User Guide 2022.5

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Purpose

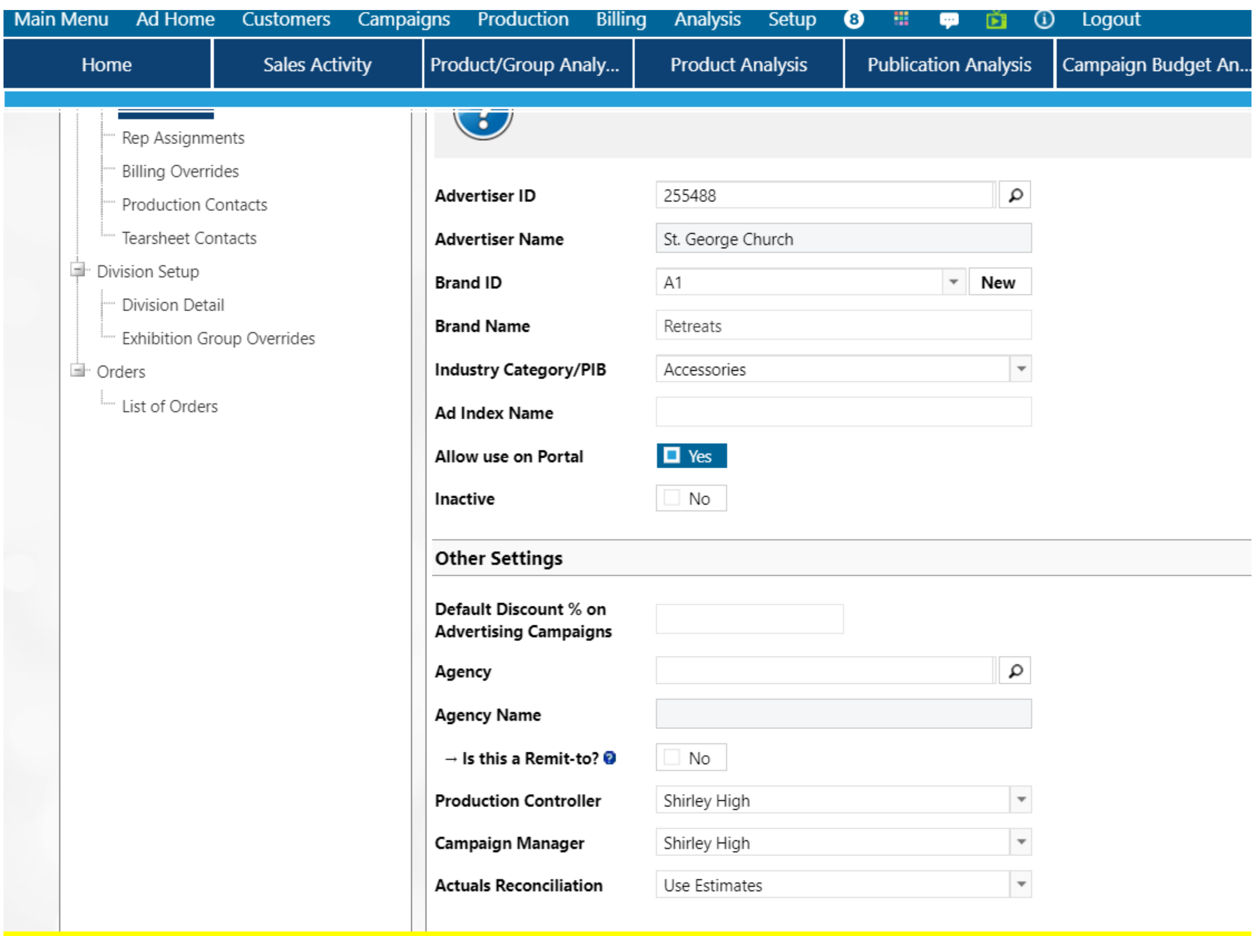
This document provides a step by step guide to 2022.5 features and how to apply them in Naviga.

Advertising Module

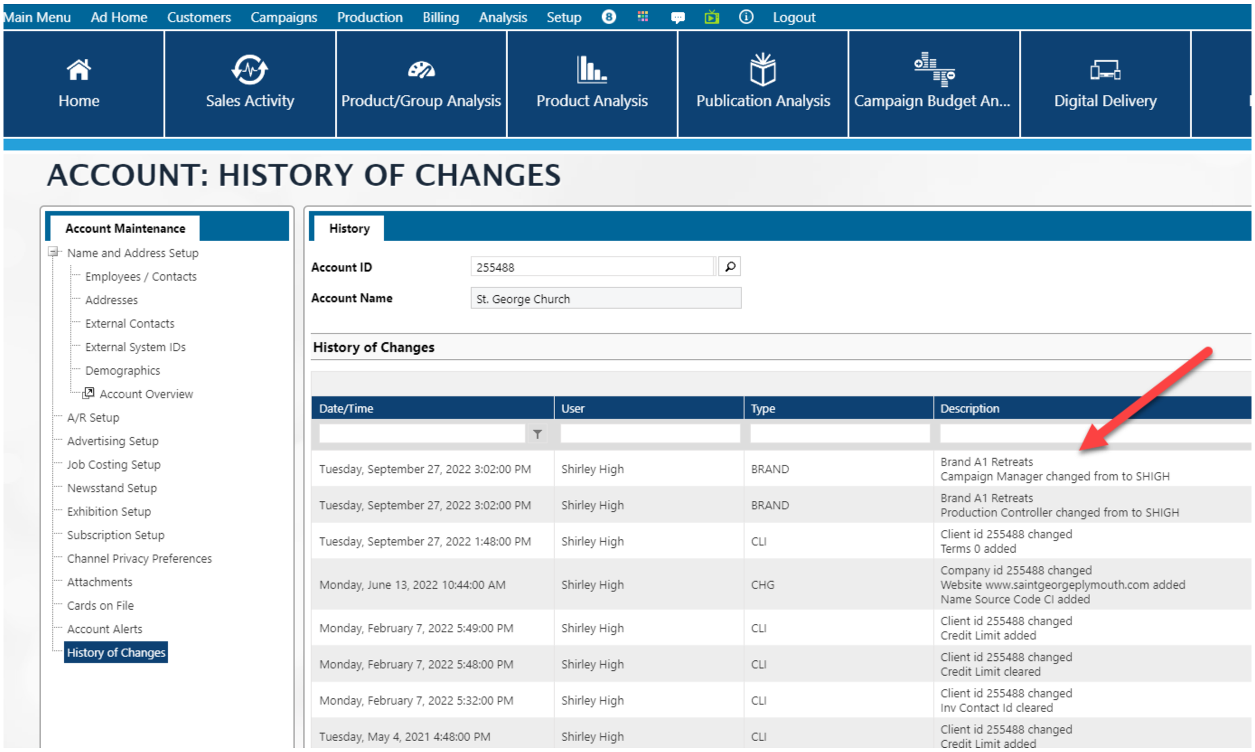
Brand Changes Track History

Brand changes are tracked in the advertiser account history of changes in the advertiser maintenance screen.

Navigate to the menu Customer -> Advertiser Agency Maintenance -> Advertising Setup -> Brands tab. Choose the advertiser and brand and make any edits in the fields on the brands screen. Save the settings.



Return to the menu Customers -> Advertiser Agency Maintenance and choose the same advertiser in the drop-down menu. Then click the History of Changes node.

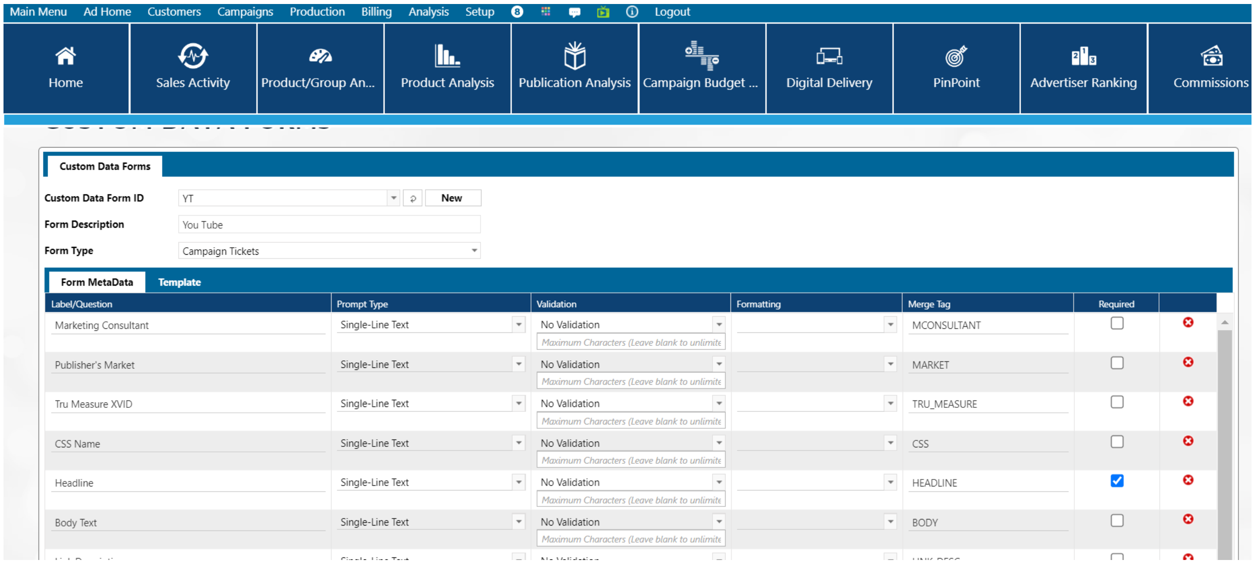


Note the changes and details of what changed are listed.

Default Custom Form Defaults

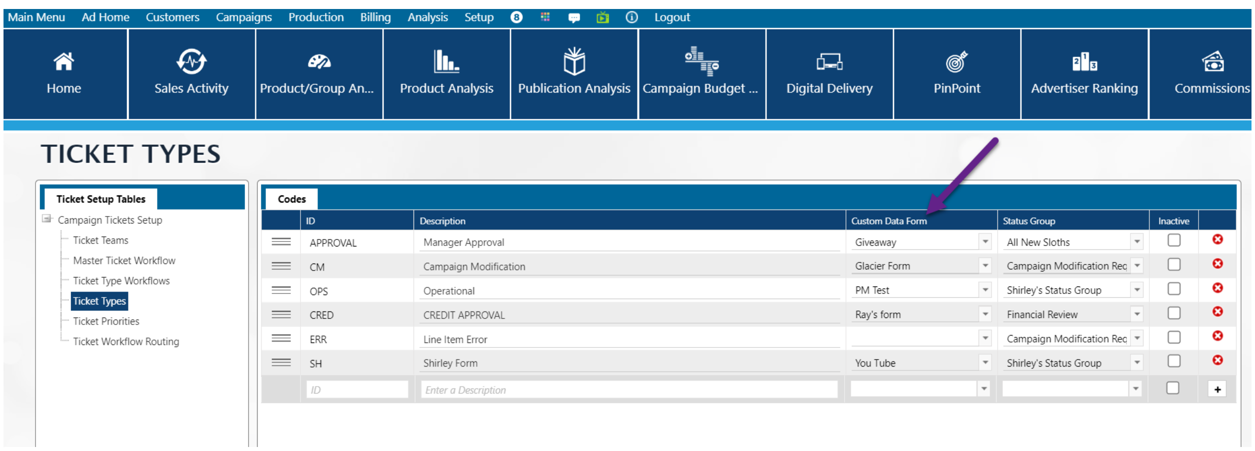
Default Custom Data Form can be set as the default at the Campaign Ticketing level available for use in the tickets on a campaign.

Navigate to the menu Setup -> Production Forms Setup. Create a form and check the box “Campaign Tickets” as the type and save it.



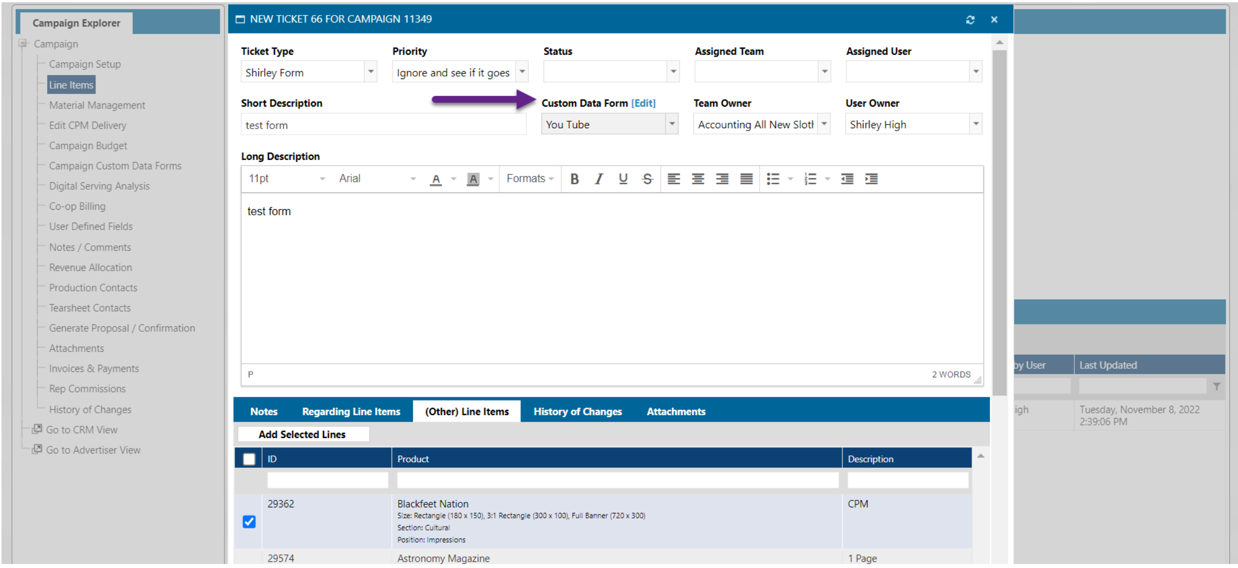
Enter all details in the Form Metadata allowing you to enter this data in the ticket system.

Click the menu Setup -> Advertising Setup -> Ticket type Setup -> Ticket Types.



Enter the ID, Description and choose the Custom Data Form and Status Group to tie this form to them. Click + and Save.

Create a new campaign and then create a ticket for the line using the button “Tickets”. Then click “New Ticket”.



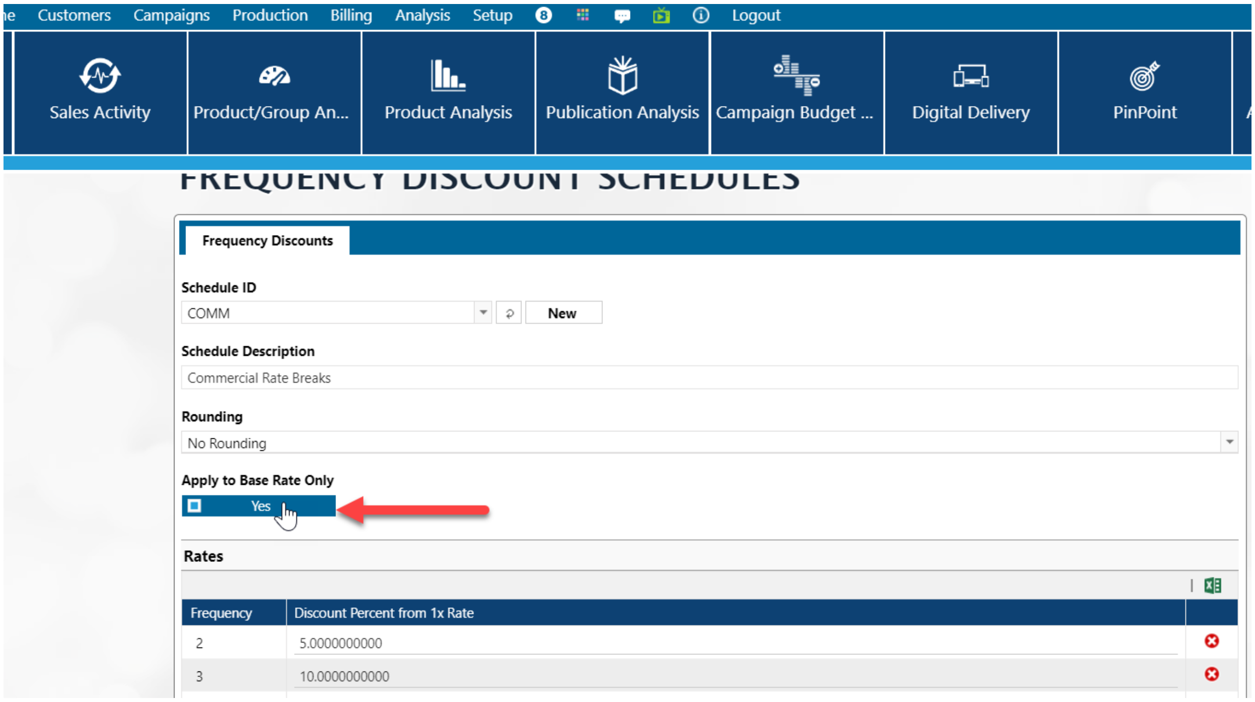
When you choose the Ticket Type as per setup above, the Custom Data Form field is filled in by default according to the setup above.

You can then click the Edit link and enter all information setup in the Default Custom Form Defaults menu.

Frequency Discount Schedule Base Rate Only

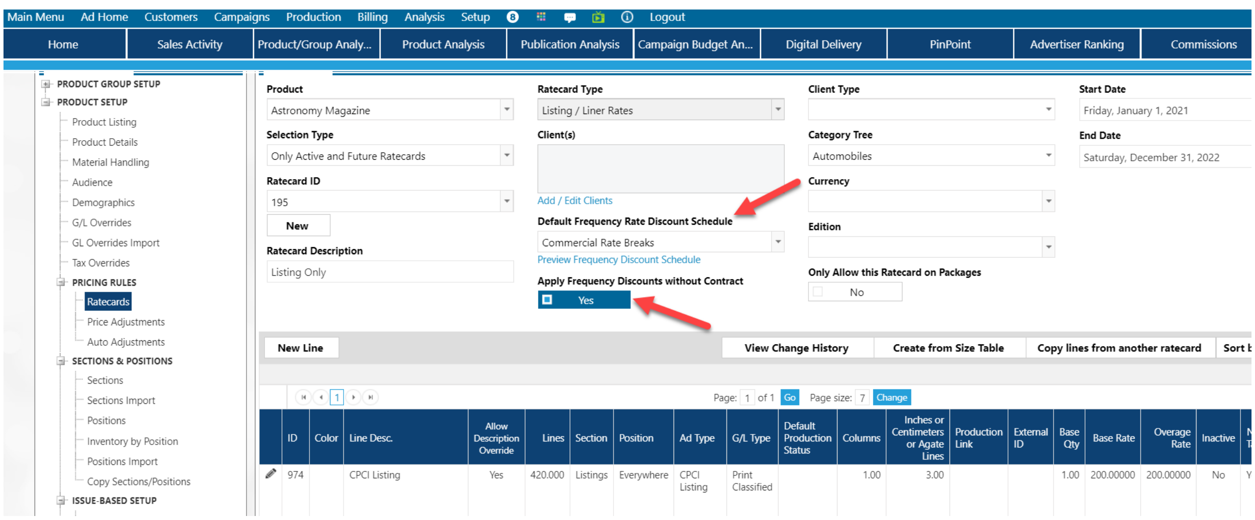
The Frequency Schedule Discount Rate Setup screen has a new flag Apply to Base Rate Only where when checked applies the discount to the base rate on the Ratecard and while unchecked the frequency discount is applied to the price per insertion instead. This applies only to classified liner ads.

Navigate to the menu Setup -> Advertising Setup -> System Parameters -> Frequency Discount Schedule.



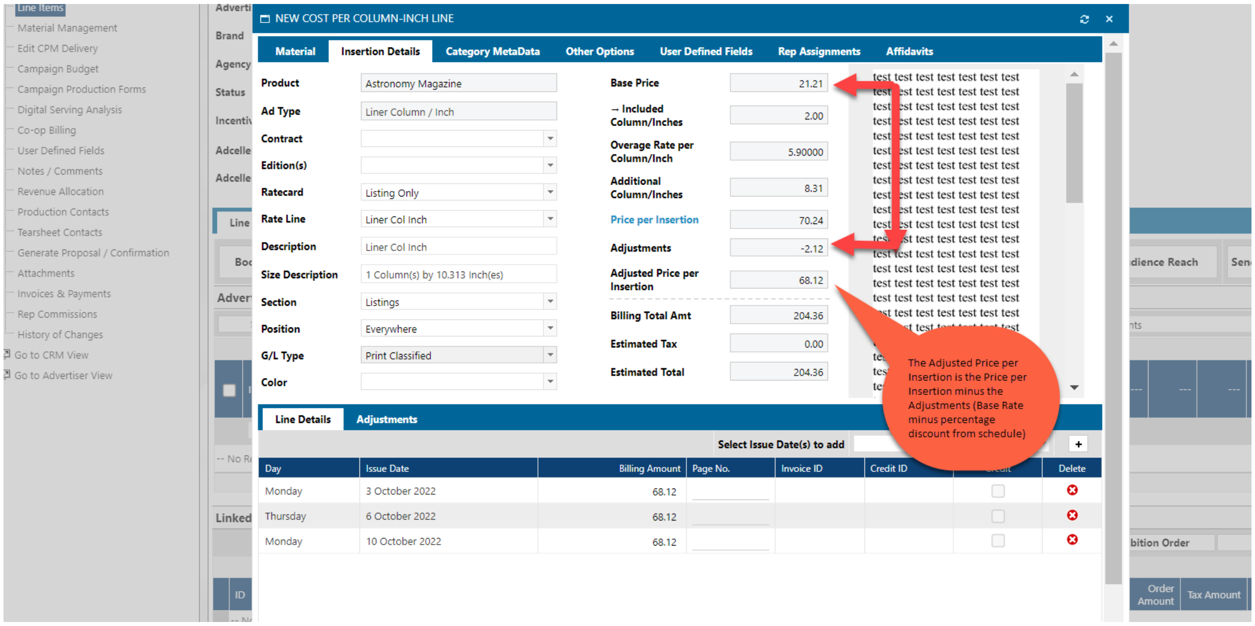
Choose the frequency discount which you will apply to a Ratecard from the drop-down menu. Check the flag "Apply to Base Rate Only" and save the settings.

Navigate to the menu Setup -> Product Setup -> Ratecards and choose a product from the drop-down menu and choose a Classified Ratecard which has Liner Rate Lines or add a new one.



Select the Frequency Discount Schedule you have setup above from the dropdown menu and click the flag "Apply Frequency Discounts Without Contract". Save the settings.

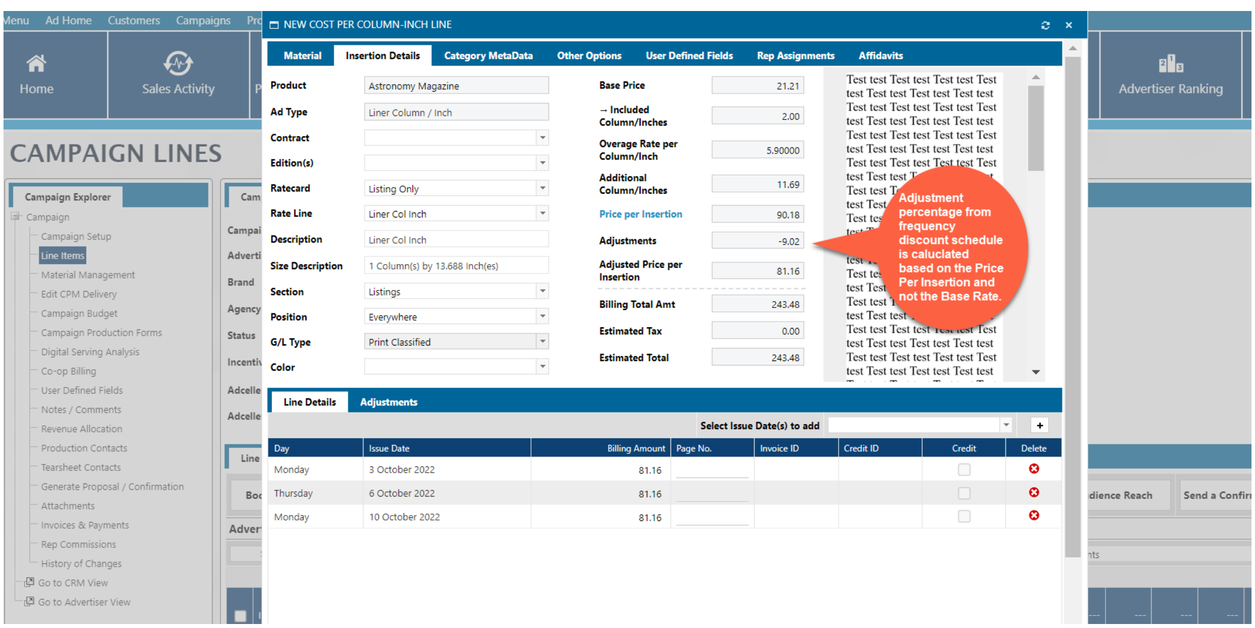
Navigate to the menu Campaigns -> Enter a New Campaign and create a campaign line item using this product, Ratecard and Rateline. Enter several lines to trigger the discount setup in the schedule.



The Adjusted Price per Insertion is the Price per Insertion minus the Adjustments. Adjustments is the Base Rate minus percentage discount from schedule applied to that Base Rate.

Navigate back to the Discount Schedule and uncheck the Flag “Apply to Base Rate Only”. Save the settings.

Create a different campaign using the same Product, Ratecard and Rateline as above. Add several lines to trigger the discount setup in the schedule.

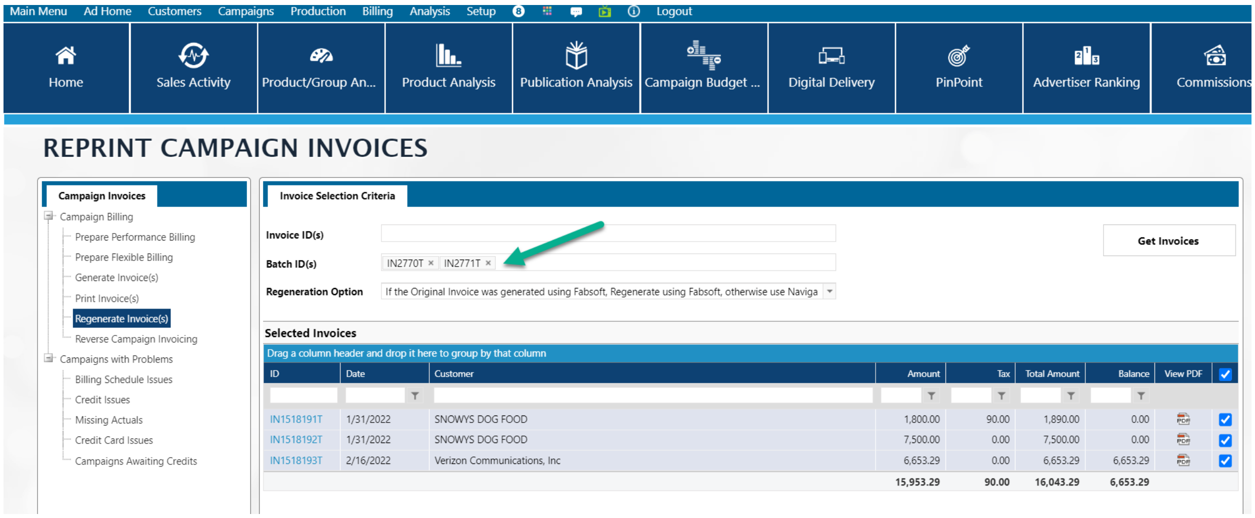


The discount percentage from the schedule is now applied to the Price Per Insertion and not the Base Rate. The result is the Adjustments which is then subtracted from the Price per Insertion giving the Adjusted Price per Insertion.

Regenerate Invoice Batch

Regenerate Invoices process now accommodates regenerating Batches in full in addition to the previous ability to generate invoices. This allows for large number of invoices to be regenerated as needed.

Navigate to the menu Billing -> Campaign Billing -> Campaign Billing -> Regenerate Invoices.



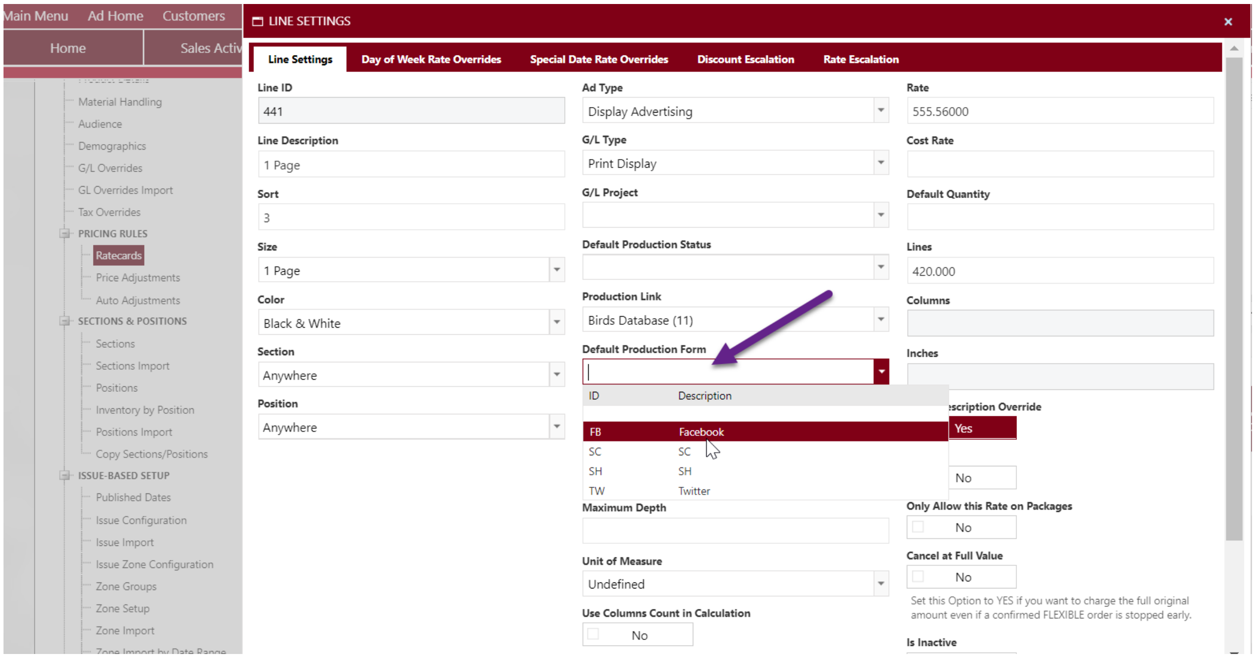
Enter the various numbers of batches you'd like to regenerate. Click "Get Invoices".

A list of invoices displays, and you can check the boxes for individual invoices or check the top box to select all invoices. Then click "Regenerate Invoices". The invoices are regenerated successfully, and you can search for them and display the contents of the PDFs.

