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

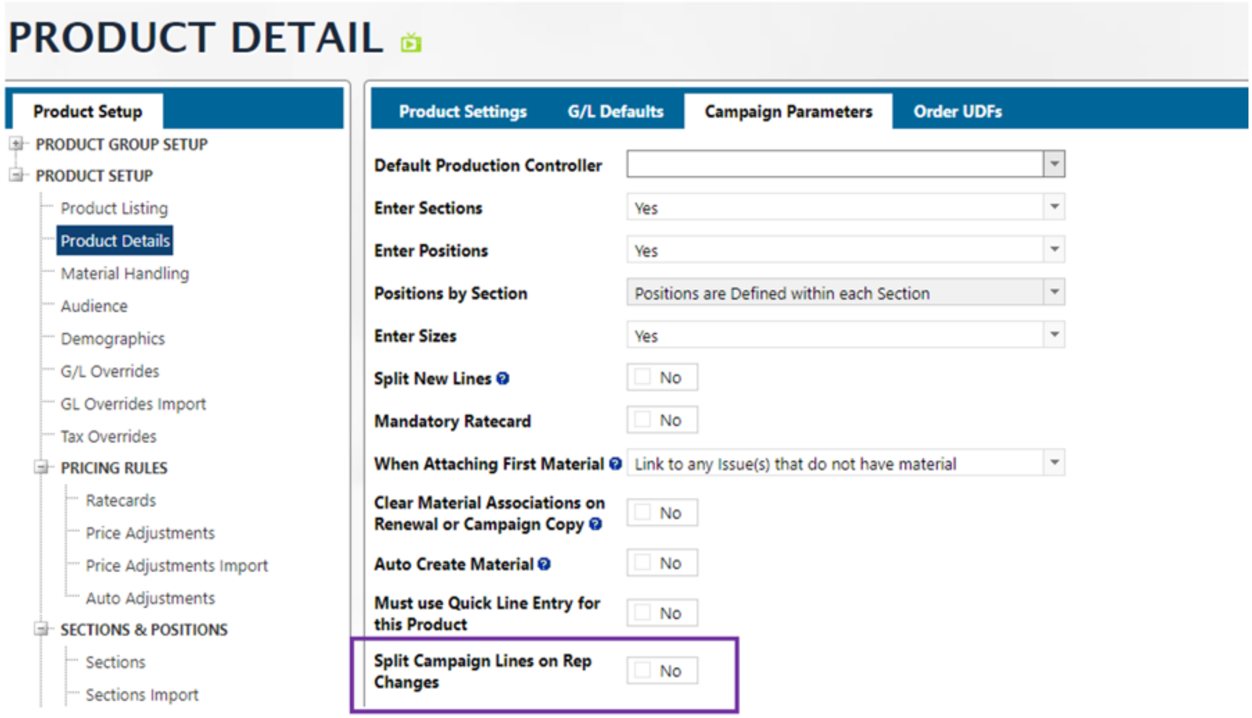
There was a fairly significant change to Brand Reps in that you can now schedule rep changes in advance. In prior releases, a change to sales rep on Brand Maintenance would take place immediately and it was recommended that changes to rep structure be made on the day it was to take effect (could be imported 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.

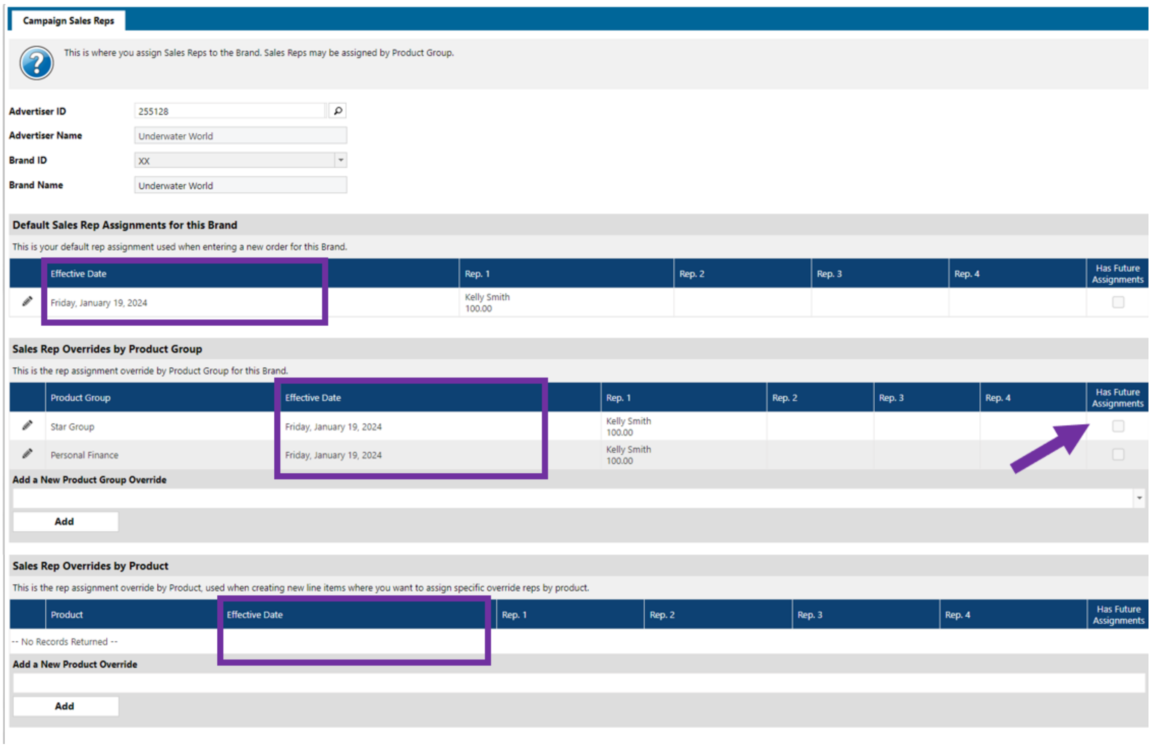
For lines which don't split, the system will behave as it used to - where the rep on the line will be changed - and anything that was already billed will belong to the prior rep and anything that hasn't yet been billed will change to the new rep. So do be aware of this when making rep changes that you 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

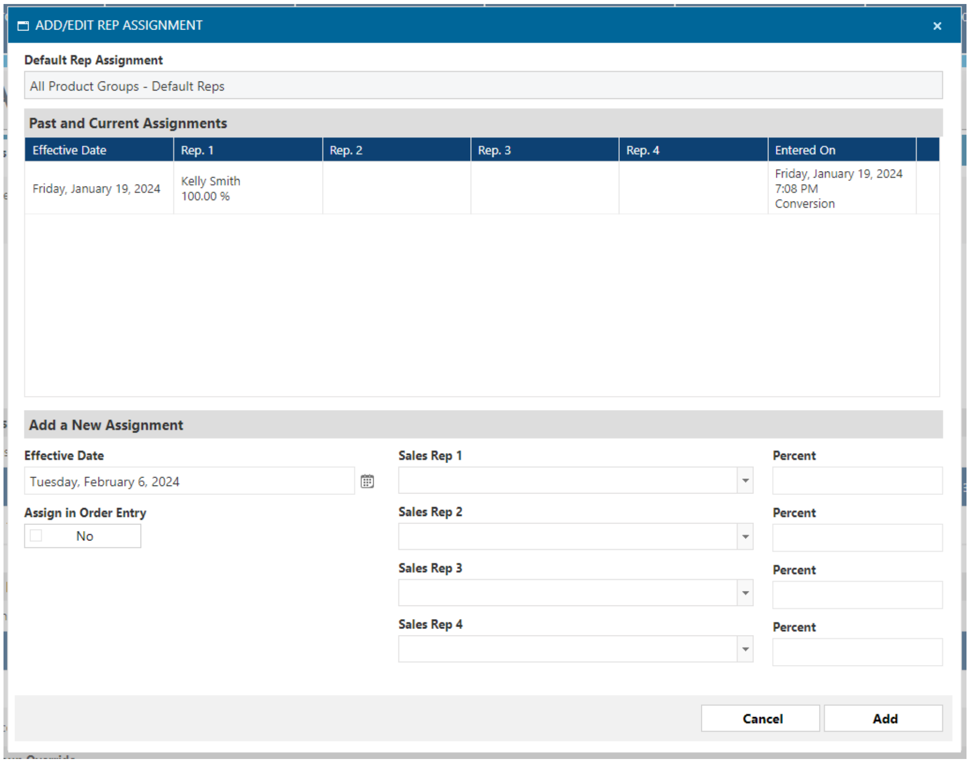


Similarly, if someone schedules a new order after the above change has been entered, and the order will start In February and run until the end of March, upon save of that new line, the order will auto-split, because the system already knows that as of March 1, another sales rep will be taking over.

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.



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



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

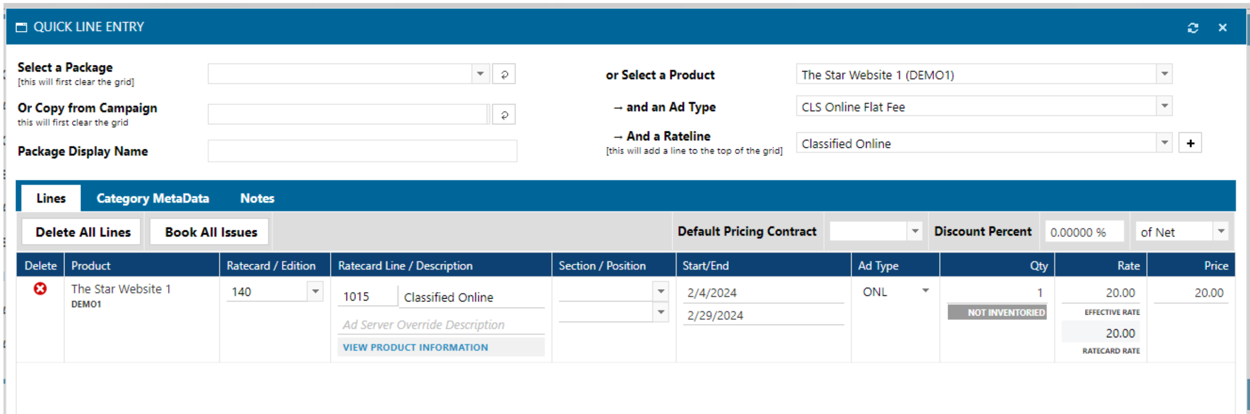
Advertiser ID	Advertiser	Brand ID	Brand	Assignment Type	Product / Group	Last Campaign Ending Date	Split
100163	Speedy Printing Co	A1	Kellogg Dr Location	Group	Customer Demo	7/10/2022	50.00%
100335	Keswick Theatre	XX	Keswick Theatre	Group	Naviga Product Group		50.00%
100001	Exxon Mobil	XX	Exxon Mobil	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	Glaxo Smith Kline	XX	Glaxo 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	1/9/2026	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%
100039	Kentucky Mining Consortium	XX	Kentucky Mining Consortium	Brand Default	Brand Default	12/31/2019	100.00%
100041	Marriott International, Inc	XX	Marriott 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	Fosters Traditional Foods Ltd.	XX	Fosters 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%
100158	Tim Hortons	XX	Tim Hortons	Brand Default	Brand Default	12/27/2024	50.00%
100189	Re/Max - Joe Moore	XX	Re/Max - Joe Moore	Brand Default	Brand Default	4/1/2023	50.00%
100335	Keswick Theatre	XX	Keswick Theatre	Brand Default	Brand Default		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

