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 verison.

☑ 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.

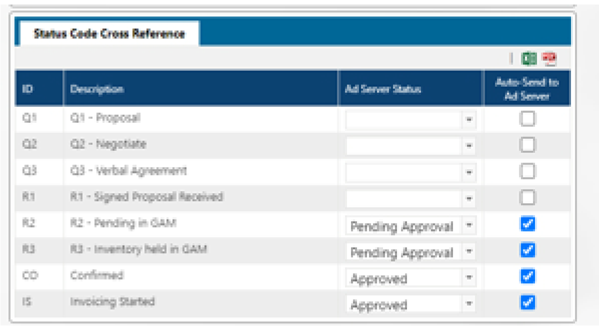
Advertising Module

Google Ad Manager (GAM) Changes

Workflow Settings / Status Code Settings

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

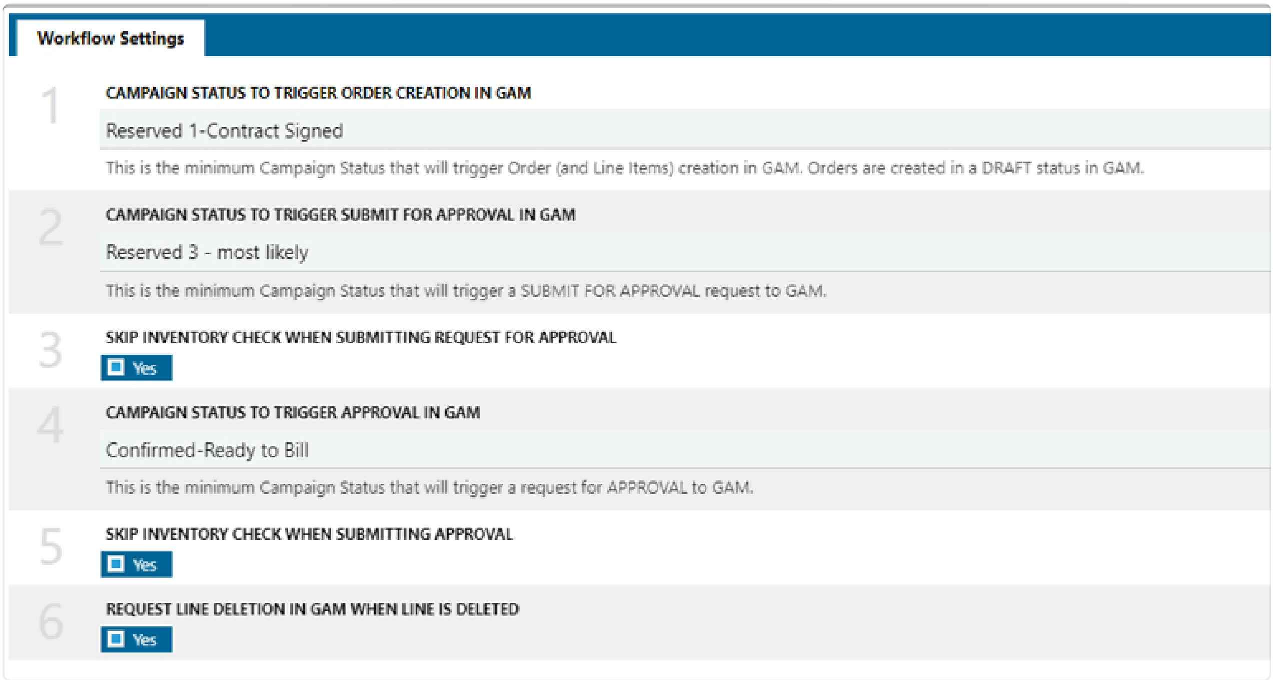
In versions Prior to 2023.1, the bottom section was called Status Code Cross Reference and looked like this:


Status Code Cross Reference

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 Campagin Status.

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



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.

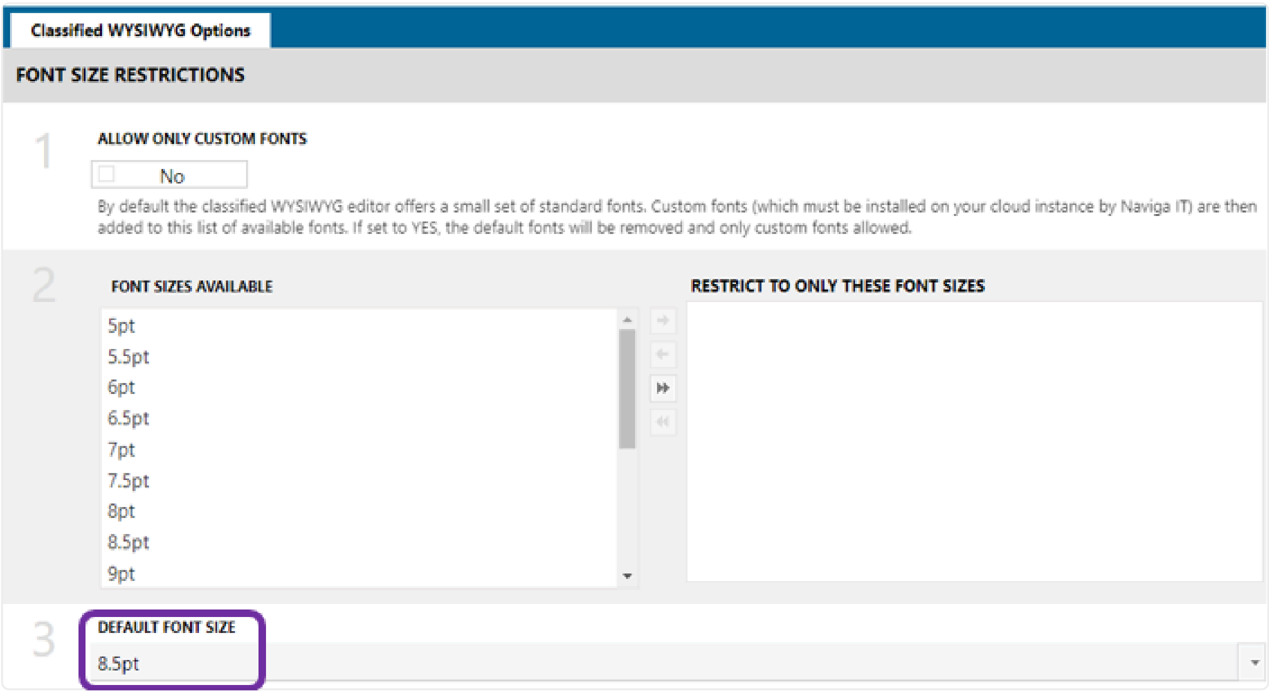
> ⚠ There is a conversion that will run at the time of upgrade that will take the settings from the first profile (if you have multiple) and convert it to the new format. Please check these settings and ensure it is how you want them before booking live orders.

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

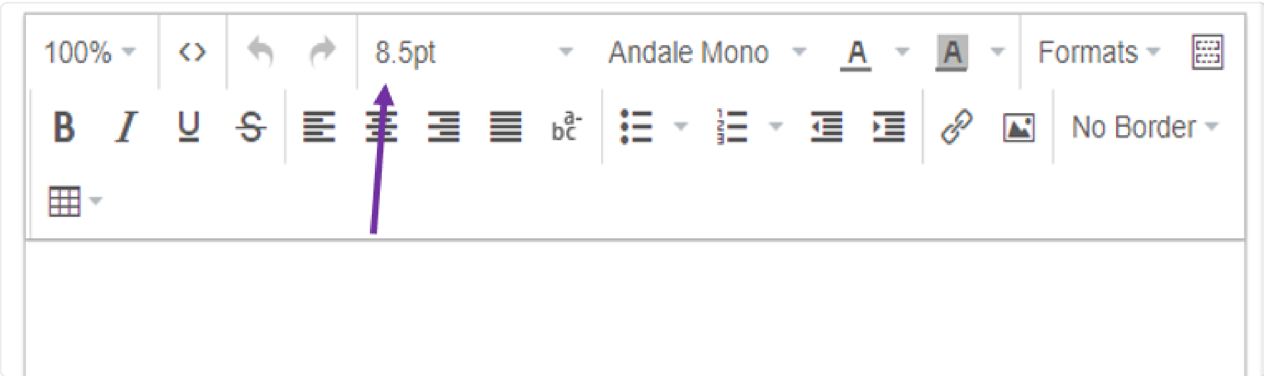


New Option available in the Classified WYSIWYG Options to set a default font size.

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.

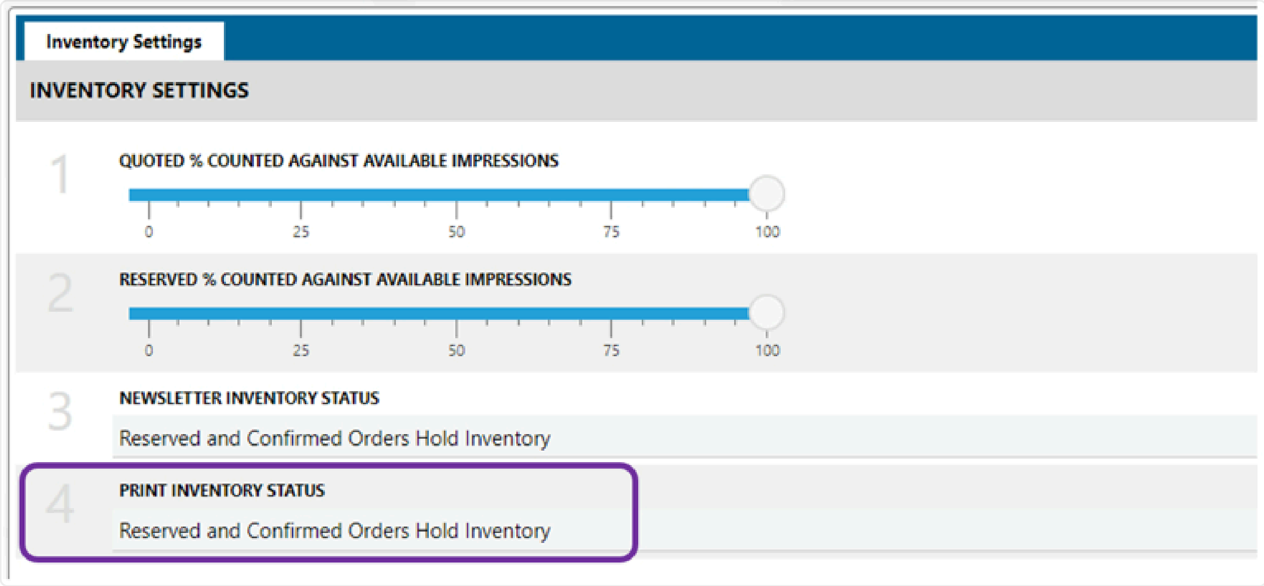
Testing Notes for Default Font Size:

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.



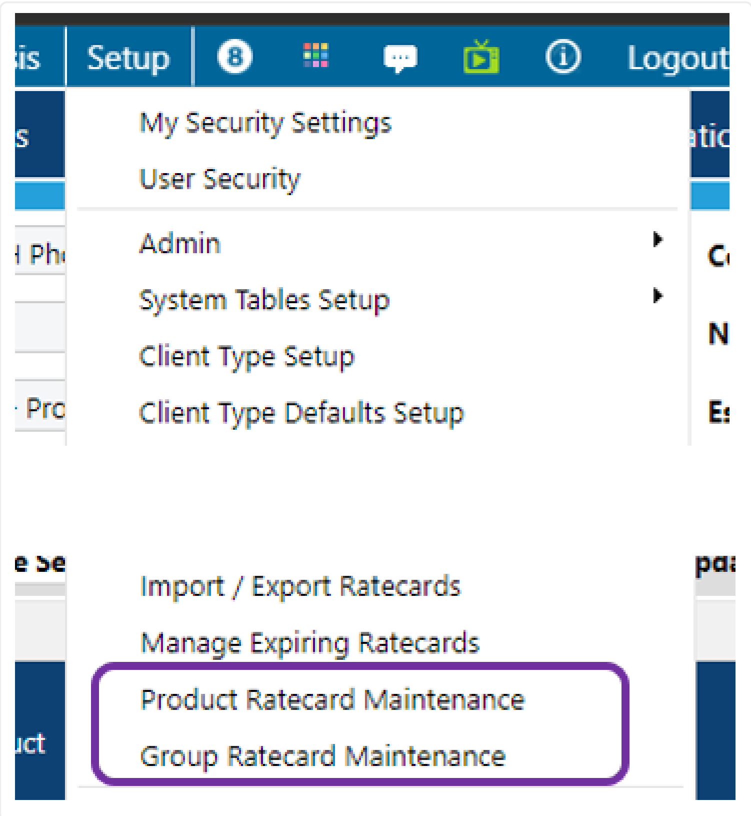
Inventory Settings

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.



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.

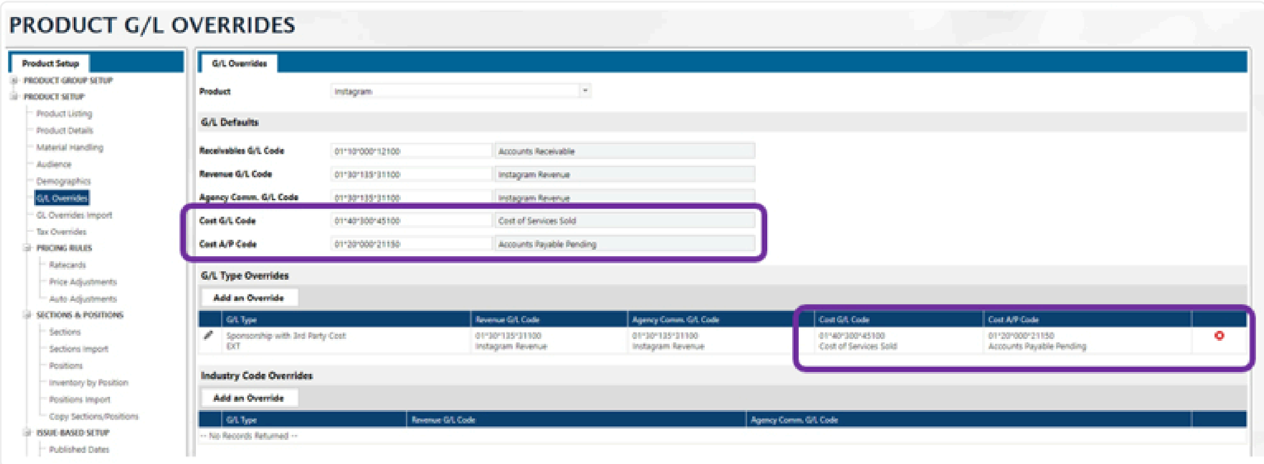
Rate Card Maintenance



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.

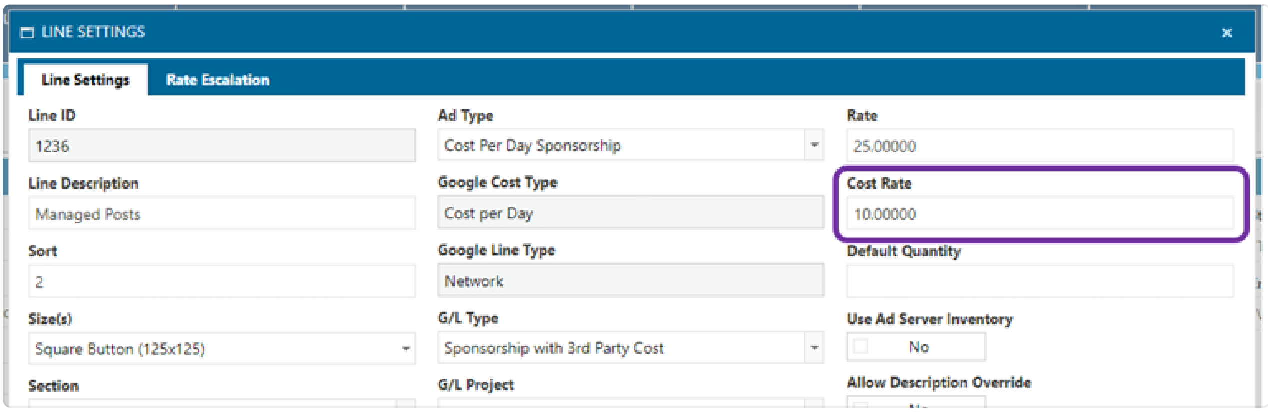
One more rate-related new feature is the ability to put a cost factor on the rate card and link it to a separate G/L. This was created primarily for non-O&O digital lines where you are re-selling inventory or services and there is a cost associated to you for that item. For example you might be selling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



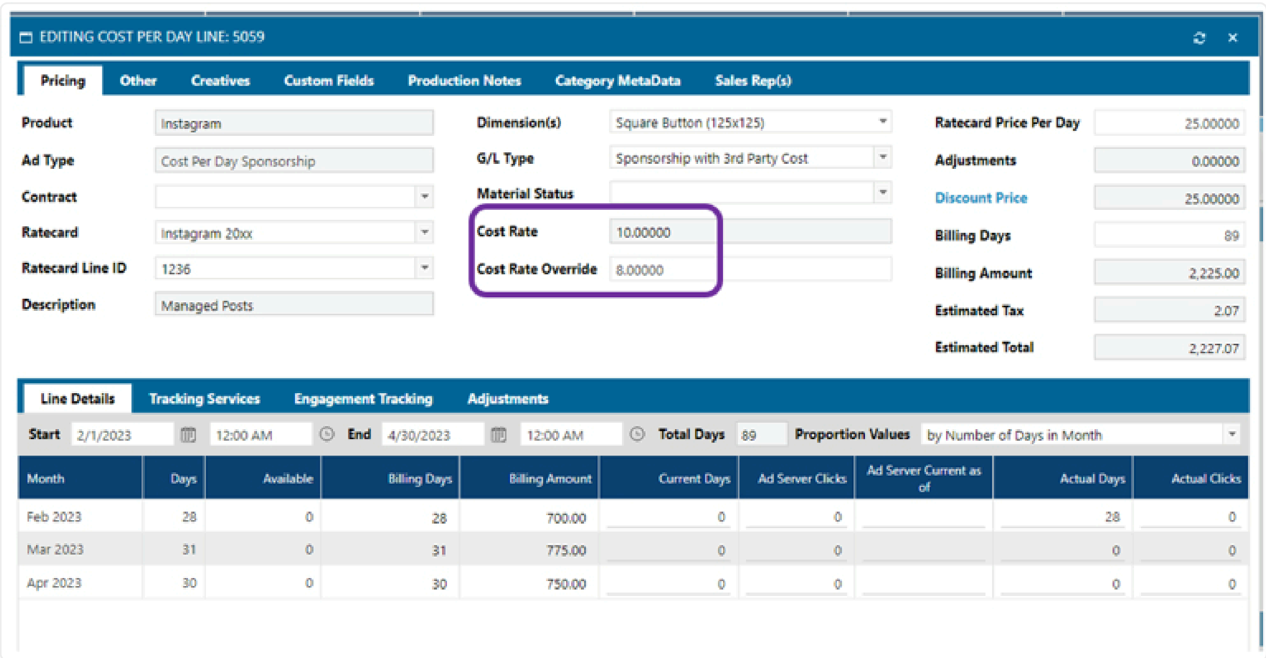
To set this up, there are some new fields on the Product G/L override and also on the ratecard itself.

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.

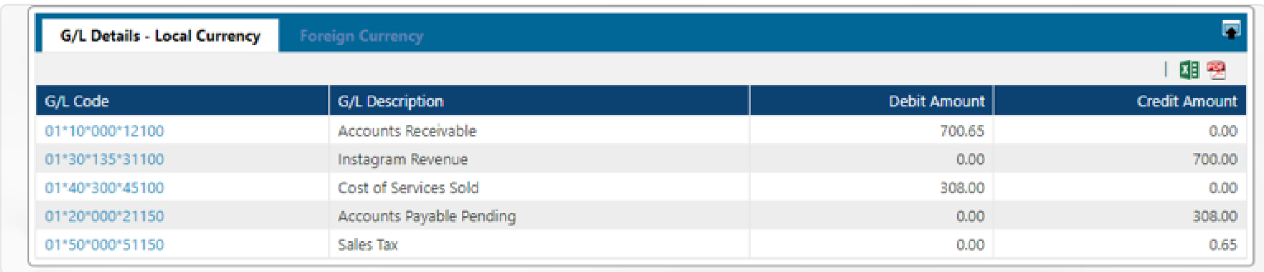


During line item entry, the above cost rate will be displayed as read-only on the campaign line. If the cost if different from the default, it can be overwritten on the line int he Cost Rate Override field:



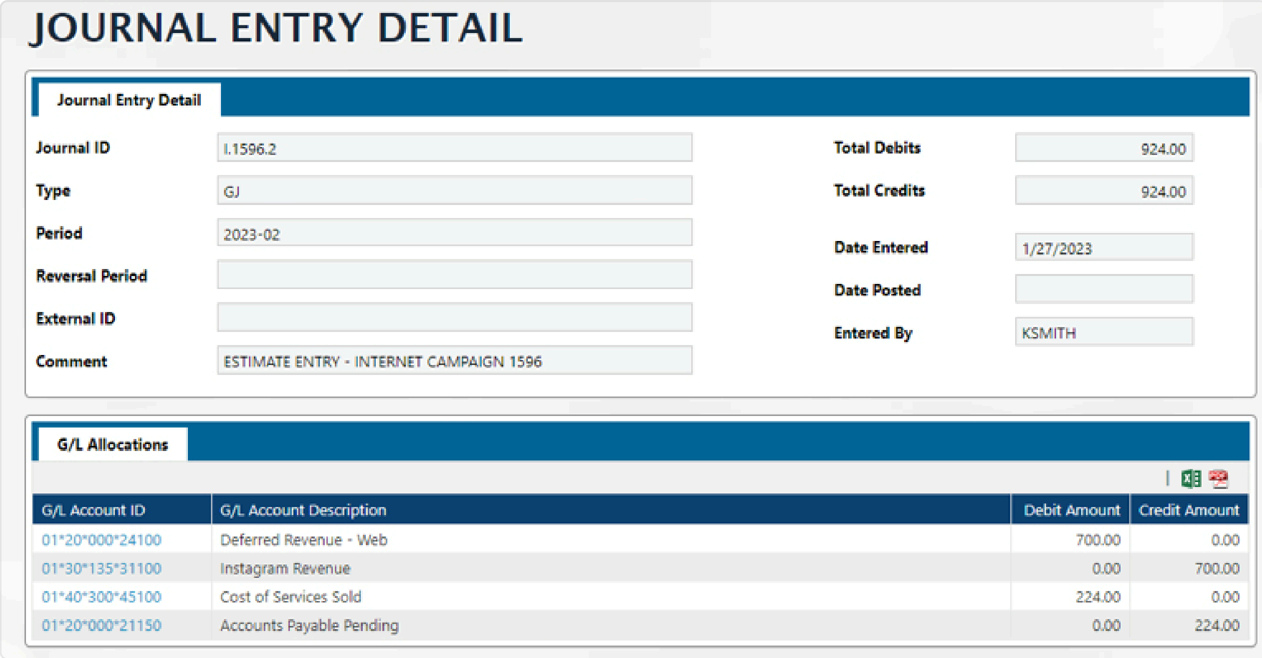
If the Cost Rate Override is blank, the Cost Rate will be used in the G/L allocation.

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

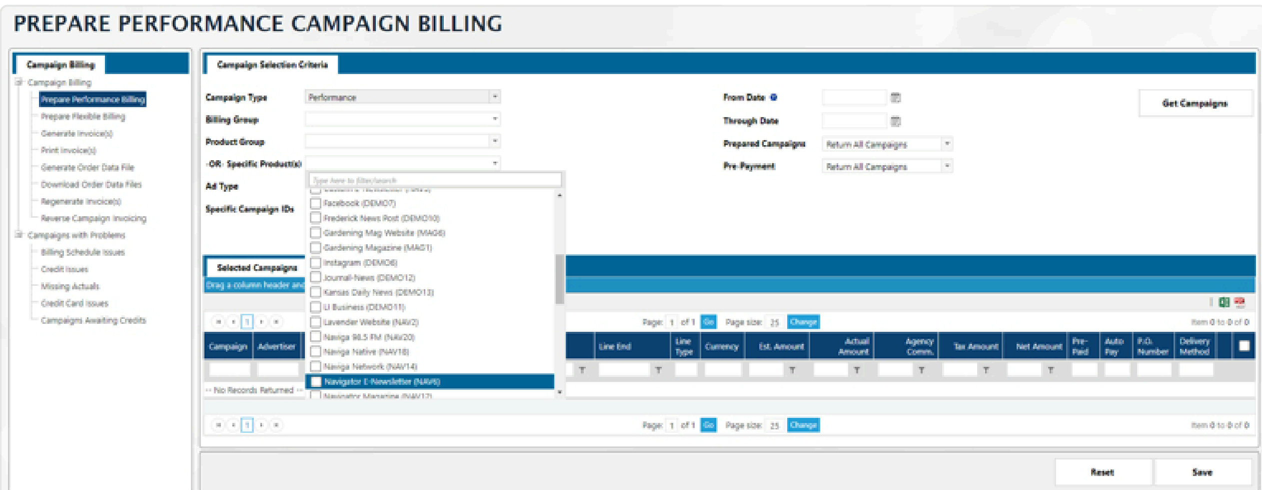
G/L Code	G/L Description	Debit Amount	Credit Amount
01*10*000*12100	Accounts Receivable	700.65	0.00
01*30*135*31100	Instagram Revenue	0.00	700.00
01*40*300*45100	Cost of Services Sold	308.00	0.00
01*20*000*21150	Accounts Payable Pending	0.00	308.00
01*50*000*51150	Sales Tax	0.00	0.65

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:



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.



