

User Guide 2022.4



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User Guide 2022.4

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."

The screenshot displays the Naviga software interface. At the top is a navigation bar with icons for Home, Sales Activity, Product/Group Analysis, Product Analysis, Publication Analysis, Campaign Budget Analysis, Digital Delivery, PinPoint, Advertiser Ranking, and Commissions. Below this is a section titled 'ORDERS BY PRODUCT'. Within this section, there are fields for 'Product Group' (set to 'Astronomy Magazine (WP)'), 'Order Sales Rep', 'Starting On' (1/1/2022), and 'Ending On' (3/31/2022). A 'Get Data' button is also present. Below these fields is a 'Report Template' section with buttons for 'Apply', 'Edit', 'New', and 'Link'. A blue arrow points to the 'New' button. A pop-up window titled 'REPORT TEMPLATE MANAGER' is open, showing fields for 'Template Name' (Shirley Basic Report by rep), 'Template ID' (NEW), 'Report Name' (Orders by Product), 'Report ID' (ORDERS_BY_PRODUCT), 'Template Owner' (Shirley High), and 'Template Group' (Top of the Tree). There are also sections for 'Use Permissions', 'Edit Permissions', and 'Delete Permissions'.

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.

Group Security

- Security Group Setup
- Users in Group
- General / Company Security
- Name Security
- A/R Security
- A/P Security
- G/L Security
- Production Workflow
- Advertising Security**
 - Status Codes
 - Reports
 - Client Approval Requirements
 - Discounting & Campaign Approvals
 - Campaign Header Security
 - Campaign Line Item Security
 - Campaign Billing Security
 - Naviga Inventory
 - Google Ad Manager Inventory
 - Other Settings
- Exhibition Security
- Product Security
- CRM Security
- Broadcast Campaigns

29 SET PAY LATER OPTION TO FALSE BY DEFAULT WHEN ENTERING A NEW CREDIT CARD PAYMENT IN THE INVOICES & PAYMENTS SCREEN ON A CAMPAIGN.
☒ Yes

30 ALLOW AUTO-PAYMENT OPTION ON CAMPAIGN HEADER
☒ Yes

31 ALLOW REP COMMISSIONS GREATER THAN 100%
☒ Yes

32 REQUIRE CAMPAIGN DESCRIPTION
☐ No

33 ALLOWED TO IGNORE/OVERRIDE PREPAYMENT REQUIREMENTS
☒ Yes
Set this option to YES will allow users in this group to Confirm campaigns without prepayment, where otherwise prepayment would be required.

Campaign Line Items

CAMPAIGN LINE ITEM SETTINGS TOP

1 REQUIRE RATE CARD SELECTION FOR PRICING
☐ No

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.

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint Advertiser Ranking

CHANGE CAMPAIGN STATUS

Current Status: Proposal

New Status: **Confirmed**

CAMPAIGN STATUS MESSAGES

Type	Message
Warning	Prepayment is required

Cancel Change Status

View Credit Status

Default Discount %: 0.00

Auto Payment Method

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.

The screenshot displays the 'My Orders Quick Entry' interface. On the left, a table lists campaigns with columns: Entry Date, Product, Campaign, Campaign Status, Advertiser, and Line ID. A blue arrow points to the 'Line ID' column header, and another blue arrow points to the 'Line ID' value '19129' in the first row. The right pane shows the details for the selected campaign (Line ID 19129), including a 'Material Preview' section with a 'Jobs' header and a 'Material Stats' table.

Entry Date	Product	Campaign	Campaign Status	Advertiser	Line ID
6/9/2022	Astronomy	8051	Q1	Super Tutor	19129
6/9/2022	SPCA Magazine	8057	Q1	Minnesota Twins	19130
6/9/2022	SPCA Magazine	8057	Q1	Minnesota Twins	19131
6/9/2022	Canadian Rockies	8059	Q1	Coptic Church	19147
6/9/2022	Canadian Rockies	8059	Q1	Coptic Church	19147

Material Stats Table:

WIDTH	HEIGHT	METRIC TYPE
1	---	Words
4	---	Characters
---	1	Text Lines
---	18.92	Agile Lines
2.80	1.32	inches
\$0.60	\$3.60	Millimeters
\$1.08	\$3.36	Centimeters
144.00	86.25	Points
192.00	127.01	Pixels

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.

CHANGE CAMPAIGN STATUS

Current Status: Quote 1- Early Pipeline (26%) | New Status: Confirmed-Ready to Bill

CAMPAIGN STATUS MESSAGES

Type	Message
Notification	This customer has Authorized Pre-Payment and has one or more Cards on File.
Warning	Prepayment is required

CASH ON ACCOUNT

Pre-Payment Required: ☒ Yes | Balance Due: 893.55

ID	Date	Amount
☐ 255342*2021851	8/5/2021	1,196.90
☐ 255342*2394.AUTO	8/5/2021	120.00
☒ 255342*805	1/27/2022	100.00
☐ 255342*20225121	5/12/2022	45.30

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.

CHANGE CAMPAIGN STATUS

CAMPAIGN STATUS MESSAGES

Type	Message
Notification	This customer has Authorized Pre-Payment and has one or more Cards on File.
Warning	Prepayment is required

CASH ON ACCOUNT

Pre-Payment Required: ☒ Yes | Balance Due: 899.00

ID	Date	Amount
☐ 255342*2021851	8/5/2021	1,196.90
☐ 255342*2394.AUTO	8/5/2021	120.00
☒ 255342*20225121	5/12/2022	45.30

Error Message: This client requires Prepayment to confirm an order and/or the selected Prepayment Amount is less than the balance due on this campaign. OK

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.

The screenshot shows the 'Campaign Setup' interface. On the left is a sidebar with navigation options like 'Campaign Setup', 'Line Items', 'Material Management', etc. The main area is divided into sections: 'Brand' (BLUE), 'Agency', 'Status' (Confirmed-Ready to Bill), 'Incentives Status', 'Advertiser Proposal ID', and 'Advertiser Budget'. Below these are 'Gross Amount' (2,948.00), 'Commission Amount' (0.00), 'Net Amount' (2,948.00), 'Estimated Tax' (157.50), 'Estimated Total' (3,105.50), and 'Currency' (Local Currency). The 'Line Details' section shows a table with columns: ID, Product, Description, Copy, Ad Type, Start Date, End Date, Aug 2022, and Total. Two lines are listed: 26883 (Astronomy Magazine, 1/8 Page, NR, 8/1/2022-8/29/2022, 1,898.00) and 26884 (Astronomy Magazine, Per Word, LCW, 8/1/2022-8/22/2022, 1,050.00). The total for both lines is 2,948.00.

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.

The screenshot shows the 'Affidavit Processing' interface. At the top is a navigation bar with 'Main Menu', 'Ad Home', 'Customers', 'Campaigns', 'Production', 'Billing', 'Analysis', 'Setup', and 'Logout'. Below this is a sub-navigation bar with 'Home', 'Sales Activity', 'Product/Group Analysis', 'Product Analysis', 'Publication Analysis', 'Campaign Budget Analysis', 'Digital Delivery', 'PinPoint', 'Advertiser Ranking', and 'Commissions'. The main area shows a table of affidavits. The table has columns: Campaign ID, Line ID, Advertiser ID, Advertiser, Brand Name, Description, Size, Category Tree, Category, Issues, Affidavits, First Issue Date, Last Issue Date, and a checkbox. Two rows are shown: 10287 (Astronomy Magazine, 1/8 Page, NR, 8/1/2022-8/29/2022, 1,898.00) and 10287 (Astronomy Magazine, Per Word, LCW, 8/1/2022-8/22/2022, 1,050.00). The table is filtered by 'Running Between' dates of 1/1/2022 to 12/31/2022. A blue arrow points to the checkbox in the first row, and a purple arrow points to the checkbox in the second row.

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.

