

User Guide 2022.2



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User Guide 2022.2

Purpose

The purpose of this document is to provide users with the details of 2022.2 new features including steps and screenshots.

Advertising Module

Start Date Entry and Match Days of the Week when Copying Lines

When copying a line item to another line item on a campaign from the quick line entry, there's an option to choose the start date and match days of the week from the original line to the copied line.

Navigate to a campaign and click "Quick Entry" and choose the option to copy a campaign line. You can enter the start dates.

The screenshot displays the 'QUICK LINE ENTRY' window. On the left is a sidebar menu with options like 'Revenue Allocation', 'Production Contacts', 'Tearsheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', 'History of Changes', 'Go to CRM View', and 'Go to Advertiser View'. The main area has tabs for 'Lines' and 'Category MetaData'. Below these are buttons for 'Delete All Lines' and 'Book All Issues', along with a 'Default Pricing Contract' dropdown and a 'Discount Percent' field. A table with columns 'Delete', 'Product', 'Ratecard', 'Ratecard Line / Description', 'Section / Position', 'Start/End', 'Ad Type', 'Qty', 'Rate', and 'Price' is shown, currently displaying '-- No Records --'. A 'COPY OPTIONS' dialog box is open in the center, featuring a 'Start Date' field with a calendar icon (showing 'Tuesday, March 1, 2022') and a 'Match Days of Week' section with a checked 'Yes' checkbox. A red arrow points to the 'Yes' checkbox. At the bottom of the dialog are 'Cancel' and 'Add Lines' buttons.

Check the box "Match Days of Week". And click Add Lines.

QUICK LINE ENTRY

Select a Package

[this will first clear the grid]

Or Copy from Campaign

this will first clear the grid

9309

or Select a Product

Select a Product

— and an Ad Type

Select an Ad Type

— And a Rateline

[this will add a line to the top of the grid]

Select Rate Line

Lines

Category MetaData

Delete All Lines

Book All Issues

Default Pricing Contract

Discount Percent

0.00000 %

of Net

Delete	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
✖	Astronomy Magazine WP	275	1214 1 Page Color VIEW PRODUCT INFORMATION	Display All	3/3/2022 Multi-Select	NR	1 CHECK INVENTORY	380.00 EFFECTIVE RATE 380.00 RATECARD RATE	380.00
✖	Blackfeet Nation BF	276	1215 CPM Color VIEW PRODUCT INFORMATION	Cultural INV	3/1/2022 3/31/2022	CPM	10,000 CHECK INVENTORY	10.00000 EFFECTIVE RATE 10.00000 RATECARD RATE	100.00
✖	Astronomy Magazine WP		Per Word Color VIEW PRODUCT INFORMATION	Listings Everywhere	3/3/2022 Multi-Select	LCW	1 NOT INVENTORIED	10.00 EFFECTIVE RATE 10.00 RATECARD RATE	10.00
✖	Astronomy Magazine WP		Per Word Color VIEW PRODUCT INFORMATION	Listings Everywhere	3/7/2022 Multi-Select	LCW	1 NOT INVENTORIED	10.00 EFFECTIVE RATE 10.00 RATECARD RATE	10.00

Running Total

500.00

Note that the Start/End Dates days match the copied days of the week wherever possible. So, if the original issues are on a Monday, Wednesday and Saturday, the copied lines will also be on Monday, Wednesday and Saturday.

Then the system prompts you whether to copy material, targeting and other line details tab information.

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QUICK LINE ENTRY

Or Copy from Campaign — and an Ad Type — And a Rateline

Delete All Lines Book All Issues Default Pricing Contract Discount Percent 0.00000 % of Net

Delete	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Qty	Rate	Price
☒	Astronomy Magazine WP	275	1214 1 Page	Display All	3/3/2022	NR	1	380.00	380.00
☒	Blackfeet Nation BF	276	1215				10,000	10.00000	100.00
☒	Astronomy Magazine WP		Per Wc				1	10.00	10.00
☒	Astronomy Magazine WP		Per Wc				1	10.00	10.00

Running Total 500.00

View Package Inventory Cancel Check Line Inventory Create Lines

COPY

Copy Targeting, Material and Other Line Details

☒ Yes

NOTE: Manual adjustments on copied lines will not be carried forward to the new lines. Incentives will need to be re-checked and applied.

Cancel Copy

If you do want the copy, then the flag must be at a “Yes” value and you can click Copy.

G/L Override by PIB Code

G/L Code Override is available by PIB Code on the Product Setup screen. This allows campaigns with a PIB code set for the override code to have them posted against this override G/L Code.

Navigate to the menu Setup -> Product Setup -> G/L Overrides node and choose a product from the drop-down.

[Campaigns](#)
[Production](#)
[Billing](#)
[Analysis](#)
[Setup](#)
[Logout](#)

[Product/Group Analysis](#)
[Product Analysis](#)
[Publication Analysis](#)
[Campaign Budget Analysis](#)
[Digital Delivery](#)
[PinPoint](#)
[Advertis](#)

Product Setup

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

G/L Overrides

Product
Astronomy Magazine

G/L Defaults

Receivables G/L Code
01*00*0000*00*0148
ACCOUNTS RECEIVABLE

Revenue G/L Code
01*00*0002*00*0000
WEBSITE REVENUE

Agency Comm. G/L Code
01*00*0007*00*0000
Agency Commission

G/L Type Overrides

ID	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name
-- No Records --				
G/L Type	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name
Select	Select a Specific G/L A		Select a Specific G/L Acc	

Industry Code Overrides

ID	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name
ALC	01*00*0000*88*3700	DIGITAL BANNER REVENUE	01*01*0003*00*5120	AGENCY COMMISSION
Industry Code	Revenue G/L Code	Revenue G/L Name	Agency Comm. G/L Code	Agency Comm. G/L Name
Select	Select a Specific G/L A		Select a Specific G/L Acc	

Choose the Industry Code from the drop-down, enter the G/L code or type a partial name of the revenue code and the system displays your options. Choose from them and repeat for the Agency Commission G/L code. Click the + to add.

Repeat for several PIB Industry Codes as needed and click the Save button.

Create a campaign with this PIB code and bill the invoice. Click the Invoice Details.

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Company: GEORGE KAHN (60000)

A/R INVOICE DETAIL

Select an Edit Option
Open Invoices Quick Look-up by ID

Header			
Invoice ID	SH1518175T	Source Module	INET
Invoice Date	2/7/2022	Financial Period	2022-02
Entry Date	2/7/2022	G/L Post Date	Unposted
Due Date	3/9/2022	A/R Batch	IN2751T

Financial Summary		
	Local Currency	Foreign Currency
Amount	999.00	0.00
Tax	0.00	0.00
Balance	999.00	0.00

Attachments

Other Details

Payment Details - Local Currency Foreign Currency

Payment / Check ID	Applied Date	Applied Period	Payment Amount	Discount	Write-Off
-- No Records --					

G/L Details - Local Currency Foreign Currency

G/L Code	G/L Description	Debit Amount	Credit Amount
01*00*0000*00*0148	ACCOUNTS RECEIVABLE	999.00	0.00
01*00*0000*88*3700	DIGITAL BANNER REVENUE	0.00	999.00

Order Details

The G/L Revenue code displayed is the new PIB override G/L code you entered on the product.

Change Art Work Status

User can change the art workflow status in the production report screen.

Navigate to the menu Production -> Production by Print Product. Select the query criteria and the data displays.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

Ending on or Before

Filter by Mat. Status

Filter by Sections

Filter by Ad Types

Filter by Controllers

Refresh S

Change Artwork Status

Change Artwork Production Status to

Artwork Assigned - Not Started

Artwork in Process

Artwork Awaiting Feedback/Info

Completed

Change Artwork Status Go

Campaign	Line No.	Advertiser	Brand	Primary Contact	Columns	Width in Inches	Height in Inches	Preview of Final	Campaign Description
S296	15817.1	Arts Society	Merge music		20,000	8,000	11,000		
S293	15725.1	Super Tutor	College Apps Tutoring	Oscar K. Madison	20,000	8,000	11,000		

Check the box for the order and select “Change Artwork Production Status”. The pop-up screen displays the options for status, and you can choose the new status.

Refresh the screen and you can also select “Configure Output” to display the artwork production status. Choose the field “Artwork Production Status”.

The screenshot shows the 'Configure Output' interface. At the top, there's a navigation bar with options like 'Home', 'Sales Activity', 'Product/Group Analysis', etc. Below this, a 'Refresh Screen w/ Filters' button is visible. The main area is titled 'Selected Campaign Lines' and 'Configure Output'. It features a table with columns: Campaign, Line No., Advertiser, Brand, Primary Contact, Columns, Width in Inches, Height in Inches, Preview of Final, Campaign Description, and Artwork Production Status. A red arrow points to a 'Change Artwork Status' button in the top right. Below the table, there are sections for 'Production Notes' and 'Materials'.

Save the configuration and the field then displays the new status for this campaign.

Foreign Currency Field in Create Account from Campaign

The currency field is added to the abbreviated customer creation screen from campaign entry.

Navigate to create a new campaign, and then click the + by the Advertiser field.

The screenshot shows the 'NEW CAMPAIGN' screen with the 'NEW ADVERTISER' pop-up window open. The 'Billing Currency' field is highlighted with a red arrow. The pop-up window contains fields for Company Name, Account Name, Client Type, Agency ID, Agency Name, and various contact information fields. The 'Billing Currency' dropdown menu is open, showing options like CANADIAN \$, DO NOT USE, EUROS, FRENCH FRANC, POLISH ZLOTY, Pounds sterling, STERLING, Shirley's currency, UAE Dirhams, US DOLLARS (INACTIVE), and YEN.

Note the Billing Currency field is available to choose from and apply to the account and the campaign.

Bulk Status Change Report Date Range

Bulk Update Campaign Status Report has a date range search criteria instead of previously one date only.

Navigate to the menu Campaigns -> Bulk Update Campaign Status.