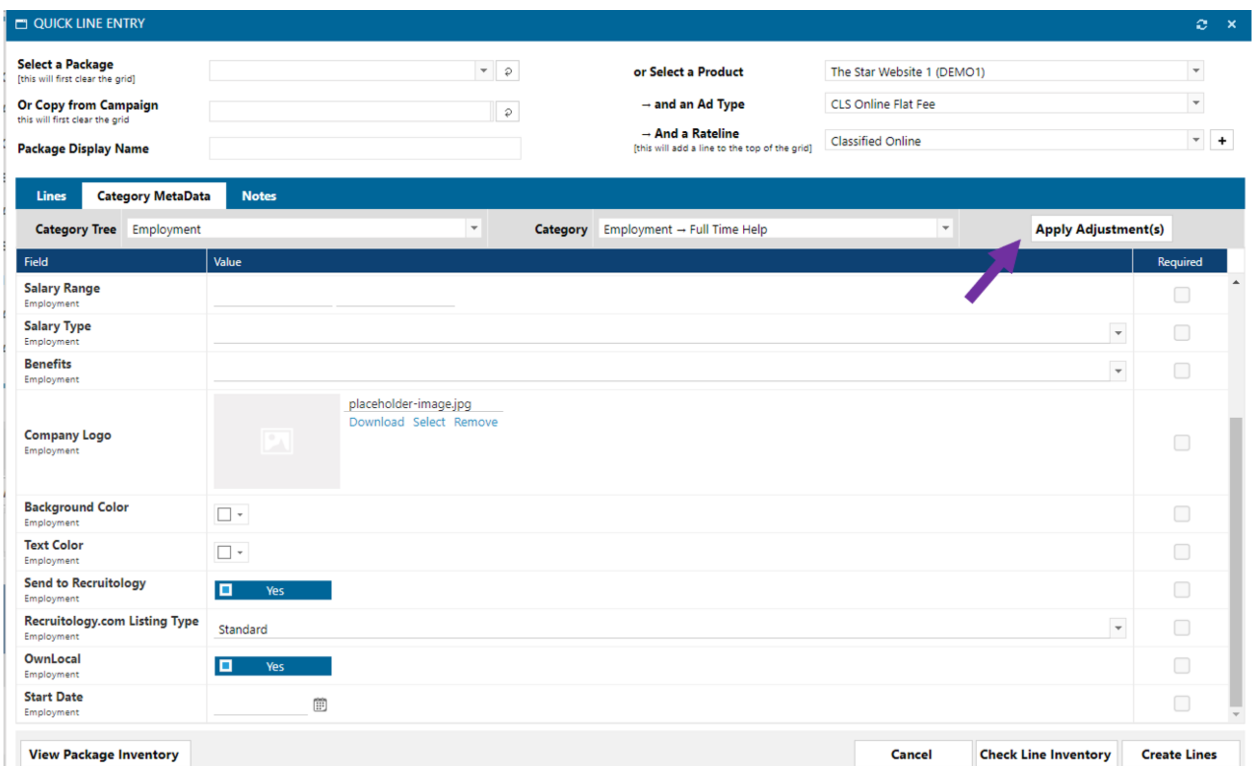
For classified display ads where metadata is used to trigger surcharges on a campaign, these surcharges can now be added to line items when saving the Quick Line Entry screen to create the line items.

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:

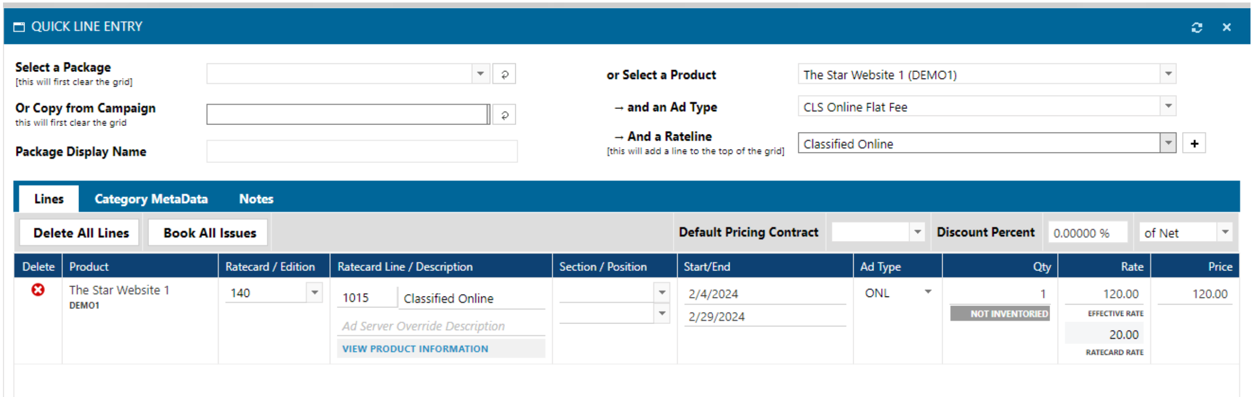


Note the price for this is a flat $20 for this line item

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:



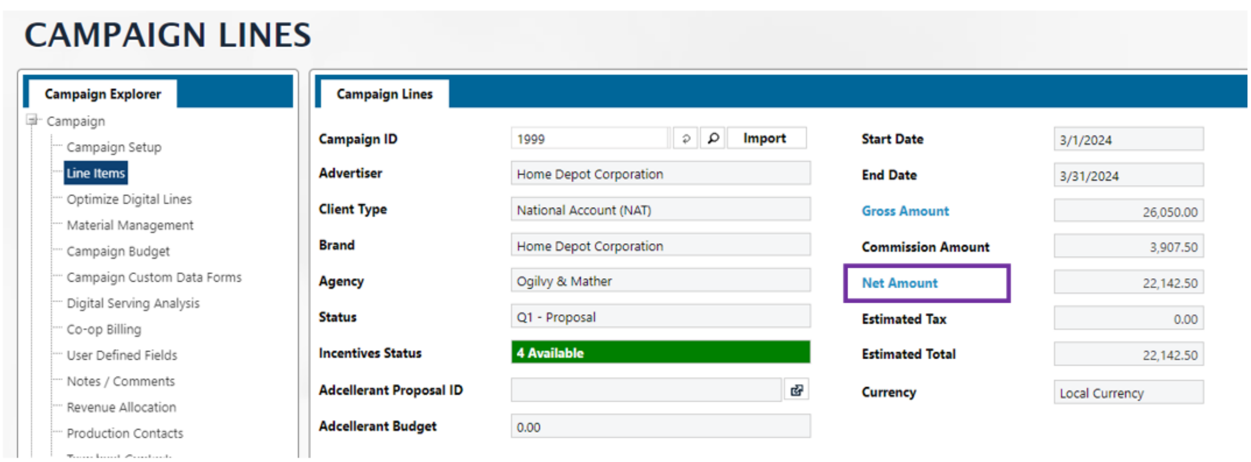
The user can then click Create Lines from this screen, or toggle back to the "Lines" tab and confirm that the metadata charges were added:



Override Campaign Price (Net)

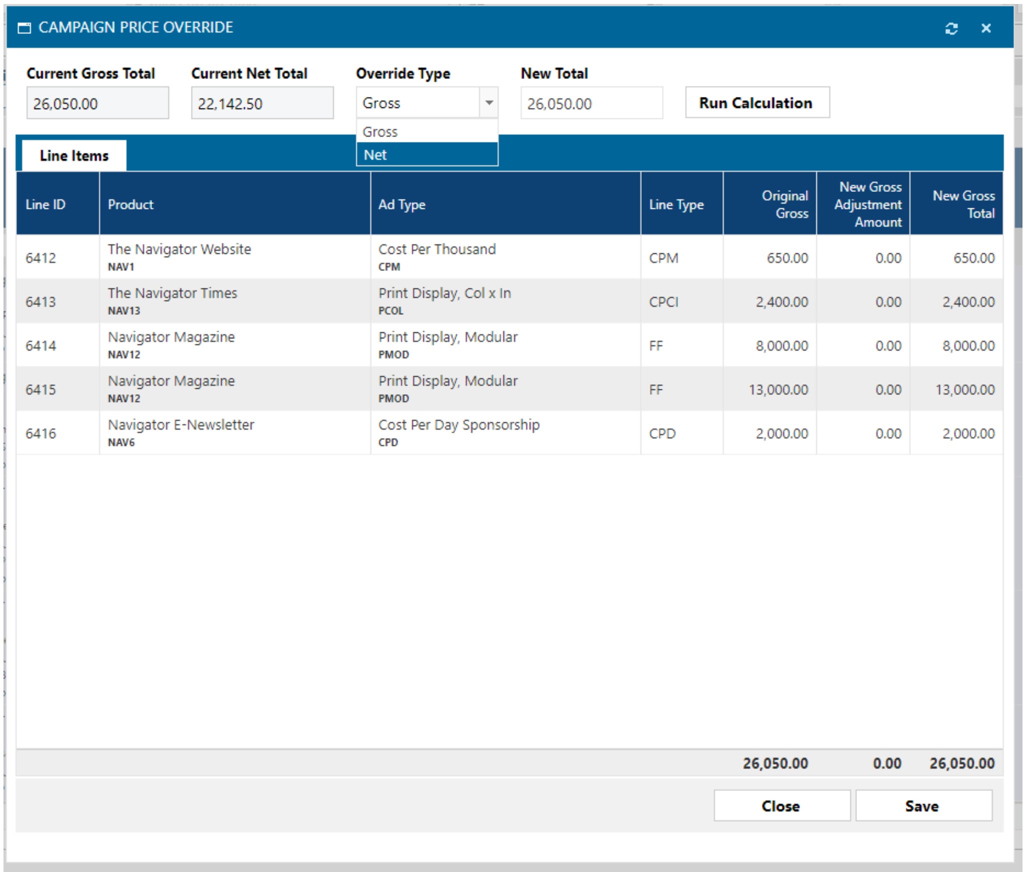
In 2023.5, we introduced the concept of Overriding the Campaign price by clicking on the Gross Amount link on the campaign lines screen and typing in the price. The system would then determine how much discount to apply to each line. Agency commission would be calculated after that bottom line override 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:



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:

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)



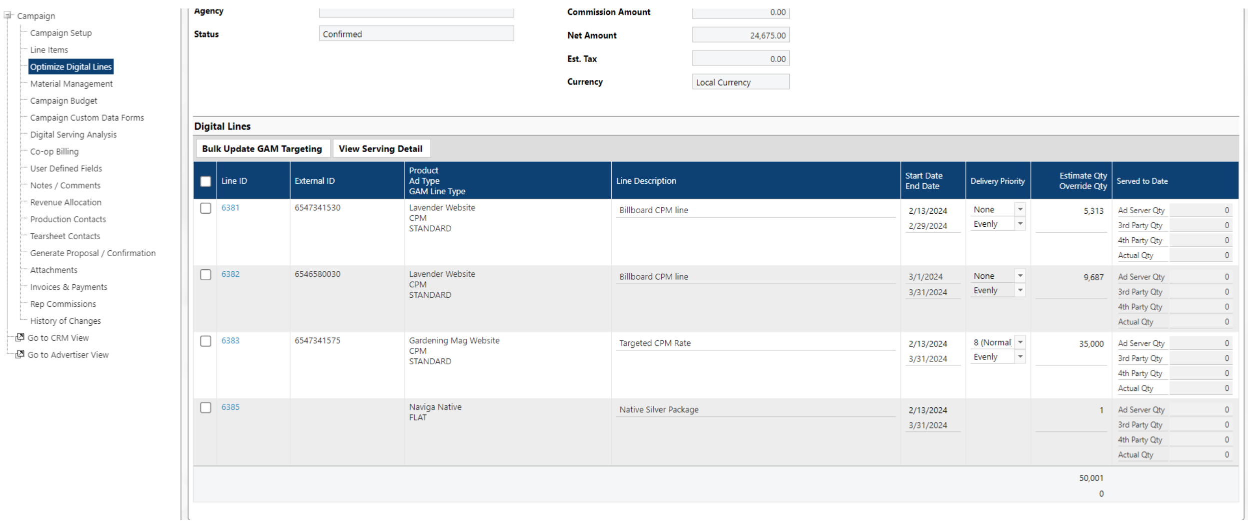
Adjustments will be proportionately created for each line item. If there are any existing bottom line overrides on the order already, it will automatically be removed and added back with the new price. You can only have one bottom line override on an order line.