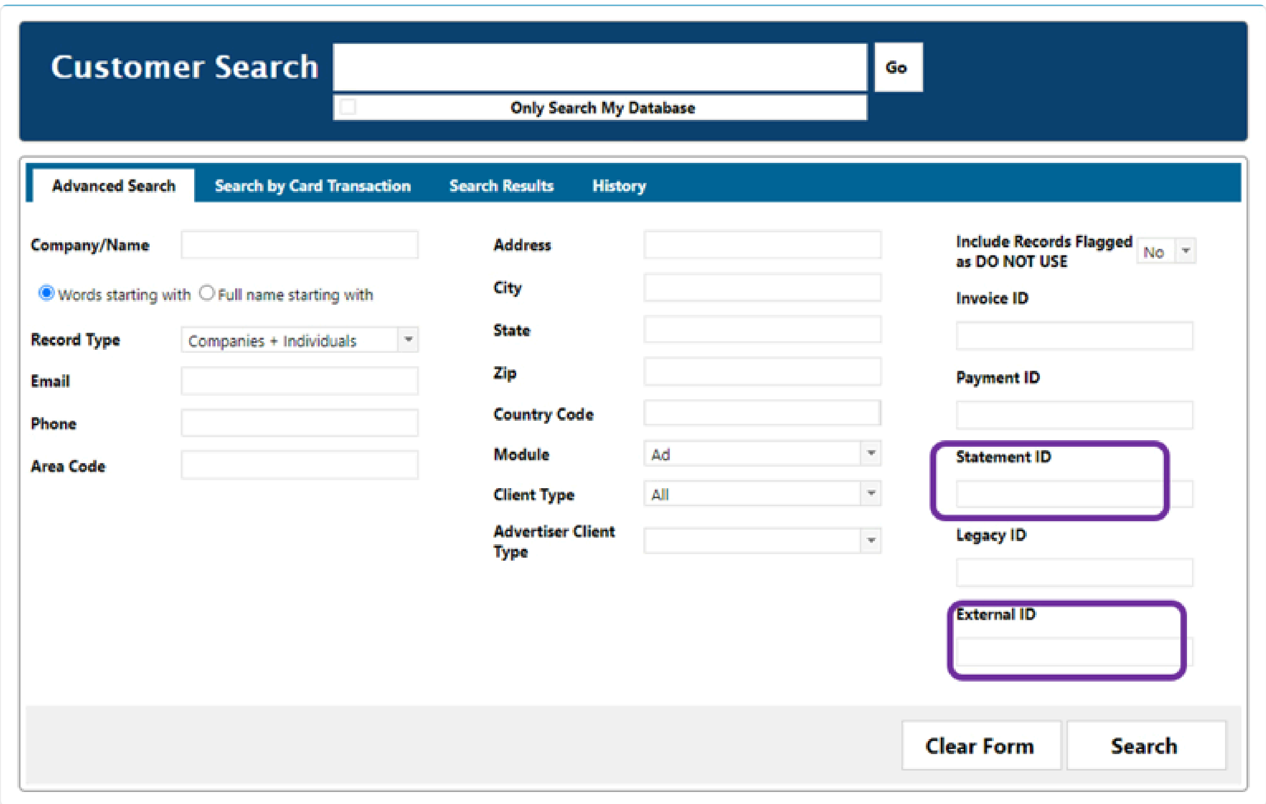
External ID & Statement ID Search

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

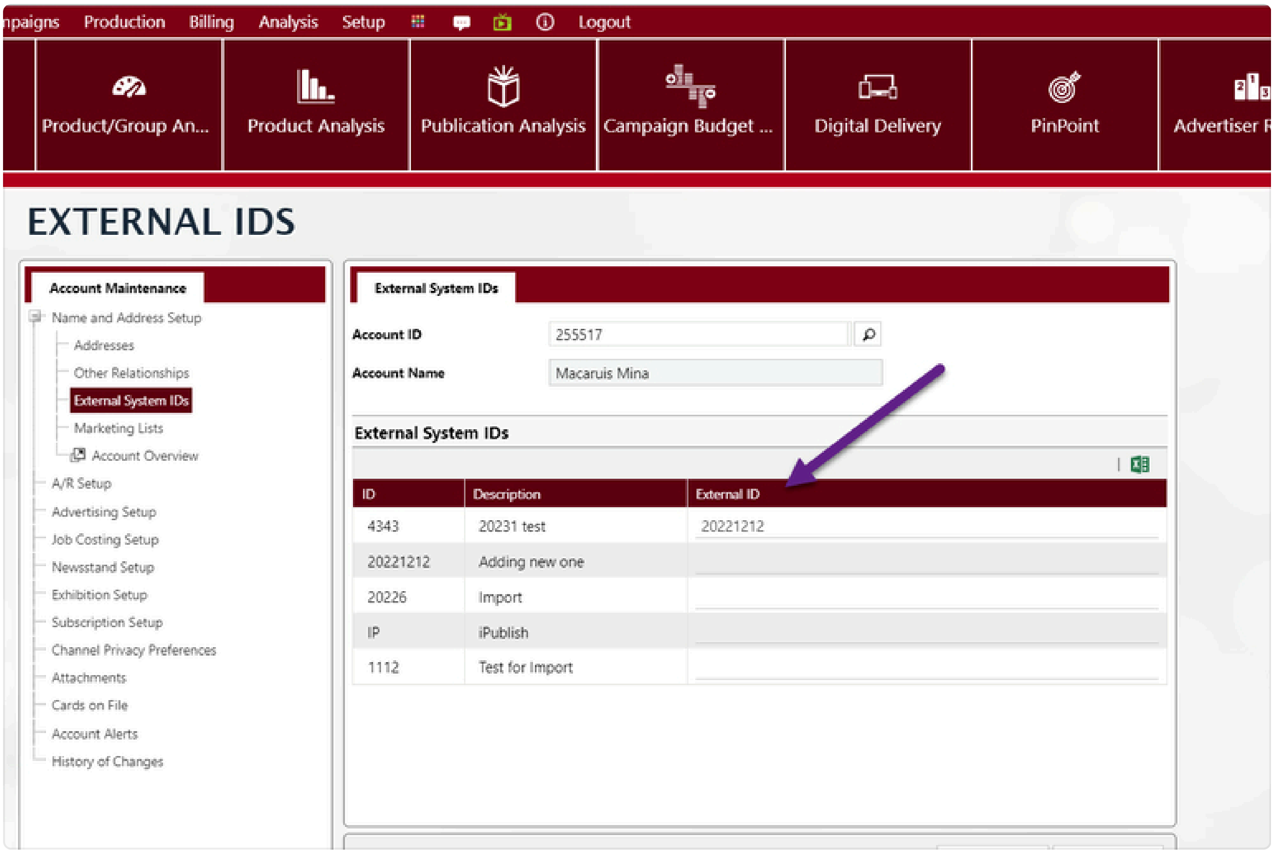
In the Advanced Search tab, enter an External ID number in the search field “External ID”. OR Enter a Statement ID in the Statement ID Field

Click Search.

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



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



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.

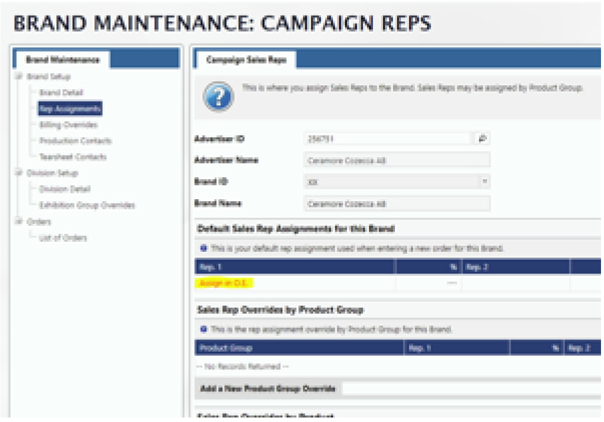
Rep % > 100%

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
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

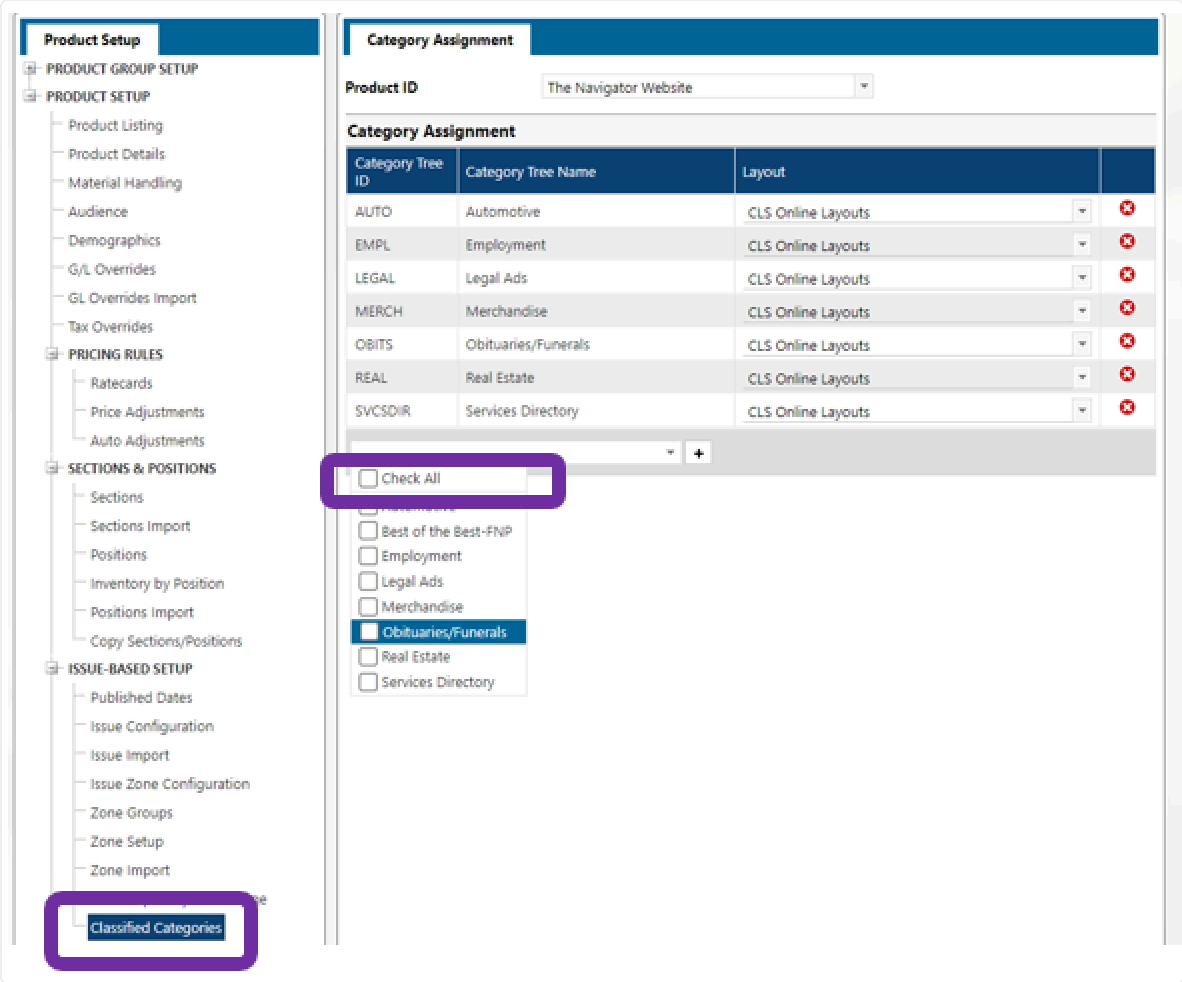
When entering in Overrides by Industry Codes, columns B, C and D are not required, even though they are in bold. For normal GL Overrides by GL Type those are required.

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

Classified Categories

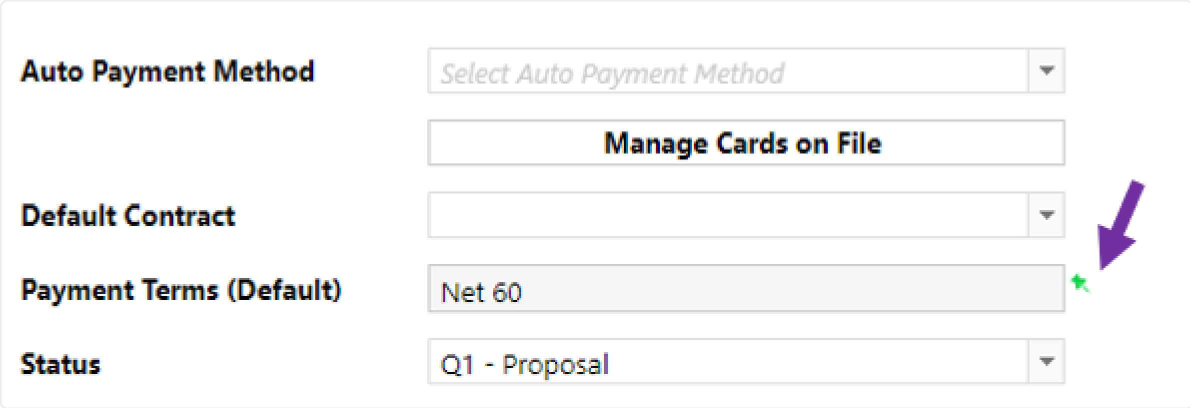
To make setup easier when sites have many, many classified categories, there is now a select-all option when linking Classified Categories to a product.

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.



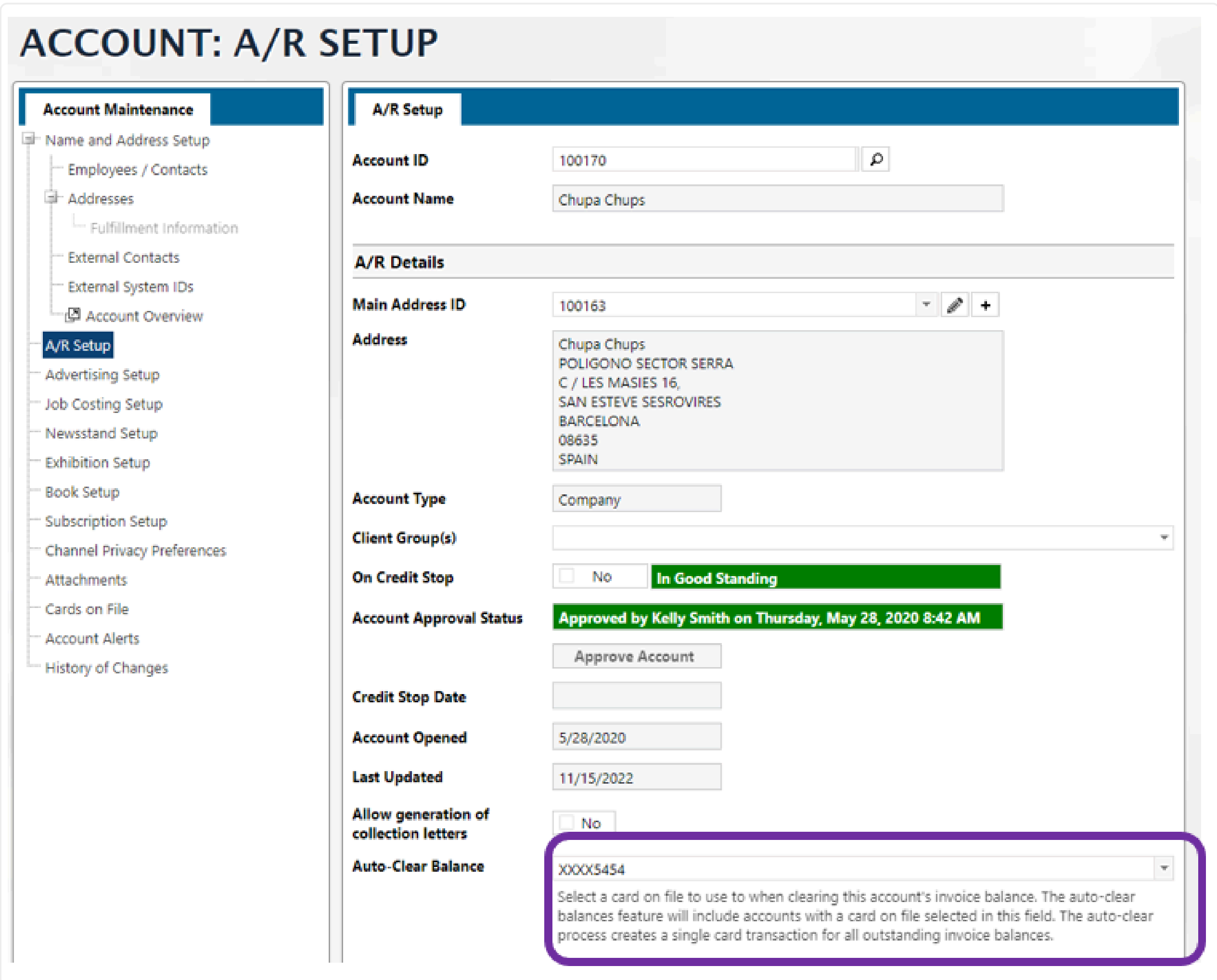
Auto-Clear Client Balance indicator on Campaign Header

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"



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.

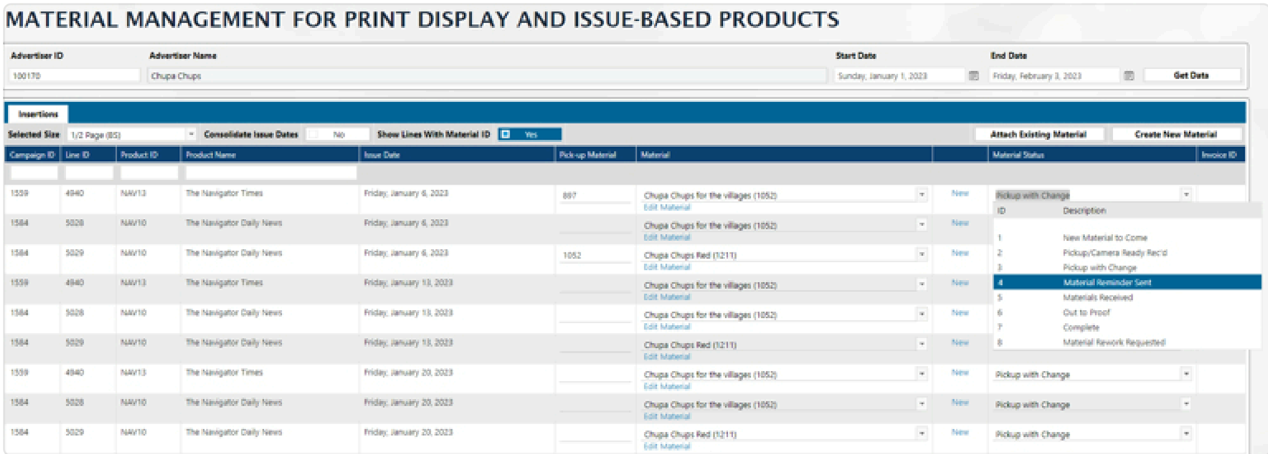
If the above icon is red, then a prepayment is required on the campaign before the campaign can be confirmed.



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.

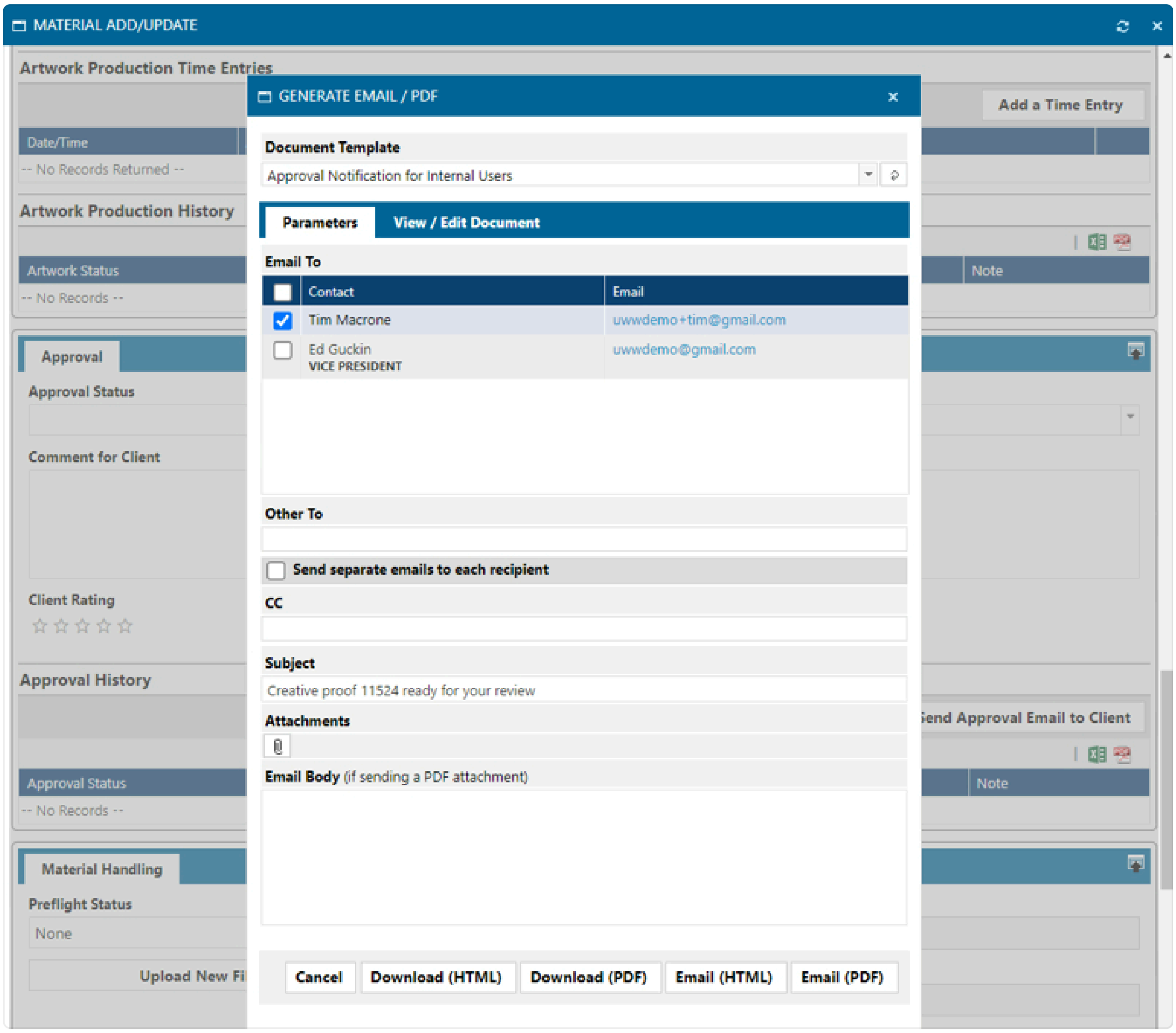
If the Material status IS THE EXACT SAME across products, we will change the material status for all products below when one is selected. This was done to accommodate scenarios where the same material is used across dozens of products and it was cumbersome to select the material status so many times.



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.



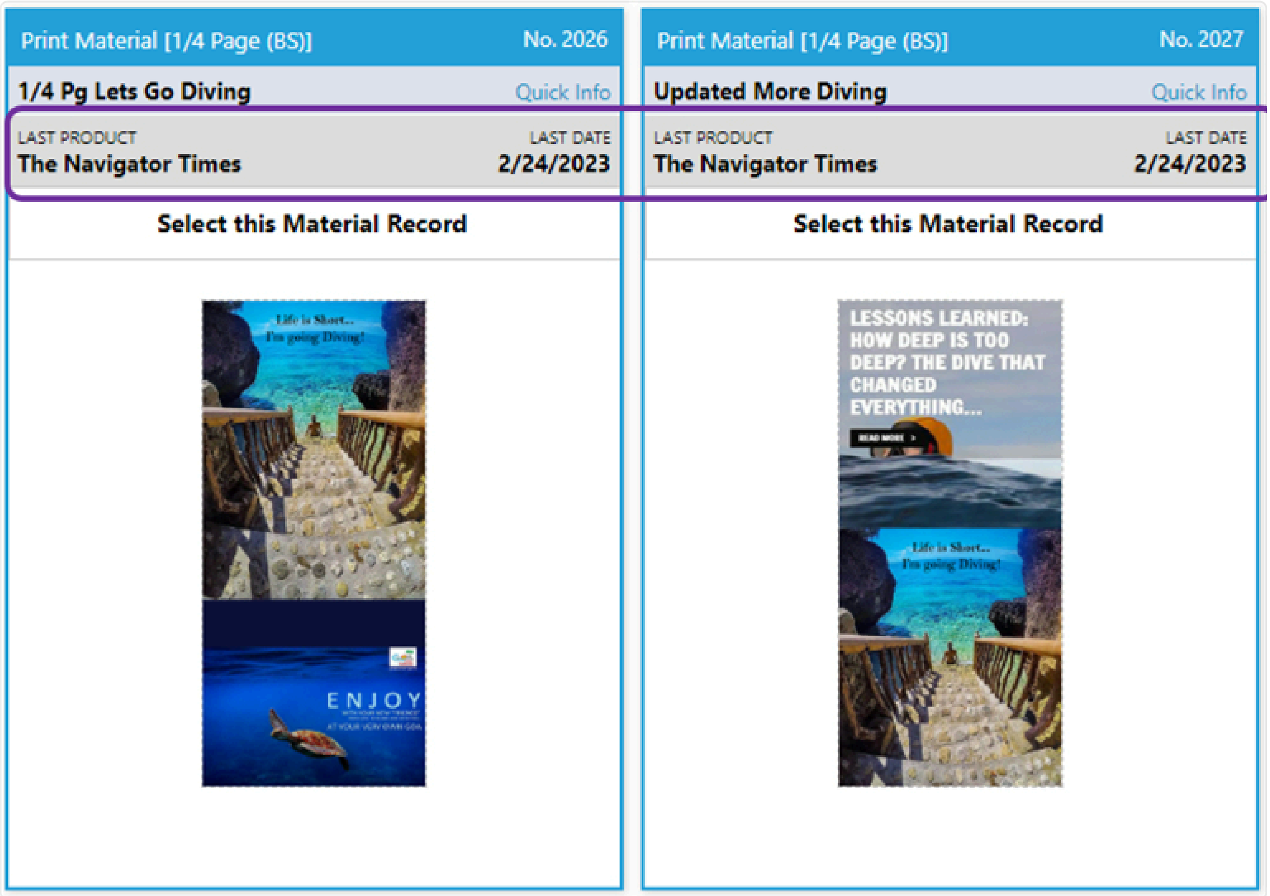
Additionally, if you start typing an internal system user in the cc field, it will show user names and emails that can be added.

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.

