand. If set to YES, then every order will prompt for the rep to be entered in order entry. If set to NO, then the rep prompt will only be asked on the first order and the selected rep will become the rep for the brand going forward.

CRM Module

Multi-Select Rep Groups on Rep Activity Screen

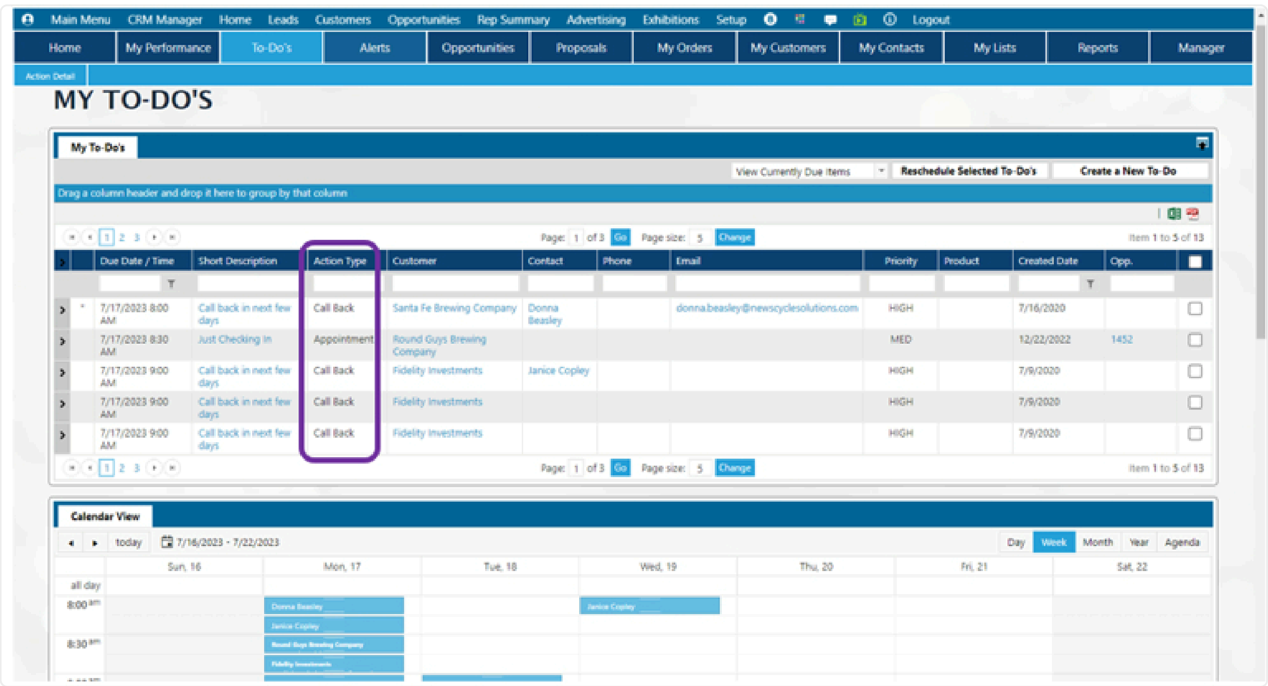
On the manager's rep activity screen, you can now multi-select rep groups.



In previous releases you could select a single rep group at a time, or leave it blank to see all. Now you can also use multi-select the Rep Group. This was able to be patched back to 2023.3, so you will also see it there.

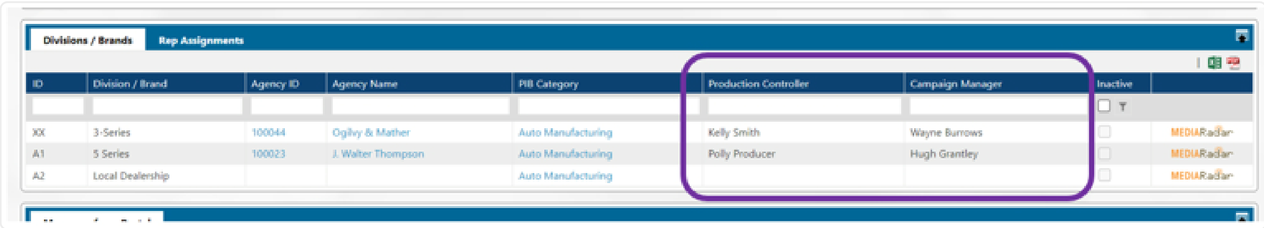
My To-Do's new field

In the CRM Module for a Rep, there is a tile at the top of the screen for "To-Do's." A new column was added to this report to make Action Type visible and filterable on-screen.



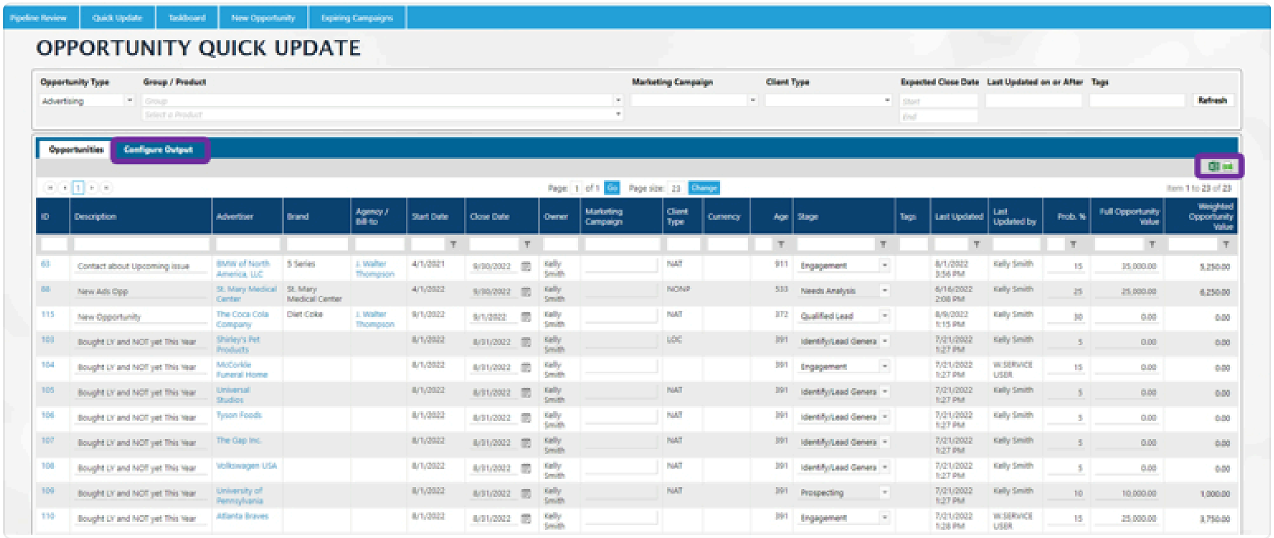
Additional fields on CRM Account view

When viewing the details of a customer account in CRM, in the Divisions/Brands section, there are two additional columns displayed here. Previously, these were only available in Brand Maintenance screen. The Brand's Production Controller and Campaign Manager, if configured on the brand, will be displayed in here. This was also patched back to 23.3, so you will also see it there.



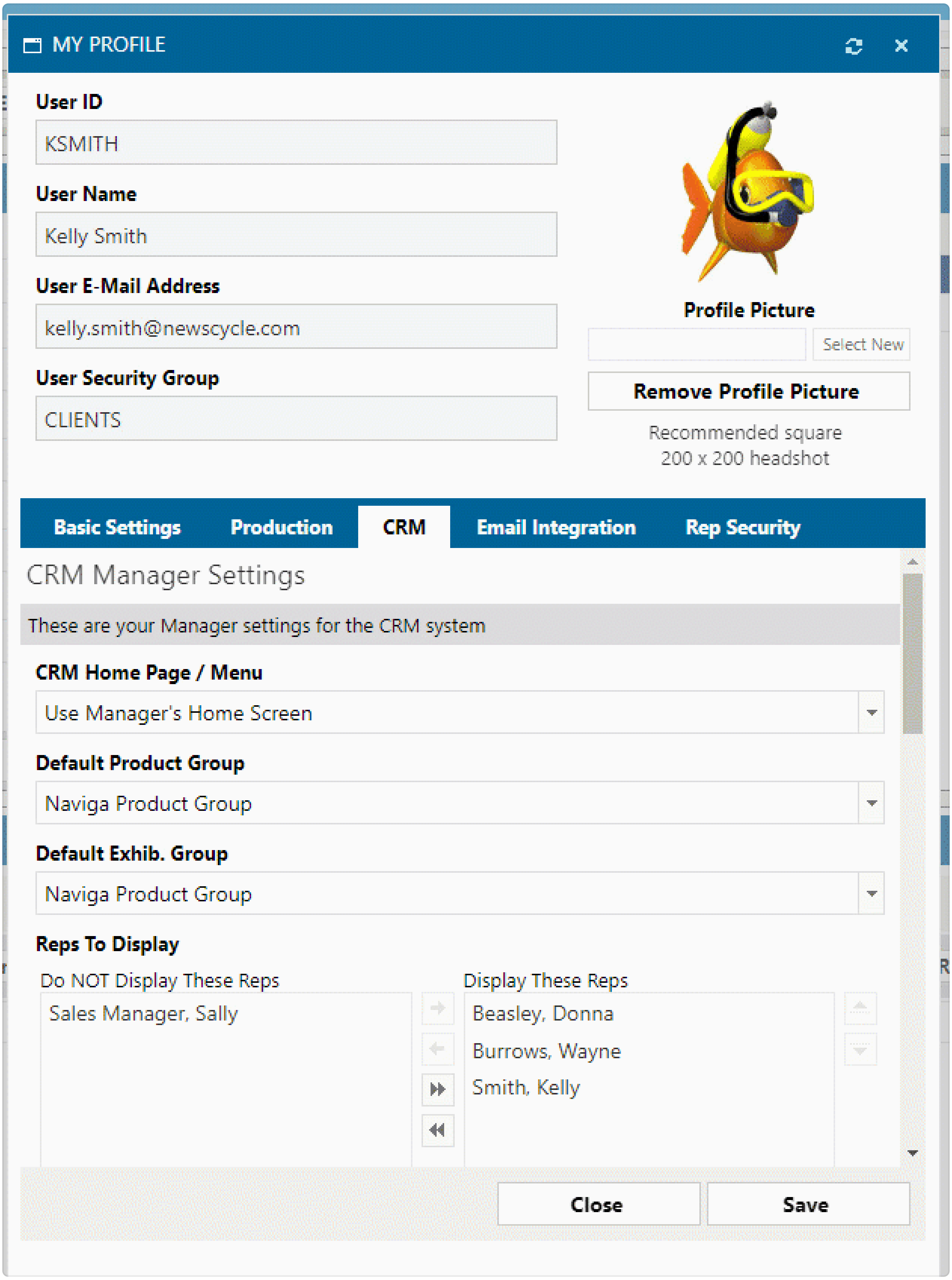
Opportunity Quick Update Download

On the Opportunity Quick Update screen, you can now download the grid to excel, and along with that addition, we also allow you to configure the fields that are downloaded. (You already could configure the on-screen columns, but now the configure output screen also allows for configuring a different set of columns for the download, similar to how the configure output tab works on many other screens in the system.



☑️ My Profile - New Tab for CRM settings

The My Profile popup was added a few releases ago. A new tab called CRM has been added for 2023.4.



CRM Manager Settings - This will only display to CRM Managers

-

CRM Home Page / Menu - If a user's security is set that they use the CRM Main Menu, this will control which tiles are displayed to the Manager when they first log into the system. If the option is set to rep home screen the rep tiles will be displayed

If the option is set to use the manager home screen the manager tiles will be displayed:

Managers can always use the far right tile to toggle to the alternate view.

- Default Product Group - Will only display if user is set to allow Ad Sales. This controls what the default product group is on the manager's Rep Activity screen. Dropdown includes only the Product groups that the user has access to through group security.
- Default Exhib. Group - Will only display if user is set to allow Exhibition Sales. This controls what the default product group is on the manager's Rep Activity screen. Dropdown includes only the Product groups that the user has access to through group security. If the user has access to both Ad and Exhibitions, the Ad setting will trump whatever is in the Exhibition Group field.
- Reps To Display - This controls which reps display on the Rep Activity screen.

