User Guide 2022.1

Table of Contents

User Guide 2022.1

Purpose

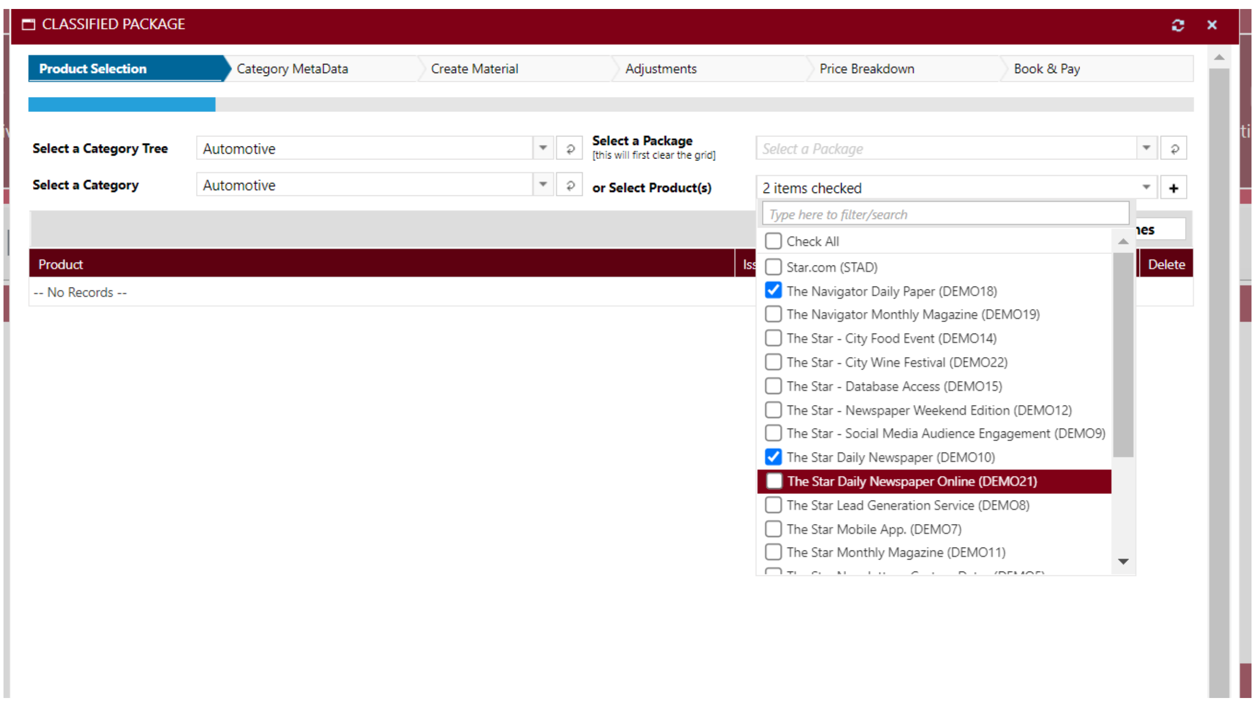
This document provides detailed steps of how to use the new features of the 2022.1 release. The document is organized by module.

Advertising Module

Classified Packages Pretax Price Override

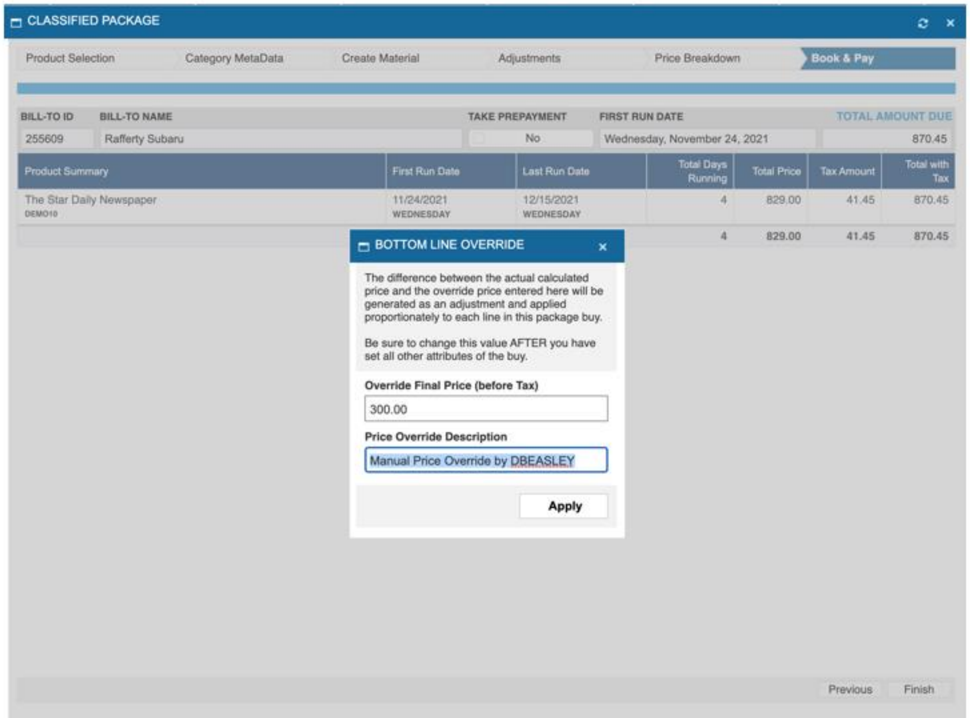
Classified packages line entry screen allows on the Book & Pay step of the process for the option to Override the Pre-Tax price.

Navigate to Campaigns -> Enter a new campaign and enter the header information of the campaign. In the line item entry, click the tab “Classified Packages”.



Choose multiple products from the “Select Product” drop-down menu. Once you click the + sign, a pop-up screen displays providing more dates options.

Enter the Start date for each of the lines, you can then leave “Specify Day Filter” blank to include all valid days of the week or click the drop-down and choose the day filter. Enter a numeric value for the Duration for Digital Lines and choose whether it is in months or days of how long the ad will run. When finished click “Apply”.



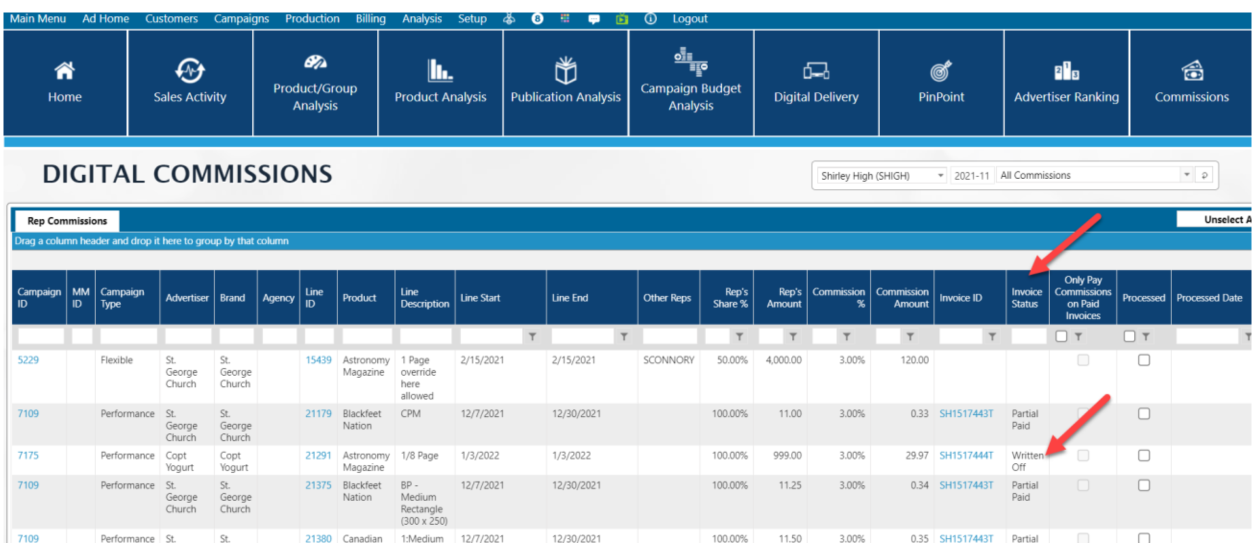
Proceed to the “Book & Pay” tab and the system allows for price override of the amount pre-tax.

Commissions Report Written Off Invoice

Salesrep Commissions Report displays whether invoice was written off in addition to paid full or partial status.

Navigate to the menu Analysis -> Commissions -> Commissions.

Search on the Salesrep and period.

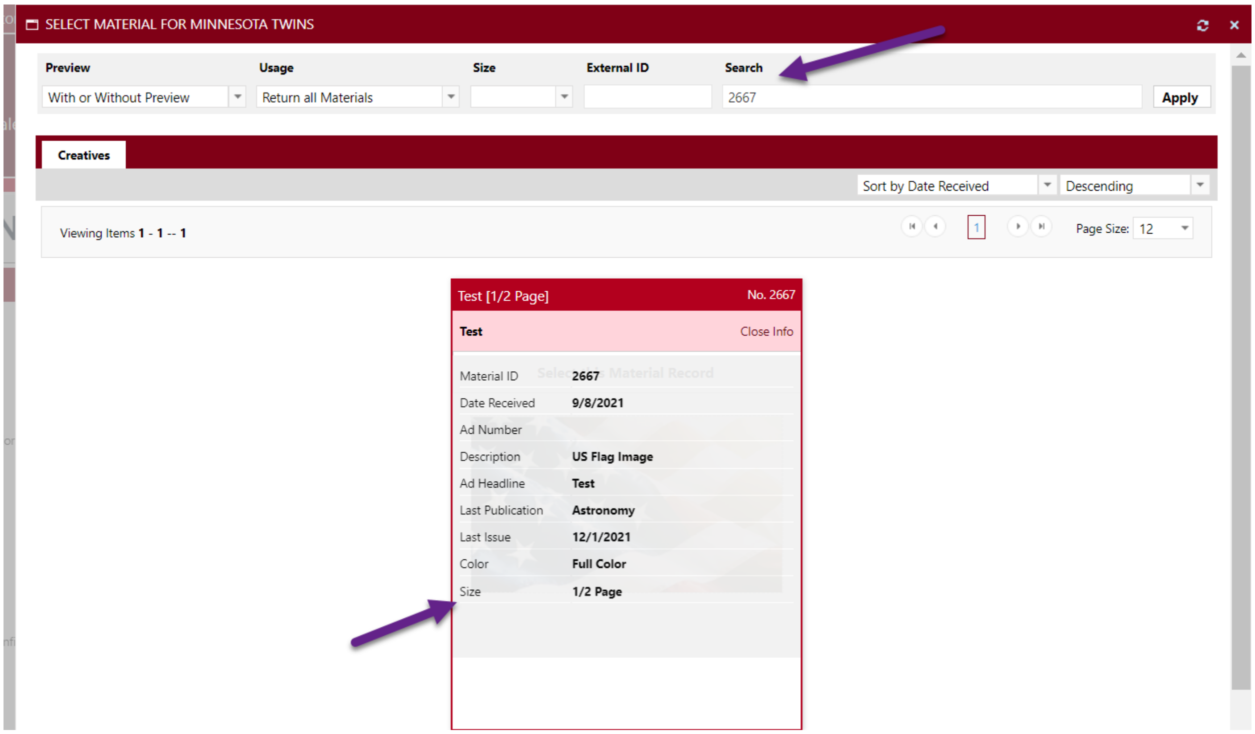


Note the Invoice Status column indicates the payment status including the “Written Off” status.

Material Search by Naviga ID and Quick Info Size Display

When attaching materials in a line item, user can search on materials using the Naviga Material ID as well as view the size in the Quick Info of the material list which displays in the search window.

Navigate to a campaign and edit the line of the campaign. Click the Materials tab.



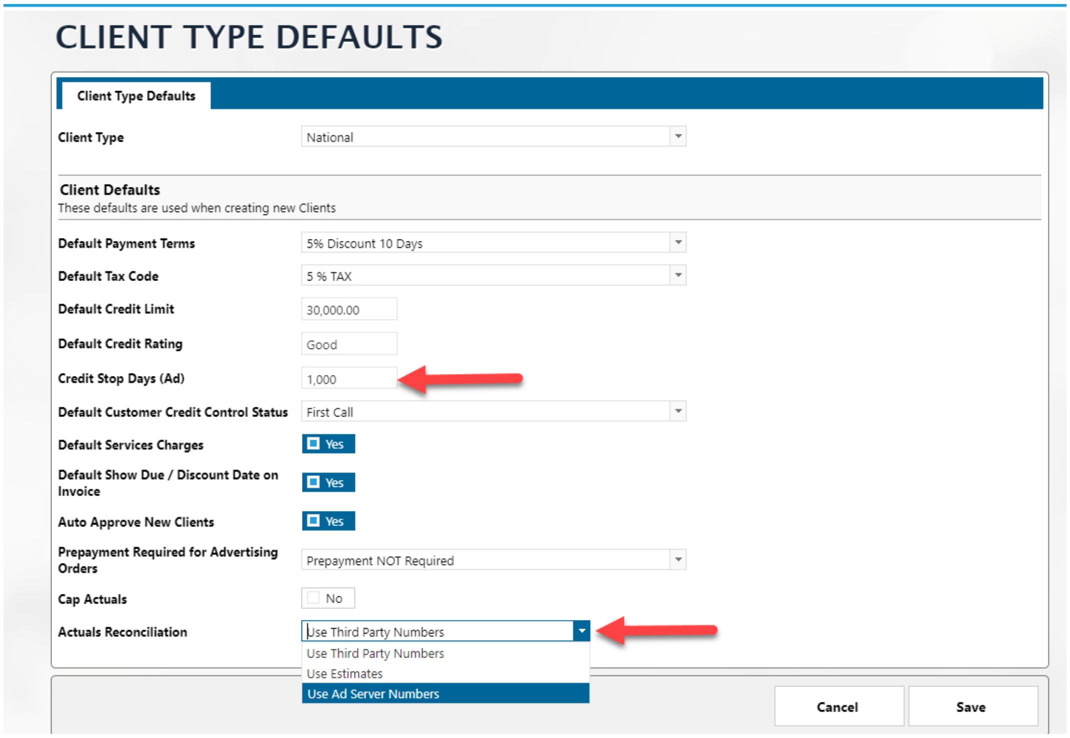
Enter the Material Naviga ID in the Search field and click Apply. The material displays.

Click the “Quick Info” button on the material and note that the size displays for all types including column inch sizes.

Defaults of Client Type

Client Defaults Setup has new fields for newly created clients of a type: 1. “Credit Stop Days (Ad)” which has the default number of days for all newly created clients of this type after which the client is placed on a Credit Stop automatically. These days are calculated based on unpaid invoices or confirmed campaigns exceeding the credit limit of the client. 2. Accounts Reconciliation: The actuals of the campaign are based on Estimates on the campaign itself, Third Party source, or Ad Server source. This default value is automatically applied to newly created clients of this type.

