BrandMaker

Marketing Planner

User Manual

Version 7.1

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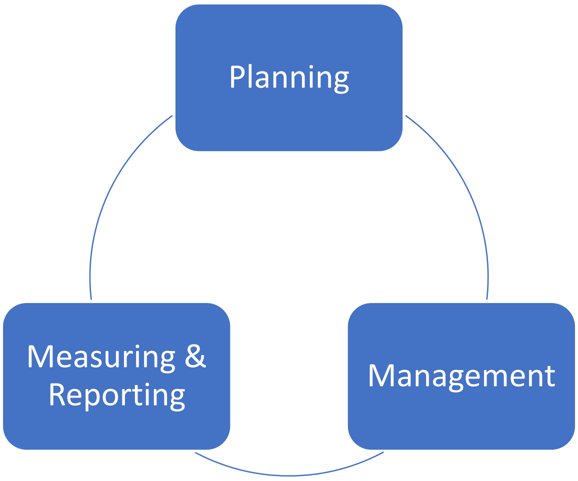
1 Introduction

The Marketing Planner enables the marketing teams to plan, manage, and measure and report on campaigns across all regions and channels. As a tool, the Marketing Planner provides full transparency and control over campaign planning and performance measurement for all stakeholders.



Marketing planning is an iterative process in which the main phases of planning, management and measuring and reporting alternate again and again. The structure of this manual is based on this and provides the following content:

- Design: You will gain an overview of the design and structure of the software.
- Planning: This chapter explains how to carry out strategic planning, budgeting and organizing marketing activities.
- Management: This chapter explains how to keep track of current activities, manage related orders and invoices, and enter other costs.
- Measurement and reporting: This chapter shows you how to measure the performance of your activities, evaluate the costs and create reports so that you can make a statement about the success of your measures at any time.

2 Structure

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 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

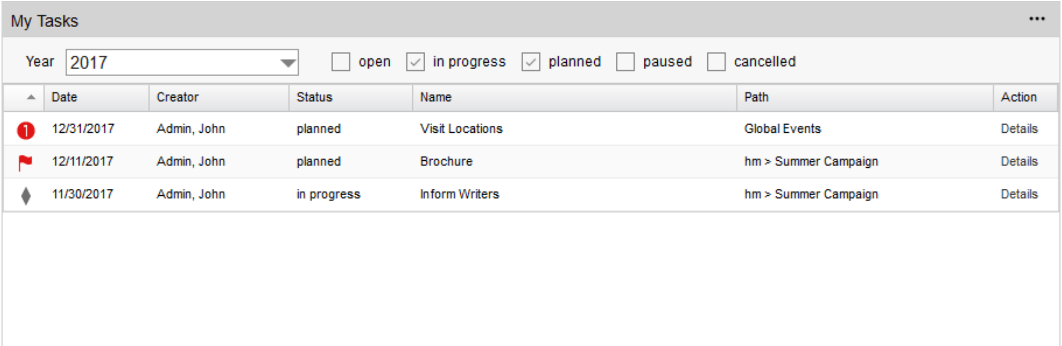
Jobs are displayed as *Open* until they are completed.

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

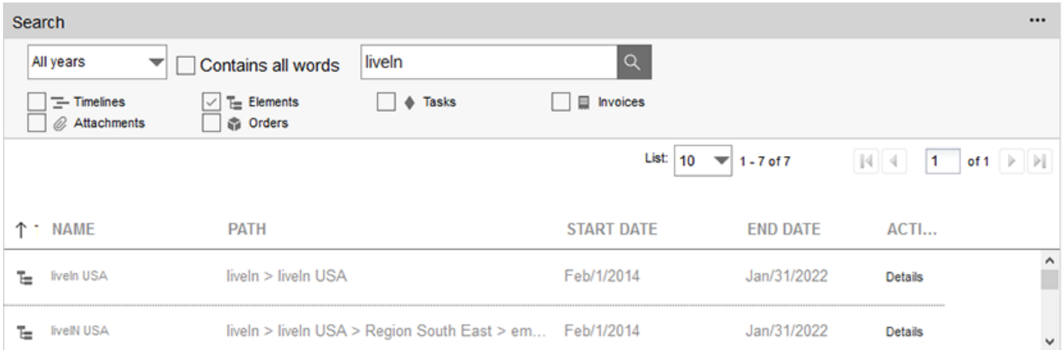
Click *Details* to open the *Edit task* dialog box and the detailed view of the element on the *Tasks* tab. You can use the *Timeline* filter above the table to limit the view to tasks from specific years. Click ...

to open the menu of the dashlet and access other functions; see Dashlet Menu on Page 15 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 15 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 15 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

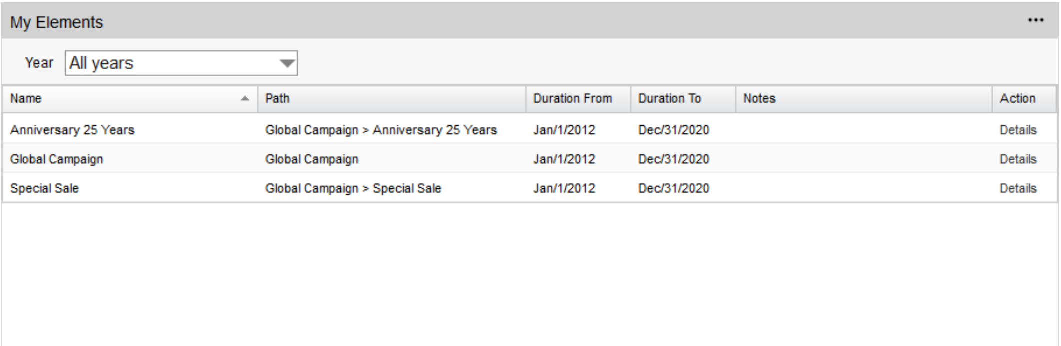
Click *Details* to open the *Edit KPI* dialog box and open the detailed view of the element on the *KPIs* tab. Click ··· to open the menu of the dashlet and access other functions; see Dashlet Menu on Page 15 for more information.

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 15 for more information.



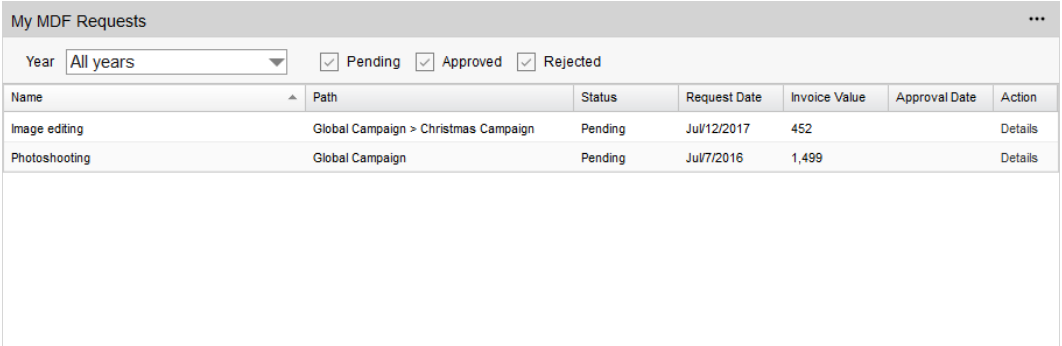
Name	Path	Duration From	Duration To	Notes	Action
Anniversary 25 Years	Global Campaign > Anniversary 25 Years	Jan/1/2012	Dec/31/2020		Details
Global Campaign	Global Campaign	Jan/1/2012	Dec/31/2020		Details
Special Sale	Global Campaign > Special Sale	Jan/1/2012	Dec/31/2020		Details

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 15 for more information.



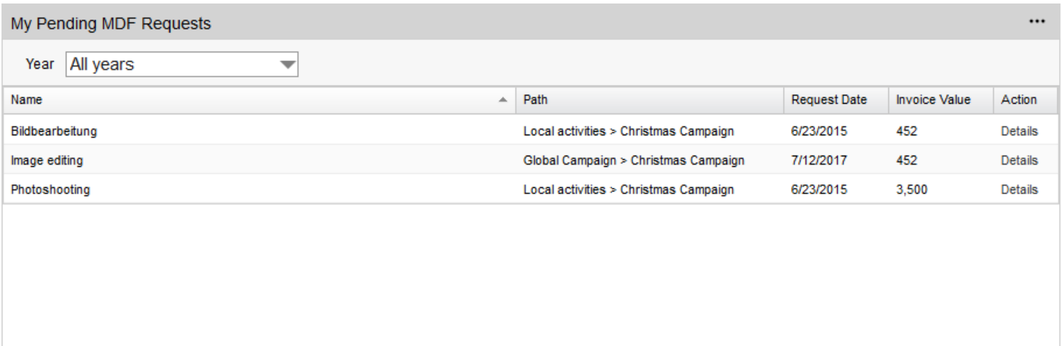
My pending MDF requests

> **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 183).

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 dashlet menu and access other functions; see Dashlet Menu on Page 15.



My watched elements

The dashlet lists the planning elements you are watching. For information on activating the watching of an element, see Chapter 4.2.1.
The table lists the watched elements with names, path as well as runtime 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 15 for more information.

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.

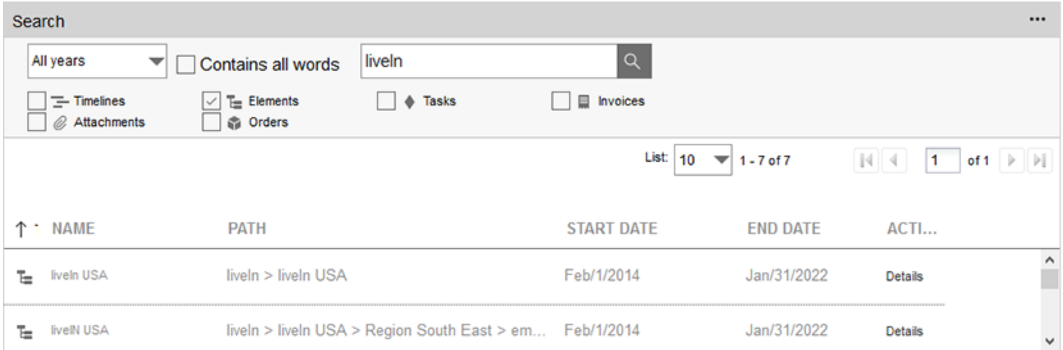
Step by step:

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 *, and Reference number* are searched.
   - *Elements*: This searches in the fields for the *Names*, *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*, *Suppliers*, *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. Click *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. The following functions can be accessed from the menu:

- *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 color 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.

Color 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:

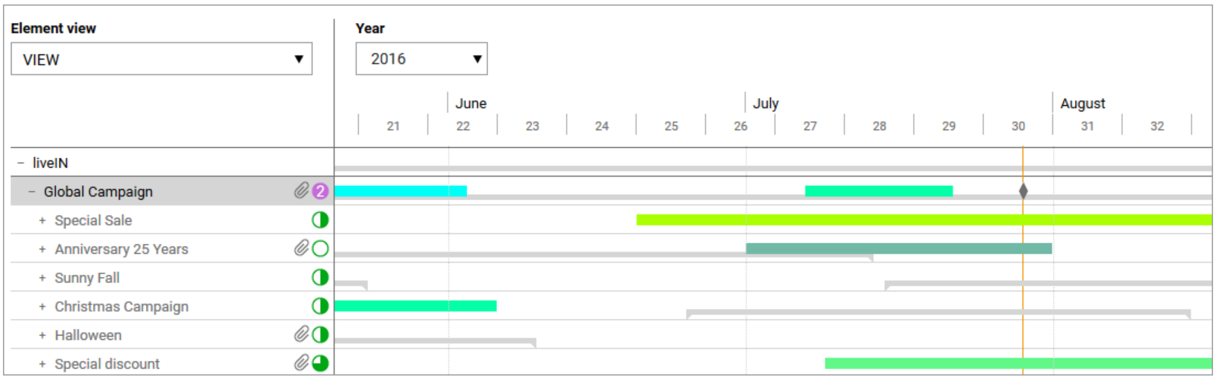
- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the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

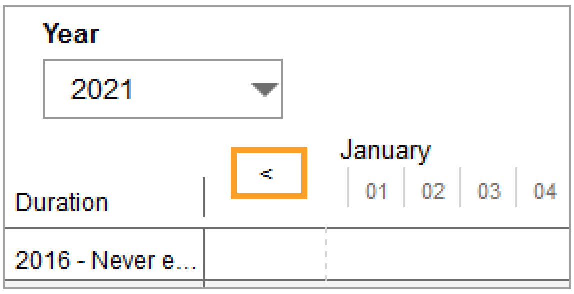
You can also reset the appearance of the dashboard. This changes the columns in the dashboard, the arrangement and size of the dashlets, and the colors of the title bars. To reset the appearance of the dashboard, choose *Reset to factory settings* in the dropdown list in the bottom section of the dashboard. 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.

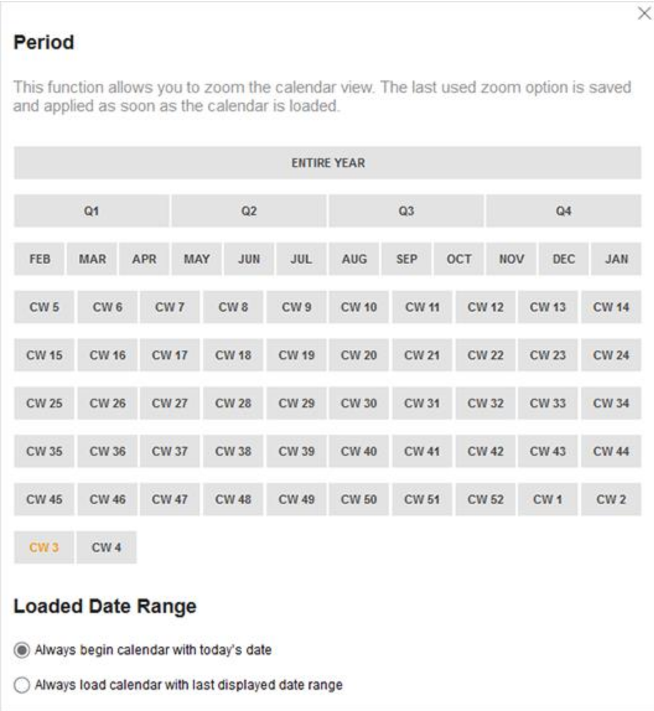
2.2 Calendar

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:

Section	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. If you want to switch to the previous or following year, click the arrow buttons to the right or left of the calendar display: 
Period	Select the part of the year that you want to view in the *Period* area to the left. • : This zooms in the view in stages, i.e. the calendar displays a shorter period. You can zoom up to the day level. • This zooms the view out in stages, i.e. the calendar displays a longer period. • : You call up the following described dialog.



Period

- 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.

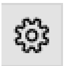
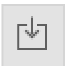
- Calendar weeks: You see the selected calendar week. If your browser window is large enough, the first 51 calendar weeks of your fiscal year will be left-aligned, while the last calendar week will be right-aligned. Please note that quarters will be divided up based on how your fiscal year is defined.

Loaded date range

Decide which date range will be displayed when you open the calendar. You have the following options:

- The calendar is always displayed with the current date on the left side, so the displayed time range starts with the current date.
- The calendar is always displayed with the last selected date range.

Further functions

Section	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: • Responsible person • Duration • External ID • Element ID • Element type • Element notes (See the detailed view of the *General* tab) • 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*.

Context menu

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

Function	Description
Target budget > *Add target budget*	You open the Add target budget dialog for the element. The detailed view of the element on the *Target budget* tab is displayed in the background.
Target budget > *Edit target budget*	If a target budget exists for the clicked time period, open the target budget in the Edit dialog box. If no target budget or several target budgets exist for the time period, the *Target budget* tab opens.
Invoice > *Adding an invoice*	This opens the *Insert Invoice* dialog box for the element. The detailed view of the element on the *Invoices* tab is displayed in the background.
Invoice > *Edit invoice*	If an invoice exists for the clicked time period, open the invoice in the Edit dialog box. If no or several invoices several invoices exist for the time period, the *Invoice* tab opens.
PO > *Add PO*	This opens the *Insert PO* dialog box for the element. The detailed view of the element on the *POs* tab is displayed in the background.
PO > *Edit PO*	If a PO exists for the clicked time period, open the PO budget in the Edit dialog box. If no orders or several orders exist for the time period, the *POs* tab opens.
MDF > *Insert MDF*	This opens the *Insert MDF* dialog box for the element. The detailed view of the element on the *MDF* tab is displayed in the background.
MDF > *Edit MDF*	If a MDF request exists for the clicked time period, open the request in the Edit dialog box. If no or several requests for the time period exist, 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 detailed 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 add all entered plan values of the individual months for the element.

2.3.1 Further information

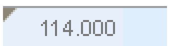
You can show the following additional information in separate columns:

- Responsible person
- Duration
- External ID
- Element ID
- Element type
- Element notes (See the detailed view of the *General* tab)
- 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.

2.3.2 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: • The sum of the sub-budgets exceeds the total budget. • The sum of the monthly budgets exceeds the yearly budget. **Note:** In a top-down year, the red corner is only displayed if discrepancies in the working currency occur.

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 budget* 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.

2.3.3 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 Chapter *Sorting options*.
Year 2016 ▼	Select the year whose planning elements are displayed as the tree structure.
Year view QUARTER MONTH	You can switch between the *Quarter view* and *Month view*. **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. 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). For more information, see chapter 4.1.
Applied configuration	This area shows the budget scale and currency type used to display the budget.

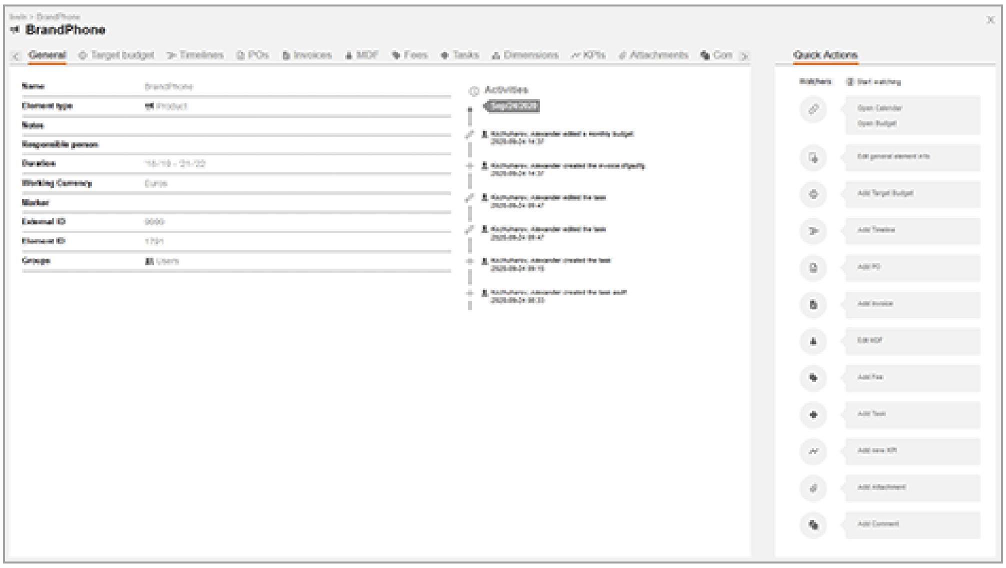
Icon/button	Description
	This exports the whole view or current view as an Excel file. You can decide whether changes are highlighted. The export can be downloaded or sent by e-mail.

> **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:

> **Note**
>
> Depending on your role and the functions used in your system, you will probably not see all 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.
- *Planned budget*: On this tab, you manage the initial planned budget and possible planned budget adjustments. For more information, see chapter 3.3.2.
- *Target budget*: On this tab, you manage the target budget of the planned element, see Chapter 0.
- *Timelines*: This tab contains a table overview of all timelines assigned to the element. For more information, see Chapter 3.2.
- *POs*: On this tab, you manage the POs that are assigned to the element. For more information, see Chapter 4.8.1.
- *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 80.
- *Fees*: On the tab you assign fees to the element and manage them, see Chapter 4.8.3.
- *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 116.
- *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 84.
- *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 153. The Dimensions Chapter on Page 200 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 153. The chapter KPIs on Page 207 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 73.

- *Comments*: This tab can be used to provide information for other users. See Leaving comments for planning elements on Page 153.

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 64.
- *Add annual planned budget*: You add an annual planned budget, either as an initial planned budget or as a planned budget adjustment.
- *Add monthly planned budget*: You add a monthly planned budget, either as an initial planned budget or as a planned budget adjustment. 3.3.2.
- *Add target budget:* You create a target budget, see Chapter 0.
- *Add Timeline*: This opens the dialog box for creating a timeline. Refer to the Chapter 3.2.1.
- *Add Order*: This opens the dialog box for creating a PO. Refer to the Chapter 4.8.1
- *Add Invoice*: This opens the dialog box for adding an invoice. Refer to the Chapter 0.
- *Add fees*: You create a target budget, see Chapter 4.8.3.
- *Edit MDF*: This opens the dialog box for requesting market development funds (MDF). Refer to the Chapter 0.
- *Add Task*: This opens the dialog box for creating a task. Refer to the Chapter 0.
- *Add new KPI*: This opens the dialog box for adding a KPI. Refer to the Chapter 5.1.1.
- *Add Attachment*: This opens the dialog box for adding an attachment. Refer to the Chapter 4.3.

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 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.

2.6 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.

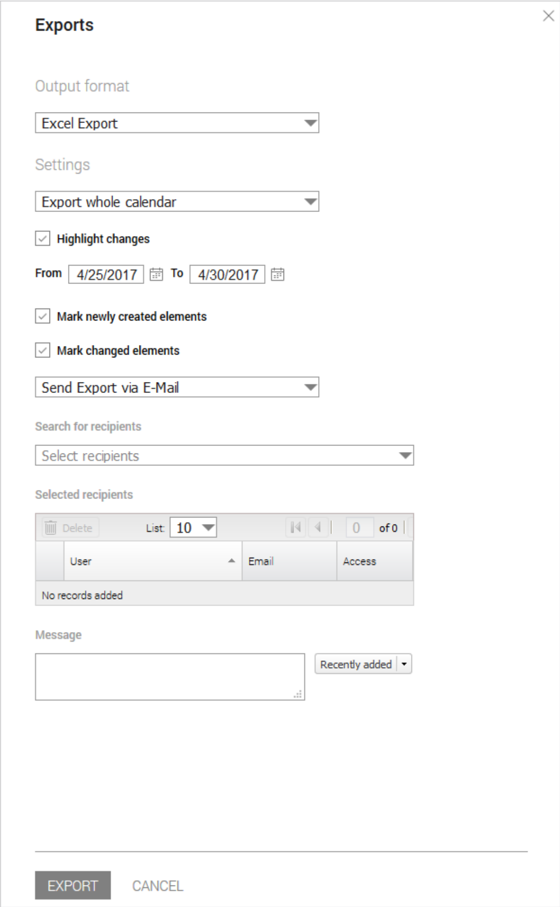
Exporting reports

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.
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. 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.



2.7 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 128.

2.8 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 5.3.
3. Select the year you want the link to open.
4. Click the *Link to view* button under the Elements views drop-down list.

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

5. 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 Planning

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

3.1 Structural planning

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*.

Create an element in a filtered view

> **Note**
>
> For more information on the filtering of elements, refer to Chapter 6.

You can create elements in a filtered view and thereby prepopulate the new element with the filter values. This applies when filtering on the following properties:

- Dimensions (with the exception of weighted multiple selections).
- Responsible Person
- Marker
- Currency
- Fees

The following properties cannot be prepopulated:

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

- Leafs

> **Note**
>
> You cannot create an item in a sorted view.

In some cases, prepopulating cannot be performed automatically, for example if the filter contains several values for a property to be populated with one value. In this case, you can select one or more properties in the Create Element dialog box.

The Create Element dialog box also lists the following information:

- List of the properties that can be prepopulated.
- List of properties that are included in the filter, but whose prepopulation is basically not possible.
- List of properties that cannot be prepopulated because the user does not have the necessary write permissions in the detailed 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 clicking the > *Element context menu* > *Additional information*:

For more information about content enrichment, see the chapter 4.7.

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.
Editing a job	**Note:** Only available if the planning element was created via a job in the Job Manager. You open the data sheet of the job that created the planning element. Note that you need appropriate access rights to view or edit details of the datasheet. When you close the datasheet, you are in Marketing Planner.
Additional Information	**Note:** Available only if additional information is added to the planning element. You open the additional information in an additional dialog box.
Rename	This changes the name of the selected planning element.
Adding markers	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. **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. **Note:** You cannot create an element in a sorted view.
Sort Elements	**Note:** Not for the root element. You can sort the sub-elements of the element for which you call the function: • *Sort ascending*: Sort the items from 0 to 9 and from A to Z. • *Sort descending*: Sort the items from X to A and from 9 to 0.
Expand sub-elements	**Note:** Not available in a sorted view. 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.

Function	Description
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.
Deleting	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.
Sending timelines 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.

3.1.1 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 box appears.

4. Enter an element name.
5. Optional: Choose an element type.
6. If you create the element in a filtered view: Choose whether certain properties of the element are prepopulated with the values of the current filter. For more information, see the Chapter 3.1.
7. If a prepopulated is to take place, but values cannot be selected automatically, activate the desired values in the lower area of the dialog box.
8. Observe any notes in the dialog box.
9. Click *Create and open*.

This creates a new element below the top element. The detailed 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 dropdown list 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. planned budget, invoices, POs, market development fund).

