BrandMaker GmbH

Marketing Planner User Manual

Version 7.2

EN

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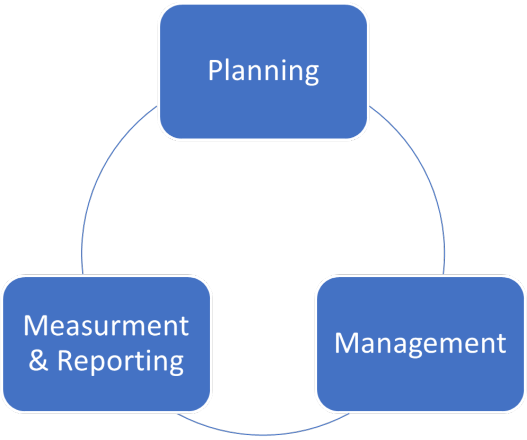
Inhalt

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

Introduction 1

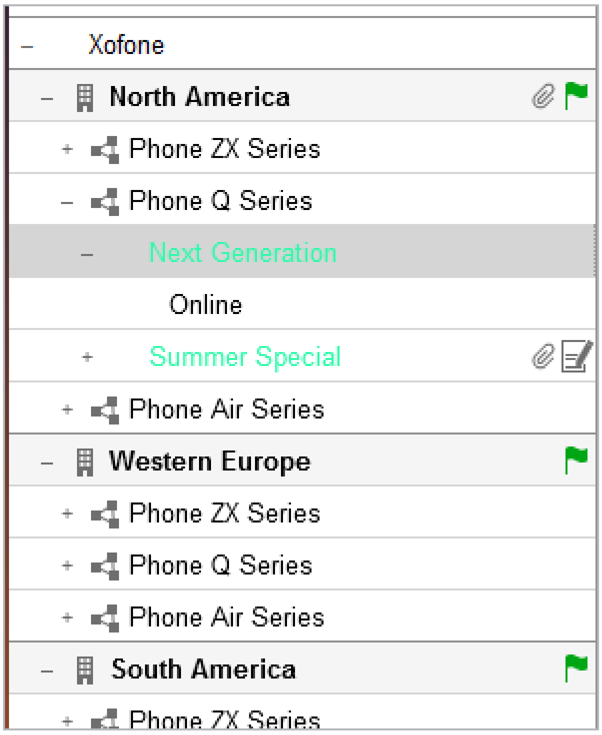
The *Marketing Planner* activates the marketing teams to plan, manage, and measure and report on marketing activities across all regions and channels. As a tool, the module provides full transparency and control over campaign planning and performance measurement for all stakeholders.

In this context, the management of marketing activities is an iterative process in which the main phases of *Planning*, *Management* as well as *Measurement and reporting* alternate again and again:

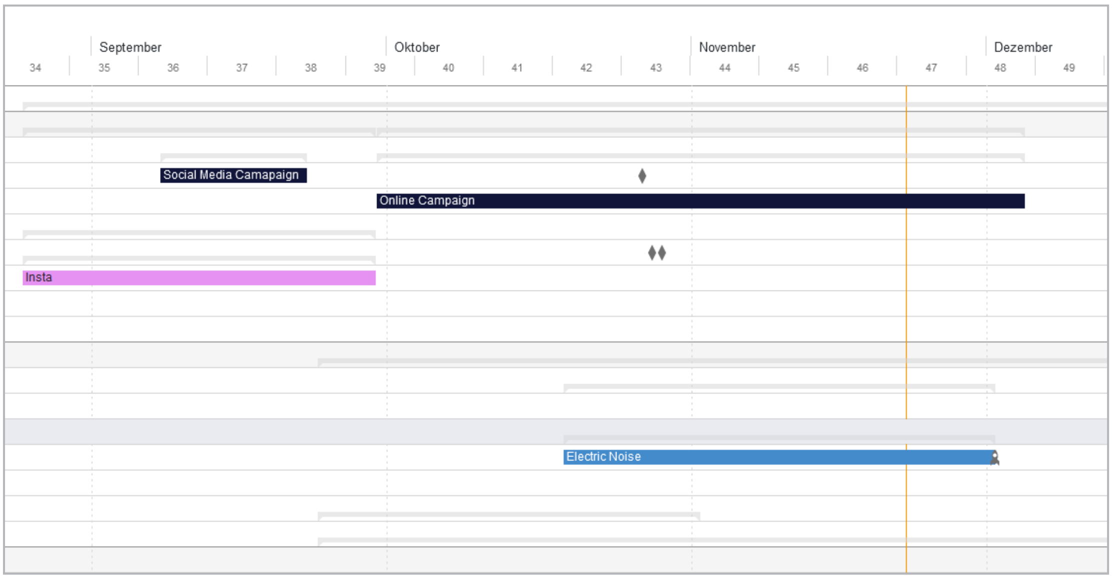


Planning

The first step in planning is to record how your marketing activities are structured (structural planning). This structure takes into account features such as regions, brands and products as well as campaigns or channels.



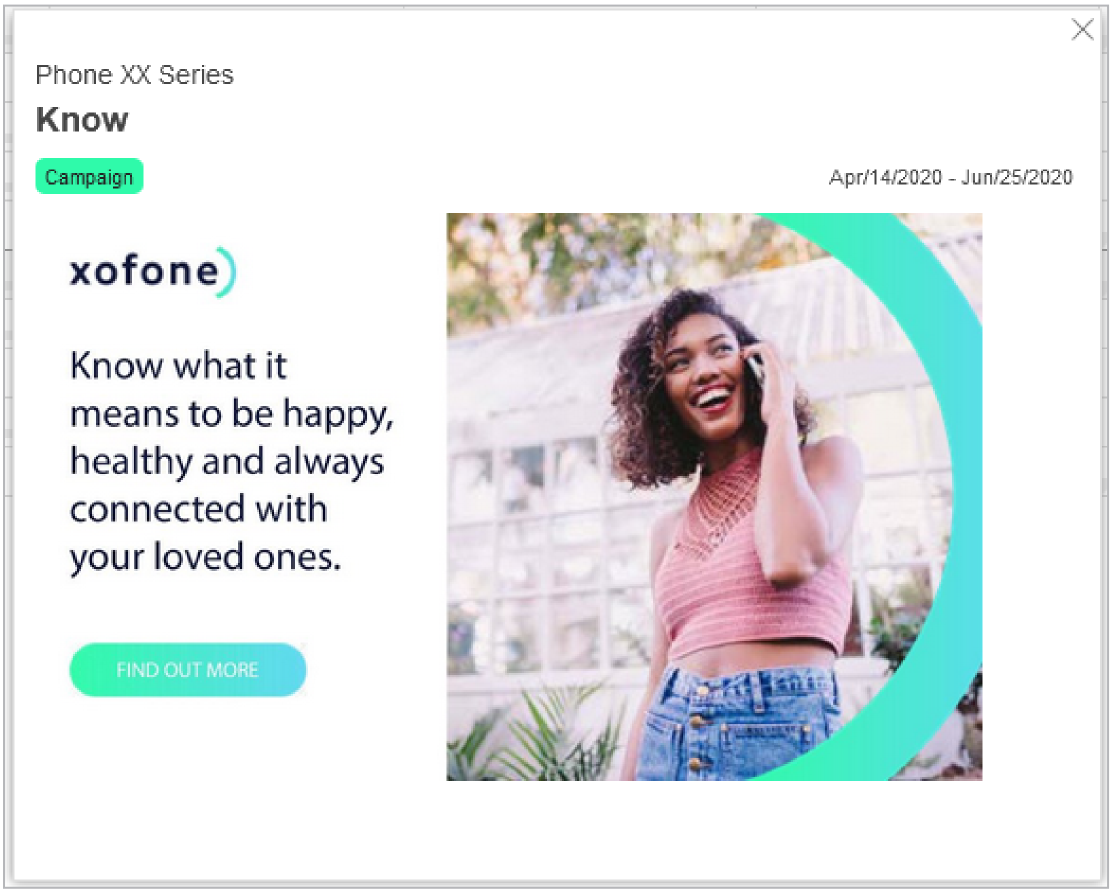
For scheduling, the calendar defines when events and activities take place.



For financial planning, it is possible to record the planned and target budgets for each marketing activity and reschedule them if necessary.

