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
- Affidavit Automation
- Material Deadlines by Artwork Type
- Dynamic Classified Portal Packages
- Email Integration Monitor
- GAM - Import/Export Ratecards
- AND MORE!!
- Pre-Release info about a 23.6 Feature

ACH Processing

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 -

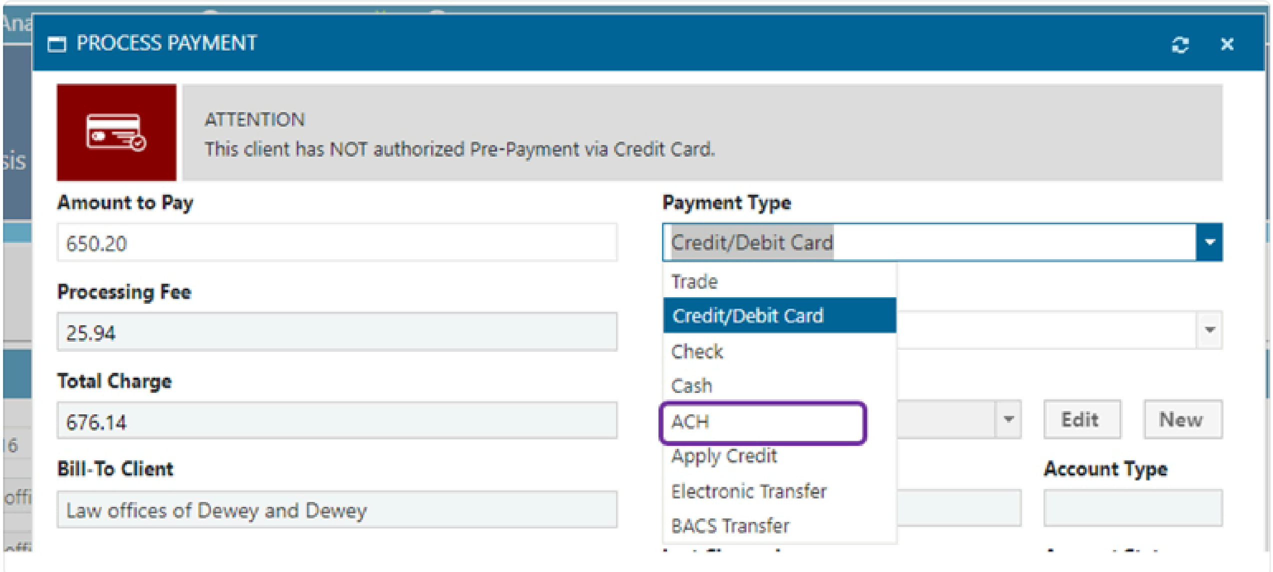
- When upgrading to this version from a version prior to 2023.5 - and you are using one of the above processors who now allow for ACH - **please put in a support ticket** to let us know when you are upgrading. There may be a small change we need to make in the back end so that payment processing continues 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

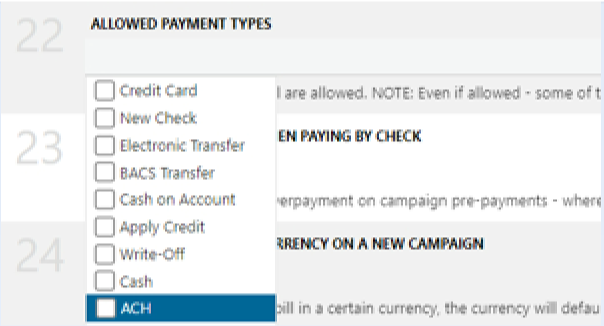
This screen is displayed in Campaign Payment Entry and A/R Invoice Payments. If ACH is enabled for your bank, you will see the "ACH" option in the dropdown for payment type. The below screen is displayed if the user enters a payment by navigating to any of the following:

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

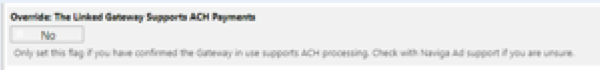


ACH will only be displayed if at least one bank is setup to support ACH, and only those banks supporting ACH will be displayed in the bank dropdown. Labels have been changed onscreen to be applicable to both ACH and Credit cards. So "Credit Card to Charge" has been relabeled "Account to Charge." "Card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

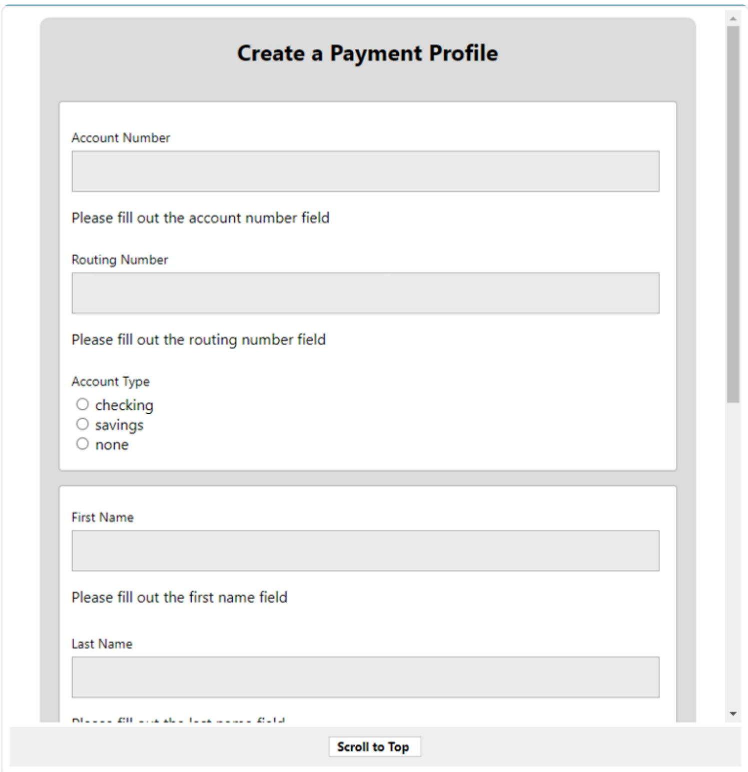
> Note - if you do not see ACH as an option in the dropdown, check Advertising Group Security. There is a setting there to limit the payment types that are available to a user. If you previously set limitations, you will need to also select ACH to allow that to be selected.



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.



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 -

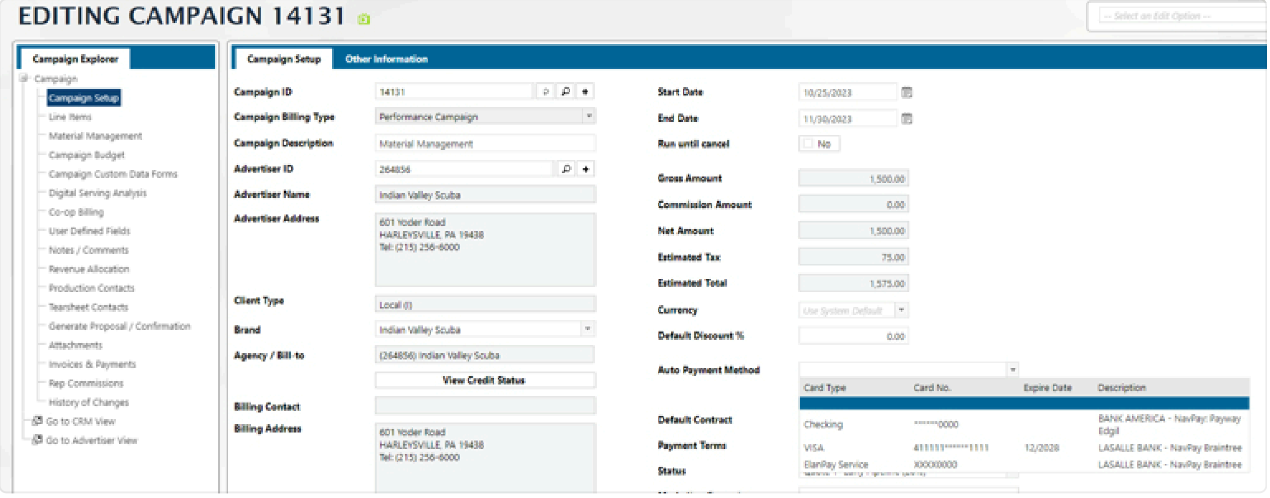


This will be saved as an account on file and will behave much like a credit card in that the masked account number can be viewed and selected to be used for transactions.

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:

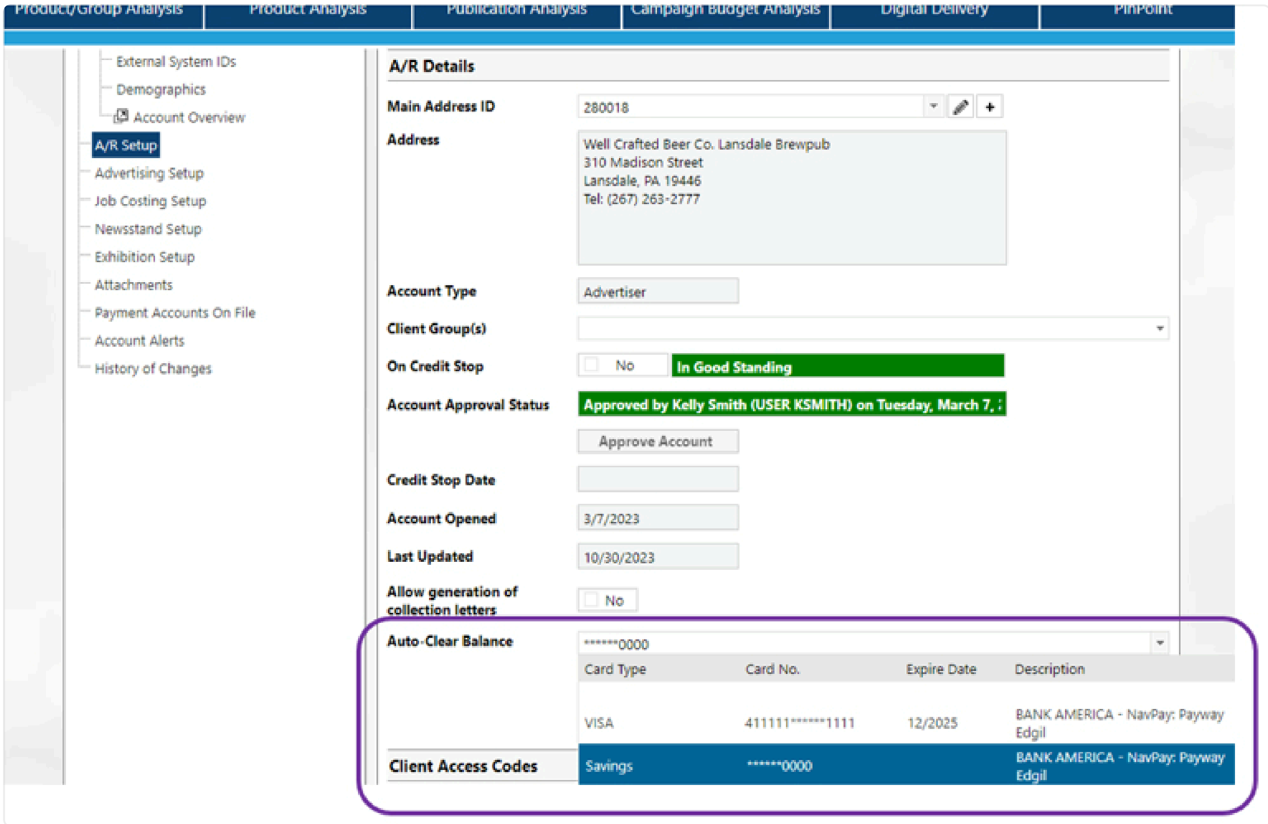


The auto pay function is not new, but having Bank Accounts available in that list is new. Previously, only credit cards were in that dropdown. Whatever account is selected in the dropdown will be used to pay the invoice during the invoice creation process.

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.



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:

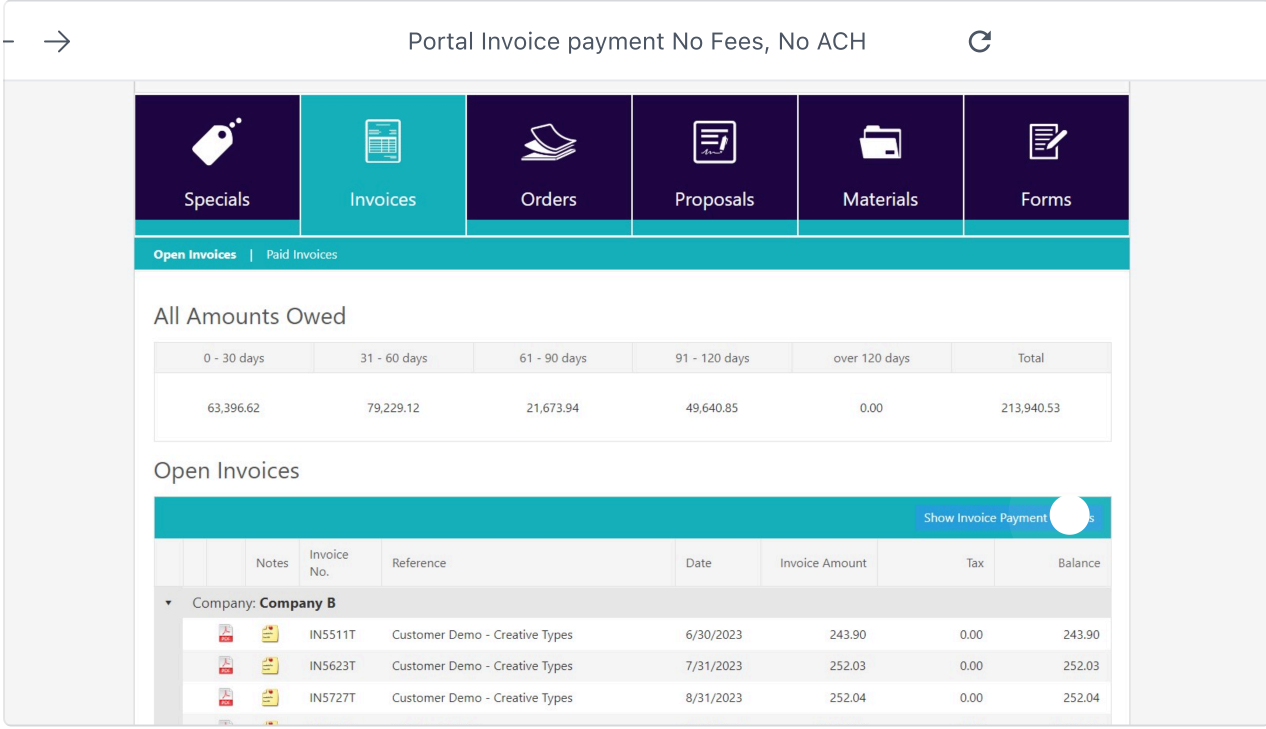
1. Fees are not enabled, and the bank is NOT set up for ACH (this method is the behavior that was available in prior releases)
2. Fees are not enabled, and the bank IS set up for ACH
3. Fees are enabled, and the bank IS set up for ACH

> 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

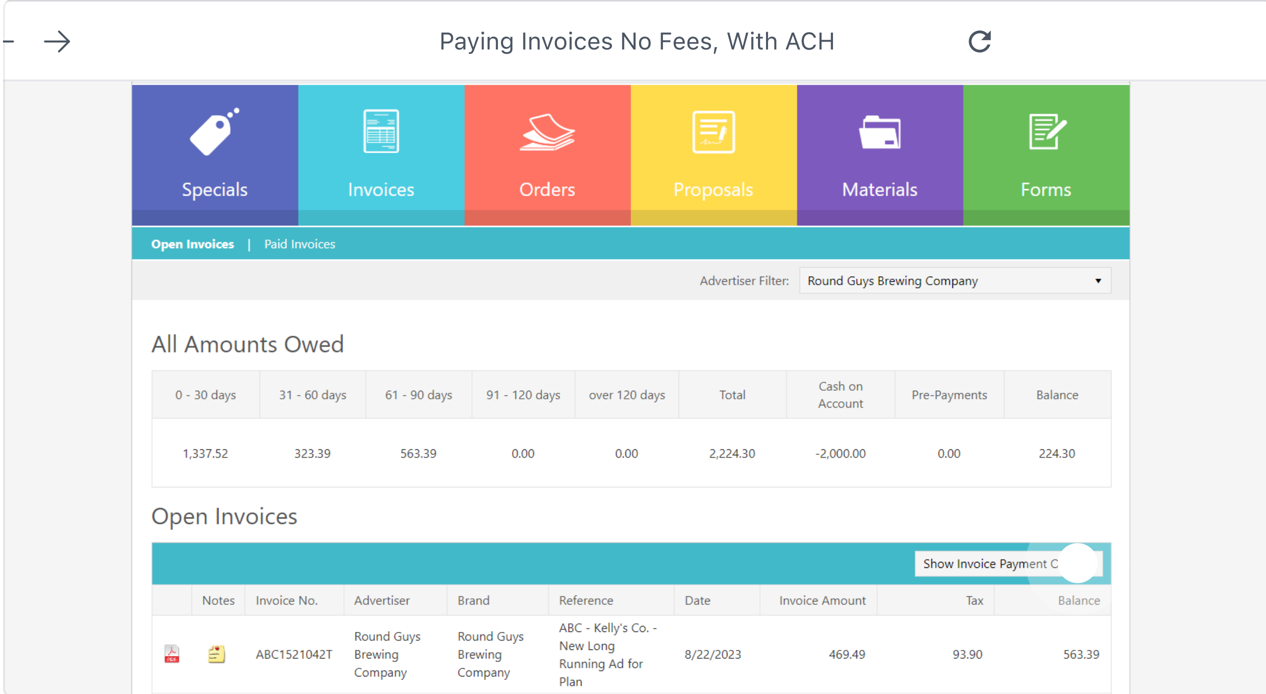
Scenario #1 - No Fees, No ACH

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):



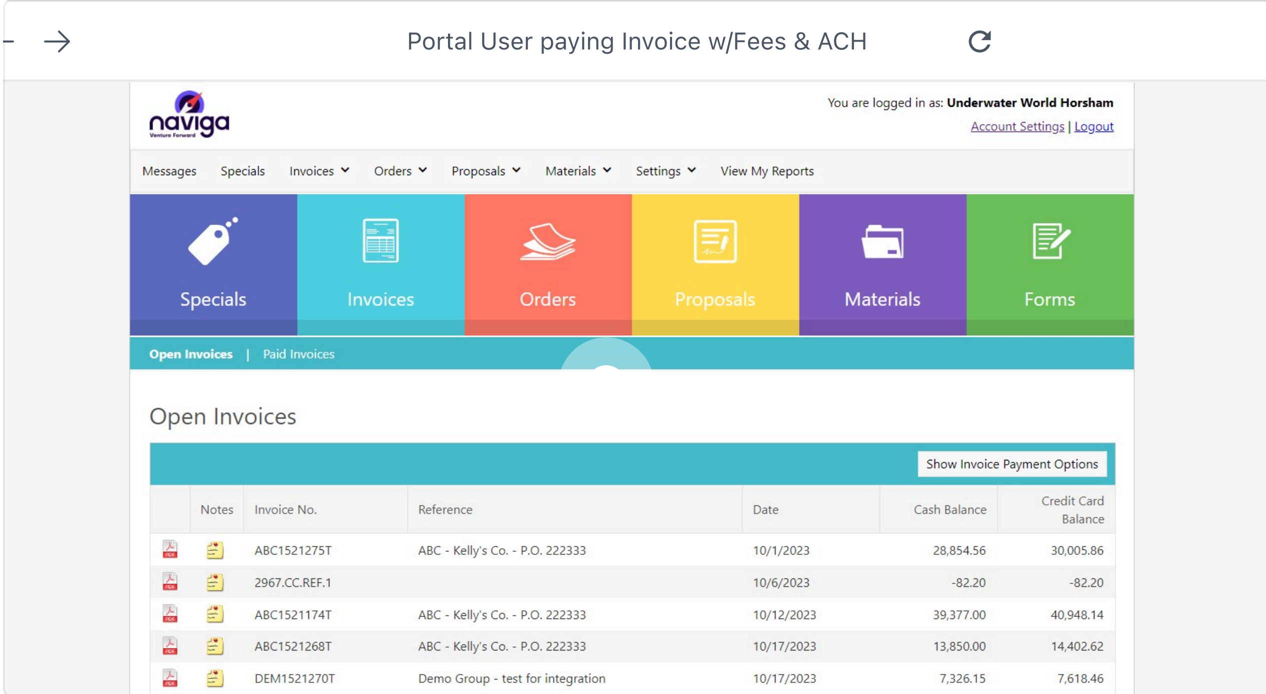
Scenario #2- No Fees, with ACH

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



Scenario #3 - With Fees, with ACH

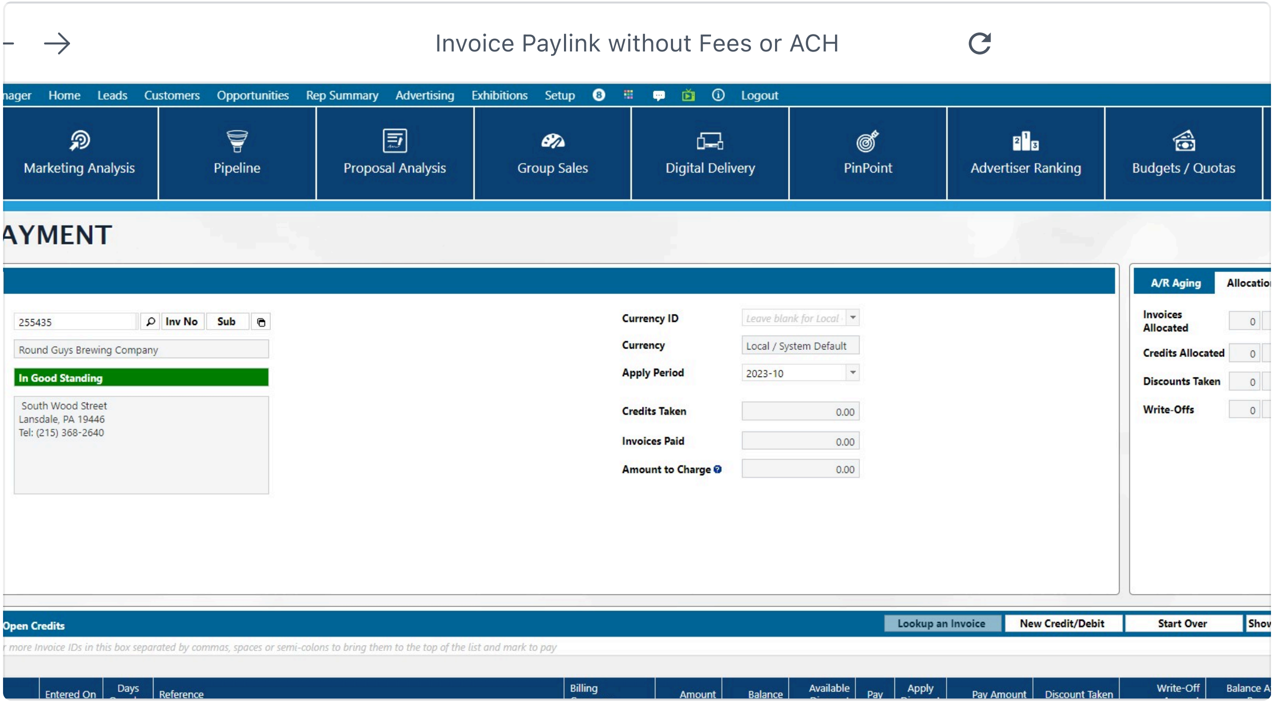
Same workflow as above, but this system has enabled Fees in A/R system settings, and has ACH in their Bank processor. In this workflow, there is no aging totals at the top, because the amounts will differ based on payment method, which might confuse the user. When User clicks on the Show Invoice payment 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.



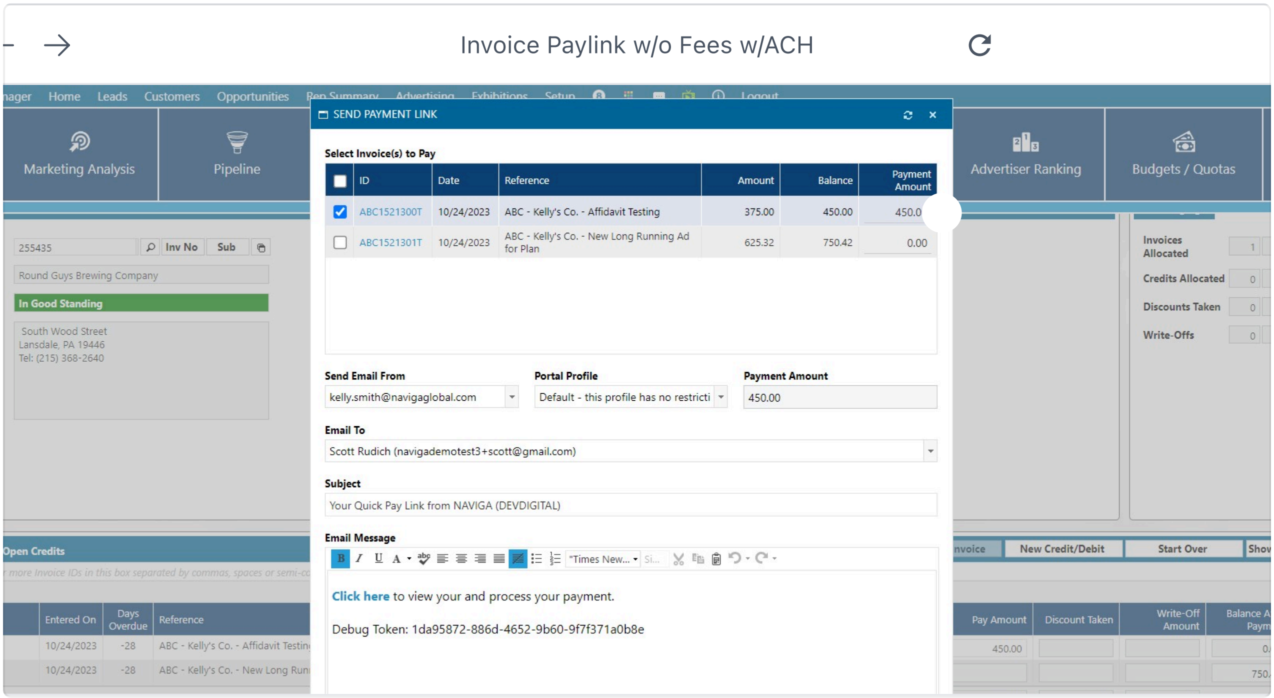
IMPORTANT - if you are using the "Individuals with Portal Access" functionality (set up via Setup → Portal Setup → Individuals with Portal Access) - we have temporarily turned off the ability to pay in the portal. This functionality will be brought back in 2024, but it needed to be re-worked to support 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

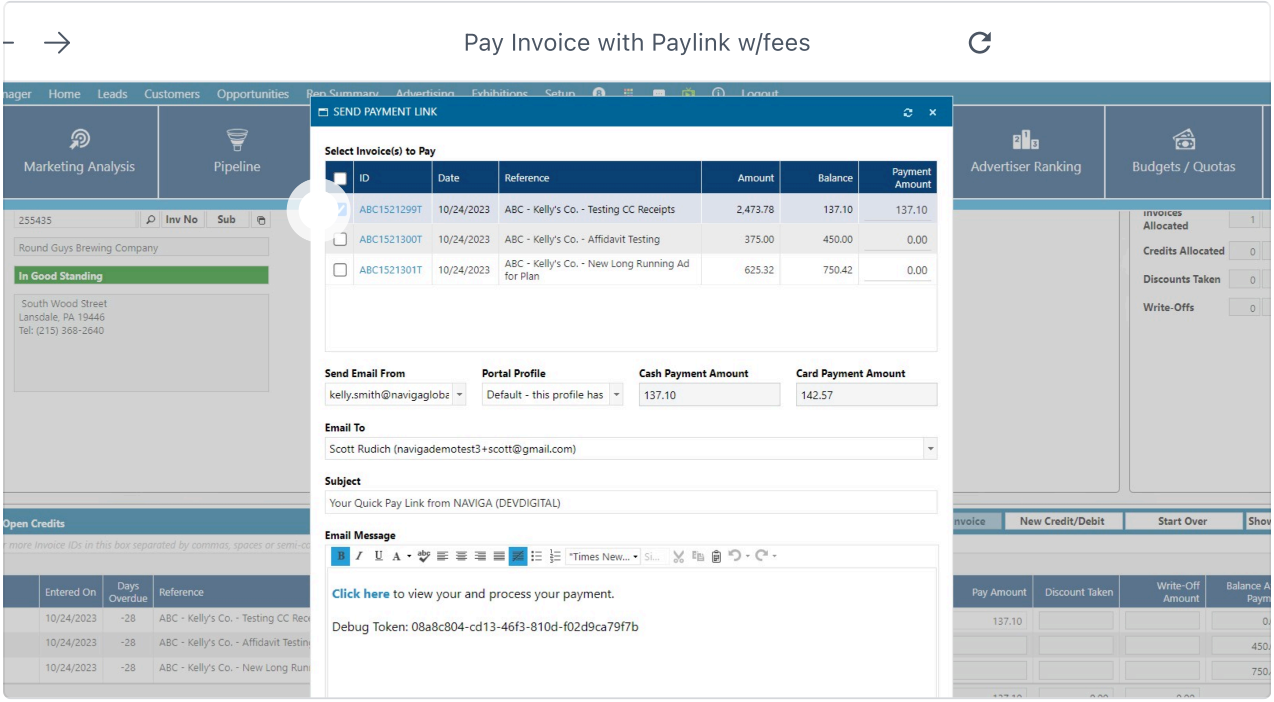


Scenario #2- No Fees, with ACH



Scenario #3 - With Fees, with ACH

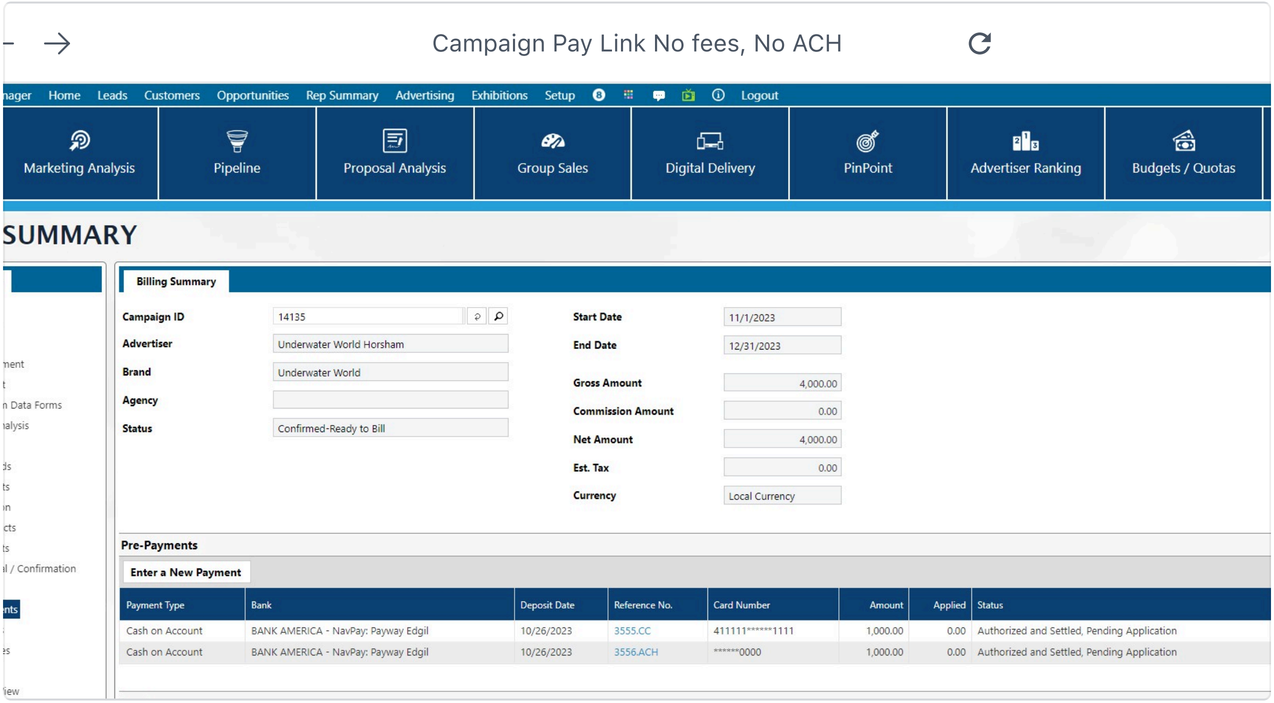
If a customer wishes to pay an invoice without logging in, a system user can send them a pay link from Naviga ad. Demo below walks you through the process for paying invoices with a pay link. For best results view in full screen by clicking the in the top right corner.