The screenshot displays the 'GENERATE AFFIDAVITS' application window. On the left, a sidebar contains 'Affidavit Processing' and 'Affidavits' sections. The main area is titled 'Affidavit Selection' and includes filters for 'Report by', 'Product Group', 'Category Tree', 'Date Selection Type', 'Start Date Range', 'End Date Range', and 'Include Previously Generated'. A 'Get Data' button is present. Below these filters is a table of 'Selected Orders' with columns: Campaign ID, Line ID, Advertiser ID, Advertiser, Brand Name, and a checkbox. A red arrow points to the 'Advertiser' column. A modal dialog titled 'GENERATE AFFIDAVITS' is open, showing 'Date to Print on selected Affidavits' as 6/13/2022 and an 'Override Form' dropdown menu with 'Affidavit with Mail-to First Page (175)' selected. The dialog has 'Cancel' and 'Generate Affidavit Batch' buttons. In the background, a table of generated affidavits is visible with columns: Category, Issues, Affidavits, First Issue Date, and Last Issue Date. The table contains three rows of data.

Category	Issues	Adfidavits	First Issue Date	Last Issue Date
D*AUTO	Issue Count: 1 Material ID: 8521	Total Affidavits to Generate: 3 Sean Mina: Copies 3	6/1/2022	6/1/2022
	Issue Count: 2 First Issue Date: Monday, August 1	Total Affidavits to Generate: 3 Dionlav	8/1/2022	8/29/2022

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.

BILL-TO ID	BILL-TO NAME	TAKE PREPAYMENT	FIRST RUN DATE	TOTAL AMOUNT DUE
255073	Super Tutor	☒ Yes	Friday, July 1, 2022	1,048.95

Product Summary	First Run Date	Last Run Date	Total Days Running	Total Price	Tax Amount	Total with Tax
Astronomy AST	7/1/2022 FRIDAY	7/1/2022 FRIDAY	1	999,000	49,950	1,048,950
			1	999,000	49,950	1,048,950

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

BILL-TO ID	BILL-TO NAME	TAKE PREPAYMENT	FIRST RUN DATE	TOTAL AMOUNT DUE
255073	Super Tutor	☐ No	Friday, July 1, 2022	1,548.95

Product Summary	First Run Date	Last Run Date	Total Days Running	Total Price	Tax Amount	Total with Tax
Astronomy AST	7/1/2022 FRIDAY	7/1/2022 FRIDAY	1	999,000	49,950	1,048,950
Blackfeet BF	7/1/2022 FRIDAY	7/15/2022 FRIDAY	1	500,000	0,000	500,000
			2	1,499,000	49,950	1,548,950

CONFIRM

The total amount for this booking has changed from 1048.95 to 1548.95.
This is a difference of 500.00.
Are you sure you want to continue?

OK Cancel

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.

LINE SETTINGS

Line ID: 1420

Ad Type: Cost Per Column-Inch

Line Description: Cost per Column Display

Sort: 1

Size:

Color: Full color

Section: Display

Position: Display Position

Flat Rate: ☐

Rate: 100.00000

Default Quantity: 420.000

Columns: 1.00

Inches: 3.00

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.

NEW COST PER COLUMN-INCH LINE

Line Details

Product: SPCA Magazine

Ad Type: Cost Per Column-Inch

Contract:

Edition(s):

Ratecard: SPCA DISP

Ratecard Line ID: 1420

Description: Cost per Column Display

Columns: 2.00

Inches: 3.00

Size:

G/L Type: Print Display

Color: Full color

Section: Display

Position: Display Position

Target Demographic:

Pricing per Issue

Ratecard Rate: 100.00000

Rate Adjustments: 0.00000

Discount Rate: 100.00000

Quantity: 6.00

Rate per Insertion: 600.00000

Rate x Qty Adjustments: 0.00000

Price per Insertion: 600.00

Total for all Issues

Billing Total Amt: 600.00

Estimated Tax: 0.00

Estimated Total: 600.00

The Rate Per Insertion = Ratecard Rate x Quantity

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

LINE SETTINGS

Line Settings

Day of Week Rate Overrides

Special Date Rate Overrides

Discount Escalation

Rate Escalation

Line ID

1420

Ad Type

Cost Per Column-Inch

Rate

100.00000

Line Description

Cost per Column Display

G/L Type

Print Display

Default Quantity

Sort

1

G/L Project

Lines

420.000

Size

Default Production Status

Columns

Color

Full color

Production Link

Inches

3.00

Section

Display

External ID

Allow Description Override

☐ No

No Tax

☐ No

Position

Display Position

Minimum Depth

Only Allow this Rate on Packages

☐ No

Maximum Depth

Unit of Measure

Inches

Cancel at Full Value

☐ No

Use Columns Count in Calculation

☐ No

Set this Option to YES if you want to charge the full original amount even if a confirmed FLEXIBLE order is stopped early.

Flat Rate

☒ Yes

Is Inactive

☐ No

This will use the Rate as the final price, instead of the

Advertiser Ranking

Commissions

Another ratecard

Sort by Description

Item 1 to 4 of 4

Rate	Inactive	No Tax	
100.00000	No	No	View Line Change History
100.00000	No	Yes	View Line Change History
555.00000	No	No	View Line Change History
450.00000	No	No	View Line Change History

Item 1 to 4 of 4

Save the line and the Ratecard settings.

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

NEW COST PER COLUMN-INCH LINE

Line Details

Creatives / Materials

Production Notes

Other Options

User Defined Fields

Category MetaData

Rep Assignments

Affidavits

Product

SPCA Magazine

Size

Pricing per Issue

Ratecard Rate

100.00000

Ad Type

Cost Per Column-Inch

G/L Type

Print Display

Rate Adjustments

0.00000

Contract

Color

Full color

Discount Rate

100.00000

Edition(s)

Section

Display

Quantity

6.00

Ratecard

SPCA DISP

Position

Display Position

Rate per Insertion

100.00000

Ratecard Line ID

1420

Target Demographic

Rate x Qty Adjustments

0.00000

Description

Cost per Column Display

Columns

2.00

Inches

3.00

Price per Insertion

100.00

Total for all Issues

Billing Total Amt

100.00

Estimated Tax

0.00

Estimated Total

100.00

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
Friday	1 July 2022	☒	100.00						☐	☒

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.

The screenshot shows the 'Product Selection' section of the 'Product Group Settings' interface. The interface is divided into two main columns: 'PRODUCTS NOT IN THIS GROUP' on the left and 'PRODUCT IN THIS GROUP' on the right. The left column contains a list of products, including '8.0 TESTING (8.0T)', '83 testing digital produc (83TD)', '85 Test Show (85)', 'A Show 2009 (AA09)', 'Adcellerant AdMix (ADM)', 'Adcellerant Audience Extension (AAE)', 'Adcellerant Audience Targeting (AAT)', 'Adcellerant Email (AEM)', 'Adcellerant Proposal Booking (DEMO40)', 'Adcellerant SEM (ASEM)', 'Adcellerant SEO (ASEO)', 'Adcellerant Social (ASO)', 'Adcellerant Specialized (ASPC)', 'Adcellerant Video (AVID)', 'AE DEV/Test Exhibition 2021 (AE2020)', 'AE DEV/Test Exhibition 2022 (AE2022)', 'AE's 2015 Test Exhibition (AE15)', 'African Journal of Midwifery and Women's Health (AAF)', 'Agweb.com (AG)', 'Alternative Health (ALTH)', and 'Amanda's Old Exhibition (AE2015)'. A red callout bubble on the left says 'Alphabetically ordered.' The right column contains a list of products, including 'Wildlife Magazine (WL)', '2022 Dog Show (2020DOGS0)', 'Astronomy Magazine (WP)', 'Blackfeet Nation (BF)', 'Canadian Rockies (CR)', 'Darwin Origin of Species (DRW)', 'Learn To Swim (LTS)', 'Native American Tunes website (NAT)', 'New York Theatre Package (NT)', 'No Section (NOSEC)', 'Science Daily (SD)', 'SH- Baked Goods (BG)', 'SH- Dog Show (SHDOG18)', 'Shirley's copied publication (SH)', 'Shirley's No Sections E-Newsletter (SHI)', 'Shirley's with preset dates (SHD)', 'SH-Run Of Network Holder (RON2)', 'SPCA Magazine (SPCAMAG)', and 'Summer Camps (SC)'. A red callout bubble on the right says 'Ordered according to selection here'.

