

Release Guide

In this section we will publish the changes for each new version of Naviga Ad beginning with the 2023.1 version. Where applicable, we also include testing notes along with the feature information

This document provides step by step instructions of how to use the new features in the 2023.1 release grouped by module. March 4, 2023 will be the release date for this version.

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



These are the most important takeaways that you *need* to pay attention to:

- There is a change in Google Ad Manager Integration on how and when ads send to GAM ([read more](#))
- There was a significant change to the structure of [Taxes](#) in the system which will affect Ad, Exhibitions, A/R and A/P modules.
- There are significant changes to Opportunities that you will want to visit, do some setup, and train your reps about because their screen will look different once you upgrade ([read more](#))
- There is a change to the [Prepayment screen](#) in order entry, so it will look different to users
- There is a new "[My Profile](#)" icon on the menu, so that will look different when the users log in.

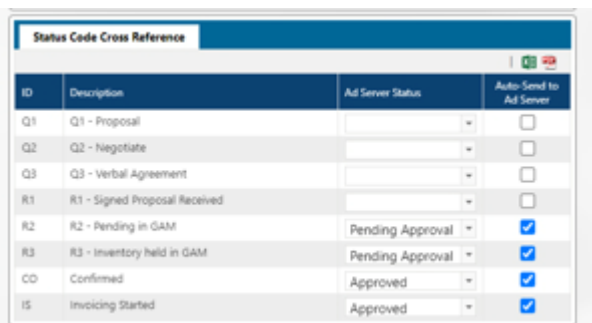
Advertising Module

Google Ad Manager (GAM) Changes

Workflow Settings / Status Code Settings

Navigate to Setup → Ad Server Integration Setup → Settings node.

In versions Prior to 2023.1, the bottom section was called Status Code Cross Reference and looked like this:



ID	Description	Ad Server Status	Auto-Send to Ad Server
Q1	Q1 - Proposal		☐
Q2	Q2 - Negotiate		☐
Q3	Q3 - Verbal Agreement		☐
R1	R1 - Signed Proposal Received		☐
R2	R2 - Pending in GAM	Pending Approval	☒
R3	R3 - Inventory held in GAM	Pending Approval	☒
CO	Confirmed	Approved	☒
IS	Invoicing Started	Approved	☒

In this section, Admins would determine if a given Campaign Status should Sync to GAM and what the GAM status should be for any given Naviga Ad Campaign Status.

Beginning in 2023.1, to better reflect to how GAM works, this section has been moved to the Connection Settings node and Re-labeled "Workflow Settings" and looks like this:

Workflow Settings	
1	CAMPAIGN STATUS TO TRIGGER ORDER CREATION IN GAM Reserved 1-Contract Signed This is the minimum Campaign Status that will trigger Order (and Line Items) creation in GAM. Orders are created in a DRAFT status in GAM.
2	CAMPAIGN STATUS TO TRIGGER SUBMIT FOR APPROVAL IN GAM Reserved 3 - most likely This is the minimum Campaign Status that will trigger a SUBMIT FOR APPROVAL request to GAM.
3	SKIP INVENTORY CHECK WHEN SUBMITTING REQUEST FOR APPROVAL ☒ Yes
4	CAMPAIGN STATUS TO TRIGGER APPROVAL IN GAM Confirmed-Ready to Bill This is the minimum Campaign Status that will trigger a request for APPROVAL to GAM.
5	SKIP INVENTORY CHECK WHEN SUBMITTING APPROVAL ☒ Yes
6	REQUEST LINE DELETION IN GAM WHEN LINE IS DELETED ☒ Yes

Here is a brief description of what each item does:

1. **CAMPAIGN STATUS TO TRIGGER ORDER CREATION IN GAM:** This is the minimum Campaign Status that will trigger Order (and Line Items) creation in GAM. Orders are created in a **DRAFT** status in GAM. So in the above example, when a campaign is in R1 status, it will send to GAM as a draft.
2. **CAMPAIGN STATUS TO TRIGGER SUBMIT FOR APPROVAL IN GAM:** This is the minimum Campaign Status that will trigger a **SUBMIT FOR APPROVAL** request to GAM. In the above example, if the Campaign is put in the R3 status, it will get submitted for approval in GAM. ***Note*** When something is submitted for approval in GAM, it needs to be approved or disapproved in GAM before the API will allow us to make any additional updates to that order, so be sure to test this in your test environment and understand how it works and if it will work for you to set something here. If you do not wish to approve orders in GAM, consider setting #2 and #4 to the same status...that will essentially set it to ignore #2 and only use #4.
3. **SKIP INVENTORY CHECK WHEN SUBMITTING REQUEST FOR APPROVAL:** If set to yes, the system will not check again for Inventory when the Campaign Status is updated to the Status set in #2 above.
4. **CAMPAIGN STATUS TO TRIGGER APPROVAL IN GAM:** This is the minimum Campaign Status that will trigger a request for APPROVAL to GAM.
5. **SKIP INVENTORY CHECK WHEN SUBMITTING APPROVAL:** If set to yes, the system will not check again for Inventory when the Campaign Status is updated

to the Status set in #4 above.

6. **REQUEST LINE DELETION IN GAM WHEN LINE IS DELETED:** This will send the request to GAM to delete a line if the line is deleted in Naviga Ad.

⚠ There is a conversion that will run at the time of upgrade that will take the settings from the first profile (if you have multiple) and convert it to the new format. Please check these settings and ensure it is how you want them before booking live orders.

Tax Rate Change

One of our customers experienced a change to their tax rate that required a tax rate with 4 decimal places, and we only previously supported 3 decimal places. To hopefully not have to make another change in the future, we went ahead and created support now for up to 5 decimals. This change necessitated a data conversion which will run at the time of upgrade to convert all tax rates to 5 decimal places.

System Parameters Changes

Default Font Size

Classified WYSIWYG Options

FONT SIZE RESTRICTIONS

1

ALLOW ONLY CUSTOM FONTS

☐ No

By default the classified WYSIWYG editor offers a small set of standard fonts. Custom fonts (which must be installed on your cloud instance by Naviga IT) are then added to this list of available fonts. If set to YES, the default fonts will be removed and only custom fonts allowed.

2

FONT SIZES AVAILABLE

5pt
5.5pt
6pt
6.5pt
7pt
7.5pt
8pt
8.5pt
9pt

RESTRICT TO ONLY THESE FONT SIZES

3

DEFAULT FONT SIZE

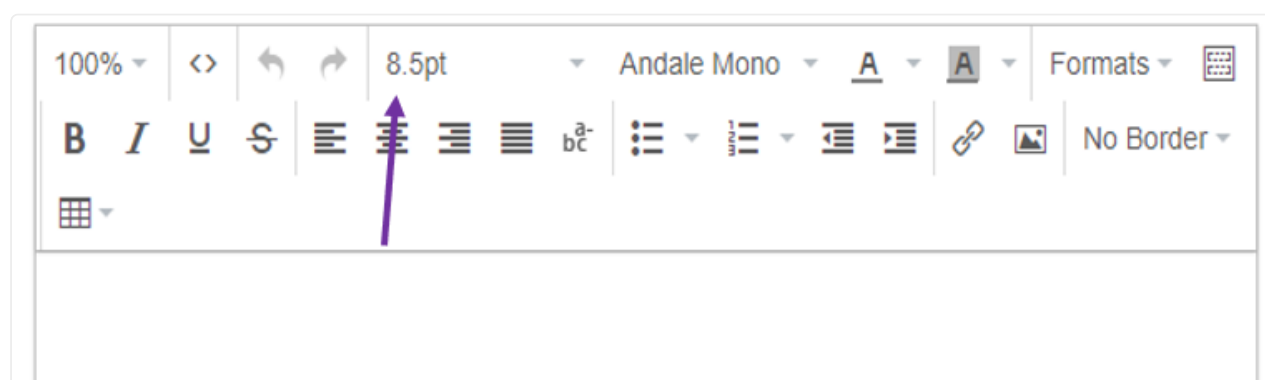
8.5pt

New Option available in the Classified WYSIWYG Options to set a default font size.

In earlier version the default font size was hard coded to 10pt, so that will be the default upon upgrading. If you would like to set it to something other than 10, you can set it in Setup > Advertising Setup > System Parameters.

Testing Notes for Default Font Size:

1. Navigate to the Advertising Module > Setup > Advertising Setup > System Parameters
2. In the Classified WYSIWYG Options section select desired Default Font Size (*pictured above*)
3. Create a new campaign via Campaigns > Enter a new Campaign
4. Create a new order for a classified liner ad type via desired method (*Full Line Entry or Booking Wizard*)
5. Note that the default font size in the WYSIWYG editor is now the selected option from System Parameters.



Inventory Settings

There is a new setting in Inventory Setting on Setup → Advertising Setup → System Parameters. In earlier versions, Print Inventory was only held on Confirmed orders. Now you have the option to also hold it on Reserved orders.

Inventory Settings

INVENTORY SETTINGS

1

QUOTED % COUNTED AGAINST AVAILABLE IMPRESSIONS

0255075100

2

RESERVED % COUNTED AGAINST AVAILABLE IMPRESSIONS

0255075100

3

NEWSLETTER INVENTORY STATUS

Reserved and Confirmed Orders Hold Inventory

4

PRINT INVENTORY STATUS

Reserved and Confirmed Orders Hold Inventory

Note of caution on the above - before changing this, do a check if there are any current orders in Reserved status that will have inventory conflicts if you make this change. You might want to resolve any conflicts prior to changing this field or the order won't be able to be saved if any edits are made.

Rate Card Maintenance

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Setup

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Logout

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My Security Settings

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User Security

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System Tables Setup

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Client Type Setup

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Client Type Defaults Setup

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Import / Export Ratecards

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Manage Expiring Ratecards

Product Ratecard Maintenance

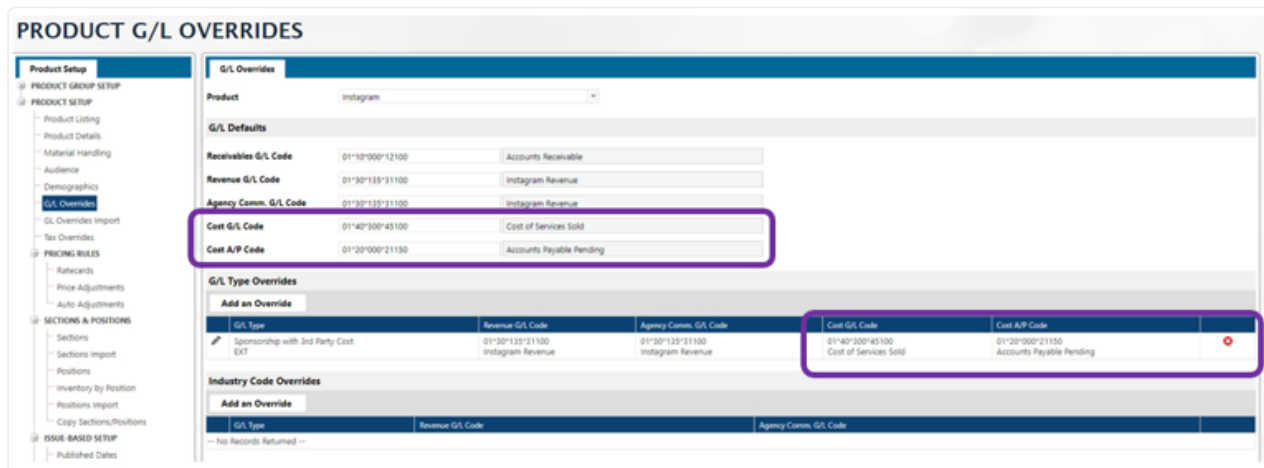
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Group Ratecard Maintenance

Rate Card Maintenance and Group Ratecard Maintenance has been added as a separate menu item under the setup menu. It does still exist under product setup like it has always been, but this allows for permissions to be more flexible. This allows a site to give permission to some users to create and maintain rates without also giving them access to the rest of Product Setup.

 This feature was first introduced in 2023.1, but was patched back to 2022.4, so you will see it in 2022.4 and later releases.

One more rate-related new feature is the ability to put a cost factor on the rate card and link it to a separate G/L. This was created primarily for non-O&O digital lines where you are re-selling inventory or services and there is a cost associated to you for that item. For example you might be selling something for \$15 CPM, but you must purchase that inventory on another site for \$8 CPM.



PRODUCT G/L OVERRIDES

Product Setup

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

G/L Overrides

Product: Instagram

G/L Defaults

Receivables G/L Code	01*10*000*12100	Accounts Receivable
Revenue G/L Code	01*30*135*11100	Instagram Revenue
Agency Comm. G/L Code	01*30*135*11100	Instagram Revenue
Cost G/L Code	01*40*100*43100	Cost of Services Sold
Cost A/P Code	01*20*000*21130	Accounts Payable Pending

G/L Type Overrides

Add an Override

G/L Type	Revenue G/L Code	Agency Comm. G/L Code	Cost G/L Code	Cost A/P Code
Sponsorship with 3rd Party Cost	01*30*135*11100	Instagram Revenue	01*40*100*43100	01*20*000*21130
EXT	Instagram Revenue	Instagram Revenue	Cost of Services Sold	Accounts Payable Pending

Industry Code Overrides

Add an Override

G/L Type	Revenue G/L Code	Agency Comm. G/L Code
-- No Records Returned --		

To set this up, there are some new fields on the Product G/L override and also on the ratecard itself.

On the G/L override for the product there is now a Cost G/L and a Cost A/P Code. This information is strictly for G/L purposes and is not currently displayed on any reporting in the Ad Module.

Once the cost G/L's are established, you will also add the cost factor to the Rate card associated with this product and G/L Types.

During line item entry, the above cost rate will be displayed as read-only on the campaign line. If the cost is different from the default, it can be overwritten on the line in the Cost Rate Override field:

Month	Days	Available	Billing Days	Billing Amount	Current Days	Ad Server Clicks	Ad Server Current as of	Actual Days	Actual Clicks
Feb 2023	28	0	28	700.00	0	0		28	0
Mar 2023	31	0	31	775.00	0	0		0	0
Apr 2023	30	0	30	750.00	0	0		0	0

If the Cost Rate Override is blank, the Cost Rate will be used in the G/L allocation.

On a performance campaign, this G/L allocation is done at the time of invoicing and can be seen on the invoice record in the G/L Details section:

G/L Details - Local Currency				Foreign Currency	
G/L Code	G/L Description	Debit Amount	Credit Amount		
01*10*000*12100	Accounts Receivable	700.65	0.00		
01*30*135*31100	Instagram Revenue	0.00	700.00		
01*40*300*45100	Cost of Services Sold	308.00	0.00		
01*20*000*21150	Accounts Payable Pending	0.00	308.00		
01*50*000*51150	Sales Tax	0.00	0.65		

On a flexible campaign, G/L estimates are created when the order is confirmed and can be seen on the Journal Entries node on the campaign:

JOURNAL ENTRY DETAIL

Journal Entry Detail			
Journal ID	I.1596.2	Total Debits	924.00
Type	GJ	Total Credits	924.00
Period	2023-02	Date Entered	1/27/2023
Reversal Period		Date Posted	
External ID		Entered By	KSMITH
Comment	ESTIMATE ENTRY - INTERNET CAMPAIGN 1596		

G/L Allocations			
G/L Account ID	G/L Account Description	Debit Amount	Credit Amount
01*20*000*24100	Deferred Revenue - Web	700.00	0.00
01*30*135*31100	Instagram Revenue	0.00	700.00
01*40*300*45100	Cost of Services Sold	224.00	0.00
01*20*000*21150	Accounts Payable Pending	0.00	224.00

✓ Multi-Select Products in Advertising Prepare Billing

When preparing a batch of invoices, the option to bill only specific products now has a multi-select on the Specific Products dropdown. In previous releases you could only select one product at a time if you wanted to prepare billing for specific products.

PREPARE PERFORMANCE CAMPAIGN BILLING

Campaign Billing

- Prepare Performance Billing
- Prepare Flexible Billing
- Generate Invoice(s)
- Print Invoice(s)
- Download Order Data File
- Regenerate Invoice(s)
- Reverse Campaign Invoicing
- Campaigns with Problems
- Billing Schedule Issues
- Credit Issues
- Missing Actuals
- Credit Card Issues
- Campaigns Awaiting Credits

Campaign Selection Criteria

Campaign Type: Performance
Billing Group:
Product Group:
OR: Specific Product(s):
Ad Type:
Specific Campaign IDs:
Selected Campaigns:

From Date:
Through Date:
Prepared Campaigns: Return All Campaigns
Pre-Payment: Return All Campaigns

Get Campaigns

Line Item	Line Type	Currency	Est. Amount	Actual Amount	Agency Comm.	Tax Amount	Net Amount	Pre-Paid	Auto Pay	P.O. Number	Delivery Method

Page: 1 of 1 Page size: 25 Change Item 0 of 0 of 0

Page: 1 of 1 Page size: 25 Change Item 0 of 0 of 0

Reset Save

✓ External ID & Statement ID Search

Click the menu Customers → Advertiser Agency Inquiry. Two new criteria were added to the Search window.

In the Advanced Search tab, enter an External ID number in the search field "External ID". OR Enter a Statement ID in the Statement ID Field

Click Search.

This advertiser displays and you can select the Advertiser Account to open the customer.

Customer Search **Go**

☐ Only Search My Database

Advanced Search | Search by Card Transaction | Search Results | History

Company/Name **Address**
☒ Words starting with ☐ Full name starting with **City**
Record Type **State**
Email **Zip**
Phone **Country Code**
Area Code **Module**
Client Type
Advertiser Client Type
Include Records Flagged as DO NOT USE
Invoice ID
Payment ID
Statement ID
Legacy ID
External ID
Clear Form **Search**

To find an External ID, navigate to the menu Customers → Advertiser Maintenance. Search on a customer and click the node "External system IDs".

