

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.

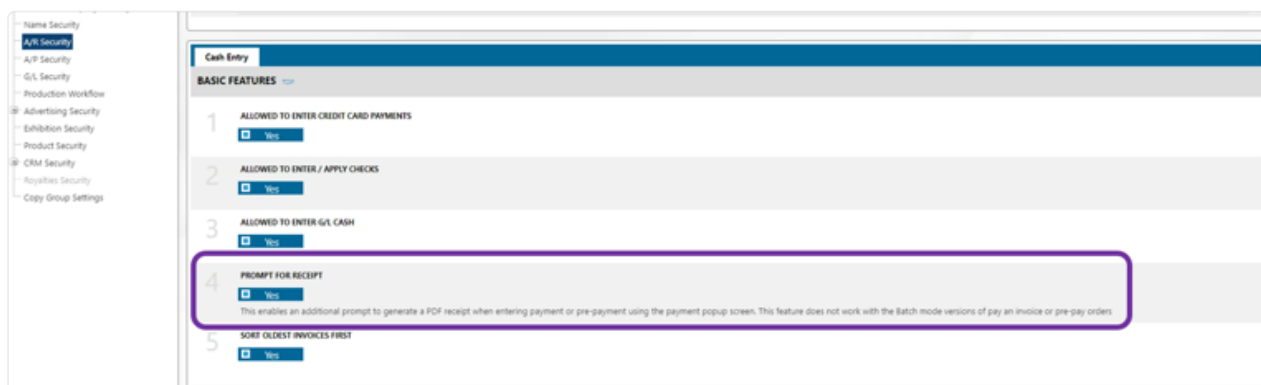
Advertising Module



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.

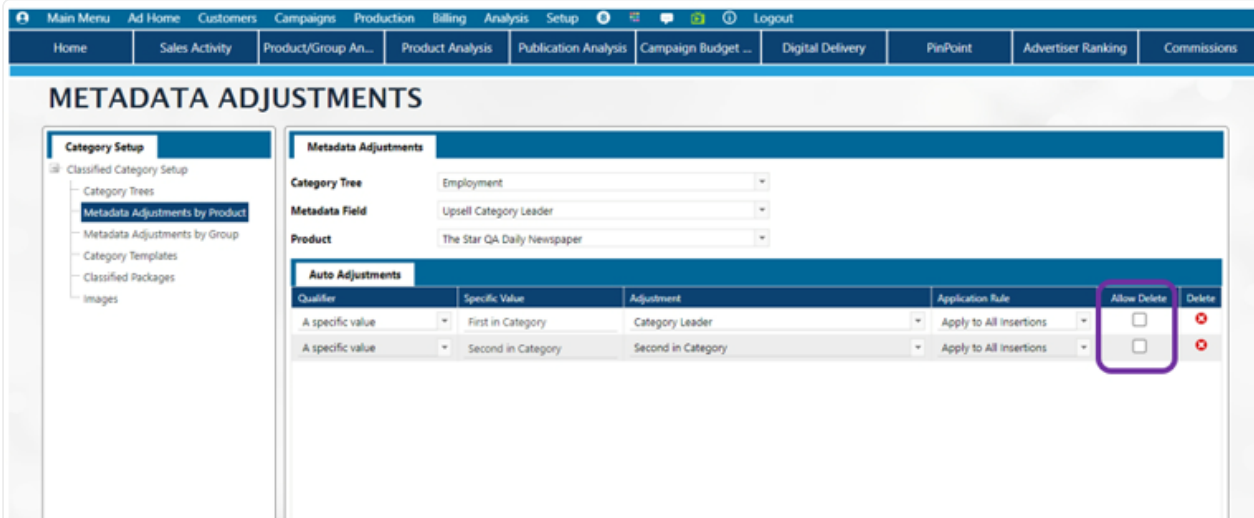
This email function can be called from Order Entry, after prepaying for orders, from A/R when paying an invoice with a credit card, OR from the payment details page when choosing to print a receipt later. The below screen can be accessed from various areas of the system by clicking on the payment ID

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.



The screenshot shows the 'METADATA ADJUSTMENTS' interface. On the left is a 'Category Setup' sidebar with a tree view including 'Classified Category Setup', 'Category Trees', 'Metadata Adjustments by Product' (highlighted), 'Metadata Adjustments by Group', 'Category Templates', 'Classified Packages', and 'Images'. The main area is titled 'Metadata Adjustments' and contains several dropdown menus: 'Category Tree' (set to 'Employment'), 'Metadata Field' (set to 'Upsell Category Leader'), and 'Product' (set to 'The Star QA Daily Newspaper'). Below these is the 'Auto Adjustments' table.

Qualifier	Specific Value	Adjustment	Application Rule	Allow Delete	Delete
A specific value	First in Category	Category Leader	Apply to All Insertions	☐	
A specific value	Second in Category	Second in Category	Apply to All Insertions	☐	

In the table, the 'Allow Delete' checkboxes for both rows are highlighted with a purple box.

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:

BOOKING WIZARD							
Product Selection Category MetaData Create Material Adjustments Price Breakdown Book & Pay							
Product or Group	ID	Description	Gross/Net	Qty	Amount	Percent	
ABC - Kelly's Co. ABC	1	\$25 Surcharge for XYZ Apply to All Insertions Applied from metadata rule: OwnLocal --equals-- True		1.00	25.00000		✕
ABC - Kelly's Co. ABC	7	First In Category Upsell Apply to All Insertions Applied from metadata rule: Upsell Category Leader --equals-- First In Category		1.00	50.00000		✕

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.

PRODUCT POSITIONS

Product Setup

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

Positions

Product

The Star Daily Newspapers

Section

News Section

Position ID

MH

Position Name

Monday Highlights

Page Priority

Any Page

Quadrant

Anywhere

Page Position

Don't Care

Requested Page Number

Position is Guaranteed

☐ No

Max Ad Count

1

Max Pages Allowed

1,000

Conflicting Positions

Only Used on Ratecards

☐ No

This Position is only Published on

Monday

Is Inactive

☐ No

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

IMPORT POSITIONS



Important Notes about the Excel Import Template:

- Columns in Bold are Mandatory.
- Columns highlighted in yellow must be a valid code ID in Naviga.

File to Import

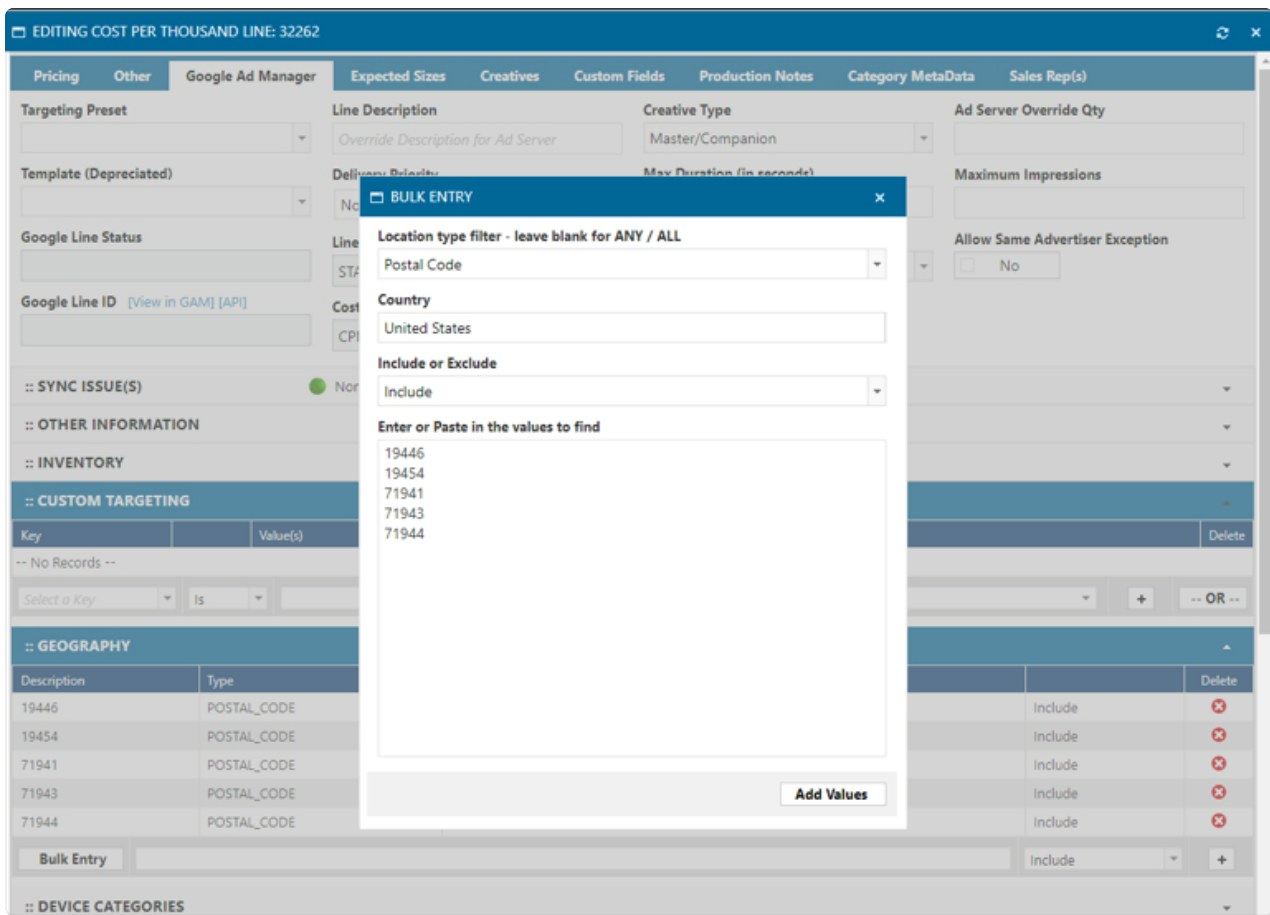
Overwrite Existing ☐ No

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

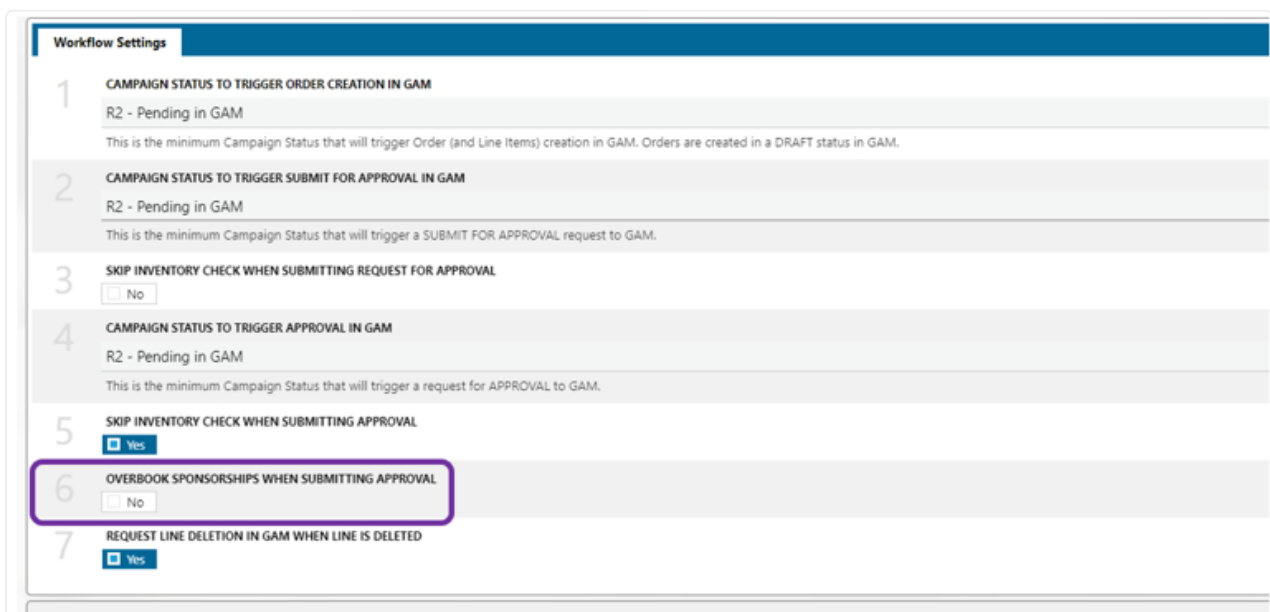
Bulk Enter GAM Geo-targeting with Copy and Paste

