

User Guide 2022.5



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User Guide 2022.5

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.

The screenshot displays the Naviga system interface for the Advertiser Agency Maintenance -> Advertising Setup -> Brands tab. The interface consists of a top navigation bar, a left sidebar menu, and a main content area.

Top Navigation Bar: Main Menu, Ad Home, Customers, Campaigns, Production, Billing, Analysis, Setup, 8, Logout.

Left Sidebar Menu: Home, Sales Activity, Product/Group Analy..., Product Analysis, Publication Analysis, Campaign Budget An... (highlighted), Rep Assignments, Billing Overrides, Production Contacts, Tearsheet Contacts, Division Setup, Division Detail, Exhibition Group Overrides, Orders, List of Orders.

Main Content Area:

- Advertiser ID:** 255488
- Advertiser Name:** St. George Church
- Brand ID:** A1 (dropdown menu) **New** button
- Brand Name:** Retreats
- Industry Category/PIB:** Accessories (dropdown menu)
- Ad Index Name:** (empty field)
- Allow use on Portal:** ☒ Yes
- Inactive:** ☐ No
- Other Settings:**
 - Default Discount % on Advertising Campaigns:** (empty field)
 - Agency:** (empty field)
 - Agency Name:** (empty field)
 - Is this a Remit-to?:** ☐ No
 - Production Controller:** Shirley High (dropdown menu)
 - Campaign Manager:** Shirley High (dropdown menu)
 - Actuals Reconciliation:** Use Estimates (dropdown menu)

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.

Date/Time	User	Type	Description
Tuesday, September 27, 2022 3:02:00 PM	Shirley High	BRAND	Brand A1 Retreats Campaign Manager changed from to SHIGH
Tuesday, September 27, 2022 3:02:00 PM	Shirley High	BRAND	Brand A1 Retreats Production Controller changed from to SHIGH
Tuesday, September 27, 2022 1:48:00 PM	Shirley High	CLI	Client id 255488 changed Terms 0 added
Monday, June 13, 2022 10:44:00 AM	Shirley High	CHG	Company id 255488 changed Website www.saintgeorgeplymouth.com added Name Source Code CI added
Monday, February 7, 2022 5:49:00 PM	Shirley High	CLI	Client id 255488 changed Credit Limit added
Monday, February 7, 2022 5:48:00 PM	Shirley High	CLI	Client id 255488 changed Credit Limit cleared
Monday, February 7, 2022 5:32:00 PM	Shirley High	CLI	Client id 255488 changed Inv Contact Id cleared
Tuesday, May 4, 2021 4:48:00 PM	Shirley High	CLI	Client id 255488 changed Credit Limit added

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.

Custom Data Forms

Custom Data Form ID: YT

Form Description: You Tube

Form Type: Campaign Tickets

Form MetaData	Template					
Label/Question	Prompt Type	Validation	Formatting	Merge Tag	Required	
Marketing Consultant	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		MCONSULTANT	☐	
Publisher's Market	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		MARKET	☐	
Tru Measure XVID	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		TRU_MEASURE	☐	
CSS Name	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		CSS	☐	
Headline	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		HEADLINE	☒	
Body Text	Single-Line Text	No Validation Maximum Characters (Leave blank to unlimited)		BODY	☐	

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.

TICKET TYPES

Ticket Setup Tables		Codes				
- Campaign Tickets Setup - Ticket Teams - Master Ticket Workflow - Ticket Type Workflows Ticket Types - Ticket Priorities - Ticket Workflow Routing		ID	Description	Custom Data Form	Status Group	Inactive
		APPROVAL	Manager Approval	Giveaway	All New Slots	☐
		CM	Campaign Modification	Glacier Form	Campaign Modification Rec	☐
		OPS	Operational	PM Test	Shirley's Status Group	☐
		CRED	CREDIT APPROVAL	Ray's form	Financial Review	☐
		ERR	Line Item Error		Campaign Modification Rec	☐
		SH	Shirley Form	You Tube	Shirley's Status Group	☐
		ID	Enter a Description			☐

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".

Campaign Explorer

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

NEW TICKET 66 FOR CAMPAIGN 11349

Ticket Type Shirley Form **Priority** Ignore and see if it goes **Status** **Assigned Team** **Assigned User**

Short Description test form **Custom Data Form (Edit)** You Tube **Team Owner** Accounting All New Slot! **User Owner** Shirley High

Long Description

11pt Arial A Formats B I U S

test form

P 2 WORDS

Notes Regarding Line Items (Other) Line Items History of Changes Attachments

Add Selected Lines

ID	Product	Description
29362	Blackfeet Nation Size: Rectangle (180 x 150), 3:1 Rectangle (300 x 100), Full Banner (720 x 300) Section: Culture Position: Impressions	CPM
29574	Astronomy Magazine	1 Page

by User Last Updated

igh Tuesday, November 8, 2022 2:39:06 PM

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.

Customers Campaigns Production Billing Analysis Setup 8 Logout

Sales Activity Product/Group An... Product Analysis Publication Analysis Campaign Budget ... Digital Delivery PinPoint

FREQUENCY DISCOUNT SCHEDULES

Frequency Discounts

Schedule ID: COMM New

Schedule Description: Commercial Rate Breaks

Rounding: No Rounding

Apply to Base Rate Only: ☒ Yes

Rates

Frequency	Discount Percent from 1x Rate
2	5.0000000000
3	10.0000000000

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.

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

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

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

Product: Astronomy Magazine

Ratecard Type: Listing / Liner Rates

Client Type:

Start Date: Friday, January 1, 2021

Selection Type: Only Active and Future Ratecards

Client(s):

Category Tree: Automobiles

End Date: Saturday, December 31, 2022

Ratecard ID: 195

Currency:

Ratecard Description: Listing Only

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

ID	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	Base Qty	Base Rate	Overage Rate	Inactive	N
974		CPCI Listing	Yes	420,000	Listings	Everywhere	CPCI Listing	Print Classified		1.00	3.00			1.00	200.00000	200.00000	No	Y

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.

NEW COST PER COLUMN-INCH LINE

Material	Insertion Details	Category MetaData	Other Options	User Defined Fields	Rep Assignments	Affidavits
Product	Astronomy Magazine		Base Price	21.21		
Ad Type	Liner Column / Inch		Included Column/Inches	2.00		
Contract			Overage Rate per Column/Inch	5.90000		
Edition(s)			Additional Column/Inches	8.31		
Ratecard	Listing Only		Price per Insertion	70.24		
Rate Line	Liner Col Inch		Adjustments	-2.12		
Description	Liner Col Inch		Adjusted Price per Insertion	68.12		
Size Description	1 Column(s) by 10.313 Inch(es)		Billing Total Amt	204.36		
Section	Listings		Estimated Tax	0.00		
Position	Everywhere		Estimated Total	204.36		
G/L Type	Print Classified					
Color						

The Adjusted Price per Insertion is the Price per Insertion minus the Adjustments (Base Rate minus percentage discount from schedule)

Day	Issue Date	Billing Amount	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	3 October 2022	68.12					
Thursday	6 October 2022	68.12					
Monday	10 October 2022	68.12					

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.

NEW COST PER COLUMN-INCH LINE

Material	Insertion Details	Category MetaData	Other Options	User Defined Fields	Rep Assignments	Affidavits
Product	Astronomy Magazine		Base Price	21.21		
Ad Type	Liner Column / Inch		Included Column/Inches	2.00		
Contract			Overage Rate per Column/Inch	5.90000		
Edition(s)			Additional Column/Inches	11.69		
Ratecard	Listing Only		Price per Insertion	90.18		
Rate Line	Liner Col Inch		Adjustments	-9.02		
Description	Liner Col Inch		Adjusted Price per Insertion	81.16		
Size Description	1 Column(s) by 13.688 Inch(es)		Billing Total Amt	243.48		
Section	Listings		Estimated Tax	0.00		
Position	Everywhere		Estimated Total	243.48		
G/L Type	Print Classified					
Color						

Adjustment percentage from frequency discount schedule is calculated based on the Price Per Insertion and not the Base Rate.

Day	Issue Date	Billing Amount	Page No.	Invoice ID	Credit ID	Credit	Delete
Monday	3 October 2022	81.16					
Thursday	6 October 2022	81.16					
Monday	10 October 2022	81.16					

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.

ID	Date	Customer	Amount	Tax	Total Amount	Balance	View PDF	
IN1518191T	1/31/2022	SNOWYS DOG FOOD	1,800.00	90.00	1,890.00	0.00		☒
IN1518192T	1/31/2022	SNOWYS DOG FOOD	7,500.00	0.00	7,500.00	0.00		☒
IN1518193T	2/16/2022	Verizon Communications, Inc	6,653.29	0.00	6,653.29	6,653.29		☒
			15,953.29	90.00	16,043.29	6,653.29		

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

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

Incentives Setup

- Multi-Product Incentives
 - Basic Settings
 - Notes
 - Qualifiers
 - Discount Rules
 - Application Rules
- Volume Spending Incentives
 - Basic Settings
 - Notes
 - Qualifiers
 - Discount Rules
 - Application Rules
- Insertion Frequency Incentives**
 - Basic Settings
 - Notes
 - Qualifiers
 - Discount Rules
 - Application Rules

Incentive Discount Rules

INCENTIVE DISCOUNT RULES TOP

- GROSS OR NET
Net
- APPLY TO LINER BASE RATE ONLY**
☒ Yes
This setting only impacts liner ads. If set to yes this will discount only the liner base rate and not the overage rate. For example a liner with a base of 50 words at \$10 and an overage of 0.50 per word would only discount off the base \$10.
- STARTING DAY FOR MAX DAYS PERIOD (OPTIONAL)
- MAX DAYS
- APPLY BASE ON MIN OR MAX COUNT IN CYCLE/PERIOD
Use Maximum Count

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.

Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... 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

Status: Q1 - Proposal

Incentives Status: **1 Available**

Adcellerant Proposal ID:

Adcellerant Budget: 0.00

Net Amount: 1,840.00

Estimated Tax: 92.00

Estimated Total: 1,932.00

Currency: Local Currency

Line Details Applied Incentives Tickets

Booking Wizard Quick Line Entry Alaska CLS Column-Inch 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	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Total	Ratecard Price Variance %
19940	Alaska Size: 2x1.5 Section: Main Position: Left	Cost Per Col Inch Listing 2 Column(s) by 1,500 inch(es) @		CPC1	12/2/2022	12/14/2022	1,840.00	---	---	---	---	---	---	---	---	---	---	---	1,840.00	0.00%
1,840.00																		1,840.00		

Click the “Check Incentives” button.

