

Naviga Ad Release Guide 2024.1

This document provides instructions for how to use the new features in the 2024.1 release, released March 2nd, 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 2024.1 from a version PRIOR TO 2023.5: beginning with version 2023.5, we are supporting ACH and additional payment options through our NavigaPay gateway (for some processors). 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 from releases prior to 2023.5. If this happens to you, try going to Setup → System Tables Setup → Bank Setup and just select the bank and resave it.
- There is a big change to the rep structure (described below) which required a data conversion. It would be a good idea to check over your rep assignments in test prior to upgrading prod, just to make sure everything looks right.
- If you are using the Campaign Manager field on the campaign header, you might want to check out the new Group Security related to this field to see if it might be useful to you.

Advertising Module

Change to Rep Structure

There was a fairly significant change to Brand Reps in that you can now schedule rep changes in advance. In prior releases, a change to sales rep on Brand Maintenance would take place immediately and it was recommended that changes to rep structure be made on the day it was to take effect (could be imported if many accounts were changed). Now, the change can be made in advance and set to take effect as of a certain date. This change will require a data conversion, which will run during the upgrade process.

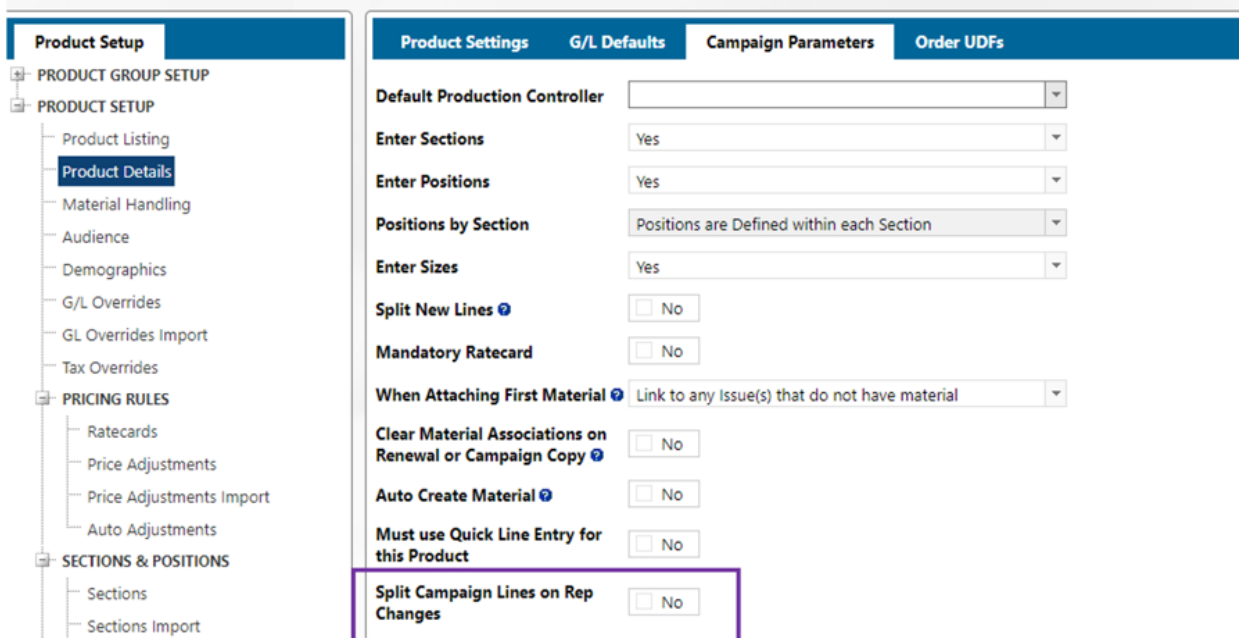
For orders that are already booked, if a rep is changed and the user making the change says "yes" to update currently running orders, the order may automatically split into multiple lines. Suppose for example, an order is running from Jan 1 to June 30 and Sales Rep A is getting credit for having sold that line. If a rep change is created and a new rep is due to take over the account as of March 1, then the order line will be split into two lines - with the first line running until the end of February and the new line starting March 1 and running until June 30.

Due to feedback from users on the line splitting, we have added an option on the product as to whether or not the line will split. (effective with patches after April 8th). For Print products it is generally acceptable and desirable to split the line - but for anything going to GAM it may not be desirable to split the lines as it will make reconciliation difficult.

For lines which don't split, the system will behave as it used to - where the rep on the line will be changed - and anything that was already billed will belong to the prior rep and anything that hasn't yet been billed will change to the new rep. So do be aware of this when making rep changes that you may want to do billing prior to making a change if you are not splitting lines, and you may not want to set the rep change for a date too far into the future.

The default behavior will be to NOT split the lines - for any products you wish to split lines for, please visit Product Setup

PRODUCT DETAIL



Product Setup	Product Settings	G/L Defaults	Campaign Parameters	Order UDFs
PRODUCT GROUP SETUP	Default Production Controller			
PRODUCT SETUP	Enter Sections	Yes		
Product Listing	Enter Positions	Yes		
Product Details	Positions by Section	Positions are Defined within each Section		
Material Handling	Enter Sizes	Yes		
Audience	Split New Lines	☐ No		
Demographics	Mandatory Ratecard	☐ No		
G/L Overrides	When Attaching First Material	Link to any Issue(s) that do not have material		
GL Overrides Import	Clear Material Associations on Renewal or Campaign Copy	☐ No		
Tax Overrides	Auto Create Material	☐ No		
PRICING RULES	Must use Quick Line Entry for this Product	☐ No		
Ratecards	Split Campaign Lines on Rep Changes	☐ No		
Price Adjustments				
Price Adjustments Import				
Auto Adjustments				
SECTIONS & POSITIONS				
Sections				
Sections Import				

Similarly, if someone schedules a new order after the above change has been entered, and the order will start in February and run until the end of March, upon save of that new line, the order will auto-split, because the system already knows that as of March 1, another sales rep will be taking over.

Navigate to **Customers -> Brands -> Brand Maintenance** and then select Rep Assignments on the left navigation. You will notice there is a column now for effective date, and also a flag in the last column to let the user know that there are future rep assignments for this brand, which they will be able to see if they click the pencil icon to edit.

Campaign Sales Reps

This is where you assign Sales Reps to the Brand. Sales Reps may be assigned by Product Group.

Advertiser ID: 255128
Advertiser Name: Undewater World
Brand ID: JXX
Brand Name: Undewater World

Default Sales Rep Assignments for this Brand

This is your default rep assignment used when entering a new order for this Brand.

Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Has Future Assignments
Friday, January 19, 2024	Kelly Smith 100.00				☐

Sales Rep Overrides by Product Group

This is the rep assignment override by Product Group for this Brand.

Product Group	Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Has Future Assignments
Star Group	Friday, January 19, 2024	Kelly Smith 100.00				☐
Personal Finance	Friday, January 19, 2024	Kelly Smith 100.00				☐

Add a New Product Group Override

Add

Sales Rep Overrides by Product

This is the rep assignment override by Product, used when creating new line items where you want to assign specific override reps by product.

Product	Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Has Future Assignments
-- No Records Returned --						

Add a New Product Override

Add

When the edit icon is clicked, this rep assignment window opens:

ADD/EDIT REP ASSIGNMENT

Default Rep Assignment

All Product Groups - Default Reps

Past and Current Assignments

Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On
Friday, January 19, 2024	Kelly Smith 100.00 %				Friday, January 19, 2024 7:08 PM Conversion

Add a New Assignment

Effective Date: Tuesday, February 6, 2024

Assign in Order Entry: ☐ No

Sales Rep 1: Percent:

Sales Rep 2: Percent:

Sales Rep 3: Percent:

Sales Rep 4: Percent:

Cancel Add

In the top section, the "Past and Current Assignments," you will notice that there is no longer a separate "history" area for the historical information as all rep assignments will be shown together, with the most current at the top.