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:

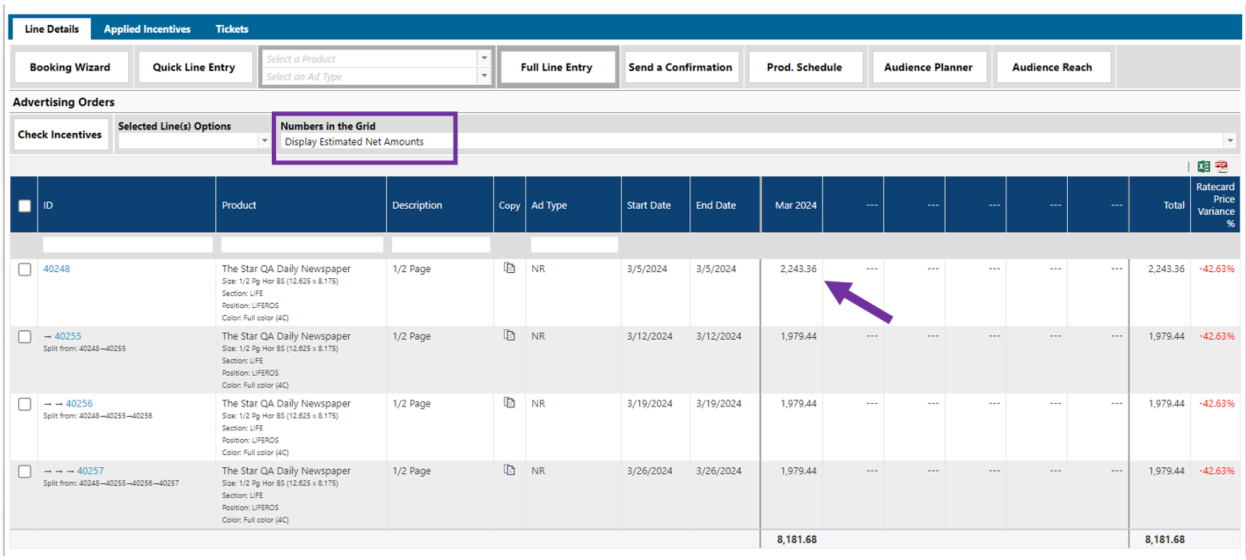
- Start/End Dates (once it has started, only end date can be edited),
- delivery priorities,
- override qty,
- description (until Invoicing has started)



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.

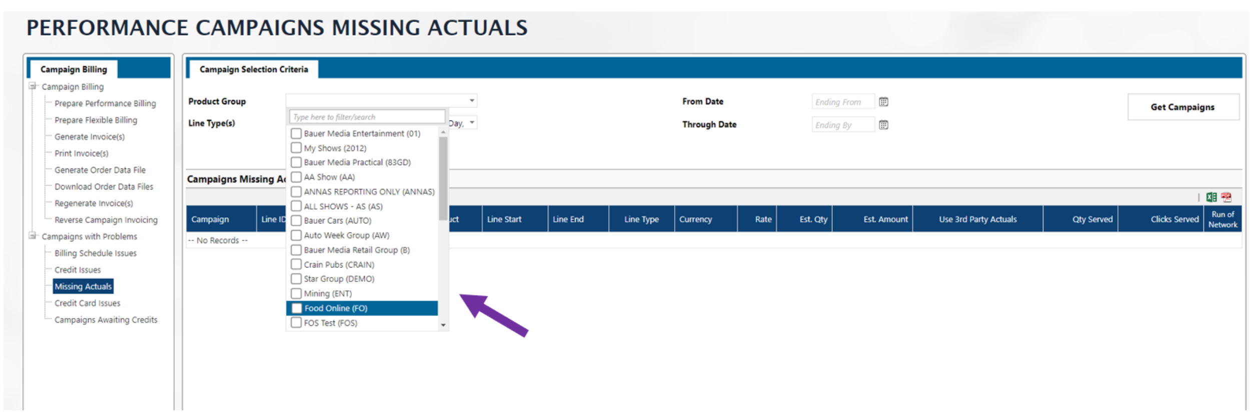
Better Support for changing Agency Commission Amounts

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.



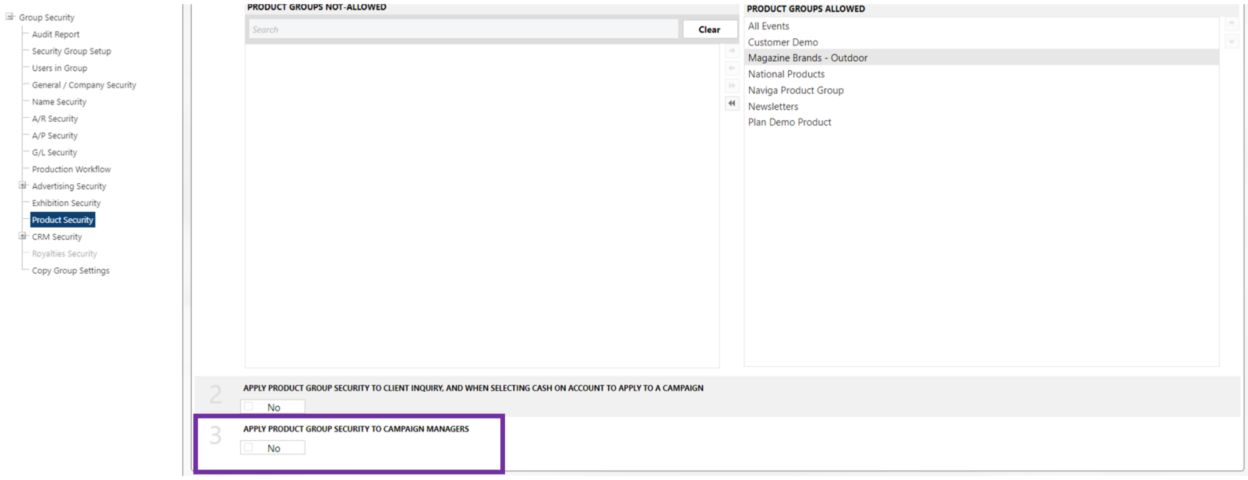
Product Group Multi-Select in Billing

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.



Group Security Change - Product Security

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



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.

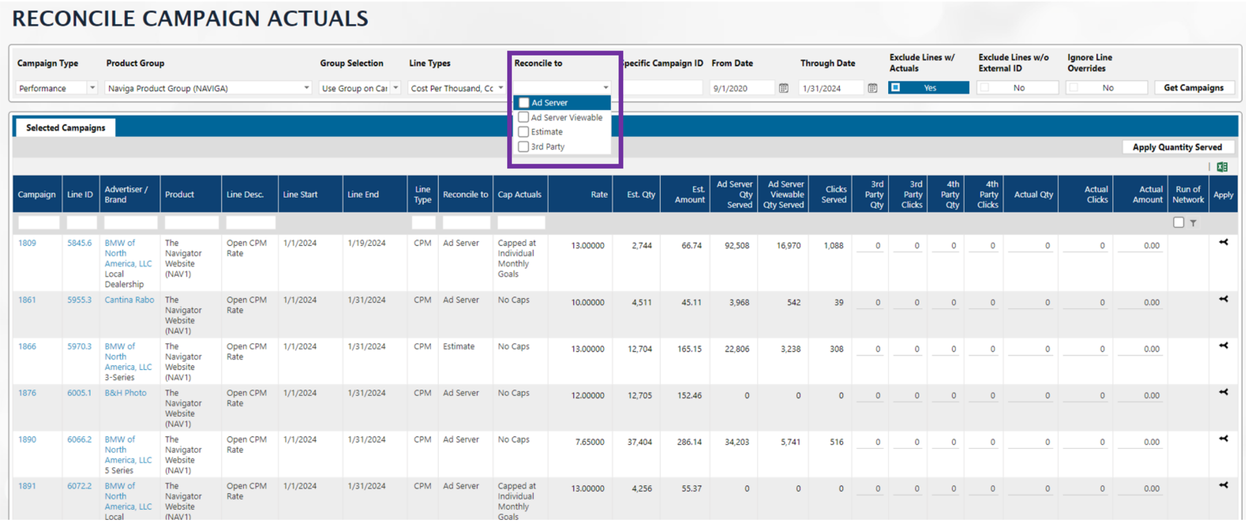
Excel Download on Reports

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

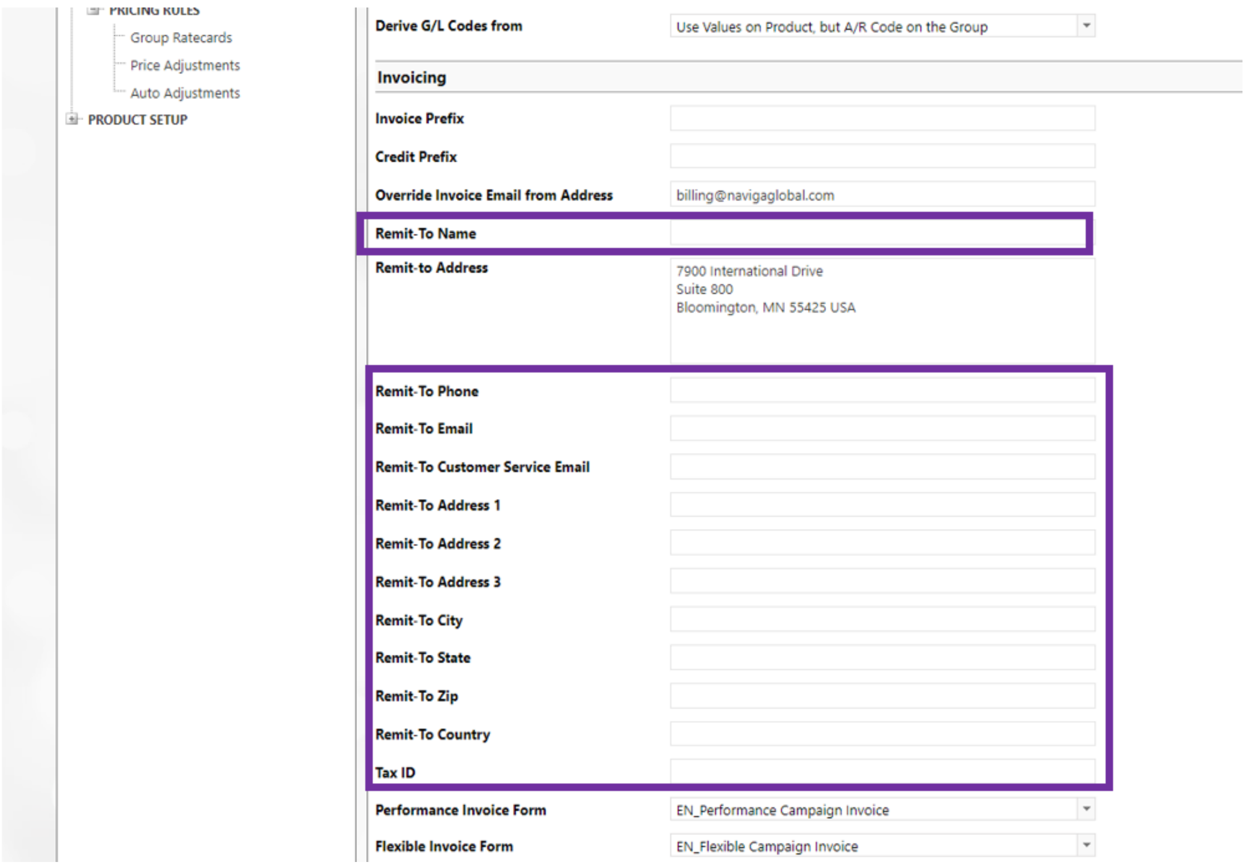
New Filter on Reconcile Digital Actuals

Users will now fine 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.



