

Release Guide

This document provides instructions for how to use the new features in the 2023.6 release, grouped by module. Remember to install & test in your test system before Production.



These are the most important takeaways / impactful changes that you need to pay attention to:

- If you are upgrading to 23.6 from a version PRIOR TO 23.5, starting with version 2023.5, we are supporting ACH and additional payment options through our NavigaPay gateway. A quick update of the credit card interface may be required depending on the processor. Please submit a support ticket in Salesforce to let us know you are upgrading so we can confirm the settings are updated to prevent any issues with taking credit cards.
 - There were a couple of reports of banks not showing up on the payment screen after upgrading. If this happens to you, try going to Setup → System Tables Setup → Bank Setup and just selecting the bank and resaving it.
- There is a new workflow option for Inserts / Preprints. The older workflow will still be supported, to ease the transition, but we think many of you will want to take advantage of this new workflow. [See below for details](#)
- There are a couple new Group Security Changes in both [Advertising](#) and [CRM](#) modules which you should probably check out and set accordingly.
- When accessing campaign information from Campaign Inquiry or from the A/R side of the system, in previous releases user was taken to an informational campaign screen which was not editable by any user. This screen was outdated and was a relic from the "Classic" Naviga ad system. Going forward, in Digital First systems, these order links will take user to the main campaign entry screen. You may want to visit group security for any user who should not have edit permissions on campaigns to ensure that permissions are set up accordingly so that those users continue to only have read only access. See [below](#) for more details and screenshots.
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In Previous versions, the booking wizard allowed the user to select a package and then manually add additional product lines on the same booking group. That caused some pricing issues, and has been taken away going forward. If a user wishes to book a package AND book additional lines, they will need to do the additional lines separately from the package. It can still be on the same campaign, but must be done in either a separate booking wizard group, or full line entry.

Advertising Module

New workflow option for Inserts/Preprints

In 2023.6 there is a new option for setting up, pricing, and managing preprints, which allows for varying page types with page counts, weights and spoilage. It isn't required that you implement this workflow - if you do not set up the following you will still be able to use preprints the old way, though we do think this way will be appealing to many of you.

Prerequisite Setup

Size Codes

Setup → Advertising Setup → Size Setup. Size Codes are not a new concept for this release, but there is a new field on the size code setup. For any sizes that are to be used in the new Inserts workflow, the flag "For Preprints" should be set to yes. In addition, only dimension types of Inches, Millimeters, Centimeters, or Points should be used on these, since the digital dimensions wouldn't be relevant.

SIZE CODE SETTINGS

Size Code: PP_STANDARD

Dimension Type: Inches

For Print: ☐ Yes

Size Description: Standard Preprint

Width (X-Dimension): 10.0000

For Preprints: ☒ Yes

Line Eq.:

Height (Y-Dimension): 15.0000

Inactive: ☐ No

Sort: 302

Page Types

Navigate to **Setup → Advertising Setup → Page Types**. Setup one or more page types as needed for the types of inserts/preprints that you offer. Page types will set defaults for weight and spoilage %. You may also have certain metadata questions that need to be answered and possibly passed on to the printer to allow them to print the insert properly.

PAGE TYPES FOR PREPRINTS / INSERTS

Page Types

Page Type ID: STD

Page Type Description: Standard Insert

Default Size Code: Standard Preprint (10x15)

External ID: ABC

Is Inactive: ☐ No

Page Count	Default Weight	Default Spoilage Percent	Override External ID
2	1.111	5.00	123
4	2.222	5.00	456
6	3.333	5.00	XYZ
8	4.444	5.00	
10	5.555	5.00	
12	6.666	5.00	

Add 1 New Lines

1. Click New to create a new Page Type

2. Enter a desired ID and Description for the Page Type
3. Optionally, select a default size code. This can also be manually added / changed on an order
4. External ID - Optional - This doesn't have a function inside of Naviga Ad, but may be included on a feed to the printer.
5. Is Inactive - set this flag to yes if you no longer wish to use a Page Type

Page Options - Add as many lines as needed for the given page type. Enter the page count for each line. These will be the valid page counts allowed when booking an order. For each number of pages, set the default weight and default spoilage percent. These two can be overwritten in order entry if a given insert differs from the default. Each line can also have an override External ID, or this can be left blank it is shares the same External ID as the Page Type itself. This is optional and only used in external feeds.

Custom Fields - much like the metadata in classified order entry and custom forms setup elsewhere in the system, the custom fields tab on Page Type setup allows the system admin to set up certain questions that the order entry user can (or must) answer before saving the order.

PAGE TYPES
FOR PREPRINTS / INSERTS

Page Types

Page Type ID:

Page Type Description:

Default Size Code:

External ID:

Is Inactive: ☐ No

Page Options **Custom Fields**

Label/Question	Prompt Type	Validation	Formatting	Required	
Orientation	Dropdown List Selection	☐ Multi-Select ☐ Allow Custom Text Portrait Landscape		☐	✖
Bleed	True/False Prompt			☐	✖
				☐	✖
	Single-Line Text Multi-Line Text Date Date Range Number Number Range Dropdown List Selection True/False Prompt Color Code			☐	✖
				☐	✖

- Enter a Label / Question
- Select the prompt type from the dropdown
- If appropriate for the prompt type, enter validation information (used with single line text, multi-line text, and dropdown list)
- If available, based on the prompt type, select formatting from the dropdown (used on dates, date ranges, number and number ranges)
- check the required flag if the user is required to answer the question before saving the order.

Ad Type (Preprint Types)

Navigate to **Setup → Advertising Setup → Ad Types**. Like Size Codes, Ad Types are not new, but there are some new settings related to the new Inserts workflow.

Click Ad New at the top of the Ad Type screen, or select an existing Ad Type to edit with the pencil icon. Each ad type for the new workflow should include the following:

- Ad Type ID
- Ad Type Description
- G/L Type
- Line Type (not actually relevant to these, since the rate type will be defined elsewhere. Cost per Thousand is the default new line type - can leave it at that if desired)
- Is for Preprints flag - set this to Yes. This is important as it is the trigger to open the new preprint workflow screen rather than Full Line entry.
- Linked Products - Select the products which allow this Ad Type. Only required if you restrict certain ad types to certain products. Can also select ad types during product setup if desired.
- Page Types (Preprints/Inserts) tab - **Optional** - can set allowed Page Types for this Ad Type. If none are selected, all page types will be available in order entry for this Ad Type.

Navigate to Setup → Advertising → Insert Rating Schedules

This inserts workflow does not use the standard rate cards that other kinds of ads use. This uses a rule-based engine that determines which price to use based on how closely it matches one of these definitions. Insert Rating Schedules are used

with [Size Codes](#) flagged as "For Preprints" and [Ad Types](#) flagged as "Is for Preprints"

Click New to create a new schedule and give it an ID and a Description.

**INSERT RATING SCHEDULES
FOR PREPRINTS / INSERTS**

Insert Rating Schedules

1 SCHEDULE ID
[Dropdown menu]
[Reload] [New]

2 SCHEDULE DESCRIPTION
[Text input field]

3 IS INACTIVE
☐ No

After clicking "New" you can click the option to copy from another schedule if there is a similar schedule you wish to copy and edit rather than create the new one from scratch.

**INSERT RATING SCHEDULES
FOR PREPRINTS / INSERTS**

Insert Rating Schedules

1 SCHEDULE ID
NEW
[Reload] [New] [Copy from another Insert Rating Schedule]

2 NEW SCHEDULE ID
[Text input field]

3 SCHEDULE DESCRIPTION
[Text input field]

4 IS INACTIVE
☐ No

There is an inactive flag as well in case you wish to no longer use it at some point in the future.

In the Basic Settings section:

Basic Settings

Basic Settings

1 **PRICE TYPE**
Quantity Based CPM

2 **START DATE**
Sunday, October 1, 2023

3 **VALID THRU DATE**
Tuesday, December 31, 2030

4 **PRIORITY CODE**

- Select the Price Type to be used. Options include Quantity based CPM, Quantity Based, or Flat Rate.
- Optional - Enter a Start Date and Valid through date to limit when this rate can be used.
- Priority Code - The appropriate schedule is chosen by the system based on the number of matching qualifiers. For example, there might be multiple schedules that could potentially be used in order entry. One schedule might match on just one qualifier, and another one might match several qualifiers. In the event that two rate schedules match on the same number of qualifiers, the priority code will determine which schedule to use.

Qualifiers

The screenshot shows a web application interface with a top navigation bar and a main content area. The navigation bar includes links: Main Menu, Ad Home, Customers, Campaigns, Production, Billing, Analysis, Setup, and Logout. Below this is a secondary bar with links: Home, Sales Activity, Product/Group A..., Product Analysis, Publication Analy..., Campaign Budge..., Digital Delivery, PinPoint, Advertiser Ranking, and Commissions.

The main content area is titled 'Qualifiers' and contains 7 numbered sections:

- 1 SPECIFIC ADVERTISER**: A text input field.
- 2 PAGE TYPES**: A dropdown menu.
- 3 PRODUCT GROUP**: A dropdown menu.
- 4 PRODUCT(S)**: A table with columns 'Product ID', 'Product Name', and 'Sections'. Below the table, it says 'No records to display.' and there is an 'Add Product(s)' button.
- 5 CLIENT TYPE**: A dropdown menu.
- 6 AD TYPE(S)**: A section with 'AVAILABLE AD TYPES' and 'SELECTED AD TYPE(S)'. The 'AVAILABLE AD TYPES' section has a search bar and a 'Clear' button. Below the search bar, there are two items: 'Preprint Type 1' and 'Preprint Type 2'. The 'SELECTED AD TYPE(S)' section is empty.
- 7 MATCHING DAY(S) OF WEEK**: A dropdown menu.

There are currently 7 attributes or qualifiers that can be checked to determine which rate schedule to use.

1. **Specific Advertiser** - Select a specific advertiser if the advertiser has negotiated a custom price
2. **Page Types** - Select one or more relevant page types for this rating schedule
3. **Product Group** - If applicable select a product group that this rating schedule is valid for
4. **Product(s)** - Select one or more allowed products for this rating schedule
5. **Client Type** - Select a client type that is allowed to use this rate schedule
6. **Ad Type(s)** - Select one or more ad types that can use this rate schedule (Note these ad types are filtered to only ad types flagged with the "Is for Preprints" flag)
7. **Matching Days of the week** - Select one or more days of the week which can use this rating schedule.

Price Escalations

Price Escalations

Add New Escalation Copy Escalations from Another Schedule Clear all Escalations

Edit Pages up to 2 pages

From Qty	Up To Quantity	Rate
0	500	10.00000
501	1,000	20.00000
1,001	15,000	30.00000
15,001	9,999,999	40.00000

4 pages

From Qty	Up To Quantity	Rate
0	500	40.00000
501	1,000	50.00000
1,001	15,000	60.00000
15,001	9,999,999	70.00000

Cancel Delete Save

For each Rate Schedule, you can have one or more sets of prices that can be used, based on the number of pages (which also links to weight based on Page Type Setup) and number of inserts. These prices will be flat prices, per insert prices, or per thousand prices based on the Price Type selected in the Basic Settings section.

- Select Add New Escalation or click the pencil icon to edit an existing one
- Click the red x in the right column to delete an escalation
- Alternatively, Click copy escalations from another schedule to save some time and copy and edit from a similar schedule.
- Click Clear All Escalations to delete the escalation grid and start over.

ESCALATION RULES

Pages up to 6 Reset Grid

From Qty	Up To Quantity	Rate
0.000	500.000	
501.000	1,000.000	
1,001.000	15,000.000	
15,001.000	9,999,999.000	

Add 1 New Lines +

Cancel Apply

Click Save to save the changes

End User Experience

An end user booking an order with this new workflow will begin on the Line Items tab and select a Product and an Ad Type, as they normally would for a full line entry order. The Ad Type, if it is one that is flagged in setup as being for Preprints, will trigger the new workflow rather than traditional full line entry

The screenshot displays the 'CAMPAIGN LINES' interface. On the left is a 'Campaign Explorer' sidebar with a tree view containing items like 'Campaign Setup', 'Line Items' (highlighted), 'Material Management', 'Campaign Budget', 'Campaign Custom Data Forms', 'Digital Serving Analysis', 'Co-op Billing', 'User Defined Fields', 'Notes / Comments', 'Revenue Allocation', 'Production Contacts', 'Tearsheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', and 'History of Changes'. At the bottom of the sidebar are links for 'Go to CRM View' and 'Go to Advertiser View'.

