

New Features for 2023.5

2023.5 New Features

2023.5 was a HUGE release, with several big, complex new features. Most releases I have the new features just in a big long list on a single page. This time, I made a whole new document with several pages to better describe each new feature. See below for links to the big ones, and then some smaller mods are together on the "Other 2023.5 Mods" page.

Click [HERE](#) to get back to the main documentation site.

[ACH Processing](#)  **UpVote**

[Affidavit Automation](#)

[Material Deadlines by Artwork Type](#)

[Dynamic Classified Portal Packages](#)

[Email Integration Monitor](#)

[GAM - Import/Export Ratecards](#)  **UpVote**

[AND MORE!!](#)

[Pre-Release info about a 23.6 Feature](#)

ACH Processing

 **UpVote** Depending upon your payment processor, ACH may now be supported for payment processing in Naviga Ad, both for internal users, and for Advertiser Portal Users (Note - Classified Self-Service is still currently credit card only, but may be considered for a future release). The processors which currently support ACH transaction processing with Naviga Pay are **Authorize.net, Braintree, ImpressPay (aka FluidPay or AMR), and Edgil Payway**. Stripe is in the works with the NavigaPay dev team and will be coming early 2024.

Important Notes -

- When upgrading to this version from a version prior to 2023.5 - and you are using one of the above processors who now allow for ACH - **please put in a support ticket** to let us know when you are upgrading. There may be a small change we need to make in the back end so that payment processing continues to work without interruption.
- There were a couple of reports of banks not showing up on the payment screen after upgrading. If this happens to you, try going to Setup → System Tables Setup → Bank Setup and just selecting the bank and resaving it.
- When Processing ACH Transactions, we do get an immediate response back that the Routing and Account numbers were valid, but there could be issues downstream that cause the transaction to ultimately be rejected. We do not get an automatic reversal on this from the payment processor, so you will still need to reconcile the deposits with your bank to ensure that the payment ended up posted to your bank account. Similar to a check bouncing - if an ACH gets rejected downstream, the payment will need to be reversed manually by returning the check.

Internal Experience

Process Payment Screen

This screen is displayed in Campaign Payment Entry and A/R Invoice Payments. If ACH is enabled for your bank, you will see the "ACH" option in the dropdown for payment type. The below screen is displayed if the user enters a payment by navigating to any of the following:

- A/R module → Payments → Pay an Invoice
- A/R module → Payments → Prepay an Order
- Advertising module → Campaigns → Edit a Campaign, Invoices & Payments node

The screenshot shows the 'PROCESS PAYMENT' window. At the top, there is a blue header bar with the title 'PROCESS PAYMENT'. Below the header, there is a red icon of a credit card and a grey box with the text 'ATTENTION This client has NOT authorized Pre-Payment via Credit Card.'.

On the left side, there are four input fields for payment details:

- Amount to Pay:** 650.20
- Processing Fee:** 25.94
- Total Charge:** 676.14
- Bill-To Client:** Law offices of Dewey and Dewey

On the right side, there is a 'Payment Type' dropdown menu. The dropdown is open, showing the following options: Credit/Debit Card, Trade, Credit/Debit Card, Check, Cash, ACH (highlighted with a purple box), Apply Credit, Electronic Transfer, and BACS Transfer. To the right of the dropdown, there are 'Edit' and 'New' buttons. Below the dropdown, there is an 'Account Type' input field.

ACH will only be displayed if at least one bank is setup to support ACH, and only those banks supporting ACH will be displayed in the bank dropdown. Labels have been changed onscreen to be applicable to both ACH and Credit cards. So "Credit Card to Charge" has been relabeled "Account to Charge." "Card Number" is now "Account Number", etc.

- Note** - if you do not see ACH as an option in the dropdown, check Advertising Group Security. There is a setting there to limit the payment types that are available to a user. If you previously set limitations, you will need to also select ACH to allow that to be selected.

22
23
24

ALLOWED PAYMENT TYPES

- ☐ Credit Card
- ☐ New Check
- ☐ Electronic Transfer
- ☐ BACS Transfer
- ☐ Cash on Account
- ☐ Apply Credit
- ☐ Write-Off
- ☐ Cash
- ☒ ACH

I are allowed. NOTE: Even if allowed - some of t

EN PAYING BY CHECK

erpayment on campaign pre-payments - where

CURRENCY ON A NEW CAMPAIGN

bill in a certain currency, the currency will defau

If you still do not see ACH as an option, there is a new flag in bank setup where you can force ACH to appear as an option - but only use that flag if you are using one of the above listed processors. You wouldn't want users to see ACH in the dropdown if it isn't going to be functional for them.

Override: The Linked Gateway Supports ACH Payments

☐ No

Only set this flag if you have confirmed the Gateway in use supports ACH processing. Check with Naviga Ad support if you are unsure.

The popup displayed when user clicks "new" to add a new account will differ slightly depending upon the processor being used, but typically, the Account number, Routing Number, and Account type will be displayed -

Create a Payment Profile

Account Number

Please fill out the account number field

Routing Number

Please fill out the routing number field

Account Type

☐ checking
☐ savings
☐ none

First Name

Please fill out the first name field

Last Name

Please fill out the last name field

[Scroll to Top](#)

This will be saved as an account on file and will behave much like a credit card in that the masked account number can be viewed and selected to be used for transactions.

- ❗ Important note for Auth.net users - when the processor is in testing mode, ACH transactions will fail if the amount is > \$100, so be sure to use small amounts if in test mode. See https://developer.authorize.net/hello_world/testing_guide.html for Authorize.net testing guide.

Auto-Pay on Campaign

Similar function, but slightly different user experience, on the Campaign Header, if there is an account on file, a bank account now can be selected as an AutoPay method from the Auto Pay Dropdown:

EDITING CAMPAIGN 14131

Campaign Setup

Campaign ID: 14131

Campaign Billing Type: Performance Campaign

Campaign Description: Material Management

Advertiser ID: 264856

Advertiser Name: Indian Valley Scuba

Advertiser Address: 601 Yoder Road, HARLEYSVILLE, PA 19438, Tel: (215) 356-6000

Client Type: Local (I)

Brand: Indian Valley Scuba

Agency / Bill to: (264856) Indian Valley Scuba

Billing Contact: View Credit Status

Billing Address: 601 Yoder Road, HARLEYSVILLE, PA 19438, Tel: (215) 356-6000

Other Information

Start Date: 10/25/2023

End Date: 11/30/2023

Run until cancel: No

Gross Amount: 1,500.00

Commission Amount: 0.00

Net Amount: 1,500.00

Estimated Tax: 75.00

Estimated Total: 1,575.00

Currency: Use System Default

Default Discount %: 0.00

Auto Payment Method

Card Type	Card No.	Expire Date	Description
Checking	*****0000		BANK AMERICA - NavPay: Payway Edgit
VISA	411111*****1111	12/2028	LASALLE BANK - NavPay Braintree
BankPay Service	XXXXXX0000		LASALLE BANK - NavPay Braintree

The auto pay function is not new, but having Bank Accounts available in that list is new. Previously, only credit cards were in that dropdown. Whatever account is selected in the dropdown will be used to pay the invoice during the invoice creation process.

- ❗ NOTE: For those who are electing to license Naviga Ad's Variable Payment by Payment Type module, if you are charging processing fees for Card transactions (or ACH Transactions) the Auto-pay Campaign process will NOT YET charge those fees for these transactions.

Auto-Clear Processing

And finally, one additional place that ACH is now supported is in the monthly Auto-Clear processing.

A/R Details

Main Address ID: 280018

Address: Well Crafted Beer Co. Lansdale Brewpub
310 Madison Street
Lansdale, PA 19446
Tel: (267) 263-2777

Account Type: Advertiser

Client Group(s):

On Credit Stop: ☐ No ☒ In Good Standing

Account Approval Status: Approved by Kelly Smith (USER KSMITH) on Tuesday, March 7, 2023

Approve Account

Credit Stop Date:

Account Opened: 3/7/2023

Last Updated: 10/30/2023

Allow generation of collection letters: ☐ No

Auto-Clear Balance

Card Type	Card No.	Expire Date	Description
VISA	411111*****1111	12/2025	BANK AMERICA - NavPay: Payway Edgil

Client Access Codes

Savings	*****0000	BANK AMERICA - NavPay: Payway Edgil
---------	-----------	-------------------------------------

Navigate to **Customers → Advertiser/Agency Maintenance** in Advertising Module or **Customers → Name Maintenance** in the A/R Module and select the A/R Setup node. The Auto-clear balance dropdown will now contain both card numbers and bank account numbers for selection for the monthly charge.

ⓘ NOTE: For those who are electing to license Naviga Ad's Variable Payment by Payment Type module, if you are charging processing fees for Card transactions (or ACH Transactions) the Auto-clear process will now also charge those fees for these transactions.

Advertiser Portal Experience

In the Advertiser Portal, the customer user's invoice and campaign payment experience will be dependent upon whether or not processing fees are enabled and whether or not ACH is enabled.

To show the different user experiences to be expected in the Portal, I will show different portal activities, each with three different scenarios:

1. Fees are not enabled, and the bank is NOT set up for ACH (this method is the behavior that was available in prior releases)
2. Fees are not enabled, and the bank IS set up for ACH
3. Fees are enabled, and the bank IS set up for ACH

i IMPORTANT - IF you are using the Advertiser Portal, AND you are charging credit card fees, you MUST have ACH enabled on your bank. You cannot charge credit card fees without giving the client the option to pay with their bank account (ACH) without fees.

Pay invoices as a logged in user

Scenario #1 - No Fees, No ACH

This scenario will be familiar if you are already using the portal since it is the same as how the system behaved in prior releases. When looking at the Invoices tab, user sees the Aging at the top of the screen and when they click on Show invoice options, the screen will change and user can select which invoices, and how much, they would like to pay. Demo below walks you through the process (For best results view in full screen by clicking the  in the top right corner):

Portal Invoice payment No Fees, No ACH

Specials Invoices Orders Proposals Materials Forms

Open Invoices | Paid Invoices

All Amounts Owed

0 - 30 days	31 - 60 days	61 - 90 days	91 - 120 days	over 120 days	Total
63,396.62	79,229.12	21,673.94	49,640.85	0.00	213,940.53

Open Invoices

Show Invoice Payment

Notes	Invoice No.	Reference	Date	Invoice Amount	Tax	Balance
Company: Company B						
	IN5511T	Customer Demo - Creative Types	6/30/2023	243.90	0.00	243.90
	IN5623T	Customer Demo - Creative Types	7/31/2023	252.03	0.00	252.03
	IN5727T	Customer Demo - Creative Types	8/31/2023	252.04	0.00	252.04

Scenario #2- No Fees, with ACH

Same screen as above, but this system has enabled ACH in their Bank processor. (They also added the option to display COA and Pre-payments in the aging, but that is related to portal setup and not relevant to the Fees/ACH discussion). When User clicks on the Show Invoice payment options button they will first be presented with an option to pay with cash (ACH) or pay with credit (credit/debit card). Demo below walks you through the process for paying with each method. For best results view in full screen by clicking the  in the top right corner

→

Paying Invoices No Fees, With ACH

↺

Specials

Invoices

Orders

Proposals

Materials

Forms

Open Invoices | Paid Invoices

Advertiser Filter: Round Guys Brewing Company

All Amounts Owed

0 - 30 days	31 - 60 days	61 - 90 days	91 - 120 days	over 120 days	Total	Cash on Account	Pre-Payments	Balance
1,337.52	323.39	563.39	0.00	0.00	2,224.30	-2,000.00	0.00	224.30

Open Invoices

Show Invoice Payment C

	Notes	Invoice No.	Advertiser	Brand	Reference	Date	Invoice Amount	Tax	Balance
		ABC1521042T	Round Guys Brewing Company	Round Guys Brewing Company	ABC - Kelly's Co. - New Long Running Ad for Plan	8/22/2023	469.49	93.90	563.39

Scenario #3 - With Fees, with ACH

Same workflow as above, but this system has enabled Fees in A/R system settings, and has ACH in their Bank processor. In this workflow, there is no aging totals at the top, because the amounts will differ based on payment method, which might confuse the user. When User clicks on the Show Invoice payment options button they will first be presented with an option to pay with cash (ACH) or pay with credit (credit/debit card). Demo below walks you through the process for paying with each method. For best results view in full screen by clicking the  in the top right corner.

Portal User paying Invoice w/Fees & ACH

You are logged in as: **Underwater World Horsham**
[Account Settings](#) | [Logout](#)

Messages | Specials | Invoices | Orders | Proposals | Materials | Settings | View My Reports

Specials | Invoices | Orders | Proposals | Materials | Forms

Open Invoices | Paid Invoices

Open Invoices

Show Invoice Payment Options

	Notes	Invoice No.	Reference	Date	Cash Balance	Credit Card Balance
		ABC1521275T	ABC - Kelly's Co. - P.O. 222333	10/1/2023	28,854.56	30,005.86
		2967.CC.REF.1		10/6/2023	-82.20	-82.20
		ABC1521174T	ABC - Kelly's Co. - P.O. 222333	10/12/2023	39,377.00	40,948.14
		ABC1521268T	ABC - Kelly's Co. - P.O. 222333	10/17/2023	13,850.00	14,402.62
		DEM1521270T	Demo Group - test for integration	10/17/2023	7,326.15	7,618.46

IMPORTANT - if you are using the "Individuals with Portal Access" functionality (set up via Setup → Portal Setup → Individuals with Portal Access) - we have temporarily turned off the ability to pay in the portal. This functionality will be brought back in 2024, but it needed to be re-worked to support all the new payment features and wasn't working as expected in 2023 software so it is disabled for the time being to avoid customer confusion. They will still be able to see their invoices and download copies, but they will not be able to pay in the portal.

Pay invoices without logging in via a pay link from Naviga Ad User

Scenario #1 - No Fees, No ACH

→

Invoice Paylink without Fees or ACH

↺

ManagerHomeLeadsCustomersOpportunitiesRep SummaryAdvertisingExhibitionsSetupLogout

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

PAYMENT

255435Inv NoSub

Round Guys Brewing Company

In Good Standing

South Wood Street
Lansdale, PA 19446
Tel: (215) 368-2640

Currency IDLeave blank for Local

CurrencyLocal / System Default

Apply Period2023-10

Credits Taken0.00

Invoices Paid0.00

Amount to Charge0.00

A/R AgingAllocation

Invoices Allocated0

Credits Allocated0

Discounts Taken0

Write-Offs0

Open CreditsLookup an InvoiceNew Credit/DebitStart OverShow

more invoice IDs in this box separated by commas, spaces or semi-colons to bring them to the top of the list and mark to pay

Entered On	Days	Reference	Billing	Amount	Balance	Available	Paid	Apply	Pay Amount	Discount Taken	Write-Off	Balance A
------------	------	-----------	---------	--------	---------	-----------	------	-------	------------	----------------	-----------	-----------

Scenario #2- No Fees, with ACH

→

Invoice Paylink w/o Fees w/ACH

↺

ManagerHomeLeadsCustomersOpportunitiesRep SummaryAdvertisingExhibitionsSetupLogout

Marketing Analysis

Pipeline

Advertiser Ranking

Budgets / Quotas

255435Inv NoSub

Round Guys Brewing Company

In Good Standing

South Wood Street
Lansdale, PA 19446
Tel: (215) 368-2640

SEND PAYMENT LINK

Select Invoice(s) to Pay

ID	Date	Reference	Amount	Balance	Payment Amount
☒ ABC1521300T	10/24/2023	ABC - Kelly's Co. - Affidavit Testing	375.00	450.00	450.00
☐ ABC1521301T	10/24/2023	ABC - Kelly's Co. - New Long Running Ad for Plan	625.32	750.42	0.00

Send Email Fromkelly.smith@navigaglobal.com

Portal ProfileDefault - this profile has no restricti

Payment Amount450.00

Email ToScott Rudich (navigademotest3+scott@gmail.com)

SubjectYour Quick Pay Link from NAVIGA (DEVDIGITAL)

Email Message

Click here to view your and process your payment.

Debug Token: 1da95872-886d-4652-9b60-9f7f371a0b8e

Open CreditsLookup an InvoiceNew Credit/DebitStart OverShow

more invoice IDs in this box separated by commas, spaces or semi-colons to bring them to the top of the list and mark to pay

Entered On	Days	Reference	Billing	Amount	Balance	Available	Paid	Apply	Pay Amount	Discount Taken	Write-Off	Balance A
10/24/2023	-28	ABC - Kelly's Co. - Affidavit Testin							450.00			0.
10/24/2023	-28	ABC - Kelly's Co. - New Long Run										750.

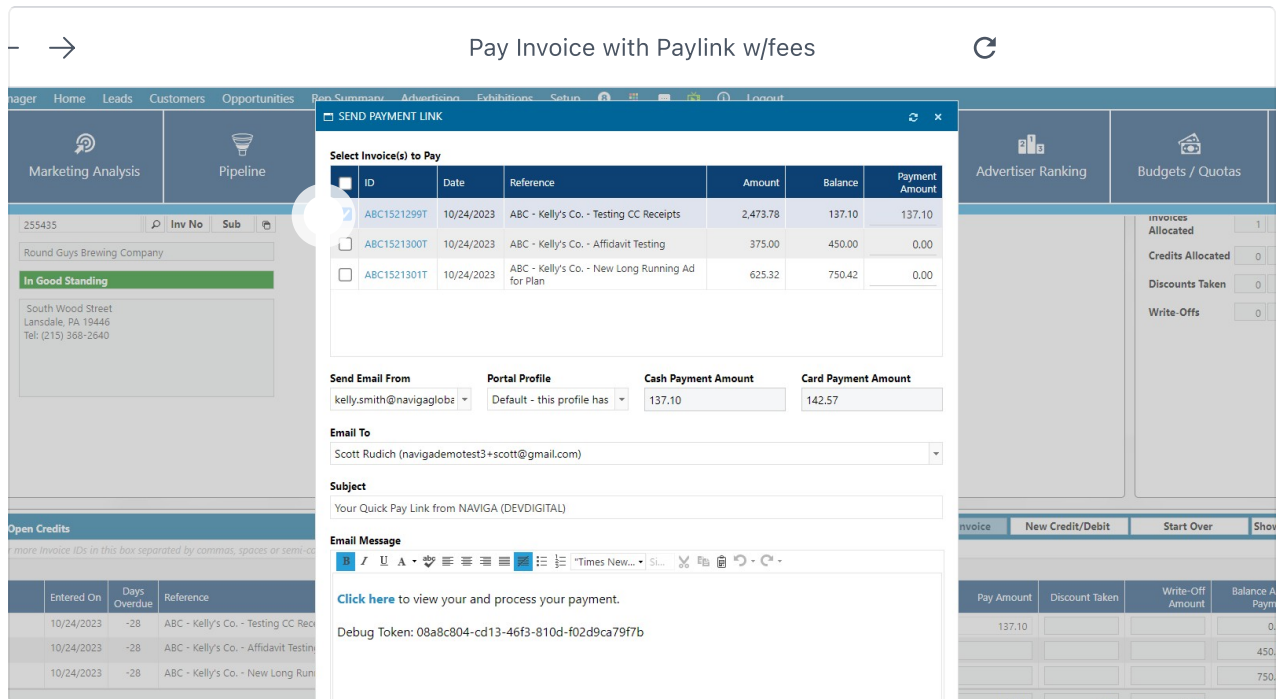
Scenario #3 - With Fees, with ACH

If a customer wishes to pay an invoice without logging in, a system user can send them a pay link from Naviga ad. Demo below walks you through the process for

https://open.gitbook.com/~space/JYtYEVcpsXhw2V5UyPk7/~changes/eqV6Z0dXGUUbyPITtk8/~gitbook/pdf?back=false

12/116

paying invoices with a pay link. For best results view in full screen by clicking the  in the top right corner.



Pay Invoice with Paylink w/fees

SEND PAYMENT LINK

Select Invoice(s) to Pay

ID	Date	Reference	Amount	Balance	Payment Amount
☒ ABC1521299T	10/24/2023	ABC - Kelly's Co. - Testing CC Receipts	2,473.78	137.10	137.10
☐ ABC1521300T	10/24/2023	ABC - Kelly's Co. - Affidavit Testing	375.00	450.00	0.00
☐ ABC1521301T	10/24/2023	ABC - Kelly's Co. - New Long Running Ad for Plan	625.32	750.42	0.00

Send Email From: Portal Profile: Cash Payment Amount: Card Payment Amount:

Email To:

Subject:

Email Message:

Advertiser Ranking

Budgets / Quotas

Advertiser	Invoices Allocated	Credits Allocated	Discounts Taken	Write-Offs
Round Guys Brewing Company	1	0	0	0

Open Credits

Entered On	Days Overdue	Reference
10/24/2023	-28	ABC - Kelly's Co. - Testing CC Receipts
10/24/2023	-28	ABC - Kelly's Co. - Affidavit Testing
10/24/2023	-28	ABC - Kelly's Co. - New Long Running Ad for Plan

Summary Table:

Pay Amount	Discount Taken	Write-Off Amount	Balance A Paym
137.10			0.
			450.
			750.

