

Booking Amendments

The purpose of these sections is to guide users through the correct process for amending bookings across all booking statuses, from **Planned** through to **Vendor Invoiced**.

It explains:

- Which **financial and non-financial amendments** are permitted at each booking status
- The **rules and restrictions** governing amendments
- The **required actions** to safely apply changes without breaking system integrity
- The correct procedures for **voiding bookings** in both MEplan and MEvision NAV
- An overview of the **Cost Greater Than Billing** scenario and the controls that apply

This ensures accurate financial control, correct system synchronisation, and compliance with audit and billing rules.

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Amendment Rules

General Rules

- **Non-financial changes** are permitted on all booking statuses, including:
 - Planned
 - Booked
 - Customer Invoiced
 - Vendor Invoiced
- **Financial changes** are only permitted when:
 - The booking is in **Planned** or **Booked** status, or
 - The amendment results in a **higher net value** than the existing booking.
- The system **does not allow financial changes** that would:
 - Reduce the net value on a booking that has already been invoiced
 - Modify locked bookings without first stepping the status back
- If a user attempts a prohibited change:
 - A system message will prevent the action from continuing
 - The booking must be stepped back to an editable status before proceeding

Non-Financial Changes

“ **Note:** Non-financial changes do not affect booking values or billing. These changes are allowed on **all booking statuses** and can be made directly in **MEplan**, with updates synchronising back to **MEvision**.

Permitted Non-Financial Amendments

Depending on the medium, the following changes are allowed across all statuses:

- Customer Order Number
- Contract Number (TV & OOH)
- Description
- Placement Instructions
- Target Market (Digital)
- Material (OOH)
- Language
- Ratings (TV - Target Market)
- Region / Market

Action Required:

Make the change in **MEplan** and refresh values in **MEvision**.

Financial Changes

“ **Note:** Financial changes are amendments that impact the value of a booking or placement.

Key Rules

- Financial changes can only be made in **MEplan** when bookings are in:
 - **Planned (Uncommitted)**
 - **Booked (Committed)**
- For **Customer Invoiced (Locked)** bookings:
 - The booking must first be stepped back to **Booked** status in **MEvision** using:
 - *Apply to Entries*
 - *Force Customer Financial Change*
 - Or full voiding and rebooking (see Voiding section)
- **For Vendor Invoiced (Locked) bookings:**
 - **The booking must first be stepped back to **Booked** status in **MEvision** using:**
 - *Apply to Entries*
 - *Force Customer Financial Change*
 - *Or full voiding and rebooking (see Voiding section)*

Rules Matrix Table - Planned & Booked

Amendment Type	Medium Type	Booking Status	Action Required
Rates - Parent Line	Traditional	<ul style="list-style-type: none">• Planned & Booked• Customer Invoiced	<ul style="list-style-type: none">• Amend directly in MEplan• Step bookings back to Booked status. Follow Booked/Planned steps thereafter.

Digital	<ul style="list-style-type: none"> • Planned • Booked • Customer Invoiced 	<p>Amend directly in MEplan *check flow with media orders</p> <ul style="list-style-type: none"> • Booking must first be removed from MEvision by: <ul style="list-style-type: none"> ◦ Autoing the booking, or ◦ Voiding the child line • Once uncommitted: <ul style="list-style-type: none"> ◦ Amend the parent line ◦ Reload or reschedule as required • Step bookings back to Booked status. Follow Booked/Planned steps thereafter. 	
Rates - Child Line	Traditional	<ul style="list-style-type: none"> • Planned & Booked • Customer Invoiced 	<ul style="list-style-type: none"> • Amend directly in MEplan • Step bookings back to Booked status. Follow Booked/Planned steps thereafter.

Digital	<ul style="list-style-type: none"> • Planned • Booked • Customer Invoiced 	<ul style="list-style-type: none"> • Update values in Goal or Rate Card view using the Planned column • Update values in Goal or Rate Card view using the Actual column • Step bookings back to Booked status. Follow Booked/Planned steps thereafter. 	
Time From / To & No Seconds (Parent line)	Traditional	<ul style="list-style-type: none"> • Planned & Booked • Customer Invoiced 	<ul style="list-style-type: none"> • Traditional media only • Amend directly in MEplan • Step bookings back to Booked status. Follow Booked/Planned steps thereafter.
Agency & Vendor Commission (MEvision)	Traditional	<ul style="list-style-type: none"> • Planned & Booked • Customer Invoiced 	<ul style="list-style-type: none"> • Recalculate plan line • Step bookings back to Booked status. Follow Booked/Planned steps thereafter.
	Digital	<ul style="list-style-type: none"> • Planned • Booked • Customer Invoiced 	<ul style="list-style-type: none"> • Recalculate plan line • *check booked • Step bookings back to Booked status. Follow Booked/Planned steps thereafter.

Discounts & Surcharges	Traditional & Digital	<ul style="list-style-type: none"> Planned & Booked Customer Invoiced 	<ul style="list-style-type: none"> Apply directly in MEplan Step bookings back to Booked status. Follow Booked/Planned steps thereafter.
Discount Groups	Traditional	<ul style="list-style-type: none"> Planned & Booked Customer Invoiced 	<ul style="list-style-type: none"> Add Discount Group code on parent line Step bookings back to Booked status. Follow Booked/Planned steps thereafter.
	Digital	<ul style="list-style-type: none"> Planned Booked Customer Invoiced 	<p>Amend directly in MEplan *check flow with media orders</p> <p>Booking must first be removed from MEvision by:</p> <ul style="list-style-type: none"> Autoing the booking, or Voiding the child line <p>Once uncommitted:</p> <ul style="list-style-type: none"> Amend the parent line Reload or reschedule as required <ul style="list-style-type: none"> Step bookings back to Booked status. Follow Booked/Planned steps thereafter.

Telmar Re-import		<ul style="list-style-type: none">• Planned • Booked • Customer Invoiced	<ul style="list-style-type: none">• Re-import csv file • Remove bookings/void• Re-import csv file • Step bookings back to Booked status. Follow Booked/Planned steps thereafter.
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