The main area is titled 'Campaign Lines' and contains two sections. The top section is a form for campaign details:

- Campaign ID:** 14192 (with 'Import' button)
- Advertiser:** Round Guys Brewing Company
- Client Type:** Extra Accounts (EXT)
- Brand:** Round Guys Brewing Company
- Agency:** (empty field)
- Status:** Confirmed-Ready to Bill
- Incentives Status:** (empty field)
- Adcellerant Proposal ID:** (empty field with 'df' icon)
- Adcellerant Budget:** 0.00
- Start Date:** 11/1/2023
- End Date:** 12/31/2023
- Gross Amount:** 3,000.00
- Commission Amount:** 0.00
- Net Amount:** 3,000.00
- Estimated Tax:** 600.00
- Estimated Total:** 3,600.00
- Currency:** Local Currency

The bottom section is titled 'Line Details' and includes tabs for 'Applied Incentives' and 'Tickets'. Below these tabs are three buttons: 'Booking Wizard', 'Quick Line Entry', and 'Full Line Entry' (which is highlighted with a purple box). To the right of these buttons is a 'Send a Confirmation' button. Below the buttons is a dropdown menu showing 'The Star Daily Newspapers' and 'Preprint Type 1'. Below this is an 'Advertising Orders' section with a 'Check Incentives' button, a 'Selected Line(s) Options' dropdown, and a 'Numbers in the Grid' section with a 'Display Estimated Net Amounts' button.

The Insert / Preprint Booking workflow window will open and several tabs can be seen across the top, similar to the Booking Wizard for Classified:

INSERT / PRE-PRINT BOOKING

Product Selection | Zone Selection | Insert Details | Overruns | Adjustments | Price & Book

Product
The Star QA Daily Newspaper (QA1)

Ad Type
Preprint Type 1

Page Type
Standard Insert

Section

Position

First / Primary Issue Date
Sunday, November 19, 2023

Additional (Perpetual) Issue Date(s)

Add Dates **Clear All**

Monday, November 20, 2023
Tuesday, November 21, 2023

Next

Product Selection

Product and Ad Type are filled in based on what was selected in the prior screen, though it can be changed here if desired.

Page Type must be filled in as it is what drives page counts, weights, spoilage, metadata questions and possible the rates on later screens.

Sections and positions are optional, and section could potentially drive rate selection later if setup as such.

First / Primary Issue Date is when the printing and billing will be done, and all pricing will be based on that date.

Additional (perpetual) Issue dates are not going be relevant for all inserts. If it is a flyer for instance where the insert itself changes each week, those would only have a single issue date. If a campaign for flyers needed multiple dates, there can be

multiple lines on a campaign, each with their own issue date. You can also copy the original line and modify the date. The Perpetual Issue dates are used when the printing of the insert is all done up front for the first drop, but then extra copies are saved for future drop dates when the insert will be delivered. The important thing to understand here is that all the printing and billing happens on the first date.

Zone Selection

From there the user clicks "next" to select Zones.

INSERT / PRE-PRINT BOOKING

Product Selection **Zone Selection** Insert Details Overruns Adjustments Price & Book

Total Selected Distribution

0

Use Grid to Select Zones Use Map to Select Zones

Zone Group	Version	HD	SC	Retail
-- No Records --				

Previous Next

Several different methods are available for selecting Zones

- User Selects Zones from Grid
- User imports the desired Zones.
- User Selects Zones from Map

Selecting Zones from the Grid

This will be familiar if you are already booking inserts using Zones in the other workflow. There is a breadcrumb trail at the top to jump up to higher levels once the user begins drilling down. This is a view from the highest level grouping (Philadelphia Metro in my system)

INSERT / PRE-PRINT BOOKING				
ZONE SELECTION				
Top of the Tree > Philadelphia Metro				
Total Selection		15,585	67,985	163,058
Selected Zone		HD	SC	Retail
Outer Suburbs	☒	332,797	1,354,003	163,058
Philly City	☐	392,971	1,606,752	194,898

Import Selections Apply

Based on the blue squares, user can see that some HD routes were selected (HD=Home Delivery in my system, these names are configurable in Zone Dimension Setup), some SC routes were selected, and All of the Retail Outlets were selected in the Zone Group "Outer Suburbs" In the Philly City Group, nothing was selected for this order.

Drilling down into Outer Suburbs additional Zones and/or Zone Groups can be seen

INSERT / PRE-PRINT BOOKING				
ZONE SELECTION				
Top of the Tree > Philadelphia Metro > Outer Suburbs > Montgomery County				
Total Selection	246,628	15,585	67,985	163,058
Selected Zone	HD	SC	Retail	
Skippack	☐ 14,731	☐ 60,012	☒ 6,548	
Norristown	☐ 23,223	☐ 90,439	☒ 11,355	
18041 - East Greenville	☐ 1,302	☐ 5,424	☒ 652	
18054 - Green Lane	☐ 1,027	☐ 4,278	☒ 565	
18073 - Pennsburg	☐ 2,524	☐ 9,350	☒ 1,234	
18074 - Perkiomenville	☐ 1,559	☐ 5,775	☒ 763	
18076 - Red Hill	☐ 639	☐ 2,662	☒ 320	
18964 - Souderton	☒ 3,729	☒ 13,812	☒ 1,823	
18969 - Telford	☒ 3,665	☒ 16,800	☒ 1,833	
19001 - Abington	☒ 412	☒ 1,720	☒ 227	
19002 - Ambler	☒ 7,779	☒ 35,653	☒ 3,890	
19003 - Ardmore	☐ 3,380	☐ 13,770	☒ 1,653	
19004 - Bala Cynwyd	☐ 2,542	☐ 10,357	☒ 1,130	
19006 - Huntingdon Valley	☐ 5,784	☐ 23,565	☒ 2,571	
19012 - Cheltenham	☐ 1,600	☐ 7,337	☒ 801	
19025 - Dresher	☐ 1,457	☐ 5,934	☒ 648	
Import Selections Apply				

Once all selections are made, the user can click apply to save and close the window, or for additional selections in higher groups, user can select desired group in the breadcrumb trail at the top.

After clicking apply, the user returns to the Zone Selection tab and can see the selected Zones, and their counts for each date selected on the Product Selection tab.

Importing Zones

Using the same grid view from above, instead of selecting zones from the boxes as shown from example 1, the user can also import the selections. Select "Import Selections" button at the bottom of the screen

User can copy and paste from excel, text file, or just manually type in Zone ID's. These can be a list, like shown in the screenshot above, or it could be comma separated. I would use the select, to select only certain zone ID's, and select one or more dimensions to select. To use the deselect, I might select an entire Zone group in the previous screen, but then list just a handful of exceptions in this list to exclude only a few from the overall group.

Click Apply to save the selections and only the selected Zones will be displayed

INSERT / PRE-PRINT BOOKING

Pro

ZONE SELECTION

Top of the Tree

Philadelphia Metro

Outer Suburbs

Montgomery County

Total Selection	182,467	32,024	135,184	15,259
Selected Zone	HD	SC	Retail	
Norristown	☐ 23,223	☐ 90,439	☐ 11,355	
18041 - East Greenville	☐ 1,302	☐ 5,424	☐ 652	
18054 - Green Lane	☐ 1,027	☐ 4,278	☐ 565	
18073 - Pennsburg	☐ 2,524	☐ 9,350	☐ 1,234	
18074 - Perkiomenville	☐ 1,559	☐ 5,775	☐ 763	
18076 - Red Hill	☐ 639	☐ 2,662	☐ 320	
18964 - Souderton	☐ 3,729	☐ 13,812	☐ 1,823	
18969 - Telford	☐ 3,665	☐ 16,800	☐ 1,833	
19001 - Abington	☒ 412	☒ 1,720	☒ 227	
19002 - Ambler	☒ 7,779	☒ 35,653	☒ 3,890	
19003 - Ardmore	☒ 3,380	☒ 13,770	☒ 1,653	
19004 - Bala Cynwyd	☒ 2,542	☒ 10,357	☒ 1,130	
19006 - Huntingdon Valley	☐ 5,784	☐ 23,565	☐ 2,571	
19012 - Cheltenham	☒ 1,600	☒ 7,337	☒ 801	
19025 - Dresher	☐ 1,457	☐ 5,934	☐ 648	
19027 - Elkins Park	☐ 472	☐ 2,163	☐ 260	

Import Selections

Apply

Click apply again to return to the Zone Selection tab

Use Map to select Zones

The final option is to select zones from a map with a radius of available zones from the customer's address. On the Zone tab, the user selects the button "Use Map to Select Zones" and a google map will appear

User clicks Use Selected Zones to save selection and return to the Zone Selection screen with the selected Zones displayed.

INSERT / PRE-PRINT BOOKING

Product Selection **Zone Selection** Insert Details Overruns Adjustments Price & Book

Total Selected Distribution
182,467

Use Grid to Select Zones Use Map to Select Zones

Zone Group	Version	HD	SC	Retail
Philadelphia Metro → Outer Suburbs → Bucks County → 18914 - Chalfont → 19 November 2023		5,055	0	0
Philadelphia Metro → Outer Suburbs → Bucks County → 18932 - Line Lexington → 19 November 2023		105	0	0
Philadelphia Metro → Outer Suburbs → Montgomery County → 18964 - Souderton → 19 November 2023		3,729	0	0
Philadelphia Metro → Outer Suburbs → Montgomery County → 19440 - Hatfield → 19 November 2023		441	0	0
Philadelphia Metro → Outer Suburbs → Montgomery County → 19446 - Lansdale → 19 November 2023		0	0	0
Philadelphia Metro → Outer Suburbs → Montgomery County → 19454 - North Wales → 19 November 2023		7,524	0	0
		16,854	0	0

Previous Next

Note the blank Column above in the Zone List. This is the space where a different version number can be added for each Zone. In the example above perhaps Montgomery county zones get version A of the insert and in Bucks County Version B gets delivered.

Click next to proceed to the Inset Details

Insert Details

INSERT / PRE-PRINT BOOKING

Product Selection

Zone Selection

Insert Details

Overruns

Adjustments

Price & Book

Pages

2

Total Weight

1.111

Spoilage Percent

5.00

Total Distribution

16.854

Size Code

Standard Preprint (10x15)

Spoilage Qty

843

Base Print Qty (before Overruns)

17.697

Field	Value	Required
Orientation		☐
Bleed	☐ No	☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐

Previous

Next

- **Pages** - select desired number of pages for the insert. Available numbers here will be based on the Page Type setup
- **Total Weight** - this will default based on the pages selected and the page type setup. Can be overridden by the user
- **Spoilage Percent** - again will default from the Page Type and # of Pages selected, but can be overridden by the user.
- **Total Distribution** - not editable - this is the quantity from the Zone selection on the previous step
- **Size Code** - Default based on the Page Type Setup. Can be overridden by the user to another size code. Only Size Codes flagged as being Insert/Preprint Size codes will be in the dropdown. May be further filtered by Size Codes allowed on the product.
- **Spoilage Qty** - Calculated field equal to the Total Distribution * Default Spoilage % - can be overridden
- **Base Print Qty** - Equal to the Total distribution plus the Spoilage

Optional Metadata fields - if custom fields were configured on the page setup, they will be displayed here, and the user can answer the questions

Click **next** to continue to overruns

Overruns

This optional tab is used if there are any overruns requested on the order. These overruns may or may not be charged to the client, but will affect the total quantity needed from the printer

The screenshot shows the 'INSERT / PRE-PRINT BOOKING' application with the 'Overruns' tab selected. A modal window titled 'OVERRUN' is open, allowing the user to add a new overrun. The modal contains the following fields:

- Description:** Extra Store Copies
- Ad Type:** Liner Cost per Something (dropdown menu)
- Print Quantity:** 500
- Rate:** 3.00000
- Price:** 1,500.00
- Delivery-to Address:** 123 Main St, Lansdale, PA 12345

At the bottom of the modal are 'Cancel' and 'OK' buttons. The background application shows a table with columns: Edit, Ad Type ID, Address, Qty, Rate, Price, and Delete. The table currently displays '-- No Records --'.

There is no rate setup in the background for overruns. The user simply types in the information based on the agreed upon price with the client. Overruns will create additional line items on the order, so Ad Type is important, to properly charge for it and have it map to the correct G/L. the Ad Type drop down will only display CPM, FF, or CPU line types.