BULK UPDATE CAMPAIGN STATUS

Product Group from Campaign: Shirley's Nature Groups (SHNA) | Sales Rep: High Shirley | Status Codes: Confirmed-Ready to Bill (CO), Quote 1 - Early Pipeline (26%) (Q1), Quote 2 - Proposal sent (49%) (Q2) | Campaigns Running on or After: 4/1/2022 | Campaigns Running on or Before: 4/1/2022 | Get Data

Campaigns | Configure Output

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

ID	Advertiser ID	Advertiser	Brand	Start Date	End Date	Rep	Net Amount	Current Status	Credit Controller	Client Balance	Campaign Balance	Cash on Account	Tax Amount	Total with Tax	New Status
B433	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B434	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B435	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B436	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B437	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B438	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	
B439	244529	Arts Society	Paintings	4/1/2022	4/30/2022	Shirley High	0.00	Quote 3 - Negotiating (76%)	Shirley High	231,548.87	0.00	1,779.60	0.00	0.00	

Choose the criteria including the “Campaign Running on or after” date and “Campaign Running on or Before” date. The campaigns running before or on or after or on the date specified display. Note that the date is also not required to display data.

Campaign Approval Scope and User Selection

Approval Scope of a Campaign can be selected, and users chosen to be assigned to perform the confirmation based on the discount percentages allowed.

Navigate to the menu Setup -> Admin -> Group Security -> Advertising Security. Check the box “Proposals Require Approval by Manager Before Sending.

Discounting & Campaign Approvals

ALLOWABLE DISCOUNTS & CAMPAIGN APPROVALS [TOP](#)

1 **PROPOSALS REQUIRE APPROVAL BY MANAGER BEFORE SENDING**

☒ Yes

When setting up an advertising salesrep ID one can set one or more approvers on the ID. If campaigns require approval, the approver will be emailed and campaign can only be sent to customer/moved to approved status after approval.

Navigate to the menu Setup -> Salesrep setup -> Salesrep Maintenance. In the section “Alert via Email when Campaign Approval is Required”, choose a user name from the drop-down by checking the name(s) you’d like to perform the approval. The recipient of the approval request by default is the first name on the list in the Salesrep Maintenance screen described below under the section titled “Alert via

Email when Campaign Approval is Required”. This is regardless of the discount percentage limit listed for this recipient to approve.

These names are the user IDs within the system.

Alert via Email when Campaign Approval is Required		
Discounts up to Percent	Notify the Following via Email	
25.00		
50.00		
100.00		
Add 1 New Line	☐ Wayne Burrows (WBURROWS) ☐ Shirley High (SHIGH) ☐ Pureza Monticlan (PM2020) ☐ Pamela Morales (PAM) ☐ Ray Phelan (RAY) ☐ Jeff Shine (JS) ☐ Kelly Smith (KSMITH)	
Commissions		

Navigate to the menu Setup -> User Security. Scroll to the section “Production Settings”. Check the flag “I Can Approve Campaigns”. When set to Yes, this allows the user to be linked as an approver on the Salesrep Maintenance screen.

Production Settings	
CC Self on Production Emails	☒ Yes
Production Controller	☒ Yes
I Can Approve Campaigns	☒ Yes
Campaign Approval Scope	I Can Approve for Anyone
Default Home Page	Executive Home Page & Navigation

The User must have an email address otherwise, the system will not know where to distribute the email notification. The email address can be added per user within the User Administration screen where you can add, edit and inactive users.

The next field “Campaign Approval Scope” in the User Security screen determines what the user can see and have access to when launching the Campaign Approval screen. Choose the level of approval to be one of the following:

- Approval for anyone.
- Approval for anyone in the same Security Group only.
- Approval for any Salesrep assigned to me only.

I Can Approve Campaigns	☒ Yes
Campaign Approval Scope	I Can Approve for Anyone I Can Only Approve Campaigns Assigned to Me I Can Approve Campaigns Assigned to Anyone in my Security Group I Can Approve for Anyone
Default Home Page	

Once this access is established, this will control the Approved Users who you will have access to and what campaigns you can approve.

Navigate to the menu Campaigns -> Campaign Approvals.

CAMPAIGNS PENDING APPROVAL

Select the approval user from the drop-down and the product group of the campaign.

Note that the system defaults all users to the **I Can Approve for Anyone** option as this was the current design of the Campaign Approval screen if one had access to it and would cause no disruption as to how it is currently designed.

Ratecard Import Advertiser and Advertiser*Brand Multiple Entries on One Line

Ratecard Import template allows for specifying Advertiser(s) ID and/or Advertiser ID*Brand ID multiple entries separated by commas. This applies to both Display and Classified Ratecards.

Navigate to the menu Setup -> Import/ Export Ratecards. Click the node Import Ratecards (Standard or Classified).

In the template, enter the information in the column “Client” for the Advertisers separated by commas and advertiser*brand also separated by commas for multiple entries.

	E	F	G	H	I	J	K	L	M	N
	Apply Frequency Discounts without Contract	Client Type	Client	Currency ID	Edition	Start Date	End Date	Color	Line Description	Allow Description Overr
1			256348*A1, 255544, 244539*A1			2/16/2022	2/26/2022		Cost Per Word	Y
2										
3										
4										
5										

For example: 244539*A1, 244534, 256554*Book

Continue to fill in the remaining template columns as needed and save the file. Select the file to upload it to Naviga. It’s always recommended that you click “Test Import File” to flush out all errors in the template before you import it. Then proceed with the import.

The file is imported and can be viewed in the menu Setup -> Product Setup -> Ratecards.

PRODUCT RATECARDS

Note that the field “Client” is now populated with these advertisers and their brands and will be available only for these clients in line item entries.

Engage Portal Lookup

Client Engage Portal for Salesreps allows for search on a client by brand.

Navigate to login as a Salesrep to the Portal.



My Customers

	Account Type	Customer	Address	City	State	Zip/Postal	Country	Phone
★ Advertiser		<u>Arts of New York</u> Account ID: 254911 Go to Website	<u>98 Artsy Road</u> <u>NEW YORK, NY 00002</u> <u>UNITED STATES</u>	NEW YORK	NY	00002	UNITED STATES	#####
★ Advertiser		<u>Bernard Shaw</u> Account ID: 254910 Go to Website	<u>8900 George Street</u> <u>First Floor</u> <u>Suite 100</u> <u>Tarrytown, NY 10591</u> <u>UNITED STATES</u>	Tarrytown	NY	10591	UNITED STATES	#####
		<u>Bernard Shaw</u>	<u>8900 George Street</u> <u>First Floor</u>					

Click the “?Look-up an Account”. Type the full or partial advertiser name, brand name or ID and the list displays a list of matches.

Ratecard Line Discount Schedules Exclude Maximum Discount in Security

The Ratecard rate including the discounts set on the Ratecard by a schedule or other means apply to the order disregarding the security setting of the maximum discount allowed on the user group.

Navigate to the menu Setup -> Admin -> Group security -> Maximum Discount field and set it to 1%.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

Group Security
 Security Group Setup
 Users in Group
 General / Company Security
 Name Security
 A/R Security
 A/P Security
 G/L Security
 Production Workflow
 Advertising Security
 Status Codes
 Reports
 Client Approval Requirements
Discounting & Campaign Approvals
 Campaign Header Security
 Campaign Line Item Security
 Campaign Billing Security
 Naviga Inventory
 Google Ad Manager Inventory
 Other Settings
 Exhibition Security
 Product Security
 CRM Security
 Royalties Security
 Copy Group Settings

1. NO
 When setting up an advertising salesrep ID one can set one or more approvers on the ID. If campaigns require approval, the approver will be emailed and campaign can only be sent to customer/moved to approved status after approval.

2. -- ONLY PROPOSALS OVER THIS VALUE REQUIRE APPROVAL
 Only email for approval if campaign value exceeds value in this field.

3. -- PROPOSALS MUST BE APPROVED IF THIS PERCENT DISCOUNT ON ANY LINE EXCEEDS
 Only email for approval if any one campaign line is discounted by more than this percentage off the ratecard rate.

4. -- PROPOSALS MUST BE APPROVED IF THIS AVERAGE DISCOUNT PERCENT IS EXCEEDED ON A CAMPAIGN
 Only email if the sum total of all campaign lines exceeds this discount percentage versus the sum total of all ratecard prices on the campaign.

5. MAXIMUM TOTAL PERCENT DISCOUNT
 1.00
 Regardless of approval settings, restricts maximum total discount user can enter per line. Note: leave blank to allow any discount, including the ability to enter negative lines. Also Note: This rule is overridden in a few scenarios. For example if a Campaign Default Discount (which can default from the Brand) is greater than the user's permissions here, the greater discount will be allowed on that campaign. Also if a Package uses Ratecards and Locked Pricing - and the resulting discount from the original ratecard rate exceeds this setting, but the discount from the Package override price is less than or equal to this setting, it will be allowed.

6. AUTO ADJUST OVER APPLIED INCENTIVES
☒ Yes
 When updating or deleting lines, this option will insure that applied incentives still qualify - and if not will remove them. Note: This cannot remove applied incentives to billed orders.

7. AUTO ADJUST OVER APPLIED INCENTIVES - ONLY FOR THESE SELECTED STATUS CODES
 Leave blank for ALL.

Campaign Header Security

Save the settings.

Navigate to the menu Setup -> Product Setup -> Ratecard and choose the product and the Ratecard. Choose a discount schedule which is preset in the menu Setup -> Advertising Setup -> Frequency Discount Schedule. Save the Ratecard.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

PRODUCT RATECARDS

Product Setup
 PRODUCT GROUP SETUP
 PRODUCT SETUP
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 GL Overrides Import
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 PRICING RULES
Ratecards
 Price Adjustments
 Auto Adjustments
 SECTIONS & POSITIONS
 Sections
 Sections Import
 Positions
 Inventory by Position
 Positions Import
 Copy Sections/Positions
 ISSUE-BASED SETUP
 Published Dates
 Issue Configuration
 Issue Import

Ratecards
 Product: Astronomy Magazine
 Ratecard Type: Print Rates
 Client Type:
 Start Date: Tuesday, February 1, 2022
 End Date: Saturday, December 31, 2022
 Selection Type: Only Active and Future Ratecards
 Client(s):
 Category Tree:
 Currency:
 Edition:
 Ratecard ID: 275 New
 Ratecard Description: Print 2022
 Default Frequency Rate Discount Schedule: Commercial Rate Breaks
 Preview Frequency Discount Schedule
 Apply Frequency Discounts without Contract: ☒ Yes
 Only Allow this Ratecard on Packages: ☐ No

New Line View Change History Create from Size Table Copy lines from another ratecard Sort by Description

ID	Size	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns	Inches or Centimeters or Agate Lines	Production Link	External ID	Rate	Inactive	No Tax	
1214			1 Page	No	420,000			Display Advertising	Print Display		0.00	0.00			400.00000	No	No	View Line Change History

Navigate to create a campaign for this product and apply the conditions to satisfy the discount, such as 10% discount for a 3 issue frequency in the same order.

