BrandMaker

# Marketing Planner

## User Manual

Version 7.0

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# 1 The BrandMaker Marketing Planner

The BrandMaker Marketing Planner is the module within the Marketing Efficiency Cloud for planning measures and campaigns, budgeting, and KPI management. It serves as a central platform for all participants and as the starting point for the operative implementation of the planned measures. You can use it to plan and budget your marketing measures, specify key figures for performance evaluation, and make all of your data available centrally.

You benefit from:

- Transparent marketing measures and costs
- Information about each element, such as content, media, goals, and tasks
- Automatic calculation of budget totals
- Graphic reports on budget allocations, target and actual comparisons, measures, and performance measurements

# 2 Getting to know the Marketing Planner

## 2.1 Dashboard

Like a dashboard in a car, the *Dashboard* displays important information about the individual marketing measures. To call the dashboard, click > *Dashboard*. The dashboard consists of the following areas, which are called dashlets.

**Note:** Note that the order of the dashlets and the dashlet displays may be different from the screenshots displayed here. For information about changing the display of the dashboard and dashlets, see the chapter *Modifying the dashboard* on page *15*.

### My Tasks

This displays the tasks to which you are assigned that are not completed yet. You can filter tasks based on their status by activating or deactivating the checkboxes above the table.

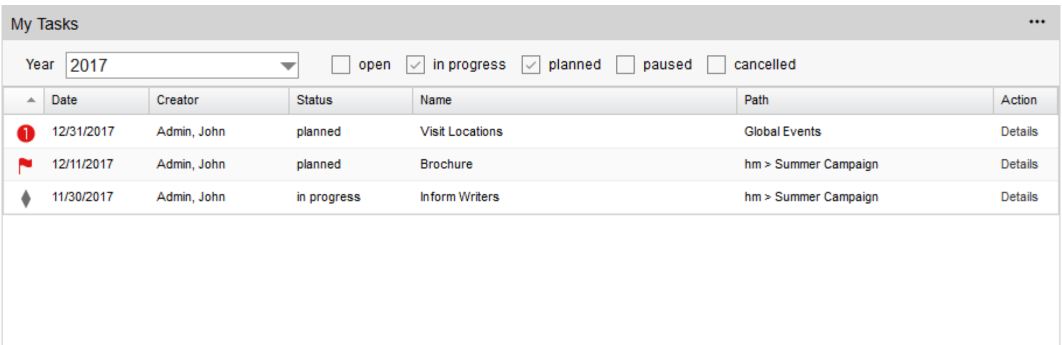
**Note**

Jobs are displayed as *Open* until they are completed.

The table shows the following data:

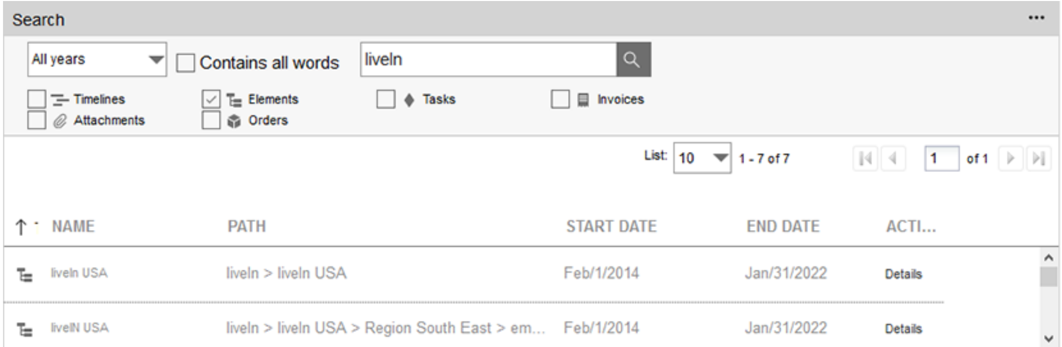
- The date on which the task is to be completed
- The person that created the task
- Task status
- Name of the task
- Path to the corresponding element
- Notes

Click *Details* to open the *Edit task* dialog box and the detailed view of the element on the *Tasks* tab. You can use the *Timeline* filter above the table to limit the view to tasks from specific years. Click to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.



## Search

You can search for various objects such as elements, timelines, or attachments. If you enter multiple search words, use the checkbox to choose whether the results have to include all of the search words. Click *Details* to open the detailed view of a search hit. For all of the objects, the detailed view opens on the corresponding tab. For timelines, tasks, invoices, and POs, the corresponding editing dialog box also opens. The results are paginated if not all hits can be displayed. Click to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.




## Current Measures

This dashlet displays all the elements for which timelines are planned and/or taking place during the next 14 days. You can use the drop-down list above the table to display the timelines assigned to you or all timelines which are visible to you.

The table shows the following data:

- The timeline category
- Timeline name
- Start and end date

Click *Details* to open the *Edit timeline* dialog box and the detailed view of the element on the *Timelines* tab. Click to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.

### KPI Evaluation

The dashlet displays *measurement*-type KPIs with an evaluation that is overdue or that must be carried out within five days at the latest. Only the KPIs of elements that you can access are displayed. The table shows the following data:

- : The KPI evaluation is overdue.
  : The KPI must be evaluated within five days at the latest.
- The corresponding element
- KPI name
- Due date

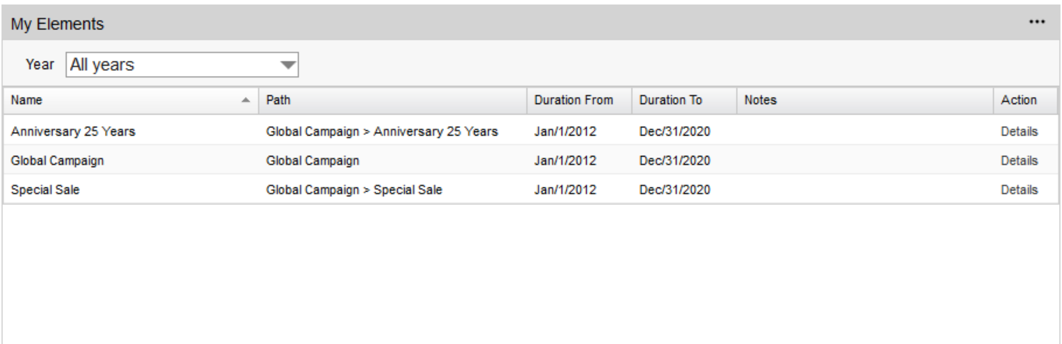
Choose *Details* to open the *Edit KPI* dialog box and open the detailed view of the element on the *KPIs* tab. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.


### My elements

This dashlet displays the elements for which you are responsible. The table lists the following data:

- Element name
- The path to the element in the calendar view
- Timespan (from/to)
- Any entered notes

Click *Details* to open the detailed view of the element on the *General* tab. You can use the *Timeline* filter above the table to limit the view to elements from specific years. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.

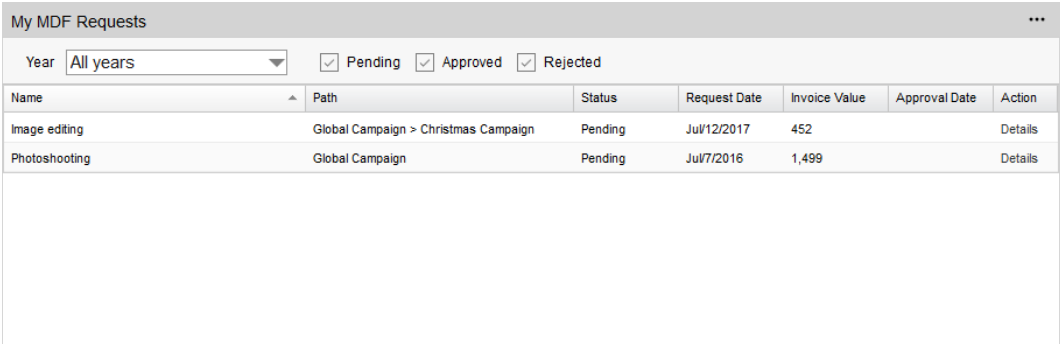


### My MDF requests

The dashlet displays the MDF requests that you have provided. The table shows the following data:

- Name
- The path to the element in the calendar view
- Status
- Requested data
- Invoiced amount
- Approval date

Click *Details* to open the *Edit MDF* dialog box and the detailed view of the element on the *MDF* tab. You can use the filters above the table to limit the view to requests with a specific status or a specific timeline. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.



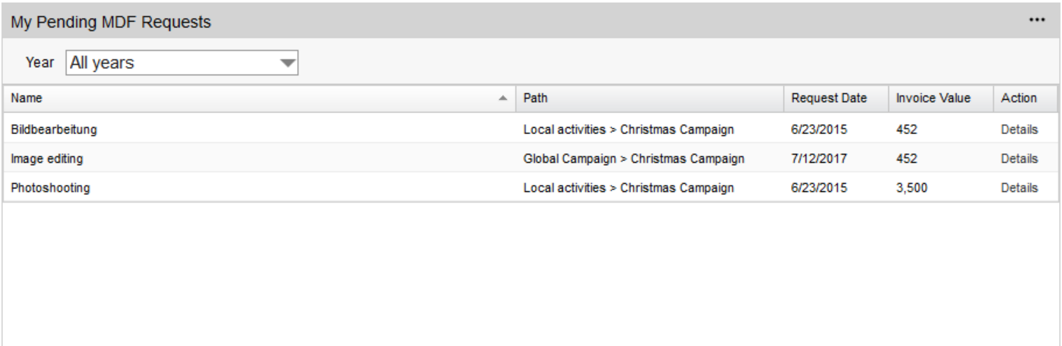
### My pending MDF requests

> **Note**: Note that you can only see this dashlet if you have been entered as an approver (see the chapter *Entering a user as an approver* on page 42).

The dashlet displays the MDF requests that you have to process. The table lists the following data:

- Name
- The path to the element in the calendar view
- Requested data
- Invoiced amount
- Action

Click *Details* to open the *Approve MDF* dialog box and the detailed view of the element on the *MDF* tab. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.




| Name | Path | Request Date | Invoice Value | Action |
|---|---|---|---|---|
| Bildbearbeitung | Local activities > Christmas Campaign | 6/23/2015 | 452 | Details |
| Image editing | Global Campaign > Christmas Campaign | 7/12/2017 | 452 | Details |
| Photoshooting | Local activities > Christmas Campaign | 6/23/2015 | 3,500 | Details |

### My watched Elements

The dashlet lists the planning elements watched by you. How to activate the watching of an element is explained in chapter 4.1.10.
The table lists the watched elements with *Name*, *Path* and *Duration from/to*. Click *Details* to open the detailed view of the element. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on page 14 for more information.


| ↑ NAME | PATH | DURATION ... | DURATION ... | ACTI... |
|---|---|---|---|---|
| Summer Campaign | liveIN > Summer Campaign | Jun/1/2011 | May/31/2020 | Details |

### 2.1.1 Search dashlet

You want to use the *Search* dashlet to find timelines, tasks, attachments, individual planning elements of the tree structure, invoices or cost estimates in your marketing plan quickly and easily.

**Step by step:**

1. In the upper navigation, choose > *Dashboard*.
2. Enter one or more search words in the dashlet search input field.
3. If you have entered multiple search words, choose whether the result has to include all of the search words or only one of them.
4. Activate the checkboxes for the objects for which you want to search:

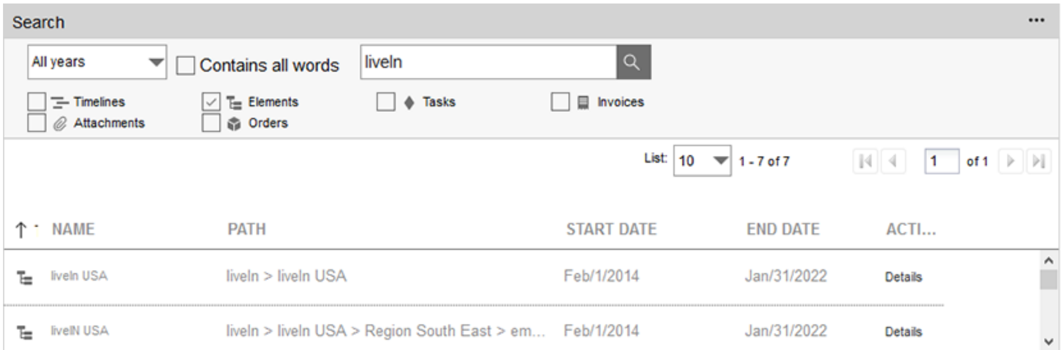
- *Attachments*: You can search for the full name of a file attachment (including the file type).
- *Tasks*: You can search for the *name* of a task or a job.
- *POs*: You can search the POs that are created for the elements. The fields for the *name*, *value*, *cost type*, *cost center*, *supplier, order number*, *comment*, *responsible person*, and *reference number* are searched.
- *Elements*: This searches in the fields for the *name*, *external ID*, and *element ID* and the *comments* of the planning elements.
- *Invoices*: This searches the invoices that are entered for the elements. The fields for the *name*, *amount*, *cost center*, *notes*, *comments*, *responsible person*, *cost type*, *invoice number*, *reference number*, and *order number* are searched.
- *Timelines*: You can search for timelines using the names or the categories.

5. From the *Period* dropdown list, choose:

- one year in order to search only its corresponding marketing plan,
- the entry *All years* to search through all of the marketing plans that have been created.

6. Choose *Search*.

The search results are listed in a table. Click *Details* to open the detailed view for the object that is found.



### 2.1.2 Dashlet menu

When you click ··· on a dashlet, the dashlet menu opens.

- *Update content*: this updates the dashlet display.
- *Export as PDF*: this exports the displayed elements of the dashlet to a PDF file.
- *Export as Excel*: this exports the displayed elements of the dashlet to an Excel file.
- *Dashlet color*: this changes the colour of the title bar. Select one of the displayed colors to do so.

### 2.1.3 Adapt

Each user can adjust the display of the dashboard and dashlets to their own requirements. The settings are saved for each user and can be adjusted again at any time.

**Dashboard columns**

You can use a drop-down list in the bottom section of the dashboard to choose whether the dashlets should be arranged in one or two columns.

**Height of the dashlets**

You can also use the dropdown list in the lower area of the dashboard to set the size of the dashlet display. The small dashlet size is set by default. The middle size is 1.5 times and the large size is twice the size of the small dashlet size.

**Dashlet arrangement**

You can change the arrangement of the dashlets on the dashboard. Move the mouse over the upper pane of a dashlet. When a cross icon appears, hold down the left mouse button and move the cursor to the position of a different dashlet. The second dashlet is displayed in gray. When you release the left mouse button, the dashlets swap their positions.

**Colour of the title bar**

Click ··· to open the dashlet menu. Choose one of the colors to change the appearance of the title bar.

**Dashlet tables**

You have the following options for adjusting the display of the dashlets:

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.

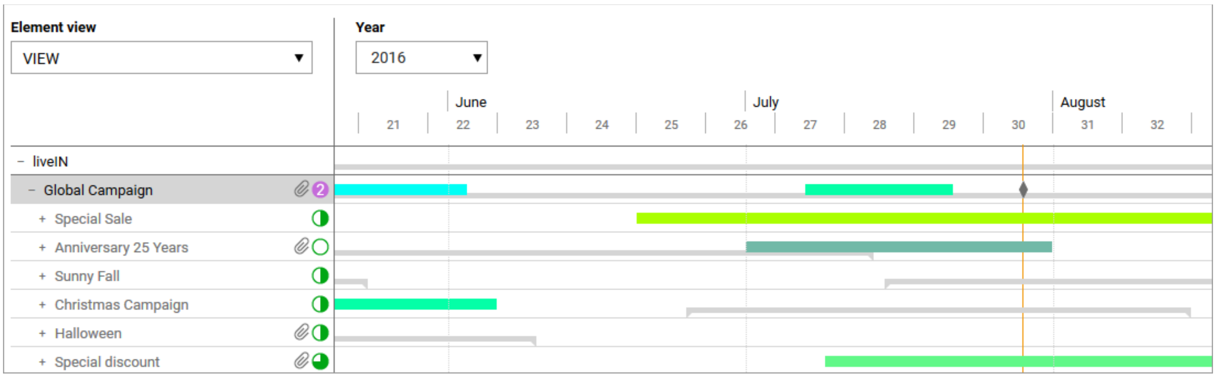
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

**Reset**

You can also reset the appearance of the dashboard. This changes the columns in the dashboard, the arrangement and size of the dashlets, and the colors of the title bars. To reset the appearance of the dashboard, choose *Reset to factory settings* in the dropdown list in the bottom section of the dashboard. This function will undo all of your changes. This also applies to the selection of a year on the dashlets, the activation state of the checkboxes, as well as the size, sequence and displaying or hiding of table columns. Entered search words will also be erased.

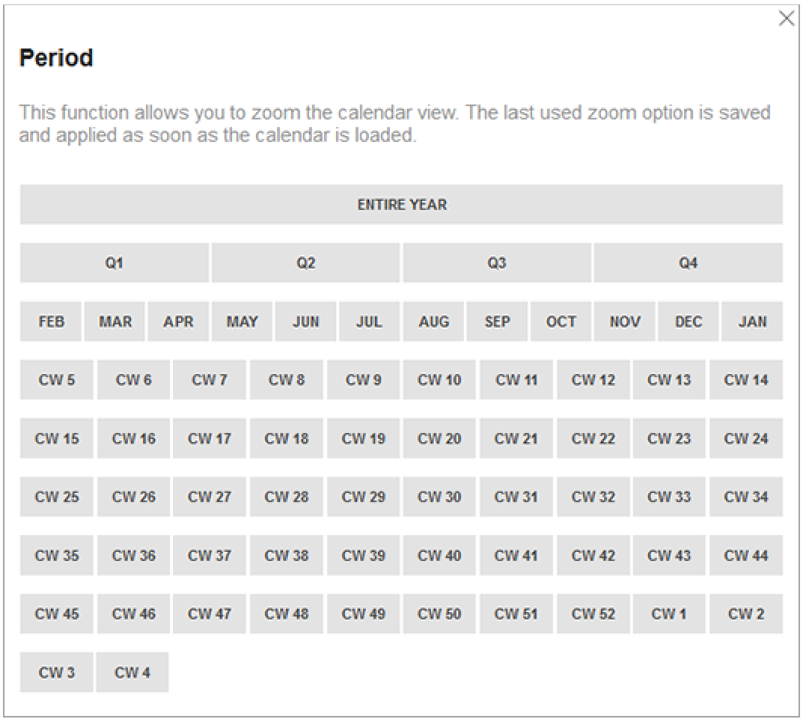
## 2.2 Calendar and calendar view

In the *Calendar* area, you can plan the content of individual marketing measures and schedule them. Next to the tree structure, you can see the planning area in which the timelines for a measure are created and displayed.




Click one of the following icons to change the display of the calendar view:

| Area | Description |
|---|---|
| *Element view* | You can use filters to restrict the view to specific planning elements and control the sorting. You can save created filters and also make them available to other users. For more information, see the *Sorting options* chapter. |
| *Year* | Set the calendar to the desired period. Select one of the existing fiscal years. You can select the desired section of the selected year in the *Period* area. |
| *Period* | Select the part of the year that you want to view in the *Period* area to the left.<br>• : This zooms in the view in stages, i.e. the calendar displays a shorter period. You can zoom up to the day level.<br>• This zooms the view out in stages, i.e. the calendar displays a longer period.<br>• : This opens the following dialog box which you can use to select defined periods. |




- Entire year: displays the entire year.
- Q1 to Q4: displays the selected quarter. If your browser window is large enough, Q1 to Q3 will be left-aligned, and Q4 will be right-aligned. Please note that quarters will be divided up based on how your fiscal year is defined.

**Example**

Your fiscal year begins in April. If you select Q2, the view on the left starts in July. If you select Q4, the view on the right ends with the month of March.

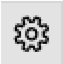
- Month: Displays the selected month. If your browser window is large enough, the first 11 months of your fiscal year will be left-aligned, while the last month will be right-aligned. Please note that quarters will be divided up based on how your fiscal year is defined.

**Example**

Your fiscal year begins in April. If you select July, the view on the left starts with the month of July. If you select March, the view on the right ends with the month of February.

- Calendar weeks: You see the selected calendar week. If your browser window is large enough, the first 51 calendar weeks of your fiscal year will be left-aligned, while the last calendar week will be right-aligned. Please note that quarters will be divided up based on how your fiscal year is defined.

### Further functions

| Area | Description |
|---|---|
|  | Selects an additional detail, which is displayed in a column in the calendar immediately to the right of the elements. One of the following details can be displayed:<br>• Responsible person<br>• Duration<br>• External ID<br>• Element ID<br>• Element type<br>• Element notes (see *General* tab in detailed view)<br>• Dimensions |
|  | This exports the whole calendar or the current view either as a PDF or Excel file. You can decide whether changes are highlighted. The export can be downloaded or sent by e-mail. |

## 2.3 Budget

In the *Budget* area, you plan and manage the budgets for the individual marketing measures. Like in the *Calendar* area, the planned elements are displayed as a tree structure. Next to the tree structure, you can see the planning area for the budget data. You enter planned values here. The actual values (invoices) or POs are recorded in the detailed view of each element. The timelines are displayed as lines in corresponding colors below the data for the month or quarter, provided that this option is activated under > *Settings* > *General*.

### 2.3.1 Budget data

The following budget data is used in the Marketing Planner:

| Name | Description |
|---|---|
| Budget utilization | Schematic representation of the current budget utilization for the relevant planning element:<br>• The dark blue bar represents the proportion of the budget that has been consumed.<br>• A light blue bar represents the proportion of the budget that is still available.<br>• A red bar represents budget overruns. |
| Plan | This displays the planned values that you entered. |
| Target | Display of the target values, which usually represent adjustments to the plan values |
| Committed | The total of the order values. Note that you manage the POs in the detailed view of an element. |
| Actual | The total of the invoices. Note that you manage the invoices in the detailed view of an element. |
| Projected | The projected budget is calculated from the open orders (Committed) and invoices (Actual). The exact rule is displayed below. |
| Remaining | This is calculated by subtracting the projected budget value from the planned value. |
| Trade Allowances | The total of the received marketing development funds |

You can also create customer-specific budget calculations and display them in their own columns in the budget view. For more information, see chapter 5.4.

In addition, you can create fees in the Marketing Planner. Fees are percentage or absolute amounts that are incurred as costs for activities in specific channels. Flagging these fees lets you create a net requirements plan. See chapter 3.113.11 for information about creating fees and chapter 5.5 for information about using fees.

### Displaying the budget utilization

The budget utilization is displayed as follows:

- The dark blue bar represents the proportion of the budget that has been consumed.
- A light blue bar represents the proportion of the budget that is still available.
- A red bar represents budget overruns.

| | Year Budget | | |
|---|---|---|---|
| | Planned | Committed | Actual |
| − liveIN | 2,708,000 | 7,650 | 2,500 |
| − Global Campaign | 800,000 | 13,878 | 41,077 |
| + Special Sale | 55,000 | | 25,000 |
| + Anniversary 25 Years | 4,000 | 3,500 | 4,500 |

Above the monthly columns, a schematic budget utilization view based on the values of the month in question in relation to the yearly budget is also displayed.

| | Year Budget | | | January | | February | |
|---|---|---|---|---|---|---|---|
| | Planned | Committed | Actual | Planned | Actual | Planned | Actual |
| − liveIN | 2,708,000 | 7,650 | 2,500 | 200,000 | 200 | 2,000,000 | 100 |
| − Global Campaign | 800,000 | 13,878 | 41,077 | 100,000 | 1,000 | 200,000 | 28,500 |
| + Special Sale | 55,000 | | 25,000 | | | 55,000 | 25,000 |
| + Anniversary 25 Years | 4,000 | 3,500 | 4,500 | 4,000 | 1,000 | | 3,500 |

### Calculating the projected budget

The projected budget is calculated from the following components:

- Invoices that are not assigned to a PO.
- Invoices that are assigned to closed orders.
- The value of open POs if the assigned invoice amounts are smaller than the PO value.
- Invoices that are assigned to open POs if the invoice amounts are larger than the PO value.

### Example

The following items are created for an element:

Three invoices (€ 100, € 750, and € 1200) are not assigned to a PO.

| Assigned | Order value | Assigned invoices | Calculation status |
|---|---|---|---|
| PO A | 2500 € | 500 €<br>250 €<br>700 € | closed |
| PO B | 1600 € | 900 €<br>1100 € | open |
| PO C | 1500 € | 1350 € | open |

The projected budget value is calculated as follows:

| Part | To be included | Total | Remarks |
|---|---|---|---|
| Invoices that are not assigned to a PO. | 100 € + 750 € + 1200 € = | 2050 € | |
| Invoices that are assigned to closed orders. | 500 € + 250 € + 700 € = | 1450 € | PO A |
| The value of open POs if the assigned invoice amounts are smaller than the PO value. | 1500 € | 1500 € | PO C |
| Invoices that are assigned to open POs if the invoice amounts are larger than the PO value. | 900 € + 1100 € = | 2000 € | PO B |
| | *Projected:* | *7000 €* | |

### Currency

To manage budgets in multiple countries, you can assign various currencies to the planning elements. The administrator specifies which currencies are available in the system in the settings (see chapter 3.10). To compare budgets from different countries, the administrator also defines a reference currency and corresponding exchange rates for each year. Other currencies are converted into the reference currency using the exchange rates.
In the budget view, you can choose whether the budget data is displayed in the working currency (i.e. in the currency defined for the element) or in the reference currency. This applies to the *Planned*, *Target, Committed*, *Actual*, *Projected*, *Remaining*, and *MDF* columns. You can also show the currency of the displayed data in a column.

### Budget scale

To ensure that it is also easy to record and compare high amounts, you can select the budget scale for the budget view.

For example, €1,150,560:

| Setting | Diagram |
|---|---|
| 1:1 | 1,150,560 |
| 1:1,000 | 1,150 |
| 1:1,000,000 | 1 |
| 1:1000000000 | 0 |

### Decimal Places

You have the option of displaying budget data with exactly 2 decimal places or rounded using the setting *Display decimal places*.

Examples:

| Setting activated | Setting deactivated |
|---|---|
| 1,566.99 | 1,567 |
| 12,356.12 | 12,356 |
| 18,542.50 | 18,543 |
| 1,500.00 | 1,500 |

### 2.3.2 Further information

You can display the following additional information in separate columns:

- Responsible person
- Duration
- External ID
- Element ID
- Element type
- Element notes (see *General* tab in detailed view)
- Dimensions

If you open the context menu when displaying an additional piece of information in the *Year Budget* column, you can view the *Insert/Edit additional information* menu item. If you display the *Responsible person*, *Duration, External ID*, or *Element ID* information, the function opens the element detailed view on the *General* tab. If you display a dimension, the editing dialog for the dimension for this element opens.

### 2.3.3 Hints in the event of inconsistencies

The Marketing Planner helps you to plan your budget by highlighting inconsistencies with colored triangles for the budget values in question. The font color of the budget value can also indicate inconsistencies or provide you with information about the origin of the budget value.

| | |
|---|---|
|   | A gray corner join in the budget cell of a parent element indicates that one or more sub-budgets are causing problems. |
|   | A red corner join in the budget cell may indicate one of two inconsistencies:<br>• The sum of the sub-budgets exceeds the total budget.<br>• The sum of the monthly budgets exceeds the yearly budget. |

**Note:** When you move the mouse over a color-coded budget cell, a balloon containing an info text about the detected inconsistencies is displayed.

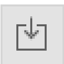
A gray font indicates that the budget value was calculated automatically (for instance, from an entered PO, invoice, or sub-budget).

A black font indicates that the value was entered in the budget view manually. Note that this is possible only for planned values.

A red font indicates that the value exceeds the planned value and that no more of the budget is available in the *Remaining* column. In the *Projected* column, a red font indicates that the value is higher than the planned value, or that no planned value is entered although a projected budget is available.

### 2.3.4 Control elements

Click one of the following icons to change the display of the budget view:

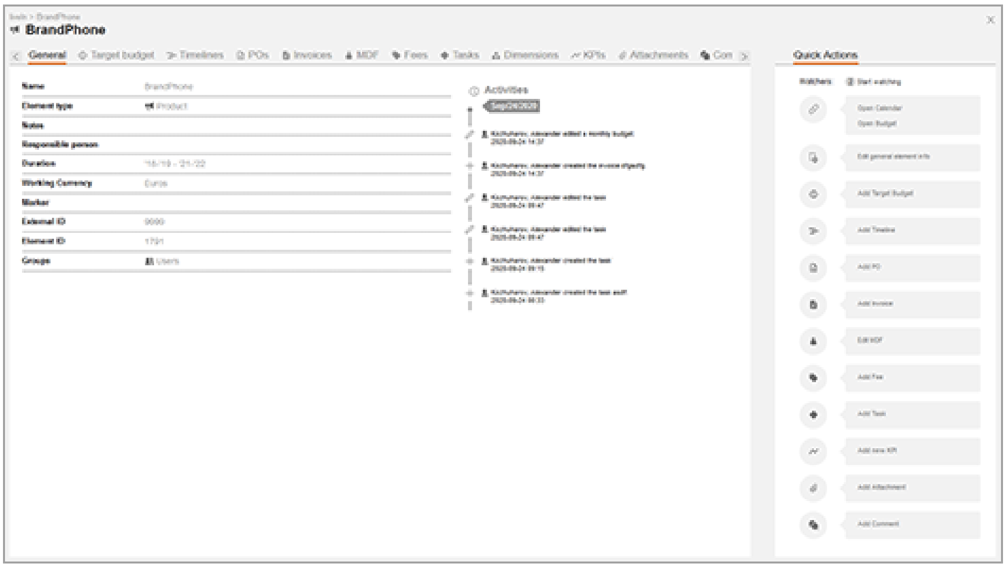
| Icon/Button | Description |
|---|---|
| Element view | You can use filters to restrict the view to specific planning elements and control the sorting. You can save created filters and also make them available to other users. For more information, see the *Sorting options* chapter. |
| Year<br>2016 ▼ | Select the year whose planning elements are displayed as the tree structure. |
| Year view<br>QUARTER<br>MONTH | You can switch between the *Quarter view* and *Month view*.<br>**Note**: note that you cannot enter planned values in the quarterly view. The totals of the three months are displayed in the quarter instead. |
| Budget views | Select a budget view or edit a view.<br>Budget views are defined by you or another user and published for other users where necessary. A view contains information such as dimensions, the responsible person, the duration of the element and the budget data, shown as yearly or monthly values. In addition, you can define the budget scale and the currency displayed in the view. You can also choose whether it is possible to switch to the year view (quarter/month, see the previous table row) and whether the applied configuration is displayed (see the table row below).<br>For more information, see chapter 5.3. |
| Applied configuration | This area shows the budget scale and currency type used to display the budget. |
|  | This exports the whole view or current view as an Excel file. You can decide whether changes are highlighted. The export can be downloaded or sent by e-mail. |

**Note:** When you leave the budget view, the settings you used last are saved and are restored the next time that you call up the budget view.

## 2.4 Detailed view

Each element has a detailed view in which all of the information about the element is collected. You can open the detailed view in two different ways:

- In the tree structure in the calendar or budget view, you double-click the element whose detailed view you want to open.
- In the tree structure in the calendar or budget view, you right-click the element whose detailed view you want to open. The context menu opens. Choose *Details...*.




### Tabs

In the upper of the detailed view, you can switch to the various tabs:

- *General*: This tab contains basic specifications and information for the element such as the name, responsible person, or the currency. If you have the appropriate authorization, you can view the activity history on the right of the tab. For example, the history shows when timelines, budgets, or POs were added, edited, and deleted and when changes were made on the *General* tab. The most recent activity is displayed at the top, and up to 20 activities are displayed directly. You can use the More button to display additional activities, up to a maximum of one month ago.
- *Target budget:* On this tab, you manage the target budget of the planning element, see chapter 5.2.
- *Timelines*: This tab contains a table overview of all timelines assigned to the element. For more information, see the chapter Timelines.
- *POs*: On this tab, you manage the POs that are assigned to the element. For more information, see the chapter Creating a PO on page 138. For information about integrating budgets, POs, and invoices in the budget view, see the chapter Schematic yearly and monthly view on page 26.
- *Invoices*: On this tab, you manage the invoices that are assigned to the element. For more information, see the chapter Configuring an invoice on page 185. For information about integrating budgets, POs, and invoices in the budget view, see the chapter Schematic yearly and monthly view on page 26.

- *MDF*: This tab is provided for when you want to request market development funds for an invoice. For more information, see the chapter Requesting market development funds on page 188.
- *Tasks*: To structure extensive projects, you can subdivide them into smaller work packages. You can create these work packages as tasks or jobs on the *Tasks* tab and enter other users as responsible processors for them. For more information, see the chapter Creating tasks on page 100.
- *Dimensions*: You can use dimensions to assign configurable types to individual elements. A dimension can map criteria such as target groups, target markets, groups in which you participate, or product lines, for example. For information about editing a dimension, see the chapter Filling out dimensions on page 183. The chapter Dimensions on page 58 explains how dimensions are created.
- *KPIs*: You can use KPIs to rate the success of your measures. For more information, see the chapter Measuring the targets achieved using KPIs on page 191. The chapter KPIs on page 65 describes how to create KPIs.
- *Attachments*: You can update an element with more information and, for example, attach a promotional brochure for a sales promotion to that sales promotion as a file. For more information, see the chapter Attachments on page 135.
- *Comments*: This tab can be used to provide information for other users. See Leaving comments for planning elements on page 196.

**Quick access**

In the area on the right, you can access the following functions, regardless of which tab you select:

- *Open Calendar*: This displays the planning element whose detailed view you opened in the calendar.
- *Open Budget*: This displays the planning element whose detailed view you opened in the budget view.
- *Edit general element info*: You can add content such as information texts, images, or videos to the planning element. See Content enrichment on page 112.
- *Add Timeline*: This opens the dialog box for creating a timeline. See Timelines.
- *Add Order*: This opens the dialog box for creating a PO. See Creating a PO on page 138.
- *Add Invoice*: This opens the dialog box for adding an invoice. See Adding an invoice on page 185.
- *Edit MDF*: This opens the dialog box for requesting market development funds (MDF). See Requesting a market development fund on page 188.
- *Add Task*: This opens the dialog box for creating a task. See Creating tasks on page 100.
- *Add new KPI*: This opens the dialog box for adding a KPI. See Adding a KPI on page 191.
- *Add Attachment*: This opens the dialog box for adding an attachment. See Attachments on page 135.

### Adapting tables

To adapt the detailed view tables to your requirements (for example, on the POs tab), you have the following options. The settings are saved for each user and can be adjusted again at any time.

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

## 2.5 The Settings area

You configure the Marketing Planner in the > *Settings* area. For example, you can create categories for various measures or create the years for your marketing plans. The various functions are divided onto several tabs.

| Name | Description |
|---|---|
| *Categories* | You can define the categories based on which you want to distribute the measures. Timelines are assigned to a category so that the various measures, tasks, events, and so on, can be displayed in an overview in the planning area. |
| *Calendar* | You name and activate the levels that you need to build the tree structure. Each level name represents a possible planning element for the tree structure. You can define:<br>• The depth of the tree structure<br>• The names of the levels |
| *Element types* | This lets you manage element types. Element types are used to highlight planning elements as campaigns, programs, or activities, for example. You define the name of the type, an icon, font properties, and the background color. |
| *Marker* | You can configure the markers that are available to users:<br>• Activate or deactivate markers from the default set<br>• Create and manage your own markers<br>• Manage short help texts for the markers |
| *General* | You specify the following:<br>• The display of the timelines in the budget view and in the export of the budget view<br>• The display of the timeline name in the calendar view and calendar view export<br>• The regular expression for the external ID of the planning elements<br>• Starting re-indexing of the dashboard search<br>The changes come into effect only after you save and reopen the Marketing Planner. |

| Name | Description |
| --- | --- |
| *Years* | Here, you create the years for which you can create a marketing plan.<br>You can restore the original name of a year.<br>This creates the planning type for the created year. Choose:<br>• Top down to work with budget values stored centrally.<br>• Bottom up to enable the individual assignment of budget values. |
| *Dimensions* | You can create dimensions or edit existing ones. You can use dimensions to display criteria such as target groups, target markets, groups that you participate in, or product lines. You can sort views according to dimensions or generate evaluations based on dimensions. |
| *KPIs* | You can create KPIs or edit existing ones. You can use KPIs to rate the success of your marketing measures. |
| *Exchange rate & Currencies* | You create exchange rates to enable the conversion of budget values into the working currency in relation to the reference currency.<br>You can also create currencies so that the campaign planning can be carried out with the currencies that are normally used in a country, for example. You can define both the working currency of a planning element and the reference currency. |

## 2.6 The Reports area

You can use the integrated reporting functions in the Marketing Planner to create various reports using up-to-date data and to stage them graphically at the click of a button. Choose > *Reports* and select a report type.

| Name | Description |
|---|---|
| *Project Budgets* | This generates a pie chart that displays the distribution of the total budget of an element to its corresponding measures. You can generate the report on the basis of all of the budget columns. |
| *Budget Comparison* | This generates a bar chart in which the selected budget columns for a selected planning element are displayed as well as any budget overruns. |
| *Activity Overview* | This generates a bar chart that displays the number of timelines allocated in calendar weeks. |
| *KPI Evaluation* | This generates a bar chart that contrasts the target values for the KPIs of the selected planning elements with the values that have actually been achieved. |
| *KPI Comparison* | This generates a bar chart that compares the achieved KPI values with each other. |
| *KPI Benchmarks* | This generates a bar chart that displays the distribution of the minimum, maximum, and mean KPI values. |
| *Tops and Flops* | This generates a hit list for the KPIs that lists the planning elements with the highest and lowest achieved values. |
| *Tabular Report* | This creates a table with an overview of the selected planning elements. The planning elements can be grouped by predefined criteria, such as dimensions. You can combine various information from the Marketing Planner in a column set and use it for the grouping. |

## 2.7 Exports

If you want to use the calendar and budget view or the reports outside of the Marketing Planner, you can export them quickly and easily with the push of a button. Click to call the export dialog box.

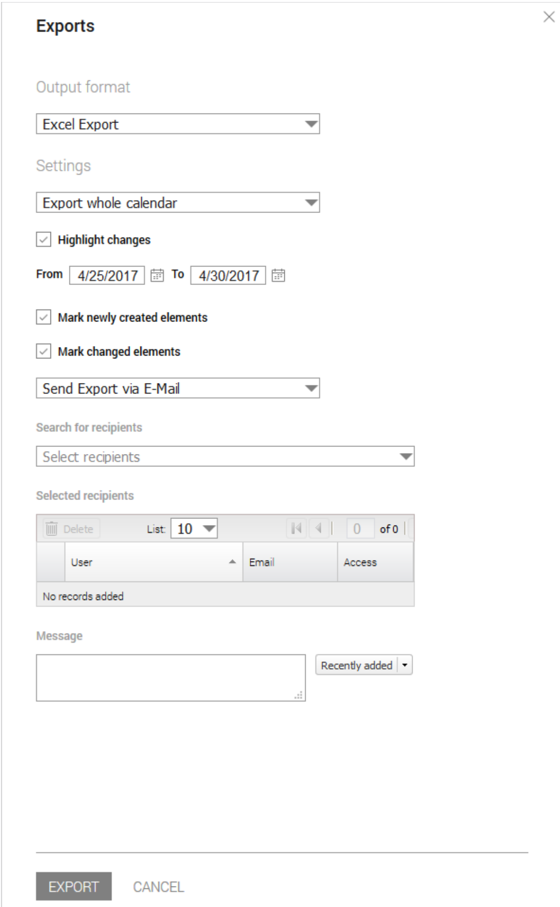
### Exporting reports

If you export a report, the created graph is saved or opened in PNG format.

### Exporting the calendar and budget view

| Name | Description |
| --- | --- |
| *Output format* | You can export the view either as an XLSX or PDF file. You can export the budget view only as an XLSX file. |
| *Output settings* | You can choose either *Export whole calendar* or *Export current view*. If you choose *Export whole calendar*, all of the elements from the year that is currently displayed are exported. If you choose *Export current view*, only the elements from the active view are exported.<br>Activate the *Highlight changes* checkbox to highlight the planning elements that are either created and/or changed within a specific timeline. |
| *Download export/Send Export via E-Mail* | Decide whether you want to download the data or send it directly. |
| *Search for recipients* | You can use the search field to select the e-mail recipient. |
| *Selected recipients* | The overview table displays all the users that have been selected as recipients. You can delete users from the recipient list. The *Access* column shows whether the user is authorized to use the Marketing Planner. |
| *Message* | You can enter text for the message, if required. You can also send the e-mail without any message text. |

**Note:** Once the export file has been created successfully, a message at the bottom of the dialog box informs you that you can close the window.




## 2.8 View

You can filter the planning elements displayed in the tree structure. You can:

- Save a filter
- Restore a saved view
- Publish a view so that other users can access your saved view

In the calendar or budget view, click *View* to open the *Views* dialog box.

**Note:** You can sort the planning elements displayed in the calendar or budget view alphabetically. You can also use freely definable sort options to filter the views in order to hide certain planning elements from the view. To make the user navigation more consistent, the *Sort Elements* option is hidden from the context menu if a sort option (filter) is active.

For more information about views, see *Views and filters* on page 172.