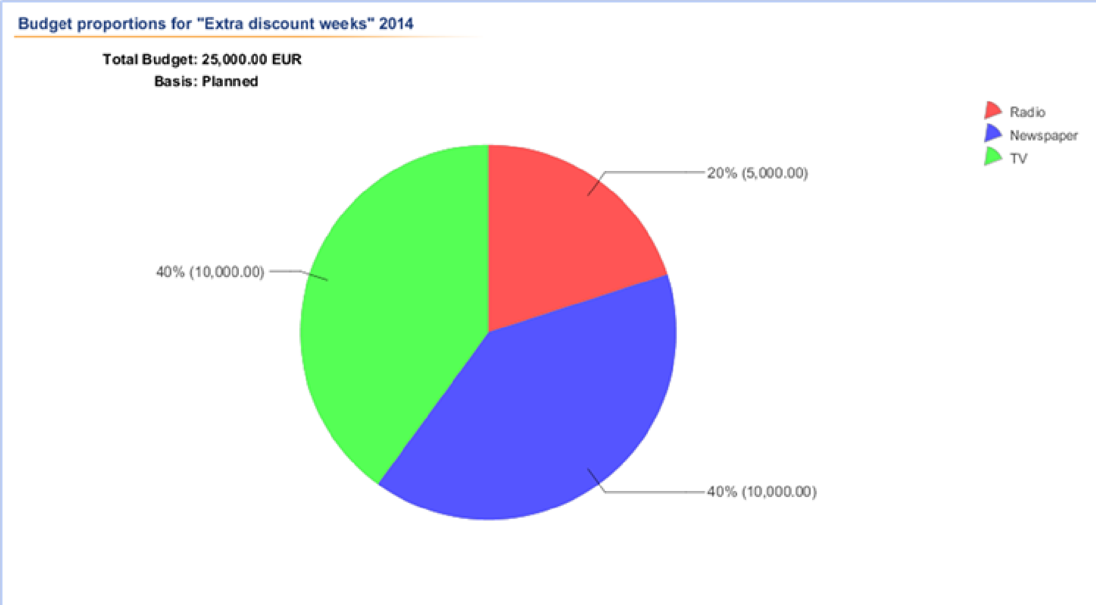
Management

In the management phase, you need to keep track of ongoing activities, manage related POs and invoices, and maintain other costs as necessary. This also takes into account managing processes and keeping colleagues and stakeholders informed of activities:



Measurement and reporting

In this phase, you measure the performance of your activities, evaluate the costs and create reports. This activates you to make a statement about the success of your activities at any time, make new decisions based on this and adjust your planning accordingly.



Structure of this documentation

The structure of this documentation is based on the control phases and conveys the following contents:

- *Structure* on page 21: You will gain an overview of the design and structure of the software. You will learn how to navigate the module and how to access the most important functionalities.
- *Planning* on page 45: You will learn how to plan structurally, with regard to scheduling and financially in the Marketing Planner.
- *Management* on page 101: You will learn how to keep track of your marketing activities and update data accordingly.
- *Measurement and reporting* on page 185: In the last section, you will learn how to evaluate marketing activities.

Recommended for new users

If you are unfamiliar with the module,Marketing Plannerwe recommend that you familiarize yourself with the following topics:

- *Structure* on page 21
- *Planning* on page 45
- *Management* on page 101

For experienced users in a new version

If you are an experienced user and want to have an overview of the new features in the current version,7.2please refer to the Section*New and changed functions* on page 19.

1.1 Navigation to the Planner

You can reach the module via the top navigation. Open the top navigation and click *Planner*.

Note

The module may have been renamed in your system. If you have any questions, please contact your administrator.

1.2 Target group

This manual is intended for users who use the moduleMarketing Plannerto plan marketing activities in terms of scheduling and finance.

Note

You may not be able to access functions or areas described in this manual. This can have two causes: Either your user role lacks the appropriate rights or your company does not use these functions.

If you have any questions, please contact your system administrator.

1.3 New and changed functions

Note that in the moduleMarketing Plannerin the version7.2no new functions were introduced.

1.4 Further documentation

This page provides links to documents containing additional information:

- Administration Manual
- Basic User Guide
- Media Pool User Guide
- Brand Template Builder User Guide

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Structure 2

In this section you will learn how the Planner is structured. We will answer the following questions:

- How do you navigate in the Planner?
- What are the parts of the Planner?
- What are the tasks and functions of these parts?

We will discuss the following chapters in detail:

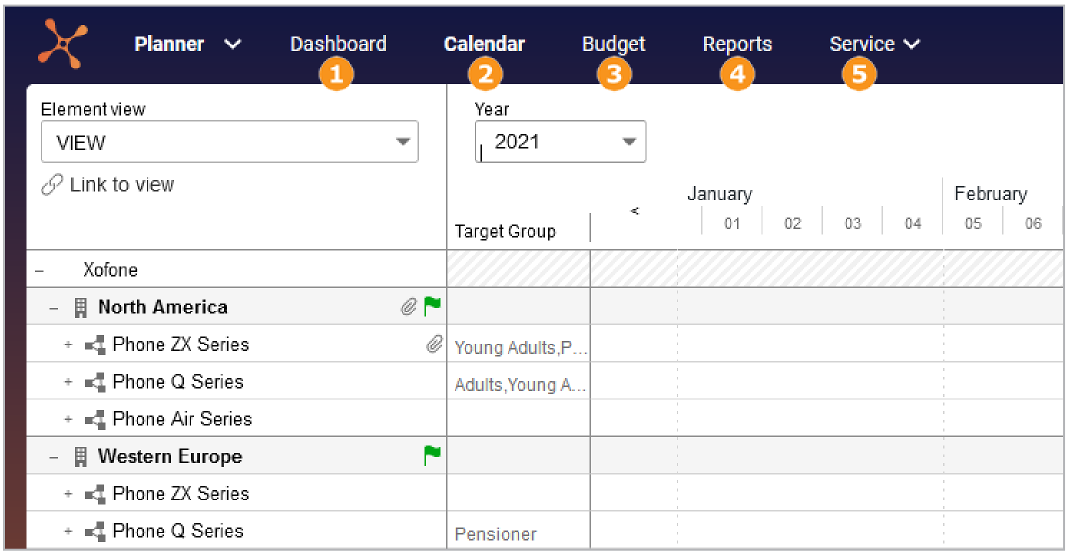
- *Navigating the Planner* on the facing page
- *Dashboard* on page 27
- *Calendar* on page 33
- *Budget* on page 39
- *Detailed view* on page 41

Note

Depending on your role and authorizations in the Planner, you may not see all parts of the Planner that we present here. Contact your administrator if you need different access, if necessary.

2.1 Navigating the Planner

In the Planner, you navigate between the main pages using the module navigation. The module navigation is displayed to the right of the top navigation, and can include, for example, the entries marked by the numbers in the graphic below. Click the entries or the numbers to learn more about the main screens.



Notes

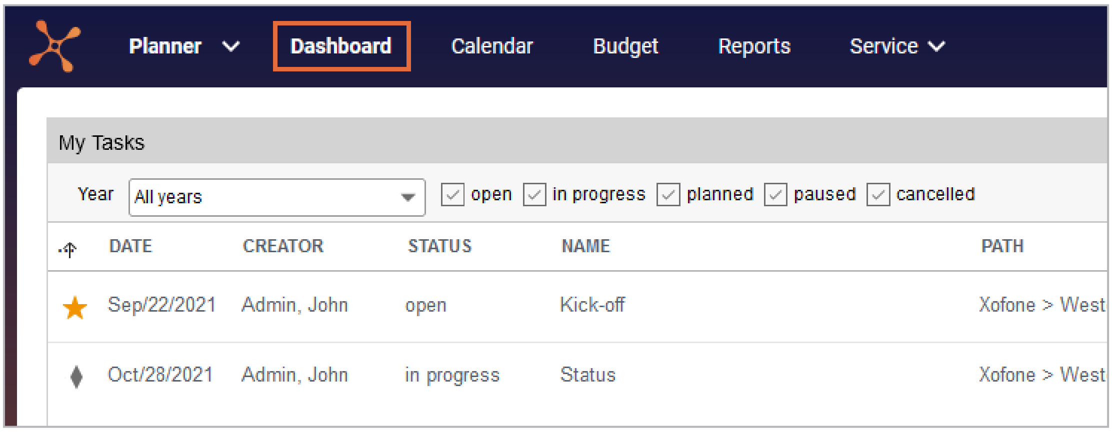
Depending on your tasks in the system, you may not see all or even more entries in the module navigation.

The following entries in the module navigation are not explained within the scope of this overview:

- *Tools*: Import for budget data and the audit log. For more information, see chapter*Importing and exporting budget data* on page 209
- *Users*: Management of users and their access rights to marketing activities and dimensions. More information can be found in the Planner administration manual, see*Further documentation* on page 20.
- *Settings*: Configuration of the Planner. More information can be found in the Planner administration manual, see*Further documentation* on page 20.

These functions are generally reserved for only a few users.

