BrandMaker GmbH

Marketing Planner Administration Manual

Version 7.2

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Inhalt

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Start

1

The settings and configurations described below are required to work with the 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.

1.1 New and changed functions

In the version7.2in the module *Marketing Planner* no significant innovations were introduced.

Secondary exchange rate

Up to now, it has already been possible to convert budget data into a reference currency via exchange rates and thus to compare budget data with different working currencies. Version 7.2 introduces a secondary exchange rate in addition to the already used primary exchange rate. This allows departments, for example, to work with different exchange rates.

An administrator can activate the use of the secondary exchange rate under > *Planner* > *Settings* > *Exchange rates*.

For more information please visit *Currencies & exchange rates* on page 67

Quick filters

With Version 7.2, quick filters have been introduced. Quick filters allow a quick comparison of a planning element, for example a campaign, with similar elements. To do this, the user clicks on the element to be compared and selects the relevant dimension. For example, the user can select the Target Group dimension. Then, only planning elements with the same value for that dimension will be displayed.

An administrator defines which dimensions are available for the quick filter function under > *Planner* > *Settings* > *Dimensions*.

For more information please visit *Dimensions* on page 53 in the *Attribute* section.

For a complete overview of all changes, please refer to the Release Notes7.2.

1.2 Target group

This manual is intended for Marketing Efficiency Cloud users who *Marketing Planner* set up and/or manage the module. These readers should be familiar with the use of the module (see the Marketing PlannerUser Manual under *Further documentation* on the facing page).

Further documentation on the facing page

Note

Please note that for setting up or managing the module, *Marketing Planner* you need rights for the use of the administration. The rights that you require are not described in this manual. If you have any questions, please contact your system administrator.

1.3 Further documentation

This page provides links to documents containing additional information:

- Administration Manual
- Marketing Planner User Guide
- Basic User Guide
- Media Pool User Guide

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Authorizations 2

With authorizations, you define which Planner components, planning elements and dimensions users have access to. This allows you to control that users only access the functions and elements they need for their tasks. In order for a user to work in the Planner, the user needs a role with appropriate rights and must be assigned to at least one user group.

- Rights and roles: You create roles and assign rights to the role. Rights define access to components and functions of the Planner. For example, a role can be given access to the budget view, but not to the calendar. Consequently, a user with this role can edit and analyze budget and expense data in detail, but cannot enter timelines for marketing activities in the calendar.
  For more information, see chapter *Rights and roles* on the facing page.
- User groups:Several users are grouped together in user groups. In addition, each user group is granted access to a part of the planning elements and dimensions. For example, if your element tree is divided by regions such as North America, South America, and EMEA, only the user group responsible for South America can be assigned access to these planning elements.
  For more information, see chapter *Groups* on page 23.

2.1 Rights and roles

You create roles and assign rights to the role. Rights define access to components and functions of the Planner. For example, a role can be given access to the budget view, but not to the calendar. Consequently, a user with this role can edit and analyze budget and expense data in detail, but cannot enter timelines for marketing activities in the calendar.

Details about rights can be found in chapter *Rights* below.

Roles are created in the Administration, please refer to the Administration manual, see chapter *Further documentation* on page 11.

These roles are created by default in the Planner and can be customized:

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 calen-dar	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 that a user in the Planner must be assigned a role in combination with a user group. Refer to the chapter*Authorizations* on page 13for further inform-ation.

2.1.1 Rights

With rights you control which parts of the Planner a user who has a certain role can see.

General rights

Designation	Description	Notes
MODULE_ACCESS	The user can call up the Marketing Planner module.	

Rights for sub-areas

Designation	Description	Notes
MAPS_MODULE_DASHBOARD_VISIBLE	The user can view *Marketing Planner > Dashboard*.	
MAPS_MODULE_CALENDAR_VISIBLE	The user can view *Marketing Planner > Calendar*.	
MAPS_MODULE_REPORTS_VISIBLE	The user can view *Marketing Planner > Reports*.	
MAPS_MODULE_TOOLS_VISIBLE	The user can view *Marketing Planner > Tools*.	
MAPS_EXPORTS_VISIBLE	The user can use all export functions in the Marketing Planner, e.g. in the dashboard, the calendar or the budget view.	
MAPS_SAVE_VIEWS_VISIBLE	The user can save views.	
MAPS_PUBLISH_VIEWS_VISIBLE	The user can publish saved views.	

> **Note**
>
> The sub-area > *Planner* > *Budget* is visible when the user has the MAPS_BUDGET_READ right.

Rights for the calendar

Designation	Description	Notes
MAPS_ ELEMENT_ WRITE	The user can create the elements in the tree structure in the calendar.	
MAPS_ ELEMENT_ COPY	The user can copy elements.	
MAPS_ ELEMENT_ RELOCATE	The user can cut out and move elements.	
MAPS_ ELEMENT_ DELETE	The user can delete elements.	Users that have the MAPS_YEAR_WRITE right can delete years and the elements that they contain.
MAPS_ ELEMENT_ EXTERNAL_ RESOURCES	The user can reach the *Assign external resource* function in the context menu of a planning element if a system has been specified in the system settings whose resources are to be synchronized with the Marketing Planner.	
MAPS_ PERIOD_READ	The user can view and copy timelines.	
MAPS_ PERIOD_ WRITE	The user can create timelines, insert copied timelines and edit timelines.	

Rights for the budget

Designation	Description	Notes
MAPS_ BUDGET_ READ	The user reaches the > *Planner* > *Budget* sub-area and can view values from the budget view.	
MAPS_ BUDGET_ WRITE	The user can add or change values in the budget.	To reach the > *Planner* > *Budget* sub-area, the user needs the MAPS_ BUDGET_READ right.

Rights for the detailed view

Designation	Description	Notes
MAPS_GENERAL_READ	The user can view the *General* tab but not edit it.	
MAPS_GENERAL_WRITE	The user can edit the *General* tab (add, change, or delete) and comment on the plan-ning element.	
MAPS_TARGET_READ	The user can view the *Target budget* tab but not edit it.	
MAPS_TARGET_WRITE	The user can edit the *Target budget* tab (add, change, or delete).	
MAPS_MARKER_READ	The user can view markers but not edit them.	
MAPS_MARKER_WRITE	The user can edit markers (add, change, or delete markers).	
MAPS_ELEMENT_ ACTIVITY_STREAM	The user can access the activity history in the detailed view on the *General* tab.	
MAPS_ELEMENT_ MANAGE_WATCHER	The user can manage (add/remove) watchers on elements.	
MAPS_ATTACHMENT_ READ	The user can view the *Attachments* tab but not edit it.	