## 2.9 User groups and roles

To control access to the individual elements of your marketing plan, you can create user groups and specify which elements of the tree structure the members of a user group can access. In addition, you can make certain dimensions accessible only for specific user groups. A role is also assigned to a user group. A role groups together various rights, which define, for example:

- which of the tabs in the detailed view can be opened,
- whether a tab with read or write authorizations can be opened. You require write authorizations to add an invoice to an element, for instance.

**User groups:**

You can use user groups to group together users that have the same requirements profile. Users are assigned to a user group. The user group is used to define the access to individual elements of the marketing plan. In addition, specific dimensions can be approved for individual user groups.

**Rights:**

Various rights are assigned to a role. Rights define which areas and functions a user can call.

The following roles are created by default in the Marketing Planner:

| Name | Description |
|---|---|
| *Administrator* | This role has read and write authorizations for all areas. The Administrator can change the calendar, budget plans, and settings of all users. |
| *Employee* | The *Employee* role encompasses the rights of the *Employee Budget* and *Employee Calendar* roles. |
| *Employee Budget* | This role has read and write access to the budget plan. Users can enter, change, or delete budgets and open the General tab in the detailed view. The role allows only read access to the calendar view. |
| *Employee Calendar* | This role has read and write access to the calendar view. Users can edit timelines and elements but cannot access budget planning or settings. |
| *Guest* | This role has read access to the calendar view and budget planning. |
| *Manager* | This role has read and write access to the calendar and budget view. Managers only have read access to settings for dimensions, KPIs, and users. |

**Note**

Rights and roles concepts are implemented on a customer-specific basis. If you are unable to call functions or areas that are described in this manual, it may be because you do not have the necessary rights. Furthermore, the names and scopes of the roles defined in your company may differ from those described in this manual. The roles that you can assign to a user group are created and maintained in the configuration area of your BrandMaker system. If you need to edit a role, please contact your system administrator.

## 2.10 Linking with other modules

You have the option of accessing a filtered view or the detailed view of a planning element of the Marketing Planner module in the *Dashboard* module. You will get the corresponding links as follows:

**Copy link to detailed view of a planning element**

1. Double-click on the planning element in the element tree.

   The detailed view opens and the *General* tab is displayed. The tab contains the *Link to element* entry in the table.

2. To do this, click the button to right of this entry.

You have copied the link to the detailed view of the planning element to the clipboard.

**Copy link to the filtered view**

1. Call up the calendar or budget view, depending on what you want the link to open.
2. Activate the filtered view. For more details, see Chapter 6.
3. Click the *Link to view* button under the Elements views drop-down list.

   A dialog box opens. The link is displayed in a field.

4. To do this, click the button to right of the field.

You have copied the link to the filtered view to the clipboard. Click OK to close the dialog box.

# 3 Setting up the Marketing Planner

The settings and configurations described below are required to work with the Marketing Planner. For some of the functions and actions described, it is necessary to have extensive authorizations that are usually reserved for administrators.

**Note:** If you require one of the functions described but cannot use it, please contact your system administrator.

Note that on the pages under > *Budget & Calendar* > *Settings*, a note is displayed on which day and by which user the page was last modified. This concerns the descriptions in the chapters 3.2**Fehler! Verweisquelle konnte nicht gefunden werden.** to 3.7 as well as 3.9 to 3.11. The only exception is the page under > *Budget & Calendar* > *Settings* > *Dimensions* (see Chapter 3.8).

## 3.1 Group rights, user rights, and approvers

Choose > *User* to:

- Create a new user group
- Define which elements of the tree structure a user group can access
- Define which dimensions the user group can use
- Assign a role to a user
- Enter a user as an approver

### 3.1.1 Creating a user group

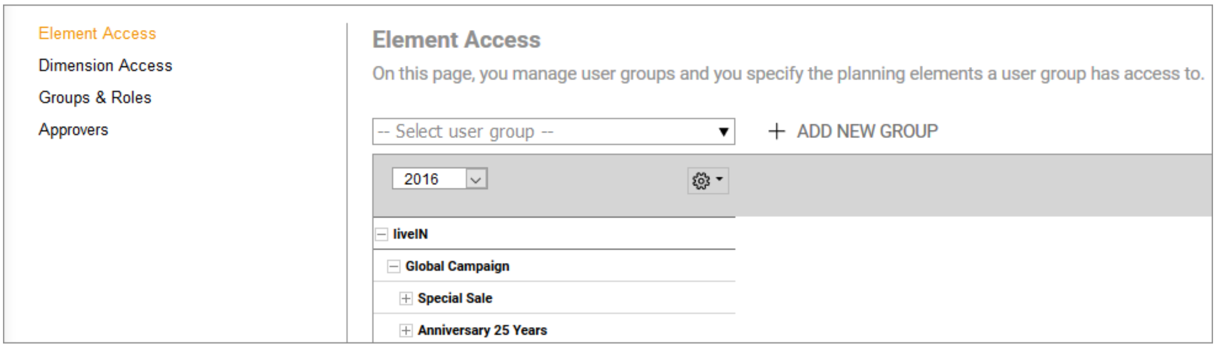
You want to create a new user group.

1. Choose > *User*.

This opens the *Element access* tab.

2. Choose *Add new group.*
3. Enter the name of the user group in the dialog box that opens.
4. Optional: Activate the checkbox Open user group in the list.
5. Confirm your entry by clicking *OK*.

The user group has been created. If you activated the checkbox, the user group is displayed.




If you have finished editing a user group and saved your changes and you want to remove it from the overview, activate the checkbox for the user groups and click the *gear* icon and then *Remove from overview*. If you want to select all of the user groups, click the *gear* icon and then choose *Select all*. If you want to cancel a selection, click the *gear* icon and then choose *Deselect all*.

### 3.1.2 Defining access to elements and dimensions

You have created the user group `Filiale Süd`, for example, and want to approve individual planning elements and dimensions for this user group.

**Prerequisites**

- You have already created planning elements and dimensions.

**Defining access to elements**

1. Choose > *User*.

   This opens the *Element access* tab.

2. In *Select user group*, select Filiale Süd.

   The user group is displayed.

3. If you want to set up access to elements that are available only in specific years, choose the year from the dropdown list.

   The planning elements are displayed.

4. In the column of the selected user group, activate the checkboxes of the elements that the user group `Filiale Süd` can access. The access is inherited by any existing sub-elements.

> **Note:** A light-green checkmark indicates that the setting has been inherited from the parent element.

5. Click the *Plus* sign next to an element to display any existing sub-elements. If you want access to be limited to specific individual sub-elements, you must first deactivate the checkbox for the parent element.
6. Click *Save* to save your entries.

You have defined the planning elements that the `Filiale Süd` user group can access.

**Defining access to multiple dimensions for a user group**

1. Choose > *User*.

This opens the *Element access* tab.

2. Go to the *Dimension access* tab.
3. In *Select user group*, select Filiale Süd.

The user group is displayed.

4. In the column of the selected user group, activate the checkboxes of the dimensions that users from the user group can access.
5. Click *Save* to save your entries.

You have defined the dimensions that the `Filiale Süd` user group can access.

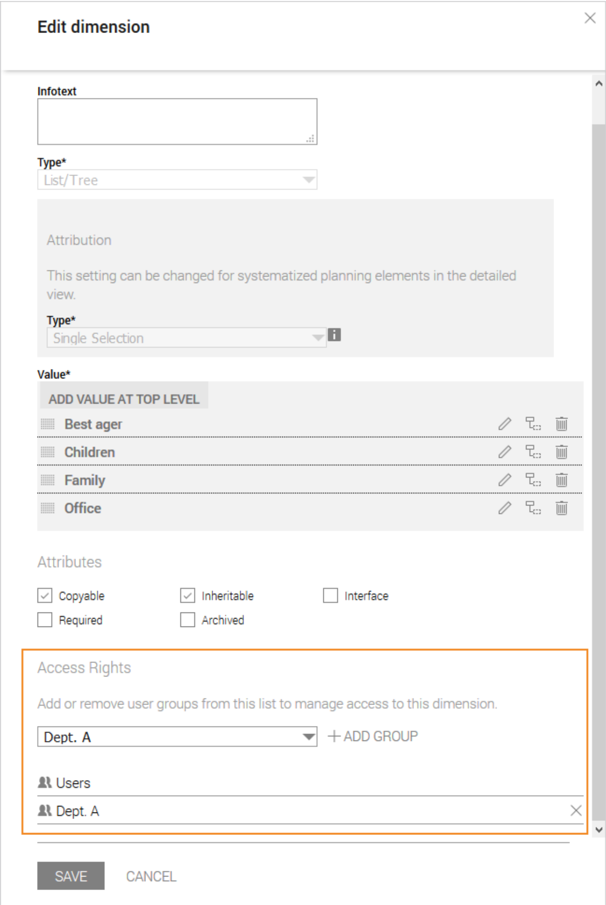
**Defining access to a dimension for multiple user groups**

1. Choose > *Settings* and go to the *Dimensions* tab.
2. Double-click the dimension for which you want to define access.

This activates the *Edit Dimension* dialog box.

3. In the *Access rights* area, select the user groups which you want to authorize to access the dimension.
4. Click *Add Group*.
5. Choose *Save* to confirm your entries.

You have chosen which user groups can access the dimension.




### 3.1.3 Assigning users and roles to user groups

You first want to assign a user to a user group. You then want to assign a role to the user.

#### Prerequisites

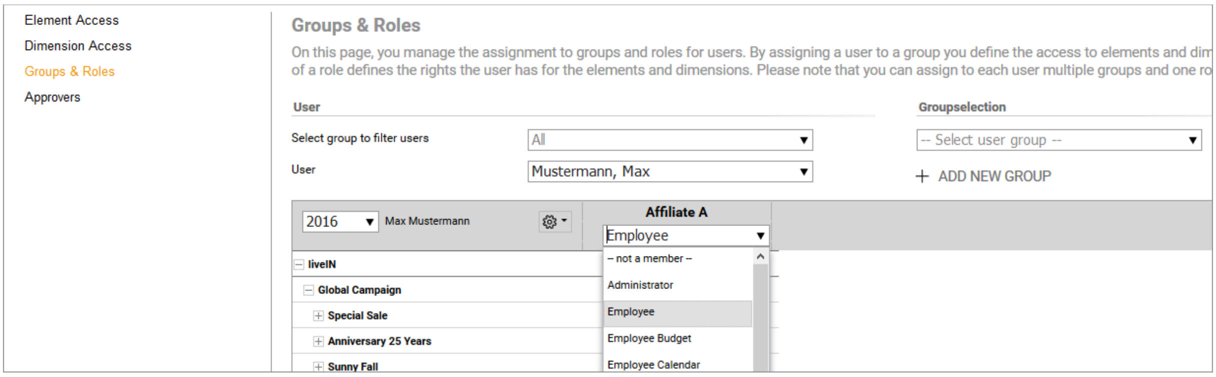
You have already created a user group.

#### Step by step

1. Choose > *User* > *Groups & Roles*.
2. From the *Select group to filter users* dropdown list, select the entry *All*.
3. From the *User* dropdown list, select the user that you want to assign to a user group.
4. From the *Select group to filter users* dropdown list, select the user group to which you are assigning the user.
5. In the dropdown list below the user group, select the role that the user is to receive.
6. Click *Save.*

You have assigned the user to the user group and the role.

**Note:** You can use the *Select group* picklist to filter the user picklist. In the *User* picklist, only the users assigned to the user group that you have chosen can be selected.




### 3.1.4 Changing the name of a user group

You want to change the name of a user group (from `Filiale Süd` to `Filiale Süd-Ost`, for example).

1. Choose > *User*.

This opens the *Element access* tab.

2. In *Select user group*, select Filiale Süd.

The user group is displayed.

3. Set the mouse pointer on the user group name.

A checkbox is displayed next to the name.

4. Activate the checkbox.
5. Click the *gear* icon and then > *Edit*.

The name of the user group is displayed in an editable field.

6. Change the name.
7. Click the *checkmark*.

The name of the user group is changed.

### 3.1.5 Deleting a user group

You want to delete a user group.

**Prerequisites**

A user is not assigned to the user group.

**Step by step**

1. Choose > *User*.

   This opens the *Element access* tab.

2. In *Select user group*, select Filiale Süd.

   The user group is displayed.

3. Set the mouse pointer on the user group name.

   A checkbox is displayed next to the name.

4. Activate the checkbox.
5. Click the *gear* icon and then > *Delete user group*.
6. In the dialog box that opens, choose *Yes* to confirm the deletion.

The user group is deleted.

### 3.1.6 Entering a user as an approver

If you are using the MDF (marketing development funds) function, you require users who can process (approve or reject) the requests for marketing developing funds. These users must be entered as approvers.

7. Choose > *User*.

   This opens the *User* area on the *Element access* tab.

8. Choose the *Approvers* tab.
9. In the *Approvers* dropdown list, select the users that you want to enter as approvers.

The user is entered as an approver in the list. The user can see *Approvals* in the upper navigation pane in the Marketing Planner and can process requests for marketing development funds.

## 3.2 Defining categories

You can use categories to display the various measures in a structured and clear way. You can assign a timeline to a category to display and distribute the various measures, tasks, events, and so on in an overview in the planning area.

### 3.2.1 Creating categories

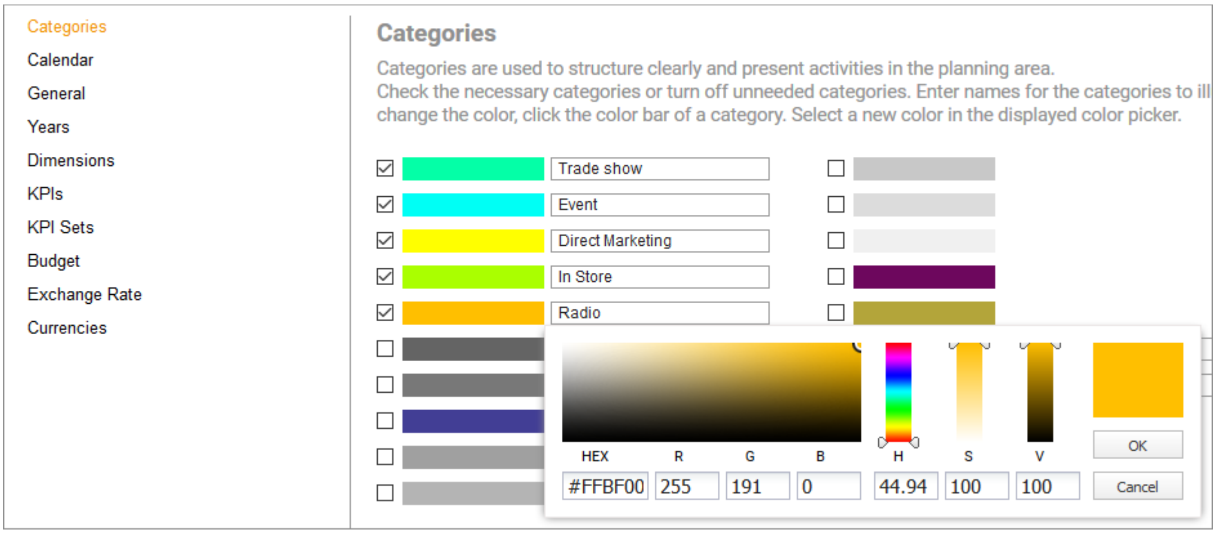
You want to create categories to display your various marketing measures.

1. Click > *Settings* > *Categories*.
2. Activate the checkboxes next to the colored bars that you want to use as categories.
3. Enter the names of the categories in the input field.
4. Deactivate the checkboxes of any unneeded colored bars.
5. Click the colored bar for the activated categories.

A color picker opens.

6. Choose a color for the category.
7. Click *Save* to save your entries.

You have created categories.



## 3.3 Defining a calendar structure

You can use level names to provide the structure for your marketing plan. Each level name represents a possible element of the tree structure. In the *Settings > Calendar* area, you can define:

- The depth of the tree structure
- The names of the levels

You can set up your marketing plan from a number of different perspectives. For example, you can map a marketing plan using the following levels:

| Tree Level | Description |
|---|---|
| Company (Level 1) | You can define the name of the starting point for your marketing plan (for example, the company name). |
| Department (Level 2) | You can specify that the various company departments are to be mapped as the first level. |
| Project (Level 3) | You can specify that the projects are to be mapped as sub-elements of a department. |
| Media (Level 4) | You can specify that a medium is to be mapped as a sub-element of the project. |
| Communication channel (Level 5) | You can specify that the communication channels of the medium are to be mapped as sub-elements. |
| Action (Level 6) | You can specify that each respective action or activity is to be mapped as a sub-element of the communication channel. |

### 3.3.1 Entering level names

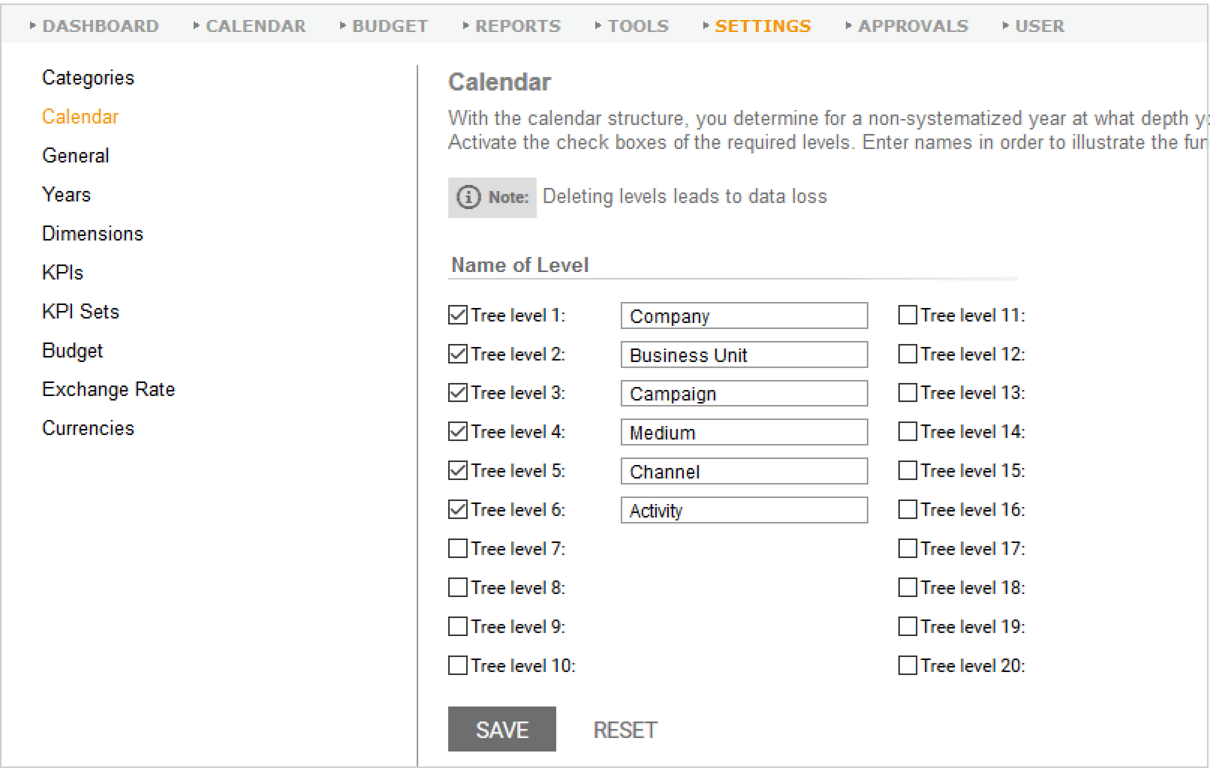
You want to enter the name for the levels so that you can map your marketing plan in a structured way.

1. Choose > *Settings* > *Calendar*.
2. Activate the number of levels required to map your marketing plan in the structure that you want.

> **Note:** You can use up to 20 levels for the tree structure. To activate all the checkboxes simultaneously, set the checkmark for Level 20. To deactivate the checkboxes for all the levels that are not required simultaneously, remove the checkmark for the first level name that is not required.

3. Enter the level names in the input fields.
4. Click *Save* to save your entries.

The names of the levels that you have activated and that are in use are displayed in the context menu when you call the *New Element* and *New Sub-element* functions.



## 3.4 Element types

Element types are used to highlight planning elements as campaigns, programs, or activities, for example, or highlight them based on other criteria. Go to *> Marketing Planner > Settings > Element types* to define the name of the type, an icon, font properties, and the background color.
When you create an element, you assign an element type to it and can also change the type later while editing the element. Highlighting an element with a certain type allows you to filter by element types and create reports about specific types.

To be able to highlight a planning element with an element type, you must activate the element type.

**The properties of an element type**

When you create an element type, you define the following properties:

| Function | Description |
|---|---|
| *Name* | Unique name of the type |
| *Icons* | Select an icon. For example, the icon is displayed next to the name in the element tree.<br>You have the possibility of choosing either a standard icon or to upload an icon:<br>• Standard icons: <br>If you select the gray square, no icon is displayed.<br>• The upload of icons is restricted to the file formats GIF, PNG, and SVG. Recommended size is 16 x 16 px. Uploaded icons can be replaced and - if it is not selected for any element type - deleted. To do this, click on the icon when creating or editing an element type and select the desired action from the context menu. |
| *Font properties* | You define the following properties:<br>• *Bold*: Defines whether the name is highlighted in bold in the element tree.<br>• *Italic*: Defines whether the name is highlighted in italics in the element tree.<br>• *Text Color*: Defines the color in which the name is displayed in the element tree.<br>• *Background color*: Defines the background color used to display the element. Note that the whole line in the calendar and in the budget view receives this background color. Therefore, when selecting the color, ensure that timelines, task icons, and the font in the budget view stand out sufficiently. |

**Associated tasks**

- Creating an element type (see chapter 3.4.1)
- Activating an element type (see chapter 3.4.2)
- Editing an element type (see chapter 3.4.3)
- Deleting an element type (see chapter 3.4.4)

### 3.4.1 Creating an element type

1. Choose > *Marketing Planner* > *Settings* > *Element types.*
2. Choose *Add element type*.

The *Edit Element Type* dialog box opens.

3. Enter a unique name.
4. Optional:
    a. Select an icon: Click on the desired icon. Standard icons are selected directly. For other icons a context menu is opened. Click the selection icon.

Or

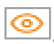
    b. Upload an own icon and select the uploaded icon. Note the restrictions for file format and size, see chapter 3.4

5. Optional: Edit the element type display.
6. Click *Save*.

You have created the element type.

### 3.4.2 Activating an element type

1. Choose > *Marketing Planner* > *Settings* > *Element types.*
2. Click the  icon for the element type that you want to activate.

The element type is activated. The activation icon changes to .

### 3.4.3 Editing an element type

1. Choose > *Marketing Planner* > *Settings* > *Element types.*
2. Click the pencil icon for the element type that you want to activate.

The *Edit Element Type* dialog box opens.

3. Make your changes.
4. Click *Save*.

You have edited the element type. Your changes are applied immediately and displayed accordingly for the elements.

### 3.4.4 Deleting an element type

**Attention!**

You cannot undo the deletion of an element type.

**Note**

Note that you can only delete element types that are not assigned to a planning element. BrandMaker therefore recommends deactivating the element type first. Then, filter all the elements that are marked with this element type and change the element type of these elements. After that, perform the instructions below.

1. Choose > *Marketing Planner > Settings > Element types.*
2. Click the recycle bin icon for the element type that you want to delete.

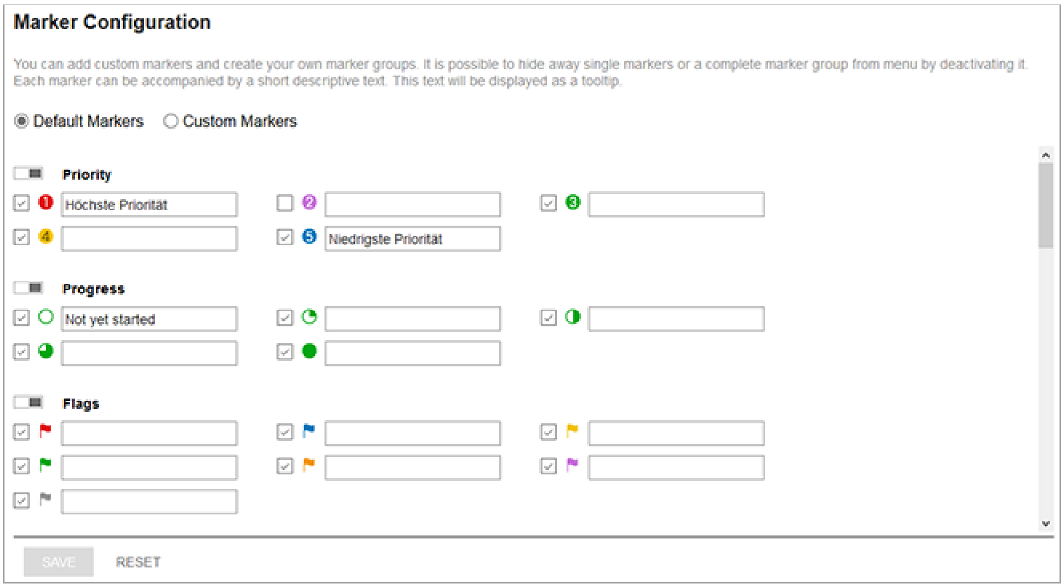
A confirmation prompt is displayed.

3. Choose *Yes*.

You have deleted the element type.

## 3.5 Marker

The Marketing Planner provides an extensive range of markers. You can choose *> Marketing Planner > Settings > Marker* to manage the markers provided by default or add your own markers if necessary.




Under *> Marketing Planner > Settings >Markers*, you can activate and deactivate individual markers or whole groups of markers. Note that only activated markers can be used for the planning elements.

You can also make customized marker groups with your own icons. The icons must be available in the formats GIF, SVG, or PNG. The recommended size is 16 x 16 px. In this case, too, only activated markers or marker groups can be used for planning elements.

To ensure that the icons are used correctly, you can provide each marker – regardless of whether they are included in the standard package or provided as a customized upload – with a short help text containing up to 255 characters. This help text is displayed as a tooltip on mouseover, for example in the element tree, on the General and Tasks tabs in the details view, in dashlets and on tasks in the calendar.

### Associated tasks

- Configuring a default marker (see chapter 3.5.1)
- Creating a custom group and markers (see chapter 3.5.2)
- Editing a custom group and markers (see chapter 3.5.3)
- Deleting a custom group and markers (see chapter 3.5.4)

### 3.5.1 Configuring a default marker

1. Choose > *Marketing Planner > Settings > Markers.*
2. In the upper area, activate the radio button *Default Markers*.
3. Choose which markers are available to users:
    a. Activate or deactivate marker groups: Click the switch to the left of the group name (e.g. *Communication*).
    b. Activate or deactivate the individual markers using the checkbox to the left of the icon. Note that you can do this only within an activated marker group.
4. Recommendation: Provide users with information about the function or use of the markers by entering a short description in the text field of each marker (max. 255 characters).
5. Click *Save*.

You have configured the default markers.

### 3.5.2 Creating a custom group and markers

1. Choose > *Marketing Planner > Settings > Markers.*
2. In the upper area, activate the radio button *Custom Markers*.

The interface for managing custom markers is displayed.

3. Choose *Create new marker group*.

The *Add marker group* dialog box appears.

4. Enter a user name.
5. If you want the group to be available to users immediately after saving, activate the checkbox to the left of the name field.
6. Drag and drop the files for the marker icons or click the upload area to search for the files.
7. If you want the markers to be available to users immediately after saving, activate the checkboxes to the left of the icons.
8. Enter a help text for each marker.
9. Click *Save*.

The dialog box closes and the marker group is created with the added markers. Users can now use the activated markers.

### 3.5.3 Editing a custom group and markers

1. Choose > *Marketing Planner* > *Settings* > *Markers.*
2. In the upper area, activate the radio button *Custom Markers*.

The interface for managing custom markers is displayed.

3. Choose *Edit group* next to the group that you want to edit.

The *Edit marker group* dialog box appears.

4. Optional: Edit the group name.
5. Optional: Drag and drop additional files with marker icons or click the upload area to search for the files.
6. Optional: Replace the marker icons:

> **Note**: You can only replace marker icons that are not in use.

   a. In the line of the marker icon that you want to replace, click the ⋮ button on the right.
   b. Choose *Replace marker*.
   c. In the dialog box that opens, select the new file and choose *Open*.

   The marker icon is now replaced.

7. Optional: Delete markers that are not required:

> **Warning!** You cannot undo the deletion of markers.

> **Note**: You can only delete markers that are not in use.

   a. In the line of the marker icon that you want to delete, click the ⋮ button on the right.
   b. Choose *Delete marker*.

   A confirmation prompt is displayed.

   c. Choose *Yes*.

   The marker is deleted.

8. Optional: Change the activation of the group or of individual markers.
9. Optional: Edit the help texts for the markers.
10. Click *Save*.

The dialog box closes and the marker group is available with the changes made. Users can now use the activated markers.

### 3.5.4 Deleting a custom group or markers

**Attention!**

You cannot undo the deletion of markers or marker groups.

**Note**

You can only delete groups containing markers that are not in use. You can only delete markers if they are not in use.

1. Choose > *Marketing Planner* > *Settings* > *Markers.*
2. In the upper area, activate the radio button *Custom Markers*.

The interface for managing custom markers is displayed.

3. Choose *Edit group* next to the group that you want to edit.

The *Edit marker group* dialog box appears.

4. Optional: Delete markers that are not required:
   a. In the line of the marker icon that you want to delete, click the ⋮ button on the right.
   b. Choose *Delete marker*.

   A confirmation prompt is displayed.

   c. Choose *Yes*.

   The marker is deleted.

5. Optional: Delete the marker group.
   a. Choose *Delete group*.

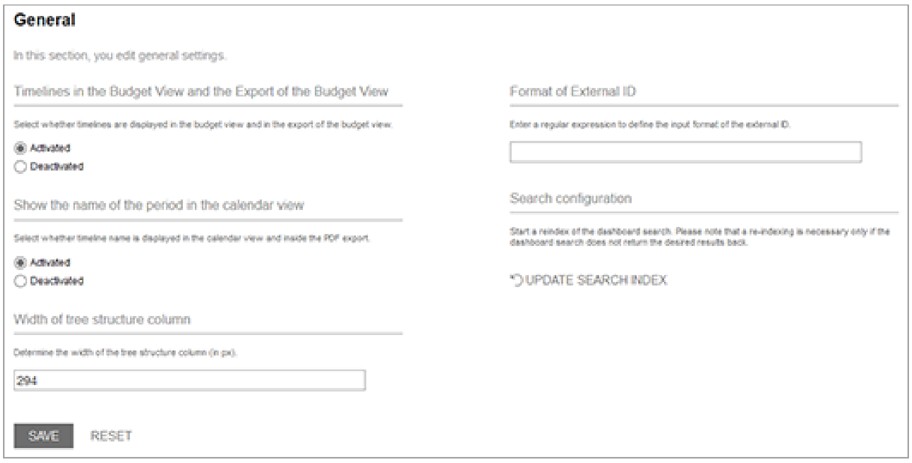
   A confirmation prompt is displayed.

   b. Choose *Yes*.

The marker group is deleted. The markers are no longer available to users.

## 3.6 General settings

Under > *Marketing Planner* > *Settings* > *General*, adjust the following settings:




### Display and export timelines in the budget view

Choose whether timelines are displayed in the budget view. If timelines are displayed, they are also included in the export.

### Display timeline name in calendar view

Choose whether the names of timelines are to be displayed in the calendar view. If the names are displayed, they are also included in the export.

### Width of the tree structure column

Define the column width for displaying the element tree in pixels.

### External ID

Enter a regular expression for the external ID. The external ID is used when budget-related data is imported.

### Save changes

Your changes come into effect only after you save and reopen the Marketing Planner.

### Search configuration

In certain situations, the search function in the dashboard may not provide the results you want. In such cases, you can initiate the reindexing process. Click *Start Reindexing* to start the operation.

## 3.7 Years for the Marketing Planner

You can use the Marketing Planner to create and carry out marketing plans both over and for multiple years. From a dropdown list located in the upper area of the window, you can change the year displayed in the calendar and budget views quickly and easily.

> **Note:** An application for a market development fund (MDF) is always dated to the current calendar year. If you use the *Market development fund* (MDF) function, the current calendar must therefore be entered for the planning in the Marketing Planner.

To create a new year, click *> Settings > Additional Years*.

**Planning type**

You must also decide which logic is used to calculate the individual budget values in the budget view. Click *> Settings > Additional Years* and define whether the budget values defined for the individual planning elements are totaled using the Top-Down Method or the Bottom-Up Method.

| Top Down | Bottom Up |
|---|---|
| Budget calculation using the top-down method is suitable for companies whose marketing planning is centralized and where the individual marketing areas use centrally defined budgets. | Budget calculation using the bottom-up method is suitable for companies whose individual marketing departments create their own budget plans and in which the total budget is not defined. |
| *Effects:*<br>• Only one valid exchange rate is defined for the entire year.<br>• "Horizontal" automatic totals (the total of the monthly budgets) are deactivated. | *Effects:*<br>• Exchange rates can be defined for each month. Changes are taken into account during recalculation.<br>• "Horizontal" automatic totals (the total of the monthly budgets) are activated.<br>• The annual budget total is calculated from the individual monthly values. |

#### Changing the planning type

A picklist lets you choose between the Top-Down Method and the Bottom-Up Method logic for budget calculation. When you switch from the Top-Down to the Bottom-Up Method, note the following:

- "Horizontal" automatic totals (the total of the monthly budgets) are activated automatically.

When you switch from the Bottom-Up to Top-Down Method, note the following:

- "Horizontal" automatic totals (the total of the monthly budgets) are deactivated automatically.

> **Note:** You have to log in again to apply the changed logic for the budget calculation and to reload the views.

#### Adopting the exchange rates based on the planning type

Depending on the setting that you select, exchange rates for new years can be adopted as follows:

- For the budget calculation using the Top Down method, an applicable exchange rate for the whole year is defined. If the budget for the previous or subsequent year is calculated using the Top Down method, the new year adopts the applicable exchange rate. You can edit the adopted exchange rate at a later stage.
- For the budget calculation using the Bottom Up method, you can define exchange rates for each month. If the budget for the previous or subsequent year is calculated using the Bottom Up method, the new year adopts the exchange rate for the relevant month in the starting year for all the months. You can edit the adopted exchange rate at a later stage.

### 3.7.1 Creating a new year

You want to create a new year for your marketing plan.

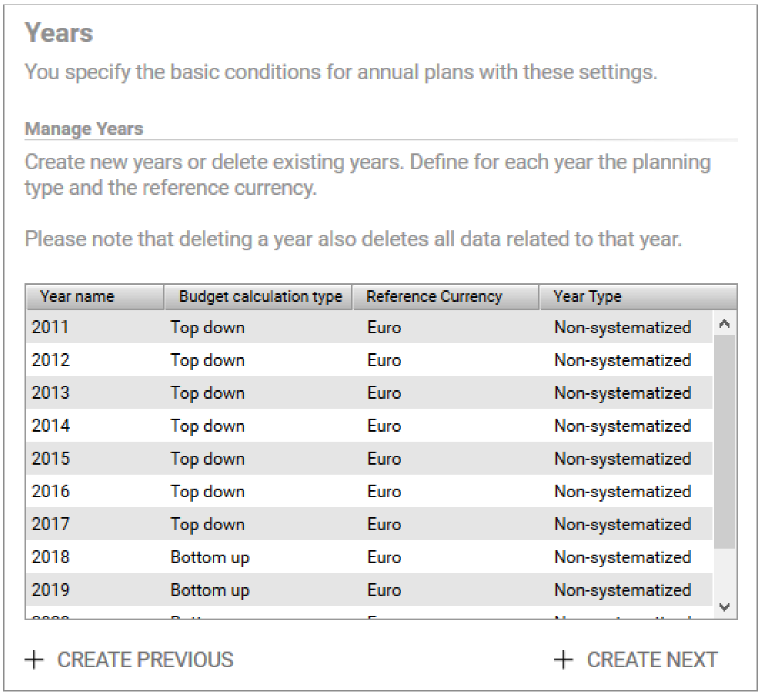
1. Choose > *Settings* > *Years*.
2. Choose *Create Next*.

A dialog box opens.

3. Choose:

- If you want to apply the exchange rates from the previous year, click *Yes*.
- If you want to create the exchange rates for this year, choose *No*.

You have created a new year based on the last created year.



### 3.7.2 Restoring a year name

You want to restore the original name of a year.

**Note:** By default, the name of a year is provided as the number of the year written in digits (for example, 2014).

1. Choose > *Settings* > *Years*.

This opens the table overview of the years that have already been created.

2. Click the table line for the year whose original name you want to restore.

This activates the input screen.

3. Click the rotating *arrows* icon.

You have restored the original name for the selected year.

### 3.7.3 Defining a planning type

You want to specify that the budget is calculated using the Top-Down or Bottom-Up method.

1. Choose > *Settings* > *Years*.
2. Click the year for which you want to define the logic of the budget calculation:

- Select *Top down* from the picklist to work with budget values defined centrally.
- Select *Bottom up* from the picklist to work with budget values that marketing departments can define themselves.

3. Click the *checkmark* to confirm your entry.

You have defined the plan type for the selected year.

**Note:** You have to log in again to apply the changed logic for the budget calculation and to reload the views.

### 3.7.4 Defining the starting month for the fiscal year

You can set the starting month for a fiscal year to be different to January as part of the introduction to the Marketing Planner module.

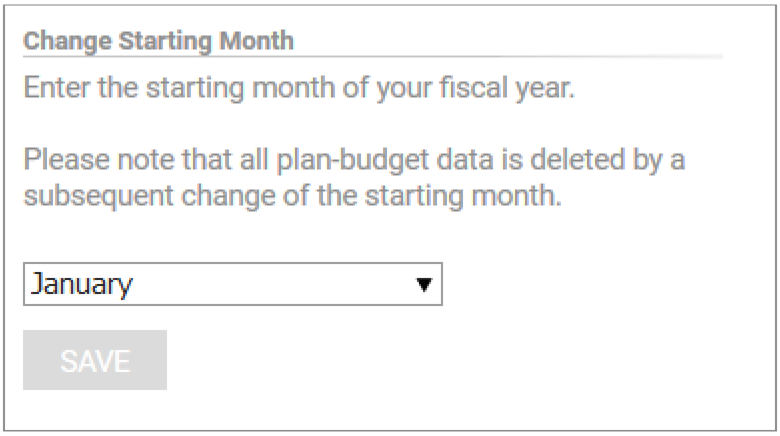
**Prerequisites**

No planning elements or other data have been created.

**Step by step**

1. Choose > *Settings* > *Additional Years*.
2. In the *Change starting month* area, select the month in which you want the fiscal year to begin from the dropdown list.
3. Choose *Change starting month*.

You have changed the starting month for the fiscal year. You can no longer change the starting month once you add data to the Marketing Planner.




If you would like to track the starting month for your fiscal year at a later point, make a note of the text under *Settings* > *Years* > *Edit Years*. This text specifies the starting month of your fiscal year.

## 3.8 Dimensions

You can use dimensions to assign configurable types to individual planning elements. A dimension can map criteria such as target groups, target markets, groups in which you participate, or product lines, for example. You can search and filter according to dimensions. You can also compare dimensions with each other in reports. You can:

- sort views according to dimensions,
- generate KPI benchmark reports based on dimensions,
- take dimensions into account when copying an element,
- restrict the visibility of dimensions to specific user groups,
- inherit dimensions from an element to a sub-element,
- define dimensions as mandatory.

### 3.8.1 The "Dimensions" tab

You access the page for configuring the dimensions by choosing > *Settings* > *Dimensions*:

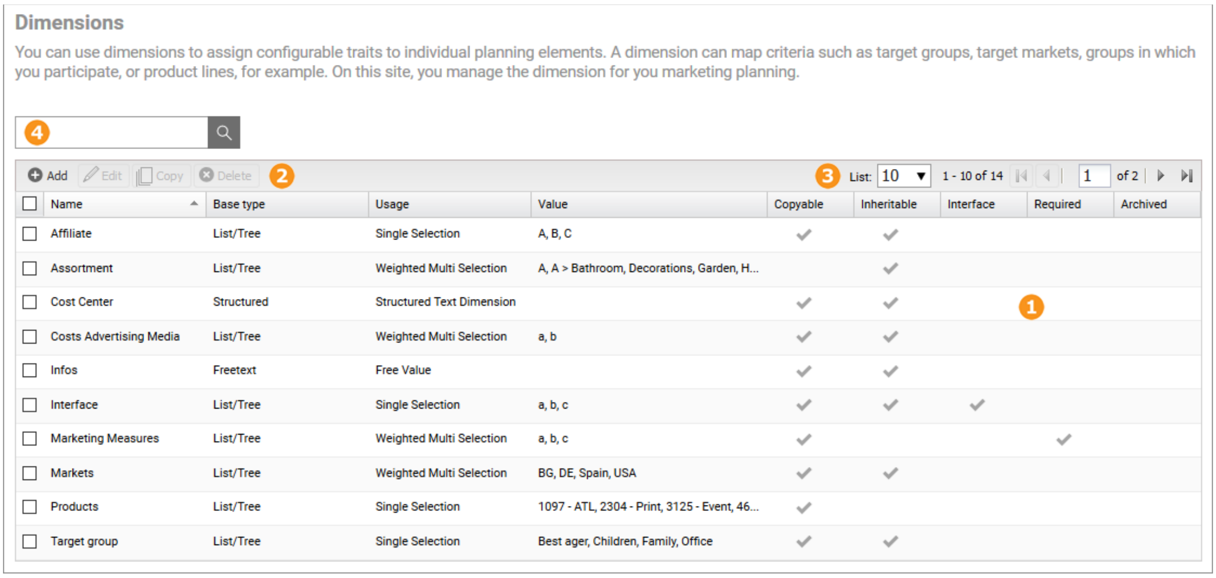
**Structure**

The table displays all the dimensions that have been created already (1). You can use the *Add*, *Edit*, *Copy*, and *Delete* buttons to edit the overall state of the dimensions (2).