Default Production Form on Ratecard Line

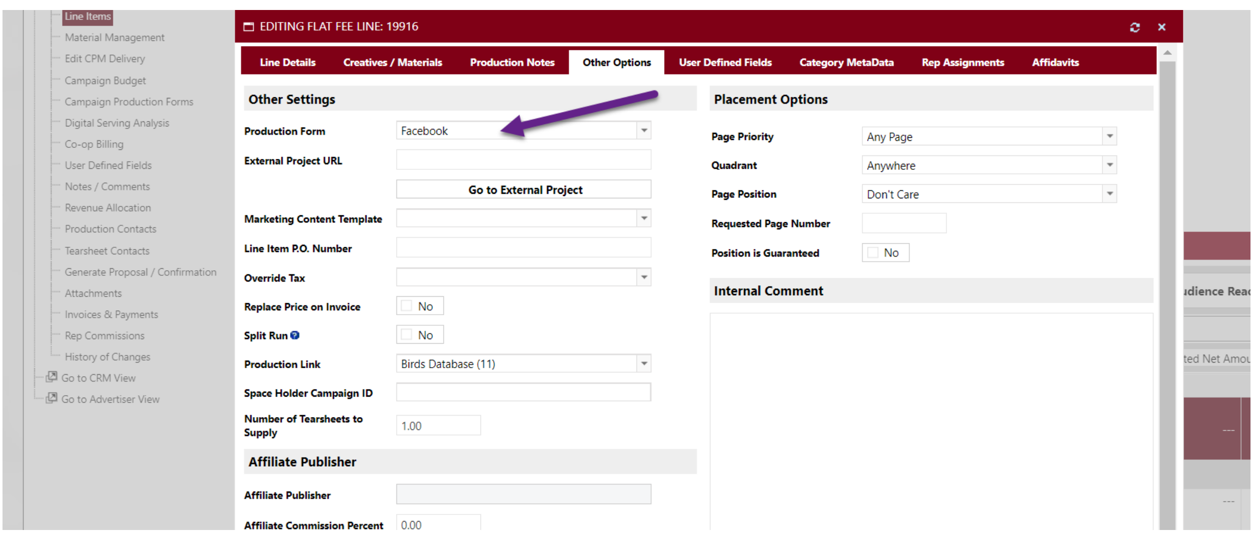
Default Production Form is an added field to the Ratecard line as a default value, so that when the Ratecard line is chosen in order entry, the production form setup on the line will default into the line.

Navigate to the menu Setup -> Product Setup -> Ratecards. Choose the product from the drop-down menu and its Ratecard. Click the Ratecard line. Choose a value for the Default Production Form from the drop-down menu.



Save the Ratecard line. Navigate to create a campaign using this Ratecard line.

Navigate to the menu Campaigns -> Enter a New Campaign using this Ratecard line.

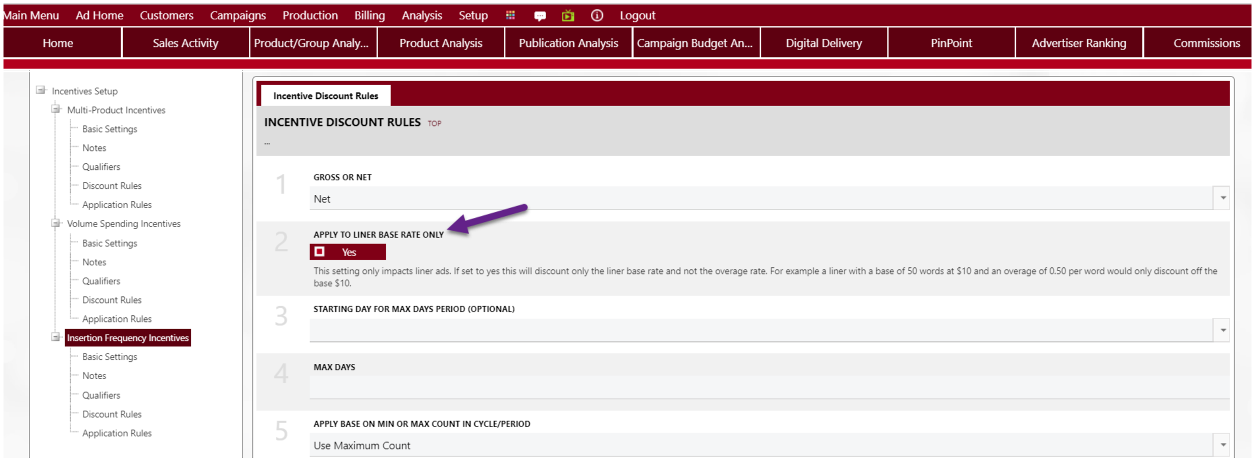


Click the "Other Options" tab on the line and the Production Form value is defaulted there.

Frequency Incentive on Base Rate Only for Liner Ads

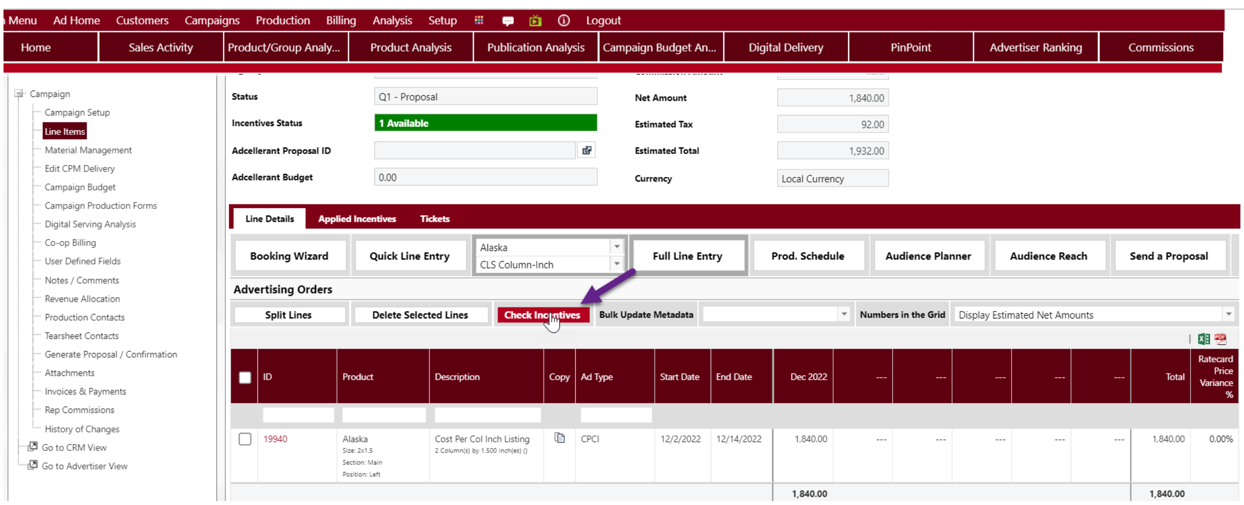
Incentive package can be setup in case of the Liner ads to apply the frequency discount to apply to the base rate only and not to the overage rate.

Navigate to the menu Setup -> Advertising Setup -> Incentive Setup and scroll to the Insertion Frequency Incentive section. Create a New Incentive package and enter all details regarding classified ad type as a qualifier. Enter the discount levels as well to trigger a frequency discount at 2 issues.

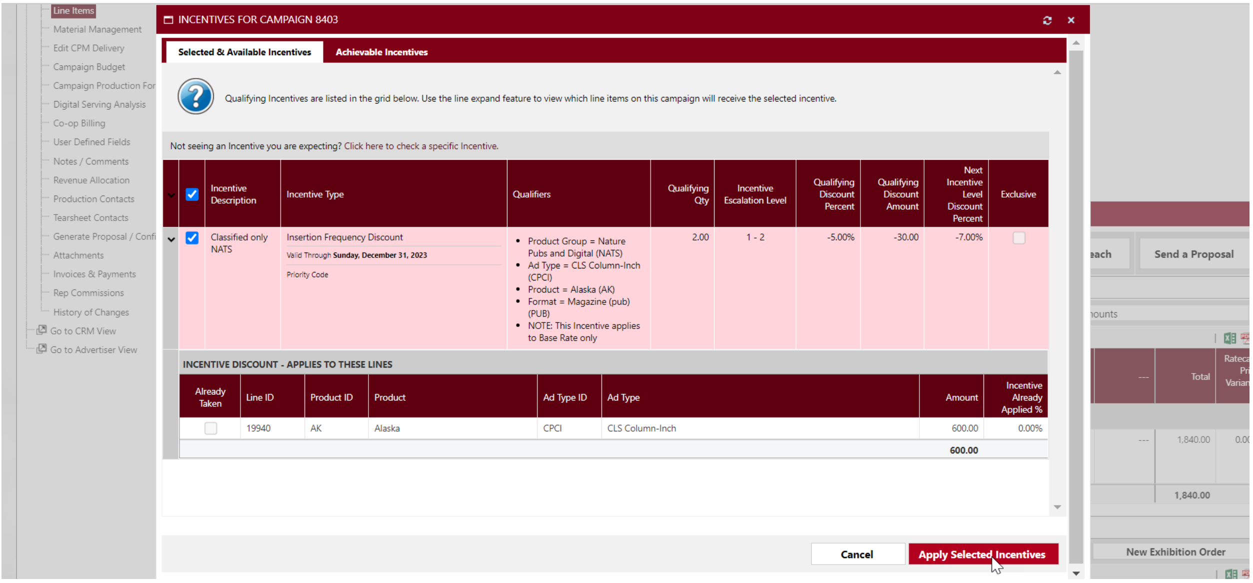


Scroll to the Incentive Discount Rates section and check the flag “Apply to Line Base Rate Only”. Save the incentive package.

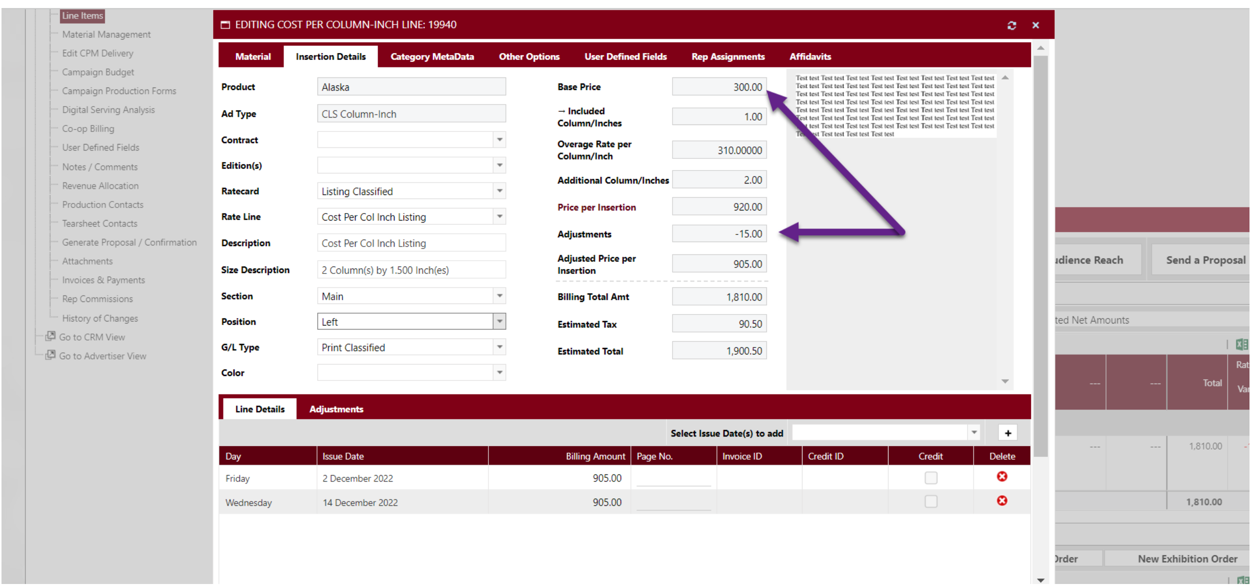
Navigate to the menu Campaigns -> Create a new campaign and create a line item using a Ratecard line which has overage amounts calculated and with 2 issues using this Ad Type in order to trigger eligibility for this incentive package.



Click the “Check Incentives” button.



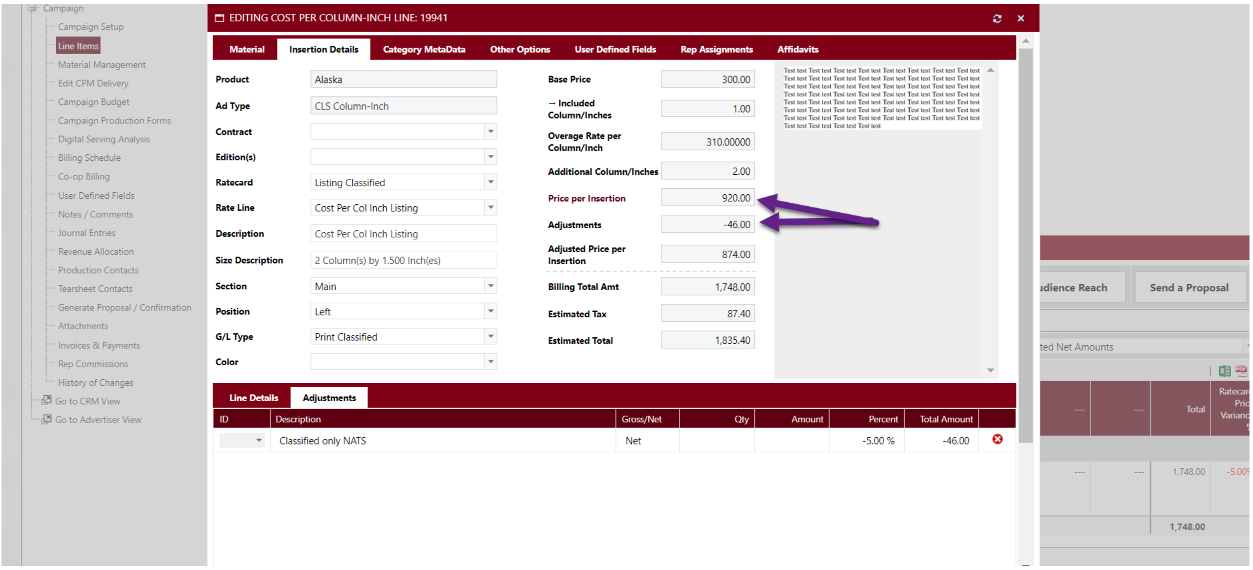
Apply the incentive to the line. Click the line item.



Note that the incentive adjustment percentage is applied to the Base Rate to produce the adjusted price per insertion.

Return to the incentive package and uncheck the flag to “Apply to Base Rate Only” to set its value as “No”.

Create a new campaign using the exact lines as the campaign above.

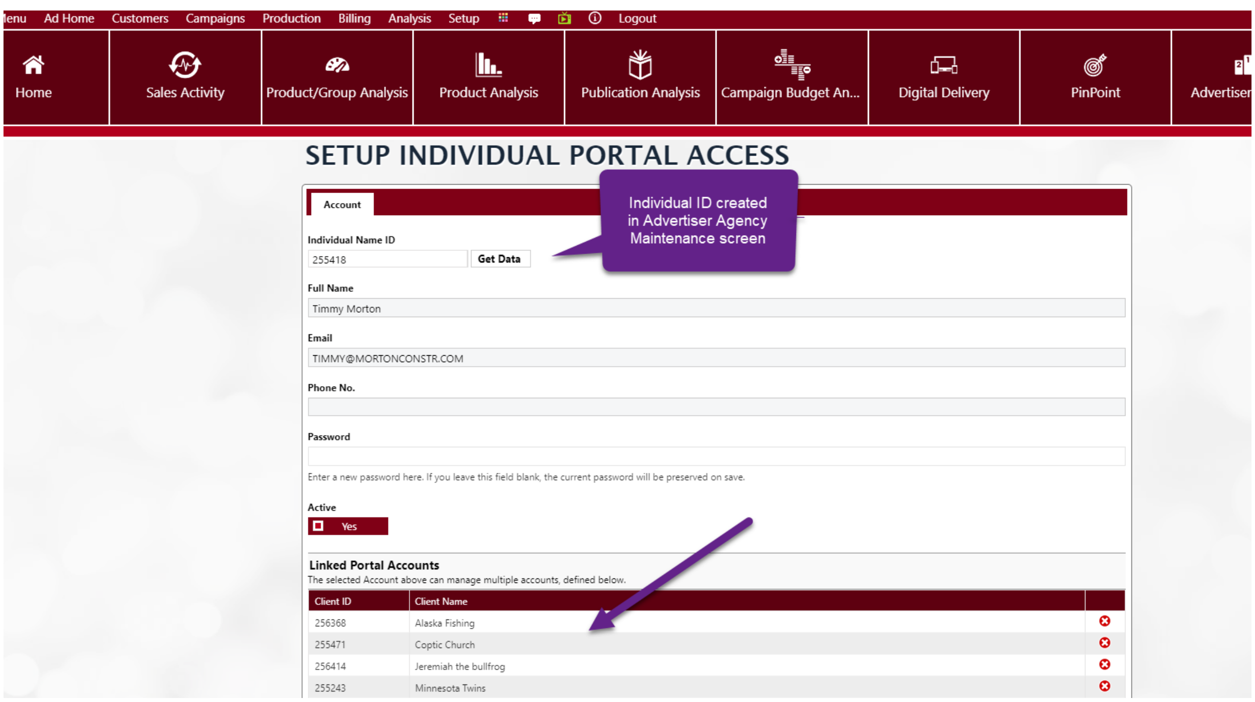


Note the Incentive discount is now applied to the Price Per Insertion which includes the Overage Rate calculated prior to the discount being applied.

One Individual Account to Access Multiple Client Portal Accounts

One Portal's individual can now access multiple client Portal accounts to facilitate the approval of proposals or payment of invoices for these clients.

Navigate to the new screen in the menu path Setup -> Admin -> Portal setup -> Setup Individual Portal Access.

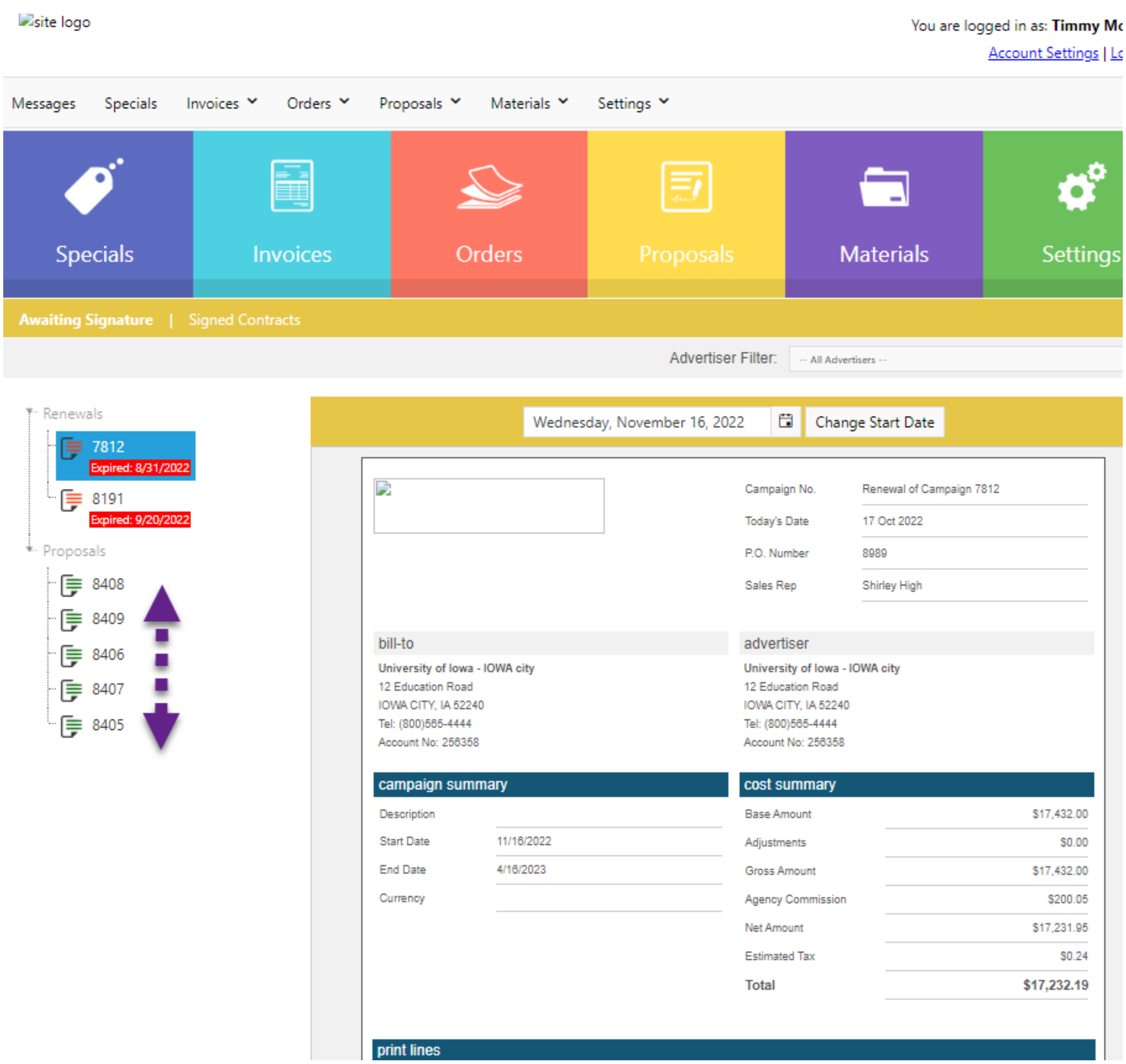


Enter the name or individual ID which is created in the menu Customers -> Advertiser Agency Maintenance screen.

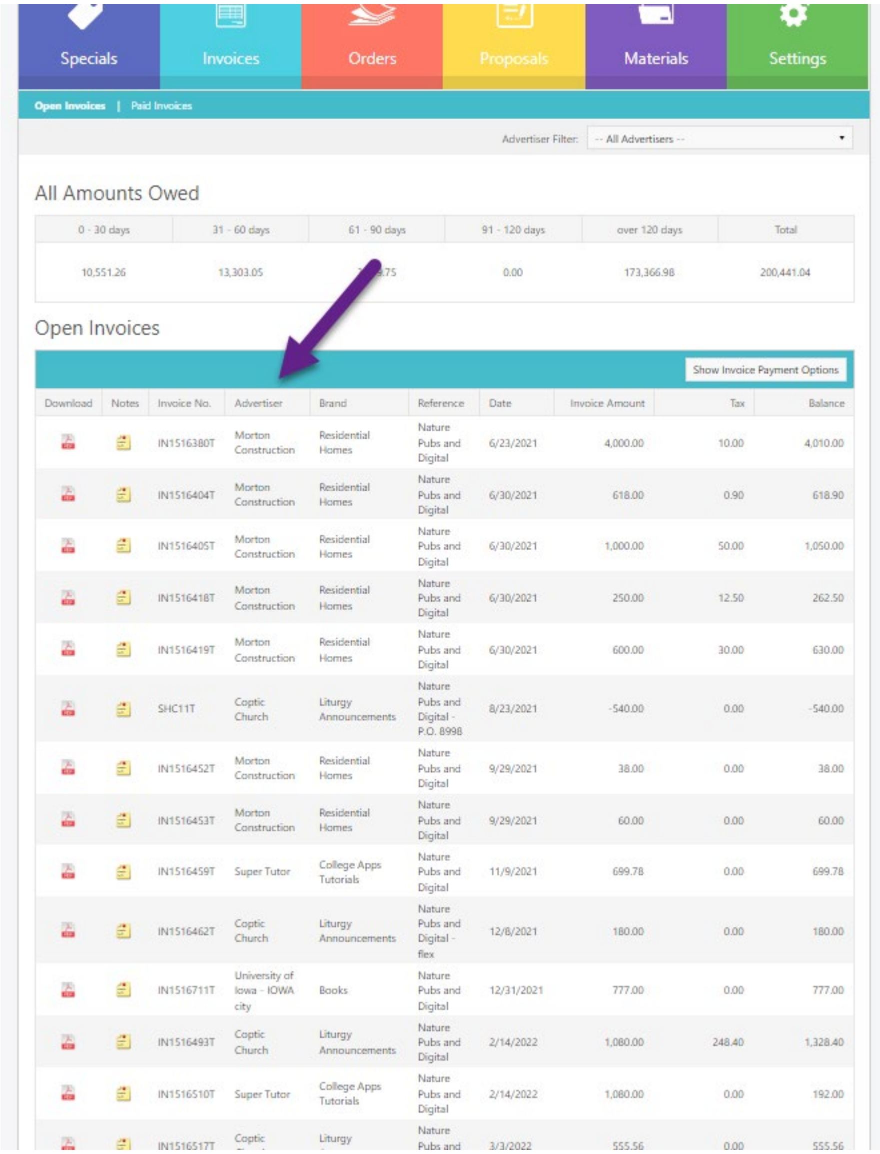
Check the flag "Active" to change its value to "Yes".

Add the advertisers in the drop-down menu under Linked Portal Accounts. This the list of advertisers which this individual can now access son the Porta. Enter a password which this individual will use to login to the Portal. Save the settings.

Navigate to login to the Portal using this individual's email address and password. In the Proposals tab, this individual can see all the proposals from all various clients who are sent proposals from Naviga Ad.



Click the Invoices tab.


Specials | Invoices | Orders | Proposals | Materials | Settings

Open Invoices | Paid Invoices

Advertiser Filter: -- All Advertisers --

All Amounts Owed

0 - 30 days	31 - 60 days	61 - 90 days	91 - 120 days	over 120 days	Total
10,551.26	13,303.05	[illegible].75	0.00	173,366.98	200,441.04

Open Invoices

Show Invoice Payment Options

Download	Notes	Invoice No.	Advertiser	Brand	Reference	Date	Invoice Amount	Tax	Balance
		IN1516380T	Morton Construction	Residential Homes	Nature Pubs and Digital	6/23/2021	4,000.00	10.00	4,010.00
		IN1516404T	Morton Construction	Residential Homes	Nature Pubs and Digital	6/30/2021	618.00	0.90	618.90
		IN1516405T	Morton Construction	Residential Homes	Nature Pubs and Digital	6/30/2021	1,000.00	50.00	1,050.00
		IN1516418T	Morton Construction	Residential Homes	Nature Pubs and Digital	6/30/2021	250.00	12.50	262.50
		IN1516419T	Morton Construction	Residential Homes	Nature Pubs and Digital	6/30/2021	600.00	30.00	630.00
		SHC11T	Coptic Church	Liturgy Announcements	Nature Pubs and Digital - P.O. 8998	8/23/2021	-540.00	0.00	-540.00
		IN1516452T	Morton Construction	Residential Homes	Nature Pubs and Digital	9/29/2021	38.00	0.00	38.00
		IN1516453T	Morton Construction	Residential Homes	Nature Pubs and Digital	9/29/2021	60.00	0.00	60.00
		IN1516459T	Super Tutor	College Apps Tutorials	Nature Pubs and Digital	11/9/2021	699.78	0.00	699.78
		IN1516462T	Coptic Church	Liturgy Announcements	Nature Pubs and Digital - flex	12/8/2021	180.00	0.00	180.00
		IN1516711T	University of Iowa - IOWA city	Books	Nature Pubs and Digital	12/31/2021	777.00	0.00	777.00
		IN1516493T	Coptic Church	Liturgy Announcements	Nature Pubs and Digital	2/14/2022	1,080.00	248.40	1,328.40
		IN1516510T	Super Tutor	College Apps Tutorials	Nature Pubs and Digital	2/14/2022	1,080.00	0.00	192.00
		IN1516517T	Coptic	Liturgy	Nature Pubs and	3/3/2022	555.56	0.00	555.56

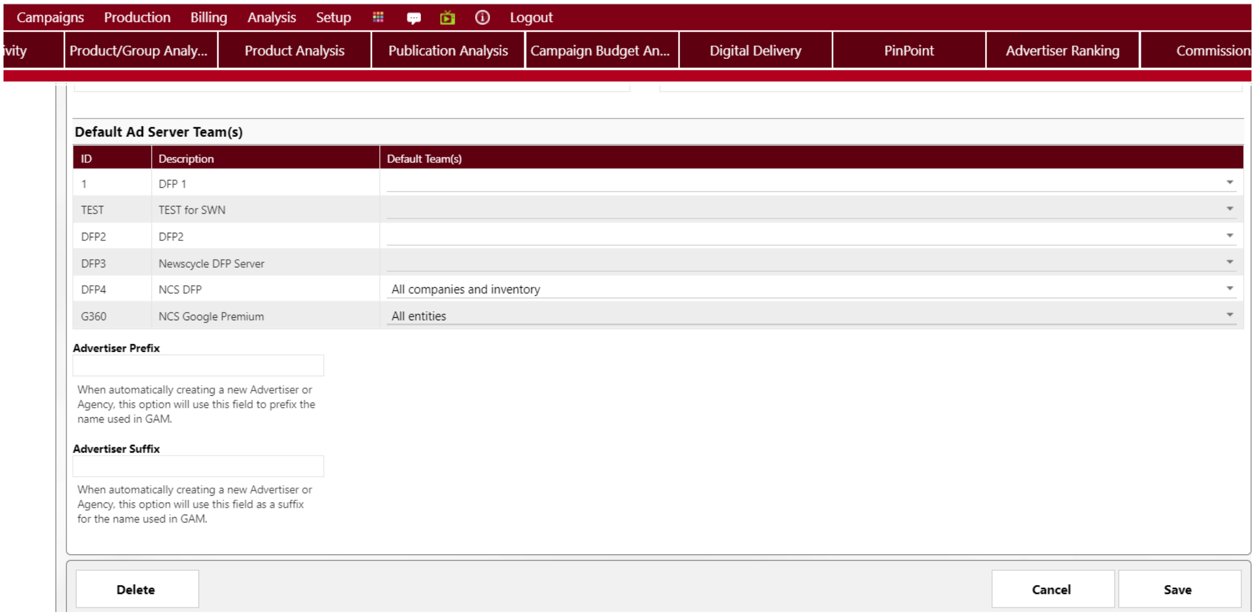
This individual can now manage the invoices for all the various clients.

Default Ad Server Team on Product Group

New Default Ad Server Team(s) field on the Product Group Setup menu. The choice of teams here is the default value which will display in the Campaign Entry "Other Information" tab. This will override the team value setup in the Ad Server Setup screen associated with the server.

Navigate to the menu Setup -> Product Group Setup. Choose a product group from the drop-down menu.

Scroll to the section "Default Ad Server Team(s)".



Choose the default team(s) corresponding to the server. Then Save. This value is going to be the default value for all digital products synchronized with an AD Server listed in this screen.

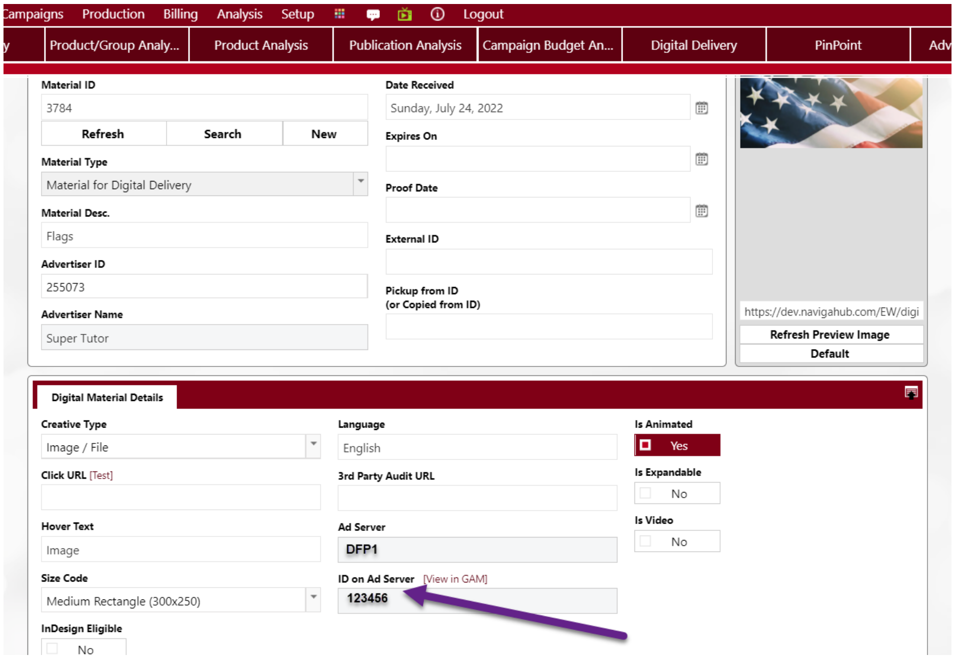
This choice overrides the value in the menu Setup -> Admin -> Ad Server Integration Setup in “Other Settings” section in the field “Default Campaign Team”.

Navigate to create a campaign with a line item in a digital product in this product group attached to one of the AD Server listed in the Product Group screen. Navigate to the “Other Information” and view the AD Server Teams default value.

AD Server Material ID on Material Record and Production by Product

Materials records have AD Server ID and accompanied by a new configurable field in Production by Product report. This provides a fast check that materials have been successfully passed onto the AD Server on the material record as well as on the Production by Product.