ID	Description	External ID
4343	20231 test	20221212
20221212	Adding new one	
20226	Import	
IP	iPublish	
1112	Test for Import	

Note the External ID column tied to the External System ID. The latter's source is the menu Setup → System Tables Setup → External System Ids.

Rep % > 100%

In Brand Setup...

There has always been a Group Security setting on whether or not a user can set rep % > 100% when setting up the rep info on a campaign. This same group security setting is now being used to determine if the user setting up the rep defaults on the brand is also allowed to do that.

In Order Entry

Also, there was an issue that when the brand was set to assign to order entry, the Group security setting was not being honored and >100% was being allowed. That has been fixed.

Product Setup

G/L Overrides Import

Back in 2022.2, we added a feature to allow for overriding the G/L by Industry Code (PIB Code). This feature is now also included in the Import Template for Importing G/L Overrides. The last 3 columns in the spreadsheet are for the Overrides by Industry Code. They must match the Industry Code ID and appropriate G/Ls already configured in the system.

A	B	C	D	E	F	G	H
Product ID	GL Type Code	Revenue GL Code	Agency Commission GL Code	Industry Code	Industry Rev GL Code	Industry Agy Comm GL Code	
DEMO10				721	01*30*000*36100	01*30*000*36100	

When entering in Overrides by Industry Codes, columns B, C and D are not required, even though they are in bold. For normal GL Overrides by GL Type those are required.

 This feature was new in 2023.1, but also patched back to 2022.5.

Classified Categories

To make setup easier when sites have many, many classified categories, there is now a select-all option when linking Classified Categories to a product.

Navigate in Advertising Module to Setup > Product Setup > Issue-Based Setup > Classified Categories. In the category assignment area, select the dropdown. Select one or more categories, or use "check all" option at the top to select all items. Click the plus sign to add them to the product. Click Save at the bottom of the screen.

Product Setup

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

Classified Categories

Category Assignment

Product ID: The Navigator Website

Category Tree ID	Category Tree Name	Layout	
AUTO	Automotive	CLS Online Layouts	✖
EMPL	Employment	CLS Online Layouts	✖
LEGAL	Legal Ads	CLS Online Layouts	✖
MERCH	Merchandise	CLS Online Layouts	✖
OBITS	Obituaries/Funerals	CLS Online Layouts	✖
REAL	Real Estate	CLS Online Layouts	✖
SVCSDIR	Services Directory	CLS Online Layouts	✖

☐ Check All
☐ Best of the Best-FNP
☐ Employment
☐ Legal Ads
☐ Merchandise
☒ Obituaries/Funerals
☐ Real Estate
☐ Services Directory

Auto-Clear Client Balance indicator on Campaign Header

On the campaign header there is a new green thumbtack indicator to advise the user if this campaign will be paid with credit card in the A/R process "Auto-Clear Client Balances"

Auto Payment Method	Select Auto Payment Method
	Manage Cards on File
Default Contract	
Payment Terms (Default)	Net 60 
Status	Q1 - Proposal



If the above icon is green, there is a credit card on file and the card is selected in the Auto-Clear Balance drop-down in A/R Setup on the Advertiser Maintenance screen. The card will be processed typically prior to sending statements at month end but could be processed at a different time according to your business rules.

If the above icon is red, then a prepayment is required on the campaign before the campaign can be confirmed.

ACCOUNT: A/R SETUP

Account Maintenance

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

A/R Setup

Account ID 100170

Account Name Chupa Chups

A/R Details

Main Address ID 100163

Address
Chupa Chups
POLIGONO SECTOR SERRA
C / LES MASIES 16,
SAN ESTEVE SESROVIERES
BARCELONA
08635
SPAIN

Account Type Company

Client Group(s)

On Credit Stop ☐ No ☒ In Good Standing

Account Approval Status Approved by Kelly Smith on Thursday, May 28, 2020 8:42 AM

Approve Account

Credit Stop Date

Account Opened 5/28/2020

Last Updated 11/15/2022

Allow generation of collection letters ☐ No

Auto-Clear Balance XXXX5454

Select a card on file to use to when clearing this account's invoice balance. The auto-clear balances feature will include accounts with a card on file selected in this field. The auto-clear process creates a single card transaction for all outstanding invoice balances.

Material Management - copy status

When working with Materials across different products, often the Material Status matches across those products. The system is designed so that they **can** be different, if necessary, but often times, especially among similar products, the workflows are the same.

If the Material status IS THE EXACT SAME across products, we will change the material status for all products below when one is selected. This was done to accommodate scenarios where the same material is used across dozens of products and it was cumbersome to select the material status so many times.

MATERIAL MANAGEMENT FOR PRINT DISPLAY AND ISSUE-BASED PRODUCTS

Advertiser ID100170Advertiser NameChupa ChupsStart DateSunday, January 1, 2023End DateFriday, February 3, 2023Get Data

Insertions

Selected Size1/2 Page (85)Consolidate Issue DatesNoShow Lines With Material IDYesAttach Existing MaterialCreate New Material

Campaign ID	Line ID	Product ID	Product Name	Issue Date	Pick-up Material	Material	Material Status	Invoice ID
1559	4940	NAV13	The Navigator Times	Friday, January 6, 2023	897	Chupa Chups for the villages (1052) Edit Material	New	Pickup with Change
1584	5028	NAV10	The Navigator Daily News	Friday, January 6, 2023		Chupa Chups for the villages (1052) Edit Material	New	1 Description
1584	5029	NAV10	The Navigator Daily News	Friday, January 6, 2023	1052	Chupa Chups Red (1211) Edit Material	New	2 New Material to Come
1559	4940	NAV13	The Navigator Times	Friday, January 13, 2023		Chupa Chups for the villages (1052) Edit Material	New	3 Pickup/Camera Ready Rec'd
1584	5028	NAV10	The Navigator Daily News	Friday, January 13, 2023		Chupa Chups for the villages (1052) Edit Material	New	4 Pickup with Change
1584	5029	NAV10	The Navigator Daily News	Friday, January 13, 2023		Chupa Chups Red (1211) Edit Material	New	5 Material Reminder Sent
1559	4940	NAV13	The Navigator Times	Friday, January 20, 2023		Chupa Chups for the villages (1052) Edit Material	New	6 Materials Received
1584	5028	NAV10	The Navigator Daily News	Friday, January 20, 2023		Chupa Chups for the villages (1052) Edit Material	New	7 Out to Proof
1584	5029	NAV10	The Navigator Daily News	Friday, January 20, 2023		Chupa Chups Red (1211) Edit Material	New	8 Complete
1559	4940	NAV13	The Navigator Times	Friday, January 20, 2023		Chupa Chups for the villages (1052) Edit Material	New	8 Material Rework Requested
1584	5028	NAV10	The Navigator Daily News	Friday, January 20, 2023		Chupa Chups for the villages (1052) Edit Material	New	Pickup with Change
1584	5029	NAV10	The Navigator Daily News	Friday, January 20, 2023		Chupa Chups Red (1211) Edit Material	New	Pickup with Change

This is true if managing the material on the Production → Material Management screen shown above or on the Campaign's Material Management node.

✓ Material Management - Send Approval Email to contacts

When on the material Add/Update screen there is a section for approval status and in that section is a button to send Approval email to Client. We now have added the contact people on an account into a box, like we have in sending an order confirmation. Instead of pre-selecting the confirmation contact from the account, though, we pre-select the production contact from the campaign. This can be de-selected and someone else chosen if desired. If the material is attached to multiple

campaigns, the user will be prompted to select a campaign ID to use for selecting the default production contact.

MATERIAL ADD/UPDATE

Artwork Production Time Entries

Date/Time
-- No Records Returned --

Artwork Production History

Artwork Status
-- No Records --

Approval

Approval Status

Comment for Client

Client Rating
☆☆☆☆☆

Approval History

Approval Status
-- No Records --

Material Handling

Preflight Status
None

Upload New File

GENERATE EMAIL / PDF

Document Template
Approval Notification for Internal Users

Parameters | **View / Edit Document**

Email To

Contact	Email
☒ Tim Macrone	uwwdemo+tim@gmail.com
☐ Ed Guckin VICE PRESIDENT	uwwdemo@gmail.com

☐ Send separate emails to each recipient

CC

Subject
Creative proof 11524 ready for your review

Attachments

Email Body (if sending a PDF attachment)

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

Send Approval Email to Client

Note

Additionally, if you start typing an internal system user in the cc field, it will show user names and emails that can be added.

New Material - InDesign Settings

Previously the InDesign Settings on a Material Record, the InDesign Extension settings defaulted to Points as the unit of measure. Several clients complained about that since then the InDesign document defaults to display in Points and they wanted it to be inches. In a future release we will create a option to make that customizable for you, but for the time being we have simply changed that default to Inches instead of points.

✓ Customer screen - Ad Production View

Small modification has been made to the Creatives view on the customer record. In Previous versions the last product and last issue date were visible only if you clicked on the Quick Info button. Now it is more prominently displayed:

Print Material [1/4 Page (BS)]	No. 2026	Print Material [1/4 Page (BS)]	No. 2027
1/4 Pg Lets Go Diving	Quick Info	Updated More Diving	Quick Info
LAST PRODUCT The Navigator Times	LAST DATE 2/24/2023	LAST PRODUCT The Navigator Times	LAST DATE 2/24/2023
Select this Material Record		Select this Material Record	
			

Prevent unapproved/credit stop accounts from use on Co-op

Previously, the Co-op advertisers on a campaign were not getting the same scrutiny as the original advertiser. Now, accounts that are on credit stop or who were not approved cannot be added as a Co-Op:

CO-OP PARTICIPANTS

Campaign Explorer

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

Co-op Participants

Campaign ID: 1612 Start Date: 2/13/2023
Advertiser: Law Offices of Dewey, Cheatem, & Howe End Date: 3/31/2023
Brand: Law Offices of Dewey, Cheatem, & Howe Net Amount: 13,923.00000
Agency: Status: Confirmed

Co-op Participants

Company ID	Company Name	Contact	Address	Split %
-- No Records Returned --				
Company ID	Company Name	Contact	Address	Split %
		Create a New Contact		

Cancel Save

✓ Warning on Price Change

There is a new option in Group Security to warn a user if changes made to a campaign line results in a price change. This will display in both Full line entry and the Booking Wizard

EDITING COST PER THOUSAND LINE: 5056

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

Product: The Navigator Website Section: Ratecard CPM Rate: 15.00000
Ad Type: Cost Per Thousand Position: Right Rail Adjustments: -1.50000
Contract: 2023 Contract G/L Type: Website Advertising Discount Rate: 13.50000
Ratecard: Open Rates Material Status: Estimated Impressions: 16,000
Ratecard Line ID: 2 Estimated Amount: 216
Description: Open CPM Rate Estimated Tax: 0.00
Estimated Total: 216.00

Line Details Tracking Services Engagement Tracking

Start: 3/1/2023 1:00 PM End: 5/31/2023

Month	Days	Available	Estimated Imps.	Estimated Amount
Mar 2023	31	536,283	5,391	72.78
Apr 2023	30	615,416	5,217	70.43
May 2023	31	615,096	5,392	72.79

WARNING

WARNING: The price on this line has changed.

- On read, the price on this line was: ~~202.50~~
- On read, the tax on this line was: ~~0.00~~
- Total price on read: ~~202.50~~
- The price difference is: ~~13.50~~

OK Cancel

The flag in Group Security will default to "No" upon upgrade so that the system will continue to behave as it always has, but if you would like to turn the feature on, select this option in Group Security → Campaign Line Item Security

If set to NO the ability to remove Auto Adjustments is determined based on the rule set on the Auto Adjustment in Product Setup.

13 **DISABLE DISCOUNT PERCENT ON QUICK LINE ENTRY**
☐ No
 This will disable the Discount Percent field at the top of the grid in Quick Line Entry. If a discount is defaulted into this field it will still be used, but the user will not be able to change it.

14 **LOCK RATECARD AND EXTENDED RATE TEXTBOXES IN QUICK LINE ENTRY**
☐ No
 This option will disable the Ratecard Rate and Extended Rate textboxes in Quick Line Entry - in all cases.

15 **PREVENT CHANGES TO PAST DATES & ISSUES ON LINE EDIT**
☐ No
 When this option is set to YES, users in this security group will not be allowed to change Start/End dates where either date is in the past, or delete issue lines with past dates. This applies only to Co

16 **PREVENT CHANGES TO MATERIAL RECORDS AND MATERIAL ASSIGNMENTS IN LINE ENTRY**
☐ No
 When this option is set to YES, the user will not be able to Add, Attach or Edit material records on a line item in Campaign entry.

17 **DISPLAY A WARNING BEFORE SAVING A LINE EDIT THAT RESULTS IN A PRICE CHANGE**
☒ Yes

Affidavit Changes

Page Numbers are now optional

Navigate to Billing → Affidavits → Affidavit Form Templates

There is a new option on the Affidavit template to allow you to include (or not) the page number on an affidavit.

AFFIDAVIT TEMPLATES

Document Explorer

- Templates
 - Create New
 - Sample Affidavit
 - Sample w/Scaling
 - Sample with Mail to Page
 - TEMP

Template Details

Template ID: 88
 Title / Name: Sample w/Scaling
 Description:

Created On: 8/14/2022
 Created by: Kelly Smith
 Last Updated On: 2/2/2023
 Last Updated By: Kelly Smith
 Active: ☒ Yes

Add Page Number To Footer: ☐ No

View Merge Fields Documentation

Campaign and Line ID's are now included in the Batch detail

Navigate to Billing → Affidavits → Affidavit Processing and click on the Print Batches node. Select a batch ID to get to the Batch Details screen. If you need to print an extra copy of an affidavit or take a look at a specific PDF, this makes it a whole lot easier to find.

AFFIDAVIT BATCH DETAILS

Batch Overview

Batch ID	64	Date Created	2/2/2023
		Time Created	9:05 AM
		Created By	Kelly Smith

Affidavits in this Batch

Affidavit ID	Campaign ID	Line ID	Customer	Product	Contact Name	Contact Address	View PDF
513	1397	4703	Law Offices of Dewey, Cheatem, & Howe	The Navigator Times	John Dewey	One Park Avenue New York, NY 10008	
514	1397	4703	Law Offices of Dewey, Cheatem, & Howe	The Navigator Times	John Dewey	One Park Avenue New York, NY 10008	
515	1397	4703	Law Offices of Dewey, Cheatem, & Howe	The Navigator Times	John Dewey	One Park Avenue New York, NY 10008	
516	1397	4316	Law Offices of Dewey, Cheatem, & Howe	The Navigator Times	John Dewey	One Park Avenue New York, NY 10008	

Orders that have split lines are now less cumbersome to run Affidavit processing

In Previous versions, if your ad lines were split, when running affidavit processing you had to follow a very specific procedure to ensure that you printed the affidavit on the last date the ad ran. The affidavit processing window has been updated to make that process easier and more intuitive to the user.

Prepayment on an Order has a new look

In Campaign entry when you add a new prepayment to an order, it will look a little different than before, so you will want to give your users a heads up.

BILLING SUMMARY

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
 - Teasheet Contacts
 - Generate Proposal / Confirmation
 - Attachments
 - Invoices & Payments**
 - Rep Commissions
 - History of Changes
- Go to CRM View
- Go to Advertiser View

Billing Summary

Campaign ID: 1614
Advertiser: Starbucks
Brand: Starbucks
Agency:
Status: Confirmed

Pre-Payments

Enter a New Payment

Payment Type:
-- No Payments Applied --

Invoices

Invoice ID:
-- No Records --

PROCESS PAYMENT

ATTENTION
This client has NOT authorized Pre-Payment via Credit Card.

Amount to Pay: 6,300.00
Bill-To Client: Starbucks
Payment Type: Credit/Debit Card
Bank: Edgill Bank
Card to Charge: 411111*****1111
Card Type: VISA
Description: Edgill Bank
Card Status: Active
Last Charged:
Card Number: 411111*****1111
CVV:
Expire Date: 12 / 2025
Card Holder Name: John Buckman
Billing Address 1: 12323 SW 55TH ST STE 1005
Billing Address 2:
Billing City: COOPER CITY
Billing State: FL
Billing Zip: 33330
Billing Country: United States
Telephone:
Email:
Process Payment Later Process Payment Now

✓ There was a request to offer the ability to prompt for a receipt during campaign credit card charging like there already was on taking a credit card payment in the A/R module. These changes have allowed us to now prompt for a receipt in this screen as well, so once you complete the charge, you will see this prompt:

PAYMENT RECEIPT

Payment Saved. Would you like to generate a PDF receipt?

Yes No

This new change has also allowed us the ability to apply a credit as a prepayment in order entry as well. (of course this is subject to permission in [Group Security](#) see #21 in Campaign Header Security **Allowed Payment Types**)

- i** Note - if you would like to allow partial pre-payments be sure to set the flag in Advertising System Parameters to allow partial pre-payments. Otherwise the amount box will assume full-payment (#14 in Setup → Advertising Setup → System Parameters)

When the client is set to "Charge Credit Card" in Name Maintenance, the user will also see this when making a payment:

PROCESS PAYMENT

ATTENTION
This client has authorized Pre-Payment via Credit Card.