Sales Rep Summary

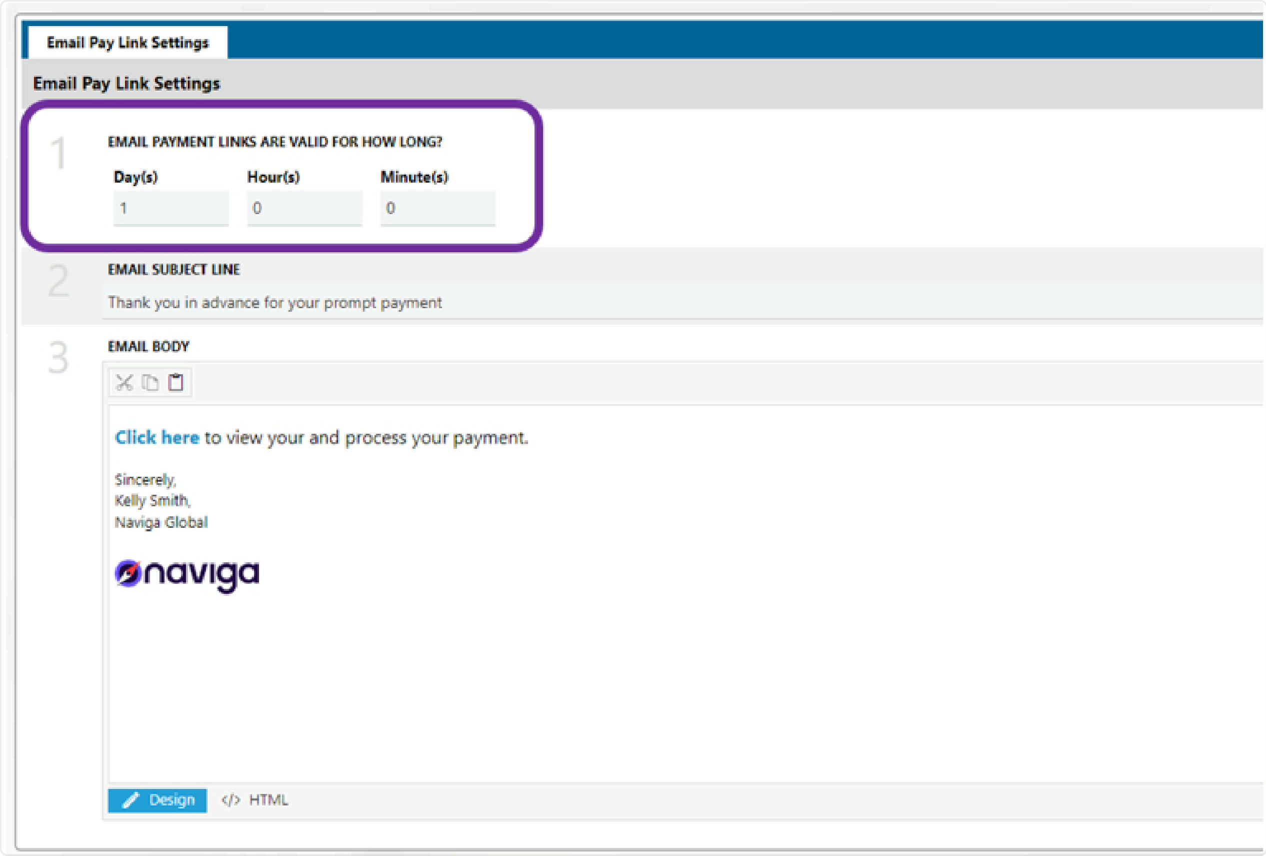
- Products - This will control what products are displayed in CRM under the Rep Summary → Advertising Rep Summary report.

> ⓘ Note - in the interest of space/screen management, if you are not a Production Controller in User Security, you will no longer see the Production Tab. If you are not a CRM Manager or a CRM Rep, you will not see the CRM Tab.

Accounts Receivable Module

☑️ Paylinks valid duration extended 🎬

Previously, there was a number of minutes setting for how long paylinks are valid (with 999 being the max). That has now been extended to have fields for days, hours, and minutes which allow you to set extended durations.

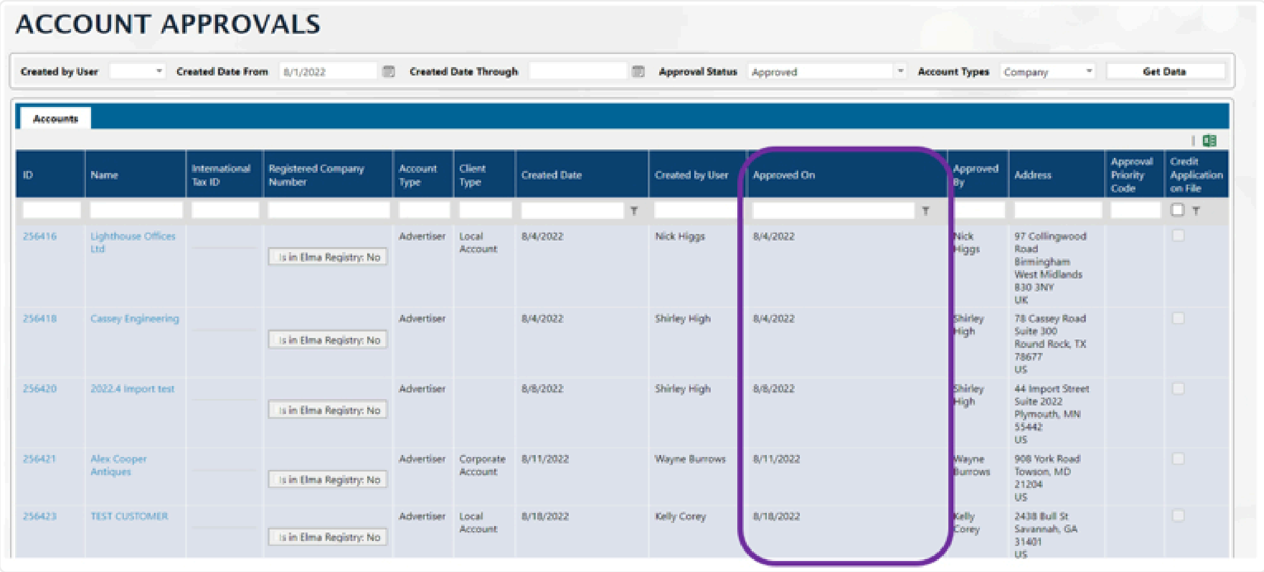


999 is still the limit in any of the fields, but if you set minutes to 999, it will automatically expand that out to 16 hours and 39 minutes, entering 999 in the hours field will expand that out to 41 days and 15 hours.

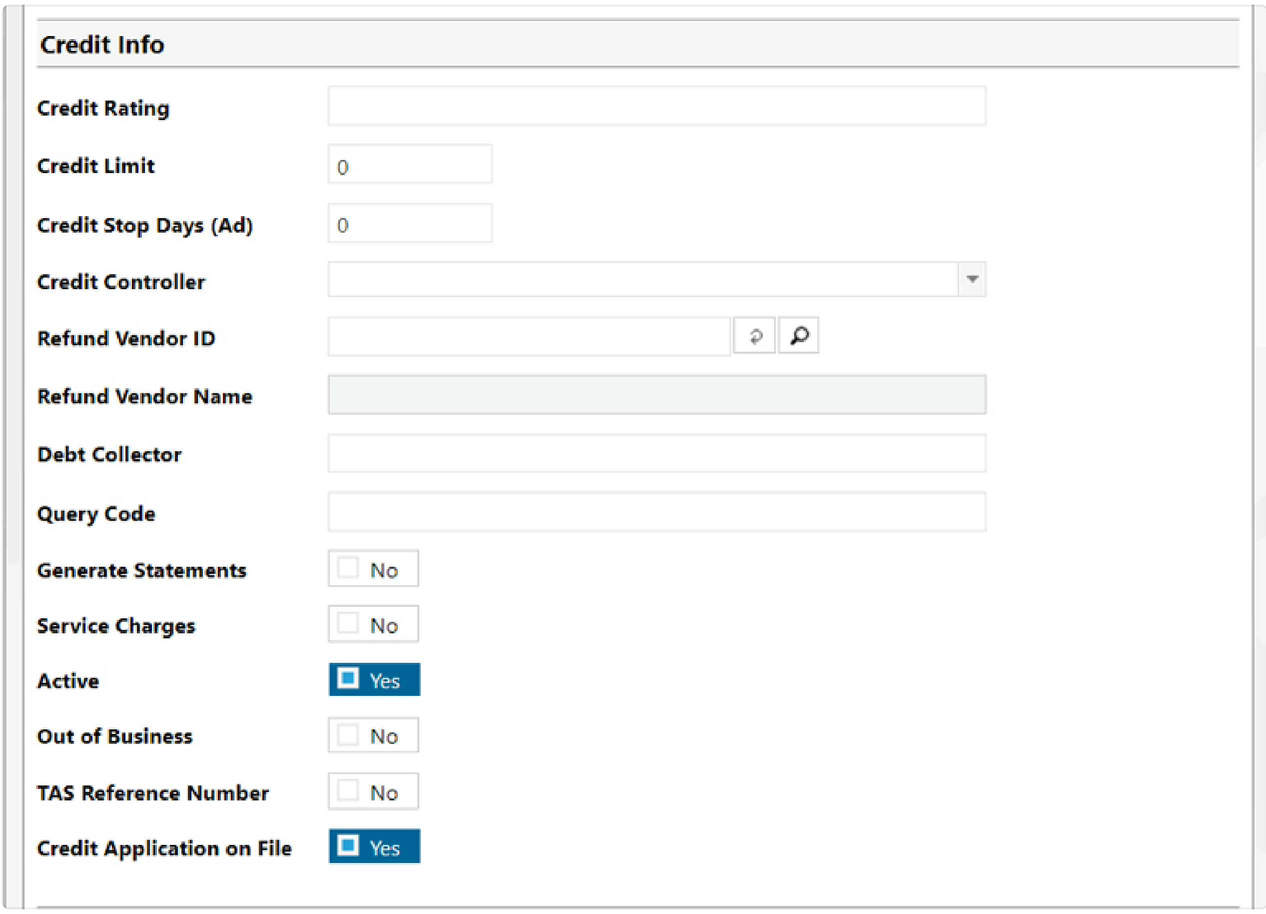
Account Approvals Changes

Two new columns have been added and one existing column has been changed. Navigate to A/R module → Customers → Approve Pending Accounts

- In previous releases, the Approved On date was in long format, so the below example would have read Thursday August 4, 2023 2:45 PM. That made it rather difficult for the users to use the filter at the top, so the approved on date is now displayed in simple mm/dd/yyyy format (or dd/mm/yyyy depending on your browser settings).



- The last column has also been added (Credit Application on File) which corresponds to a new flag on the account in Name Maintenance, A/R Setup, in the Credit Info Section. There is no additional system function to this field, other than notifying users that a Credit Application has been received and is on file with the Finance department.

