User Guide 2022.4

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Purpose

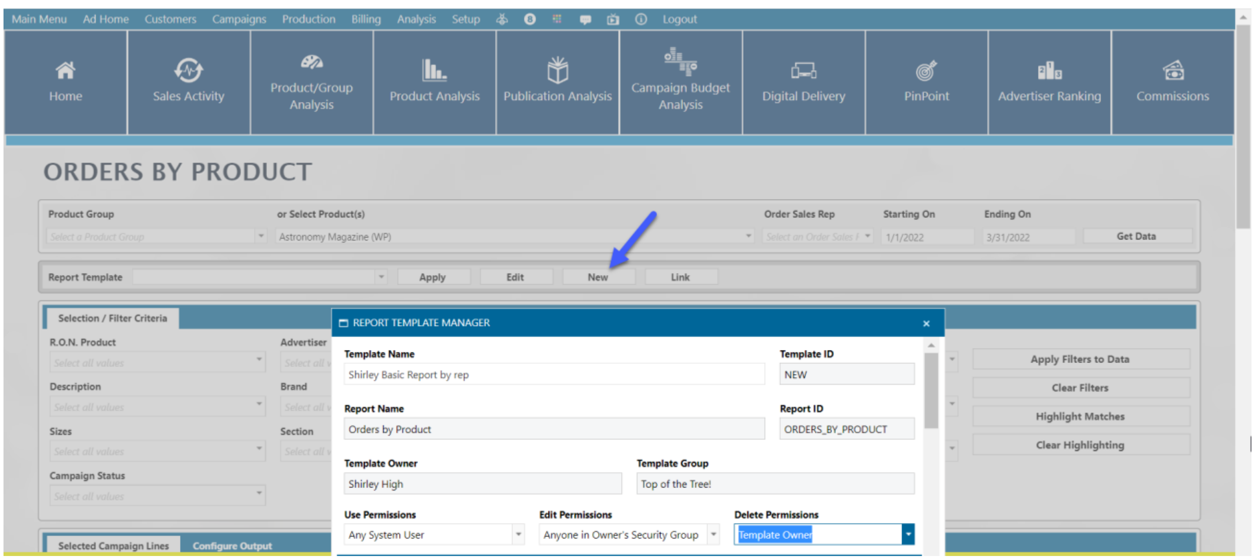
This document provides a step by step guide to 2022.4 features and how to apply them in Naviga.

Advertising Module

Report Template

Production by Group and Orders by Product reports now allow user to save report template so that user can run the template report without having to re-enter report criteria every time. It allows for multiple templates.

Navigate to the menu Campaign -> Orders by Product and scroll to the section “Report Template.”

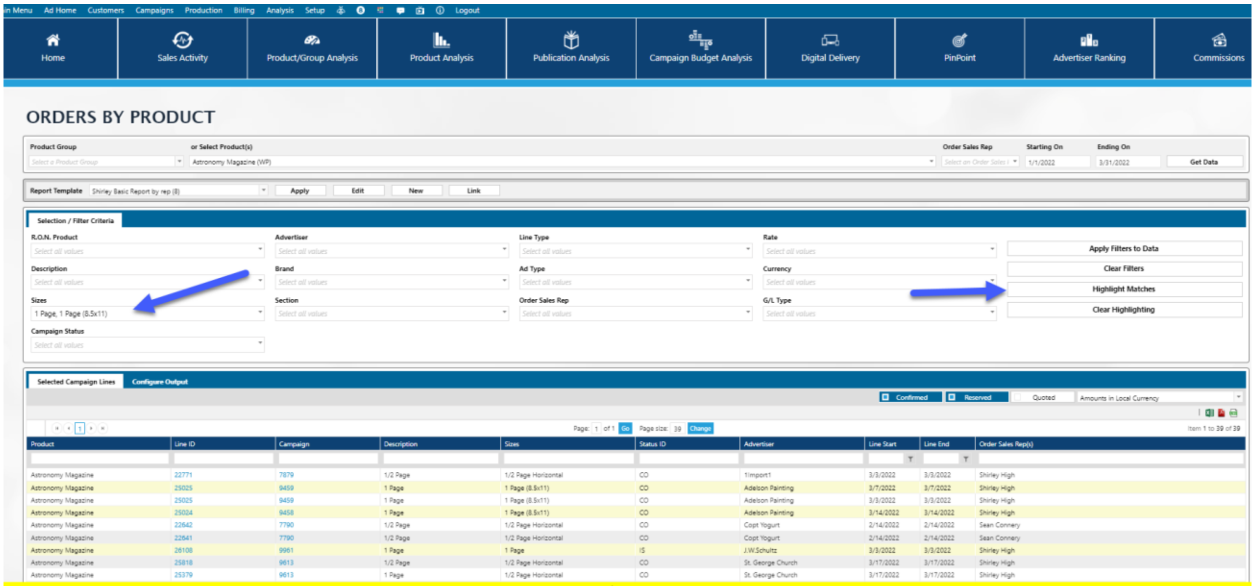


Click “New” and in the pop-up screen, enter the template name, and then choose the level of access to the report you’d like to have. For example, Use Permission to allow someone to run the report, Edit Permission to allow changing parameters and Delete permission. Each can be assigned either to all system users, template creator only or everyone in your security group. Save the report.

Then you can run the report to see the data.

You can create multiple reports in this manner and save them.

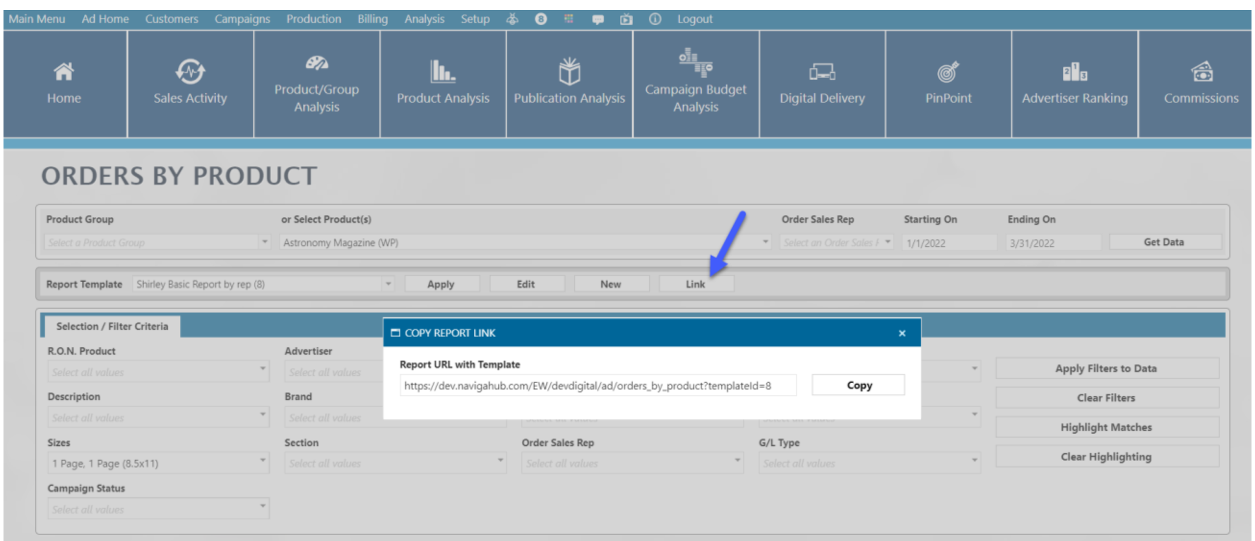
Also, once you run the report, you can choose more filter criteria from the screen. For example, the size and then click highlight matches.



Once the data is highlighted on the screen, you can then click Edit in the Report Template section. The system prompts you if you'd like to save these changes to the report.

If you exist the screen and return and run the report again, you'll only see the highlighted values from the report.

Click the tab "Link".



This provides you with a URL to this report which you can send or embed elsewhere. Click Copy and this copies the link to the clipboard.

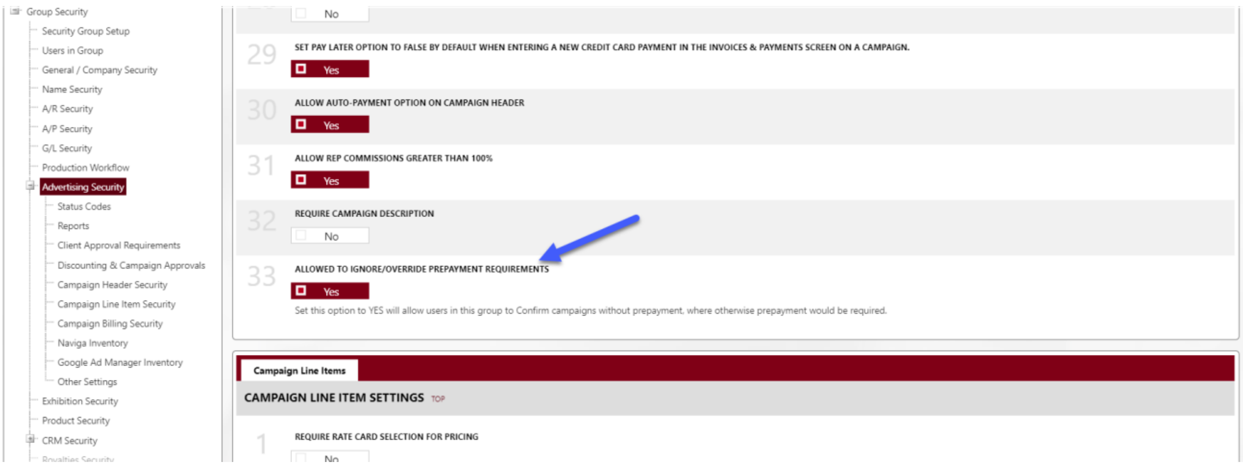
You can change the screen configuration fields and create as many reports as you need in the same way.

Repeat for the menu Production -> Production by Product Group.

Override Prepayment Requirement to Confirm Campaign

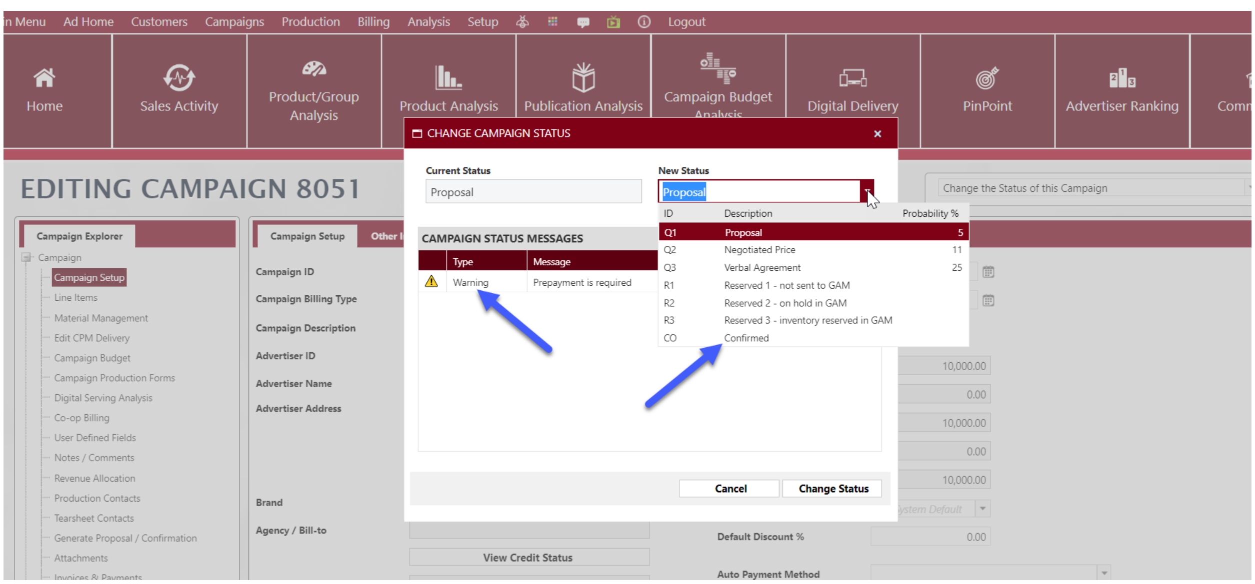
Group Security option “Allowed to Ignore/ Override Prepayment Requirements”. When this is checked to Yes, the system allows user to confirm a campaign even if prepayment is mandatory and no confirmation is allowed unless campaign is prepaid.

Navigate to the menu Setup -> Admin -> Group Security -> Advertising Security. Scroll to the option “Allowed to Ignore/ Override Prepayment Requirements”. Set the flag to “Yes”. Save the settings.



Navigate to the menu Customers -> Advertiser/ Agency Maintenance and choose an advertiser. In the Advertising Security node, choose the option to make this advertiser require prepayment. Save the settings.

Create a campaign for the advertiser in the Quote or Reserved status. Click the edit drop-down to change the status of the campaign to Confirmed. Normally this option wouldn’t be available, and a message explains the prepayment requirement.



In this case, the Confirmed option is available, and a warning message is displayed to explain that this is a prepayment required customer. Choose the confirmed status and system will allow you to confirm the campaign.

Navigate to the menu Campaigns -> Bulk Update Change Status and query on the advertiser.

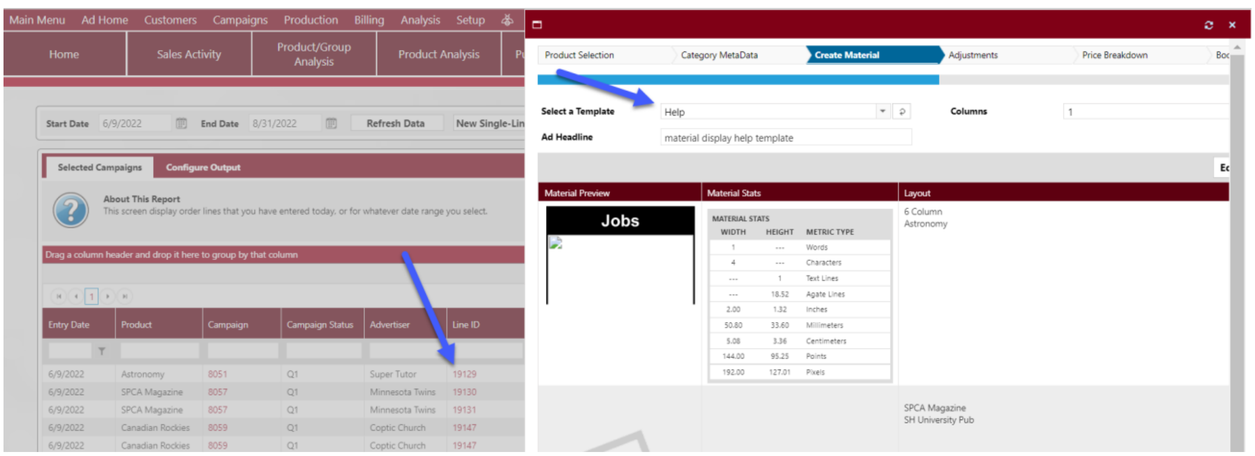
The option for Confirmed is available for the advertiser with partial prepayment.

My Orders Quick Entry

My Orders – Quick Entry now displays template based classified orders created through the Booking Wizard in full.

Navigate to the menu Campaigns -> Enter New Campaign and use the full entry method. Choose the "Booking wizard" button to create a template based classified ad.

Navigate to the menu Campaigns -> My Orders Quick Entry and search on the dates to include the campaign you just created.



Click the hyperlink to the Line ID and the template details are displayed for this campaign.

Partial Prepayment

New flag allows for partial prepayment to be applied to a campaign if prepayment is required on an advertiser.

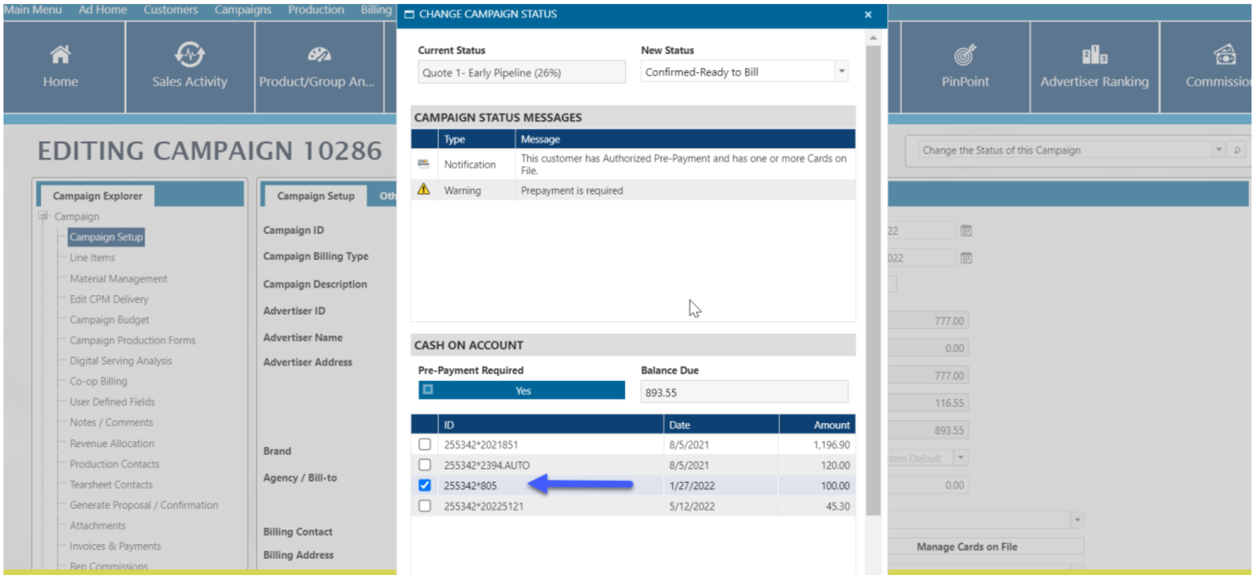
Navigate to the menu Setup -> Advertising Setup -> System Parameters. Check the flag "Allow Partial Pre-Payments When Pre-payment is Required". Set the flag to "Yes" and save the settings.

Setting this option to NO will require that orders requiring pre-payment, receive pre-payment in full.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance. Choose an advertiser from the drop-down menu and click the node "Advertising Setup".

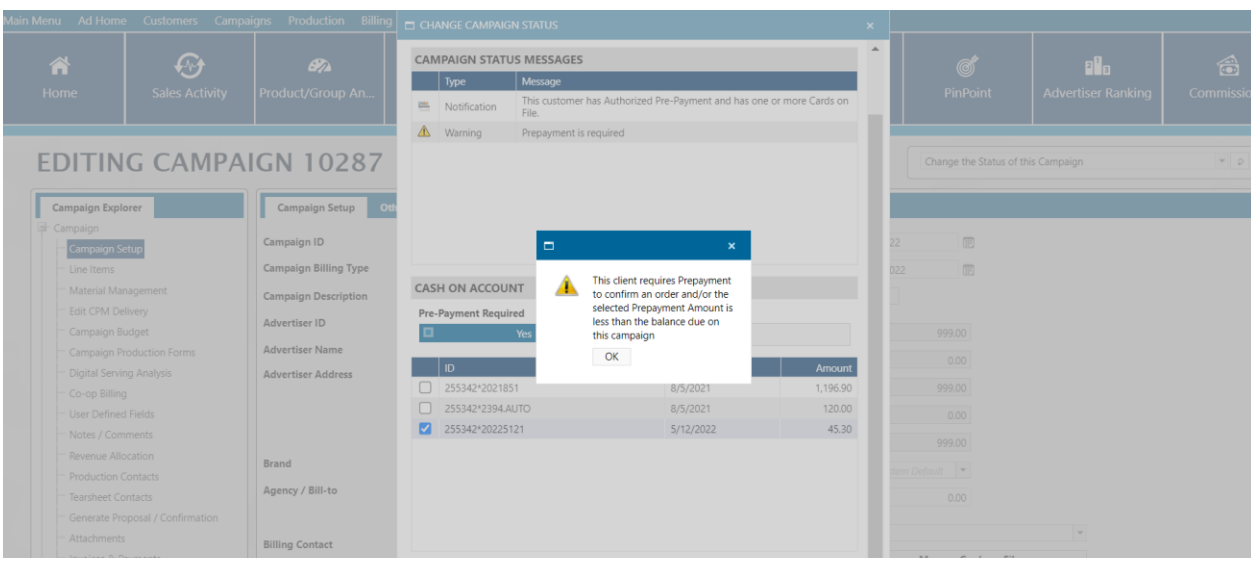
In the field "Pre-Payment Required" select the option "Pre-Payment Required" and save the settings.

Create a campaign in Quote or Reserved status. Edit the status to change it to Confirmed.



Choose the amount, which is less than the campaign's amount, choose Confirmed status and apply the partial payment. The campaign is confirmed successfully.

Navigate back to the System Parameters screen and set that flag to "No" and save the settings. Repeat the campaign creation and status change.