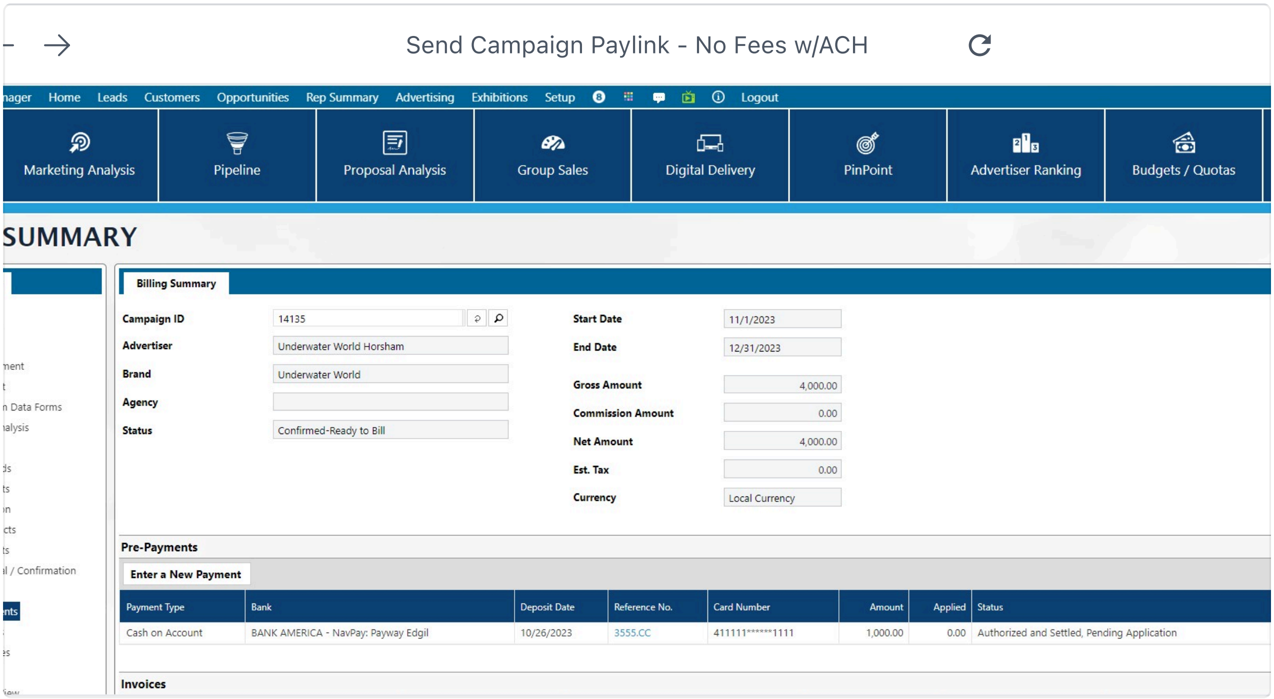
Prepay Campaign via a pay link from Naviga Ad User

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.

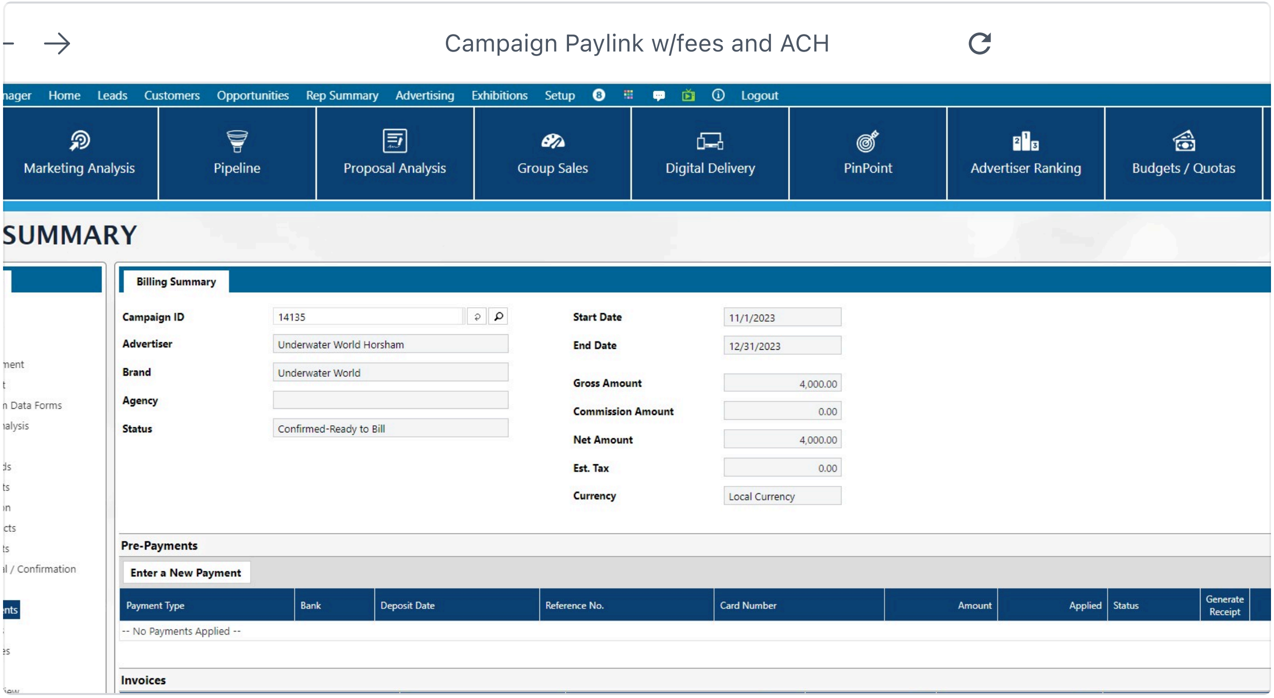
Scenario #1 - No Fees, No ACH



Scenario #2- No Fees, with ACH



Scenario #3 - With Fees, with ACH

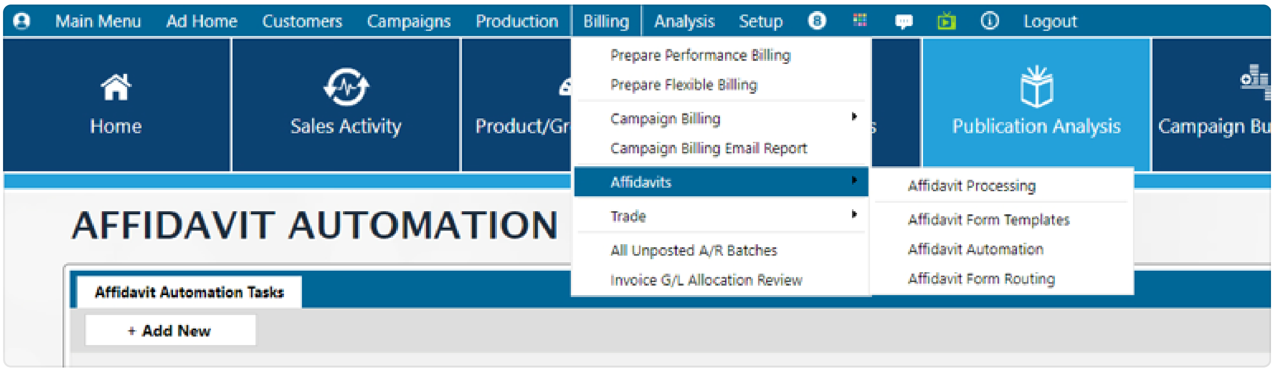

Campaign Paylink w/fees and ACH
Home Leads Customers Opportunities Rep Summary Advertising Exhibitions Setup Logout
Marketing Analysis
Pipeline
Proposal Analysis
Group Sales
Digital Delivery
PinPoint
Advertiser Ranking
Budgets / Quotas
SUMMARY
Billing Summary
Campaign ID 14135
Advertiser Underwater World 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.

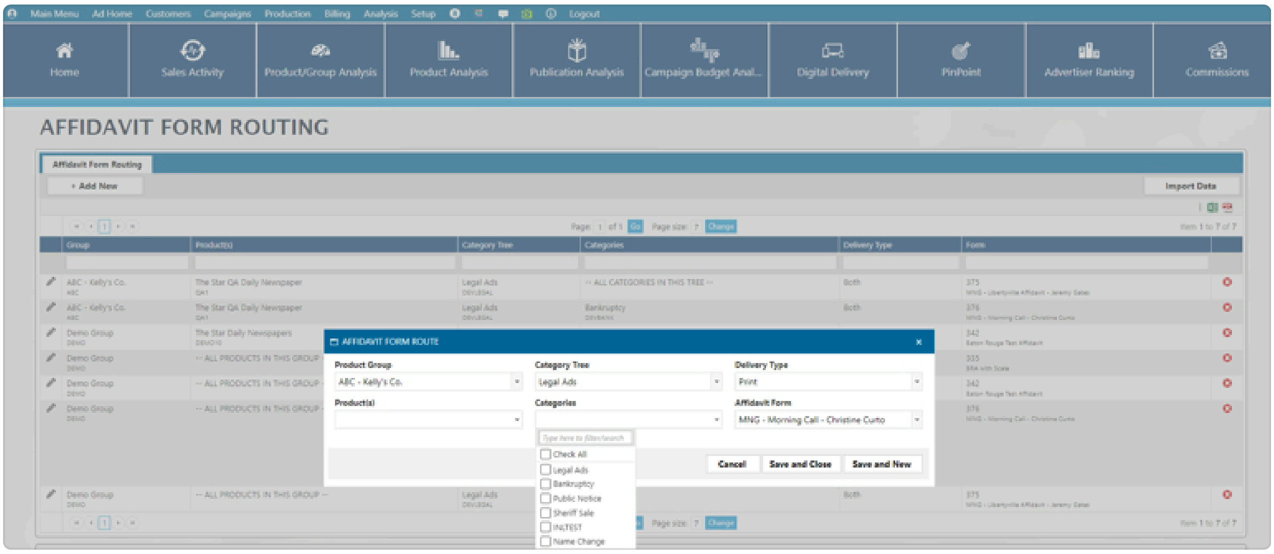
Two new screens are available form the Affidavit menu. Navigate to **Advertising Module → Billing → Affidavits** and find two new menu items: Affidavit Automation and Affidavit Form Routing



Affidavit Form Routing

Manual Entry -

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



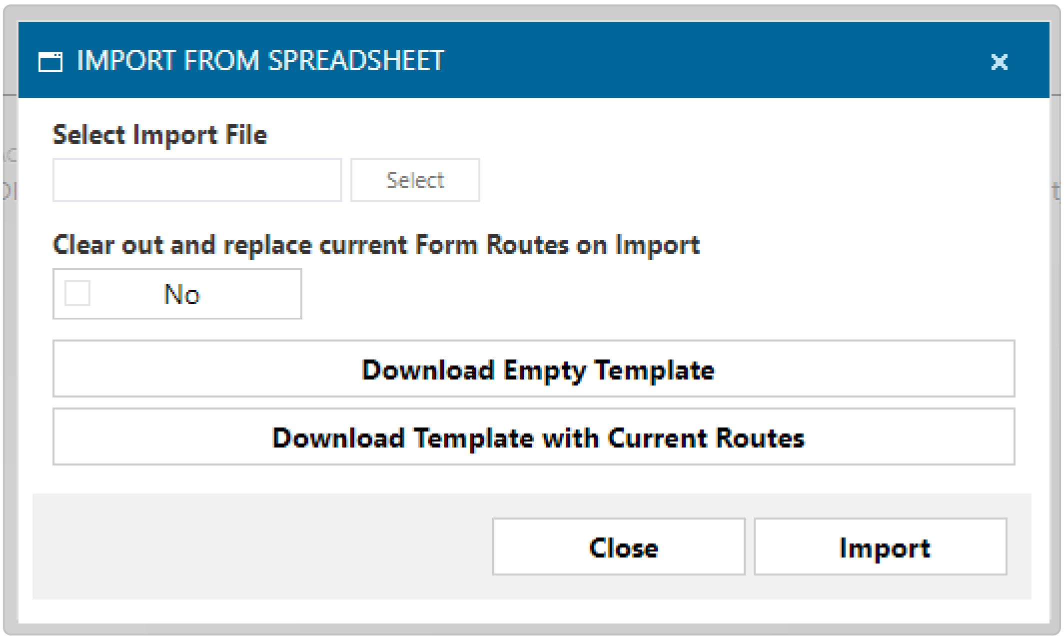
1. Select a Product Group
2. Select one or more Products, or leave blank to use rule for all products in this group.
3. Select a Category Tree
4. Select one or more Categories, or leave blank to use rule for all products in this group.
5. Select Delivery type (print, email, or both)
6. Select form to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

The system will loop though 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:



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

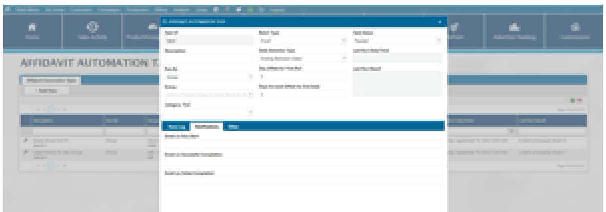
Field	Example	Infomation	Required?
Group ID	NAVIGA	Alpha-numeric ID from the Product Group Setup	Yes.
Product IDs	DEMO1	Alpha-numeric ID for the Product	No, but if left blank, rule will apply to all Products in the Product Group, which might not be

Field	Example	Infomation	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.

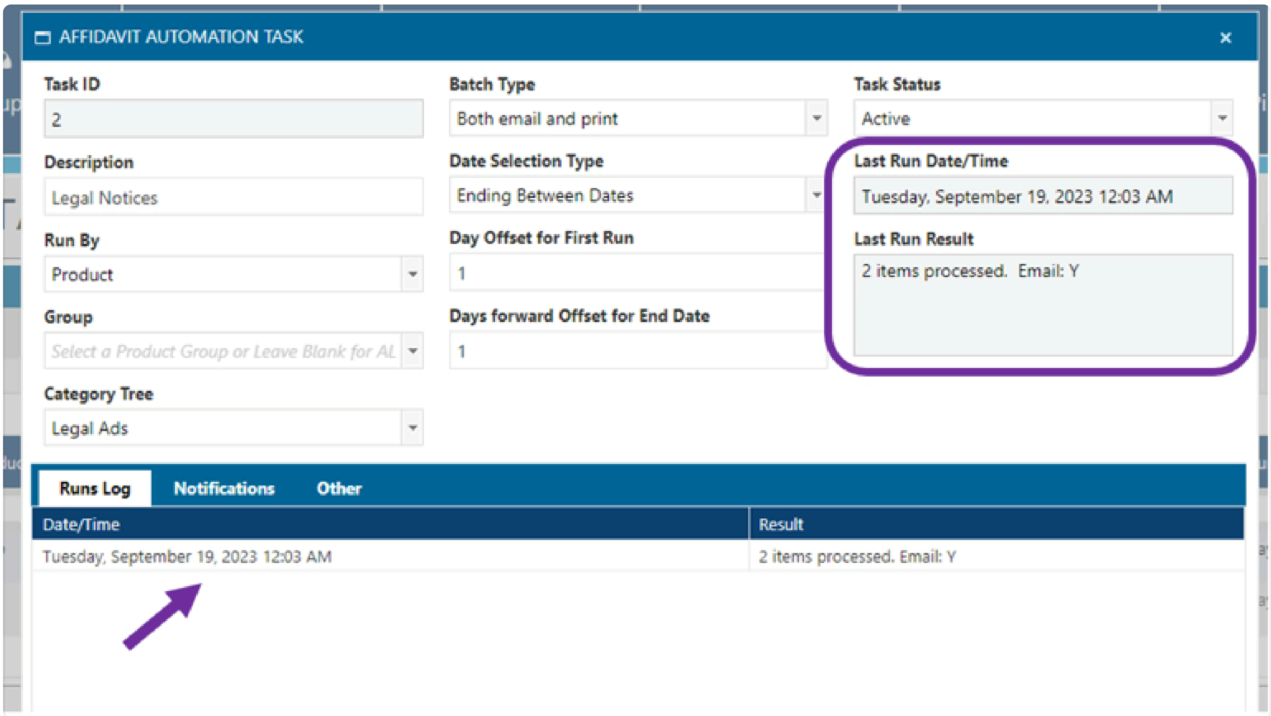
Click the + Add New button



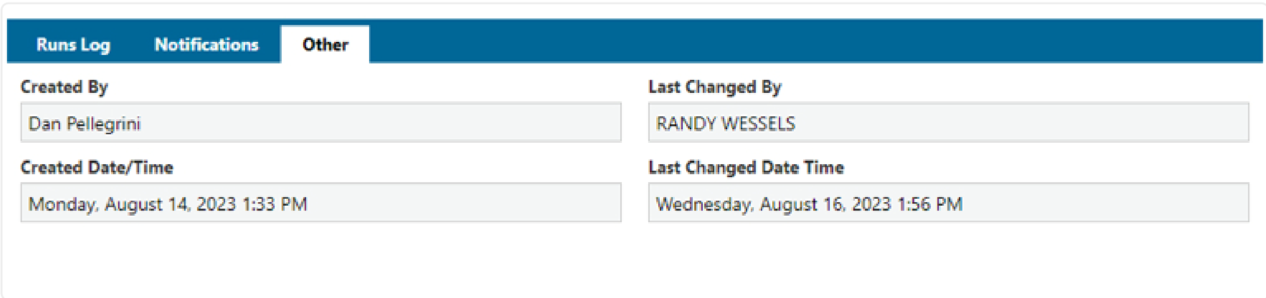
1. Enter description

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**



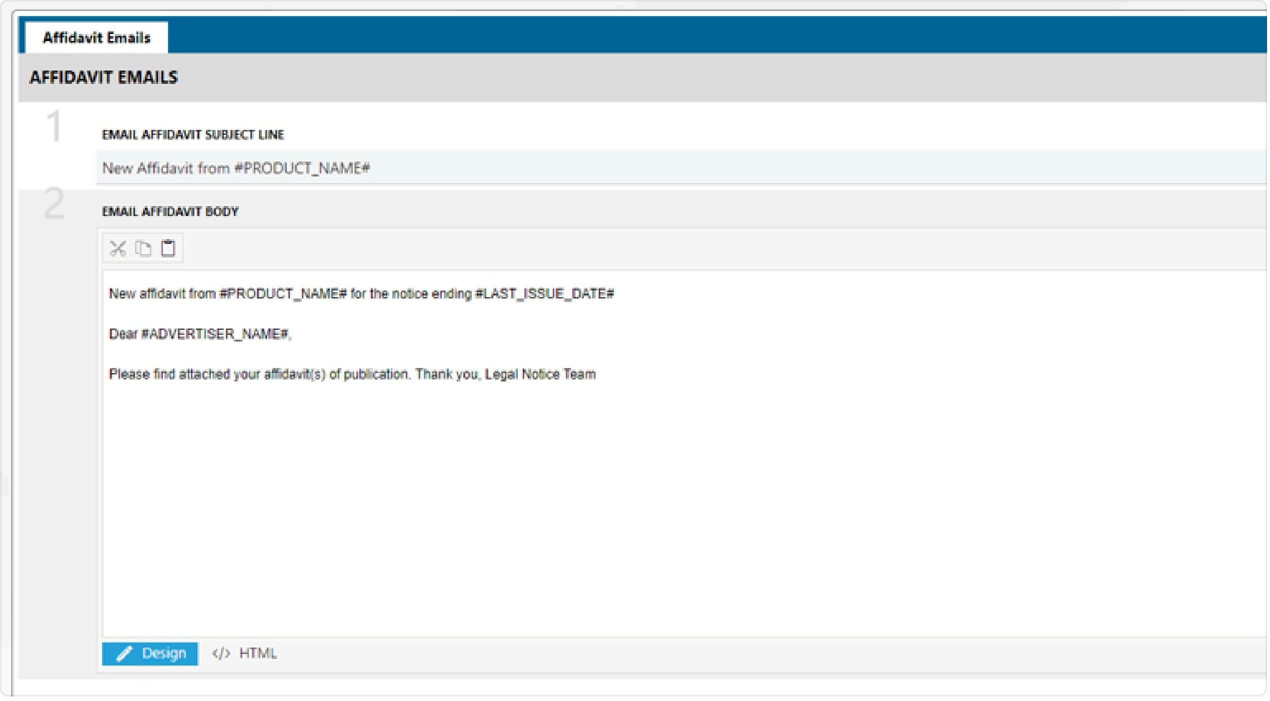
The Other tab at the bottom will display who created the automation rule, and who last updated it:



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.



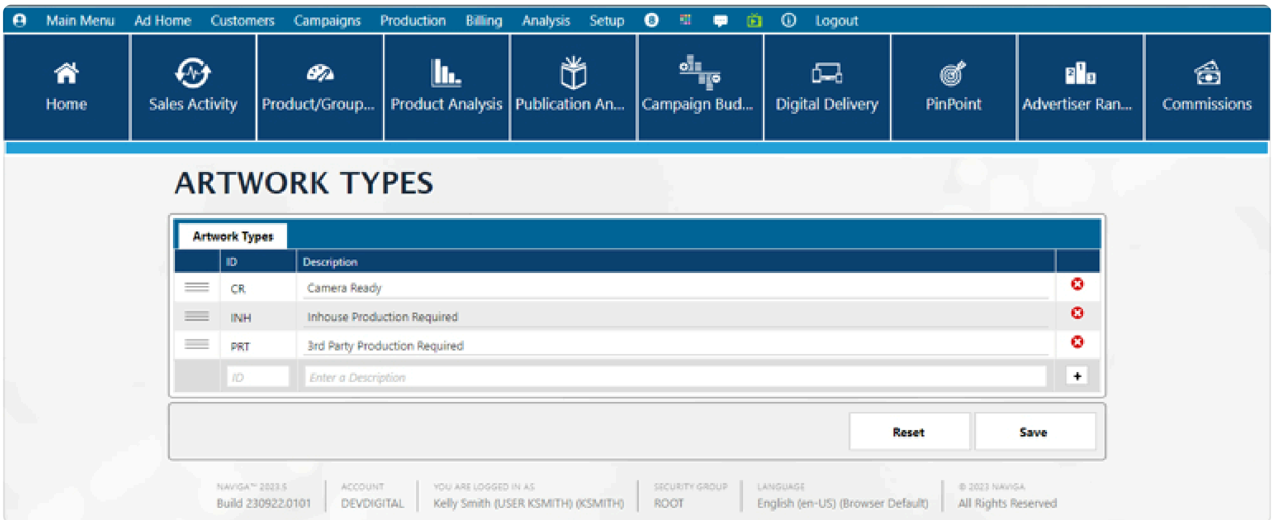
Use HTML or the design tab to configure desired message to the client. The affidavit itself will be sent as an attachment, similar to invoices and statements.

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**

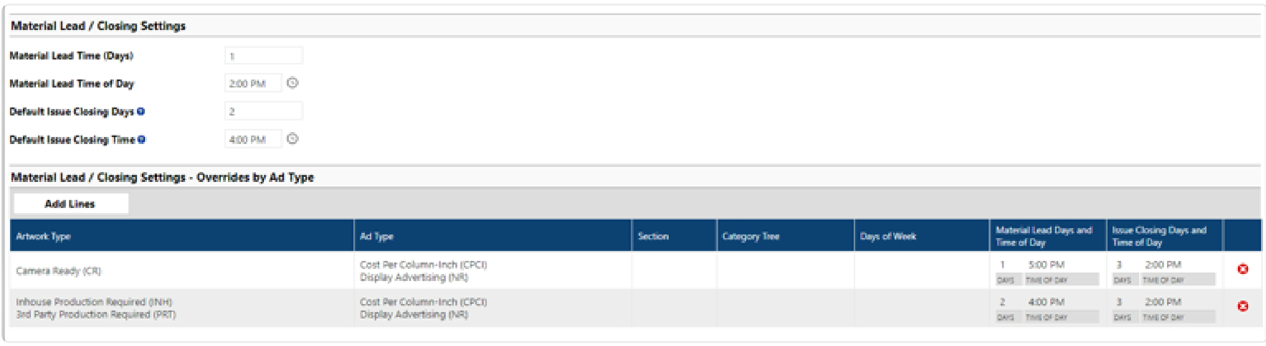
Artwork Types and Material Deadlines

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.



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.

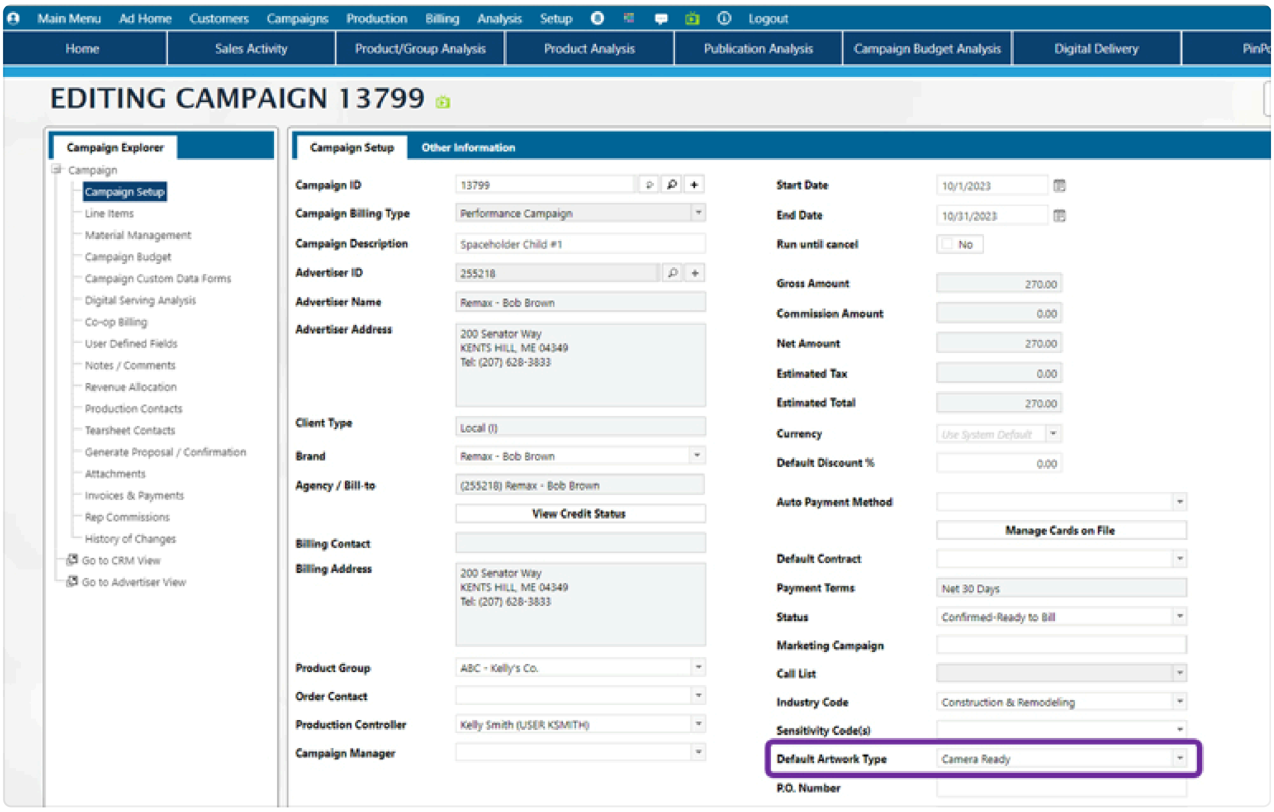


Navigate to **Setup → Product Setup** and select a product. In the Material Lead / Closing Settings - Override by Ad Type section, you can now also override by Artwork Type. This can be used to set a different deadline for supplied materials vs those created internally, or perhaps you need a longer lead time for those that are created by an outsourced designer vs in house artists.

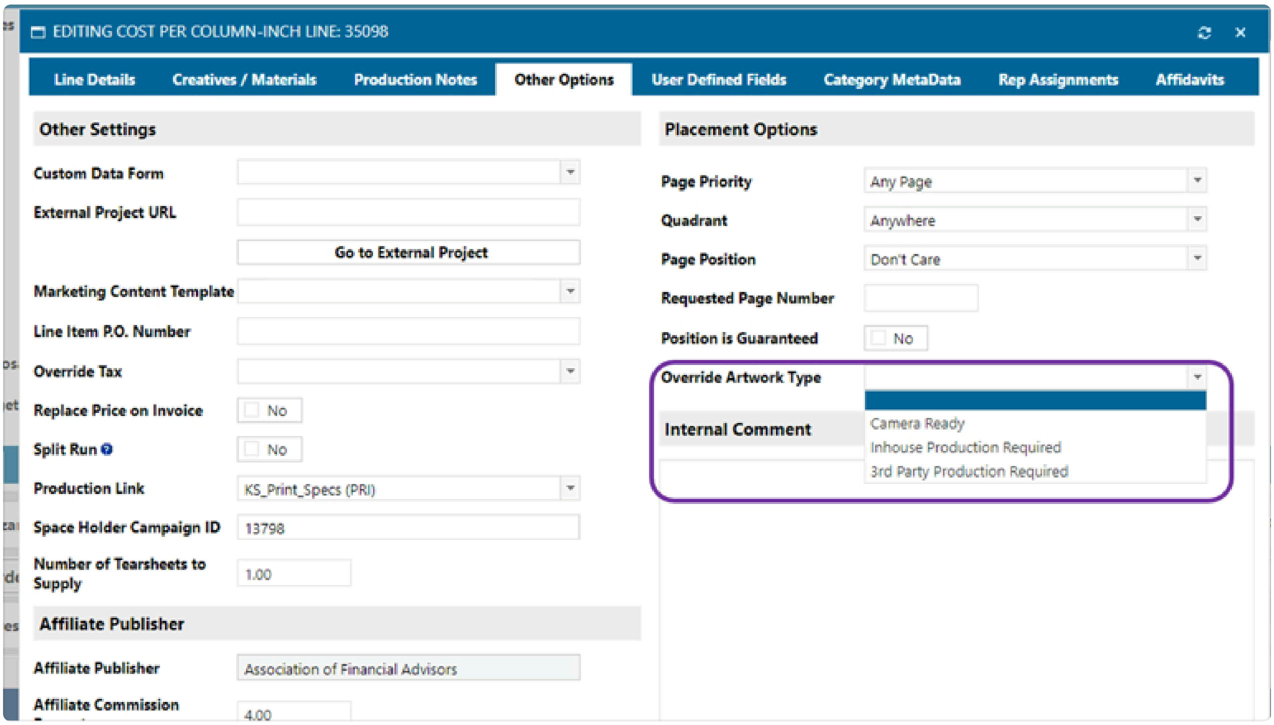
> For those of you who use the Naviga Ad InDesign Extension, please reach out to support for a new Extension version for 2023.5 release. The old version will still be functional, but you will not see the deadline time in InDesign unless you install the new extension version.