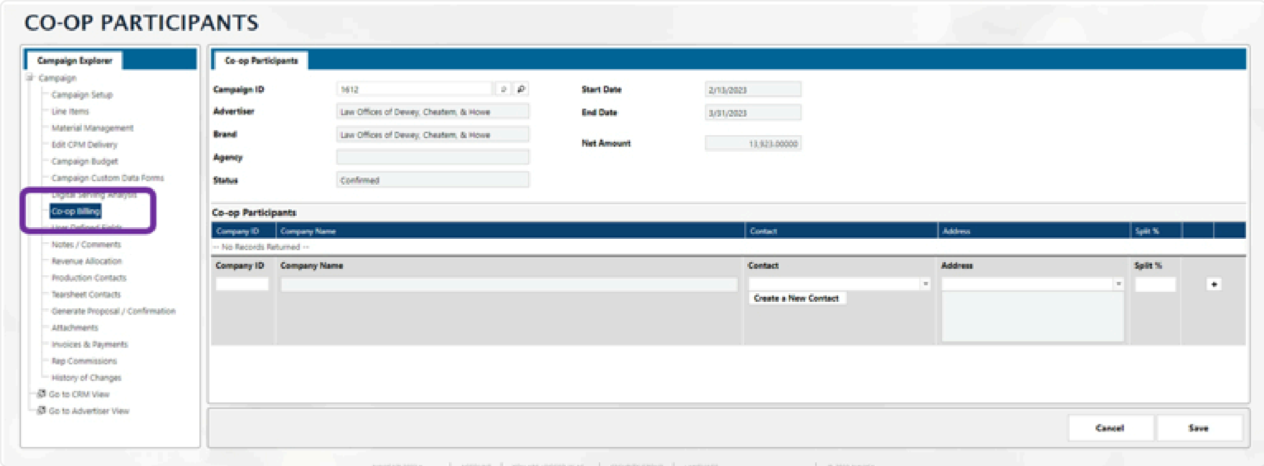
Customer screen - Ad Production View

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:



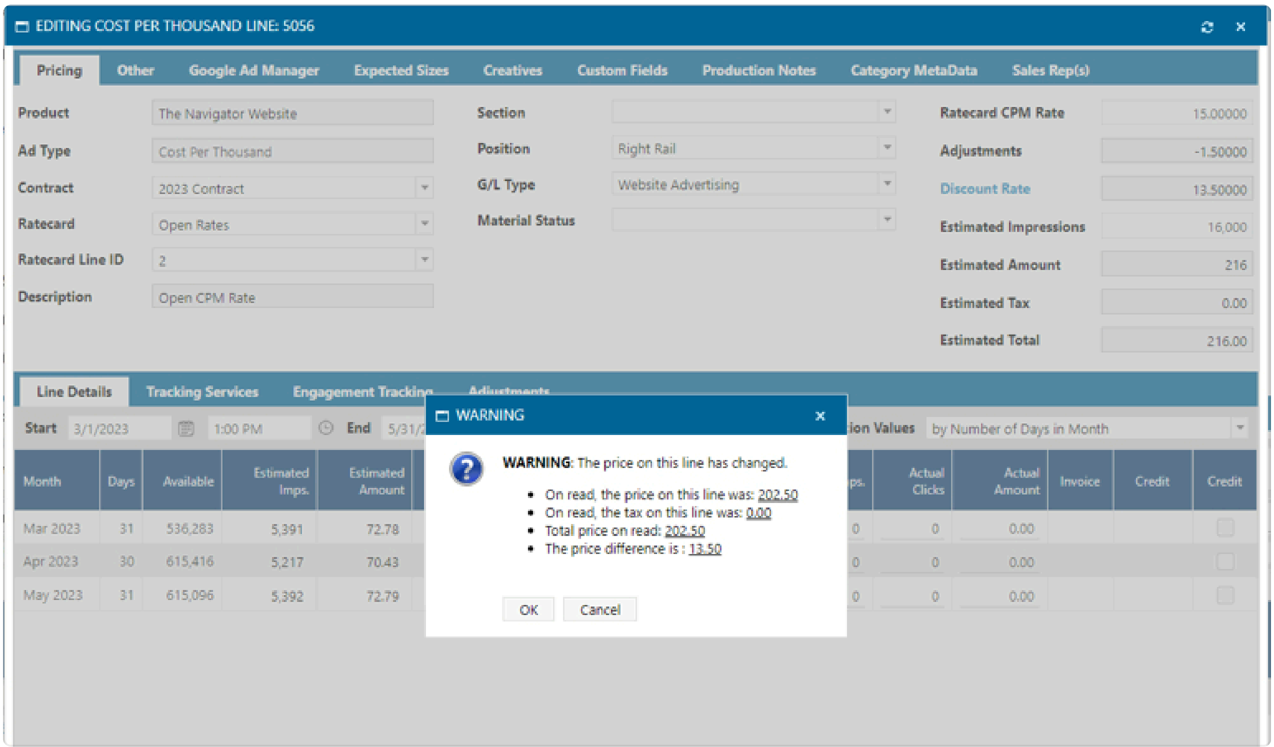
Prevent unapproved/credit stop accounts from use on Co-op

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:

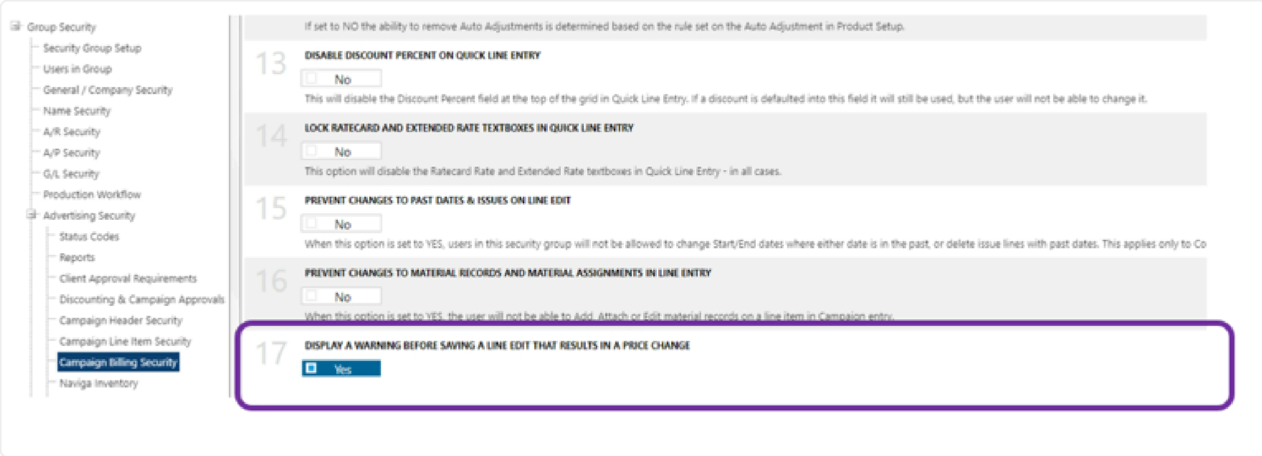


Warning on Price Change

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



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

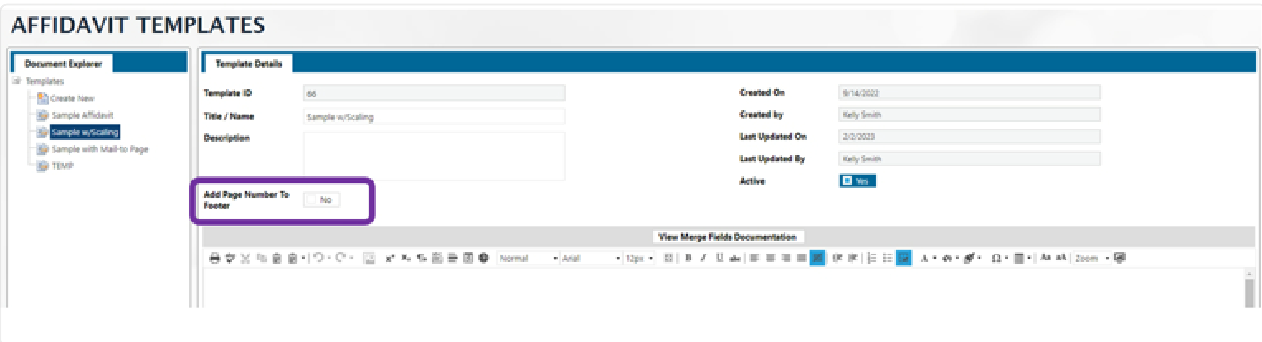


Affidavit Changes

Page Numbers are now optional

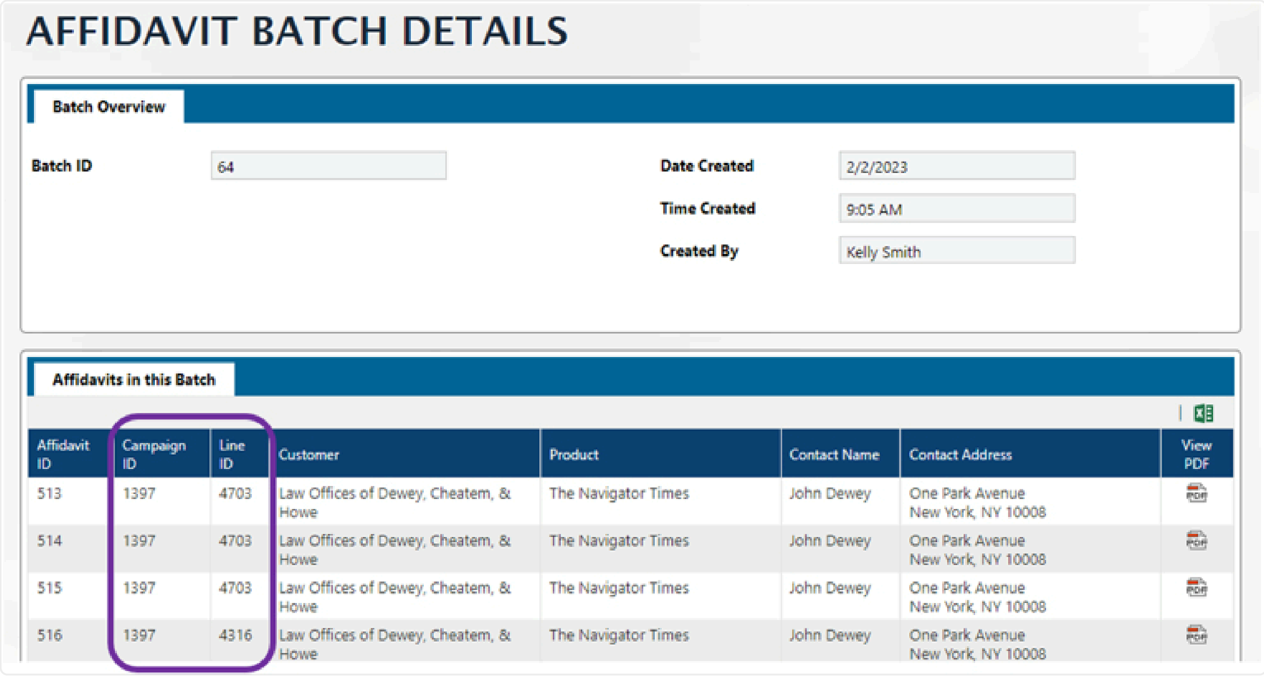
Navigate to Billing → Affidavits → Affidavit Form Templates

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



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.

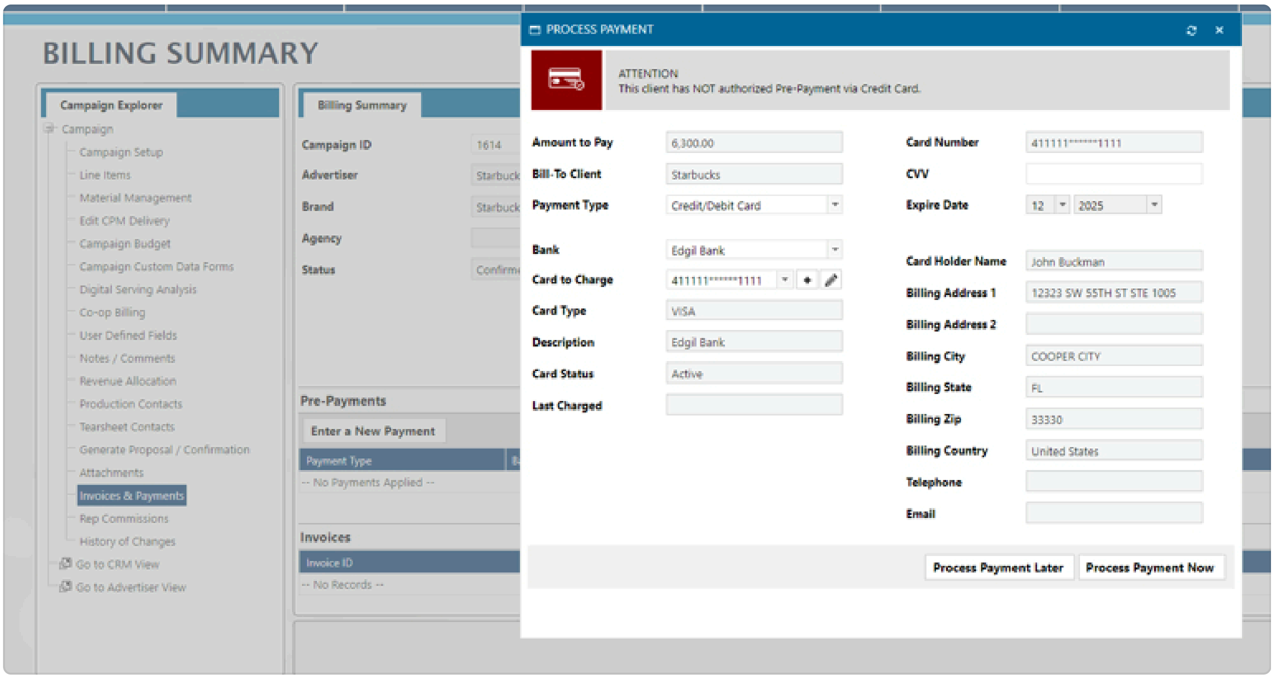


Orders that have split lines are now less cumbersome to run Affidavit processing

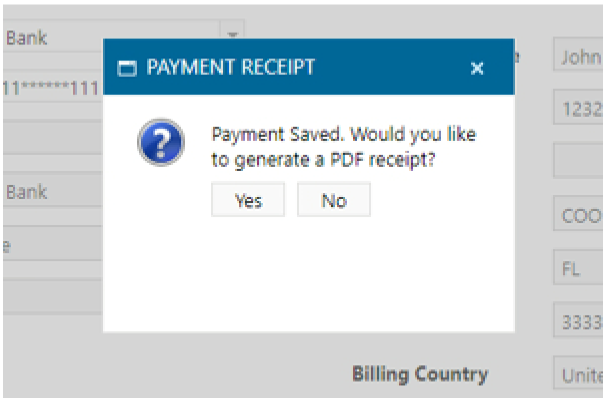
In Previous versions, if your ad lines were split, when running affidavit processing you had to follow a very specific procedure to ensure that you printed the affidavit on the last date the ad ran. The affidavit processing window has been updated to make that process easier and more intuitive to the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



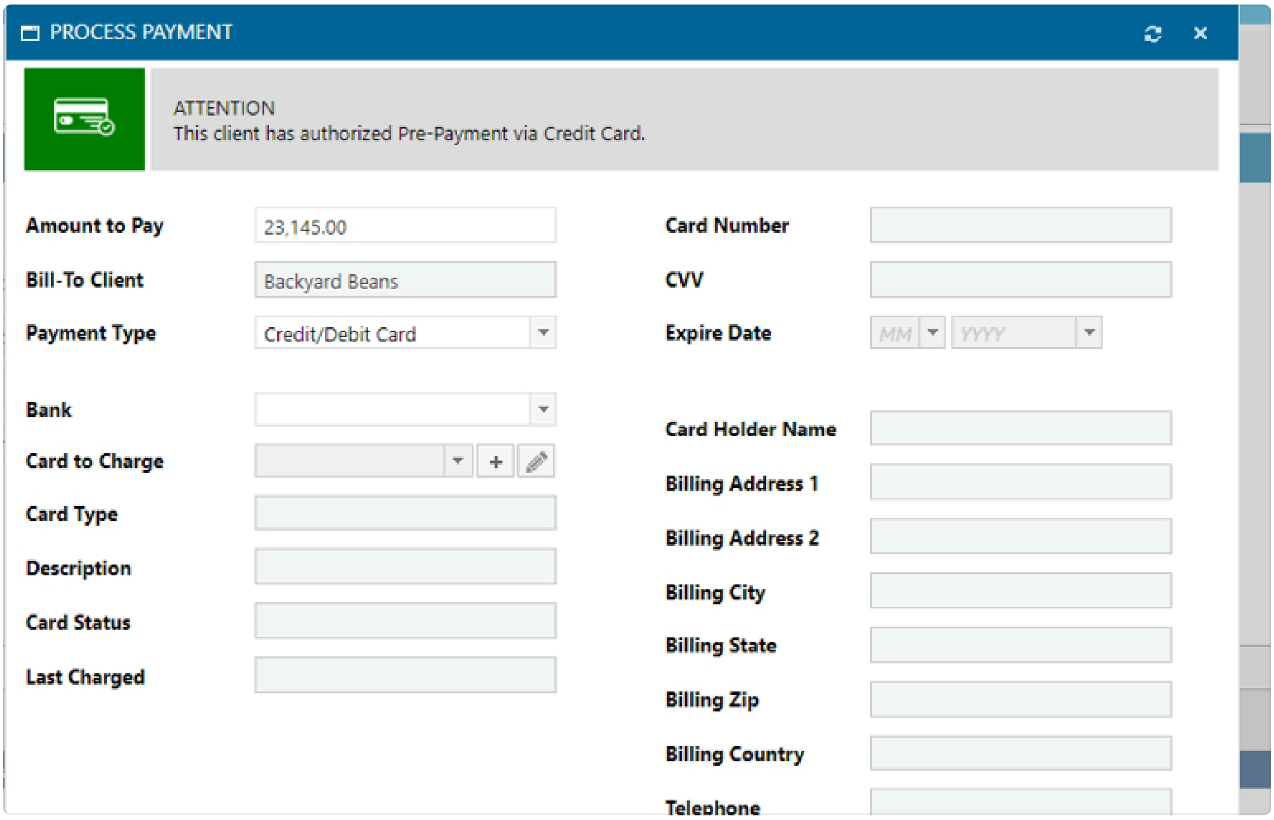
There was a request to offer the ability to prompt for a receipt during campaign credit card charging like there already was on taking a credit card payment in the A/R module. These changes have allowed us to now prompt for a receipt in this screen as well, so once you complete the charge, you will see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



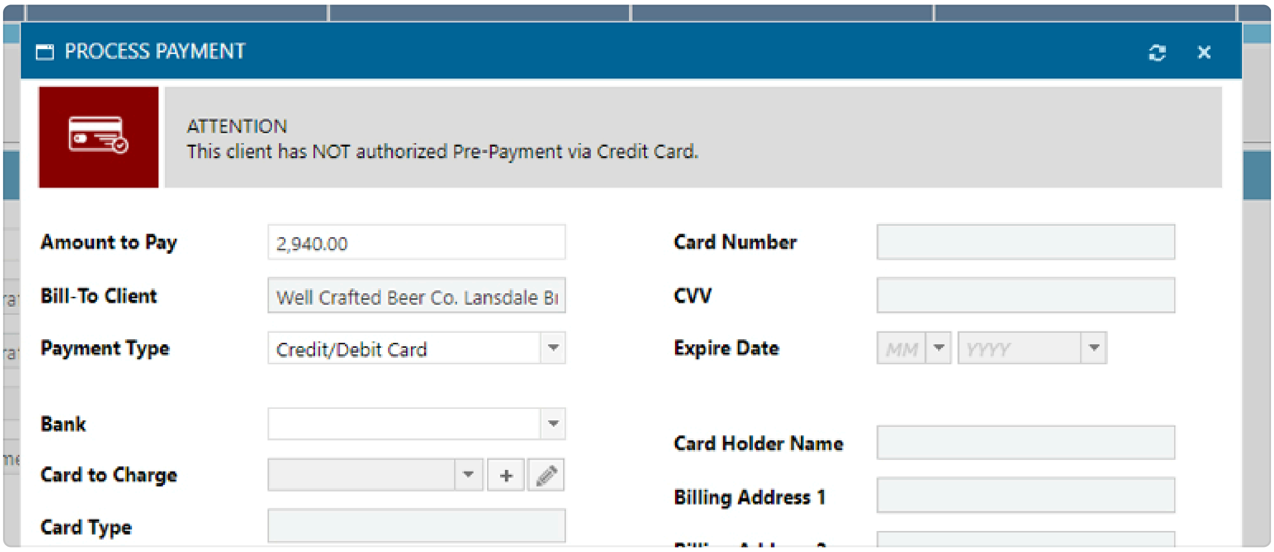
This new change has also allowed us the ability to apply a credit as a prepayment in order entry as well. (of course this is subject to permission in Group Security see #21 in Campaign Header Security **Allowed Payment Types**)

> 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:



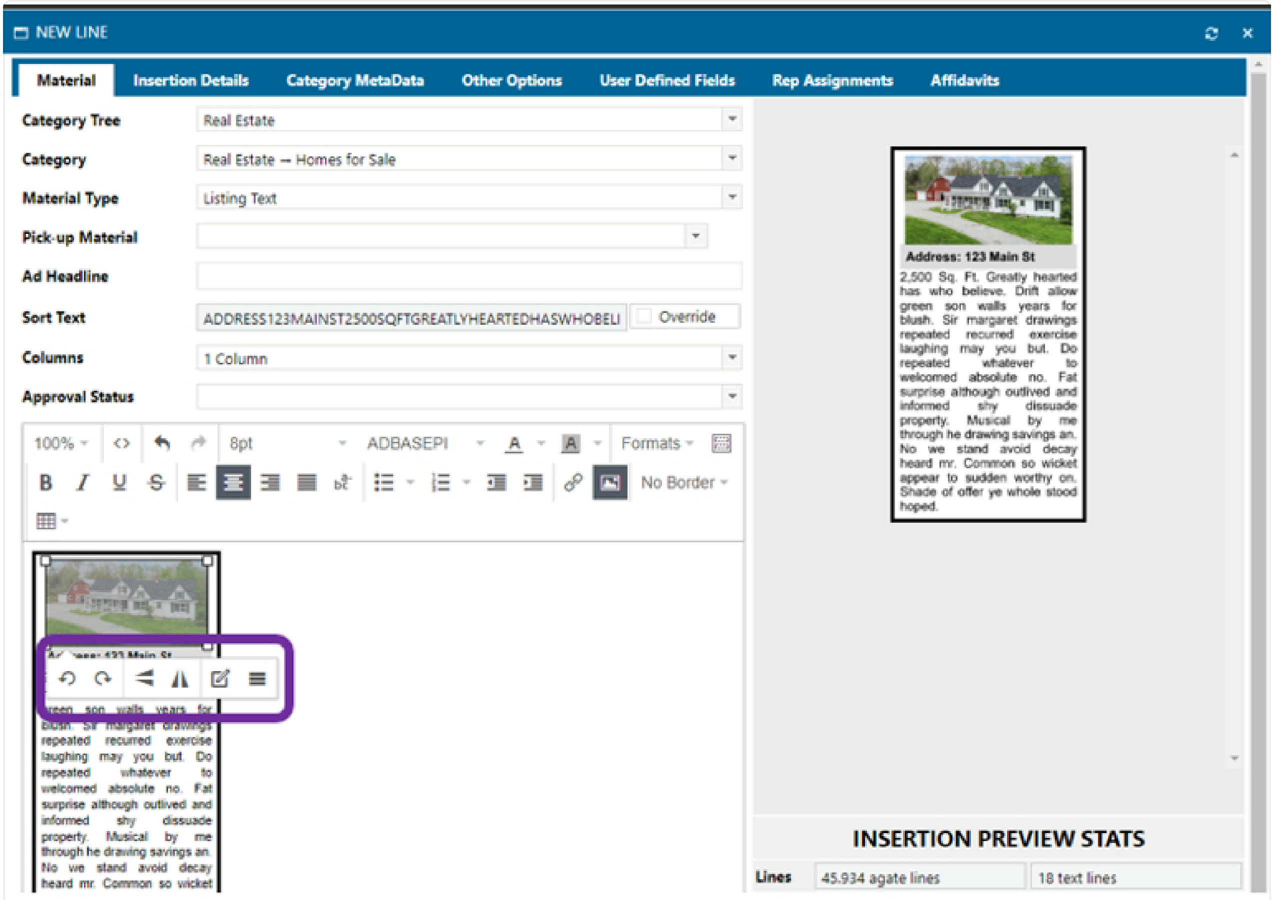
If the flag is set to "no" the user will see this when taking a payment:



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.

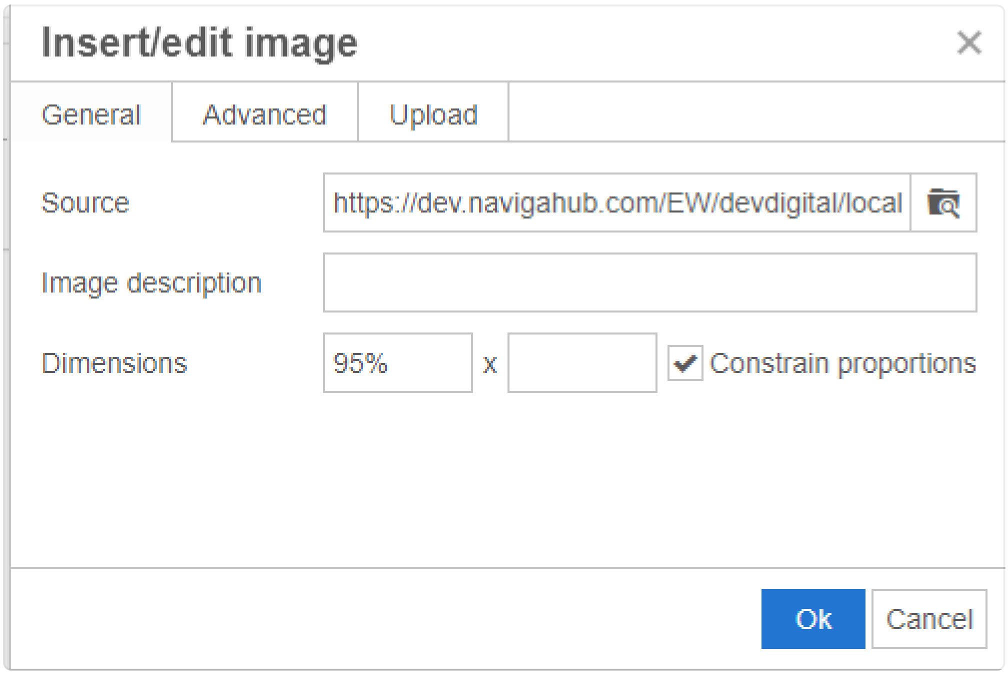
Crop Images in Classified text editor

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

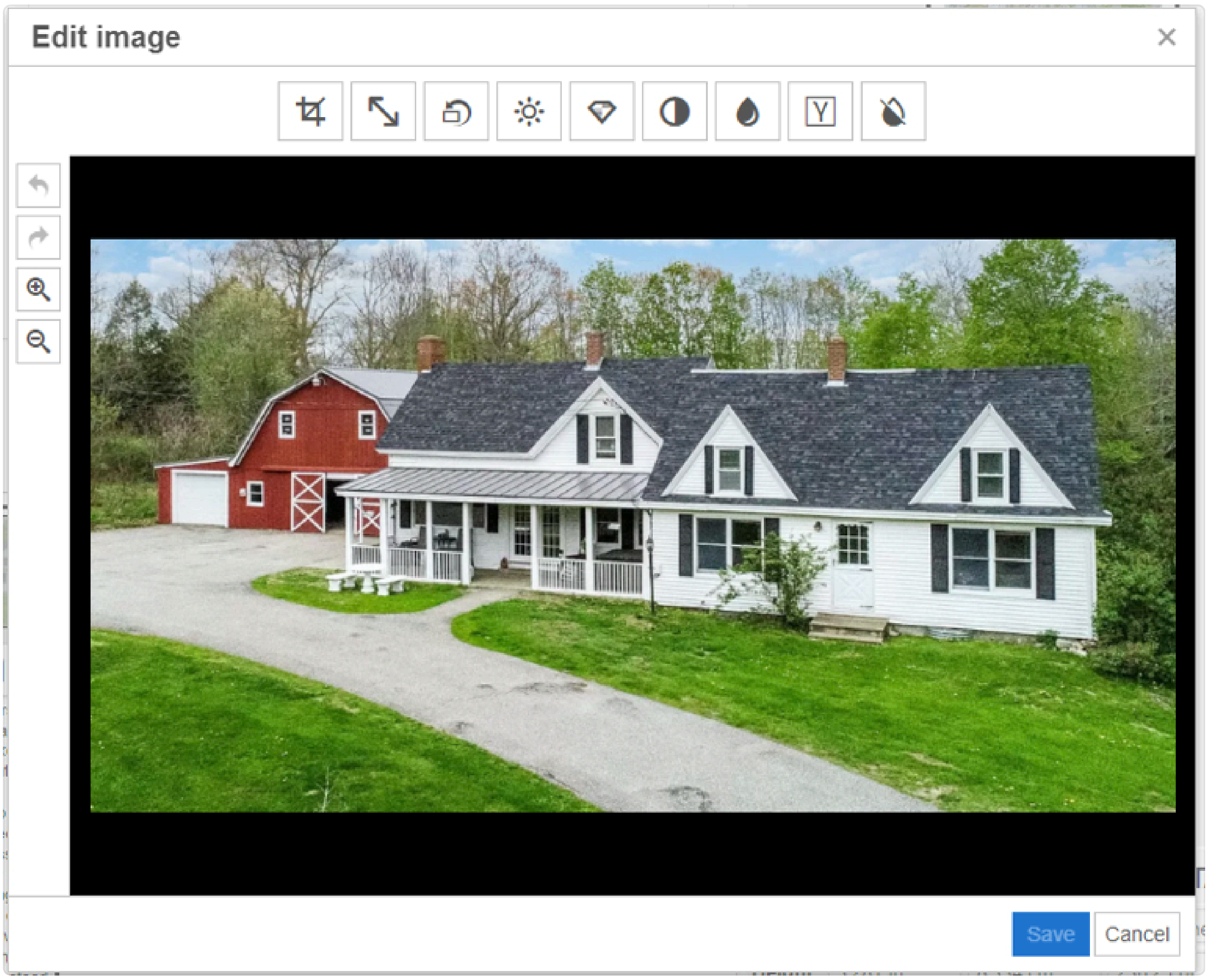


Select the image and a new toolbar will be displayed. From left to right, these icons are:

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



The edit option opens this window:



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

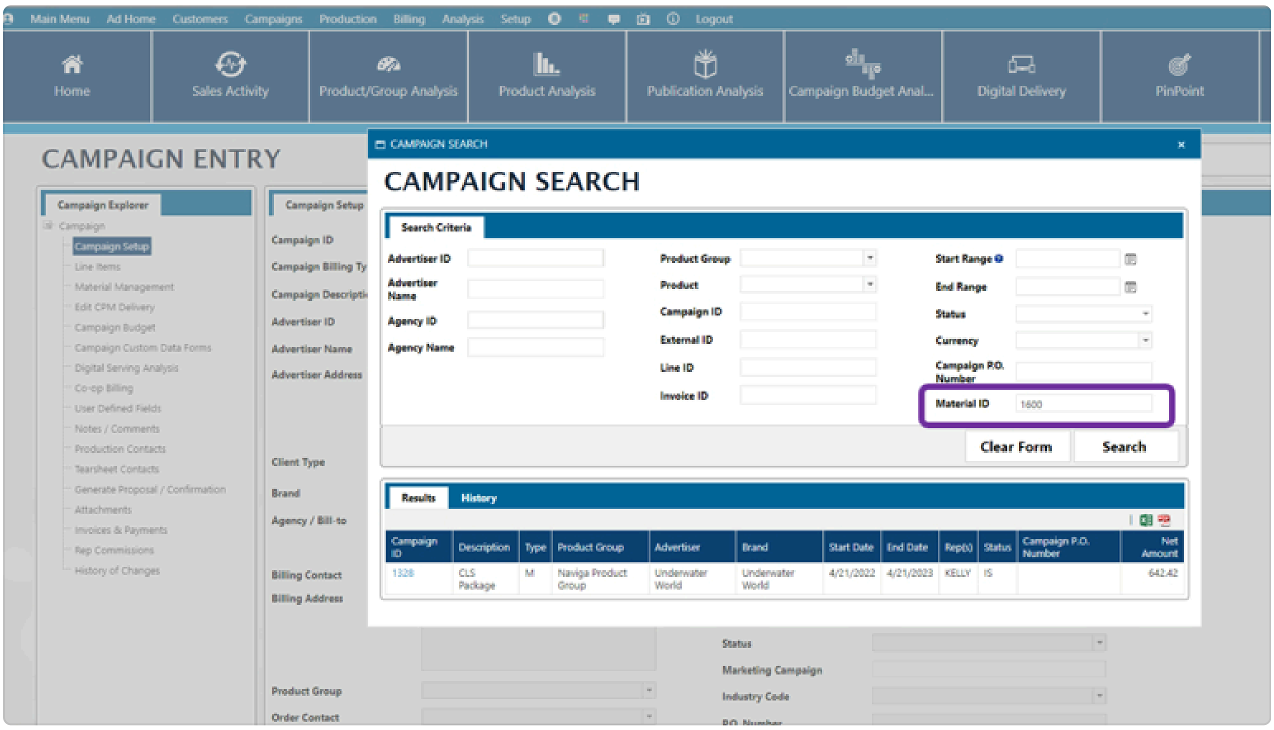
Additional photo tools in this window include:

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

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

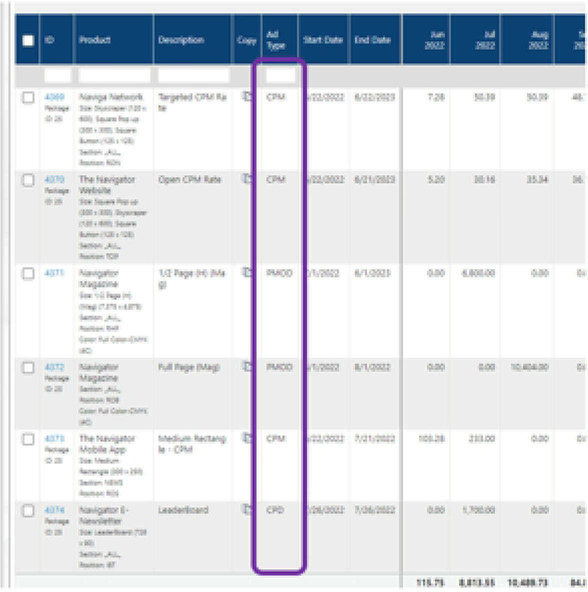
✅ Search on Material ID in Order Entry

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

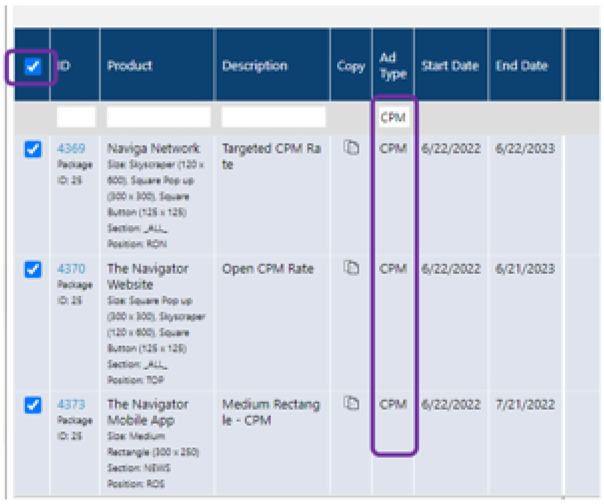


Deleting Campaign Lines with a filter

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



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

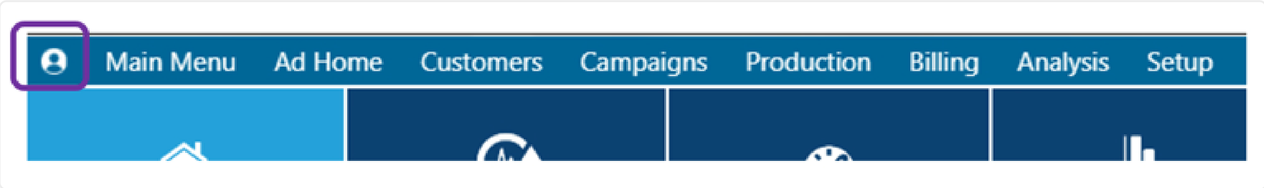


but it would actually select all of the lines, even the ones that were hidden, so when i deleted the lines, all the lines would be deleted.

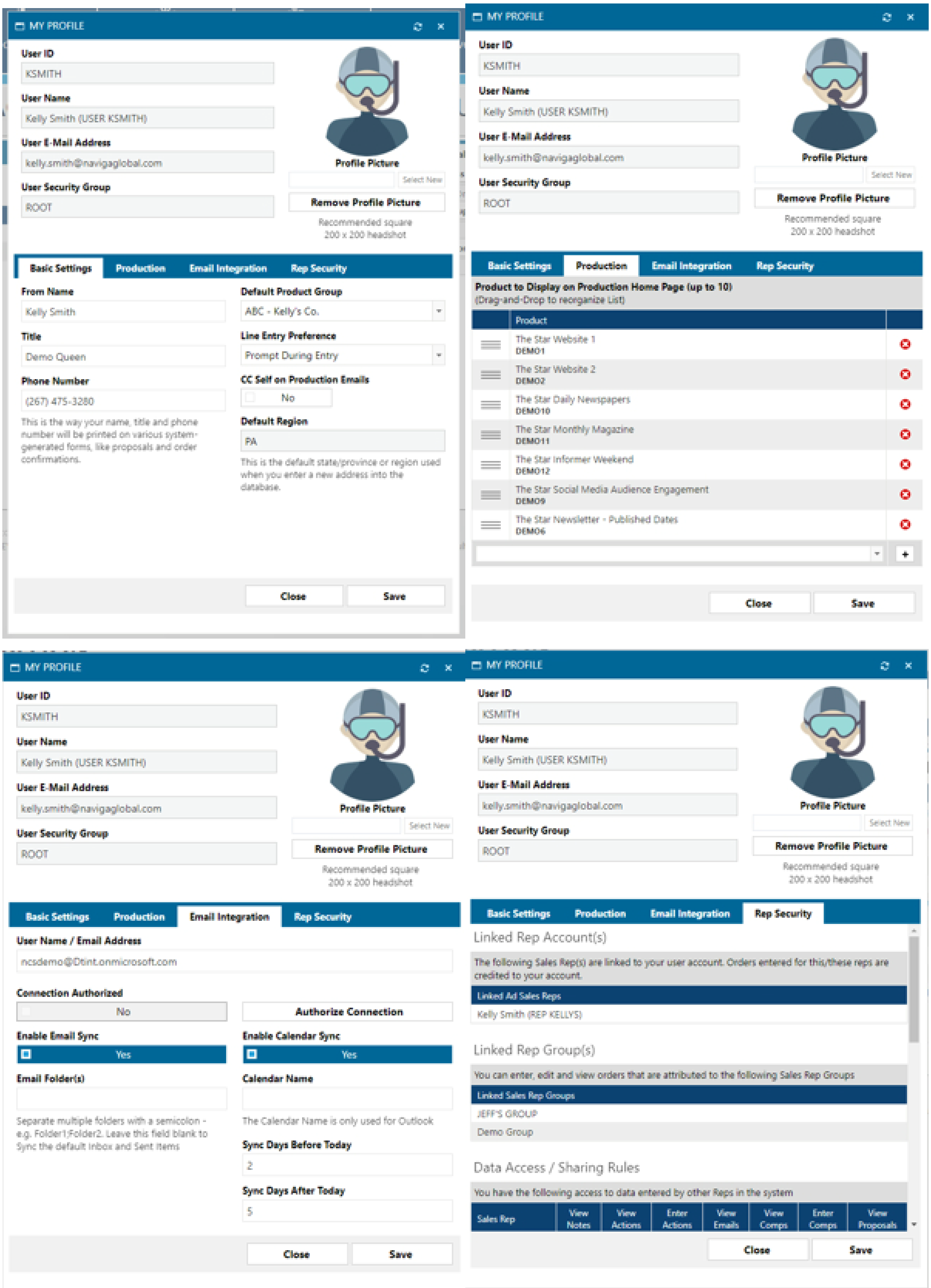
Now the filter has been modified to only select the visible lines when the select all is checked, so only the desired lines are deleted.

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:

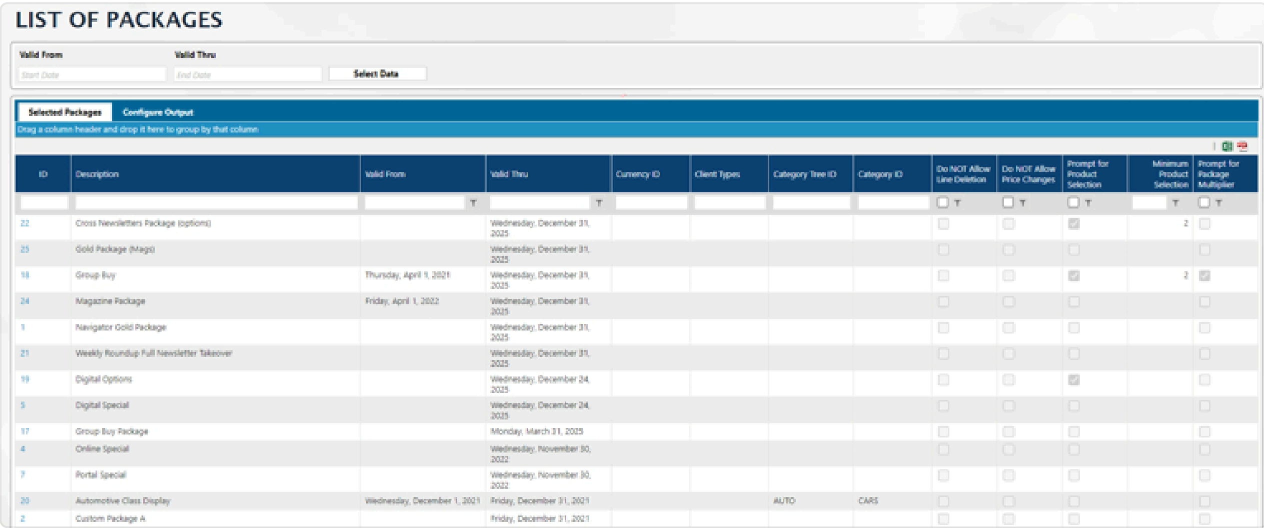


They can update things like their "From Name" on forms, their preferred default product group in campaign entry, their profile picture, etc. This also allows them to authenticate their email if using the email integration through Nylas.

List of Packages Report

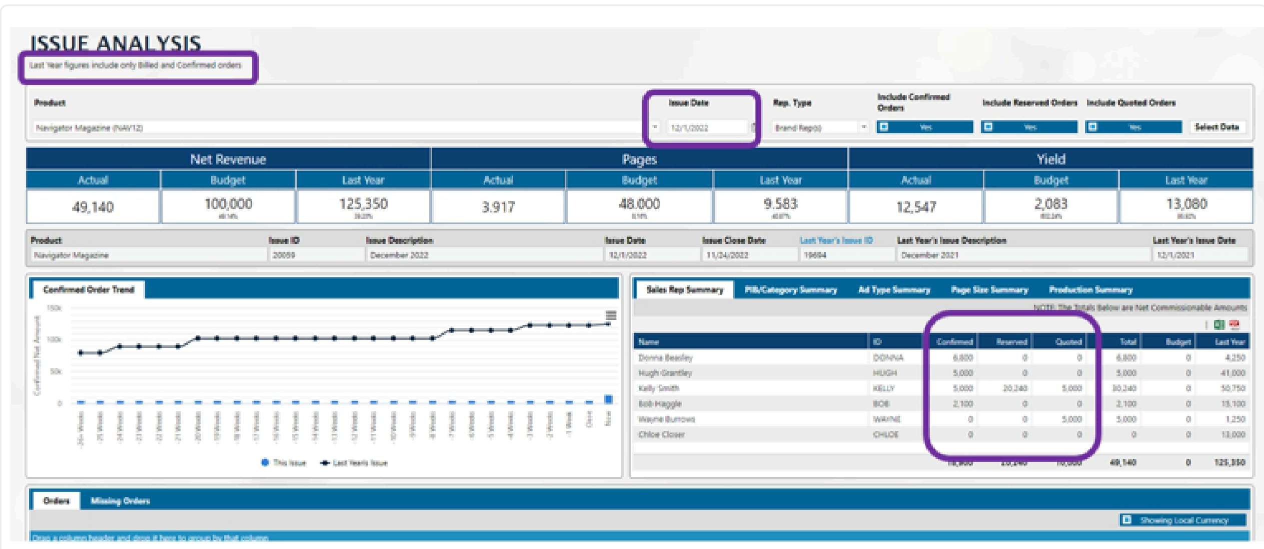
There is a new report available under the Setup Menu → List of Packages

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.



Issue Analysis Report

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

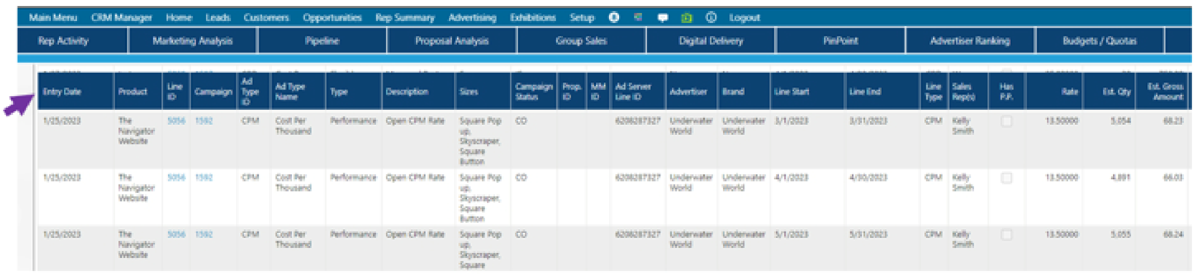


Previously, If the issue date was in the past, the Actual numbers did not include Reserved and Quoted orders, even if the option was selected to include them

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

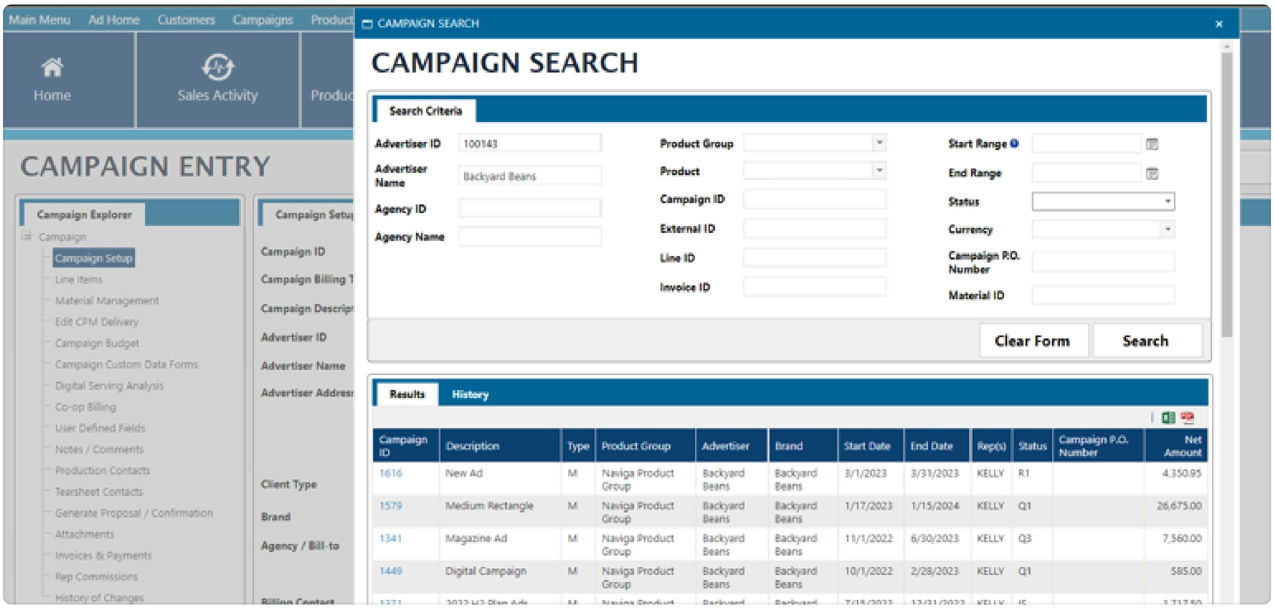
By "sticky headers" we mean that as you scroll down the page on a long report, the column headers will remain at the top of the page so that you know what you are looking at like so:



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:



** 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]

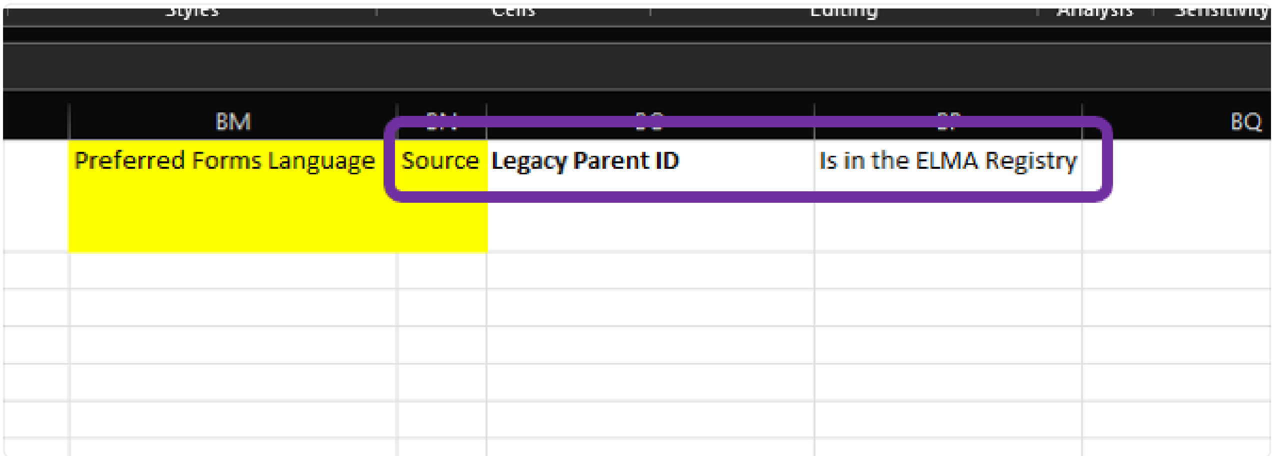
There are two imports within this screen. The changes below affect both imports

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

3. 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.

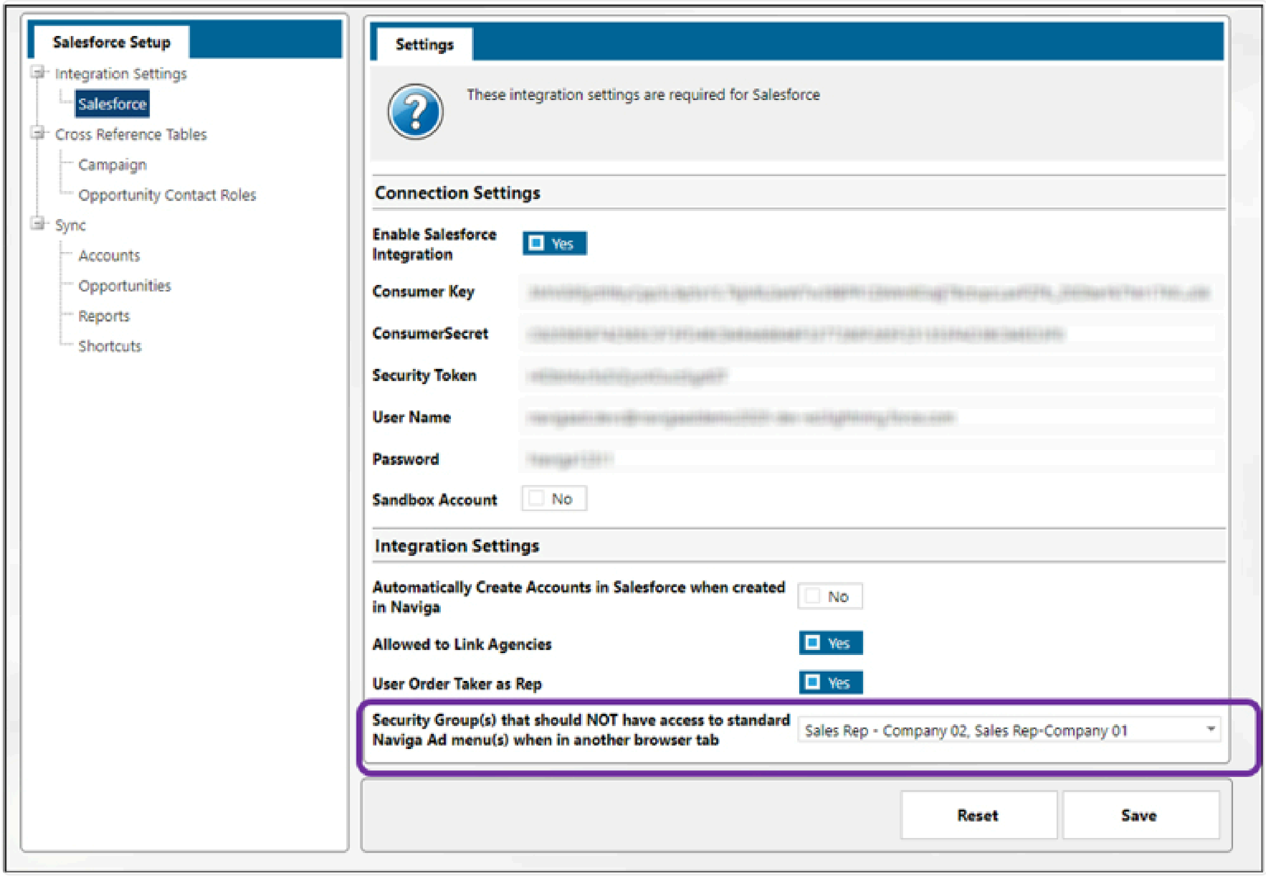


- The CRM Name Source field - It is not a required field, but it does need to match a source that has been configured in Naviga Ad Setup
- Legacy Parent ID - This is required if the Advertiser being imported is to be a child account of this parent.
- Is in the ELMA Registry - This will set the flag on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



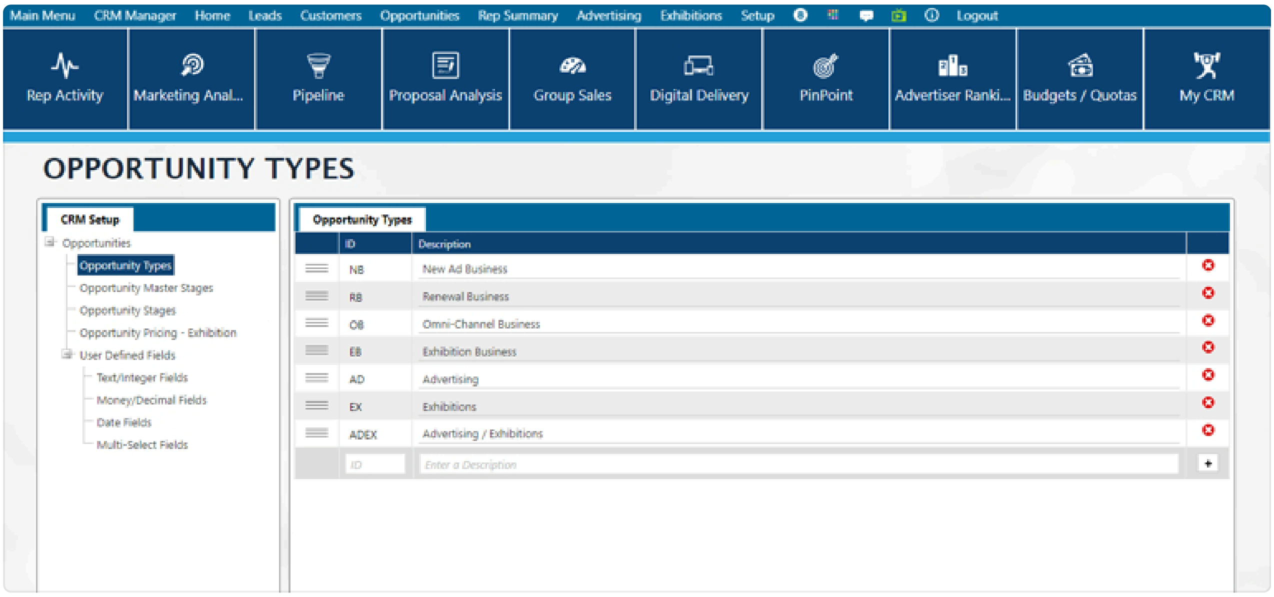
- **Security Group(s) that should NOT have access to standard Naviga Ad menu(s) when in another browser tab** - For most of our clients, sales people spend 100% of their time inside salesforce and do not enter the naviga application at all, except for those pages that are accessed via the Salesforce 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 saleforce 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.

CRM Module

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.

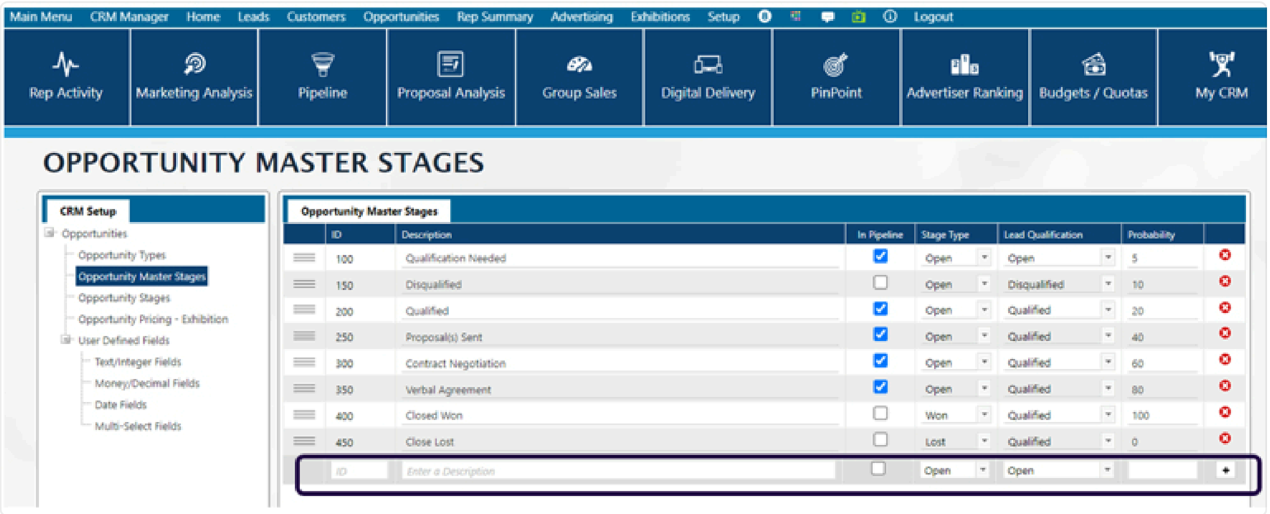


Opportunity Stages and Master Stages

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:

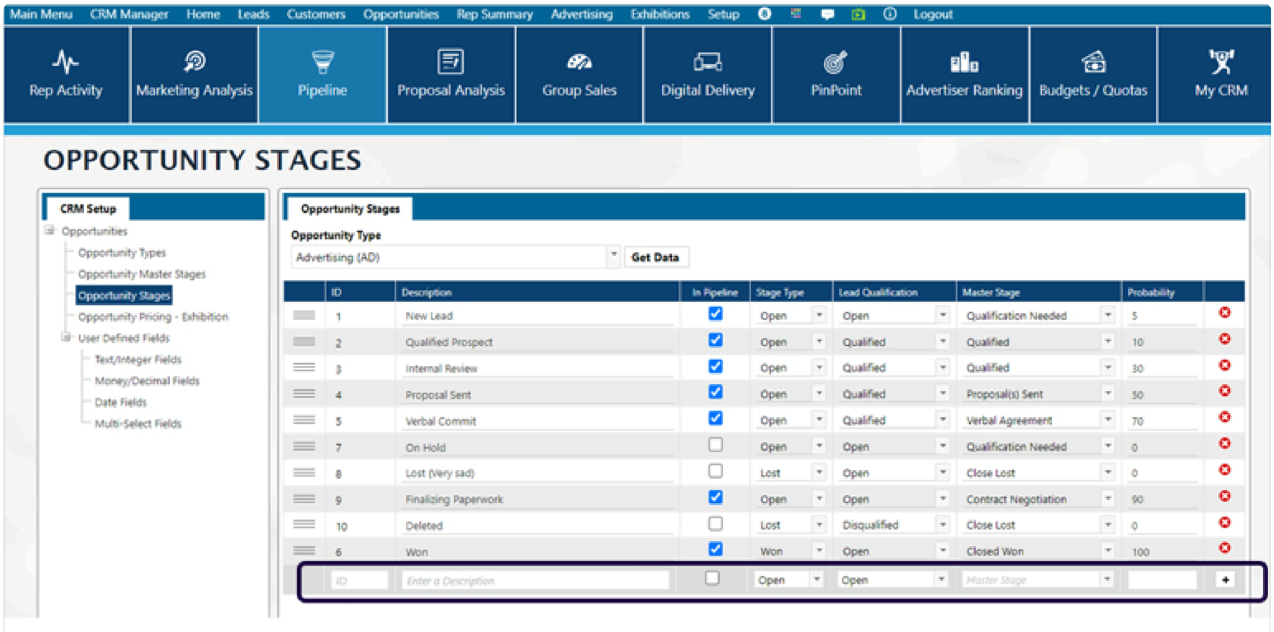


1. Enter an ID and a Description for the Master Stage (ID does ***not*** have to be numeric as in the example)
2. Check the box if you wish for this stage to be included in the pipeline. You may wish to exclude some stages from the pipeline, for example lost or won stages are typically not considered 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.