INCENTIVES FOR CAMPAIGN 8403

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
☒	Classified only NATS	Insertion Frequency Discount	- Product Group = Nature Pubs and Digital (NATS) - Ad Type = CLS Column-Inch (CPC) - Product = Alaska (AQ) - Format = Magazine (pub) (PUB) - NOTE: This Incentive applies to Base Rate only	2.00	1 - 2	-5.00%	-30.00	-7.00%	☐

INCENTIVE DISCOUNT - APPLIES TO THESE LINES

Already Taken	Line ID	Product ID	Product	Ad Type ID	Ad Type	Amount	Incentive Already Applied %
☐	19940	AK	Alaska	CPC	CLS Column-Inch	600.00	0.00%
						600.00	

Cancel **Apply Selected Incentives**

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

EDITING COST PER COLUMN-INCH LINE: 19940

Material **Insertion Details** **Category MetaData** **Other Options** **User Defined Fields** **Rep Assignments** **Affidavits**

Product: Alaska

Ad Type: CLS Column-Inch

Contract: [Dropdown]

Edition(s): [Dropdown]

Ratecard: Listing Classified

Rate Line: Cost Per Col Inch Listing

Description: Cost Per Col Inch Listing

Size Description: 2 Column(s) by 1,500 Inch(es)

Section: Main

Position: Left

G/L Type: Print Classified

Color: [Dropdown]

Base Price: 300.00

-- Included Column/Inches: 1.00

Overage Rate per Column/Inch: 310.00000

Additional Column/Inches: 2.00

Price per Insertion: 920.00

Adjustments: -15.00

Adjusted Price per Insertion: 905.00

Billing Total Amt: 1,810.00

Estimated Tax: 90.50

Estimated Total: 1,900.50

Line Details **Adjustments**

Select Issue Date(s) to add [Dropdown] +

Day	Issue Date	Billing Amount	Page No.	Invoice ID	Credit ID	Credit	Delete
Friday	2 December 2022	905.00				☐	☒
Wednesday	14 December 2022	905.00				☐	☒

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.

ID	Description	Gross/Net	Qty	Amount	Percent	Total Amount
---	Classified only NATS	Net			-5.00 %	-46.00

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.



SETUP INDIVIDUAL PORTAL ACCESS

Client ID	Client Name	
256368	Alaska Fishing	✖
255471	Coptic Church	✖
256414	Jeremiah the bullfrog	✖
255243	Minnesota Twins	✖

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.

site logo

You are logged in as: **Timmy Mc**
[Account Settings](#) | [Logout](#)

Messages Specials Invoices Orders Proposals Materials Settings

Specials Invoices Orders Proposals Materials Settings

Awaiting Signature | Signed Contracts

Advertiser Filter: -- All Advertisers --

Renewals

- 7812 Expired: 8/31/2022
- 8191 Expired: 9/20/2022

Proposals

- 8408
- 8409
- 8406
- 8407
- 8405

Wednesday, November 16, 2022

Change Start Date

Campaign No. Renewal of Campaign 7812

Today's Date 17 Oct 2022

P.O. Number 8888

Sales Rep Shirley High

bill-to advertiser

University of Iowa - IOWA city
12 Education Road
IOWA CITY, IA 52240
Tel: (800)665-4444
Account No: 256358

University of Iowa - IOWA city
12 Education Road
IOWA CITY, IA 52240
Tel: (800)665-4444
Account No: 256358

campaign summary		cost summary	
Description		Base Amount	\$17,432.00
Start Date	11/16/2022	Adjustments	\$0.00
End Date	4/16/2023	Gross Amount	\$17,432.00
Currency		Agency Commission	\$200.05
		Net Amount	\$17,231.95
		Estimated Tax	\$0.24
		Total	\$17,232.19

print lines

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	1,275	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 Church	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)”.

Campaigns

Production

Billing

Analysis

Setup

Logout

Activity

Product/Group Analy...

Product Analysis

Publication Analysis

Campaign Budget An...

Digital Delivery

PinPoint

Advertiser Ranking

Commission

Default Ad Server Team(s)

ID	Description	Default Team(s)
1	DFP 1	
TEST	TEST for SWN	
DFP2	DFP2	
DFP3	Newsycle DFP Server	
DFP4	NCS DFP	All companies and inventory
G360	NCS Google Premium	All entities

Advertiser Prefix

When automatically creating a new Advertiser or Agency, this option will use this field to prefix the name used in GAM.

Advertiser Suffix

When automatically creating a new Advertiser or Agency, this option will use this field as a suffix for the name used in GAM.

Delete

Cancel

Save

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.

Material ID: 3784

Date Received: Sunday, July 24, 2022

Material Type: Material for Digital Delivery

Material Desc.: Flags

Advertiser ID: 255073

Advertiser Name: Super Tutor

Expires On:

Proof Date:

External ID:

Pickup from ID (or Copied from ID):

ID on Ad Server: 123456

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”.

Selected Campaign Lines

Configure Output

ON SCREEN COLUMNS

Available Grid Columns

Selected Grid Columns

Excel Export Columns

Available Export Columns

Selected Export Columns

Click Save Configuration.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout									
Home	Sales Activity	Product/Group Analy...	Product Analysis	Publication Analysis	Campaign Budget An...	Digital Delivery	PinPoint	Advertiser Ranking	Commission
Filter by Ad Types Filter by Controllers Refresh Screen w/ Filters									
Selected Campaign Lines Configure Output									
Drag a column header and drop it here to group by that column									
Advertiser	Campaign	Production Form ID	Production Form Name	Production Form Status	Production Form Data Present	Production Form is Missing Required Data	Production Status ID	Production Status Description	Ad Server Creative IDs
Hoyte Travel, Inc.	8027	SH	SH	Form Not Started			2	Materials Edited and Reviewed	1234
Hoyte Travel, Inc.	8028	SH	SH	Form Not Started			1	Materials Needed	5678
J.W.Schultz	5148			No Form Assigned			3	Materials Produced	
J.W.Schultz	5150			No Form Assigned			2	Materials Edited and Reviewed	7890
J.W.Schultz	5152			No Form Assigned			2	Materials Edited and Reviewed	
Super Tutor	7955	FB	Facebook	Form Not Started			3	Materials Produced	

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".

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout									
Home	Sales Activity	Product/Group Analy...	Product Analysis	Publication Analysis	Campaign Budget An...	Digital Delivery	PinPoint	Advertiser Rank	
Sizes Select all values Section Select all values Order Sales Rep Select all values G/L Type Select all values Campaign Status Select all values Clear Hig									
Selected Campaign Lines Configure Output									
ON SCREEN COLUMNS					EXCEL EXPORT COLUMNS				
Reset Configuration Save Configuration					Reset Configuration Save Configuration				
Available Grid Columns Campaign P.O. Number Status Description Ad Server Line ID Client Type Brand Agency ID Agency Industry Code Industry Name Line Start Line End Issue ID Issue Description Color Caption ID					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. Line PO No Ratecard ID Ratecard Line ID Ratecard Line Desc Width in Points				
Selected Grid Columns Advertiser ID Advertiser Sizes Product Line ID Campaign Status ID Order Sales Rep(s) Line PO No Ratecard Line Desc Brand ID					Selected Export Columns Product Line ID Campaign Type Description Sizes Status ID Line Type Client Type				

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.

Main Menu

Ad Home

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Home

Sales Activity

Product/Group Analy...

Product Analysis

Publication Analysis

Campaign Budget An...

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

Sizes

Select all values

Section

Select all values

Order Sales Rep

Select all values

G/L Type

Select all values

Highlighting enabled

Clear Highlighting

Campaign Status

Select all values

Selected Campaign Lines

Configure Output

Confirmed

Reserved

Quoted

Amounts in Local Currency

1

2

3

4

5

6

7

8

9

10

...

»

Page: 1 of 21Go

Page size: 50Change

Item 1 of 1009

Advertiser ID	Advertiser	Sizes	Product	Line ID	Campaign	Status ID	Order Sales Rep(s)	Line PO No	Ratecard Line Desc	Brand ID
255073	Super Tutor	1 Page (8x11)	Astronomy	15726	5273	IS	Shirley High	7676767	1 Page	A2
255209	Metro Legal	1 Page (8x11)	Astronomy	15804	5286	IS	Shirley High	4343434	1 Page	A1
255095	Morton Construction	1 Page	Astronomy	18518	7837	IS	Shirley High	4343	1 Page	A1
255095	Morton Construction	1 Page	Astronomy	18517	7836	R3	Shirley High	4343	1 Page	A1
256358	University of Iowa - IOWA city		Astronomy	18464	7804	IS	Shirley High	323232		A1
256358	University of Iowa - IOWA city		Astronomy	18464	7804	IS	Shirley High	323232		A1
256358	University of Iowa - IOWA city		Astronomy	18464	7804	IS	Shirley High	323232		A1
244529	Arts Society	1 Page (8x11)	Astronomy	15817	5296	IS	Sean Connery	2323232	1 Page	MUS
255471	Coptic Church	Medium Rectangle	Blackfeet	15585	5212	IS	Shirley High		CPM	A1
255243	Minnesota Twins	3:1 Small Billboard	Blackfeet	15456	5163	CO	Shirley High		CPM	A1
255209	Metro Legal	Medium Rectangle, 3:1 Small Billboard	SH- Baked Goods	15633	5238	IS	Sean Connery		CPM	A1
255073	Super Tutor	Inserts	SPCA Magazine	15790	5273	IS	Shirley High		Inserts	A2

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.

Campaigns

Production

Billing

Analysis

Setup

Logout

Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget An...

Digital Delivery

PinPoint

ACCOUNT: A/R SETUP

Account Maintenance

Name and Address Setup

Employees / Contacts

Addresses

External Contacts

External System IDs

Account Overview

A/R Setup

Advertising Setup

Job Costing Setup

Newsstand Setup

Exhibition Setup

Subscription Setup

Channel Privacy Preferences

Attachments

Cards on File

Account Alerts

History of Changes

A/R Setup

Account ID

255095

Account Name

Morton Construction

A/R Details

Main Address ID

265920

Address

Morton Construction
89 Morton Road
Shirley's City, NY 10583
Tel: (914)333-2222

Account Type

Company

Client Group(s)

Shirley's client group (SH), Shirley's second group (SHG2)

On Credit Stop

☐ Check All
☐ FRANK'S TEST (FXS)
☐ JACKI'S TEST (JACKI)
☐ JFR CLIENT GR (JFR)
☐ MULTIPLE PRODUCT ADV (MULT)
☐ Ray's Group (RAY)
☒ Shirley's client group (SH)
☒ Shirley's second group (SHG2)
☐ TEST CLIENTS (TEST)
☐ new (new)

Account Approval Status

Monday, March 4, 2019 8:14 AM

Credit Stop Date

Account Opened

Last Updated

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.