Amount to Pay	23,145.00	Card Number	
Bill-To Client	Backyard Beans	CVV	
Payment Type	Credit/Debit Card	Expire Date	MM YYYY
Bank		Card Holder Name	
Card to Charge		Billing Address 1	
Card Type		Billing Address 2	
Description		Billing City	
Card Status		Billing State	
Last Charged		Billing Zip	
		Billing Country	
		Telephone	

If the flag is set to "no" the user will see this when taking a payment:

PROCESS PAYMENT

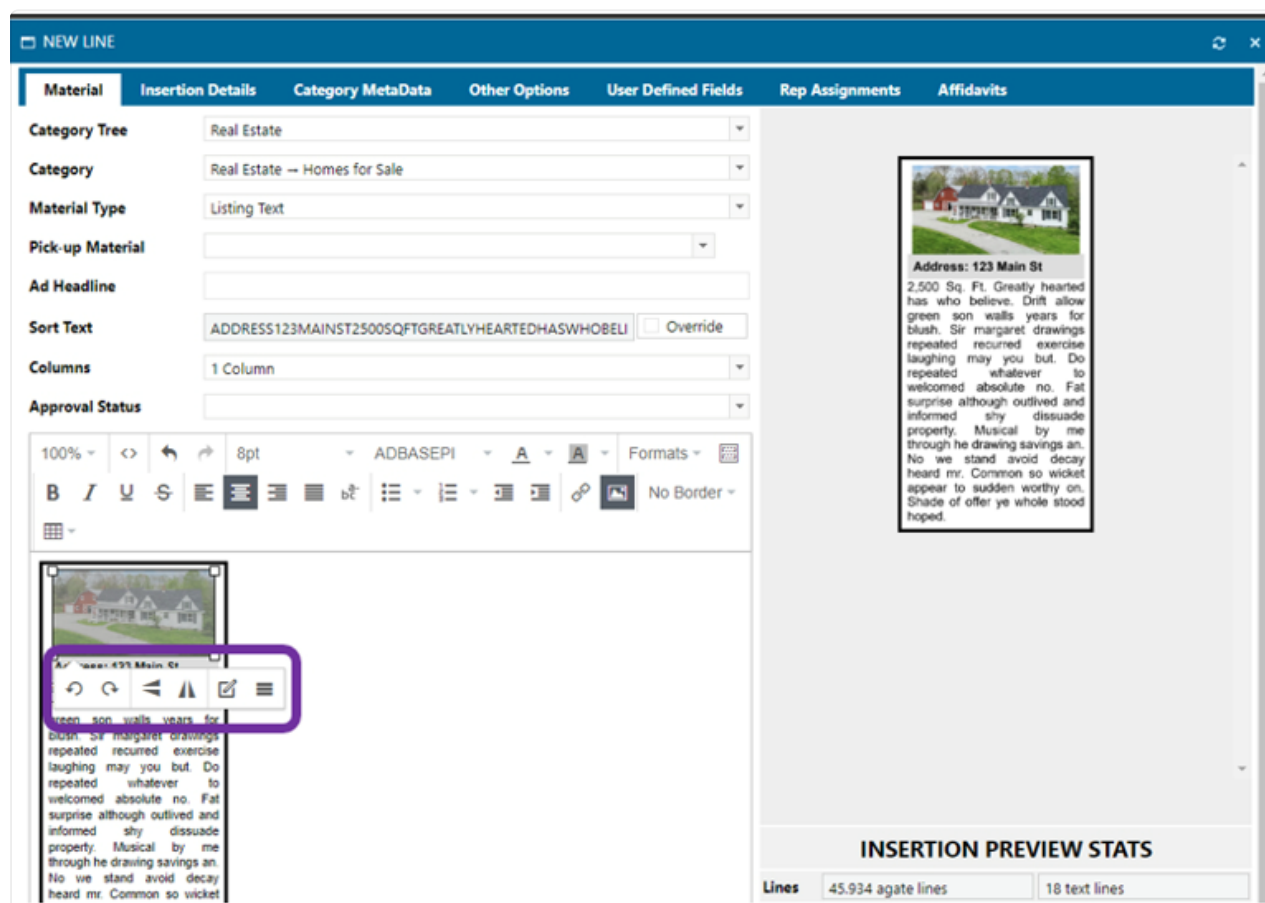
ATTENTION
This client has NOT authorized Pre-Payment via Credit Card.

Amount to Pay	2,940.00	Card Number	
Bill-To Client	Well Crafted Beer Co. Lansdale Bi	CVV	
Payment Type	Credit/Debit Card	Expire Date	MM YYYY
Bank		Card Holder Name	
Card to Charge		Billing Address 1	
Card Type			

The above message doesn't mean that you can't take a payment....it just means they don't have a preference set to always use a credit card.

Crop Images in Classified text editor

Images can now be edited in the Classified Text editor in both Full line entry and in the Booking Wizard.



Select the image and a new toolbar will be displayed. From left to right, these icons are:

- Rotate counter clockwise
- Rotate Clockwise
- Flip Vertically
- Flip Horisontally
- Edit (click here to enable the crop)
- Image options - click here to open this window:

Insert/edit image

GeneralAdvancedUpload

Source



Image description

Dimensions

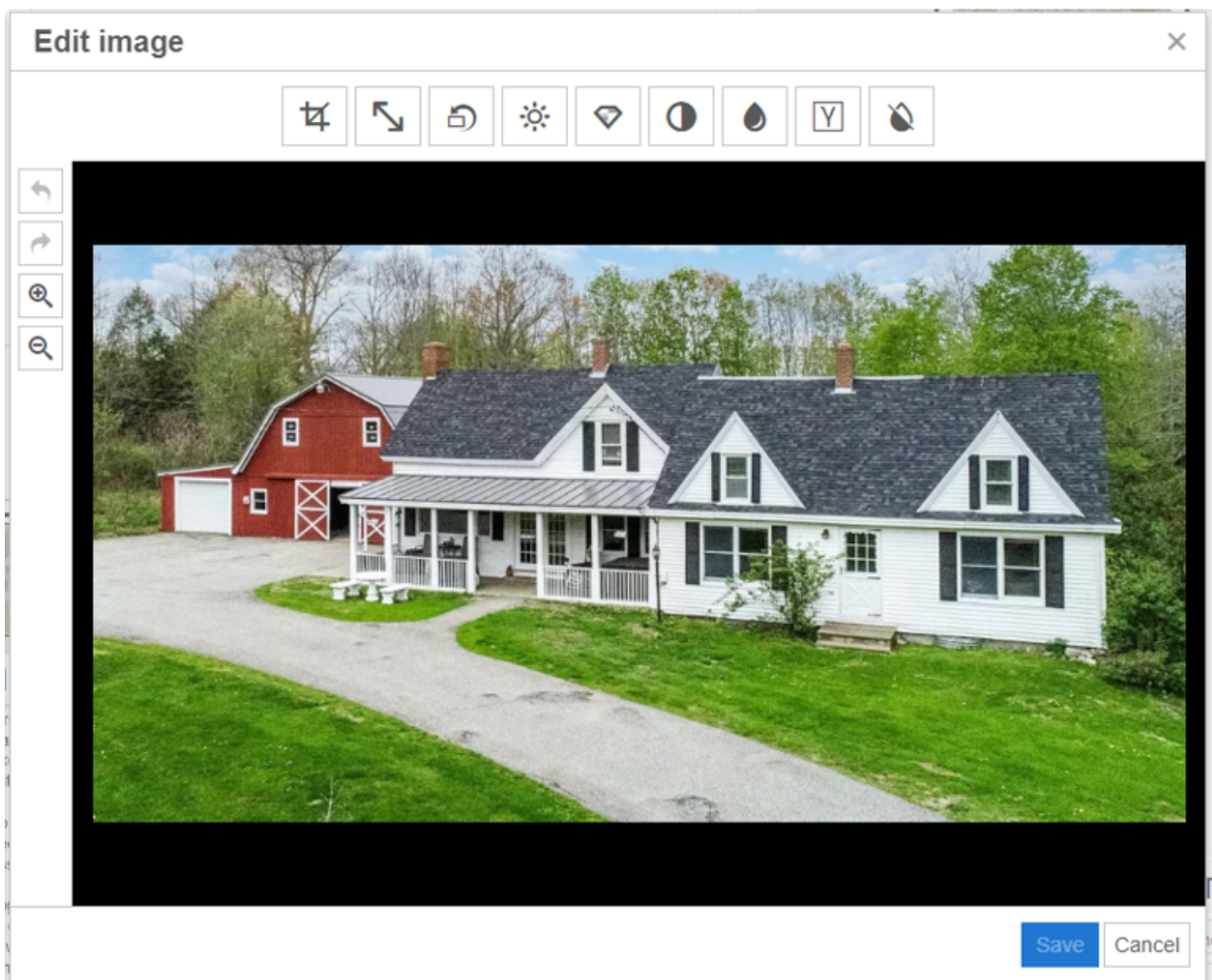
x

☒ Constrain proportions

Ok

Cancel

The edit option opens this window:



Crop Icon will enable drag and drop cropping from the 4 corners

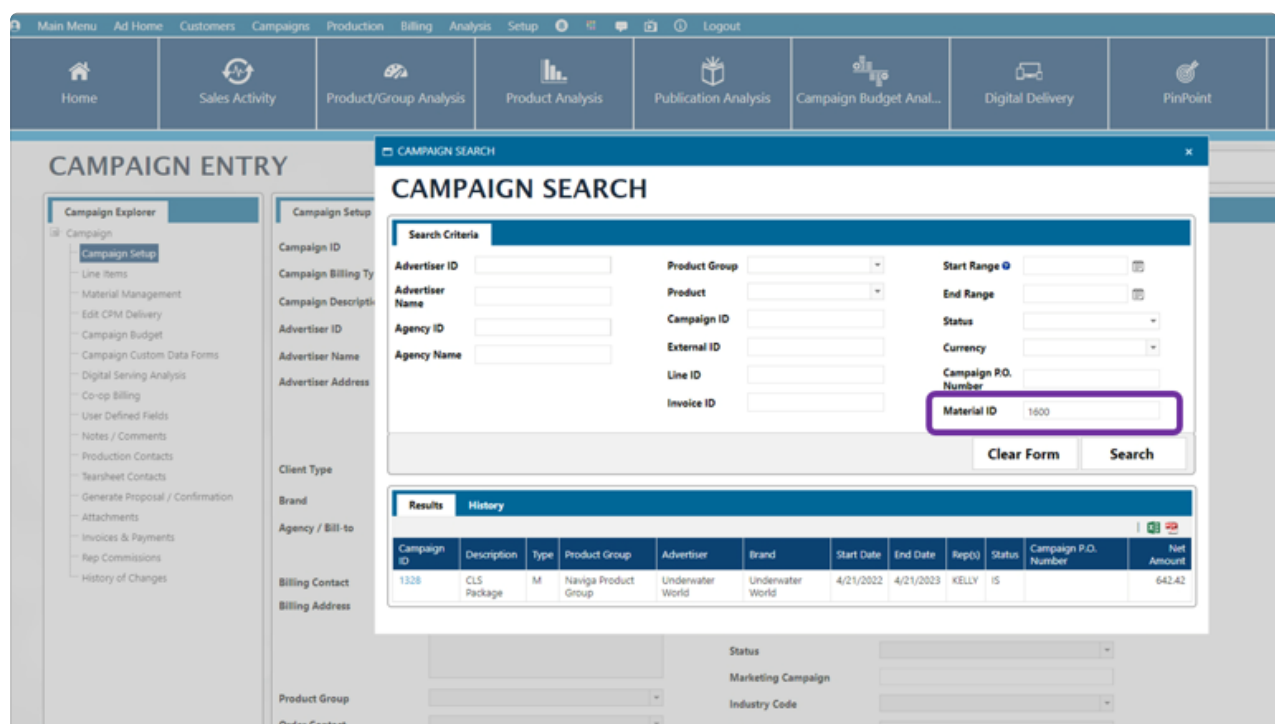
Additional photo tools in this window include:

-  Resize
-  Orientation
-  Brightness
-  Sharpen
-  Contrast
-  Color Levels
-  Gamma
-  Invert

Along the left of the edit window are undo, redo and zoom options.

Search on Material ID in Order Entry

Order Entry search window now has the ability to search on material ID.



CAMPAIGN SEARCH

Search Criteria

Advertiser ID Product Group Start Range End Range Status Currency Campaign P.O. Number Material ID

Clear Form Search

Results **History**

Campaign ID	Description	Type	Product Group	Advertiser	Brand	Start Date	End Date	Rep(s)	Status	Campaign P.O. Number	Net Amount
1328	CLS Package	M	Naviga Product Group	Underwater World	Underwater World	4/21/2022	4/21/2023	KELLY	IS		642.42

Deleting Campaign Lines with a filter

In Previous versions, if i wanted to delete all my "CPM" lines in this order for example...

	ID	Product	Description	Copy	Ad Type	Start Date	End Date	Jan 2022	Jul 2022	Aug 2022	...
☐	4369	Naviga Network Package ID: 25	Size: Skyscraper (120 x 600) Square Pop up (300 x 300) Square Button (125 x 125) Section: ALL Position: RDN		CPM	6/22/2022	6/22/2023	7.28	50.39	50.39	46.1
☐	4370	The Navigator Website Package ID: 25	Size: Square Pop up (300 x 300) Skyscraper (120 x 600) Square Button (125 x 125) Section: ALL Position: TOP		CPM	6/22/2022	6/21/2023	5.20	30.16	35.34	36.1
☐	4371	Navigator Magazine Package ID: 25	Size: 1/2 Page (6 Mag) (Mag: 17.875 x 4.875) Section: ALL Position: Both Color Full Color (CM) (C)		PMCO	6/1/2022	6/1/2022	0.00	6,800.00	0.00	6.1
☐	4372	Navigator Magazine Package ID: 25	Size: Full Page (Mag) Section: ALL Position: RDN Color Full Color (CM) (C)		PMCO	6/1/2022	6/1/2022	0.00	0.00	10,404.00	6.1
☐	4373	The Navigator Mobile App Package ID: 25	Size: Medium Rectangle (300 x 250) Section: NBWS Position: RDN		CPM	6/22/2022	7/21/2022	109.28	235.00	0.00	6.1
☐	4374	Navigator E-Newsletter Package ID: 25	Size: Leaderboard (728 x 90) Section: ALL Position: BT		CPD	7/06/2022	7/06/2022	0.00	1,700.00	0.00	6.1
								115.75	8,813.55	10,489.75	84.1

I could put CPM in the filter, and check the Check all checkbox:

☒	ID	Product	Description	Copy	Ad Type	Start Date	End Date
☒	4369	Naviga Network Package ID: 25	Size: Skyscraper (120 x 600) Square Pop up (300 x 300) Square Button (125 x 125) Section: ALL Position: RDN		CPM	6/22/2022	6/22/2023
☒	4370	The Navigator Website Package ID: 25	Size: Square Pop up (300 x 300) Skyscraper (120 x 600) Square Button (125 x 125) Section: ALL Position: TOP		CPM	6/22/2022	6/21/2023
☒	4373	The Navigator Mobile App Package ID: 25	Size: Medium Rectangle (300 x 250) Section: NBWS Position: RDN		CPM	6/22/2022	7/21/2022

but it would actually select all of the lines, even the ones that were hidden, so when i deleted the lines, all the lines would be deleted.

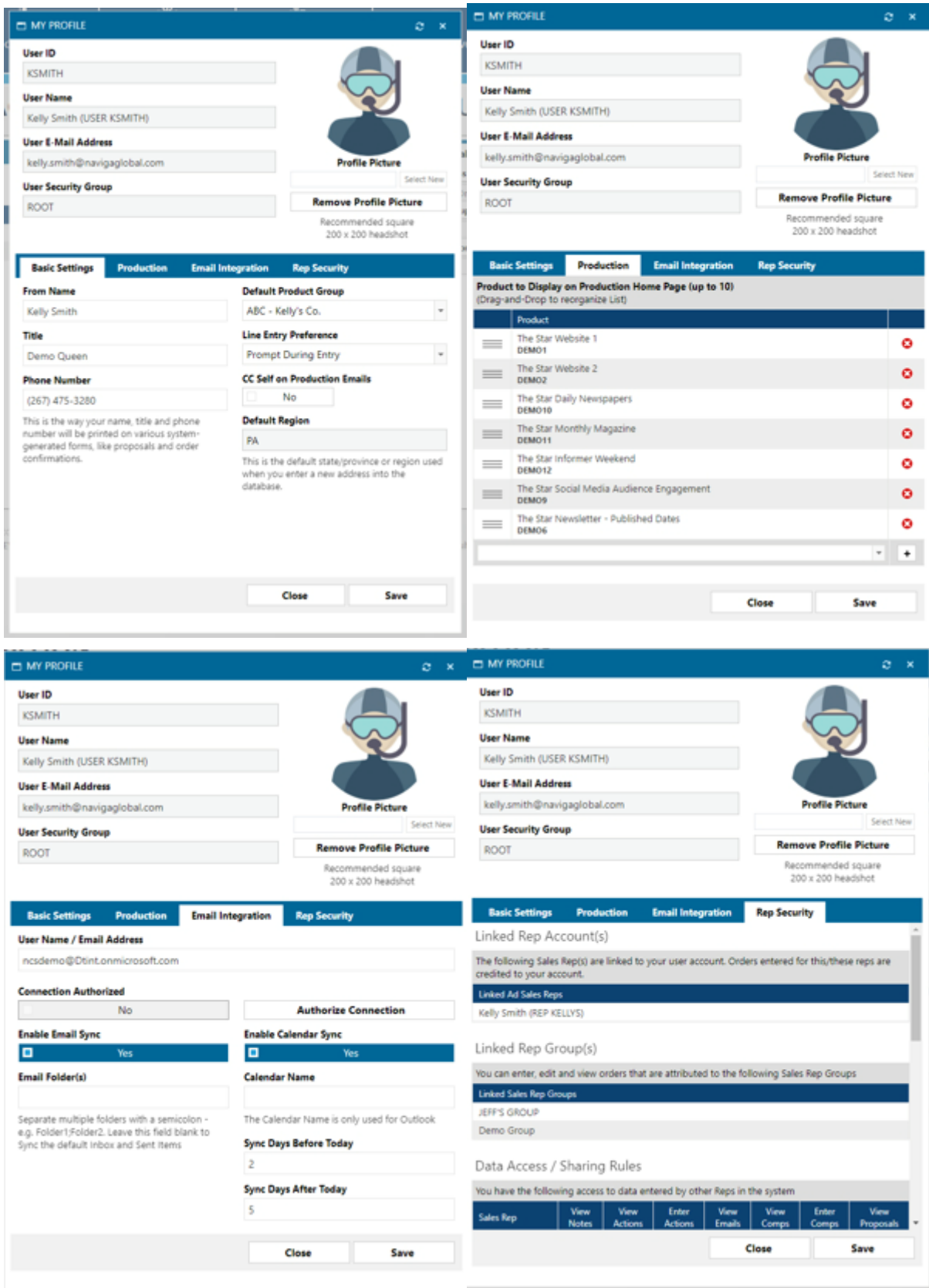
Now the filter has been modified to only select the visible lines when the select all is checked, so only the desired lines are deleted.