Navigate to the menu Setup -> Client Type Defaults. Choose a type of client from the drop-down menu.



Enter the details in applicable fields including the new fields of Credit Stop Days and the Actuals Reconciliation. Save the settings.

Navigate to the menu Customers -> Advertiser/ Agency Maintenance and create a new account with the type setup above. Note that the AR and Advertising Setup nodes on the account contain the default values in the new fields for this client type.

Tickets

New ticket feature on a line item allows users to enter a ticket and assign to another user for changes on the campaigns such as adding adjustments. User can choose Ticket Type, optionally choose who to assign it to, Priority and Status. There is also an area to describe why the credit is needed. This can be applied to all lines in a campaign or selected lines. There is also a history of the changes tab to track its history.

Ticket Type Setup

This allows you to setup various types of tickets by which you can group the ticket(s) on the campaign.

Navigate to the menu Setup -> Advertising Setup -> Ticket Type setup. Create the ID and description of the ticket type(s) and save.

Tickets Status Code

This allows you to assign a status code to the ticket on the campaign in an informative way to report on later on and manage the tickets.

Click the node “Tickets Status Code” and add a new status ID and description. You can choose to select the “Complete” status for any of the statuses listed to indicate completion of action requested in reports.

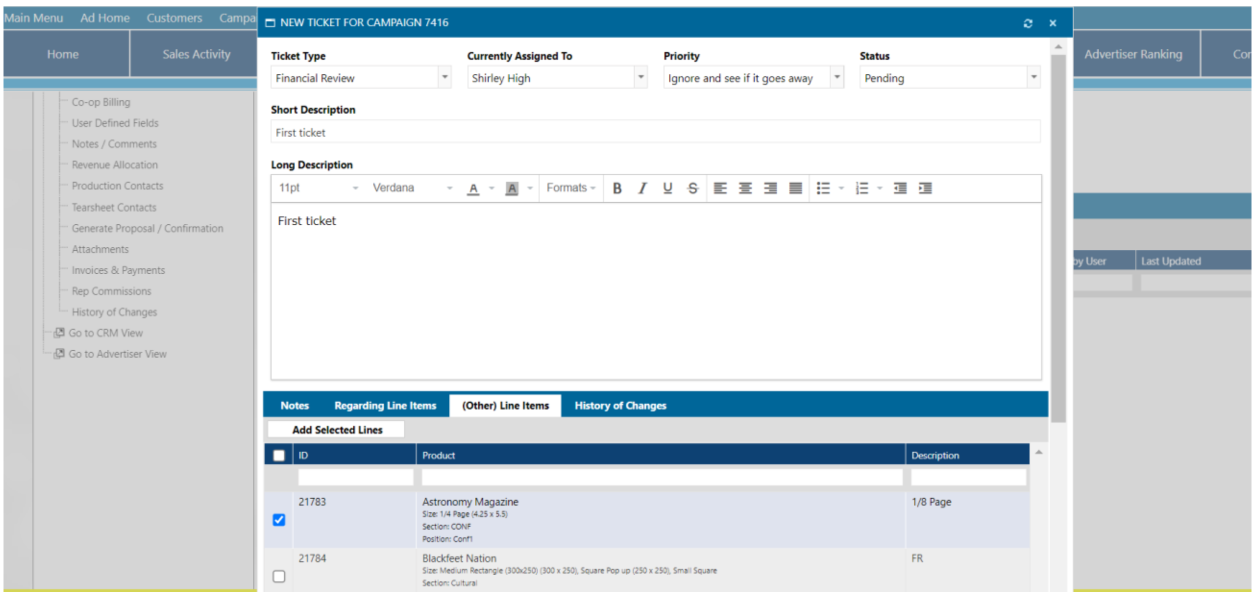
Tickets Priorities

This section allows you to setup priorities which you can assign a ticket to in the campaign so that the assignee would act based on the priority.

Add the ID and description of the priority and save the settings.

Create Ticket

Navigate to create a new campaign with multiple lines. Click the tab “Tickets”. Click “New Ticket”.



Select the Ticket Type, the person it’s assigned to, priority and status. You can also enter descriptions for the ticket as notes to the person assigned the ticket. The list of assignees is a list of users in the system.

Check the box or multiple boxes for the lines regarding which you’d like the assignee to take an action. You must then click “Add Selected Lines”. Save the ticket.

The ticket now has an ID which you can click and edit and add notes to it.

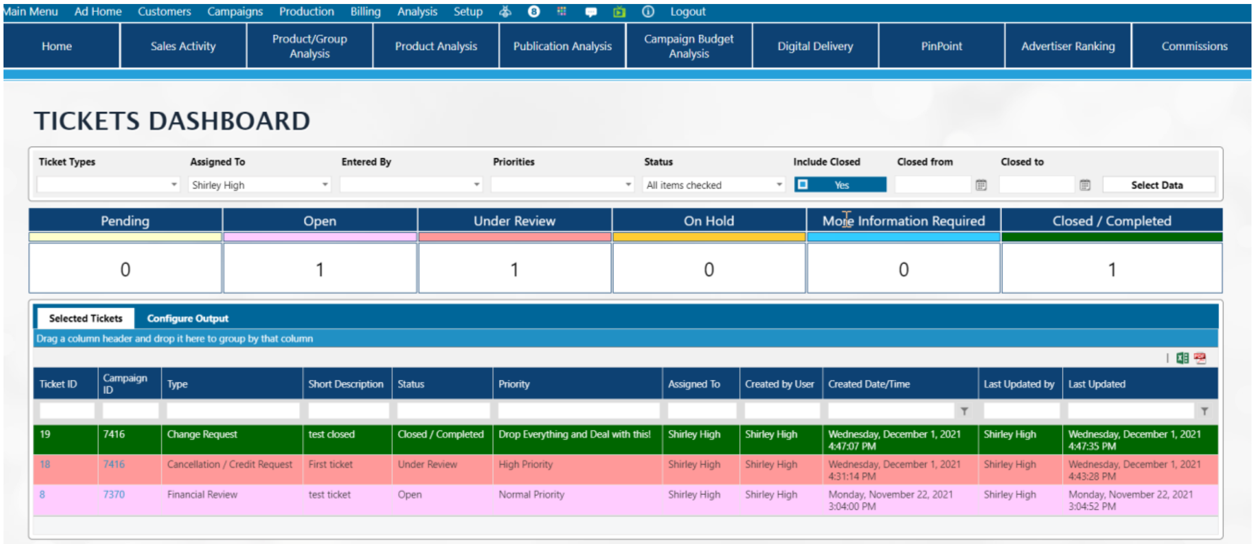
The lines left unchecked display under the “(Other) Line Items” tab. The checked items which require the attention of the assignee are under the tab “Regarding Line Items”.

You can view the changes made to the ticket under the tab history of changes. You can also add more lines to the ticket or remove them and edit the status and details of the ticket.

Tickets Dashboard

This menu allows you searching on the tickets.

Navigate to the menu Campaigns -> Tickets Dashboard.



Search by the various fields available. Click the “Configure Output” and choose the fields to view in the report.

You can click the Ticket ID and edit the ticket and the updates display on the screen. The colors displayed are the ones reflected from the ticket status.

Once a user is assigned the ticket, this user will be notified by email of the assignment and any changes made to the ticket.

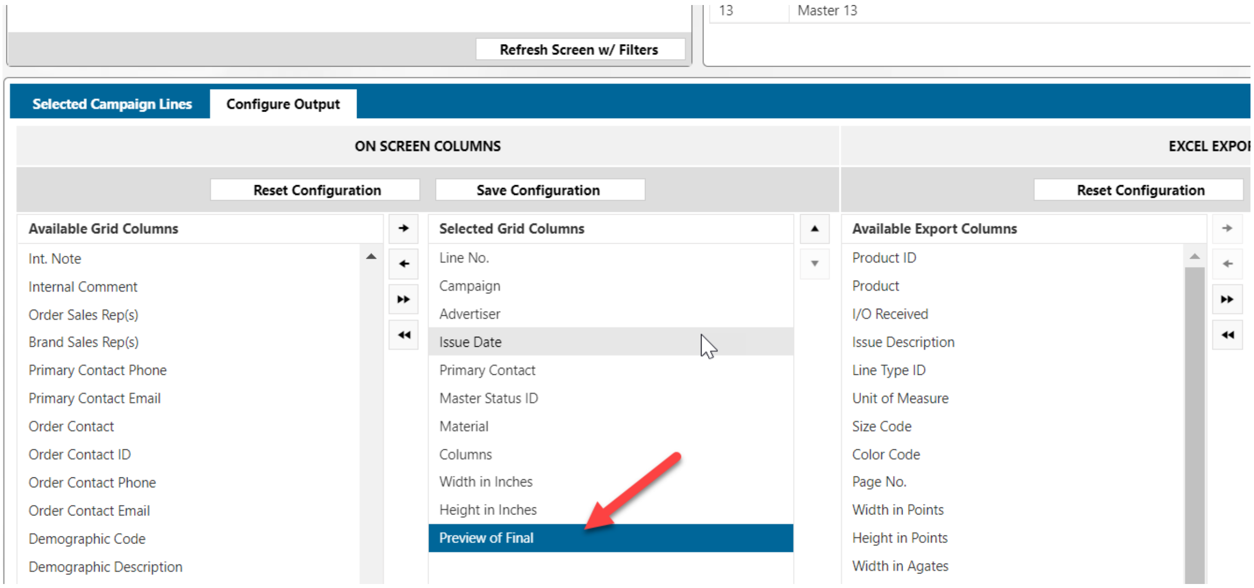
The intent for “Include Closed” flag is to be used when there aren’t any statuses selected. If run with no status filters it will not include the “Closed” statuses by default.

Print Product Production Configurable Fields

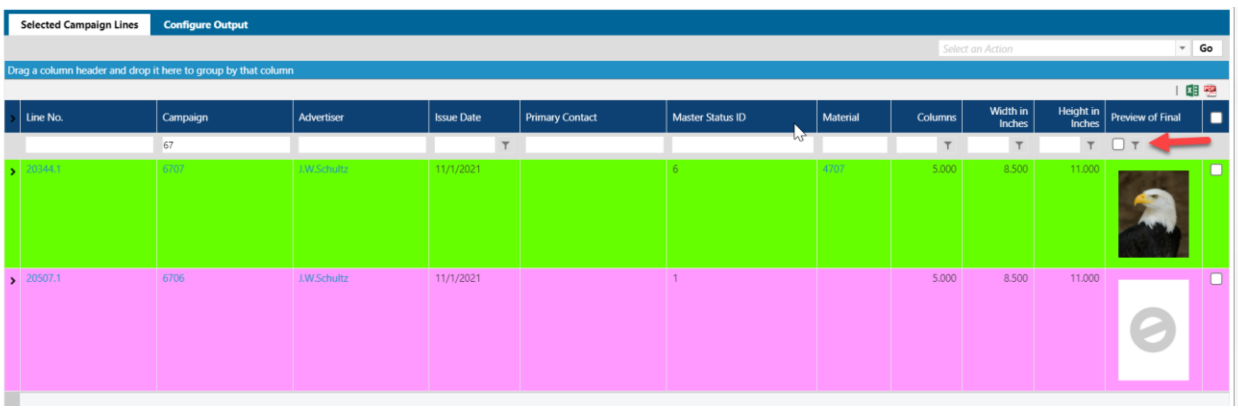
Print Product Production Report contains multiple new fields and one of which is “Preview of final” which provides a thumbnail image of the final image attached to the order. If the image isn’t final it will not display. It also has the Campaign Description to move over to the available fields displayed.

Navigate to the menu Production -> Production by Product (Print) and run the query on the product.

Scroll to the “Configure Output” tab and click it. Then click the field “Preview of Final” to move it to the Selected Grid Columns and save the configuration.



Click the “Selected Campaign Lines” tab.

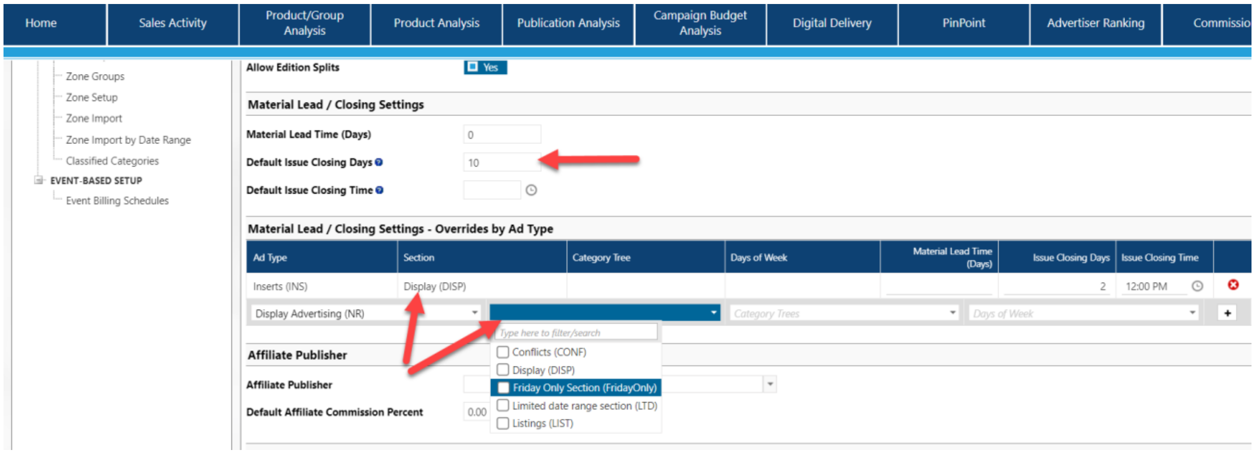


The lines with final images display the image as a thumbnail while others don’t. You can also filter on the field and select the ones Equal To as the ones with final preview.

Close Date Override by Section

Product issue close date screen allows for section specific to override the general issue close date.

Navigate to the menu Setup -> Product Setup -> Product Details. Choose the product from the drop-down menu. Scroll to the Material Lead/ Closing settings – Override section.



In the blank fields select the Ad Type, Section, and days and time to override the “Default Issue Closing Days”. Save the settings.

Navigate to create a campaign for this product in a closed issue according to the default value but using the Ad Type and Section in the override section.