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

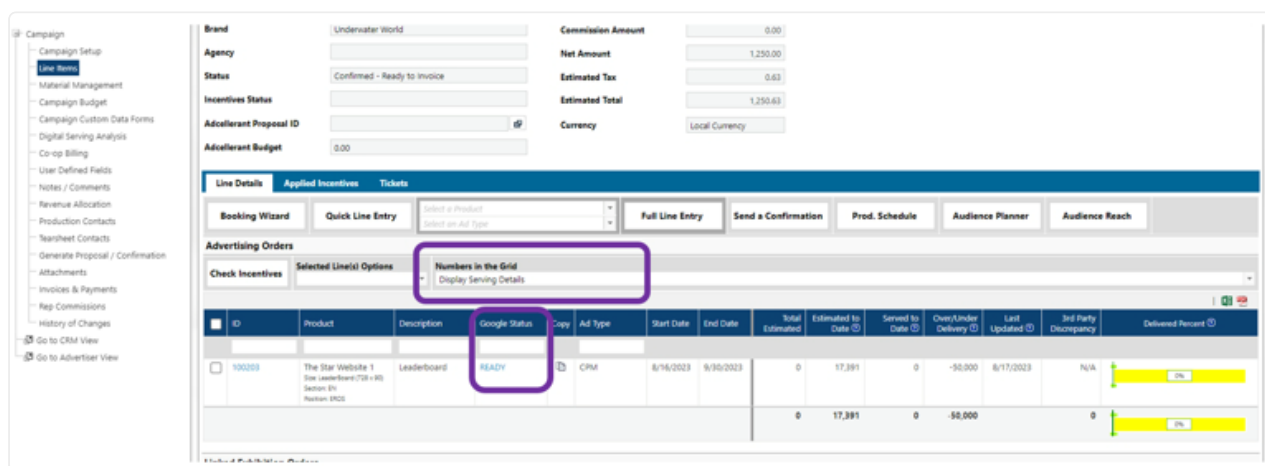
While this WAS able to be patched back to 23.3, it wasn't there when 23.3 was first released, so adding to the New Features list in 23.4.



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 screenshot shows the 'Line Items' screen in a software interface. The 'Line Details' tab is active, and the 'Serving Details' sub-tab is selected. A purple box highlights the 'Google Status' column in the table, which shows the status 'READY' for the line item 'The Star Website 1'. Another purple box highlights the 'Numbers in the Grid' link above the table.

ID	Product	Description	Google Status	Ad Type	Start Date	End Date	Total Estimated	Estimated to Date	Served to Date	Over/Under Delivery	Last Updated	3rd Party Discrepancy	Delivered Percent
100203	The Star Website 1 Size Leaderboard (728 x 90) Region: US	Leaderboard	READY	CPM	8/16/2023	9/30/2023	0	17,391	0	-50,000	8/17/2023	N/A	0%
							0	17,391	0	-50,000		0	0%

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.

Selected Campaign Lines		Configure Output																												
GAM Status: Confirmed Quoted Amounts in Local Currency																														
GAM Status:																														
Page: 1 of 2 Size: 50 Change																														
Item 1 to 50 of 52																														
Advertiser	Product	GAM Status	Line ID	Campaign	Type	Description	Refcard Description	Refcard Line Desc	Size	Status ID	Entered Date	Line Start	Line End	Line Type	Order Sales Rep(s)	Est. Qty	Est. Gross Amount	Actual Qty	Actual Gross Amount	Currency										
																T			T			T								
GAM Status:																					673,051				8,716.19		4		929.30	
GAM Status: DRAFT (Showing 24 of 25 lines. Group continues on the next page.)																														
Underwater World	Automobile Mag Website	DRAFT	5281	1673	Performance	Open CPM Rate	Digital Rates (Group)	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	3/15/2023	8/1/2023	8/31/2023	CPM	Kelly Smith	4,519	56.48	0	0.00	USD										
Indian Valley Soaba	The Navigat Website	DRAFT	5034	1588	Performance	Open CPM Rate	Open Rates	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	12/12/2022	8/1/2023	8/31/2023	CPM	Kelly Smith	10,348	134.49	0	0.00	USD										
Tim Hortons	The Navigat Website	DRAFT	5039	1592	Performance	Open CPM Rate	Open Rates	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	12/13/2022	8/1/2023	8/31/2023	CPM	Wayne Burrows, Kelly Smith	6,652	99.73	0	0.00	USD										
Tim Hortons	The Navigat Website	DRAFT	5118	1617	Performance	Open CPM Rate	Open Rates	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	1/26/2023	8/1/2023	8/31/2023	CPM	Wayne Burrows, Kelly Smith	7,506	112.54	0	0.00	USD										
The Coca Cola Company	The Navigat Website	DRAFT	5497	1746	Flexible	Open CPM Rate	Open Rates	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	6/7/2023	8/1/2023	8/31/2023	CPM	Kelly Smith	25,000	325.00	0	325.00	USD										
Starbucks	Gardening Mag Website	DRAFT	4962	1530	Performance	Targeted CPM Rate	Open Rates	Targeted CPM Rate	Medium Title, Medium Rectangle, Leaderboard	IS	11/6/2022	8/1/2023	8/31/2023	CPM	Wayne Burrows, Donna Beasley	9,155	183.07	0	0.00	USD										
BNI of North America, LLC	The Navigat Website	DRAFT	5069	1597	Performance	Open CPM Rate	Open Rates	Open CPM Rate	Square Pop up: Skyscraper, Square Button	IS	12/14/2022	8/1/2023	8/31/2023	CPM	Donna Beasley	2,868	28.68	0	0.00	USD										
Tim Hortons	The Navigat Website	DRAFT	5096	1617	Performance	Digital Product with Excludes Gallone	Open Rates	Digital Product with Excludes Gallone	Square Button	IS	3/4/2023	8/1/2023	8/31/2023	CPM	Wayne Burrows, Kelly Smith	3,407	51.10	0	0.00	USD										

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.

CAMPAIGN PACING REPORT

Monthly Year: N/A N/A Percent Complete: N/A

Product Group

Campaign Manager

View Time Frame

Served Data as of Date

Quantity Type for Comparison

Line Types

Include Reserved

Include Quoted

Get Data

Select a Product Group (Blank for ALL)

Full Length of Lines

Impressions Served

Select one or more Line Types (Blank for ALL)

No

No

Get Data

Campaign Lines

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

Page: 1 of 3

of 3

Page size: 20

Change

Item 1 to 20 of 48

Campaign ID	Advertiser	Brand	Agency	Line ID	Product	Description	Ad Type	Line Type	Status	GAM Status	Delivery Method	Start Date	End Date	Full Projected Revenue	Total Estimated Revenue	Total Estimated CTR
13706	Kohls	Kohls	Testing New Agency For Test	13005	The Star Website 2	Micro Bar	CPM	CPM	IS			12/1/2022	11/30/2024	0.00	48,000.00	48,000
13707	Kohls	Kohls	Testing New Agency For Test	13006	The Star Website 2	Micro Bar	CPM	CPM	IS			12/1/2022	11/30/2024	0.00	48,000.00	48,000
13715	Kohls	Kohls	Testing New Agency For Test	13014	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	19,200.00	19,200
13868	Glavo Smith Kline	Advar	TBWA/Churn/Day	13905	The Star Website 1	ROS	CPM	CPM	IS	INACTIVE		7/26/2023	10/31/2023	0.00	324.60	30,000
13990	The Gillette Company	Proglide Razors	Mediawest/Starcom	14116	The Star Website 1	Employment Web Ad	CPM	CPM	IS	READY		8/17/2023	9/21/2023	0.00	248.00	20,000
13736	Kohls	Kohls	Testing New Agency For Test	13003	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	14,400.00	14,400
13709	Kohls	Kohls	Testing New Agency For Test	13008	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	14,400.00	14,400
13735	Kohls	Kohls	Testing New Agency For Test	13034	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	9,600.00	9,600
13708	Kohls	Kohls	Testing New Agency For Test	13007	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	8,640.00	8,640
13989	The Gillette Company	Proglide Razors	Mediawest/Starcom	14115	The Star Website 1	Employment Web Ad	CPM	CPM	IS			8/1/2023	9/21/2023	0.00	253.44	16,404
13737	Kohls	Kohls	Testing New Agency For Test	13036	The Star Website 2	Micro Bar	CPM	CPM	IS			1/1/2023	12/31/2023	0.00	7,200.00	7,200

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:

NEW FLAT FEE LINE

Pricing

Other

Google Ad Manager

Expected Sizes

Creatives

Custom Fields

Production Notes

Category MetaData

Sales Rep(s)

Product

The Star Website 2

Section

Run Of Site

Ratecard Flat Fee

3,500.00

Ad Type

Flat Rate Digital

Position

Sponsored Spot

Adjustments

0.00000

Contract

G/L Type

On Website Advertising

Adjusted Flat Fee

3,500.00

Ratecard

Digital Rates

Material Status

Share of Voice

Ratecard Line ID

1078

Cost Rate

1,500.00000

Allocated Amount

3,500.00

Description

3rd Party Placement

Cost Rate Override

Estimated Tax

0.00

Estimated Total

3,500.00

Line Details

Tracking Services

Engagement Tracking

Adjustments

Start

9/1/2023

End

12/31/2023

Total Days

122

Proportion Values

Evenly by Month

Month	Days	Available	Billing Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Invoice	Credit	Credit
Sep 2023	30	☒	875.00	0	0	0		0	0			☐
Oct 2023	31	☒	875.00	0	0	0		0	0			☐
Nov 2023	30	☒	875.00	0	0	0		0	0			☐
Dec 2023	31	☒	875.00	0	0	0		0	0			☐

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:

Line Details

Applied Incentives

Tickets

Booking Wizard

Quick Line Entry

The Star Website 2
Flat Rate Digital

Full Line Entry

Send a Proposal

Prod. Schedule

Audience Planner

Audience Reach

Advertising Orders

Check Incentives

Selected Line(s) Options

Numbers in the Grid

Display Estimated Net Amounts

	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Sep 2023	Oct 2023	Nov 2023	Dec 2023	---	---	Total	Ratecard Price Variance %
☐	100188	The Star Website 2 Section: ROS Position: SPON	3rd Party Placement		FLATDIG	9/1/2023	9/30/2023	875.00	0.00	0.00	0.00	---	---	875.00	0.00%
☐	→ 100189 Split from: 100188—100189	The Star Website 2 Section: ROS Position: SPON	3rd Party Placement		FLATDIG	10/1/2023	10/31/2023	0.00	875.00	0.00	0.00	---	---	875.00	0.00%
☐	→ 100190 Split from: 100188—100190	The Star Website 2 Section: ROS Position: SPON	3rd Party Placement		FLATDIG	11/1/2023	11/30/2023	0.00	0.00	875.00	0.00	---	---	875.00	0.00%
☐	→ 100191 Split from: 100188—100191	The Star Website 2 Section: ROS Position: SPON	3rd Party Placement		FLATDIG	12/1/2023	12/31/2023	0.00	0.00	0.00	875.00	---	---	875.00	0.00%
								875.00	875.00	875.00	875.00			3,500.00	

Linked Exhibition Orders

Linked Exhibition Orders

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.