A CPU ad type will calculate the Price by multiplying Qty * Rate

A CPM ad type will calculate the Price as Qty * Rate / 1000

A FF Ad type will disregard the Qty in the price calculation and the Price will equal the rate

Click ok and select next to enter adjustments (if applicable)

Adjustments

ID	Description	Type	+/-	Value / Percent	Gross/Net	Qty	Amount	Percent	
						1.00	0.00000		✖
						1.00	0.00000		✖
1	\$25 Surcharge for XYZ	Amount	+	25.00		1.00	0.00000		✖
2	% Adjustment	Percent		0.00					
3	% Adjustment	Amount		0.00					
4	Group % Adjustment	Percent	-	-10.00					
8	Some new Discount	Amount	-	-10.00					
9	Upcharge	Percent	+	10.00					

Add 1 New Line +

Previous Next

Enter one or more adjustment codes as necessary (optional) and click next

The screenshot shows the 'INSERT / PRE-PRINT BOOKING' window with the 'Adjustments' tab selected. The window has a navigation bar with tabs: Product Selection, Zone Selection, Insert Details, Overruns, Adjustments (active), and Price & Book. Below the navigation bar is a table with the following data:

ID	Description	Gross/Net	Qty	Amount	Percent
3	Adjustment		1.00	25.00000	

Price and Book

Most of the fields on this final screen are read only. Only the Billing Quantity can be edited here. There is a "Price it out" button at the top to re-calculate the price. Generally this isn't needed, but is there in case there is a price change that didn't automatically calculate upon opening this screen. There is a "Show Rate Selection" button as well which will display which rate was chosen and why (See [Insert Rating Schedules](#) for info on how we determine what rate to charge).

The screenshot shows the 'INSERT / PRE-PRINT BOOKING' window with the 'Price & Book' tab selected. The window has a navigation bar with tabs: Product Selection, Zone Selection, Insert Details, Overruns, Adjustments, and Price & Book (active). Below the navigation bar are two buttons: "Price it out" and "Show Rate Selection". The main area contains several fields organized into four columns:

Publication	Total Print Quantity	Billing Quantity	Total Overrun(s)
The Star QA Daily Newspaper (QA1)	18,197	18,197	1,500.00
Ad Type (PrePrint Type)	Total Distribution Qty	Quantity Type	Subtotal
Preprint Type 1 (PP1)	16,854	Distribution Quantity, CPM	1,000.84
Page Type	Spoilage Qty	Base Rate	Post-Rate Adjustments
Standard Insert (STD)	843	40,000	0.00
Page Count	Overrun(s) Qty	Rate Adjustments	Total Price
2	500	15,000	2,500.84
Total Weight (in ounces)		Effective Rate	
1.111		55,000	

At the bottom right, there are two buttons: "Previous" and "Finish".

Click Finish to save the order,

One order line will be created for the Primary Issue and any Perpetual Issue dates set on the Product Selection tab (again with all the revenue being tied to that Primary issue date), and one order line will be created for EACH Overrun line.

Post Billing user experience

Once the line has been invoiced, the user experience will differ slightly. The order will still open up in this wizard-like workflow, but the user will see that the order has already been billed and limited information will be editable at this point. Nothing that affects pricing will be editable.

Product Selection Tab - nothing on this page is editable after billing has started. User can click on the link in the red bar at the top to view the associated invoice. (or it is also available on the campaign Invoices and Payments node, as always)

INSERT / PRE-PRINT BOOKING

ATTENTION: Billing has started. [Click here](#) to view the associated Invoice(s).

Product Selection Zone Selection Insert Details Overruns Adjustments Price & Book

Product
The Star QA Daily Newspaper (QA1)

Ad Type
Preprint Type 2

Page Type
Standard Insert

Section

Position

First / Primary Issue Date
Sunday, December 17, 2023

Additional (Perpetual) Issue Date(s)
Add Dates Clear All

Zone Selection Tab - nothing on this page is editable after billing has started.

INSERT / PRE-PRINT BOOKING

ATTENTION: Billing has started. [Click here](#) to view the associated invoice(s).

Product Selection

Zone Selection

Insert Details

Overruns

Adjustments

Price & Book

Total Selected Distribution

334,176

Use Grid to Select Zones

Use Map to Select Zones

Zone Group	Version	HD	SC	Retail
		☐	☐	☐
Philadelphia Metro → Outer Suburbs → Bucks County → 18914 - Chalfont → 17 December 2023		5,055	23,169	2,780
Philadelphia Metro → Outer Suburbs → Bucks County → Levittown → 19054 - Levittown → 17 December 2023		4,185	17,437	0
Philadelphia Metro → Outer Suburbs → Bucks County → Levittown → 19055 - Levittown → 17 December 2023		3,342	13,924	0
Philadelphia Metro → Outer Suburbs → Bucks County → Levittown → 19056 - Levittown → 17 December 2023		4,181	15,486	0
Philadelphia Metro → Outer Suburbs → Bucks County → Levittown → 19057 - Levittown → 17 December 2023		4,642	17,191	0
		21,405	87,207	2,780

Previous

Next

Insert Details Tab - This page allows editing of the weight and the metadata.

INSERT / PRE-PRINT BOOKING

ATTENTION: Billing has started. [Click here](#) to view the associated Invoice(s).

Product Selection

Zone Selection

Insert Details

Overruns

Adjustments

Price & Book

Pages

8

Total Weight

4.444

Spoilage Percent

5.00

Total Distribution

334,176

Size Code

Standard Preprint (10x15)

Spoilage Qty

16.709

Base Print Qty (before Overruns)

350,885

Field	Value	Required
Orientation	Portrait	☐
Bleed	☐ No	☐
		☐
		☐
		☐

Previous

Next

Overruns Tab - on the overruns tab, no new overruns can be added and within an overrun, only the description and delivery address can be edited after billing.

INSERT / PRE-PRINT BOOKING

ATTENTION: Billing has started. [Click here](#) to view the associated Invoice(s).

Product Selection Zone Selection Insert Details **Overruns** Adjustments Price & Book

Add an Overrun

Edit	Ad Type ID	Address	Qty	Rate	Price
	INS	Overrun #1 123 Main St Lansdale PA 19446	5,000	35.00000	175.00

OVERRUN

Description
Overrun #1

Ad Type
Inserts

Print Quantity
5,000

Rate
35.00000

Price
175.00

Delivery-to Address
123 Main St
Lansdale PA 19446

Cancel OK

5,000 35.00000 175.00

Adjustments Tab - Nothing on the adjustments tab can be edited post-billing. If adjustments are needed after billing, Post-Billing adjustment tickets should be the workflow used to request an adjustment.

Price and Book Tab - Nothing on this tab is editable after billing. User can click on the Show Rate Selection button to see what rate was selected (and if there were other possible matching rates that were not selected.)

INSERT / PRE-PRINT BOOKING

ATTENTION: Billing has started. [Click here](#) to view the associated Invoice(s).

Product Selection

Zone Selection

Insert Details

Overruns

Adjustments

Price & Book

Price it out

Show Rate Selection

Publication	Total Print Quantity	Billing Quantity	Total Overrun(s)
The Star QA Daily Newspaper (QA1)	355,885	350,885	175.00
Ad Type (PrePrint Type)	Total Distribution Qty	Quantity Type	Subtotal
Preprint Type 2 (PP2))	334,176	Distribution Quantity, CPM	24,911.95
Page Type	Spoilage Qty	Base Rate	Post-Rate Adjustments
Standard Insert (STD))	16,709	70.000	0.00
Page Count	Overrun(s) Qty	Rate Adjustments	Total Price
8	5,000	0.000	25,086.95
Total Weight (in ounces)		Effective Rate	
4.444		70.000	



Filter for easier GAM GeoTarget searching



There is a new dropdown field in the geotargeting field on campaign entry

GEOGRAPHY

Description	Type	Hierarchy	Delete
-- No Records --			
Bulk Entry	STATE	kans	Include
Description			
Arkansas			
United States -- Arkansas (STATE)			
Kansas			
United States -- Kansas (STATE)			
Items 1-2 out of 2			

Selecting what you are searching on in the dropdown will filter the list to better match what you are looking for and cut out some extra matches

Geography

Description

Type

Hierarchy

-- No Records --

Bulk Entry

kansas

Device Categories

Browsers

Operating Systems

Browser Language

Device Capabilities

Device Manufacturers

Bandwidth

Mobile Carriers

Domain Targeting

Description

Arkansas
United States → Arkansas
[STATE]

Arkansas County
United States → Arkansas → Arkansas County
[COUNTY]

Arkansas City
United States → Kansas → Arkansas City
[CITY]

Arkansas State University
United States → Arkansas → Arkansas State University
[NEIGHBORHOOD]

Kansas
United States → Illinois → Kansas
[CITY]

Kansas
United States → Kansas
[STATE]

Items 1-11 out of 11

Options include filtering on City, State, Province, Country and more

Geography

Description

-- No Records --

Bulk Entry

Device Categories

Browsers

Operating Systems

Browser Language

Device Capabilities

Device Manufacturers

Bandwidth

Mobile Carriers

Domain Targeting

COUNTRY

PROVINCE

CITY

COUNTY

REGION

NEIGHBORHOOD

DEPARTMENT

STATE

AIRPORT

MUNICIPALITY

BOROUGH

GOVERNORATE

CANTON

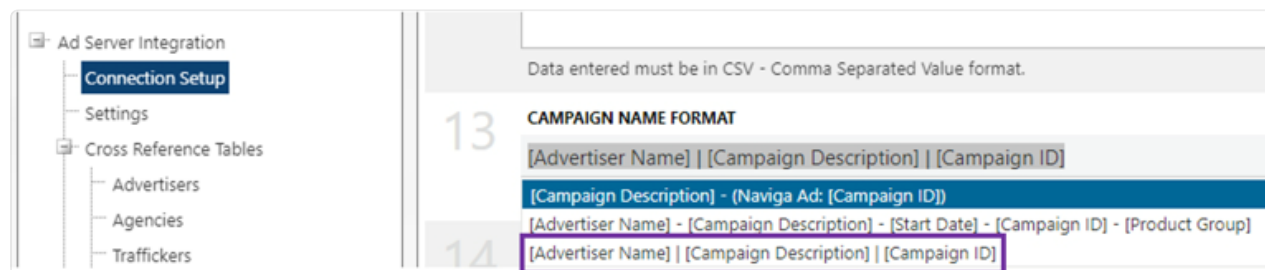
POSTAL_CODE

TERRITORY

PREFECTURE

New GAM Campaign Name Format Option & Prefix

Navigate to **Setup → Admin → Ad Server Integration Setup** and then select the Connection Setup node.



There is a new option in the dropdown for the Campaign name to be the Advertiser Name | Campaign Description | Campaign ID. This can optionally be coupled with a new setting on the Product Group Setup to add a Prefix in front.

Previous versions had a prefix and suffix that could be added to the advertiser name, and now 23.6 also allows a prefix onto the GAM Campaign Name.

Advertiser Prefix	
When automatically creating a new Advertiser or Agency, this option will use this field to prefix the name used in GAM.	
Advertiser Suffix	
When automatically creating a new Advertiser or Agency, this option will use this field as a suffix for the name used in GAM. You can use a wildcard of {NAME_ID} and it will use the Naviga Name ID.	
Campaign Name Prefix	
the system will name that campaign using this prefix and then use the Campaign Name Format at the Ad Server level.	

As an example, I have selected the new Campaign Name Format option in my GAM Setup and in Product Group setup, I have put the following:

Campaign Name Prefix	NAVIGA
the system will name that campaign using this prefix and then use the Campaign Name Format at the Ad Server level.	