Line Details

Product: Astronomy Magazine
 Ad Type: Display Advertising
 Contract:
 Edition(s):
 Ratecard: Print 2022
 Ratecard Line ID: 1214
 Description: 1 Page
 Lines / Page Eq: 420 / 1,000

Pricing per Issue

Ratecard Flat Fee: 400.00000
 Adjustments: -40.00000
 Adjusted Flat Fee: 360.00000
 Total Amount: 1,800.00
 Estimated Tax: 360.00
 Estimated Total: 2,160.00

ID	Description	Gross/Net	Qty	Amount	Percent	Total Amount
	Frequency Break: 3x Discount	Gross	1	-40.00000	-10.00000 %	-40.00000

The system allows you to create the line with the discount and doesn't alert or stop the line from being created.

Digital Line Start and End Time

Digital Lines on campaign entry screens include start time and end time fields for the ad to start and end.

Navigate to the create a new or edit a campaign and add a digital line item for a digital product.

NEW FLAT FEE LINE

Product: Blackfeet Nation
 Ad Type: Flat Rate
 Contract:
 Ratecard: SH2020-2021
 Ratecard Line ID: 677
 Description: FR

Pricing

Ratecard Flat Fee: 200.00
 Adjustments: -14.00000
 Adjusted Flat Fee: 186.00
 Allocated Amount: 186.00
 Estimated Tax: 9.30
 Estimated Total: 195.30

Line Details

Start: 3/1/2022 1:00 PM
 End: 3/30/2022 12:00 AM
 Total Days: 30
 Proportion Values: by Number of Days in Month

Time Picker

12:00 AM
 1:00 AM
 2:00 AM
 3:00 AM
 4:00 AM
 5:00 AM
 6:00 AM
 7:00 AM
 8:00 AM
 9:00 AM
 10:00 AM
 11:00 AM
 12:00 PM
 1:00 PM
 2:00 PM
 3:00 PM
 4:00 PM
 5:00 PM
 6:00 PM
 7:00 PM
 8:00 PM
 9:00 PM
 10:00 PM
 11:00 PM

Click the clock icon by the Start date and choose the time when the ad starts running and similarly choose the end time. Save the line.

Material Record Displays Order ID

Material ID records display the order and line IDs attached to them even if the material isn't attached to a particular issue in a multi-issue order.

Navigate to the menu Campaigns and create a new campaign for multiple issues on one line item.

Add a material to the line. Save the line.

Navigate to the menu Production -> Materials by Advertiser. Search by the advertiser in the campaign above.

The screenshot shows the 'MATERIAL ADD/UPDATE' form. The 'Orders Using this Material' tab is selected, displaying a table of orders. A purple arrow points to the 'Orders Using this Material' tab header.

ID	Publication	Issue	Issue Date	Brand	Size	Mat. St.	Order St.	Position
18471.1	Astronomy	14163	Monday, March 7, 2022	Artifacts	1 Page		CO	Anywhere
18471.2	Astronomy	14166	Monday, March 14, 2022	Artifacts	1 Page		CO	Anywhere
18471.3	Astronomy	14170	Wednesday, March 23, 2022	Artifacts	1 Page		CO	Anywhere
18471.4	Astronomy	14181	Monday, April 18, 2022	Artifacts	1 Page		CO	Anywhere

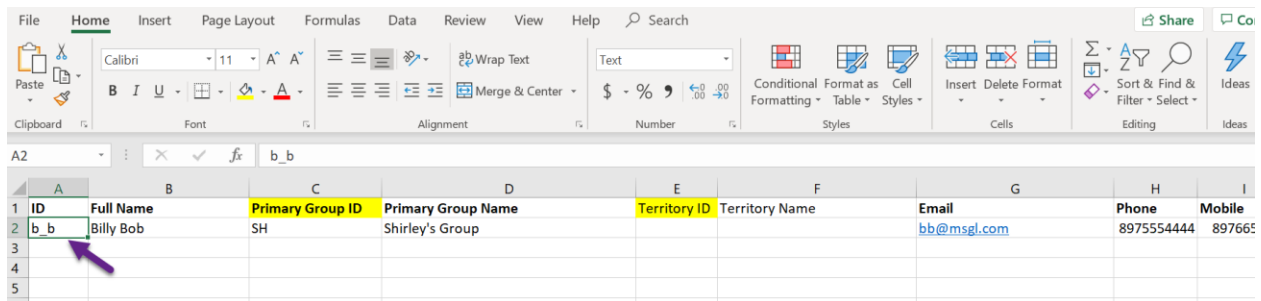
Click the link to that material and note "Orders Using this Material" tab contains the orders and lines where the material has been added to the campaigns.

Salesrep Import Limitations

Salesrep Import template doesn't allow special characters and on import, the system removes them and also converts all lower case letters in the Rep ID to upper case.

Navigate to the menu Setup -> Salesrep Setup -> Import Salesrep.

Download the template and enter the rep ID to be lower case and special characters. Fill in the remaining data.

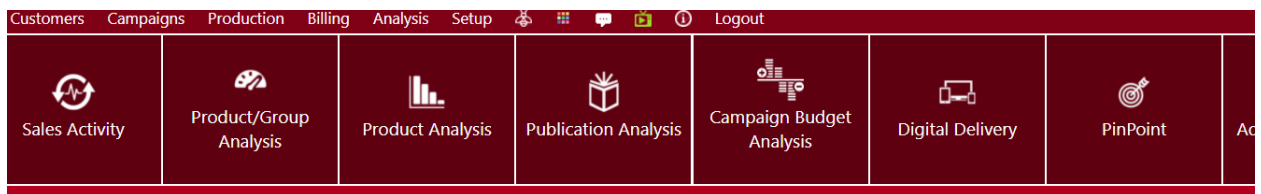


	A	B	C	D	E	F	G	H	I
1	ID	Full Name	Primary Group ID	Primary Group Name	Territory ID	Territory Name	Email	Phone	Mobile
2	b_b	Billy Bob	SH	Shirley's Group			bb@msgl.com	8975554444	897665
3									
4									
5									

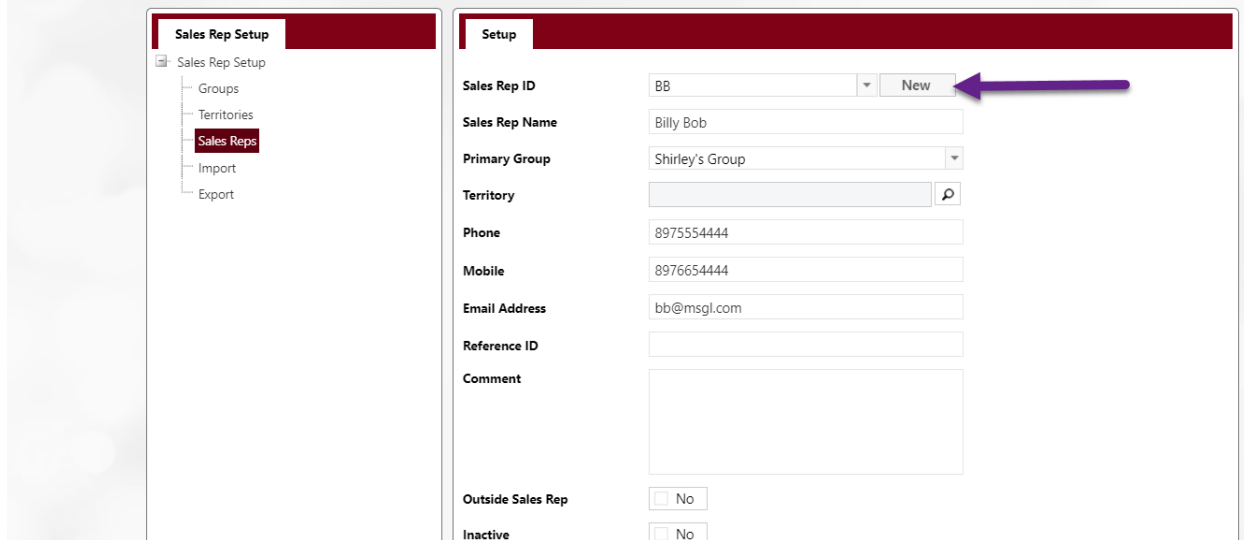
Save the template.

Browse to choose the template and click Import File.

The system imports successfully. Click the Salesrep node.



SALES REP MAINTENANCE



Sales Rep Setup

- Sales Rep Setup
 - Groups
 - Territories
 - Sales Reps**
 - Import
 - Export

Setup

Sales Rep ID: BB New
Sales Rep Name: Billy Bob
Primary Group: Shirley's Group
Territory:
Phone: 8975554444
Mobile: 8976654444
Email Address: bb@msgl.com
Reference ID:
Comment:
Outside Sales Rep: ☐ No
Inactive: ☐ No

The system changes the Salesrep ID to all upper case and no special characters.

Ready to Sign Flag on Confirmation

On generating a confirmation email for a campaign after a quick line entry, there's a flag to mark the campaign as "Ready to Sign" which you can check. The field allows user's advertiser to view the campaign on the portal and sign it.

Navigate to create a new campaign and use the quick line entry to enter the line item.

The system prompts you to generate a proposal. Click Yes.

Note the flag “Ready for Signatures”. Check the flag if you’d like your advertiser to see this campaign on the portal and sign it for approval.

Your advertiser can now view and approve this proposal on the portal.

Frequency Discount Day of the Week Filter

Incentive Setup based on frequency includes a filter on matching day of the week as a qualifier and where the incentive is applied. This only applies to line items where all issue dates match the selected day(s) of week set in the application.

Navigate to the menu Setup -> Advertising setup -> Incentive Setup -> Frequency Incentive.

The screenshot shows the 'Incentives Setup' interface. On the left is a navigation tree with 'Multi-Product Incentives' expanded, showing sub-sections like 'Basic Settings', 'Notes', 'Qualifiers', 'Discount Rules', and 'Application Rules'. The 'Qualifiers' section is selected. The main content area displays a list of products: 'Farm Journal Magazine (FJ)', 'farmers (FA)', 'Keraza Newsletter (PK)', 'Migrating Birds (MB)', 'Mystery Stories (MS)', 'No Section (NOSEC)', 'No sections (NS)', 'Parks and Recreation (PR21)', 'Police Website (PO)', 'Run of Network (SRON)', 'SH- Baked Goods (BG)', 'SH University Pub (SHU)', and 'SH University Pub 2 (SHU2)'. Below this list, the 'MATCHING DAY(S) OF WEEK' dropdown is set to 'Friday'. A purple arrow points to this dropdown. At the bottom, there is a section for 'Incentive Discount Rules' with a 'TOP' link.