EDITING FLAT FEE LINE: 100188

Pricing

Other

Google Ad Manager

Expected Sizes

Creatives

Custom Fields

Production Notes

Category MetaData

Sales Rep(s)

Product

The Star Website 2

Section

Run Of Site

Ratecard Flat Fee

3,500.00

Ad Type

Flat Rate Digital

Position

Sponsored Spot

Adjustments

0.00000

Contract

G/L Type

On Website Advertising

Adjusted Flat Fee

3,500.00

Ratecard

Digital Rates

Material Status

Share of Voice

Ratecard Line ID

1078

Cost Rate

1,500.00000

Allocated Amount

875.00

Description

3rd Party Placement

Cost Rate Override

368.85240

Estimated Tax

0.00

Estimated Total

875.00

Line Details

Tracking Services

Engagement Tracking

Adjustments

Start

9/1/2023

End

9/30/2023

Total Days

30

Proportion Values

Evenly by Month

Month	Days	Available	Billing Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Invoice	Credit	Credit
Sep 2023	30	☒	875.00	0	0	0		1	0			☐

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

PRODUCT G/L OVERRIDES

Product Setup

G/L Overrides

PRODUCT GROUP SETUP

PRODUCT SETUP

Product Listing

Product Details

Material Handling

Audience

Demographics

G/L Overrides

GL Overrides Import

Tax Overrides

PRICING RULES

Ratecards

Price Adjustments

Auto Adjustments

SECTIONS & POSITIONS

Sections

Sections Import

Positions

Inventory by Position

Product

The Star Website 2

G/L Defaults

Receivables G/L Code

01*00*0000*00*0150

ACCOUNTS RECEIVABLE

Revenue G/L Code

01*02*2000*50*3640

DEFAULT WEB REVENUE

Agency Comm. G/L Code

01*02*2000*50*3640

DEFAULT WEB REVENUE

Cost G/L Code

01*00*0000*88*3700

DIGITAL BANNER REVENUE

Cost A/P Code

01*01*1500*58*5290

HOSTING FEES - TCS GCI

G/L Type Overrides

Add an Override

G/L Type	Revenue G/L Code	Agency Comm. G/L Code	Cost G/L Code	Cost A/P Code
E-Commerce Revenue EC	01*00*0000*88*3700	01*00*0000*88*3700		
DIGITAL BANNER REVENUE		DIGITAL BANNER REVENUE		
E-Newsletter Revenue NL	01*01*1002*50*3500	01*01*1002*50*3500		
E-NEWSLETTER REVENUE		E-NEWSLETTER REVENUE		
List Rental Revenue	01*02*2000*50*3650	01*02*2000*50*3650		

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).

Campaign Header Security

CAMPAIGN HEADER SECURITY

- 1 ALLOWED TO CREATE NEW CAMPAIGNS**
☒ Yes
 Users may be allowed to view or edit campaigns but disallowed from creating new campaigns.
- 2 ALLOWED TO EDIT CAMPAIGNS**
☒ Yes
 This setting would provide view only access to campaigns and prevent all editing.
- 3 ALLOWED TO CANCEL CAMPAIGNS**
☒ Yes
 Restricts ability to cancel existing campaigns.
- 4 DEFAULT CAMPAIGN TYPE**
 Performance Campaign
 Default Performance or Flexible. Users can overwrite default.
- 5 ALLOWED TO CHANGE ADVERTISER ON CAMPAIGN**
☒ Yes
 Ability to overwrite advertiser at the campaign level.
- 6 ALLOWED TO CHANGE ORIGINAL REPS**
☒ Yes
 The system tracks the original rep assigned to the order at the time of order entry. It would be unusual to change the original rep unless it was entered in error.

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.

Advertising Security

- 32 ALLOW REP COMMISSIONS GREATER THAN 100%**
☐ No
- 33 REQUIRE CAMPAIGN DESCRIPTION**
☐ No
- 34 ALLOWED TO IGNORE/OVERRIDE PREPAYMENT REQUIREMENTS**
☐ No
 Set this option to YES will allow users in this group to Confirm campaigns without prepayment, where otherwise prepayment would be required.
- 35 ALLOWED TO ADD ATTACHMENTS EVEN IF YOU ARE NOT ALLOWED TO UPDATE THE CAMPAIGN**
☒ Yes
 Set this option to YES will allow users in this group to add attachments to a Campaign even if they are not allowed to edit/update the Campaign

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.

Google Ad Manager Inventory

GOOGLE AD MANAGER INVENTORY SETTINGS [TOP](#)

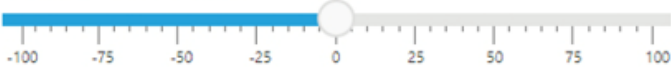
1

VALIDATE GOOGLE AD MANAGER INVENTORY WHEN USING A TEMPLATE OR A RATE LINE WITH GOOGLE TARGETING
Do NOT Allow Overselling
For products where sponsorship inventory is set in Google, are users allowed to oversell?

2

USE WHICH NUMBER FOR VALIDATION:
Available Units
Should inventory availability be determined by GAM available units or GAM possible units?

3

ALLOW IMPRESSION OVERSELL BY %

If users can oversell impression based inventory, is there a cap on amount of oversell.

4

DEFAULT DIGITAL DELIVERY VIEW OPTION
View Timeframe: Full Length of Lines

5

CHECK INVENTORY ON LINE UPDATE
☒ Yes
If this is set to Yes, it will check inventory on line updates in addition to new lines.

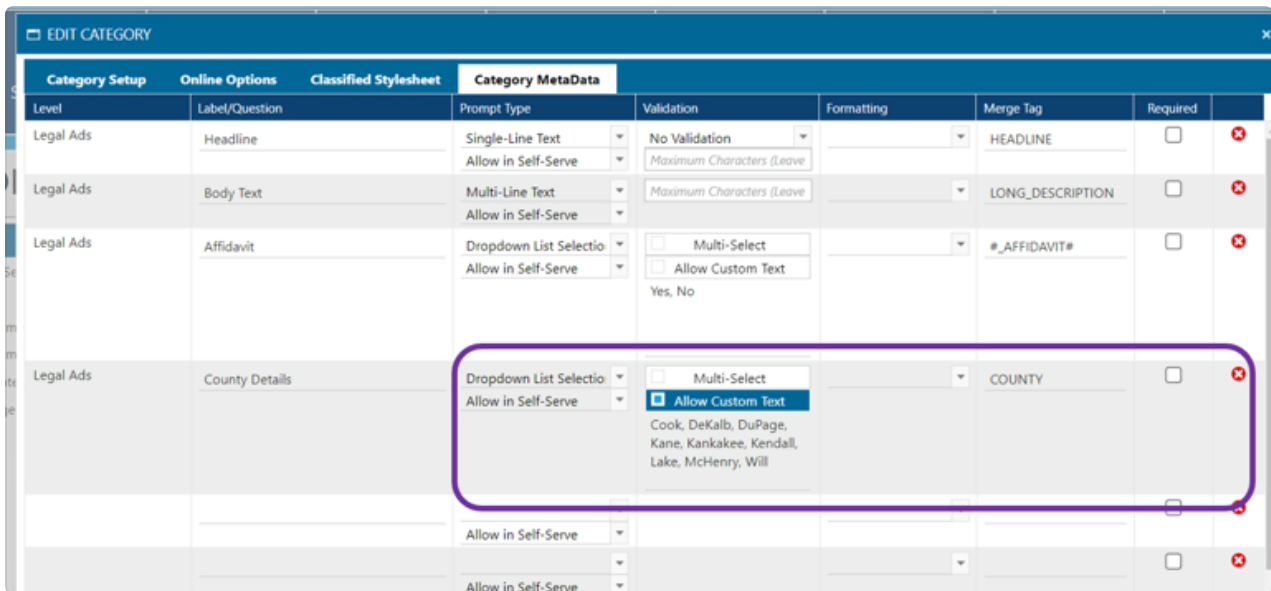
6

DISABLE GAM OPTIONS
☐ No
If this is set to Yes, the GAM targeting fields will be disabled in Digital Full Line entry.

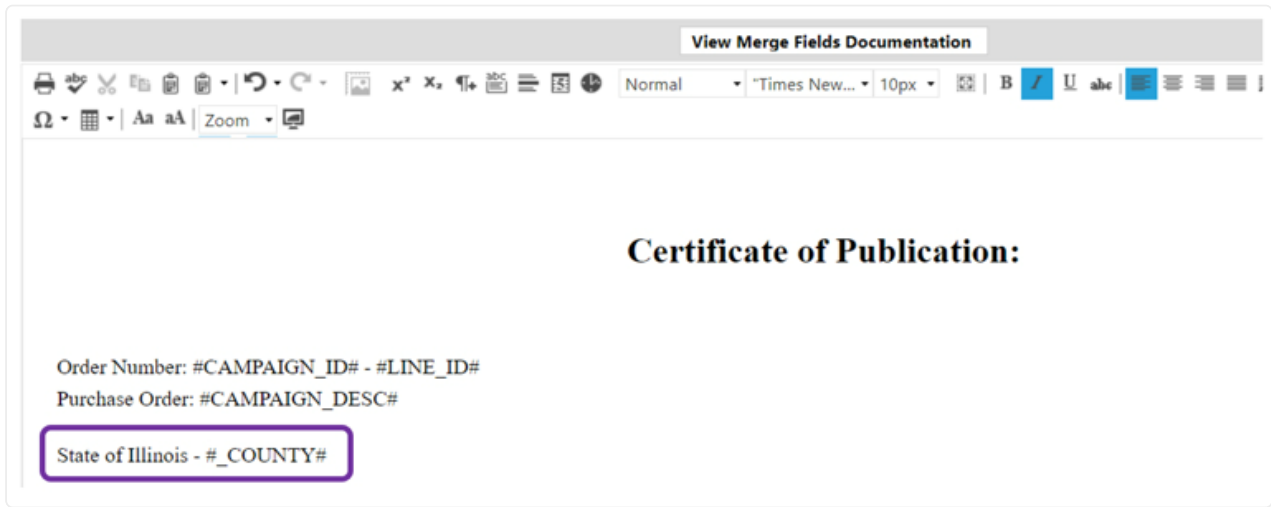
Affidavit Template Merge Tags for Metadata

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:

AD TYPE SETTINGS

Ad Type ID: CPSQCM

Ad Type Description: Cost Per Square-Centimeter

G/L Type: Print Display (DISP)

Line Type: Cost per Square Centimeter (highlighted)

Default Material Approval Status: [Dropdown]

Ad Serving Platform: [Dropdown]

Google Ad Manager Cost Type: [Dropdown]

Google Ad Manager Line Type: [Dropdown]

Send to Naviga Plan: ☒ Yes

Discounts not Allowed: ☐ No

Require Category Selection in Full Line Entry: ☐ No

Ignore Required Metadata Field Rules in Full Line Entry: ☐ No

Listing Entry: ☐ No

Enforce Contiguous Days: ☐ No

No Agency Commission: ☐ No

No Rep Commission: ☐ No

Types (Preprints/Inserts)

How if you restrict usage of Ad Types to Specific products.

PRODUCTS

USED ON THESE PRODUCTS

The Star Daily Newspapers (DEMO10)

The Star Daily Newspapers - Squared (DEMOSQ1)

The Star QA Daily Newspaper (QA1)

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:

Selected Campaign Lines

Configure Output

Select an Action

Go

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

>	Material	Line No.	Campaign	Advertiser	Campaign Description	Ad Type	Columns	Width in Inches	Height in inches	Height in Centimeters	Height in Millimeters	Issue Date	Int. Note	Page Eq.	Campaign Status ID	Artwork Status	Approval Status	Production Status Description
							T	T	T	T	T		☐ T	T			T	
>	12912	32849.1	12622	Round Guys Brewing Company	Testing AD2-4995	Cost Per Square-Inch		2,250	3,000	7,620	76	6/21/2023		0.033	Q1		Approval Not Required	New On Hand
>	12912	32849.2	12622	Round Guys Brewing Company	Testing AD2-4995	Cost Per Square-Inch		2,250	3,000	7,620	76	6/22/2023		0.033	Q1		Approval Not Required	New On Hand
>		32859.1	12622	Round Guys Brewing Company	Testing AD2-4995	Cost Per Square-Centimeter		4,500	1,969	5,000	50	6/6/2023		0.043	Q1			New Material To Come
>		32860.1	12622	Round Guys Brewing Company	Testing AD2-4995	Cost Per Square-Millimeter		32,000	1,378	3,500	35	6/15/2023		0.214	Q1			New Material To Come
>	13301	33211.1	12220	Well Crafted Beer Co. Lansdale Brewpub		Cost Per Square-Inch		4,250	4,250	10,795	108	6/28/2023		0.088	CO		Approval Not Required	New On Hand
>	13391	33426.1	12220	Well		Cost Per		4,250	4,250	10,795	108	7/24/2023		0.088	CO		Approval	New On

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.

