User Guide 2022.3

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User Guide 2022.3

Purpose

This document provides a step by step guide of how to use the new features in the 2022.3 release. The document is organized by module.

Advertising Module

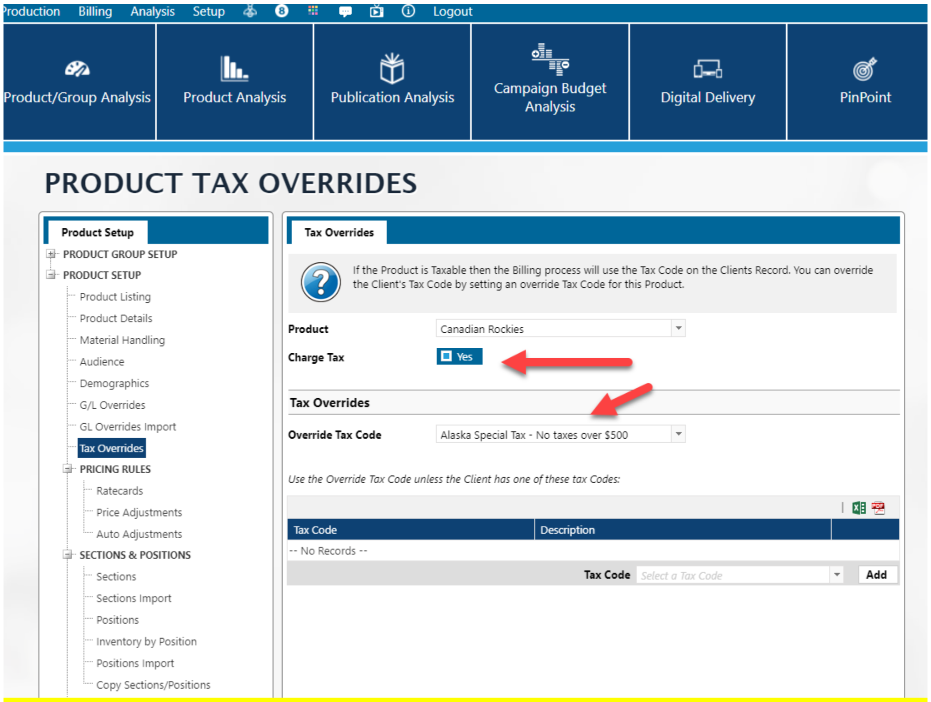
Tax Cap on Invoice

New field in the Tax Maintenance screen “Taxable Amount Cap” where user can enter a maximum amount of invoice to which a tax applies, and above which will not be taxed. This applies to states such as Alaska where a law defined invoice amount over a certain amount isn’t taxable. When user generates an invoice, the invoice will display the original tax amount and the actual tax amount.

Navigate to the menu Setup -> System Tables -> Tax Maintenance. Select the tax from the drop-down or create a new tax by clicking the New field.

Enter all related information and enter the maximum amount taxable on an invoice in the new field “Taxable Amount Cap”. For example, if you enter 500, then the system applies the tax amount to the invoice up to $500 and will not tax the remaining amount. Save the settings.

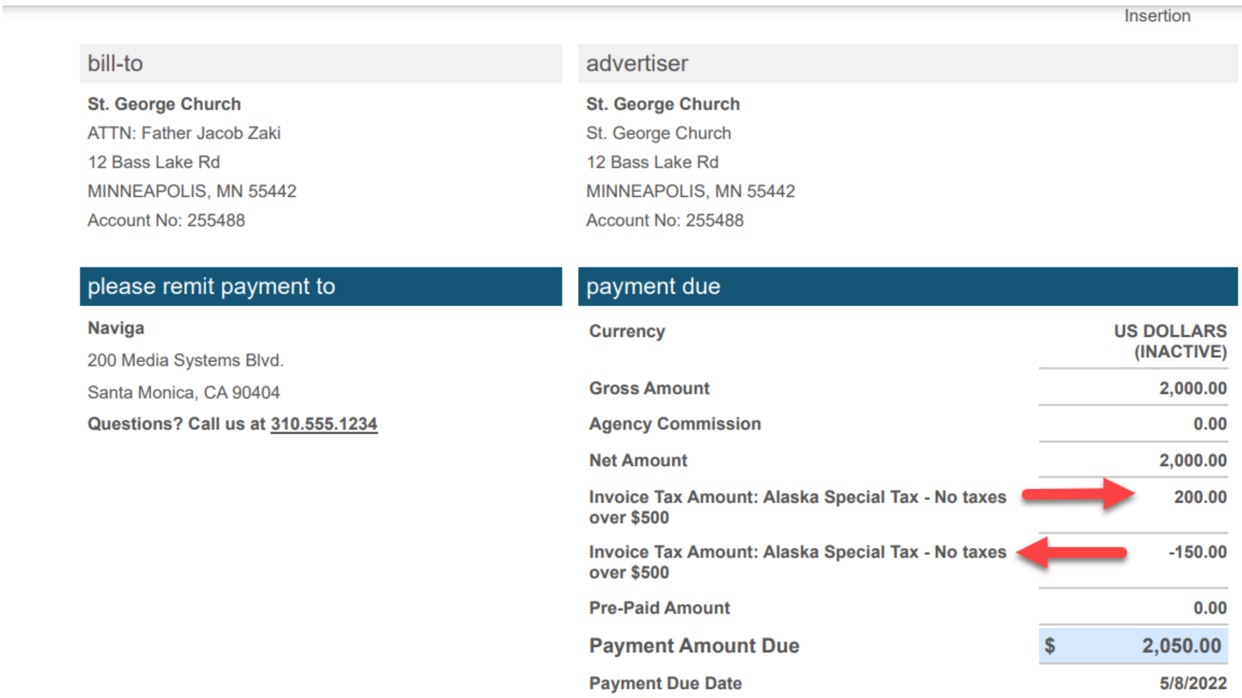
Create a new campaign using this tax. Typically, the tax is setup on the product in the menu Setup -> Product setup -> Tax Overrides node. Choose the tax you created above in the drop-down.



Save the settings.

Note that the campaign itself displays the full tax amount and the cap will only display on the invoice. The cap is per invoice, not per order, so that the campaign if containing multiple lines over the cap amount and the lines are billed separately, each invoice will display the cap for the amount invoiced at that time.

Bill the campaign and generate the PDF for the invoice.


Insertion

bill-to	advertiser
St. George Church	**St. George Church**
ATTN: Father Jacob Zaki	St. George Church
12 Bass Lake Rd	12 Bass Lake Rd
MINNEAPOLIS, MN 55442	MINNEAPOLIS, MN 55442
Account No: 255488	Account No: 255488

please remit payment to

Naviga
200 Media Systems Blvd.
Santa Monica, CA 90404
Questions? Call us at 310.555.1234

payment due

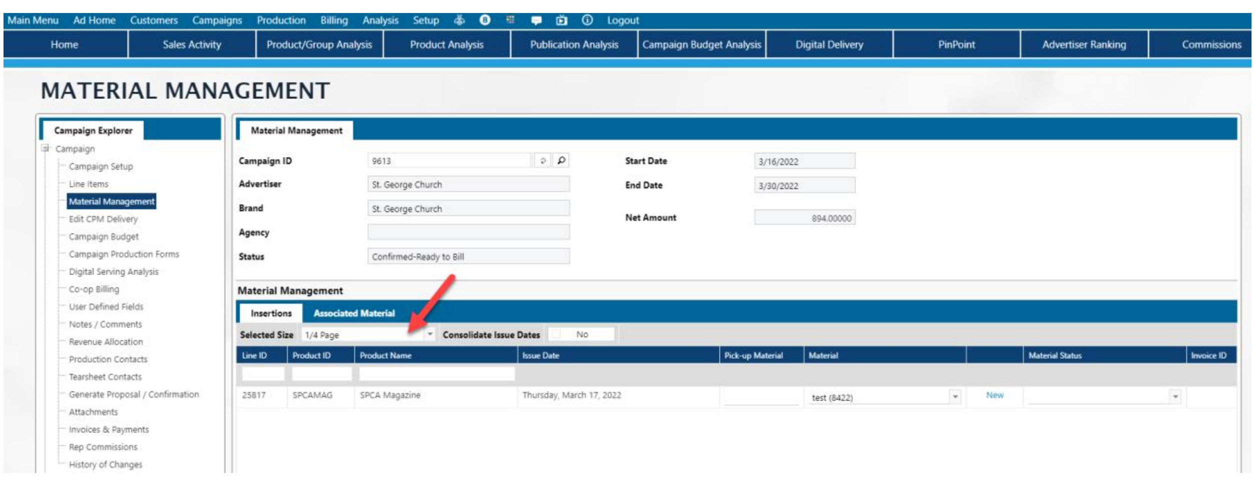
Currency	**US DOLLARS (INACTIVE)**
Gross Amount	**2,000.00**
Agency Commission	**0.00**
Net Amount	**2,000.00**
Invoice Tax Amount: Alaska Special Tax - No taxes over $500	**200.00**
Invoice Tax Amount: Alaska Special Tax - No taxes over $500	**-150.00**
Pre-Paid Amount	**0.00**
Payment Amount Due	**$ 2,050.00**
Payment Due Date	**5/8/2022**

The system calculates the full amount of tax on the invoice according to the tax setup but then calculates the tax based on the taxable cap amount.

Material Management on Campaigns

New node for Material Management on campaign entry to allow user to promptly manage existing material and add new as needed.

Create a new campaign or edit an existing one with multiple line items which have associated material records. Note the node on the campaign header "Material Management". Click the node.

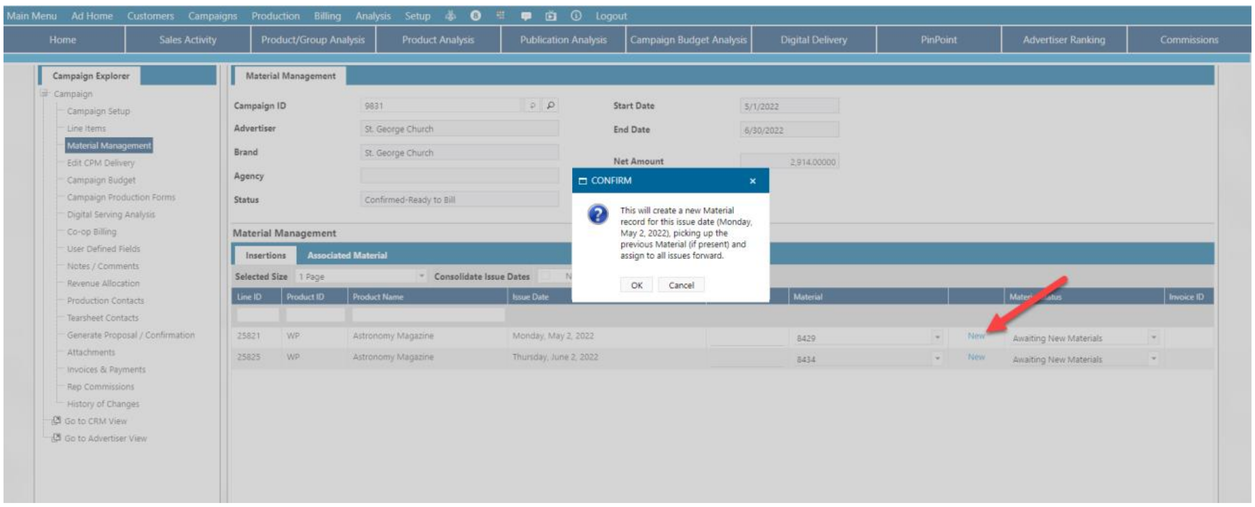


The system displays the material associated with a selected size. If you choose a different material size from the “Selected Size” drop-down, then the screen toggles to display the material associated with that line item.

You can also enter the Material Status in the drop-down if the product has material stages setup prior. You can also enter a pickup material number in that field.

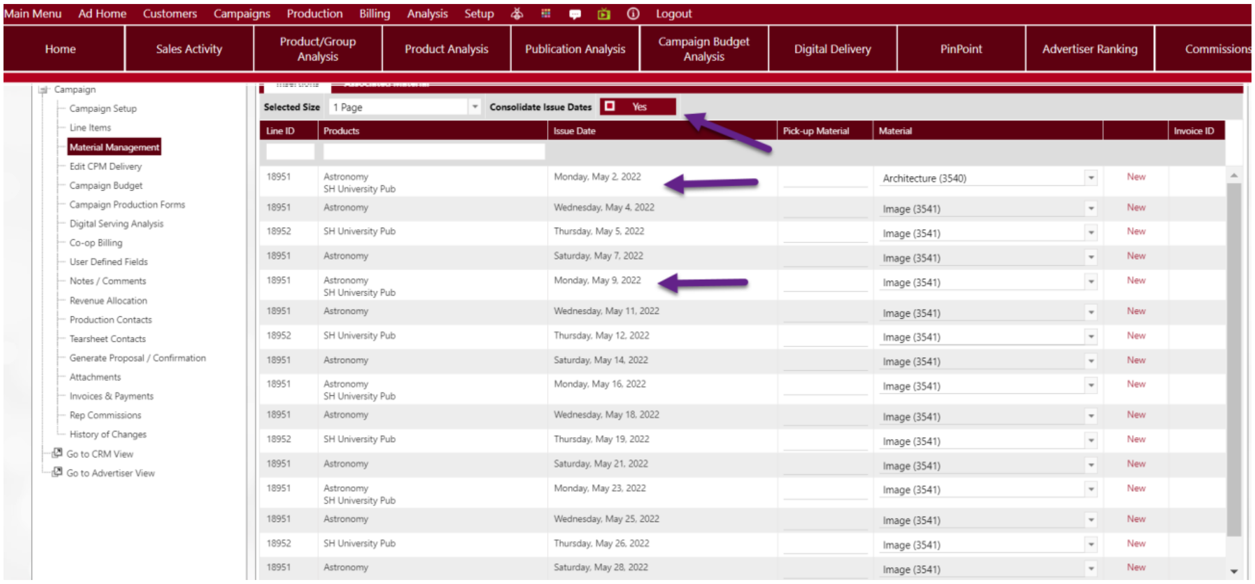
Click the node “Associated Material” to view all material records on the campaign and you can click Edit to change them.

Click the link “New” button. A message displays to warn you that this will create a new Material record for this issue date of that line item, picking up the previous Material if one exists and assigning it to all issues forward.



Note the Material IDs are added to the line. If you click the Materials tab on each line item, you can see the newly created materials.

If you have multiple products sharing the same issue date, and you’d like to see them combined, then click “Consolidate Issue Dates”.

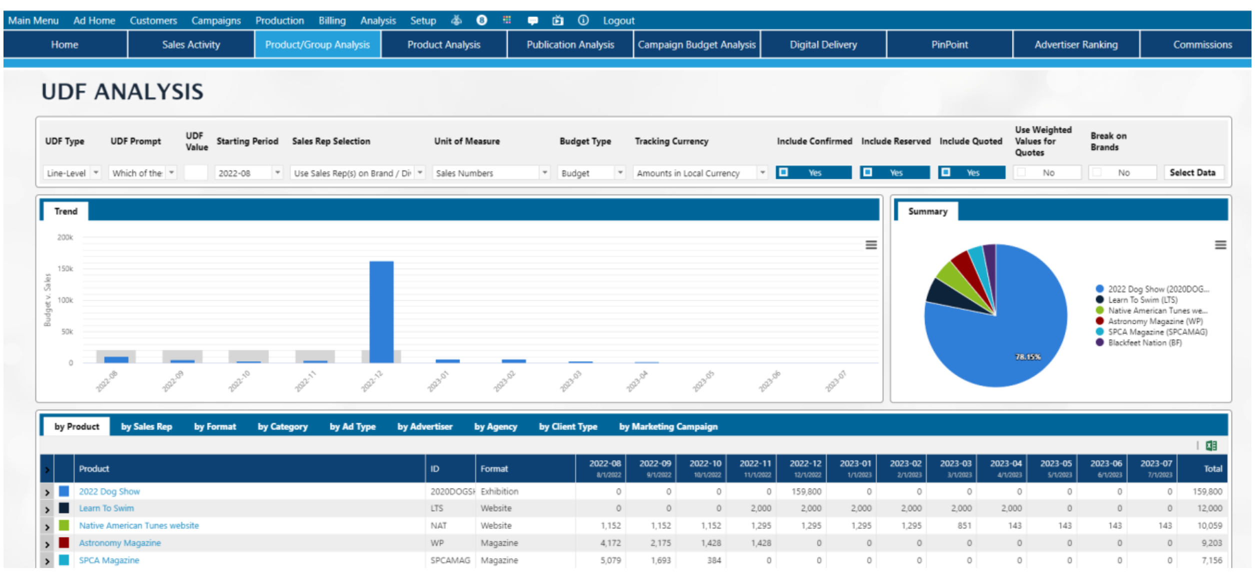


The remaining issues that don’t share a date will be displayed separately.

Campaign UDF Analysis Report

New report “Campaign Analysis by UDF” is available to provide details of sales by rep and by Campaign or Line User Defined Fields.

Navigate to the menu Analysis -> Campaign Analysis by UDF.



Enter the UDF Type from the drop-down menu to be either Campaign UDF or Line Item UDF. You can as an option enter the value in the IDF Prompt field from the campaign or line item you are searching for or leave blank to return all data. Then enter the Starting Period field. This field provides data for a year starting with this period.

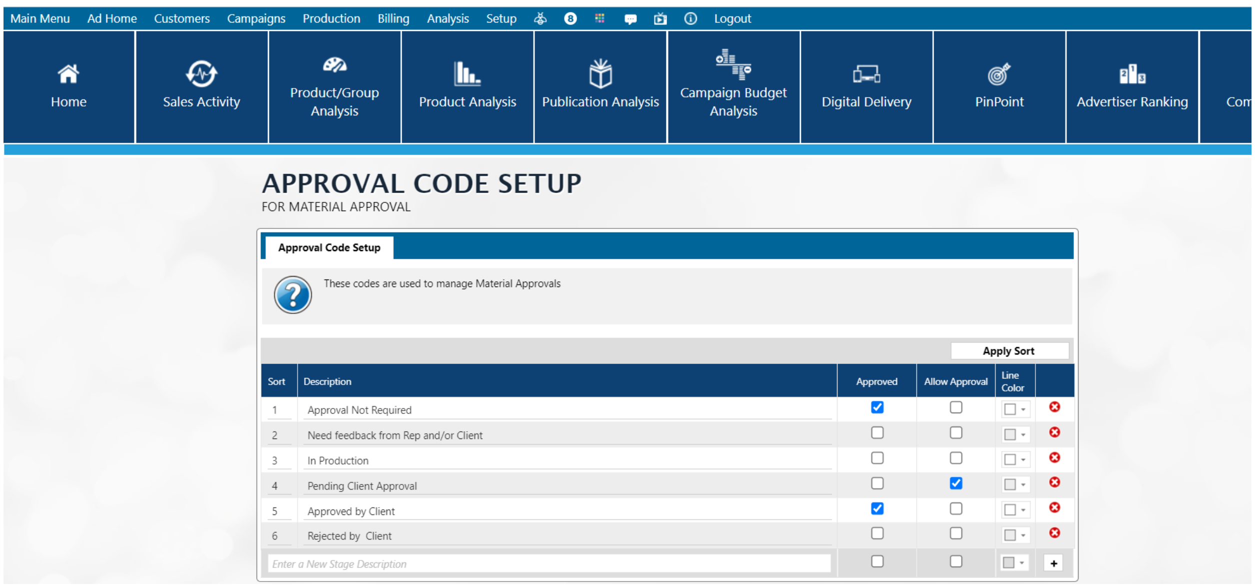
You can also limit the search by Salesrep. Enter the unit of Measure being Sales, Budget or Sales vs. Budget. You can also choose the Budget Type being Budget or Forecast numbers. Check the order statuses which you are interested in to view. You can break the results by brand where the data displays the Advertiser*Brand. Select Data to view the results.

The data displays by various groups, such as Advertiser, Product, Format of the Product, Ad Type, Client Type or Marketing Campaign. The data displays in graphic and numeric format.

Artwork and Material Status

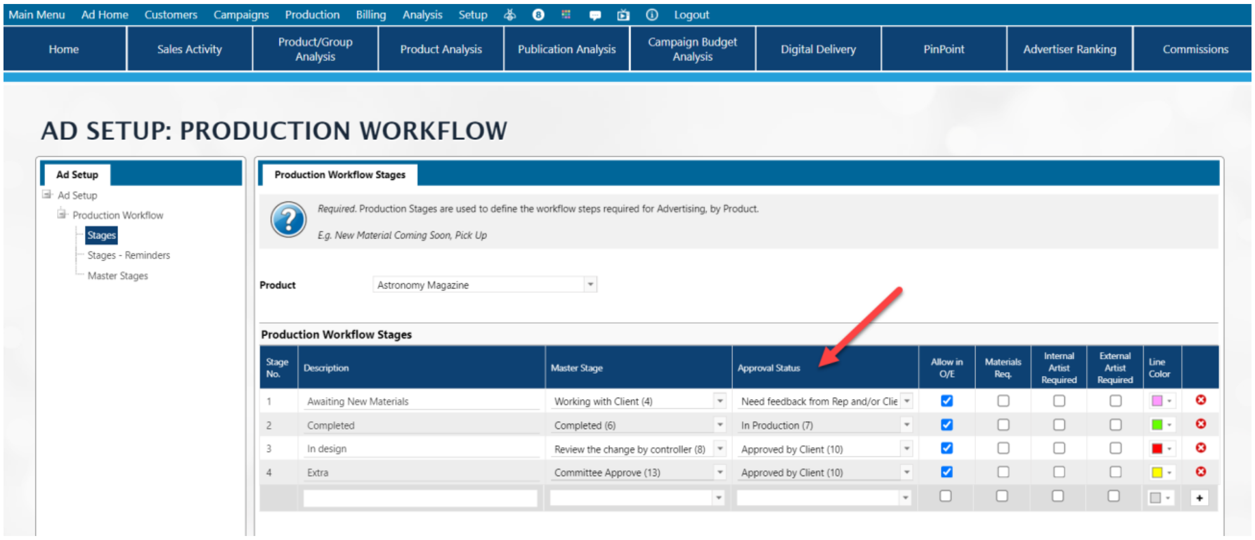
New field in the Production Workflow Setup screen creates an automatic link between the Production Status and the Material Artwork Approval Status so that in order entry, when a material stage is set it is automatically tied with the Artwork Approval Status and if the interface Naviga Plan is enabled, it can flow into Plan with the correct status on both Naviga AD and Naviga Plan.

Navigate to the menu Setup -> Material Approval Setup.



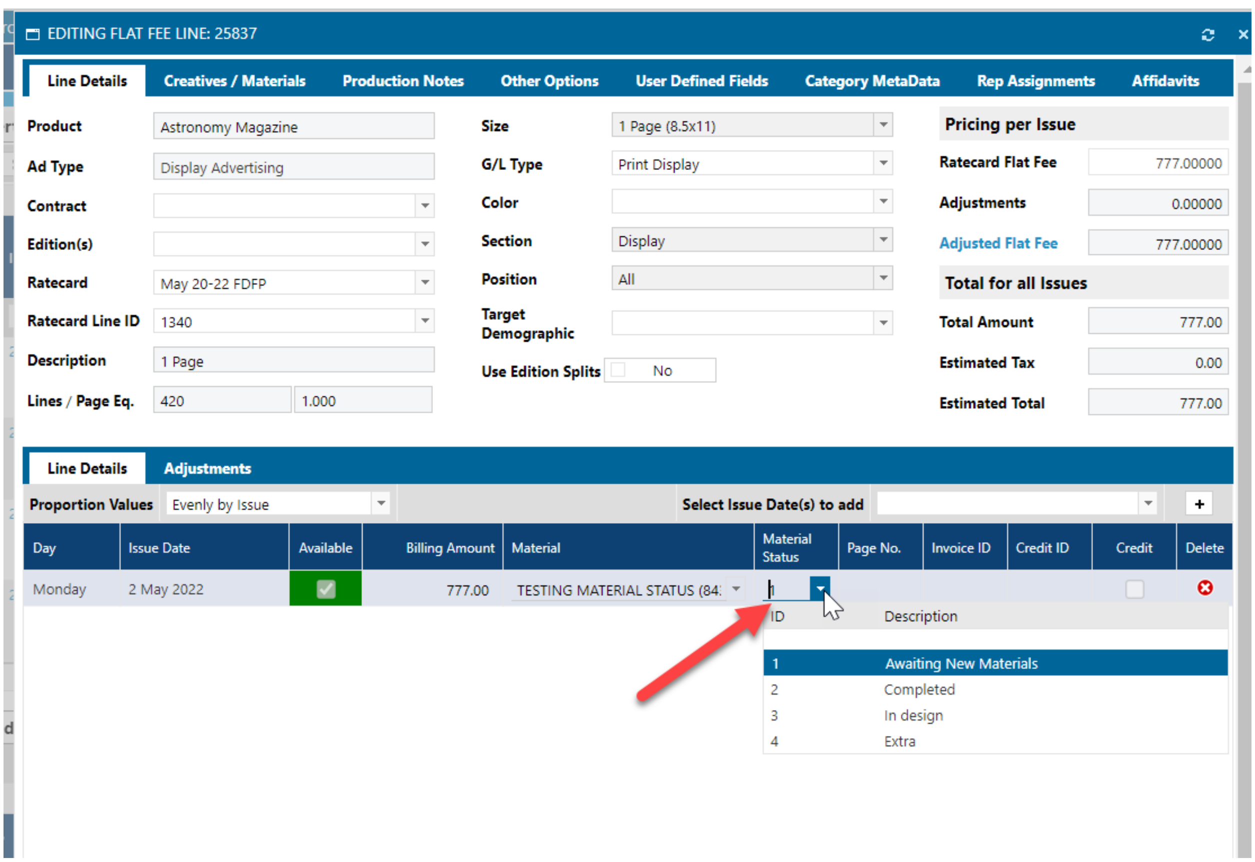
Add the ID, and description of the approval status and check the appropriate flags, such as Approved, Allow Approval and color. Save the settings.

Navigate to the menu Setup -> Production Workflow Setup. Enter the description in the blank box or edit an existing status. Choose the Master Stage from the drop-down menu.



Choose a corresponding Approval Status from the drop-down menu. These are the option in the step above. Check the appropriate flags such as the Allow in Order Entry or colors and so forth. Save the settings.

Navigate to create a new campaign or edit an existing line item and choose the material status in the line entry.