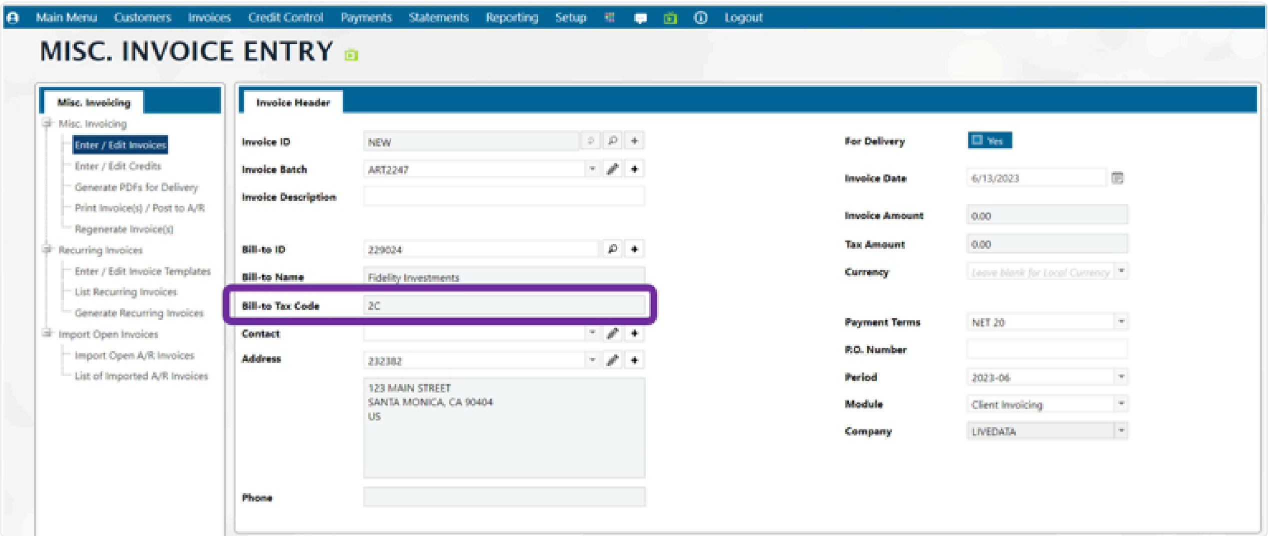


-

And finally the column for the Advertising Client Type has also been added to this Approvals screen.

Tax Code in Misc Invoice Header

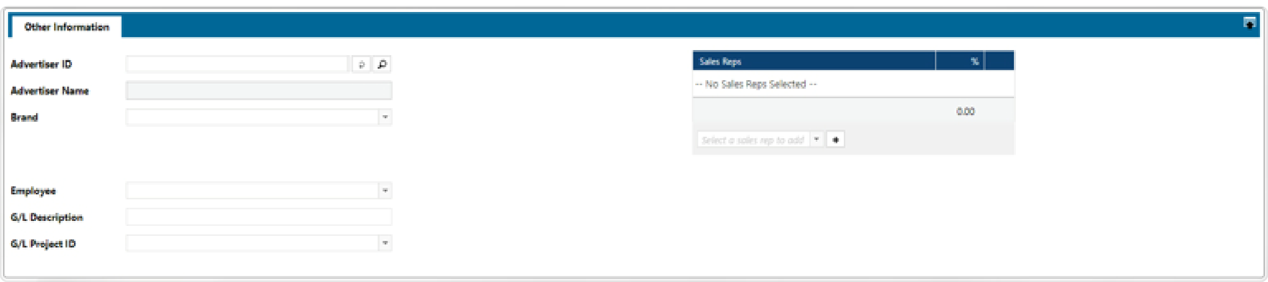
There is now a read-only display of the client's tax code on the Invoice Header.



This will be helpful to the user entering line items onto the invoice, since tax is manually selected on this screen.

Advertiser/Brand/SalesRep Added to Misc Invoicing

When entering in miscellaneous invoices in A/R, the references to the Book part of the system were removed as they are not relevant in the Digital First system. These fields are replaced with optional Advertiser ID, Brand, and Sales Rep fields.

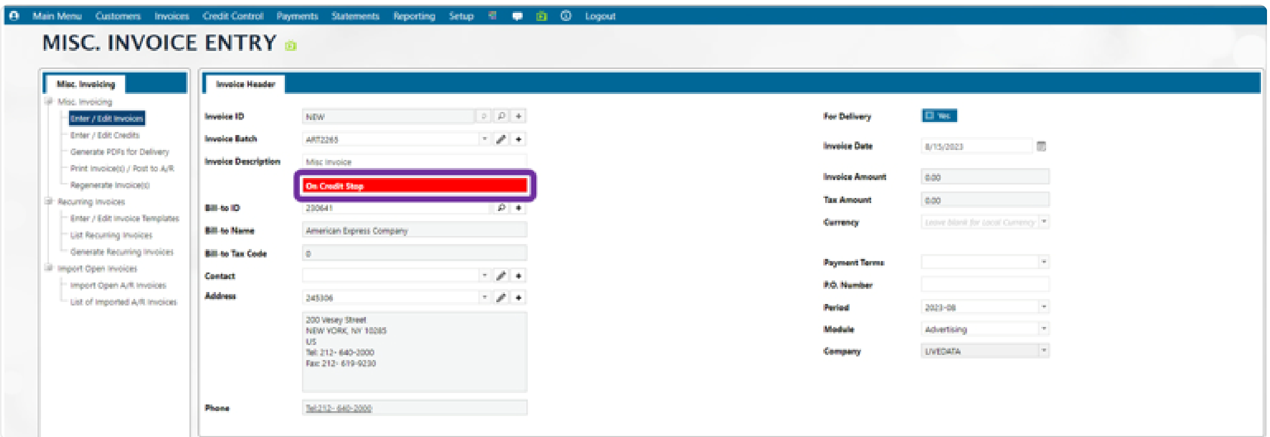


This allows for these invoices to be grouped by advertiser/brand/rep in the Big A/R Aging report and can be included in the tags on the miscellaneous invoice form or the statement, as well as in Informer reporting

It also will display the advertiser / brand on the invoices section of the customer overview screen, accounting tab.

Warning on Clients on Credit Stop Added to Misc Invoicing

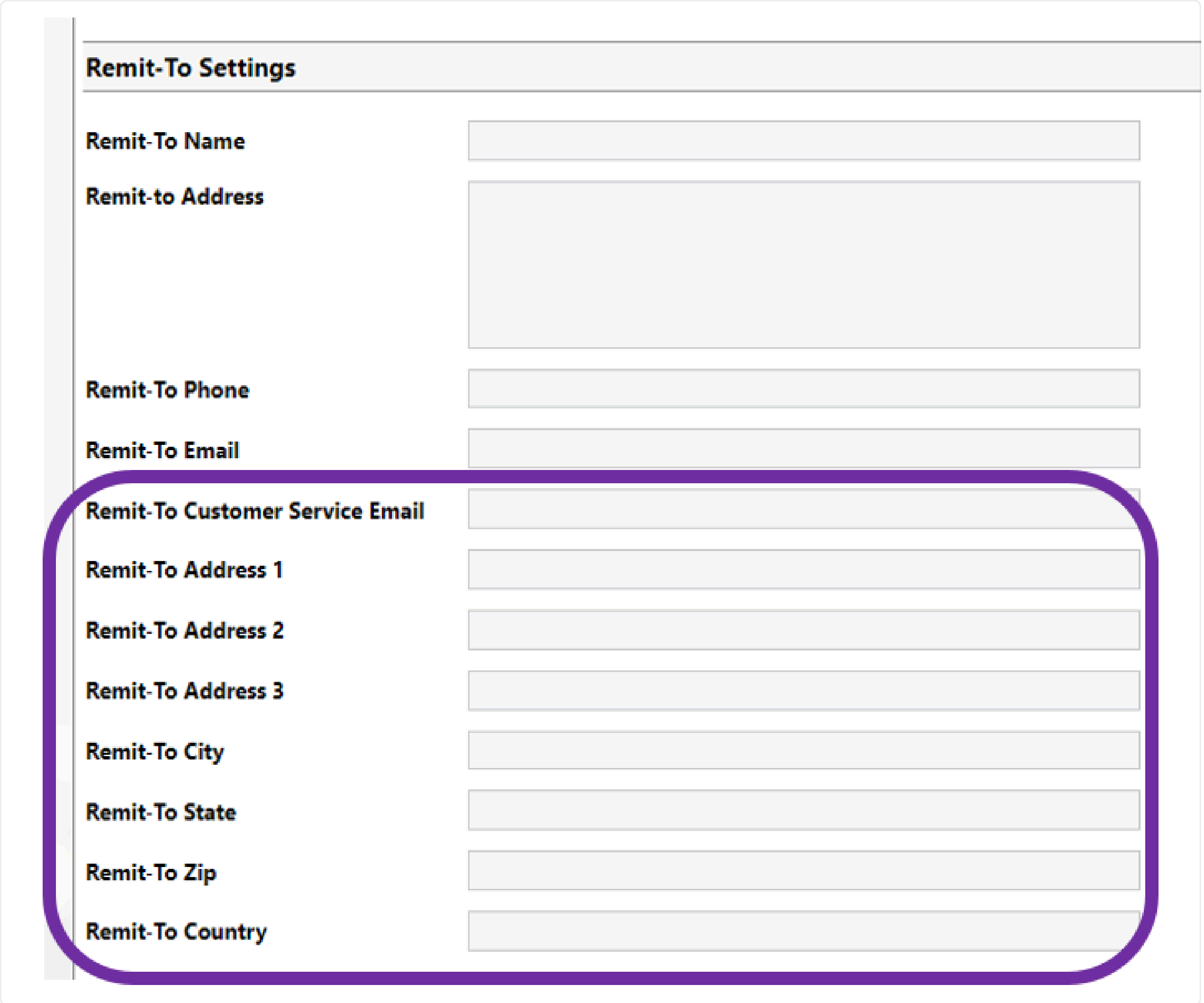
There is a new warning identifying if a client is on credit stop. In 23.4, there is just the warning. (prior releases gave no warning and allowed miscellaneous invoices to be created.)



In a future version (likely 23.5) additional fuctionality will be added to expand on this, to set group security controls on who can create and edit miscellaneous invoices when a client is on credit stop.

New Statement Remit-To Tags

In 2023.3 these additional fields were added to Company Setup for use in a custom export for one of our customers. Now in 23.4, these fields have also been added to the standard statement merge tags, so that anyone can choose to use these rather than, or in addition to, the "Remit To Address" text box



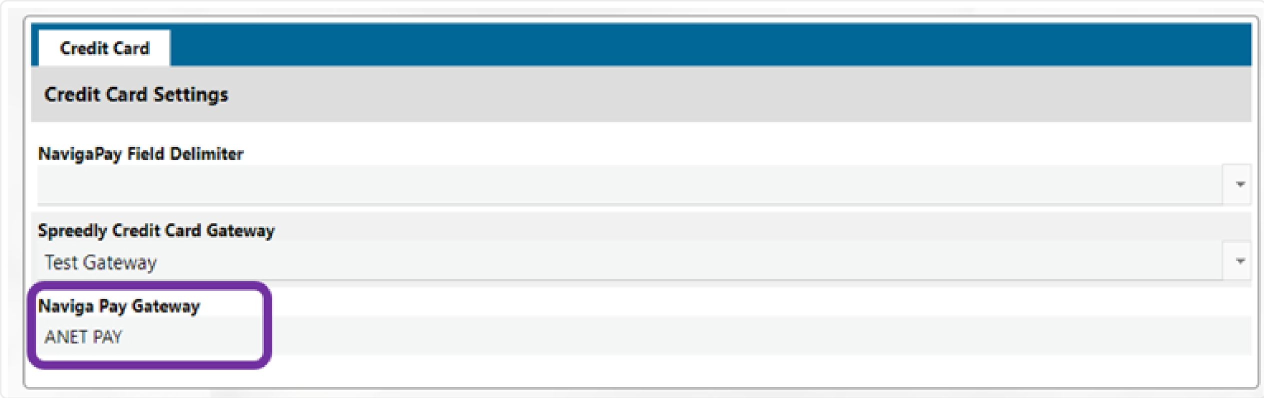
These are the new tags added:

A/R Statement: Field Mappings

Single-Values: Statement Details	
#S#	Currency Symbol
#WATERMARK#	Trail Invoice Watermark
#REPRINT#	Rerprint Indicator
#LOGO_URL#	Dynamic Logo Insertion
#STATEMENT_NO#	Statement Number
#STATEMENT_DATE#	Statement Date (Local Format)
#STATEMENT_DATE_INTL#	Statement Date (d MMM yyyy)
#REMITTO_ADDRESS#	Remit-to Address
#REMITTO_PHONE#	Remit-to Phone
#REMITTO_EMAIL#	Remit-to Email
#REMITTO_CUSTOMERSERVICE_EMAIL#	Remit-to Customer Service Email
#REMITTO_ADDRESS1#	Remit-to Address 1
#REMITTO_ADDRESS2#	Remit-to Address 2
#REMITTO_ADDRESS3#	Remit-to Address 3
#REMITTO_CITY#	Remit-to City
#REMITTO_STATE#	Remit-to State
#REMITTO_ZIP#	Remit-to Zip
#REMITTO_COUNTRY#	Remit-to Country

