

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.

Production
Billing
Analysis
Setup
Logout

Product/Group Analysis
Product Analysis
Publication Analysis
Campaign Budget Analysis
Digital Delivery
PinPoint

PRODUCT TAX OVERRIDES

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

Tax Overrides

?
If the Product is Taxable then the Billing process will use the Tax Code on the Clients Record. You can override the Client's Tax Code by setting an override Tax Code for this Product.

Product
Canadian Rockies

Charge Tax
☒ Yes

Tax Overrides

Override Tax Code
Alaska Special Tax - No taxes over \$500

Use the Override Tax Code unless the Client has one of these tax Codes:

Tax Code	Description
-- No Records --	
Tax Code Select a Tax Code	Add

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.

bill-to

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

advertiser

St. George Church
 St. George Church
 12 Bass Lake Rd
 MINNEAPOLIS, MN 55442
 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.

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

MATERIAL MANAGEMENT

Campaign Explorer

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

Material Management

Campaign ID 9613 **Start Date** 3/16/2022
Advertiser St. George Church **End Date** 3/30/2022
Brand St. George Church **Net Amount** 894.00000
Agency
Status Confirmed-Ready to Bill

Material Management

Insertions **Associated Material**

Selected Size 1/4 Page **Consolidate Issue Dates** No

Line ID	Product ID	Product Name	Issue Date	Pick-up Material	Material	Material Status	Invoice ID
25817	SPCAMAG	SPCA Magazine	Thursday, March 17, 2022		test (8422)	New	

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.

The screenshot displays the 'Material Management' interface. At the top, there's a navigation bar with tabs like 'Home', 'Sales Activity', 'Product/Group Analysis', 'Product Analysis', 'Publication Analysis', 'Campaign Budget Analysis', 'Digital Delivery', 'PinPoint', 'Advertiser Ranking', and 'Commissions'. Below this, the 'Material Management' section is active, showing fields for Campaign ID (9831), Advertiser (St. George Church), Brand (St. George Church), Agency, Status (Confirmed-Ready to Bill), Start Date (5/1/2022), End Date (6/30/2022), and Net Amount (2,914,000.00). A confirmation dialog box is overlaid on the screen, stating: 'CONFIRM. This will create a new Material record for this issue date (Monday, May 2, 2022), picking up the previous Material (if present) and assign to all issues forward.' Below the dialog, the 'Associated Material' table is visible, showing two rows of material records. A red arrow points to the 'New' button in the 'Material' column of the first row.

Line ID	Product ID	Product Name	Issue Date	Material	Material Status	Invoice ID
25821	WP	Astronomy Magazine	Monday, May 2, 2022	8429	New	Awaiting New Materials
25825	WP	Astronomy Magazine	Thursday, June 2, 2022	8434	New	Awaiting New Materials

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”.

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

Campaign

Campaign Setup

Line Items

Material Management

Edit CPM Delivery

Campaign Budget

Campaign Production Forms

Digital Serving Analysis

Co-op Billing

User Defined Fields

Notes / Comments

Revenue Allocation

Production Contacts

Tearsheet Contacts

Generate Proposal / Confirmation

Attachments

Invoices & Payments

Rep Commissions

History of Changes

Go to CRM View

Go to Advertiser View

Selected Size1 Page

Consolidate Issue Dates☐ Yes

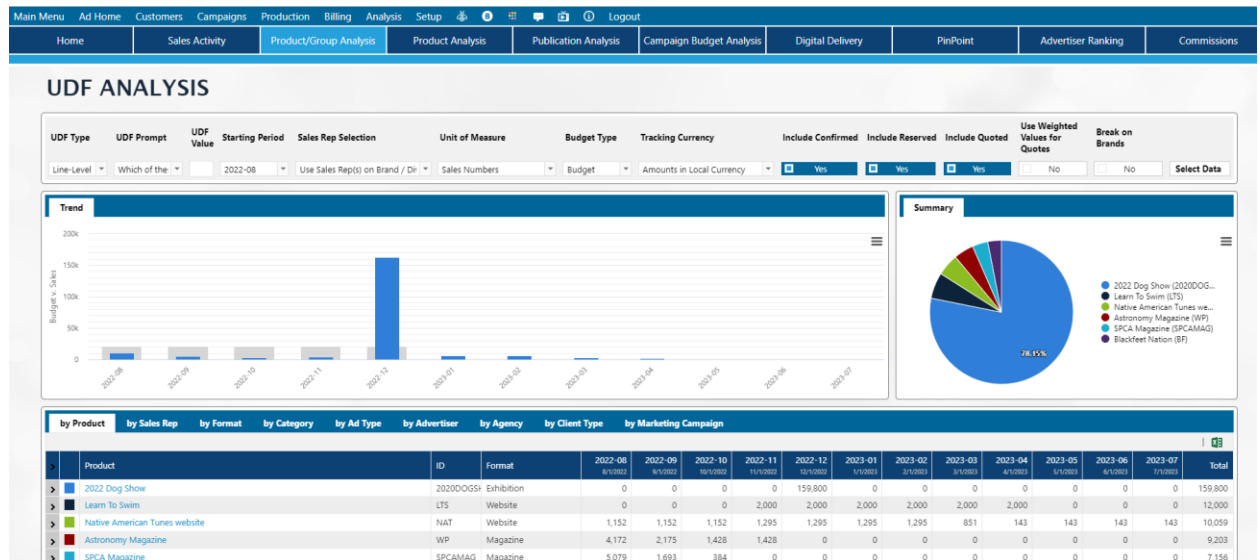
Line ID	Products	Issue Date	Pick-up Material	Material		Invoice ID
18951	Astronomy SH University Pub	Monday, May 2, 2022		Architecture (3540)	New	
18951	Astronomy	Wednesday, May 4, 2022		Image (3541)	New	
18952	SH University Pub	Thursday, May 5, 2022		Image (3541)	New	
18951	Astronomy	Saturday, May 7, 2022		Image (3541)	New	
18951	Astronomy SH University Pub	Monday, May 9, 2022		Image (3541)	New	
18951	Astronomy	Wednesday, May 11, 2022		Image (3541)	New	
18952	SH University Pub	Thursday, May 12, 2022		Image (3541)	New	
18951	Astronomy	Saturday, May 14, 2022		Image (3541)	New	
18951	Astronomy SH University Pub	Monday, May 16, 2022		Image (3541)	New	
18951	Astronomy	Wednesday, May 18, 2022		Image (3541)	New	
18952	SH University Pub	Thursday, May 19, 2022		Image (3541)	New	
18951	Astronomy	Saturday, May 21, 2022		Image (3541)	New	
18951	Astronomy SH University Pub	Monday, May 23, 2022		Image (3541)	New	
18951	Astronomy	Wednesday, May 25, 2022		Image (3541)	New	
18952	SH University Pub	Thursday, May 26, 2022		Image (3541)	New	
18951	Astronomy	Saturday, May 28, 2022		Image (3541)	New	

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.

APPROVAL CODE SETUP
FOR MATERIAL APPROVAL

Approval Code Setup

These codes are used to manage Material Approvals

Sort	Description	Approved	Allow Approval	Line Color	
1	Approval Not Required	☒	☐		
2	Need feedback from Rep and/or Client	☐	☐		
3	In Production	☐	☐		
4	Pending Client Approval	☐	☒		
5	Approved by Client	☒	☐		
6	Rejected by Client	☐	☐		
Enter a New Stage Description		☐	☐		

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.

AD SETUP: PRODUCTION WORKFLOW

Ad Setup

- Ad Setup
 - Production Workflow
 - Stages**
 - Stages - Reminders
 - Master Stages

Production Workflow Stages

Required: Production Stages are used to define the workflow steps required for Advertising, by Product.
E.g. New Material Coming Soon, Pick Up

Product: Astronomy Magazine

Stage No.	Description	Master Stage	Approval Status	Allow in Q/E	Materials Req.	Internal Artist Required	External Artist Required	Line Color
1	Awaiting New Materials	Working with Client (4)	Need feedback from Rep and/or Cle	☒	☐	☐	☐	■
2	Completed	Completed (6)	In Production (7)	☒	☐	☐	☐	■
3	In design	Review the change by controller (8)	Approved by Client (10)	☒	☐	☐	☐	■
4	Extra	Committee Approve (13)	Approved by Client (10)	☒	☐	☐	☐	■

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.

EDITING FLAT FEE LINE: 25837

Line Details
Creatives / Materials
Production Notes
Other Options
User Defined Fields
Category MetaData
Rep Assignments
Affidavits

Product: Astronomy Magazine

Ad Type: Display Advertising

Contract:

Edition(s):

Ratecard: May 20-22 FDFP

Ratecard Line ID: 1340

Description: 1 Page

Lines / Page Eq. 420 1,000

Size: 1 Page (8.5x11)

G/L Type: Print Display

Color:

Section: Display

Position: All

Target Demographic:

Use Edition Splits ☐ No

Pricing per Issue

Ratecard Flat Fee: 777.00000

Adjustments: 0.00000

Adjusted Flat Fee: 777.00000

Total for all Issues

Total Amount: 777.00

Estimated Tax: 0.00

Estimated Total: 777.00

Line Details
Adjustments

Proportion Values: Evenly by Issue

Select Issue Date(s) to add:

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	2 May 2022	☒	777.00	TESTING MATERIAL STATUS (84)						☐

ID

Description

1 Awaiting New Materials

2 Completed

3 In design

4 Extra

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.

