

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.

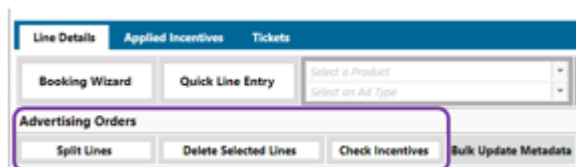
Important things to remember:

- 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.

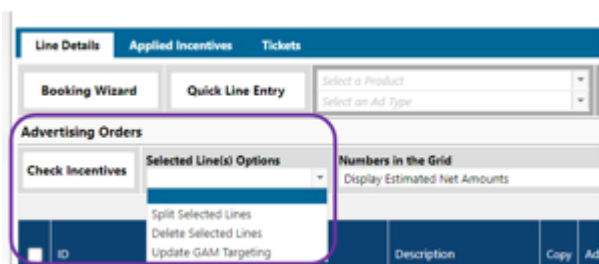
The screenshot shows the Google Ad Manager (GAM) interface. The top navigation bar includes links like 'Main Menu', 'Ad Home', 'Customers', 'Campaigns', 'Production', 'Billing', 'Analysis', 'Setup', and 'Logout'. The left sidebar contains a 'Campaign' menu with options like 'Campaign Setup', 'Line Items', 'Material Management', 'Campaign Budget', 'Campaign Custom Data Forms', 'Digital Serving Analysis', 'Co-op Billing', 'User Defined Fields', 'Notes / Comments', 'Revenue Allocation', 'Production Contacts', 'Teasheet Contacts', 'Generate Proposal / Confirmation', 'Attachments', 'Invoices & Payments', 'Rep Commissions', 'History of Changes', and 'Go to CRM View'. The main content area is titled 'Line Items' and shows details for a campaign named 'Underwater World'. It includes fields for 'Brand', 'Agency', 'Status', 'Incentives Status', 'Advertiser Proposal ID', 'Advertiser Budget', 'Commission Amount', 'Net Amount', 'Estimated Tax', 'Estimated Total', and 'Currency'. Below these fields, there are tabs for 'Line Details', 'Applied Incentives', and 'Tickets'. The 'Line Details' tab is active, showing a table of line items. The table has columns for ID, Product, Description, Copy, Ad Type, Start Date, End Date, Total Estimated, Estimated to Date, Served to Date, Over/Under Delivery, Last Updated, 3rd Party Discrepancy, and Delivered Percent. Three line items are listed, each with a checkbox for selection. The first item (ID 20277) is selected. Below the table, there are buttons for 'Attach an Exhibition Order' and 'New Exhibition Order'.

ID	Product	Description	Copy	Ad Type	Start Date	End Date	Total Estimated	Estimated to Date	Served to Date	Over/Under Delivery	Last Updated	3rd Party Discrepancy	Delivered Percent
20277	The Star Website 1 Size: Medium Rectangle (300 x 250) Section: FI	Banner Ad - Run of Site	CPM	2/22/2023	4/30/2023	116	16,764	8,815	-21,185	3/24/2023	N/A	64%	
31100017	The Star Newsletter - Published Dates Size: Medium Rectangle (300 x 250) Section: FI Response: B71	Rectangle - Home	FR	3/13/2023	3/20/2023	10,000	2	2	2		N/A	N/A	
31100018	The Star Website 1 Size: Medium Rectangle (300 x 250) Section: FI	Banner Ad - Run of Site	CPM	3/26/2023	4/30/2023	0	0	0	-30,000	Never	N/A	0%	
						10,116	16,766	8,815	-51,187		-8,815	15%	

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.

Standard Creative Types:

Digital Material Details

Creative Type

Image

HTML 5

3rd Party

Campaign Manager

Custom

Native Format

Custom Creative Template

Video Creative Types:

Digital Material Details

Creative Type

Video

Overlay

Redirect

Size Code

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:

CREATIVE TEMPLATES

Ad Server Setup

- Ad Server Integration
- Connection Setup
- Settings
- Cross Reference Tables
 - Advertisers
 - Agencies
 - Traffickers
 - Teams
 - Sales Reps
 - Placements
 - Ad Units
 - Creative Templates**
 - Native Templates
- Cross Targeting Tables
 - Audience Segments
 - Key/Value Targets
 - Labels

Ad Server Selection

- AD SERVER ID**
DFP3
- DESCRIPTION**
Newsycle DFP Server
- TYPE**
Google Ad Manager

Ad Server Data

ID	Description	Type	Already Imported
11742774	Image Interstitial	USER_DEFINED	☒
10000320	Pop-up or pop-under window with third-party content	SYSTEM_DEFINED	☒
10000440	Text ad	SYSTEM_DEFINED	☒

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:

NATIVE TEMPLATES

Ad Server Setup

- Ad Server Integration
 - Connection Setup
 - Settings
 - Cross Reference Tables
 - Advertisers
 - Agencies
 - Traffickers
 - Teams
 - Sales Reps
 - Placements
 - Ad Units
 - Custom Fields
 - Creative Templates
 - Native Templates**
 - Other Targeting Tables
 - Audience Segments
 - Key/Value Targets
 - Labels
 - Native Styles
 - Locations
 - Device Categories
 - Device Capabilities

Ad Server Selection

- AD SERVER ID**
GAMMSG
- DESCRIPTION**
GAM MSG Sandbox account
- TYPE**
Google Ad Manager

Ad Server Data

ID	Description	Type	Already Imported
12117318	Randy Native Format 2	USER_DEFINED	☒
12153440	Randy Format 1	USER_DEFINED	☒
10004400	Native app install ad	SYSTEM_DEFINED	☒
10004520	Native content ad	SYSTEM_DEFINED	☒
10006920	Native video app install ad	SYSTEM_DEFINED	☒
10007040	Native video content ad	SYSTEM_DEFINED	☒

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 select 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 desirable 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

Selected Ratecards									Bulk Update	
Ratecard ID	Description	Ratecard Type	Product ID	Product Name	Currency ID	Start Date	End Date	New End Date		
1	Open Rates	Group	NAV1	The Navigator Website		Wednesday, January 1, 2020	Wednesday, December 31, 2025	Thursday, December 31, 2026		
100	CLS Display Rates-NOK	Product	NAV10	The Navigator Daily News	NOK	Tuesday, January 1, 2019	Wednesday, December 31, 2025	Thursday, December 31, 2026		
101	Retail Open Rates-NOK	Product	NAV10	The Navigator Daily News	NOK	Tuesday, January 1, 2019	Wednesday, December 31, 2025	Thursday, December 31, 2026		
102	CLS Display Rates-NOK	Product	NAV13	The Navigator Times	NOK	Tuesday, January 1, 2019	Wednesday, December 31, 2025	Thursday, December 31, 2026		
103	Network rates-NOK	Group	NAV14	Naviga Network	NOK	Sunday, April 26, 2020	Wednesday, December 31, 2025			
104	Standard Rate Card - NOK	Product	NAV12	Navigator Magazine	NOK	Friday, January 1, 2021	Wednesday, December 31, 2025			
105	Retail Open Rates - GBP-GBP	Product	NAV13	The Navigator Times	GBP	Wednesday, December 9, 2020	Wednesday, December 31, 2025			
106	Retail Open Rates - EUR-EUR	Product	NAV13	The Navigator Times	EUR	Wednesday, December 9, 2020	Wednesday, December 31, 2025			
11	Standard E-Newsletter Rate	Group	NAV6	Navigator E-Newsletter		Sunday, March 1, 2020	Wednesday, December 31, 2025			
110	Inserts	Product	MAG2	Biking Magazine		Monday, February 1, 2021	Wednesday, December 31, 2025			
111	Inserts - GBP	Product	MAG2	Biking Magazine	GBP	Monday, February 1, 2021	Wednesday, December 31, 2025			

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.

How Line

View Change History

Create from Size Table

Copy lines from another ratecard

Apply Sort

Sort by Description

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Sort	ID	Size	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns	Inches or Centimeters or Approx. Lines	Production Link	External ID	Rate	Inactive	No Tax	
1	841	15.75x9.75 (Spread (Mag))	Full Color-CMYK	Spread (Mag)	No	840,000			Print Display, Modular	Print Display		0.00	0.000			19,425.00000	No	No	View Line Change History
2	842	2.375x9.75 (1/3 Page (V) (Mag))	Full Color-CMYK	1/3 Page (V) (Mag)	No	140,000			Print Display, Modular	Print Display		0.00	0.000			4,995.00000	No	No	View Line Change History
3	843	7.375x3.25 (1/3 Page (H) (Mag))	Full Color-CMYK	1/3 Page (H) (Mag)	No	140,000			Print Display, Modular	Print Display		0.00	0.000			4,995.00000	No	No	View Line Change History
4	844	7.375x4.875 (1/2 Page (H) (Mag))	Full Color-CMYK	1/2 Page (H) (Mag)	No	210,000			Print Display, Modular	Print Display		0.00	0.000			7,185.00000	No	No	View Line Change History
5	845	7.375x9.75 (Full Page (Mag))	Full Color-CMYK	Full Page (Mag)	No	420,000			Print Display, Modular	Print Display		0.00	0.000			12,240.00000	No	No	View Line Change History
6	846		Full Color-CMYK	Color Col Inch Ad	No			Run of Book	Print Display, Col x in	Print Display		0.00	0.000			125.00000	No	No	View Line Change History
7	847			8 1/2 Column Inch Ad	No			Run of Book	Print Display, Col x in	Print Display		0.00	0.000			100.00000	No	No	View Line Change History
8	848			Production Charge	No				Production Charges	Production Charges		0.00	0.000			0.00000	No	No	View Line Change History
9	849	7.375x9.75 (Full Page (Mag))	Full Color-CMYK	Full Page (Mag)	No	420,000			Print Cost Per Unit	Print Display		0.00	0.000			11,500.00000	No	No	View Line Change History

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Delete

Cancel

Save



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.