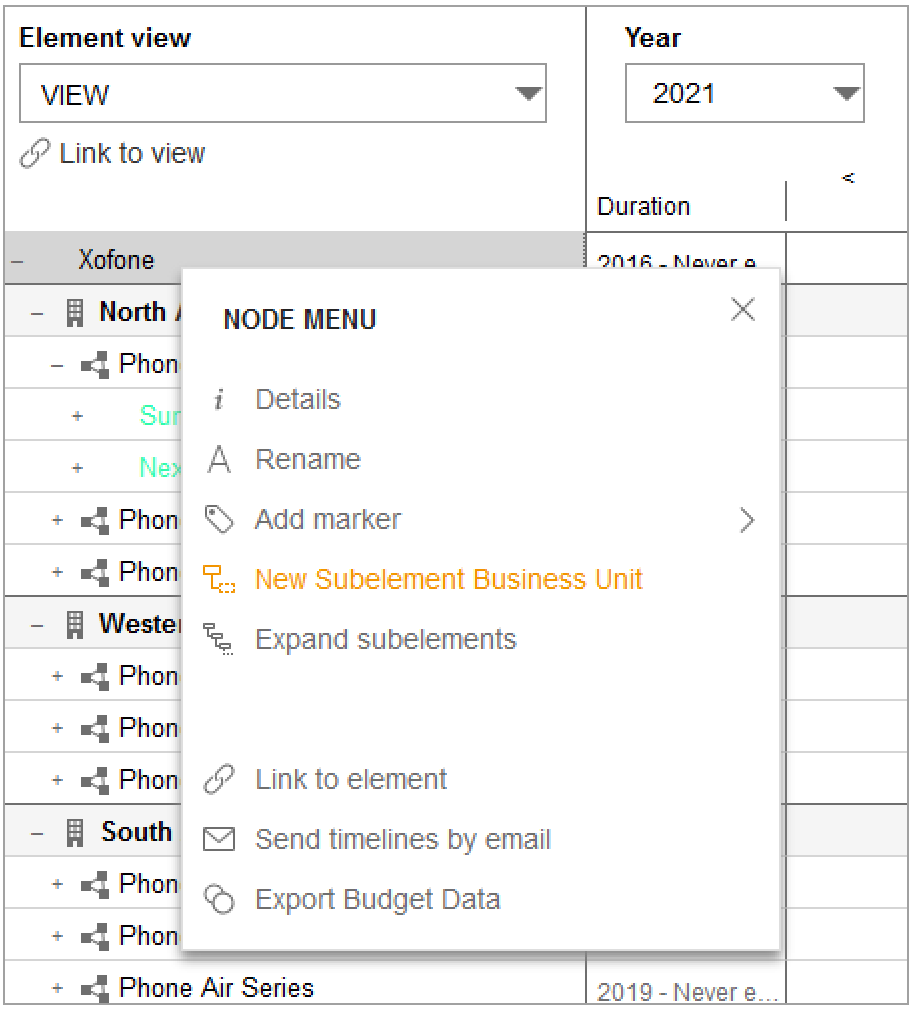
- *Markers*: Click *Add marker* to add a marker. You can use each marker once for an element.
- *External ID*: Enter an external ID. Note that you may only assign an external ID once because the element is controlled using the external ID when budget data is imported.
- *Element ID*: Displays the unique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



3.1.2 Filling out dimensions

You want to assign a type to a dimension and fill a value for the dimension.

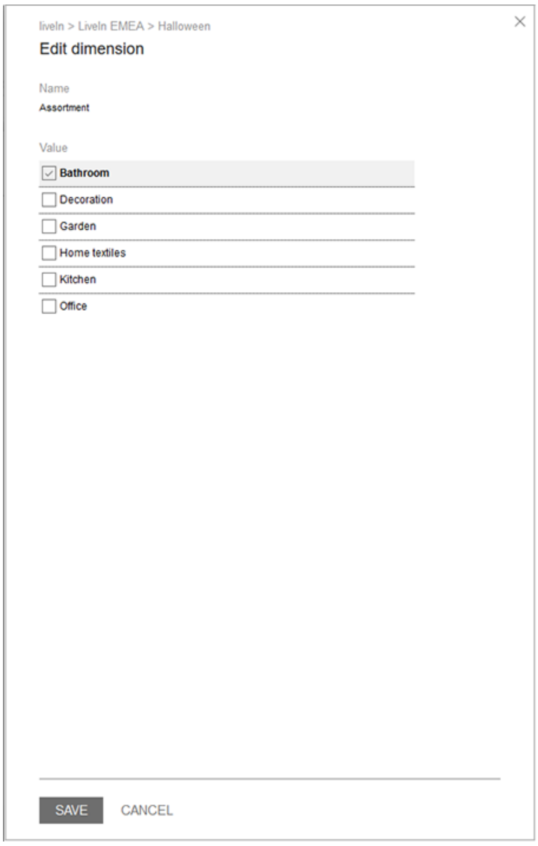
1. Open the detailed view of the element in which you want to fill in a value for a dimension.
2. Go to the *Dimensions* tab.

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*icon to adopt an existing inheritable dimension value from the parent element automatically.


liveIn > LiveIn EMEA > Halloween
Edit dimension
Name
Assortment
Value
Bathroom
Decoration
Garden
Home textiles
Kitchen
Office
SAVE
CANCEL

3.1.3 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.

3.1.4 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 35.

The new element has been created according to your specifications.

3.1.5 Copying and pasting elements

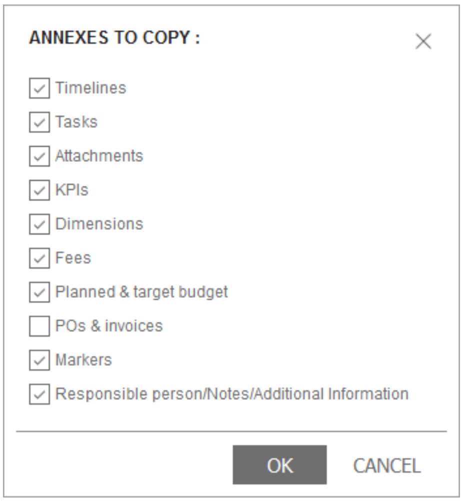
You want to copy one or more elements completely, including its sub-elements, and paste it as new planning elements. While copying it, you want to specify which attachments (such as timelines, tasks, or file attachments, for example) are to be copied.
Note that the runtimes of child elements must be 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.
Also note that you cannot copy planning elements with blanket or call orders. For information on blanket orders and call orders, refer to Chapter 4.8.1.

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*.

The *Copy attachments* dialog box appears.

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

> **Note**
> Only the dimensions or the values of the dimensions for which the *Copyable* checkbox is selected and to which the user has access will be 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.

3.1.6 Deleting an element

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

Attention!

When you delete, all associated data, such as invoices, attachments, or time periods, will be lost in all valid years. 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.

3.1.7 Deleting multiple elements

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

Attention!

When you delete, all associated data, such as invoices, attachments, or time periods, will be lost in all valid years. You cannot reverse the deletion.

1. Select the elements that you want to delete:
   - 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. Right-click one of the marked elements.

   The Context menu appears.
3. Click *Delete*.

   A confirmation prompt is displayed.
4. Clcik *OK*.

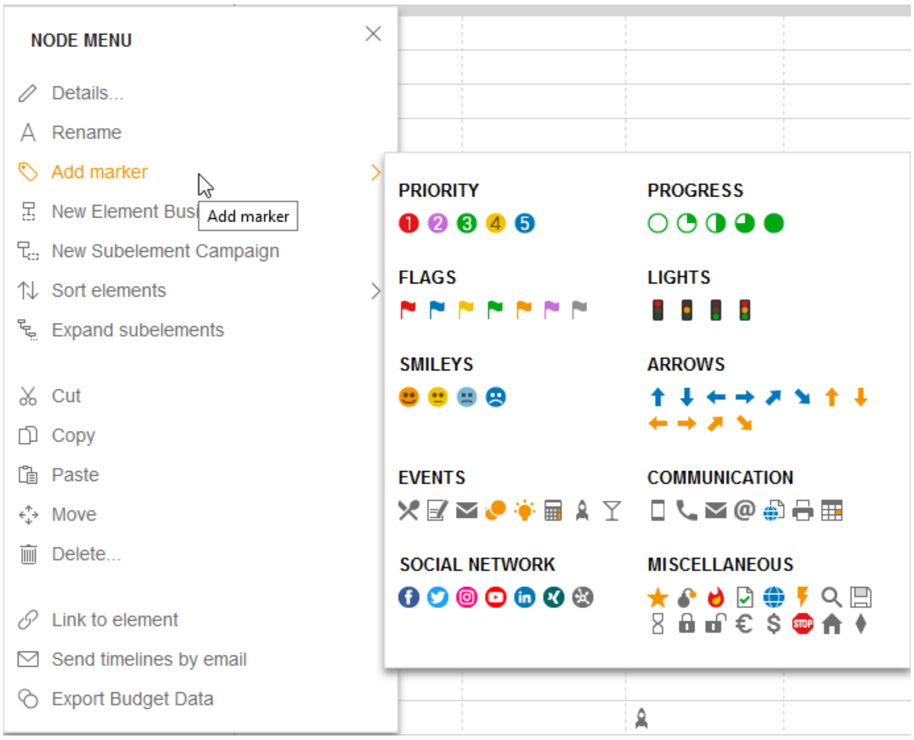
You have deleted the elements.

3.1.8 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.



3.1.9 Moving an element

You want to move an element within the tree structure to place it in a different position.
Also note that you cannot copy planning elements with blanket or call orders. For information on blanket orders and call orders, refer to Chapter 4.8.1.

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.

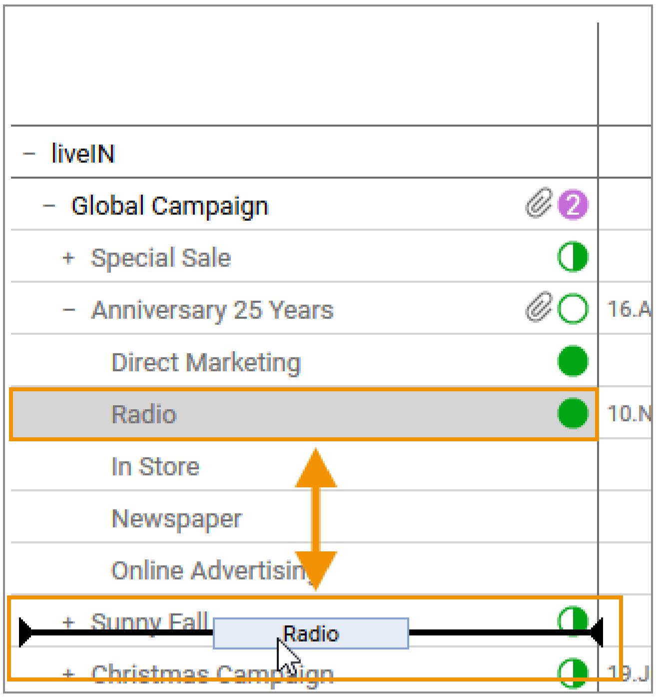
   > **Note:** You cannot move an element beneath itself but you can move it beneath another element on the same level. When you move an element, any existing sub-elements are moved along with it.

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.



3.2 Activity planning

3.2.1 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.

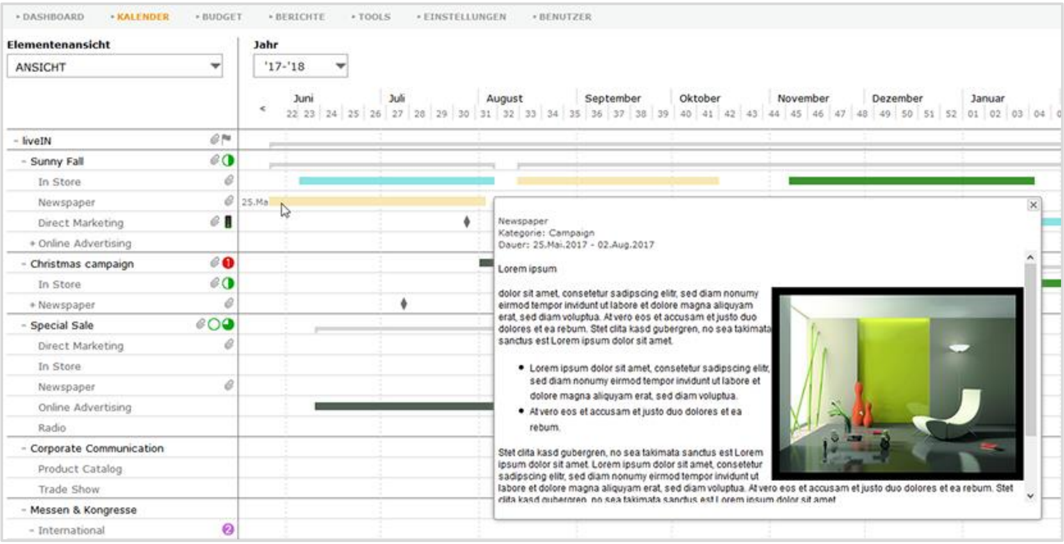
You can plan an advertising activity for or within a specific timeline. You define a start date and an end date for the timeline. A timeline can be:

- 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.

Content Enrichment

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 4.7.

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 time period	**Note:** You access this function by right-clicking a free area in the calendar. 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. • *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. This adds a cut or copied timeline.
Change Category	This changes the category of the timeline.
Selection assistant	• *Open*: This opens the selection assistant. • *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. • *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. • *Open group manager*: This opens the group manager.
Deleting	You use this command to delete the selected timeline.

3.2.1.1 *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:

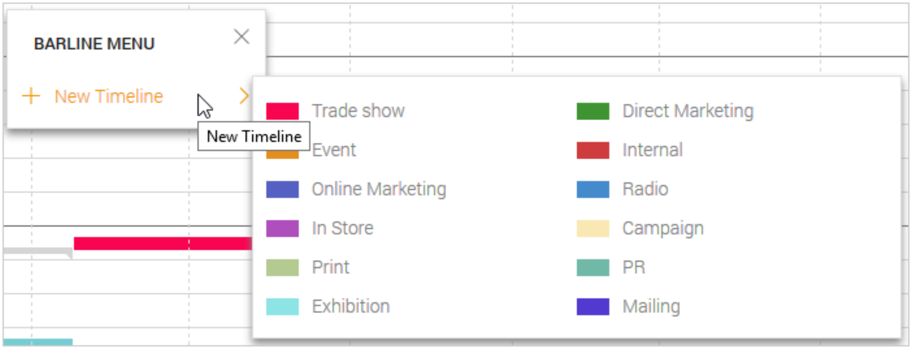
- In the calendar
- In the detailed view

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 detailed view

1. Open the *Detailed view* of the element and switch to the *Timelines* tab.
2. Click *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 see Page 64.
7. Click *Save* to confirm your entry.

You have created a timeline in the detailed view.

3.2.1.2 Deleting a timeline

You want to delete a timeline.

> **Attention:** 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.

3.2.1.3 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.

3.2.1.4 Moving a timeline using drag and drop

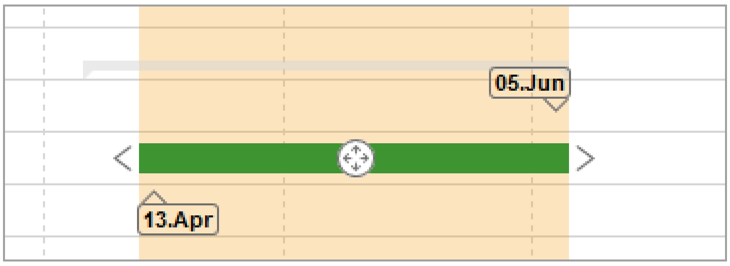
You want to move a timeline simply by using drag and drop.

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.

3.2.1.5 Moving multiple tasks/timelines

You have scheduled several promotions for the introduction of the `New product line`. For each promotion, you have created a time period and associated tasks in your marketing planning for the planning element . `New product line`. You have created a timeline for roadshows in `Hamburg`, `Berlin`, and Munich 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. Mark a timeline or task from the `New product line` planning element.
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.

3.2.1.6 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. Click *Save changes*.

The timeline or task is moved.

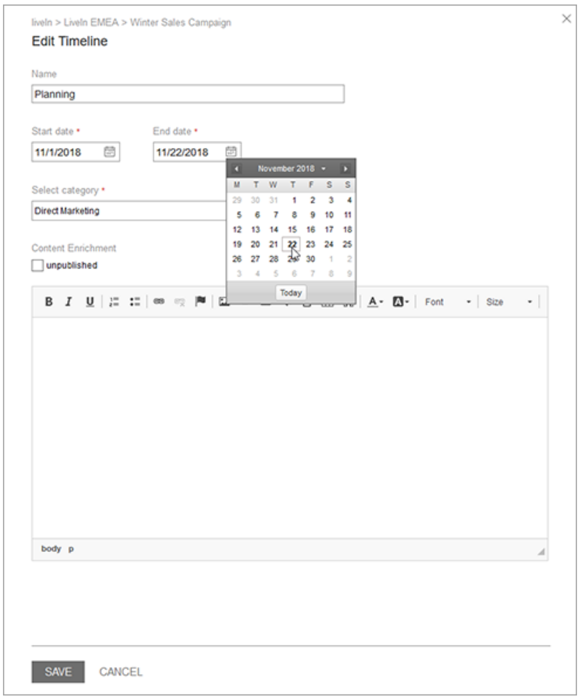
3.2.1.7 Moving timelines from the detailed view

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.



3.2.1.8 Sending timelines 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 e-mail* 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.

3.2.2 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

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.

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.

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 authorizations.

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. • *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. • *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. • *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. • *Open group manager*: This opens the group manager.
Select a task	**Note:** This is visible only if there are multiple overlapping tasks. This opens a dialog box in which you can select one of the overlapping tasks.
Deleting	This deletes the selected task.

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

3.2.2.1 Creating a simple task

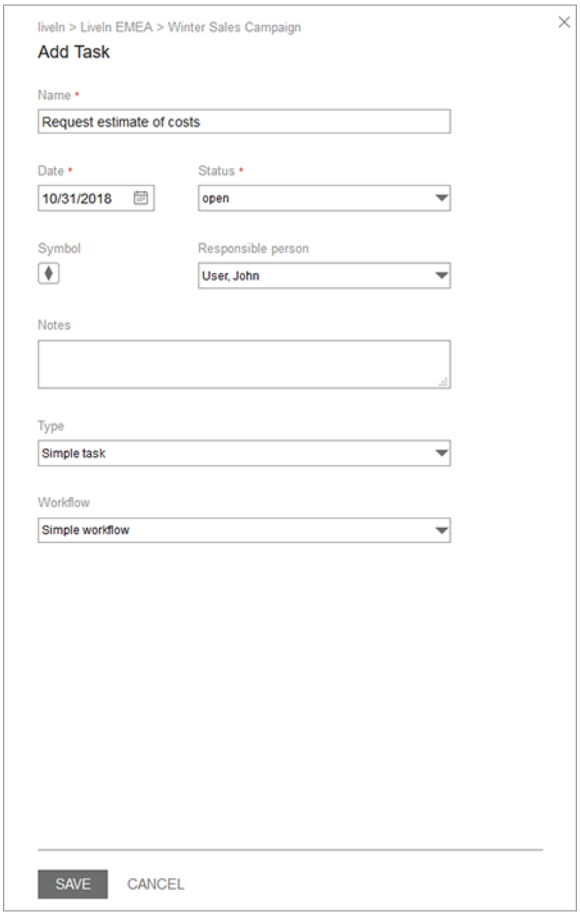
You want to create a simple task and assign it to a different user.

1. Open the *detailed view* for the element for which you want to create a task.
2. Go to the *Tasks* tab.
3. Click *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 dropdown list, 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).



3.2.2.2 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. Click *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 dropdown list, 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.

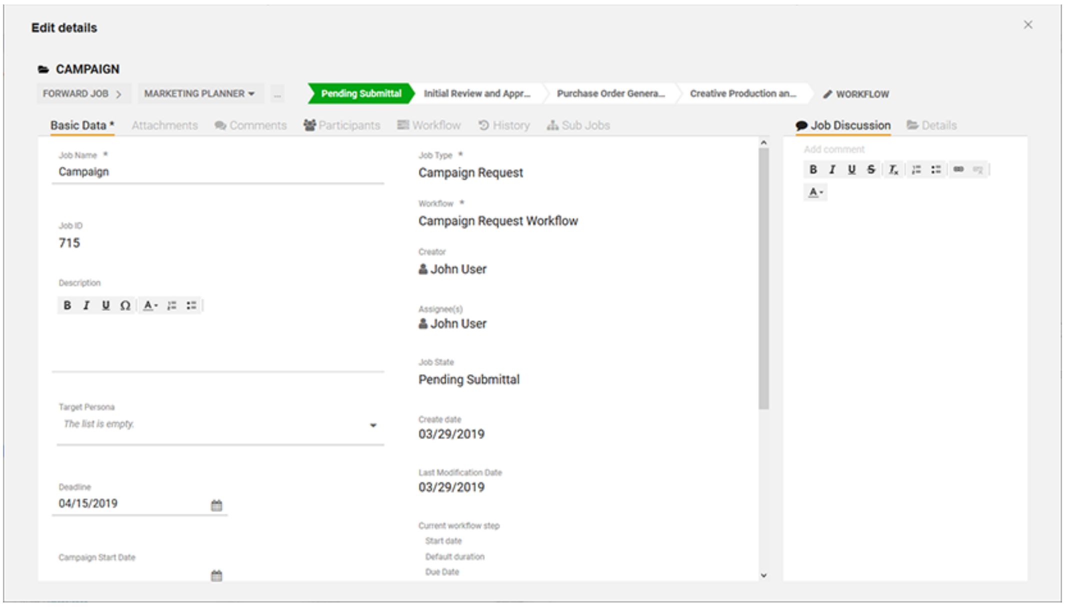
The job is created, and the job data sheet opens.

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).



3.2.2.3 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.

3.2.2.3.1 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:

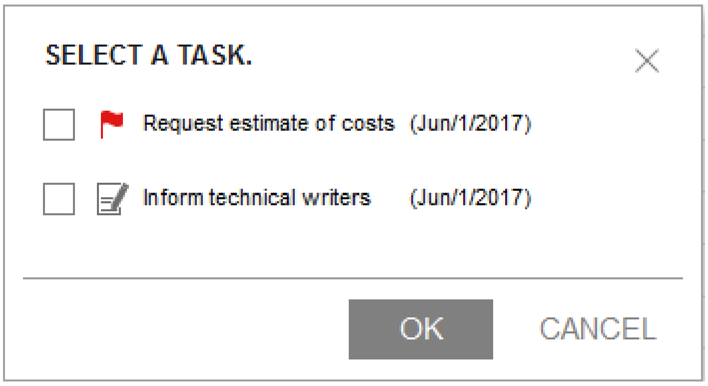
1. Open the context menu by clicking a *task* icon.
2. Choose the function *Select a task*.

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*.



3.2.3 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 60
- Extending group by task, period or group Page 60
- Excluding a task or timeline from a group Page 61
- Ungrouping Page 61

Note

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

You can also access these functions from the group manager (see Group manager on Page 62). 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 62). The Selection Assistant is especially helpful if you want to manage objects in the list view that are not displayed together on the screen.

3.2.3.1 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.

3.2.3.2 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.

3.2.3.3 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 62).

3.2.3.4 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.

3.2.3.5 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

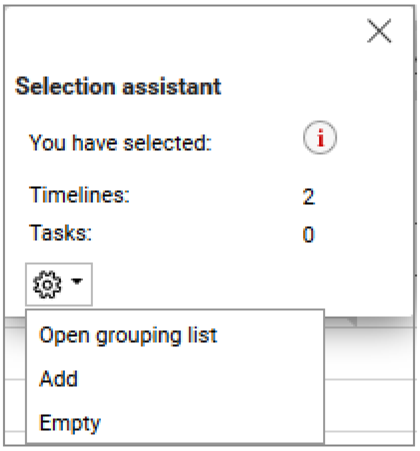
- If you access the group manager in the Selection Assistant by clicking the *gear* icon and then call up > *Open group manager*: The objects grouped together in the Selection Assistant.

3.2.3.5.1 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:



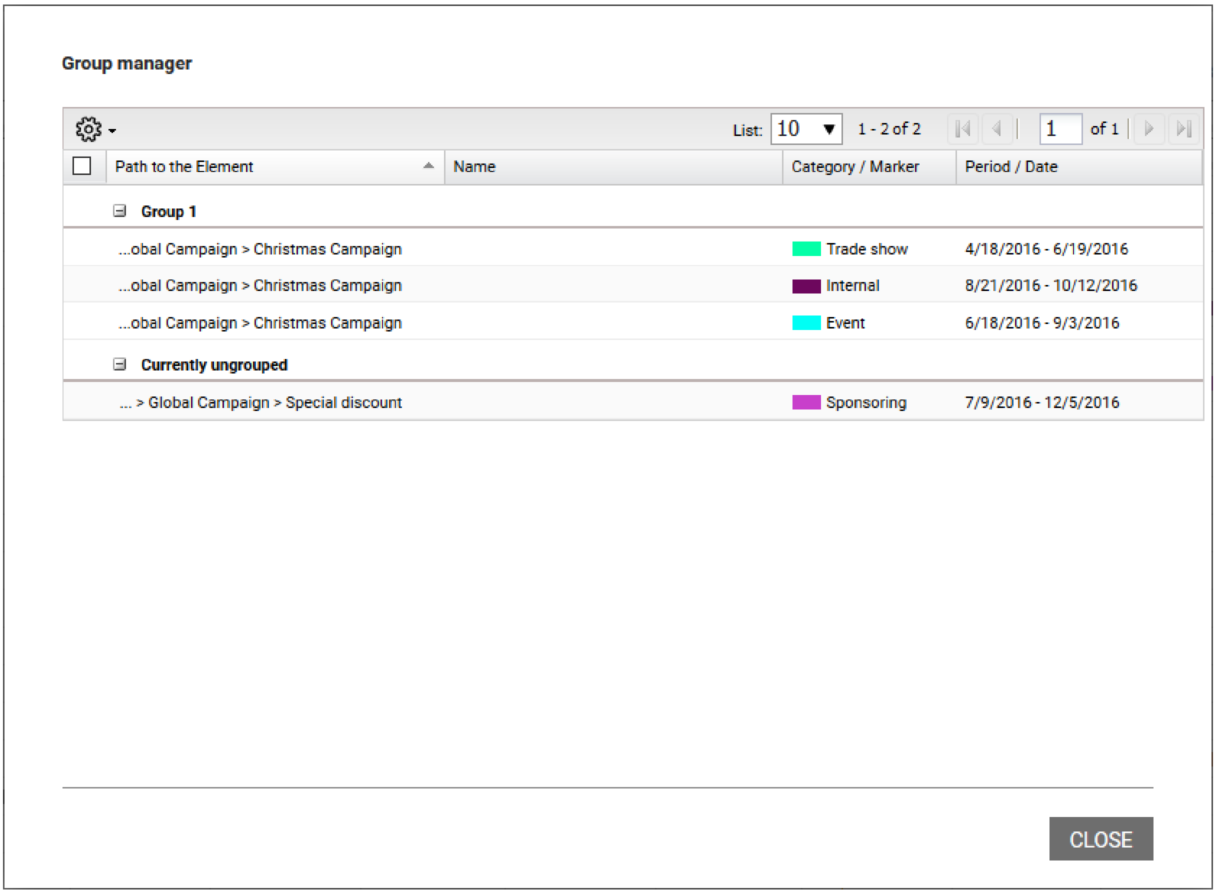
To add additional items to the group, go to the calendar view, select your required objects, and choose one of the following options:

- 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*.