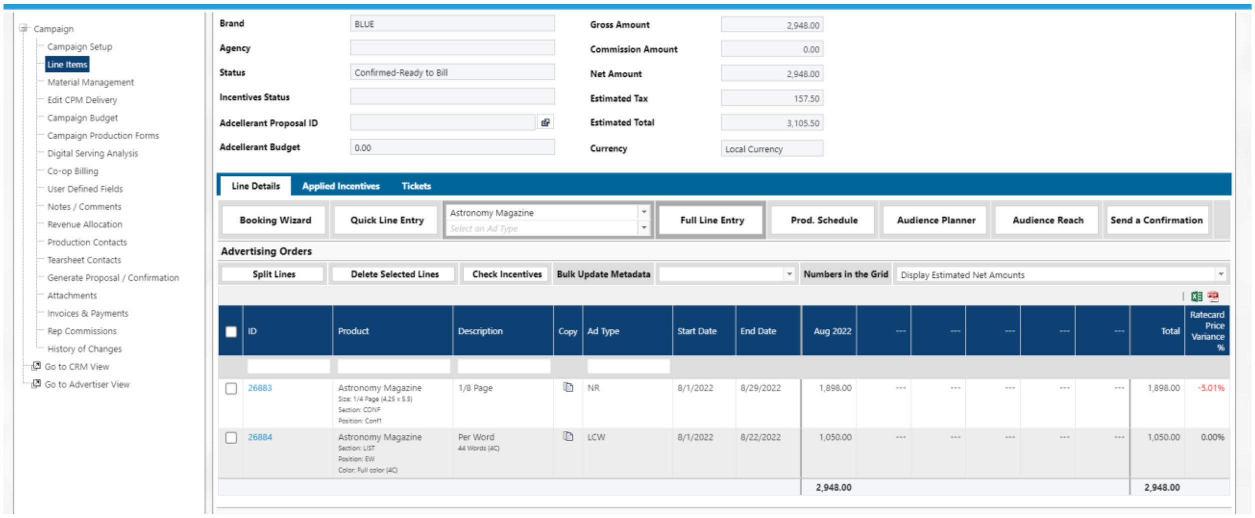


This time the system will not allow confirmation and a message indicating that this amount for prepayment is less than the balance due on the campaign.

Affidavit Consolidation

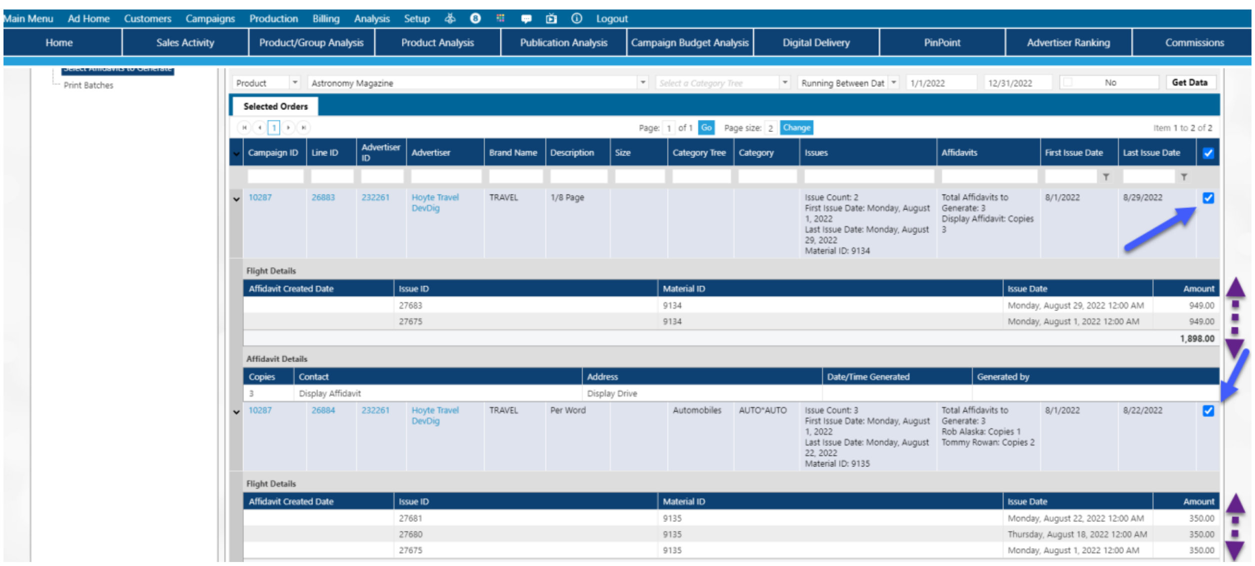
Affidavits generated will consolidate matching orders; to match if the same Campaign, product, order group, category tree, description and dimensions.

Navigate to the menu Campaigns -> Enter a New Campaign using a product which allows for Affidavits. Create a display line with 2 issues and mark the Affidavit copies and addresses. Create a classified line with 3 issues and mark the Affidavit copies and addresses.



Confirm the campaign.

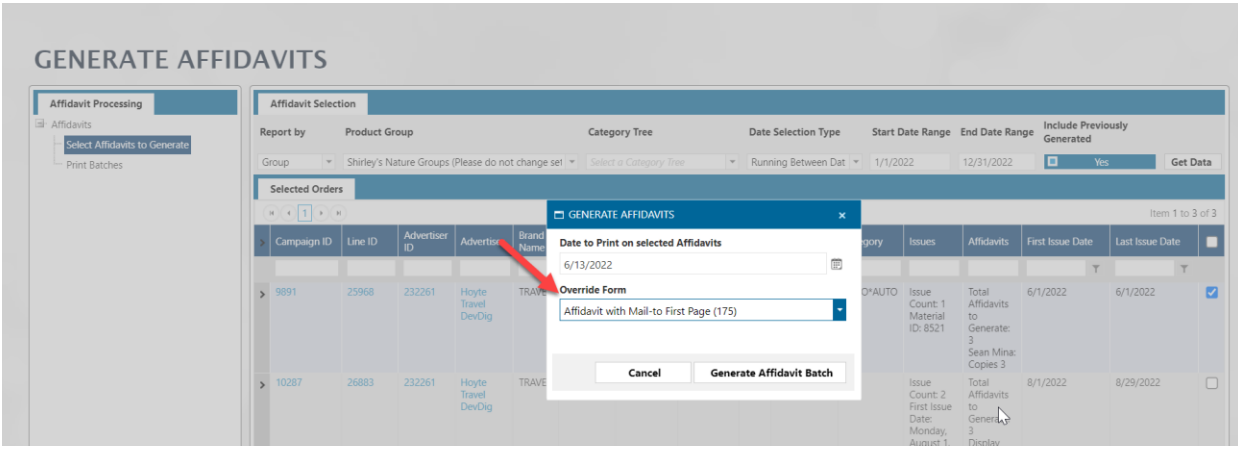
Navigate to the menu Billing -> Affidavits -> Affidavit Processing. Query on the product used in the campaign above using the running dates of the campaign.



Note that the campaign is grouped by each line where each has multiple issues, but same category tree if applicable, and dimensions.

Check the box to generate one affidavit for each line issues. This way you don't have to generate affidavits for all insertions if not needed.

Note that on generating the Affidavit, the system prompts you if you'd like to choose an override Affidavit form.



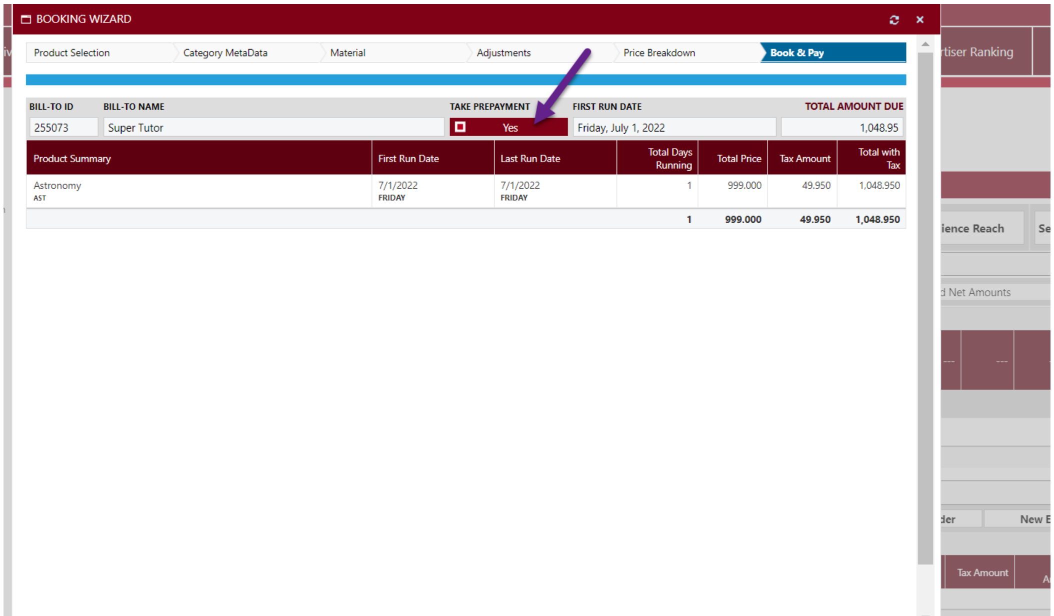
You can leave the option blank to default to the system setup form for this product or choose a new value in the drop-down.

Edit Booking Wizard for Prepayment Required Client

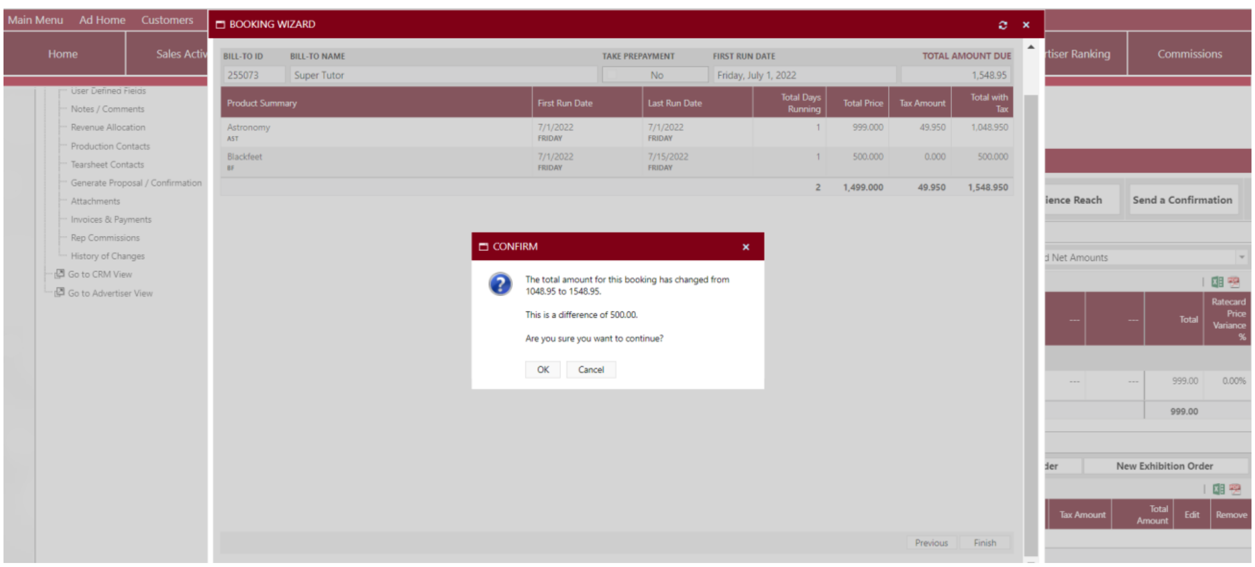
Booking Wizard line item when edited for a prepayment required advertiser and the "Take Prepayment" flag is checked in line entry "Book & Pay" tab, the system will warn user if there's any change in payment amounts but will not enforce new prepayment of remaining amount.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance. Choose an advertiser and click the "Advertising Setup" node. Mark the advertiser as "Prepayment Required" option. Save the client settings.

Navigate to the menu Campaigns -> Create a New Campaign for an advertiser who is marked to take payment on placing the order.



Save the order. Then edit the group line item to add more lines. On saving the system alerts you to the change in amount.



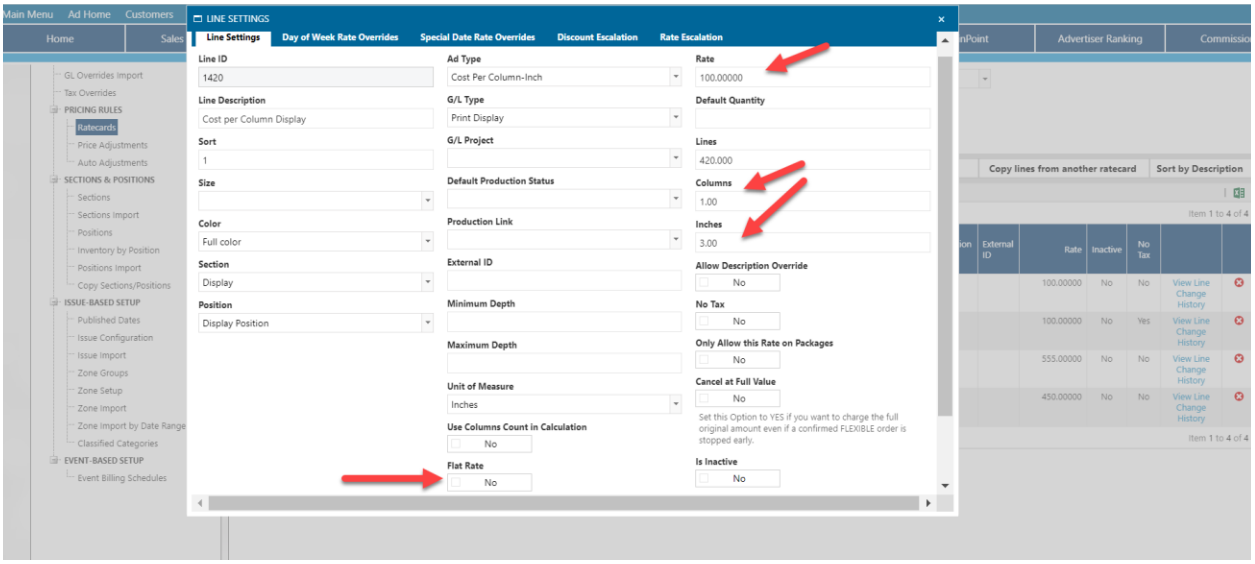
The system isn't marked to "Take Prepayment" as it was when entering the group initially.

Click OK. The campaign is saved with the new amount.

Flat Rate on Ratecard Line Overrides Rate X Quantity Calculation

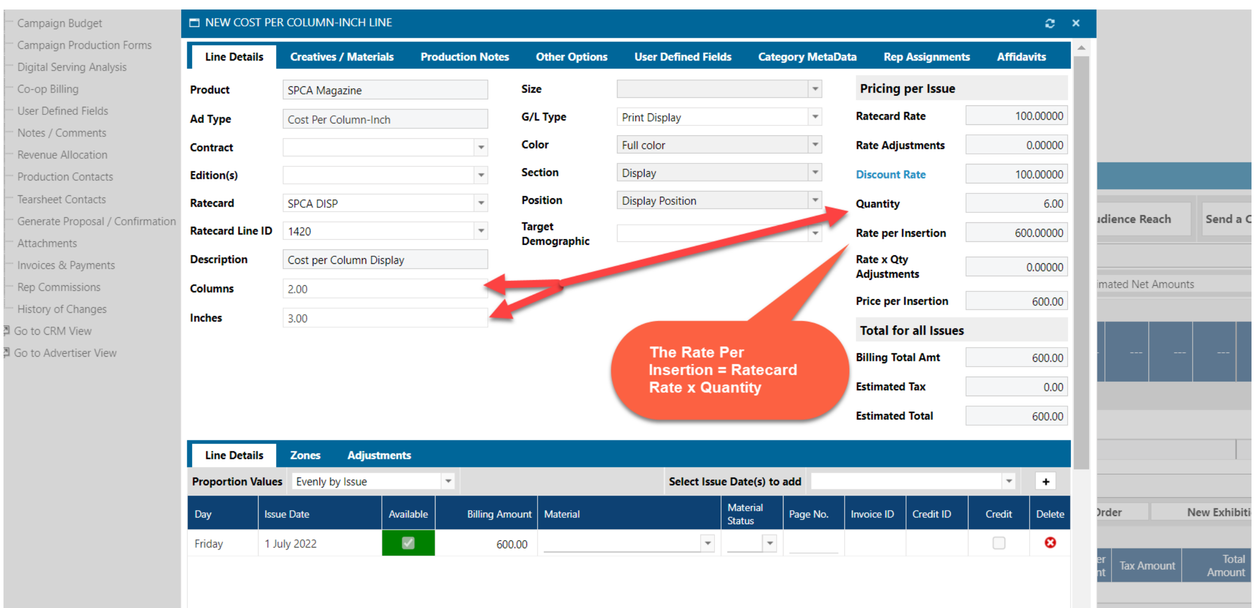
Flat Rate flag is available on Ratecard lines so that when it's checked, the system will not consider a calculation of Rate x Quantity, but instead will apply the Ratecard fee to the line.

Navigate to the menu Product -> Product Setup -> Ratecards. Edit an existing or create a new Ratecard line which is for Cost Per Column Inch for a display Ratecard.

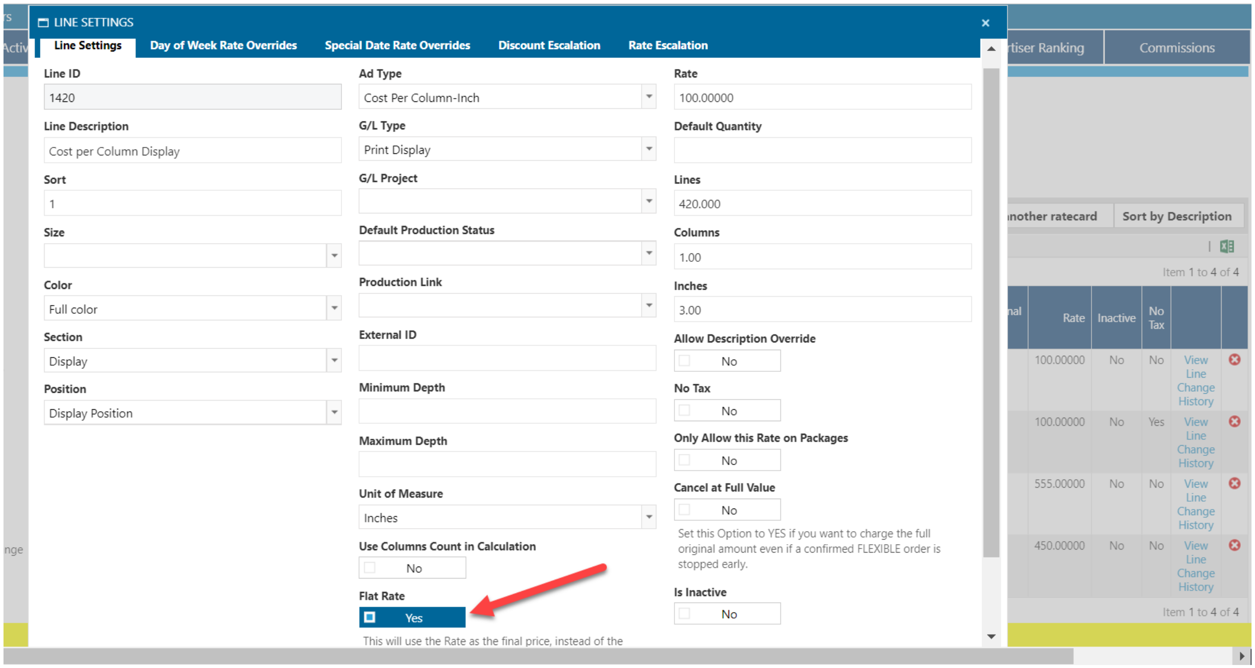


Save the line with the “Flat Rate” flag unchecked and save the Ratecard.

Navigate to create a campaign line for this product, Ad type and Ratecard line. Increase the Column count in the line.

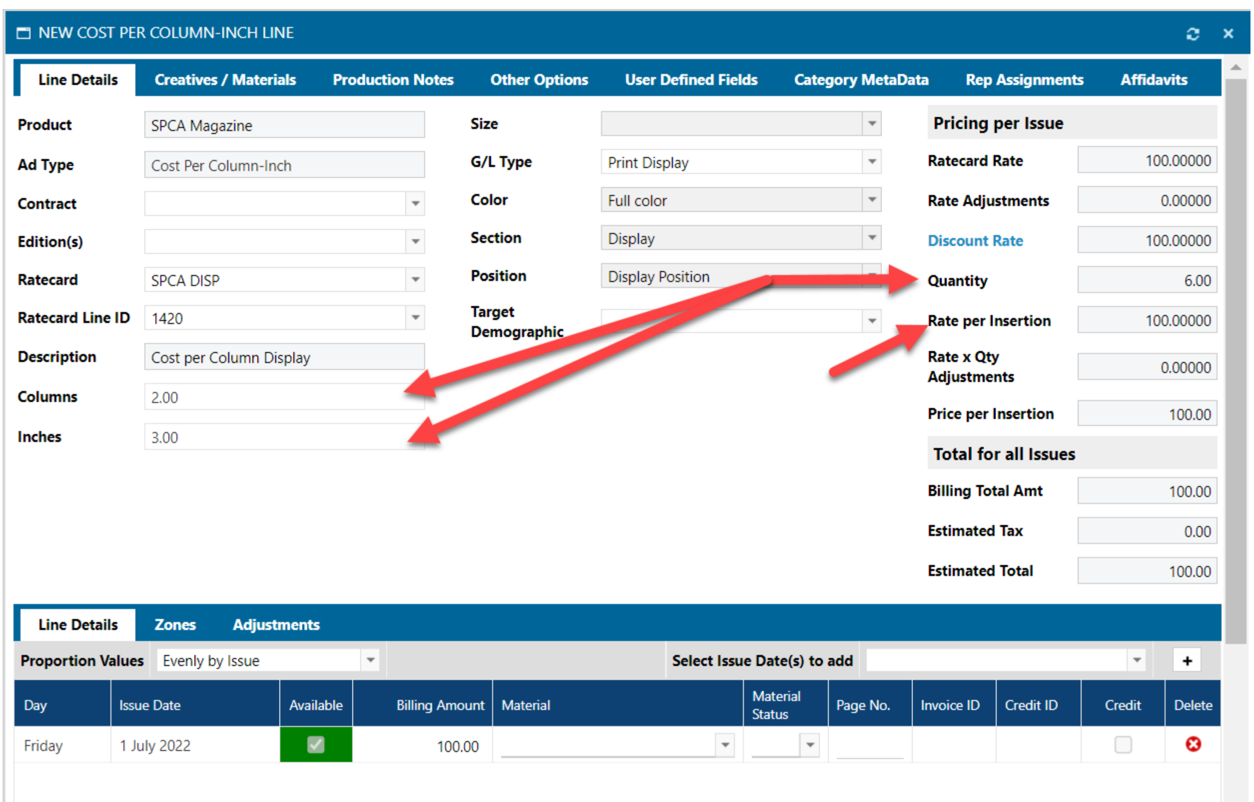


Navigate back to the Ratecard line and check the flag “Flat Rate”.