Campaigns
Production
Billing
Analysis
Setup
Logout

Agency
Product/Group Analysis
Product Analysis
Publication Analysis
Campaign Budget Analysis
Digital Delivery
PinPoint

CLIENT TYPE DEFAULTS

Client Type Defaults

Client Type
Corporate Account

Client Defaults
These defaults are used when creating new Clients

Default Payment Terms
2% 10 DAYS

Default Tax Code
5 % TAX

Default Credit Limit
200,000.00

Default Credit Rating
Good

Credit Stop Days (Ad)
55

Default Customer Credit Control Status
First Call

Default Services Charges
☒ Yes

Default Show Due / Discount Date on Invoice
☒ Yes

Auto Approve New Clients
☒ Yes

Prepayment Required for Advertising Orders
Prepayment NOT Required

Cap Actuals
☐ No

Actuals Reconciliation
Use Third Party Numbers

Client Group
SH

Cancel
Save

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.

signs

NEW ADVERTISER

×

Company Setup

Employees

New Record Type

Advertiser

Account Name

Corporate America

Client Type

Corporate Account

PIB/Industry Code

Art - Galleries/Sales

Multiple Brands

No, This Advertiser Uses One Brand

Agency ID

Agency Name

Search

Billing Currency

International Tax ID

Sales Rep

Shirley High

Product Group(s)

Nature Pubs and Digital (NATS)

Phone No.

18006765555

Mobile

Fax

Website

Email

Country

UNITED STATES

Address

65 Corporate Road

Postal Code

55442

City

MINNEAPOLIS

State

MINNESOTA

Validate Address

Cancel

Create New Account

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

Production
Billing
Analysis
Setup
Logout

Product/Group Analysis
Product Analysis
Publication Analysis
Campaign Budget An...
Digital Delivery
PinPoint

ACCOUNT: A/R SETUP

Account Maintenance

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

A/R Setup

Account ID
256451

Account Name
Corporate America

A/R Details

Main Address ID
267499

Address
Corporate America
65 Corporate Road
MINNEAPOLIS, MN 55442
Tel: (800)676-5555

Account Type
Company

Client Group(s)
Shirley's client group (SH)

On Credit Stop
☐ No **In Good Standing**

Account Approval Status
Approved by Shirley High on Tuesday, October 18, 2022 6:36 PM

Approve Account

Credit Stop Date

Account Opened
10/18/2022

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.

NEW CAMPAIGN

Campaign Explorer

- 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
 - Production Contacts
 - Tearsheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments

Campaign Setup

Other Information

Campaign ID: New Campaign

Campaign Billing Type: Performance Campaign

Campaign Description:

Advertiser ID:

Advertiser Name:

Advertiser Address:

Client Type:

Brand:

Agency / Bill-to:

Start Date:

End Date:

Run until cancel: No

Name ID	Client ID	Name	Client Type	City	State/Region	Postal Code	Country
102354	BETH	BROOKLINE MOTORS					
255341	255341	Burlington Textiles Corp of America	M	Burlington	NC	27215	US
255488	255488	St. George Church		MINNEAPOLIS	MN	55442	US
244534	244534	J.W.Schultz	S	Winkler	MB	R6W 4B2	CA
255478	255478	Copt Yogurt		MINNEAPOLIS	MN	55445	US
258399	258399	Professor Egypt Language		Tarrytown	NY	10590	US
258400	258400	Professor French Language		Tarrytown	NY	10590	US
220779	220779	UNIVERSITY OF MINNESOTA		SAINT PAUL	MN	55108	US
244529	244529	Arts Society		PLEASANTVILLE	NY	10570	US
255342	255342	Adelson Painting		MINNEAPOLIS	MN	55442	US
244719	244719	Adorbs Paper Towels		Beijing		102300	CN

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.

QUICK CAMPAIGN ENTRY

CAMPAIGN DESCRIPTION:

ADVERTISER ID: 255341

ADVERTISER NAME: Burlington Textiles Corp of America

CLIENT TYPE: National (M)

BRAND:

AGENCY NAME:

CONTACT:

ORDER STATUS: Confirmed-Ready to Bill

PRODUCT:

AD TYPE:

PRODUCTION CONTROLLER: Leave Blank to Use Default

ORDERS I ENTERED

Start Date: 10/27/2022 End Date: 10/27/2022 Refresh Data

Selected Campaigns: Configure Output

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

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

Date	Product	Line ID	Campaign	Type	Description	Sizes	Campaign Status	Advertiser	Brand	Agency	Product	Order Status	Est. Qty	Est. Gross Amount	Est. Net Amount	Qty Served	Actual Qty	Actual Gross Amount	Actual Net Amount
Records Returned --																			

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.

PRODUCT G/L OVERRIDES

Product: SPCA 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
Cost G/L Code	01*20*2500*50*7400	Cost of Sales
Cash A/P Code	01*00*0000*00*2100	ACCOUNTS PAYABLE

G/L Type Overrides

Add an Override

G/L Type	Revenue G/L Code	Agency Comm. G/L Code	Cost G/L Code	Cash A/P Code
New Print Display	01*00*0002*00*0000	01*00*0007*00*0000	01*00*0000*00*0004	01*00*0000*00*0123
	WEBSITE REVENUE	Agency Commission	COST OF SALES	CASH - LASALLE BANK

Industry Code Overrides

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.

LINE SETTINGS

Line ID	Line Description	Ad Type	G/L Type	G/L Project	Default Production Status	Production Link	Default Production Form	External ID	Minimum Depth	Maximum Depth	Unit of Measure	Use Columns Count in Calculation	Rate	Cost Rate	Default Quantity	Lines	Columns	Inches	Allow Description Override	No Tax	Only Allow this Rate on Packages	Cancel at Full Value	Is Inactive
982	1 Page	New Display	New Print Display								Inches	No	333.00000	100.00000	1	420.000			No	No	No	No	

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.

paings Production Billing Analysis Setup Logout

Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint Advertiser

Attachments

Other Details

Payment Details - Local Currency Foreign Currency

G/L Details - Local Currency Foreign Currency

G/L Code	G/L Description	Debit Amount	Credit Amount
01*00*0000*00*0148	ACCOUNTS RECEIVABLE	350.80	0.00
01*00*0002*00*0000	WEBSITE REVENUE	0.00	333.00
01*00*0000*00*0004	COST OF SALES	100.00	0.00
01*00*0000*00*0123	CASH - LASALLE BANK	0.00	100.00
01*00*0000*00*0160	FEDERAL PREPAID TAXES	0.00	17.80

Order Details

ID	Module	Product	MM Contract
8420	INET	Nature Pubs and Digital	

Email History

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

mpaings Production Billing Analysis Setup Logout

Product/Group An... Product Analysis Publication Analysis Campaign Budget ... Digital Delivery PinPoint Adver

Journal Entry Detail

Journal ID	1.8421.2	Total Debits	1,847.00
Type	GJ	Total Credits	1,847.00
Period	2022-12	Date Entered	10/24/2022
Reversal Period		Date Posted	
External ID		Entered By	SHIGH
Comment	ESTIMATE ENTRY - INTERNET CAMPAIGN 8421		

G/L Allocations

G/L Account ID	G/L Account Description	Debit Amount	Credit Amount
01*00*0002*00*0090	DEFERRED WEB REVENUE	333.00	0.00
01*00*0002*00*0000	WEBSITE REVENUE	0.00	333.00
01*00*0000*00*0004	COST OF SALES	100.00	0.00
01*00*0000*00*0123	CASH - LASALLE BANK	0.00	100.00
01*00*0002*00*0090	DEFERRED WEB REVENUE	1,414.00	0.00
01*00*0002*00*0000	WEBSITE REVENUE	0.00	1,414.00

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.

EDITING COST PER THOUSAND LINE: 19990

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

Product: Blackfeet Section: Cultural Ratecard CPM Rate: 20.00000

Ad Type: Cost Per Thousand Position: IMP2022 Adjustments: 0.00000

Contract: G/L Type: CPM Discount Rate: 20.00000

Ratecard: 2022 Material Status: Materials Needed Estimated Impressions: 100,000

Ratecard Line ID: 884 Estimated Amount: 2,000.00

Description: CPM Estimated Tax: 100.00

Estimated Total: 2,100.00

Line Details Tracking Services Engagement Tracking Adjustments

Start: 11/1/2022 12:00 AM End: 1/31/2023 12:00 AM Total Days: 92 Proportion Values: by Number of Days in Month

Month	Days	Available	Estimated Imps.	Estimated Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Actual Amount	Invoice	Credit	Credit
Nov 2022	30	1,698,225	32,609	652.17	0	0	0		40,000	0	800.00			
Dec 2022	31	1,799,775	33,696	673.91	0	0	0		45,000	0	900.00			
Jan 2023	31	99,999	33,695	673.92	0	0	0		30,000	0	600.00			

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.

Customers Campaigns Production Billing Analysis Setup Logout

Sales Activity Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint Advertiser Ranking Commissions

Ad Type: Specific Campaign IDs: 8430

Selected Campaigns

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

Campaign	Advertiser	Brand	Agency	Billing Group	Product Group	Line ID	Product	Line Start	Line End	Line Type	Currency	Est. Amount	Actual Amount	Agency Comm.	Tax Amount	Net Amount	Pre-Paid	Auto Pay	P.O. Number	Delivery Method	
8430	Coptic Church	Festivals		NATS	19990	Blackfeet	11/1/2022	11/30/2022	CPM			652.17	800.00	0.00	40.00	840.00	N	N		Email & Print	☒
8430	Coptic Church	Festivals		NATS	19990	Blackfeet	12/1/2022	12/31/2022	CPM			673.91	900.00	0.00	45.00	945.00	N	N		Email & Print	☒
8430	Coptic Church	Festivals		NATS	19990	Blackfeet	1/1/2023	1/31/2023	CPM			673.92	600.00	0.00	30.00	630.00	N	N		Email & Print	☒
												2,000.00	2,300.00	0.00	115.00	2,415.00					

Page: 1 of 1 Go Page size: 3 Change

Reset Save

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.

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout																			
Home		Sales Activity		Product/Group Analy...		Product Analysis		Publication Analysis		Campaign Budget An...		Digital Deliver		Advertiser Ranking		Commission			
Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server Qty Served	Ad Server Viewable Qty Served	Clicks Served	Clicks	Clicks	Actual Qty	Actual Clicks
5170	19444.1	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	7/27/2022	7/31/2022	CPM	Ad Server	☐	20.00000	139	2.78	0	0	0	0	0	2,000	0
5170	19444.2	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	8/1/2022	8/31/2022	CPM	Ad Server	☐	20.00000	861	17.22	0	0	0	0	0	1,500	30.00

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.