3.2.3.5.2 Structure



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*.

3.3 Financial planning

Budgeting is the process of allocating financial resources to planned marketing activities. As a rule, budgeting is an iterative process in which target and plan values are adjusted again and again.

Marketing Planner offers you two functions with which you can design budgeting:

- *Target budget*: You use target budgets to map targets set by management. You can change a target budget at any time. The changes cannot be mapped.
  Target budgets are entered separately for each month; quarterly and annual values are calculated from them.
- *Planned budget*: With planned budgets, you represent the status of the planning. You specify an initial budget and can subsequently map any changes. The periods for which planned budgets are entered depend on the planning type of the year. Please refer to the following section.

Planning types

When creating a year, the administrator determines whether planned budgets are entered or calculated using the top-down or bottom-up method. The planning type defines the relationship between the monthly and the annual planned budgets:

- Top-Down: In this method, an annual planned budget is specified, which is manually distributed over the months. This planning type is suitable for companies whose marketing planning is created centrally and the individual marketing areas work with the centrally stored budgets.
- Bottom-Up: With this method, the planned budgets are entered for the respective months. The annual planned budget is calculated automatically from the sum of the monthly values. This budget calculation is suitable for companies whose individual marketing departments set their own budget plans and the budget total is not specified.

International budgeting: Currencies and exchange rates

You can assign a working currency to each element in the detailed view. The working currency is used to plan and manage activities, for example, to maintain budgets, orders and invoices.
To be able to compare planning elements with each other, a reference currency is defined for each year. An administrator maintains the exchange rates used to convert values in working currencies to the reference currency.

3.3.1 Target budgets

You use target budgets to map targets set by management. You can change a target budget at any time. The changes cannot be mapped.
Target budgets are entered separately for each month; quarterly and annual values are calculated from them.

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

Note that you can also efficiently create target budgets using the export/import function, see Chapter 6.2

Associated tasks

- Adding target budgets, see Chapter 3.3.1.1
- Editing target budgets, see Chapter 3.3.1.2
- Deleting target budgets, see Chapter 3.3.1.3

3.3.1.1 Add 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 box appears.

3. Optional: Enter the *Names* of the target budget in the topmost input field.
4. Enter the amount of the target budget in the *Value* field.
5. Select the *Publication date*.
6. Optional: Enter the cost type according to which the target budget is to be categorized. You can enter text freely or select an entry that has already been made.
7. Click *Save*.

You have created a target budget in the detailed view.

Note that you can also add a target budget by clicking the row of the element in the budget view. Click *Add target budget in the context menu*.

3.3.1.2 Edit target budget

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

   The target budget is marked.
3. Click *Edit*.

   The *Edit target budget* dialog box opens.
4. Edit the fields as desired.
5. Click *Save*.

You have edited a target budget in the detailed view.

Note that you can also edit a target budget by clicking the row of the element in the budget view. Click *Edit target budget* in the context menu. If a target budget is assigned to the month you clicked on, this target budget will be opened in the edit dialog box. If no or more target budgets are assigned to the month, the detailed view of the element is opened on the Target Budget tab.

3.3.1.3 Deleting a target budget

Attention!

You cannot undo the deletion of a target budget.

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

   The target budget is marked.
3. Click *Delete*.

   A confirmation prompt is displayed.
4. Click *OK*.

You have deleted the target budget.

3.3.2 Planned budget

With planned budgets, you represent the status of the planning. You specify an initial budget and can subsequently map any changes.
The periods for which planned budgets are entered depend on the planning type of the year. Please refer to the following section.

Planning types

When creating a year, the administrator determines whether planned budgets are entered or calculated using the top-down or bottom-up method. The planning type defines the relationship between the monthly and the annual planned budgets:

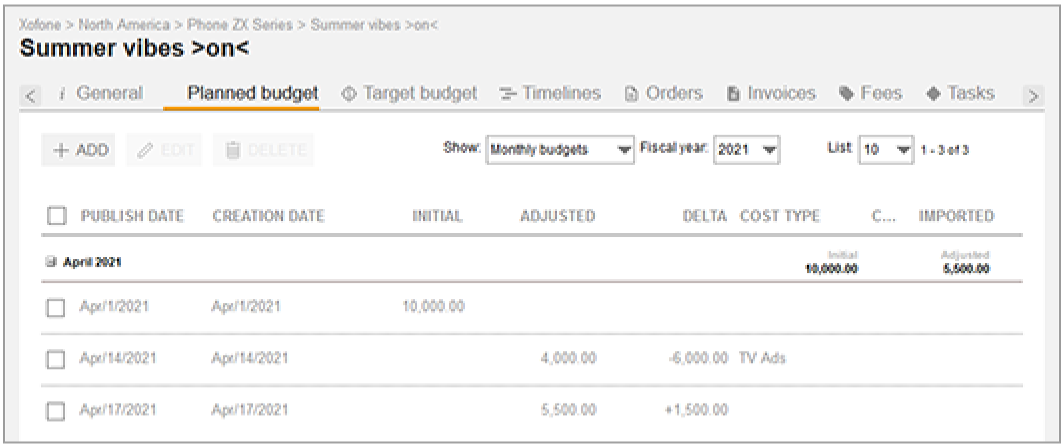
- Top-Down: In this method, an annual planned budget is specified, which is manually distributed over the months. This planning type is suitable for companies whose marketing planning is created centrally and the individual marketing areas work with the centrally stored budgets.
- Bottom-Up: With this method, the planned budgets are entered for the respective months. The annual planned budget is calculated automatically from the sum of the monthly values. This budget calculation is suitable for companies whose individual marketing departments set their own budget plans and the budget total is not specified.

Documenting changes

By documenting the changes, you can see how the planned budget is developing:

- 01 April: Initial budget - Total: $10,000
- 14 April: Budget reduction due to unforeseen events - -$6,000; total: $4,000
- 17 April: Renegotiation - +$1,500; total: $5,500.

In the detailed view, this is displayed as follows:



At the top of the tab, switch between displaying monthly and annual planned budgets.

Input

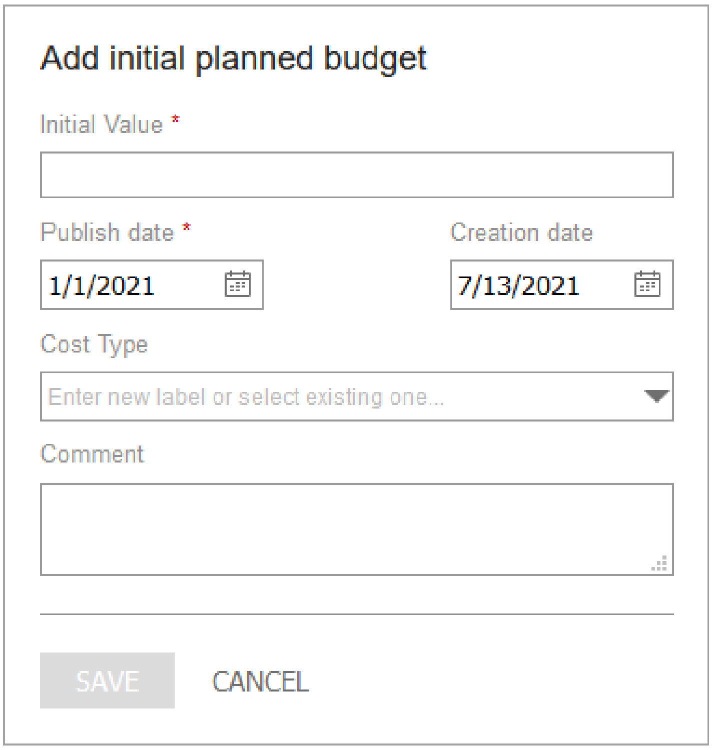
When adding the planned budgets, the publication date decides for which year or month the planned budget is valid. The creation date determines the day of the decision.

You have two options, enter an initial planned budget or a change:

- Open the detailed view of the element and switch to the *Planned budget* tab.
- You enter values under > *Marketing Planner* > *Budget* directly into the cell of the element in the respective plan column. To do so, double-click the cell.

Note that the direct entry under > *Marketing Planner* > *Budget* depends on a setting that an administrator makes for the system:

- You enter the value directly into the cell, then the following data of the planned budget will be set automatically:
  - The entered value is always interpreted as a new total amount. If the cell is filled for the first time, the value is set as the initial budget. If an amount has already been displayed, a change budget is created with the following value: [new value] - [previous value].
  - The publication date is set as follows: For an annual planned budget, the first day of the first month in the selected fiscal year is entered. For a monthly planned budget, the first day of the month (in the selected fiscal year) is entered.
  - The current date is set as the creation date.
  - The *Cost type* and *Comment* properties remain empty.
- A dialog box opens where you can set the data yourself:



3.3.2.1 *Create planned budget or planned budget adjustment.*

This chapter explains how to create a planned budget or a planned budget adjustment.

> **Note**
>
> When you first create a planned budget for a period, an initial planned budget is automatically created. If another planned budget is subsequently created for the same period, this is recorded as a planned budget adjustment.

You can directly create an initial planned budget or a planned budget adjustment both in the detailed view and under > *Marketing Planner* > *Budget.*

In the detailed view

1. Choose > *Marketing Planner* > *Budget*.
2. Open the detailed view of the planning element for which you want to create a planned budget.
3. Switch to the *Planned budget* tab.
4. In the *Display* field, specify whether you want to create an annual or monthly budget.
5. Define the fiscal year for which you want to create a planned budget.
6. Click *Add*.

   If no planned budget has been created for the period so far: The *Add initial planned budget* dialog box is displayed.
   If an initial planned budget has already been created for the period: The *Adjust planned budget* dialog box is displayed.
7. Enter the amount: If you are creating an initial planned budget, enter the total amount. If you are creating a planned budget adjustment, enter the delta, e.g. for a reduction of €100,000, enter the value *-100,000.*
8. Set the publication date.
9. Optional: Change the creation date and enter a cost element or comment.
10. Click *Save*.

The initial planned budget or planned budget adjustment has been created.

Under > *Marketing Planner* > *Budget*

1. Click > *Marketing Planner* > *Budget*.
2. Make sure that the columns for planned budgets are shown in the required time range. For details, refer to the Chapter 6.2.
3. Double-click the plan column of the time range for which you want to create a planned budget.
   - If the cell is displayed in edit mode:

   a. Enter the new total amount.
   b. Press the Enter key.

- If a dialog box appears:

c. Enter the initial amount or, as a planned budget adjustment, the change value.

d. Set the publication date.

e. Optional: Change the creation date and enter a cost element or comment.

f. Click *Save*.

The planned budget or planned budget adjustment has been created.

3.3.2.2 Edit initial planned budget or planned budget adjustment

This chapter describes how to edit an initial planned budget or planned budget adjustment.

Note

Use this action to correct errors. To document a change to the planned budget, refer to Chapter 3.3.2.1.

You can only edit a planned budget from the detailed view.

1. Click > *Marketing Planner* > *Budget*.
2. Open the detailed view of the planning for which you want to edit a planned budget.
3. Switch to the *Planned budget* tab.
4. In the *Display* field, specify whether you want to edit an annual or monthly budget.
5. Define the fiscal year for which you want to edit a planned budget.
6. Double-click the planned budget or planned budget adjustment or select the checkbox of the planned budget or adjustment and click *Edit*.

The *Edit initial planned budget* dialog box or the *Edit planned budget adjustment* dialog box is displayed.

7. Optional: If you want to edit the initial planned budget: Enter the new value. If you want to edit a planned budget adjustment: Enter the delta, for example, for a reduction of 100,000, enter the value *-100,000*.
8. Optional: Edit the publication date.
9. Optional: Change the creation date and edit the cost type or comment.
10. Click *Save*.

The planned budget or planned budget adjustment has been edited.

3.3.2.3 *Deleting a planned budget*

This chapter covers how to delete an initial planned budget or a planned budget adjustment.

> **Note**
>
> If you delete a initial planned budget, all the associate adjustments are also deleted.

You can only call up a planned budget from the detailed view.

1. Click > *Marketing Planner* > *Budget*.
2. Open the detailed view of the planning for which you want to delete a planned budget.
3. Switch to the *Planned budget* tab.
4. In the *Display* area, specify whether you want to delete an annual or monthly budget.
5. Define the fiscal year for which you want to delete a planned budget.
6. Activate the planned budget or adjustment checkbox and click *Delete*.

A confirmation prompt is displayed.

7. Clcik *OK*.

f you delete the initial planned budget: Another confirmation prompt informs you that - if you proceed - all subsequent planned budget adjustments will also be deleted.

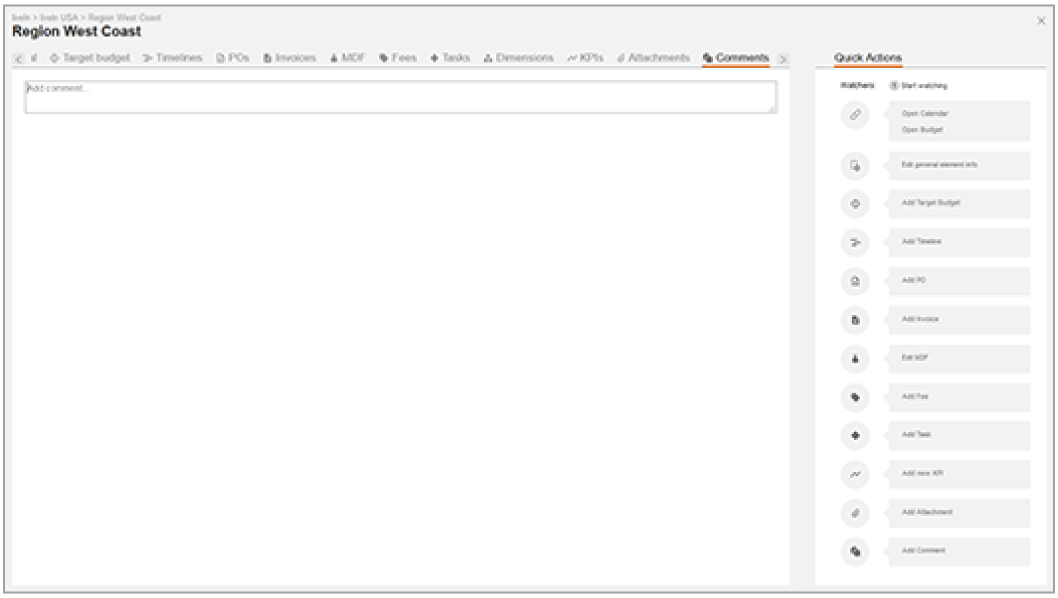
8. Clcik *OK*.

The planned budget or the planned budget adjustment is deleted. If you have deleted a planned budget adjustment, the current total value is recalculated.

4 Management

4.1 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 into the comment field. Then click *Save* to save your comment.
The comment field has a user name function: if @ is entered followed by a name, a list of matching names of users in the system will open. Select the desired user by clicking on it. 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.

4.2 Watching planning elements

Every user who has access to the detailed view can watch the planning elements. As a watcher, you will be notified by e-mail when the following item information changes:

- General information (*General* tab in the detailed view). Exceptions are changes in the assigned user groups and content enrichment.
- Target budget
- Timelines
- POs
- Invoice
- Market 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.
Provided that your user role has the appropriate permission, you can edit the watchers of an element, i.e. add or delete users as watchers.

You will learn how to manage the watching of an element in the following chapters:

- Start watching, see Chapter 4.2.1
- Stop watching, see Chapter 4.2.2
- Edit a watcher of an element, see Chapter 4.2.3

4.2.1 Start watching

1. Open the detailed view of the element that you would like to watch.
2. Click *Start watching* in the *Quick actions* area above.

You have started observing the element and will be notified by e-mail if any changes are made. Also, the planning element is listed in your *My Watched Elements* dashlet.

4.2.2 Stop watching

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

You have stopped the watching of the element.

4.2.3 Edit the watchers of an element

1. Open the detailed view of the element whose watchers you want to edit.
2. In the *Quick Actions* area at the top, click the number by the *Watchers*.

   A dialog opens where you can enter new users as watchers as well as remove watchers already entered.

3. Optional: Add watchers:
   a. Click in the search line.

   A list of all users with access to the element opens.

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

   The list is reduced to matching users.

   c. Select a user.

   The user is added to the list of watchers.

   d. Repeat steps a to c if you want to add more watchers.
4. Optional: Remove the watchers:
   a. Click the recycle bin icon next to the asset type that you want to delete.

   The user is removed from the list of watchers.

   b. If you want to add more users, repeat step a.
5. Close the dialog box by clicking the X in the top right.

You have edited the watchers of the element.

4.3 Attachments

4.3.1 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 the *Brand Template Builder* module.
- You can attach a download link to an asset from the Media Pool module.

4.3.2 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. Please refer to the *Attachments* tab.
- You can download attachments which have already been linked to an order or an invoice. Please refer to the *POs* tab and *Invoices* tab on Page 77.

> **Note**
>
> Please note that attachments can also be linked. These links cannot be downloaded.

4.3.2.1 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 is 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 158.

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. For the file you want to download, click *Download* in the *Download* column.

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.

4.3.2.2 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 158.

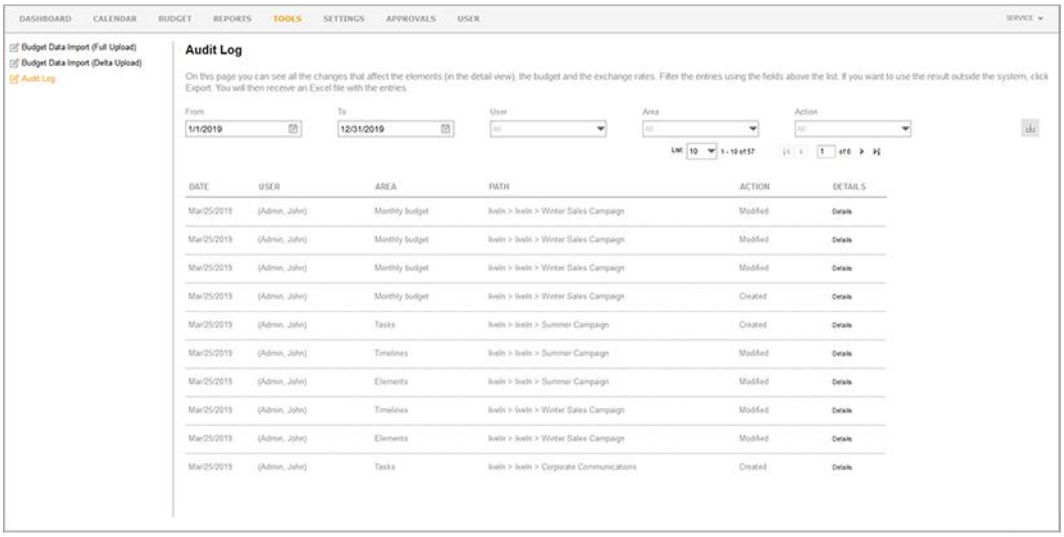
Downloading attachments from the Orders and Invoices tabs

1. Open the detailed view of the element where you would like to download files.
2. Go to the *POs* 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.

4.4 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 marked in color. If you click the button in the detailed change log, the displayed data will be exported. The changed values are also marked in color here.

You can also export multiple entries of the audit log. If necessary, filter the entries under > *Marketing Planner > Tools > Audit log* and then click the button. You will get an Excel file with the displayed entries.

4.5 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 *Status* dropdown list.
4. Choose *Save* to confirm your entry.
5. Choose *X*.

The detailed 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.

4.6 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.

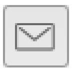
Step by step

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: • display the job workflow, • create a job copy, • 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*.

4.7 Content Enrichment

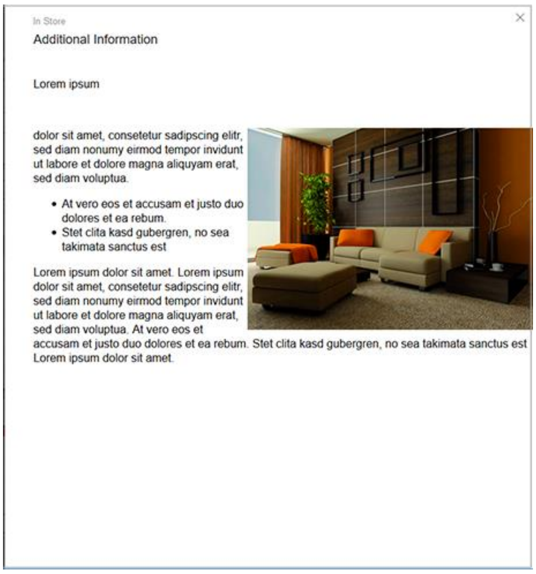
Note

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 on the planning element

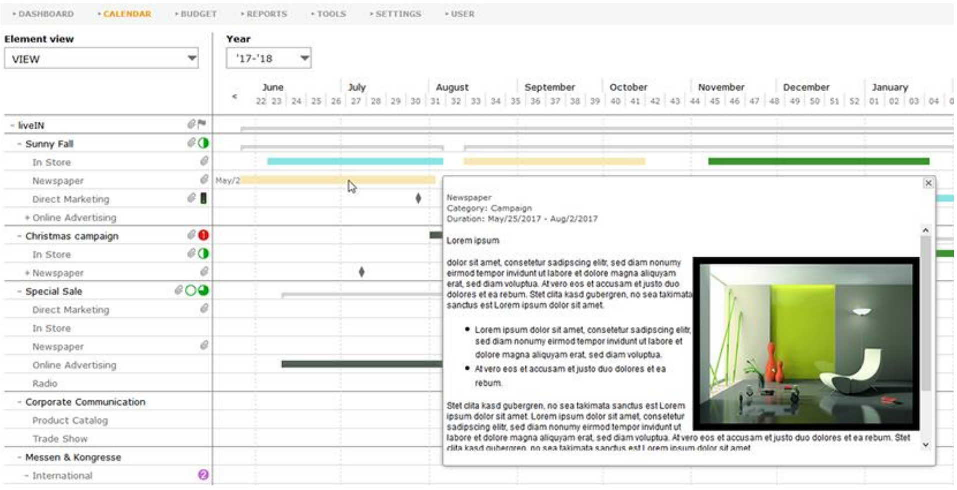
You can access additional information about a planning element by opening the element context menu and choosing *Additional Information.* If you select the function, the following dialog box will be shown to the right containing the additional information:



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

Content Enrichment on the timeline

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 Page 83
- Table see Page 86
- Hyperlinks see Page 88
- Images see Page 90

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

- Slideshow see Page 92
- PDF see Page 102
- Report from the Reporting Center (see Page 97)
- HTML5 videos see Page 94

> **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 Page 100

> **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.

4.7.1 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, click *Edit general element info* button.

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 64.
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 detailed 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.

4.7.2 Enriching an timeline with additional information

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.

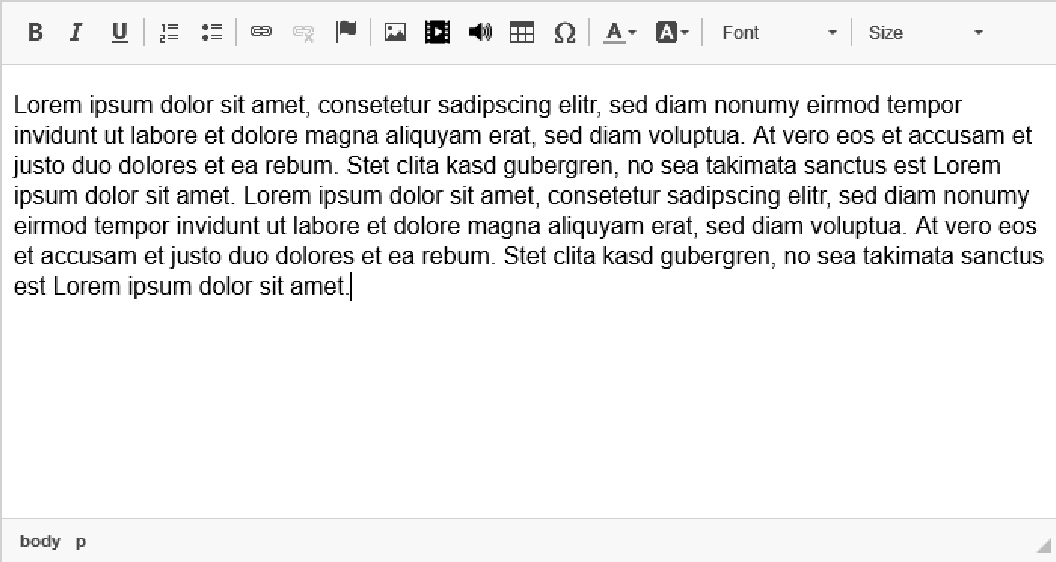
The detailed view of the corresponding element and the *Edit timeline* dialog box will open.

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.