> **Note**
>
> Note that you can no longer delete a dimension value during editing once the value is assigned to a planning element.

Use the selection list on the right above the table to set how many dimensions are displayed per page (3). Use the arrow keys to navigate through a table with multiple pages.

If you have an extensive number of dimensions, you can carry out a full-text search in the search fields above the table using the dimension names (4). The table then displays the search result.




| Name | Base type | Usage | Value | Copyable | Inheritable | Interface | Required | Archived |
|---|---|---|---|---|---|---|---|---|
| Affiliate | List/Tree | Single Selection | A, B, C | ✓ | ✓ | | | |
| Assortment | List/Tree | Weighted Multi Selection | A, A > Bathroom, Decorations, Garden, H... | | ✓ | | | |
| Cost Center | Structured | Structured Text Dimension | | ✓ | ✓ | | | |
| Costs Advertising Media | List/Tree | Weighted Multi Selection | a, b | ✓ | ✓ | | | |
| Infos | Freetext | Free Value | | ✓ | ✓ | | | |
| Interface | List/Tree | Single Selection | a, b, c | ✓ | ✓ | ✓ | | |
| Marketing Measures | List/Tree | Weighted Multi Selection | a, b, c | ✓ | | | ✓ | |
| Markets | List/Tree | Weighted Multi Selection | BG, DE, Spain, USA | ✓ | ✓ | | | |
| Products | List/Tree | Single Selection | 1097 - ATL, 2304 - Print, 3125 - Event, 46... | ✓ | | | | |
| Target group | List/Tree | Single Selection | Best ager, Children, Family, Office | ✓ | ✓ | | | |

## Adapt

To adapt the table to your requirements, you have the following options. The settings are saved for each user and can be adjusted again at any time.

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

### 3.8.2 Dimension types

You can use multiple categories of dimensions with different types.

**Note:** The type of a dimension can no longer be changed once the dimension has been rated for an element. You must remove all the ratings in order to delete the dimension.

#### List/Tree type

With this type, the user chooses one or more predefined values. The values can be arranged as a list or in a tree structure (max. 5 levels).

| Attribution | Description |
|---|---|
| *Single Selection* | The user chooses one value. |
| *Multiple Selection* | The user chooses one or more values. |
| *Weighted Multi Selection* | The user chooses one or more values. The user also chooses the percentage weighting for the values. |

#### Structured type

With this dimension type, the user has to enter a value whose structure matches the regular expression defined by you. This type can be used when entering a cost center, for example.

#### Free Value type

With this dimension type, the user enters free values.

| Attribution | Description |
|---|---|
| *Free Value* | The user edits a single-line free text field. |
| *Continuous Text* | The user edits a multi-line free text field. |

### 3.8.3 Attributes

Dimensions have the following attributes:

- *Copyable*: This checkbox controls the behavior of a dimension with a value when an element is copied (see *Copying and pasting an element* on page 85). If a dimension is copyable, its value is also copied and pasted for a new element when this element is copied. If the dimension is not copyable, it is not filled in for the element.
- *Inheritable*: If a dimension is inheritable, the values entered for the element are transferred to all of the sub-elements once. Inherited values are flagged with a chain icon. You can still edit the sub-elements. Changes to parent elements no longer have an effect after this first entry.
- *Interface*: Activate this checkbox if the dimension is filled via an interface. In this case, the dimension is visible but cannot be edited manually.
- *Required*: Activate this checkbox if the dimension must be filled for each element. If a required dimension is not edited, the system notifies you of this on the *Dimensions* tab in the detail view of a planning element:
  - With a warning triangle in the first column.
  - With an information message below the list.
- *Archived*: If you no longer use a dimension, activate this checkbox. Archived dimensions continue to be listed in the detailed view of a planning element but cannot be edited.

> **Note:** Note that an archived dimension cannot be copyable, inheritable, or selected as a required dimension at the same time.

### 3.8.4 Creating a "Structured" type

You want to create a structured text field to ensure that cost centers are always entered in the predefined format XX-123.4567_8X0 in the input field.

1. Choose > *Settings* > *Dimensions*.
2. Choose *Add*.

This activates the input screen.

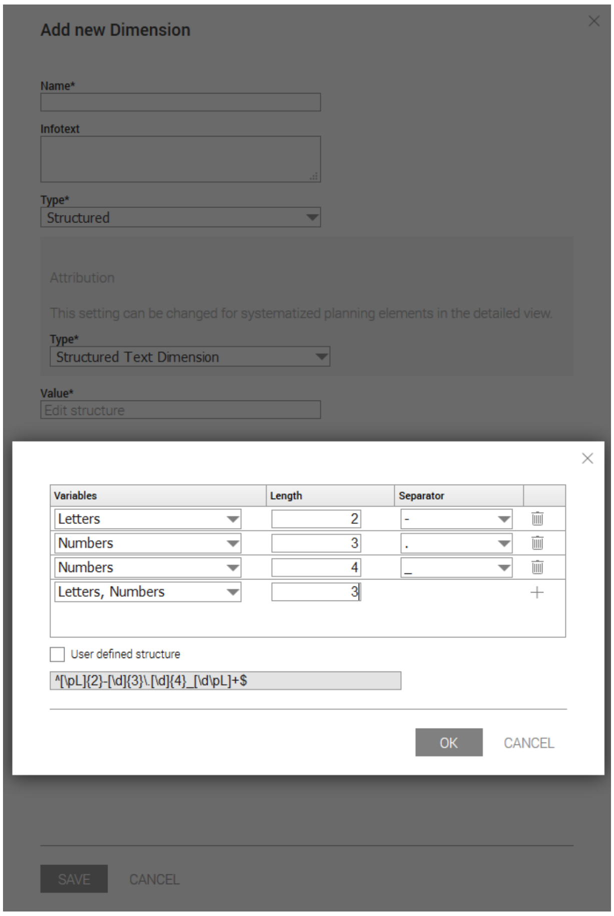
3. Enter a name.
4. If necessary, enter information text. Use the formatting functions to display complex descriptions clearly.
5. From the *Type* dropdown list, select the entry *Structured*.
6. Click *Edit structure* in the *Value* field.

This opens an input screen in which you define the structured text dimension.

7. Select *Letters* as the variable.
8. In the *Length* column, enter the value `2`.
9. Click the *Plus sign* to display the *Separator* column and a second input field.

10. Select a dash (–) from the *Separator* selection list.
11. Select *Numbers* as the variable for the second input field.
12. In the *Length* column, enter the value 3.
13. Click the *Plus sign* to display the *Separator* column and a third input field.
14. Select a period ( . ) from the *Separator* selection list.
15. Select *Numbers* as the variable for the second input field.
16. In the *Length* column, enter the value 4.
17. Click the *Plus sign* to display an additional input field.
18. Select an underscore (_) from the *Separator* selection list.
19. Select *Letters, Numbers* as the variable for the fourth input field.
20. In the *Length* column, enter the value 3.
21. Choose *OK* to confirm your entries.
22. Edit the attributes.
23. Choose which groups have access to the dimension.
24. Click *Save*.

You have created a dimension with a structured text dimension, in which users can enter a cost center in a predefined format only.



### 3.8.5 Creating the "List/Tree" type

You want to create a *List/Tree*-type dimension with the attribution *Weighted Multi Selection*. You want the *Advertising Material - Projected Budget* dimension to display the selected advertising materials and the resulting percentage projected budget utilization. The advertising materials are structured as follows:

- Giveaways
  - Cups
  - Key rings
- Print
  - Flyers
  - Brochures
- Presentation
  - Display stands
  - Banners

1. Choose > *Settings* > *Dimensions*.
2. Choose *Add*.

This activates the input screen.

3. In the *Name* input field, enter the name of the dimension: `Budgetbelastung Werbemittel`.
4. From the *Type* dropdown list, select the entry *List/Tree*.
5. Select the entry *Weighted Multi Selection* from the *Attribution* dropdown list.
6. Click *Add value at top level*.
7. Enter *Giveaways* in the field that opens.
8. Click in the *Giveaways* line.

A lower-level field opens.

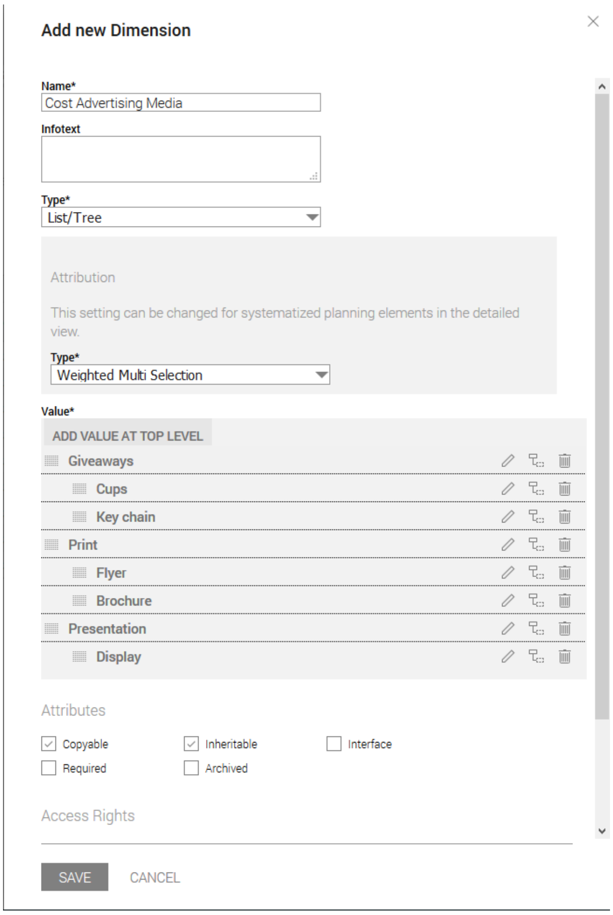
9. Enter *Cups*.
10. Choose .
11. Click in the *Giveaways* line.

A lower-level field opens.

12. Enter *Key rings*.
13. Choose .
14. Repeat steps 6 to 13 to create all of the advertising material in the structure required.
15. Edit the attributes.
16. Choose which groups have access to the dimension.

17. Click *Save*.

You have created the dimension *Advertising Material - Projected Budget* as a weighted multi-selection.



## 3.9 KPIs

You can use a KPI to rate the success of your measures.

### 3.9.1 The "KPIs" tab

You can access the page for configuring KPIs by choosing > *Settings* > *KPIs*.

**Structure**

The table displays all KPIs that have already been created (1). You can use the *Add*, *Edit*, and *Delete* buttons to edit the overall state (2). Use the selection list on the right above the table to set how many KPIs are displayed per page (3). Use the arrow keys to navigate through a table with multiple pages.

If you have an extensive number of KPIs, you can carry out a full-text search in the search fields above the table using the KPI names (4). The table displays the search result.

You enter the global value for the status borders above the table navigation (5). You can define the percentages for the traffic light control system:

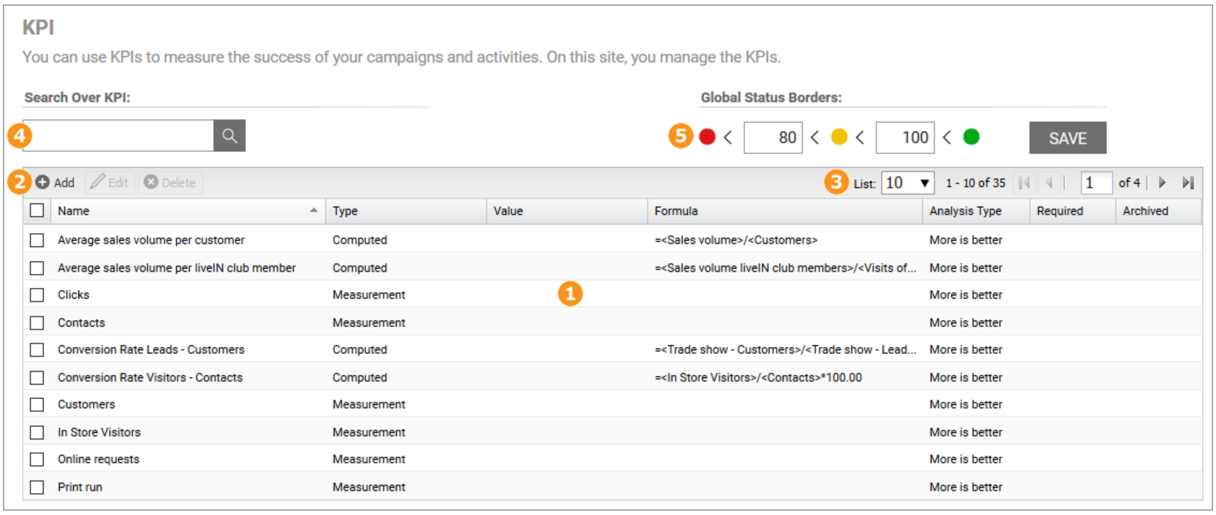
- The percentage value below which the red light is triggered
- The percentage value at which the green light is triggered

The values between your entries are flagged with a yellow traffic light. You can adjust the status borders individually for each created KPI.
The global value is used at two points:

- When you create a KPI, you can apply the global value for the status borders of this KPI.

> **Note:** Note that this does not set up a permanent link between the global value and the status borders of this KPIs: If you change the global value at a later stage, the individual status borders of the KPI are not changed.

- In the detailed view of an element, the total results achieved for all of the KPIs of the element are displayed on the *KPIs* tab below the table. The global value for status borders are used for the color display of the target achieved.




## Adapt

To adapt the table to your requirements, you have the following options. The settings are saved for each user and can be adjusted again at any time.

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

### 3.9.2 Creating a KPI

When you choose *Add* in > *Settings* > *KPIs*, the *Add* dialog box opens. This dialog box contains the following fields:

| Name | Description |
|---|---|
| *Name* | Define the name with which the KPI is displayed in the detailed view. |
| *Infotext concerning weight, target and value* | Provide users with assistance by describing how they should process the KPI. |
| *Type* | **Note:** the KPI type can only be changed if the KPI has not been used on a planning element.<br>Define how the values for the KPI for the element are to be created:<br>• *Measurement*: This value is entered by the user.<br>• *Computed*: This value is calculated using the specified formula.<br>• *Constant*: the value is preset for the KPI. A constant KPI cannot be added to an element; instead, it is used to calculate other KPIs. The following constants from the budget plan can be used in the default setting: planned, target, committed, actual, projected, remaining, and MDF. The values in this case relate to the element for which the KPI is calculated. |
| *Formula* | **Note:** This is visible only if the *Type* is *Computed*.<br>Define the formula that is used to calculate the KPI value for the *Calculated* type. You can use the following characters for the calculation operations:<br>• * for multiplication<br>• / for division<br>• + for addition<br>• - for subtraction<br>• () parentheses<br>You can use created KPIs or system KPIs for the formula. System KPIs correspond to the *Planned*, *Target*, *Committed*, *Actual*, *Projected*, *Remaining*, and *MDF* columns. The system KPIs are calculated as a total of the values from the years for which the KPI is calculated. |

| Name | Description |
|---|---|
| *Analysis type* | You can define how the values stored for the status borders are interpreted in relation to the traffic light control system.<br>• *More is better*: You can specify that you want the actual value to be higher than the target value so that higher values (for the total number of visitors, for example) are displayed with the green traffic light color.<br>• *Less is better*: You can specify that you want the target value to be higher than the actual value so that lower values (for returns rates or costs, for example) are displayed with the green traffic light color. |
| *Required* | You can define whether the KPI has to be used for each element of the tree structure. You can only flag the types *Computed* and *Measurement* as required.<br>**Note:** Note that a KPI cannot be archived and a mandatory KPI at the same time. |
| *Archived* | This determines whether the KPI is to be archived. You can only archive the types *Computed* and *Measurement*.<br>**Note:** Note that a KPI cannot be archived and a mandatory KPI at the same time. |
| *Status borders* | You can define the percentages for the traffic light control system:<br>• the percentage value below which the red light is triggered,<br>• the percentage value at which the green light is triggered.<br>The values between your entries are flagged with a yellow traffic light. You can adjust the status borders individually for each created KPI. If you choose *Set from global*, you copy the value that you entered in *> Settings > KPIs*.<br>**Note:** Note that this does not establish a permanent link between the global value and the status borders of this KPIs: If you change the global value at a later stage, the individual status borders of the KPI are not changed. |
| *KPI Sets* | You assign the KPI to a set. You can group several KPIs together to form a KPI set. When you assign a KPI set to a planning element, you assign the entire KPI group along with it.<br>Create a set by entering a set name in the input field and pressing Enter. To assign a KPI to an existing set, select the relevant entry from the drop-down list. |

### 3.9.3 Example: Creating the KPI "Lead Conversion Rate"

The lead conversion rate shows what percentage of the total visitors to a website have carried out a specific action (for example, made a purchase or an inquiry). You want to calculate the lead conversion rate using the following formula:

- `(<Anzahl Kontaktanfragen>/<Anzahl Besucher>)*100`

To create the KPI `Lead Conversion Rate`, you also require the KPIs `Anzahl Kontaktanfragen` and `Anzahl Besucher.`.

> **Note:** Constant KPIs and measurements can be used for the calculation of other KPIs. In the formula, the names of the KPIs that are used are placed in angle brackets ("<" and ">").

1. Click > *Settings* > *KPIs*.
2. Choose *Add*.

The *Add new KPI* dialog box opens.

3. Enter `Anzahl Kontaktanfragen` in the *Name* input field for the KPI.
4. From the *Type* dropdown list, select the entry *Measurement*.
5. From the *Analysis type* dropdown list for the *application*, select the entry *More is better*.
6. Click *Save*.

The dialog box closes.

7. Choose *Add*.

This activates the input screen.

8. Enter `Anzahl Besucher` in the *Name* input field for the KPI.
9. Repeat steps 4 to 6.
10. Choose *Add*.

The *Add new KPI* dialog box opens.

11. Enter `Lead Conversion Rate` in the *Name* input field for the KPI.
12. From the *Type* dropdown list, select the entry *Computed*.
13. Enter the information required for the calculation in the *Formula* field:

- `<Anzahl Kontaktanfragen>/<Anzahl Besucher>*100`

> **Note:** As soon as you enter an opening angle bracket in the input field, you can select the KPI that you require from the dropdown list that opens.

14. From the *Analysis type* dropdown list, select the entry *More is better*.
15. Click *Save*.

This closes the input screen and the calculated KPI `Lead Conversion Rate` has been created.

### 3.9.4 Creating a KPI set

You can group several KPIs together to form a KPI set. When you assign a KPI set to a planning element, you assign the entire KPI group along with it.

1. Click *> Settings > KPIs*.
2. Choose:

- If the KPI has not been created: Click *Add*. Edit the fields in the dialog box as described in *Example: Creating the KPI "Lead Conversion Rate"* on page 70.
- If the KPI has been created: activate the checkbox in the first column of the KPI and click *Edit*.

3. Select the following in the *KPI Sets* area:

- To assign a KPI to an existing set, select the name of the set from the drop-down list.
- To assign the KPI to a new set, enter the name of the new set into the drop-down list and press Enter.

4. Click *Save*.

The KPI has now been assigned to a *KPI set*.

**Note**

For an overview of the KPI sets to which a KPI is assigned under *Marketing Planner > Settings > KPIs*, display the column *KPI Sets*. For information about displaying a column, please refer to the "KPIs" tab on page 66.

## 3.10 Exchange rate & Currencies

You can work with multiple currencies in the Marketing Planner. This simplifies the international budgeting process and increases transparency in budget and cost planning. You can switch between the reference currency and working currencies whenever you need to in the budget view. This lets you compare campaigns planned for countries with different currencies with a single click.

You can define a currency

- as a reference currency for an entire year,
- as a working currency for a planning element.

Exchange rates can be used to convert one currency to another. Specify the exchange rates for converting between the currencies and the reference currency. Please note that the reference currency is defined for each year.

**Attention!**

If you delete the reference currency for a selected year, all exchange rates for that year are deleted. The deletion cannot be undone.

### 3.10.1 Creating an exchange rate

You can use created currencies as either a reference or working currency. You create exchange rates to enable the conversion of budget values into the working currency in relation to the reference currency.

**Prerequisites**

- You have created at least two currencies.
- You have defined a reference currency.

**Step by step**

1. Click *Settings > Exchange Rate & Currencies.*
2. From the *Date* dropdown list, select the year for which you want to create an exchange rate. You can only select years with a defined reference currency.
3. Click *Add new exchange rate*.

This activates the input screen.

4. Select the pivot currency from the *Currency* selection list.
5. Select one of the defined values from the *Units* picklist. You can choose from the entries *1*, *10*, *100*, *1000*, *10000*, or *100000*.
6. Define the exchange rate in the *Rate* field.

**Note:** You can enter an exchange rate with any number of decimal places. However, the exchange rate is always rounded to only four decimal places and then saved. For an exact calculation, enter the rate and unit increased by the

same power of ten.
Example: Your exchange rate is 0.0143575 and the unit is 10. To receive a rate with four decimal places, you require the factor 1000. Therefore, enter the rate 14.3575 and the unit 10000.

7. Click the *checkmark* to confirm your entries.

You have created an exchange rate for the selected pivot currency. The budget values defined in the working currency can be converted to the reference currency based on the exchange rate.

**Note:** When you create an additional year, existing exchange rates can be adopted automatically.

### 3.10.2 Creating a currency

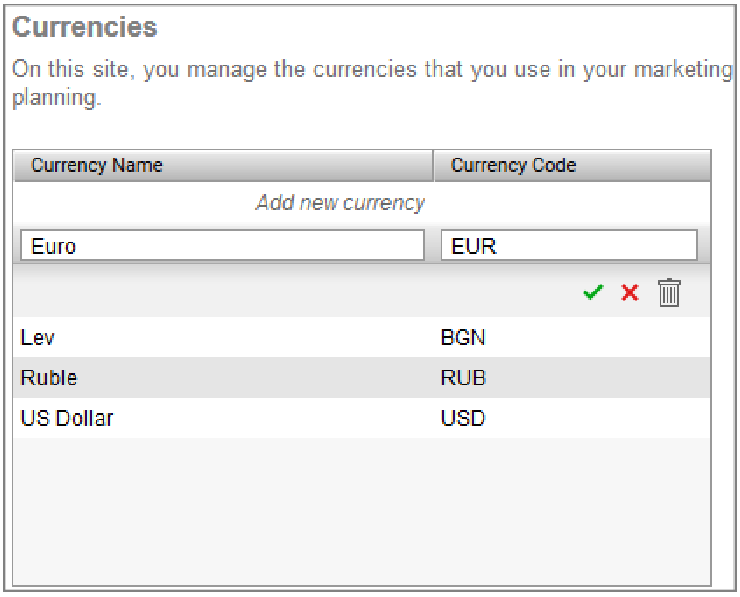
1. Click *Settings > Exchange Rate & Currencies*.

This opens a table with an overview of the currencies.

2. Click *Add new currency*.
3. Define the *Currency name* and the *Currency code*.
4. Confirm your entries by clicking the *checkmark*.

You have created a currency and can define this currency as a reference currency for a year or as a working currency for a planning element. In the budget view, you can choose whether the *Currency Column* displays the working or reference currency.

If you want to delete a currency, select it in the list and then click the *Recycle Bin* icon.



### 3.10.3 Defining the Working Currency

You want to define a working currency that differs from the reference currency for the individual planning elements in your marketing plan.

**Prerequisites**

You have created at least one currency under > *Settings* > *Exchange Rate & Currencies*.

**Step by step**

1. Open the detailed view of the planning for which you want to define the working currency.
2. Click the *Edit general element info* button in the *Quick Actions* column.

   The *Edit general element info* dialog box opens.
3. Select the created currency that you want to define as the working currency for the plan element from the *Working currency* selection list
4. Choose *Save* to confirm your selection.

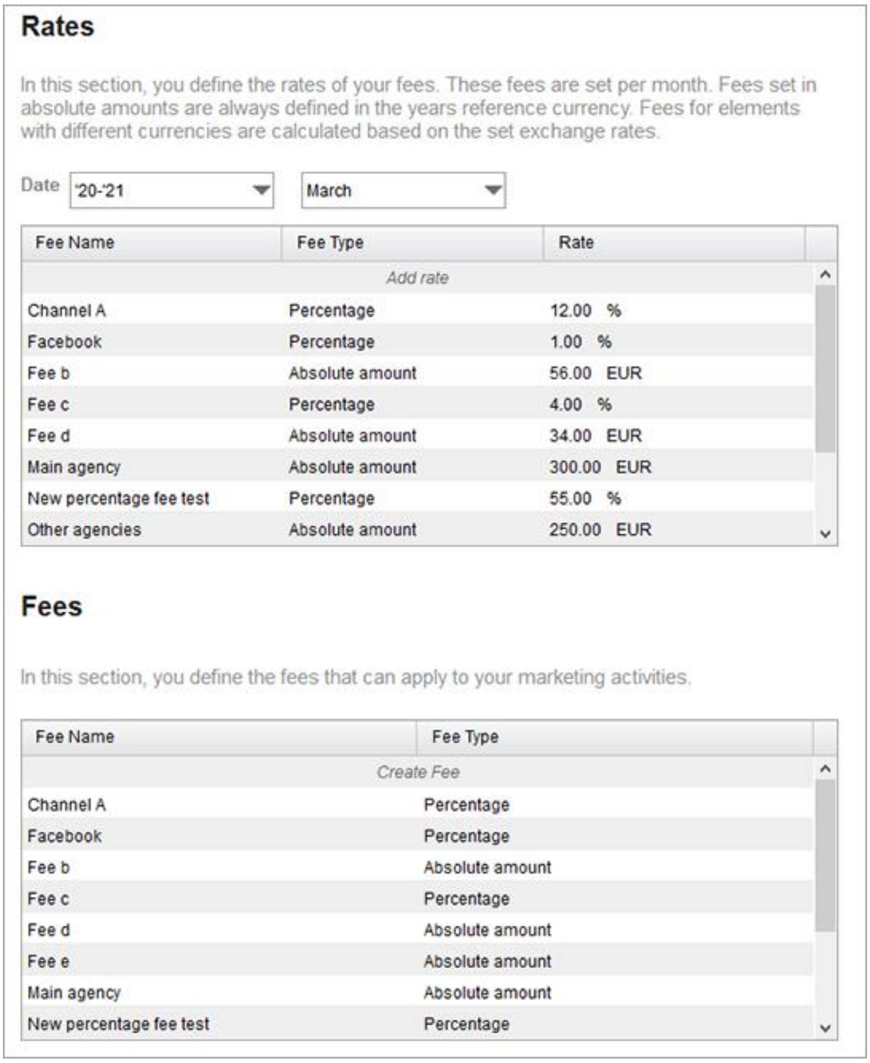
You have defined a working currency for the selected planning element and can plan the marketing measures in a currency that differs from the reference currency. The working currency is inherited automatically by the sub-elements. In the budget view, you can choose whether the *Currency Column* displays the working or reference currency.

> **Note:** You cannot define a working currency for the first element of your marketing plan (that is, the highest node).

# 3.11 Fees

Fees are percentage or absolute amounts that are incurred as costs for activities in specific channels. Flagging these fees lets you create a net requirements plan.

As an administrator, you can configure fees globally under > *Marketing Planner > Settings > Fees*. You enter the amount of the fees for each month on the same page.




### Associated tasks

- Creating a fee (see chapter 3.11.1)
- Editing a fee (see chapter 3.11.2)
- Defining the fee amount (see chapter 3.11.3)
- Deleting a fee (see chapter 3.11.4)

### 3.11.1 Creating a fee

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. In the *Fees* section in the table, click the line *Create Fee*.

   The line switches to edit mode.
3. In the field on the left, enter the fee name.
4. In the field on the right, select the fee type from the dropdown list (*Percentage* or *Absolute amount*).
5. Click the checkmark below the dropdown list.

Editing mode is ended for the line. You have created the fee.
Note that you have not defined a fee rate yet. To define the fee rate, follow the instructions in chapter 3.11.3.

### 3.11.2 Editing fees

**Note**

When you edit a fee, you can change the name and fee type. Note that any change of name or type is applied to all the months. For example, a fee cannot be a percentage in one month and an absolute amount in the next month. Only the fee rate can vary from month to month (see chapter 3.11.3).

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. In the *Fees* section in the table, click the line for the fee that you want to edit.

   The line switches to edit mode.
3. If necessary, change the fee name and fee type.
4. Click the checkmark below the dropdown list.

   A security prompt is displayed.
5. Choose *Yes*.

You have edited the fee.

### 3.11.3 Defining the fee rate

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. In the *Rates* section above the table, choose the year and month for which you want to define the fee rate.
3. In the table below it, click the line for the fee whose rate you want to define.

   The line switches to edit mode.
4. Enter the fee rate.
5. Click the checkmark below the input field.

Editing mode is ended for the line. You have defined the fee rate for the selected month.

**Note**

The first time that a fee rate is defined for a year, the value is automatically applied to all the months of the year.

### 3.11.4 Deleting a fee

**Attention!**

Note that you cannot reverse the deletion of a fee.

**Note**

Note that you can only delete fees that are not assigned to any elements.

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. In the *Fees* section in the table, click the line for the fee that you want to delete.

The line switches to edit mode.

3. Click the recycle bin icon below the dropdown list.

A security prompt is displayed.

4. Choose *Yes*.

You have deleted the fee.

## 3.12 Synchronization with the Digital Marketing Center

You can use the *Digital Marketing Center* (DMC) module to plan digital campaigns and play them out in the relevant channels. The DMC provides interfaces for leading tools and platforms such as Google Ads or Facebook Business Manager.

To enable the use of the Marketing Planner as your central tool, you can assign resources from the Digital Marketing Center to the planning elements (see chapter 7.7). Such an assignment allows data such as KPIs to be exchanged directly between the modules and assigned to the correct element. You choose which data is to be exchanged in the Digital Marketing Center. If you have any questions, please contact your system administrator.

In addition, the following conditions must be fulfilled to use this function:

- The Digital Marketing Center must be activated in your system. If you have any questions, please contact your BrandMaker contact person.
- Under *> Administration > System Configuration > System Settings*, the URL of the Digital Marketing Center whose resources you want to assign must be entered in the *External resources URL* system setting.
- The users who want to assign the resources to the elements require the right MAPS_ELEMENT_EXTERNAL_RESOURCES.

# 4 Planning marketing measures

You want to display all the marketing measures for a year and plan their content. The measures are created as planning elements arranged in a hierarchical tree structure.

You define the tasks for the various measures at the planning stage. You also plan the schedules for the measures, define the planned costs, and allocate the tasks.

To plan your marketing measures, you must:

- Build and edit the tree structure for your marketing plan
- Create timelines for planning elements
- Create and allocate tasks
- Enter additional information for elements

## 4.1 Planning elements

Planning elements are the individual parts of your marketing plan. Thanks to the hierarchical setup of the tree structure, planning elements can, for instance, map structures such as Campaigns - Projects - Channels or National subsidiaries - Products - Campaigns.

**Watching elements**

Every user with access to detailed view can watch planning elements. A watcher is informed via e-mail when the element's following information change:

- General information (*General* tab in detailed view)
  Changes of assigned user groups and in Content Enrichment are excluded.
- Target budgets
- Timelines
- POs
- Invoices
- Marketing development funds
- Planned budget
- Tasks
- Dimensions
- KPIs
- Attachments
- Comments

You get an overview of your watched planning elements in the new dashlet My Watched Elements, see chapter 2.1.

If your user role has the appropriate authorization, you can edit the watchers of an element, i.e. add or delete users as watchers.

The following chapters explain how to manage the watching of an element:

- Starting to watch an element, see chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**
- Stopping to watch an element, see chapter 4.1.11
- Editing watchers of an element, see chapter 0

**Creating elements in a filtered view**

You can create elements in a filtered view and thus prefill the new element with the filter's values. This applies when filtering to the following properties:

- Dimensions
- Responsible person
- Marker
- Currency
- Fees

The following properties cannot be prefilled:

- Element type
- Start date
- End date
- Category
- Tree level
- Element name
- Leafs

**Note**

You cannot create an element in a sorted view.

It may be possible that the automatic prefilling cannot be performed, for example if the filter contains several values for a property to be filled with one value. In this case you can select one or more properties in the *Create Element* dialog.

The Create Element dialog also lists the following information:

- List of properties that are prefilled.
- List of properties that are included in the filter, but which cannot be prefilled.
- List of properties that cannot be prefilled because the user does not have the necessary write permissions in the details view, for example on the *Dimensions* tab.

- Whether the new element may not be shown in the currently filtered view, for example because the filter contains exclusion criteria.

**Content Enrichment**

If the *Content enrichment* function is activated in your system, you can enrich elements with information about the respective marketing activities. When such content is added to a planning element, you can display the information by choosing the element context menu and then > *Additional Information*:


For information about enriching a planning element with additional information, see the chapter Enriching an element with additional information on page 90. For more information about content enrichment, see the chapter Content enrichment on page 112.

**Functions in the context menu**

Right-click a planning element to open a context menu with the following functions:

| Function | Description |
|---|---|
| *Details* | This opens the detailed view of the selected planning element. |
| *Edit* Job | **Note:** Only available if the planning element was created using a job in the Job Manager.<br><br>You open the data sheet for the job that created the planning element. Note that you need appropriate access rights to view or edit details of the data sheet. When you close the data sheet, you are in the Marketing Planner. |
| *Additional Information* | **Note:** Available only if additional information is added to the planning element.<br><br>You open the additional information in an additional dialog box. |

| Function | Description |
|---|---|
| *Rename* | This changes the name of the selected planning element. |
| *Add marker* | You can add a marker to the selected planning element. |
| *New Element XXXX* | This creates a new planning element. Instead of XXXX, the level name is displayed; you can use this level name to identify the hierarchical position within the tree structure. If element types have been created, you can select an element type in a submenu.<br>**Note:** You cannot create an element in a sorted view. |
| *New Subelement XXXX* | This creates a new sub-element. Instead of XXXX, the name that is currently used for the subelement level is displayed; you can use this name to identify the hierarchical position within the tree structure. If element types have been created, you can select an element type in a submenu.<br>**Note:** You cannot create an element in a sorted view. |
| *Sort Elements* | **Note:** Not for the root element.<br>You can sort the sub-elements of the element for which you call the function:<br>• *Sort ascending*: Sort the items from 0 to 9 and from A to Z.<br>• *Sort descending*: Sort the items from X to A and from 9 to 0. |
| *Expand sub-elements* | **Note:** Not available in a sorted view.<br>All the sub-elements of the planning element are expanded. |
| *Cut* | This copies the entire planning element, including its sub-elements, to the clipboard and deletes it from the tree structure. |
| *Copy* | This copies the planning element to the clipboard. In the dialog box that opens, you can specify which attachments (timelines, tasks, file attachments, or invoices, for example) are to be copied with it. |
| *Paste* | This adds a cut or copied planning element to the tree structure. |
| *Move* | You move the element within the tree structure by holding down the left mouse button. A guiding line displays the new position of the element. In the dialog box that opens when you release the mouse button, you can specify whether the element is to be created as a sub-element or a new element. |
| *Delete* | This deletes the selected element. |
| *Link to element* | This opens a dialog box in which you can copy the link to the selected planning element to the clipboard. You can then send the link to other users by e-mail, for instance. Note that you receive a link to the calendar if you click an element in the calendar. If you click an element in the budget view, you receive a link to the element in the budget view. |

| Function | Description |
| --- | --- |
| *Send element by e-mail* | This sends the start and end dates for the timelines of the selected element in the iCalendar data format. You can select the recipient in the window that opens. |
| *Export Budget Data* | This exports the budget data for the element and – if necessary – the subelements. |

### 4.1.1 Creating an element

You want to create a planning element in the tree structure for your marketing plan.

**Prerequisites**

- You have created the names for the levels under *> Settings > Calendar*.
- You have created various element types under *> Settings > Element types*.

**Step by step**

1. Choose *> Calendar* in the upper navigation pane.

This switches to the *Calendar view*. The tree structure is loaded.

2. Open the context menu for the top planning element (Level 1) in the tree structure.
3. Choose *New subelement XXXX* and select an element type in the list displayed.

The *Create New Element* dialog is displayed.

4. Enter an element name.
5. Optional: Select an element type.
6. If you create the element in a filtered view: Select whether certain properties of the element are preset with values of the current filter. See chapter 4.1 for more information.
7. If you want a default value to be set, but cannot select values automatically, activate the desired values in the lower part of the dialog.
8. Follow any hints in the dialog.
9. Click *Create and open*.

You create a new element below the top element. The detail view is opened with the *General* tab.

10. Click the *Edit general element info* button in the *Quick Actions* column.

The *Edit general element info* dialog box will open.

11. If required, enter a

- *Name*: Change the name of the element.
- *Element type*: Change the element type.
- *Notes*: Store additional information as required.

- *Responsible Person*: Use the picklist to select a responsible person if required. Only users that have access to the element are displayed.
- *Duration*: Use the dropdown list to define the years for which the element is valid.
- *Working currency*: Select the currency in which the element is budgeted (planned, POs, invoices, etc.). If exchange rates have been created, you can display the budgeting for the element in the reference currency, allowing you to compare multiple elements.

> **Note:** You will be unable to change the working currency after entering budget the data for the element (e.g. plan budget, invoices, POs, market development fund).

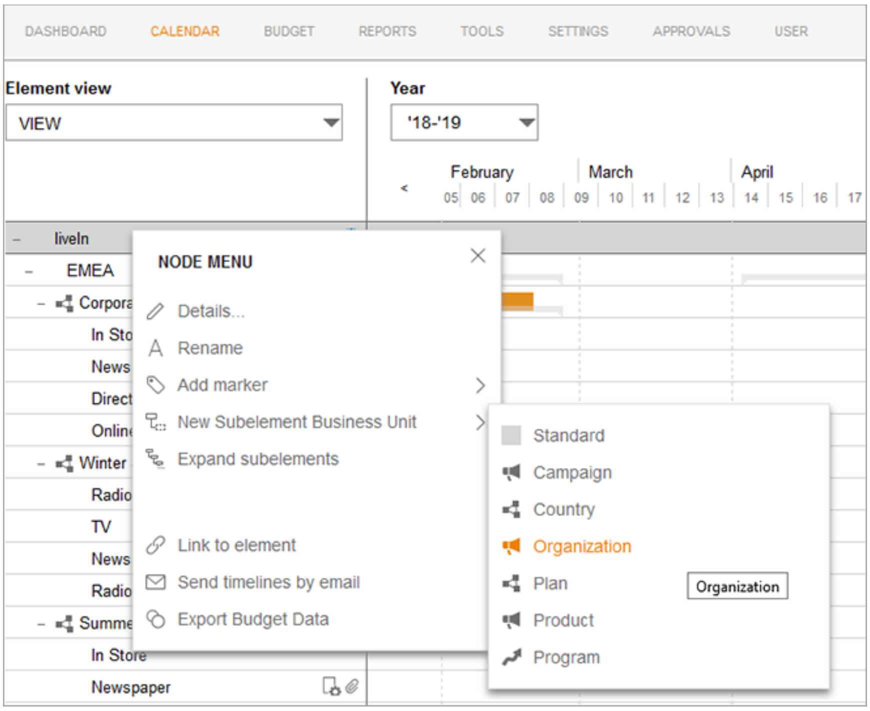
- *Markers*: Click *Add marker* to add a marker. You can use each marker once for an element.
- *External ID*: Enter an external ID. Note that you may only assign an external ID once because the element is controlled using the external ID when budget data is imported.
- *Element ID*: Displays the unique element ID that is created automatically when the element is created.
- *Groups*: Click *Edit*, to define which user groups can access the element.

12. Click *Save*.

The dialog box will close.

13. Choose *X*.

This closes the detailed view. The new element has been created according to your specifications.



### 4.1.2 Cutting and pasting an element

You want to cut one or more planning elements completely, including any sub-elements, from the tree structure and paste it in a different position.
Note that the runtimes of child elements must be the same as or within the runtime of the parent element. If you copy and paste elements to which this does not apply, you will be prompted to make an adjustment. Either you must lengthen the runtime of the parent element or shorten that of the child elements.

1. If you want to cut and paste multiple elements, select the elements:
   - Hold down the CTRL key and click the elements that you want to delete:
     All clicked elements will be selected.
   - Hold down the SHIFT key and click the first and last elements to be deleted:
     The first element, the last element, and all elements in between are selected.
2. Open the context menu for an element that you want to cut.
3. Select the *Cut* function.
4. Open the context menu for the element below which you want to paste the cut elements.
5. Click *Paste*.

The cut elements are pasted below the selected element, including the existing sub-elements.

### 4.1.3 Creating a new element on the same level

You want to create an additional new element on the same level.

**Prerequisites**

- The names for the levels are already created under > *Settings* > *Calendar*.
- You have already created a planning element.

**Step by step**

1. Open the context menu for the newly created element.
2. Choose *New Element*.

   This creates a new element that is added on the same level as the selected element.
3. Proceed as described in steps 4 to 13 of the chapter *Creating an element* on page 81.

The new element has been created according to your specifications.