My Profile

In previous versions, users had limited access to the "User Security" screen to authenticate their email credentials for Syncing, so we have added a My Profile icon on the menu so that they can see and edit some settings. There was also a "My Security Settings" menu item under the Setup Tab, which many users didn't see at all since they didn't have access to the entire setup menu.



Clicking the person icon in the top left of the screen, in any module, will open a screen with some information and editing capability to some user settings:



They can update things like their "From Name" on forms, their preferred default product group in campaign entry, their profile picture, etc. This also allows them to authenticate their email if using the email integration through Nylas.

List of Packages Report

There is a new report available under the Setup Menu → List of Packages

Run the report with no search criteria to display all packages. Or use the Valid From and/or Valid Thru dates as filters to filter on those two fields. Further filters and sorting are available at the top of each column to further filter or sort the results.

LIST OF PACKAGES

Valid From

Valid Thru

Select Date

Start Date

End Date

Selected Packages

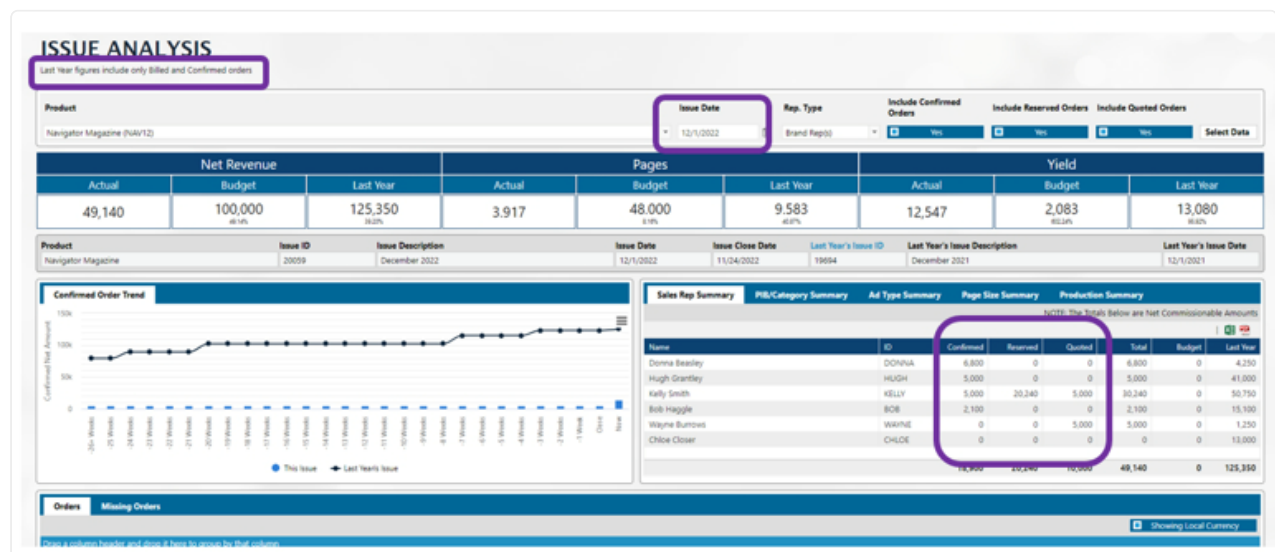
Configure Output

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

ID	Description	Valid From	Valid Thru	Currency ID	Client Types	Category Tree ID	Category ID	Do NOT Allow Line Deletion	Do NOT Allow Price Changes	Prompt for Product Selection	Minimum Product Selection	Prompt for Package Multiplier
			T	T				☐	☐	☐	☐	☐
22	Cross Newsletters Package (options)		Wednesday, December 31, 2025					☐	☐	☒	2	☐
25	Gold Package (Mago)		Wednesday, December 31, 2025					☐	☐	☐		☐
18	Group Buy	Thursday, April 1, 2021	Wednesday, December 31, 2025					☐	☐	☒	2	☐
24	Magazine Package	Friday, April 1, 2022	Wednesday, December 31, 2025					☐	☐	☐		☐
1	Navigator Gold Package		Wednesday, December 31, 2025					☐	☐	☐		☐
21	Weekly Roundup Full Newsletter Takeover		Wednesday, December 31, 2025					☐	☐	☐		☐
19	Digital Options		Wednesday, December 24, 2025					☐	☐	☒		☐
5	Digital Special		Wednesday, December 24, 2025					☐	☐	☐		☐
17	Group Buy Package		Monday, March 31, 2025					☐	☐	☐		☐
4	Online Special		Wednesday, November 30, 2022					☐	☐	☐		☐
7	Portal Special		Wednesday, November 30, 2022					☐	☐	☐		☐
20	Automotive Class Display	Wednesday, December 1, 2021	Friday, December 31, 2021			AUTO	CARS	☐	☐	☐		☐
2	Custom Package A		Friday, December 31, 2021					☐	☐	☐		☐

Issue Analysis Report

There have been a couple of changes to the Issue Analysis Report.

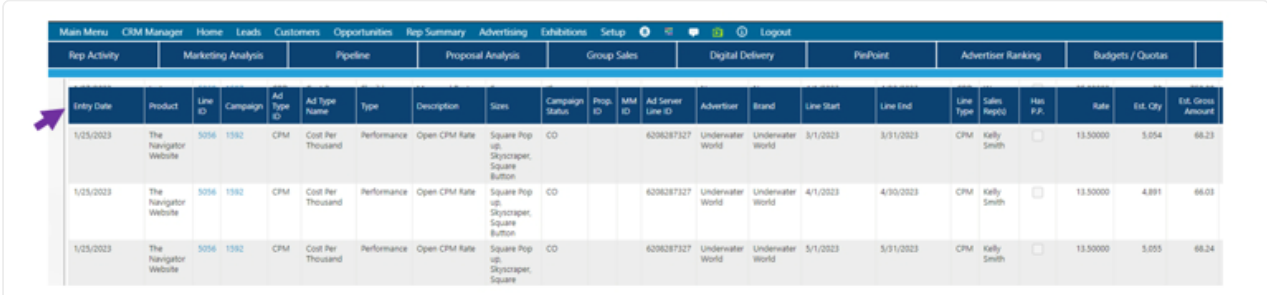


Previously, If the issue date was in the past, the Actual numbers did not include Reserved and Quoted orders, even if the option was selected to include them

Also, the last year numbers previously included only Invoiced numbers. Now last year will also include Confirmed as well.

Sticky Headers added to several reports

By "sticky headers" we mean that as you scroll down the page on a long report, the column headers will remain at the top of the page so that you know what you are looking at like so:



Main Menu CRM Manager Home Leads Customers Opportunities Rep Summary Advertising Exhibitions Setup Logout																							
Rep Activity			Marketing Analysis			Pipeline			Proposal Analysis			Group Sales			Digital Delivery			PinPoint			Advertiser Ranking		
Entry Date	Product	Line ID	Campaign	Ad Type ID	Ad Type Name	Type	Description	Sizes	Campaign Status	Prop. ID	Mkt ID	Ad Server	Law ID	Advertiser	Brand	Line Start	Line End	Line Type	Sales Rep/ID	Has P.A.	Rate	Est. Qty	Est. Gross Amount
1/25/2023	The Navigator Website	5056	1562	CPM	Cost Per Thousand	Performance	Open CPM Rate	Square Pop up, Skyscraper, Square Button	CO			6296287327		Underwater World	Underwater World	3/1/2023	3/31/2023	CPM	Kelly Smith	☐	13.50000	5,054	68.23
1/25/2023	The Navigator Website	5056	1562	CPM	Cost Per Thousand	Performance	Open CPM Rate	Square Pop up, Skyscraper, Square Button	CO			6296287327		Underwater World	Underwater World	4/1/2023	4/30/2023	CPM	Kelly Smith	☐	13.50000	4,891	66.03
1/25/2023	The Navigator Website	5056	1562	CPM	Cost Per Thousand	Performance	Open CPM Rate	Square Pop up, Skyscraper, Square	CO			6296287327		Underwater World	Underwater World	5/1/2023	5/31/2023	CPM	Kelly Smith	☐	13.50000	5,055	68.24

The following reports have had this added:

- Orders by Product**
- Orders by Entry Date***
- Production by Product Group
- Production by Product (non-print)
- Production Control by Controller
- Production by Print Product

It is also now "sticky" in the Campaign search window as well:

Campaign ID	Description	Type	Product Group	Advertiser	Brand	Start Date	End Date	Rep(s)	Status	Campaign P.O. Number	Net Amount
1616	New Ad	M	Naviga Product Group	Backyard Beans	Backyard Beans	3/1/2023	3/31/2023	KELLY	R1		4,350.95
1579	Medium Rectangle	M	Naviga Product Group	Backyard Beans	Backyard Beans	1/17/2023	1/15/2024	KELLY	Q1		26,675.00
1341	Magazine Ad	M	Naviga Product Group	Backyard Beans	Backyard Beans	11/1/2022	6/30/2023	KELLY	Q3		7,560.00
1449	Digital Campaign	M	Naviga Product Group	Backyard Beans	Backyard Beans	10/1/2022	2/28/2023	KELLY	Q1		585.00

** Speaking of Orders by Product report - another enhancement portal request was to add the Territory Name to the list of available fields. That was also done for 2023.1.

*** Speaking of Orders by Entry Date report - another enhancement portal request was to add the Ad Type to the list of available fields. That was also done for 2023.1.

Change to Campaign Imports

Navigate to Setup → Admin → [Campaign Import](#)

There are two imports within this screen. The changes below affect both imports

- The following fields were added to both templates:
 - Line Item PO Number
 - Space holder parent indicator
- Import functionality change on RATING
 - If ratecard and ratecard line ID is provided and rate is left blank, we will use ratecard rate.
 - If ratecard and ratecard line ID provided and rate is populated, we will use rate as overwrite rate.

- Option to auto create material as part of import even if product is generally set to not auto create material. If set to Yes then the import will create a material record for each order

Advertiser / Agency Import

Three new fields have been added to the Advertiser / Agency Import. Navigate to Setup → Admin → [Advertiser/Agency Import](#) and download the template.

BM	BH	BC	BT	BQ
Preferred Forms Language	Source	Legacy Parent ID	Is in the ELMA Registry	

- The CRM Name Source field - It is not a required field, but it does need to match a source that has been configured in Naviga Ad Setup
- Legacy Parent ID - This is required if the Advertiser being imported is to be a child account of this parent.
- Is in the ELMA Registry - This will set the flag on the client Name Maintenance record that they are in the ELMA Registry.

NOTE - ELMA – Electronic Recipient Address Register – is a Norwegian register recording the recipients of the various EHF formats. To put it simply, it is comparable with the telephone directory/Yellow Pages for phone number listings.

Salesforce Integration / Naviga Ad Menus

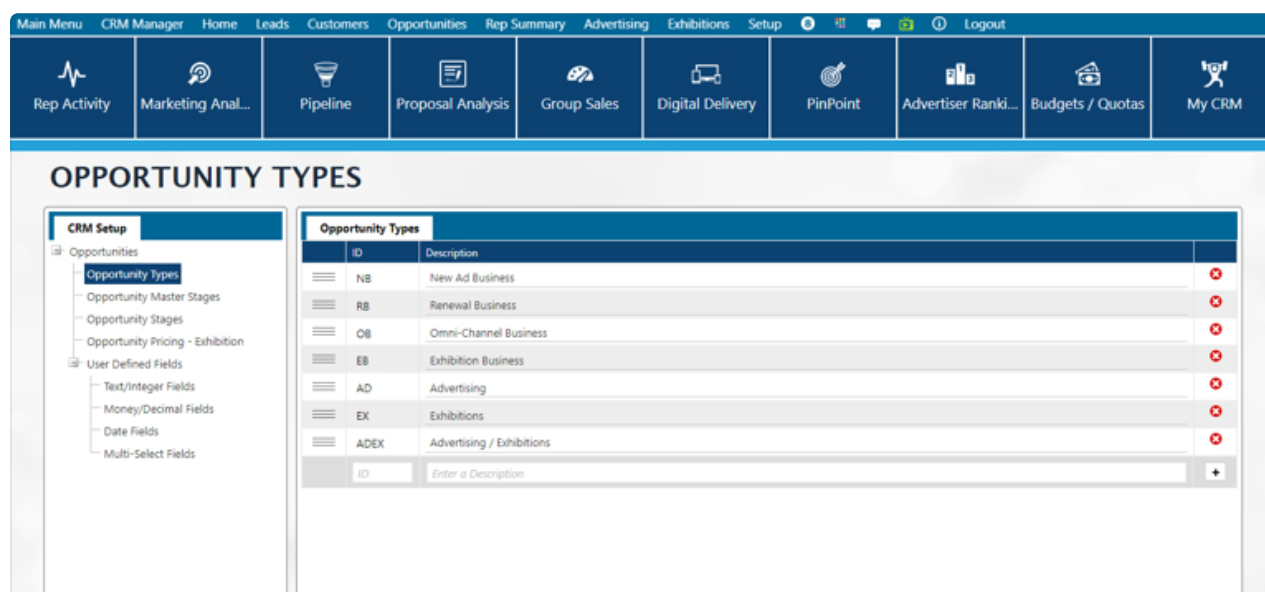
Under Integration Settings, Salesforce node, you will see a new option at the bottom of the Integration Settings

- **Security Group(s) that should NOT have access to standard Naviga Ad menu(s) when in another browser tab** - For most of our clients, sales people spend 100% of their time inside salesforce and do not enter the naviga application at all, except for those pages that are accessed via the Salesforce Canvas integration, and if they happen to end up in a naviga popup window linked from one of those screens, it wouldn't be desirable to have the navigation menus displayed. For other users, like admins or finance users, they might bounce back and forth between the full naviga application and salesforce and those users would like to see the navigation menus. This setting allows you to set which security groups should NOT have access to the main naviga navigation menus if they are logged into both Naviga and Salesforce simultaneously.

Opportunity Upgrades

In previous versions of Naviga Ad, the Opportunity types were hard coded as Advertising, Exhibitions, or a combination of Advertising and Exhibitions. This has been changed in 2023.1 and is now configurable. When upgrading to 2023.1 a conversion will automatically run and will create those three Opportunity Types and any existing opportunities will be assigned to those types based on what type they were assigned when the opportunity was created. Additional Opportunity Types can be added by typing in the ID and Description and clicking the plus to add it.

Click and drag the three lines  to the left of the opportunity type to reorder into your preferred sort. Save the changes.



ID	Description
NB	New Ad Business
RB	Renewal Business
OB	Omni-Channel Business
EB	Exhibition Business
AD	Advertising
EX	Exhibitions
ADEX	Advertising / Exhibitions

Opportunity Stages and Master Stages

Opportunities are defined by stages, according to the status of the negotiations with the client. For example, a stage can be in the beginning stage of cold calls and might be given a weight of 10%, then moved to a more advanced stage as talks progress to 25% and so forth. Each stage can be defined by a name which the user can choose in the opportunity screen. Each Opportunity Type can have its own unique stages. Sites already using CRM prior to 2023.1 will see their current opportunity stage setup for each Opportunity type converted over to this new structure with the upgrade.

To allow for reporting across all Opportunity Types, each Opportunity Type now will also be able to be linked to a Master Stage. If you choose to not set up master stages your system will still work as it did in previous releases, but you will only be

able to see the Pipeline report one opportunity type at a time. If you have several opportunity types, it may be cumbersome to understand the full picture of all Opportunities.

First, Create the Master Stages:

ID	Description	In Pipeline	Stage Type	Lead Qualification	Probability	
100	Qualification needed	☒	Open	Open	5	✖
150	Disqualified	☐	Open	Disqualified	10	✖
200	Qualified	☒	Open	Qualified	20	✖
250	Proposal(s) Sent	☒	Open	Qualified	40	✖
300	Contract Negotiation	☒	Open	Qualified	60	✖
350	Verbal Agreement	☒	Open	Qualified	80	✖
400	Closed Won	☐	Won	Qualified	100	✖
450	Close Lost	☐	Lost	Qualified	0	✖

1. Enter an ID and a Description for the Master Stage (ID does **not** have to be numeric as in the example)
2. Check the box if you wish for this stage to be included in the pipeline. You may wish to exclude some stages from the pipeline, for example lost or won stages are typically not considered to be in pipeline.
3. Select the Stage type (Open, Won or Lost)
4. Select the Lead Qualification for this stage (Open, Qualified or Disqualified, for those using Naviga leads functionality to track pre-opportunity sales progress)
5. Enter the probability of the deal closing
6. Click the plus sign to add to the list and repeat above steps until you have all necessary stages created
7. Drag and drop the 3 lines  to arrange the sort order for these master stages.
8. Save

Once you have created the Master Stages, then create the Opportunity Stages.

1. Select the appropriate Opportunity type at the top

2. Enter an ID and a Description for the Master Stage
3. Check the box if you wish for this stage to be included in the pipeline
4. Select the Stage type (Open, Won or Lost)
5. Select the Lead Qualification for this stage (Open, Qualified or Disqualified)
6. Select the appropriate Master Stage to display when viewing all opportunity types together in a report.
7. Enter the probability of the deal closing for this stage
8. Click the plus sign to add to the list and repeat above steps until you have all necessary stages created
9. Drag and drop the 3 lines  to the left of the stage to arrange the sort order for these master stages.
10. Save
11. Repeat these steps for each Opportunity Type that you have created.

