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 2023.2 release grouped by module. We expect to release this version Mid-April 2023.

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 below.

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

- Bulk Update GAM Lines - This will be new functionality for the users as well as a small change to the User Interface that you might want to advise them about.
- Forms on the Portal will be a change for your clients, as will the display if you happen to disable some of the boxes. Please see Portal Changes below so that you can inform your users in case clients have questions about the new options.
- If you are using Preflight with Twist or Asura, the preflight settings have moved with this version. Please visit the **Advertiser Portal section below** and be sure to re-establish your connection settings.

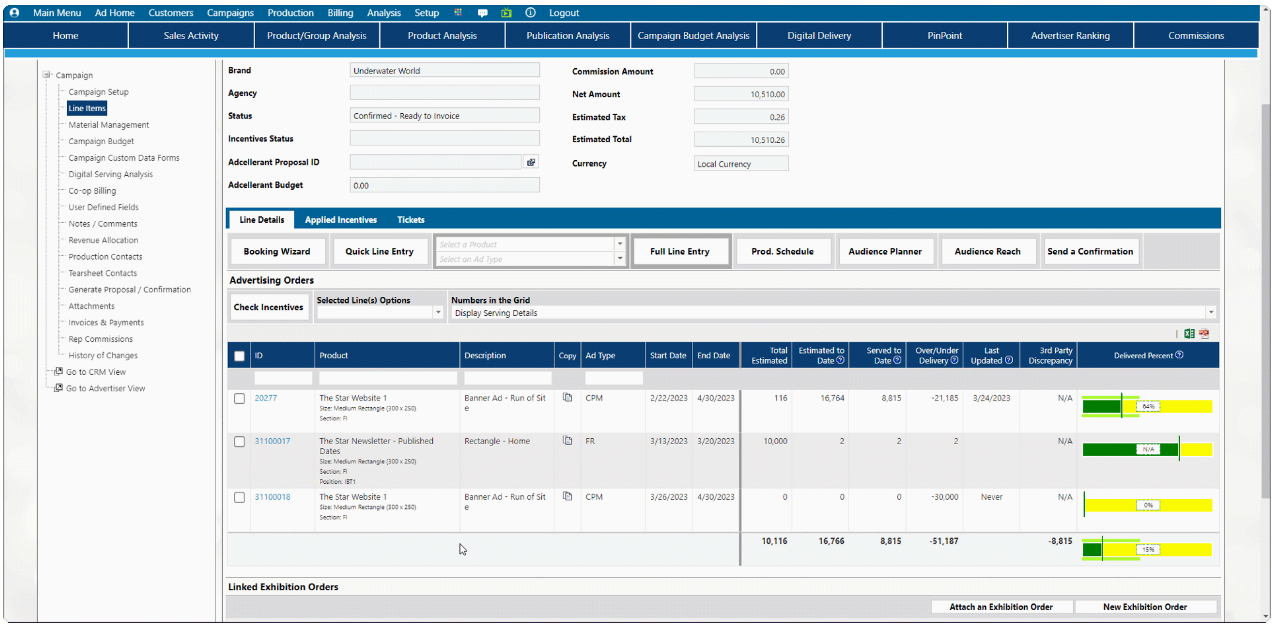
Advertising Module

Bulk Update Targeting on GAM Lines

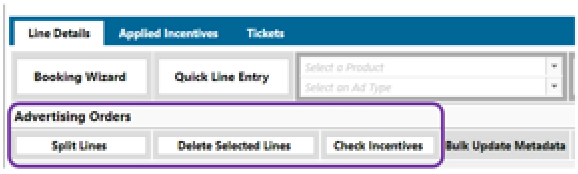
On a campaign with multiple lines, the Google Ad Manager (GAM) targeting can now be updated across all (or select) lines simultaneously. Below is a quick gif depicting the workflow.

Important things to remember:

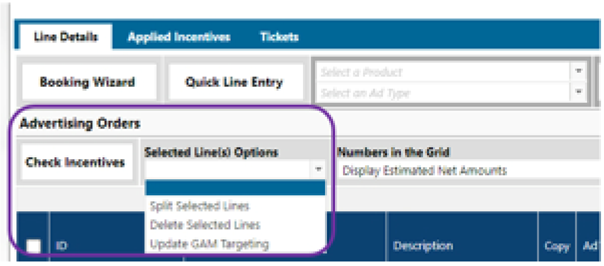
- Selected Lines must be for the same product
- it must be a product that goes to GAM.
- Any Targeting items that need to be copied across to the other lines must be checked
- From the line items screen, select the applicable line items. The first one selected will be assumed to be the one you want to display, but you can change that to another line if desired.



Note that this required a small change to the UI that your users might need to be warned about. Previously their screen had several addition buttons above the list of lines:



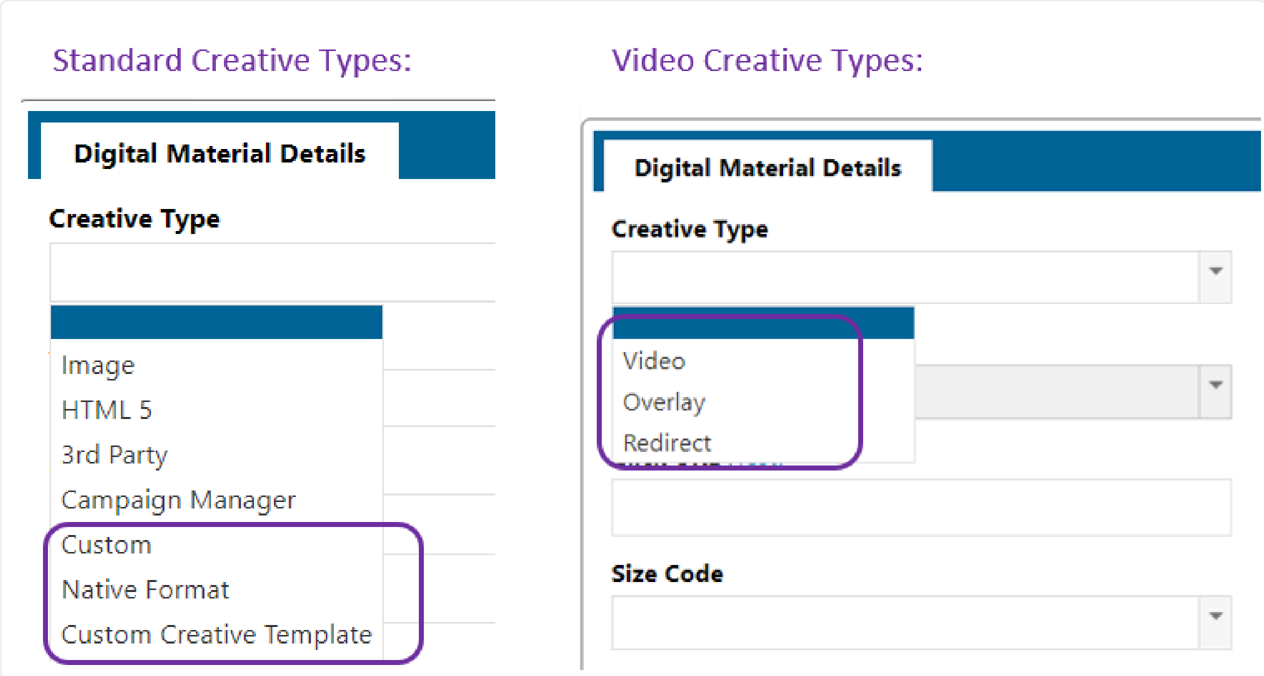
Now the Split Lines and Delete Selected Lines options have been moved into a dropdown and the Update GAM lines option is added to this dropdown as well.



In previous versions of Naviga Ad, on the campaign screen, there was a node called "Edit CPM Delivery," which allowed some editing, but not as comprehensive as the above functionality, so we have removed that node. If you feel that it is still needed for your business, please notify support. We can turn it back on on a case-by-base basis.

Additional GAM Creative Types

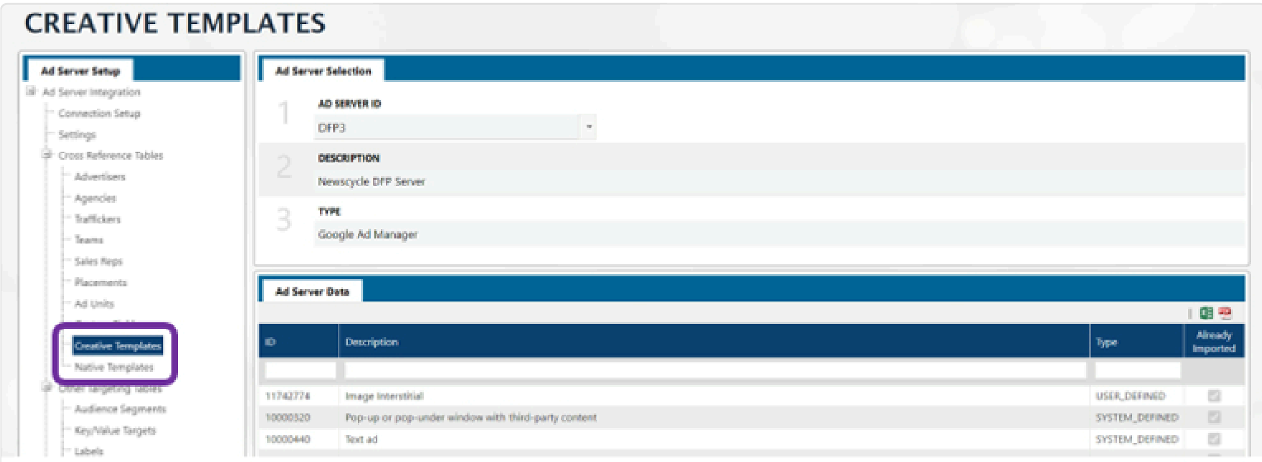
THREE (3) new Creative types have been added to the Creative Type dropdown on a "standard" digital Material. (highlighted below). There is also better support for Video with THREE (3) creative types added for Video Creative types.



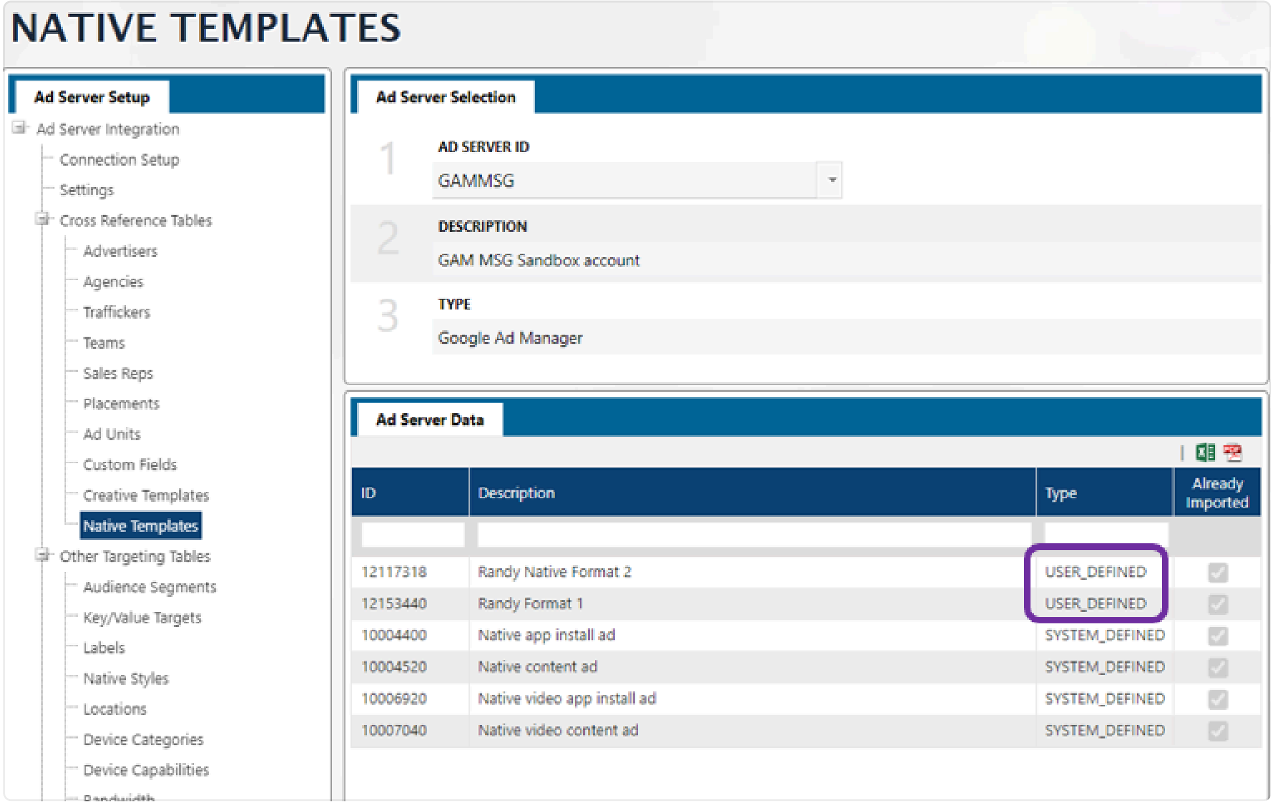
The Native Format and Custom creative Template types can have very sophisticated questions to be answered, files to be uploaded, etc. We are not tackling that part at this time. The goal for this release was to allow the creative container to be selected in Naviga and passed across to GAM with the required information to create the creative record, but not to fill in all the information which would be required to actually publish that creative type. That part will still need to be filled in in GAM, but we can now send the container over with enough information to create the record for someone to then complete.

Setup required

In GAM Connection Setup there are two new sets of fields to be imported in. Creative Templates and Native Templates:



Click Save/Import All at the bottom of the screen to import in all the templates from your GAM server. You will see both SYSTEM_DEFINED and USER_DEFINED templates are imported in:

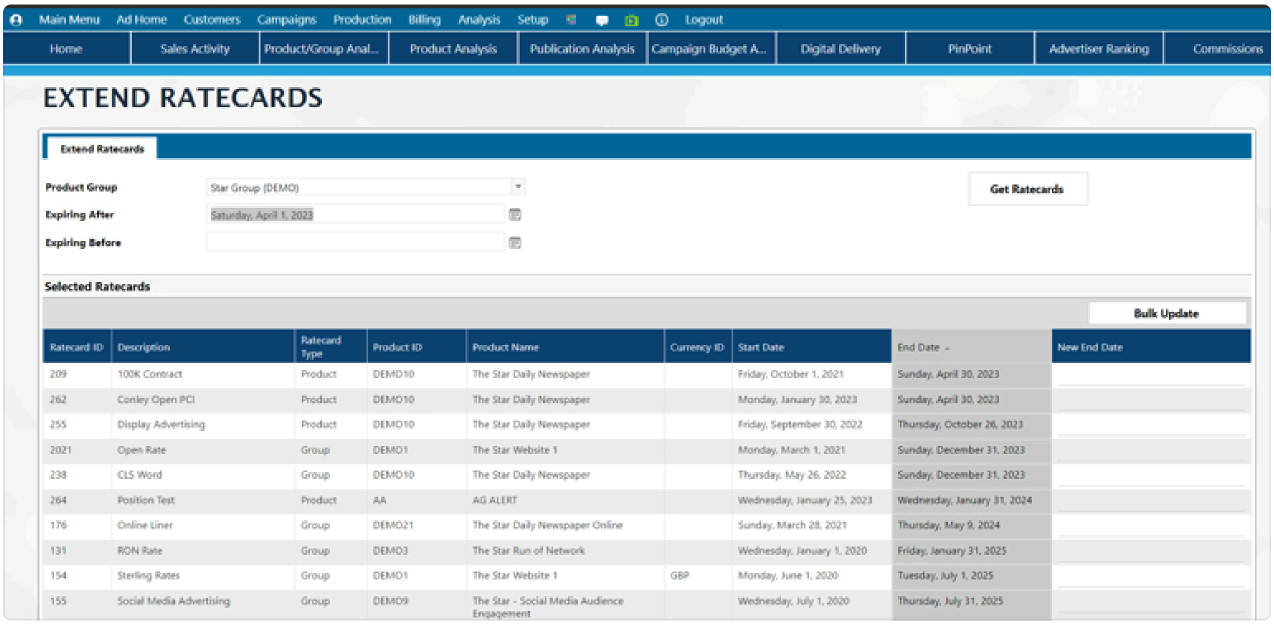


On a digital material record, for the Native Format and Custom Creative Template, you will have a new dropdown field called Ad Manager Template. If you are in a new material outside of order entry, select your ad server from the line above and then select the template from the dropdown. (if you are in order entry, we already know the ad server, so it doesn't need to be selected manually, so you can simply slect the Ad Manager Template). At this time we are only supporting your USER_DEFINED type templates as the other templates have required fields that need to be filled in prior to being able to create the container record and as mentioned above, that isn't something we are tackling at this time.

Extend Ratecard

It isn't always desireable to change the rates every year, so now there is a process to extend existing ratecards rather than creating new ones.

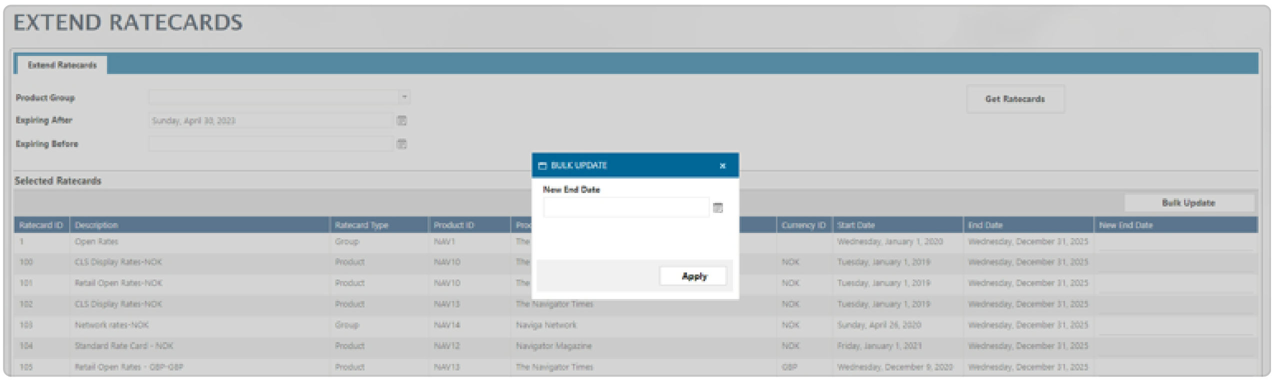
Navigate to Setup → Extend Ratecards in the Advertising Module



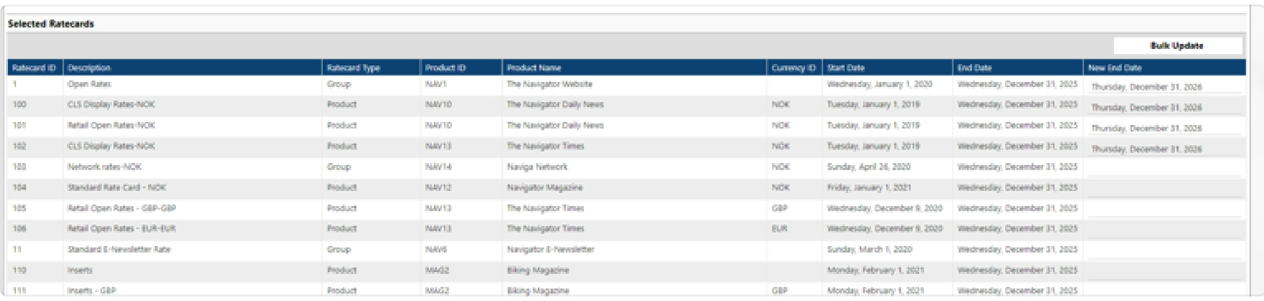
All three filter fields are optional, although you ***should*** select something there to narrow down the results. Selecting all rate cards for all products would generally return too many results to be useful.

