


Digital Media Scheduling

Digital Plan Lines

MEplan supports multiple digital calculation models, which are configurable within the system's configuration settings. The available visible calculable fields depend on the digital calculation model configured in the system. Calculation models support **inclusive and exclusive** setups where the non-media fees are either subtracted or added to the media costs. Other configurations such as **cost inclusive impute** and **split parent by month** when applied will effectively change the schedules' calculations and layout respectively.

Non-Media Plan Lines

It is recommended that all non-media fees are configured before creating media plan lines on a digital schedule. When navigating into a schedule, the user is presented with the available non-media tabs above the schedule.

1. To create a non-media fee, select the relevant tab (Ad Serving, Tech Serving, Management Fee, Brand Safety, AdOps) and capture the required information, including:
 - Medium Type
 - Description
 - Vendor
 - Any additional required fields
2. Select the **Save icon** () once the information has been completed.

Non-media totals are displayed on their respective tabs. Values are visible in both Planned and Actual states.

Non-Media Fee Rules and Behaviour

When configuring non-media fees, note the following:

- Non-media fees can be calculated as a **Rate, Percentage, or Flat** fee.
- Descriptions should be clear and meaningful, as they are referenced on related media lines.
- The **Vendor** represents the supplier rendering the service and receiving payment.
- Supported Buying Types include:
 - **Rate:** Requires a value in the *Rate* field
 - **Percentage:** Requires a value in the *Planned Percentage* field

- **Flat:** Requires a value in the *Rate* field
- **Servable Medium** defines the medium being served by the vendor.
- **Servable Vendor** defines the media vendor being served.
- Scheduling is always loaded using the vendor's currency.

The non-media tab reflects the **true non-media values**, while the media tab displays estimated deductions until full calculations are completed.

Non-media calculations consider all applicable non-media fees when determining final media spend and goals.

Media Plan Lines

1. To create a media plan line, navigate to the **Media** tab on the schedule and complete the relevant fields, such as:
 - Medium Type
 - Platform
 - Medium Unit
 - Buying Method
 - Budget and Rate values

If non-media fee setups exist, they will be available for selection on the media line. Depending on system configuration, these fees may be auto-selected or require manual selection by the user.

Media Fee Calculation Definitions

When scheduling digital media, the following values apply:

- **Budget Total:** Gross amount payable by the client, inclusive of agency commission and non-media fees
- **Budget Goal:** Quantity derived from the Budget Total (e.g. impressions, clicks)
- **Cost Less Agency Commission:** Budget Total minus agency commission configured in NAV
- **Goal Less Agency Commission:** Adjusted goal based on the reduced cost
- **Total Cost / Total Goal:** Final values after all deductions, representing the true media planning values

Scheduling is performed using the vendor's currency.

Plan Line Warnings for Negative Values: If the cumulative value of non-media fees exceeds the media line's Budget Total, a blue warning indicator will appear. This warning alerts the user to review and adjust the entered values before saving or continuing. Negative or unrealistic values indicate that the non-media configuration is not aligned with the selected

Non-Media Setups and Servable Buying Methods

This section outlines advanced non-media configurations and calculations used for brand safety, viewability, and third and fourth party services.

MEvision Buying Method Setup

Additional buying method configurations exist in MEvision to support non-media fees loaded as **Rate** buying types when linked to 1:1 ratio buying methods such as CPC, CPL, and CPE. The **Default Estimated Impressions** value must be configured on the Buying Methods table in MEvision.

Digital Non-Media Setups in MEvision

Non-media setups can be created on the Customer Card using the **3rd & 4th Party Servers** table.

Here, users can specify the **Servable Buying Method**. When the Buying Type is set to Rate, the default Buying Method configured in MEvision is available for selection.

Once configured in MEvision, non-media setups automatically appear in MEPlan within the relevant tabs.

Digital Non-Media Setups in MEplan

When creating non-media setups directly in MEplan, the **Servable Buying Method** column becomes available when the Buying Type is set to Rate. The selectable buying method defaults to the configuration defined in NAV.

Creating Media Lines with Estimated Impressions

When creating media lines using 1:1 ratio buying methods (e.g. CPC, CPE), the **Estimated Impressions** field becomes editable.

Entering **Estimated Impressions** creates an additional Buying Method linked to the default Estimated Impressions Buying Method and recalculates accordingly.

Linking a Non-Media line with the default Buying Method (CPM) specified to a Media line where Estimated Impressions is filled in, results in calculating the Non-Media value off the estimated impressions.