2.1.1 Dashboard

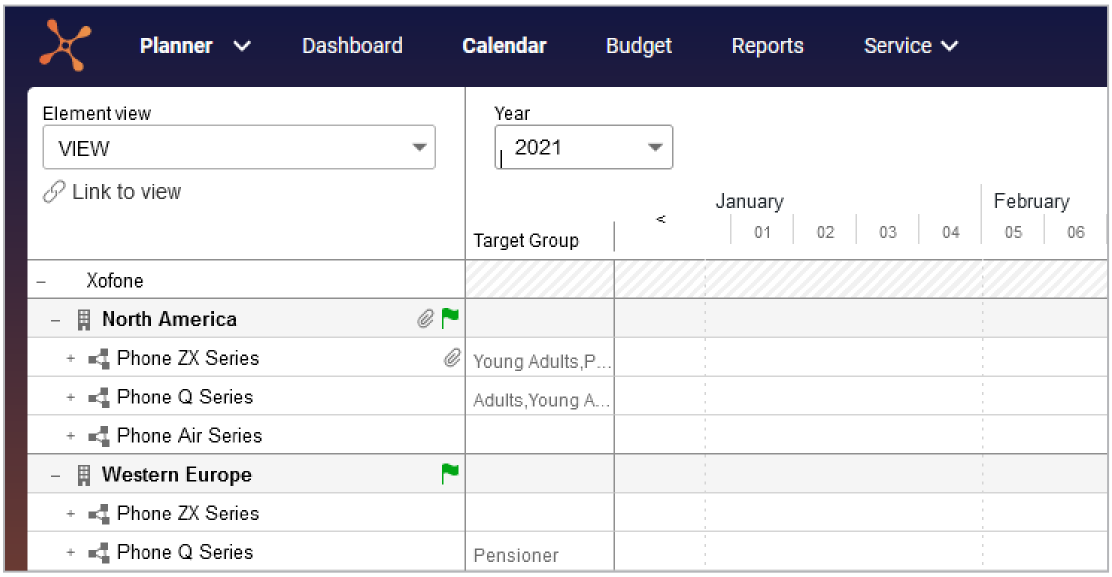


Like a dashboard in a car, the Dashboard displays important information about the individual marketing measures.

For more information, see chapter*Dashboard* on page 27.

Back to overview

2.1.2 Calendar



The calendar is where the scheduling takes place, i.e. you set the time periods and events for each marketing activity. The structure of your marketing activities can also be created here.

For more information, see chapter*Calendar* on page 33.

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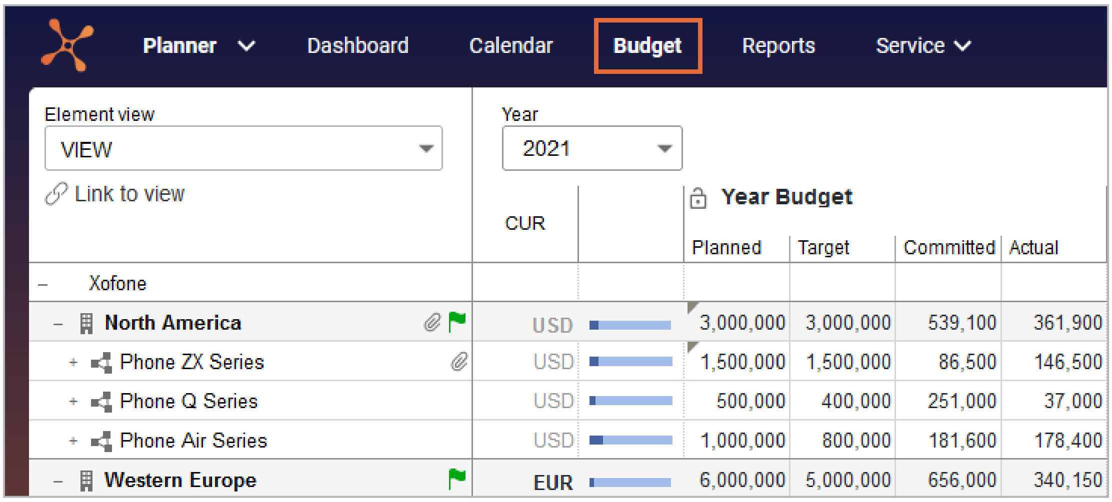
2.1.3 Budget



The budget area contains the financial data, from the planning as well as from the execution phase, for example orders and invoices. Just like in the calendar, the structure of your marketing activities can be created here.

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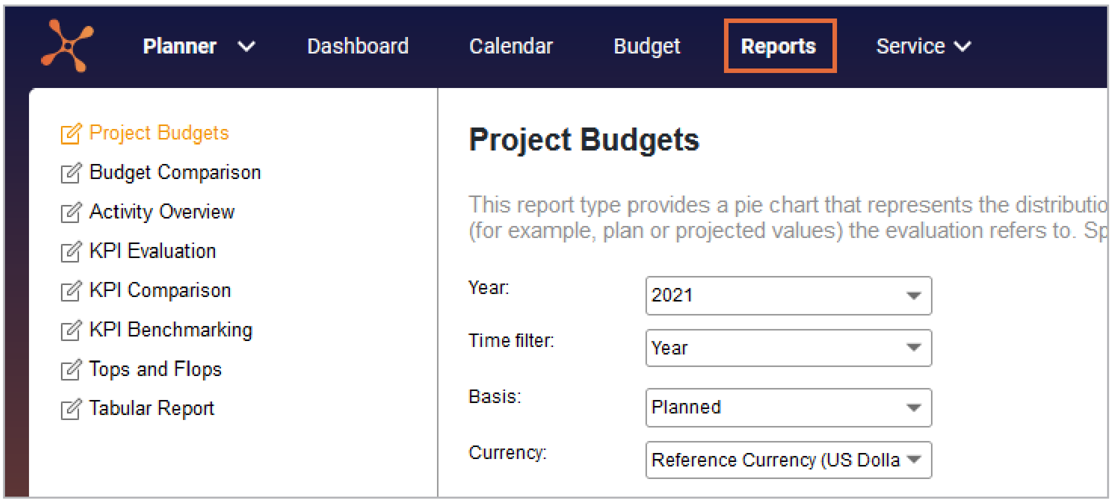
2.1.4 Report



In order to create descriptive reports, you can access various diagram formats in this area, with which you can display important key figures for your reporting.

For more information, see chapter*Reports and graphics* on page 196.

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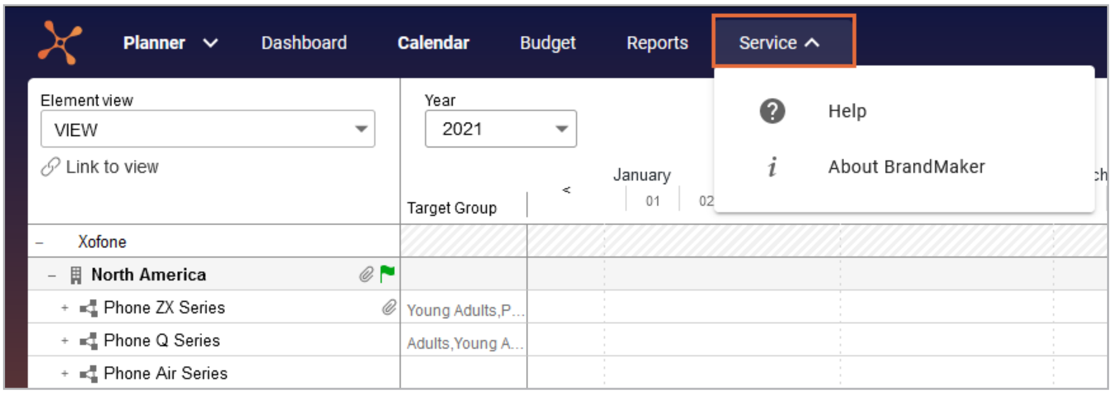
2.1.5 Service menu



Open the Service menu to get more information about the Planner. For example, your administrator can provide links to this Help or further information here.

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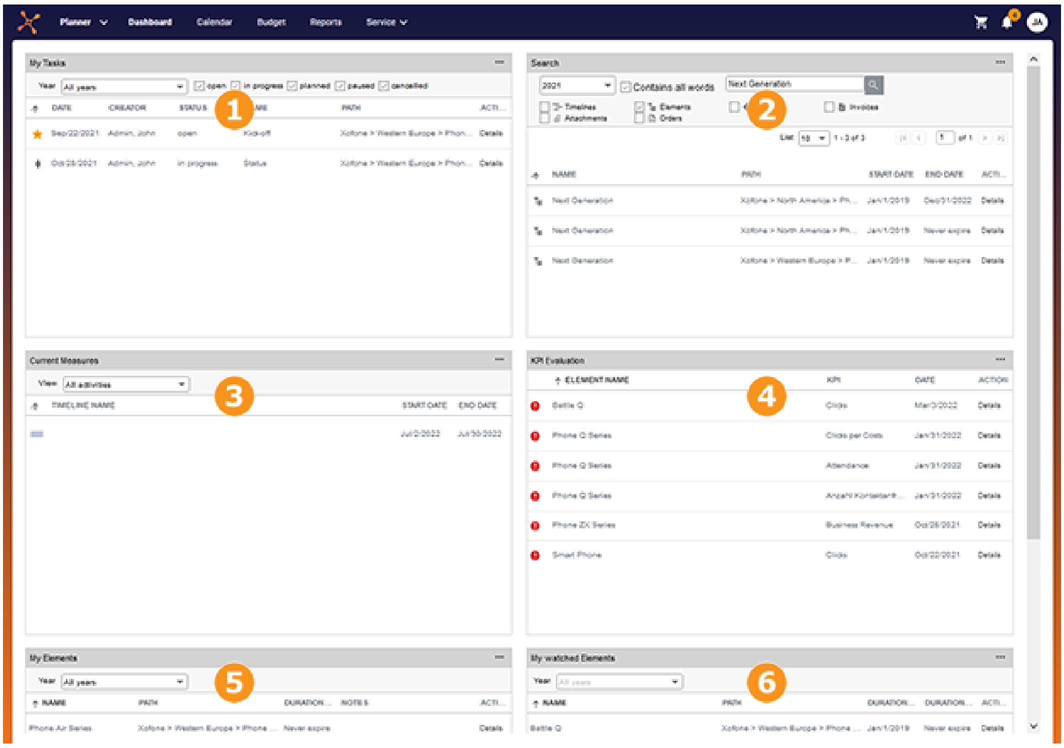
2.2 Dashboard

Like a dashboard in a car, the Dashboard displays important information about the individual marketing measures.