External ID	Rate
	111.00000
	777.00000
	400.00000
	4,500.00000
	999.00000
	2,900.00000
	500.87900

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.

NEW FLAT FEE LINE

Line Details

Product: Astronomy Magazine Size: 1 Page (8.5x11) Pricing per Issue

Ad Type: Display Advertising G/L Type: Print Display Ratecard Flat Fee: 777.00000

Contract: Color: Adjustments: 0.00000

Edition(s): Section: Display Adjusted Flat Fee: 777.00000

Ratecard: May 20-22 FDFP Position: All Total for all Issues

Ratecard Line ID: 1340 Target Demographic: Total Amount: 777.00

Description: 1 Page Estimated Tax: 0.00

Lines / Page Eq. 420 1.000 Estimated Total: 777.00

Use Edition Splits: ☐ No

Adjustments

Proportion Values: Evenly by Issue Select Issue Date(s) to add

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	2 May 2022	☒	777.00		1				☐	☒

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.

NEW FLAT FEE LINE

Line Details

Product: Astronomy Magazine Size: 1 Page (8.5x11) Pricing per Issue

Ad Type: Display Advertising G/L Type: Print Display Ratecard Flat Fee: 777.00000

Contract: Color: Adjustments: -78.00000

Edition(s): Section: Display Adjusted Flat Fee: 699.00000

Ratecard: May 20-22 FDFP Position: All Total for all Issues

Ratecard Line ID: 1340 Target Demographic: Total Amount: 2,097.00

Description: 1 Page Estimated Tax: 0.00

Lines / Page Eq. 420 1.000 Estimated Total: 2,097.00

Use Edition Splits: ☐ No

Adjustments

Proportion Values: Evenly by Issue Select Issue Date(s) to add

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	2 May 2022	☒	699.00		1				☐	☒
Thursday	12 May 2022	☒	699.00		1				☐	☒
Monday	23 May 2022	☒	699.00		1				☐	☒

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.

The screenshot shows the 'LINE SETTINGS' window with the 'Rate Escalation' tab selected. The window contains a table for setting override rates based on quantity. Red callouts provide instructions: 1. Click Rate Escalation (pointing to the tab), 2. Click the + to add a line (pointing to the 'Add 1 New Lines' button), 3. Enter the From and Up to Quantity and corresponding Override (pointing to the table rows), and 4. Add another line using the + then enter Up to Quantity. System automatically fills in (pointing to the '+' button).

LINE SETTINGS

Rate Escalation

In the grid below you can enter override rates based on the total quantity entered. This is only used on CPM ad Types.
The Up To Quantity is the total quantity entered on the line.
Note: These rates change the Ratecard Rate directly. They do not create Adjustments.

From Qty	Up To Quantity	Override Rate
0.000	500.000	900.00000
500.001	1,000.000	800.00000

Buttons: Add 1 New Lines, Cancel, Delete, Previous, Next, OK

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.

EDITING COST PER THOUSAND LINE: 25886

Line Details | Creatives / Materials | Production Notes | Other Options | User Defined Fields | Category MetaData | Rep Assignments | Affidavits

Product: SPCA Magazine
Ad Type: Inserts
Contract:
Edition(s):
Ratecard: SPCA DISP
Ratecard Line ID: 1001
Description: Inserts
Lines / Page Eq.: 420 / 1,000

Other Options
Size:
G/L Type: Print Display
Color:
Section: Display
Position: Display Position
Target Demographic:

Rep Assignments
Pricing per Issue
Ratecard Rate: 900.00000
Rate Adjustments: 0.00000
Discount Rate: 900.00000
Quantity: 500
Rate per Insertion: 450.00000
Rate x Qty Adjustments: 0.00000
Price per Insertion: 450.00
Total for all Issues
Billing Total Imps.: 500
Billing Total Amt: 450.00
Estimated Tax: 0.00
Estimated Total: 450.00

Line Details | Zones | Adjustments

Proportion Values: Evenly by Issue
Select Issue Date(s) to add: +

Day	Issue Date	Available	Billing Imps.	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	2 May 2022		500	450.00							

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.

BOOKING WIZARD

Product Selection | Category MetaData | Material | Adjustments | Price Breakdown | Book & Pay

Affidavits

Start Date: Sunday, May 1, 2022

Copies	Contact	Address
1	Bob Smith	23 Agency Road Minneapolis MN 55444

Update

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.

NEW ADVERTISER

Company Setup Employees

New Record Type
Company (Advertiser)

Account Name
No Brand 2

Client Type
National Account

Multiple Brands
No, This Advertiser Uses One Brand

Agency ID
Agency Name
Search

Billing Currency

International Tax ID

Sales Rep
Cheryl Strayed

Product Group(s)
Nature Pubs and Digital (NATS)

Phone No.
(800)765-4444

Mobile
Fax

Website

Email

Country
UNITED STATES

Address
No Brands Avenue

Postal Code
78766

City
AUSTIN

State
TEXAS

Validate Address Cancel Create New Account

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”.

Channel Privacy Preferences

Attachments

Cards on File

Account Alerts

History of Changes

Territory

Account Opened 4/25/2022

Last Updated

Transient Record ☐ No Set this flag to 'Yes' if this is the generic, umbrella account you want to post all Classified Self Service orders to. Do **NOT** set this flag for regular private party advertisers.

Display Orders for this transient account record in production system ☐ No

Is this an Agency ☐ No

Use Multiple Brands ☐ No [Go to Brand Details](#)

Pay Sales Rep Commissions on Paid Invoices Only ☐ No

Client Type

Pre-Payment Required Pre-Payment Required

Auto Apply Cash on Account when Campaign is Confirmed ☐ No

Default Invoice Form Detail Level Show Each Line - Including Costs

More Information

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".

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 Commission

LIST OF IMPORTED CAMPAIGNS

Campaign Import

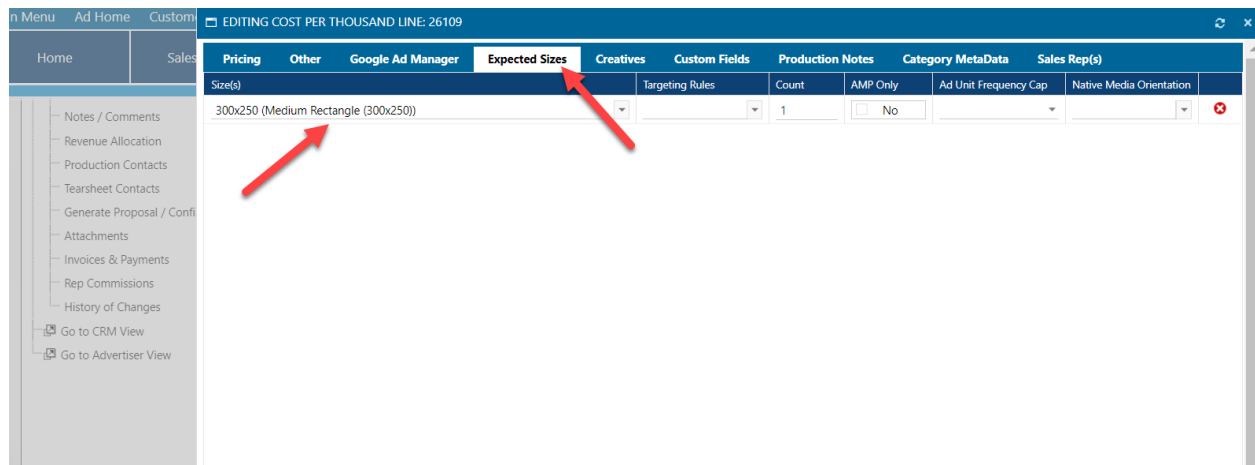
- Campaign Import
 - Import Issue Orders
 - Import Campaigns
 - List of Imported Campaigns

Imported Campaigns

Import ID: 186 [Get Campaigns](#)

Campaign ID	Description	Type	Product Group	Advertiser	Brand	Start Date	End Date	Rep(s)	Status	Currency ID	Net Amount
9962	Expected Sizes import	M	Shirley's Nature Groups (Please do not change settings)	J.W.Schultz	Artifacts	1/1/2022	1/10/2022	SHIGH	IS		1.00