CRM Manager Home Leads Customers Opportunities Rep Summary Advertising Exhibitions Setup Logout

Rep Activity Marketing Analysis Pipeline Proposal Analysis Group Sales Digital Delivery PinPoint Advertiser Ranking Budgets / Quotas My CRM

OPPORTUNITY STAGES

CRM Setup

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

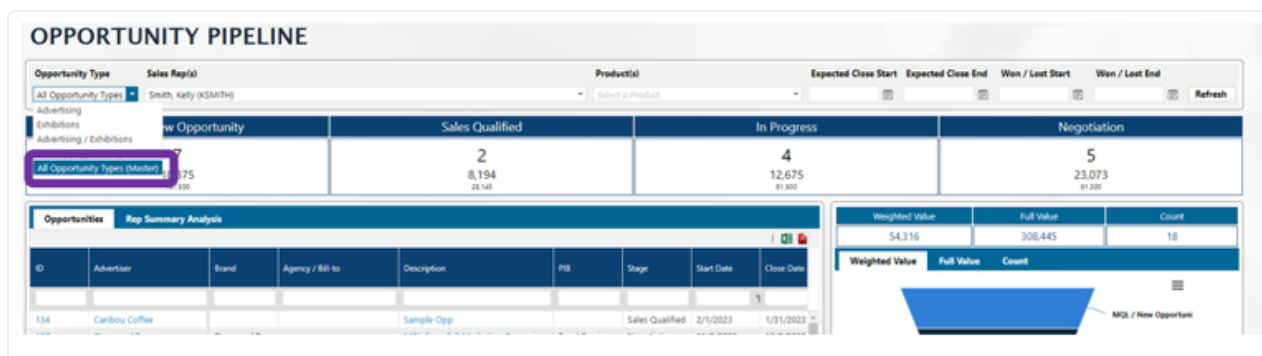
Opportunity Stages

Opportunity Type: Advertising (AD) [Get Data](#)

ID	Description	In Pipeline	Stage Type	Lead Qualification	Master Stage	Probability	
1	New Lead	☒	Open	Open	Qualification Needed	5	
2	Qualified Prospect	☒	Open	Qualified	Qualified	10	
3	Internal Review	☒	Open	Qualified	Qualified	30	
4	Proposal Sent	☒	Open	Qualified	Proposal(s) Sent	50	
5	Verbal Commit	☒	Open	Qualified	Verbal Agreement	70	
7	On Hold	☐	Open	Open	Qualification Needed	0	
8	Lost (Very sad)	☐	Lost	Open	Close Lost	0	
9	Finalizing Paperwork	☒	Open	Open	Contract Negotiation	90	
10	Deleted	☐	Lost	Disqualified	Close Lost	0	
6	Won	☒	Won	Open	Closed Won	100	
		☐	Open	Open	Master Stage		

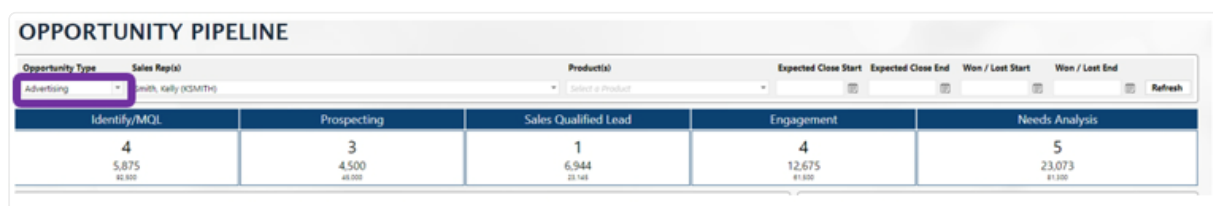
Testing Notes for Stages / Master Stages

You will only see the below option for "All Opportunity Types (Master)" if you have set up Master Stages and linked them to your stages for each Opportunity Type.

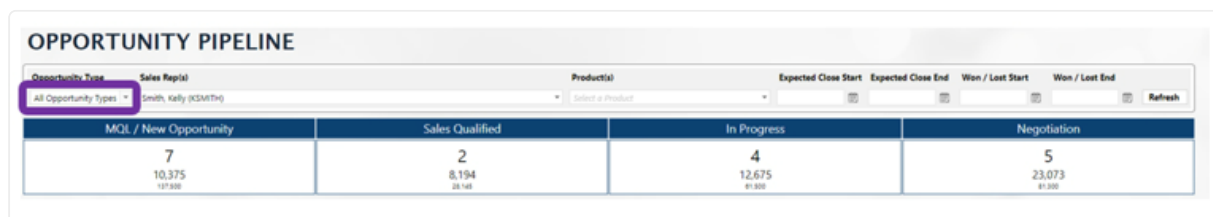


If you do **not** see the option for "All Opportunity Types (Master)" and would like to, follow these steps:

- Navigate to Opportunity Type Setup (CRM Module > Setup > Opportunity Configuration)
 - Note: default Opportunity Types after upgrading will be Ad, Exhibition, or Advertising / Exhibition.
 - These were previously the hard-coded opportunity type options. If you were previously only using one of the options, you will be able to delete the unused opportunity types. If there are opportunities using that type, you will receive an error message.
 - Add any additional opportunity types needed for your business.
- Navigate to Opportunity Master Stages and set up as many master Stages as you need
- Navigate to Opportunity Stages and ensure that there is a master stage for every opportunity stage for each opportunity type.
- Navigate to your Opportunity Pipeline Review report



- When viewing in the Master view, the stages displayed will be the master stages



Default Opportunity Type

Navigate to the Setup menu in the CRM module Setup → User Security → Access Control node. Click the drop- down menu Default Opp. Type and choose the type. The types displayed in the dropdown will be dependent on the types of opportunities setup previously.

The screenshot displays the 'USER SETUP: ACCESS CONTROL' interface. On the left is a navigation tree with 'Access Control' selected under the 'CRM' section. The main panel contains the following fields and settings:

- User ID:** KSMITH
- User Name:** Kelly Smith (USER KSMITH)
- User E-Mail Address:** kelly.smith@navigaglobal.com
- User Security Group:** Top of the Tree
- General Settings:**
 - Rep. Type:** Sales Manager
 - Default State/Region ID:** PA
 - Default Opp. Type:** Advertising (dropdown menu is open showing: Advertising, Exhibitions, Advertising / Exhibitions)
- Sales Order Entry Access:** New Ad Business, Renewal Business, Omni-Channel Business, Exhibition Business
- Allow Exhibition Sales:** (checkbox)
- Allow Advertising Sales:** (checkbox)
- Allow Subscription Sales:** (checkbox)
- Team Access:** (checkbox)
- Access to Other Reps:** Access Only as Defined in List Below

Create a CRM Opportunity

The Opportunity page has been updated with various new features to streamline and enhance the page:

- Different layout of the screen to allow for easy access to information.
- Section to choose the Values for Reporting by three options:
 1. Use the Forecast Amount across start /end date range
 2. Use the Product Grid
 3. Use the Selected Proposal/Quote
- Ability to create new brand.
- Split digital products lines by month, with similar split options as per the line items.

Valuation

Forecast Amount // [Calculate](#)
Currency

60,000
Use System i

Values for Reporting

Use the Forecast Amount across start/end date range
Use the Forecast Amount across start/end date range
Use the Product Grid
Use the Selected Proposal/Quote

Stage
Probability

Prospecting/New Lead
5 %

Tags

Valuation

The choice selected here will determine which value is used in the Sales Rep Activity page for the Opportunity line:

- Use the Forecast Amount across start /end date range: Use the amount in the Forecast Amount field.
- Use the Product Grid: Uses the sum all the lines in Product grid on the Opportunity

Products											Apply Sort	
Copy	Sort	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty	Price	Delete
1	g	NuV1	The Navigator Website	Open Rates (1)	Open CPM Rate	News Top Banner	4/1/2022 12/31/2022 Split By Month	CPM	10.00000	50,000	500.00	
1	g	NuV12	Navigator Magazine	Standard Rate Card (32)	1/2 Page (H) (Mag)	Section Right Hand Page	2/1/2023 Multi-Select	PMOD	8,000.00000	1	8,000.00	
1	g	NuV3	The Navigator Mobile App	Standard Mobile Rates (14)	Medium Rectangle - CPM	News Run of Section	4/1/2022 4/30/2022 Split By Month	CPM	9.00000	45,000	405.00	
1	g	NuV12	Navigator Magazine	Standard Rate Card (32)	Full Page (Mag)	Section Run of Book	2/1/2023 Multi-Select	PMOD	13,000.00000	1	13,000.00	
1	g	NuV5	Navigator E-Newsletter	Standard E-Newsletter Rate	Leaderboard	Section Top Banner	1/6/2023 Multi-Select	CPD	2,000.00000	1	2,000.00	

- Use the Selected Proposal/Quote: Choose checked line on Proposal grid on the Opportunity

Proposals & Campaigns									
Use for Reporting	ID	Brand	Agency	Description	Status	Proposal Date	Sales Rep	Net Amount	Remove
☒	1374	5th Street Towers			Q1 - Proposal	1/4/2023	KSMTH	23,905.00	
☐	1254	5th Street Towers		2022 Gold Package	DE	4/1/2022	KSMTH	25,905.00	

Link an Existing Proposal / Campaign: [Link](#) [Add New Proposal / Campaign](#) [Auto Generate New Proposal / Campaign](#)

Here is where you will see these numbers used:

Sales Rep	Status	2023-01 1/1/2023	2023-02 2/1/2023	2023-03 3/1/2023	2023-04 4/1/2023	2023-05 5/1/2023	2023-06 6/1/2023	2023-07 7/1/2023	2023-08 8/1/2023	2023-09 9/1/2023	2023-10 10/1/2023	2023-11 11/1/2023	2023-12 12/1/2023	Total
Kelly Smith	Confirmed	26,800	16,800	---	---	---	---	---	---	---	---	---	---	43,600
	Reserved	9,777	9,805	17,777	9,720	---	---	---	---	---	---	---	---	46,980
	Q3 - Verbal Agreement	1,890	---	1,890	---	1,890	---	---	---	---	---	---	---	5,670
	Q2 - Negotiate	---	---	---	---	---	---	---	---	---	---	---	---	---
	Q1 - Reserve	27,677	26,605	19,567	27,677	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	124,228
	Opportunities	---	---	21,000	---	---	---	---	---	---	---	---	---	21,000
	Confirmed + Reserved	36,577	36,405	17,777	9,720	---	---	---	---	---	---	---	---	90,480
	All Quoted	37,828	41,725	19,964	10,655	3,397	6,574	1,531	1,577	1,527	1,577	95	96	126,679
	Budget	288,500	299,400	308,400	411,400	371,400	361,400	371,400	361,400	371,400	361,400	361,400	371,400	4,238,900
	Budget vs Confirmed + Reserved	-261,700	-282,600	-308,400	-411,400	-371,400	-361,400	-371,400	-361,400	-371,400	-361,400	-361,400	-371,400	-4,195,300
	Budget vs Confirmed + Reserved + Quoted	-251,923	-272,995	-290,623	-401,680	-371,400	-361,400	-371,400	-361,400	-371,400	-361,400	-361,400	-371,400	-4,148,420
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-242,923	-263,360	-289,623	-391,025	-368,003	-354,826	-369,869	-359,823	-369,873	-359,823	-361,305	-371,302	-4,090,741

Dates entered on the opportunity may affect the financial period(s) where the Opportunity amounts are displayed in the Rep Activity report displayed above (also depending upon the Values for Reporting Selection made). Opportunities that were due to close in the past may not appear above, so keeping opportunities current with correct information will be important to this report being accurate.

Testing Notes for Valuation and 12 Month Performance Tab

The easiest way to test this is to select a rep and a period(s) without existing opportunities or make note of the current numbers and then see the difference when you put in a new test opportunity.

1. Create a new opportunity (CRM Module > Opportunities > Create a New Opportunity)
2. Enter Required information
 - ☒ Opportunity Type, Client, Brand and Agency in Basic Information
 - ☒ Forecast Amount, Owner and Stage in Valuation (Leave the Values for Reporting as the default "Use forecast amount" for now)
 - ☒ Start, End and Close Date in Dates (be sure to use dates in the future)
 - ☒ Short Description in Description of Opportunity
3. Save Opportunity
4. Navigate to the Rep Activity and note that the forecast amount will be equally divided among the months entered in the Start and End Date fields

Sales Rep	Status	2023-01 1/1/2023	2023-02 2/1/2023	2023-03 3/1/2023	2023-04 4/1/2023
 Kelly Smith	Confirmed	26,800	16,800	---	---
	Reserved	9,777	9,605	17,777	9,720
	Q3 - Verbal Agreement	1,890	---	1,890	---
	Q2 - Negotiate	---	---	---	---
	Q1 - Proposal	36,038	62,725	21,009	10,655
	Opportunities	---	12,500	12,500	---
	Confirmed + Reserved	36,577	26,405	17,777	9,720
	All Quoted	37,928	62,725	22,899	10,655
	Budget	288,500	299,400	308,400	411,400
	Budget vs Confirmed	-261,700	-282,600	-308,400	-411,400
	Budget vs Confirmed + Reserved	-251,923	-272,995	-290,623	-401,680
	Budget vs Confirmed + Reserved + Quoted	-213,995	-210,269	-267,723	-391,025
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-213,995	-197,769	-255,223	-391,025

- Return to the Opportunity and add some products in the product section
- Change the Values for reporting option to "Use Product Grid" (note the price and dates of the lines)

Products										
Copy	Stat	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty
		NW11	The Navigator Website	Open Rates (1)	Open CPM Rate	News Top Banner	2/1/2023 2/28/2023	CPM	10,000.00	30,000
		NW12	Navigator Magazine	Standard Rate Card (32)	1/2 Page (H) (Mag)	Section Right Hand Page	2/1/2023 2/28/2023	PMCO	8,000.00000	1
		NW13	The Navigator Mobile App	Standard Mobile Rates (14)	Medium Rectangle - CPM	News Run of Section	2/1/2023 2/28/2023	CPM	9,000.00	45,000
		NW12	Navigator Magazine	Standard Rate Card (32)	Full Page (Mag)	Section Run of Book	3/1/2023 3/31/2023	PMCO	13,000.00000	1
		NW15	Navigator E-newsletter	Standard E-newsletter Rate	Leaderboard	Section Top Banner	2/24/2023 2/24/2023	CPD	2,000.00000	1

- Save Opportunity
- Navigate to Rep Activity again and note the values have changed to now reflect the schedule within the grid

Sales Rep	Status	2023-01 1/1/2023	2023-02 2/1/2023	2023-03 3/1/2023	2023-04 4/1/2023
 Kelly Smith	Confirmed	26,800	16,800	---	---
	Reserved	9,777	9,605	17,777	9,720
	Q3 - Verbal Agreement	1,890	---	1,890	---
	Q2 - Negotiate	---	---	---	---
	Q1 - Proposal	36,038	62,725	21,009	10,655
	Opportunities	---	10,905	13,000	---
	Confirmed + Reserved	36,577	26,405	17,777	9,720
	All Quoted	37,928	62,725	22,899	10,655
	Budget	288,500	299,400	308,400	411,400
	Budget vs Confirmed	-261,700	-282,600	-308,400	-411,400
	Budget vs Confirmed + Reserved	-251,923	-272,995	-290,623	-401,680
	Budget vs Confirmed + Reserved + Quoted	-213,995	-210,269	-267,723	-391,025
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-213,995	-199,364	-254,723	-391,025

- Return to the Opportunity and create a proposal, either from the Product Grid using the "Auto Generate New Proposal / Campaign" option or manually with the "Add New Proposal / Campaign" option
- Mark your desired proposal as the one to use for reporting. This will auto-update your "Values for Reporting" option to "Use the Selected Proposal / Quote"

Proposals & Campaigns									
Use for reporting	1574	Brand	Agency	Description	Status	Proposal Date	Sales Rep	Net Amount	Remove
☒	1574	5th Street Towers		2022 Gold Package	Q1 - Proposal	1/4/2023	KSMITH	23,905.00	
☐	1575	5th Street Towers		2022 Gold Package	DE	4/1/2022	KSMITH	25,905.00	

11. Note the dates reflected in the Proposal

Line Details

Applied Incentives

Tickets

Booking Wizard

Quick Line Entry

Select a Product

Select an Ad Type

Full Line Entry

Prod. Schedule

Audience Planner

Audience Reach

Send a 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	Jan 2023	Feb 2023	Mar 2023	---	---	---	Total	Ratecard Price Variance %
☐	4992 Package ID: 1	The Navigator Website Size: Square Pop up (300 x 300), Superbanner (120 x 600), Square Button (120 x 120) Section: All Position: TOP	Open CPM Rate		CPM	3/1/2023	3/31/2023	0.00	0.00	500.00	---	---	---	500.00	-33.33%
☐	4993 Package ID: 1	Navigator Magazine Size: 1/2 Page (H) (Mag) (7.375 x 4.875) Section: All Position: End Color: Full Color-CHMY (AQ)	1/2 Page (H) (Mag)		PMCO	2/1/2023	2/1/2023	0.00	8,000.00	0.00	---	---	---	8,000.00	0.00%
☐	4994 Package ID: 1	The Navigator Mobile App Size: Medium Rectangle (300 x 250) Section: NEWS Position: RDS	Medium Rectangle - CP M		CPM	3/1/2023	3/31/2023	0.00	0.00	405.00	---	---	---	405.00	0.00%
☐	4995 Package ID: 1	Navigator Magazine Size: Full Page (Mag) (7.375 x 9.75) Section: All Position: RDS Color: Full Color-CHMY (AQ)	Full Page (Mag)		PMCO	2/1/2023	2/1/2023	0.00	13,000.00	0.00	---	---	---	13,000.00	0.00%
☐	4996	Navigator E-Newsletter Size: LeaderBoard (728 x 90) Section: All Position: TOP	LeaderBoard		CPD	3/14/2023	3/14/2023	0.00	0.00	2,000.00	---	---	---	2,000.00	0.00%
								0.00	21,000.00	2,905.00				23,905.00	