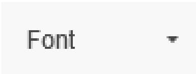
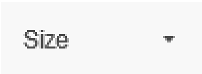
4.7.3 Text and special characters

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

Function	Description
	Background color
	Font
	Font size

4.7.4 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.
Orientation	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: • *Data*: The cells are data cells. • *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.

4.7.5 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 Inserting hyperlink to a URL see Page 88.
- *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 89).
- *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 see Page 89.

Explanation of the properties of links

Enter the link properties in the *Link* dialog box 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.

4.7.5.1 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 Timeline Context Menu and click *Details*. The *Edit timeline* dialog box 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. Click .

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. Click *OK*.

The hyperlink has been added in the editor.

4.7.5.2 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 Timeline Context Menu and click Details. The Edit timeline dialog box 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. Click .

The *Anchor properties* dialog box is displayed.

3. Enter an anchor name.
4. Clcik *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. Click .

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. Click *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.

4.7.5.3 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 Timeline Context Menu and click Details. The Edit timeline dialog box 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. Click .

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. Click *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.

4.7.6 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 Timeline Context Menu and click Details. The Edit timeline dialog box opens.

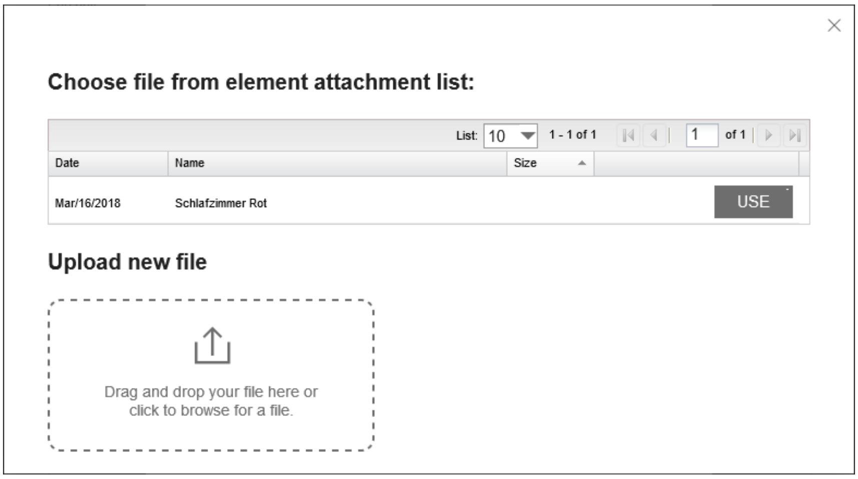
Insert pixel graphic

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

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. Click *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.

Function	Description
Width	Enter the width in pixels for the display in the additional information. **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. **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.
Orientation	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.

4.7.7 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 Timeline Context Menu and click Details. The Edit timeline dialog box opens.

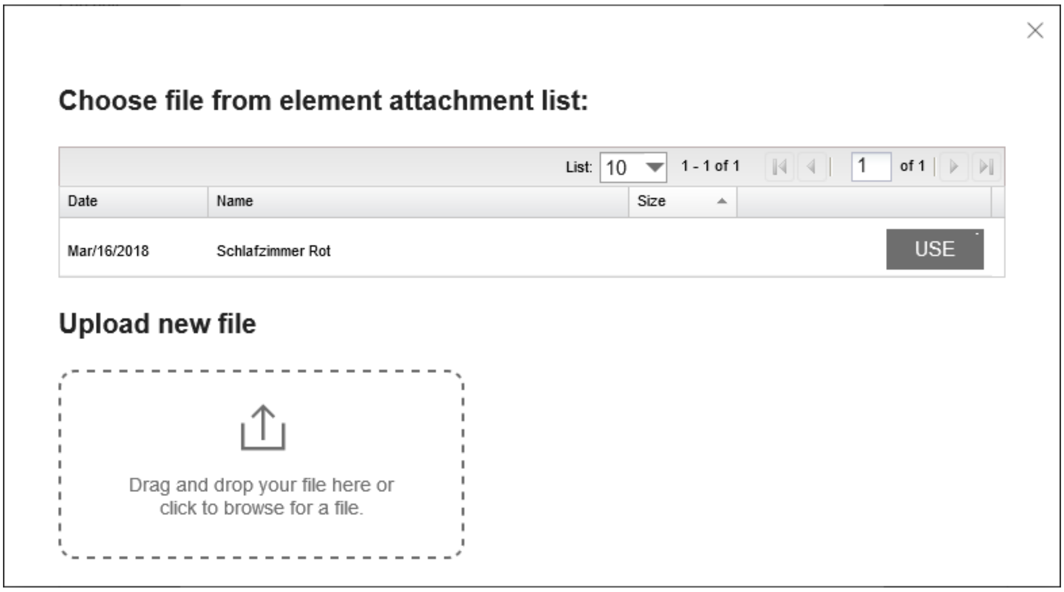
Adding a slideshow

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

The *Slideshow* dialog box opens.

3. Click *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. Click *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. 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.

4.7.8 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 Timeline Context Menu and click Details. The Edit timeline dialog box 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*.

   The attachment list of the element is displayed.

   b. 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.

   b. 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.
   c. The file will be uploaded as an attachment to the element and will appear in the attachment list.
   d. 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. Click *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. The button allows users to download the PDF.
Link Text	**Note:** This is visible only if the *Allow download?* Property is activated. Define the labeling of the button that will be used to download the PDF.
Orientation	Select the alignment of the preview image of the PDF in the display: • *Center*: The preview image is centered. Text cannot flow around the preview image. • *Left*: The preview image is aligned left. If space is available, text flows around the preview image. • *Right*: The preview image is aligned right. If space is available, text flows around the preview image. • *None*: The preview image is not aligned. Text cannot flow around the preview image.
Scaling	Define how the content is displayed in the window: • No scaling: The content is displayed unscaled. • Height fill: The content or a page is displayed in full height in the window. • Width fill: The content or a page is displayed in full width in the window. • 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.

4.7.9 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 Timeline Context Menu and click Details. The Edit timeline dialog box opens.

Adding reports

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

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. Click *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.
Orientation	Select the alignment of the report in the display: • *Center*: The report is centered. Text cannot flow around the report. • *Left*: The report is left-aligned. If space is available, text flows around the report. • *Right*: The report is right-aligned. If space is available, text flows around the report. • *None*: The report is not aligned. Text cannot flow around the report.

Function	Description
Scaling	Define how the content is displayed in the window: • No scaling: The content is displayed unscaled. • Height fill: The content or a page is displayed in full height in the window. • Width fill: The content or a page is displayed in full width in the window. • 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.

4.7.10 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 Timeline Context Menu and click Details. The Edit timeline dialog box opens.

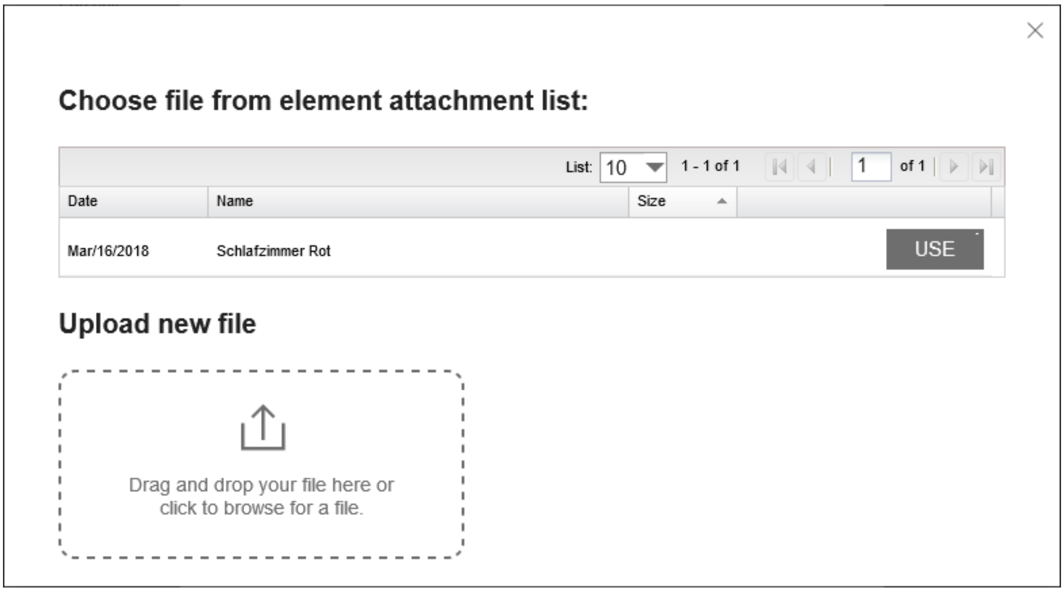
Insert HTML5 videos

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

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. Click *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 Infos* tab:

Function	Description
Width	Enter the width in pixels for the video player display in the additional information.
Height	Enter the height in pixels for the video player display in the additional information.
Orientation	Select the alignment of the video player in the display: • *Center*: The video player will be centered. Text cannot flow around the video player. • *Left*: The video player will be aligned left. If space is available, text will flow around the video player. • *Right*: The video player will be aligned right. If space is available, text will flow around the video player. • *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.

4.7.11 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 Timeline Context Menu and click Details. The Edit timeline dialog box opens.

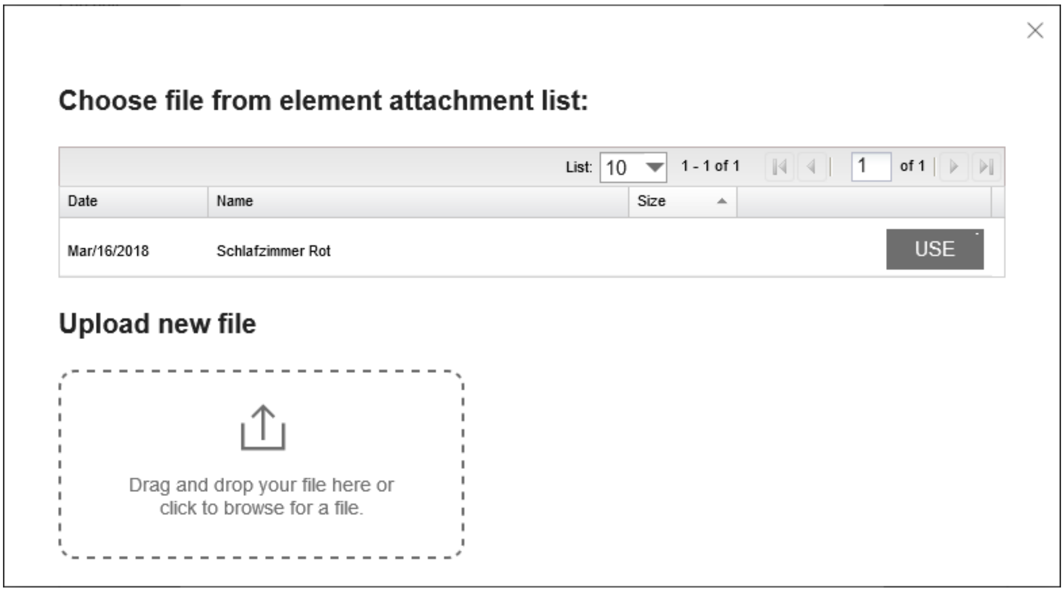
Insert HTML5 audio files

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

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. Click *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 infos* tab:

Function	Description
Orientation	Select the alignment of the audio player in the display: • *Center*: The audio player will be centered. Text cannot flow around the audio player. • *Left*: The audio player will be aligned left. If space is available, text will flow around the audio player. • *Right*: The audio player will be aligned right. If space is available, text will flow around the audio player. • *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.

4.8 Budget data

The following budget data is used in the Marketing Planner:

Name	Description
Committed	Budget data of the *Committed* type is calculated from the respective sum of the values of the standard orders, the remaining values of the blanket orders and the values of the call orders. Note that you manage the POs in the detailed view of an element. For more information, see Chapter 4.8.1
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

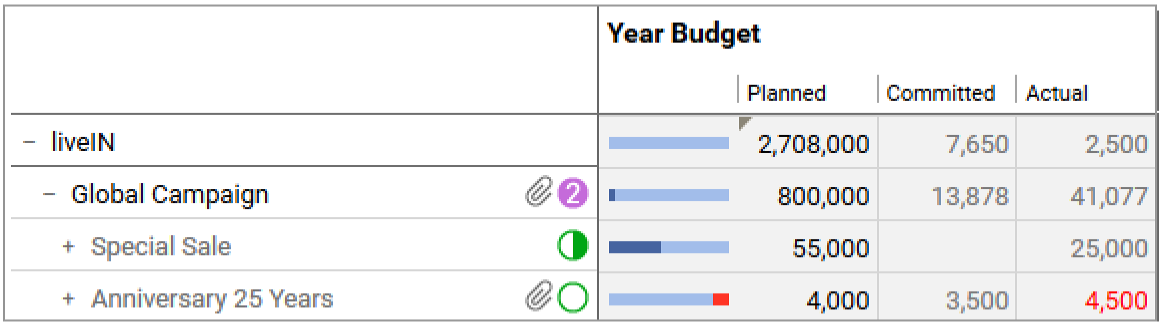
You can also create customer-specific budget calculations and display them in their own columns in the budget view. For more information, see chapter 4.9.

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 7.13 for information about creating fees and Chapter 4.1 for information about using fees.

Displaying the budget utilization

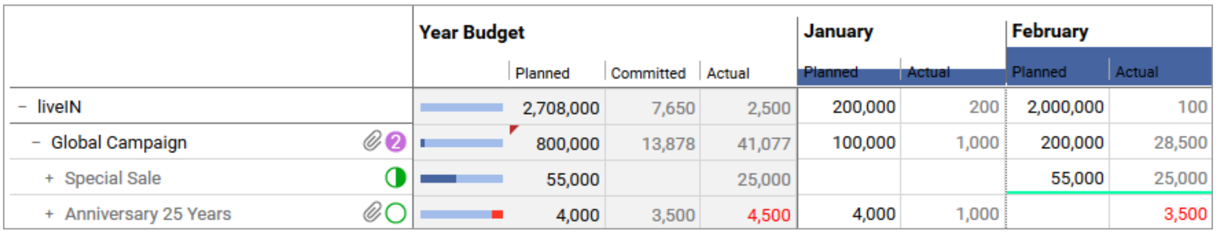
The budget utilization is displayed as follows:

- 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 € 250 € 700	closed
PO B	€ 1600	€ 900 € 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 budget:	*€ 7000*	

4.8.1 POs

POs represent the situation where a service has been ordered but not yet paid for. The financial resources for this are correspondingly committed, but not yet spent.

PO types

You define the type when creating a PO. You can choose between standard order, blanket order and call order:

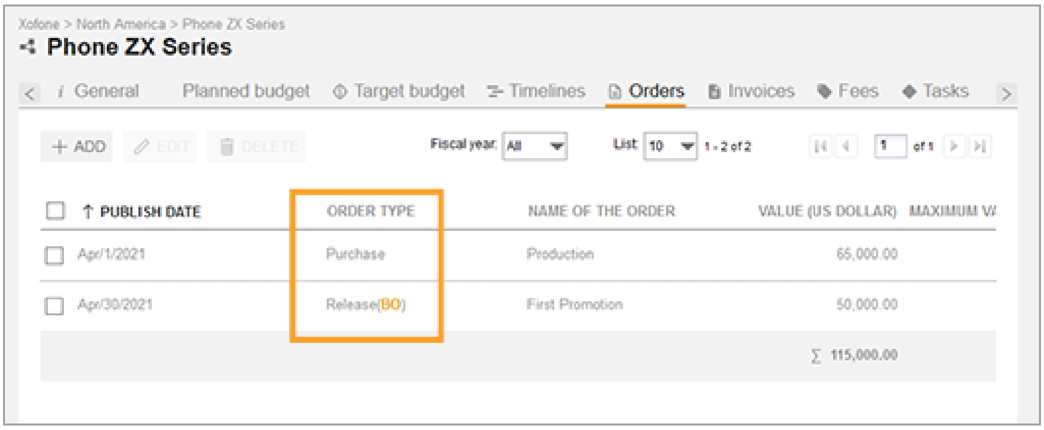
- *Standard orders*: A standard order is a self-contained unit; there is no dependency on other orders.
- *Blanket orders*: With blanket orders, Marketing buys a large package of services without knowing when or how they will be used within the organization. An example is airtime for commercials at a TV station, which is purchased once a year to get better prices.
- *Call orders*: When it is clear how the resources purchased with the blanket order will be used, a call order is created to use money from that blanket order. The remaining value of the blanket order is then reduced by the amount used for the call order.

Relationship between blanket orders and call orders

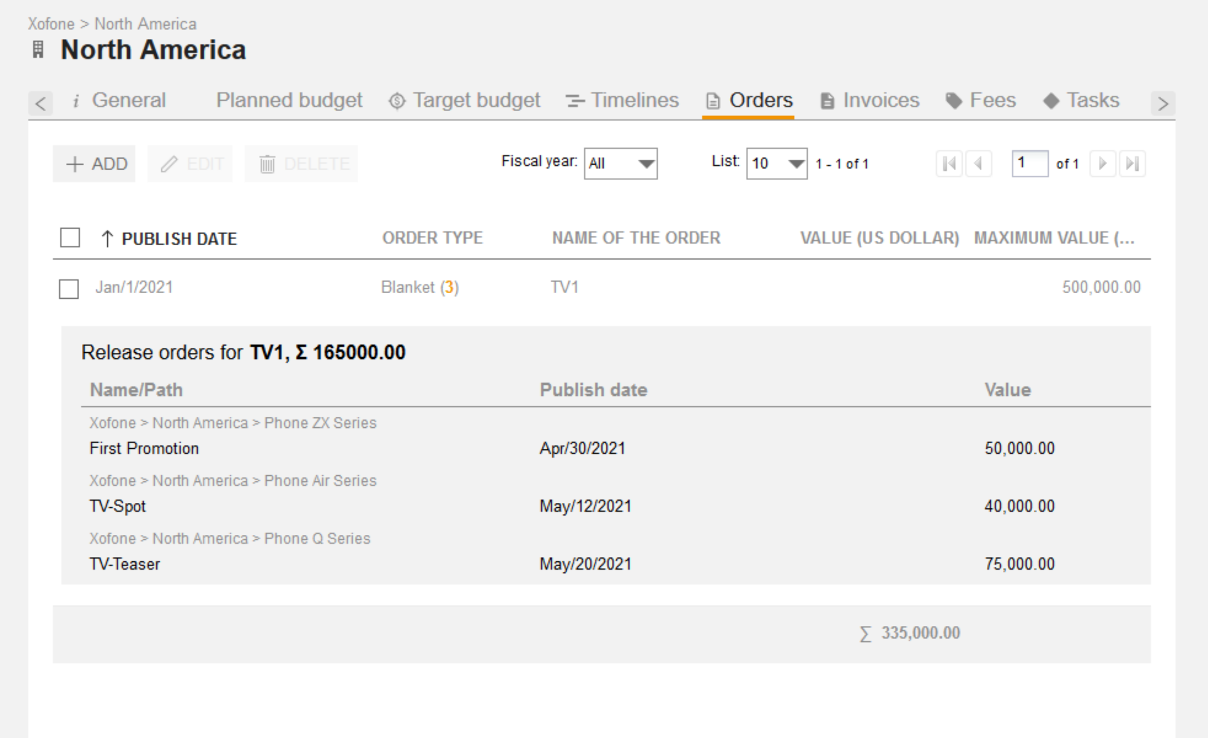
The blanket order must be created for the same or a parent element that is in a direct path to the element where the call order is created. Another condition is that the elements of the blanket order and the associated call orders must have the same working currency.

Display in the detailed view

All order types are displayed in the detailed view on the *Orders* tab:



For blanket orders, the number of assigned call orders is displayed in parentheses. Clicking on the number opens a list showing details of the call orders:



Export and import

Orders of any type can be exported. Import is possible for standard and call orders. For details, refer to the Chapter 6.2.

The properties of an order

The following table displays the properties of a standard order.
Blanket orders have the same data as standard orders with one exception: instead of entering the value, the maximum value is entered for a blanket order and the remaining value is calculated. The remaining value is calculated as the maximum value minus any assigned call orders.
Call orders also have the same data as standard orders with one exception: A call order must always be assigned to a blanket 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].
Value (in working currency)	Define 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.
Publication 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. The publication date of a created blanket agreement with assigned call orders must not be outside the runtime of the planning element.

Property	Description
Engagement 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.
Cost center	Define the cost center to which the estimate is to be posted.
Cost type	Enter the cost type according to which the PO is to be categorized. You can enter text freely or select an entry that has already been made.
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.

4.8.1.1 Entering an order

1. Open the detailed view of the element to which you want to add a PO.
2. Go to the *POs* tab.
3. Click *Add*.

The *Add PO* dialog box opens.

4. Enter the name of the PO.
5. Specify what type of order it is: *Standard*, *Blanket* or *Call*.
6. If you are creating a call order: Select the associated blanket order.
7. Enter the value. If it is a blanket order, enter the maximum value of the blanket order.
8. Set the publication date.
9. If necessary, enter more properties.
10. Click *Save* to confirm your entries.

The order has been created. The entered value is automatically entered in the corresponding cells of the *Committed* columns, where the publication date determines the annual budget and the monthly budget. If there are several orders set in the same time period, the individual values are added together.

4.8.1.2 Edit PO

> **Note**
>
> The PO type cannot be edited. If you want to change the type of a PO, delete the PO and create a new PO with the desired type.

1. Open the detailed view of the element whose order you want to edit.
2. Go to the *POs* tab.
3. Open the PO:
    a. Double click the PO.

or

    a. Activate the checkbox in the first column.
    b. Click *Edit*.

The *Edit PO* dialog box is displayed.

4. Change the properties.
5. Click *Save* to confirm your entries.

The PO is saved with the changed properties.

4.8.1.3 Delete PO

Note

Blanket orders cannot be deleted as long as at least one call order is assigned. Before deleting, all assignments of call orders must be deleted.

1. Open the detailed view of the element whose order you want to delete.
2. Go to the *POs* tab.
3. Activate the checkbox in the first column.
4. Click *Delete*.

A confirmation prompt is displayed.

5. Click *OK*.

The PO has been deleted.

4.8.2 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 plan `40,000 euro` for the `Corporate communication` and `75,000 euro` for `Product campaigns`. In the Corporate Communication area, the budget is distributed between the months `January (20,000 euro)`, `February` (`10,000 euro`) and `March`(`5,000 euro`). You have received invoices for promotions that have been carried out amounting to `7,500` euro 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. Click *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 annual 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 marketing development funds on Page 116. Once you have requested the MDF, you go back to the *Invoices* tab and can continue with step 6.

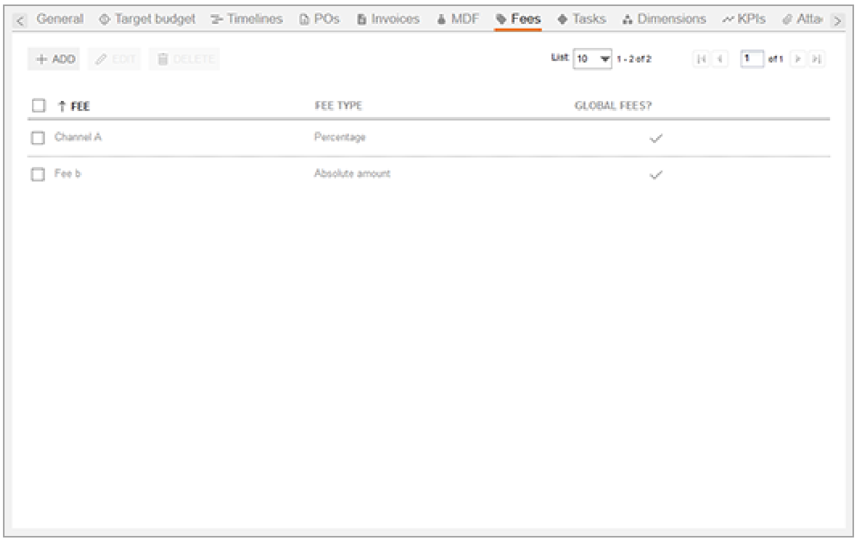
Editable properties of an invoice

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.
Publication date	Enter the invoice date.
Payment status	Activate the checkbox if the invoice is paid.
Engagement number	Enter the job number.
Reference number	Enter the reference number.
Invoice number	Enter the invoice number.
Cost center	Enter the cost center.
Cost type	Enter the cost type according to which the invoice is to be categorized. You can enter text freely or select an entry that has already been made.
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. Users with access to the *Attachments* tab can download the files by clicking them in the *Attachments* column.

4.8.3 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 4.9).

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 6.2).

Associated tasks

- Assigning a fee to an element (see chapter 4.8.3.1)
- Editing a fee amount for an element (see chapter 4.8.3.2)
- Deleting a fee assignment (see chapter 0)

4.8.3.1 Assigning a fee to an element

1. Click *> 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. Click *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.

4.8.3.2 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. Click *> 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.

4.8.3.3 *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. Click > *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. Click *Delete*.

A confirmation prompt is displayed.

6. Click *OK*.

You have deleted the fee assignment.

4.8.4 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 117). This user processes the request (see Processing a request for marketing development funds Page 117). The approved funds are displayed in the *MDF* budget column (see Schematic yearly and monthly view Page 24). MDF amounts can be approved up to a maximum of 99,999,999.99 (of the corresponding currency).

4.8.4.1 Requesting a market development fund

Prerequisites

The current year must be created so that your request can be dated with the current date. A year is considered created if it can be selected from the *Year* drop-down list in the calendar or in the budget view. Please note that the current year does not have to be selected so that you can issue a market development fund request. If necessary, you can also issue a market development fund MDF request in a different year; however, the request will always be dated with the current date.