The dashboard consists of several areas, which are called dashlets.

Click the numbers in the screenshot to learn more about each dashlet.

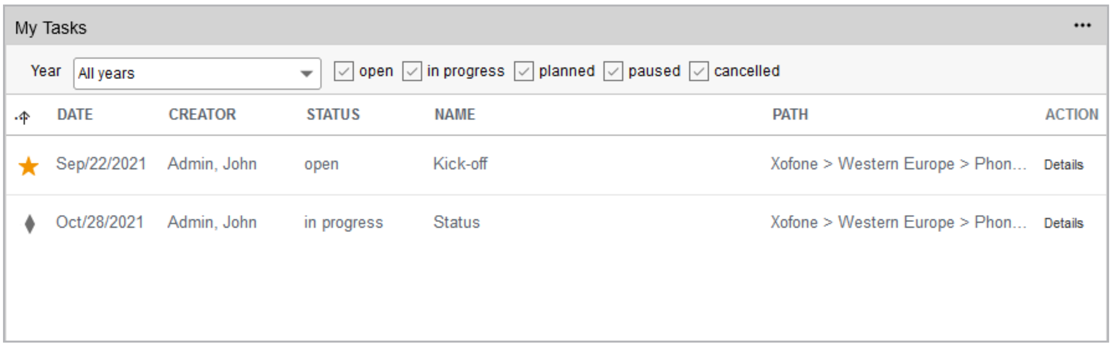


> **Note**
>
> The order of the dashlets and the dashlet displays may be different from the screenshots displayed here.

For information about changing the display of the dashboard and dashlets, see chapter *Customize dashboard* on page 31.

2.2.1 My Tasks

This dashlet helps you keep track of your tasks in the Planner: You can see the tasks assigned to you and those not yet completed. 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.

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

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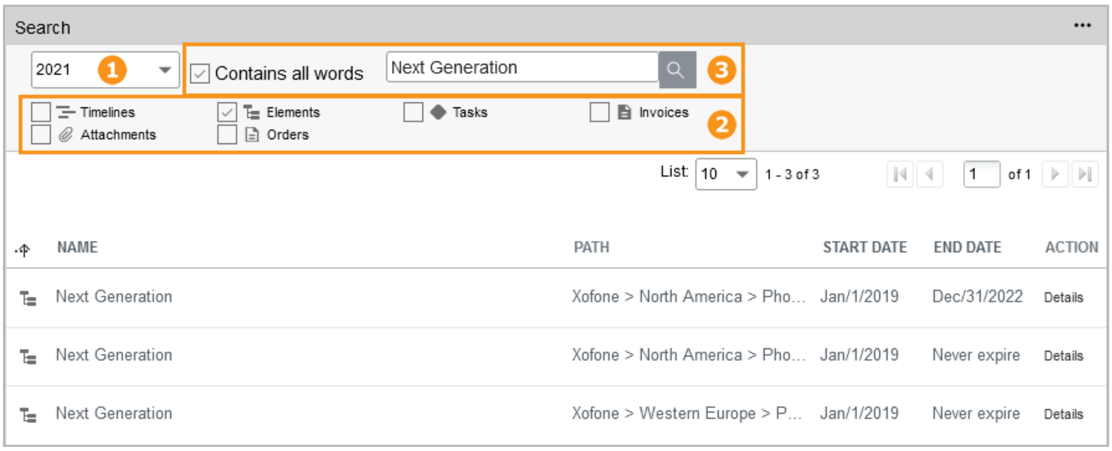
2.2.2 Search

With this dashlet you can find various objects in the Planner. You can search for elements, timelines or attachments, for example.



- 1: If you want to limit your search to objects of a certain year, select the year in the selection list.
- 2: Activate the checkboxes of the items you are looking for.
- 3: Enter one or more keywords. If you enter multiple search words, use the *Includes all words* 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.

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2.2.3 Current Measures

This dashlet allows you to keep track of upcoming marketing activities. It displays all the elements for which timelines are planned and/or taking place during the next 14 days.

You can use the dropdown list above the table to display the timelines assigned to you or all timelines which are visible to you.

Click *Details* to open the *Edit timeline* dialog box and the detailed view of the element on the *Timelines* tab.

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2.2.4 KPI evaluation

This dashlet makes it easier for you to evaluate your marketing activities. The dashlet displays KPIs whose evaluation is overdue ( ) or must be carried out within five days at the latest ( ). Only the KPIs of elements that you can access are displayed.

Click *Details* to open the detailed view of the element on the *General* tab. You can use the *Year* filter above the table to limit the view to elements from specific years.

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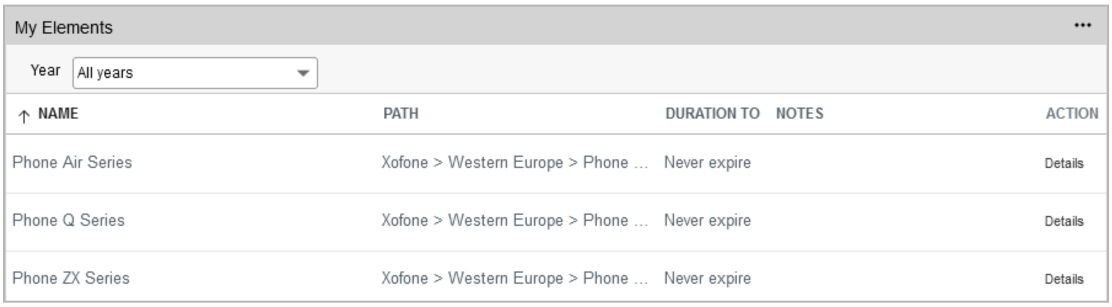
2.2.5 My elements

This dashlet displays the elements for which you are responsible.



↑ NAME	PATH	DURATION TO	NOTES	ACTION
Phone Air Series	Xofone > Western Europe > Phone ...	Never expire		Details
Phone Q Series	Xofone > Western Europe > Phone ...	Never expire		Details
Phone ZX Series	Xofone > Western Europe > Phone ...	Never expire		Details

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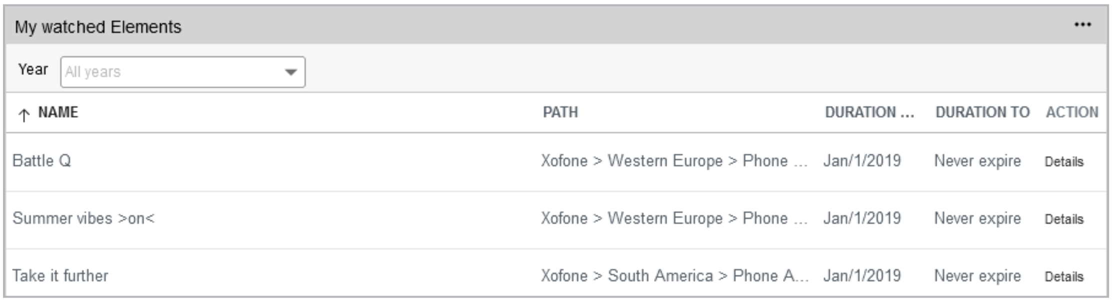
2.2.6 Watched elements

The dashlet lists the planning elements you have observed.



↑ NAME	PATH	DURATION ...	DURATION TO	ACTION
Battle Q	Xofone > Western Europe > Phone ...	Jan/1/2019	Never expire	Details
Summer vibes >on<	Xofone > Western Europe > Phone ...	Jan/1/2019	Never expire	Details
Take it further	Xofone > South America > Phone A...	Jan/1/2019	Never expire	Details

The table lists the observed 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.

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2.2.7 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.

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2.2.8 Customize dashboard

You can customize the dashboard display and dashlets to suit your needs. Your settings are saved for you Individually and can be changed again at any time.