Save the line and the Ratecard settings.

Navigate back to the campaign and create a new line using this Ratecard line.

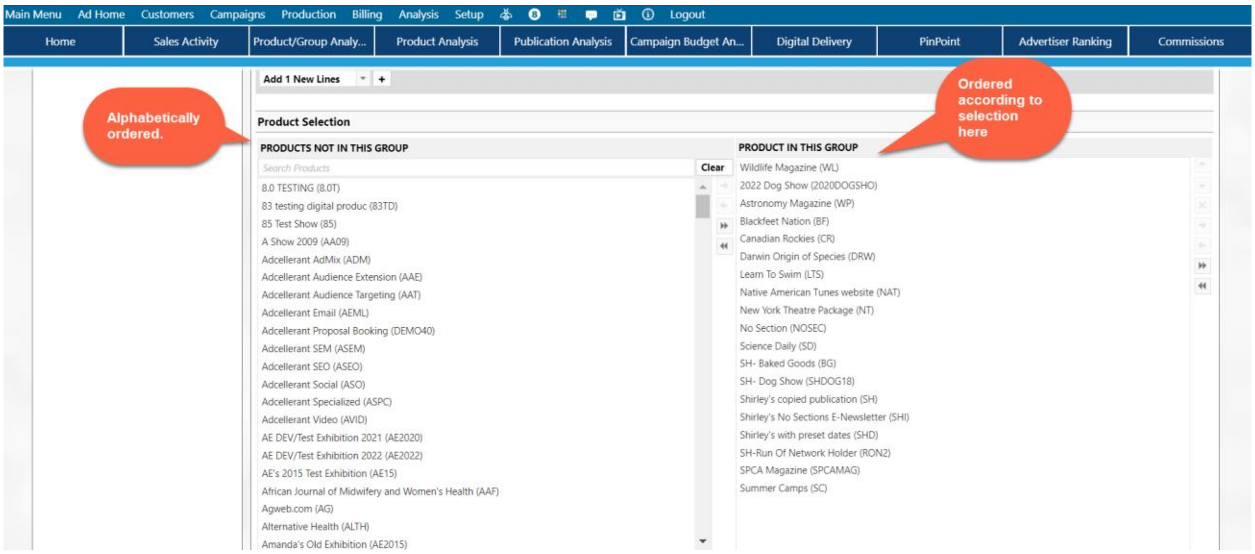


The Rate Per Insertion now ignores the Quantity x Rate formula and uses the flat rate from the Ratecard Line as the fee.

Products Sorted in Product Group

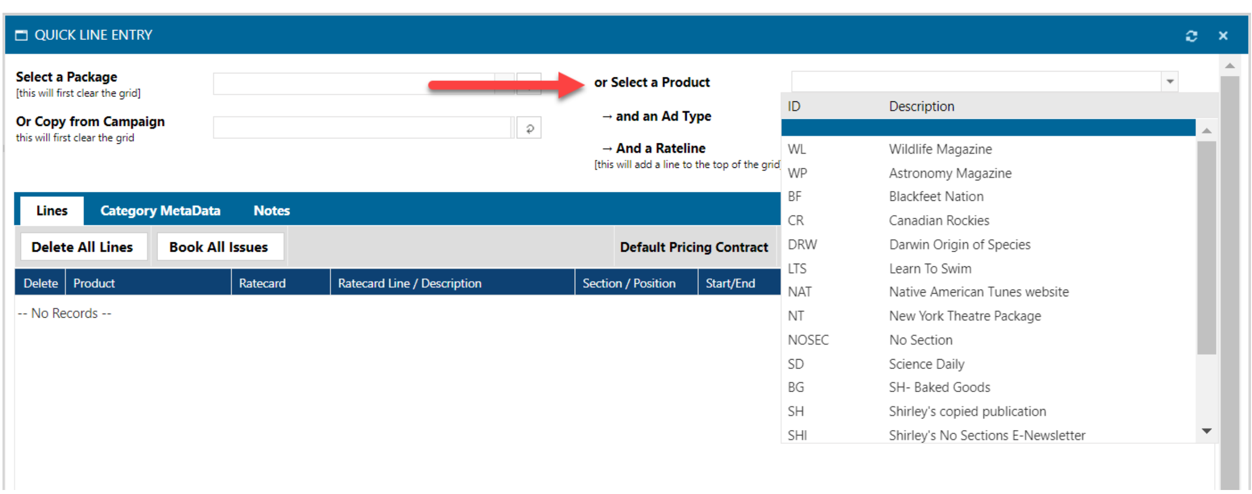
Product Group sorting of products included in the group is maintained in order entry.

Navigate to the menu Setup -> Product Group setup -> Product Group Settings. Scroll to the section to choose the products to be included in the group.



Highlight any product from the left side and click the right facing arrow to include the product in this group. Note that in the left side, the products are ordered alphabetically, while on the right hand side, you can move the products up and down by highlighting the product and clicking the up or down arrow. Save the settings.

Navigate to the menu Campaigns and create a new campaign using this product group. Note that in Full line entry, quick line entry and Booking wizard the order of the products from this list is maintained.



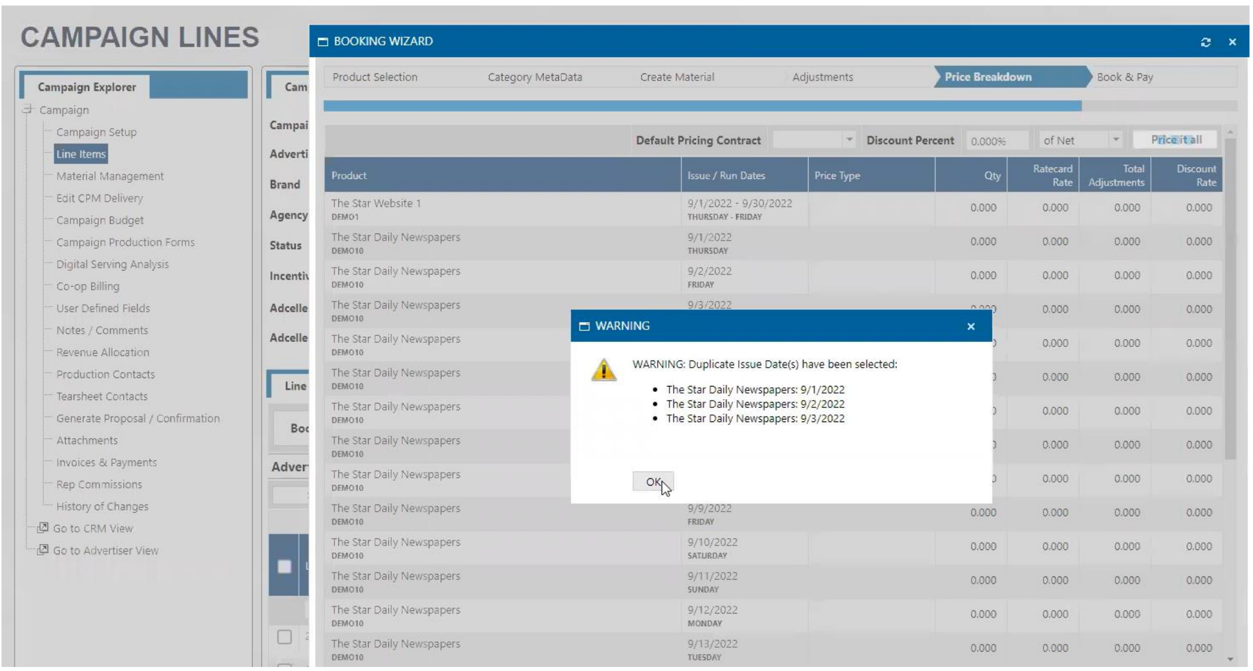
This is to facilitate searching for the product in the list according to the user's preference.

Booking Wizard Warning of Duplicate Issues on a Line

Booking Wizard now provides user with a warning if duplicate issues are booked on the same line same as it does for full line entry.

Navigate to the menu Campaigns -> Create a New Campaign and use the Booking Wizard button to create the line.

Choose any of the three options to enter line item with multiple issues all with the same date.



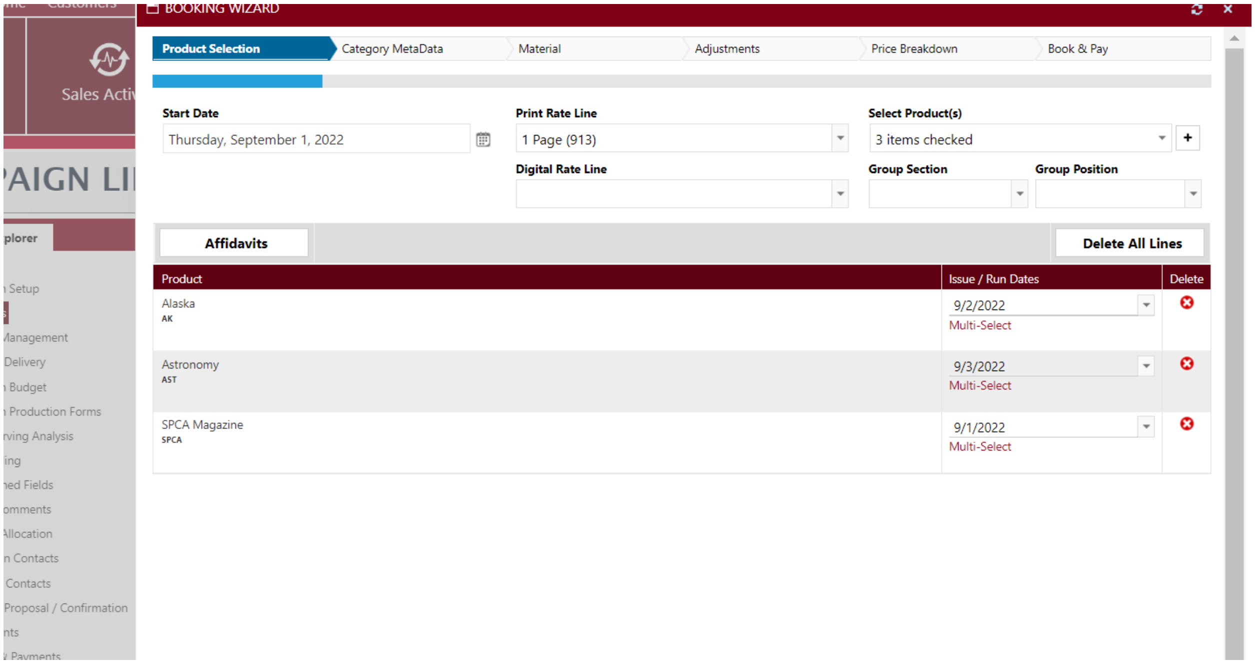
The system alerts you to the duplicate issue dates.

Booking Wizard Material on Each Line

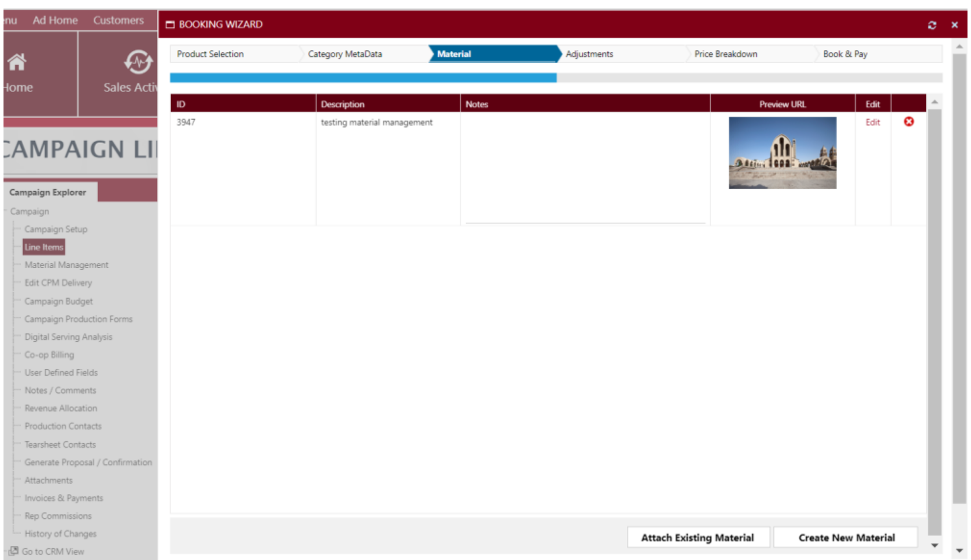
Booking Wizard Display option lists the material associated with all the line items by default on the Price Breakdown tab if material is created in the Materials tab in the entry screen. The material linked to each item can still be edited in the Price Breakdown tab.

Navigate to the menu Campaigns -> Create New Campaign.

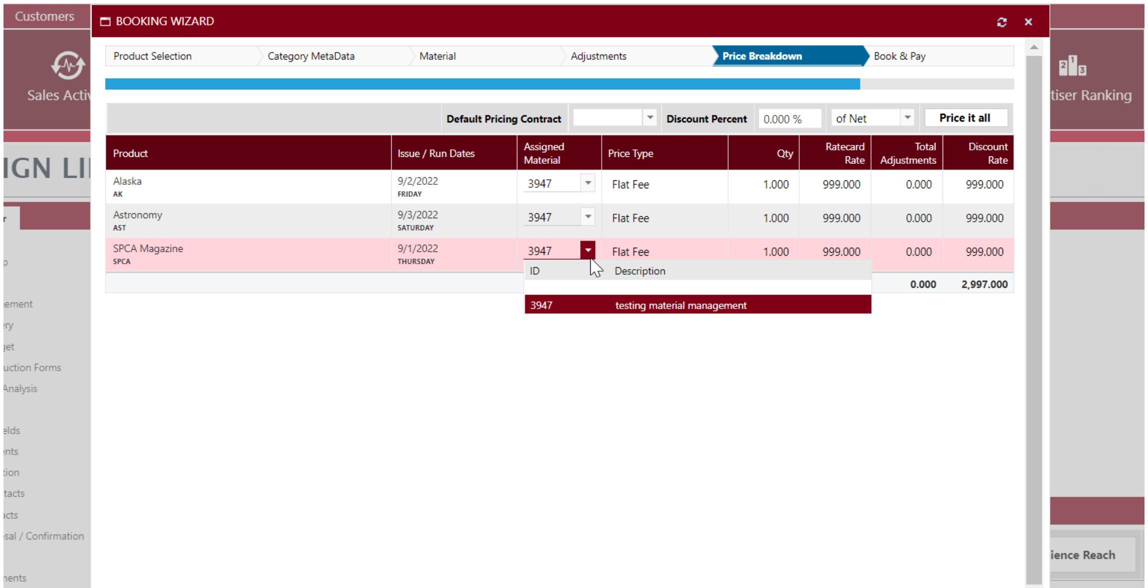
Use the Booking Wizard option and choose the third tab "Display AD" option to enter the lines. Choose a Print Rate Line from the Group Ratecard options. Then choose the products and issue options.



Click Next to the Material tab and attach or create a new piece of material.



Click the Next to the Price Breakdown tab.

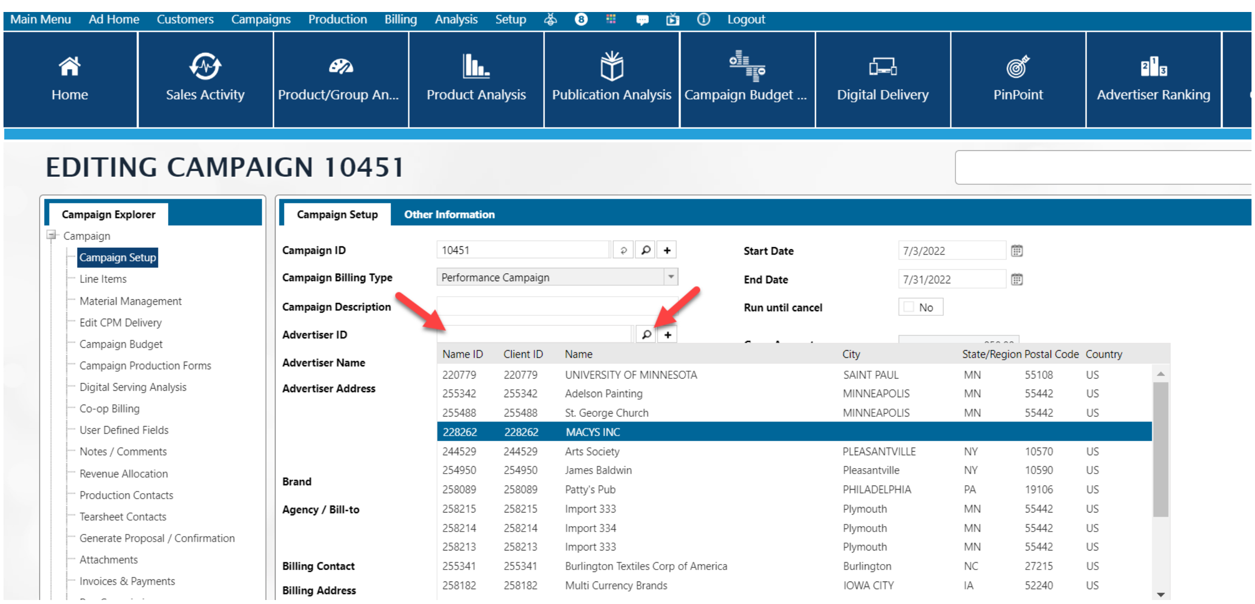


Note the column "Assigned Material" on each line contains that one piece of material you created. You can have more than one material record and choose to associate with one or none of the materials on each line.

Cannot Change Advertiser on Campaigns with Status Confirmed, Reserved and Billed by Direct Overwriting

Campaigns with statuses Reserved, Confirmed and Billed will no longer allow change of advertiser by searching and overwriting directly on the campaign setup screen.

Navigate to create a new campaign in the Quote Status.



Note that you can click the Advertiser ID field and choose a new record or use the magnifying glass to search for an advertiser.

Save with the new advertiser and the system allows for the change.

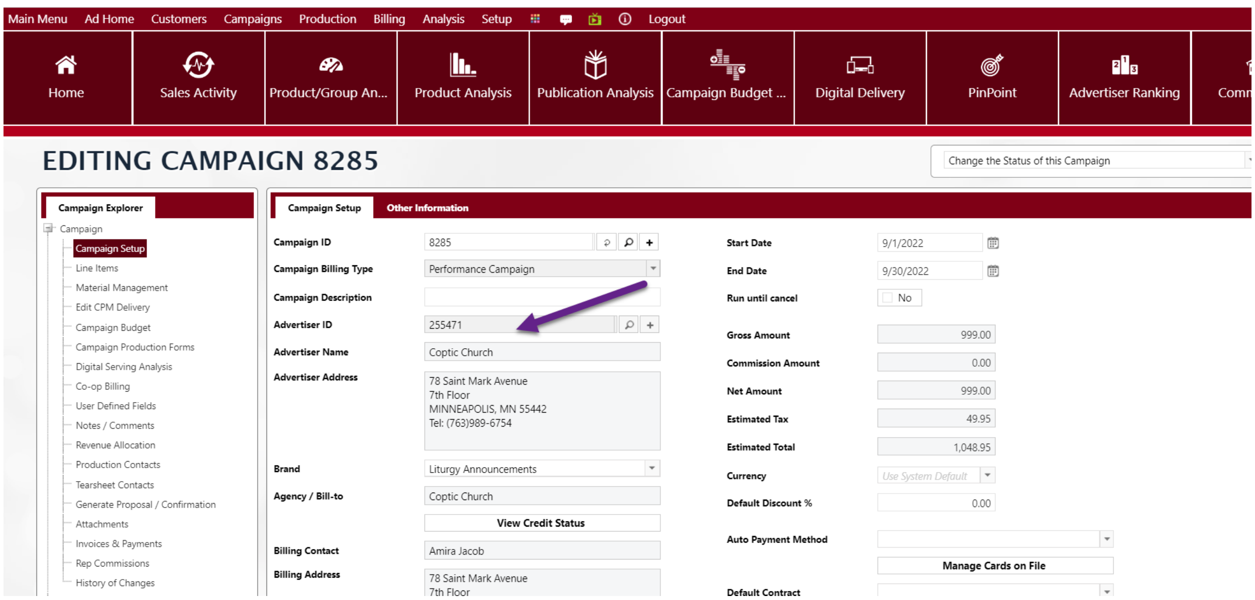
Change the status of the campaign to reserved status.