12. Navigate to the Rep Activity again and note that these numbers are now reflected in the Opportunities value

Sales Rep	Status	2023-01 1/1/2023	2023-02 2/1/2023	2023-03 3/1/2023	2023-04 4/1/2023	2023-05 5/1/2023
 Kelly Smith	Confirmed	26,800	16,800	---	---	---
	Reserved	9,777	9,605	17,777	9,720	---
	Q3 - Verbal Agreement	1,890	---	1,890	---	---
	Q2 - Negotiate	---	---	---	---	---
	Q1 - Proposal	36,038	41,725	18,104	10,655	---
	Opportunities	---	21,000	2,905	---	---
	Confirmed + Reserved	36,577	26,405	17,777	9,720	---
	All Quoted	37,928	41,725	19,994	10,655	---
	Budget	288,500	299,400	308,400	411,400	37
	Budget vs Confirmed	-261,700	-282,600	-308,400	-411,400	-37
	Budget vs Confirmed + Reserved	-251,923	-272,995	-290,623	-401,680	-37
	Budget vs Confirmed + Reserved + Quoted	-213,995	-231,269	-270,628	-391,025	-36
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-213,995	-210,269	-267,723	-391,025	-36

13. Confirm your order, which should update your opportunity to Closed Won depending on your settings. Navigate back to the Rep Activity Report and the Opportunity Value should now be removed from the Opportunities row because it has been added to the Confirmed row

Sales Rep	Status	2023-01 1/1/2023	2023-02 2/1/2023	2023-03 3/1/2023	2023-04 4/1/2023	2023-05 5/1/2023	2023-06 6/1/2023
 Kelly Smith	Confirmed	26,800	37,800	2,905	---	---	---
	Reserved	9,777	9,605	17,777	9,720	---	---
	Q3 - Verbal Agreement	1,890	---	1,890	---	1,890	---
	Q2 - Negotiate	---	---	---	---	---	---
	Q1 - Proposal	36,038	41,725	18,104	10,655	1,507	---
	Opportunities	---	---	---	---	---	---
	Confirmed + Reserved	36,577	47,405	20,682	9,720	---	---
	All Quoted	37,928	41,725	19,994	10,655	3,397	---
	Budget	288,500	299,400	308,400	411,400	371,400	---
	Budget vs Confirmed	-261,700	-261,600	-305,495	-411,400	-371,400	---
	Budget vs Confirmed + Reserved	-251,923	-251,995	-287,718	-401,680	-371,400	---
	Budget vs Confirmed + Reserved + Quoted	-213,995	-210,269	-267,723	-391,025	-368,003	---
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-213,995	-210,269	-267,723	-391,025	-368,003	---

- ❗ Troubleshooting: If you do not see values that you expect in here, check the Opportunity to ensure that the start / end and expected close dates are correct and that they are in current periods. If you expected to close something last year, and you didn't, it isn't automatically going to be displayed in this year's Rep Activity report. You will need to update the opportunity to current dates if it is still a viable opportunity.

Create New Brand

Navigate to the menu Opportunities → Create New Opportunity. Choose the advertiser who is set to use multiple brands from the list and enter the description fields as well as date ranges.

Then click "Create New Brand".

Enter the details of this brand in the pop-up window and save. This brand is now the one on this opportunity.

- ❗ Note - this is using the same permission as being allowed to create brands on a campaign. So if they user can create brands in order entry, they also can create them here. If they cannot create brands in order entry, they will not see the Create a new Brand link here either.

ADD A BRAND / DIV.

New Brand/Division ID: AUTO ASSIGN

Brand/Division Name:

Agency:

PIB/Industry Code: EDUCATION/PROFESSIONAL SVCS

Advertising Campaign Settings

Primary Campaign Rep: Cheryl Strayed

Product Group(s): Shirley's Nature Groups (Please do not d

Exhibition Settings

Primary Exhibition Rep: Cheryl Strayed

Exhibitor Type: STANDARD EXHIBITOR

Cancel Save

ENTER/UPDATE OPPORTUNITY

Basic Information

Opportunity ID // Copy: NEW

Opportunity Type: Ad Sales

Advertiser ID // Search: 255488

Advertiser Name: St. George Church

Brand // Create a New Brand

Agency ID // Search:

Agency Name:

Split Digital Lines as in Order Entry

Scroll to the Products grid.

Products

Apply Sort

Copy	Sort	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty	Price	Delete
0	WP	Astronomy Magazine	May 20-22 FDFP (138)	1 Page	Display All	12/1/2022 Multi-Select	NR	777.00000	1	777.00		
0	WP	Astronomy Magazine	May 20-22 FDFP (138)	1 Page	Display All	1/30/2023 Multi-Select	NR	777.00000	1	777.00		
0	BF	Blackfeet Proud Nation	SH2023 (46)	CPM	Cultural Impressions with it	12/1/2022 1/31/2023	CPM	20.00000	10,000	200.00		

SPLIT LINE BY MONTH

How would you like to allocate the Values

Copy the Value into each new line

Copy the Value into each new line

Split the value evenly across all new lines

Split the value proportional by days in the month

Close Continue

Enter a digital line across multiple months. Click the "Split by Month". In the pop-up window choose the option which you'd like to see in the order entry when you auto-generate the proposal.

The options are:

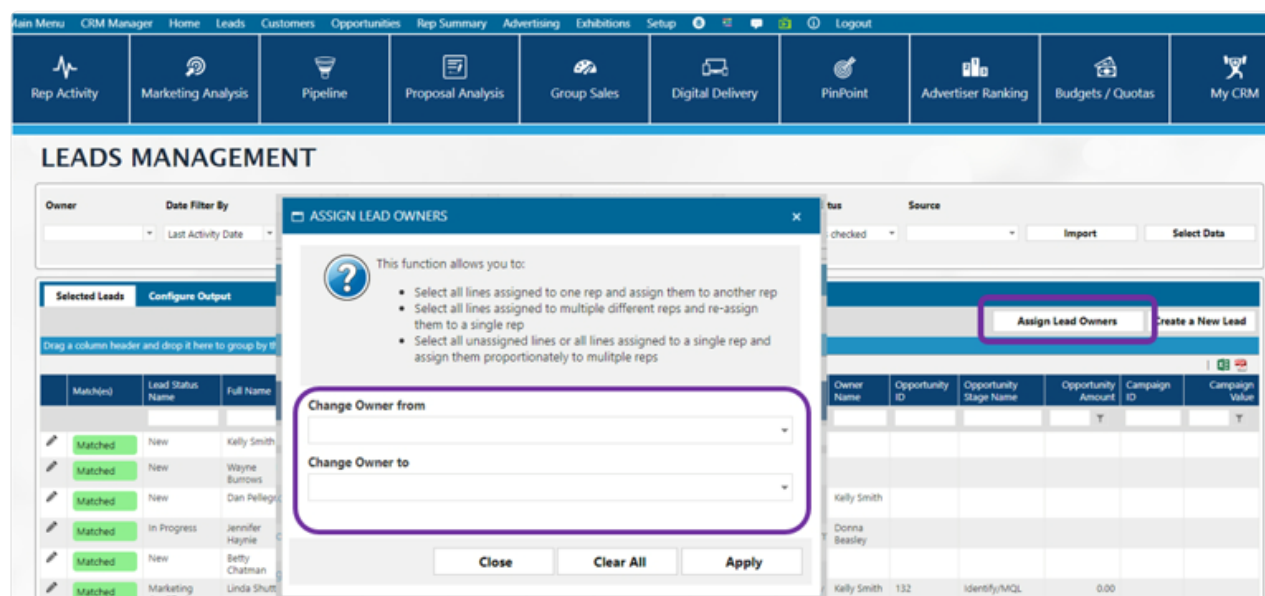
- Copy the Value into each line: This copies the same amount into each new line you split.
- Split the value evenly across all new lines: This divides the amount on the line across the split lines equally.
- Split the value proportional by days in the month: This divides the amounts across the month according to the number of days in that month.

Leads

The concept of leads management was introduced in the 2022.5 release. In this version we have added a couple new features to leads for better usability.

Navigate to CRM Module > Leads > Leads Dashboard.

Bulk Assign Lead Owners



You can now bulk-assign lead owners to imported leads by clicking on Assign Lead Owners and selecting one or more users to change owner from and two. Leave "Change own from" blank if you want to assign unassigned leads to one or more people.

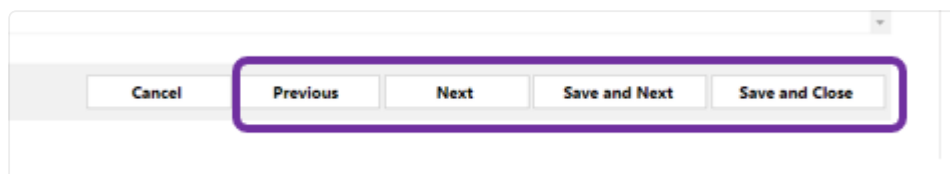
Also, on the import leads template and in the Leads API, there is now an owner ID field so that you can assign specific users as part of the lead creation process.

Navigate to Previous and Next Lead

Click on the pencil icon to edit a lead

The leads window that opens from the Leads Management Dashboard will now stay open as you work the leads and continue from one lead to the next with next, save

and next, & previous icons at the bottom of the window. This will save the user some clicks as they work down a list of several leads.



New Account, Contact, Actions, and Notes Field Settings

CRM Settings include a list of fields which in creating new accounts, new contacts, new notes and new to-do items from CRM module can be made mandatory for user to enter or marked with *** as important due to requirements in third party applications integrating with CRM. Security and requirement rules setup across Naviga apply and must be setup in the respective screens, such as in User Security, Group Security or Module System Parameters.

Navigate to the menu Setup → CRM System Settings → New Record Field Settings - > Other Tables.

Click the Node "Required Fields on New Records".

Field Name	Setting
Salutation	Not Required, but Display *** next to Label
First Name	Not Required, but Display *** next to Label
Middle Name	
Last Name	Required Field
Suffix	
Informal Name	
Job Code	Required Field
Job Title	
Gender	
International Tax ID	
Department	Not Required, but Display *** next to Label
Phone No.	Required Field
Mobile No.	
Fax No.	
Other Phone No.	
Country	
Address Line	

In the first section, set the New Contact Fields on the list as:

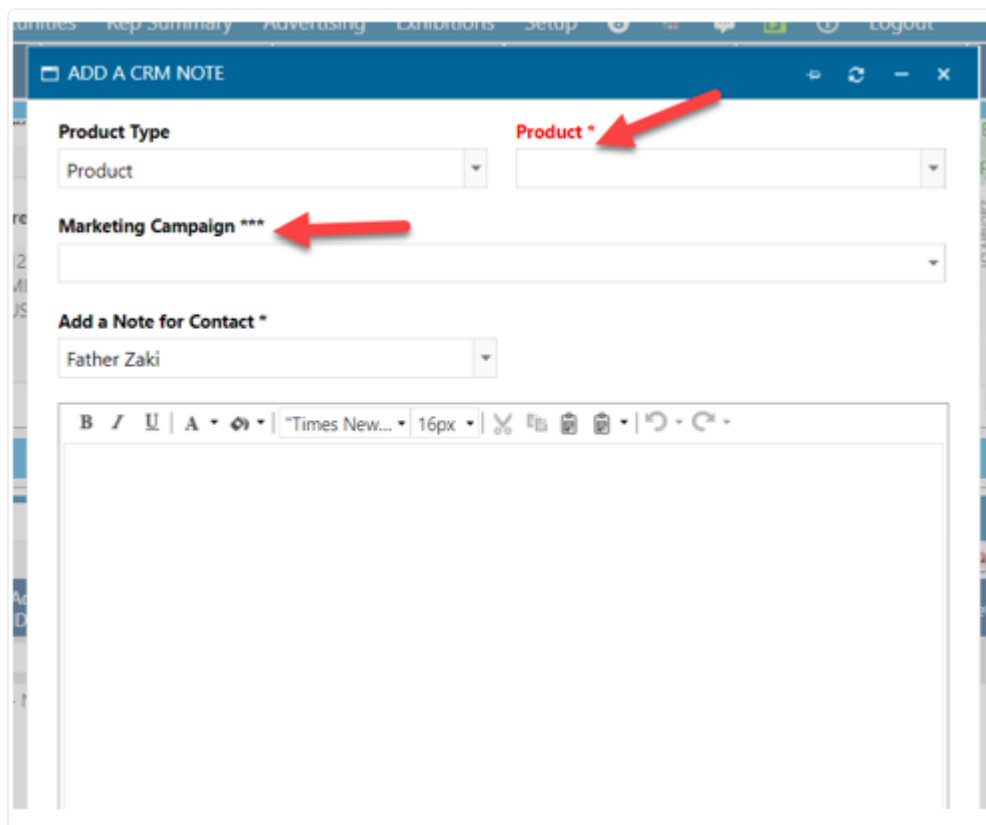
- Blank, leaving them as optional, or
- Required, making the field required where the record will not be saved when creating the contact if this field isn't entered, or
- Not Required, but Display *** next to Label, where the field is not mandatory, but the field has a label *** by it. This alerts the user to enter them because the fields are important for third party integrations.

Repeat this in the next section for New Account where it applies to new advertisers created in CRM.

Repeat for the third section "Action/ To-Do" fields. Also, for the "Notes" fields.

Save the settings. Navigate to create an account or contact or convert a CRM lead to an account.

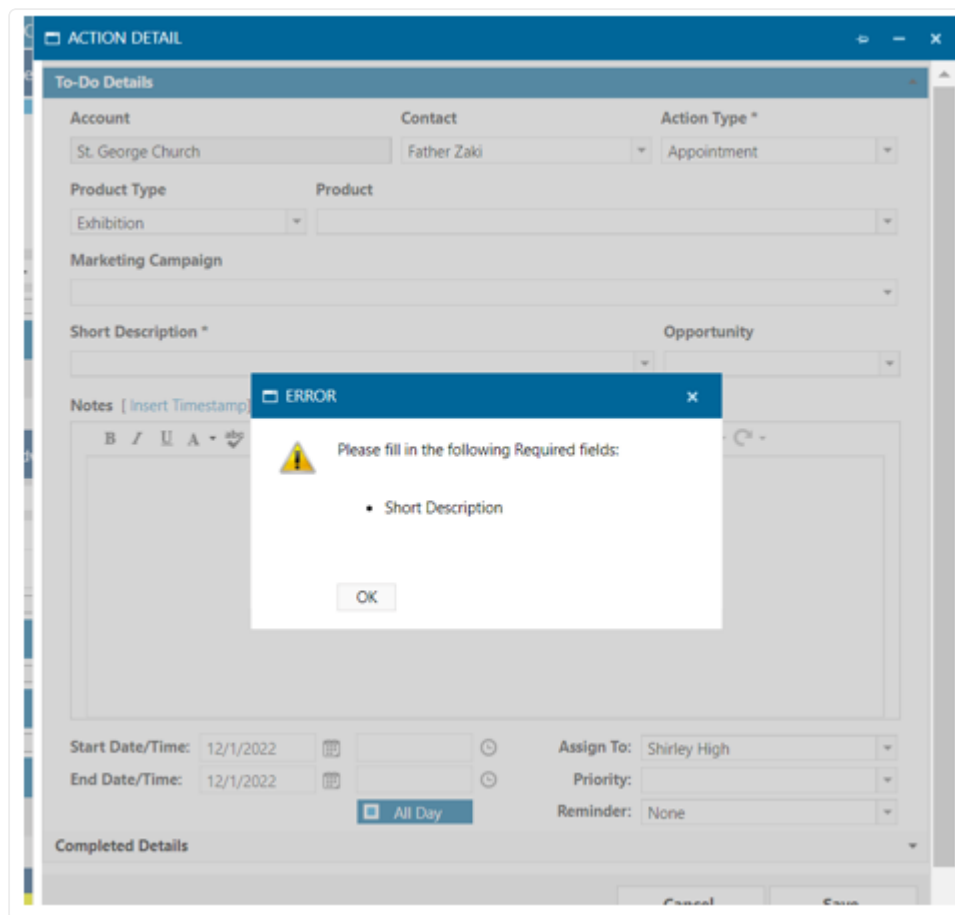
Navigate to a contact record in Customers → Customer Overview an account.



Click on New Note and note the fields are marked with a * for required. If you tab off the field without the entry, the field turns red in color.

Click New Actions.

If you tab through the fields without entering and attempt to save the action, the system displays the message listing the field as required.



Accounts Receivable Module

Quick Links for Payments

For security reasons, sometimes customers are reluctant to give credit card details over the phone, or it may be your business practice that you prefer not to take the credit card over the phone but rather to have the client enter payment information themselves through an online portal. If you are licensed to use to the Naviga Ad Client Portal, now your users can send a pay link to the client's email from various screens in the system.

- User navigates to A/R → Payments → Pay Invoice(s). User searches on the customer id and selects invoices to be paid by checking the box under the "Pay" column.