EDITING COST PER THOUSAND LINE: 19992

Pricing

Other

Google Ad Manager

Expected Sizes

Creatives

Custom Fields

Production Notes

Category MetaData

Sales Rep(s)

Product

Blackfeet

Section

Cultural

Ratecard CPM Rate

20.00000

Ad Type

Cost Per Thousand

Position

IMP2022

Adjustments

0.00000

Contract

G/L Type

CPM

Discount Rate

20.00000

Ratecard

2022

Material Status

Estimated Impressions

50,928

Ratecard Line ID

884

Estimated Amount

807.95

Description

CPM

Estimated Tax

40.40

Estimated Total

848.35

Line Details

Tracking Services

Engagement Tracking

Adjustments

Start

11/1/2022

12:00 AM

End

12/31/2022

12:00 AM

Total Days

61

Proportion Values

by Number of Days in Month

Month	Days	Available	Estimated Imps.	Estimated Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Actual Amount	Invoice	Credit	Credit
Nov 2022	30	1,631,922	30,398	397.35	0	0	0		0	0	0.00			☐
Dec 2022	31	1,667,383	20,530	410.60	0	0	0		0	0	0.00			☐

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

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

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

Campaign Type: Performance | Product Group: Nature Pubs and Digi | Group Selection: Use Group on Cai | Line Types: Cost Per Thousand | Specific Campaign ID: | From Date: 11/1/2022 | Through Date: 12/31/2022 | Exclude Lines w/ Actuals: No | Exclude Lines w/o External ID: No | Get Campaigns

Selected Campaigns

Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server Qty Served	Ad Server Viewable Qty Served	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks
8432	19992.1	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	11/1/2022	11/30/2022	CPM	Ad Server	☐	20.00000	30,3	397.3	0	0	0	0	0	0	0	60,000	1,200.00
8432	19992.2	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	12/1/2022	12/31/2022	CPM	Ad Server	☒	20.00000	20.5	410.6	0	0	0	0	0	0	0	0	0.00
										50,928	807.95	0	0	0	0	0	0	0	0	60,000	1,200.00

Entered 60,000 before 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.

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

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

Campaign Type: Performance | Product Group: Nature Pubs and Digi | Group Selection: Use Group on Cai | Line Types: Cost Per Thousand | Specific Campaign ID: | From Date: 11/1/2022 | Through Date: 12/31/2022 | Exclude Lines w/ Actuals: No | Exclude Lines w/o External ID: No | Get Campaigns

Selected Campaigns

Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Ad Server Qty Served	Ad Server Viewable Qty Served	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks	Actual Amount	Run of Network	Apply
8432	19992.1	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	11/1/2022	11/30/2022	CPM	Ad Server	0	0	0	0	0	0	0	60,000	0	1,200.00		☐
8432	19992.2	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	12/1/2022	12/31/2022	CPM	Ad Server	0	0	0	0	0	0	0	0	0	0.00		☐
										50,928	807.95	0	0	0	0	0	60,000	0	1,200.00	

CONFIRMATION

Would 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.

NOTE: This does not apply to Date-Based Product lines (e.g. E-Newsletters).

Yes No

Apply Quantity Served

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.

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[Ad Home](#)
[Customers](#)
[Campaigns](#)
[Production](#)
[Billing](#)
[Analysis](#)
[Setup](#)
[Logout](#)

[Home](#)
[Sales Activity](#)
[Product/Group Analysis](#)
[Product Analysis](#)
[Publication Analysis](#)
[Campaign Budget An...](#)
[Digital Delivery](#)
[PinPoint](#)
[Advertiser Ranking](#)
[Commissions](#)

RECONCILE CAMPAIGN ACTUALS

Campaign Type: Performance | Product Group: Nature Pubs and Digital | Group Selection: Use Group on Cai | Line Types: Cost Per Thousand | Specific Campaign ID: | From Date: 11/1/2022 | Through Date: 12/31/2022 | Exclude Lines w/ Actuals: No | Exclude Lines w/o External ID: No | [Get Campaigns](#)

Selected Campaigns

Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server Qty Served	Ad Server Viewable Qty Served	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks	Actual Amount	Run of Network	Apply
8432									☐															☐
8432	19992.1	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	11/1/2022	11/30/2022	CPM	Ad Server	☐	20.00000	60,000	1,200.00	0	0	0	0	0	0	0	60,000	0	1,200.00		☐
8432	19992.2	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	12/1/2022	12/31/2022	CPM	Ad Server	☒	20.00000	-9,072	-392.05	0	0	0	0	0	0	0	0	0	0.00		☐
										50,928	807.95		0	0	0	0	0	0	0	60,000	0	1,200.00		

[Reset](#)
[Save Actuals](#)

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.

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[Commissions](#)

RECONCILE CAMPAIGN ACTUALS

Campaign Type: Performance | Product Group: Nature Pubs and Digital | Group Selection: Use Group on Cai | Line Types: Cost Per Thousand | Specific Campaign ID: | From Date: 11/1/2022 | Through Date: 12/31/2022 | Exclude Lines w/ Actuals: No | Exclude Lines w/o External ID: No | [Get Campaigns](#)

Selected Campaigns

Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server Qty Served	Ad Server Viewable Qty Served	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks	Actual Amount	Run of Network	Apply
8432									☐															☐
8432	19992.1	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	11/1/2022	11/30/2022	CPM	Ad Server	☐	20.00000	60,000	1,200.00	0	0	0	0	0	0	0	60,000	0	1,200.00		☐
8432	19992.2	Minnesota Twins Baseball Cards	Blackfeet (BF)	CPM	12/1/2022	12/31/2022	CPM	Ad Server	☒	20.00000	-9,072	-392.05	0	0	0	0	0	0	0	10,000		-392.05		☐
										50,928	807.95		0	0	0	0	0	0	0	70,000	0	807.95		

[Reset](#)
[Save Actuals](#)

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.

EDITING COST PER THOUSAND LINE: 19429

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

Product: Blackfeet Section: Cultural Ratecard CPM Rate: 10.00000

Ad Type: Cost Per Thousand Position: IMP2022 Adjustments: 0.00000

Contract: G/L Type: CPM Discount Rate: 10.00000

Ratecard: 2022 Group Digital Material Status: Estimated Impressions: 10,000

Ratecard Line ID: 911 Estimated Amount: 100.00

Description: CPM Estimated Tax: 5.00

Estimated Total: 105.00

Line Details Tracking Services Engagement Tracking Adjustments

Start: 7/27/2022 12:00 AM End: 10/6/2022 12:00 AM Total: Number of Days in Month

Month	Days	Available	Estimated Imps.	Estimated Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Actual Amount	Invoice	Credit	Credit
Jul 2022	5	1,997,233	694	6.94	0	0	0		1,000	0	6.94			
Aug 2022	31	1,857,914	4,306	43.06	0	0	0		5,000	0	43.06			
Sep 2022	30	1,844,770	4,167	41.67	0	0	0		5,000	0	41.67			
Oct 2022	6	1,542,887	833	8.33	0	0	0		12,000	0	8.33			

Actual Amounts per line stay the same for each line as the Estimated Amounts.

Actual Impressions are different than Estimated Impressions.

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

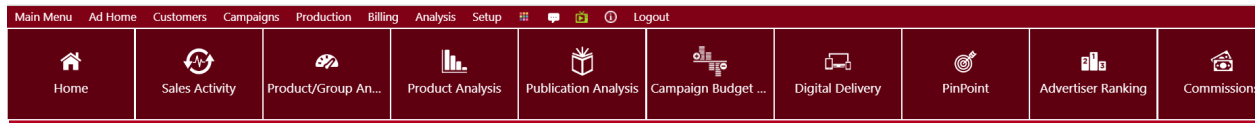
Campaign	Line ID	Advertiser / Brand	Product	Line Desc.	Line Start	Line End	Line Type	Reconcile to	Cap Actuals	Rate	Est. Qty	Est. Amount	Ad Server Qty	Ad Server Viewable Qty	Clicks Served	3rd Party Qty	3rd Party Clicks	4th Party Qty	4th Party Clicks	Actual Qty	Actual Clicks	Actual Amount	Run of Network	Apply
7854	19547.1	University of Iowa - Iowa City Books	Blackfeet (BF)	CPM	4/1/2022	4/30/2022	CPM	Ad Server	☒	20.00000	33	0.66	0	0	0	0	0	0	0	1,000	0	0.66		
7854	19547.2	University of Iowa - Iowa City Books	Blackfeet (BF)	CPM	5/1/2022	5/31/2022	CPM	Ad Server	☒	20.00000	34	0.68	0	0	0	0	0	0	0	3,000	0	0.68		
7854	19547.3	University of Iowa - Iowa City Books	Blackfeet (BF)	CPM	6/1/2022	6/30/2022	CPM	Ad Server	☒	20.00000	33	0.66	0	0	0	0	0	0	0	200	0	0.66		

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.



MATERIAL MANAGEMENT FOR PRINT DISPLAY AND ISSUE-BASED PRODUCTS

Advertiser ID: 255243 Advertiser Name: Minnesota Twins Start Date: Saturday, January 1, 2022 End Date: Saturday, December 31, 2022 Get Data

Insertions

Selected Size: 1 Page Consolidate Issue Dates: ☐ No ☒ Yes Show Lines With Material ID: ☒ Yes Attach Existing Material: Create New Material

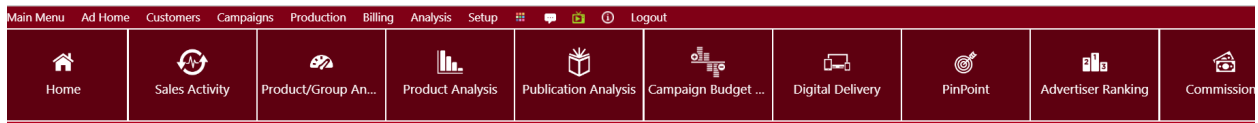
Campaign ID	Line ID	Product ID	Product Name	Issue Date	Pick-up Material	Material	Material Status	Invoice ID
5265	19566	AST	Astronomy	Saturday, January 8, 2022			New	
5297	15819	AST	Astronomy	Saturday, January 22, 2022		3055	New	
5265	19566	AST	Astronomy	Saturday, February 5, 2022			New	
5265	19566	AST	Astronomy	Monday, February 28, 2022			New	
7761	18372	AST	Astronomy	Wednesday, March 2, 2022		3185	New	
7794	18451	AST	Astronomy	Wednesday, March 2, 2022		3243	New	
7861	18720	AST	Astronomy	Saturday, April 2, 2022		3272	New	
7861	18722	AST	Astronomy	Saturday, April 2, 2022		3055	New	
7861	18830	AST	Astronomy	Saturday, April 2, 2022		3272	New	

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.



TICKET TEAMS

Ticket Setup Tables

- Campaign Tickets Setup
 - Ticket Teams**
 - Master Ticket Status Codes
 - Ticket Status Code Groups
 - Ticket Types
 - Ticket Priorities
 - Ticket Workflow Routing

Ticket Team

Team ID: SH Team Name: Shirley Operational Team

Send Emails to Group: ☒ Yes

Team Members

ID	Name
AM	ALLEN MARKS
CSTRAYED	Cheryl Strayed
MARK	Mark Copt
WBURROWS	Wayne Burrows

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.

NEW TICKET FOR CAMPAIGN 8452

Ticket Type: Operational Ticket Type
Priority: Medium
Status: Open
Assigned Team: Shirley Operational Team
Assigned User: Shirley High

Short Description: Please review for accuracy
Team Owner:
User Owner: Shirley High

Long Description:
 Review needed

Notes | **Regarding Line Items** | **(Other) Line Items** | **History of Changes** | **Attachments**

Remove Selected Lines

ID	Product	Description
20026	Alaska Size: 1x3 Section: Main Position: Left	Col Display

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.