Note that the advertiser ID and search magnifying glass are disabled and greyed out.

Change Advertiser

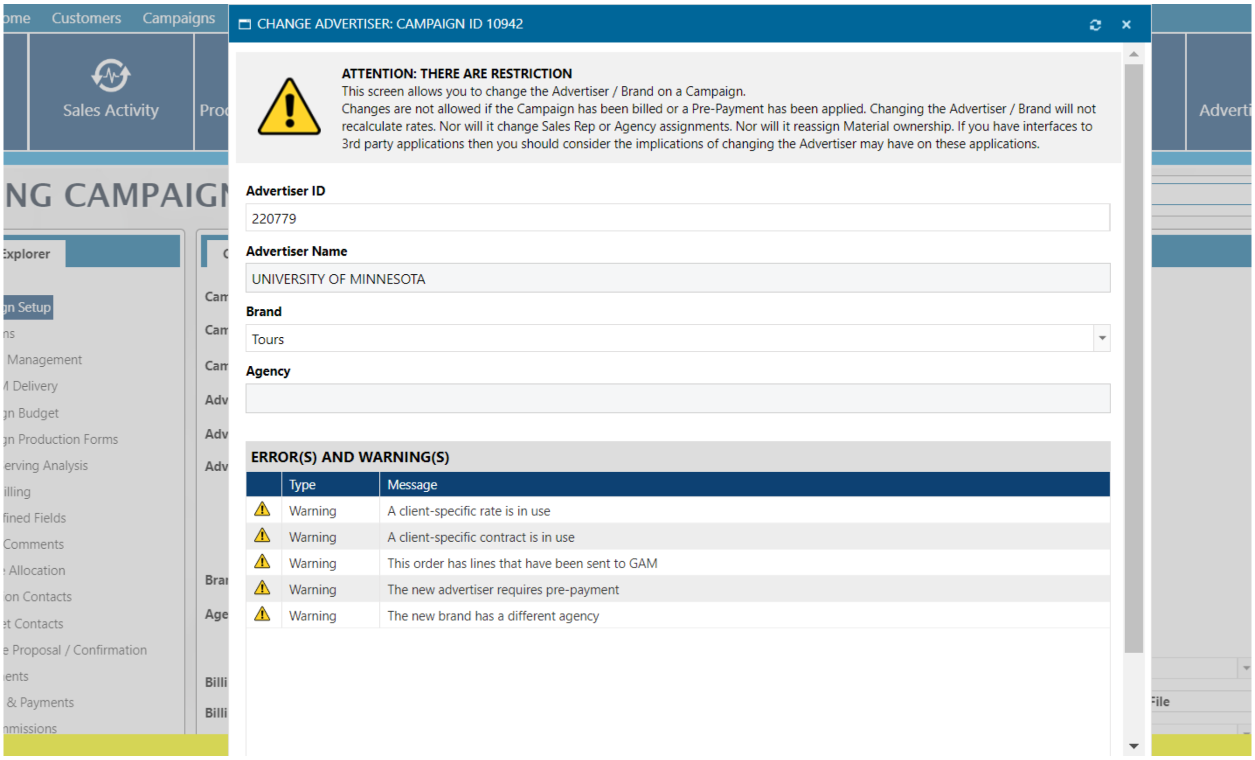
Instead of the above, reserved and unbilled confirmed campaigns will be able to have the advertiser changed from the campaign header edit options where the advertiser is locked out and disabled on a campaign based on status. This feature is not allowed on advertisers with credit stop, or billed campaigns or where a prepayment has been applied. User will receive warnings if there are conditions which should be considered apply, such as contracts applying to the client or campaigns have gone to third party interfaces.

Navigate to create a new campaign in the RE status.



Note that the Advertiser ID and Name fields are greyed out and cannot be changed.

In the Edit drop-down options, use “Change Advertiser”.

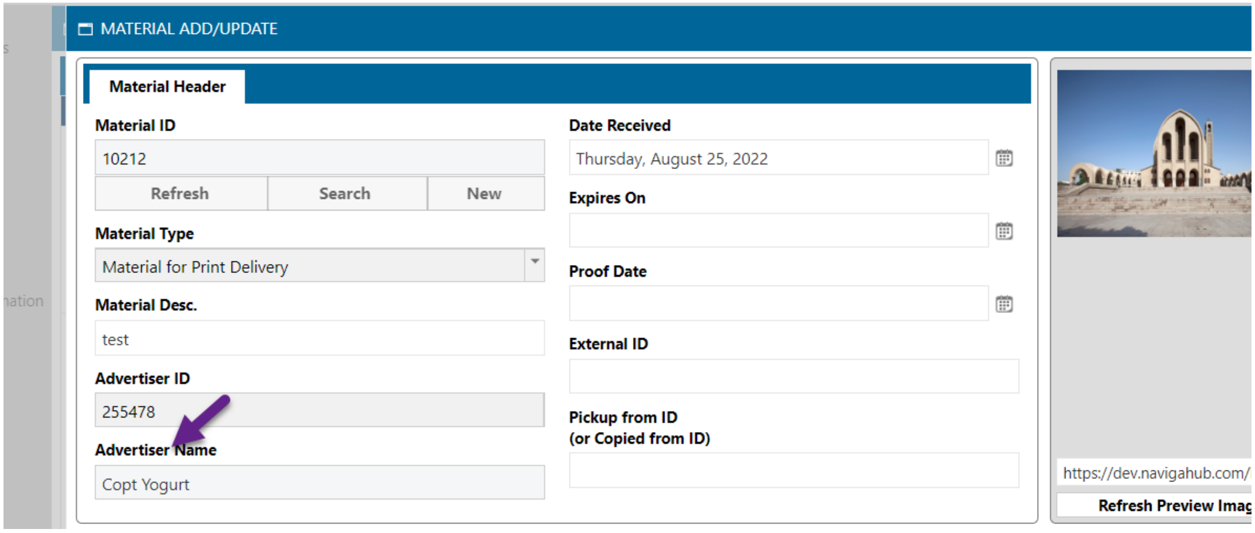


In the pop-up screen, choose the advertiser and brand to replace the existing ones on the campaign.

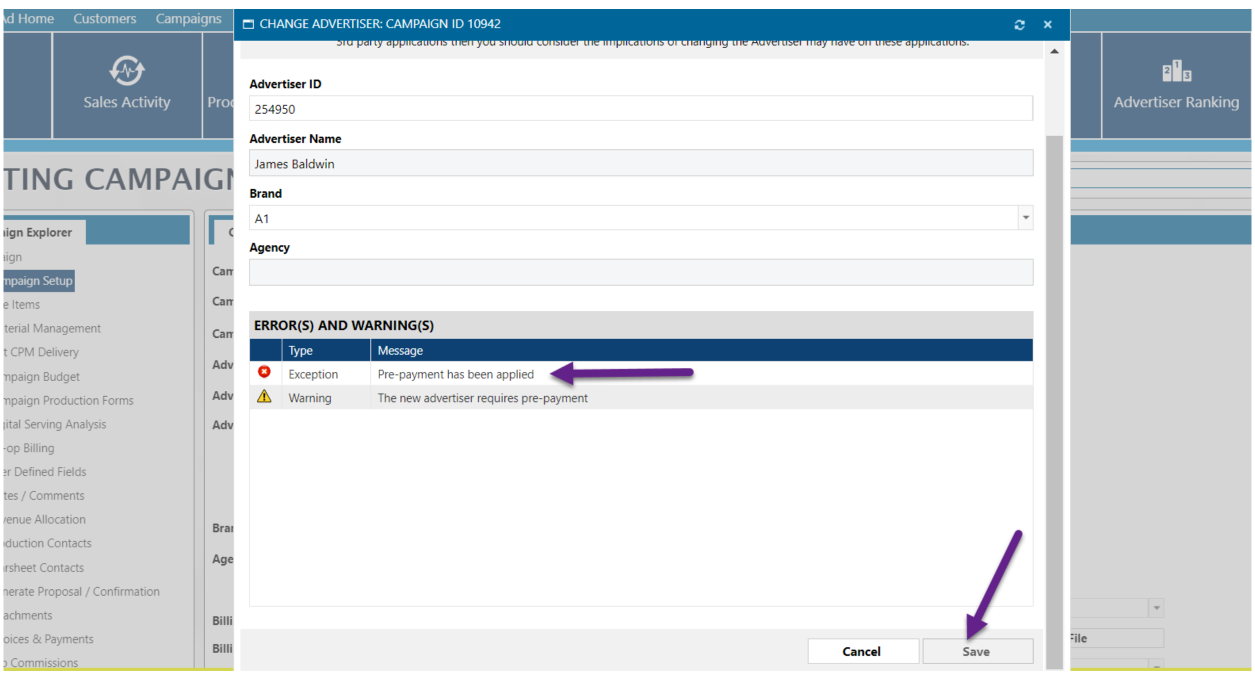
The system lists any errors which would stop you from changing the advertiser, such as credit stops or other limitations. It'll also list warnings which are for information purposes and will allow you to proceed with the change.

Edit the line item once the new advertiser has been changed and note:

1. The price on the campaign remains the same.
2. The product remains the same.
3. The Material displays as belonging to the original advertiser.



Prepay the campaign in the Invoice & Payments tab. This could be a partial prepayment. Then Change Advertiser again.

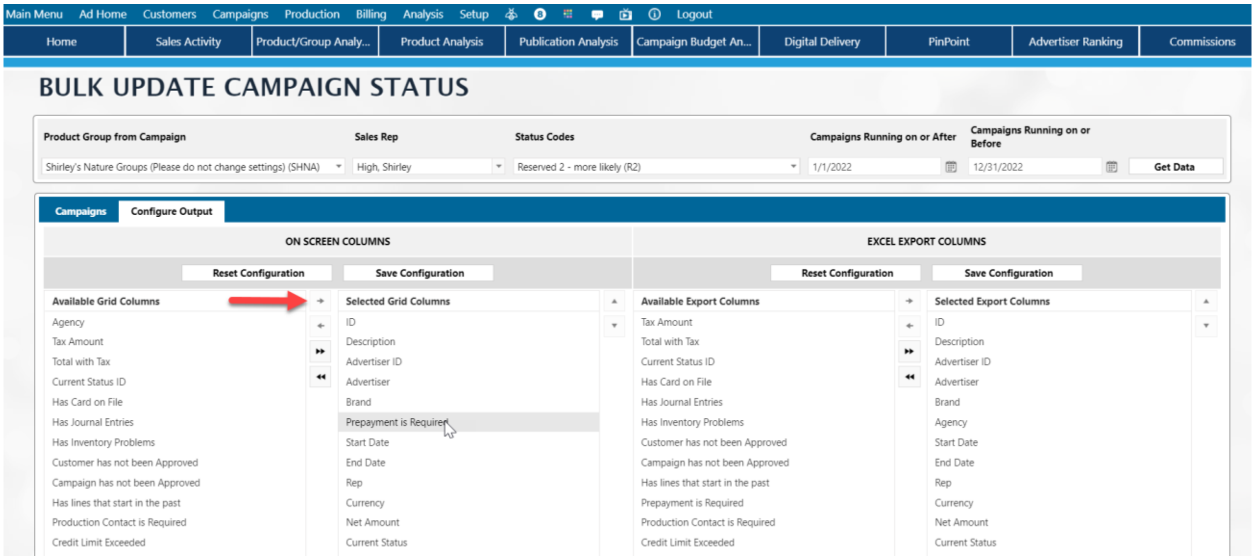


The pop-up screen displays the Error Exception of the prepayment being applied as a condition to prevent the change of advertiser. The Save button is disabled. In this case, you must remove the prepayment from the Invoices & Prepayment tab to allow for changing the advertiser. The same applies if the campaign is billed where you cannot change the advertiser.

Bulk Update Status

Bulk Status Update screen has a new configurable field to reflect the prepayment requirement.

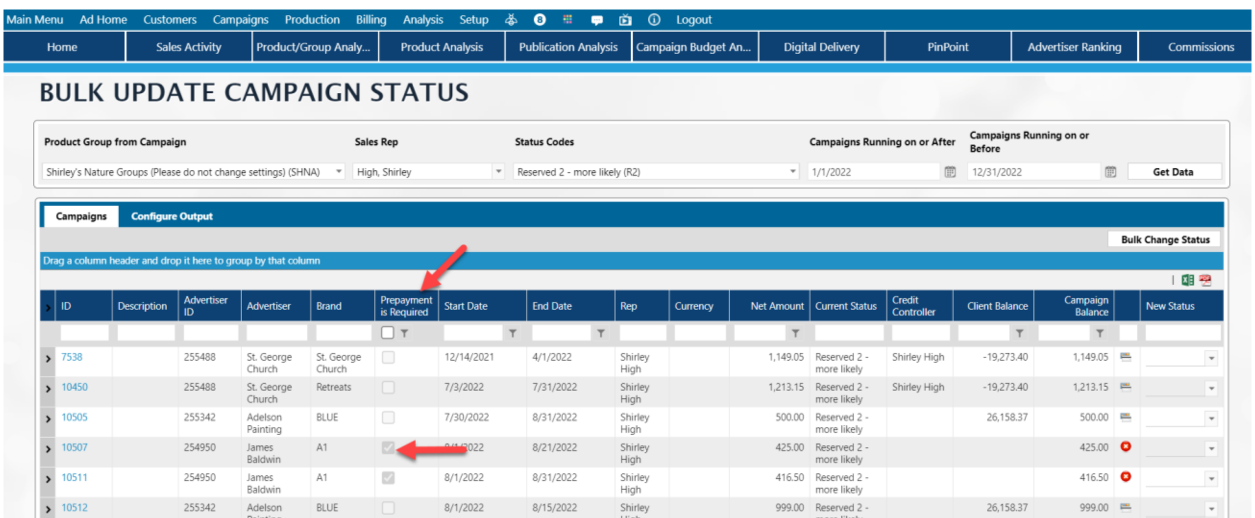
Navigate to the menu Campaigns -> Bulk Update Campaign Status and query on campaigns.



Click the tab “Configure Output” and then in the left side under Available Grid Columns click the field “Prepayment is Required” and then click the right facing arrow. Then click Save Configuration.

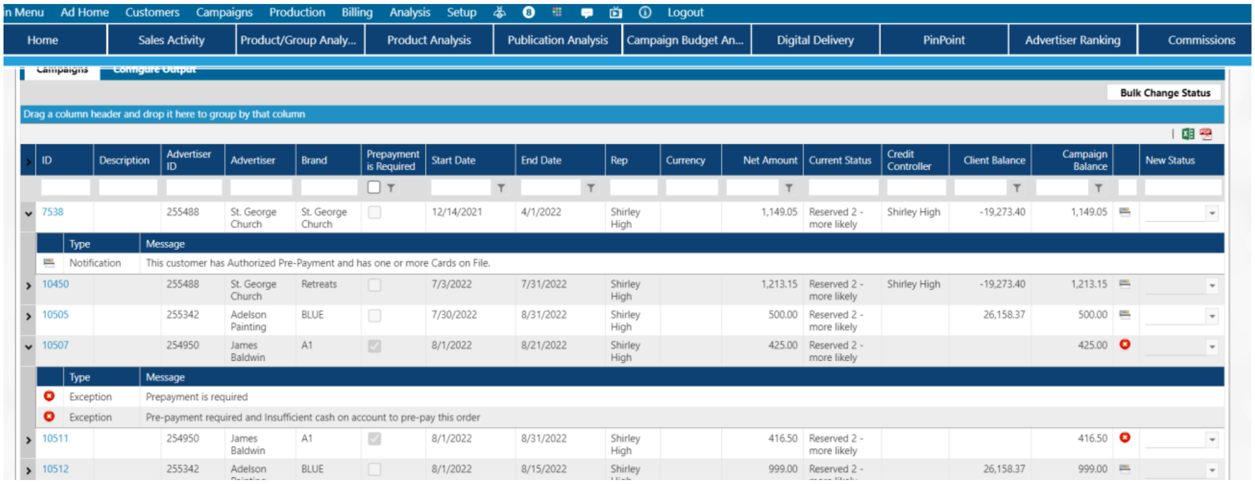
Repeat for the Excel Export Column side if you’d like the field to display in the excel export.

Click the tab “Campaigns”.



The field displays and the box is checked if there’s a prepayment required.

Click the expansion arrow on one of the records.

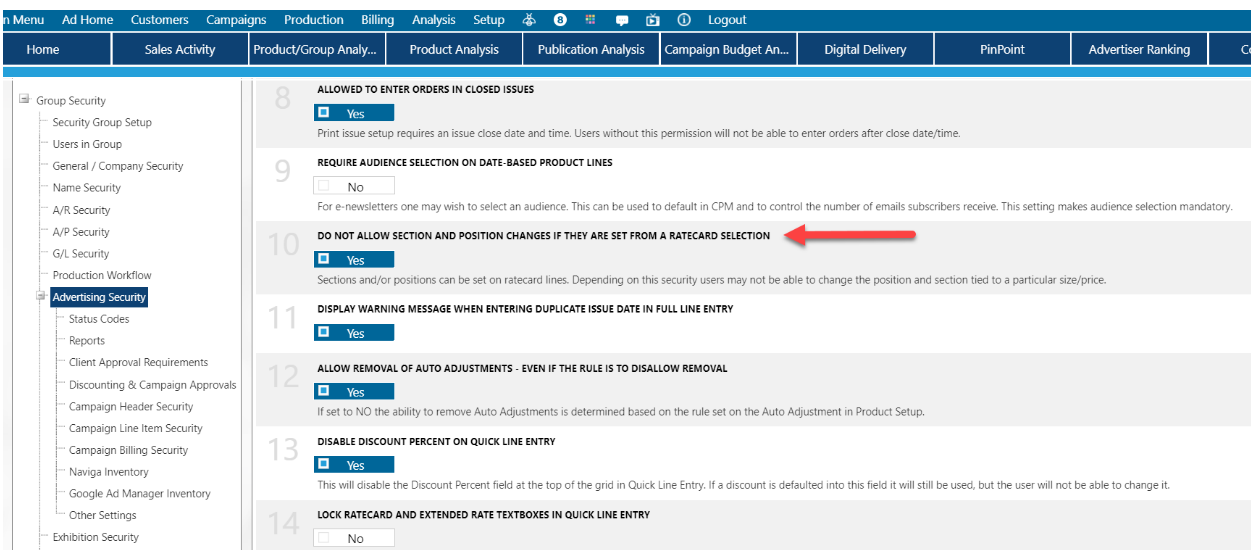


The records show a notification if it's marked as such. Other records marked with a red mark when expanded display the reason for the mark such as prepayment required but cash on account unavailable.

Security for Restricting Section and Position Change on a Campaign in Line Entry

New security flag "Do Not Allow Section and Position Changes If They Are Set from a Ratecard Selection". Since sections and/or positions can be set on Ratecard lines, then if this flag is checked, in order entry user will not be allowed to change the section and position. This overrides the flag for the same setup on a product in product setup screen in the node Positions. This applies to Full Line and Quick Line Entry in all product types and for the Ad Types: Liner Column Inch, Display, and Cost Per Thousand.

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

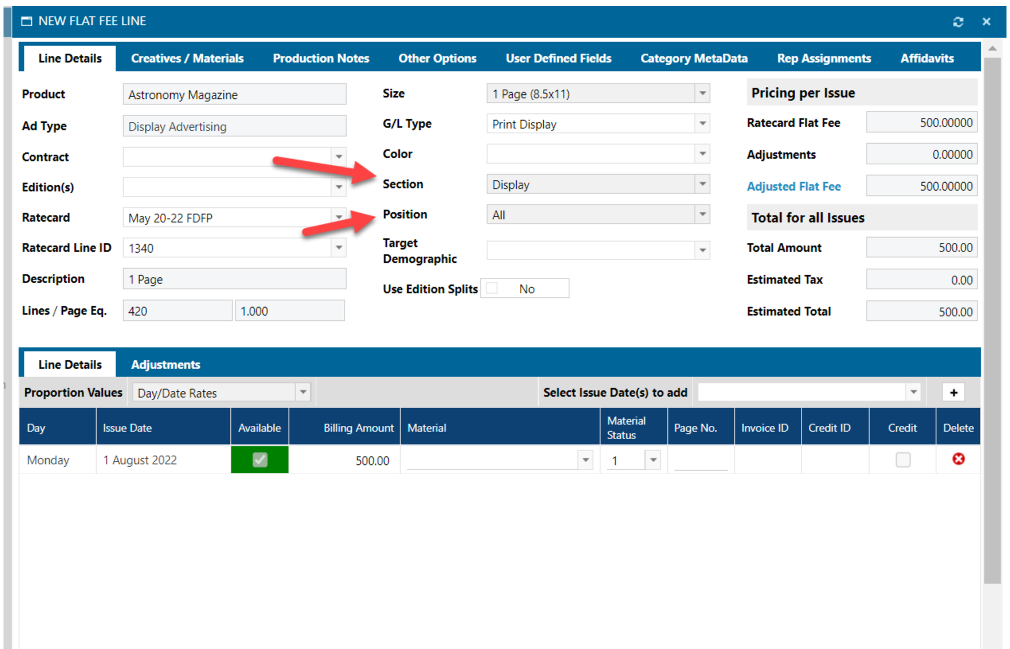


In the Campaign Line Items section, check the flag for the option "Do Not Allow Section and Position Changes if They Are Set from a Ratecard Selection". Save the security settings.