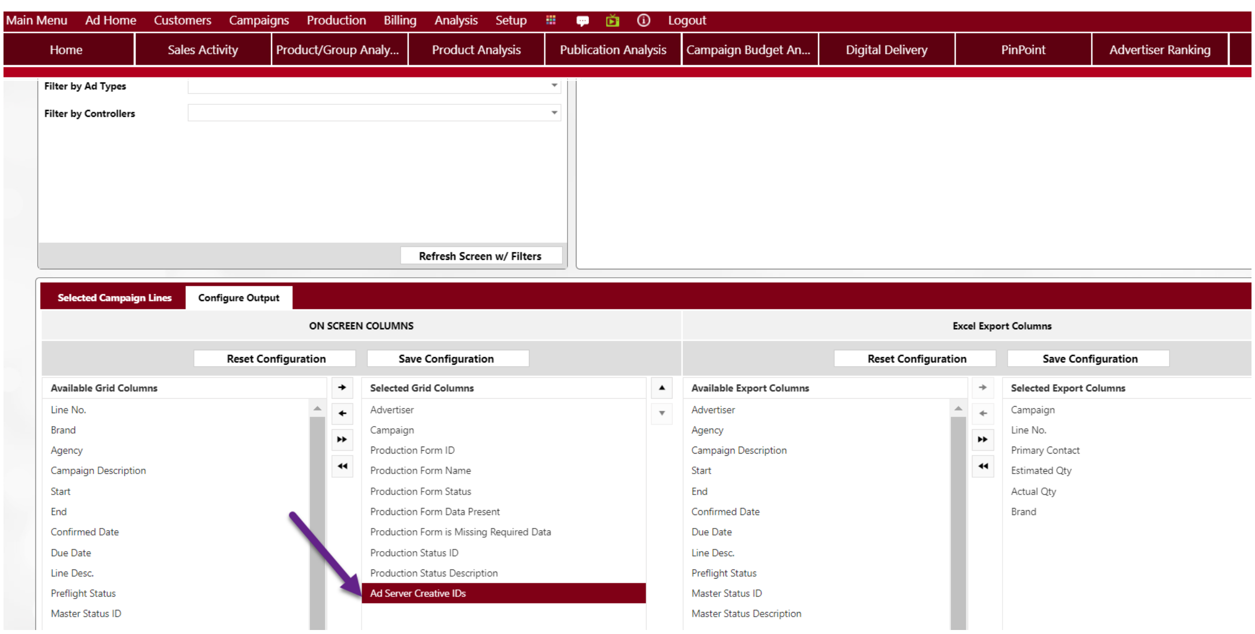
Navigate to the menu Production -> View/ Edit Materials. Search for a material record for digital products. You can search by advertiser or other criteria.



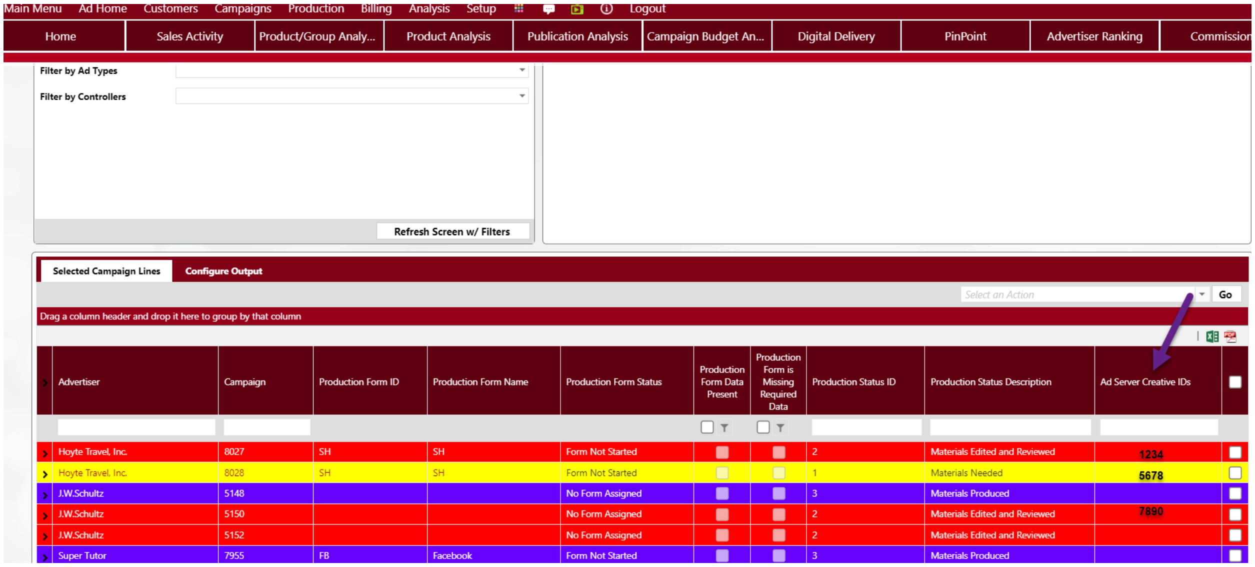
Note the ID on AD Server. This material record is attached to the line item and displays this information.

Navigate to the menu Production -> Production by Product (non-print). Search on the product attached to the AD Server and has passed the materials on orders to the AD Server.

Click the tab “Configure Output”. In the “Available Grid Columns”, click the record “Ad Server Creative ID” and click the right facing arrow to move the field to the “Selected Grid Columns”.



Click Save Configuration.

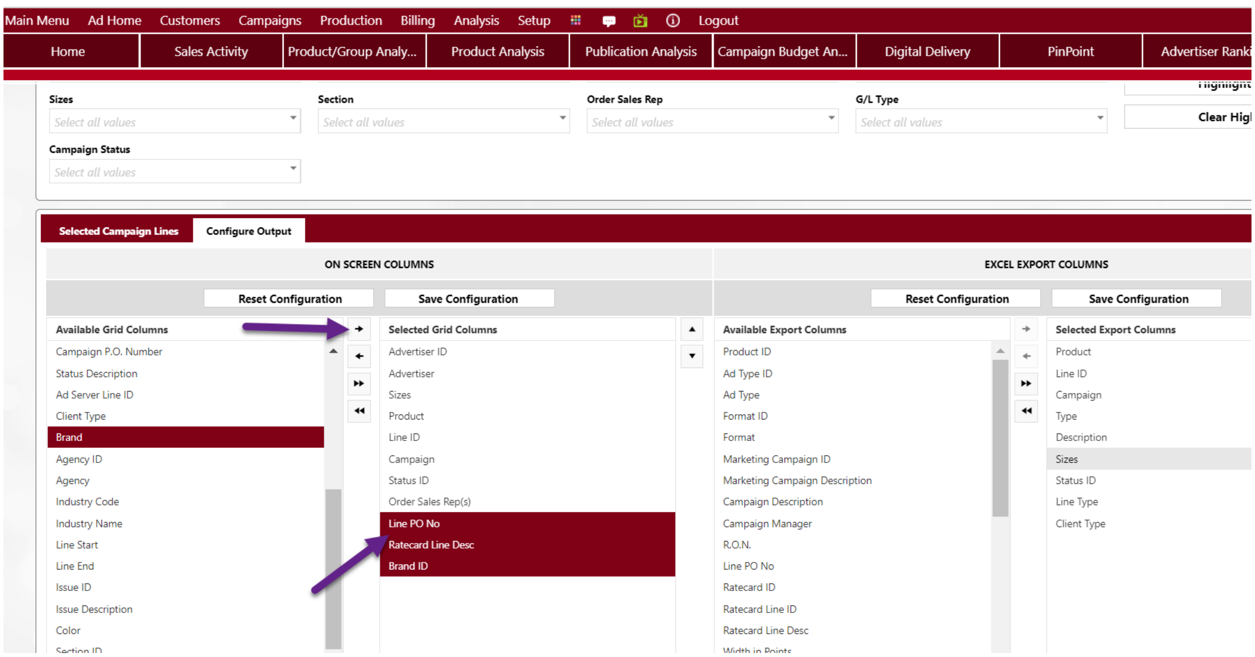


The report refreshes on the screen and displays the Material ID on each line item attached to the AD Server and for which the material passed successfully to the AD Server.

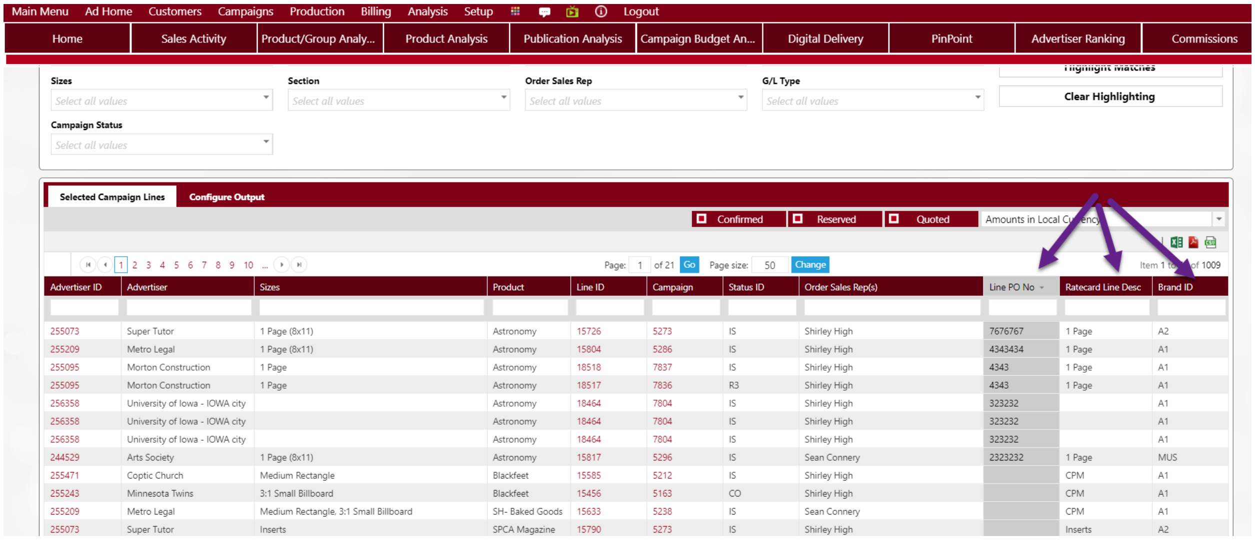
Orders by Product Configurable Fields

The Orders by Product report contains new configurable fields: Brand ID, Ratecard Line Description, and PO.

Navigate to the menu Campaigns -> Orders by Product. Click the tab “Configure Output”.



Click the fields “Line No PO”, “Brand Id” and “Ratecard Line ID” and “Issue Description” and click the right facing arrow to add the fields from the Available Grid Columns to the Selected Grid Columns. Save Configuration to save the settings.



The report displays the Line PO Number and the Ratecard Line Description for each line which has data.

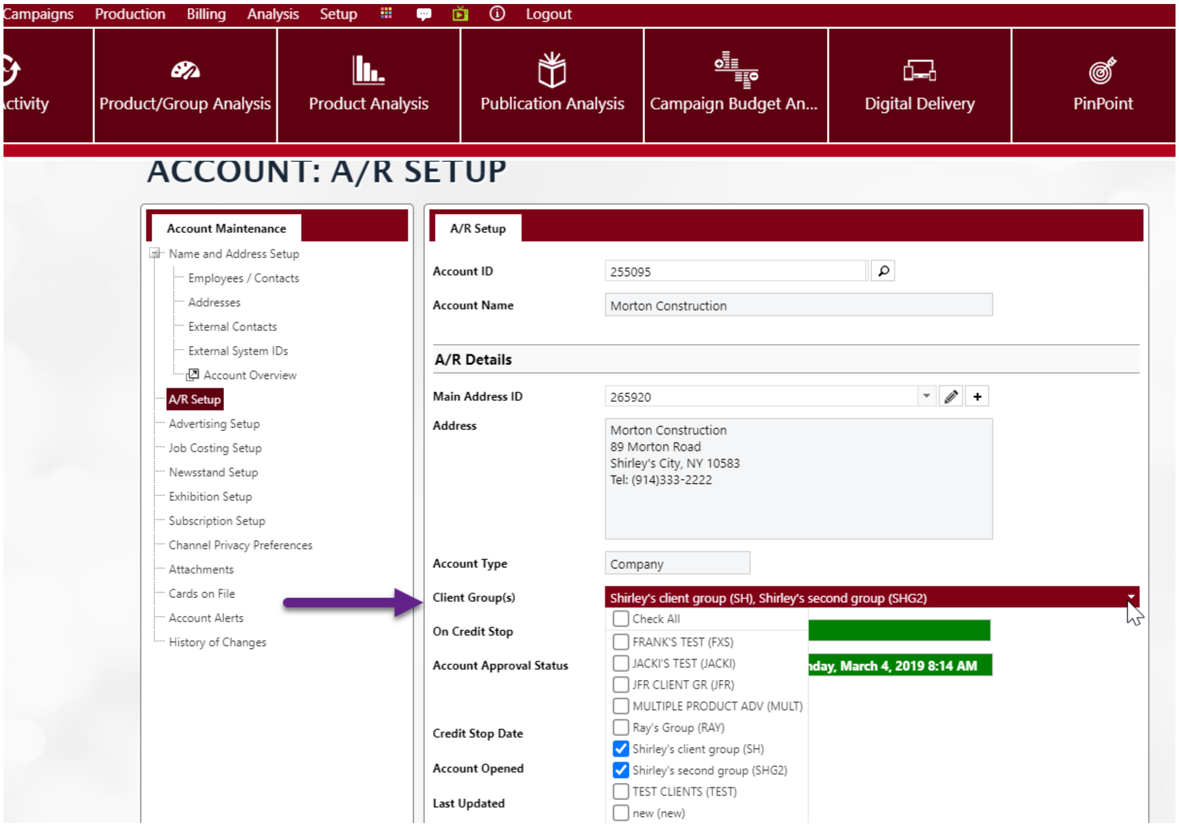
The same can be done for the Excel Export in the Configure Output tab.

Client Group Changes

Simplifying of adding an advertiser to a client group. Advertisers can now be added to a Client Group from the Advertiser Agency Maintenance screen. A Client Type Default also includes a Client Group selection which can attach this Client Type by default when creating a new advertiser to a specific group.

Assign an Advertiser to a Client Group

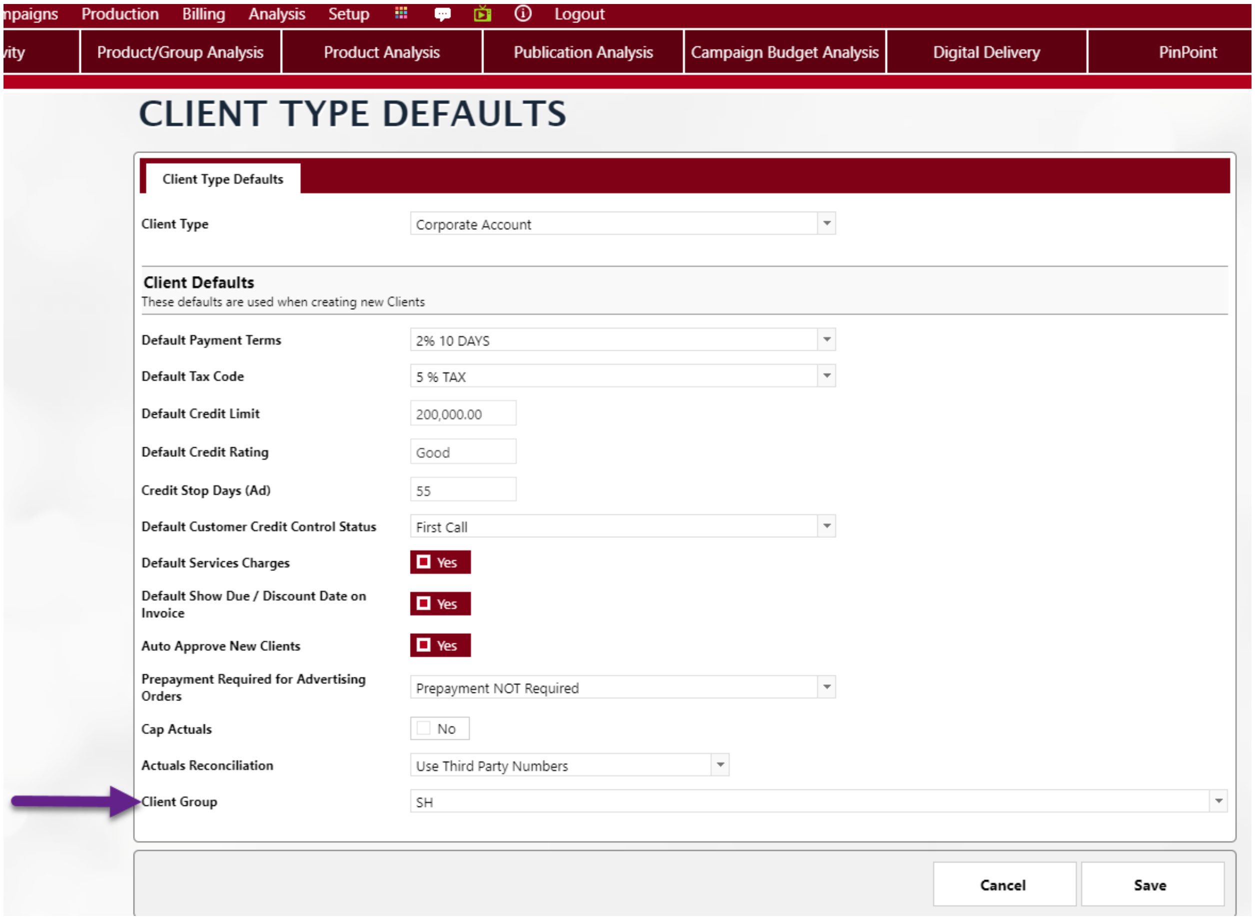
Navigate to the menu Customers -> Advertiser/ Agency Maintenance and choose an advertiser from the drop-down menu. Click the node A/R setup.



In the “Client Group(s)” field, choose one or more client group from the list and save. This is the fastest way to change an advertiser’s client group.

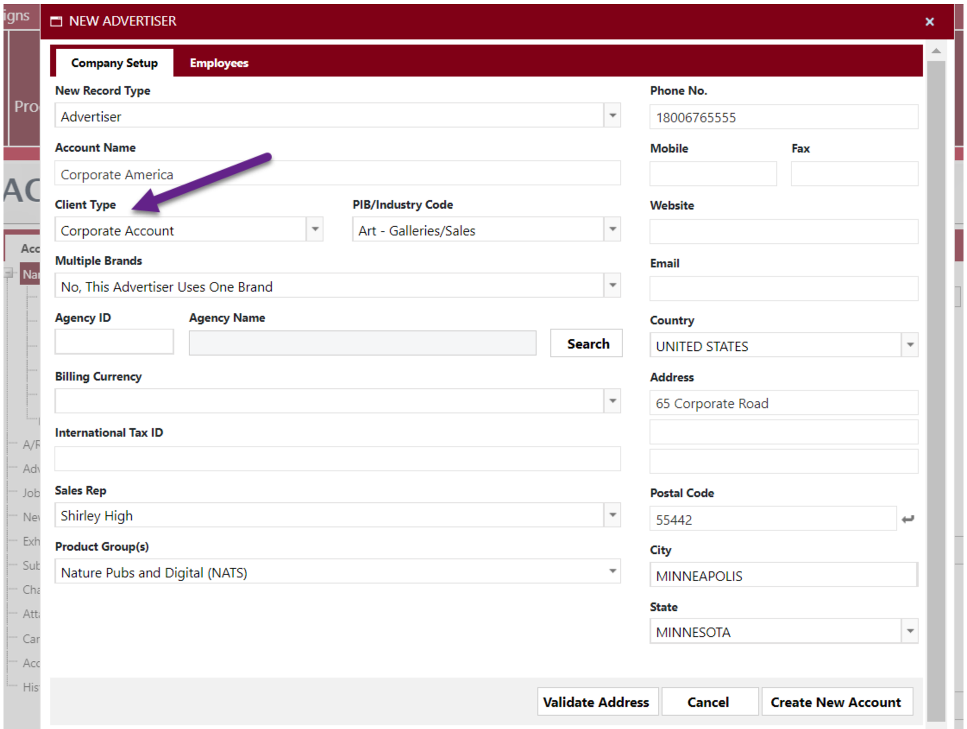
Client Default Type

Navigate to the Setup menu -> Client Type Default Setup.

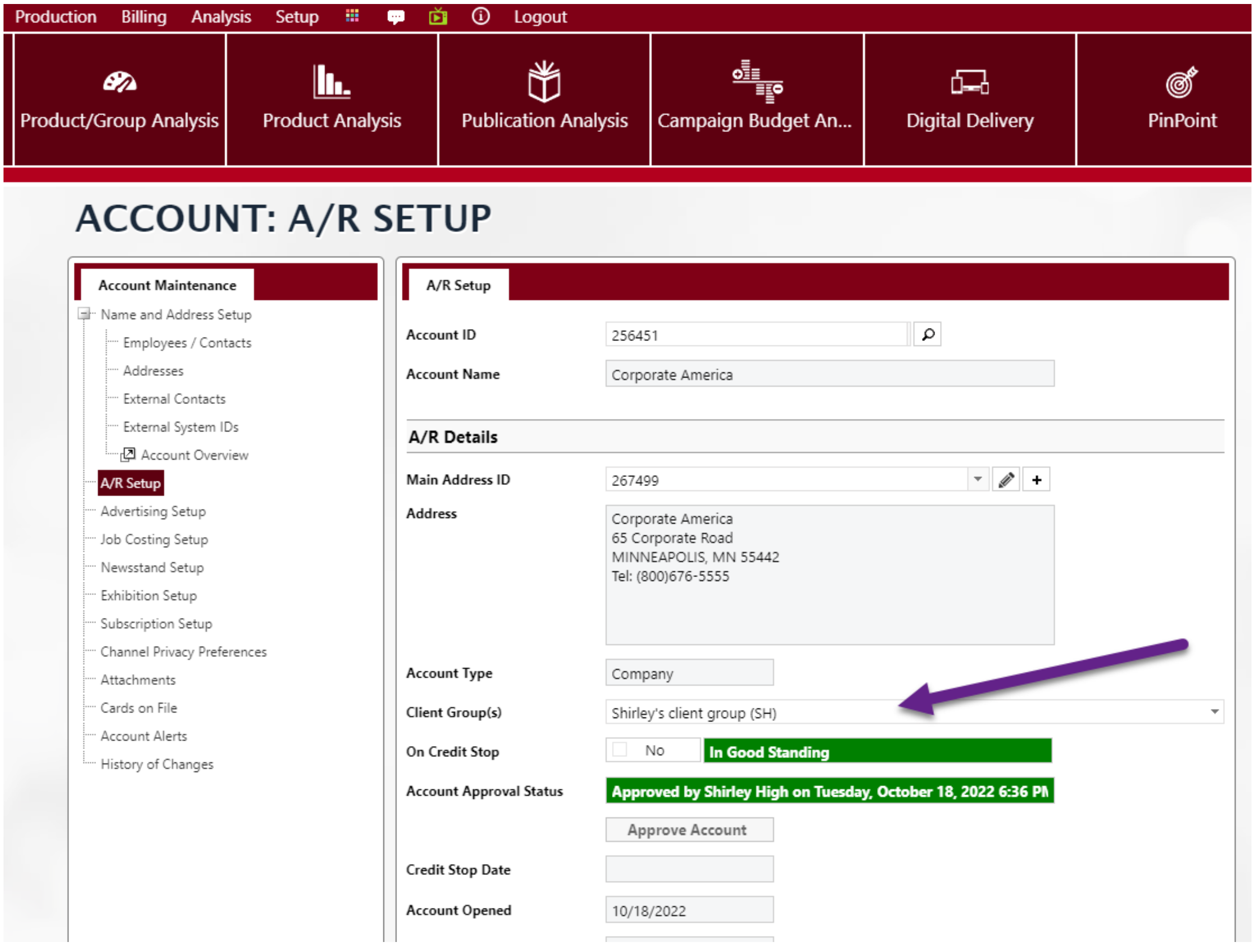


Choose the Client Type from the drop-down and scroll to the “Client Group” field and choose the default value. This group value is applied when you create a new advertiser and assign the account this Client Type.

Navigate to the menu Advertiser/ Agency Maintenance and click the + sign to create a new client. Choose this Client Type above.



Click the "Create New Account". Click the AR Setup node on the Advertiser Maintenance screen.



The Client Group defaults in the Client Group(s) field.

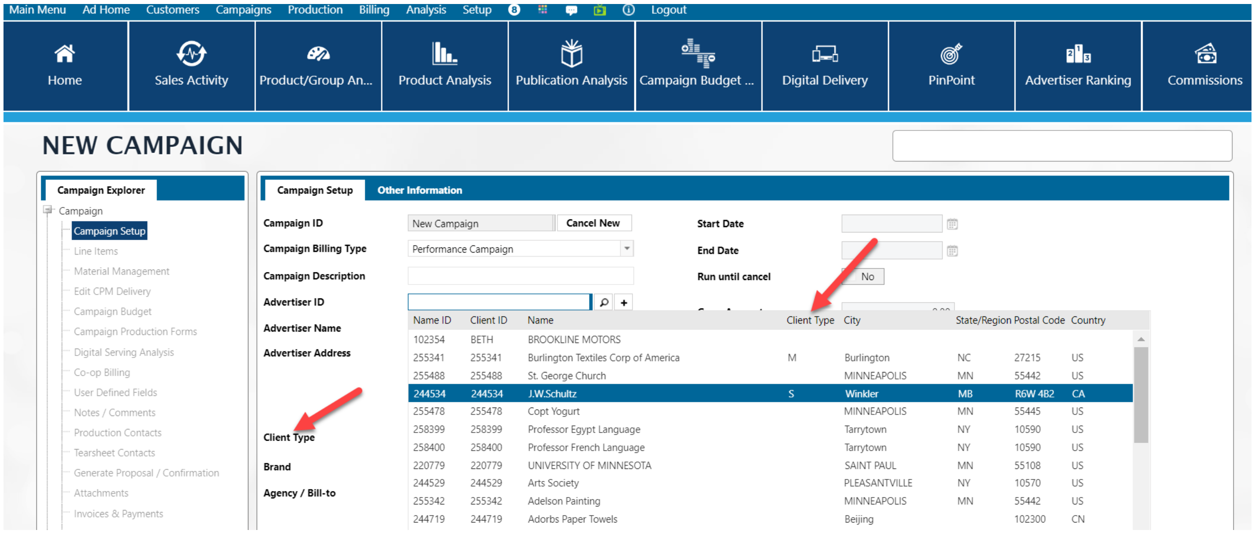
Client Type Display

Client Type is a field displaying now in multiple screens across the software. For example, in these screens:

- In quick search for a customer
- Campaign header main screen
- Campaign line item screen
- My orders/quick entry single line order entry screen

The Client Type values are derived from the Client Type Setup in the Setup menu.

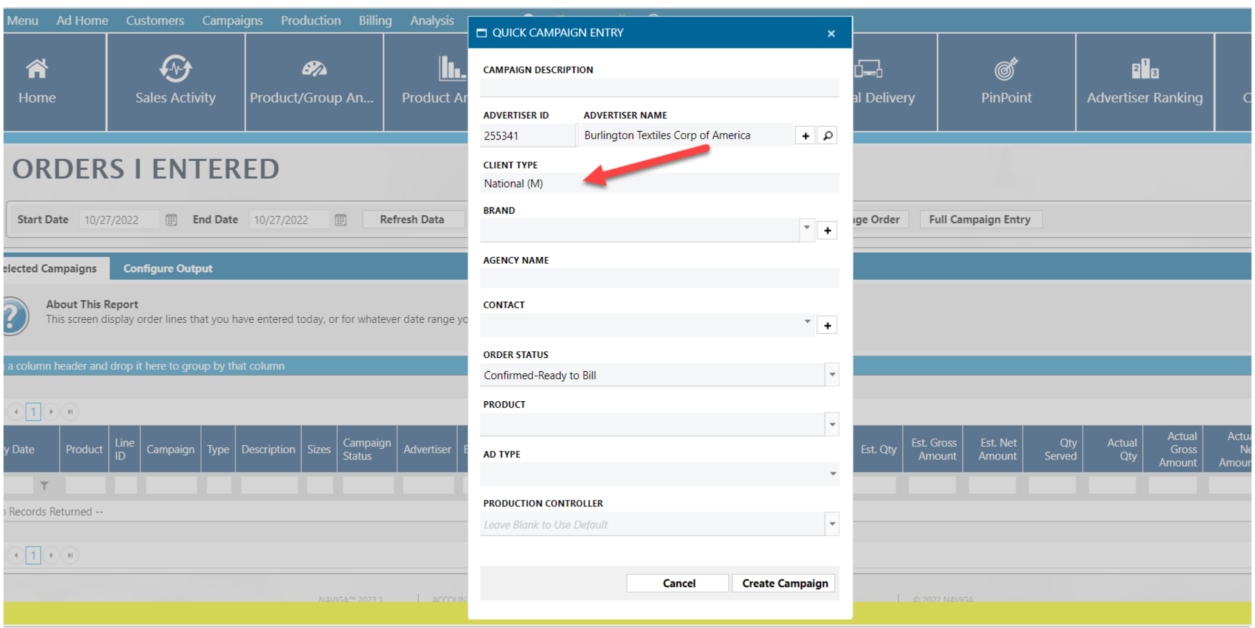
Navigate to the menu Campaigns -> Enter a New Campaign. When you click in the Advertiser ID field, note the Client Type listed.



The value is then displayed on the campaign screen.

Click the Line Items node and the Client Type field displays there as well.

Navigate to the menu Campaigns -> My Orders Quick Entry. Click the Advertiser ID field.

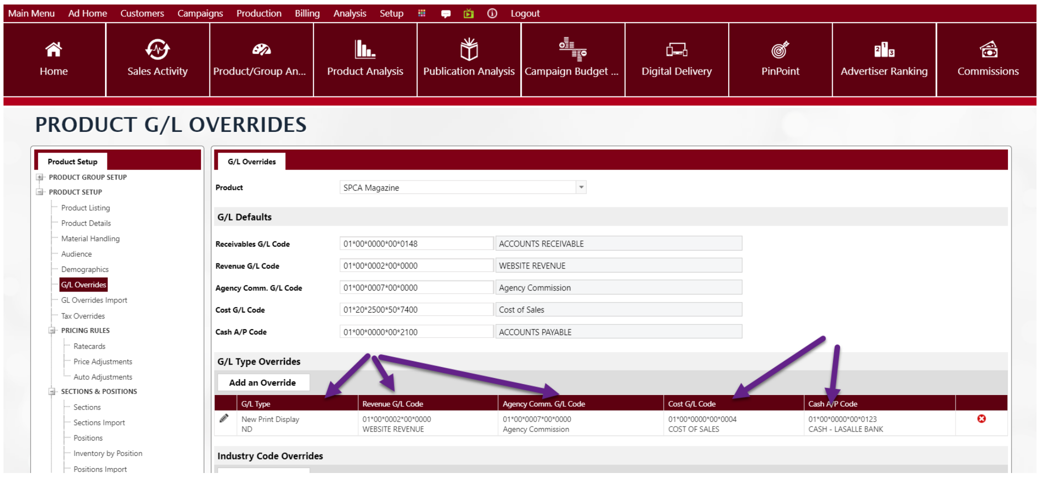


The Client Type displays.

Split Ratecard and Campaign Entry Line to Track Cost on Third Party Lines

Added fields to allow for splitting the Ratecard and campaign entry line to track cost on third party lines. User can override the Cost G/L code and the Cash A/P Code. This is applicable by the combination of the fields: G/L Type, Revenue G/L Code, and Agency Commission G/L Code. Once user adds the override, the invoices will show the GL code override breakdown in performance campaigns and the Journal entries will display it on confirmed flexible campaigns. Once user adds this Cost G/L Code, the Ratecard Line will show a Cost field. This Cost field's value user enters in the Ratecard line is the value shown in the Cost G/L Code override and Cash AP G/L Code override on the invoice and journal entry.