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.

The screenshot shows the 'QUICK LINE ENTRY' interface. The interface has a top navigation bar with 'QUICK LINE ENTRY' and a search icon. Below the navigation bar, there are two main sections: 'Select a Package' and 'Or Copy from Campaign'. The 'Select a Package' section has a dropdown menu and a button. The 'Or Copy from Campaign' section has a dropdown menu and a button. Below these sections, there is a table with columns: 'Lines', 'Category MetaData', 'Notes', 'Delete', 'Product', 'Ratecard', 'Ratecard Line / Description', 'Section / Position', and 'Start/End'. A red arrow points from the 'Select a Product' dropdown to the 'Product' column. The 'Product' column shows a list of products, including 'Wildlife Magazine', 'Astronomy Magazine', 'Blackfeet Nation', 'Canadian Rockies', 'Darwin Origin of Species', 'Learn To Swim', 'Native American Tunes website', 'New York Theatre Package', 'No Section', 'Science Daily', 'SH- Baked Goods', 'Shirley's copied publication', and 'Shirley's No Sections E-Newsletter'.

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 screenshot displays the 'CAMPAIGN LINES' interface with the 'BOOKING WIZARD' tab active. The wizard has several tabs: 'Product Selection', 'Category MetaData', 'Create Material', 'Adjustments', 'Price Breakdown', and 'Book & Pay'. The 'Price Breakdown' tab is selected, showing a table of line items. A warning dialog box is overlaid on the table, indicating a duplicate issue date.

WARNING

WARNING: Duplicate Issue Date(s) have been selected:

- The Star Daily Newspapers: 9/1/2022
- The Star Daily Newspapers: 9/2/2022
- The Star Daily Newspapers: 9/3/2022

OK

Product	Issue / Run Dates	Price Type	Qty	Ratecard Rate	Total Adjustments	Discount Rate
The Star Website 1 DEMO1	9/1/2022 - 9/30/2022 THURSDAY - FRIDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/1/2022 THURSDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/2/2022 FRIDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/3/2022		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10			0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10			0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10			0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10			0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/9/2022 FRIDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/10/2022 SATURDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/11/2022 SUNDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/12/2022 MONDAY		0.000	0.000	0.000	0.000
The Star Daily Newspapers DEMO10	9/13/2022 TUESDAY		0.000	0.000	0.000	0.000

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.

BOOKING WIZARD

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

Start Date
Thursday, September 1, 2022

Print Rate Line
1 Page (913)

Select Product(s)
3 items checked

Digital Rate Line

Group Section

Group Position

Affidavits Delete All Lines

Product	Issue / Run Dates	Delete
Alaska AK	9/2/2022 Multi-Select	
Astronomy AST	9/3/2022 Multi-Select	
SPCA Magazine SPCA	9/1/2022 Multi-Select	

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

BOOKING WIZARD

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

ID	Description	Notes	Preview URL	Edit
3947	testing material management			

Attach Existing Material **Create New Material**

Click the Next to the Price Breakdown tab.

Customers		BOOKING WIZARD							
Sales Activity		Product Selection Category MetaData Material Adjustments Price Breakdown Book & Pay						Advertiser Ranking	
IGN LI		Default Pricing Contract Discount Percent 0.000 % of Net Price It all							
		Product	Issue / Run Dates	Assigned Material	Price Type	Qty	Ratecard Rate	Total Adjustments	Discount Rate
		Alaska AK	9/2/2022 FRIDAY	3947	Flat Fee	1.000	999.000	0.000	999.000
		Astronomy ART	9/3/2022 SATURDAY	3947	Flat Fee	1.000	999.000	0.000	999.000
		SPCA Magazine SPCA	9/1/2022 THURSDAY	3947	Flat Fee	1.000	999.000	0.000	999.000
		ID Description						0.000	2,997.000
		3947 testing material management							

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.

Main Menu	Ad Home	Customers	Campaigns	Production	Billing	Analysis	Setup	Logout
Home	Sales Activity	Product/Group An...	Product Analysis	Publication Analysis	Campaign Budget ...	Digital Delivery	PinPoint	Advertiser Ranking

EDITING CAMPAIGN 10451

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

Campaign Setup

Other Information

Campaign ID 10451

Campaign Billing Type Performance Campaign

Campaign Description

Advertiser ID

Advertiser Name

Advertiser Address

Brand

Agency / Bill-to

Billing Contact

Billing Address

Start Date 7/3/2022

End Date 7/31/2022

Run until cancel No

Name ID	Client ID	Name	City	State/Region	Postal Code	Country
220779	220779	UNIVERSITY OF MINNESOTA	SAINT PAUL	MN	55108	US
255342	255342	Adelson Painting	MINNEAPOLIS	MN	55442	US
255488	255488	St. George Church	MINNEAPOLIS	MN	55442	US
228262	228262	MACYS INC				
244529	244529	Arts Society	PLEASANTVILLE	NY	10570	US
254950	254950	James Baldwin	Pleasantville	NY	10590	US
258089	258089	Patty's Pub	PHILADELPHIA	PA	19106	US
258215	258215	Import 333	Plymouth	MN	55442	US
258214	258214	Import 334	Plymouth	MN	55442	US
258213	258213	Import 333	Plymouth	MN	55442	US
255341	255341	Burlington Textiles Corp of America	Burlington	NC	27215	US
258182	258182	Multi Currency Brands	IOWA CITY	IA	52240	US

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”.

Home Customers Campaigns

CHANGE ADVERTISER: CAMPAIGN ID 10942

SALES ACTIVITY

NG CAMPAIGN

Explorer

Setup

ns

Management

/ Delivery

gn Budget

gn Production Forms

erving Analysis

illing

ined Fields

Comments

: Allocation

on Contacts

st Contacts

e Proposal / Confirmation

ents

& Payments

nmissions

ATTENTION: THERE ARE RESTRICTION
 This screen allows you to change the Advertiser / Brand on a Campaign.
 Changes are not allowed if the Campaign has been billed or a Pre-Payment has been applied. Changing the Advertiser / Brand will not recalculate rates. Nor will it change Sales Rep or Agency assignments. Nor will it reassign Material ownership. If you have interfaces to 3rd party applications then you should consider the implications of changing the Advertiser may have on these applications.

Advertiser ID
 220779

Advertiser Name
 UNIVERSITY OF MINNESOTA

Brand
 Tours

Agency

ERROR(S) AND WARNING(S)

Type	Message
Warning	A client-specific rate is in use
Warning	A client-specific contract is in use
Warning	This order has lines that have been sent to GAM
Warning	The new advertiser requires pre-payment
Warning	The new brand has a different agency

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.

MATERIAL ADD/UPDATE

Material Header

Material ID
10212
Refresh Search New

Date Received
Thursday, August 25, 2022

Expires On

Material Type
Material for Print Delivery

Proof Date

Material Desc.
test

External ID

Advertiser ID
255478

Pickup from ID (or Copied from ID)

Advertiser Name
Copt Yogurt

<https://dev.navigahub.com/>
Refresh Preview Image

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

CHANGE ADVERTISER: CAMPAIGN ID 10942

Advertiser ID: 254950

Advertiser Name: James Baldwin

Brand: A1

Agency:

ERROR(S) AND WARNING(S)

Type	Message
Exception	Pre-payment has been applied
Warning	The new advertiser requires pre-payment

Cancel Save

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.