Navigate to the menu Product -> Product Setup -> Ratecards. Select a Ratecard to use in order entry.

Select the Ratecard line and define a section and position on the line. Save the Ratecard.

Enter a new campaign using this Ratecard Line.

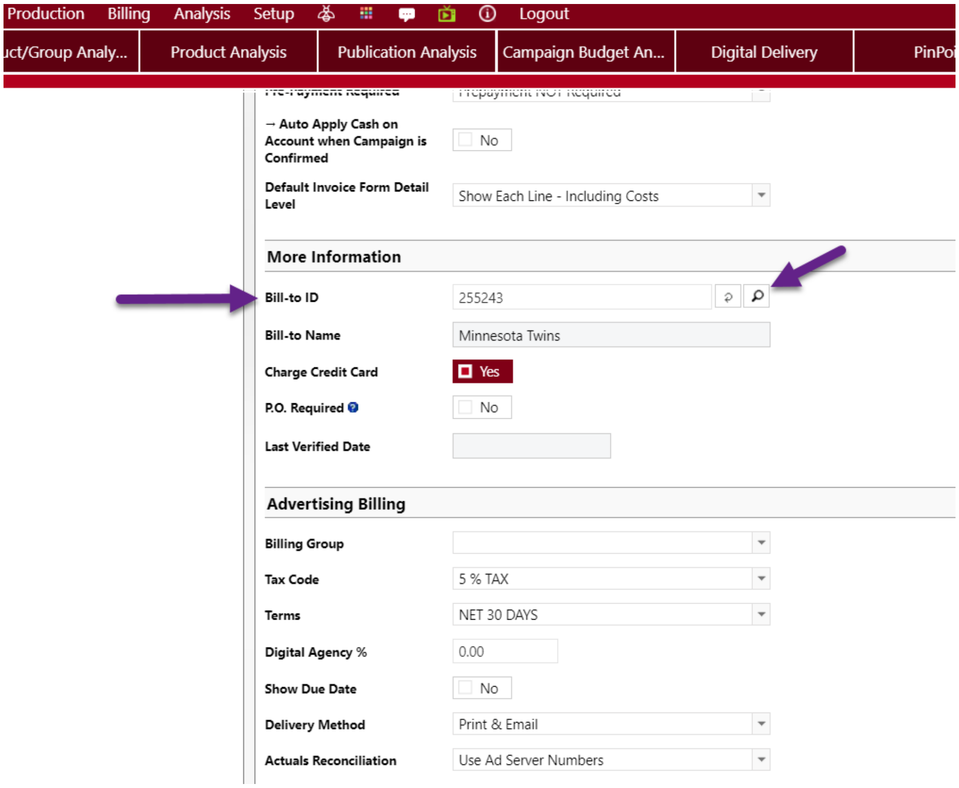


Note that the section and position fields are greyed out and disabled for any change.

Bill-To Name on Campaign

When the Bill-To company is different than the advertiser on a campaign, the campaign header displays the Bill-to name in the field "Agency/ Bill-To".

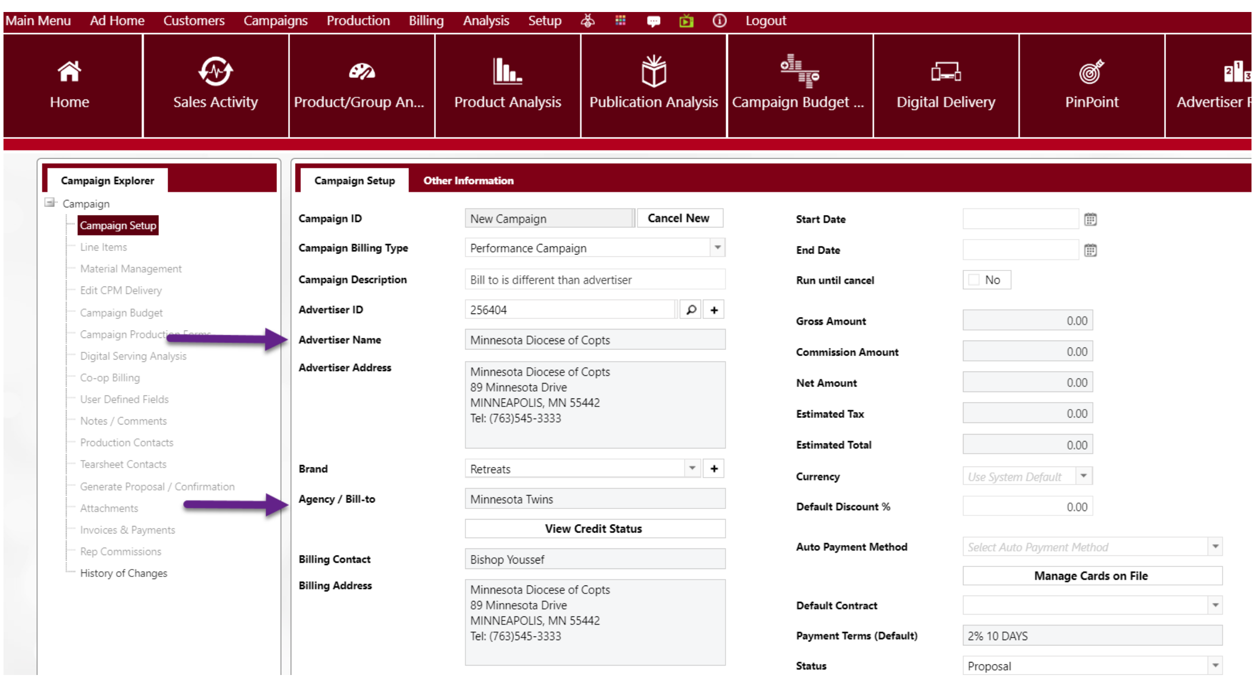
Navigate to the advertiser maintenance screen in the menu Customers -> Advertiser/ Agency Maintenance. Choose the advertiser from the drop-down and click the node "Advertising setup".



In the section titled "More Information", enter another company ID in the "Bill-to ID" field. The name of the company appears by default in the Bill-to Name" field.

Save the advertiser maintenance settings by using the save button.

Navigate to create a new campaign using the advertiser you just edited.



Note that the Agency/ Bill-to field by default has the “Bill-to” company name as per the advertiser setup.

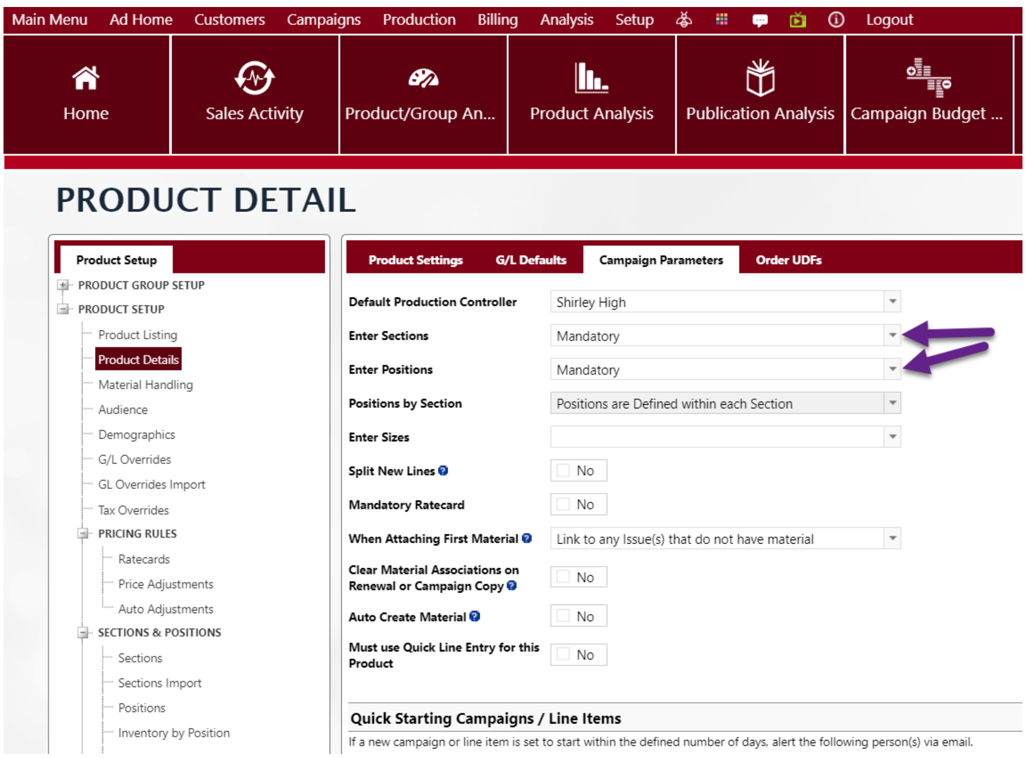
Save and complete entering the campaign with line item.

Bill the campaign and note that the billing ID on the invoice is the Agency/ Bill-to company and not the advertiser.

Booking Wizard Section Position Rules

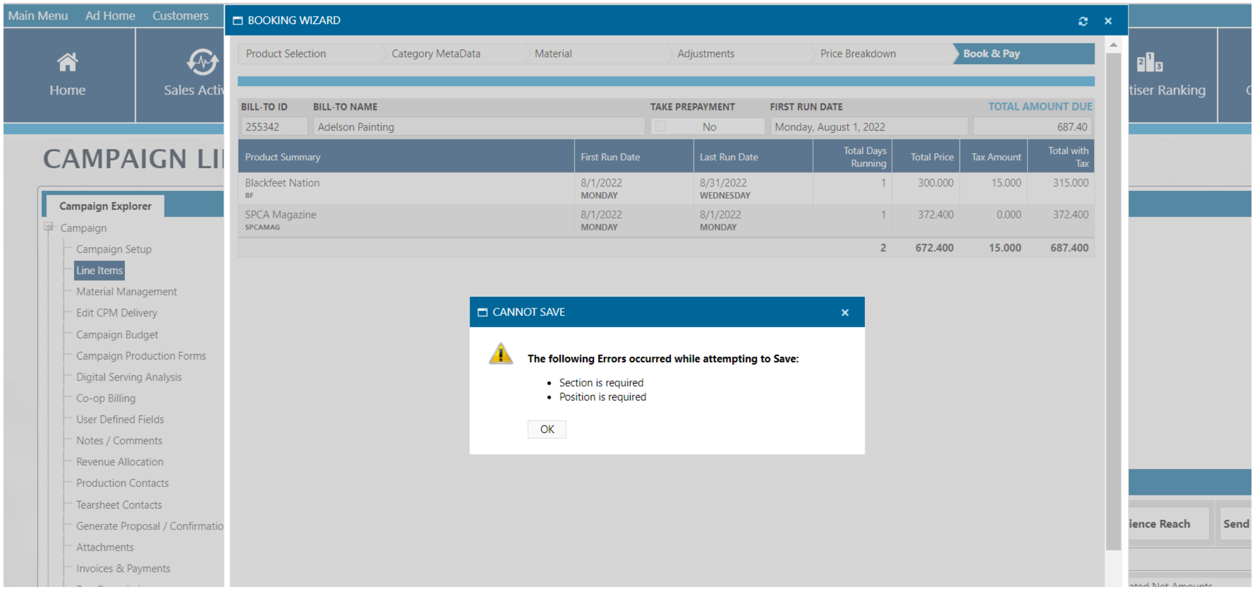
Booking Wizard order entry will take into account and enforce section and position mandate rules of the product. This applies if any of the group’s products has the section or position set as mandatory.

Navigate to the menu setup -> Product Setup -> Products Details. Choose the product from the drop-down menu and then click the tab “Campaign Parameters”.



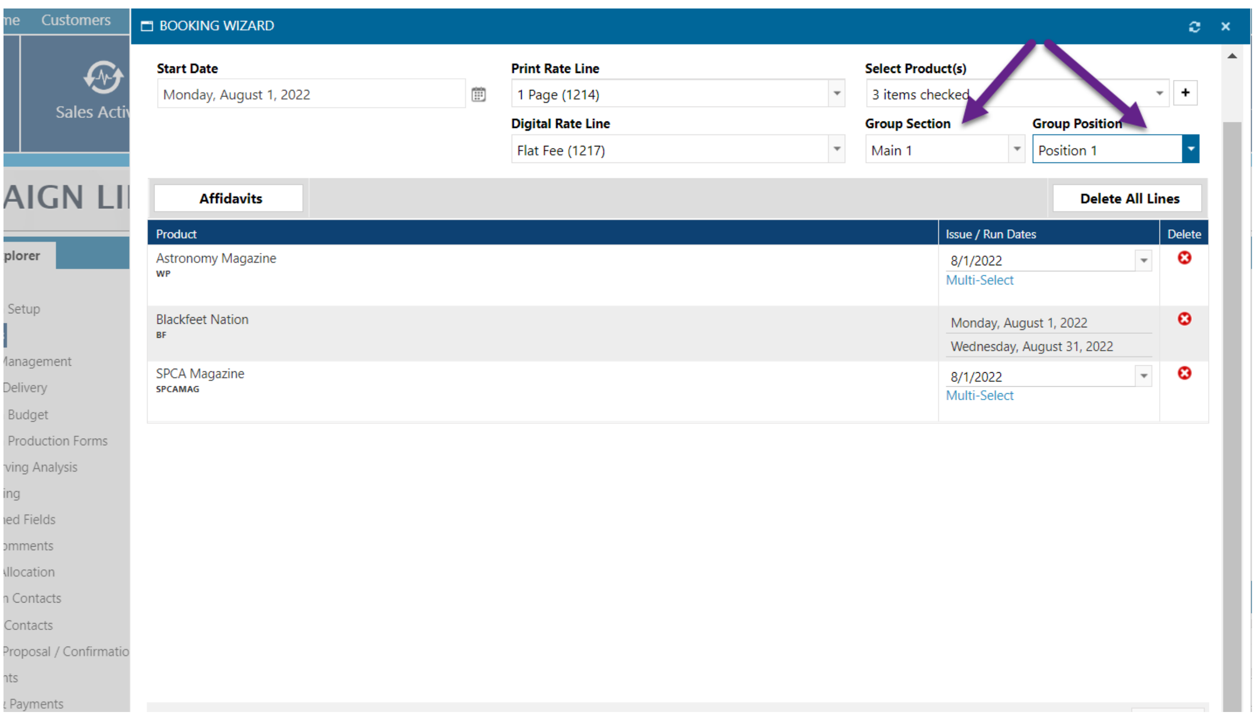
Mark the section and/ or position fields to be Mandatory. Save the settings.

Navigate to create a line item using the Booking Wizard and use the product group to which the product above belongs. You can include another product as well in the wizard where the section and position aren’t required.



Click through the tabs, and as you click to the final tab “Book & Pay” and click “Finish” the system will display an error message that Position is required and Section is required according to the product’s setting.

Click OK and click Previous until you arrive at the first screen.

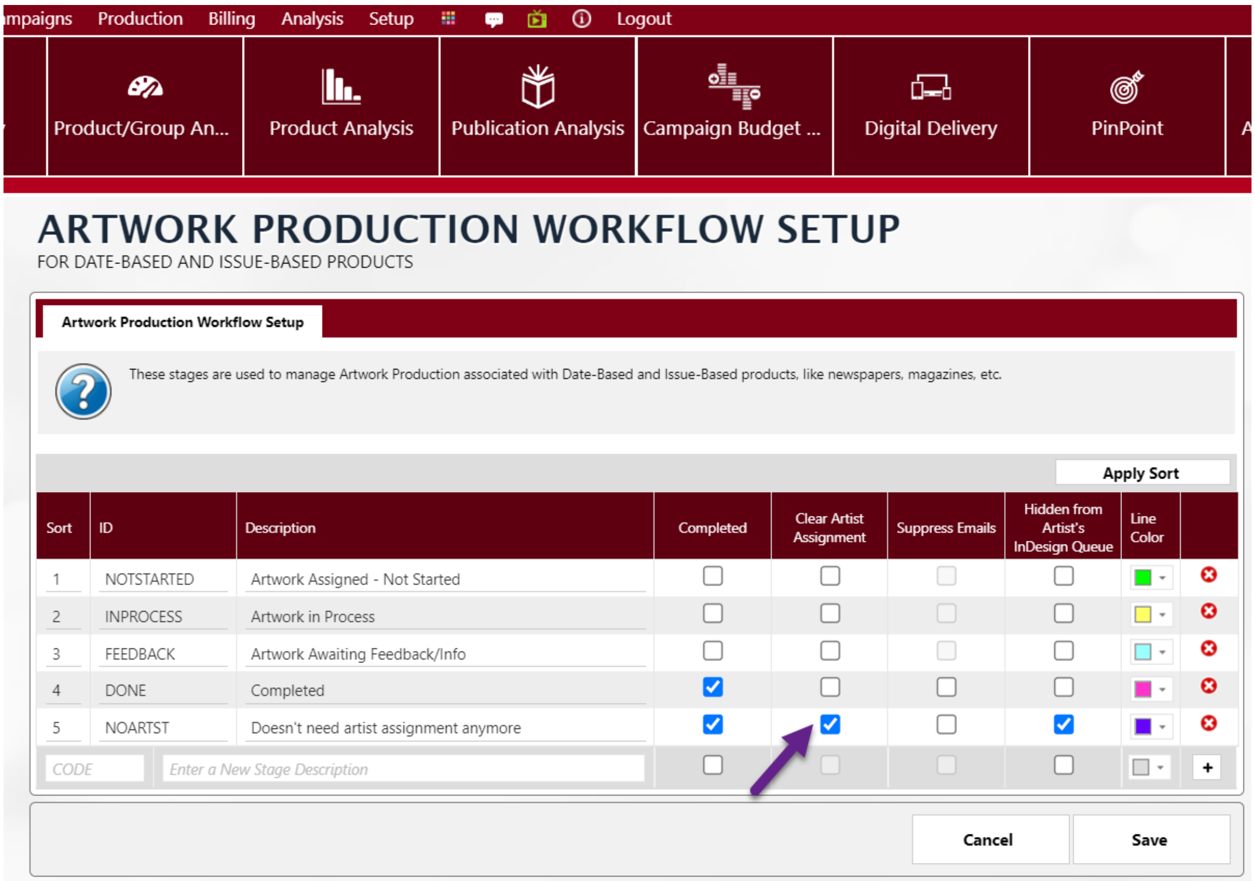


Enter the Group Section and Group Position and click Next again. At this time, the line item is saved.

Clear Artist Assignment

Artwork Production Setup new flag is available so that when tied to a status and is checked it allows the system to clear artist assignment to a piece of material. This is especially useful in the case that the material gets rejected by the client in the portal, the artwork will show up back in the unassigned queue and any artist can make the corrections needed. This allows for faster workflow if the original artist is out of the office or unavailable. For more in depth explanation, please refer to the help index document "InDesign Interface with Naviga Quick Reference Guide".

Navigate to the menu Setup -> Artwork Flow Setup -> Artwork Production Workflow Setup.

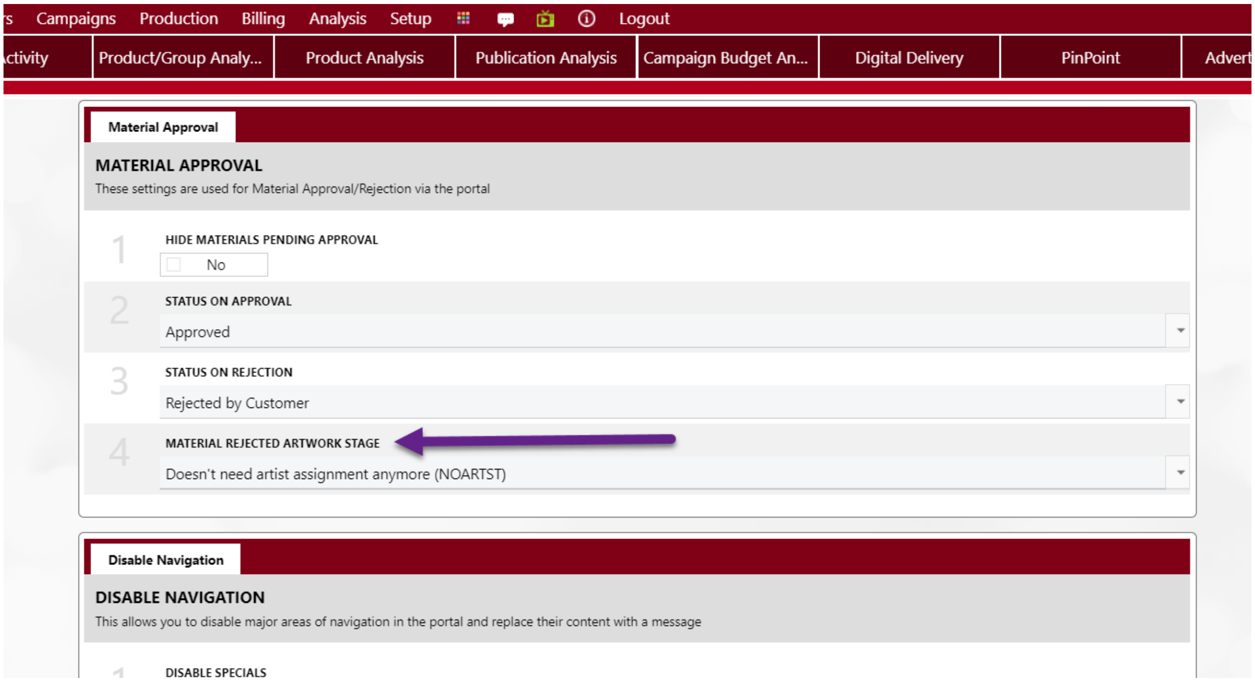


Enter a new or edit an existing step and check the flag "Completed". The "Clear Artist Assignment" flag is available to be checked. Check the flag and you can also click "Hidden from Artists' InDesign Queue" if you'd like to have this item disappear from the assigned artist's queue in InDesign.