More button

At the bottom of the dashboard you will find the More button. The button opens a drop-down list that allows you to choose the following settings:

- One-column or two-column display of the dashlets
- Height of the dashlets: The small dashlet size is the default. The middle size is 1.5 times and the large size is twice the size of the small dashlet size.
- Reset to factory default: This changes the columns in the dashboard, the arrangement and size of the dashlets, and the colors of the title bars. 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.

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.

Dashlet tables

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

- *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* or *Sort descending*.

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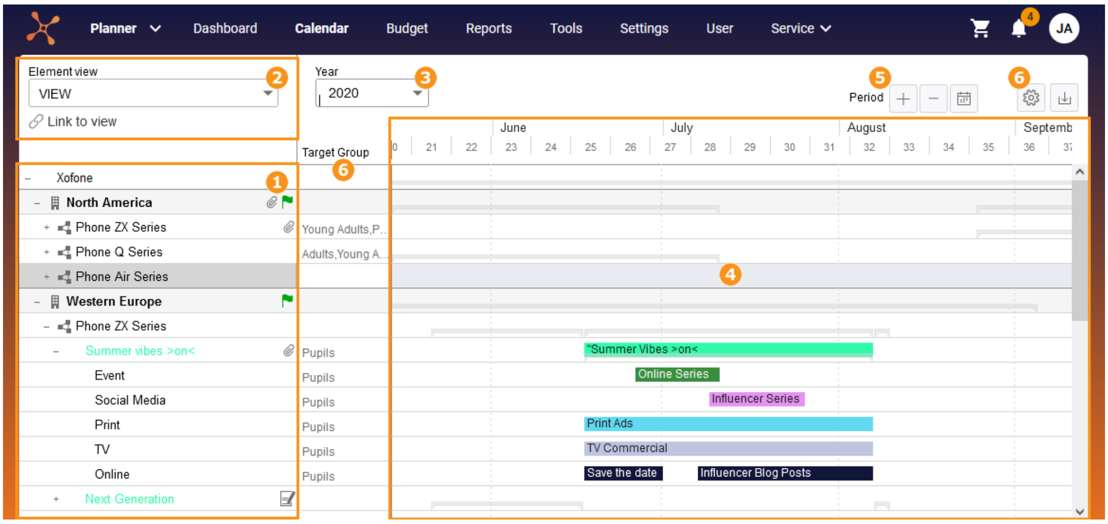
2.3 Calendar

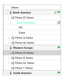
The calendar is where the scheduling takes place, i.e. you set the time periods and events for each marketing activity. The structure of your marketing activities can also be created here.

Click the numbers in the image below for more information about the areas.



2.3.1 Structure of your marketing activities

You map your marketing activities in the tree structure with planning elements. In the following example, you can see the *Company* (as root element) - *Region* - *Product* - *Campaign* - *Channel* levels.



If you click on an element, subordinate elements are expanded or collapsed. The definitions for the structure, the color display and the use of the icons is probably defined differently for your company. If you have any questions, please contact your administrator.

> **Note**
>
> If you are not an administrator, you will probably not reach all marketing activities, but only a selection.

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In structural planning you will learn how to define or plan the structure*Structural planning* on page 48.

2.3.2 Filtering and sharing

In this area you will find two essential functions for the planning elements:

- You filter the planning elements that are accessible to you and thus achieve a simplified view. You will learn how filtering works in chapter*Filtering and sorting elements* on page 104.
- You generate a link to the current view of the planning elements in the calendar. You can share the link with other users or call it up from the *Dashboard* module, for example, to get simplified access to selected elements. For more information, see chapter*Share view* on page 114.

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2.3.3 Fiscal year

In this dropdown list you choose which fiscal year the calendar displays. Planning elements are always created for a certain term, at least for one fiscal year. If required, you can create planning elements with a term of several years or even without a fixed end.

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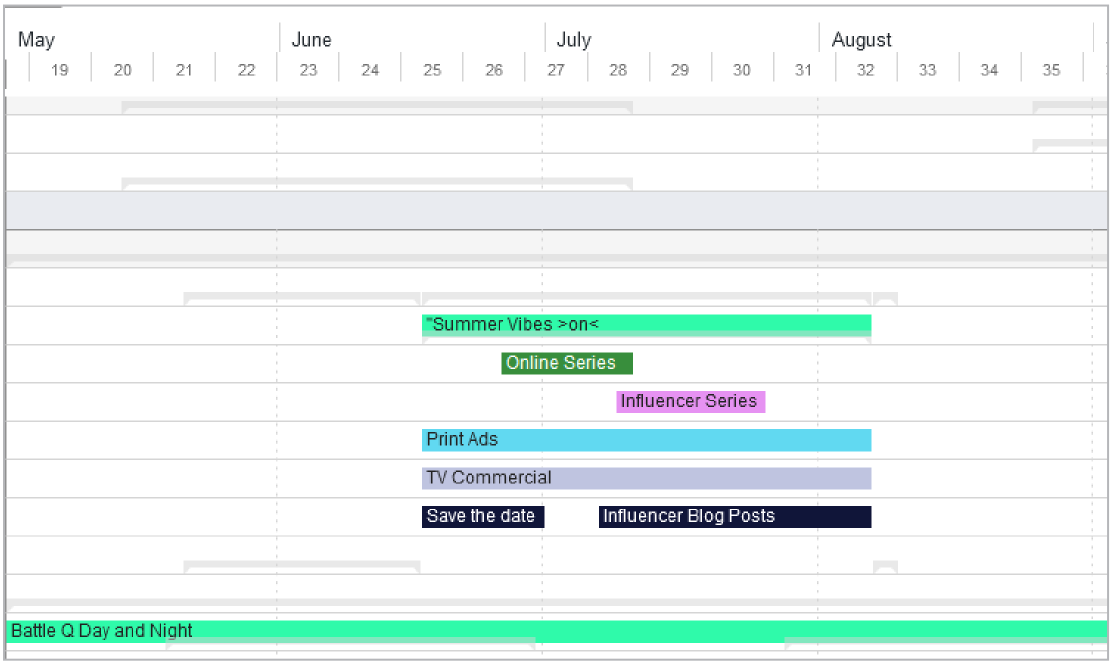
2.3.4 Calendar

In this area you can see the timelines and tasks entered for the marketing activities in a calendar structure. The color scheme represents different types of timelines, e.g. campaigns are shown in green in the screenshot below. Note that the color scheme depends on what settings have been made for your system. Please contact your administrator if you have any questions.

The gray bars mark the timelines in the line of the parent planning element. This way, even if the subordinate elements in the tree are not open, you know whether planning exists at a certain point in time, for example for a product.

Tasks are represented by an icon.



If you have opened the current fiscal year, the current day is highlighted by a vertical red line.

You will learn how to create timelines and tasks in chapter*Scheduling* on page 71.

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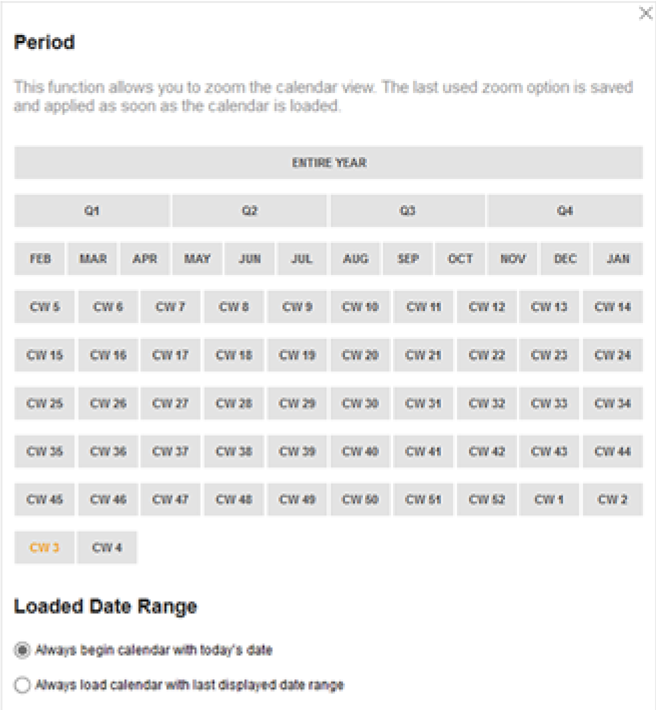
2.3.5 Time period displayed

With these functions you influence, with which granularity and in which time period the calendar is displayed.

- : This zooms in the view in stages, i.e. the calendar displays a shorter time period. You can zoom up to the day level.
- : This zooms the view out in stages, i.e. the calendar displays a longer time period.
- : You call up the following described dialog box. The dialog box allows you to directly select a time period and specify with which time period the calendar will be opened.



Selectable time periods

- *Entire year*: You see the entire year.
- *Q1* to *Q4*: You see the selected quarter. If the browser window is large enough, Q1 to Q3 are displayed left-aligned, Q4 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 with the month of *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 *March*.