Setup the frequency to be any number with the respective discount percentage. For example, frequency of 2 with a 5% discount and 3 with a 10% discount.

Scroll to the Qualifiers section and choose from the drop-down the day(s) of the week you'd like the frequency above to match. For example, the two issues must fall on these days of the week to meet the discount set. If the line item has two issues which both fall on this day, then the qualifying condition is met.

Scroll to the section of the Application Rules and in the field "Apply to Days of Week" select all days in the order on which the issues fall.

The screenshot shows the 'Incentives Setup' interface, specifically the 'Application Rules' section. The left navigation tree has 'Application Rules' selected. The main content area shows a list of products: 'Darwin Origin of Species (DRW)', 'Farm Journal Magazine (FJ)', 'farmers (FA)', 'Keraza Newsletter (PK)', 'Migrating Birds (MB)', 'Mystery Stories (MS)', 'No Section (NOSEC)', 'No sections (NS)', 'Parks and Recreation (PR21)', 'Police Website (PO)', 'Run of Network (SRON)', 'SH- Baked Goods (BG)', 'SH University Pub (SHU)', and 'SH University Pub 2 (SHU2)'. Below this list, the 'APPLY TO DAY(S) OF WEEK' dropdown is set to 'Tuesday, Friday'. A purple arrow points to this dropdown. Below the dropdown, there is a text field with the placeholder 'This application rule, when set, will only apply to line items where all issue dates match the selected day(s) of week set here.' At the bottom right, there are 'Reset' and 'Save' buttons.

This field rule only applies to line items where all issue dates match the selected day(s) of week set here. Partial issues applying to the days will not allow this discount to apply to the order.

Save the incentive rule.

Navigate to the menu Campaigns -> Create New Campaign and enter line items to match the qualifying day(s) above and the number of issues to qualify for the frequency on those days.

EDITING FLAT FEE LINE: 18470

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

Product: SPCA Magazine | Size: 1/2 Page (4x5.5) | Pricing per Issue

Ad Type: Display Advertising | G/L Type: Print Display | Ratecard Flat Fee: 400.00000

Contract: | Color: | Adjustments: 0.00000

Edition(s): | Section: Anywhere | Adjusted Flat Fee: 400.00000

Ratecard: Display | Position: Anywhere | Total for all Issues

Ratecard Line ID: 891 | Target Demographic: | Total Amount: 1,600.00

Description: Display | Estimated Tax: 0.00

Lines / Page Eq.: 420 / 1.000 | Estimated Total: 1,600.00

Line Details | Zones | Adjustments

Proportion Values: Evenly by Issue | Select Issue Date(s) to add: +

Day	Issue Date	Available	Billing Amount	Material	Material Status	Page No.	Invoice ID	Credit ID	Credit	Delete
Friday	1 April 2022	☒	400.00						☐	☒
Tuesday	5 April 2022	☒	400.00						☐	☒
Friday	8 April 2022	☒	400.00						☐	☒
Friday	22 April 2022	☒	400.00						☐	☒

If the frequency incentive package is for 3 issues to apply for the discount and the qualifier day is Friday, then the line items must be 3 issues all falling on a Friday. There can be more lines for issues on other days for example a Tuesday. Tuesday and Friday both must be the days chosen in the Incentive Setup above in the Application Rules” section.

Save the campaign. Then click the button “Check Incentives”.

INCENTIVES FOR CAMPAIGN 7807

Selected & Available Incentives **Achievable Incentives**

Qualifying Incentives are listed in the grid below. Use the line expand feature to view which line items on this campaign will receive the selected incentive.

Not seeing an Incentive you are expecting? [Click here to check a specific Incentive.](#)

	☒	Incentive Description	Incentive Type	Qualifiers	Qualifying Qty	Incentive Escalation Level	Qualifying Discount Percent	Qualifying Discount Amount	Next Incentive Level Discount Percent	Exclusive
	☒	SH-Frequency Gross	Insertion Frequency Discount Valid Through Tuesday, November 1, 2022 Priority Code	- Product Group = Nature Pubs and Digital (NATS) - Ad Type = Display Advertising (NR) - Product = SPCA Magazine (SPCA) - Format = Magazine (PUB)	3.00	2 - 3	-10.00%	-160.00	0.00%	☐

INCENTIVE DISCOUNT - APPLIES TO THESE LINES

Already Taken	Line ID	Product ID	Product	Ad Type ID	Ad Type	Amount	Incentive Already Applied %
☐	18470	SPCA	SPCA Magazine	NR	Display Advertising	1,600.00	0.00%
						1,600.00	

Cancel **Apply Selected Incentives**

Apply the incentive based on the setup above. If it doesn't match, then the system displays it in the Achievable Incentives and instructs you on how to qualify for the deal.

Pinpoint Analysis Drill Down

Pinpoint Analysis includes "Ad Type" as a Drill Down option.

Click the tile menu "Pinpoint Analysis".

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

PINPOINT ANALYSIS Advertising This year rev vs. last year rev Apply Templates

Initial Setup Data Navigator Security Minimize

Rep Selection First Level Analysis

Rep Selection	Product	Order Date	Order Date	Math Column	Math Column
Brand Rep(s)	Product	1/1/2022	1/1/2021	Start Date	Start Date
		12/31/2022	12/31/2021	End Date	End Date
		Entered Before	Entered Before	Entered Before	Entered Before

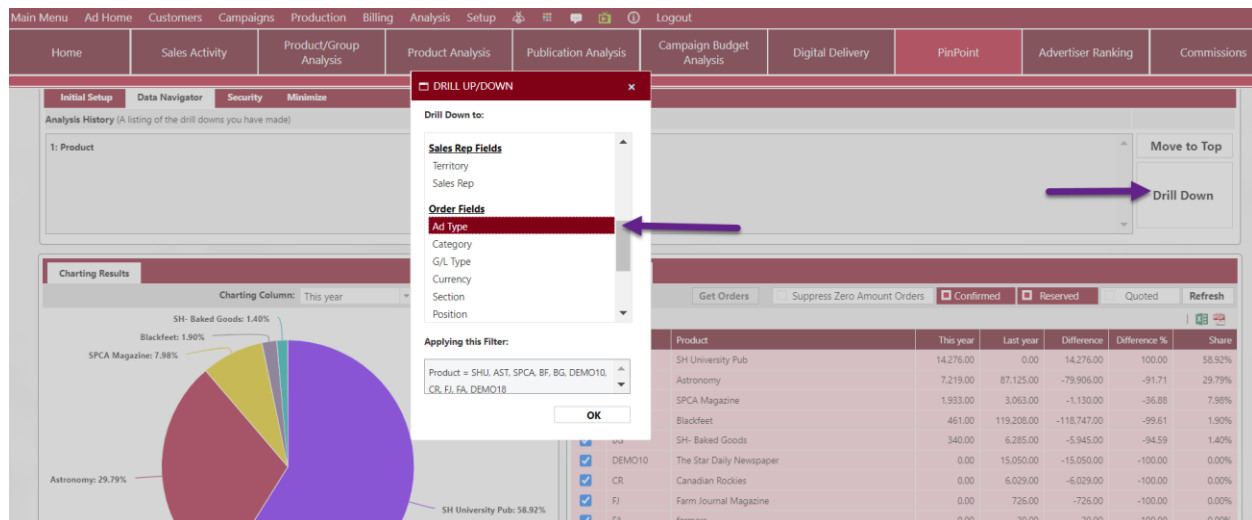
Get Data

Charting Results Charting Column: This year Pie Chart Values

Data Results Get Orders Suppress Zero Amount Orders Confirmed Reserved Quoted Refresh

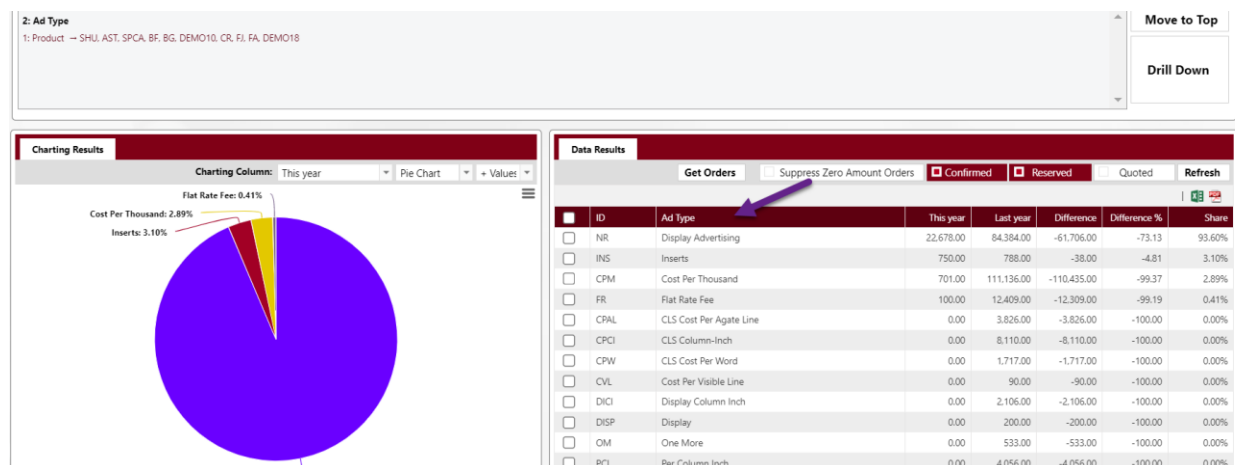
Choose the template from the drop-down menu, choose the search criteria and click "Get Data".

The data displays in graphical and numeric forms.



Check the rows you'd like to drill down into and click "Drill Down". The pop-up screen displays and when you scroll down, you'll see the field "Ad Type".

Choose "Ad Type" and click OK.



The data displays by Ad Type in graphic and numeric form displaying the AD Type in its own column.

Color in Orders by Product Report

New configurable field "color" description is available to Orders by Product report.

Navigate to the menu Campaigns -> Orders by Product. Scroll to the tab "Configure Output".