Save the settings.

For the portal status:

Navigate to the menu Setup -> Portal Setup and scroll to the Material Approval section.



Mark the status of Material Rejected Artwork Stage to the status you marked above to remove from the artist's queue and save the setting. This step is particular to the materials submitted through the Portal.

Once material is assigned to an artist, moves to client and client marks it as rejected in the Portal, the material is removed in InDesign from this artist's queue and another can see it and work on correcting it.

Suppress Zero Invoices which are Prepaid

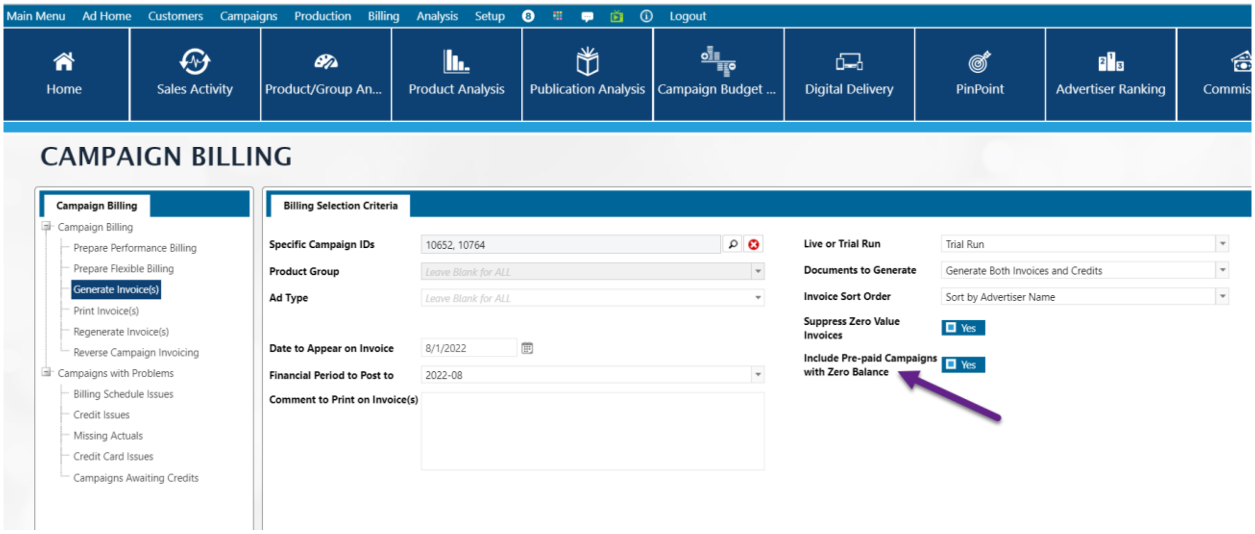
Option to Include the Prepaid campaigns of zero values due, in the option to Suppress Zero Value Invoices in Billing. Previously these prepaid campaigns were included and generating zero due invoice PDFs. When the flag is checked "Yes" the system will not generate invoices of these $0 value prepaid campaigns in the full printable PDF for the batch, but if user opens the link for the individual invoices, it does generate them there. It also links it to the campaign as an invoice PDF with $0 due.

Navigate to create a campaign with a line item of any Ad Type.

Prepay the campaign in full in the "Invoice & Payments" node on the campaign by check or card.

Navigate to bill the campaign in the menu Billing -> Prepare Campaign.

Click the node to Generate Invoices and enter the search criteria to include this campaign as well as others which aren't prepaid.



Check the box “Suppress Zero Value Invoices” and the new flag “Include Pre-paid Campaigns with Zero Balances” displays. Check the flag to exclude the prepaid campaigns with $0 balance.

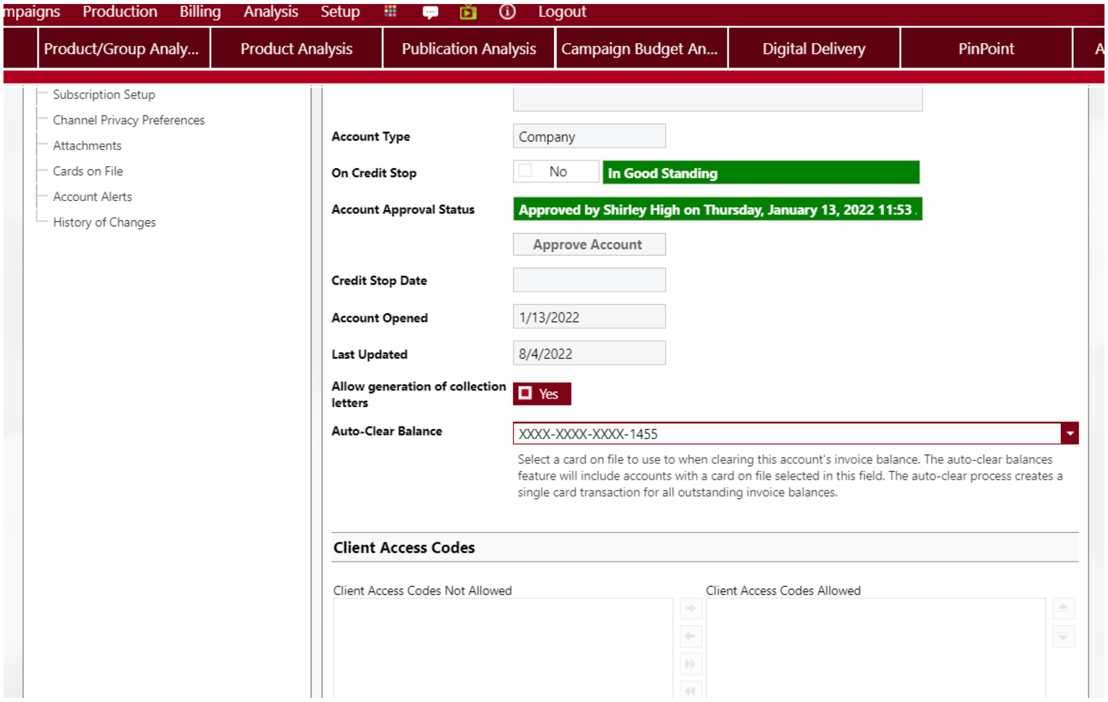
The pop-up confirmation box displays all invoices regardless of the value on them.

Click “Print Invoices” to view the batch. The batch will not include the prepaid campaigns.

Auto Clear Balance

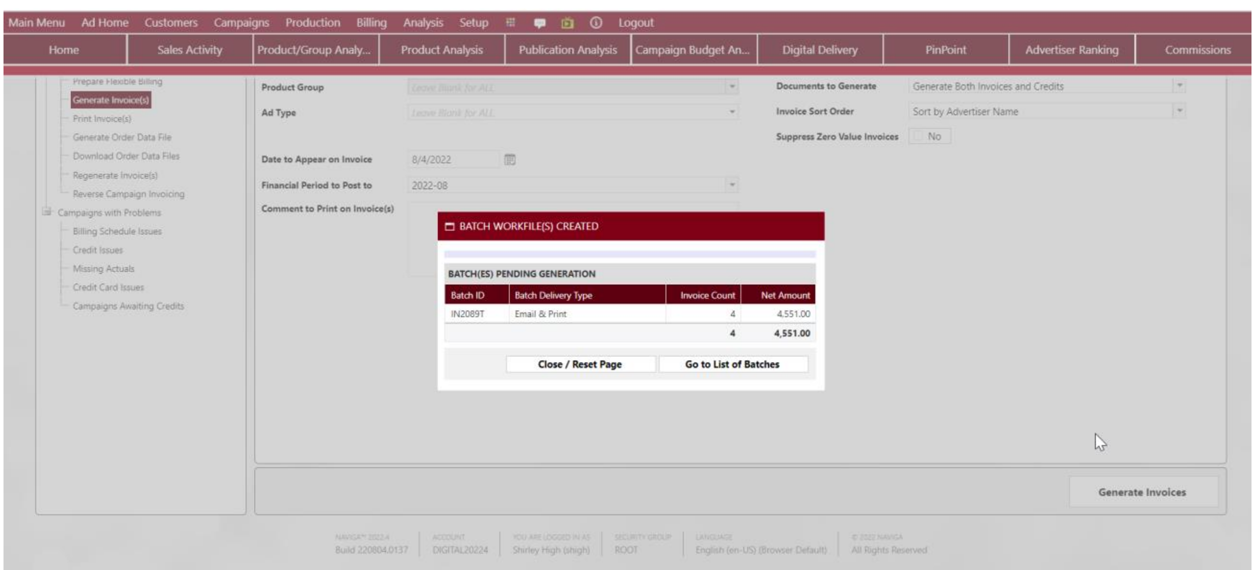
A new option on Advertiser Maintenance screen called “Auto-Clear Balance” which allows user to select credit card on file to use to when clearing this account's invoice balance. The auto-clear process creates a single card transaction for all outstanding invoice balances.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance and click the “AR setup” node.

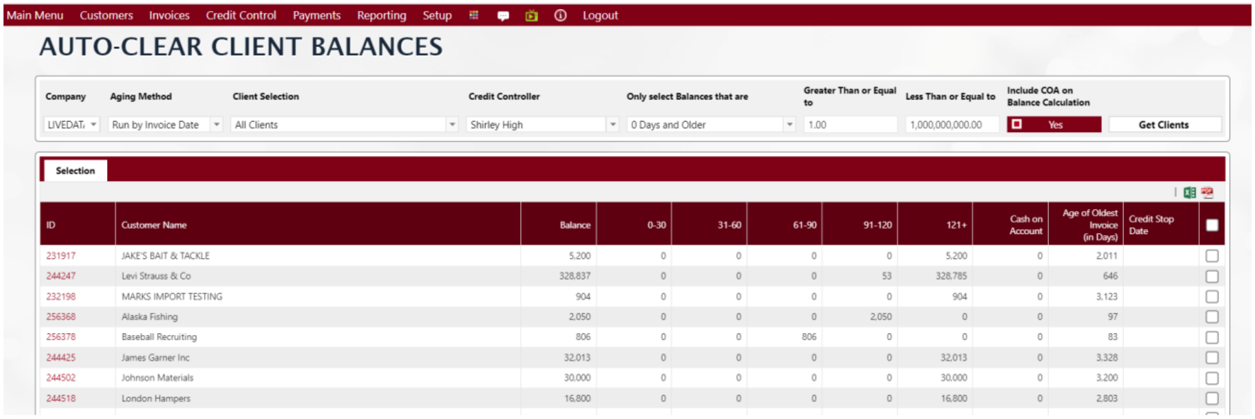


Scroll to the field “Auto-Clear Balance” and choose the credit card on file. If the client doesn’t have one, it can be added in the node “Cards on File”. Save the settings.

Bill multiple campaigns for a client and note the amounts due.



Navigate to the AR menu Payments -> Auto Clear Balances and query on the company, credit controller and amounts.

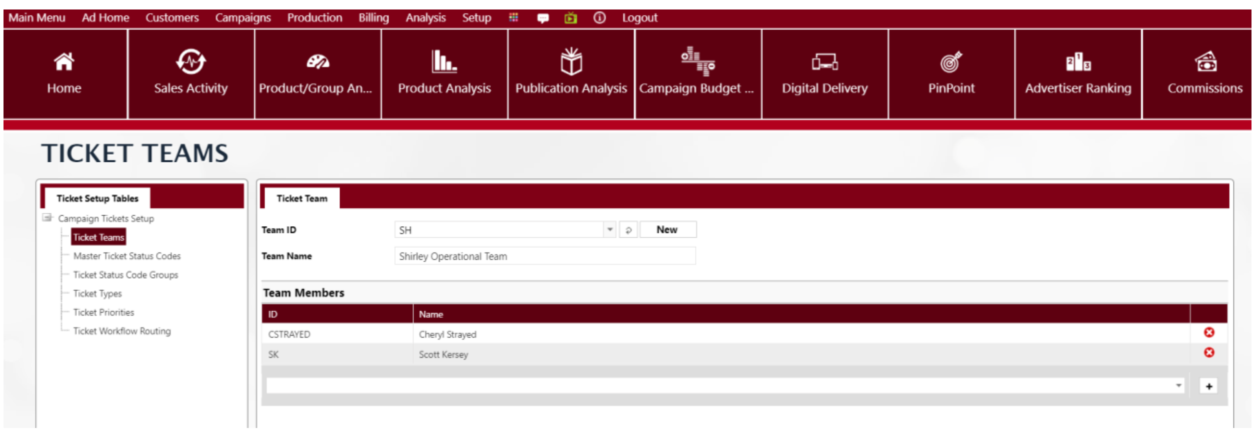


Check the applicable boxes for the clients and click Process Payment. You can then view the processed payments using the card on file under the menu Payments.

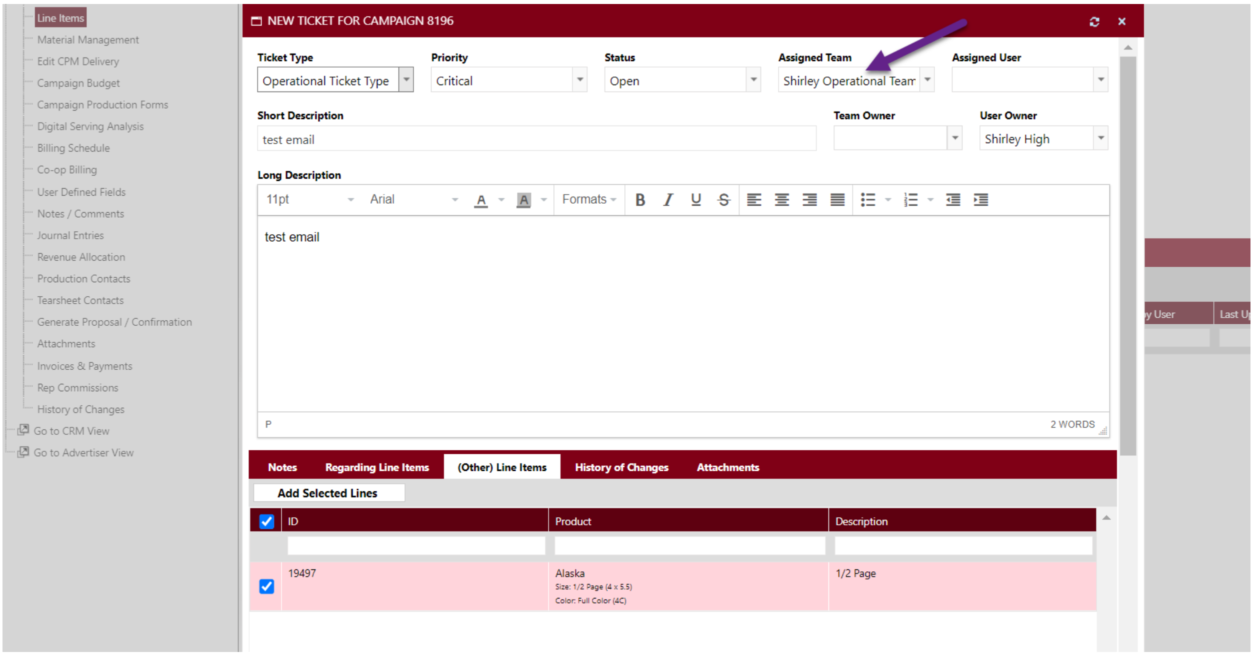
Tickets Email

On creating a new ticket, the system by default creates and sends an email to the group or user assigned the ticket.

Navigate to the menu Setup -> Advertising System -> Ticket Type Setup. In the teams' node, create a team and team members. Save the settings.

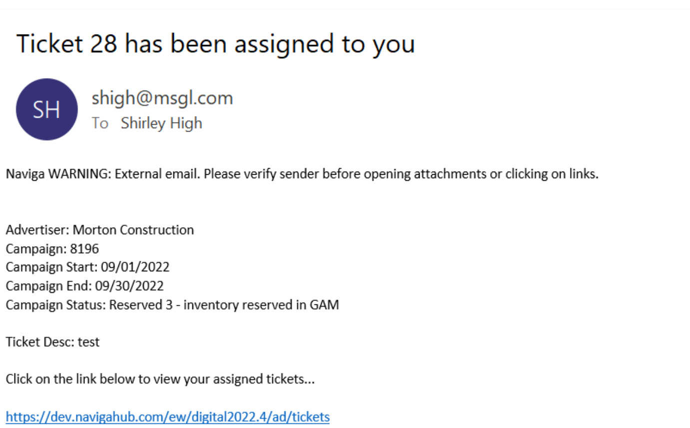


Create a campaign and add a ticket to the line item.



Save the ticket.

Check the email Inbox of the Assigned Team members and note that each receive an email notification of the ticket.


Ticket 28 has been assigned to you

SH shigh@msgl.com
To Shirley High

Naviga WARNING: External email. Please verify sender before opening attachments or clicking on links.

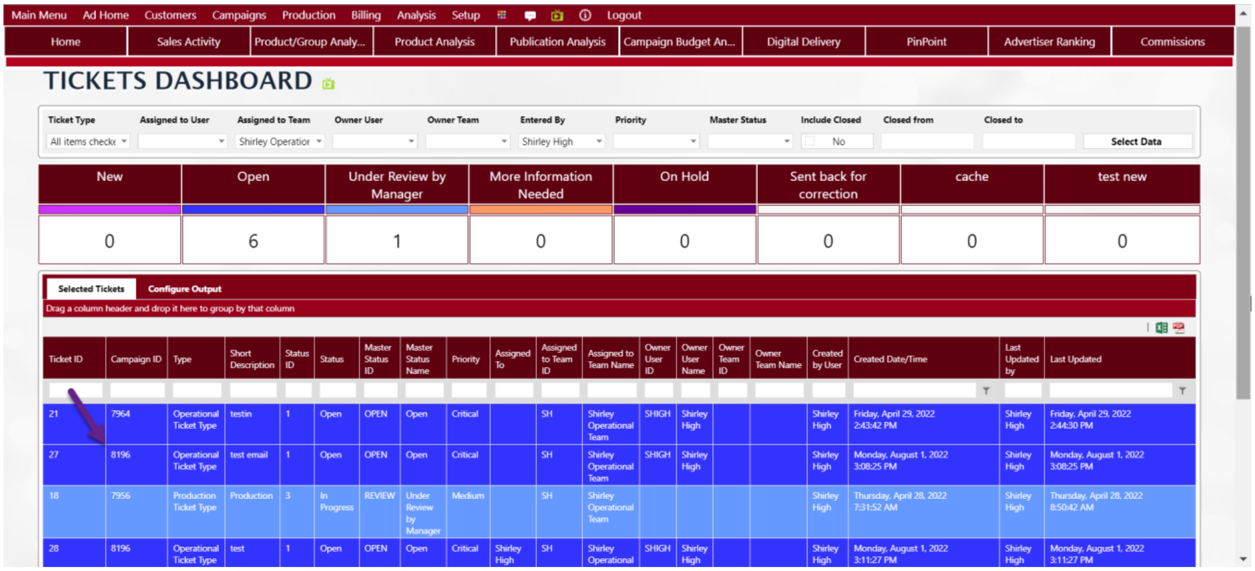
Advertiser: Morton Construction
Campaign: 8196
Campaign Start: 09/01/2022
Campaign End: 09/30/2022
Campaign Status: Reserved 3 - inventory reserved in GAM

Ticket Desc: test

Click on the link below to view your assigned tickets...

https://dev.navigahub.com/ew/digital2022.4/ad/tickets

The URL in the Inbox email, if you click it, the screen opens to the ticket dashboard.

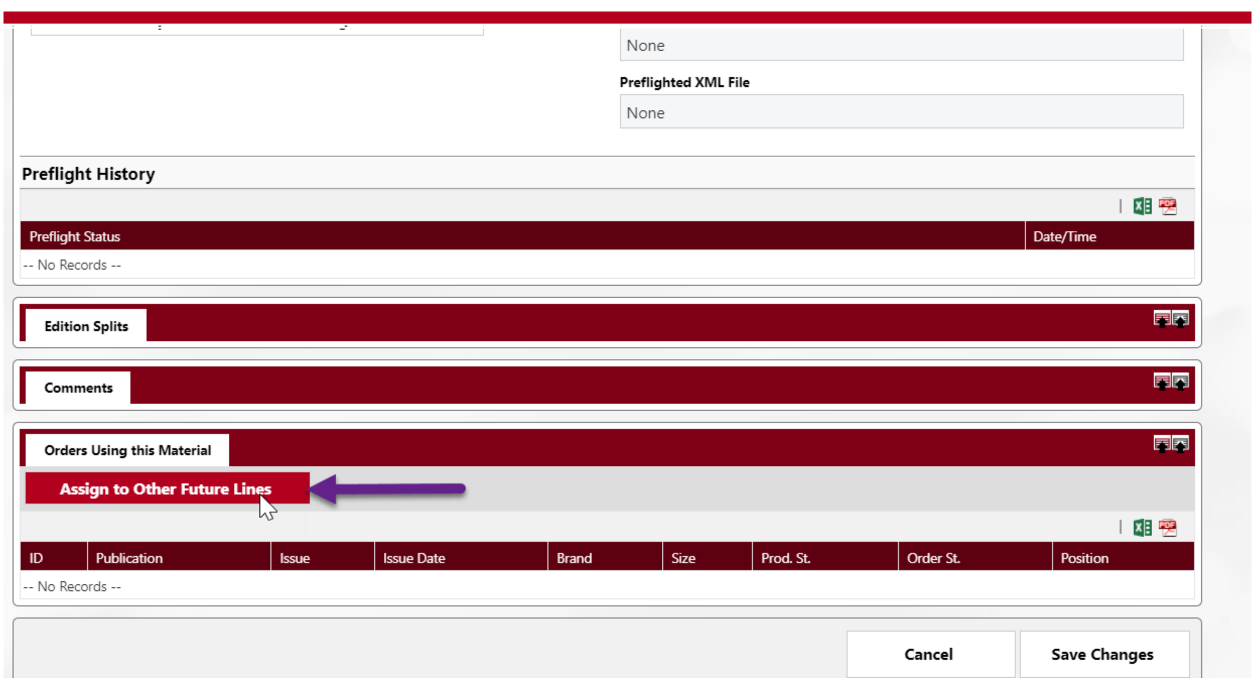


Search for the ticket as per the criteria fields and it will display.