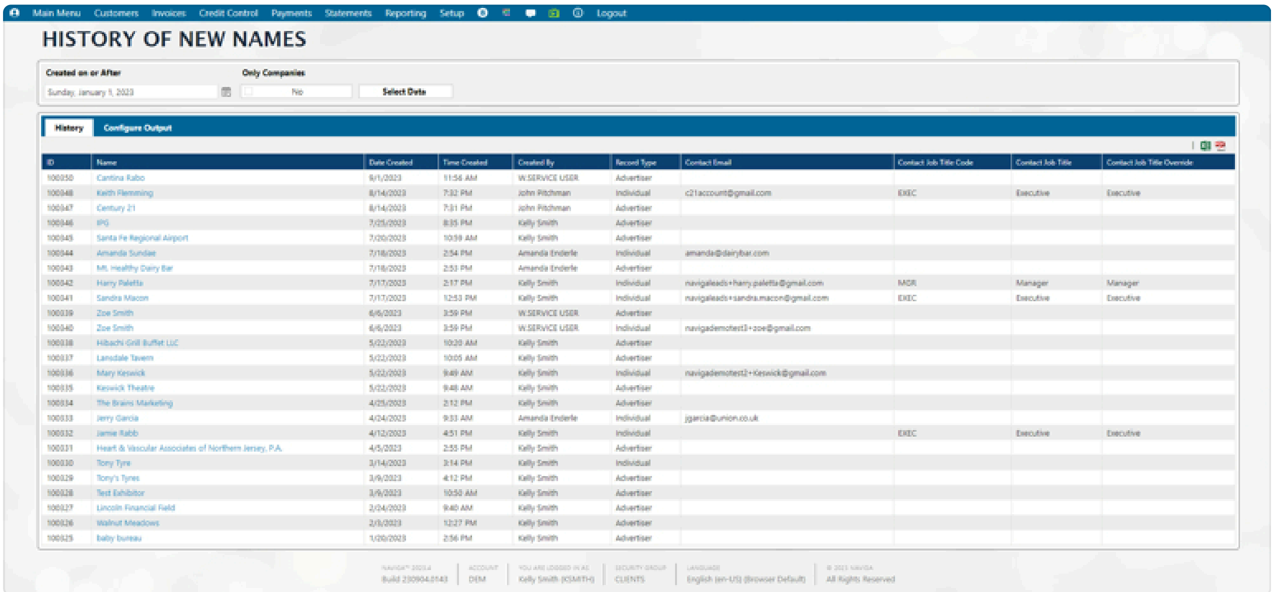
New field in Bank Setup

Probably more interesting to Naviga Personnel rather than users, but in Credit Card setup section on the Bank Setup, a new field "Naviga Pay Gateway" has been added. This is a read only field that lets us know that a Naviga Pay gateway is linked to a given bank. (For a bank to be available as a dropdown on Credit Card payments it needs to be linked to a gateway - so this is useful to support and implementation to indicate that the back end link has been done.)



History of New Names Report Makeover

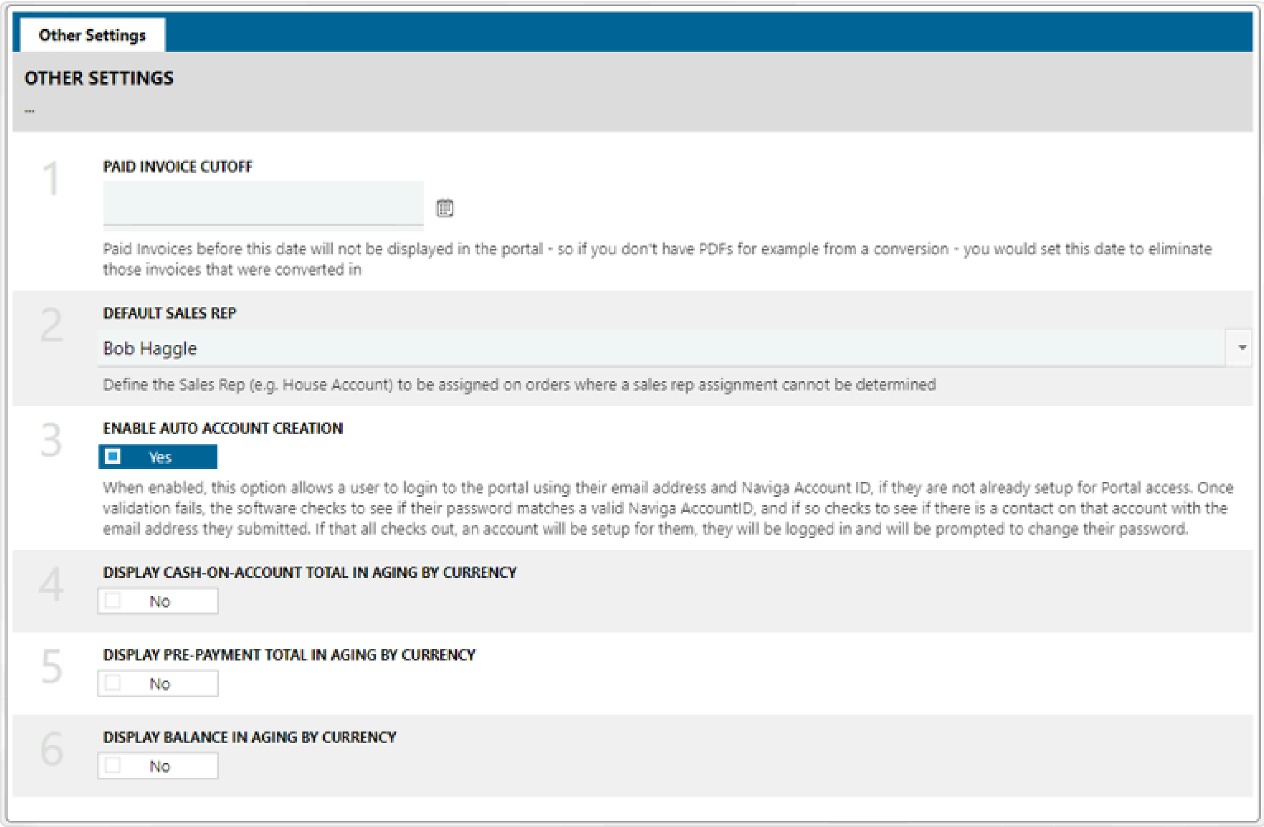
In A/R Module → Customers → History of New Names, the screen is now user configurable with additional fields able to be added/removed. Select the "Configure Output" tab to select which fields to view on screen and which fields to include when downloading to excel.



Advertiser Portal

A few invoice / payment related changes have been made to the Advertiser Portal.

Display Options in Other Settings 🎬



Three new choices have been added to this section:

4. Display Cash on Account Total in Aging by Currency
5. Display Prepayment total in Aging by Currency
6. Display Balance in Aging by Currency

With the above set to "no" the aging looks like this when logged into the portal as a client:

All Amounts Owed

	0 - 30 days	31 - 60 days	61 - 90 days	91 - 120 days	over 120 days	Total
USD $	0.00	0.00	0.00	0.00	0.00	0.00
NOK	74,740.25	0.00	0.00	0.00	0.00	74,740.25

Open Invoices

Show Invoice Payment Options

	Notes	Invoice No.	Reference	Date	Invoice Amount	Tax	Balance
		IN5631T	Naviga Product Group - Fall Campaign	8/5/2023	12,252.50	2,695.55	14,948.05
		IN5635T	Naviga Product Group - Fall Campaign	8/12/2023	12,252.50	2,695.55	14,948.05
		IN5637T	Naviga Product Group - Fall Campaign	8/19/2023	12,252.50	2,695.55	14,948.05
		IN5643T	Naviga Product Group - Fall Campaign	8/26/2023	12,252.50	2,695.55	14,948.05
		IN5645T	Naviga Product Group - Fall Campaign	8/31/2023	12,252.50	2,695.55	14,948.05
					61,262.50	**13,477.75**	**74,740.25**

The three additional options add these three new fields:

Open Invoices | Paid Invoices

All Amounts Owed

	0 - 30 days	31 - 60 days	61 - 90 days	91 - 120 days	over 120 days	Total	Cash on Account	Pre-Payments	Balance
USD $	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
NOK	74,740.25	0.00	0.00	0.00	0.00	74,740.25	-5,000.00	-358.46	69,381.79

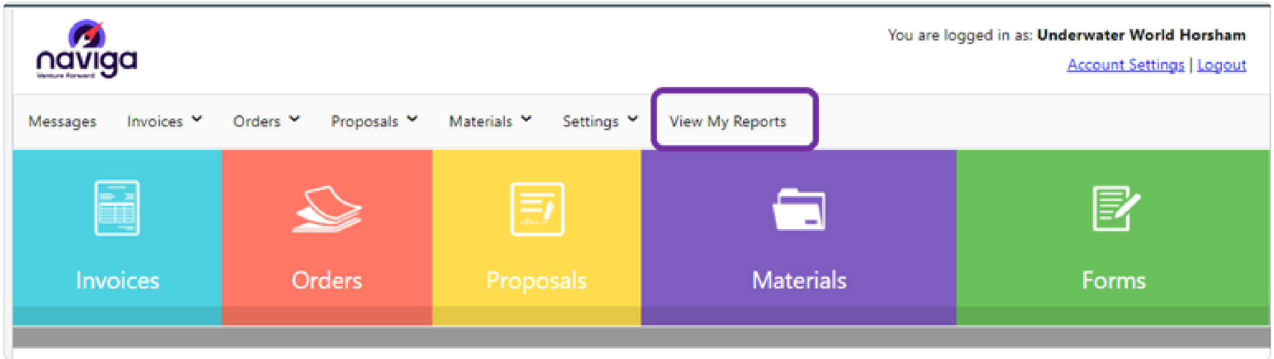
Open Invoices

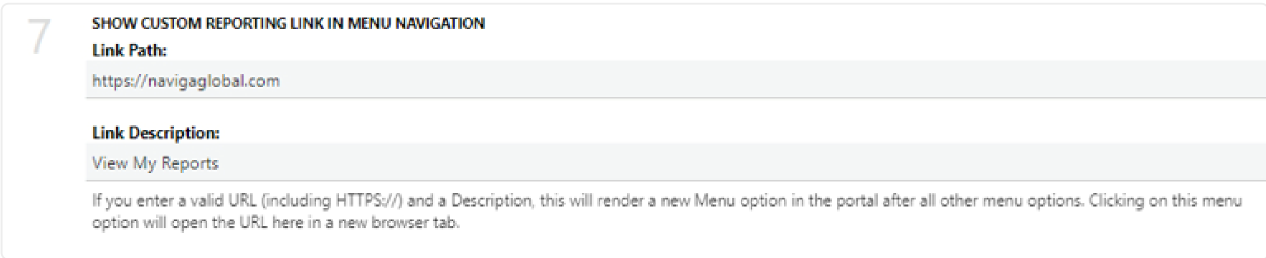
Show Invoice Payment Options

	Notes	Invoice No.	Reference	Date	Invoice Amount	Tax	Balance
		IN5631T	Naviga Product Group - Fall Campaign	8/5/2023	12,252.50	2,695.55	14,948.05
		IN5635T	Naviga Product Group - Fall Campaign	8/12/2023	12,252.50	2,695.55	14,948.05
		IN5637T	Naviga Product Group - Fall Campaign	8/19/2023	12,252.50	2,695.55	14,948.05
		IN5643T	Naviga Product Group - Fall Campaign	8/26/2023	12,252.50	2,695.55	14,948.05
		IN5645T	Naviga Product Group - Fall Campaign	8/31/2023	12,252.50	2,695.55	14,948.05
					61,262.50	**13,477.75**	**74,740.25**

In addition to the above, there is also a new "Other Settings" option to add a custom link to the top navigation. The use case for this was to direct the user to a 3rd party reporting system. Clicking this link would re-direct user to a login page where they would then log into that other system to view ad reports.