Selected Campaign Lines **Configure Output**

ON SCREEN COLUMNS		EXCEL EXPORT COLUMNS	
Reset Configuration	Save Configuration	Reset Configuration	Save Configuration
Available Grid Columns Height in Centimeters Width in Millimeters Height in Millimeters External Campaign ID Campaign P.O. Number Status Description Ad Server Line ID Brand Agency ID Agency Industry Code Industry Name Line Start Line End Color Section ID Section Name Position ID Position Name	Selected Grid Columns Advertiser ID Product Line ID Campaign Type Description Sizes Status ID Advertiser Line Type Order Sales Rep(s) Rate Est. Qty Actual Qty Run until cancel Package Name Campaign Manager Columns Column Height	Available Export Columns Product ID Ad Type ID Ad Type Format ID Format Marketing Campaign ID Marketing Campaign Description Campaign Description Campaign Manager R.O.N. Ratecard ID Ratecard Line ID Width in Points Height in Points Width in Agates Height in Agates Columns Column Height Width in Inches	Selected Export Columns Product Line ID Campaign Type Description Sizes Status ID Brand Line Type Order Sales Rep(s) Rate Est. Qty Est. Gross Amount Est. Net Amount Actual Qty Actual Gross Amount Actual Net Amount Currency Page Eq.

Click the “Color” field and click the right facing arrow to move the field to the right side under Selected Grid Columns. Click Save Configuration.

Click the “Selected Campaigns Lines” and run the query.

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

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

Selected Campaign Lines **Configure Output**

☒ Confirmed ☐ Reserved ☐ Quoted Amounts in Local Currency

Page: 1 of 2 Go Page size: 50 Change

Advertiser ID	Product	Line ID	Campaign	Type	Description	Sizes	Status ID	Advertiser	Order Sales Rep(s)	Rate	Actual Qty	Columns	Color
255516	Blackfeet	15387	5126	Performance	CPM		CO	Minia Diocese	Shirley High	20.00000	0	0.000	
255516	Blackfeet	15388	5126	Performance	CPM		CO	Minia Diocese	Shirley High	20.00000	0	0.000	
255502	Blackfeet	15150	5012	Performance	1 Page	3:1 Small Billboard	CO	SUSCOPTS	Shirley High	200.00000	0	0.000	
255243	Blackfeet	15456	5163	Performance	CPM	3:1 Small Billboard	CO	Minnesota Twins	Shirley High	200.00000	0	0.000	
255073	Astronomy	15450	5157	Performance	1 Page	1 Page	CO	Super Tutor	Shirley High	770.00000	1	0.000	
255073	Astronomy	15451	5158	Performance	1 Page	1 Page	CO	Super Tutor	Shirley High	770.00000	1	0.000	
255243	Astronomy	15471	5170	Performance	1 Page	1 Page	CO	Minnesota Twins	Shirley High	770.00000	1	0.000	
255502	Astronomy	15149	5011	Performance	1 Page	1 Page	CO	SUSCOPTS	Shirley High	555.56000	1	0.000	Black & White
254396	SPCA Magazine	15189	5040	Performance	Display	1 Page	IS	Montana Tours	Shirley High, Sean Connery	332.50000	1	0.000	
255508	Astronomy	15556	5203	Performance	1 Page	1 Page	IS	University of Iowa	Shirley High	555.56000	1	0.000	Black & White
254396	Astronomy	15587	5040	Performance	Per Col Inch	2x3	IS	Montana Tours	Shirley High, Sean Connery	230.00000	6	2.000	Full Color
254396	SPCA Magazine	15190	5040	Performance	Display	1 Page	IS	Montana Tours	Shirley High, Sean Connery	332.50000	1	0.000	
255471	Blackfeet	15585	5212	Flexible	CPM	Medium Rectangle	IS	Coptic Church	Shirley High	200.00000	1,000	0.000	

The Color column displays in the results and displays values for orders with the Color values filled.

Product Group Ratecards

Ratecards are designed for Product Groups to cover Print, Digital and Classified AD Types.

Navigate to the menu Setup -> Product Group Setup -> Group Ratecards.

PRODUCT GROUP RATECARDS

Product Group Setup

- PRODUCT GROUP SETUP
 - Product Group Details
 - G/L Overrides
 - Email Notifications
 - Endemic Industry Codes
 - Fabsoft Invoice Forms
 - Group Sections
 - Group Positions
- PRICING RULES
 - Group Ratecards
 - Price Adjustments
 - Auto Adjustments
- PRODUCT SETUP
 - Product Listing
 - Product Details
 - Material Handling
 - Audience
 - Demographics
 - G/L Overrides
 - GL Overrides Import
 - Tax Overrides
- PRICING RULES

Ratecards

Product Group: Nature Pubs and Digital

Ratecard Type: Print Rates

Client Type: [Dropdown]

Start Date: Tuesday, March 1, 2022

End Date: Saturday, December 31, 2022

Selection Type: Only Active and Future Ratecards

Client(s): [Empty]

Category Tree: [Dropdown]

Currency: [Dropdown]

Edition: [Dropdown]

Ratecard ID: 224

New

Ratecard Description: Vanilla Group Display

Default Frequency Rate Discount Schedule: [Dropdown]

Preview Frequency Discount Schedule

Apply Frequency Discounts without Contract: [No]

Only Allow this Ratecard on Packages: [No]

New Line View Change History Create from Size Table Copy lines from another ratecard Sort by Description

ID	Size	Color	Line Desc.	Allow Description Override	Lines	Ad Type	G/L Type	Columns	Inches or Centimeters or Agate Lines	Production Link	External ID	Rate	Inactive	No Tax	
905	4x5.5 (11/2)		1/2 Page	No	210,000	New Display	New Print Display	0.00	0.00			333.00000	No	No	View Line Change

Click New and choose the Ratecard Type. Add the line similar to entering any product Ratecard. Save the Ratecard. Note that the “Only Allow this Ratecard on Packages” flag is ineffective at this point. Group Ratecards do not support packages.

Click the node “Price Adjustments” to add a price adjustments.

PRODUCT GROUP PRICE ADJUSTMENTS

Product Group Setup

- PRODUCT GROUP SETUP
 - Product Group Details
 - G/L Overrides
 - Email Notifications
 - Endemic Industry Codes
 - Fabsoft Invoice Forms
 - Group Sections
 - Group Positions
- PRICING RULES
 - Group Ratecards
 - Price Adjustments
 - Auto Adjustments
- PRODUCT SETUP
 - Product Listing
 - Product Details
 - Material Handling
 - Audience
 - Demographics
 - G/L Overrides
 - GL Overrides Import
 - Tax Overrides
- PRICING RULES

Surcharges and Discounts

Product Group: Nature Pubs and Digital

Apply Sort Add a New Line

Sort	Description	Allow Description Override	+/-	Type	Prompt for Value	Prompt for Qty	Value	Hide on Forms	Currency	Ad Type	G/L Type Code	Application Rule (used in Booking Wizard only)	Inactive	
1	Price Adjustments External ID	☒	-	Percent	☐	No	-5	☐		CLS Column-1		Apply to All Insertion	☐	☒
2	Price Adjustments External ID	☒	-	Percent	☐	No	-3	☐		CLS Cost Per 1		Apply to All Insertion	☐	☒

Enter the details on the line and save the price adjustments.

Click the node Auto Adjustments to tie the adjustment to be automatically applied with a Ratecard Line.

Save the settings.

Navigate to create a new campaign and note in the Ratecard Line the Product Group Ratecard displays as an option.

When creating the line, the adjustments are auto-applied.

Same applies to the Classified and the Digital Ad Types.

Group Sections and Positions

You can create sections and positions or positions without being tied to sections. This is helpful if you have the same positions and sections across all products. You can also tie this section and position setup individually to correspond to section/ position in individual products.

Navigate to the node “Group Sections” and search for the product group. Choose either independent positions of sections or positions within sections.

Add ID and description in the first new line. At this point, you can also edit the line using the pencil edit to connect this section to a product section.

Choose the section and save. Now this product section is connected to the product(s) sections. Save the settings.

Repeat for the node Group Sections.

Create a display line item on a campaign using the Booking Wizard.

The screenshot shows the 'BOOKING WIZARD' interface. The 'Product Selection' tab is active. The 'Start Date' is set to 'Friday, April 1, 2022'. The 'Print Rate Line' is '1/2 Page (925)'. The 'Digital Rate Line' is empty. The 'Select Product(s)' dropdown is set to 'Astronomy'. The 'Group Section' dropdown is set to 'Main 1' and the 'Group Position' dropdown is set to 'Position 1'. A table below shows a product line item for 'Astronomy' with a rate of 421.80. A purple arrow points to the 'Group Section' dropdown.

Product	Issue / Run Dates	Delete
Astronomy	4/2/2022 Multi-Select	

Note that you can choose the Group Section and Position. Save the line.

Also note that in the Category Template now includes “Group Pricing” where you can include the Ratecard from the Group.

Navigate to the menu Setup -> Classified Order setup -> Classified Templates.

The screenshot shows the 'CLASSIFIED TEMPLATES' interface. The 'Category Tree Setup' tab is active. The 'Group Pricing' tab is selected, showing a table with columns for Template HTML, Sample Metadata Values, Sample Image, Group Pricing, Product Pricing, and Clients. A purple arrow points to the 'Group Pricing' column header.

Template HTML	Sample Metadata Values	Sample Image	Group Pricing	Product Pricing	Clients
Ratecard Type	Group			Ratecard	Rate Line
Listing / Liner Rates	Nature Pubs and Digital NATS			Group Package Listing (229)	Cost Per Word (937)

Choose a Category Tree and Template and note the tab “Group Pricing”. Choose the type, group, and Ratecard and remaining details. Save the details. This can be used in addition to the Product Pricing. So, the campaign which fits these conditions will show pricing from both tabs.

Once you save, then navigate to a campaign and create a line using this category template. IF the product is included in that Product Group for which you created the group pricing, then it displays as a product to create a line item using this package.