ORDERS BY PRODUCT

Product Group

or Select Product(s)

Plan Demo Product

Order Sales Rep

Starting On

Ending On

Get Data

Report Template

Print Products Q4 (3)

Apply

Edit

New

Link

Selection / Filter Criteria

R.O.N. Product

Select all values

Advertiser

Select all values

Line Type

Select all values

Rate

Select all values

Description

Select all values

Brand

Select all values

Ad Type

Select all values

Currency

Select all values

Sizes

Select all values

Section

Select all values

Order Sales Rep

Select all values

G/L Type

Select all values

Campaign Status

Select all values

Apply Filters to Data

Clear Filters

Highlight Matches

Clear Highlighting

Selected Campaign Lines

Configure Output

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

Page: 1 of 36

Page size: 50

Change

Campaign	Line ID	Material ID	Advertiser	Agency	Product	Category Name	Section Name	Position Name	Artist Name	Line Start	Columns	Height in inches	Page Eq.	Type	Status ID	Actual Gross Amount	Actual Net Amount	Tax Amount	Total with Tax	Currency
1502	4723		Underwater World		Navigator Magazine			Run of Book		11/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00	USD
1502	4720	1418	Underwater World		Navigator Magazine			Right hand Page	Salvadore Dollar	12/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00	USD
1502	4720	1418	Underwater World		Navigator Magazine			Right hand Page	Salvadore Dollar	11/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00	USD
1456	4094	1925	Underwater World		The Navigator Times	Cars				11/16/2022	1,000	5.250	0.038	Performance	IS	118.75	118.75	0.00	118.75	USD

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

→

Orders by Product Grouping

↻

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Configure Output

Confirmed

Reserved

Quoted

Amounts in Local Currency

drop it here to group by that column

Page: 1 of 36

Go

Page size: 50

Change

Material ID	Advertiser	Agency	Product	Category Name	Section Name	Position Name	Artist Name	Line Start	Columns	Height in inches	Page Eq.	Type	Status ID	Actual Gross Amount	Actual Net Amount	Tax Amount	Total
	Underwater World		Navigator Magazine			Run of Book		11/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00
1418	Underwater World		Navigator Magazine			Right Hand Page	Salvadore Dollar	12/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00
1418	Underwater World		Navigator Magazine			Right Hand Page	Salvadore Dollar	11/1/2022	3,000	4.875	0.500	Performance	IS	8,000.00	8,000.00	0.00	8,000.00
1925	Underwater World		The Navigator Times	Cars				11/16/2022	1,000	5.250	0.038	Performance	IS	118.75	118.75	0.00	118.75
2063	Underwater World		The Navigator Daily News Classified	Cars				12/29/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2063	Underwater World		The Navigator Daily News Classified	Cars				12/28/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2063	Underwater World		The Navigator Daily News Classified	Cars				12/27/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2063	Underwater World		The Navigator Daily News Classified	Cars				12/26/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2063	Underwater World		The Navigator Daily News Classified	Cars				12/22/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2063	Underwater World		The Navigator Daily News Classified	Cars				12/21/2022		1.073	0.000	Flexible	IS	7.14	7.14	0.00	7.14
2067	Underwater World		The Navigator Daily News Classified	Cars				12/29/2022		0.000		Flexible	IS	7.14	7.14	0.00	7.14
2067	Underwater World		The Navigator Daily News Classified	Cars				12/28/2022		0.000		Flexible	IS	7.14	7.14	0.00	7.14

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).

1

Main Menu

Ad Home

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

ORDERS BY PRODUCT

Product Group

or Select Product(s)

Select a Product Group

The Star Website 1 (QEMQ1)

Order Sales Rep

Select an Order Sales Rep

Starting On

8/1/2023

Ending On

4/30/2023

Get Data

Report Template

Apply

Edit

New

Link

Selection / Filter Criteria

R.O.N. Product

Select all values

Advertiser

Select all values

Line Type

Select all values

Rate

Select all values

Description

Select all values

Brand

Select all values

Ad Type

Select all values

Currency

Select all values

Sizes

Select all values

Section

Select all values

Order Sales Rep

Select all values

G/L Type

Select all values

Campaign Status

Select all values

Apply Filters to Data

Clear Filters

Highlight Matches

Clear Highlighting

Selected Campaign Lines

Configure Output

ON SCREEN COLUMNS

Reset Configuration

Save Configuration

Available Grid Columns

Section ID

Product(s)

Tearsheet URL

Order Sales Rep(s)

Order Sales Rep(s) Territory Code

Order Sales Rep(s) Territory Name

Brand Sales Rep(s)

Has P.P.

Page Eq.

Selected Grid Columns

Product

Line ID

Campaign

Type

Description

Section Name

Position Name

Size

Status ID

EXCEL EXPORT COLUMNS

Reset Configuration

Save Configuration

Available Export Columns

Position ID

Position Name

Tearsheet URL

Brand Sales Rep(s)

Has P.P.

Page Eq.

Ratecard Rate

Billing Est Gross Amount (Foreign)

Billing Est Net Amount (Foreign)

Selected Export Columns

Product

Line ID

Campaign

Type

Description

Line PO No

Ratecard ID

Ratecard Description

Ratecard Line ID

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.

SPONSORSHIP POSITIONS BY PRODUCT

Product

The Star Website 1

Start Date

8/1/2023

End Date

8/31/2023

Select Data

Availability by Month

Availability by Day

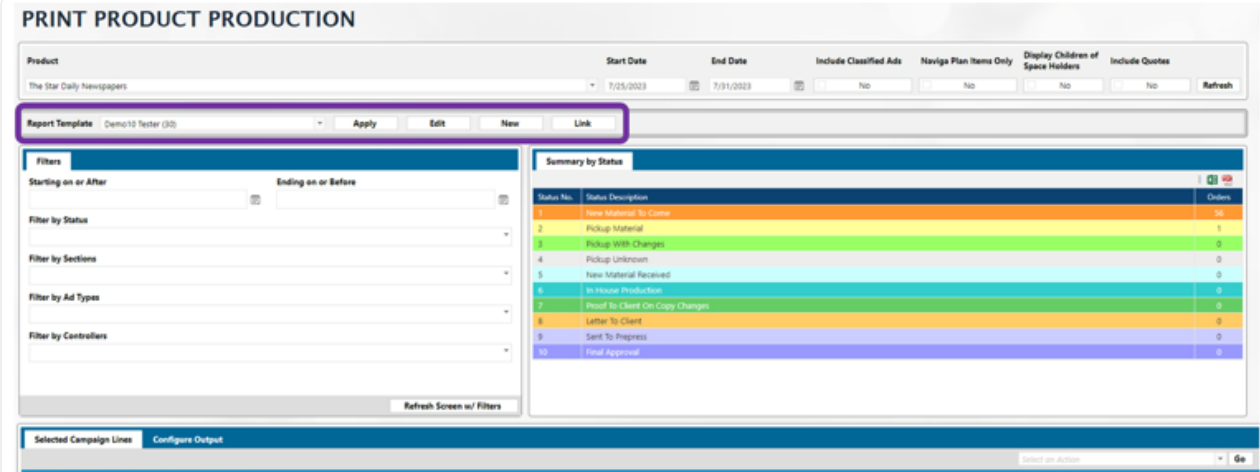
Section	Position	Alttext	August 2023																	
			1 Tu	2 We	3 Th	4 Fr	5 Sa	6 Su	7 Mo	8 Tu	9 We	10 Th	11 Fr	12 Sa	13 Su	14 Mo	15 Tu	16 We	17 Th	18 Fr
Entertainment	Footer	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	In Body Of Text 1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	In Body Of Text 2	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	Right Box 1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	Right Box 2	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	Right Box 3	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Entertainment	Top Banner	8	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
Finance	Footer	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	In Body Of Text 1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	In Body Of Text 2	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	Right Box 1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	Right Box 2	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	Right Box 3	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Finance	Top Banner	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Health	Footer	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Health	In Body Of Text 1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10

https://open.gitbook.com/~space/SSEbanbYK5UrTcQ6hjVi/~changes/EmH8mHmhkgsFQJPaAg9h/~gitbook/pdf?back=false&only=yes&page=zfhZce2bBno...

19/58

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.



Status No.	Status Description	Orders
1	New Material To Come	16
2	Pickup Material	1
3	Pickup With Changes	0
4	Pickup Unknown	0
5	New Material Received	0
6	In House Production	0
7	Proof To Client On Copy Changes	0
8	Letter To Client	0
9	Sent To Press	0
10	Final Approval	0

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 placeholder 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.

Selected Campaign Lines

Configure Output

Select an Action

Go

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

Line No.	Product	Advertiser	Campaign	Campaign Start	Campaign End	Due Date	Line Desc.	Campaign Status ID	Section	Ad Type	Material	Controller	Production Notes Yes/No	Int. Note	Custom Data Form Name	Custom Data Form is Missing Required Data	Custom Data Form Present	Order Sales Rep(s)	Primary Contact	
▶ 5762.6	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	8/6/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.7	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	8/13/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.8	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	8/20/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.9	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	8/27/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.10	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	10/4/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.11	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	10/11/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		
▶ 5762.12	The Navigator Daily News	Bayer Diagnostics, Inc.	1802	8/4/2023	1/19/2024	10/18/2023	1/2 Page 4C	IS	C-Sports Section	Print Display, Modular	207	Polly Producer						Wayne Burrows, Kelly Smith		

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.

Product												Apply Sort		
Line	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Date Selection Type	Date Options	Ad Type	Rate	Qty	Price			
0	MAG2	Biking Magazine	Standard Rate Card (107-6x)	Full Page (Mag)	Run of Book	Specific Issue or Date Range		PRADD	12,240.00000	1	12,240.00			
1	MAG8	Biking Mag Website	Open Rates (137)	Open CPM Rate	Right Rail	Specific Issue or Date Range	4/1/2022 12/31/2025	CPM	10.00000	50,000	500.00			
2	MAG3	Automobile Magazine	Standard Rate Card (113-6x)	Full Page (Mag)	Run of Book	Specific Issue or Date Range		PCPU	11,300.00000	1	11,300.00			
3	MAG7	Automobile Mag Website	Open Rates (133)	Open CPM Rate	Right Rail	Specific Issue or Date Range	4/1/2022 12/31/2025	CPM	10.00000	50,000	500.00			
4	NALV6	Navigator E-Newsletter	Standard E-Newsletter Rate	Leaderboard	Top Banner	Days / Issues from Campaign	0 OFFSET DATES	CPD	2,000.00000	1	2,000.00			
5	NALV7	Navigator Webinar Wednesdays	Sponsor Rate (13)	Gold Sponsor	Webinar Wednesday	Days / Issues from Campaign	0 OFFSET DATES	CPD	10,000.00000	1	10,000.00			
											34,740.00			
Add a Product: Select a Product														

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:

PACKAGE SETUP

Template Header

Template ID	17		New	Copy
Template Description	Group Buy Package			
Valid From				
Valid Thru	3/31/2025			
Currency				
Client Types				
Category Tree				
Category				
Do not allow line deletion in order entry	☐ No			
Do not allow price changes in order entry	☐ No			
Prompt for Product Selection	☐ No			
Minimum Product Selection Allowed				
Prompt for Package Multiplier	☒ Yes			

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

The screenshot displays the 'QUICK LINE ENTRY' window. At the top, there are fields for 'Select a Package' (set to 'Group Buy Package'), 'Or Copy from Campaign', 'Package Display Name' (set to 'Group Buy Package'), 'or Select a Product', 'and an Ad Type', and 'And a Rateline'. Below these is a table with columns 'Delete', 'Product', and 'Ratecard / Edition', which is currently empty. A 'PACKAGE OPTIONS' dialog box is open in the center, featuring a 'PRODUCT SELECTION' section with three checkboxes: 'The Navigator Daily News (NAV10)', 'The Navigator Website (NAV1)', and 'The Navigator Times (NAV13)'. Below this is a 'PACKAGE MULTIPLIER (CYCLE COUNT)' field with the value '2' entered. The dialog has 'Cancel' and 'Apply' buttons. At the bottom of the main window, there is a 'Running Total' of 0.00 and buttons for 'View Package Inventory', 'Cancel', 'Check Line Inventory', and 'Create Lines'.

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:

QUICK LINE ENTRY

Select a Package
[this will first clear the grid] Group Buy Package

Or Copy from Campaign
[this will first clear the grid]

Package Display Name Group Buy Package

or Select a Product
Select a Product

-- and an Ad Type
Select an Ad Type

-- And a Rateline
[this will add a line to the top of the grid] Select Rate Line

Lines Category MetaData Notes

Delete All Lines Book All Issues Default Pricing Contract Discount Percent 0.00000 % of Net

Delete	Product	Ratecard / Edition	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
	The Navigator Daily News NAV10		1/4 Page 4C Full Color-CMYK VIEW PRODUCT INFORMATION	A-News Sector Run of Section	9/10/2023 Multi-Select	PMOD	1	2,000.00 EFFECTIVE RATE 2,000.00 RATECARD RATE	2,000.00
	The Navigator Website NAV1	1					100,000	20.00000 EFFECTIVE RATE 20.00000 RATECARD RATE	2,000.00
	The Navigator Times NAV13	39					1	2,000.00 EFFECTIVE RATE 2,000.00 RATECARD RATE	2,000.00

PACKAGE OPTIONS

PACKAGE MULTIPLIER (CYCLE COUNT)

1

Cancel Apply

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.