Ticket 38 has been assigned to you

 shigh@mssl.com
 To: Shirley High

 Reply
  Reply All
  Forward

Thu 11/3/2022 11

Links and other functionality have been disabled in this message. To turn on that functionality, move this message to the Inbox.

Naviga WARNING: External email. Please verify sender before opening attachments or clicking on links.

Advertiser: Minnesota Twins
 Campaign: 8452
 Campaign Start: 12/01/2022
 Campaign End: 12/31/2022
 Campaign Status: Q1 - Proposal

Ticket Desc: Review required

Click on the link below to view your assigned tickets...

<https://dev.navigahub.com/ew/digital2022.5/ad/tickets>

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

COUNTRY SETUP

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.

ion Billing Analysis Setup Logout

ct/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint

International Tax ID

VAT Validation Status Not Validated/Valid

Validate VAT

Currency FRENCH FRANC

Territory

Sales Tax Exemption No.

Sort Order

Registered Company Number

Default Billing

Preferred Forms Language French

Tax Code 5 % TAX

Terms NET 30 DAYS

Show Due Date No

Billing Contact Type Select an Existing Contact

Billing Contact

Misc. Billing Details

Delivery Method Print

Company	Name	Title	Phone	Email
-- No Records --				

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.

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

COUNTRY SETUP

Address Setup

Country Groups
Country Setup
State / Region Setup
County Setup
Zip / Postal Code Setup
Zip / Postal Code Import
Time Zone Setup
Address Type Setup

Country Setup

Country ID
FR
New
Delete
Country Name
FRANCE
Continent
Europe
Country Group
FOREIGN
Default Time Zone
Greenwich Mean Time
Sort No.
999

Other Codes / IDs

ISO 3 Code
ISO 2 Code
ISO Number
IATA Number

Other Settings

Currency
EURO €
E.E.C. Member
☒ Yes
E.E.C. Country Code
Y
Preferred Forms Language
French
International Tax ID Required for Approval
☒ Yes
Registered Company No. Required for Approval
☒ Yes

Address / Phone Settings

International Dial Prefix
011
International Country Code
331
Require Zip/Postal Code
☐ No
Require Valid Zip/Postal Code
☐ No

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.

Page 38 of 64

The screenshot shows the 'CHANGE CAMPAIGN STATUS' pop-up window. The 'Current Status' is 'Q1 - Proposal' and the 'New Status' is also 'Q1 - Proposal'. Below this is a table titled 'CAMPAIGN STATUS MESSAGES' with the following content:

Type	Message
Exception	The Bill-to Account on this order has not yet been approved Click here to Approve this Account

At the bottom of the pop-up are 'Cancel' and 'Change Status' buttons. The background shows the 'EDITING CAMPAIGN 8467' screen with various campaign details and a sidebar menu.

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.

The screenshot shows the 'ACCOUNT APPROVALS' pop-up window. It contains the following fields:

- Account Name:** French Brie Cheese
- Account ID:** 256477
- Address:** 32 French Cheese Road, FR
- Date Created:** Tuesday, November 8, 2022
- Created By:** Shirley High (SHIGH)
- Approval Priority Code:** (empty field)
- International Tax ID:** 43432422
- Registered Company Number:** 989898

At the bottom are 'Cancel' and 'Approve Account' buttons. Two purple arrows point from the 'International Tax ID' and 'Registered Company Number' fields towards the 'Approve Account' button. The background shows the 'EDITING CAMPAIGN 8467' screen.

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.

CHANGE CAMPAIGN STATUS

Current Status: Q1 - Proposal New Status: Confirmed - Ready to Invoice

CAMPAIGN STATUS MESSAGES

Type	Message
-- No Messages --	

CASH ON ACCOUNT

ID	Date	Amount
-- No Records --		

EDITING CAMPAIGN 8467

Campaign Explorer

- Campaign
 - Campaign Setup
 - Line Items
 - Material Management
 - Edit CPM Delivery
 - Campaign Budget
 - Campaign Custom Data Forms
 - Digital Serving Analysis
 - Co-op Billing
 - User Defined Fields
 - Notes / Comments
 - Revenue Allocation
 - Production Contacts
 - Tearsheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments
 - Rep Commissions
 - History of Changes

Campaign Setup

Campaign ID: _____

Campaign Billing Type: _____

Campaign Description: _____

Advertiser ID: _____

Advertiser Name: _____

Advertiser Address: _____

Client Type: _____

Brand: _____

Agency / Bill-to: _____

Billing Contact: _____

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.

CAMPAIGN DETAILS

Advertiser ID: 256479 Advertiser Name: French Vanilla

Advertiser Address: French Vanilla
65 Champs Elysee Road
Paris, FRANCE
Tel: 011 331 8007675555

Client Type: National Account (NAT)

Brand: French Vanilla

Agency / Bill-to: (256479) French Vanilla

Billing Contact: _____

Billing Address: French Vanilla
65 Champs Elysee Road
Paris, FRANCE
Tel: 011 331 8007675555

Product Group: Nature Pubs and Digital

Order Contact: _____

Production Controller: Shirley High

Campaign Manager: _____

ERROR

This account requires approval before an order can be created. Would you like to Approve it now?

OK Cancel

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

Production Billing Analysis Setup Logout

Product/Group Analy... Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint

Campaign Description Run until cancel ☐ No

Advertiser ID 256479 Gross Amount 0.00

Advertiser Name French Vanilla 0.00

Advertiser Address 0.00

Client Type National 0.00

Brand French 0.00

Agency / Bill-to (25647) 0.00

Billing Contact FRENCH FRANC FC

Billing Address 0.00

Product Group Nature

Order Contact

Production Controller Shirley

Campaign Manager

ACCOUNT APPROVALS

Account Name French Vanilla Account ID 256479

Address 65 Champs Elysee Road
Paris
FR

Date Created Tuesday, November 8, 2022

Created By Shirley High (SHIGH) Approval Priority Code

International Tax ID 323232 Registered Company Number 90900909

Cancel Approve Account

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.

Main Menu Customers Invoices Credit Control Payments Statements Reporting Setup Logout

ACCOUNT APPROVALS

Created by User Shirley High Created Date From 1/1/2022 Created Date Through 12/31/2022 Approval Status Pending Approval Get Data

Accounts

ID	Name	International Tax ID	Registered Company Number	Created Date	Created by User	Address	Approval Priority Code
256481	French Creme de la creme	098-909-9998	787-989-5555	11/10/2022	Shirley High	44 Rue de Creme Province FR	☐

Is in Elma Registry: No

Approve Selected

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.

The screenshot shows the 'General / Company Security' configuration page for the 'WOMENFIRST' group. The 'Main Menu Shortcuts' section is active, displaying a table for creating shortcuts. A purple arrow points to the 'Title' column header, and another points to the '+' icon in the bottom right of the table to add a new row.

Title	Description	URL	Text Color	Background Color	Wide	
Contractor Link	Contractors Link	https://www.navigaglobal.com/	[Red]	[Cyan]	☒	[X]
Research Links	Birds	https://allaboutbirds.org	[Purple]	[Yellow]	☐	[X]
Education	The U	https://umn.edu	[Green]	[Dark Red]	☐	[X]
[Title]	[Description]	[URL]	[Green]	[Dark Red]	☐	[+]

Buttons: Cancel, Save

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.

The screenshot shows the 'Main Menu' screen for user Cheryl Strayed. The configured shortcut tiles are visible, including 'Contractors Link' (cyan), 'Birds' (yellow), 'The U' (dark red), 'Research Links' (yellow), and 'Education' (dark red). An orange circle highlights these shortcut tiles.

Main Menu • Naviga™ 2023.1

Cheryl Strayed
Data Account: DEVDIGITAL

Home, My Customers, CRM To-Do's (0), CRM Opportunities (4), My Lists, My Commissions, CRM Proposals (0), My Orders, Reports, CRM Alerts (0), Add a shortcut, Remove shortcut(s), Ad Home, Advertising

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.

The screenshot shows the 'Group Security' settings page. On the left is a navigation tree with 'A/R Security' selected. The main area displays a list of security flags, each with a checkbox and a 'Yes' button. The flags are numbered 2 through 8. Flag 8, 'FORCE CURRENCY ON NEW ACCOUNTS TO COUNTRY SETTING', is highlighted with a purple arrow pointing to its 'Yes' button.

Flag Number	Flag Description	Current Value
2	ALLOWED TO TRANSFER INVOICES TO ANOTHER CLIENT	Yes
3	ALLOWED TO TRANSFER INVOICES TO A COLLECTIONS AGENCY	Yes
4	DISPLAY CASH IN/OUT SUMMARY ON A/R HOME PAGE	Yes
5	ALLOW CHANGES TO MISC. INVOICE DESCRIPTIONS AFTER POSTED TO A/R	Yes
6	ALLOW ENTRY / CREATION OF SALES REP ADJUSTMENTS FROM INVOICE DETAIL SCREEN	Yes
7	ONLY ALLOW SELECTION OF BANKS FOR COMPANIES THIS GROUP HAS ACCESS TO	No
8	FORCE CURRENCY ON NEW ACCOUNTS TO COUNTRY SETTING	Yes

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.

Action		Billing	Analysis	Setup	Logout
Product/Group Analysis	Product Analysis	Publication Analysis	Campaign Budget Analysis	Digital Delivery	PinPoint

Country Setup
 State / Region Setup
 Country Setup
 Zip / Postal Code Setup
 Zip / Postal Code Import
 Time Zone Setup
 Address Type Setup

Country Name	FRANCE
Continent	Europe
Country Group	FOREIGN
Default Time Zone	Greenwich Mean Time
Sort No.	999

Other Codes / IDs	
ISO 3 Code	
ISO 2 Code	FR
ISO Number	
IATA Number	

Other Settings	
Pricing Group	FOREIGN
Tax Region	VAT (VAT)
Currency	EUROS
E.E.C. Member	☒ Yes
E.E.C. Country Code	Y
Date Format	International
Domestic / Foreign	Foreign
Preferred Forms Language	French

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.

mpaigns NEW ADVERTISER

Company Setup **Employees**

New Record Type
Advertiser

Account Name
French Bakery

Client Type **PIB/Industry Code**
Food & Beverage

Multiple Brands
No, This Advertiser Uses One Brand

Agency ID **Agency Name** **Search**

Billing Currency
EUROS

International Tax ID

Phone No.