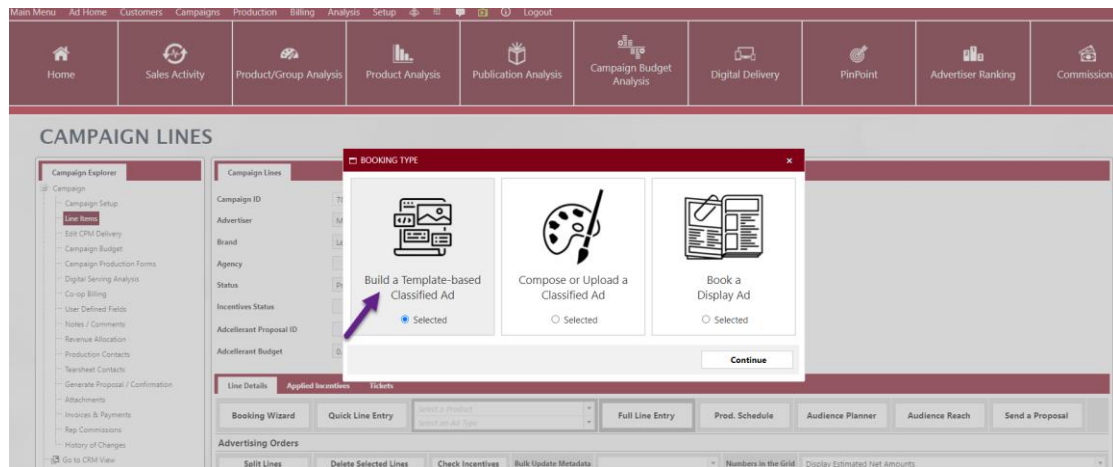
In the Ratecard field the group Ratecard from the category tree displays. Choose it and proceed to finish the line.

Booking Wizard

Booking Wizard order entry method is added to allow for bulk entry across multiple products for classified, print and digital products using existing methods and Product Group Ratecards. Users are allowed to edit the lines created as a package where every change affects the set of lines created using this method, to facilitate editing the Ad across all products chosen using this method of order entry. These options also display in the menu My Orders - Quick Entry for New Classified Package Order.

I. Template Based Classified AD

In Campaign Line Entry screen, click the “Booking Wizard” icon and then choose “Build a Template-Based Classified AD”.



Click Continue.

The Classified AD pop-up screen displays from which you can use the Start Date of the AD, the category tree, category, package or product. Choose the dates you wish to include.

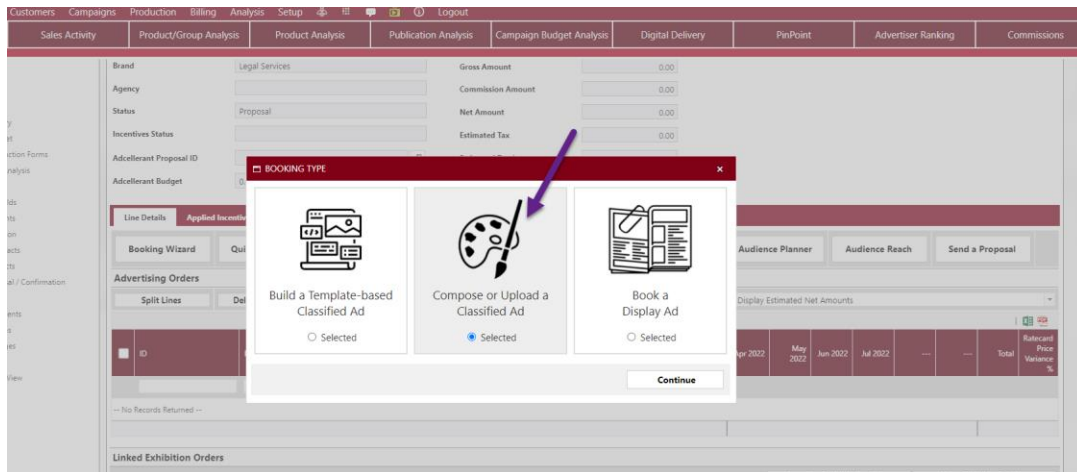
Product	Issue / Run Dates	Layout
The Star Daily Newspaper DEMO10	Friday, April 1, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Saturday, April 2, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Sunday, April 3, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Monday, April 4, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Tuesday, April 5, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Wednesday, April 6, 2022	6 Column ecol
The Star Daily Newspaper DEMO10	Thursday, April 7, 2022	6 Column ecol

Proceed clicking the Next button through the screens till the Book & Pay button.

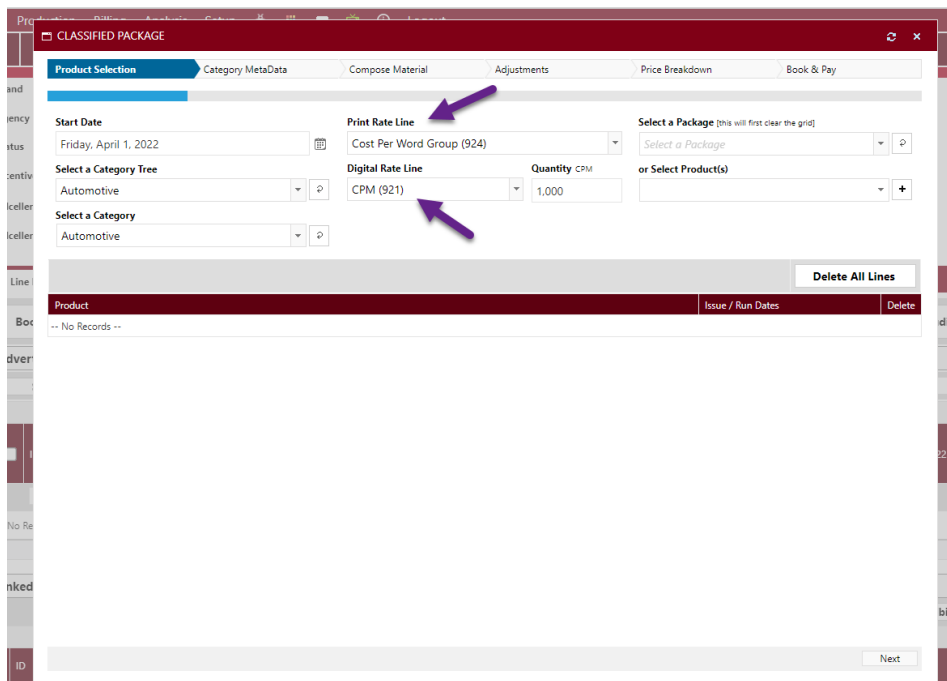
II. Compose or Upload a Classified AD

This option allows for Product Group Ratecard Options created as per the section in this document titled “Product Group Ratecards” above.

Click “Booking Wizard” and choose the second option “Compose or Upload a Classified AD” then click “Continue”.



The pop-up screen for the Classified Ad displays.



You can choose a category tree or not. Choose the Print Rate Line and/ or Digital Rate Line from the drop-down buttons.

If you're entering a digital rateline, which is CPM, you can enter the quantity in the Quantity field. If the print is a column-inch then the Column and Inch fields display to enter data in them.

You have the choice of a package if applicable. And proceed to finish the entry.

You can choose an option of the adjustment for the product or for the group.

Choose one or both as applicable and then click the + sign and enter the data.

You can also click “Check Incentives” and apply existing incentives.

Once you reach the final tab, you can check the “Take Payment” or uncheck it. If you check it, the system displays the payment screen where you can process the check or credit card payment.

The result is multiple lines filled in with details of the order across multiple products.

III. Book a Display AD

This option allows you to book a display ad across multiple products in bulk. Click this option from the Booking Wizard.

The pop-up screen allows you to enter the date, the Product Group Rateline for both print and digital as well as selecting multiple products using the checkboxes.

The cross product buy pop up screen allows you to enter the specific day filter where you can choose particular days to run the ad or leave blank to include all days. It also allows you to enter Issue Count for the number of issues to place the ad for all print products. Also, you can enter the duration of the months for the ad to run in the digital products. Click Apply. Proceed by clicking Next to go through the remaining screens and the system displays the price.

Note that in every case above, the system lists the Line ID as well as the Line Group ID.

Campaign Setup

Line Items

Edit CPM Delivery

Campaign Budget

Campaign Production Forms

Digital Serving Analysis

Co-op Billing

User Defined Fields

Notes / Comments

Revenue Allocation

Production Contacts

Tearsheet Contacts

Generate Proposal / Confirmation

Attachments

Invoices & Payments

Rep Commissions

History of Changes

Go to CRM View

Go to Advertiser View

Agency

Confirmed-Ready to Bill

Incentives Status

Advertiser Product ID

Advertiser Budget

0.00

Commission Amount

0.00

Net Amount

646.88

Estimated Tax

5.00

Estimated Total

651.88

Currency

Local Currency

Line Details

Applied Incentives

Tickets

Booking Wizard

Quick Line Entry

Select a Product

Select an Ad Type

Full Line Entry

Prod. Schedule

Audience Planner

Audience Reach

Send a Confirmation

Advertising Orders

Split Lines

Delete Selected Lines

Check Incentives

Bulk Update Metadata

Numbers in the Grid

Display Estimated Net Amounts

	Line Group	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Total	Ratecard Price Variance %
☐	1	25203	Astronomy Magazine	Listing	RTST	4/4/2022	4/4/2022	246.88	---	---	---	---	---	246.88	0.00%
☐	2	25204	Astronomy Magazine	Listing	RIST	4/4/2022	4/11/2022	300.00	---	---	---	---	---	300.00	0.00%
☐	3	25205	Blackfeet Nation	CPM	CPM	4/1/2022	4/30/2022	100.00	---	---	---	---	---	100.00	0.00%
								646.88						646.88	

Linked Exhibition Orders

The hyperlink to the Line ID or the Line Group ID displays the same set of lines.

BOOKING WIZARD

Product Selection | Category MetaData | Compose Material | Adjustments | Price Breakdown | Book & Pay

Start Date: Friday, April 1, 2022

Select a Category Tree: Automobiles

Select a Category: Automobiles

Print Rate Line: Listing (1218)

Digital Rate Line: CPM (1215) Quantity CPM: 1

Select a Package: Select a Package

or Select Product(s):

Delete All Lines

Product	Issue / Run Dates	Delete
Astronomy Magazine WP	Monday, April 4, 2022 Multi-Select	✖
Astronomy Magazine WP	Thursday, April 7, 2022 Multi-Select	✖
Astronomy Magazine WP	Monday, April 11, 2022 Multi-Select	✖
Blackfeet Nation WP	Friday, April 1, 2022 Saturday, April 30, 2022	✖

Even though the products maybe listed on separate lines, clicking the Line ID or the Group Line ID opens up the screen to allow editing all lines in this booking wizard set of line items.

Note that if there are any incentives applied to the lines, and you delete one of the lines in the set, the incentives are automatically removed and must be re-applied.

Navigate to the menu Campaigns -> My orders Quick Entry. Choose the option for “New Classified Package Order.”

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

Home | Sales Activity | Product/Group Analysis | Product Analysis | Digital Delivery | PinPoint | Advertiser Ranking | Commissions

ORDERS I ENTERED

Start Date: 3/8/2022 End Date: 3/8/2022 Refresh Data New Single Line

Selected Campaigns Configure Output

About This Report
This screen display order lines that you have entered today, or for whatever date range you select.