- 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.

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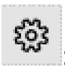
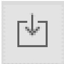
2.3.6 Displayed information and export

In this area you can access additional information:

- : Select 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
    - Runtime
    - External ID
    - Element ID
    - Element type
    - Element notes (See the detailed view of the *General* tab)
    - Dimensions

- : You export the current planning. For more information, see chapter*Export planning data* on page 192.

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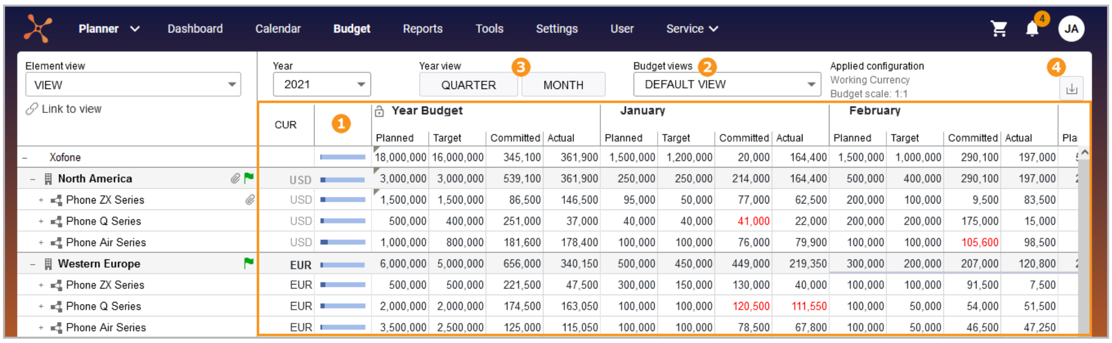
2.4 Budget

The budget area contains the financial data, from the planning as well as from the execution phase, for example orders and invoices. Just like in the calendar, the structure of your marketing activities can be created here.

Note that the structure of the marketing activities, the functions for filtering and sharing, and the selection of the fiscal year are identical to the calendar. Click the preceding links if you need more information.



In the main area 1, you can see the budget data of the marketing activities. You enter planned values here. The actual values (invoices) or POs are displayed in the*Detailed view* on page 41captured for each element. Note that the screenshot above shows the default view. You can select other views in the budget views 2 drop-down list. 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. In addition, you can determine whether the changeover of the year view is possible and whether the configuration used is displayed.

If you display monthly data, you can aggregate them to quarterly values using the *Quarter* (3) button.

Note

You cannot enter planned values in the quarterly view . The totals of the three months are displayed in the quarter instead.

If you click the button (4), you will reach the export function for the budget. This exports the whole view or current view as an Excel file. You can decide whether changes are highlighted. The export can be downloaded or sent by e-mail.

Note

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

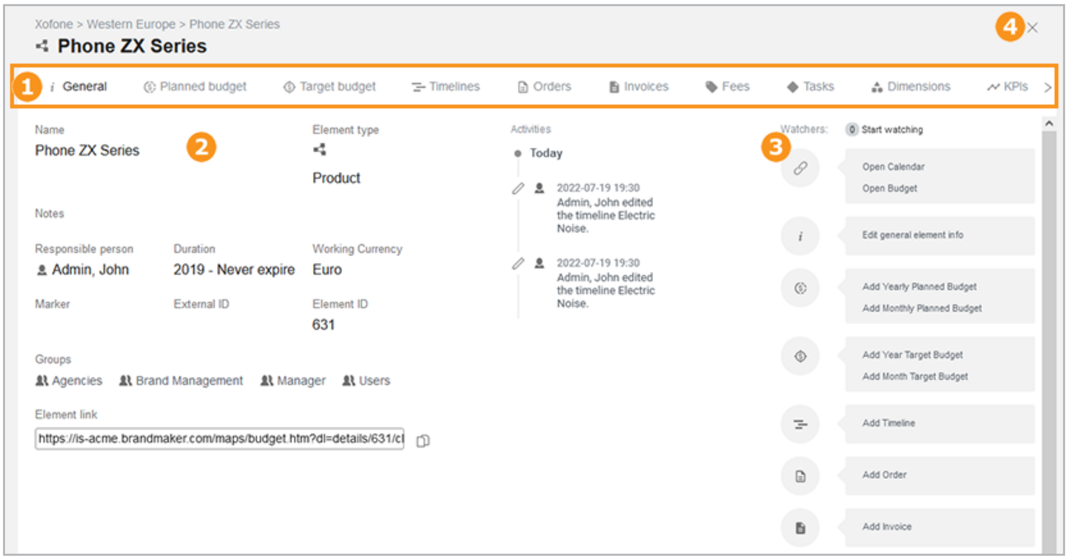
2.5 Detailed view

You find all relevant information for a planning element in the detailed view. You open the detailed view either in the calendar or in the budget area:

- Double-click on the corresponding element
- Right-click on the element; select *Details* in the context menu

The detailed view is opened with the *General* tab. This tab is always present and contains the basic data about the planning element:

Click the numbers in the screenshot to learn more about the detailed view.



2.5.1 Tabs in the detailed view

Below the name of the planning element, you can see the tabs that you can access based on your permissions.

> Note
>
> You will probably see fewer tabs than shown in the overview screenshot. Reasons for this are that your company may not use all the features or you may not have access to all the tabs used due to your role. You may also have only read but no write permissions.

Important tabs

- *General* and *Dimensions*: The *General* tab contains the basic data of the planning element, for example the currency in which the element is budgeted and the responsible person. With the dimensions you characterize the planning elements and assign characteristics to them. For more information, see*Structural planning* on page 48.
- *Timelines* and *Tasks*: These tabs contain the data for scheduling the elements. For more information, see*Scheduling* on page 71.
- *Target budget* and *Planned budget*: On these tabs you get all data for financial planning, see*Financial planning* on page 93.
- *POs*, *Invoices* and *Fees*: On these tabs you manage the financial data for the implementation of marketing activities. For more information, see*Expenses* on page 150.
- *KPIs*: On this tab you evaluate the planning element and the execution of the activities. For more information, see*Measure target achievement* on page 187.

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2.5.2 Tab data

This area displays the data of the selected tab, in the overview this is the *General* tab.

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2.5.3 Quick access to actions

To be able to perform important actions quickly, you can reach the most important actions on the right side of the detailed view. Instead of first switching to the corresponding tab and clicking the corresponding button there, you can reach

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the dialog box for adding an order or an invoice, for example, in one step.

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2.5.4 Close detailed view

The detailed view is displayed in full screen mode. To close the detailed view, click the X. The page where you opened the detail view will then be displayed.

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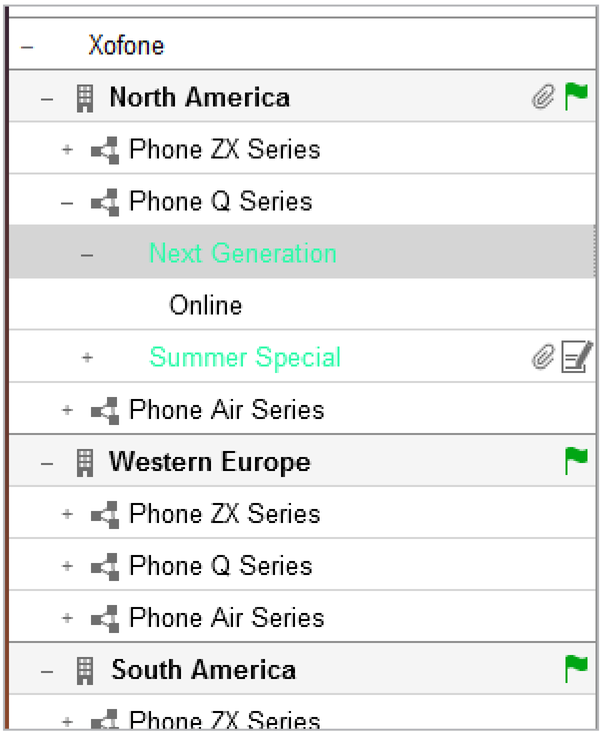
This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