If the account has never changed hands before, then the "effective date" will be set to the date of the conversion:

ADD/EDIT REP ASSIGNMENT						
Default Rep Assignment						
All Product Groups - Default Reps						
Past and Current Assignments						
Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On	
Friday, January 19, 2024	Kelly Smith 100.00 %				Friday, January 19, 2024 7:08 PM Conversion	

If the rep has changed in the past, then the date will reflect the account history:

ADD/EDIT REP ASSIGNMENT						
Default Rep Assignment						
All Product Groups - Default Reps						
Past and Current Assignments						
Effective Date	Rep. 1	Rep. 2	Rep. 3	Rep. 4	Entered On	
Tuesday, October 29, 2019	Wayne Burrows 75.00 %	Kelly Smith 25.00 %			Friday, January 19, 2024 7:08 PM Kelly Smith	
Tuesday, October 29, 2019	Wayne Burrows 100.00 %				Tuesday, October 29, 2019 7:08 PM Kelly Smith	

When I processed invoices for January after the conversion, in the highlighted scenario above, the Kelly Smith user DID still get commission credit for the December and Early January invoices, so it doesn't mean that they weren't the rep earlier than that, it just means that during the conversion, it was the first time that an effective date was captured for that account.

Note on the report, Brand Assignment by Rep:

Rep Assignments							
Drag a column header and drop it here to group by that column							
Advertiser ID	Advertiser	Brand ID	Brand	Assignment Type	Product / Group	Last Campaign Ending Date	Split
100163	Speedy Printing Co	A1	Kellogg Dr Location	Group	Customer Demo	7/10/2022	50.00%
100105	Kelwick Theatre	XX	Kelwick Theatre	Group	Handle Product Group		50.00%
100001	Essex Model	XX	Essex Model	Brand Default	Brand Default		100.00%
100005	Starbucks	XX	Starbucks (brand)	Brand Default	Brand Default	12/27/2024	75.00%
100007	Frito Lay Inc.	XX	Frito Lay Inc.	Brand Default	Brand Default	12/31/2019	100.00%
100008	Glass Smith Kline	XX	Glass Smith Kline	Brand Default	Brand Default	12/31/2021	100.00%
100009	Bayer Diagnostics, Inc.	XX	Bayer Diagnostics, Inc.	Brand Default	Brand Default	12/27/2024	50.00%
100012	The Gap Inc.	A1	Athleta	Brand Default	Brand Default	12/27/2024	100.00%
100012	The Gap Inc.	A3	Banana Republic	Brand Default	Brand Default		100.00%
100020	Ford Automotive Corporation	XX	Ford Automotive Corporation	Brand Default	Brand Default	12/31/2019	100.00%
100021	Fidelity Investments	XX	Fidelity Investments	Brand Default	Brand Default	1/6/2024	100.00%
100027	IBM Corporation	XX	IBM Corporation	Brand Default	Brand Default	12/31/2019	100.00%
100031	Hilton Hotels	XX	Hilton Hotels	Brand Default	Brand Default	6/26/2020	100.00%
100038	Johnson & Johnson	A2	National Division	Brand Default	Brand Default		100.00%
100038	Johnson & Johnson	XX	Johnson & Johnson	Brand Default	Brand Default	12/31/2019	100.00%
100038	Kentucky Mining Consortium	XX	Kentucky Mining Consortium	Brand Default	Brand Default	12/31/2019	100.00%
100041	Mammoth International, Inc.	XX	Mammoth International, Inc.	Brand Default	Brand Default	6/7/2023	50.00%
100042	General Motors USA	XX	General Motors USA	Brand Default	Brand Default	12/31/2019	100.00%
100061	Langford Estates	XX	Langford Estates	Brand Default	Brand Default	12/31/2019	100.00%
100071	Google	XX	Google	Brand Default	Brand Default	12/31/2019	100.00%
100075	Posters Traditional Foods Ltd.	XX	Posters Traditional Foods Ltd.	Brand Default	Brand Default	12/31/2019	100.00%
100130	Hawaiian Airlines	XX	Hawaiian Airlines	Brand Default	Brand Default	12/31/2019	100.00%
100138	Ten Houtens	XX	Ten Houtens	Brand Default	Brand Default	12/31/2024	50.00%
100188	Ac-His - Oak Moore	XX	Ac-His - Oak Moore	Brand Default	Brand Default		50.00%
100335	Kelwick Theatre	XX	Kelwick Theatre	Brand Default	Brand Default	4/1/2023	50.00%

FUTURE assignments will display in the list, but the last campaign date will be blank. In the future we will add a column for effective date so that it will be obvious that they are not the rep yet.

Metadata Surcharges in Quick Line Entry

For classified display ads where metadata is used to trigger surcharges on a campaign, these surcharges can now be added to line items when saving the Quick Line Entry screen to create the line items.

To add the surcharges the user would first put the product(s) and dates onto the Lines tab in Quick Line Entry as shown in the simple example below:

The screenshot shows the 'QUICK LINE ENTRY' interface. At the top, there are fields for 'Select a Package' (with a note '[this will first clear the grid]'), 'Or Copy from Campaign' (with a note 'this will first clear the grid'), 'Package Display Name', 'or Select a Product' (set to 'The Star Website 1 (DEMO1)'), '→ and an Ad Type' (set to 'CLS Online Flat Fee'), and '→ And a Rateline' (set to 'Classified Online' with a note '[this will add a line to the top of the grid]').

Below these fields is a table with tabs 'Lines', 'Category MetaData', and 'Notes'. The 'Lines' tab is active, showing a table with columns: Delete, Product, Ratecard / Edition, Ratecard Line / Description, Section / Position, Start/End, Ad Type, Qty, Rate, and Price. A single line item is listed: 'The Star Website 1 DEMO1' with Ratecard Edition '140', Ratecard Line '1015', Description 'Classified Online', Start/End dates '2/4/2024' and '2/29/2024', Ad Type 'ONL', Qty '1', Rate '20.00', and Price '20.00'. There are also links for 'Ad Server Override Description' and 'VIEW PRODUCT INFORMATION'. To the right of the table, there are fields for 'Default Pricing Contract', 'Discount Percent' (0.00000 %), and 'of Net'.

Note the price for this is a flat \$20 for this line item

Then click on the "Category Metadata" tab and select the category tree and category, and fill in any needed metadata questions. THEN, click the Apply Adjustments button at the top, to add any adjustments to the line:

The screenshot shows the 'QUICK LINE ENTRY' interface with the 'Category MetaData' tab selected. At the top, the same selection fields as the previous screenshot are visible. Below the tabs, there are fields for 'Category Tree' (set to 'Employment') and 'Category' (set to 'Employment → Full Time Help'). To the right of these is a button labeled 'Apply Adjustment(s)', which is highlighted by a purple arrow.

Below these fields is a table with columns: Field, Value, and Required. The table contains several rows of metadata questions:

- Salary Range: Employment (Required)
- Salary Type: Employment (Required)
- Benefits: Employment (Required)
- Company Logo: Employment (Required) - Includes a placeholder image and links: Download, Select, Remove
- Background Color: Employment (Required)
- Text Color: Employment (Required)
- Send to Recruitology: Employment (Required) - Value: Yes
- Recruitology.com Listing Type: Employment (Required) - Value: Standard
- OwnLocal: Employment (Required) - Value: Yes
- Start Date: Employment (Required)

At the bottom of the screen, there are three buttons: 'View Package Inventory', 'Cancel', and 'Check Line Inventory'. A 'Create Lines' button is also visible on the right side of the bottom bar.

The user can then click Create Lines from this screen, or toggle back to the "Lines" tab and confirm that the metadata charges were added:

QUICK LINE ENTRY

Select a Package [this will first clear the grid]

Or Copy from Campaign [this will first clear the grid]

Package Display Name

or Select a Product The Star Website 1 (DEMO1)

→ and an Ad Type CLS Online Flat Fee

→ And a Rateline [this will add a line to the top of the grid] Classified Online

Lines	Category MetaData	Notes							
Delete All Lines	Book All Issues	Default Pricing Contract Discount Percent 0.00000 % of Net							
Delete	Product	Ratecard / Edition	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
	The Star Website 1 DEMO1	140	1015 Classified Online		2/4/2024 2/29/2024	ONL	1	120.00	120.00
Ad Server Override Description VIEW PRODUCT INFORMATION									

Override Campaign Price (Net)

In 2023.5, we introduced the concept of Overriding the Campaign price by clicking on the Gross Amount link on the campaign lines screen and typing in the price. The system would then determine how much discount to apply to each line. Agency commission would be calculated after that bottom line override of the gross price. For some of our magazine clients who work almost exclusively with agencies, all their quoting and negotiation is done at the net price, so it was cumbersome to have the reps then calculate the gross price to put the override amount into the system. So, now we support both Gross and Net price overrides.