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

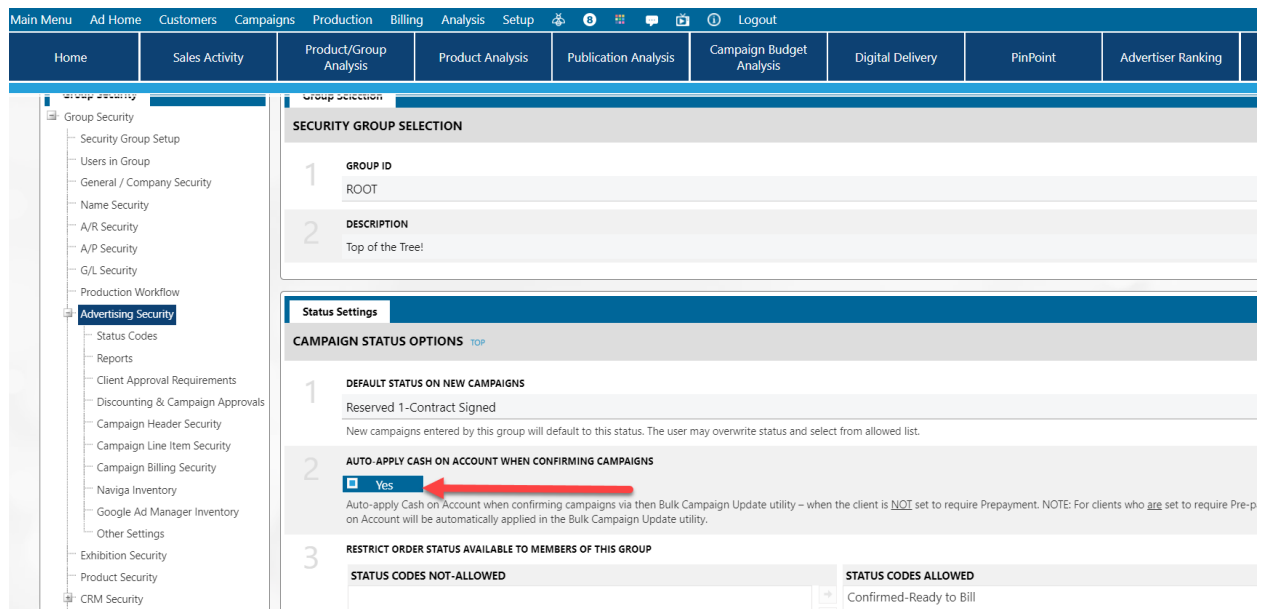


The “Expected Sizes” tab now includes the size you imported in the template.

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.

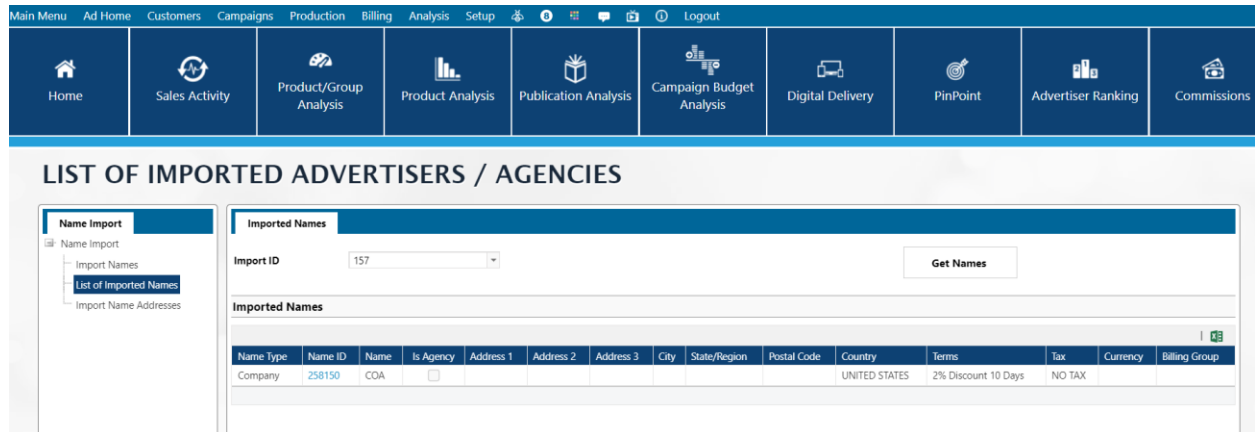


Scroll to the Status Settings section and check the flag for “Auto Apply Cash on Account When Confirming Campaigns”. Save the settings using the save button.

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.



The screenshot shows the 'LIST OF IMPORTED ADVERTISERS / AGENCIES' page. On the left is a sidebar with a tree view under 'Name Import' containing 'Import Names', 'List of Imported Names' (highlighted), and 'Import Name Addresses'. The main content area has a header 'Imported Names' and an 'Import ID' dropdown set to '157' with a 'Get Names' button. Below this is a table of imported names.

Name Type	Name ID	Name	Is Agency	Address 1	Address 2	Address 3	City	State/Region	Postal Code	Country	Terms	Tax	Currency	Billing Group
Company	Z58150	COA	☐							UNITED STATES	2% Discount 10 Days	NO TAX		

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.

Editing Campaign 9966

Campaign Explorer

- Campaign
- Campaign Setup
- Line Items
- Material Management
- Edit CPM Delivery
- Campaign Budget
- Campaign Production Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts
- Tearsheet Contacts
- Generate Proposal / Confirmation
- Attachments
- Invoices & Payments
- Rep Commissions
- History of Changes
- Go to CRM View
- Go to Advertiser View

Campaign Setup

Campaign ID

Campaign Billing Type

Campaign Description

Advertiser ID

Advertiser Name

Advertiser Address

Brand

Agency / Bill-to

Billing Contact

Billing Address

Product Group

Order Contact

CHANGE CAMPAIGN STATUS

Current Status: Reserved 1-Contract Signed

New Status: Reserved 1-Contract Signed

CAMPAIGN STATUS MESSAGES

Type	Message
-- No Messages --	

CASH ON ACCOUNT

Pre-Payment Required: No

Balance Due: 777.00

ID	Date	Amount
255488*2396.AUTO	8/6/2021	6,236.38
255488*2397.AUTO	8/6/2021	5,325.00
255488*20224141	4/14/2022	325.00

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Dig

CLASSIFIED PACKAGE SETUP

Category Setup

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

Classified Package Setup

Category Tree: Help Wanted

Package ID: HW

Description: Help Wanted

Order Entry Message:

Product Group: Nature Pubs and Digital

Template: Help

Valid From: 12/7/2020

Valid Through: 12/31/2022

Fiat Fee Package: ☐ No

Fiat Fee Amount:

Prompt for Product Selection: ☒ Yes

Minimum Product Selection Allowed:

Prompt for Package Multiplier: ☒ Yes

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.

Ad Home Customers

BOOKING WIZARD

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

Start Date: Sunday, May 15, 2022

Select a Category Tree: Help Wanted

Select a Category: Help Wanted

Affidavits

Product: -- No Records --

Select a Package [this will first clear the grid]: Help Wanted (HW)

or Select Product(s):

PACKAGE OPTIONS

PRODUCT SELECTION

Select at least 1 product(s)

Toggle Select All

☒ Astronomy (AST)

☒ SPCA Magazine (SPCA)

☒ SH University Pub (SHU)

PACKAGE MULTIPLIER (CYCLE COUNT): 1

Cancel Apply

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.

The screenshot shows the 'Ticket Teams' setup screen. At the top is a navigation bar with various menu items. Below it, the 'TICKET TEAMS' section is active. On the left, a sidebar lists 'Ticket Setup Tables' including 'Campaign Tickets Setup', 'Ticket Teams' (selected), 'Master Ticket Status Codes', 'Ticket Status Code Groups', 'Ticket Types', 'Ticket Priorities', and 'Ticket Workflow Routing'. The main area is titled 'Ticket Team' and contains a 'Team ID' dropdown set to 'SH' with a 'New' button. Below this is a 'Team Name' text field containing 'Shirley Team'. A 'Team Members' table lists three members: CSTRAYED (Cheryl Strayed), SHIGH (Shirley High), and SK (Scott Kersey). Each member has a red 'X' icon in the right margin. At the bottom of the table is a dropdown menu and a '+' button to add more members.

ID	Name
CSTRAYED	Cheryl Strayed
SHIGH	Shirley High
SK	Scott Kersey

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.



TICKET STATUS GROUP SETUP

Sort	ID	Description	Master Status	Color	Completed	Inactive
1	1	Started 1	Open (OPEN)		☐	☐
2	2	Done	Approved (APPROVE)		☒	☐
					☐	☐

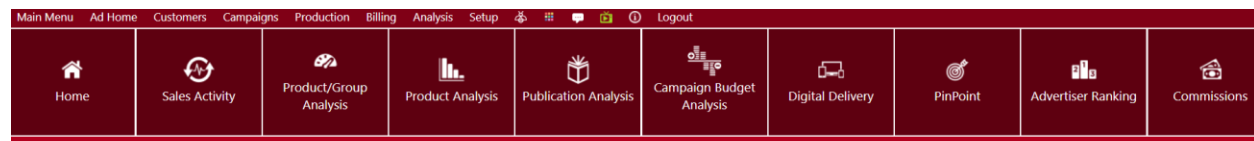
Click the New button to create a new Ticket Status Group. Enter an ID and Description for the group.

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.