PRODUCT RATECARDS

VIEW RATECARD CHANGE HISTORY

Changed On	Changed By	Value Changed	Original Value	New Value
Wednesday, May 10, 2023 12:03 PM	Kelly Smith	Line 1240 Added		1240
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	Ratecard Desc.		Classified Advertising - Discounted
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	Start Date		01/01/2020
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	End Date		12/31/2025
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	Req. Table id		CLS
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	Req. Discounts Ind.		Y
Wednesday, December 15, 2021 9:40 AM	Kelly Smith	Packages Only Ind.		N

Ratecard Details:

- Product: The Navigator Times
- Selection Type: Only Active and Future Ratecards
- Ratecard ID: 154
- Ratecard Description: Classified Advertising - Discounted

Table Headers: Sort, ID, Color, Line Desc., Allow Description Override, Lines, Section, Position, Ad Type, G/L Type, Default Production Status, Columns, Inches or Centimeters or Approx. Lines, Production Link, External ID, Base Qty, Base Rate, Coverage Rate, Inactive, No. of Lines, Change

Table Data:

Sort	ID	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns	Inches or Centimeters or Approx. Lines	Production Link	External ID	Base Qty	Base Rate	Coverage Rate	Inactive	No. of Lines	Change
1	1240		Classified - Column Appear Line	No	Classified			Cost Per Column Appear	Print Classified	Complete	0.00	0.000			5.00	50.00000	0.50000	No	No	View Line Change History
2	1122		Classified Display	No	3,000	Classified		CLS Column-Inch	Print Classified	Complete	0.00	0.000			3.00	100.00000	25.00000	No	No	View Line Change History

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.

SENSITIVITY CODES

Sensitivity Codes		
ID	Description	
MARYJANI	Marijuana Related	✖
CRAZY	Political	✖
WEA	Weapons, including Firearms, Knives, etc	✖
BOOZE	Alcohol	✖
ID	Enter a Description	+

Reset Save

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.

This is a screenshot of a client setup form. The form contains several fields with checkboxes and dropdown menus. The 'Sensitivity Code(s)' field is highlighted with a purple border and contains the value 'Alcohol'.

Is this an Agency	☐ No
Use Multiple Brands	☒ Yes
Pay Sales Rep Commissions on Paid Invoices Only	☐ No
Client Type	National Account
Pre-Payment Required	Prepayment NOT Required
→ Auto Apply Cash on Account when Campaign is Confirmed	☐ No
Default Invoice Form Detail Level	Show Each Line - Including Costs
Sensitivity Code(s)	Alcohol

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.

This is a screenshot of a campaign setup form. The form is divided into several sections. The 'Sensitivity Code(s)' field is highlighted with a purple border and contains the value 'Alcohol'.

Billing Contact		Default Contract	
Billing Address	2701 Le Jeune Road CORAL GABLES, FL 33134 Tel: 305 573-8511	Payment Terms (Default)	Net 60
Product Group	Navigate Product Group	Status	Q1 - Proposal
Order Contact		Marketing Campaign	
Production Controller	Polly Producer	Call List	
Campaign Manager		Industry Code	Food Manufacturing
		Sensitivity Code(s)	Alcohol
		P.O. Number	
		Customer Ref. No.	
		External Campaign ID	
		Invoice/Form Detail Level	Show Each Line - Including Costs
		Marketing Content Template	
		Signature Template	Responsive Performance Campaign
		Ready to Sign	☐ No

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

MATERIAL ADD/UPDATE

Material Header

Material ID

2218

RefreshSearchNew

Material Type

Material for Print Delivery

Material Desc.

Advertiser ID

100068

Advertiser Name

Bacardi USA Inc

Date Received

Wednesday, April 19, 2023

Expires On

Proof Date

External ID

Pickup from ID
(or Copied from ID)

Sensitivity Code(s)

Alcohol

Enter File URL

Refresh Preview Image

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.

ACCOUNT: GENERAL SETUP

Account Maintenance

Name and Address Setup

Employees / Contacts

Addresses

External Contacts

External System IDs

Account Overview

A/R Setup

Advertising Setup

Job Costing Setup

Newsstand Setup

Exhibition Setup

Attachments

Cards on File

Account Alerts

History of Changes

General Setup

Account ID

Account Name

Account Type

Account Created On

Account Created By

Salesforce ID

Account Details

Parent Account

Website

ID	Name	Client Type	City	State/Region	Postal Code	Country
244386	The Coca Cola Company	NAT	THOMSON	GA	30824	US
209052	THE COCA COLA CO		ATLANTA	GA	30301	US
255093	Santa Fe Brewing Company	LOC	SANTA FE	NM	8750-8449	US
255128	Underwater World		Horsham	PA	19044	US
201371	Starbucks	NAT	Seattle	WA	98134	US
230002	BBDO Worldwide Incorporated		NEW YORK	NY	10019-6028	US
229409	BIG TIME LAW FIRM		STAMFORD	CT	06901	US
256368	Alaska Fishing	NAT	ANCHORAGE	AK	99501	US
245074	Publicis Groupe		SAN FRANCISCO	CA	94133	US
241222	Tyson Foods	NAT	PHOENIX	AZ	85021	US
255471	Coptic Church	AUC	MINNEAPOLIS	MN	55442	US
COMR	Communication & Marketing Creative Services		HUNT VALLEY	MD	21030	US
241434	American Airlines		FORT WORTH	TX	76107	US

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

CATEGORY ASSIGNMENT

Product ID: The Star Daily Newspaper

Category Tree ID	Category Tree Name	Layout	Day of Week Restriction(s)
1	Help Wanted	6 Column	Leave Blank for No Restrictions
MERCH	Merchandise	6 Column	Leave Blank for No Restrictions
OBITS	Obituaries/Funerals	6 Column	
REAL	Real Estate	6 Column	
PETS	Pets and Livestock	6 Column	
EMPLPOY	Employment	6 Column	
LEGALAD	Legals	6 Column	
MANY	Many Things	6 Column	
AUTO	Automotive	6 Column	
GEN	General Classified	Select a Layout	

Day of Week Restriction(s) dropdown options:

- Tuesday, Sunday
- ☐ Monday
- ☒ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☒ Sunday

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.

Additional Line(s)

MULTI-DATE SELECTION

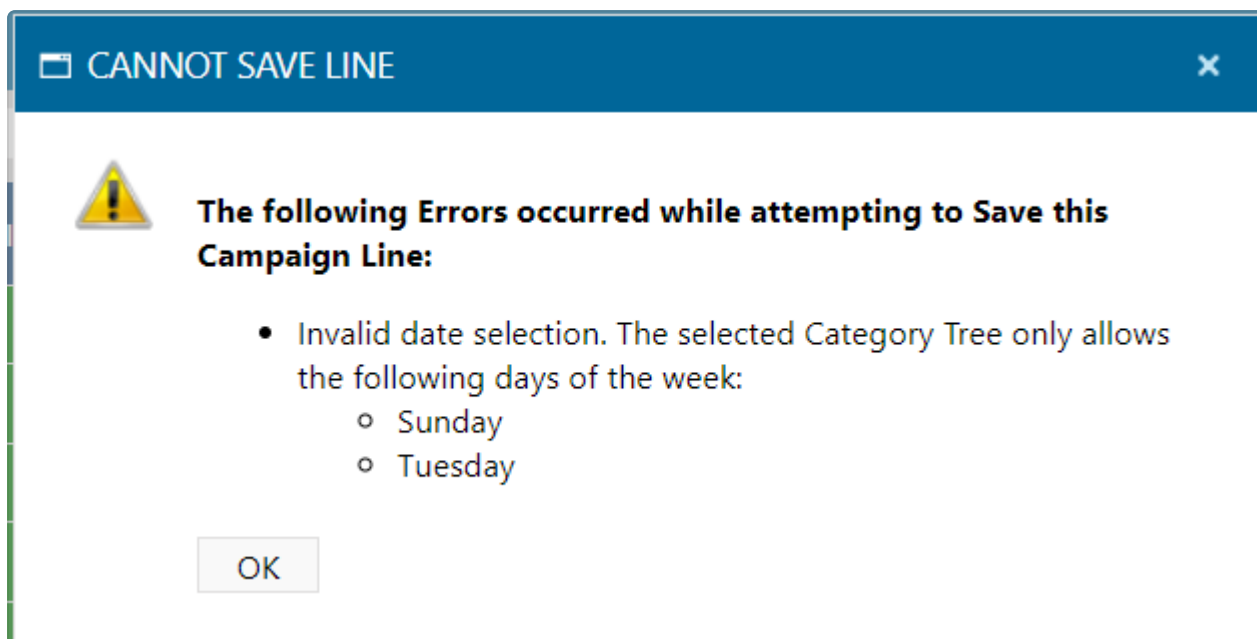
Start Date: 4/1/2023 End Date: 4/30/2023 Max Days: Select

April 2023

S	M	T	W	T	F	S
13						1
14	2	3	4	5	6	7
15	9	10	11	12	13	14
16	16	17	18	19	20	21
17	23	24	25	26	27	28
18	30					

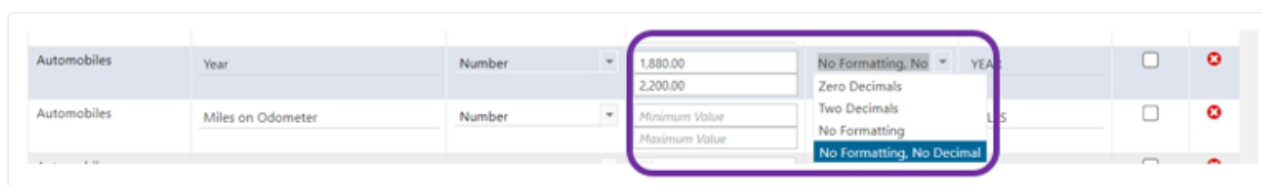
Cancel Apply Selection

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:

EDIT CATEGORY								
Category Setup	Online Options	Classified Stylesheet	Category MetaData					
Level	Label/Question	Prompt Type	Validation	Formatting	Merge Tag	Required		
Services Directory	Number - no format, no decimal	Number	1,900.00 2,100.00	No Formatting, No		☐		✖
Services Directory	Number - zero decimals	Number	0.00 99.00	Zero Decimals		☐		✖
Services Directory	Number - 2 decimals	Number	Minimum Value Maximum Value	Two Decimals		☐		✖
Services Directory	Number - no formatting	Number	Minimum Value Maximum Value	No Formatting		☐		✖
						☐		✖

The above would display as follows in order entry:

Number - no format, no decimal	2023
Number - zero decimals	97
Number - 2 decimals	1,234,567.00
Number - no formatting	1234567.00

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

i 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:

Number - no format, no decimal	2023
Number - zero decimals	97
Number - 2 decimals	1 234 567,00
Number - no formatting	1234567,00

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.