User can click the Net amount override at the top of the screen:

CAMPAIGN LINES

Campaign Explorer

- Campaign
- Campaign Setup
- Line Items**
- Optimize Digital Lines
- Material Management
- Campaign Budget
- Campaign Custom Data Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts

Campaign Lines

Campaign ID 1999

Advertiser Home Depot Corporation

Client Type National Account (NAT)

Brand Home Depot Corporation

Agency Ogilvy & Mather

Status Q1 - Proposal

Incentives Status **4 Available**

Adcellerant Proposal ID

Adcellerant Budget 0.00

Start Date 3/1/2024

End Date 3/31/2024

Gross Amount 26,050.00

Commission Amount 3,907.50

Net Amount 22,142.50

Estimated Tax 0.00

Estimated Total 22,142.50

Currency Local Currency

Or they can select one or multiple lines at the bottom of the screen and select Price Change - Bottom Line Override from the line items options dropdown:



Advertising Orders														
Check Incentives		Selected Line(s) Options		Numbers in the Grid										
		Split Selected Lines Delete Selected Lines Update GAM Targeting		Display Estimated Net Amounts										
ID			Description	Copy	Ad Type	Start Date	End Date	Mar 2024						Total
6412	Package ID: 1	The Navigator Website Package: Navigator Gold Package Size: Square Top up (300 x 300), Skyscraper (120 x 600), Square Button (125 x 125) Section: ALL Position: TOP	Open CPM Rate		CPM	3/1/2024	3/31/2024	553						553
6413	Package ID: 1	The Navigator Times Package: Navigator Gold Package Size: 4x6 Section: Main Position: ROS Color: Full Color-CMYK (4C)	Color Display - Column inch		PCOL	3/1/2024	3/1/2024	2,040						2,040
6414	Package ID: 1	Navigator Magazine Package: Navigator Gold Package Size: 1/2 Page (H) (Mag) (7.375 x 4.875) Section: ALL Position: RWD Color: Full Color-CMYK (4C)	1/2 Page (H) (Mag)		PMOD	3/1/2024	3/1/2024	6,800						6,800
6415	Package ID: 1	Navigator Magazine Package: Navigator Gold Package Size: Full Page (Mag) (7.375 x 9.75) Section: ALL Position: ROS Color: Full Color-CMYK (4C)	Full Page (Mag)		PMOD	3/1/2024	3/1/2024	11,050						11,050
6416	Package ID: 1	Navigator E-Newsletter Package: Navigator Gold Package Size: LeaderBoard (728 x 90) Section: ALL Position: TOP	LeaderBoard		CPD	3/12/2024	3/12/2024	1,700						1,700
								22,143						22,143

In either case, the screen will open up and the user will be able to override the gross or net price. if the user clicked on the Gross Price link at the top, the override type will default to gross, if the user picked the Net Price link at the top, the override type will default to net. If the user selected multiple lines at the bottom and chose Bottom Line Override from there, the default will be gross, but the user can manually select net from the override type dropdown (shown below)

CAMPAIGN PRICE OVERRIDE

Current Gross Total

26,050.00

Current Net Total

22,142.50

Override Type

Gross

New Total

26,050.00

Run Calculation

Line Items						
Line ID	Product	Ad Type	Line Type	Original Gross	New Gross Adjustment Amount	New Gross Total
6412	The Navigator Website NAV1	Cost Per Thousand CPM	CPM	650.00	0.00	650.00
6413	The Navigator Times NAV13	Print Display, Col x In PCOL	CPCI	2,400.00	0.00	2,400.00
6414	Navigator Magazine NAV12	Print Display, Modular PMOD	FF	8,000.00	0.00	8,000.00
6415	Navigator Magazine NAV12	Print Display, Modular PMOD	FF	13,000.00	0.00	13,000.00
6416	Navigator E-Newsletter NAV6	Cost Per Day Sponsorship CPD	CPD	2,000.00	0.00	2,000.00
				26,050.00	0.00	26,050.00

Close

Save

Adjustments will be proportionately created for each line item. If there are any existing bottom line overrides on the order already, it will automatically be removed and added back with the new price. You can only have one bottom line override on an order line.

Just like we noted with the gross amount override, occasionally, there will be rounding differences, especially if multiple issues are on a line or multiple lines on a campaign, where the bottom line might be a few pennies off from the desired total. The reason this happens is due to the fact that we cannot bill someone for fractions of a penny, so each issue must come out to a whole penny. If there are multiple issues on a single line, with each issue rounding to a whole penny, there could be rounding differences. When that happens, user can manually split the line to have one issue date on a line by itself and then adjust the bottom line on just that line to resolve.

GAM Bulk Edits on Campaign

A new node has been added to Campaigns called "Optimize Digital Lines." Select this node to be able to quickly make these changes, without opening up each line individually:

- Start/End Dates (once it has started, only end date can be edited),
- delivery priorities,
- override qty,
- description (until Invoicing has started)

Campaign

Campaign Setup

Line Items

Optimize Digital Lines

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

History of Changes

Go to CRM View

Go to Advertiser View

Agency

Status

Confirmed

Commission Amount

0.00

Net Amount

24,675.00

Est. Tax

0.00

Currency

Local Currency

Digital Lines

Bulk Update GAM Targeting

View Serving Detail

Line ID	External ID	Product Ad Type GAM Line Type	Line Description	Start Date End Date	Delivery Priority	Estimate Qty Override Qty	Served to Date
☐ 6381	6547341530	Lavender Website CPM STANDARD	Billboard CPM line	2/13/2024 2/29/2024	None Evenly	5,313	Ad Server Qty 0 3rd Party Qty 0 4th Party Qty 0 Actual Qty 0
☐ 6382	6546580030	Lavender Website CPM STANDARD	Billboard CPM line	3/1/2024 3/31/2024	None Evenly	9,687	Ad Server Qty 0 3rd Party Qty 0 4th Party Qty 0 Actual Qty 0
☐ 6383	6547341575	Gardening Mag Website CPM STANDARD	Targeted CPM Rate	2/13/2024 3/31/2024	8 (Normal) Evenly	35,000	Ad Server Qty 0 3rd Party Qty 0 4th Party Qty 0 Actual Qty 0
☐ 6385		Naviga Native FLAT	Native Silver Package	2/13/2024 3/31/2024		1	Ad Server Qty 0 3rd Party Qty 0 4th Party Qty 0 Actual Qty 0
						50,001	0

Two additional functions available on this screen are not new, and are available elsewhere, but have been added for user convenience - the [Bulk Update GAM Targeting](#) and the [View Serving Detail](#). These have been in the system for a while, so I won't go into detail on the functions here, but I have added links to where additional documentation can be found in case you haven't used these functions before.

Better Support for changing Agency Commission Amounts

In prior versions, the campaign and reports did not properly reflect agency commission amounts when there was a change to commission percentage after the campaign starts billing. Probably not something that is done frequently, so many of you probably didn't notice, but the new commission amount was reflected in the report for all campaign insertions, even

those which already billed. It didn't affect actual posted revenue or receivables on the lines that were already billed, but the campaign and several sales reports were not accurately reflecting what had been billed. Here is an example campaign with the lines split out by issue date to make it easier to visualize. The first line was already invoiced when the agency commission changed from 15% to 25%. In prior releases all lines would have displayed the \$1,979.44 amount, which was not correct. We now store the commission on each line rather than calculating it on the fly so that we can properly display when commission changes.