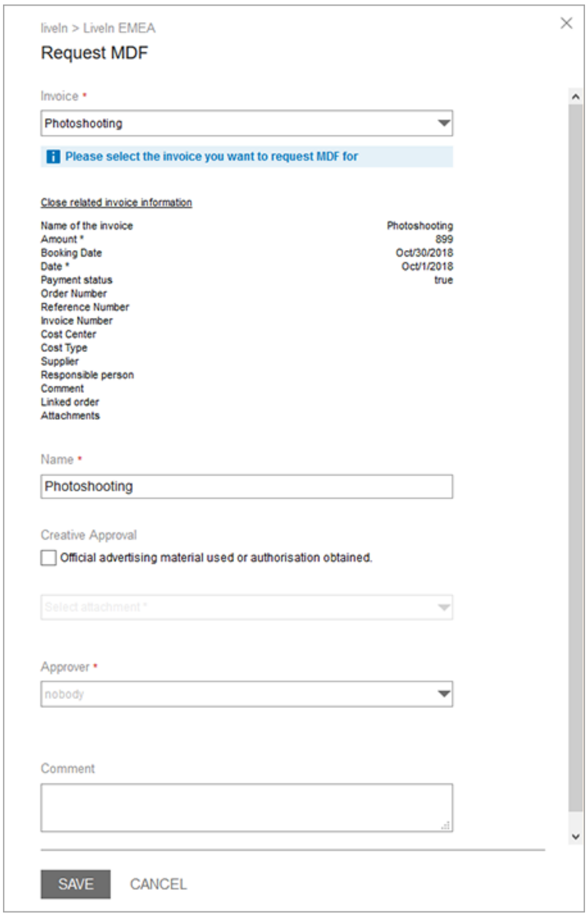
Step by step

1. Open the detailed 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 detailed 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.



4.8.4.2 Processing a request for a market development fund

Prerequisites

You have been entered as an approver (see *Entering a user as an approver* Page 183).

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 requester is informed that the request is processed by e-mail. Processed market development funds are listed under > *Approvals > Completed MDF requests*.

If you click *Details* in the list of the MDF requests in the *Action* column, you go directly to the input screen of the request.

If there are several attachments attached to the application, you can download all attachments in one ZIP file using 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.

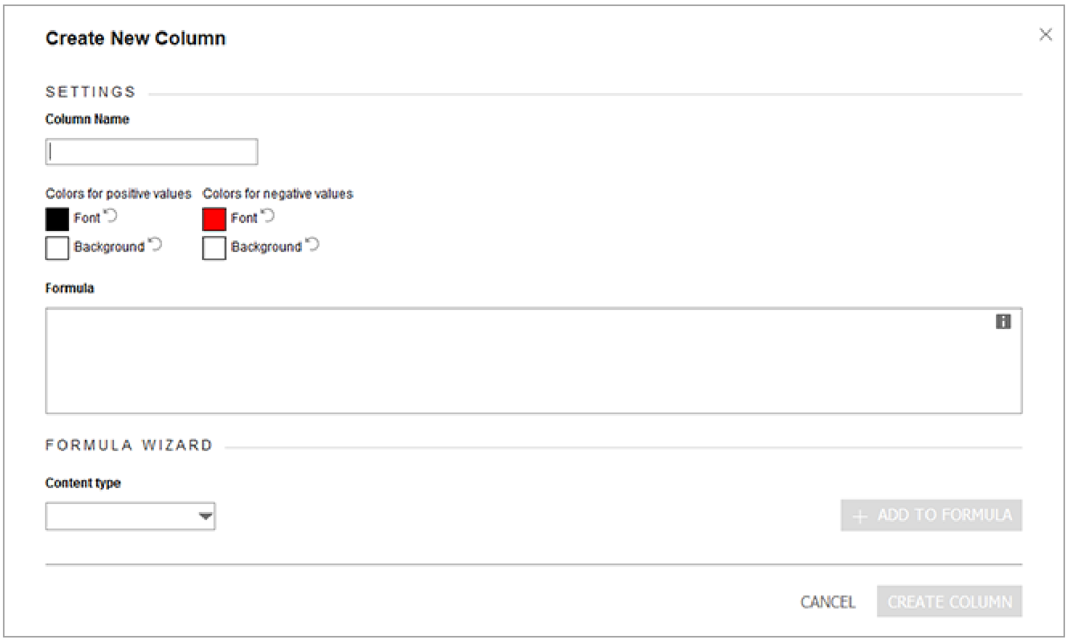
- Hiding/displaying columns: To change the displayed columns, move the cursor to the header of the table. An arrow is displayed on the right-hand side of the cell. Click the arrow and choose *Columns*. Activate or deactivate the checkboxes of the columns that you want to display or hide.
- Order of the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

4.9 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 budget, Residual Budget and MDF
- Fees (see chapter 4.1)
- Exchange rate (see Chapter 7.12)
- Numbers



Standard budget data, fees and exchange rates are specified on a time basis. Note for planned budgets that the total value of a period is always used, i.e. the initial planned budget with all planned budget adjustments. Additionally, it is possible to compare budget data from different years. You can choose whether budget data from a specific year or from the selected one is used. This makes it possible, for example, to compare plan data from different years.
For standard budget values, you choose whether the value used in the calculation is the sum of all child elements.

For exchange rates, you also specify the currency - based on the reference currency - to which the rate should be displayed. If no exchange rate has been defined for the selected currency or time period, then the variable has the value 0.

Of course, you can also include custom budget calculations in a budget export (see chapter 5.1).

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

Example: Net 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 4.9.1.

Note: a prerequisite for displaying the fees correctly is that an administrator must have created them (see chapter 7.13). Furthermore, the fees must be assigned to the elements (see chapter 4.8.3.1) and the planned budget must be entered for the planning elements.

Associated tasks

- Creating custom budget calculations, see Chapter 4.9.1
- Editing custom budget calculations, see Chapter 4.9.2
- Publishing custom budget calculations, see Chapter 4.9.3)
- Deleting custom budget calculations, see Chapter 4.9.4

4.9.1 Creating custom budget calculations

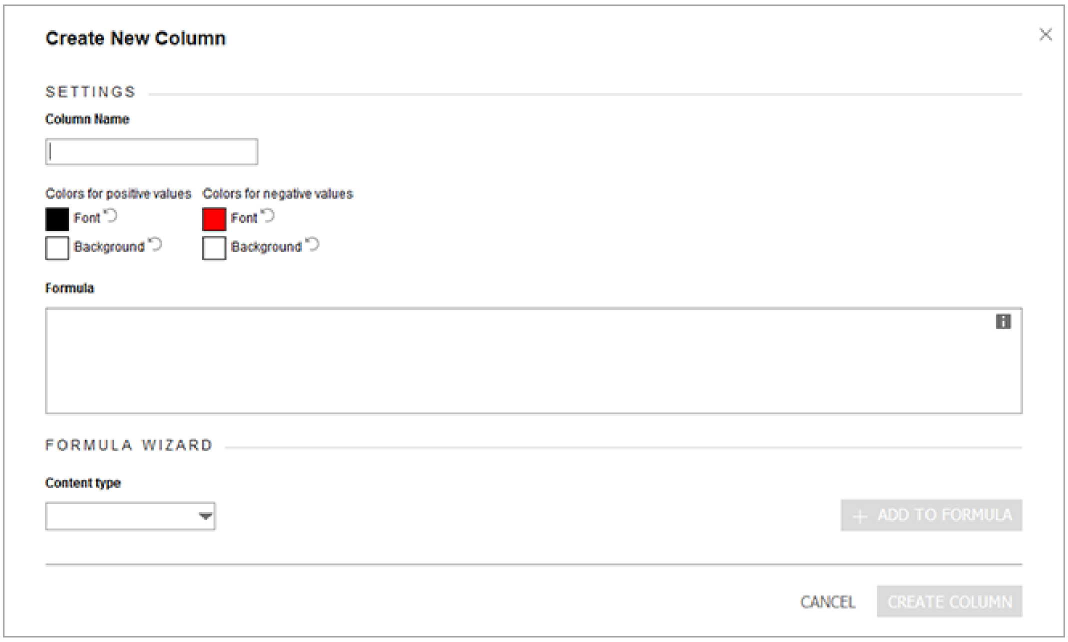
You want to calculate the net planned budget for the month of January. The formula for the calculation is the same as the example in Chapter 4.9: $B_{Net} = B_{Planned} - (B_{Planned} * F_{\%} + F_{abs} /(1 + F_{abs}))$

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 *January*entry.
   d. In the *Year* dropdown list, select the *Displayed year* entry.
   e. If you want to use the total of the child elements for the parent element, activate the checkbox *Sum of all children*.
   f. Click *Add to formula*.

The <Budget - Planned - January–(Displayed year)> entry is added in the *Formula* field.

5. Enter the characters "- (" after the entry.
6. Add the <Budget - Planned - January–(Displayed year)> entry again. Alternatively, copy the <Budget - Planned - January–(Displayed year)>entry 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 *Fee* entry.
   b. In the *Fee* dropdown list, select the *Rate of percentage fee* entry.
   c. In the *Period* dropdown list, select the *January* entry.
   d. Click *Add to formula*.

The <Fee - Rate of percentage fee - January> entry 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 *Fee* entry.
    b. In the *Fee* dropdown list select the *Sum of absolute value fees* entry.
    c. In the *Period* dropdown list, select the *January* entry.
    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 - (Displayed year)>-(<Budget - Planned - January- (Displayed year)>*<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.

4.9.2 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.

4.9.3 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 4.1.

4.9.4 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 Measuring and reporting

5.1 Measuring targets achieved using KPIs

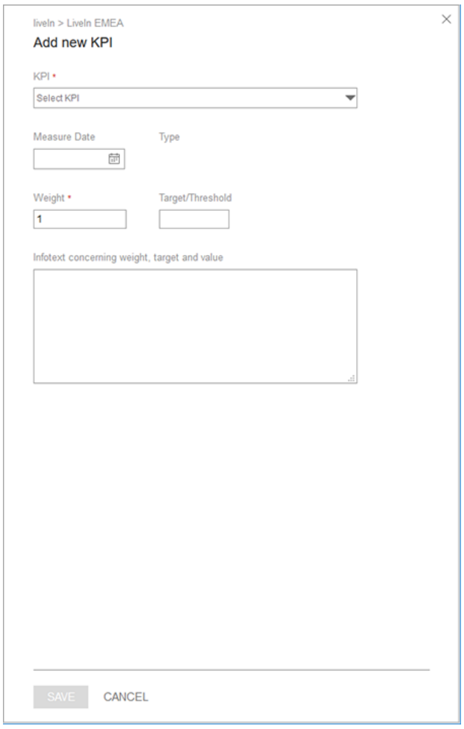
You can assign KPIs or a KPI set to an element to rate the extent to which targets have been achieved or the success of the measures. The lead conversion rate shows what percentage of the total visitors to a website have carried out a specific action (for example, made a purchase or an inquiry). You can depict the results of the KPIs that you use in charts using the Marketing Planner reporting functions.

5.1.1 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. Click *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.

5.1.2 Adding a KPI set

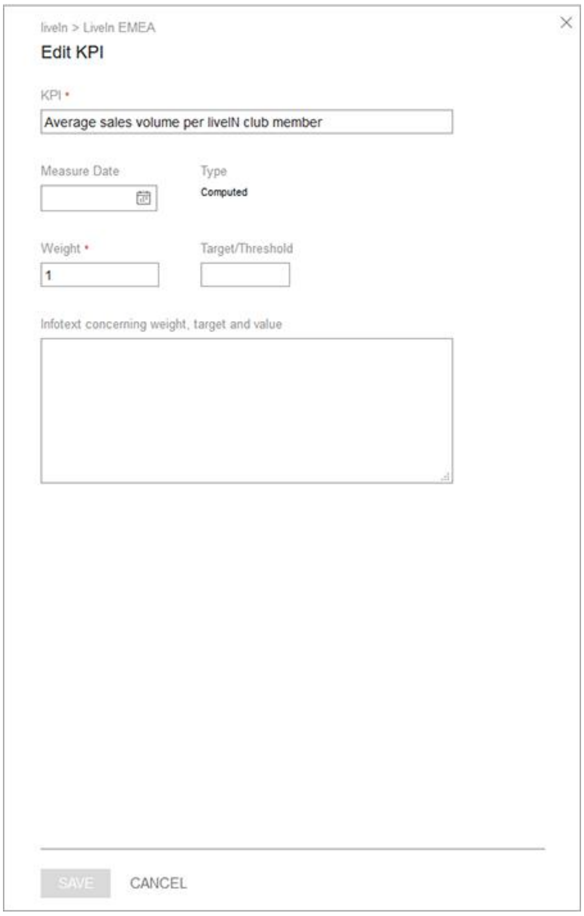
You can use a KPI set to group together multiple KPIs so that all the KPIs required to evaluate a marketing measure can be assigned to a planning element simultaneously.

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 detailed view closes. You have assigned a KPI set to the selected planning element.

5.2 Exporting the status of the budget

Use this export function if you want to export only planned budgets and receive an update of the current status of different budget values, e.g. planned compared to actual status. 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. Click > *Marketing Planner* > *Budget*.
2. In the budget view, select the year whose budget you want to export.
3. For the year view in which you want to get the values, select *Month*.
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. Click .

This opens the *Export planning* dialog 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 dropdown list 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, activate the *Include markers* checkbox.
12. From the bottom dropdown list 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.

5.3 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.

5.4 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 dropdown list 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. Select the *Highlight changes to time periods, tasks and markers* checkbox to highlight the planning elements changed accordingly within a certain time period 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, activate the *Include markers* checkbox.
9. From the bottom dropdown list 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.

5.5 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.

5.5.1 Project budgets report type

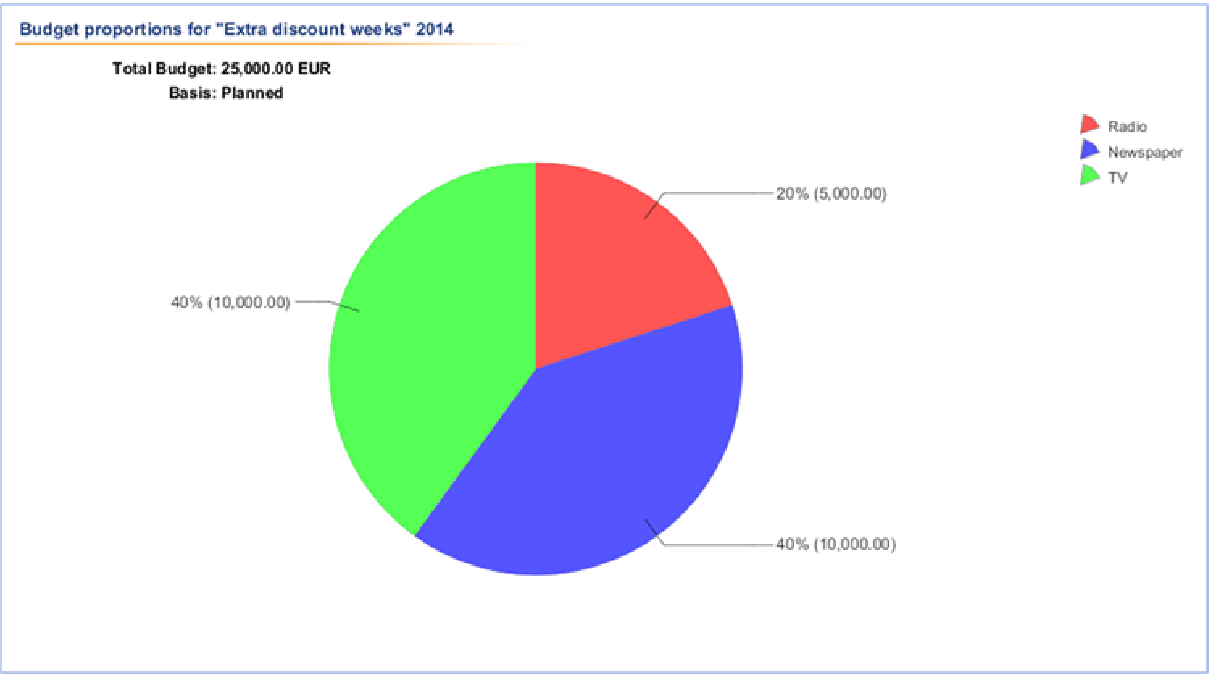
You require a pie chart to display the distribution of the budget for a project between its related measures or areas. You want to generate the evaluation based on both the planned and the actual values. You also require a yearly, monthly, and quarterly overview for the evaluation.

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.



5.5.2 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.

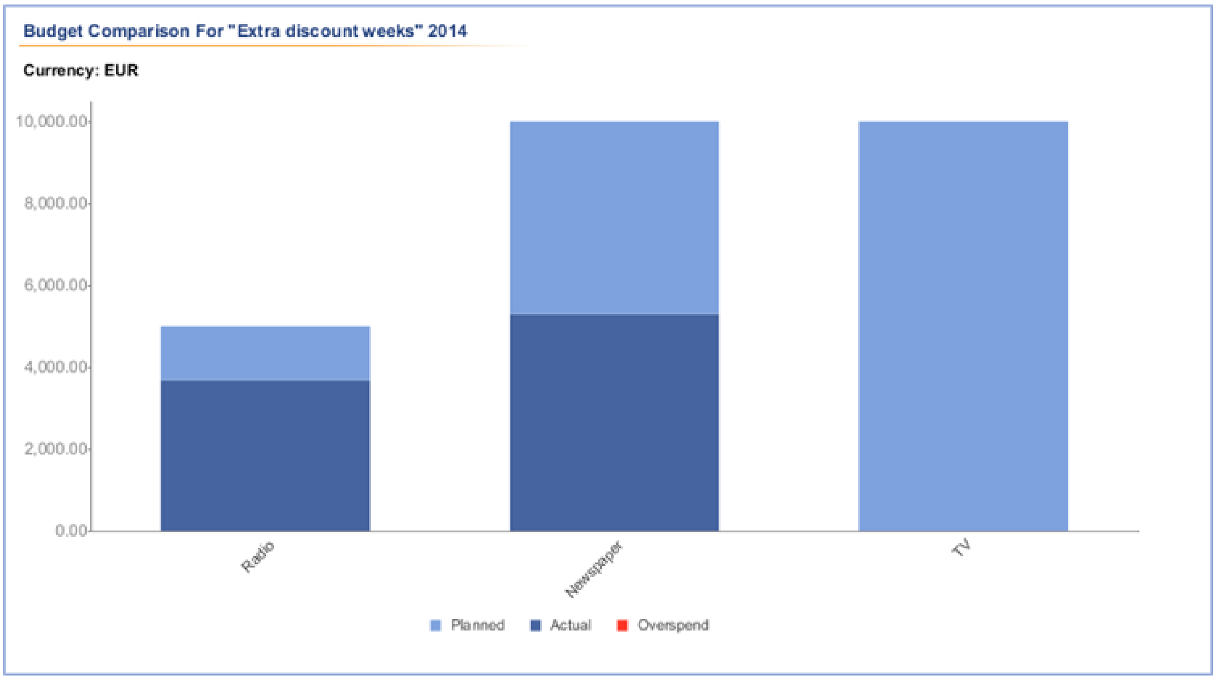
1. Select the *Budget Planned/Actual Comparison* report type.
2. Select the year of the marketing plan from the dropdown list.

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.

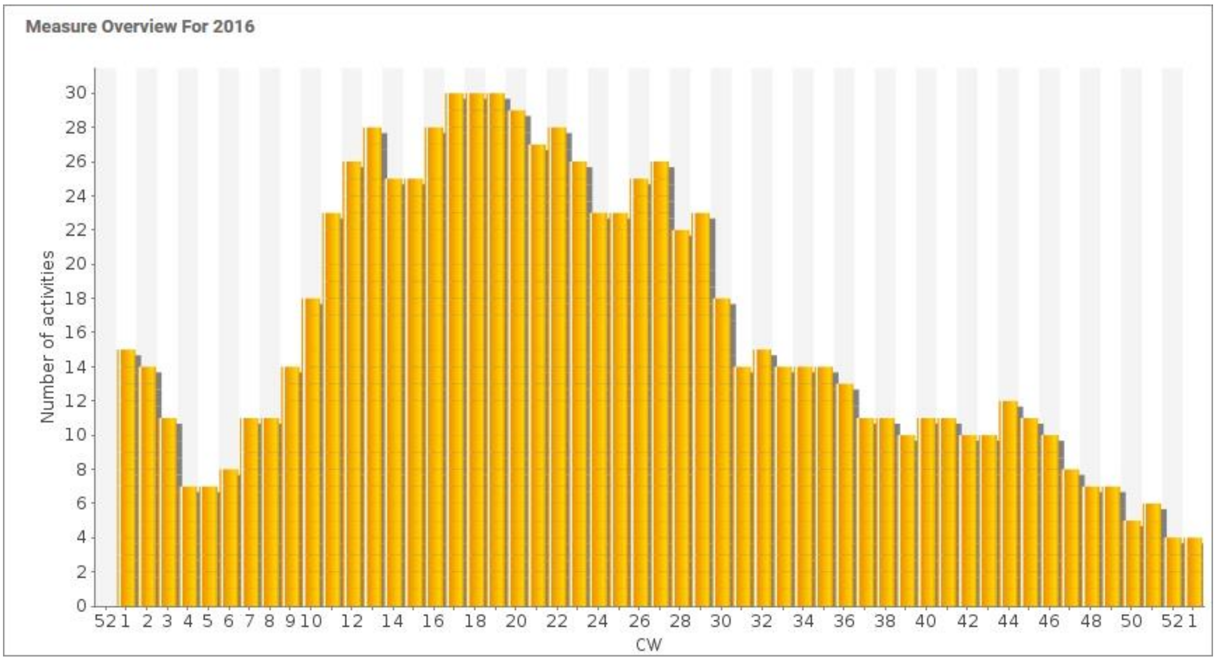


5.5.3 Measure Overview report type

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.



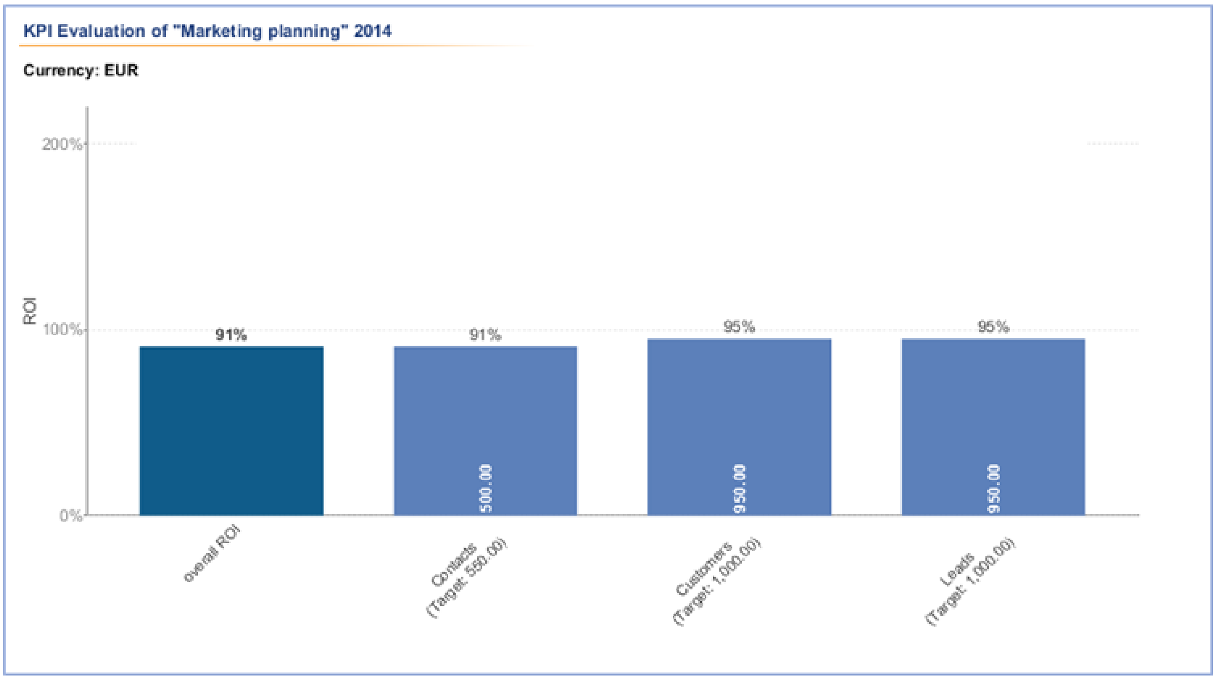
5.5.4 KPI evaluation report type

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.



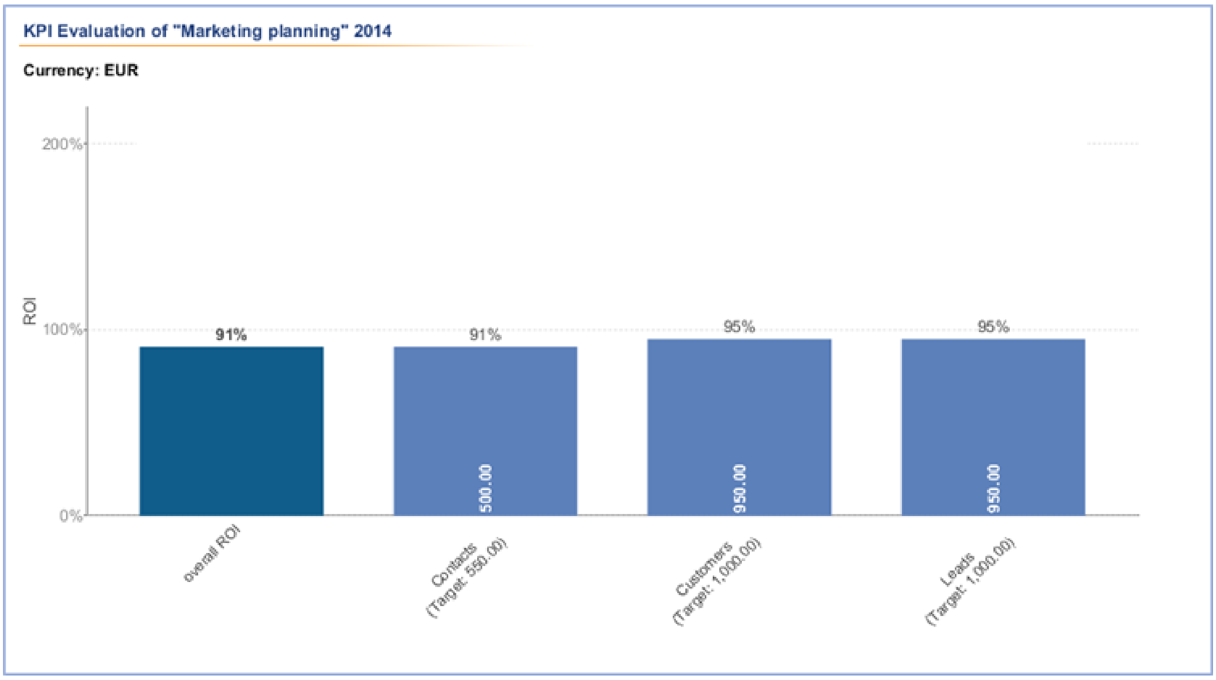
5.5.5 KPI comparison report type

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 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.