### 4.1.4 Copying and pasting an element

You want to copy one or more elements completely, including its sub-elements, and paste it as new planning elements. While copying it, you want to specify which attachments (such as timelines, tasks, or file attachments, for example) are to be copied.
Note that the runtimes of child elements must be the same as or within the runtime of the parent element. If you copy and paste elements to which this does not apply, you will be prompted to make an adjustment. Either you must lengthen the runtime of the parent element or shorten that of the child elements.

1. If you want to copy and paste multiple elements, select the elements:

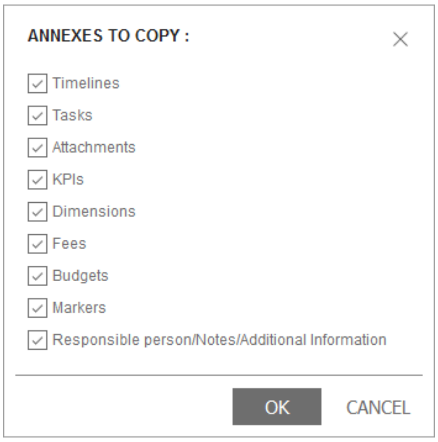
- Hold down the CTRL key and click the elements that you want to delete:
  All clicked elements will be selected.
- Hold down the SHIFT key and click the first and last elements to be deleted:
  The first element, the last element, and all elements in between are selected.

2. Open the context menu for an element that you want to copy.
3. Choose *Copy*.

This opens a new dialog box.

4. Specify which attachments are to be copied by activating the relevant checkboxes.

> **Note:** Only dimensions or dimension values for which the *Copyable* checkbox has been activated and that the user can access are copied.




5. Choose *OK* to confirm your selection.
6. Open the context menu for the element below which you want to paste the copied elements.
7. Click *Paste*.

The copies of the elements, including existing sub-elements and the selected attachments, are added below the selected element.

> **Note:** You cannot paste a copied element as a sub-element of itself. When you copy an element, a new element is created independently of the copy template.

### 4.1.5 Deleting an element

You want to delete a planning element from the tree structure.

**Attention!**

When you delete an element, all connected data such as invoices, attachments, and timelines in all valid years is lost. You cannot reverse the deletion.

1. Open the context menu for the element that you want to delete from the tree structure.
2. Choose *Delete*.
3. In the dialog box that opens, choose *Yes* to confirm the deletion.

The selected planning element has been permanently deleted from the tree structure.

### 4.1.6 Deleting multiple elements

You want to delete several planning elements from the tree structure.

**Attention!**

When you delete an element, all connected data such as invoices, attachments, and timelines in all valid years is lost. You cannot reverse the deletion.

1. Select the elements you want to delete.

- Hold down the CTRL key and click on the elements you want to delete:
  All clicked elements are marked.
- Hold down the SHIFT key and click on the first and last item to be deleted:
  The first element, the last element and all elements in between are selected.

2. Click with the right mouse button on one of the selected elements.

The context menu is displayed.

3. Click *Delete*.

A security prompt is displayed.

4. Click *OK*.

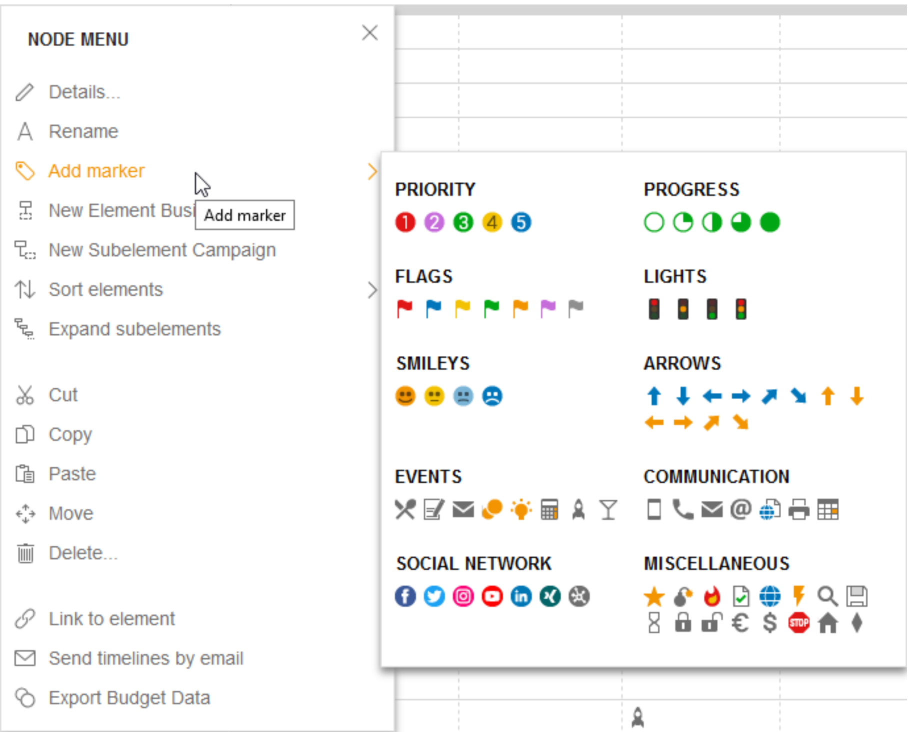
You have deleted the elements.

### 4.1.7 Selecting an element

You want to provide a marker for a planning element to, for example, indicate the priority of an activity or task.

1. Open the context menu for the element to which you want to add a marker.
2. Choose *Add marker*.
3. Select a marker icon from the available categories (Priority, Progress, Flags, Lights, Smileys, Arrows, Events, Communication, Social Network, and Miscellaneous).

The selected marker is displayed directly next to the element in the tree structure.



### 4.1.8 Moving an element

You want to move an element within the tree structure to place it in a different position.

1. Open the context menu for the element that you want to re-locate.
2. Choose *Move*.
3. Click the selected element using the left mouse button and hold the mouse button down.

You can then move the element up or down. A black line indicates the point in the structure where the element is to be placed.

> **Note:** You cannot move an element beneath itself, but you can move it beneath another element on the same level. When you move an element, any existing sub-elements are moved along with it.

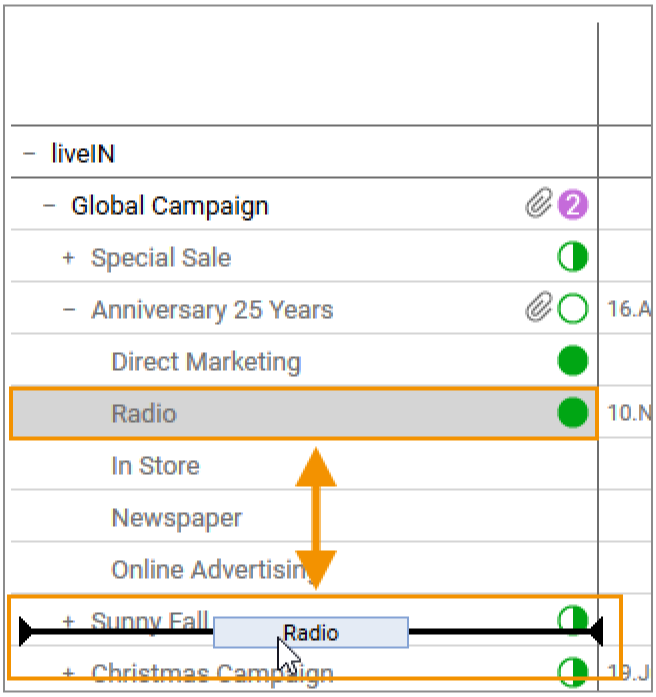
4. Release the mouse button to add the element at the selected position.

This opens a dialog box in which you can specify whether the element is to be added to the tree structure as a sub-element or as an element at the same hierarchy level.

5. Select from the options:

- *Yes*: This adds the element as a sub-element at the current position.
- *No*: This adds the element as an element on the same hierarchy level at the current position.
- *Cancel*: This terminates the process without moving the element.

You place the element at the selected position.



### 4.1.9 Enriching an element with additional information

1. Open the detailed view of the planning element to which you want to add additional information,
2. In the *Quick Actions* area, choose *Edit general element info*.

The *Edit general element info* dialog box will open.

3. Enter the content in the editor. For information about the editing options, see the chapter Content enrichment on page 112.
4. If you want the information to be directly accessible by other users with access to the element, activate the checkbox above the editor.

The text label of the box switches to *published*.

5. Click *Save*.
6. Choose *X*.

The details view closes. If you published the information, you can access the *Additional Information* function in the planning element context menu. You can use this function to open the additional information.

### 4.1.10 Starting to watch an element

1. Open the detailed view of the element you want to watch.
2. Click *Start watching* in the upper Quick Actions area.

You have started the watching of the element and will be informed by e-mail if changes are made. The planning element is also listed in your My Watched Elements dashlet.

### 4.1.11 Stopping to watch an element

1. Open the detailed view of the element whose watching you want to stop.
2. Click *Stop watching* in the upper Quick Actions area.

You have stopped the watching of the element.

### 4.1.12 Editing watchers of an element

1. Open the detailed view of the element whose watchers you want to edit.
2. Click on the number of watchers in the upper Quick Actions area.

A dialog opens in which you can enter new users as watchers and delete watchers that have already been entered.

3. Optionally: Add obserwatchers:

a. Click in the search line.

A list of all users with access to the element is opened.

b. If the list is too long, enter a name.

The list is reduced to matching users.

c. Select a user.

The user is entered in the list of watchers.

d. Repeat steps a to c if you want to add additional watchers.

4. Optionally: Remove watchers:

a. Click the trashcan icon for the user you want to remove as watcher.

The user is removed from the list of watchers.

b. If you want to remove additional users, repeat step a.

5. Close the dialog by clicking X in the upper right corner.

You have edited the watchers of the element.

## 4.2 Timelines

In the Marketing Planner, you can display the marketing activities for a year in a clear tree structure. You can schedule the various activities by defining timelines for them.

You can only create a timeline in the calendar view.

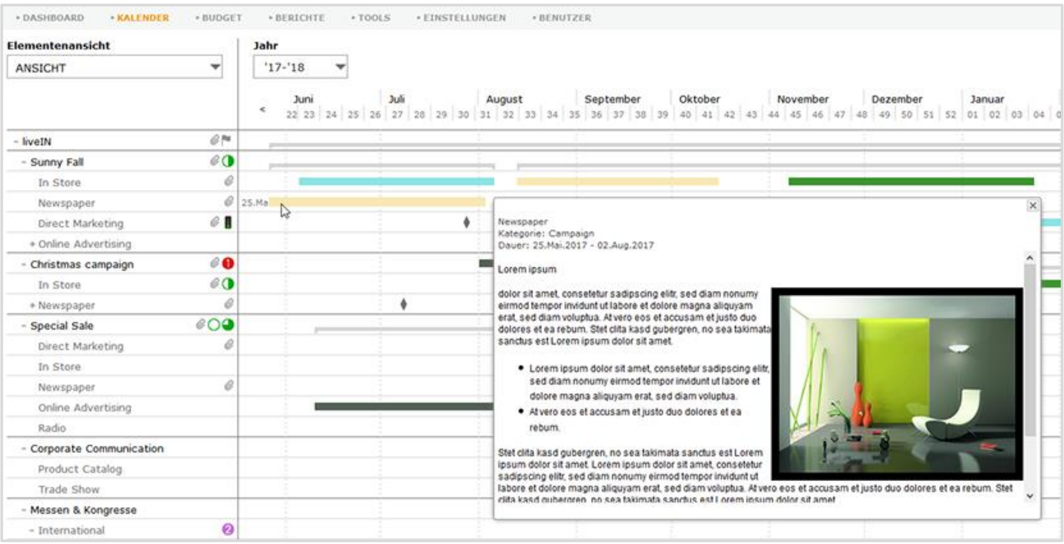
The timelines of a sub-element are displayed in groups of gray bars on the level of the parent element. The gray bars represent the time period between the start date of the earliest and the end date of the last planned timeline.

You can plan an advertising activity for or within a specific timeline. You define a start date and an end date for the timeline. A timeline can be:

- assigned to a category,
- moved as a whole (the duration remains unchanged).

For greater clarity, you can display the timeline names in the bars in the calendar. The administrator must enable this function throughout the system. If you have any questions, please contact your system administrator. If the function is enabled, the names are also displayed in a PDF export of the timelines.

If the *Content enrichment* function is activated in your system, timelines can be enriched with information about the respective marketing activities. If such content is inserted in a timeline and you place the cursor on the timeline in the calendar, the information will be displayed in a tooltip:




For more information, see the chapter Content enrichment on page 112.

The schedule for advertising measures may change or the measures may require more time. You can move and update timelines easily. There are two ways to update a timeline:

- You can move a timeline in the planning area by using drag and drop.
- You can change a timeline in the detailed view.

### Context menu

You can right-click a timeline to access a context menu with the following functions:

| Function | Description |
|---|---|
| *New Timeline* | **Note:** You access this function by right-clicking a free area in the calendar.<br>This creates a timeline on the current position. |
| *Details* | This opens the *Edit timeline* dialog box for the timeline. |
| *Bulk selection* | • *Select precedent timelines/tasks*: This selects all of the tasks/timelines for the planning element that are dated earlier than the selected task/timeline.<br>• *Select subsequent timelines/tasks*: This selects all of the tasks/timelines for the planning element that are dated later than the selected task/selected or current timeline. |
| *Move* | You can change the start and end date of a timeline or move the entire timeline on the time axis using Drag and Drop. When you move the timeline, the duration of the timeline remains unchanged. |
| *Cut* | This copies the timeline to the clipboard and deletes it from the tree structure. |
| *Copy* | This copies the timeline to the clipboard. |
| *Paste* | **Note:** You access this function by right-clicking a free area in the calendar.<br>This adds a cut or copied timeline. |
| *Change category* | This changes the category of the timeline. |
| *Selection assistant* | • *Open*: This opens the selection assistant.<br>• *Add*: This adds a timeline to the selection assistant that you selected by right-clicking it. |
| *Group* | • *Create group*: This groups together the selected tasks and timelines.<br>• *Merge selection*: The selected tasks and timelines are added to the selected groups or multiple groups are merged into one group.<br>• *Exclude from group*: The selected tasks and timelines are excluded from the group.<br>• *Ungroup*: The selected groups are dissolved.<br>• *Open group manager*: This opens the group manager. |
| *Delete* | You use this command to delete the selected timeline. |

### 4.2.1 Creating a timeline

You want to schedule an activity (advert placements, for example) and create a timeline for it. There are two ways to create a timeline:

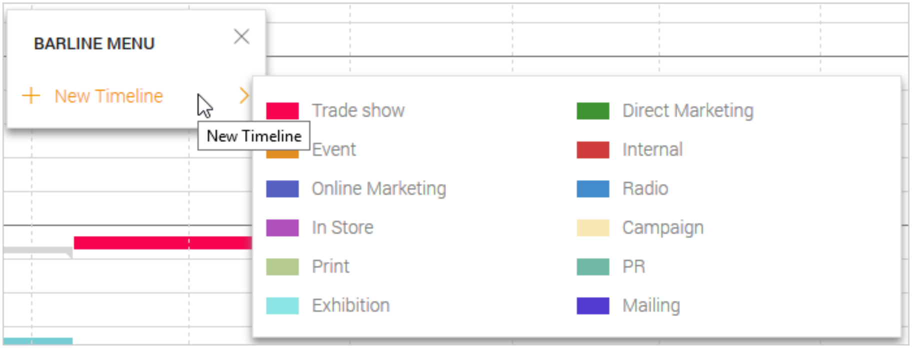
- In the calendar
- In the detailed view

**Creating a timeline in the calendar**

1. Click > *Calendar*.
2. Open the context menu for the line of the element for which you want to create a timeline.
3. Choose *New Timeline*.

This extends the context menu.

4. Select the *Category* of the timeline.




5. Move the cursor to the required start date for the timeline.

A tooltip displays the start date over which you are currently positioned.

6. Left-click to define the start date for the timeline and hold the mouse button down.
7. Continue to hold down the mouse button and drag the timeline to the required end date. The end date for the timeline is set when you release the mouse button.

You have created a new timeline. If you would like to add information, double-click the timeline. The *Edit timeline* dialog box will then open.

**Note**

If you click and immediately release the mouse in step 6, a time period with a duration of one day is created. You can then increase the duration by editing the time period in the detailed view.

**Creating a timeline in the details view**

1. Open the *Detailed view* of the element and switch to the *Timelines* tab.
2. Choose *Add*.

The *Timeline* dialog box opens.

3. Optional: Enter the *name* of the timeline in the topmost input field.
4. Enter the start and end date of the timeline.
5. Choose a category.
6. If available in your system: Add information to the timeline. See the chapter Content enrichment on page 112.
7. Click *Save* to confirm your entry.

You have created a timeline in the detailed view.

### 4.2.2 Deleting a timeline

You want to delete a timeline.

**Caution:** When you delete a timeline, all of the connected data is lost and cannot be restored.

1. Open the context menu for the timeline that you want to delete.
2. Choose *Delete*.
3. In the dialog box that opens, choose *Yes* to confirm the deletion.

The timeline is deleted and cannot be restored.

### 4.2.3 Copying and pasting a timeline

You want to copy a timeline from one planning element and paste it into another planning element.

1. Right-click on the timeline which you would like to copy.

This will display the context menu for timelines.

2. Choose *Copy*.

The timeline has now been copied.

3. In the calendar, right click on the row of the planning element where you would like to paste the timeline.

> **Please note:** The corresponding period of the planning element may not be occupied by other timelines.

4. Click *Paste* in the context menu which opens.

The timeline is pasted into the row of the planning element. The timeline has the same start and end date and is allocated to the same category. Content added with Content Enrichment is also copied.

### 4.2.4 Moving a timeline using drag and drop

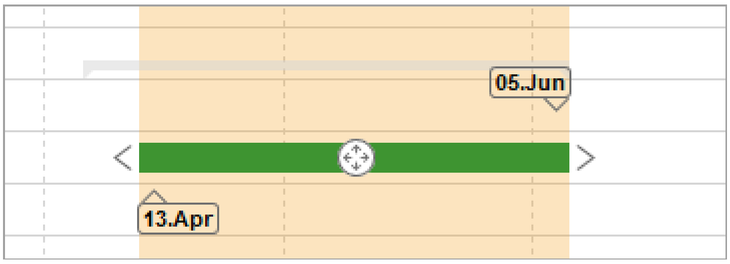
You want to move a timeline simply by using drag and drop.

1. Open the context menu for the timeline that you want to move.

The selected timeline is flagged with a circle icon.

2. Choose *Move*.

Arrow symbols are displayed to the left and right of the selected timeline. The symbol is displayed in the center of the timeline:




3. You have several options when moving the selected timeline:

- Drag one of the arrow symbols to the left or right to move the start or end date of the timeline.
- Move the symbol to move the entire timeline in the planning area. The length of the timeline remains unchanged.

The selected timeline has been moved.

### 4.2.5 Moving multiple tasks/timelines

You have scheduled several promotions for the introduction of the new product line `Produktneuheit`. In your marketing plan, you have created a timeline and corresponding tasks for each promotion for the planning element `Produktneuheit`. You have created a timeline for roadshows in `Hamburg`, `Berlin`, and `München` respectively. An e-newsletter is scheduled to be sent for each roadshow date. The product launch and, as a result, the entire plan is then delayed. You want to move all the affected timelines and tasks back by four weeks quickly and easily using drag and drop.

1. Select a timeline or task from the planning element `Produktneuheit`.
2. Open the context menu.
3. Choose one of the following functions:

- *Bulk selection > Select precedent timelines/tasks*
- *Bulk selection > Select subsequent timelines/tasks*

4. In the dialog box that opens, specify whether you want to copy (and therefore select) the timelines and/or tasks by activating the relevant checkboxes.
5. Open the context menu and click *Move*.

All the precedent and/or subsequent tasks and/or timelines are selected and can be moved using drag and drop.

### 4.2.6 Moving timelines or tasks to other years

You want to move a selected timeline and/or tasks to a previous or subsequent year.

**Prerequisites**

A previous or subsequent year has been created for the current year in the Marketing Planner.

**Step by step**

1. Open the context menu for the timeline or task.

The timeline or task is flagged with a circle icon.

2. Choose *Move*.

The  icon is displayed on the timeline or task. *Arrow* symbols are also displayed to the left and right of the timeline.

3. Move the timeline or task:

- Move the  icon to the left-hand margin of the planning area to move the timeline or task to the predecessor year.
- Move the  icon to the right-hand margin of the planning area to move the timeline or task to the subsequent year.

A new dialog box opens.

4. Specify the new data.

5. Choose *Save changes*.

The timeline or task is moved.

### 4.2.7 Moving timelines from the detailed view

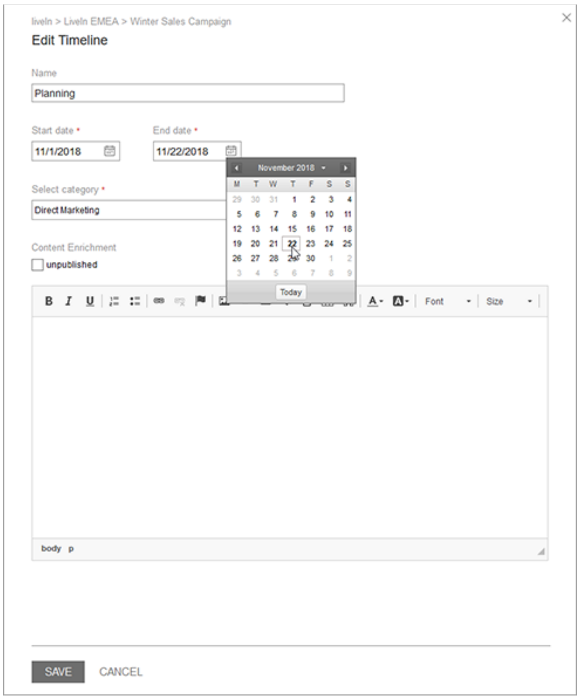
You want to move a timeline from the detailed view of the corresponding planning element.

1. Open the *detailed view* of the element for which you want to change a timeline.
2. Go to the *Timelines* tab.
3. Select the created timeline by activating the checkbox in the first column.
4. Choose *Edit*.

This activates edit mode.

5. Click the *calendar icon* to select a new start and end date from the integrated calendar.
6. Choose *Save* to confirm your entry.
7. Choose *X.*

The detailed view closes and your entries are saved. The selected timeline has been moved according to the new dates.



### 4.2.8 Sending elements by e-mail

You want to send the dates (start and end date) of a planned marketing measure by e-mail as an iCalendar file (ICS format) so that other users can easily transfer the dates of the period to their calendar.

1. Open the context menu for the element whose timelines you want to send by e-mail.
2. Choose *Send timelines by e-mail*.

   This opens a new dialog box.
3. You can use the *Search for recipients* search field to select other users or distribution lists as the e-mail recipient.

   The *Selected recipients* are listed in a table. The *Access* column displays whether the users can access the Marketing Planner.
4. Enter your *message* in the input field.
5. Choose *Send*.
6. Confirm the e-mail by clicking *OK* in the dialog box that opens.

The e-mail has been sent to the selected recipients. The e-mail includes information about the name of the timelines, the start and end dates, and the path to both the corresponding planning element and the start and end dates of the timelines within the tree structure attached as an ICS file.

**Sending one timeline or selected timelines of an element by e-mail**

1. Open the detailed view for the element whose timelines you want to send by e-mail.
2. Go to the *Timelines* tab.
3. In the first column in the table, activate the checkboxes for the timelines that you want to send.
4. Choose *Send by email* above the table.

   The *Send timelines by e-mail* dialog box opens.
5. You can use the *Search for recipients* search field to select the e-mail recipient.

   The *Selected recipients* are listed in a table. The *Access* column displays whether the users can access the Marketing Planner.
6. Enter your *message* in the input field.
7. Choose *Send*.

The e-mail has been sent to the selected recipients. The e-mail contains the timelines that you selected in the detailed view of the element. The same data as the data sent when you send all the timelines of an element is sent for these timelines.

### 4.2.9 Adding content

If you have elements with multiple timelines to which you want to add specific content, use the *Add CMS content* function.

**Step by step:**

1. Double-click the timeline to which you want to add content.

   The detailed view of the corresponding element and the *Edit timeline* dialog box will open.

2. Insert the desired contents into the editor in the lower area of the dialog box. In the following chapters you will learn which processing options you have.
3. If other users are to see the content, enable the *Published* checkbox.
4. Click *Save*.

You have added content to the timeline. When you move the cursor over the timeline in the calendar view, a preview of the added content is displayed if it is published.

## 4.3 Tasks and jobs

A distinction is made between tasks and jobs in the Marketing Planner.

- *Task*: Tasks are created and used only within the Marketing Planner. These tasks do not have a defined workflow.
- *Job* from Job Manager: Jobs have a workflow and are processed using this workflow. You can create jobs for an element in the Marketing Planner.

**Note**

It is also possible to link existing jobs to existing planning elements in the Job Manager. You can also create planning elements in the Marketing Planner and link a job to the created element. For more information, please refer to the Job Manager user manual.

**Note**

The Job Manager module must be activated for you to create a job from the Marketing Planner. You must also have the rights required to create a new job.

When you create and edit a job in the Marketing Planner, you must note the following:

- You can edit the job data sheet from the Marketing Planner only in the dialog box that opens.
- The status of the job must be edited in the Job Manager. The status is only displayed in the Marketing Planner.
- You can only create the completion date in the Marketing Planner. It can only be further edited in the Job Manager.

The system administrator can configure whether the person responsible for a task is informed of the upcoming due date by e-mail. The administrator defines the number of days before the due date and the time of day to send the e-mail. If you have any questions, please contact your system administrator.

You can right-click a simple task to access a context menu with the following functions. Note that you may not see all entries if you do not have the appropriate permissions.

| Function | Description |
|---|---|
| *Details* | This opens the *Edit task* dialog box for the task. |
| *Bulk selection* | • *Select precedent timelines/tasks*: This selects all of the tasks/timelines for the planning element that are dated earlier than the selected task/timeline.<br>• *Select subsequent timelines/tasks*: This selects all of the tasks/timelines for the planning element that are dated later than the selected task/selected or current timeline. |

| Function | Description |
|---|---|
| *Move* | You can change the date of a task or move the task on the timeline using drag and drop. |
| *Change marker* | This changes the task marker. |
| *Change status* | This changes the status of the task. |
| *Selection assistant* | • *Open*: This opens the selection assistant.<br>• *Add*: This adds a task to the selection assistant that you selected by right-clicking it. |
| *Group* | • *Create group*: This groups together the selected tasks and timelines.<br>• *Merge selection*: The selected tasks and timelines are added to the selected groups or multiple groups are merged into one group.<br>• *Exclude from group*: The selected tasks and timelines are excluded from the group.<br>• *Ungroup*: The selected groups are dissolved.<br>• *Open group manager*: This opens the group manager. |
| *Select a task* | **Note:** This is visible only if there are multiple overlapping tasks.<br>This opens a dialog box in which you can select one of the overlapping tasks. |
| *Delete* | This deletes the selected task. |

**Note:** Note that jobs do not have a context menu.

### 4.3.1 Creating a simple task

You want to create a simple task and assign it to a different user.

1. Open the *detailed view* for the element for which you want to create a task.
2. Go to the *Tasks* tab.
3. Choose *Add*.

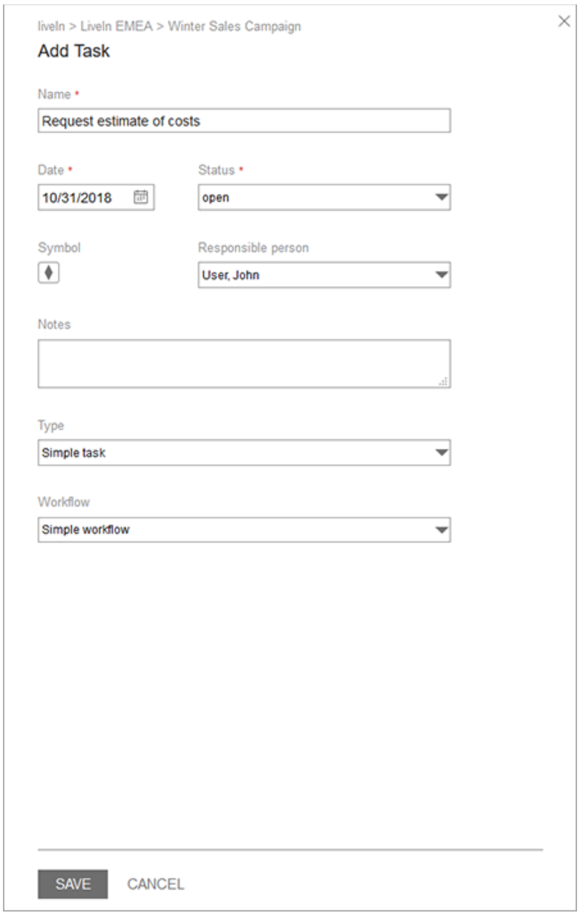
A dialog box opens.

4. Enter the required information for the simple task:

- *Task*: Enter the name of the task in this input field.
- *Date*: Define the date on which the task is to be completed.
- *Status*: Select the status of the task from the dropdown list (*open, in progress, done, planned, paused, or canceled*).
- *Symbol*: Select the symbol used to display the task in the planning area of the calendar view.
- *Responsible Person*: From the picklist, select the user responsible for the task. The selected user is informed about the task by e-mail.
- *Notes*: Enter additional information about the task in the input field.
- *Type*: Select *Simple task* from the dropdown list.
- *Workflow*: Select *Simple workflow* from the dropdown list.

5. Choose *Save* to confirm your entries.
6. Choose *X*.

The detailed view closes and your details are saved. The task has been created and is displayed using the selected symbol in the planning area of the calendar view. The responsible user is informed about the task by e-mail. The task is displayed in the *My Tasks* dashlet of the responsible user. When you move the mouse over the symbol of a task in the planning area, a tooltip is displayed with information about the task (date, name of the task, status, responsible person).




## 4.3.2 Creating a job

You want to create a job from the Job Manager module in the Marketing Planner and assign it to a different user.

### Prerequisites

- You can access the Job Manager module and have the rights required to create a job.

### Step by step:

1. Open the *detailed view* for the element for which you want to create a job.
2. Go to the *Tasks* tab.
3. Choose *Add*.

This activates the input screen.

4. Enter the required information:

- *Task*: Enter the name of the task in this input field.
- *Date*: Define the date on which the task is to be completed.
- *Status*: Select the status of the task from the dropdown list (open, in progress, done, planned, paused, or canceled).

- *Symbol*: Select the symbol used to display the task in the planning area of the calendar view.
- *Responsible Person*: From the picklist, select the user responsible for the task. The selected user is informed about the task by e-mail.
- *Notes*: Enter additional information about the task.
- *Type*: Select a *job type* from the dropdown list.
- *Workflow:* Select a suitable workflow for the job from the dropdown list.

5. Choose *Save* to confirm your entries.

The job is created, and the job data sheet opens.

6. Enter the additional required information on the job data sheet:

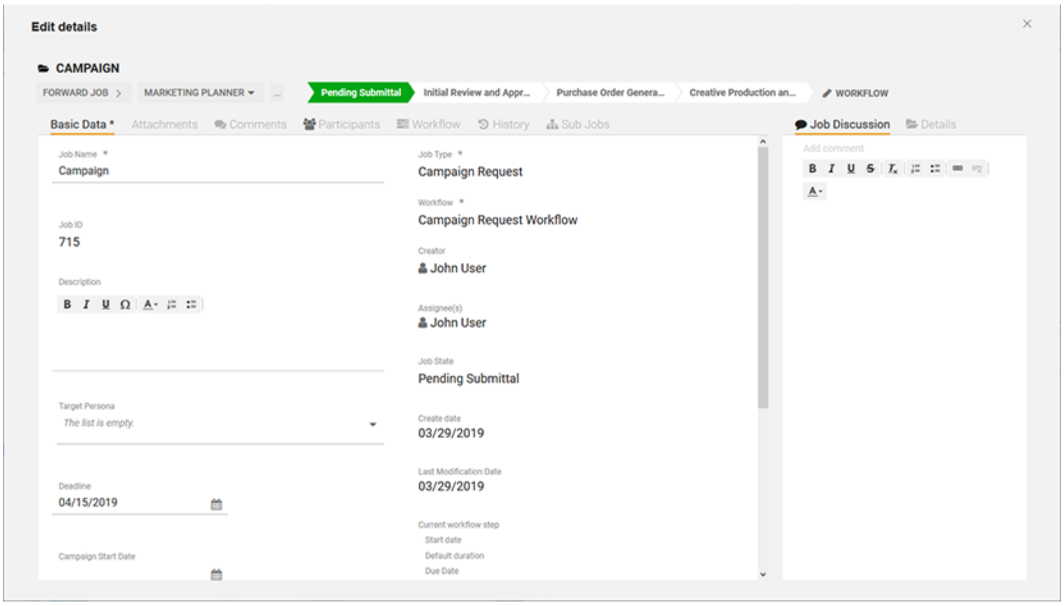
- *Job Name*: The name is transferred.
- *Description*: The entered notes are transferred.
- *Desired Delivery Date*: The date is transferred.
- *Job Type*: The job type that you selected is transferred.
- *Workflow*: The workflow that you selected is transferred.
- *Creator*: The user who created the job is transferred.
- *Assignee(s)*: The user who created the job is transferred.
- *Create date*: The creation date of the task is adopted.

7. Choose *Next data sheet* on the current tab to enter additional information about the job.
8. Click *Save* to save your entries.
9. Click *X* to close the data sheet and return to the detailed view in the Marketing Planner.

> **Note:** Once you have created the job, you only have read access for the Name, Notes, Status, and Date fields. A job can only be rescheduled or moved in the Job Manager module.

10. Choose *X*.

The detailed view closes. The task has been created and is displayed using the selected symbol in the planning area of the calendar view. The responsible user is informed about the task by e-mail. The task is displayed on the dashboard in the *My Tasks* dashlet of the responsible user. When you move the mouse over the symbol of a task in the planning area, a tooltip is displayed with information about the task (date, name of the task, status, responsible person).



## 4.3.3 Overlapping task icons

In the calendar view of the Marketing Planner, existing tasks in the planning area are displayed as icons. This provides you with a quick overview of all the tasks and quick and easy access to your tasks. However, icons for tasks with an identical date overlap each other. To ensure that you can select specific tasks if the tasks are overlapping, the Marketing Planner helps you to select and move them.

### *4.3.3.1 Selecting an "overlapping" task*

You want to move the date of a task. An additional task with the identical date exists. The two icons therefore overlap each other in the planning area of the calendar view.

**Step by step:**

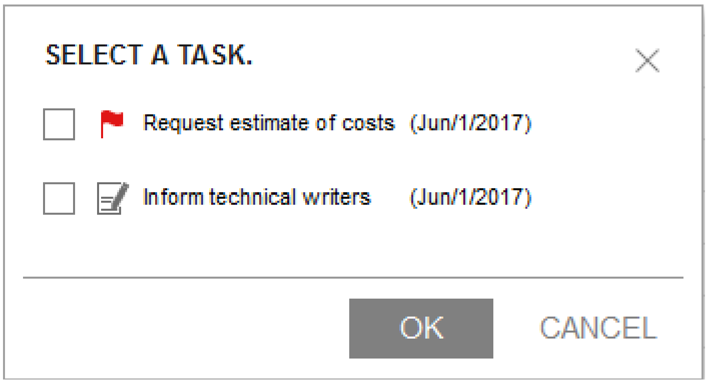
1. Open the context menu by clicking a *task* icon.
2. Choose the function *Select a task*.

This opens a new dialog box.

3. Activate the checkbox for the task that you want to move.
4. Choose *OK* to confirm your selection.

You have selected the task.

5. Open the context menu and choose *Move*.



## 4.4 Groups

To move tasks and timelines that are related to each other easily when there are changes to the plan, merge them together in a group. If you select or move a grouped task or a grouped timeline, this also selects or moves all of the objects that belong to the group.

**Note**: Note that you can add only simple tasks, but not jobs, to a group.

The Marketing Planner provides functions for the following activities:

- Grouping tasks and timelines (page 108)
- Adding a task, timeline, or group to a group (page 108)
- Excluding a task or timeline from a group (page 109)
- Ungrouping (page 109)

**Note**

You can only create, edit, move or cancel a group if you have access to all planning elements whose tasks and time periods are assigned to the group.

You can also access these functions from the group manager (see Group manager on page 110). Here, you can move tasks or timelines in a group easily, for instance. You can use the Selection Assistant to gather together tasks, timelines, and groups that you want to manage in the list view (see Selection Assistant on page 110). The Selection Assistant is especially helpful if you want to manage objects in the list view that are not displayed together on the screen.

### 4.4.1 Grouping tasks and timelines

You want to group several tasks and timelines so that measures that belong together can be moved collectively.

1. Hold down the CTRL key and click the tasks and timelines that you want to group.

   The selected objects are flagged with a *circle* symbol.

2. Right-click one of the selected objects.

   The context menu opens.

3. Choose *Group > Create group*.

The selected timelines and tasks are now grouped together. A border with dashed lines around the individual objects in the group indicates the grouping.

### 4.4.2 Adding a task, timeline, or group to a group

If you want to add a task, timeline, or group to a group, use the *Merge selection* function:

1. Click an object from the group to which you want to add an object.
2. Hold down the CTRL key and click the object (task, timeline, or group) to be added to the group. If you want to add multiple objects, repeat the process.

   The selected objects are flagged with a *circle* symbol.
3. Right-click one of the selected objects.

   The context menu opens.
4. Choose *Group > Merge selection*.

The selected objects are now a part of the group.

### 4.4.3 Excluding a task or timeline from a group

If you want to exclude a task or timeline from a group without ungrouping all of the objects, use the *Exclude from group* function:

1. Click the group from which you want to exclude one or more objects.

   All of the objects in the group are bordered with the dashed line and flagged with a *circle* symbol.
2. Hold down the CTRL key and click all of the objects (tasks or timelines) that are to remain in the group.

   These objects are displayed without the *circle* symbol. The objects that are to be excluded are displayed with the *circle* symbol.
3. Right-click one of the objects (with the *circle* symbol) to be excluded.

   The context menu opens.
4. Choose *Group > Exclude from group*.

The selected objects are no longer a part of the group.

**Note:** You can also access this function from the group manager (see Group manager on page 110).

### 4.4.4 Ungrouping

1. Click a group.

All of the objects are selected.

2. Right-click one of the objects.

The context menu opens.

3. Choose *Group > Ungroup*.

The objects are ungrouped.

### 4.4.5 Group manager

The group manager displays the following objects:

- If you access the group manager in the calendar view by choosing *Group > Open group manager*: The objects selected in the calendar view (tasks, timelines, or groups)

  OR

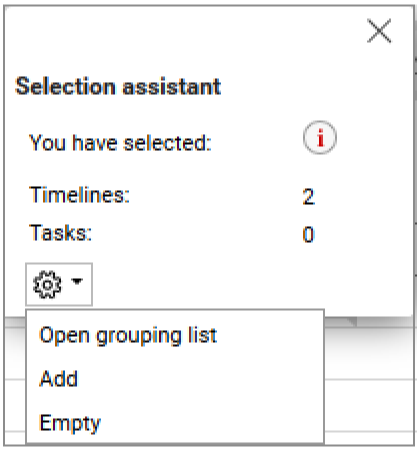
- If you access the group manager in the Selection Assistant by clicking the *gear* icon and then choosing *> Open group manager*: The objects grouped together in the Selection Assistant

#### *4.4.5.1 Selection assistant*

If you have selected at least one task or timeline in the calendar view, you can call the Selection Assistant from the context menu:

- *Selection Assistant > Open*: The Selection Assistant opens in a separate window. The selected object is already collected.