Setting Material Type in Order Entry

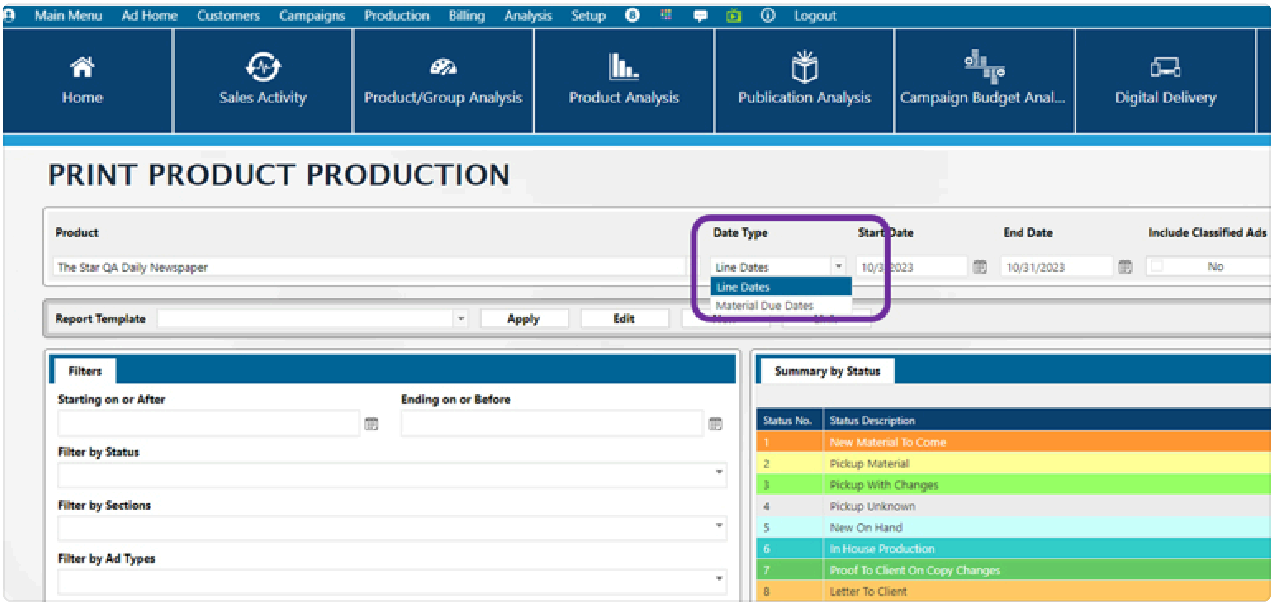
When creating a campaign, there is a new field on the campaign header for "Default Artwork Type"



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"

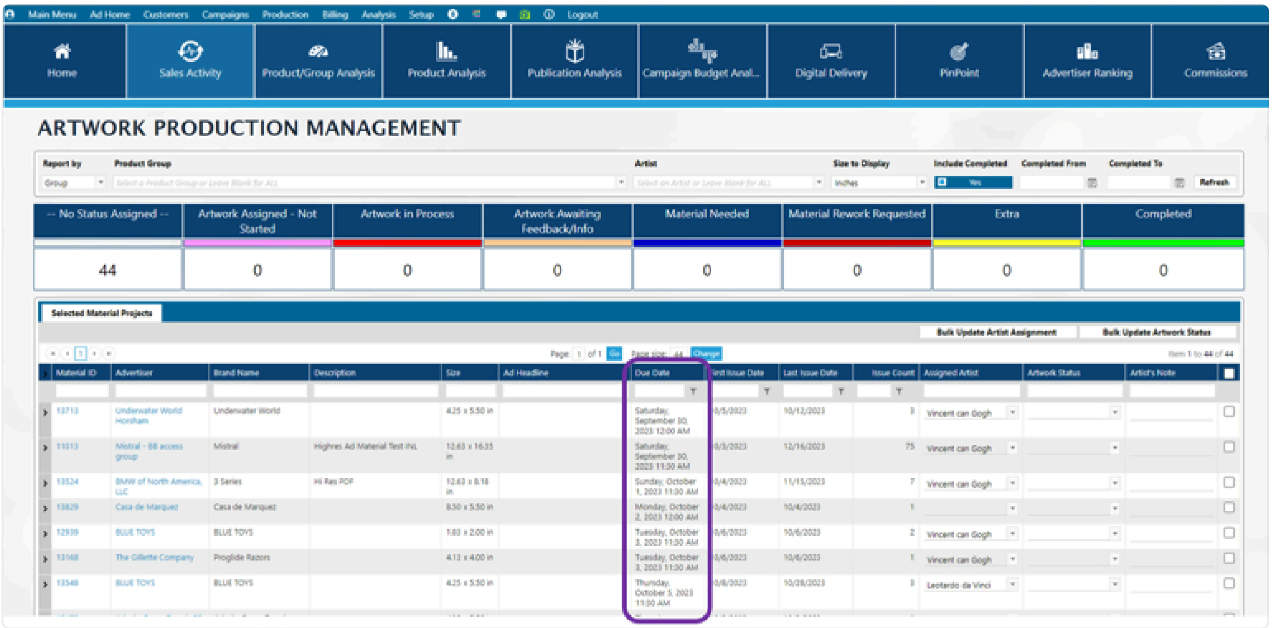


Along with the above changes to deadlines, there is a new field on some Production Reports. The **Production by Product Group, Production by Sales Rep and Production by Print Product** now have new search based on Date Type. Options in this field are Line Date or Material Due Date.



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:



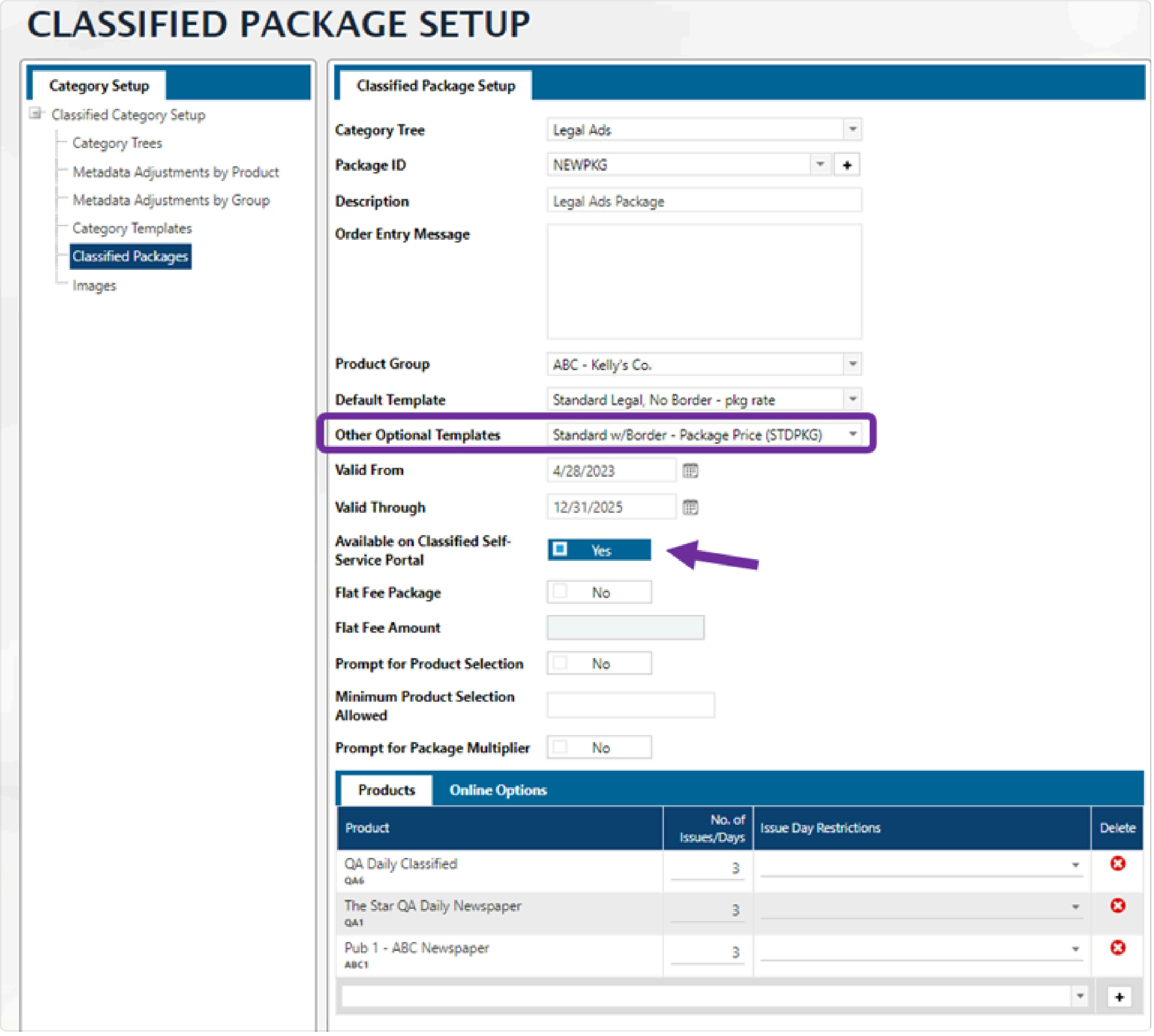
Dynamic Pricing in Classified Portal

Dynamic Pricing in Classified Portal

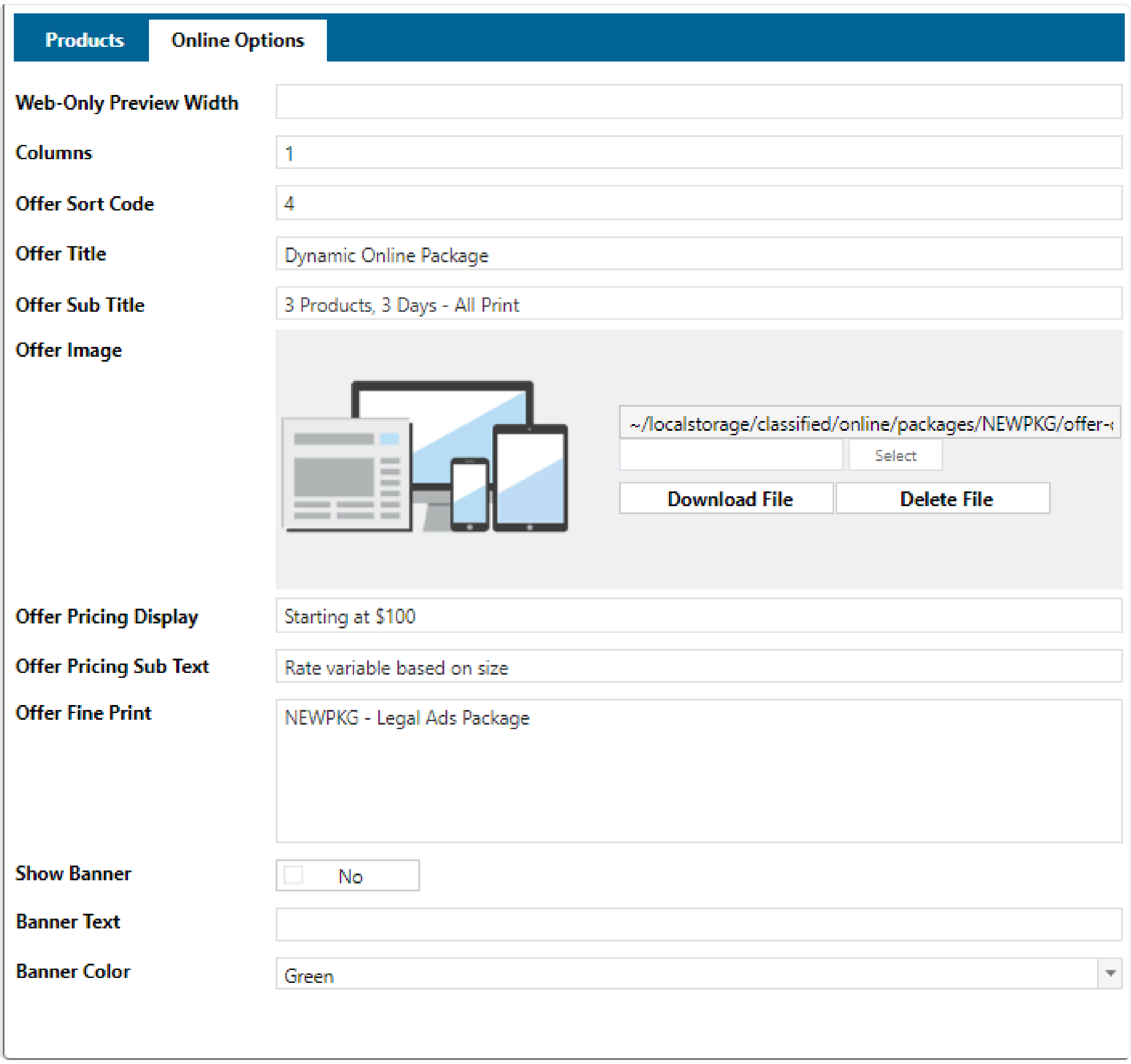
The classified self-service portal has expanded functionality to be able to price orders dynamically. Previously only flat-fee packages were supported. Now you can offer both flat fee and package pricing based on the template chosen and the content provided.

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

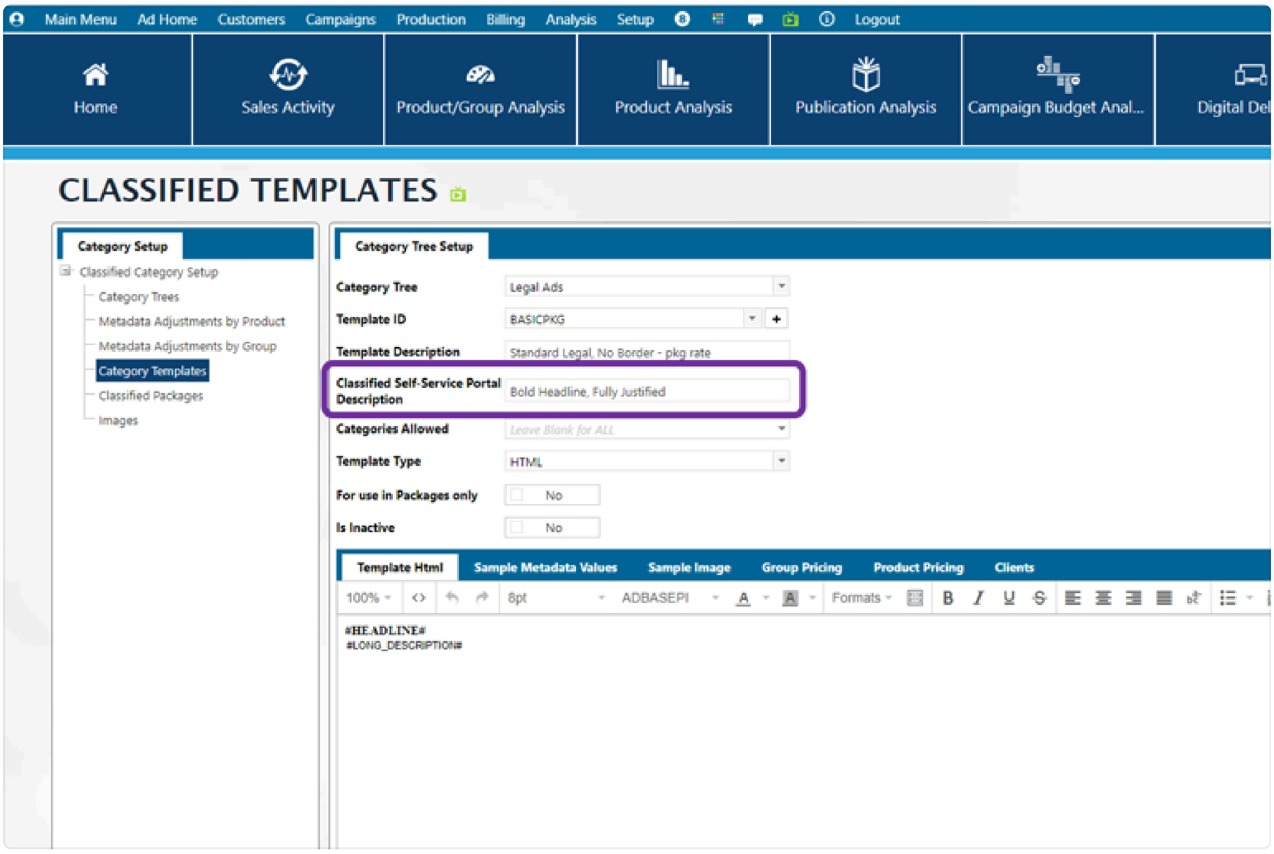
1. The Flag to make the package available online has been moved to the main screen to be more prominent. Previously it was on the Online Options tab at the bottom
2. The "Other Optional Templates" field is also now available on the portal. Previously it was only for internal use. Now you can use this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



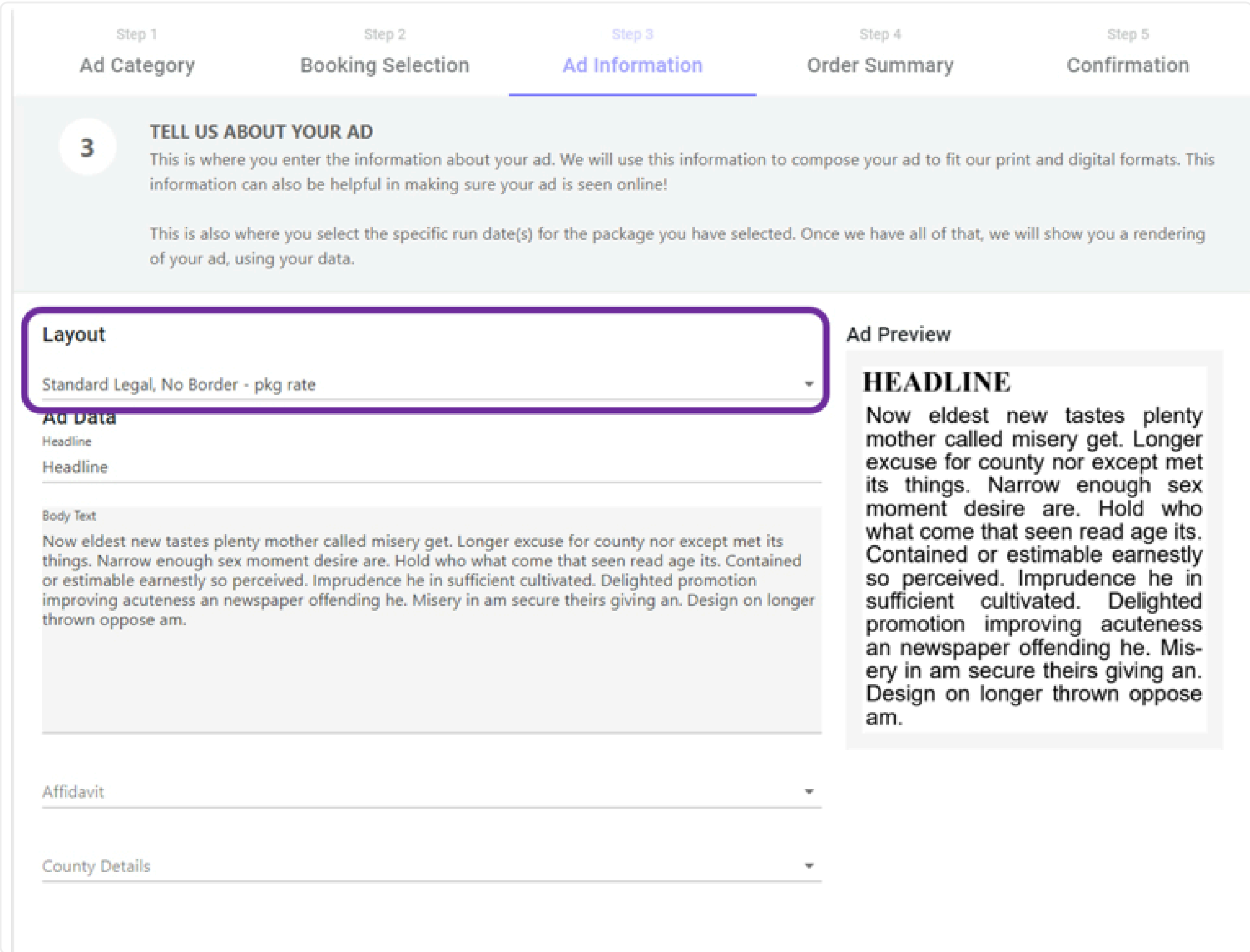
The online options tab remains the same as in previous releases, except for the removal of the "Available on Classified Self-service Portal" flag.



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.



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.

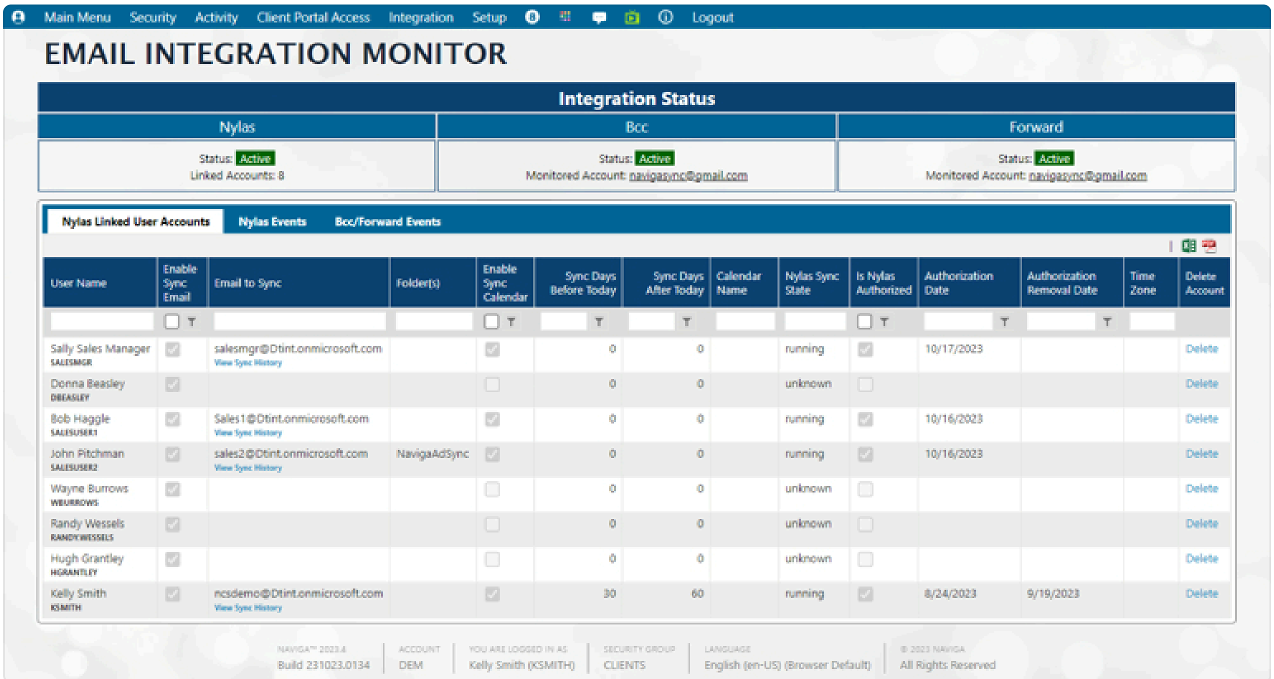
Email Integration Monitor

Email Integration Monitor

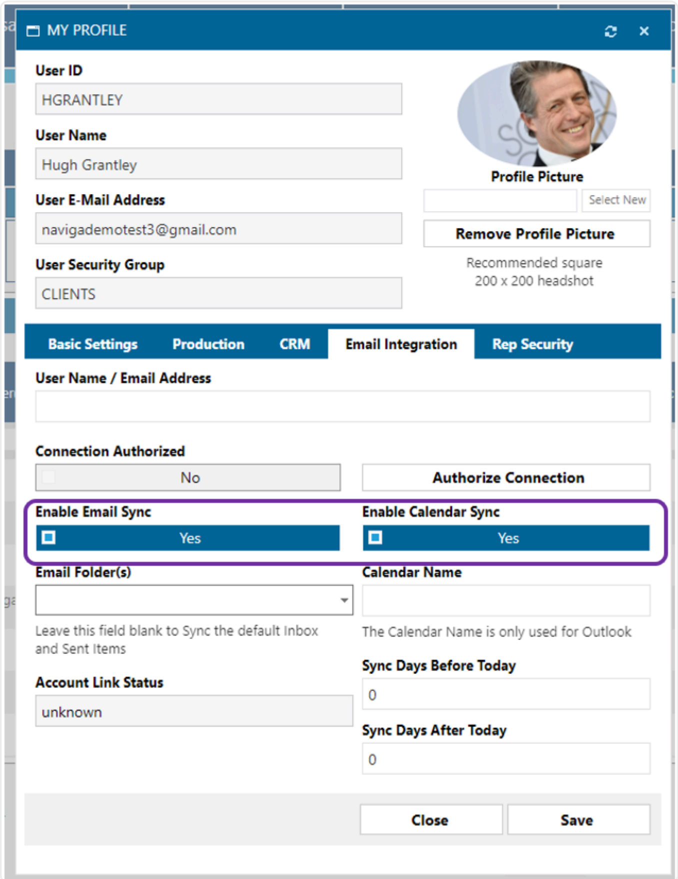
Nylas Integration

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**



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



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)

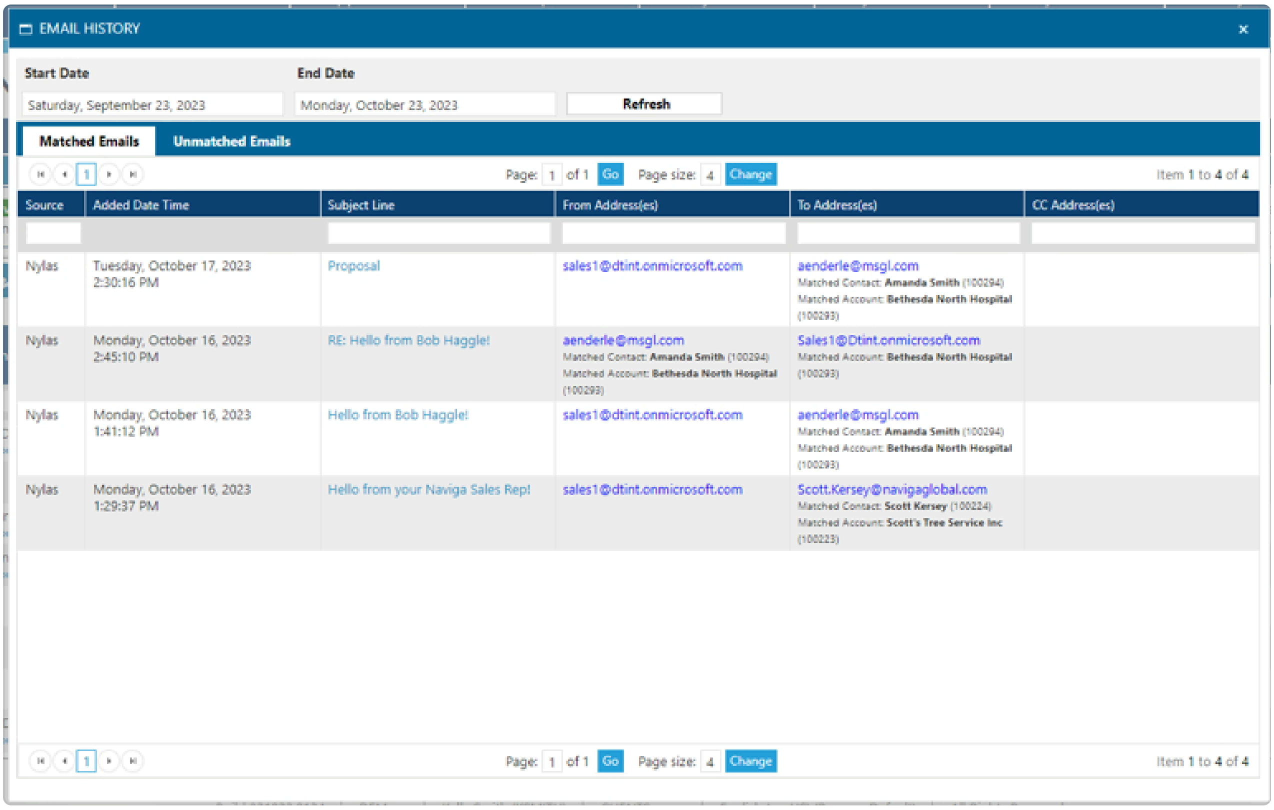
Sync state	Simplified	Detailed	Description
valid	x		All emails for folders, contacts, and calendars are syncing reliably.
invalid	x		The account has an authorization issue and needs to be re-authenticated.

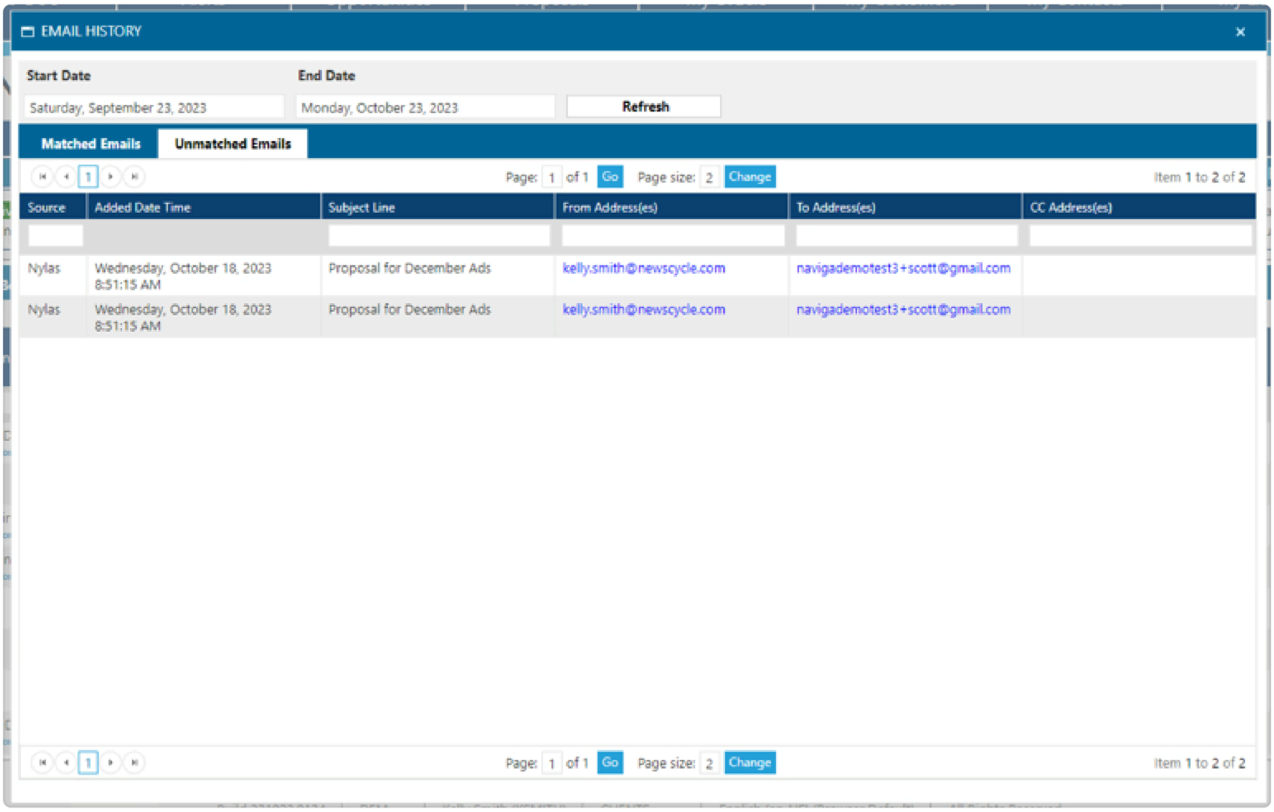
Sync state	Simplified	Detailed	Description
downloading	x		All folders are connected and the account is in the process of syncing all historical messages on the account. Depending on the size of the account and the speed of the connection between Nylas and the email server, this can take up to 24 hours 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.