TICKET WORKFLOW ROUTING

Is User Selectable	ID	Name	Route to Type	Route to	Route to Team
☒	1	Open	Assigned User and/or Team		Financial Shirley Team
☒	2	Under Review	Assigned User and/or Team	Lea High (lea)	Financial Shirley Team
☒	3	Completed	Ticket Owner and/or 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 screenshot shows a software interface for creating a new ticket. The top navigation bar includes 'Main Menu', 'Ad Home', 'Customers', and 'Campaigns'. The left sidebar lists various campaign-related tasks. The main form area is titled 'NEW TICKET FOR CAMPAIGN 7956'. It contains several dropdown menus for 'Ticket Type', 'Priority', 'Status', 'Assigned Team', and 'Assigned User'. Below these are fields for 'Short Description', 'Team Owner', and 'User Owner'. The 'Long Description' field is a rich text editor with a toolbar and contains the text 'Please check the dates on this request. Image is included below for your review. Please see the image and review the details attached. Documents are attached.' followed by an image of an eagle with an American flag. The bottom of the form has a tabbed interface with 'Notes' selected, and other tabs for 'Regarding Line Items', '(Other) Line Items', 'History of Changes', and 'Attachments'.

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”.

File Name	File Type	Description	User	Date/Time	Delete
Us_flag_large_38_stars.png	png		Shirley High	Wednesday, April 27, 2022	✕
CairoAbbasiyaMarkEntrance.jpg	jpg		Shirley High	Wednesday, April 27, 2022	✕
Artemis_I_Orion_October_12__2020.jpg	jpg		Shirley High	Wednesday, April 27, 2022	✕
Opportunity dates.docx	docx	test	shigh	Wednesday, April 27, 2022	✕

Cancel Save

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”.

TICKET 17 FOR CAMPAIGN 7956

Ticket Type: Operational | Priority: Critical | Status: Open | Assigned Team: Shirley Operational Team | Assigned User:

Short Description: Ticket #2 | Team Owner: | User Owner:

Long Description: Ticket #2 | 2 WORDS

Notes | Regarding Line Items | (Other) Line Items | History of Changes | Attachments

Add a Note

Note

-- No Records Returned --

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.

AUTO PRICE ADJUSTMENTS

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

Auto Price Adjustments

About Auto Adjustments

Auto Adjustments are used to automatically insert one or more adjustments on a line when a Specific Ratecard and Rateline are selected. NOTE: If you add an Auto Adjustment Rule here - it will still follow the Ad Type, Currency and other limitations set on the Adjustment code. This means that if you set ABC as an Auto Adjustment - and ABC only applies to Flat Fee Ad Types in USD currency - this auto adjustment will not be inserted if those additional requirements are not met in Order Entry.

Product

Astronomy

Ratecard

AST Import Template (992)

Ratecard Line

1 Page

Auto Price Adjustments

Adjustment ID	Description	Ad Type IDs	Currency ID	Adjustment Type	Adjustment Amount	Allow Delete
-- No Records Returned --						
Manager Discount						
Type here to filter/search						
Manager Discount						

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.

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

Product Listing

Product Details

Material Handling

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G/L Overrides

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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

About Auto Adjustments

Auto Adjustments are used to automatically insert one or more adjustments on a line when a Specific Ratecard and Rateline are selected. NOTE: If you add an Auto Adjustment Rule here - it will still follow the Ad Type, Currency and other limitations set on the Adjustment code. This means that if you set ABC as an Auto Adjustment - and ABC only applies to Flat Fee Ad Types in USD currency - this auto adjustment will not be inserted if those additional requirements are not met in Order Entry.

Product

Astronomy

Ratecard

Astronomy (100)

Ratecard Line

1 Page

Auto Price Adjustments

Adjustment ID	Description	Ad Type IDs	Currency ID	Adjustment Type	Adjustment Amount	Allow Delete
2	Manager Discount	NDISP;PCLABCEDEF		Amount	-1.00	☒

Add Adjustments

CONFIRM

Would you like to copy these Auto Adjustments to other Lines on this Ratecard? WARNING: This will overwrite any adjustments on the selected rate lines.

OK

Cancel

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.

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.

The screenshot displays the 'Status Settings' page within the 'Advertising Security' section. The left sidebar lists various security settings, with 'Status Codes' highlighted. The main content area is divided into four numbered sections:

- DEFAULT STATUS ON NEW CAMPAIGNS**: Set to 'Proposal'. Description: 'New campaigns entered by this group will default to this status. The user may overwrite status and select from allowed list.'
- DEFAULT STATUS ON NEW CAMPAIGNS WHEN PRE-PAYMENT IS REQUIRED**: Set to 'Reserved 3 - inventory reserved in GAM'. Description: 'If prepayment is required, the Confirmed status is not immediately available when creating a new campaign. In this scenario, Campaign Entry will default to the first available Status Code. Setting this option will default, selecting this status code when prepayment is required and Confirmed status is not yet allowed.'
- AUTO-APPLY CASH ON ACCOUNT WHEN CONFIRMING CAMPAIGNS**: Set to 'No'. Description: 'Auto-apply Cash on Account when confirming campaigns via then Bulk Campaign Update utility – when the client is NOT set to require Prepayment. NOTE: For clients who are set to require Pre-payments, Cash be automatically applied in the Bulk Campaign Update utility.'
- RESTRICT ORDER STATUS AVAILABLE TO MEMBERS OF THIS GROUP**:
 - STATUS CODES NOT-ALLOWED**: (Empty list)
 - STATUS CODES ALLOWED**:
 - Cancelled (Credited)
 - Confirmed
 - Deleted
 - Invoicing Started
 - Negotiated Price
 - Proposal
 - Reserved 1 - not sent to GAM
 - Reserved 3 - inventory reserved in GAM

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”.

History of Changes

Last Updated: 5/3/2022

Transient Record: ☐ No Set this flag to Yes if this is the generic, umbrella account you want to post all Classified Self Service orders to. Do NOT set this flag for regular private party advertisers.

Display Orders for this transient account record in production system: ☐ No

Is this an Agency: ☐ No

Use Multiple Brands: ☒ Yes

Pay Sales Rep Commissions on Paid Invoices Only: ☐ No

Client Type: Private Party

Pre-Payment Required: Pre-Payment Required

Auto Apply Cash on Account when Campaign is Confirmed: ☐ No

Default Invoice Form Detail Level: Show Each Line - Including Costs

More Information

Bill-to ID: 255073

Bill-to Name: Super Tutor

Charge Credit Card: ☐ No

Save the settings.

Navigate to create a new campaign for this advertiser.

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

Agency / Bill-to:

View Credit Status

Billing Contact: Oscar K. Madison

Billing Address: Super Tutor
99 Benedict Avenue
SOUTH SALEM, NY 10590
Tel: (914)333-7777

Product Group: Nature Pubs and Digital

Order Contact:

Production Controller: Shirley High

Campaign Manager:

Default Discount %: 0.00

Auto Payment Method: Select Auto Payment Method

Manage Cards on File

Default Contract:

Payment Terms (Default): NET 30 DAYS

Status: Reserved 3 - inventory reserved in GAM

Marketing Campaign:

Industry Code: Fashion - Accessories

P.O. Number:

Customer Ref. No.:

External Campaign ID:

Invoice/Form Detail Level: Show Each Line - Including Costs

Marketing Content Template:

Cancel Save

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.

The screenshot displays the 'BOOKING WIZARD' interface. On the left is a navigation menu with options like 'Home', 'Sales Activity', 'Co-op Billing', 'User Defined Fields', 'Notes / Comments', 'Revenue Allocation', 'Production Contacts', 'Tearsheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', 'History of Changes', 'Go to CRM View', and 'Go to Advertiser View'. The main area is divided into several sections: 'Material Type' (Listing Text), 'Pick-up Material', 'Approval Status', 'Columns' (6 Column (ECOL)), 'Ad Headline' (testing fonts), 'Sort Text' (TESTINGFONT), and an 'Override' checkbox. Below these is a rich text editor with a toolbar containing options for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and no border. The text 'testing font' is entered in the editor, and a font dropdown menu is open, showing options for 8pt, 11pt, and 18pt. A purple arrow points to the 18pt option. To the right of the editor is a large preview area showing the text 'testing font' in a light gray box. At the bottom right, there is an 'INSERTION PREVIEW STATS' table.

INSERTION PREVIEW STATS			
Lines	2.632 agate lines	1 text lines	
Height	0.188 in	0.478 cm	13.5 pt 18.048 px
Width	2 in	5.08 cm	144 pt 192 px
Other	2 words		12 characters

Below the stats table are two buttons: 'Download Image' and 'Download PDF'. At the very bottom of the wizard are 'Previous' and 'Next' buttons.

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.

Credit Control Payments Reporting Setup Logout

A/R SYSTEM PARAMETERS

A/R Module Settings

Period Control

First Open Financial Period: 2021-06

Last Open Financial Period: 2022-09

Enforce Date Within Open Financial Period: ☐ No

A/R Parameters

Service Charge Percent: 10.00

Service Charge Class: TEST CLASS CODE

DSO Calculation Method: Media Credit Association

Foreign Currency Indicator: Allow a Client to be Billed in Multiple Currencies

Statement / Invoice Date Format (for Fabssoft forms): DD MMM YYYY

Allowed From Addresses for Customer Service / Collection Emails: CustomerService@msgl.com, wayne.burrows@navigaglobal.com

Custom Program to run when posting to A/R:

Service Charge Class Per Company

Company	Service Charge Class	Service Charge Class %
-- No Service Charge Class Per Company Set --		

Set the “Last Open Financial Period” and save the settings.