Designation	Description	Notes
MAPS_ATTACHMENT_ WRITE	The user can edit the *Attachments* tab (add or delete attachments).	
MAPS_SUNKCOST_READ	The user can view the *POs* tab but not edit it.	
MAPS_SUNKCOST_ WRITE	The user can edit the *POs* tab (add, edit or delete POs).	
MAPS_BILL_READ	The user can view the *Invoices* tab but not edit it.	
MAPS_BILL_WRITE	The user can edit the *Invoices* tab (add, edit or delete invoices).	
MAPS_MDF_READ	The user can view the *MDF* tab but not edit it.	The system setting *enabledMDF = true* must also be set. For more information, please contact your system administrator.
MAPS_MDF_WRITE	The user can edit the *MDF* tab (add and request MDFs).	
MAPS_FEES_READ	The user can view the *Fees* tab but not edit it.	
MAPS_FEES_WRITE	The user can edit the *Fees* tab (assign fees to the planning element, edit or delete fees).	
MAPS_FEES_ OVERWRITE_GLOBAL	The user can override globally set charges on an element.	
MAPS_TASK_READ	The user can view the *Tasks* tab but not edit it.	
MAPS_TASK_WRITE	The user can edit the *Tasks* tab (add, edit or delete tasks)	

Designation	Description	Notes
MAPS_JOB_WRITE	The user can add a job on the *Tasks* tab.	The user also requires the following rights in the Job Manager module: DSE_MODULE_ACCESS DSE_CREATE_JOB
MAPS_DIMENSIONS_READ	The user can view the *Dimensions* tab but not edit it.	
MAPS_DIMENSIONS_WRITE	The user can edit the *Dimensions* tab (open or edit dimensions).	
MAPS_KPIS_READ	The user can view the *KPIs* tab but not edit it.	
MAPS_KPIS_WRITE	The user can edit the *KPIs* tab (add, edit or delete KPIs)	

Rights for tools

Designation	Description	Notes
MAPS_IMPORT_BUDGETRELEVANT_DATA	The user can import budget-related data under *Marketing Planner > Tools*.	
MAPS_CHANGE_LOG	The user can access > *Tools > Change log*.	This right should be reserved for administrators.

Global settings

The user reaches the *Settings* area as soon as the user role has at least one of the following rights. In this case, the user sees all subpages, but can edit only those for which the corresponding user role has been assigned the appropriate rights.

Designation	Description	Notes
MAPS_MANAGE_CATEGORIES	The user can edit the > *Planner > Settings > Categories* area.	
MAPS_MANAGE_CALENDAR_STRUCTURE	The user can edit the > *Planner > Settings > Calendar* area.	
MAPS_MANAGE_ELEMENT_TYPE	The user can edit the > *Planner > Settings > Element types* area.	
MAPS_MANAGE_MARKER	The user can edit the > *Planner > Settings > Marker* area.	
MAPS_MANAGE_YEAR	The user can edit the > *Planner > Settings > Years* area.	
MAPS_MANAGE_KPIS	The user can edit the > *Planner > Settings > KPIs* area.	
MAPS_MANAGE_DIMENSIONS	The user can edit the > *Planner > Settings > Dimensions* area.	
MAPS_MANDATOR_SETTINGS_GENERAL	The user can change settings for the "bottom-up/top-down" functions.	

Designation	Description	Notes
MAPS_MANAGE_ EXCHANGE_RATES	The user can edit the > *Planner* > *Settings* > *Exchange rate & Currencies* area.	
MAPS_MANAGE_FEES	The user can edit the > *Planner* > *Settings* > *Fees* area.	

Rights for the My Account area

Designation	Description	Notes
MAPS_ MANAGE_ GROUPS_WRITE	The user can create, edit or delete user groups on the sub-pages from > *Planner* > *Users*.	
MAPS_ MANAGE_ GROUPS_TO_ USERS	The user can edit the assignment of users to groups under > *Planner* > *Users* > *Groups and Roles*.	
MAPS_ MANAGE_ GROUPS_TO_ DIMENSIONS	The user can edit groups' access to dimensions: • Under > *Planner* > *Settings* > *Dimensions* in the dialog boxes *Add dimension* and *Edit dimension* in the *Access rights* area • Under > *Planner* > *Users> Dimension access*	This right includes the MAPS_MANAGE_ DIMENSIONS_ WRITE right.
MAPS_ MANAGE_ GROUPS_TO_ NODE	The user can edit groups' access to planning elements: • In the detailed view on the *General* tab in the *Group* area • Under > *Planner* > *Users> Element Access*	
MAPS_ MANAGE_ APPROVERS	The user can edit the *Marketing Planner* > *My Account* > *Approvers* area.	The system setting *enabledMDF = true* must also be set.

2.2 Groups

Several users are grouped together in user groups. In addition, each user group is granted access to a part of the planning elements and dimensions. For example, if your element tree is divided by regions such as North America, South America, and EMEA, only the user group responsible for South America can be assigned access to these planning elements.

Associated tasks

Note that you must perform the following steps in sequence for a user to work in the Planner:

- *Create a user group* below
- *Defining access of a user group to elements and dimensions* on the next page
- *Assigning users and roles to user groups* on page 25

The following tasks must be performed depending on the situation:

- *Edit the name of a user group* on page 26
- *Remove user group from overview* on page 27
- *Deleting a user group* on page 27

2.2.1 Create a user group

1. Starting from the top navigation, click > *Planner* > *Users*.

   The *Element access* screen opens.
2. Choose *Create new group*.
3. Enter the name of the user group in the dialog box that opens.
4. Optional: If you want to display the user group, select the *Open user group in overview* checkbox.
5. Click *OK*.

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

> **Note**
>
> You can also create a user group on the *Dimension access* and *Groups & Roles* screens using the same sequence of actions.

2.2.2 Defining access of a user group to elements and dimensions

Prerequisites:You have already created planning elements and dimensions.

Defining access to elements

1. Starting from the top navigation, click > *Planner* > *Users*.

   The *Element access* screen opens.

2. In the *Select user group* drop-down list, select the group whose access to elements you want to specify.

   The user group is displayed in the table.

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

   The planning elements are displayed.

4. In the column of the selected user group, activate the checkboxes of the elements that the user group should access. Note:
   - Click the Plus sign next to an element to display any existing sub-elements.
   - The access is inherited by any existing sub-elements, i.e. if you activate an element on a higher level for the user group, all sub-elements are automatically activated as well.
   - If you want access to be restricted to specific individual sub-elements, you must first deactivate the checkbox for the parent element.