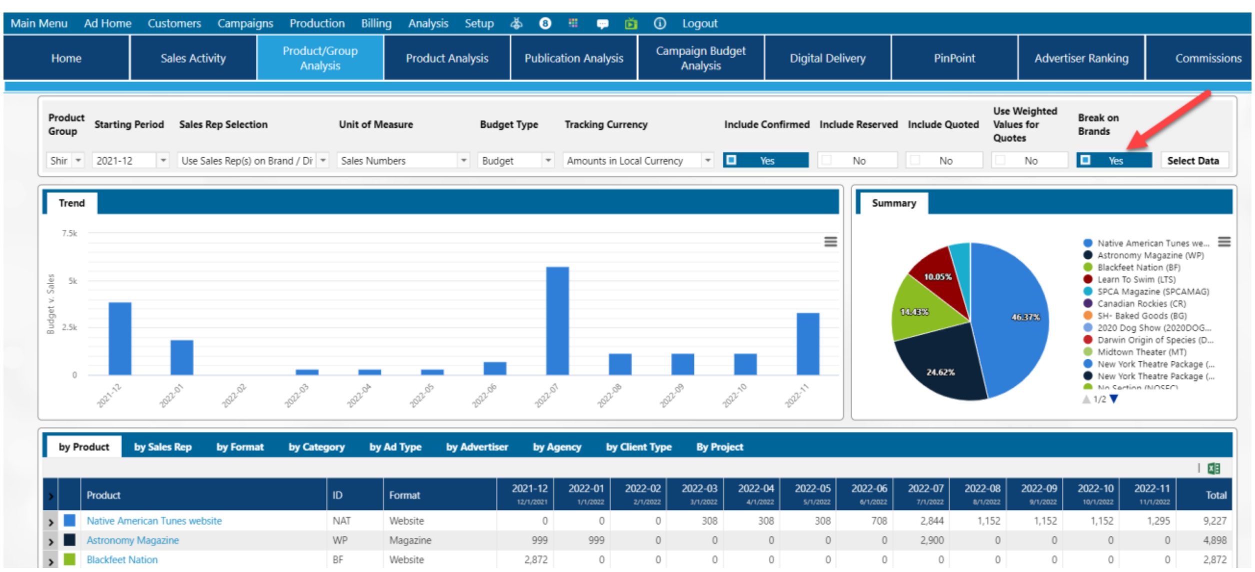
When creating the line item, the system displays the issues up to the override number of days before the issue closes.

Create a line item which doesn’t fulfill the section listed in the override, and the system allows you to create the line for the issue.

Group Analysis by Brand

Product Group Analysis has a new ability to group results by brand.

Navigate to the Advertising module and click the menu tile “Product/ Group Analysis”. Enter the criteria to search on and click the button “Break on Brands”.

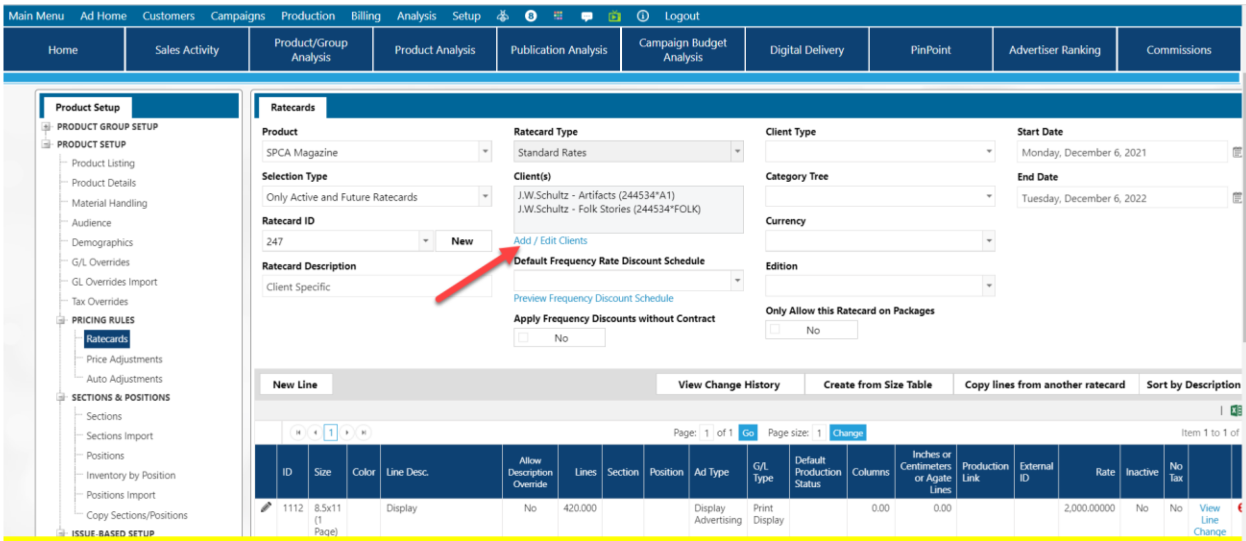


Click the Advertiser results tab. The results display grouped by brand.

Ratecard Agency/Client – Brand

Ratecards allow for tying the rates to a client/ agency/ brand combination.

Navigate to the menu Setup -> Product Setup -> Ratecards and select a product from the drop-down menu. Create a new or edit an existing Ratecard with the lines needed. Click the drop-down menu of the “Client(s)” to “Add/ Edit Clients.”



Select the client from the Client drop-down menu and note the new field “Brand”. Select the brand which can be a standalone brand or a brand which is tied to an agency. Save and the Client – Brand combination displays in the Ratecard “Clients” field. There can be more than one client-brand selection in this field. Save the Ratecard.

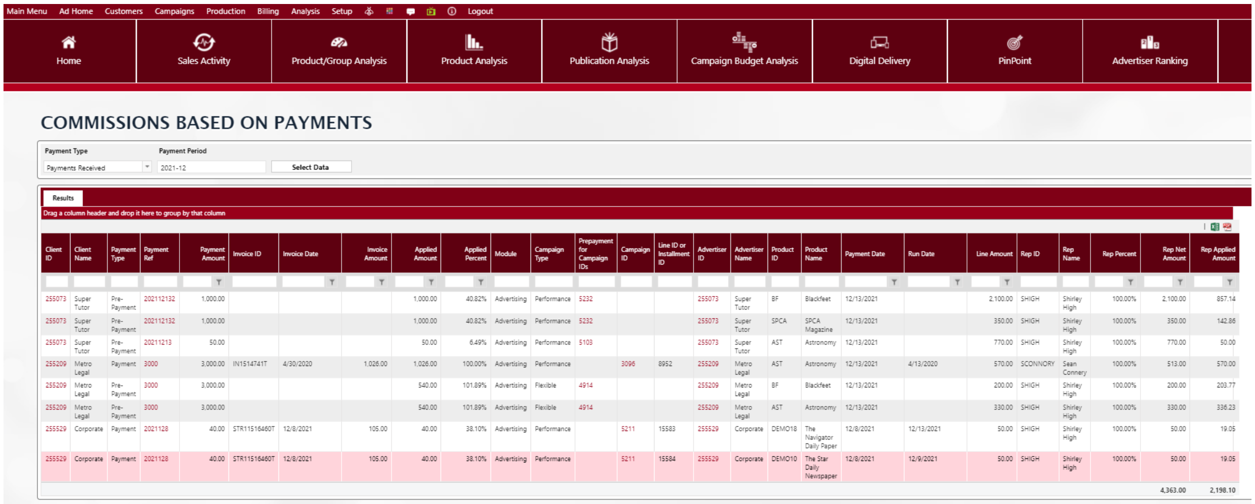
Proceed to create a full line entry or quick line entry display or classified or classified package for this agency-brand combination as you normally would. The system displays the Ratecard you have setup above for this purpose. Note that you can also use this Ratecard in the Opportunities on the CRM side.

Commissions Based on Payments Report

Commissions report based on campaign payment is now based on either Received Payment or Applied Payment. It displays various columns related to the prepayments and payments affecting the Salesrep’s commission. In Flexible Campaigns where the payments could be a percentage of the invoice, payments will be allocated to products based on the total allocation of revenue on the campaign.

Create a campaign and enter a prepayment on the campaign. Also, process billing and payments for other campaigns in a select period.

Navigate to the menu Analysis -> Commissions -> Commissions Based on Payments. Select the period to which the payment is applied and select the payment type whether it is applied date based on billing or payment received based on date payment was made.

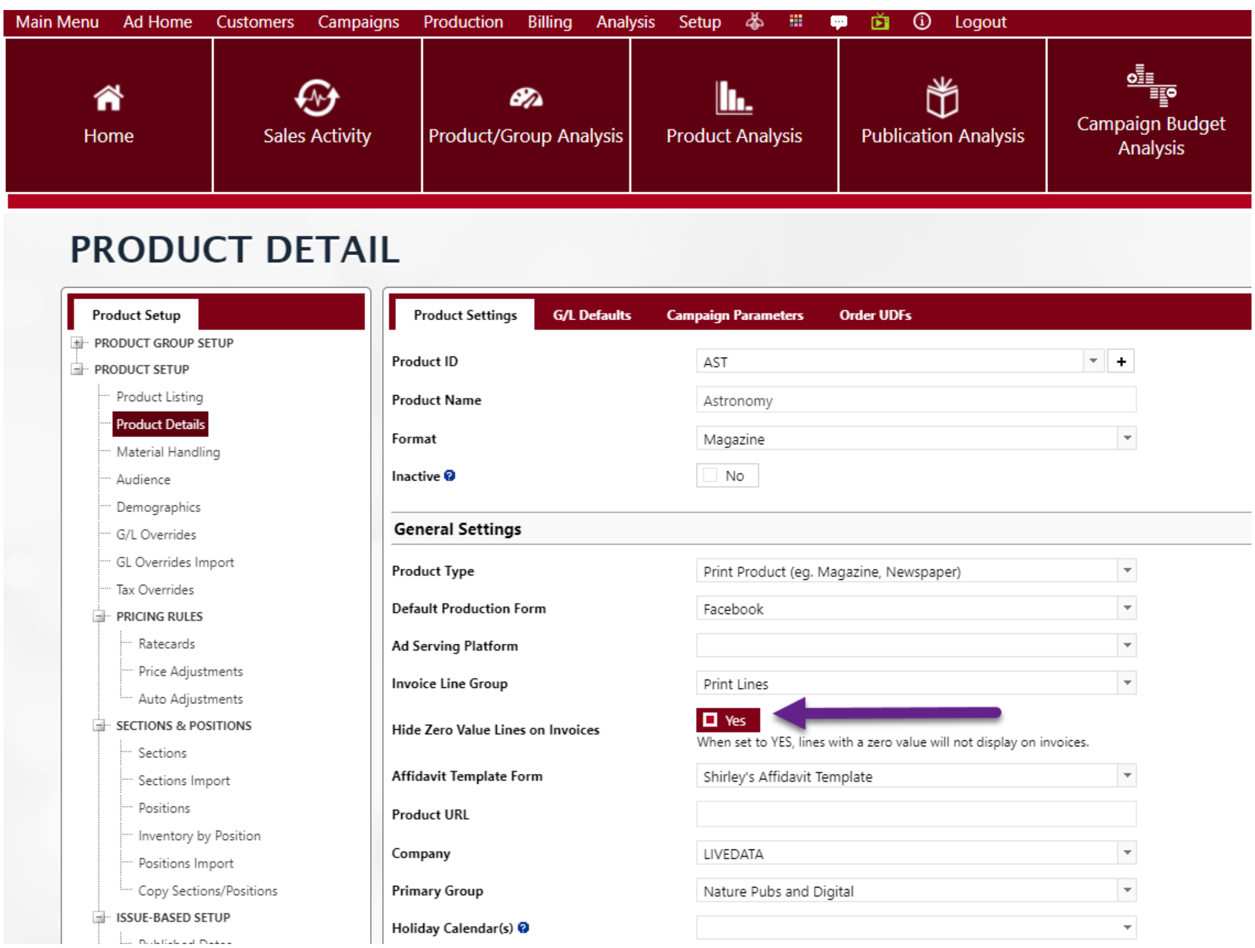


The details of the payments you've made are displayed.

Zero Invoice Line Suppressed on a Product

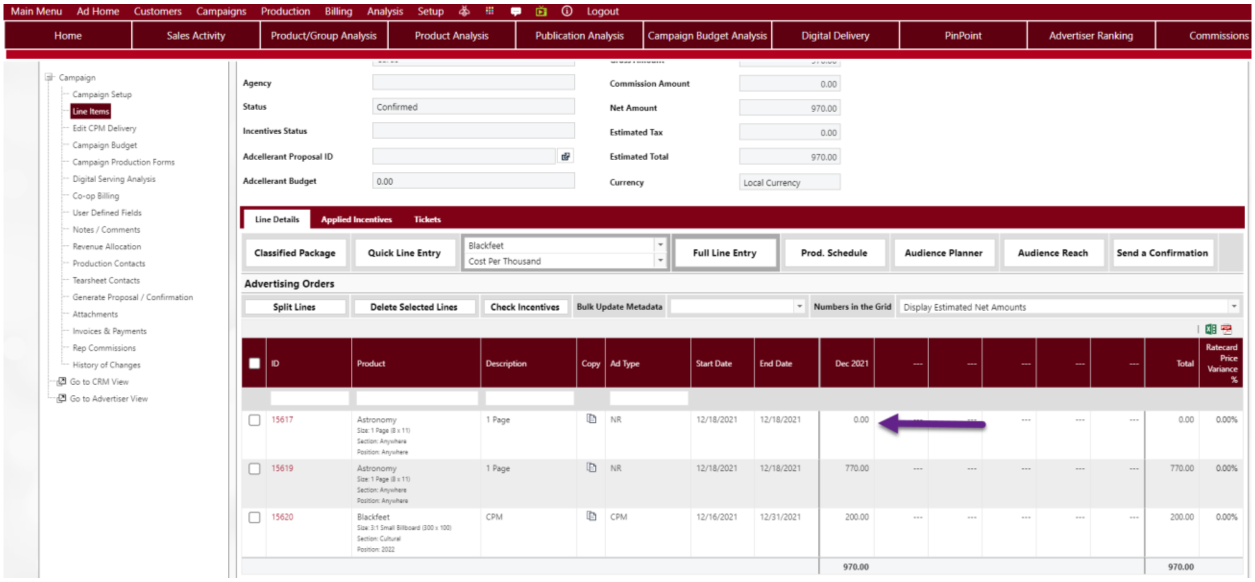
New field in the Product Setup screen allows for suppressing zero lines on an invoice.

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

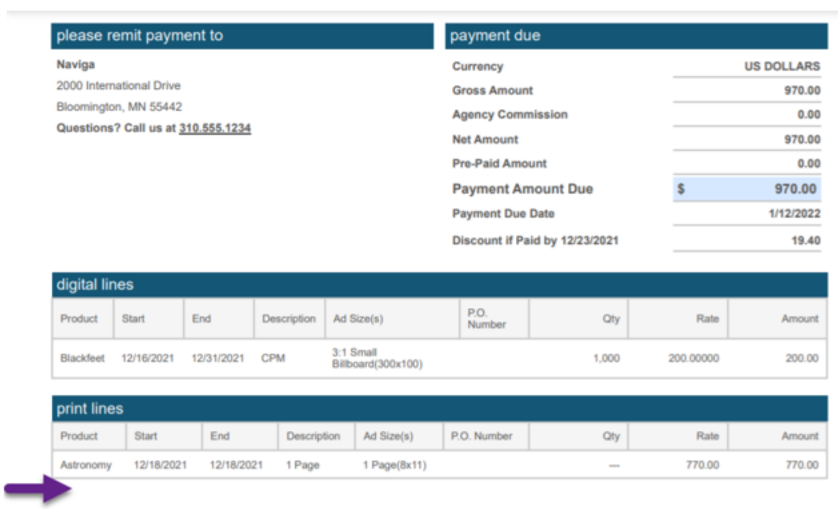


Check the flag “Hide Zero Value Lines on Invoices” to change its value is “Yes”. Click the save.