(So that is NAVIGA (space) (pipe) (space))

I have created this campaign:

EDITING CAMPAIGN 1929

Campaign Explorer

- Campaign
 - Campaign Setup**
 - Line Items
 - Material Management
 - Campaign Budget
 - Campaign Custom Data Forms
 - Digital Serving Analysis
 - Cash Billing

Campaign Setup

Other Information

Campaign ID 1929

Campaign Billing Type Performance Campaign

Campaign Description Kellys Test Campaign

Advertiser ID 100140

Advertiser Name Underwater World

Based on the combination of the GAM Connection Setup and the Product Group Setup indicted above, the example will come into GAM with the Campaign Name as follows:

NAVIGA | Underwater World | Kellys Test Campaign | 1929

G/L Override by Client Type

A new column has been added in the G/L Overrides node in Product Setup

PRODUCT G/L OVERRIDES

Product Setup

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

G/L Overrides

Product KS-NavigaToday

G/L Defaults

Receivables G/L Code 01*00*0000*00*1110 ACCOUNTS RECEIVABLE

Revenue G/L Code 01*01*0001*00*4100 PRINT ADVERTISING SALES CA

Agency Comm. G/L Code 01*01*0003*00*5120 AGENCY COMMISSION

Cost G/L Code Select a Specific G/L Account, a From Range

Cost A/P Code Select a Specific G/L Account, a From Range

G/L Type Overrides

Add an Override

G/L Type	Client Type	Revenue G/L Code	Agency Comm. G/L Code	Cost G/L Code	Cost A/P Code	
Print Classified OS	Local Account LOC	01*01*1500*50*3520 CLASSIFIED ADV GCI	01*01*1500*50*3520 CLASSIFIED ADV GCI			✖
Print Classified OS	Private Party ART	01*01*1000*50*3520 CLASSIFIED ADV CT	01*01*1000*50*3520 CLASSIFIED ADV CT			✖

Now the G/L selected for each G/L Override can vary based on the client type of the advertiser. To create a new GL Override, click the button "Add an Override" and a popup window will open:

PRODUCT G/L OVERRIDES

Product Setup

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

G/L Overrides

Product: KS-NavigaToday

G/L Defaults

Receivables G/L Code: 01*00*0000*00*

Revenue G/L Code: 01*01*0001*00*

Agency Comm. G/L Code: 01*01*0003*00*

Cost G/L Code: Select a Specific

Cost A/P Code: Select a Specific

G/L Type Overrides

Add an Override

	G/L Type	Client Type
	Print Classified OS	Local Account LOC
	Print Classified OS	Private Party ART

Add an Override

Industry Code Overrides

Add an Override

G/L TYPE OVERRIDES

G/L Type: [Dropdown]

Client Type: [Dropdown]

Revenue G/L Code: [Dropdown]

Agency Comm. G/L Code: [Dropdown]

Cost G/L Code: [Dropdown]

Cost A/P G/L Code: [Dropdown]

Close Apply

G/L Type, Revenue G/L Code and Agency Commission G/L code are all required fields.

Client Type is only necessary if you choose to use this feature.

Cost G/L and Cost A/P G/L Code are only required if you choose to put cost information on the campaign lines and have them affect G/L mapping. (This was a new feature in [2023.1](#))

Import option for Price Adjustment Setup

Navigate to **Setup → Product Setup** and select the new "**Price Adjustments Import**" option to import Adjustment codes for products.

IMPORT PRICE ADJUSTMENTS

Product Setup

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

Import Price Adjustments

Important Notes about the Excel Import Template:

- Columns in Bold are Mandatory.
- Columns highlighted in yellow must be a valid code ID in Naviga.
- The following columns support Comma Separated Values (CSV):
 - Ad Type(s)
 - Section(s)
 - Position(s)
- Plus / Minus column accepts +, - or blank/null. Blank/null represents either or both.
- Type column valid options are Gross, Net or Amount.
- Value accepts a positive number, negative number or blank/null (if Prompt for Value column is Y(es).
- Ad Type(s) are optional but blank/null applies adjustments to all ad types.
- Plan Position Code is only applicable if Naviga Plan is used.
- Section(s) are optional but blank/null applies adjustments to all sections.
- Position(s) are optional but blank/null applies adjustments to all positions.
- Application Rule accepts ALL, FIRST or LAST. Blank/null converts to ALL.

File to Import

- Click the button to Download Template to get the excel file needed to import adjustment codes. Fill in adjustment codes according to the following template:

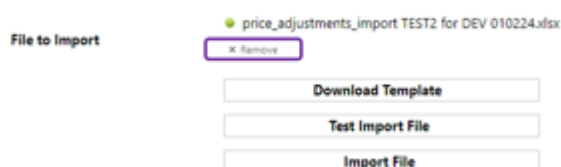
Field	Example	Description	Required?
Product ID	DEMO123	Alpha-Numeric field representing the ID for the Product	Yes
Description	Premium Surcharge	Alpha-Numeric field used to describe the adjustment. This is what the user will see when selecting an adjustment in order entry and what the customer may see on the invoice/order confirmation	Yes
External ID	ABC123	Alpha-numeric field which may be used in interfaces to external systems	Optional
Allow Description Override	Y	This is a Y/N field to indicate if the Description can be overwritten by a user in order entry screen.	Optional. If left blank an answer of No (unchecked)

Field	Example	Description	Required?
			will be applied.
Plus/Minus	-	+/- field which indicates if the adjustment should be positive (surcharge) or negative (discount). If left blank, the user will be able to select a positive or a negative adjustment in order entry	Optional
Type	GROSS	These are hard coded options in the system. Use the following to indicate the correct option: GROSS = Percent of Gross NET = Percent of Net AMOUNT = AMOUNT	Yes
Prompt for Value	Y	If set to Yes (Y) the user will be allowed to enter in a value for the discount during order entry. If set to No (blank or N), the value will need to be set in the "Value" field	Optional
Prompt for Qty	Y	Only valid if the Type is set to AMOUNT. If type is AMOUNT, this can be set to Y for Yes or it can be blank or N for No. If Type is GROSS or NET, this should be left blank.	Optional
Value	-50	If the plus/minus field is negative, this must also be negative. If Prompt for Value field is Y, this should be left blank.	Optional, but if Prompt for Value is No, this should be filled in with a value
Hide on Forms	Y	Y for Yes, N or blank for No	Optional

Field	Example	Description	Required?
Currency	POUND	Only use this for foreign currencies. For amounts in the system's default currency, this should be left blank.	Optional, but if used the currency ID from currency setup is what is expected here.
Ad Type(s)	CPCI,DCI	This will allow the adjustment to only be available for certain ad types. Leave blank to allow for all ad types. Multiple ad types can be entered and comma separated	Optional, but if used, the values entered here must match the Ad Type ID's in Ad Type setup
Plan Position Code	FIRST	Used for Sorting in Naviga Plan. See Price adjustment Setup for details	Optional. Leave blank if not using Naviga Plan
Section(s)	NEWS,LOCAL	This will allow the adjustment to only be available for certain sections. Leave blank to allow for all sections. Multiples can be entered and comma separated	Optional, but if used, the values entered here must match the section ID in Product Setup
Position(s)	BP	This will allow the adjustment to only be available for certain sections. Leave blank to allow for all sections. Multiples can be entered and comma separated. If Positions are defined within a section according to product setup, then the section must also be entered on the template for position to be accepted.	Optional, but if used, the values entered here must match the Position ID in Product Setup.

Field	Example	Description	Required?
Override G/L Account	01*002*123* 1234	This will allow the Adjustment to be applied to a different G/L than the revenue for the order line. See Price Adjustment setup for details on using this optional field.	Optional, but if used it must match a G/L code defined in the G/L setup
Application Rule	LAST	This is only used in Booking Wizard order Entry and allows for the adjustment to be applied only to the First insertion, Last Insertion, or All insertions. Valid options here are FIRST, LAST, and ALL. A Blank will assume all insertions.	Optional
Inactive	Y	Leave blank for No. This sets the Adjustment code	Optional

- Once the spreadsheet is filled in with your data, save the file to your computer or desired network location.
- Click the Select button and navigate to the file location
- Click test import file. The system will do a test import and will notify the user if there are any errors in importing. If there are no errors, skip to step 8
- Open saved spreadsheet and correct any errors, and resave
- Remove the original uploaded file by clicking the X remove



- repeat steps 3 - 6 until all errors are resolved
- Click Import File to run the actual import process.

Group Security Change

Disallow campaign status change from R back to Q

New flag added to disallow campaign status change from R back to Q. If you set this option to Yes, it will prevent users in this security group from reverting campaigns in any Reserved status to Quote status manually or through the Bulk Update Process. You might want to consider setting this to yes if you have integrations with downstream systems that send the ad somewhere else when the order becomes reserved.

6
DISALLOW CAMPAIGN STATUS CHANGE FROM R BACK TO Q
☐ No
Setting this option to Yes will prevent users in this security from reverting campaigns in any Reserved status to Quote status manually or through the Bulk Update Process.

Restrict G/L Type in line override to codes on product

20
RESTRICT G/L TYPE IN LINE OVERRIDE TO CODES ON PRODUCT
☒ Yes

In product setup, G/L Overrides can be assigned to the product which then get used in ratecards and ultimately on line items so that the system knows what G/L to assign during billing. Group Security dictates if this G/L Type can be overwritten at the line item level. This new group security controls if ALL G/L Types or only G/L Types used on the product are available to be selected (assuming the user is allowed to override the G/L type assigned by the ratecard line). If this is set to 'no' AND users are allowed to override the G/L Type on a line, then all G/L Types will be displayed in the dropdown.

Fields added to several screens

Advertising Client Type and Prepay Required added to the Client overview screen:

UNDERWATER WORLD

Overview

MediaRadar

Other

Rep Access

Account ID

255128

Account Type / Client Type

Customer / Local Account (LOC)

Parent Account

Website

Telephone

(215)672-4180

Source(s)

Account Status

In Good Standing

Credit Limit

99,999,999.00

Account Balance

135,747.00

Card(s) on File

Yes

Billing Currency

Local Currency

Account Approval Status

Approved by Kelly Smith on Friday, March 15, 2019 12:00

Pre-Payment Required

No

Map

Addresses

My Contacts

Selected Address

[265957] 495a Easton Rd Horsham, P.

View Larger Map

495 Easton Rd

495 Easton Rd, Horsham, PA 19044

View larger map

Client Type added to the Invoices & Payments node on a campaign:

BILLING SUMMARY

Campaign Explorer

Campaign

Campaign Setup

Line Items

Material Management

Campaign Budget

Campaign Custom Data Forms

Digital Serving Analysis

Co-op Billing

User Defined Fields

Notes / Comments

Revenue Allocation

Production Contacts

Tearsheet Contacts

Generate Proposal / Confirmation

Attachments

Invoices & Payments

Billing Summary

Campaign ID

14204

Advertiser

Round Guys Brewing Company

Client Type

Extra Accounts (EXT)

Brand

Round Guys Brewing Company

Agency

Status

Quote 1- Early Pipeline (26%)

Start Date

11/5/2023

End Date

12/31/2023

Gross Amount

16,200.00

Commission Amount

0.00

Net Amount

16,200.00

Est. Tax

1,080.00

Currency

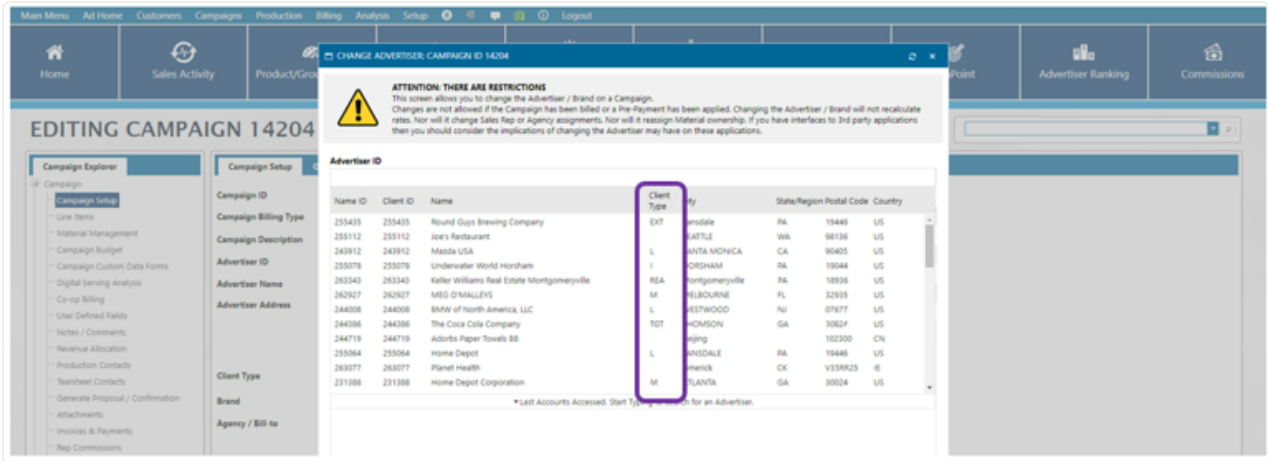
Local Currency

Pre-Payments

Enter a New Payment

Payment Type	Bank	Deposit Date	Reference No.	Card Number
--------------	------	--------------	---------------	-------------

Client Type added to popup when changing the advertiser on a campaign (on a campaign, select edit → change Advertiser to see this popup):



i If you don't see the option to change the advertiser, remember in [2023.4](#) this was added to group security so a user must have permission to be able to change the advertiser on a campaign.