APPLY PAYMENT

Selection Criteria
Customer ID: 201371 Inv No Sub
Customer Name: Statuck's
Credit Status: **In Good Standing**
Preferred Address: 12323 SW 55TH ST STE 1005
COOPER CITY, FL 33330

Currency ID: Leave Blank for Local
Currency: Local / System Default
Apply Period: 2023-01
Credits Taken: 0.00
Invoices Paid: 0.00
Amount to Charge: 0.00

A/R Aging

0-30 Days	0.00
31-60 Days	0.00
61-90 Days	0.00
91-120 Days	0.00
120+ Days	-149,148.85
COA	43,019.98
Pre-Payments	-5,442.29
Account Balance	-111,571.16

Open Invoices **Open Credits**
Lookup an Invoice New Credit/Debit Start Over Show Filtering Options

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

ID	Entered On	Days Overdue	Reference	Billing Currency	Amount	Balance	Available Discount	Pay	Apply Amount	Pay Amount	Discount Taken	Write Off Amount	Balance After Payment	Write Off	View PDF
INV1517423T	10/31/2021	430	Demo Group		1,209.60	509.60	0.00	☐					509.60		
ABC1519443T	8/26/2022	131	ABC - Kelly's Co. - Plan Ads		4,910.20	4,910.20	0.00	☐					4,910.20		
ABC1519444T	8/26/2022	131	ABC - Kelly's Co. - Test Auto-Adjustment w/Wizard		4,838.40	4,838.40	0.00	☐					4,838.40		
ABC1519600T	8/31/2022	126	ABC - Kelly's Co. - Plan Ads		1,025.95	1,025.95	0.00	☐					1,025.95		
					11,984.15	11,284.15	0.00		0.00	0.00	0.00	0.00			

Reset
Send a Pay Link
Enter Payment

- User navigates to A/R → Payments → Pre-Pay an Order. User searches on the customer id and selects Confirmed but not invoiced orders to be paid by checking the box under the "Pay" column and then select the "send a Pay Link" button.

PRE-PAY ORDERS

Selection Criteria
Customer ID: 255078 Inv No Sub
Customer Name: Underwater World Horsham
Credit Status: **In Good Standing**
Preferred Address: 495 Easton Rd
HORSHAM, PA 19044
Tel: (215) 672-4180
Advertiser: Underwater World Horsham

Currency ID: Leave Blank for Local
Currency: Local / System Default
Apply Period: 2022-09
Orders Paid: 0.00
Amount to Charge: 0.00

A/R Aging

0-30 Days	124.16
31-60 Days	0.00
61-90 Days	0.00
91-120 Days	0.00
120+ Days	32,783.83
COA	0.00
Pre-Payments	-88,803.33
Account Balance	-55,895.34

Advertising Campaigns

ID	Brand	Product Group	Start	End	Currency	Gross Amount	Commission Amount	Net Amount	Est. Tax	Balance	Pay	Pay Amount	Balance After Payment
11531	Underwater World	ABC - Kelly's Co.	1/1/2023	3/31/2023		52,000.00	0.00	52,000.00	0.00	52,000.00	☐		52,000.00
11605	Underwater World	ABC - Kelly's Co.	1/1/2023	1/31/2023		5,080.00	0.00	5,080.00	4.00	5,084.00	☐		5,084.00
7717	Underwater World	Demo Group	12/21/2022	1/20/2023		155.62	0.00	155.62	0.00	155.62	☐		155.62
11522	Underwater World	ABC - Kelly's Co.	12/14/2022	1/31/2023		5,400.00	0.00	5,400.00	0.00	5,400.00	☐		5,400.00
11493	Underwater World	ABC - Kelly's Co.	12/1/2022	12/31/2022		7,080.00	0.00	7,080.00	104.00	7,184.00	☐		7,184.00
						1,617,412.05	11,820.01	1,605,592.04	13,147.02	1,609,405.7		0.00	

Reset
Send a Pay Link
Apply

- In the Advertising or CRM Module, From the Accounting tab on the Customer details screen the user selects one or multiple invoices from the list of open invoices and then selects the "Send a Pay Link" option. If the user does not have access to take payments themselves, they might not see the checkboxes circled in the screenshot below. They can still send a pay link and select the relevant invoices in the next screen.

Open Invoices											
Paid Invoices											
Transferred Invoices											
Payments											
Card Transactions											
Statements											
View All Open Invoices											
Email Selected Documents											
Send a Pay Link											
ID	Date	Age by Inv. Date	Age by Due Date	Brand	Reference	Amount	Balance	Disputed	Pay	View PDF	
ABC15181267	2/1/2022	337	307	Underwater World	ABC - Kelly's Co. - Testing Portal	2,100.00	95.50	No	1		☒
ABC15194687	8/26/2022	131	101	Underwater World	ABC - Kelly's Co. - Testing Default profile	8,100.00	8,100.00	No	1		☒
ABC15194707	8/26/2022	131	101	Underwater World	ABC - Kelly's Co. - CLS Package	21,707.16	21,707.16	No	1		☐
ABC15195027	8/26/2022	131	101	Underwater World	ABC - Kelly's Co. - Test Metadata	2,590.02	2,590.02	No	1		☐
ABC15195077	8/26/2022	131	101	Underwater World	ABC - Kelly's Co. - CLS Package	191.85	191.85	No	1		☐
ABC15196117	8/31/2022	126	96	Underwater World	ABC - Kelly's Co. - CLS Package	99.30	99.30	No	1		☐
DEM15198347	12/22/2022	13	-17	Underwater World	Demo Group - CLS Package	124.16	124.16	No	1		☐
		143	113			34,912.49	32,907.99				

- From a Campaign in Reserved or Confirmed Status user navigates to the Invoices and payments node and sends a paylink from there:

BILLING SUMMARY

Campaign Explorer

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

Billing Summary

Campaign ID: 1616
Advertiser: Backyard Beans
Brand: Backyard Beans
Agency:
Status: R1 - Signed Proposal Received

Start Date: 3/1/2023
End Date: 3/31/2023
Gross Amount: 4,000.00
Commission Amount: 0.00
Net Amount: 4,000.00
Est. Tax: 0.00
Currency: Local Currency

Pre-Payments

Enter a New Payment

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

Invoices

Invoice ID	Date	Amount	Tax	Total	Balance
-- No Records --					

Send a Pay Link

Regardless of which of the above screens you start from, you will next be taken to a screen allowing you to customize the message and select who to send the email to. If you have multiple portal profiles configured, and since this could potentially be paying for several invoices across profiles, the user must select the profile to use from the dropdown. Different messages could potentially be sent based on portal setup

<https://open.gitbook.com/~space/s2RD4oPdRVZTu0FtiAmu/~changes/Ior2eipVFEMBgbDVxzSD/~gitbook/pdf?back=false&only=yes&page=zfhZce2bBnoK...>

51/69

Main Menu

Customers

Invoices

Credit Control

APPLY PAYMENT

Selection Criteria

Customer ID

201371

Customer Name

Starbucks

Credit Status

In Good Standing

Preferred Address

12323 SW 55TH ST STE 1
COOPER CITY, FL 33330

Open Invoices

Open Credits

Quick Entry: Enter one or more Invoice IDs in this box

ID	Entered On	Days Overdue	Reference
IN1517423T	10/31/2021	430	Demo
ABC1519443T	8/26/2022	131	ABC -
ABC1519444T	8/26/2022	131	ABC -
ABC1519600T	8/31/2022	126	ABC -

SEND PAYMENT LINK

Select Invoice(s) to Pay

☐	ID	Date	Reference	Amount	Balance	Payment Amount
☒	IN1517423T	10/31/2021	Demo Group	1,080.00	509.60	509.60
☐	ABC1519600T	8/31/2022	ABC - Kelly's Co. - Plan Ads	916.10	1,025.95	0.00
☐	ABC1519443T	8/26/2022	ABC - Kelly's Co. - Plan Ads	4,384.40	4,910.20	0.00
☐	ABC1519444T	8/26/2022	ABC - Kelly's Co. - Test Auto-Adjustment w/Wizard	4,320.00	4,838.40	0.00
☐	CM2019T.1	2/17/2022		-1,433.00	-1,433.00	0.00

Send Email From

kelly.smith@navigaglobal.com

Portal Profile

Default - this profile has no restricti

Payment Amount

509.60

Email To

Sasha Chotovinsky (wgbla@aol.com)

Subject

Your Quick Pay Link from NAVIGA (DEV/DIGITAL)

Email Message

B / / U A - [Icons]

Click here to view your and process your payment.

Cancel

Send

A/R Aging

Allocations

Invoices Allocated

1

509.60

Credits Allocated

0

0.00

Discounts Taken

0

0.00

Write-Offs

0

0.00

Start Over

Show Filtering Options

Write-Off Amount	Balance After Payment	Write-Off	View PDF
	0.00	☐	
	4,910.20	☐	
	4,838.40	☐	
	1,025.95	☐	
0.00			

Send a Pay Link

Enter Payment

Client receives the email and upon clicking the link, will be taken to the portal, without needing to log in, and will be able to pay the selected invoices for the specified amounts. They cannot edit the amount to pay, nor can they do any other portal functions, unless they then log into the portal as they normally would.

naviga

Business Financial

Total Payment Amount: 13,000.00

Pay Selected Invoices

Download	Invoice No.	Reference	Date	Invoice Amount	Tax	Balance	Pay Amount
	EX166	Lifestyle 2019	9/24/2019	11,000.00	0.00	11,000.00	11,000.00
	EX167	Lifestyle 2019	9/24/2019	2,000.00	0.00	2,000.00	2,000.00
				13,000.00	0.00	13,000.00	13,000.00

Follow Us Online

find help online

About the Inquirer

Artwork Deadlines

Print Material Specs

stay informed

Corporate Headquarters

Naviga Global

7900 International Drive

Bloomington, MN 55425

+1.651.639.0662

info@somewhere.com

more about this site

Naviga Ad Portal™

2023.2 Build 230116.0201

To set up the default subject and email message navigate to A/R > Setup > Admin > A/R System Setup

Email Payment Link Settings

Email Payment Link is Valid for how many minutes?

Email Subject Line

Email Body

Click [here](#) to view your and process your payment.

Design </> HTML

- Enter the desired amount of time to allow this link to be valid for (in minutes)
- Enter the desired default Subject Line text
- Using the Design and HTML tabs at the bottom, create your desired default text. Here is our sample HTML from above:

```
<p style="font-size: 16px"><a style="font-size: 16px; font-weight: bold"
href="#LINK#">Click here</a> to view your and process your payment. <br>
<br>
</p>
```

The only tag available for this template is the **#LINK#** tag which will give you the URL for the temporary link.

Sales Rep included on A/R Aging Detail Download

When viewing the A/R Aging Detail report (A/R Module → Reporting → A/R Aging Detail), there are some download options at the top of the screen. The two options

with invoice level details (Download Transactions to PDF and Download Transactions to Excel) will now also include the sales rep(s) in the details

A/R AGING DETAIL

Selection Criteria

Select by

Period

As of Period

2023-01

Company

Leave Blank for All Companies

Client(s)

X

Select a Customer or Enter ID

Currency

Leave Blank for All Currencies

Sort Order

Client Name A-Z

Include Collection Agencies

No

Get Data

Download Transactions to PDF

Download Transactions to Excel

Download Client Summary to Excel

Aging Detail

Client ID	Client Name	No. of Transactions	2023-01	2022-12	2022-11	2022-10	2022-09	Unapplied Amount	Balance
		T	T	T	T	T	T	T	T
> 100104	Action Life	1	0.00	0.00	0.00	0.00	0.00	-500.00	-500.00
> 100025	Acura Financial Services	17	0.00	20,501.20	408.96	408.96	1,359.50	0.00	22,678.62
> 100262	Atlanta Braves	1	0.00	0.00	0.00	0.00	0.00	-500.00	-500.00
> 100090	Audi UK	11	0.00	167.03	161.68	167.07	9,104.21	0.00	9,599.99
> 100136	B&H Photo	31	0.00	1,697.09	6,063.51	1,645.18	8,381.67	0.00	17,787.45
> 100068	Bacardi USA Inc	2	0.00	0.00	0.00	0.00	763.92	-13,308.31	-12,544.39
> 100143	Backyard Beans	26	0.00	5,495.40	4,396.32	4,396.32	34,049.16	0.00	48,337.20
> 100047	Bank Of Boston	25	0.00	494.15	395.32	395.32	2,668.77	0.00	3,953.56
> 100009	Bayer Diagnostics, Inc	9	0.00	28,000.00	22,400.00	22,400.00	75,800.00	0.00	148,600.00
> 100293	Bethesda North Hospital	3	7,185.00	7,388.52	1,750.00	0.00	0.00	0.00	16,323.52
> 100057	BMW of North America, LLC	25	4,000.00	70,825.60	11,879.85	19,875.44	42,267.00	-533.33	148,314.56

There could be more than one rep on an invoice, depending on setup, so we should
Rep 1, Rep 2, Rep 3 and Rep 4 (Names and ID's)

[illegible]

 **Credit Rating added to the A/R Aging Detail Summary**
Download

A/R AGING DETAIL

Selection Criteria

Select by

Period

As of Period

2023-01

Company

naviga (01)

Client(s)

Select a Customer or Order ID

Currency

Leave Blank for All Currencies

Sort Order

Client Name A-Z

Include Collection Agencies

No

Get Data

Download Transactions to PDF

Download Transactions to Excel

Download Client Summary to Excel

Aging Detail

R	S	T	U	V	W	
phone	Payment Terms	Credit Limit	Credit Rating			
		0				
664545	N60	250,000.00				
		0				
558989	N60	500,000.00				
681321	2N30	250,000.00				
738511	N60	250,000.00				
567890	N30	300,000.00				
	N30	250,000.00				
593544	N30	500,000.00	Poor			
65-1111	N60	100,000.00				
311117	N60	3,000,000.00				
679878	N60	250,000.00				
797330	N60	250,000.00	Poor			
		0				
	N60	500,000.00				
072483	N60	250,000.00	Poor			
62-6303	N60	100,000.00				
66-7763	N60	100,000.00				

The rating information comes from here on the Name Maintenance screen, on the A/R node:

Credit Info

Credit Rating

Poor

Credit Limit

500,000

Credit Stop Days (Book)

0

Credit Stop Days (Adj)

120

A/R Statement Email Overrides

Navigate to Setup → Admin → A/R System Setup

There are now two new fields on this screen related to Statements

Naviga Statement Forms	
Use Naviga Forms	☒ Yes
Default Naviga Statement Form	Statement with Details
Default Naviga Statement Form for Agencies	Agency Statement Template
Default Naviga Statement Form for Parent Companies	Statement with Details
Email Invoice Subject Line	Statement attached
Email Invoice Body	Please find attached Statement of account.
Override Email From Address	
Override Email To Address	

- **Override Email From Address** - This will display the desired from address (perhaps "statements@mediacompany.com" or "accounting@mediacompany.com")
- **Override Email To Address** - This will override the To email address to be a specific email address. This comes in handy when you are testing a new statement form, or during an implementation where you don't want to risk sending test statements out to actual clients.

Credit Card Option

New option has been added to A/R Parameters. Navigate to Setup → Admin → A/R System Setup and scroll all the way to the bottom.

Prompt to Save Card on File - This is a Yes/No flag that is set to no by default, which will mean it will continue to behave as it always has. If you would like to use in production it will need to be tested with your specific credit card gateway to ensure compatibility. Different gateways offer different options.

Credit Card Options	
Prompt to Save Card on File	☐ No

If set to yes, the user will be prompted in the credit card entry if that card should be saved for future use.

The screenshot shows a 'PROCESS PAYMENT' window with a blue header bar. The main form contains the following fields:

- Amount to Pay: 56,638.67
- Bill-To Client: Kross
- Payment Type: Credit/Debit Card (dropdown)
- Bank: FIRST UNION-- NavigaPay Aut (dropdown)
- Card to Charge: (empty)
- Save Card: ☒ Yes
- Card Type: (empty)
- Description: (empty)
- Card Status: (empty)
- Last Charged: (empty)
- Card Number: (empty)
- CVV: (empty)
- Expire Date: MM / YYYY (dropdowns)
- Card Holder Name: (empty)
- Billing Country: (empty)
- Telephone: (empty)
- Email: (empty)

A modal dialog box titled 'SAVE PAYMENT METHOD' is overlaid on the form. It contains a question mark icon and the text: 'Would you like to Save this Payment Method for future use?'. Below the text are two buttons: 'Yes' and 'No'.

At the bottom right of the 'PROCESS PAYMENT' window is a button labeled 'Process Payment Now'.

Direct Debits

For many years we have had a process called SEPA Direct Debits that was used by the European market. We now have an additional process that produces a payment batch and output file that will be used by some Canadian media companies. The functionality is similar, but the output from each process is different and created according to the standard formatting from those countries.

Prerequisites

1. At the company level, you need to set up your bank details. Navigate to System Settings → Setup → Company Setup. Scroll down to Electronic Payments section and enter these three fields

Electronic Payments	
SEPA Reference	
IBAN	
Swift BIC No.	
Bankgiro	
Postgiro	
International Tax ID	
Origination Control Data	123456
Originating Direct Clear ID	7890123
Default Bank Code	Bank of America

2. On your client accounts, on the A/R Node, scroll down to the Electronic Payments section. These 4 fields are relevant to the Direct Debits.
- The first field indicated that yes, this client will use electronic Payments
 - The IBAN is the Individual's Bank Account Number
 - In the Swift field, enter the Bank's Identifying number (Routing number)
 - If desired, can enter the Date of Signature as the date the client authorized the direct debit.

Electronic Payments

Use Electronic Payments
☒ Yes

SEPA Reference

IBAN

Swift BIC No.

Date of Signature



First Time
☐ No

Processing the Transactions

Under the Payments menu in A/R, select the Process Pre-authorized Debits option. For those familiar with the credit card "use for balance clear" option, this screen will look familiar. The difference here is that the Company field is required (since that is where we entered the bank info) and each company will need to be run separately.