5.5.6 KPI benchmarks report type

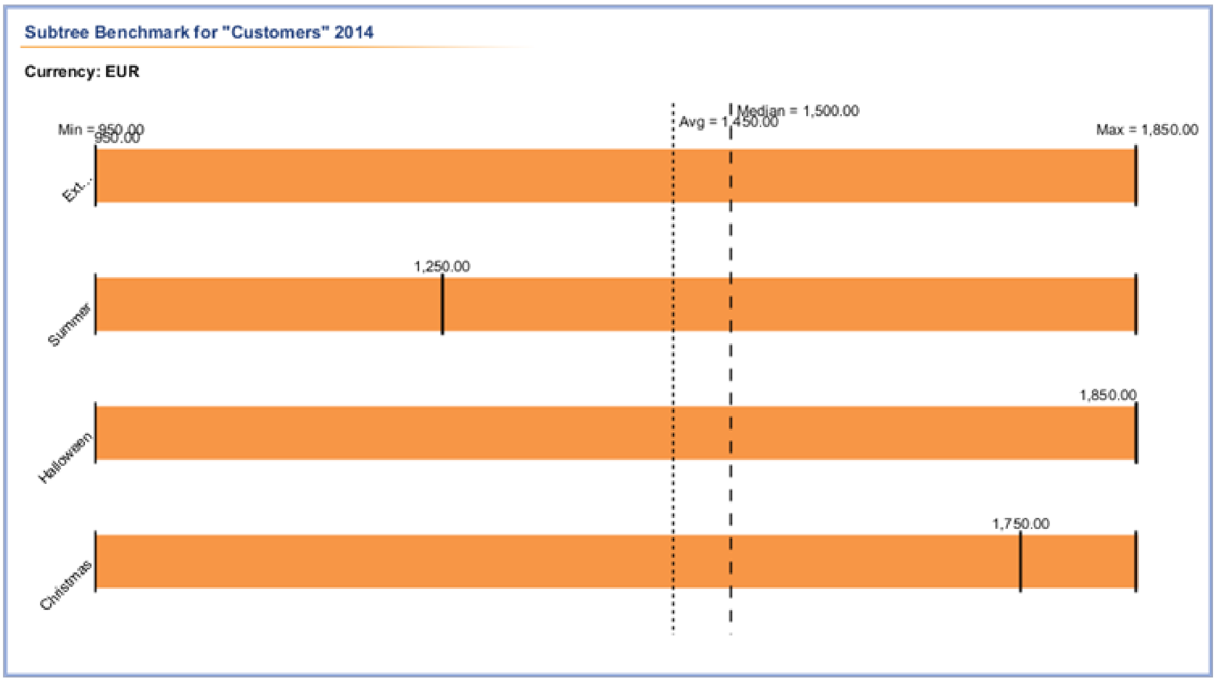
You require a bar chart that displays the minimum, maximum, and mean KPI values of the selected element of your marketing plan. You also want to generate the report based both on the values of the selected dimensions and on the sub-elements of the selected element.

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.

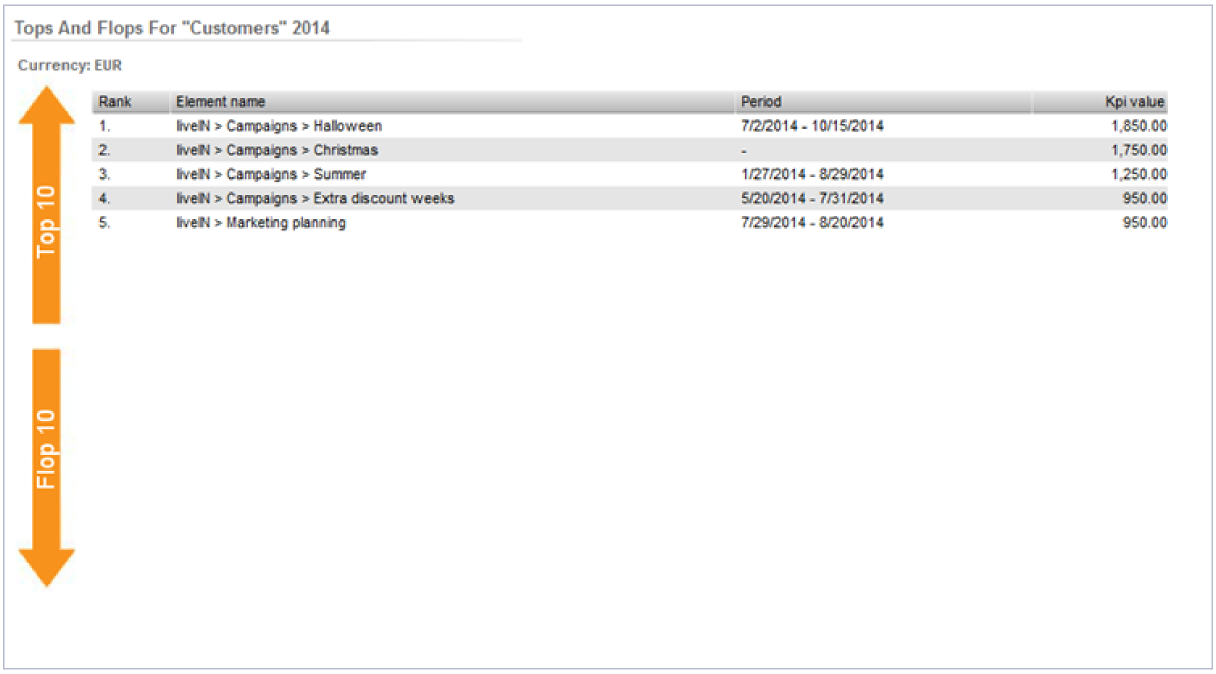


5.5.7 Tops and Flops report type

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

5.5.8 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).

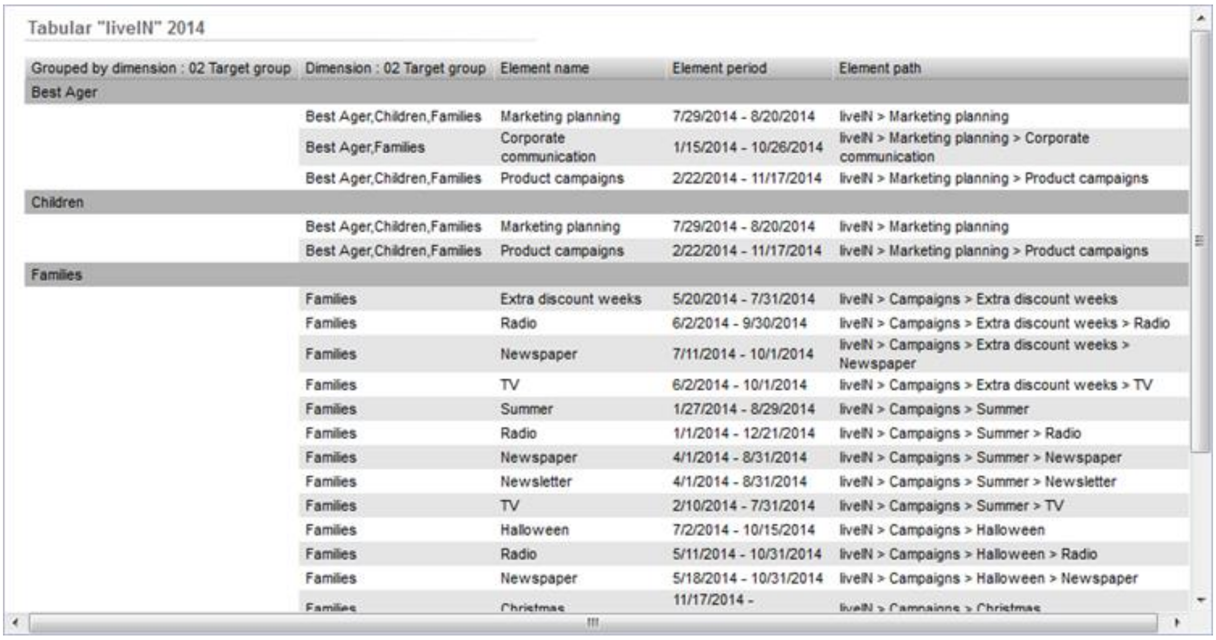
Prerequisites

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 *Saved sets* area or click *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 *Include 0-rated selections* checkbox 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

6 Main Functions

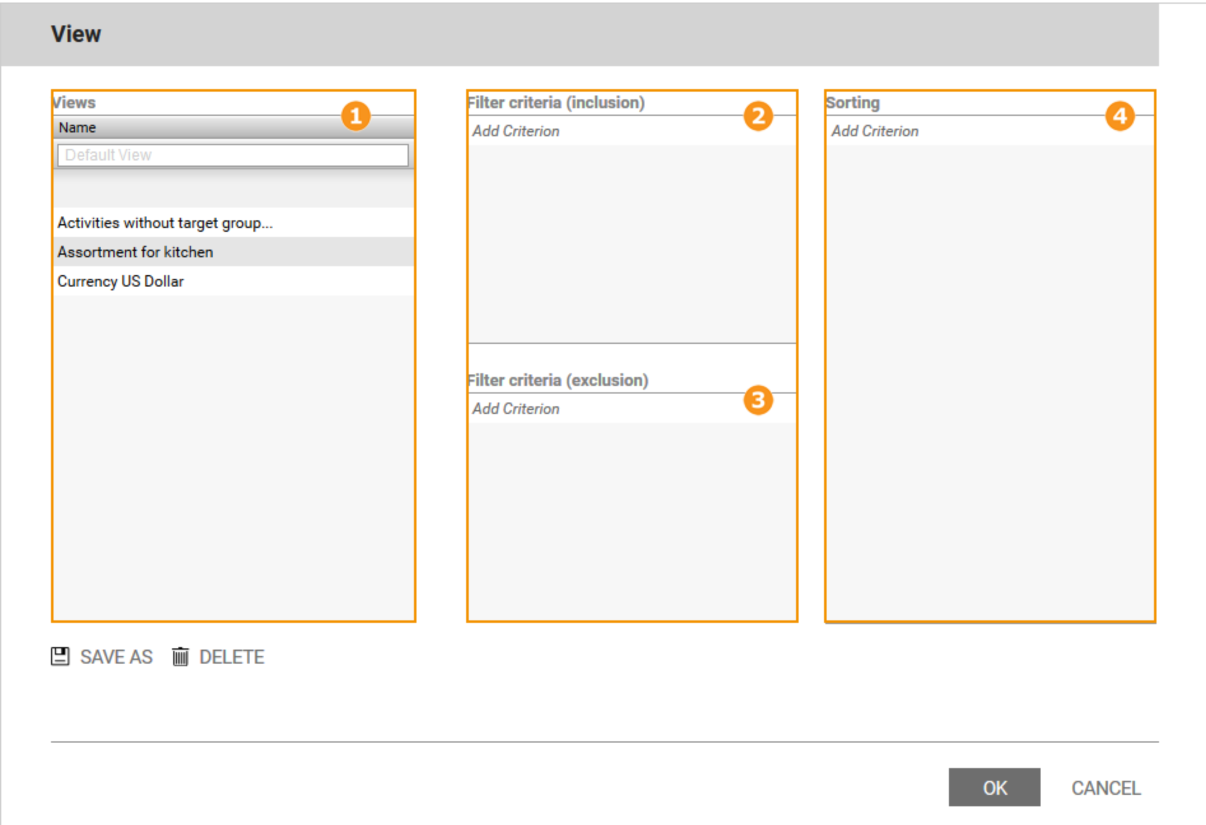
6.1 Filtering and sorting elements

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:



Section	Description
1 Views	This area lists the saved views. You can also provide a name for a saved view.

Section	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. For more information about the available criteria, see *Criteria for filters and sorting* on Page 144.
4 Sorting criteria	In the right-hand area of the dialog box, you enter the sorting criteria. For more information about the available criteria, see *Criteria for filters and sorting* on Page 144.

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 150.

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

When 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.

6.1.1 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.
Fees	You filter the view by one or more charges 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*.

6.1.2 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 `Branch` and `Target Group`, 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 (`target group`, for example) that you want to use as filter criteria.

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.

6.1.3 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 `Branch`, 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.

6.1.4 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.

6.1.5 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* icon 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. Click *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.

6.1.6 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 *Subtree* entry 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.

6.1.7 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.

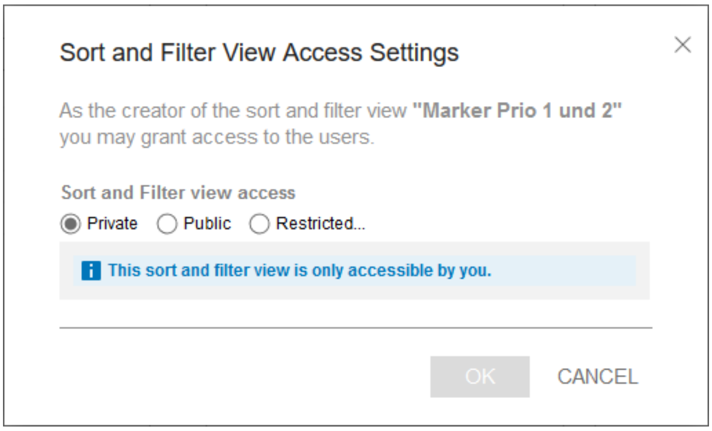
> **Note:** Views with restricted or fully public visibility require a name that is unique throughout the system.

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. Click *OK*.

The *Sort and Filter View Access Settings* dialog box closes.

9. Click *Save*.

The access settings have been saved.

10. Click *OK*.

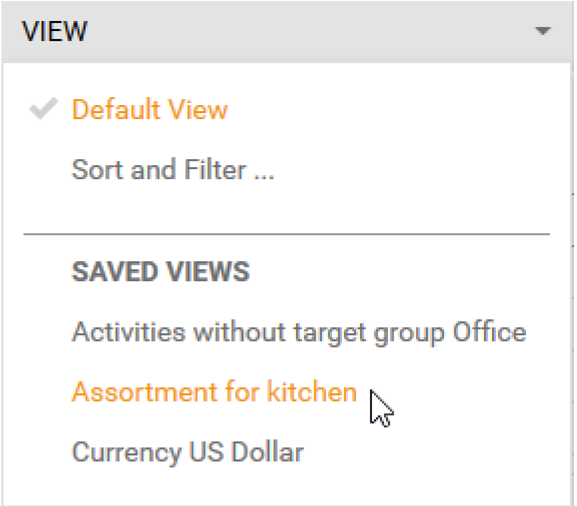
The *View* dialog box closes. The view is saved under the name provided and can be used but not changed by the selected group of people.

6.1.8 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.

6.1.9 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. Click *Delete*.
4. In the dialog box that opens, choose *Yes* to confirm the deletion of the view.

The saved view is deleted.

6.2 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 4.8
- For more information, see Chapter 2.3.1
- The currency of the budget data, see Chapter 4.8
- The budget scale, see Chapter 4.8
- The displays for the *Year view* and *Applied configuration* control elements, see Chapter 2.3.3

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* dropdown list and select *Edit 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.

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 7.12). 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 budget, Residual budget and *MDF*. You can also display 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	1150560
1:1000	1150
1:1000000	1
1:1000000000	0

Decimal places

You have the option to display budget data exactly with 2 decimal places or rounded with the *Display decimal places* setting.

Examples:

Setting activated	Setting deactivated
1566.99	1567
12356.12	12356
18542.50	18543
1500.00	1500

Associated tasks

- Creating a budget view (see chapter 0)
- Applying a budget view (see chapter 6.2.2)
- Editing a budget view (see chapter 6.2.3)
- Deleting a budget view (see chapter 6.2.4)

6.2.1 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. Click *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. Click *OK*.
8. In the dropdown list, 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. Specify 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 dropdown list.

6.2.2 Applying a budget view

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

The dropdown list opens.

2. In the bottom area of the dropdown list, 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.

6.2.3 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 dropdown list, select the view that you want to edit.
3. Optional: If you want to change the name, click the pencil icon next to the dropdown list.

The *Budget View Name* dialog box opens.

4. Change the name of the view.
5. Click *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. Click *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 *Activate 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.

6.2.4 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 dropdown list, select the view that you want to delete.
3. Click the recycle bin icon to the right of the dropdown list.

A confirmation prompt is displayed.

4. Click *Yes*.

The budget view is deleted.

6.3 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: Standard and call orders can only be exported.
- Fees
- Target budgets
- External IDs
- Planned budgets both as initial value and as planned budget adjustments

To learn which properties of invoices, POs, fees, target budgets, external IDs, and planned budgets can be imported and exported, see Chapter 6.3.1.

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 Chapter *Transferring an ID from a dimension* on Page 175.

> **Note**
>
> If you import the external ID, the assignment can only be done via 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.

6.3.1 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.

Note

Note that you can import the external ID for the elements first. But for the correct assignment, the ID must already exist.

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

Property	Description	Importable	Cell style for import
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)
Engagement 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
Cost center	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	—

Standard POs

The following table provides an overview of the properties of a standard order. All properties can be exported. Note the differences to the blanket and call orders in the following sections.

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
Publication 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
Engagement 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
Cost center	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	—
Residual budget	The residual budget of the element	No	—
Imported	This status indicates whether an order was imported.	No	—

Call order

The following properties can be exported and imported for call orders, as well as the same properties as for standard orders.

Property	Description	Importable	Cell style for import
Name of the associated blanket order	Name of the blanket order from which the value is retrieved.	Yes	Text
ID of the associated blanket order	ID of the blanket order from which the value is retrieved.	Yes, mandatory field	Number

Blanket orders

> **Note**
>
> The blanket orders can only be exported but not imported!

For blanket orders, the same properties can be exported as for standard orders except for the value. In addition, the following properties can be exported.

Property	Description	Importable	Cell style for import
PO ID	ID of the blanket order	No	Number
Maximum value	Value of the blanket order; call orders can be assigned up to this value.	No	Number
Remaining value	The remaining value is calculated as follows: Maximum value - (sum of the assigned call orders).	No	Number

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 budget

Property	Description	Importable	Cell style for import
Name	Name of the target budget	Yes	—
Value	Height of the Target budget	Yes, mandatory field	—

Property	Description	Importable	Cell style for import
Publication 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. Note that any initial planned budget and

Property	Description	Importable	Cell style for import
Annual budget	Planned budget for entire year		Number
Reference period	Defines whether the planned budget is an annual or monthly budget. The publication date defines year or month.	Monthly planned budgets: yes Annual planned budget: • Planning type *Top-Down*: yes • Planning type *Bottom-Up*: no	Text
Initial or adjusted	Specifies if it is an initial planned budget or planned budget adjustment.	Yes	Text

Property	Description	Importable	Cell style for import
Amount	Amount: In case of an initial planned budget, the total amount; in case of a planned budget adjustment, the delta.	Yes	Standard
Publication date	Assignment to a month and year	Yes	—
Creation date	Date of decision	Yes	—
Cost type	Specification of the cost type according to which the planned budget is to be categorized.	Yes	Text
Comment	Enter any additional information.	Yes	Text

6.3.2 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, standard orders, call orders, blanket orders, fees, target budgets or planned budgets in 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, orders and target budgets, you can select whether the export of the data 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, order, or target budget is included in an export depends on whether the *Publication date* property is in the time period considered.

It is not possible to export multiple years for the root element. You can export a complete year or a part of a year for the root element.

Planned budgets can only be exported for the full year selected in the budget view. For fees, the choice of a year is not relevant.

Associated task

- Exporting, see Chapter 6.3.2.2

6.3.2.1 *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.

6.3.2.2 *Export*

1. Click *> 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* dialog 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*, *Standard orders, call orders, blanket orders, fees* or *planned budgets*.
6. If you export invoices or orders: Select the time period you want to export, e.g. *2017* from *8/1* to 8/31.
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.

6.3.3 Import

The budget data import allows you to automatically import a large amount of budget-related data to the Marketing Planner. You import invoices, standard orders, call orders, fees, target budgets, external IDs or planned budgets collected in an Excel list.

Prerequisites for an error-free import

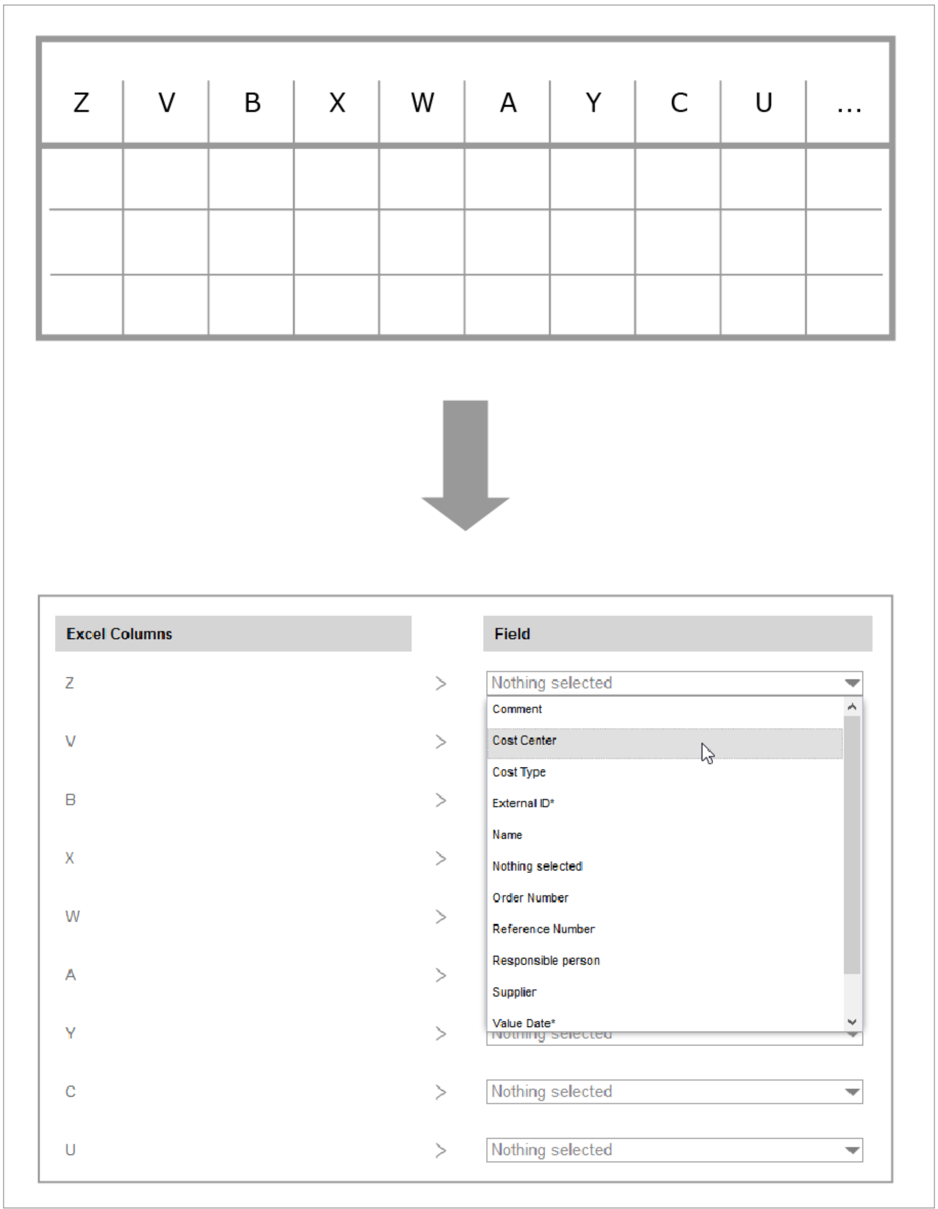
In order for an import to be successful, the following prerequisites must be met:

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 173.
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 6.3.1.

> **Note**
>
> If you require an Excel file with appropriately formatted columns, export the fields (see Exporting budget data on Page 166 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

Marketing Planner distinguishes between invoices, standard orders, call orders and target budgets whether they were created manually or by import.

Manually created invoices, standard orders, call orders and target budgets are not changed by an import. If you manually modify an imported invoice, standard order, call order, or target budget, the invoice, standard order, call order, or target budget is marked as manually created. This is also the case if you request a market development fund for an imported invoice. The invoice or standard order, call order or the target budget can then no longer be deleted or overwritten by an import.

Delta and full upload

When importing invoices, standard orders, call orders, planned budgets, 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, for example, you want to add new invoices, standard orders, call orders, planned budgets, target budgets or external IDs to the elements at regular intervals. The import file must therefore contain a differential level.
  In this case, invoices, standard orders, call orders, planned budgets, target budgets or external IDs that have already been imported will not be overwritten and will be permanently marked as manually created. This means that you can no longer completely overwrite already created invoices, standard orders, call orders, planned budgets, target budgets and external IDs by importing them.
- *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. Consequently, an import must not contain only a difference status for a planning element, but must contain all data to be imported for an element.

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.

Assigned to years

For invoices, standard orders, call orders, target budgets and planned budgets, you also decide for which year data is imported. For planned budgets, you must always specify a year.