Navigate to the AD menu Campaigns -> Change Issue Date

Main Menu Customers Invoices Credit Control Payments Reporting Setup Logout

CHANGE ISSUE DATE

Selected Product: Astronomy Issue: 5/11/2022 Get Orders

Orders in Issue

ID	Campaign	Advertiser ID	Advertiser	Brand	Agency ID	Agency	Material Status
18744.2	7868	255243	Minnesota Twins	Cards			
18951.5	7961	256368	Alaska Fishing	Glacier Tours	255023	Shirley's Agency	

CHANGE ISSUE DATE

Notes: - for Confirm process may cause an up - If using N/A be re-sent

New Issue Date: 2022-09

New Issue Period: 2022-06

Cancel Save Changes

Change Issue

NAVIGA™ 2022.3 Build: 220510.0215 ACCOUNT: DIGITAL20223 YOU ARE LOGGED IN AS: Shirley High (shigh) SECURITY GROUP: ROOT LANGUAGE: English (en-US) (Browser Default) © 2022 NAVIGA All Rights Reserved

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”.

The screenshot shows the 'System Parameters' setup screen. The top navigation bar includes 'Campaigns', 'Production', 'Billing', 'Analysis', 'Setup', and 'Logout'. Below this is a sub-navigation bar with 'Product/Group Analysis', 'Product Analysis', 'Publication Analysis', 'Campaign Budget Analysis', 'Digital Delivery', and 'PinPoint'. The main content area is titled 'Email Invoice Body' and contains a text editor with a sample invoice message. Below the editor are several settings with checkboxes:

- Create a separate Invoice Batch for each Product Group: ☒ Yes
- Separate G/L Posting for each issue/month billed on an invoice: ☐ No
- Derive Period from End Date: ☒ Yes
- Use Separate Counter for Credits: ☒ Yes
- Calculate early pay discount before taxes: ☒ Yes
- Use G/L Type Override First: ☒ Yes (highlighted with a red arrow)

Below these settings is the 'Material Settings' section with two options:

- Option to Create Copy of Material when Attaching to Order: ☒ Yes
- Consolidate New Material Records by Size: ☐ No

The bottom section is titled 'Sales Rep Settings'.

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.

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

G/L Defaults

Receivables G/L Code: 01*00*0000*00*0148 ACCOUNTS RECEIVABLE

Revenue G/L Code: 01*00*0002*00*0000 WEBSITE REVENUE

Agency Comm. G/L Code: 01*00*0007*00*0000 Agency Commission

G/L Type Overrides

ID	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name	
DISP	01*00*0003*00*0004	Lead Generation Revenue	01*11*5010*61*2510	Commissions - Agency	✖
G/L Type	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name	
Select	Select a Specific G/L Acc		Select a Specific G/L Acc		+

Industry Code Overrides

ID	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name	
Art	01*00*0000*88*3700	DIGITAL BANNER REVENUE	01*20*2500*50*1200	Agency Commission	✖
Industry Code	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name	
Select	Select a Specific G/L Acc		Select a Specific G/L Acc		+

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.

[Campaigns](#)
[Production](#)
[Billing](#)
[Analysis](#)
[Setup](#)
[Logout](#)

[Product/Group Analysis](#)
[Product Analysis](#)
[Publication Analysis](#)
[Campaign Budget Analysis](#)
[Digital Delivery](#)
[PinPoint](#)

Attachments

Other Details

Payment Details - Local Currency [Foreign Currency](#)

Payment / Check ID	Applied Date	Applied Period	Payment Amount	Discount	Write-Off
-- No Records --					

G/L Details - Local Currency [Foreign Currency](#)

G/L Code	G/L Description	Debit Amount	Credit Amount
01*00*0000*00*0148	ACCOUNTS RECEIVABLE	738.15	0.00
01*00*0003*00*0004	Lead Generation Revenue	0.00	777.00
01*11*5010*61*2510	Commissions - Agency	38.85	0.00

Order Details

ID	Module	Product	MM Contract
10070	INET	Shirley's Nature Groups (Please do not change settings)	

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”.

[Campaigns](#)
[Production](#)
[Billing](#)
[Analysis](#)
[Setup](#)
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[Product/Group Analysis](#)
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[Campaign Budget Analysis](#)
[Digital Delivery](#)

Payment in full is due by [#DUPLICATE#](#)

[Design](#) [HTML](#)

Create a separate Invoice Batch for each Product Group ☒ Yes

Separate G/L Posting for each issue/month billed on an invoice ☐ No

Derive Period from End Date ☒ Yes

Use Separate Counter for Credits ☒ Yes

Calculate early pay discount before taxes ☒ Yes

Use G/L Type Override First ☐ No

Material Settings

Option to Create Copy of Material when Attaching to Order ☒ Yes

Consolidate New Material Records by Size ☐ No

Sales Rep Settings

Rep. Commissions - Post Zero Amounts ☒ Yes

Rep. Commissions - Show Rep Amounts ☒ Yes

Inventory Settings

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/externalform_logo_USA.jpg Dynamic Logo Insertion

bill-to Adelson Painting ATTN: Jimmy Adleson 87 Painting Road MINNEAPOLIS, MN 55442 Account No: 255342	advertiser 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 <table border="1"> <thead> <tr> <th></th> <th>US DOLLARS (INACTIVE)</th> </tr> </thead> <tbody> <tr> <td>Currency</td> <td></td> </tr> <tr> <td>Gross Amount</td> <td>777.00</td> </tr> <tr> <td>Agency Commission</td> <td>0.00</td> </tr> <tr> <td>Net Amount</td> <td>777.00</td> </tr> <tr> <td>Invoice Tax Amount: GST 5%</td> <td>38.85</td> </tr> <tr> <td>Invoice Tax Amount: 5 % TAX</td> <td>38.85</td> </tr> <tr> <td>Pre-Paid Amount</td> <td>0.00</td> </tr> <tr> <td>Payment Amount Due</td> <td>\$ 854.70</td> </tr> <tr> <td>Payment Due Date</td> <td>6/11/2022</td> </tr> <tr> <td>Discount if Paid by 5/22/2022</td> <td>15.54</td> </tr> </tbody> </table>		US DOLLARS (INACTIVE)	Currency		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
	US DOLLARS (INACTIVE)																						
Currency																							
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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.

[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](#)

EDITING CAMPAIGN 8017

[-- Select an Edit Option --](#)

Campaign Explorer

- Campaign
 - Campaign Setup**
 - Line Items
 - Material Management
 - Edit CPM Delivery
 - Campaign Budget
 - Campaign Production Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts
 - Tearsheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes
 - Go to CRM View
 - Go to Advertiser View

Campaign Setup

Other Information

Campaign ID: 8017
 Campaign Billing Type: Performance Campaign
 Campaign Description:
 Advertiser ID: 255508
 Advertiser Name: University of Iowa
 Advertiser Address: 33 university Avenue, IOWA CITY, IA 52240, Tel: (763)454-3333
 Brand: Undergrad
 Agency / Bill-to:
 Billing Contact: Ingy Aatef
 Billing Address: 33 university Avenue, IOWA CITY, IA 52240, Tel: (763)454-3333
 Product Group: Nature Pubs and Digital
 Order Contact: Ingy Aatef
 Production Controller: Shirley High

Start Date: 6/1/2022
 End Date: 6/30/2022
 Run until cancel: No
 Gross Amount: 1,299.10
 Commission Amount: 0.00
 Net Amount: 1,299.10
 Estimated Tax: 0.00
 Estimated Total: 1,299.10
 Currency: Use System Default
 Default Discount %: 0.00
 Auto Payment Method:
 Manage Cards on File:
 Default Contract: University of Iowa Contract
 Payment Terms: NET 20
 Status: Proposal
 Marketing Campaign:
 Industry Code: Art - Galleries/Sales
 P/I Number:

[View Credit Status](#)

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

[Main Menu](#)
[Ad Home](#)
[Customers](#)
[Campaigns](#)
[Production](#)
[Billing](#)
[Analysis](#)
[Setup](#)
[Logout](#)

[Home](#)
[Sales Activity](#)

EDITING FLAT FEE LINE: 19026

[Line Details](#)
[Creatives / Materials](#)
[Production Notes](#)
[Other Options](#)
[User Defined Fields](#)
[Category MetaData](#)
[Rep Assignments](#)
[Affidavits](#)

Campaign Explorer

- Campaign
 - Campaign Setup**
 - Line Items**
 - Material Management
 - Edit CPM Delivery
 - Campaign Budget
 - Campaign Production Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts
 - Tearsheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes
 - Go to CRM View
 - Go to Advertiser View

Product: SPCA Magazine
 Ad Type: Display Advertising
 Contract: [View Contract](#)
 Editions: 13
 Ratecard Line ID: 891
 Description: Display
 Lines / Page Eq: 420 / 1.000

Size: 1/2 Page (4x5.5)
 G/L Type: Print Display
 Color:
 Start Date: 5/1/2022
 End Date: 6/30/2022
 Frequency Commitment: 5
 Target Demographic:

Pricing per Issue
 Ratecard Flat Fee: 400.00000
 Adjustments: 0.00000
 Adjusted Flat Fee: 400.00000
Total for all Issues
 Total Amount: 400.00
 Estimated Tax: 0.00
 Estimated Total: 400.00

Line Details
Zones
Adjustments

Proportion Values: Evenly by Issue
 Select Issue Date(s) to add:

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Wednesday	1 June 2022	☒	400.00						☐	☒

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

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.