Create a campaign with two lines, one with value in the amount and one with zero value.



Process the billing for this campaign from the Billing menu. Note the invoice has only the lines with values and the zero line for the product as per the setup isn’t visible.


please remit payment to

Naviga
2000 International Drive
Bloomington, MN 55442
Questions? Call us at 310.555.1234

payment due

Currency	US DOLLARS
Gross Amount	970.00
Agency Commission	0.00
Net Amount	970.00
Pre-Paid Amount	0.00
Payment Amount Due	$ 970.00
Payment Due Date	1/12/2022
Discount if Paid by 12/23/2021	19.40

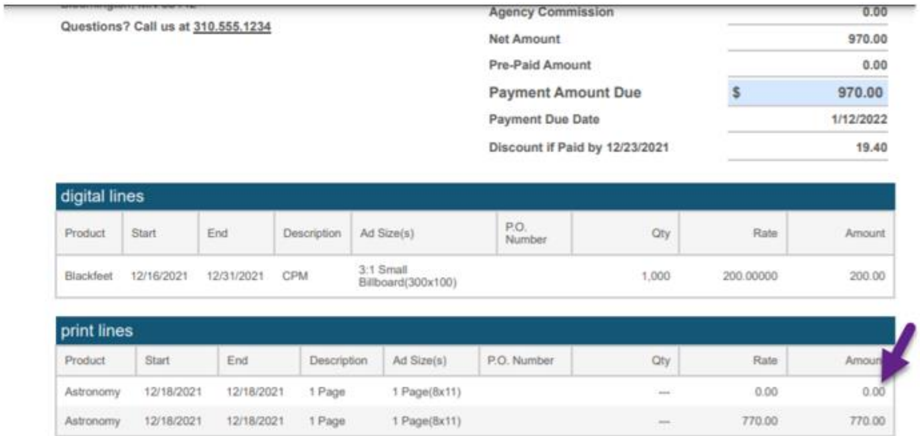
digital lines

Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Blackfeet	12/16/2021	12/31/2021	CPM	3:1 Small Billboard(300x100)		1,000	200.00000	200.00

print lines

Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Astronomy	12/18/2021	12/18/2021	1 Page	1 Page(8x11)		---	770.00	770.00

If the flag is unchecked on the product setup, the invoice displays all lines regardless of zero values.



Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Blackfeet	12/16/2021	12/31/2021	CPM	3:1 Small Billboard(300x100)		1,000	200.00000	200.00

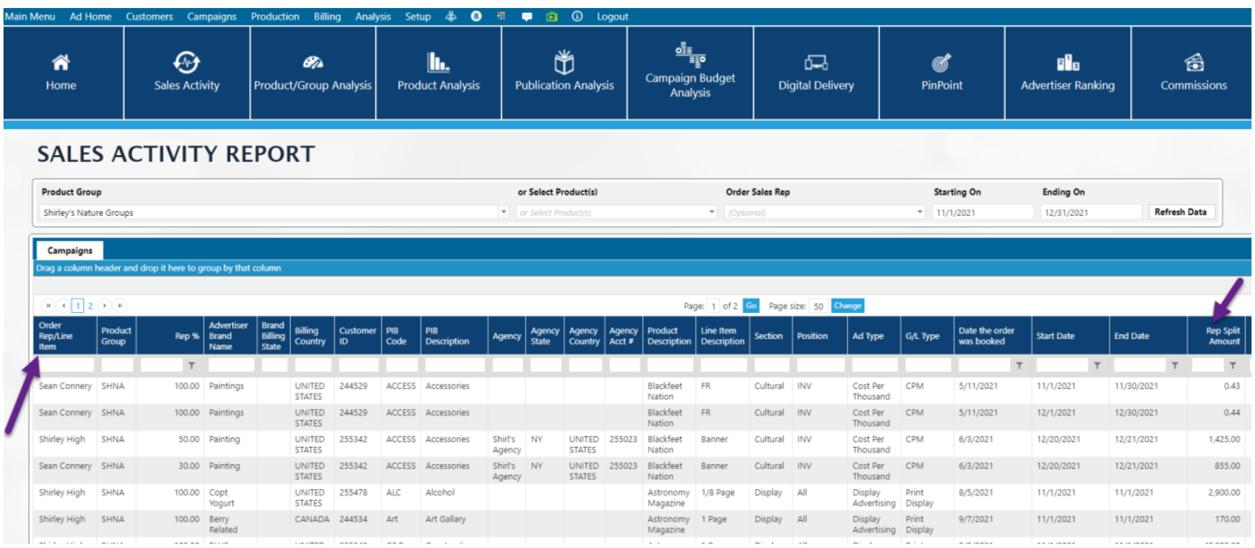
Product	Start	End	Description	Ad Size(s)	P.O. Number	Qty	Rate	Amount
Astronomy	12/18/2021	12/18/2021	1 Page	1 Page(8x11)		—	0.00	0.00
Astronomy	12/18/2021	12/18/2021	1 Page	1 Page(8x11)		—	770.00	770.00

The invoice can be split by products.

Salesrep Activity Report

New report to display Salesreps activity by product or product group.

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



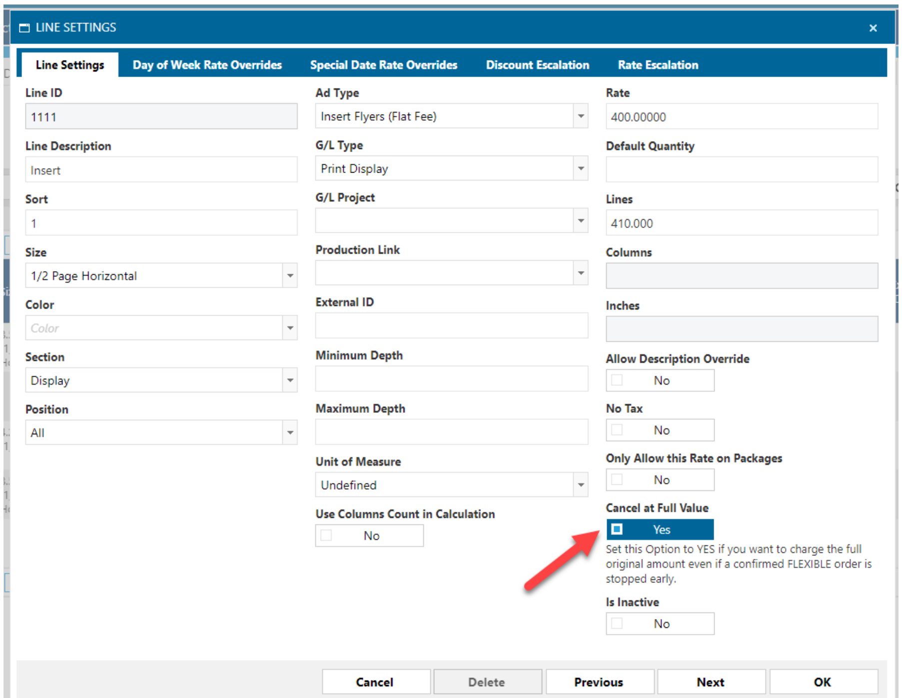
Order Rep/Line Item	Product Group	Rep %	Advertiser Brand Name	Brand Billing State	Billing Country	Customer ID	PIB Code	PIB Description	Agency	Agency State	Agency Country	Agency Acct #	Product Description	Line Item Description	Section	Position	Ad Type	G/L Type	Date the order was booked	Start Date	End Date	Rep Split Amount
Sean Connery	SHNA	100.00	Paintings		UNITED STATES	244529	ACCESS	Accessories					Blackfeet Nation	FR	Cultural	INV	Cost Per Thousand	CPM	5/11/2021	11/1/2021	11/30/2021	0.43
Sean Connery	SHNA	100.00	Paintings		UNITED STATES	244529	ACCESS	Accessories					Blackfeet Nation	FR	Cultural	INV	Cost Per Thousand	CPM	5/11/2021	12/1/2021	12/30/2021	0.44
Shirley High	SHNA	50.00	Painting		UNITED STATES	255342	ACCESS	Accessories	Shirl's Agency	NY	UNITED STATES	255023	Blackfeet Nation	Banner	Cultural	INV	Cost Per Thousand	CPM	6/3/2021	12/20/2021	12/21/2021	1,425.00
Sean Connery	SHNA	30.00	Painting		UNITED STATES	255342	ACCESS	Accessories	Shirl's Agency	NY	UNITED STATES	255023	Blackfeet Nation	Banner	Cultural	INV	Cost Per Thousand	CPM	6/3/2021	12/20/2021	12/21/2021	855.00
Shirley High	SHNA	100.00	Copt Yogurt		UNITED STATES	255478	ALC	Alcohol					Astronomy Magazine	1/8 Page	Display	All	Display Advertising	Print Display	8/5/2021	11/1/2021	11/1/2021	2,900.00
Shirley High	SHNA	100.00	Berry Related		CANADA	244534	Art	Art Gallary					Astronomy Magazine	1 Page	Display	All	Display Advertising	Print Display	9/7/2021	11/1/2021	11/1/2021	170.00

Choose the product group or product and date range. The data displayed is split by Salesrep and provides the line item data including the Salesrep split.

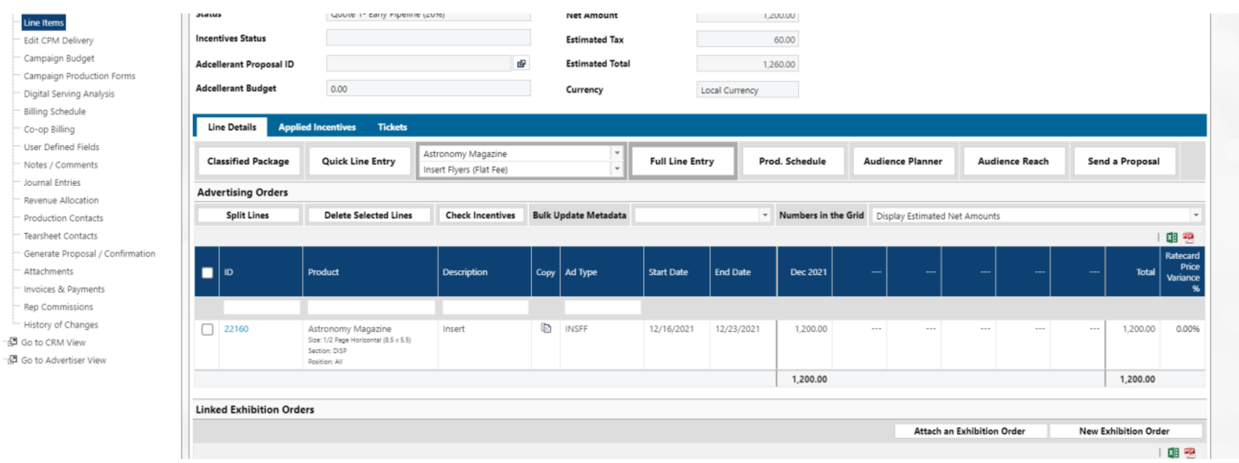
Cancel at Full Value

Ability for a user to cancel a running ad across multiple dates which an advertiser would like to cancel after running in initial issues while allowing the addition of the revenue to the last issue which ran so that user doesn't lose revenue. This is applicable to all ad types and only on flexible campaigns and done through the Ratecard line flag "Cancel at Full Value". For example, if an advertiser doesn't want his ad to continue running for future dates, to avoid receiving inquiries for something that has already been sold or for any reason. But the publication wants the advertiser to pay the full price, even though the advertiser is reducing the days of the ad.

Navigate to the menu Setup -> Product Setup -> Ratecards. Choose a line and check the flag on the line "Cancel at Full Value". Save the line and the Ratecard.

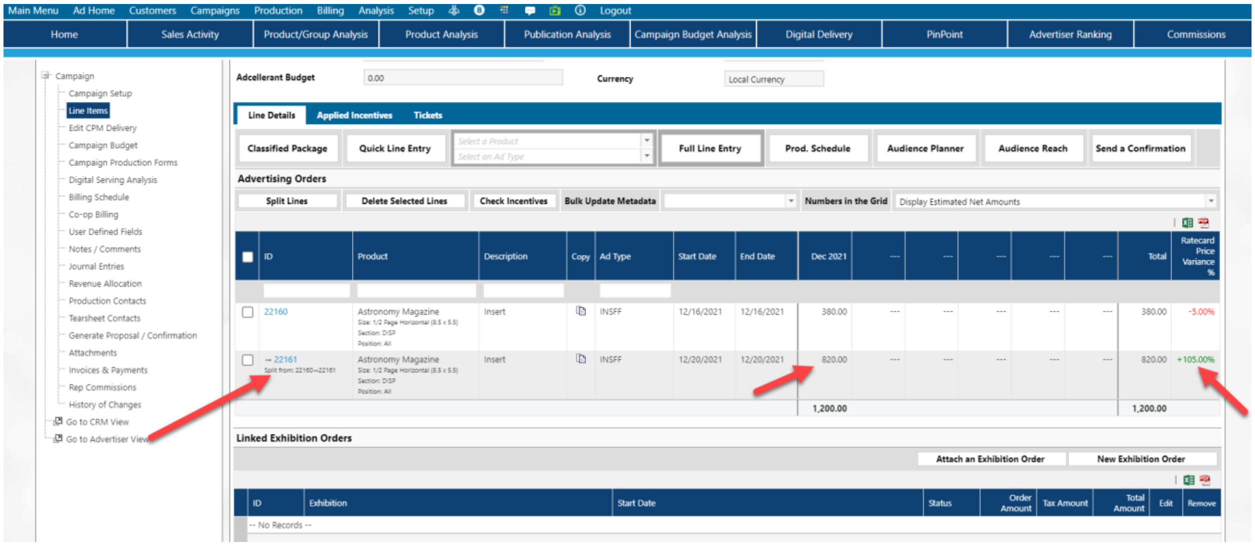


Create a flexible campaign using the Ratecard line above and create 2 or more dates in the line. Save. Confirm the campaign.