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

5. Click on *Save*.

You have defined which planning elements can be accessed by the users assigned to this user group.

Defining access to multiple dimensions for a user group

1. Starting from the top navigation, click > *Planner* > *Users* > *Dimension access*.
2. In the *Select user group* drop-down list, select the group whose access to elements you want to specify.

   The user group is displayed in the table.
3. In the column of the selected user group, activate the checkboxes of the elements that the user group should access.
4. Click on *Save*.

You have defined the dimensions that the Branch South user group can access.

Defining access to a dimension for multiple user groups

1. Starting from the top navigation, click > *Planner* > *Settings* > *Dimensions*.
2. Click the pencil icon in the line of the dimension for which you want to set access.

   The *Edit dimensions* dialog box opens.
3. Click on a free area in the *Access rights* field.

   A search and selection dialog box for all user groups is displayed.
4. Search and select the user groups whose users should have access to this dimension.
5. When all the required user groups are selected, click the *Edit dimension* dialog box.

   The search and selection dialog is hidden.
6. Click on *Save*.

You have chosen which user groups can access the dimension.

2.2.3 Assigning users and roles to user groups

Prerequisites:You have already created a user group.

1. Starting from the top navigation, click > *Planner* > *Users* > *Groups & Roles*.
2. From the *Select user group* dropdown list, select the *All* entry.

Note: If you want to select users from one or more specific user groups, select those user groups instead. This will usually make it easier to select eligible users in step 3.

You can select from all users in the system. If you want to select users of one or more user groups, select instead

3. From the *User* dropdown list, select the user that you want to assign to a user group.

   The user is displayed in the table header next to the year selection.

4. From the *Group selection* drop-down list, select the user group to which you want to assign the user.

   The user group is displayed in the table. In the table header, a list of available roles in the Planner is displayed under the name of the user group.

5. From the drop-down list, select the role the user is given in the user group.

   The table shows which elements the user has access to for this user group and with the selected role.

6. If necessary, repeat steps 4 and 5 if you want to assign the user to multiple groups.
7. Click on *Save*.

You have assigned the user to at least one user group and one role.

2.2.4 Edit the name of a user group

1. Starting from the top navigation, click > *Planner* > *Users* > *Groups & Roles*.

   The *Element access* screen opens.

2. In the *Select user group* drop-down list, select the group whose name you want to edit.

   The user group is displayed in the table.

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* > *Edit*.

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

6. Edit the name.
7. Click the checkmark icon.

You edited the name of the user group.

2.2.5 Remove user group from overview

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

2.2.6 Deleting a user group

You want to delete a user group.

Prerequisites:A user is not assigned to the user group. If necessary, first remove all user assignments of a group before deleting it.

1. Starting from the top navigation, click > *Planner* > *Users*.

   The *Element access* screen opens.
2. In the *Select user group* dropdown list, select the group you want to delete.

   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 *Gear icon* > *Delete user group*.

   A confirmation prompt is displayed.
6. Click *Yes*.

You have deleted the user group.

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3

Settings

You configure the 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:

- *Categories* on page 32: You define the categories according to which measures are distributed. 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* on page 34: 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 define the depth of the tree structure (up to a maximum of 20 levels) and the names of the levels.
- *Budget* on page 36: You define the settings for the budget view. These settings affect, for example, the input of budget data and the export..
- *Element types* on page 38: Element types are used to highlight planning elements as campaigns, programs, or activities, for example. This allows you to characterize the elements independently of the element structure you have created under > *Planner* > *Settings* > *Calendar on page 34*. You define the name of the type, an icon, font properties, and the background color.
- *Marker* on page 42: The Planner provides an extensive range of markers. You can choose > *Planner* > *Settings* > *Marker* to manage the markers provided by default or add your own markers if necessary.
- *General* on page 47: You can edit general settings on this screen.
- *Years* on page 48: The Planner is used to create and execute marketing plans over and for multiple years. As an administrator, you create these years on the > *Planner* > *Settings* > *Years* page. You also define the fiscal year during the initial setup of the system.
- *Dimensions* on page 53: You use dimensions to describe elements uniformly in the Planner. In a dimension, for example, you can record which target group the marketing activity is aimed at. Dimensions are set up specifically for your system.
- *KPIs* on page 60: You can use KPIs to rate the success of your marketing measures.
- *Currencies & exchange rates* on page 67: To be able to plan with country-specific currencies, you create the required currencies. To be able to compare planning and results of different countries, create exchange rates. Exchange rates allow you to convert different working currencies into the

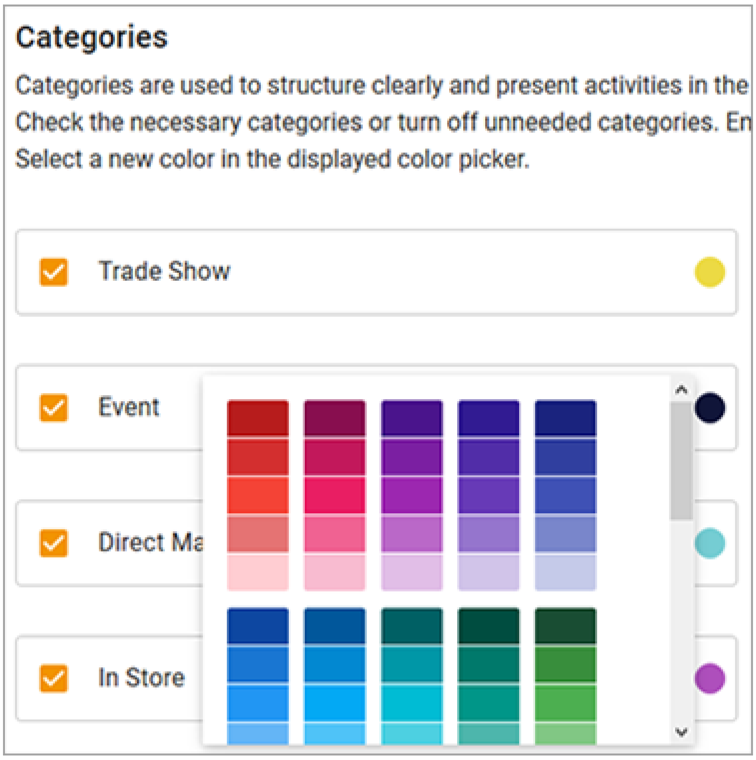
reference currency.

- *Fees* on page 70: 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.

3.1 Categories

You define the categories according to which measures are distributed. 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.