BULK UPDATE CAMPAIGN STATUS

Product Group from Campaign Shirley's Nature Groups (Please do not change settings) (SHNNA)
 Sales Rep High, Shirley
 Status Codes Reserved 2 - more likely (R2)
 Campaigns Running on or After 1/1/2022
 Campaigns Running on or Before 12/31/2022
 [Get Data](#)

Campaigns **Configure Output**

ON SCREEN COLUMNS		EXCEL EXPORT COLUMNS	
Reset Configuration	Save Configuration	Reset Configuration	Save Configuration
Available Grid Columns Agency Tax Amount Total with Tax Current Status ID Has Card on File Has Journal Entries Has Inventory Problems Customer has not been Approved Campaign has not been Approved Has lines that start in the past Production Contact is Required Credit Limit Exceeded	Selected Grid Columns ID Description Advertiser ID Advertiser Brand Prepayment is Required Start Date End Date Rep Currency Net Amount Current Status	Available Export Columns Tax Amount Total with Tax Current Status ID Has Card on File Has Journal Entries Has Inventory Problems Customer has not been Approved Campaign has not been Approved Has lines that start in the past Prepayment is Required Production Contact is Required Credit Limit Exceeded	Selected Export Columns ID Description Advertiser ID Advertiser Brand Agency Start Date End Date Rep Currency Net Amount Current Status

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”.

BULK UPDATE CAMPAIGN STATUS

Product Group from Campaign Shirley's Nature Groups (Please do not change settings) (SHNNA)
 Sales Rep High, Shirley
 Status Codes Reserved 2 - more likely (R2)
 Campaigns Running on or After 1/1/2022
 Campaigns Running on or Before 12/31/2022
 [Get Data](#)

Campaigns **Configure Output**

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

[Bulk Change Status](#)

ID	Description	Advertiser ID	Advertiser	Brand	Prepayment is Required	Start Date	End Date	Rep	Currency	Net Amount	Current Status	Credit Controller	Client Balance	Campaign Balance	New Status
7538		255488	St. George Church	St. George Church	☐	12/14/2021	4/1/2022	Shirley High		1,149.05	Reserved 2 - more likely	Shirley High	-19,273.40	1,149.05	
10450		255488	St. George Church	Retreats	☐	7/3/2022	7/31/2022	Shirley High		1,213.15	Reserved 2 - more likely	Shirley High	-19,273.40	1,213.15	
10505		255342	Adelson Painting	BLUE	☐	7/30/2022	8/31/2022	Shirley High		500.00	Reserved 2 - more likely		26,158.37	500.00	
10507		254950	James Baldwin	A1	☒	8/1/2022	8/21/2022	Shirley High		425.00	Reserved 2 - more likely			425.00	
10511		254950	James Baldwin	A1	☒	8/1/2022	8/31/2022	Shirley High		416.50	Reserved 2 - more likely			416.50	
10512		255342	Adelson Painting	BLUE	☐	8/1/2022	8/15/2022	Shirley High		999.00	Reserved 2 - more likely		26,158.37	999.00	

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

Click the expansion arrow on one of the records.

n Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout															
Home Sales Activity Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint Advertiser Ranking Commissions															
Campaigns Configure Output															
Bulk Change Status															
Drag a column header and drop it here to group by that column															
ID	Description	Advertiser ID	Advertiser	Brand	Prepayment is Required	Start Date	End Date	Rep	Currency	Net Amount	Current Status	Credit Controller	Client Balance	Campaign Balance	New Status
7538		255488	St. George Church	St. George Church	☐	12/14/2021	4/1/2022	Shirley High		1,149.05	Reserved 2 - more likely	Shirley High	-19,273.40	1,149.05	
Type		Message													
Notification		This customer has Authorized Pre-Payment and has one or more Cards on File.													
10450		255488	St. George Church	Retreats	☐	7/3/2022	7/31/2022	Shirley High		1,213.15	Reserved 2 - more likely	Shirley High	-19,273.40	1,213.15	
10505		255342	Adelson Painting	BLUE	☐	7/30/2022	8/31/2022	Shirley High		500.00	Reserved 2 - more likely		26,158.37	500.00	
10507		254950	James Baldwin	A1	☒	8/1/2022	8/21/2022	Shirley High		425.00	Reserved 2 - more likely			425.00	
Type		Message													
Exception		Prepayment is required													
Exception		Pre-payment required and insufficient cash on account to pre-pay this order													
10511		254950	James Baldwin	A1	☒	8/1/2022	8/31/2022	Shirley High		416.50	Reserved 2 - more likely			416.50	
10512		255342	Adelson	BLUE	☐	8/1/2022	8/15/2022	Shirley		999.00	Reserved 2 - more likely		26,158.37	999.00	

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.

n Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout															
Home Sales Activity Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint Advertiser Ranking Co															
Group Security - Security Group Setup - Users in Group - General / Company Security - Name Security - A/R Security - A/P Security - G/L Security - Production Workflow Advertising Security - Status Codes - Reports - Client Approval Requirements - Discounting & Campaign Approvals - Campaign Header Security - Campaign Line Item Security - Campaign Billing Security - Naviga Inventory - Google Ad Manager Inventory - Other Settings - Exhibition Security															
8 ALLOWED TO ENTER ORDERS IN CLOSED ISSUES ☒ Yes Print issue setup requires an issue close date and time. Users without this permission will not be able to enter orders after close date/time.															
9 REQUIRE AUDIENCE SELECTION ON DATE-BASED PRODUCT LINES ☐ No For e-newsletters one may wish to select an audience. This can be used to default in CPM and to control the number of emails subscribers receive. This setting makes audience selection mandatory.															
10 DO NOT ALLOW SECTION AND POSITION CHANGES IF THEY ARE SET FROM A RATECARD SELECTION ☒ Yes Sections and/or positions can be set on ratecard lines. Depending on this security users may not be able to change the position and section tied to a particular size/price.															
11 DISPLAY WARNING MESSAGE WHEN ENTERING DUPLICATE ISSUE DATE IN FULL LINE ENTRY ☒ Yes															
12 ALLOW REMOVAL OF AUTO ADJUSTMENTS - EVEN IF THE RULE IS TO DISALLOW REMOVAL ☒ Yes If set to NO the ability to remove Auto Adjustments is determined based on the rule set on the Auto Adjustment in Product Setup.															
13 DISABLE DISCOUNT PERCENT ON QUICK LINE ENTRY ☒ Yes This will disable the Discount Percent field at the top of the grid in Quick Line Entry. If a discount is defaulted into this field it will still be used, but the user will not be able to change it.															
14 LOCK RATECARD AND EXTENDED RATE TEXTBOXES IN QUICK LINE ENTRY ☐ No															

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.

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	1 August 2022		500.00		1				☐	

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”.

More Information

Bill-to ID 255243  

Save the advertiser maintenance settings by using the save button.

Main Menu
Ad Home
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Logout

Home
Sales Activity
Product/Group An...
Product Analysis
Publication Analysis
Campaign Budget ...
Digital Delivery
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Advertiser R...

Campaign Explorer

Campaign
Campaign Setup
Line Items
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Production Contacts
Tearsheet Contacts
Generate Proposal / Confirmation
Attachments
Invoices & Payments
Rep Commissions
History of Changes

Campaign Setup

Other Information

Campaign ID

New Campaign

Cancel New

Campaign Billing Type

Performance Campaign

Campaign Description

Bill to is different than advertiser

Advertiser ID

256404

Advertiser Name

Minnesota Diocese of Copts

Advertiser Address

Minnesota Diocese of Copts
89 Minnesota Drive
MINNEAPOLIS, MN 55442
Tel: (763)545-3333

Brand

Retreats

Agency / Bill-to

Minnesota Twins

View Credit Status

Billing Contact

Bishop Youssef

Billing Address

Minnesota Diocese of Copts
89 Minnesota Drive
MINNEAPOLIS, MN 55442
Tel: (763)545-3333

Start Date

End Date

Run until cancel

No

Gross Amount

0.00

Commission Amount

0.00

Net Amount

0.00

Estimated Tax

0.00

Estimated Total

0.00

Currency

Use System Default

Default Discount %

0.00

Auto Payment Method

Select Auto Payment Method

Default Contract

Payment Terms (Default)

2% 10 DAYS

Status

Proposal

Manage Cards on File

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”.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group An... Product Analysis Publication Analysis Campaign Budget ...