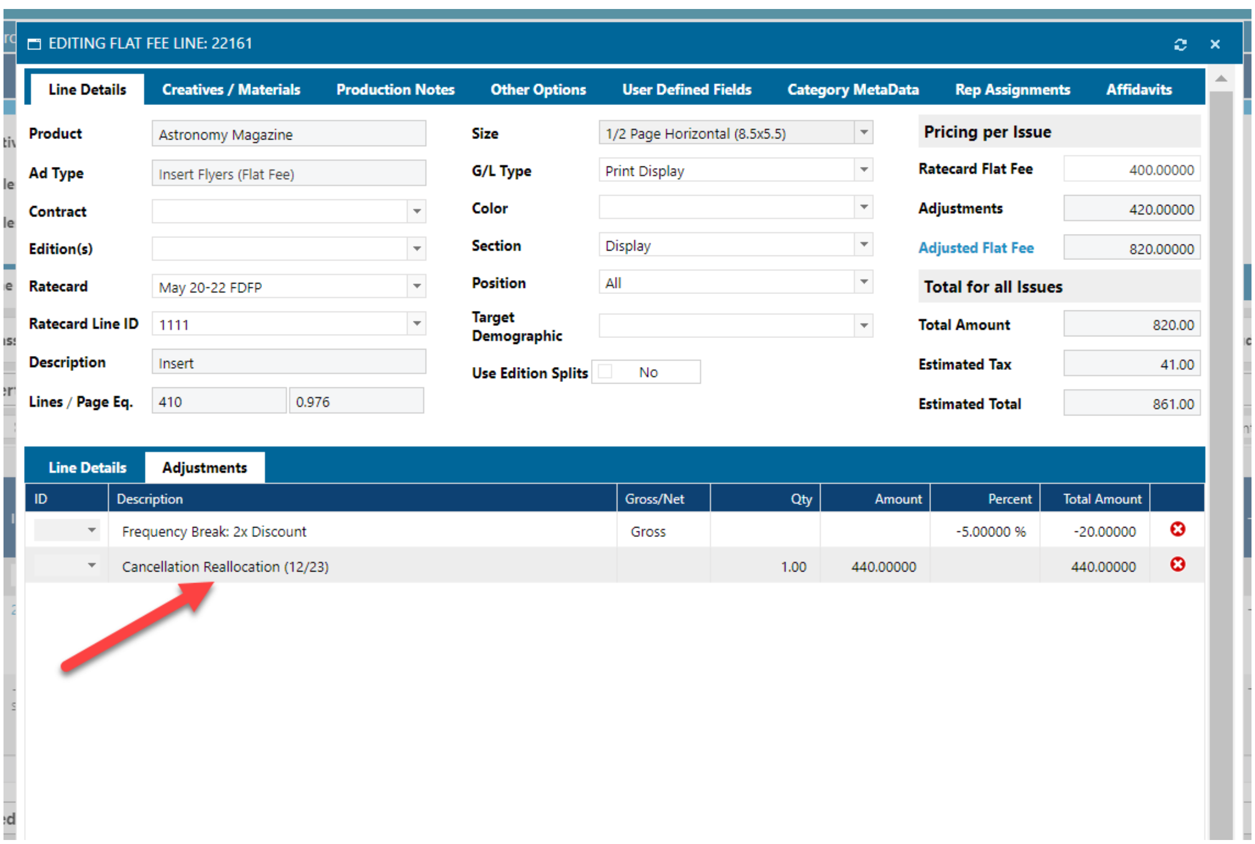
You can bill the campaign or leave as just confirmed.

Return to the campaign and edit the line and remove the last issue. Save the campaign.



Note that the last running issue is now split and includes the amount from the line you deleted. The adjustment at the right side of the line shows +100% added from the deleted line.

Click the split line and click the “Adjustments” tab.



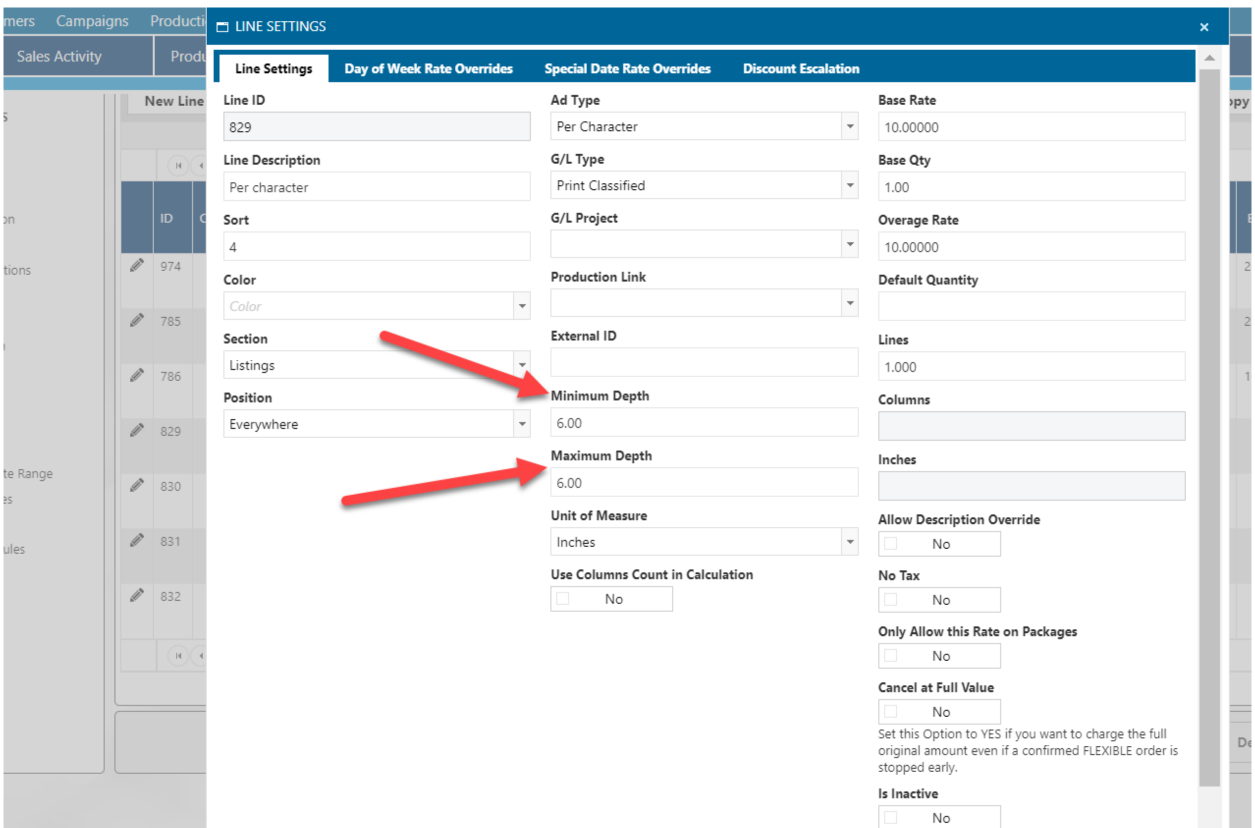
Note that the amount added to the line from the cancelled line is listed with the explanation of the issue date cancelled and the quantity as well as the amount. Other adjustments for any other reasons are listed in separate lines.

Minimum and Maximum Depth (Height) Ratecard Line

Ratecard lines on Ratecards for the cost per ads allow user to set a minimum and maximum height for the ad in order to control the entry of ads using this Ratecard line by dimension. This would be beneficial if an advertiser desires to get a better rate using a classified ad type for placing an ad which in reality should be a display ad. In this case setting the size limitation would give users control over the pricing of the ad to be appropriate for the ad entered.

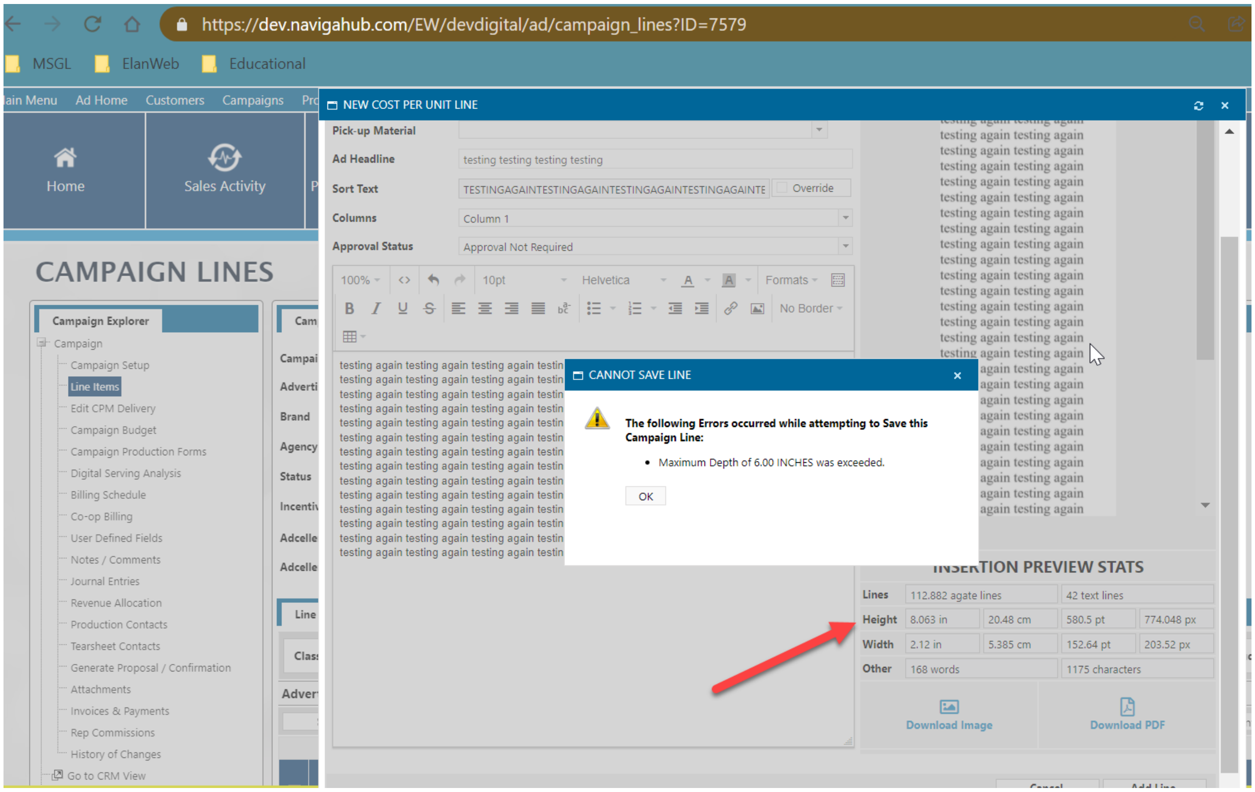
Navigate to the menu Setup -> Product Setup -> Ratecards and choose a product from the drop-down menu which would have a cost per Ad Type as an option in a Ratecard.

Choose the line, for example a Cost Per Character Ratecard Line.



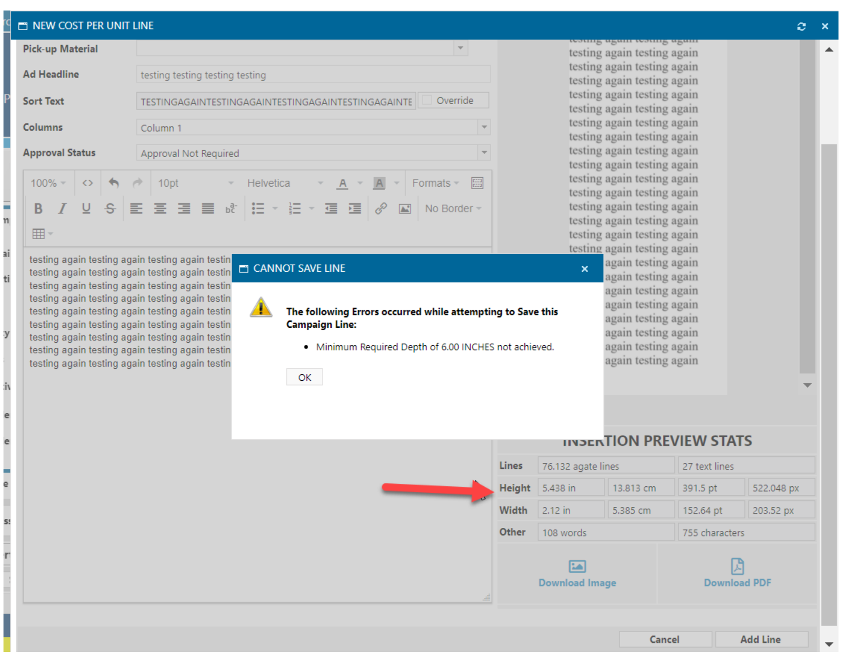
Enter a Minimum Depth if you'd like to allow for a minimum size AD and a Maximum Depth if you'd like to limit the AD size. Save the line and then save the Ratecard.

Navigate to create a campaign using this Ratecard line. Enter number of characters which exceed the maximum or less than the minimum height of the settings.

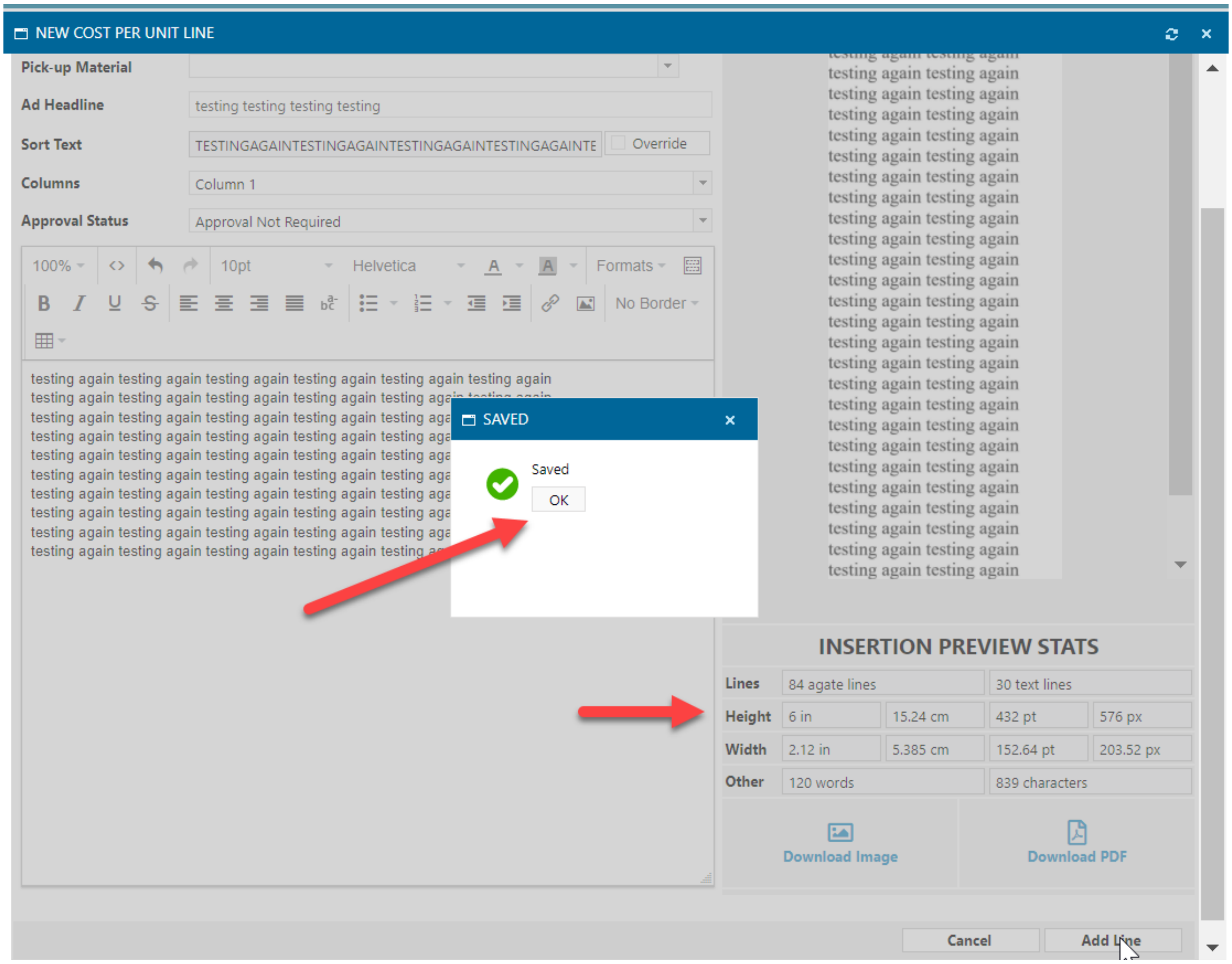


Note the Height of the AD dimension in the preview stats window and note that it exceeds the allowed depth. Click "Create Line" and the system won't allow you to create the ad with the error message as to why. In this case the depth exceeds the setting on the Ratecard line.