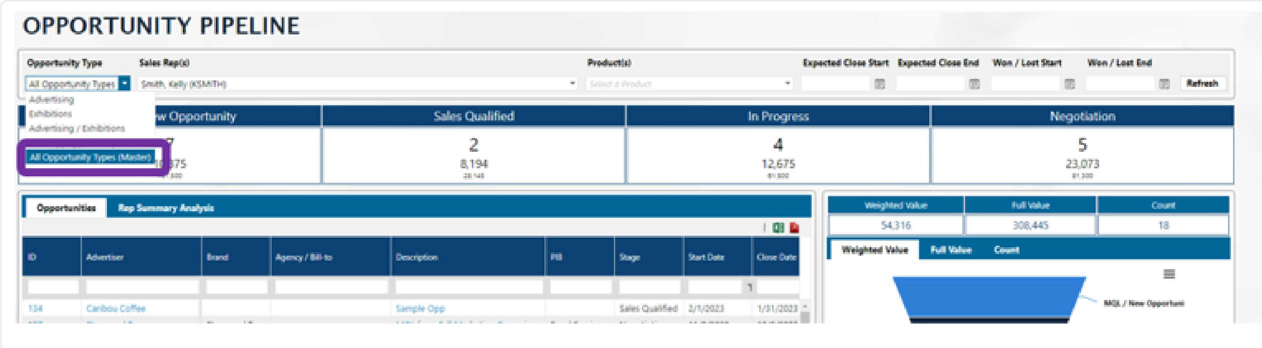
1. Select the appropriate Opportunity type at the top

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.



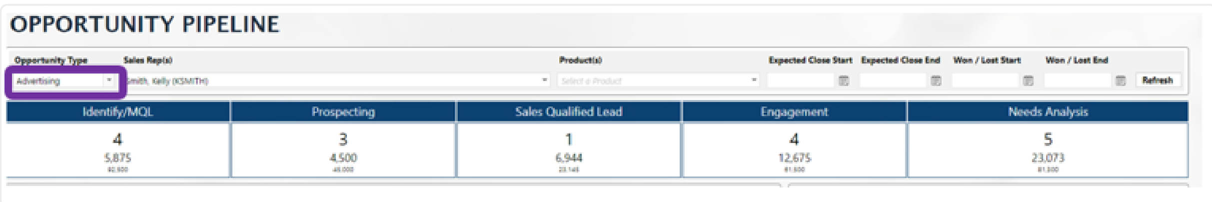
Testing Notes for Stages / Master Stages

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.

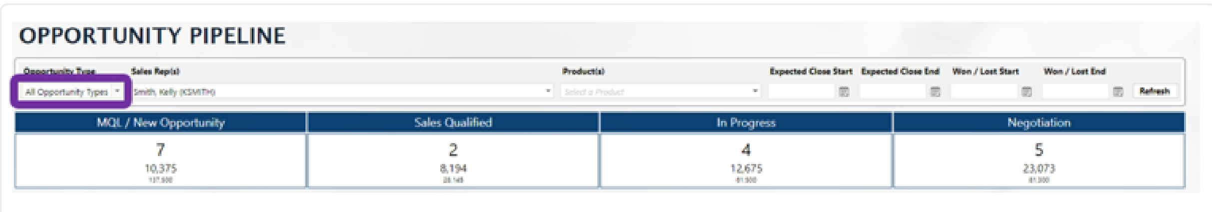


If you do ***not*** see the option for "All Opportunity Types (Master)" and would like to, follow these steps:

1. 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.
2. Navigate to Opportunity Master Stages and set up as many master Stages as you need
3. Navigate to Opportunity Stages and ensure that there is a master stage for every opportunity stage for each opportunity type.
4. Navigate to your Opportunity Pipeline Review report

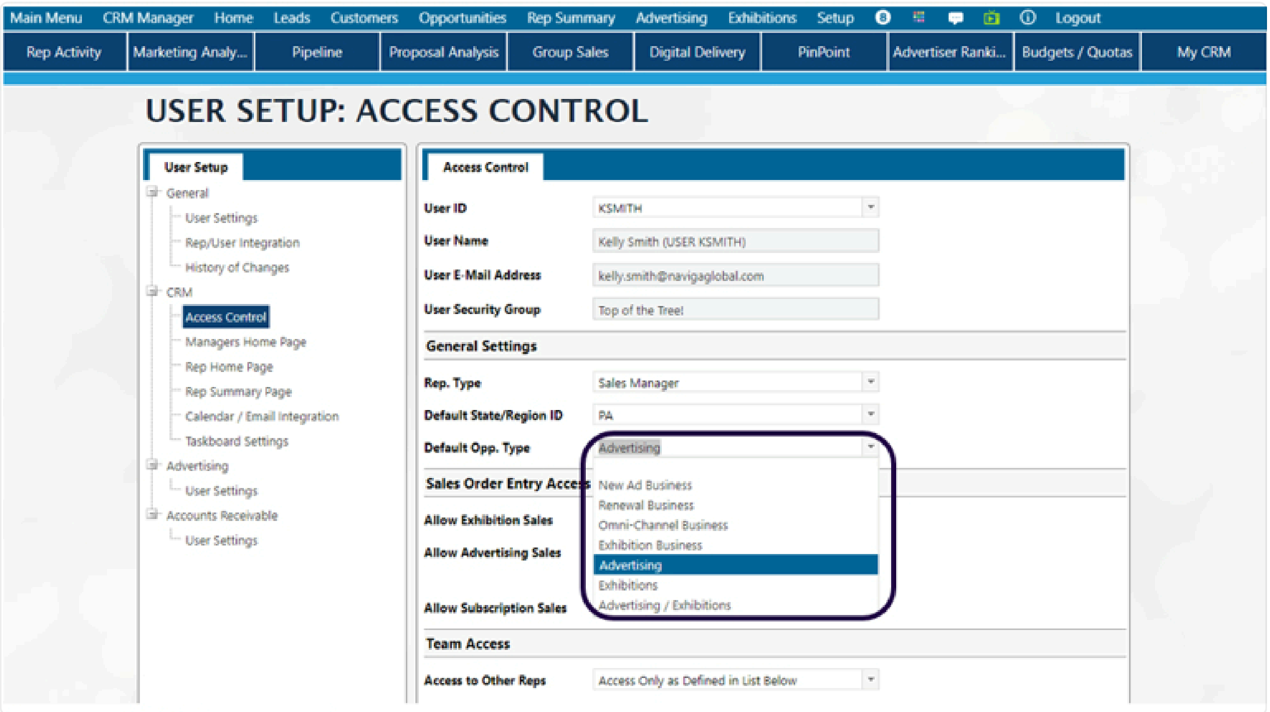


5. When viewing in the Master view, the stages displayed will be the master stages



Default Opportunity Type

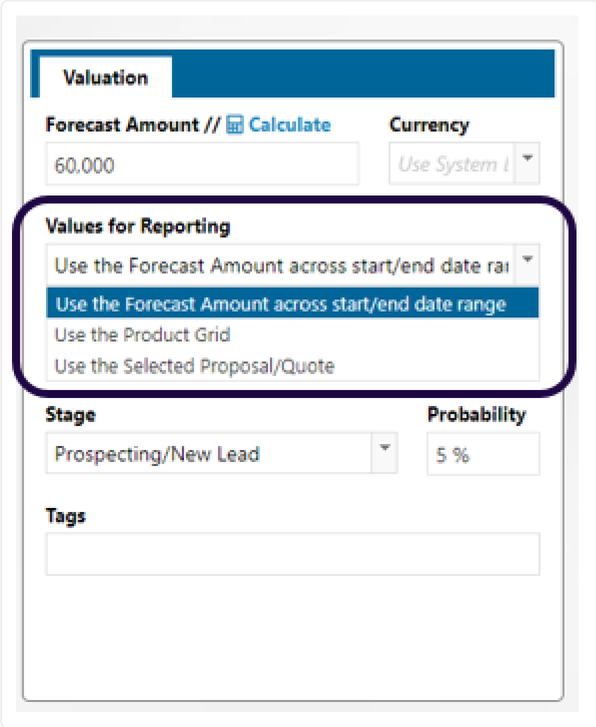
Navigate to the Setup menu in the CRM module Setup → User Security → Access Control node. Click the drop- down menu Default Opp. Type and choose the type. The types displayed in the dropdown will be dependent on the types of opportunities setup previously.



Create a CRM Opportunity

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

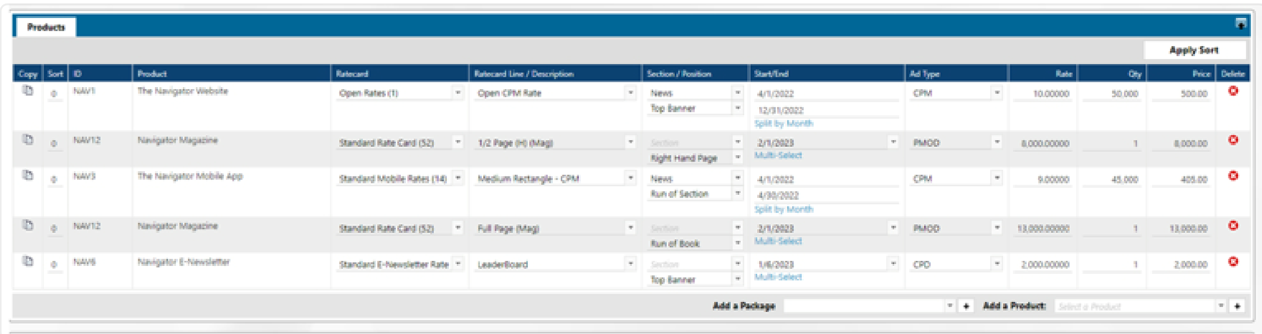
- Different layout of the screen to allow for easy access to information.
- Section to choose the Values for Reporting by three options:
  1. Use the Forecast Amount across start /end date range
  2. Use the Product Grid
  3. Use the Selected Proposal/Quote
- Ability to create new brand.
- Split digital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



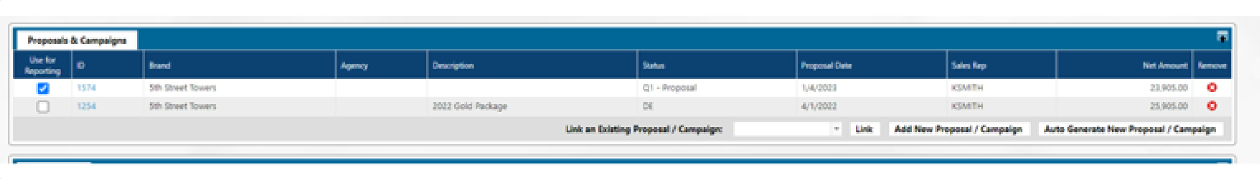
Valuation

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

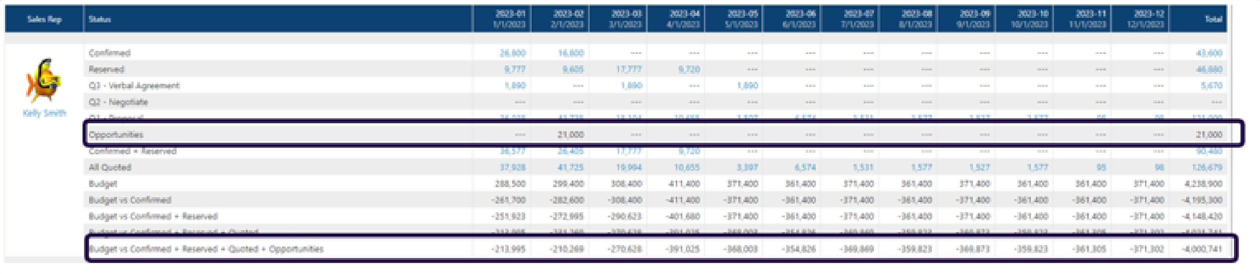
- Use the Forecast Amount across start /end date range: Use the amount in the Forecast Amount field.
- Use the Product Grid: Uses the sum all the lines in Product grid on the Opportunity



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



Here is where you will see these numbers used:



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
   - [x] Opportunity Type, Client, Brand and Agency in Basic Information
   - [x] Forecast Amount, Owner and Stage in Valuation (Leave the Values for Reporting as the default “Use forecast amount” for now)
   - [x] Start, End and Close Date in Dates (be sure to use dates in the future)
   - [x] 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

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

Products

Apply Sort

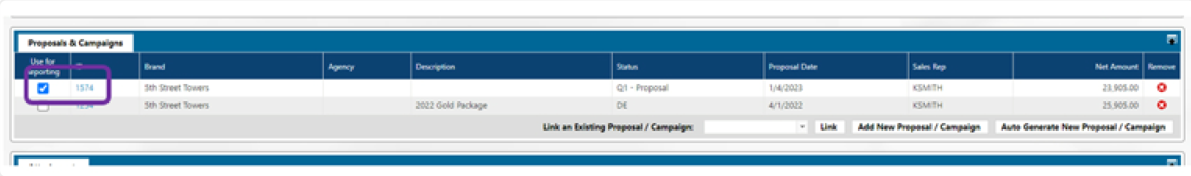
Copy	Sort	ID	Product	Ratecard	Ratecard Line / Description	Section / Position	Start/End	Ad Type	Rate	Qty	Price	Delete
	0	NAV1	The Navigator Website	Open Rates (1)	Open CPM Rate	News / Top Banner	2/1/2023 2/28/2023 Split by Month	CPM	10.00000	50,000	500.00	
	0	NAV12	Navigator Magazine	Standard Rate Card (52)	1/2 Page (H) (Mag)	Section / Right Hand Page	2/1/2023 Multi-Select	PMOD	8,000.00000	1	8,000.00	
	0	NAV3	The Navigator Mobile App	Standard Mobile Rates (14)	Medium Rectangle - CPM	News / Run of Section	2/1/2023 2/28/2023 Split by Month	CPM	9.00000	45,000	405.00	
	0	NAV12	Navigator Magazine	Standard Rate Card (52)	Full Page (Mag)	Section / Run of Book	3/1/2023 Multi-Select	PMOD	13,000.00000	1	13,000.00	
	0	NAV6	Navigator E-Newsletter	Standard E-Newsletter Rate	LeaderBoard	Section / Top Banner	2/24/2023 Multi-Select	CPD	2,000.00000	1	2,000.00	

Add a Package: + Add a Product: Select a Product +

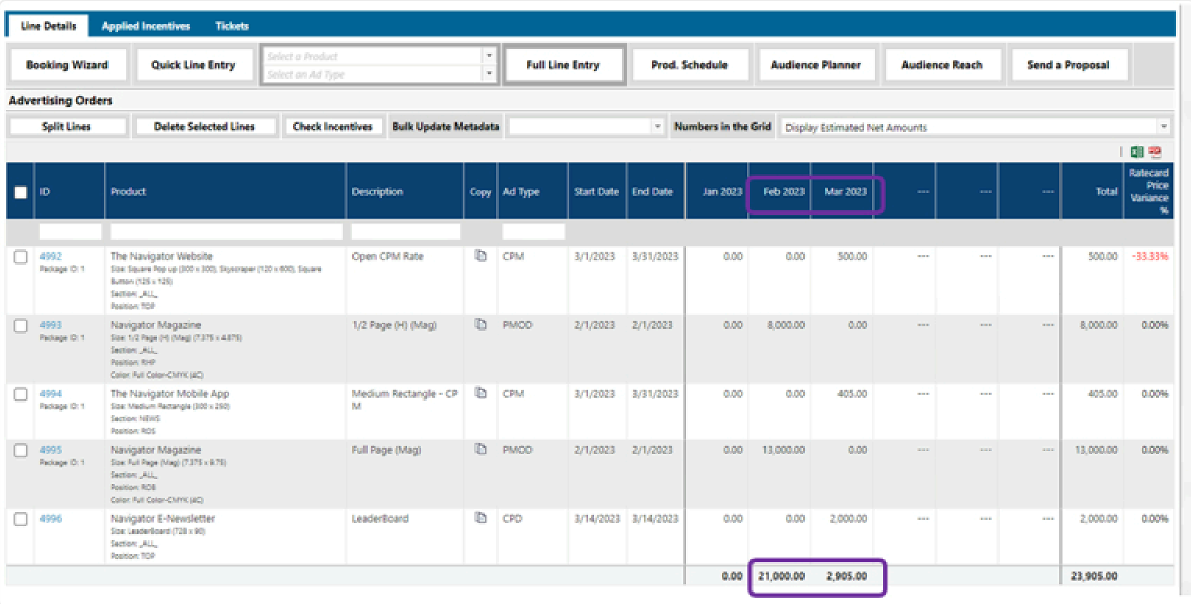
7. Save Opportunity
8. Navigate to Rep Activity again and note the values have changed to now reflect the schedule within the grid

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

9. 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
10. 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"



11. Note the dates reflected in the Proposal



Line Details | Applied Incentives | Tickets

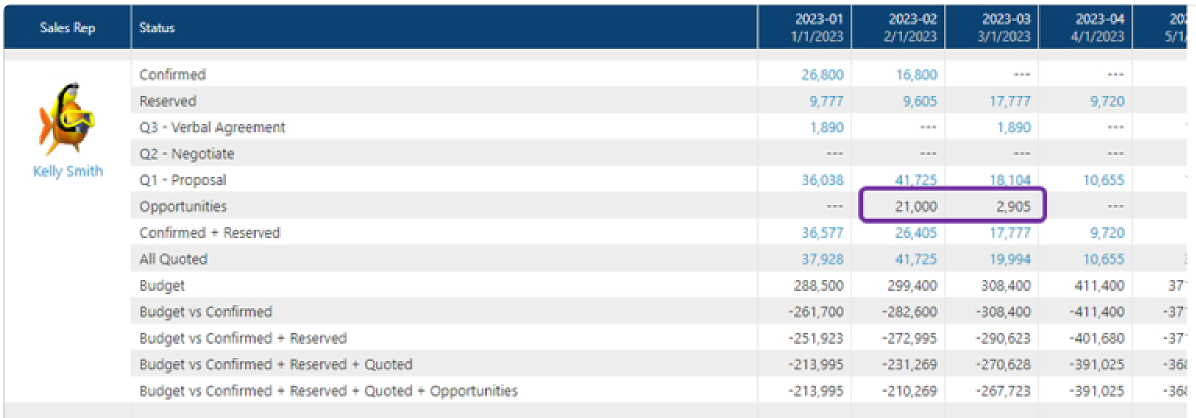
Booking Wizard | Quick Line Entry | Full Line Entry | Prod. Schedule | Audience Planner | Audience Reach | Send a Proposal

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	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	1/2 Page (H) (Mag)		PMOD	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	Medium Rectangle - CPM		CPM	3/1/2023	3/31/2023	0.00	0.00	405.00	---	---	---	405.00	0.00%
4995 Package ID: 1	Navigator Magazine	Full Page (Mag)		PMOD	2/1/2023	2/1/2023	0.00	13,000.00	0.00	---	---	---	13,000.00	0.00%
4996	Navigator E-Newsletter	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
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
	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	-231,269	-270,628	-391,025
	Budget vs Confirmed + Reserved + Quoted + Opportunities	-213,995	-210,269	-267,723	-391,025

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	20 6/
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.

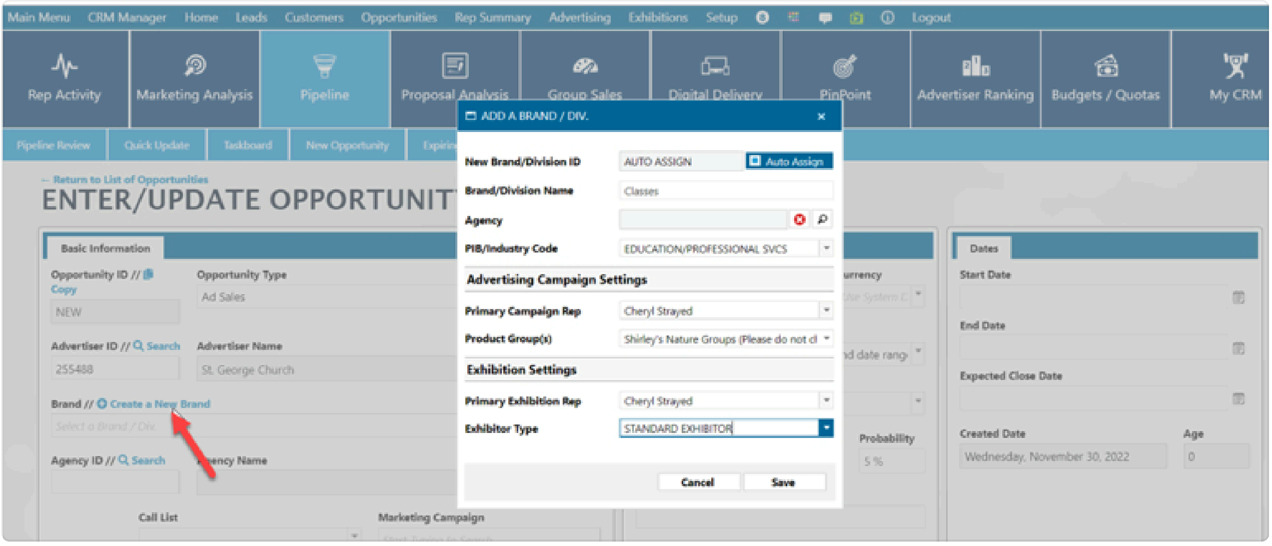
Create New Brand

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".

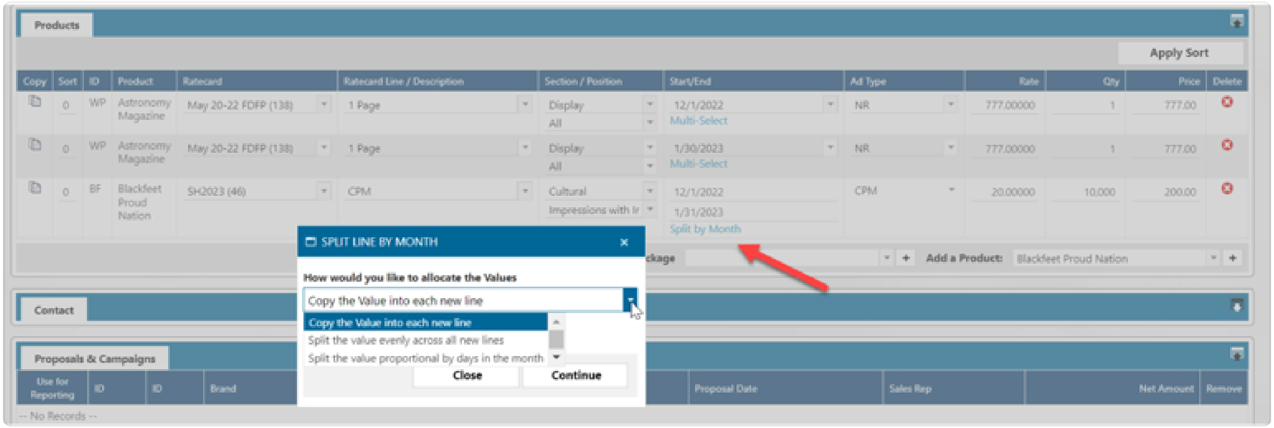
Enter the details of this brand in the pop-up window and save. This brand is now the one on this opportunity.

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.



Split Digital Lines as in Order Entry

Scroll to the Products grid.



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:

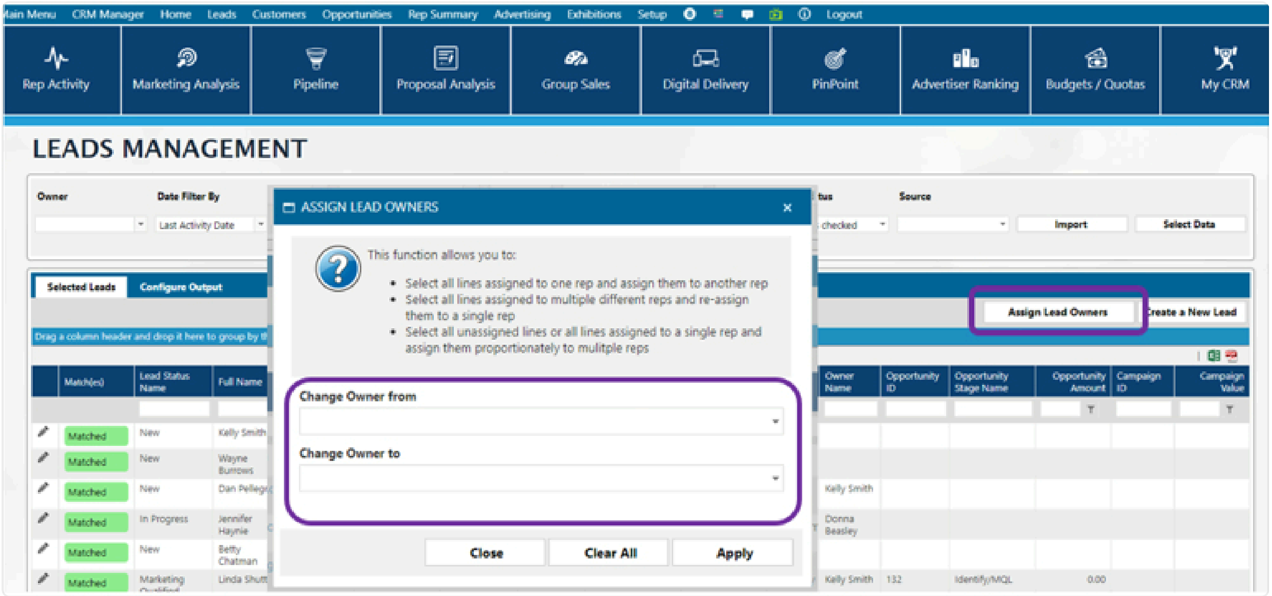
- Copy the Value into each line: This copies the same amount into each new line you split.
- Split the value evenly across all new lines: This divides the amount on the line across the split lines equally.
- Split the value proportional by days in the month: This divides the amounts across the month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



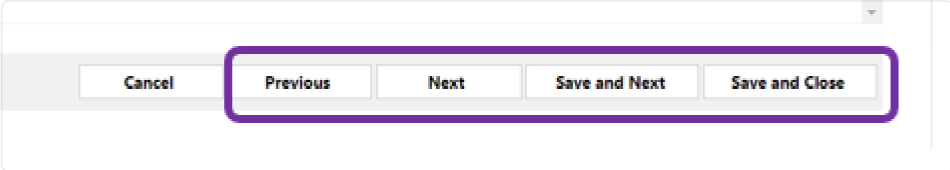
You can now bulk-assign lead owners to imported leads by clicking on Assign Lead Owners and selecting one or more users to change owner from and two. Leave "Change own from" blank if you want to assign unassigned leads to one or more people.