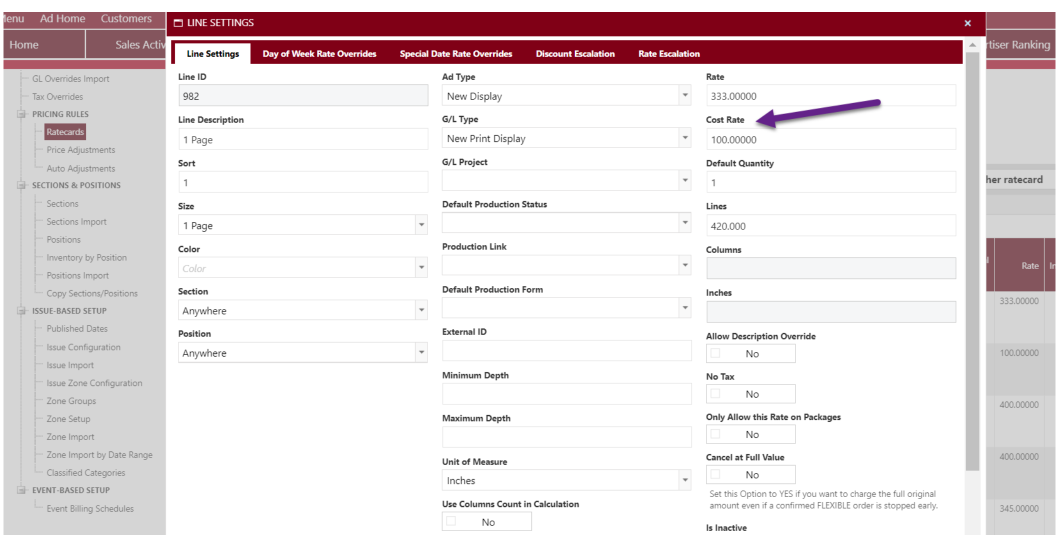
Navigate to the menu Setup -> Product Setup -> G/L Overrides. Select the Product from the drop-down list.



The G/L Defaults are listed for the Revenue, Receivables, Agency, Cost G/L and Cost AP Code.

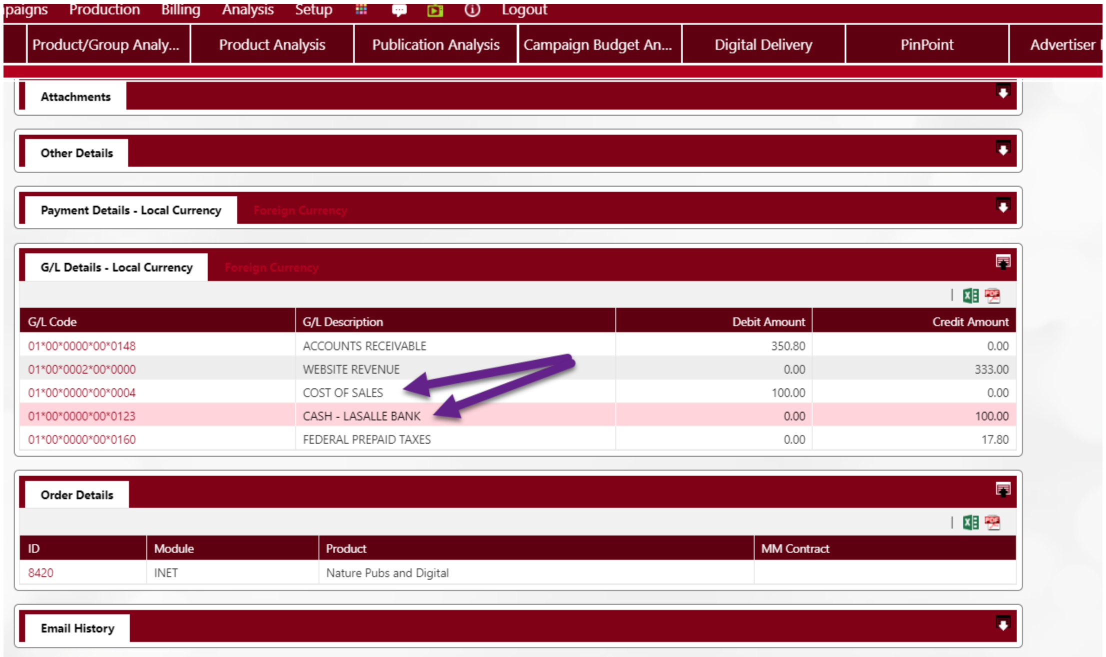
Edit the line under the G/L Type Overrides or click the Add an Override button and enter the G/L Type drop-down to choose the G/L type to which to apply this override. Enter the Revenue and Agency G/L codes which you'd like to apply. Enter the override Cost G/L Code and the Cash A/P Code. Save the settings.

Click the node "Ratecards" and choose the Ratecard and Ratecard line matching this G/L Type.

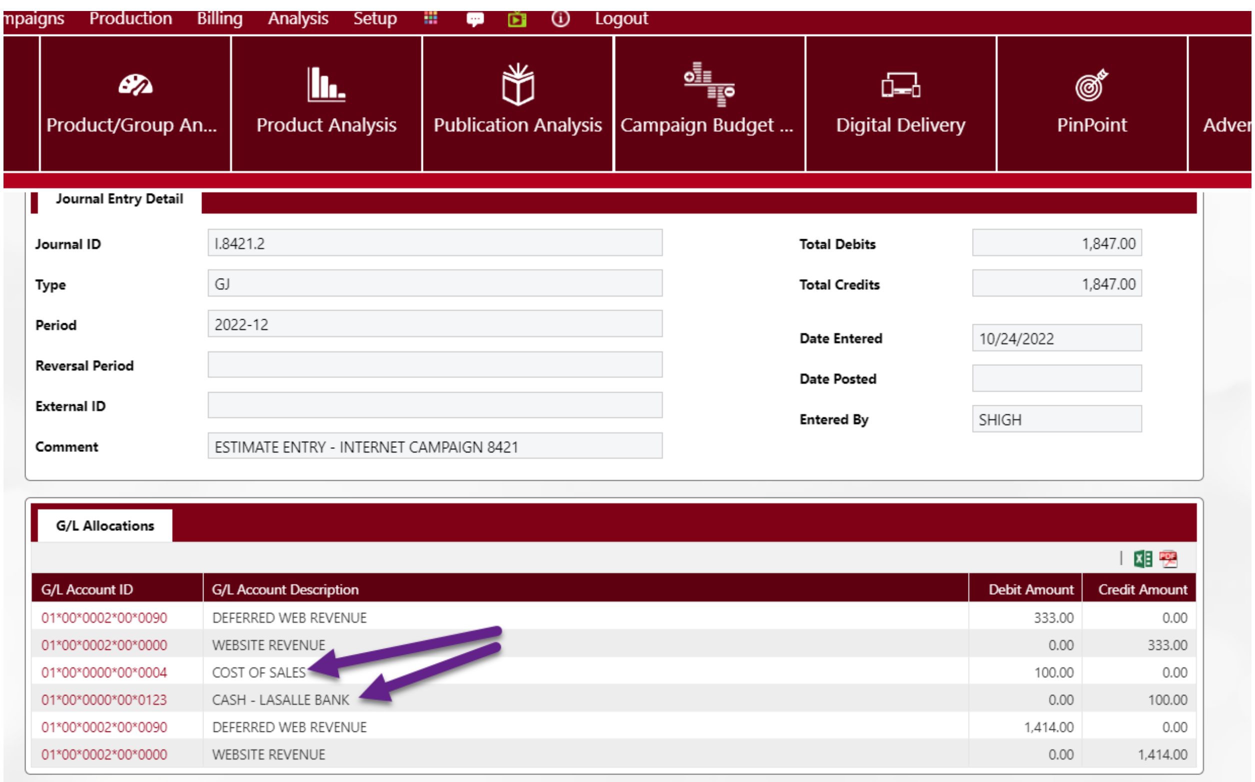


Enter the Cost Rate amount and save the Ratecard line.

Navigate to create a Performance campaign using this Ratecard line. Bill the campaign and view the Invoice GL breakdown.



Create a flexible campaign and confirm it. Click the Journal Entries node.



The overrides display with the Cost amount entered in the Ratecard line.

Advertiser Maintenance Billing Cap Amounts Options

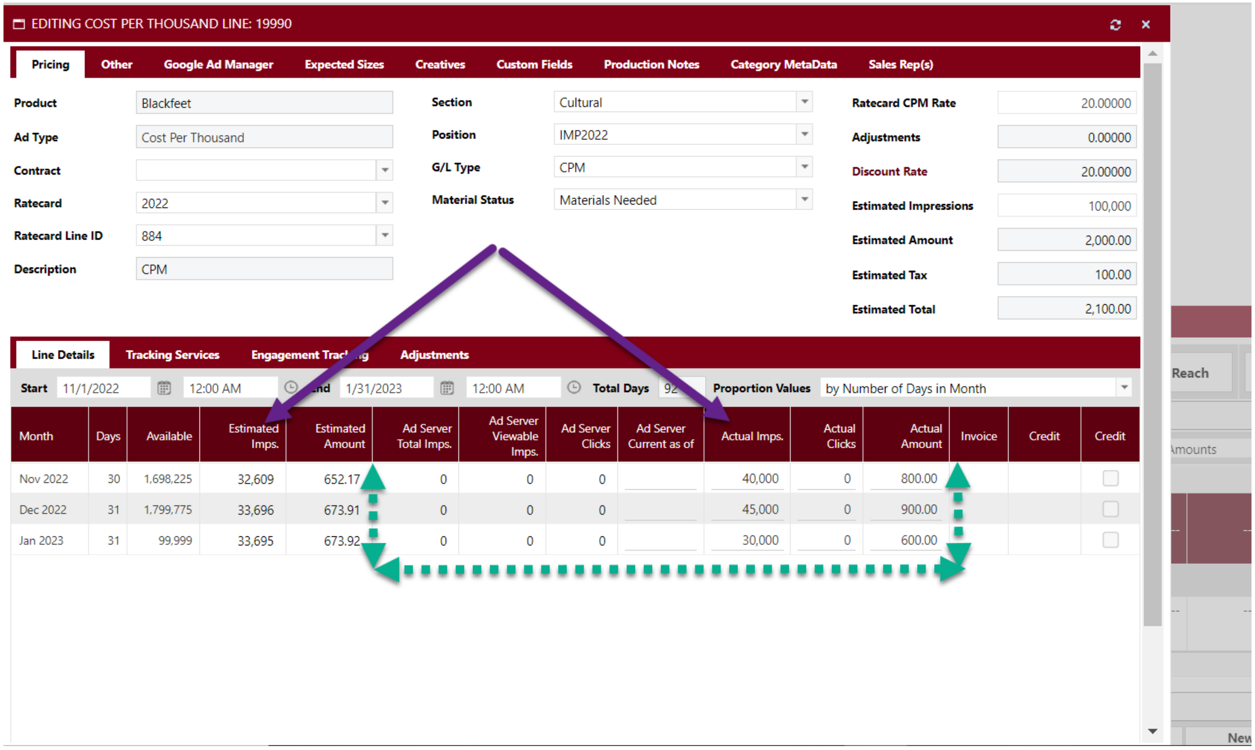
Added an option on the Advertiser Maintenance screen on the Advertiser Setup node for Cap Actuals. This changed from a Yes/ No option to the following three options:

1. No Caps: Meaning the amount billed to the advertiser is based on the actual count of impressions of the ad, regardless of the source being Ad Server Impressions, or Third Party and so forth.
2. Capped at Total Goal: Meaning there is a cap placed on the total amount on the campaign after entering and saving the actuals for all but the last line in the campaign. In this case, if the campaign is running over the course of several months, each month can be reconciled based on the actual impressions, except for the final month, which will be adjusted to add up to the campaign total amount regardless of the number of actual impressions in that month. So, the advertiser is not overcharged over the promised the campaign total.
3. Capped at Individual Monthly Goals: This option is the old "Yes" value on this field. It has every month actual amount capped regardless of actual impressions on a line. This results in the same amounts per month charged to the advertiser regardless of the actual impressions in that month.

Option 1. No Caps

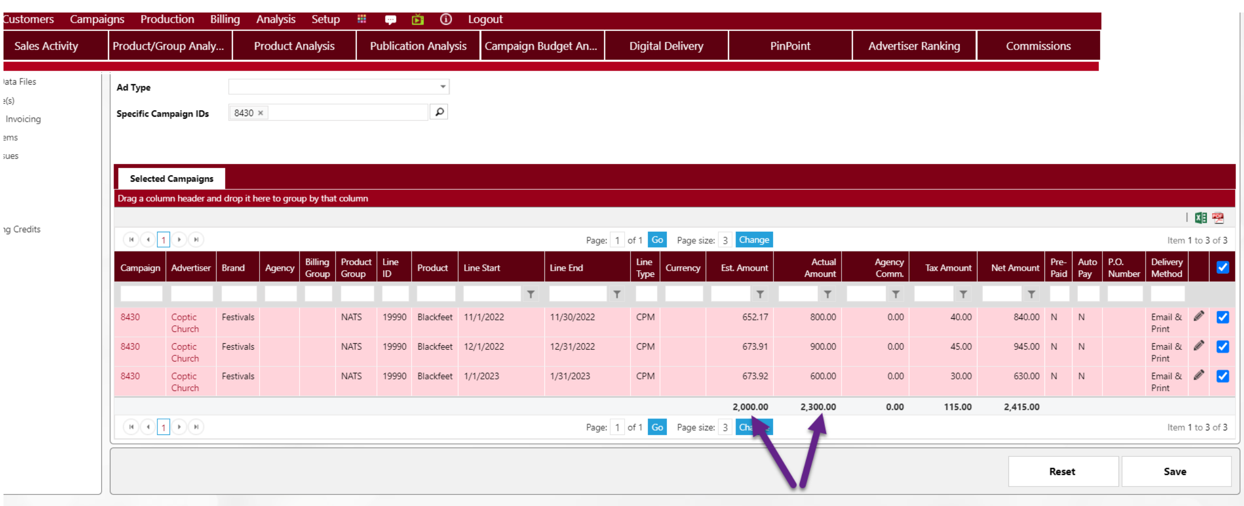
Navigate to the menu Customers -> Advertiser Maintenance -> Advertising Setup and choose a customer from the drop-down menu. Scroll to the section Advertising Billing and in the field "Actuals Billing Method" choose the option "No Caps". Save the settings.

Navigate to Campaigns -> Enter a New Campaign with a date range over several months. Use a digital product tied to an AD Server. Enter Cost Per Thousand ad type and save the line.



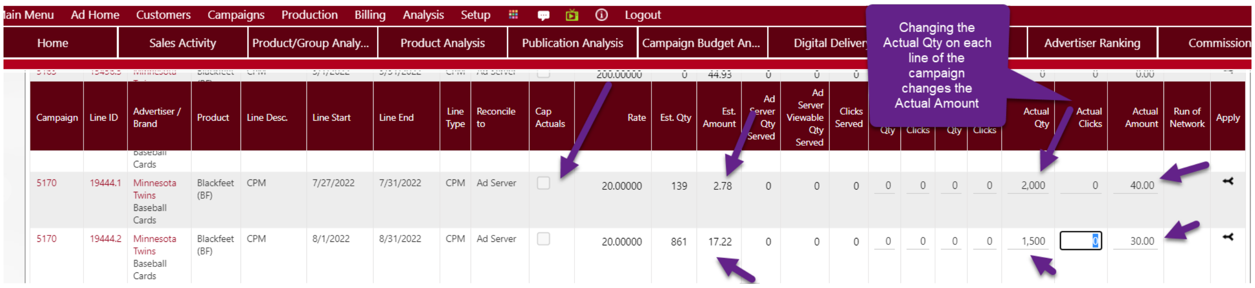
Edit the line and enter different actual impressions than the Estimated Impressions and note the different Actual Amounts calculated per line.

Confirm the campaign and generate an invoice through the menu Billing -> Prepare Performance Billing. Search on the campaign.



Note the Estimated Amount is different than the Actual Amount which is based on the actual impressions with no cap setting on the advertiser.

Same results occur from the menu Campaigns -> Reconcile Campaign Actuals. If you enter different numbers for the actuals, the amounts change accordingly to be reflected on the total amounts per line and for the total campaign.

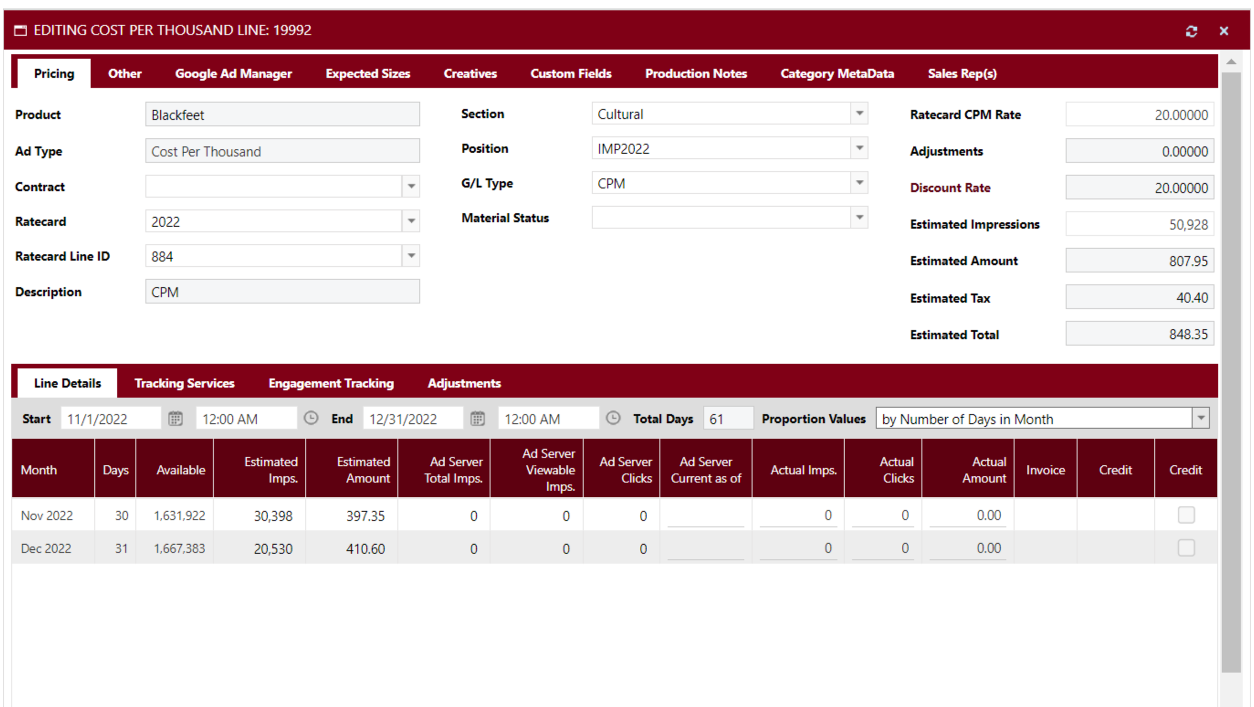


Note the flag for Cap Actuals is not checked because there's no cap on the account setup.

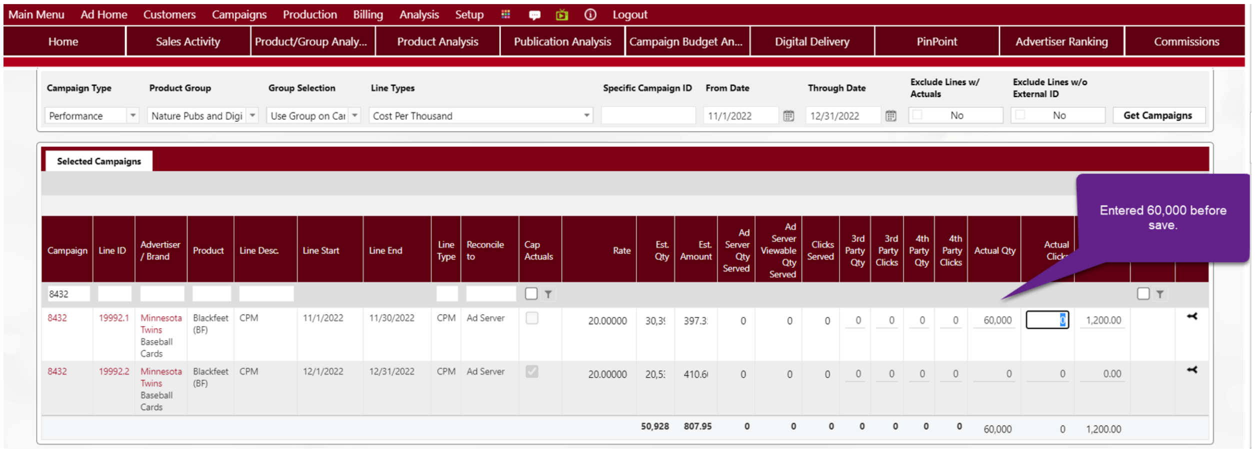
Option 2. Capped at Total Goal

Navigate to the menu Customers -> Advertiser Maintenance -> Advertising Setup node and choose the advertiser from the drop-down menu and set the field "Actuals Billing Method" to "Cap at Total Goal". Save the settings.

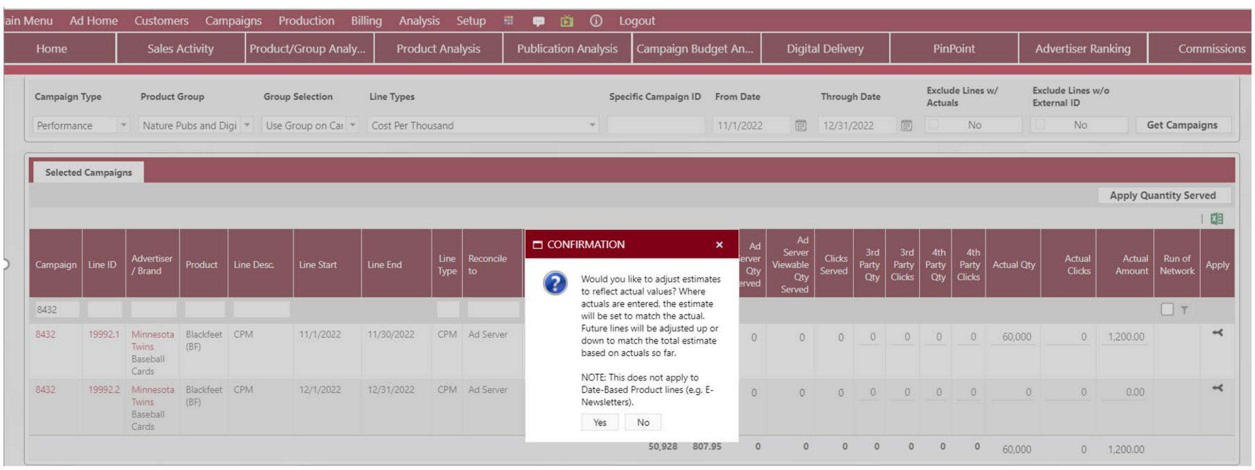
Create another campaign for this advertiser using the digital product connected to the AD Server and choose the campaign dates to run over the course of more than one month. Confirm the campaign.



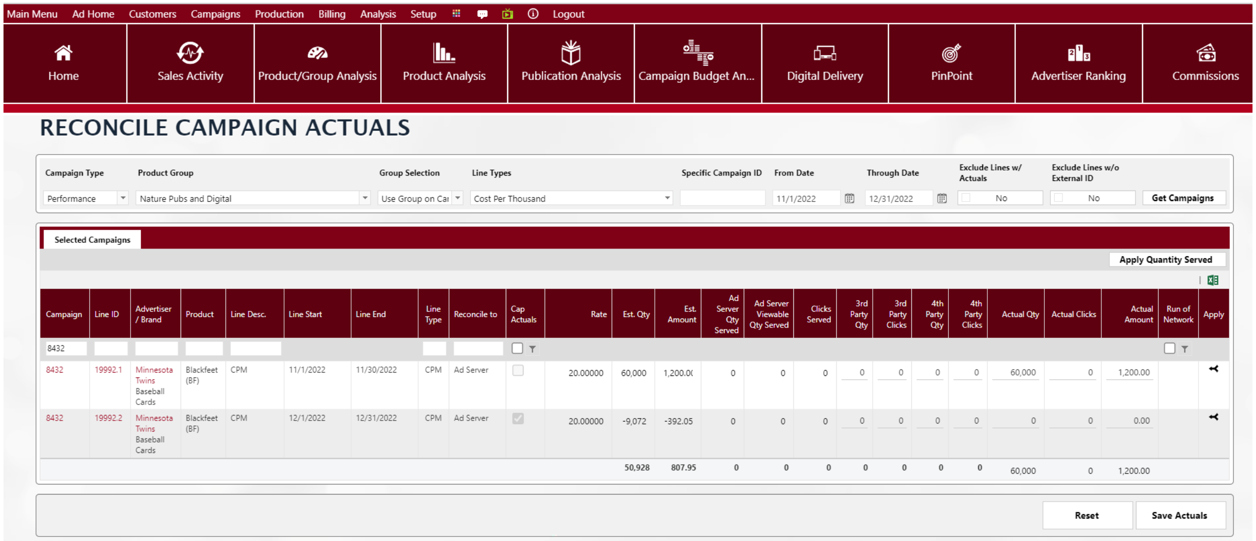
Navigate to the menu Campaigns -> Reconcile Actuals screen, add the first line actuals then save.



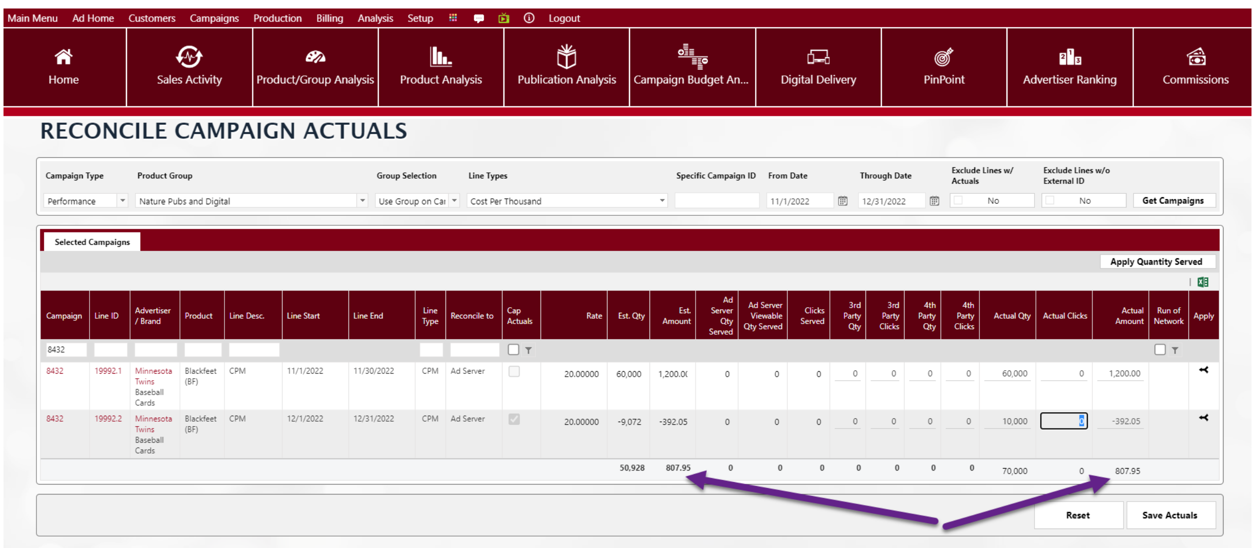
The system asks you if you like to adjust estimates to reflect actual values. Where actuals are entered, the estimate will be set to match the actual. Future lines will be adjusted up or down to match the total estimate based on actuals so far. Click Yes.



Then refresh the screen and search on the campaign again. If you have more than two lines, you can repeat until the line before last. The system will update the estimate on the last line so that the original total of the campaign line is maintained.



The final line no matter how much you enter as actual impressions, will not change to maintain the amount on the campaign as a total.



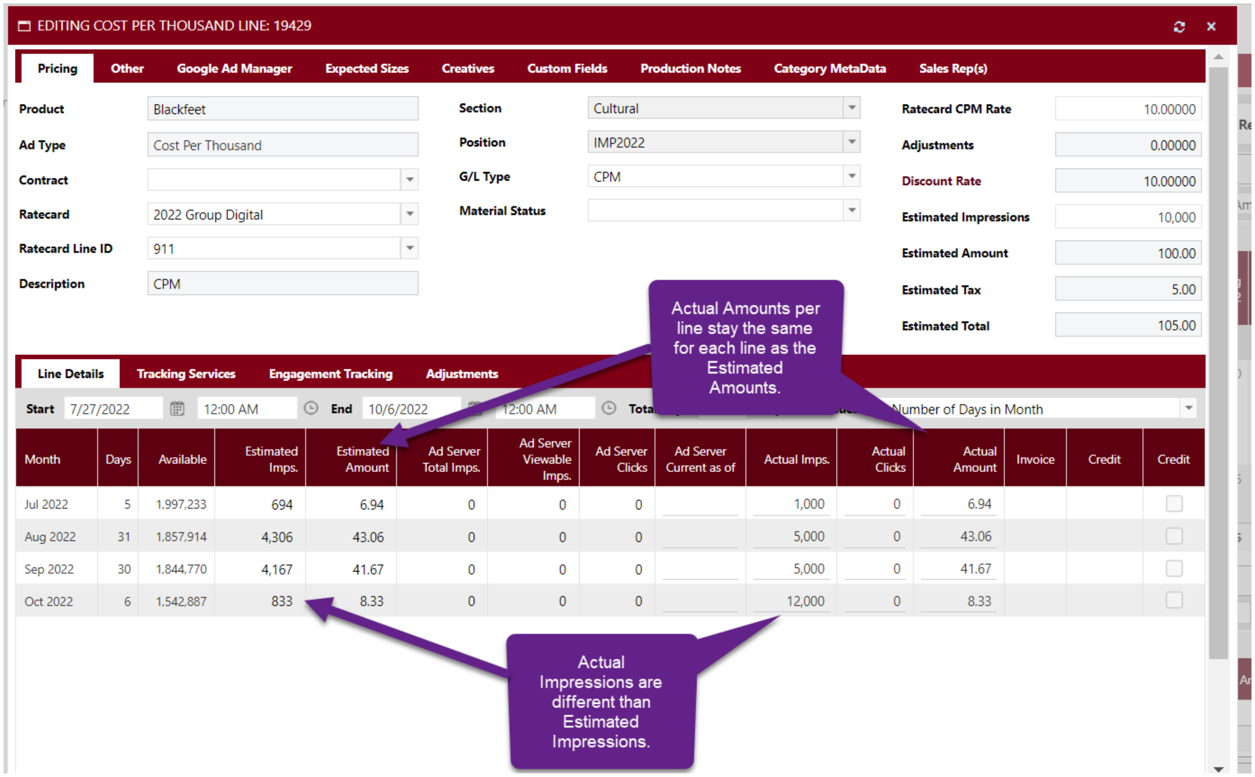
The total on the campaign remains the same so the advertiser is not charged to extra impressions.

Option 3. Capped at Individual Monthly Goals

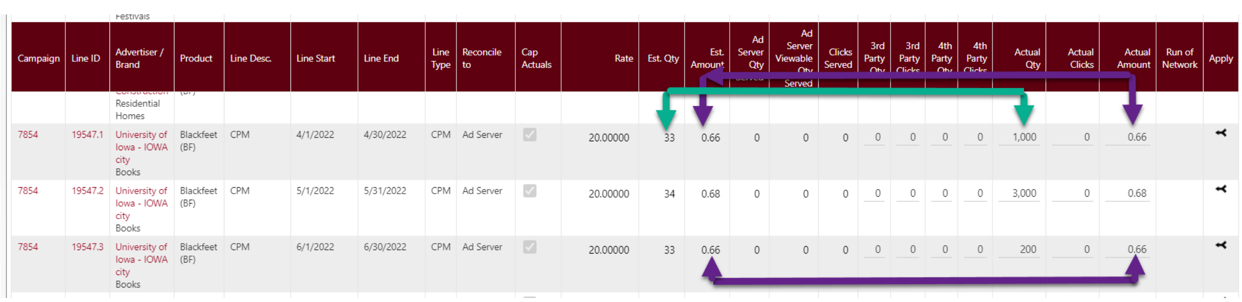
Navigate to the Advertiser Maintenance screen and choose another advertiser. In the Advertising Setup node, choose the option for Actuals Billing Method field to be "Capped at Individual Monthly Goals". Save the settings.

Navigate to create a campaign running over three months for this advertiser in a digital product connected to the AD Server.

Edit the campaign line item or navigate to the Actuals Reconciliation screen.