You can move and place the window freely. It displays the number of collected tasks and timelines. If you have added a grouped task or timeline to the Selection Assistant, all of the objects in the group are selected automatically. This is indicated by the red info symbol in the Selection Assistant:



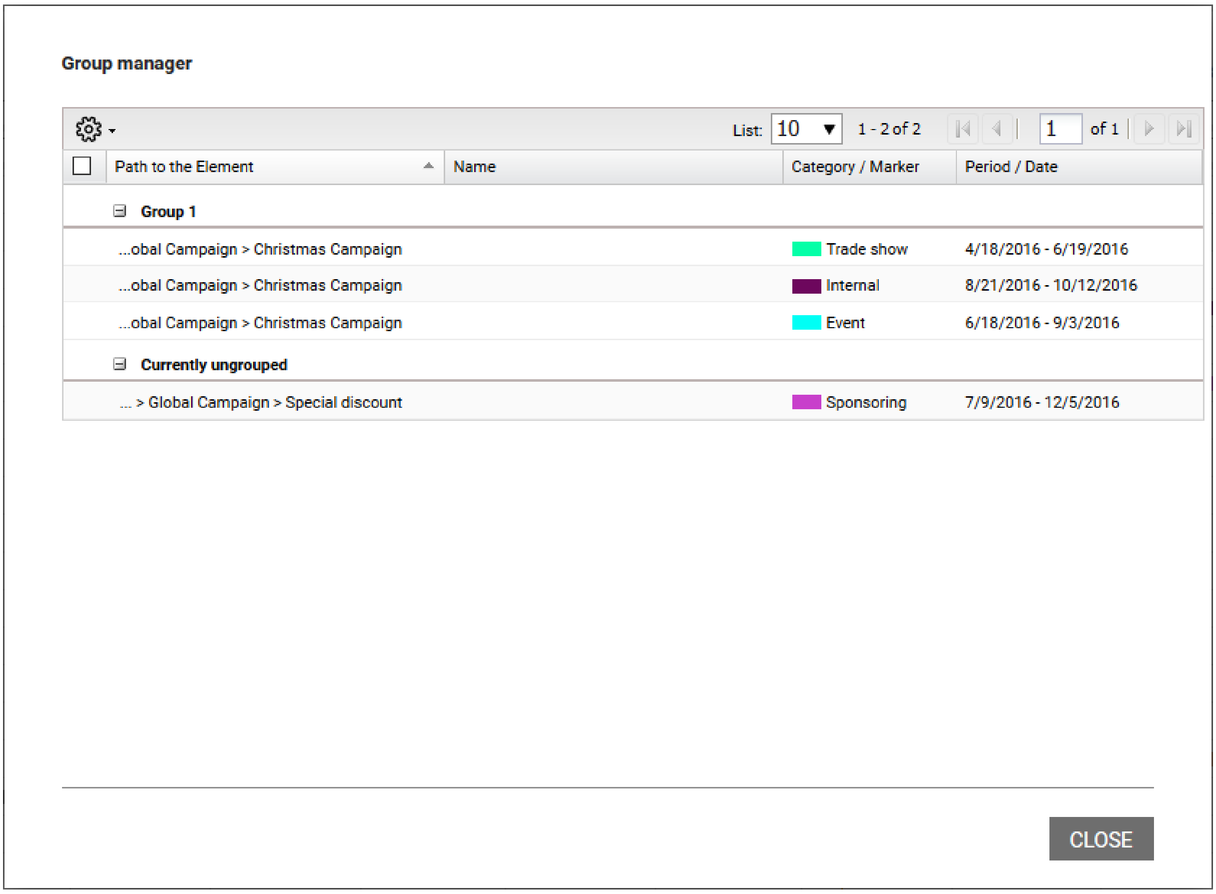
To add additional items to the group, go to the calendar view, select your required objects, and choose one of the following options:

- In the calendar view context menu: *Selection Assistant > Add*.
- In the Selection Assistant: Click the *gear* icon and then choose > *Add*.

Once you have added all of your required objects to the group, click the *gear* icon and choose *Open group manager* to go to the group manager.

> **Note:** Note that the group in the Selection Assistant is kept when you close the window by clicking the X symbol. If you want to remove the tasks and timelines from the Assistant, click the *gear* icon and choose > *Empty*.

### *4.4.5.2 Layout*




In the upper pane, you can use the *List* field to configure the number of objects displayed per page. You can switch between pages using the arrow symbols.

The lower pane displays all of the selected or collected objects. If the tasks and timelines are already assigned to a group, the groups are listed first, and then the objects that are not grouped. In the very first column, you can select a task, timeline, or group. To do this, place the cursor above the relevant line and activate the checkbox that appears. The list also contains the following columns:

- Path to the element: The path in the tree structure to the element to which the task or timeline is assigned.
- Name: The name of the task or timeline.
- Category/Marker: This displays the visual indicator that is used for the object in the calendar.
- Period/date for the object.

### Functions

Once you have selected one or more objects, you can access the following functions by clicking the *gear* icon:

- Create group: The selected tasks and timelines are grouped together.
- Merge selection: The selected tasks and timelines are added to the selected groups or multiple groups are merged into one group.
- Exclude from group: The selected tasks and timelines are excluded from the group.
- Ungroup: The selected groups are dissolved.

> **Note:** You can only use these functions within one page. If required, configure the *List* field so that you can access all of the required objects on one page.

### Adapt

To adapt the table to your requirements, you have the following options. The settings are saved for each user and can be adjusted again at any time.

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

## 4.5 Content Enrichment

> **Note**
>
> Please note that Content Enrichment is an optional function and therefore not available in every system. If you would like to activate the function in your system, please contact your contact partner at BrandMaker.

Planning elements and timelines can be enriched with information about the respective marketing activities.

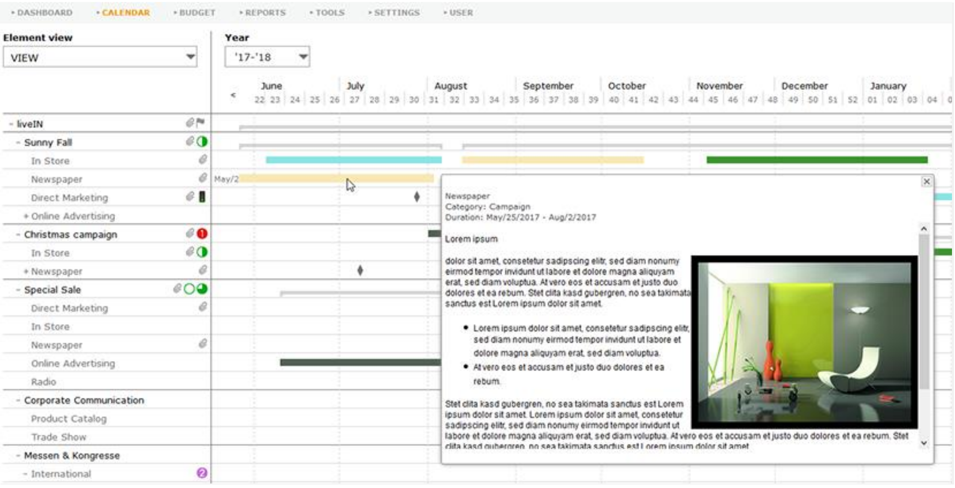
**Content enrichment at planning elements**

You can access additional information about a planning element by opening the element context menu and choosing *Additional Information.* If you select the function, the following dialog box will be shown to the right containing the additional information:


If additional information is added, the icon  is displayed on the planning element.

### Content enrichment for at timelines

If such content is inserted in a timeline and you place the cursor on the timeline in the calendar, the information will be displayed in a tooltip:




### General notes on operation

For a planning element, access the editor for the Content Enrichment, by going to the detailed view of the element and then to *Quick Actions > Edit general element info*. To display the editor for a timeline, open the Timeline Context Menu and click *Details*. The *Edit timeline* dialog box opens.

If you have entered content in the Editor, this content is not automatically visible to other users. To make entered content visible, activate the *Published* checkbox above the Editor.

For the Content Enrichment Tooltips on the timeline, you can specify a default size in pixels. The minimum size is 450 x 200 px, the maximum value is 1024 x 768 px. Also, the Tooltip size can now be adjusted with the cursor.

### Possible contents

You can insert the following content:

- Text and special characters (see chapter 4.5.1)
- Table (see chapter 4.5.2)
- Hyperlinks (see chapter 4.5.3)
- Images (see chapter 4.5.4)

> **Note**
>
> Only pixel graphics can be displayed directly in the information. Vector graphics can only be included via hyperlink.

- Slideshow (see chapter 4.5.5)
- PDF (see chapter 4.5.6)
- Report from the Reporting Center (see chapter 0)
- HTML5 videos (see chapter 4.5.8)

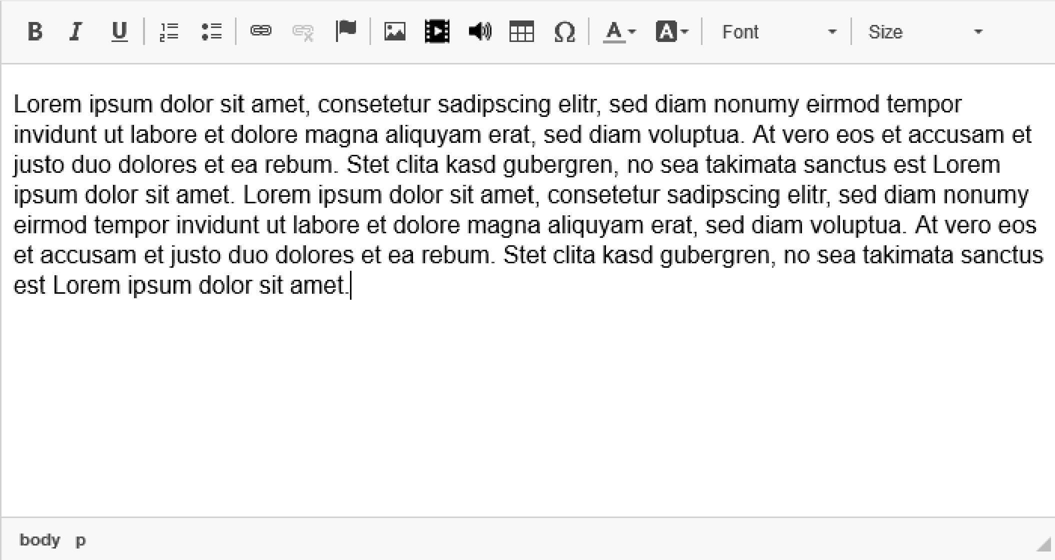
> **Note**
>
> The *Content Enrichment* function uses your browser's video player to play videos. Different browsers support different video formats. Therefore, please note the formats supported by your browser when integrating videos. If your BrandMaker system is accessed with various browsers, use the MP4 video format.

- HTML5 audio files (see chapter 4.5.9)

> **Note**
>
> The *Content Enrichment* function uses your browser's player to play audio files. Different browsers support different formats. Therefore, please note the formats supported by your browser when integrating audio files. If your BrandMaker system is accessed with various browsers, use the MP3 audio format.

### 4.5.1 Text and special characters

The editor for inserting information provides the following functions for text and special characters:




Enter the given text in the editor. Text is always left-justified. You can edit or update the text with the following functions:

| Function | Description |
|---|---|
| **B** | You mark text in bold. |
| *I* | You mark text in italics. |
| U | You underline text. |
|  | You insert a numbered list.<br>Right-click on the list to open the context menu. You can use *Numbered List Properties* to access the following properties:<br>• *Start*: Enter the starting figure.<br>• *Type*: Select the numbering type, such as Roman numerals, lowercase or uppercase letters. |
|  | You insert a non-numbered list.<br>Right-click on the list to open the context menu. You can use *Bulleted List Properties* to access the following properties:<br>• *Type*: Select the list symbol: ring, circle, or square. |
| Ω | Open the *Select special characters* dialog box. Click your desired special character. The special character is inserted at the cursor position. |
| A | Font color |

| Function | Description |
| --- | --- |
| | Background color |
| Font | Font |
| Size | Font size |

### 4.5.2 Table

To insert a table, position the cursor at the desired position and click . The *Table Properties* dialog box opens. Define the table properties and click *OK*. The table is inserted. You can then edit the cells and insert content.

You can access the following properties in the *Table Properties* dialog box:

***Table Properties* tab**

| Function | Description |
| --- | --- |
| Row | Enter the number of rows in the table. |
| Column | Enter the number of columns in the table. |
| Width | Enter the width of the table in pixels. For information in other units, refer to the tooltip of the field. |
| Height | Enter the height of the table in pixels. For information in other units, refer to the tooltip of the field. |
| Header | Choose whether to use the first row, the first column, or both as header elements. Text in header cells is marked in bold and centered by default. |
| Frame size | Enter the frame size in pixels. |
| Alignment | Select the alignment of the table in the display. |
| Outer cell spacing | Enter the distance of the cell from the frame in pixels. |
| Inner cell spacing | Enter the distance of the text to the cell boundary in pixels. |
| Heading | Enter a heading for the table. |
| Content overview | Enter a content overview for the table. |

If you want to change the display of the text in cells, select the cells. Right-click on the table: the context menu is opened. Click > *Cell* > *Cell properties*. Note the *Cell properties* section below.

### *Advanced* tab

| Function | Description |
|---|---|
| Identifier | Enter an ID. |
| Writing direction | Select whether text is entered right- or left-aligned. |
| Style | Enter a style. |
| Style sheet class | Enter a style sheet class. |

### Other editing functions for tables

You can access further editing functions via the Table context menu:

- *Cell*: You can access functions such as inserting, deleting, or merging cells. You can also access functions for displaying the cells and the inserted text. Note the *Cell properties* section below.
- *Row*: You can insert or delete rows.
- *Column*: You can insert or delete columns.
- *Delete table*: You can delete the table.
- *Table properties*: You can open the *Table properties* dialog box.

### Cell properties

Right-click on one or more selected cells. Click > *Cell* > *Cell properties*. The *Cell properties* dialog box will open with the following editing options:

| Function | Description |
|---|---|
| Width | Enter your desired width. If necessary, select a unit. |
| Height | Enter your desired height. The unit is the same as that of the cell width. |
| Cell type | Choose:<br>• *Data*: The cells are data cells.<br>• *Heading*: The cells are header cells. |
| Line wrap | Specify whether to wrap text in the cell. |
| Horizontal alignment | Select the horizontal alignment of the text in the cell. |
| Vertical align | Select the vertical alignment of the text in the cell. |
| Merge number of rows | Enter how many rows are to be merged starting from the selected cell. |
| Merge number of columns | Enter how many columns are to be merged starting from the selected cell. |

| Function | Description |
|---|---|
| Background color | Choose a color for the cell background. |
| Border color | Choose a color for the cell border. |

### 4.5.3 Hyperlinks

You can include hyperlinks in the tooltip to solve the following tasks:

- *Link to URL*: For example, you can link to Internet pages by linking to a URL. You also have the option of including files in the tooltip whose formats are not displayed directly in the tooltip, such as vector graphics or documents. For more information, see the chapter Inserting a hyperlink to a URL (see page 119).
- *Hyperlink to anchor in tooltip*: This function guides the user within a tooltip, e.g. if the tooltip is very large. For more information, see Inserting anchors and hyperlinks to anchors (see page 120).
- *Sending an e-mail*: When the user clicks on this kind of link, a mask for sending an e-mail opens. This enables functions such as orders for advertising materials to be implemented. For more information, see Establishing a hyperlink to e-mailing on page 121.

**Explanation of the properties of links**

Enter the link properties in the *Link* dialog on the *Link info*, *Target page*, and *Advanced* tabs. The properties on the *Link info* tab are explained in the following sections, which explain how to create the different link types. For the properties on the *Target page* and *Advanced* tabs, see the documentation for CKEditor 4.

#### *4.5.3.1 Insert hyperlink to URL*

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

**Insert hyperlink to URL**

1. In the editor, position the cursor where you want to insert the hyperlink. If you select a text, this text will be used as the default for the display text.
2. Choose .

The *Link* dialog box is displayed.

3. Optional: Enter a display text.
4. Select the link type *URL*.
5. Specify the log and URL.
6. Optional: If required, edit the other properties of the hyperlink on the *Target page* and *Advanced* tabs.
7. Choose *OK*.

The hyperlink has been added in the editor.

#### *4.5.3.2 Insert anchor and hyperlink to anchor*

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

**Insert anchor and hyperlink to anchor**

1. In the editor, position the cursor where you want to insert the anchor. If you select a text, this text will be used as the default for the display text.
2. Choose .

The *Anchor properties* dialog box is displayed.

3. Enter an anchor name.
4. Choose *OK*.

The *Edit timeline* dialog box is displayed with the anchor.

5. In the editor, position the cursor where you want to insert the hyperlink. If you select a text, this text will be used as the default for the display text.
6. Choose .

The *Link* dialog box is displayed.

7. Select the link type *Anchor in this page*.
8. Select the anchor.
9. Optional: If required, edit the other properties of the hyperlink on the *Advanced* tab.
10. Choose *OK*.

The hyperlink has been added in the editor.
If the user clicks the hyperlink in the additional information, the display navigates to the anchor.

#### *4.5.3.3 Establishing a hyperlink to e-mailing*

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

**Establishing a hyperlink to e-mailing**

1. In the editor, position the cursor where you want to insert the hyperlink. If you select a text, this text will be used as the default for the display text.
2. Choose .

The *Link* dialog box is displayed.

3. Optional: Enter a display text.
4. Select the *E-mail* link type.
5. Enter the e-mail address to which the e-mail will be sent.
6. Optional: Enter a subject for the e-mail.
7. Optional: Enter a message body.
8. Optional: If required, edit the other properties of the hyperlink on the *Advanced* tab.
9. Choose *OK*.

The hyperlink has been added in the editor.
When the user clicks the link in the additional information, the user can send an e-mail.

### 4.5.4 Images

**Note**

Only pixel graphics can be displayed directly in the additional information. Vector graphics can only be included via hyperlink.

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

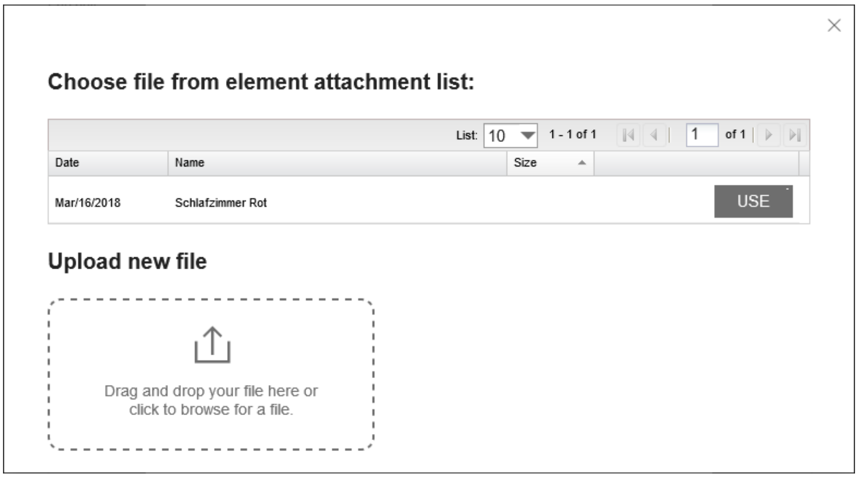
**Insert pixel graphic**

1. In the editor, position the cursor where you want to insert the pixel graphic.
2. Choose .

The *Image properties* dialog box is displayed.

3. Click *Browse server*.

Another dialog box is displayed:




The top list shows the planning element's attachments. Note that the files can be of different formats, including documents, vector graphics, etc.

4. If you do not select a pixel graphic from the existing list of attachments, upload a new file: Add a file by drag and drop in the lower left area.

The image is uploaded and added to the attachment list.

5. In the attachment list, click the *Use* button next to the pixel graphic that you want to include.

The image is included in the preview in the *Image properties* dialog box.

6. Edit the image properties. Refer to the following sections for detailed information when doing so.
7. Choose *OK*.

The image has been added in the editor.

**If the graphic is not displayed correctly**

Note that the graphic will only be displayed correctly if it is a pixel graphic. If you have accidentally selected a file with a different format in the attachment list, a red icon with a white X will appear in the *Image properties* dialog box. If you close the dialog box and the editor is displayed, the icon  is displayed instead of the image. In this case, select another file.

***Image Info* tab**

You can access the following properties in the *Image properties* dialog box:

| Function | Description |
|---|---|
| URL | Enter the URL to the pixel graphic or click Browse Server. If you have selected a pixel graphic, the URL will be inserted automatically. |
| Alternative text | Optionally, you can enter an alternative text. |
| Width | Enter the width in pixels for the display in the additional information.<br>**Note:** Width and height change proportionally to each other by default. If you want to enter a non-proportional ratio, click the lock icon. |
| Height | Enter the height in pixels for the display in the additional information.<br>**Note:** Width and height change proportionally to each other by default. If you want to enter a non-proportional ratio, click the lock icon. |
| Frames | Enter the width of the border in pixels. |
| Horizontal spacing | Enter the horizontal distance of the image from the surrounding elements in pixels. |
| Vertical spacing | Enter the vertical distance of the image from the surrounding elements in pixels. |
| Alignment | Choose whether the image is left-aligned or right-aligned in the additional information. |

***Link* and *Advanced* tabs**

For a description of the adjustable properties, see the documentation for CKEditor 4.

### 4.5.5 Slideshow

In a slideshow, the viewer scrolls through multiple images and/or videos.

> **Note**
>
> The *Content Enrichment* function uses your browser's video player to play videos. Different browsers support different video formats. Therefore, please note the formats supported by your browser when integrating videos. If your BrandMaker system is accessed with various browsers, use the MP4 video format.

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

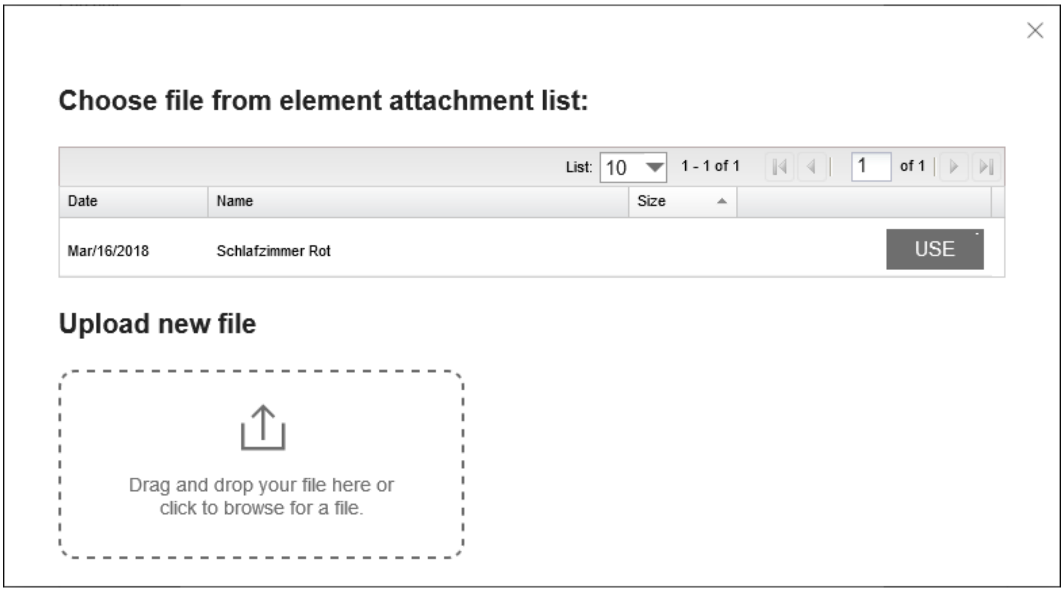
**Adding a slideshow**

1. In the editor, position the cursor at the point where you want to insert the slideshow.
2. Choose .

The *Slideshow* dialog box opens.

3. Choose *Add Image* or *Add Video*.

Another dialog box is displayed.




The top list shows the planning element's attachments. Note that the files can be of different formats, including documents, vector graphics, etc.

4. If you do not select a video or image from the existing list of attachments, upload a new file: Add a file in the lower left area using drag and drop.

The file is uploaded and added to the attachment list.

5. In the attachment list, click the *Use* button next to the image or video you want to include in the slideshow.

The image or video is included in the preview in the *Slideshow* dialog box.

6. Repeat steps 3 to 5 to add additional images and videos.
7. If the images and videos are not yet arranged in the required order, change the order:

a. Click an incorrectly positioned image or video.

b. Click Move to left or Move to right until the image is in the required position.

c. Repeat steps A and B until all the images and videos are in their required positions.

8. Edit the properties of the slideshow. Refer to the following sections for detailed information when doing so.
9. Choose *OK*.

The slideshow has been added in the editor.

**If an image or video is not displayed correctly**

Note that a graphic will only be displayed correctly if it is a pixel graphic. If you have accidentally selected a file with a different format in the attachment list, a red icon with a white X will appear in the *Image properties* dialog box. If you close the dialog box and the editor is displayed, the icon  is displayed instead of the image. In this case, select another file.

Note that a video will only be displayed correctly if it is in a format supported by your browser. If you have accidentally selected a file with a different format, a placeholder will be displayed with a corresponding message. In this case, select another file or convert the video into a different format, e.g. MP4.

***Basic settings* tab**

You can access the following properties in the *Basic settings* dialog box:

| Function | Description |
|---|---|
| Title | Enter a title for the selected element. The title is displayed below the element in the slideshow. |
| Scale | If this checkbox is activated, the element is displayed in full screen mode. Note that this may distort the image or video if its proportions do not match the proportions of the slideshow. |
| Actions | You can use the *Move to left* and *Move to right* buttons to position the image or video in the slideshow.<br><br>You can choose *Remove* to delete the image or video from the slideshow. The image or video is retained as an attachment of the planning element. |

### ***Advanced settings*** **tab**

| Function | Description |
| --- | --- |
| Width | Enter the width in pixels for the display in the additional information. |
| Height | Enter the height in pixels for the display in the additional information. |

### 4.5.6 PDF

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

**Adding a PDF file**

1. In the editor, position the cursor where you want to insert the PDF.
2. Click .

The *PDF* dialog box is displayed.

3. If you want to add a PDF from the element's attachments:
    a. Click *Browse server*.
    b. The attachment list of the element is displayed.
    c. Click the *Use* button next to the PDF you want to add.
4. If you want to upload a PDF:
    a. Click *Browse server*.

    The attachment list of the element is displayed.

    a. Add a PDF file by dragging and dropping in the lower area of the dialog box, or click the area to select a file on your computer. In this case, follow any instructions of your operating system to upload the file.
    b. The file will be uploaded as an attachment to the element and will appear in the attachment list.
    c. Click the *Use* button next to the PDF.
5. If you want to use a PDF from the *Media Pool* module:
    a. Click *Browse Media Pool*.
    b. The browsing of the Media Pool module is displayed.
    c. Browse for the PDF. For detailed information about browsing in the Media Pool, please see the module's user guide.
    d. Activate the checkbox next to the PDF.
    e. Click *Apply*.

The link to the PDF is added to the *URL* field in the *PDF* dialog box.

6. Edit the properties of the PDF. For more detailed information, refer to the section below.
7. Choose *OK*.

The preview image for the PDF has been added in the editor.

### Properties of the PDF

In the *PDF* dialog box, you can access the following properties:

| Function | Description |
|---|---|
| Allow download? | Choose whether users are allowed to download the PDF. If you select *Yes*, a button is displayed below the preview image of the PDF. Users can download the PDF using the button. |
| LinkText | **Note:** This is visible only if the *Allow download?* Property is activated.<br>Define the labeling of the button that will be used to download the PDF. |
| Alignment | Select the alignment of the preview image of the PDF in the display:<br>• *Center*: The preview image is centered. Text cannot flow around the preview image.<br>• *Left*: The preview image is aligned left. If space is available, text flows around the preview image.<br>• *Right*: The preview image is aligned right. If space is available, text flows around the preview image.<br>• *None*: The preview image is not aligned. Text cannot flow around the preview image. |
| Scaling | Define how the content is displayed in the window:<br>• No scaling: The content is displayed unscaled.<br>• Height fill: The content or a page is displayed in full height in the window.<br>• Width fill: The content or a page is displayed in full width in the window.<br>• Window fill: The content is displayed scaled according to either height or width fill. The system selects the option that results in the least scaling. |

### 4.5.7 Reports

#### Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

#### Adding reports

1. In the editor, position the cursor where you want to insert the report.
2. Choose .

The *Report* dialog box is displayed.

3. In the *Choose Report* dialog box, select the report that you want the content enrichment to display.
4. Edit the properties of the report. For more detailed information, refer to the section below.
5. Choose *OK*.

The report has been added in the editor.

#### Properties of the report

| Function | Description |
|---|---|
| Width | Enter the width in pixels for the display in the additional information. |
| Height | Enter the height in pixels for the display in the additional information. |
| Alignment | Select the alignment of the report in the display:<br>• *Center*: The report is centered. Text cannot flow around the report.<br>• *Left*: The report is left-aligned. If space is available, text flows around the report.<br>• *Right*: The report is right-aligned. If space is available, text flows around the report.<br>• *None*: The report is not aligned. Text cannot flow around the report. |

| Function | Description |
|---|---|
| Scaling | Define how the content is displayed in the window:<br>• No scaling: The content is displayed unscaled.<br>• Height fill: The content or a page is displayed in full height in the window.<br>• Width fill: The content or a page is displayed in full width in the window.<br>• Window fill: The content is displayed scaled according to either height or width fill. The system selects the option that results in the least scaling. |

### 4.5.8 HTML5 videos

**Note**

The *Content Enrichment* function uses your browser's video player to play videos. Different browsers support different video formats. Therefore, please note the formats supported by your browser when integrating videos. If your BrandMaker system is accessed with various browsers, use the MP4 video format.

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

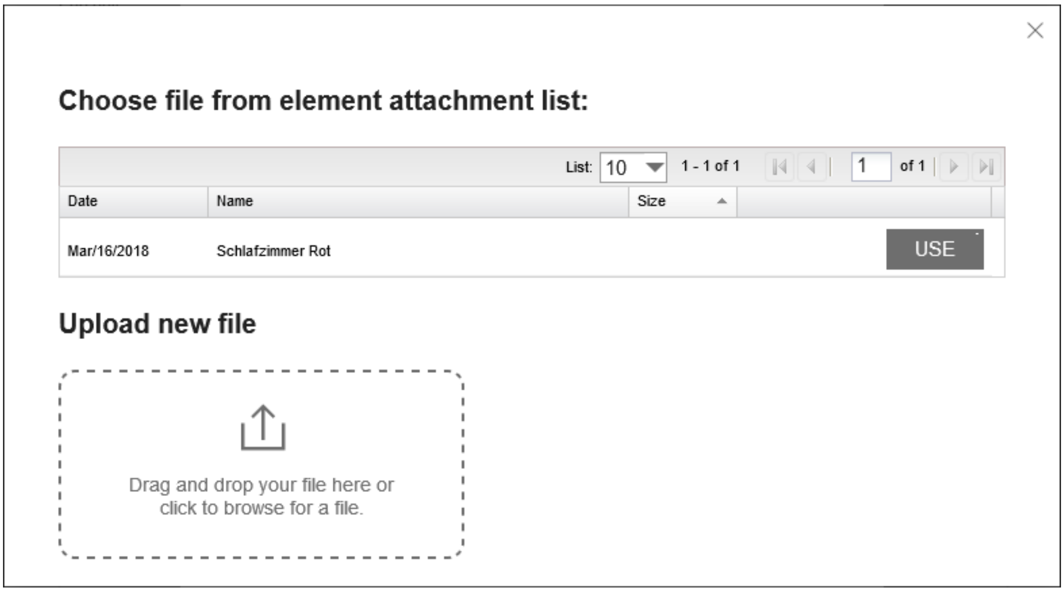
**Insert HTML5 videos**

1. In the editor, position the cursor where you want to insert the video.
2. Choose .

The *HTML5 video* dialog box is displayed.

3. Click *Browse server*.

Another dialog box is displayed:




The top list shows the planning element's attachments. Note that the files can be of different formats, including documents, vector graphics, etc.

4. If you do not select a video from the existing list of attachments, upload a new file: Add a file in the lower left area using drag and drop.

The video is uploaded and added to the attachment list.

5. In the attachment list, click the *Use* button next to the video you want to include.

The video is included in the preview in the *HTML5 video* dialog box.

6. Edit the video properties. Refer to the following sections for detailed information when doing so.
7. Choose *OK*.

The video has been added in the editor.

**If the video is not displayed correctly**

Note that the video will only be displayed correctly if it is in a format supported by your browser. If you have accidentally selected a file with a different format, a placeholder will be displayed with a corresponding message. In this case, select another file or convert the video into a different format, e.g. MP4.

***Video Info* tab**

You can access the following properties in the *HTML5 video* dialog box on the *Video info* tab:

| Function | Description |
| --- | --- |
| Width | Enter the width in pixels for the video player display in the additional information. |

| Function | Description |
| --- | --- |
| Height | Enter the height in pixels for the video player display in the additional information. |
| Alignment | Select the alignment of the video player in the display:<br>• *Center*: The video player will be centered. Text cannot flow around the video player.<br>• *Left*: The video player will be aligned left. If space is available, text will flow around the video player.<br>• *Right*: The video player will be aligned right. If space is available, text will flow around the video player.<br>• *None*: The video player will not be aligned. Text cannot flow around the video player. |

### ***Advanced* tab**

You can access the following properties on the *Advanced* tab:

| Function | Description |
| --- | --- |
| Autoplay? | Select whether the video is played automatically when the user opens the additional information. |

### 4.5.9 HTML5 audio files

**Prerequisites**

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then *Quick Actions > Edit general element info*. To display the editor for a timeline, open the context menu of the timeline and click *Details*. The *Edit Timeline* dialog opens.

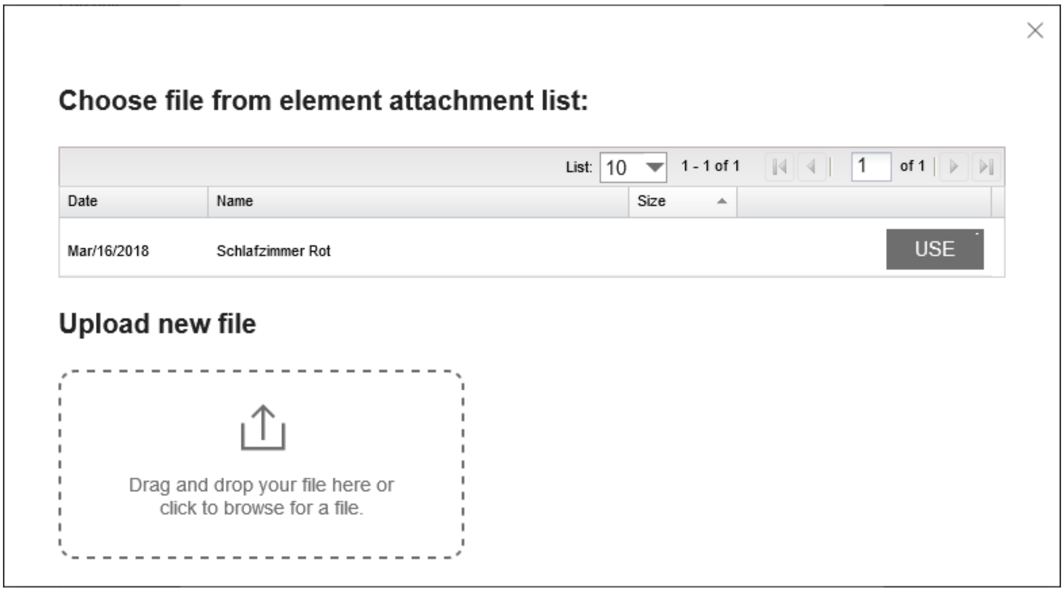
**Insert HTML5 audio files**

1. In the editor, position the cursor where you want to insert the audio file.
2. Choose .

The *HTML5 audio* dialog box is displayed.

3. Click *Browse server*.

Another dialog box is displayed:




The top list shows the planning element's attachments. Note that the files can be of different formats, including documents, vector graphics, etc.

4. If you do not select an audio file from the existing list of attachments, upload a new file: Add a file in the lower left area using drag and drop.

The audio file is uploaded and added to the attachment list.

5. In the attachment list, click the *Use* button next to the audio file you want to include.

The video is included in the preview in the *HTML5 audio* dialog box.

6. Edit the properties of the audio file. Refer to the following sections for detailed information when doing so.
7. Choose *OK*.

The audio file has been added in the editor.

### *Audio Info* tab

You can access the following properties in the *HTML5 audio* dialog box on the *Audio info* tab:

| Function | Description |
|---|---|
| Alignment | Select the alignment of the audio player in the display:<br>• *Center*: The audio player will be centered. Text cannot flow around the audio player.<br>• *Left*: The audio player will be aligned left. If space is available, text will flow around the audio player.<br>• *Right*: The audio player will be aligned right. If space is available, text will flow around the audio player.<br>• *None*: The audio player will not be aligned. Text cannot flow around the audio player. |

### *Advanced* tab

You can access the following properties on the *Advanced* tab:

| Function | Description |
|---|---|
| Autoplay? | Select whether the audio file is played automatically when the user opens the additional information. |

## 4.6 Adding attachments

You want to update a measure with more information and to attach, for example, a promotional brochure related to a sales promotion to that sales promotion as a file. You can add the following attachments to an element in the Marketing Planner:

- You can upload one or more locally saved files as attachments. The maximum size of each file is 100 MB.
- You can attach a link to an external web page.
- You can attach a link to the detailed view of a document in Brand Template Builder module.
- You can attach a download link to an asset from the Media Pool module.

# 5 Planning the budget for marketing measures

You have planned the content of your marketing measures and scheduled them. You now want to distribute your budget among the various individual measures. Choose *>Budget* to switch to the Marketing Planner budget view. You can:

- Enter the planned budget for individual measures manually
- Calculate the monthly budgets automatically
- Set estimates or invoices in the detailed view that are then displayed in the budget view
- Export the budget plan as an Excel file

### Context menu

In the budget view, you can right-click to open a context menu with the following functions:

| Function | Description |
|---|---|
| *Target budget >*<br>*Add target budget* | You open the *Add Target* Budget dialog for the item. The detailed view of the element is displayed in the background on the Target Budget tab. |
| *Target budget >*<br>*Edit target budget* | If a target budget exists for the clicked period, the target budget is opened in the editing dialog. If no or more target budgets exist for the period, the *Target Budget* tab opens. |
| *Invoice >*<br>*Add invoice* | This opens the *Insert Invoice* dialog box for the element. The details view of the element on the *Invoices* tab is displayed in the background. |
| *Invoice >*<br>*Edit invoice* | If an invoice exists for the clicked period, the invoice is opened in the editing dialog. If no or more invoices exist for the period, the tab *Invoice* opens. |
| *Purchase Order >*<br>*Add PO* | This opens the *Insert PO* dialog box for the element. The details view of the element on the *POs* tab is displayed in the background. |
| *Purchase Order >*<br>*Edit PO* | If there is an order for the clicked period, the order is opened in the editing dialog. If there are no or more orders for the period, the *PO* tab opens. |
| *MDF >*<br>*Add MDF* | This opens the *Insert MDF* dialog box for the element. The details view of the element on the *MDF* tab is displayed in the background. |
| *MDF >*<br>*Edit MDF* | If an MDF request exists for the clicked period, the request is opened in the editing dialog. If no or more requests exist for the period, the *MDF* tab opens. |
| *Insert/Edit additional information* | If additional information is displayed, you can access this function in the column context menu. You can use the function to open the details view of the relevant element to edit the additional information. |
| *Insert sum of subbudgets* | You can total all of the planned values that have been entered for the sub-element for the element. Existing planned entries are updated. |

| Function | Description |
|---|---|
| *Insert sum of monthly budgets* | You can total all of the planned values that have been entered for the individual months for the element. |

## 5.1 Entering planned values

You want to enter planned values for your budget plan in the budget view:

The total yearly budget for your marketing plan is `250.000 Euro`. Of this, you budget `40.000 Euro` for `Unternehmenskommunikation` and `75.000 Euro` for `Produkt-Kampagnen`. In the area of `Unternehmenskommunikation`, you distribute the budget between the months `Januar` (`20.000 Euro`), `Februar` (`10.000 Euro`), and `März` (`5.000 Euro`).

**Prerequisites**

You have created the planning elements `Marketingplanung`, `Unternehmenskommunikation`, and Produkt-Kampagnen.

**Step by step**

1. Click the *Month* button in the upper area of the budget view.

This activates the monthly view for the budget plan.

2. On the level of the `Unternehmenskommunikation` element, double-click the cell in the *Planned* column in the `Januar` area.

This activates the input screen.

3. Enter the value `20000` and press ENTER to confirm.

The value is entered in black font in the cell. The thousands separator is added automatically. The parent element adopts the entry automatically (gray font).

4. On the level of the `Produkt-Kampagnen` element, double-click the cell in the *Planned* column in the *January* area.

This activates the input screen.

5. Enter the value `75000` and press ENTER to confirm.

The value is entered in black font in the cell. The thousands separator is added automatically. The entry is added to the existing entry for the parent element automatically. The value is updated to `95.000` (gray font).

6. On the level of the `Unternehmenskommunikation` element, double-click the cell in the *Planned* column in the `Februar` area.

This activates the input screen.

7. Enter the value `10000` and press ENTER to confirm.

The value is entered in black font in the cell. The thousands separator is added automatically. The parent element adopts the entry automatically (gray font).

8. On the level of the *Corporate Communication* element, double-click the *Planned* column in the *March* area.

This activates the input screen.

9. Enter the value `5000` and press ENTER to confirm.

The value is entered in black font in the cell. The thousands separator is added automatically. The parent element adopts the entry automatically (gray font).

10. In the Year budget area, open the context menu for the parent element (`Marketingplanung`) in the *Planned* column.
11. Choose *Insert sum of monthly budgets*.

The monthly budgets are totaled and the value `110000` is entered in the budget cell. Press ENTER to adopt the value. The thousands separator is added automatically.

## 5.2 Target Budgets

A budget plan is drawn up at the beginning of a fiscal year. Normally, these plan values are adjusted after a short time. Budgets are reduced, increased or postponed. To docume nt these changes, use the Budget Targets function.

Record the original specifications in the plan values (see chapter 5.1). Enter changes in the budget targets. You can use custom budget calculations to create columns that calculate the difference between the original plan value and the adjusted target values.

In the budget view, the target budgets for the month and year can be displayed.
The monthly value is the sum of all target budgets assigned to the month via the publish date. For parent elements, the data of the child elements is also added.
The annual and a quarterly value are calculated accordingly from the sum of the monthly values.

Note that you can also create target budgets efficiently using the export/import function, see chapter 5.7.

**Associated tasks**

- Adding a target budget, see chapter
- Editing a target budget, see chapter
- Deleting a target budget, see chapter

### 5.2.1 Adding a target budget

1. Open the detailed view of the element and switch to the *Target Budget* tab.
2. Click *Add*.

The *Add Target Budget* dialog is displayed.

3. Optional: enter the name of the target budget in the uppermost input field.
4. Enter the amount of the target budget in the *Value* field.
5. Select the *Publish date*.
6. Enter the cost type by which the target budget is categorized. You can enter free text or choose a previously made entry.