You can use up to 30 categories. When you activate a category, users can assign the category to a timeline. Note that the assignment to a timeline is retained even if the category is subsequently deactivated. However, a deactivated category is no longer available for new assignments.



For activated categories, you can enter a name for the category to explain its use to users. If you want to change the color, click on the category's color bar. Select a new color in the color picker that appears.

Set category selection

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
2. Activate the checkboxes of the required categories.
3. Enter the names of the categories in the input field.
4. With the categories activated, click the color field and select a new color in the color picker that appears.

5. Deactivate the checkboxes of any unneeded colored bars.
6. Click *Save*.

You have defined the categories available to users for creating and editing timelines.

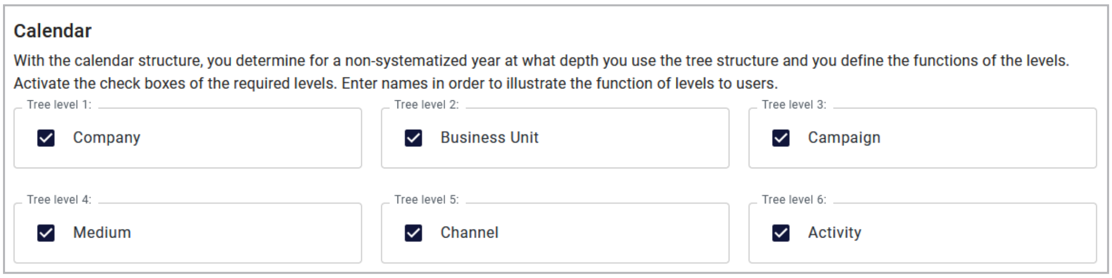
3.2 Calendar

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 define the depth of the tree structure (up to a maximum of 20 levels) and the names of the levels.

Example

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:

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



Edit layer structure

1. Starting from the top navigation, click > *Planner* > *Settings* > *Calendar*.
2. Activate the number of levels required to map your marketing plan in the structure that you want.
   Note for efficient editing of the structure:
   - If you activate the checkbox at the lowest required layer, all layers above it will be automatically activated.
   - If you activate the checkbox of the topmost layer that is not needed, all layers below it are automatically deactivated.
3. Enter the level names in the input fields.
4. Click *Save*.

You have set the basic structure of the element tree. The names of the activated layer names are displayed in the context menu when the user wants to insert an element on the same or the subordinate layer.

3.3 Budget

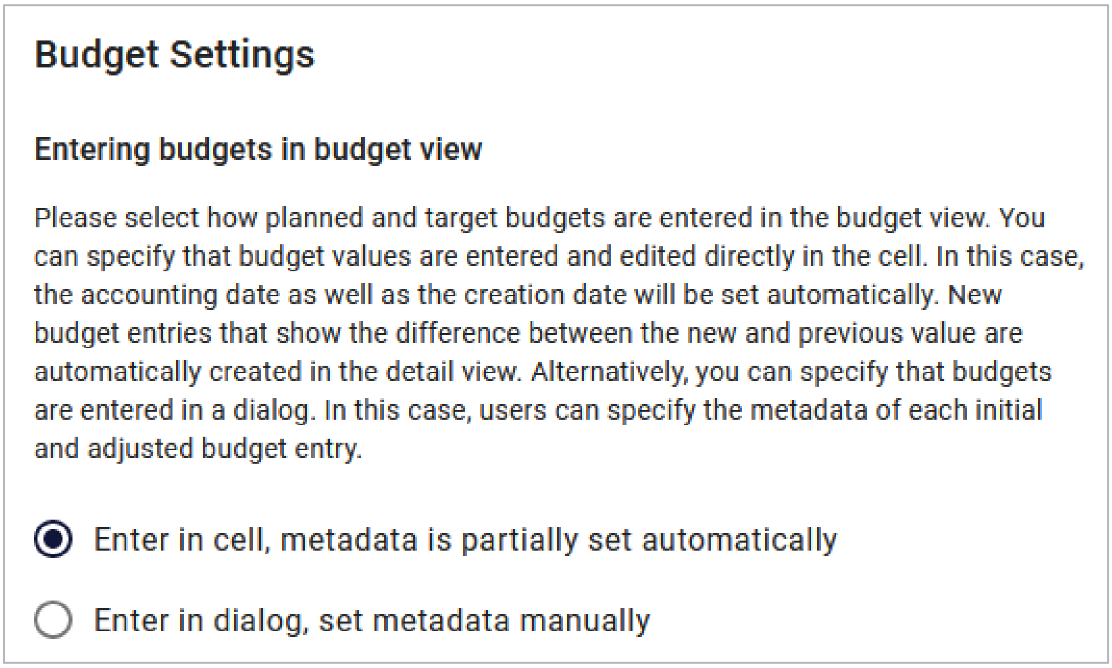
You define the settings for the budget view. These settings affect, for example, the input of budget data and the export.

The following section explains the settings in detail. Once you have made a change, save your setting by clicking *Save* at the bottom right of the screen.

> **Note**
>
> Note that you will be logged out automatically when you save changes to the settings. You will not be able to test the changes you have made until you log in again.

Enter budget in the budget view

With this setting you define how planned and target budgets are entered in the budget view.



- Enter in cell, metadata will be partially set automatically
  You can specify that budget values are entered and edited directly in the cell. In this case, the calculation date as well as the creation date will be set automatically: The calculation date will be dated to the 1st of the input month. The current date is set as the creation date. New budget entries to show the difference between the new and previous value are automatically

created in the detailed view. With this setting, entering budget entries is simplified, but data must be edited subsequently via the detailed view if required.

- Enter in dialog box, set metadata manually
  Alternatively, you can specify that budgets are entered in a dialog box. In this case, after double-clicking on the cell in the budget view, the dialog box opens. Here, users specify the amount, calculation date, and creation date, and can enter the cost type and a comment if required. With this setting, entering the amounts is less fast, but users can enter more metadata more easily and without the detailed view.

Automatic parent totals

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

> Note
>
> This setting is initially made when the system is set up. 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.

3.4 Element types

Element types are used to highlight planning elements as campaigns, programs, or activities, for example. This allows you to characterize the elements independently of the element structure you have created under *> Planner > Settings > Calendar on page 34*. You define the name of the type, an icon, font properties, and the background color.

When creating an element, the user assigns 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 select the gray square, no icon is 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.