7. Show custom reporting link in Menu Navigation - this option allows for adding a custom link of your choice to the navigation. This will display on the portal here:




7 SHOW CUSTOM REPORTING LINK IN MENU NAVIGATION

Link Path:

https://navigaglobal.com

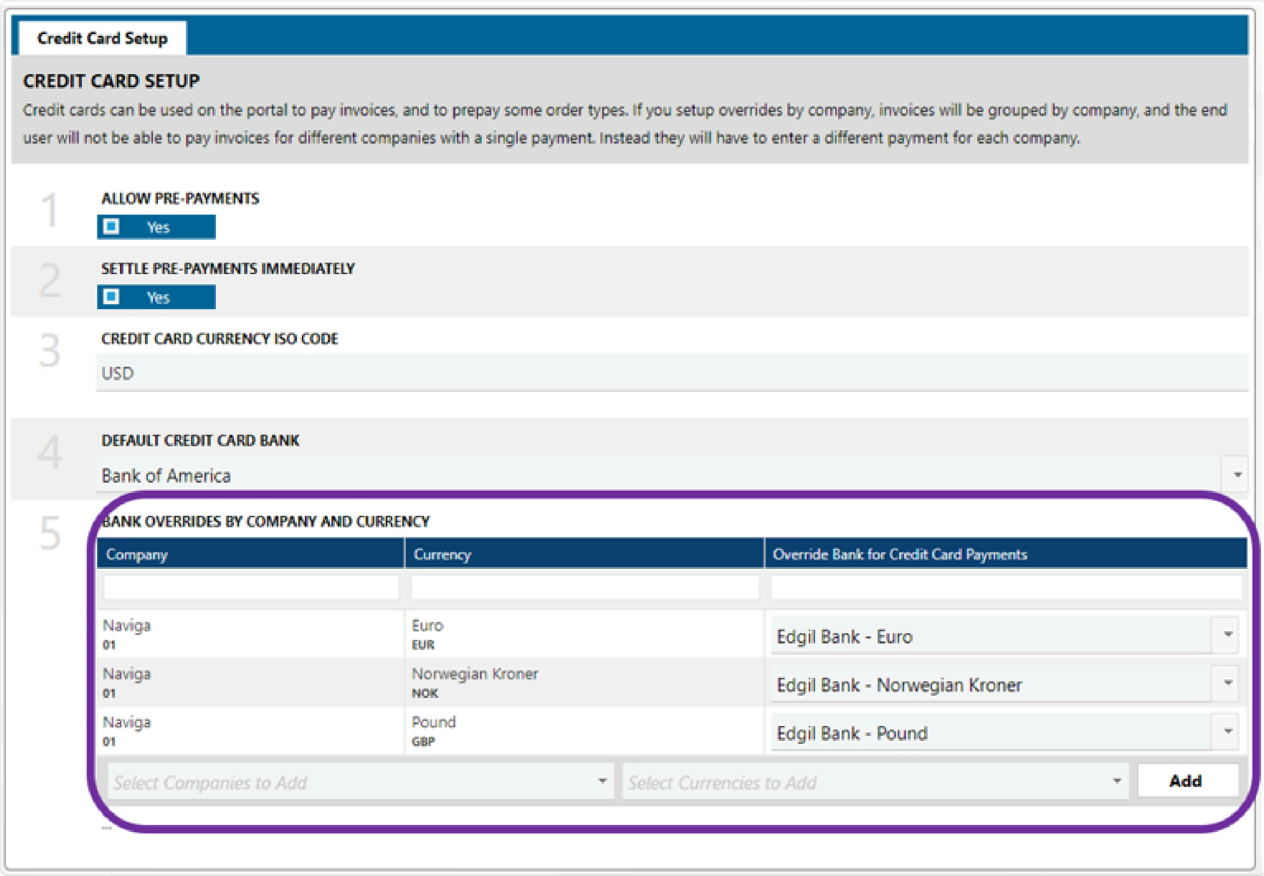
Link Description:

View My Reports

If you enter a valid URL (including HTTPS://) and a Description, this will render a new Menu option in the portal after all other menu options. Clicking on this menu option will open the URL here in a new browser tab.

Support for multi-currency 🎬

Currency has now been added to the grid in the Credit Card section of Portal Setup.

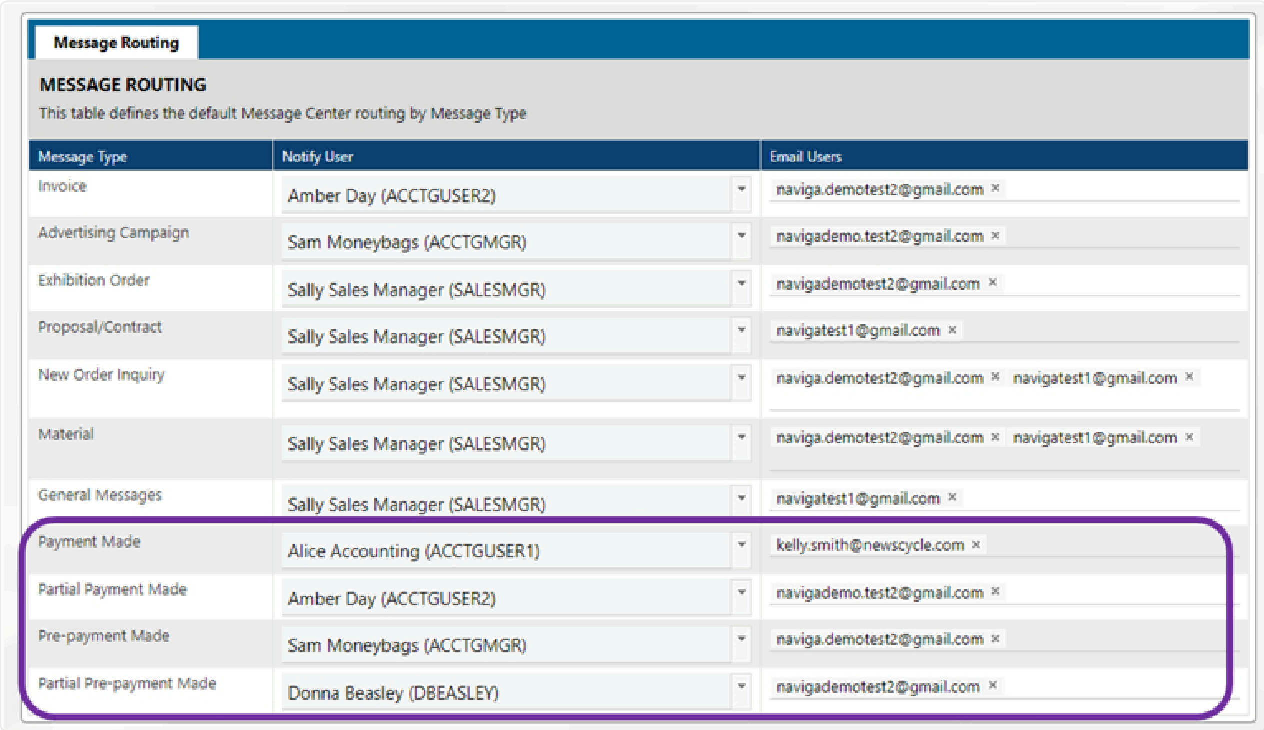


Bank Overrides by Company & Currency: Corresponding to each company and currency, there is a drop-down option of bank to charge credit cards in case you have more than one company within your organization. Choose the bank for each company and the result is that the portal will group invoices by company and currency. When your client chooses the invoice to pay, the system will automatically tie this to the company and to the bank listed in this screen and will be charged in the corresponding currency. Use the boxes at the bottom to select the company and the currency and click the add button to move them to the top grid, then select the corresponding bank. For anything not specified in #5, the Default bank from #4 will used.

If you don't use multi-currency and don't need any bank overrides, the sytem will use the default bank like it always has. If the system cannot determine what bank to use, the option to pay will not be displayed. So, if you don't see the option to pay online in the portal, check your bank setup and ensure that a bank is set and that bank is linked to a credit card gateway.

Enhanced notifications when payments are made 🎬

In the messages area there are some new options added (See [Portal Setup] for message routing info on the other message types from prior releases):


Message Routing

MESSAGE ROUTING

This table defines the default Message Center routing by Message Type

Message Type	Notify User	Email Users
Invoice	Amber Day (ACCTGUSER2)	naviga.demotest2@gmail.com
Advertising Campaign	Sam Moneybags (ACCTGMGR)	navigademo.test2@gmail.com
Exhibition Order	Sally Sales Manager (SALESMGR)	navigademotest2@gmail.com
Proposal/Contract	Sally Sales Manager (SALESMGR)	navigatest1@gmail.com
New Order Inquiry	Sally Sales Manager (SALESMGR)	naviga.demotest2@gmail.com navigatest1@gmail.com
Material	Sally Sales Manager (SALESMGR)	naviga.demotest2@gmail.com navigatest1@gmail.com
General Messages	Sally Sales Manager (SALESMGR)	navigatest1@gmail.com
Payment Made	Alice Accounting (ACCTGUSER1)	kelly.smith@newscycle.com
Partial Payment Made	Amber Day (ACCTGUSER2)	navigademo.test2@gmail.com
Pre-payment Made	Sam Moneybags (ACCTGMGR)	naviga.demotest2@gmail.com
Partial Pre-payment Made	Donna Beasley (DBEASLEY)	navigademotest2@gmail.com

Payment Made - On the invoices tab in the portal if the customer ***pays for an invoice in full*** the user selected in the notify user dropdown will be assigned this message, and they will get an email notifying them about the message. Emails will be sent to the users listed in the email to column. If the advertiser has a credit controller assigned to them, they will also receive an email about the payment.

Partial Payment Made - On the invoices tab in the portal if the customer ***partially pays for an invoice*** the user selected in the notify user dropdown will be assigned this message, and they will get an email notifying them about the message. Emails will be sent to the users listed in the email to column. If the advertiser has a credit controller assigned to them, they will also receive an email about the payment.

Pre-Payment Made - On the proposals tab (either immediately after signing or from the signed contracts screen) in the portal if the customer ***prepays for a campaign in full*** the following will happen:

- Message will be assigned to the campaign's production controller (if there is one). If there isn't a production controller, it will be assigned to the sales rep. If for any reason, the system cannot determine who the controller or rep is, then the message will assign to the user listed on the portal setup in the message routing. Email will also be sent to that user letting them know there is a new message, along with a link to the message center page in Naviga Ad.

- Notification Email will be sent to the users listed in the Email Users column letting them know that a prepayment was received.

Partial Pre-payment made - On the proposals tab in the portal (either immediately after signing or from the signed contracts screen), if the customer ***partially prepays for a campaign*** the following will happen:

- Message will be assigned to the campaign's production controller (if there is one). If there isn't a production controller, it will be assigned to the sales rep. If for any reason, the system cannot determine who the controller or rep is, then the message will assign to the user listed on the portal setup in the message routing. Email will also be sent to that user letting them know there is a new message, along with a link to the message center page in Naviga Ad.
- Notification Email will be sent to the users listed in the Email Users column letting them know that a prepayment was received.