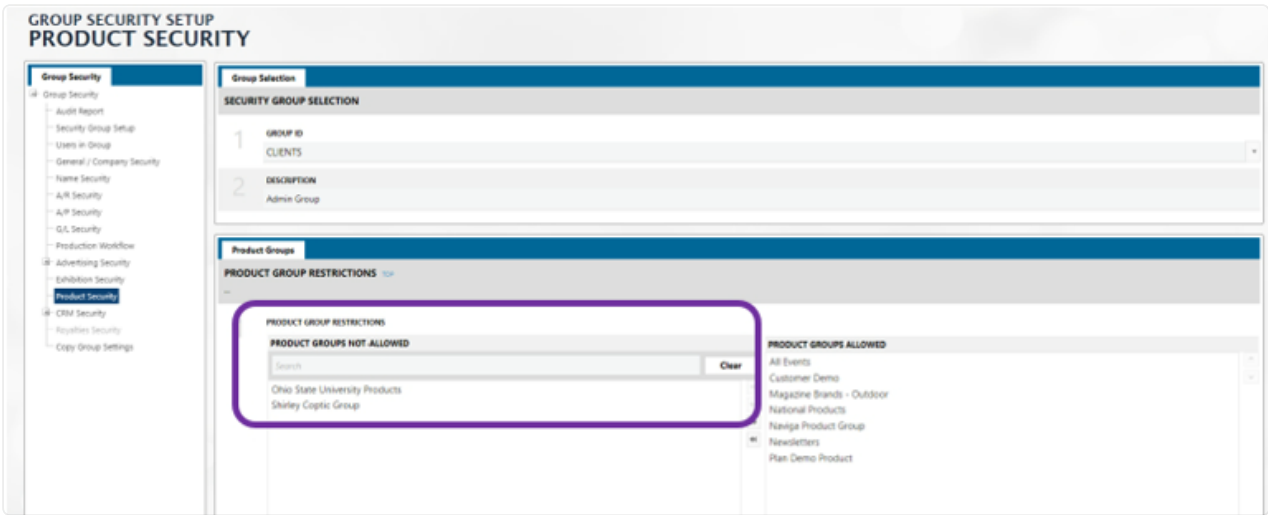
With the above set to yes, the user will see this in Full Line Entry (Note Google Ad Manager and Expected Sizes NOT available at the top):

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:

Main Menu

CRM Manager

Home

Leads

Customers

Opportunities

Rep. Summary

Advertising

Exhibitions

Setup

10

11

12

13

14

Logout

Rep Activity

Marketing Analysis

Pipeline

Proposal Analysis

Group Sales

Digital Delivery

PinPoint

Advertiser Ranking

Budgets / Quotas

My CRM

CAMPAIGN DELIVERY

Rep: My Group Month/Year: March 2023 Percent Complete: 76%

View Timeframe: This Month

Campaign Lines

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

1

Page: 1 of 1 Row size: 9 Change

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Campaign ID	Advertiser	Brand	Agency	Rep ID	Line ID	Product	Ad Type	Description	Line Type	Start Date	End Date	Delivered Percent	Estimated to Date	Served to Date	Over/Under Delivery	Last Updated	3rd Party Discrepancy
1526	BH&I of North America, LLC	5 Series	J. Walter Thompson	KELLY	4848	The Navigator Website	Open CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	3/31/2023	100%	4,327	2,866	-1,461	3/23/2023	N/A
1556	BH&I of North America, LLC	Local Dealership	CHLOE	4933	The Navigator Website	Open CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	4/6/2023		11%	16,347	9,735	-6,612	3/23/2023	N/A
1588	Indian Valley Scuba	Indian Valley Scuba	KELLY	5034	The Navigator Website	Open CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	3/31/2023	100%	9,470	6,046	-3,424	3/23/2023	N/A	
1530	Starbucks	Starbucks	KELLY WAYNE	4856	The Navigator Website	Open CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	3/31/2023	100%	3,628	2,770	-858	3/23/2023	N/A	
1530	Starbucks	Starbucks	KELLY WAYNE	4862	Gardening Mag Website	Targeted CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	3/31/2023	100%	12,994	8,538	-4,456	3/23/2023	N/A	
1587	BH&I of North America, LLC	3-Series	Ogilvy & Mather	DONNA	5069	The Navigator Website	Open CPM Rate	CPM: GAH Cost Type: CPM: GAH Line Type:STANDARD		3/1/2023	3/31/2023	100%	4,231	2,721	-1,510	3/23/2023	N/A

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.

CAMPAIGN DELIVERY
Rep: My Group Month/Year: March 2023 Percent Complete: 76%

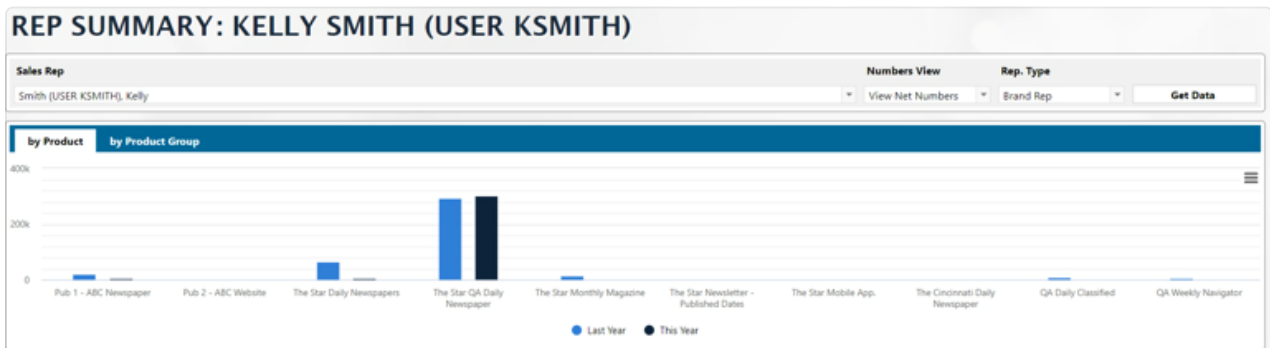
Time Frame
View TimeFrame: This Month Select Data

Campaign Lines Configure Output

ON SCREEN COLUMNS		EXCEL EXPORT COLUMNS	
Reset Configuration	Save Configuration	Reset Configuration	Save Configuration
Available Grid Columns	Selected Grid Columns	Available Export Columns	Selected Export Columns
Rep Name(s)	Campaign ID	Rep Name(s)	Campaign ID
Rep ID(s)	Line ID	Rep ID(s)	Advertiser
Ad Type ID	Advertiser	Ad Type ID	Brand
Brand	Product		Agency
3rd Party Discrepancy	Ad Type		Line ID
Agency	Description		Product
	Line Type		Ad Type
	Start Date		Description
	End Date		Line Type
	Delivered Percent		Start Date
	Estimated to Date		End Date
	Served to Date		Delivered Percent
	Over/Under Delivery		Estimated to Date
	Last Updated		Served to Date
			Over/Under Delivery
			Last Updated
			3rd Party Discrepancy

✓ 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

Status No.

Status Description

Checks

8

Sent To Progress

0

16

Need Approval

0

17

Material Review Requested

0

Refresh Screen w/ Filters

Selected Campaign Lines

Configure Output

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

Select an Action

Go

Preview of Final	Material	Line No.	Campaign	Advertiser	Campaign Description	Columns	Width in inches	Height in inches	Issue Date	Due Date	Line Desc.	Line Type	Page No.	Campaign Status	Position	Artwork Status	Approval Status	Product/Status Description	Campaign P.O. Number	Line PO Number	Has Campaign Attachments
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	10919	29954.1	11531	Underwater World Horsham	New Material Management Testing	6,360	12,625	6,175	1/6/2023	1/5/2023	1/2 Page	FF	0,500	IS	Run of Section, Sports			New On Hand	Camp PO 343	LPD 55777	
	10920	29954.2	11531	Underwater World Horsham	New Material Management Testing	6,360	12,625	6,175	1/10/2023	1/12/2023	1/2 Page	FF	0,500	IS	Run of Section, Sports			New On Hand	Camp PO 343	LPD 55777	
	10921	29954.3	11531	Underwater World Horsham	New Material Management Testing	6,360	12,625	6,175	1/16/2023	1/16/2023	1/2 Page	FF	0,500	IS	Run of Section, Sports			New Material Create	Camp PO 343	LPD 55777	
	10917	29954.6	11531	Underwater World Horsham	New Material Management Testing	6,360	12,625	6,175	1/17/2023	1/16/2023	1/2 Page	FF	0,500	IS	Run of Section, Sports			New On Hand	Camp PO 343	LPD 55777	

Attachments are found here on the Campaign → Attachment node:

CAMPAIGN ATTACHMENTS

Campaign Explorer

- Campaign
- Campaign Setup
- Line Items
- Material Management
- Campaign Budget
- Campaign Custom Data Forms
- Digital Serving Analysis
- Co-op Billing
- User Defined Fields
- Notes / Comments
- Revenue Allocation
- Production Contacts
- Teasheet Contacts
- Generate Proposal / Confirmation
- Attachments**

Campaign Attachments

Campaign ID 11531
 Start Date 1/1/2023

Advertiser Underwater World Horsham
 End Date 3/31/2023

Brand Underwater World
 Net Amount 50,700.50

Agency
Status Invoicing Started

Attachments

Attachment	User	Date	Time	Delete
Some Random Attachment	Kelly Smith (USER KSMITH)	3/24/2023	5:35 AM	

Links

Campaign PO number comes from the Campaign header:

Campaign

Campaign Setup

Line Items

Material Management

Campaign Budget

Campaign Custom Data Forms

Digital Serving Analysis

Co-op Billing

User Defined Fields

Notes / Comments

Revenue Allocation

Production Contacts

Tearsheet Contacts

Generate Proposal / Confirmation

Attachments

Invoices & Payments

Rep Commissions

History of Changes

Go to CRM View

Go to Advertiser View

Advertiser ID

Advertiser Name

Advertiser Address

Client Type

Brand

Agency / Bill-to

Billing Contact

Billing Address

Product Group

Order Contact

Production Controller

Campaign Manager

Gross Amount

Commission Amount

Net Amount

Estimated Tax

Estimated Total

Currency

Default Discount %

Auto Payment Method

Default Contract

Payment Terms

Status

Project

Industry Code

Clash Code(s)

P.O. Number

Customer Ref. No.

235078

Underwater World Horsham

495 Easton Rd
HORSHAM, PA 19044
Tel: (215) 672-4180

Local (I)

Underwater World

(255078) Underwater World Horsham

View Credit Status

495 Easton Rd
HORSHAM, PA 19044
Tel: (215) 672-4180

ABC - Kelly's Co.