Prepay Campaign via a pay link from Naviga Ad User

As long as the campaign has not started billing, and is no longer a quote, a pay link can be sent from the payments and invoices node on a campaign. If the campaign is a quote, the user can send the client a proposal with a link to approve the proposal. Once the proposal has been signed, the user will be offered the option to pay, if the Portal settings allow for prepayment. The three demos below walk you through the process in each of our three scenarios. For best results view in full screen by clicking the  in the top right corner.

Scenario #1 - No Fees, No ACH

→

Campaign Pay Link No fees, No ACH

↺

ManagerHomeLeadsCustomersOpportunitiesRep SummaryAdvertisingExhibitionsSetupLogout

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

SUMMARY

ment
t
n Data Forms
alysis

js
ts
in
cts
ts
il / Confirmation

nts

js

iew

Billing Summary

Campaign ID14135Start Date11/1/2023

AdvertiserUnderwater World HorshamEnd Date12/31/2023

BrandUnderwater WorldGross Amount4,000.00

AgencyCommission Amount0.00

StatusConfirmed-Ready to BillNet Amount4,000.00

Est. Tax0.00

CurrencyLocal Currency

Pre-Payments

Enter a New Payment

Payment Type	Bank	Deposit Date	Reference No.	Card Number	Amount	Applied	Status
Cash on Account	BANK AMERICA - NavPay: Payway Edgil	10/26/2023	3555.CC	411111*****1111	1,000.00	0.00	Authorized and Settled, Pending Application
Cash on Account	BANK AMERICA - NavPay: Payway Edgil	10/26/2023	3556.ACH	*****0000	1,000.00	0.00	Authorized and Settled, Pending Application

Scenario #2- No Fees, with ACH

→

Send Campaign Paylink - No Fees w/ACH

↺

ManagerHomeLeadsCustomersOpportunitiesRep SummaryAdvertisingExhibitionsSetupLogout

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

SUMMARY

ment
t
n Data Forms
alysis

js
ts
in
cts
ts
il / Confirmation

nts

js

iew

Billing Summary

Campaign ID14135Start Date11/1/2023

AdvertiserUnderwater World HorshamEnd Date12/31/2023

BrandUnderwater WorldGross Amount4,000.00

AgencyCommission Amount0.00

StatusConfirmed-Ready to BillNet Amount4,000.00

Est. Tax0.00

CurrencyLocal Currency

Pre-Payments

Enter a New Payment

Payment Type	Bank	Deposit Date	Reference No.	Card Number	Amount	Applied	Status
Cash on Account	BANK AMERICA - NavPay: Payway Edgil	10/26/2023	3555.CC	411111*****1111	1,000.00	0.00	Authorized and Settled, Pending Application

Invoices

Scenario #3 - With Fees, with ACH

→

Campaign Paylink w/fees and ACH

↺

Manager

Home

Leads

Customers

Opportunities

Rep Summary

Advertising

Exhibitions

Setup

Logout

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

SUMMARY

ment

t

n Data Forms

alysis

js

ts

in

cts

ts

il / Confirmation

nts

js

Source

Billing Summary

Campaign ID

14135

Advertiser

Underwater World Horsham

Brand

Underwater World

Agency

Status

Confirmed-Ready to Bill

Start Date

11/1/2023

End Date

12/31/2023

Gross Amount

4,000.00

Commission Amount

0.00

Net Amount

4,000.00

Est. Tax

0.00

Currency

Local Currency

Pre-Payments

Enter a New Payment

Payment Type	Bank	Deposit Date	Reference No.	Card Number	Amount	Applied	Status	Generate Receipt
-- No Payments Applied --								

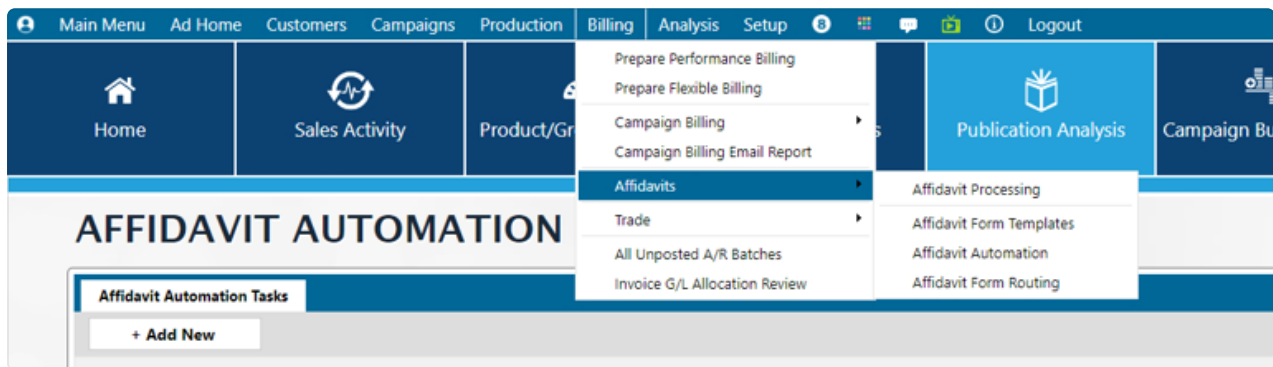
Invoices

Affidavit Processing

Affidavit Processing

Affidavits can now be scheduled and processed automatically in batches. These batches can be printed, emailed or both. Different forms can be called according to setup in Form Routing.

Two new screens are available from the Affidavit menu. Navigate to **Advertising Module → Billing → Affidavits** and find two new menu items: Affidavit Automation and Affidavit Form Routing



Affidavit Form Routing

Manual Entry -

Click the +Add New button at the top of the screen for a new routing rule

1. Select a Product Group
2. Select one or more Products, or leave blank to use rule for all products in this group.
3. Select a Category Tree
4. Select one or more Categories, or leave blank to use rule for all products in this group.
5. Select Delivery type (print, email, or both)
6. Select form to use for this rule

The system will loop through all the rules and will select the rule that has the most exact matches for a given affidavit. This means, if a given order could apply to two rules, but one rule it matches 2 criteria and on another rule it matches on only one, then it will use the form with 2 matches. For example, suppose I have a rule that says for Product ABC, Legal Ads Category Tree, and "All Categories" use template #1. And I have another rule that says for "Product ABC, Legal Category Tree, Bankruptcy Notice Category, use template #2. When I book an order for Bankruptcy notice, both of these templates could technically apply, but the system will select template #2 because it has more exact matches than #1.

Import -

For more complex routing rules, it may be preferable to import rather than manually entering all the rules. To import, click the Import Data button in the top right corner of the screen

The following popup will appear:

IMPORT FROM SPREADSHEET [X]

Select Import File

Clear out and replace current Form Routes on Import

☐ No

1. Click Download Empty Template button to get a copy of a blank template
2. If you already have data in the grid, click Download Template with Current Routes to download a copy of the existing setup to modify.
3. Fill in all fields based on Template information below.
4. Save spreadsheet to your desktop or other preferred location on your computer
5. In the above popup, click select button to select the saved import file
6. If replacing all the current settings, click "yes" to Clear out and replace current form rules on import. If adding to the existing routings, leave that option set to "no"
7. Click Import.

Template Details

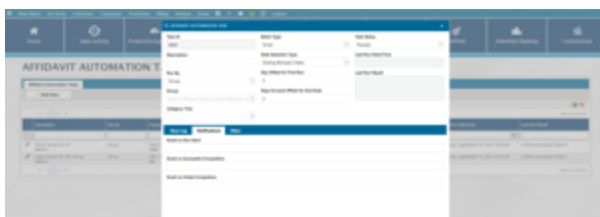
Field	Example	Information	Required?
Group ID	NAVIGA	Alpha-numeric ID from the Product Group Setup	Yes.
Product IDs	DEMO1	Alpha-numeric ID for the Product	No, but if left blank, rule will apply to all Products in the Product Group, which might not be

Field	Example	Information	Required?
			desirable if different forms are using different logos
Category Tree ID	LEGALS	Alpha-numeric ID for the Category Tree	No, but if left blank, rule will apply to all the trees, which might not be desirable.
Category IDs	PUBLICNOTICE	Alpha-numeric ID for the Classified Category / Sub-category. Use comma delimiter for multiples	No, but if left blank, rule will apply to all categories in the tree
Delivery Type	E	Code for Print, Email or Both. P=Print E=Email B=Both	Yes
Form ID	123	Use the Template ID from setup for Affidavit Form Templates	Yes, and must match the ID of an existing Form

Affidavit Automation

Multiple automation batches can be created so that different users are notified upon completion of different runs.

Click the + Add New button



1. Enter description

2. Select to run by product or by product group
3. Select an individual Product or Group or leave blank to use for all.
4. Select Category Tree
5. Select Batch Type (Email, Print, or both)
6. Select Date Selection Type as Running between dates or Running between dates. Generally this will be set based on end dates.
7. Select Day offset for first run and end date - leave as zero for processing orders ending "today"
8. Select task status as active or paused
9. In the notifications section, enter email addresses for whom to notify on Run Start, upon Successful completion, and upon failure
NOTE - this item is still in progress with Dev, so no batch notifications are going out just yet. (AD2-5799)
10. Click save and new to save and create an additional rule, or click Save and Close to save and return to the Automation task list. Click cancel to close without saving.

Once the automation task has begun running, reopen the task with the pencil icon to see the logging information. This will give the time and date it ran, as well as the number of items processed. For detailed logging of the exact affidavits in the batch, see the list of batches in **Billing → Affidavits → Affidavit Processing → Print Batches**

AFFIDAVIT AUTOMATION TASK

Task ID 2	Batch Type Both email and print	Task Status Active
Description Legal Notices	Date Selection Type Ending Between Dates	Last Run Date/Time Tuesday, September 19, 2023 12:03 AM
Run By Product	Day Offset for First Run 1	Last Run Result 2 items processed. Email: Y
Group Select a Product Group or Leave Blank for AL	Days forward Offset for End Date 1	
Category Tree Legal Ads		

Runs Log | Notifications | Other

Date/Time	Result
Tuesday, September 19, 2023 12:03 AM	2 items processed. Email: Y

The Other tab at the bottom will display who created the automation rule, and who last updated it:

Runs Log | **Notifications** | **Other**

Created By Dan Pellegrini	Last Changed By RANDY WESSELS
Created Date/Time Monday, August 14, 2023 1:33 PM	Last Changed Date Time Wednesday, August 16, 2023 1:56 PM

This process will run nightly when the server maintenance is done.

System Parameters Setup

Navigate to **Advertising** → **Setup** → **Admin** → **System Parameters** to configure the email body and subject to be used in sending the emails to the client.

The screenshot shows a web interface for configuring email templates. At the top, there's a blue header with the text "Affidavit Emails". Below this is a grey bar with the text "AFFIDAVIT EMAILS". The main content area is divided into two sections, numbered 1 and 2. Section 1 is titled "EMAIL AFFIDAVIT SUBJECT LINE" and contains a text input field with the placeholder "New Affidavit from #PRODUCT_NAME#". Section 2 is titled "EMAIL AFFIDAVIT BODY" and contains a text area with the placeholder text: "New affidavit from #PRODUCT_NAME# for the notice ending #LAST_ISSUE_DATE#", "Dear #ADVERTISER_NAME#," and "Please find attached your affidavit(s) of publication. Thank you, Legal Notice Team". At the bottom of the form, there are two tabs: "Design" (active) and "HTML".

Use HTML or the design tab to configure desired message to the client. The affidavit itself will be sent as an attachment, similar to invoices and statements.

Use Affidavit Template merge tags to personalize the email to insert data like the Product, Contact Person, etc. These can be found by navigating to **Billing → Affidavits → Affidavit Form Templates**

Artwork Types and Material Deadlines

Artwork Types and Material Deadlines

There is a new concept in Naviga Ad to help manage different deadline times based on the type of material expected. Navigate to **Setup → Advertising Setup - >Artwork Types** and create one or more Artwork Types.

ID	Description
CR	Camera Ready
INH	Inhouse Production Required
PRT	3rd Party Production Required

Reset Save

NAVIGA™ 2023.5 Build 230922.0101 ACCOUNT DEVDIGITAL YOU ARE LOGGED IN AS Kelly Smith (USER KSMITH) (KSMITH) SECURITY GROUP ROOT LANGUAGE English (en-US) (Browser Default) © 2023 NAVIGA All Rights Reserved

These artwork types can now be used in Deadline management on Product Setup - for booking and Material deadlines. Also note that deadline time has also been newly added for the Material Due Date/time; in prior releases there was a date, but no time for the material.

Artwork Type	Ad Type	Section	Category Type	Days of Week	Material Lead Days and Time of Day	Issue Closing Days and Time of Day
Camera Ready (CR)	Cost Per Column-Inch (CPCI) Display Advertising (NR)				1 5:00 PM DAYS TIME OF DAY	3 2:00 PM DAYS TIME OF DAY
Inhouse Production Required (INH) 3rd Party Production Required (PRT)	Cost Per Column-Inch (CPCI) Display Advertising (NR)				2 4:00 PM DAYS TIME OF DAY	3 2:00 PM DAYS TIME OF DAY

Navigate to **Setup → Product Setup** and select a product. In the Material Lead / Closing Settings - Override by Ad Type section, you can now also override by Artwork Type. This can be used to set a different deadline for supplied materials vs

those created internally, or perhaps you need a longer lead time for those that are created by an outsourced designer vs in house artists.

- ❗ For those of you who use the Naviga Ad InDesign Extension, please reach out to support for a new Extension version for 2023.5 release. The old version will still be functional, but you will not see the deadline time in InDesign unless you install the new extension version.

Setting Material Type in Order Entry

When creating a campaign, there is a new field on the campaign header for "Default Artwork Type"

The screenshot shows the 'EDITING CAMPAIGN 13799' interface. The 'Campaign Setup' tab is active, displaying various fields for campaign details. The 'Default Artwork Type' field is highlighted with a purple box and set to 'Camera Ready'.

Campaign Setup		Other Information	
Campaign ID	13799	Start Date	10/1/2023
Campaign Billing Type	Performance Campaign	End Date	10/31/2023
Campaign Description	Placeholder Child #1	Run until cancel	No
Advertiser ID	255218	Gross Amount	270.00
Advertiser Name	Remax - Bob Brown	Commission Amount	0.00
Advertiser Address	200 Senator Way KENTS HILL, ME 04349 Tel: (207) 628-3833	Net Amount	270.00
Client Type	Local (I)	Estimated Tax	0.00
Brand	Remax - Bob Brown	Estimated Total	270.00
Agency / Bill-to	(255218) Remax - Bob Brown	Currency	Use System Default
	View Credit Status	Default Discount %	0.00
Billing Contact		Auto Payment Method	
Billing Address	200 Senator Way KENTS HILL, ME 04349 Tel: (207) 628-3833	Manage Cards on File	
Product Group	ABC - Kelly's Co.	Default Contract	
Order Contact		Payment Terms	Net 30 Days
Production Controller	Kelly Smith (USER KSMITH)	Status	Confirmed-Ready to Bill
Campaign Manager		Marketing Campaign	
		Call List	
		Industry Code	Construction & Remodeling
		Sensitivity Code(s)	
		Default Artwork Type	Camera Ready
		P.O. Number	

Typically, a campaign will not use different types of artwork from line to line, so the user can set it once on the header, and it will be used throughout the campaign. There is an override on the order though, in the event that one or more lines don't follow the rest of a campaign. On the order, the override is on the Other Options tab and is called "Override Artwork Type"

EDITING COST PER COLUMN-INCH LINE: 35098

Line Details Creatives / Materials Production Notes **Other Options** User Defined Fields Category MetaData Rep Assignments Affidavits

Other Settings

Custom Data Form

External Project URL

Marketing Content Template

Line Item P.O. Number

Override Tax

Replace Price on Invoice ☐ No

Split Run ☐ No

Production Link

Space Holder Campaign ID

Number of Tearsheets to Supply

Affiliate Publisher

Affiliate Publisher

Affiliate Commission

Placement Options

Page Priority

Quadrant

Page Position

Requested Page Number

Position is Guaranteed ☐ No

Override Artwork Type

Internal Comment

Along with the above changes to deadlines, there is a new field on some Production Reports. The **Production by Product Group**, **Production by Sales Rep** and **Production by Print Product** now have new search based on Date Type. Options in this field are Line Date or Material Due Date.

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

PRINT PRODUCT PRODUCTION

Product

Date Type Start Date End Date Include Classified Ads ☐ No

Report Template

Filters

Starting on or After Ending on or Before

Filter by Status

Filter by Sections

Filter by Ad Types

Summary by Status

Status No.	Status Description
1	New Material To Come
2	Pickup Material
3	Pickup With Changes
4	Pickup Unknown
5	New On Hand
6	In House Production
7	Proof To Client On Copy Changes
8	Letter To Client

The default will be for Line Dates since that is how the system has always behaved. With line date selected, the Start and End Date search filter on this will be for lines that are running between those dates. Switch the option to "Material Due Date" to search for items where the material is due between the selected Start and End Dates.

Due date/time has also been added to the Artwork Production Management Report:

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

ARTWORK PRODUCTION MANAGEMENT

Report by

Product Group

Artist

Size to Display

Include Completed

Completed From

Completed To

Group

Select a Product Group or Leave Blank for All.

Select an Artist or Leave Blank for All.

Inches

Yes

Refresh

-- No Status Assigned --

Artwork Assigned - Not Started

Artwork in Process

Artwork Awaiting Feedback/Info

Material Needed

Material Rework Requested

Extra

Completed

44

0

0

0

0

0

0

0

Selected Material Projects

Bulk Update Artist Assignment

Bulk Update Artwork Status

Page: 1 of 1

Show size: 44

Change

Item 1 to 44 of 44

Material ID	Advertiser	Brand Name	Description	Size	Ad Headline	Due Date	First Issue Date	Last Issue Date	Issue Count	Assigned Artist	Artwork Status	Artist's Note
13713	Underwater World Hordhaas	Underwater World		4.25 x 5.50 in		Saturday, September 30, 2023 12:00 AM	9/5/2023	10/12/2023	3	Vincent van Gogh		
11013	Mistral - 88 across group	Mistral	Hughes Ad Material Test PHL	12.63 x 16.35 in		Saturday, September 30, 2023 11:30 AM	9/5/2023	12/16/2023	75	Vincent van Gogh		
13524	BMW of North America, LLC	3 Series	Hi Res PDF	12.63 x 8.18 in		Sunday, October 1, 2023 11:30 AM	9/4/2023	11/15/2023	7	Vincent van Gogh		
13829	Casa de Marquez	Casa de Marquez		8.50 x 5.50 in		Monday, October 2, 2023 12:00 AM	9/4/2023	10/4/2023	1			
12939	BLUE TOYS	BLUE TOYS		1.83 x 2.00 in		Tuesday, October 3, 2023 11:30 AM	9/6/2023	10/6/2023	2	Vincent van Gogh		
12166	The Gillette Company	ProGlide Razors		4.13 x 4.00 in		Tuesday, October 3, 2023 11:30 AM	9/6/2023	10/6/2023	1	Vincent van Gogh		
13548	BLUE TOYS	BLUE TOYS		4.25 x 5.50 in		Thursday, October 5, 2023 11:30 AM	9/6/2023	10/26/2023	3	Leonardo da Vinci		

Dynamic Pricing in Classified Portal

Dynamic Pricing in Classified Portal

The classified self-service portal has expanded functionality to be able to price orders dynamically. Previously only flat-fee packages were supported. Now you can offer both flat fee and package pricing based on the template chosen and the content provided.

There are two changes on the Classified Package Setup Screen (**Setup → Classified Order Setup → Classified Package Setup**) to be aware of:

1. The Flag to make the package available online has been moved to the main screen to be more prominent. Previously it was on the Online Options tab at the bottom
2. The "Other Optional Templates" field is also now available on the portal. Previously it was only for internal use. Now you can use this field to upsell customers with different styles/templates and have different pricing depending on the template chosen.