The same happens if you enter characters less than the minimum allowed.



Enter the exact depth as setup.



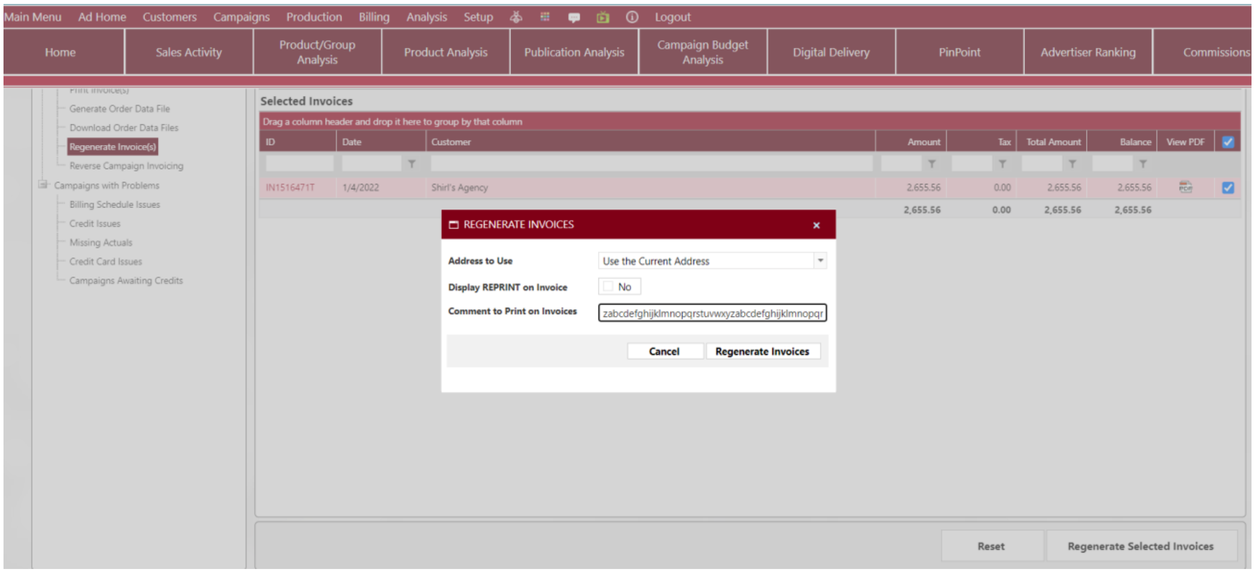
The system allows you to save the line when you click “Add Line”.

This also applies to the Display Ad Type of Column per Inch for example, as the Column x Inch where the Inch is defining the depth (height) on the Ad line.

Regenerate Billing Comments

In the “Regenerate Invoice” screen, the comments field length is extended from 50 to 200 characters to allow for longer comments.

Navigate to the menu Billing -> Campaign Billing -> Campaign Billing -> Regenerate Invoices. Enter the invoice ID to generate.

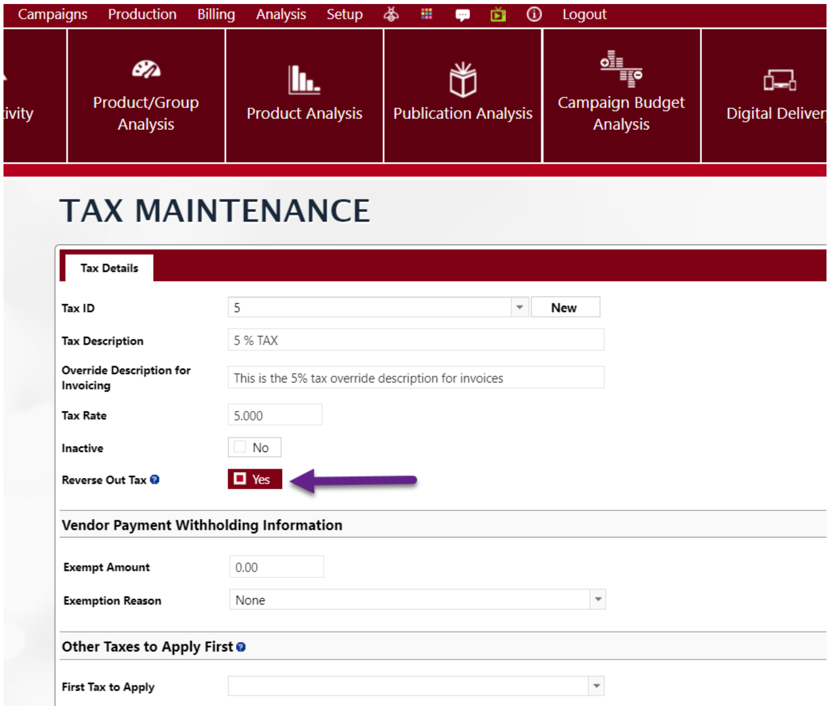


In the field “Comment to Print on Invoices”. You can enter a comment up to 200 characters. Click “Regenerate Invoices”.

Reversed Tax

Tax Maintenance allows for reversing a tax amount. This is used in countries which allow for not charging clients taxes but still need to display the tax amount on invoices. There is an HTML field in invoices #REVERSE_TAX_AMOUNT# which displays the reversed tax amount. The total amount on the invoice won’t include the reversed tax.

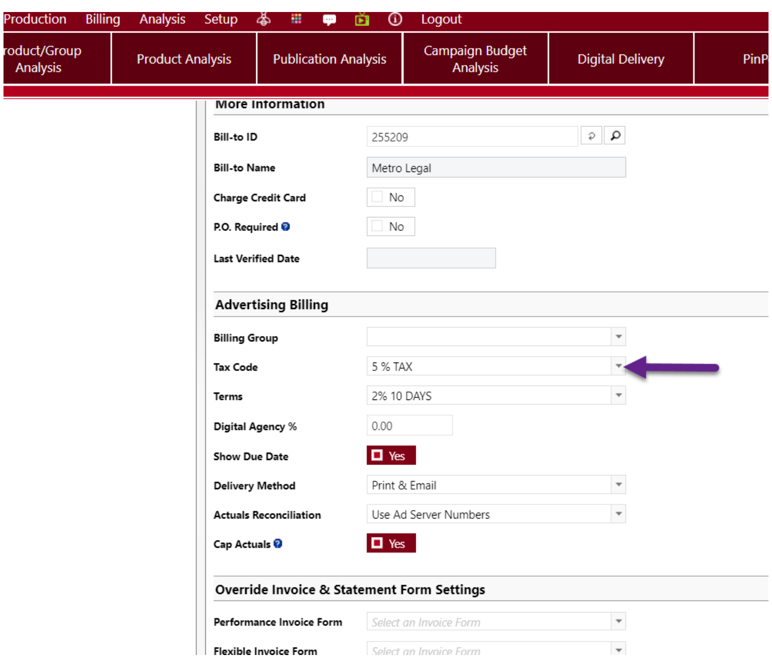
Navigate to the Setup menu -> System Tables Setup -> Tax Maintenance. Choose the tax to mark as reversed on orders.



Check the field “Reverse Out Tax” to change its value to “Yes”. Save the settings.

Navigate to the menu setup -> Advertising Setup -> Advertising Invoice Forms. Add the field to display the reversed tax to your template which you use for billing for the product group. Save the template.

Navigate to the Client maintenance screen in the menu Customers -> Advertiser/ Agency Maintenance and choose the tax code above.



Navigate to create a campaign for this advertiser. With the condition that the Product and Ratecard allow for the tax to be calculated, bill the campaign.

Legal Services	Brand Name	
	Brand Billing Contact Email	
-25.88	Reverse Tax Amount	
NATS	Product Group ID	
Nature Pubs and Digital	Product Group Name	
	Campaign Description	
12/20/2021	Campaign Start Date	
20 Dec 2021	Campaign Start Date (d MMM yyyy)	
12/31/2021	Campaign End Date	
31 Dec 2021	Campaign End Date (d MMM yyyy)	
5241	Campaign ID	
	Reference No.	
	Order Contact Name	
	External Campaign ID	
517.50	Base Amount (2 decimals)	
517.50000	Base Amount (5 decimals)	
0.00	Adjustments Amount (2 decimals)	
0.00000	Adjustments Amount (5 decimals)	
517.50	Gross Amount	
0.00	Agency Commission Amount	
0.00 %	Agency Discount Percentage	Does not include +/- prefix
0.00	Campaign Commission Amount	
517.50	Net Due	
517.50	Local Net Due	

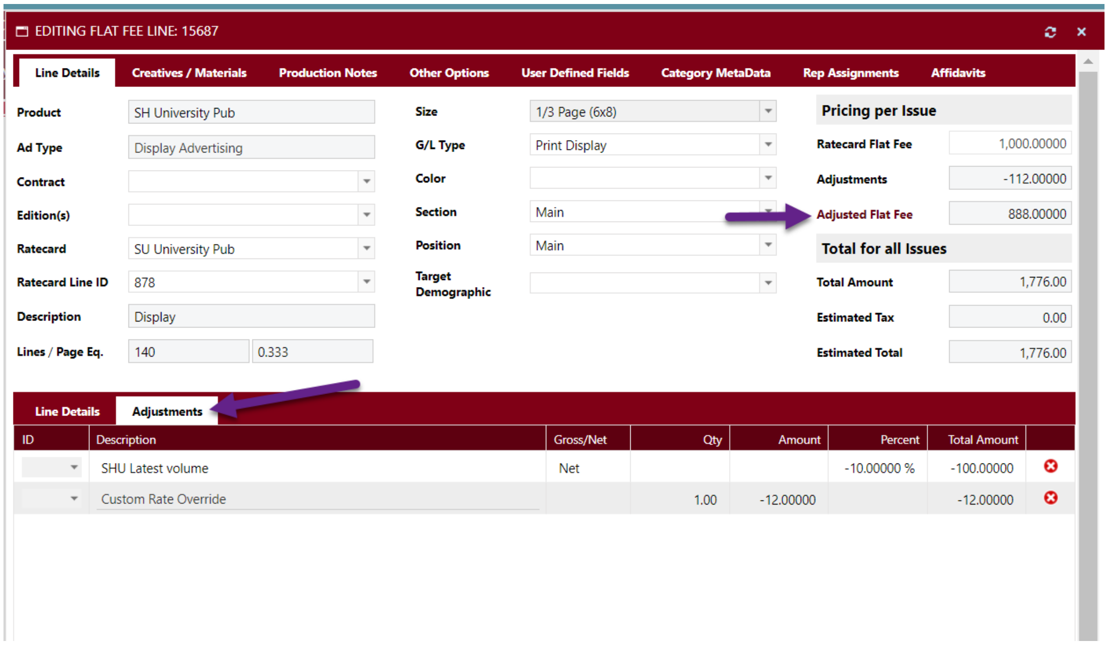
The invoice displays the reversed tax amount, and the Net amount without the tax.

Quick Line Entry Copy

Quick Entry line copy from a campaign copies the automatic adjustments based on preset frequency discounts on a line, but not the manual adjustments using the incentives or Rate Adjustments.

Create a new campaign with a line where frequency adjustments are applied based on Ratecard schedule.

Add another manual adjustment from the line itself. Apply incentives as well if available.



Save the line.

Navigate back to the Line Item and click Quick Entry button. Click the box and choose to copy this line into the campaign.

The result copies only the automatic adjustment stemming from the Ratecard frequency discount schedule. The incentives and manual override adjustments are not copied.

Renew Campaign Line Adjustments

Renew Campaign from the campaign header copies all adjustments on a line including manual and automatic adjustments.

Navigate to the campaign in the section above in the header section. Click the Edit drop-down and click Renew this Campaign.

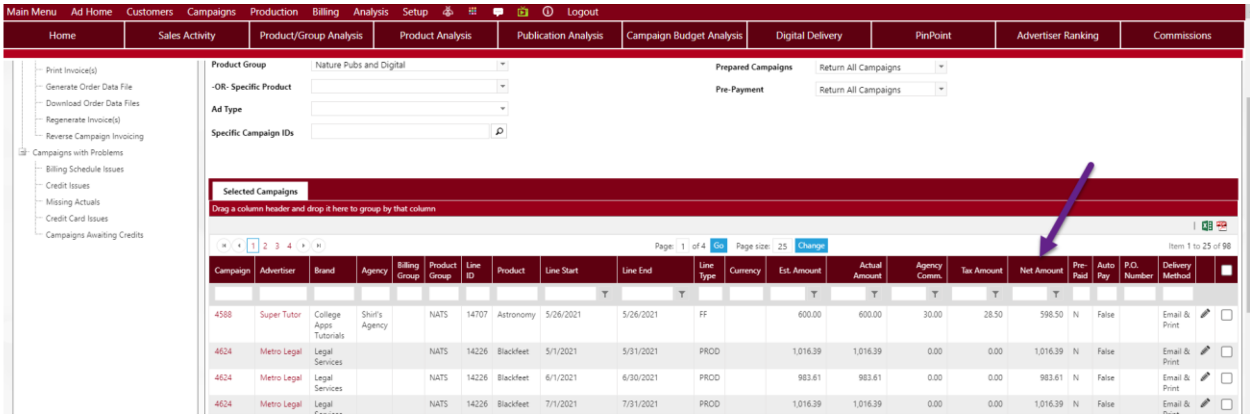
Note that the copied line includes all adjustments from the line including incentives and manual adjustments.