PRODUCT DETAIL

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

Product Settings **G/L Defaults** **Campaign Parameters** **Order UDFs**

Default Production Controller Shirley High

Enter Sections Mandatory

Enter Positions Mandatory

Positions by Section Positions are Defined within each Section

Enter Sizes

Split New Lines ☐ No

Mandatory Ratecard ☐ No

When Attaching First Material ☐ Link to any Issue(s) that do not have material

Clear Material Associations on Renewal or Campaign Copy ☐ No

Auto Create Material ☐ No

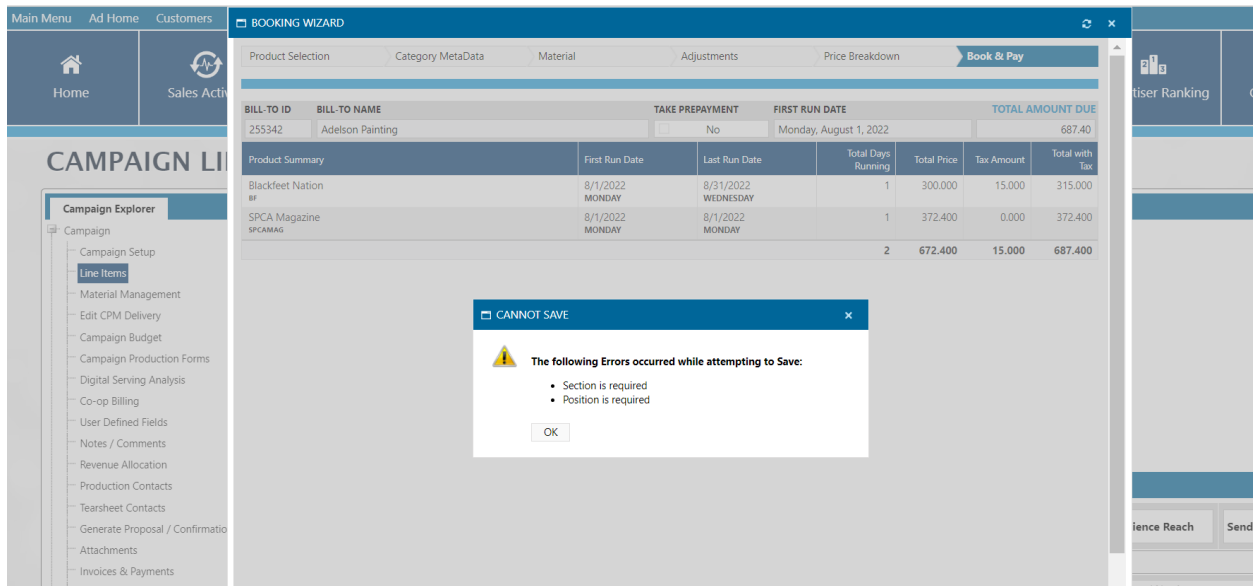
Must use Quick Line Entry for this Product ☐ No

Quick Starting Campaigns / Line Items

If a new campaign or line item is set to start within the defined number of days, alert the following person(s) via email.

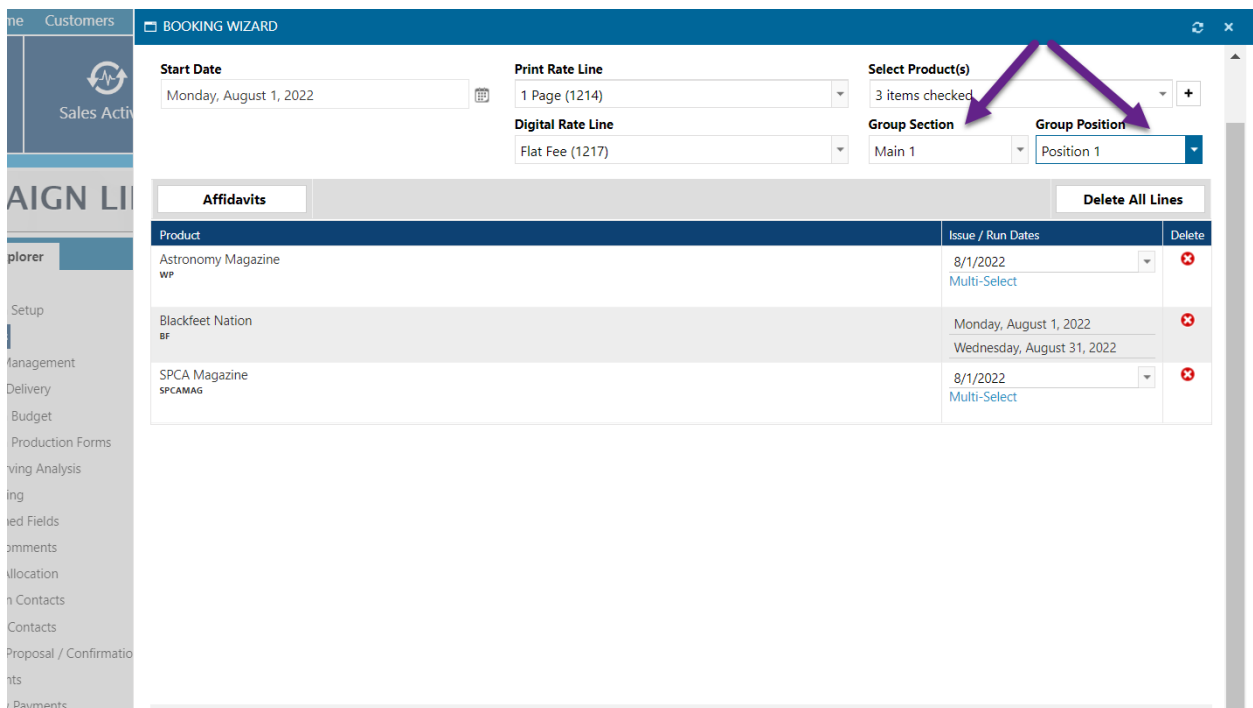
Mark the section and/ or position fields to be Mandatory. Save the settings.

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.

Sort	ID	Description	Completed	Clear Artist Assignment	Suppress Emails	Hidden from Artist's InDesign Queue	Line Color	
1	NOTSTARTED	Artwork Assigned - Not Started	☐	☐	☐	☐	Green	✕
2	INPROCESS	Artwork in Process	☐	☐	☐	☐	Yellow	✕
3	FEEDBACK	Artwork Awaiting Feedback/Info	☐	☐	☐	☐	Cyan	✕
4	DONE	Completed	☒	☐	☐	☐	Magenta	✕
5	NOARTST	Doesn't need artist assignment anymore	☒	☒	☐	☒	Purple	✕
CODE Enter a New Stage Description			☐	☐	☐	☐	Grey	+

Cancel Save

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.

Material Approval

MATERIAL APPROVAL
These settings are used for Material Approval/Rejection via the portal

- HIDE MATERIALS PENDING APPROVAL**
☐ No
- STATUS ON APPROVAL**
Approved
- STATUS ON REJECTION**
Rejected by Customer
- MATERIAL REJECTED ARTWORK STAGE**
Doesn't need artist assignment anymore (NOARTST)

Disable Navigation

DISABLE NAVIGATION
This allows you to disable major areas of navigation in the portal and replace their content with a message

DISABLE SPECIALS

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.

mpaigns Production Billing Analysis Setup Logout

Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint A

Subscription Setup
Channel Privacy Preferences
Attachments
Cards on File
Account Alerts
History of Changes

Account Type: Company

On Credit Stop: ☐ No **In Good Standing**

Account Approval Status: **Approved by Shirley High on Thursday, January 13, 2022 11:53**

Approve Account

Credit Stop Date:

Account Opened: 1/13/2022

Last Updated: 8/4/2022

Allow generation of collection letters: ☒ Yes

Auto-Clear Balance: XXXX-XXXX-XXXX-1455

Select a card on file to use when clearing this account's invoice balance. The auto-clear balances feature will include accounts with a card on file selected in this field. The auto-clear process creates a single card transaction for all outstanding invoice balances.