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.

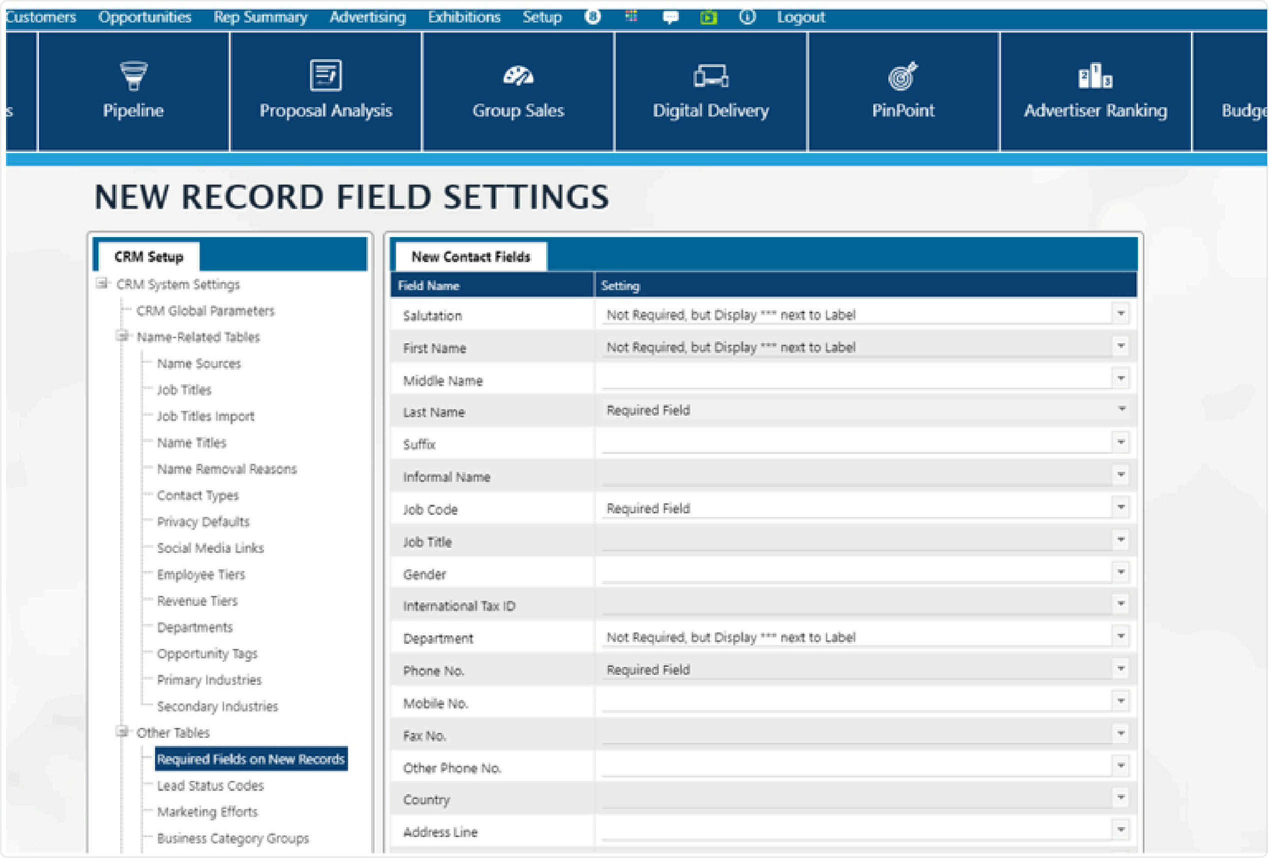


New Account, Contact, Actions, and Notes Field Settings

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”.



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

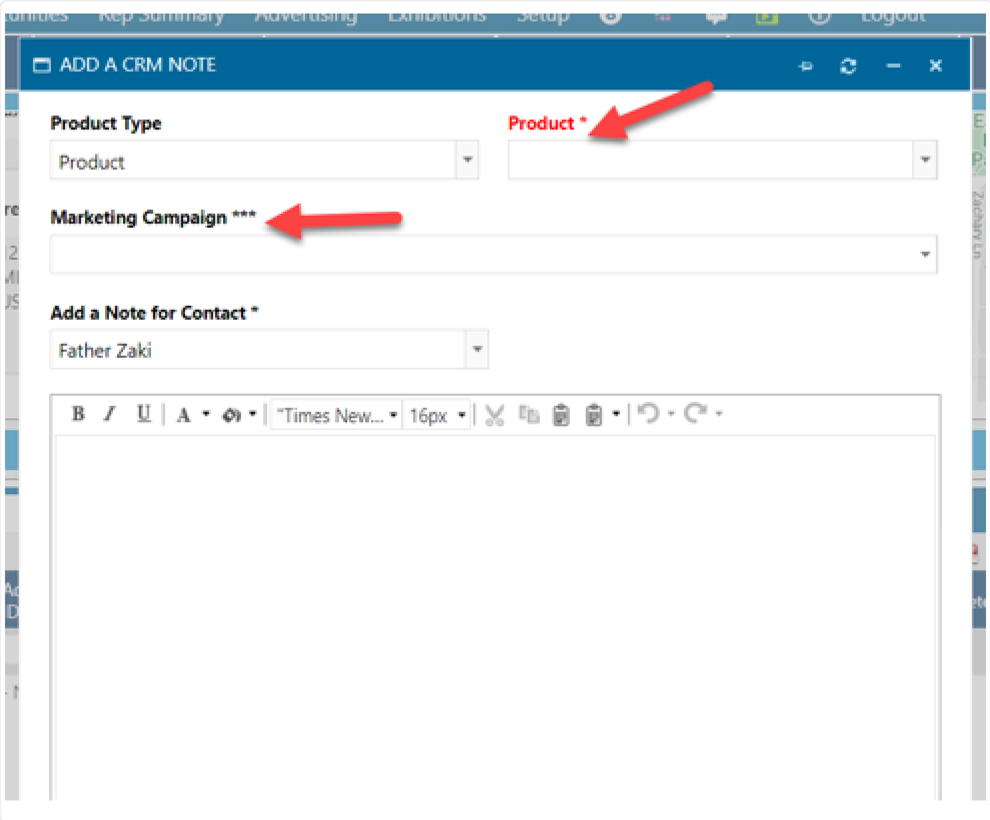
- Blank, leaving them as optional, or
- Required, making the field required where the record will not be saved when creating the contact if this field isn't entered, or
- Not Required, but Display *** next to Label, where the field is not mandatory, but the field has a label *** by it. This alerts the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

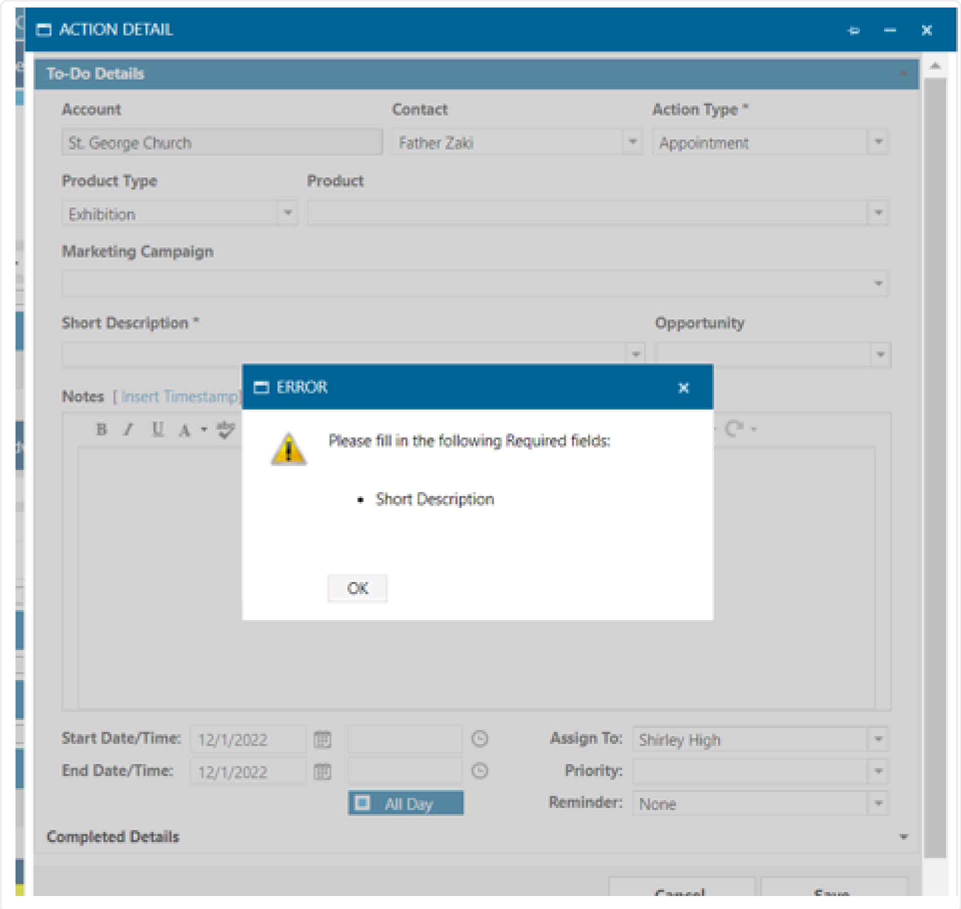
Navigate to a contact record in Customers → Customer Overview an account.



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.

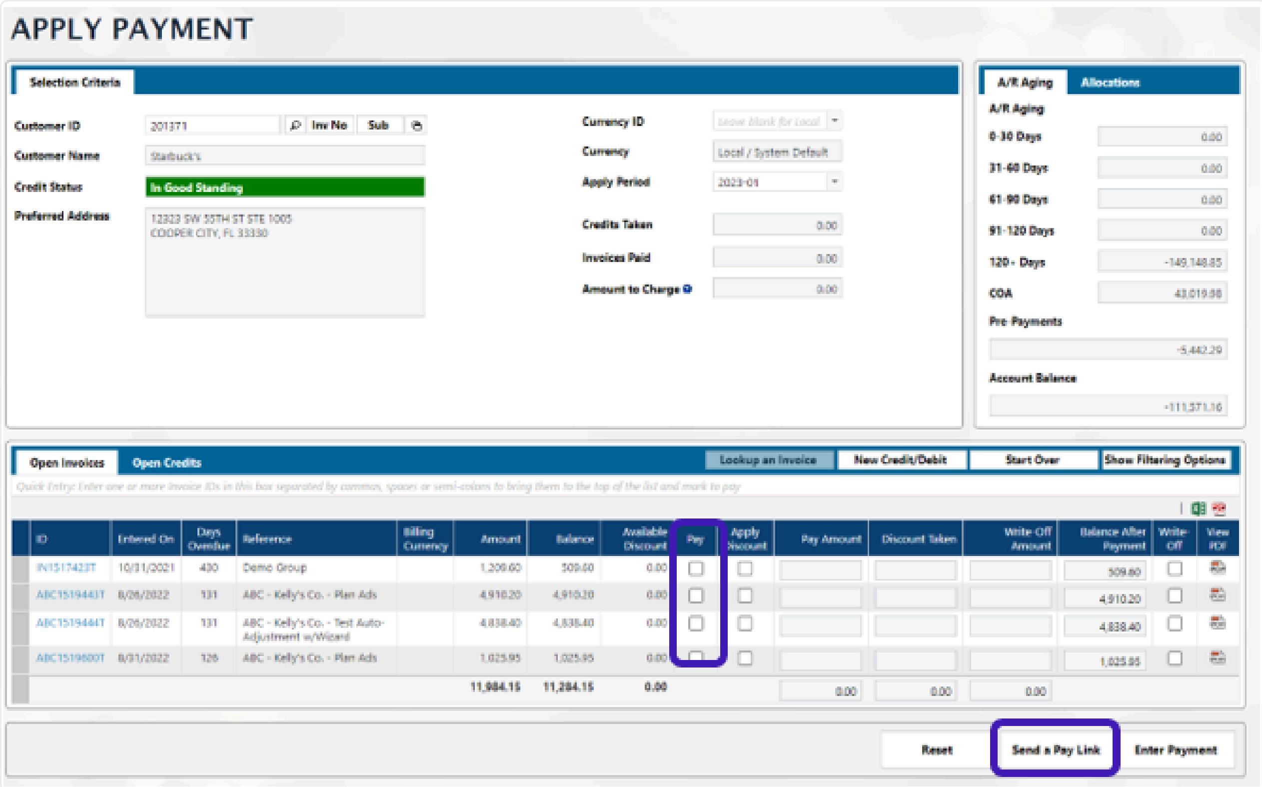


Accounts Receivable Module

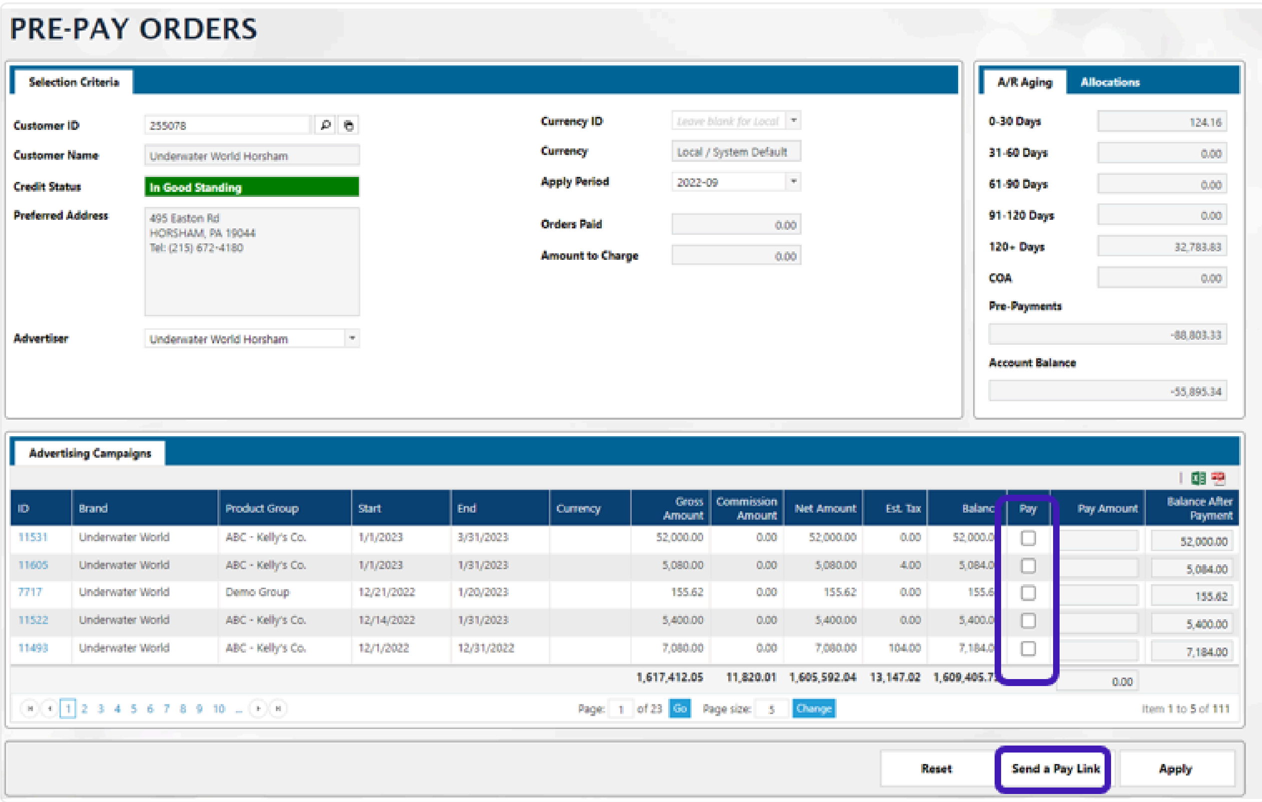
Quick Links for Payments

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.

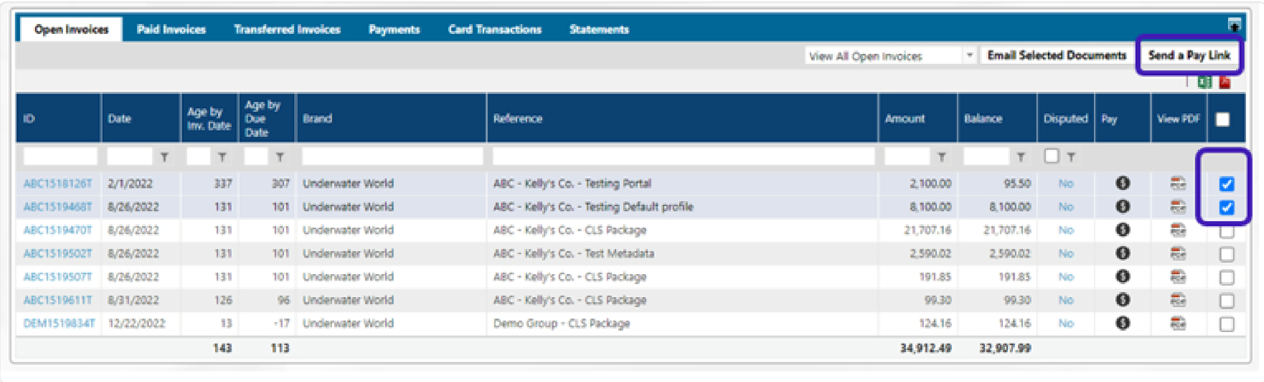
- User navigates to A/R → Payments → Pay Invoice(s). User searches on the customer id and selects invoices to be paid by checking the box under the "Pay" column.



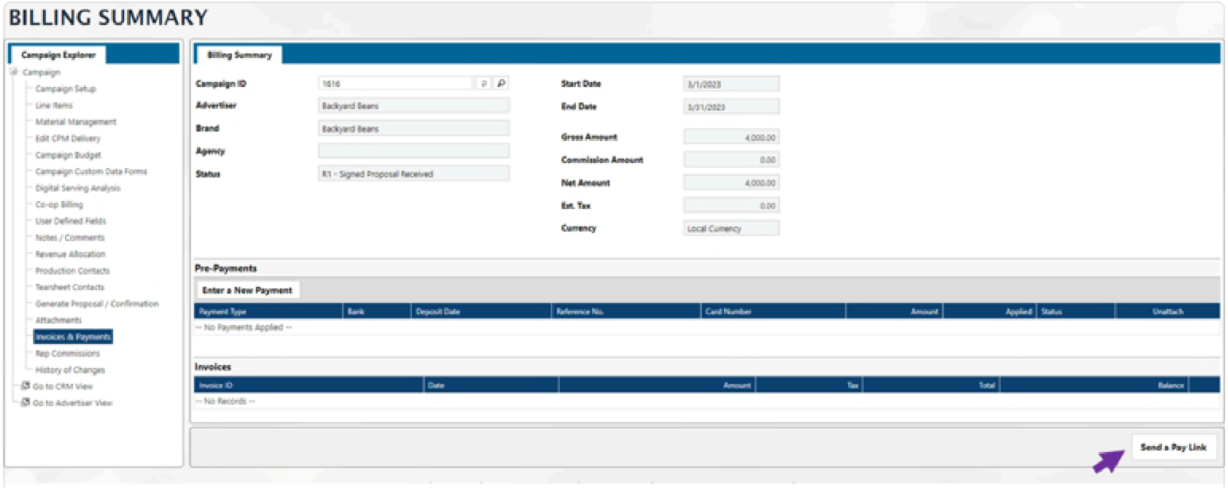
- User navigates to A/R → Payments → Pre-Pay an Order. User searches on the customer id and selects Confirmed but not invoiced orders to be paid by checking the box under the “Pay” column and then select the “send a Pay Link” button.



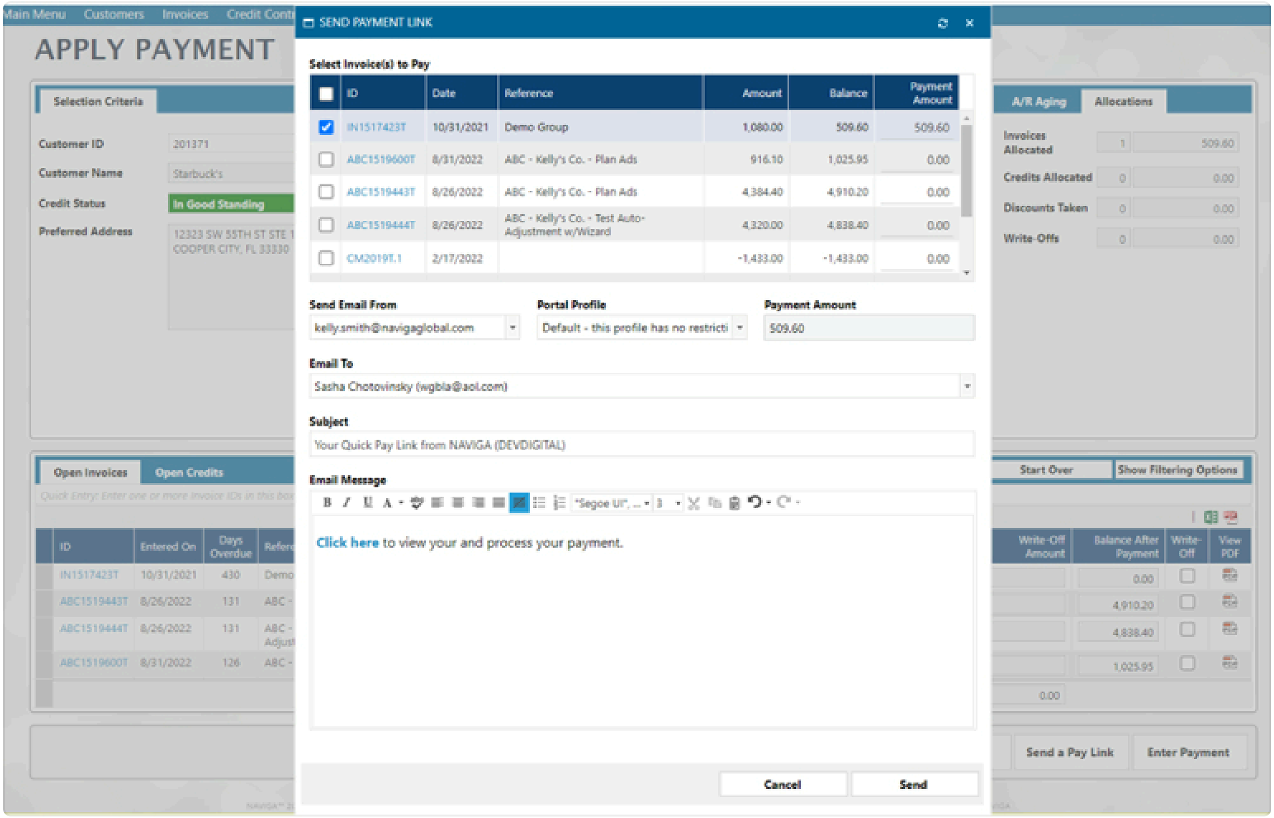
- In the Advertising or CRM Module, From the Accounting tab on the Customer details screen the user selects one or multiple invoices from the list of open invoices and then selects the “Send a Pay Link” option. If the user does not have access to take payments themselves, they might not see the checkboxes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



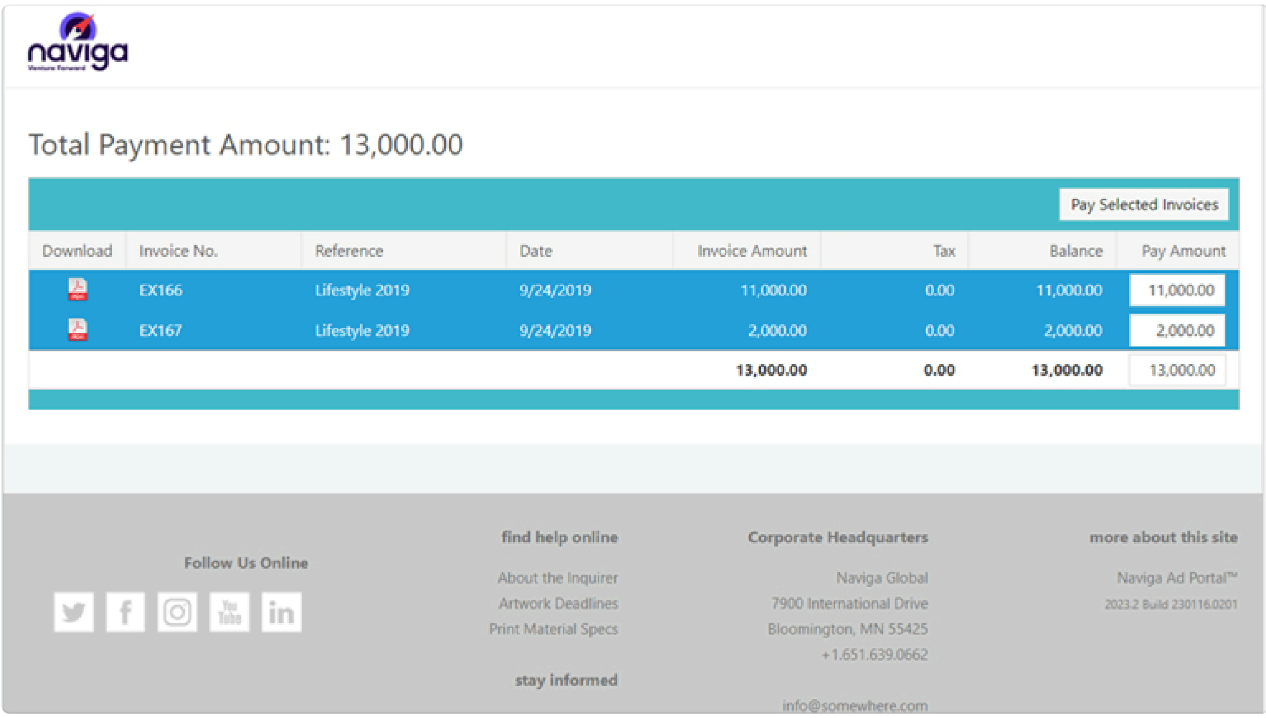
- From a Campaign in Reserved or Confirmed Status user navigates to the Invoices and payments node and sends a paylink from there:



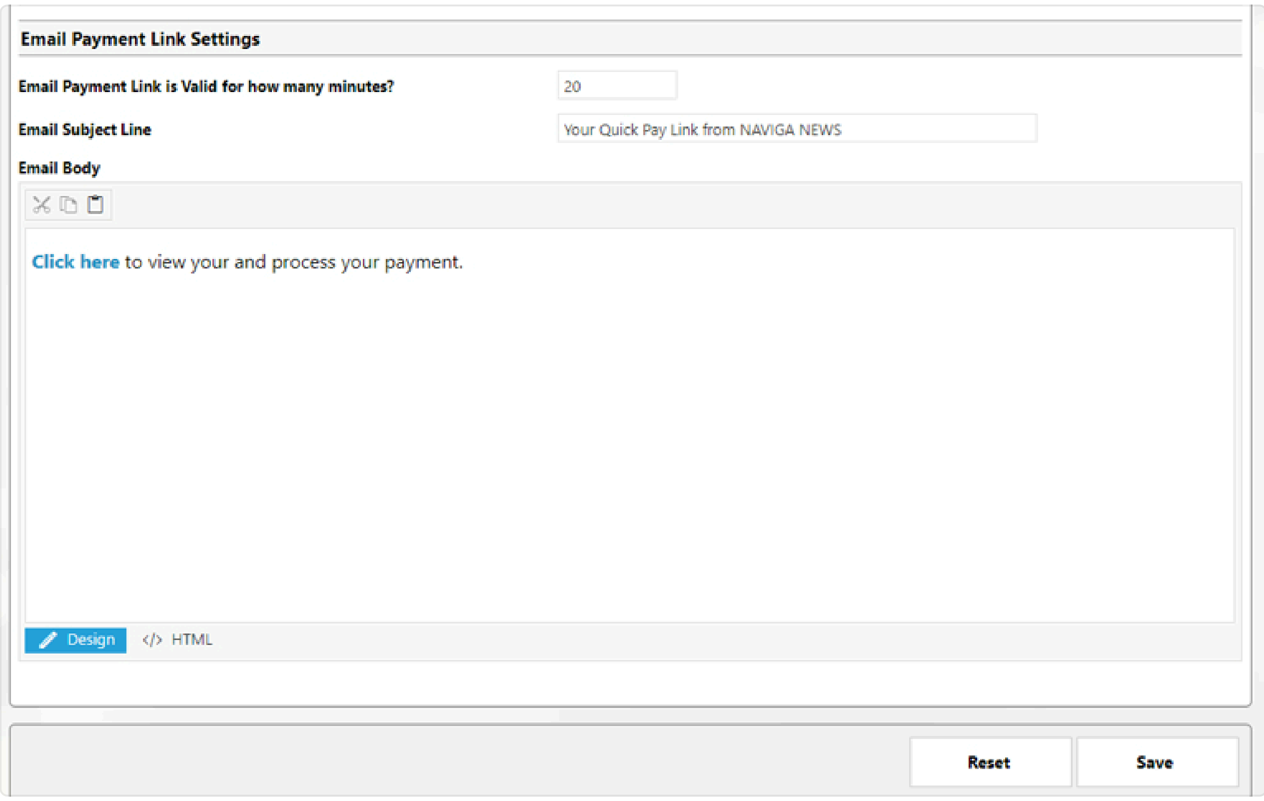
Regardless of which of the above screens you start from, you will next be taken to a screen allowing you to customize the message and select who to send the email to. If you have multiple portal profiles configured, and since this could potentially be paying for several invoices across profiles, the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



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.