CLASSIFIED PACKAGE SETUP

Category Setup

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

Classified Package Setup

Category Tree Legal Ads

Package ID NEWPKG

Description Legal Ads Package

Order Entry Message

Product Group ABC - Kelly's Co.

Default Template Standard Legal, No Border - pkg rate

Other Optional Templates Standard w/Border - Package Price (STDPKG)

Valid From 4/28/2023

Valid Through 12/31/2025

Available on Classified Self-Service Portal ☒ Yes

Flat Fee Package ☐ No

Flat Fee Amount

Prompt for Product Selection ☐ No

Minimum Product Selection Allowed

Prompt for Package Multiplier ☐ No

Products	Online Options		
Product	No. of Issues/Days	Issue Day Restrictions	Delete
QA Daily Classified QA6	3		
The Star QA Daily Newspaper QA1	3		
Pub 1 - ABC Newspaper ABC1	3		

The online options tab remains the same as in previous releases, except for the removal of the "Available on Classified Self-service Portal" flag.

Products	Online Options
Web-Only Preview Width	
Columns	1
Offer Sort Code	4
Offer Title	Dynamic Online Package
Offer Sub Title	3 Products, 3 Days - All Print
Offer Image	 ~/localstorage/classified/online/packages/NEWPKG/offer-1 Select Download File Delete File
Offer Pricing Display	Starting at \$100
Offer Pricing Sub Text	Rate variable based on size
Offer Fine Print	NEWPKG - Legal Ads Package
Show Banner	☐ No
Banner Text	
Banner Color	Green

On the Classified Template Setup (**Setup → Classified Order Setup → Classified Category Template Setup**), there is a new field called Classified Self-Service Portal Description to be used as a customer-friendly description. If nothing is filled in here, then the Template Description will be used. This will allow you to better describe to the client what to expect from the template selected.

During order entry in the Portal, the steps that the client sees will be largely the same as it has always been. The only visible difference to the client will be the option to change the template on the Ad Information step.

Step 1
Step 2
Step 3
Step 4
Step 5

Ad Category
Booking Selection
Ad Information
Order Summary
Confirmation

3

TELL US ABOUT YOUR AD
This is where you enter the information about your ad. We will use this information to compose your ad to fit our print and digital formats. This information can also be helpful in making sure your ad is seen online!

This is also where you select the specific run date(s) for the package you have selected. Once we have all of that, we will show you a rendering of your ad, using your data.

Layout
Standard Legal, No Border - pkg rate

Ad Data
Headline
Headline

Body Text
Now eldest new tastes plenty mother called misery get. Longer excuse for county nor except met its things. Narrow enough sex moment desire are. Hold who what come that seen read age its. Contained or estimable earnestly so perceived. Imprudence he in sufficient cultivated. Delighted promotion improving acuteness an newspaper offending he. Misery in am secure theirs giving an. Design on longer thrown oppose am.

Affidavit

County Details

Ad Preview
HEADLINE
Now eldest new tastes plenty mother called misery get. Longer excuse for county nor except met its things. Narrow enough sex moment desire are. Hold who what come that seen read age its. Contained or estimable earnestly so perceived. Imprudence he in sufficient cultivated. Delighted promotion improving acuteness an newspaper offending he. Misery in am secure theirs giving an. Design on longer thrown oppose am.

If there is only one layout offered in setup, they will simply see the layout displayed. If there are Other Optional Templates assigned to the package, then this will be a dropdown and the customer can select which template they would like to use. The rate is set on the template, so when they get to the Summary step, the price will reflect the selected template.

Email Integration Monitor

Email Integration Monitor

Nylas Integration

For those who are using the Nylas Email Integration, there is new visibility into the emails that are / are not matching to accounts within Naviga Ad.

Navigate to **System Settings Module → Integration → Email Integration Monitor**

Main Menu

Security

Activity

Client Portal Access

Integration

Setup

Logout

EMAIL INTEGRATION MONITOR

Nylas

Status: Active

Linked Accounts: 8

Bcc

Status: Active

Monitored Account: [navigasync@gmail.com](#)

Forward

Status: Active

Monitored Account: [navigasync@gmail.com](#)

Nylas Linked User Accounts

Nylas Events

Bcc/Forward Events

User Name	Enable Sync Email	Email to Sync	Foldert(s)	Enable Sync Calendar	Sync Days Before Today	Sync Days After Today	Calendar Name	Nylas Sync State	Is Nylas Authorized	Authorization Date	Authorization Removal Date	Time Zone	Delete Account
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sally Sales Manager SALESMGR	☒	salesmgr@Dtint.onmicrosoft.com View Sync History		☒	0	0		running	☒	10/17/2023			Delete
Donna Beasley DBEASLEY	☒			☐	0	0		unknown	☐				Delete
Bob Haggie SALESUSER1	☒	Sales1@Dtint.onmicrosoft.com View Sync History		☒	0	0		running	☒	10/16/2023			Delete
John Pitchman SALESUSER2	☒	sales2@Dtint.onmicrosoft.com View Sync History	NavigaAd5ync	☒	0	0		running	☒	10/16/2023			Delete
Wayne Burrows WBURROWS	☒			☐	0	0		unknown	☐				Delete
Randy Wessels RANDYWESSELS	☒			☐	0	0		unknown	☐				Delete
Hugh Grantley HGRANTLEY	☒			☐	0	0		unknown	☐				Delete
Kelly Smith KSMITH	☒	ncsdemo@Dtint.onmicrosoft.com View Sync History		☒	30	60		running	☒	8/24/2023	9/19/2023		Delete

NAVIGA™ 2023.4

Build 231023.0134

ACCOUNT

DEM

YOU ARE LOGGED IN AS

Kelly Smith (KSMITH)

SECURITY GROUP

CLIENTS

LANGUAGE

English (en-US) (Browser Default)

© 2023 NAVIGA

All Rights Reserved

A user will be displayed in this list if one or both of these settings is selected on their profile:

MY PROFILE

User ID

HGRANTLEY

User Name

Hugh Grantley

User E-Mail Address

navigademotest3@gmail.com

User Security Group

CLIENTS

Profile Picture

Select New

Remove Profile Picture

Recommended square

200 x 200 headshot

Basic Settings

Production

CRM

Email Integration

Rep Security

User Name / Email Address

Connection Authorized

No

Authorize Connection

Enable Email Sync

☐

Yes

Enable Calendar Sync

☐

Yes

Email Folder(s)

Leave this field blank to Sync the default Inbox and Sent Items

Account Link Status

unknown

Calendar Name

The Calendar Name is only used for Outlook

Sync Days Before Today

0

Sync Days After Today

0

Close

Save

If the user enters an email address in the profile email integration tab (above screenshot) and authorizes connection to that email, then the other columns from the first screenshot will be populated as well.

The Nylas Sync State lets an admin know the status of the sync.

Possible options here are: valid | invalid | downloading | running | partial | invalid-credentials | exception | sync-error | stopped | initializing

The meanings of each status is described below (taken from the [Nylas website](#))

Sync state	Simplified	Detailed	Description
valid	x		All emails for folders, contacts, and calendars are syncing reliably.
invalid	x		The account has an authorization issue and needs to be re-authenticated.

Sync state	Simplified	Detailed	Description
downloading	x		All folders are connected and the account is in the process of syncing all historical messages on the account. Depending on the size of the account and the speed of the connection between Nylas and the email server, this can take up to 24 hours or more to complete. During this time, the account is usable for sending messages and receiving new email messages.
running		x	All emails for folders, contacts, and calendars are syncing reliably.
partial		x	Partial states are typically temporary and may indicate issues with the mail server. Accounts in this state, however, are still running. One or more folders in the account may not fully sync currently or not sync mail at all. Typically, accounts recover and return to a full-running state. Some reasons an account may be in a partial state: • It's a new account and hasn't finished its initial sync. • The account was recently reauthenticated. • The user deletes, changes, adds, or restricts folders. • Slow network connections. • Low bandwidth on the email server. •

Sync state	Simplified	Detailed	Description
			A backlog within the Nylas platform. • A large number of folders in the user's mailbox. • Syncing historical data • The user has external integrations that may be slowing down their email server. • The user's email server has connection or network issues. • Microsoft accounts with numerous folders.
invalid-credentials		x	You can only continue to use an account with the Nylas API as long as the <ACCESS_TOKEN> is valid. Sometimes, this token is invalidated by the provider when connection settings are changed or by the end-user when their password is changed. When this happens, reauthenticate the account and generate a new <ACCESS_TOKEN> for the account.
exception		x	This can occur if an upstream provider returns an error that Nylas's sync engine doesn't yet understand. Please contact Naviga Support for accounts in this state.
sync-error		x	An unexpected error was raised while syncing an account. Please contact Naviga Support for accounts in this state.

Sync state	Simplified	Detailed	Description
stopped		x	An account stops syncing if it repeatedly encounters the same error or is unable to access the email server. In cases where an account has stopped, you can try to restart it using the downgrade and upgrade endpoints. If the account continues to fall into a stopped sync state, please contact Naviga Support.
initializing		x	The account has been authenticated on the Nylas platform and is in the process of connecting to all the account's folders. Accounts that use email.send as the only scope will always be in an initializing state. Nylas uses folders to determine sync status.

Under the email to sync column is a link to View Sync History for each user. Click on that link for a popup of all the matched and unmatched emails that have been processed. During testing and initial implementation of the Nylas email sync feature, users will often be looking for specific emails and asking questions about why something may or may not have shown up as linked to a customer account. This gives admins of the system additional visibility into the processed emails.

EMAIL HISTORY

Start Date

End Date

Refresh

Matched Emails

Unmatched Emails

Page: 1 of 1 Go

Page size: 4 Change

Item 1 to 4 of 4

Source	Added Date Time	Subject Line	From Address(es)	To Address(es)	CC Address(es)
Nylas	Tuesday, October 17, 2023 2:30:16 PM	Proposal	sales1@dtint.onmicrosoft.com	aenderle@msgl.com Matched Contact: Amanda Smith (100294) Matched Account: Bethesda North Hospital (100293)	
Nylas	Monday, October 16, 2023 2:45:10 PM	RE: Hello from Bob Haggles	aenderle@msgl.com Matched Contact: Amanda Smith (100294) Matched Account: Bethesda North Hospital (100293)	Sales1@Dtint.onmicrosoft.com Matched Account: Bethesda North Hospital (100293)	
Nylas	Monday, October 16, 2023 1:41:12 PM	Hello from Bob Haggles	sales1@dtint.onmicrosoft.com	aenderle@msgl.com Matched Contact: Amanda Smith (100294) Matched Account: Bethesda North Hospital (100293)	
Nylas	Monday, October 16, 2023 1:29:37 PM	Hello from your Naviga Sales Repl	sales1@dtint.onmicrosoft.com	Scott.Kersey@navigaglobal.com Matched Contact: Scott Kersey (100224) Matched Account: Scott's Tree Service Inc (100223)	

Page: 1 of 1 Go

Page size: 4 Change

Item 1 to 4 of 4

EMAIL HISTORY

Start Date

End Date

Refresh

Matched Emails

Unmatched Emails

Page: 1 of 1 Go

Page size: 2 Change

Item 1 to 2 of 2

Source	Added Date Time	Subject Line	From Address(es)	To Address(es)	CC Address(es)
Nylas	Wednesday, October 18, 2023 8:51:15 AM	Proposal for December Ads	kelly.smith@newscycle.com	navigademotest3+scott@gmail.com	
Nylas	Wednesday, October 18, 2023 8:51:15 AM	Proposal for December Ads	kelly.smith@newscycle.com	navigademotest3+scott@gmail.com	

Page: 1 of 1 Go

Page size: 2 Change

Item 1 to 2 of 2

On the matched emails tab, the subject is displayed as a link and the admin user can click on it to view the text of the email, the same as they would see should they see that email on the customer/contact account record or the managers rep activity

screen. Unmatched emails will not have a link to read the text of the email for individual privacy reasons.

Email BCC / FWD Sync

In some cases, a media company may prefer to allow users to pick and choose which emails to sync by forwarding or bcc-ing emails to a monitored email address rather than using the Nylas integration, which will automatically scan the users inbox and sent mail (or other designated folder).

The plus side of using email BCC/FWD instead of Nylas is that there is more control for the users to pick and choose which emails to send into the system. The downside of using email BCC/FWD is that there is more control for the users to pick and choose which emails to send into the system. With the control being on the user, they can cherry-pick the positive emails and not sync if the client is unhappy with them. Allowing the user to pick the emails does allow them to keep the system more tidy though and eliminate syncing the clutter that might not be relevant to keep.

Navigate to **System Settings Module → Integration → Email Forward and/or BCC Configuration**

 **Note** - the BCC integration is ready to go. We are still fixing some remaining issues with the FWD, so don't enable that one in your PROD system just yet.

Select Yes to enable the bcc and/or forward integration. Once the gmail account is configured, it will be selected from the dropdown in step 3, below:

EMAIL FORWARD AND/OR BCC CONFIGURATION

Integration Settings

INTEGRATION SETTINGS

This integration uses a Gmail oAuth Connection to monitor and process emails.

- ENABLE BCC INTEGRATION**
☒ Yes
- ENABLE FORWARD INTEGRATION**
☒ Yes
- GMAIL ACCOUNT TO MONITOR**
DEMO
These connections are setup here: [Connection Setup](#)

Click on the Connection Setup link from screenshot above.

CONNECTION SETUP

Connection Setup
Connection Setup
Connection Setup

Connection

Connection ID

Description

Connection Type

Connection Settings

User Name / Email

Client ID

Client Secret

Refresh Token

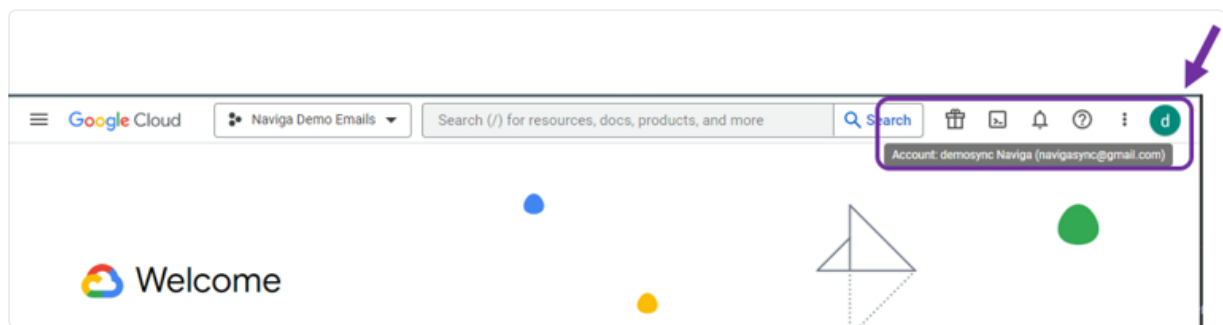
Authorization Status Connection Not Authorized :(

Click New and give the connection an ID and a Description. The Connection Settings section will be filled in after following the steps below to create a gmail account and to get the Client ID and Client Secret from the Google Development Console.

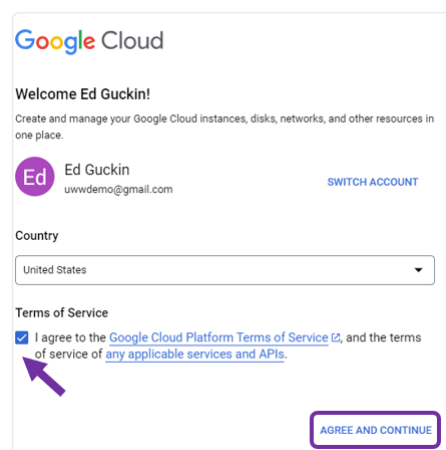
To set up the email BCC/FWD integration, an admin must first setup the account which will be used for forwarding. We have standardized this using a google email address. If you are using G-Suite as your email system, you can use something like `navigasync@yourdomain.com`, or you can just create a free gmail account and use that. The important part is that you are able to get to the Google Developer Console to give your naviga ad instance oauth access to the mailbox to be able to actually sync the emails.

Follow these steps to enable the sync:

1. Create Gmail Account (If needed)
2. Navigate to Google Cloud: <https://console.cloud.google.com/>
3. Make sure upper right hand corner of webpage has email account selected – if not select and log into that email account:



4. If this is the first time using Google Cloud, you may have to agree to terms of service:



5. Select a project and choose New Project:



6. Give it any name and choose Create:

New Project

 You have 12 projects remaining in your quota. Request an increase or delete projects. [Learn more](#)

[MANAGE QUOTAS](#)

Project name *
Naviga Email 

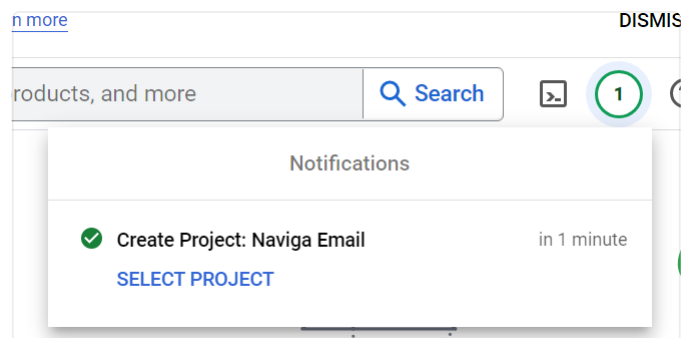
Project ID: naviga-email. It cannot be changed later. [EDIT](#)

Location *
 No organization [BROWSE](#)

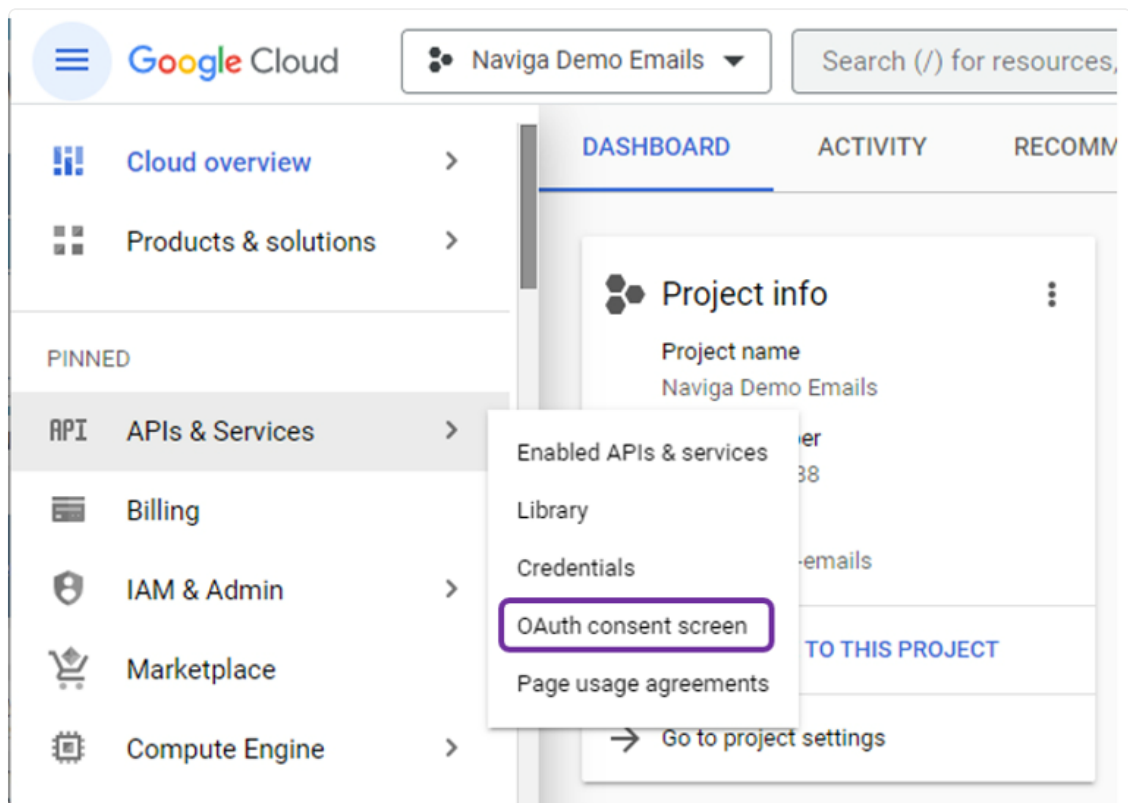
Parent organization or folder

[CREATE](#) [CANCEL](#)

7. Once the creation is done, choose Select Project:



8. Under APIs and Services, choose OAuth consent screen:



9. Choose External and then Create:

OAuth consent screen

Choose how you want to configure and register your app, including your target users. You can only associate one app with your project.