Client Access Codes

Client Access Codes Not Allowed

Client Access Codes Allowed

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint Advertiser Ranking Commissions

Prepare Next Billing
Generate Invoice(s)
Print Invoice(s)
Generate Order Data File
Download Order Data Files
Regenerate Invoice(s)
Reverse Campaign Invoicing
Campaigns with Problems
Billing Schedule Issues
Credit Issues
Missing Actuals
Credit Card Issues
Campaigns Awaiting Credits

Product Group: *Leave Blank for ALL*

Ad Type: *Leave Blank for ALL*

Date to Appear on Invoice: 8/4/2022

Financial Period to Post to: 2022-08

Comment to Print on Invoice(s):

Documents to Generate: Generate Both Invoices and Credits

Invoice Sort Order: Sort by Advertiser Name

Suppress Zero Value Invoices: ☐ No

BATCH WORKFILE(S) CREATED

BATCH(ES) PENDING GENERATION

Batch ID	Batch Delivery Type	Invoice Count	Net Amount
IN2089T	Email & Print	4	4,551.00
		4	4,551.00

Close / Reset Page Go to List of Batches

Generate Invoices

NAVIGATOR 2022-A Build 220804.0137 ACCOUNT DIGITAL20224 YOU ARE LOGGED IN AS Shirley High (shigh) SECURITY GROUP ROOT LANGUAGE English (en-US) (Browser Default) © 2022 NAVIGA All Rights Reserved

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

[Main Menu](#)
[Customers](#)
[Invoices](#)
[Credit Control](#)
[Payments](#)
[Reporting](#)
[Setup](#)
[Logout](#)

AUTO-CLEAR CLIENT BALANCES

Company: LIVEDAT
 Aging Method: Run by Invoice Date
 Client Selection: All Clients
 Credit Controller: Shirley High
 Only select Balances that are: 0 Days and Older
 Greater Than or Equal to: 1.00
 Less Than or Equal to: 1,000,000,000.00
 Include COA on Balance Calculation: Yes
[Get Clients](#)

ID	Customer Name	Balance	0-30	31-60	61-90	91-120	121+	Cash on Account	Age of Oldest Invoice (in Days)	Credit Stop Date	
231917	JAKE'S BAIT & TACKLE	5,200	0	0	0	0	5,200	0	2,011		☐
244247	Levi Strauss & Co	328,837	0	0	0	53	328,785	0	646		☐
232198	MARKS IMPORT TESTING	904	0	0	0	0	904	0	3,123		☐
256368	Alaska Fishing	2,050	0	0	0	2,050	0	0	97		☐
256378	Baseball Recruiting	806	0	0	806	0	0	0	83		☐
244425	James Garner Inc	32,013	0	0	0	0	32,013	0	3,328		☐
244502	Johnson Materials	30,000	0	0	0	0	30,000	0	3,200		☐
244518	London Hampers	16,800	0	0	0	0	16,800	0	2,803		☐

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.

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TICKET TEAMS

[Ticket Setup Tables](#)

- Campaign Tickets Setup
 - Ticket Teams**
 - Master Ticket Status Codes
 - Ticket Status Code Groups
 - Ticket Types
 - Ticket Priorities
 - Ticket Workflow Routing

Ticket Team

Team ID: SH [New](#)

Team Name: Shirley Operational Team

Team Members

ID	Name	
CSTRAYED	Cheryl Strayed	☐
SK	Scott Kersey	☐
		☐

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

NEW TICKET FOR CAMPAIGN 8196

Ticket Type: Operational Ticket Type | **Priority**: Critical | **Status**: Open | **Assigned Team**: Shirley Operational Team | **Assigned User**: [Dropdown]

Short Description: test email | **Team Owner**: [Dropdown] | **User Owner**: Shirley High

Long Description: test email

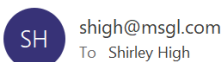
Notes | **Regarding Line Items** | **(Other) Line Items** | **History of Changes** | **Attachments**

ID	Product	Description
19497	Alaska Size: 1/2 Page (4 x 5.5) Color: Full Color (4C)	1/2 Page

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



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.

Main Menu

Ad Home

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Home

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TICKETS DASHBOARD

Ticket Type

Assigned to User

Assigned to Team

Owner User

Owner Team

Entered By

Priority

Master Status

Include Closed

Closed from

Closed to

All items checked

Shirley Operator

Shirley High

No

Select Data

New

Open

Under Review by Manager

More Information Needed

On Hold

Sent back for correction

cache

test new

0

6

1

0

0

0

0

0

Selected Tickets

Configure Output

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

Ticket ID	Campaign ID	Type	Short Description	Status ID	Status	Master Status ID	Master Status Name	Priority	Assigned To	Assigned to team ID	Assigned to Team Name	Owner User ID	Owner User Name	Owner Team ID	Owner Team Name	Created by User	Created Date/Time	Last Updated by	Last Updated
21	7964	Operational Ticket Type	testin	1	Open	OPEN	Open	Critical	SH	Shirley Operational Team	SHIGH	Shirley High			Shirley High	Friday, April 29, 2022 2:43:42 PM	Shirley High	Friday, April 29, 2022 3:08:25 PM	
27	8196	Operational Ticket Type	test email	1	Open	OPEN	Open	Critical	SH	Shirley Operational Team	SHIGH	Shirley High			Shirley High	Monday, August 1, 2022 3:08:25 PM	Shirley High	Monday, August 1, 2022 3:08:25 PM	
18	7956	Production Ticket Type	Production	3	In Progress	REVIEW	Under Review by Manager	Medium	SH	Shirley Operational Team					Shirley High	Thursday, April 28, 2022 7:31:52 AM	Shirley High	Thursday, April 28, 2022 8:50:42 AM	
28	8196	Operational Ticket Type	test	1	Open	OPEN	Open	Critical	Shirley High	SH	Shirley Operational Team	SHIGH	Shirley High		Shirley High	Monday, August 1, 2022 3:11:27 PM	Shirley High	Monday, August 1, 2022 3:11:27 PM	

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.

None								
Preflighted XML File								
None								
Preflight History								
Preflight Status	Date/Time							
-- No Records --								
Edition Splits								
Comments								
Orders Using this Material								
Assign to Other Future Lines								
ID	Publication	Issue	Issue Date	Brand	Size	Prod. St.	Order St.	Position
-- No Records --								
								Cancel Save Changes

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.

Main Menu Ad Home Customers Camp									
ASSIGN MATERIAL TO FUTURE LINES									
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	☒
Assign									

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

Material Handling									
Edition Splits									
Comments									
Orders Using this Material									
Assign to Other Future Lines									
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		
							Cancel	Save Changes	

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

EDITING FLAT FEE LINE: 25567

Contract		Color		Adjustments	-109.84000
Edition(s)		Section	Display	Adjusted Flat Fee	282.16000
Ratecard	Print 2022	Position	Display Position	Total for all Issues	
Ratecard Line ID	1214	Target Demographic		Total Amount	4,796.72
Description	1 Page			Estimated Tax	0.00
Lines / Page Eq.	420 / 1.000			Estimated Total	4,796.72

Line Details										
Proportion Values		Day/Date Rates								
Day	Issue Date	Available	Billing Amount	Material	Production Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Thursday	4 August 2022	☒	282.16						☐	☒
Friday	5 August 2022	☒	282.16						☐	☒
Friday	26 August 2022	☒	282.16	Material ID: 8263					☐	☒
Monday	29 August 2022	☒	282.16	Material ID: 8263					☐	☒
Tuesday	30 August 2022	☒	282.16						☐	☒
Wednesday	31 August 2022	☒	282.16						☐	☒
Thursday	1 September 2022	☒	282.16						☐	☒
Friday	2 September 2022	☒	282.16						☐	☒
Monday	5 September 2022	☒	282.16						☐	☒
			4,796.72							

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.