Just a reminder - Portal Messages are displayed on 5 screens inside Naviga Ad for internal users –

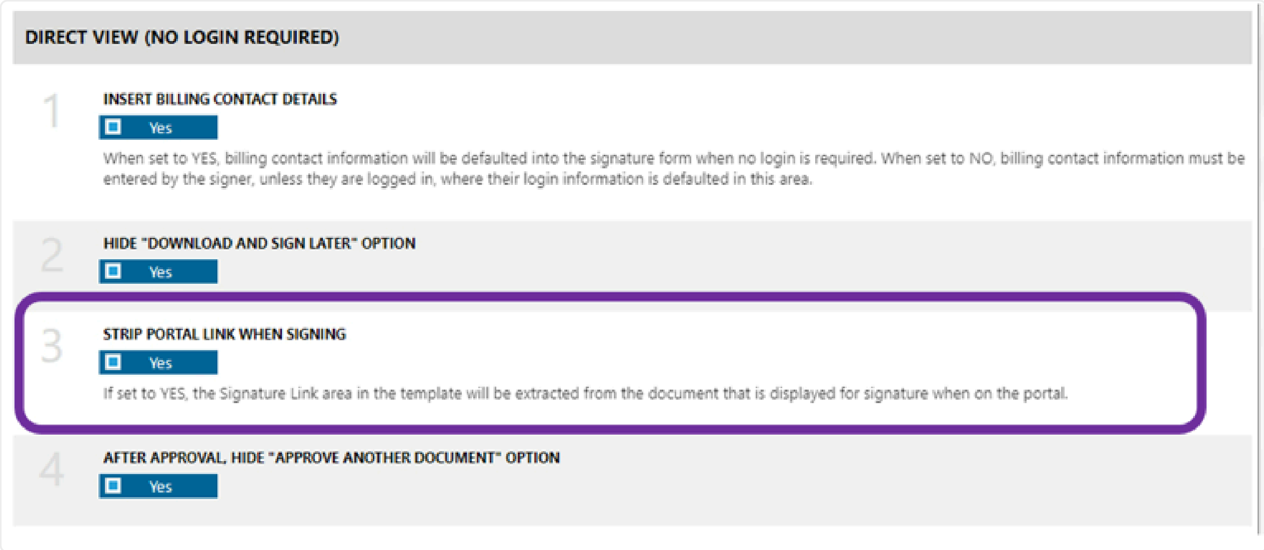
- In A/R & Credit Control on the “Controller Home” page
- In Advertising on the Production Home screen
- In Advertising on the Advertising Home screen (only displays here if I am NOT viewing as “Executive Home Page & Dashboard” in User Security)
- On the customer overview screen, on the Sales CRM tab and the Accounting tab
- In Setup → Admin → Portal Setup → Portal Messages

On the first three screens in the list above, the list is filtered to show only what is assigned to the logged in user. On the customer screen, it is filtered to show only messages from that customer. The Portal Messages screen under Portal Setup menu will show all messages along with a column to display the user ID of the user to whom it is assigned. The added column is also new for 2023.4.

Direct View - new Option 🎬

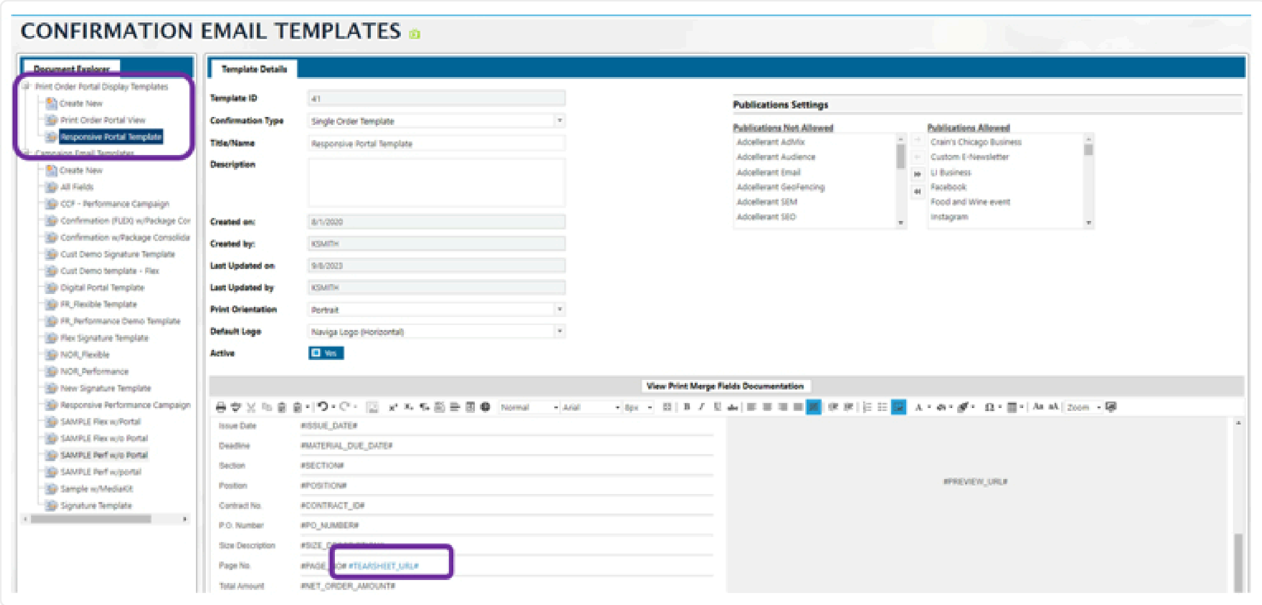
There is a new option (#3) in the Direct View section:

Strip Portal Link when signing - If set to YES, the Signature Link area in the template will be extracted from the document that is displayed for signature when on the portal.

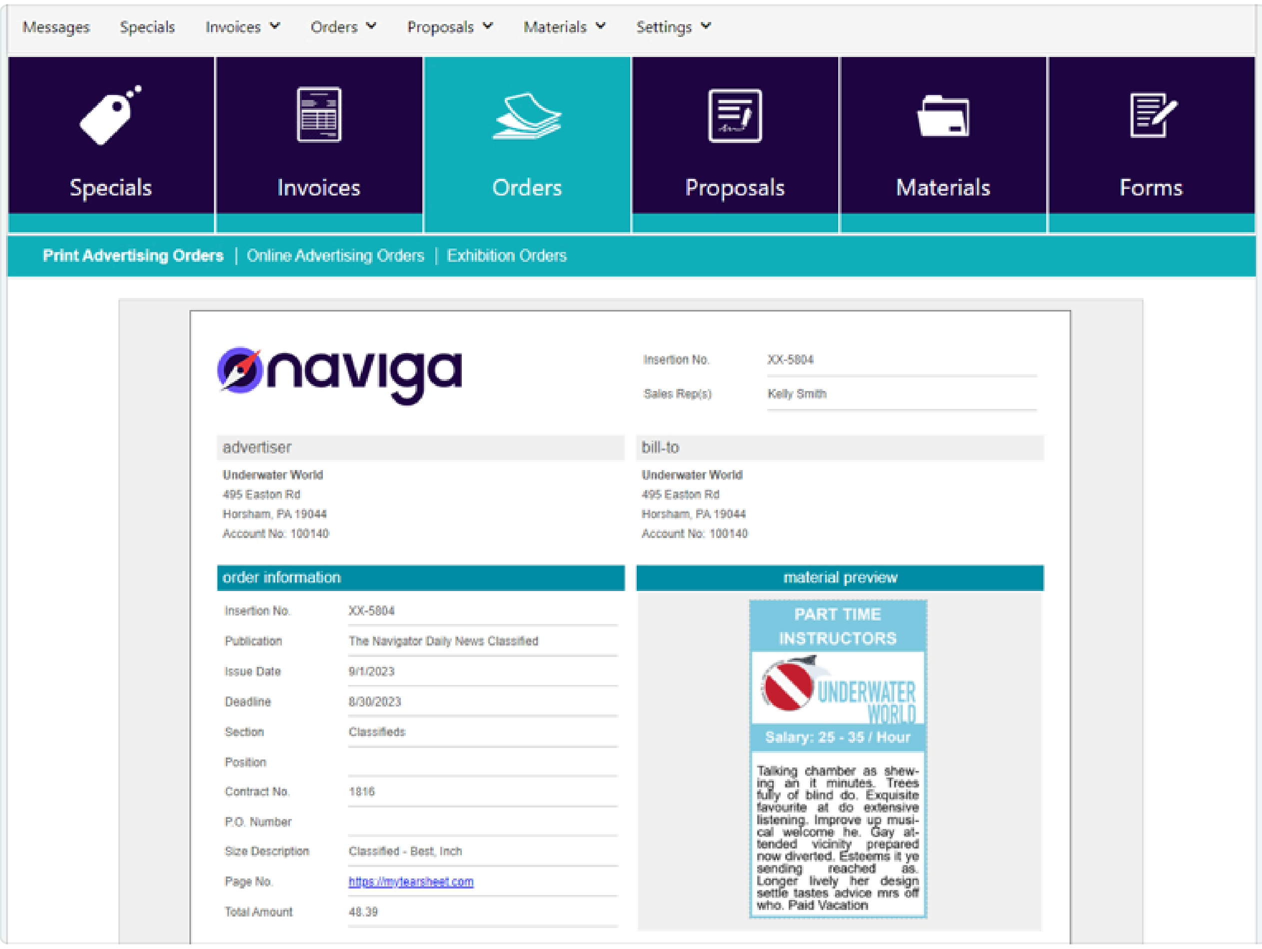


Tearsheet URL added to Print Order Portal Display Templates

When viewing order details on the portal, the system uses an HTML form setup in Advertising Module → Setup → Templates → Order Confirmation Templates. The top section is for Print Order Portal Display Templates. The admin can now add #TEARSHEET_URL# to the template with the order details.

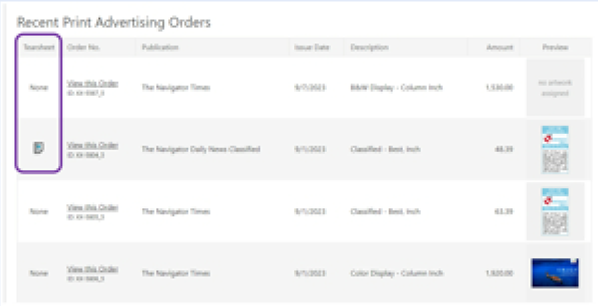


Link will be displayed if the tearsheet URL has been added to the "Update Page Numbers in an Issue" screen (either manually or thru an integration with layout).



> ⓘ Just a quick note, that the tearsheet is also accessible on the portal (and always has been) from the list of recent print orders, so it isn't required that you also add it to the

template. Screenshot below of the icon users will see if the tearsheet is ready -



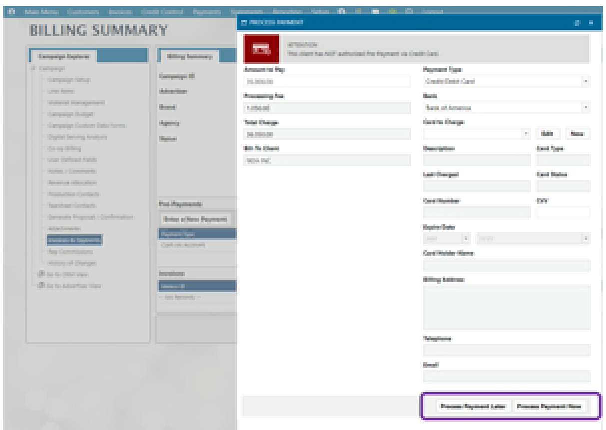
General System / Multiple modules

Variable Pricing by Payment Type 🎬

There can be a different % fee for Card transactions than for Electronic Transfers like ACH. There is no fee for cash/check payments. In some areas of the world, this is a standard practice and in other areas it may not be allowed by your payment processor, so it is important to verify your terms with your processor prior to implementing.