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



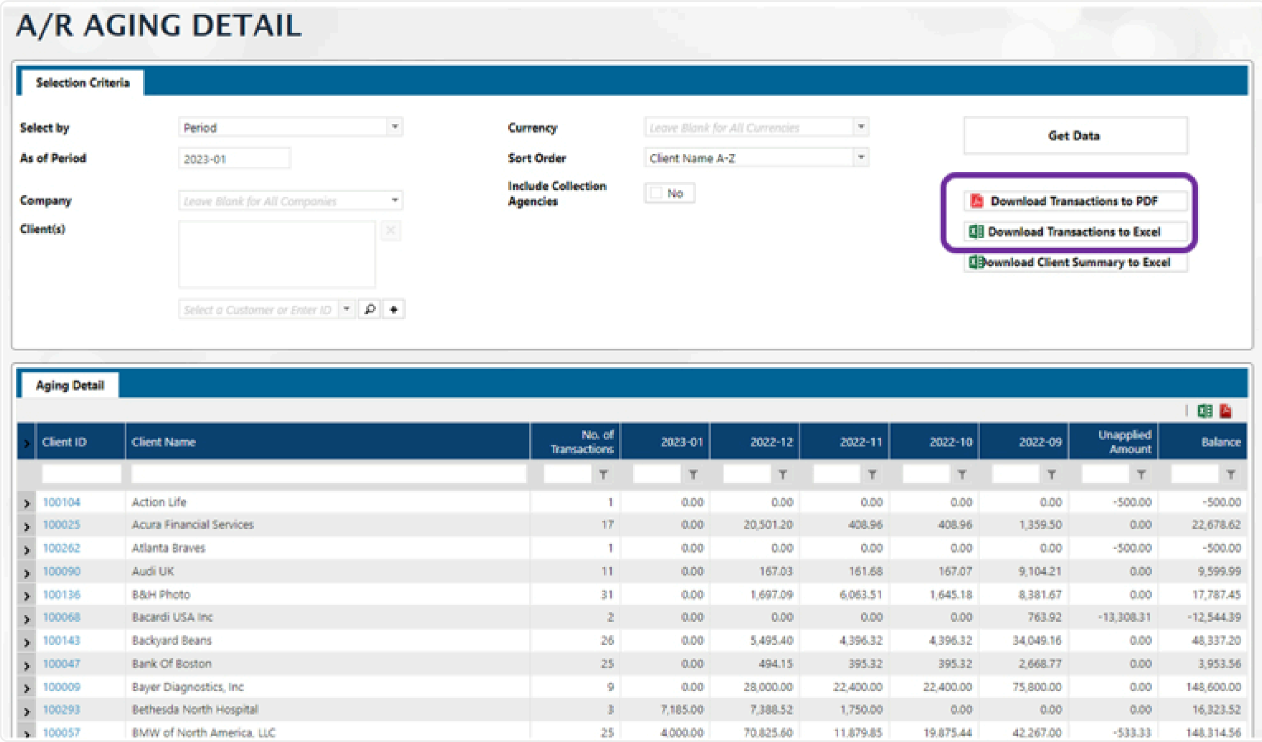
- Enter the desired amount of time to allow this link to be valid for (in minutes)
- Enter the desired default Subject Line text
- Using the Design and HTML tabs at the bottom, create your desired default text. Here is our sample HTML from above:

```
<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

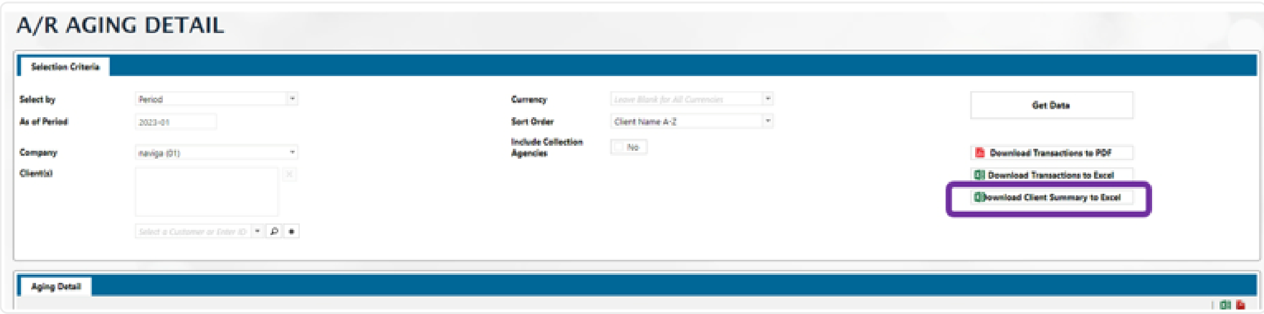


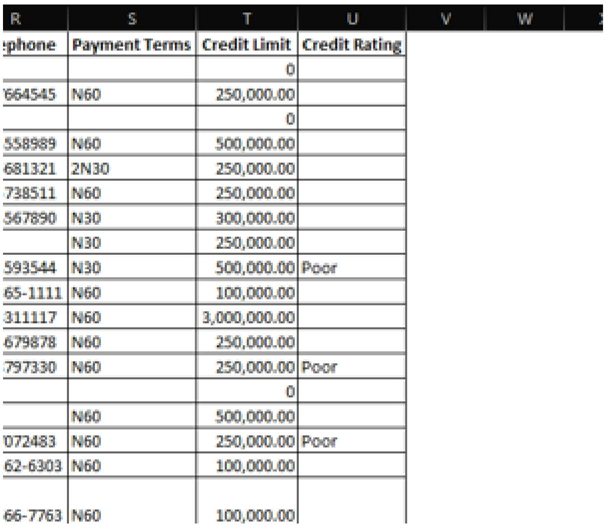
Client ID	Client Name	No. of Transactions	2023-01	2022-12	2022-11	2022-10	2022-09	Unapplied Amount	Balance
100104	Action Life	1	0.00	0.00	0.00	0.00	0.00	-500.00	-500.00
100025	Acura Financial Services	17	0.00	20,501.20	408.96	408.96	1,359.50	0.00	22,678.62
100262	Atlanta Braves	1	0.00	0.00	0.00	0.00	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)

AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV
ephone	Payment Terms	Credit Limit	Rep ID 1	Rep Name 1	Rep ID 2	Rep Name 2	Rep ID 3	Rep Name 3	Rep ID 4	Rep Name 4	
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					
	N30	2,500,000.00	KELLY	Kelly Smith	WAYNE	Wayne Burrows					

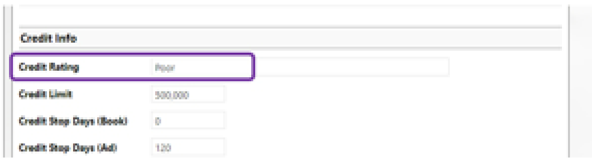
✅ Credit Rating added to the A/R Aging Detail Summary Download





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			

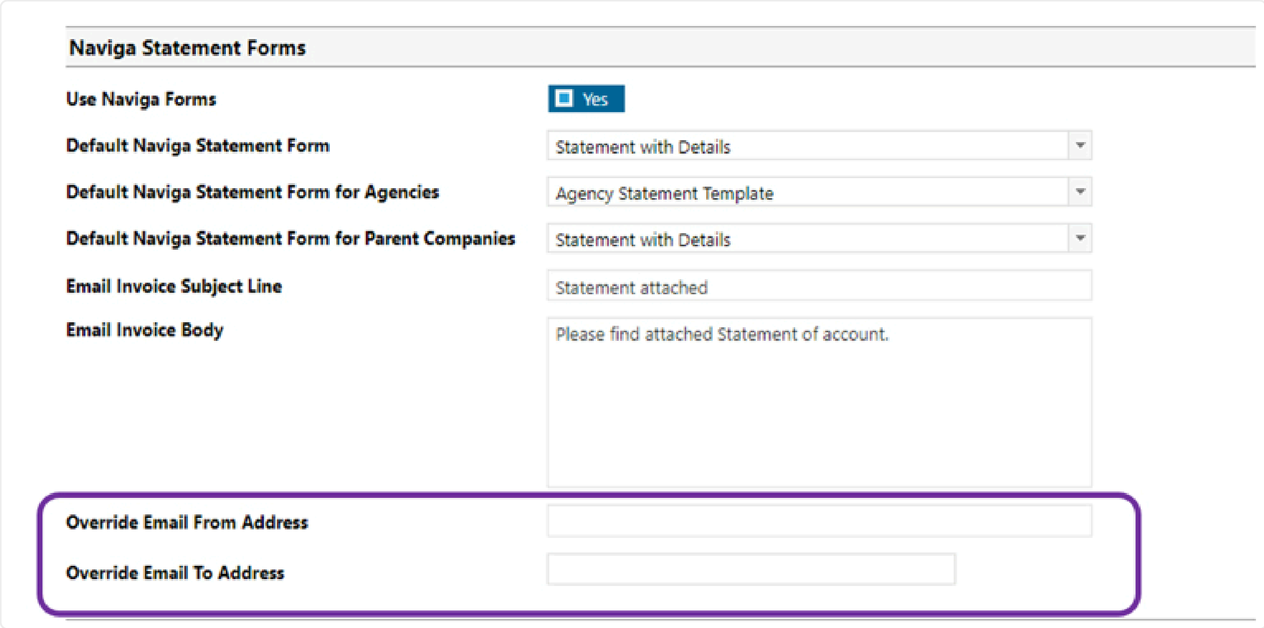
The rating information comes from here on the Name Maintenance screen, on the A/R node:



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



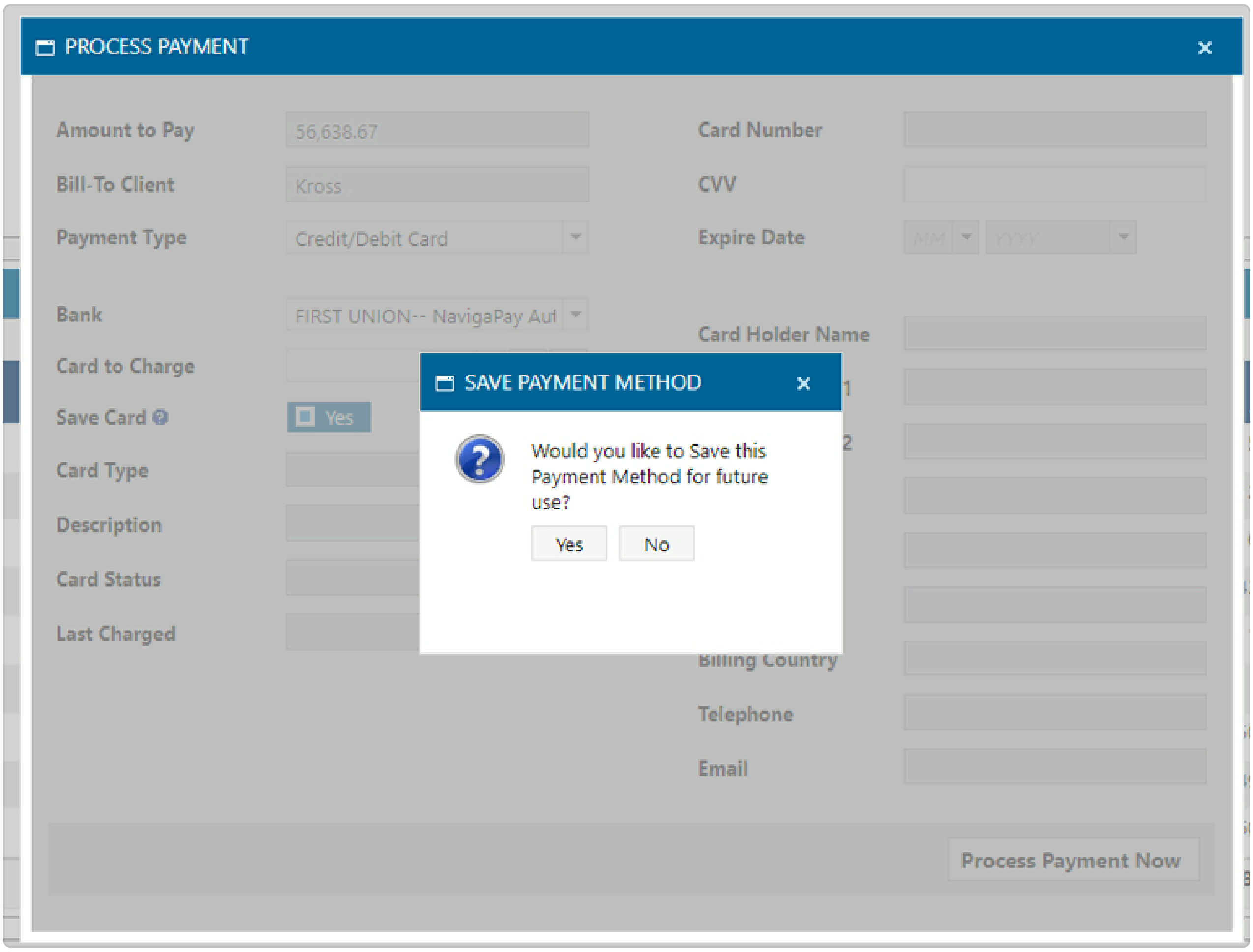
- **Override Email From Address** - This will display the desired from address (perhaps "statements@mediacompany.com" or "accounting@mediacompany.com"
- **Override Email To Address** - This will override the To email address to be a specific email address. This comes in handy when you are testing a new 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.

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

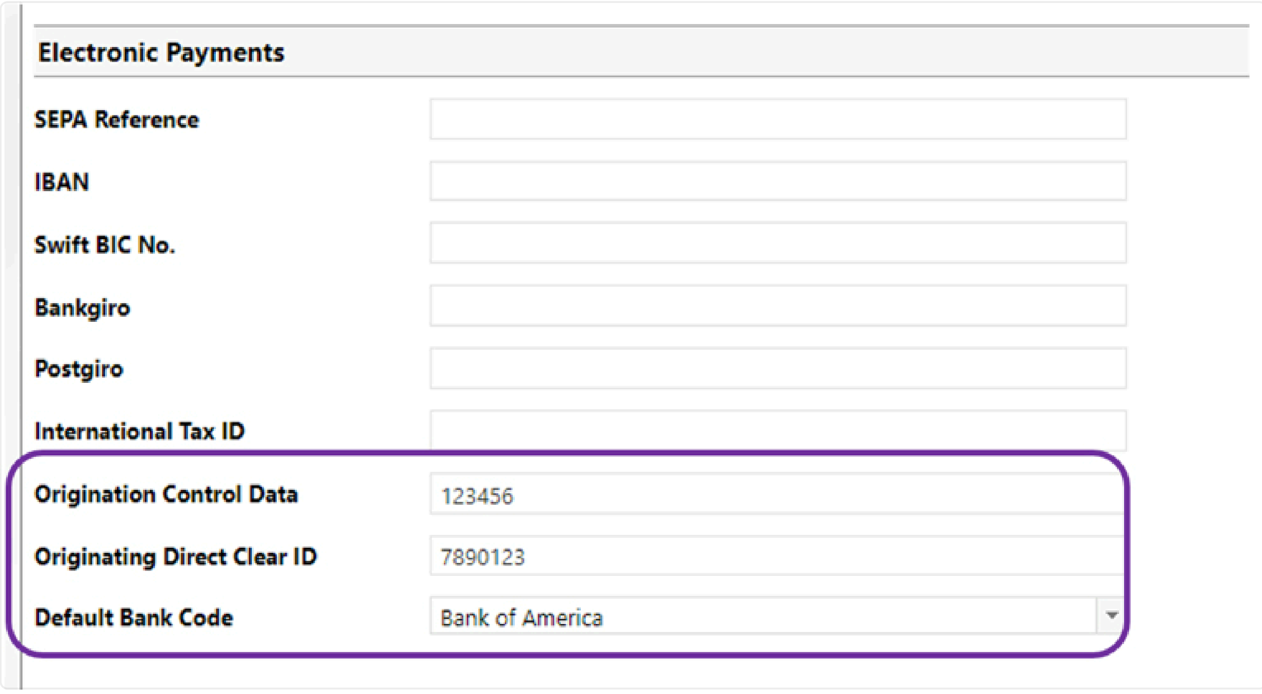


Direct Debits

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.

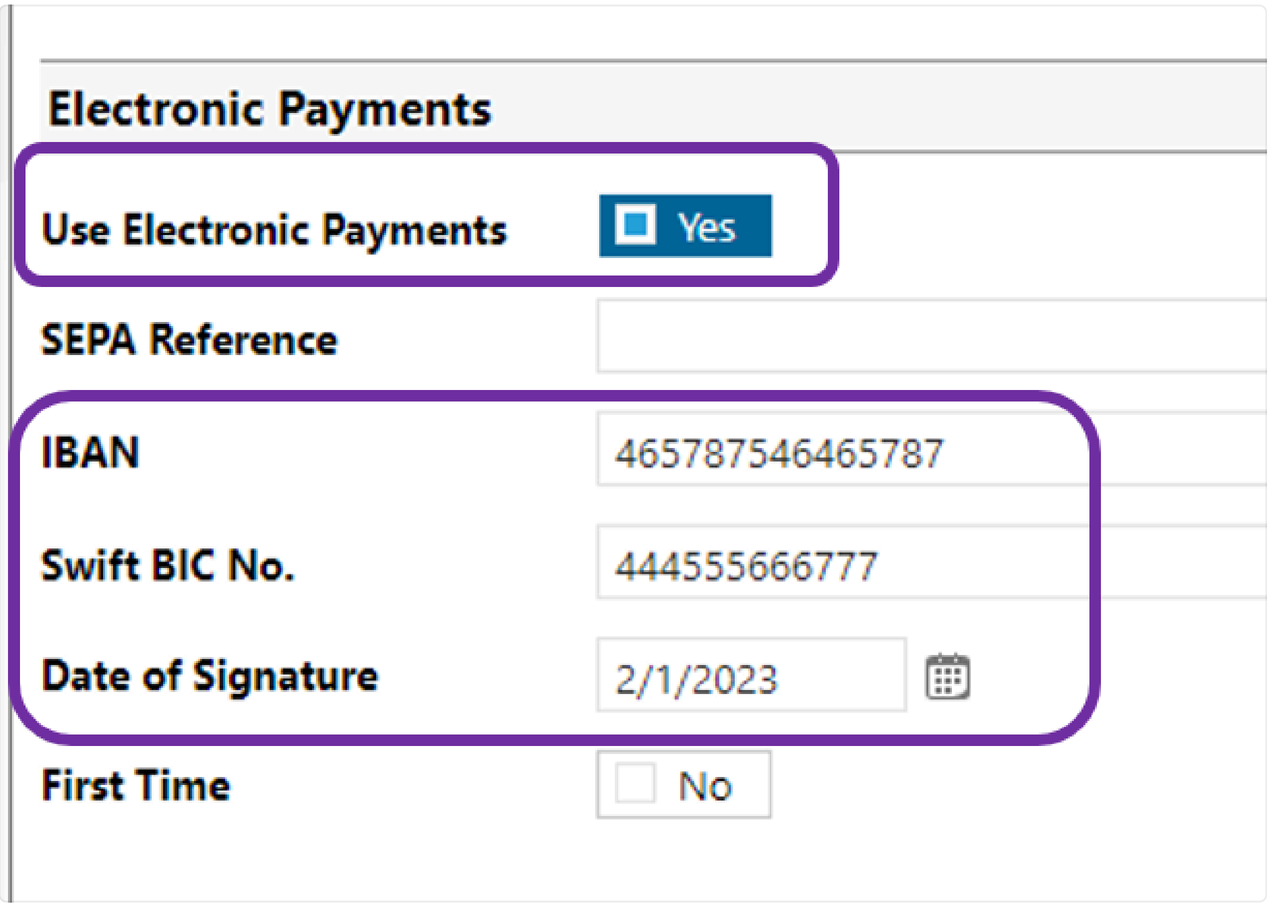
Prerequisites

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



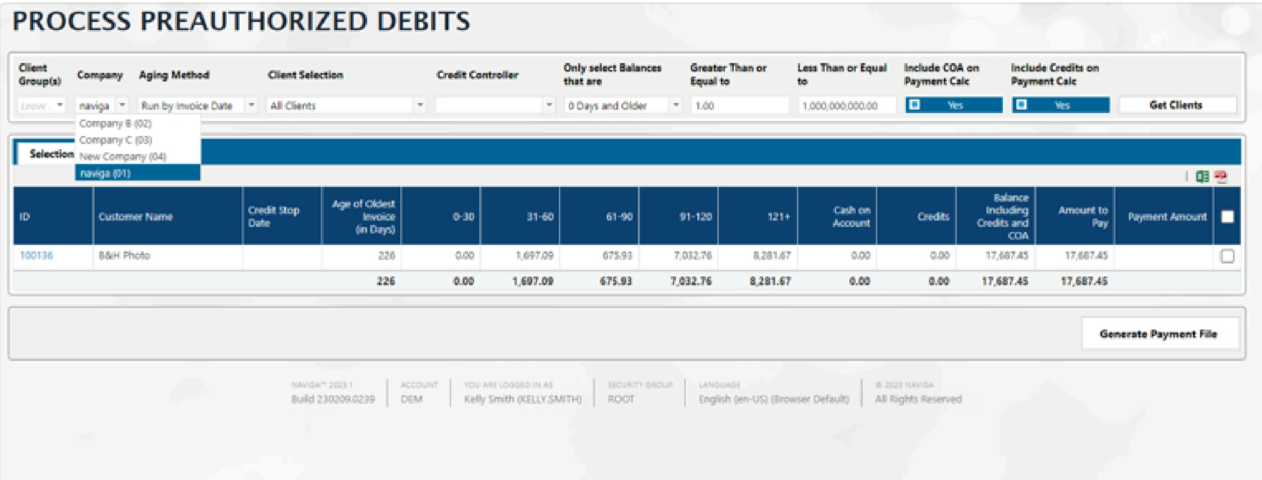
2. On your client accounts, on the A/R Node, scroll down to the Electronic Payments section. These 4 fields are relevant to the Direct Debits.

- 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.



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.

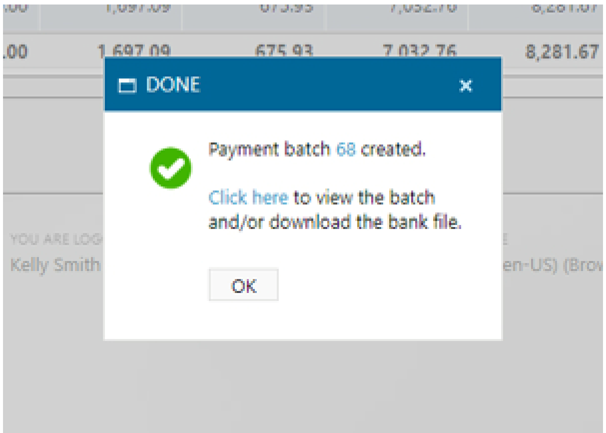


Enter other search filters as desired. and click "Get Clients"

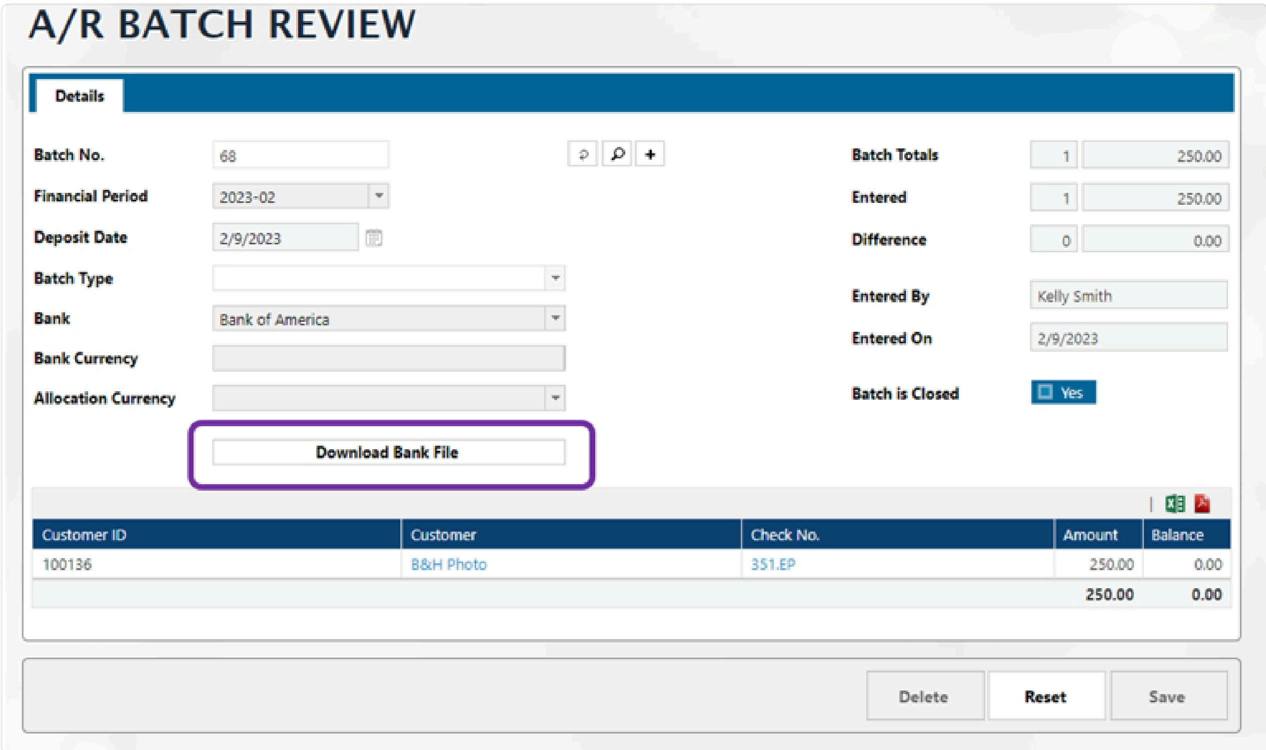
List of clients will be displayed. Click the checkboxes at the end of each row (or at the last header) to select single accounts or select all.

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.

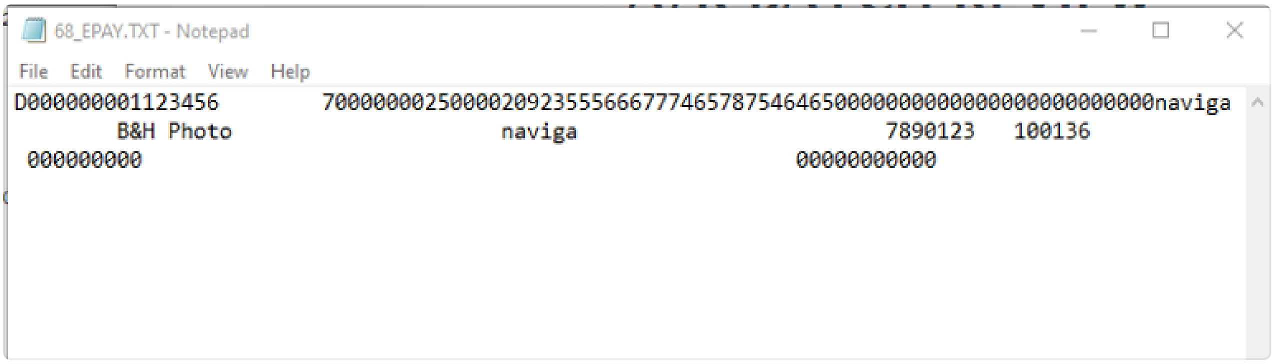
Click the button at the bottom and it will create the payment batch.



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



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.