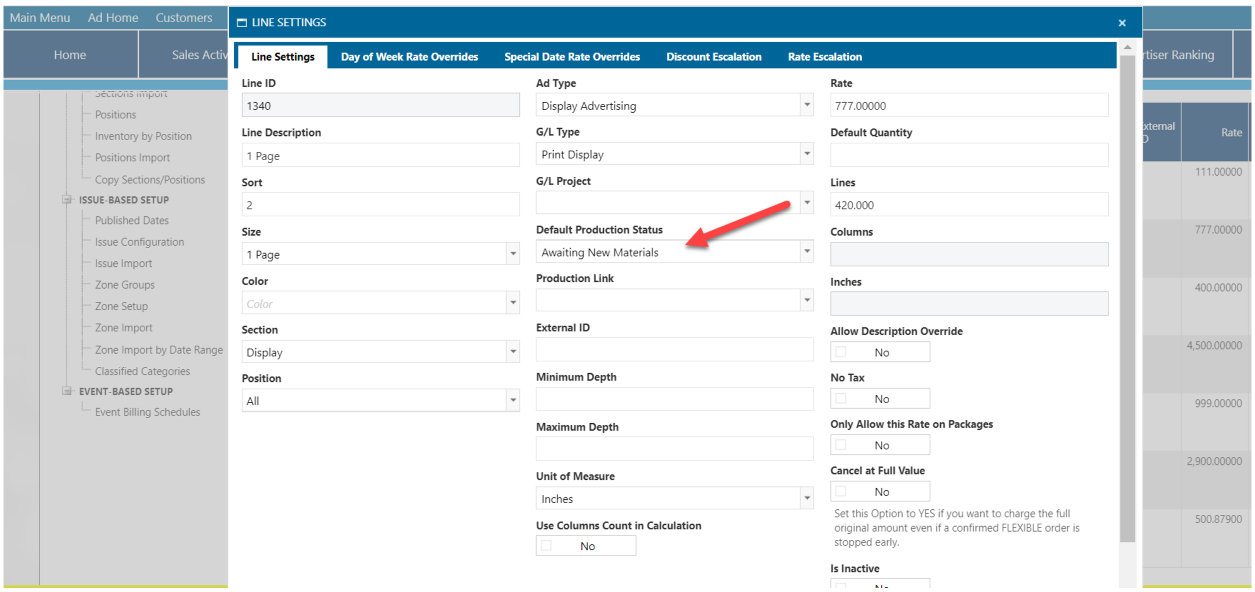
Save the line. You can view the various Material statuses for the lines in the menu Production -> Production by Product.

Production Status on Ratecard Line

Default Production Status giving the material default status is now available on the Ratecard Line as an option for Print Ratecards.

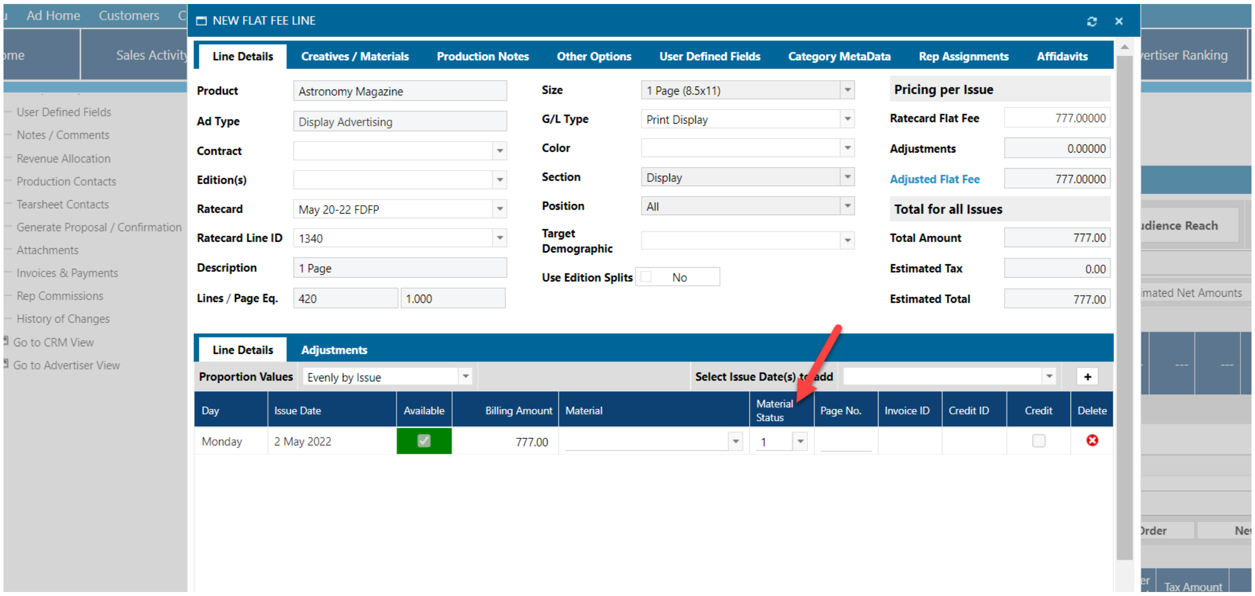
Navigate to the menu Setup -> Product Setup -> Ratecard Setup.

Search for the print publication and Ratecard. Create a new Ratecard Line or edit an existing one.



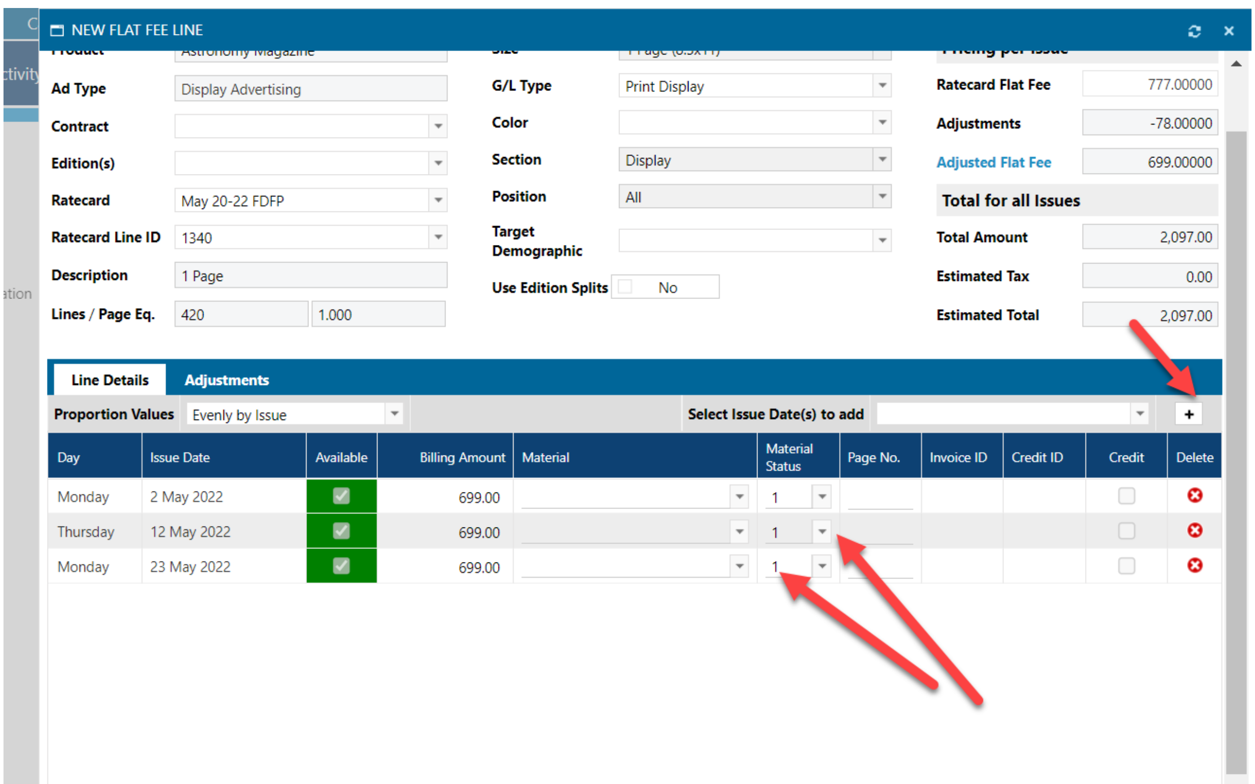
Choose the value of the Default Production Status from the drop-down menu. Save the settings. These values come from the menu Setup -> Production Workflow Setup.

Create a campaign line item for this product and Ratecard line.



Note that the Material Status value is defaulted in the line.

Add more issues to this line from the "Select Issue" field and click the + sign.

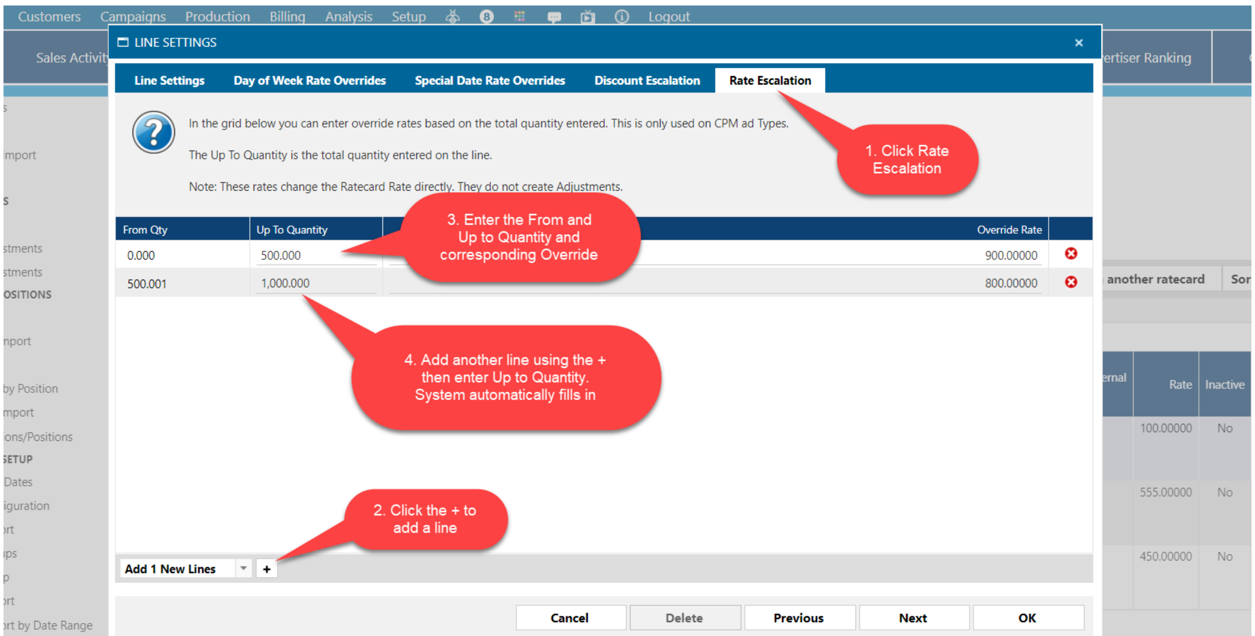


The added issues carry the same value of the Material Status.

CPM Frequency Discounts

Rate Escalation feature on Ratecards allows for discounts to be applied to Ad Types of Cost Per type for print and digital products by default in a line item. This allows for example Inserts to use the escalation discounts so that when a publication distributes thousands of inserts the advertiser can benefit from a discount based on the number of inserts automatically applied to the order when it's created.

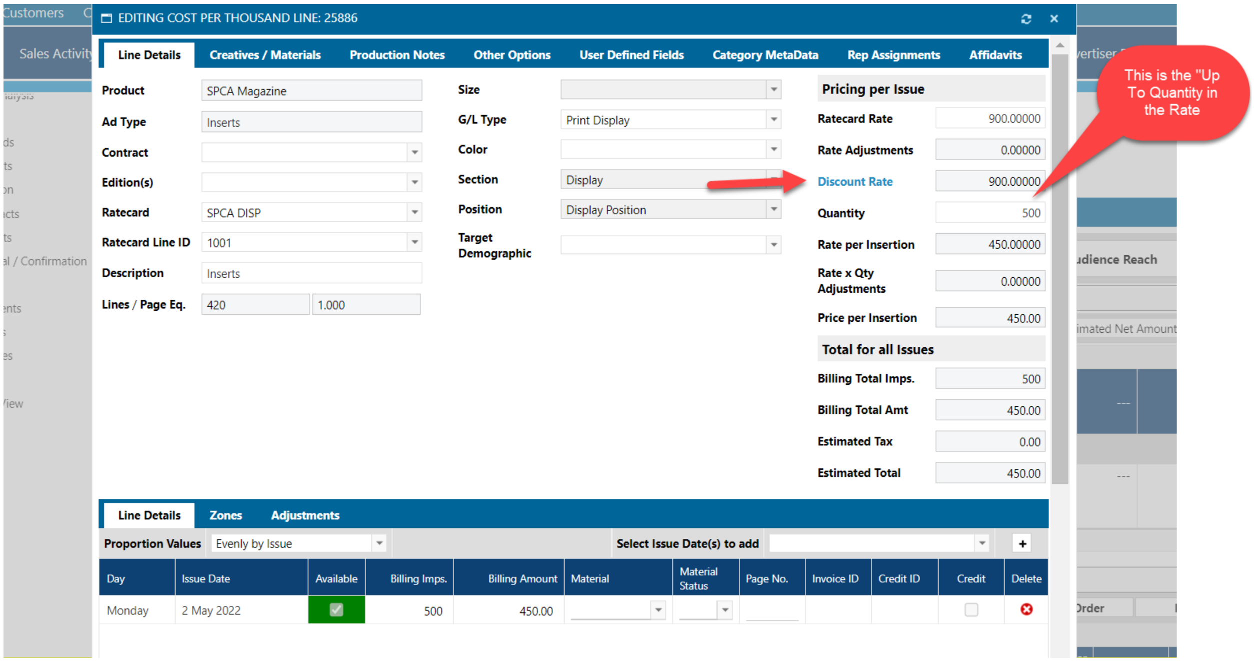
Navigate to the menu Setup -> Product Setup -> Ratecards. Choose a print product from the drop-down menu. Enter an Insert AD line on a Ratecard using an AD Type CPM.



Click the + sign to add a new line. Enter the "Up to Quantity" field and corresponding Override Rate. This is the value which if entered as Qty on line item, will trigger the override Rate which is different than the Line Rate for this CPM Ad Type.

Click the + if you'd like to add another up to quantity and the system automatically increments the From Qty from the previous line. Enter the corresponding override rate. Click OK and save the Ratecard.

Enter a campaign and line item using this Ratecard, Ad Type and Up to Quantity.



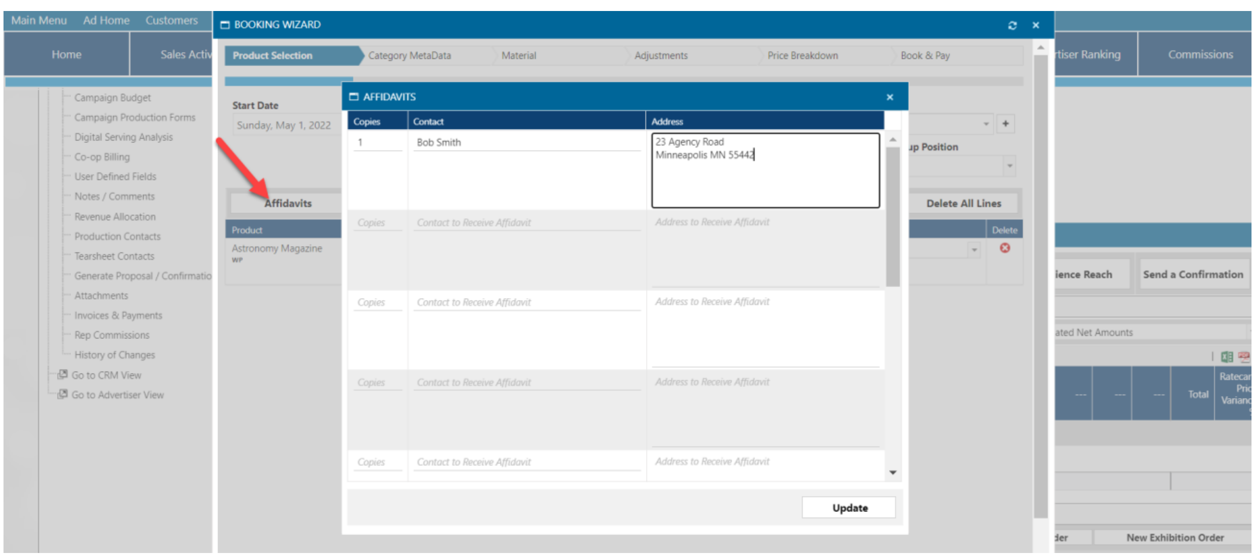
The Discount Rate kicks in automatically and doesn't show as an adjustment.

Repeat the process for a digital product of CPM Ad Type.

Booking Wizard Affidavit

Booking Wizard allows for Affidavit entry in the line item.

Navigate to create a full line entry campaign line item. Choose any of the three wizard options.



Click the Affidavits button and enter the details of the affidavit in the pop-up screen and click Update.

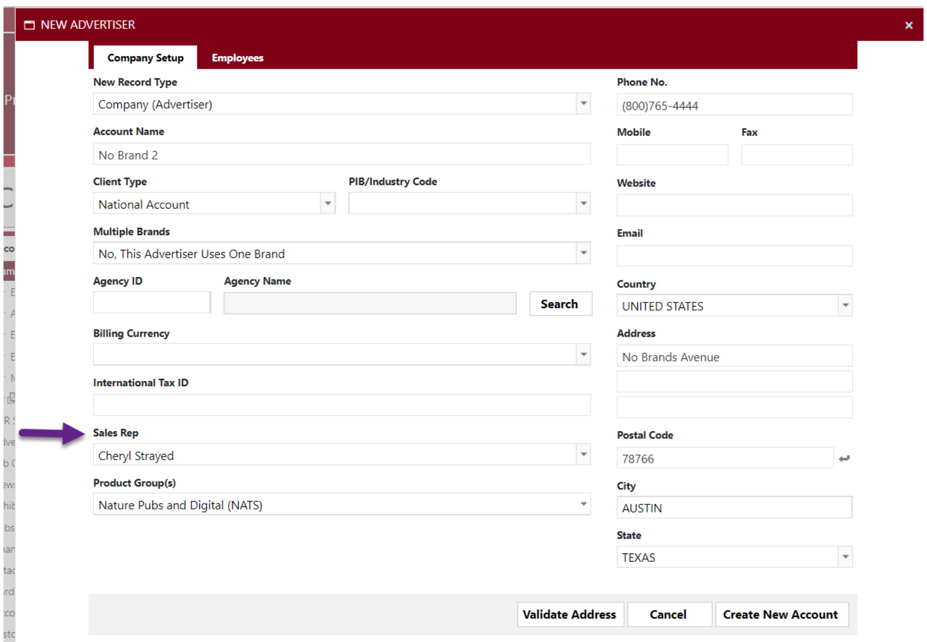
The Affidavit is saved on that line.

AD Header Flag of Do Not Use Multiple Brands

The flag on Ad System Header for new clients, “Set New Advertisers to Not Use Brands”, when set to “Yes” regarding New Advertisers using multiple brands, will be used in conjunction with the Advertiser setting of Not Use Multiple Brands. This allows the system in advertiser entry to prompt user to enter a Salesrep choice.

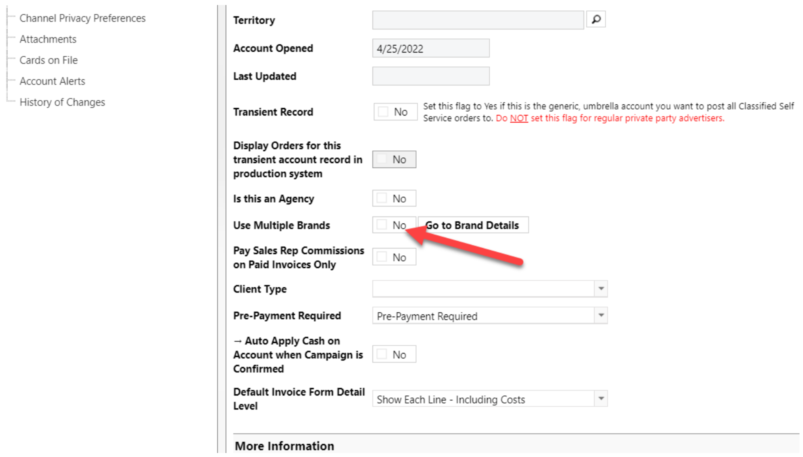
Navigate to the menu Setup -> Advertising Setup -> System Parameters. Check the flag for the option “Set New Advertisers to Not Use Brands” to “Yes”. Save the settings.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance and click the + to create a new advertiser.



Leave the option of “Multiple Brands” to be “No, This Advertiser Uses One Brand”. Click “Create New Account.”

Once the advertiser is saved and you click the node “Advertising Setup”, note that the option “Use Multiple Brands” is set to “No”.



Navigate to create a new campaign using this advertiser. Once you enter the advertiser, the Brand and Salesrep are chosen automatically.

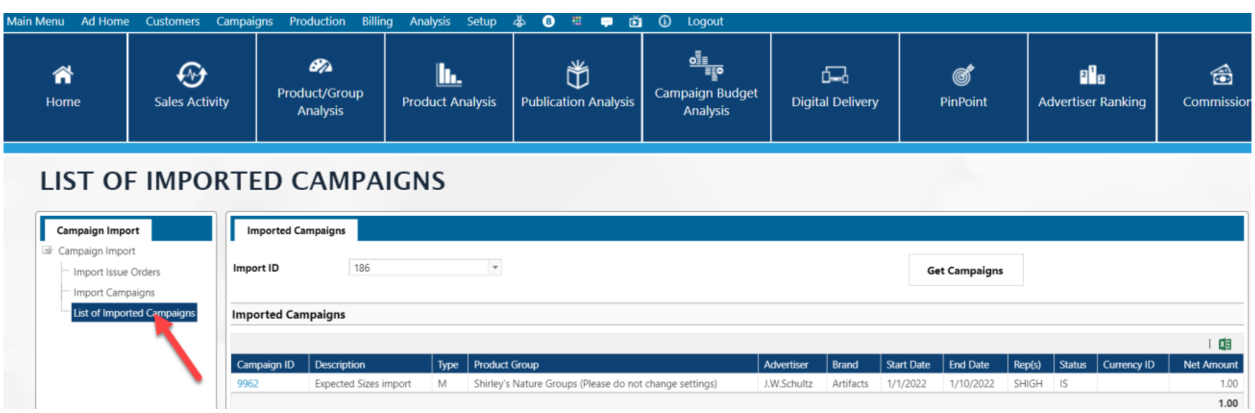
Expected Size on Imported Campaign

Campaign History import of a digital campaign for a product connected to AD Server, when including the size in the import template, the size appears under the Expected Size tab on the line item.

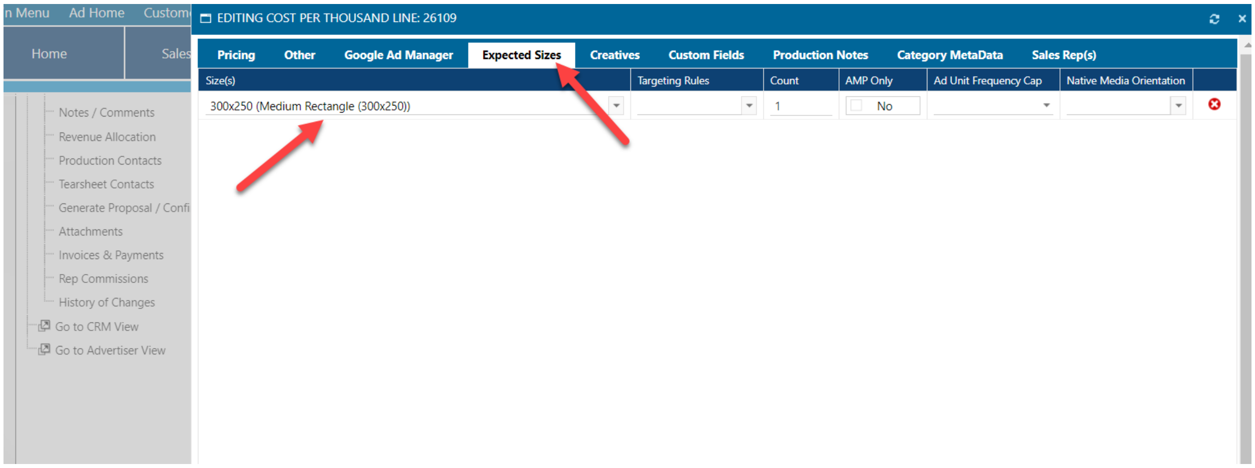
Navigate to the menu Setup -> Admin -> Campaign Import. In the node “Import Campaigns” download the import template and fill out the details.

The product you choose is a digital AD Server product. Enter the Size field in the template. Save the template and import the template.

Search for the import in the node “List of Imported Campaigns”.



Click the hyperlink to the campaign ID and open the line item.