Mobile **Fax**

Website

Email

Country
FRANCE

Address

Postal Code

City

State

Validate Address **Cancel** **Create New Account**

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

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

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget An... Digital Delivery PinPoint

FRENCH BAKERY

Sales CRM Ad Production Accounting Customer Service Exhibition Sales Subscriptions Newsstand Sales

Overview **MediaRadar** **Other** **Rep Access**

Account ID
262956

Account Status
In Good Standing

Account Type
Customer

Credit Limit
0.00

Parent Account

Account Balance
0.00

Website

Card(s) on File
No

Telephone

Billing Currency
EUROS

Source(s)

Account Approval Status
Change
Pending Approved, No Priority

Map **Addresses** **My Contacts**

Address **Country** **Modules**

43 French Bakery Road
Paris
FRANCE
Tel:

FRANCE AD, EX, AR

Sales by Year **Sales by Product** **Sales by Format** **Sales by**

NOTE: Numbers shown are for Confirmed orders only, except for the current:

Year

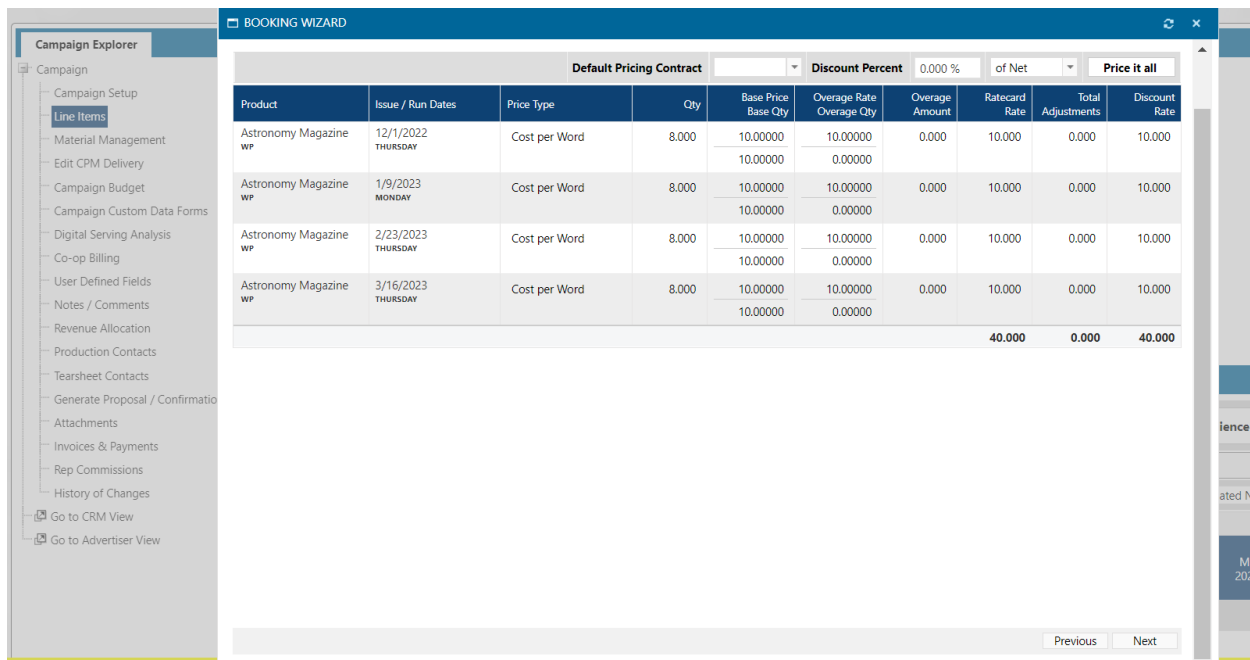
2023
2022
2021
2020
2019
2018
2017

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).

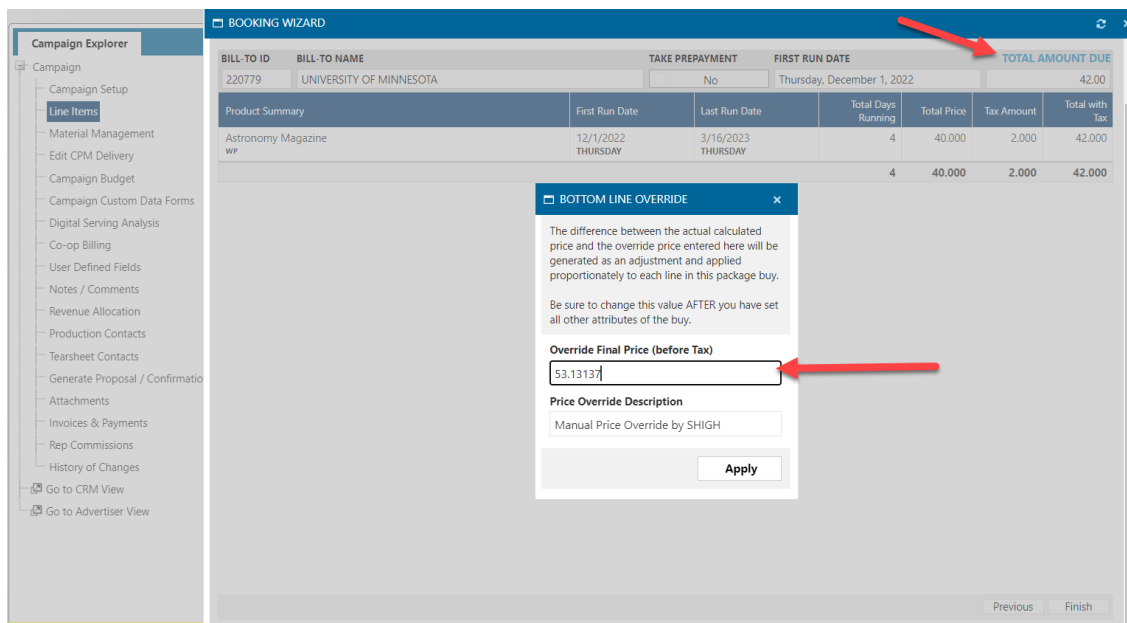
Navigate to create a campaign using the Booking Wizard with multiple lines.



The screenshot shows the 'BOOKING WIZARD' interface. On the left is a 'Campaign Explorer' sidebar with various options like 'Campaign Setup', 'Material Management', etc. The main area displays a table of line items under the heading 'Default Pricing Contract'. The table has columns for Product, Issue / Run Dates, Price Type, Qty, Base Price, Base Qty, Overage Rate, Overage Qty, Overage Amount, Ratecard Rate, Total Adjustments, and Discount Rate. There are four rows of data for 'Astronomy Magazine WP' with different run dates (12/1/2022, 1/9/2023, 2/23/2023, 3/16/2023). The 'Total' row at the bottom shows a total of 40,000 for the Base Price, 0.000 for Total Adjustments, and 40,000 for the Discount Rate. At the bottom right, there are 'Previous' and 'Next' buttons.

Product	Issue / Run Dates	Price Type	Qty	Base Price	Base Qty	Overage Rate	Overage Qty	Overage Amount	Ratecard Rate	Total Adjustments	Discount Rate
Astronomy Magazine WP	12/1/2022 THURSDAY	Cost per Word	8,000	10.00000		10.00000		0.000	10.000	0.000	10.000
Astronomy Magazine WP	1/9/2023 MONDAY	Cost per Word	8,000	10.00000		10.00000		0.000	10.000	0.000	10.000
Astronomy Magazine WP	2/23/2023 THURSDAY	Cost per Word	8,000	10.00000		10.00000		0.000	10.000	0.000	10.000
Astronomy Magazine WP	3/16/2023 THURSDAY	Cost per Word	8,000	10.00000		10.00000		0.000	10.000	0.000	10.000
				40.000		0.000		40.000			

Click Next until you reach the last tab.



The screenshot shows the 'BOOKING WIZARD' interface with the 'BOTTOM LINE OVERRIDE' dialog box open. The dialog box contains the following text: 'The difference between the actual calculated price and the override price entered here will be generated as an adjustment and applied proportionately to each line in this package buy. Be sure to change this value AFTER you have set all other attributes of the buy.' Below this text is a field for 'Override Final Price (before Tax)' with the value '53.13137' entered. There is also a field for 'Price Override Description' with the value 'Manual Price Override by SHIGH'. An 'Apply' button is at the bottom of the dialog box. A red arrow points to the 'Next' button in the top right corner of the wizard, and another red arrow points to the 'Override Final Price (before Tax)' field.

BILL TO ID	BILL TO NAME	TAKE PREPAYMENT	FIRST RUN DATE	TOTAL AMOUNT DUE
220779	UNIVERSITY OF MINNESOTA	No	Thursday, December 1, 2022	42.00

Product Summary	First Run Date	Last Run Date	Total Days Running	Total Price	Tax Amount	Total with Tax
Astronomy Magazine WP	12/1/2022 THURSDAY	3/16/2023 THURSDAY	4	40.000	2.000	42.000
			4	40.000	2.000	42.000

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 screenshot shows the 'Advertising Orders' section of a software interface. The main table displays advertising orders with columns for Line Group, ID, Product, Description, Copy, Ad Type, Start Date, End Date, and various months from Dec 2022 to Mar 2023. A red arrow points to the 'Total' column for line 1, which shows a value of 53.13. Below the table, there are sections for 'Linked Exhibition Orders' and 'Attach an Exhibition Order'.

Line Group	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Dec 2022	Jan 2023	Feb 2023	Mar 2023	---	---	Total	Ratecard Price Variance %
1	29808	Astronomy Magazine	Per Word	LCW	12/1/2022	2/23/2023	13.28	13.28	13.28	0.00	---	---	39.84	+32.80%	
1	29809	Astronomy Magazine	Per Word	LCW	3/16/2023	3/16/2023	0.00	0.00	0.00	13.29	---	---	13.29	+32.90%	
								13.28	13.28	13.28	13.29			53.13	

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.

The screenshot shows the 'BOOKING WIZARD' interface. A warning dialog box is displayed in the center, stating: "*** WARNING *** This group of lines includes a bottom-line override price of \$3.13. This/these pricing override(s) have been removed. After you have modified this booking, you will need to reapply these overrides, if still relevant." The background shows the 'Product Selection' tab with a table of products and their prices.

Product	Layout	Delete
Astronomy Magazine	6-Column Layout (max columns 8) ec	X
Astronomy Magazine	6-Column Layout (max columns 8) ec	X
Astronomy Magazine	6-Column Layout (max columns 8) ec	X
Astronomy Magazine	6-Column Layout (max columns 8) ec	X

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.

The screenshot shows the Naviga Plan interface. At the top, there's a navigation bar with various icons. Below it, the 'Summary by Status' table lists various statuses and their counts. The 'Selected Campaign Lines' table below it shows campaign details. A red arrow points to the 'Go' button in the 'Selected Campaign Lines' table, and another red arrow points to the 'Re-Sync Selected Orders to Naviga Plan' option in the dropdown menu.

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.