7. Click *Save*.

You have added a target budget in the detail view.

Note that you can also add a target budget by clicking on the line of the element in the budget view. On the context menu, click *Add Target Budget*.

### 5.2.2 Editing a target budget

1. Open the detailed view of the element and switch to the *Target Budget* tab.
2. Click on the target budget you want to edit.

The target budget is marked.

3. Click *Edit*.

The *Edit Target Budget* dialog opens.

4. Edit the fields as desired.
5. Click *Save*.

You have edited a target budget in the detail view.

Note that you can also edit a target budget by clicking on the line of the element in the budget view. On the context menu, click *Edit Target Budget*. If a target budget is assigned to the month you clicked, this target budget is opened in the editing dialog. If no or more target budgets are assigned to the month, the detailed view of the item opens on the *Target Budget* tab.

### 5.2.3 Deleting a target budget

**Attention!**

The deletion of a target budget cannot be reversed.

1. Open the detailed view of the element and switch to the *Target Budget* tab.
2. Click on the target budget you want to delete.

The target budget is marked.

3. Click *Delete*.

A security prompt is displayed.

4. Click *OK*.

You have deleted the target budget.

## 5.3 Budget views

The budget is initially displayed with the default view. You can use the budget views to create different views that can contain additional or different information. The following data and settings are possible:

- Budget data (see chapter 2.3.1)
- More information (see chapter 2.3.2)
- The currency of the budget data (see chapter 2.3.1)
- The budget scale and decimal places (see chapter 2.3.1)
- The displays for the *Year view* and *Applied configuration* control elements (see chapter 2.3.4)

The budget views are defined by you or another user. Where necessary, saved views can be published for all Marketing Planner users or for specific user groups. Note that you can edit and publish only your own views.
If you want to restore the default view, choose > *Marketing Planner* > *Budget* > *Budget views* > *Default budget view*.
If you open the *Budget views* picklist and select *Manage views*, the following dialog box opens:

In the upper area, you can manage the budget views; for example, you can define the name or select the view that you want to edit. Below that, you can select which columns and other elements are displayed in the view. You can also define the order in which the data is displayed in the planning area: data at the top of the list is displayed in the planning area on the left.

**Note**

For the order of the columns, note that data from the yearly or monthly budget can only be moved as a block and the order of the data within the yearly or monthly budget is fixed.

The default width of the columns is 70 px. You can change it to any width. Note that the yearly and monthly budgets contain several columns. You enter a column width for the yearly and monthly budget and each column is displayed with this width.

**Associated tasks**

- Creating a budget view (see chapter 5.3.1)
- Applying a budget view (see chapter 5.3.2)
- Editing a budget view (see chapter 5.3.3)
- Deleting a budget view (see chapter 5.3.4)

### 5.3.1 Creating a budget view

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.

The *Edit Budget View* dialog box is displayed.

2. Click  in the upper area.

The *Budget View Name* dialog box opens.

3. Enter the name of the view.
4. Choose *OK*.
5. If you want to make the budget view available to other users, click the pencil icon next to the *Access* field.

The *Budget View Access Settings* dialog box opens.

6. Choose whether to publish the view for all Marketing Planner users or for specific user groups.
7. Choose *OK*.
8. In the picklist, select the columns to be included in the view.
9. Define the order of the columns using drag and drop.
10. Enter the width of the columns in pixels.
11. Choose whether budget data is displayed in the working currency or reference currency.
12. Select the budget scale.
13. Choose whether the *Year view* and *Applied configuration* control elements are displayed.

14. Define whether amounts are displayed with decimal places.
15. Click *Save*.

You have created the budget view. The dialog box closes and the budget is displayed according to your settings. Depending on the selected access options, you and other users can select the view in the picklist.

### 5.3.2 Applying a budget view

1. Choose > *Marketing Planner* > *Budget* > *Budget views*.

   The picklist opens.

2. In the bottom area of the picklist, select the saved view that you want to edit.

You have selected the budget view. The budget is reloaded and displayed according to the selected view.

### 5.3.3 Editing a budget view

**Prerequisites**

You have already created a budget view.

**Editing a budget view**

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.

The *Edit Budget View* dialog box is displayed.

2. In the top area of the picklist, select the view that you want to edit.
3. Optional: If you want to change the name, click the pencil icon next to the picklist.

The *Budget View Name* dialog box opens.

4. Change the name of the view.
5. Choose *OK*.
6. Optional: If you want to change the access to the view, click the pencil icon next to the *Access* field.

The *Budget View Access Settings* dialog box opens.

7. Change the access to the budget view.
8. Choose *OK*.
9. Optional: If you want to change the displayed columns, make the following changes:

- Add additional columns.
- Change the order of the columns using drag and drop.
- Change the width of the columns.
- Delete the columns by clicking the X at the end of the line.

10. Optional: Change the settings for the *Currency*, *Budget scale*, *Year view, Applied configuration* and *Display decimal places* entries.
11. Click *Save*.

You have changed the budget view. The dialog box closes and the budget is displayed according to your settings.

### 5.3.4 Deleting a budget view

**Prerequisites**

You have already created a budget view.

**Deleting a budget view**

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.

   The *Edit Budget View* dialog box is displayed.

2. In the top area of the picklist, select the view that you want to delete.
3. Click the recycle bin icon to the right of the picklist.

   A confirmation prompt is displayed.

4. Choose *Yes*.

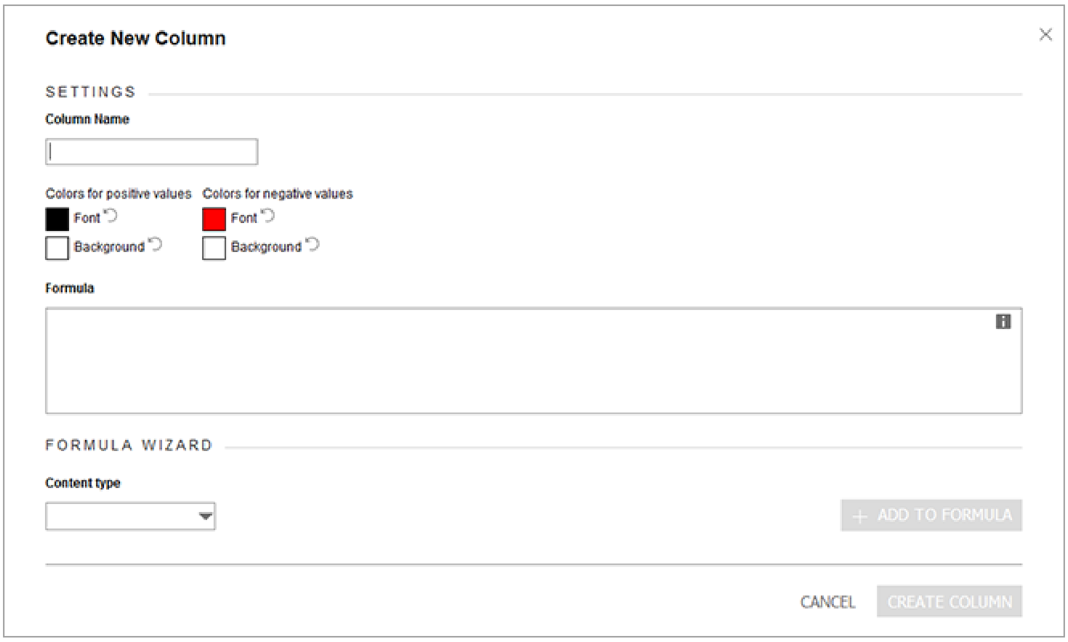
The budget view is deleted.

## 5.4 Custom budget calculations

You can access the budget to create your own budget calculations based on formulas and display them in a column.

You create the column by selecting the *Formula* column type in the *Edit Budget View* dialog box. A dialog box for entering the formula opens. The following operators and operands are available:

- +, -, /, * and ( and )
- Default budget values: Planned, Target, Committed, Actual, Projected, Remaining and MDF
- Fees (see chapter 5.4.2)
- Exchange rates (see chapter 3.10)
- Numbers




Standard budget data, fees and exchange rates are specified based on time. For standard budget data, you can also choose whether the value used in the calculation corresponds to the sum of all the child elements.

For exchange rates, you also specify the currency for which the exchange rate is to be displayed, starting from the reference currency. If no exchange rate is defined for the selected currency or time period, the variable has the value 0.

Of course, you can also include custom budget calculations in a budget export (see chapter 5.7).

You can also choose a color for positive and negative values. By default, positive values are displayed with black font and negative values with red font, both on a white background. You can choose the font color as well as the background color freely.

**Example: Net requirements planning**

In the Marketing Planner, you are managing a number of campaigns that incur fees. For net requirements planning, you want to view the amount of the budget to be planned without the fees. The net planned budget is calculated from the following formula:

$B_{Net} = B_{Planned} - (B_{Planned} * F_{\%} + F_{abs} /(1 + F_{\%}))$

$B_{Net}$: Net planned budget
$B_{Planned}$: Planned budget
$F_{\%}$: Percentage fee
$F_{abs}$: Total of absolute fees

Note that planned budgets and fees must be calculated per month. Since you enter the formula based on time, you must create a column for each month.

For a corresponding example of how to enter the formula above in the Marketing Planner, see chapter 5.4.1.

Note: a prerequisite for displaying the fees correctly is that an administrator must have created them (see chapter 3.11). Furthermore, the fees must be assigned to the elements (see chapter 5.5.1) and the planned budget must be entered for the planning elements.

**Associated tasks**

- Creating custom budget data (see chapter 5.4.1)
- Editing custom budget data (see chapter 5.4.2)
- Publishing custom budget data (see chapter 5.4.3)
- Deleting custom budget data (see chapter 5.4.4)

### 5.4.1 Creating custom budget calculations

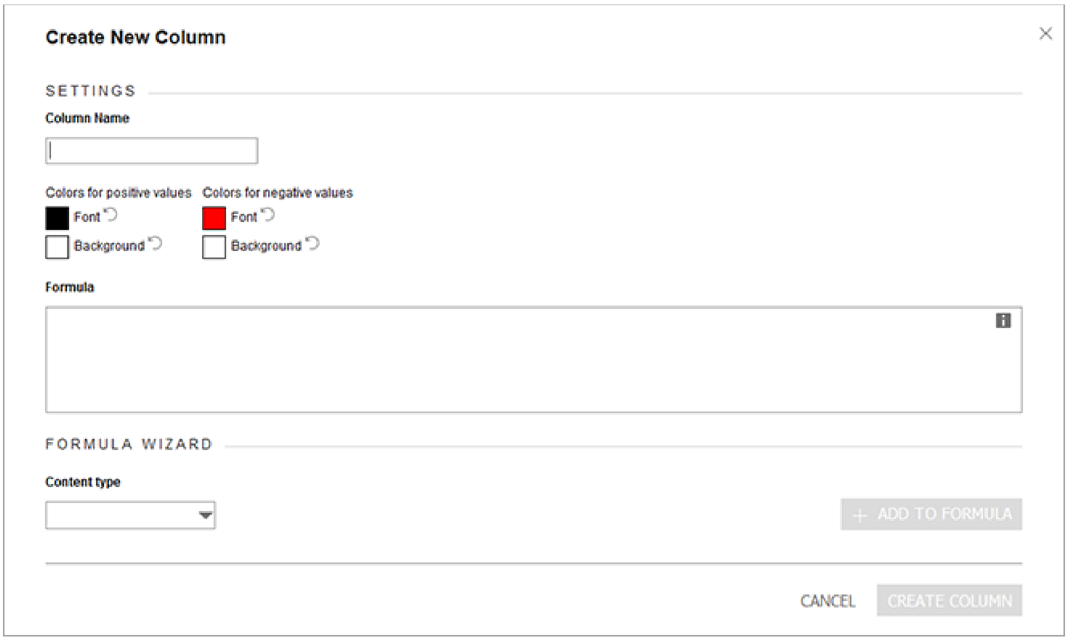
You want to calculate the net planned budget for the month of January. The formula for the calculation is the same as the example in chapter 5.4: $B_{Net} = B_{Planned} - (B_{Planned} * F_{\%} + F_{abs} /(1 + F_{abs}))$

**Note**

For the sake of clarity, the characters +-*/ and () are set in quotation marks in the instructions below. The quotation marks are not included in the entry in the *Formula* field!

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.
2. In the *Select column* dropdown list, select the entry *Formula*.

The *Create New Column* dialog box opens:




3. Enter a name for the column (e.g. *Net planned budget for January*).
4. In the *Formula* field, enter the first part of the formula, the planned budget:
   a. In the *Content type* dropdown list, select the entry *Budget*.
   b. In the *Budget Type* dropdown list, select the entry *Planned*.
   c. In the *Period* dropdown list, select the entry *January*.
   d. If you want to use the total of the child elements for the parent element, activate the checkbox *Sum of all children*.
   e. Click *Add to formula*.

The entry <Budget - Planned - January> is added in the *Formula* field.

5. Enter the characters "- (" after the entry.
6. Add the entry <Budget - Planned - January> again. Alternatively, copy the entry <Budget - Planned - January> and add it at the end of the line.
7. Enter the character "*" at the end.
8. Enter the percentage fee:
   a. In the *Content type* dropdown list, select the entry *Fee*.
   b. In the *Fee* dropdown list, select the entry *Rate of percentage fee*.
   c. In the *Period* dropdown list, select the entry *January*.
   d. Click *Add to formula*.

The entry <Fee - Rate of percentage fee - January> is added in the *Formula* field.

9. Enter the character "+" at the end.
10. Enter the total of the absolute fees:
    a. In the *Content type* dropdown list, select the entry *Fee*.
    b. In the *Fee* dropdown list select the entry *Sum of absolute value fees*.

   c. In the *Period* dropdown list, select the entry *January*.

   d. Click *Add to formula*.

The entry <Fee - Sum of absolute value fees - January> is added in the *Formula* field.

11. Enter the characters "/(1+" at the end.
12. Add the entry <Fee - Rate of percentage fee - January> again. Alternatively, copy the entry <Fee - Rate of percentage fee - January> and add it at the end of the line.
13. Enter the characters "))" at the end.

You have entered the formula. The *Formula* field now contains the following:
<Budget - Planned - January>-(<Budget - Planned - January>*<Fee - Rate of percentage fee - January>+<Fee - Sum of absolute value fees - January>/(1+<Fee - Rate of percentage fee - January>))

14. Choose *Create column*.

The dialog box closes. The *Net planned budget for January* column is added to the list of columns in the current budget view.

15. Click *Save*.

The *Edit Budget View* dialog box closes. The column is displayed in the budget.

### 5.4.2 Editing custom budget calculations

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.
2. If the column is not included in the current view, select the view containing the column.
3. In the column line, click the pencil icon.

The *Edit column* dialog box opens.

4. Edit the name or formula.
5. Click *Save*.

The *Edit column* dialog box closes.

6. Click *Save*.

The *Edit Budget View* dialog box closes. The edited column is displayed in the budget.

### 5.4.3 Publishing custom budget calculations

You publish custom budget calculations by adding the column to a budget view and saving and publishing it. For more information, see chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**.

### 5.4.4 Deleting custom budget calculations

1. Choose > *Marketing Planner* > *Budget* > *Budget views* > *Manage views*.
2. If the column is not included in the current view, select the view containing the column.
3. In the column line, click the X.

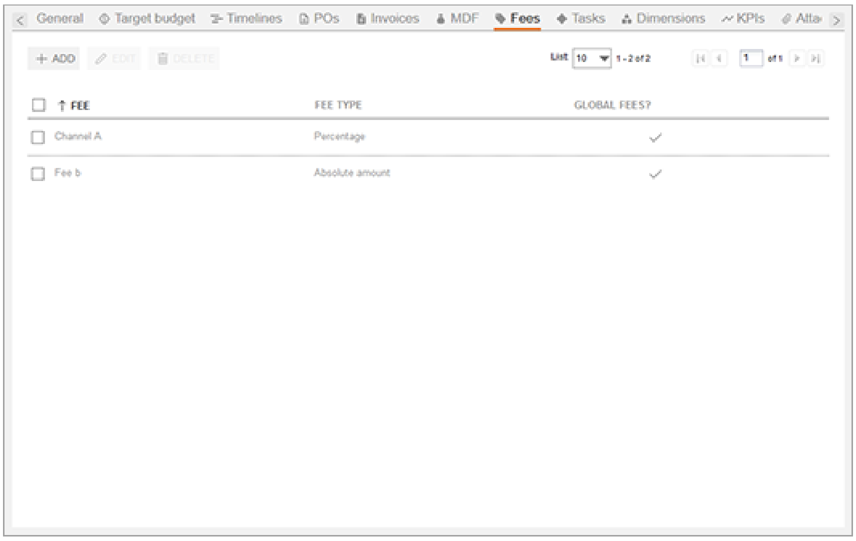
4. The column is removed from the view and therefore deleted.
5. Click *Save*.

The *Edit Budget View* dialog box closes. The column is no longer displayed in the budget.

## 5.5 Fees

Fees are percentage or absolute amounts that are incurred as costs for activities in specific channels. Flagging these fees lets you create a net requirements plan.

An administrator creates fees centrally. As a user, you assign one or more fees to the element on which the campaign is managed in the detailed view on the *Fees* tab. The fee can be one percentage fee or multiple fees with absolute values. You can also overwrite the monthly globally defined fee amounts for an element if you have the appropriate authorization.




The formula for calculating the value of a percentage fee or an overall amount of fees for an element is not defined. BrandMaker provides suitable calculation modules that any customer can use to define their own calculation of fees. In turn, these values can be displayed in *custom budget columns* (see chapter 5.4).

To manage the fees of a large number of elements efficiently, you can export the fees, edit the files and then reimport them (see chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**).

**Associated tasks**

- Assigning a fee to an element (see chapter 5.5.1)
- Editing a fee amount for an element (see chapter 5.5.2)
- Deleting a fee assignment (see chapter 0)

### 5.5.1 Assigning a fee to an element

1. Choose *> Marketing Planner > Calendar* or *> Marketing Planner > Budget*.
2. Open the detailed view of the planning element to which you want to assign a fee.
3. Go to the *Fees* tab.
4. Choose *Add*.

The *Add fee* dialog box opens.

5. In the dropdown list, select the fee that you want to add to the planning element.
6. Optional: if you do not want to use the globally defined fees for the element:
    a. Deactivate the checkbox *Use globally set fees*.
    b. If you deactivate the checkbox, the monthly fees are displayed per year.
    c. Define the fees for each month. If necessary, you can change the year to define additional months.
7. Click *Save*.

The dialog box closes. You have assigned a fee to the element.

### 5.5.2 Editing a fee amount for an element

When you edit the fee amount for an element, you can choose whether you want to use the globally set fee amounts or set the fee amount locally for the element.

1. Choose *> Marketing Planner > Calendar* or *> Marketing Planner > Budget*.
2. Open the detailed view of the planning element whose fee you want to edit.
3. Go to the *Fees* tab.
4. Click the line of the fee that you want to edit.
5. Click *Edit*.

The *Edit fee* dialog box opens.

6. Activate or deactivate the checkbox *Use globally set fees*.
7. If you deactivate the checkbox, you define the fee amount for the element for all the relevant months and years.
8. Click Save.

The dialog box closes. You have edited the fee amount for the element.

### 5.5.3 Deleting a fee assignment

**Attention!**

You cannot reverse the deletion of a fee assignment. Fee amounts that are entered locally for an element are deleted and cannot be restored.

1. Choose > *Marketing Planner* > *Calendar* or > *Marketing Planner* > *Budget*.
2. Open the detailed view of the planning element whose fee assignment you want to delete.
3. Go to the *Fees* tab.
4. Click the line of the fee whose assignment you want to delete.
5. Choose *Delete*.

A confirmation prompt is displayed.

6. Choose *OK*.

You have deleted the fee assignment.

## 5.6 Entering an order

You want to enter a PO for a planned measure in your budget plan so that you can have the latest overview of the costs to be expected. For this, the value of an entered order is automatically transferred to the *Committed* column for the year budget and the relevant month.

1. Open the details view of the element to which you want to add a PO.
2. Go to the *POs* tab.
3. Choose *Add*.

The *Add PO* dialog box opens.

4. Enter the mandatory properties as a minimum. Refer to the following table.
5. Click *Save* to confirm your entries.

The entered value is automatically entered in the corresponding cells in the *Projected* column of the yearly budget and of the month in which it is due. If several orders have been entered, the individual values are added together.

**The properties of an order**

| Property | Description |
|---|---|
| *Name of the order* | Define the name with which the PO is displayed in the detailed view. If you do not enter a name, the PO is displayed in other lists according to the following pattern: [order due date][order value]. |

| Property | Description |
|---|---|
| *Value (in working currency)* | Enter the order amount in the working currency of the planning element (maximum: 99,999,999,999.99). The value is displayed in the *Committed* column in the budget plan. |
| *Publish date* | Define the time at which the PO is due so that the entered values can be transferred to the *Committed* column for the relevant month. |
| *Job number* | Enter the PO number assigned to the PO. |
| *Reference number* | Enter the reference number generated when the invoice belonging to the PO was posted. |
| *Department* | Define the cost center to which the estimate is to be posted. |
| *Cost type* | Enter the cost type by which the PO is categorized. You can enter free text or choose a previously made entry. |
| *Supplier* | Define the supplier from whom the PO was received. |
| *Responsible person* | Define the responsible user. |
| *Comment* | Enter any additional information. |
| *Calculation status* | Activate this checkbox to "freeze" the value of an order. The status of the order is taken into account when the remaining budget and projected budget are calculated. This field cannot be imported. |
| *Attachments* | Add a file attachment (a PDF file or link, for example). The date on which you created the attachment is added automatically. Users with access to the *Attachments* tab can download the files by clicking them in the *Attachments* column. |
| *Linked Invoices* | Select an added invoice from the dropdown list to link it with the PO. If one or more invoices are linked to the PO, the dialog box displays the remaining budget. The remaining budget is calculated by subtracting the assigned invoices from the order value. |

## 5.7 Importing and exporting budget data

Specific budget data can be automatically imported and exported so that the user does not have to manually edit a large number of records. This is the case for the following budget data:

- Invoices
- POs
- Fees
- Target budgets
- External IDs
- Planned budgets

Please refer to chapter 0 to find out which properties of invoices, orders, fees, target budgets, external IDs, and planned budgets can be imported and exported.

**Allocation of data records to planning elements**

The data records are uniquely assigned to the planning elements using an ID. You can choose between two IDs:

- Element ID: The element ID is created automatically when you create an element and is displayed on the *General* tab in the detailed view.
- External ID: The external ID is manually maintained in the detailed view of the element on the *General* tab. If you maintain a corresponding ID in a structured dimension, you can use the dimension value if the *external ID* field has not been edited yet. For more information, see the chapter *Transferring an ID from a dimension* on page 169.

**Note**

If you import the External ID, the assignment can only be made using the Element ID.

During an import, the ID must be specified in the Excel file for a data record. The ID is not automatically included in an export. If you would like to reimport exported data (after editing or making corrections, for example), you must include the ID in the export. If you do not want to reimport the records, you can export other properties for allocation to the element, such as the name of the element or its path in the tree structure.

### 5.7.1 Exportable and importable properties

#### Element

The following table provides an overview of the properties of the element which can be exported. You must use either the external ID or the element ID as a mandatory field to ensure a correct assignment.

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *External ID* | The external ID can be used to uniquely assign a data record to a planning element when importing data. | Yes | Text |
| *Element ID* | The element ID can be used to uniquely assign a data record to a planning element when importing data. | Yes | Text |
| *Name* | Element name | No | — |
| *Path* | The path to the element in the tree structure | No | — |
| *Working currency* | The working currency of the element | No | — |

#### Invoices

The following table provides an overview of an invoice. All properties can be exported.

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Name of the invoice* | Enter a name for the invoice. If you do not enter a name, the invoice is displayed based on the following pattern in other lists (for example, for a request for a marketing development fund): [invoice date][invoice amount]. | Yes | Text |
| *Amount (in working currency)* | Enter the amount of the invoice in the working currency of the planning element. | Yes, mandatory field | Number |
| *Booking Date* | Enter the booking date. | Yes | Date |
| *Date* | Enter the invoice date. | Yes, mandatory field | Date |
| *Payment status* | Activate the checkbox if the invoice is paid. | Yes | Text (true, false) or number (0/1) |

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Job number* | Enter the job number. | Yes | Text or number |
| *Reference number* | Enter the reference number. | Yes | Text or number |
| *Invoice number* | Enter the invoice number. | Yes | Text or number |
| *Department* | Enter the cost center. | Yes | Text |
| *Cost type* | Enter the cost type. | Yes | Text |
| *Supplier* | Enter the supplier. | Yes | Text |
| *Responsible person* | Enter the responsible person. | Yes | Text |
| *Comment* | Enter a comment. | Yes | Text |
| *Linked PO* | Link the invoice to a PO. This allows you to compare a PO with its corresponding invoice easily. | No, but a link can be activated in the import. | — |
| *Attachments* | Add a file attachment (a PDF file or link, for example). The date on which you created the attachment is added automatically. | No | — |
| *Imported* | This status indicates whether an invoice was imported. | No | — |
| *MDF status* | This status specifies whether a market development fund was requested for the invoice, and the status of the request. | No | — |

## POs

The following table provides an overview of the properties of an order. All properties can be exported.

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Name of the order* | Define the name with which the PO is displayed in the detailed view. If you do not enter a name, the PO is displayed in other lists according to the following pattern: [order due date][order value]. | Yes | Text |
| *Value (in working currency)* | Enter the order amount in the working currency of the planning element. The value is displayed in the *Committed* column in the budget plan. | Yes, mandatory field | Number |
| *Date* | Define the time at which the PO is due so that the entered values can be transferred to the *Committed* column for the relevant month. | Yes, mandatory field | Date |
| *Job number* | Enter the PO number assigned to the PO. | Yes | Text or number |
| *Reference number* | Enter the reference number generated when the invoice belonging to the PO was posted. | Yes | Text or number |
| *Department* | Define the cost center to which the estimate is to be posted. | Yes | Text |
| *Cost type* | Define the cost type according to which the PO is to be categorized. | Yes | Text |
| *Supplier* | Define the supplier from whom the PO was received. | Yes | Text |
| *Responsible person* | Define the responsible user. | Yes | Text |
| *Comment* | Enter any additional information. | Yes | Text |
| *Calculation status* | Activate this checkbox to "freeze" the value of an order. The status of the order is taken into account when the remaining budget and projected budget are calculated. This field cannot be imported. | No | — |
| *Attachments* | Add a file attachment (a PDF file or link, for example). The date on which you created the attachment is added automatically. | No | — |

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Linked Invoices* | Select an added invoice from the dropdown list to link it with the PO. If one or more invoices are linked to the PO, the dialog box displays the remaining budget. The remaining budget is calculated by subtracting the assigned invoices from the order value. | No | — |

## Fees

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Fee name* | Name of the fee | Yes, mandatory field | Text |
| *Fee type* | Specification of the fee type, either *Percentage* or *Absolute amount*. | No | — |
| *Use globally set fees* | Specification of whether the globally set fee amounts or the fee amounts defined locally for the element are used for the element. | No | — |

## Target budgets

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| *Name* | Name of target budget | Yes | — |
| *Value* | Amount of the target budget | Yes, mandatory field | — |
| *Publish date* | Assignment to a month | Yes, mandatory field | — |
| *Cost Type* | Define the cost type according to which the target budget is to be categorized. | Yes | Text |

### External ID

**Note**

The external ID can only be imported but not exported.

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| External ID | ID of an element, must be mapped with the element ID | Yes | Number |

### Planned budget

The following table provides an overview of the planned budget data of an element. All data can be exported.

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| Annual budget | Planned budget for entire year | Planning type *Top-Down*: yes<br>Planning type *Bottom-Up*: no | Number |
| January | Planned budget for the month of January | Yes | Number |
| February | Planned budget for the month of February | Yes | Number |
| March | Planned budget for the month of March | Yes | Number |
| April | Planned budget for the month of April | Yes | Number |
| May | Planned budget for the month of May | Yes | Number |
| June | Planned budget for the month of June | Yes | Number |
| July | Planned budget for the month of July | Yes | Number |
| August | Planned budget for the month of August | Yes | Number |
| September | Planned budget for the month of September | Yes | Number |

| Property | Description | Importable | Cell style for import |
|---|---|---|---|
| October | Planned budget for the month of October | Yes | Number |
| November | Planned budget for the month of November | Yes | Number |
| December | Planned budget for the month of December | Yes | Number |

### 5.7.2 Export

The budget data export function allows you to export the budget-related data of an element from the Marketing Planner. If needed, you can include the data of sub-elements in the export. You export invoices, POs, fees, target budgets, or planned budgets to an Excel list.

**For which elements can data be exported?**

You can export the data from any element.

**What effect does a filtered view have on the export?**

You can only export the data of elements which you can see. You can only export the data of displayed elements if the planning element display is filtered at the point of the export.

**Specified timeline**

For invoices, POs, and target budgets, you can select whether the export should cover the data from all years or a specific year. If you select a specific year, you can restrict the period even further, e.g. to a month or a period of two weeks. Whether an invoice, an order or a target budget is included in an export depends on whether the *Publish Date* property lies within the period considered.

An export covering multiple years is not possible for the root element. You can export a complete year or a section of a year for the root element.

Planned budgets can only be exported for the full year selected in the budget view. For fees, selecting a year is not relevant.

**Associated task**

- Export, see chapter 5.7.2.2

#### *5.7.2.1 Export file*

The file in which the records are exported has the following characteristics:

**Format**

The format of the file is XLSX.

**Filename**

The file name has the following structure:

BrandMakerExport_[Date]_BudgetRelevantData.XLSX

**Table setup**

All of the data is written to the first table in the Excel file. The first row contains the names of the exported properties. The subsequent rows contain the data records.

#### *5.7.2.2 Export*

1. Choose > *Marketing Planner* > *Calendar* or > *Budget*.
2. Right-click on the name of the element for which you would like to export data.

   The context menu opens.
3. Choose *Export Budget Data*.

   This will open the *Export budget-related data* dialogue box.
4. Choose whether the data of sub-elements should be included in the export.
5. Select the type of data which you would like to export: *Invoices*, *POs*, *Fees* or *Planned Budgets*.
6. If you export invoices or POs: Select the period that you want to export (for example, *2017* from *August 1* to *August 31*).
7. Select the data to export, e.g. *Element - name*, *PO - name*, *PO - value* or *Invoice - amount*.
8. Choose *Export*.

The data is exported and written to an Excel file.

### 5.7.3 Import

The budget data import allows you to automatically import a large amount of budget-related data to the Marketing Planner. You import invoices, POs, fees, target budget, external IDs, or planned budgets, which are collected in an Excel list.

**Prerequisites for an error-free import**

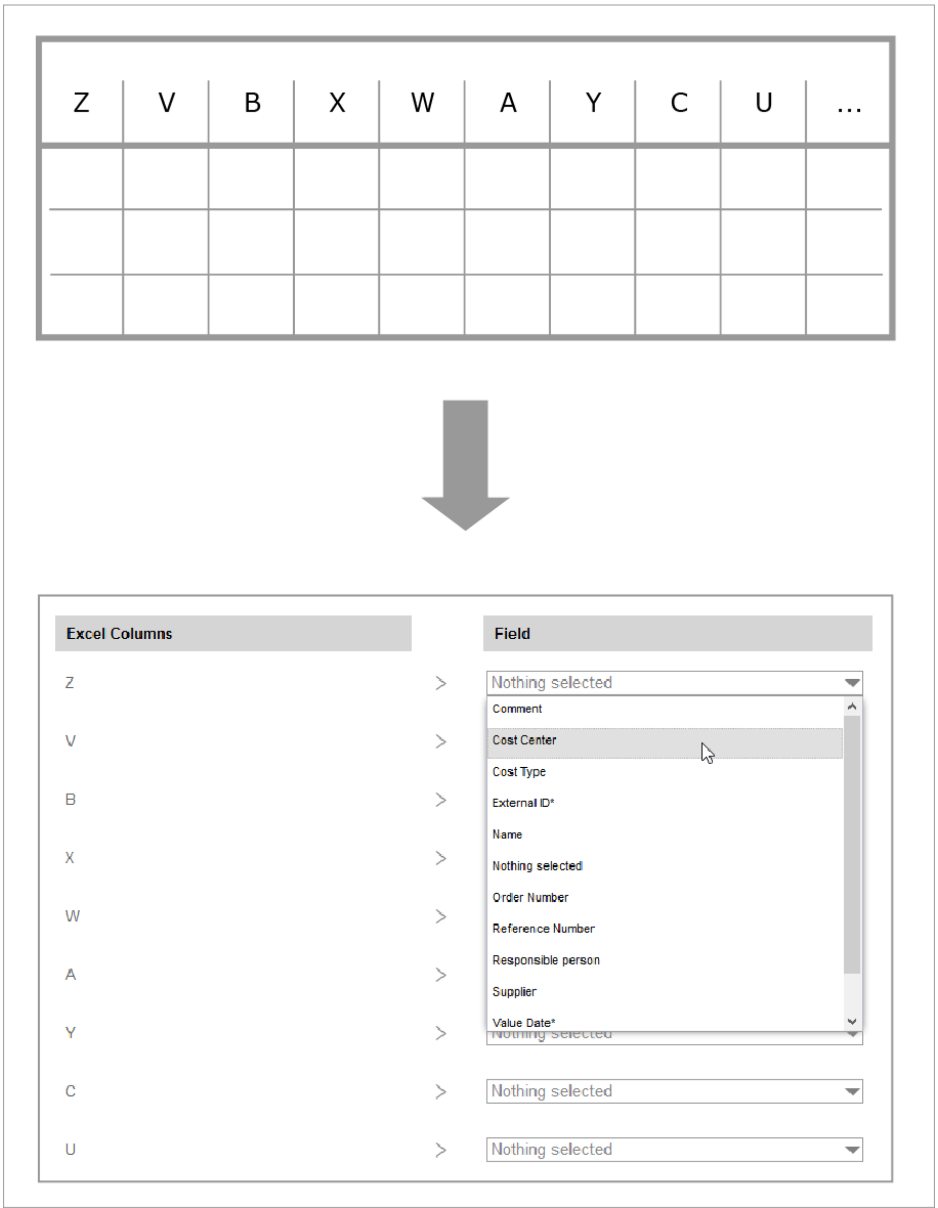
In order for an import to be successful, the following prerequisites must be met:

1. The file meets the following requirements:
   - Microsoft Excel 2010 or Microsoft Excel 2013, file format XLSX.
   - Maximum file size: 20 MB
   - The file must correspond to the specifications in the chapter *File structure* on page 167.
2. The cells of the columns are formatted according to the data they contain. For information about how you must format the fields, see chapter 0.

> **Note**
>
> If you require an Excel file with appropriately formatted columns, export the fields (see Exporting budget data on page 160 for more information).

### Mapping data to be imported to the fields in the Marketing Planner

When you import an Excel file, the labels of the first row are displaced as a column header. You can use any label you like, e.g. the letters Z, V, B, etc., as shown in the illustration.




The second stage of the import process involves mapping the Excel columns to the fields in the Marketing Planner. This means that you can select a field in the Marketing Planner for each column. The mandatory fields (marked with an *) must be mapped. Each field in the Marketing Planner can only be mapped once.

You do not have to import every column in the Excel file. If you do not want to import a column, do not assign a field in the Marketing Planner to it. This means that the Excel file may contain far more data than is actually necessary for the import into the Marketing Planner.

### Manually created and imported data

The Marketing Planner distinguishes for invoices, orders, and target budgets by determining whether they were created manually or via import.

Manually created invoices, POs, and target budgets are not changed by an import. If you make a manual change to an imported invoice, PO, or target budget, the invoice, PO, or target budget will be marked as manually created. This is also the case if you request a market development fund for an imported invoice. The invoice or PO can then no longer be deleted or changed by an import.

### Delta and Full Upload

When importing invoices, orders, target budgets and the external ID, you can choose between the following behaviors:

> **Note**
>
> Both options may not be available in your system. The administrator chooses which options are enabled in your system in the system setting *import.options.available*. If you have any questions, please contact your system administrator.

- *Budget Data Import (Delta Upload)*: Use this setting if you would like to add new invoices, POs, target budgets, or external IDs to the elements at regular intervals. The import file must therefore contain a differential level.
  Previously imported invoices, POs, target budgets, or external IDs are not overwritten and are permanently marked as manually created. This means that previously created invoices, POs, target budgets, or external IDs cannot be completely overwritten by an import.
- *Budget Data Import (Full Upload)*: If you perform the import again using this option, imported data will be completely replaced by the data in the new import. Therefore, an import for a planning element not only needs to contain a differential level, but also needs to contain all invoices or POs to be imported for an element.

Planning budgets and fees do not distinguish between data that has been created manually or via import. An import completely overwrites the element data that was created beforehand and must therefore contain all of the data for the element.

### Assignment to years

You also choose the year for which invoices, POs, target budgets, or planned budgets are imported. For planned budgets, you must always specify a year. Each time that you import planned budgets, you overwrite the data already created for the selected year.

For invoices, orders, and target budgets, you have two options:

- You import all of the objects contained in a file in one overall import. When you do this, all of the invoices, POs, and/or target budgets are imported. The records will be assigned to different years based on the date (for invoices) or due date (for orders).
- You import objects with a publish date that matches the year selected by you. Other objects are ignored and listed in the result report.

Fees are generally assigned to an element. The rate of the fees is defined for each month either globally by an administrator or locally for the element by the user; as a result, fee rates cannot be changed through an import.

**Automatically linking invoices to orders**

You can link imported invoices to orders automatically. In order to do this, a PO must exist in the same year as the invoice date with an order number or reference number which matches the invoice. Please note that you must decide on an assignment method (order number or invoice number) for each import. The Excel file must also contain a column with a reference number or a number, and this column must be imported (see previous section *Mapping data to be imported to the fields in the Marketing Planner*).

When linking invoices to POs, you can also decide to activate the calculation status for linked orders to "freeze" the value. In such cases, the PO will be considered manually created and cannot be changed by an import.

Please note that you can link an invoice to exactly one PO; if multiple links to a PO are detected during an import, the invoices will not be imported. Details will be displayed in the Log section.

If you want to link the invoices, but no linkable POs are found during the import, the invoices will still be imported. Detailed information is provided in the Log section.

**Associated tasks**

- *Import* (page 167)

### 5.7.3.1 File structure

The import file must be configured as follows:

- Only the first table of the file is used.
- The top row contains the definitions that describe the values entered in the column, such as *Amount*. The labels in the table do not have to match the labels of the properties in the Marketing Planner. Each invoice and each PO or planning budget of an element is entered in subsequent rows.
- The Excel file must contain a column in which either the external ID or the element ID of the corresponding planning element is entered for each invoice and/or PO and each planned budget. The import function assigns the invoices to the planning elements using the ID. The external ID is maintained in the detailed view of the planning element on the *General* tab. The element ID is created automatically when you create an element and is also displayed on the *General* tab in the detailed view.

**Other mandatory fields**

- Invoices: In addition to the ID, the file must contain filled columns for the mandatory fields *Amount* and *Publish date*.
- Orders and target budgets: In addition to the ID, the file must contain filled columns for the mandatory fields *Value* and *Publish date*.
- Fees: in addition to the ID, the file must contain a filled column for the mandatory *Fee name* field. Names entered in the column must exactly match the name of a fee created under > *Marketing Planner* > *Settings* > *Fees*.

**Note**

Note that only one *Percentage*-type fee can be assigned to a planning element. If a file for an element contains multiple *Percentage*-type fees, only the highest-level fee is created.

**Example for invoices**

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | **ID** | **Bill Name** | **Sum** | **Booking Date** | **Date** | **Responsible** |
| 2 | bbb1234 | Order broschures | 500 | 19.05.2015 | 28.05.2015 | John Doe |
| 3 | bbb1235 | Photoshooting | 2500 | 20.05.2015 | 28.05.2015 | Max Mustermann |
| 4 | bbb1235 | Layout | 1599 | 23.05.2015 | 30.05.2015 | Jane Public |
| 5 | bbb1236 | Order Leaflets | 450 | 21.05.2015 | 29.05.2015 | Max Mustermann |

### *5.7.3.2 Import*

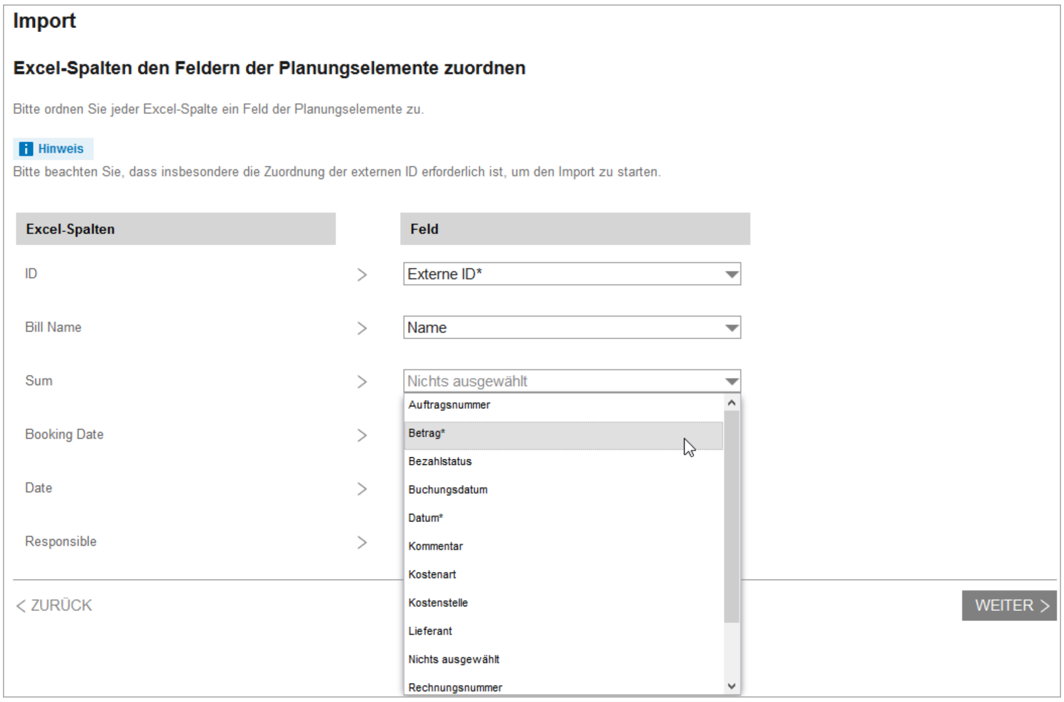
1. Choose > *Marketing Planner* > *Tools*.
2. In the left navigation pane, choose:

- *Budget Data Import (Delta Upload)* if the Excel file includes a delta state.
- *Budget Data Import* if the Excel file contains all of the invoices or orders for the planning elements.