Attach Material to Multiple Campaigns

Material Maintenance allows for attaching a piece of material to multiple future campaigns in one step. This applies only to Print Ad lines. Another prerequisite condition is that no materials are associated with the lines on these campaigns. The future campaigns must be in RE or CO status to allow for attaching to the campaigns.

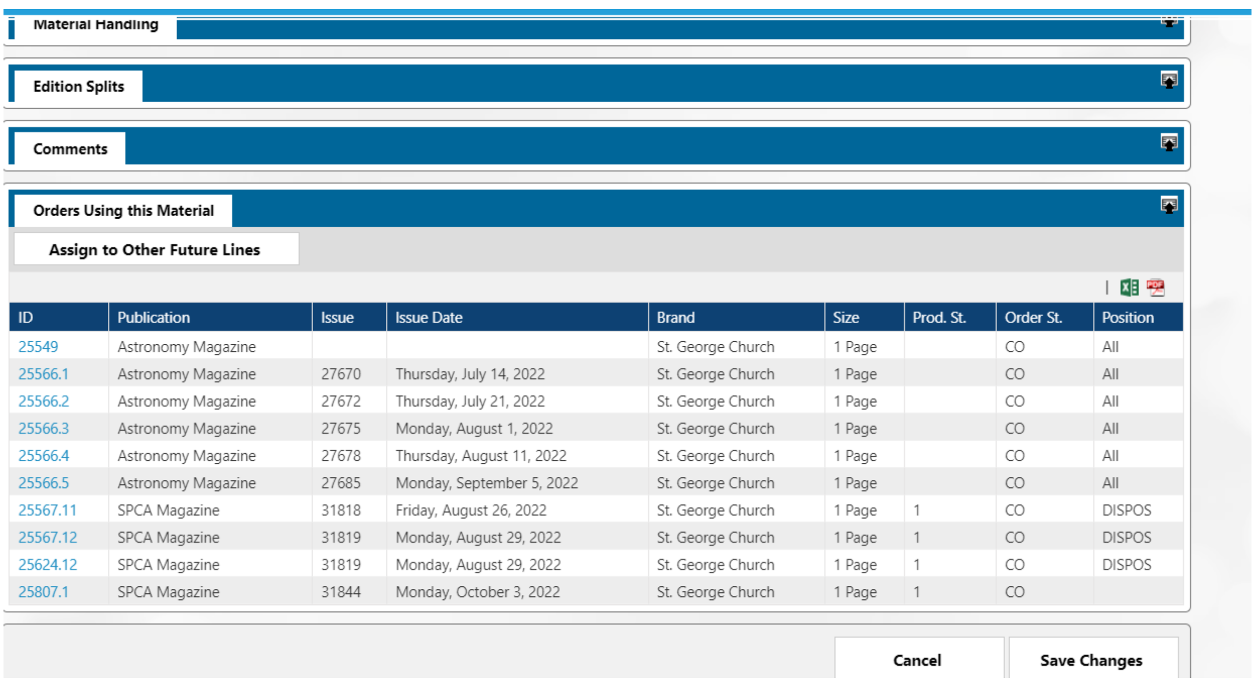
Navigate to the menu Production -> New Material.



Create the components of the material record and save it. Then in the tab “Orders Using this Material” click the “Assign to Other Future Lines” button.

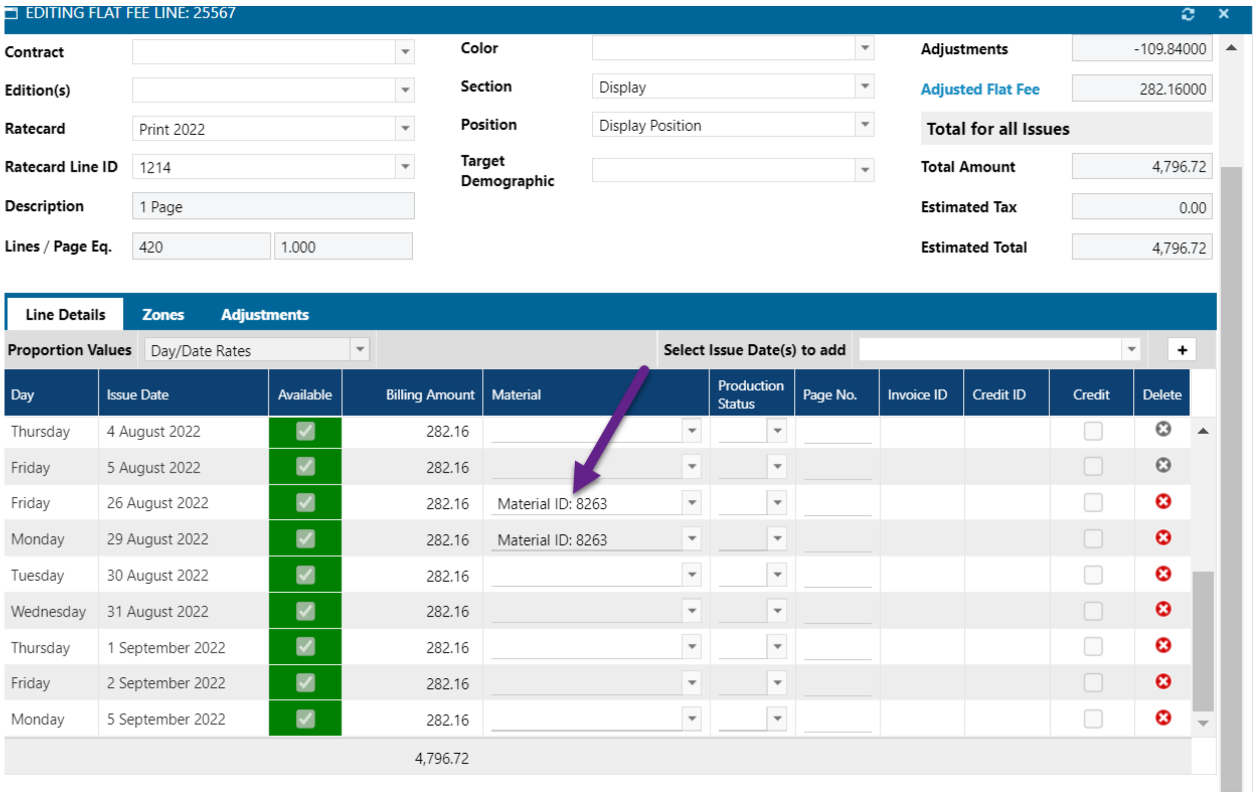
Campaign	Campaign Description	Line No.	Line Desc.	Product ID	Product	Issue Date	Due Date	Campaign Status ID
9704		25567.11	1 Page	SPCAMAG	SPCA Magazine	8/26/2022	8/26/2022	CO
9704		25567.12	1 Page	SPCAMAG	SPCA Magazine	8/29/2022	8/29/2022	CO
9704		25567.13	1 Page	SPCAMAG	SPCA Magazine	8/30/2022	8/30/2022	CO
9704		25567.14	1 Page	SPCAMAG	SPCA Magazine	8/31/2022	8/31/2022	CO
9704		25567.15	1 Page	SPCAMAG	SPCA Magazine	9/1/2022	9/1/2022	CO
9704		25567.16	1 Page	SPCAMAG	SPCA Magazine	9/2/2022	9/2/2022	CO
9704		25567.17	1 Page	SPCAMAG	SPCA Magazine	9/5/2022	9/5/2022	CO
9726		25624.11	1 Page	SPCAMAG	SPCA Magazine	8/26/2022	8/26/2022	CO
9726		25624.12	1 Page	SPCAMAG	SPCA Magazine	8/29/2022	8/29/2022	CO
9726		25624.13	1 Page	SPCAMAG	SPCA Magazine	8/30/2022	8/30/2022	CO
9726		25624.14	1 Page	SPCAMAG	SPCA Magazine	8/31/2022	8/31/2022	CO
9726		25624.15	1 Page	SPCAMAG	SPCA Magazine	9/1/2022	9/1/2022	CO
9726		25624.16	1 Page	SPCAMAG	SPCA Magazine	9/2/2022	9/2/2022	CO
9726		25624.17	1 Page	SPCAMAG	SPCA Magazine	9/5/2022	9/5/2022	CO
9824		25807.1	1 Page	SPCAMAG	SPCA Magazine	10/3/2022	10/3/2022	CO

Check the boxes of the line items per campaign you’d like to attach this material to and click “Assign”.



ID	Publication	Issue	Issue Date	Brand	Size	Prod. St.	Order St.	Position
25549	Astronomy Magazine			St. George Church	1 Page		CO	All
25566.1	Astronomy Magazine	27670	Thursday, July 14, 2022	St. George Church	1 Page		CO	All
25566.2	Astronomy Magazine	27672	Thursday, July 21, 2022	St. George Church	1 Page		CO	All
25566.3	Astronomy Magazine	27675	Monday, August 1, 2022	St. George Church	1 Page		CO	All
25566.4	Astronomy Magazine	27678	Thursday, August 11, 2022	St. George Church	1 Page		CO	All
25566.5	Astronomy Magazine	27685	Monday, September 5, 2022	St. George Church	1 Page		CO	All
25567.11	SPCA Magazine	31818	Friday, August 26, 2022	St. George Church	1 Page	1	CO	DISPOS
25567.12	SPCA Magazine	31819	Monday, August 29, 2022	St. George Church	1 Page	1	CO	DISPOS
25624.12	SPCA Magazine	31819	Monday, August 29, 2022	St. George Church	1 Page	1	CO	DISPOS
25807.1	SPCA Magazine	31844	Monday, October 3, 2022	St. George Church	1 Page	1	CO	

The screen refreshes with all the records of line items to which this material is now attached.



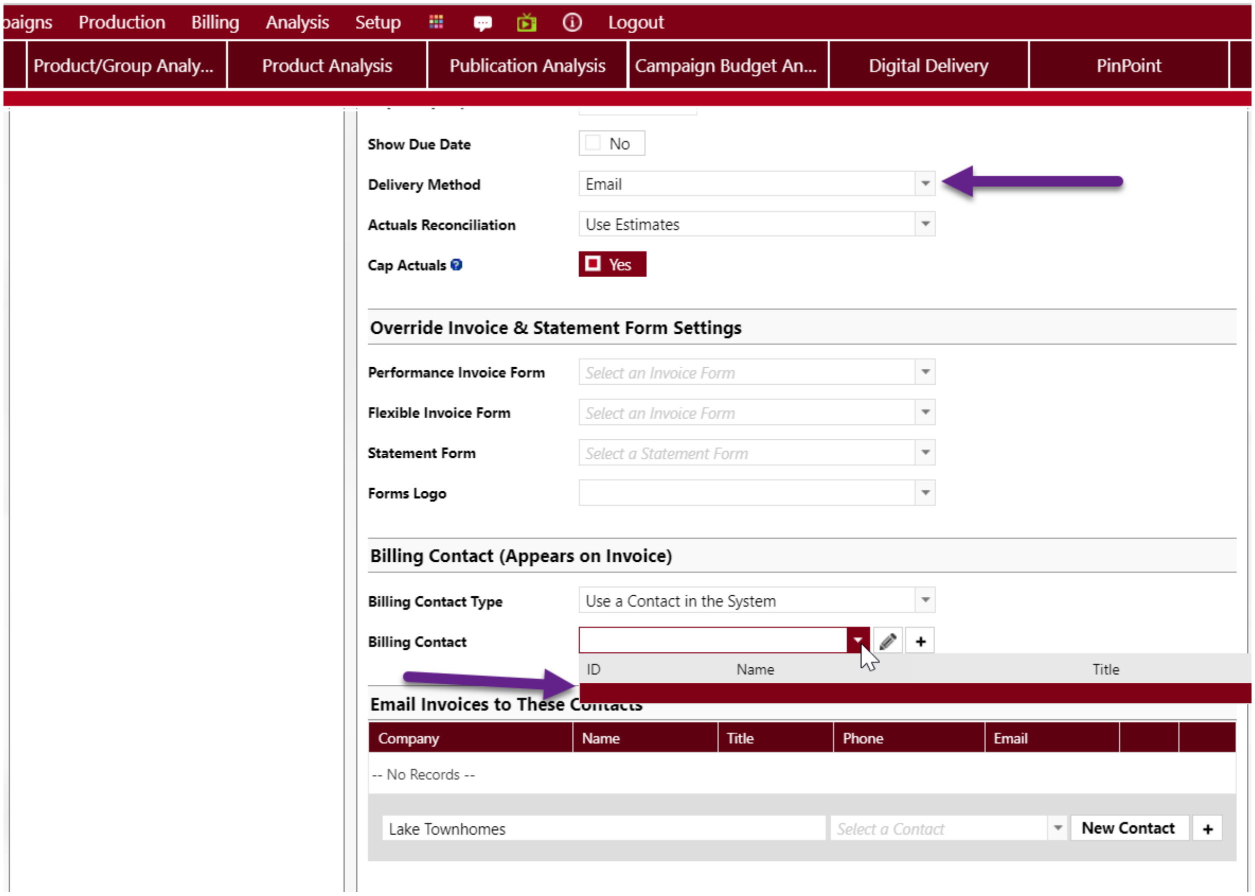
You can click the hyperlink to any and view the material on the line item. Note the Material ID displays on the line details.

Email Delivery Flag for Advertisers without Contact

New setup flag which when checked allows an email invoice delivery method to be set on the advertiser maintenance screen even if there is no billing contact on record for that advertiser.

Navigate to the menu Setup -> Advertiser Setup -> System Parameters and scroll to the General Settings section where the flag "ALLOW EMAIL INVOICE DELIVERY METHOD WITHOUT BILLING CONTACT ON CUSTOMER SETUP" is and check the flag to say "Yes".

Save the settings. Then navigate to an account without a contact or create a new advertiser in the menu Customers -> Advertiser Agency Maintenance -> Click the + sign and create a new account but do not enter any contacts or employees for the record.

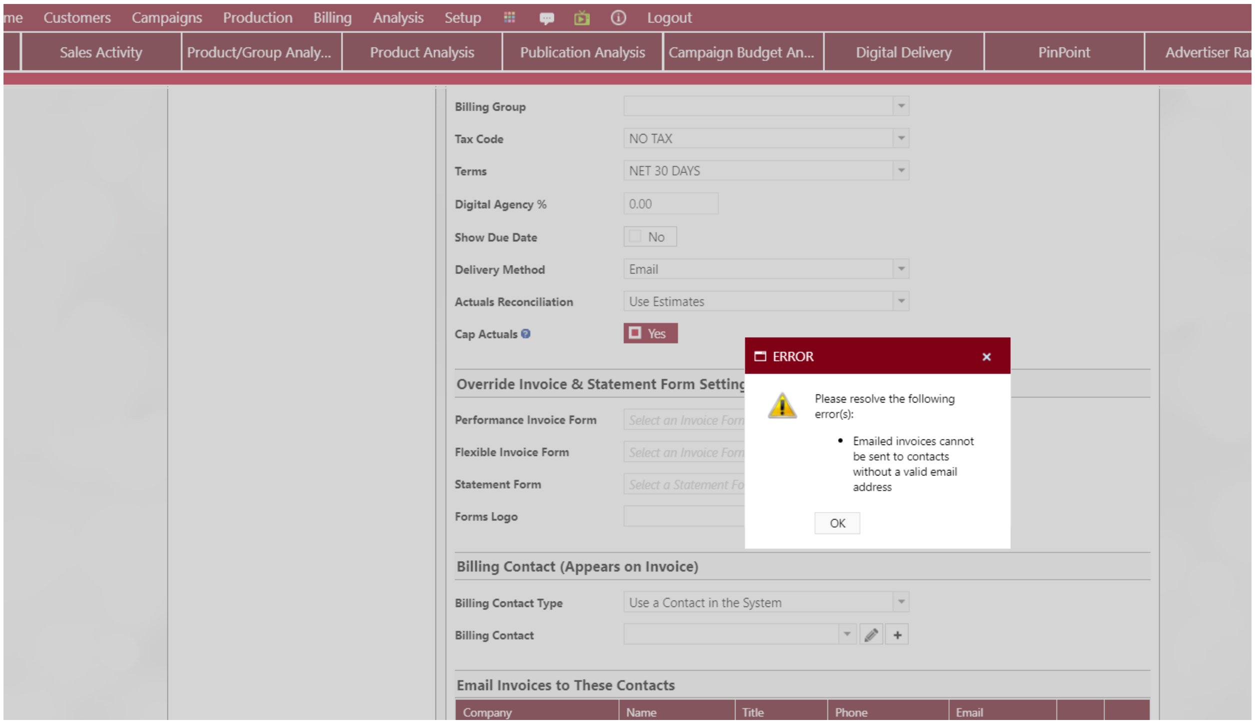


In the Advertising Setup node, choose the Delivery Method option of Email or Print & Email. Note that there is no Billing Contact in the system in the drop-down to choose. Save the settings by pressing the Save button.

The account is saved with no errors. Note that this does not apply to the AR Setup node Billing options for miscellaneous invoice or statement.

Return to the System Parameters menu and uncheck the flag to say “No”. Save the settings.

Navigate back to the advertiser maintenance screen and click the Advertising Setup node on the tree.



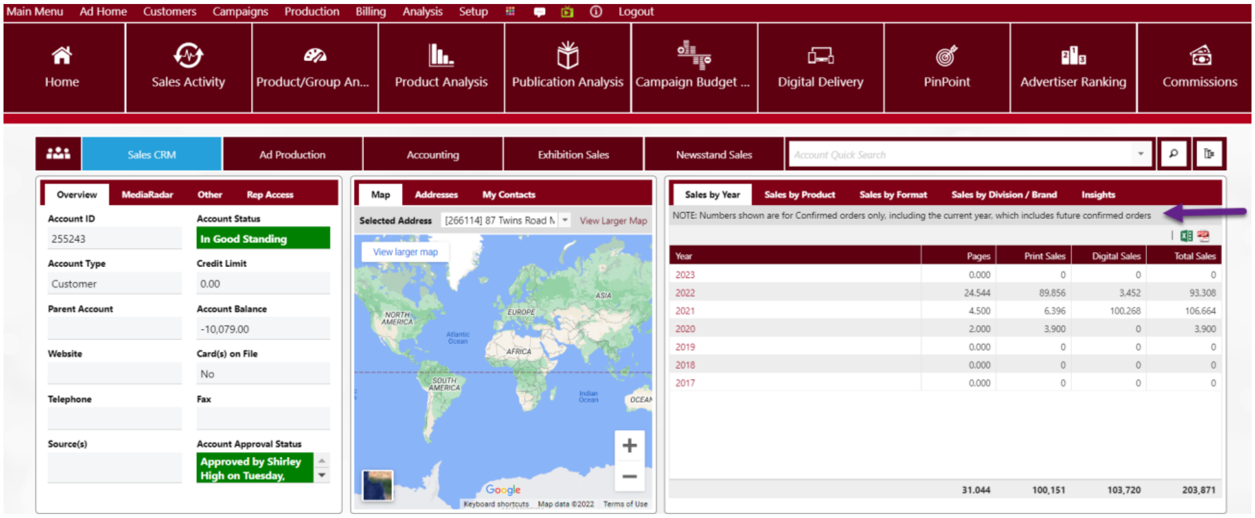
Make any change on the screen such as tax code or other and leave the setting for the Delivery Method to be Email. Click the save button. An error displays that indicates that you must enter a valid email address for a contact.

Flag to Display Confirmed Amounts Only on CRM Sales Customer Overview Screen

Navigate to the menu Setup -> Admin -> Group security -> CRM Security node.

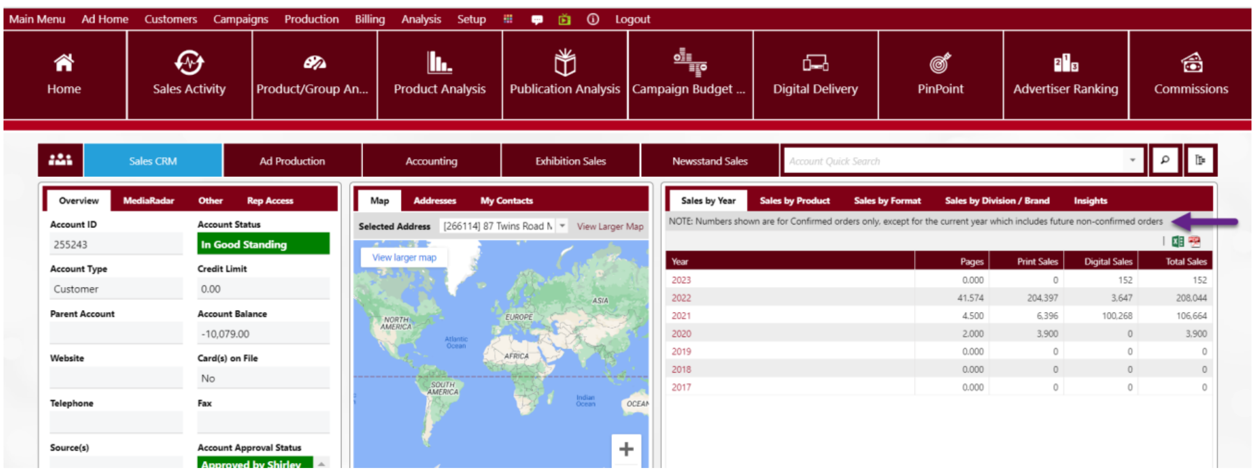
Scroll to the flag “Include Only Confirmed Future Orders on CRM Client Overview Screen (Top Right Panel)”. Check to “Yes”, the CRM Sales tab, on the Customer Overview screen shows the Sales with future confirmed orders only and not any other statuses. Save the settings.