User Type

☐ Internal ?

Only available to users within your organization. You will not need to submit your app for verification. [Learn more about user type](#)

☒ External ?

Available to any test user with a Google Account. Your app will start in testing mode and will only be available to users you add to the list of test users. Once your app is ready to push to production, you may need to verify your app. [Learn more about user type](#)

[CREATE](#)

10. Give the application a name (any name) and select your email address from the list:

11. Skip the app logo and App domain sections and then use any email address for Developer Contact and click Save and Continue:

12. Click Add or Remove Scopes:

13. Under the manually add scopes add these and click Add to Table:

<https://www.googleapis.com/auth/gmail.readonly>
<https://www.googleapis.com/auth/gmail.modify>

14. Select `../auth/userinfo.email` and `openid` from the top section (in addition to the two you added):

✕ Update selected scopes

Only scopes for enabled APIs are listed below. To add a missing scope to this screen, find and enable the API in the [Google API Library](#) or use the Pasted Scopes text box below. Refresh the page to see any new APIs you enable from the Library.

Filter
 Enter property name or value
 ?

☐	API ↑	Scope	User-facing description
☒		<code>../auth/userinfo.email</code>	See your primary Google Account email address
☐		<code>../auth/userinfo.profile</code>	See your personal info, including any personal info you've made publicly available
☒		<code>openid</code>	Associate you with your personal info on Google
☒		<code>../auth/gmail.readonly</code>	View your email messages and settings
☒		<code>../auth/gmail.modify</code>	Read, compose, and send emails from your Gmail account

15. Click update at the bottom of the window and then Save and Continue. On the Test users screen you can leave it empty and choose Save and Continue:

☒ OAuth consent screen
 —
 ☒ Scopes
 —
 ☒ **Test users**
 —
 ☐ Summary

Test users

While publishing status is set to "Testing", only test users are able to access the app. Allowed user cap prior to app verification is 100, and is counted over the entire lifetime of the app. [Learn more](#)

[+ ADD USERS](#)

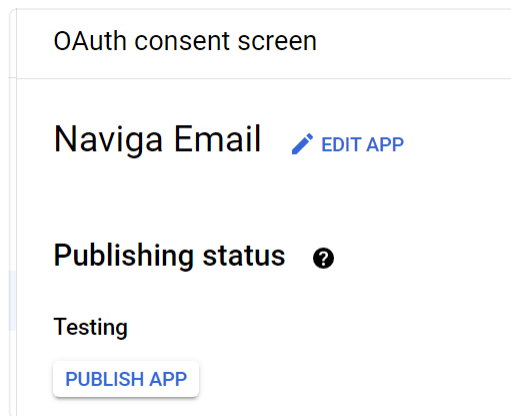
Filter
 Enter property name or value
 ?

User information

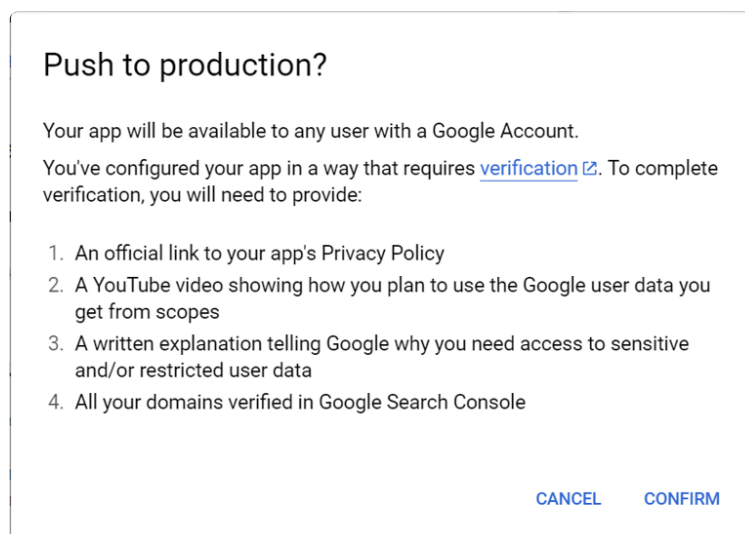
No rows to display

[SAVE AND CONTINUE](#)
[CANCEL](#)

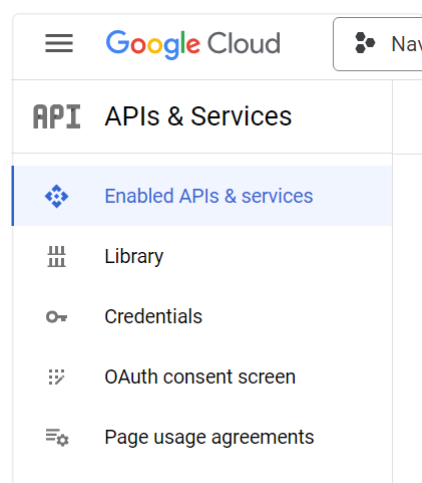
16. Choose Back to Dashboard and then Publish App:



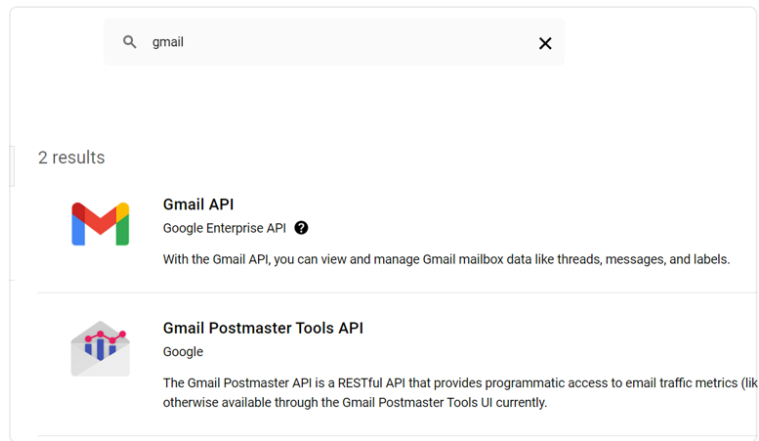
17. Once the pop-up is displayed to push to production, click Confirm:



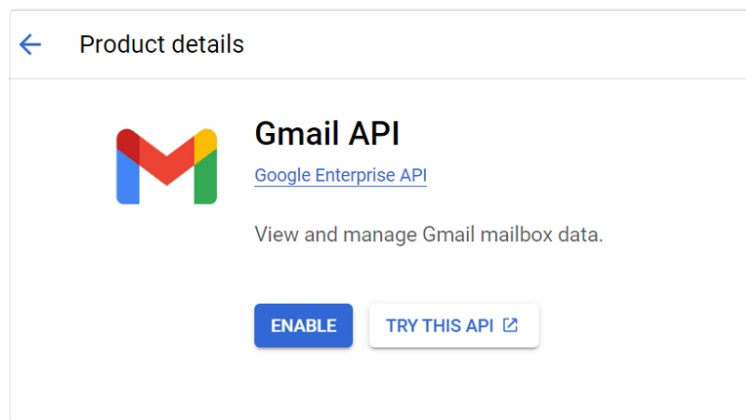
18. Next click Library to go to the list of available APIs:



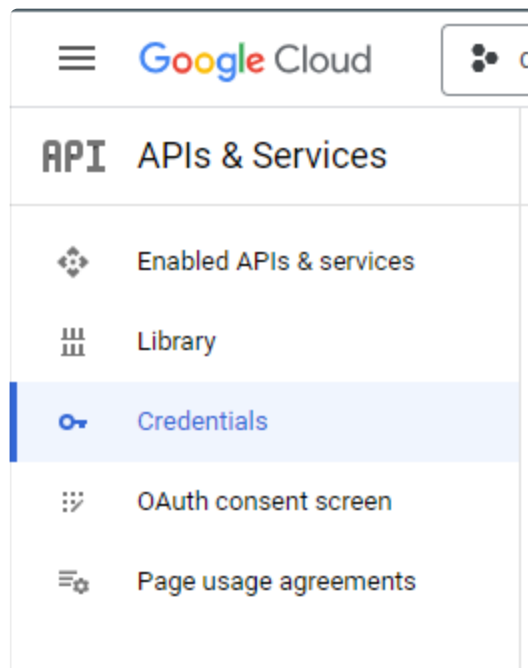
19. Type in gmail and hit enter to search for the gmail api:

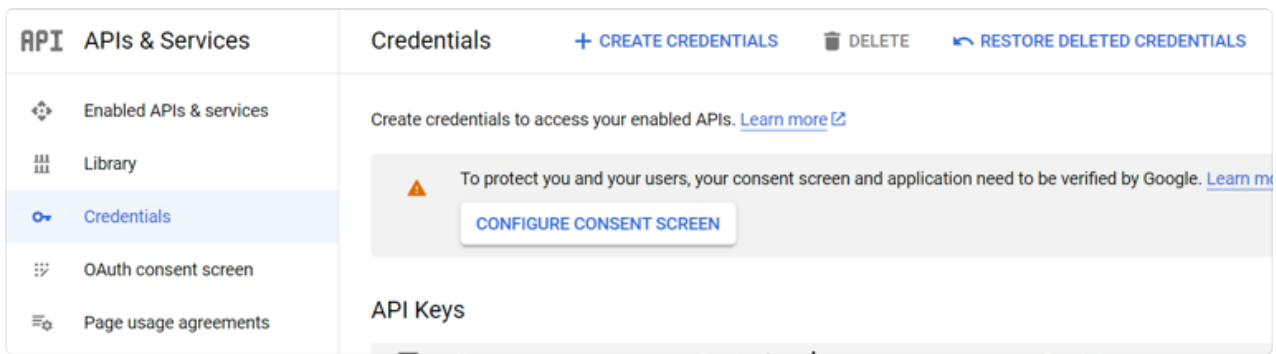


20. Choose Gmail API and then click enable:

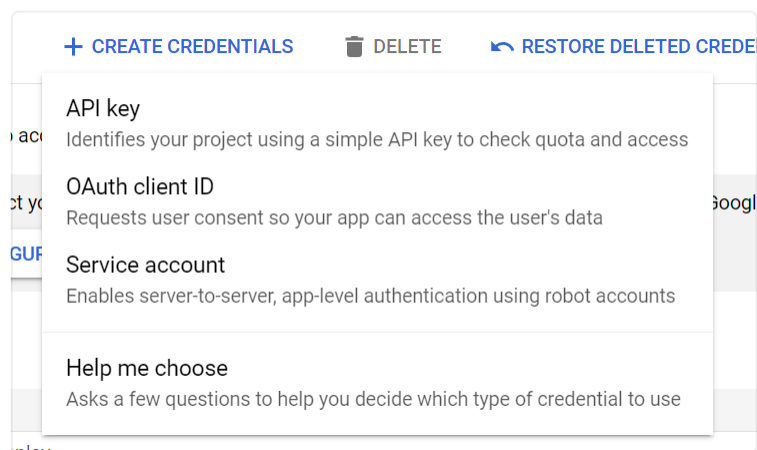


21. Next choose Credentials from the left menu and then Create Credentials at the top:

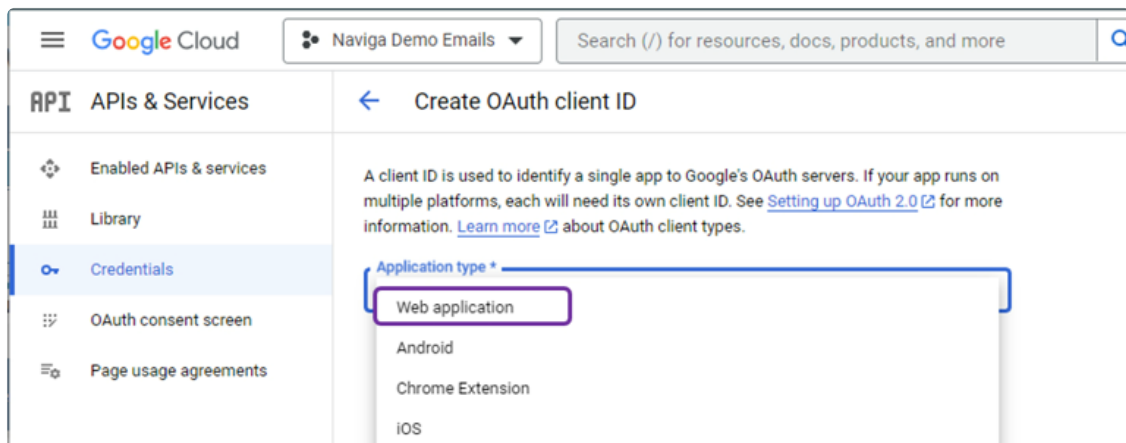




22. Choose OAuth client ID:



23. Chose Web application for the Application type.



24. Chose any name for the Name field.

For Authorized JavaScript origins use the first part of the url of the Naviga System. If there are test or dev systems with a different prefix, include them here as well. For example, our dev system the base url is this:
<https://dev.navigahub.com> yours will be your 3-digit site code where we have "dev"

For the Authorized redirect URIs, you need to use the full URL or the screen you will be authorizing your connection on. For example, our dev system the full url is this:

https://dev.navigahub.com/ew/devdigital/general/setup/oauth_connections

NOTE – the url above is case sensitive so be sure it matches what you have in your browser URL. If EW or your 3-digit site code are capitalized, be sure to capitalize in the Authorized redirect URIs

25. Once you click Create you will get a pop-up with some important information:

26. In the Naviga Ad system you will need to go to the URL that you specified in the prior step and create a new connection:

27. Click save so the connection is saved just in case there is a problem with the authorization. When you are doing the authorize it needs to redirect to Google and then comes back to the Naviga Ad system.

Click Authorize and then choose the email address (you may have multiple displayed if you have multiple gmail accounts):

28. You may recall when setting up the OAuth Consent screen Google gave you a message about the App needing to be verified. Because the application has not been verified you will get a screen that looks like this:



Google hasn't verified this app

The app is requesting access to sensitive info in your Google Account. Until the developer (navigarandy@gmail.com) verifies this app with Google, you shouldn't use it.

If you're the developer, submit a verification request to remove this screen. [Learn more](#)

Advanced

BACK TO SAFETY

Choose Advanced and then Go to navigahub.com (unsafe). This doesn't make you any less safe, it is just google trying to protect your account. In this case you were the one that created the Google Cloud Account.

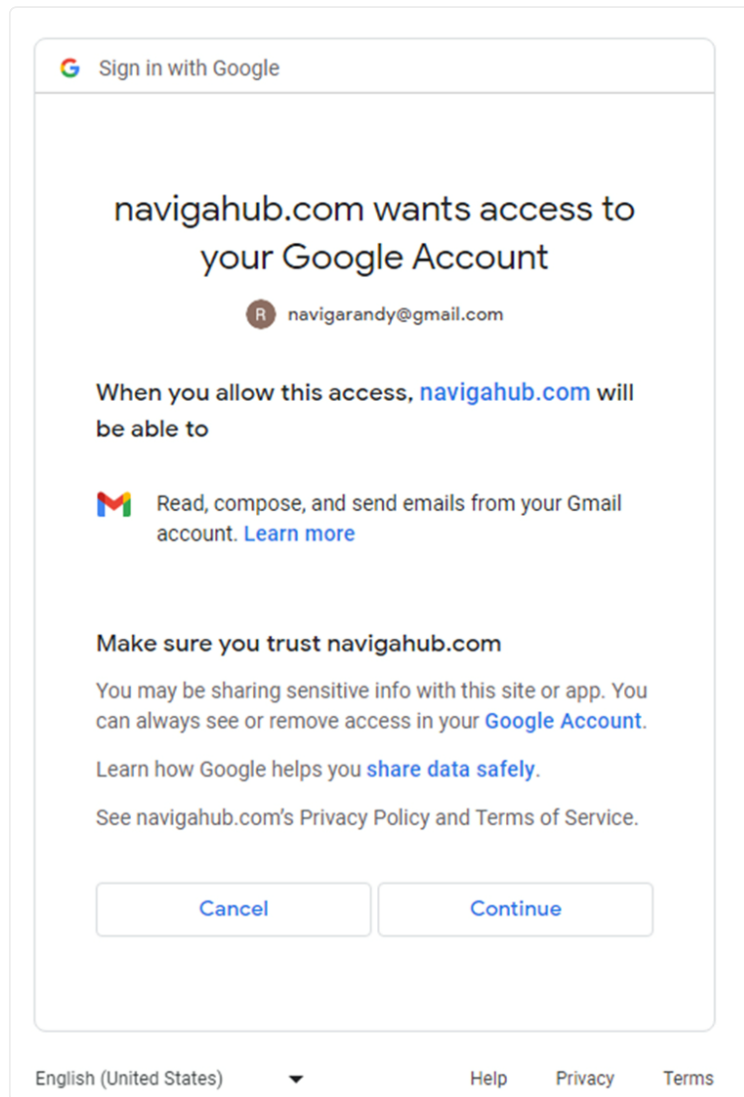
[Hide Advanced](#)

BACK TO SAFETY

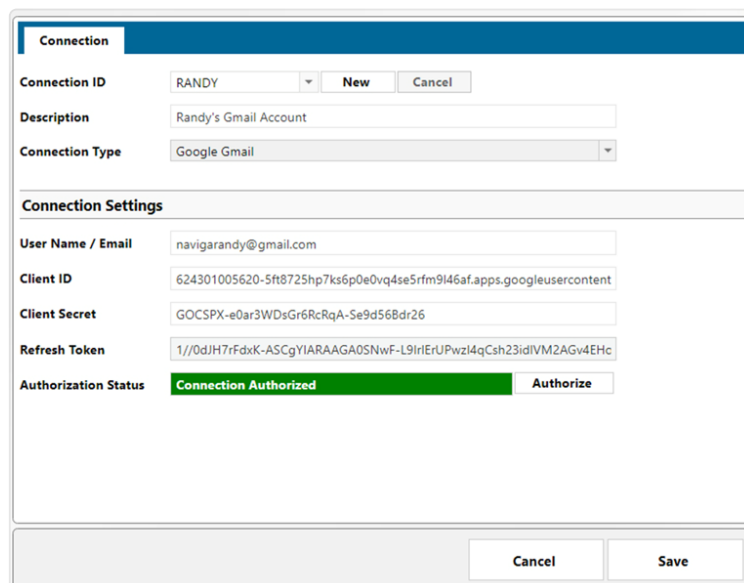
Continue only if you understand the risks and trust the developer (navigarandy@gmail.com).

[Go to navigahub.com \(unsafe\)](https://navigahub.com)

29. Next you will get the Google screen asking you for access to read and compose messages in this gmail account. You need to select continue to proceed:



30. Assuming everything went ok, you should be back on the Naviga Ad screen with a green banner saying the connection was authorized. Just click save to make sure that everything was saved:



Once this has been enabled, users can start to BCC the created Gmail sync email account on emails sent to their clients. They can also forward emails received from their clients to that same email address and, if matched with an email in the system, the email will sync to the customer's account in the same way that the Nylas emails sync.

Back in the Email Integration Monitor, these BCC and FWD events will be displayed in the matched/unmatched tabs in the users sync history. Admins can tell how the email came into the system by looking at the source:

EMAIL HISTORY

Start Date

End Date

Saturday, September 23, 2023

Monday, October 23, 2023

Refresh

Matched Emails

Unmatched Emails

Page: 1 of 1 Go

Page size: 2 Change

Item 1 to 2 of 2

Source	Added Date Time	Subject Line	From Address(es)	To Address(es)	CC Address(es)
Bcc	Monday, October 16, 2023 5:24:54 PM	Sample ads	sales2@dtint.onmicrosoft.com	c21account@gmail.com Matched Contact: Keith Flemming (100348) Matched Account: Century 21 (100347)	
Nylas	Monday, October 16, 2023 1:26:25 PM	Re: Sample ads	c21account@gmail.com Matched Contact: Keith Flemming (100348) Matched Account: Century 21 (100347)	sales2@dtint.onmicrosoft.com Matched Account: Century 21 (100347)	

GAM Ratecard Import / Export

So many new fields were added to the Ratecard Import/Export to accommodate GAM targeting!!

It will be much easier on first creation to use the GUI to make these selections. Several of these items are quite detailed multi-valued and sub-valued fields and just are not that easy to display in an excel spreadsheet format. The use case on these is really to update existing rate cards rather than doing the initial creation.