Prepare Billing Screen Net Amount

Prepare Billing screen has a new column “Net Amount”. This is the “Actual Amount” - “Agency Comm” + “Tax Amount”.

Navigate to create a new campaign which has agency commission and tax on the advertiser/ product.

Confirm the campaign. Then navigate to the Billing menu -> Campaign Billing -> Campaign Billing -> Prepare Billing.



Enter the campaign number and start and end dates to query on and note the column “Net Amount”.

This Net Amount = “Actual Amount” - “Agency Comm” + “Tax Amount”.

Check the box for that line and process the billing. The invoice reflects the correct net amount matching the prepared amount.

Position Import New Fields

Position Import template contains 3 new fields for products: Pages Priority, Pages Quadrant and Pages Position.

Navigate to the menu Setup -> Product Setup -> Position import. Click the button to download the template to fill out with positions you’d like to import.

Once the template is saved to your desktop with the rows you’d like to import, click “Select” button and upload the template. Then click “Test Import File”. If there are any errors, the system will direct you to correct them. Once you resave the correct template, remove the old template on the screen by clicking the x button and re-select the corrected template to upload. Repeat the process till the system clears all errors. Then click “Import File”. Once the import is complete, you’ll see the new positions under the Positions node for this product.

The bold fields in the template are mandatory and the ones which are yellow highlighted must contain the values that match the ones in Naviga Ad.

For example, some of these fields are as follows:

Product	This is a mandatory field and its value must be already in Naviga AD as the print or digital product in which the Ad is created.
Section	This is a mandatory field and its value must match the section already defined in the product.
Position ID	This is mandatory to enter as the new position ID you’d like to import.
Position Name	This is mandatory to enter as the new position description you’d like to import.

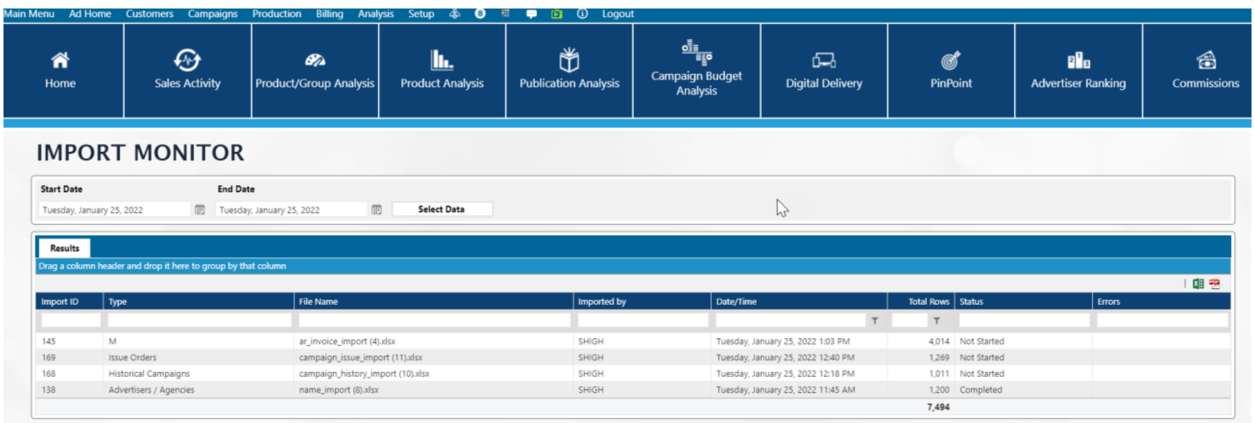
Size	This is an optional field, but its value must be matching the defined values in the menu Setup -> Advertising Setup -> Size Setup -> size ID.
Pages Priority	This is optional and the values must be from Naviga Ad.
Pages Quadrant	This is optional and the values must be from Naviga Ad.
Pages Positions	This is optional and the values must be from Naviga Ad.

Import Queue Monitor

Import Queue Monitor screen is available to monitor the import status of AR Invoices, Advertiser/ Agencies, Campaign Orders and Issue Orders. This pushes the import items into a queue unrelated to the user session of Naviga AD and can be monitored for progress.

Navigate to the menu Setup -> Admin -> Advertiser/ Agency Import. Download the import template and fill it out and perform the import.

Navigate to the menu Setup -> Admin -> Import Monitor and enter the date range of the import which you just performed.



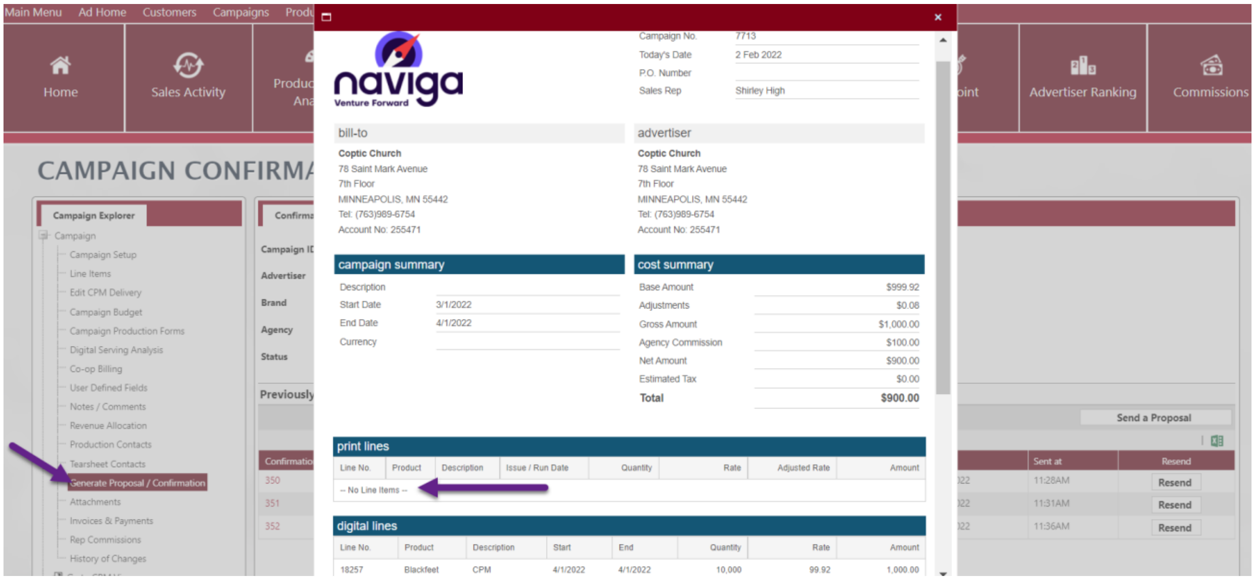
The screen provides data for the import progress status and errors if any during the import process.

Hide Zero Lines on Confirmation Template

The button “Hide Zero Lines on Invoices” in the Product Setup screen now also applies to the Confirmation Template sent to clients.

Navigate to the menu Setup -> Product Setup -> Product Details and choose a product from the drop-down menu. Scroll to the button “Hide Zero Value Lines on Invoices” and check the button to “Yes” and save the product settings.

Create a campaign using this product and create several lines, one of which at a Zero value.

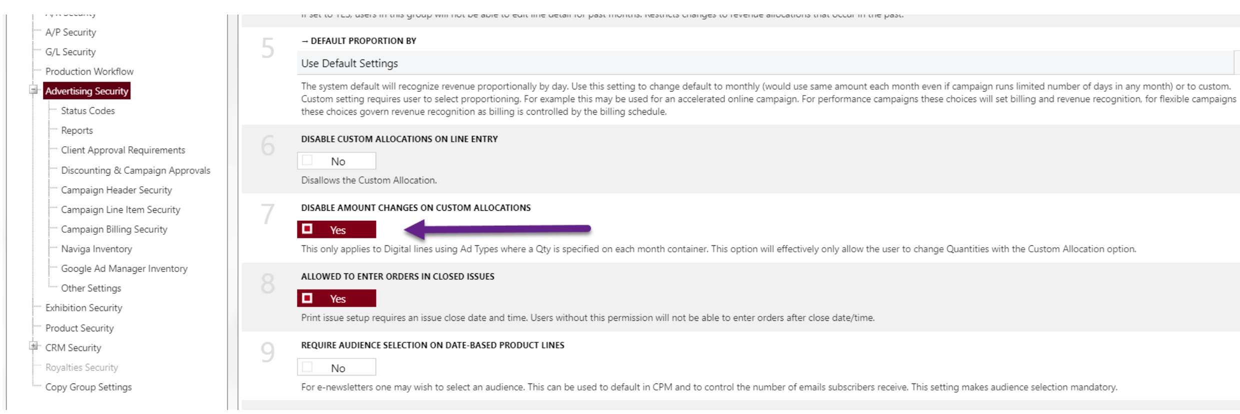


Generate the confirmation from the Confirmation node and note that this product line of 0 value doesn't display on the template.

Disable Amount Changes on Custom Allocations Flag

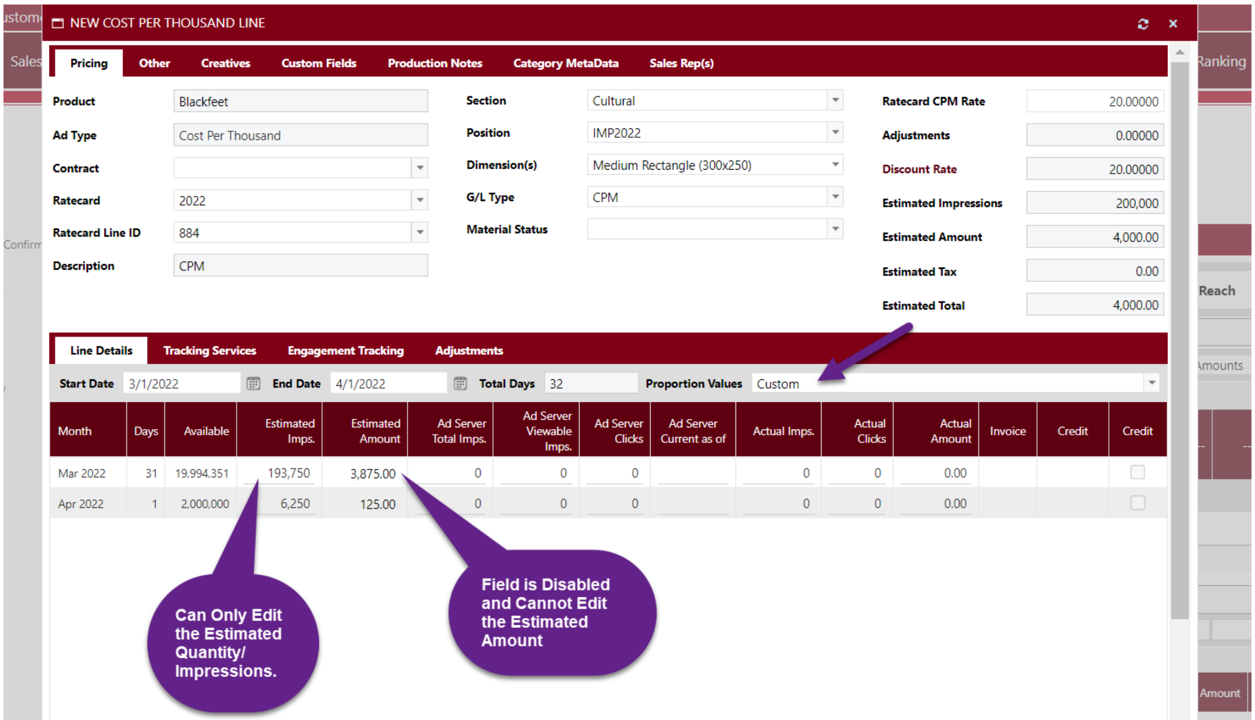
Advertising Group Security has a new option: "Disable Amount Changes on Custom Allocations". This only applies to Digital lines using Ad Types where a Qty is specified on each month container. This option when checked will effectively only allow the user to change Quantities "Estimated Impressions" per month with the Custom Allocation option chosen. This in effect prevents changes to the CPM Rate on each line/ month and keeps the rate the same for all months regardless of the Estimated Impressions entered for the month. If this field is not checked then user can change the "Estimated Amounts" as well as the "Estimated Impressions" on a line item, which will then change the CPM Rate calculation for that line.

Navigate to the menu Setup -> Admin -> Group security -> Advertising Security and scroll to the section "Campaign Line Items" and check the flag "Disable Amount Changes on Custom Allocations" to reflect the value "Yes".



Create a campaign line item across 2 months using a CPM rate for example, or an Ad Type which requires the entry of a quantity.

Choose the option of "Custom" in the Proportion Values drop-down field.



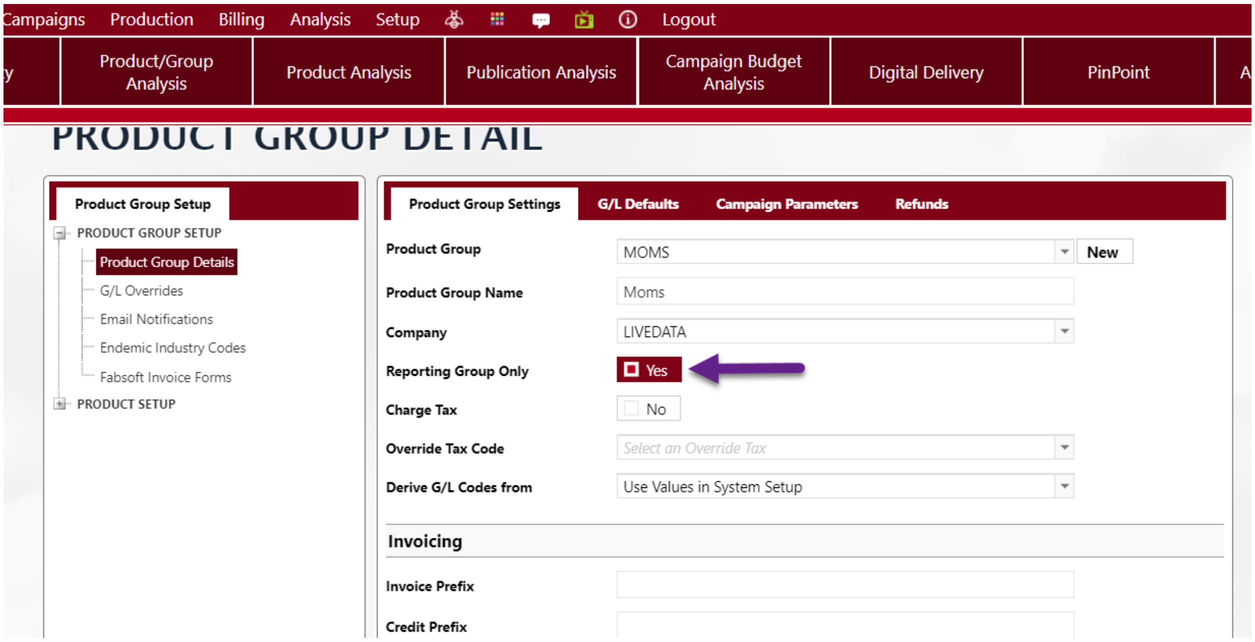
Note that the field "Estimated Impression" or Quantity changes to allow editing but the field "Estimated Amount" is greyed out and disabled not allowing any edits. Hence, the CPM rate in this case remains the same when you change the impressions and auto-calculates the estimated amount based on this rate.