Change the Actual Impressions count on each line and note that the Actual Amount per line stays the same as the Estimated Amount.

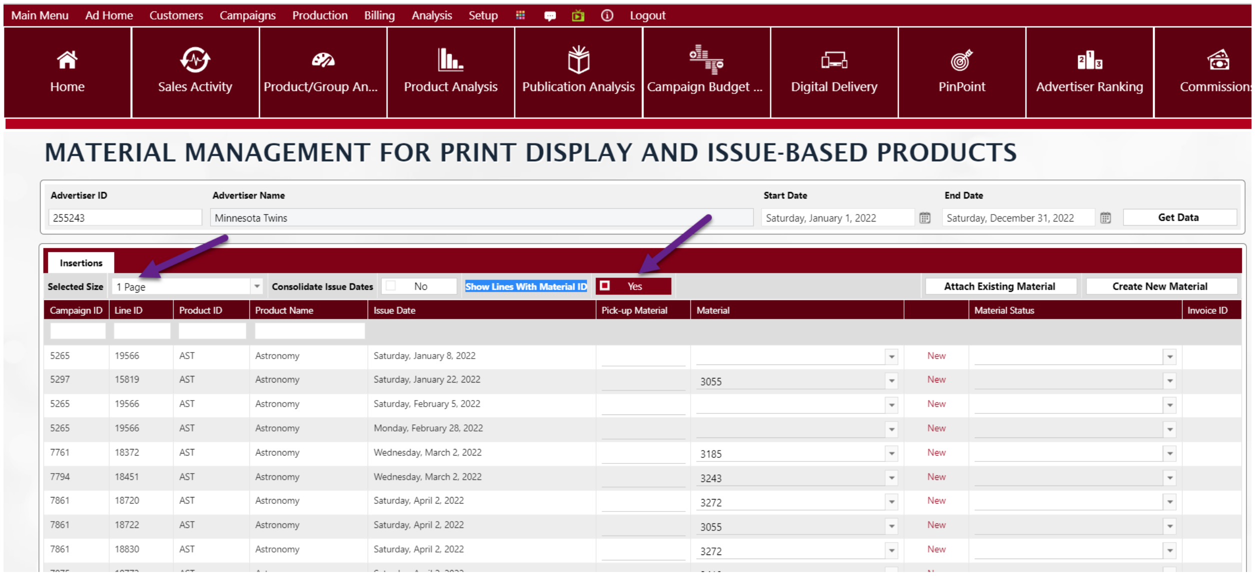


Same from the Reconciliation screen where you can enter any amount of actual impressions per line and it still will bill the customer the same amount based on the original campaign amounts.

Material Management Displays Lines with Material ID

Material Management screen has a new filter to show or hide Line Items with Material IDs already attached to the line.

Navigate to the menu Production -> Material Management. Search on an advertiser with a date range for campaigns running. The data displays.

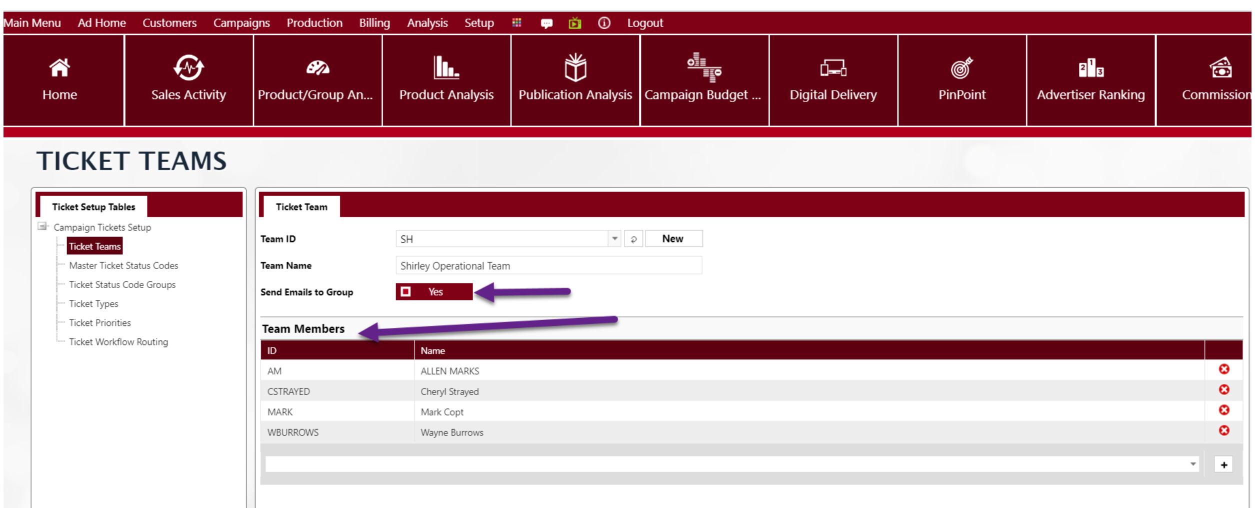


You can filter on the size and click the button "Show Lines with Material ID". The screen refreshes with the data. If the flag is set to "No" then the screen hides the records that have the Material IDs. This facilitates easy viewing and management of materials per line.

Tickets Email to Recipients

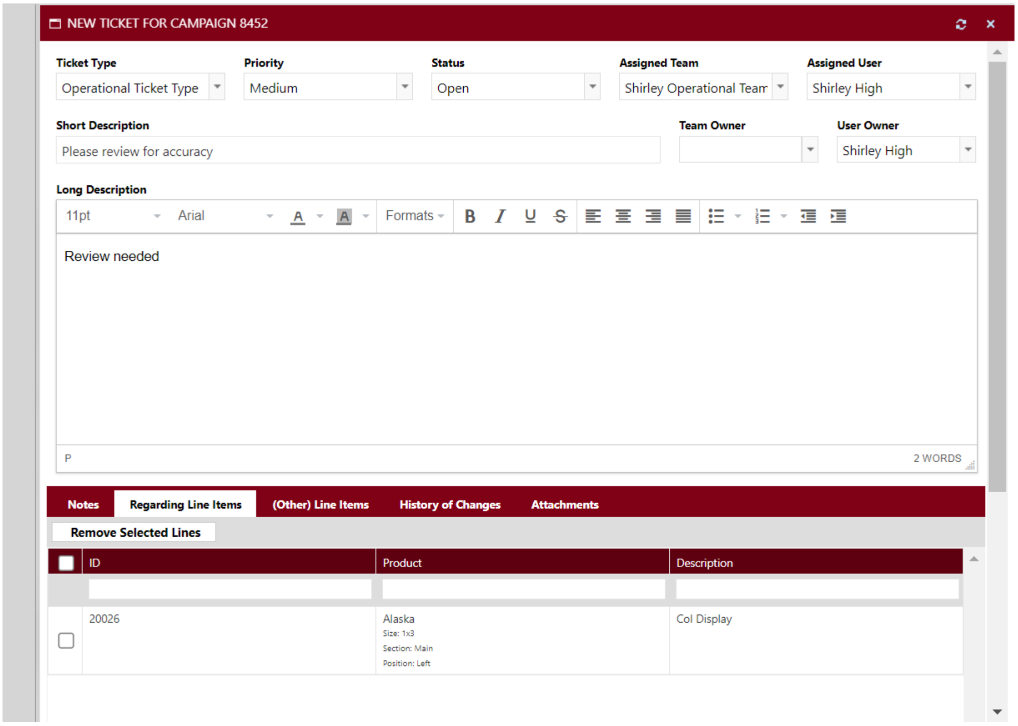
Tickets on a campaign have the ability to email tickets recipients to alert them to the need for their action on the tickets.

Navigate to the menu Setup -> Advertising Setup- > Ticket Type Setup -> Ticket Teams.



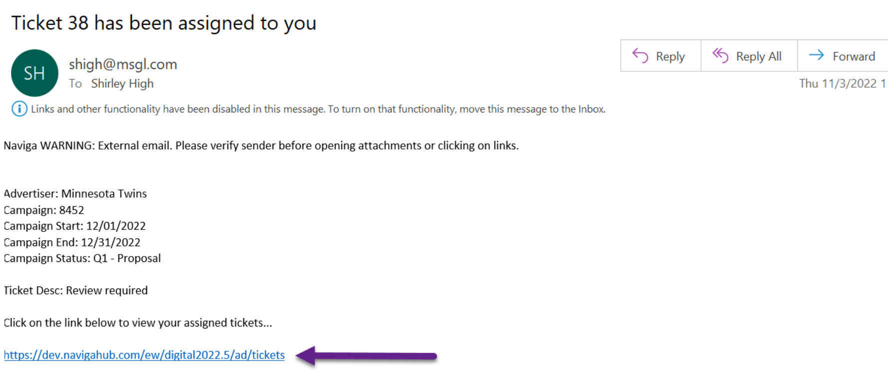
Search for the Team in the Team ID drop-down and check the flag "Send Emails to Group". Save the settings.

Create a new campaign and in the Line Items screen click the "Tickets" tab then click "New Ticket" button.

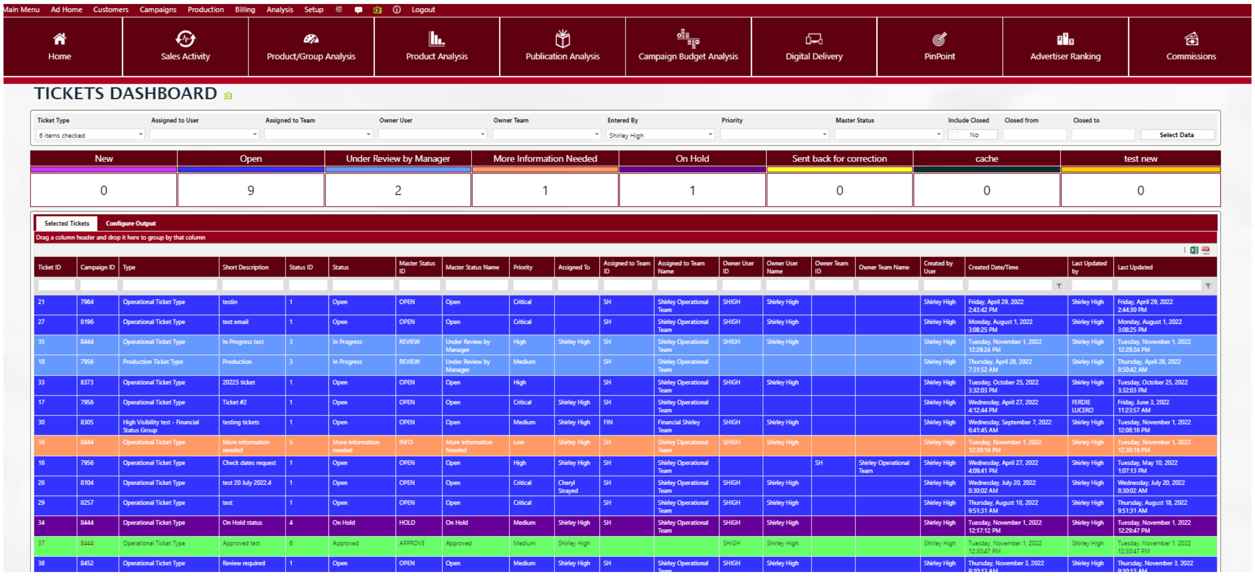


Enter the Ticket information including the type, assigned team group which you setup with emails above and select the Line Item(s) to attach to the ticket. Then click "Add Selected Lines".

The recipient then receives an email with the ticket information.



The email includes a link to click so that the recipient can be directed straight to the ticket dashboard after login.

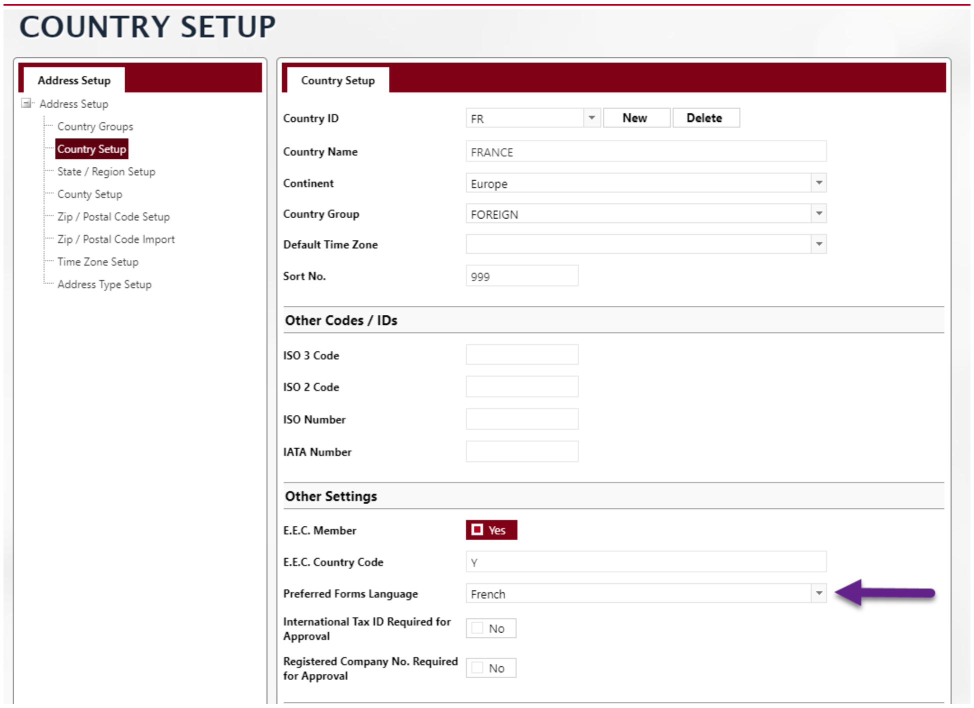


The recipient can then click the hyperlink to the ticket or the campaign ID depending on the configurable fields on the screen.

Preferred Forms Language

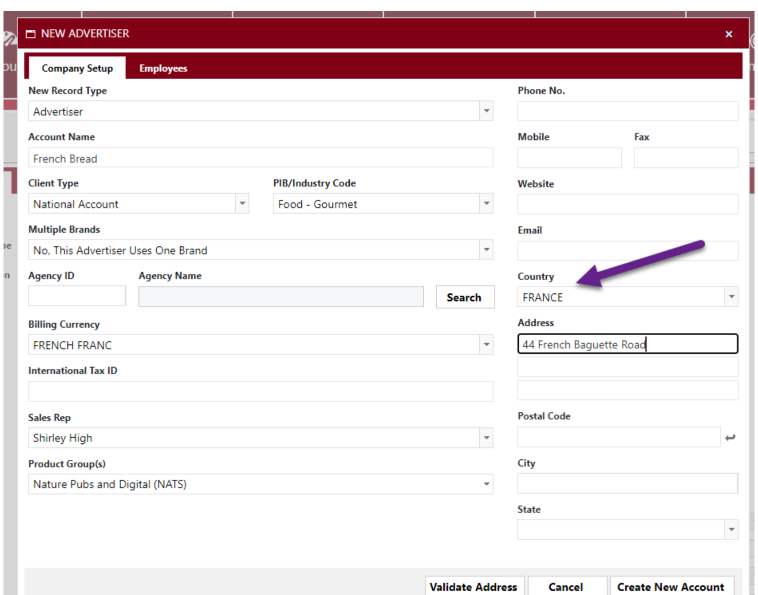
Country Setup screen includes a new field for Billing Forms Preferred Language. This is a default value chosen from the drop-down menu, for when a new customer is created in the system and the customer account's address is in a specific country, the billing forms language setup for this country defaults automatically in the account maintenance and the customer would have the billing forms generated in this language.

Navigate to the menu Setup -> System Tables Setup -> Address Setup. Choose a country from the drop-down menu.

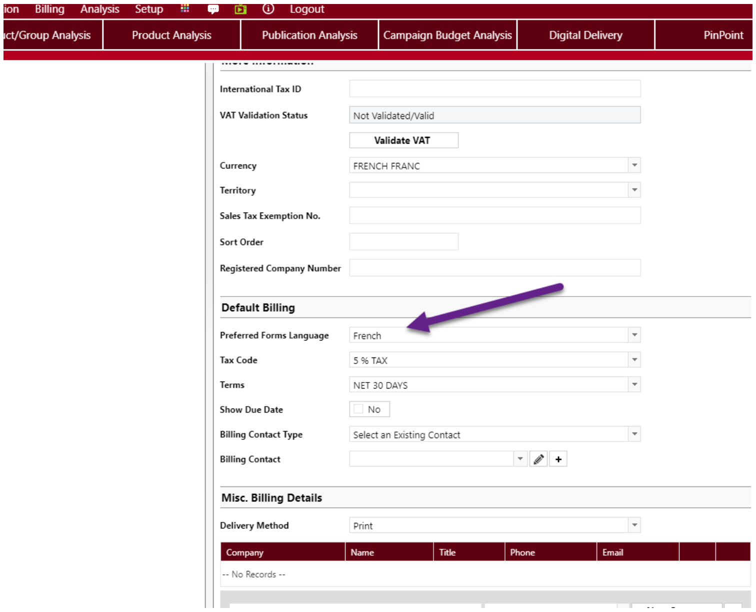


In the field "Preferred Forms Language" choose from the drop-down field values the language matching the country's language and save the settings.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance and click New. Create a new customer with an address and country as per your choice in the Country Setup menu.



Once finished creating the account, click the node A/R Setup on the Account Maintenance screen.

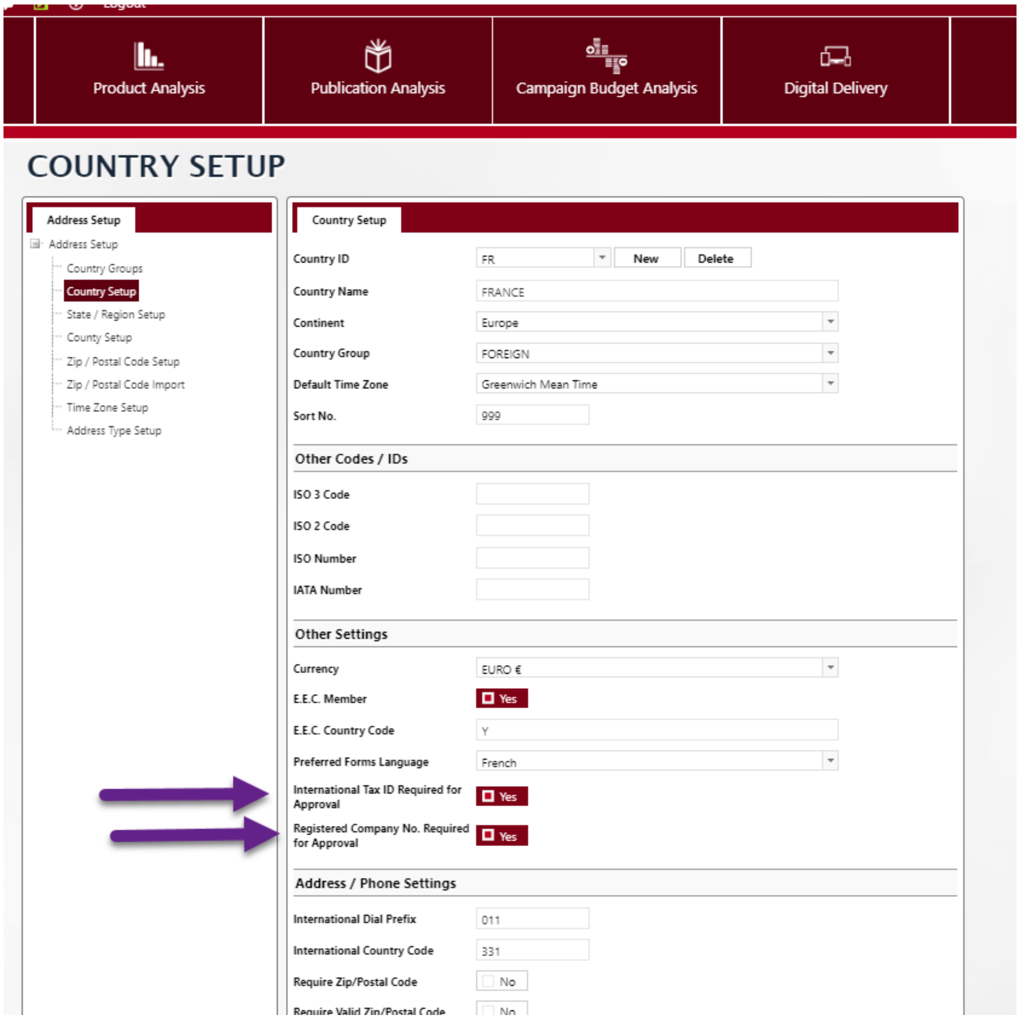


Scroll to the Default Billing section and note the Preferred Forms Language displays there. You can now proceed to create a campaign and bill it. The billing forms will all display in this language.

"International Tax ID Required for Approval" and "Registered Company No. Required for Approval" Mandatory for Approval of Advertisers

Setup of country allows for requiring mandatory fields "International Tax ID Required for Approval" and "Registered Company No. Required for Approval", which when activated will mandate approval of account in this country and providing these two fields in the account maintenance screen, before confirming campaigns for this account. System allows for user to be redirected from campaign confirmation screen to approval of account. Entry of a campaign directly in confirmed status is not possible if account approval is missing.

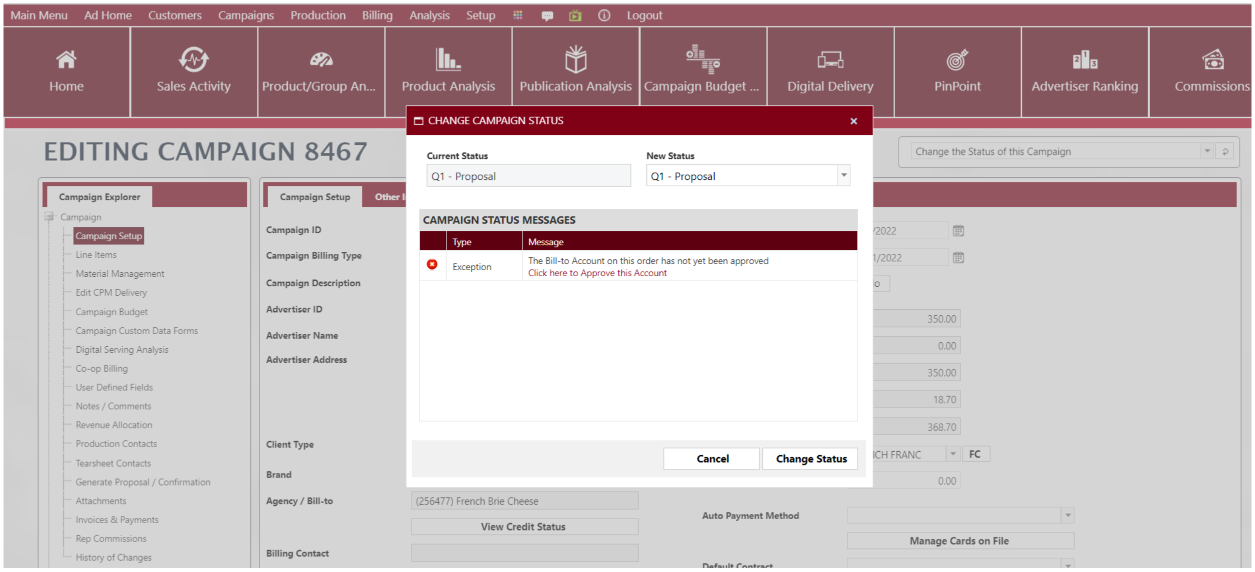
Navigate to the menu Setup -> System Tables Setup -> Address Setup. Click the node "Country Setup" node.



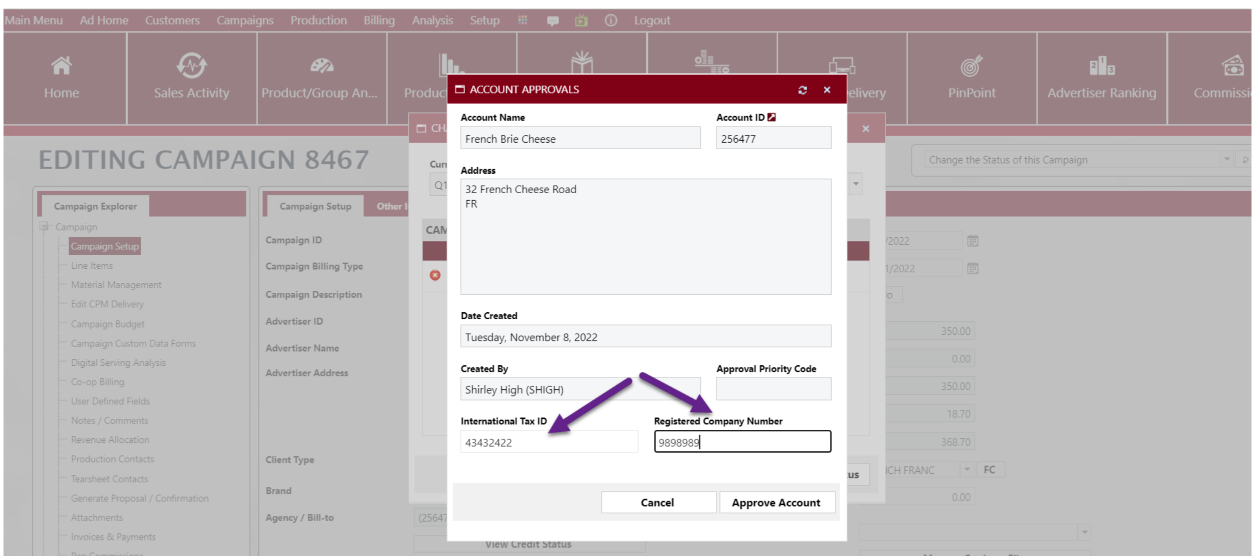
Search for the country which requires the fields(s) to be required that these fields are filled in for client approval. Check the flag for one or both of these fields as needed: “International Tax ID Required for Approval” and “Registered Company No. Required for Approval” to change their values to “Yes” and save.

Navigate to the Campaigns -> Create a New Campaign. Click the + to create a new advertiser. You can also create the new account in the menu Customers -> Advertiser/ Agency Maintenance and create a new account in this country above. Do not enter values for the International Tax ID or the Registration ID found in the Advertising Setup node on the Advertiser Maintenance screen.

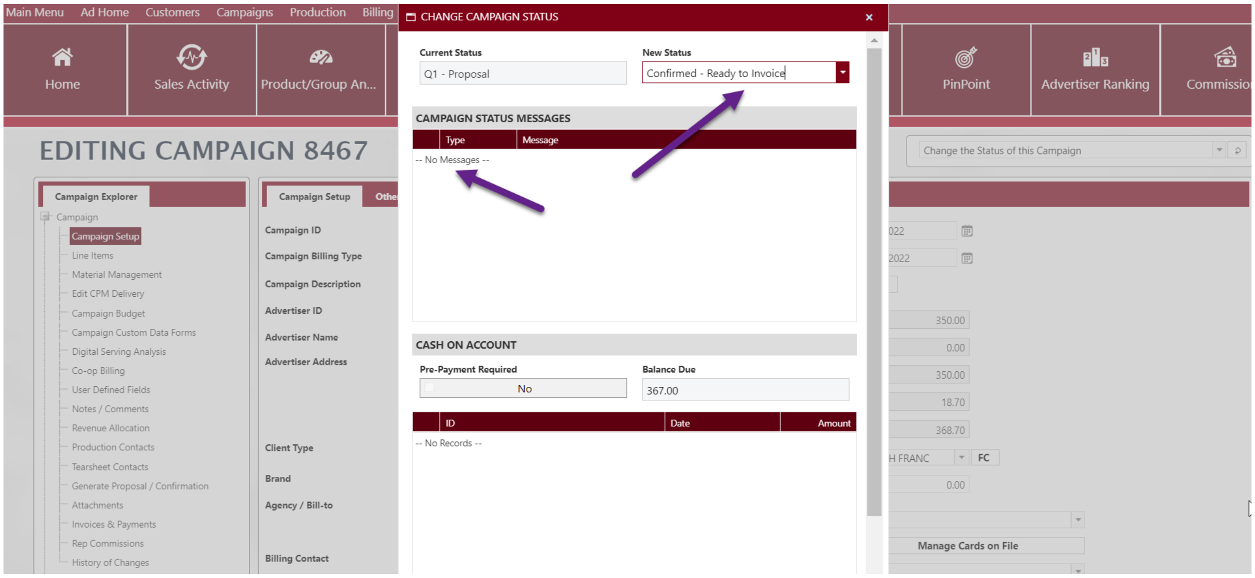
Proceed to create the campaign in the Quote or Reserved status.



Click the Edit drop-down on the campaign header screen to change the status of the campaign to the Confirmed Status. The pop-up screen displays, and the Confirmed status is not an option. But the screen has a link in the Exception message to click to approve the account.

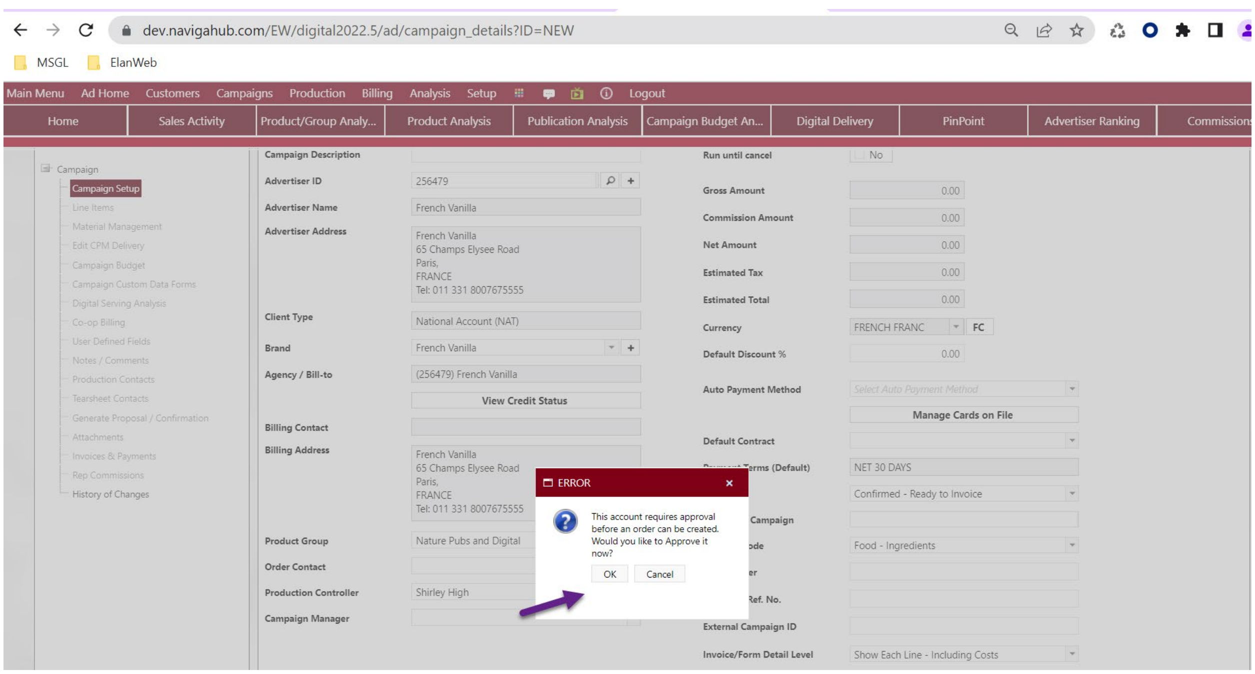


Enter the International Tax ID and or the Required Company Number, whichever field you made mandatory for approval. Click “Approve Account” and then click OK to the success message.