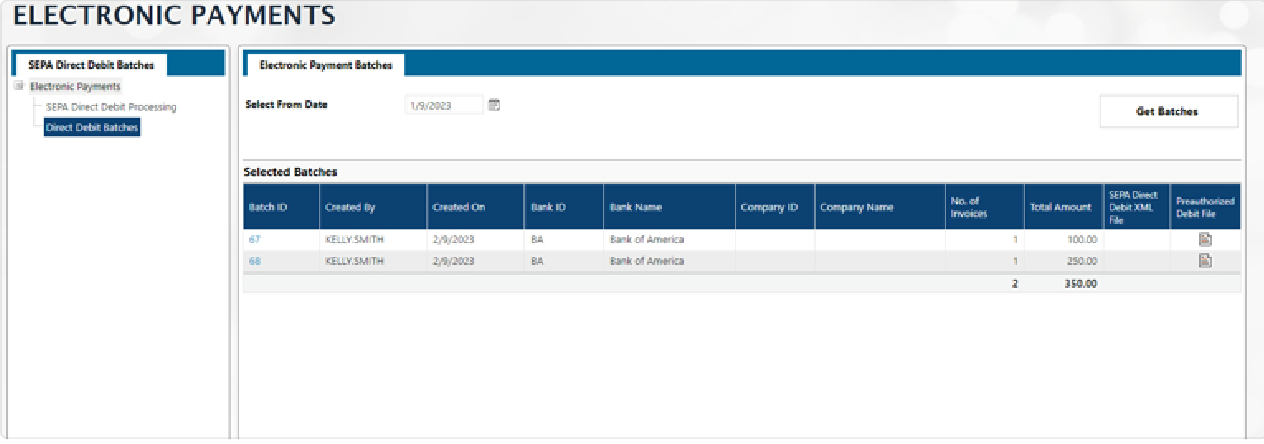
Easiest way to reverse the check would be to select the payment ID from the batch (or search for it in the payments report) and then in the top right either Void the check (if it hasn't posted to the G/L) or Return the check if void is no longer an option.

Find a previous batch

Navigate to Payments → SEPA Direct Debit Processing

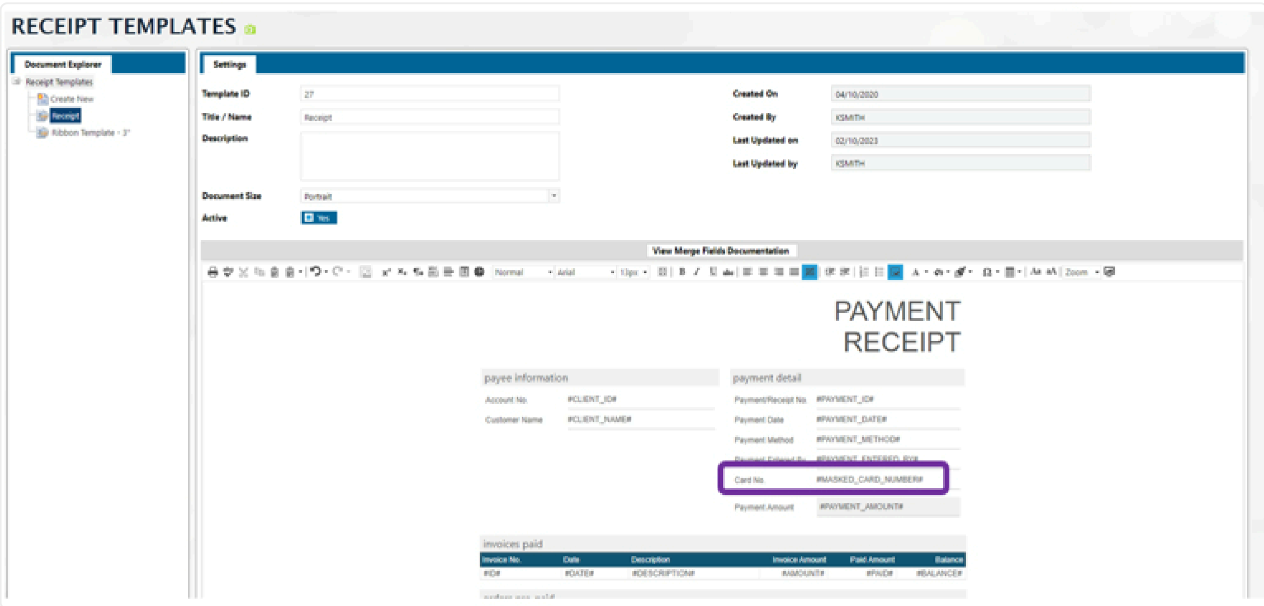
The Direct Debit Batches for Pre-authorized Direct Debits are in the same location as those for the SEPA Payments. Click on the Direct Debit Batchs node.

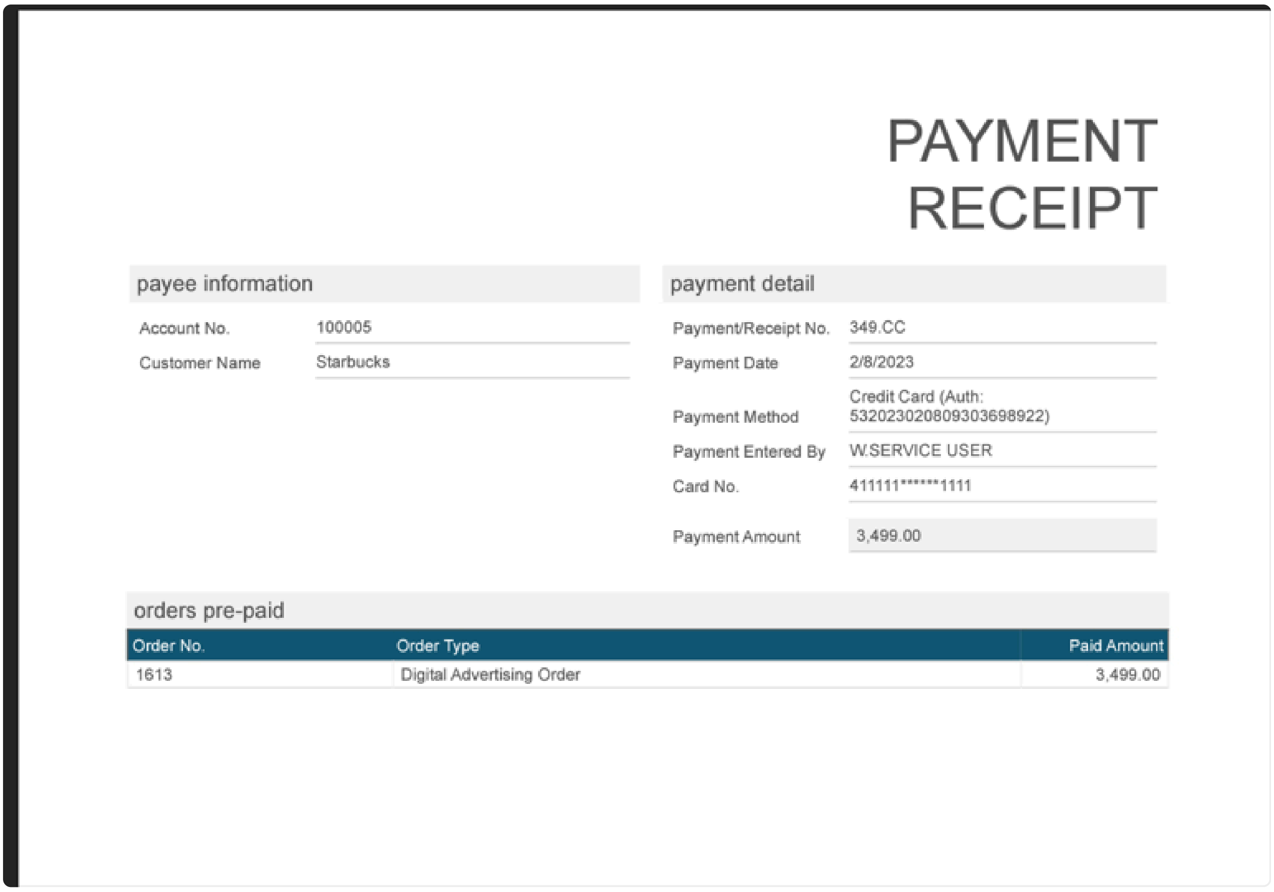
Select a From Date, and click on Get Batches. All batches for the selected date will be displayed. If it was a SEPA batch, the downloadable file will be in the SEPA column, otherwise it will be in the Preauthorized Debit File column. Click the file icon to download.



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.





PAYMENT RECEIPT

payee information

Account No.	100005
Customer Name	Starbucks

payment detail

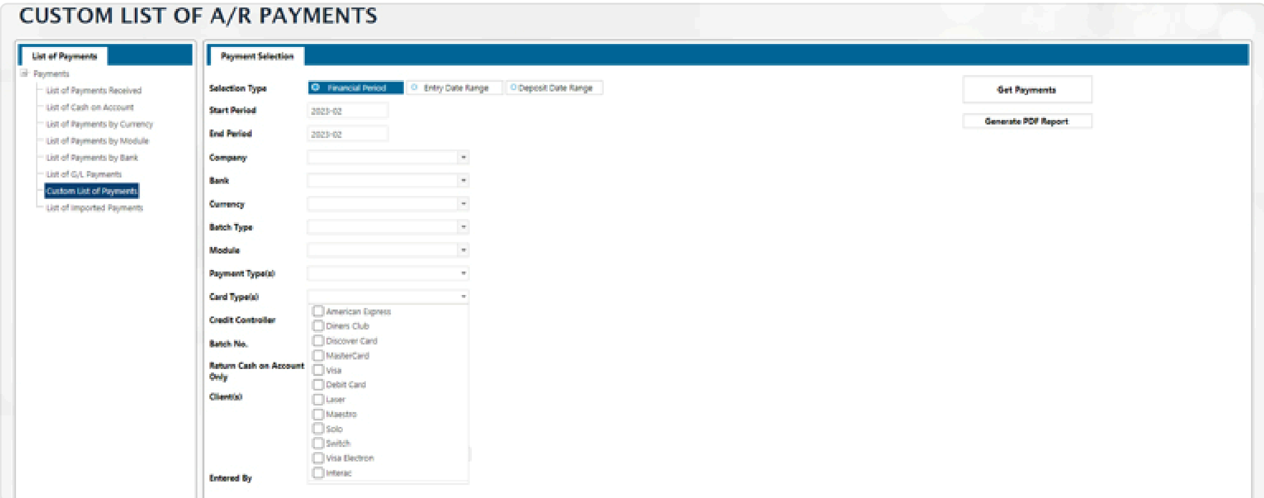
Payment/Receipt No.	349.CC
Payment Date	2/8/2023
Payment Method	Credit Card (Auth: 5320230208093036989922)
Payment Entered By	W.SERVICE USER
Card No.	411111******1111
Payment Amount	3,499.00

orders pre-paid

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

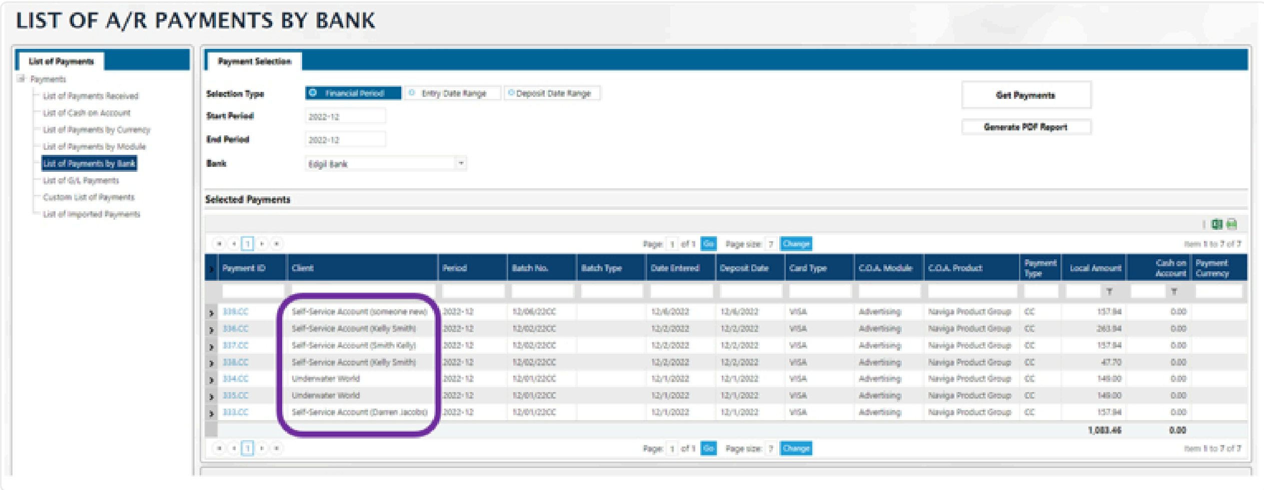
Credit Card Type added as a filter in Custom List of A/R Payments

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.



☑️ 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)

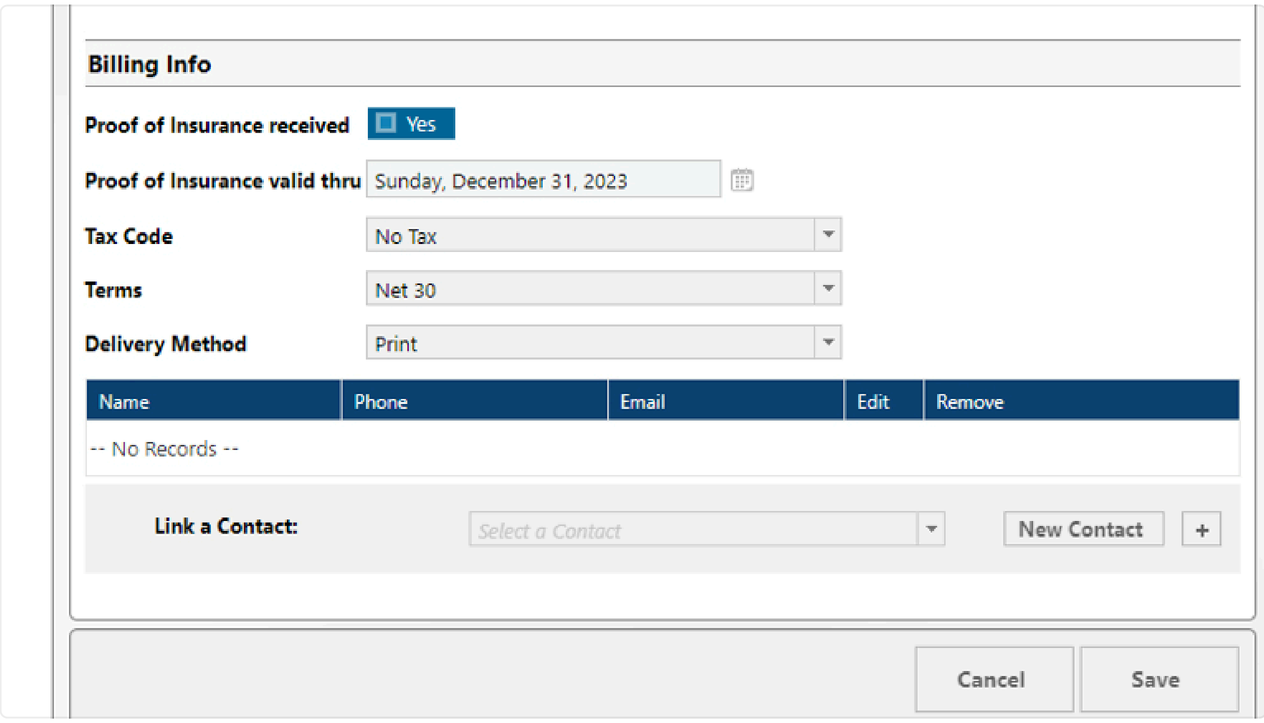


Notice that the Transient account name now also has the person's first and last name included to make it easier to find payments.

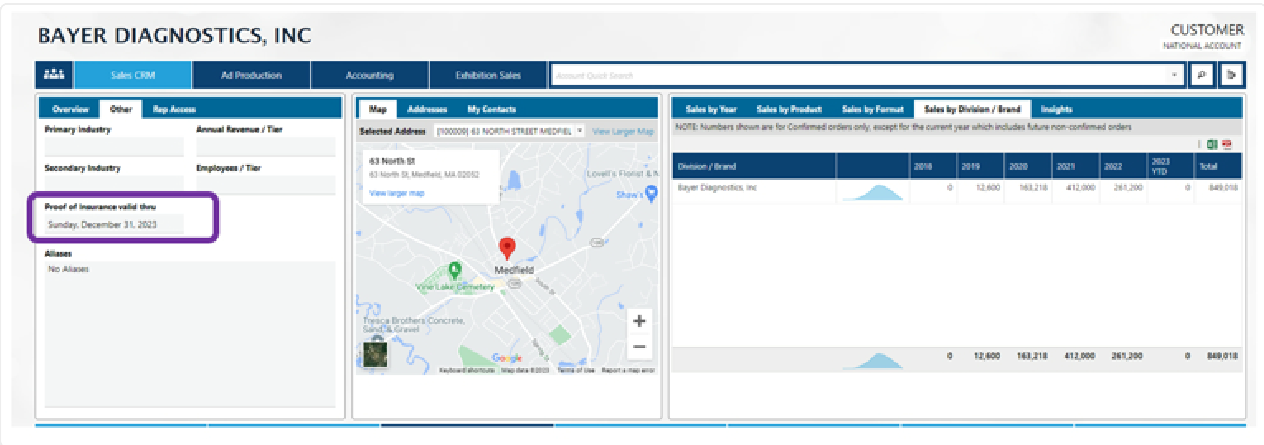
Exhibition Module

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:



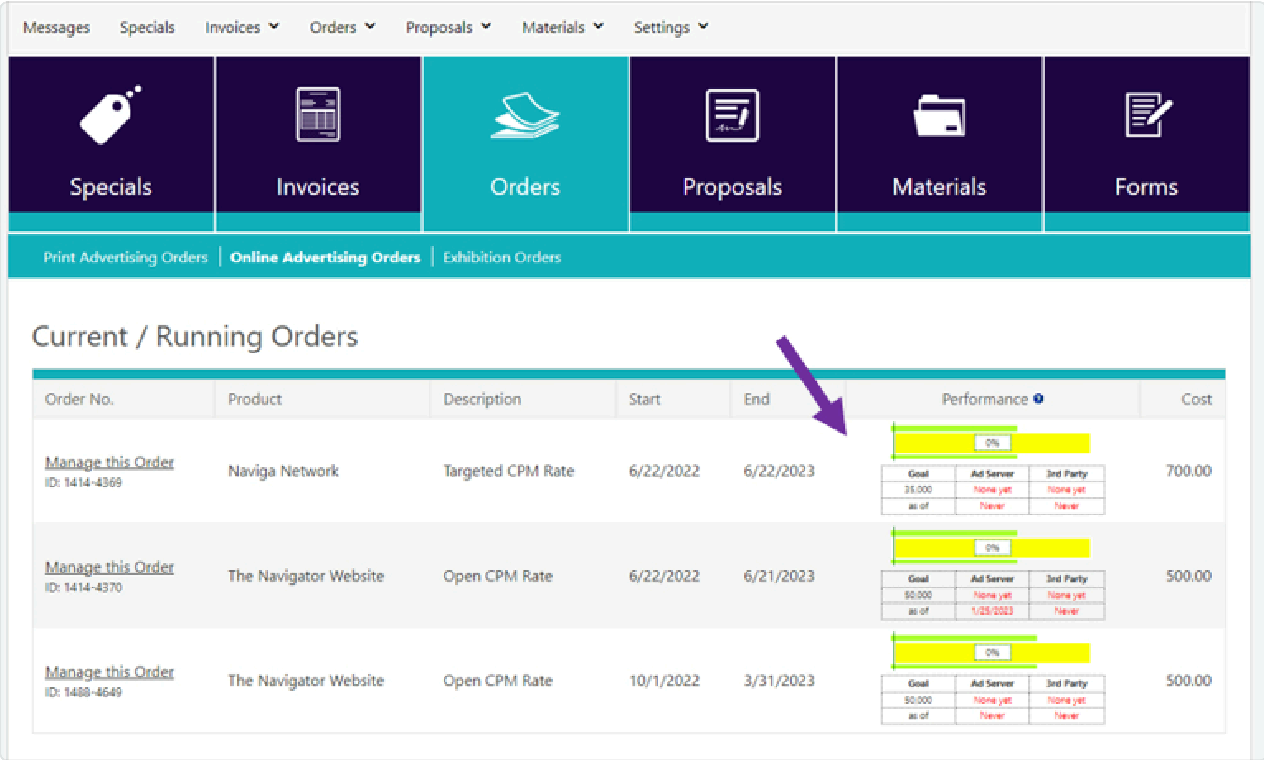
Oftentime the rep does not actually have access to the Name Maintenance screen though, so the infomation has now also been added to the CRM Account View Screen:



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.



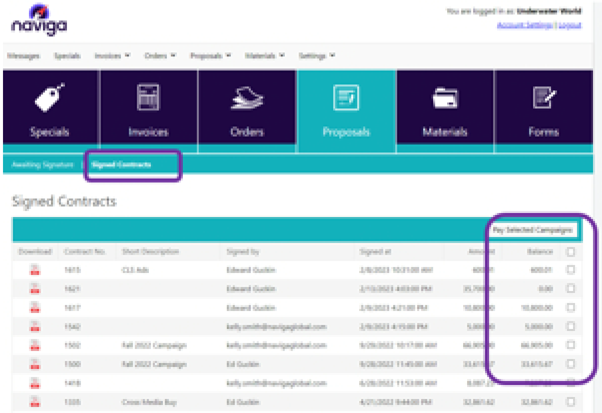
☑️ Prepay for Campaigns through the Advertiser Portal

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

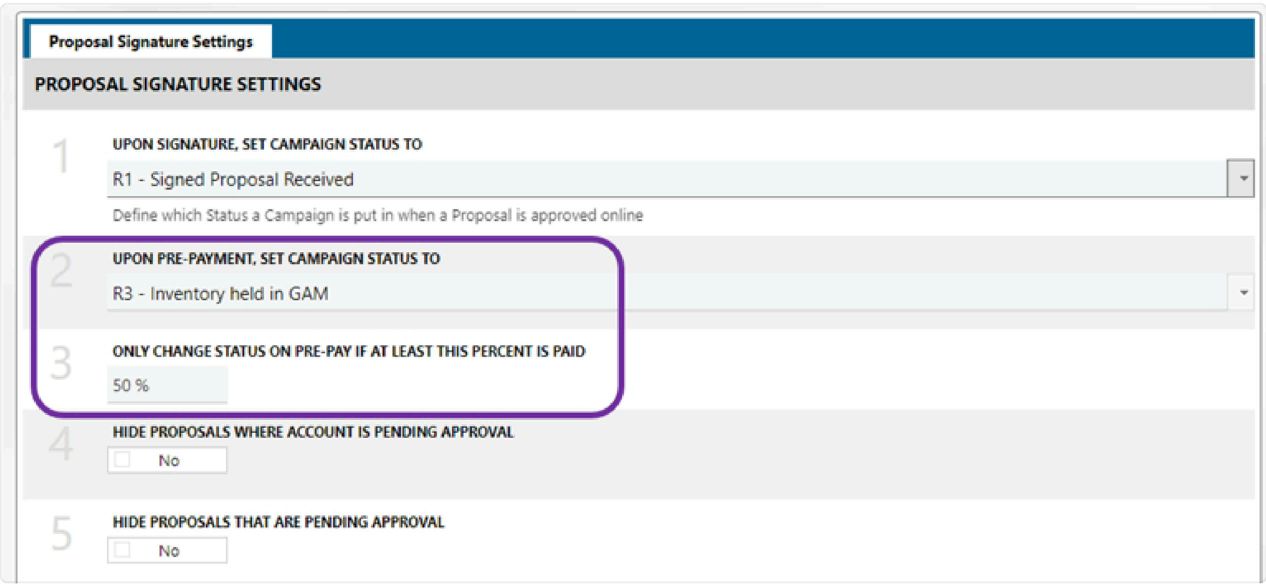
pay for. Note, once the campaign has started invoicing they won't be able to prepay for it on this screen, but they can go to the invoices screen and pay invoices there as they always have.



3. 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 alway 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.



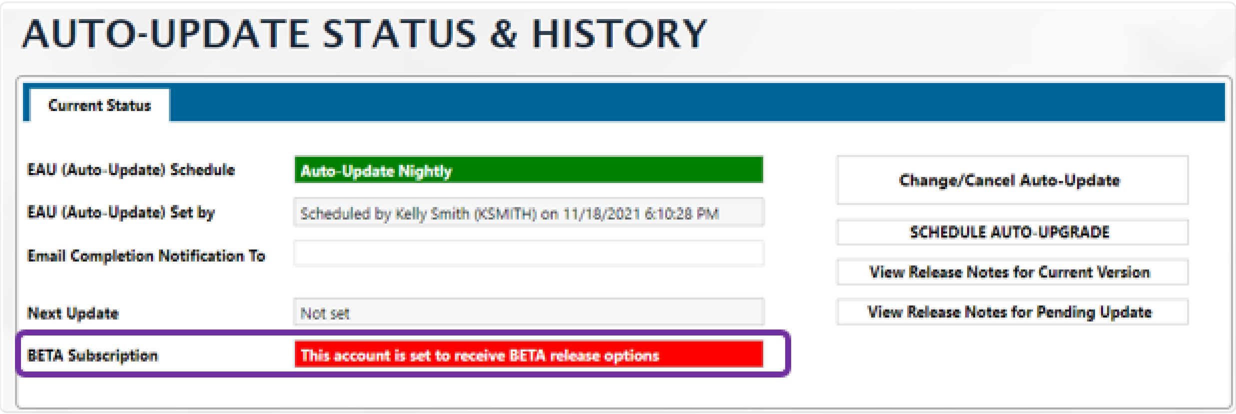
#2 - Setting #2 above allows you to set a different status after the order has been paid. For example, R1 might be your status after signing the proposal, but then once you pay for it, then it changes to R3 or CO perhaps.

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

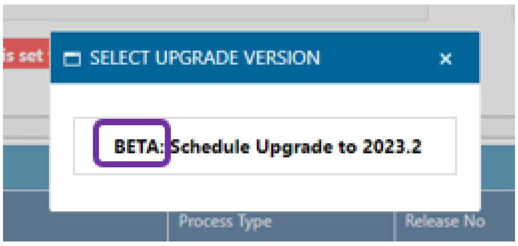
System Administration

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.