Line Details

Applied Incentives

Tickets

Booking Wizard

Quick Line Entry

Select a Product
Select an Ad Type

Full Line Entry

Send a Confirmation

Prod. Schedule

Audience Planner

Audience Reach

Advertising Orders

Check Incentives

Selected Line(s) Options

Numbers in the Grid
Display Estimated Net Amounts

	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Mar 2024	---	---	---	---	---	Total	Ratecard Price Variance %
☐	40248	The Star QA Daily Newspaper Size: 1/2 Pg Hor BS (12.625 x 8.175) Section: LIFE Position: LIFEPOS Color: Full color (4C)	1/2 Page		NR	3/5/2024	3/5/2024	2,243.36	---	---	---	---	---	2,243.36	-42.63%
☐	→ 40255 Split from: 40248→40255	The Star QA Daily Newspaper Size: 1/2 Pg Hor BS (12.625 x 8.175) Section: LIFE Position: LIFEPOS Color: Full color (4C)	1/2 Page		NR	3/12/2024	3/12/2024	1,979.44	---	---	---	---	---	1,979.44	-42.63%
☐	→ 40256 Split from: 40248→40255→40256	The Star QA Daily Newspaper Size: 1/2 Pg Hor BS (12.625 x 8.175) Section: LIFE Position: LIFEPOS Color: Full color (4C)	1/2 Page		NR	3/19/2024	3/19/2024	1,979.44	---	---	---	---	---	1,979.44	-42.63%
☐	→ 40257 Split from: 40248→40255→40256→40257	The Star QA Daily Newspaper Size: 1/2 Pg Hor BS (12.625 x 8.175) Section: LIFE Position: LIFEPOS Color: Full color (4C)	1/2 Page		NR	3/26/2024	3/26/2024	1,979.44	---	---	---	---	---	1,979.44	-42.63%
								8,181.68					8,181.68		

Product Group Multi-Select in Billing

On the Prepare Performance Billing, Prepare Flexible Billing, and Missing Campaign Actuals screens, in prior versions, there was a single-select dropdown field for the Product Group. That has now been changed to a multi-select with a filter at the top to type and filter the results. This allows the user to filter on product group, but be able to process multiple groups in the same batch, thus saving considerable time for sites which have a large number of product groups.

PERFORMANCE CAMPAIGNS MISSING ACTUALS

Campaign Billing

- Prepare Performance Billing
- Prepare Flexible Billing
- Generate Invoice(s)
- Print Invoice(s)
- Generate Order Data File
- Download Order Data Files
- Regenerate Invoice(s)
- Reverse Campaign Invoicing

Campaigns with Problems

- Billing Schedule Issues
- Credit Issues
- Missing Actuals
- Credit Card Issues
- Campaigns Awaiting Credits

Campaign Selection Criteria

Product Group

Type here to filter/search

- ☐ Bauer Media Entertainment (01)
- ☐ My Shows (2012)
- ☐ Bauer Media Practical (83GD)
- ☐ AA Show (AA)
- ☐ ANNAS REPORTING ONLY (ANNAS)
- ☐ ALL SHOWS - AS (AS)
- ☐ Bauer Cars (AUTO)
- ☐ Auto Week Group (AW)
- ☐ Bauer Media Retail Group (R)
- ☐ Crain Pulse (CRAIN)
- ☐ Star Group (DEMO)
- ☐ Mining (ENT)
- ☒ Food Online (FO)
- ☐ FOS Text (FOS)

From Date

Ending From

Through Date

Ending By

Get Campaigns

Campaign	Line ID	Product	Line Start	Line End	Line Type	Currency	Rate	Est. Qty	Est. Amount	Use 3rd Party Actuals	Qty Served	Clicks Served	Run of Network
--- No Records ---													

Group Security Change - Product Security

In Product Security, there is now a new setting to Apply Product Group Security to Campaign Managers.



PRODUCT GROUPS NOT-ALLOWED

Search

PRODUCT GROUPS ALLOWED

- All Events
- Customer Demo
- Magazine Brands - Outdoor
- National Products
- Naviga Product Group
- Newsletters
- Plan Demo Product

2 APPLY PRODUCT GROUP SECURITY TO CLIENT INQUIRY, AND WHEN SELECTING CASH ON ACCOUNT TO APPLY TO A CAMPAIGN

☐ No

3 APPLY PRODUCT GROUP SECURITY TO CAMPAIGN MANAGERS

☒ Yes

When this flag is set to yes, for this security group, the system will filter the Campaign Managers on the Campaign Manager dropdown to only be campaign managers who have access to the Product Group for the Campaign.

Excel Download on Reports

Several reports got a makeover on the excel download option. North American clients might not notice much of a difference, but for our international clients with different number formatting, this will be a welcome update. This is the list of reports which were affected:

- 12 Period Analysis
- Campaign Billing Email Report
- Campaign Performance
- Campaigns with Billing Schedule Issues
- Issue-based Product Analysis
- My current campaign delivery
- New / Lost Advertisers
- Orders by Entry Date
- Orders by Period
- Orders by Product
- Orders by Sales Rep by Year
- Product Group Analysis
- Rep Pipeline by Product Group
- Rep Pipeline by Product
- Rep. Summary
- Sales Activity Report
- Sales by Territory Summary

New Filter on Reconcile Digital Actuals

Users will now find an additional filter at the top of the Reconcile Campaign Actuals report for filtering by "reconcile to" options. This is a multi-select field so you can select more than one, and leaving blank will include all.



RECONCILE CAMPAIGN ACTUALS

Campaign Type: Performance | Product Group: Naviga Product Group (NAVIGA) | Group Selection: Use Group on Call | Line Types: Cost Per Thousand, Cc

Reconcile to: ☒ Ad Server
☐ Ad Server Viewable
☐ Estimate
☐ 3rd Party

Specific Campaign ID: | From Date: 9/1/2020 | Through Date: 1/31/2024 | Exclude Lines w/ Actuals: Yes | Exclude Lines w/o External ID: No | Ignore Line Overrides: No | Get Campaigns

Selected Campaigns

Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server City Served	Ad Server Viewable Qty Served	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks	Actual Amount	Run of Network	Apply
1809	5845.6	BMW of North America, LLC Local Dealership	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/19/2024	CPM	Ad Server	Capped at Individual Monthly Goals	13.00000	2,744	66.74	92,508	16,970	1,088	0	0	0	0	0	0	0.00		
1861	5955.3	Centina Rado	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/31/2024	CPM	Ad Server	No Caps	10.00000	4,511	45.11	3,968	542	39	0	0	0	0	0	0	0.00		
1866	5970.3	BMW of North America, LLC 3-Series	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/31/2024	CPM	Estimate	No Caps	13.00000	12,704	165.15	22,806	3,238	308	0	0	0	0	0	0	0.00		
1876	6005.1	B&H Photo	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/31/2024	CPM	Ad Server	No Caps	12.00000	12,705	152.46	0	0	0	0	0	0	0	0	0	0.00		
1890	6066.2	BMW of North America, LLC 5 Series	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/31/2024	CPM	Ad Server	No Caps	7.65000	37,404	286.14	34,203	5,741	516	0	0	0	0	0	0	0.00		
1891	6072.2	BMW of North America, LLC Local	The Navigator Website (NAV1)	Open CPM Rate	1/1/2024	1/31/2024	CPM	Ad Server	Capped at Individual Monthly Goals	13.00000	4,256	55.37	0	0	0	0	0	0	0	0	0	0.00		

New fields on Product Group

In a prior release, these fields were added to company setup for use on statements. Now, the following new fields were also added to Product Group setup and also to the Merge tags, for Advertising Invoices.

PRICING RULES
 Group Ratecards
 Price Adjustments
 Auto Adjustments

PRODUCT SETUP

Derive G/L Codes from: Use Values on Product, but A/R Code on the Group

Invoicing

Invoice Prefix:

Credit Prefix:

Override Invoice Email from Address: billing@navigaglobal.com

Remit-To Name:

Remit-To Address: 7900 International Drive
Suite 800
Bloomington, MN 55425 USA

Remit-To Phone:

Remit-To Email:

Remit-To Customer Service Email:

Remit-To Address 1:

Remit-To Address 2:

Remit-To Address 3:

Remit-To City:

Remit-To State:

Remit-To Zip:

Remit-To Country:

Tax ID:

Performance Invoice Form: EN_Performance Campaign Invoice

Flexible Invoice Form: EN_Flexible Campaign Invoice

Default GAM Override % on Ad Type

On the Ad Type setup, you can now set a default Override % which will multiply the Impressions on the campaign by this % to set the "Ad Server Override Qty" on the Google Ad Manager Tab. Ad an example, I wanted to send google 5% HIGHER quantity than whatever the



customer ordered to ensure that I always slightly exceeded expectations. So I set the Override Percent to 105%. Then when I booked an order for 50,000 impressions, what went to google was 52,500.