Kelly Smith (USER KSMITH)

50,700.50

0.00

50,700.50

0.00

50,700.50

Use System Default

0.00

Manage Cards on File

Net 30 Days

Invoicing Started

Retail

Camp PO 345

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

EDITING FLAT FEE LINE: 29954

Line Details

Creatives / Materials

Production Notes

Other Options

User Defined Fields

Category Me

Other Settings

Custom Data Form

External Project URL

Marketing Content Template

Line Item P.O. Number

Override Tax

Replace Price on Invoice

Split Run

Production Link

Space Holder Campaign ID

Number of Tearsheets to

Placement Options

Page Priority

Quadrant

Page Position

Requested Page Number

Position is Guaranteed

Internal Comment

Go to External Project

LPO 55777

No

No

KS_Print_Specs (PRI)

1.00

Any Pa

Anywh

Don't t

No

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.

Selected Campaign Lines

Configure Output

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

Select an Action

Go

Preview of Final	Material	Line No.	Campaign	Advertiser	Campaign Description	Columns	Width in Inches	Height in Inches	Issue Date	Due Date	Line Desc.	Int. Note	Line Type ID	Page Eq.	Campaign Status ID	Position	Artwork Status
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	10919	29954.1	11531	Underwater World Hornham	New Material Management Testing	6.000	12.625	8.175	1/6/2023	1/5/2023	1/2 Page	Yes, Hover to view	FF	0.500	IS	Run of Section, Sports	
	10920	29954.2	11531	Underwater World Hornham	New Material Management Testing	6.000	12.625	8.175	1/13/2023	1/12/2023	1/2 Page	Yes, Hover to view	FF	0.500	IS	Run of Section, Sports	

This is an external Note on the Line Item. Please make note of this

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.

Main Menu

Ad Home

Customers

Campaigns

Production

Billing

Analysis

Setup

Logout

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

Post/Post

Advertiser Ranking

Commissions

Line No.	Product	Advertiser ID	Advertiser	Campaign	Campaign Description	Start	End	Due Date	Line Desc.	Flight Status	Campaign Status ID	Section	Position	Ad Type	Material	Approved Status	Controller	Production Notes	Int. Note	Primary Contact	Cal. Attr.	Design Status	Ad Server Order	Ad Server Link	Master Status Description
4716	The Navigator Website	100140	Underwater World	1001	Support and hosting services combo	5/1/2023	6/30/2023	4/26/2023	Open CPM Rate	CD			Right Rail	Cost Per Thousand	1010, 1011, 1012		Jolly Producer			Ed Gucken			Order	Link	Waiting for Materials
4715.1	The Navigator Daily News	100105	Nationwide Insurance	1003	Spring Campaign	4/12/2023	4/12/2023	4/10/2023	Full Page B&W	IS				Print Display: Module	1010		Jolly Producer								Waiting for Materials
4715.2	The Navigator Daily News	100105	Nationwide Insurance	1003	Spring Campaign	4/06/2023	4/06/2023	4/04/2023	Full Page B&W	IS				Print Display: Module	1010		Jolly Producer								Waiting for Materials
4715.3	The Navigator	100105	Nationwide Insurance	1003	Spring Campaign	5/16/2023	5/16/2023	5/16/2023	Full Page B&W	IS				Print Display: Module	1010		Jolly Producer								Waiting for Materials

Order

Link

Waiting for Materials

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 GROUP

Product Group

Navigation Product Group (NAWGA)

Start Date

4/27/2023

End Date

Include Classified Ads

No

Break by Month

Break by Month

Include Quotes

No

Refresh

Report Template

Apply

Edit

New

Link

Filters

Starting on or After

Ending on or Before

Filter by Master Status

Filter by Sections

Filter by Ad Types

Filter by Controllers

Refresh Screen w/ Filters

Summary by Master Status

Status No.	Status Description	Orders
1	Waiting for Materials	166
2	Work in Progress	11
3	Out to Proof	0
4	Completed	490

Production by Controller report

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

Selected Campaign Lines

Configure Output

Select an Action

Go

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

Line No.	Campaign	Product	Advertiser	Issue Date	Due Date	Line Desc.	Line Type ID	Production Status Description	Master Status Description	Order Status Description	Approval Status	Section	Position	Ad Type	Material	Production Notes Yes/No	Int. Note	Primary Contact	Has Campaign Attachments
2927	960	Instagram	Audi UK	9/1/2021	8/30/2021	Manage Instagram Posts	FF	Set Goal	Waiting for Materials	Invoicing Started					Digital Flat Fee (non-google)			Jennifer Jones	
2929	960	Facebook	Audi UK	9/1/2021	8/30/2021	Manage Facebook Presence	FF	Set Goal	Waiting for Materials	Invoicing Started					Digital Flat Fee (non-google)			Jennifer Jones	
4716	1501	The Navigator Website	Underwater World	5/1/2023	4/25/2023	Open CPM Rate	CPM	New Material to Come	Waiting for Materials	Confirmed		Right Rail	Cost Per Thousand	1915, 1915, 1920				Ed Ouckin	
4718.1	1506	The Navigator Times	Underwater World	4/1/2023	4/9/2023	1/4 Page 4C	FF	New Material to Come	Waiting for Materials	Invoicing Started		A- News Section	Run of Section	Print Display, Modular				Ed Ouckin	



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.

Product	Line ID	Campaign	Type	Description	Section Name	Position Name	Sizes	Status ID	Line Type	Est. Gross Amount	Est. Net Amount	Actual Gross Amount	Actual Net Amount	Currency	Viewable Qty Saved	Actual Qty
The Star Website 1	20278	8594	Performance	Entertainment CPM	Run Of Site		Medium Rectangle	CO	CPM	260.87	260.87	0.00	0.00	USD	0	0
The Star Website 1	20278	8594	Performance	Entertainment CPM	Run Of Site		Medium Rectangle	CO	CPM	269.57	269.57	269.57	269.57	USD	0	33,696
The Star Website 1	20277	8593	Performance	Banner Ad - Run of 5 ite	Finance		Medium Rectangle	CO	CPM	112.50	112.50	0.00	0.00	USD	0	0
The Star Website 1	20277	8593	Performance	Banner Ad - Run of 5 ite	Finance		Medium Rectangle	CO	CPM	116.25	116.25	116.25	116.25	USD	0	13,676



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.

FLEXIBLE CAMPAIGNS WITH BILLING ISSUES

Campaign Billing

- Prepare Performance Billing
- Prepare Flexible Billing
- Generate Invoices
- Print Invoices
- Regenerate Invoices
- Reverse Campaign Invoicing
- Campaigns with Problems
 - Billing Schedule Issues**
 - Credit Issues
 - Missing Actuals
 - Credit Card Issues
 - Campaigns Awaiting Credits

Campaigns

Refresh

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

Campaign ID	Group	Advertiser	Agency	Report	Start Date	End Date	Status	Currency	Net Amount	Installment	Schedule Amount	Billed Amount	Difference Amount
1304	India	BNI of North America LLC		Close Order	5/1/2023	6/30/2023	CO		48,740.00	0	0.00	0.00	48,740.00
									48,740.00	0	0.00	0.00	48,740.00

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.

Supporting Document	File or Document	3,000
		MAX SIZE IN KB
		.doc, docx, xls,xlsx
		ALLOWED FILE TYPES

- 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.

Supporting Document



screenshots.docx

[Download](#) [Select](#) [Remove](#)

 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.

PRODUCT DETAIL

Product Setup

PRODUCT GROUP SETUP

PRODUCT SETUP

Product Listing

Product Details

Material Handling

Audience

Demographics

G/L Overrides

GL Overrides Import

Tax Overrides

PRICING RULES

Ratecards

Price Adjustments

Auto Adjustments

SECTIONS & POSITIONS

Sections

Sections Import

Positions

Inventory by Position

Positions Import

Copy Sections/Positions

ISSUE-BASED SETUP

Product Settings

G/L Defaults

Campaign Parameters

Order UDFs

Product ID

NAV13

Product Name

The Navigator Times

Format

Newspaper

Inactive

No

General Settings

Product Type

Print Product (eg. Magazine, Newspaper)

Default Custom Data Form

Ad Serving Platform

Invoice Line Group

Print Lines

Hide Zero Value Lines

No

When set to YES, lines with a zero value will not display on invoices nor confirmations

Affidavit Template Form

Sample Affidavit

Product URL

Company

naviga

Primary Group

Naviga Product Group

Holiday Calendar(s)

US Publishing Holidays

Default Artist Assignment

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.

TICKETS DASHBOARD

Ticket Type

Assigned to User

Assigned to Team

Owner User

Owner Team

Entered By

Priority

Master Status

Include Closed

Closed from

Closed to

Select Data

New Ticket Request

Pending

Under Review

More Information Required

1

6

1

1

Selected Tickets

Configure Output

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

Ticket ID

Campaign ID

Advertiser Name

Agency Name

Type

Short Description

Status

Master Status

Priority

Assigned To

Assigned to Team Name

Owner User Name

Owner Team Name

Created by User

Created Date/Time

Last Updated by

Last Updated

Custom Data Form Name

Custom Data Form is Mandatory Request Data

4

1089

Chapa Chapa

Qualification / Credit Request

Pending

Pending

Normal Priority

Managers

Kelly Smith

Managers

Kelly Smith

Monday, May 16, 2022 8:57:07 AM

Kelly Smith

Monday, May 16, 2022 8:57:07 AM

9

1346

State of North America, LLC

Credit Increase

Pending

Pending

Normal Priority

Sam Moneybags

Accounting/Finance

Kelly Smith

Managers

Kelly Smith

Thursday, December 8, 2022 2:11:25 PM

Kelly Smith

Thursday, December 8, 2022 2:11:25 PM

Financial Ticket

1

1313

Indian Valley Scuba

Credit Please

Review in Progress

Under Review

Normal Priority

Sam Moneybags

Accounting/Finance

Kelly Smith

Managers

Kelly Smith

Wednesday, February 9, 2022 10:18:13 AM

Kelly Smith

Thursday, December 8, 2022 2:15:23 PM

Financial Ticket

8

1301

Underwater World

Please help with this

Pending

Pending

Normal Priority

Sam Moneybags

Accounting/Finance

Kelly Smith

Managers

Kelly Smith

Thursday, September 26, 2022 8:49:23 AM

Kelly Smith

Thursday, September 26, 2022 8:49:23 AM

10

1384

State of North America, LLC

Ogley & Mather

Manager Assigned

Please ignore this

Pending

Pending

Normal Priority

Managers

Kelly Smith

Managers

Kelly Smith

Thursday, April 27, 2023 2:44:19 PM

Kelly Smith

Thursday, April 27, 2023 2:44:19 PM

8

1340

State of North America, LLC

Please change start date

Initial Request for Modification Received

New Ticket Request

Normal Priority

Production

Kelly Smith

Managers

Kelly Smith

Thursday, December 8, 2022 11:31:06 AM

Kelly Smith

Thursday, December 8, 2022 11:31:06 AM

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.

The screenshot shows the 'MY PROFILE' interface. At the top, there's a header with 'MY PROFILE' and window controls. Below this, user information is displayed: User ID (KSMITH), User Name (Kelly Smith), User E-Mail Address (kelly.smith@newsycle.com), and User Security Group (CLIENTS). To the right is a profile picture section with a cartoon fish icon, a 'Select New' button, and a 'Remove Profile Picture' button. Below the user info is a tabbed interface with 'Basic Settings', 'Production', 'Email Integration', and 'Rep Security'. The 'Email Integration' tab is active, showing 'User Name / Email Address' (ncsdemo@Dint.oremicrosoft.com), 'Connection Authorized' (Yes), 'Enable Email Sync' (Yes), 'Email Folder(s)' (a dropdown menu), 'Enable Calendar Sync' (Yes), 'Calendar Name' (a text field), 'Sync Days Before Today' (30), and 'Sync Days After Today' (60). A purple arrow points to the 'Account Link Status' dropdown menu, which is currently set to 'running'. At the bottom are 'Close' and 'Save' buttons.

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 <code><ACCESS_TOKEN></code> 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 <code><ACCESS_TOKEN></code> 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:

ID	Lead Status	Created Date/Time	Source	Marketing Campaign	Marketing Effort	Product Group
33	Marketing Qualified	Wednesday, October 12, 2022 2:07 PM	Competitors Show	Mailing Promo For Brand Development	1	
153	In Progress	Friday, March 31, 2023 2:32 PM	Annual Trade Show	2021+ Call List	2	DEMO

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

ID	Lead Status	Contact ID	Contact Name	Created Date/Time	Source	Marketing Campaign	Marketing Effort	Product Group
33	Marketing Qualified	262936	Maria F. Cortez	Wednesday, October 12, 2022 2:07 PM	Competitors Show	Mailing Promo For Brand Development	1	
153	In Progress	262936	Maria F. Cortez	Friday, March 31, 2023 2:32 PM	Annual Trade Show	2021+ Call List	2	DEMO
154	New	254871	Person 2 Contact	Friday, March 31, 2023 2:37 PM	Telemarketing	Mailing Promo For Brand Development	1	ABC

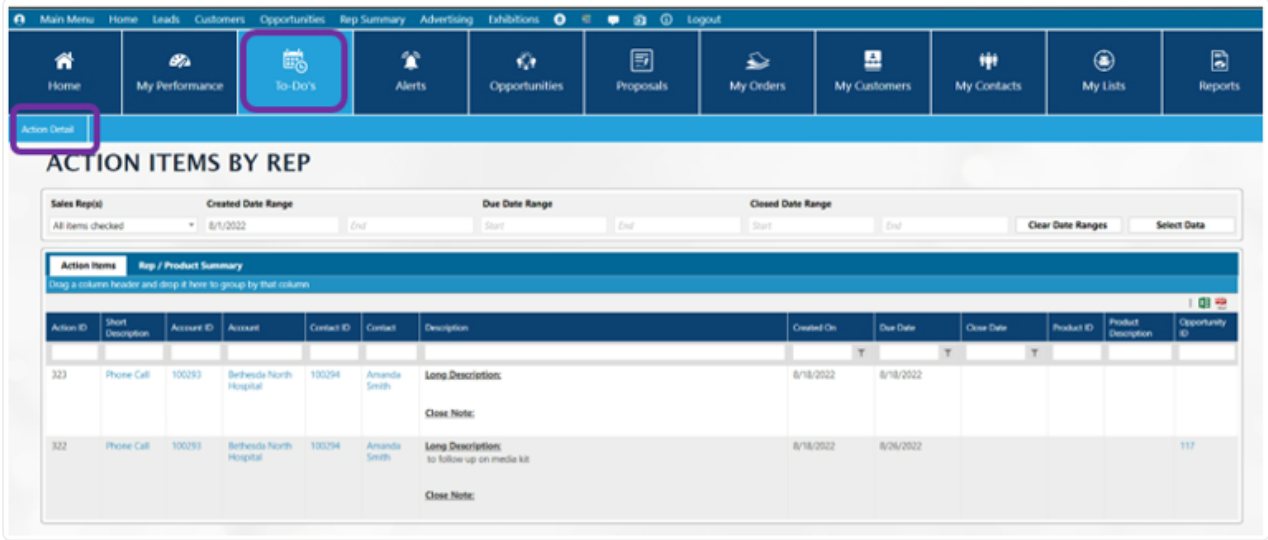
Opportunity Quick Update - Rep Group

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

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

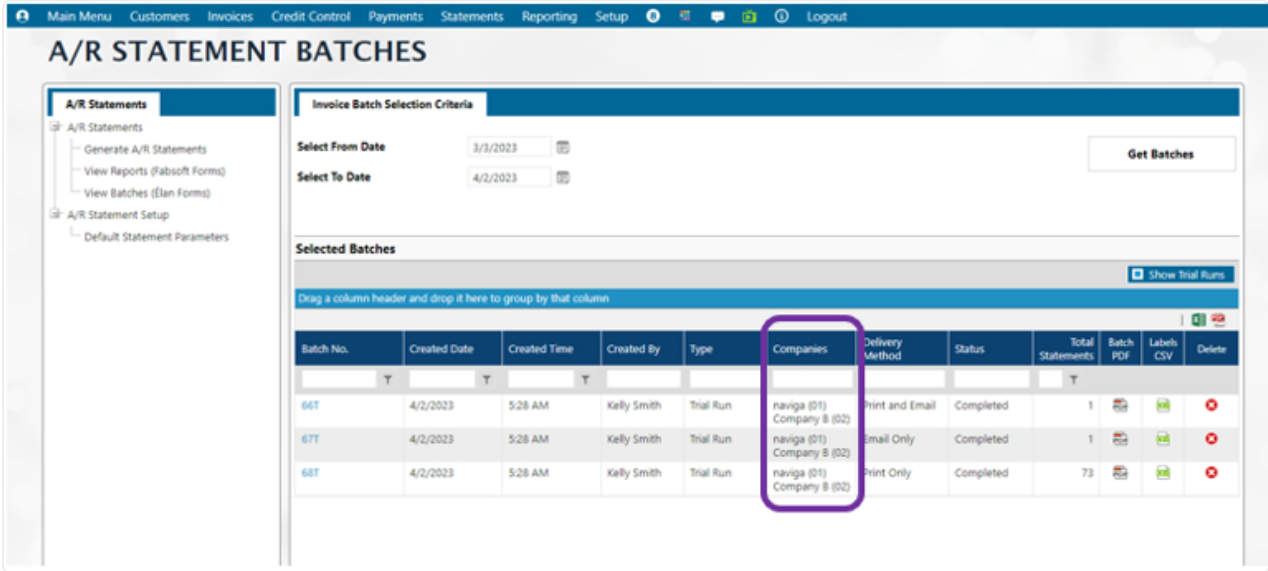
As a regular rep, you can also see this report by first clicking on the "To Do" navigation box in the CRM Module and then clicking the sub-navigation box called "Action Detail." This report is aware of your permissions and will only show you action items for yourself and any other reps you are permitted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



Accounts Receivable Module

Company Column in Statement Batch List

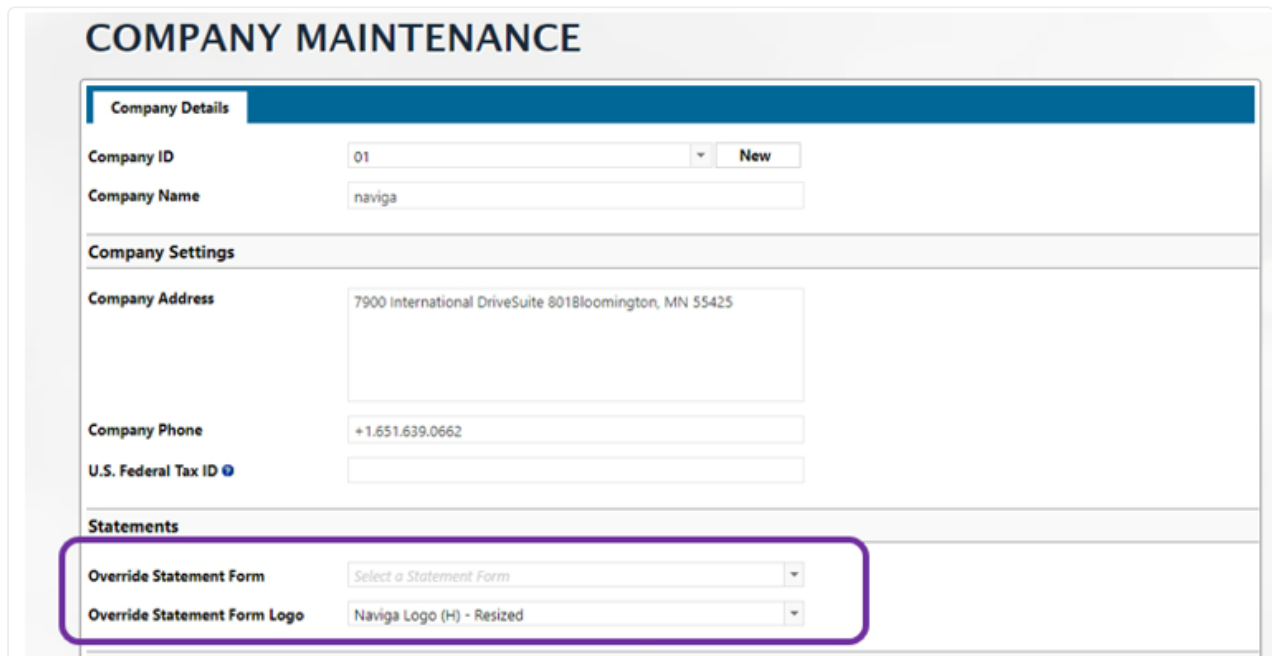
When viewing the list of batches in A/R Statements, there is now a column displaying the Company(s) which were included in that batch.



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



The screenshot displays the 'COMPANY MAINTENANCE' interface. It features a 'Company Details' section with fields for 'Company ID' (01) and 'Company Name' (naviga). Below this is the 'Company Settings' section with fields for 'Company Address' (7900 International Drive Suite 801 Bloomington, MN 55425), 'Company Phone' (+1.651.639.0662), and 'U.S. Federal Tax ID'. The 'Statements' section is highlighted with a purple box and contains two dropdown menus: 'Override Statement Form' (Set to 'Select a Statement Form') and 'Override Statement Form Logo' (Set to 'Naviga Logo (H) - Resized').

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.

100050	AMC Theatres	24,625	0	0	0	0
100059	BMW UK	104,480	0	0	6,000	12,000
100044	Ogilvy & Mather	372,702	454	0	38,438	31,851
100045	Tyson Foods			0	0	0
100046	Universal Studios			0	150	120
100047	Bank Of Boston			0	0	494
100041	Marriott International, Inc			0	4,703	1,527
100249	St. Mary Medical Center			0	9,000	7,200
100167	Stove and Tap			0	1,298	1,195
100162	Lansdale Courthouse			0	2,195	1,756
100163	Speedy Printing Co			0	0	0
100160	McCorkle Funeral Home			0	4,986	3,989
100168	Hoover USA			0	34,000	27,200
100009	Bayer Diagnostics, Inc			0	0	28,000
100008	Glaxo Smith Kline			0	0	0
100005	Starbucks			0	0	8,506
100006	Kraft Foods			0	0	0
100306	Spar			0	0	0
100308	Coptic Diocese US			0	0	0
100222	CVS			0	12,575	12,575
				0	189,522	279,664

GENERATE LETTERS

Default Collection Letter Form

Your Statement

Collection Letter Form 0-30

Collections Letter 1 - Invoices Attached

Collection Letter Form 31-60

Collections Letter 1 - Invoices Attached

Collection Letter Form 61-90

Collections Letter 2 - Credit Stop

Collection Letter Form 91-120

Collections Letter 3 - Final Notice

Collection Letter Form 121+

Collections Letter 3 - Final Notice

Use Language Override Forms Where Available / Applicable

☒ Yes

New Status

Next Contact Date

Send Emails

☒ Yes

Include Invoices

☒ Yes

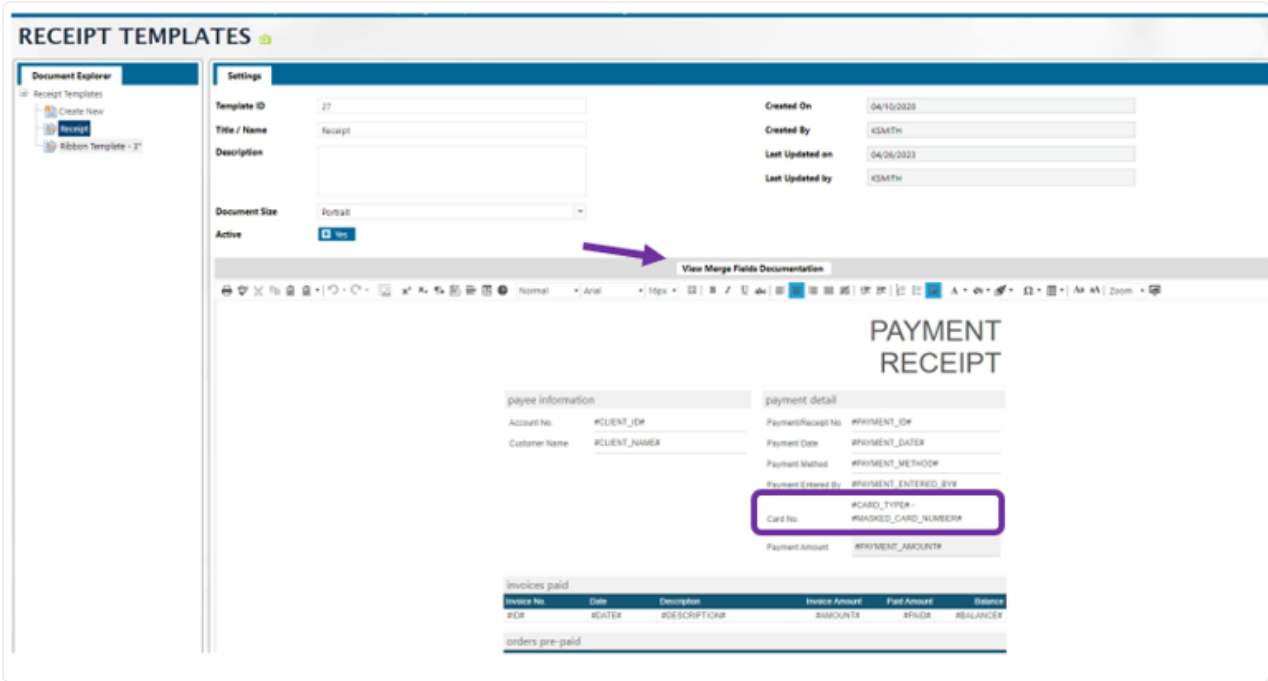
Cancel

Generate Letters

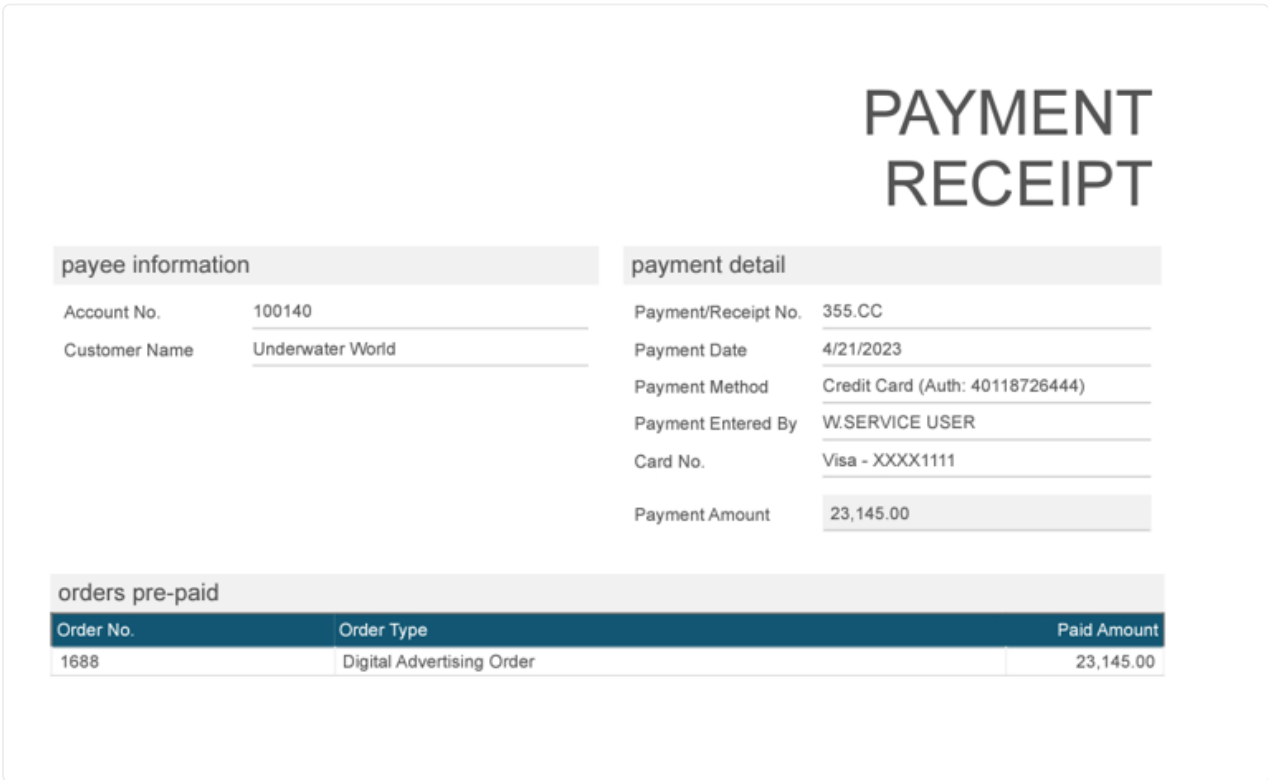
This is set to "yes" by default, but can be unchecked if you do not wish to include the open invoices as attachments.

"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:

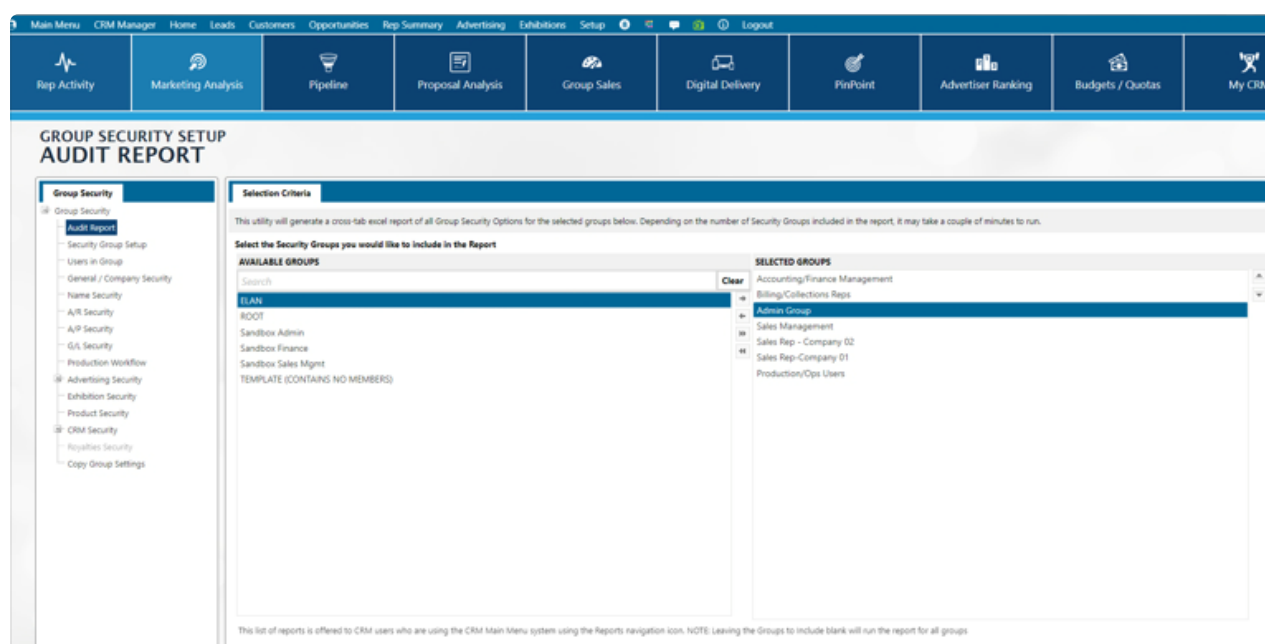


General / Admin Module

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.

	A	B	C	D	E	F	G	H	I	J
1	Module Access	ACCTMGR	ACCTUSR	CLIENTS	SALESMGR	SALESUSR02	SALESUSR	PRODUCTION		
2	Accounts Payable	Yes	No	Yes	No	No	No	No		
3	Accounts Receivable	Yes	Yes	Yes	No	No	No	No		
4	Administration	No	No	Yes	No	No	No	No		
5	Advertising	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
6	Credit & Collections	Yes	Yes	Yes	No	No	No	No		
7	Customer Relationship Management (CRM)	No	Yes	Yes	Yes	Yes	Yes	Yes		
8	Exhibition	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
9	General Ledger	Yes	No	Yes	No	No	No	No		
10	Informant	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
11	Newsstand	No	No	No	No	No	No	No		
12	Production	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
13	System Initialization	No	No	Yes	No	No	No	No		
14										
15										
16										
17										

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.

TAXA NUMBER

Other Settings

Tax Code

Currency
Leave blank for Local Currency

E.E.C. Member
☐ No

E.E.C. Country Code

Preferred Forms Language

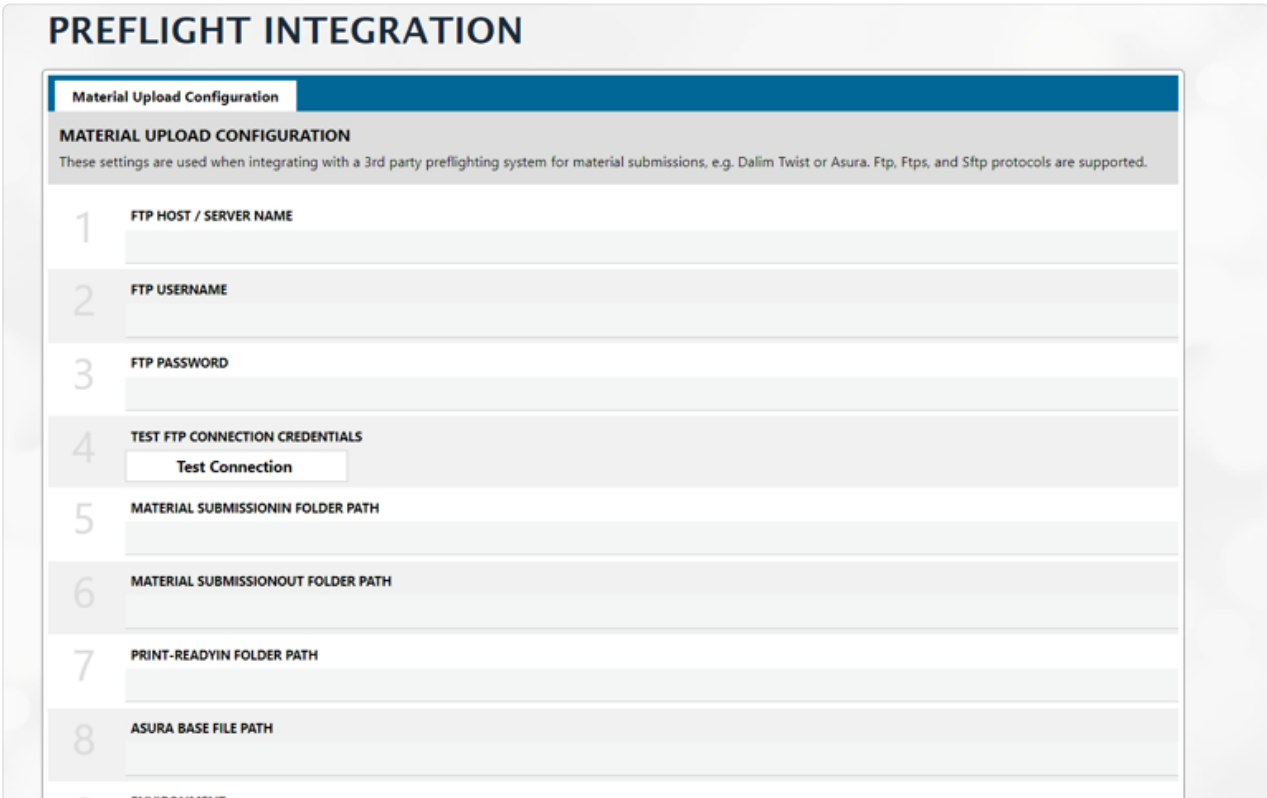
International Tax ID Required for Approval
☐ No

Registered Company No. Required for Approval
☐ No

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 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.



The screenshot shows a web interface titled "PREFLIGHT INTEGRATION". Below the title is a tab labeled "Material Upload Configuration". Under this tab, the section "MATERIAL UPLOAD CONFIGURATION" is displayed, with a note: "These settings are used when integrating with a 3rd party preflighting system for material submissions, e.g. Dalim Twist or Asura. Ftp, Ftps, and Sftp protocols are supported." The configuration is organized into a list of numbered fields (1-8) and a final section (9). Fields 1-4 are grouped under the heading "TEST FTP CONNECTION CREDENTIALS". Field 5 is "MATERIAL SUBMISSIONIN FOLDER PATH", field 6 is "MATERIAL SUBMISSIONOUT FOLDER PATH", field 7 is "PRINT-READYIN FOLDER PATH", and field 8 is "ASURA BASE FILE PATH". Field 9 is "ENVIRONMENT". A "Test Connection" button is located below field 4.

Field Number	Field Name
1	FTP HOST / SERVER NAME
2	FTP USERNAME
3	FTP PASSWORD
4	TEST FTP CONNECTION CREDENTIALS
5	MATERIAL SUBMISSIONIN FOLDER PATH
6	MATERIAL SUBMISSIONOUT FOLDER PATH
7	PRINT-READYIN FOLDER PATH
8	ASURA BASE FILE PATH
9	ENVIRONMENT

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.

The screenshot displays the 'CUSTOM DATA FORMS' configuration page. At the top, there's a header 'CUSTOM DATA FORMS' with a green icon. Below it, a 'Custom Data Form ID' field is set to 'CUST'. There are 'Refresh' and 'New' buttons. The 'Form Description' section contains a text area with the placeholder 'New Client Questionnaire'. The 'Long Description' section has a larger text area with the text 'We'd like to get to know you a little better. Please fill in this form to tell us a little more about your business and what you are trying to achieve.' The 'Form Type' is set to 'CRM Opportunities'. A checkbox 'Is this Form available on the Client Portal?' is checked. A note below states 'NOTE: Ticket Forms are not currently supported / allowed on the Client Portal.' Below this is a table with columns: 'Form Meta/Data', 'Template', 'Label/Question', 'Prompt Type', 'Validation', 'Formatting', 'Merge Tag', 'Required', and an action column. Two rows are visible in the table: one for 'Alternate Address (optional)' with 'Multi-Line Text' prompt type and 'Maximum Characters (Leave blank to unlimited)' validation; and another for 'Alternate Phone Number' with 'Single-Line Text' prompt type and 'Formatted Phone Number' validation. Both rows have 'TELEPHONE' as the merge tag and are marked as 'Required'.

Form Meta/Data	Template	Label/Question	Prompt Type	Validation	Formatting	Merge Tag	Required	
		Alternate Address (optional)	Multi-Line Text	Maximum Characters (Leave blank to unlimited)		ALTADDRESS	☐	
		Alternate Phone Number	Single-Line Text	Formatted Phone Number Maximum Characters (Leave blank to unlimited)		TELEPHONE	☐	

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



You are logged in as: **Underwater World Horsham**
[Account Settings](#) | [Logout](#)

MessagesSpecialsInvoicesOrdersProposalsMaterialsSettings

Specials

Invoices

Orders

Proposals

Materials

Forms

Pending Forms | Completed Forms

Forms and Questionnaires

View	Form Type	Regarding	Status
	Facebook Ads	Production information for Order number 12258 line number 31796 Starting Date: Monday, May 1, 2023 Available Until: Monday, May 1, 2023 Submitted on: Thursday, March 30, 2023 5:39:00 AM	Form Completed
	New customer questionnaire	Sales Inquiry number 1465 Estimated Start Date: Monday, May 1, 2023 Available Until: Monday, May 1, 2023 Submitted on: Friday, March 31, 2023 8:09:00 AM	Form Completed

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



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[Account Settings](#) | [Logout](#)

MessagesSpecialsInvoicesOrdersProposalsMaterialsSettings

Specials

Invoices

Orders

Proposals

Materials

Forms

Pending Forms | Completed Forms

New customer questionnaire

Order or Opportunity Information

We'd like to get to know you a little better. Please fill in this form to tell us a little more about your business and what you are trying to achieve.

Alternate Address (optional)

123 Main St

Alternate Phone Number

Website URL (required)

<https://navigaglobal.com>

What is your Advertising Goal (required)

Please select one or more from the dropdown list.

Branding, Informational

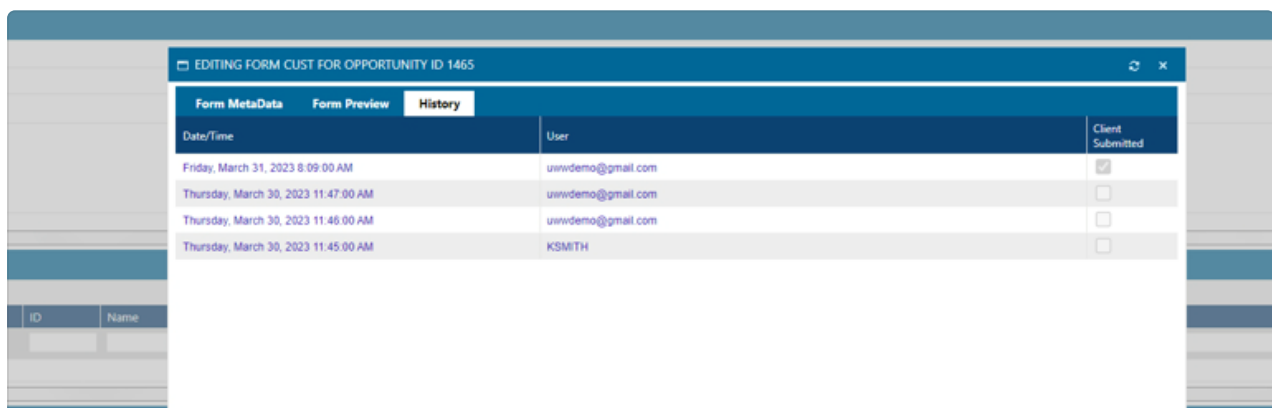
URLs of some of your competitors

Save and Complete Later

Save and Submit

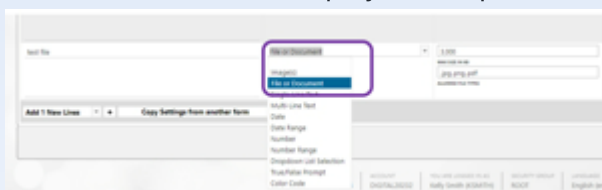
At the bottom of the form the customer can save if they wish to complete later or can save and submit. Upon submission, if it is an opportunity form type, then the sales rep on the opportunity will receive a CRM Alert and an email. If it is related to an order line, the rep on the order will receive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



Form MetaData Form Preview History		
Date/Time	User	Client Submitted
Friday, March 31, 2023 8:09:00 AM	uwwdemo@gmail.com	☒
Thursday, March 30, 2023 11:47:00 AM	uwwdemo@gmail.com	☐
Thursday, March 30, 2023 11:46:00 AM	uwwdemo@gmail.com	☐
Thursday, March 30, 2023 11:45:00 AM	KSMITH	☐

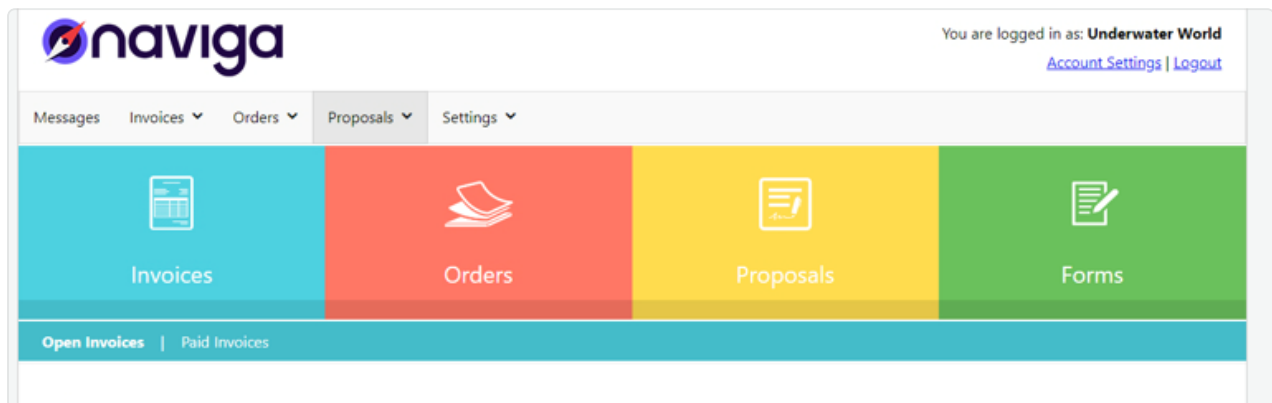
NOTE: for INTERNAL users, you can set up image and file/document upload question types on forms. The File/Document support is new for 23.2. Both of these are not yet supported on the portal and will be hidden from client view if they are setup on any forms that otherwise display on the portal.



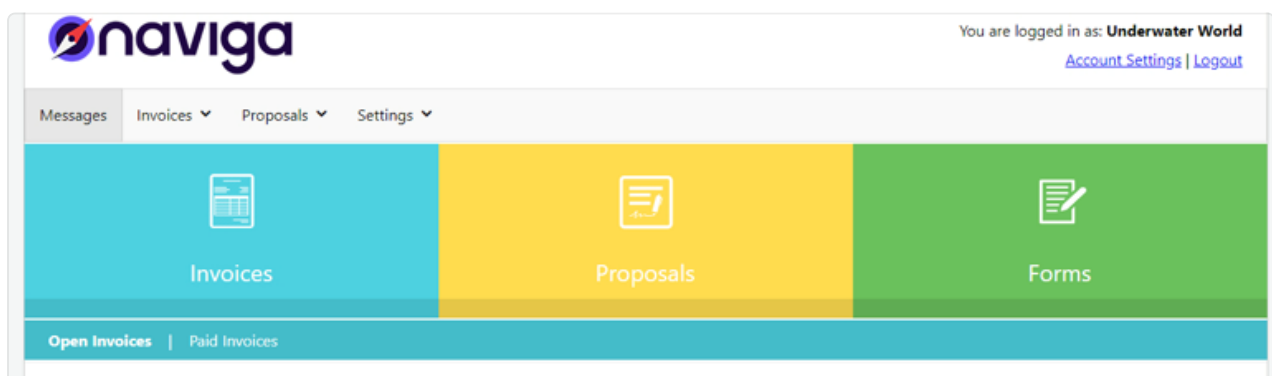
Disable Navigation Options

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.

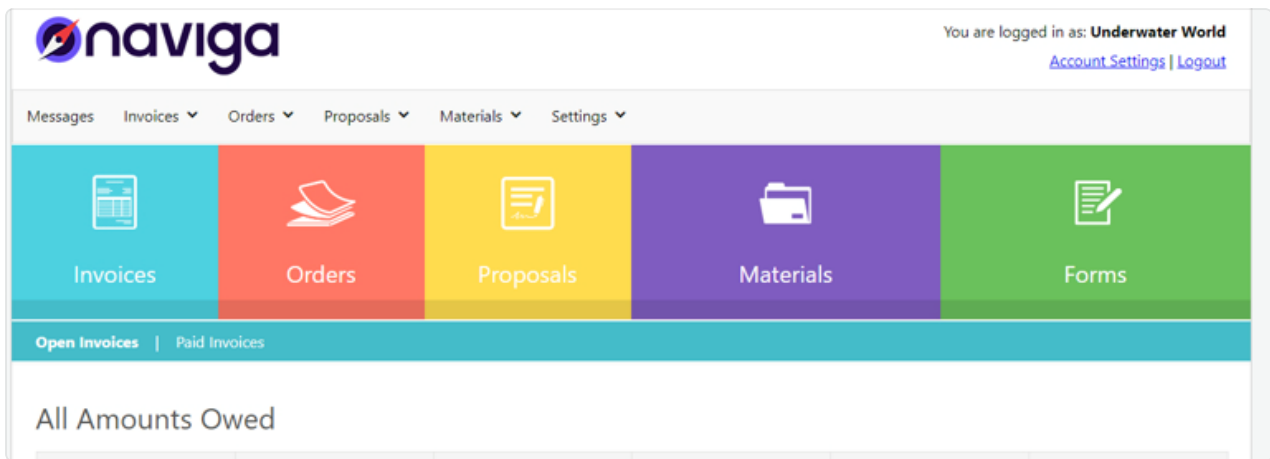
Now the navigation and page will be removed completely if you choose to disable certain items.



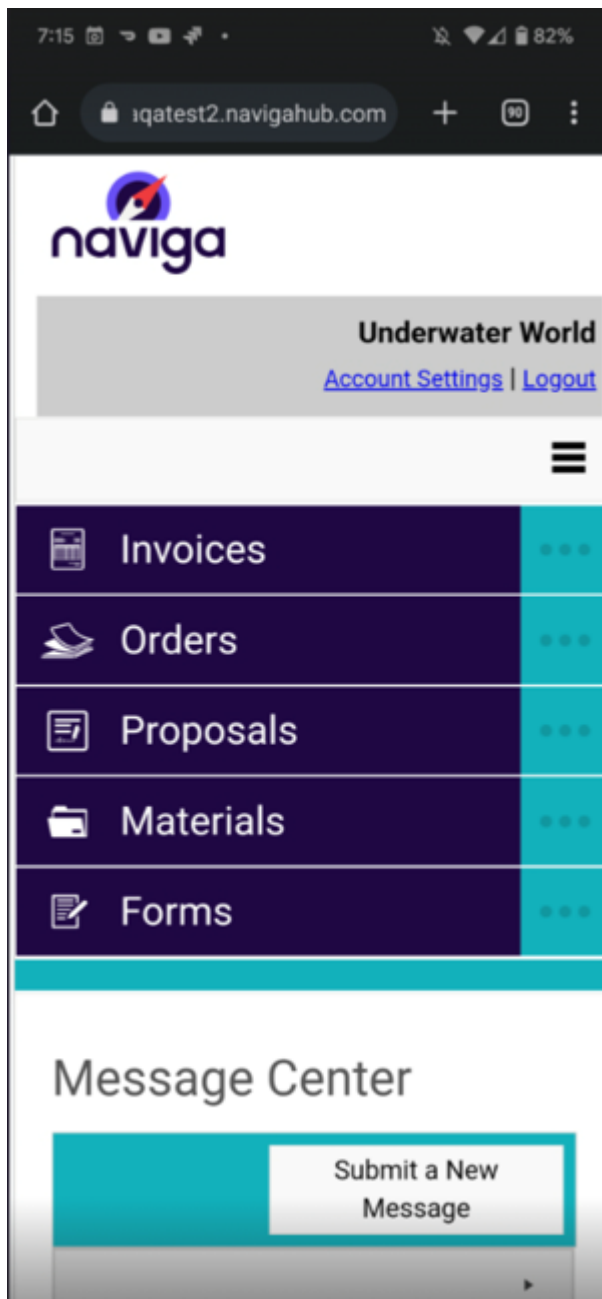
Previously, under the hood, these navigation icons were in a 6-unit grid and each button took up one unit. The way this was rendered, was dependent on browser size. For example, these would stack on a phone and be displayed in a row on a computer. Now, this is using a grid layout of 12-units. When you 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)