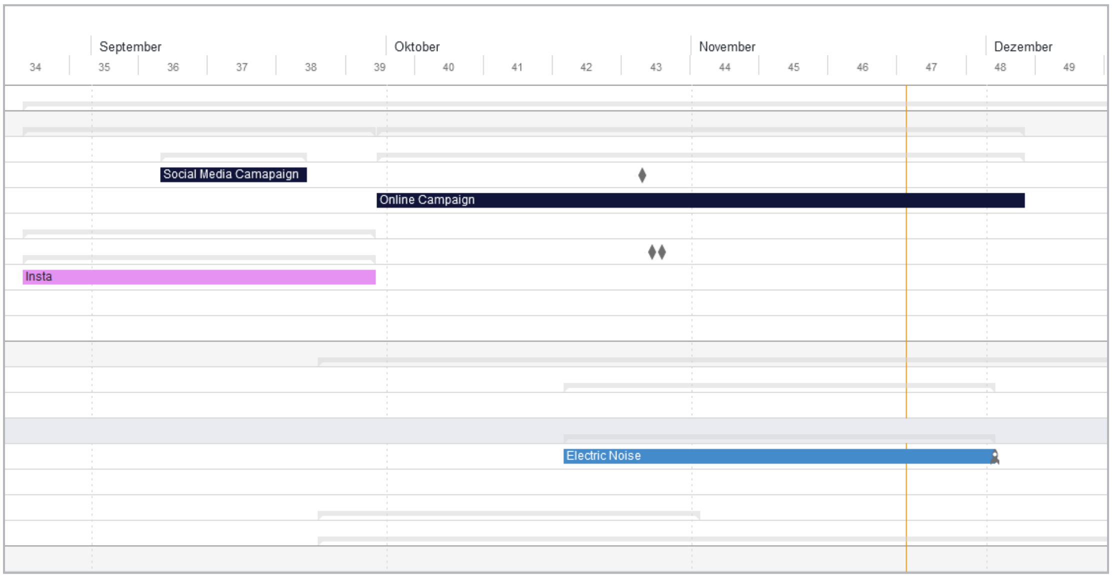
Planning

3

The first step in planning is to record how your marketing activities are structured (structural planning). This structure takes into account features such as regions, brands and products as well as campaigns or channels.



For scheduling, the calendar defines when events and activities take place.



For financial planning, it is possible to record the planned and target budgets for each marketing activity and reschedule them if necessary.

This chapter consists of the following sections:

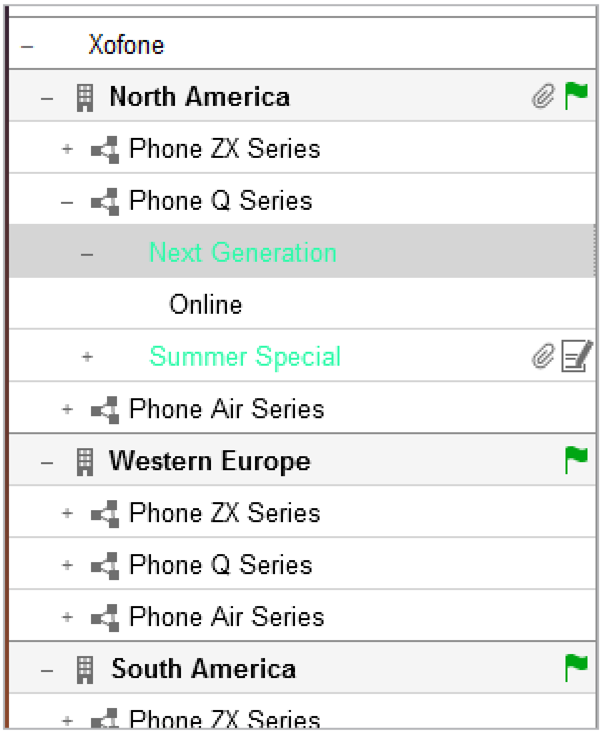
- *Structural planning* on the next page: In the Planner, your marketing activities are represented by planning elements in a hierarchical structure. In this section you will learn about the properties of planning elements and how to manage planning elements. Structural planning must be carried out in any case and is the prerequisite for scheduling or financial planning.
- *Scheduling* on page 71: The time when the marketing activities take place is represented in the calendar by timelines and tasks. You will get to know the calendar with its functions for scheduling and learn how to manage timelines and tasks.
- *Financial planning* on page 93: For financial planning, you enter planned and target budgets for the marketing activities. In this chapter you will learn how to enter the data and how to change it if necessary.

3.1 Structural planning

In the Planner, your marketing activities are represented by planning elements in a hierarchical structure. In this section you will learn about the properties of planning elements and how to manage planning elements. Structural planning must be carried out in any case and is the prerequisite for scheduling or financial planning.

Planning elements

Planning elements are the individual parts of your marketing planning. In the tree structure, each entry is a planning element and due to the hierarchical structure, the elements represent structures such as *Campaigns - Projects - Channels* or *Country subsidiaries - Products - Campaigns*.



> **Note**
>
> The structures that are mapped in your Planner depend on the setup in your system. If you have any questions, please contact your administrator.

Basic attributes

attribute	Description
Name	Designation of the planning element with which the element is represented in the tree structure, for example.
Element type	By assigning a type to an element, you characterize the element and can - depending on the set-up of your system - achieve a visual distinction from other elements in the tree structure. Possible visual distinctions are, for example, the display of icons or different text colors.
Notes	If required, additional information can be stored in this attribute, which is necessary for correct processing of the element.
Responsible person	If a user of the planner is responsible for the administration of the planning element, this user can be entered in this attribute.
Runtime	With the runtime, you determine in which financial years a planning element exists. An element that represents a product series, for example, may have a runtime of several years. In contrast, an element representing a one-off campaign will only have a runtime over the year in which it is carried out. Note: The runtime of a parent element always includes the runtimes of all child elements. For example, if you shorten the runtime of a parent element, the runtimes of all child elements are automatically shortened as well. Conversely, if you create a child element with a longer runtime, the runtimes of parent elements are automatically extended.
Working currency	This attribute defines the currency in which the element is financially planned. If exchange rates are created, you can display the budgeting of the element in the reference currency. This allows you to compare elements that are planned in different working currencies. 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	Markers are used to clarify facts and the status of elements. The markers are displayed, for example, in the tree structure to the right of the name. How your company uses the markers can be freely determined. Contact your system administrator if you have any questions.
External ID	The external ID can be defined by your company. Note that this ID must be unique among all elements.

attribute	Description
Element ID	The element ID is automatically set when the planning element is created and cannot be changed.
Groups	Probably only a few users will access all planning elements in your system. In most systems, access to the elements is divided according to criteria such as responsibility for product areas or regions. The *Group* attribute shows for the element which groups have access to it.

Further data of a planning element

Planning elements are assigned further data:

- 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 and managed by an administrator. If you have any questions, please contact your system administrator.
  For more information, see chapter*Filling in dimensions* on page 57.
- Timelines and tasks: For scheduling, enter timelines and tasks for the element. For further information, see*Scheduling* on page 71.
- Budget data: For financial planning, assign planned and target budgets to the elements. For more information, see the chapter *Financial planning* on page 93.
- POs, invoices and fees: When managing expenses, enter them as POs, invoices and fees for an element. If applicable, you can also apply for an advertising grant. For more information, see chapter *Expenses* on page 150.
- KPIs: To evaluate your marketing activities, record results and measurements in KPIs. KPIs are set up specifically for your system and managed by an administrator. If you have any questions, please contact your system administrator.
  For more information, see chapter*Measure target achievement* on page 187.
- Attachments and comments: Files relevant to the management of an element can be attached to the planning element. If needed, users with access to an element can use the comment function to share more inform-

ation or discuss the element with other users. For more information, see chapter *Annotate* on page 117.

Associated tasks

Create structure:

- *Create child planning element* below
- *Create planning element on the same level* on the next page
- *Create a planning element in a filtered view* on page 53
- *Copying and pasting a planning element* on page 55

Characterize and describe planning elements:

- *Filling in dimensions* on page 57
- *Highlighting an element* on page 63

Change existing structure of the planning elements:

- *Cutting and pasting an element* on page 66
- *Moving an element* on page 67

Edit the structure of the planning elements:

- *Deleting an element* on page 69
- *Deleting multiple elements* on page 69

3.1.1 Create child planning element

Prerequisite:Your view in the calendar or budget view is not sorted. You can get details about sorting in Filtering and sorting elements on page 104.
If the view is filtered, the following description deviates, please note Create a planning element in a filtered view on page 53.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.

2. Navigate in the tree structure to the element under which you want to create the new element.

3. Right click this element and select *New sub-element XXXX* from the context menu.
   The *XXX* entry depends on the settings in your system and characterizes the different levels in the tree structure.

   The *Create New Element* dialog box appears.
4. Enter an element name.
5. Optional: Choose an element type.
6. Click *Create and open*.

   A new element is inserted below the selected parent element. The detailed view is opened with the *General* tab.
7. Click the *Edit general element info* button in the *Quick actions* column.

   The *Edit general element info* dialog box will open.
8. Edit the basic attributes of the element. For details, see chapter *Structural planning* on page 48.
9. Click on *Save*.

   The dialog box will close.
10. Click *X*.

The detailed view of the element is closed. You have created the planning element and edited its basic attributes.

3.1.2 Create planning element on the same level

Prerequisite:Your view in the calendar or budget view is not sorted. You can get details about sorting in ;Filtering and sorting elements on page 104.
If the view is filtered, the following description deviates, please note Create a planning element in a filtered view on the facing page.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. Navigate in the tree structure to the element for which you want to create a new, subsequent element on the same level.
3. Right click this element and select *New Element XXXX* from the context menu.
   The *XXX* entry depends on the settings in your system and characterizes the

different levels in the tree structure.