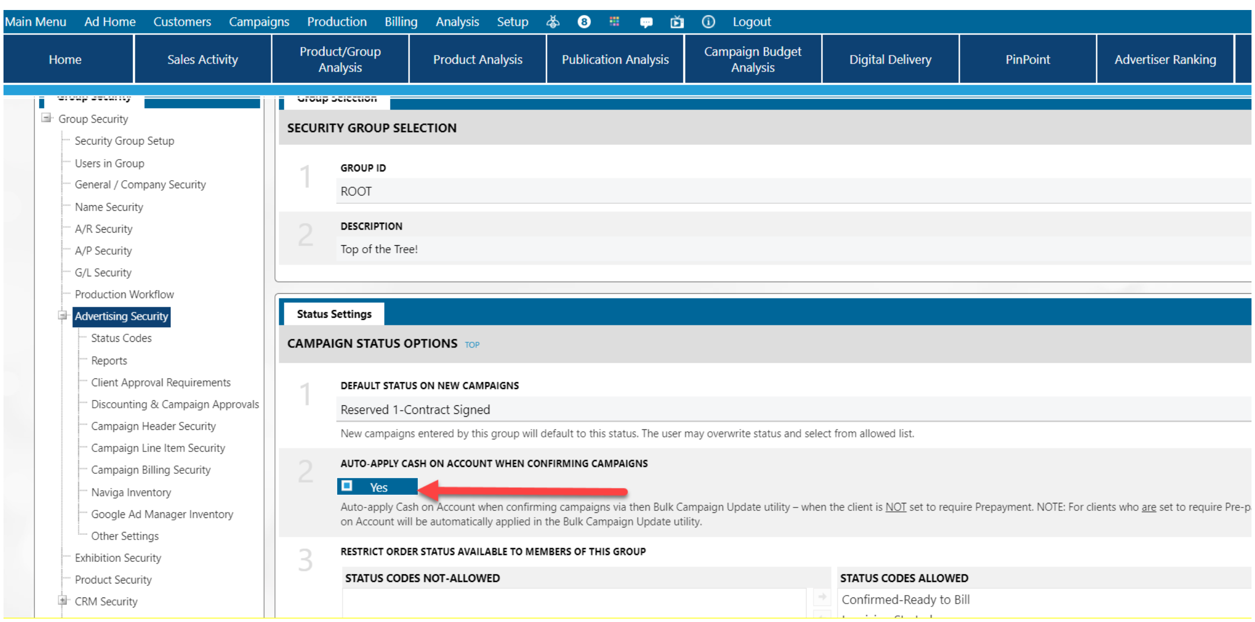


The “Expected Sizes” tab now includes the size you imported in the template.

Auto Apply COA on Advertiser Import

Added Auto Apply COA field to the Advertiser Agency Import template. This determines whether the campaigns for this imported advertiser when confirmed will allow for a payment from Cash on Account for that client.

For this option to work automatically for this advertiser, you must set the Group security to apply COA on confirming a campaign. Navigate to the menu Setup -> Admin -> Group Security -> Advertising Security.

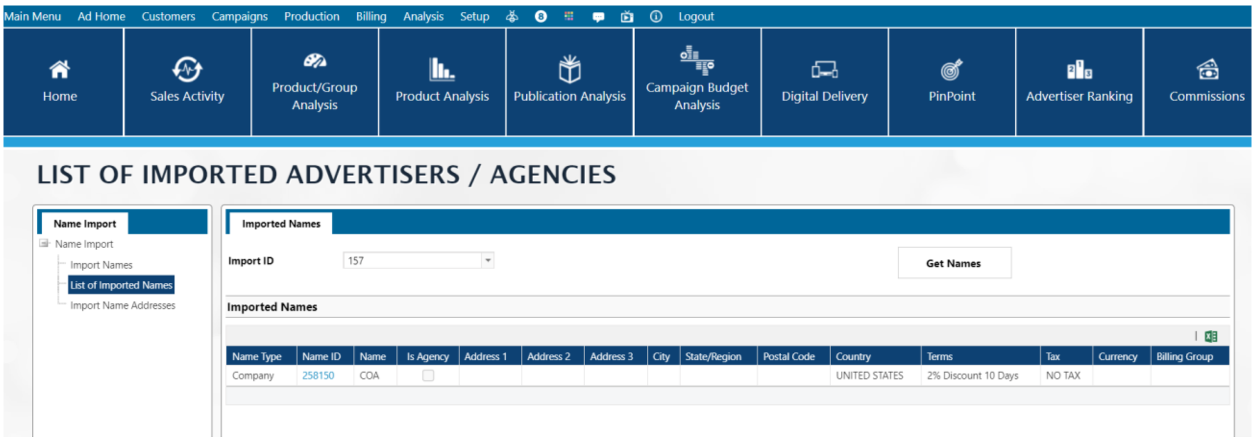


Scroll to the Status Settings section and check the flag for “Auto Apply Cash on Account When Confirming Campaigns”. Save the settings using the save button.

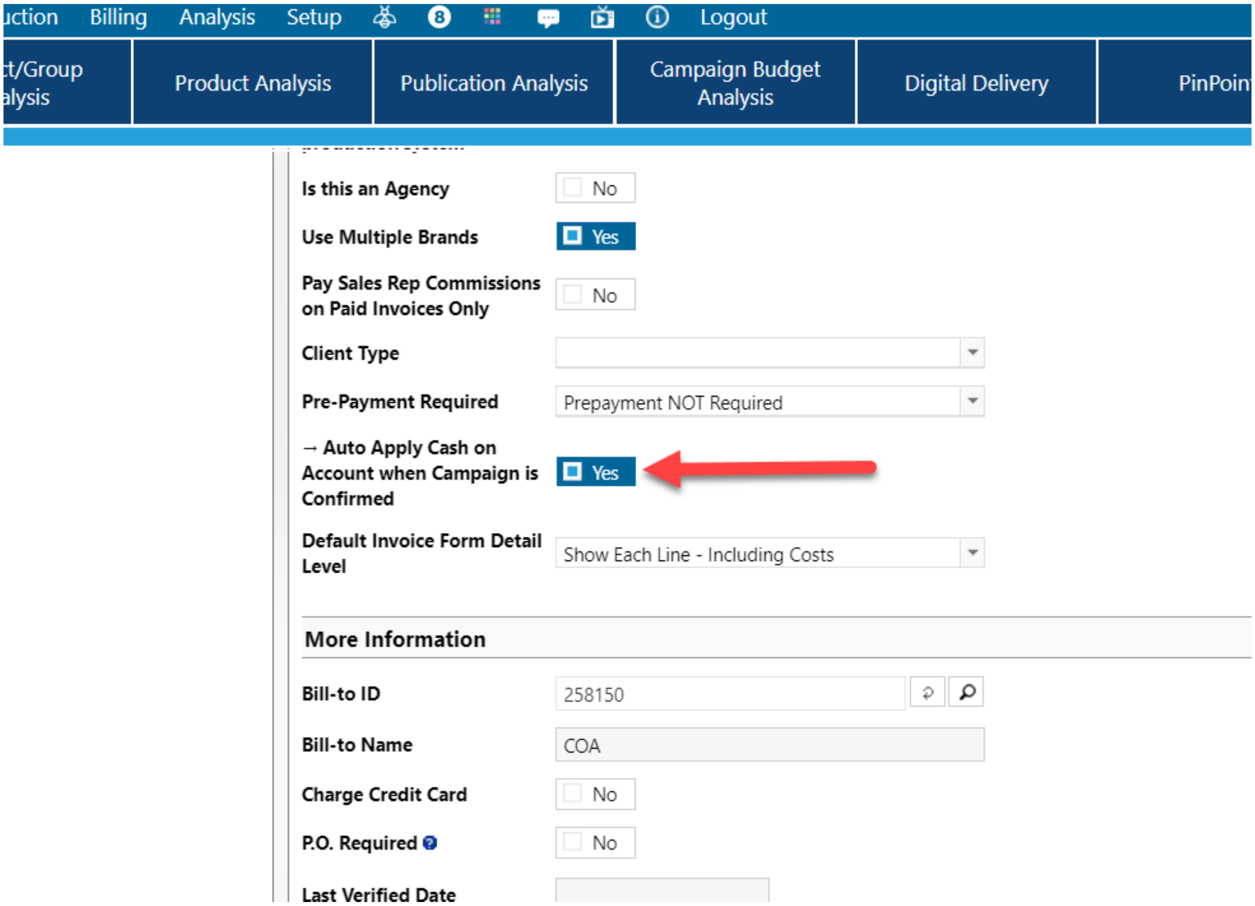
Navigate to the menu Setup -> Admin -> Advertiser Agency Import. Download the template and fill out all the fields according to the Advertiser Agency Import Quick Reference Guide. Note the field "Auto Apply COA". Enter Y in the field to indicate Yes to enforcing COA on confirming a campaign if COA is available.

Save the template and complete the import.

Search for the Advertiser you just imported in the "List of Imported Names" node.

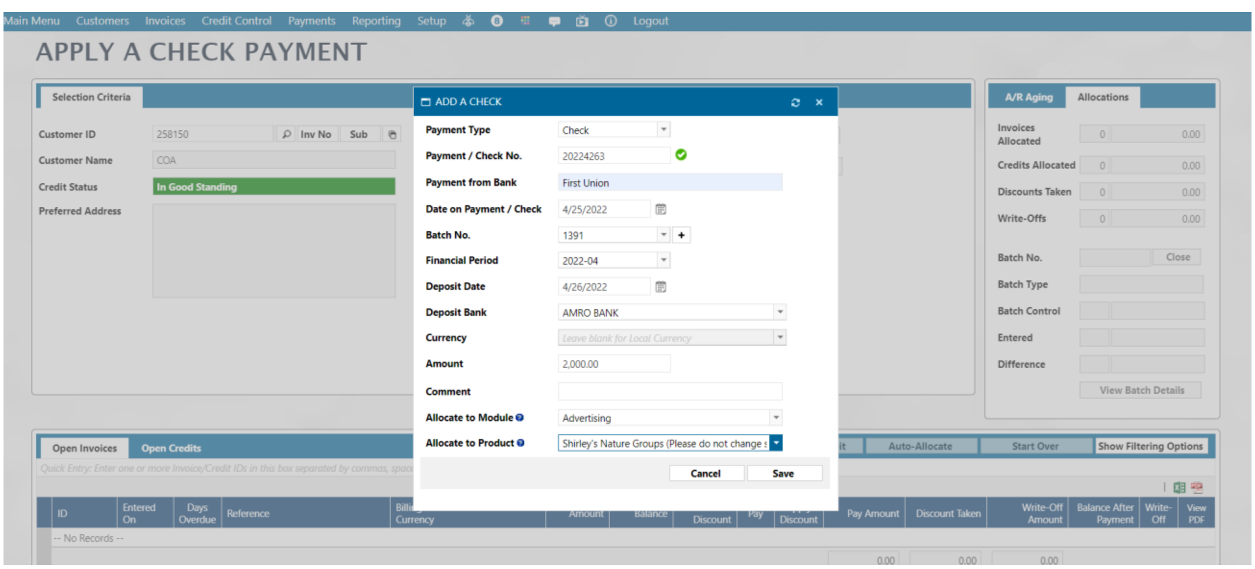


Click the hyperlink to the advertiser ID and then click the node "Advertising Setup".

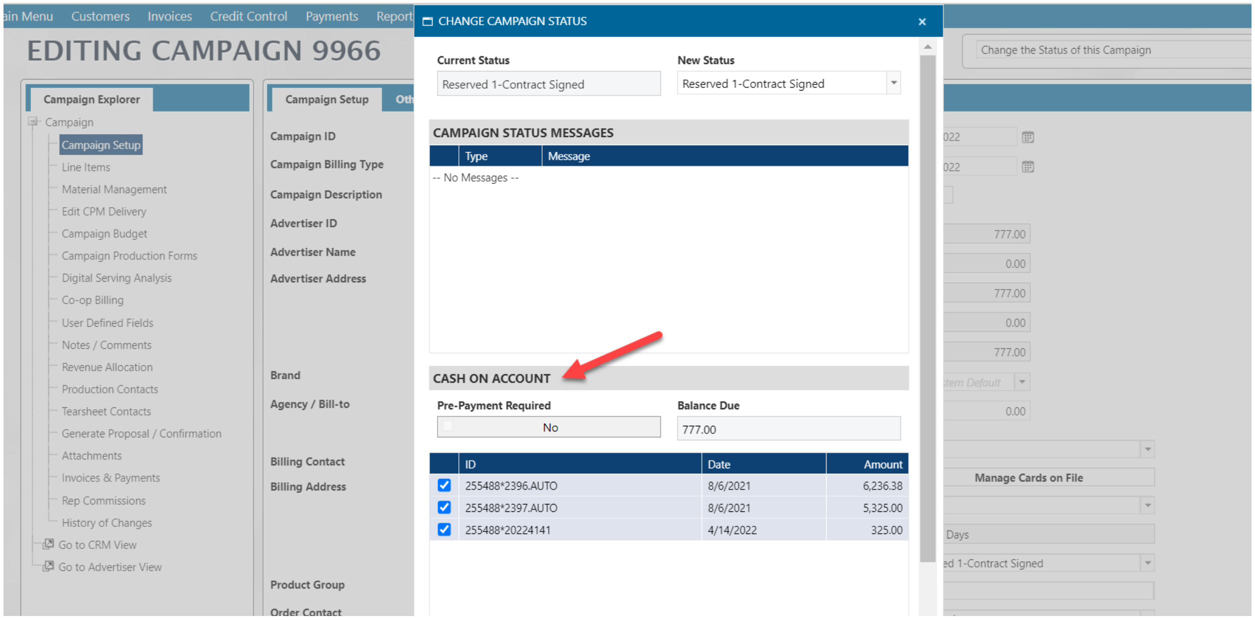


Note the field “Auto Apply Cash on Account when Campaign is Confirmed” is checked to “Yes”.

Enter COA for this advertiser from the AR module Payment screen.



Create another campaign for this advertiser and confirm the campaign.

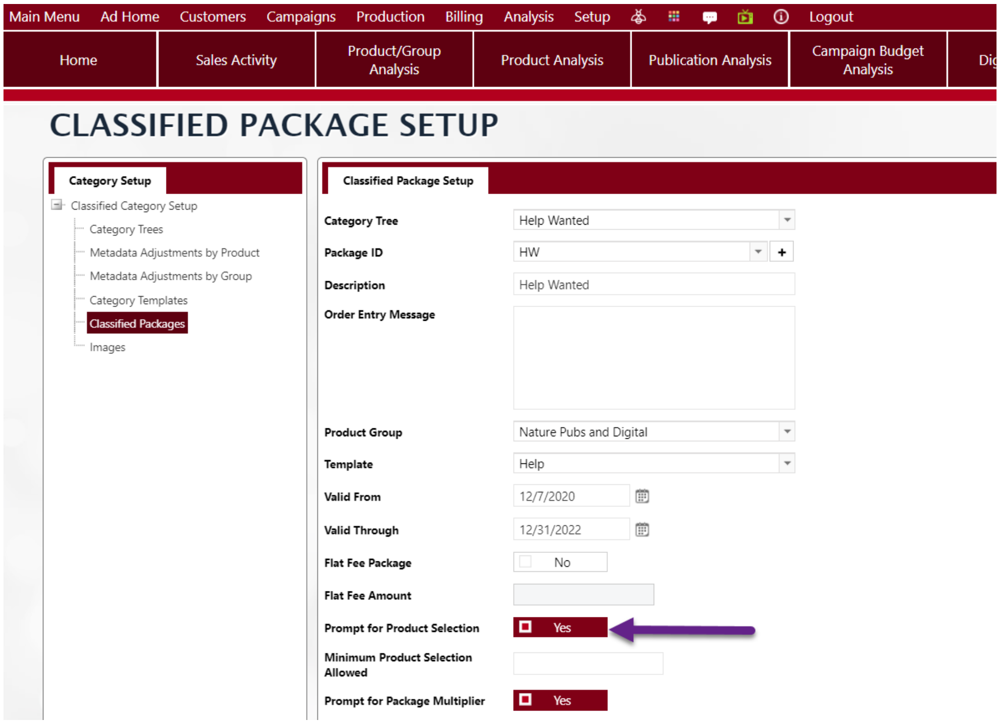


Note that the system lists the COA available for this customer and you can apply it with the campaign confirmation.

Toggle Select on Package Entry

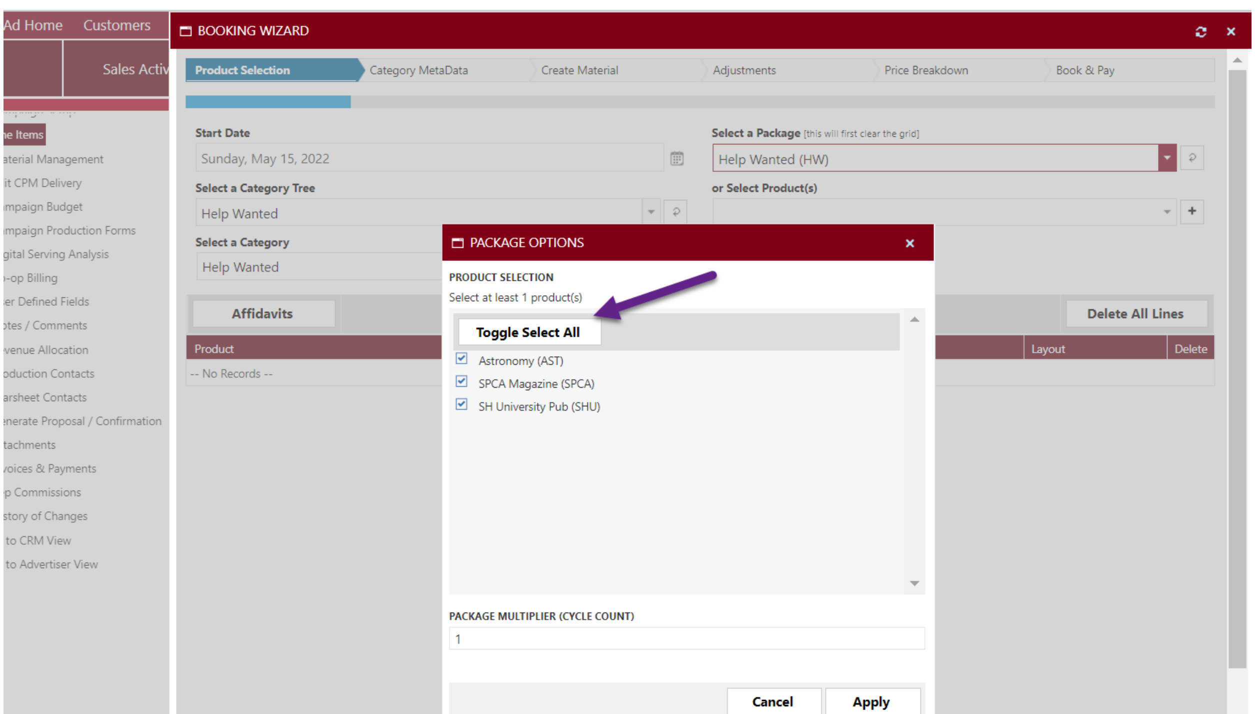
When booking a package with the Booking Wizard using the template option, and the package is setup for prompting for products, the system provides a new button “Toggle Select” to select all or unselect all products in the package. Note that the products appear all checked in the pop-up window so user can uncheck any one of them as applicable. If package is not setup to prompt entry user to choose a product, the screen displaying these products will not display and will proceed to prompt for multiplier if setup or only the lines with the products listed.

Navigate to the menu Setup -> Classified Order setup -> Classified Package Setup. Choose the Category Tree and Package. This package should have multiple products to be selected.



Check the flag "Prompt for Product Selection" to be "Yes". Save the package.

Navigate to create a campaign and line item using the "Booking Wizard" option 1. Enter the Category Tree and Category from the drop-down menus.



Note that all products in this package are pre-selected.

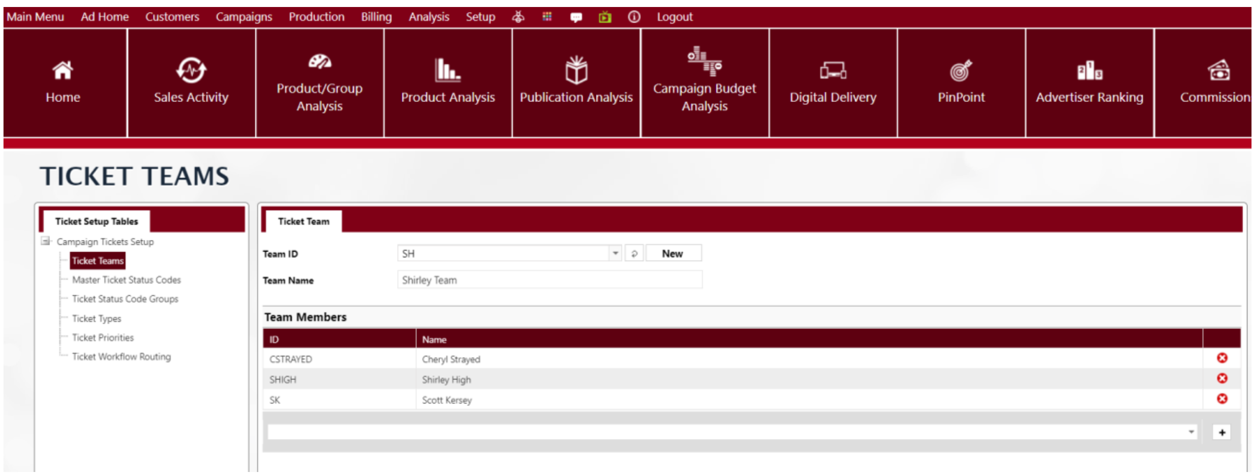
Note the “Toggle Select All” button which when clicked unchecks all the products and then you can manually check the products you’d like to include in the order.

If the package isn’t setup for a prompt to select products, then this screen will not display. You will be prompted for multiplier if setup on the package or just the lines listed on the line item.

Tickets Group Workflow

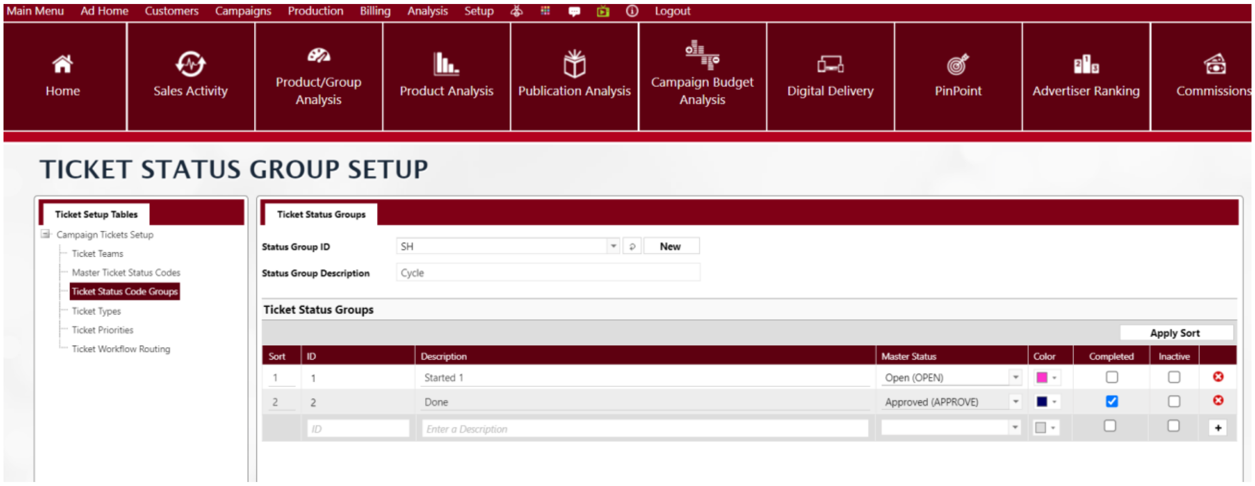
Tickets Workflow has been expanded to create a group/ team to which the ticket can be routed. It allows a user to belong to only one team. Many groups can then be assigned to ticket types and status as needed. For example, a financial group can handle financial issues on a campaign, or a production group can be assigned tickets to handle some aspects of a campaign and so forth.

Navigate to the menu Setup -> Advertising Setup -> Ticket Type Setup.



Click the “New” to create a Ticket Team. Enter the Team Name and add a member from the drop-down menu and click +. Add as many users as needed to the group. Note that once a user is added to one group, this same user cannot be added to another group. These groups can be specialized in functions, for example operations team versus financial teams vs. production teams and so forth. Save the teams.

Click the node “Ticket Status Code Groups”. As a prerequisite, the Master Codes can be created in the system, to indicate the status of a ticket. For example, New, Open, Under Review, Completed and so forth.



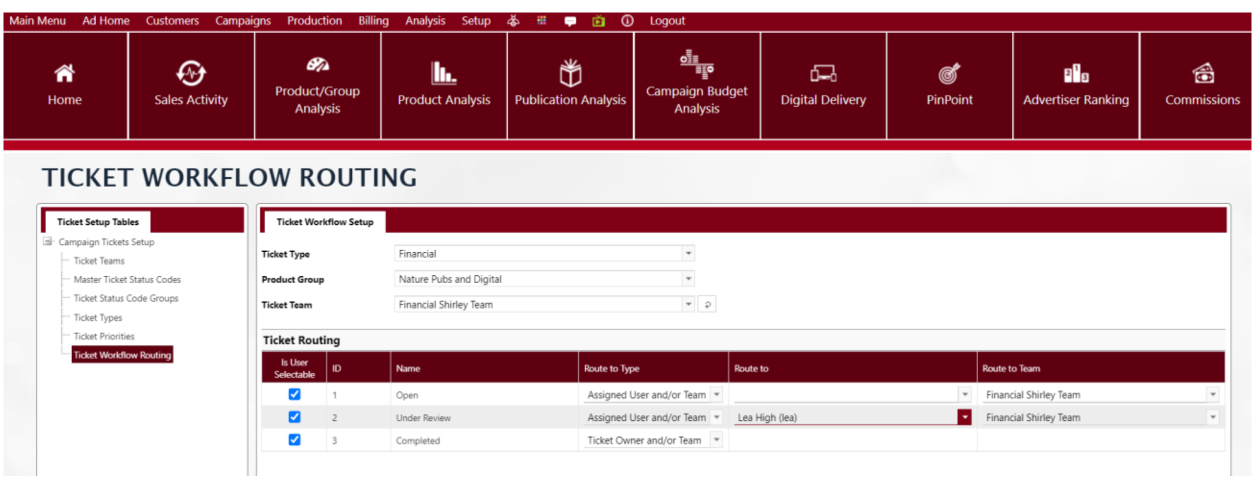
Click the New button to create a new Ticket Status Group. Enter an ID and Description for the group.

Enter an ID, description and choose a Master Status from the drop-down. Add as many status lines as needed and mark “Completed” and color code as needed. These statuses are then display in the Ticket Dashboard for reporting purposes. Save the settings.

Click “Ticket Type” node on the tree. This is to create a type of ticket that would be matched with a Ticket Status Code Group from the above node. Enter an ID, description and select a Status Code Group from the drop-down menu. Create as many ticket types as needed and save. You can attach a status code group to many ticket types as needed.

Click the Ticket Priorities node to setup the level of criticality of a ticket to be addressed by the group or individual assignee. Save the settings.

Click the “Ticket Workflow Routing” node on the tree. Only the Type is required to be chosen and not the Product Group and the Ticket Team. If the Product Group and Team are left blank, then all values in the system for these two fields apply and will be included in this workflow. The system will look to route the tickets according to these fields in order of Type, then Product Group, then Ticket Team.