For example: If you have a Non-Media line set up with a Rate of 0.1 and link it to the Media line with Estimated Impressions of 100 000. The Calculation will be the **Rate of 0.1 divided by 1000 and then multiplied by the number of impressions.**

Calculation: Rate (0.1 per 1000) $0.1 / 1000 \times 100\ 000$ (No. Impressions) = R10

Removing or zeroing Estimated Impressions reverses this behaviour and recalculates non-media values to zero.

Linking a Non-Media line with the default Buying Method specified to a media line where estimated impressions is **not filled in**, results in a **zero** Non-Media value for the linked Non-Media.

If the **Estimated Impressions** are zeroed out on the Media line, the additional **Buying Method** will be deleted off of the **Buying Methods** table and adding the **Estimated Impressions** on the media line after it was saved, creates the additional buying method and re-calculates the Non-media calculations dependant on estimated impressions.

Creating an additional Buying Method line for the default Estimated Impressions Buying Method updates the media parent line with the Estimated Impressions and calculates all Non-Media with the newly calculated values.

Deleting the additional Buying Method line with the default buying Method, clears the Estimated impressions on the media line and Re-calculates all associated Non-Media to that line.

Media Child Lines

Estimated impressions for the child lines are split based on the Total Goal of the Additional Buying Method matching the default Estimated Impression buying Method. The split also adheres to the number of days per month.

The **Estimated Impressions View Type** is **not editable**. Modifying the Planned Goal / Rate of the Media Child, adjusts the estimated impressions accordingly and proportionality. The total Planned Estimated Impressions will sum to the 'Total Goal' of the additional buying method the calculation is based off of.

Capturing an **Actual** on the Media child line will **calculate the remaining child lines projected actuals** as a ratio of the planned values. The related Non-Media should also calculate accordingly.

Non-Media Child Lines

Non-media child line values are calculated using the estimated impressions of linked media child lines and the parent non-media rate.

Non-Media child lines of type **Rate with a Buying Method specified** has its child values calculated based off the **Estimated Impressions** of the Media Child lines its linked to and the Rate of the parent of the Non-Media parent. The rate is the rate per 1000 (Rate based on base qty of the buying method).

For example, if you take **3369 impressions** from the Media child line and **multiply** that by the **Rate of the Non-Media Parent** and then **divide by 1000** the total will be a value of **0.3369 rounded to 0.34** for that particular Non-Media child.

Actualised non-media values remain locked and are not affected by subsequent media changes.

A warning will appear on the Non-Media child if one of the Media lines has zero impressions

Media parent lines cannot be modified once linked non-media lines are committed

Scheduling with Phases and Monthly Splits

Phases

Campaign phases can be configured in the **System Configurations** table and selected on the schedule header using the **Planning Phase** field. Each phase may have its own schedule header and date range.

Split Parent by Month

When enabled on the Customer Card, plan lines automatically split by month for the duration of the schedule. This setting can be enabled or disabled via the plan's configuration settings.

Exporting Digital Schedules with Phases

Digital schedules can be exported by selecting the required schedule headers and choosing **Schedule Export**. Exports are consolidated by phase and ordered according to the system configuration.

Mandatory Fields and Validation

Below is a list of the fields that exist and where they are mapped to in the system. The type of field (Free Text/Look up) is also identified as well as the associated calculation should it be a calculated field.

Mandatory fields are defined by layout configuration and highlighted in red. If required fields are missing, the system displays a warning upon saving.

Certain fields such as **Start and End Dates** populate automatically based on the schedule's dates as well as **Campaign Objective and Target Market** if populated on plan creation.

Estimated Impressions **automatically populates if the CPM buying method is used** and is free text if any other buying method is used. This field is also **mandatory depending on the medium type** which is a configuration done on the Medium Type card in MEvision.

Field Name	Free Text Field	Lookup Field	Mandatory	Additional Notes
Vendor		✓	✓	
Platform	✓			
Target Market				- Can be populated from the plan
Detailed Target Market	✓			
Geography	✓			
Campaign Objective	✓			- Can be populated from the plan
Creative Detail (Format)	✓			
Placement (Medium Unit)		✓	✓	
Start & End Dates			✓	- Adopt the dates of the schedule header
Buying Method/Type		✓	✓	
Budget Total Cost			✓	- Cannot be zero - Inclusive Config Calc = Media + Non-media fees, incl. Agency comm. - Exclusive Config Calc = Media fees only