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

Entry Date	Product	Line ID	Campaign	Type	Description	Size	Campaign Status	Advertiser	Buyer
3/8/2022	SH University Pub	18502	7826	Performance	1 Page	1 Page	Q1	Morton Construction	Res Hor

QUICK CAMPAIGN ENTRY

CAMPAIGN DESCRIPTION: test package

ADVERTISER ID: 255508 ADVERTISER NAME: University of Iowa

BRAND: Books

AGENCY NAME:

CONTACT: Ingi Atef

ORDER STATUS: Reserved 1 - not sent to GAM

GROUP: Nature Pubs and Digital

PRODUCTION CONTROLLER: Shirley High

BOOKING TYPE: Build a Template-based Classified Ad

Build a Template-based Classified Ad

Compose an Ad-hoc Classified Ad

Book a Print Ad w/ Materials on-hand or to-come

Create Campaign

Est. Qty	Est. Gross Amount	Est. Net Amount	Qty Served	Actual Qty	Actual Gross Amount	Actual Net Amount	Tax Amount	Total with Tax	Currency
1	777.00	777.00	0	1	777.00	777.00	0.00	777.00	
1	777.00	777.00	0	1	777.00	777.00	0.00	777.00	

NAVIGATOR 2022.2 Build 202308.0246 ACCOUNT: DIGITAL20222 YOU ARE LOGGED IN AS: Shirley High (shigh) SECURITY GROUP: ROOT LANGUAGE: English (en-US) (Browser Default) © 2022 THARFA All Rights Reserved

You can then choose any of the options above.

AD Production Campaign Description

The AD Production screen displays the campaign description field for campaigns.

Navigate to the Customer Overview screen for a customer and click the AD Production tab.

COPTIC CHURCH COMPANY / ADVERTISER

Sales CRM **Ad Production** Accounting Exhibition Sales Newsstand Sales Quick Account Search

Upcoming Campaigns

Campaign ID	Campaign Description	Line No.	Brand	Agency	Size Description	Campaign Status	Product	Start	End	Section	Position	Material Status	Material
7728	production test	18276	Festivals		1 Page	CO	Astronomy	4/2/2022	4/2/2022	Anywhere	Anywhere		3102
7728	production test	18280	Festivals		1 Page	CO	Astronomy	4/6/2022	4/6/2022	Anywhere	Anywhere		3102
7777		18396	Liturgic Announcements		FF	R1	SH- Baked Goods	12/7/2022	12/7/2022	Center	Cupcakes		

The Campaign Description field is populated with the description of the campaigns from the campaign header.

Suppress Email on Completion Artwork Stage

The artwork stages screen has a new flag which allows for suppression of emails sending upon completion of the stage.

Navigate to the menu Setup -> Artwork Workflow Setup -> Artwork Production Workflow Setup.

ARTWORK PRODUCTION WORKFLOW SETUP
FOR DATE-BASED AND ISSUE-BASED PRODUCTS

Artwork Production Workflow Setup

These stages are used to manage Artwork Production associated with Date-Based and Issue-Based products, like newspapers, magazines, etc.

Apply Sort

Sort	ID	Description	Completed	Suppress Emails	Hidden from Artist's InDesign Queue	Line Color	
1	NOTSTARTED	Artwork Assigned - Not Started	☐	☐	☐		✖
2	INPROCESS	Artwork in Process	☐	☐	☐		✖
3	FEEDBACK	Artwork Awaiting Feedback/Info	☒	☒	☐		✖
4	DONE	Completed	☒	☐	☐		✖
CODE	Enter a New Stage Description		☐	☐	☐		+

Cancel Save

In the stages once you check the box for "Completed", the "Suppress Emails" box is enabled, and you can check it to suppress emails sent by the system once the stage is completed. These emails alert the next person in line waiting for this stage to be finished.

Salesrep Commission Reversal

Salesrep can be changed on a billed performance campaign or confirmed and or billed flexible campaign which will create a reversal of commission in the current period for the original period and a new commission record for the new Salesrep in the billing period. These records are reflected on the Commissions report for each Salesrep.

This change of Salesrep can be done from the Campaign header or from the line item on an individual line.

Create a campaign with line items and the Salesrep defined in the “Other Information” tab on the campaign header.

Bill the campaign from the Billing menu to a future period other than the current period.

View commission for a billed performance campaign, where the sales rep is on the campaign header:

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

REP COMMISSION SUMMARY

Start Period2022-06End Period2022-06Select Data

Ad Sales	Ad Adjustments	Ad Net	Exhibition Sales	Exhibition Adjustments	Exhibition Net	Total
1,724	0	1,724	0	0	0	1,724

Rep Commission Summary

Sales Rep:

Sales Rep	Product	Format	Reference ID	Commission Percent	Ad Sales	Ad Adjustments	Ad Net	Exhibition Sales	Exhibition Adjustments	Exhibition Net	Total
Sales Rep: Shirley High											
Shirley High	Astronomy Magazine	Magazine		3.00	899.00	0.00	899.00	0.00	0.00	0.00	899.00
Shirley High	Blackfeet Nation	Website		3.00	725.32	0.00	725.32	0.00	0.00	0.00	725.32
Shirley High	SH- Baked Goods	E-Newsletter		3.00	100.00	0.00	100.00	0.00	0.00	0.00	100.00
					1,724.32	0.00	1,724.32	0.00	0.00	0.00	1,724.32
					1,724.32	0.00	1,724.32	0.00	0.00	0.00	1,724.32

The commission is all dedicated to this Salesrep on the campaign.

Change the Salesrep on the campaign from the Campaign header drop-down menu. Apply this to all lines on the campaign.

CHANGE ORDER REPS

Changing Sales Rep Assignments
 This process allows you to change the Rep Assignment Defaults on this Campaign, which will affect new lines entered, as well as apply these changes to qualifying lines that already exist on this campaign.
 First you must set the new Rep Assignments below, then be sure to select the line items you would like to apply this change to.

New Rep Assignments			Current Rep Assignments		
ID	Name	Commission Percent	ID	Name	Commission Percent
Z1	Zelda Schmidt	100	SHIGH	Shirley High	100.00
					100.00
		100.00			

Line Item Selection

ID	Product	Description	Ad Type	Start Date	End Date	Order Reps	Match	
25629	SH- Baked Goods Section: Center Position: Cupcakes	Flat Fee	FR	6/1/2022	6/1/2022	Shirley High	100.00%	Campaign Default
								☒

Cancel Save Changes

The campaign automatically shows the reversal of commission for the original Salesrep and a commission record for the new Salesrep in the Rep Commissions node.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

CAMPAIGN REP. COMMISSIONS

Campaign Explorer

- Campaign
- Campaign Setup
- Line Items
- Edit CPM Delivery
- Campaign Budget
- Campaign Production Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts
- Tearsheet Contacts
- Generate Proposal / Confirmation
- Attachments
- Invoices & Payments
- Rep Commissions**
- History of Changes
- Go to CRM View
- Go to Advertiser View

Rep Commissions

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

ID	Line ID	Description	Line Start	Line End	Period	Rep ID	Rep Name	Other Reps	Percent	Amount	Invoice	Processed
15845	25629	Flat Fee	6/1/2022	6/1/2022	2022-03	Z1	Zelda Schmidt		100.00	100.00	SH1518294T	☐
R15844	25629	Flat Fee	6/1/2022	6/1/2022	2022-03	SHIGH	Shirley High		-100.00	-100.00	SH1518294T	☐
15844	25629	Flat Fee	6/1/2022	6/1/2022	2022-06	SHIGH	Shirley High		100.00	100.00	SH1518294T	☐
										100.00		

Click the menu tile “Commissions” and note that the system automatically shows the Reversal record of commissions for the original Salesrep attached to the current period when the reversal took place and **not** in the future billed period:

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

Pinpoint

Advertiser Ranking

Commission

REP COMMISSION SUMMARY

Start Period2022-03End Period2022-03Select Data

Ad Sales	Ad Adjustments	Ad Net	Exhibition Sales	Exhibition Adjustments	Exhibition Net	Total
7,051	-100	6,951	0	0	0	6,951

Rep Commission Summary

Sales Rep - X

Sales Rep	Product	Format	Reference ID	Commission Percent	Ad Sales	Ad Adjustments	Ad Net	Exhibition Sales	Exhibition Adjustments	Exhibition Net	Total
Sales Rep: Shirley High											
Shirley High	Astronomy Magazine	Magazine		3.00	5,452.00	0.00	5,452.00	0.00	0.00	0.00	5,452.00
Shirley High	Blackfeet Nation	Website		3.00	1,598.98	0.00	1,598.98	0.00	0.00	0.00	1,598.98
Shirley High	SH- Baked Goods	E-newsletter		3.00	0.00	-100.00	-100.00	0.00	0.00	0.00	-100.00
					7,050.98	-100.00	6,950.98	0.00	0.00	0.00	6,950.98
					7,050.98	-100.00	6,950.98	0.00	0.00	0.00	6,950.98

Create a different campaign with multiple lines where there is one Salesrep on the Campaign Header.

Edit the line item and click the tab “Salesreps”.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout										
Home	Sales Activity	Pricing	Other	Creatives	Custom Fields	Production Notes	Category MetaData	Sales Rep(s)		

Line-Level Sales Rep Assignments			
Override Sales Reps ☒ Yes			
ID	Name	Commission Percent	
SCONNORY	Sean Connery	100.00	

Brand-Level Sales Rep Assignments			
Sales Rep Assignment from: Group			
ID	Name	Commission Percent	
SHIGH	Shirley High	100.00	

Original Sales Rep Assignments			
ID	Name	Commission Percent	
SHIGH	Shirley High	100.00	

Check the flag “Override Salesreps”. Change the Salesrep for that line only.

The same results on the campaign commissions node and the Commissions report appear where the reversal is generated by the system in the current period and the new Salesrep commission record attached to the billing period.

Artist Setup Multi-Product Groups

Artist Setup allows for choosing multiple product groups to an artist. This is because some artists must see more than one product group for their assignments and not all of the groups when this field is left blank. The options for the product groups is dependent on the Group security setup.

Navigate to the menu Setup -> Artwork Workflow Setup -> Artist Setup.