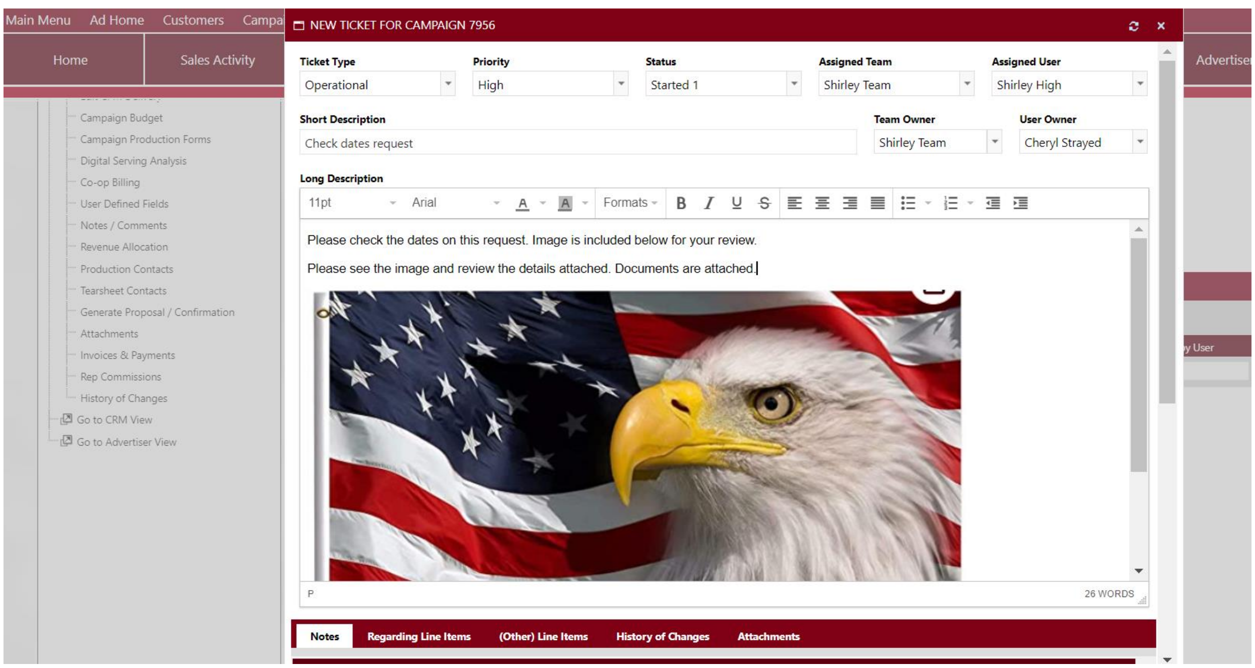


You can then choose the Group and Team for this workflow. The Ticket Status Code Group derives the Name on this list. So, this routing page defines the status of each ticket and to which team it will end up assigned based on this workflow. You can choose that the ticket would be routed to a person on the team and/or a routing team. For example, if a ticket status is Open and you'd like to route it to a user on the specific team, you can choose the user name, and then once the ticket changes status to In Progress, the ticket will then be routed to a team which you choose in the drop-down. If you check the box "User Selected" the system allows user to choose the options in the order entry screen.

Navigate to enter a new campaign line item. Then click the Tickets tab and click "Add Ticket". Choose the Type from the dropdown menu. This sets the workflow in the following fields according to the setup. Once the ticket is saved, it's not possible to edit the Ticket Type. Choose the Priority from the drop-down as setup above. Choose the Status from the drop-down. Choose the Assigned Team and Assigned User from the drop-down menu.

Note that if you change the Status drop-down, the Assigned Team and User will change according to the setup above.

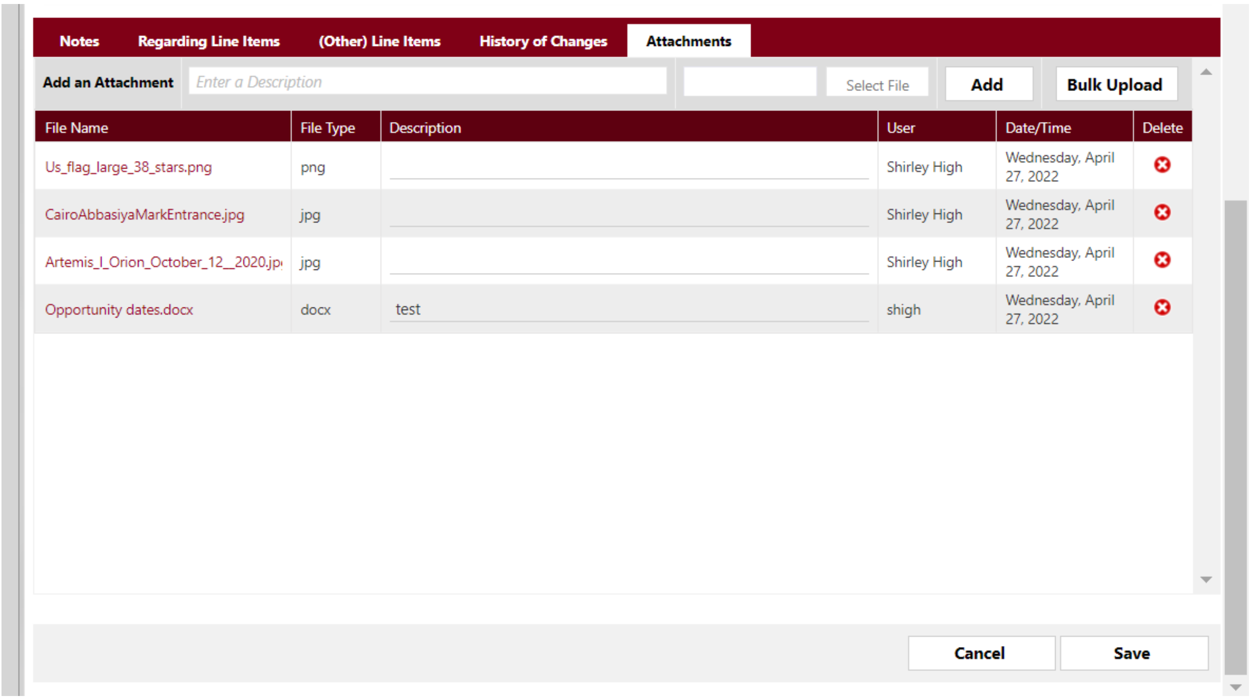
Enter the short description for the ticket. Choose the Team and User Owners. These are the owners of the ticket. The Team Owner is optional.



The Long Description field allows for text or images which can be copied and pasted. If you'd like to make the window bigger, click the drag the bottom frame of the box.

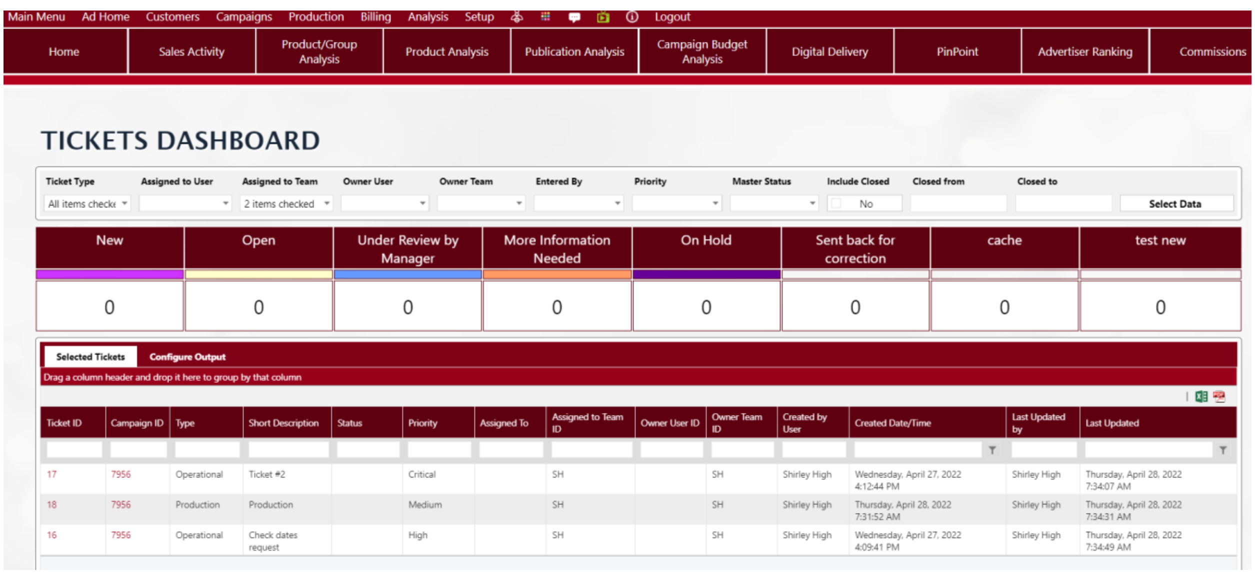
Check the line items to apply the ticket to in the "Other Line Items" tab. Write the notes in the Notes tab.

Click the Attachments tab, where you can add a single file using the “Select File” button and browse for it, then click “Add”.

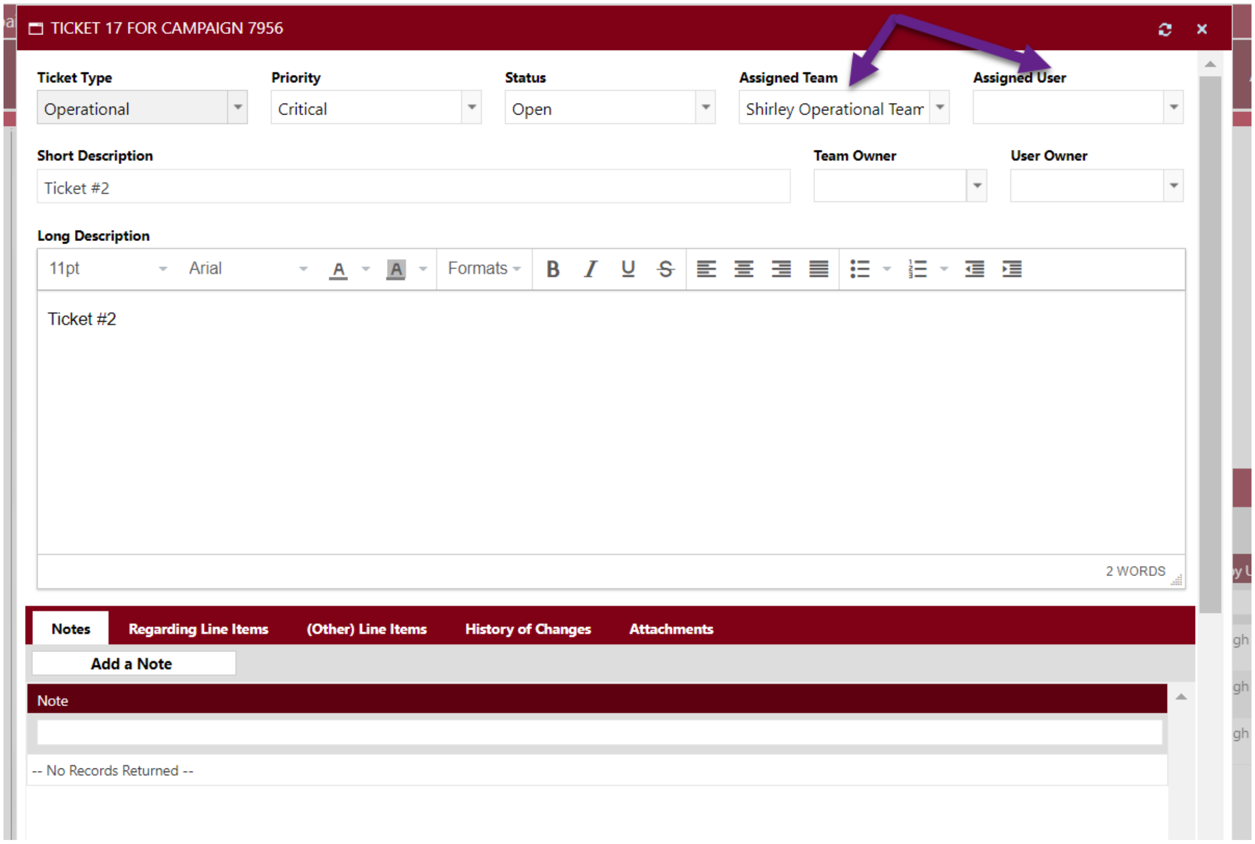


You can also use “Bulk Upload” and load up to 10 files of 30MB each. Once finished, click Save.

Navigate to the menu Campaigns -> Tickets Dashboard.



Choose the Ticket Type you’ve setup and the Assigned to User and click Select Data. The tickets display. Note that for tickets have an assigned user and assigned team on a campaign, you must select “Assigned to User” value to view these tickets. You can choose the value in Assigned Team” or leave blank to view these tickets. If tickets have no Assigned User but have Assigned Team, then you must leave “Assigned to User" field blank and select the field "Assigned to Team" values to view these tickets. You can also leave both fields blank to view all tickets if the tickets are only "Assigned to Team".

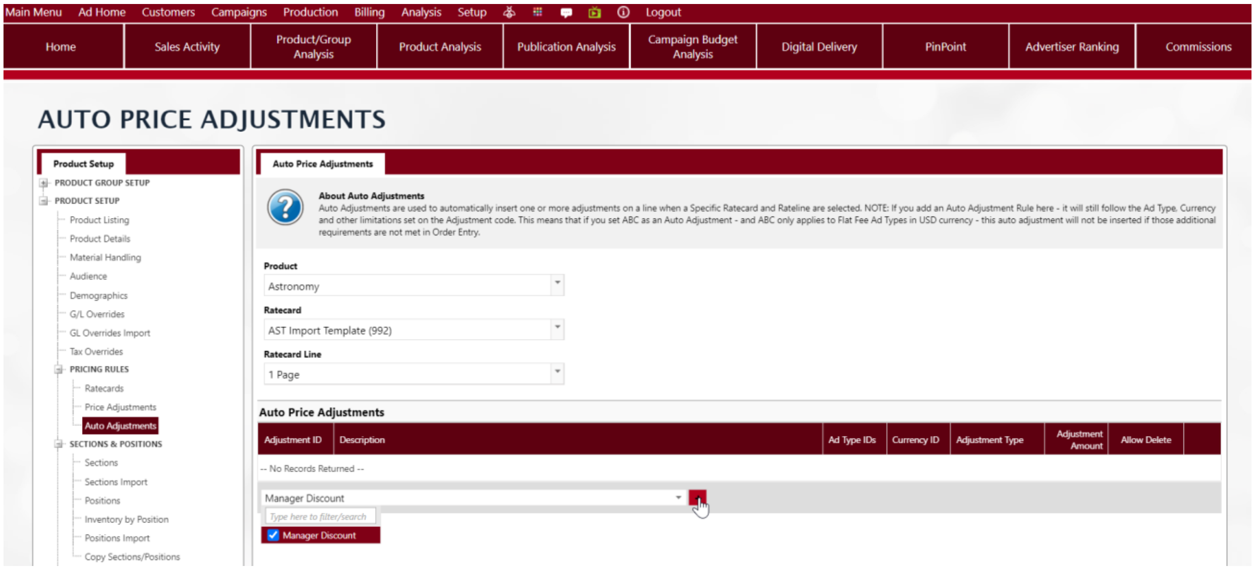


The Assigned Team and Assigned User fields on a campaign ticket are the drivers for the dashboard values.

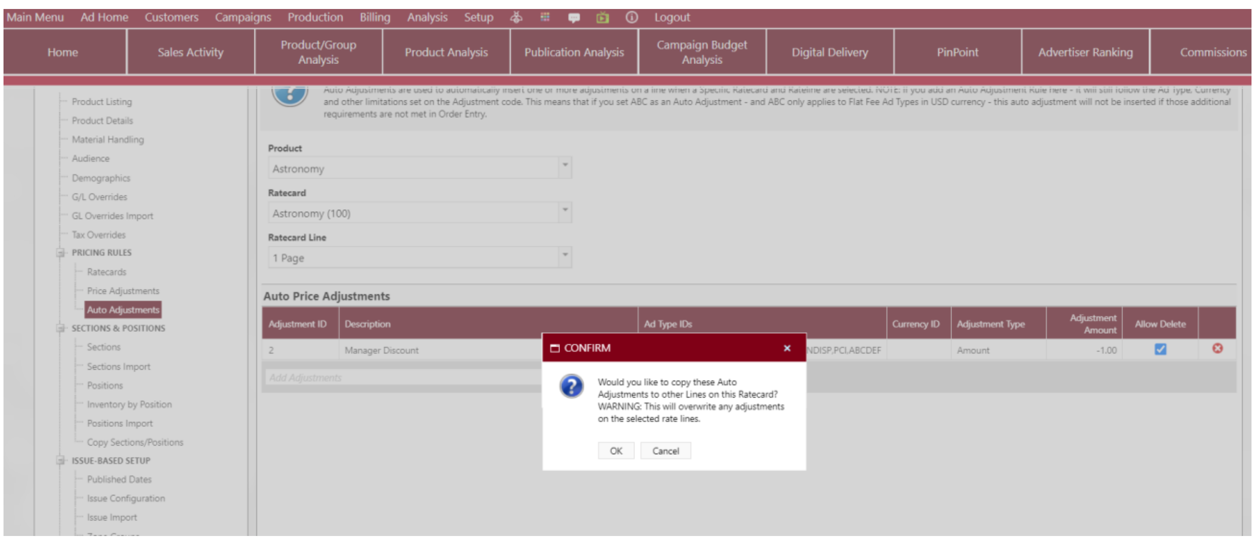
Ratecard Auto Adjustment Copy

Auto Adjustment on a Ratecard, when applied to one line, the system prompts user if the user would like to apply these adjustments to the remaining lines.

Navigate to a Ratecard on the Setup menu -> Product Setup screen -> Auto Adjustment.

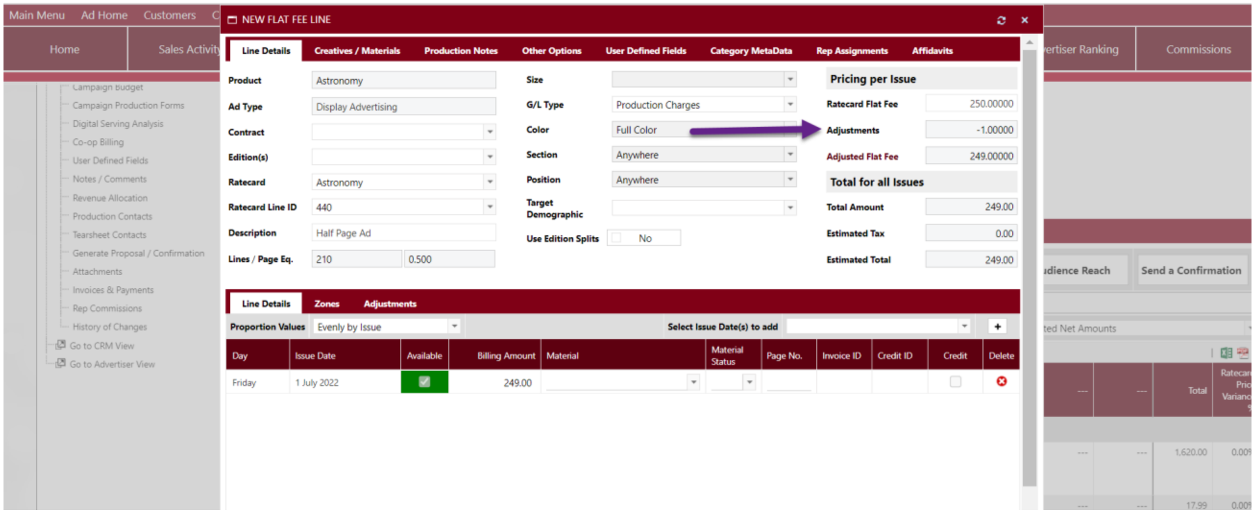


Select the Product, Ratecard and Ratecard Line from the respective drop-down menus. Choose the Adjustment line and click the + sign. Click the Save and confirm. The system displays a message asking if you'd like to apply the auto adjustment to all lines on the Ratecard.



Click OK and a new pop-up screen allowing you to check all or some of the lines to which to apply this Auto Adjustment. Select the lines and click Copy.

Navigate to create a campaign line item using one of the copied Ratecard line with the adjustment.

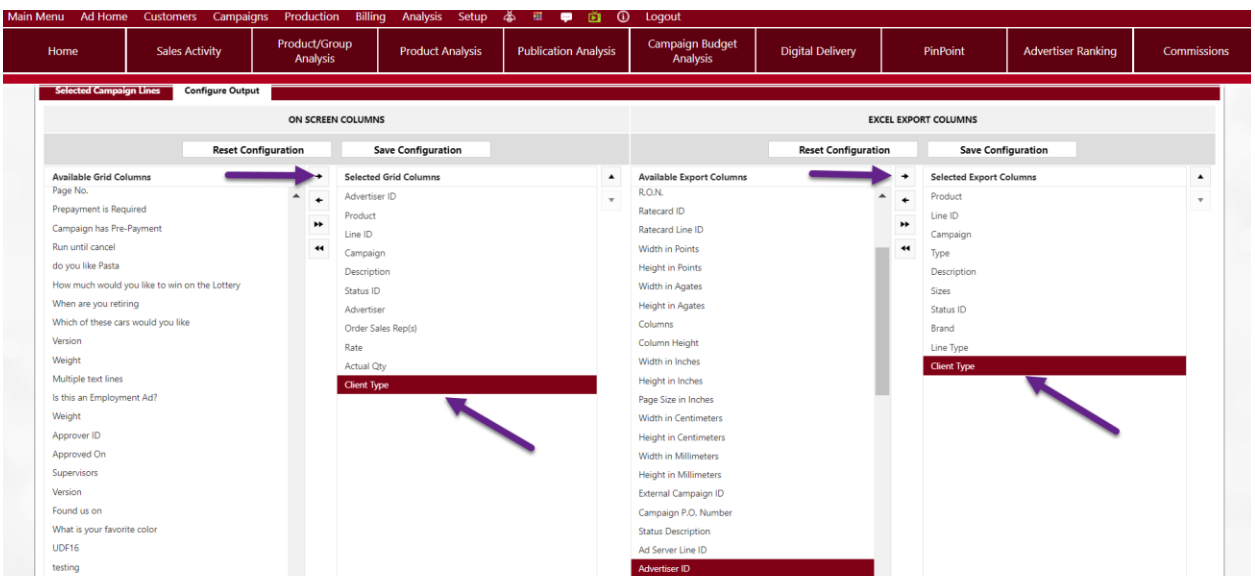


The adjustment is applied successfully.

Orders by Product – Client Type

Orders by Product report has a new field for Client Type.

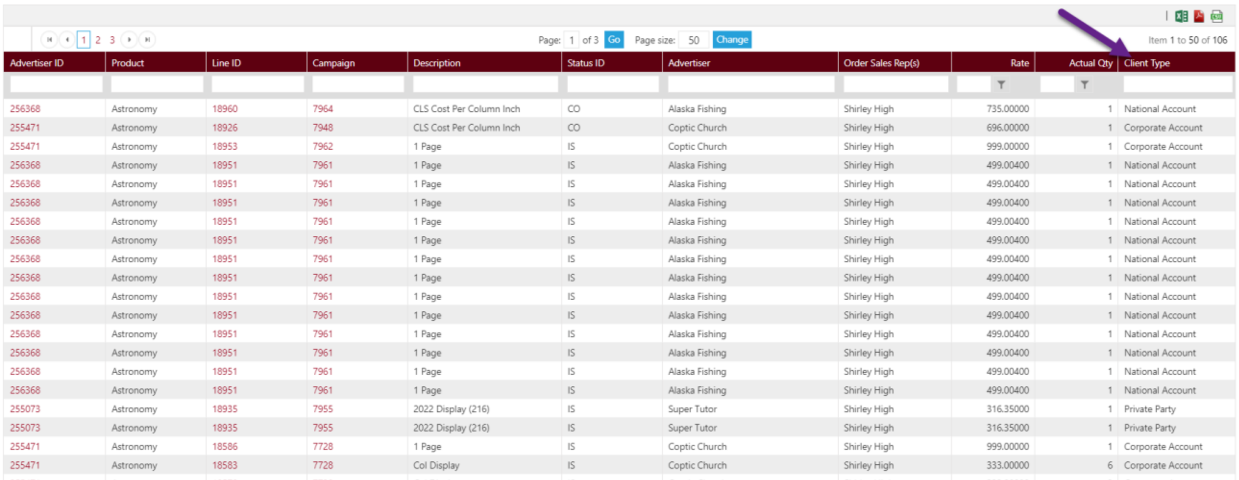
Navigate to the menu Campaigns -> Orders by Product. Run the query on the product and dates.



Click the node “Configure Output”. In the “Available Grid Columns” click the “Client Type” field and then click the right facing arrow to move the field to “Selected Grid Columns”. Click Save Configuration.

Repeat the step for the Excel Export Columns side.

Click the “Selected Campaign Lines”. The client Type is now displaying and showing the Client Type for each client on the list.