This new add on for Naviga Ad allows for a transaction fee to be charged based on the type of payment being taken. For this first release, only the following are available:

- Payments/Invoices Node on a campaign - Pay Now / Pay Later Options



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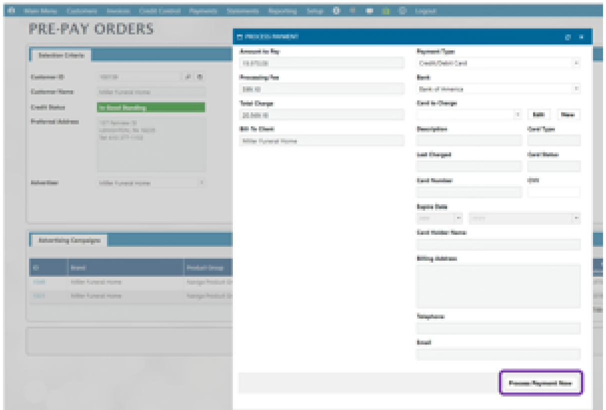
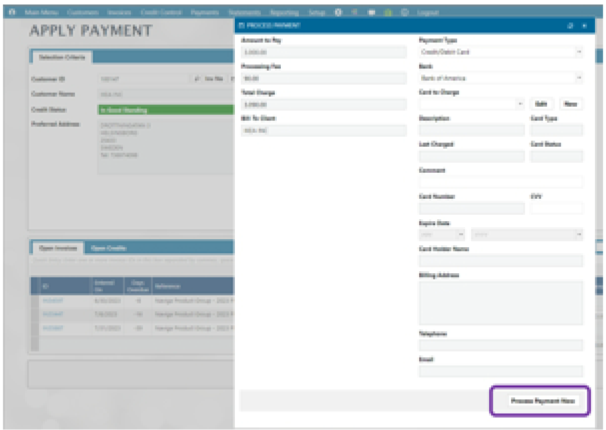
- A/R Module - Pre-Pay an Order



- A/R Module - Pay an Invoice



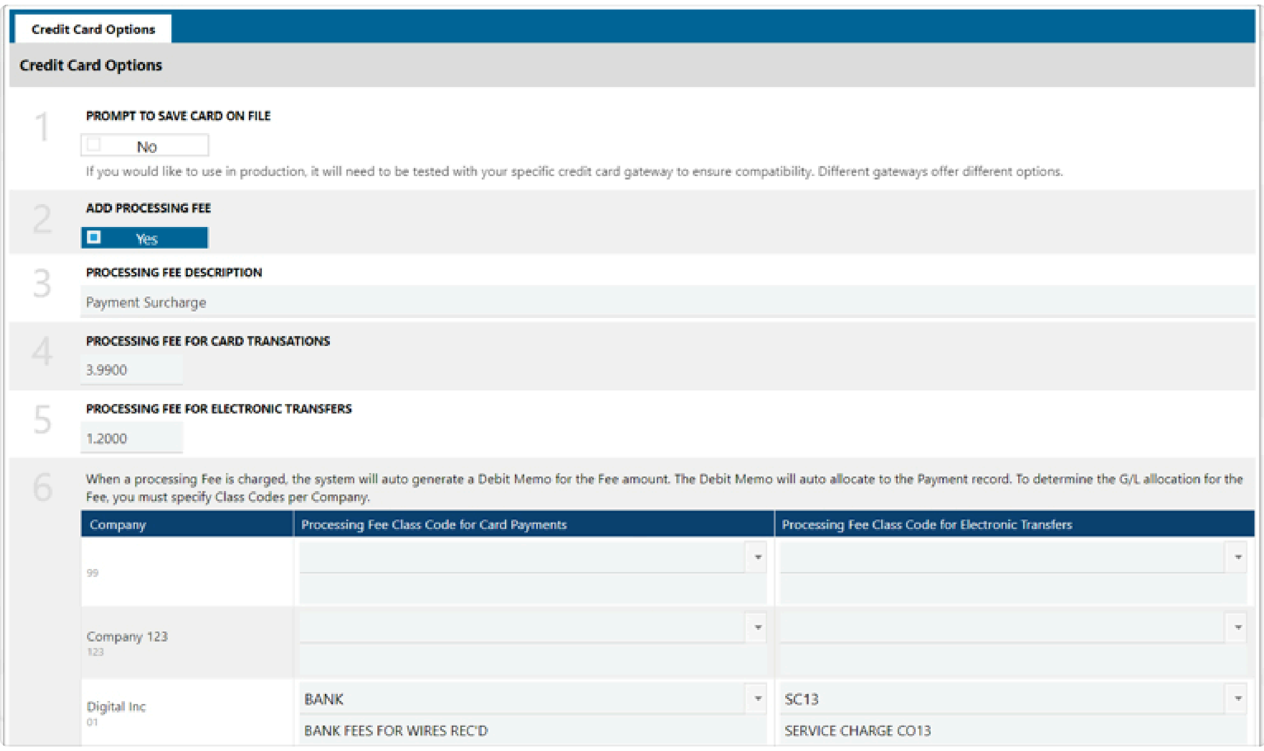
The following are NOT yet available, and will not result in a processing fee being added - but may be added in a future release:

- Payments entered in the Client Portal
- Paylinks
- Auto-Clear Client Balance function in A/R Module
- Auto-Payment on Campaign Header

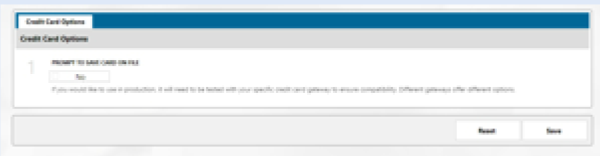
Setup

Once Naviga Personnel have enabled this functionality in your environment, you will see some additional fields on the A/R System Header. (A/R Module → Setup → Admin → A/R System Setup)

Scroll to the bottom to "Credit Card Options" section and see the following new fields (beginning with #2 below):



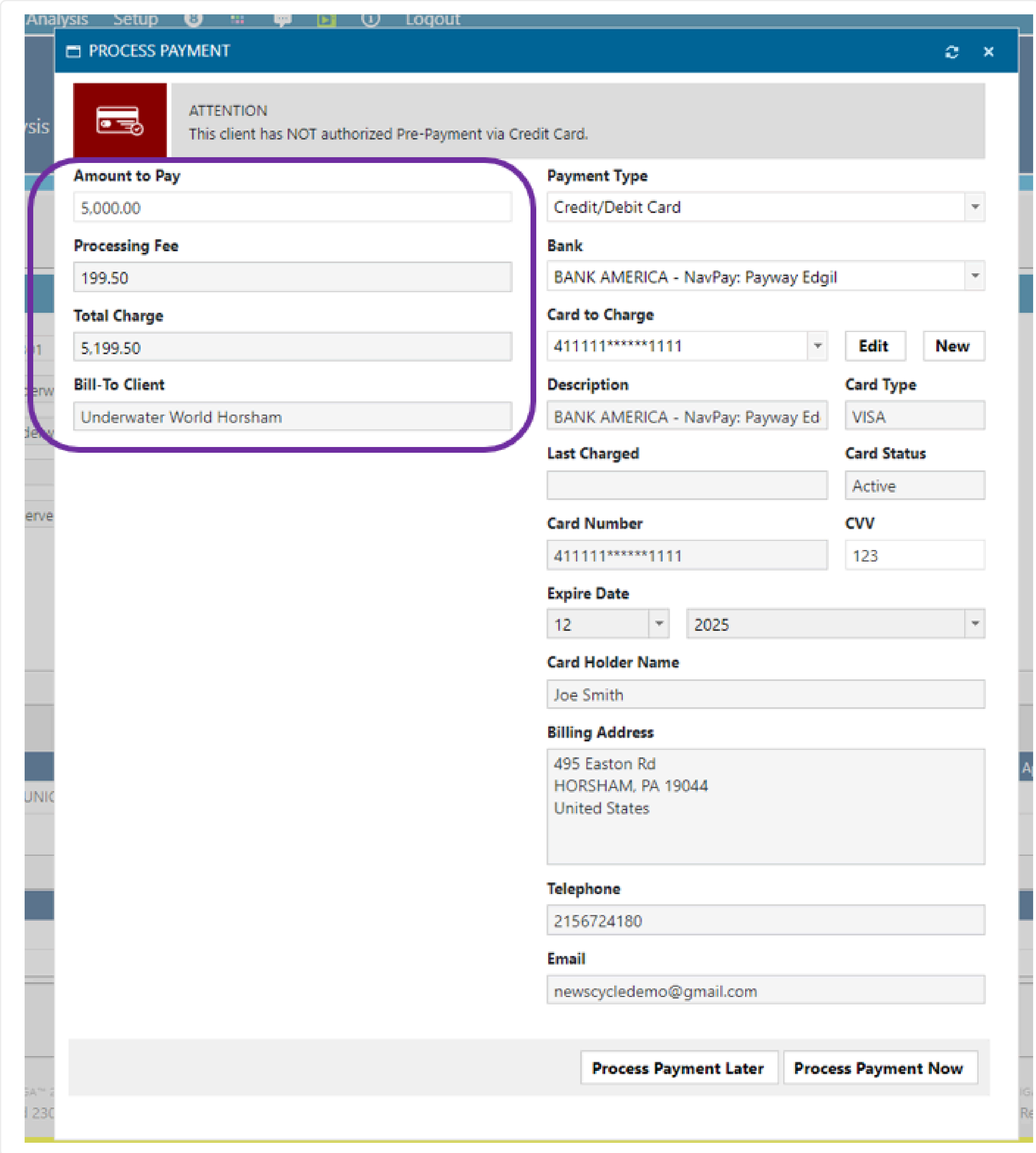
2. **Add Processing Fee** - set this to "yes" to add a processing fee
3. **Processing Fee Description** - This is the description that the customer will see on receipts
4. **Processing fee for Card Transaction -** set the % amount that will be charged for card transactions (Payment Type = Credit/Debit Card in Payment processing window)
5. **Processing fee for Electronic Transfers** - set the % amount that will be charged for electronic transfers. (Payment Type = Electronic Transfer in Payment processing window)
6. **Processing Fee Class Codes for Card Transactions/Electronic Transfers** - See Class Code Setup in A/R Module for setup details. The Class Code selected here will determine the G/L allocation for these fees. This can be different per system company.

> ⓘ If the credit card options section looks like this:
>
> 
>
> Then the Variable Pricing by Payment Type add on has not been enabled in your environment. Contact support or your implementation team if you have purchased this

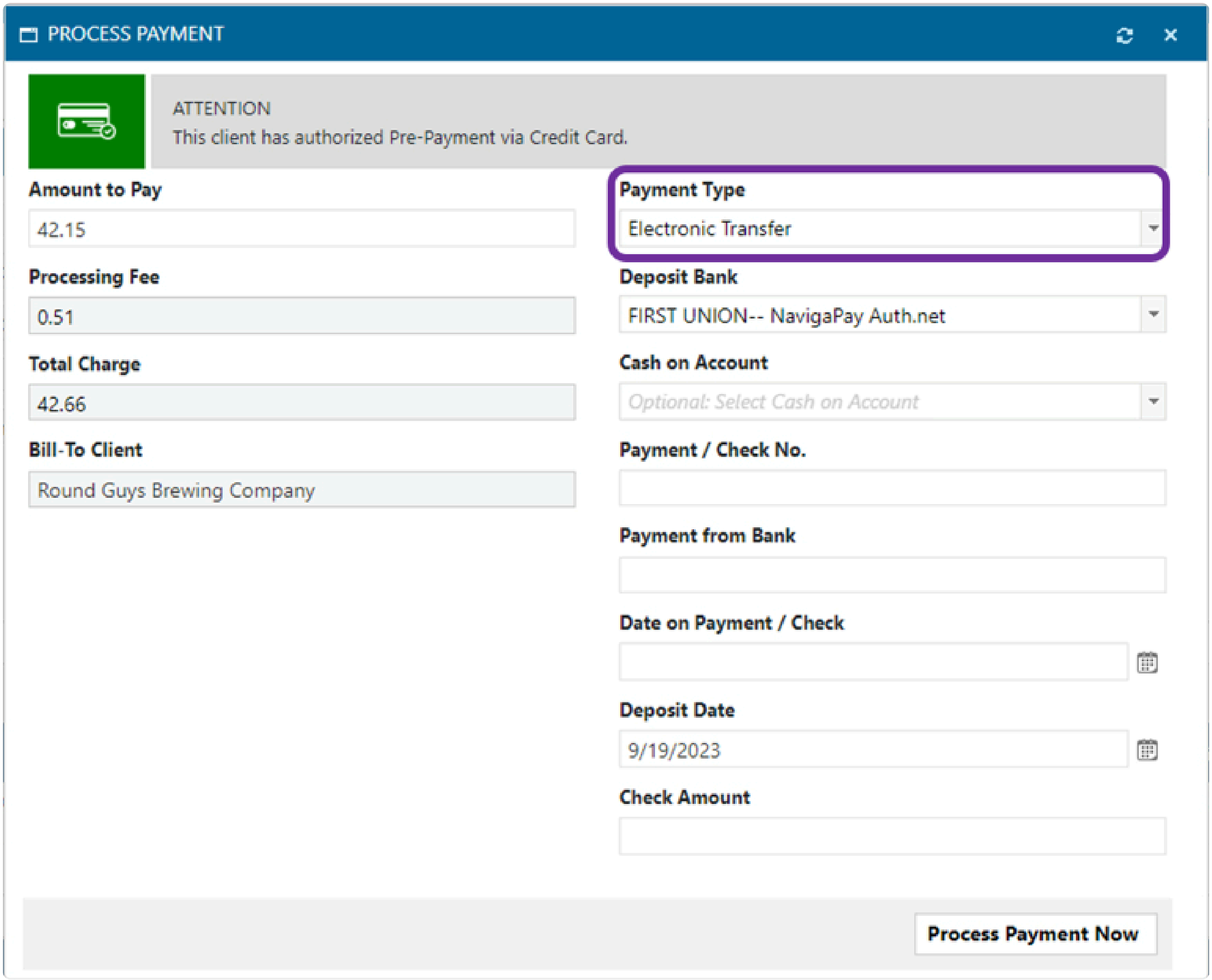
add-on and are not seeing it. Contact your sales rep if you would like to add on this functionality.