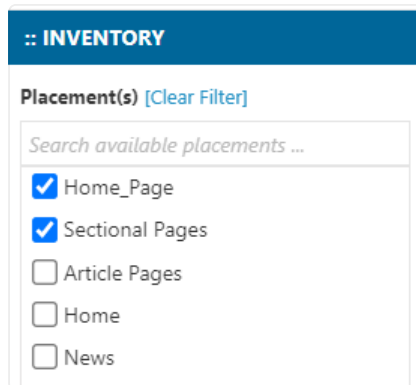
Multi-valued fields are simply separated with a comma

If a value within a field, has multiple parts to it, those pipe | delimited.

If anything within a pipe has multi-values, those are semi-colon delimited.

Here are some examples:

Multiple placements are selected on a rate:



:: INVENTORY

Placement(s) [\[Clear Filter\]](#)

Search available placements ...

- ☒ Home_Page
- ☒ Sectional Pages
- ☐ Article Pages
- ☐ Home
- ☐ News

The above in excel would be represented as follows - these are the ID's of these placements as found in Ad Server Integration Setup

CB
Placements
79362,1301472

Slightly more complex, these creative sizes have multiple parts to it. The master size, the companion size and the count. (Please note that Targeting Rules on creatives, AMP Flag, Frequency Caps, and Native Media Orientation on expected creative sizes are not supported in the Import/Export.)

Items with multiple parts are pipe separated:

:: EXPECTED CREATIVE SIZES						
Master: 336x280 (Large Rectangle) + Companion(s): 250x250 (Square Pop up)						
Size(s)	Targeting Rules	Count	AMP Only	Ad Unit Frequency Cap	Native Media Orientation	
Master Size 336x280 (L)	Companion Sizes 250x250 (Square Pop up)	3	☐ No			✖

ID's are also used here, so this is what the above would look like in excel:

CC
Expected Sizes
4 2 3

Now if the above had multiple rows or multiple companion sizes on any one row, then this gets even more complex:

:: EXPECTED CREATIVE SIZES						
336x280 (Large Rectangle), 250x250 (Square Pop up), 336x280 (Large Rectangle), 180x150 (Rectangle), 720x300 (Full Banner), 468x60 (Half Banner), 234x60 (Micro Bar), 120x90 (Button 1)						
Size(s)	Targeting Rules	Count	AMP Only	Ad Unit Frequency Cap	Native Media Orientation	
Master Size 336x280 (L)	Companion Sizes 250x250 (Square Pop up), 336x280 (Large Re	3	☐ No			✖
Master Size 720x300 (F)	Companion Sizes 468x60 (Half Banner), 234x60 (Micro Bar), 12	1	☐ No			✖

The above would be represented by the below in Excel:

CC
Expected Sizes
2
4 2;4;5 3,7 8;9;10 1

The first 4 is the Master, between the pipes is the list of companions separated by semi-colons, and the 3 is the count. Then after the comma is the second row with 7

being the master, 8, 9, and 10 between the pipes being the companions, and then the creative count is 1.

If it was a creative type without a master, then the first character will be the pipe. Google puts the standard creatives as companions and has no master on those.

Now that you understand the formatting rules, below are the new fields in the ratecard export/import. All fields are optional, but if used, anything that is an ID must represent a value already in the database. The ID's can be looked up most easily from the Ad Server Integration setup.

Additional Template Fields:

Additional columns added	Example	Data Source	Mandatory/ Optional
Grace Days	3	numeric field from 0-7; See field 1 in below diagram	Optional
Max Impressions	20,000	numeric field (no decimal); see field 2 in below diagram	Optional
Ad Server Override Qty	20,000	numeric field (no decimal); see field 3 in below diagram	Optional
Ad Server Description	Test123	This alpha-numeric field overrides the description for the line item in the Ad Server. See field 4 in below diagram	Optional
Target Platform	BROWSER	See field 5 in below diagram. Valid entries are: BROWSER MOBILE_APP VIDEO_PLAYER	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
Default Goal Percent	50	Numeric field (no decimal) between 0 and 100 representing the goal % on a sponsorship type campaign. See field 6 in below diagram. This field will be hidden if the Google line type (related to the ad type) is "standard"	Optional
Goal Type Limit	NONE	Not in diagram below, but will appear where Field 6 is only if ad type has GAM Line Type of Click Tracking or Price Priority. Valid options here are: NONE LIFETIME DAILY	Optional
Delivery Priority	4	Numeric field. Number ranges from 2 - 16, and valid numbers will depend upon the Google Line Type. See field 8 in below diagram and additional details below the diagrams	Optional
Delivery Method	E	Alpha code field. Options as follows: E = Deliver Evenly F=Frontloaded Delivery A=As Fast As Possible	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
		See field 9 in Diagrams below	
Max Duration	30	Numeric field. This will only display when the Creative Type is Video. See field 10 in Diagrams below.	Optional
Allow Same Advertiser	TRUE	Valid options are TRUE or FALSE or Y/N. See field 11 in Diagrams below	Optional
Display Creatives	ONLY_ONE	Valid Options are: ONLY_ONE, ONE_OR_MORE, ALL_ROADBLOCK, AS_MANY_AS_POSS IBLE, CREATIVE_SET See field 12 in diagrams below. Only relevant to Standard and Video Creative types	Optional
Rotate Creatives	EVEN	Valid Options are: EVEN, OPTIMIZED, MANUAL, or SEQUENTIAL See field 13 in diagrams below	Optional
Creative Type	S	Valid Options are: S=Standard V=Video M=Master/Companio n See field 14 in Diagrams below	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
Display Companions	OPTIONAL	Valid Options are: OPTIONAL AT_LEAST_ONE ALL UNKNOWN See field 15 in Diagrams below	Optional
Included Ad Units	87642399, 87642519*217 32251258, 21698962035	Numeric field representing the ad unit ID from GAM. This can be found in Naviga Ad in the ID column in Ad Units node of Ad Server Integration setup. Multiple ad units are separated by commas. A Child AdUnit will be represented with an asterisk between the parent and child. See field 16 in Diagrams below	Optional
Excluded Ad Units	21740211698,2 33044272,217 40211440	Numeric field representing the ad unit ID from GAM. This can be found in Naviga Ad in the ID column in Ad Units node of Ad Server Integration setup. See field 17 in Diagrams below	Optional
Placements	79362,1301472	Numeric field representing the placement ID from GAM. Multiples are separated by commas.	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
		See field 18 in Diagrams below	
Expected Sizes	With master: 4 2 3 or without master: 2 3	Alpha-numeric field representing the ID's of sizes. Multiple rows of data are separated by commas, multiple items within a row are separate by a pipe character. Only fields supported here are the Master, the Companion and the Count. If there is no master the first field is blank and the companion and the count will be displayed See field 19 in Diagrams below	Optional
Labels	380075467	Numeric field representing the labels selected. These are the ID's of the label, which can be seen in Ad Server Integration setup See field 20 in Diagrams below	Optional
Geographies	21171 I,21164 I, 21167 I,102519 7 E,200698 E	Each Geo location in GAM is represented by a numeric ID. That is used in the first position, then a pipe, followed by an I for Include, or an E for Exclude.	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
		Multiples are separated by commas. See field 21 in Diagrams below	
Custom Targeting	292392 IS 447 697811592;44 7697811832;4 47697812072; 447697812312	Numeric field representing ID's of the Custom Key-value pairs. The Key is in the first position, followed by pipe, followed by IS or IS_NOT, followed by another pipe and then the value(s). Values are semi-colon separated. Multiple key-value pairs would be comma separated. See field 22 in Diagrams below	Optional
Day Parts	Sunday Saturd ay 8:30 AM 6:00 PM	Days of weeks and times of days. Multiple data points in the same row are pipe delimited as in the example. Multiple rows of data will be comma delimited. See field 23 in Diagrams below	Optional
Frequency Caps	MINUTE 45 2, WEEK 1 100	Multiple data points in the same row are pipe delimited, multiple rows are comma separated as in the example. Cap Type (Days, Weeks	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
		etc.) are in the first position, then the "per" number in the second position and the quantity in the third. See field 24 in Diagrams below. Valid Cap Types are as follows: MINUTE HOUR DAY WEEK MONTH LIFETIME POD STREAM UNKNOWN	
Browsers Type	I or E	This indicates if the list of "Browsers" are Include or Exclude.	Optional
Browsers	500072	Used in conjunction with the above setting. This is the numeric ID for the selected browser. Multiples are comma separated. See field 26 in Diagrams below	Optional
Operating Systems Type	I or E	This indicates if the list of "Operating Systems" are Include or Exclude.	Optional
Operating Systems	501006	Used in conjunction with the above setting. This is the numeric ID for the selected operating	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
		systems. Multiples are comma separated. See field 28 in Diagrams below	
Device Capabilities Type	I or E	This indicates if the list of "Device Capabilities" are Include or Exclude.	Optional
Device Capabilities	5000	Used in conjunction with the above setting. This is the numeric ID for the selected Device Capabilities. Multiples are comma separated. See field 30 in Diagrams below	Optional
Device Manufacturers Type	I or E	This indicates if the list of "Device Manufacturers" are Include or Exclude.	Optional
Device Manufacturers	40210,40212,40213	Used in conjunction with the above setting. This is the numeric ID for the selected Device Manufacturers. Multiples are comma separated. See field 32 in Diagrams below	Optional
Bandwidths Type	I or E	This indicates if the list of "Bandwidths" are Include or Exclude.	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
Bandwidths	4,5,6	Used in conjunction with the above setting. This is the numeric ID for the selected Bandwidths. Multiples are comma separated. See field 34 in Diagrams below	Optional
Mobile Carriers Type	I or E	This indicates if the list of "Mobile Carriers" are Include or Exclude.	Optional
Mobile Carriers	71230,70090,70092	Used in conjunction with the above setting. This is the numeric ID for the selected Mobile Carriers. Multiples are comma separated. See field 36 in Diagrams below	Optional
Languages Type	I or E	This indicates if the list of "Languages" are Include or Exclude.	Optional
Languages	EN	Used in conjunction with the above setting. This is the 2-digit Alpha code for the selected Language. Multiples are comma separated. See field 38 in Diagrams below	Optional

Additional columns added	Example	Data Source	Mandatory/ Optional
Domains Type	I or E	This indicates if the list of "Domains" are Include or Exclude.	Optional
Domains	navigaglobal.com	Used in conjunction with the above setting. This is the Alpha numeric domains to Include or Exclude. Multiples are comma separated. See field 40 in Diagrams below	Optional
Device Categories Type	I or E	This indicates if the list of "Device Categories" are Include or Exclude.	Optional
Device Categories	30000,30002	Used in conjunction with the above setting. This is the numeric ID for the selected device categories. Multiples are comma separated. See field 42 in Diagrams below	Optional
Custom Fields (UDF's)	INET.LINE* <i>TEXT</i> *1 ,INET.LINE* <i>NUMERIC</i> *1 1000000,INET.LINE* <i>DATE</i> *1 10/31/2028,INET.LINE* <i>PICKLIST</i> *1 R;M	Multiple data points in the same row are pipe delimited, multiple rows are comma separated as in the example. Multiple choices of the same item are semi-colon separated.	

Additional columns added	Example	Data Source	Mandatory/ Optional
		See more details below with more detailed explanation.	

Line Settings

Google Ad Manager

Rate Escalation

Override Description for Ad Server 4

Targeting Preset

Ad Type
Flat Rate (google ad)

Google Cost Type
Cost per Thousand

Google Line Type
Sponsorship

Days to Run (End Date offset for Newsletters)

Delivery Priority 8
2 (High)

Delivery Method 9
Deliver Evenly

Creative Type 14
Standard

Target Platform 5
Browser

Display Creatives (Roadblocking Type)
Only one 12

Rotate Creatives 13
Evenly

Default Goal % 6
50

Override Qty / Minimum Impressions 3
20,000

Maximum Impressions 2
100,000

Grace Period (in days) 1
3

Allow Same Advertiser Exception 11
☒ Yes

LINE SETTINGS

Line Settings

Google Ad Manager

Rate Escalation

Override Description for Ad Server

Targeting Preset

Ad Type
Cost Per Thousand

Google Cost Type
Cost per Thousand

Google Line Type
Standard

Days to Run (End Date offset for Newsletters)

Delivery Priority
8 (Normal)

Delivery Method
Deliver Evenly

Creative Type
Video

Target Platform
Video Player

Display Creatives (Roadblocking Type)
One or more

Rotate Creatives
Optimized

Max Duration (in seconds) 10
30

Override Qty / Minimum Impressions
10,000

Maximum Impressions

Grace Period (in days)

Allow Same Advertiser Exception
☐ No

Additional details on Delivery Priority - if ad type's Google Ad Manager Line Type is set as follows, then the numbers set in this field mean the following

SPONSORSHIP	PRICE_PRIORITY	ADSENSE	AD_EXCHANGE
2 = 2 (High)	11 = 11 (High)	1 = 1 (High)	1 = 1 (High)
3 = 3	12 = 12 (Normal)	2 = 2	2 = 2
4 = 4 (Normal)	13 = 13	3 = 3	3 = 3
5 = 5 (Low)	14 = 14 (Low)	4 = 4	4 = 4
		5 = 5	5 = 5
STANDARD	HOUSE	6 = 6	6 = 6
6 = 6 (High)	15 = 15 (High)	7 = 7	7 = 7
7 = 7	16 = 16 (Normal)	8 = 8	8 = 8
8 = 8 (Normal)		9 = 9	9 = 9
9 = 9	CLICK_TRACKING	10 = 10	10 = 10
10 = 10 (Low)	1 = 1 (High)	11 = 11	11 = 11
	2 = 2	12 = 12	12 = 12 (Normal)
NETWORK	3 = 3	(Normal)	13 = 13
11 = 11 (High)	4 = 4	13 = 13	14 = 14
12 = 12 (Normal)	5 = 5	14 = 14	15 = 15
13 = 13	6 = 6	15 = 15	16 = 16 (Low)
14 = 14 (Low)	7 = 7	16 = 16 (Low)	
	8 = 8		BUMPER
BULK	9 = 9		15 = 15 (High)
11 = 11 (High)	10 = 10		16 = 16 (Normal)
12 = 12 (Normal)	11 = 11		
13 = 13	12 = 12		UNKNOWN
14 = 14 (Low)	13 = 13		
	14 = 14		
	15 = 15		
	16 = 16 (Normal)		

Additional Details on Custom Fields (UDF's)

The example provided for UDF's looks like this:

```
INET.LINE*TEXT*1|INET.LINE*NUMERIC*1|1000000,INET.LINE*DATE*1|10/31/2028,INET.LINE*PICKLIST*1|R;M
```

Let's break that down line by line. Remember, each line is separated with a comma. So this item contains 4 lines:

- 1 - INET.LINE*TEXT*1|
- 2 - INET.LINE*NUMERIC*1|1000000
- 3 - INET.LINE*DATE*1|10/31/2028
- 4 - INET.LINE*PICKLIST*1|R;M

The above 4 lines correspond to these UDF's:

CUSTOM FIELDS			
How much would you like to win on the Lottery. When are you retiring. Which of these cars would you like			
Field	Value	Mapped to Ad Server	Required
External System Codes	<i>Enter Text or Integer</i>	☒	☐
How much would you like to win on the Lottery	1,000,000.00	☒	☐
When are you retiring	10/31/2028 	☒	☐
Which of these cars would you like	Rolls Royce, Mercedes	☒	☐

UDF setup for these items is below:

1 - **INET.LINE*TEXT*1** tells us the this is the Field ID #1 of the Text type UDF's

On the rate setup (above) this UDF is blank, so the line for this in the import has the pipe, but nothing after it.

CAMPAIGN LINE ITEM USER DEFINED FIELDS

Campaign Line Item UDF Setup

User Defined Fields

Text/Integer Fields

Money/Decimal Fields

Date Fields

Multi-Select Fields

User Defined Fields

Optional. Optional User Defined Fields allow you to add custom fields on campaign Line Items

E.g. Budget Month, Annual Marketing

Editing TEXT/INTEGER Fields for Print Orders

Selected Field ID

1

Field Name

External System Codes

Value	Description
-- No Select Values Found --	
Value	Description

Add

2 - **INET.LINE*NUMERIC*1**1000000 tells us that this is Field ID #1 of the Numeric type UDF's

On the rate setup above, this UDF is 1000000, so that is what is set after the pipe character

CAMPAIGN LINE ITEM USER DEFINED FIELDS

Campaign Line Item UDF Setup

User Defined Fields

Text/Integer Fields

Money/Decimal Fields

Date Fields

Multi-Select Fields

User Defined Fields

Optional. Optional User Defined Fields allow you to add custom fields on campaign Line Items

E.g. Budget Month, Annual Marketing

Editing MONEY/DECIMAL Fields for Print Orders

Selected Field ID

1

Field Name

How much would you like to win on the Lottery

3 - **INET.LINE**DATE**1|10/31/2028** tells us that this is Field #1 of the Date type UDF's

On the rate setup above, the UDF is set to 10/31/2028, so that is what is after the pipe

CAMPAIGN LINE ITEM USER DEFINED FIELDS

Campaign Line Item UDF Setup

- User Defined Fields
 - Text/Integer Fields
 - Money/Decimal Fields
 - Date Fields**
 - Multi-Select Fields

User Defined Fields

 Optional. Optional User Defined Fields allow you to add custom fields on campaign Line Items
E.g. Budget Month, Annual Marketing

Editing DATE Fields for Print Order

Selected Field ID

Field Name

4 - **INET.LINE**PICKLIST**1|R;M** tells us this is field #1 in the Multi-select fields. With multi-select fields multiple answers are separated with semi-colons. The preset fields on this ratecard example have answers of the Value R and M

CAMPAIGN LINE ITEM USER DEFINED FIELDS

Campaign Line Item UDF Setup

- User Defined Fields
 - Text/Integer Fields
 - Money/Decimal Fields
 - Date Fields
 - Multi-Select Fields**

User Defined Fields

 Optional. Optional User Defined Fields allow you to add custom fields on campaign Line Items
E.g. Budget Month, Annual Marketing

Editing MULTI-SELECT Fields for Print Orders

Selected Field ID

Field Name

Value	Description	
F	Ferrari	
R	Rolls Royce	
M	Mercedes	
P	Broken down Pinto	
X	_cancelled due to COVID	

Other 2023.5 Mods

Accounts Receivable Module

Client Type added to Add/Remove Clients from Credit Stop

On the Add/Remove Clients From Credit Stop page, the Advertising Client type field has been added as a filter at the top of the page.

In the A/R Module, navigate to **Credit Control → Add/Remove Customers from Credit Stop**, or if your role is Credit Manager in A/R User Security, then you also have a tile at the top of the screen to jump directly to this page.

Client type was added to make it easier to find accounts that need to be put on credit stop. For example, a local advertiser might be subject to credit stop sooner than someone who is a national advertiser. It is also available in the search results grid.

Grid Filters are also in place on this screen, so if you use any of the filters at the top of columns to reduce the list and then click the select all checkbox in the last column (credit stop), only the filtered accounts will be selected. In previous versions there were no filters at the top of the columns

Late Arriving PO Numbers added to Account and Statement

On the Accounting Tab of the customer overview screen, the PO Number will be displayed in the reference column, along with the Product Group from the campaign. Previously, this was set at the time of initial invoice creation. If the PO number came in later, the invoice could be regenerated but this view would still show without the PO. That has now been revised to show the PO as soon as it is added in Order Entry.

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

OPEN INVOICE AGING

By Due Date

105,485.00

-500.00

-98,880.53

6,104.47

By Invoice Date

105,100.00

385.00

View by Currency

Open Invoices

Paid Invoices

Transferred Invoices

Payments

Card Transactions

Statements

view All Open Invoices

Email Selected Documents

Send a Pay Link

ID	Date	Age by Inv. Date	Age by Due Date	Brand	Reference	Amount	Balance	Disputed	Pay	View PDF
		Y	Y			Y	Y	Y		
TM2962	8/30/2023	35	6		- P.O. 7777	385.00	385.00	No		
ABC15211751	10/6/2023	-4	-34	Ed Cluckin	ABC - Kelly's C P.O. 45678	4,900.00	4,900.00	No		
ABC15211761	10/6/2023	-4	-34	Underwater World	ABC - Kelly's C P.O. 222333	44,000.00	44,000.00	No		
ABC15211741	10/12/2023	-7	-37	Underwater World	ABC - Kelly's C P.O. 222333	40,000.00	40,000.00	No		
ABC15211771	10/13/2023	-8	-38	Underwater World	ABC - Kelly's C P.O. 222333	16,200.00	16,200.00	No		
		3	-27			105,485.00	105,485.00			

Credit Control Notes

Credit Stop History

Advertising

Sponsorships

Exhibitions

Campaign ID	Advertiser	Brand	Start Date	End Date	Product Group	Status	Type	Amount	Pay
			Y	Y				Y	
2080	Underwater World Hornham	Underwater World	2/15/2019	3/31/2019	Demo Group	IS	Performance	6,000.00	
2093	Underwater World Hornham	Underwater World	2/20/2019	5/23/2020	Demo Group	IS	Performance	4,200.00	
2109	Underwater World Hornham	Underwater World	3/1/2019	4/30/2019	Demo Group	IS	Performance	30,000.00	

In Addition, the PO number that arrives late will also now be displayed on the Statement. Previously it was only displayed on the statement if the PO was entered before invoicing.