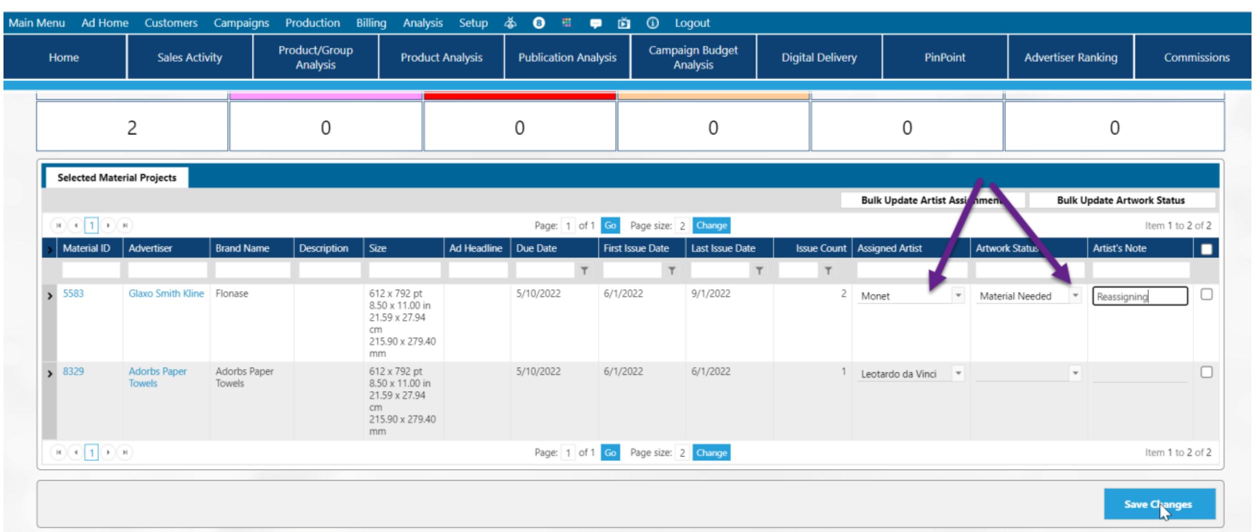
Advertiser ID	Product	Line ID	Campaign	Description	Status ID	Advertiser	Order Sales Rep(s)	Rate	Actual Qty	Client Type
256368	Astronomy	18960	7964	CLS Cost Per Column Inch	CO	Alaska Fishing	Shirley High	735.00000	1	National Account
255471	Astronomy	18926	7948	CLS Cost Per Column Inch	CO	Coptic Church	Shirley High	696.00000	1	Corporate Account
255471	Astronomy	18953	7962	1 Page	IS	Coptic Church	Shirley High	999.00000	1	Corporate Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
256368	Astronomy	18951	7961	1 Page	IS	Alaska Fishing	Shirley High	499.00400	1	National Account
255073	Astronomy	18935	7955	2022 Display (216)	IS	Super Tutor	Shirley High	316.35000	1	Private Party
255073	Astronomy	18935	7955	2022 Display (216)	IS	Super Tutor	Shirley High	316.35000	1	Private Party
255471	Astronomy	18586	7728	1 Page	IS	Coptic Church	Shirley High	999.00000	1	Corporate Account
255471	Astronomy	18583	7728	Col Display	IS	Coptic Church	Shirley High	333.00000	6	Corporate Account

You can also search by partial or full text in the blank box beneath the Column heading to narrow down your results.

Reassign Artist and Material Status in Artwork Production Management

Artwork Production Management screen now allows for removal of an Artist from any record regardless of the artwork status being selected or not. This will help if user desires to release a piece of artwork from one artist to be free to be assigned to another artist and change the status of artwork independent of the artist assigned to it.

Navigate to the menu Production -> Artwork Production Management. Select the search criteria for the material.

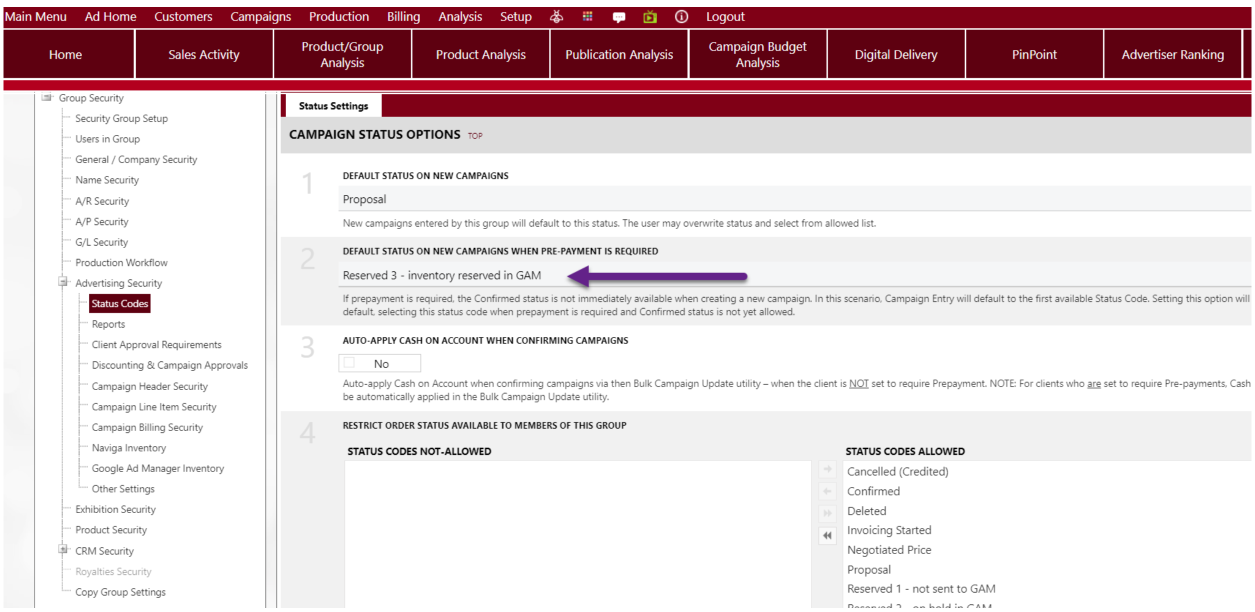


In the results, note that you can now choose from the drop-down menu of Artists and change it on a record and choose the artwork status or leave blank. When finished, click Save Changes.

Default Campaign Status when Prepayment is Required

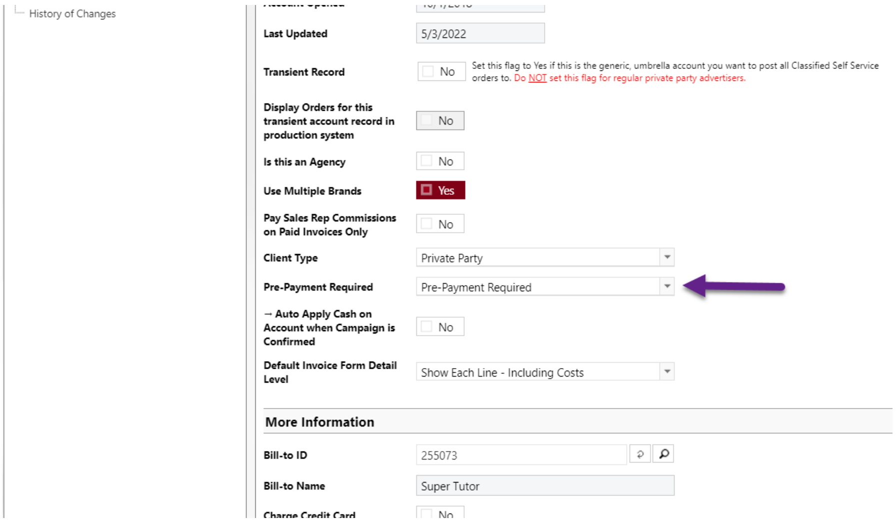
New security option “Default Status on New Campaigns when Pre-Payment is Required” allows user to set the default campaign status here for advertisers which are setup to require prepayment before confirming a campaign regardless of the default campaign status setting in Group security. Typically, if prepayment is required for an advertiser, the Confirmed status is not immediately available when creating a new campaign. But if this option is checked, then this option overrides the default, selecting this status code when prepayment is required and Confirmed status is not yet allowed.

Navigate to the security menu in Setup -> Admin -> Group Security -> Advertising Security.



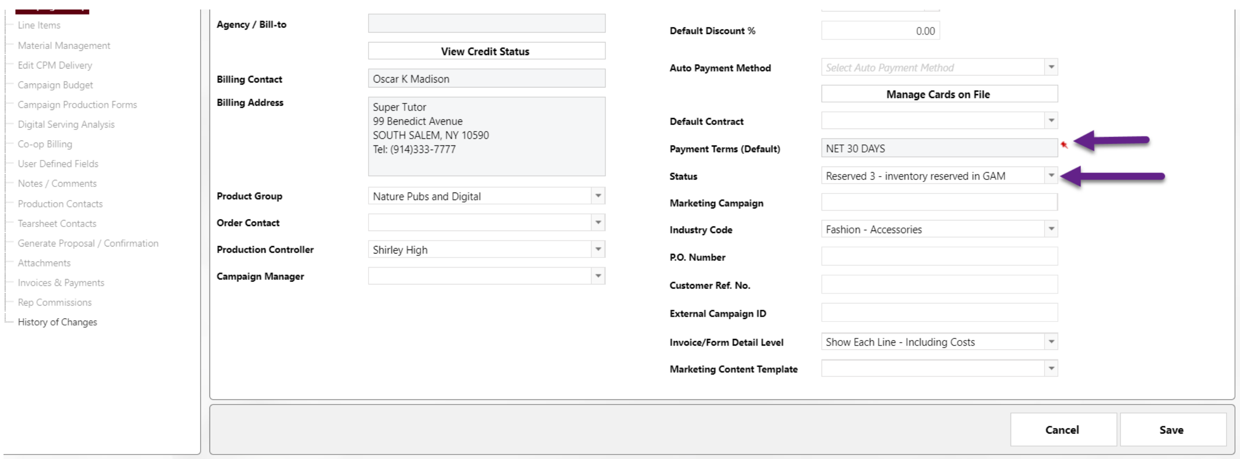
Set this field to any value, for example R3 status. Save the settings.

Navigate to the menu Customers -> Advertiser Agency Maintenance -> Choose an advertiser from the drop-down menu. Click on the Advertising Security node and scroll to the Prepayment option setting it to “Pre-Payment Required”.



Save the settings.

Navigate to create a new campaign for this advertiser.



Note that the Status defaults to R3 which is the one setup in Group Security and there's a little red mark in the Payment Terms field to indicate the Prepayment Required option.

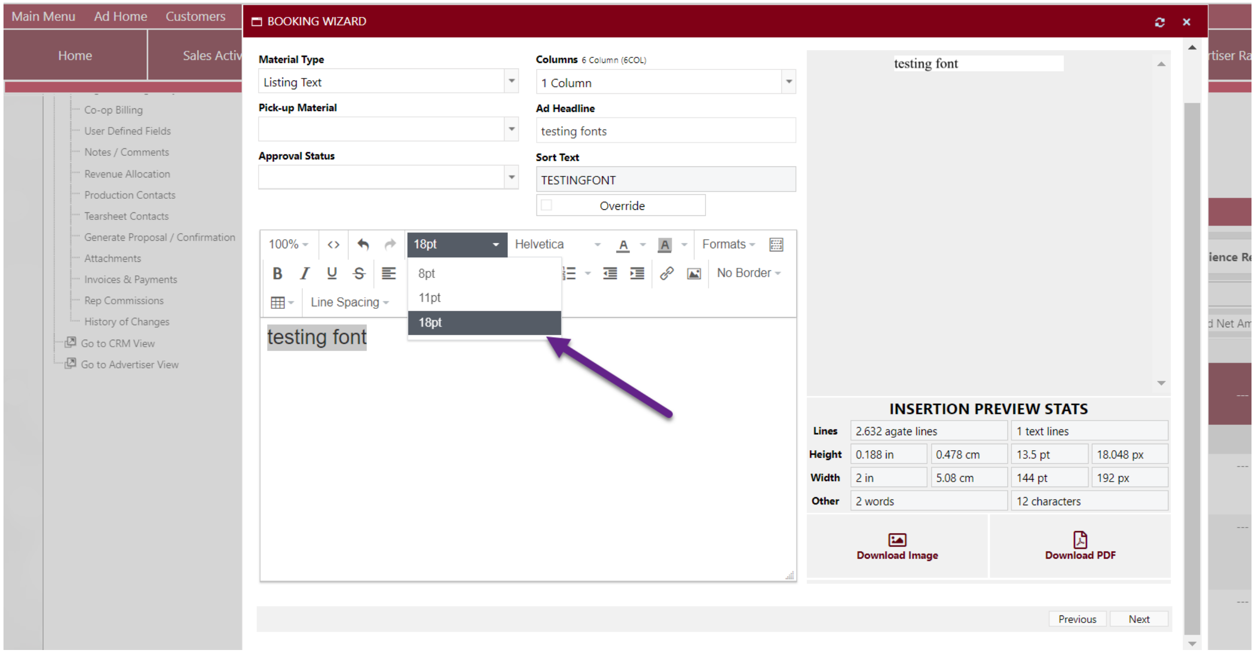
Click the Status drop-down and note that the Confirmed Status is absent from the list.

Font Settings for Liner Ads

Advertising System Parameters screen includes a list of font sizes which can be assigned in the system to limit the font size that a user can utilize when creating classified liner ads.

Navigate to the menu Setup -> Advertising Setup -> System Parameters. Scroll to the section "Font Size Restrictions" and click on the fonts on the left side and click the right facing arrow to move them to the right column to make them available for users in line entry screen. If you leave all options on the left hand side, then all font sizes are available to use in line entry. Save the settings.

Navigate to create a campaign line using the second option of Classified non-template and choose or example Cost Per Word.

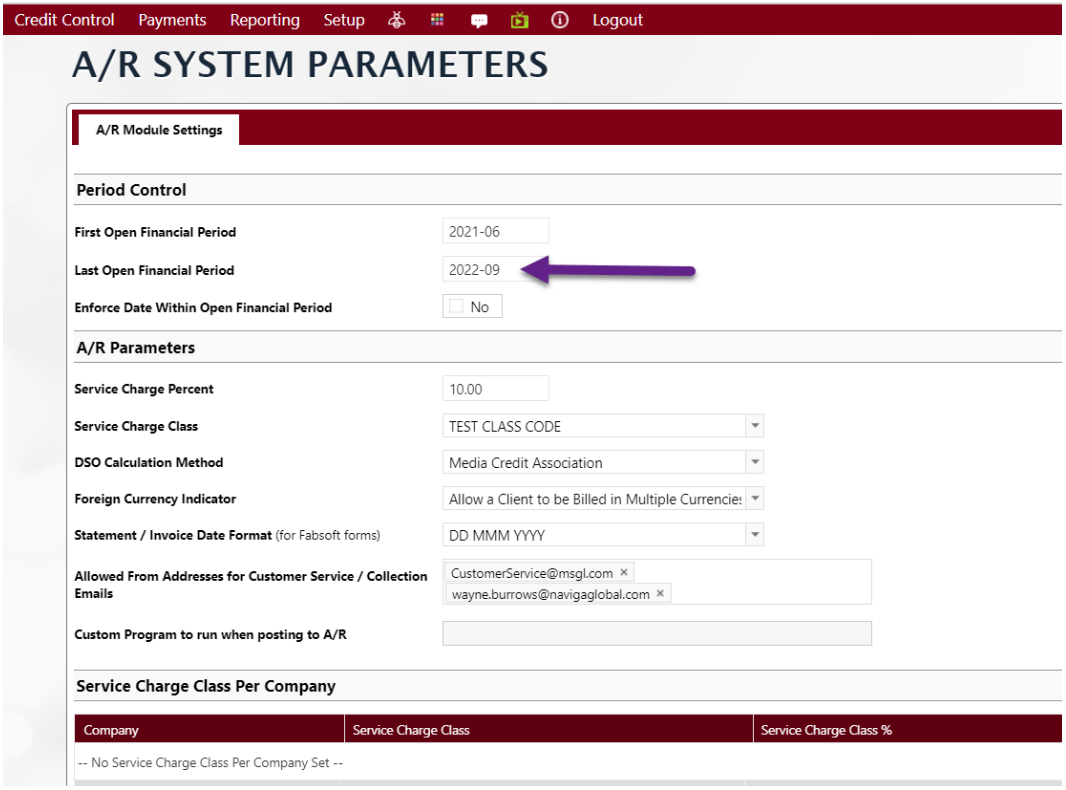


After entering the text, you can highlight it and click the drop-down for font options. The fonts are limited to the ones you choose in the setup above.

Change Issue Period per AR Open Periods

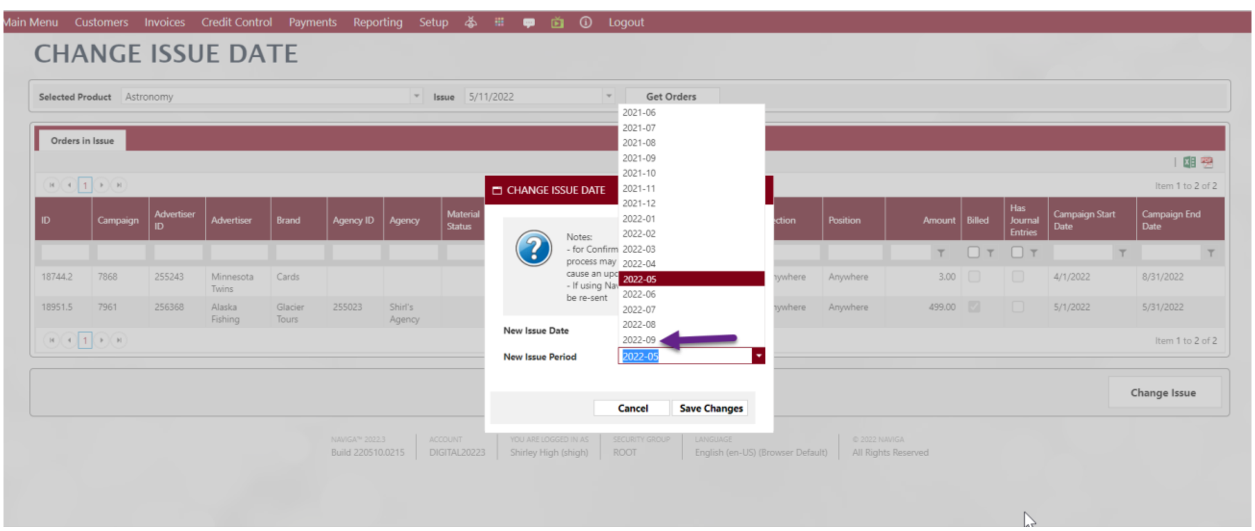
Change Issue Period screen for a publication allows for choosing any period as long as it is open in the AR menu setup.

Navigate to the AR menu Setup -> Admin -> AR Setup.



Set the "Last Open Financial Period" and save the settings.

Navigate to the AD menu Campaigns -> Change Issue Date



Search on the product and Issue and click "Get Orders". Click "Change Issue" and choose the new issue date and period from the menus. The period now displays all open periods per the AR setup above.

G/L Overrides Flag

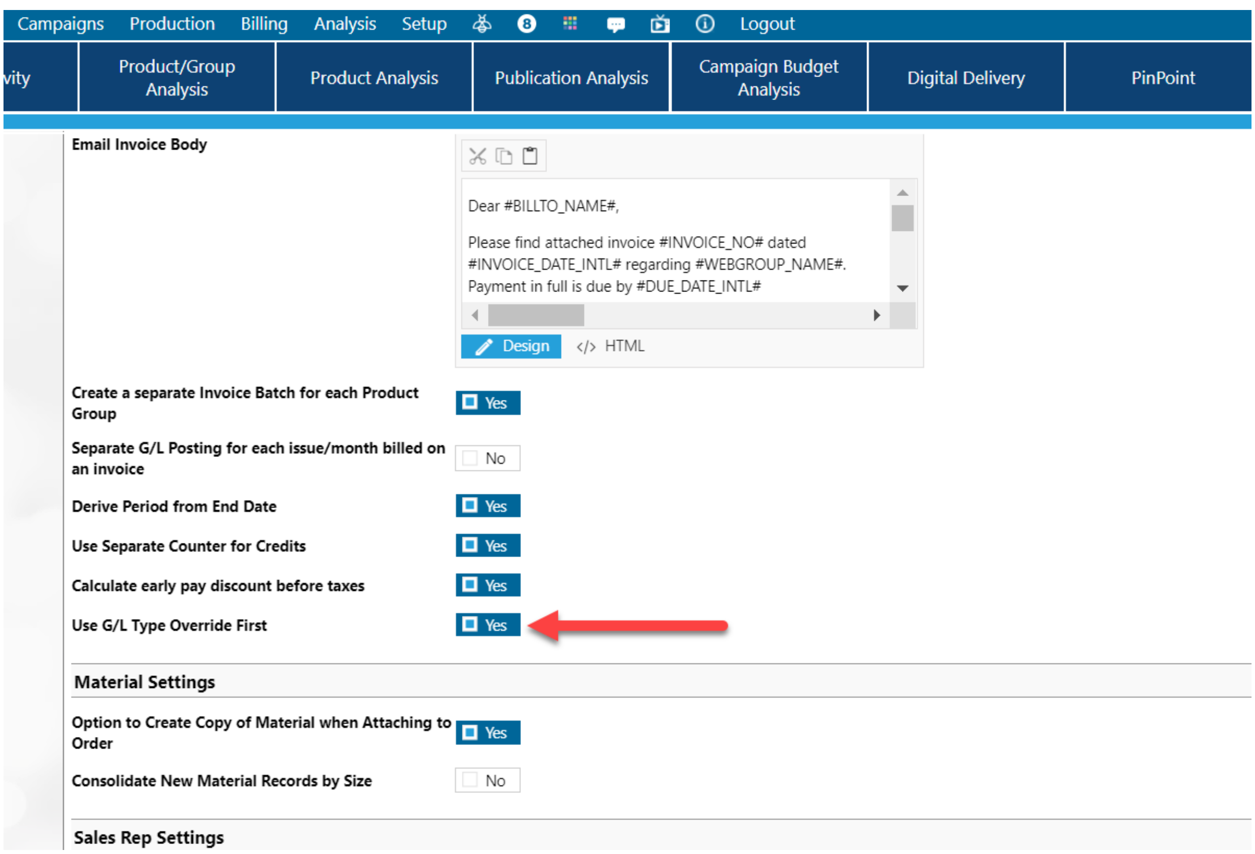
New security flag allows for a switch of G/L Overrides priority. The flag in the System Parameters called "Use G/L Type Override First": When this flag is unchecked, and its value is "No", the Product Setup G/L Overrides work in this order:

- Industry Code Overrides, then
- G/L Type Overrides, then
- G/L Defaults and then
- The Product's G/L Defaults in the Product Details screen.

When this flag is checked and its value is "Yes", the Product Setup G/L Overrides work in this order instead:

- G/L Type Overrides, then
- Industry Code Overrides, then
- G/L Defaults and then
- The Product's G/L Defaults in the Product Details screen.

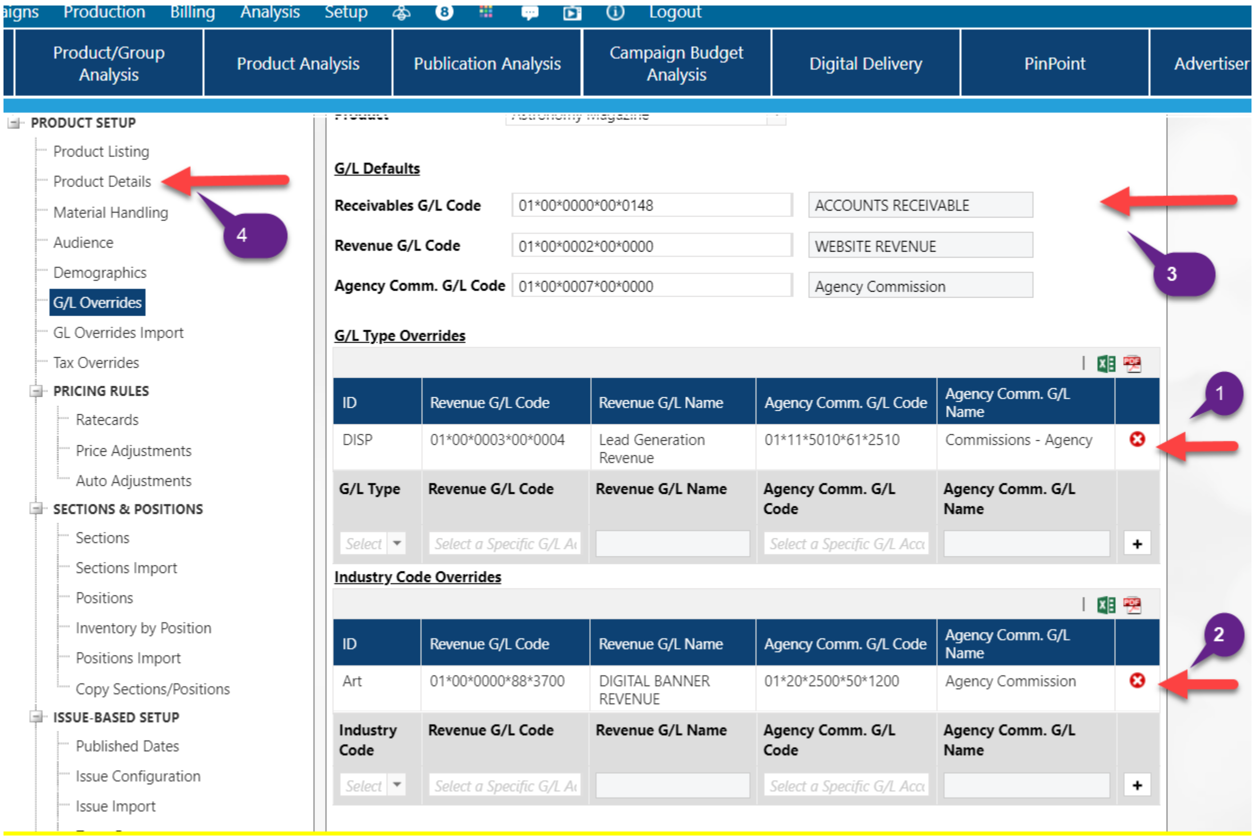
Navigate to the menu Setup -> Advertising Setup -> System Parameters. Scroll to the section "Invoice Settings". Check the flag "Use G/L Type Overrides First".



Check the flag as "Yes". Save the settings.

