


# 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.

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