Total Cost			✓	- Net Media excl. Non-media fees. - Inclusive Config Calc = Budget Total Cost – Agency Comm – Total Non-media fees
Frequency	✓			
Estimated Impressions	If CPM is not used		Depends on Medium Type	
Reach			All mediums except Search	- Calc = No of Impressions / Frequency
CPM (Rate/Unit)			✓	- Rate is captured and calculates the Quantity (Goal / KPI) - No. of impressions is calculated if buying method is CPM. Other buying methods must be manually filled in
CTR	✓			- Value = %
Total Goal (Clicks)			✓	- If buying method is CPC then goal = clicks - Rate is captured and Quantity is calculated (Goal / KPI)
CPC (Rate/Unit)			✓	- Rate is captured and Quantity is calculated (Goal / KPI)
ETR/VTR (Budget Goal)	✓			- Value = % - Appears on additional buying methods table

Engagements/Video Views (Budget Goal)			✓	<ul style="list-style-type: none"> - If buying method is CPE then goal = Engagements - If buying method is CPV then goal = Views - Rate is captured and Quantity is calculated (Goal / KPI) - Number for impressions must be manually filled in if required
CPE/CPV (Rate/Unit)			✓	<ul style="list-style-type: none"> - Rate is captured and Quantity is calculated (Goal / KPI) - Number of impressions is calculated if buying method is CPM - All other buying methods must be manually filled in

Media Scheduling Calculations and Rules

This section outlines the MEvision configurations that control how media calculations are applied in MEplan, with a specific focus on the **Impressions Mandatory** setting and its impact on Estimated Impressions, Reach, and Buying Method behaviour.

MEvision Setups

An **Impressions Mandatory** checkbox is available on the Medium Type card in MEvision. This configuration determines whether Estimated Impressions and Reach must be captured when scheduling media.

All Medium Types require **Impressions Mandatory** to be enabled, with the exception of **Search**.

Estimated Impressions – Mandatory Logic

When **Search** is selected as the Medium Type:

- Estimated Impressions default to zero and are not mandatory.
- Reach will therefore also be zero.

For all other Medium Types where **Impressions Mandatory** is set to true:

- Estimated Impressions are mandatory, even if they are not system-calculated.
- Once Estimated Impressions are manually entered, Reach will calculate automatically.

Estimated Impressions and Reach by Buying Method

When **CPM** is selected as the Buying Method:

- Estimated Impressions and Reach are calculated automatically.
- The Rate is entered manually and used to calculate the Quantity (Goal / KPI).

When any other Buying Method is selected (CPC, CPV, CPE, CPI, CPL):

- Estimated Impressions and Reach do not calculate automatically.
- Estimated Impressions must be entered manually.
- Once Estimated Impressions are provided, Reach will calculate automatically.
- These fields remain mandatory due to the NAV configuration described above.

Reach Calculation

Reach is calculated using the following formula:

Reach = Number of Impressions ÷ Frequency

Buying Methods Table and Rules

Buying Methods Table

The following Buying Methods are supported in both MEvision and MEplan:

- Other
- Flat Fee
- Cost Per Click (CPC)
- Cost Per Mille/Thousand (CPM)
- Cost Per Engagement (CPE)
- Cost Per View (CPV)
- Cost Per Lead (CPL)
- Cost Per Acquisition (CPA)
- Cost Per Installation (CPI)

Buying Method Rules

CPE and CPV Mutual Exclusivity

CPE and CPV are mutually exclusive as primary Buying Methods:

- If **CPV** is selected as the primary Buying Method on the parent line, **CPE** cannot be added as an additional Buying Method.

- If **CPE** is selected as the primary Buying Method on the parent line, **CPV** cannot be added as an additional Buying Method.

CPA, CPI, and CPL Mutual Exclusivity

The following exclusivity rules apply:

- If **CPL** is the primary Buying Method, **CPA** and **CPI** cannot be added.
- If **CPA** is the primary Buying Method, **CPI** and **CPL** cannot be added.
- If **CPI** is the primary Buying Method, **CPL** and **CPA** cannot be added.

Non-Media and Scheduling

Non-Media setup and scheduling behaviour remain unchanged. The system supports the following Non-Media types:

- Ad Serving
- Tech Serving
- Management Fees
- Brand Safety
- AdOps

The following Buying Types are supported for Non-Media fees:

- Flat
- Percentage
- Rate

MEvision Non-Media Setups

“ **Important:** All Non-Media setups must be completed in MEvision prior to creating a digital schedule (campaign) in MEplan in order for the configurations to come through when scheduling.

Agency Commission

Agency Commission is configured in MEvision at Brand level:

1. Navigate to the **Customer Card**.
2. Select the relevant **Brand**.
3. Open **Brand Coordination** from the Navigate tab.
4. Set the Coordination Type to **Agency Com**.
5. Enter the **Commission Percentage** and **Inception Date**.
6. Optionally set an **Expiry Date**.