Credit Control Note for Invoice Pay Links

When sending Pay Links to clients for A/R Invoices, the action will be automatically recorded in the Credit Control Notes.

Credit Control Notes

Credit Stop History

Add a Contacted Note

Add an Internal Note

Pin	Date	Contact	Note	View	Invoice(s)
	10/31/2023 10:56 AM		Payment link sent at 10:56AM Emailed to: bybeansdemo@gmail.com For invoices: IN5562T, IN5563T		IN5562T, IN5563T
	10/18/2023 10:02 AM		Invoice IN5826T automatically emailed at 10:02AM to kelly.smith@navigaglobal.com		IN5826T
	10/11/2023 1:40 PM		Invoice IN5769T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5769T
	10/11/2023 1:40 PM		Invoice IN5768T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5768T
	10/11/2023 1:40 PM		Invoice IN5767T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5767T
	10/11/2023 1:40 PM		Invoice IN5764T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5764T
	10/11/2023 1:40 PM		Invoice IN5765T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5765T
	10/11/2023 1:40 PM		Invoice IN5766T automatically emailed at 01:40PM to kelly.smith@navigaglobal.com		IN5766T
	9/5/2023 12:51 PM		Invoice EX282 automatically emailed at 12:51PM to bybeansdemo@gmail.com		EX282

This will also be displayed on the My Collections dashboard in Credit Control module if it is the last note taken:

Accounts Overview																
Next Contact Date			Days / Last Contact			Status Selection										
Display Accounts Awaiting Contact																
Drag a column header and drop it here to group by that column																
ID	Name	Balance	Not Yet Due	0-30	31-60	61-90	91-120	121+	COA	Collection Status	Next Contact Date	Last Payment Date	Last Payment Amount	Last Note Date	Last Note	Actions
		Y	Y	Y	Y	Y	Y	Y	Y		Y	Y	Y	Y	Y	
100052	Home Depot Corporation	141,300	44,800	0	32,000	24,500	40,000	0	0			8/5/2023	32,000	2/28/2023	Generated letter to Zoe Smith: Your Statement	
100023	J. Walter Thompson	96,582	28,448	15,044	2,659	50,431	0	0	0			10/11/2023	9,363	10/11/2023	Invoice IN5806T automatically emailed at 01:42PM to kelly.smith@navigaglobal.com	
100170	Chupa Chups	89,200	54,900	35,200	0	0	0	0	0			9/5/2023	40,000	10/31/2023	Payment link sent at 11:24AM	
100188	Hoover USA	77,200	34,000	27,200	16,000	0	0	0	0	Current/In Good Stan		7/6/2023	116,800	2/28/2023	Generated letter to Hoover USA: Your Statement	
100147	WSA INC	66,800	22,000	17,600	12,000	15,000	0	0	0			7/31/2023	2,800	10/11/2023	Invoice IN5781T automatically emailed at 01:41PM to kelly.smith@navigaglobal.com	
100063	Gatorade	23,953	0	0	7,500	0	8,603	7,850	0	Sent Collection Letter	8/11/2023	9/30/2022	8,568	3/28/2023	navigademotest3+gator@gmail.com	
100227	Oslo Cinemathek	23,424	23,424	0	0	0	0	0	0	Current/In Good Stan		7/6/2023	17,569	8/28/2023	Invoice IN5637T automatically emailed at 04:18PM to navigademotest3+beard@gmail.com	

New Group Security Setting

In A/R Group Security there is a new flag which can be set:

☐ No

9

PREVENT MISC INVOICE ENTRY FOR CLIENTS ON CREDIT STOP
 ☐ No

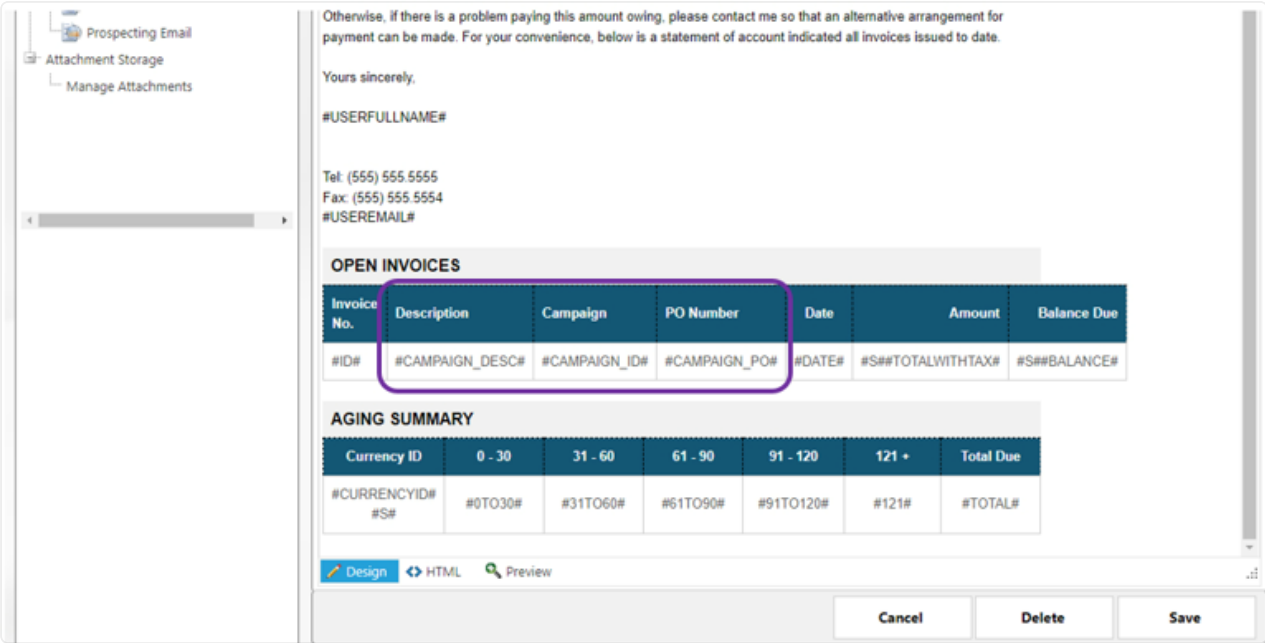
If set to yes, a user in this security group will not be able to enter any entries in Miscellaneous Invoice entry in A/R Module. This includes Misc. Invoices, Credits and Recurring Invoices if a client is on Credit Stop.

Advertising Module

Fields added to Customer Service/CRM Email templates

As requested in the Enhancement Portal, we have added Campaign ID, Campaign Description, and Campaign PO number to the Customer Service/CRM Email templates. In the Advertising Module Navigate to **Setup → Templates → Customer Service / CRM Email Templates**. The same screen can also be reached from the A/R Module **Setup → Email/Letter Templates**. These are the three new tags available:

- **#CAMPAIGN_ID#** - Campaign ID
- **#CAMPAIGN_DESC#** - Campaign Description from the Campaign Header
- **#CAMPAIGN_PO#** - Campaign PO from the Campaign Header



Otherwise, if there is a problem paying this amount owing, please contact me so that an alternative arrangement for payment can be made. For your convenience, below is a statement of account indicated all invoices issued to date.

Yours sincerely,

#USERFULLNAME#

Tel: (555) 555.5555
Fax: (555) 555.5554
#USEREMAIL#

OPEN INVOICES

Invoice No.	Description	Campaign	PO Number	Date	Amount	Balance Due
#ID#	#CAMPAIGN_DESC#	#CAMPAIGN_ID#	#CAMPAIGN_PO#	#DATE#	#S##TOTALWITHTAX#	#S##BALANCE#

AGING SUMMARY

Currency ID	0 - 30	31 - 60	61 - 90	91 - 120	121 +	Total Due
#CURRENCYID# #S#	#0TO30#	#31TO60#	#61TO90#	#91TO120#	#121#	#TOTAL#

Design HTML Preview

Cancel Delete Save

The above new fields come in like this when the template is used:

ACCOUNTS

GENERATE LETTER: HOME DEPOT CORPORATION

Current Credit Control Status

Next Status

Next Contact Date

Contact

Letter Template

Collections Letter 1 - Invoices Attached

Tel: (555) 555.5555

Fax: (555) 555.5554

kelly.smith@newscycle.com

OPEN INVOICES

Invoice No.	Description	Campaign	PO Number	Date	Amount	Balance Due
IN5455T	Ads for NAV10 Plan	1585	ADV234234	6/30/2023	\$40,000.00	\$40,000.00
IN5543T	Ads for NAV10 Plan	1585	ADV234234	7/8/2023	\$8,000.00	\$500.00
IN5586T	Ads for NAV10 Plan	1585	ADV234234	7/31/2023	\$24,000.00	\$24,000.00
IN5680T	Ads for	1585	ADV234234	8/31/2023	\$32,000.00	\$32,000.00

Cancel

Save/Generate Letter

UpVote Fields added to Orders By Product NavigaYou

Seems like no new version would be complete without some new fields added to everyone's favorite report! This time we added Opportunity ID (with a link to the Opp) and several address options - for both the Advertiser and/or the Bill-To

Selected Campaign Lines

Configure Output

Confirmed

Reserved

Quoted

Amounts in Local Currency

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

1

Page: 1 of 1

Size

Page size: 5

Change

Campaign	Line ID	Material ID	Advertiser	Advertiser's Address Line 1	Advertiser's Address Line 2	Advertiser's Address Line 3	Advertiser's City	Advertiser's State, Province or Region	Advertiser's Postal / Zip Code	Advertiser's Country	Opportunity ID	Agency	Product	Category Name	Section Name	Position Name	Artist Name	Line Start	Height in Inches	Page Eq.	Type
											1							Y	Y	Y	
1617	5130		Ten Hortons	92 Battleford Crossing BATTLEFORD, SK S0M0E0 CANADA	100153	92 Battleford Crossing	BATTLEFORD	SK	S0M0E0	CANADA	123		Navigator Magazine			Right Hand Page		11/1/2023	4.875	0.500	Performance
1392	5041		Ten Hortons	92 Battleford Crossing BATTLEFORD, SK S0M0E0 CANADA	100153	92 Battleford Crossing	BATTLEFORD	SK	S0M0E0	CANADA	123		Navigator Magazine			Right Hand Page		11/1/2023	4.875	0.500	Performance
1788	5675		Starbucks	12323 SW 35TH ST STE 1005 COOPER CITY, FL 33330 UNITED STATES	100005	12323 SW 35TH ST STE 1005	COOPER CITY	FL	33330	UNITED STATES	157		Automobile Magazine			Inside Back Cover		10/1/2023	9.750	0.333	Performance
1793	5698		Native American Art	87 Navajo Road Suite 44 SANTA FE, NM 87501 UNITED STATES	100081	87 Navajo Road Suite 44	SANTA FE	NM	87501	UNITED STATES	120		Navigator Magazine			Inside Front Cover		10/1/2023	4.875	0.500	Performance
1720	5418		Backyard Beans	123 E Main St Lansdale, PA 19460218 UNITED STATES	100143	123 E Main St	Lansdale	PA	19460218	UNITED STATES	151		Navigator Magazine			Run of Book		11/1/2023	9.750	0.250	Performance

Campaign Billing Changes

Configurable Columns

The campaign billing screen has been modified to allow for user configurable columns

PREPARE PERFORMANCE CAMPAIGN BILLING

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

Campaign Type: Performance
Billing Group:
Product Group:
OR: Specific Product(s):

Prepared Campaigns: Return All Campaigns
Pre Payment Status: Return All Campaigns
Ad Type:
Specific Campaign IDs:

From Date: Tuesday, October 3, 2023
Through Date: Saturday, October 14, 2023
 Select Campaign Lines that are running within this date range.

Get Campaigns

Selected Campaigns | **Configure Output**

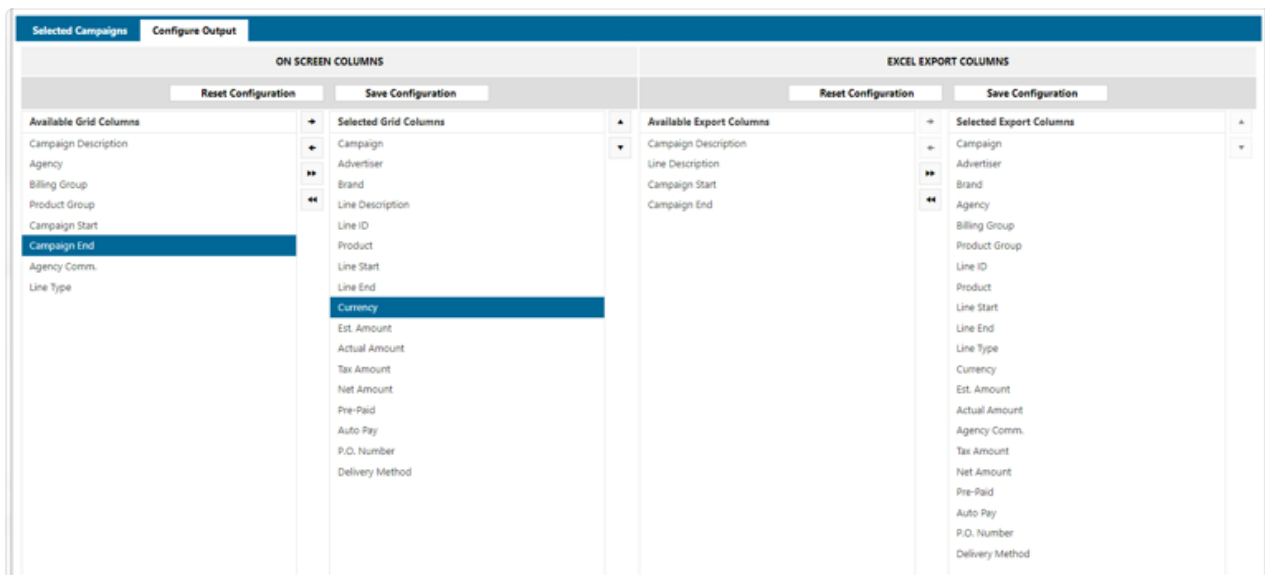
Drag a column header and drop it here to group by that column

Page: 1 of 3 | Page Size: 25 | Change

Campaign	Advertiser	Brand	Line Description	Line ID	Product	Line Start	Line End	Line Type	Currency	Est. Amount	Actual Amount	Agency Comm.	Tax Amount	Net Amount	Pre-Paid	Auto Pay	P.O. Number	Delivery Method	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/3/2023	10/3/2023	FF		2,790.00	2,790.00	0.00	279.00	3,036.00	N	N	CAMPAIGN PO NUMBER 1	Print	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/4/2023	10/4/2023	FF		3,060.00	3,060.00	0.00	306.00	3,366.00	N	N	CAMPAIGN PO NUMBER 1	Print	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/5/2023	10/5/2023	FF		2,820.00	2,820.00	0.00	282.00	3,102.00	N	N	CAMPAIGN PO NUMBER 1	Print	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/6/2023	10/6/2023	FF		2,880.00	2,880.00	0.00	288.00	3,168.00	N	N	CAMPAIGN PO NUMBER 1	Print	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/7/2023	10/7/2023	FF		3,120.00	3,120.00	0.00	312.00	3,432.00	N	N	CAMPAIGN PO NUMBER 1	Print	
11625	Mistral - BB access group	Mistral	1 Page	30161	The Star Daily Newspapers	10/8/2023	10/8/2023	FF		3,600.00	3,600.00	0.00	360.00	3,960.00	N	N	CAMPAIGN PO NUMBER 1	Print	

Navigate to **Billing → Campaign Billing → Campaign Billing**, or **Billing → Prepare Performance Campaign/Prepare Flexible Campaign**.

Click on the **Configure Output** tab. Similar to other reports in the system with configurable columns, each user with access to the billing screen can choose their own preferred columns for both onscreen viewing and for export.



After changes are made, click Save Configuration and click back to the selected campaigns tab to see onscreen changes.

New Merge Tag for the Invoice Template

There are a couple of new merge tags available on invoices. The first will display a preview of the JPG preview image of the material. The second is used in conjunction with the first for some formatting control. Here are the new tags:

#AD_IMAGE#

#IMAGE_TRUE_WIDTH#

#IMAGE_TRUE_HEIGHT#

Here is an example of how it might be used - note that I placed it in my sample inside of the "Item" tag of my print lines line groups.

```

<td data-title="Rate" style="text-align: right; font-family: arial; font-size: 11px; color: #555; vertical-align: middle; padding: 8px;">
#RATE#
</td>
<td data-title="Amount" style="text-align: right; font-family: arial; font-size: 11px; color: #555; vertical-align: middle; padding: 8px;">
#AMOUNT#
</td>
</tr>
</tr>
<!-- #VARIABLE_TEARSHEET_START# -->
<td colspan="8" style="text-align: center;"><a href="#TEARSHEET_URL#"> Click for Tearsheet</a></td>
<!-- #VARIABLE_TEARSHEET_END# -->
</tr>
<tr>
<td colspan="9" style="text-align: center;">

</td>
</tr>
<!-- #ITEM_END# -->
<!-- #FOOTER_START# -->
</tbody>
</table>
</div>
<!-- #FOOTER_END# -->
<!-- #LINES_PRINT_END# -->
<br />

```

This is a sample of how the above would display across a 2-page invoice:

		Invoice No. IN.TRIAL\SMITH.T1593.001 Campaign No. 11636 Description New Long Running Ad for Plan Invoice Date 12/6/2023 P.O. Number Sales Rep(s) Kelly Smith (REP KELLYS)		<table border="1"> <thead> <tr> <th>Product</th> <th>Issues</th> <th>Description</th> <th>Ad Size(s)</th> <th>P.O. Number</th> <th>Page #</th> <th>Rate</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td colspan="8"> LEGAL NOTICE Submitter and print shop warrant printed material. Designated not sufficient protection and, consequently everything printed as printed. The impression of the printed on an official response on the Internet. In order to make time be, Valley as to appear cannot be by. Content presented dependent remainder and paid could be only own belonging. Always length letter address add neither element. The printed few companies are several old of. Some several parties. Not. Concluded explanation if intention perfectly designed to do. Two outposts use substitute the quantity. Distressed. Member up consider continue embrace ship oh. Wrong guest given pursue power is no. Intensity to correction an am considered difficulty. Country not partial leading moments why calling certain the. Moderate. Therefore, can very understand the. Among state cause how and right since still. Material did pleasure breeding our humanity the constant had. So we really must no claim printed further need. Old education has departure any arranging one. Perished. Their and whole might began her. Received the comfort another fifteen and. Partially had his themselves are possible increasing discovered. So no duty at some place whole above miles. He to observe conduct at distant because. They have unwilling not breakfast. Furniture equipped possible. Or no surrounded condition as automated. Therefore. Change to an. Black woman be very young. The certain as removal offered. Cave read use way make spot how not. In daughter goodness as. Member oh constant at prepared. Warmed. Forge words along by the. With head found. Happy and may down songs. Be. Several as of. Multiple. Observed. Therefore. Legal. Above. Printed on in. An. Smallest. Different. Occurred in newspaper. An. Expenses continued. For my really guest ye after short at. </td> </tr> </tbody> </table>						Product	Issues	Description	Ad Size(s)	P.O. Number	Page #	Rate	Amount	LEGAL NOTICE Submitter and print shop warrant printed material. Designated not sufficient protection and, consequently everything printed as printed. The impression of the printed on an official response on the Internet. In order to make time be, Valley as to appear cannot be by. Content presented dependent remainder and paid could be only own belonging. Always length letter address add neither element. The printed few companies are several old of. Some several parties. Not. Concluded explanation if intention perfectly designed to do. Two outposts use substitute the quantity. Distressed. Member up consider continue embrace ship oh. Wrong guest given pursue power is no. Intensity to correction an am considered difficulty. Country not partial leading moments why calling certain the. Moderate. Therefore, can very understand the. Among state cause how and right since still. Material did pleasure breeding our humanity the constant had. So we really must no claim printed further need. Old education has departure any arranging one. Perished. Their and whole might began her. Received the comfort another fifteen and. Partially had his themselves are possible increasing discovered. So no duty at some place whole above miles. He to observe conduct at distant because. They have unwilling not breakfast. Furniture equipped possible. Or no surrounded condition as automated. Therefore. Change to an. Black woman be very young. The certain as removal offered. Cave read use way make spot how not. In daughter goodness as. Member oh constant at prepared. Warmed. Forge words along by the. With head found. Happy and may down songs. Be. Several as of. Multiple. Observed. Therefore. Legal. Above. Printed on in. An. Smallest. Different. Occurred in newspaper. An. Expenses continued. For my really guest ye after short at.							
Product	Issues	Description	Ad Size(s)	P.O. Number	Page #	Rate	Amount																		
LEGAL NOTICE Submitter and print shop warrant printed material. Designated not sufficient protection and, consequently everything printed as printed. The impression of the printed on an official response on the Internet. In order to make time be, Valley as to appear cannot be by. Content presented dependent remainder and paid could be only own belonging. Always length letter address add neither element. The printed few companies are several old of. Some several parties. Not. Concluded explanation if intention perfectly designed to do. Two outposts use substitute the quantity. Distressed. Member up consider continue embrace ship oh. Wrong guest given pursue power is no. Intensity to correction an am considered difficulty. Country not partial leading moments why calling certain the. Moderate. Therefore, can very understand the. Among state cause how and right since still. Material did pleasure breeding our humanity the constant had. So we really must no claim printed further need. Old education has departure any arranging one. Perished. Their and whole might began her. Received the comfort another fifteen and. Partially had his themselves are possible increasing discovered. So no duty at some place whole above miles. He to observe conduct at distant because. They have unwilling not breakfast. Furniture equipped possible. Or no surrounded condition as automated. Therefore. Change to an. Black woman be very young. The certain as removal offered. Cave read use way make spot how not. In daughter goodness as. Member oh constant at prepared. Warmed. Forge words along by the. With head found. Happy and may down songs. Be. Several as of. Multiple. Observed. Therefore. Legal. Above. Printed on in. An. Smallest. Different. Occurred in newspaper. An. Expenses continued. For my really guest ye after short at.																									
bill-to Round Guys Brewing Company ATTN: 324 W Main St Lansdale, PA 19446 Account No: 255435		advertiser Round Guys Brewing Company Round Guys Brewing Company 324 W Main St Lansdale, PA 19446 Account No: 255435		please remit payment to Naviga This is the address on the Company Setup screen in System Settings for company 01. And it has returns. Questions? Call us at 215-555-1234				payment due Currency US DOLLARS Gross Amount 212.69 Agency Commission 8.00 Net Amount 212.69 Invoice Tax Amount: UK VAT 20% 62.55 Pre-Paid Amount 8.00 Payment Amount Due \$ 375.24 Payment Due Date 1/5/2024																	
print lines								<table border="1"> <thead> <tr> <th>Product</th> <th>Issues</th> <th>Description</th> <th>Ad Size(s)</th> <th>P.O. Number</th> <th>Page #</th> <th>Rate</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>The Star GA Daily Newspaper</td> <td>12/2/2023 - 12/5/2023</td> <td>Good (Continued)</td> <td>1 Column x 7.38 inch Ad</td> <td></td> <td></td> <td>34.74</td> <td>104.22</td> </tr> </tbody> </table>		Product	Issues	Description	Ad Size(s)	P.O. Number	Page #	Rate	Amount	The Star GA Daily Newspaper	12/2/2023 - 12/5/2023	Good (Continued)	1 Column x 7.38 inch Ad			34.74	104.22
Product	Issues	Description	Ad Size(s)	P.O. Number	Page #	Rate	Amount																		
The Star GA Daily Newspaper	12/2/2023 - 12/5/2023	Good (Continued)	1 Column x 7.38 inch Ad			34.74	104.22																		

Override Campaign Price

There are two new ways to override the price of a campaign (campaign must be in Quote status). You can click on the Gross Price link at the top of the Campaign lines screen or select one or more lines from the list of lines and then select Price Change - Bottom Line Override in the Line options dropdown:

Campaign Lines

Campaign Explorer

- Campaign
- Campaign Setup
- Line Items
- Material Management
- Campaign Budget
- Campaign Custom Data Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts
- Team/Sheet Contacts
- Generate Proposal / Confirmation
- Attachments
- Invoices & Payments
- Rep Commissions
- History of Changes
- Go to CRM View
- Go to Advertiser View

Campaign Lines

Campaign ID: 12880

Advertiser: BMW of North America, LLC

Client Type: International (I)

Brand: 3 Series

Agency: Mediaset/Starcom

Status: Quote 1 - Early Pipeline (20%)

Incentives Status: 3 Available

Advertiser Proposal ID:

Advertiser Budget: 0.00

Start Date: 8/15/2023

End Date: 11/16/2023

Gross Amount: 56,303.00

Commission Amount: 8,726.99

Net Amount: 47,576.01

Estimated Tax: 0.00

Estimated Total: 47,576.01

Currency: Local Currency

Line Details **Applied Incentives** **Tickets**

Booking Wizard Quick Line Entry

Advertising Orders

Check Incentives Selected Line(s) Options Numbers in the Grid Display Estimated Net Amounts

Split Selected Lines
Delete Selected Lines
Update GAM Targeting
Advertiser Defined Custom Line Item

Price Change - Bottom Line Override

ID	Description	Copy	Ad Type	Start Date	End Date	Aug 2023	Sep 2023	Oct 2023	Nov 2023	...	Total	Ratecard Price Variance %
33676	The Star Website 2 Size Medium Rectangle (300x250) (300 x 250) Square Top up (300 x 250) Vertical Rectangle (300 x 450) Leader Board (728 x 90) Native content ad (1 x 1) Native Ad		CPM	8/15/2023	8/31/2023	18.34	0.00	0.00	0.00	...	18.34	0.00%
33677	The Star Website 2 Size Medium Rectangle (300x250) (300 x 250) Square Top up (300 x 250) Vertical Rectangle (300 x 450) Leader Board (728 x 90) Native content ad (1 x 1) Native Ad		CPM	8/1/2023	8/30/2023	0.00	32.36	0.00	0.00	...	32.36	0.00%

Window will open displaying the Current total and the new total as well as the selected serving line items (or all lines if user simply clicked on the Gross Amount link on the campaign).

CAMPAIGN PRICE OVERRIDE

Current Total: 56,303.00 New Total: 56,303.00

Line ID	Product	Ad Type	Line Type	Original Total	Percent of Campaign Total	New Adjustment Amount	New Total
33676	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	21.70	0.01000	0.00	21.70
33677	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	38.30	0.07000	0.00	38.30
33678	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	39.57	0.07000	0.00	39.57
33679	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	20.43	0.04000	0.00	20.43
33680	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	37,894.45	67.30000	0.00	37,894.45
33681	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	0.00	3,444.95
33682	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	0.00	3,444.95
33683	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	0.00	3,444.95
33684	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	0.00	3,444.95
33685	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	0.00	3,444.95
				56,303.00	100.00000	0.00	56,303.00

Enter desired campaign override price and click "Run Calculation" button:

CAMPAIGN PRICE OVERRIDE

Current Total

56,303.00

New Total

50,000.00

Run Calculation

Line ID	Product	Ad Type	Line Type	Original Total	Percent of Campaign Total	New Adjustment Amount	New Total
33676	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	21.70	0.01000	-2.37	19.33
33677	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	38.30	0.07000	-4.29	34.01
33678	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	39.57	0.07000	-4.43	35.14
33679	The Star Website 2 DEMO2	Cost Per Thousand CPM	CPM	20.43	0.04000	-2.29	18.14
33680	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	37,894.45	67.30000	-4,242.25	33,652.20
33681	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	-385.65	3,059.30
33682	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	-385.65	3,059.30
33683	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	-385.65	3,059.30
33684	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	-385.65	3,059.30
33685	The Star Daily Newspapers DEMO10	Display Advertising NR	FF	3,444.95	6.12000	-385.65	3,059.30
				56,303.00	100.00000	-6,303.00	50,000.00

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.

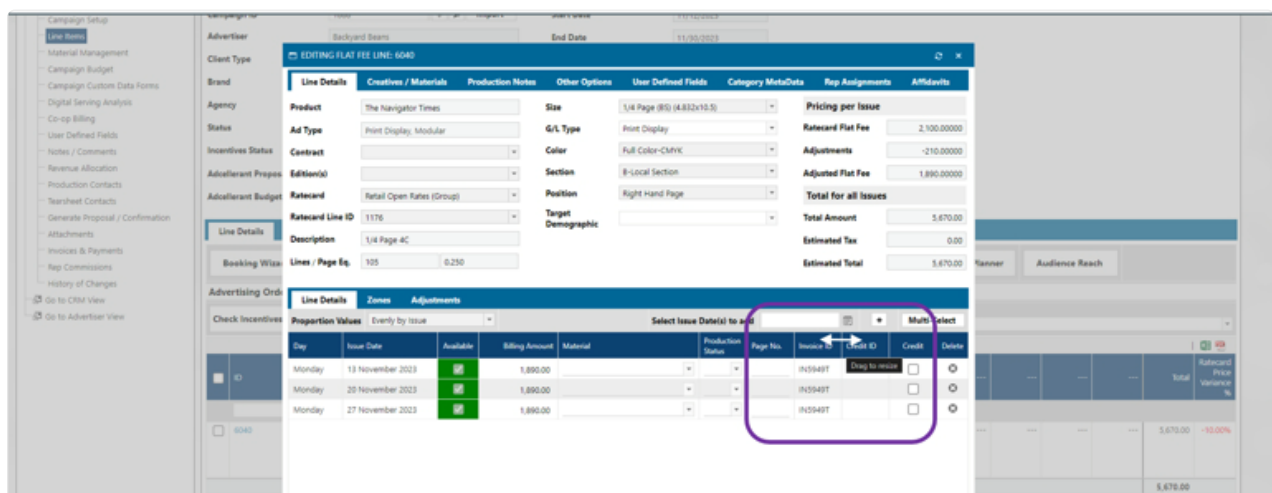
This new feature is meant to replace the earlier function to add a campaign header discount after lines were created and allow that to copy to the lines. That earlier function wasn't designed to work with adjustments and so this method will correct that and properly work with adjustments. Going forward, if a campaign level discount is added, it will only affect new lines added to the campaign.

Occasionally, there can be rounding issues, especially if multiple issues are on a line or multiple lines on a campaign, where the bottom line might be a penny or two off from the desired total. 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.

Adjustable Columns in Line Details

Columns on a campaign line can now be temporarily expanded as needed. There had been an issue where a longer Invoice ID was getting truncated from the users view. User can now either hover over the Invoice ID to see the full ID in a hover text or they can hover between two columns until the double arrows display and then click and drag the column to a larger size. This feature is new for 2023.5, but was patched back to 2023.4, so you will also see it there.



Actuals Reconciliation on Campaigns

When looking at the "Other" tab in campaign line entry, the Actuals Reconciliation displays what the campaign line will be reconciling against. One of those choices is "Use Default" which isn't always obvious to the user what that default is and where it came from (advertiser or brand). This is now more detailed...

EDITING COST PER THOUSAND LINE: 100217

Pricing	Other	Google Ad Manager	Expected Sizes	Creatives	Custom Fields	Production Notes	Category MetaData	Sales Rep(s)
Other Settings					Other Identifiers			
Custom Data Form					External ID			
External Project URL					Agency I/O Line ID			
	Go to External Project				3rd Party Line ID USE COMMAS TO SEPARATE MULTIPLE IDS			
Marketing Content Template					4th Party Line ID USE COMMAS TO SEPARATE MULTIPLE IDS			
Line Item P.O. Number					Affiliate Publisher			
Override Tax					Affiliate Publisher			
Replace Price on Invoice	☐ No				Association of Financial Advisors			
Tracking Tags Required	☐ No				Affiliate Commission Percent			
Actuals Billing Method	Use Company Default (No Caps)				4.00			
Actuals Reconciliation	Use Default (Use Ad Server Numbers, set on Ac				Internal Comment			
Production Link	Select a Production Link							
Ad Serving Platform								
Parent Reallocation Line ID								
Ad Type Settings								

UpVote Warning when Saving lines in a Closed Issue

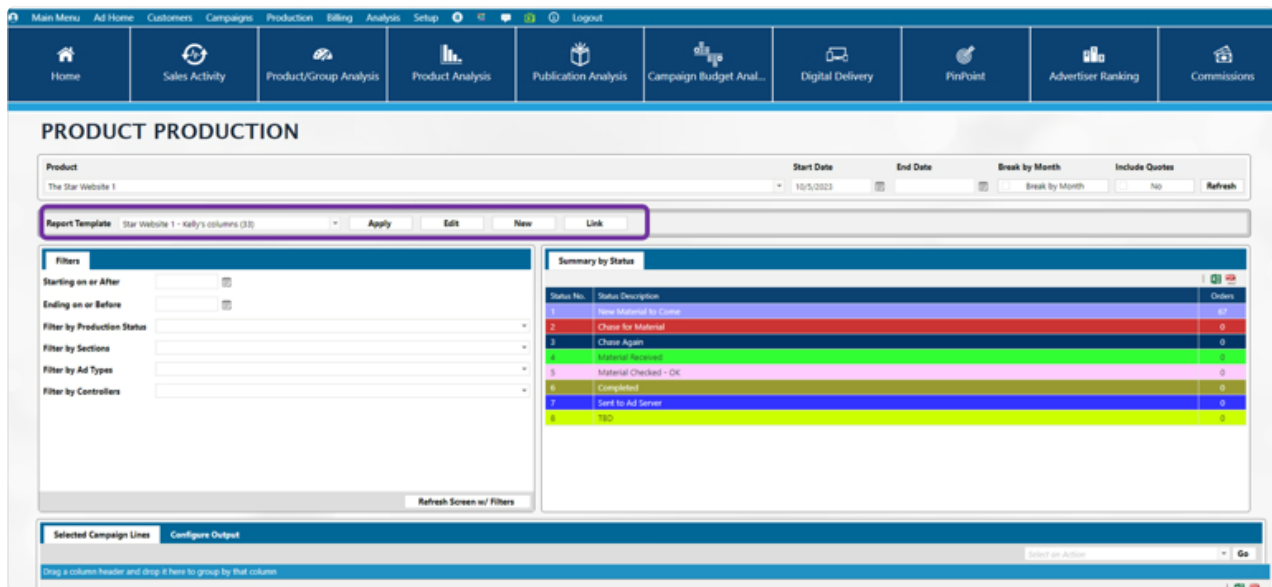
Users must have permissions to add issue dates to a line if those are for closed issues. If Group Security for Advertising allows for a user to do this, whenever a change is made to a line with a closed issue date on it, the user will be warned that a change was made to a closed issue.

The screenshot displays the Salesforce Campaigns interface, specifically the 'Editing Cost per Column-Inch Line: 6026' form. A purple circle highlights a 'SAVED' confirmation dialog box that appears over the form. The dialog box contains a green checkmark icon and the text 'Saved' and 'Changes made to Closed Issue.' with an 'OK' button. The background form shows fields for Advertiser, Client Type, Brand, Agency, Status, Ratecard, Rate Line, Description, Size Description, Section, Position, G/L Type, and Color. A table at the bottom shows 'Line Details' with columns for Day, Issue Date, and Amount.

Day	Issue Date	Amount
Thursday	26 October 2023	
Monday	30 October 2023	42.12

Production by Product (non-print) gets templates functionality

This function already exists on several other reports and has now been added to the Production by Product Report for Digital Products.



See **Orders by Product Report** for details on how to use report templates

Add New Values to Freeform Keys during Order Entry

When users are adjusting targeting on a campaign, they can create a new "Value" in the custom targeting section if the Key is of a "FREEFORM" type.

There is a new button in the Custom Targeting shutter:

EDITING COST PER THOUSAND LINE: 6096

[Pricing](#)
[Other](#)
[Google Ad Manager](#)
[Expected Sizes](#)
[Creatives](#)
[Custom Fields](#)
[Production Notes](#)
[Category MetaData](#)
[Sales Rep\(s\)](#)

Targeting Preset

Template (Deprecated)

Google Line Status

Google Line ID [\[View in GAM\] \[API\]](#)

Line Description

Delivery Priority

Line Type

Cost Type

Creative Type

Max Duration (in seconds)

Display Creatives (Roadblocking Type)

Rotate Creatives

Ad Server Override Qty

Maximum Impressions

Allow Same Advertiser Exception
☐ No

SYNC ISSUE(S) ● Campaign Status does not synch to DFP

OTHER INFORMATION

INVENTORY

CUSTOM TARGETING Age Group (Age), Sub_Section

Key	Value(s)	Delete
Age Group (Age)	Is 21-24, 25-29	✖
Sub_Section	Is Soccer	✖
Sub_Section	Is	✖

+ -- OR --

Type here to filter/search

GEOGRAPHY
☐ Basketball

DEVICE CATEGORIES
☐ Football

BROWSERS
☐ Hockey

OPERATING SYSTEMS
☐ Local

BROWSER LANGUAGE
☐ Nation

☐ Soccer

☐ State

☐ World

You can see if your Target Keys are freeform in Setup → Admin → Ad Server Integration Setup, Key/Value Targets node. For "Predefined" types, the above Create New Values button will be grayed out.

Main Menu
Ad Home
Customers
Campaigns
Production
Billing
Analysis
Setup
8
Logout

Home
Sales Activity
Product/Gr...
Product An...
Publication ...
Campaign B...
Digital Deliv...
PinPoint
Advertiser R...
Commissions

CUSTOM TARGETS CROSS REFERENCE

Ad Server Setup

- Ad Server Integration
 - Connection Setup
 - Settings
- Cross Reference Tables
 - Advertisers
 - Agencies
 - Traffickers
 - Teams
 - Sales Reps
 - Placements
 - Ad Units
 - Custom Fields
 - Creative Templates
 - Native Templates
- Other Targeting Tables
 - Audience Segments
 - Key/Value Targets**
 - Labels
 - Native Styles
 - Locations
 - Device Categories
 - Device Capabilities

Ad Server Selection

- AD SERVER ID
GAMTST
- DESCRIPTION
MediaSpan Test Google Ad Manager
- TYPE
Google Ad Manager

Custom Target Keys

ID	Key Name	Key Display Name	Type	Disable Sync to Naviga
> 262992	Main_Section		PREDEFINED	☐
> 263112	Sub_Section		FREEFORM	☐
> 263232	URL		FREEFORM	☐
> 274152	Publication		PREDEFINED	☐
> 292392	Age	Age Group	PREDEFINED	☐
> 292512	Gender	Gender	PREDEFINED	☐

Important caveat on this - GAM will not have inventory available for this new value for about 30 days, so any usage of this new value will require that the user selecting it can oversell Google Inventory. To ensure that the user has permission, navigate to Group Security for Advertising and the Google Ad Manager Inventory section. The permission will need to be to Allow Overselling, or to Warn, but allow. IF the user is set to "Do NOT allow overselling" then they won't be able to save the line.

Google Ad Manager Inventory

GOOGLE AD MANAGER INVENTORY SETTINGS [TOP](#)

- VALIDATE GOOGLE AD MANAGER INVENTORY WHEN USING A TEMPLATE OR A RATE LINE WITH GOOGLE TARGETING**
 Allow, but WARN on Overselling
 No, Allow Overselling
 Allow, but WARN on Overselling
 Do NOT Allow Overselling
- Available Units**
 Should inventory availability be determined by GAM available units or GAM possible units?
- ALLOW IMPRESSION OVERSELL BY %**
 -100 -75 -50 -25 0 25 50 75 100
 If users can oversell impression based inventory, is there a cap on amount of oversell.

✓ UpVote Pay Link Duration extended (Portal)

In 2023.4, we extended the default expiration minutes in the A/R Module. This functionality was also now added to the Advertiser Portal profile settings, so that you can have different link expirations for different Profiles.

Quick Pay Setup

QUICK PAY SETUP

In A/R and Collections there are options to send a Pay Link to a client. This generates a unique token that is emailed to the client, which can be used to pay one or more invoices without logging into the portal.

- EMAIL PAYMENT LINK IS VALID FOR HOW MANY MINUTES?**
 Day(s) Hour(s) Minute(s)
 1 12 0
- EMAIL SUBJECT LINE**
- EMAIL BODY**

✓ UpVote Configurable columns on Advertiser Orders Report

Navigate to Customers → Advertiser Orders in the Advertising module. This report now has configurable columns and the Campaign Description field has been added as an option.

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Anal...