3. In the *Import* field, select which budget-relevant information you would like to import, either *invoices*, *POs*, *fees*, *target budget*, *external ID*, or *plan*.
4. If you import invoices, orders, target budget, or planned budgets:
   In the *Year* field, enter the year for which the data is being imported. For invoices, orders, and target budgets, select *Import all* if you want to import invoices, POs and target budgets from all of the years.
5. Drag and drop your file to the *Excel file* section or click to search for files.
6. Click *Next*.

You now go to the second step of the import. All columns of the Excel file are listed here.

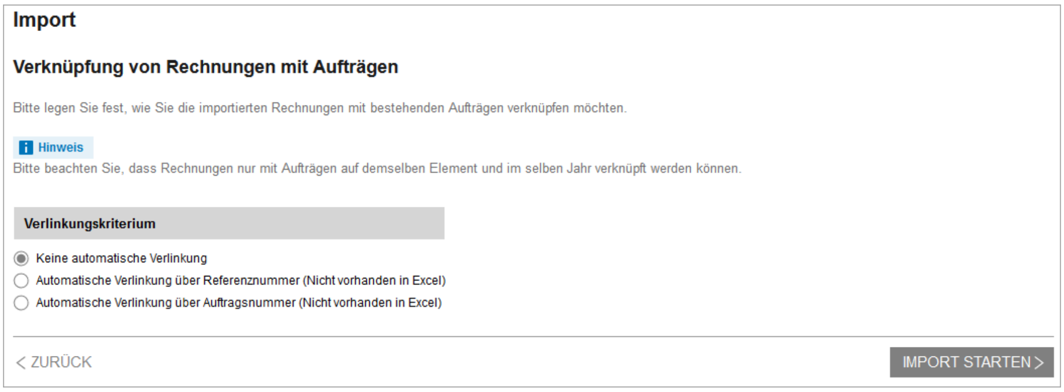
7. In the Marketing Planner, choose the appropriate field for each column that has content that you require.




8. When importing invoices:

a. Click *Next*.

Step 3 is displayed.




b. If you would like to link invoices with orders automatically, select the linking criterion:

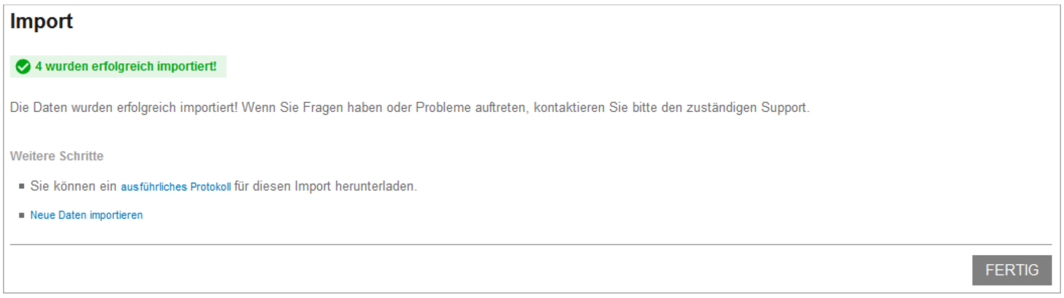
- Link using reference number
- Link using order number

These options can only be activated if:
- The Excel file contains a column with reference numbers or order numbers.
- You mapped this column to the relevant property in the previous step.
Please note that even though you are importing both properties, only one linking option can be selected.

c. If you would like to close linked POs automatically, select *Yes* from the drop-down list on the right.

9. Choose *Start import*.

The import is carried out. The result will be displayed on the next page. You can download a detailed report or start a further import.



### 5.7.4 Transferring the ID from the dimension

**Prerequisites**

- You have created a *Structured*-type dimension.
- The dimension is filled for the elements.
- The *External ID* field for the elements is not edited yet.

**Transferring the ID from the dimension**

1. Choose > *Marketing Planner* > *Tools*.
2. In the *Year field*, choose the year for whose elements you want to transfer the ID from a dimension.
3. In the lower area, click the link *Transfer existing dimension value into the External ID field*.

The *Transfer dimension* dialog box opens.

4. In the *Dimension* field, choose a dimension whose value you want to transfer to the *External ID* field.
5. Click *Save*.

The function checks the elements of the selected year. In the case of elements for which the *External ID* field is not edited yet, the value of the dimension is copied to the field. If the *External ID* field is already edited for the element, the dimension value is not copied.

## 5.8 Exporting the status of the budget

Use this export function if you want to export planned budgets and receive an update of the current status of different budget values, e.g. target compared to actual values. This function can be used for a year or a specific part of a year. It also uses all of the current settings for the budget view. This means that the configuration of the year, the annual view, the budget columns and how the elements are filtered have an impact on what is exported.

1. Choose > *Marketing Planner* > *Budget*.
2. In the budget view, select the year whose budget you want to export.
3. Select *Month* for the annual view in which you want to receive the values.
4. Select the budget view that you want to export.
5. Filter the planning elements if you only need the data for specific elements.
6. Choose .

This opens the *Exports* dialogue box. The output format *Excel Export* is already pre-selected, as the budget plan can only be exported as an Excel file.

7. From the top picklist in the *Settings* area, choose:

- *Export whole calendar*, i.e. the data for a whole year is exported.
- *Export current view*, i.e. the data for a period within a year is exported. Next, select the timeline in the date fields.

8. Activate the *Highlight changes* checkbox to highlight the planning elements that are created and/or changed within a specific time span in the exported file.

This expands the input screen.

9. Select the time span within which the changes were made. Specify whether newly created and/or changed planning elements are highlighted.

10. To make the export clearer, activate the *Highlight parent elements* checkbox if necessary.

11. If you want to include the markers of the planning elements in the export, select the *Include markers* checkbox.

12. From the bottom picklist in the *Settings* area, choose:

- *Download export* if you want to save the export.
- *Send Export via E-Mail* if you want to send the export directly to another user by e-mail.

13. You can use the *Search for recipients* search field to select the e-mail recipient.

The overview table displays all the users that have been selected as recipients. You can delete users from the recipient list. The *Access* column shows whether the user is authorized to use the Marketing Planner.

14. You can enter text for the *message*, if required. You can also send the e-mail without any message text.

15. Choose *Export*.

The export is generated. Depending on your selection, you can save/open the generated file or the export is sent to the selected recipients automatically.

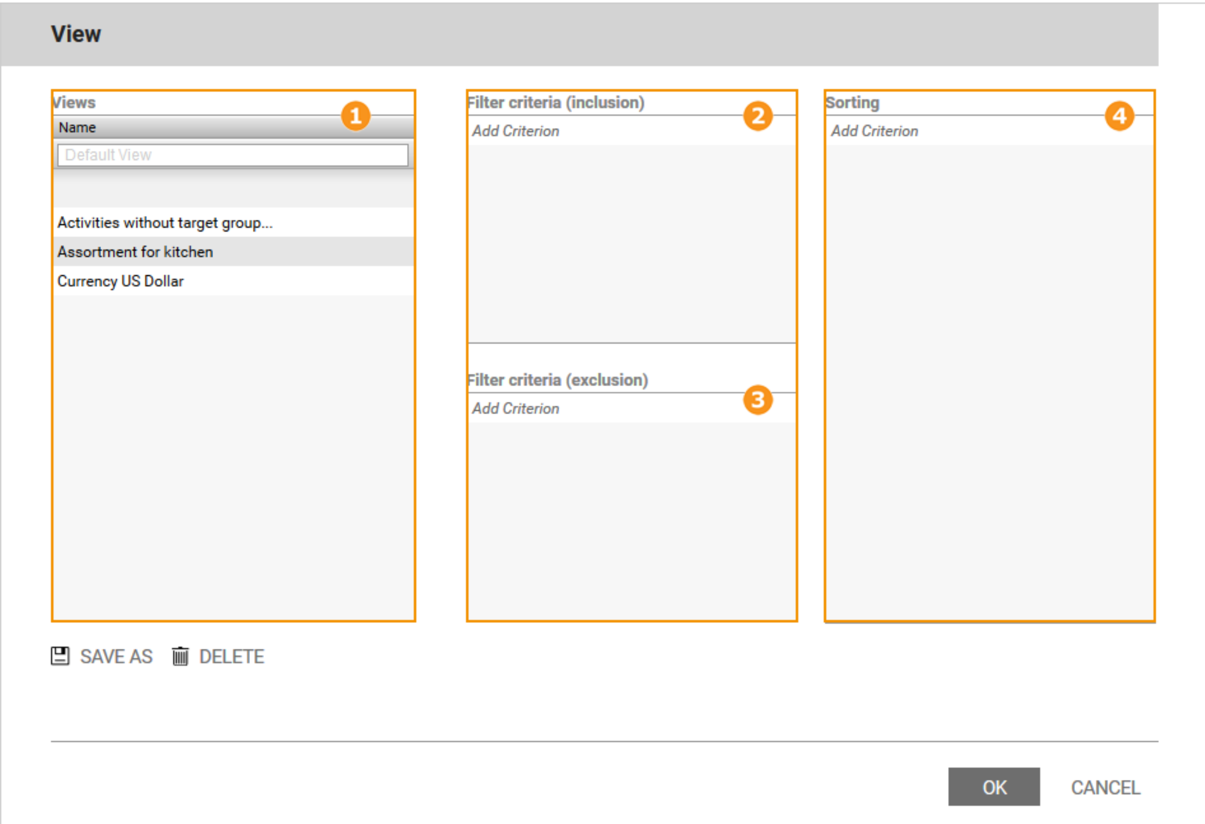
# 6 Filtering and sorting elements

You can define views and filter criteria to control the tree structure displayed in the calendar and budget views and for reports. You can:

- limit the view to specific elements of the tree structure,
- exclude specific elements of the tree structure,
- save an entered view to set it and use it again as required,
- publish a view so that other users can access the view that you have saved.

**How it works:**

In the calendar or budget view, click *View* to open the sorting options for the planner view. The following dialog box opens:




| Area | Description |
|---|---|
| 1 Views | This area lists the saved views. You can also provide a name for a saved view. |

| Area | Description |
|---|---|
| 2 and 3 filter criteria | In the area in the center of the dialog box, you enter the criteria for a filter. In the top list (2), you add the criteria that an element must meet for it to be displayed. In the bottom list (3), you enter the exclusion criteria. An element is not displayed if it meets any of these criteria.<br><br>For more information about the available criteria, see *Criteria for filters and sorting* on page 174. |
| 4 Sorting criteria | In the right-hand area of the dialog box, you enter the sorting criteria.<br><br>For more information about the available criteria, see *Criteria for filters and sorting* on page 174. |

### Logically linking the filter criteria

If you choose criteria in both lists (2 and 3), the exclusion criteria have priority. That means that elements that meet the criteria in both lists are not displayed.

You can enter multiple criteria in both lists. If you enter multiple criteria, the criteria are linked with an AND-link. That means that all the criteria in a list must be met for the element to be displayed (list 2) or excluded (list 3).

If you define multiple values for a criterion, they are linked with an OR-link. That means that one value for each criterion must match.

If you want a number of different values for a property to be met, enter this property as two different criteria, each with different values.

**Example:**

You want to display elements that contain timelines in two categories, for example, print and online marketing.

If you want to display elements that contain timelines with both categories, create two criteria (list 2): One criterion with the category "Print" and one criterion with the category "Online Marketing".

If you want to display elements that contain timelines in at least one of the categories, create one criterion (list 2). Assign both values to this criterion. The result displays all of the elements that contain at least one period with one of the categories.

**Publishing of saved views**

You can make saved views available to other users. When you save a view, it is initially only accessible by you. You can then choose whether to make the view available to all users or to a specific group of users. Other users can use the saved view but cannot change it. For more information, see Saving a view on page 180.

**When are filters and sorting criteria reset?**

If you use a saved filter or a saved set of sorting criteria, the view will be filtered or sorted until it is reset by you. Even ending a session and logging in again will not reset the view. A message will be displayed if the planning elements are filtered or sorted after you login.

To reset a filter or sorting criteria, choose *Standard View* from the *View* dropdown list.

**Updating filtered views**

If a planning element is changed and no longer meets the criteria of a filtered view, the view is automatically updated and the element is hidden.

## 6.1 Criteria for filters and sorting

**Filters**

| Name | Description |
|---|---|
| *Start Date* | You restrict the view to elements with content (timelines, tasks, jobs, KPIs, and invoices) on or starting from the specified date at the earliest. Elements with content on or starting from a date before the specified date are hidden. |
| *End Date* | You restrict the view to elements with content (timelines, tasks, jobs, KPIs, and invoices) on or ending on the specified date at the latest. Elements with content on or starting from a date after the specified date are hidden. |
| *Responsible person* | You can select one or more responsible users to restrict the view of the tree structure. |
| *Subtree* | You can select one or more planning elements of the tree structure to restrict the view. |
| *Marker* | You can select one or more markers according to which the view is to be filtered. |
| *Category* | You can select one or more categories in order to restrict the view of the tree structure. |
| *Fee* | You filter the view by one or more fees assigned to the elements. |

| Name | Description |
| --- | --- |
| *Tree Level* | You can select one or more levels to restrict the view of the tree structure. You can restrict the view up to the 20th level. |
| *Leafs* | Use *Leafs* as criteria to restrict the view to the lowest tree level. |
| *Currency* | This restricts the view to elements with the specified currency. |
| *Element name* | This restricts the view to elements whose name contains the criterion value. |
| *Element type* | This restricts the view to elements of a specific type. |
| Dimensions | You can select one or more dimensions or their values in order to restrict the view of the tree structure. |

### Sorting

You can sort a view in ascending or descending order:

| Name | Description |
| --- | --- |
| *Dimension* | You can select a dimension to group together the individual elements of the marketing plan in a list below the selected dimension value. For example, you can sort all the elements according to a specific target group. Elements that are not linked to the selected dimension are listed under *Other elements*. |
| *Start Date* | This sorts the tree structure in ascending or descending order so that a chronological overview of the elements is displayed. All the date entries that are found (such as the date of an invoice or the date of a timeline, for example) are taken into account for the sorting. Elements without date entries are listed under *Other elements*. |
| *Responsible person* | The elements of the tree structure are grouped together in a list below the responsible person. Elements that do not have a responsible person are listed under *Other elements*. |

## 6.2 Filtering and sorting according to a dimension

In the calendar and budget view, you want to display only those planning elements that are linked to a specific dimension (a target group, for example). In addition, you want to arrange the display of these elements according to their branch.

**Prerequisites**

You have created two dimensions of the *Multi Selection* type (called `Filiale` and `Zielgruppe`, for example) and defined the individual branch offices and target groups as values.

**Step by step**

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. Click *Add Criterion* in the *Filter criteria (inclusion)* area.
3. From the dropdown list, select the dimension (`Zielgruppe`, for example) that you want to use as a filter criterion.

This activates the input screen.

4. Choose *Add Criterion*.
5. From the dropdown list, select the value of the dimension based on which the view is to be filtered.
6. Click the *checkmark* within the selection area to confirm your selection.

If required, you can add more values using the dropdown list.

7. Click the *checkmark* outside the selection area to complete your selection of the dimension values.
8. Choose *OK.*

This closes the dialog box. The screen content is then reloaded. The planning elements assigned to the selected target group are displayed filtered by their branch office.

## 6.3 Listing measures for a branch office by date

You are planning the marketing measures for multiple branch offices centrally. You now want to list the measures for a selected branch office. You also want to arrange the display of the measures in the view by date.

**Prerequisites**

You have created a dimension of the Multi Selection type (called `Filiale`, for example) and stored the individual branches as selection values.

**Step by step**

1. Choose > *View* > *Sort and Filter*.

   This opens the *View* dialog box.

2. Click *Add Criterion* in the *Filter criteria (inclusion)* area.
3. Select the entry *Branch* from the dropdown list. In the selection area, choose *Add Criterion*.
4. From the dropdown list, select the branch office whose measures you want to list.
5. Click the *checkmark* to confirm your selection.
6. Click the *checkmark* to confirm the selected filter criteria.
7. In the *Sorting* area, choose *Add Criterion*.
8. Select the entry *Start Date* from the dropdown list.
9. Choose one of the following entries from the dropdown list:

- *Ascending*: This displays the branch office measures starting with the earliest date.
- *Descending*: This displays the branch office measures starting with the most recent date.

10. Click the *checkmark* to confirm your selection.
11. Choose *OK* to close the dialog box and to apply the filter criteria.

The screen content is then reloaded. The measures for the selected branch offices are then displayed by date.

## 6.4 Excluding categories

To filter the view, you want to hide certain elements with specific categories for the calendar and budget view.

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. In the *Filter criterion (exclusion)* area, click *Add Criterion*.
3. Select the entry *Category* from the dropdown list.

This activates the input screen.

4. Choose *Add Criterion*.

Another dialog box opens.

5. From the dropdown list, select the *category* that you want to exclude from the view.
6. Click the *checkmark* within the selection area to confirm your selection.

Repeat the previous steps to add more categories if required.

7. Click the *checkmark* outside the selection area to complete your selection of one or more categories.
8. Choose *OK.*

This closes the dialog box. The screen content is then reloaded. The elements with the categories that you have excluded are not displayed in the tree structure.

## 6.5 Filtering and sorting by responsibility

You want to filter the calendar and budget view specifically according to the planning elements of a responsible person. You want to list the found elements in the tree structure below the name of the responsible person.

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. Click *Add Criterion* in the *Filter criteria (inclusion)* area.
3. From the dropdown list, select the entry *Responsible person*.

This activates the input screen.

4. Choose *Add Criterion*.
5. From the dropdown list, select the name of the responsible person that you want to filter the view according to.
6. Click the *checkmark* within the selection area to confirm your selection.

If required, you can add more responsible persons using the dropdown list.

7. Click the *checkmark* outside the selection area to complete your selection of one or more responsible persons.
8. You can also sort the view in ascending or descending order according to the first name of the responsible person:

- In the *Sorting* area, choose *Add Criterion*.
- From the upper dropdown list, select the entry *Responsible person*. From the lower dropdown list, select whether you want to sort the first names of the responsible persons displayed in ascending or descending order.
- Click the *checkmark* to confirm your entries.

9. Choose *OK*.

This closes the dialog box. The screen content is then reloaded. The individual elements are listed below the name of the responsible person in the tree structure.

## 6.6 Hiding planning elements

You want to hide specific planning elements from the view.

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. In the *Filter criterion (exclusion)* area, click *Add Criterion*.
3. Select the entry *Subtree* or *Tree Level* from the dropdown list.

This activates the input screen.

4. Choose *Add Criterion*.

Another dialog box opens.

5. Select the part of the tree structure or the level whose elements you want to hide from the view.
6. Click the *checkmark* to confirm your selection.

Repeat the previous steps to select additional parts of the tree if required.

7. Click the *checkmark* to confirm your selection of sub-trees to be hidden.
8. Choose *OK* to close the dialog box and to apply the filter criteria.

This closes the dialog box. The screen content is then reloaded. The sub-tree or level that you have excluded from the view is not displayed.

## 6.7 Saving a view

You want to save a view and make it available to other users.

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. Define filter criteria for the view.
3. Choose *Save As.*

Another dialog box opens.

4. Enter a name for the view.

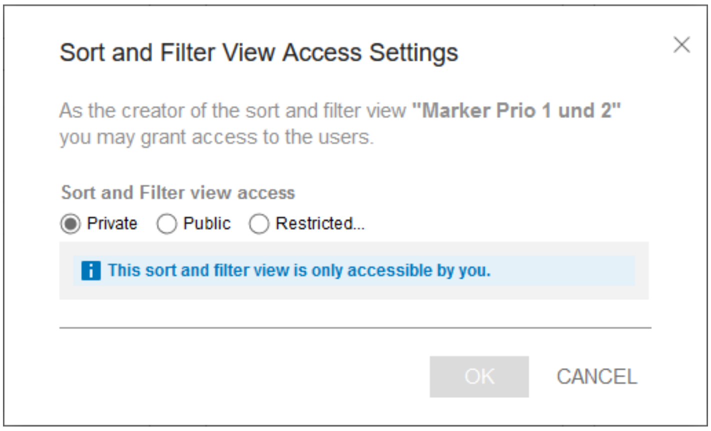
> **Note:** Views with restricted or fully public visibility require a name that is unique throughout the system.

5. Confirm your entry by clicking *OK*.

The view is then created in the *Views* area.

6. Click the pencil icon next to *Access Private*.

The *Sort and Filter View Access Settings* dialog box opens:




7. Select the group of people to whom you want to make the view accessible:

- *Private* (default setting): Only you have access to the saved view.
- *Public*: All Marketing Planner users have access to the view.
- *Restricted*: A screen opens where you can select user groups in the Marketing Planner. Only the selected user groups have access to the view.

8. Choose *OK*.

The *Sort and Filter View Access Settings* dialog box closes.

9. Click *Save*.

The access settings have been saved.

10. Choose *OK*.

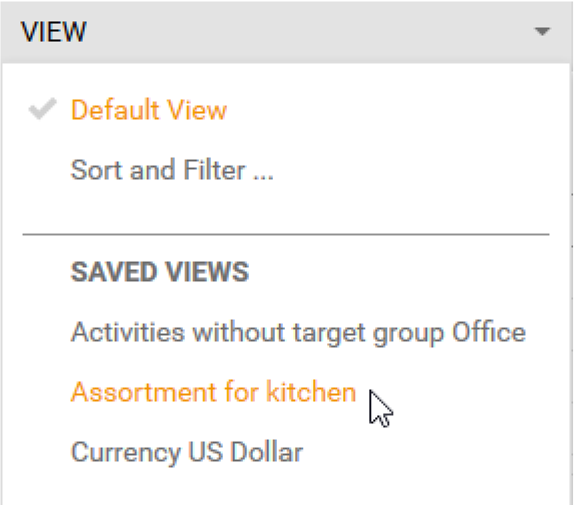
The *View* dialog box closes. The view is saved under the name provided and can be used but not changed by the selected group of people.

## 6.8 Opening a saved view

1. Choose > *View*.

The menu opens.

2. In the second menu section, click the desired view.




The view is applied to the planning elements.

## 6.9 Deleting a view

You want to delete a saved view.

**Prerequisites**

- You created the view that you can delete.
- The view is not in use. Please note that a published view can be used in Smart Access.

**Step by step**

1. Choose > *View* > *Sort and Filter*.

This opens the *View* dialog box.

2. Select the saved view that you want to delete.
3. Choose *Delete*.
4. In the dialog box that opens, choose *Yes* to confirm the deletion of the view.

The saved view is deleted.

# 7 Working with the Marketing Planner

## 7.1 Filling out dimensions

You want to assign a type to a dimension and fill a value for the dimension.

1. Open the detailed view of the element in which you want to fill in a value for a dimension.
2. Go to the *Dimensions* tab.

The dimensions that you can access are listed.

3. Select a dimension.
4. Click *Edit*.
5. Edit the dimension by type:

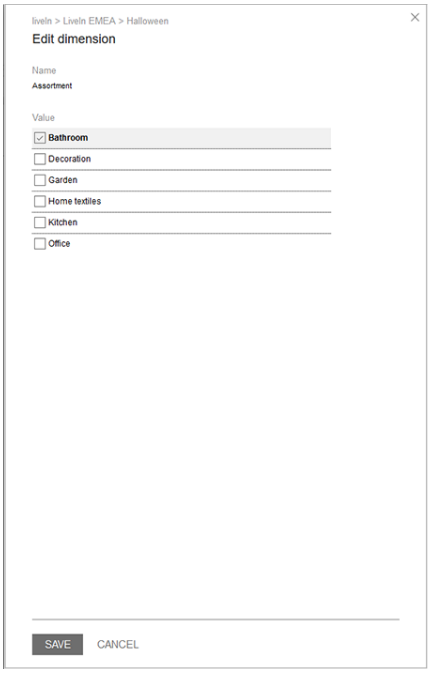
- *Single Selection*: You select one value from the dropdown list.
- *Multi Selection*: In the selection field, you activate one or more checkboxes to select the values that have been defined.
- *Weighted Multi Selection*: In the selection field, you activate one or more checkboxes to select the values that have been defined. Enter a percentage-based weighting for the individual values in the input field. You can enter values with up to two decimal places. The sum of the individual weightings must always add up to 100%.
- *Free Value*: You enter your rating in the free text field.
- *Structured Text Dimension*: You enter a value in the text field. Your entries must correspond to a defined format (for e-mail addresses, for example).
- *Continuous Text*: You enter your rating in the multi-line input area.

6. Choose *Save* to confirm your selection.
7. Choose *X* to close the detailed view.

You have filled the values for the selected dimension.

> **Note:** A dimension that is flagged with a *chain* symbol has inherited its value from a parent element. When providing a value for a dimension for which a value was already provided

manually in the editing dialog box, click the *chain symbol* to adopt an existing inheritable dimension value from the parent element automatically.




## 7.2 Changing the status of a simple task

You have started to process a task assigned to you or have completed a task. You now want to change the status of the task and mark the task as complete.

1. Click Calendar.
2. Open the context menu of the task whose status you want to change and choose *Details*.

   The detailed view of the element opens and the *Edit Task* dialog box is displayed.
3. Select the entry *Done* from the *Change Status* dropdown list.
4. Choose *Save* to confirm your entry.
5. Choose *X*.

The details view closes. The task is marked as complete. When you change the status of the task, the person responsible is informed about the status change via a system message.

## 7.3 Editing a job

In addition to simple tasks, you can create a job and open the job data sheet for editing directly from the Marketing Planner.

**Prerequisites**

You can access the Job Manager module.

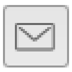
**Step by step**

1. Open the detailed view of the planning element.
2. Go to the *Tasks* tab.
3. Select the job that you want to edit.
4. Click *Edit*.

This activates the input screen.

5. Click *Edit details* to open the job data sheet.

You can use the following functions on the data sheet:

| | |
|---|---|
| Menu ▾ | Click the *Menu* button to:<br>• display the job workflow,<br>• create a job copy,<br>• call the history of the job. |
| Close | You close the job data sheet and return to the detailed view. |
| Save | This saves your entries. |
| Forward job | This forwards the job to the next workflow step. |
| Pass back | This passes the job back to the previous workflow step. |
|  | You can invite additional users as participants for the job. |
|  | This sends messages to the participants in a job. |
| Next data sheet | You can go to the next data sheet. |
| Previous data sheet | You can go back to the previous data sheet. |

**Note:** A job that has been deleted in the Marketing Planner is stored in the Job Manager under the filter > *All Canceled Jobs*.

## 7.4 Entering an invoice

You have defined the following planned budget for your marketing plan:

The total yearly budget for your marketing plan is `250.000 Euro`. Of this, you budget `40.000 Euro` for `Unternehmenskommunikation` and `75.000 Euro` for `Produkt-Kampagnen`. In the Corporate Communication area, the budget is distributed between the months `Januar` (`(20.000 Euro`), `Februar` (`10.000 Euro`), and `März` (`5.000 Euro`). You have received invoices for promotions that have been carried out amounting to 7.500 and 3.000 euro. You now want to update your budget plan and enter the invoices.

> **Note:** To ensure that you can use functions such as the function for displaying the remaining budget in the budget view, invoices can only be linked with orders from the same year. It is not possible to link invoices with orders from different years.

**Step by step**

1. Open the detailed view of the element to which you wish to add an invoice.
2. Go to the *Invoices* tab.
3. Choose *Add*.

The *Add Invoice* dialog box opens.

4. Enter the required information. Refer to the following table.

> **Note:** To transfer the invoice amounts to the *Actual* column, you only require the Date and Amount. The other entries are optional.

5. Click *Save*.
6. Choose *Add* to add an additional invoice.
7. Repeat steps 4 and 5.
8. Choose *X* to close the detailed view.

The two amounts are added together and the result (`10.500 Euro`) is entered automatically in gray font in the corresponding cells in the *Actual* column in both the yearly budget and the month of the invoice.

> **Note**
>
> If you want to request a market development fund for an invoice directly, click *Save invoice and request MDF* in step 5 . The *Request MDF* dialog box now opens. For more information, see the chapter Requesting market development funds on page 188. Once you have requested the MDF, you go back to the *Invoices* tab and can continue with step 6.

### Editable properties of an invoice

| Property | Description |
|---|---|
| *Name of the invoice* | Enter a name for the invoice. If you do not enter a name, the invoice is displayed based on the following pattern in other lists (for example, for a request for a marketing development fund): [invoice date][invoice amount]. |
| *Amount* | Enter an amount for the invoice (maximum: 99,999,999,999.99). |
| *Booking Date* | Enter the booking date. |
| *Publish Date* | Enter the invoice date. |
| *Payment status* | Activate the checkbox if the invoice is paid. |
| *Job number* | Enter the job number. |
| *Reference number* | Enter the reference number. |
| *Invoice number* | Enter the invoice number. |
| *Department* | Enter the cost center. |
| *Cost type* | Enter the cost type by which the invoice is categorized. You can enter free text or choose a previously made entry. |
| *Supplier* | Enter the supplier. |
| *Responsible person* | Enter the responsible person. |
| *Comment* | Enter a comment. |
| *Linked PO* | Link the invoice to a PO. This allows you to compare a PO with its corresponding invoice easily. |
| *Attachments* | Add a file attachment (a PDF file or link, for example). The date on which you created the attachment is added automatically.<br>Users with access to the *Attachments* tab can download the files by clicking them in the *Attachments* column. |

## 7.5 Market development fund (MDF)

To receive a fund for financing your marketing measures, use the *MDF* (Marketing Development Fund) function. You can request marketing development funds for your added invoice and assign them to a user with the appropriate authorization (see Requesting a marketing development fund on page 189). This user processes the request (see Processing a request for marketing development funds on page 189). The approved funds are displayed in the *MDF* budget column (see Schematic yearly and monthly view on page 26). MDF amounts can be appoved up to a maximum of 99,999,999,999.99 (of the corresponding currency).

### 7.5.1 Requesting a market development fund

**Step by step**

1. Open the details view of the element for whose assigned invoices you want to request a marketing development fund.
2. Go to the *MDF* tab.
3. Choose *Add*.

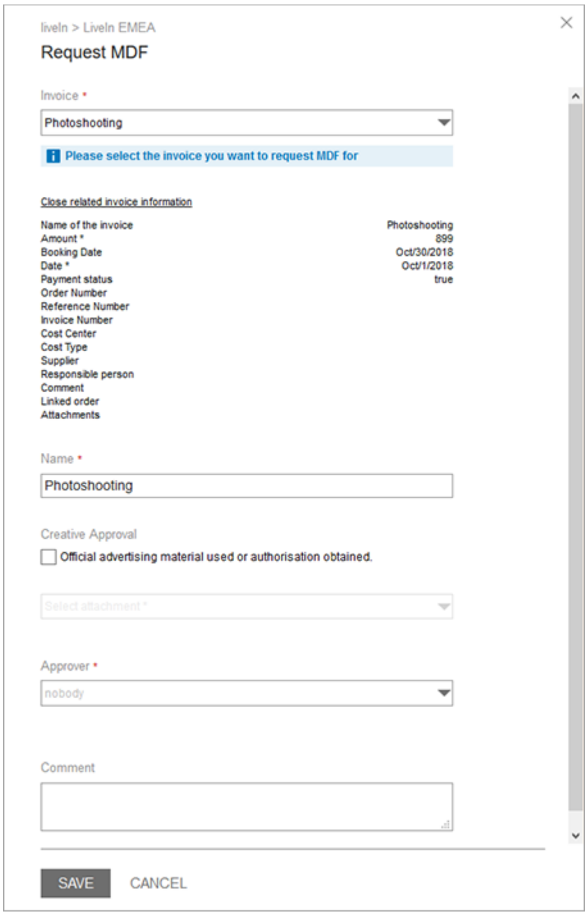
The *Request MDF* dialog box opens.

4. Edit the following points:

- *Invoice*: Select the invoice for which you want to request the marketing development fund. As soon as you have selected the invoice, all the information about the invoice is displayed under the dropdown list.
- *Name*: The name of the invoice is entered automatically. You can change the name.
- *Creative Approval*: Activate this checkbox if you are using official advertising material or have obtained an approval. You can confirm this by selecting an attachment from the dropdown list.
- *Approvers*: Assign the request to the user who is to process the request. The dropdown list displays only those users that are entered as approvers and that have access rights to the element.
- *Save as favorite*: If you frequently request a market development fund from the selected approver, activate the checkbox. The next time that you make a request, the user is set by default in the *Approver* field. You can change this default setting and choose a different approver at any time.
- *Comment*: Enter comments if required.

5. Choose *Save*.

You have requested the marketing development fund. The request is displayed on the MDF tab in the details view with the status *Pending*. The approver is notified of the request by e-mail. As the user who made the request, you also receive a summary via e-mail.



### 7.5.2 Processing a request for a market development fund

**Prerequisites**

You have been entered as an approver (see *Entering a user as an approver* on page 42).

**Step by step**

1. In the upper navigation pane, choose > *Approvals*.

The *Approvals* view opens on the *MDF Requests* tab.

2. Select a request:

- Select a request in the list.
- Use the search function to search for a request from the list.

3. Decide whether to approve or reject the request. Activate the relevant checkbox.
4. If you approve the request, enter the marketing development fund rate:

- In the *MDF (%)* column, enter a percentage value (for example, `5`). In this case, 5% of the invoice is calculated as the fund.
- In the *MDF* column, enter an absolute value (for example, `100` [€]).

5. If you want to comment on your processing, set the cursor above the *Comment* field. Choose *Reply*.

A comment field opens, in which you can enter your response. Choose *Close* to transfer your entries.

6. Choose *Save* to confirm your changes.

You have processed the request for a market development fund. The requestor is informed that the request is processed by e-mail. Processed market development funds are listed under > *Approvals* > *Completed MDF requests*.

If you choose *Details* in the list of the MDF requests in the *Action* column, you go directly to the input screen of the request.

If several attachments are attached to the request, you can download all attachments in one ZIP file by clicking on the *Download all files* button.

**Modifying a table**

If you want to adapt the table of requests for market development funds to your requirements, you have the following options. The settings are saved for each user and can be adjusted again at any time.

- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the columns: To change the order of the columns, move the column in the header area using drag and drop. A tooltip appears that shows you whether the order of the current cursor position is changed.
- Column width: Change the column width in the same way as in spreadsheet programs.
- Sorting the displayed objects: To change the sorting, move the cursor to the header line of the table in the column to be used for the sorting. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Sort ascending* and *Sort descending*.

## 7.6 Measuring targets achieved using KPIs

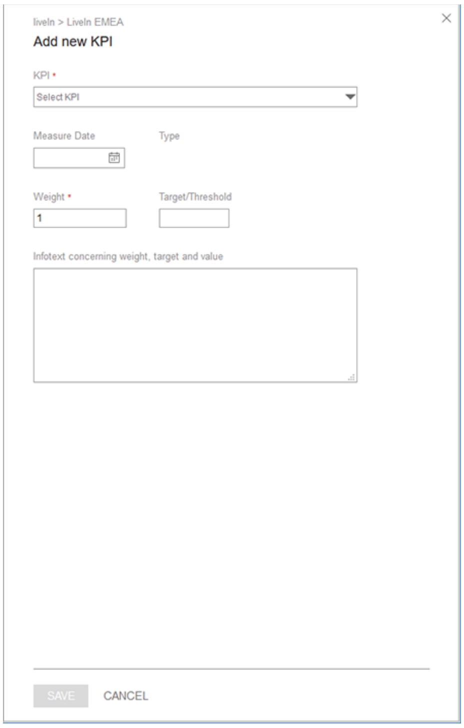
You can assign KPIs or a KPI set to an element to rate the extent to which targets have been achieved or the success of the measures. The lead conversion rate shows what percentage of the total visitors to a website have carried out a specific action (for example, made a purchase or an inquiry). You can depict the results of the KPIs that you use in charts using the Marketing Planner reporting functions.

### 7.6.1 Adding a KPI

You want to assign a KPI to a planning element.

1. Open the detailed view of the element to which you wish to add a KPI.
2. Go to the *KPIs* tab.
3. If you use KPIs that are based on budget values: In the *Calculation base* dropdown list, set whether the calculation is to be based on the reference currency or the working currency.
4. If the calculation of the KPIs is to be based on the reference currency: In the *Fiscal Year* dropdown list, enter the year whose exchange rate is to be used for the calculation.
5. Choose *Add*.

The following dialog box opens:




6. Select an existing KPI from the *KPIs** dropdown list.

The KPI type is displayed below the dropdown list.

7. Enter the required information in the input fields:

- *Date*: Specify the date by which the KPI must be fulfilled and evaluated. Pending evaluations are displayed in the *KPI Evaluation* dashlet.
- *Weight**: Define the weighting of the selected KPI in relation to the other KPIs used for the element.
- *Target/Threshold*: Define the target value for the KPI (for example, the planned number of visitors).
- *Value* (only visible if the value is a measured value): The measured value.
- *Infotext concerning weight, target and value*: Enter the additional information.

8. Click *Save*.
9. Choose *X*.

The detailed view closes. You have added a KPI to the planning element, and the KPI is displayed on the KPI tab in the detailed view of the planning element. If the KPI valuation is overdue, this is indicated in the second column of the list with the symbol . If an entry is not required, the symbol  is displayed in the column.

### 7.6.2 Adding a KPI set

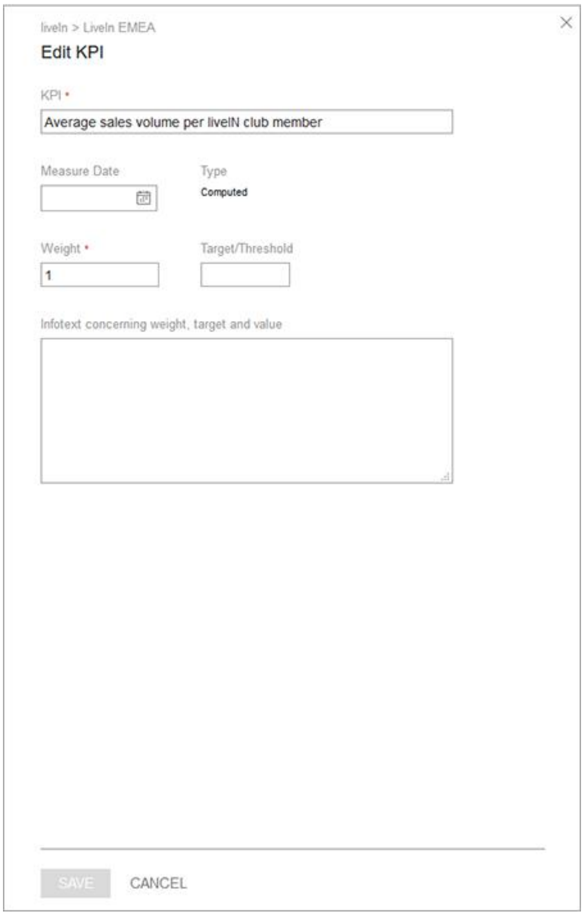
You can use a KPI set to group together multiple KPIs so that all the KPIs required to evaluate a marketing measure can be assigned to a planning element simultaneously.

1. Open the detailed view of the element to which you want to add a KPI set.
2. Go to the *KPIs tab.*
3. If you use KPIs that are based on budget values: In the *Calculation base* dropdown list, set whether the calculation is to be based on the reference currency or the working currency.
4. If the calculation of the KPIs is to be based on the reference currency: In the *Fiscal Year* dropdown list, enter the year whose exchange rate is to be used for the calculation.
5. Click the *gear* icon then choose > *KPI set* and select the set that you want to add from the displayed list

The KPIs that have been grouped together in the selected KPI set are added to the element.

6. In the first column, select one of the added KPIs.
7. Choose *Edit*.

The *Edit KPI* dialog box opens.




8. Enter the required information in the input fields:

- *Date*: Specify the date by which the KPI must be fulfilled and evaluated. Pending evaluations are displayed in the *KPI Evaluation* dashlet.

- *Weight**: Define the weighting of the selected KPI in relation to the other KPIs used for the element.
- *Target/Threshold*: Define the target value for the KPI (for example, the planned number of visitors).
- *Value* (only visible if the value is a measured value): The measured value.
- *Infotext concerning weight, target and value*: Enter the additional information.