For example, you might want to find all ratecards for a given product group that are ending before the end of this month.

One you have your list of ratecards, click the bulk update to enter a new end date for the entire list.

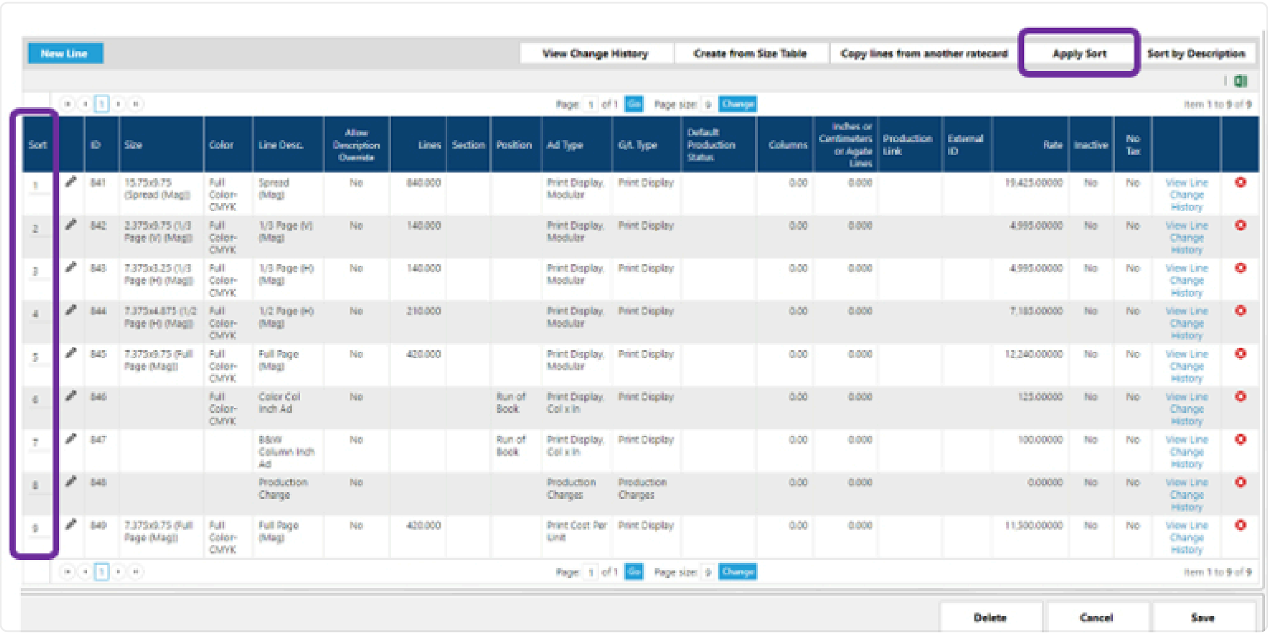


Alternatively, enter dates manually in the New End Date Column and then save at the bottom of the list.



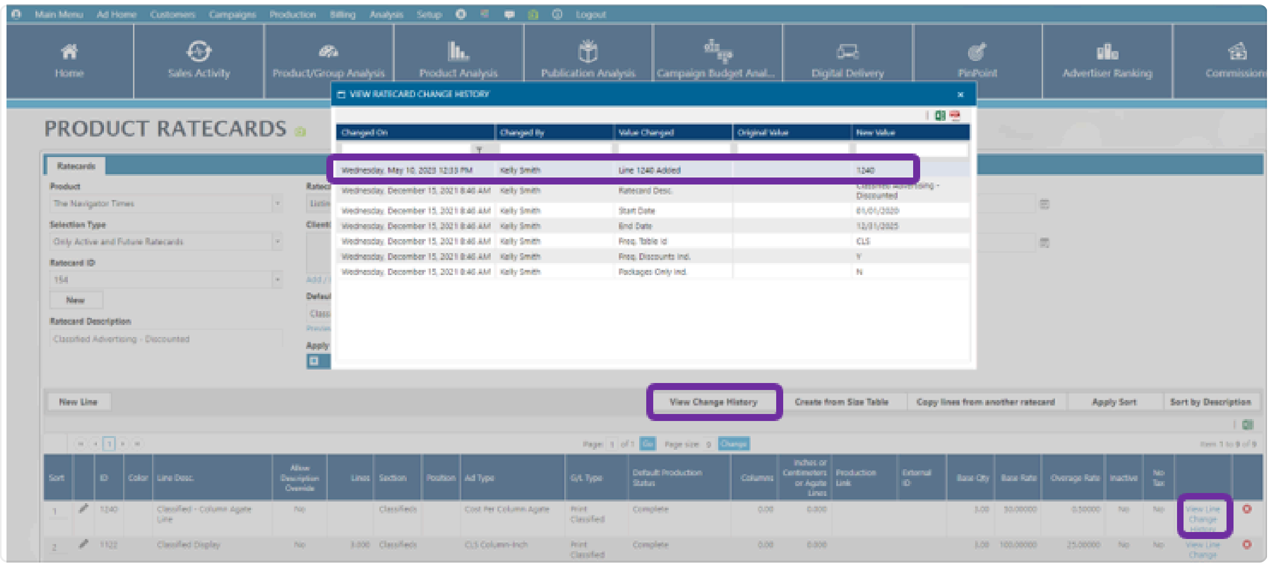
Ratecard Setup - SORT

The ratecard lines could always be sorted, but previously the rateline had to be opened for editing to change the sort number. Now it can be done right from the main ratecard screen. Don't forget to click apply in the top right to apply the sort settings and then click save at the bottom to save the rate.



Ratecard Setup - HISTORY

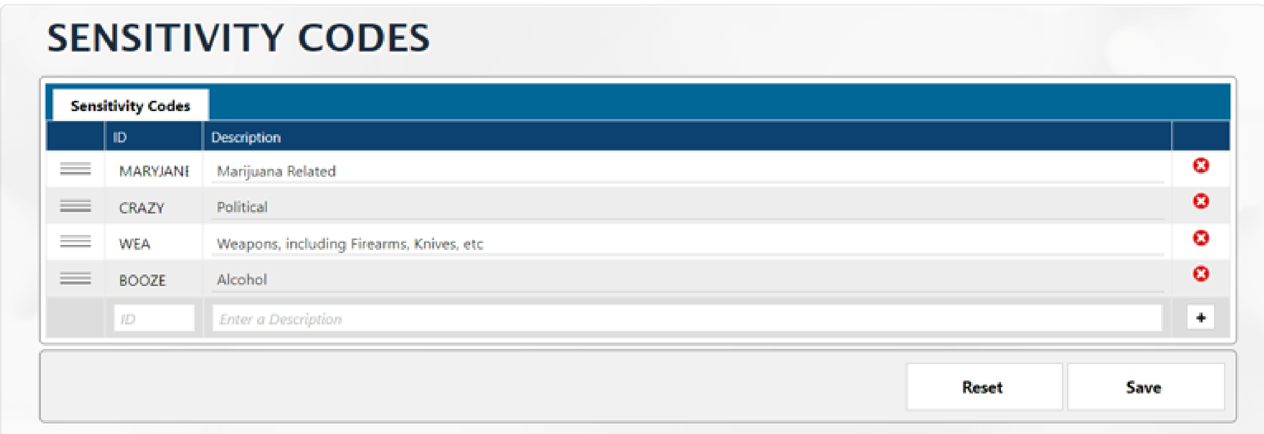
When a new ratecard line is added to a ratecard, we are now storing that on the history. It is stored on the history of the line and also on the history of the ratecard header.



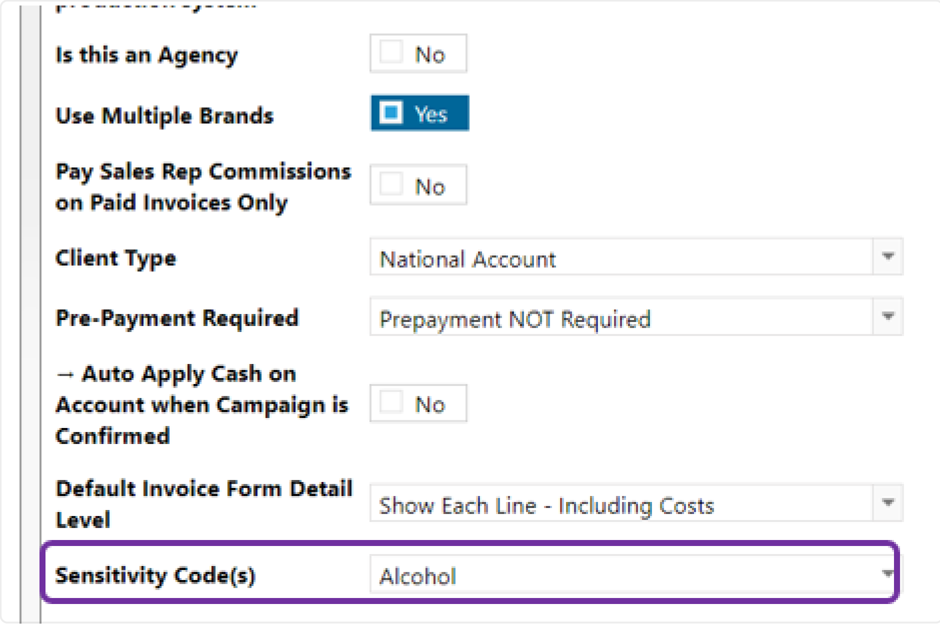
Sensitivity Codes

There is a new concept in Naviga Ad called Sensitivity codes. Sensitivity codes are meant to draw the attention of the user that an ad contains sensitive information. Common uses are for Marijuana ads, political ads, Alcohol ads, etc. Oftentimes care must be taken as to where these types of ads are placed on a page. There is some setup on the ad side and also in Naviga Plan. To use this functionality, you will need to be on a Naviga Plan Version 141218 (April 21, 2023) or newer.

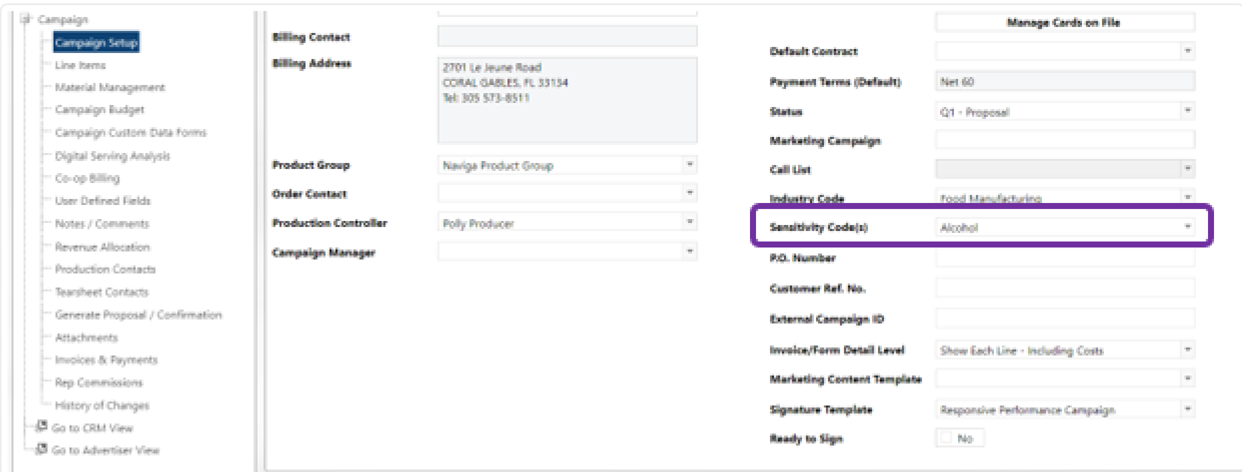
Navigate to Setup → Advertising Setup → Sensitivity Codes and add desired codes.



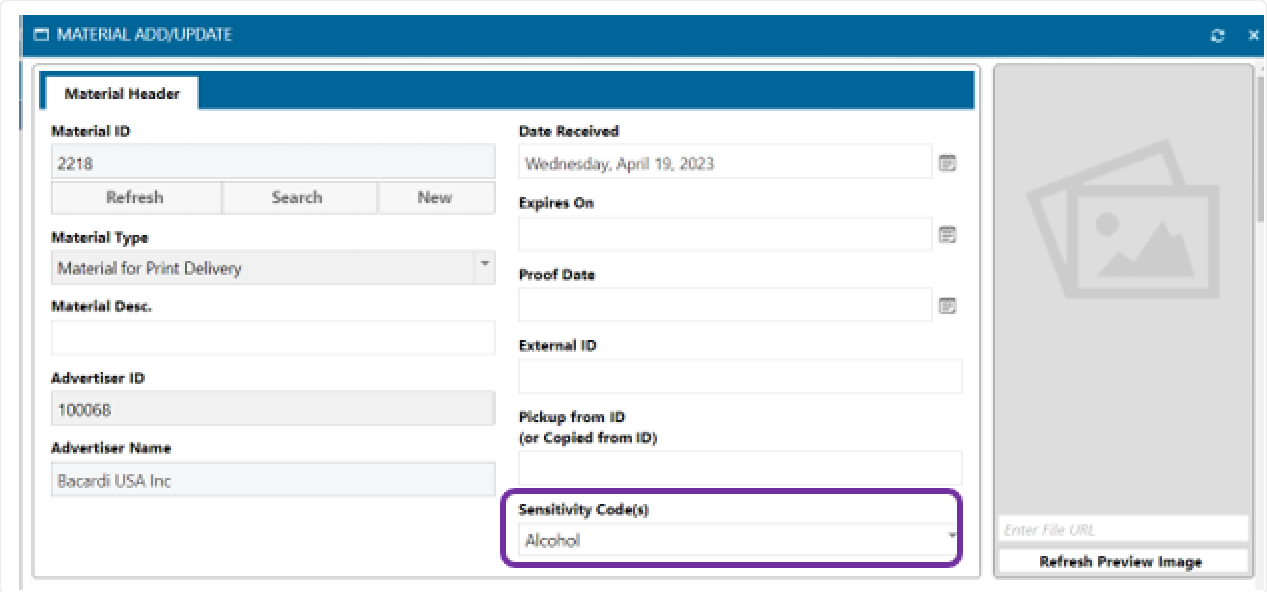
Then Navigate to Customers → Advertiser/Agency Maintenance and select an account who typically publishes sensitive content. there is a new field in the Advertising Details section where you can select one or more Sensitivity Codes for the client.



If you then create a campaign for that client, the client's sensitivity code will be displayed on the campaign header and can be modified as needed at the campaign level. OR if they client doesn't have a default sensitivity code, it can still be manually added onto a sensitive campaign.

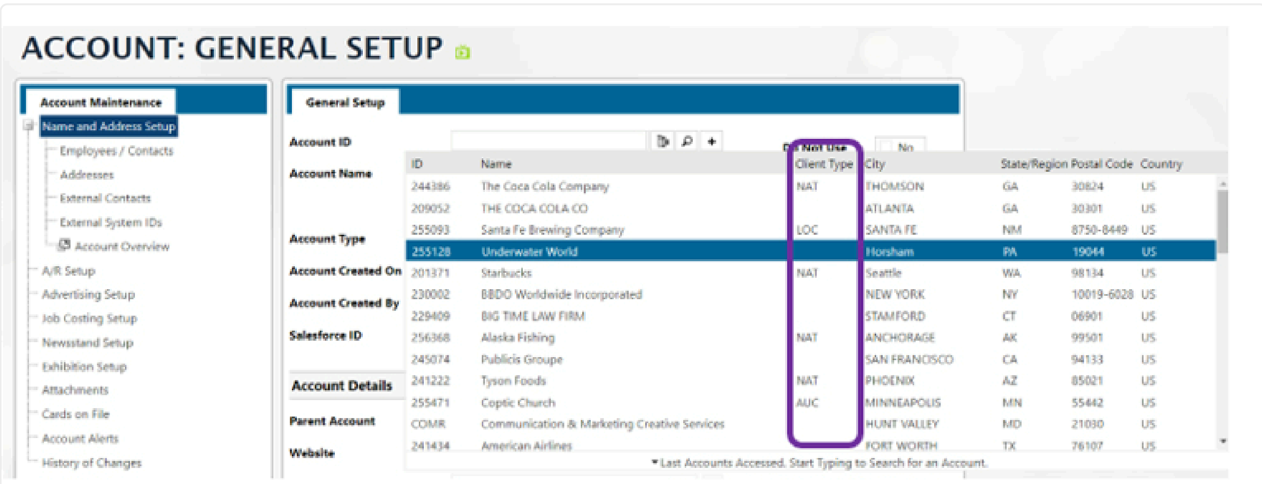


Additionally, when you then create a material record for that campaign, the sensitivity code will flow through onto the material.



Client Type in Search Results

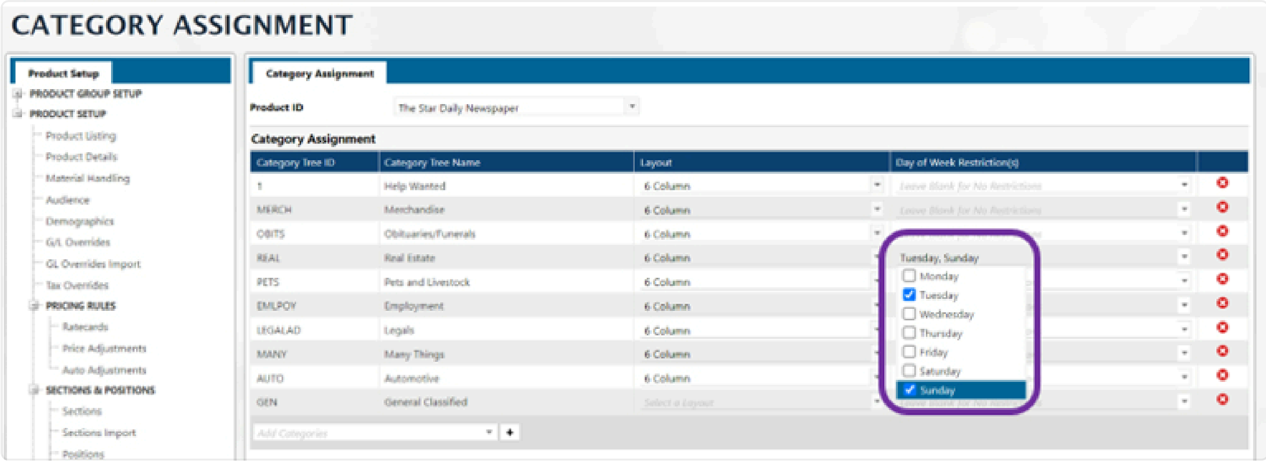
In Advertiser/Agency Maintenance we have now included the Client Type to the drop down list of clients when selecting a client to open. This is displayed if you simply click on the Account ID field to see your recent accounts or if you start typing in the Account ID field to do a quick search.



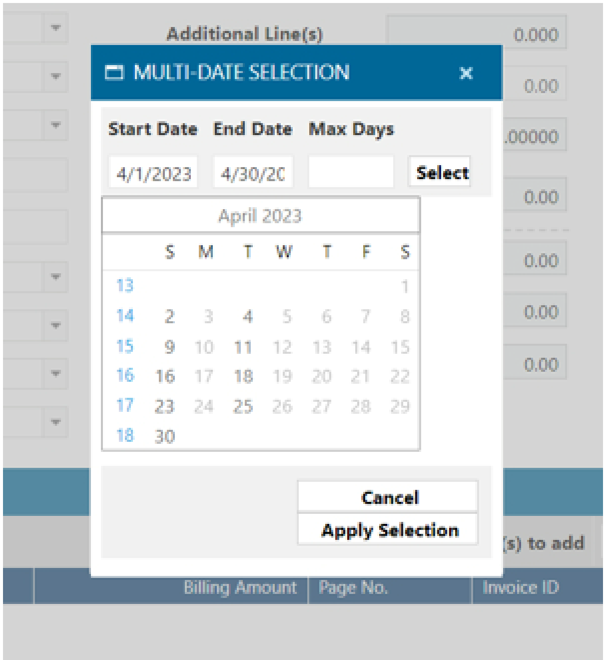
Limit Classified Categories by DOW

Classified categories can now be limited to certain days of the week by Product. For example, perhaps in one product the Real Estate section only runs on Sundays and Tuesdays, even though other sections might run every day.