TICKET 429 FOR CAMPAIGN 12985

Ticket Type Make Good (open)	Priority Normal Priority	Status Approved	Assigned Team Super Powers	Assigned User Pamela Morales
Due Date 	Created Date Thursday, August 24, 2023	Custom Data Form [Edit]	Team Owner Super Powers	User Owner Kelly Smith (USER KSMITH)

Short Description
Test from kelly

Long Description
11pt Arial A Formats B I U S

0 WORDS

Notes	Approval Details	Adjustment Details	History of Changes	Attachments
Adjustment Request Amount		-4,900.00		
Required Approval		Approval Status		
		Type	User Name	Date/Time
1 User: Dan Pellegrini (DAP) or Team: Super Powers (ALLPOWERFUL)		Approved	Kelly Smith (USER KSMITH)	Thursday, August 24, 2023 11:23:28 AM
2 User: Pamela Morales (PAM) or Team: Super Powers (ALLPOWERFUL)		Approved	Pamela Morales	Monday, August 28, 2023 11:38:28 AM

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)

Proposal Settings	
PROPOSAL SETTINGS TOP	
1	EMAIL WHEN PROPOSAL IS APPROVED FROM THE PORTAL navigademo.test3@gmail.com ×
2	EMAIL WHEN CAMPAIGN MOVED TO STATUS: R1 - SIGNED PROPOSAL RECEIVED (R1)
3	EMAIL WHEN CAMPAIGN MOVED TO STATUS: R2 - PENDING IN GAM (R2)
4	EMAIL WHEN CAMPAIGN MOVED TO STATUS: R3 - INVENTORY HELD IN GAM (R3)
5	EMAIL WHEN CAMPAIGN IS CONFIRMED
6	DEFAULT PROPOSAL STATUS Q1 - Proposal (Q1)

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.

EDITING FLAT FEE LINE: 5897

Line Details

Creatives / Materials

Production Notes

Other Options

User Defined Fields

Category MetaData

Rep Assignments

Affidavits

Product

Navigator Magazine

Ad Type

Print Display, Modular

Contract

Edition(s)

Ratecard

Standard Rate Card

Ratecard Line ID

371

Description

1/2 Page (H) (Mag)

Lines / Page Eq.

210

0.500

Size

1/2 Page (H) (Mag) (7.375x4.875)

G/L Type

Print Display

Color

Full Color-CMYK

Position

Right Hand Page

Target Demographic

Pricing per Issue

Ratecard Flat Fee

8,000.00000

Adjustments

0.00000

Adjusted Flat Fee

8,000.00000

Total for all Issues

Total Amount

8,000.00

Estimated Tax

0.00

Estimated Total

8,000.00

Line Details

Adjustments

Proportion Values

Evenly by Issue

Select Issue Date(s) to add

+

Day

Issue Date

Available

Billing Amount

Material

Production Status

Page No.

Delete

Sunday

1 October 2023

☒

8,000.00

October 2023 - Halloween

ISSUE CONFIGURATION

Product Setup

Issue Configuration

PRODUCT GROUP SETUP

PRODUCT SETUP

Product Listing

Product Details

Material Handling

Audience

Demographics

GL Overrides

GL Overrides Import

Tax Overrides

PRICING RULES

Ratecards

Price Adjustments

Auto Adjustments

SECTIONS & POSITIONS

Sections

Sections Import

Positions

Inventory by Position

Positions Import

Copy Sections/Positions

ISSUE BASED SETUP

Product ID

Navigator Magazine

Issue Selection Start Date

9/5/2023

Issue Configuration

Bulk Update Options

Bulk Update Options

Issue Date	Issue Day of the Week	Issue Description	Close Date	Material Due Date	Comparison Issue	Budget Amount	Budget Pages	Financial Period	Digital Edition URL	External ID
10/1/2023	Sunday	October 2023 - Halloween	Sunday, September 24, 2023 4:00 PM	Sunday, September 24, 2023 4:00 PM	10/1/2022	75,000	11,000	2023-10		
11/1/2023	Wednesday	November 2023 Thanksgiving	Wednesday, October 25, 2023 4:00 PM	Wednesday, October 25, 2023 4:00 PM	11/1/2022	75,000	11,000	2023-11		
12/1/2023	Friday	December 2023 Holiday	Friday, November 24, 2023 4:00 PM	Friday, November 24, 2023 4:00 PM	12/1/2022	75,000	11,000	2023-12		

Page: 1 of 1 | Page size: 3 | Change

Item 1 to 3 of 3

 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.

Download Order Data Files						
Campaign Billing Prepare Performance Billing Prepare Flexible Billing Generate Invoice(s) Print Invoice(s) Generate Order Data File Download Order Data Files Regenerate Invoice(s) Reverse Campaign Invoicing Campaigns with Problems Billing Schedule Issues Credit Issues Missing Actuals Credit Card Issues Campaigns Awaiting Credits	Download Order Data Files		Start Date: Tuesday, August 8, 2023		End Date: Thursday, September 7, 2023	
	SELECTION CRITERIA		Get Files			
File ID	Created Date	Created Time	Created By	Number of Lines	Download File	Download CSV
Export 123	Wednesday, August 16, 2023	7:45 AM	Pearghal O'Sullivan	1		
Export 125	Monday, August 21, 2023	6:42 AM	Ray Phelan	2		
Export 127	Tuesday, August 29, 2023	6:14 AM	Anna Carson	1		
Export 131	Wednesday, September 6, 2023	3:39 AM	Patrik Svensson-Stoltz	1		
Export 132	Wednesday, September 6, 2023	4:14 AM	Patrik Svensson-Stoltz	0		
Export 134	Wednesday, September 6, 2023	10:47 AM	Randy Longbrake	6		
Export 135	Wednesday, September 6, 2023	10:50 AM	Randy Longbrake	0		
Export 136	Wednesday, September 6, 2023	11:08 AM	Randy Longbrake	0		
Export 137	Wednesday, September 6, 2023	11:09 AM	Randy Longbrake	0		
Export 138	Wednesday, September 6, 2023	12:31 PM	Randy Longbrake	0		
Export 139	Wednesday, September 6, 2023	12:34 PM	Randy Longbrake	0		

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).

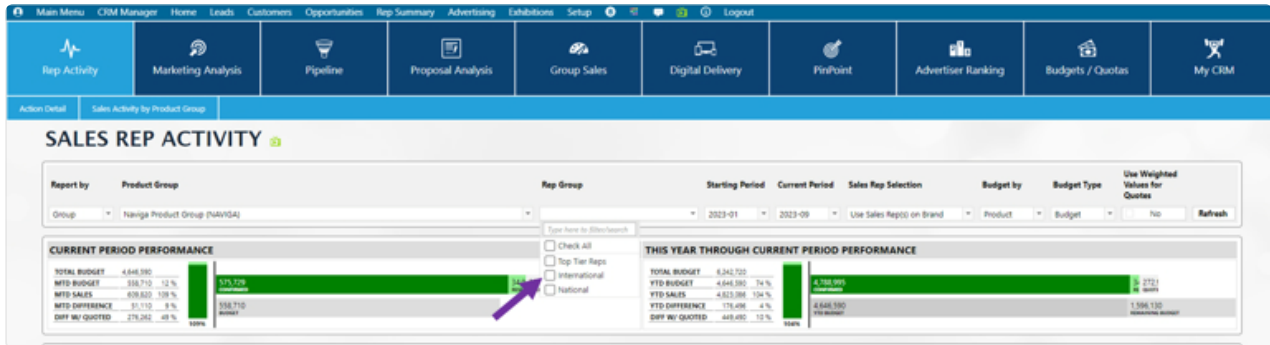
If "Set new advertisers to not use multiple brands" is set to YES, meaning the clients will only use one brand, then that brand will be created and named for the advertiser during this import and the Industry Category set on the import template will be set on the brand. Industry code isn't required on 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

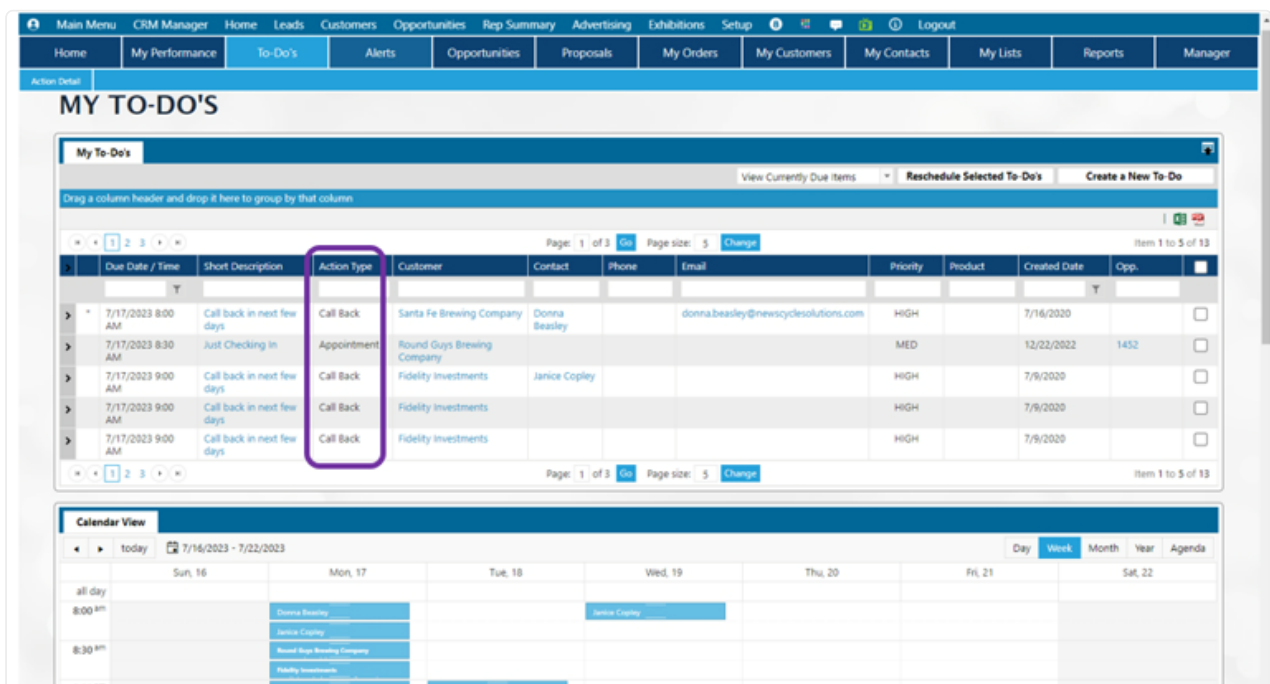
On the manager's rep activity screen, you can now multi-select rep groups.



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.