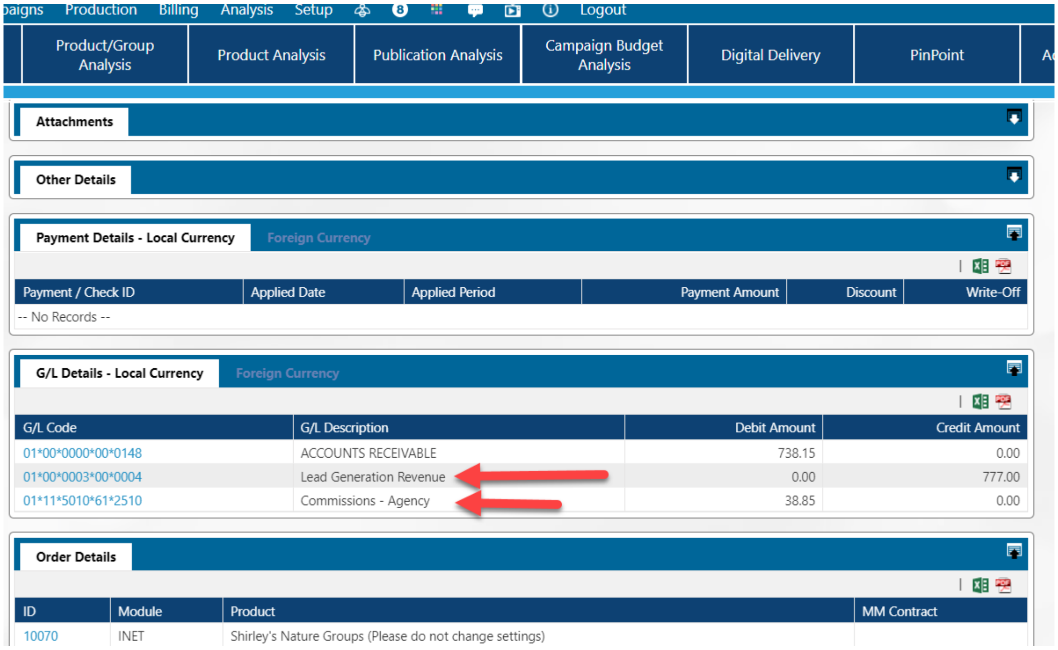
Navigate to the menu Setup -> Product Setup -> Query on the product to use.

Click the node G/L Overrides.



Choose the G/L Defaults, different G/L Type Overrides and Industry Code Overrides for an Industry Code.

Create a campaign using this product and industry code brand/advertiser. Bill the campaign and in the "Print Invoices" screen, click the hyperlink of the invoice.

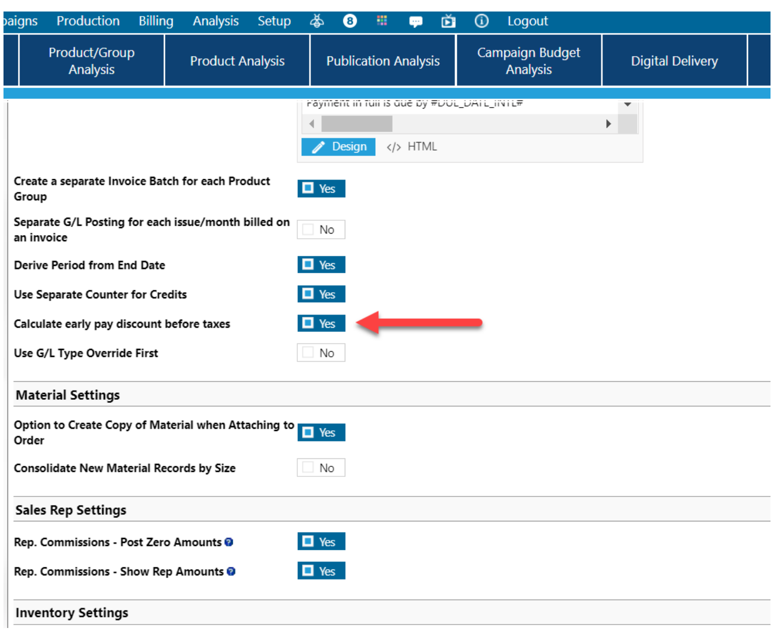


The G/L Details list the Revenue and Agency Commission in the G/L Overrides in the Product Setup screen.

Tax on Discounted Prepayment

New security flag to turn on/off calculation of early pay discount on the amount before taxes.

Navigate to the security menu Setup -> Advertising Setup -> System Parameters. Scroll to the field “Calculate early pay discount before taxes” and check it to “Yes”.

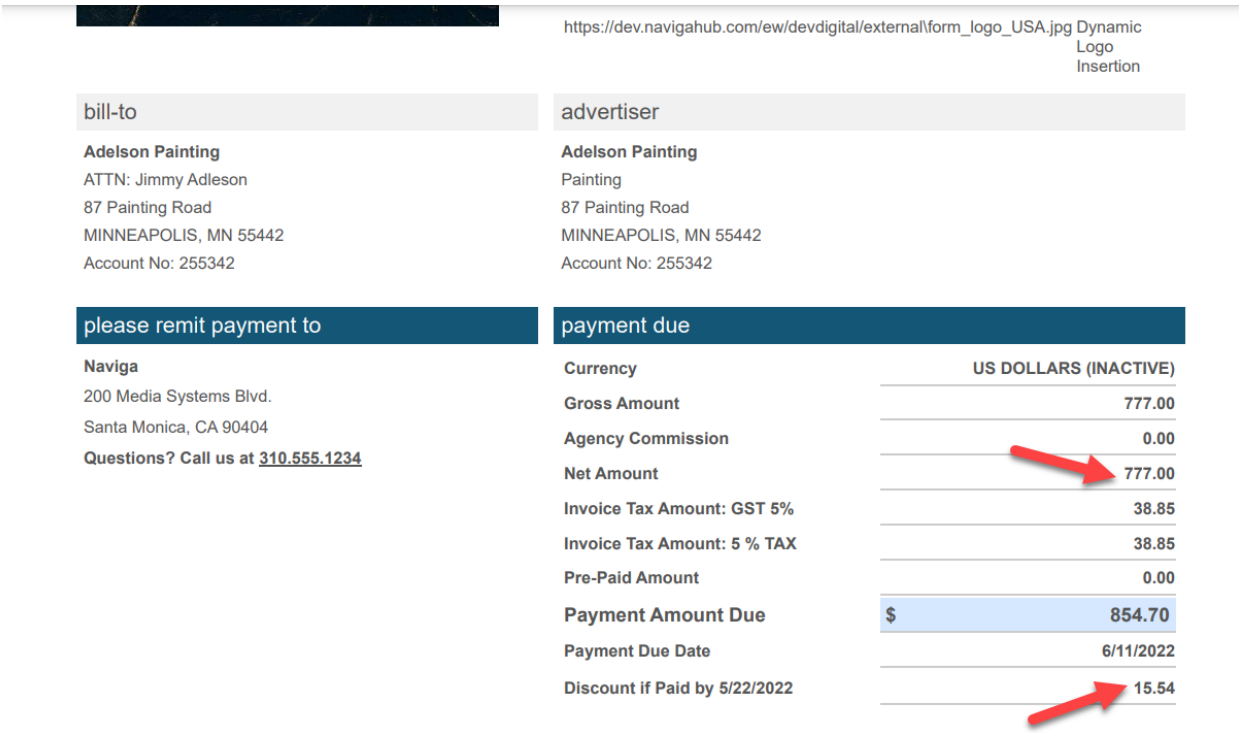


Save the settings.

Navigate to the menu Customers -> Advertiser Agency Maintenance and choose an advertiser. Click the Advertising Setup node and set the Payment Terms to a term which provides a discount if paid early, such as 2% Discount 10 Days. Choose a tax amount to use on the advertiser. Save the settings.

Navigate to create a campaign using this advertiser and bill the campaign.

View the invoice.



https://dev.navigahub.com/ew/devdigital/external\form_logo_USA.jpg Dynamic Logo Insertion

bill-to	advertiser
Adelson Painting ATTN: Jimmy Adleson 87 Painting Road MINNEAPOLIS, MN 55442 Account No: 255342	**Adelson Painting** Painting 87 Painting Road MINNEAPOLIS, MN 55442 Account No: 255342

please remit payment to

Naviga
200 Media Systems Blvd.
Santa Monica, CA 90404
Questions? Call us at 310.555.1234

payment due

Currency	US DOLLARS (INACTIVE)
Gross Amount	777.00
Agency Commission	0.00
Net Amount	777.00
Invoice Tax Amount: GST 5%	38.85
Invoice Tax Amount: 5 % TAX	38.85
Pre-Paid Amount	0.00
Payment Amount Due	$ 854.70
Payment Due Date	6/11/2022
Discount if Paid by 5/22/2022	15.54

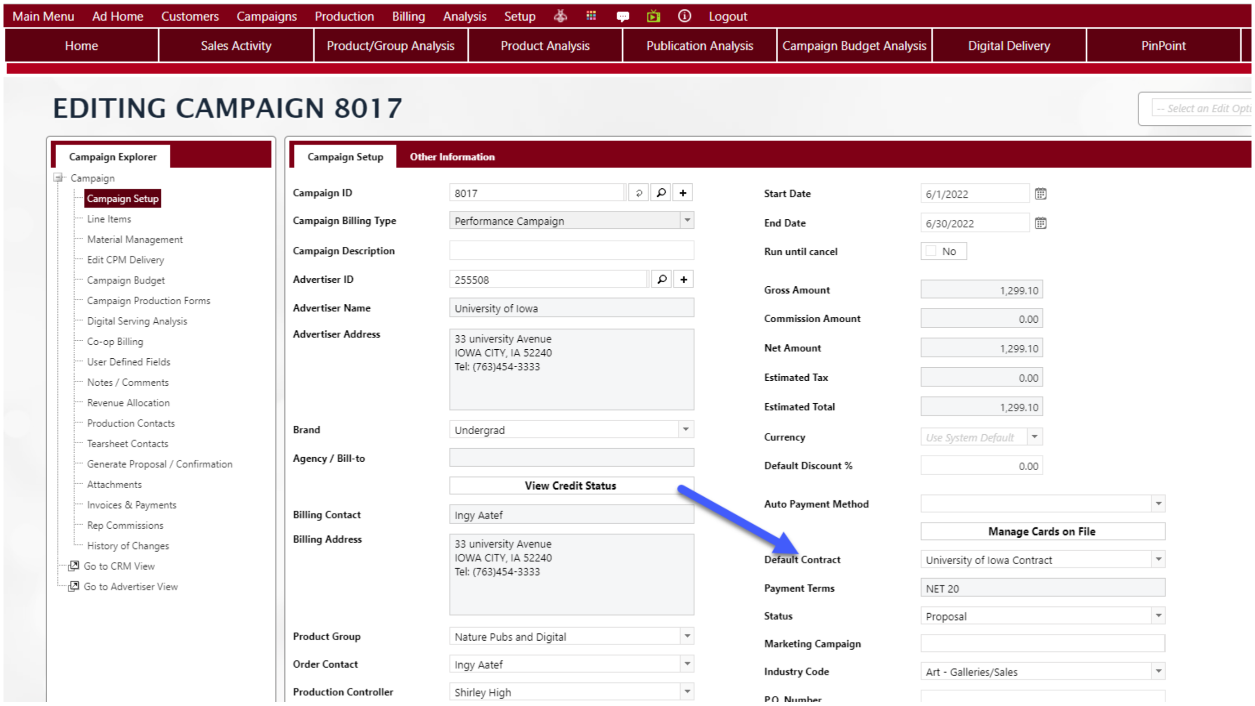
The discount is calculated based on the pre-tax amount.

Insertion Count Summary for Contract

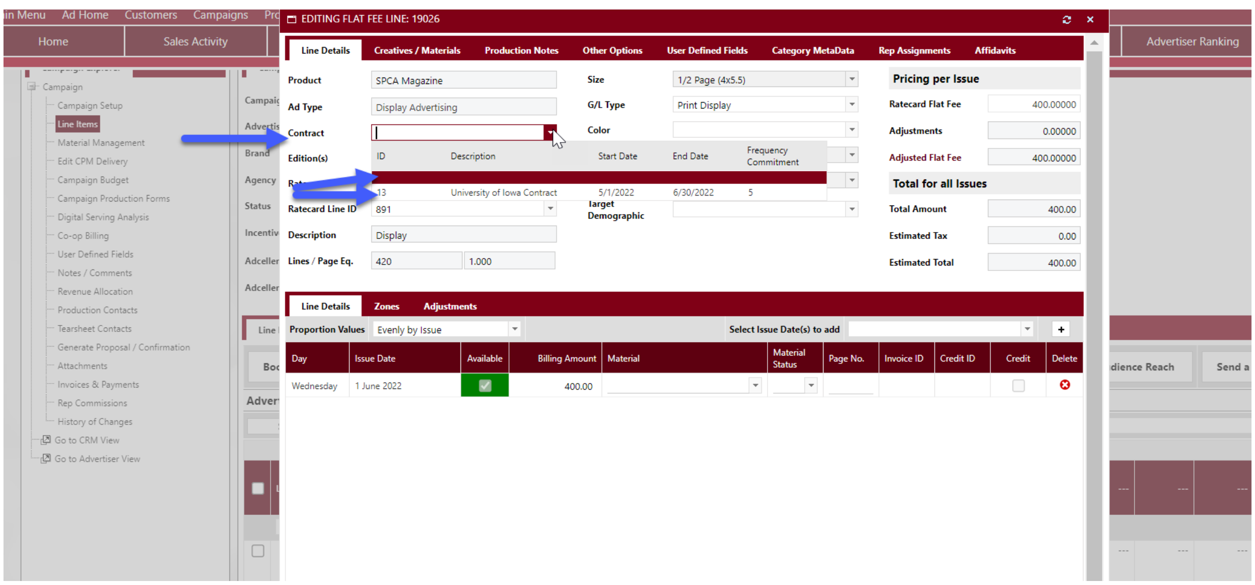
Summarize by Insertion Count is a new option to do so on the Contracts screen for a client. This provides a summary of number of orders using this contract by issue.

Navigate to the menu Customers -> Client Contract Setup. Choose a client and click + to add a new contract for this client. Choose the product from the drop-down list, frequency and volume details.

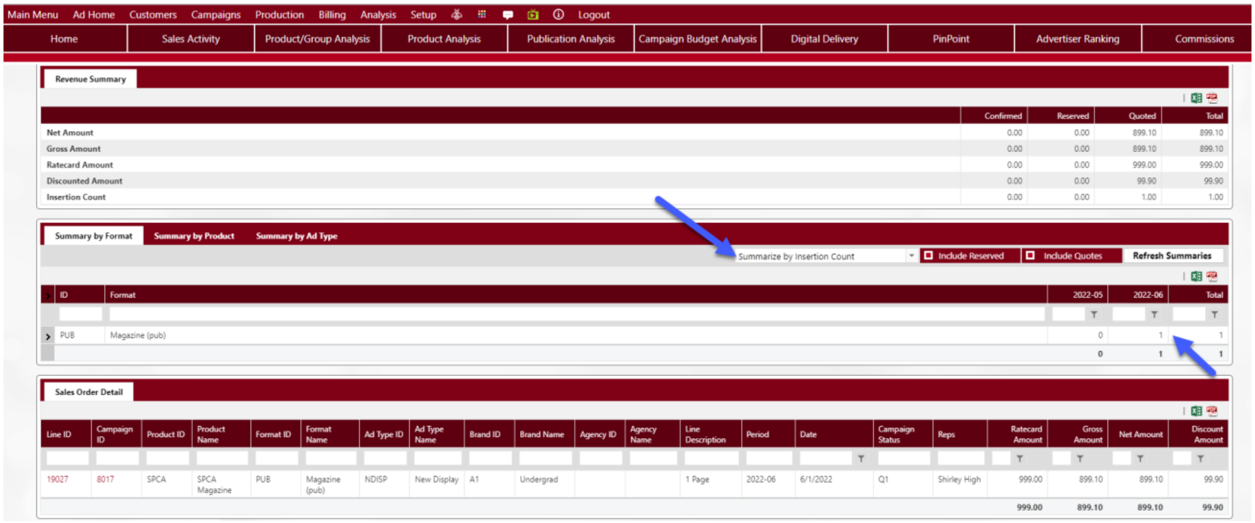
Navigate to create an ad for this client using this contract as a default on the campaign or on the line itself of the order.



Using the full line-entry you can decide on whether to include the contract or not.

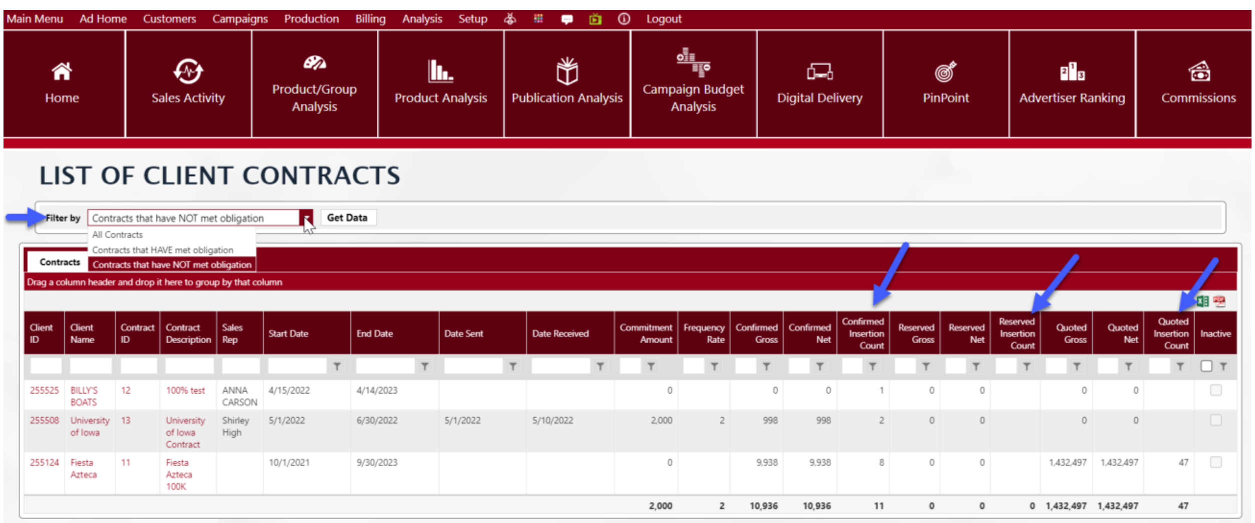


Navigate to the Contracts menu again and scroll to the bottom section titled “Summary by Format”.



Choose “Summarize by Insertion Count” from the drop-down option. The results show the number of lines using this contract. Note that if the campaign header has the contract applied, you can use the Booking Wizard to book the line as well and add or remove the contract on it as well. These apply to all tabs of Summary by.

Navigate to the menu Customers -> List of Client Contracts.



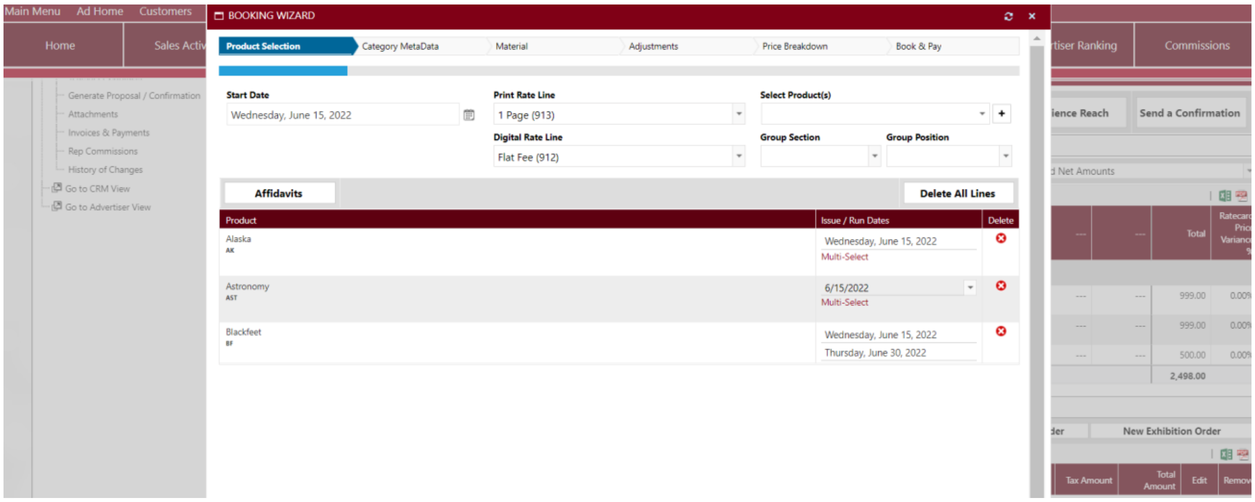
Note the new filters to allow you to choose how to run the report to show all contracts, ones who have met obligations and ones who haven’t. The data records display also the Insertions by campaign status.

Wizard Cut-off Date

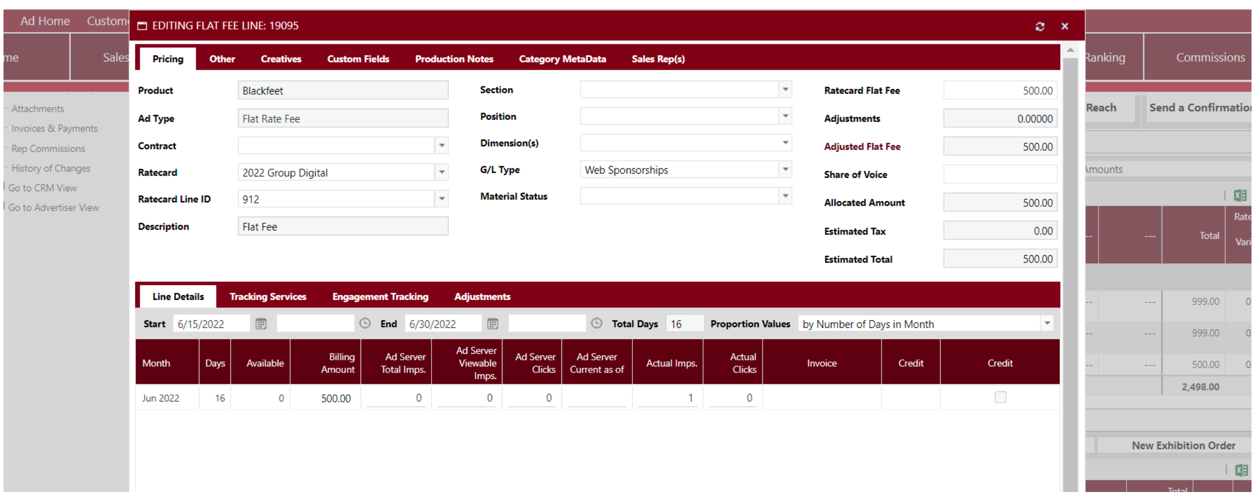
Security flag added to allow user to determine a cut off campaign status, entered using Booking Wizard option, at which when the link to the line item is clicked, user doesn’t go through the Booking Wizard steps any longer. The combination used to create those lines is saved at this campaign status and editing any related lines will be done to the individual line as full line entry. If left blank, this occurs when the order is billed.

Navigate to the menu Setup -> Advertising Setup -> System Parameters. Scroll to the flag "Booking Wizard Status Cut-off". Choose an option from the drop-down menu such as Reserved. Save the security settings.

Create a campaign in the Quote status and use the Booking Wizard option. Edit the line item and note that the pop-up screen to edit is the Booking Wizard screen.



Change the campaign status to Reserved. Save. Then edit the line item again.



The screen now is the full line entry and opens to the line with the link which you clicked to edit.

Accounts Receivable Module

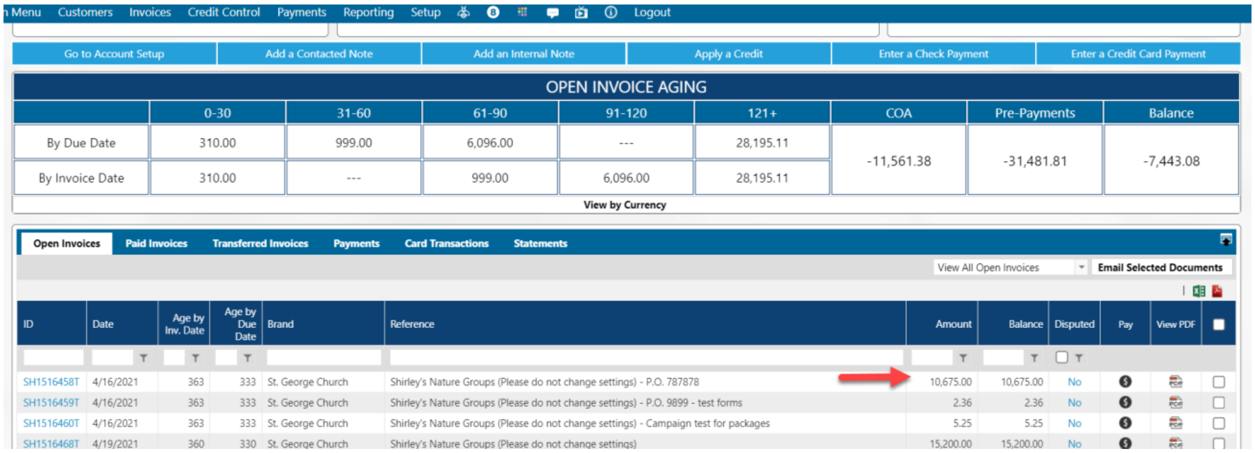
Local Payment Amount in Receipt Template

Added #LOCAL_PAYMENT_AMOUNT# tag to A/R payment receipts template.

Navigate to the menu Setup -> Receipt Template Setup.

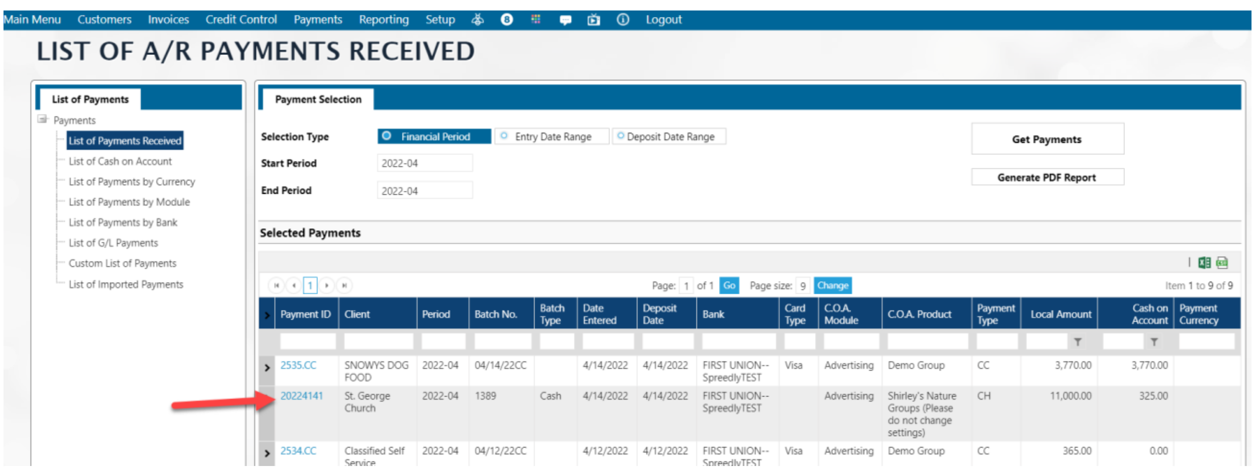
Choose the template to edit. Add the new mapped field #LOCAL_PAYMENT_AMOUNT# to the HTML so that it would reflect the payment amount in local value. Save the template.