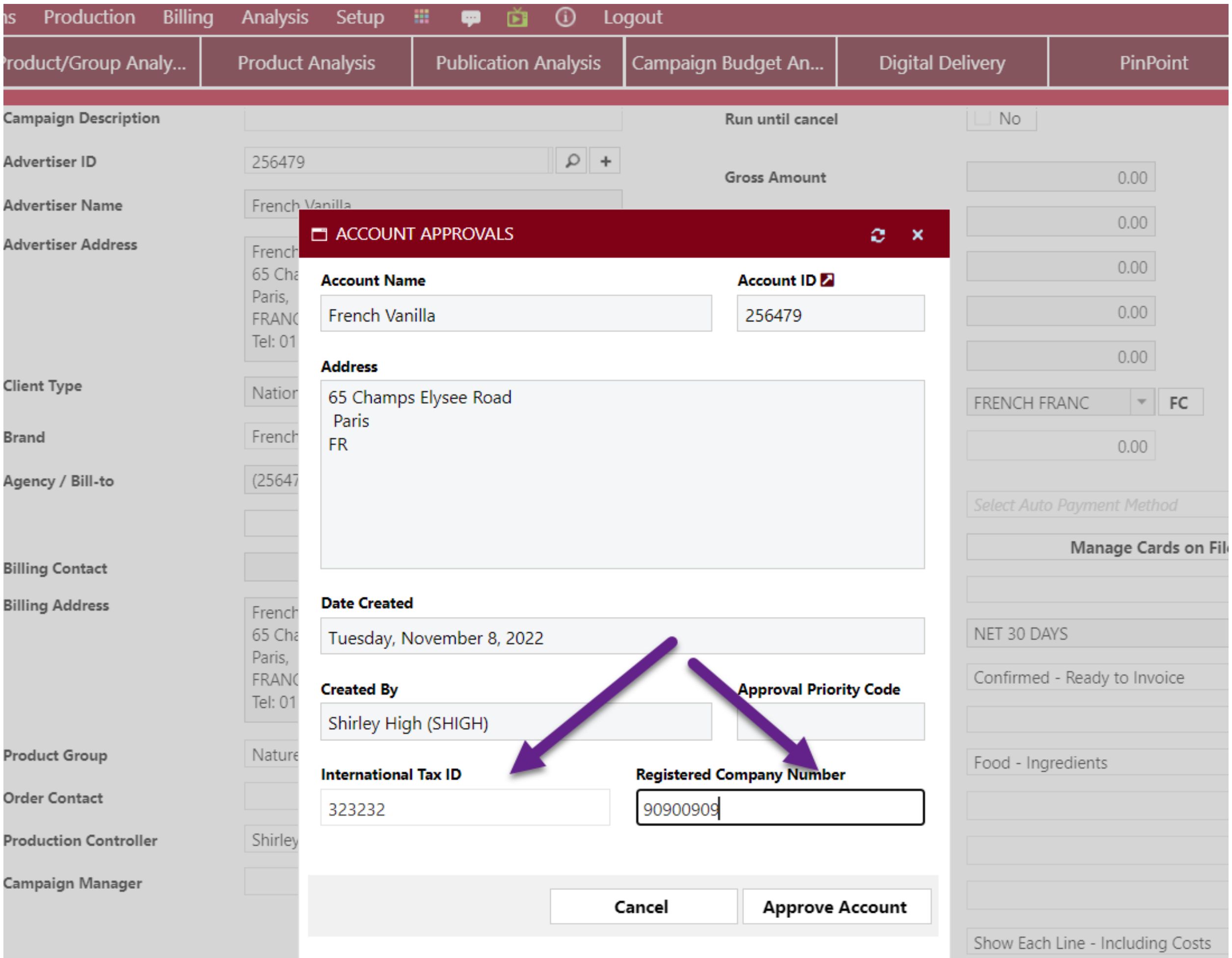


The system returns you to the status change screen. Now you can choose the Confirmed status and no error messages display.

If you attempt to create a campaign in a confirmed status for the account without entering this information, the system will not allow you to save the campaign.

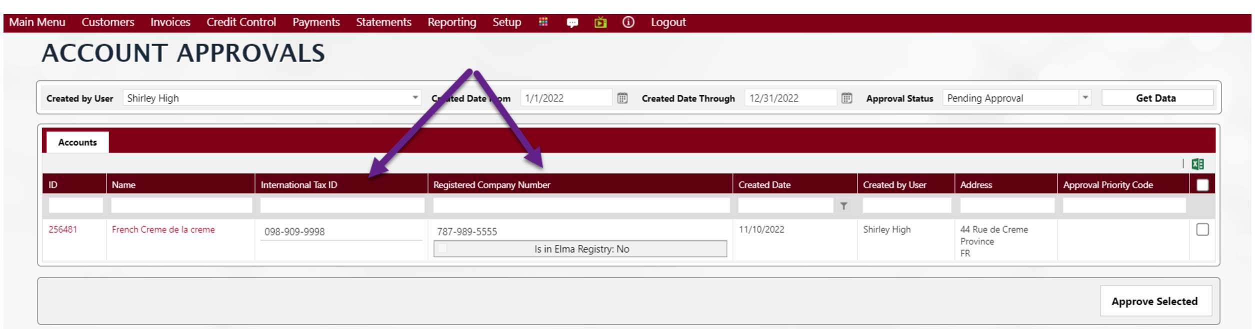


The message alerts you to the approval required and asks you if you'd like to be directed to the approval screen. Click OK.



Enter the required fields and Approve Account. Then the system will proceed to the line Item entry screen.

Account Approval screen in Customers menu contains reference to International Tax ID and Registered Company Number for customers in countries where this is applicable. User can enter the information in the screen and approve the account at the same time.

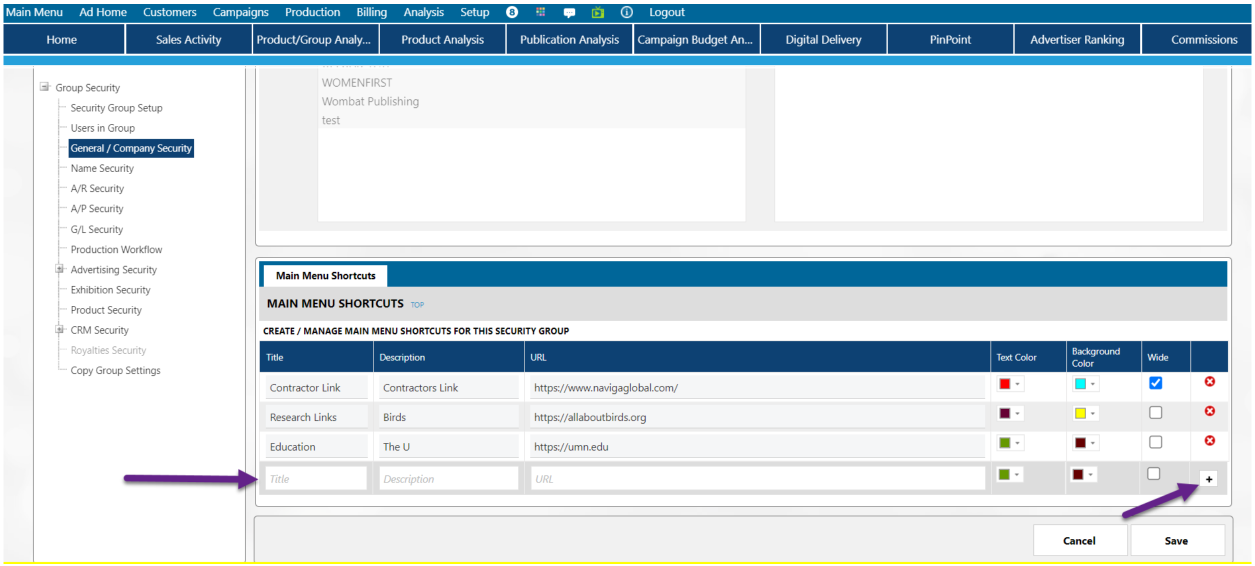


You can enter the international Tax ID and Registration number and then check the box and approve selected.

Shortcut Menu Tiles to External Sites

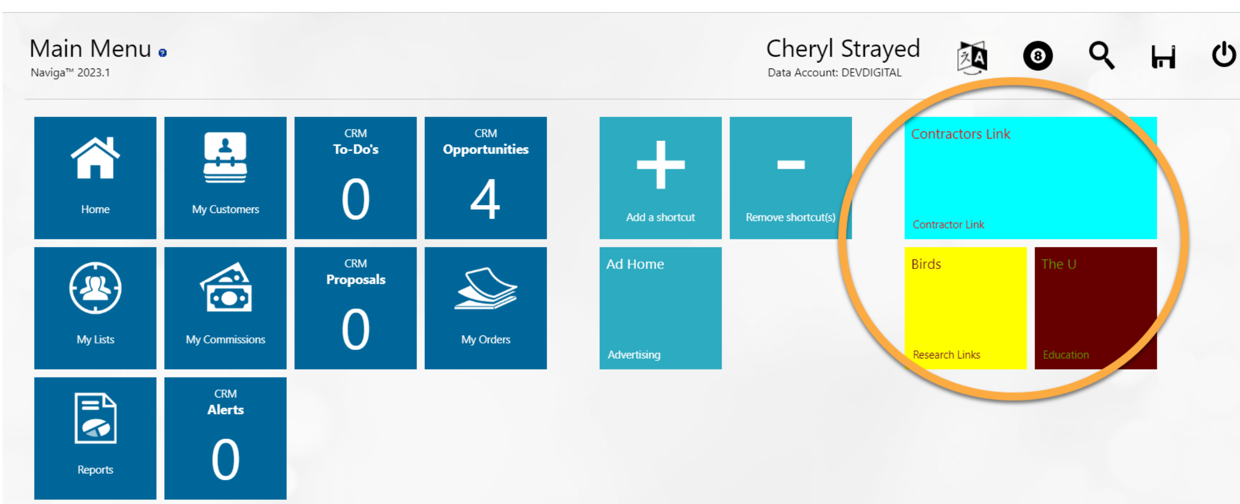
Administrators can create external website shortcut tile links on the Main Menu screen for a whole group to view and click similar to creating shortcut tile to Advertising or any module menu.

As an admin, navigate to the menu Setup -> Admin -> Group Security -> General/ Company Security. Choose the group from the drop-down which will see this link.



Scroll to the bottom section "Main Menu Shortcuts" and enter a Title, Description, and URL which can be internal or external to your organization. Choose the text color and background color from the palette and then check the box for "Wide" if you'd like the icon to be large. Click the + to add the line. Repeat as needed and then click Save. Note that all members of the group upon logging in will see these links.

Login as a member of this group.

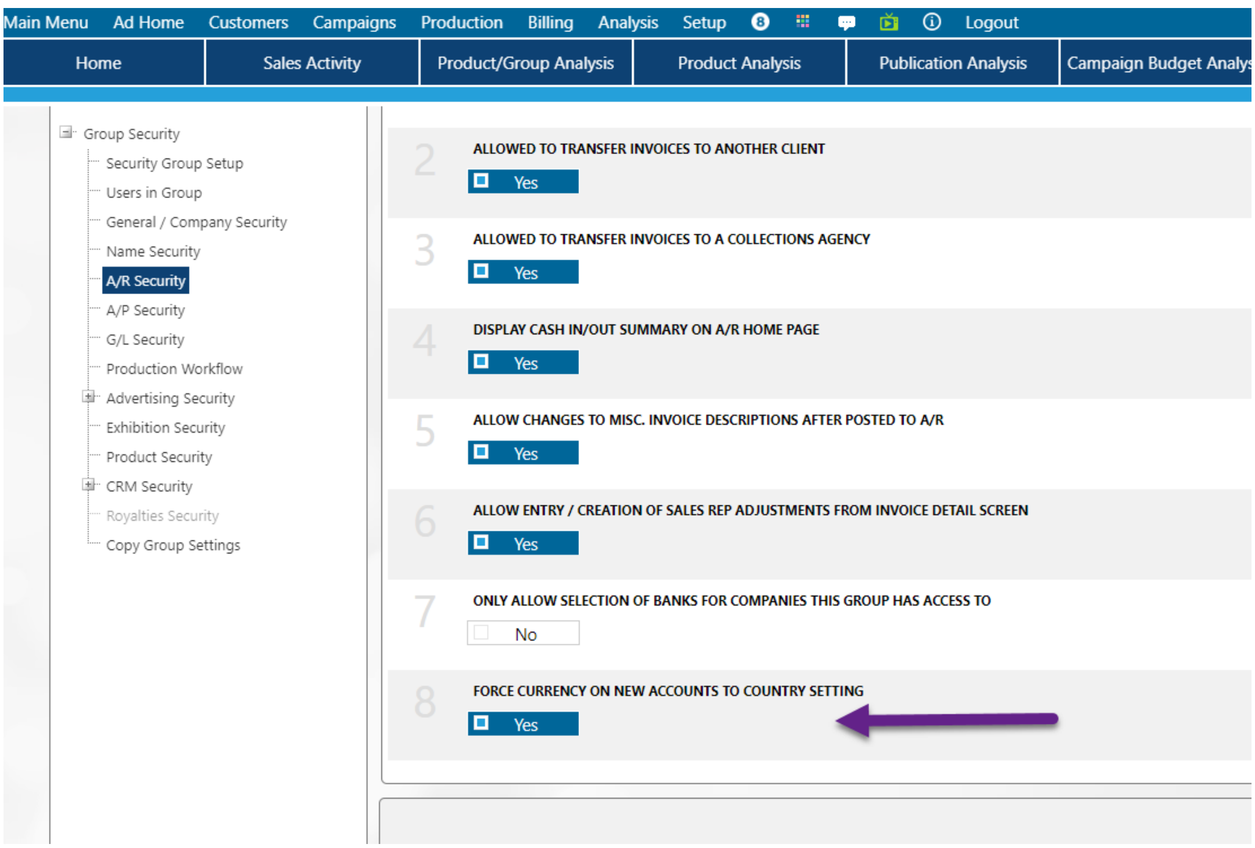


On the Main Menu now all users of this group will be able to click these links to direct them to the respective websites.

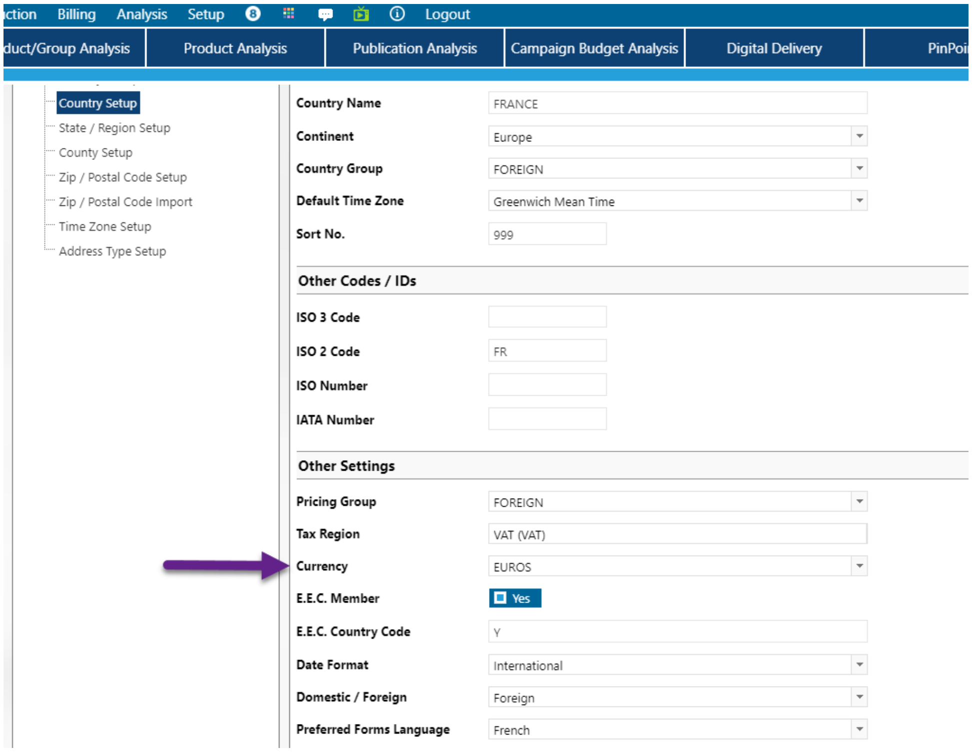
Currency Security on Country Setting

Force Currency on New Accounts to Country Setting: If this flag is set to “Yes”, then in the various places where you create a new account, if this flag is set, it will select the Currency from the Country settings for this advertiser account. Also, in Full Name Maintenance the Currency Option will be disabled if this new security flag is set.

Navigate to the menu Setup -> Admin -> Group Security -> A/R Security -> Other Security. Check the flag “Force Currency on New Accounts to Country Setting” to have a value of “Yes”. Save the settings.

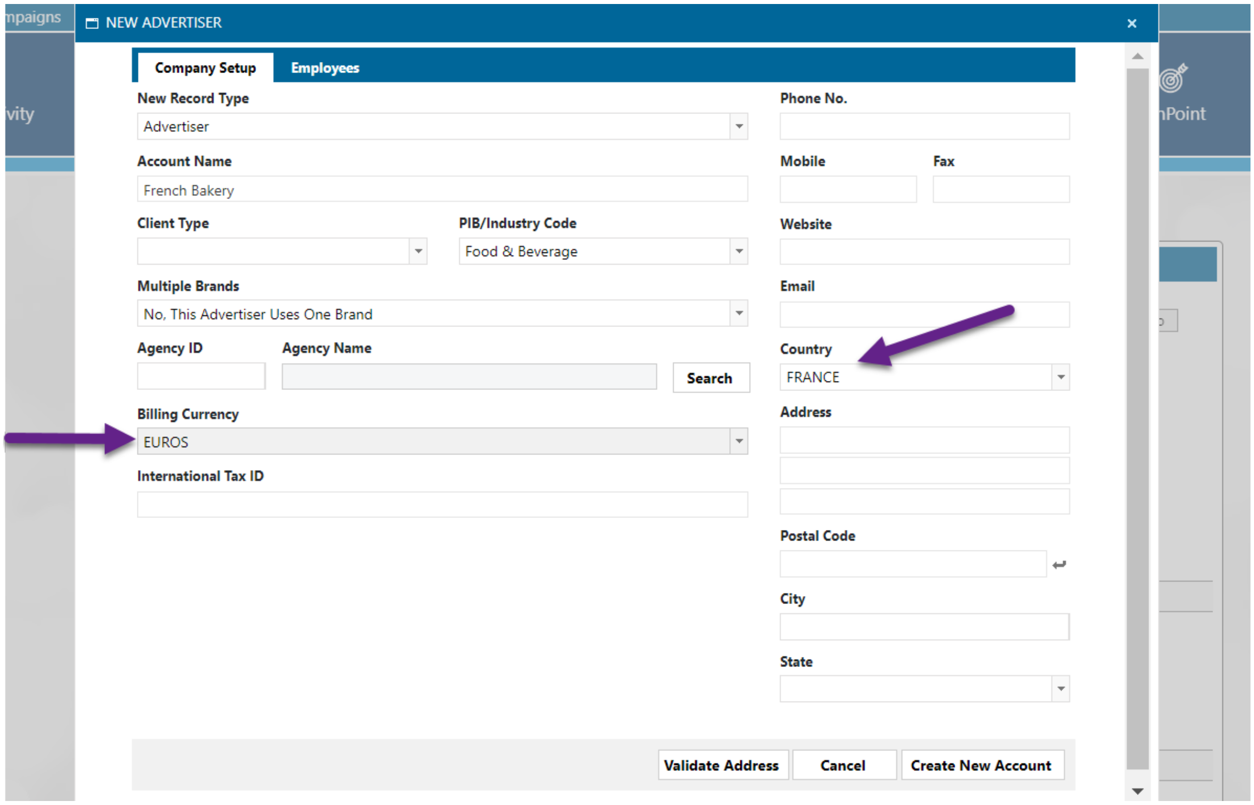


Navigate to the menu Setup -> System Tables Setup -> Address Setup and choose a country from the drop-down such as France or Canada and choose the currency for that country.



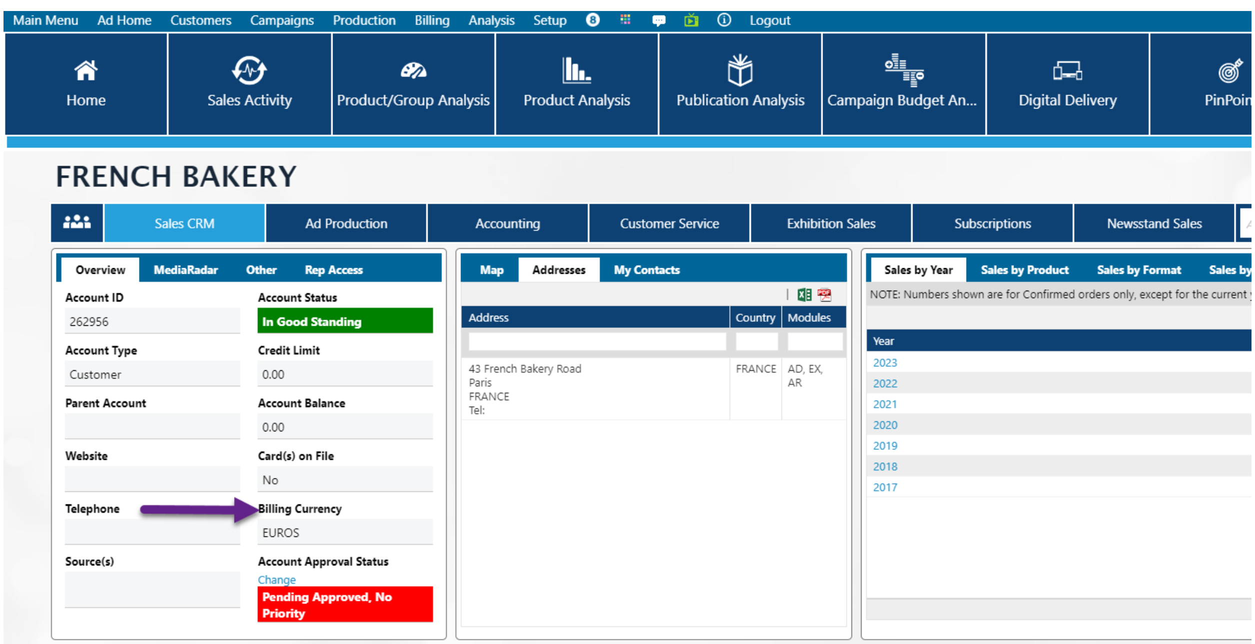
Save the settings.

Navigate to create an account for an advertiser from the menu Customers -> Advertiser Agency Maintenance. Click + to create a new account in the country you've setup above.



Note that the Billing Currency is set to match that country setup.

Navigate to the menu Customers -> Customer Overview screen for the above client.

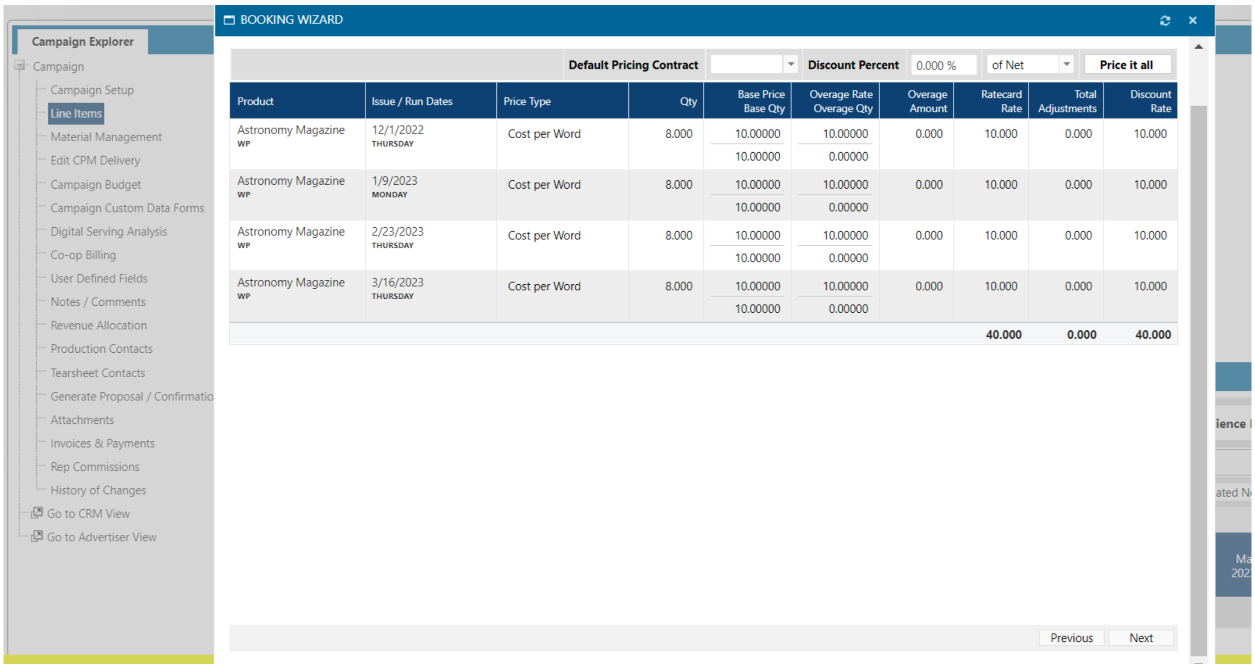


Note that the Billing Currency is marked.

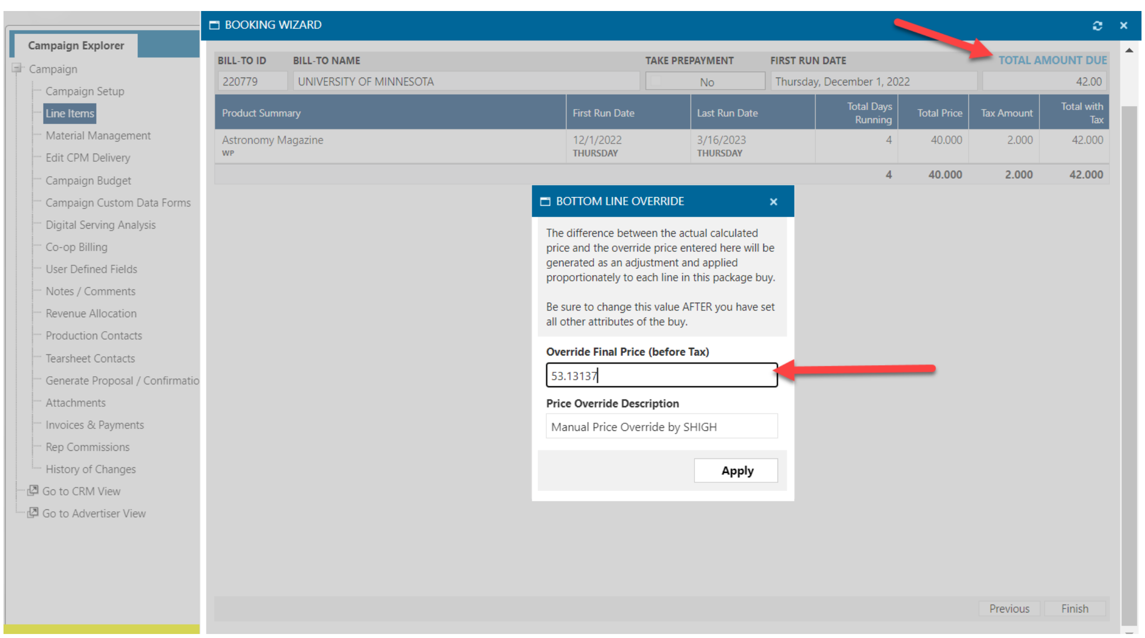
Bottom Line Overrides in Booking Wizard with Uneven Break Out Rates Placed on Last Insertion of Group

When user applies a bottom line override in Booking Wizard or Package rates which don't break out evenly, the override amount will be spread equitably across the issues. This can vary by adjusting the rate first (up or down).

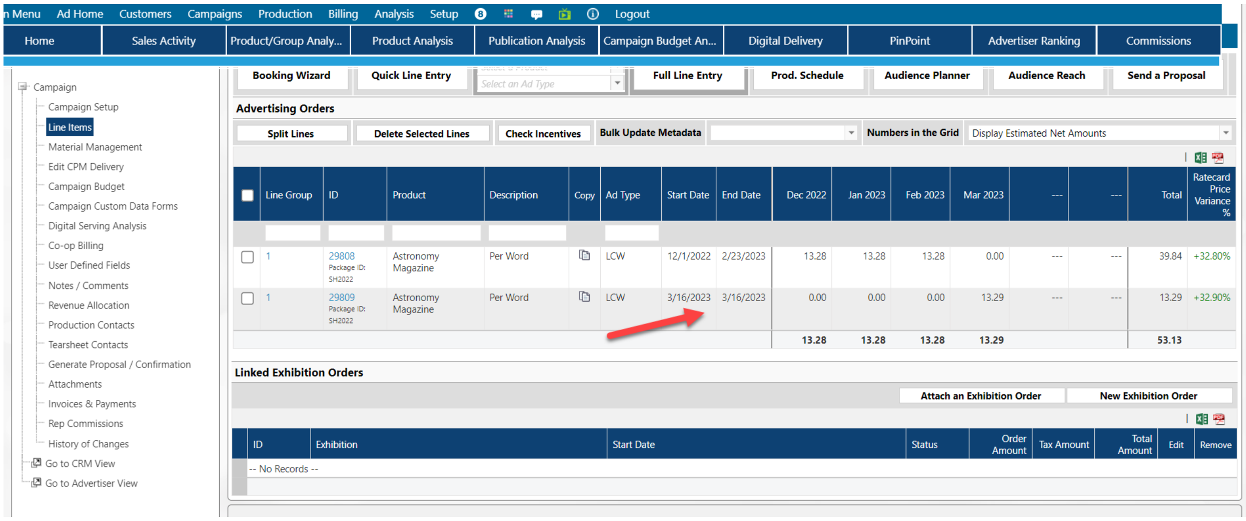
Navigate to create a campaign using the Booking Wizard with multiple lines.



Click Next until you reach the last tab.

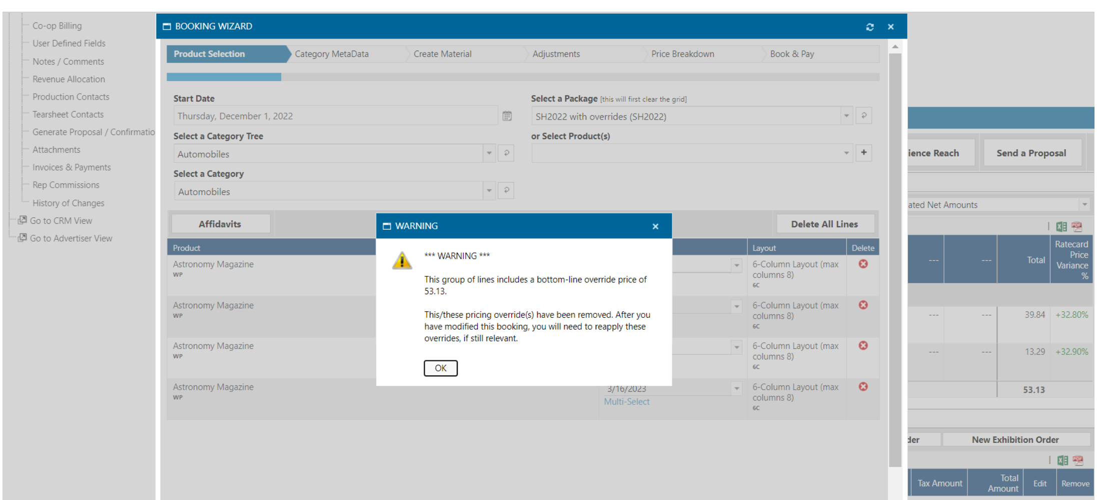


Click “Total Amount Due” hyperlink to override the price and enter an override price which will not spread evenly across all issues. Click Apply and then click Finish.



The system splits the last insertion from the other insertions and adds the difference in the price to this insertion. So, the system divides the override amount by the number of insertions and since it cannot bill fractions of a cent, the system adds up the fractions from each line, multiplies it by the number of insertions and adds that amount to the price of the last insertion of the order. For example, if the override price on 4 insertions is \$53.13, this amount when divided by 4 insertions is \$13.2825. The system places \$13.28 as the price of the 4 insertions, then multiplies the remaining fraction of the cents which is \$0.0025 by 4 insertions. This number is \$0.01 which is then added to the price of the last insertion \$13.28 to produce \$13.29. The system splits the last insertion on a separate line from the 3 other insertions for accuracy of billing purposes.

If you click the hyperlink to the lines again before confirming the campaign, the system alerts you to the override value and that it will remove it.



You can then proceed to keep the amounts or change them.

Another Example is as follows with formulae applied in red.