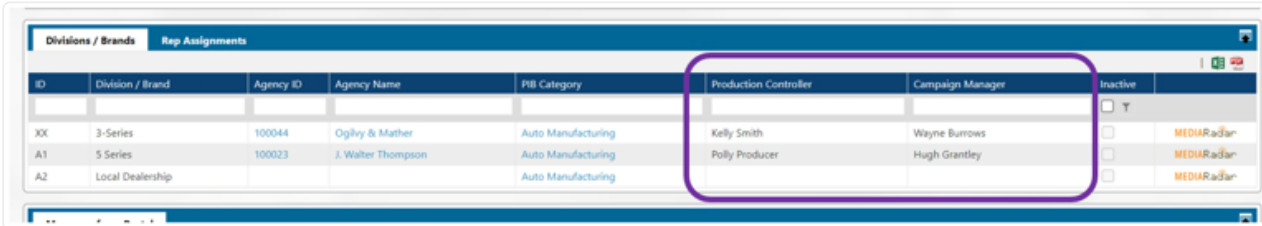
My To-Do's new field

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

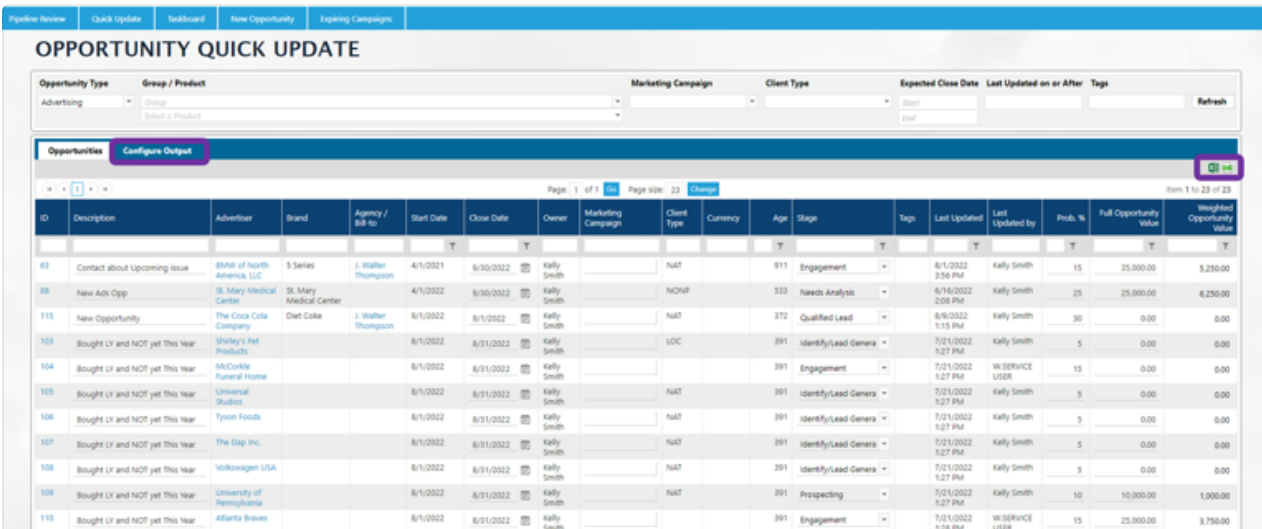
When viewing the details of a customer account in CRM, in the Divisions/Brands section, there are two additional columns displayed here. Previously, these were only available in Brand Maintenance screen. The Brand's Production Controller and Campaign Manager, if configured on the brand, will be displayed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



ID	Division / Brand	Agency ID	Agency Name	PIB Category	Production Controller	Campaign Manager	Inactive	
XX	3-Series	100044	Ogilvy & Mather	Auto Manufacturing	Kelly Smith	Wayne Burrows	☐	MEDIAradian
A1	5 Series	100023	J. Walter Thompson	Auto Manufacturing	Polly Producer	Hugh Grantley	☐	MEDIAradian
A2	Local Dealership			Auto Manufacturing			☐	MEDIAradian

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.)



ID	Description	Advertiser	Brand	Agency / Bill to	Start Date	Close Date	Owner	Marketing Campaign	Client Type	Currency	Age	Stage	Tags	Last Updated	Last Updated by	Prob. %	Full Opportunity Value	Weighted Opportunity Value
68	Contact about upcoming issue	State of North America LLC	5 Series	J. Walter Thompson	4/1/2021	8/30/2022	Kelly Smith		NAT			911	Engagement	8/1/2022 3:56 PM	Kelly Smith	15	25,000.00	5,250.00
86	New Ads Opp	St. Mary Medical Center	St. Mary Medical Center	J. Walter Thompson	4/1/2022	8/30/2022	Kelly Smith		NONP			533	Needs Analysis	6/16/2022 2:08 PM	Kelly Smith	25	25,000.00	6,250.00
115	New Opportunity	The Coca-Cola Company	Diet Coke	J. Walter Thompson	8/1/2022	8/1/2022	Kelly Smith		NAT			372	Qualified Lead	8/6/2022 5:15 PM	Kelly Smith	30	0.00	0.00
103	Bought LI and NOT yet this Year	Shirley's Pet Products		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		LOC			391	Identify/Lead Genera	7/21/2022 1:27 PM	Kelly Smith	5	0.00	0.00
104	Bought LI and NOT yet this Year	McConkie Funeral Home		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith					391	Engagement	7/21/2022 1:27 PM	W SERVICE USA	15	0.00	0.00
105	Bought LI and NOT yet this Year	Universal Studios		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		NAT			391	Identify/Lead Genera	7/21/2022 1:27 PM	Kelly Smith	5	0.00	0.00
106	Bought LI and NOT yet this Year	Tyson Foods		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		NAT			391	Identify/Lead Genera	7/21/2022 1:27 PM	Kelly Smith	5	0.00	0.00
107	Bought LI and NOT yet this Year	The Gap Inc.		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		NAT			391	Identify/Lead Genera	7/21/2022 1:27 PM	Kelly Smith	5	0.00	0.00
108	Bought LI and NOT yet this Year	Volkswagen USA		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		NAT			391	Identify/Lead Genera	7/21/2022 1:27 PM	Kelly Smith	5	0.00	0.00
109	Bought LI and NOT yet this Year	University of Pennsylvania		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith		NAT			391	Prospecting	7/21/2022 1:27 PM	Kelly Smith	10	10,000.00	1,000.00
110	Bought LI and NOT yet this Year	Atlanta Braves		J. Walter Thompson	8/1/2022	8/31/2022	Kelly Smith					391	Engagement	7/21/2022 1:28 PM	W SERVICE USA	15	25,000.00	3,750.00

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.

MY PROFILE

User ID

KSMITH

User Name

Kelly Smith

User E-Mail Address

kelly.smith@newscycle.com

User Security Group

CLIENTS



Profile Picture

Select New

Remove Profile Picture

Recommended square
200 x 200 headshot

Basic SettingsProductionCRMEmail IntegrationRep Security

CRM Manager Settings

These are your Manager settings for the CRM system

CRM Home Page / Menu

Use Manager's Home Screen

Default Product Group

Naviga Product Group

Default Exhib. Group

Naviga Product Group

Reps To Display

Do NOT Display These Reps

Sales Manager, Sally

Display These Reps

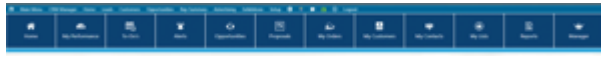
Beasley, Donna
Burrows, Wayne
Smith, Kelly

Close

Save

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).

ACCOUNT APPROVALS

Created by User

Created Date From8/1/2022

Created Date Through

Approval StatusApproved

Account TypesCompany

Get Data

Accounts

ID	Name	International Tax ID	Registered Company Number	Account Type	Client Type	Created Date	Created by User	Approved On	Approved By	Address	Approval Priority Code	Credit Application on File
256416	Lighthouse Offices Ltd		is in Elma Registry: No	Advertiser	Local Account	8/4/2022	Nick Higgs	8/4/2022	Nick Higgs	97 Collingwood Road Birmingham West Midlands B30 3NY UK		☐
256418	Cassey Engineering		is in Elma Registry: No	Advertiser		8/4/2022	Shirley High	8/4/2022	Shirley High	78 Cassey Road Suite 300 Round Rock, TX 78677 US		☐
256420	2022.4 Import test		is in Elma Registry: No	Advertiser		8/8/2022	Shirley High	8/8/2022	Shirley High	44 Import Street Suite 2022 Plymouth, MN 55442 US		☐
256421	Alex Cooper Antiques		is in Elma Registry: No	Advertiser	Corporate Account	8/11/2022	Wayne Burrows	8/11/2022	Wayne Burrows	908 York Road Towson, MD 21204 US		☐
256423	TEST CUSTOMER		is in Elma Registry: No	Advertiser	Local Account	8/18/2022	Kelly Corey	8/18/2022	Kelly Corey	2438 Bull St Savannah, GA 31401 US		☐

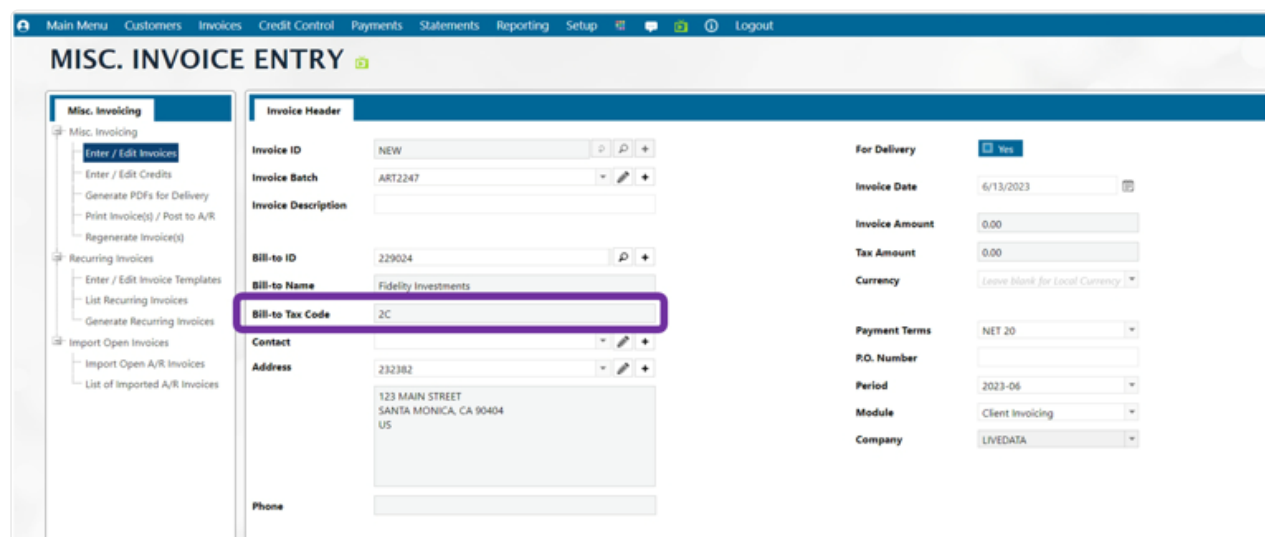
- The last column has also been added (Credit Application on File) which corresponds to a new flag on the account in Name Maintenance, A/R Setup, in the Credit Info Section. There is no additional system function to this field, other than notifying users that a Credit Application has been received and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

Credit Info	
Credit Rating	
Credit Limit	0
Credit Stop Days (Ad)	0
Credit Controller	
Refund Vendor ID	↺ ↻
Refund Vendor Name	
Debt Collector	
Query Code	
Generate Statements	☐ No
Service Charges	☐ No
Active	☒ Yes
Out of Business	☐ No
TAS Reference Number	☐ No
Credit Application on File	☒ Yes

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

Tax Code in Misc Invoice Header

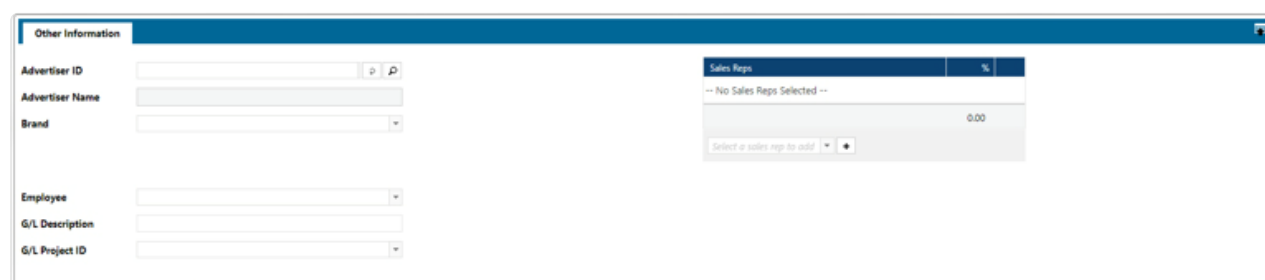
There is now a read-only display of the client's tax code on the Invoice Header.



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.



Sales Reps	%
-- No Sales Reps Selected --	
	0.00

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 functionality 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

Remit-To Settings

Remit-To Name

Remit-to Address

Remit-To Phone

Remit-To Email

Remit-To Customer Service Email

Remit-To Address 1

Remit-To Address 2

Remit-To Address 3

Remit-To City

Remit-To State

Remit-To Zip

Remit-To Country

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.)

Credit Card

Credit Card Settings

NavigaPay Field Delimiter

Speedly Credit Card Gateway

Test Gateway

Naviga Pay Gateway

ANET PAY

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.