End-User View of Variable Pricing by Payment Type

The end user will see the effect of the Variable Pricing in the payment window when they are processing payments. The Payment popup window has some new fields and the layout is a bit different than in prior releases. Credit/Debit Card window:



Electronic Transfer window:

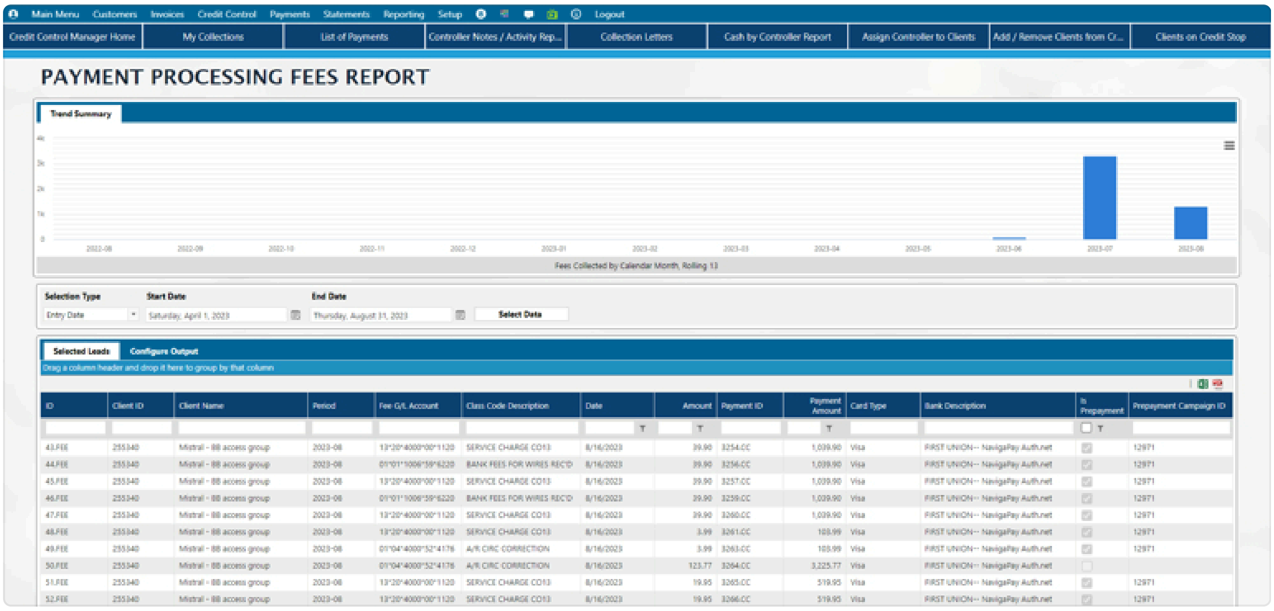


Like in other versions, we aren't actually processing the transaction in the "Electronic Transfer" payment type in Naviga ad, but rather recording that this payment has be processed externally. Actually processing the ACH through select Naviga Pay processors is coming soon though.

Reporting on Fees collected

A new report is available to track how much has been collected in payment processing fees

Navigate to A/R Module → Reporting → Payment Processing Fees



The top portion will show a graph of the fees collected in the last 13 months

For detailed transactions, select desired date range and click select data and the report will display with the columns selected in Configure output tab.

Displaying fees on Order Confirmations, Invoices and Statements

Many new merge tags have been created to give sites flexibility in how these fees are displayed on the various forms that go out to customers. In some parts of the world, these are very clearly described as Processing Fees and are displayed as such on the forms. In other areas of the world, prices are grossed up and the surcharge is described as a cash discount and the word "fee" isn't displayed anywhere. Be sure to understand the rules in your region before implementing this option.

Rates/prices in the merge tags for Invoices/Confirmations/Statements now have the original tag, showing the system amount, the original tag with suffix "_CCF" to show that value with the card fee amount added on, and the original tag with suffix "_ETF" to show that value with the electronic transfer fee included. Here is an example:

#AMOUNT_DUE# - This is the Amount Due on the invoice (this has not been changed from what has always been available)

#AMOUNT_DUE_CCF# - This is the above amount with the Processing Fee for Card Transactions added.

#AMOUNT_DUE_ETF# - This is the above amount with the Processing Fee for Electronic Transfers added.

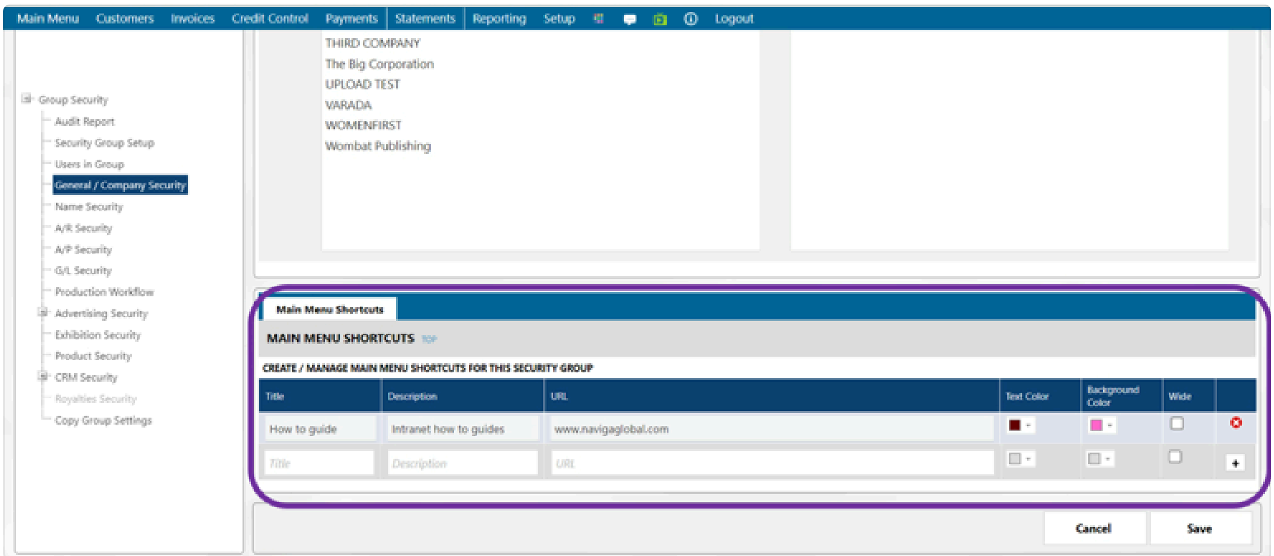
For prepayment values, there are also some new tags.

On Invoices, the tag #PREPAID_AMOUNT# behaves as it always has - it is the prepayment amount that is applied to the campaign. New tags #PREPAID_AMOUNT_WITH_FEE# will display the Prepaid amount plus any fees, and #PREPAID_AMOUNT_FEE# will display just the fee on its own.

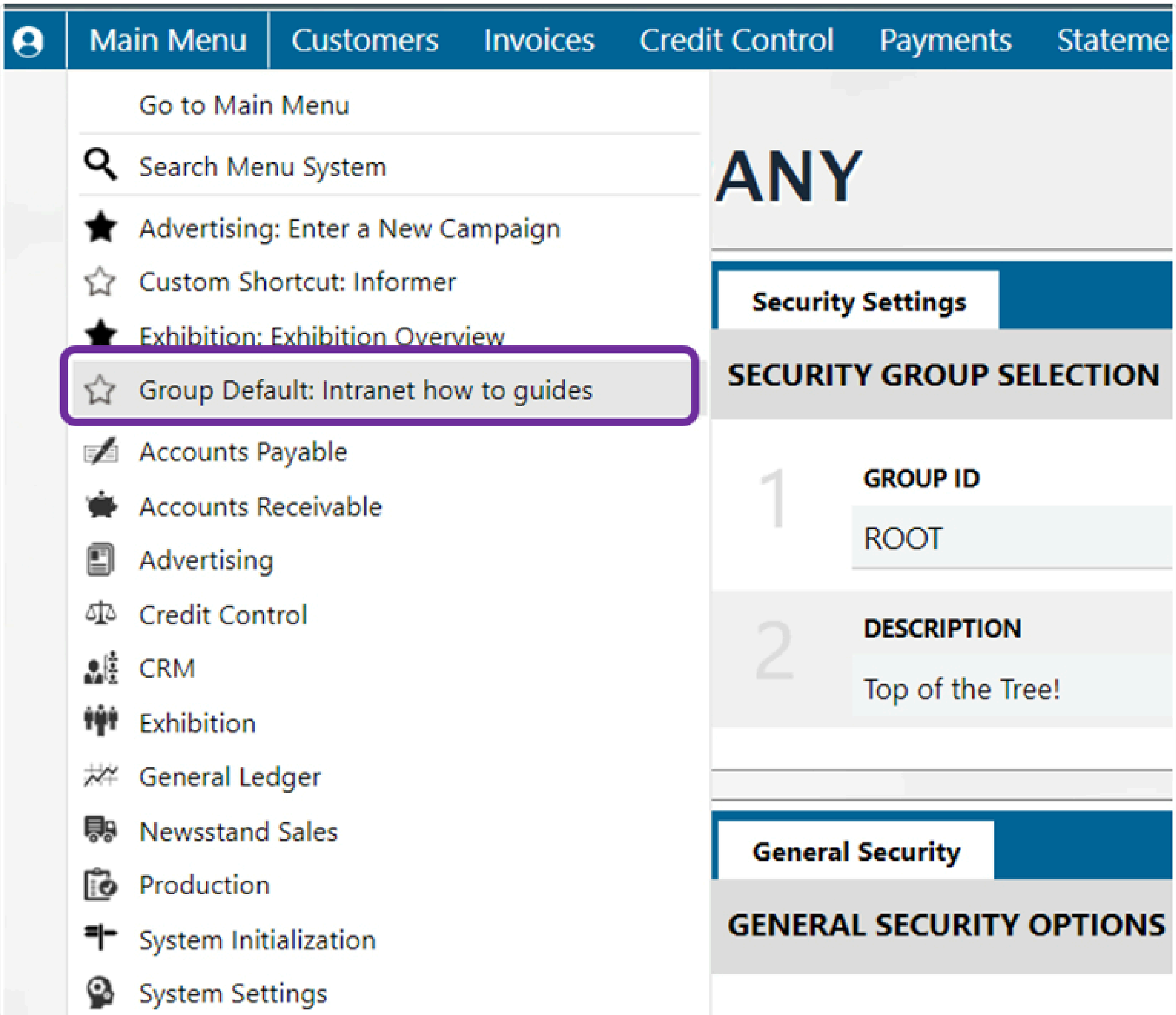
On Order Confirmations, the tag #PREPAY_AMOUNT# behaves as it always has - it is the prepayment amount that is applied to the campaign. New tags #PREPAY_AMOUNT_WITH_FEE# will display the Prepaid amount plus any fees, and #PREPAY_AMOUNT_FEE# will display just the fee on its own.

Security Group - Main Menu Shortcuts added to Menu

Several versions ago we added the ability for an admin to setup standard shortcuts for user groups:



Previously, the only access to these shortcuts were from the main menu dashboard upon logging in. We have now added these shortcuts to the "Main Menu" menu on screens throughout the system



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.

🎬 Click on the Video Icon in the heading to be directed to the release video page. Topics that were included in the release video will display this icon.