Client type (ID and Description) added to the Report **Customers → Advertiser Listing**

ADVERTISER LISTING										
List of Advertisers										
This screen lists all advertisers that have had advertising orders entered against them, including quotes. Advertisers with no quote / order history will NOT be returned in this report.										
ID	Name	Client type ID	Client type	Address	City	State/Province	Zip/Postal Code	Country	Phone	Created On
263137	"A" Locksmiths - BB Access Group			1023 Crescent Heights	West Hollywood	CA	90046	UNITED STATES		2/3/2023
214834	1350 BAY STREET			The Road			W1	UNITED KINGDOM		4/8/2009
256827	Import1									1/25/2022
241380	7.3 TEST COMPANY			1515 WASHINGTON BLVD	STAMFORD	CT	06901	UNITED STATES	*****	3/30/2009
241418	7.A TESTING ACCOUNT			1236 ARNOW AVENUE	BRONX	NY	10469	UNITED STATES		1/21/2010
102063	A & M Chemical Manufacturing			2805 Alternate 27 S	ATLANTA	GA	30305	UNITED STATES	*****	9/20/2004
103666	AB SALON EQUIPMENT			14220 66th STREET NORTH SUITE E	CLEARWATER	FL	33764	UNITED STATES	*****	12/5/2001
263056	AB Stenstroms Skjortfabrik	L	International	1 Regementsvågen		BLE	25437	SWEDEN	*****	12/16/2022
103674	ABBE COSMETIC GROUP INTL INC			1095 ROUTE 110	FARMINGDALE	NY	11735	UNITED STATES	*****	2/22/2000
220687	Abbott Laboratories			100 Abbott Park Road	NORTH CHICAGO	IL	60064	UNITED STATES	*****	6/19/2015
255613	ABC Company	KEY	Key Accounts	123 main st	NEW YORK	NY	10011	UNITED STATES	*****	3/24/2021
194867	ABC Company			1234 Main Ave	NEW YORK	NY	10013	UNITED STATES	*****	7/16/2017

Prepayment Required Flag added to the Account Approval Screen:

ACCOUNT APPROVALS

Created by User ▼ Created Date From 3/1/2023 Created Date Through 3/31/2023 Approval Status Pending Approval Account Types Company ▼ Get Data

ID	Name	Account Type	Client Type	Created Date	Created by User	Address	Approval Priority Code	Pre-Payment Required	Credit Application on File
21100044	James Stuart	Advertiser	Private Party	3/6/2023	Wayne Burrows	1111 Palm Canyon BEVERLY HILLS, CA 90210 US		☒	☐
21100064	Ice Manufacturer	Advertiser	National Account	3/9/2023	Wayne Burrows	1908 Long Row, CATHEDRAL CITY, CA 92234 US		☐	☐

Approve Selected

Two new columns has been added to the Payments tab on the Accounting screen of the Customer account overview. This will display the Cash on Account reason and any comment entered when applying payments.

Payment ID	Type	Comment	COA Reason	Date	Amount	Cash on Account	Pre-Payment
255128*2280.CC	CC			9/27/2023	5,040.13	0.00	☐
255128*2273.CC	CC	pay via pay link 20230630 [Submitted by Portal User]		6/30/2023	367.11	0.00	☐
255128*2265.CC	CC		Some COA for no good reason	6/12/2023	20,129.93	20,129.93	☐
255128*2262.CC	CC	woo-hoo new payment		5/18/2023	3,479.00	0.00	☐
255128*2263.CC	CC	PRE-PAYMENT FOR 11100035	PP	5/18/2023	45,000.00	45,000.00	☒
255128*2264.CC	CC	paid via phone 5/18		5/18/2023	4,893.33	0.00	☐
255128*2255.CC	CC			3/1/2023	5.00	0.00	☐
255128*2256.CC	CC			3/1/2023	5.00	0.00	☐
255128*2257.CC	CC			3/1/2023	5.00	0.00	☐
255128*2258.CC	CC			3/1/2023	6.00	0.00	☐
					95,939.50	65,129.93	

Page: 1 of 2 Go Page size: 10 Change Item 1 to 10 of 19

Advertising Home screen - Campaign Tab - added Campaign Description to the grid here:

Customer Search Go									
Last Accounts Campaigns									
ID	Advertiser	Brand	Product Group	Campaign Description	Start Date	End Date	Type	Status	Net Amount
14351	Joe's Restaurant	Joe's Restaurant	ABC - Kelly's Co.	Test multi-rep	1/1/2024	1/31/2024	Performance	R1	8,750.00
14401	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	4,600.00
14400	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	9,500.00
14399	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	4,600.00
14398	BMW of North America, LLC	3 Series	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	3,887.00
14397	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	23,000.00
14396	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		1/1/2024	2/29/2024	Performance	Q1	10,500.00
14204	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.		11/5/2023	12/31/2023	Performance	Q1	16,200.00
14395	Joe's Restaurant	Joe's Restaurant	ABC - Kelly's Co.		1/1/2024	1/31/2024	Performance	Q1	23,000.00
14376	Mazda USA	Compact Cars	ABC - Kelly's Co.		12/17/2023	1/31/2024	Performance	CO	69,345.35
14352	Joe's Restaurant	Joe's Restaurant	ABC - Kelly's Co.	Test multi-rep	2/1/2024	2/29/2024	Performance	R1	8,750.00
14346	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.	Insert Campaign	12/10/2023	12/31/2023	Performance	CO	3,992.82
14340	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.	test cost	1/1/2024	1/31/2024	Performance	IS	3,148.20
14336	Underwater World Horsham	Tim's Brand	ABC - Kelly's Co.		12/10/2023	12/31/2023	Performance	CO	3,800.00
14333	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.	Preprint / Insert with G/L Types and Adjustments	12/10/2023	12/31/2023	Performance	IS	23,087.61
14332	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co.	Preprints / Inserts	12/10/2023	1/31/2024	Performance	IS	22,236.95
14188	Round Guys Brewing Company	Round Guys Brewing Company	Demo Group	Preprints	11/12/2023	12/1/2023	Performance	IS	3,837.00

Client Type added to the Agency field dropdown on Brand Detail screen
(Customers → Brand → Brand Maintenance):

Brand Setup
Brand Detail
OLD Rep Assignments
Rep Assignment
Billing Overrides
Production Contacts
Teasheet Contacts
Division Setup
Division Detail
Exhibition Group Overrides
Orders
List of Orders

? An Advertiser can have multiple Brands. For example, Advertiser Coca-Cola could have brands such as Coke, Diet Coke, Fanta. Agency assignments and Industry Categories are defined at the Brand level.

Advertiser ID: 244008
Advertiser Name: BMW of North America, LLC
Brand ID: A1
Brand Name: 3 Series
Industry Category/PIB: Auto Manufacturers - Foreign
Ad Index Name:
Allow use on Portal: Yes
Inactive: No

Other Settings
Default Discount % on Advertising Campaigns:
Agency:
Agency Name:
Production Controller:
Campaign Manager:
Actuals Reconciliation:
Notes:

Name ID
Client ID
Advertiser Client Type
Name
City
State/Region
Postal Code
Country

100180	BABO.2		Bertie Bogle Hegarty	NEW YORK	NY	10010	UNITED STATES
101850	OGPR		OGILVY PRIMARY CONTACT	LONDON		EC1M 4PJ	GREAT BRITAIN
241022	241022	M	Ogilvy & Mather	NEW YORK	NY	10017	UNITED STATES
255501	255501		Zero Gravity Marketing	MADISON	CT	06443	UNITED STATES

✓ UpVote Fields added to Orders by Product Report: Material Description, Campaign Entry Date (click on Configure output tab to choose which columns to display):

Selected Campaign Lines													
Configure Output													
Drag a column header and drop it here to group by that column													
Page: 1 of 4 Size: 50 Change													
Advertiser	Advertiser ID	Product	Line Start	Line ID	Entered Date	Material Desc.	Actual Net Amount	Campaign	Order Sales Rep(s)	Brand Sales Rep(s)	Type	Ad Type	Status ID
Naviga Global	258378	The Star Daily Newspapers	12/14/2023	39180	12/1/2023		2,993.00	14329	Wayne Burrows		Performance	Display Advertising	CO
Burlington Textiles Corp of America	255341	The Star Daily Newspapers	12/6/2023	38952	11/20/2023		16.00	14252	ALLULUBY NGENTINSALE		Performance	Column x Agate Drip	CO
Casa de Marquez	264912	The Star Daily Newspapers	12/28/2023	39257	12/16/2023		4,806.21	14386	Pureza Monticlan		Flexible	Display Advertising	CO
Casa de Marquez	264912	The Star Daily Newspapers	12/27/2023	39257	12/16/2023		5,106.21	14386	Pureza Monticlan		Flexible	Display Advertising	CO
Casa de Marquez	264912	The Star Daily Newspapers	12/22/2023	39257	12/16/2023		4,806.21	14386	Pureza Monticlan		Flexible	Display Advertising	CO
Planet Health Club	263063	The Star Daily Newspapers	12/10/2023	39220	12/6/2023	Test 1	52.50	14343	Fearghal O'Sullivan		Performance	Display Advertising	CO
PORT OF EGYPPT	241515	The Star Daily Newspapers	12/25/2023	39294	12/15/2023		4,500.00	14375	Debra Zoller, Brittany Griffin-Folk		Flexible	Display Advertising	IS
Planet Health Club	263063	The Star Daily Newspapers	12/20/2023	39238	12/11/2023	Test bleed	2,990.00	14354	Fearghal O'Sullivan		Performance	Display Advertising	CO
Corey Construction	263256	The Star Daily Newspapers	12/16/2023	39231	12/11/2023		244.00	14350	Kelly Smith (KEP KELLYS)		Performance	Display Advertising	CO
Star Newspaper House Account	265007	The Star Daily Newspapers	12/16/2023	39230	12/11/2023		0.00	14349	Amanda Enderle		Performance	Display Advertising	CO

Orders by Entry Date Report Changes

Several great changes on the Orders by Entry Date Report:

Home	Sales Activity	Product/Group Analysis	Product Analysis	Publication Analysis	Campaign Budget Analysis	Digital Delivery	Pinpoint	Advertiser Ranking	Commissions												
ORDERS BY ENTRY DATE																					
Product Group		or Select Product(s)		User(s)		Entered On or After		Entered On or Before													
Naviga Product Group		Type here to filter/search		Type here to filter/search		2/05/2023		2/23/2023													
Report Template		Check All		Link		Apply Filters to Data		Clear Filters													
Selection / Filter Criteria		☐ Advertiser AdMix (ADM) ☐ Advertiser Audience (AUD) ☐ Advertiser Email (ADM) ☐ Advertiser Geofencing (AGEO) ☐ Advertiser SEM (ASEM) ☐ Advertiser SEO (ASEO) ☐ Advertiser Social (ASOC) ☐ Advertiser Specialized (ASPC) ☐ Advertiser Video (AVID) ☐ Automobile Mag Website (MAG7) ☐ Automobile Magazine (MAG3) ☐ Biking Mag Website (MAG8) ☐ Biking Magazine (MAG2)		☐ Check All ☐ Alice Accounting (ACCTGUSER) ☐ Amber Day (ACCTGUSER) ☐ Bob Haggie (SALESUSER) ☐ Donna Beasley (DEASLEY) ☐ Hugh Grantley (HGRANTLEY) ☐ John Pihlman (SALESUSER) ☐ Kelly Smith (KSMITH) ☐ Mark McCord (MAMCORG) ☐ Patty Payables (PAYABLES) ☐ Polly Producer (PRODUCTION) ☐ Ronnie Wells (RWELLS) ☐ Sally Sales Manager (SALESMAOR) ☐ Sam Moneybags (ACCTGUSER)		Highlight Matches		Clear Highlighting													
Selected Campaign Lines Configure Output Drag a column header and drop it here to group by that column Page: 1 of 1 Size: 24 Change																					
Line Entry Date	Product	Line ID	Campaign	Ad Type Name	Type	Description	Sales	Campaign Status	Ad Server Line ID	Advertiser	Line Start	Line Type	Sales Rep(s)	Net P.P.	Rate	Est. Qty	Est. Gross Amount	Est. Net Amount	Qty Served	Currency	Entered By
2/23/2023	Naviga Magazine	5188	1640	Print Display, Modular	Performance	1/2 Page (H) (bta g)	1/2 Page (H) (btag)	IS		BHW UK	4/1/2023	FF	Hugh Grantley		8,000.00000	1	8,000.00	8,000.00	0		KSMITH
2/23/2023	Naviga Magazine	5189	1640	Print Display, Modular	Performance	Full Page (btag)		IS		BHW UK	5/1/2023	FF	Hugh Grantley		12,240.00000	1	12,240.00	12,240.00	0		KSMITH
2/22/2023	The Naviga Website	5181	1637	Digital Sponsorship/Flat Rate	Performance	Sponsorship/Flat Rate		IS		Art UK	3/1/2023	FF	BOB HUGGIE		1,125.00000	1	305.44	305.44	0	GBP	HORANTLEY

- Users (multi-select) added to the search criteria at the top of the report
- Product list uses intuitive typing to filter the dropdown, making selection easier
- Grouping added to the report so that user can drag and drop column headers to the light blue bar to group data by various fields
-  **UpVote** Several additional columns added to the configure output tab
 - Campaign Entry Date
 - Existing field "Entry Date" relabeled as "Line Entry Date"
 - Campaign Description

Sort order for Classified Categories

In previous releases, user could drag and drop category metadata questions in setup to set the sort order, but parent level questions were always displayed at the top (in whatever sort order was set for the parent), and child questions would be displayed after the parent, in whatever sort was set for the children, and they could not be intermingled at all, and the child questions could not be asked before the parent questions. That has now been modified and setup users can enter sort codes at the parent (for the parent metadata) and at the child (for child metadata) and when in use these codes will allow the metadata to flow in a logical order to the end user, and parents and children may be intermingled together. The sort is an alpha-numeric sort, so if you are using numbers, if you have more than 9 questions, be sure to pad the numbers with zeros in front. For example, if you have 15 questions, you would list them 01, 02, 03...10, 11, 12, etc.