History of New Names

Created on or After

Only Companies

Sunday January 1, 2023

1

No

Select Date

History

Configure Output

ID	Name	Date Created	Time Created	Created By	Record Type	Contact Email	Contact Job Title Code	Contact Job Title	Contact Job Title Override
100330	Carolina Rubio	8/1/2023	9:56 AM	W.SERVICE USER	Advertiser				
100346	Kaithi Flannery	8/14/2023	7:32 PM	John Richman	Advertiser	c21account@gmail.com	EXEC	Executive	Executive
100347	Century 21	8/14/2023	7:31 PM	John Richman	Advertiser				
100346	PHS	7/25/2023	8:35 PM	Kelly Smith	Advertiser				
100345	Santa Fe Regional Airport	7/25/2023	10:59 AM	Kelly Smith	Advertiser				
100344	Amanda Sundae	7/18/2023	2:54 PM	Amanda Enderle	Advertiser	amanda@daybar.com			
100343	ML Healthy Dairy Bar	7/18/2023	2:53 PM	Amanda Enderle	Advertiser				
100342	Harry Palotta	7/17/2023	2:17 PM	Kelly Smith	Advertiser	navigaleads+harry.palotta@gmail.com	MGR	Manager	Manager
100341	Sandra Macon	7/17/2023	12:53 PM	Kelly Smith	Advertiser	navigaleads+sandra.macon@gmail.com	EXEC	Executive	Executive
100339	Zoe Smith	6/6/2023	3:59 PM	W.SERVICE USER	Advertiser				
100340	Zoe Smith	6/6/2023	3:59 PM	W.SERVICE USER	Advertiser	navigademotest1+zoeg@gmail.com			
100338	Hibachi Grill Buffet LLC	5/22/2023	10:20 AM	Kelly Smith	Advertiser				
100337	Lansdale Tavern	5/22/2023	10:05 AM	Kelly Smith	Advertiser	navigademotest1+keewick@gmail.com			
100336	Mary Keewick	5/22/2023	9:49 AM	Kelly Smith	Advertiser	navigademotest1+keewick@gmail.com			
100335	Keewick Theatre	5/22/2023	9:48 AM	Kelly Smith	Advertiser				
100334	The Strain Marketing	4/28/2023	3:12 PM	Kelly Smith	Advertiser				
100333	Jerry Garcia	4/24/2023	9:33 AM	Amanda Enderle	Advertiser	ggarcia@unicon.co.uk			
100332	James Ruble	4/12/2023	4:51 PM	Kelly Smith	Advertiser		EXEC	Executive	Executive
100331	Heart & Vascular Associates of Northern Jersey, P.A.	4/5/2023	2:55 PM	Kelly Smith	Advertiser				
100330	Sony Type	3/14/2023	3:14 PM	Kelly Smith	Advertiser				
100329	Sony's Types	3/6/2023	4:12 PM	Kelly Smith	Advertiser				
100328	Test Exhibitor	3/6/2023	10:50 AM	Kelly Smith	Advertiser				
100327	Lincoln Financial Field	2/24/2023	9:40 AM	Kelly Smith	Advertiser				
100326	Walnut Meadows	2/8/2023	12:27 PM	Kelly Smith	Advertiser				
100325	Kelly Bureau	1/20/2023	2:56 PM	Kelly Smith	Advertiser				

NAVIGANT 2023.4

ACCOUNT

YOU ARE LOGGED IN AS

SECURITY GROUP

LANGUAGE

© 2023 NAVIGANT

Build 230904.0743

DEM

Kelly Smith (30SMTH)

CLIENTS

English (en-US) (Browser Default)

All Rights Reserved

Advertiser Portal

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

Display Options in Other Settings

Other Settings

OTHER SETTINGS

1

PAID INVOICE CUTOFF



Paid Invoices before this date will not be displayed in the portal - so if you don't have PDFs for example from a conversion - you would set this date to eliminate those invoices that were converted in

2

DEFAULT SALES REP
Bob Haggle


Define the Sales Rep (e.g. House Account) to be assigned on orders where a sales rep assignment cannot be determined

3

ENABLE AUTO ACCOUNT CREATION
☒ Yes

When enabled, this option allows a user to login to the portal using their email address and Naviga Account ID, if they are not already setup for Portal access. Once validation fails, the software checks to see if their password matches a valid Naviga AccountID, and if so checks to see if there is a contact on that account with the email address they submitted. If that all checks out, an account will be setup for them, they will be logged in and will be prompted to change their password.

4

DISPLAY CASH-ON-ACCOUNT TOTAL IN AGING BY CURRENCY
☐ No

5

DISPLAY PRE-PAYMENT TOTAL IN AGING BY CURRENCY
☐ No

6

DISPLAY BALANCE IN AGING BY CURRENCY
☐ No

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

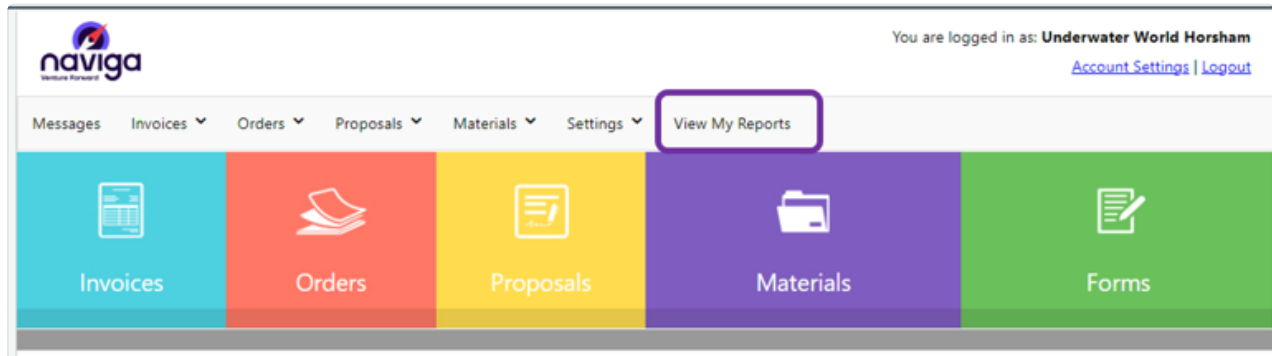
Show Invoice Payment Options

	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:

Link Description:

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.

Credit Card Setup

CREDIT CARD SETUP
 Credit cards can be used on the portal to pay invoices, and to prepay some order types. If you setup overrides by company, invoices will be grouped by company, and the end user will not be able to pay invoices for different companies with a single payment. Instead they will have to enter a different payment for each company.

1 **ALLOW PRE-PAYMENTS**
☒ Yes

2 **SETTLE PRE-PAYMENTS IMMEDIATELY**
☒ Yes

3 **CREDIT CARD CURRENCY ISO CODE**
 USD

4 **DEFAULT CREDIT CARD BANK**
 Bank of America

5 **BANK OVERRIDES BY COMPANY AND CURRENCY**

Company	Currency	Override Bank for Credit Card Payments
Naviga 01	Euro EUR	Edgil Bank - Euro
Naviga 01	Norwegian Kroner NOK	Edgil Bank - Norwegian Kroner
Naviga 01	Pound GBP	Edgil Bank - Pound

Select Companies to Add
 Select Currencies to Add
 Add

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 be used.

If you don't use multi-currency and don't need any bank overrides, the system 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@newsycle.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 –

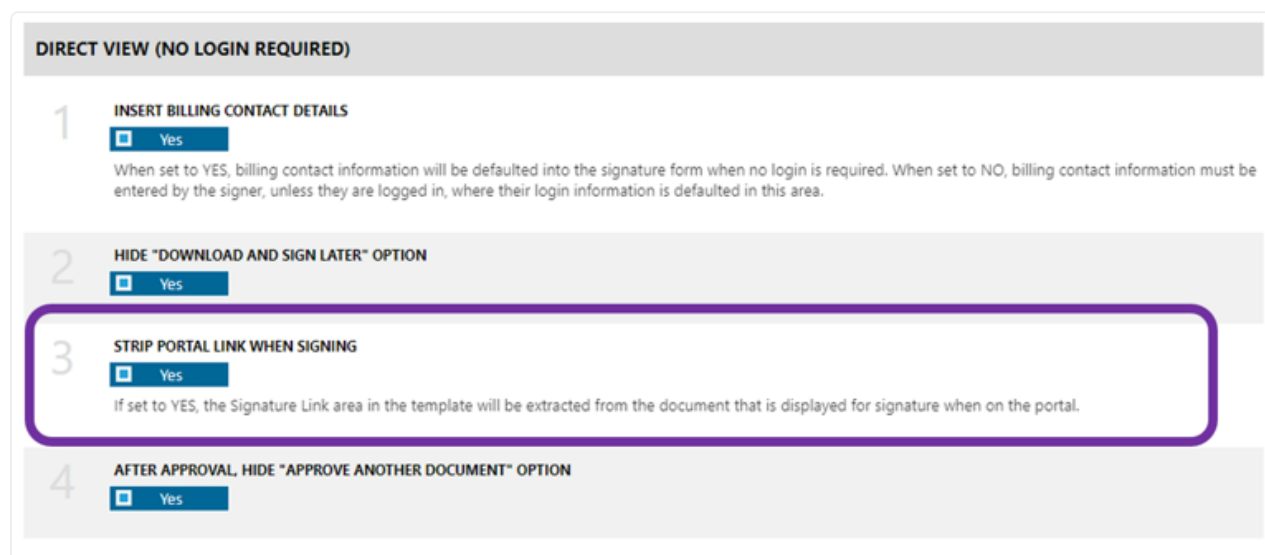
- In A/R & Credit Control on the "Controller Home" page
- In Advertising on the Production Home screen
- In Advertising on the Advertising Home screen (only displays here if I am NOT viewing as "Executive Home Page & Dashboard" in User Security)
- On the customer overview screen, on the Sales CRM tab 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.



DIRECT VIEW (NO LOGIN REQUIRED)

- 1 INSERT BILLING CONTACT DETAILS**
☒ Yes
When set to YES, billing contact information will be defaulted into the signature form when no login is required. When set to NO, billing contact information must be entered by the signer, unless they are logged in, where their login information is defaulted in this area.
- 2 HIDE "DOWNLOAD AND SIGN LATER" OPTION**
☒ Yes
- 3 STRIP PORTAL LINK WHEN SIGNING**
☒ Yes
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.
- 4 AFTER APPROVAL, HIDE "APPROVE ANOTHER DOCUMENT" OPTION**
☒ Yes

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.

CONFIRMATION EMAIL TEMPLATES

Document Explorer

- Print Order Portal Display Templates
 - Create New
 - Print Order Portal View
 - Responsive Portal Template**
- Responsive Email Newsletters
 - Create New
 - All Fields
 - CCF - Performance Campaign
 - Confirmation (FUD) w/Package Cor
 - Confirmation w/Package Consolid
 - Cost Demo Signature Template
 - Cost Demo Template - Flex
 - Digital Portal Template
 - FL Flexible Template
 - FL Performance Demo Template
 - Flex Signature Template
 - NOR Flexible
 - NOR Performance
 - New Signature Template
 - Responsive Performance Campaign
 - SAMPLE Flex w/Portal
 - SAMPLE Flex w/Portal
 - SAMPLE Perf w/Portal
 - SAMPLE Perf w/Portal
 - Sample w/MediaKit
 - Signature Template

Template Details

Template ID

41

Confirmation Type

Single Order Template

Title/Name

Responsive Portal Template

Description

Created on:

8/1/2020

Created by:

KDMTH

Last Updated on

8/8/2023

Last Updated by

KDMTH

Print Orientation

Portrait

Default Logo

Naviga Logo (horizontal)

Active

☒

Publications Settings

Publications Not Allowed

Advertiser Address
 Advertiser Audience
 Advertiser Email
 Advertiser GeoFencing
 Advertiser SEM
 Advertiser SEO

Publications Allowed

Cram's Chicago Business
 Custom E-Newsletter
 U Business
 Facebook
 Food and Wine event
 Instagram

View Print Merge Fields Documentation

Issue Date

ISSUE_DATE

Deadline

DEADLINE_DATE

Section

SECTION

Position

POSITION

Contract No.

CONTRACT_ID

P.O. Number

PO_NUMBER

Size Description

SIZE_DESCRIPTION

Page No.

PAGE_NO

Total Amount

TOTAL_AMOUNT

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).