If the **Medium Type** field is left blank, the Agency Commission applies to all media, including Ad Serving, Tech Serving, and Management Fees.

Third and Fourth-Party Servers

To automatically show Ad Serving, Tech Serving, and other related fees in MEplan:

1. Navigate to the **Customer Card** in MEvision.
2. Select **3rd and 4th Party Servers** from the Navigate ribbon.
3. Configure the Non-media fee records as required.

General Setup Rules and Variations

- If no **Brand** is specified, the fee applies to all brands for the customer.
- **Serving Medium** and **Serving Medium Unit** must be specified.
- **Serving Vendor** (the vendor providing the service) must be selected.
- **Servable Medium** (e.g. Social, Search) is optional; if left blank, the setup applies to all Medium Types.
- An **Inception Date** is mandatory; plan lines must fall within the active date range.
- Fees can be entered as either an **Amount** or **Percentage**, or completed in MEPlan.

If an Ad or Tech Serving vendor is not linked to the Ad/Tech Serving Master Medium Type Code, it will not be selectable in the Serving Vendor lookup.

MEvision-based setups are automatically defaulted onto media lines in MEplan when the setup parameters are met. Where multiple valid setups exist, MEplan selects the most relevant configuration based on defined parameters.

“ Example 1:

An Ad Serving setup is created with **Search** specified as the Servable Medium. When a Search media line is scheduled in MEplan, the corresponding Ad Serving fee is applied automatically.

Example 2:

An Ad Serving setup is created with **Search** as the Servable Medium and a specific **Vendor**. When a Search media line is created in MEPlan using that vendor, the correct Ad Serving fee is automatically linked.

Management Fees

Management Fees are configured in the **3rd and 4th Party Servers** table in MEvision.

Important: To create a Management Fee, the associated Medium Type must be flagged as **Is Management Fee** on the Medium Type Card (General tab). The Management Fee vendor must be linked to the same Medium Type on the Vendor Card.

Management Fee setups require:

- Serving Medium
- Serving Medium Unit
- Serving Vendor
- Amount or Percentage

If the Serving Medium is left blank, the Management Fee applies to all media in the schedule. Alternatively, it can be restricted to specific Medium Types.

Once all MEvision configurations are completed, they automatically integrate into MEplan. When a new digital schedule is created, all applicable Non-Media setups appear in the relevant Non-Media tabs on the schedule.

Planning and Actualisation

Planning and actualisation control how digital plan values are distributed over time and committed to MEvision. This process ensures that planned values, actual spend, and goals remain aligned across MEPlan and NAV throughout the campaign lifecycle.

Monthly Planning

Once parent plan lines are saved, MEplan automatically distributes the planned values proportionately across the associated months based on the number of days in each month.

The planning process then continues at child line level, where the user can manually **edit** (✎) monthly child lines to allocate planned budgets, impressions, or goals per month.

1. Select the **edit icon** (✎) on the right-hand side of the relevant line to enter values into the **Planned** column.
2. Select the **save icon** (🔒) on the right of the line once planning is complete.

During planning:

- **Planned** column values are editable on each monthly child line
- Totals across all months always reconcile back to the parent line
- Any redistribution maintains proportional accuracy unless manually overridden

The **Actual** values initially mirror the Planned values. The final month automatically holds any remaining balance to ensure that the total planned budget or goal exactly matches the parent line totals.

Actualisation

“ **Note:** Actualisation can only take place when bookings are in a booked status.

Actualisation occurs when a user begins updating values in the **Actual** column.

1. To actualise values, the user must be viewing the schedule in either:
 - **Goal** view, or
 - **Rate Card** view
2. Select the **edit icon** (✎) on the right-hand side of the relevant line to enter values into the **Actual** column.
3. Select the **save icon** (💾) on the right of the line once actualising is complete.

When actual values are entered, remaining uncommitted months redistribute proportionately based on what has already been actualised.

Redistribution recalculates remaining months as closely as possible to the original planned split.

Any change to an actualised value immediately triggers synchronisation with MEvision and the Media Order respectively.

“ **Note:** For more detailed information on booking statuses and symbols refer to <https://kb.it-s.co.za/books/bookings/page/scheduling-bookings>

Voiding

To void a booking that has a Media Order linked to it:

1. Change the booking value to **0** when in view type **Rate Card or Goal**.
2. Once voided, the booking can be set back to **Auto** when the child line is in the editable state and selecting the **down arrow symbol** (▼) of the child line, returning it to an uncommitted state.

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