For invoices, standard orders, call orders, and target budgets, you have two options:

- You import all of the objects contained in a file in one overall import. In this case, all invoices, standard orders, call orders and target budgets are imported. The records are assigned to the different years based on the publication date.
- You import the objects whose publication date matches the year you selected. 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

- *Importing* on Page 173

6.3.3.1 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. There cannot be any empty 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 Publication date.
- Standard orders and target budgets: In addition to the ID, the file must contain filled columns for the mandatory fields *Value* and *Publication date*.
- Call orders: In addition to the ID, the file must contain filled columns for the mandatory fields *ValuePublication date* as well as *ID of the associated blanket order*.
- 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

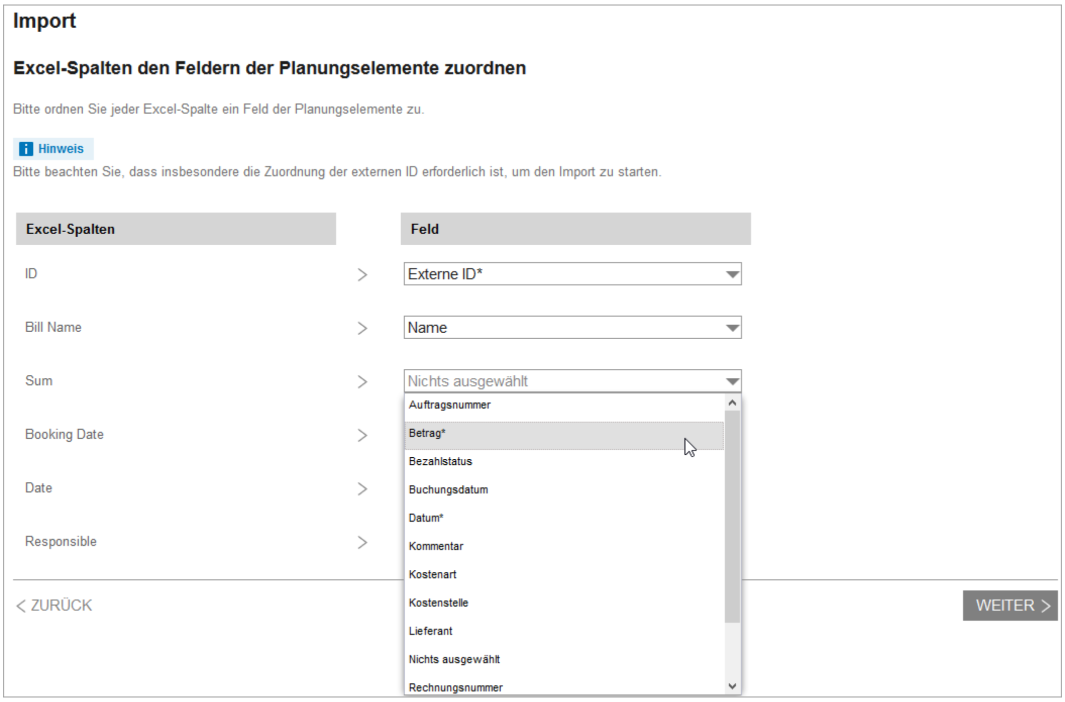
	A	B	C	D	E	F
1	**ID**	**Bill Name**	**Sum**	**Booking Date**	**Date**	**Responsible**
2	bbb1234	Order broschures	500	19.05.2015	28.05.2015	John Doe
3	bbb1235	Photoshooting	2500	20.05.2015	28.05.2015	Max Mustermann
4	bbb1235	Layout	1599	23.05.2015	30.05.2015	Jane Public
5	bbb1236	Order Leaflets	450	21.05.2015	29.05.2015	Max Mustermann

6.3.3.2 Import

1. Click > *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, standard orders, call orders, target budgets, external ID, fees*, or *planned*.
4. If you import invoices, standard orders, call orders, target budgets or planned budgets: In the *Year* field, enter the year for which the data is being imported. For invoices, standard orders, call orders, and target budgets, select Total Import if invoices, standard orders, call orders, and target budgets from all years are imported.
5. Drag and drop your file to the *Excel file* section or click to search for files.
6. Click *Next*.

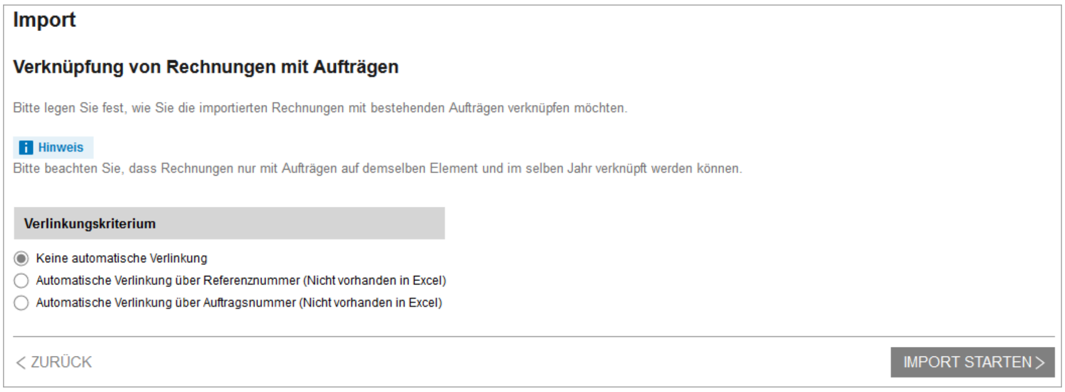
You now go to the second step of the import. All columns of the Excel file are listed here.

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:

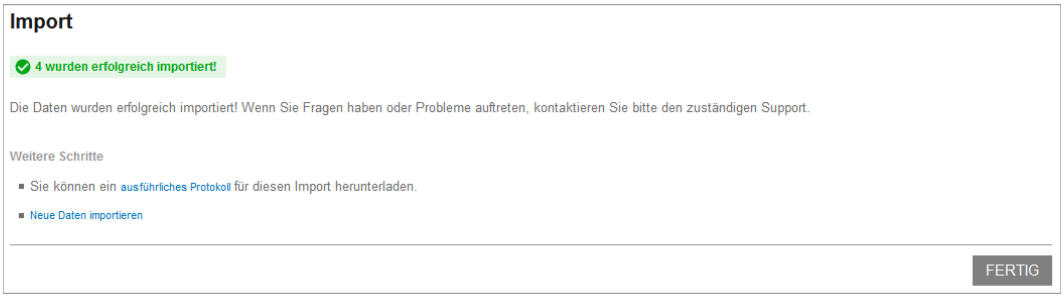
   - Link using reference number
   - Link using order number

   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.



6.3.4 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. Click > *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, select 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.

7 Administration

7.1 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 7.3 to 7.9 as well as 7.11 to 7.13. The only exception is the page under > *Budget & Calendar* > *Settings* > *Dimensions*. (See Chapter 7.10).

7.2 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

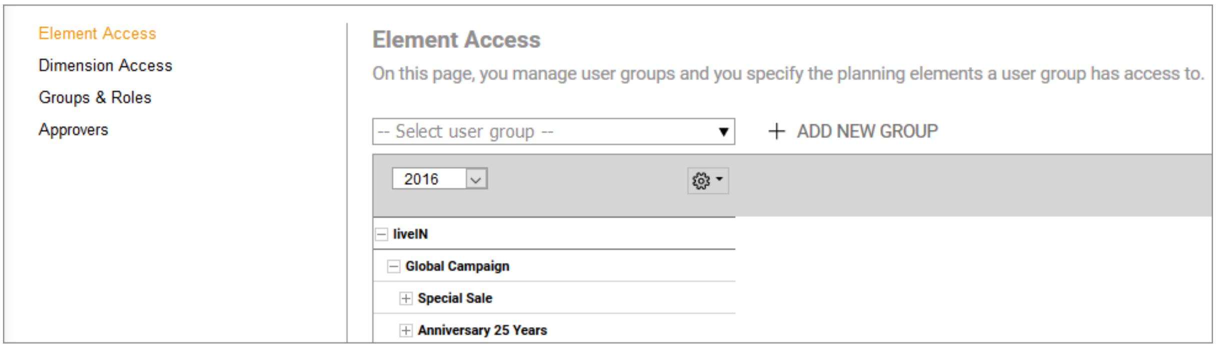
7.2.1 Creating a user group

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*.

7.2.2 Defining access to elements and dimensions

You have created the user group `Branch – South`, for example, and want to approve individual planning elements and individual 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. Select *Branch South* via `Select user groups`.

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 `Branch – South` user group 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 restricted 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 `Branch – South` 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*, choose `Branch – South`.

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 `Branch – South` user group can access.

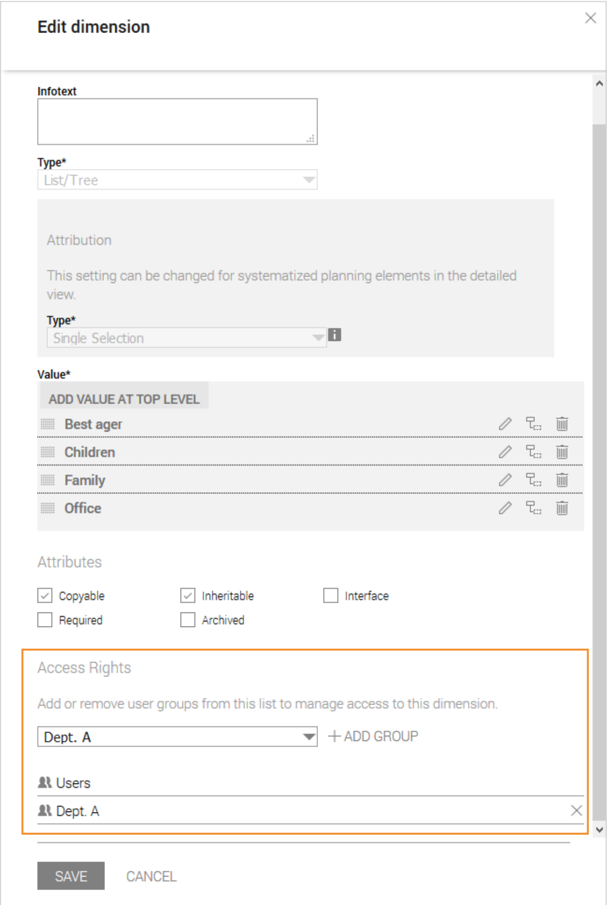
Defining access to a dimension for multiple user groups

1. Click > *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.



7.2.3 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

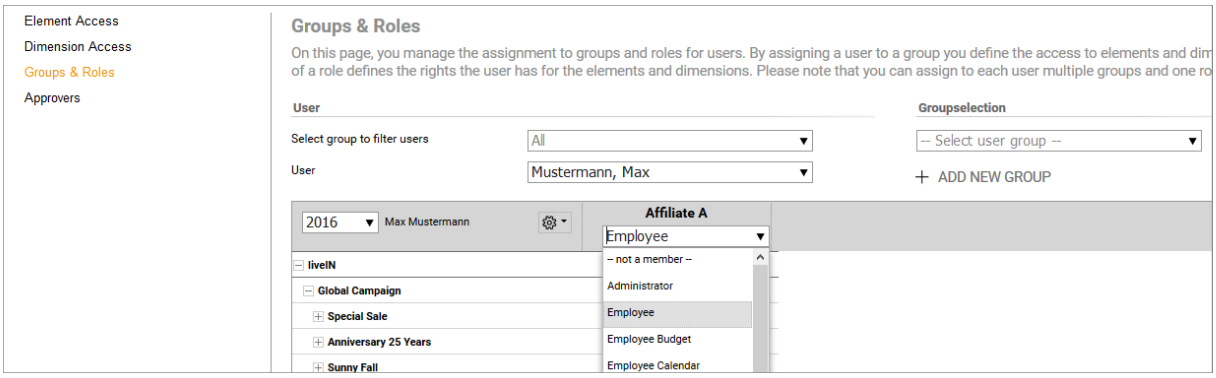
You have already created a user group.

Step by step

1. Choose > *User* > *Groups & Roles*.
2. From the *Select user group* dropdown list, select the *All* entry.
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 user group* dropdown list to restrict the user dropdown list. In the *User* dropdown list, only the users assigned to the user group that you have chosen can be selected.



7.2.4 Changing the name of a user group

You want to change the name of a user group (from `Branch - South` to `Branch - South-East`, for example).

1. Choose > *User*.

This opens the *Element access* tab.

2. Select *Branch South* via `Select user groups`.

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.

7.2.5 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*, choose `Branch – South`.

   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.

7.2.6 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.

1. Choose > *User*.

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

2. Choose the *Approvers* tab.
3. 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.

7.3 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.

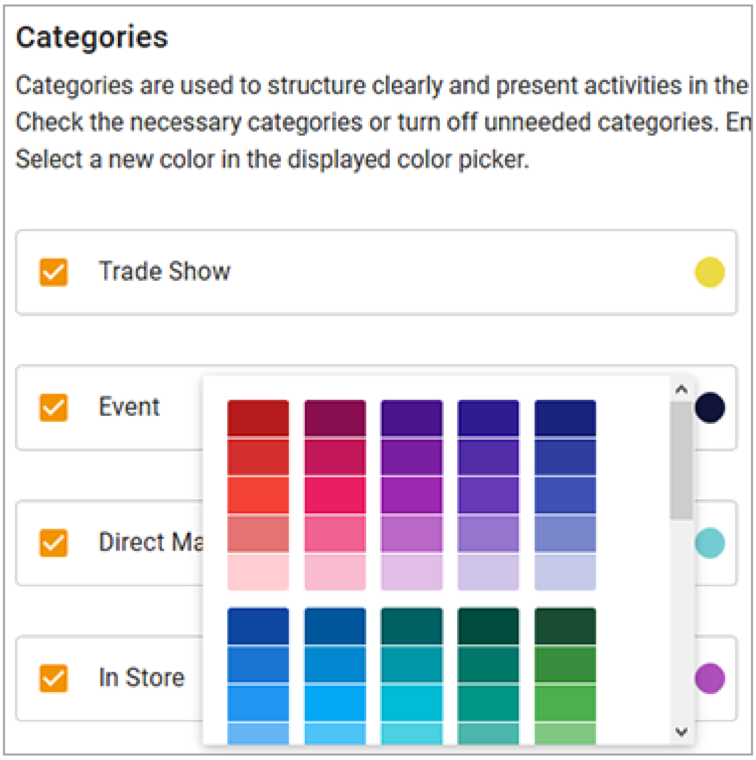
7.3.1 Creating categories

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 point for the activated categories.

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

You have created categories.



7.4 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.

7.4.1 Entering level names

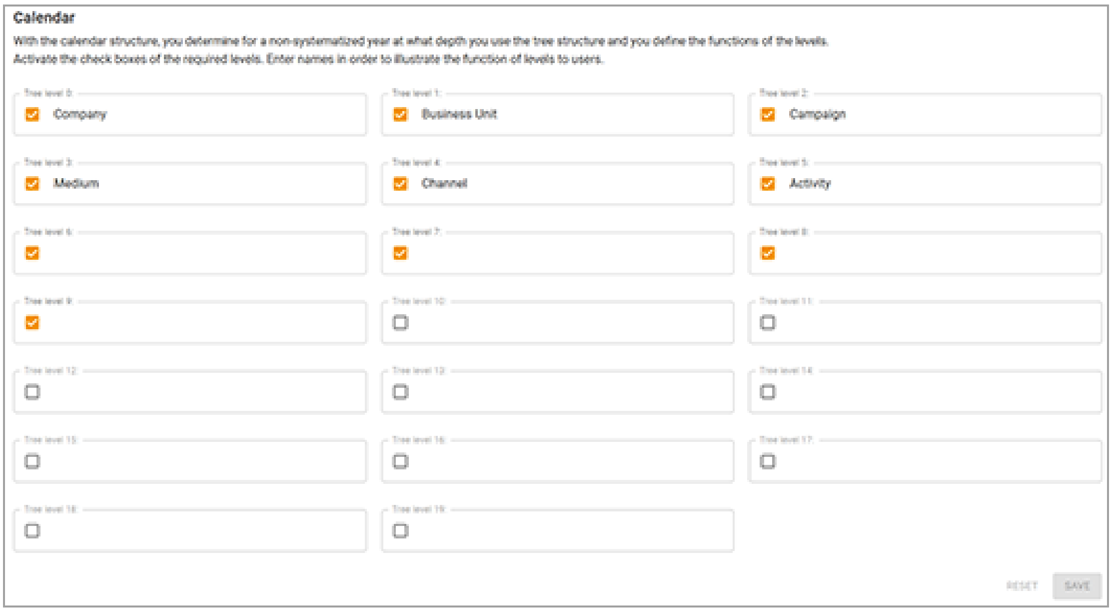
You want to enter the name for the levels so that you can map your marketing plan in a structured way.

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 checkboxes at the same time, set the checkmark for level 20. To deactivate the checkbox for all unneeded levels at the same time, remove the checkmark from the first unneeded level name.

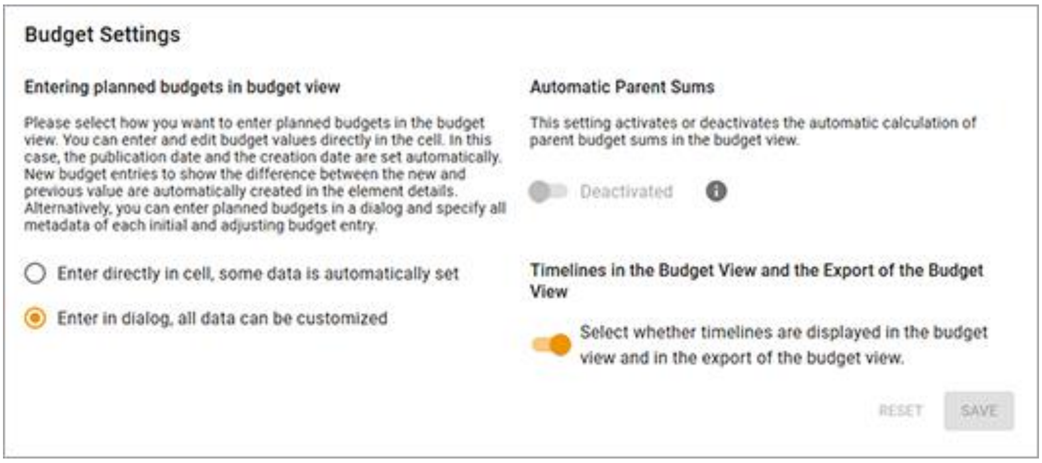
3. Enter the level names in the input fields.
4. Click *Save* to save your entries.

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.



7.5 Budget

Under > *Marketing Planner* > *Settings* > *Budget*, you can adjust important settings for the editing of the budget:



Enter planned budget in the budget view

Choose how you want to enter planned budgets in the budget view. You can enter and edit values directly in the cell. In this case, the publication date as well as the creation date will be set automatically. New budget entries to show the difference between the new and previous value are automatically created in the element details. Alternatively, you can enter planned budgets in a dialog box and set all metadata of each initial and adjusting budget entry.

Automatic parent totals

This setting enables or disables automatic calculation of parent budget totals in the budget view.

> **Note**
>
> Once budget data has been entered, the setting can no longer be changed.

Periods in the budget view and the export of the budget view

Select whether periods are displayed in the budget view and in the export of the budget view.

7.6 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	You choose a icon. The icon is displayed next to the name in the element tree, for example. You have the option to either choose a default icon or upload an icon: • Standard icons:  If you choose the gray square, no icon will be displayed. • Icon uploading is limited to GIF, PNG and SVG formats. 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, when creating or editing an element type, click the icon and choose the desired action from the context menu.
Font properties	You define the following properties: • *Bold*: Defines whether the name is highlighted in bold in the element tree. • *Italic*: Defines whether the name is highlighted in italics in the element tree. • *Text Color*: Defines the color in which the name is displayed in the element tree. • *Background color*: Defines the background color used to display the element. Note that the entire row in the calendar and budget view gets the 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 7.6.1)
- Activating an element type (see chapter 7.6.2)

- Editing an element type (see chapter 7.6.3)
- Deleting an element type (see chapter 7.6.4)

7.6.1 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:
    - Select an icon: Click the icon you want. Standard icons are selected directly. For other icons, a context menu is opened. Click *Selection icon*.

    or

    - Load your own icon and select the uploaded icon. Note restrictions in file format and size, see Chapter 7.5.
5. Optional: Edit the element type display.
6. Click *Save*.

You have created the element type.

7.6.2 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 .

7.6.3 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.

7.6.4 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.

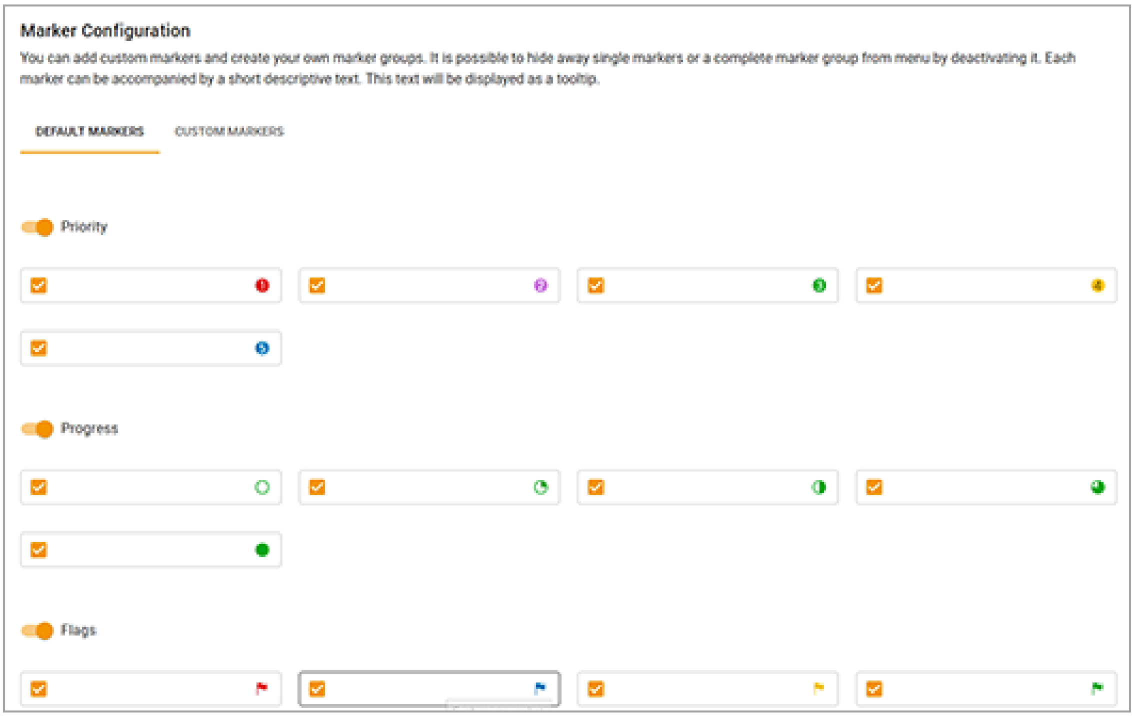
A confirmation prompt is displayed.

3. Click *Yes*.

You have deleted the element type.

7.7 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 to the user is displayed as a tooltip on mouseover, for example in the Elements tree, on the General and Tasks tabs in the detailed view, in dashlets, and on Tasks in the calendar.

Associated tasks

- Configuring a default marker (see chapter 7.7.1)
- Creating a custom group and markers (see chapter 7.7.2)
- Editing a custom group and markers (see chapter 7.7.3)
- Deleting a custom group and markers, see Chapter 0

7.7.1 Configuring a default marker

1. Click > *Marketing Planner* > *Settings* > *Markers.*
2. Make sure you are on the *Default marker* tab.
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 field of each marker (max. 255 characters).
5. Click *Save*.

You have configured the default markers.

7.7.2 Creating a custom group and markers

1. Click > *Marketing Planner* > *Settings* > *Markers.*
2. Switch to the *Custom Markers* tab.

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. Drag and drop the files for the marker icons or click the upload area to search for the files.
6. Click *Save*.

The dialog box closes.

7. If you want the group to be available directly to users, click the button to the left of the group name.
8. If you do not want to make individual markers available to the group, click the button to the left of the group name.
9. Inform the users about the function or use of the active markers by entering a short description in the field of each marker (maximum 255 characters).
10. Click *Save*.

Users can now use the activated markers.

7.7.3 Editing a custom group and markers

1. Click > *Marketing Planner* > *Settings* > *Markers.*
2. Switch to the *Custom Markers* tab.

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. Click the *Replace Marker* button on the right of the marker icon you want to replace.
   b. 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:

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

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

   c. Click the *Delete marker* button on the right of the marker icon you want to delete.

8. Click *Save*.

The dialog box closes.

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

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

7.7.4 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. Click > *Marketing Planner* > *Settings* > *Markers.*
2. Switch to the *Custom Markers* tab.

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 *Delete marker* button.

   The marker icon is deleted.
5. Optional: Delete the marker group.
   a. Choose *Delete group*.

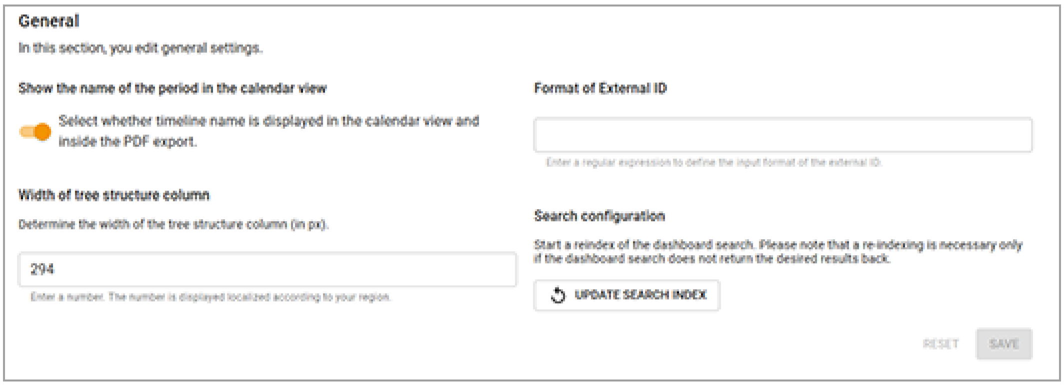
   A confirmation prompt is displayed.

   b. Click *OK*.