With the security field set to No, you can change both fields thus changing the CPM Rate for that line to be different than any other lines.

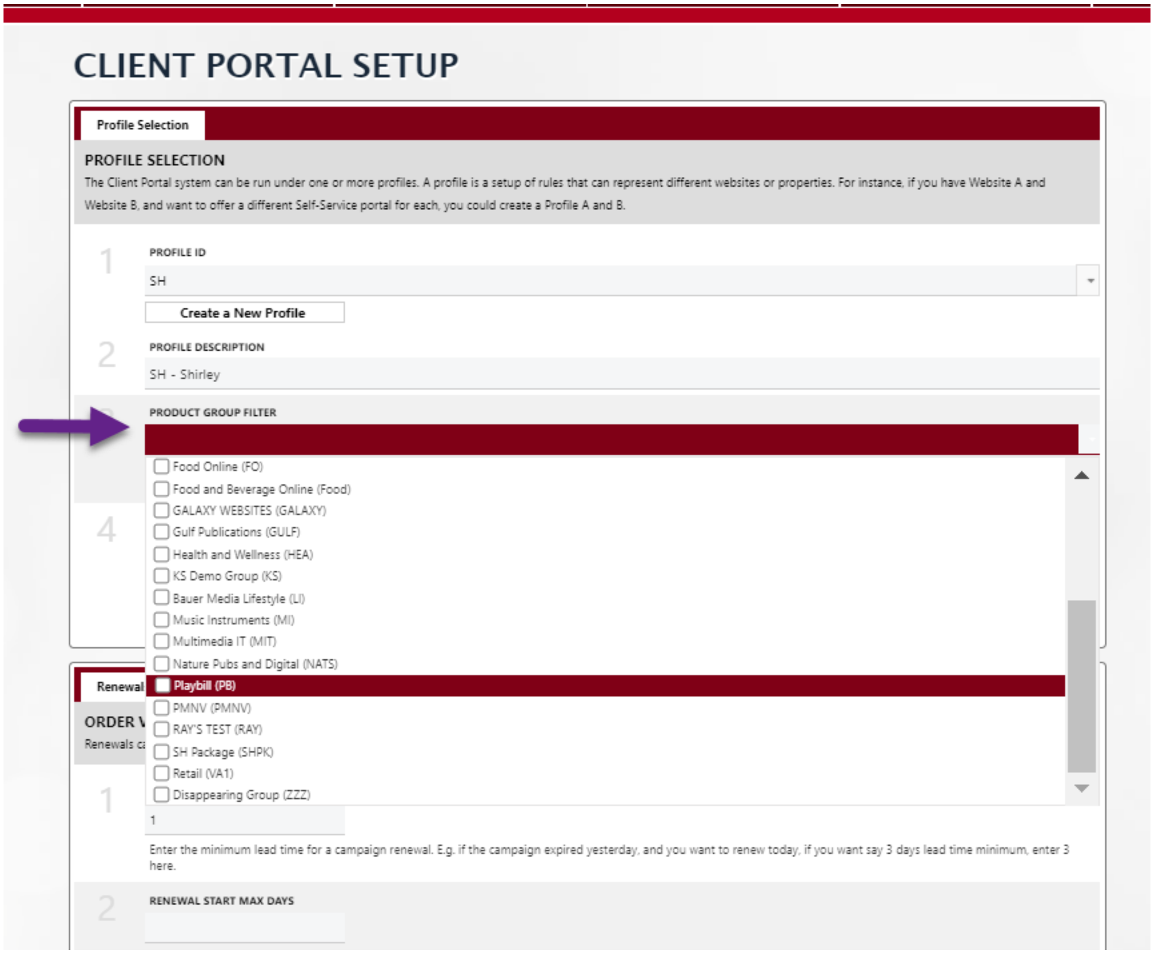
Portal Setup Product Groups

The "Product Group Filter" field only displays product groups which aren't flagged in the Product Setup page to be "Reporting Group Only".

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



If the flag "Reporting Group Only" is checked, then this group will not appear in the list of product groups on the menu Setup -> Portal setup -> Portal Setup as an option by which to filter the portal profile.

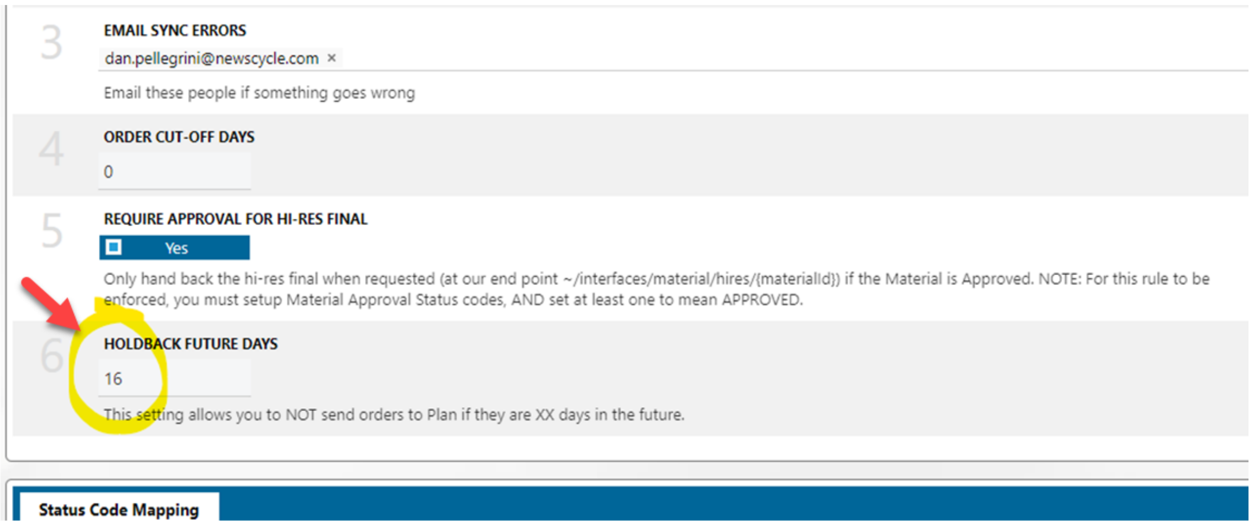


The product isn't available as an option to choose.

PlanSmart Hold Back Field

PlanSmart has a new field in the setup which allows user to delay sending orders/ads over to Plan until XX number of days specified here, before these orders are due to run, so that they don't get purged by editorial before they even run. Most times this field should be left blank if there's no issue with purging of orders prior to running them by accident.

Navigate to the menu Setup -> Plansmart Setup.



In the field “Holdback Future Days” enter the number of days before the orders are due to run so that they are held back and not sent to Plansmart and not sent until the order date is closer to today’s date than this number of days specified here.

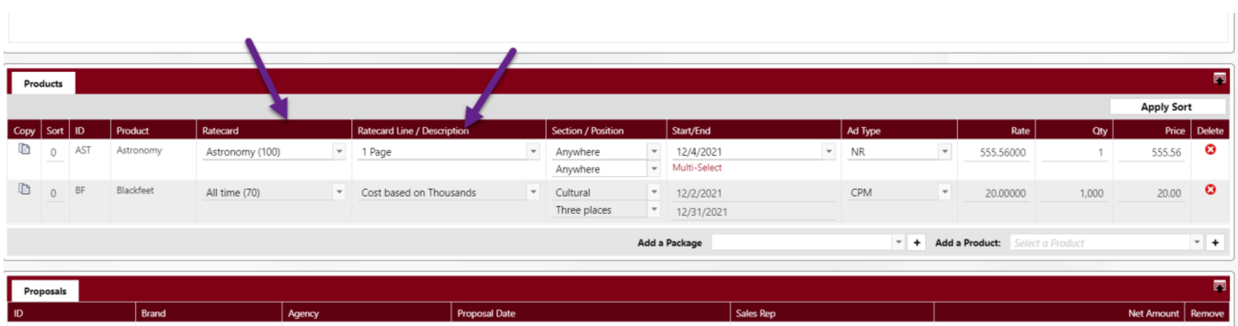
CRM

Section and Position in Opportunity Products

Creating a proposal from within an opportunity and choosing the Ratecards and Ratecard Line will automatically default the section and position in the opportunity. The system won’t do any verification at this point including checks if the selected dates are valid, or check inventory. When the proposal is created from the opportunity and saved or when user clicks “Check Inventory” on the line item, then the system verifies the items related to Section/Position as it does during campaign entry.

Navigate to the menu Opportunities and enter a new opportunity.

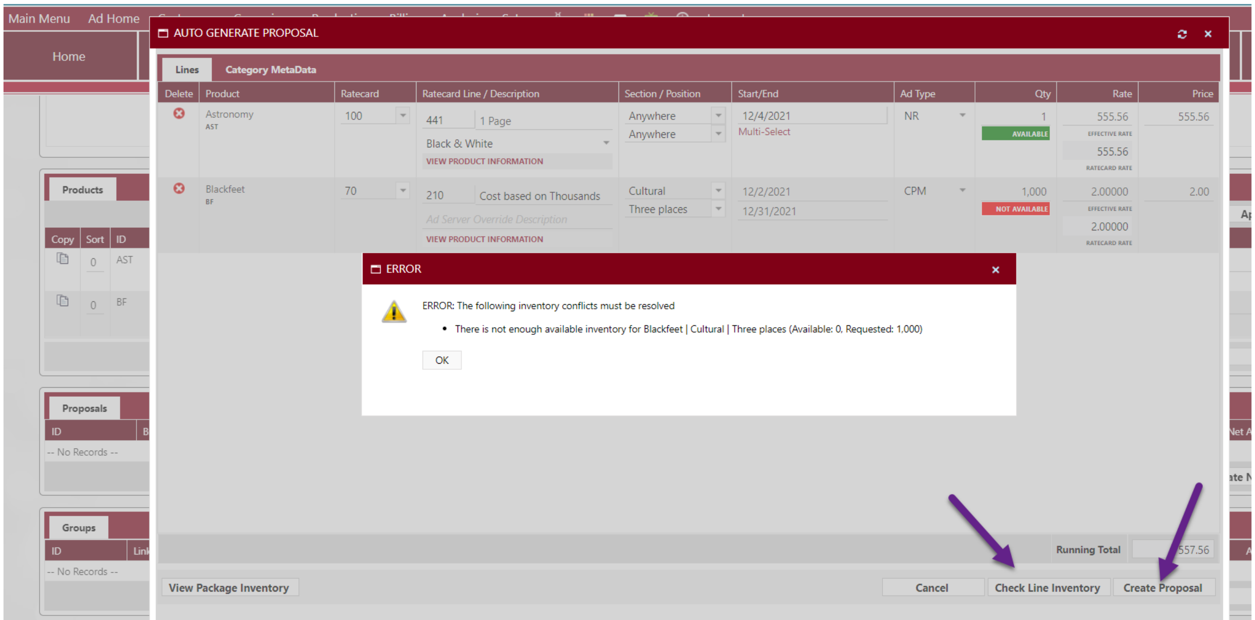
Scroll to the “Add a Product” drop-down and choose a product from the drop-down. Choose the Ratecard and Ratecard Line.



Note that the Section and Position are defaulted according to the setup on the product.

Save the opportunity.

Click “Auto Generate Proposal”. The lines display as part of the new proposal in the pop-up screen. At this point, you can click “Create Proposal”, or you can click the “Check Line Inventory”.



In both cases, the system alerts you to the lack of inventory. If inventory is available, the system creates the proposal.

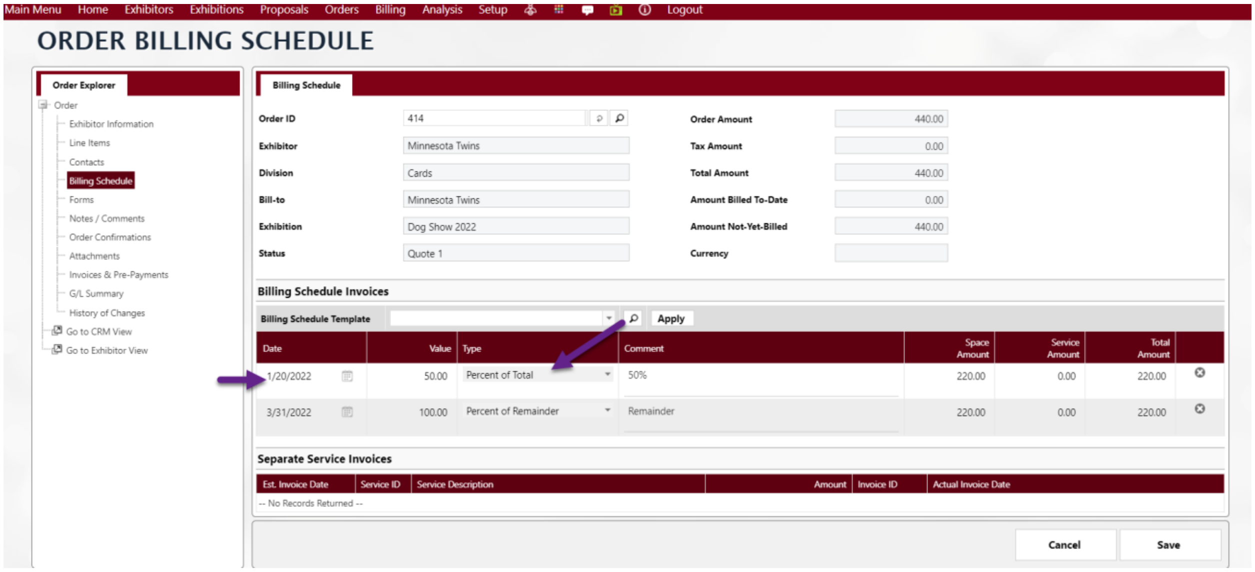
Exhibition

New Group Security flag to allow users to prevent editing the Exhibition Default Billing Schedule date or amount on an EX Order. This applies to stand-alone Exhibition orders created from the Exhibition module or orders linked to a Performance Campaign but not Exhibition orders on Flexible Billing Campaigns.

Navigate to the menu Setup -> Admin -> Group Security -> Exhibition Security. For the group you’d like to affect, scroll to see the “Order Entry” section, and check the box on the option “Disable Manual Billing Schedule Options if Templates Available”. This value is Yes and then save the screen settings.

Create an exhibition order from the Exhibition module or attach an exhibition to a performance campaign order from the AD module.

Click the node “Billing Schedule” on the order.



Note that the date and amount on the schedule lines are grey and disabled.