AD TYPE SETTINGS

Ad Type ID CPM	Default Material Approval Status [Dropdown]	Send to Naviga Plan ☐ No	Listing Entry ☐ No
Ad Type Description Cost Per Thousand	Ad Serving Platform [Dropdown]	Discounts not Allowed ☐ No	Enforce Contiguous Days ☐ No
G/L Type Website Advertising (DIG)	Google Ad Manager Cost Type Cost Per Thousand	Require Category Selection in Full Line Entry ☐ No	No Agency Commission ☐ No
Line Type Cost Per Thousand	Google Ad Manager Line Type Standard	Ignore Required Metadata Field Rules in Full Line Entry ☐ No	No Rep Commission ☐ No
	Default Override Qty Percent 105.00		Is for Preprints ☐ No

Here is my order:

NEW COST PER THOUSAND LINE

Pricing	Other	Google Ad Manager	Expected Sizes	Creatives	Custom Fields	Production Notes	Category MetaData	Sales Rep(s)
Product	The Navigator Website	Section	[Dropdown]	Ratecard CPM Rate	15.00000			
Ad Type	Cost Per Thousand	Position	Right Rail	Adjustments	0.00000			
Contract	[Dropdown]	G/L Type	Website Advertising	Discount Rate	15.00000			
Ratecard	Open Rates	Material Status	[Dropdown]	Estimated Impressions	50,000			
Ratecard Line ID	1238			Estimated Amount	750.00			
Description	Digital Product with Excludes Galore			Estimated Tax	0.00			
				Estimated Total	750.00			

and the GAM Tab:

NEW COST PER THOUSAND LINE

Pricing	Other	Google Ad Manager	Expected Sizes	Creatives	Custom Fields	Production Notes	Category MetaData	Sales Rep(s)
Targeting Preset	[Dropdown]	Line Description	Override Description for Ad Server	Creative Type	Standard	Ad Server Override Qty	52,500	
Template (Deprecated)	[Dropdown]	Delivery Priority	None Deliver Evenly	Max Duration (in seconds)	0	Maximum Impressions	[Input]	
Google Line Status	[Dropdown]	Target Platform	[Dropdown]	Display Creatives (Roadblocking Type)	One or more	Allow Same Advertiser Exception	☐ No	
Google Line ID	[View in GAM] [API]	Line Type	STANDARD	Rotate Creatives	Evenly			
		Cost Type	CPM					

Note for Quick Line Entry Users: There is also a quantity override on the GAM tab on Ratecard line setup. When booking by Quick Line Entry, the Ratecard line setup will override the ad type default. In Full line entry, the Ratecard setup will only be used if there is no Ad Type default. So, slightly different behavior to be aware of, though we believe it is unlikely that sites will use both the ad type override and the override on the rate line.

APPEND Ratecard lines to existing Ratecard through import

In Previous releases, if a ratecard ID already existed, you could not re-import any lines onto that Ratecard. That has now been changed. **You still CANNOT update existing ratecard lines**, but you can add new rate lines to an existing ratecard ID.

Take this example as a possible use case for this feature:

39

New

Ratecard Description

Retail Open Rates

Add / Edit Clients

Default Frequency Rate Discount Schedule

Commercial Rate Breaks

Preview Frequency Discount Schedule

Apply Frequency Discounts without Contract

Yes

Edition

Only Allow this Ratecard on Packages

No

New Line

View Change History

Create from Size Table

Copy lines from another ratecard

Apply Sort

Sort by Description

Page: 1 of 1

Go

Page size: 20

Change

Item 1 to 20 of 20

Sort	ID	Size	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns or Width	Inches or Centimeters or Apple Lines	Production Link	External ID	Rate	Inactive	No Tax	
1	1242			Main News B&W Col CM	No		A-News Section	Run of Section	Cost Per Sq. CM	Print Display		0.00	0.000			75.00000	No	No	View Line Change History
2	1241		Full Color-CMYK	Main News 4C Col CM	No		A-News Section	Run of Section	Cost Per Sq. CM	Print Display		0.00	0.000			100.00000	No	No	View Line Change History
3	1219	9.83x1.5 (Front Page Banner)		Front Page Banner	No	30,000			Print Display, Modular	Print Display		0.00	0.000			6,000.00000	No	No	View Line Change History
4	254	9.83x21 (Full Page (BS))		Full Page B&W	No	420,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		6,000.00000	No	No	View Line Change History
5	255	20.66x21 (Spread (BS))		Spread B&W	No	840,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		12,000.00000	No	No	View Line Change History
6	256	4.832x10.5 (1/4 Page (BS))		1/4 Page B&W	No	105,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		1,500.00000	No	No	View Line Change History
7	257	9.83x10.5 (1/2 Page (BS))		1/2 Page B&W	No	210,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		2,000.00000	No	No	View Line Change History
8	258	9.83x21 (Full Page (BS))	Full Color-CMYK	Full Page 4C	No	420,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		8,000.00000	No	No	View Line Change History
9	259	20.66x21 (Spread (BS))	Full Color-CMYK	Spread 4C	No	840,000			Print Display, Modular	Print Display		0.00	0.000	Naviga Print News Specs (PR)		16,000.00000	No	No	View Line Change History
10	260	4.832x10.5 (1/4 Page)	Full Color-	1/4 Page 4C	No	105,000			Print Display,	Print Display		0.00	0.000	Naviga Print News		2,000.00000	No	No	View Line

I have Ratecard ID #39, which has several modular sizes, but I didn't previously offer a 1/8th page rate. Perhaps I want to start allowing for a 1/8 Page B&W and an 1/8 Page Color rate for this ratecard and several other ratecards in my other products. It would be a bit cumbersome to open all the affected ratecards on several product lines to add in the new sizes manually, so instead I can create an import, referencing the existing ratecard ID's, but the ratecard import will create new rate lines on the existing ratecard(s). Here is my new import file, with just the rate lines needing to be appended to the existing ratecards.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Product ID	Ratecard ID	Ratecard Description	Default Fr	Apply Freque	Client Type	Client	Currency ID	Edition	Start Date	End Date	Original R Color	Line Description	Allow C	Section	Posit	
NAV13	39	Retail Open Rates	COMM	TRUE					1/1/2019	12/31/2025		4C	1/8 Page (BS) 4C	N		
NAV13	39	Retail Open Rates	COMM	TRUE					1/1/2019	12/31/2025			1/8 Page (BS) B&W	N		
NAV10	146	Retail Open Rates	COMM	TRUE					1/1/2019	12/31/2025		4C	1/8 Page (BS) 4C	N		
NAV10	146	Retail Open Rates	COMM	TRUE					1/1/2019	12/31/2025			1/8 Page (BS) B&W	N		

I navigate to Setup -> Import / Export Ratecards and select the Import Standard Ratecard Lines option, I import in my new ratecard:



IMPORT STANDARD RATECARD LINE DETAIL

Standard Ratecard Import

- Ratecard Line Import
 - Export Standard Ratecard Lines
 - Export Listing Ratecard Lines
 - Import Standard Ratecard Lines**
 - Import Listing Ratecard Lines
 - List of Imported Ratecard Lines
- Ratecard Copy
 - Export Standard Ratecards
 - Copy Standard Ratecards From Import File
 - Export Listing Ratecards
 - Copy Listing Ratecards From Import File

Standard Ratecard Import

This process will import ratecard card line details that you have previously generated with the Export feature, and adjusted in Excel.

File to Import: digital_ratecards (4).xlsx × Remove

Download Temp

Test Import File

Import File

FILE CHECK COMPLETE

4 items are good to import.
0 errors encountered while importing item data.

OK

When I now re-open ratecard #39, I see the two new 1/8 Page sizes have been appended to the list of rates:

20	1067	707.76x756 (1/2 Page BS in Points)	Full Color CMYK	1/2 Page BS in Points	No	210,000		Print Display, Modular	Print Display	0.00	0.000	Naviga Print News Specs (PR)	4,000,000.00	No	No	View Line Change History	
21	1218		Full Color CMYK	Front Page Sponsor	No	5,000	A-News Section	Front Page Sponsor	Print Display, Col x in	4.00	2,000		150,000.00	No	No	View Line Change History	
22	1246	4.832x5.25 (1/8 Page (BS))	Full Color CMYK	1/8 Page (BS) 4C	No	52,500		Print Display, Modular	Print Display	0.00	0.000	Naviga Print News Specs (PR)	1,000,000.00	No	No	View Line Change History	
23	1247	4.832x5.25 (1/8 Page (BS))		1/8 Page (BS) 8B/W	No	52,500		Print Display, Modular	Print Display	0.00	0.000	Naviga Print News Specs (PR)	750,000.00	No	No	View Line Change History	

Page: 1 of 1 Page size: 23 Change Item 1 to 23 of 23

Delete Cancel Save

Day of Week Sections for Newsletters/Date-based Digital Products

Similar to what we already offered for Print, we can now limit sections in newsletters to be only available on certain days of the week:

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

Sections

Product: Another E-Newsletter

Section ID: SEC2 New

Section Name: Section 2

Section URL:

This Section is only Published on: Tuesday, Wednesday

Only Used on Ratecards: ☐ No

Inactive: ☐ No

Default Key/Value Targets for this Section

Key	Value(s)	Delete
-- No Records --		

After setting the sections for the desired days of week, in order entry, the available run dates will be filtered for those day(s) of week.