Navigate to the menu Customers -> Select a customer and click the CRM Sales tab.



Under Sales by Year, note that the data displayed, and explanation are for current year and future confirmed campaigns only.

Uncheck the flag in Group Security and save the settings.



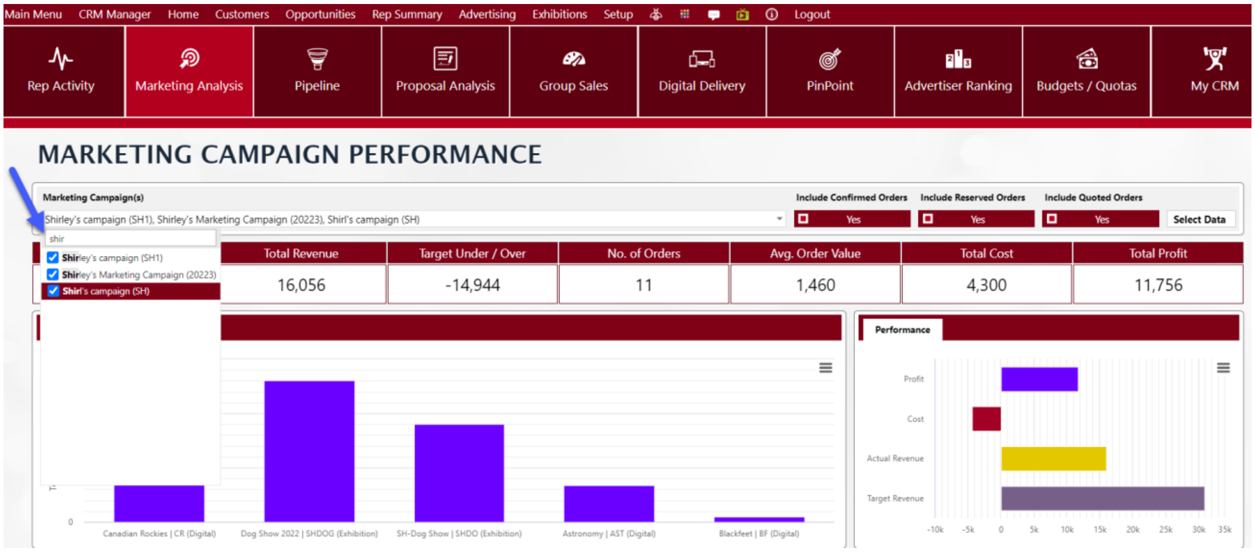
Note that the data now displays Confirmed orders only, except for the current year, which includes future non-confirmed orders.

CRM Module

Marketing Analysis Filter

Filter to search on marketing campaigns by partial or full name on the Marketing Analysis menu.

In CRM, click the menu tile Marketing Analysis.



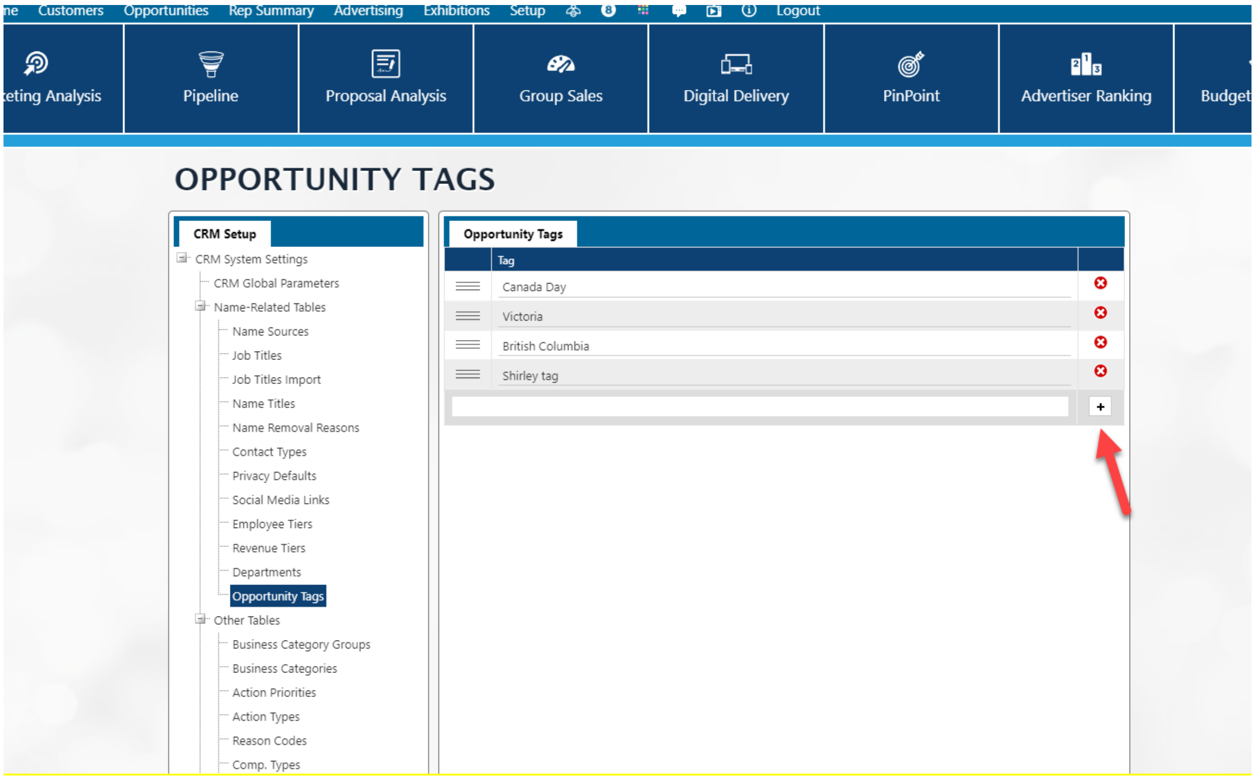
In the bar "Marketing Campaign", type partial text of the campaign name and check the box(es) of the campaigns you wish to see. Select Data.

The campaign names are listed, and the results display for these campaigns.

Opportunity Tags

CRM Settings contain a new node "Opportunity Tags" where users can enter values for the tags and add one or more to Opportunities. Then users can search on the Opportunities Taskboard using the tag(s) and quickly access these opportunities.

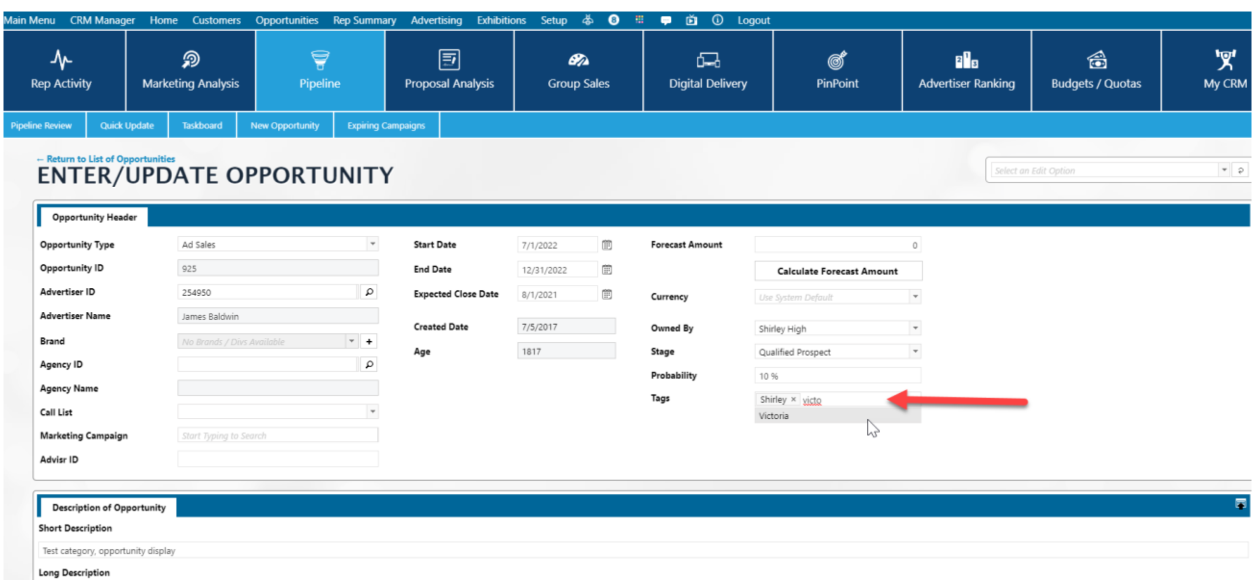
Navigate to the menu Setup -> CRM System Settings -> Opportunity Tags.



Add the tag text and click the + sign to add the tag. Save using the save button.

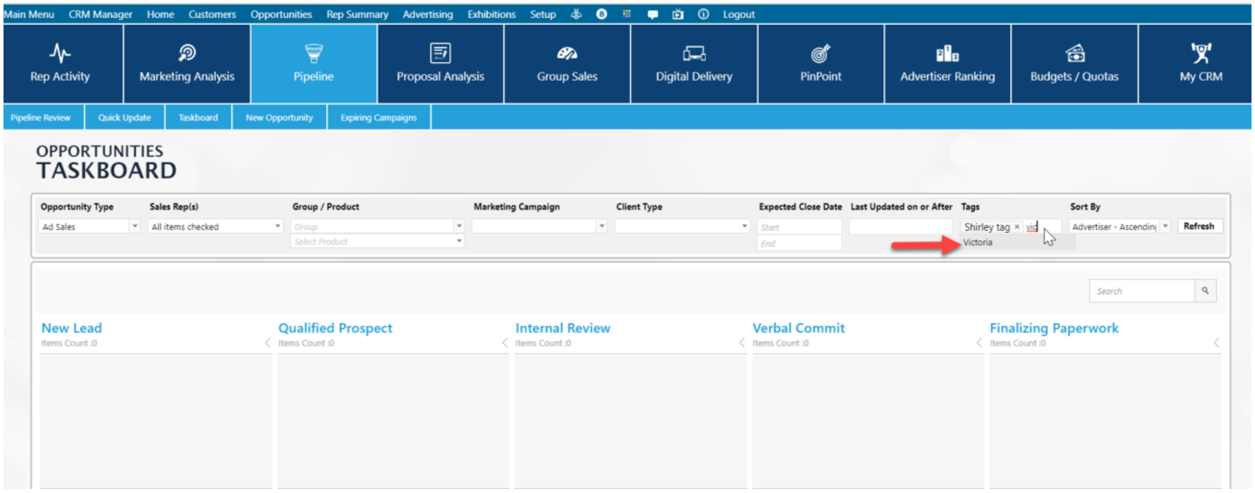
Navigate to edit or create a new opportunity and add one or more tags.

Enter on or more tags.



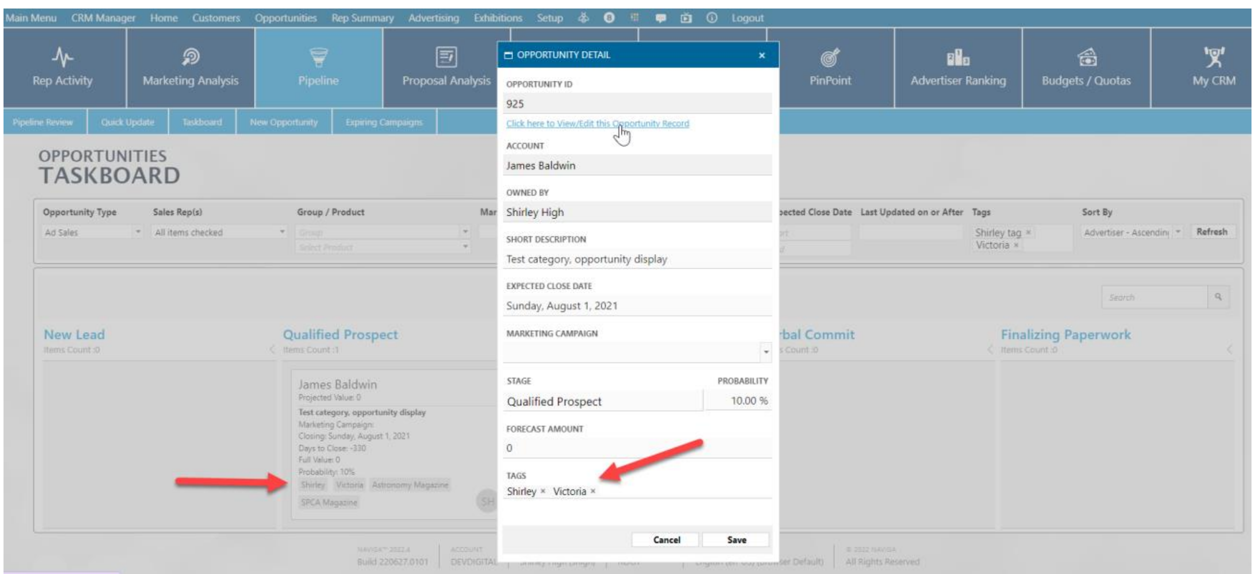
As you start typing the tag, the values from the tags table display and you can choose from them one or more at a time. Save the opportunity.

Navigate to the menu Pipeline. Start typing the tags in the tags field.



As you start typing, the available tags display and you can choose them one after the other and click Refresh.

The results display and note the tags display.



Click the opportunity and note the tags display which you can edit in this screen.

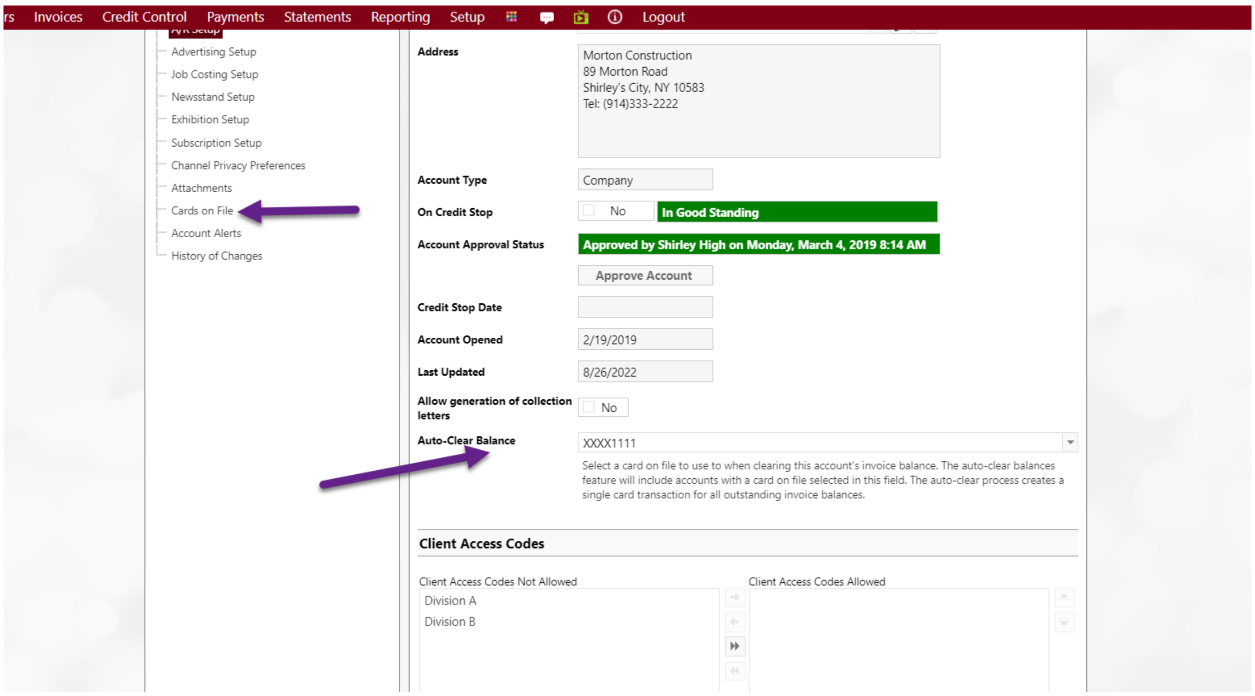
You can also click the hyperlink "Click here to View/Edit this Opportunity Record" which allows you to edit the opportunity in full.

Accounts Receivable

Auto-Clear Balances

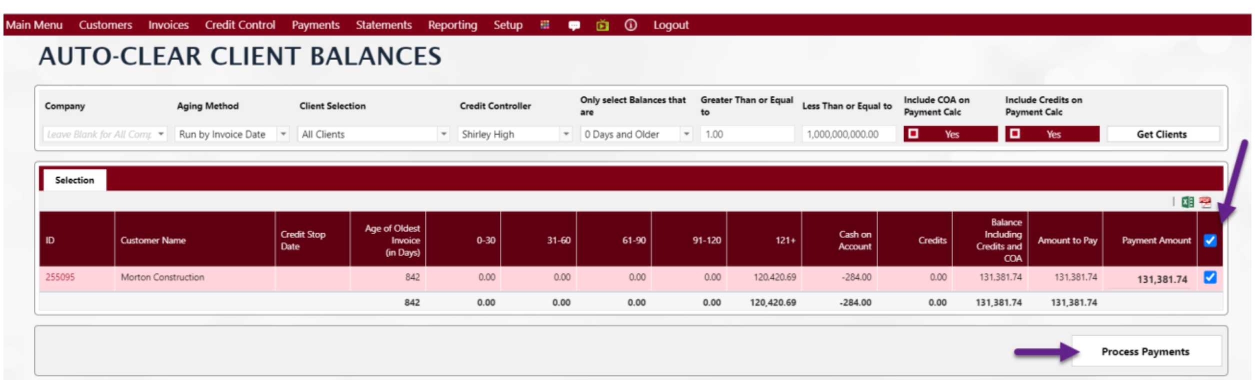
Feature designed to run pre-statement process which selects all open invoices for a customer, selects a credit card on file that has been designated as the balance pay off card. This allows user to charge total outstanding balance in one transaction prior to sending out statements. It also provides a report that indicates any declines.

Navigate to the menu Customers -> Name Address Maintenance and choose a client in the drop-down menu. Click the AR node on the tree.



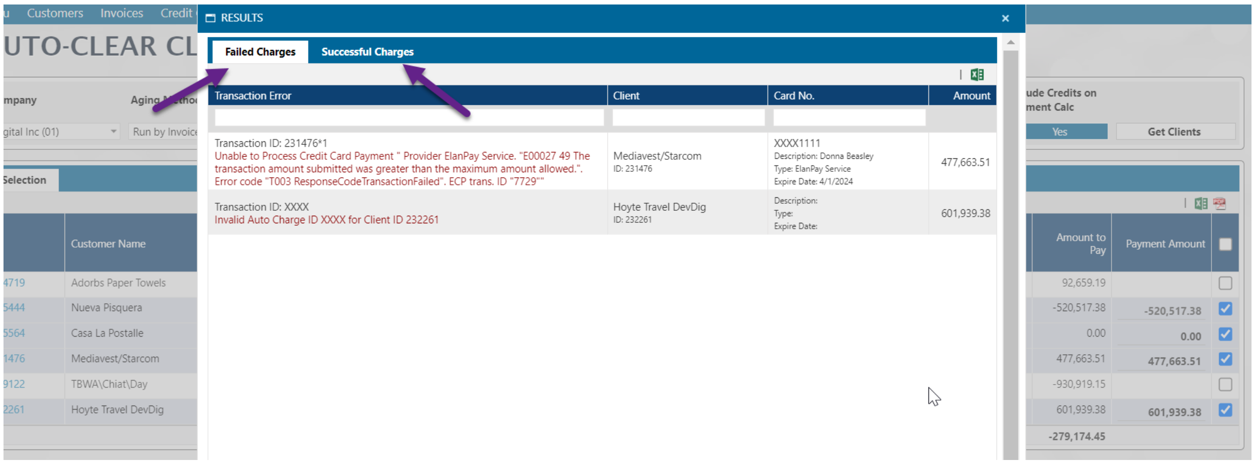
Choose in the drop-down of the field "Auto-Clear Balance" a credit card on file. If none is present, enter one in the node "Cards on File" on this screen. Save the settings.

Navigate to the menu Statements -> Auto-Clear Client Balances.



Run the query to search by aging method, credit controller and age of balances. You can also use the credit controller on the account, amounts fields and include COA or not. Click “Get Clients”. These are the clients who have unpaid invoices organized by age bucket.

Check the box(es) for the ones you’d like to process and click “Process Payments”.



The screen lists any errors causing this transaction to fail, so that you can correct it. The screen also displays a tab to show successful transactions giving you a report of the transactions which went through.