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

7.8 General settings

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



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.

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.

Save changes

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

7.9 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 also need to decide which logic will be 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: • Exchange rates can be defined for each month. The annual budget in the reference currency is calculated with the exchange rate of the first month of the current year. • "Horizontal" automatic totals (the total of the monthly budgets) are deactivated.	*Effects:* • Exchange rates can be defined for each month. Changes are taken into account during recalculation. • "Horizontal" automatic totals (the total of the monthly budgets) are activated. • The annual budget total is calculated from the individual monthly values.

Changing the planning type

A dropdown list lets you choose between the Top-Down Method and the Bottom-Up Method logic for budget calculation. Monthly exchange rates are applied.

> **Note**
>
> You cannot change the planning type of a year if at least one budget entry has already been created for the year. Remove all budget entries for a year if you want to change its planning type.

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.

Application of exchange rates to new years

Exchange rates for new years are applied as follows: The new year applies the exchange rate of the last month in the initial year for all months. You can subsequently edit the applied exchange rates.

Deleting a year

A year that contains at least one element with a blanket order and an assigned call order cannot be deleted. Before deleting, all assignments of call orders must be deleted.

7.9.1 Creating a new year

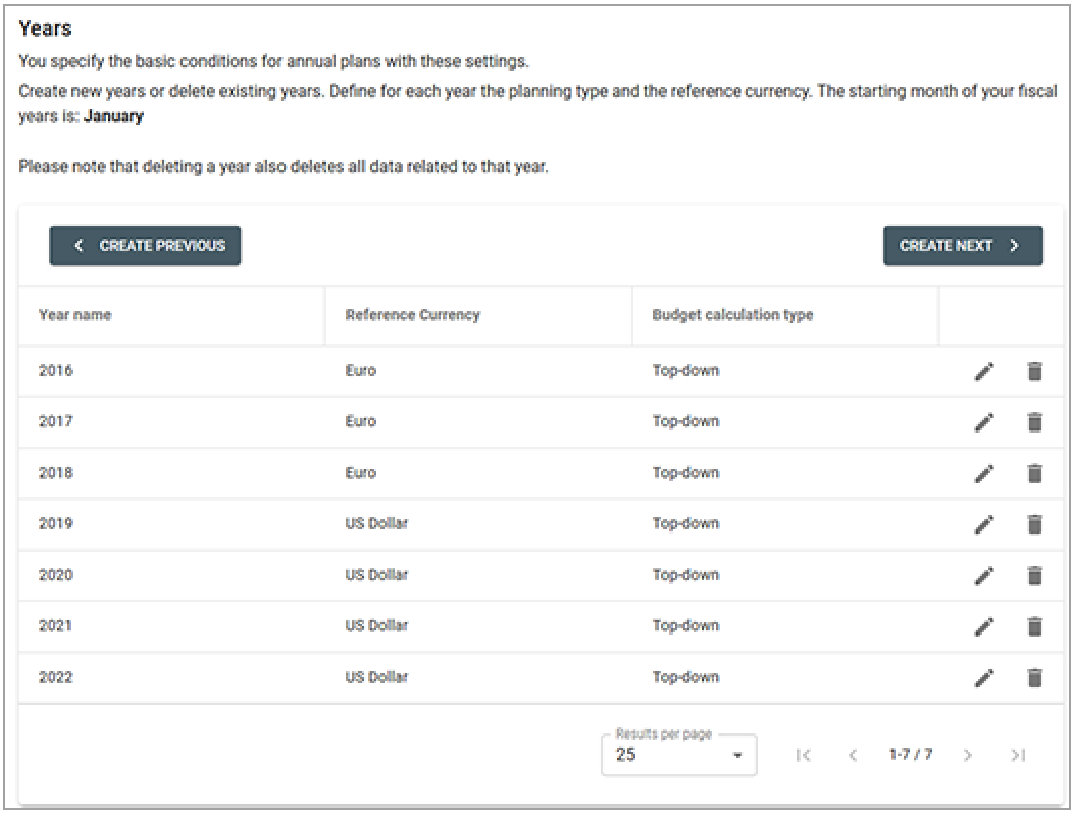
You want to create a new year for your marketing plan.

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.



7.9.2 Change the designation of a year

You want to change the designation 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*.

   The tabular overview of the years already created is displayed.

2. Click the pencil icon of the year for which you want to change the original designation.

   The Edit dialog box will be displayed.

3. Change the name of the year.
4. Click *Save*.

You have changed the designation for the selected year.

7.9.3 Defining a planning type

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

> **Note**
>
> You cannot change the planning type of a year if at least one budget entry has already been created for the year. Remove all budget entries for a year if you want to change its planning type.

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

   The tabular overview of the years already created is displayed.

2. Click the pencil icon of the year for which you want to define the logic of the budget calculation:
3. The Edit dialog box will be displayed.
4. Set the Planning type:
   - Select *Top down* from the dropdown list to work with budget values defined centrally.
   - Select *Bottom up* from the dropdown list to work with budget values that marketing departments can define themselves.
5. Click *Save*.

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.

7.9.4 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*. This text specifies the starting month of your fiscal year.

7.10 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.

> **Note**
>
> You can also delete a dimension value at any time during editing. If a dimension value is already assigned to elements, the value will be deleted from all elements.
> Note the special features for weighted multiple selections: If a weighted multiple selection value is deleted, all elements to which this value was assigned will have all other values of this dimension deleted as well.

ID

Every dimension receives an ID automatically when you create it. You need the ID when the dimension is called up via an API or synchronized with a job, for example.

You can find the ID of a dimension in two different ways:

- You activate the display of the ID under > *Marketing Planner* > *Settings* > *Dimensions* in the table in a column.
- You activate the display of the ID in the detailed view of a planning element on the *Dimensions* tab in a table column. For more information, see Chapter 2.4 in the *Modifying* section. Note that not all dimensions are assigned to each planning element.

7.10.1 The "Dimensions" tab

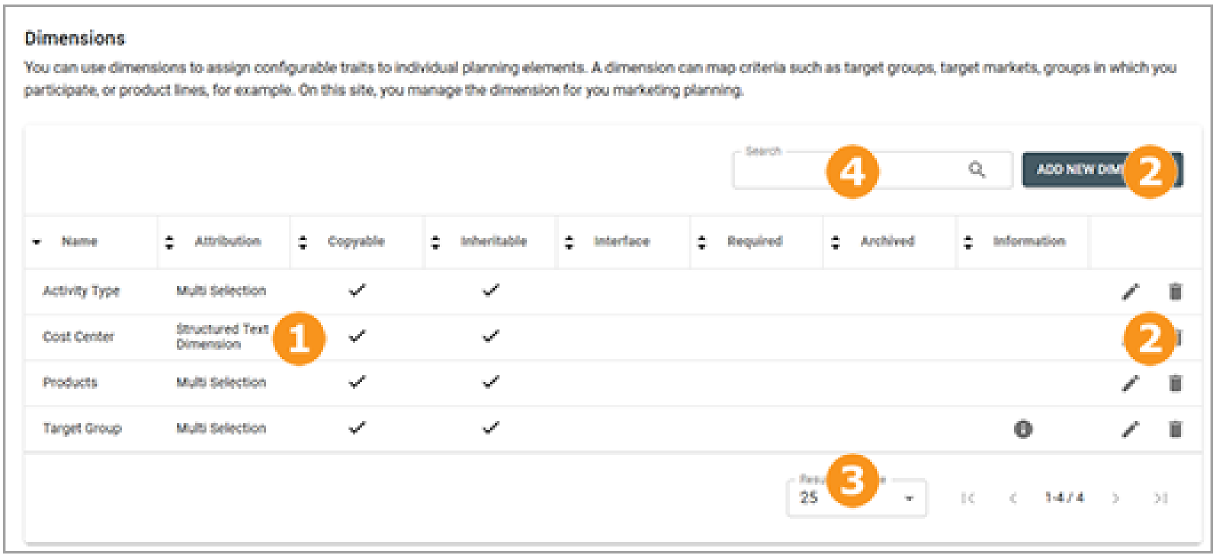
You access the page for configuring the dimensions by choosing > *Settings* > *Dimensions*:

Structure

The table displays all the dimensions that have been created already (1). Use the buttons to edit dimensions (2).

Use the dropdown list below 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.



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.

- 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*.

7.10.2 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.

7.10.3 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 40). 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 detailed 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.

7.10.4 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. Click *Add*.

This activates the input screen.

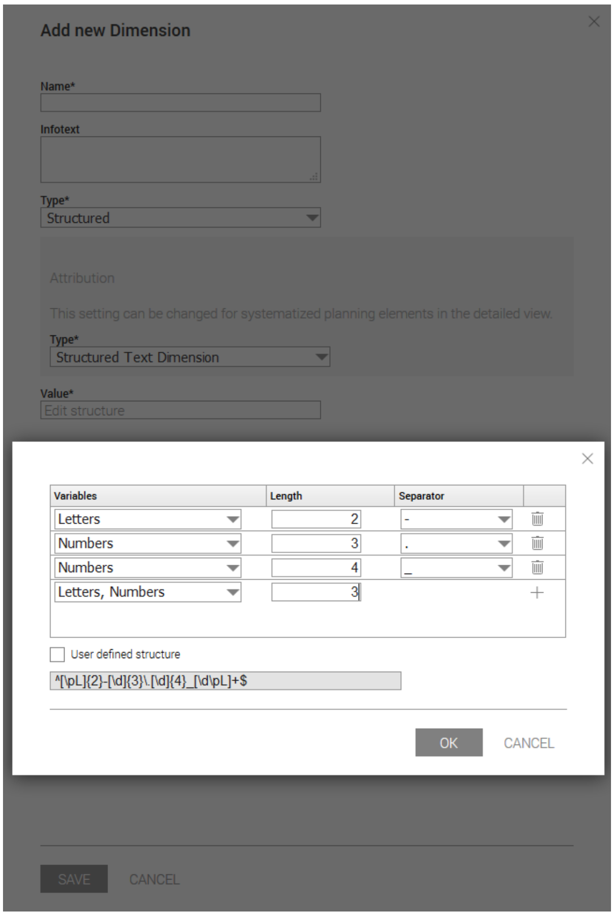
3. Enter a name.
4. If necessary, enter information text. Use the formatting functions to display complex descriptions clearly.
5. From the *Type* dropdown list, select the entry Structured.
6. Click *Edit structure* in the *Value* field.

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 icon* to display the *Separator* column and a second input field.

10. Select a dash (−) from the *Separator* dropdown 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 icon* to display the *Separator* column and a third input field.
14. Select a period (`.`) from the *Separator* dropdown list.
15. Select `Numbers` as the variable for the third 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* dropdown 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.



7.10.5 Creating the "List/Tree" type

You want to create a *List/Tree* type dimension with the *Weighted Multi Selection* attribution. 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. Click *Add*.

This activates the input screen.

3. In the *Name* input field, enter the designation of the dimension: `Advertising material - Projected budget`.
4. From the *Type* dropdown list, select the *List/Tree* entry.
5. Select the *Weighted Multi Selection* entry 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.

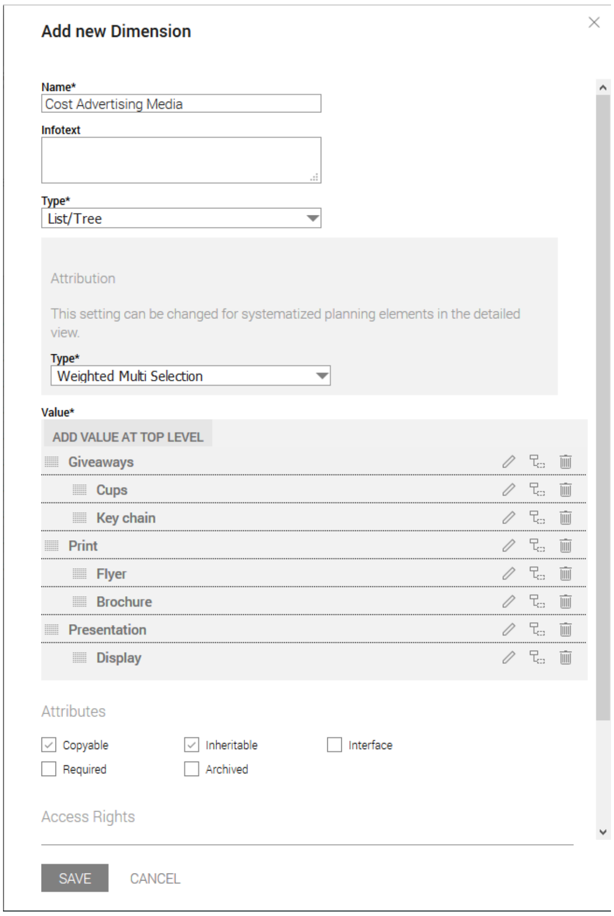
9. Enter *Cups*.
10. Click .
11. Click in the *Giveaways* line.

A lower-level field opens.

12. Enter *Key rings*.
13. Click .
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.



7.11 KPIs

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

7.11.1 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 status (2). Use the dropdown list on the right below 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:

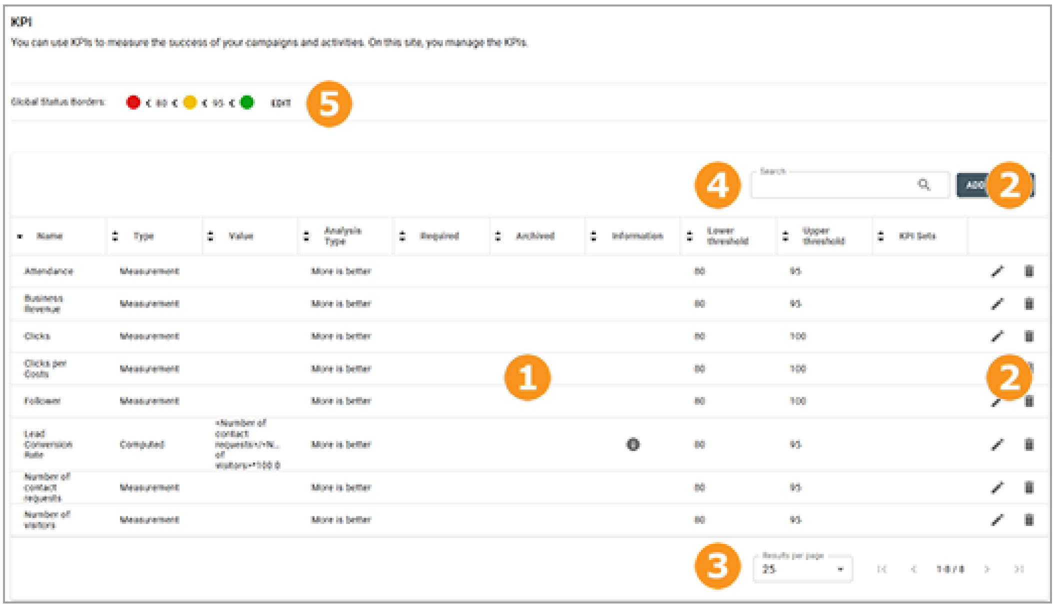
- The percentage value below which the red light is triggered
- The percentage value at which the green light is triggered

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.

- 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*.

7.11.2 Creating a KPI

When you click the *Add* button under *> Settings > KPIs,* the *Add new KPI* 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.
Information concerning weight, target or statement	Provide users with assistance by describing how they should process the KPI.
Mandatory	You can define whether the KPI has to be used for each element of the tree structure. You can only flag the *Computed* and *Measurement* types. **Note:** Note that a KPI cannot be archived and a mandatory KPI at the same time.
Archive	This determines whether the KPI is to be archived. You can only archive the *Computed* and *Measurement* types. **Note:** Note that a KPI cannot be archived and a mandatory KPI at the same time.
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. 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.
Type	**Please note:**the KPI type can only be changed if the KPI has not been used on a planning element. Define how the values for the KPI for the element are to be created: • *Measurement*: This value is entered by the user. • *Computed*: This value is calculated using the specified formula. • *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. In the default setting, the following constants from budget planning can already be used: Planned, Target, Committed, Actual, Projected budget, Residual budget and MDF. The values refer to the element for which the KPI is calculated.

Name	Description
Formula	**Note:** This is visible only if the *Type* is *Computed*. 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: • * for multiplication • / for division • + for addition • - for subtraction • () parentheses You can use created KPIs or system KPIs for the formula. System KPIs correspond to the *Planned*, *Target*, *Committed*, *Actual*, *Projected budget* *Residual Budget* and *MDF* columns. The system KPIs are calculated as a total of the values from the years for which the KPI is calculated.
Analysis type	You can define how the values stored for the status borders are interpreted in relation to the traffic light control system. • *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. • *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.
Status borders	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. If you click *Set from global*, you copy the value that you entered in > *Settings* > *KPIs*. **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.

7.11.3 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:

- 100*<Number of contact requests>/<Number of visitors>

To create the KPI Lead Conversion Rate, you also require the KPIs Number of contact requests and Number of visitors.

> **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. Click *Add*.

The *Add new KPI* dialog box appears.

3. Enter Number of contact requests in the *Name* input field for the KPI.
4. Select the *Measurement value* type.
5. From the *Type* dropdown list for *the application*, select the *More is better* entry.
6. Enter the corresponding Status borders.
7. Click *Save*.

The dialog box closes.

8. Click *Add*.

The *Add new KPI* dialog box appears.

9. Enter Number of visitors in the *Names* input field for the KPI.
10. Repeat steps 4 to 7.
11. Click *Add*.

The *Add new KPI* dialog box appears.

12. Enter Lead Conversion Rate in the *Names* input field for the KPI.
13. From the *Type* dropdown list, select the entry *Computed*.
14. Click the *Formula* field.

The *Define formula* dialog box is displayed.

15. Enter the required formula using the formula wizard:
    a. Click *Add Number*.

    The Number 0 is inserted.

    b. Click the number.

    An input dialog box is displayed.

    c. Enter the number *100*.

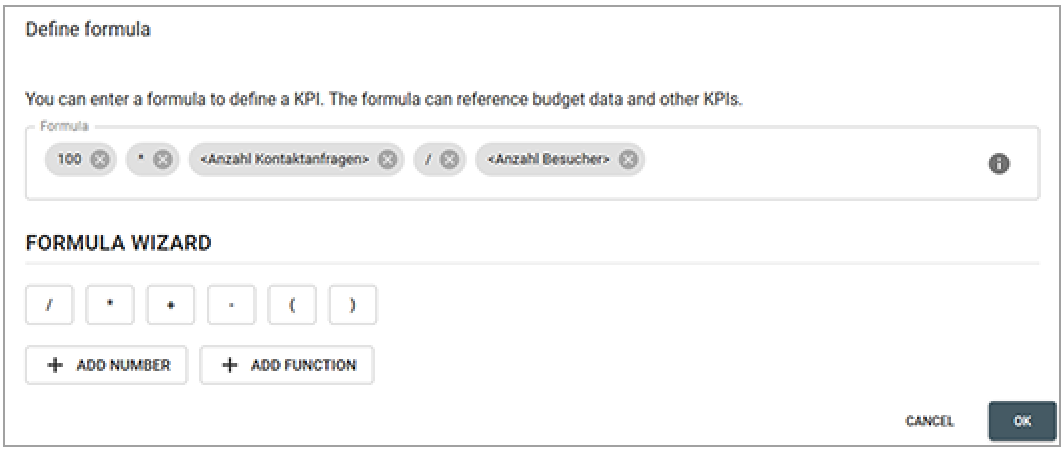
d. Click *OK*.

e. Click the multiplication sign icon.

f. Click > *Add function* > *KPI* > *Number of contact requests*.

g. Click the division sign icon.

h. Click > *Add function* > *KPI* > *Number of visitors.*



16. From the *Type* dropdown list, select the *More is better* entry.
17. Enter the corresponding Status borders.
18. Click *Save*.

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

7.11.4 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 211.
   - If the KPI has been created: Click the pencil icon in the row of the KPI you want to assign to a KPI set.
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 *KPI Sets* column.

7.12 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 will be deleted. You cannot reverse the deletion.

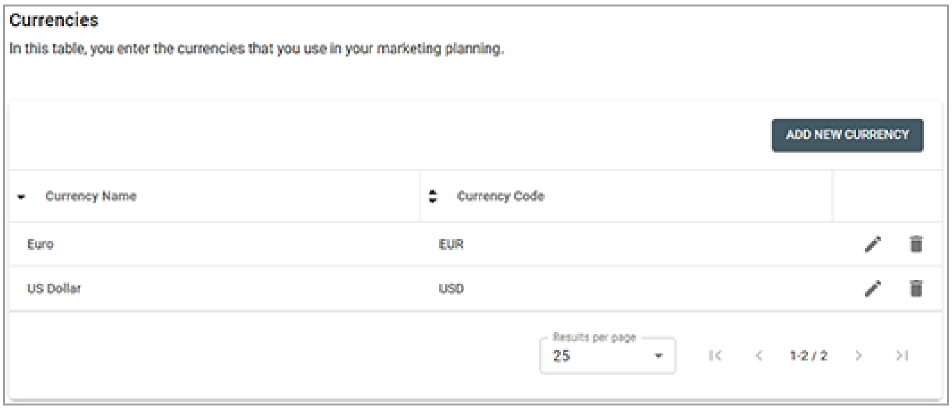
7.12.1 Creating a currency

1. Click > *Settings* > *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. Click *Save*.

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.



7.12.2 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*.
2. From the *Date* dropdown list, select the year and month 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*.

The *Add new exchange rate* dialog box appears.

4. Select the pivot currency from the *Currency* selection list.
5. Select one of the defined values from the *Units* dropdown list. 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 get an exchange rate with four decimal places, you need the factor 1000. So enter the exchange rate 14.3575 and the unit 10000.

7. Click *Save*.

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.

7.12.3 Defining a 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* > *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.

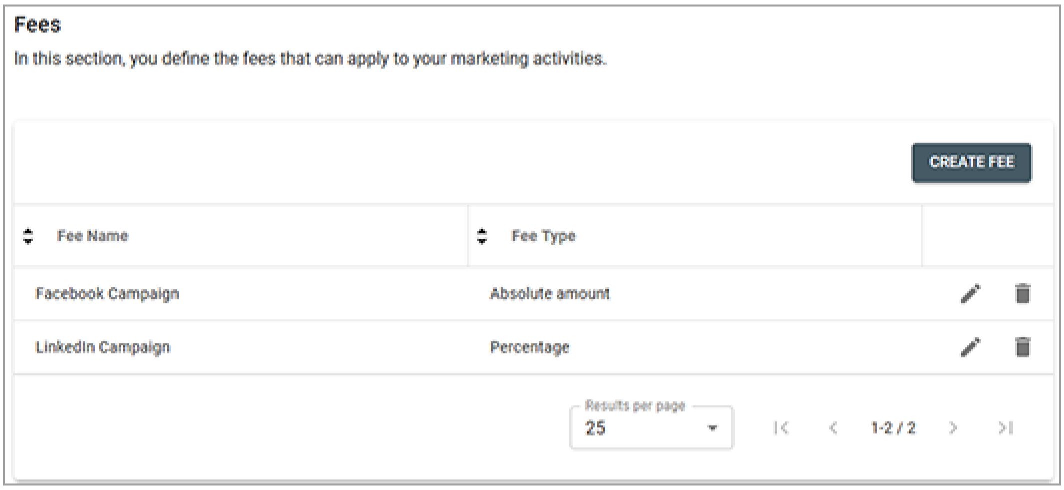
You have defined a working currency for the selected planning element and can plan the marketing measures in a currency that differs from the reference currency. The working currency is inherited automatically by the sub-elements. In the budget view, you can choose whether the *Currency Column* displays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

7.13 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 per month under > *Marketing Planner* > *Settings* > *Fee amount*.



Associated tasks

- Creating a fee (see chapter 7.13.1)
- Editing a fee (see chapter 7.13.2)
- Defining the fee amount (see chapter 7.13.3)
- Deleting a fee (see chapter 7.13.4)

7.13.1 Creating a fee

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. Click *Create fee*.

   The *Create fee* dialog box appears.
3. Enter the fee names.
4. Select the charge type from the dropdown list (*Percentage* or *Absolute amount*).
5. Click *Save*.

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 7.13.3.

7.13.2 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 amount can vary from month to month (see Chapter 7.13.3).

1. Choose > *Marketing Planner* > *Settings* > *Fees.*
2. Click the pencil icon next to the fee you want to edit.

   The *Edit fee* dialog box opens.
3. If necessary, change the fee name and fee type.
4. Click *Save*.

You have edited the fee.

7.13.3 Defining the fee rate

1. Click > *Marketing Planner* > *Settings* > *Fee amount*.
2. Above the table, specify the year and month for which you want to set the fee amount.
3. Click *Enter fee amount*.

The *Enter fee amount* dialog box is displayed.

4. Select the fee for which you want to enter the fee amount.
5. Enter the fee rate.
6. Click *Save*.

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.

7.13.4 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. Click the recycle bin icon by the fee you would like to delete.

A security prompt is displayed.

3. Click *Yes*.

You have deleted the fee.

7.14 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 5.3). 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.

7.15 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: • The depth of the tree structure • 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.

Name	Description
Marker	You can configure the markers that are available to users: • Activate or deactivate markers from the default set • Create and manage your own markers • Manage short help texts for the markers
General	You specify the following: • The display of the timelines in the budget view and in the export of the budget view • The display of the timeline name in the calendar view and calendar view export • The regular expression for the external ID of the planning elements • Starting re-indexing of the dashboard search The changes come into effect only after you save and reopen the Marketing Planner.
Years	Here, you create the years for which you can create a marketing plan. You can restore the original name of a year. This creates the planning type for the created year. Choose: • Top down to work with budget values stored centrally. • 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. 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.

7.16 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.