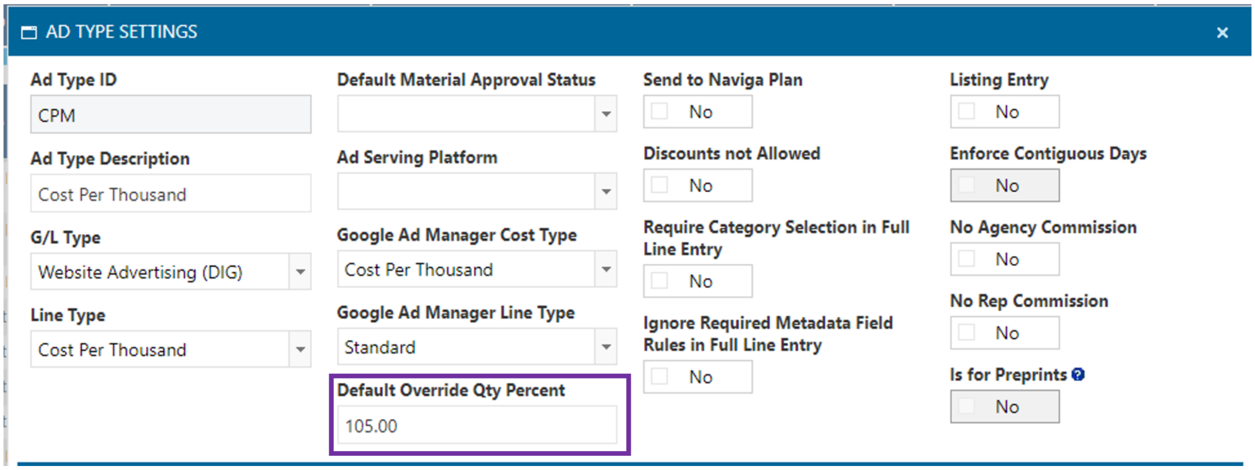
New fields on Product Group

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.

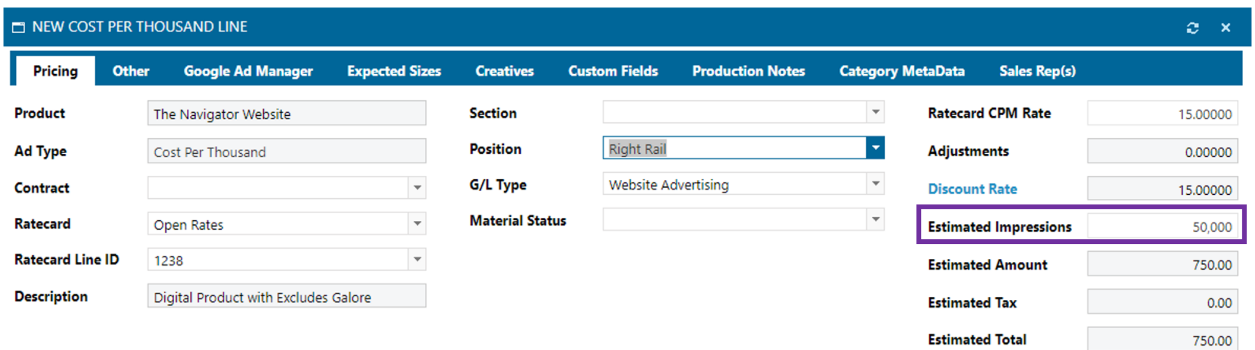


Default GAM Override % on Ad Type

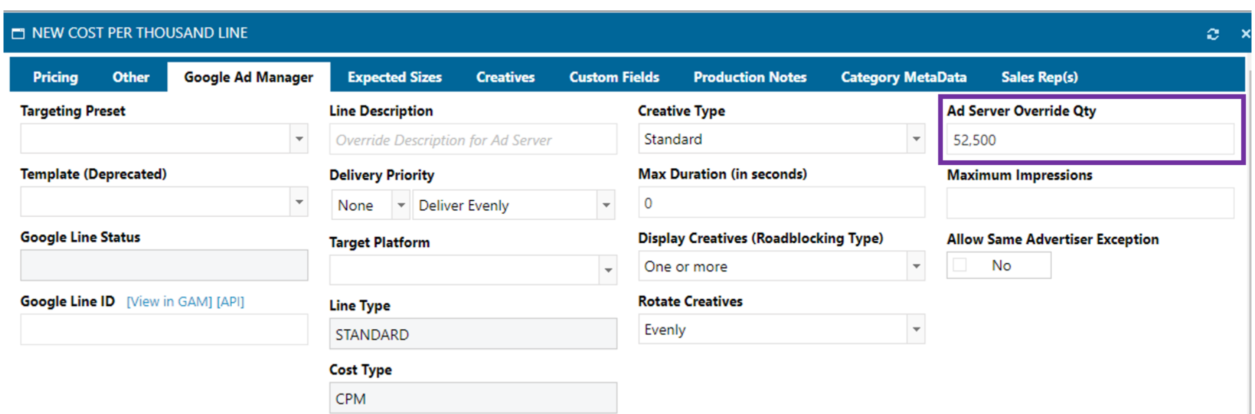
On the Ad Type setup, you can now set a default Override % which will multiply the Impressions on the campaign by this % to set the "Ad Server Override Qty" on the Google Ad Manager Tab. Ad an example, I wanted to send google 5% HIGHER quantity than whatever the customer ordered to ensure that I always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



Here is my order:



and the GAM Tab:

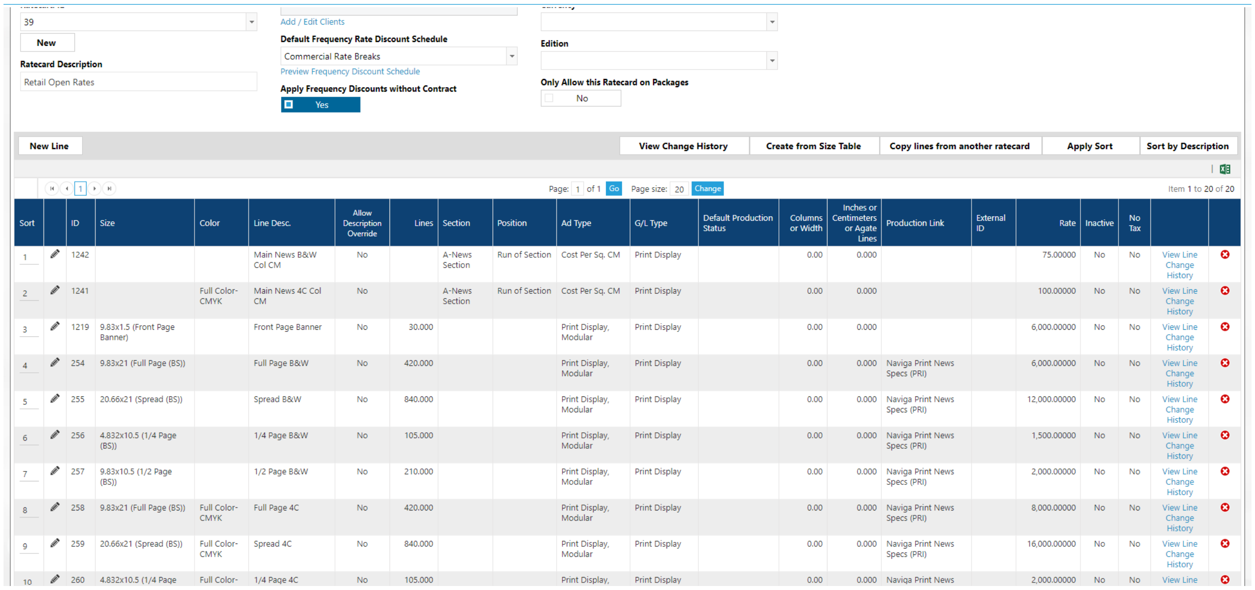


Note for Quick Line Entry Users: There is also a quantity override on the GAM tab on Ratecard line setup. When booking by Quick Line Entry, the Ratecard line setup will override the ad type default. In Full line entry, the Ratecard setup will only be used if there is no Ad Type default. So, slightly 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:

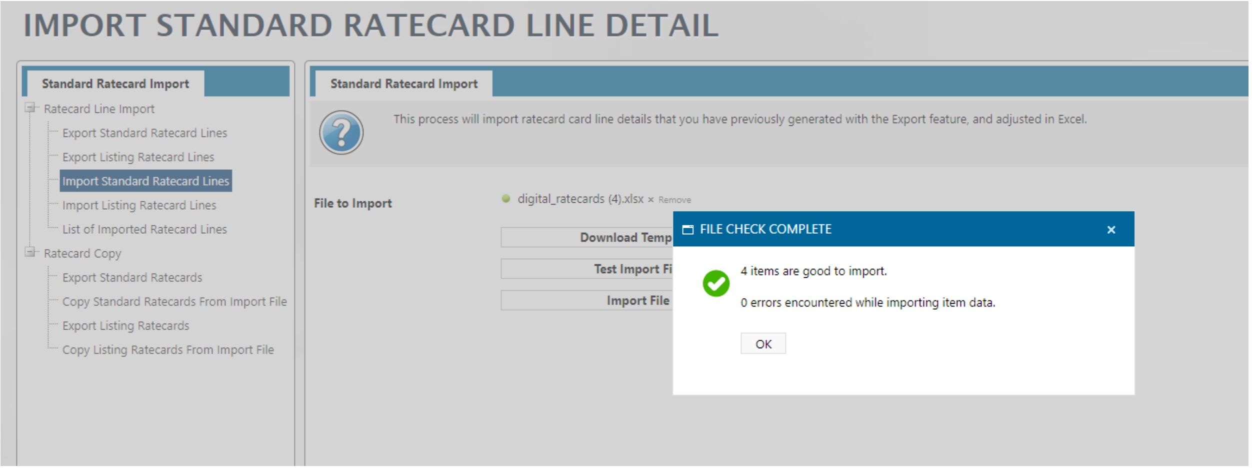


Sort		ID	Size	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns or Width	Inches or Centimeters or Agate Lines	Production Link	External ID	Rate	Inactive	No Tax		
1		1242			Main News B&W Col CM	No		A-News Section	Run of Section	Cost Per 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 (PRI)		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 (PRI)		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 (PRI)		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 (PRI)		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 (PRI)		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 (PRI)		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	

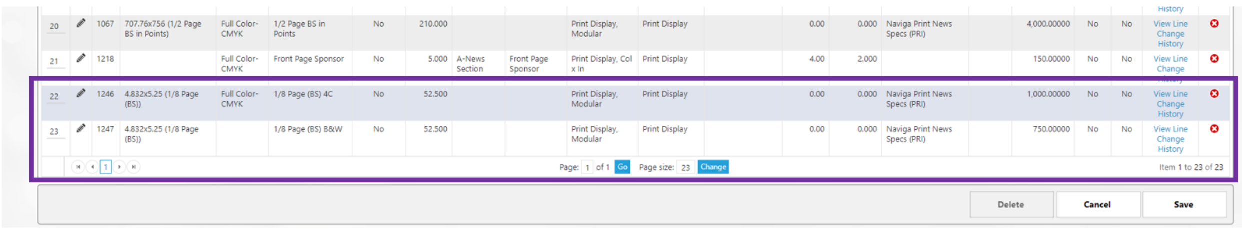
I have Ratecard ID #39, which has several modular sizes, but I didn't previously offer a 1/8th page rate. Perhaps I want to start allowing for a 1/8 Page B&W and an 1/8 Page Color rate for this ratecard and several other ratecards in my other products. It would be a bit cumbersome to open all the affected ratecards on several products 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 D	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:

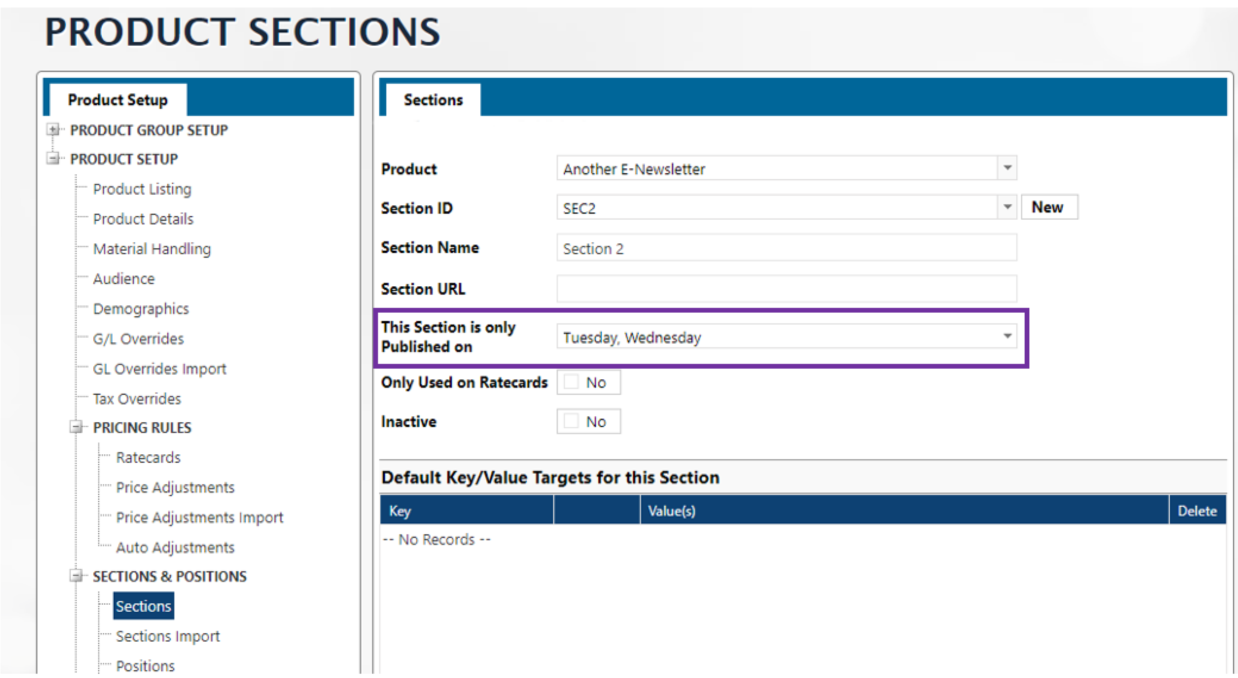


When I now re-open ratecard #39, I see the two new 1/8 Page sizes have been appended to the list of rates:

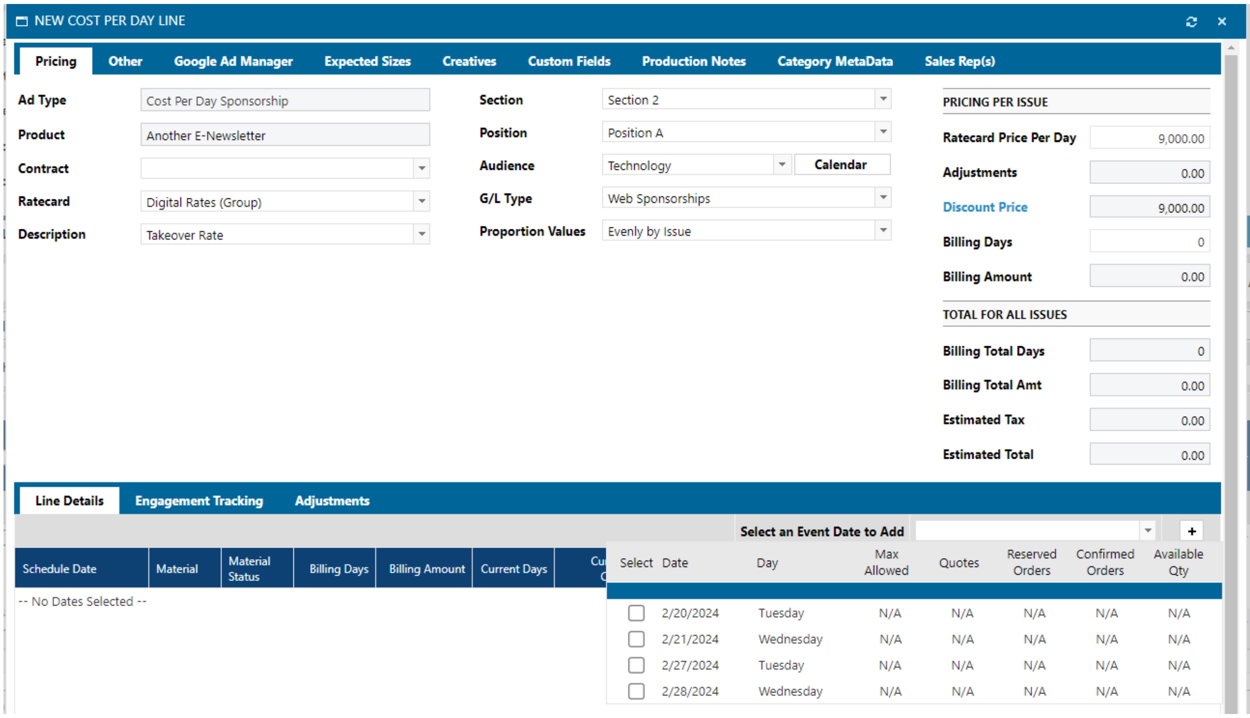


Day of Week Sections for Newsletters/Date-based Digital Products

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:

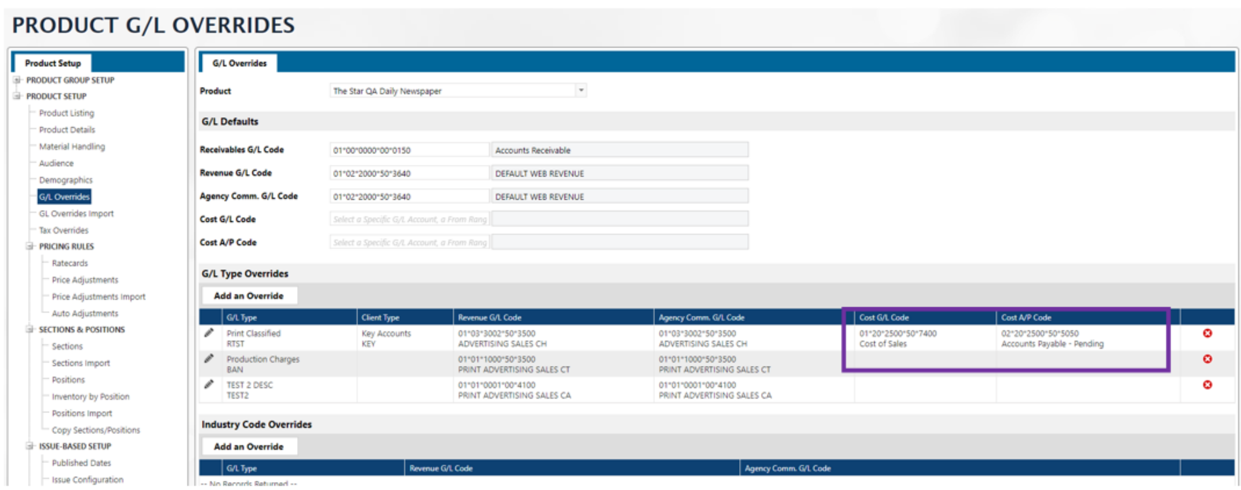


After setting the sections for the desired days of week, in order entry, the available run dates will be filtered for those day(s) of week.



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

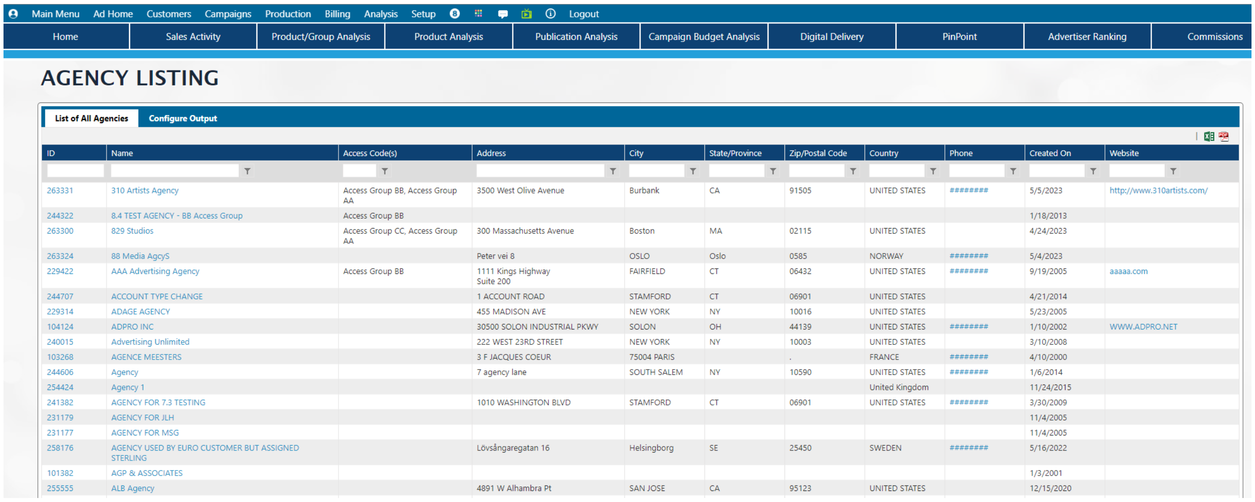
The following fields have been added to the G/L Override import in Product Setup:



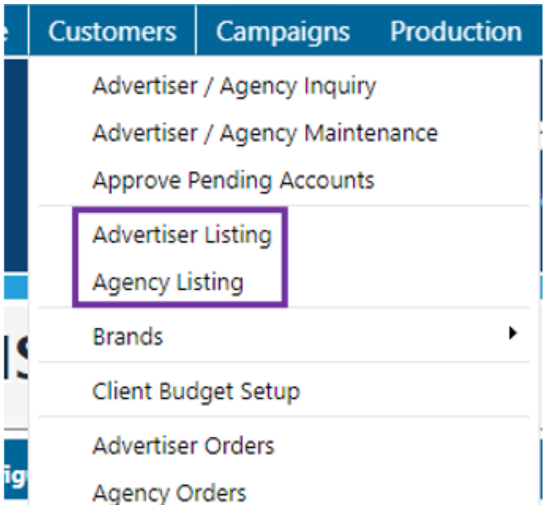
Field Name	Example	Conditions	Mandatory/ Optional
Cost GL Code	01*20*2500*50*7400	This is the G/L code associated with the cost if using Cost Rates. Must match G/L code already in the system.	Optional
Cost AP GL Code	02*20*2500*50*5050	This is the G/L code associated with the pending AP if using Cost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

Advertiser and Agency Reports Configurable Columns

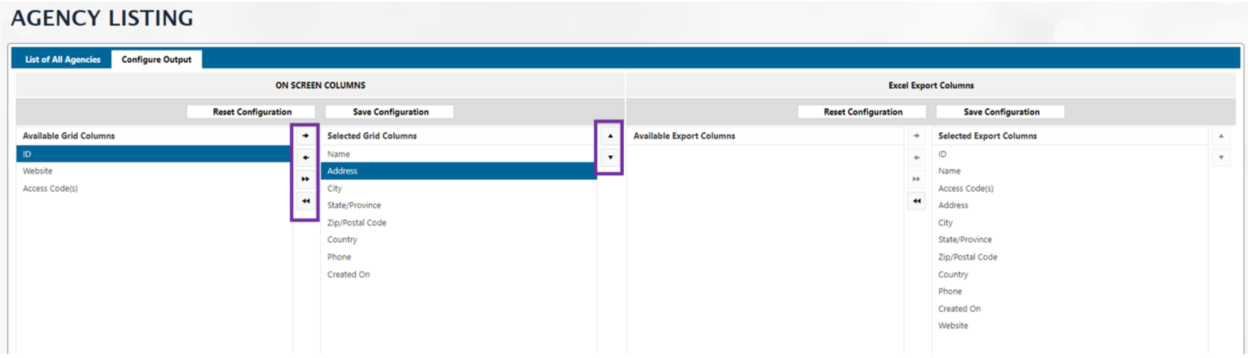
Two additional reports are now allowing for configurable columns: Advertiser Listing and Agency Listing:



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



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 simiply drag and drop to the desired position. Repeat for both the on screen columns and the excel export columns.