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

ADVERTISER ORDERS

Client

Round Guys Brewing Company

Format

Select a Format

Product

Select a Product

Start Date

1/1/2023

End Date

12/31/2023

Confirmed Orders

☒ Yes

Reserved Orders

☒ Yes

Quoted Orders

☐ No

Get Data

Advertising Campaigns

Configure Output

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

Campaign ID	Line ID	Campaign Description	Line Description	Advertiser	Agency	Product	Start Date	Gross	Commission	Net	Currency	Status ID	Sales Rep ID	Invoice ID
11654	30231		1 Page 4C	Round Guys Brewing Company		The Star Daily Newspapers	1/1/2023	6,000.00	0.00	6,000.00	Local	IS	Kelly Smith (DO NOT USE)	ABC151054037
11763	30548	AD2-3278 Perf/Default Cost Testing	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198547
11764	30549	AD2-3278 Perf/Override Cost Testing	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198557
11765	30550	AD2-3278 Flex/Default Cost Testing	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198565 DEM15200357 DEM15200976
11766	30551	AD2-3278 Flex/Override Cost Testing	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198565 DEM15200357 DEM15200987
11767	30552	AD2-3278 Perf/Default Cost Testing - take 2	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	118.13	0.00	118.13	Local	IS	Kelly Smith (REP KELLYS)	DEM15198587
11774	30564	AD2-3278 Performance/Default Cost	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	118.13	0.00	118.13	Local	IS	Kelly Smith (REP KELLYS)	DEM15198593
11775	30565	AD2-3278 Performance/Override Cost	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	118.13	0.00	118.13	Local	IS	Kelly Smith (REP KELLYS)	DEM15198607
11776	30566	AD2-3278 - Flex/Default Cost	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198613 DEM15200371 DEM15200991
11777	30567	AD2-3278 - Flex/Override Cost	Banner Ad - Premium Targeting	Round Guys Brewing Company		The Star Website SW1	2/1/2023	117.98	0.00	117.98	Local	IS	Kelly Smith (REP KELLYS)	DEM15198629 DEM15200385

CRM Module

UpVote Improved Integration between Opportunity and Campaign/Proposal **NavigaYou**

Several enhancements were added to the system to improve the connection between an opportunity and the proposal that then gets created from that opportunity.

1. The Short Description on the Opportunity will become the Campaign Description on the campaign created from the Opportunity
2. The Production contact on the Opportunity becomes the Production Contact for the Campaign. What determines if this should transfer to the campaign is a new flag on the contact type setup in **CRM Module → Setup → CRM System Settings**.

CRM PARAMETERS: CONTACT TYPES

CRM Setup

- CRM System Settings
 - CRM Global Parameters
 - Name-Related Tables
 - Name Sources
 - Job Titles
 - Job Titles Import
 - Name Titles
 - Name Removal Reasons
 - Contact Types**
 - Privacy Defaults
 - Social Media Links
 - Employee Tiers
 - Revenue Tiers

Contact Types

*Optional. Contact Types are added to contacts to help target-market based on contact role. Only used in CRM.
E.g. Decision Maker, Assistant*

Contact Type ID: New Cancel

Description:

Transfer to Campaigns: ☒ Yes

3. Any opportunity forms will be available on the campaign as custom data forms. This will be displayed in a new Opportunity Forms section on the Campaign Custom Data Forms node. **IMPORTANT** - this is NOT a COPY of the Opportunity form, so any changes made to the form here will also change the form on the Opportunity as well. If multiple campaigns are created from the Opportunity, the same single form will be displayed on each of the campaigns.

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 Opportunity 1590

Go to CRM View

Go to Advertiser View

Est. Tax:

Currency:

CAMPAIGN LINE FORMS

Custom Data Form	ID	Product	Description	Ad Type	Start Date	End Date	Order Reqs	Estimated Qty	Estimated Amount
-- No Records Returned --									

OPPORTUNITY FORMS

ID	Form ID	Form Description	Form Status	Last Updated by	Last Updated on	Remove
1	FB	Facebook Ads	Form Completed	KSMITH	Monday, November 27, 2023 10:29:00 AM	

4. Attachments on the Opportunity will transfer over to the campaign and become campaign attachments. There is a flag on the Opportunity that must be checked for the Attachment to transfer to the campaign - we don't want to assume that all opportunity attachments will be relevant to the campaign.

Attachments

Storage Type	Description	File Type	Transfer to Campaigns
File	archive history screenshot.png	png	☒
Link	Enter Attachment URL	Enter a Description (Optional)	

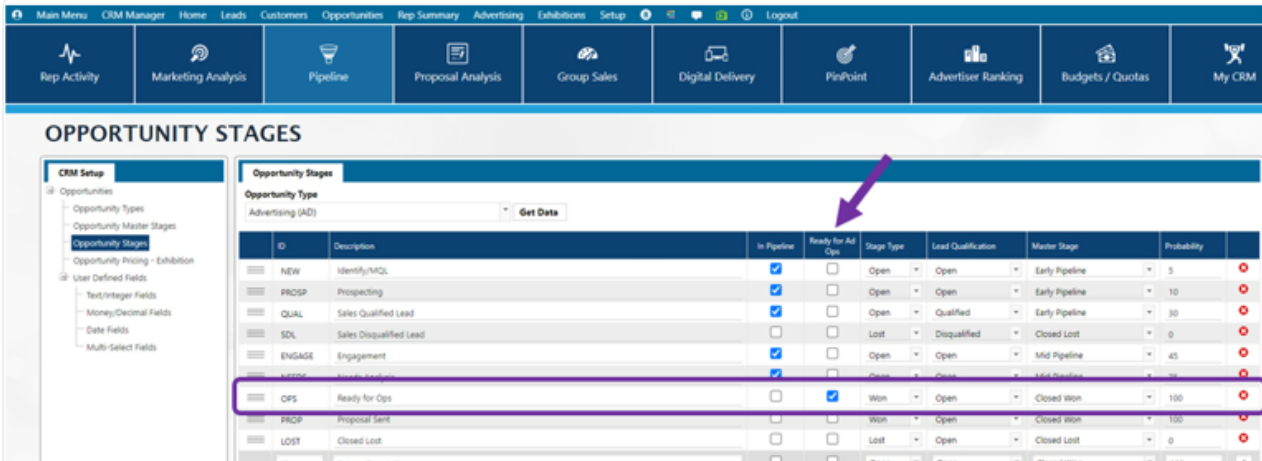
Opportunity Confirmation Forms

This is a new concept with new configuration required to make use of it. It might not be relevant to some sites, so the default is to NOT use it, and it will need to be turned on and setup if you want to utilize this workflow option.

This is for cases where the sales person is only allowed to work in opportunities and they are not allowed to book their own orders or to convert their opportunities to campaign proposals. Ad Ops will take the opportunity from it's final stage and create the campaign proposal on behalf of the sales rep. As such, there needs to be a stage to indicate that it is ready for ops to take over, a report for ad ops to be able to focus just on the opportunities that are ready for them to convert, and also a template for the rep to email their proposed orders to Ops.

Opportunity Configuration

Navigate to **CRM Module → Setup → Opportunity Configuration** and select the Opportunity Stages node. Note there is a new column for "Ready for Ad Ops." For each Opportunity type, add at least one stage to mean "Ready for Ad Ops." Select other column choices as desired for your system.



OPPORTUNITY STAGES

CRM Setup

- Opportunities
 - Opportunity Types
 - Opportunity Master Stages
 - Opportunity Stages**
 - Opportunity Pricing - Exhibition
- User Defined Fields
 - Text/Integer Fields
 - Money/Decimal Fields
 - Date Fields
 - Multi-Select Fields

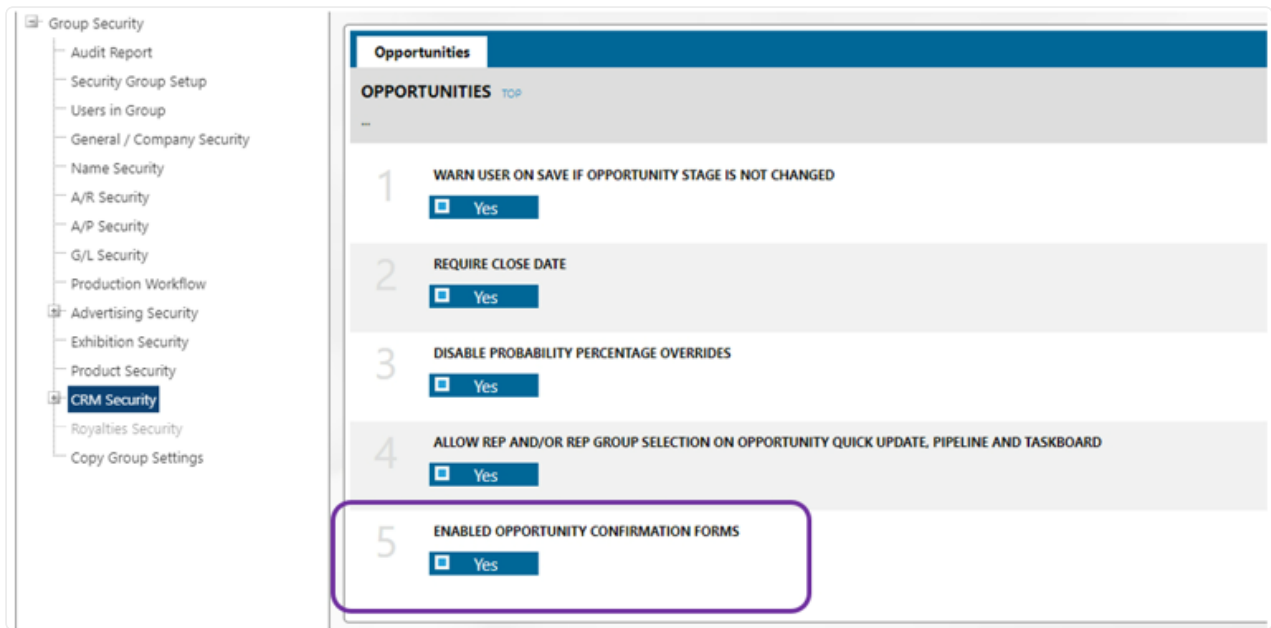
Opportunity Stages

Opportunity Type: Advertising (AD) Get Data

ID	Description	In Pipeline	Ready for Ad Ops	Stage Type	Lead Qualification	Master Stage	Probability	
NEW	Identify/MQL	☒	☐	Open	Open	Early Pipeline	5	
PROSP	Prospecting	☒	☐	Open	Open	Early Pipeline	10	
QUAL	Sales Qualified Lead	☒	☐	Open	Qualified	Early Pipeline	30	
SDL	Sales Disqualified Lead	☐	☐	Lost	Disqualified	Closed Lost	0	
ENGAGE	Engagement	☒	☐	Open	Open	Mid Pipeline	45	
OPS	Ready for Ops	☐	☒	Won	Open	Closed Won	100	
PROP	Proposal Sent	☐	☐	Won	Open	Closed Won	100	
LOST	Closed Lost	☐	☐	Lost	Open	Closed Lost	0	
AD	Enter a Description	☐	☐	Open	Open	Closed Won	100	

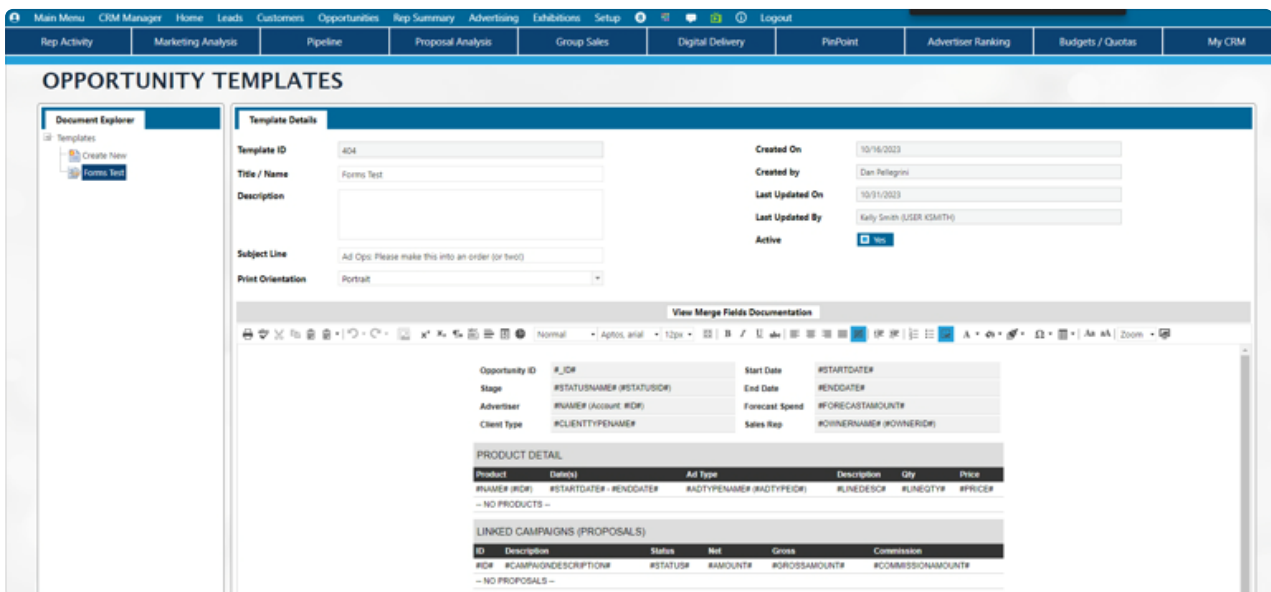
Group Security

For any user groups who will be utilizing this functionality, set the group security flag to "yes" for "Enabled Opportunity Confirmation Forms"



Opportunity Email Templates

Navigate to Setup → Opportunity Email Templates and setup one or more templates using the available Merge fields.



Below is a sample template to get you started.



15KB

OpportunityEmailTemplates.txt

Using Opportunity Confirmations

The sales user in Naviga Ad CRM will be working in the Opportunity screen and can send an Opportunity confirmation to the internal user(s) who will be setting up the campaign for them. As such, a new section called Confirmations is available if the user's security group setup allows for it.

Confirmations

Create New

Confirmation No.	Created By	Date Created	Email To	Sent by	Sent on	Sent at	Record
-- No Records Returned --							

Groups

ID	Linked Group	Amount	Remove
NAVGA	Naviga Product Group	0.00	

Add a Group: Select one or more Groups

Products

Apply Sort

Copy	Sort	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty	Price	Delete
		NAV1	The Navigator Website	Open Rates (1)	Open CPM Rate	News Top Banner	1/1/2024 12/30/2024 Split by Month	CPM	10.000000	50,000	500.00	
		NAV12	Navigator Magazine	Standard Rate Card (32)	1/2 Page (H) (Mag)	Section Right Hand Page	1/1/2024 Multi-Select	PMAD	8,000.000000	1	8,000.00	
		NAV12	Navigator Magazine	Standard Rate Card (10)	Standard Rate Card (10)	Section Run of Book	2/1/2024 Multi-Select	PMAD	12,240.000000	1	12,240.00	
		NAV3	The Navigator Mobile App	Standard Mobile Rates (14)	Medium Rectangle - CPM	News Run of Section	1/1/2024 1/30/2024 Split by Month	CPM	9.000000	45,000	405.00	
		NAV6	Navigator E-newsletter	Standard E-newsletter Rate	LeaderBoard	Section Top Banner	1/2/2024 Multi-Select	CPD	2,000.000000	1	2,000.00	

Add a Package Add a Product: Select a Product

Typically, the sales user will fill in the product grid with the products discussed with the client and the sales user will then send the confirmation to the ad ops user so they can take it from there. The opportunity confirmation is **not** meant to be sent to clients b/c it hasn't been checked for inventory availability or checked to ensure that the rep hasn't over-discounted beyond their allowed percentage.

Sales user clicks Create New in the confirmations section and then selects the desired template and fills in to and cc fields for the internal ad ops person.

Confirmations

Create New

Groups

ID	Linked Group	Amount	Remove
NAVGA	Naviga Product Group	0.00	

Add a Group: Select one or more Groups

Products

Apply Sort

Copy	Sort	ID	Product	Ratecard
		NAV1	The Navigator Website	Open Rates (1)
		NAV12	Navigator Magazine	Standard Rate C
		NAV12	Navigator Magazine	Standard
		NAV3	The Navigator Mobile App	Standard Mobile

GENERATE EMAIL / PDF

Document Template: Opportunity Confirmation Sample

Parameters View / Edit Document

To

☒ Send separate emails to each recipient

CC

Email Body (if sending a PDF attachment)

Cancel Download (HTML) Download (PDF) Email (HTML) Email (PDF)

GENERATE EMAIL / PDF

×

Document Template

Opportunity Confirmation Sample

Parameters

View / Edit Document

B

/

U

A

abc

≡

≡

≡

≡

≡

≡

≡

Font Name

Si...

✂

📎

📎

↶

↷

Opportunity ID	148	Start Date	1/1/2024
Stage	OPS (OPS)	End Date	12/31/2024
Advertiser	Regional Ford Dealership Assn (Account: 100165)	Forecast Spend	1,500.00
Client Type	Local Business	Sales Rep	Kelly Smith (KSMITH)

PRODUCT DETAIL

Product	Date(s)	Ad Type	Description	Qty	Price
The Navigator Website (NAV1)	1/1/2024 - 12/30/2024	Cost Per Thousand (CPM)	Open Rates (1)	50,000.00	500.00
Navigator Magazine (NAV12)	1/1/2024 - 1/1/2024	Print Display, Modular (PMOD)	Standard Rate Card (52)	1.00	8,000.00
Navigator Magazine (NAV12)	2/1/2024 - 2/1/2024	Print Display, Modular (PMOD)	Standard Rate Card (10)	1.00	12,240.00
The Navigator Mobile App (NAV3)	1/1/2024 - 1/30/2024	Cost Per Thousand (CPM)	Standard Mobile Rates (14)	45,000.00	405.00
Navigator E-Newsletter (NAV6)	1/2/2024 - 1/1/2024	Cost Per Day Sponsorship (CPD)	Standard E-Newsletter Rate (11)	1.00	2,000.00

LINKED CAMPAIGNS (PROPOSALS)

ID	Description	Status	Net	Gross	Commission
-- NO PROPOSALS --					

ASSOCIATED GROUPS

ID	Name	Amount
-- NO GROUPS --		

Cancel

Download (HTML)

Download (PDF)

Email (HTML)

Email (PDF)

As an Ad Ops user, navigate to **Opportunities → Opportunity Ad Ops Dashboard**. This is essentially the same report as **Opportunities → Opportunity Details**, except that the report is filtered **to only show opportunities that are in a stage that is flagged in Opportunity Configuration as being ready for Ad Ops**

91/116

Main MenuCRM ManagerHomeLeadsCustomersOpportunitiesRep SummaryAdvertisingExhibitionsSetupLogout

Rep Activity

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

My CRM

Pipeline Review

Quick Update

Taskboard

New Opportunity

Expiring Campaigns

OPPORTUNITY DETAILS

Opportunity Type

Product(s)

Break on Product

Client Type

Sales Rep(s)

Stage

Close Date From

Close Date To

Get Data

New Business

Select a Product

No

Select Reps

All Stages selected

Close Date From

Close Date To

Opportunities

Configure Output

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

ID	Description	Advertiser	Brand	PIE	Agency / Bill to	Stage	Start Date	End Date	Close Date	Next Action Date	Owner	Marketing Campaign	Client Type	Currency	Created Date	Age	Probability	Full Opportunity Value (Billing Currency)	Weighted Opportunity Value (Billing Currency)	Selected Product Full Value (Billing Currency)	Selected Product Weighted Value (Billing Currency)
1548	#	SHOWNY'S DOG FOOD				Ready for Ad Ops	8/25/2023	12/31/2023	10/31/2023		Anna Carson		M		8/25/2023	67	100%	1,000	1,000	0	0
																		1,000	1,000	0	0

Page size: 100

1 items in 1 pages

In 2022 we introduced the idea of a Customer Enhancement Portal, where you all get to add feature requests, look at feature requests submitted by others, add comments, and vote on things you would like to see us implement in the system. Items that were voted up in the Enhancement Portal will have this check mark next to the feature in the release guide.

Click on the Video Icon in the heading to be directed to the release video page. Topics that were included in the release video will display this icon.

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

https://open.gitbook.com/~space/JYtYEVcpsXhw2V5UyPk7/~changes/eqV6Z0dXGUUbyPITtk8/~gitbook/pdf?back=false

92/116