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

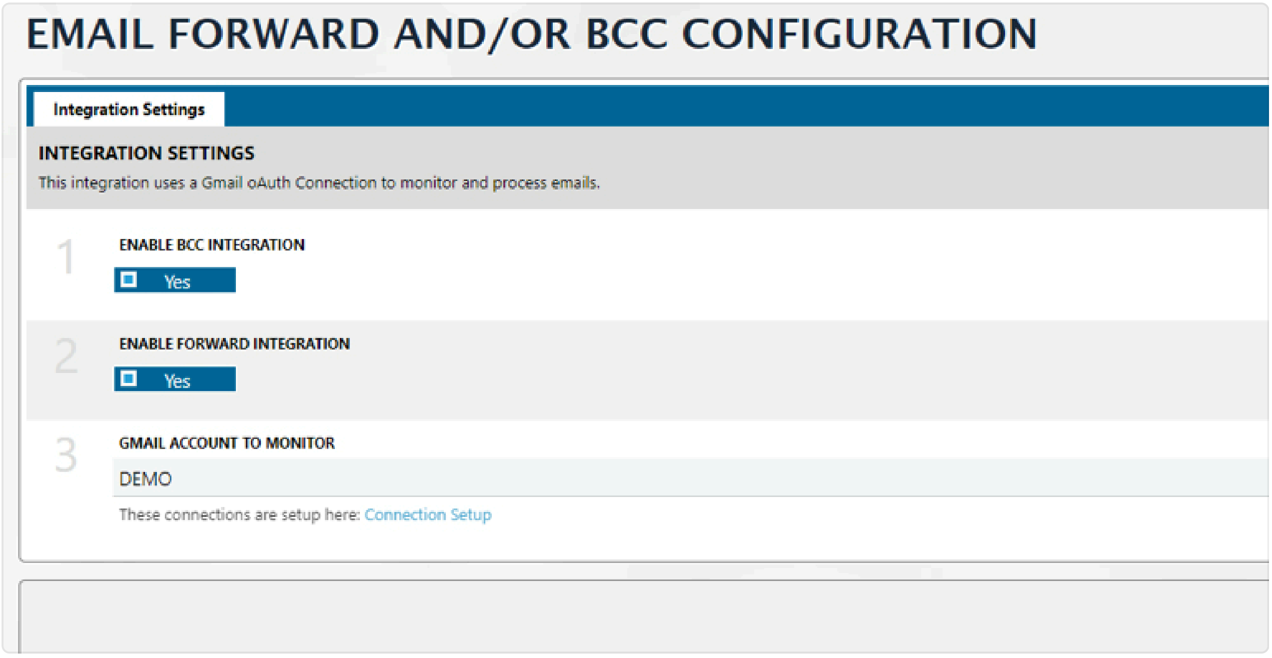
In some cases, a media company may prefer to allow users to pick and choose which emails to sync by forwarding or bcc-ing emails to a monitored email address rather than using the Nylas integration, which will automatically scan the users inbox and sent mail (or other designated folder).

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.

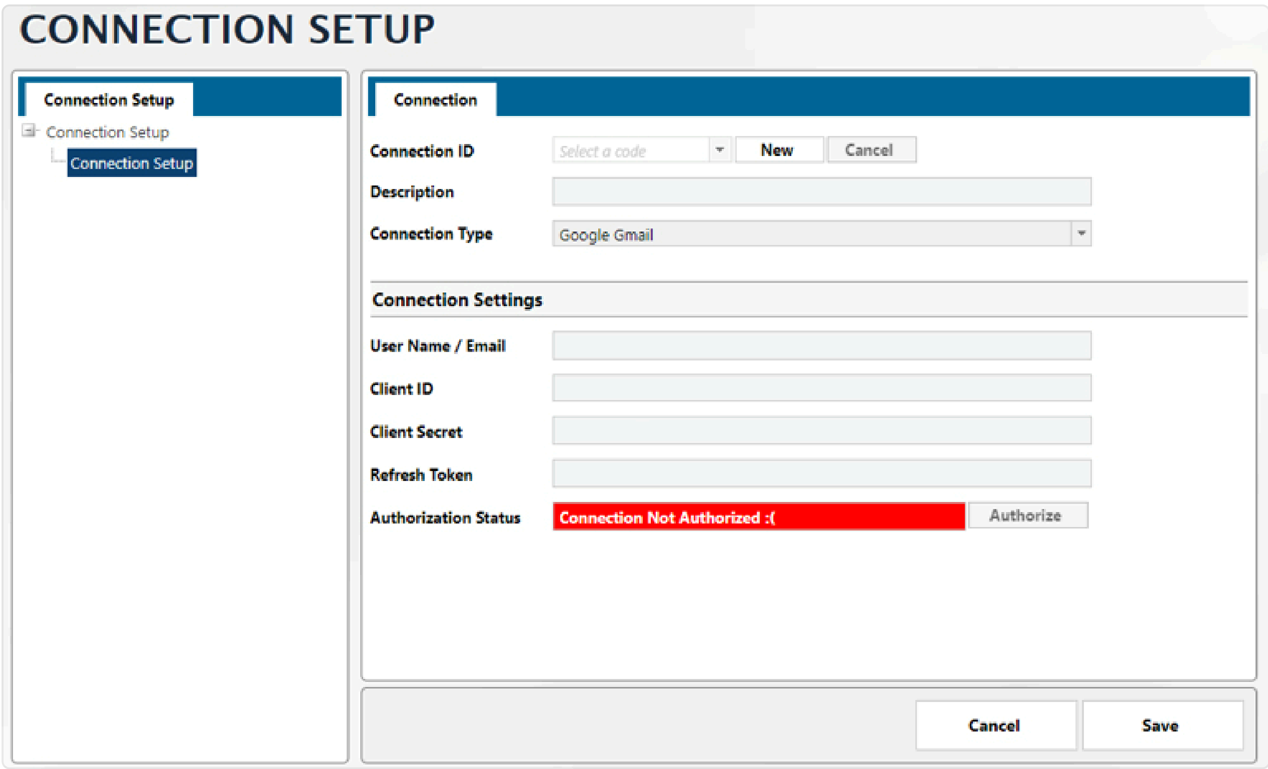
Navigate to **System Settings Module → Integration → Email Forward and/or BCC Configuration**

> 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:



Click on the Connection Setup link from screenshot above.

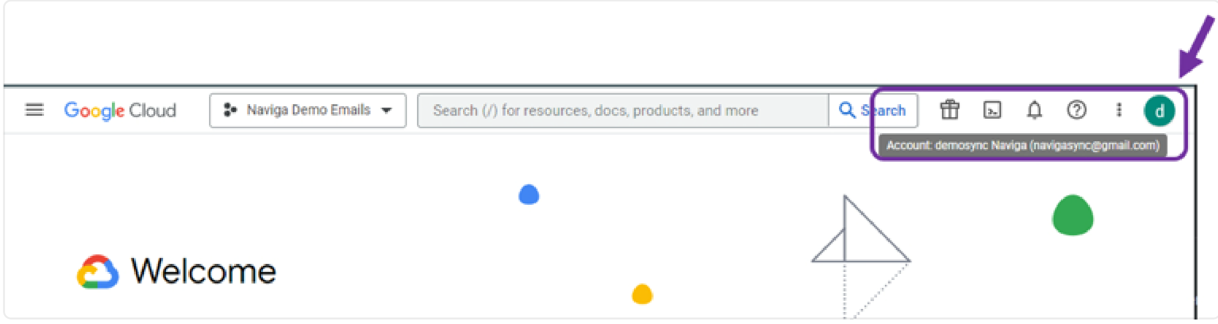


Click New and give the connection an ID and a Description. The Connection Settings section will be filled in after following the steps below to create a gmail account and to get the Client ID and Client Secret from the Google Development Console.

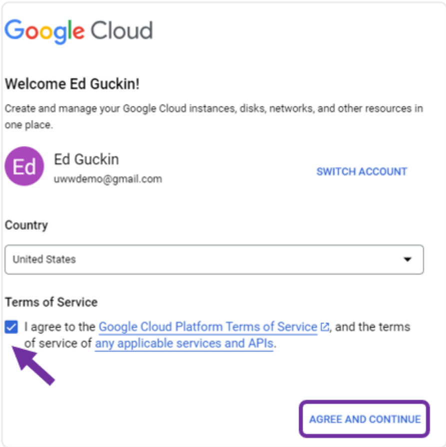
To set up the email BCC/FWD integration, an admin must first setup the account which will be used for forwarding. We have standardized this using a google email address. If you are using G-Suite as your email system, you can use something like navigasync@yourdomain.com, or you can just create a free 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:

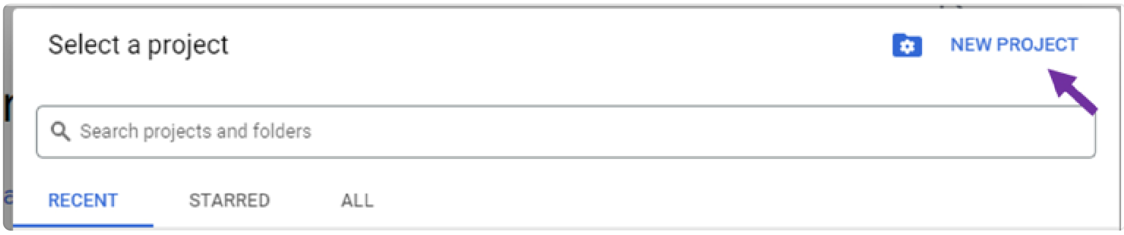
1. Create Gmail Account (If needed)
2. Navigate to Google Cloud: https://console.cloud.google.com/
3. Make sure upper right hand corner of webpage has email account selected – if not select and log into that email account:



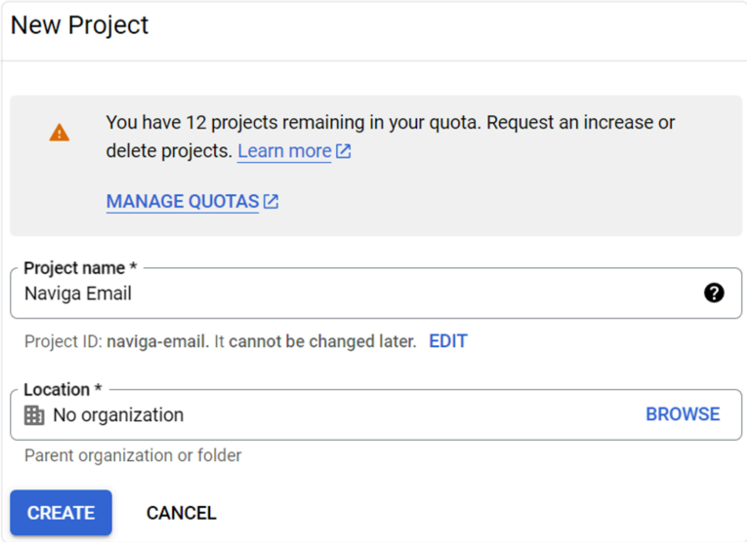
4. If this is the first time using Google Cloud, you may have to agree to terms of service:



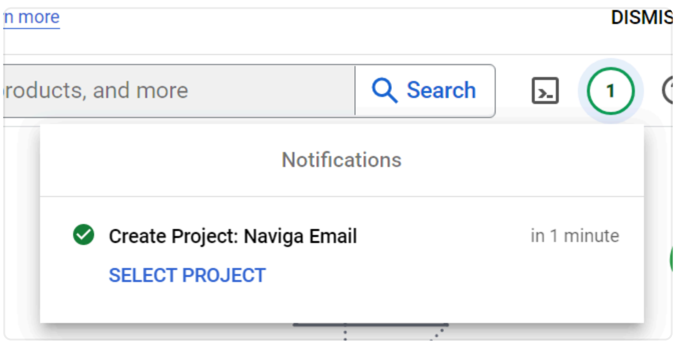
5. Select a project and choose New Project:



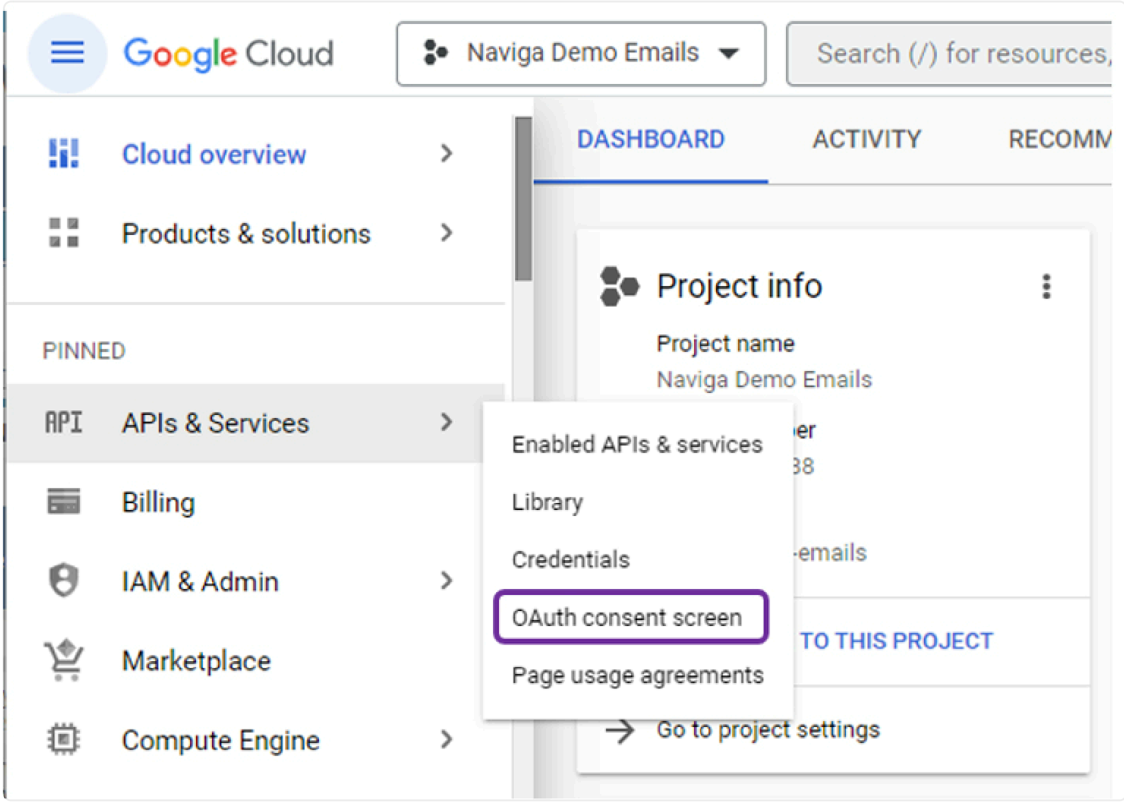
6. Give it any name and choose Create:



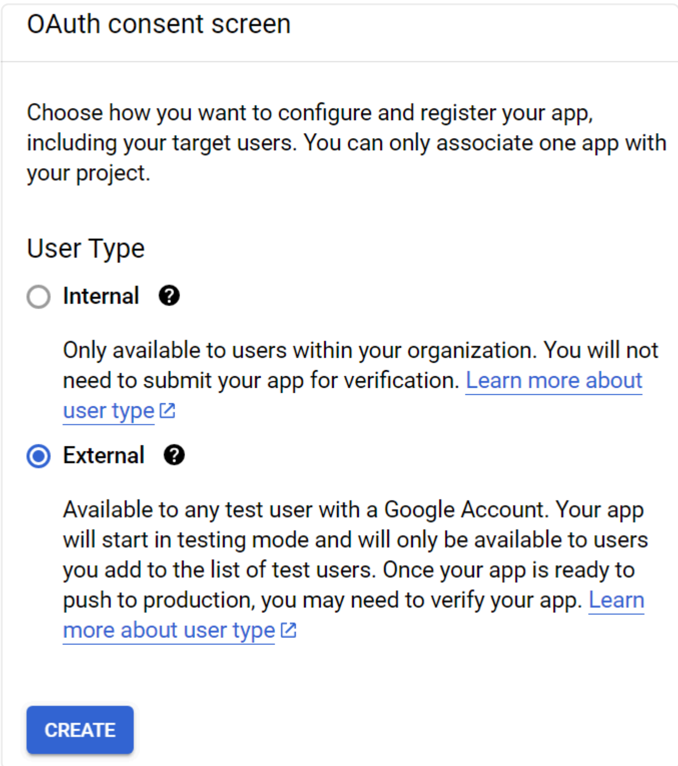
7. Once the creation is done, choose Select Project:



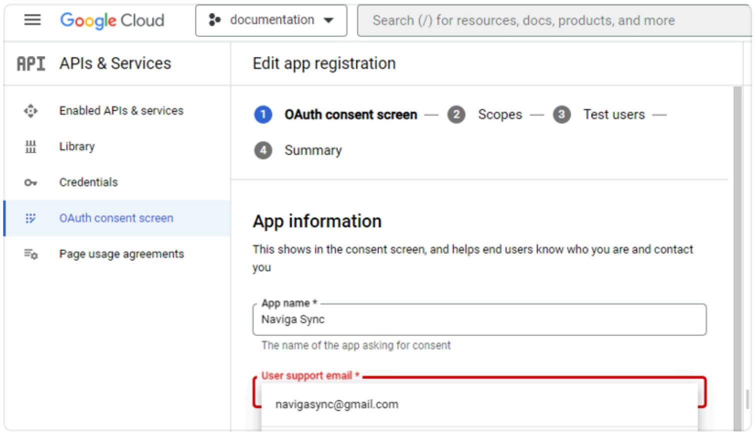
8. Under APIs and Services, choose OAuth consent screen:



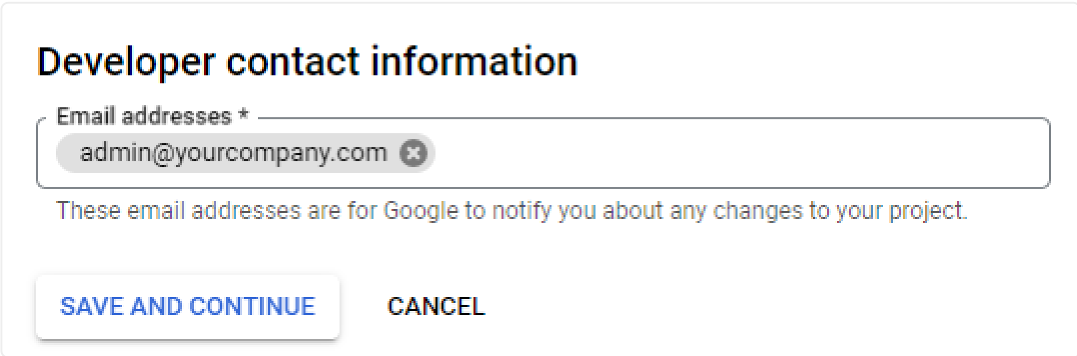
9. Choose External and then Create:



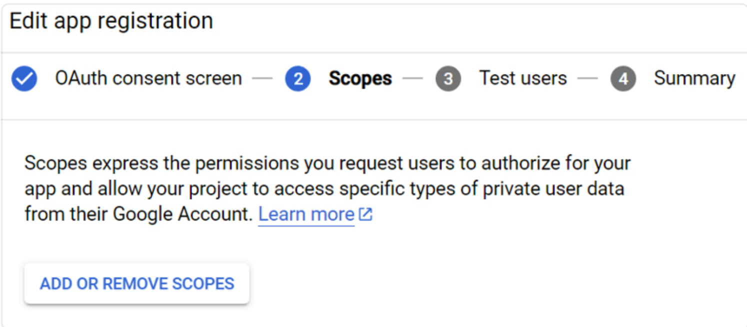
10. Give the application a name (any name) and select your email address from the list:



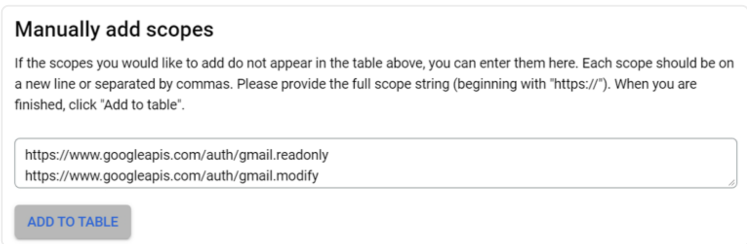
11. Skip the app logo and App domain sections and then use any email address for Developer Contact and click Save and Continue:



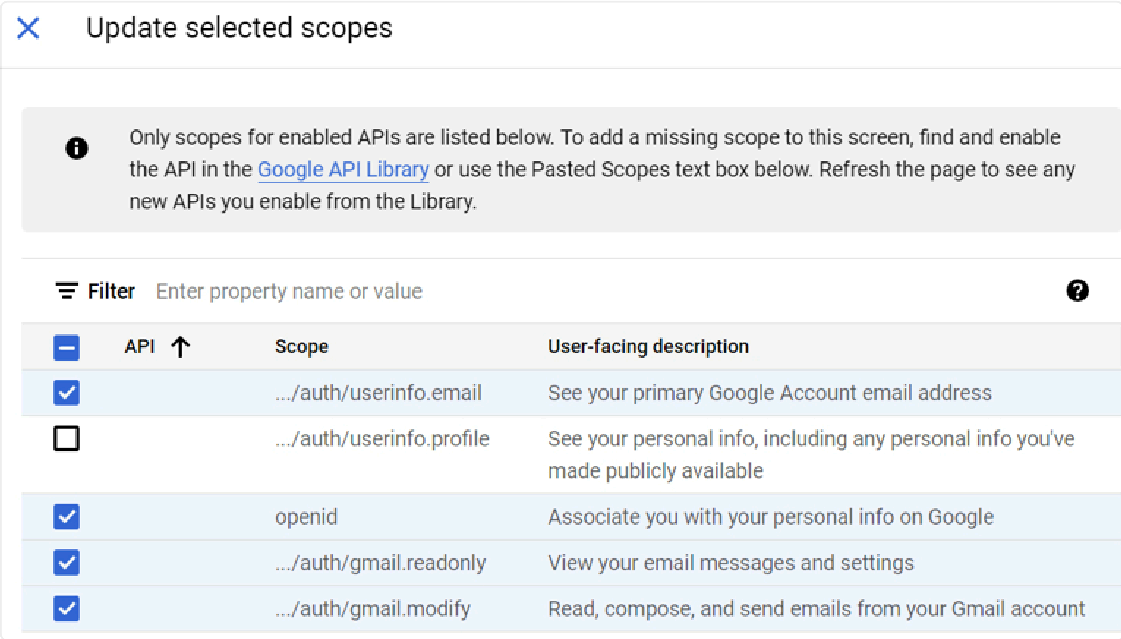
12. Click Add or Remove Scopes:



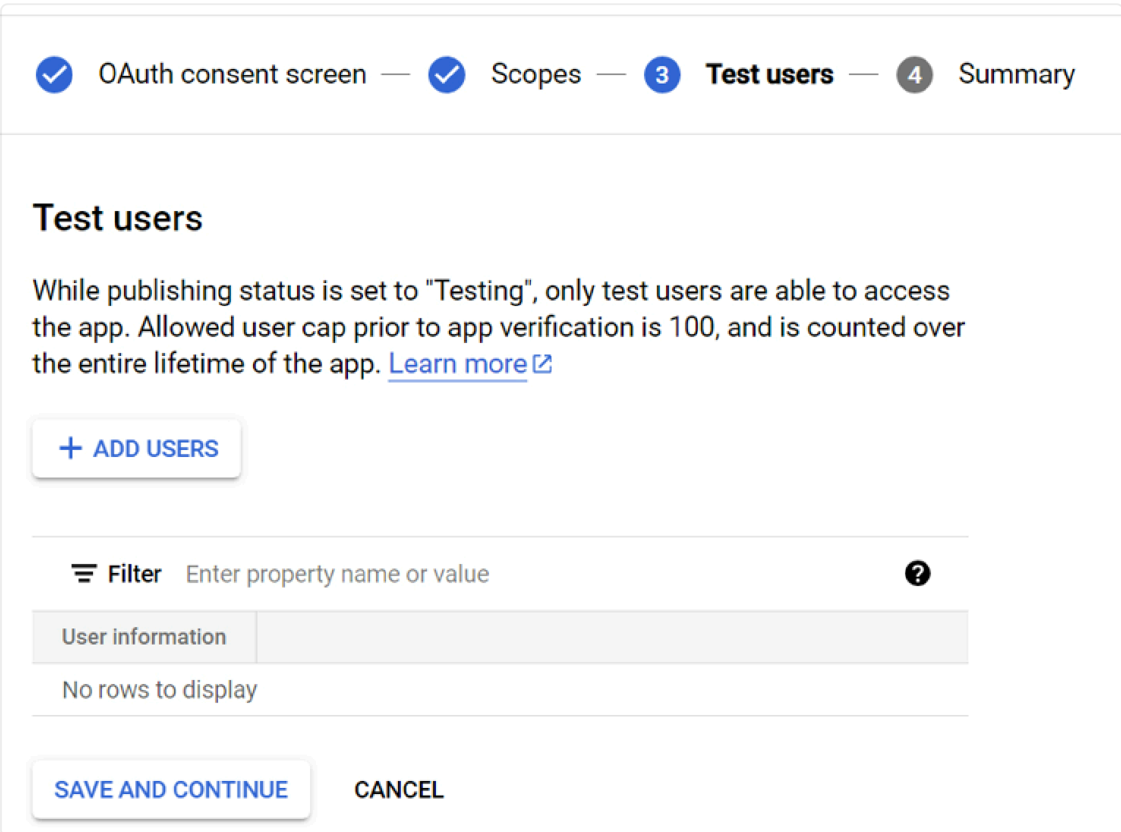
13. Under the manually add scopes add these and click Add to Table: https://www.googleapis.com/auth/gmail.readonlyhttps://www.googleapis.com/auth/gmail.modify



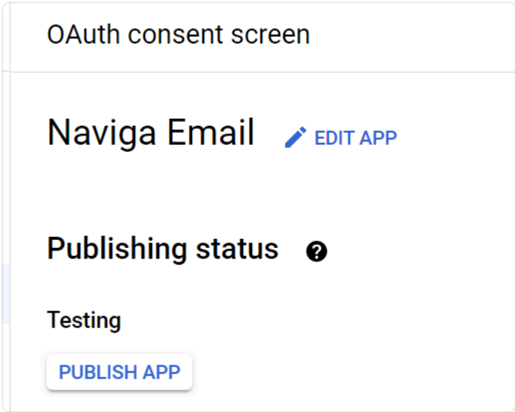
14. Select ../auth/userinfo.email and openid from the top section (in addition to the two you added):



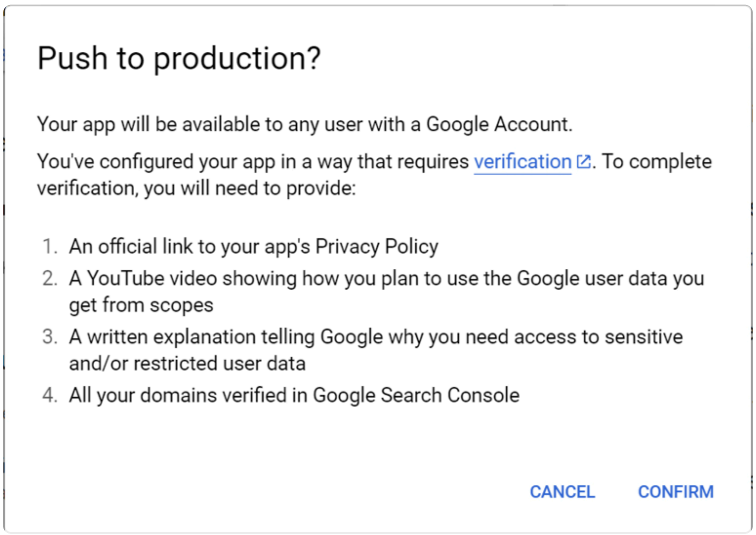
15. Click update at the bottom of the window and then Save and Continue. On the Test users screen you can leave it empty and choose Save and Continue:



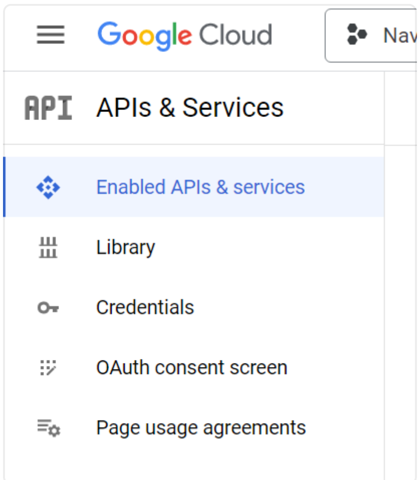
16. Choose Back to Dashboard and then Publish App:



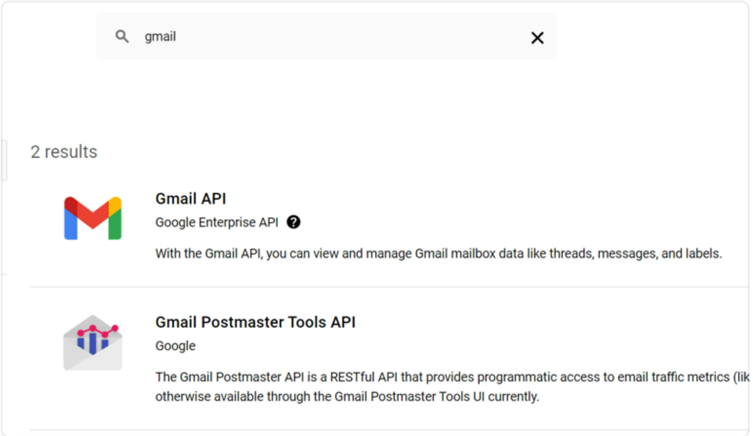
17. Once the pop-up is displayed to push to production, click Confirm:



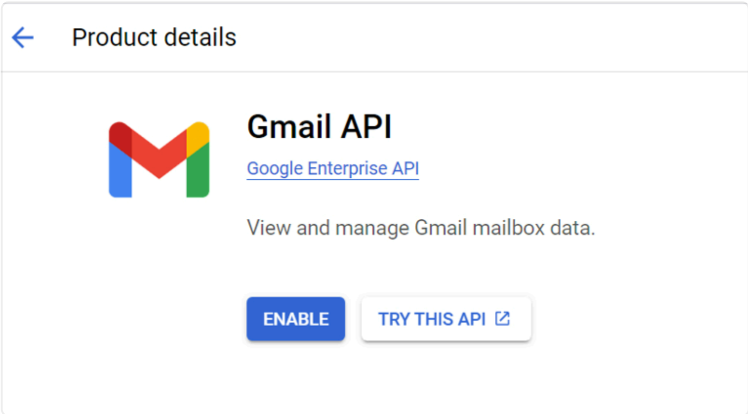
18. Next click Library to go to the list of available APIs:



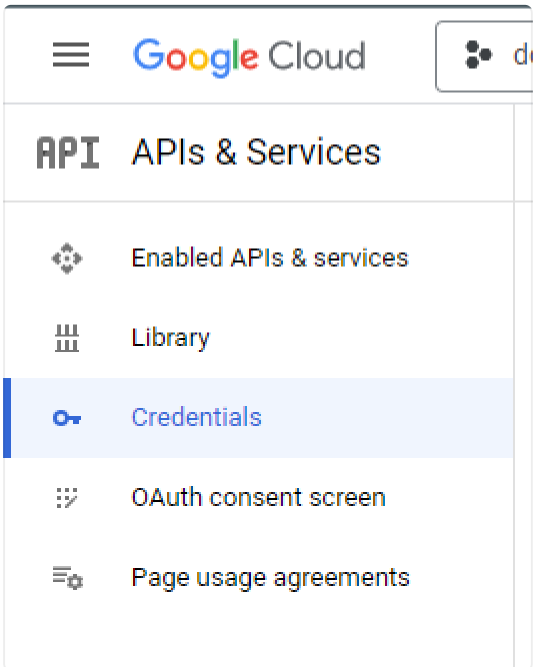
19. Type in gmail and hit enter to search for the gmail api:

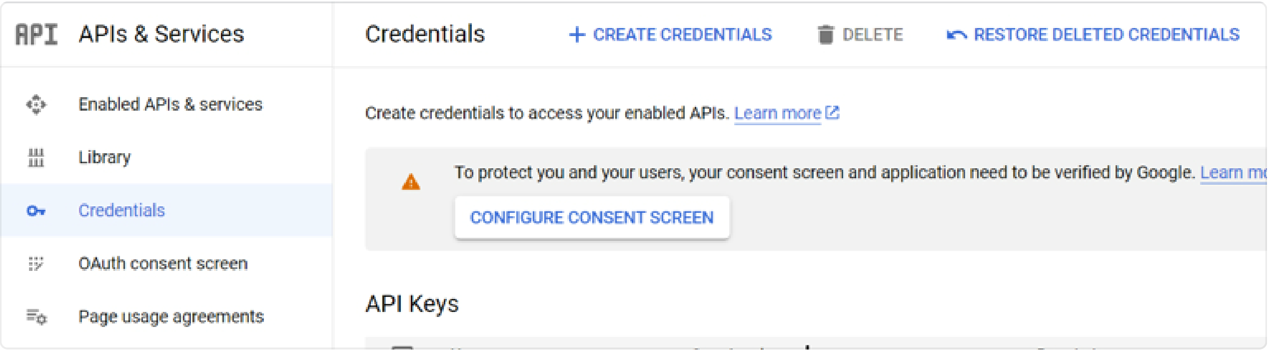


20. Choose Gmail API and then click enable:

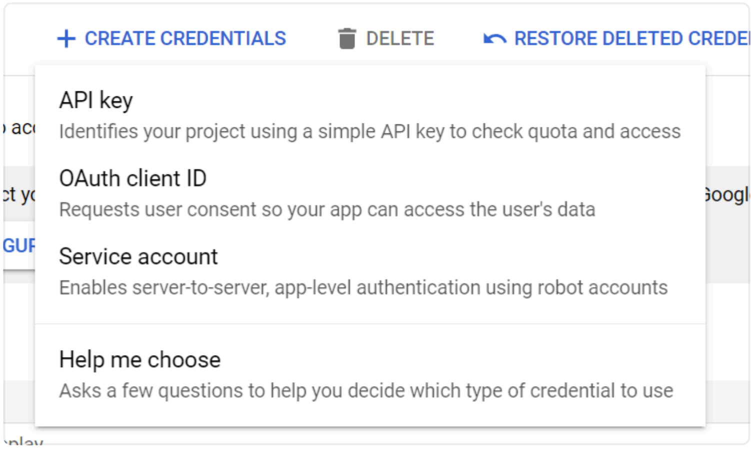


21. Next choose Credentials from the left menu and then Create Credentials at the top:

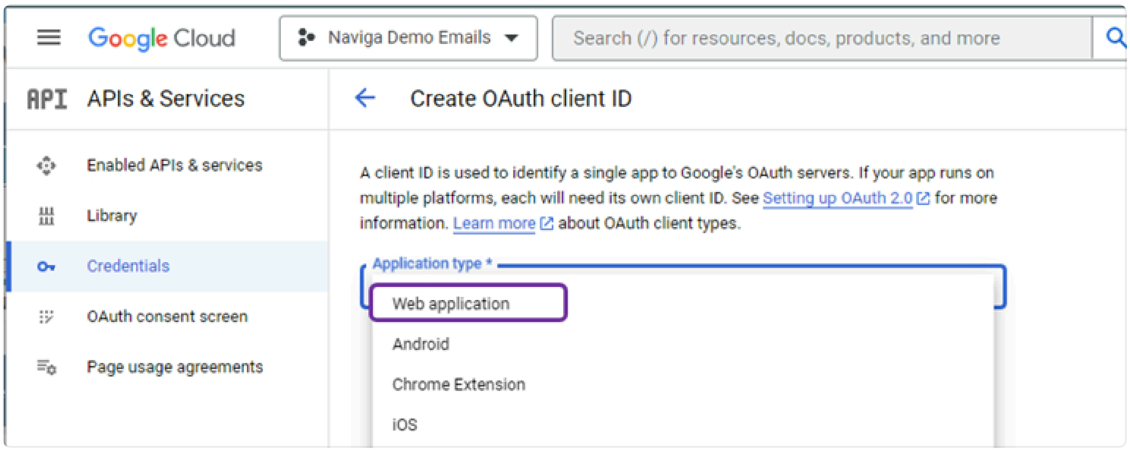




22. Choose OAuth client ID:



23. Chose Web application for the Application type.

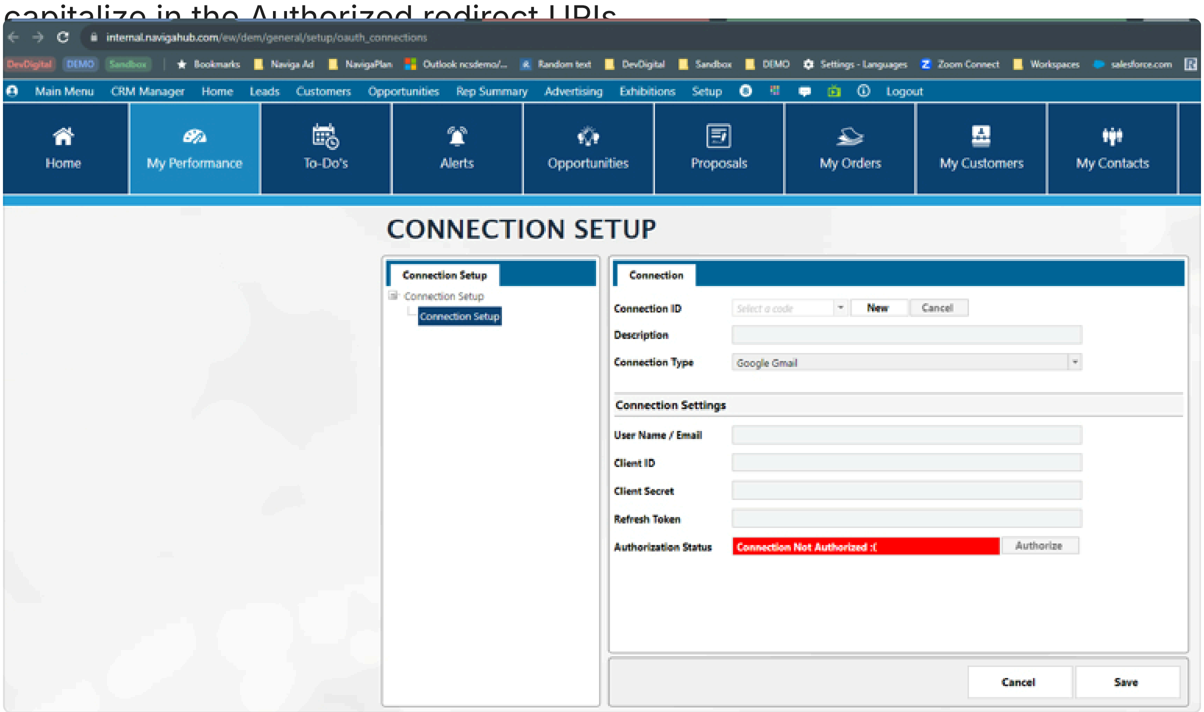


24. Chose any name for the Name field.

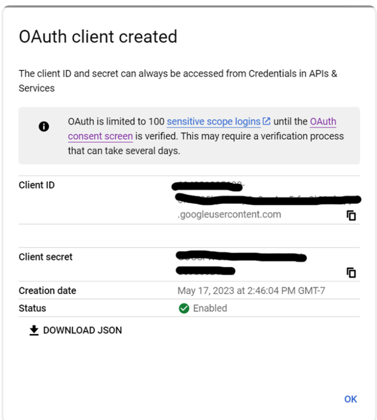
For Authorized JavaScript origins use the first part of the url of the Naviga System. If there are test or dev systems with a different prefix, include them here as well. For example, our dev system the base url is this: https://dev.navigahub.com yours will be your 3-digit site code where we have "dev"

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

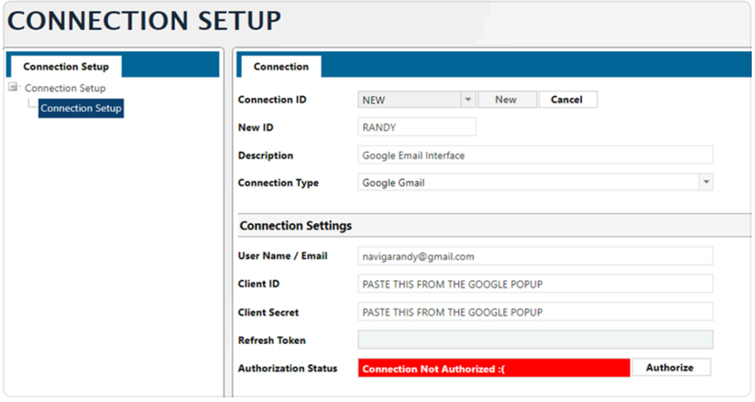
NOTE – the url above is case sensitive so be sure it matches what you have in your browser URL. If EW or your 3-digit site code are capitalized, be sure to capitalize in the Authorized redirect URIs.



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

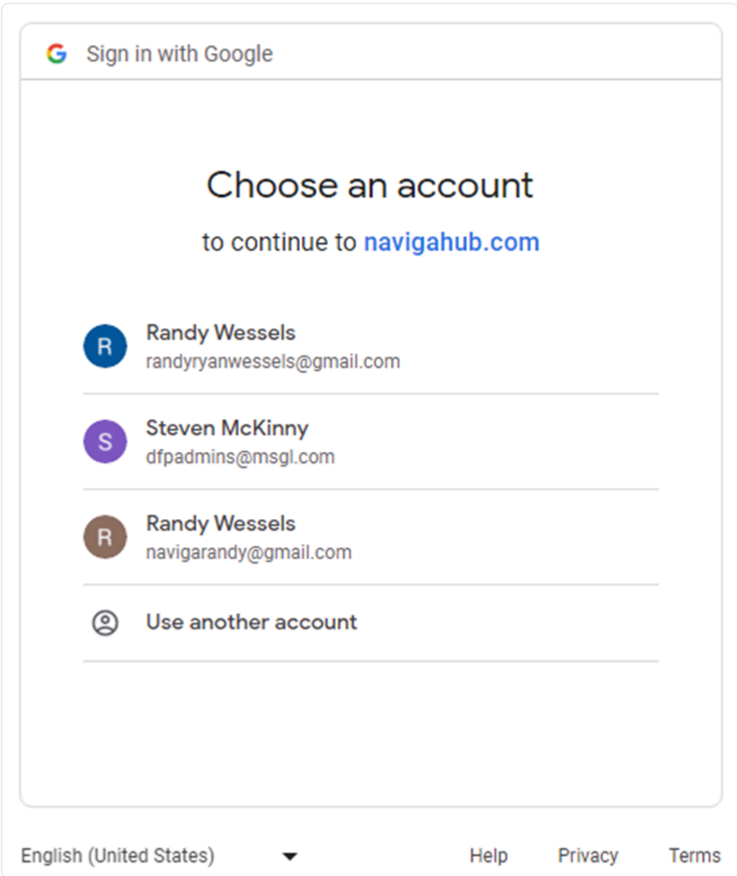


26. In the Naviga Ad system you will need to go to the URL that you specified in the prior step and create a new connection:

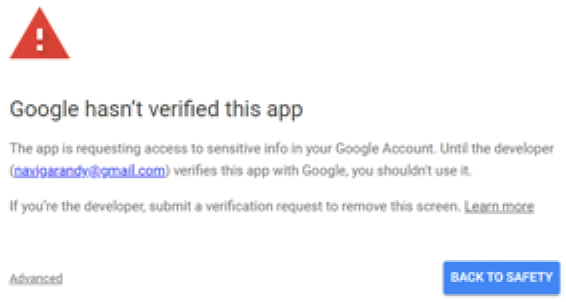


27. Click save so the connection is saved just in case there is a problem with the authorization. When you are doing the authorize it needs to redirect to Google and then comes back to the Naviga Ad system.

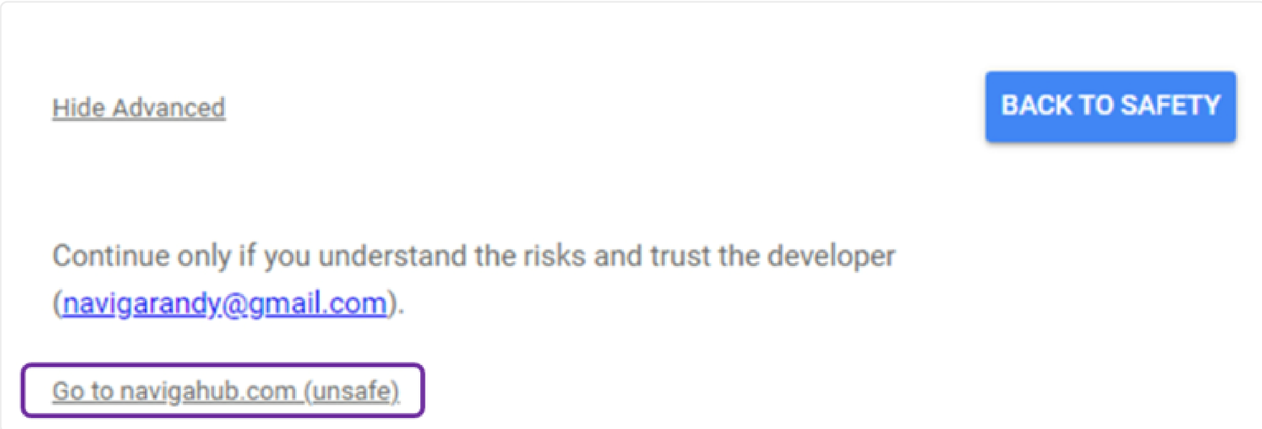
    Click Authorize and then choose the email address (you may have multiple displayed if you have multiple gmail accounts):



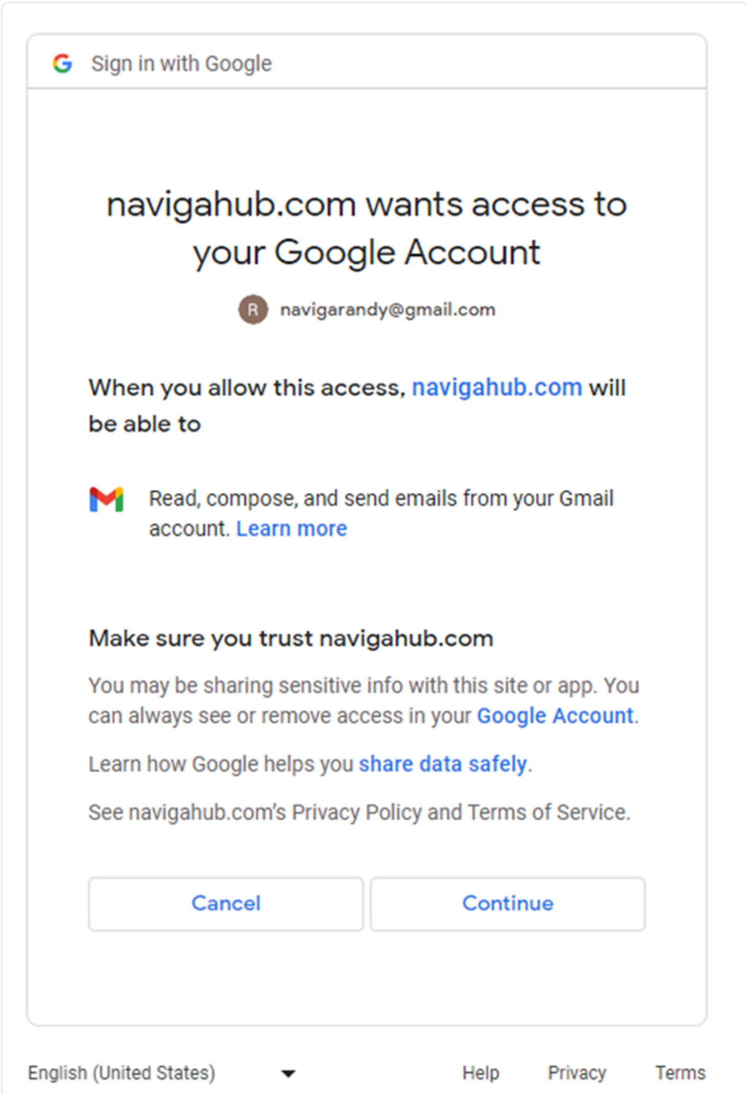
28. You may recall when setting up the OAuth Consent screen Google gave you a message about the App needing to be verified. Because the application has not been verified you will get a screen that looks like this:



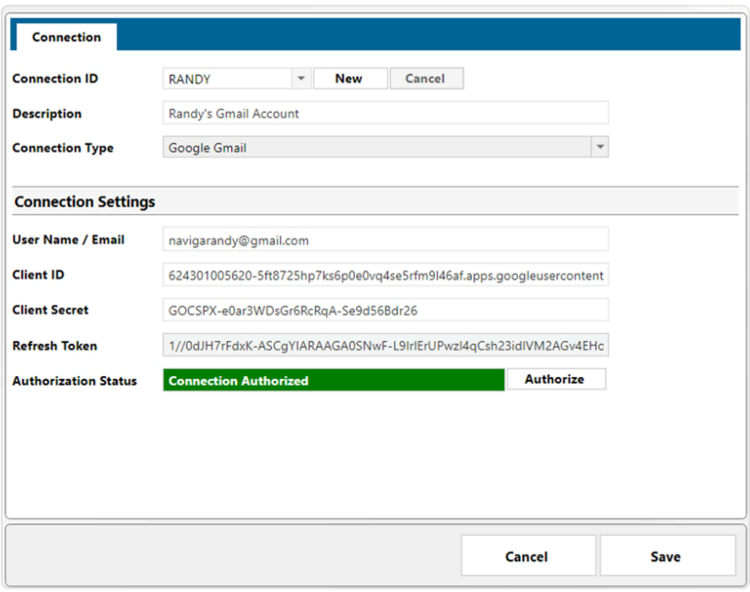
Choose Advanced and then Go to navigahub.com (unsafe). This doesn’t make you any less safe, it is just google trying to protect your account. In this case you were the one that created the Google Cloud Account.



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:

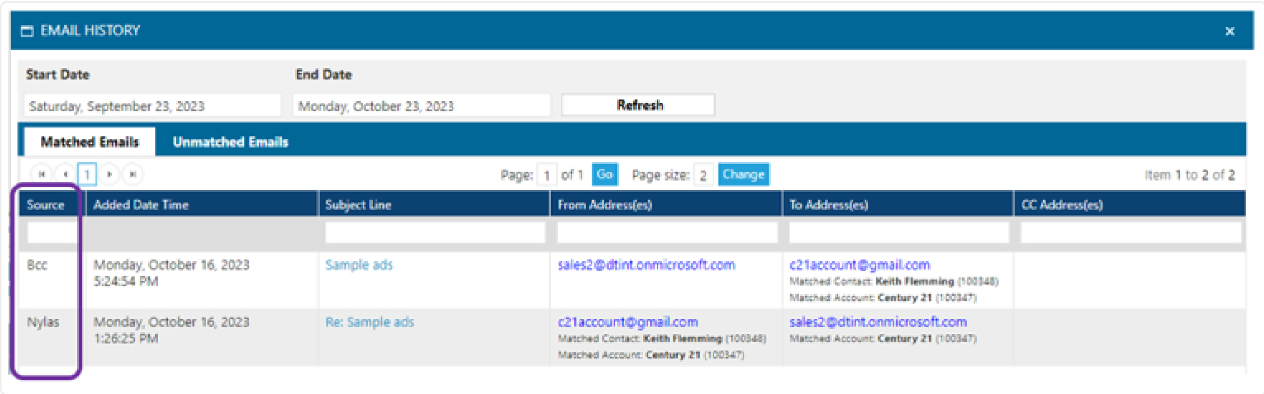


30. Assuming everything went ok, you should be back on the Naviga Ad screen with a green banner saying the connection was authorized. Just click save to make sure that everything was saved:



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:



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.

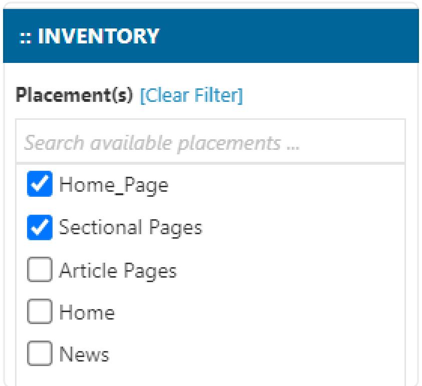
Multi-valued fields are simply separated with a comma

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

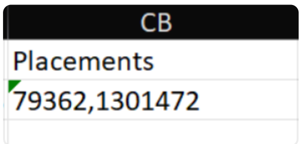
If anything within a pipe has multi-values, those are semi-colon delimited.

Here are some examples:

Multiple placements are selected on a rate:

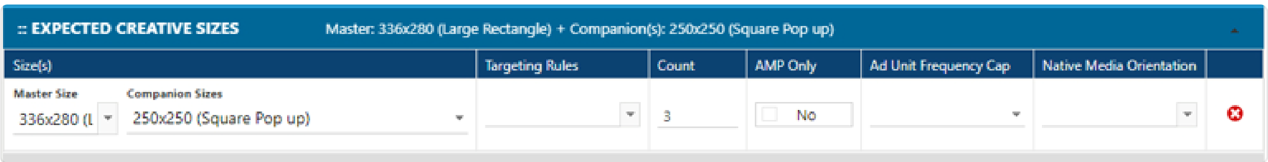


The above in excel would be represented as follows - these are the ID's of these placements as found in Ad Server Integration Setup

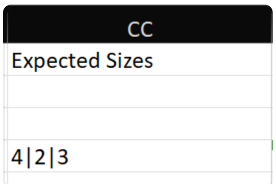


Slightly more complex, these creative sizes have multiple parts to it. The master size, the companion size and the count. (Please note that Targeting Rules on creatives, AMP Flag, Frequency Caps, and Native Media Orientation on expected creative sizes are not supported in the Import/Export.)

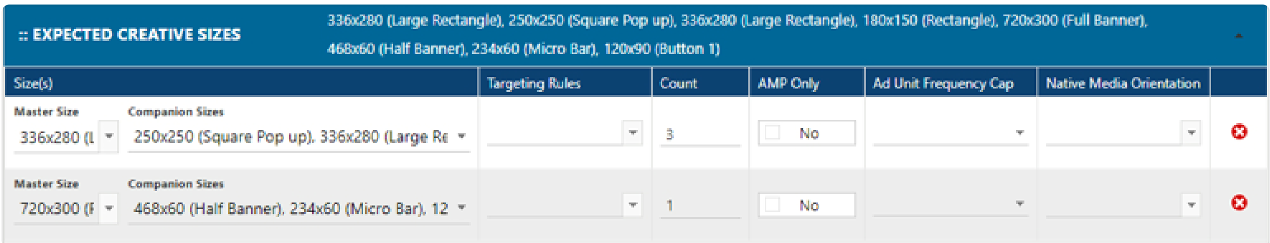
Items with multiple parts are pipe separated:



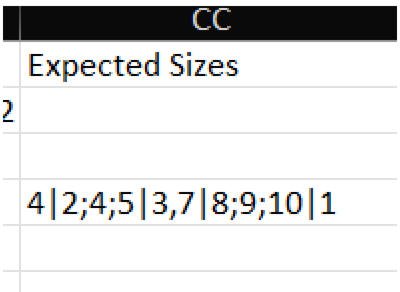
ID's are also used here, so this is what the above would look like in excel:



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



The above would be represented by the below in Excel:



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_POSSIBLE, 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/Companion 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*21732251258, 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	21740211698,233044272,21740211440	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,1025197|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|447697811592;447697811832;447697812072;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|Saturday|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

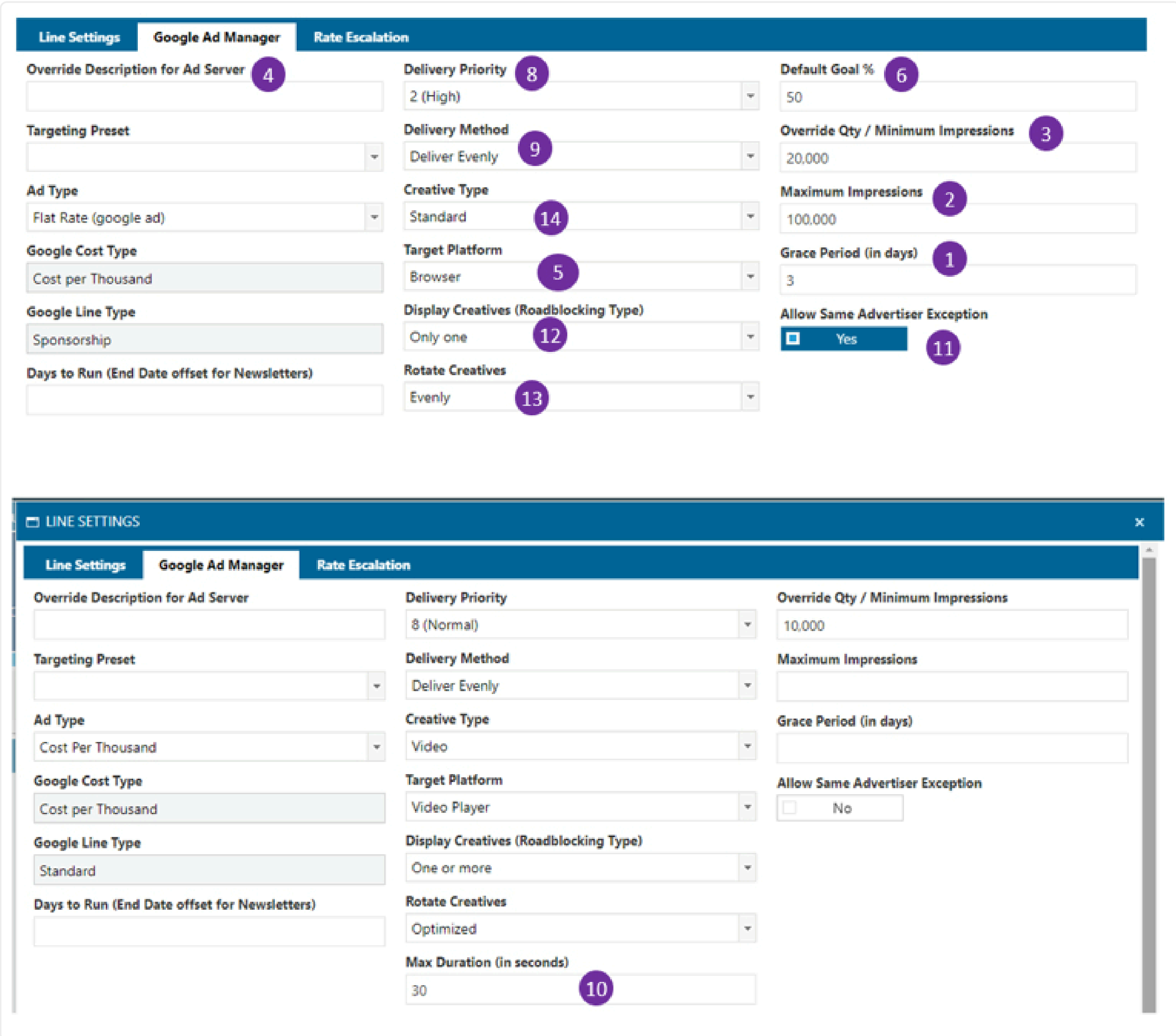
Additional columns added	Example	Data Source	Mandatory/ Optional
		etc.) are in the first position, then the "per" number in the second position and the quantity in the third. See field 24 in Diagrams below. Valid Cap Types are as follows: MINUTE HOUR DAY WEEK MONTH LIFETIME POD STREAM UNKNOWN	
Browsers 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

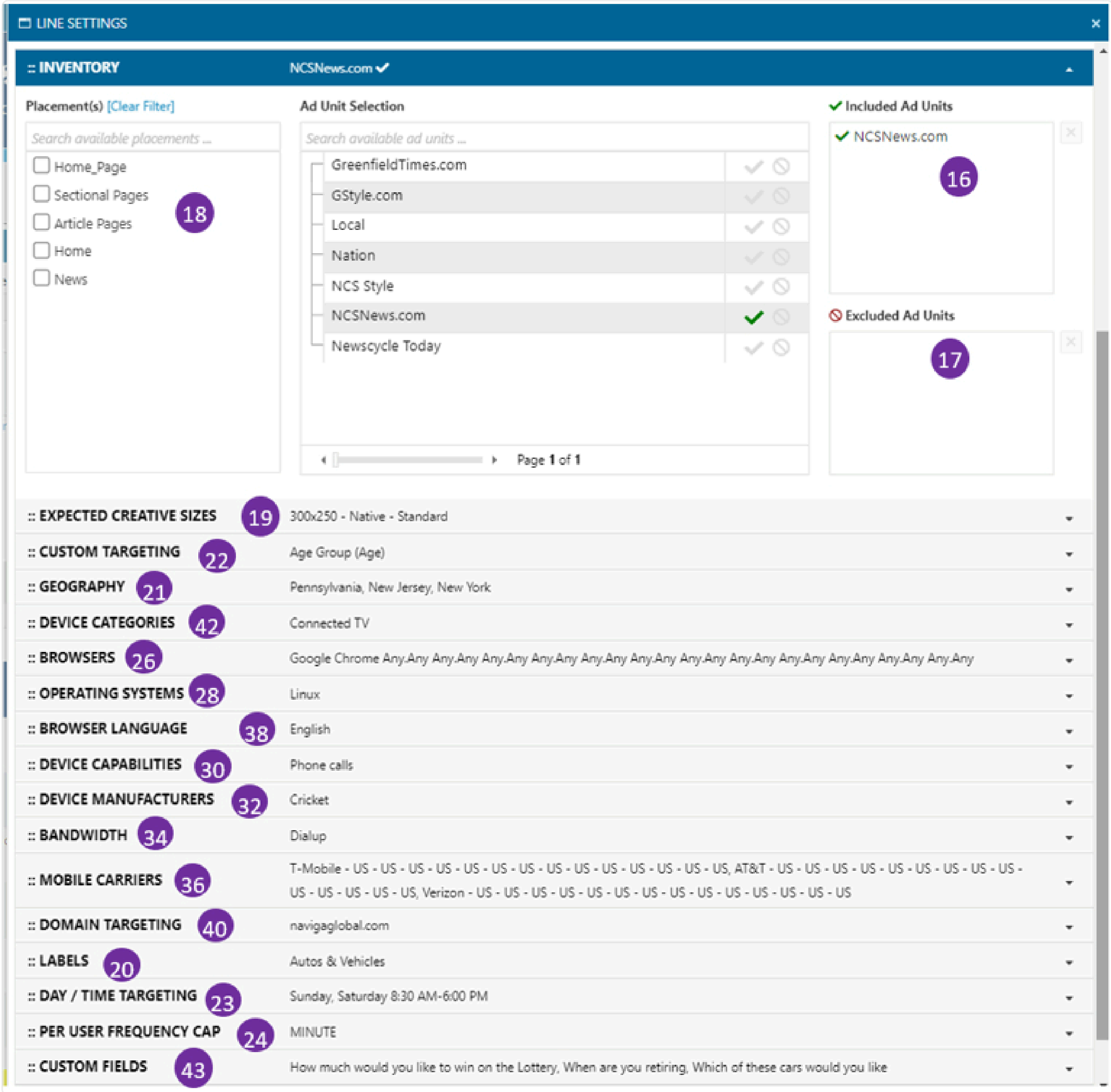
Additional columns added	Example	Data Source	Mandatory/ Optional
		systems. Multiples are comma separated. See field 28 in Diagrams below	
Device Capabilities Type	I or E	This indicates if the list of "Device Capabilities" are Include or Exclude.	Optional
Device Capabilities	5000	Used in conjunction 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