NEW COST PER DAY LINE

Pricing	Other	Google Ad Manager	Expected Sizes	Creatives	Custom Fields	Production Notes	Category MetaData	Sales Rep(s)
Ad Type	Cost Per Day Sponsorship			Section	Section 2		PRICING PER ISSUE	
Product	Another E-Newsletter			Position	Position A		Ratecard Price Per Day 9,000.00	
Contract				Audience	Technology		Adjustments 0.00	
Ratecard	Digital Rates (Group)			G/L Type	Web Sponsorships		Discount Price 9,000.00	
Description	Takeover Rate			Proportion Values	Evenly by Issue		Billing Days 0	
							Billing Amount 0.00	
							TOTAL FOR ALL ISSUES	
							Billing Total Days 0	
							Billing Total Amt 0.00	
							Estimated Tax 0.00	
							Estimated Total 0.00	

Line Details							Engagement Tracking		Adjustments					
Schedule Date	Material	Material Status	Billing Days	Billing Amount	Current Days	Current Cost	Select an Event Date to Add							
-- No Dates Selected --							Select	Date	Day	Max Allowed	Quotes	Reserved Orders	Confirmed Orders	Available Qty
							☐	2/20/2024	Tuesday	N/A	N/A	N/A	N/A	N/A
							☐	2/21/2024	Wednesday	N/A	N/A	N/A	N/A	N/A
							☐	2/27/2024	Tuesday	N/A	N/A	N/A	N/A	N/A
							☐	2/28/2024	Wednesday	N/A	N/A	N/A	N/A	N/A

Cost G/L's added to G/L Override Import

The following fields have been added to the [G/L Override import](#) 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**
 - G/L Overrides Import
 - Tax Overrides
- PRICING RULES
 - Ratecards
 - Price Adjustments
 - Price Adjustments Import
 - Auto Adjustments
- SECTIONS & POSITIONS
 - Sections
 - Sections Import
 - Positions
 - Inventory by Position
 - Positions Import
 - Copy Sections/Positions
- ISSUE-BASED SETUP
 - Published Dates
 - Issue Configuration

G/L Overrides

Product: The Star QA Daily Newspaper

G/L Defaults

Receivables G/L Code: 01*00*0000*00*0150 Accounts Receivable

Revenue G/L Code: 01*02*2000*50*3640 DEFAULT WEB REVENUE

Agency Comm. G/L Code: 01*02*2000*50*3640 DEFAULT WEB REVENUE

Cost G/L Code: Select a Specific G/L Account, a From Rang

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

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	Key Accounts	01*03*3002*50*3500	01*03*3002*50*3500	01*20*2500*50*7400	02*20*2500*50*5050	
RTST	KEY	ADVERTISING SALES CH	ADVERTISING SALES CH	Cost of Sales	Accounts Payable - Pending	
Production Charges	BAN	01*01*1000*50*3500	01*01*1000*50*3500			
		PRINT ADVERTISING SALES CT	PRINT ADVERTISING SALES CT			
TEST 2 DESC	TEST2	01*01*0001*00*4100	01*01*0001*00*4100			
		PRINT ADVERTISING SALES CA	PRINT ADVERTISING SALES CA			

Industry Code Overrides

Add an Override

G/L Type	Revenue G/L Code	Agency Comm. G/L Code

Field Name	Example	Conditions	Mandatory/ Optional
Cost GL Code	01*20*2500*50*7400	This is the G/L code associated with the cost if using Cost Rates . Must match G/L code already in the system.	Optional
Cost AP GL Code	02*20*2500*50*5050	This is the G/L code associated with the pending AP if using Cost Rates . Must match G/L code already in the system.	Optional

Advertiser and Agency Reports Configurable Columns

Two additional reports are now allowing for configurable columns: Advertiser Listing and Agency Listing:

Main Menu

Ad Home

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

AGENCY LISTING

List of All Agencies

Configure Output

ID	Name	Access Code(s)	Address	City	State/Province	Zip/Postal Code	Country	Phone	Created On	Website
263331	310 Artists Agency	Access Group BB, Access Group AA	3500 West Olive Avenue	Burbank	CA	91505	UNITED STATES	*****	5/5/2023	http://www.310artists.com/
244322	B4 TEST AGENCY - BB Access Group	Access Group BB							1/18/2013	
263300	829 Studios	Access Group CC, Access Group AA	300 Massachusetts Avenue	Boston	MA	02115	UNITED STATES		4/24/2023	
263324	88 Media AgencyS		Peter vei 8	OSLO	Oslo	0585	NORWAY	*****	5/4/2023	
229422	AAA Advertising Agency	Access Group BB	1111 Kings Highway Suite 200	FAIRFIELD	CT	06432	UNITED STATES	*****	9/19/2005	aaaaa.com
244707	ACCOUNT TYPE CHANGE		1 ACCOUNT ROAD	STAMFORD	CT	06901	UNITED STATES		4/21/2014	
229314	ADAGE AGENCY		455 MADISON AVE	NEW YORK	NY	10016	UNITED STATES		5/23/2005	
104124	ADPRO INC		30500 SOLOIN INDUSTRIAL PKWY	SOLOIN	OH	44139	UNITED STATES	*****	1/10/2002	WWW.ADPRO.NET
240015	Advertising Unlimited		222 WEST 23RD STREET	NEW YORK	NY	10003	UNITED STATES		3/10/2008	
103268	AGENCE MEESTERS		3 F JACQUES COEUR	75004 PARIS			FRANCE	*****	4/10/2000	
244606	Agency		7 agency lane	SOUTH SALEM	NY	10590	UNITED STATES	*****	1/6/2014	
254424	Agency 1						United Kingdom		11/24/2015	
241382	AGENCY FOR 7.3 TESTING		1010 WASHINGTON BLVD	STAMFORD	CT	06901	UNITED STATES	*****	3/30/2009	
231179	AGENCY FOR JLH								11/4/2005	
231177	AGENCY FOR MSG								11/4/2005	
258176	AGENCY USED BY EURO CUSTOMER BUT ASSIGNED STERLING		Lovingsgatan 16	Helsingborg	SE	25450	SWEDEN	*****	5/16/2022	
101382	AGP & ASSOCIATES								1/3/2001	
255555	ALB Agency		4891 W Alhambra Pt	SAN JOSE	CA	95123	UNITED STATES		12/15/2020	

These reports can be found under the Customer menu in the Advertising Module:

Customers	Campaigns	Production
Advertiser / Agency Inquiry		
Advertiser / Agency Maintenance		
Approve Pending Accounts		
Advertiser Listing		
Agency Listing		
Brands		
Client Budget Setup		
Advertiser Orders		
Agency Orders		

To configure the columns, select the Configure Output tab and select the desired fields. Available fields are displayed on the left. Move them to the right using the left and right arrows. Move the order with the up and down arrows or simply drag and drop to the desired position. Repeat for both the on screen columns and the excel export columns.

AGENCY LISTING

The screenshot shows the 'AGENCY LISTING' configuration interface. It is divided into two main sections: 'ON SCREEN COLUMNS' and 'Excel Export Columns'. Both sections have 'Reset Configuration' and 'Save Configuration' buttons. Under 'ON SCREEN COLUMNS', 'Available Grid Columns' lists ID, Website, and Access Code(s). 'Selected Grid Columns' lists Name, Address, City, State/Province, Zip/Postal Code, Country, Phone, and Created On. Under 'Excel Export Columns', 'Available Export Columns' lists the same fields. 'Selected Export Columns' lists ID, Name, Access Code(s), Address, City, State/Province, Zip/Postal Code, Country, Phone, Created On, and Website. Purple boxes highlight the 'Address' field in the 'Selected Grid Columns' and the 'Address' field in the 'Selected Export Columns'.