Function	Description
Font properties	You define the following properties: • Bold: You specify whether the name is highlighted in bold in the element tree. • Italic: You specify whether the name is highlighted in italics in the element tree. • Text color: You specify the color in which the name is displayed in the element tree. • Background color: You specify the background color used to display the element. Note that the entire line 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

- *Create an element type* below
- *Activating an element type* on the next page
- *Editing an element type* on the next page
- *Deleting an element type* on page 41

3.4.1 Create an element type

1. Starting from the top navigation, click > *Planner* > *Settings* > *Element types*.
2. Choose *Add element type*.

   The *New 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 *Element types* on page 38.

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

You have created the element type.

3.4.2 Activating an element type

1. Starting from the top navigation, click > *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 . Users can now use the element type.

3.4.3 Editing an element type

1. Starting from the top navigation, click > *Planner* > *Settings* > *Element types*.
2. Click the pencil icon on the element type you want to edit.

   The *Edit element type* dialog box opens.

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

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

3.4.4 Deleting an element type

Attention!

You cannot reverse 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.

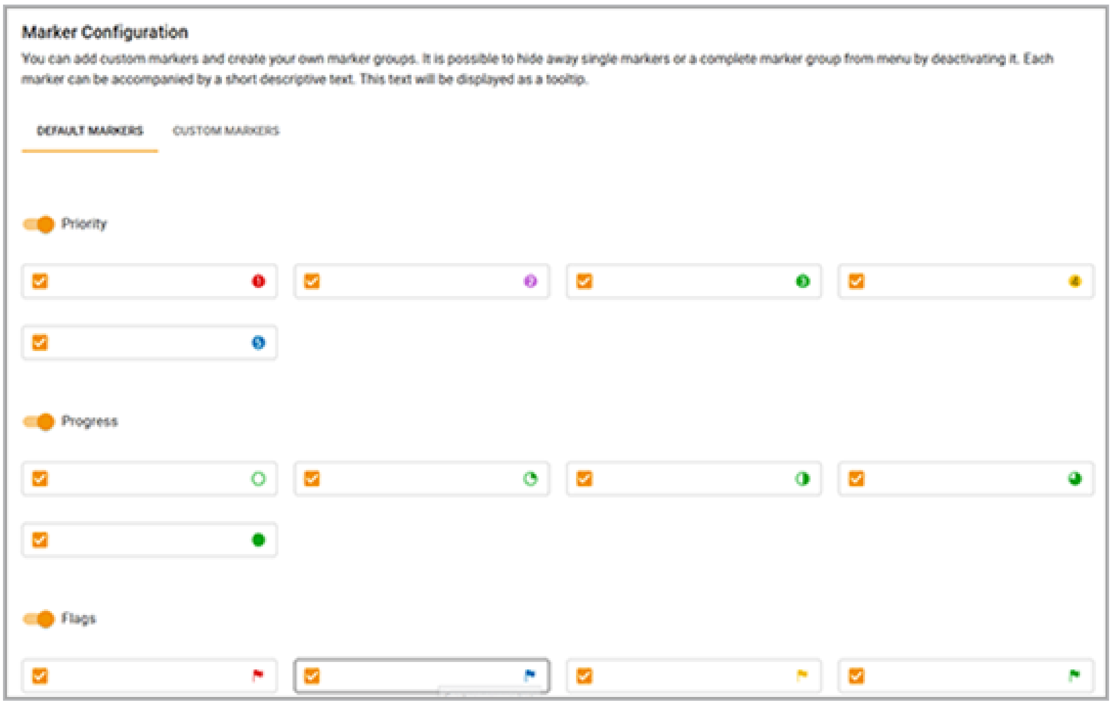
1. Starting from the top navigation, click > *Planner* > *Settings* > *Element types*.
2. Click the Recycle Bin icon for the element type that you want to delete.

   A confirmation prompt is displayed.
3. Click *Yes*.

You have deleted the element type.

3.5 Marker

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



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

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

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

Associated tasks

- *Configuring a default marker* below
- *Create a custom group and markers* below
- *Editing a custom group and markers* on the next page
- *Deleting a custom group and markers* on page 45

3.5.1 Configuring a default marker

1. Starting from the top navigation, click > *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.

3.5.2 Create a custom group and markers

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
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 group 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 to users, activate the button to the left of the group name.
8. If you do not want to make individual markers available to the group, uncheck the box for each marker you do not need.
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.

3.5.3 Editing a custom group and markers

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
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.

    a. 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.

3.5.4 Deleting a custom group and markers

Attention!

You cannot reverse 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. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
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.

3.6 General

You can edit general settings on this screen.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

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

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.

Numbering of the calendar weeks

The calendar weeks are used in the calendar view. If the fiscal year is different from the calendar year, it may be useful to adjust the numbering to the fiscal year. Therefore, specify whether the numbering is based on the calendar year or your fiscal year.

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.

3.7 Years

The Planner is used to create and execute marketing plans over and for multiple years. As an administrator, you create these years on the > *Planner* > *Settings* > *Years* page. You also define the fiscal year during the initial setup of the system.

> **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 year must therefore be entered for the planning in the Planner.

Fiscal year

You can set the starting month of a fiscal year other than January during the initial setup of the system. The prerequisite is that no planning elements or other data have been created yet. If you would like to track the starting month for your fiscal year at a later point, make a note of the text under >*Planner* > *Settings* > *Years*. This text specifies the starting month of your fiscal year.

Planning type

You also need to decide which logic will be used to calculate the individual budget values in the budget view. Click > *Planning* > *Settings* > *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.

Top Down	Bottom Up
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.

Delete 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.

Associated tasks

- *Set a fiscal year* below
- *Create year* below
- *Edit year* on the facing page
- *Delete a year* on page 52

3.7.1 Set a fiscal year

Prerequisites:No planning elements or other data have been created.

1. Starting from the top navigation, click > *Planner* > *Settings* > *Year*.
2. In the *Change starting month* area, select the month in which your fiscal year begins 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.

3.7.2 Create year

1. Starting from the top navigation, click > *Planner* > *Settings* > *Year*.
2. Select: Fiscal years are always added consecutively. Therefore, you can append the already created years to preceding or following years:

- If you want to create a preceding year, click *Create year before*.
- If you want to create a subsequent year, click *Create year after*.

A dialog box opens.

3. Choose:
    a. If you want to apply the exchange rates from the previous year, click *Yes*.
    b. If you want to create the exchange rates for this year, choose *No*.

You have created a new year.

3.7.3 Edit year

1. Starting from the top navigation, click > *Planner* > *Settings* > *Year*.
2. In the line of the year you want to edit, click the pencil icon.

    A dialog box opens.