Menu

Customers

Invoices

Credit Control

Payments

Reporting

Setup

Logout

Go to Account Setup

Add a Contacted Note

Add an Internal Note

Apply a Credit

Enter a Check Payment

Enter a Credit Card Payment

OPEN INVOICE AGING

	0-30	31-60	61-90	91-120	121+	COA	Pre-Payments	Balance
By Due Date	310.00	999.00	6,096.00	---	28,195.11	-11,561.38	-31,481.81	-7,443.08
By Invoice Date	310.00	---	999.00	6,096.00	28,195.11			

View by Currency

Open Invoices

Paid Invoices

Transferred Invoices

Payments

Card Transactions

Statements

View All Open Invoices

Email Selected Documents

ID	Date	Age by Inv. Date	Age by Due Date	Brand	Reference	Amount	Balance	Disputed	Pay	View PDF	
		T	T	T		T	T	☐	T		
SH1516458T	4/16/2021	363	333	St. George Church	Shirley's Nature Groups (Please do not change settings) - P.O. 787878	10,675.00	10,675.00	No	\$		
SH1516459T	4/16/2021	363	333	St. George Church	Shirley's Nature Groups (Please do not change settings) - P.O. 9899 - test forms	2.36	2.36	No	\$		
SH1516460T	4/16/2021	363	333	St. George Church	Shirley's Nature Groups (Please do not change settings) - Campaign test for packages	5.25	5.25	No	\$		
SH1516468T	4/19/2021	360	330	St. George Church	Shirley's Nature Groups (Please do not change settings)	15,200.00	15,200.00	No	\$		

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.

Main Menu

Customers

Invoices

Credit Control

Payments

Reporting

Setup

Logout

LIST OF A/R PAYMENTS RECEIVED

List of Payments

Payments

- List of Payments Received
- List of Cash on Account
- List of Payments by Currency
- List of Payments by Module
- List of Payments by Bank
- List of G/L Payments
- Custom List of Payments
- List of Imported Payments

Payment Selection

Selection Type

Financial Period

Entry Date Range

Deposit Date Range

Start Period

2022-04

End Period

2022-04

Get Payments

Generate PDF Report

Selected Payments

Page: 1 of 1GoPage size: 9Change

Item 1 to 9 of 9

Payment ID	Client	Period	Batch No.	Batch Type	Date Entered	Deposit Date	Bank	Card Type	C.O.A. Module	C.O.A. Product	Payment Type	Local Amount	Cash on Account	Payment Currency
> 2535.CC	SNOWYS DOG FOOD	2022-04	04/14/22CC		4/14/2022	4/14/2022	FIRST UNION--SpeedyTEST	Visa	Advertising	Demo Group	CC	3,770.00	3,770.00	
> 20224141	St. George Church	2022-04	1389	Cash	4/14/2022	4/14/2022	FIRST UNION--SpeedyTEST		Advertising	Shirley's Nature Groups (Please do not change settings)	CH	11,000.00	325.00	
> 2534.CC	Classified Self	2022-04	04/12/22CC		4/12/2022	4/12/2022	FIRST UNION--SpeedyTEST	Visa	Advertising	Demo Group	CC	365.00	0.00	

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

Credit Control Payments Reporting Setup 8 Logout

Record Type: **Check**

A/R PAYMENT DETAILS

Generate PDF Receipt Quick Look-up by ID

Header				Financial Summary			
Customer	St. George Church	Financial Period	2022-04	Amount	Local Currency	Foreign Currency	
Check/Payment ID	20224141	G/L Post Date		Allocated	11,000.00	0.00	
Date on Payment / Check	4/14/2022	Reconciled Date		Balance	10,675.00	0.00	
Payment from Bank	First Union	Batch No.	1389		325.00	0.00	
Payment Date	4/14/2022				0.00	0.00	
Entry Date	4/14/2022						
Entered By	Shirley High						
Deposit Bank	FIRST UNION--SpreedlyTEST						

GENERATE PDF RECEIPT

Select a Receipt Template

Cash Receipt

Generate PDF Receipt

Other Information	
Flagged for Refund	No
COA Reason	

Invoice Details - Local Currency Foreign Currency

Click the Generate PDF Receipt button.

PAYMENT RECEIPT

payer information		payment detail	
Account No.	255488	Payment/Receipt No.	20224141
Customer Name	St. George Church	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.

USER SETUP: A/R USER SETTINGS

User Setup

- General
 - User Settings
 - Rep/User Integration
 - History of Changes
- CRM
 - Access Control
 - Managers Home Page
 - Rep Home Page
 - Rep Summary Page
 - Calendar / Email Integration
 - Taskboard Settings
- Advertising
 - User Settings
- Accounts Receivable
 - User Settings**

Settings

User ID: SHIGH

User Name: Shirley High

User Security Group: Top of the Tree

Credit Control Settings

User Type: Credit Manager

My Team of Credit Controllers

Selected users must be setup as Credit Controllers or Managers to appear in the Credit Control system. Leaving this option blank (no selected Credit Controllers) will set all valid Controllers into this Manager's group.

AVAILABLE CREDIT CONTROLLERS	SELECTED CREDIT CONTROLLERS
Search Clear Joe Tester (~AAAM) Sherri ABC (ABC1TEST) Sherri ABC (ABCTEST1) ABC CLIO 2 (ABCTEST2) ABC CLIO 3 (ABCTEST3) ABC CLIO4 (ABCTEST4) ABC CLIO5 (ABCTEST5)	Wayne Burrows (WBURROWS) Shirley High (SHIGH)

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”.

CREDIT MANAGER: HOME

Report by: Due Date
Company Filter: Leave Blank for ALL
Aging Last Calculated: Friday, April 15, 2022 12:28 PM

RECENT PAYMENTS		OVERDUE INVOICE TOTALS						
Last 7 Days	Last 30 Days	Not Yet Due	0-30	31-60	61-90	91-120	121+	Cash on Account
11,000	24,475	530	156,517	19,055	6,240	68,753	4,711,664	-890,649

Credit Controllers
Filter by Status:

Controller	Balance	Not Yet Due	0-30	31-60	61-90	91-120	121+	COA	Payments Last 7 Days	Payments Last 30 Days
Wayne Burrows	4,025,150	0	76,240	18,056	0	48,430	3,948,442	-66,018	0	0
Shirley High	46,960	530	80,277	999	6,240	20,323	763,222	-824,631	11,000	24,475
	4,072,110	530	156,517	19,055	6,240	68,753	4,711,664	-890,649	11,000	24,475