In this example, Employment is the parent, and Full Time Help is the child. Only a single question is asked at the child level, but the desire was to present it to the user, right after the headline and main body text:

EDIT CATEGORY							
Category Setup		Classified Stylesheet	Category MetaData				
Level	Label/Question	Prompt Type	Validation	Formatting	Merge Tag	Required	
Employment	Headline/Job Title Sort Code 01	Single-Line Text Allow in Self-Serve	No Validation Maximum Characters (Leave		HEADLINE	☐	✖
Employment	Long Description Sort Code 02	Multi-Line Text Allow in Self-Serve	Maximum Characters (Leave		LONG_DESCRIPTION	☐	✖
Employment	Salary Range Sort Code 04	Number Range Allow in Self-Serve	Minimum Value Maximum Value	Zero Decimals	SALARY	☐	✖
Employment	Salary Type Sort Code 05	Dropdown List Selector Allow in Self-Serve	Multi-Select Allow Custom Text Per Hour,Per Year		SALARYTYPE	☐	✖
Employment	Benefits Sort Code 06	Dropdown List Selector Allow in Self-Serve	Multi-Select Allow Custom Text 401(k),Medical Insurance, Paid Vacation,Flexible Hours		BENEFITS	☐	✖
Employment	OwnLocal Sort Code 12	True/False Prompt Hide in Self-Serve			OWNLOCAL	☐	✖
Employment	Start Date Sort Code 13	Date Allow in Self-Serve		Short Format (Loca	STARTDATE	☐	✖
Full Time Help	Hours per week Sort Code 03	Number Range Allow in Self-Serve	Minimum Value Maximum Value	Zero Decimals	HOURS	☐	✖
		Allow in Self-Serve				☐	✖

When presented to the end user, this then looks like this:

Note: only internal users currently will see this new sort. Not currently in use for Classified Self-Service Portal.

Zone Export/Import for Preprints

Navigate to **Setup → Product Setup** and select the Zone Export/Import node on the left side navigation tree. The important differences in this new import when compared to the other existing imports is that this import is only for configuration imports and updates. **It is NOT for importing Zone counts for the issues as there are no quantities in this template...this is just importing for Zone Setup.** Continue to use the existing Zone Import or Zone Import by Date Range for importing the distribution counts for issues.

ZONES EXPORT / IMPORT

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
 - Price Adjustments Import
 - Auto Adjustments

Zones Export / Import

Important Notes about the Excel Import Template:

- All columns in bold are required to be present in the spreadsheet when imported

File to Import

Test Import File

Download Template

Export Existing Data

If the desire is to create brand new Zones from scratch, user can start with the "Download Template" option to download a blank template to then fill in all the required and desired optional fields. If the desire is to update existing data, or do a combination of updating and new zones, then the user can start by Exporting existing data into excel, making modifications, and then importing back in.

Zone Export/Import Template

The following fields are available in this template:

Field	Example	Description	Required?
Product ID	DEMO10	The ID must match that of a product in the advertising system	Yes
Zone ID	19456	The Zone ID must match the zone ID in the advertising system	Yes
Zone Description	Anycity	Text describing the zone	Yes - This is what the user selects in the UI - so while the import won't fail if it is empty, it won't be very useful if it's blank, so DO fill it in.

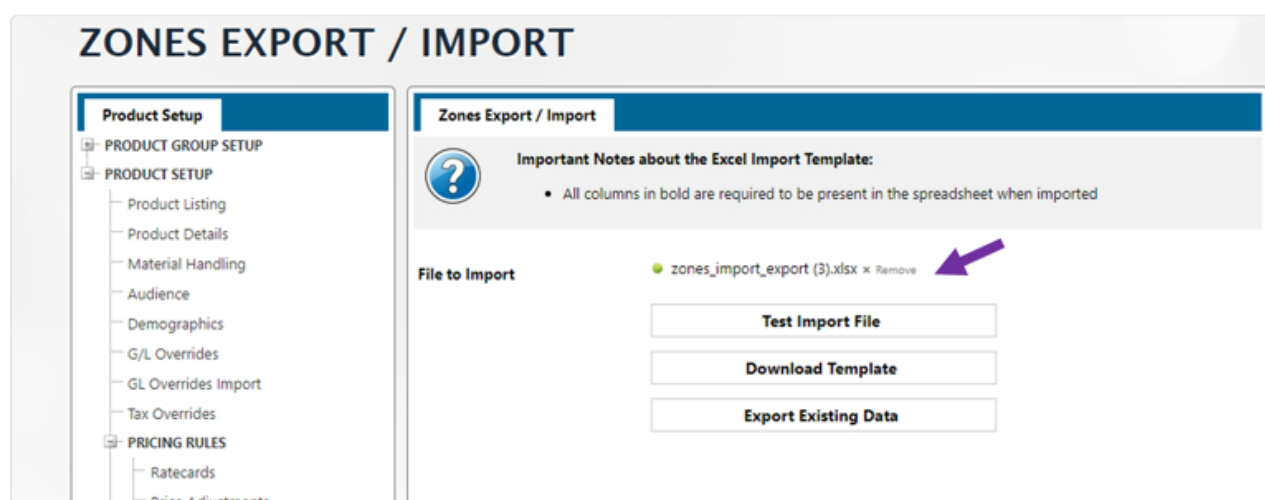
<https://open.gitbook.com/~space/8rrajXEgsPTtIYT9NjjZ/~changes/r7VRz1e75R2Kfuuf9tN2/~gitbook/pdf?back=false&only=yes&page=zuAFhC62Hg8as7h...>

45/67

Field	Example	Description	Required?
Parent ID	NE	The zone group / parent ID of the zone for the zone to be imported and must match the value in the advertising system	Optional, but it's a good idea for ease of use for the end users to have at least one Zone Group.
Sort Code	1	Value by which the zone is sorted in the list as displayed on menus for users.	Optional
Country Code	US	This is the 2-digit ISO Country Code.	Optional for the Import - will be required for Geocoding if intent is to allow users to select zones from a map in order entry
Postal Code	19456	5-digit zip code for the zone.	Optional for the Import - will be required for Geocoding if intent is to allow users to select zones from a map in order entry
External Reference	ABC123	Alpha-numeric Field used in integration with 3rd party.	Optional - If updating existing records and this field is blank, it will be ignored. If it has data in it, it will overwrite what is existing.
External Group	ABC	Alpha-numeric Field used in integration with 3rd party	Optional - If updating existing records and this field is blank, it will be ignored. If it has data in it, it will overwrite what is existing.

Field	Example	Description	Required?
Is Inactive	TRUE	TRUE/FALSE field for whether or not the Zone is Inactive.	Optional

This import has a new screen to visualize the data and confirm it prior to import. Once the template is filled in with all the desired details, navigate to that file location by clicking on the select button and selecting that file.



Then click the button Test Import File. Screen will appear with columns from the spreadsheet and results displayed if items are new, changed or unchanged. This gives the user a visual and a chance to go back to the spreadsheet and make modifications if this is different than expected. For example, If I thought I was creating 3 new Zones below, when I saw this and noticed that two of the Zones already existed and what I was importing was different than what was already there, I might want to look at those changed items and see what was there already and make sure I wasn't making a mistake.

IMPORT FILE DETAILS

IMPORT TEST RESULTS

Total Items	New Items	Updated Items	Unchanged Items
3	1	2	0

1

Page: 1 of 1 Go Page size: 3 Change

Item 1 to 3 of 3

	Product ID	Zone ID	Zone Description	Parent ID	Sort Code	Postal Code	Country Code	External Reference	External Group	Is Inactive	New	Changed
1	QA1	19426	19426 - Skippack	SKP	1942611	19426	US	ABC1234	ABC	☐	☐	☒
2	QA1	19430	19430 - Skippack	SKP	1943011	19430	US	ABC123	ABC	☒	☐	☒
3	QA1	19404	19404 - Skippack	SKP	19404	19404	US			☐	☒	☐

1

Page: 1 of 1 Go Page size: 3 Change

Item 1 to 3 of 3

Cancel

Import Data

If the above screen is displaying what I expected to see, then I can click the button at the bottom of the screen to go ahead and import that data. Click Cancel to go back to the previous screen. If there were errors that needed to be changed, click the X to remove the file, then open it in Excel to make desired changes and re-do the select and Test Import file process.

Edit Material Ad Headline

Navigate to **Production → Update Page Numbers in an Issue** in the Advertising Module.

The Update Page Numbers in an issue report will now display, and allow for editing, the Ad Headline for the material. (Note that the order line must already have a material ID to be able to add a headline to it. This CAN be auto-created when the line is first saved if configured to do so on the product setup)

UPDATE PAGE NUMBERS IN AN ISSUE

Selected Product: The Star GA Daily Newspaper Issue: 1/15/2024 Get Orders

Orders in Issue

Generate Label File

Page: 1 of 1 Page size: 4

ID	Campaign	Advertiser	Advertiser	Brand	Agency ID	Agency	Material ID	Ad Headline	Material Status	Campaign Status	Size Description	Ad Type	Agency	Editor ID	Editor	Section ID	Section	Position ID	Position	Teasheet URL	Page No.
39332.0	14351	255112	JOE'S Restaurant	JOE'S Restaurant			14954	Text heads		Reserved 1- Contract Signed	1/4 Pg BS	NR	Display Advertising			NEWS	News Section	RODNEWS	Run of Section	https://teasheet.com	12
39381.3	14395	255112	JOE'S Restaurant	JOE'S Restaurant			15053			Quote 1- Early Pipeline (28%)	1/2 Page	NR	Display Advertising			BUS	Business Section	BUSADP	Run of Section		
39386.3	14396	255435	Round Guys Brewing Company	Round Guys Brewing Company			15060			Quote 1- Early Pipeline (28%)	1/4 Pg BS	NR	Display Advertising			NEWS	News Section	RODNEWS	Run of Section		
39387.3	14397	255435	Round Guys Brewing Company	Round Guys Brewing Company			15065			Quote 1- Early Pipeline (28%)	1/2 Page	NR	Display Advertising			OPIN	Opinion				

Page: 1 of 1 Page size: 4

Save Changes

INVOICES: 2024.1 ACCOUNT: DEV/DIGITAL YOU ARE LOGGED IN AS Kelly Smith (USER KSMITH) (KSMITH) SECURITY GROUP: ROOT LANGUAGE: English (en-US) (Browser Default) © 2024 VANTAGE All Rights Reserved

New Merge tag added for Invoices

A new merge tag called #MODULAR_SIZE# has been added. The previous tag (#AD_SIZES#) is still available, but that included both the name and the dimensions. The new tag only includes the name.