9. Click *Save*.
10. Repeat steps 6 to 9 until all of the added KPIs are edited.
11. Choose *X*.

The details view closes. You have assigned a KPI set to the selected planning element.

## 7.7 Assigning resources from digital campaigns

You can use the *Digital Marketing Center* (DMC) module to plan digital campaigns and play them out in the relevant channels. The DMC provides interfaces for leading tools and platforms such as Google Ads or Facebook Business Manager.

To enable the use of the Marketing Planner as your central tool, you can assign resources from the Digital Marketing Center to the planning elements. This assignment allows data such as KPIs to be exchanged directly between the modules and displayed for the correct element. You choose which data is to be exchanged in the Digital Marketing Center. If you have any questions, please contact your system administrator.

**Assigning external resources**

1. In the calendar or budget, open the context menu for the element to which you want to assign an external resource.
2. Choose *Assign external resources*.

The *Assign external resources* dialog box opens.

3. Search for the resource:

- Click through the tree structure until you find the desired resource.
- Enter a keyword in the search field. Press the Enter key or click the search icon. Instead of the full tree structure, the matching resources are displayed.

4. Select an external resource by activating the checkbox next to the name of the resource.
5. Click *Close*.

You have assigned an external resource from the Digital Marketing Center to the element.

## 7.8 Downloading attachments

You can download the attachments of an element to check invoices, for example. You have a number of options:

- You can download the attachments from the list of all of the element's attachments. For more information, please refer to the *Attachments tab* section.
- You can download attachments which have already been linked to an order or an invoice. For more information, please refer to the *Orders tab* and *Invoices tab* sections on page 196.

> **Note**
>
> Please note that attachments can also be linked. These links cannot be downloaded.

### 7.8.1 Attachments tab

You can download files which were added under the *Attachments* tab. You can download multiple files at the same time.

**Prerequisites**

The *Download* column must be displayed on the *Attachments* tab in the table. If the column is not displayed and you would like to change the table so that it is displayed, please refer to Detailed view on page 144.

**Downloading a file**

1. Open the detailed view of the element where you would like to download an attachment.
2. Go to the *Attachments* tab.
3. Click *Download* in the *Download* column next to the relevant file.

This will download the file in its original format. Follow any instructions which may be displayed by your operating system.

**Downloading multiple files**

1. Open the detailed view of the element where you would like to download attachments.
2. Go to the *Attachments* tab.
3. Check the box in the first column next to the files which you would like to download.
4. Click *Download files* above the table.

The files will be downloaded as a ZIP file. Follow any instructions which may be displayed by your operating system.

### 7.8.2 Orders tab and Invoices tab

Orders and invoices can be linked directly to attachments; this can be helpful if you want to open the PDF connected with an invoice, for example. You can download the files linked to an order or an invoice.

**Prerequisites**

The *Attachments* column must be displayed in the table on the tabs. If the column is not displayed and you would like to change the table so that it is displayed, please refer to Detailed view on page 144.

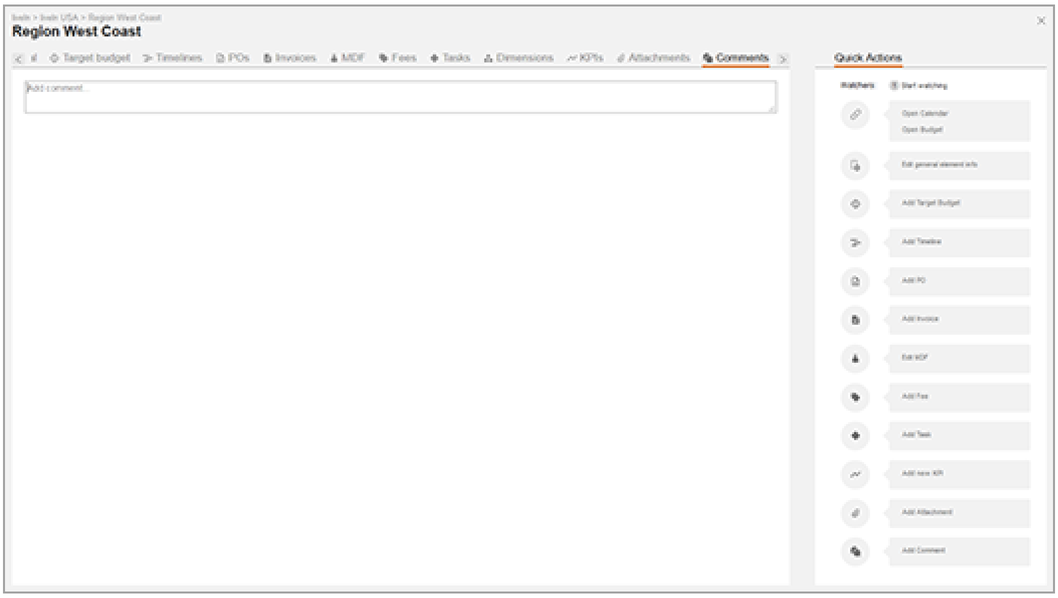
**Downloading attachments from the Orders and Invoices tabs**

1. Open the detailed view of the element where you would like to download files.
2. Go to the *Orders* or *Invoices* tab.
3. Click *Download files* in the *Attachments* column for the order or invoice where you would like to download attachments.

All of the files for this order or this invoice will be downloaded as a ZIP file. Follow any instructions which may be displayed by your operating system.

## 7.9 Leaving comments for planning elements

If you would like to provide information for other users, you can use the comment field under the *Comment* tab in the detailed view.

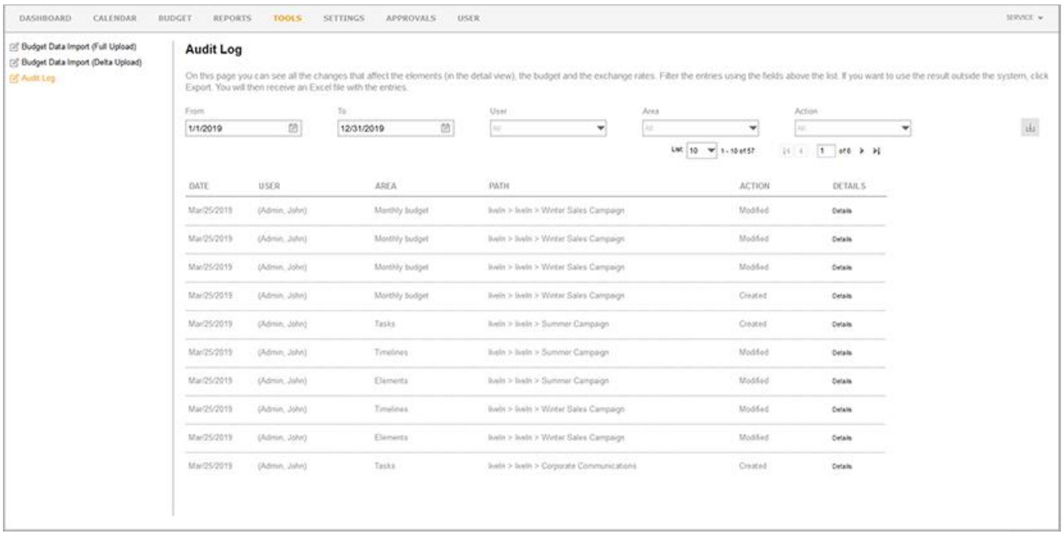



Enter your information in the comment field. Then click *Save* to save your comment.
The comment field has a username function: If you type the @ symbol followed by a name, this opens a list of corresponding user names in the system. You can then click the relevant user. This user is sent an e-mail notifying them of the comment. Please note that all users are listed in the Marketing Planner, regardless of their access permissions.

You can add as many comments as you like. You can also edit and delete your comments later.

## 7.10 Tracking changes

The Marketing Planner module logs all changes related to the elements (in the detailed view), the budget, and the exchange rates. These changes can be accessed, evaluated in detail and exported under *Tools > Change log*. You can use a filter function to search for specific changes.
Please note that this page may only be accessed by users with a specific right. The change log shows users with this right all the changes regardless of which elements they are authorized to access. BrandMaker therefore recommends restricting this right to administrators.




You can filter the changes using the fields in the upper area. The following criteria are available:

- *From.. To*: the period in which the change was made.
- *User*: the user that made the change.
- *Area*: the object that was changed, e.g. attachment, dimension value or monthly budget.
- *Action*: the nature of the change: created, amended or deleted.

Details about the change can be displayed by clicking *Details* in the table. Changed values are highlighted in color. If you click the button in the detailed change log, the displayed data is exported. The changed values are also marked in color here.

You can also export several entries of the audit log. If required, filter the entries under > *Marketing Planner > Tools > Audit Log* and then click the button . An Excel file with the displayed entries is displayed.

## 7.11 Exporting the marketing plan for a year

You want to send an e-mail containing a PDF and XLSX file of the marketing plan (tree structure and timelines) for a year to other users quickly and easily. You also require a version of the plan in a PDF and XLSX file in order to make it available to external partners. You want to highlight planning elements that were created or changed within a specific time span.

1. Under > *Calendar* or > *Budget*, select the year whose marketing plan you want to export.

> **Note:** You can export the marketing plan from both the budget and the calendar view. The marketing plan can only be exported as an Excel file from the budget view.

2. Optional: If you do not want to export the whole view of the planning elements, filter the view to reduce it to the necessary elements.
3. Click the icon in the top view.

This opens the *Exports* dialog box.

4. From the dropdown list in the *Output format* area, choose:

- *PDF Export* if you want to export the marketing plan as a PDF file (only available under > *Calendar*).
- *Excel Export* if you want to export the marketing plan as an XLSX file.

5. From the top picklist in the *Settings* area, choose:

- *Export all elements of the view* if you want to export all elements, including currently invisible sub-elements.
- *Export visible elements of the view* if you want to export the elements that are currently visible in the calendar. Invisible sub-elements are not taken into account.

6. Activate the *Highlight changes to timelines, tasks and markers* checkbox to highlight the planning elements that were changed accordingly within a specific time span in the exported file.

This expands the input screen.

7. Select the time span within which the changes were made. Specify whether newly created and/or changed planning elements are highlighted.
8. If you want to include the markers of the planning elements in the export, select the *Include markers* checkbox.
9. From the bottom picklist in the *Settings* area, choose:

- *Download export* if you want to save the export in the selected file format (PDF or XLSX file).
- *Send Export via E-Mail* if you want to send the export in the selected file format (PDF or XLSX file) directly to another user by e-mail.

10. You can use the *Search for recipients* search field to select the e-mail recipient. The search takes all the BrandMaker users into account.

The overview table displays all the users that have been selected as recipients. You can delete users from the recipient list. The *Access* column shows whether the user is authorized to use the Marketing Planner.

11. *Optional:* You can enter text for the *message*, if required. You can also send the e-mail without any message text.
12. Choose *Generate export*.

The export is generated. Depending on your selection, you can save the generated file or the export is sent to the selected recipients automatically. The export contains the displayed planning elements and specifies the filter applied.

> **Note:** Once the export file has been generated successfully, a message at the bottom of the dialog box informs you that you can close the window.

# 8 Reports and graphics

You want to be able to rate and evaluate the success of your marketing measures at all times. You also require regular graphics showing, for example, the budget allocation, planned and actual comparison, activity overview, and KPI evaluations. You can use the integrated reporting functions in the Marketing Planner to create various reports using up-to-date data and to stage them graphically at the click of a button.

## 8.1 Project budgets report type

You require a pie chart to display the distribution of the budget for a project between its related measures or areas. You want to generate the evaluation based on both the planned and the actual values. You also require a yearly, monthly, and quarterly overview for the evaluation.

1. Select the *Project budgets* report type.
2. Select the year of the marketing plan from the dropdown list.

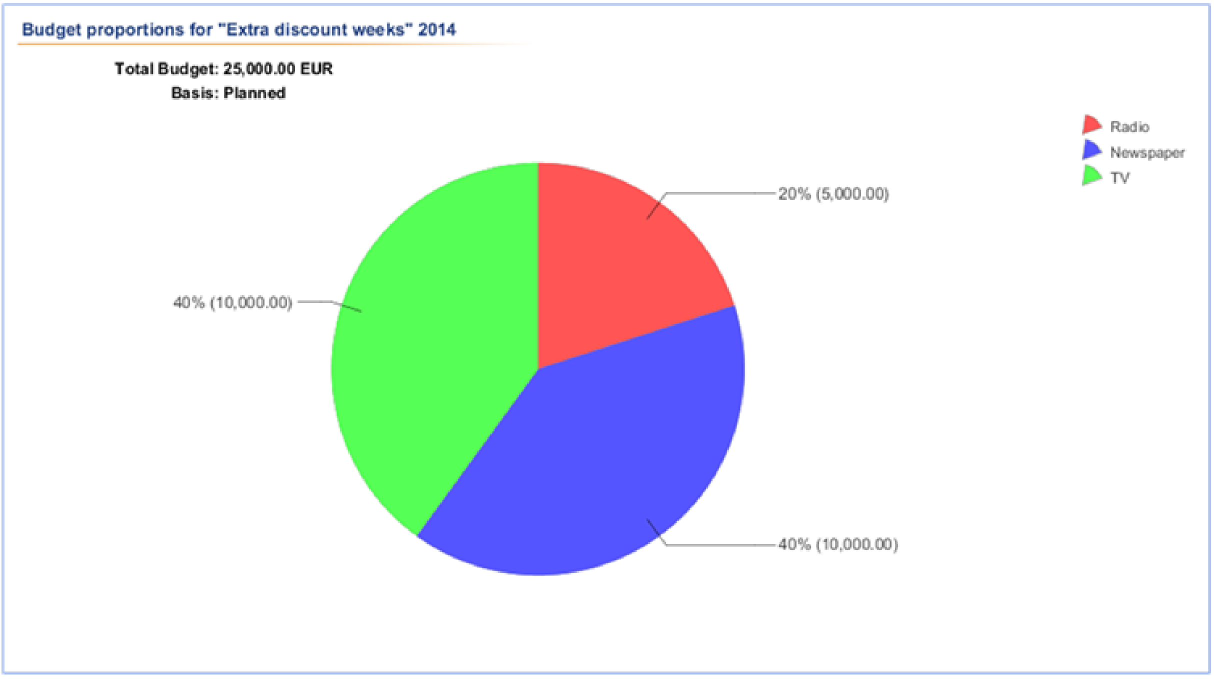
The tree structure created for the selected year is displayed in the *Project* area.

3. From the *Time Filter* dropdown list, select one of the following entries:

- *Year*: This generates the report on the basis of the yearly budget.
- *Quarters*: Activate the checkboxes of the quarters whose budget values you want to take into account for the report.
- *Months*: Activate the checkboxes of the months whose budget values you want to take into account for the report.

4. In the *Basis* area, specify whether the report is to be based on the Actual or Planned values.
5. From the *Currency* dropdown list, choose whether you want to select an element for a specific working currency or whether the element is displayed in the reference currency.
6. In the *Project* area, select the element of the tree structure for which you want to create the report. Click the arrow icon in the Project area to go one level up from the level that is currently selected.
7. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a graphics file.




## 8.2 Budget planned/actual report type

You require a bar chart to compare the actual and planned values of the selected planning element in your marketing plan. You want to generate the report based on the yearly, quarterly, and also the monthly budget values.

1. Select the *Budget Planned/Actual Comparison* report type.
2. Select the year of the marketing plan from the dropdown list.

The tree structure created for the selected year is displayed in the *Project* area.

3. From the *Time Filter* dropdown list, select one of the following entries:

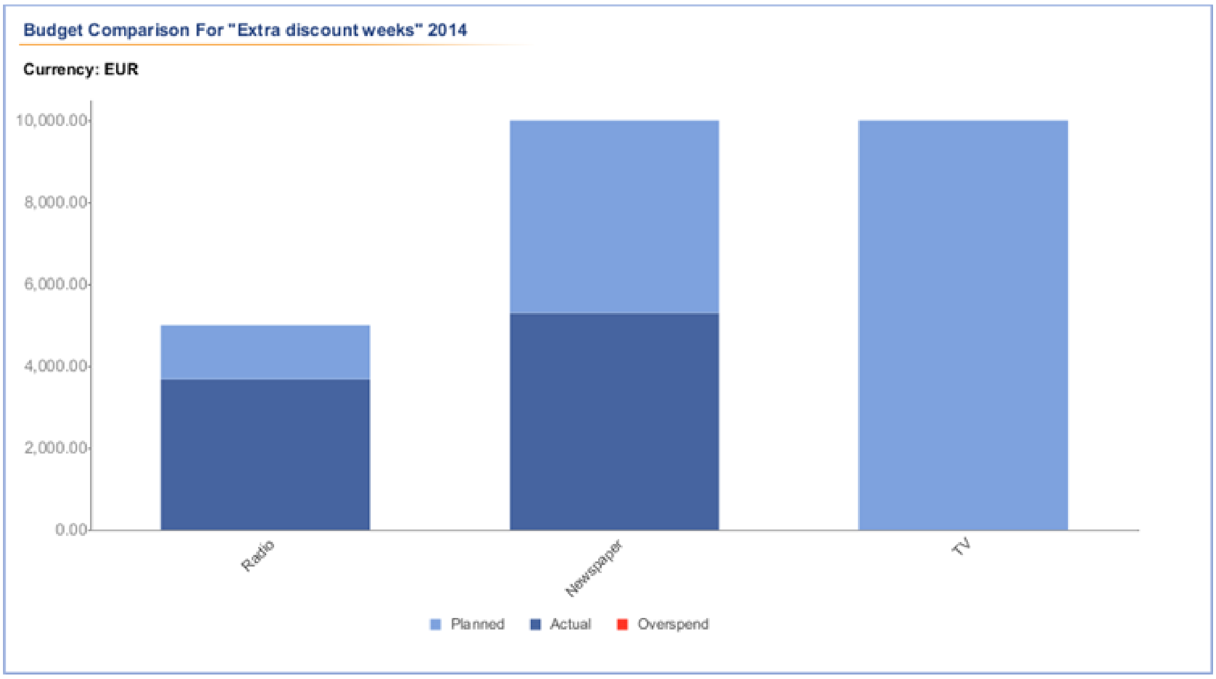
- *Year*: This generates the report on the basis of the yearly budget.
- *Quarters*: Activate the checkboxes of the quarters whose budget values you want to take into account for the report.
- *Months*: Activate the checkboxes of the months whose budget values you want to take into account for the report.

4. Select one of the following entries from the *Percentages* dropdown list:

- *None*: Percentages based on the ratio of the planned budget in relation to the actual budget are not displayed above the individual bars.
- *Deviation*: A negative percentage above the individual bars indicates how much of the planned budget is still available. Budget overruns are displayed using a positive percentage.
- *Target achievement*: A positive percentage above the individual bars indicates how much of the budget has actually been issued. Budget overruns are displayed using a percentage of more than 100.

5. In the *First basis* and *Second basis* fields, select the budget columns that you want to compare with each other.
6. In the *Project* area, select the element of the tree structure for which you want to create the report. Click the arrow icon in the *Project* area to go one level up from the level that is currently selected.
7. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a graphics file.



## 8.3 Measure Overview report type

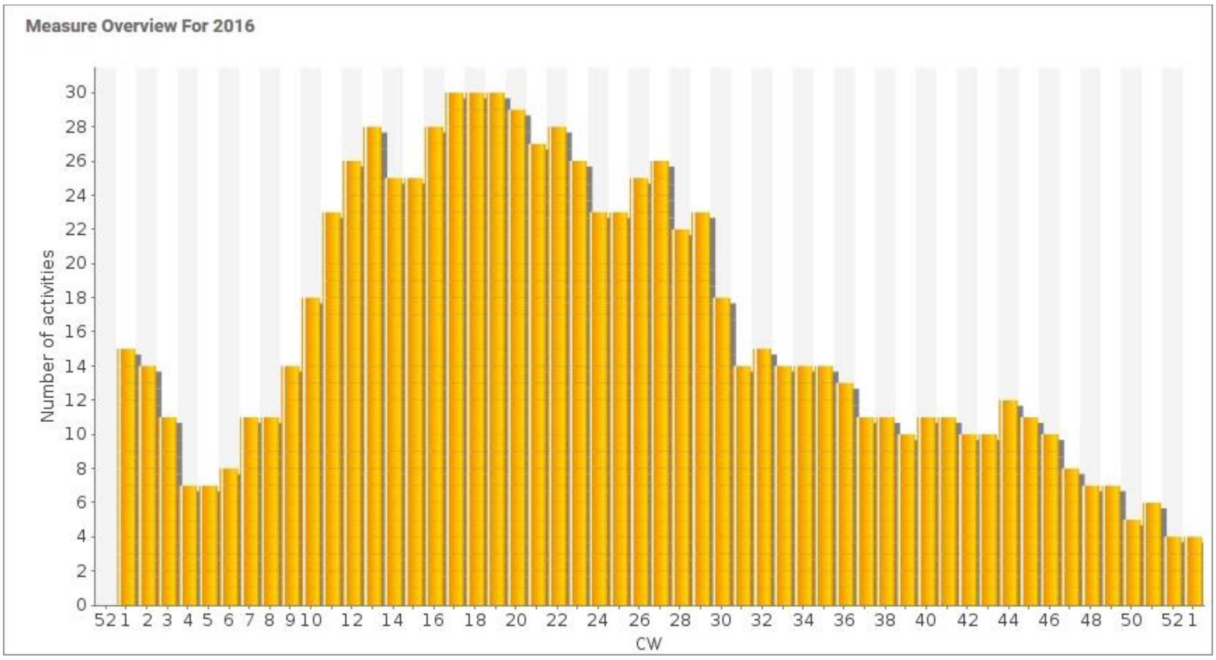
You need a bar chart that displays the number of measures allocated in calendar weeks. You also want to generate the bar chart based on the company divisions and the existing categories.

1. Choose the *Measure Overview* report type
2. Select the *year* of the marketing plan from the dropdown list.
3. In the *Grouping* area, define how the measures are to be differentiated for the bar chart:

- *Business Unit*: This breaks down the measures according to business unit. The entry under *> Settings > Calendar Structure > Level 2* is the entry taken into account for the report.
- *By category*: This breaks down the measures according to the entries stored under *> Settings > Categories*.
- *None*: This displays the amount of measures broken down into calendar weeks without any differentiations.

4. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a graphics file.



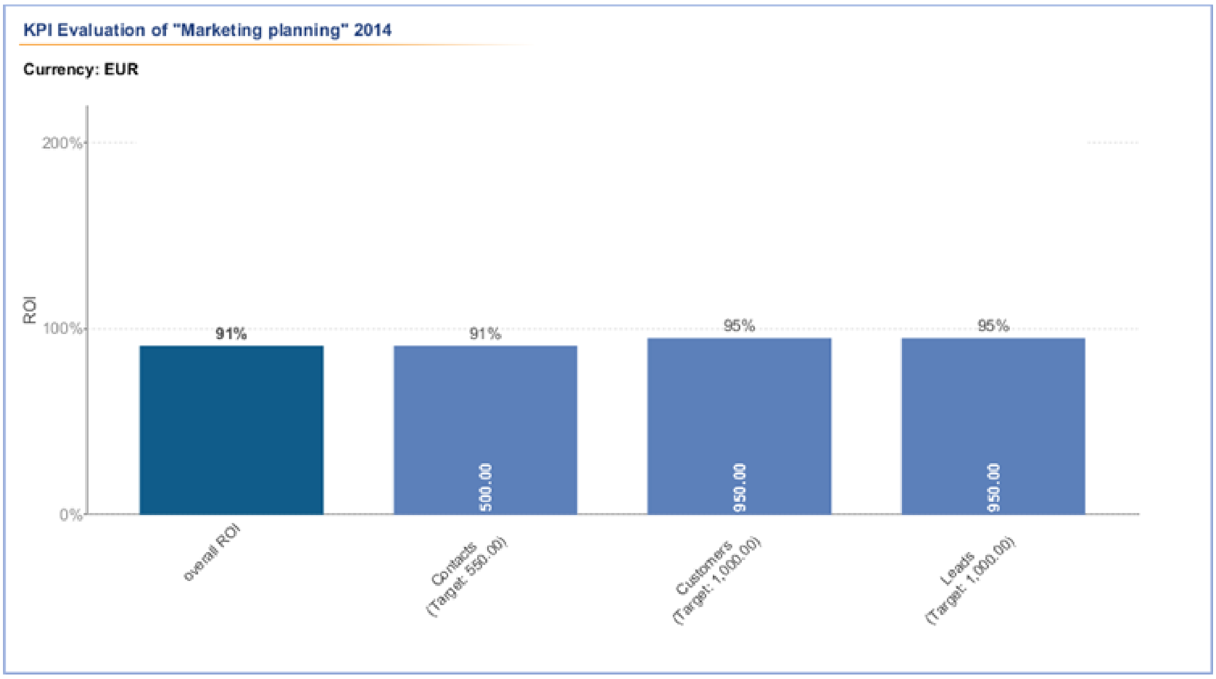
## 8.4 KPI evaluation report type

You want to compare the target values of the KPIs of the selected planning elements together with the values that have actually been achieved in a bar chart. The values that have actually been achieved are written into the bars. The extent to which the targets have been achieved based on the return of investment (ROI) is displayed as a percentage above the individual bars.

1. Select the *KPI Evaluation* report type.
2. Select the year of the marketing plan from the dropdown list.
3. From the *Currency* dropdown list, choose whether you want to select an element for a specific working currency or whether the element is displayed in the reference currency.
4. In the *Project* area, select the element of the tree structure for which you want to create the report. Click the arrow icon in the *Project* area to go one level up from the level that is currently selected.
5. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a graphics file.

**Note:** If a KPI value on the Y axis (ROI) is larger than 200%, then the bar is truncated. The percentage value is displayed above the bar.



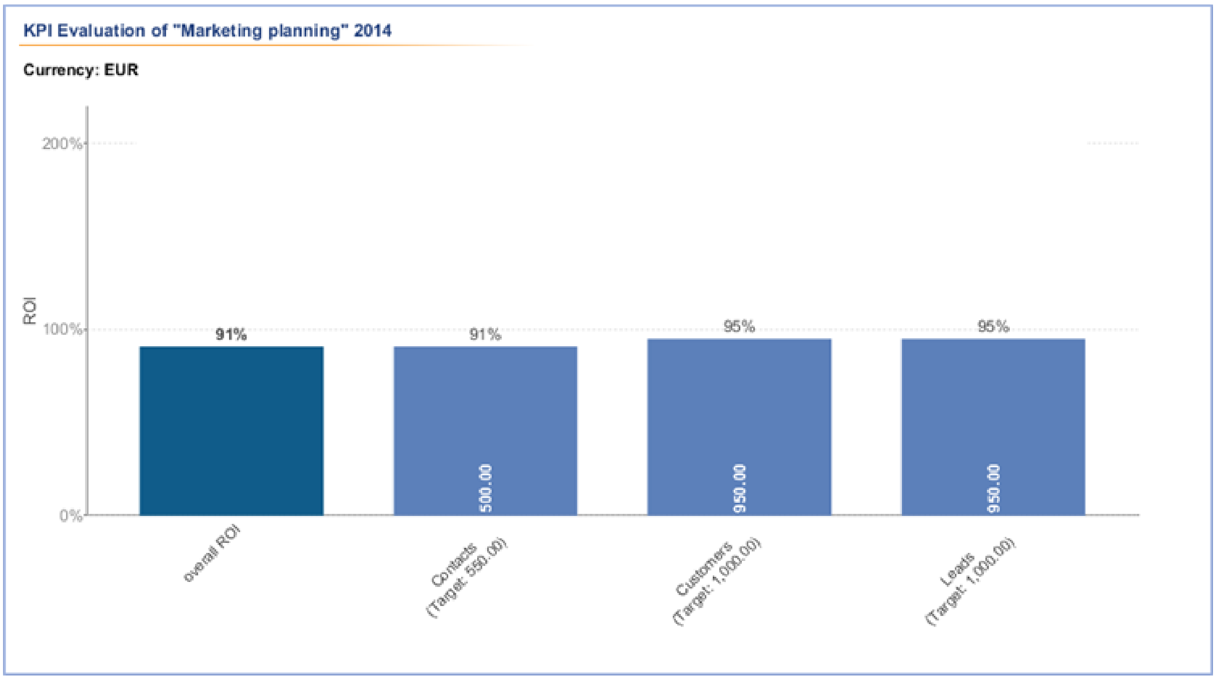
## 8.5 KPI comparison report type

You want to compare the success of multiple KPIs or compare a KPI for multiple marketing measures. You want to display the result in a bar chart. The values that have actually been achieved are written into the bars. The extent to which the targets have been achieved based on the return of investment (ROI) is displayed as a percentage above the individual bars. The selected KPIs are displayed in different colors.

1. Select the *KPI Comparison* report type.
2. Select the year of the marketing plan from the dropdown list.
3. From the *Currency* dropdown list, choose whether you want to select an element for a specific working currency or whether the element is displayed in the reference currency.
4. Click *Add new KPI* in the *KPI Filters* area.
5. Select a KPI from the dropdown list.
6. Click the *checkmark* to confirm your selection.
7. Click *Add new KPI* to select an additional KPI.
8. Once you have selected and added all the KPIs for the comparison, click *Add new node* in the *Project* area.
9. Select the element of the tree structure for which you want to generate the report. Click the arrow icon in the *Project* area to go one level up from the level that is currently selected.
10. Click the checkmark to confirm your selection.
11. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a graphics file.

**Note:** If a KPI value on the Y axis (ROI) is larger than 200%, then the bar is truncated. The percentage value is displayed above the bar.




## 8.6 KPI benchmarks report type

You require a bar chart that displays the minimum, maximum, and mean KPI values of the selected element of your marketing plan. You also want to generate the report based both on the values of the selected dimensions and on the sub-elements of the selected element.

1. Select the *KPI Benchmarking* report type.
2. In the *Report type* area, define the information on which the report is to be based:

- *Dimensions*: Select a dimension from the dropdown list to display the respective values for the selected dimension in a bar chart.
- *Tree*: Select *Tree* to display the sub-elements of the element selected in the Project area in a bar chart.

3. Select the *year* of the marketing plan from the dropdown list.
4. In the *Scaling* area, define how the values of the selected KPIs are to be displayed:

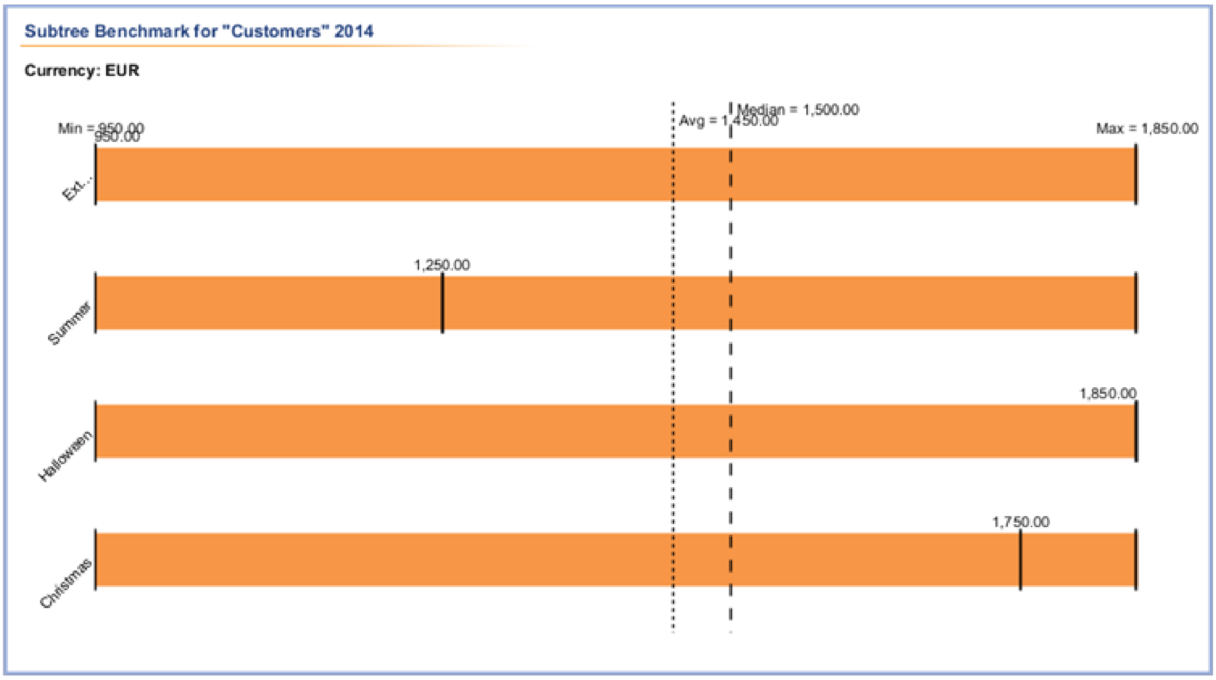
- *Global minimum/maximum*: The chart displays all the calculated values, even those that deviate greatly from the average.
- *Automatic Zoom*: The chart does not display values that deviate the most from the minimum or maximum value.

5. Click *Add new KPI* in the *KPI Filters* area.
6. Select a KPI from the dropdown list.
7. Click the *checkmark* to confirm your selection.
8. Click *Add new kpi* to select an additional KPI.

9. After you have selected and added all the KPIs for the comparison, select the element of the tree structure for which you want to generate the report in the *Project* area. Click the arrow icon in the Project area to go one level up from the level that is currently selected.
10. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the generated diagram locally as a PDF.

**Note:** The bar chart displays the median value of the evaluated KPI values. The median value is the central value in a data series and divides the bar length between the minimum and maximum KPI values. The median value displays the middle value in a range of individual values arranged according to size and is a useful average value even in the case of greatly deviating values. The arithmetical average of all the KPI values is indicated by AVG (average) in the bar chart.

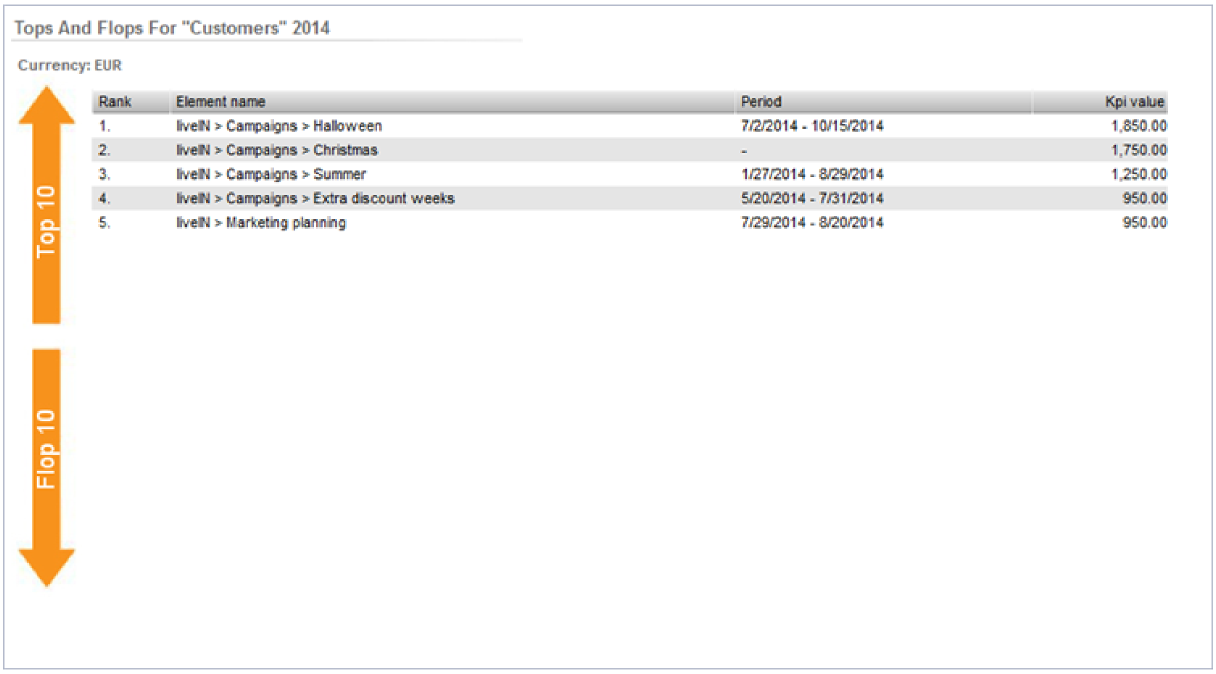


## 8.7 Tops and Flops report type

You require a "hit list" of the elements for which the selected KPIs have performed best or worst.

1. Select the *Tops and Flops* report type.
2. Select the *year* of the marketing plan from the dropdown list.
3. In the *Currency* dropdown list, choose which elements to include in the report. Only elements with the selected currency are listed.
4. Click *Add new KPI* in the *KPI* area.
5. Select a KPI from the dropdown list.
6. Click the *checkmark* to confirm your selection.
7. Click *Add new kpi* to select an additional KPI.
8. After you have selected and added all the KPIs for the comparison, click *Generate Diagram*.

The report has been created. A graphic is created for each of the selected KPIs. Click *Exports* to save the generated diagrams locally as a PDF file.




| Rank | Element name | Period | Kpi value |
|---|---|---|---|
| 1. | liveIN > Campaigns > Halloween | 7/2/2014 - 10/15/2014 | 1,850.00 |
| 2. | liveIN > Campaigns > Christmas | - | 1,750.00 |
| 3. | liveIN > Campaigns > Summer | 1/27/2014 - 8/29/2014 | 1,250.00 |
| 4. | liveIN > Campaigns > Extra discount weeks | 5/20/2014 - 7/31/2014 | 950.00 |
| 5. | liveIN > Marketing planning | 7/29/2014 - 8/20/2014 | 950.00 |

## 8.8 Tabular report report type

Choose the *Tabular report* report type to display specific elements of your marketing plan in a clear tabular form. For example, you can generate task lists, an overview of the planned measures grouped according to target group, a budget overview, or a list of the measures distributed to the cost centers (including the amounts).

**Prerequisites**

You have already created a *column set*. In a *column set*, you can specify which information and details are output in the table columns.

**Step by step**

1. Select the *Tabular Report* report type.
2. Select the *year* of the marketing plan from the dropdown list.
3. Select a column set in the *Column Set* dropdown list or choose *Edit column sets* to change an existing column set or create a new one:

   a. Select a set in the *Column sets* area or choose *Add new column set*.

   b. Edit the columns in the *Columns* area. You can use the dark gray arrow keys to change the order of the columns. If you create a report about a dimension of the *Weighed Multi Selection* type, the checkbox *Include 0-rated selections* is displayed. If the checkbox is activated, selections with a value of 0 are listed in the report.

   c. Click *Close*.
4. From the *Currency* dropdown list, choose whether you want to select an element for a specific working currency or whether the element is displayed in the reference currency.
5. In the *Project* area, select the planning element for which you want to generate the report. The tabular report takes only the sub-elements of the selected element into account. Click the arrow icon in the Project area to go one level up from the level that is currently selected.
6. Choose *Generate Diagram*.

The report has been created. Click *Exports* to save the report locally as an Excel file.

Tabular "liveIN" 2014

| Grouped by dimension : 02 Target group | Dimension : 02 Target group | Element name | Element period | Element path |
|---|---|---|---|---|
| Best Ager | | | | |
| | Best Ager,Children,Families | Marketing planning | 7/29/2014 - 8/20/2014 | liveIN > Marketing planning |
| | Best Ager,Families | Corporate communication | 1/15/2014 - 10/26/2014 | liveIN > Marketing planning > Corporate communication |
| | Best Ager,Children,Families | Product campaigns | 2/22/2014 - 11/17/2014 | liveIN > Marketing planning > Product campaigns |
| Children | | | | |
| | Best Ager,Children,Families | Marketing planning | 7/29/2014 - 8/20/2014 | liveIN > Marketing planning |
| | Best Ager,Children,Families | Product campaigns | 2/22/2014 - 11/17/2014 | liveIN > Marketing planning > Product campaigns |
| Families | | | | |
| | Families | Extra discount weeks | 5/20/2014 - 7/31/2014 | liveIN > Campaigns > Extra discount weeks |
| | Families | Radio | 6/2/2014 - 9/30/2014 | liveIN > Campaigns > Extra discount weeks > Radio |
| | Families | Newspaper | 7/11/2014 - 10/1/2014 | liveIN > Campaigns > Extra discount weeks > Newspaper |
| | Families | TV | 6/2/2014 - 10/1/2014 | liveIN > Campaigns > Extra discount weeks > TV |
| | Families | Summer | 1/27/2014 - 8/29/2014 | liveIN > Campaigns > Summer |
| | Families | Radio | 1/1/2014 - 12/21/2014 | liveIN > Campaigns > Summer > Radio |
| | Families | Newspaper | 4/1/2014 - 8/31/2014 | liveIN > Campaigns > Summer > Newspaper |
| | Families | Newsletter | 4/1/2014 - 8/31/2014 | liveIN > Campaigns > Summer > Newsletter |
| | Families | TV | 2/10/2014 - 7/31/2014 | liveIN > Campaigns > Summer > TV |
| | Families | Halloween | 7/2/2014 - 10/15/2014 | liveIN > Campaigns > Halloween |
| | Families | Radio | 5/11/2014 - 10/31/2014 | liveIN > Campaigns > Halloween > Radio |
| | Families | Newspaper | 5/18/2014 - 10/31/2014 | liveIN > Campaigns > Halloween > Newspaper |
| | Families | Christmas | 11/17/2014 - | liveIN > Campaigns > Christmas |