





Scheduling Bookings

Creating Schedule Plan Lines

1. To manually create a plan line within a schedule, select the schedule's **options menu** () and choose **Create Plan Line**.
2. Complete the required fields, such as:
 - Media Owner
 - Medium Unit
 - Spot Kind
 - Rate Per Unit
 - Any additional required fields (These will differ according to the medium)
3. Once all details have been entered, select the **Save icon** () to create the plan line.
4. Bookings can be scheduled in **Day View** by switching the layout to **Day** and entering the required number of bookings or spots directly against the date on the right hand side of the plan line.

Copying Plan Lines

1. Individual plan lines can be copied by selecting the planline's **options menu** () on the line and choosing **Copy Plan Line**.
2. Once copied, the line can be edited as required. If the Medium Type is changed, the Vendor and Medium Unit fields will clear and must be reselected. The word *Copy* will be appended to the description and should be updated accordingly.
3. For bulk copying, users may select multiple lines using the checkboxes and choose **Copy Selected** from the schedule's **options menu** ().

Copied lines will populate in the schedule and billing totals will update automatically.

The schedule's Totals display:

- Plan Budget
- Planned Budget (Digital)
- Plan Billing
- Schedule Billing
- Remaining Planned Budget (Digital)
- Remaining Plan Budget

Calendar Scheduling

1. Bookings can be scheduled directly within the calendar panel which shows both **Add** and **Subtract** options on the pop-up.
2. Select the corresponding cell on the right-hand side of the plan line to open the calendar scheduler.

The following scheduling options are available:

- Select a specific **day** to enter the number of spots or bookings for that date
- Select a **day of the week** to replicate bookings across the same weekday for the entire month
- Select a **week number** to apply bookings across the full week

Copying Bookings

In **Calendar Scheduler**, bookings can be copied by week or by month.

1. To copy bookings, select the copy icon located in the top-left corner of the selected area and choose **Copy**.
2. Navigate to the destination month and select **Paste**. Once the bookings have been applied, select **Save All** to confirm the changes.

Booking Deals

Booking Deals define the financial structure of a booking and are accessible in both Month and Day views.

Once plan lines have been scheduled:

1. In **Month View**, left-click on a booking value to open the calendar scheduler, or right-click on the booking value and select **Booking Deals**.
2. In **Day View**, right-click on a scheduled date and select **Booking Deals**.







The Booking Deal screen displays the financial calculations associated with the booking. These calculations can be reviewed on screen or exported to Excel.

Fields marked with a **pencil icon** (✎) are editable. Any changes made to booking deals will automatically synchronise back to NAV.

Booking Status Symbols and Functions



Note: More detailed information on booking statuses and rules are outlined in Book named **Booking Statuses and Rules**

Status Type	Symbol	Additional Information
Planned (Traditional) Planned (Digital)	 	- All bookings start with the circular arrow and are in an uncommitted planned state - In Digital scheduling, manually planned bookings are shown with a pencil icon
Booked	 	- An information icon appears on the booking - The Media Order number is displayed for reference when the icon is hovered over - Committed booked bookings are represented with a tick
Customer Invoiced		-The booking is locked in MEplan and cannot be edited
Vendor Invoiced		-The booking is locked in MEplan and cannot be edited
Void	N/A	- Voiding is not represented by a symbol but rather the removal of the booked symbol - In Digital voiding , the committed tick symbol remains and the booking can be autoed in order to revert to an uncommitted planned status

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 value **will no longer exist** on the child line.

Revision #14

Created 17 December 2025 18:23:33 by Holly

Updated 16 January 2026 14:58:58 by Holly