ARTISTS SETUP

Artists Setup

Full Name	Groups	Inactive	
Vincent can Gogh vinny@testing.com 555-999-8787	4 items checked ☐ Check All ☐ Theatres (01) ☒ Company ABC - PLS Stop removing from ROOT Security (ABC) ☐ Amanda's DEV Testing Demo Group (AEDEV) ☒ All Glacier (ALLG) ☐ ANNAS REPORTING (ANNAS) ☐ All New Sloths (ANS) ☒ Automotive Group (AUTO) ☐ Auto Week Group (AW) ☒ Demo Group (DEMO) ☐ Farming Group (FG) ☐ GALAXY WEBSITES (GALAXY) ☐ Lifestyle (LI) ☐ Moms (MOMS) ☐ Shirley's Nature Groups (SHNA)	☐	☒
Claudine Monnet claudie@testing.com 555-555-9844			
Leotardo da Vinci lenny@testing.com 555-787-7877			
Salvador Dollar sal@testing.com 555-332-4523			
Sandy Warhol sandy@testing.com 555-989-6411			
Pablo Picante pablo@testing.com 555-142-6742			
Banksy Banksy banksy@testing.com 555-555-6667	3 items checked	☐	☒

In a blank box on the bottom of the screen, enter the Artist Full Name, Email Address and Phone number. In the Groups drop-down, if you leave blank, then the artist can access all groups. If you check one or multiple boxes, the artist will then see the orders for these groups. Click the + and Save the changes.

Proceed to create a material record on a campaign or on its own, enter the artist.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery Pin

Product Setup

PRODUCT GROUP SETUP

PRODUCT SETUP

- Product Listing
- Product Details**
- Material Handling
- Audience
- Demographics
- G/L Overrides
- GL Overrides Import
- Tax Overrides

PRICING RULES

- Ratecards
- Price Adjustments
- Auto Adjustments

SECTIONS & POSITIONS

- Sections
- Sections Import
- Positions
- Inventory by Position
- Positions Import
- Copy Sections/Positions

ISSUE-BASED SETUP

- Published Dates
- Issue Configuration

Product Settings G/L Defaults Campaign Parameters Order UDFs

Product ID AST +

Product Name Astronomy

Format Magazine (pub)

Inactive ☐ No

General Settings

Product Type Print Product (eg. Magazine, Newspaper)

Default Production Form Facebook

Ad Serving Platform

Invoice Line Group Print Lines

☒ Yes 

Hide Zero Value Lines on Invoices

When set to YES, lines with a zero value will not display on invoices.

Affidavit Template Form Shirley's Affidavit Template

Product URL

Company LIVEDATA

Primary Group Nature Pubs and Digital

Holiday Calendar(s)

Default Artist Assignment

Save the settings.

Navigate to create a campaign using this product and make the line item to be a zero value.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

Campaign

Campaign Setup

Line Items

- Material Management
- Edit CPM Delivery
- Campaign Budget
- Campaign Production Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts
- Tearsheet Contacts
- Generate Proposal / Confirmation
- Attachments
- Invoices & Payments
- Rep Commissions
- History of Changes
- Go to CRM View
- Go to Advertiser View

Advertiser Budget 0.00 Currency Local Currency

Line Details Applied Incentives Tickets

Booking Wizard Quick Line Entry Astronomy Display Advertising Full Line Entry Prod. Schedule Audience Planner Audience Reach Send a Proposal

Advertising Orders

Split Lines Delete Selected Lines Check Incentives Bulk Update Metadata Numbers in the Grid Display Estimated Net Amounts

ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Total	Ratecard Pn
☐ 19106	RON2022	Medium Rectangle	CPM	7/1/2022	12/31/2022		1,684.78	1,684.78	1,630.43	1,684.78	1,630.43	1,684.80	10,000.00	0.00
☐ 19111	SPCA Magazine Size: Inserts (8 x 9) Section: Anywhere Position: Anywhere Color: Full Color (4C)	Inserts	INS	7/1/2022	7/1/2022		1,000.00	0.00	0.00	0.00	0.00	0.00	1,000.00	0.00
☐ 19129	Astronomy Size: 1 Page (8 x 11) Section: Anywhere	1 Page	NR	7/1/2022	7/1/2022		0.00	0.00	0.00	0.00	0.00	0.00	0.00	-100.00
							2,684.78	1,684.78	1,630.43	1,684.78	1,630.43	1,684.80	11,000.00	

Linked Exhibition Orders

Attach an Exhibition Order New Exhibition Order



Click the node on the campaign header “Generate Proposal Confirmation”. Choose the template and click “Email PDF” option for example.



CRM

The currency field is added to the abbreviated customer creation screen in CRM.

Page 39 of 43

ADD A NEW ACCOUNT

Go to Full Name Maintenance

New Account

Account Name

Enter a location

Account Type

Advertiser / Exhibitor

Client Type

Industry Category/PIB

Name Class

Parent Account

Search

Remove

Multiple Brands/Divisions

No, This Advertiser Uses One Brand

Agency ID

Agency Name

Search

International Tax ID

Tax Code

Foreign Billing Currency

Source

Call in

Phone No.

Fax

Website

Country

UNITED STATES

Address

Zip Code

City

State

MINNESOTA

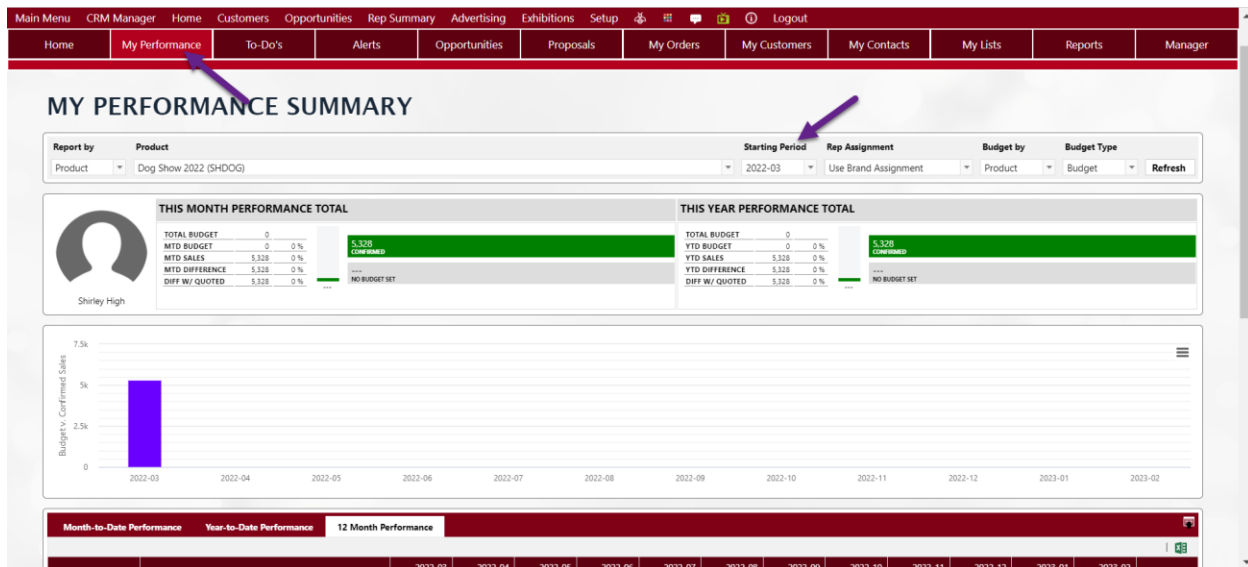
Only set a Billing Currency when it is different from your base currency.

Choose the Billing Currency field for the new client you create and save the settings. This client will always be displayed and billed in the new currency.

Salesrep Performance Exhibition Dates

The Salesrep Performance report displays the rep's exhibition orders for the Financial Period which is based on the confirmation date or the order entry date.

Navigate to the menu tile "My Performance" on the Salesrep CRM screen.



Enter the financial period which matches either the confirmed or entry date of the order.

Click the 12 Month Performance tab and the data displays for the various exhibition order statuses.

Accounts Receivable

Foreign Currency Field in Create Account

System allows for entering the billing currency for a new account.

Navigate to the menu Customers -> Name Address Maintenance. Click the + to create a new account.

Enter the account information including the currency for the customer.

Exhibition

Import Proof of Insurance

User can import proof of insurance in bulk for existing exhibitors.

Navigate to the menu Setup -> Import Proof of Insurance.

Click Download template and fill in the details of the template then save to your desktop. The details of the template are as follows:

Field	Example	Comments	Mandatory
Account ID	244534	This is the account ID of the exhibitor in Naviga and must match. This can be also be the exhibitor's legacy ID if you check the box "Use Legacy ID" on the import page.	Yes
Valid Thru Date	12/31/2022	Date format according to the system setup.	Yes
Is Received	Y	Y for yes and N for No.	Yes

On the Naviga screen, click the Browse to select this saved template. Click "Test Import" and correct any issues the system may identify. If you need to fix any errors, you must then click the x remove in the import page and re-browse and select the saved template. Repeat the process of the Test import until all problems are resolved.

Then click “Import File”. The system confirms the import.

Navigate to the menu Exhibitor -> Exhibitor Maintenance.

Orders Billing Analysis Setup Logout

ACCOUNT: EXHIBITOR SETUP

Account Maintenance

- Name and Address Setup
 - Employees / Contacts
 - Addresses
 - Fulfillment Information
 - External Contacts
 - External System IDs
 - Account Overview
- A/R Setup
- Advertising Setup
- Job Costing Setup
- Newsstand Setup
- Exhibition Setup**
- Book Setup
- Subscription Setup
- Channel Privacy Preferences
- Attachments
- Cards on File
- Account Alerts
- History of Changes

Exhibitor Setup **Divisions**

Account ID 244534

Account Name J.W.Schultz

Exhibitor Details

Main Address ID 245793

Address

J.W.Schultz
327 Buffalo St
PO Box 1088 Stn Main
Suite 455498
Winkler, MB R6W 4B2
CANADA
Tel: 011 9147878888

Account Status **In Good Standing**

Account Opened 10/4/2013

Last Updated 6/30/2021

Is this an Agency ☐ No

Use Multiple Divisions ☒ Yes

Exhibitor Type MEMBER EXHIBITOR

Billing Info

Proof of Insurance received ☒ Yes

Proof of Insurance valid thru Saturday, December 31, 2022

Tax Code 5 % TAX

Terms 2% 10 DAYS

Choose the imported exhibitor in the import template. Scroll to the Billing Info section on the node Exhibition Setup and note the “Proof of Insurance Received” flag matches the import file data as well as the Valid Through date.