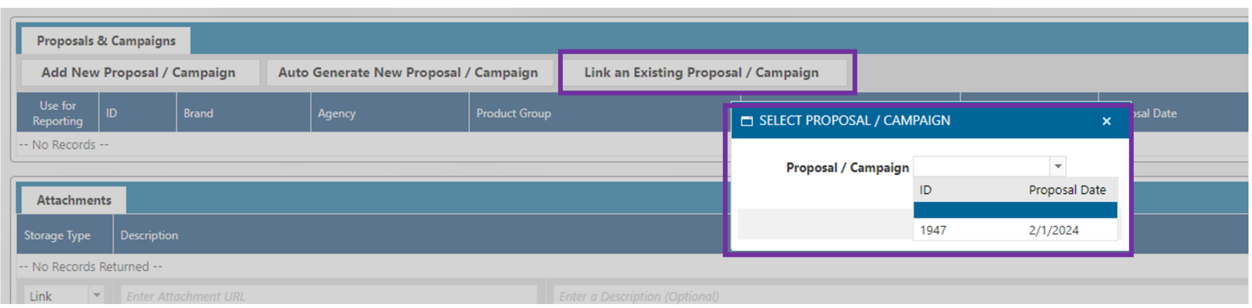


CRM Module

Opportunity Linked Proposals

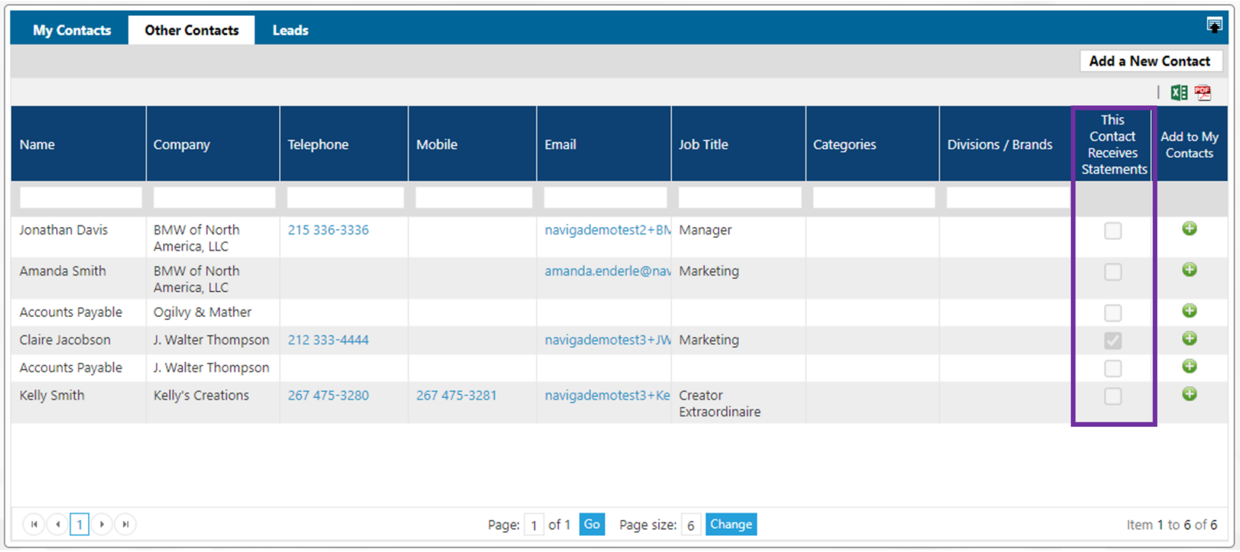
There was a small mod made to opportunities to allow for better performance. Previously, in the proposals and campaigns section there was a dropdown of existing proposals the user could select and link to an opportunity. It isn't a frequently used feature as generally the proposal is generated *from* 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.



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.



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+BN	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

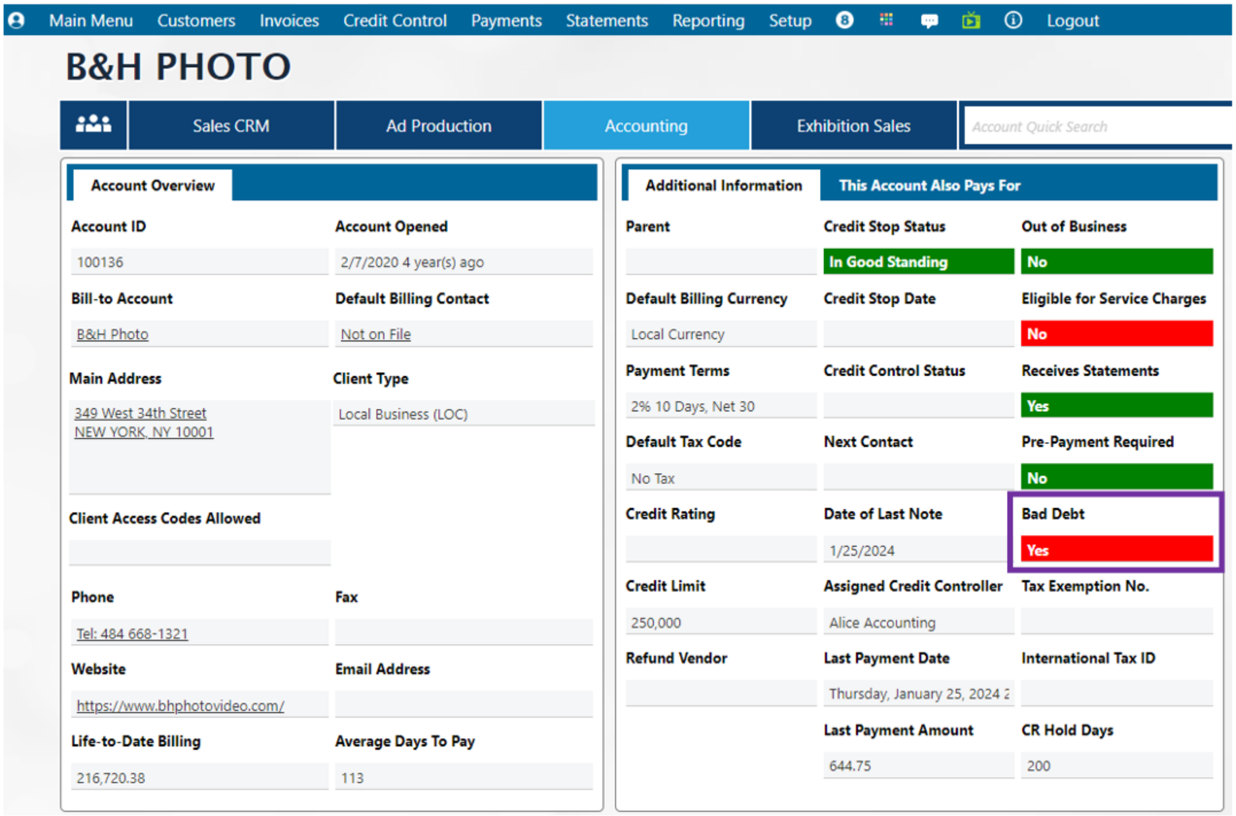
I don't generally put bug fixes in the release guide for new features, but this one seemed like a big one that folks would want to know about since it is a behavior change to the system. Previously when a contact was created in CRM, but then opened and edited in the Ad Module, it was turning that contact 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.

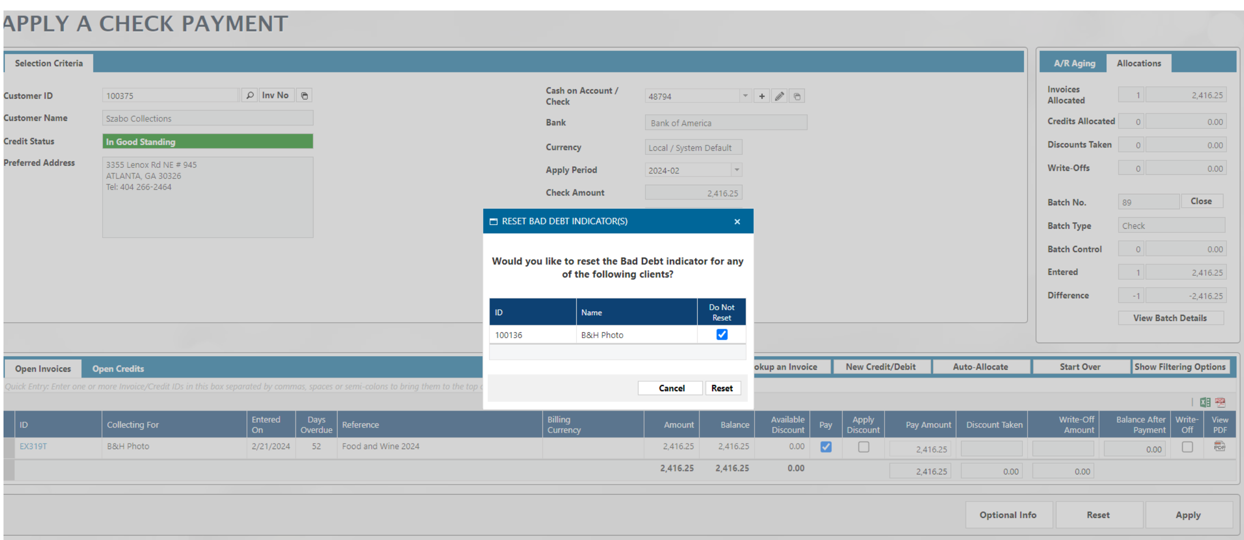
Accounts Receivable Module

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



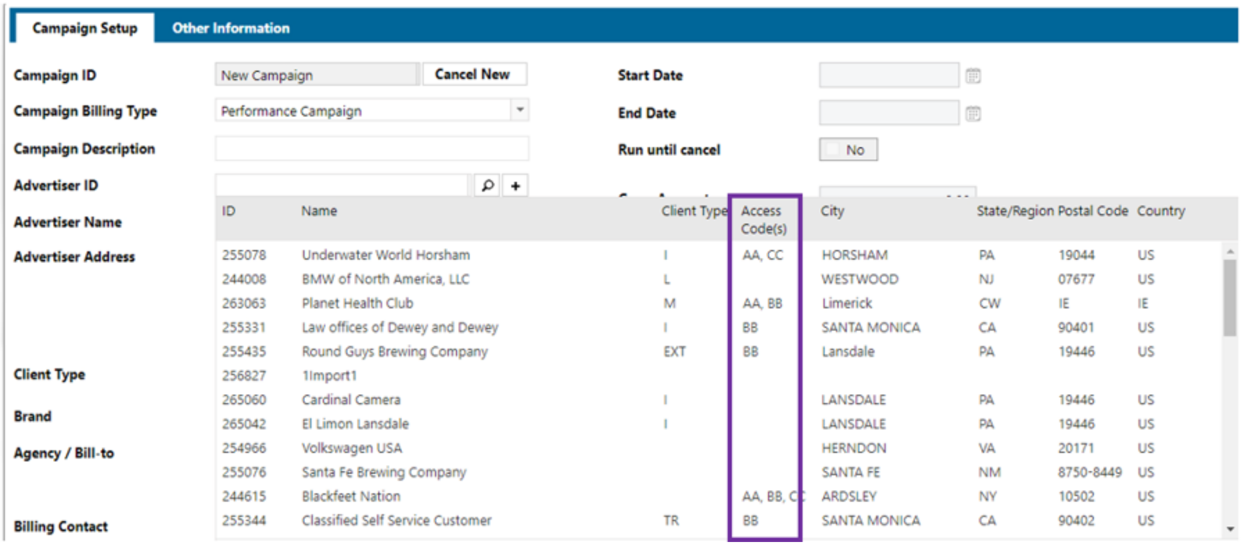
When the written off invoice has been paid, the user will be prompted in cash receipts if they would like to remove the bad debt indicator on the customer account:



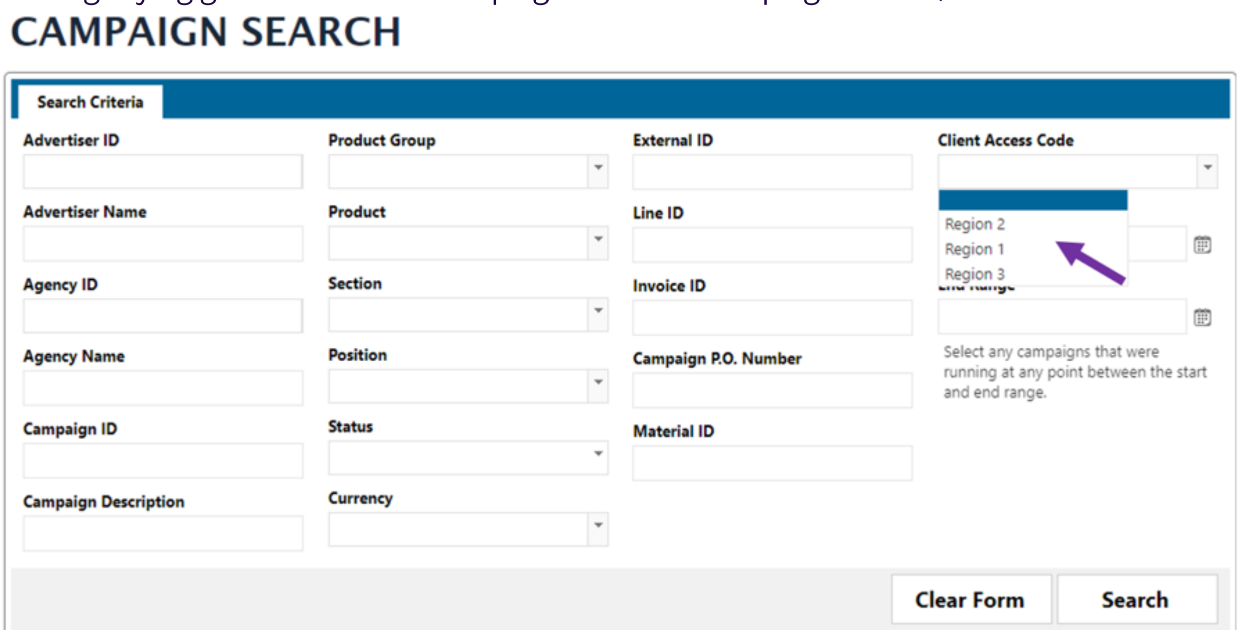
More visibility for Client Access Codes

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:

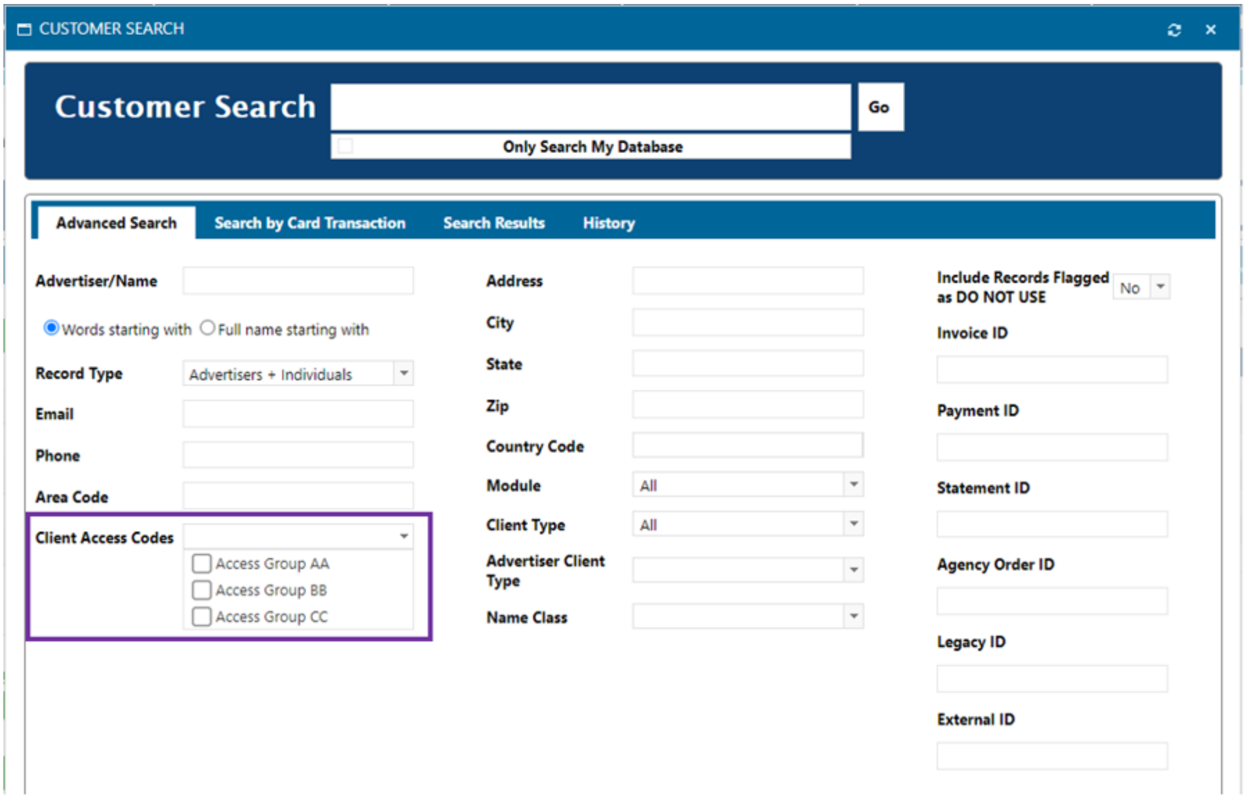
1. The dropdown name search in Order Entry:



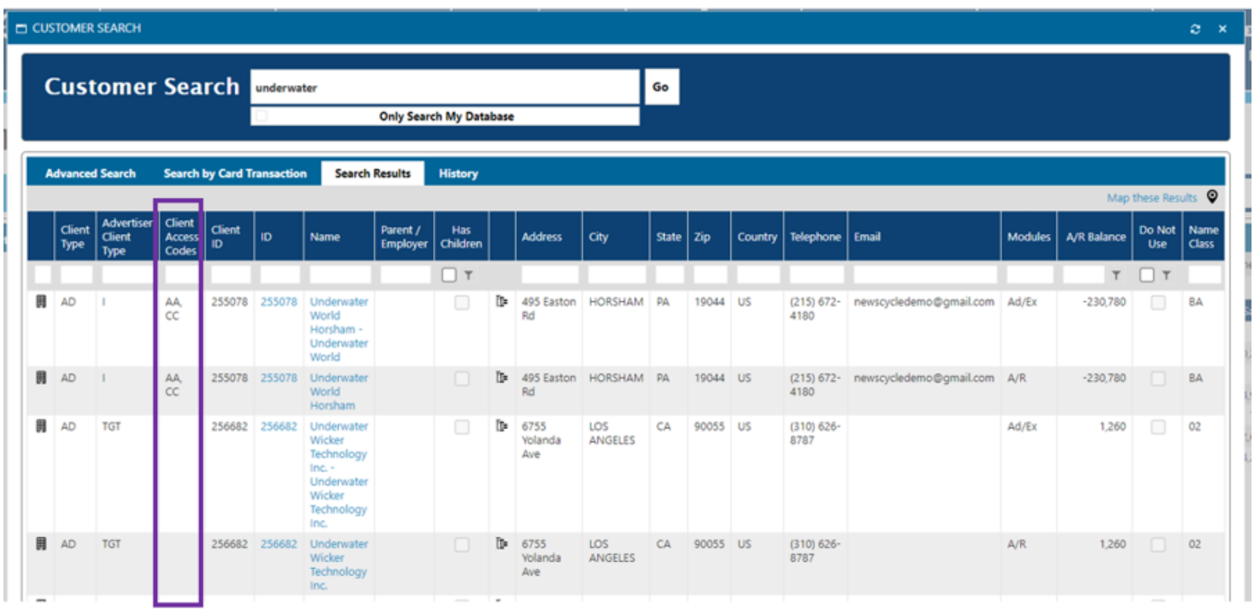
2. Campaign Inquiry Screen (accessed from either **Campaigns -> Campaign Inquiry** or the magnifying glass next to the Campaign ID on the Campaign Header):