PROCESS PREAUTHORIZED DEBITS

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
LEAD	naviga	Run by Invoice Date	All Clients		0 Days and Older	1.00	1,000,000,000.00	☒ Yes	☒ Yes	Get Clients

Selection

- Company B (02)
- Company C (03)
- New Company (04)
- naviga (01)

ID	Customer Name	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	
100136	B&H Photo		226	0.00	1,697.09	675.93	7,032.76	8,281.67	0.00	0.00	17,687.45	17,687.45		☐
			226	0.00	1,697.09	675.93	7,032.76	8,281.67	0.00	0.00	17,687.45	17,687.45		

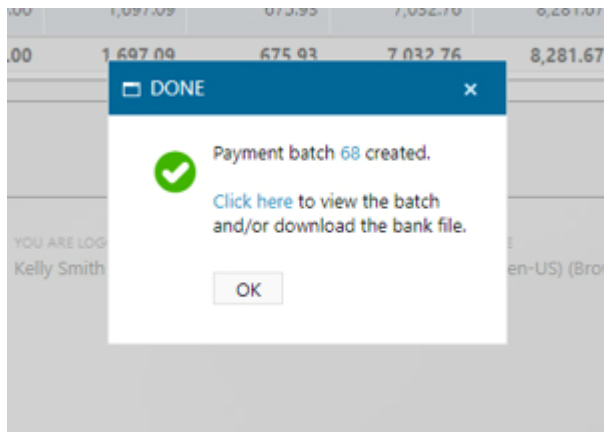
NAVISA™ 2023.1 Build 230209.0239 | ACCOUNT DEM | YOU ARE LOGGED IN AS Kelly Smith (KELLY.SMITH) | SECURITY GROUP ROOT | LANGUAGE English (en-US) (Browser Default) | © 2023 NAVISA All Rights Reserved

Enter other search filters as desired. and click "Get Clients"

List of clients will be displayed. Click the checkboxes at the end of each row (or at the last header) to select single accounts or select all.

Once selected the payment amount will default to the total balance on the account, but it can be adjusted if you wish to pay a partial amount.

Click the button at the bottom and it will create the payment batch.



Click the batch ID to open the batch and download the file

A/R BATCH REVIEW

Details

Batch No.

68

↻ ↺ +

Financial Period

2023-02

▼

Deposit Date

2/9/2023

📅

Batch Type

▼

Bank

Bank of America

▼

Bank Currency

▼

Allocation Currency

▼

Batch Totals

1

250.00

Entered

1

250.00

Difference

0

0.00

Entered By

Kelly Smith

Entered On

2/9/2023

Batch is Closed

☒ Yes

Download Bank File

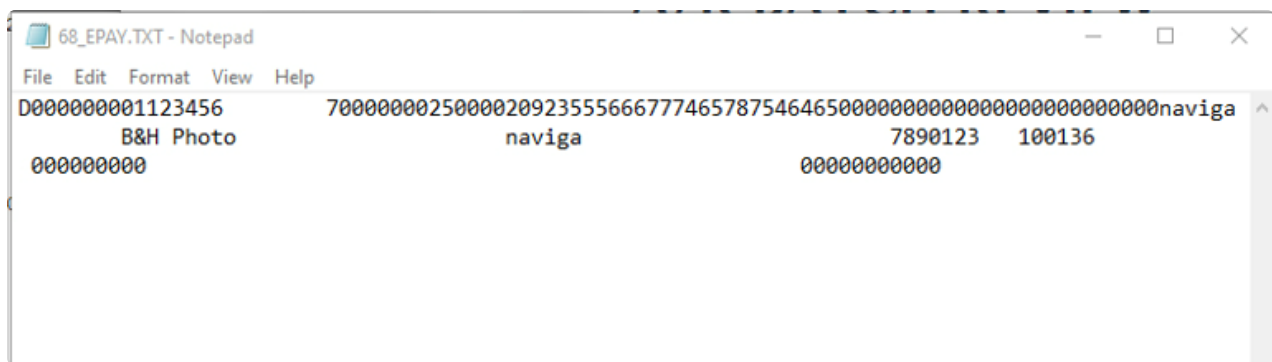
Customer ID	Customer	Check No.	Amount	Balance
100136	B&H Photo	351.EP	250.00	0.00
			250.00	0.00

Delete

Reset

Save

Not an easy reading document, but it is output in the format the banks require.



Note that this produced the payment batch and these invoices are marked as paid in the system.

If there are any payments that fail to process when you send the file to the bank, then those payments will need to be manually reversed in Naviga ad.

Easiest way to reverse the check would be to select the payment ID from the batch (or search for it in the payments report) and then in the top right either Void the check (if it hasn't posted to the G/L) or Return the check if void is no longer an option.

Find a previous batch

Navigate to Payments → SEPA Direct Debit Processing

The Direct Debit Batches for Pre-authorized Direct Debits are in the same location as those for the SEPA Payments. Click on the Direct Debit Batches node.

Select a From Date, and click on Get Batches. All batches for the selected date will be displayed. If it was a SEPA batch, the downloadable file will be in the SEPA column, otherwise it will be in the Preauthorized Debit File column. Click the file icon to download.

ELECTRONIC PAYMENTS

SEPA Direct Debit Batches

Electronic Payments

SEPA Direct Debit Processing

Direct Debit Batches

Electronic Payment Batches

Select From Date1/9/2023

Get Batches

Selected Batches

Batch ID	Created By	Created On	Bank ID	Bank Name	Company ID	Company Name	No. of Invoices	Total Amount	SEPA Direct Debit XML File	Preauthorized Debit file
67	KELLY.SMITH	2/9/2023	BA	Bank of America			1	100.00		
68	KELLY.SMITH	2/9/2023	BA	Bank of America			1	250.00		
							2	350.00		

Masked Credit Card number added to CC Receipt Template

New merge tag was added to Credit Card Receipt Template. Along with this request, we also redesigned the template screen to be more like our other templates, like the order confirmation. The editor window is now a little wider and the merge tags are available in a popup.

RECEIPT TEMPLATES

Document Explorer

Receipt Templates

Create New

Receipt

Ribbon Template - 3"

Settings

Template ID27

Title / NameReceipt

Description

Document SizePortrait

Active

Created On04/10/2020

Created ByK3MTH

Last Updated on02/10/2023

Last Updated byK3MTH

View Merge Fields Documentation

PAYMENT RECEIPT

payee information

Account No.#CLIENT_ID#

Customer Name#CLIENT_NAME#

payment detail

PaymentReceipt No.#PAYMENT_ID#

Payment Date#PAYMENT_DATE#

Payment Method#PAYMENT_METHOD#

Payment Contact#ACCOUNT_NUMBER#

Card No.#MASKED_CARD_NUMBER#

Payment Amount#PAYMENT_AMOUNT#

invoices paid

Invoice No.	Date	Description	Invoice Amount	Paid Amount	Balance
#ID#	#DATE#	#DESCRIPTION#	#INVOICE#	#PAID#	#BALANCE#

PAYMENT RECEIPT

payee information

Account No.100005

Customer NameStarbucks

payment detail

Payment/Receipt No.349.CC

Payment Date2/8/2023

Payment MethodCredit Card (Auth: 532023020809303698922)

Payment Entered ByW.SERVICE USER

Card No.411111*****1111

Payment Amount3,499.00

orders pre-paid

Order No.	Order Type	Paid Amount
1613	Digital Advertising Order	3,499.00

Credit Card Type added as a filter in Custom List of A/R Payments

Navigate to Payments → List of Payments report and selec the Custom List of Payments node. Credit Card type has now been added as a filter. This allows you to easily run the report for VISA/MC separately from Amex for easier reconciliation.

CUSTOM LIST OF A/R PAYMENTS

List of Payments

Payments

List of Payments Received

List of Cash on Account

List of Payments by Currency

List of Payments by Module

List of Payments by Bank

List of G/L Payments

Custom List of Payments

List of Imported Payments

Payment Selection

Selection Type

Financial Period

Entry Date Range

Deposit Date Range

Start Period

2023-02

End Period

2023-02

Company

Bank

Currency

Batch Type

Module

Payment Type(s)

Card Type(s)

Credit Controller

American Express

Chiners Club

Discover Card

MasterCard

Visa

Debit Card

Laser

Maestro

Solo

Switch

Visa Electron

Interac

Batch No.

Return Cash on Account Only

Client(s)

Entered By

Get Payments

Generate PDF Report

✔ Transient Name added to payment reports

Navigate to Payments → List of Payments report and select List of Payments by Bank (or any other payment report)

LIST OF A/R PAYMENTS BY BANK

List of Payments

- List of Payments Received
- List of Cash on Account
- List of Payments by Currency
- List of Payments by Module
- List of Payments by Bank**
- List of iGL Payments
- Custom List of Payments
- List of Imported Payments

Payment Selection

Selection Type ☒ Financial Period ☐ Entry Date Range ☐ Deposit Date Range

Start Period 2022-12
End Period 2022-12
Bank Edgill Bank

Selected Payments

Page: 1 of 1 Page size: 7

Payment ID	Client	Period	Batch No.	Batch Type	Date Entered	Deposit Date	Card Type	C.O.A. Module	C.O.A. Product	Payment Type	Local Amount	Cash on Account	Payment Currency
336.CC	Self-Service Account (someone new)	2022-12	12/06/22CC		12/6/2022	12/6/2022	VISA	Advertising	Naviga Product Group	CC	157.84	0.00	
336.CC	Self-Service Account (Kelly Smith)	2022-12	12/02/22CC		12/2/2022	12/2/2022	VISA	Advertising	Naviga Product Group	CC	263.94	0.00	
337.CC	Self-Service Account (Smith Kelly)	2022-12	12/02/22CC		12/2/2022	12/2/2022	VISA	Advertising	Naviga Product Group	CC	157.84	0.00	
338.CC	Self-Service Account (Kelly Smith)	2022-12	12/02/22CC		12/2/2022	12/2/2022	VISA	Advertising	Naviga Product Group	CC	47.70	0.00	
334.CC	Underswater World	2022-12	12/01/22CC		12/1/2022	12/1/2022	VISA	Advertising	Naviga Product Group	CC	149.00	0.00	
335.CC	Underswater World	2022-12	12/01/22CC		12/1/2022	12/1/2022	VISA	Advertising	Naviga Product Group	CC	149.00	0.00	
333.CC	Self-Service Account (Darren Jacobs)	2022-12	12/01/22CC		12/1/2022	12/1/2022	VISA	Advertising	Naviga Product Group	CC	157.84	0.00	
											1,083.46	0.00	

Page: 1 of 1 Page size: 7

Notice that the Transient account name now also has the person's first and last name included to make it easier to find payments.

Exhibition Module

Proof Of Insurance Valid Through Date Added to CRM Customer screen

In the Exhibition module there is a concept of receiving proof of insurance from an Exhibitor and setting a valid through date on the insurance. The Insurance information was displayed on the Customer Name Maintenance screen on the Exhibitions node:

Billing Info

Proof of Insurance received

☒ Yes

Proof of Insurance valid thru

Sunday, December 31, 2023

Tax Code

No Tax

Terms

Net 30

Delivery Method

Print

Name

Phone

Email

Edit

Remove

-- No Records --

Link a Contact:

Select a Contact

New Contact

+

Cancel

Save

Oftentime the rep does not actually have access to the Name Maintenance screen though, so the infomation has now also been added to the CRM Account View Screen:

BAYER DIAGNOSTICS, INC

CUSTOMER NATIONAL ACCOUNT

Overview

Other

Rep Access

Primary Industry

Annual Revenue / Tier

Secondary Industry

Employees / Tier

Proof of Insurance valid thru

Sunday, December 31, 2023

Aliases

No Aliases

Map

Addresses

My Contacts

Selected Address

63 North St

63 North St, Medfield, MA 02052

View larger map

Map

Medfield

Sales by Year

Sales by Product

Sales by Format

Sales by Division / Brand

Insights

2018

2019

2020

2021

2022

2023 YTD

Total

Bayer Diagnostics, Inc

0

12,400

163,218

412,000

261,200

0

848,818

Advertiser Portal

✓ Remove Status column from Orders view

There was a request to remove the campaign status column from the portal on the orders view.

Messages

Specials

Invoices

Orders

Proposals

Materials

Settings

Specials

Invoices

Orders

Proposals

Materials

Forms

Print Advertising Orders

Online Advertising Orders

Exhibition Orders

Current / Running Orders

Order No.	Product	Description	Start	End	Performance	Cost									
Manage this Order ID: 1414-4369	Naviga Network	Targeted CPM Rate	6/22/2022	6/22/2023	0% <table> <tr> <td>Goal</td> <td>Ad Server</td> <td>3rd Party</td> </tr> <tr> <td>35,000</td> <td>None yet</td> <td>None yet</td> </tr> <tr> <td>as of</td> <td>Never</td> <td>Never</td> </tr> </table>	Goal	Ad Server	3rd Party	35,000	None yet	None yet	as of	Never	Never	700.00
Goal	Ad Server	3rd Party													
35,000	None yet	None yet													
as of	Never	Never													
Manage this Order ID: 1414-4370	The Navigator Website	Open CPM Rate	6/22/2022	6/21/2023	0% <table> <tr> <td>Goal</td> <td>Ad Server</td> <td>3rd Party</td> </tr> <tr> <td>\$0,000</td> <td>None yet</td> <td>None yet</td> </tr> <tr> <td>as of</td> <td>1/25/2023</td> <td>Never</td> </tr> </table>	Goal	Ad Server	3rd Party	\$0,000	None yet	None yet	as of	1/25/2023	Never	500.00
Goal	Ad Server	3rd Party													
\$0,000	None yet	None yet													
as of	1/25/2023	Never													
Manage this Order ID: 1468-4649	The Navigator Website	Open CPM Rate	10/1/2022	3/31/2023	0% <table> <tr> <td>Goal</td> <td>Ad Server</td> <td>3rd Party</td> </tr> <tr> <td>\$0,000</td> <td>None yet</td> <td>None yet</td> </tr> <tr> <td>as of</td> <td>Never</td> <td>Never</td> </tr> </table>	Goal	Ad Server	3rd Party	\$0,000	None yet	None yet	as of	Never	Never	500.00
Goal	Ad Server	3rd Party													
\$0,000	None yet	None yet													
as of	Never	Never													

✓ Prepay for Campaigns through the Advertiser Portal

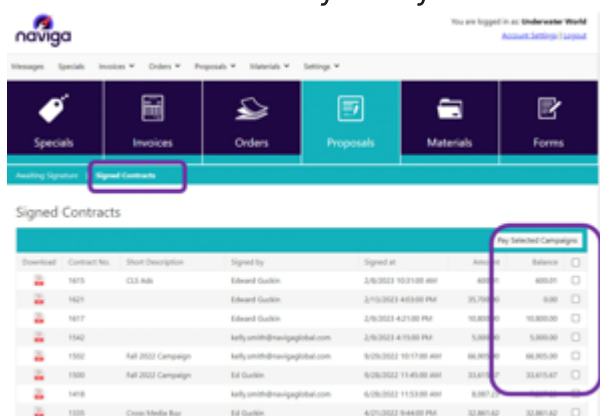
Woo-hoo! I am as excited as you are for this one! There are now THREE ways to prepay for your campaign through the portal.

1. If you Login and there is a proposal or a renewal on the proposal tab for you to sign, the client can sign the proposal as they normally would, but upon submitting the signature, there is a new option:



2. If the client is logged in and already signed the proposal, but didn't pay for it immediately as per example 1, they can later come back in and select the signed contracts view on the proposals tab and then select one or more campaigns to

pay for. Note, once the campaign has started invoicing they won't be able to prepay for it on this screen, but they can go to the invoices screen and pay invoices there as they always have.



- And finally, even if the client doesn't log into the portal, and you are only using the portal functionality for proposal signatures, the user can still pay for the order when they sign the proposal from the link provided in the order proposal. The screen would look just like in example 1 above. The client will sign off on the proposal as they always have, and then on the screen that confirms that their signature was received, they can click the "pay for this order" link.

All the above ways are ways that the client can self-direct at their convenience to approve proposals and pay for orders through the portal. There is one additional way that the client can pay through the portal and that is by using the "pay links" feature that was described earlier for paying invoices and orders.

Two new settings in the Portal setup are related to this new feature.

The screenshot shows the 'Proposal Signature Settings' form. It has a title bar 'Proposal Signature Settings' and a section header 'PROPOSAL SIGNATURE SETTINGS'. There are five numbered settings:

- UPON SIGNATURE, SET CAMPAIGN STATUS TO: R1 - Signed Proposal Received (dropdown menu)
- UPON PRE-PAYMENT, SET CAMPAIGN STATUS TO: R3 - Inventory held in GAM (dropdown menu, highlighted with a red box)
- ONLY CHANGE STATUS ON PRE-PAY IF AT LEAST THIS PERCENT IS PAID: 50 % (text input, highlighted with a red box)
- HIDE PROPOSALS WHERE ACCOUNT IS PENDING APPROVAL: ☐ No
- HIDE PROPOSALS THAT ARE PENDING APPROVAL: ☐ No

#2 - Setting #2 above allows you to set a different status after the order has been paid. For example, R1 might be your status after signing the proposal, but then once you pay for it, then it changes to R3 or CO perhaps.

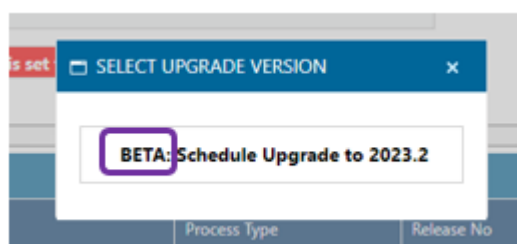
#3 - This setting will only change the status on an opportunity if at least x% of the total campaign amount has been paid.

System Administration

Taking new releases

If your account is set that you can take Beta Releases (unusual and will only ever happen on your test account unless you are not live), then you will be able to see a warning that you are able to take Beta releases here:

Also, when you click the button to schedule an Auto-Upgrade, you will see notification reminding you if the release is a beta release:



If there are multiple versions available in this list, you will easily be able to spot the beta release from a normal release as the Beta one will be clearly indicated with

"BETA" at the front.