The screenshot shows the Sales Activity Report interface. At the top, there's a navigation bar. Below it, the 'SALES ACTIVITY REPORT' section contains filters for Product Group, Order Sales Rep, Starting On, Ending On, Campaign UDF Text 1, and Exclude Campaigns with Quote Status. The 'Exclude Campaigns with Quote Status' checkbox is checked. A purple arrow points to the 'Refresh Data' button. Below the filters, the 'Campaigns' table is displayed with various columns including Order Rep/Line Item, Product Group, Rep %, Advertiser Brand Name, Brand Billing State, Billing Country, Customer ID, PIB Code, PIB Description, Agency, Agency State, Agency Country, Agency Acct #, Product Description, Line Item Description, Section, Position, Ad Type, C/L Type, Date the order was booked, Start Date, and End Date.

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.

ID	Description	Stage Type	In Pipeline	Create Opportunity	
NEW	New	Open	☒	☐	☒
PROG	In Progress	Open	☒	☐	☒
CON	Connected	Open	☒	☐	☒
RETRY	Didn't Connect, Retry	Open	☒	☐	☒
MQL	Marketing Qualified	Qualified	☐	☒	☒
MDL	Marketing Disqualified	Disqualifie	☐	☐	☒
ID	Enter a Description	Open	☐	☐	☐

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

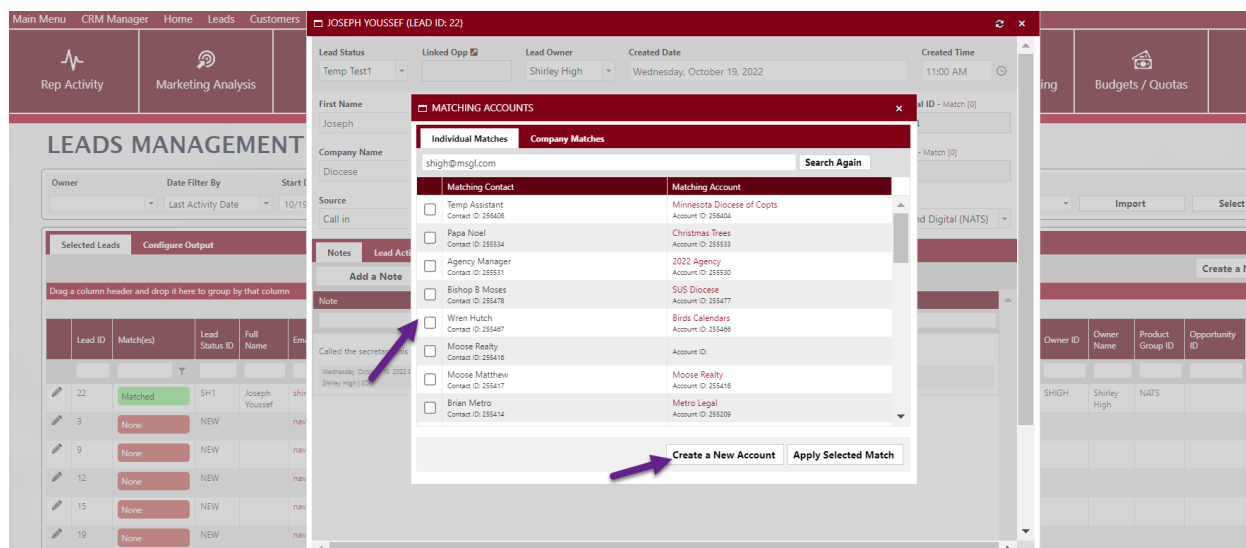
This screen can be used to assign leads to members of the marketing team.

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 or 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.

CREATE A NEW ACCOUNT

Company Match Type: Individual is Direct Buyer (Company)

Other Company Detail:

Accounting Information:

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.

LEADS MANAGEMENT

Owner: Shirley High (SHIGH) **Date Filter By:** Created Date **Date Range:** 10/1/2022 **Match Status:** All **Product Group:** Nature Pubs and Dig **Marketing Campaign:** **Marketing Effort:** **Lead Status:** **Source:** **Import** **Select Data**

Selected Leads **Configure Output** **Create a New Lead**

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

Lead ID	Lead Status ID	Lead Status Name	Match(es)	Full Name	Company ID	Company Name	Owner ID	Owner Name	Opportunity ID
34	MQL	Marketing Qualified	Matched	Kimberly Hock	256463	Kimberly Geological Research	SHIGH	Shirley High	1229
33	NEW	New	None	Moose Brock	256463	Moose Pet Supplies	SHIGH	Shirley High	
30	MDL	Marketing Disqualified	Matched	Dis Qualified	256463	Not A Chance	SHIGH	Shirley High	
29	MQL	Marketing Qualified	Matched	Boaz Smith	256455	Wheat Threshing	SHIGH	Shirley High	1228
22	MQL	Marketing Qualified	Matched	Joseph Youssef	256453	Diocese	SHIGH	Shirley High	1227
31	RETRY	Did Not Connect. Retry	Matched	George Seeba	256461	Seeba Contractors	SHIGH	Shirley High	

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.

Owner: shir **Date Filter By:** Last Activity Date **Start Date:** 10/19/2022 **End Date:** **Product Group:** Nature Pubs and Dig **Marketing Campaign:** **Marketing Effort:** **Lead Status:** All Items checked **Source:** **Import** **Select Data**

Selected Leads **Configure Output** **Create a New Lead**

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

IMPORT LEADS FROM A SPREADSHEET

Select Import File

leads_import.xlsx × Remove

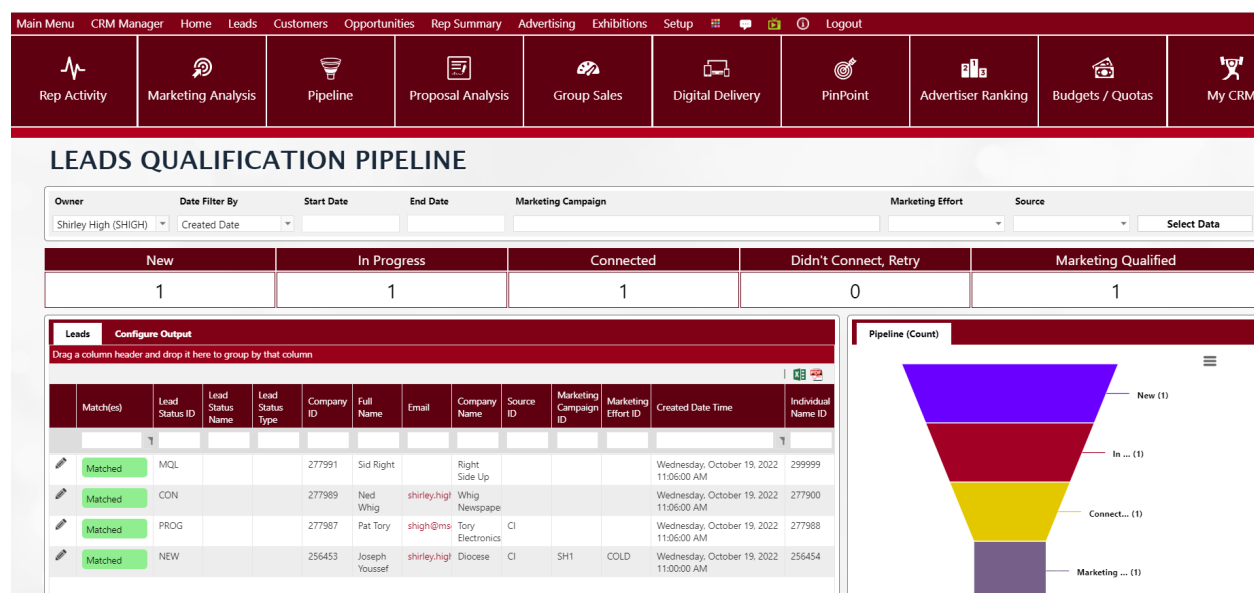
Download Empty Template Import Leads

Lead ID	Match(es)	Lead Status ID	Full Name	Email	Phone	Company ID	Individual Name ID	Owner ID	Owner Name	Product Group ID	Opportunity ID	Campaign ID	Lead Status Name	First Name	Last Name
27	Matched	MQL				Right Side Up		277991	299999	NATS				Sid	Right
26	Matched	CON	shirley.high@newscycle.com	7634544444	Whig Newspaper			277989	277900	NATS				Ned	Whig
25	Matched	PROG	Pat Tory	shigh@msgl.com	7634542222	Tory Electronics		277987	277988	NATS				Pat	Tory
22	Matched	NEW	Joseph Youssef	shirley.high@navigaglobal.com	7634544444	Diocese	CI	SH1	COLD					Joseph	Youssef

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.

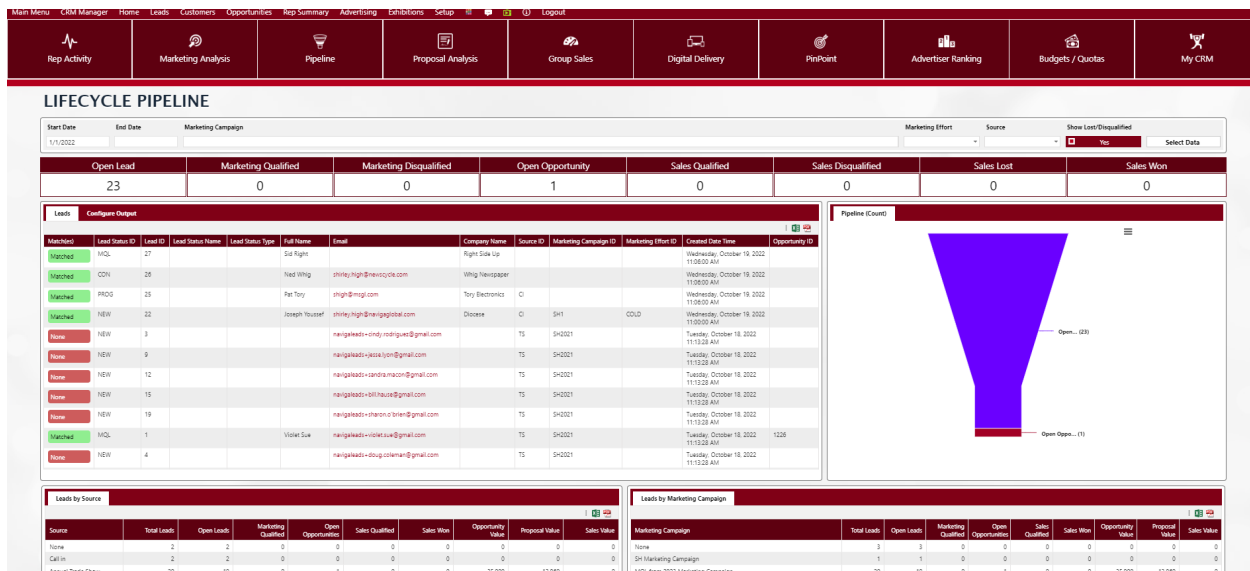
Leads Qualification Pipeline

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.