3. The Customer Search criteria:

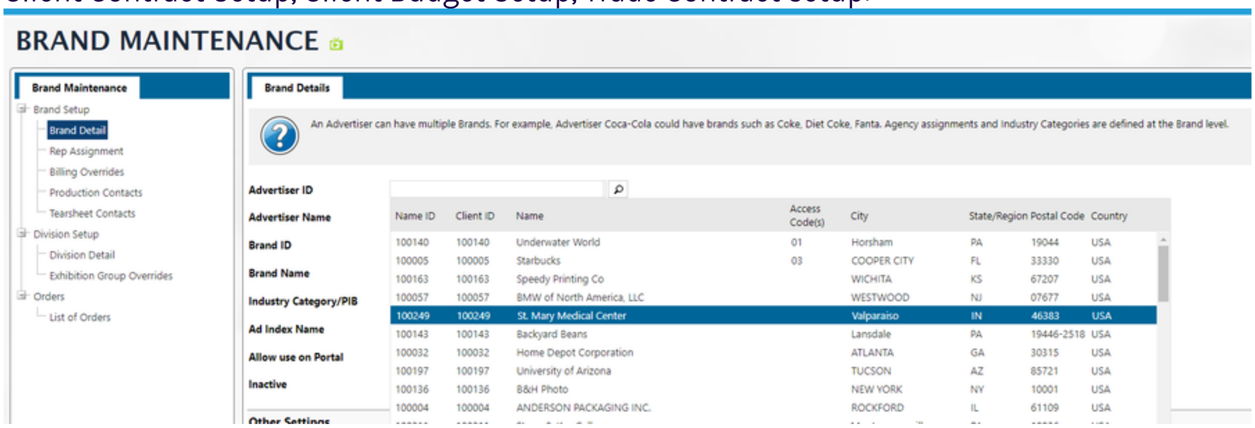


4. The search results tab for customer searches:

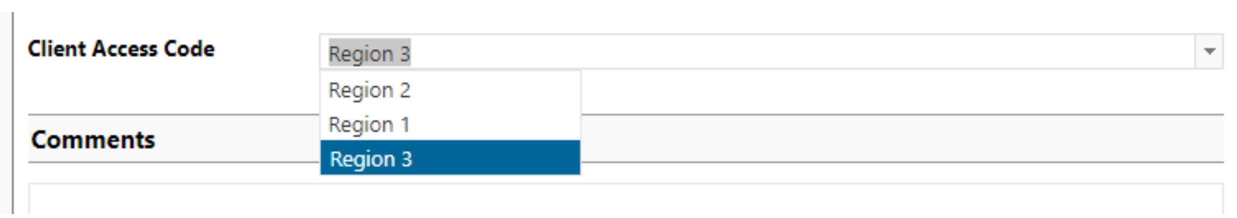


5. The Client Overview Screen, A/R Tab:

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

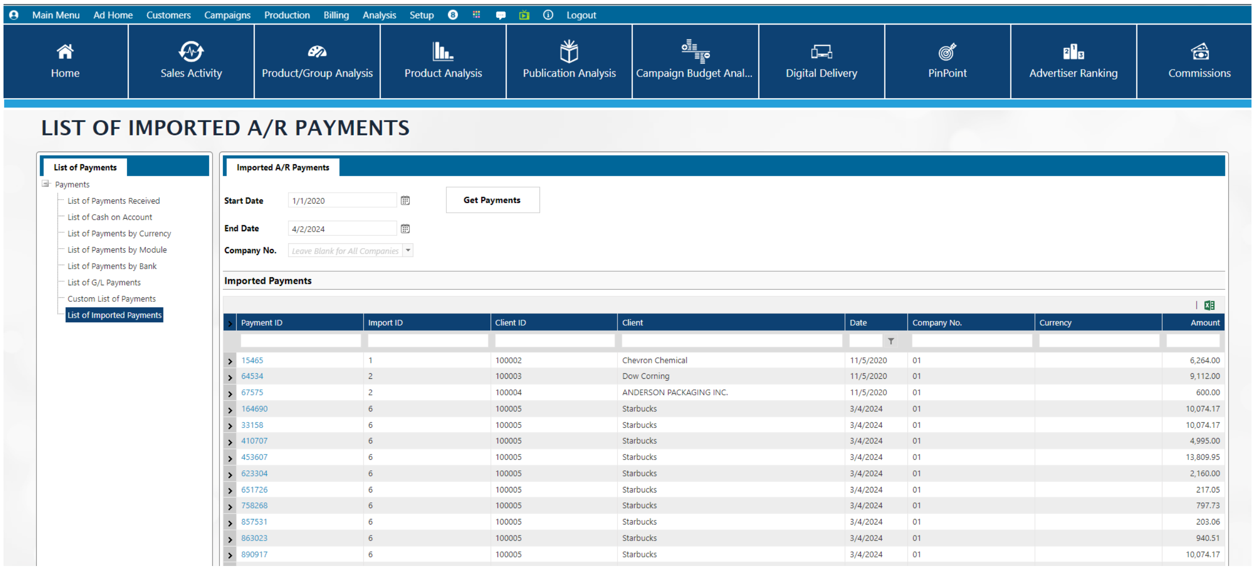


Also related to access codes. The 2024.1 release added an option to make this field a single value field instead of the existing multi-valued field. Only Naviga Personnel can set the flag to use Access Codes or to make it a single-value field instead of the default, multi-valued. If the flag is set for 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.



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.



Main Menu | Ad Home | Customers | Campaigns | Production | Billing | Analysis | Setup | Logout

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

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

End Date 4/2/2024

Company No. Leave Blank for All Companies

Get Payments

Imported Payments

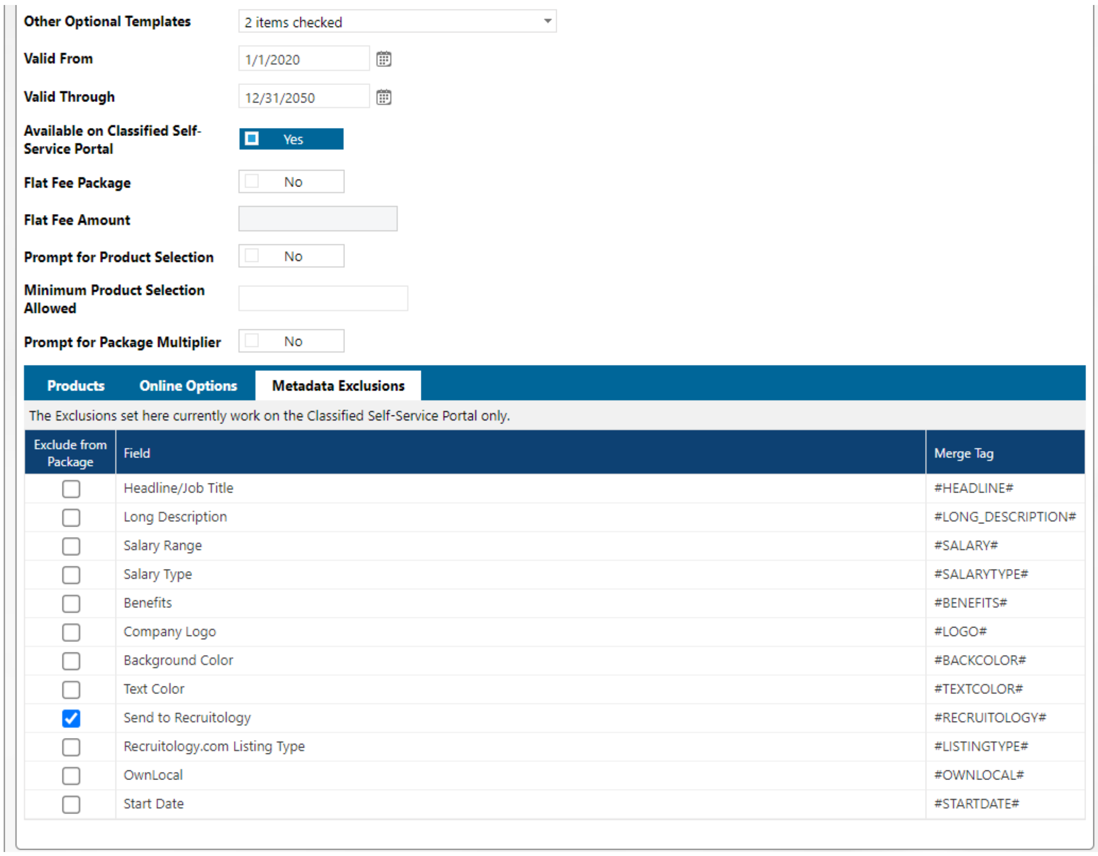
Payment ID	Import ID	Client ID	Client	Date	Company No.	Currency	Amount
15465	1	100002	Chevron Chemical	11/5/2020	01		6,264.00
64534	2	100003	Dow Corning	11/5/2020	01		9,112.00
67575	2	100004	ANDERSON PACKAGING INC.	11/5/2020	01		600.00
164690	6	100005	Starbucks	3/4/2024	01		10,074.17
33158	6	100005	Starbucks	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
890917	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.

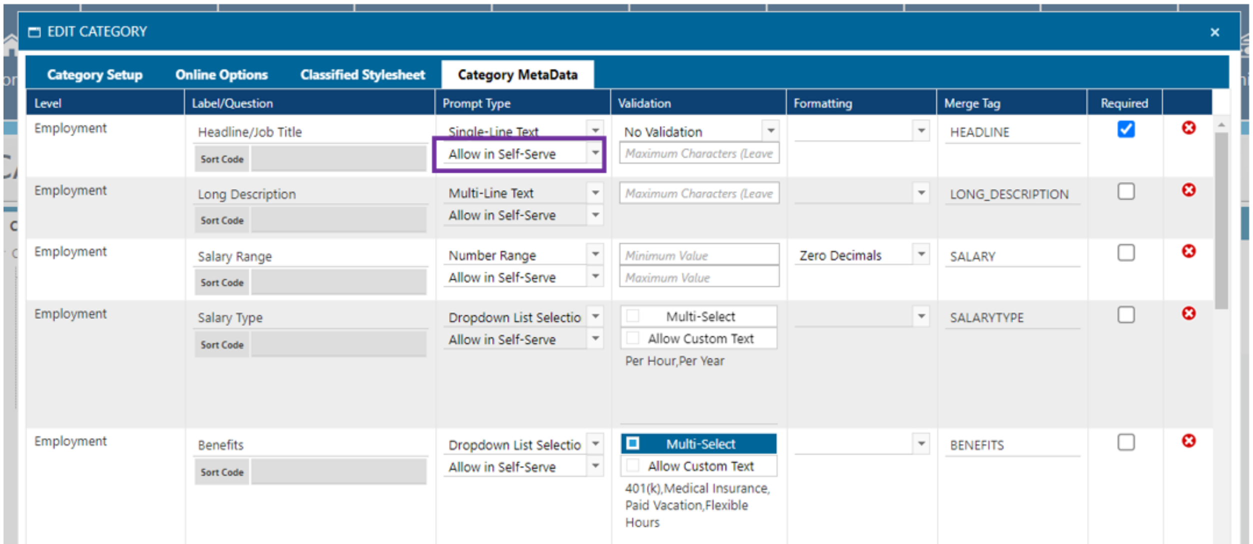
To configure this, first navigate to **Setup -> Classified Order Setup -> Classified Package Setup**. The bottom section of Classified Package setup now has a new tab called Metadata Exclusions.



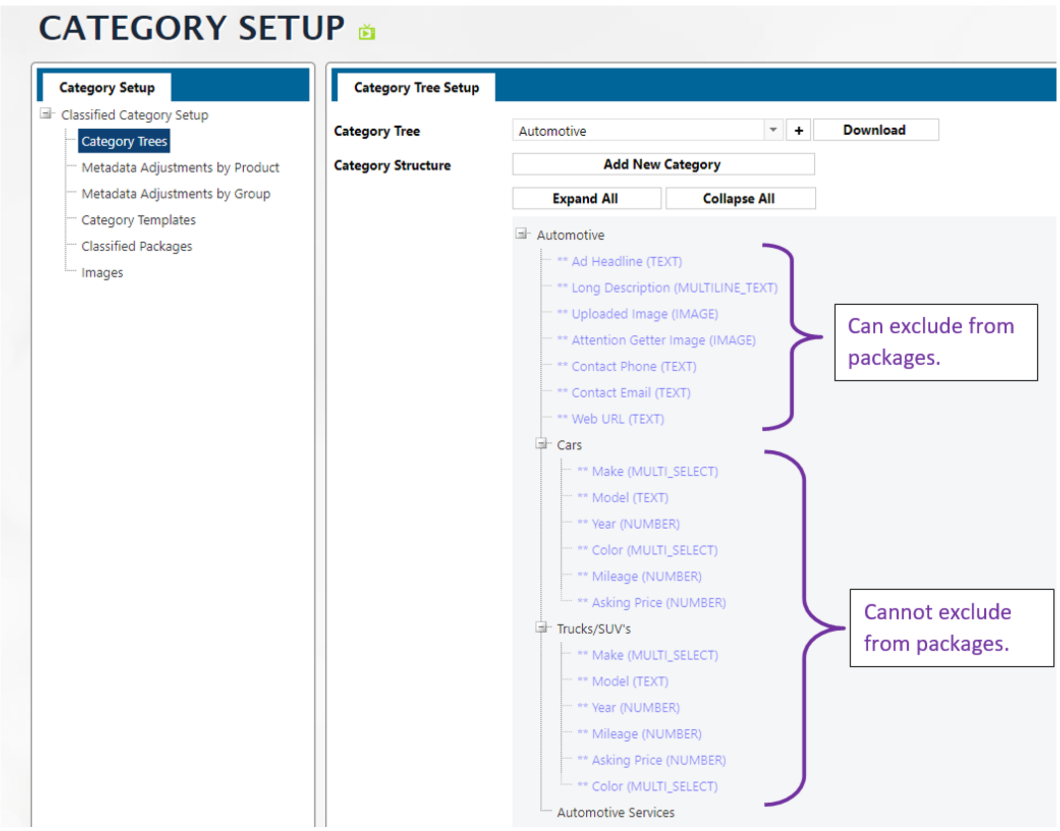
Then, for any items you wish to hide from the user for this package, check the column Exclude from Package. Save the package.

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.



- 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.



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