<table>
<tr><th>Additional columns added</th><th>Example</th><th>Data Source</th><th>Mandatory/ Optional</th></tr>
<tr><td>Domains Type</td><td>I or E</td><td>This indicates if the list of "Domains" are Include or Exclude.</td><td>Optional</td></tr>
<tr><td>Domains</td><td>navigaglobal.com</td><td>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</td><td>Optional</td></tr>
<tr><td>Device Categories Type</td><td>I or E</td><td>This indicates if the list of "Device Categories" are Include or Exclude.</td><td>Optional</td></tr>
<tr><td>Device Categories</td><td>30000,30002</td><td>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</td><td>Optional</td></tr>
<tr><td>Custom Fields (UDF's)</td><td>INET.LINE∗TEXT∗1|,INET.LINE∗NUMERIC∗1|1000000,INET.LINE∗DATE∗1|10/31/2028,INET.LINE∗PICKLIST∗1|R;M</td><td>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.</td><td></td></tr>
</table>

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





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
2 = 2 (High)
3 = 3
4 = 4 (Normal)
5 = 5 (Low)

STANDARD
6 = 6 (High)
7 = 7
8 = 8 (Normal)
9 = 9
10 = 10 (Low)

NETWORK
11 = 11 (High)
12 = 12 (Normal)
13 = 13
14 = 14 (Low)

BULK
11 = 11 (High)
12 = 12 (Normal)
13 = 13
14 = 14 (Low)

PRICE_PRIORITY
11 = 11 (High)
12 = 12 (Normal)
13 = 13
14 = 14 (Low)

HOUSE
15 = 15 (High)
16 = 16 (Normal)

CLICK_TRACKING
1= 1 (High)
2= 2
3= 3
4= 4
5= 5
6= 6
7= 7
8= 8
9= 9
10= 10
11= 11
12= 12
13= 13
14= 14
15= 15
16= 16 (Normal)

ADSENSE
1= 1 (High)
2= 2
3= 3
4= 4
5= 5
6= 6
7= 7
8= 8
9= 9
10= 10
11= 11
12= 12 (Normal)
13= 13
14= 14
15= 15
16= 16 (Low)

AD_EXCHANGE
1= 1 (High)
2= 2
3= 3
4= 4
5= 5
6= 6
7= 7
8= 8
9= 9
10= 10
11= 11
12= 12 (Normal)
13= 13
14= 14
15= 15
16= 16 (Low)

BUMPER
15 = 15 (High)
16 = 16 (Normal)

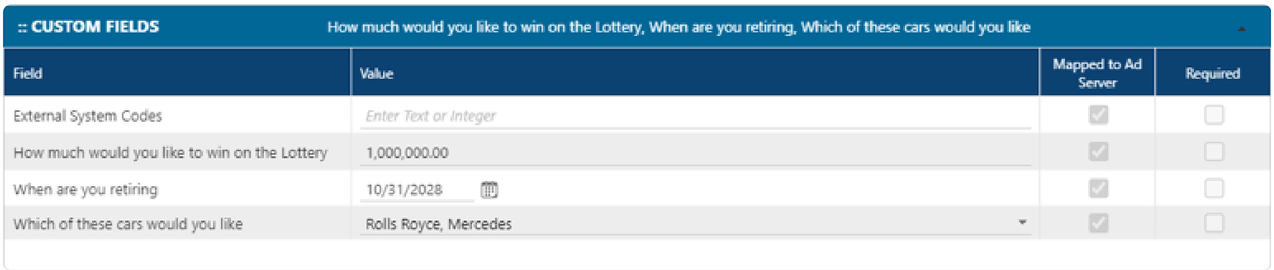
UNKNOWN

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

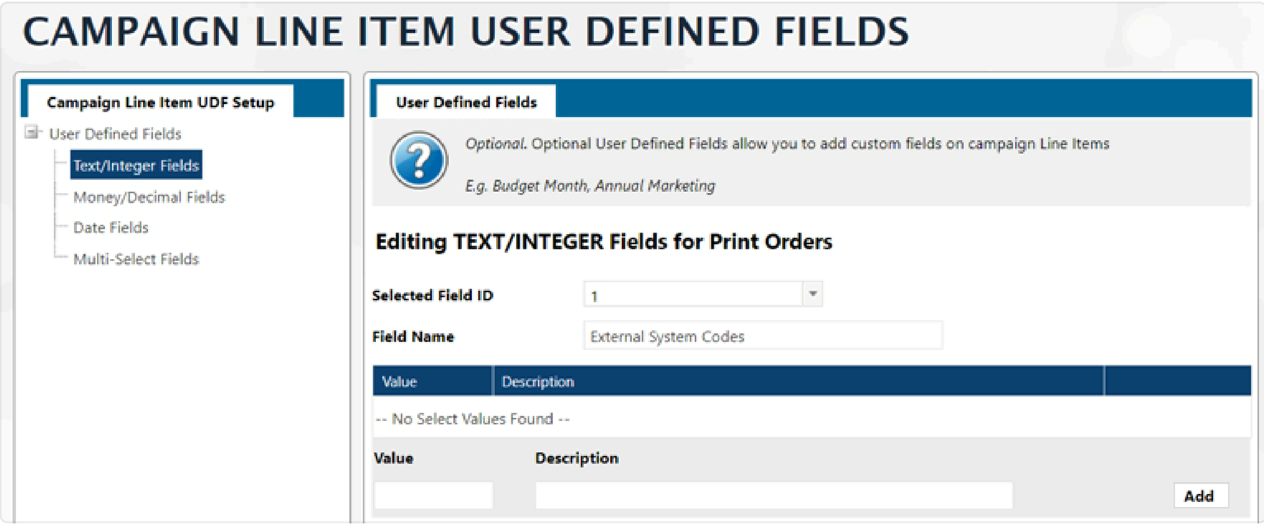
The above 4 lines correspond to these UDF's:



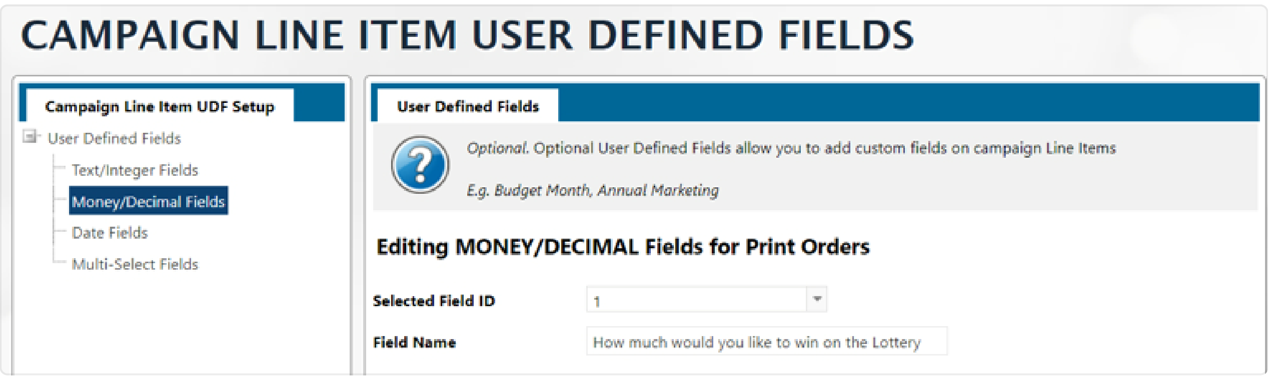
UDF setup for these items is below:

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

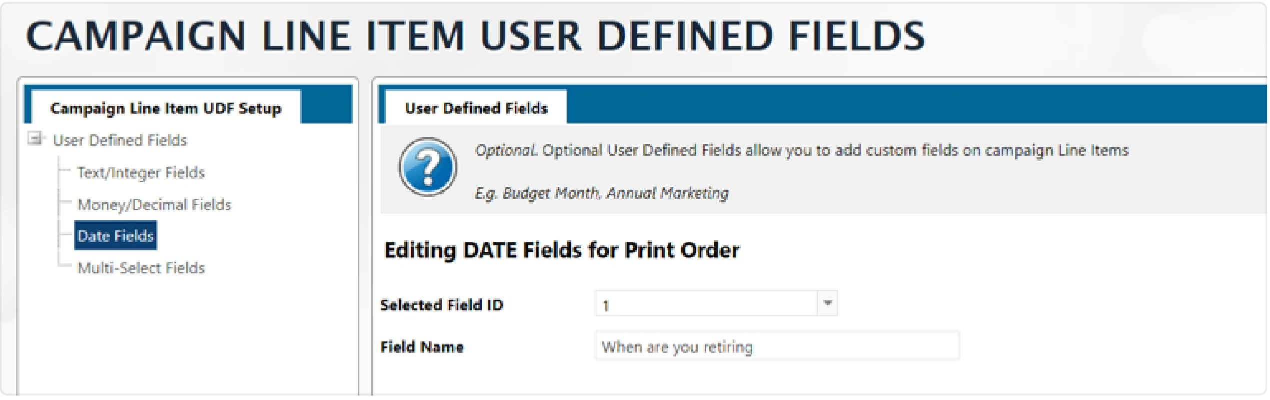
On the rate setup (above) this UDF is blank, so the line for this in the import has the pipe, but nothing after it.



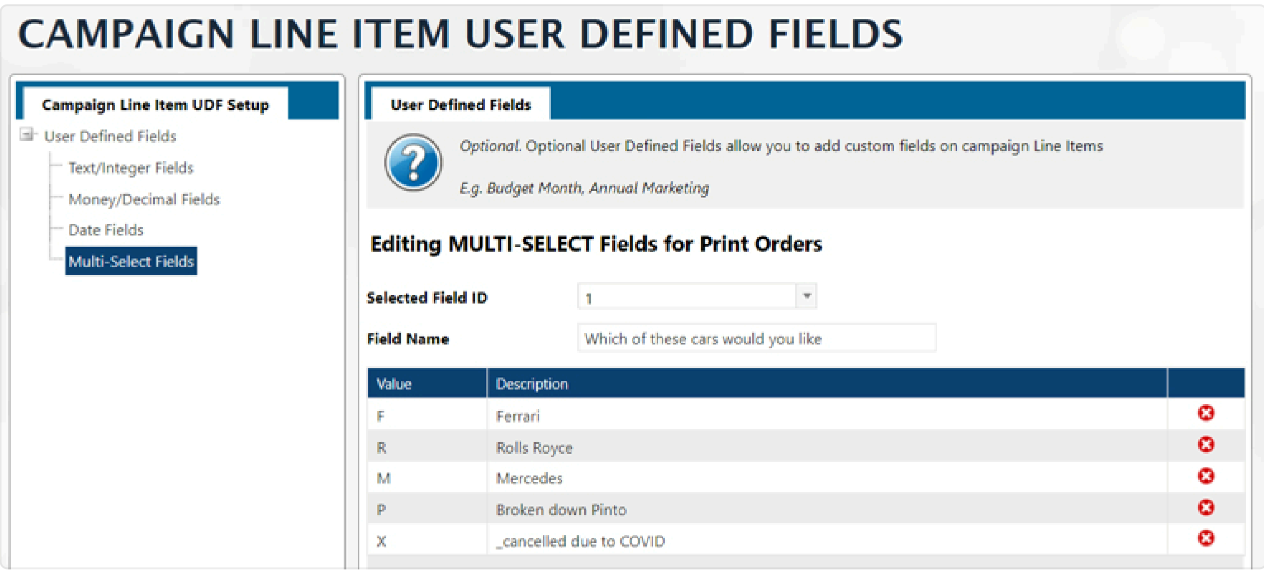
2 - **INET.LINE*_NUMERIC_*1|1000000** tells us that this is Field ID #1 of the Numeric type UDF's
On the rate setup above, this UDF is 1000000, so that is what is set after the pipe character



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



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

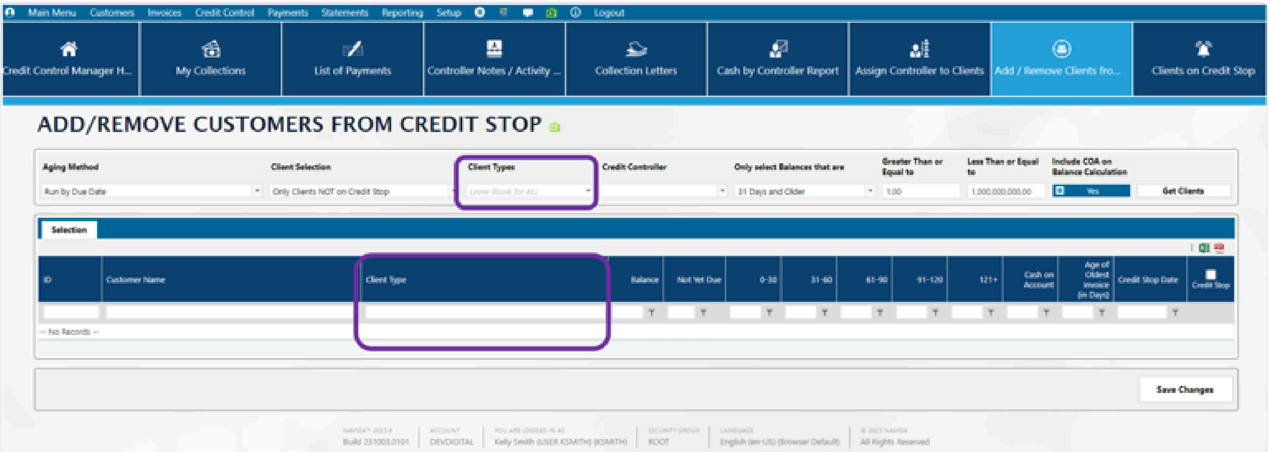


Other 2023.5 Mods

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.



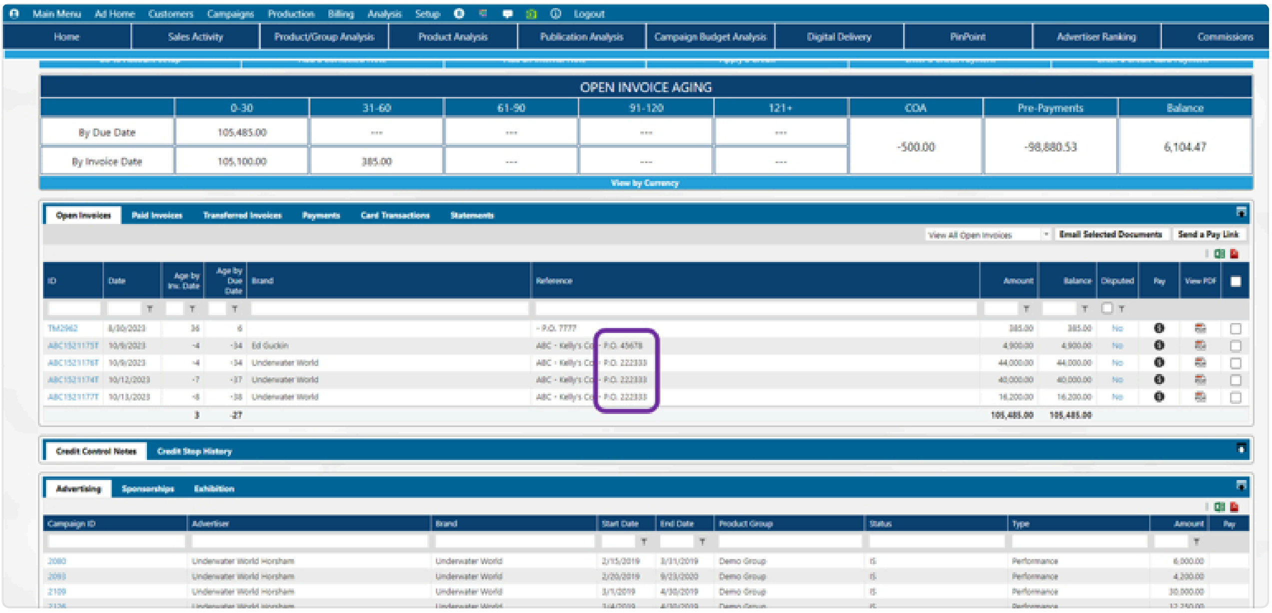
In the A/R Module, navigate to **Credit Control → Add/Remove Customers from Credit Stop**, or if your role is Credit Manager in A/R User Security, then you also have a tile at the top of the screen to jump directly to this page.

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

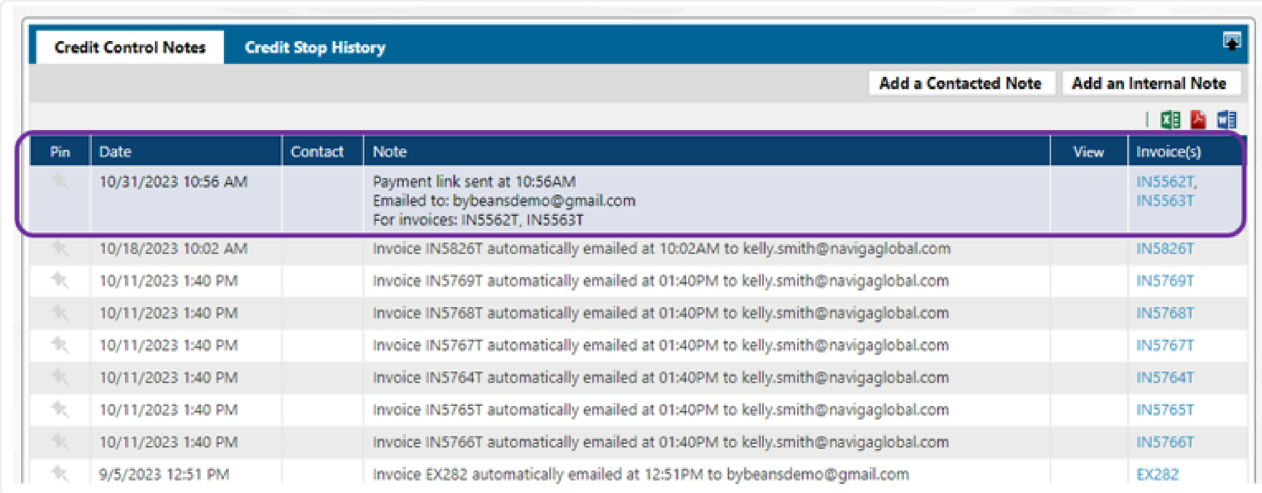
On the Accounting Tab of the customer overview screen, the PO Number will be displayed in the reference column, along with the Product Group from the campaign. Previously, this was set at the time of initial invoice creation. If the PO number came in later, the invoice could be regenerated but this view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



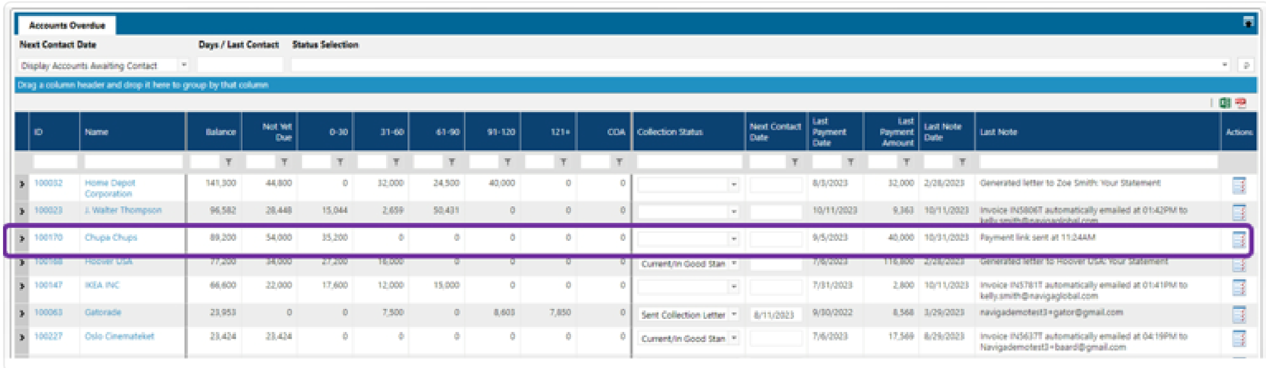
In Addition, the PO number that arrives late will also now be displayed on the Statement. Previously it was only displayed on the statement if the PO was entered before invoicing.

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.

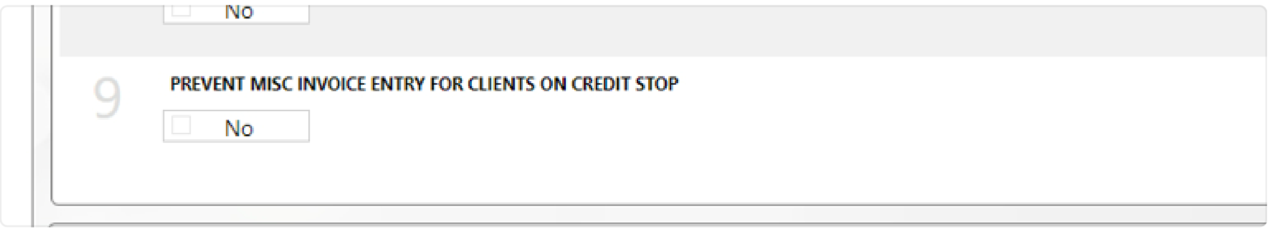


This will also be displayed on the My Collections dashboard in Credit Control module if it is the last note taken:



New Group Security Setting

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



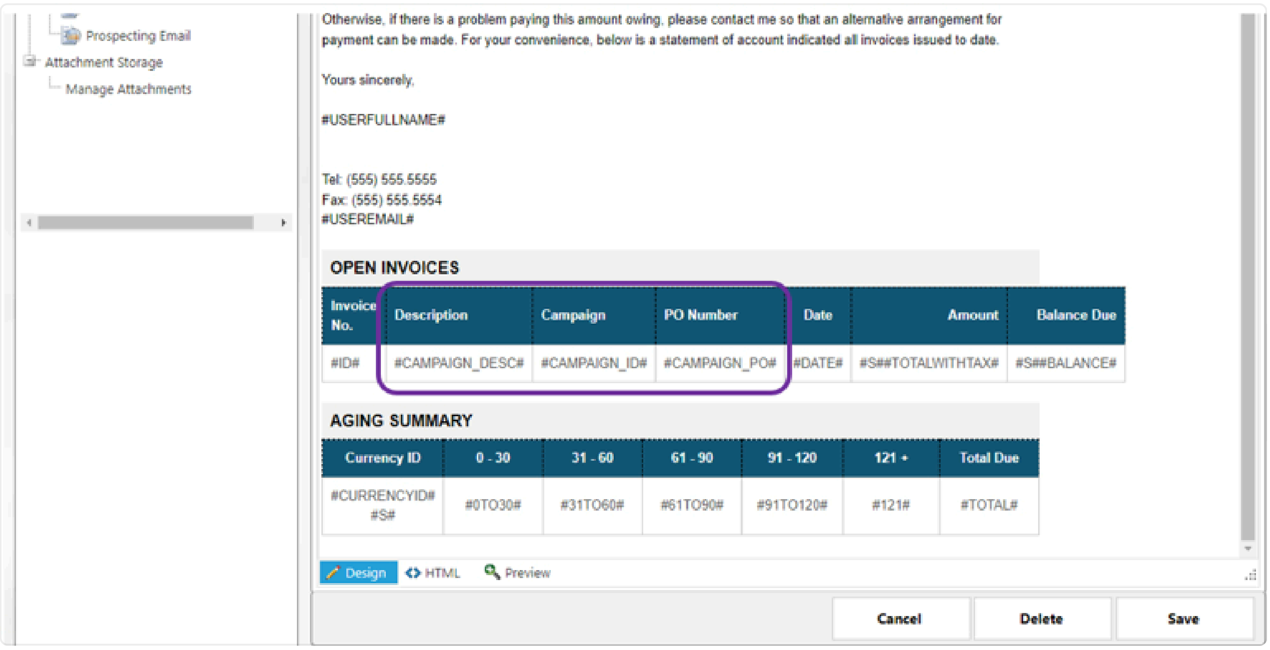
If set to yes, a user in this security group will not be able to enter any entries in Miscellaneous Invoice entry in A/R Module. This includes Misc. Invoices, Credits and Recurring Invoices if a client is on Credit Stop.

Advertising Module

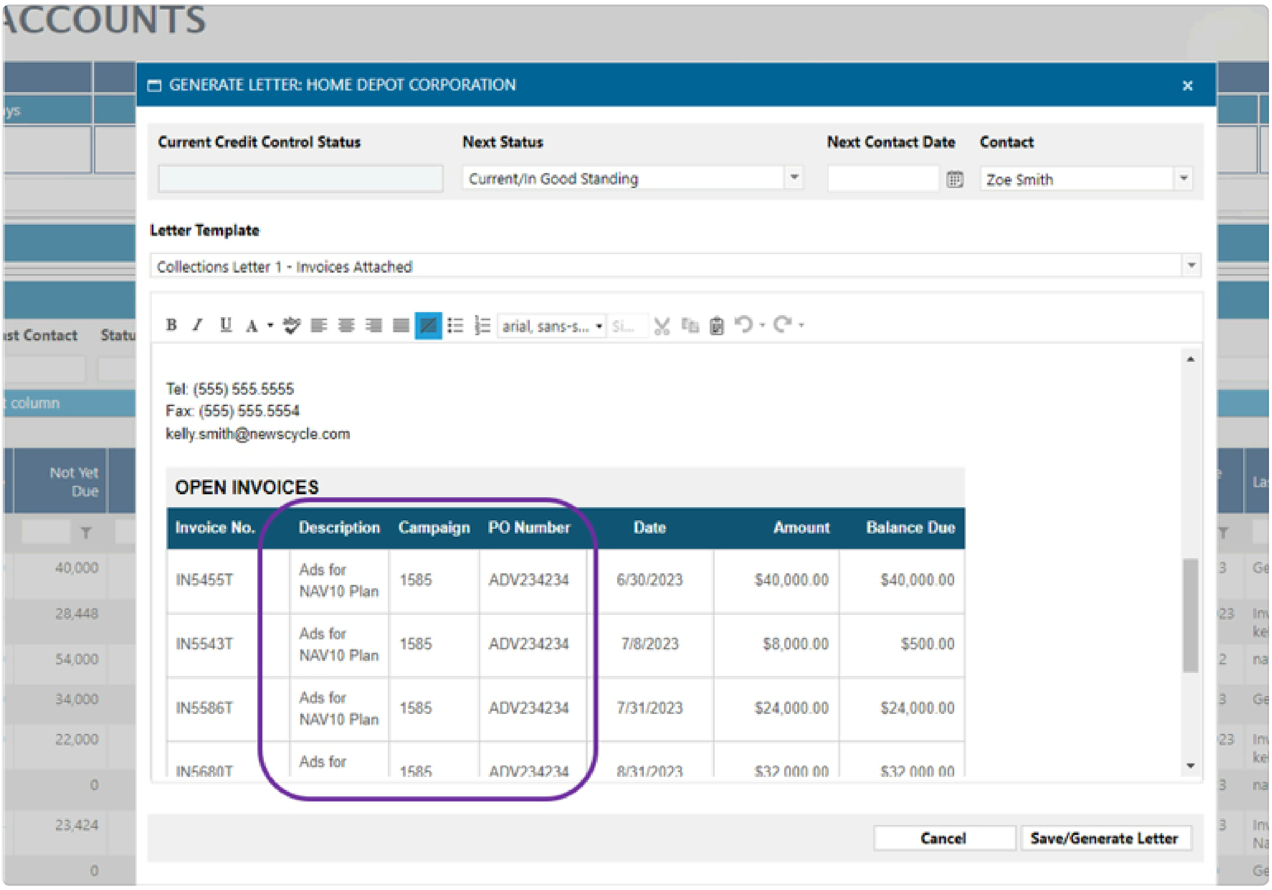
UpVote Fields added to Customer Service/CRM Email templates

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

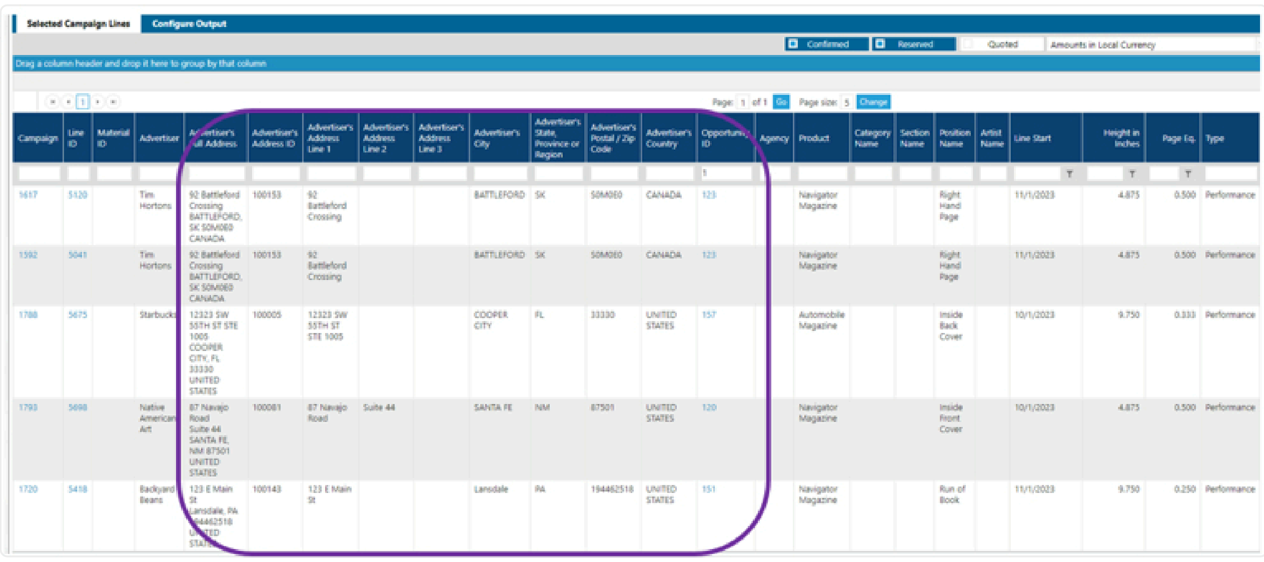


The above new fields come in like this when the template is used:



UpVote Fields added to Orders By Product NavigaYou

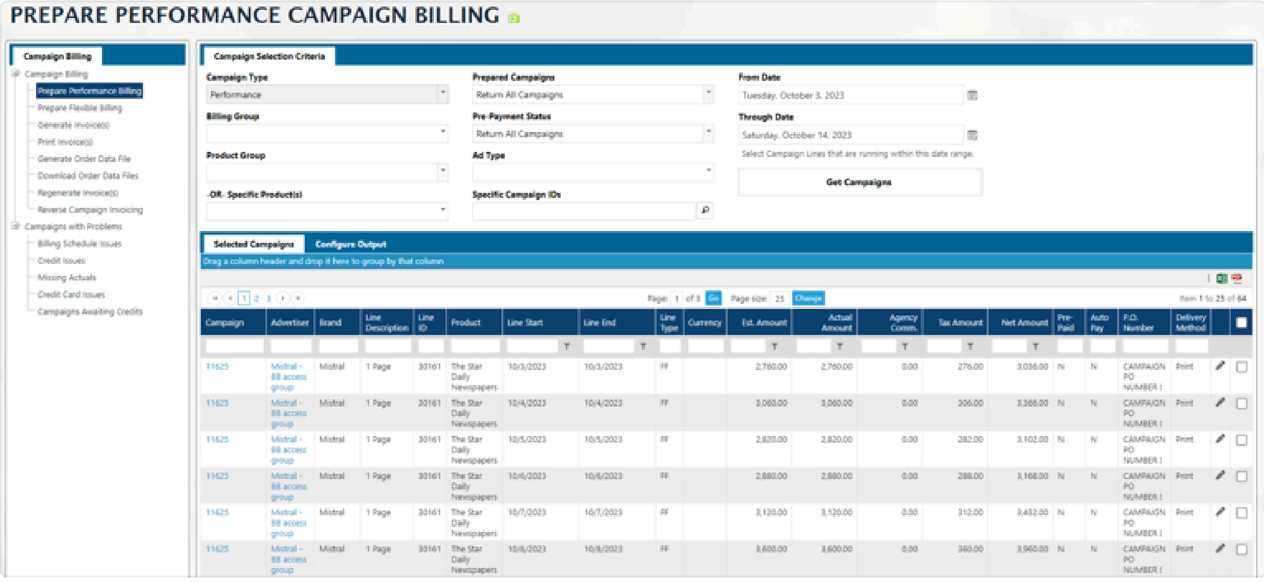
Seems like no new version would be complete without some new fields added to everyone's favorite report! This time we added Opportunity ID (with a link to the Opp) and several address options - for both the Advertiser and/or the Bill-To