Page: 1 of 1
Go
Page size: 2
Change
Item 1 to 2 of 2

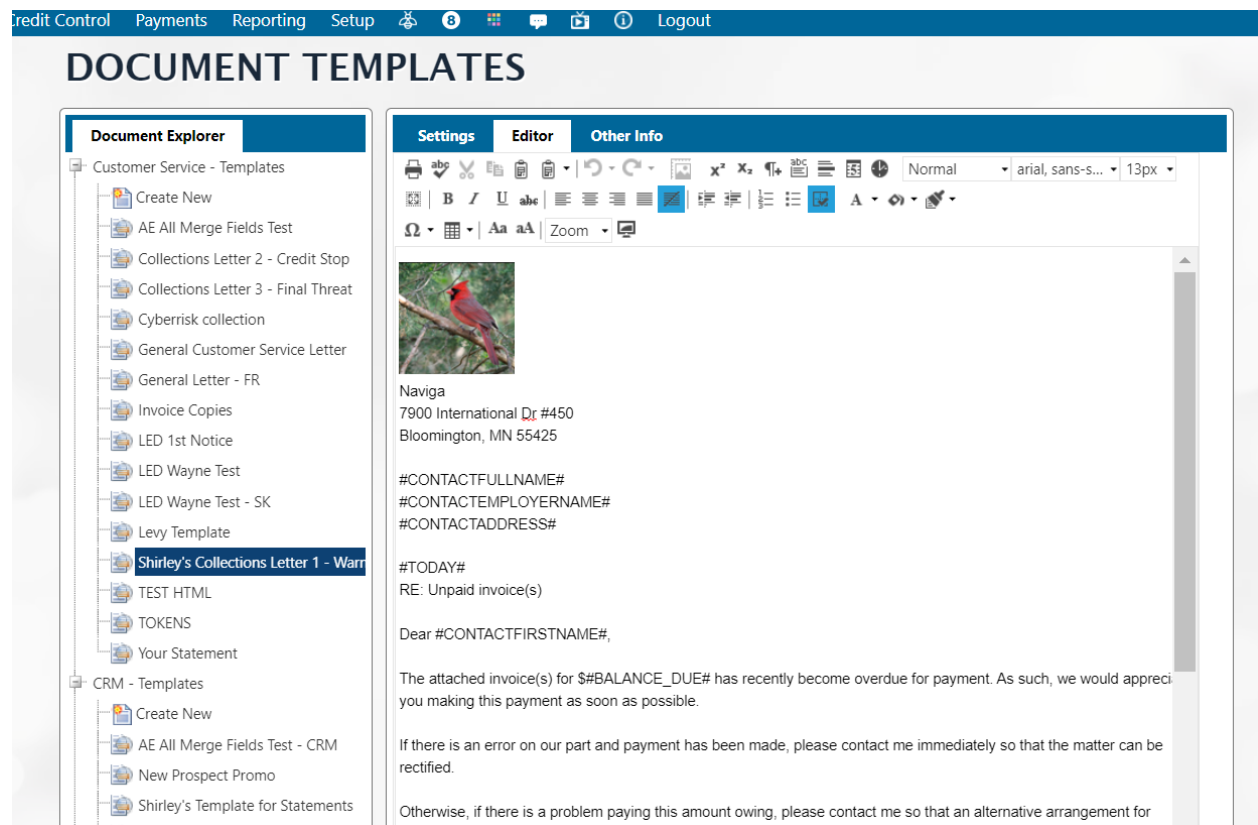
Controller Status Summary

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.



The screenshot shows a web application interface for managing document templates. At the top, a navigation bar includes links for Credit Control, Payments, Reporting, Setup, and a Logout button. Below the navigation bar, the main heading is "DOCUMENT TEMPLATES".

The interface is divided into two main sections:

- Document Explorer:** A sidebar on the left showing a tree structure of templates. Under "Customer Service - Templates", "Shirley's Collections Letter 1 - Warr" is selected. Other templates listed include "Create New", "AE All Merge Fields Test", "Collections Letter 2 - Credit Stop", "Collections Letter 3 - Final Threat", "Cyberrisk collection", "General Customer Service Letter", "General Letter - FR", "Invoice Copies", "LED 1st Notice", "LED Wayne Test", "LED Wayne Test - SK", "Levy Template", "TEST HTML", "TOKENS", and "Your Statement". Under "CRM - Templates", there are "Create New", "AE All Merge Fields Test - CRM", "New Prospect Promo", and "Shirley's Template for Statements".
- Editor:** The main workspace on the right. It has tabs for "Settings", "Editor", and "Other Info". The "Editor" tab is active, showing a rich text editor with a toolbar (bold, italic, underline, text color, background color, link, unlink, list, indent, outdent, etc.). The editor content includes:
 - A placeholder image of a cardinal perched on a branch.
 - Text: "Naviga", "7900 International Dr #450", "Bloomington, MN 55425".
 - Placeholder text: "#CONTACTFULLNAME#", "#CONTACTEMPLOYERNAME#", "#CONTACTADDRESS#".
 - Text: "#TODAY#", "RE: Unpaid invoice(s)".
 - Greeting: "Dear #CONTACTFIRSTNAME#,".
 - Paragraph: "The attached invoice(s) for \$#BALANCE_DUE# has recently become overdue for payment. As such, we would appreciate you making this payment as soon as possible."
 - Paragraph: "If there is an error on our part and payment has been made, please contact me immediately so that the matter can be rectified."
 - Paragraph: "Otherwise, if there is a problem paying this amount owing, please contact me so that an alternative arrangement for"

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

SEND EMAIL: ST. GEORGE CHURCH

First Call

From: shigh@msgl.com

To: Father Zaki, ASSOCIATE (frjacob@stgeorge123.net)

Other To:

CC: Shirley High (shigh@msgl.com) x

Template: Shirley's Collections Letter 1 - Warning

Subject: Please read. Important!

Attachments: statement_51494T.pdf

Statement Data:

Statement ID	Date	Run By
90638T	2/23/2022	RUSSELL BARR
62697T	10/12/2021	Ray Phelan
51495T	4/16/2021	Shirley High
51494T	4/16/2021	Shirley High
49125T	3/10/2021	Ray Phelan

Footer:

Naviga
7900 International Dr #450
Bloomington, MN 55425

Right Sidebar:

re-Payments Balance

-31,481.81	-18,443.08
------------	------------

Email Selected Documents

Total Due	View PDF
-7,753.08	☐
22,867.61	☐
13,357.61	☐
13,357.61	☒
2,675.00	☐

Buttons: Cancel Send Email

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.

CRM Manager	Home	Customers	Opportunities	Rep Summary	Advertising	Exhibitions	Setup	Logout
Activity	Marketing Analysis	Pipeline	Proposal Analysis	Group Sales	Digital Delivery	PinPoint	Advertiser Ranking	Bu

A/R Setup
Advertising Setup
Job Costing Setup
Newsstand Setup
Exhibition Setup
Subscription Setup
Channel Privacy Preferences
Attachments
Cards on File
Account Alerts
History of Changes

Minneapolis, MN 55442
Tel: (800) 987-6543

Account Status In Good Standing

Territory

Account Opened 4/25/2022

Last Updated

Transient Record ☐ No Set this flag to Yes if this is the generic, umbrella account you want to post all Classified Self Service orders to. Do NOT set this flag for regular private party advertisers.

Display Orders for this transient account record in production system ☐ No

Is this an Agency ☐ No

Use Multiple Brands ☒ Yes

Pay Sales Rep Commissions on Paid Invoices Only ☐ No

Client Type

Pre-Payment Required Prepayment NOT Required

Auto Apply Cash on Account when Campaign is Confirmed ☐ No

Default Invoice Form Detail Level Show Each Line - Including Costs

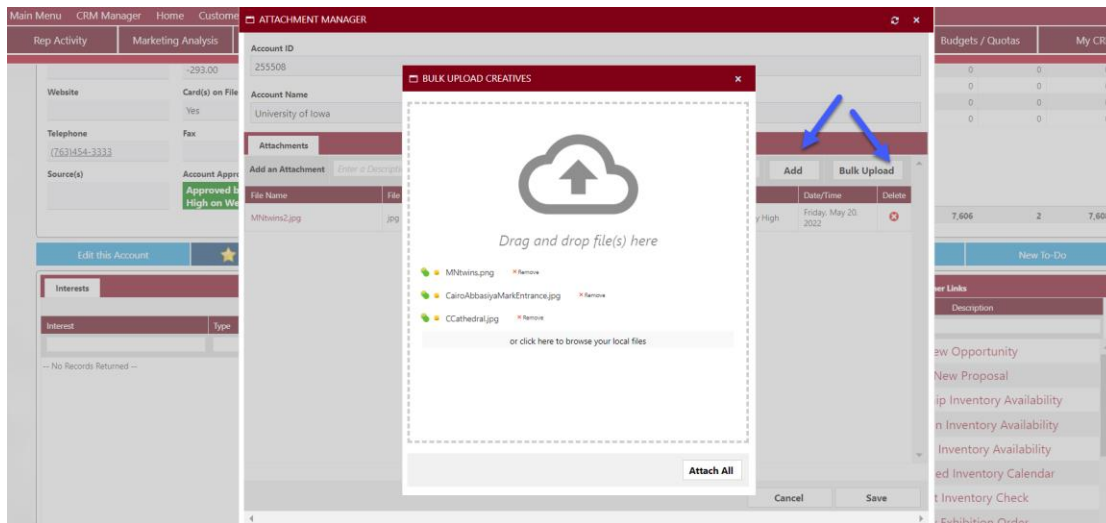
Note that the setting “Use Multiple Brands” is checked to “Yes”, which is identical to the Advertising header setup flag.

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”.

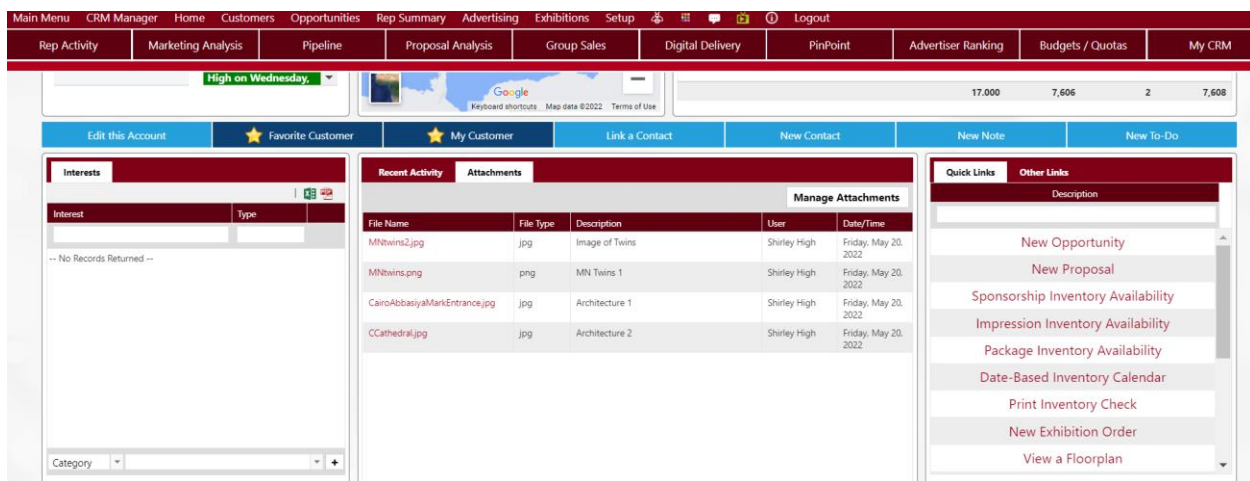
Attachments in Customer Overview Screen

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.