	A	B	C	D	E	F	G	H	I
1	Original Rate	Issues	Total	Override Total Rate	Override Rate (per issue)	Rate - Override	Rounding of Column F	Fraction Cents Remaining	Fraction Cents Total for all Issues
2	$ 1,350.00	4	$5,400.00	$ 5,333.37	$ 1,333.34	-16.6575	-16.65	-0.0075	-0.03
3			(B2*A2)		(D2/B2)	(E2-A2)		(F2-G2)	(B2*H2)
4								New Override Rate For 3 Issues	New Override for Final Issue
5	*Formulae in red*							$ 1,333.35	$ 1,333.32
6								(A2+G2)	(A2+G2+I2)
7									
8									

This is an example of 4 insertions/ issues with the original rate being $5400 for all 4 issues and an override rate of $5333.37.

Column Margin Bleeds for Compatibility with Naviga Plan

Product Setup screen now enhances the Column Layout and Size definitions to include the printable to physical page by adding margins bleed definitions to be compatible with Naviga Plan.

Navigate to the menu Setup -> Product Setup and choose a print product from the drop-down menu. Scroll to the Default Bleeds and Margins section.

Default Bleeds and Margins

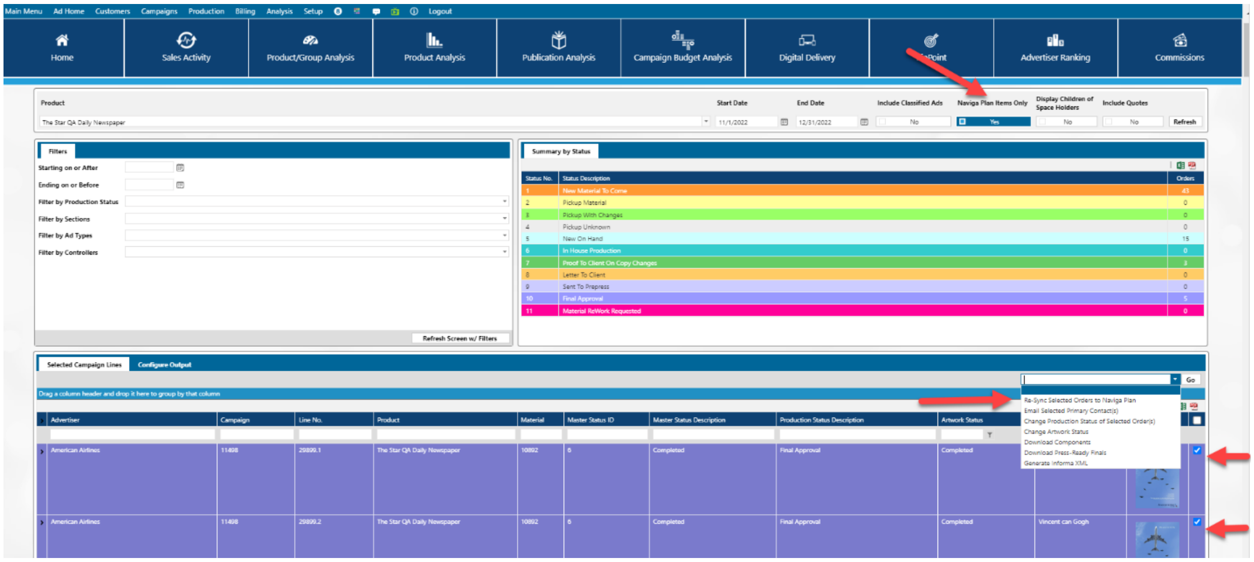
Top Bleed	0.50
Bottom Bleed	0.51
Left Bleed	0.52
Right Bleed	0.53
Top Margin	0.20
Bottom Margin	0.21
Left Margin	0.22
Right Margin	0.23

Fill in the details as compatible with Naviga Plan and save the settings. Upon sending the ad to Naviga Plan, the ad will not now fit correctly on the page.

Re-synch Ads to Naviga Plan

Ability to re-synch Naviga Ads into Naviga Plan from Print Production report screen.

Navigate to the menu Production -> Production by Print Product. Search on the Ads which were sent to Naviga Ad by checking the box “Naviga Plan Items Only” in the search criteria.



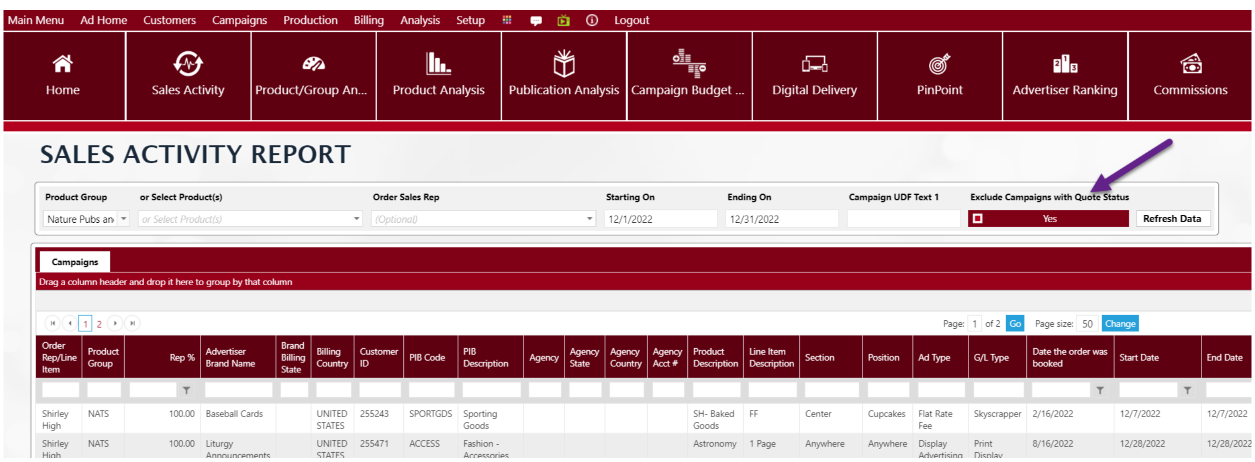
Check the box of the ad(s) in the results and click the “Go” drop-down. Select the option “Re-Sync Selected Orders to Naviga Plan”. Click OK to the confirmation message. This operation resends the ads into the Naviga Plan Queue and on to Plan.

Sales Activity Report

Sales Activity Report allows for excluding Quote status campaigns by default, but a flag allows to include them. Campaign Status is a new column in data results.

Navigate to the menu Analysis -> Salesrep Reports -> Salesrep Activity Report.

Choose the criteria to run the report, such as Product Group, Salesrep and date range of campaigns.



Note the flag “Exclude Campaigns with Quote Status” is checked by default to exclude the Quote status campaigns. Click Refresh Data. The data displays all campaigns for a rep on the order and includes the column Campaign Status at the far right of the data set.

You can uncheck the flag to include Quote Status orders and filter on the Campaign Status column as well to view specific data sets.

CRM Module

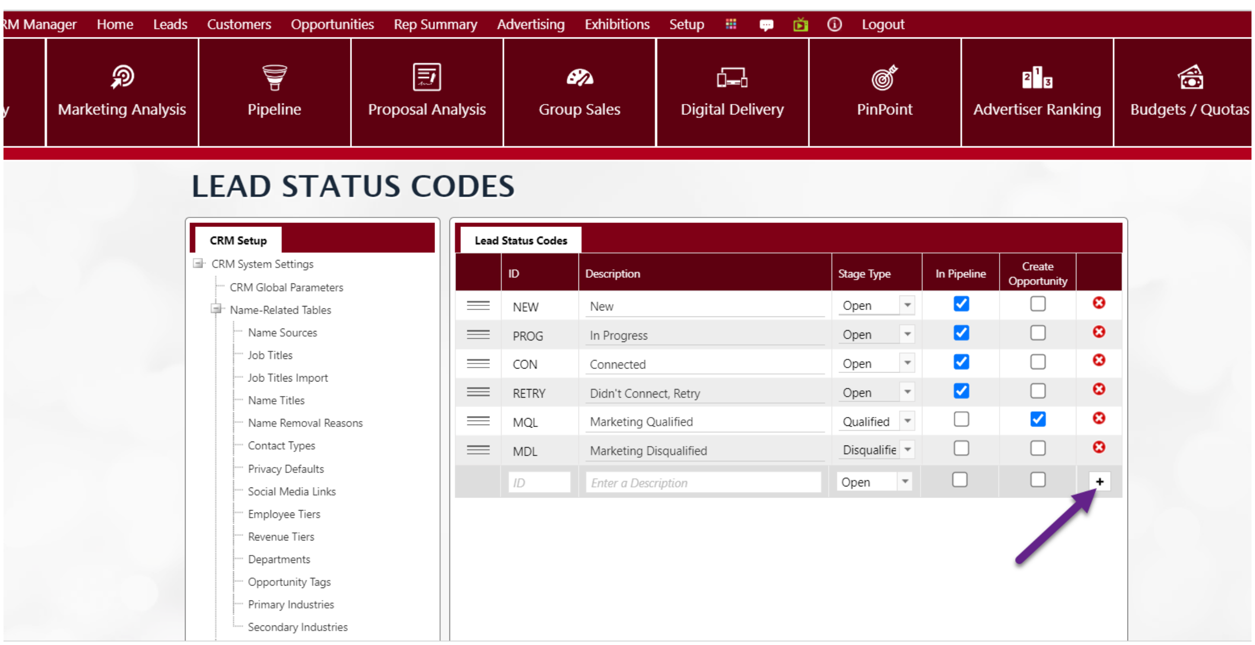
Leads – Naviga ad "Digital First" version only

A set of new screens called Leads provides the Sales teams with a tool to create and track sales leads. This is a precursor to these leads becoming opportunities and finally accounts. The screens allow for creating the lead, assigning the lead to a system user, creating potential opportunities pipeline for the leads, and finally tracking the progress of the sales leads being qualified to move forward or disqualified to be removed. A dashboard is provided for a quick management of leads.

Lead Status Code

The screen allows you to create the codes which provide tracking of each lead's status to indicate their stage in the sales life cycle.

Navigate to the menu Leads -> Lead Status Codes Setup. This is the same menu as in Setup -> CRM System Settings -> Other Tables -> Lead Status Codes.



Enter an ID, Description for the status to indicate the state of the lead. For example, New, In Progress, Cancelled and so forth.

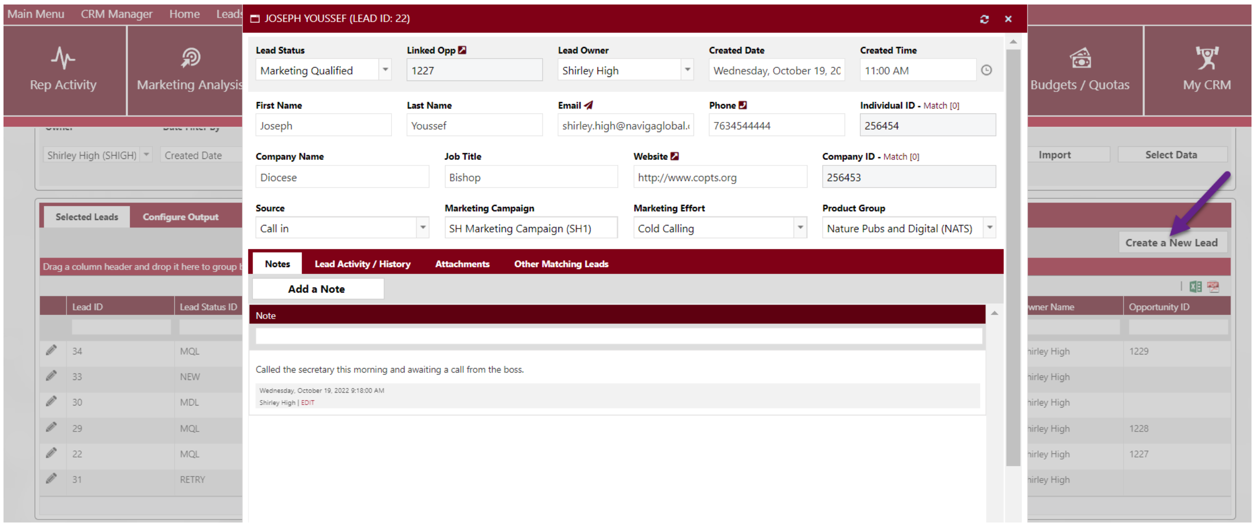
Choose the Stage Type, to match the description of the status. The Stage Types are hard coded values in the system of "Open" which means the lead is being introduced into the system, "Qualified" meaning the appropriate departments of sales and or marketing deemed the lead valid and viable, and "Disqualified" meaning the marketing department deemed the lead invalid to proceed.

Check applicable flags for In Pipeline, meaning display it in the Pipeline for follow-up purposes or not, and same for the flag Create Opportunity meaning to allow for creating an opportunity based on this status. Repeat adding various status as applicable and then click the + to add. When finished, click the Save to store the codes.

Dashboard

This screen can be used to assign leads to members of the marketing team.

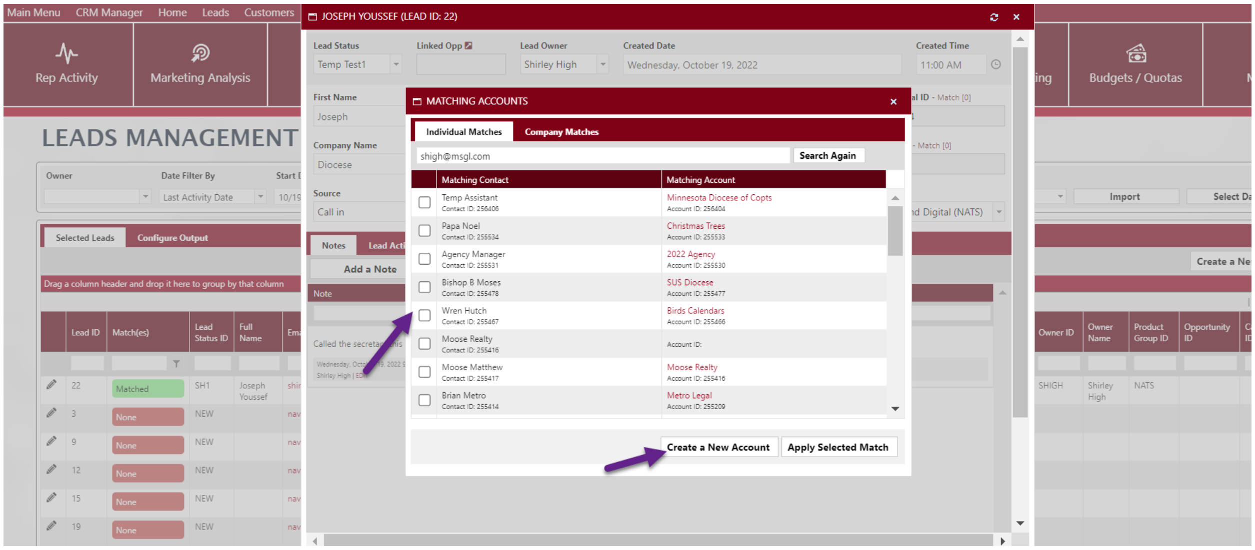
Navigate to the menu Leads -> Leads Dashboard. Click “Create a New Lead”.



Enter the data in all fields as much as possible to make the lead record meaningful. You can edit to add more details later. The lead owner field provides a list of system users from which you can choose including yourself.

The lead can be attached here to a Company or Individual by clicking the Match hyperlink next to the Company of Individual fields. If the lead is not a company or individual or attached to an individual or company in Naviga you won’t be able to create opportunities and proposals for this lead at this point, but the lead will remain in the system to manage. The Match works based on an email address if you click on “Individual Match ID” and by Website address if you click “Company Match ID”.

Note also that there’s the tab “Other Matching Leads” where the system lists partial matches to this account by email address or by website. You can then use this search status for a partial match on the dashboard.

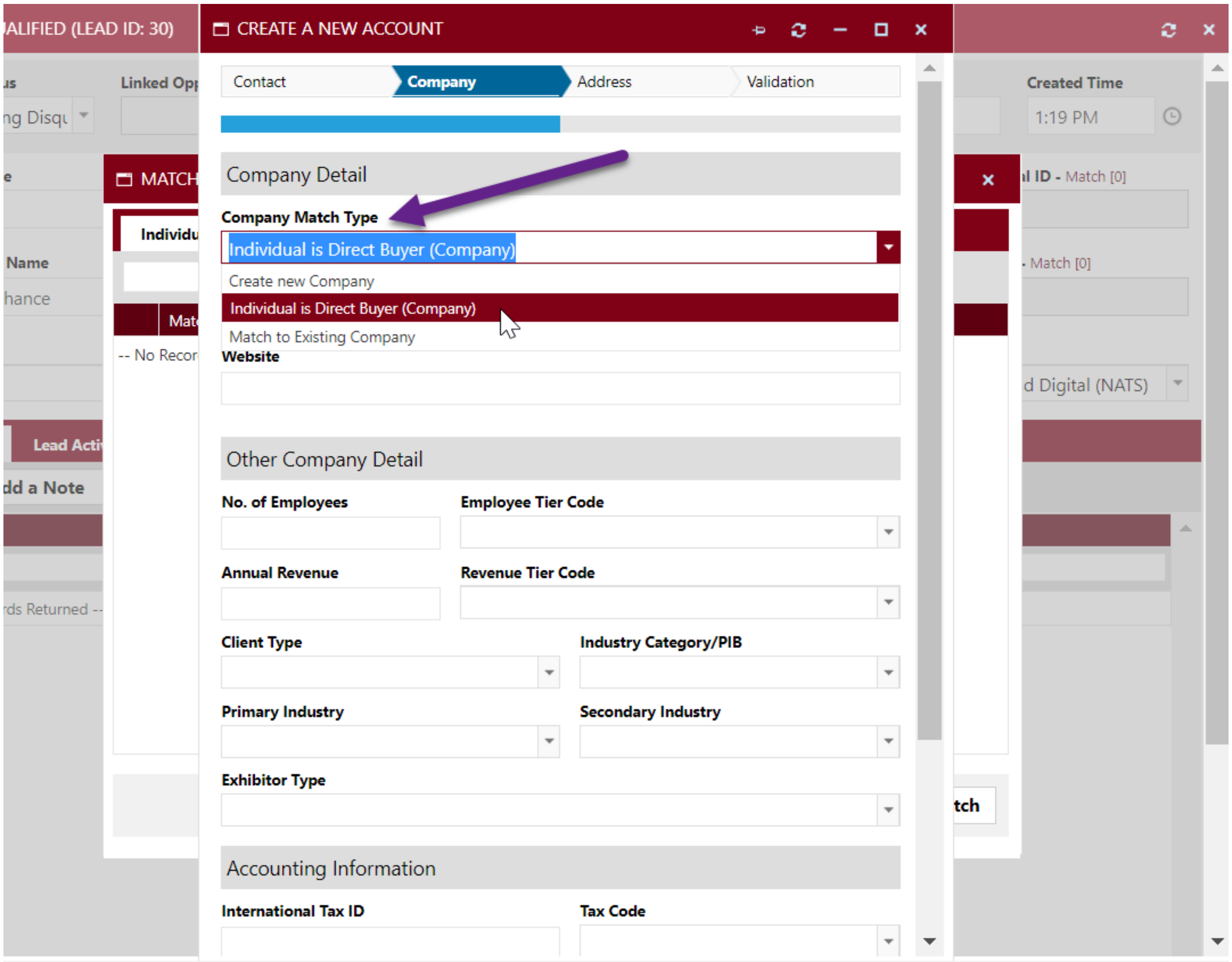


You can then check the box(es) of any of these matches to attach them to the lead.

Or you can create a new account to attach it to the lead. This creates a new advertising account in the system. The advertising account created will carry this lead's name as a contact on the advertiser record.

Click Create a New Account and you can choose one of three options:

1. Create a New Company – This would create a new account in Naviga.
2. Individual is a Direct Buyer – This will create this lead as an individual. Note that even if this is the case, this individual's account ID becomes the Company Account ID to be able to place opportunities and proposals for this account.
3. Match to Existing Company – When you search on this account, you can then attach to an already existing account in the system. You must have a valid Company or Individual ID in the Lead record which matches one in Naviga.

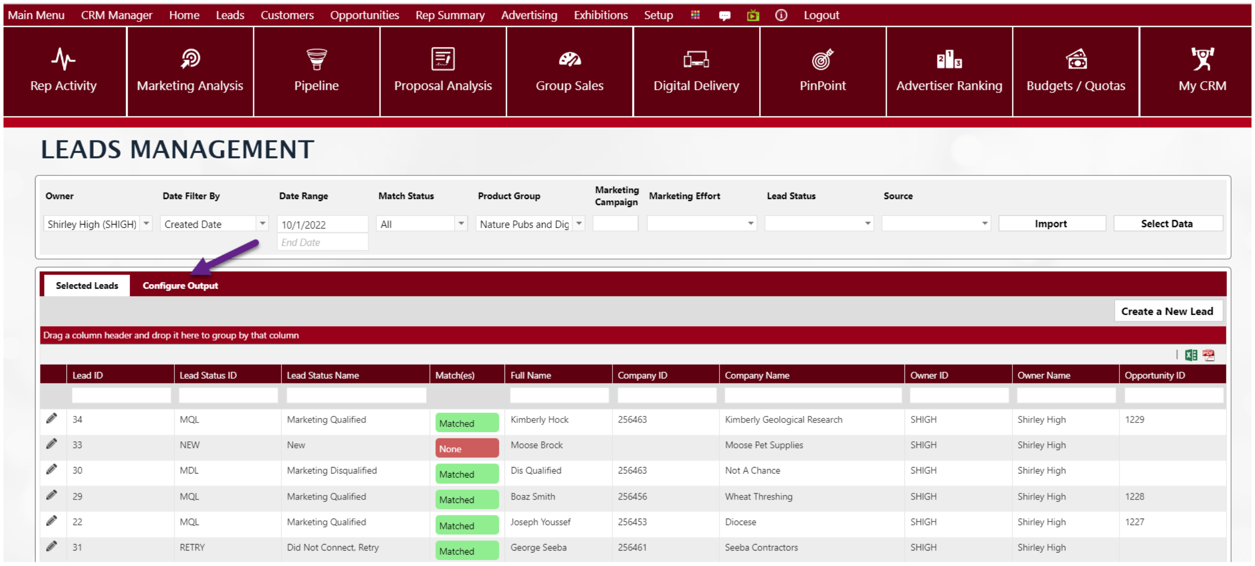


When you proceed to the final tab "Validation", this tab double checks Naviga to search for duplicates and alert you so that there would not be duplicates in the system and cause inaccurate reporting.

You can use the Attachments tab to bulk attach or single file attach important documentation to the lead account.

Some changes made to the lead account will be tracked in the tab "Lead Activity or History". Also, you can enter typed notes in the Notes tab.

You can search on leads in the Dashboard using any of the search criteria.

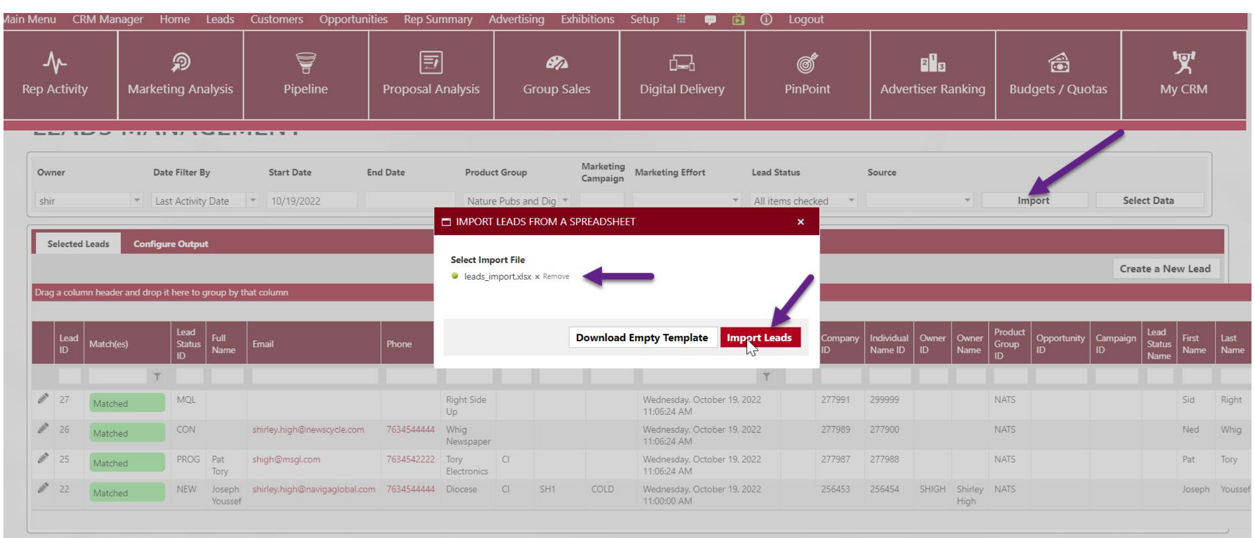


This can be by Owner Name, and Dates or Marketing Campaign, or Product Group and so forth depending on the data you stored on the lead record.

You can also use the Configure Output tab to add more columns to display all data related to the lead as needed.

On the On Screen Columns side, highlight the fields you'd like to add from the "Available Grid Columns" and click the right facing arrow to move them to the "Selected Grid Columns". Then click Save Configuration. You can repeat with the Excel Output side as well.

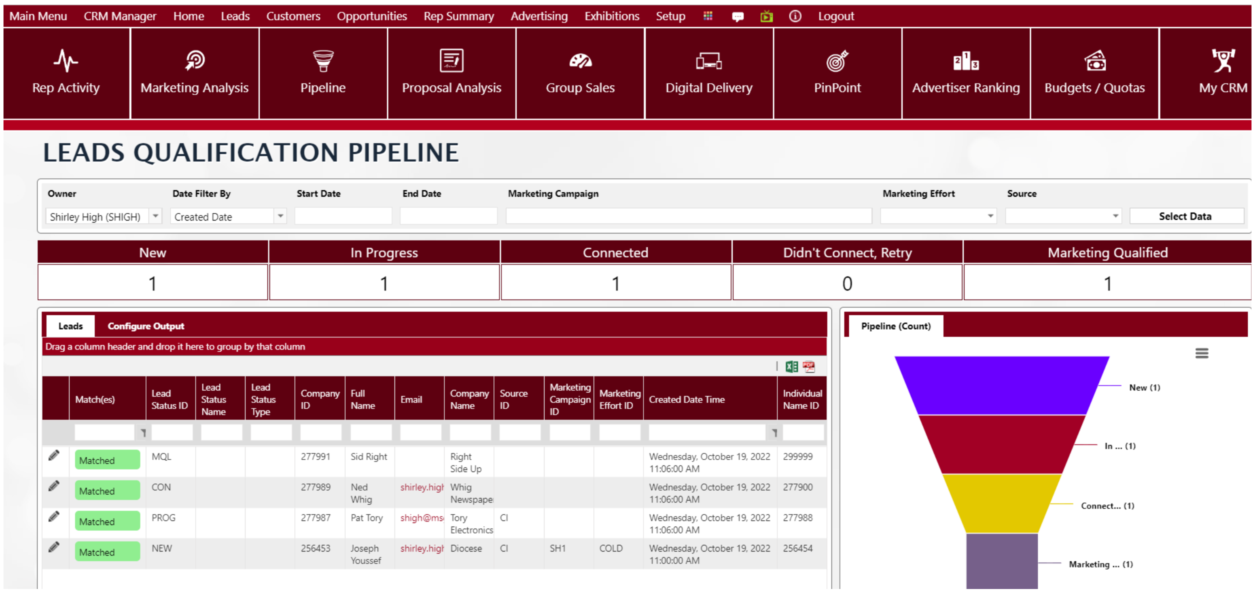
Note that you can use the "Import" button, then download a template, fill out multiple rows and import all the data in bulk. The fields are all optional and highlighted yellow fields must match values already in Naviga. Save the template on your desktop.



Browse to select the saved template and select it and then click “Import Leads”. Once the file is imported the data displays and can be managed moving forward.

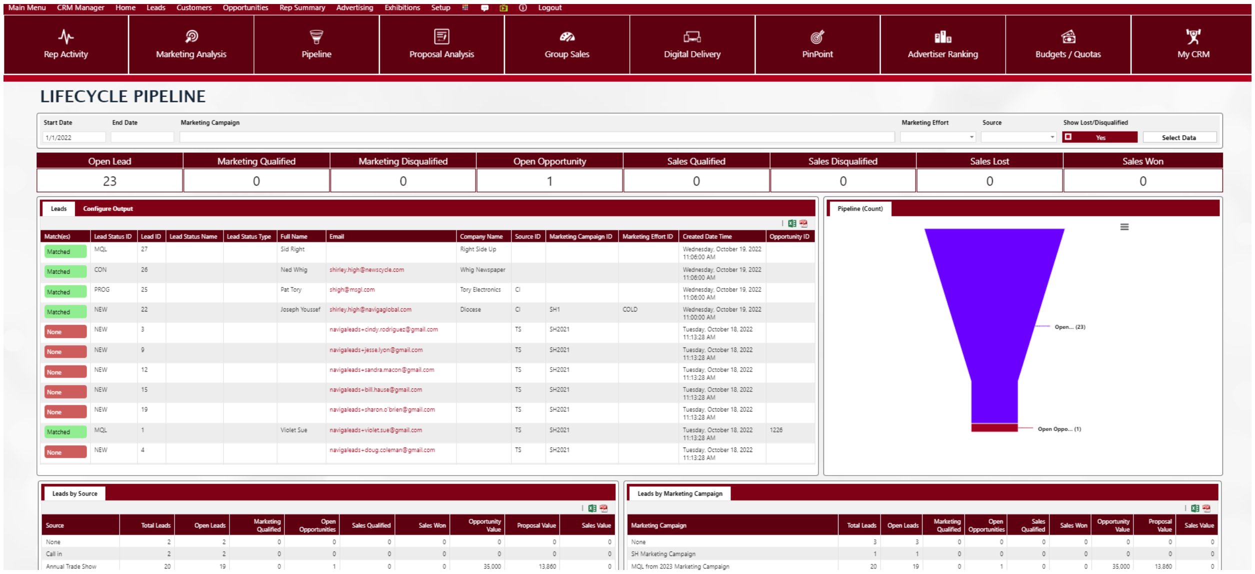
Leads Qualification Pipeline

This screen is similar to the Leads Dashboard screen with more visual graphics and tables for organizational purposes. Leads Qualification Pipeline can be used by managers or lead owners to use while they are qualifying the lead.



Lifecycle Pipeline

Once a lead is qualified by Marketing, the lead then is transferred over to sales. This is where the Lifecycle Pipeline screen can be useful, especially for team members who would like to analyze the leads overall from Lead to Cash. You can see the entire lifecycle of that lead in this screen. How many leads came in from Source XYZ, how many ended up as Marketing Qualified, how many of those then became Sales Qualified Leads and became an Opportunity and at what value. Then for those who ended up with a proposal, how many of those ended up turning into real orders, and for how much revenue.

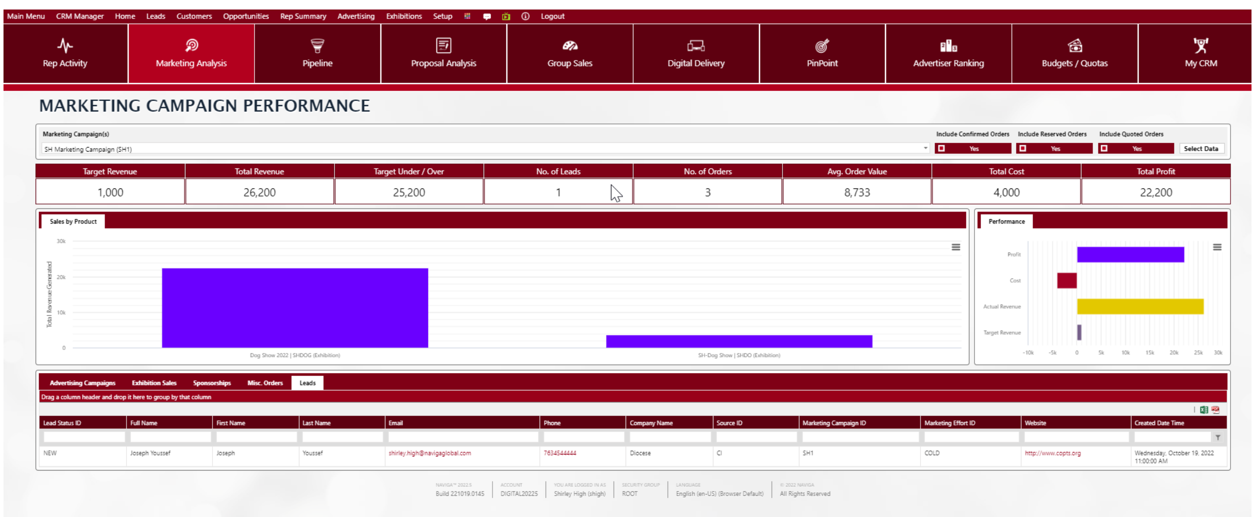


Navigate to the menu Leads -> Leads Lifecycle Pipeline and search by the criteria provided.