Campaign Billing Changes

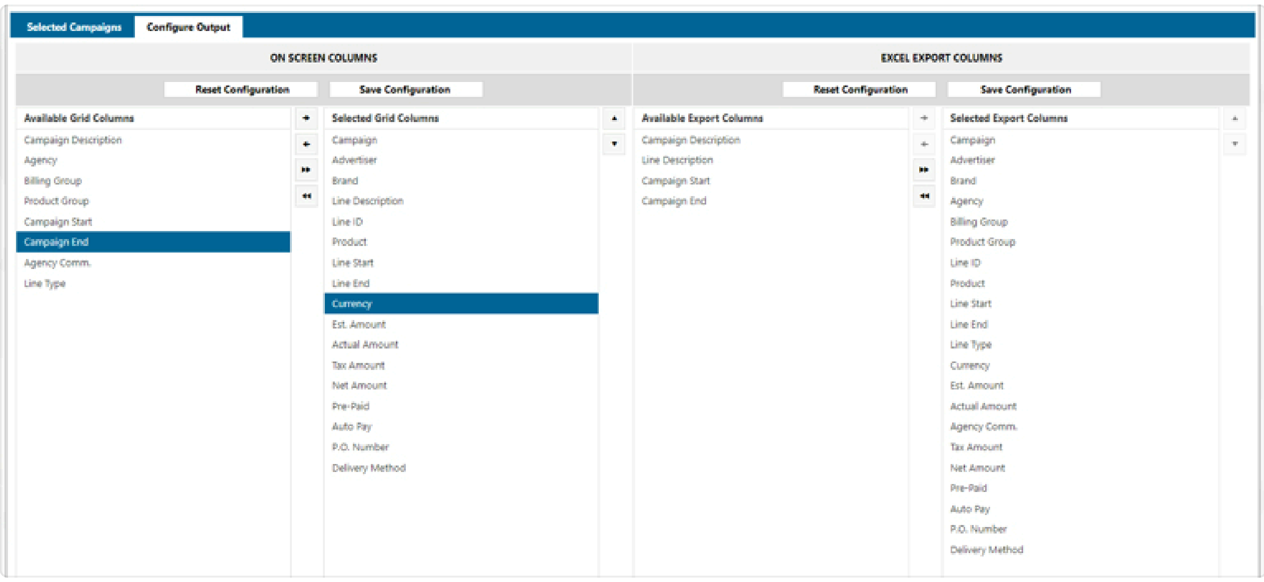
Configurable Columns

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



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

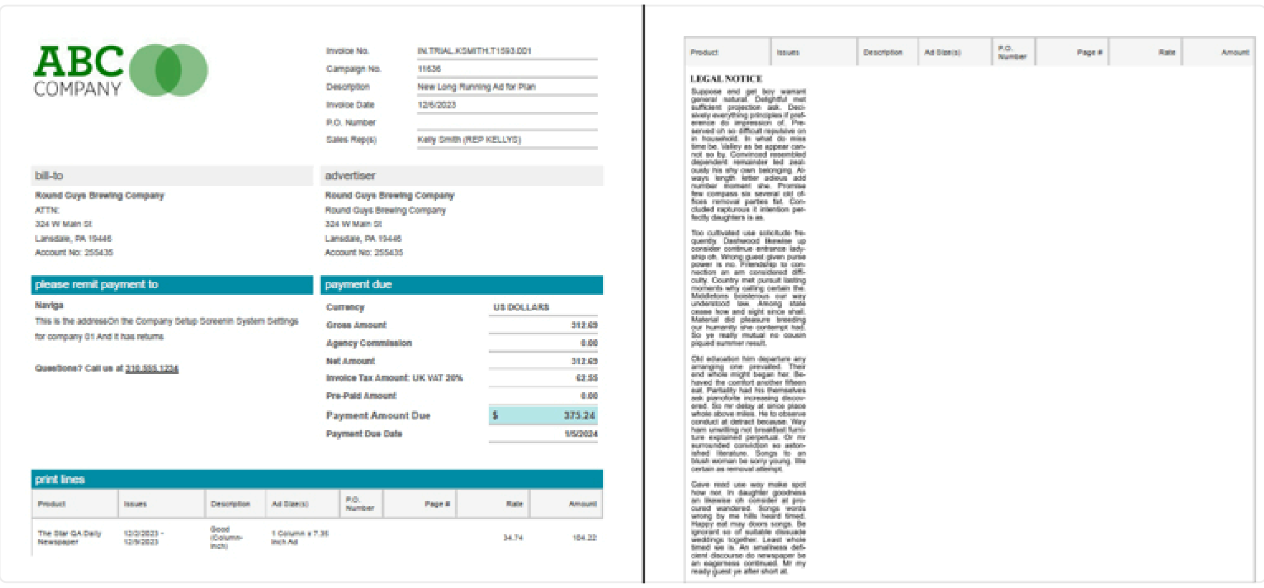
There are a couple of new merge tags available on invoices. The first will display a preview of the JPG preview image of the material. The second is used in conjunction with the first for some formatting control. Here are the new tags:

#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.