3. Optional: Edit the name of the year. When creating, a year is named with the year written as a number, e.g. 2014.
4. Optional: Edit the planning type of the year.

    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.

5. Optional: Edit the reference currency.
6. Click *Save*.
7. If you have changed the planning type, a dialog box will be displayed.
8. If you have changed the planning type from Top Down to Bottom Up:
    a. Click *Yes*.
9. If you have changed the planning type from Bottom Up to Top Down:
    a. Choose which exchange rate to calculate with, the highest or lowest.
    b. Click *Yes*.

You have edited the year.

Note

If you have changed the planning type, you must log in again. You can only apply the changed logic for budget calculation and reload the views after a login.

3.7.4 Delete a year

Attention!

You cannot undo the deletion of 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.

1. Starting from the top navigation, click > *Planner* > *Settings* > *Year*.
2. In the line of the year you want to delete, click the recycle bin icon.

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

You have deleted the year.

3.8 Dimensions

You use dimensions to describe elements uniformly in the Planner. In a dimension, for example, you can record which target group the marketing activity is aimed at. Dimensions are set up specifically for your system.

> 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.

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.

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 > *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. Note that not all dimensions are assigned to each planning element.

Attributes

Dimensions have the following attributes:

- *Copyable*: This attribute affects the behavior of a valued dimension when an element is copied. 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 attribute if the dimension is filled via an interface. In this case, the dimension is visible but cannot be edited manually.
- *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.
- *Required*: Activate this checkbox if the dimension must be filled for each element. If a mandatory dimension is not edited, the user is informed of this on the *Dimensions* tab in the detailed view of a planning element:
    - By a warning triangle in the first column.
    - With an information message below the list.
- *Quick filter*: Activate this attribute if you want to make the dimension available to users as a quick filter. Note that the use as a quick filter is only possible for the single selection, multiple selection and free value types. Quick filters allow you to quickly compare a planning element, for example a campaign, with elements that have been assigned the same values for a dimension.

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

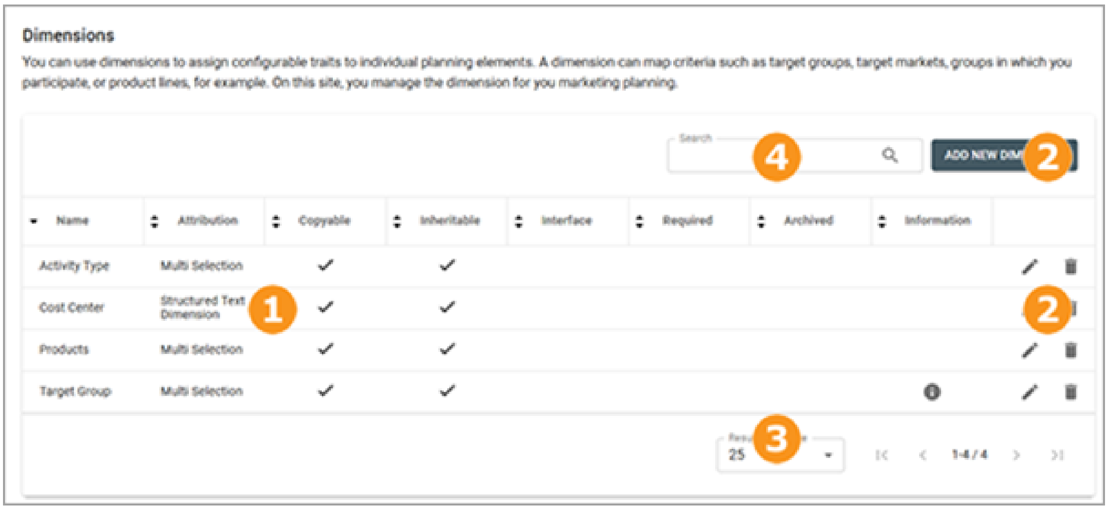
Structure of the *Dimensions* screen

You manage dimensions under > *Planner* > *Settings* > *Dimensions*.

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 screen (3). Use the arrow keys to navigate through a table with multiple screens.

If you have an extensive number of dimensions, you can carry out a full-text search in the search field 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.

Examples

- *Create dimension of the Structured type* below
- *Create List/Tree dimension type* on page 58

3.8.1 Create dimension of the *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. Starting from the top navigation, click > *Planner* > *Settings* > *Dimensions*.
2. Choose *Add new dimension*.

   A dialog box opens.
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 *Structured* entry.
6. Click on the *Edit structure* field.

   The *Create structure of a regular expression* dialog box opens.
7. Choose
   - Use the Editor to create a rule:
     a. Click *Create new rule*.
     b. A line with input fields opens.
     c. Select *Letters* as the variable.
     d. In the Length column, enter the value *2*.
     e. Select a dash (-) from the *Separator* dropdown list.
     f. Click *Create new rule*.
     g. Select *Numbers* as the variable for the second input field.
     h. In the *Length* column, enter the value *3*.
     i. Select a period (.) from the *Separator* dropdown list.
     j. Click *Create new rule*.
     k. Select *Numbers* as the variable for the third input field.
     l. In the *Length* column, enter the value *4*.
     m. Select an underscore (_) from the *Separator* dropdown list.
     n. Click *Create new rule*.
     o. Select *Letters, Numbers* as the variable for the fourth input field.
     p. In the *Length* column, enter the value *3*.
   - You enter a regular expression (regex).
     a. Activate the *User-defined structure* checkbox.
     b. Enter the regular expression in the input field below the checkbox.
8. Click *Save*
9. Edit the attributes.
10. Choose which User groups have access to the dimension.

11. Click *Save*.

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

3.8.2 Create *List/Tree* dimension type

You want to create a *List/Tree* dimension type 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. Starting from the top navigation, click > *Planner* > *Settings* > *Dimensions*.
2. Choose *Add new dimension*.

   A dialog box opens.
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 *List/Tree* entry.
6. In the field below, select the entry *Weighted Multiple Selection*.
7. In the *Value* field, enter *Giveaways*.
8. To enter the next value on the sublevel, select:
    - Click > *⁝* > *Add New Sublevel*.
    - Press SHIFT + ENTER.
9. In the new field, type the *Mugs* entry.

