# 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.

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