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[Product/Group Analy...](#)
[Product Analysis](#)
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[Campaign Budget An...](#)
[Digital Delivery](#)
[PinPoint](#)

Show Due Date ☐ No

Delivery Method Email

Actuals Reconciliation Use Estimates

Cap Actuals ☒ Yes

Override Invoice & Statement Form Settings

Performance Invoice Form Select an Invoice Form

Flexible Invoice Form Select an Invoice Form

Statement Form Select a Statement Form

Forms Logo

Billing Contact (Appears on Invoice)

Billing Contact Type Use a Contact in the System

Billing Contact

ID	Name	Title
-- No Records --		

Email Invoices to These Contacts

Company	Name	Title	Phone	Email
-- No Records --				

Lake Townhomes Select a Contact New Contact

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.

The screenshot shows a software interface with a top navigation bar containing links like 'me', 'Customers', 'Campaigns', 'Production', 'Billing', 'Analysis', 'Setup', and 'Logout'. Below this is a sub-navigation bar with tabs such as 'Sales Activity', 'Product/Group Analy...', 'Product Analysis', 'Publication Analysis', 'Campaign Budget An...', 'Digital Delivery', 'PinPoint', and 'Advertiser Ra'. The main content area displays a form titled 'Override Invoice & Statement Form Settings'. The form includes several sections: 'Billing Group' with a dropdown, 'Tax Code' with a dropdown set to 'NO TAX', 'Terms' with a dropdown set to 'NET 30 DAYS', 'Digital Agency %' with a text input set to '0.00', 'Show Due Date' with a checkbox set to 'No', 'Delivery Method' with a dropdown set to 'Email', 'Actuals Reconciliation' with a dropdown set to 'Use Estimates', and 'Cap Actuals' with a checkbox set to 'Yes'. Below these is a section for 'Override Invoice & Statement Form Settings' with dropdowns for 'Performance Invoice Form', 'Flexible Invoice Form', and 'Statement Form', and a 'Forms Logo' field. The 'Billing Contact (Appears on Invoice)' section includes a 'Billing Contact Type' dropdown set to 'Use a Contact in the System' and a 'Billing Contact' field with a dropdown, edit, and add icon. At the bottom is a section 'Email Invoices to These Contacts' with a table with columns: Company, Name, Title, Phone, Email, and two empty columns. An error message box is overlaid on the form, stating: 'ERROR Please resolve the following error(s): • Emailed invoices cannot be sent to contacts without a valid email address'. The error box has an 'OK' button.

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group An... Product Analysis Publication Analysis Campaign Budget ... Digital Delivery PinPoint Advertiser Ranking Commissions

Sales CRM Ad Production Accounting Exhibition Sales Newsstand Sales Account Quick Search

Overview MediaRadar Other Rep Access

Account ID 255243 Account Status **In Good Standing**

Account Type Customer Credit Limit 0.00

Parent Account Account Balance -10,079.00

Website Card(s) on File No

Telephone Fax

Source(s) Account Approval Status **Approved by Shirley High on Tuesday.**

Map Addresses My Contacts

Selected Address [266114] 87 Twins Road N. View Larger Map

View larger map

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

NOTE: Numbers shown are for Confirmed orders only, including the current year, which includes future confirmed orders

Year	Pages	Print Sales	Digital Sales	Total Sales
2023	0.000	0	0	0
2022	24,544	89,856	3,452	93,308
2021	4,500	6,396	100,268	106,664
2020	2,000	3,900	0	3,900
2019	0.000	0	0	0
2018	0.000	0	0	0
2017	0.000	0	0	0
	31,044	100,151	103,720	203,871

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group An... Product Analysis Publication Analysis Campaign Budget ... Digital Delivery PinPoint Advertiser Ranking Commissions

Sales CRM Ad Production Accounting Exhibition Sales Newsstand Sales Account Quick Search

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Telephone Fax

Source(s) Account Approval Status **Approved by Shirley**

Map Addresses My Contacts

Selected Address [266114] 87 Twins Road N. View Larger Map

View larger map

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	Pages	Print Sales	Digital Sales	Total Sales
2023	0.000	0	152	152
2022	41,574	204,397	3,647	208,044
2021	4,500	6,396	100,268	106,664
2020	2,000	3,900	0	3,900
2019	0.000	0	0	0
2018	0.000	0	0	0
2017	0.000	0	0	0

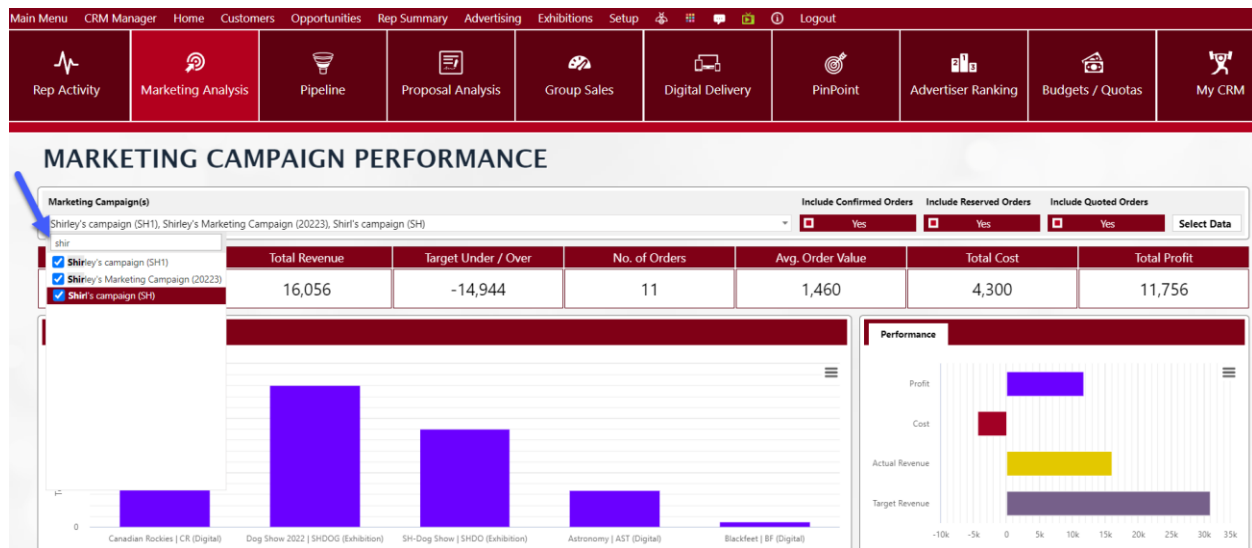
Note that the data now displays Confirmed orders only, except for the current year, which includes future non-confirmed orders.

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.

Marketing Analysis Pipeline Proposal Analysis Group Sales Digital Delivery PinPoint Advertiser Ranking Budget

OPPORTUNITY TAGS

CRM Setup

- CRM System Settings
 - CRM Global Parameters
- Name-Related Tables
 - Name Sources
 - Job Titles
 - Job Titles Import
 - Name Titles
 - Name Removal Reasons
 - Contact Types
 - Privacy Defaults
 - Social Media Links
 - Employee Tiers
 - Revenue Tiers
 - Departments
 - Opportunity Tags**
- Other Tables
 - Business Category Groups
 - Business Categories
 - Action Priorities
 - Action Types
 - Reason Codes
 - Comp. Types

Opportunity Tags

Tag	
Canada Day	✖
Victoria	✖
British Columbia	✖
Shirley tag	✖
	+



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.

