

Schedules

This section explains how schedules are created, edited, copied, and deleted within MEplan. It outlines how schedules relate to plans, how booking details are managed, and the system rules that apply when maintaining schedule data.

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Creating Schedules

Once a plan has been created, a blank schedule automatically opens in the plan view.

1. The user must complete the required schedule header information, including:
 - Brand
 - Master Medium Type
 - Medium Type
 - Division Code
 - Any additional required fields
2. Once all relevant information has been captured, select the **Save icon (📁)** to create the schedule.
3. After saving, the **Description** field becomes a hyperlink. Selecting this link will open the schedule, allowing the user to plan bookings or slots within the schedule.
4. A schedule can also be accessed by selecting the **options menu (⋮)** on the schedule line and choosing **View Schedule**.

Copying Schedules

MEplan allows users to copy schedules from an existing plan into a newly created plan to streamline campaign setup.

“ Before copying schedules, a new plan must be created using the same key parameters as the source plan, including Customer, Brand, and Date Range.



From the new plan:

1. Open the schedule list **options menu** (ⓘ).
2. Select **Copy Schedules**.
3. In the plan lookup window, select the plan from which schedules should be copied.
4. The Brand can be updated if required. Any brand-specific financial rules will be inherited from the selected brand.
5. After selecting the source plan, choose **Filter Schedules** to display the available schedules.
6. Select the checkbox next to the schedule(s) to be copied. Within the **Schedule Management** section, the user can choose additional copy options:
 - **Ratings:** Copies plan line ratings (applicable to Television)
 - **Discounts:** Copies plan line discounts
 - **Purchase Order:** Copies the customer purchase order number
7. Selecting **Copy** will copy only the schedule header. Selecting **Copy with Schedules** will copy both the schedule header and all associated plan lines.
8. Once completed, the newly copied schedule will appear on the destination plan.

“ **Note:** The Customer field is disabled (greyed out) as only plans linked to the same customer are available for selection.

Schedule Modifications

To edit a schedule header:

1. Select the **options menu** () located on the right-hand side of the schedule line
2. Choose **Edit Schedule**.
3. The user may update schedule details such as the Customer Purchase Order number, dates, or other editable fields.
4. Once changes are complete, select the **Save icon** () to apply the updates.

Deleting Schedules

“ Before a schedule can be deleted, all associated plan lines and bookings linked to that schedule must be removed.

Once these dependencies have been cleared, the schedule header can be deleted by:

1. Selecting the schedule line **options menu (⋮)** on the schedule
2. Choosing **Delete Schedule**.