10. To enter the next value at the same level, select:
    - In the line of the last value entered, click *> ⁝ > Add new level*.
    - Press ENTER.
11. In the new field, type the *Key rings* entry.
12. To enter the next value at the top level, select:
    - In the line of the first value, click *> ⁝ > Add new level*.
    - Click in the line of the first value and press ENTER.
13. In the new field, type the *Print* entry.
14. Repeat step 8.
15. In the new field, type the *Flyer* entry.
16. Repeat step 10.
17. In the new field, type the *Brochures* entry.
18. To enter the next value at the top level, select:
    - Click in the line of the value *Print > ⁝ > Add new level*.
    - Click in the line of the value *Print* and press ENTER.
19. In the new field, type the *Presentation* entry.
20. Repeat step 8
21. In the new field, type the *Display stands* entry.
22. Repeat step 10.
23. In the new field, type the *Banner* entry.
24. Edit the attributes.
25. Choose which groups have access to the dimension.
26. Click *Save*.

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

3.9 KPIs

You can use KPIs to rate the success of your marketing measures.You set up KPIs *under > Planner > Settings > KPIs*.

Types

You can create three types of KPIs in the Planner:

- Measurement: This value is entered by the user.
- Computed: This value is calculated using the formula that has been defined.
- 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.

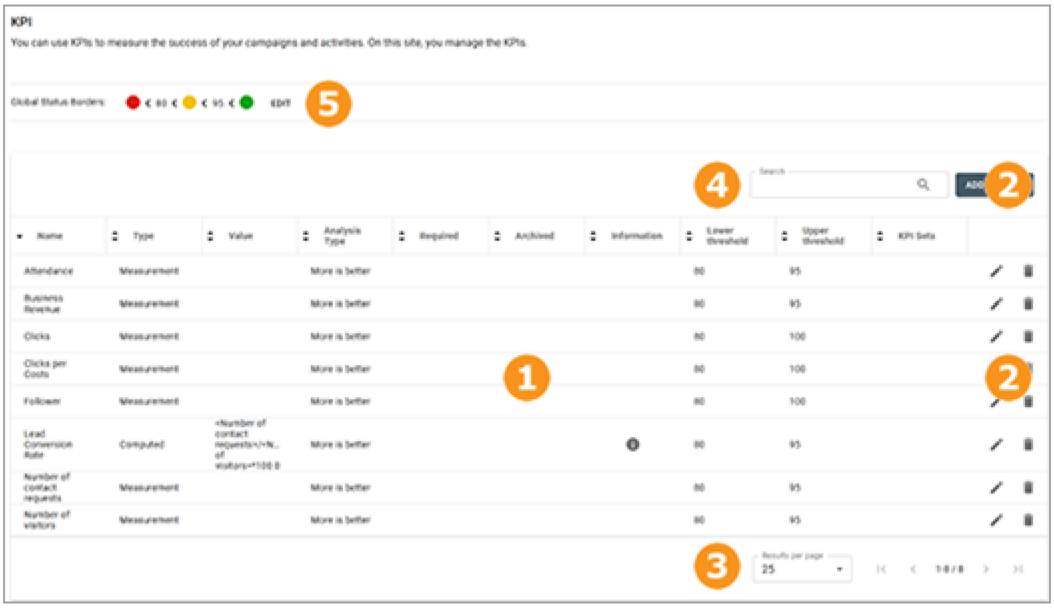
Properties

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 Calculated 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.

Name	Description
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 dropdown list.
Type	Note: The KPI type can only be changed if the KPI has not been used on a planning element. You set the type of the KPI.
Formula	Note: This is visible only if the *Type = Calculated*. 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 corres-pond 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

Name	Description
Status borders	With the status limits you define the percentage values for the traffic light control. Between the status borders, there is always the yellow area of the traffic light. Outside the status borders, the color of the traffic light depends on the setting in the property type of the analysis: • *More is better*: The red area is below the smaller status border, the green area is above the higher status border. • *Less is better*: The green area is below the smaller status border, the red area is above the higher status border. 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 *Apply global value*, you copy the value that you entered under > *Planner* > *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.

Structure of the screen



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 screen (3). Use the arrow keys to navigate through a table with multiple screens.

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*.

Associated tasks

- Example: *Create the Lead conversion rate KPI* on the next page
- *Create KPI set* on page 65

3.9.1 Create the *Lead conversion rate* KPI

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 sent 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 *Lead conversion rate* KPI, 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. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
2. Click *Add new KPI*.

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

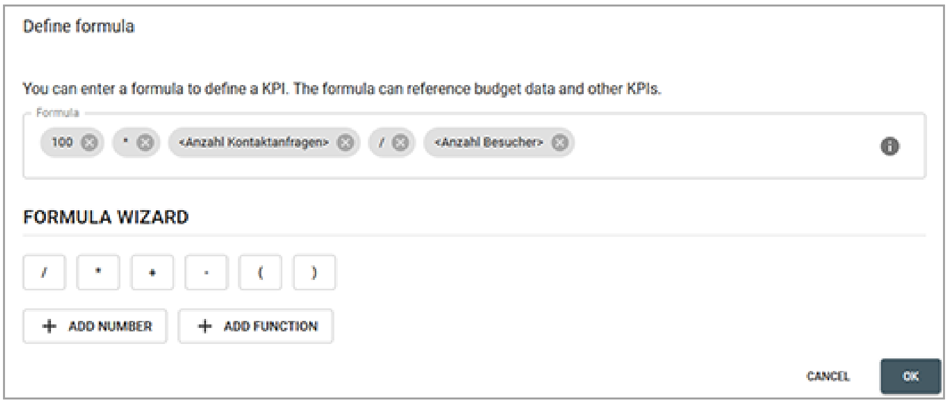
   The dialog box closes.
8. Click *Add new KPI*.

   A dialog box opens.
9. Enter *Number of visitors* as names for the KPI in the input field.
10. Repeat steps 4 to 7.
11. Click *Add new KPI*.

    A dialog box opens.
12. Enter *Lead conversion rate* as names for the KPI in the input field.
13. From the *Type* dropdown list, select the entry *Computed*.
14. Click the *Formula* field.

A dialog box opens.

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*.



    i. Click *OK*.
       The dialog box closes.
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.

3.9.2 Create 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.

Prerequisite: You have created the required KPIs.

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
2. Click the pencil icon in the line of a KPI that you want to assign to a KPI set.

   An editing dialog box opens.
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*.
5. Repeat steps 2 to 4 to assign all of the required KPIs to the set.

You have created a KPI set.

> Note
>
> If you need an overview under > *Planner* > *Settings* > *KPIs* of which KPI sets a KPI is assigned to, show the *KPI Sets* column.

3.10 Currencies & exchange rates

To be able to plan with country-specific currencies, you create the required currencies. To be able to compare planning and results of different countries, create exchange rates. Exchange rates allow you to convert different working currencies into the reference currency.