Intervals for Classified Packages

When setting up a classified package, there has always an option to restrict to certain days of the week and to put a quantity on the number of issues, but the quantity would always select consecutive issues, unless issue days were restricted, so it was difficult to do a weekly package that would run once a week on any day, but always the same day from week to week. Now, there is an interval option on package setup. The default upon upgrading will set this to "days" on existing packages, since that will be the behavior it has always been, but the setup user can select Week(s) or Month(s) instead:

Product Group

ABC - Kelly's Co.

Default Template

Standard Legal, No Border - pkg rate

Other Optional Templates

Standard w/Border - Package Price (STDPKG)

Valid From

9/4/2023

Valid Through

12/31/2025

Available on Classified Self-Service Portal

☒ Yes

Flat Fee Package

☐ No

Flat Fee Amount

Prompt for Product Selection

☐ No

Minimum Product Selection Allowed

Prompt for Package Multiplier

☐ No

ProductsOnline Options

Product	No. of Issues	Interval	Issue Day Restrictions
The Star QA Daily Newspaper QA1	6	Month(s) Day(s) Week(s) Month(s)	

In the above example, if weeks was selected, without any issue day restriction set, the behavior will be to run the ad for 6 consecutive weeks (one issue per week) starting from the start date of the package. The default will be the start date of the campaign, but prior to selecting the package, the user can select a different start date in the booking wizard. The result will be to schedule 6 insertions on the same day of week as the start date.

BOOKING WIZARD

Product Selection

Category MetaData

Create Material

Adjustments

Price Breakdown

Book & Pay

Start Date

Sunday, January 14, 2024

Select a Package [this will first clear the grid]

Dynamic Price Self Service - KS2 (\$S1)

Select a Category Tree

Legal Ads

Select a Category

Legal Ads → Bankruptcy

or Select Product(s)

Affidavits

Delete All Lines

Product	Issue / Run Dates	Layout	Delete
The Star QA Daily Newspaper QA1	Sunday, January 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, January 21, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, January 28, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, February 4, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, February 11, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, February 18, 2024 Multi-Select	7Column (Plan Layout) 7C	✖

Next

If 6 months was selected in the package setup, the behavior would be to run one issue per month on the same day of month as the start date, so in the below example it is the 14th day of the month, each month, for 6 months.

BOOKING WIZARD

Product Selection

Category MetaData

Create Material

Adjustments

Price Breakdown

Book & Pay

Start Date

Sunday, January 14, 2024

Select a Package [this will first clear the grid]

Dynamic Price Self Service - KS2 (SS1)

Select a Category Tree

Legal Ads

or Select Product(s)

Select a Category

Legal Ads → Bankruptcy

Affidavits

Delete All Lines

Product	Issue / Run Dates	Layout	Delete
The Star QA Daily Newspaper QA1	Sunday, January 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Wednesday, February 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Thursday, March 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Sunday, April 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Tuesday, May 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖
The Star QA Daily Newspaper QA1	Friday, June 14, 2024 Multi-Select	7Column (Plan Layout) 7C	✖

Next

Change to Campaign Detail Read-only screen

On the A/R invoice Detail, A/R Payment Detail and several other screens within the system there was a link to the Campaign ID here:

Company: Hoover USA [100168]

Select an Edit Option

Open Invoices

Quick Look-up by ID

A/R INVOICE DETAIL

Header

Invoice ID	IN6050T	Source Module	INET
Invoice Date	1/9/2024	Financial Period	2024-01
Entry Date	1/9/2024	G/L Post Date	Unposted
Due Date	3/9/2024	A/R Batch	IN688T

Financial Summary

	Local Currency	Foreign Currency
Amount	20,000.00	0.00
Tax	0.00	0.00
Balance	20,000.00	0.00

Order Details

ID	Module	Product	MM Contract
1586	INET	Naviga Product Group	

Attachments

Attachment

-- No Records Returned --

Other Details

P.O. Number / Ref.	2023 plan ads	Discount Amount	
Contended Amount		Discount Date	1/9/2024
Contended Date		Recommended for Refund	No
Contended Reason		Recommended Refund Method	
		Recommended By	

This link would take the user to a read only screen with details about that order, which looked like this:

Advertiser: Hoover USA [100168]

PERFORMANCE CAMPAIGN DETAIL

Campaign Header

Campaign ID

1586

Campaign Desc.

2023 plan ads

Advertiser

Hoover USA

Brand

Hoover USA

Agency

Product Group

Naviga Product Group

Financial Summary

	Local Currency	Foreign Currency
Campaign Amount	208,000.00	0.00
Agency Commission	0.00	0.00
Net Amount	208,000.00	0.00
Tax Amount	0.00	---

Product Details

Campaign Details

Rev. by Product

Rev. by Period

Rev. by G/L Type

Journal Entries

Current Reps

Original Reps

Campaign Production Contacts

Name	Type	Phone	Email
Stanley Hoover			navigademotest2+hoover@gmail.com

Confirmations Sent

Confirmation No.	Created By	Date Created	Emailed To	Sent by	Sent on	Sent at
-- No Records --						

User Defined Fields

Confirmation Comments

Invoice Comments

Internal Notes

This screen was outdated and didn't give the users access to actually DO anything with the campaign, which could be frustrating for many users.

Going forward, that link to the order will now direct users to the campaign itself rather than a summary of the campaign details. Users who have permission, will then be able to make edits and users without permission will only be able to view the campaign and not make any changes. The exception to this will be for cancelled campaigns. If you attempt to open a cancelled campaign, user will be redirected to older campaign details screen.

For any sites that were previously managing campaign permissions by simply hiding the menu options to edit a campaign or create a new campaign, you will want to visit the [Advertising Group Security](#) settings for those user groups and ensure that you set up some group security to prevent those users from editing campaigns. If they shouldn't edit ANY campaign, I would recommend ensuring that

the Status setting #5 - "Restrict Order Status Available to Members of this Group" has all the statuses in the left column (not-allowed). In addition, visit the section [Campaign Header Security](#) and remove appropriate permissions from there as well...this part restricts the edit permissions on the campaign header screen dropdown (top right of the screen).

CRM Module

Group Security Change

New Flag in Opportunities which will allow for a single opportunity to cross multiple product groups, and when the proposal is auto-generated, there will be multiple proposals/campaigns created - split by the primary product group on product setup.

6

ALLOW MULTIPLE GROUPS WHEN AUTO-GENERATING PROPOSALS
☐ No

To use this feature, set the above to "yes" and then create an opportunity and link products from different product groups:

Products											
Apply Sort											
Copy	Sort	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty	Price
	0	QA1	The Star QA Daily Newspaper	2025 Display Rates (2025G)	1/2 Page	Business Section Business Run of Se	1/1/2024 Multi-Select	NR	4,500.00000	1	4,500.00
	0	DEMO10	The Star Daily Newspapers	20XX Ratecard (69)	1/2 Page	News Section Run Of Section	1/1/2024 Multi-Select	NR	2,600.00000	1	2,600.00
Add a Package + Add a Product: The Star Daily Newspapers											

From there, click the button to auto-create a new proposal

Proposals & Campaigns

Add New Proposal / Campaign

Auto Generate New Proposal / Campaign

Use for Reporting	ID	Brand	Agency	Description
-------------------	----	-------	--------	-------------

Quick entry screen will open and allow for any modifications to dates, prices, etc before checking inventory and booking:

AUTO GENERATE PROPOSAL

Lines	Category	MetaData	Notes						
Delete	Product	Ratecard / Edition	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
	The Star QA Daily Newspaper QA1	2025QA1Da	1663 1/2 Page Full color VIEW PRODUCT INFORMATION	Business Section Business Run of	1/1/2024 Multi-Select	NR	1 CHECK INVENTORY	4,500.00 EFFECTIVE RATE 4,600.00 RATECARD RATE	4,500.00
	The Star Daily Newspapers DEMO10	69	136 1/2 Page Color VIEW PRODUCT INFORMATION	News Section Run Of Section	1/1/2024 Multi-Select	NR	1 CHECK INVENTORY	2,600.00 EFFECTIVE RATE 2,600.00 RATECARD RATE	2,600.00

Two proposals will be auto-generated for this campaign, one for each product group:

Proposals & Campaigns

Add New Proposal / Campaign

Auto Generate New Proposal / Campaign

Use for Reporting	ID	Brand	Agency	Description	Status	Proposal Date	Sales Rep	Net Amount	Remove
☐	14413	Ed Guckin		test Split Opp/proposal	Quote 1- Early Pipeline (26%)	1/1/2024	JS	2,600.00	
☐	14412	Ed Guckin		test Split Opp/proposal	Quote 1- Early Pipeline (26%)	1/1/2024	JS	4,500.00	

Link an Existing Proposal / Campaign: [Link](#)

With the new group security flag set to "no", the opportunity would behave like it did in older versions and all products would need to be in the same product group and they would be booked onto a single campaign. The default behavior upon upgrade will be for this flag to NOT be set and the system will continue to behave as it did in prior releases.

Accounts Receivable Module

List of Imported Payments

Minor makeover on the List of Imported Payments. Navigate to **Payments → List of Payments → List of Imported Payments**. Note that the Company ID has been added as a new column and there is now a row of filters at the top of the columns.

Payment ID	Company ID	Client	Date	Currency	Amount
2022242	255243	Minnesota Twins	2/21/2022		444.00

Option to require an address to approve accounts

There is a new setting on the A/R header (**A/R Module → Setup → Admin → A/R System Setup**), then navigate to Client Defaults Section. If the following is set to yes, the account will not be allowed to be approved if the address or phone number missing on the account.

15

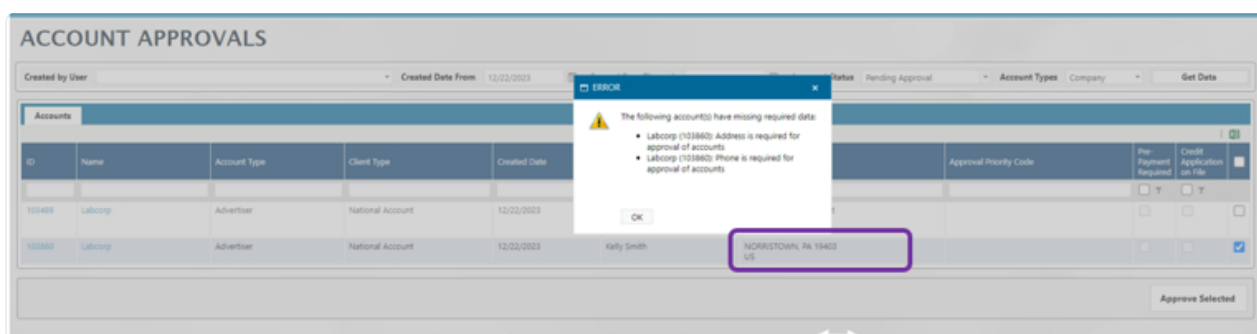
ADDRESS IS REQUIRED FOR APPROVAL OF ACCOUNTS

☐
No

Note - based on CRM System Settings (**CRM Module → Setup → CRM System Settings**) it may or may not be required for the CRM user to enter in the address at the time of account creation.

Based on Address Settings on Country Setup (**Ad and A/R Modules → Setup → Shared Tables Setup → Address Setup**), an address may or may not require State and/or Post Codes

If the address and/or phone number is missing, on the Approve Pending Accounts screen the approving user will be stopped from approving accounts if the address is missing:



This same setting will also apply to manual approval of the account in Name Maintenance and also if user's group security permits the user to approve accounts during campaign entry.

Logo for Receipt

Receipt templates can now be setup to include the logo from the bank.