Note the bottom section which is divided by the Leads by Source and the other side Leads by Marketing Campaign.

Marketing Campaign Performance

This displays the leads brought in through marketing campaigns. Navigate to the menu Leads -> Marketing Campaign Performance. Search on the marketing campaign.

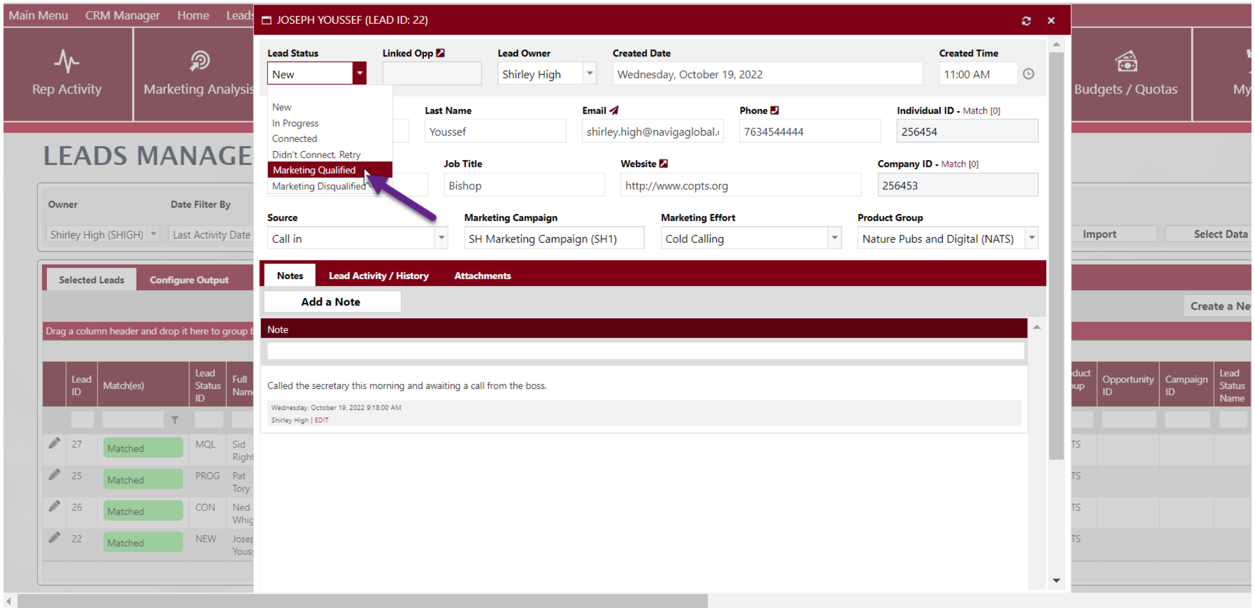


Click the tab "Leads". The data displays the leads attached to this marketing campaign.

Create an Opportunity from Leads

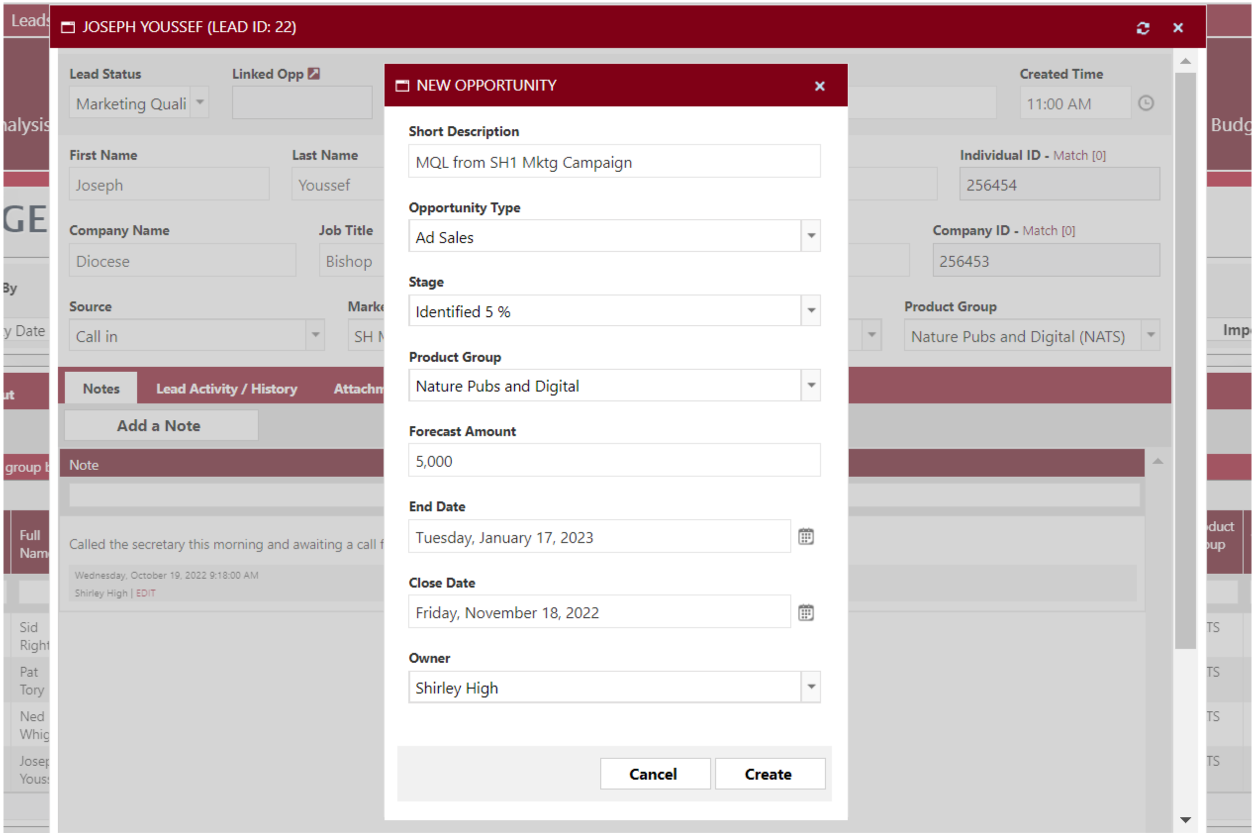
As a prerequisite, the lead must be attached to a valid Company or Individual ID in the system, meaning the lead must be attached to an advertiser in Naviga. So, the Company ID or Individual ID must be valid values in Naviga as a New Account when you click Match ID or an existing account.

Navigate to the menu Leads -> Leads Dashboard and search on the leads you'd like to transform into an opportunity. Click the Lead Status ID.

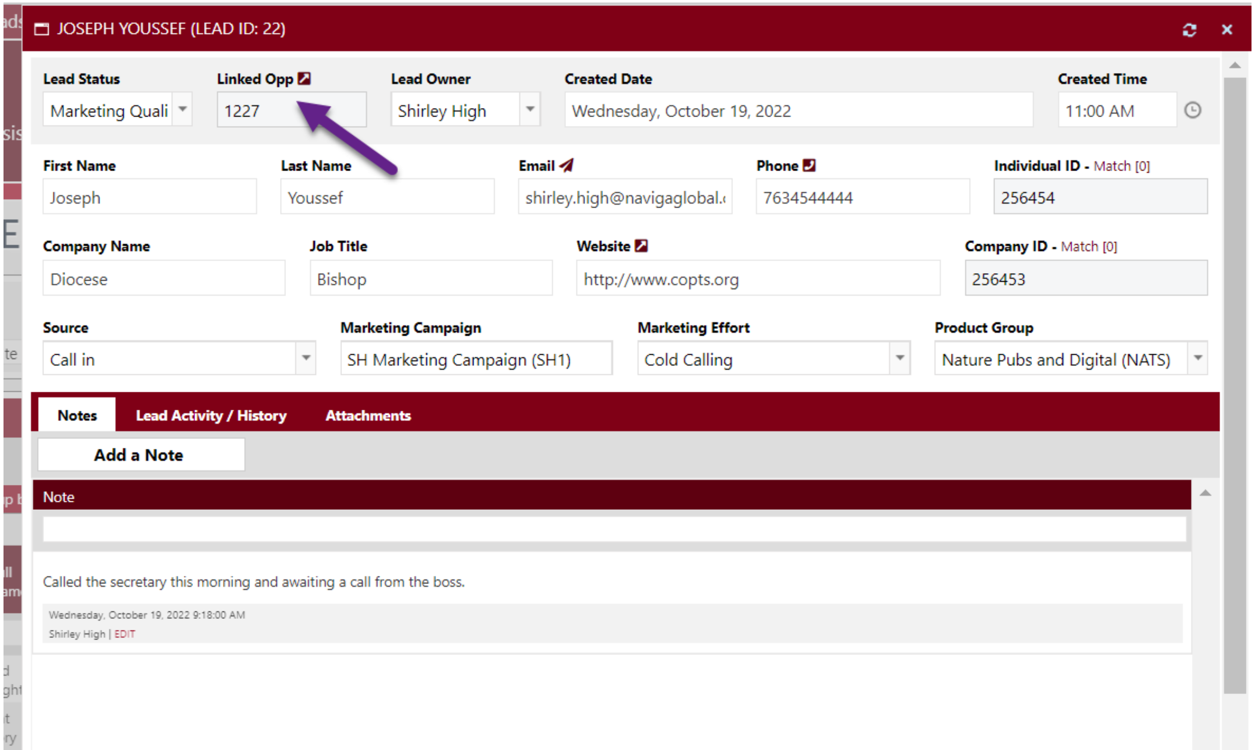


In the pop-up screen, click on the Lead Status drop-down menu. Choose the status which is setup as allowed to create an opportunity according to the Lead Status Code table above. For example, the Marketing Qualified.

Choose the Marketing Qualified status and the system prompts you to create an opportunity.



Confirm by clicking on Yes and the pop-up screen to enter the new opportunity details displays. Click Create.



The field "Linked Opp" is populated with the Opportunity ID. Click the arrow next to the field and the opportunity screen opens up with the details.

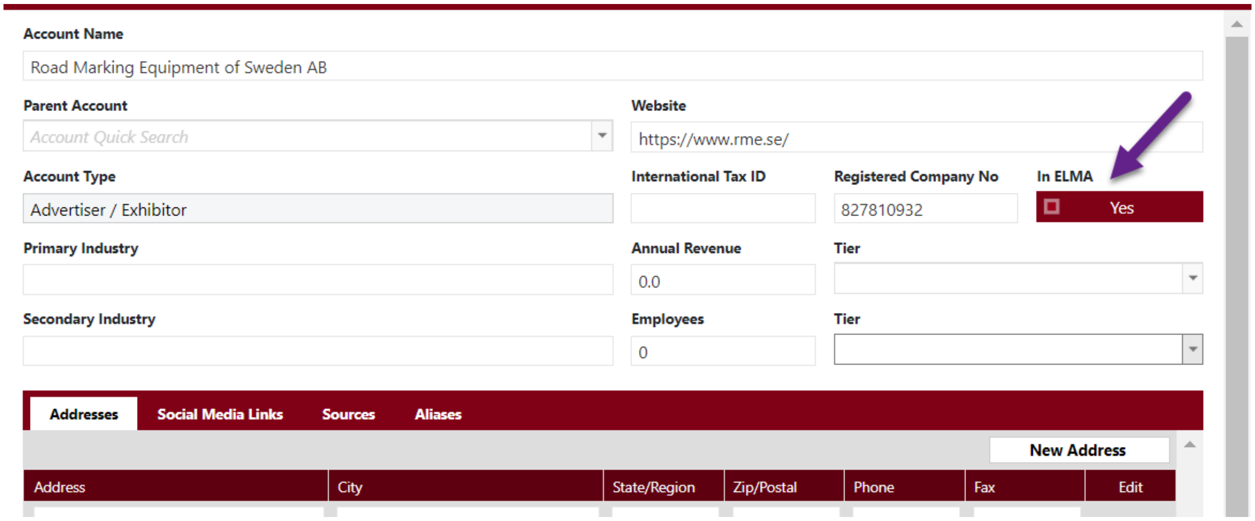
The opportunity screen contains a section listing the lead name. That opportunity can be changed to be a proposal from within the opportunity and go through the life cycle of an order.

Create New Account with ELMA Registration Validation

In creating a new account from the Customers menu, there's a new section which includes the International Tax ID and Registration Number and whether it's in the ELMA Registration, as applicable to countries which require this information.

Navigate to the AD module menu Setup -> Advertising Setup -> Advertising System Parameters and check the flag "Validate Registered Company No." Save the settings, and then navigate back to the CRM module.

Click the menu Customers -> Add a New Account.



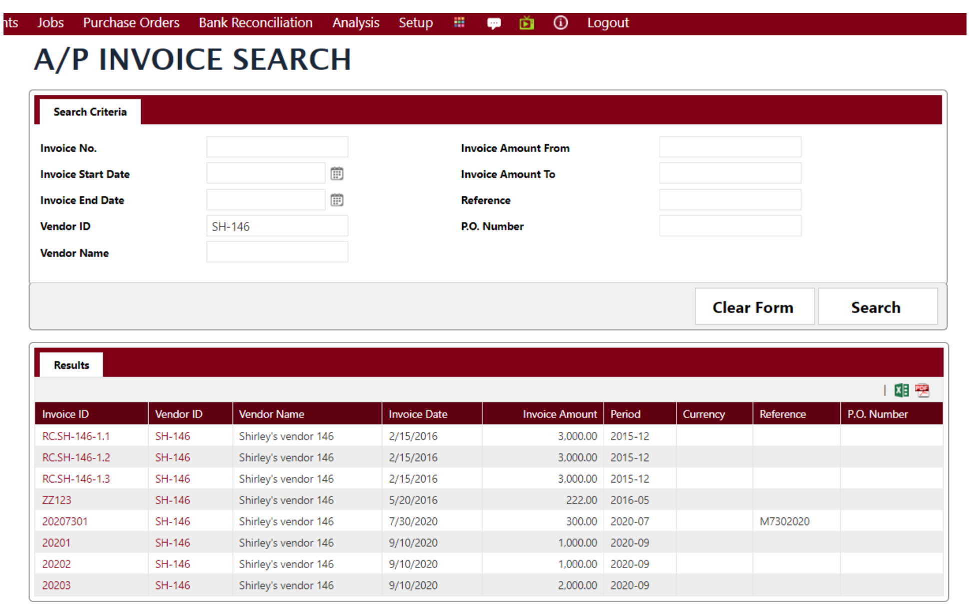
When entering the Registered Company No., the flag In ELMA will indicate whether the number is registered and valid.

Accounts Payable Module

Vendor Merge

New AP Vendor merge process is available which purpose is to merge invoices and checks under the target vendor while deleting the source vendor(s). The system accounts for identical invoice ids by adding a .1 to make the ID unique.

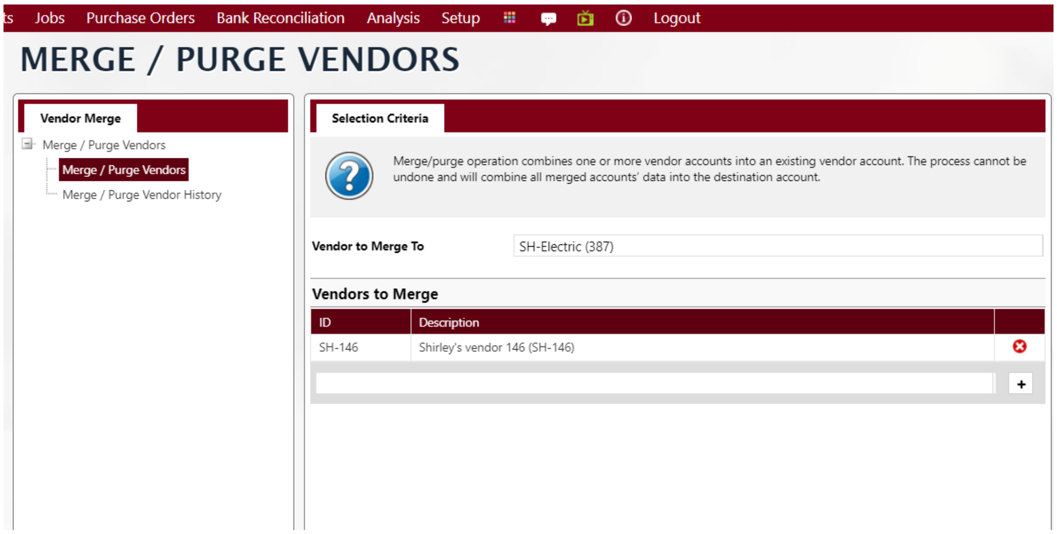
Navigate to the menu Invoices -> A/P Invoice Search and search for invoices by the vendor ID which you want to merge into another vendor.



Invoice ID	Vendor ID	Vendor Name	Invoice Date	Invoice Amount	Period	Currency	Reference	P.O. Number
RC.SH-146-1.1	SH-146	Shirley's vendor 146	2/15/2016	3,000.00	2015-12			
RC.SH-146-1.2	SH-146	Shirley's vendor 146	2/15/2016	3,000.00	2015-12			
RC.SH-146-1.3	SH-146	Shirley's vendor 146	2/15/2016	3,000.00	2015-12			
ZZ123	SH-146	Shirley's vendor 146	5/20/2016	222.00	2016-05			
20207301	SH-146	Shirley's vendor 146	7/30/2020	300.00	2020-07		M7302020	
20201	SH-146	Shirley's vendor 146	9/10/2020	1,000.00	2020-09			
20202	SH-146	Shirley's vendor 146	9/10/2020	1,000.00	2020-09			
20203	SH-146	Shirley's vendor 146	9/10/2020	2,000.00	2020-09			

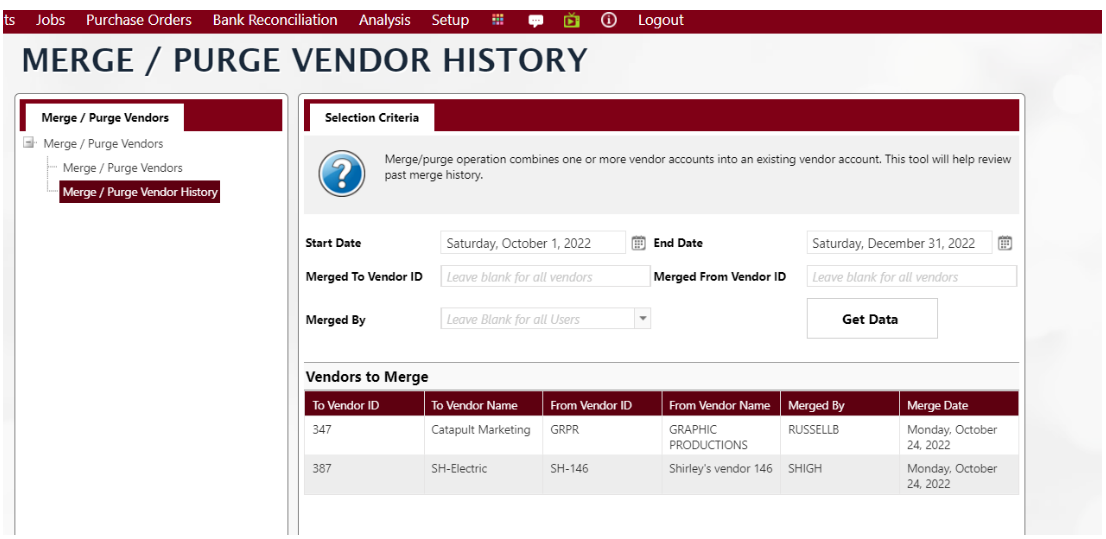
Navigate to the menu Vendors -> Vendor Merge.

Select the target vendor to merge all under in the field “Vendor to Merge to”. Then choose the vendor to be merged in the section “Vendors to Merge”. Click the + to add the vendor.



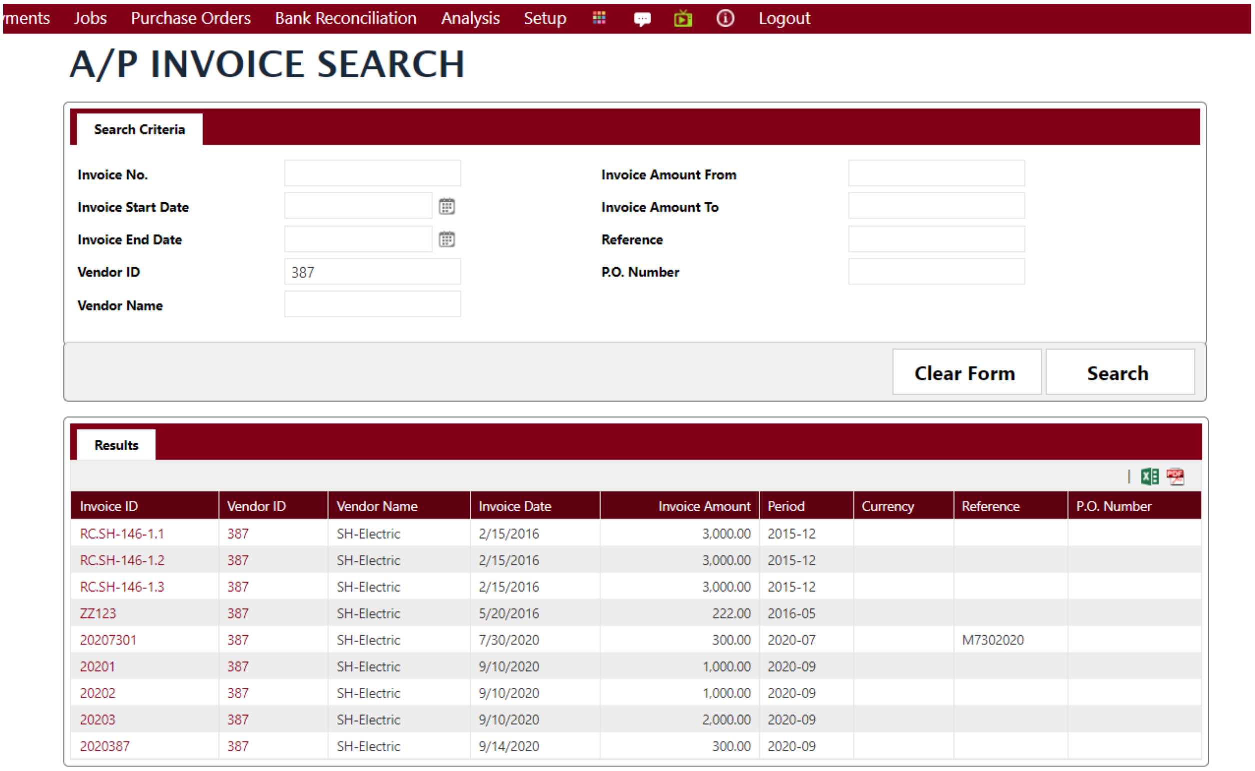
Repeat to add more vendors and click the + to merge more vendors into the one vendor. Then click “Merge Vendors”.

Click the Merge/ Purge Vendor History node.



Search by date range and/or user who did the merge or vendor IDs. Click “Get Data” and the merged vendors display.

Navigate to the menu Invoices -> A/P Invoice Search. Search on the ID of the merged vendor and the system produces no invoices. Search on the target vendor which absorbed the other vendor invoices.



The invoices listed include all the old vendor's data.

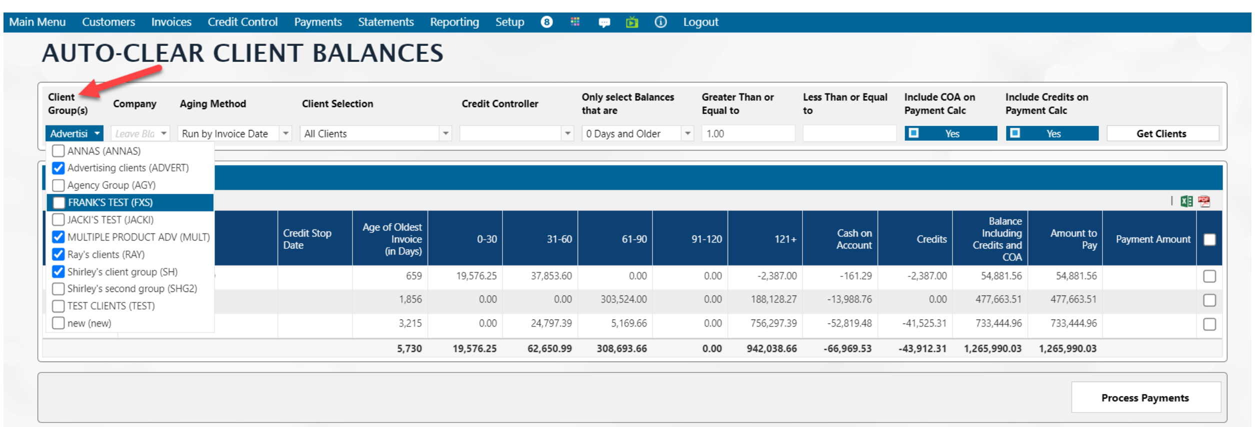
If two invoices from both vendors are matching in IDs, the system will add a .1 counter to the invoice to make the ID of that invoice unique.

Accounts Receivable Module

Auto Clear Client Balances Client Group ID

Client Group ID on Auto Clear Client Balances screen.

Navigate to the menu Statements -> Auto Clear Client Balances.

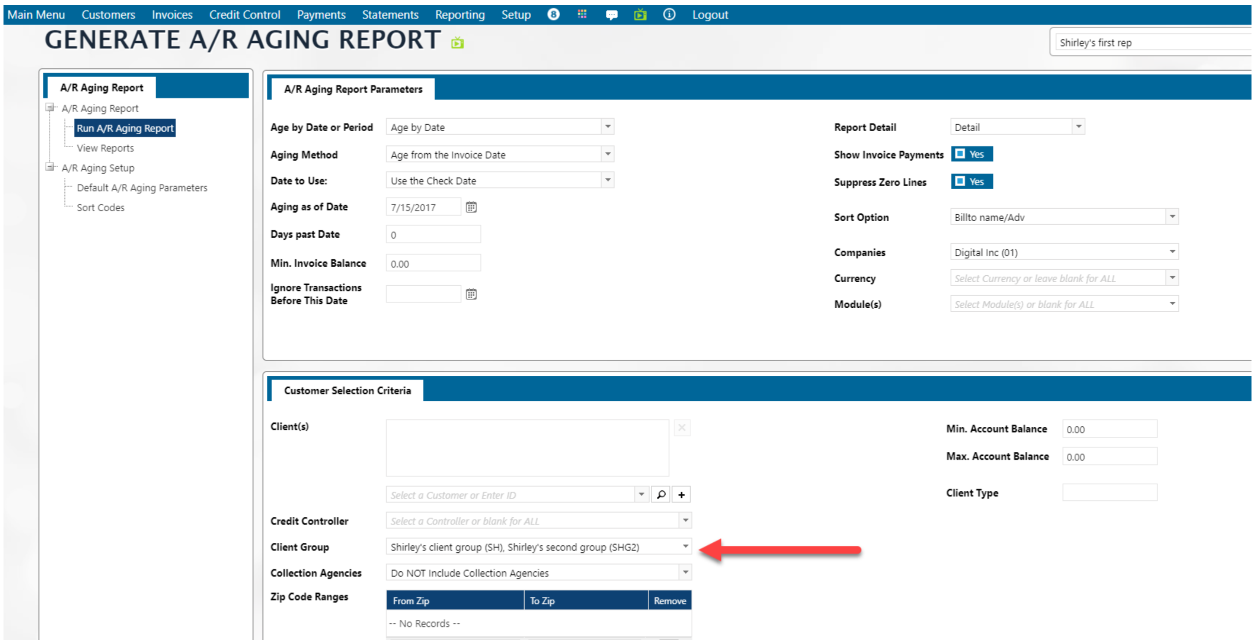


Choose one or more of the Client Groups in the drop-down and fill in the remaining criteria. The data results are filtered by the groups you chose. If left blank and no groups are checked, then all groups display.

Big AR Aging Report Client Group

Client Group ID is also available as a field in the Big AR Aging Report to query on in the Customer Selection section.

Navigate to the menu Reporting -> Big AR Aging Report.

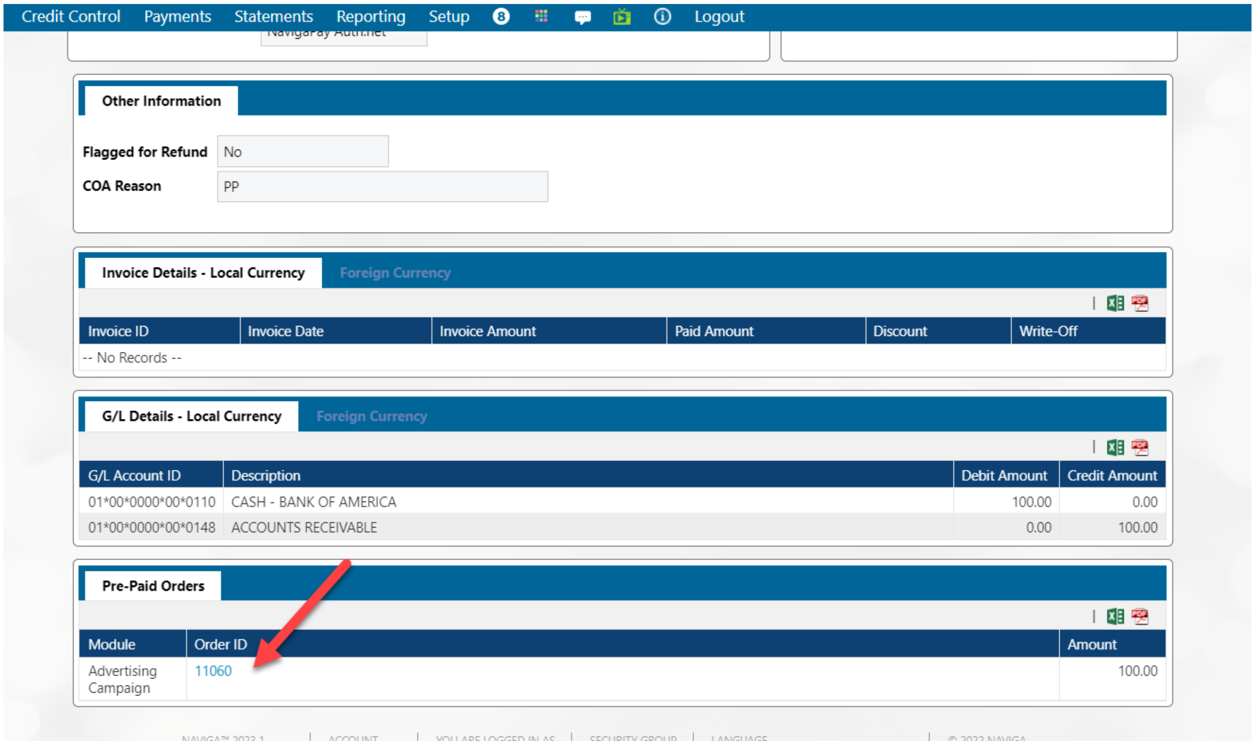


Choose a template or create a new one and in the Customer Selection Criteria section, choose one or more Client Group to narrow down your data selection to these groups.

Payment Screen Detail to Order ID Link Leads to Edit Campaign Screen

Edit Order when clicking Payment ID hyperlink and then click Order ID instead of directing user to the view screen. System will check user security to see if they can edit.

Navigate to the menu Payments -> List of Payments and search on Payments by date.



Click the Payment ID hyperlink and scroll to the Orders section. Click the Order ID hyperlink. The system directs you to the Campaign Edit screen, instead of the View Order screen as before.