Currencies

The user can switch between the reference currency and working currencies whenever needed in the budget view. This lets you, e.g. compare campaigns planned for countries with different currencies with a single click.

You can use a currency as:

- Reference currency of a whole year, see *Years* on page 48
- Working currency of a planning element. For more information, refer to the Planner user manual, see *Further documentation* on page 11

Exchange rates

Exchange rates allow conversion between different currencies and are defined per month. Note that in the budget view for data, only a dash is displayed if you display the data in the reference currency but the exchange rate is not defined.

You can always enter a primary exchange rate. In addition to the primary, you can define a secondary exchange rate. This allows departments, for example, to work with different exchange rates. The user can choose between primary and secondary exchange rate with the following functions if the function is enabled:

- When calculating customer-specific budget columns
- When displaying standard budget data in the budget view

To be able to use the secondary exchange rate, activate the function under > *Planner > Settings > Exchange rates* in the *Secondary exchange rate* area. After activation, the value of the primary exchange rate will be applied for the secondary exchange rate first for created exchange rates. In the table below, there is an option to set both the primary and a secondary exchange rate for each working currency.

> **Note**
>
> Note that KPIs and reports are calculated using the primary exchange rate only.

The annual budget in the reference currency for top-down years is calculated using the exchange rate of the first month of the current fiscal 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.

Associated tasks

- *Creating a currency* below
- *Creating an exchange rate* below

3.10.1 Creating a currency

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
2. Click *Add new currency*.
3. A dialog box opens.
4. Define the currency name and currency code.
5. 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.

3.10.2 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.

1. Starting from the top navigation, click > *Planner* > *Settings* > *Categories*.
2. Above the table, 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*.

   A dialog box opens.
4. Select the pivot currency from the *Currency* selection list.
5. Select one of the defined values from the *Units* selection 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*.

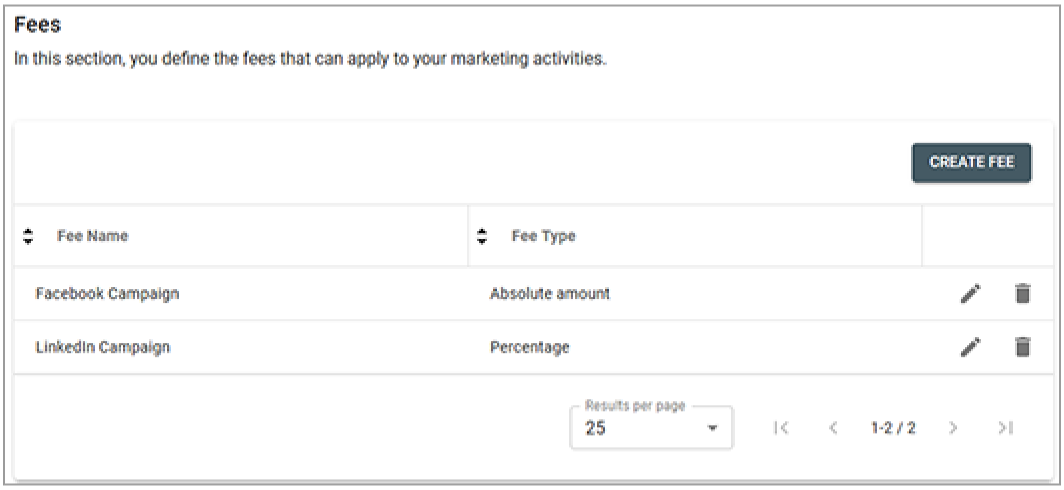
You have created an exchange rate for the selected pivot currency. The budget values defined in the working currency can be converted to the reference currency based on the exchange rate.

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

3.11 Fees

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

As an administrator, you can configure fees globally under > *Planner* > *Settings* > *Fees*. You enter the amount of the fees per month under > *Planner* > *Settings* > *Fee amount*.



Associated tasks

- *Creating a fee* below
- *Editing fees* on the facing page
- *Defining the fee rate* on page 72
- *Deleting a fee* on the facing page

3.11.1 Creating a fee

1. Starting from the top navigation, click > *Planner* > *Settings* > *Fees*.
2. Click *Create fee*.

   A dialog box opens.
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 *Defining the fee rate* on the next page.

3.11.2 Editing fees

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

1. Starting from the top navigation, click > *Planner* > *Settings* > *Fees*.
2. Click the pencil icon next to the fee you want to edit.

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

You have edited the fee.

3.11.3 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. Starting from the top navigation, click > *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.

3.11.4 Defining the fee rate

1. Starting from the top navigation, click > *Planner* > *Settings* > *Fee rate*.
2. Above the table, specify the year and month for which you want to set the fee amount.
3. Click *Enter fee amount*.

   A dialog box opens.
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.

External data 4

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 activate the use of the Planner as your central tool, you can assign resources from the Digital Marketing Center to the planning elements, see *Marketing Planner User Manual*. 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.

Appendix

5

5.1 System Settings

On the > *Administration* > *System Configuration* > *System Settings* screen, you can manage the settings for the following modules

Name	**Description**
Task mode	Select how a task is started: • activated = A task is always created as a job in the module Job Manager. • deactivated = The user decides whether he starts a task in the Marketing Planner or a job in the Job Manager.
Task Reminder	Switch the notification function for tasks on or off.
Task Reminder days before due date	Specify how many days before the due date of a task the notification will be sent.
Task Reminder time	Specify the time of day at which the notification about the due date of a task will be sent. The time refers to the server time.
Deeplinks in e-mails	Turn the deeplink function in e-mails on or off.
Market development funds	Turn the *market development fund* function on or off.
Initially expanded levels of the tree structure	Enter how many levels are displayed as expanded when opened initially. The value is applied for the calendar view and the budget view. If you enter the value 1, then only the root level is displayed.
E-mail type	Select whether the Marketing Planner sends HTML e-mails or text e-mails: • activated = Marketing Planner sends HTML e-mails. • deactivated = Marketing Planner sends text e-mails.
E-mail name	If the Marketing Planner sends a message, then the entered name is used as a placeholder.
External Resources System URL	Enter the URL of the DMC system whose resources are to be assigned to the planning elements in Marketing Planner.

Name	Description
Hide budget settings	Select whether the *Budget* tab is visible in the settings: • activated = The *Budget* tab is hidden. • deactivated = The *Budget* tab is visible. On the tab, the user can activate or deactivate the restriction of budget editing to the lowest level.
Display timeline name in calendar view	Select whether the name of the timeline should be displayed in the calendar view and within the PDF export.
Import available options	Decide whether the user can perform a full import, a delta import, or both when importing budget data.