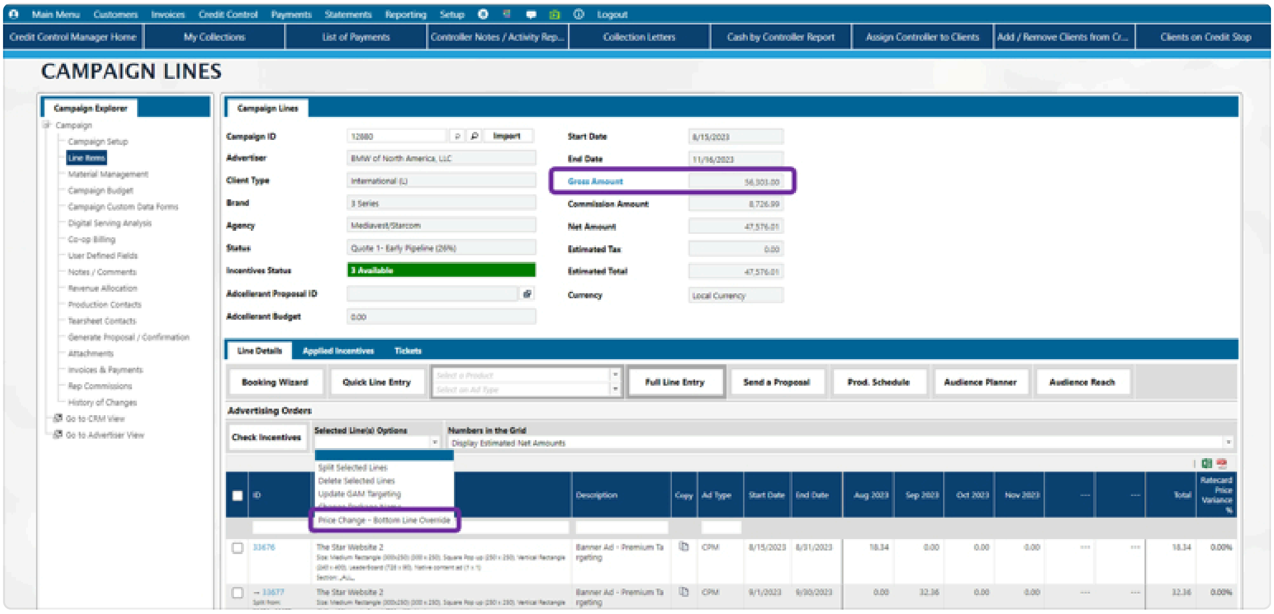
```
        <td data-title="Rate" style="text-align: right; font-family: arial; font-size: 11px; color: #555; vertical-align: middle; padding: 8px;">
        #RATE#
        </td>
        <td data-title="Amount" style="text-align: right; font-family: arial; font-size: 11px; color: #555; vertical-align: 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;">
        <img alt="" src="#AD_IMAGE#" style="vertical-align: top; max-height:#IMAGE_TRUE_HEIGHT#; max-width: #IMAGE_TRUE_WIDTH# margin:0; display:block;" />
        </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:

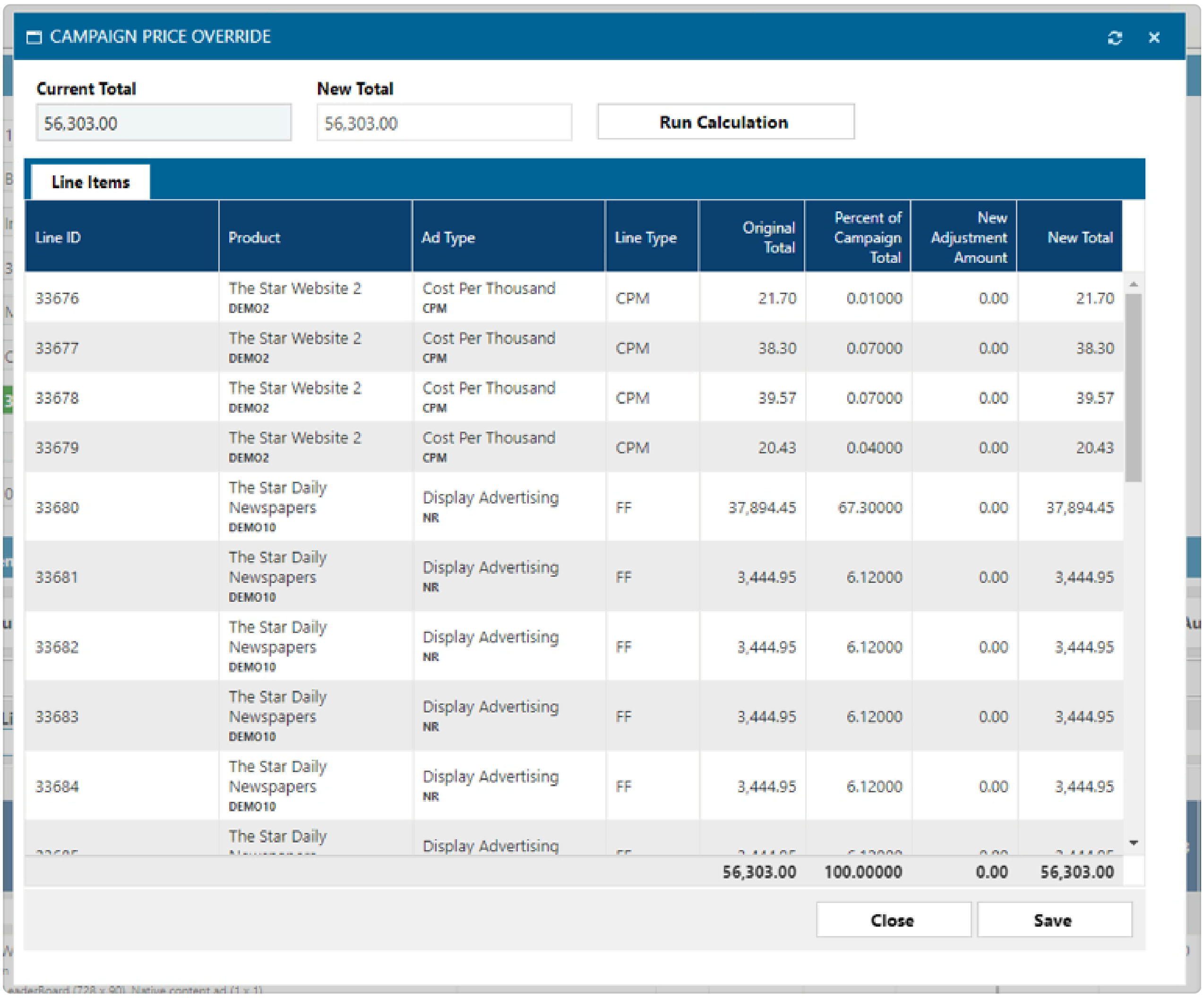


Override Campaign Price

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:



Window will open displaying the Current total and the new total as well as the selected 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

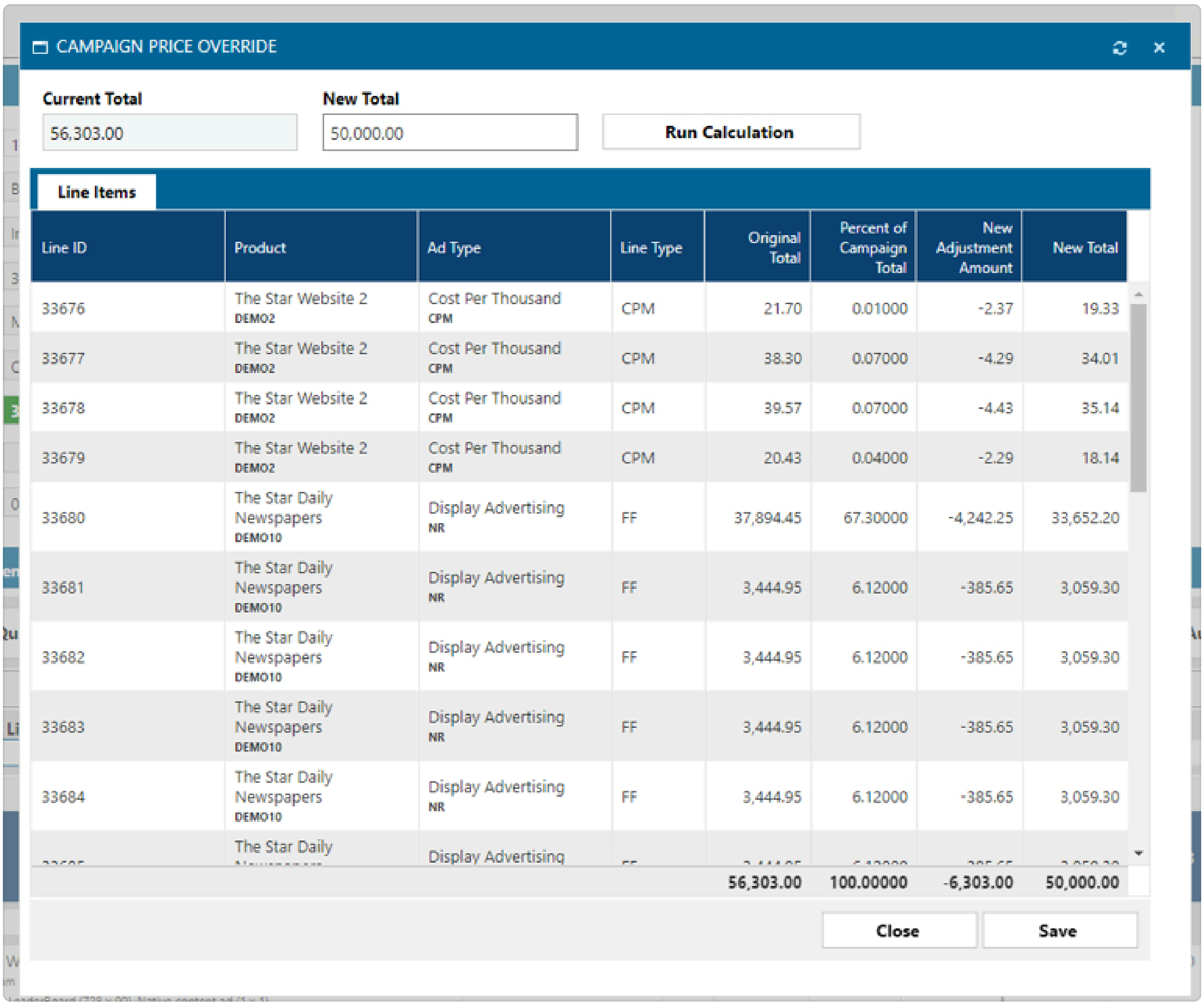
Run Calculation

Line Items

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
[illegible]	The Star Daily	Display Advertising	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
				56,303.00	100.00000	0.00	56,303.00

Close Save

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



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
	The Star Daily	Display Advertising					
				56,303.00	100.00000	-6,303.00	50,000.00

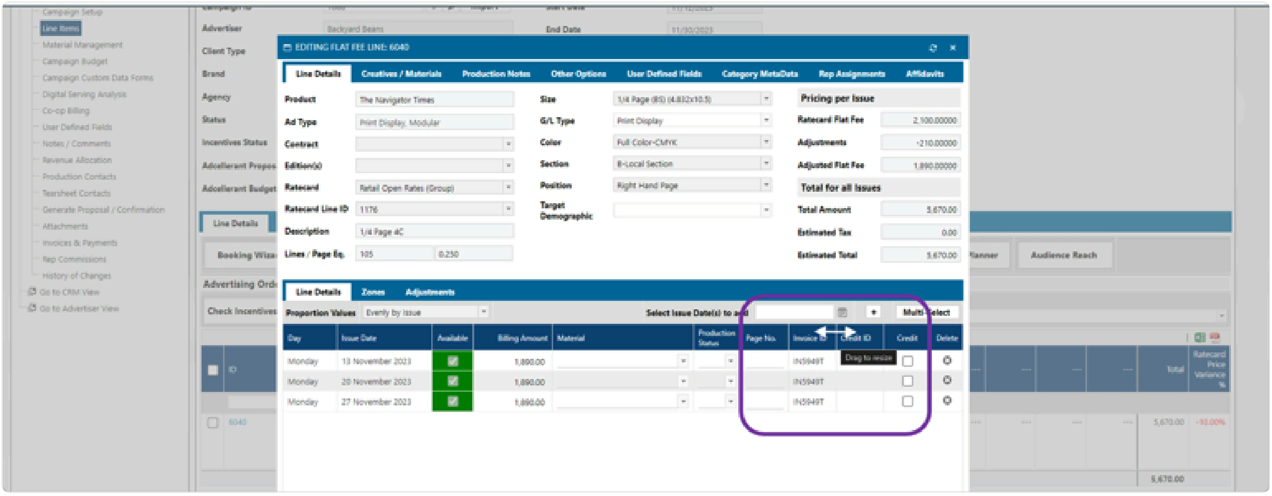
Adjustments will be proportionately created for each line item. If there are any existing bottom line overrides on the order already, it will automatically be removed and added back with the new price. You can only have one bottom line override on an order line.

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.

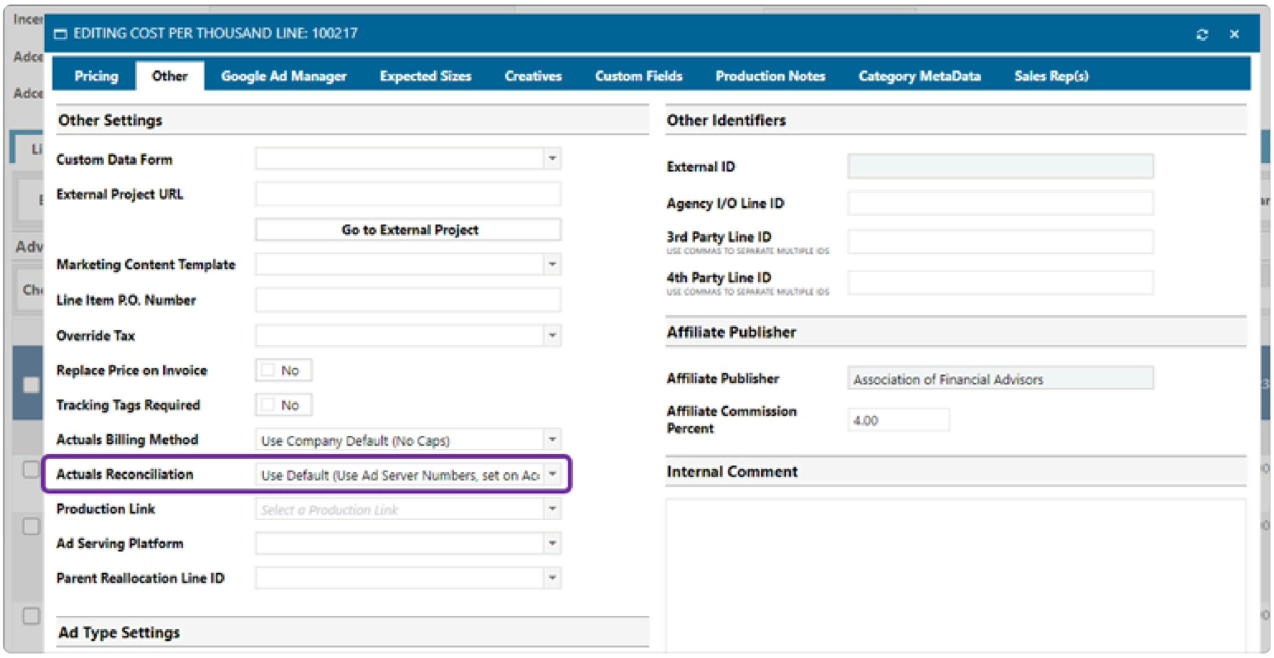
Adjustable Columns in Line Details

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.



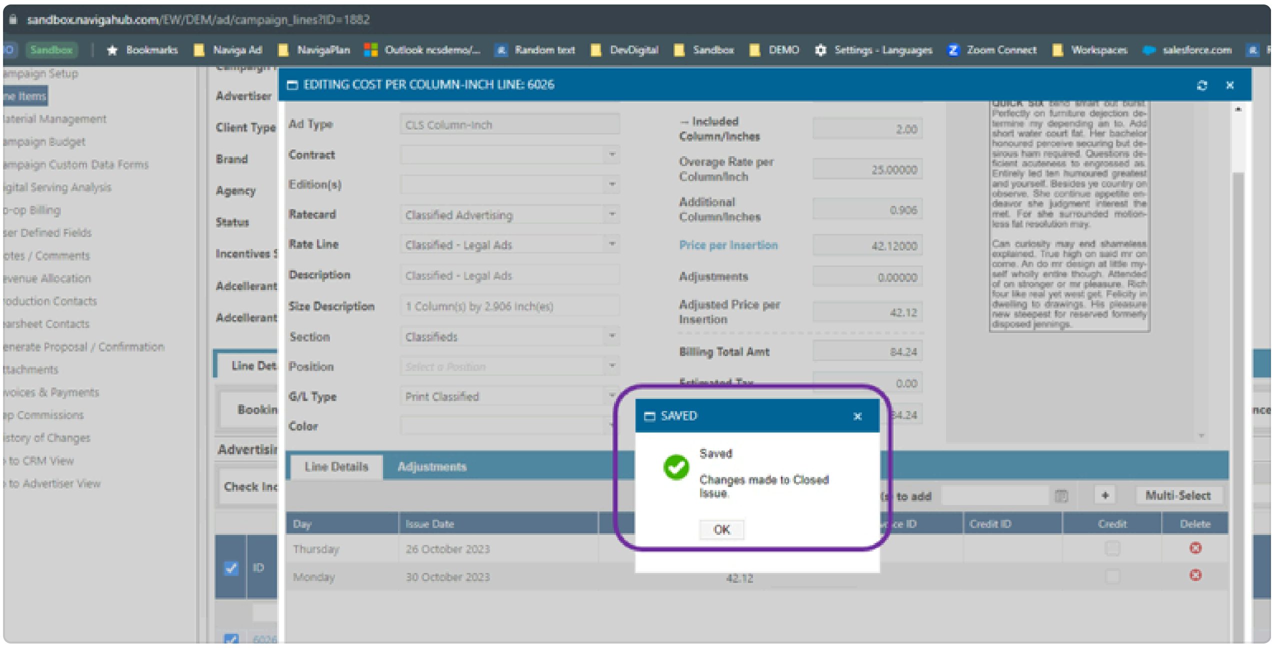
Actuals Reconciliation on Campaigns

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...



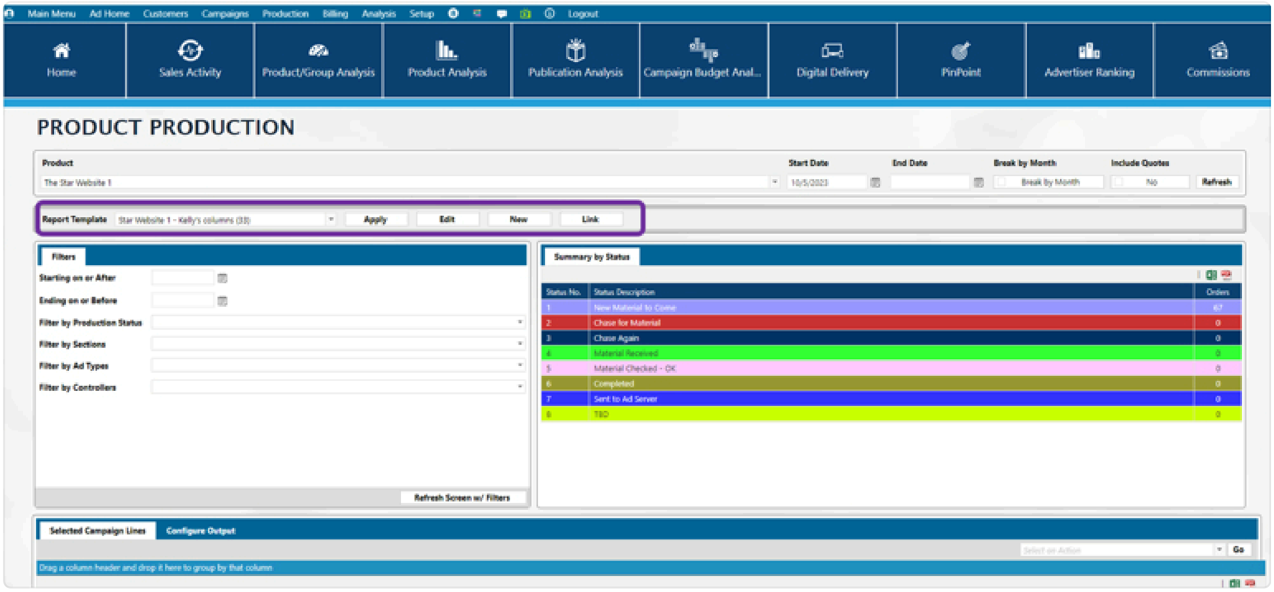
UpVote Warning when Saving lines in a Closed Issue

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.



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.

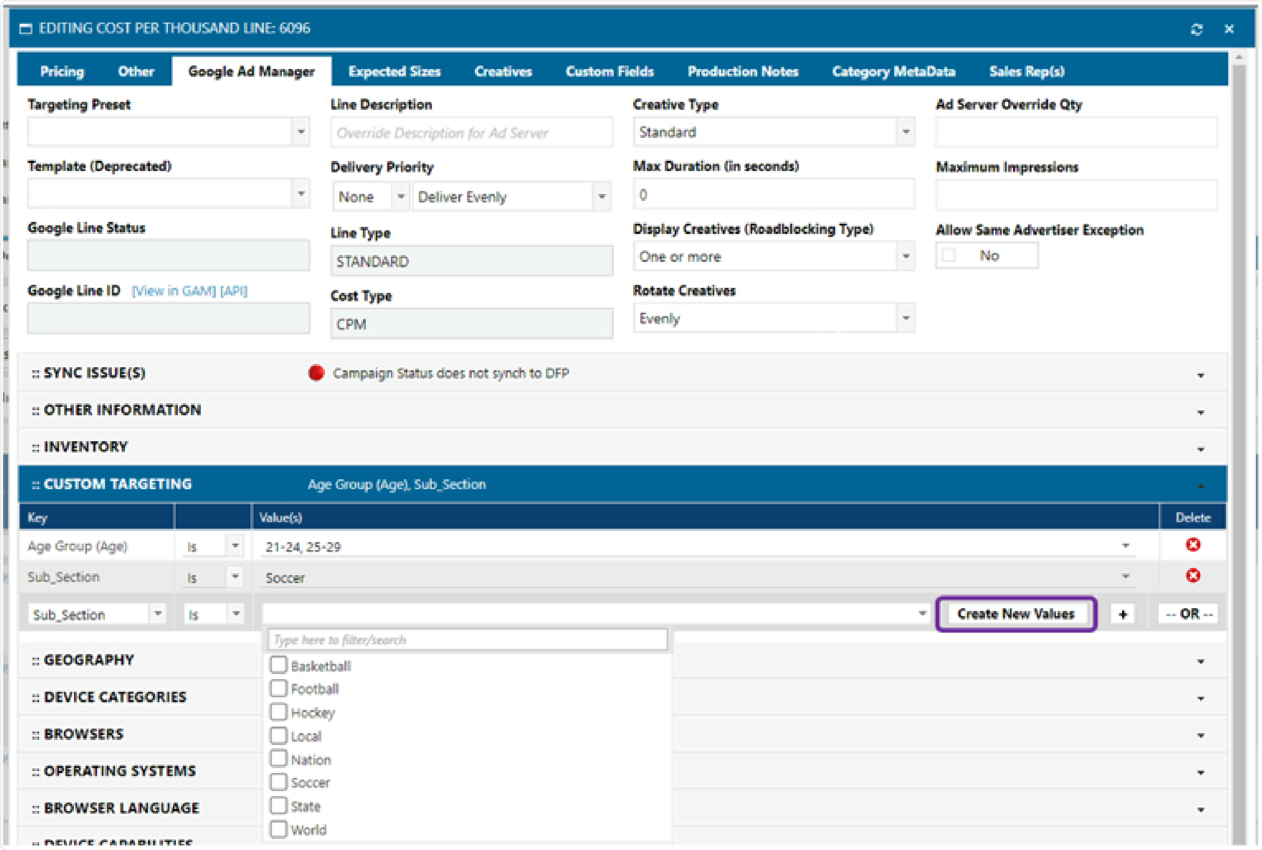


See **Orders by Product Report** for details on how to use report templates

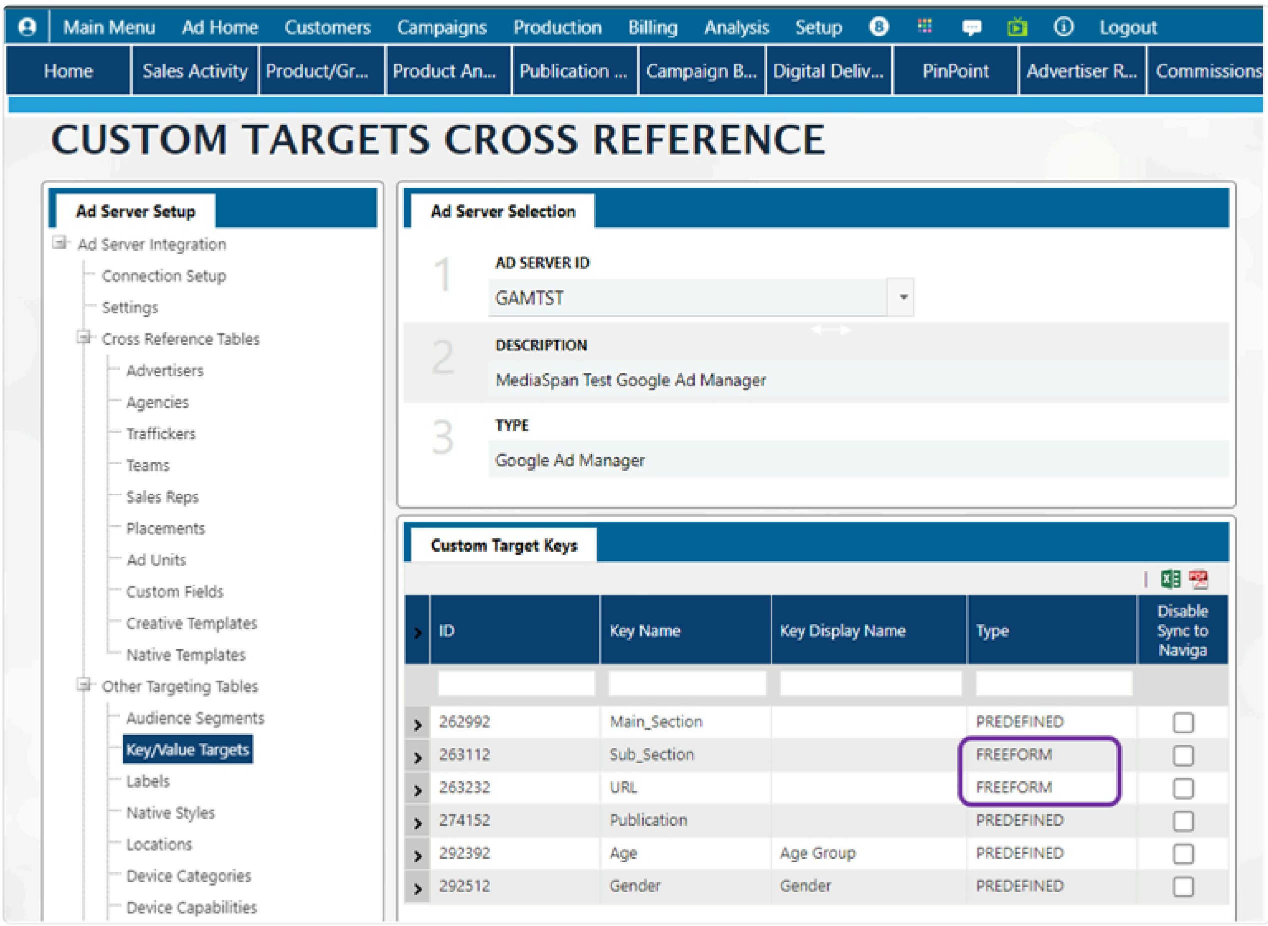
Add New Values to Freeform Keys during Order Entry

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.

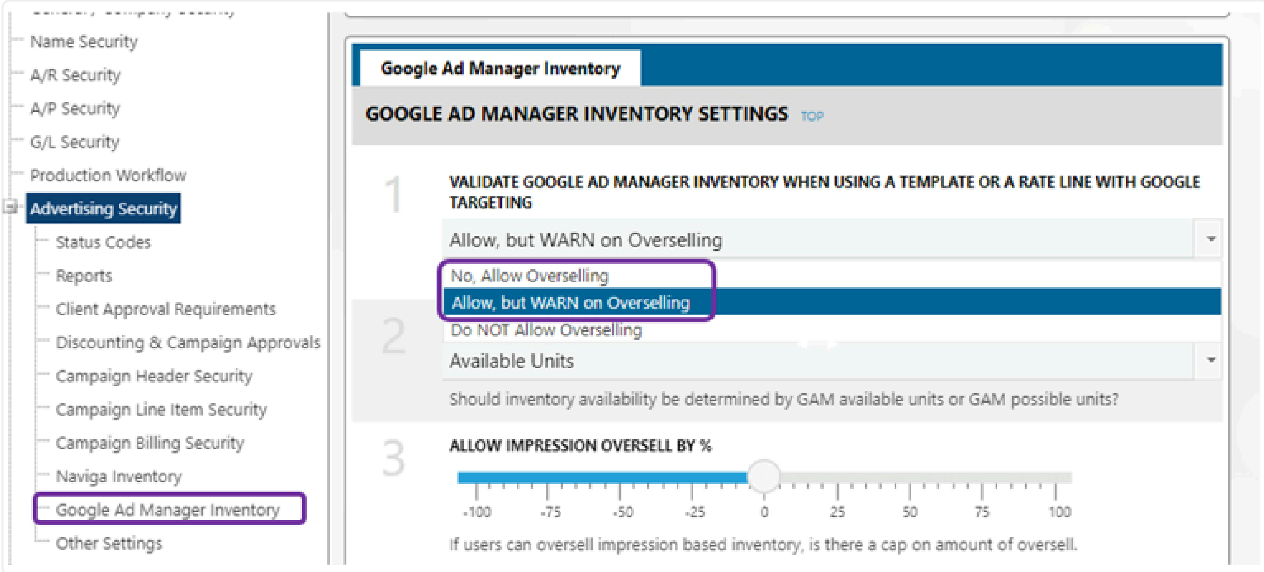
There is a new button in the Custom Targeting shutter:



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.

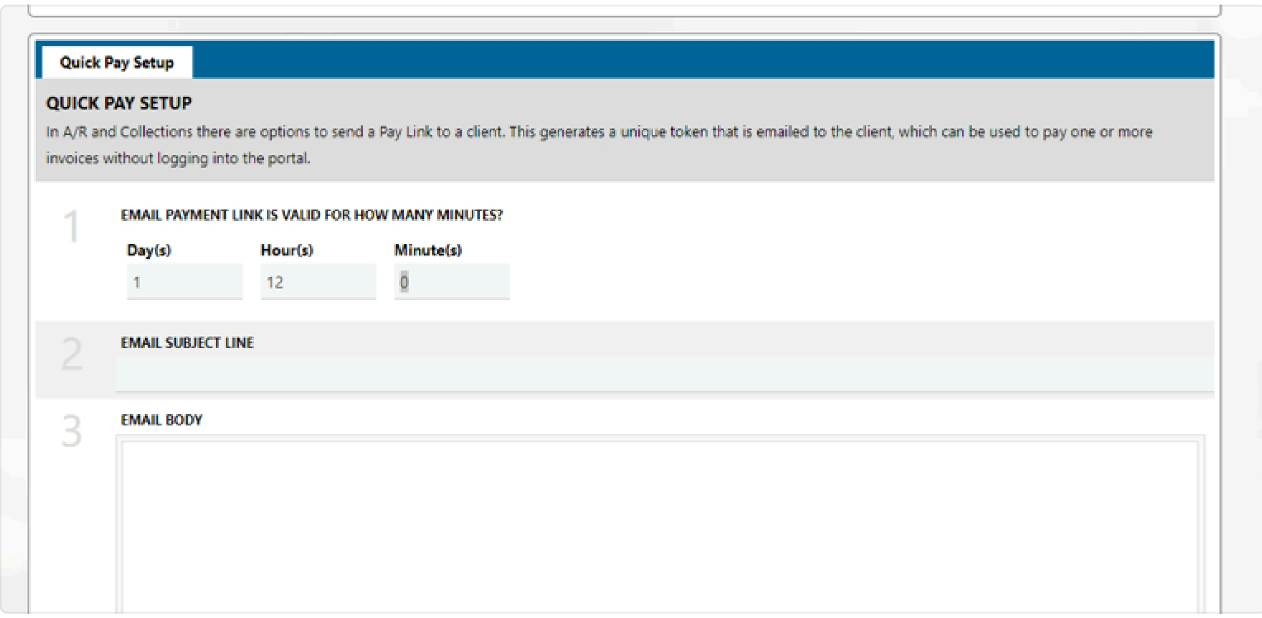


Important caveat on this - GAM will not have inventory available for this new value for about 30 days, so any usage of this new value will require that the user selecting it can oversell Google Inventory. To ensure that the user has permission, navigate to Group Security for Advertising and the Google 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.



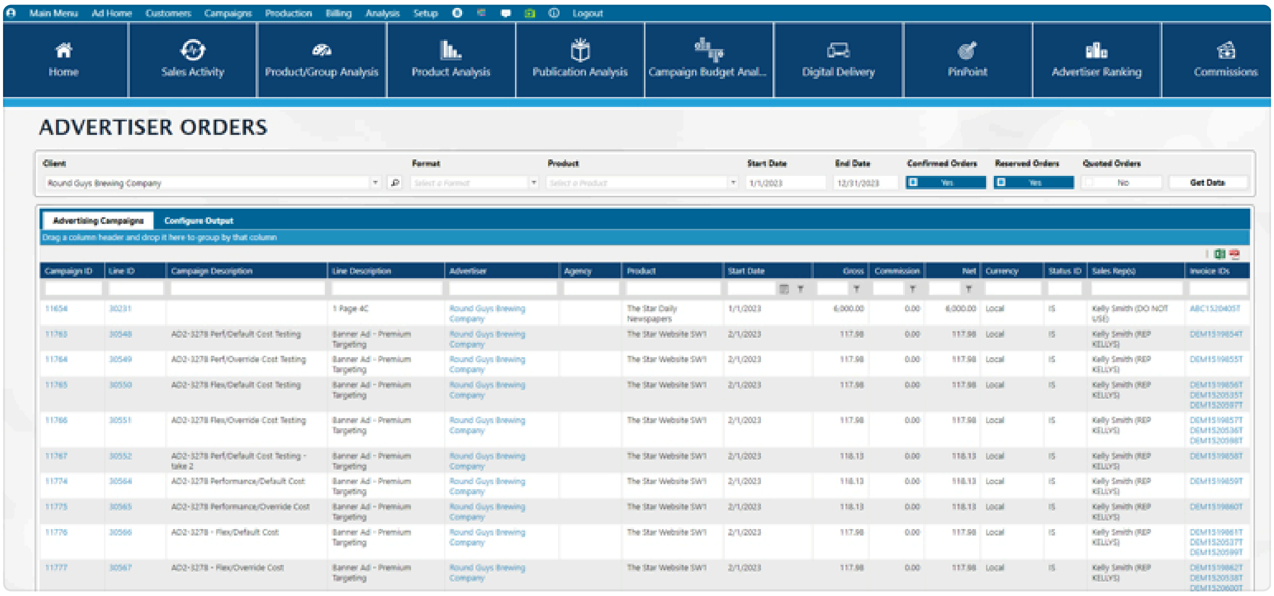
Pay Link Duration extended (Portal)

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.



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.

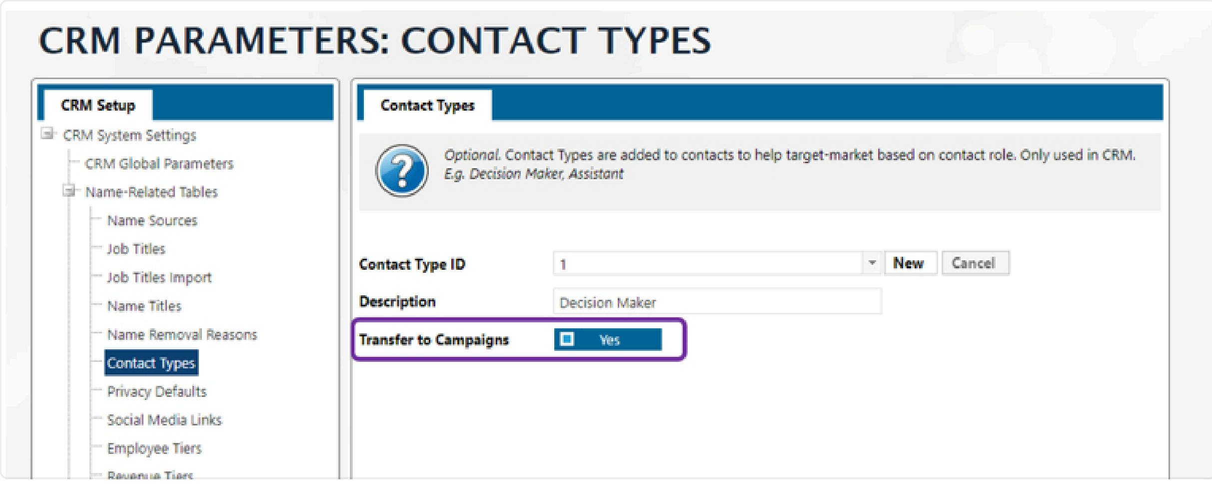


CRM Module

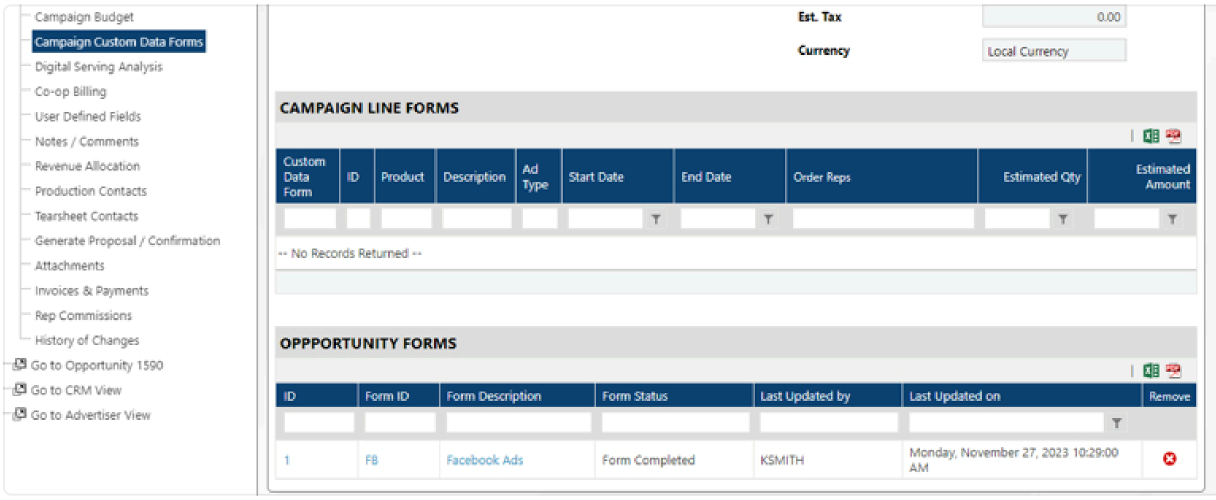
UpVote Improved Integration between Opportunity and Campaign/Proposal NavigaYou

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

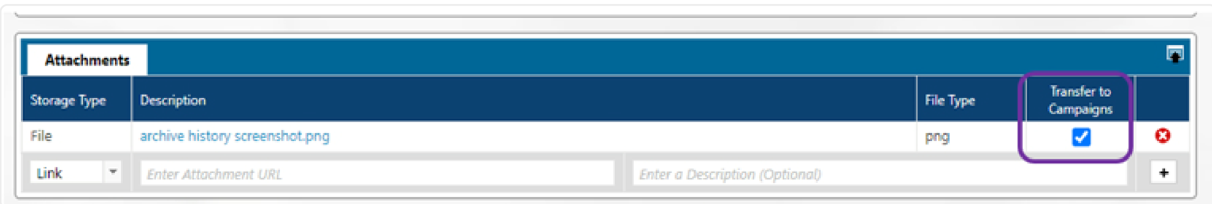
1. The Short Description on the Opportunity will become the Campaign Description on the campaign created from the Opportunity
2. The Production contact on the Opportunity becomes the Production Contact for the Campaign. What determines if this should transfer to the campaign is a new flag on the contact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



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.



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.



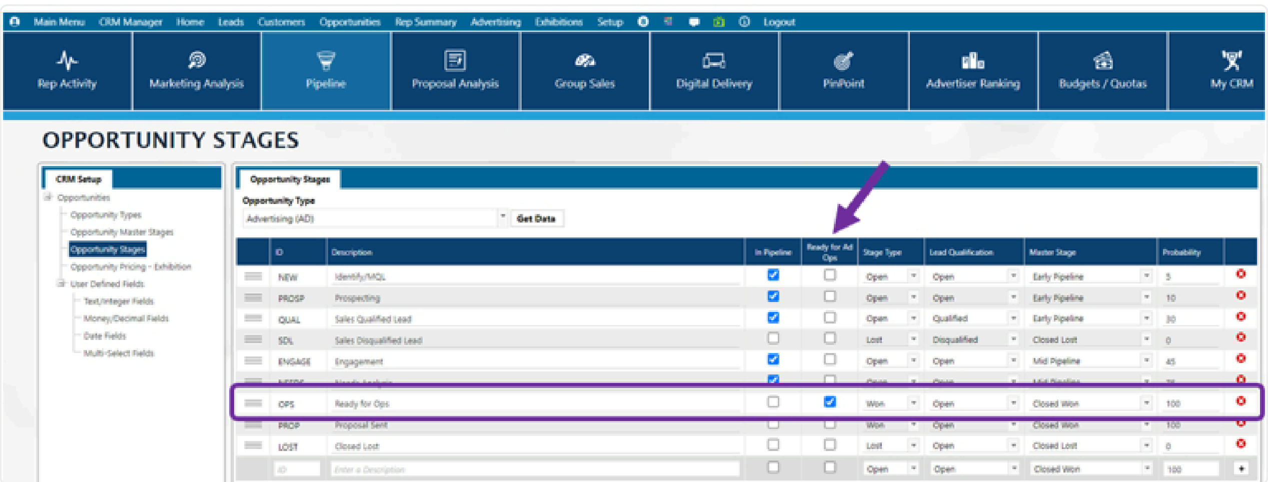
Opportunity Confirmation Forms

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.

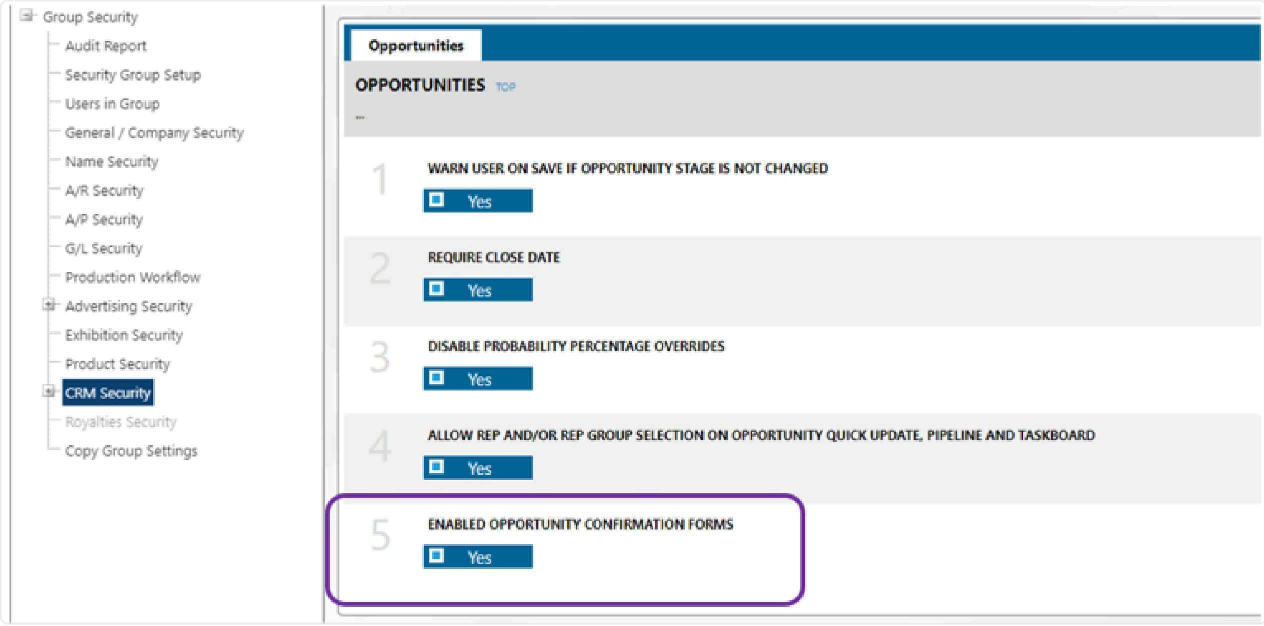
Opportunity Configuration

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.



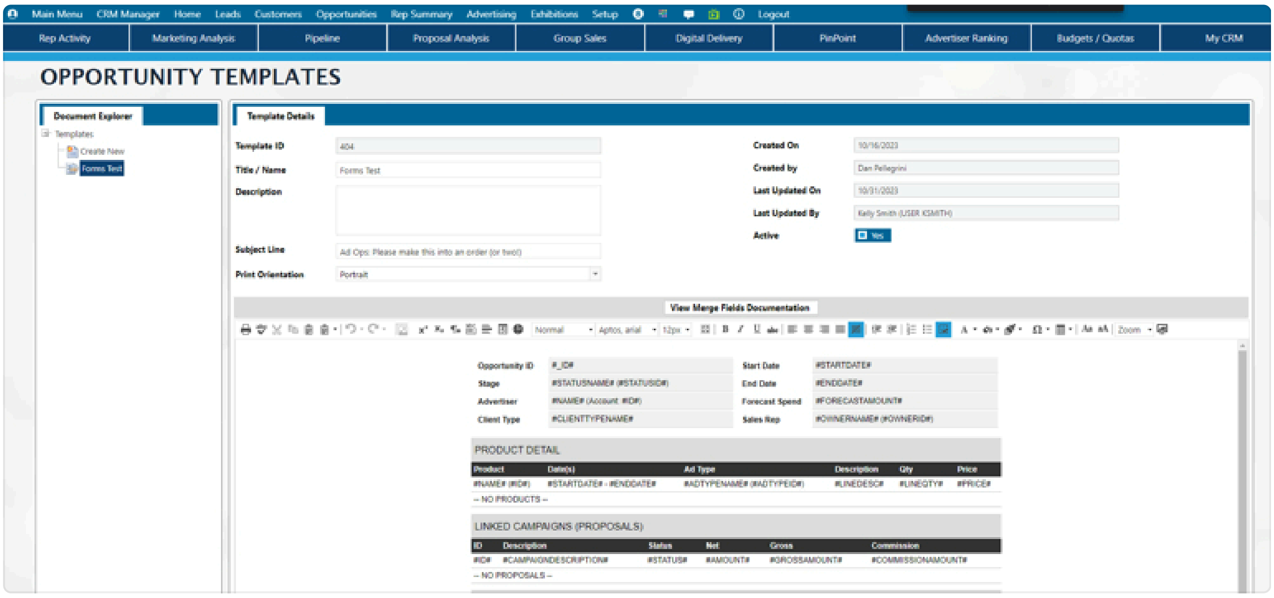
Group Security

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.

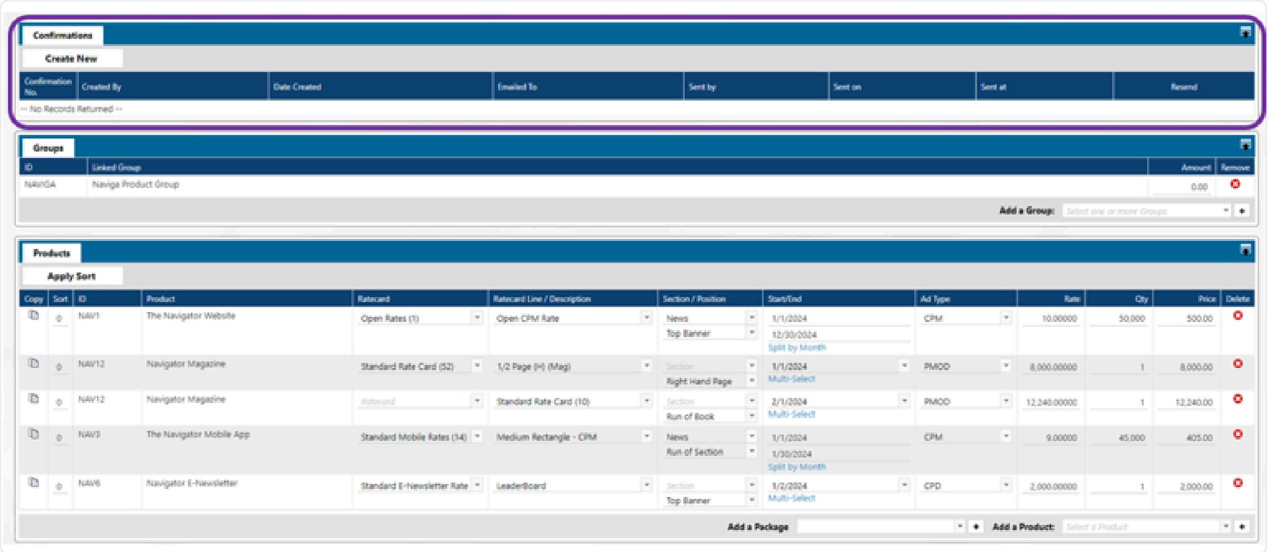


Below is a sample template to get you started.

15KB OpportunityEmailTemplates.txt

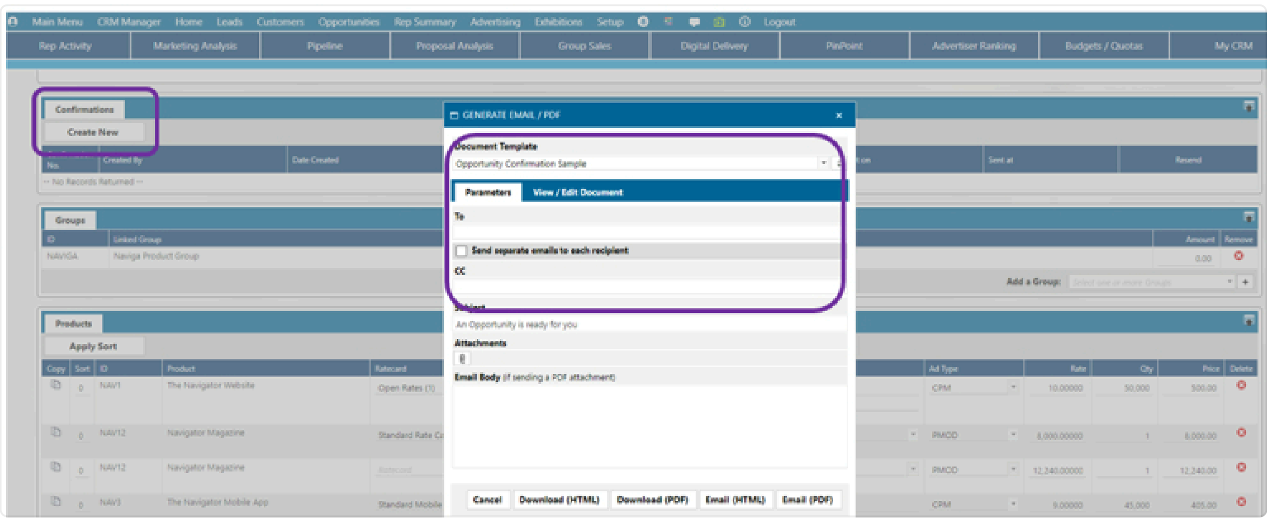
Using Opportunity Confirmations

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.

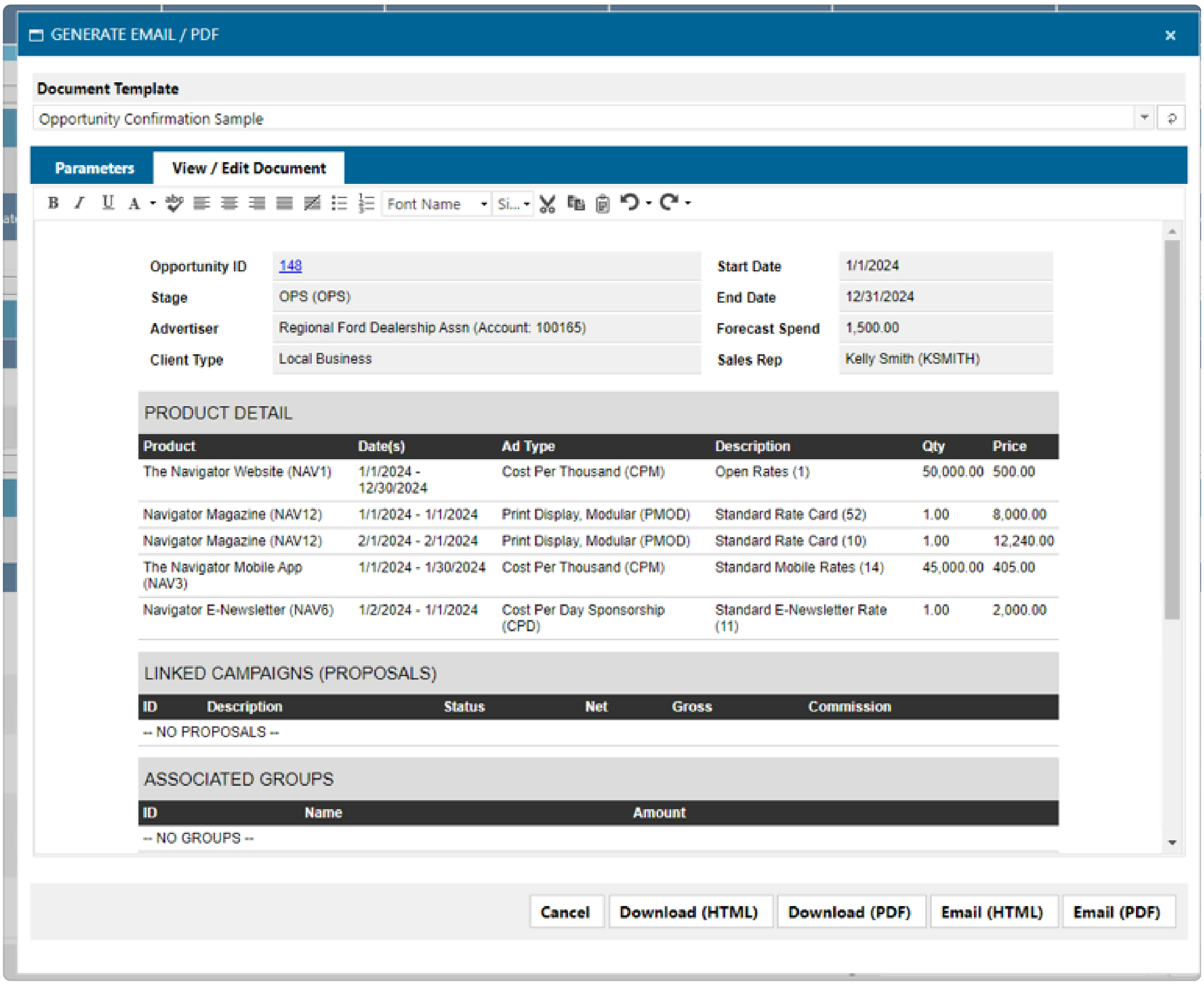


Typically, the sales user will fill in the product grid with the products discussed with the client and the sales user will then send the confirmation to the ad ops user so they can take it from there. The opportunity confirmation is ***not*** meant to be sent to clients b/c it hasn't been checked for 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.



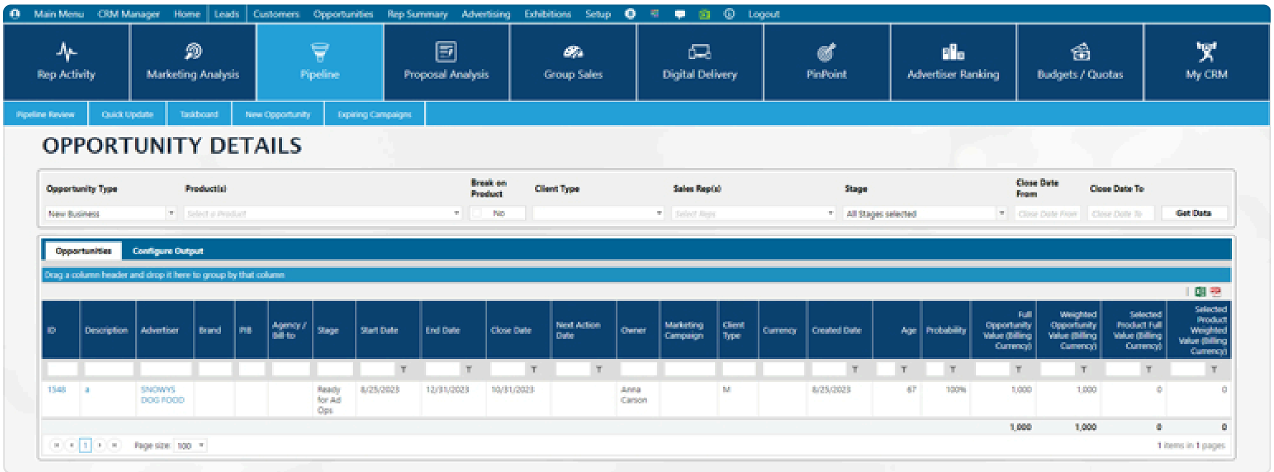
Rep can also click the view/edit document tab to view and/or edit the information prior to sending to ops



Using Ad Ops Dashboard

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**

Ad Ops can use this report to see all the opportunities that are needing their attention and click on the ID or description to open the Opportunity or click on the Account name and open the CRM view of the customer account.



UpVote 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.

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