Navigate to the menu Customers -> Choose a customer from the menu or search for one. In the “Open Invoices” tab, click the Pay icon.

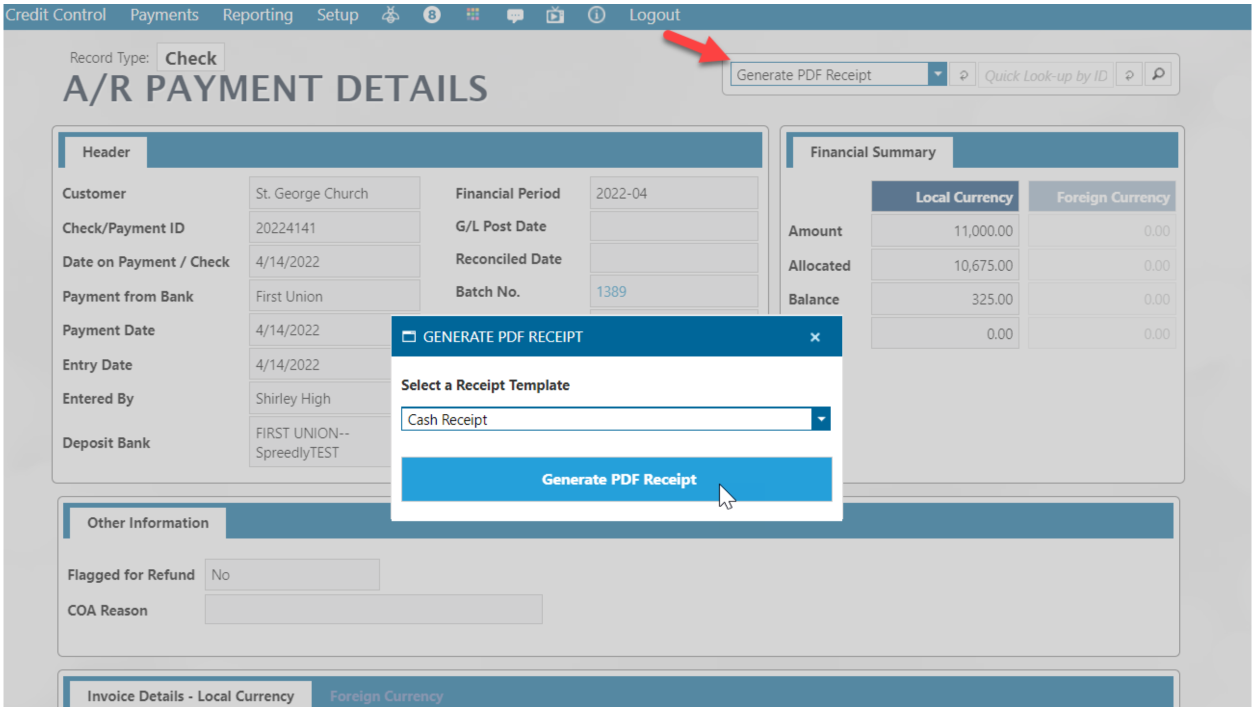


Choose Pay by check or credit card and the payment screen opens up where you can process the payment.

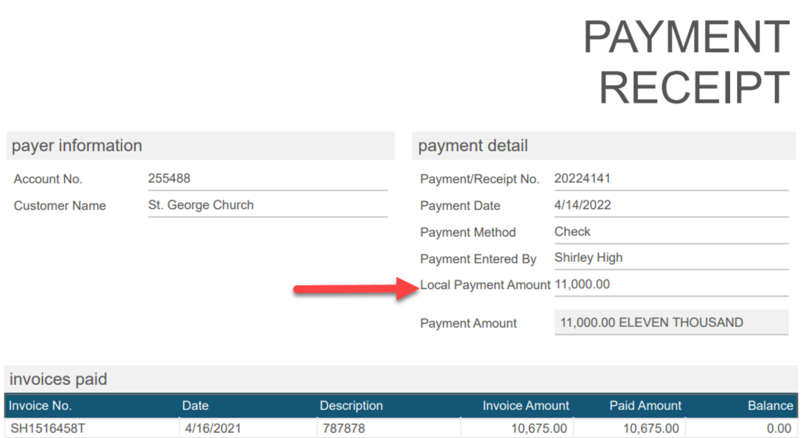
Navigate to the menu Payments -> List of Payments Received. Search on the financial period of the payment above. Click the hyperlink to the payment.



Click the “Generate PDF Receipt” from the drop-down and then choose the template which you’ve edited above.



Click the Generate PDF Receipt button.



PAYMENT RECEIPT

payer information

Account No.	255488
Customer Name	St. George Church

payment detail

Payment/Receipt No.	20224141
Payment Date	4/14/2022
Payment Method	Check
Payment Entered By	Shirley High
Local Payment Amount	11,000.00
Payment Amount	11,000.00 ELEVEN THOUSAND

invoices paid

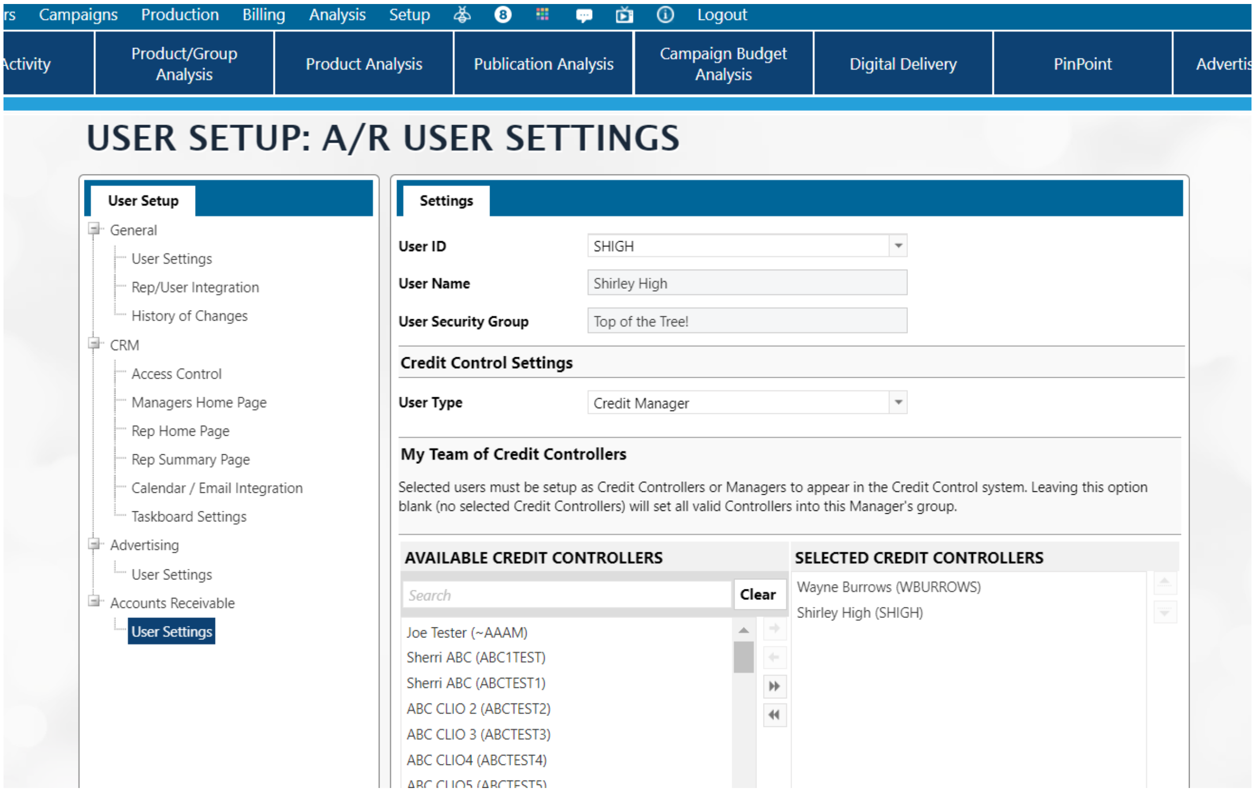
Invoice No.	Date	Description	Invoice Amount	Paid Amount	Balance
SH1516458T	4/16/2021	787878	10,675.00	10,675.00	0.00

The Local Payment Amount field is populated with the invoice payment amount in the local currency.

Setup of Credit Controller View of Other Controllers' Data

Ability to limit the collection people a Credit Manager has access to in the User Security setup and see their results in reports. If left blank, then this credit controller can view all other credit controllers' data.

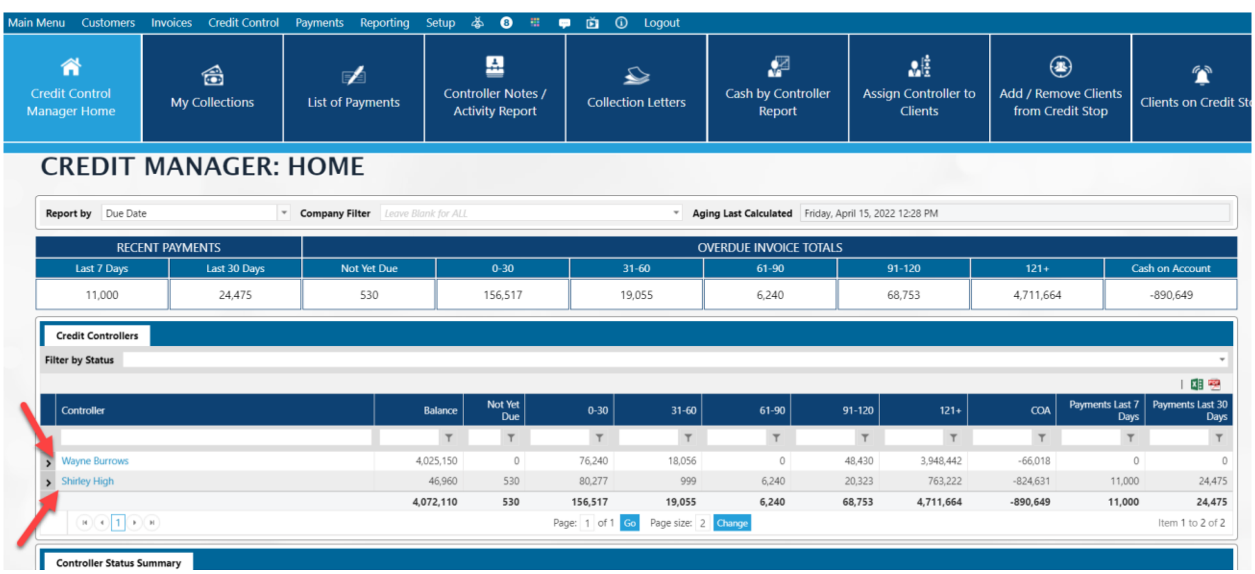
In the System Settings module, navigate to the menu Setup -> User Security -> Accounts Receivable -> User Settings.



In the section titled “Available Credit Controllers” and select the controller and then click the right facing arrow to add the name to the Selected Credit Controllers. If this option is left blank this user will have access to all controllers in the system.

Note that you can search for a controller to add by typing partial name or full name of the controller in the “Available Credit Controllers” column. Save the settings.

Navigate to the menu tile “Credit Control Manager Home”.

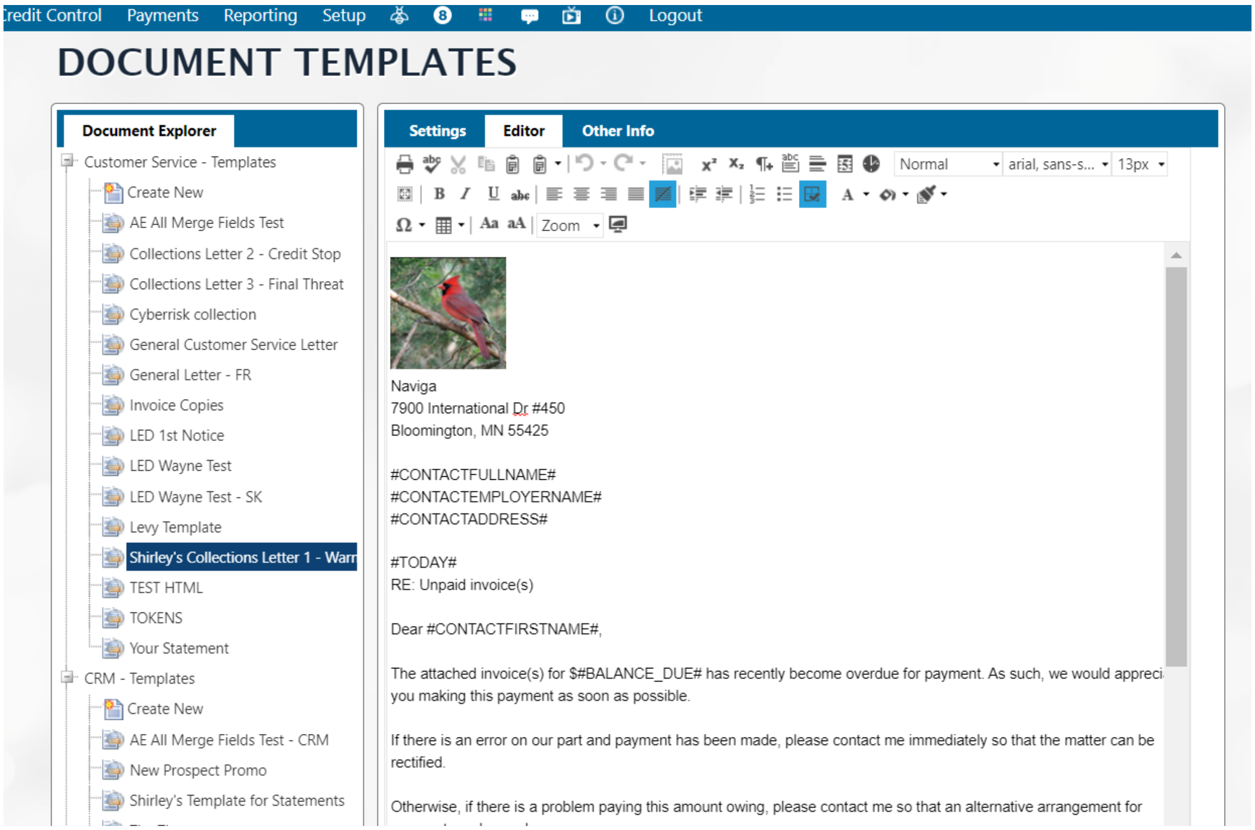


The system displays the control data for the controllers to whom you have access.

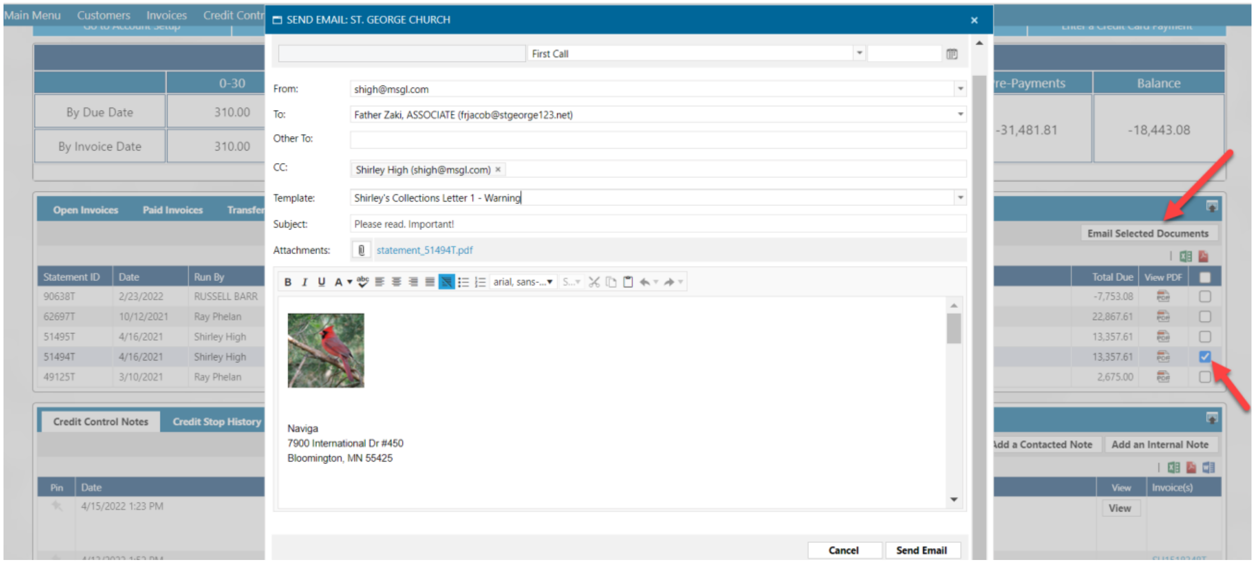
AR Statement Email Format

The AR Statement email sent to clients displays as an organized formatting of the email body text rather than a continuous body of text without breaks.

Navigate to the menu Setup -> Email/ Letter Templates. Format the letter body which you'd like to send as part of the statements sent to clients. You can include text and invoices due tables.



Navigate to the Customer Overview screen for a customer. Scroll and click the Statements tab.



Check the flag for an invoice. Then click Email Selected Documents.

Choose the template from the drop-down. Check the recipient's email and note that the note is formatted as designed.

CRM Module

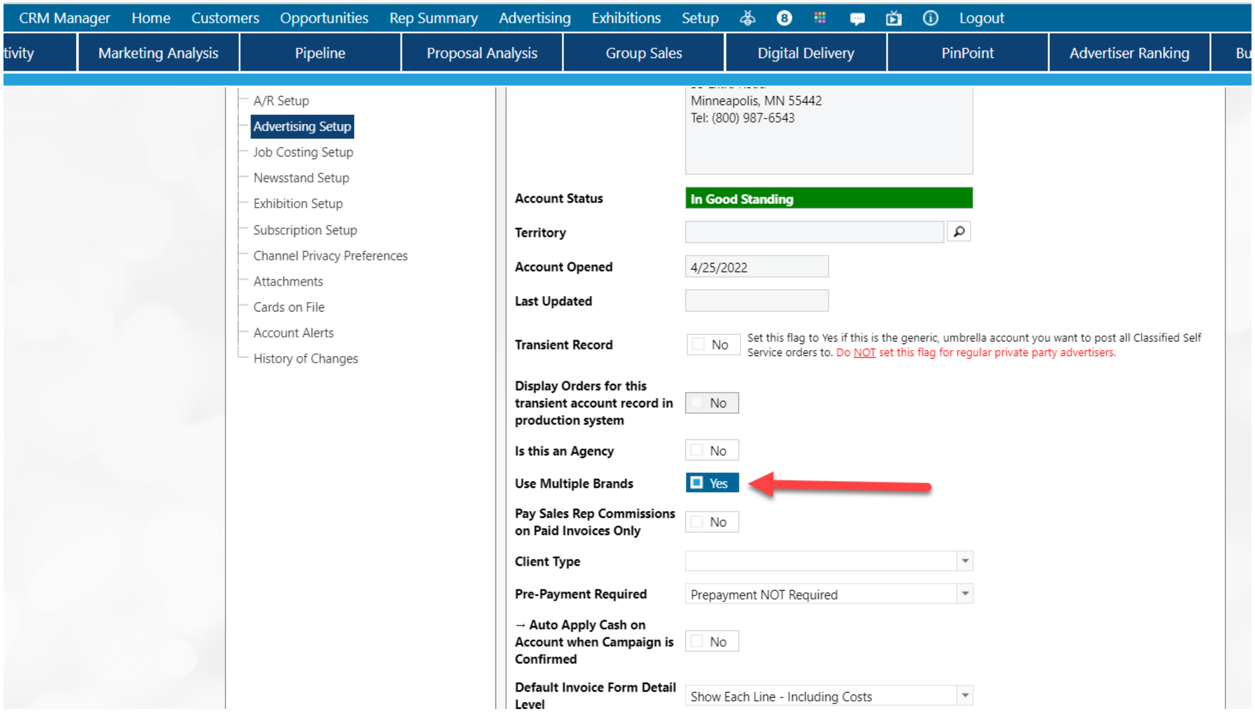
CRM Import Brands

CRM name import has been updated to use the "Use Brands" setting on Advertising setup to create names.

Navigate to the menu Advertising menu Setup -> Advertising Setup -> System Parameters. Note the setting of the flag "Set New Advertisers to Not Use Brands" if it's "Yes" to use one brand or "No" to allow new advertisers to have multiple brands. Leave the flag to option "No" to allow for multiple brands.

Navigate to the CRM menu Setup -> Import Names and Contacts. Download the Import template and fill it out and save it. Import the file.

Click the node "List of Imported Names" and search for the advertiser by Import ID. Click the hyperlink to the advertiser and then click the "Advertising Setup" node.



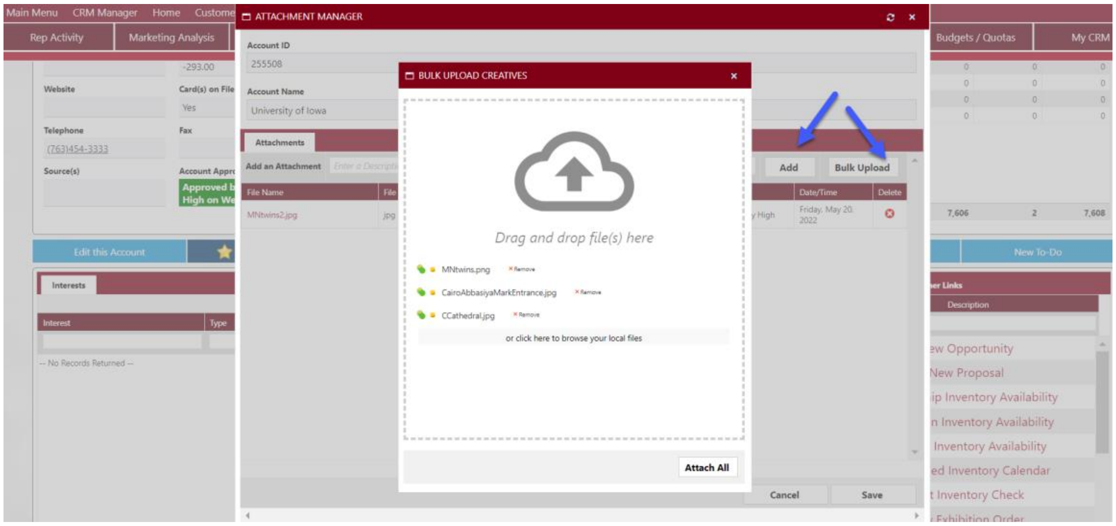
Note that the setting “Use Multiple Brands” is checked to “Yes”, which is identical to the Advertising header setup flag.

If you repeat the above steps with the Advertising header flag set to “Yes” to have the newly created or imported advertisers use only one brand, the setting for the imported advertiser for the “Use Multiple Brands” will be “No”.

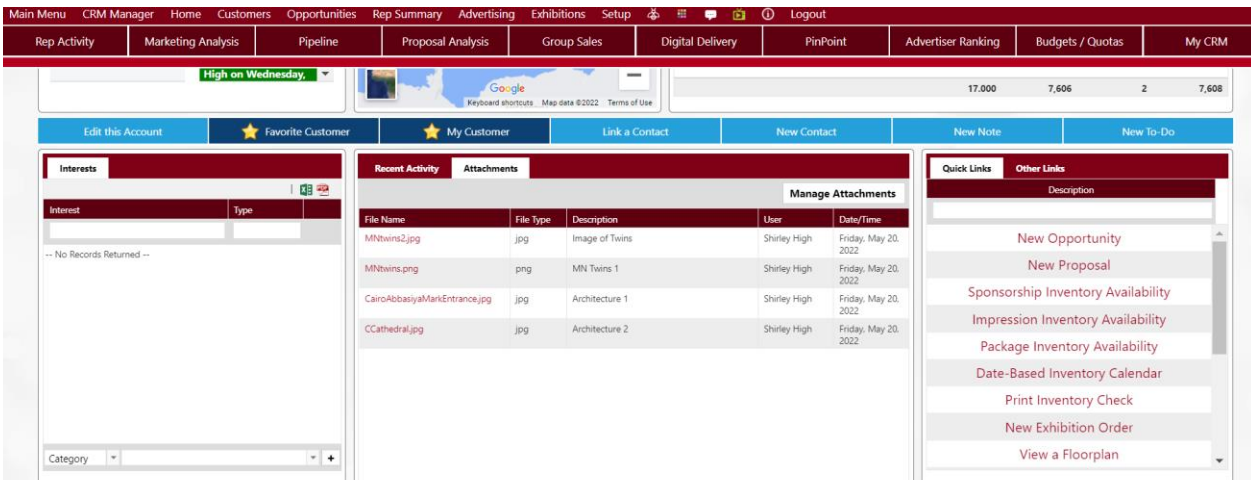
Attachments in Customer Overview Screen

Attachments are available in the Customer Overview screen.

Navigate to the menu Customers -> Choose a Customer. Scroll to the middle of the page and click the tab “Attachments”.



Enter the description of the file to be attached and select it and add it. You can also use the Bulk Upload to select several files and upload them in one step. Select multiple files and click "Attach All".