Main Menu CRM Manager Home Customers Opportunities Rep Summary Advertising Exhibitions Setup Logout

Rep Activity Marketing Analysis Pipeline Proposal Analysis Group Sales Digital Delivery PinPoint Advertiser Ranking Budgets / Quotas My CRM

Pipeline Review Quick Update Taskboard New Opportunity Existing Campaigns

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

ENTER/UPDATE OPPORTUNITY

Opportunity Header

Opportunity Type	Ad Sales	Start Date	7/1/2022	Forecast Amount	0
Opportunity ID	925	End Date	12/31/2022	Calculate Forecast Amount	
Advertiser ID	254950	Expected Close Date	8/1/2021	Currency	Use System Default
Advertiser Name	James Baldwin	Created Date	7/5/2017	Owned By	Shirley High
Brand	No Brands / Dies Available	Age	1817	Stage	Qualified Prospect
Agency ID				Probability	10 %
Agency Name				Tags	Shirley ✖ vict ✖ Victoria
Call List					
Marketing Campaign	Start Typing to Search				
Adviser ID					

Description of Opportunity

Short Description

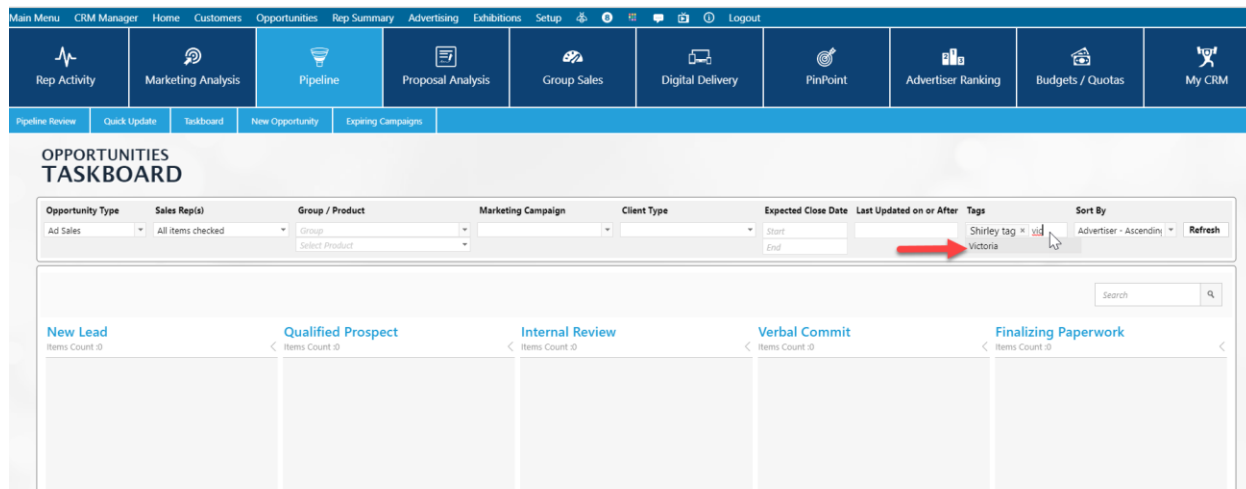
Test category, opportunity display

Long Description



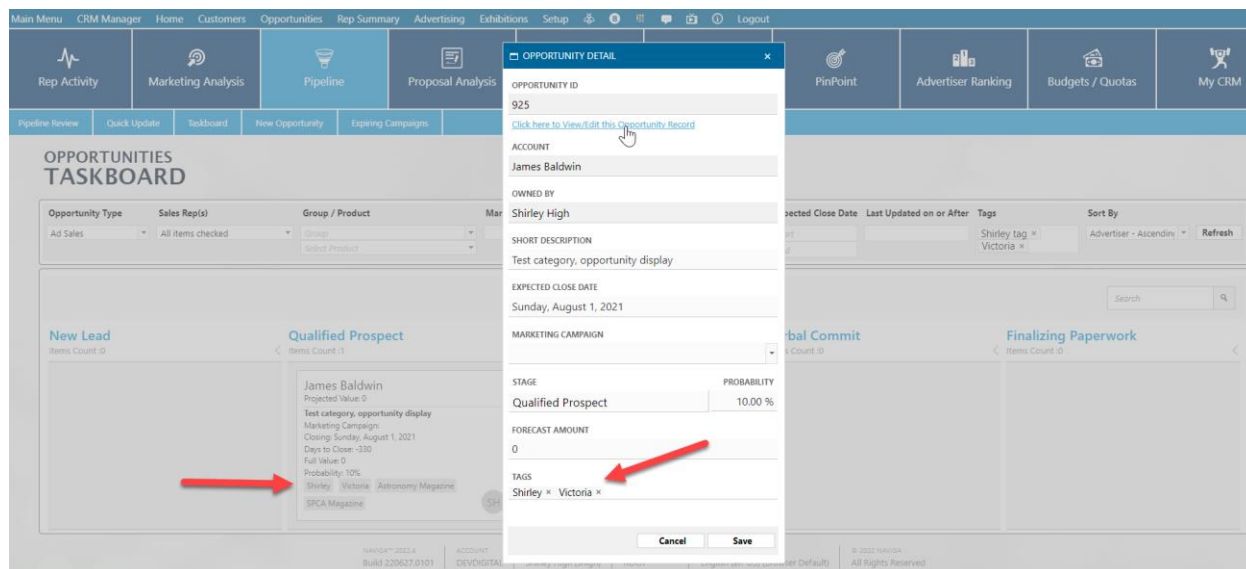
As you start typing the tag, the values from the tags table display and you can choose from them one or more at a time. Save the opportunity.

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.

The screenshot shows the 'Name Address Maintenance' screen for a client named Morton Construction. The left sidebar contains a tree view with 'Cards on File' highlighted by a purple arrow. The main form displays client information and account settings. The 'Auto-Clear Balance' field is highlighted with a purple arrow. Below the form is a section for 'Client Access Codes'.

Client Access Codes Not Allowed	Client Access Codes Allowed
Division A	
Division B	

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.

The screenshot shows the 'AUTO-CLEAR CLIENT BALANCES' screen. It features a header with various filters and a table of client balances. The 'Process Payments' button is highlighted with a purple arrow.

ID	Customer Name	Credit Stop Date	Age of Oldest Invoice (in Days)	0-30	31-60	61-90	91-120	121+	Cash on Account	Credits	Balance Including Credits and COA	Amount to Pay	Payment Amount	
255095	Morton Construction		842	0.00	0.00	0.00	0.00	120,420.69	-284.00	0.00	131,381.74	131,381.74	131,381.74	☒
			842	0.00	0.00	0.00	0.00	120,420.69	-284.00	0.00	131,381.74	131,381.74		

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 screenshot shows a software interface with a 'RESULTS' window. The 'Failed Charges' tab is selected, displaying a table with the following data:

Transaction Error	Client	Card No.	Amount
Transaction ID: 231476*1 Unable to Process Credit Card Payment " Provider ElanPay Service: "E00027 49 The transaction amount submitted was greater than the maximum amount allowed". Error code "T003 ResponseCodeTransactionFailed". ECP trans. ID "7723"	Mediavest/Starcom ID: 231476	XXXX1111 Description: Donna Beasley Type: ElanPay Service Expire Date: 4/1/2024	477,663.51
Transaction ID: XXXX Invalid Auto Charge ID XXXX for Client ID 232261	Hoyte Travel DevDig ID: 232261	Description: Type: Expire Date:	601,939.38

On the right side of the interface, there is a summary table:

Amount to Pay	Payment Amount	
92,659.19		☐
-520,517.38	-520,517.38	☒
0.00	0.00	☒
477,663.51	477,663.51	☒
-930,919.15		☐
601,939.38	601,939.38	☒
-279,174.45		

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.

RESULTS							
Failed Charges				Successful Charges			
Transaction ID	Client ID	Client Name	Card Type	Card Description	Card No.	Expire Date	Amount
244719*12	244719	Adorbs Paper Towels	ElanPay Service	Adorbs Paper Towels John Doe	XXXX1111	12/1/2022	112.50