Plans

This section outlines the **full lifecycle of a plan** within MEplan. It explains how to **create a new plan**, including campaign details, currency deals and budgets. It also covers how existing plans can be **modified, copied or deleted.**

Plan Creation

Creating a New Plan

A user can create a new plan from multiple entry points within MEplan:

1. Selecting the **blue plus icon (+)** from the dashboard
2. Navigating to **Plan > Create New Plan** from the left-hand menu
3. Creating a plan directly from the plan list page

Once initiated, the user must capture all relevant campaign information, including Company, Campaign Name, Start and End Dates, Customer (Client), Brand, and any other required details. Select **Next** to proceed through the setup steps.

Currency Deals

A currency deal is required when the Vendor (Publisher/Supplier) and/or the Client (Customer) operates in a currency different from the local currency.

A fixed currency deal can be created and applied for the full duration of the campaign contract. When creating a currency deal, both selling and buying currencies can be defined. These currencies synchronise back to MEvision as a single currency deal. The local currency (LCY) does not need to be loaded into MEplan.

- **Selling Currency (SCY):** The currency billed to the Client by the agency/company.
- **Buying Currency (BCY):** The currency paid to the Vendor by the agency/company.

If a currency deal is required:

1. Select the relevant currency from the **Currency** drop-down list and specify the exchange rate. The currency deal will automatically inherit the campaign's start and end dates.
2. Once saved**( )**
3. Select **Next** to continue.

Additional currency deals can be added by selecting **Add Currency Deal**.

If the campaign uses only the local currency, no currency deal is required and the user can select **Next** to continue.

> **Note:**
> When scheduling using a Vendor currency that has not been set up such as a third party coordination vendor which holds a different currency, a system message will appear: "Please note that no currency deal has been selected for this line, are you sure you want to continue?". If **Yes** is selected, the system will not use the customer currency defined on the plan for exchange rate conversion. If a new Vendor currency is required, it must be added as an additional line item on the currency deal. The currency deal code will only be available on new plan lines once the currency deal includes the Vendor’s currency code. If additional in-currency Vendors are not configured, the currency deal will be considered invalid and both Customer and Vendor conversions will default to the MEvision exchange rate table.

Responsible Person and Plan Details

1. Select the **MEvision Responsible Person** by typing the first letters of the name and selecting the correct user from the search results.
2. Select **Next** to proceed.
3. Capture the remaining plan details, including Campaign Objectives, Target Market, Market, and Budget.
4. Select **Next** to confirm the information.

Budget Breakdown (Optional)

If multiple media types are included in a single plan, the budget can be broken down by medium.

1. Select the **Master Medium**, **Medium Type**, enter the budget value, and save the line.
2. Select **Preview Plan** to review all captured information.
3. Once confirmed, select **Create Plan** to finalise the plan.

Copying a Plan

MEplan allows users to copy an entire plan to streamline campaign setup.

1. Navigate to the plan list, select the **black options menu (⋮)** next to the relevant plan.
2. Choose **Copy Plan**.

A pop-up window will appear where the brand and product (if available) can be selected or changed. Once confirmed, the system will create a new plan based on the selected brand and the structure of the original plan.

Plan Modifications

Plan Details

1. An existing plan can be edited by selecting the **plan's options menu ( )** on the plan.
2. Choose **Edit Plan.**
3. The user may update the campaign name, date range, objectives, target market, and other plan details.An option is available to update schedules and schedule lines automatically by selecting the relevant checkbox.

If the plan date range changes and no bookings have been committed to MEvision, the date range can also be updated on the schedules (plan view) and on the schedule lines (schedule view).

Plan Brand Management

User Setup

To allow a user to change a customer's brand on a plan, the **Allow Brand Change** option must be enabled on the User Card within security setup.

Rules: Brand Changes and Plan Line Status

- Brand changes are permitted when plan lines are in a **Planned** or **Booked** status.
- Brand changes are not allowed once plan lines are locked, such as when they have been **Customer Invoiced** or **Vendor Invoiced**.

Changing the Brand on a Plan with a Brand Already Specified

If a brand was assigned during **plan creation and schedules already exist:**

1. Open the **plan's options menu ( )** and select **Change Brand**.
2. A pop-up window will appear allowing the selection of a new brand and product (if applicable).
3. Select **Proceed** to confirm.

Once completed, the plan and all associated schedules will adopt the new brand and the related brand coordination defined in MEvision.

Changing the Brand on a Plan without a Brand Specified

If **no brand was specified at plan creation** and the brand was later applied at schedule level:

1. Open the schedule's **options menu (⋮)** and select **Change Brand**.

2. Select the required brand and product (if available), then select **Proceed.**

The plan and schedules will update accordingly based on the MEvision brand configuration.

Multiple brands may be assigned per medium type, resulting in a separate campaign number for each brand.

Changing the Brand When Copying a Plan

To change a brand when copying a plan:

1. Navigate to the plan list and select the **options menu (⋮)** for the plan to be copied.
2. Choose **Copy Plan**.
3. A pop-up window will appear where a new brand and product (if available) can be selected.
4. Select **Proceed** to create the copied plan using the chosen brand.

Changing the Brand When Copying a Schedule

Brand Specified on Plan Creation

If a plan **has a brand specified at creation**, copied schedules will automatically inherit the plan’s current brand. From the plan view:

1. Open the schedule list **options menu (⋮).**
2. Select **Copy Schedules**.
3. Select the customer brand and associated plan, then choose **Filter Schedules** to display available schedule lines.
4. Select the required schedule line(s) and choose **Copy with Schedules**.

The copied schedules will appear in the plan using the plan’s brand.

Brand Not Specified on Plan Creation

If **no brand was specified when the plan was created**, copied schedules will retain their original brand.

1. Follow the same **Copy Schedules** process.

The copied schedules will appear in the plan with their existing brand unchanged.

Plan Deletion

A plan can be deleted from the plan view by:

1. Selecting the **plan's options menu ( )** in the top-right corner.
2. Choosing **Delete Plan**.

> **Note:** A plan cannot be deleted unless all plan lines and schedule headers associated with the plan have first been deleted.