CRM Module

Opportunity Linked Proposals

There was a small mod made to opportunities to allow for better performance. Previously, in the proposals and campaigns section there was a dropdown of existing proposals the user could select and link to an opportunity. It isn't a frequently used feature as generally the proposal is generated *from* the opportunity rather than created separately and linked back to the opportunity - but it was causing some slowness when creating new opportunities for some users due to the query running to find possible proposals to include in the dropdown.

Going forward, instead of loading that list of proposals every time, there is now a button in the proposals section, and the user can click on it to run that query as needed, and then select proposals to link to the opportunity.

The screenshot shows the CRM Module interface. The 'Proposals & Campaigns' section is active. The 'Link an Existing Proposal / Campaign' button is highlighted with a purple box. A modal window titled 'SELECT PROPOSAL / CAMPAIGN' is open, showing a table with columns 'ID' and 'Proposal Date'. The table contains one row with ID 1947 and Proposal Date 2/1/2024. The modal also has a dropdown for 'Proposal / Campaign'.

Flag notifying that a contact receives statements

On the My Contacts and Other Contacts tabs on the customer overview screen (CRM Tab), there is a new column added to alert the user that the contact person is used to receive statements for this account. This is just informational on this page and is meant to alert the user to use caution if making any changes to the contact record since it could affect statements.

My Contacts Other Contacts Leads									
Add a New Contact									
Name	Company	Telephone	Mobile	Email	Job Title	Categories	Divisions / Brands	This Contact Receives Statements	Add to My Contacts
Jonathan Davis	BMW of North America, LLC	215 336-3336		navigademotest2+BMW	Manager			☐	
Amanda Smith	BMW of North America, LLC			amanda.enderle@nav	Marketing			☐	
Accounts Payable	Ogilvy & Mather							☐	
Claire Jacobson	J. Walter Thompson	212 333-4444		navigademotest3+JW	Marketing			☒	
Accounts Payable	J. Walter Thompson							☐	
Kelly Smith	Kelly's Creations	267 475-3280	267 475-3281	navigademotest3+Ke	Creator Extraordinaire			☐	

Contacts becoming accounts has been fixed

I don't generally put bug fixes in the release guide for new features, but this one seemed like a big one that folks would want to know about since it is a behavior change to the system. Previously when a contact was created in CRM, but then opened and edited in the Ad Module, it was turning that contact into an account, which could then have orders booked against it. That issue has now been resolved and contacts should stay as contacts.

Contacts will still have a unique ID. If you have a contact person for one account who is also actually going to advertise, you would need to set them up separately as an account. So, for example, if you were my contact for the Company ABC, but then you tried to sell your bicycle, I'd live in a lovely world with two of you! The original contact record could be linked to the new account if they are using the same email address as their other account, so that you don't end up with duplicate emails.

Accounts Receivable Module

Bad Debt Indicator on customer account

There is now an indicator on a customer record if they have invoices which have been transferred to a collection agency AND have not been recovered by the collection agency

When the written off invoice has been paid, the user will be prompted in cash receipts if they would like to remove the bad debt indicator on the customer account:

More visibility for Client Access Codes

This will not affect most of you, since it is rare for folks to have this feature turned on, but several releases ago, we introduced the concept of [Client Access Codes](#), which restrict which customers certain users can access. Most users, when sites use Client Access Code, will only have access to a single access list. Finance Users, however, will often have access to all, or multiple access lists, so for these users, it became necessary to display which Access list(s) the customer they are looking at belongs to. So several places have this added information:

1. The dropdown name search in Order Entry:

Campaign Setup **Other Information**

Campaign ID: New Campaign Start Date:

Campaign Billing Type: Performance Campaign End Date:

Campaign Description: Run until cancel:

Advertiser ID:

Advertiser Name:

Advertiser Address:

Client Type:

Brand:

Agency / Bill-to:

Billing Contact:

ID	Name	Client Type	Access Code(s)	City	State/Region	Postal Code	Country
255078	Underwater World Horsham	I	AA, CC	HORSHAM	PA	19044	US
244008	BMW of North America, LLC	L		WESTWOOD	NJ	07677	US
263063	Planet Health Club	M	AA, BB	Limerick	CW	IE	IE
255331	Law offices of Dewey and Dewey	I	BB	SANTA MONICA	CA	90401	US
255435	Round Guys Brewing Company	EXT	BB	Lansdale	PA	19446	US
256827	1Import1						
265060	Cardinal Camera	I		LANSDALE	PA	19446	US
265042	El Limon Lansdale	I		LANSDALE	PA	19446	US
254966	Volkswagen USA			HERNDON	VA	20171	US
255076	Santa Fe Brewing Company			SANTA FE	NM	8750-8449	US
244615	Blackfeet Nation		AA, BB, CC	ARDSLEY	NY	10502	US
255344	Classified Self Service Customer	TR	BB	SANTA MONICA	CA	90402	US

2. Campaign Inquiry Screen (accessed from either **Campaigns -> Campaign Inquiry** or the magnifying glass next to the Campaign ID on the Campaign Header):

CAMPAIGN SEARCH

Search Criteria

Advertiser ID:

Advertiser Name:

Agency ID:

Agency Name:

Campaign ID:

Campaign Description:

Product Group:

Product:

Section:

Position:

Status:

Currency:

External ID:

Line ID:

Invoice ID:

Campaign P.O. Number:

Material ID:

Client Access Code:

Region 2
Region 1
Region 3
All Regions

Select any campaigns that were running at any point between the start and end range.



3. The Customer Search criteria:

CUSTOMER SEARCH

Customer Search **Go**

☐ Only Search My Database

Advanced Search | Search by Card Transaction | Search Results | History

Advertiser/Name

☒ Words starting with ☐ Full name starting with

Record Type

Email

Phone

Area Code

Client Access Codes

- ☐ Access Group AA
- ☐ Access Group BB
- ☐ Access Group CC

Address

City

State

Zip

Country Code

Module

Client Type

Advertiser Client Type

Name Class

Include Records Flagged as DO NOT USE

Invoice ID

Payment ID

Statement ID

Agency Order ID

Legacy ID

External ID

4. The search results tab for customer searches:

CUSTOMER SEARCH

Customer Search **Go**

☐ Only Search My Database

Advanced Search | Search by Card Transaction | **Search Results** | History

Map these Results

	Client Type	Advertiser Client Type	Client Access Codes	Client ID	ID	Name	Parent / Employer	Has Children	Address	City	State	Zip	Country	Telephone	Email	Modules	A/R Balance	Do Not Use	Name Class
								☐										☐	
	AD	I	AA, CC	255078	255078	Underwater World Horsham - Underwater World		☐	495 Easton Rd	HORSHAM	PA	19044	US	(215) 672-4180	newsycledemo@gmail.com	Ad/Ex	-230,780	☐	BA
	AD	I	AA, CC	255078	255078	Underwater World Horsham		☐	495 Easton Rd	HORSHAM	PA	19044	US	(215) 672-4180	newsycledemo@gmail.com	A/R	-230,780	☐	BA
	AD	TGT		256682	256682	Underwater Wicker Technology Inc. - Underwater Wicker Technology Inc.		☐	6755 Yolanda Ave	LOS ANGELES	CA	90055	US	(310) 626-8787		Ad/Ex	1,260	☐	02
	AD	TGT		256682	256682	Underwater Wicker Technology Inc.		☐	6755 Yolanda Ave	LOS ANGELES	CA	90055	US	(310) 626-8787		A/R	1,260	☐	02



5. The Client Overview Screen, A/R Tab:

UNDERWATER WORLD HORSHAM ADVERTISER / ADVERTISER

Account Overview

Account ID: 235078
Account Opened: 2/7/2019 (5 years) ago
Bill to Account: Underwater World Horsham
Default Billing Contact: Ed Guzik
Main Address: 495 Easton Rd, HORSHAM, PA 19064
Client Type: Local (S)
Client Access Codes Allowed: AA, CC
Phone: 761-888-8888
Fax: 761-888-8888
Website: www.underwaterworld.com
Email Address: news@underwaterworld.com
Life-to-Date Billing: 2,045,590.75
Average Days To Pay: 105