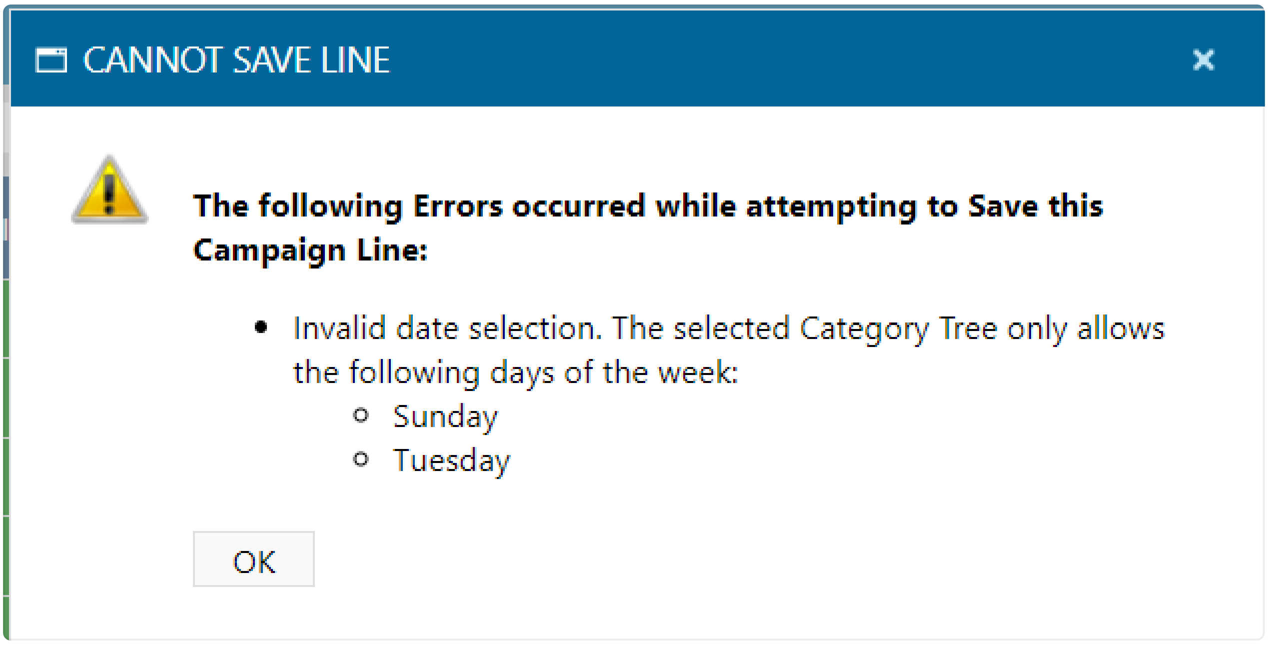
On Product Setup, the category node will allow Day of Week selections. If it runs every day, the field can remain blank



Then when booking a liner order for that category (in Full line or Booking wizard), you will only see issue dates allowed for that category.

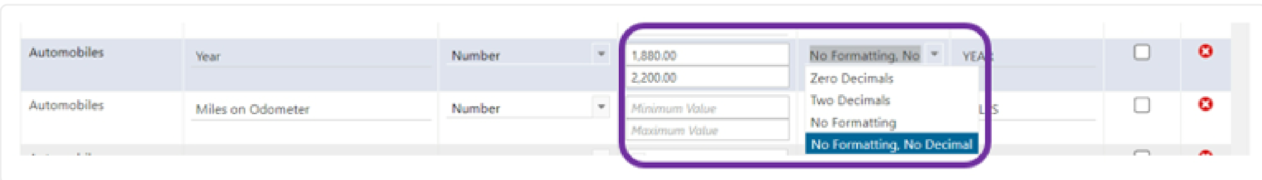


For class display ads, the category might not be selected prior to the booking schedule being entered, so there we do a check upon saving the ad. If you selected invalid run dates for the category you picked, you will be prompted on save to remove them:

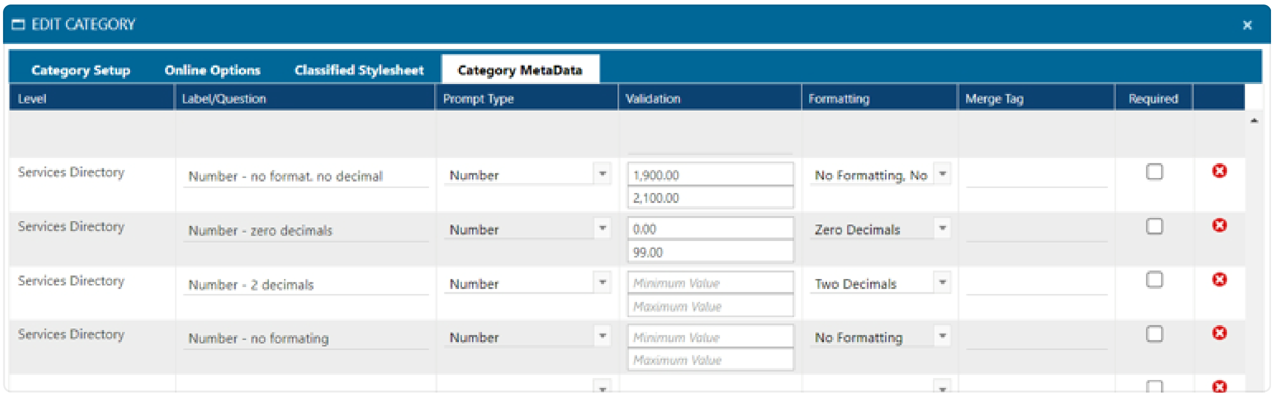


Classified Metadata Options

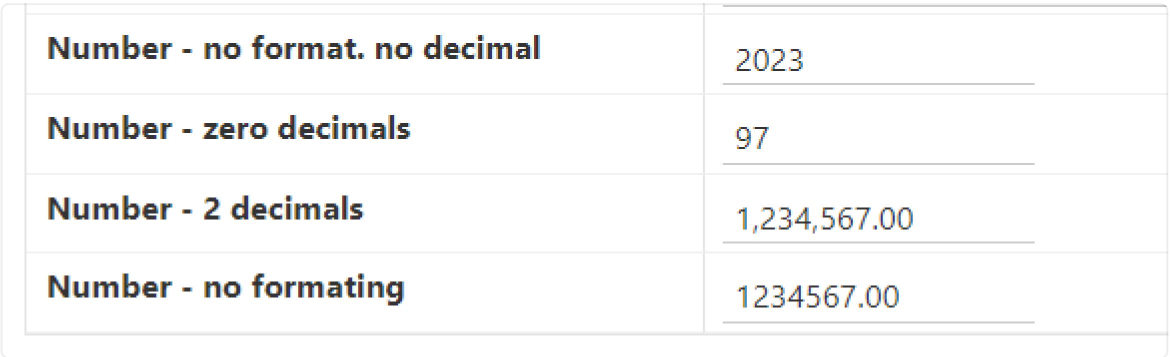
There are a couple new options in Metadata setup for classified. For "Number" and "Number Range" prompt types there is now a validation option which will allow you to enter valid ranges of numbers and an additional formatting type of "No Formatting No Decimals." This allows you to ensure for things like a year, that you can put in an allowed range of years (if you want a 4-digit year for example, you might put in a range of 1900 - 2100 with no Formatting No Decimals to ensure compliance with the desired format. Or if you were going with a 2-digit year, you could put the allowed range of 00-99, for example.



The following shows the setup of each of the number formatting options:

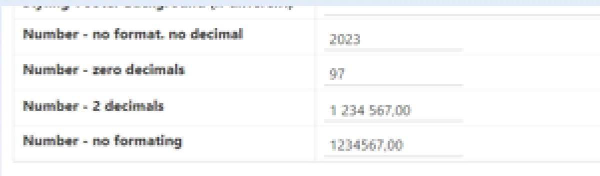


The above would display as follows in order entry:



The Zero decimals option above would have included a thousands separator had I not limited the number to be 99 or less

Note: if you are not in the US, the number formatting will be picked up from your language settings, so it might look like this, or in other supported language formats:

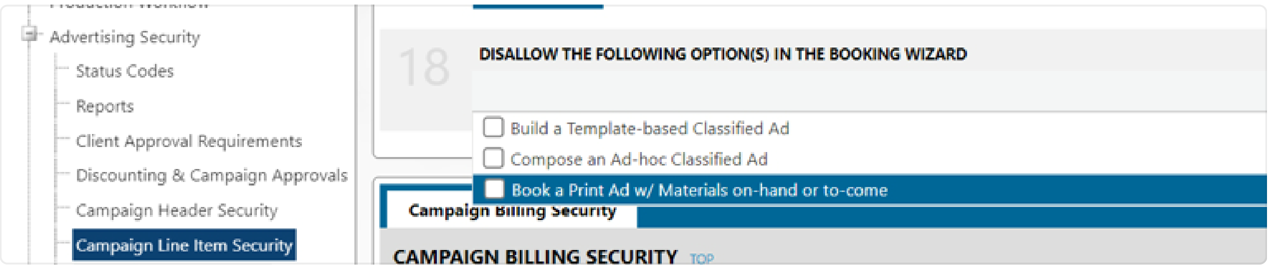


Group Security Changes

Line Item Security - Booking Wizard Options

In Group Security → Advertising Security → Campaign Line Item Security there is a new option for which of the 3 booking wizard options are DISALLOWED for this user group. By default, this will be blank upon upgrading and will therefore work as it always has.

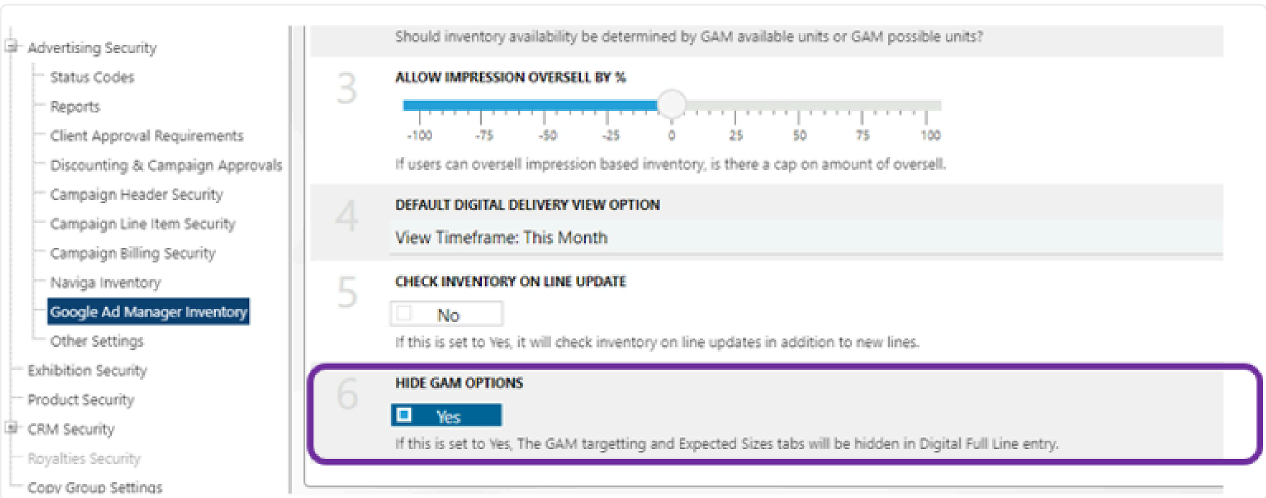
If you would like to prevent certain user groups from choosing one or more of the booking wizard options, select the ones to disallow here:



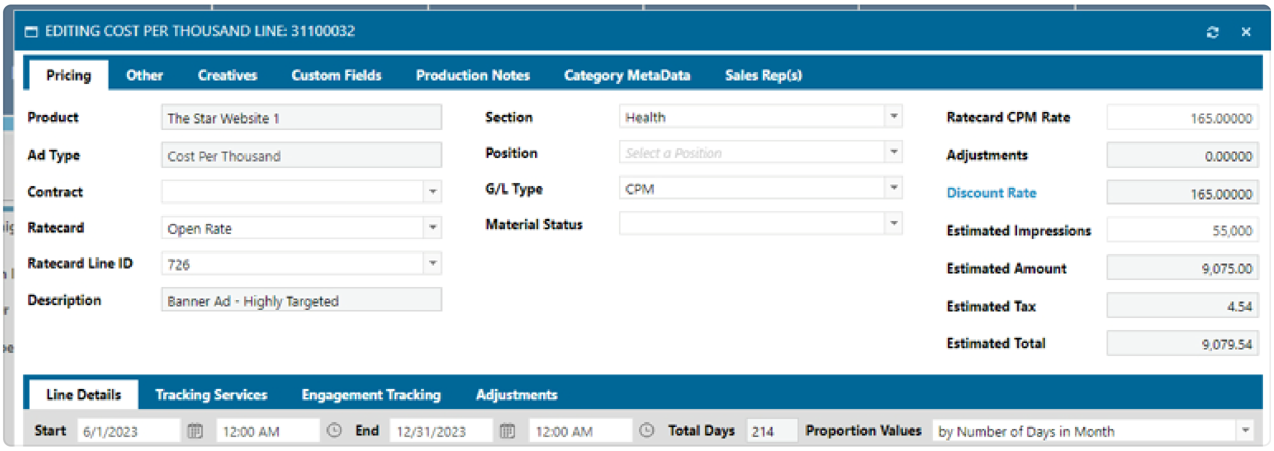
- If there are two or more selected, the user will be prompted to pick which method to use (same as today, but might only contain two options if only allowed two).
- If there is only one allowed option, then the window will simply open into that option
- If you disallow all three booking wizard options, then the booking wizard button in order entry will disappear completely.

Hide GAM Options

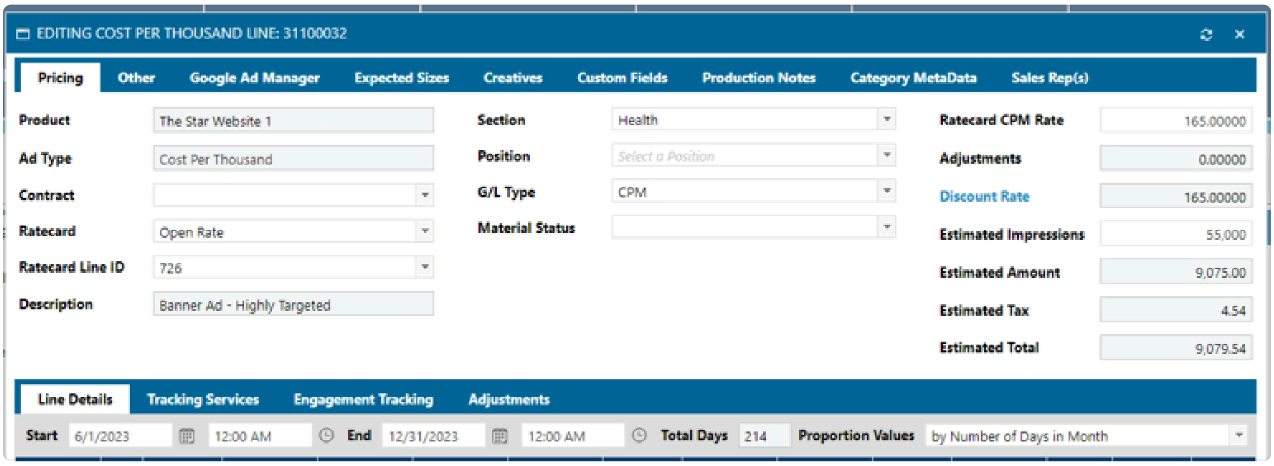
In the Google Ad Manager Inventory Settings section, there is now an option to Hide the GAM Targeting and Expected Sizes tabs in Full Line Entry.



With the above set to yes, the user will see this in Full Line Entry (Note Google Ad Manager and Expected Sizes NOT available at the top):



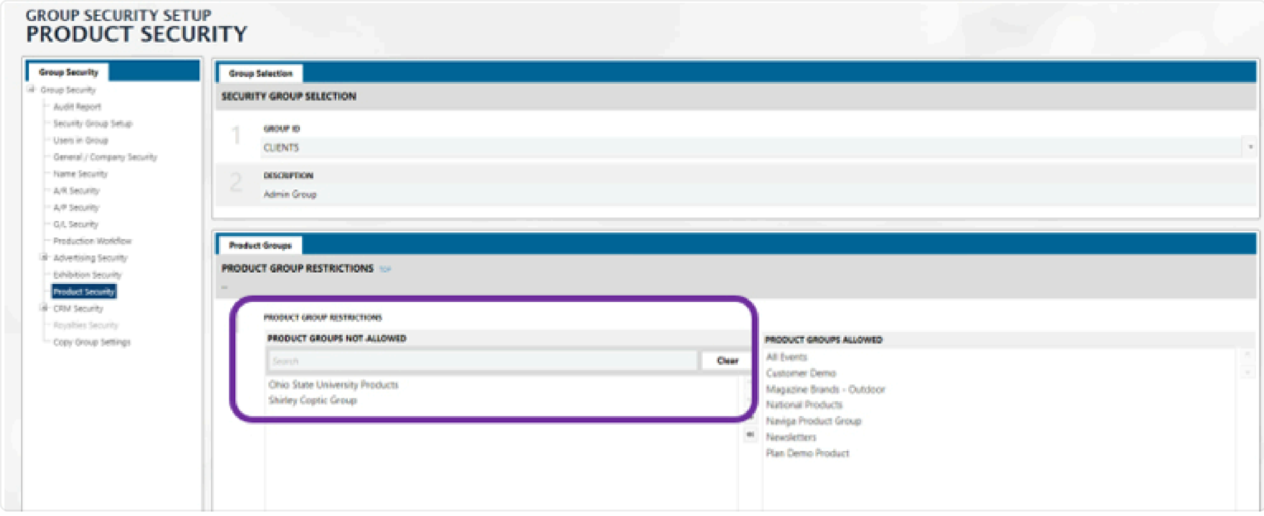
With the above set to no, the user will see this in Full Line Entry (Note Google Ad Manager and Expected Sizes available at the top):



It is expected that if this is set to "yes" for sales reps, that someone in ops will later be setting the targeting and sizes OR that it will be set based on the ratecard line.