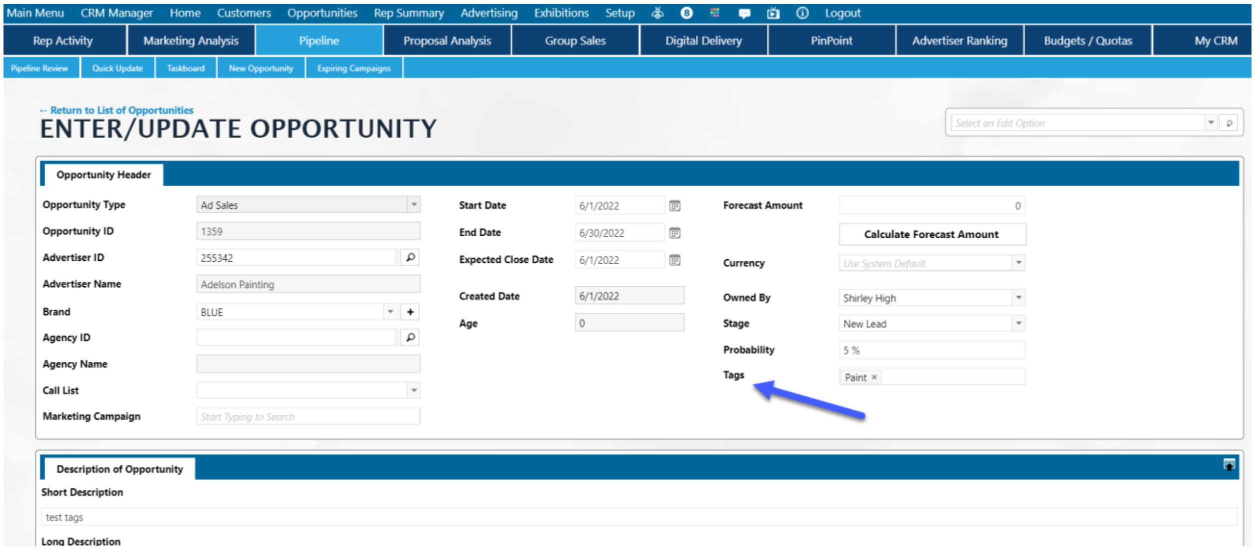
Once finished, you can click "Manage attachments" to delete or add more.

Click the hyperlinks to any of the attachments to view them at any time.

Opportunity Tags

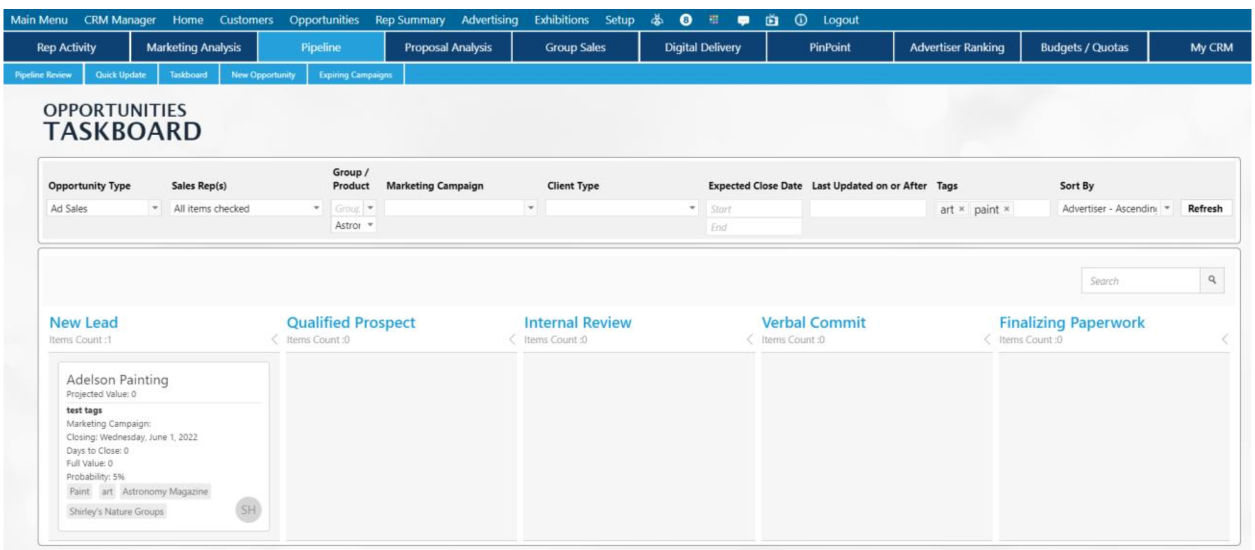
Opportunities have a field called "Tags" where user can enter a keyword to search for the opportunity on the Taskboard.

Navigate to the menu Opportunity -> Edit or Create an opportunity and add a word for the field Tags.

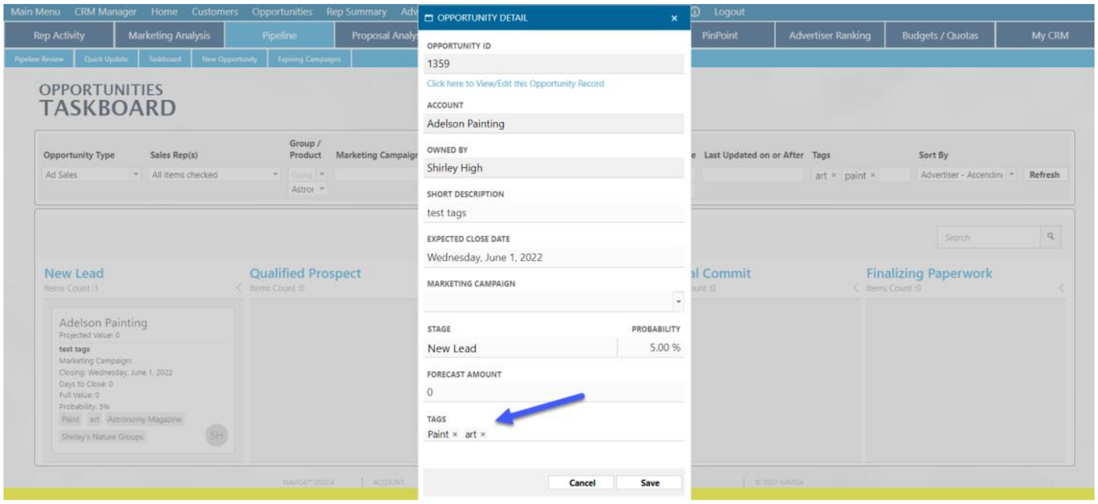


You can enter one or more Tags. Enter the tag and click enter which separates the tags. Save the opportunity.

Navigate to the menu Opportunities -> My Opportunities. Search by the opportunity type, Salesrep and enter the tag(s) and click "Refresh".



Click the opportunity.



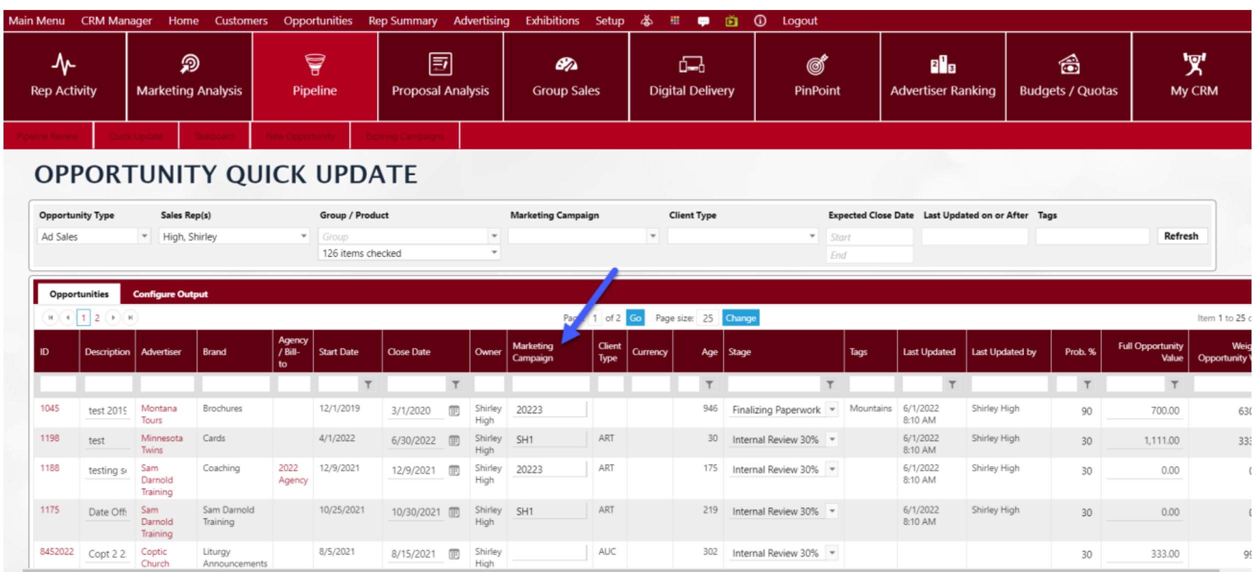
You can edit or enter new tags in this field and click Save.

Note that you can also edit the marketing campaign on the opportunity.

Opportunity Quick Update

Quick Update allows for editing the Marketing Campaign for opportunities.

Navigate to the menu Opportunities -> My Opportunities. Click the "Quick Update" button. Search on the opportunity.

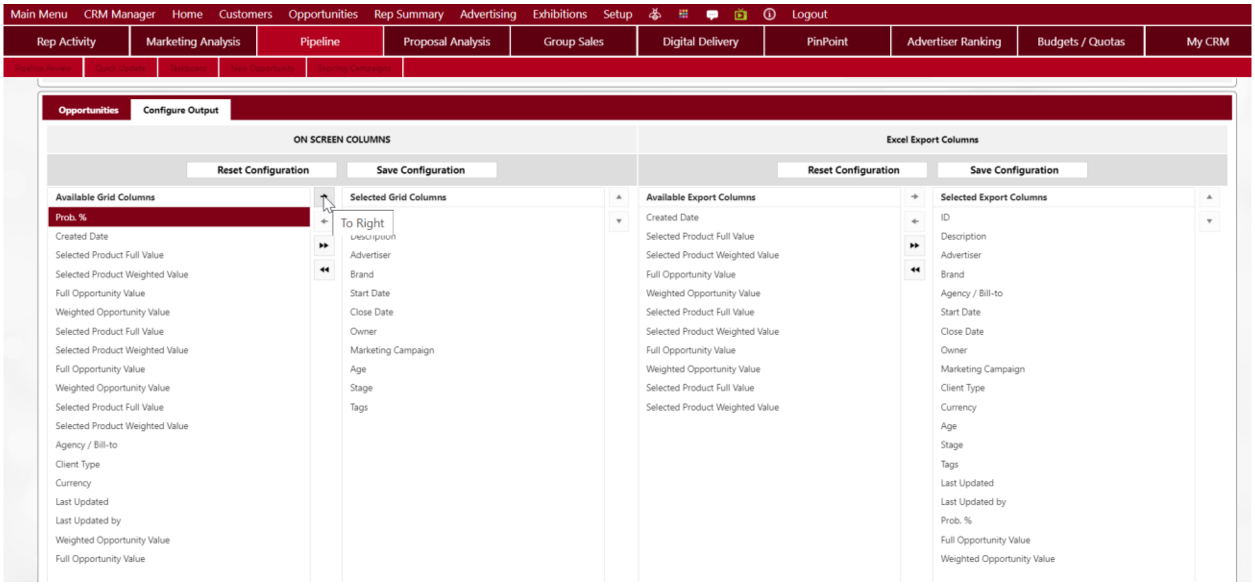


On this screen click the field "Marketing Campaign" and choose one from the drop-down menu. This automatically saves the opportunity with this value.

Opportunities Quick Update Configurable Screen

Opportunities Quick Update allows for configurable fields on screen and export to excel.

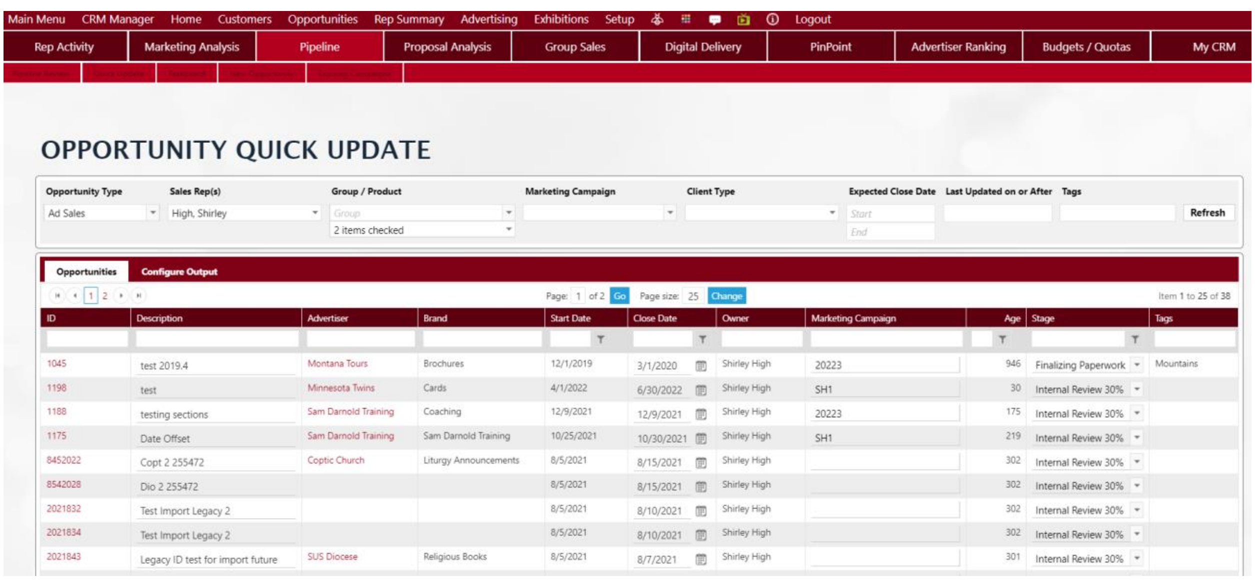
Navigate to the menu Opportunities -> My Opportunities -> Quick Update. Search on the opportunity list by Type, then Group or Product and any other criteria.



Click the tab "Configure Output" and highlight all fields and press CTRL for multiple highlights of the fields you'd like to view on the screen in the "Available Grid Columns". Then click the right facing arrow and they will move to the "Selected Grid Columns". Click Save Configuration.

Repeat for the Excel Export Columns side.

Click the tab "Opportunities" and your data displays.

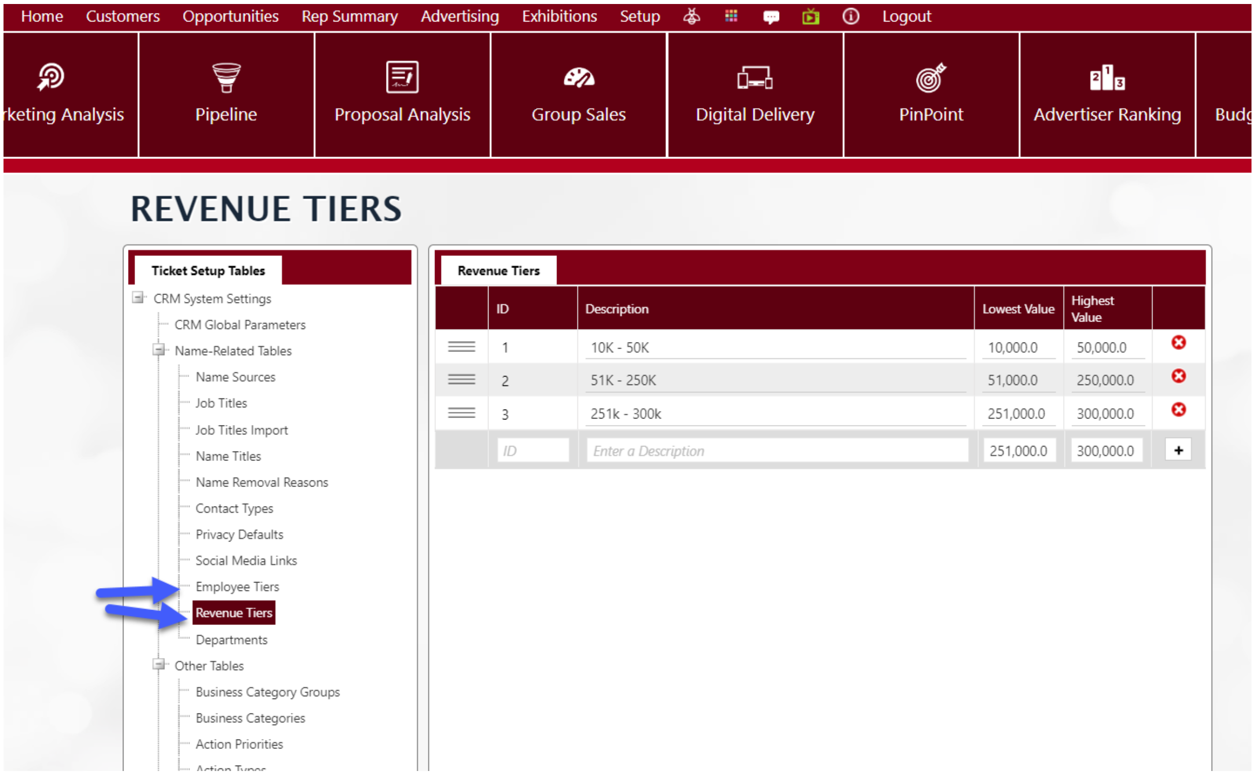


There are hyperlinks to each opportunity and some fields can be changed on this screen directly.

Account Tiers

Added fields for new accounts to indicate employee count, income amounts, primary and secondary industry of the account. This is to allow for categorizing clients within tiers for reporting purposes in Informer.

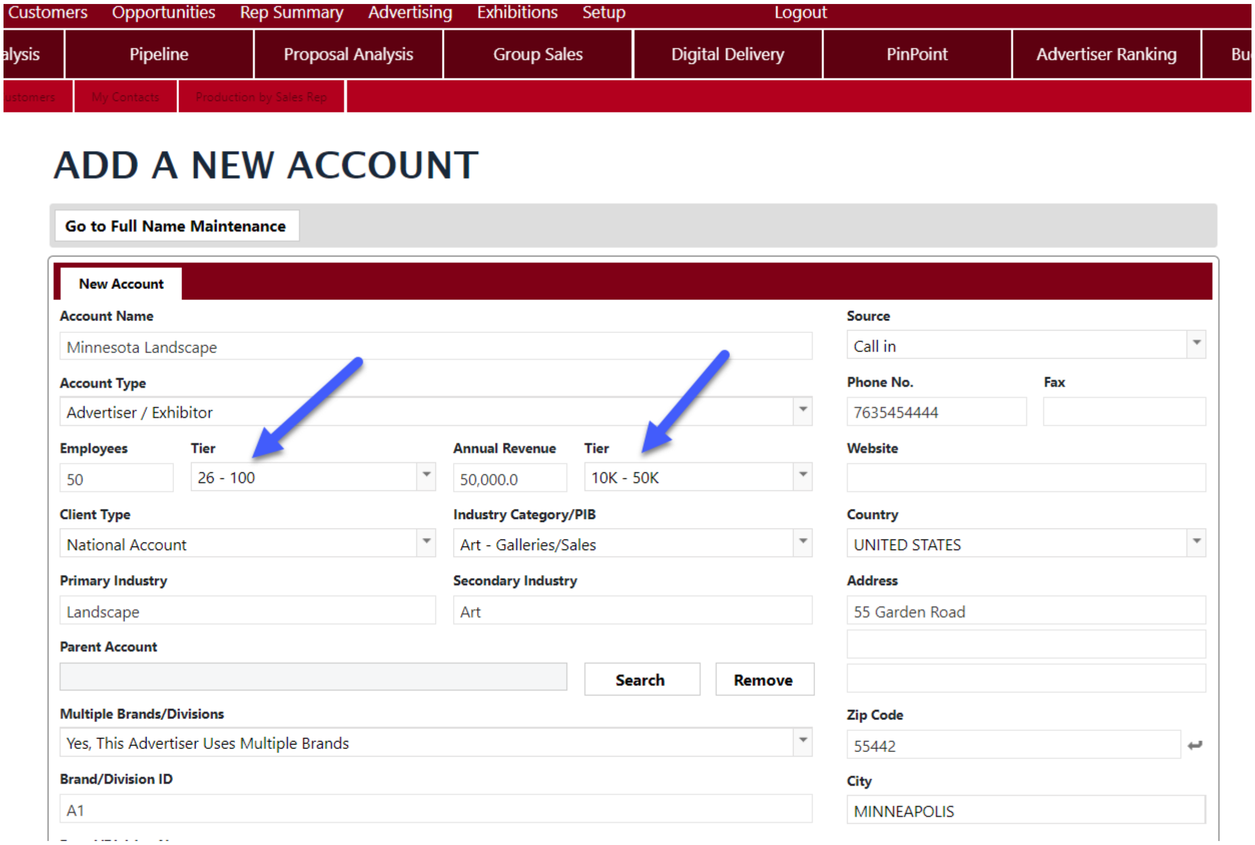
Navigate to the menu Setup -> CRM Settings.



Click on the node Revenue Tier and add an ID, description and lowest and highest value of the revenue of this account. This could be revenue for the company or its employees. Click + to add the new tier and repeat as needed then click save.

Repeat for the Employee Tier.

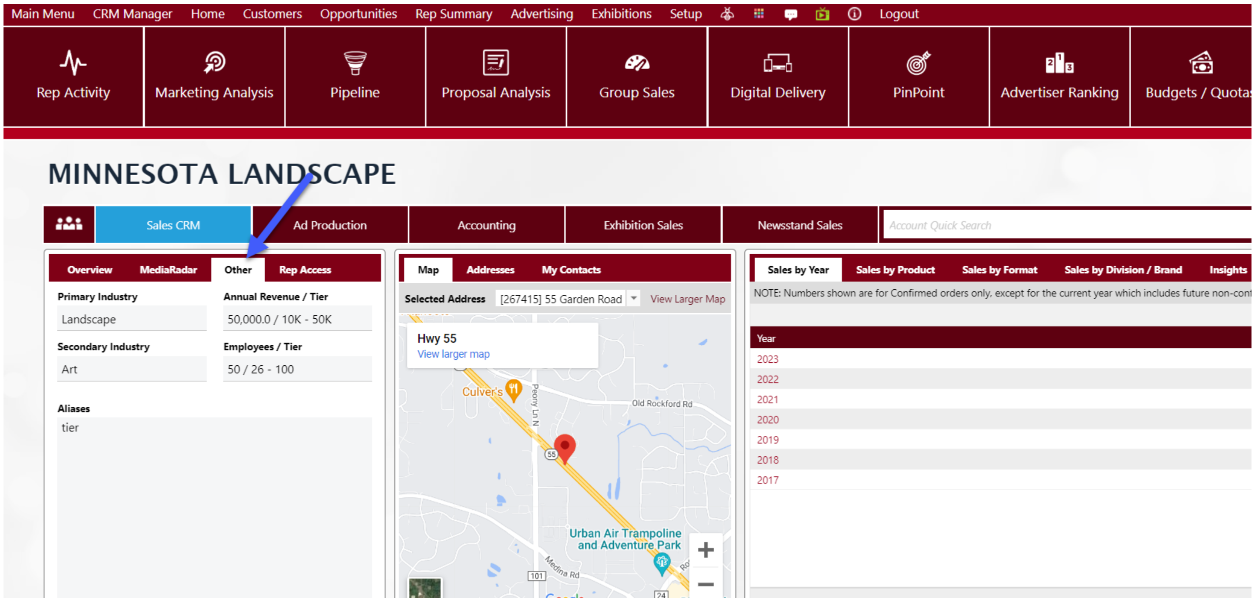
Click the menu Customers -> Add a New Account and enter the header information.



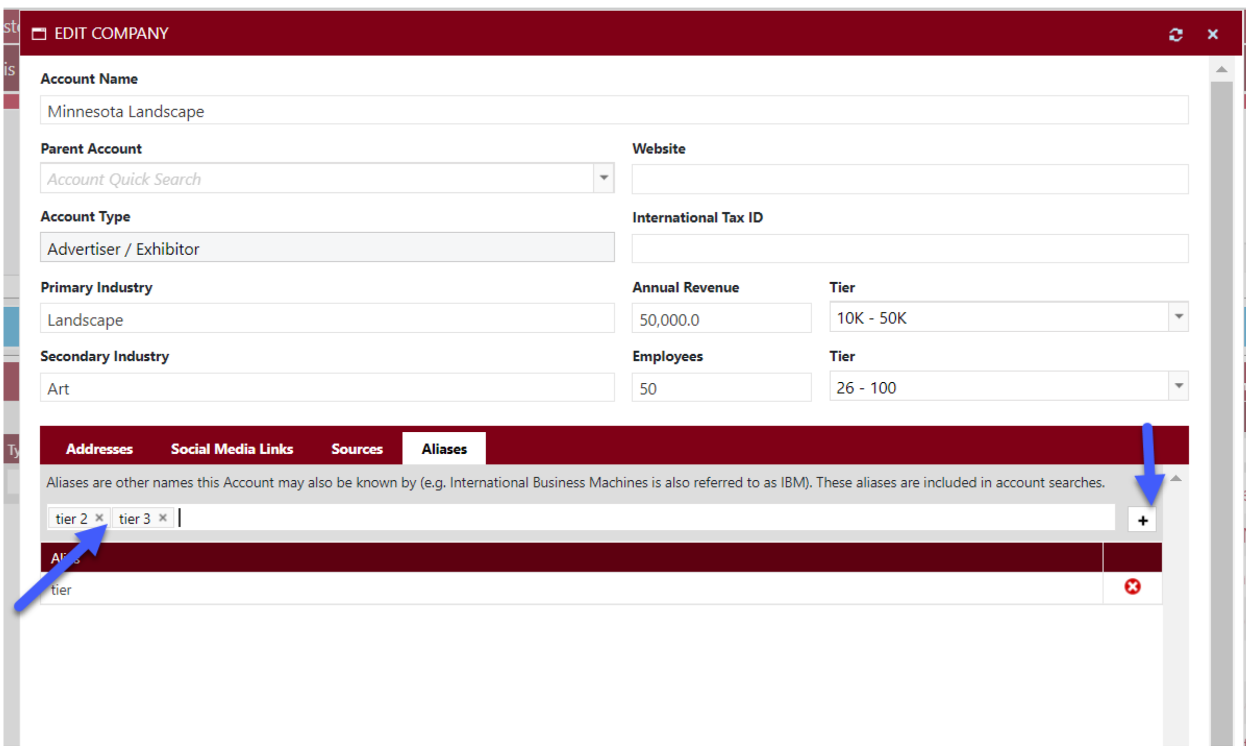
Note that as soon as you enter number of employees in the “Employees” field, the Tier value is automatically selected based on the setup done above. Same for the Annual Revenue field. These are optional fields and can be left blank.

Enter also the Primary and Secondary Industry values in the respective fields to indicate the company industry specialization. These are optional fields.

Navigate to the account overview screen and click the tab “Other”.



These values are displayed in this tab. Click the tab "Edit this Account".



Click the tab Aliases and note that you can enter multiple values separated by pressing enter and then click the + sign and they're all added. The tab "Sources" also allows for multiple value selections.