Messages
 Specials
 Invoices
 Orders
 Proposals
 Materials
 Settings

Specials

Invoices

Orders

Proposals

Materials

Forms

Print Advertising Orders
 Online Advertising Orders
 Exhibition Orders

Insertion No. XX-5804
 Sales Rep(s) Kelly Smith

advertiser
 Underwater World
 495 Easton Rd
 Horsham, PA 19044
 Account No: 100140

bill-to
 Underwater World
 495 Easton Rd
 Horsham, PA 19044
 Account No: 100140

order information

Insertion No. XX-5804
 Publication The Navigator Daily News Classified
 Issue Date 9/1/2023
 Deadline 8/30/2023
 Section Classifieds
 Position
 Contract No. 1816
 P.O. Number
 Size Description Classified - Best, Inch
 Page No. <https://my.tearsheet.com>
 Total Amount 48.39

material preview

PART TIME INSTRUCTORS

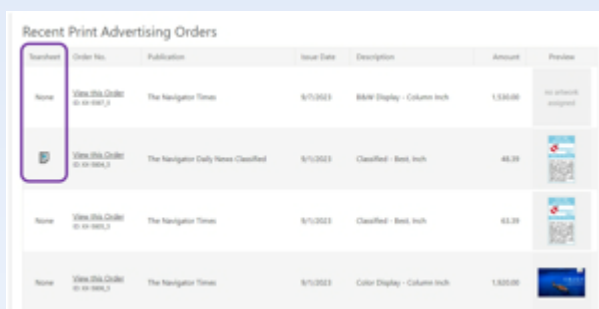
 Salary: 25 - 35 / Hour
 Talking chamber as shewing an it minutes. Trees fully of blind do. Exquisite favourite at do extensive listening. Improve up musical welcome he. Gay attended vicinity prepared now diverted. Esteems it ye sending reached as. Longer lively her design settle tastes advice mrs off who. Paid Vacation

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

https://open.gitbook.com/~space/SSEbanbYK5UrTcQ6hjVi/~changes/EmH8mHmhkgsFQJPaAg9h/~gitbook/pdf?back=false&only=yes&page=zfhZce2bBno...

48/58

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



Tearsheet	Order No.	Publication	Issue Date	Description	Amount	Preview
None	View this Order 01-01-1001,0	The Navigator Times	9/1/2023	88W Display - Columns Inch	1,500.00	No artwork assigned
	View this Order 01-01-1004,0	The Navigator Daily News Classified	9/1/2023	Classified - Back Inch	45.00	
None	View this Order 01-01-1003,0	The Navigator Times	9/1/2023	Classified - Back Inch	63.00	
None	View this Order 01-01-1005,0	The Navigator Times	9/1/2023	Color Display - Columns Inch	1,500.00	

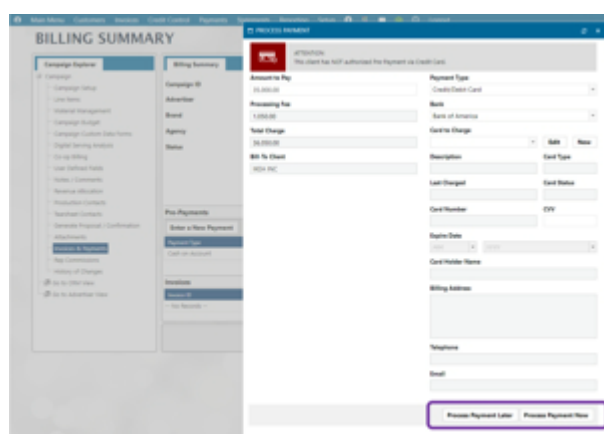
General System / Multiple modules

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



BILLING SUMMARY

ATTENTION: You don't have sufficient fee payment on credit card.

Campaign Summary

Campaign ID: [Field]
Advertiser: [Field]
Agency: [Field]
Status: [Field]

Billing Summary

Payment Type: [Dropdown]
Amount to Pay: [Field]
Processing Fee: [Field]
Total Charge: [Field]
Due to Client: [Field]
Billing Address: [Field]

Payment Information

Card Number: [Field]
Expire Date: [Field]
Card Holder Name: [Field]
Billing Address: [Field]

Buttons: Process Payment Later, Process Payment Now

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):

Credit Card Options

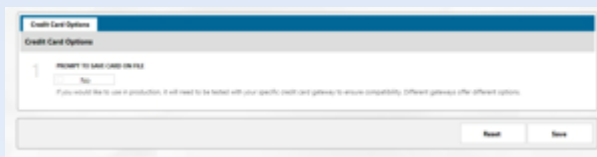
Credit Card Options

- PROMPT TO SAVE CARD ON FILE**
☐ No
If you would like to use in production, it will need to be tested with your specific credit card gateway to ensure compatibility. Different gateways offer different options.
- ADD PROCESSING FEE**
☒ Yes
- PROCESSING FEE DESCRIPTION**
 Payment Surcharge
- PROCESSING FEE FOR CARD TRANSACTIONS**
 3.9900
- PROCESSING FEE FOR ELECTRONIC TRANSFERS**
 1.2000
- When a processing Fee is charged, the system will auto generate a Debit Memo for the Fee amount. The Debit Memo will auto allocate to the Payment record. To determine the G/L allocation for the Fee, you must specify Class Codes per Company.

Company	Processing Fee Class Code for Card Payments	Processing Fee Class Code for Electronic Transfers
99		
Company 123 123		
Digital Inc 01	BANK BANK FEES FOR WIRES REC'D	SC13 SERVICE CHARGE CO13

- Add Processing Fee** - set this to "yes" to add a processing fee
- Processing Fee Description** - This is the description that the customer will see on receipts
- Processing fee for Card Transaction** - set the % amount that will be charged for card transactions (Payment Type = Credit/Debit Card in Payment processing window)
- Processing fee for Electronic Transfers** - set the % amount that will be charged for electronic transfers. (Payment Type = Electronic Transfer in Payment processing window)
- 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:

Analysis Setup Logout

PROCESS PAYMENT

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

Amount to Pay 5,000.00	Payment Type Credit/Debit Card
Processing Fee 199.50	Bank BANK AMERICA - NavPay: Payway Edgil
Total Charge 5,199.50	Card to Charge 411111*****1111 Edit New
Bill-To Client Underwater World Horsham	Description BANK AMERICA - NavPay: Payway Ed
	Card Type VISA
	Last Charged
	Card Status Active
	Card Number 411111*****1111
	CVV 123
	Expire Date 12 2025
	Card Holder Name Joe Smith
	Billing Address 495 Easton Rd HORSHAM, PA 19044 United States
	Telephone 2156724180
	Email newscycledemo@gmail.com

Process Payment Later Process Payment Now

Electronic Transfer window:

PROCESS PAYMENT



ATTENTION
 This client has authorized Pre-Payment via Credit Card.

Amount to Pay 42.15	Payment Type Electronic Transfer
Processing Fee 0.51	Deposit Bank FIRST UNION-- NavigaPay Auth.net
Total Charge 42.66	Cash on Account Optional: Select Cash on Account
Bill-To Client Round Guys Brewing Company	Payment / Check No.
	Payment from Bank
	Date on Payment / Check
	Deposit Date 9/19/2023
	Check Amount

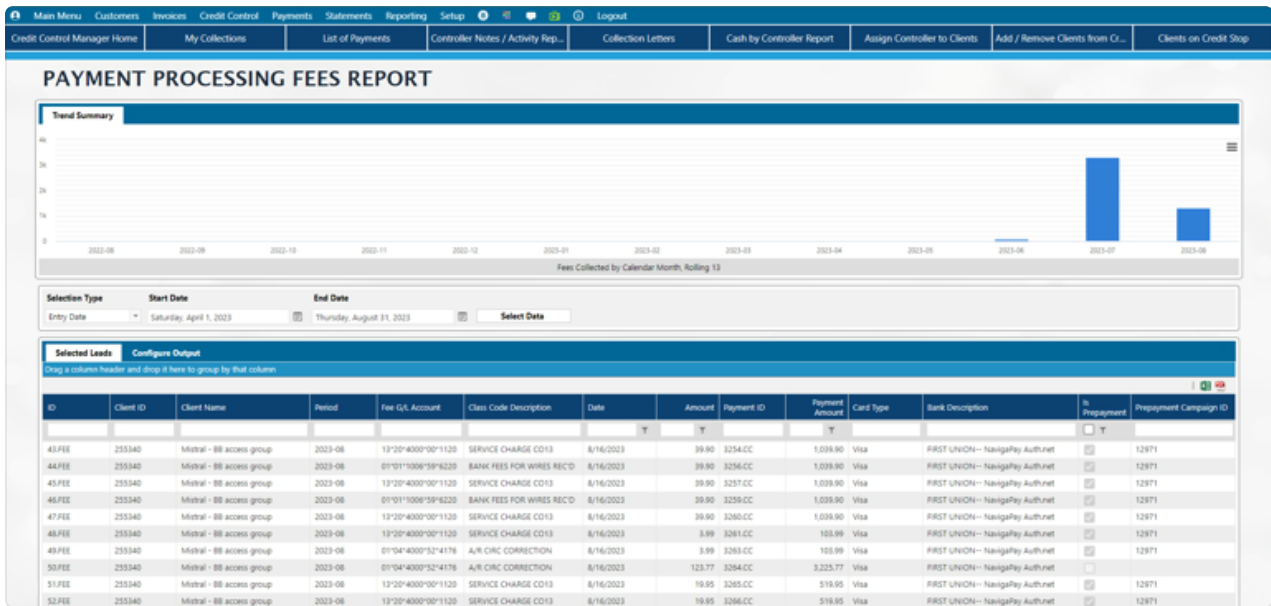
Process Payment Now

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.

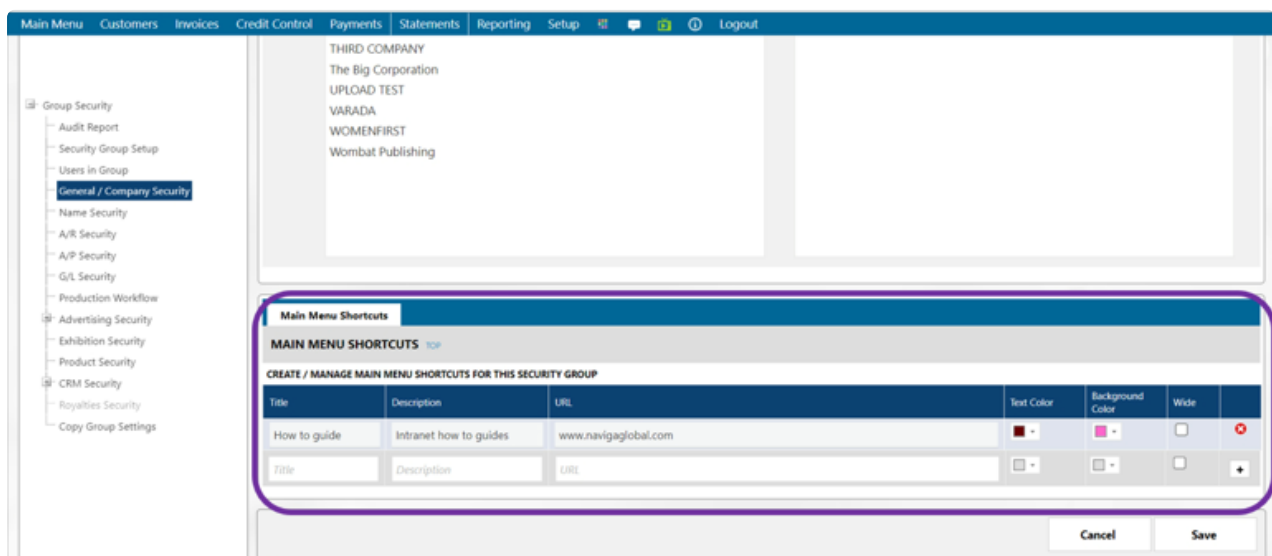
For prepayment values, there are also some new tags.

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

The screenshot shows the 'Main Menu' dashboard. The top navigation bar includes 'Main Menu', 'Customers', 'Invoices', 'Credit Control', 'Payments', and 'Statements'. The main content area is divided into two columns. The left column contains a list of shortcuts, with 'Group Default: Intranet how to guides' highlighted by a purple box. The right column contains a 'Security Settings' panel with a 'SECURITY GROUP SELECTION' section showing a tree structure with 'ROOT' and 'Top of the Tree!'.

Main Menu		Customers	Invoices	Credit Control	Payments	Statements
Go to Main Menu						
Search Menu System						
Advertising: Enter a New Campaign						
Custom Shortcut: Informer						
Exhibition: Exhibition Overview						
Group Default: Intranet how to guides						
Accounts Payable						
Accounts Receivable						
Advertising						
Credit Control						
CRM						
Exhibition						
General Ledger						
Newsstand Sales						
Production						
System Initialization						
System Settings						

Security Settings

SECURITY GROUP SELECTION

GROUP ID	DESCRIPTION
1	ROOT
2	Top of the Tree!

General Security

GENERAL SECURITY OPTIONS

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.