

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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Revision #13

Created 13 January 2026 18:32:17 by Holly

Updated 20 January 2026 18:58:34 by Holly