Product Security - Filter

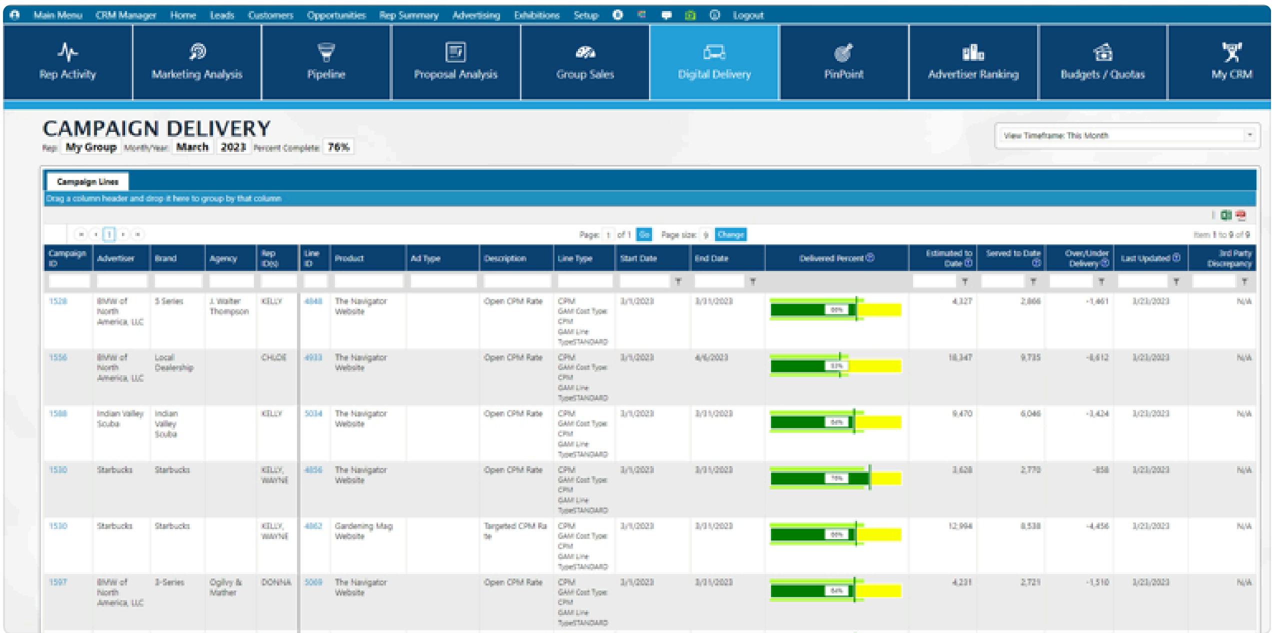
To help facilitate selection when there are large groups of product groups, there is now a filter on Product Group selection



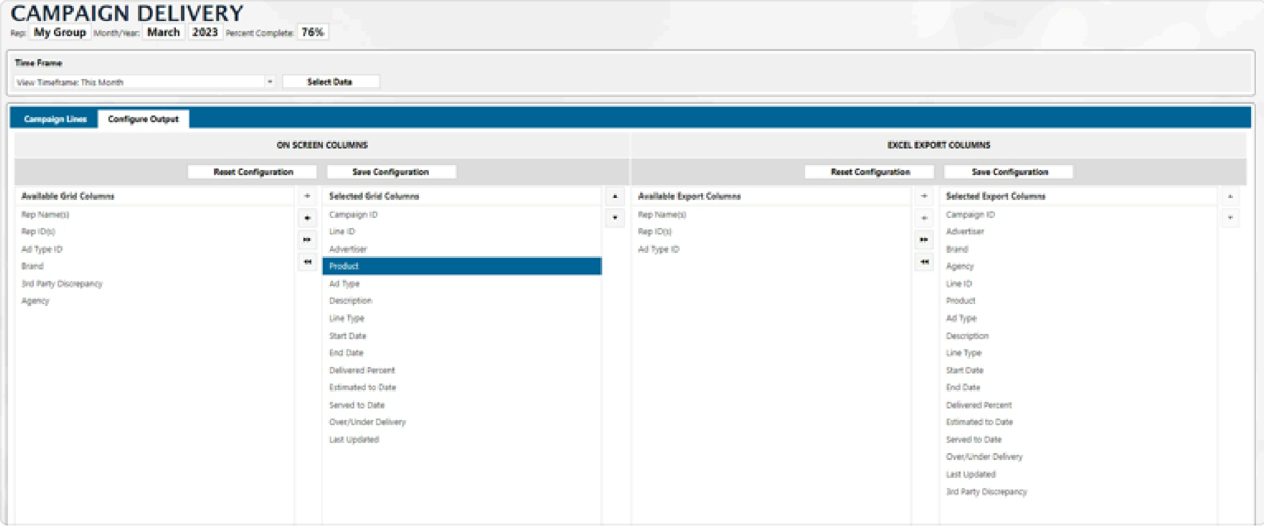
Digital Delivery Report Customization

The Digital Campaign Delivery report can now be customized by user, similar to some of our other report screens.

Previously the screen looked like this:

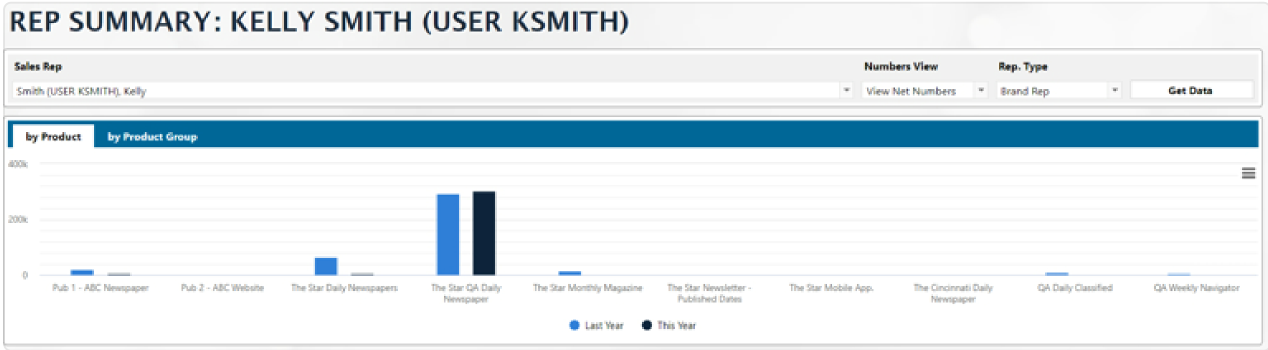


Now there is another tab, so that you can choose which fields you would like to see in the on-screen version of the report and in the Excel output version of the report.



✅ Rep Summary Report - Product Names

On the Rep Summary Report, previously if you had more than 6 products listed, the Product ID would be displayed instead of the Product Name. Now we will display the Product name for up to 20 Products before reverting back to the ID. Here is a preview of what it looks like:

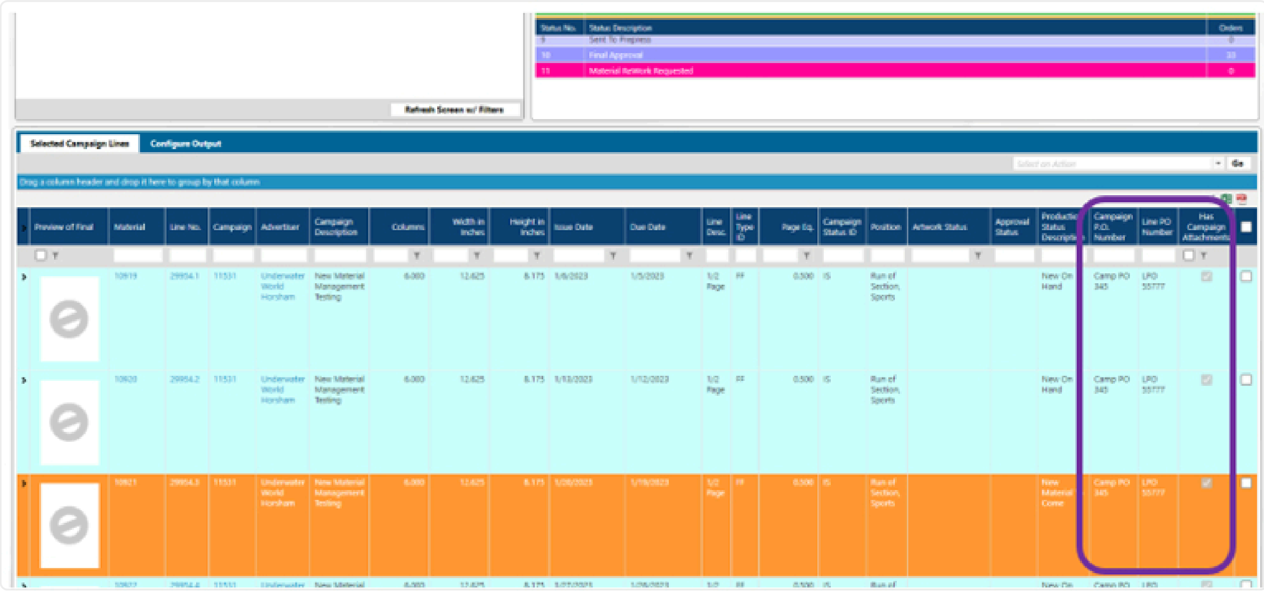


✅ Production Reports - New Fields

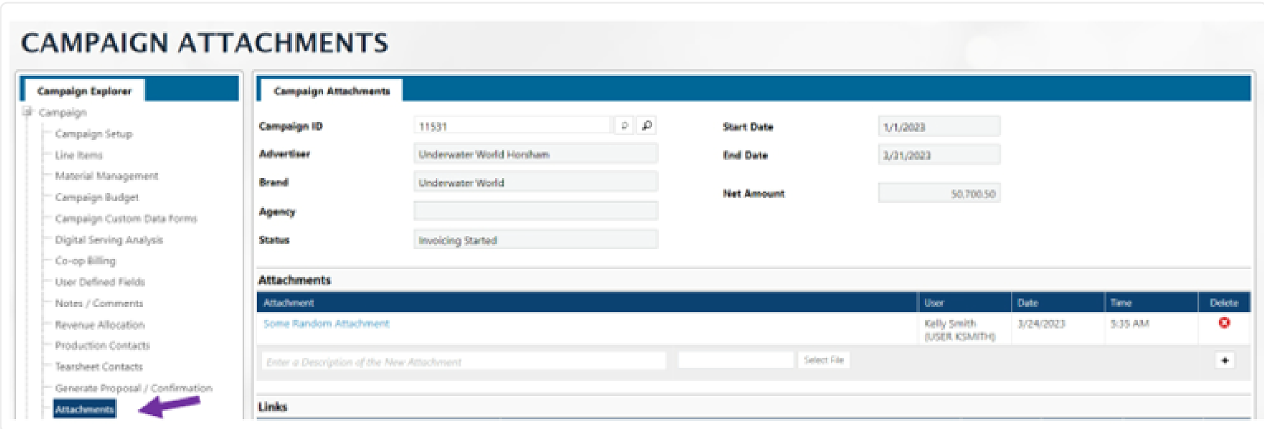
Three new fields were added to the Production Reports based on feedback in the Enhancement Portal. (Print Production Report, Non-Print Production Report, Production by Product Group, Production Control by Controller & Production by Sales Rep)

- Campaign PO Number
- Line Item PO Number
-

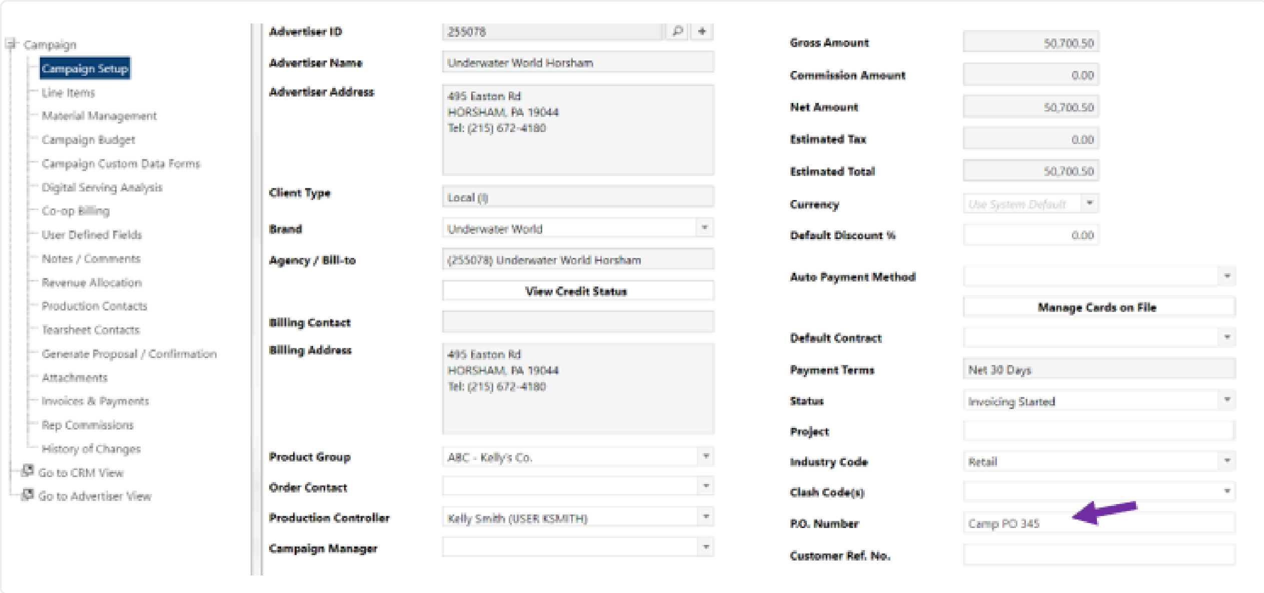
- Flag to indicate that there are attachments on the campaign



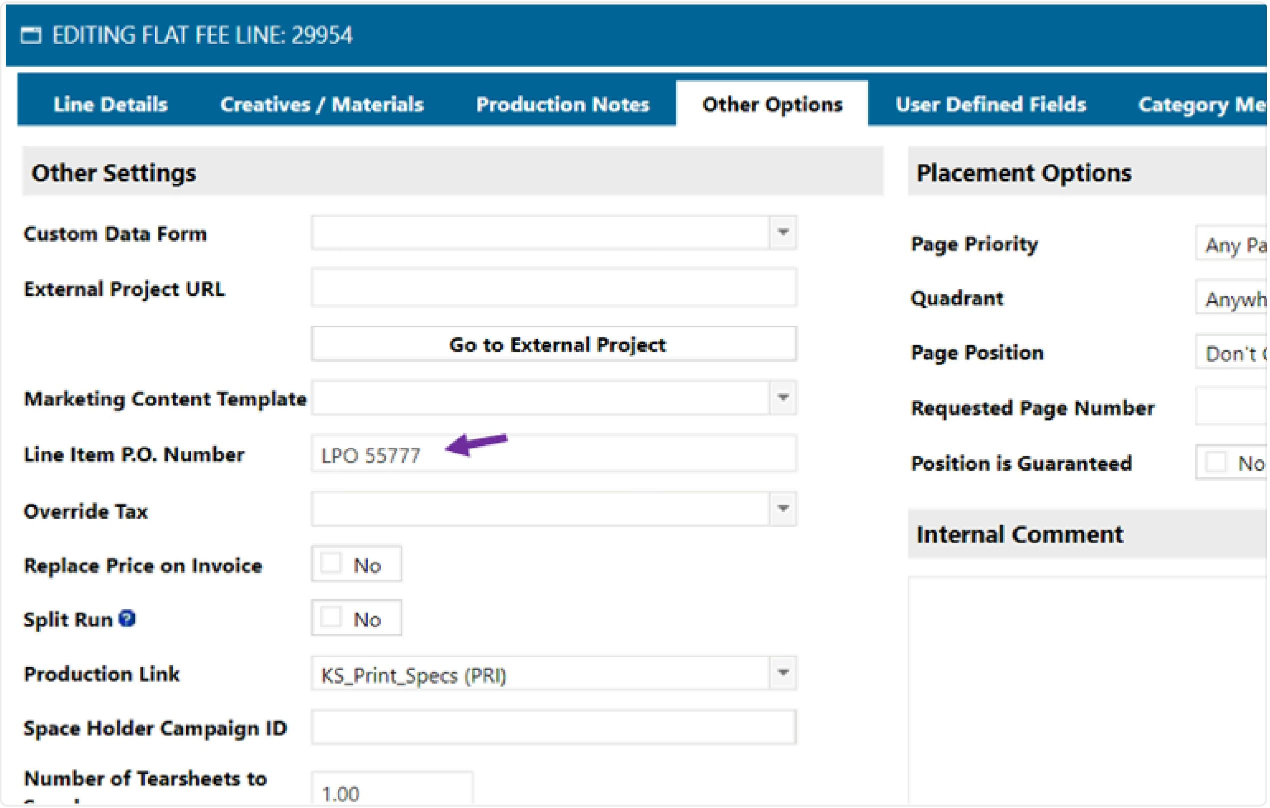
Attachments are found here on the Campaign → Attachment node:



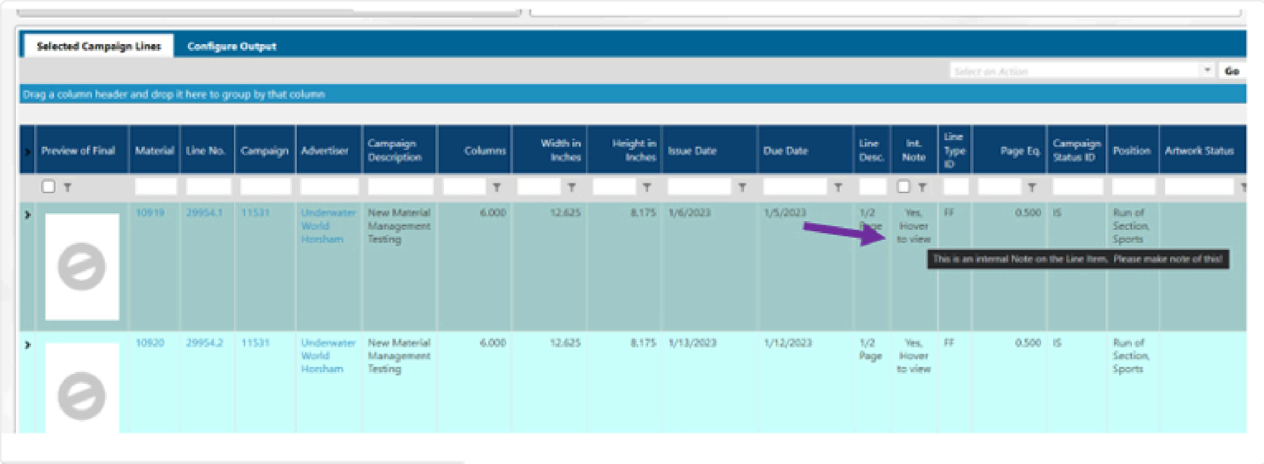
Campaign PO number comes from the Campaign header:



Line Item PO Number comes from the Line Item → Other Options Tab

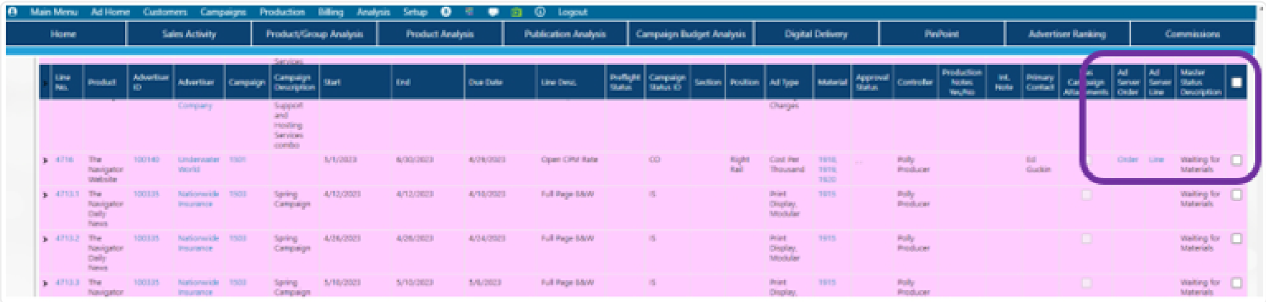


Also on the Production Reports, the Internal Note on a line item now allows the user to hover to view the text of the internal note.