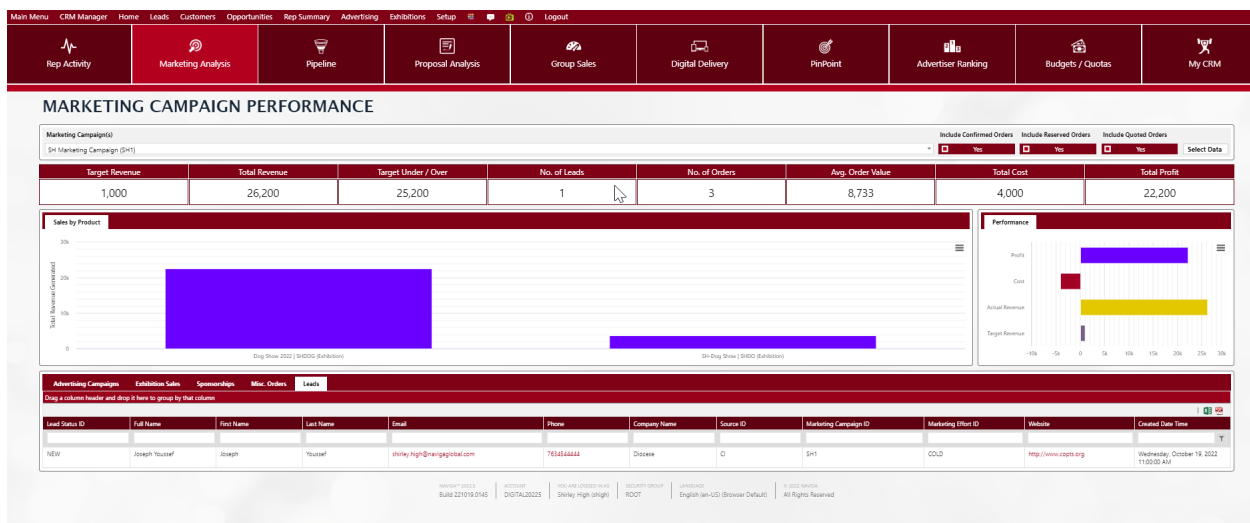


Navigate to the menu Leads -> Leads Lifecycle Pipeline and search by the criteria provided.

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 Sales 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.

The screenshot shows the CRM interface for managing leads. The main window displays the details for 'JOSEPH YOUSSEF (LEAD ID: 22)'. The 'Lead Status' dropdown menu is open, showing options: New, In Progress, Connected, Didn't Connect, Retry, **Marketing Qualified** (highlighted with a purple arrow), and Marketing Disqualified. The form fields include:

- Lead Status:** New
- Linked Opp:** [X]
- Lead Owner:** Shirley High
- Created Date:** Wednesday, October 19, 2022
- Created Time:** 11:00 AM
- Last Name:** Youssef
- Email:** shirley.high@navigaglobal.x
- Phone:** 7634544444
- Individual ID - Match [0]:** 256454
- Job Title:** Bishop
- Website:** http://www.copts.org
- Company ID - Match [0]:** 256453
- Source:** Call in
- Marketing Campaign:** SH Marketing Campaign (SH1)
- Marketing Effort:** Cold Calling
- Product Group:** Nature Pubs and Digital (NATS)

Below the form, there is a 'Notes' section with a table of lead activity:

Lead ID	Match(es)	Lead Status ID	Full Name
27	Matched	MQL	Sid Right
25	Matched	PROG	Pat Tory
26	Matched	CON	Ned Whig
22	Matched	NEW	Josep Yous

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.

Lead ID: JOSEPH YOUSSEF (LEAD ID: 22)

Lead Status: Marketing Quali

Linked Opp: [Link Icon]

First Name: Joseph

Last Name: Youssef

Company Name: Diocese

Job Title: Bishop

Source: Call in

Marked: SH M

Created Time: 11:00 AM

Individual ID - Match [0]: 256454

Company ID - Match [0]: 256453

Product Group: Nature Pubs and Digital (NATS)

NEW OPPORTUNITY

Short Description: MQL from SH1 Mktg Campaign

Opportunity Type: Ad Sales

Stage: Identified 5 %

Product Group: Nature Pubs and Digital

Forecast Amount: 5,000

End Date: Tuesday, January 17, 2023

Close Date: Friday, November 18, 2022

Owner: Shirley High

Cancel Create

Notes: Add a Note

Note: Called the secretary this morning and awaiting a call from Shirley High | EDIT

Full Name: Sid Right, Pat Tory, Ned Whig, Josep Yous

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

JOSEPH YOUSSEF (LEAD ID: 22)

Lead Status Marketing Quali	Linked Opp 1227	Lead Owner Shirley High	Created Date Wednesday, October 19, 2022	Created Time 11:00 AM
---------------------------------------	---------------------------	-----------------------------------	--	---------------------------------

First Name Joseph	Last Name Youssef	Email shirley.high@navigaglobal.com	Phone 7634544444	Individual ID - Match [0] 256454
-----------------------------	-----------------------------	---	----------------------------	--

Company Name Diocese	Job Title Bishop	Website http://www.copts.org	Company ID - Match [0] 256453
--------------------------------	----------------------------	--	---

Source Call in	Marketing Campaign SH Marketing Campaign (SH1)	Marketing Effort Cold Calling	Product Group Nature Pubs and Digital (NATS)
--------------------------	--	---	--

Notes | Lead Activity / History | Attachments

Add a Note

Note

Called the secretary this morning and awaiting a call from the boss.

Wednesday, October 19, 2022 9:18:00 AM
Shirley High | [EDIT](#)

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.

Account Name
Road Marking Equipment of Sweden AB

Parent Account
Account Quick Search

Account Type
Advertiser / Exhibitor

Primary Industry

Secondary Industry

Website
https://www.rme.se/

International Tax ID

Registered Company No
827810932

In ELMA
☒ Yes

Annual Revenue
0.0

Employees
0

Tier

Tier

Addresses Social Media Links Sources Aliases

New Address

Address	City	State/Region	Zip/Postal	Phone	Fax	Edit
---------	------	--------------	------------	-------	-----	------

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.

ts Jobs Purchase Orders Bank Reconciliation Analysis Setup Logout

A/P INVOICE SEARCH

Search Criteria

Invoice No.

Invoice Start Date

Invoice End Date

Vendor ID

Vendor Name

Invoice Amount From

Invoice Amount To

Reference

P.O. Number

Clear Form **Search**

Results

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.

A/P INVOICE SEARCH

Search Criteria

Invoice No.

Invoice Start Date

Invoice End Date

Vendor ID

Vendor Name

Invoice Amount From

Invoice Amount To

Reference

P.O. Number

387

Clear Form

Search

Invoice ID	Vendor ID	Vendor Name	Invoice Date	Invoice Amount	Period	Currency	Reference	P.O. Number
RCSH-146-1.1	387	SH-Electric	2/15/2016	3,000.00	2015-12			
RCSH-146-1.2	387	SH-Electric	2/15/2016	3,000.00	2015-12			
RCSH-146-1.3	387	SH-Electric	2/15/2016	3,000.00	2015-12			
ZZ123	387	SH-Electric	5/20/2016	222.00	2016-05			
20207301	387	SH-Electric	7/30/2020	300.00	2020-07		M7302020	
20201	387	SH-Electric	9/10/2020	1,000.00	2020-09			
20202	387	SH-Electric	9/10/2020	1,000.00	2020-09			
20203	387	SH-Electric	9/10/2020	2,000.00	2020-09			
2020387	387	SH-Electric	9/14/2020	300.00	2020-09			

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.

Main Menu Customers Invoices Credit Control Payments Statements Reporting Setup Logout

AUTO-CLEAR CLIENT BALANCES

Client Group(s)

Company

Aging Method

Client Selection

Credit Controller

Only select Balances that are

Greater Than or Equal to

Less Than or Equal to

Include COA on Payment Calc

Include Credits on Payment Calc

Get Clients

ANNAS (ANNAS)

Advertising clients (ADVERT)

Agency Group (AGY)

FRANK'S TEST (FXS)

JACK'S TEST (JACK)

MULTIPLE PRODUCT ADV (MULT)

Ray's clients (RAY)

Shirley's client group (SH)

Shirley's second group (SHG2)

TEST CLIENTS (TEST)

new (new)

Credit Stop Date

Age of Oldest Invoice (in Days)

0-30

31-60

61-90

91-120

121+

Cash on Account

Credits

Balance Including Credits and COA

Amount to Pay

Payment Amount

659

19,576.25

37,853.60

0.00

0.00

-2,387.00

-161.29

-2,387.00

54,881.56

54,881.56

1,856

0.00

0.00

303,524.00

0.00

188,128.27

-13,988.76

0.00

477,663.51

477,663.51

3,215

0.00

24,797.39

5,169.66

0.00

756,297.39

-52,819.48

-41,525.31

733,444.96

733,444.96

5,730

19,576.25

62,650.99

308,693.66

0.00

942,038.66

-66,969.53

-43,912.31

1,265,990.03

1,265,990.03

Process Payments

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.

Main Menu Customers Invoices Credit Control Payments Statements Reporting Setup Logout

GENERATE A/R AGING REPORT

Shirley's first rep

A/R Aging Report

- A/R Aging Report
 - Run A/R Aging Report**
 - View Reports
- A/R Aging Setup
 - Default A/R Aging Parameters
 - Sort Codes

A/R Aging Report Parameters

Age by Date or Period: Age by Date

Aging Method: Age from the Invoice Date

Date to Use: Use the Check Date

Aging as of Date: 7/15/2017

Days past Date: 0

Min. Invoice Balance: 0.00

Ignore Transactions Before This Date:

Report Detail: Detail

Show Invoice Payments: ☒ Yes

Suppress Zero Lines: ☒ Yes

Sort Option: Billto name/Adv

Companies: Digital Inc (01)

Currency: Select Currency or leave blank for ALL

Module(s): Select Module(s) or blank for ALL

Customer Selection Criteria

Client(s):

Min. Account Balance: 0.00

Max. Account Balance: 0.00

Client Type:

Credit Controller: Select a Controller or blank for ALL

Client Group: Shirley's client group (SH), Shirley's second group (SHG2)

Collection Agencies: Do NOT include Collection Agencies

Zip Code Ranges: From Zip To Zip Remove

-- No Records --

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.

Credit Control
Payments
Statements
Reporting
Setup
B
Logout

Other Information

Flagged for Refund
No

COA Reason
pp

Invoice Details - Local Currency
Foreign Currency

Invoice ID	Invoice Date	Invoice Amount	Paid Amount	Discount	Write-Off
-- No Records --					

G/L Details - Local Currency
Foreign Currency

G/L Account ID	Description	Debit Amount	Credit Amount
01*00*0000*00*0110	CASH - BANK OF AMERICA	100.00	0.00
01*00*0000*00*0148	ACCOUNTS RECEIVABLE	0.00	100.00

Pre-Paid Orders

Module	Order ID	Amount
Advertising Campaign	11060	100.00

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.