[Return to List of Opportunities](#)
Select an Edit Option

ENTER/UPDATE OPPORTUNITY

Opportunity Header

Opportunity Type	Ad Sales	Start Date	6/1/2022	Forecast Amount	0
Opportunity ID	1359	End Date	6/30/2022	Calculate Forecast Amount	
Advertiser ID	255342	Expected Close Date	6/1/2022	Currency	Use System Default
Advertiser Name	Adelson Painting	Created Date	6/1/2022	Owned By	Shirley High
Brand	BLUE	Age	0	Stage	New Lead
Agency ID				Probability	5 %
Agency Name				Tags	Paint
Call List					
Marketing Campaign	Start Typing to Search				

Description of Opportunity

Short Description
test tags
Long Description

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".

[Return to List of Opportunities](#)

OPPORTUNITIES TASKBOARD

Opportunity Type: Ad Sales
Sales Rep(s): All items checked
Group / Product: Group
Marketing Campaign: Astror
Client Type:
Expected Close Date: Start
Last Updated on or After: End
Tags: art paint
Sort By: Advertiser - Ascending
Refresh

Search

New Lead
Items Count: 1

Qualified Prospect
Items Count: 0

Internal Review
Items Count: 0

Verbal Commit
Items Count: 0

Finalizing Paperwork
Items Count: 0

Adelson Painting
Projected Value: 0
test tags
Marketing Campaign:
Closing: Wednesday, June 1, 2022
Days to Close: 0
Full Value: 0
Probability: 5%
Paint art Astronomy Magazine
Shirley's Nature Groups

SH

Click the opportunity.

OPPORTUNITY DETAIL

OPPORTUNITY ID: 1359
[Click here to View/Edit this Opportunity Record](#)

ACCOUNT: Adelson Painting

OWNED BY: Shirley High

SHORT DESCRIPTION: test tags

EXPECTED CLOSE DATE: Wednesday, June 1, 2022

MARKETING CAMPAIGN: [Dropdown]

STAGE: New Lead PROBABILITY: 5.00 %

FORECAST AMOUNT: 0

TAGS: Paint * art *

Buttons: Cancel, Save

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.

OPPORTUNITY QUICK UPDATE

Search filters: Opportunity Type (Ad Sales), Sales Rep(s) (High, Shirley), Group / Product (126 items checked), Marketing Campaign, Client Type, Expected Close Date, Last Updated on or After, Tags. Refresh button.

ID	Description	Advertiser	Brand	Agency / Bio-to	Start Date	Close Date	Owner	Marketing Campaign	Client Type	Currency	Age	Stage	Tags	Last Updated	Last Updated by	Prob. %	Full Opportunity Value	Weight Opportunity
1045	test 2015	Montana Tours	Brochures		12/1/2019	3/1/2020	Shirley High	20223			946	Finalizing Paperwork	Mountains	6/1/2022 8:10 AM	Shirley High	90	700.00	630
1198	test	Minnesota Trains	Cards		4/1/2022	6/30/2022	Shirley High	SH1	ART		30	Internal Review 30%		6/1/2022 8:10 AM	Shirley High	30	1,111.00	330
1188	testing s	Sam Damold Training	Coaching	2022 Agency	12/9/2021	12/9/2021	Shirley High	20223	ART		175	Internal Review 30%		6/1/2022 8:10 AM	Shirley High	30	0.00	0
1175	Date Off	Sam Damold Training	Sam Damold Training		10/25/2021	10/30/2021	Shirley High	SH1	ART		219	Internal Review 30%		6/1/2022 8:10 AM	Shirley High	30	0.00	0
8452022	Copt 2 2	Coptic Church	Liturg Announcements		8/5/2021	8/15/2021	Shirley High		AUC		302	Internal Review 30%				30	333.00	90

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.

The screenshot shows the 'Configure Output' interface for the 'Opportunities' module. It is divided into two main sections: 'ON SCREEN COLUMNS' and 'Excel Export Columns'. Each section contains a 'Reset Configuration' and a 'Save Configuration' button. Below these buttons are two lists: 'Available' and 'Selected'. In the 'ON SCREEN COLUMNS' section, 'Prob. %' is highlighted in the 'Available Grid Columns' list, and a right-pointing arrow is shown between the 'Available' and 'Selected' lists. The 'Excel Export Columns' section also has similar lists and arrows.

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.

The screenshot displays the 'Opportunity Quick Update' interface. At the top, there is a search bar with various filters: Opportunity Type (Ad Sales), Sales Rep(s) (High, Shirley), Group / Product (Groups, 2 items checked), Marketing Campaign, Client Type, Expected Close Date (Start/End), Last Updated on or After, and Tags. A 'Refresh' button is located to the right of the search bar. Below the search bar is a table with the following columns: ID, Description, Advertiser, Brand, Start Date, Close Date, Owner, Marketing Campaign, Age, Stage, and Tags. The table contains 10 rows of data, including opportunities like 'test 2019.4', 'test', 'testing sections', 'Date Offset', 'Copt 2 255472', 'Dio 2 255472', 'Test Import Legacy 2', and 'Legacy ID test for import future'.

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.

The screenshot displays the CRM Setup interface. At the top, a navigation bar includes links for Home, Customers, Opportunities, Rep Summary, Advertising, Exhibitions, Setup, and Logout. Below this is a menu bar with icons and labels for Marketing Analysis, Pipeline, Proposal Analysis, Group Sales, Digital Delivery, PinPoint, Advertiser Ranking, and Budget. The main content area is titled "REVENUE TIERS". On the left, a "Ticket Setup Tables" sidebar lists various settings, with "Revenue Tiers" highlighted by a red box and a blue arrow. The main panel shows a table of Revenue Tiers with columns for ID, Description, Lowest Value, and Highest Value. Three tiers are listed: 1 (10K - 50K), 2 (51K - 250K), and 3 (251k - 300k). A fourth tier is being added with a description "Enter a Description", a lowest value of 251,000.0, and a highest value of 300,000.0. A red 'X' icon is visible in the rightmost column of each tier row.

ID	Description	Lowest Value	Highest Value	
1	10K - 50K	10,000.0	50,000.0	X
2	51K - 250K	51,000.0	250,000.0	X
3	251k - 300k	251,000.0	300,000.0	X
ID	Enter a Description	251,000.0	300,000.0	+

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.

ADD A NEW ACCOUNT

[Go to Full Name Maintenance](#)

New Account

Account Name Minnesota Landscape				Source Call in	
Account Type Advertiser / Exhibitor				Phone No. 7635454444 Fax	
Employees 50	Tier 26 - 100	Annual Revenue 50,000.0	Tier 10K - 50K	Website 	
Client Type National Account		Industry Category/PIB Art - Galleries/Sales		Country UNITED STATES	
Primary Industry Landscape		Secondary Industry Art		Address 55 Garden Road	
Parent Account 				Search Remove	
Multiple Brands/Divisions Yes, This Advertiser Uses Multiple Brands				Zip Code 55442	
Brand/Division ID A1				City MINNEAPOLIS	

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”.

MINNESOTA LANDSCAPE

Sales CRM | Ad Production | Accounting | Exhibition Sales | Newsstand Sales | [Account Quick Search](#)

Overview | MediaRadar | Other | Rep Access

Primary Industry: Landscape
Secondary Industry: Art
Annual Revenue / Tier: 50,000.0 / 10K - 50K
Employees / Tier: 50 / 26 - 100

Aliases: tier

Map | Addresses | My Contacts

Sales by Year | Sales by Product | Sales by Format | Sales by Division / Brand | Insights

NOTE: Numbers shown are for Confirmed orders only, except for the current year which includes future non-confirmed orders.

Year
2023
2022
2021
2020
2019
2018
2017

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

EDIT COMPANY

Account Name: Minnesota Landscape

Parent Account: [Account Quick Search](#)

Account Type: Advertiser / Exhibitor

Website:

International Tax ID:

Primary Industry: Landscape
Annual Revenue: 50,000.0
Tier: 10K - 50K

Secondary Industry: Art
Employees: 50
Tier: 26 - 100

Aliases

Aliases are other names this Account may also be known by (e.g. International Business Machines is also referred to as IBM). These aliases are included in account searches.

tier 2 × tier 3 ×

+

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.