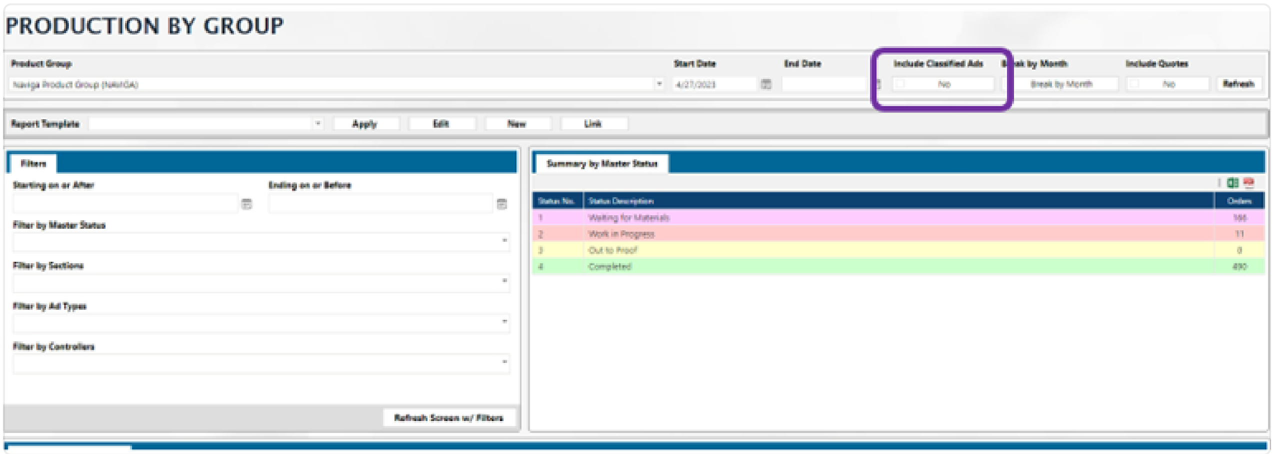


Production by Product Group report

The Production by Product Group report now has optional fields for the Master Status Description, GAM campaign link and GAM order link.

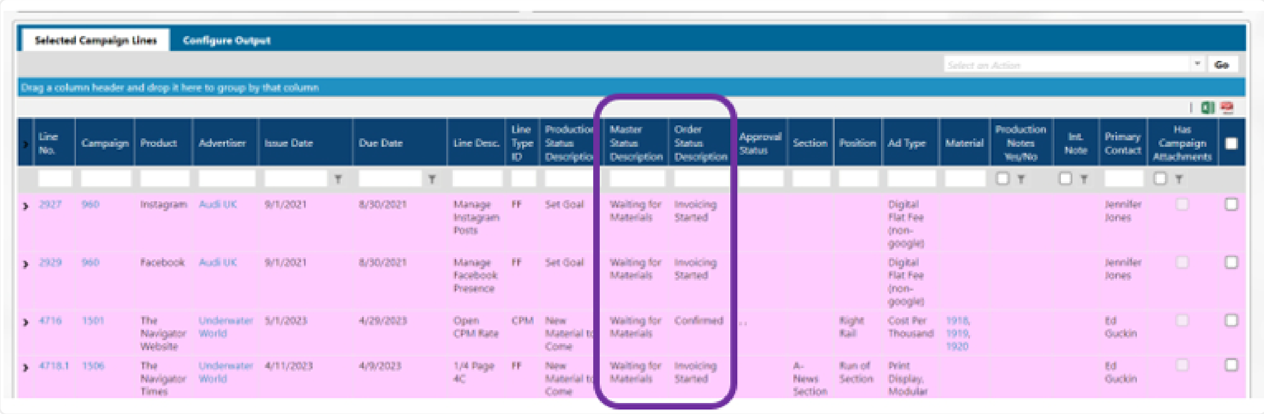


The Production by Product Group report also now has the flag at the top to include/exclude classified liner ads. (This was already on the Production by Print Product report, but has been added to this one as well.) This mod was also patched back to 23.1, so it will also be available there on builds later than April 26th.



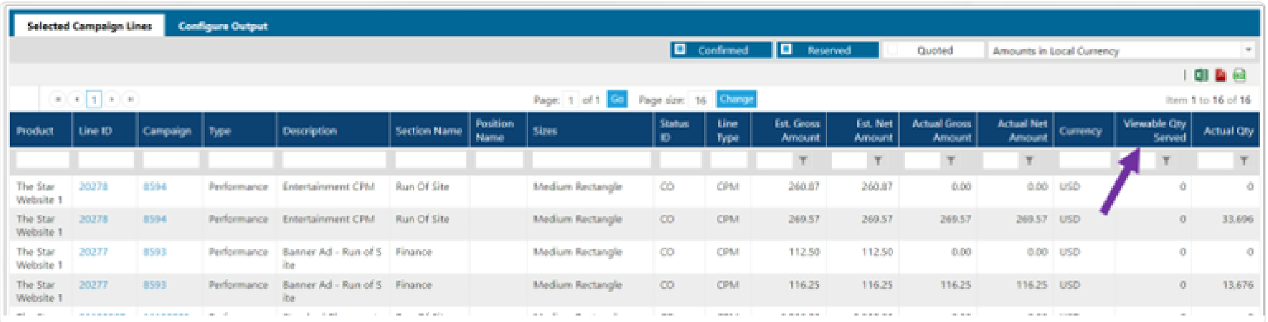
Production by Controller report

Master Status Description and Order Status Description have been added as optional fields in Production by Controller report.



✅ Orders by Product Report - New Field

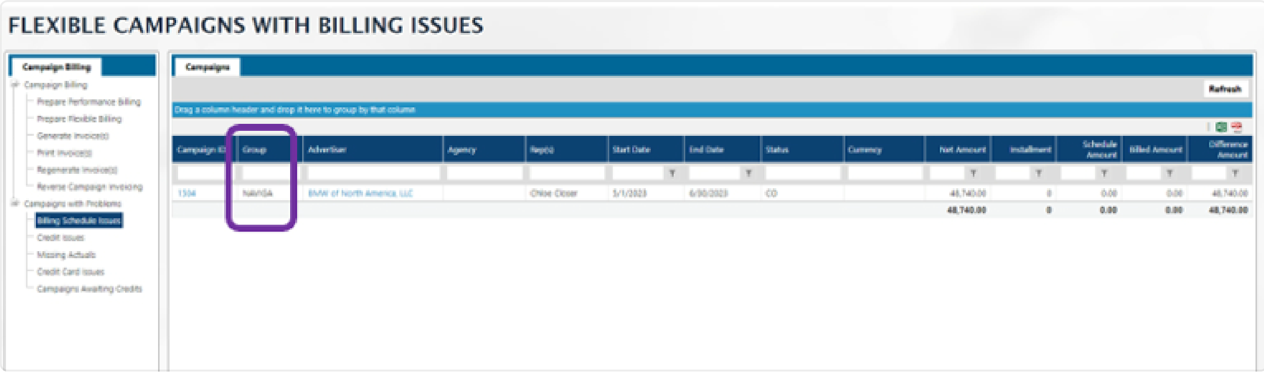
The Ad Server Viewable Impressions has been added to the Orders by Product Report based on feedback from the Customer Enhancement portal.



> ⓘ The Delivery/Pacing report and also the Reconcile actuals report both have this information as well, but if it is helpful to you to have it viewable in the Orders by Product report, we have added it there too.

Flexible Campaigns w/Billing Issues

In Campaign Billing → Campaigns with Billing Schedule Issues, there is a new column in the data for Product Group. This column is filterable as well, so that users can easily filter and focus on fixing the campaigns they need to bill right now.



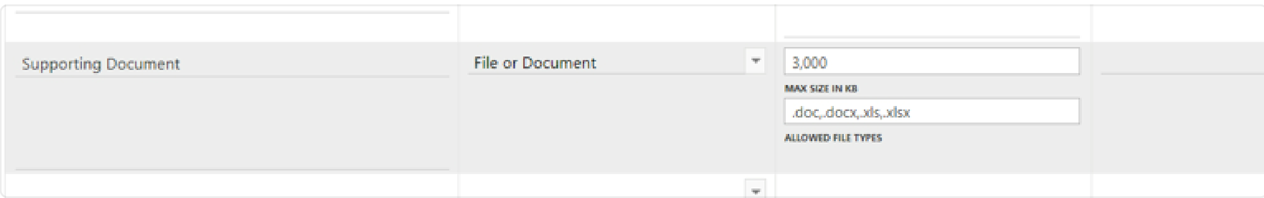
Commission Adjustment Import

This import has actually been in the system for a while, but it wasn't previously on the menu. In 2023.2, we have added it to the menu. Please see Commissions section for full documentation of the feature.

Depending upon how you set up your menu security, you might need to revisit menu security to show/hide this option to certain user groups.

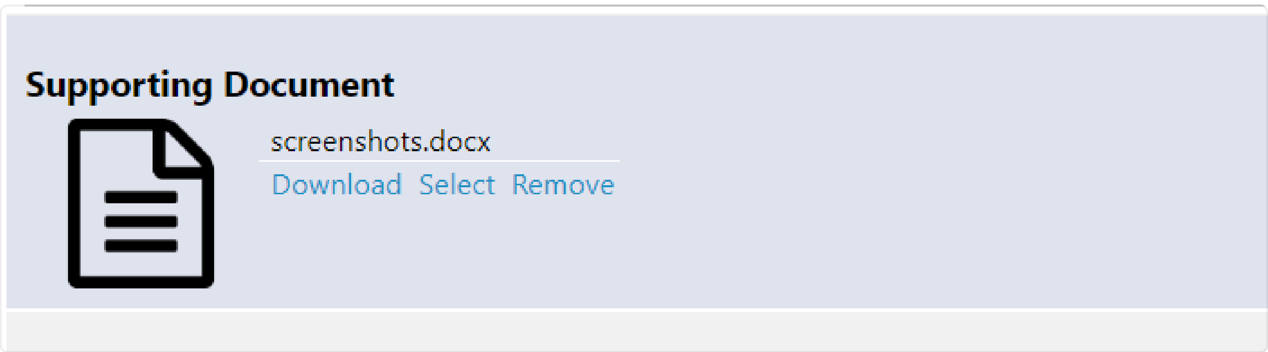
Custom Data Forms - Document Upload

There is now support on custom data forms for uploading documents to the form.



- Give the Label/Question a name
- Select File or Document as the Prompt type
- Enter (in kb) the maximum file size allowed
- Add the file types allowed (comma separated if multiple types are allowed)

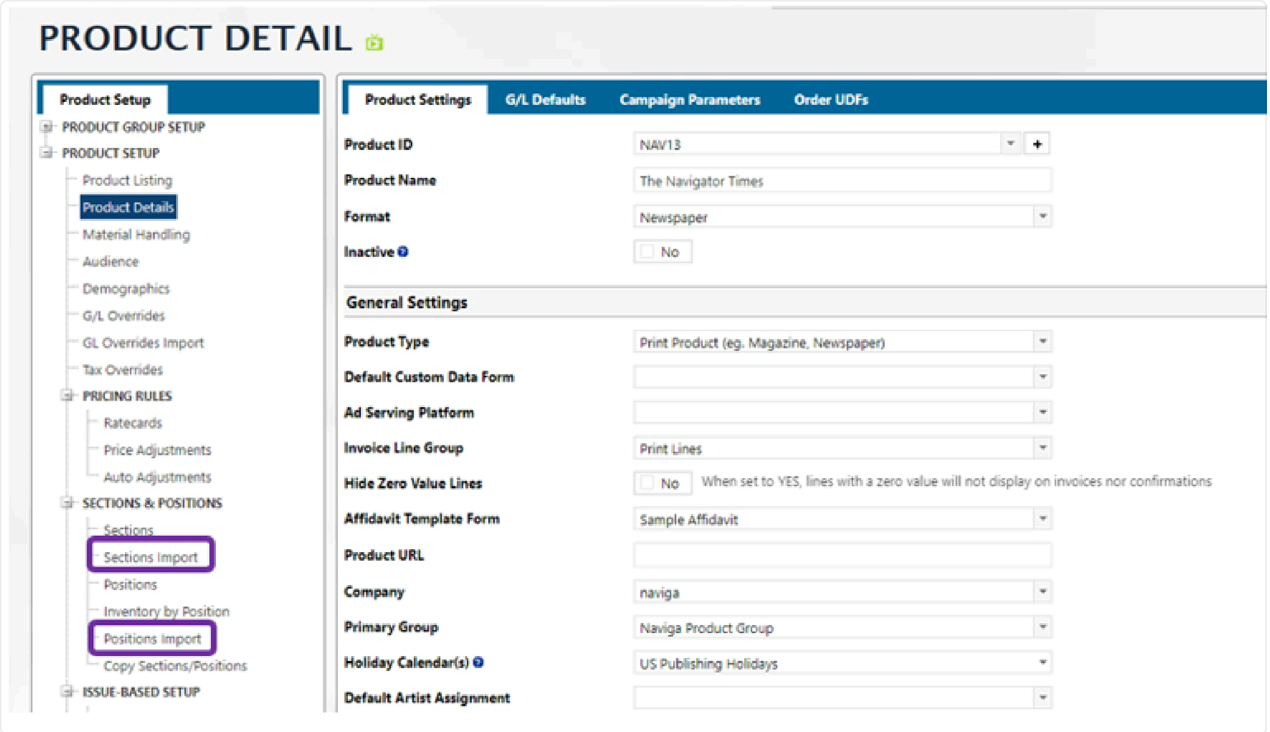
When accessing the form in the system (in Production reports, campaign entry, tickets, opportunities, etc), the user will have the ability to upload the file to the system. Once uploaded, other users can see that a file has been attached and can download the form by clicking the "download" option.



> Note: While custom forms can now be seen by clients using the Advertiser Portal, the document upload prompt is not currently supported in the portal.

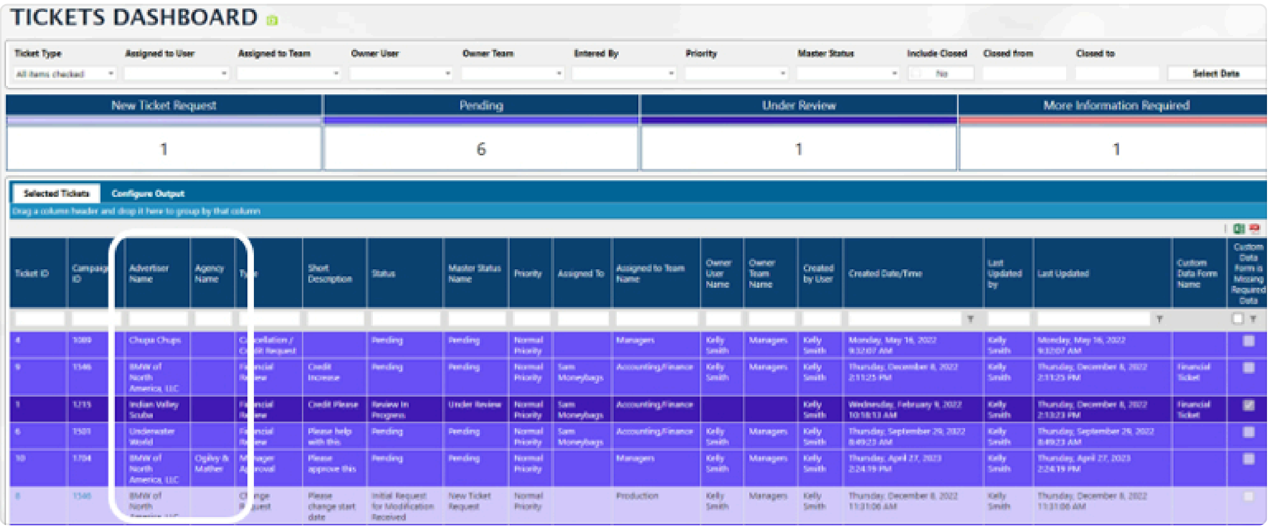
Re-import Sections and Positions

Using the Section Import and/or the Position import on a product, you can now update sections and positions using the import templates. In prior releases you would get an error message indicating the section/position already exists. Now you will get a success message and the sections/positions in the import will be updated with what is in the import file.



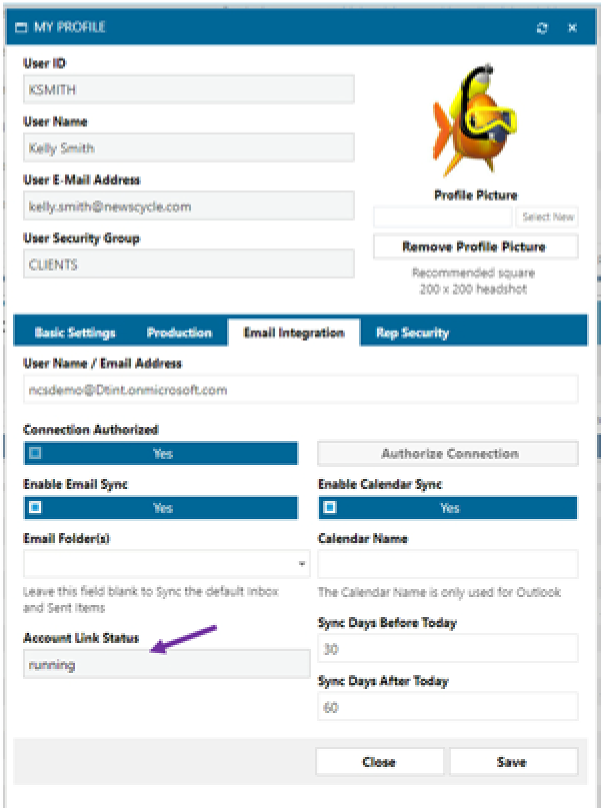
New fields added to Ticket Dashboard

Four new fields were added to the configure output tab on the tickets dashboard. Below I am displaying the Advertiser and Agency Name. Both ID's are also available to display, if desired.



Nylas Account Link Status in my Profile

The My Profile screen now also shows the link status to give users insight into the status of their connection. In Previous versions we only showed the connection was authorized if it was in a "running" status, but there could be other valid statuses that aren't yet at the running stage. The new Link Status gives additional insight.



Possible options here are: valid | invalid | downloading | running | partial | invalid-credentials | exception | sync-error | stopped | initializing

The meanings of each status is described below (taken from the [Nylas website](#))

Sync state	Simplified	Detailed	Description
valid	x		All emails for folders, contacts, and calendars are syncing reliably.
invalid	x		The account has an authorization issue and needs to be re-authenticated.

Sync state	Simplified	Detailed	Description
downloading	x		All folders are connected and the account is in the process of syncing all historical messages on the account. Depending on the size of the account and the speed of the connection between Nylas and the email server, this can take up to 24 hours or more to complete. During this time, the account is usable for sending messages and receiving new email messages.
running		x	All emails for folders, contacts, and calendars are syncing reliably.
partial		x	Partial states are typically temporary and may indicate issues with the mail server. Accounts in this state, however, are still running. One or more folders in the account may not fully sync currently or not sync mail at all. Typically, accounts recover and return to a full-running state. Some reasons an account may be in a partial state: • It's a new account and hasn't finished its initial sync. • The account was recently reauthenticated. • The user deletes, changes, adds, or restricts folders. •

Sync state	Simplified	Detailed	Description
			Slow network connections. • Low bandwidth on the email server. • A backlog within the Nylas platform. • A large number of folders in the user's mailbox. • Syncing historical data • The user has external integrations that may be slowing down their email server. • The user’s email server has connection or network issues. • Microsoft accounts with numerous folders.
invalid-credentials		x	You can only continue to use an account with the Nylas API as long as the <ACCESS_TOKEN> is valid. Sometimes, this token is invalidated by the provider when connection settings are changed or by the end-user when their password is changed. When this happens, reauthenticate the account and generate a new <ACCESS_TOKEN> for the account.
exception		x	This can occur if an upstream provider returns an error that Nylas's sync engine doesn't yet understand. Please contact Naviga Support for accounts in this state.