Additional Information

Parent: Credit Step Status: In Good Standing
Out of Business: No
Default Billing Currency: Credit Step Date: Eligible for Service Charges: No
Local Currency: Receives Statements: Yes
Payment Terms: Credit Control Status: Pre Payment Required: No
Net 30 Days: Next Contact: Bad Debt: No
Default Tax Code: NO TAX
Credit Rating: Date of Last Note: 1/10/2024
Assigned Credit Controller: Kelly Smith (USER KSMITH)
Credit Limit: 1,000,000
Tax Exemption No.:
Refund Vendor: Last Payment Date: Thursday, February 15, 2024
Last Payment Amount: 23.50
CR Hold Days: 120

Billing Trends

Billing by Year

2020: 100k
2021: 100k
2022: 100k
2023: 100k
2024: 100k

Billings & Receipts

2023-01: 100k
2023-02: 100k
2023-03: 100k
2023-04: 100k
2023-05: 100k
2023-06: 100k
2023-07: 100k
2023-08: 100k
2023-09: 100k
2023-10: 100k
2023-11: 100k
2023-12: 100k
2024-01: 100k
2024-02: 100k

6. Advertiser ID Dropdown on various screens like Brand Maintenance (shown below), Client Contract Setup, Client Budget Setup, Trade Contract setup:

BRAND MAINTENANCE

Brand Details

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	Name ID	Client ID	Name	Access Code(s)	City	State/Region	Postal Code	Country
Brand ID	100140	100140	Underwater World	01	Horsham	PA	19044	USA
Brand Name	100005	100005	Starbucks	03	COOPER CITY	FL	33330	USA
	100163	100163	Speedy Printing Co		WICHITA	KS	67207	USA
Industry Category/PIB	100057	100057	BMW of North America, LLC		WESTWOOD	NJ	07677	USA
Ad Index Name	100249	100249	St. Mary Medical Center		Valparaiso	IN	46383	USA
	100143	100143	Backyard Beans		Lansdale	PA	19446-2518	USA
Allow use on Portal	100032	100032	Home Depot Corporation		ATLANTA	GA	30315	USA
	100197	100197	University of Arizona		TUCSON	AZ	85721	USA
Inactive	100136	100136	B&H Photo		NEW YORK	NY	10001	USA
	100004	100004	ANDERSON PACKAGING INC.		ROCKFORD	IL	61109	USA

Also related to access codes. The 2024.1 release added an option to make this field a single value field instead of the existing multi-valued field. Only Naviga Personnel can set the flag to use Access Codes or to make it a single-value field instead of the default, multi-valued. If the flag is set for single valued, then the screens will change slightly compared to the screenshot in #2 above. It will be a dropdown where only a single option can be selected.

Client Access Code

Region 3
Region 2
Region 1
Region 3

Comments

Easier searching for A/R Payment Imports

The list of payments report previous could only be filtered by the Import ID, which the user isn't generally going to remember, to the screen has been updated to allow for searching on the date and company. The import ID does still display in the results grid, so that can also be used as a filter should there be multiple imports in the date range.

LIST OF IMPORTED A/R PAYMENTS

List of Payments

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

Imported A/R Payments

Start Date

1/1/2020

Get Payments

End Date

4/2/2024

Company No.

Leave Blank for All Companies

Imported Payments

Payment ID	Import ID	Client ID	Client	Date	Company No.	Currency	Amount
> 15465	1	100002	Chevron Chemical	11/5/2020	01		6,364.00
> 64534	2	100003	Dow Corning	11/5/2020	01		9,112.00
> 67575	2	100004	ANDERSON PACKAGING INC.	11/5/2020	01		600.00
> 164690	6	100005	Starbucks	3/4/2024	01		10,074.17
> 23158	6	100005	Starbucks	3/4/2024	01		10,074.17
> 410707	6	100005	Starbucks	3/4/2024	01		4,995.00
> 453607	6	100005	Starbucks	3/4/2024	01		13,809.95
> 623304	6	100005	Starbucks	3/4/2024	01		2,160.00
> 651726	6	100005	Starbucks	3/4/2024	01		217.05
> 758268	6	100005	Starbucks	3/4/2024	01		797.73
> 857531	6	100005	Starbucks	3/4/2024	01		203.06
> 863023	6	100005	Starbucks	3/4/2024	01		940.51
> 690917	6	100005	Starbucks	3/4/2024	01		10,074.17

Classified Self-service Portal

Metadata Exclusions on Packages

We were able to patch this one back to 2023.6, but it is 'officially' considered a 2024.1 new feature since it was added just before 24.1 was released. What metadata exclusions allows you to do is prevent certain metadata from being displayed based on the package chosen in Self-service. Suppose for example that you had Good, Better, Best packages at different price points. Perhaps the good package just includes the basics; the Better package might allow for a logo to be added; and the Best Package, maybe you also display the online options for Recruitology and Own local add-ons.

To configure this, first navigate to **Setup -> Classified Order Setup -> Classified Package Setup**. The bottom section of Classified Package setup now has a new tab called Metadata Exclusions.

Other Optional Templates2 items checked

Valid From1/1/2020

Valid Through12/31/2050

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 OptionsMetadata Exclusions

The Exclusions set here currently work on the Classified Self-Service Portal only.

Exclude from Package	Field	Merge Tag
☐	Headline/Job Title	#HEADLINE#
☐	Long Description	#LONG_DESCRIPTION#
☐	Salary Range	#SALARY#
☐	Salary Type	#SALARYTYPE#
☐	Benefits	#BENEFITS#
☐	Company Logo	#LOGO#
☐	Background Color	#BACKCOLOR#
☐	Text Color	#TEXTCOLOR#
☒	Send to Recruitology	#RECRUITOLOGY#
☐	Recruitology.com Listing Type	#LISTINGTYPE#
☐	OwnLocal	#OWNLOCAL#
☐	Start Date	#STARTDATE#

Then, for any items you wish to hide from the user for this package, check the column Exclude from Package. Save the package.

Couple of important notes:

- There is a field in Category Metadata setup where you can allow or hide in self-service. If you set it to hide in self-service at the category level - it will always be hidden, regardless of what you select on the package. So if you want to allow in some packages, you must set to allow on the category setup, and then exclude on whatever packages you wish to exclude it.

EDIT CATEGORY								
Category Setup		Online Options	Classified Stylesheet	Category MetaData				
Level	Label/Question		Prompt Type	Validation	Formatting	Merge Tag	Required	
Employment	Headline/Job Title		Single-Line Text	No Validation		HEADLINE	☒	
	Sort Code		Allow in Self-Serve	Maximum Characters (Leave)				
Employment	Long Description		Multi-Line Text	Maximum Characters (Leave)		LONG_DESCRIPTION	☐	
	Sort Code		Allow in Self-Serve					
Employment	Salary Range		Number Range	Minimum Value	Zero Decimals	SALARY	☐	
	Sort Code		Allow in Self-Serve	Maximum Value				
Employment	Salary Type		Dropdown List Selection	☐ Multi-Select		SALARYTYPE	☐	
	Sort Code		Allow in Self-Serve	☐ Allow Custom Text				
				Per Hour, Per Year				
Employment	Benefits		Dropdown List Selection	☒ Multi-Select		BENEFITS	☐	
	Sort Code		Allow in Self-Serve	☐ Allow Custom Text				
				401(k), Medical Insurance, Paid Vacation, Flexible Hours				

- Since the packages are at the category TREE level and not the individual sub-category level, only the TREE metadata will be displayed here. You cannot include/exclude sub-category level metadata from packages.

CATEGORY SETUP

Category Setup

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

Category Tree Setup

Category Tree: Automotive + Download

Category Structure

Add New Category

Expand All Collapse All

- Automotive
 - ** Ad Headline (TEXT)
 - ** Long Description (MULTILINE_TEXT)
 - ** Uploaded Image (IMAGE)
 - ** Attention Getter Image (IMAGE)
 - ** Contact Phone (TEXT)
 - ** Contact Email (TEXT)
 - ** Web URL (TEXT)
- Cars
 - ** Make (MULTI_SELECT)
 - ** Model (TEXT)
 - ** Year (NUMBER)
 - ** Color (MULTI_SELECT)
 - ** Mileage (NUMBER)
 - ** Asking Price (NUMBER)
- Trucks/SUV's
 - ** Make (MULTI_SELECT)
 - ** Model (TEXT)
 - ** Year (NUMBER)
 - ** Mileage (NUMBER)
 - ** Asking Price (NUMBER)
 - ** Color (MULTI_SELECT)
- Automotive Services

Can exclude from packages.

Cannot exclude from packages.

[Here](#) is a little video on how this new function works:

