

User Guide 2022.1



Table of Contents

Purpose	3
Advertising Module.....	3
Classified Packages Pretax Price Override	3
Commissions Report Written Off Invoice	4
Material Search by Naviga ID and Quick Info Size Display.....	5
Defaults of Client Type.....	5
Tickets	6
Ticket Type Setup.....	6
Tickets Status Code	6
Tickets Priorities.....	7
Create Ticket	7
Tickets Dashboard.....	7
Print Product Production Configurable Fields	8
Close Date Override by Section	9
Group Analysis by Brand	10
Ratecard Agency/Client – Brand	11
Commissions Based on Payments Report.....	11
Zero Invoice Line Suppressed on a Product.....	12
Salesrep Activity Report.....	14
Cancel at Full Value.....	14
Minimum and Maximum Depth (Height) Ratecard Line.....	17
Regenerate Billing Comments.....	19
Reversed Tax	20
Quick Line Entry Copy	22

Renew Campaign Line Adjustments	23
Prepare Billing Screen Net Amount	23
Position Import New Fields	24
Import Queue Monitor	25
Hide Zero Lines on Confirmation Template	25
Disable Amount Changes on Custom Allocations Flag	26
Portal Setup Product Groups	27
PlanSmart Hold Back Field	29
CRM.....	30
Section and Position in Opportunity Products.....	30
Exhibition	31

User Guide 2022.1

Purpose

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

Advertising Module

Classified Packages Pretax Price Override

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

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

The screenshot shows the 'CLASSIFIED PACKAGE' window with a tabbed interface. The 'Product Selection' tab is active. It features a 'Select a Category Tree' dropdown set to 'Automotive' and a 'Select a Package' dropdown. Below these is a table with columns 'Product' and 'Iss'. The table currently shows '-- No Records --'. To the right, a search box 'Type here to filter/search' is present, followed by a list of products with checkboxes. Two items are checked: 'The Navigator Daily Paper (DEMO18)' and 'The Star Daily Newspaper (DEMO10)'. A red highlight is on 'The Star Daily Newspaper Online (DEMO21)'. A '+ sign' is next to the list, and a 'Delete' button is at the bottom right.

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

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

CLASSIFIED PACKAGE

Product Selection Category MetaData Create Material Adjustments Price Breakdown **Book & Pay**

BILL-TO ID **BILL-TO NAME** **TAKE PREPAYMENT** **FIRST RUN DATE** **TOTAL AMOUNT DUE**
 255609 Rafferty Subaru No Wednesday, November 24, 2021 870.45

Product Summary	First Run Date	Last Run Date	Total Days Running	Total Price	Tax Amount	Total with Tax
The Star Daily Newspaper DEMO19	11/24/2021 WEDNESDAY	12/15/2021 WEDNESDAY	4	829.00	41.45	870.45
			4	829.00	41.45	870.45

BOTTOM LINE OVERRIDE

The difference between the actual calculated price and the override price entered here will be generated as an adjustment and applied proportionately to each line in this package buy.

Be sure to change this value AFTER you have set all other attributes of the buy.

Override Final Price (before Tax)

Price Override Description

Apply

Previous Finish

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

Commissions Report Written Off Invoice

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

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

Search on the Salesrep and period.

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

PinPoint

Advertiser Ranking

Commissions

DIGITAL COMMISSIONS

Shirley High (SHIGH)

2021-11

All Commissions

Rep Commissions

Unselect All

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

Campaign ID	MM ID	Campaign Type	Advertiser	Brand	Agency	Line ID	Product	Line Description	Line Start	Line End	Other Reps	Rep's Share %	Rep's Amount	Commission %	Commission Amount	Invoice ID	Invoice Status	Only Pay Commissions on Paid Invoices	Processed	Processed Date
5229		Flexible	St. George Church	St. George Church		15439	Astronomy Magazine	1 Page override here allowed	2/15/2021	2/15/2021	SCONNORY	50.00%	4,000.00	3.00%	120.00			<input type="checkbox"/>	<input type="checkbox"/>	
7109		Performance	St. George Church	St. George Church		21179	Blackfeet Nation	CPM	12/7/2021	12/30/2021		100.00%	11.00	3.00%	0.33	SH1517443T	Partial Paid	<input type="checkbox"/>	<input type="checkbox"/>	
7175		Performance	Copt Yogurt	Copt Yogurt		21291	Astronomy Magazine	1/8 Page	1/3/2022	1/3/2022		100.00%	999.00	3.00%	29.97	SH1517444T	Written Off	<input type="checkbox"/>	<input type="checkbox"/>	
7109		Performance	St. George Church	St. George Church		21375	Blackfeet Nation	BP - Medium Rectangle (300 x 250)	12/7/2021	12/30/2021		100.00%	11.25	3.00%	0.34	SH1517443T	Partial Paid	<input type="checkbox"/>	<input type="checkbox"/>	
7109		Performance	St.	St.		21380	Canadian	1-Medium	12/7/2021	12/30/2021		100.00%	11.50	3.00%	0.35	SH1517443T	Partial	<input type="checkbox"/>	<input type="checkbox"/>	

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

Material Search by Naviga ID and Quick Info Size Display

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

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

The screenshot shows a web application window titled "SELECT MATERIAL FOR MINNESOTA TWINS". At the top, there are tabs for "Preview", "Usage", "Size", "External ID", and "Search". The "Search" tab is active, and a search bar contains the text "2667". A purple arrow points to the search bar. Below the search bar, there is a "Creatives" section with a "Sort by Date Received" dropdown set to "Descending". The main content area shows "Viewing Items 1 - 1 -- 1". A "Quick Info" pop-up window is displayed, showing details for material "Test [1/2 Page]". A purple arrow points to the "Size" field in the pop-up, which displays "1/2 Page".

Test [1/2 Page]		No. 2667
Material ID	2667	Material Record
Date Received	9/8/2021	
Ad Number		
Description	US Flag Image	
Ad Headline	Test	
Last Publication	Astronomy	
Last Issue	12/1/2021	
Color	Full Color	
Size	1/2 Page	

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

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

Defaults of Client Type

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

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

CLIENT TYPE DEFAULTS

Client Type Defaults

Client Type: National

Client Defaults
These defaults are used when creating new Clients

Default Payment Terms: 5% Discount 10 Days

Default Tax Code: 5 % TAX

Default Credit Limit: 30,000.00

Default Credit Rating: Good

Credit Stop Days (Ad): 1,000

Default Customer Credit Control Status: First Call

Default Services Charges: ☒ Yes

Default Show Due / Discount Date on Invoice: ☒ Yes

Auto Approve New Clients: ☒ Yes

Prepayment Required for Advertising Orders: Prepayment NOT Required

Cap Actuals: ☐ No

Actuals Reconciliation: Use Third Party Numbers

Cancel Save

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

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

Tickets

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

Ticket Type Setup

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

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

Tickets Status Code

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

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

Tickets Priorities

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

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

Create Ticket

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

The screenshot shows the 'NEW TICKET FOR CAMPAIGN 7416' form. At the top, there are tabs for 'Main Menu', 'Ad Home', 'Customers', and 'Campaigns'. The 'Campaigns' tab is selected, showing a list of campaigns. The 'NEW TICKET FOR CAMPAIGN 7416' form is open. It has a header bar with 'Home' and 'Sales Activity' tabs. The form includes the following fields and sections:

- Ticket Type:** Financial Review (dropdown)
- Currently Assigned To:** Shirley High (dropdown)
- Priority:** Ignore and see if it goes away (dropdown)
- Status:** Pending (dropdown)
- Short Description:** First ticket (text area)
- Long Description:** First ticket (text area with rich text editor)
- Notes:** (tab)
- Regarding Line Items:** (tab)
- (Other) Line Items:** (active tab)
- History of Changes:** (tab)

The '(Other) Line Items' tab shows a table with the following data:

ID	Product	Description
21783	Astronomy Magazine Size: 1/4 Page (4.25 x 5.5) Section: CONP Position: Conf1	1/8 Page
21784	Blackfeet Nation Size: Medium Rectangle (300x250) (300 x 250), Square Pop up (250 x 250), Small Square Section: Cultural	FR

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

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

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

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

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

Tickets Dashboard

This menu allows you searching on the tickets.

Navigate to the menu Campaigns -> Tickets Dashboard.

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 PinPoint Advertiser Ranking Commissions

TICKETS DASHBOARD

Ticket Types Assigned To Entered By Priorities Status Include Closed Closed from Closed to Select Data

Shirley High

All Items checked Yes

Pending	Open	Under Review	On Hold	More Information Required	Closed / Completed
0	1	1	0	0	1

Selected Tickets Configure Output

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

Ticket ID	Campaign ID	Type	Short Description	Status	Priority	Assigned To	Created by User	Created Date/Time	Last Updated by	Last Updated
19	7416	Change Request	test closed	Closed / Completed	Drop Everything and Deal with this!	Shirley High	Shirley High	Wednesday, December 1, 2021 4:47:07 PM	Shirley High	Wednesday, December 1, 2021 4:47:35 PM
18	7416	Cancellation / Credit Request	First ticket	Under Review	High Priority	Shirley High	Shirley High	Wednesday, December 1, 2021 4:31:14 PM	Shirley High	Wednesday, December 1, 2021 4:43:28 PM
8	7370	Financial Review	test ticket	Open	Normal Priority	Shirley High	Shirley High	Monday, November 22, 2021 3:04:00 PM	Shirley High	Monday, November 22, 2021 3:04:52 PM

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

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

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

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

Print Product Production Configurable Fields

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

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

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

13 Master 13

Refresh Screen w/ Filters

Selected Campaign Lines **Configure Output**

ON SCREEN COLUMNS

Reset Configuration Save Configuration

Available Grid Columns

- Int. Note
- Internal Comment
- Order Sales Rep(s)
- Brand Sales Rep(s)
- Primary Contact Phone
- Primary Contact Email
- Order Contact
- Order Contact ID
- Order Contact Phone
- Order Contact Email
- Demographic Code
- Demographic Description

Selected Grid Columns

- Line No.
- Campaign
- Advertiser
- Issue Date
- Primary Contact
- Master Status ID
- Material
- Columns
- Width in Inches
- Height in Inches
- Preview of Final

Available Export Columns

- Product ID
- Product
- I/O Received
- Issue Description
- Line Type ID
- Unit of Measure
- Size Code
- Color Code
- Page No.
- Width in Points
- Height in Points
- Width in Agates

EXCEL EXPORT



Reset Configuration

Click the “Selected Campaign Lines” tab.

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	Advertiser	Issue Date	Primary Contact	Master Status ID	Material	Columns	Width in Inches	Height in Inches	Preview of Final
67										
20344.1	6707	J.W.Schultz	11/1/2021		6	4707	5,000	8,500	11,000	
20507.1	6706	J.W.Schultz	11/1/2021		1		5,000	8,500	11,000	

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

Close Date Override by Section

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

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

Home Sales Activity Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinPoint Advertiser Ranking Commissions

Zone Groups
Zone Setup
Zone Import
Zone Import by Date Range
Classified Categories
EVENT-BASED SETUP
Event Billing Schedules

Allow Edition Splits ☒ Yes

Material Lead / Closing Settings

Material Lead Time (Days) 0
Default Issue Closing Days 10
Default Issue Closing Time

Material Lead / Closing Settings - Overrides by Ad Type

Ad Type	Section	Category Tree	Days of Week	Material Lead Time (Days)	Issue Closing Days	Issue Closing Time
Inserts (INS)	Display (DISP)				2	12:00 PM
Display Advertising (NR)						

Type here to filter/search

☐ Conflicts (CONF)
☐ Display (DISP)
☒ Friday Only Section (FridayOnly)
☐ Limited date range section (LTD)
☐ Listings (LIST)

Affiliate Publisher
Default Affiliate Commission Percent 0.00

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

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

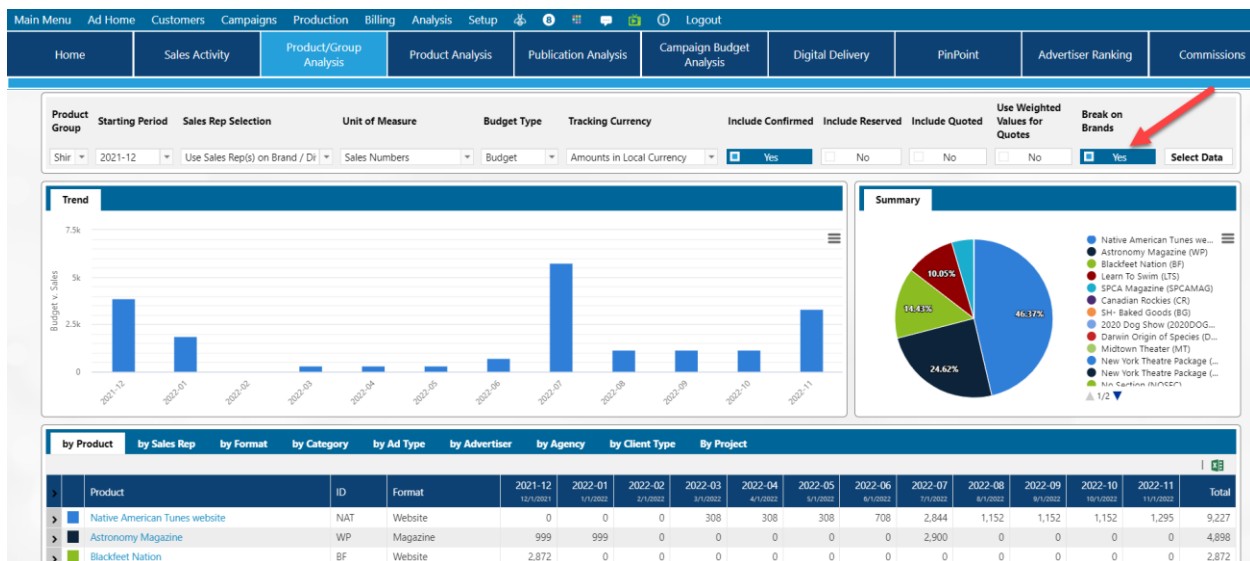
When creating the line item, the system displays the issues up to the override number of days before the issue closes.

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

Group Analysis by Brand

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

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



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

Ratecard Agency/Client – Brand

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

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

ID	Size	Color	Line Desc.	Allow Description Override	Lines	Section	Position	Ad Type	G/L Type	Default Production Status	Columns	Inches or Centimeters or Agate Lines	Production Link	External ID	Rate	Inactive	No Tax	View Line Change
1112	8.5x11 (1 Page)		Display	No	420,000			Display Advertising	Print Display		0.00	0.00			2,000.00000	No	No	View Line Change

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

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

Commissions Based on Payments Report

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

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

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

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

COMMISSIONS BASED ON PAYMENTS

Payment Type

Payment Period

Select Data

Results

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

Client ID	Client Name	Payment Type	Payment Ref	Payment Amount	Invoice ID	Invoice Date	Invoice Amount	Applied Amount	Applied Percent	Module	Campaign Type	Prepayment for Campaign (C)	Campaign ID	Line ID or Invoice Line ID	Advertiser ID	Advertiser Name	Product ID	Product Name	Payment Date	Run Date	Line Amount	Rep ID	Rep Name	Rep Percent	Rep Net Amount	Rep Applied Amount
				Y			Y	Y	Y	Y									Y		Y		Y		Y	Y
255073	Super Tutor	Pre-Payment	202112132	1,000.00			1,000.00		40.82%	Advertising	Performance	5232			255073	Super Tutor	BF	Blackfeet	12/13/2021		2,100.00	SHIGH	Shirley High	100.00%	2,100.00	857.14
255073	Super Tutor	Pre-Payment	202112132	1,000.00			1,000.00		40.82%	Advertising	Performance	5232			255073	Super Tutor	SPCA	SPCA Magazine	12/13/2021		350.00	SHIGH	Shirley High	100.00%	350.00	142.86
255073	Super Tutor	Pre-Payment	20211213	50.00			50.00		6.49%	Advertising	Performance	5103			255073	Super Tutor	AST	Astronomy	12/13/2021		770.00	SHIGH	Shirley High	100.00%	770.00	50.00
255029	Metro Legal	Payment	3000	3,000.00	IN1514741T	4/30/2020	1,026.00	1,026.00	100.00%	Advertising	Performance	3096	9952	255029	Metro Legal	AST	Astronomy	12/13/2021	4/13/2020	570.00	SCONNORY	Sean Connery	100.00%	519.00	570.00	
255029	Metro Legal	Pre-Payment	3000	3,000.00			540.00		101.89%	Advertising	Flexible	4914			255029	Metro Legal	BF	Blackfeet	12/13/2021		200.00	SHIGH	Shirley High	100.00%	200.00	203.77
255029	Metro Legal	Pre-Payment	3000	3,000.00			540.00		101.89%	Advertising	Flexible	4914			255029	Metro Legal	AST	Astronomy	12/13/2021		330.00	SHIGH	Shirley High	100.00%	330.00	336.23
255029	Corporate	Payment	2021128	40.00	57811516400T	12/8/2021	105.00	40.00	38.10%	Advertising	Performance		5211	15583	255029	Corporate	DEVIC18	The Navigator Daily Paper	12/8/2021	12/13/2021	50.00	SHIGH	Shirley High	100.00%	50.00	19.05
255029	Corporate	Payment	2021128	40.00	57811516400T	12/8/2021	105.00	40.00	38.10%	Advertising	Performance		5211	15584	255029	Corporate	DEVIC10	The Star Daily Newspaper	12/8/2021	12/9/2021	50.00	SHIGH	Shirley High	100.00%	50.00	19.05
																								4,363.00	2,198.10	

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

Zero Invoice Line Suppressed on a Product

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

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

Main Menu Ad Home Customers Campaigns Production Billing Analysis Setup Logout									
Home	Sales Activity	Product/Group Analysis	Product Analysis	Publication Analysis	Campaign Budget Analysis				

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: AST
Product Name: Astronomy
Format: Magazine
Inactive: ☐ No

General Settings

Product Type: Print Product (eg. Magazine, Newspaper)
Default Production Form: Facebook
Ad Serving Platform:
Invoice Line Group: Print Lines
Hide Zero Value Lines on Invoices: ☒ Yes
When set to YES, lines with a zero value will not display on invoices.
Affidavit Template Form: Shirley's Affidavit Template
Product URL:
Company: LIVEDATA
Primary Group: Nature Pubs and Digital
Holiday Calendar(s):

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

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

The screenshot shows the 'Campaign Setup' interface. The 'Line Items' tab is selected, displaying a table with the following data:

ID	Product	Description	Copy	Ad Type	Start Date	End Date	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Total	Ratecard Price Variance %
15617	Astronomy (Size 1 Page (8 x 11))	1 Page	NR	NR	12/18/2021	12/18/2021	0.00	---	---	---	---	---	---	---	---	---	---	---	---	0.00	0.00%
15619	Astronomy (Size 1 Page (8 x 11))	1 Page	NR	NR	12/18/2021	12/18/2021	770.00	---	---	---	---	---	---	---	---	---	---	---	---	770.00	0.00%
15620	Blackfeet (Size 3:1 Small Billboard (300 x 100))	CPM	CPM	CPM	12/16/2021	12/31/2021	200.00	---	---	---	---	---	---	---	---	---	---	---	---	200.00	0.00%
																			970.00	970.00	

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

The screenshot shows the 'please remit payment to' section and the 'payment due' section. The 'payment due' section shows the following details:

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

The 'digital lines' section shows the following data:

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

The 'print lines' section shows the following data:

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

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

Questions? Call us at 310.555.1234		Agency Commission	0.00
		Net Amount	970.00
		Pre-Paid Amount	0.00
		Payment Amount Due	\$ 970.00
		Payment Due Date	1/12/2022
		Discount if Paid by 12/23/2021	19.40

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

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

The invoice can be split by products.

Salesrep Activity Report

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

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

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

SALES ACTIVITY REPORT

Product Group

Shirley's Nature Groups

or Select Product(s)

or Select Product(s)

Order Sales Rep

(Optional)

Starting On

11/1/2021

Ending On

12/31/2021

Refresh Data

Campaigns

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

Page: 1 of 2

Go

Page size: 50

Change

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

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

Cancel at Full Value

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

or for any reason. But the publication wants the advertiser to pay the full price, even though the advertiser is reducing the days of the ad.

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

The screenshot shows the 'LINE SETTINGS' window with the 'Cancel at Full Value' checkbox checked. A red arrow points to this checkbox. The window is divided into several tabs: 'Line Settings', 'Day of Week Rate Overrides', 'Special Date Rate Overrides', 'Discount Escalation', and 'Rate Escalation'. The 'Line Settings' tab is active, showing fields for Line ID (1111), Line Description (Insert), Sort (1), Size (1/2 Page Horizontal), Color (Color), Section (Display), Position (All), Ad Type (Insert Flyers (Flat Fee)), G/L Type (Print Display), G/L Project, Production Link, External ID, Minimum Depth, Maximum Depth, Unit of Measure (Undefined), Use Columns Count in Calculation (No), Rate (400.00000), Default Quantity, Lines (410.000), Columns, Inches, Allow Description Override (No), No Tax (No), Only Allow this Rate on Packages (No), Cancel at Full Value (Yes), and Is Inactive (No). At the bottom, there are buttons for Cancel, Delete, Previous, Next, and OK.

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

The screenshot shows the 'Campaign Management' interface. The 'Line Details' tab is active, showing the 'Classified Package' as 'Astronomy Magazine' and 'Quick Line Entry' as 'Insert Flyers (Flat Fee)'. The 'Advertising Orders' section shows a table with columns for ID, Product, Description, Copy, Ad Type, Start Date, End Date, Dec 2021, and Total. A row is visible for ID 22160, Product Astronomy Magazine, Description Insert, Ad Type INSPF, Start Date 12/16/2021, End Date 12/23/2021, Dec 2021 1,200.00, and Total 1,200.00. The 'Linked Exhibition Orders' section is also visible at the bottom.

You can bill the campaign or leave as just confirmed.

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

[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](#)
[PinPoint](#)
[Advertiser Ranking](#)
[Commissions](#)

Campaign
 Campaign Setup
 Line Items
 Edit CRM Delivery
 Campaign Budget
 Campaign Production Forms
 Digital Serving Analysis
 Billing Schedule
 Co-op Billing
 User Defined Fields
 Notes / Comments
 Journal Entries
 Revenue Allocation
 Production Contacts
 Teasheet Contacts
 Generate Proposal / Confirmation
 Attachments
 Invoices & Payments
 Rep Commissions
 History of Changes
 Go to CRM View
 Go to Advertiser View

Advertiser Budget: 0.00 Currency: Local Currency

Line Details Applied Incentives Tickets

Classified Package Quick Line Entry Select a Product Select an Ad Type Full Line Entry Prod. Schedule Audience Planner Audience Reach Send a Confirmation

Advertising Orders

Split Lines Delete Selected Lines Check Incentives Bulk Update Metadata Numbers in the Grid Display Estimated Net Amounts

ID	Product	Description	Copy	Ad Type	Start Date	End Date	Dec 2021							Total	Ratecard Price Variance %
22160	Astronomy Magazine	Insert	INSFF	12/16/2021	12/16/2021		380.00							380.00	-5.00%
22161	Astronomy Magazine	Insert	INSFF	12/20/2021	12/20/2021		820.00							820.00	+105.00%
							1,200.00							1,200.00	

Linked Exhibition Orders

Attach an Exhibition Order New Exhibition Order

ID	Exhibition	Start Date	Status	Order Amount	Tax Amount	Total Amount	Edit	Remove
-- No Records --								

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

Click the split line and click the "Adjustments" tab.

EDITING FLAT FEE LINE: 22161

Line Details Creatives / Materials Production Notes Other Options User Defined Fields Category MetaData Rep Assignments Affidavits

Product Astronomy Magazine Size 1/2 Page Horizontal (8.5x5.5) Pricing per Issue

Ad Type Insert Flyers (Flat Fee) G/L Type Print Display Ratecard Flat Fee 400.00000

Contract Color Adjustments 420.00000

Edition(s) Section Display Adjusted Flat Fee 820.00000

Ratecard May 20-22 FDFP Position All Total for all Issues

Ratecard Line ID 1111 Target Demographic Total Amount 820.00

Description Insert Use Edition Splits No Estimated Tax 41.00

Lines / Page Eq. 410 0.976 Estimated Total 861.00

Line Details Adjustments

ID	Description	Gross/Net	Qty	Amount	Percent	Total Amount
	Frequency Break: 2x Discount	Gross			-5.00000 %	-20.00000
	Cancellation Reallocation (12/23)		1.00	440.00000		440.00000

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

Minimum and Maximum Depth (Height) Ratecard Line

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

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

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

The screenshot displays the 'LINE SETTINGS' form. The 'Line Settings' tab is selected. The 'Line ID' is 829, 'Ad Type' is 'Per Character', and 'Base Rate' is 10.00000. The 'Line Description' is 'Per character', 'G/L Type' is 'Print Classified', and 'Base Qty' is 1.00. The 'Sort' is 4, 'G/L Project' is empty, and 'Overage Rate' is 10.00000. The 'Color' is 'Color', 'Production Link' is empty, and 'Default Quantity' is empty. The 'Section' is 'Listings', 'External ID' is empty, and 'Lines' is 1.000. The 'Position' is 'Everywhere', 'Minimum Depth' is 6.00, 'Maximum Depth' is 6.00, 'Columns' is empty, and 'Inches' is empty. The 'Unit of Measure' is 'Inches', 'Allow Description Override' is 'No', 'No Tax' is 'No', 'Only Allow this Rate on Packages' is 'No', 'Cancel at Full Value' is 'No', and 'Is Inactive' is 'No'. A sidebar on the left shows a list of lines with IDs 974, 785, 786, 829, 830, 831, and 832. Two red arrows point to the 'Minimum Depth' and 'Maximum Depth' fields.

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

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

Enter the exact depth as setup.

The screenshot shows the 'NEW COST PER UNIT LINE' form. The form includes fields for 'Pick-up Material', 'Ad Headline', 'Sort Text', 'Columns', and 'Approval Status'. A 'SAVED' confirmation dialog is displayed in the center, with a green checkmark and the text 'Saved' and 'OK'. A red arrow points from the 'SAVED' dialog to the 'Add Line' button at the bottom right. The 'INSERTION PREVIEW STATS' section is visible on the right, showing details for Lines, Height, Width, and Other.

INSERTION PREVIEW STATS			
Lines	84 agate lines	30 text lines	
Height	6 in	15.24 cm	432 pt
Width	2.12 in	5.385 cm	152.64 pt
Other	120 words	839 characters	

Buttons: Download Image, Download PDF, Cancel, Add Line

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

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

Regenerate Billing Comments

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

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

The screenshot shows a web application interface with a top navigation bar and a sidebar. The main content area is titled "Selected Invoices" and contains a table of invoice data. A modal window titled "REGENERATE INVOICES" is open, displaying fields for "Address to Use", "Display REPRINT on Invoice", and "Comment to Print on Invoices".

Selected Invoices Table:

ID	Date	Customer	Amount	Tax	Total Amount	Balance	View PDF	
IN1516471T	1/4/2022	Shir's Agency	2,655.56	0.00	2,655.56	2,655.56		<input checked="" type="checkbox"/>
			2,655.56	0.00	2,655.56	2,655.56		

REGENERATE INVOICES Modal:

- Address to Use:** Use the Current Address (dropdown menu)
- Display REPRINT on Invoice:** ☐ No
- Comment to Print on Invoices:**
- Buttons:** Cancel, Regenerate Invoices

At the bottom right of the main interface, there are buttons for "Reset" and "Regenerate Selected Invoices".

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

Reversed Tax

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

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

Campaigns Production Billing Analysis Setup Logout

Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery

TAX MAINTENANCE

Tax Details

Tax ID: 5 New

Tax Description: 5 % TAX

Override Description for Invoicing: This is the 5% tax override description for invoices

Tax Rate: 5.000

Inactive: ☐ No

Reverse Out Tax: ☒ Yes

Vendor Payment Withholding Information

Exempt Amount: 0.00

Exemption Reason: None

Other Taxes to Apply First

First Tax to Apply:

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

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

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

Production Billing Analysis Setup Logout

Product/Group Analysis Product Analysis Publication Analysis Campaign Budget Analysis Digital Delivery PinP

More information

Bill-to ID: 255209

Bill-to Name: Metro Legal

Charge Credit Card: ☐ No

P.O. Required: ☐ No

Last Verified Date:

Advertising Billing

Billing Group:

Tax Code: 5 % TAX

Terms: 2% 10 DAYS

Digital Agency %: 0.00

Show Due Date: ☒ Yes

Delivery Method: Print & Email

Actuals Reconciliation: Use Ad Server Numbers




Cap Actuals: ☒ Yes

Override Invoice & Statement Form Settings

Performance Invoice Form: Select an Invoice Form

Flexible Invoice Form: Select an Invoice Form

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

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

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

Quick Line Entry Copy

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

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

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

EDITING FLAT FEE LINE: 15687

Line Details	Creatives / Materials	Production Notes	Other Options	User Defined Fields	Category MetaData	Rep Assignments	Affidavits
Product	SH University Pub		Size	1/3 Page (6x8)		Pricing per Issue	
Ad Type	Display Advertising		G/L Type	Print Display		Ratecard Flat Fee	1,000.00000
Contract			Color			Adjustments	-112.00000
Edition(s)			Section	Main		Adjusted Flat Fee	888.00000
Ratecard	SU University Pub		Position	Main		Total for all Issues	
Ratecard Line ID	878		Target Demographic			Total Amount	1,776.00
Description	Display					Estimated Tax	0.00
Lines / Page Eq.	140	0.333				Estimated Total	1,776.00

Line Details	Adjustments						
ID	Description	Gross/Net	Qty	Amount	Percent	Total Amount	
	SHU Latest volume	Net			-10.00000 %	-100.00000	✖
	Custom Rate Override		1.00	-12.00000		-12.00000	✖

Save the line.

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

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

Renew Campaign Line Adjustments

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

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

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

Prepare Billing Screen Net Amount

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

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

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

Print Invoice(s)

Generate Order Data File

Download Order Data Files

Regenerate Invoice(s)

Reverse Campaign Invoicing

Campaigns with Problems

Billing Schedule Issues

Credit Issues

Missing Actuals

Credit Card Issues

Campaigns Awaiting Credits

Product Group

Nature Publs and Digital

-OR- Specific Product

Ad Type

Specific Campaign IDs

Prepared Campaigns

Return All Campaigns

Pre-Payment

Return All Campaigns

Selected Campaigns

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

Page: 1 of 4

Go

Page size: 25

Change

Campaign	Advertiser	Brand	Agency	Billing Group	Product Group	Line ID	Product	Line Start	Line End	Line Type	Currency	Est. Amount	Actual Amount	Agency Comm.	Tax Amount	Net Amount	Pre-Paid	Auto Pay	P.O. Number	Delivery Method	
4588	Super Tutor	College Apps Tutorials	Shir's Agency		NATS	14707	Astronomy	5/06/2021	5/06/2021	FF		600.00	600.00	30.00	28.50	598.50	N	False		Email & Print	
4624	Metro Legal	Legal Services			NATS	14226	Blackfeet	5/1/2021	5/31/2021	PROD		1,016.39	1,016.39	0.00	0.00	1,016.39	N	False		Email & Print	
4624	Metro Legal	Legal Services			NATS	14226	Blackfeet	6/1/2021	6/30/2021	PROD		983.61	983.61	0.00	0.00	983.61	N	False		Email & Print	
4624	Metro Legal	Legal			NATS	14226	Blackfeet	7/1/2021	7/31/2021	PROD		1,016.39	1,016.39	0.00	0.00	1,016.39	N	False		Email & Print	

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

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

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

Position Import New Fields

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

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

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

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

For example, some of these fields are as follows:

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

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

Import Queue Monitor

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

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

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

Home

Sales Activity

Product/Group Analysis

Product Analysis

Publication Analysis

Campaign Budget Analysis

Digital Delivery

PinPoint

Advertiser Ranking

Commissions

IMPORT MONITOR

Start Date

End Date

Select Data

Results

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

Import ID	Type	File Name	Imported by	Date/Time	Total Rows	Status	Errors
145	M	ar_invoice_import (4).xlsx	SHIGH	Tuesday, January 25, 2022 1:03 PM	4,014	Not Started	
169	Issue Orders	campaign_issue_import (11).xlsx	SHIGH	Tuesday, January 25, 2022 12:40 PM	1,269	Not Started	
168	Historical Campaigns	campaign_history_import (10).xlsx	SHIGH	Tuesday, January 25, 2022 12:18 PM	1,011	Not Started	
138	Advertisers / Agencies	name_import (8).xlsx	SHIGH	Tuesday, January 25, 2022 11:45 AM	1,200	Completed	
					7,494		

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

Hide Zero Lines on Confirmation Template

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

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

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

naviga
Venture Forward

Campaign No: 7712
Today's Date: 2 Feb 2022
P.O. Number:
Sales Rep: Shirley High

bill-to
Coptic Church
78 Saint Mark Avenue
7th Floor
MINNEAPOLIS, MN 55442
Tel: (763)989-6754
Account No: 255471

advertiser
Coptic Church
78 Saint Mark Avenue
7th Floor
MINNEAPOLIS, MN 55442
Tel: (763)989-6754
Account No: 255471

campaign summary

Description	
Start Date	3/1/2022
End Date	4/1/2022
Currency	

cost summary

Base Amount	\$999.92
Adjustments	\$0.08
Gross Amount	\$1,000.00
Agency Commission	\$100.00
Net Amount	\$900.00
Estimated Tax	\$0.00
Total	\$900.00

print lines

Line No.	Product	Description	Issue / Run Date	Quantity	Rate	Adjusted Rate	Amount
-- No Line Items --							

digital lines

Line No.	Product	Description	Start	End	Quantity	Rate	Amount
18257	Blackfeet	CPM	4/1/2022	4/1/2022	10,000	99.92	1,000.00

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

Disable Amount Changes on Custom Allocations Flag

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

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

Advertising Security

5 **DEFAULT PROPORTION BY**
Use Default Settings
The system default will recognize revenue proportionally by day. Use this setting to change default to monthly (would use same amount each month even if campaign runs limited number of days in any month) or to custom. Custom setting requires user to select proportioning. For example this may be used for an accelerated online campaign. For performance campaigns these choices will set billing and revenue recognition, for flexible campaigns these choices govern revenue recognition as billing is controlled by the billing schedule.

6 **DISABLE CUSTOM ALLOCATIONS ON LINE ENTRY**
☐ No
Disallows the Custom Allocation.

7 **DISABLE AMOUNT CHANGES ON CUSTOM ALLOCATIONS**
☒ Yes
This only applies to Digital lines using Ad Types where a Qty is specified on each month container. This option will effectively only allow the user to change Quantities with the Custom Allocation option.

8 **ALLOWED TO ENTER ORDERS IN CLOSED ISSUES**
☒ Yes
Print issue setup requires an issue close date and time. Users without this permission will not be able to enter orders after close date/time.

9 **REQUIRE AUDIENCE SELECTION ON DATE-BASED PRODUCT LINES**
☐ No
For e-newsletters one may wish to select an audience. This can be used to default in CPM and to control the number of emails subscribers receive. This setting makes audience selection mandatory.

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

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

NEW COST PER THOUSAND LINE

Pricing Other Creatives Custom Fields Production Notes Category MetaData Sales Rep(s)

Product: Blackfeet Section: Cultural Ratecard CPM Rate: 20.00000

Ad Type: Cost Per Thousand Position: IMP2022 Adjustments: 0.00000

Contract: Dimension(s): Medium Rectangle (300x250) Discount Rate: 20.00000

Ratecard: 2022 G/L Type: CPM Estimated Impressions: 200,000

Ratecard Line ID: 884 Material Status: Estimated Amount: 4,000.00

Description: CPM Estimated Tax: 0.00

Estimated Total: 4,000.00

Line Details Tracking Services Engagement Tracking Adjustments

Start Date: 3/1/2022 End Date: 4/1/2022 Total Days: 32 Proportion Values: Custom

Month	Days	Available	Estimated Imps.	Estimated Amount	Ad Server Total Imps.	Ad Server Viewable Imps.	Ad Server Clicks	Ad Server Current as of	Actual Imps.	Actual Clicks	Actual Amount	Invoice	Credit	Credit
Mar 2022	31	19,994,351	193,750	3,875.00	0	0	0		0	0	0.00			<input type="checkbox"/>
Apr 2022	1	2,000,000	6,250	125.00	0	0	0		0	0	0.00			<input type="checkbox"/>

Can Only Edit the Estimated Quantity/ Impressions.

Field is Disabled and Cannot Edit the Estimated Amount

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

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

Portal Setup Product Groups

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

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

Campaigns
Production
Billing
Analysis
Setup
Logout


y
Product/Group Analysis
Product Analysis
Publication Analysis
Campaign Budget Analysis
Digital Delivery
PinPoint
A

PRODUCT GROUP DETAIL

Product Group Setup

- PRODUCT GROUP SETUP
 - Product Group Details**
 - G/L Overrides
 - Email Notifications
 - Endemic Industry Codes
 - Fabsoft Invoice Forms
- PRODUCT SETUP

Product Group Settings
G/L Defaults
Campaign Parameters
Refunds

Product Group: MOMS New
Product Group Name: Moms
Company: LIVEDATA
Reporting Group Only: ☒ Yes 
Charge Tax: ☐ No
Override Tax Code: Select an Override Tax
Derive G/L Codes from: Use Values in System Setup

Invoicing
Invoice Prefix:
Credit Prefix:

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

CLIENT PORTAL SETUP

Profile Selection

PROFILE SELECTION

The Client Portal system can be run under one or more profiles. A profile is a setup of rules that can represent different websites or properties. For instance, if you have Website A and Website B, and want to offer a different Self-Service portal for each, you could create a Profile A and B.

1 PROFILE ID

SH
▼

Create a New Profile

2 PROFILE DESCRIPTION

SH - Shirley

4 PRODUCT GROUP FILTER

Playbill (PB)

☐ Food Online (FO)
☐ Food and Beverage Online (Food)
☐ GALAXY WEBSITES (GALAXY)
☐ Gulf Publications (GULF)
☐ Health and Wellness (HEA)
☐ KS Demo Group (KS)
☐ Bauer Media Lifestyle (LI)
☐ Music Instruments (MI)
☐ Multimedia IT (MIT)
☐ Nature Pubs and Digital (NATS)
☐ PMNV (PMNV)
☐ RAY'S TEST (RAY)
☐ SH Package (SHPK)
☐ Retail (VA1)
☐ Disappearing Group (ZZZ)

1

1

Enter the minimum lead time for a campaign renewal. E.g. if the campaign expired yesterday, and you want to renew today, if you want say 3 days lead time minimum, enter 3 here.

2 RENEWAL START MAX DAYS

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

PlanSmart Hold Back Field

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

Navigate to the menu Setup -> Plansmart Setup.

3

EMAIL SYNC ERRORS

dan.pellegrini@newscycle.com x

Email these people if something goes wrong

4

ORDER CUT-OFF DAYS

0

5

REQUIRE APPROVAL FOR HI-RES FINAL

☒ Yes

Only hand back the hi-res final when requested (at our end point ~/interfaces/material/hi-res/{materialId}) if the Material is Approved. NOTE: For this rule to be enforced, you must setup Material Approval Status codes, AND set at least one to mean APPROVED.

6

HOLDBACK FUTURE DAYS

16

This setting allows you to NOT send orders to Plan if they are XX days in the future.

Status Code Mapping

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

CRM

Section and Position in Opportunity Products

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

Navigate to the menu Opportunities and enter a new opportunity.

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

Products

Copy

Sort

ID

Product

Ratecard

Ratecard Line / Description

Section / Position

Start/End

Ad Type

Rate

Qty

Price

Delete

0

AST

Astronomy

Astronomy (100)

1 Page

Anywhere

12/4/2021

NR

555.56000

1

555.56

0

BF

Blackfeet

All time (70)

Cost based on Thousands

Cultural

12/2/2021

CPM

20.00000

1,000

20.00

12/31/2021

Multi-Select

Three places

Add a Package

Add a Product: Select a Product

Proposals

ID

Brand

Agency

Proposal Date

Sales Rep

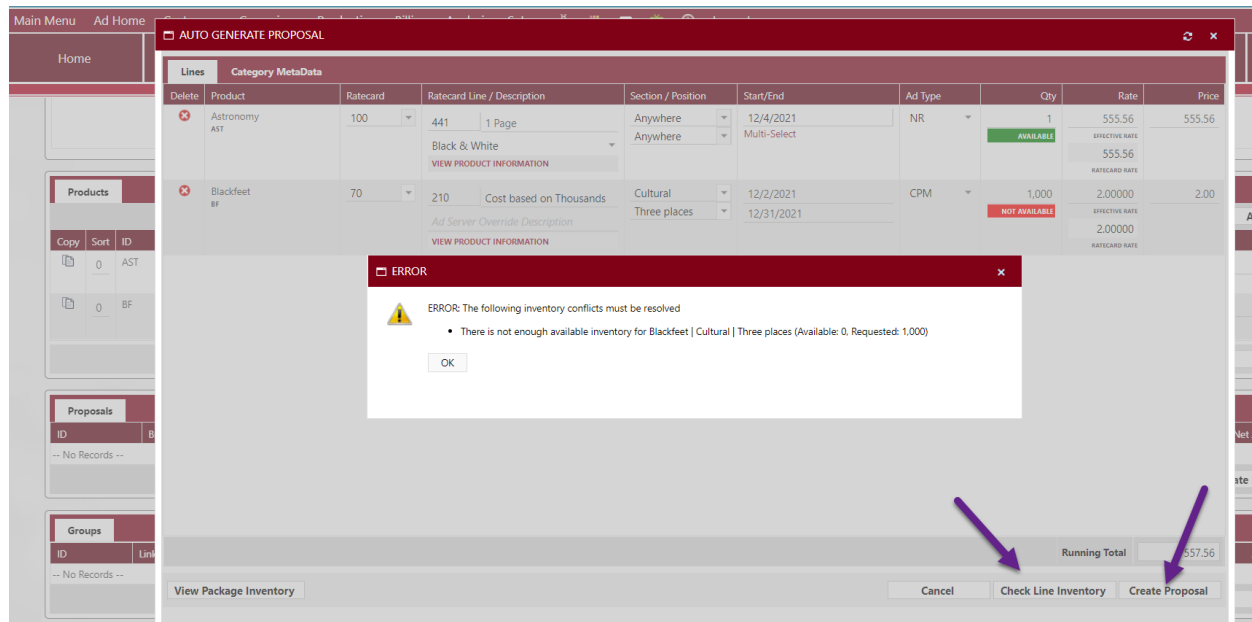
Net Amount

Remove

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

Save the opportunity.

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



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

Exhibition

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

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

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

Click the node “Billing Schedule” on the order.

Main Menu
Home
Exhibitors
Exhibitions
Proposals
Orders
Billing
Analysis
Setup
Logout

ORDER BILLING SCHEDULE

Order Explorer

- Order
- Exhibitor Information
- Line Items
- Contacts
- Billing Schedule**
- Forms
- Notes / Comments
- Order Confirmations
- Attachments
- Invoices & Pre-Payments
- G/L Summary
- History of Changes
- Go to CRM View
- Go to Exhibitor View

Billing Schedule

Order ID: 414
Exhibitor: Minnesota Twins
Division: Cards
Bill-to: Minnesota Twins
Exhibition: Dog Show 2022
Status: Quote 1

Order Amount: 440.00
Tax Amount: 0.00
Total Amount: 440.00
Amount Billed To-Date: 0.00
Amount Not-Yet-Billed: 440.00
Currency:

Billing Schedule Invoices

Billing Schedule Template:
Apply

Date	Value	Type	Comment	Space Amount	Service Amount	Total Amount	
1/20/2022	50.00	Percent of Total	50%	220.00	0.00	220.00	
3/31/2022	100.00	Percent of Remainder	Remainder	220.00	0.00	220.00	

Separate Service Invoices

Est. Invoice Date	Service ID	Service Description	Amount	Invoice ID	Actual Invoice Date
-- No Records Returned --					

Cancel
Save

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