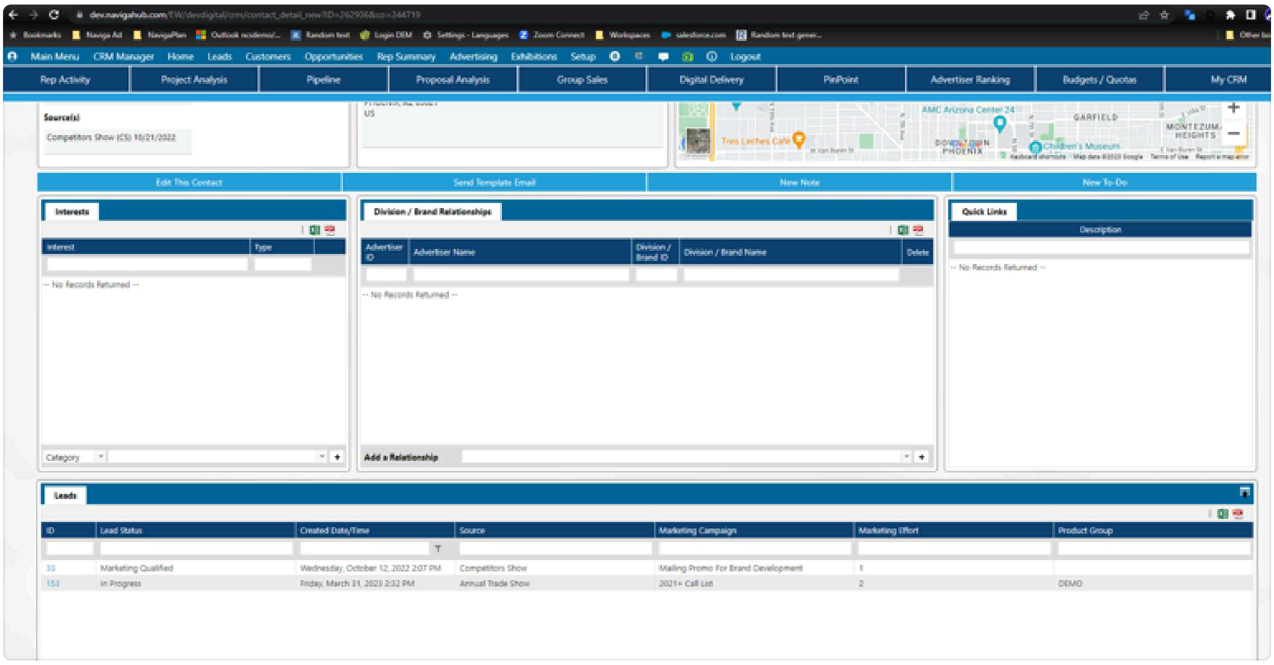
Sync state	Simplified	Detailed	Description
sync-error		x	An unexpected error was raised while syncing an account. Please contact Naviga Support for accounts in this state.
stopped		x	An account stops syncing if it repeatedly encounters the same error or is unable to access the email server. In cases where an account has stopped, you can try to restart it using the downgrade and upgrade endpoints. If the account continues to fall into a stopped sync state, please contact Naviga Support.
initializing		x	The account has been authenticated on the Nylas platform and is in the process of connecting to all the account's folders. Accounts that use email.send as the only scope will always be in an initializing state. Nylas uses folders to determine sync status. email.send

CRM Module

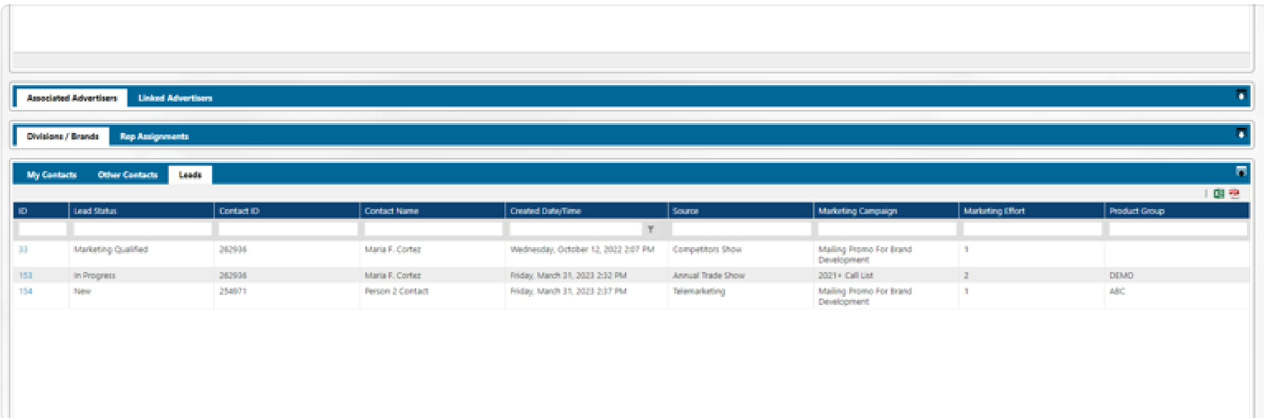
Leads History on Account/Contact

The Leads that an account or a contact person are linked to are now displayed on the contact person record and also on the account record.

On the contact person:

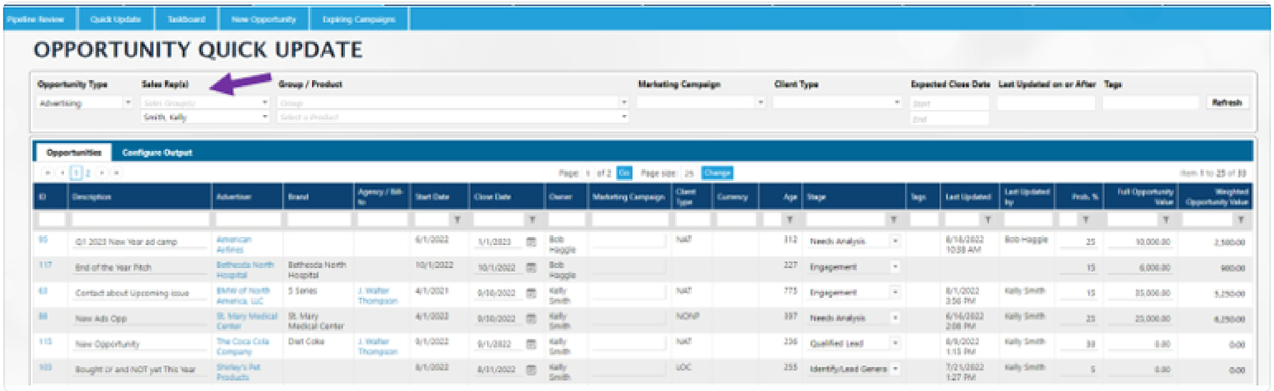


And on an account record. The account record might have multiple contact people on the account who are linked to a lead.



Opportunity Quick Update - Rep Group

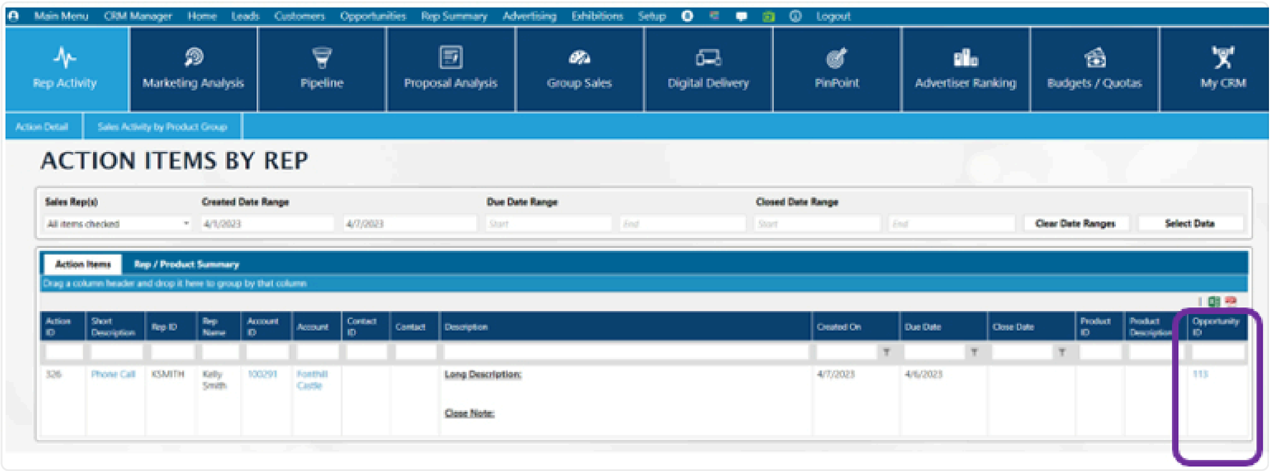
For those with a Rep Manager type role, on the Opportunity Quick Update screen, there is a new filter available for rep group. This helps a sales manager with multiple rep groups to quickly filter on a group of reps without having to select everyone individually.



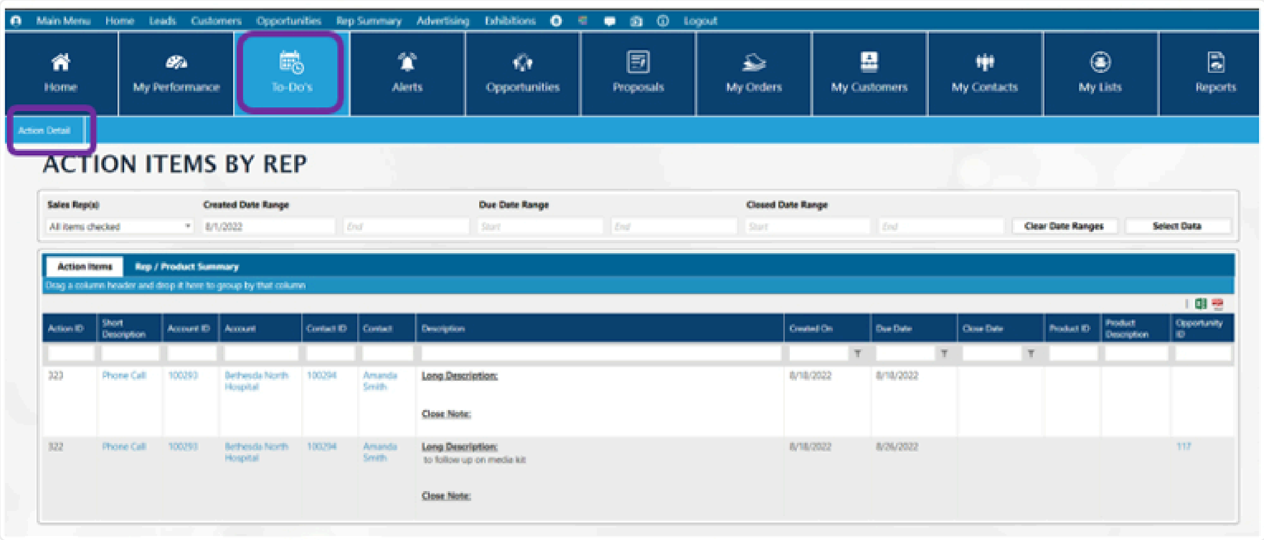
Action Item by Rep Report to include Opportunity ID

There is a new column in the Action Items by Rep Report - Opportunity ID. You can click on the ID to be taken to the Opportunity.

As a CRM Manager, navigate to the Action Items by rep report by selecting CRM Manager → Action Items by Rep



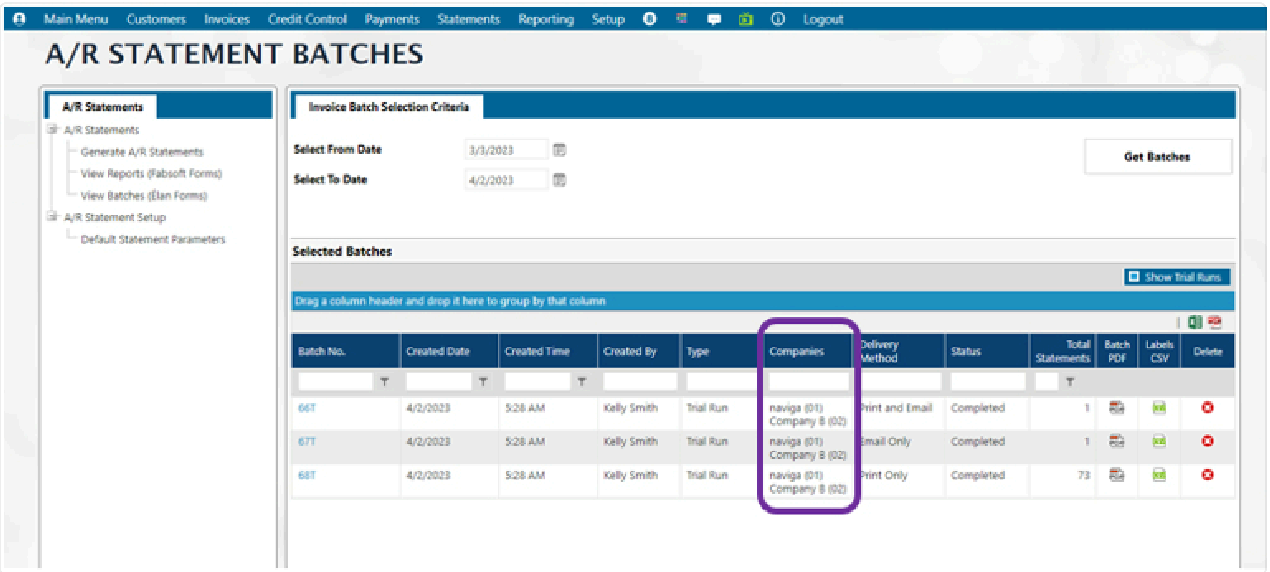
As a regular rep, you can also see this report by first clicking on the "To Do" navigation box in the CRM Module and then clicking the sub-navigation box called "Action Detail." This report is aware of your permissions and will only show you action items for yourself and any other reps you are permitted access to.



Accounts Receivable Module

Company Column in Statement Batch List

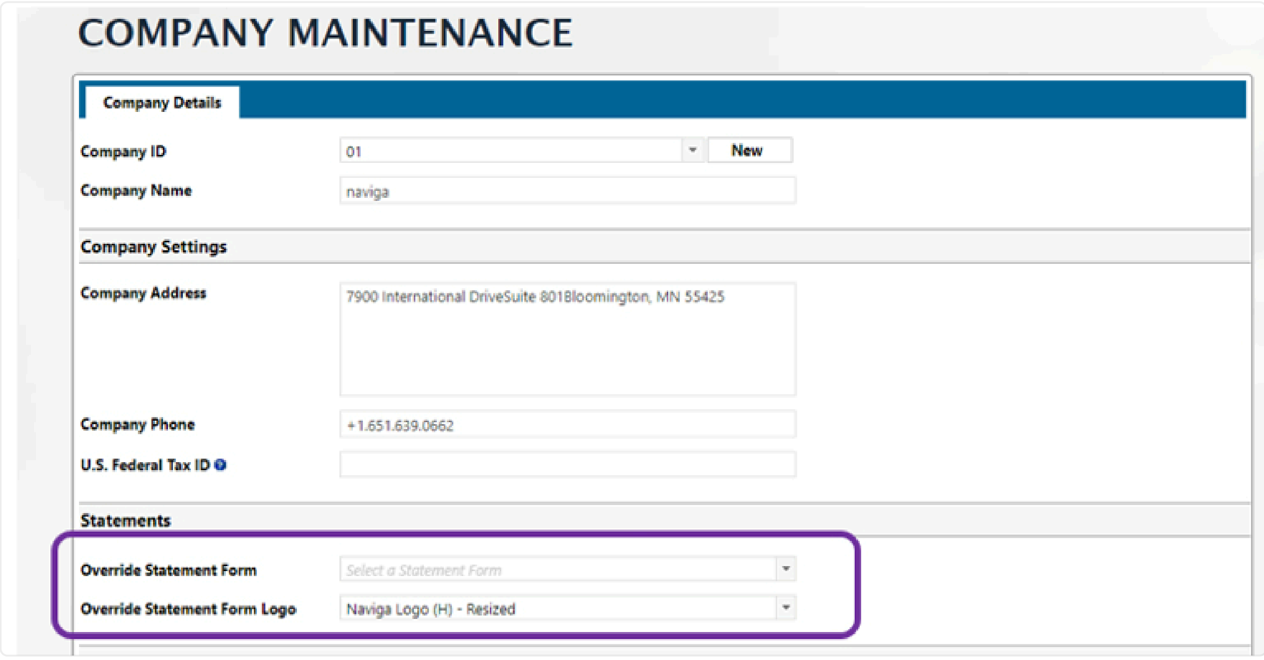
When viewing the list of batches in A/R Statements, there is now a column displaying the Company(s) which were included in that batch.



Override Statement Form/Logo by System Company

For multi-company environments, you can now override the logo on your statement or even the form template itself at the company level.

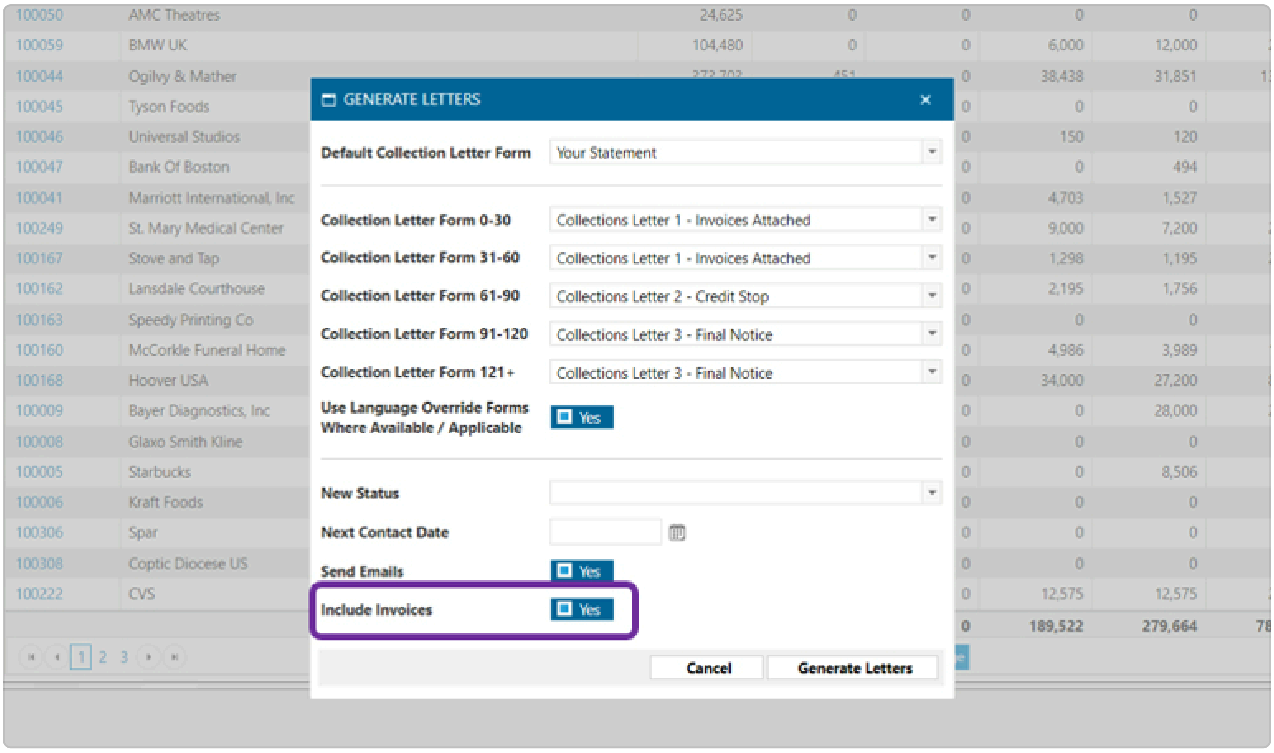
Navigate to System Settings module → Setup → Company Setup



Select the desired company from the company ID dropdown at the top and then in the Statements section, select the override Statement form and/or Override form Logo.