To Setup:

1. Add the bank's logo to the Advertising invoice logos
 - Navigate to **Setup → System Tables Setup → Invoice Form Logos**
 - Enter ID, Description, and upload file
 - Click + to add to logos and click save.
2. Link the new logo to the bank setup
 - Navigate to **Setup → System Tables Setup → Bank Setup**
 - Select the desired bank
 -

Select the new logo from the logo dropdown

3. Add Bank Logo for #BANK_NAME# (Name of the Bank) in receipt.

Logo will be displayed on the Receipt:

 Credit Stop Report - Credit Rating added

Main Menu
Customers
Invoices
Credit Control
Payments
Statements
Setup
Help
Logout

Credit Control Manager H...
My Collections
List of Payments
Controller Notes / Activity ...
Collection Letters
Cash by Controller Report
Assign Controller to Clients
Add / Remove Clients From...
Clients on Credit Stop

ADD/REMOVE CUSTOMERS FROM CREDIT STOP

Aging Method
Run By Due Date

Client Selection
Only Clients NOT on Credit Stop

Client Types
Local World for All

Credit Controller
31 Days and Older

Only select Balances that are
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

Selection																					
ID	Customer Name	Client Type	Credit Rating	Balance		Not Yet Due		0-30		31-60		61-90		91-120		121+		Cash on Account		Age of Client Invoices (in Days)	Credit Stop
				Y	T	Y	T	Y	T	Y	T	Y	T	Y	T	Y	T	Y	T		
100032	Christ United Methodist Church	Non-Profit Account	concern	1,700	0	0	0	1,700	0	0	0	0	0	0	0	0	0	0	0	34	☐
100034	Sukey Canton	Non-Profit Account		2,880	0	0	0	2,880	0	0	0	0	0	0	0	0	0	0	0	34	☐
100054	Mazda USA	National Account		8,000	2,000	2,000	2,000	2,000	0	0	0	0	0	0	0	0	0	0	0	65	☐
100055	Tesco	National Account		14,976	0	0	0	0	0	0	3,744	11,232	0	0	0	0	0	0	0	752	☐
100057	BMW of North America, LLC	National Account	concern	144,054	39,717	25,143	53,913	25,261	0	0	0	0	0	0	0	0	0	0	0	65	☐
100012	The Gap Inc.	National Account		41,600	12,800	12,800	12,800	3,200	0	0	0	0	0	0	0	0	0	0	0	65	☐
100050	AMC Theatres	National Account		23,145	0	0	23,145	0	0	0	0	0	0	0	0	0	0	0	0	34	☐
100059	BMW UK	National Account		269	0	0	0	0	0	0	0	269	0	0	0	0	0	0	0	127	☐
100112	Gray Worldwide	National Account	Poor	10,404	1,301	1,301	1,301	4,503	0	0	0	0	0	0	0	0	0	0	0	65	☐
100249	St. Mary Medical Center	Non-profit Account		32,400	16,200	7,200	9,000	0	0	0	0	0	0	0	0	0	0	0	0	35	☐
100005	Starbucks	National Account		100,293	0	39,861	22,584	27,888	6,941	0	0	0	0	0	0	0	0	0	0	95	☐
100009	Bayer Diagnostics, Inc	National Account		61,441	28,000	22,400	11,041	0	0	0	0	0	0	0	0	0	0	0	0	33	☐
100156	Ton Horton	National Account	Poor	42,421	20,653	2,984	16,764	0	0	0	0	0	0	0	0	0	0	0	0	35	☐
100126	Telex	National Account		5,352	0	1,336	1,336	1,336	1,336	0	0	0	0	0	0	0	0	0	0	95	☐
100147	H&A INC	National Account		66,800	39,600	17,600	11,600	0	0	0	0	0	0	0	0	0	0	0	0	35	☐
100140	Lindswater World	Local Business		104,762	27,190	35,712	32,566	10,099	346	0	-1,000	0	0	0	0	0	0	0	0	96	☐
100227	Globe Cinemas&ret	National Account	93,697	52,705	23,404	17,568	0	0	0	0	0	0	0	0	0	0	0	0	97	☐	

Do Not Send Statement Option

Statement Details

Delivery Method

Print

Print & Email

Print

Email

Do NOT Send Statement

Company	Name			
Starbucks	Buck Williams			

Starbucks

Select a Contact

New Contact

+

Navigate to **Customers → Advertiser / Agency Maintenance** in the Advertising module or **Customers → Name/Address Maintenance** and then select the A/R Setup node. In the Credit Info section, if the Generate Statements flag is set to yes, then the customer will have a statement generated. In previous releases, the options were to Print, Email, or Print & Email. There is now a 4th option to not send the statement. This will create a separate batch for these, with the delivery method set to Do Not Send. If using an external printing company to print & mail statements, this allows for these statements to be segregated and not sent out for delivery. The statement will still be generated, and will be accessible as needed for manual sending from the customer record.

A/R STATEMENT BATCHES

Invoice Batch Selection Criteria

Select From Date: 12/9/2023
Select To Date: 1/8/2024
Get Batches

Selected Batches

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

Batch No.	Created Date	Created Time	Created By	Type	Companies	Delivery Method	Status	Total Statements	Batch PDF	Labels CSV	Delete
103T	1/8/2024	12:24 PM	Kelly Smith	Trial Run	Naviga (D1)	Email Only	Completed	4			
104T	1/8/2024	12:24 PM	Kelly Smith	Trial Run	Naviga (D1)	Do NOT Send Statement	Completed	1			
105T	1/8/2024	12:24 PM	Kelly Smith	Trial Run	Naviga (D1)	Print Only	Completed	63			

Statement Contacts for Agencies

A request came in to allow different contact people at an agency to receive statements for different advertiser accounts served by that agency. This new feature is only relevant if using the statement parameter to Separate Statements by Advertiser:

Statement Parameters	
Exclude Cash on Account for Pre-Payments	☒ Yes
Exclude Disputed Invoices	☐ No
Exclude Cash on Account if no Invoice Type	☐ No
Suppress Display of Credits	☐ No
Suppress Display of Payment Information	☐ No
Include Service Charges	☒ Yes
Display the Full Pay Amount on Partial Payments	☒ Yes
Consolidate Statements to Parent Company	☐ No
Separate Statements by Company	☒ Yes
Separate Statements by Advertiser	☒ Yes
Balance Forward Suppress Detail	☒ Yes
Sort Option: Bill-to Name	

Print message if balance is between 0-30 days	WE LOVE YOU THANK YOU FOR YOUR BUSINESS
Print message if balance is between 31-60 days	Thank You For Your Business
Print message if balance is between 61-90 days	Thank You For Your Prompt Payment of Past Due Balances!
Print message if balance is between 91-120 days	WATCH YOUR KNEECAPS
Print message if balance is over 120 days	WE KNOW WHERE YOU LIVE

If the above is set to yes, then in Customer Maintenance, on the A/R Setup node of the ADVERTISER record, different contacts can be setup for the different advertiser/agency relationships.

As an example, let's take This BMW Account, which is served by Ogilvy and also by JWT. Below is the BMW Advertiser account:

Statement Details							
Delivery Method		Print					
Company	Name	Title	Phone	Email	Agency Contact		
BMW of North America, LLC	Jeremy Stout			navigademotest3+bmw@gmail.com	☐		
Ogilvy & Mather	Jennifer Jones			Navigaagencydemo@gmail.com	☒		
J. Walter Thompson	Claire Jacobson	Marketing	212 333-4444	navigademotest3+JWT@gmail.com	☒		
BMW of North America, LLC				Select a Contact		New Contact +	

What the above is showing is that any invoices which get billed directly to BMW, then the statement contact will be Jeremy Stout. Any invoices using Ogilvy, the statement will go to Jennifer Jones at Ogilvy and any invoices using JWT will be sent to Claire Jacobson. There is a read-only checkmark which gives the user a visual indicating that it is an agency contact (displayed only after save).

The AGENCY account (Ogilvy), on the A/R Setup node looks like this in our example:

Statement Details

Delivery Method

Print

Company	Name	Title	Phone	Email	Agency Contact		
Ogilvy & Mather	Accounts Payable				☒		

Ogilvy & Mather

Select a Contact

New Contact

+

As mentioned above, agency contacts listed on the advertiser account will only receive a statement for the advertiser when the "Separate Invoices by Advertiser" flag is set on statement preferences. Otherwise a single statement will be sent to the contact person(s) set up on the AGENCY account.

Suppose then I run a batch of statements as follows....

Statements in this Batch						
Statement ID	Customer	Currency	Output	Amount	View PDF	
3900T	BMW of North America, LLC		Print	143,221.43		
3901T	Ogilvy & Mather / Home Depot Corporation		Print	104,720.00		
3902T	Ogilvy & Mather / BMW of North America, LLC		Print	239,252.96		
3903T	Ogilvy & Mather / Walnut Meadows		Print	12,723.50		
3904T	Ogilvy & Mather / Audi UK	Pound	Print	575.08		
				500,492.97		

NAVIGA™ 2023.6

ACCOUNT

YOU ARE LOGGED IN AS

SECURITY GROUP

LANGUAGE

© 2024 NAVIGA

In the example month, there were orders for BMW of North America which were billed directly. These, if I click on the pdf icon, I will see the bill-to as Jeremy as expected:

bill-to

BMW of North America, LLC

ATTN: Jeremy Stout

300 Chestnut Ridge Road

WESTWOOD, NJ 07677

UNITED STATES

The statement for Ogilvy / BMW, if I click on the PDF icon, I see the bill-to as

Jennifer:

bill-to

Ogilvy & Mather
ATTN: Jennifer Jones
320 MADISON AVENUE
NEW YORK, NY 10017
UNITED STATES

And the other three Ogilvy clients from above will be billed to their respective contacts at Ogilvy, which in this case were just the A/P department, because there was not an Agency Contact listed in the statement section on those Advertiser account maintenance screens:

bill-to

Ogilvy & Mather
ATTN: Accounts Payable
320 MADISON AVENUE
NEW YORK, NY 10017
UNITED STATES

If you choose to not set up agency contacts on the Advertiser's A/R Setup, Statement Details section, and/or if you choose to not split statements by Advertisers, then statements will continue to work as they always have with Statements going to the statement contact on the Agency's Customer Maintenance screen.

Statement Contacts used for Collection Letters

In prior releases, the Collection letters would be sent to only the first contact person in the Statement Details section. That has now been changed to send to all Contacts in the Statement Details section. So in this example here where two contact people both get the statement, going forward these same two people will get the Collection letters too.

Statement Details

Delivery Method
Print

Company	Name	Title	Phone	Email	Agency Contact		
Underwater World	Ed Guckin	Manager	215 215-444-5556	uwwdemo@gmail.com	☐		
Underwater World	Tim Macrone	Assistant	215 855-8522	uwwdemo+Tim@gmail.com	☐		

Underwater World
Select a Contact
New Contact
+

Advertiser Portal

Mark Inactive/Delete Profiles

Navigate to **Advertising Module** → **Setup** → **Admin** → **Portal Setup** → **Portal Setup**.
 OR Navigate to **System Settings Module** → **Client Portal Access** → **Portal Setup**.
 Both menus direct user to the same screen.

Two new functions are now available in the Advertiser Portal setup: Inactive flag at the top in Profile Selection section & delete button at the bottom of the screen.

For any profile that you no longer wish to use you may mark it as inactive:

CLIENT PORTAL SETUP

Profile Selection

PROFILE SELECTION
The Client Portal system can be run under one or more profiles. A profile is a setup of rules that can represent different websites or properties. For instance, if you have Website A and Website B, and want to offer a different Self-Service portal for each, you could create a Profile A and B.

1

PROFILE ID
SH

Create a New Profile

2

PROFILE DESCRIPTION
SH - Shirley
<https://dev.navigahub.com/portal/client/digital2023.5/sh>

3

PRODUCT GROUP FILTER
Nature Pubs and Digital (NATS)
This option will filter Orders, Invoices, Specials etc to only display those in the selected product group(s) set here. This will be used in the order proposal link to determine the logo and profile used in the URL.

4

COMPANY
This option will filter Orders, Invoices, Specials etc to only display those in the selected Company set here. In some cases Company is derived from the Company selection on the Product Group (for instance for Campaigns and Packages). In other cases the Company is derived from the form generation process, for example A/R Statements, or the invoice data, e.g. Misc. Invoices.

5

INACTIVE
☒ Yes

An inactive profile can be reactivated by deselecting the flag and saving the setup.

If the Profile perhaps was created in error, or you are certain you no longer wish to use it, the profile can also be deleted by scrolling to the bottom of the page and clicking delete:

HTML  Preview

Reset

Delete

Save

A deleted profile will be gone for good, so be certain that you no longer need it before deleting it.



A couple years ago, we introduced the idea of a Customer Enhancement Portal, where you all get to add feature requests, look at feature requests submitted by

others, add comments, and vote on things you would like to see us implement in the system. Items that were voted up in the Enhancement Portal will have this check mark next to the feature in the release guide. **In 2023 alone, over 60 items from the Enhancement Portal were implemented in Naviga Ad. Keep those ideas coming and be sure to vote up good ideas from others!**



Click on the Video Icon in the heading to be directed to the release video page. Topics that were included in the release video will display this icon. Use Ctrl-click (Cmd-click on mac) to open in a new tab and not lose your place in the release guide.



NavigaYou In 2023 we introduced a new learning subscription program called NavigaYou. Part of that program are some custom development hours. Any new features that were part of someone's NavigaYou will be highlighted as such with this icon. See [WEBINAR](#) for more info on NavigaYou