New Option for Collection Letters

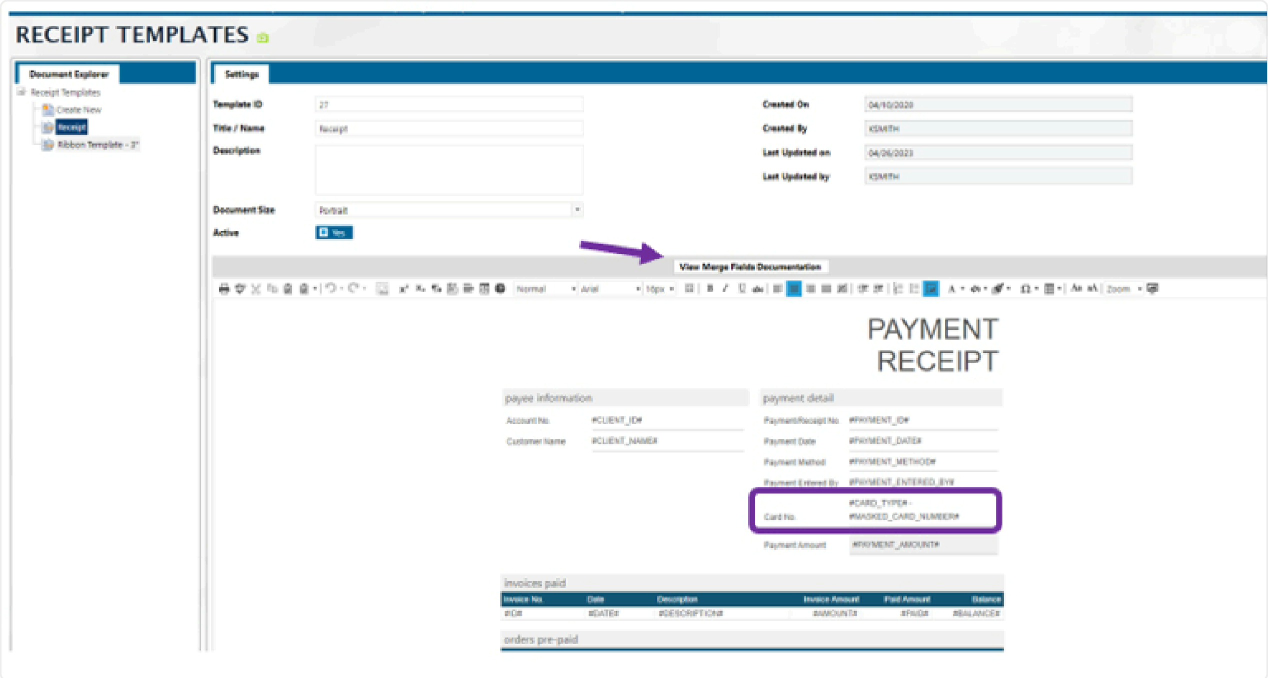
When emailing collection letters, there is a new option now to include the invoices as an attachment to the email.



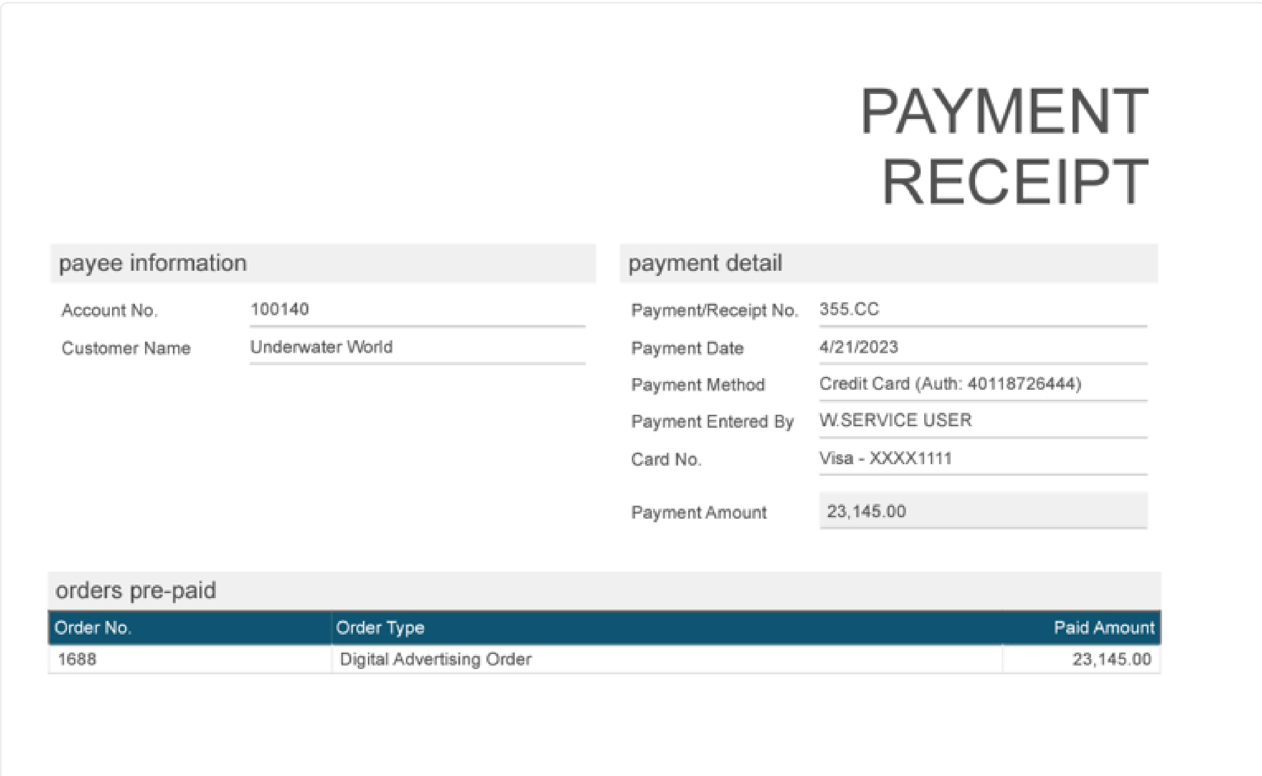
This is set to "yes" by default, but can be unchecked if you to not wish to include the open invoices as attachments.

"Card Type" added to Payment Receipt Template

A new merge tag has been added for credit card receipts. You can now use #CARD_TYPE# to indicate VISA, MC, etc on the payment receipt. (See Merge Fields Documentation onscreen for all available merge fields)



Example receipt output:



PAYMENT RECEIPT

payee information	
Account No.	100140
Customer Name	Underwater World

payment detail	
Payment/Receipt No.	355.CC
Payment Date	4/21/2023
Payment Method	Credit Card (Auth: 40118726444)
Payment Entered By	W.SERVICE USER
Card No.	Visa - XXXX1111
Payment Amount	23,145.00

orders pre-paid

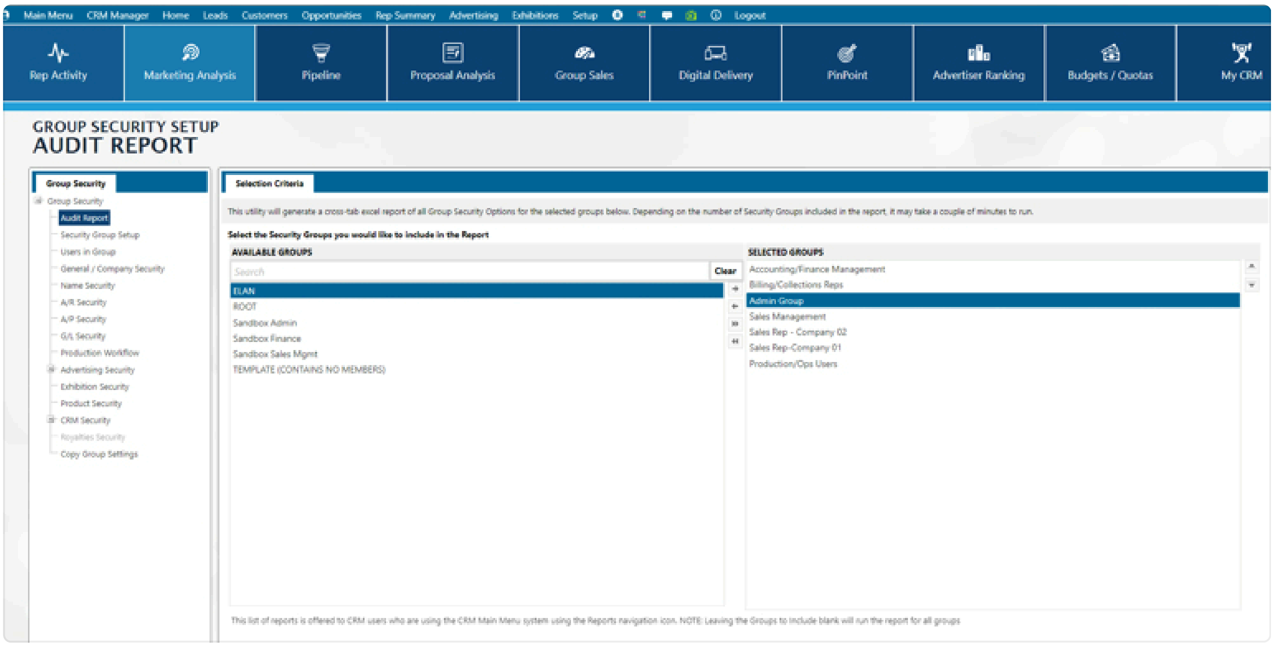
Order No.	Order Type	Paid Amount
1688	Digital Advertising Order	23,145.00

General / Admin Module

Audit Report

There is now an audit report option on the Group Security screen. Navigate to Group Security from the Setup Menu and select the Audit Report at the top of the screen.

Select any desired groups from the left column and move them into the right column using the arrows in the center.



Click Generate report button at the bottom of the screen. Depending upon the number of groups selected, this could take a couple of minutes to run. The following excel report will automatically download.

⚠ With over a dozen tabs and each tab having a column for each security group - this isn't a report you should be running for dozens of groups at a time. The process will time out after 90 seconds. If the spinning graphic closes and no file is downloaded, you have requested too much data. Actual number of groups a site can download successfully will vary based on the number of users you have in the system and the data being downloaded, but I would advise against attempting more than a dozen groups at one time.

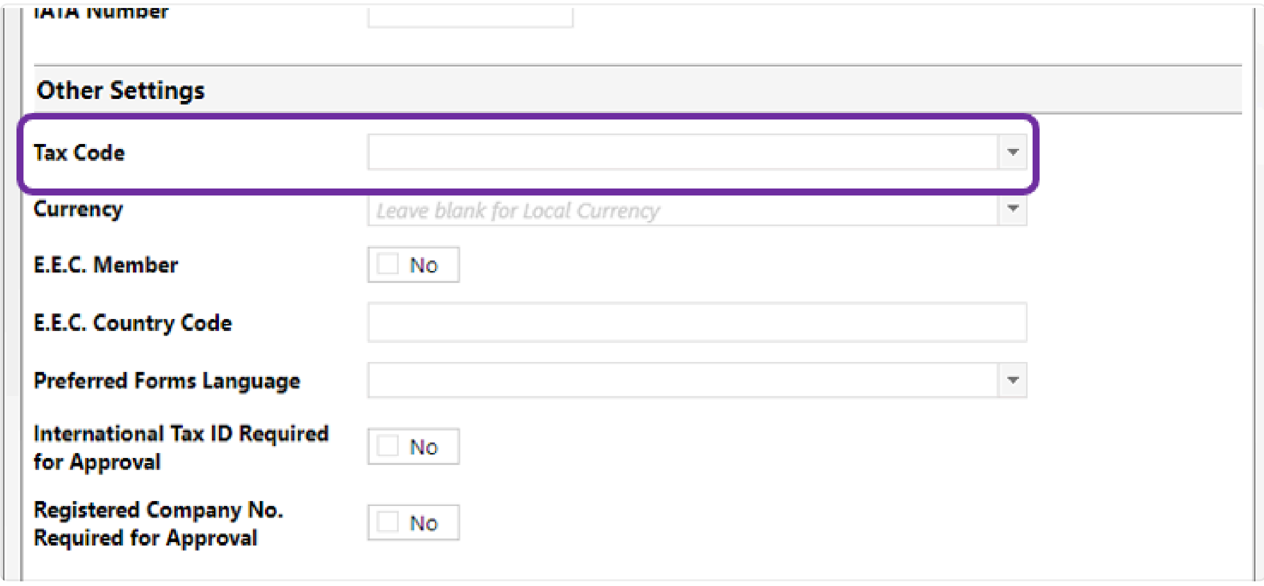
Module Access	ACCTMGR	ACCTUSR	CLIENTS	SALESMGR	SALESUSR02	SALESUSR	PRODUCTION
Accounts Payable	Yes	No	Yes	No	No	No	No
Accounts Receivable	Yes	Yes	Yes	No	No	No	No
Administration	No	No	Yes	No	No	No	No
Advertising	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Credit & Collections	Yes	Yes	Yes	No	No	No	No
Customer Relationship Management (CRM)	No	Yes	Yes	Yes	Yes	Yes	Yes
Exhibition	Yes	Yes	Yes	Yes	Yes	Yes	Yes
General Ledger	Yes	No	Yes	No	No	No	No
Informer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Newsstand	No	No	No	No	No	No	No
Production	Yes	Yes	Yes	Yes	Yes	Yes	Yes
System Initialization	No	No	Yes	No	No	No	No

Module Security | Menu Security | Name Security | AR Security | Digital Security | Company Security | GL - Grou ...

The selected security groups will be across the top and the modules, menus and permissions that the user group has will be displayed. Note the multiple tabs across the bottom of the report. This separates Module Security, Menu Security and then all of the Group Security nodes (note "Digital Security" is Advertising Security on screen), and then finally after all the Group Security tabs is a list of active and inactive users along with which security group that person is in.

Default Tax Code by Country

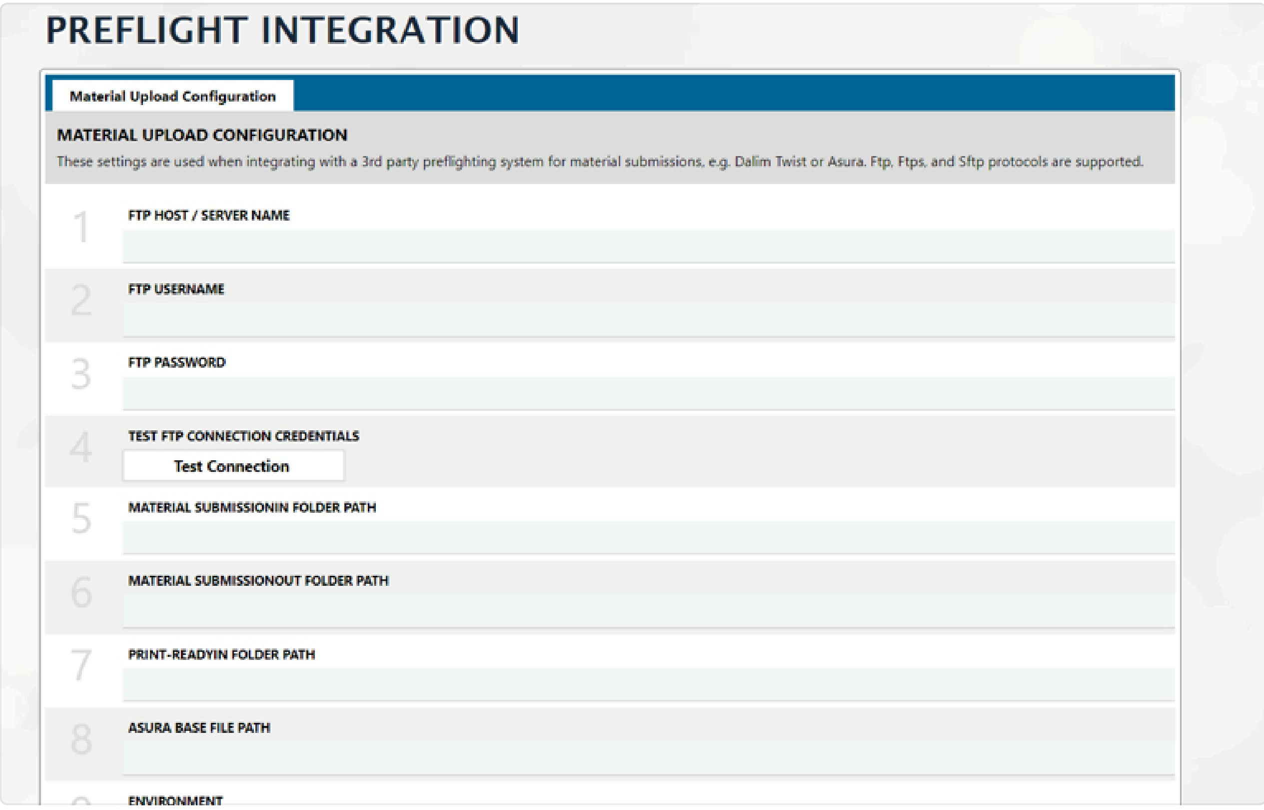
Navigate to Setup → Address Setup. In the "Other Settings" section of Country Setup, you now have the option to set a default tax code for the country.



Advertiser Portal

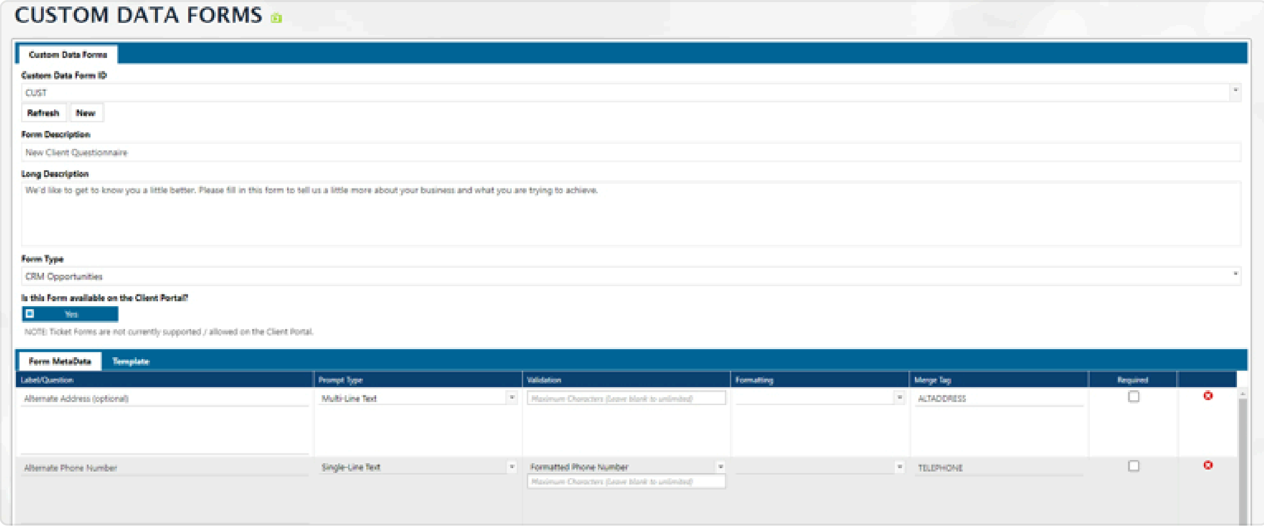
Preflight settings moved

Previously, Preflight connection settings were on the portal setup so that when a client would upload material through the portal the system would understand what ftp folder we needed to drop the material into so that your preflight process could pick the material up and and then pass it back to us. When Internal users are uploading materials to pass to preflight, the system isn't necessarily aware of the "Profile" anymore to know which Preflight configuration to look at. Therefore we pulled the Preflight settings out of the portal setup and it's on its own configuration page. Portal users and internal users will look at the same central location to understand preflight settings. These can be found under Setup → Admin in the Advertising module.



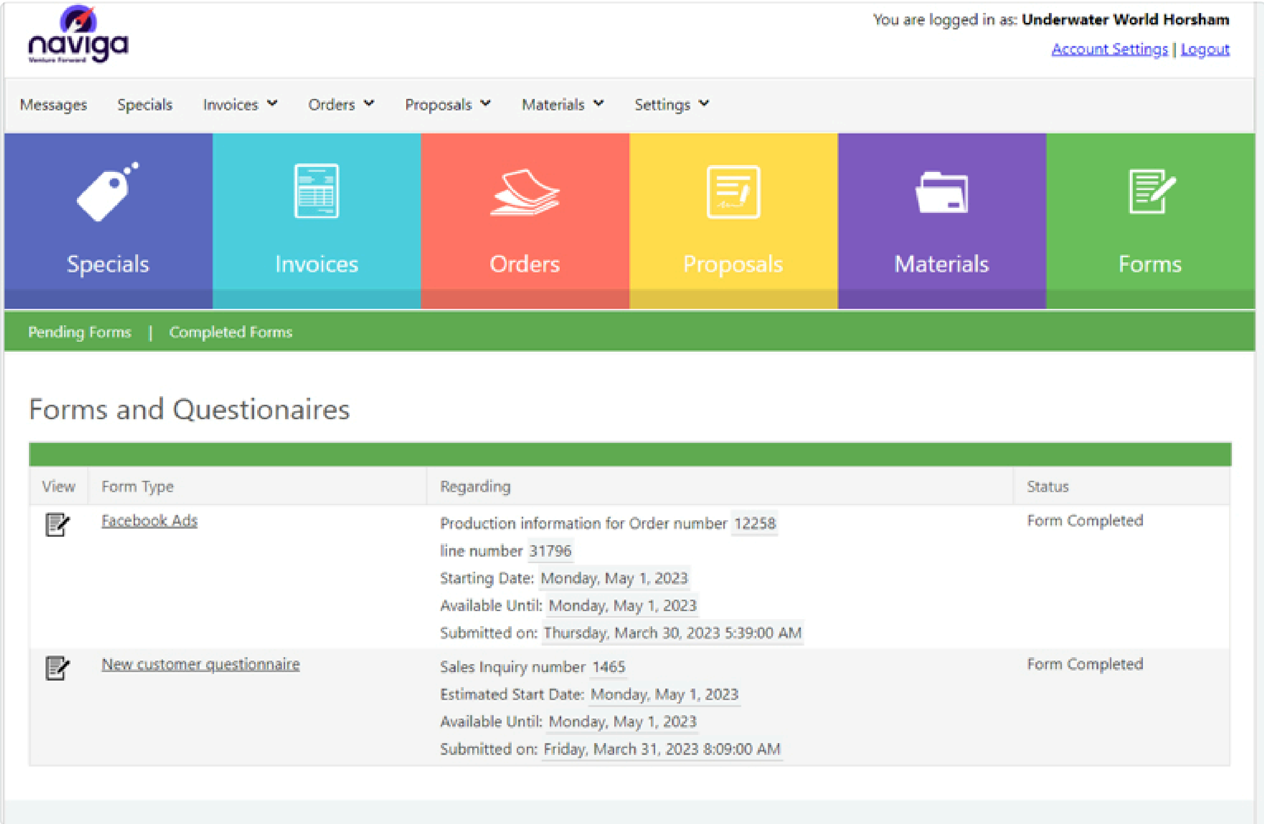
Forms on the Portal

Custom data forms have been in the system for quite a while now, but they were really for internal use until now. Now you can indicate in Custom Form setup if a form should be allowed to be used in the portal. By default it will be deselected, so after upgrading, you will have to turn it on for any forms that you wish to have customer-facing.

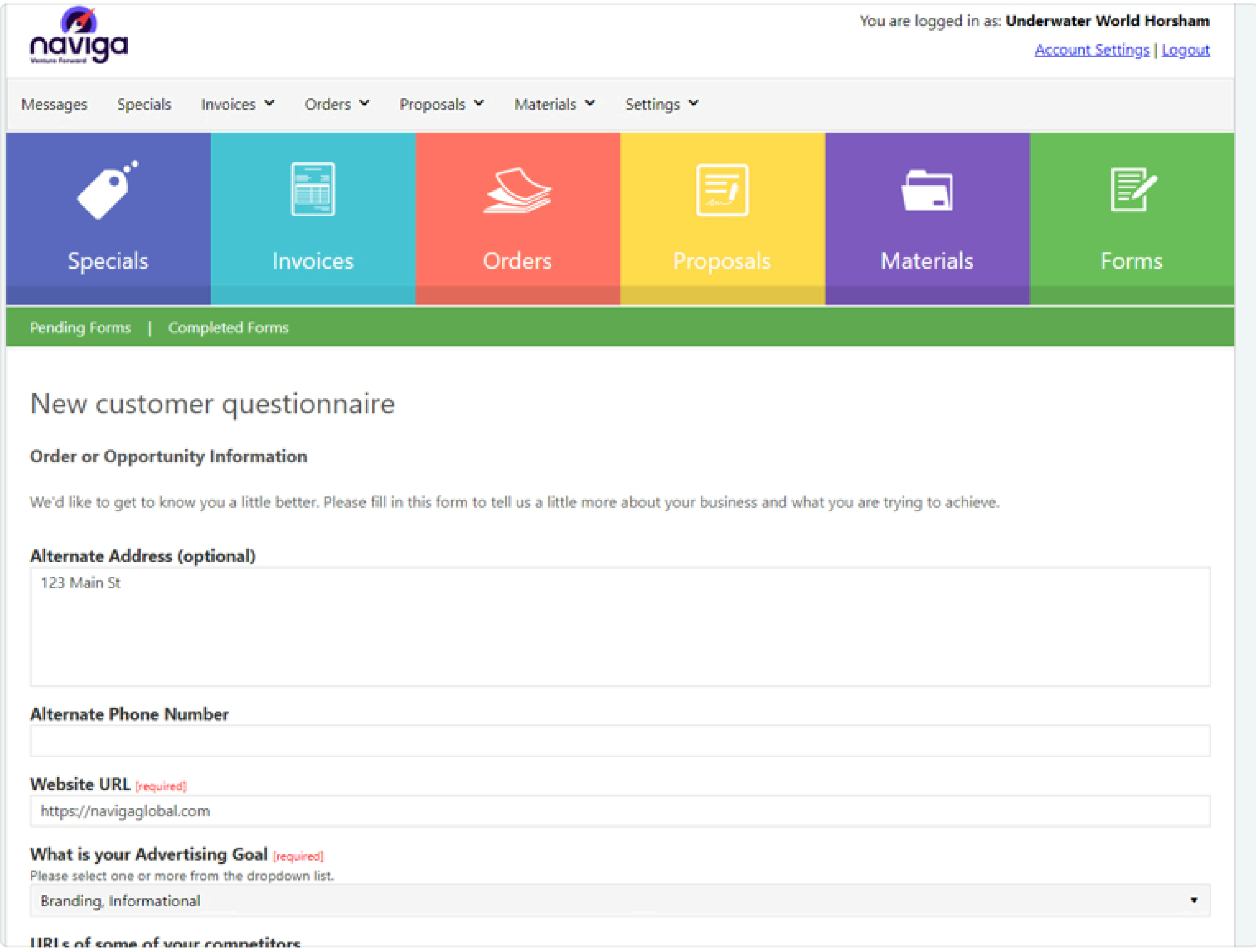


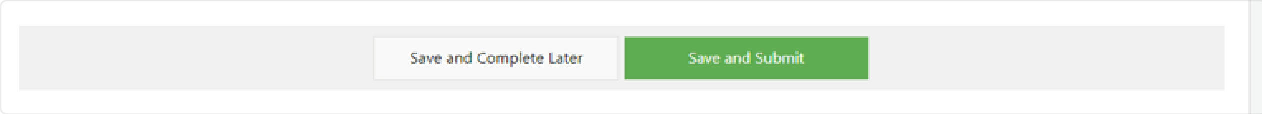
There is now a long description box at the top if you want to give your client some instruction related to the form. And below each Label/Question in the above screenshot there is a box where you can be a little more verbose and give some instruction related to the specific form question.

Then from the client portal, the client will be able to see available and completed forms



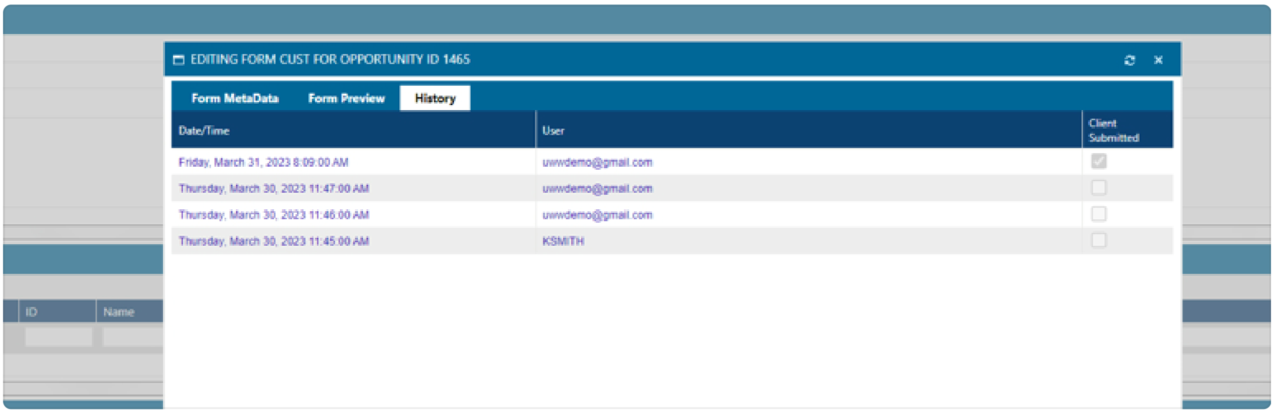
The customer can select and then fill in the form and submit their responses:



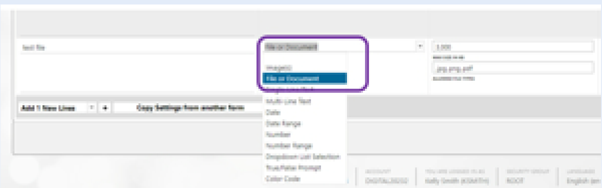


At the bottom of the form the customer can save if they wish to complete later or can save and submit. Upon submission, if it is an opportunity form type, then the sales rep on the opportunity will receive a CRM Alert and an email. If it is related to an order line, the rep on the order will receive the CRM Alert and email and the Production Controller on the campaign will also receive an email.

Internally, on the form, there is now a history so you can see who saved it and when and whether or not the customer submitted the form.



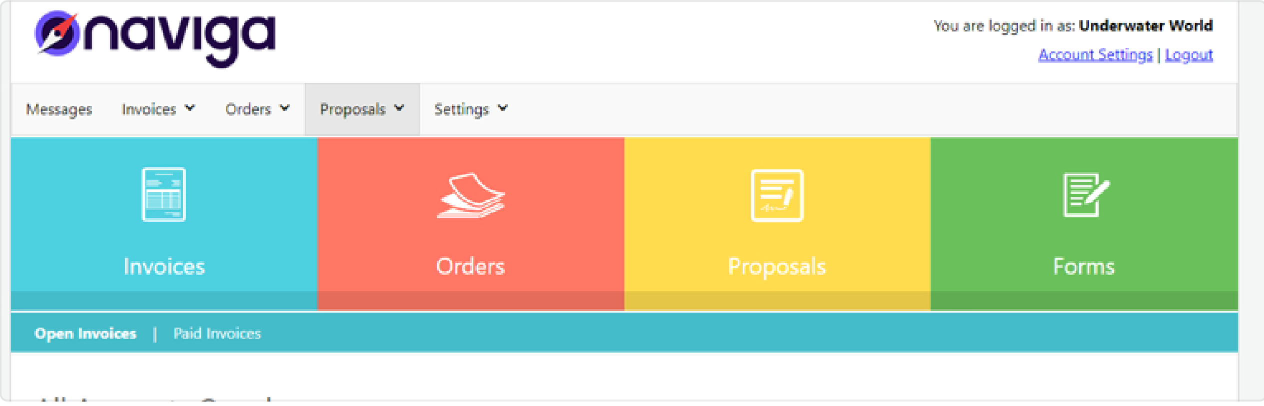
NOTE: for INTERNAL users, you can set up image and file/document upload question types on forms. The File/Document support is new for 23.2. Both of these are not yet supported on the portal and will be hidden from client view if they are setup on any forms that otherwise display on the portal.



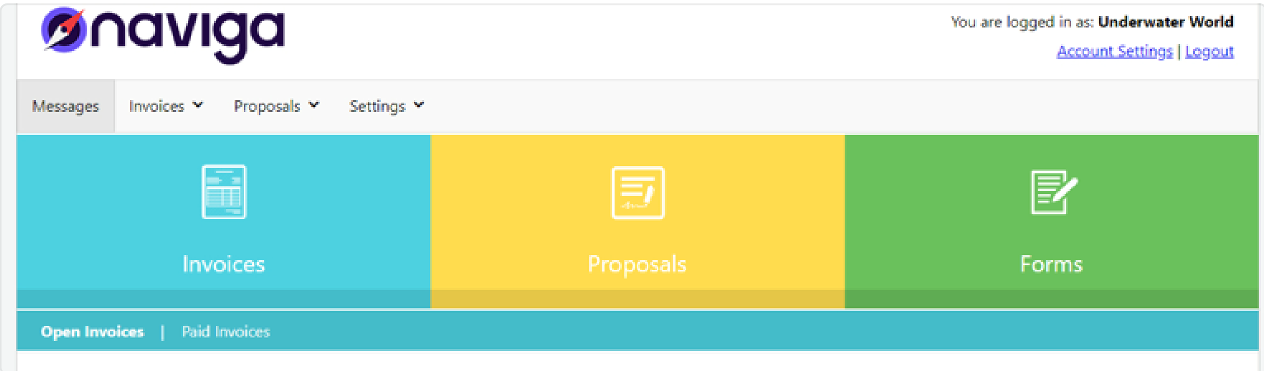
Disable Navigation Options

We've always had the option to disable some of the features on the portal if you choose not to use some of them. Previously, the navigation button would remain, but you could display a message to the client rather than the system information for that box.

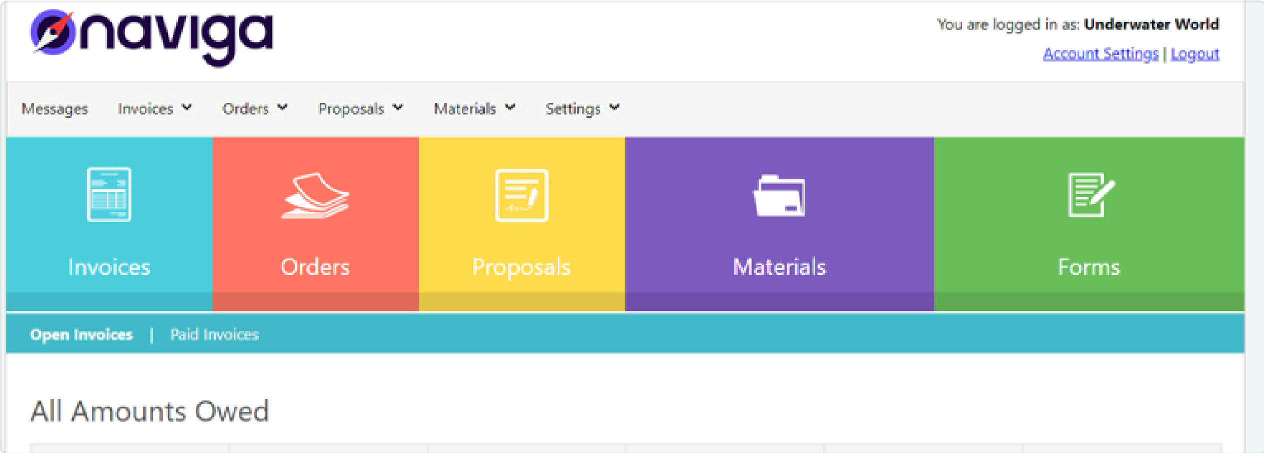
Now the navigation and page will be removed completely if you choose to disable certain items.



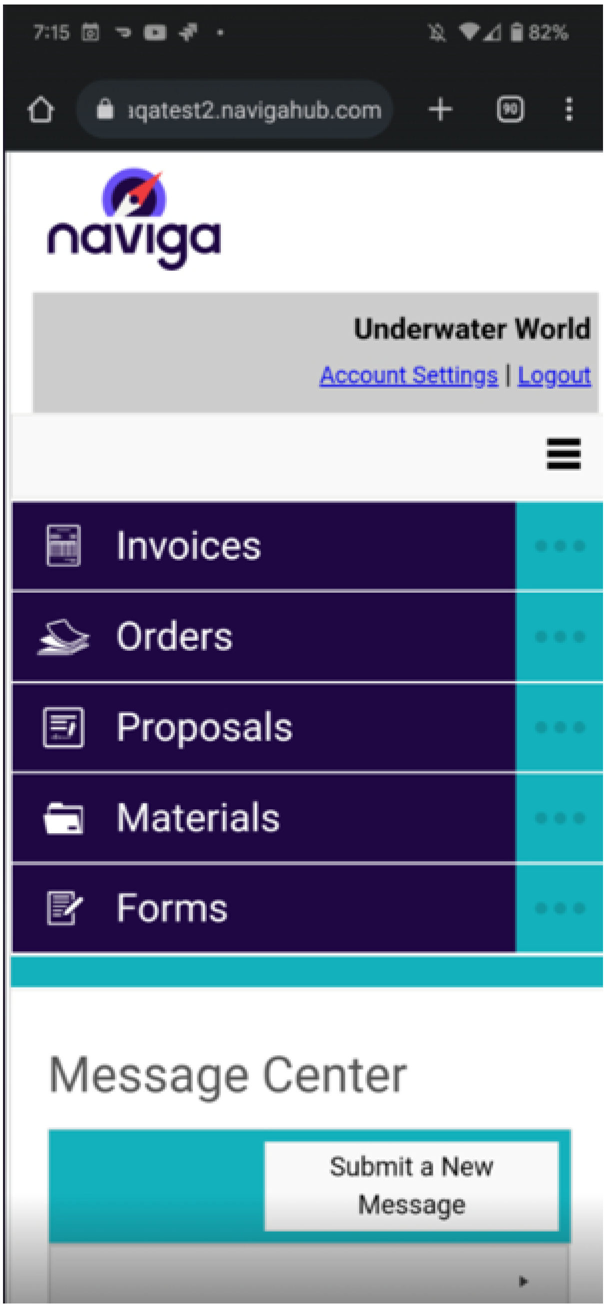
Previously, under the hood, these navigation icons were in a 6-unit grid and each button took up one unit. The way this was rendered, was dependent on browser size. For example, these would stack on a phone and be displayed in a row on a computer. Now, this is using a grid layout of 12-units. When you display all 6 navigation options, each navigation button will take up 2 units. When you disable all but 4 buttons or three buttons, those are easily divisible and will display evenly



If you display 5 buttons, the first three will be smaller than the last two...



When viewed from a mobile device, the icons are stacked, so it will not look uneven from that view.



If you disable all but one or two, the big boxes will disappear completely and you will only see the text row for navigation (in the non-mobile view above between the logo and the buttons)