The *Create New Element* dialog box appears.

4. Enter an element name.
5. Optional: Choose an element type.
6. Click *Create and open*.

   The new element is inserted after the source element. The detailed view is opened with the *General* tab.

7. Click the *Edit general element info* button in the *Quick actions* column.

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

8. Edit the basic attributes of the element. For details, see chapter *Structural planning* on page 48.
9. Click on *Save*.

   The dialog box will close.

10. Click *X*.

The detailed view of the element is closed. You have created the planning element and edited its basic attributes.

3.1.3 Create a planning element in a filtered view

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
- Lowest tree level

> 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.

Create a planning element in a filtered view

Prerequisite: Your view in the calendar or budget view is not sorted. You can get details about sorting in *Filtering and sorting elements* on page 104.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.

2. Navigate in the tree structure to the element from which you want to create the new element.

3. Right click this element and select *New sub-element XXXX* or *New element XXXX* from the context menu. For the differences, see the chapters*Create child planning element* on page 51and*Create planning element on the same level* on page 52.
   The *XXX* entry depends on the settings in your system and characterizes the

different levels in the tree structure.

The *Create New Element* dialog box appears.

4. Enter an element name.
5. Optional: Choose an element type.
6. Select whether certain properties of the element are preassigned with values of the current filter. If no preassignment is to take place, deactivate the slide switch.
7. If a preassignment 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*.

   According to your action a new element will be inserted. 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. Edit the basic attributes of the element. For details, see chapter*Structural planning* on page 48.
12. Click *Save*.

    The dialog box will close.
13. Click *X*.

The detailed view of the element is closed. You have created the planning element and edited its basic attributes.

3.1.4 Copying and pasting a planning element

You can copy one or more elements completely, including its sub-elements, and paste it as new planning elements. While copying it, you specify which attachments (such as timelines, tasks, or file attachments, for example) are to be copied.

Note

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*POs* on page 153.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

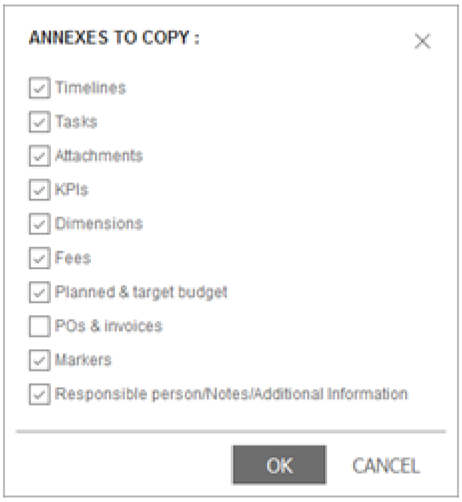
   You switch to the selected view. The tree structure is displayed.

2. In the tree structure, navigate to an element that you want to copy.
3. If you want to cut and paste multiple elements, select the elements:
   - Hold down the CTRL key and click on each element to be copied:

     All clicked elements will be selected.
   - Hold down the SHIFT key and click on the first and the last element to be copied:

     The first element, the last element, and all elements in between are selected.
4. Right click an element and select *Copy* from the context menu.

   The *Copy attachments* dialog box appears.



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

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

6. Ciick *OK*.
7. Open the context menu for the new parent element below which you want to paste the copied elements.
8. Click *Paste*.

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

3.1.5 Filling in dimensions

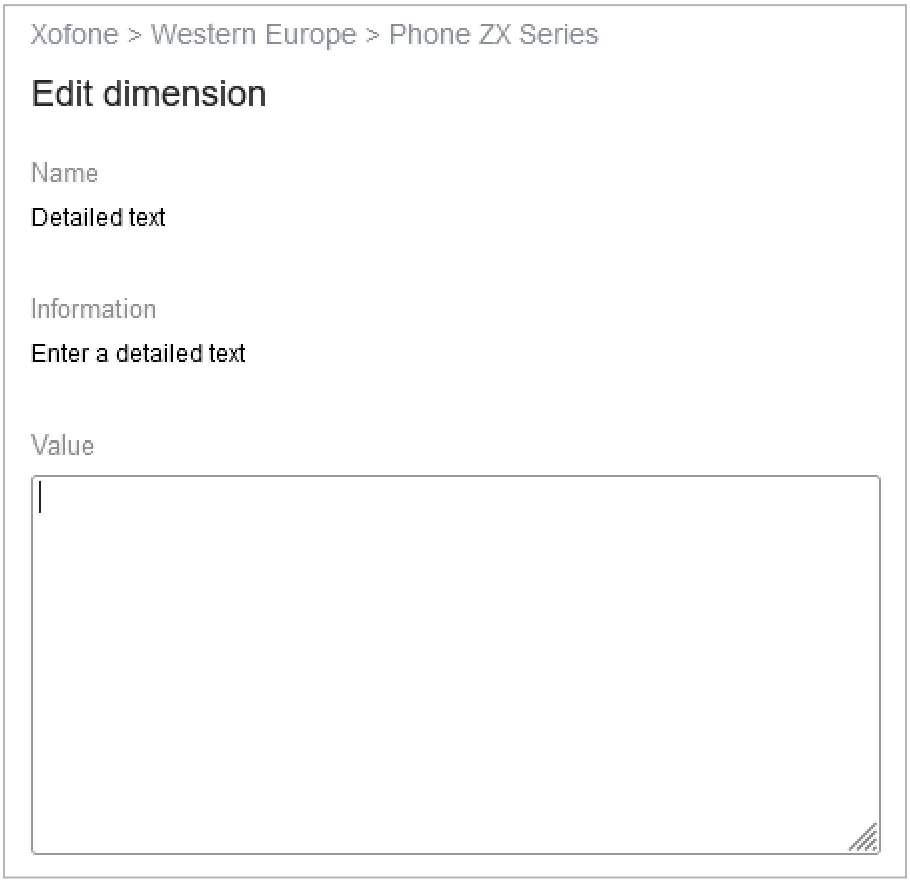
You use dimensions to describe elements uniformly in the Planner. In a dimension, for example, you can record which target group the marketing activity is aimed at. Dimensions are set up specifically for your system.If you have any questions, please contact your system administrator.

A dimension can be defined as a mandatory dimension. In this case, the dimension should be filled in for each element. You can recognize a mandatory dimension by the triangle in front of its name on the *Dimensions* tab in the detailed view. A note below the table also draws your attention to the necessary editing.

In addition, the icon may be displayed for a dimension. This means that a value has already been entered for the dimension and that this value has been inherited by the parent element. You can edit inherited values retroactively. When you edit an inherited value, the icon is displayed.

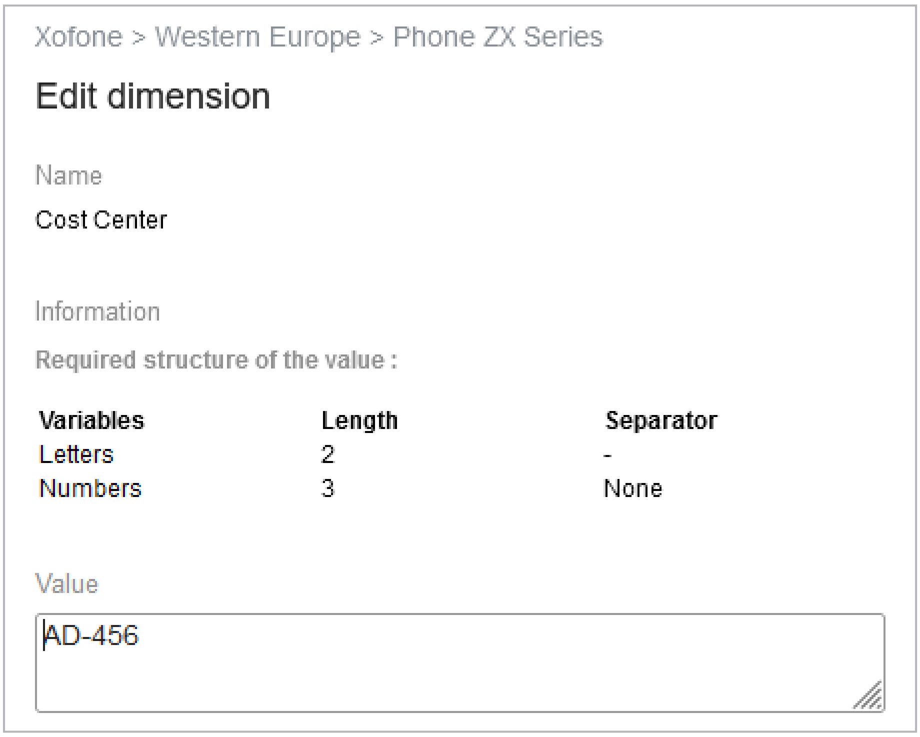
Dimensions can be of different types. The following sections explain the differences in editing.

Text



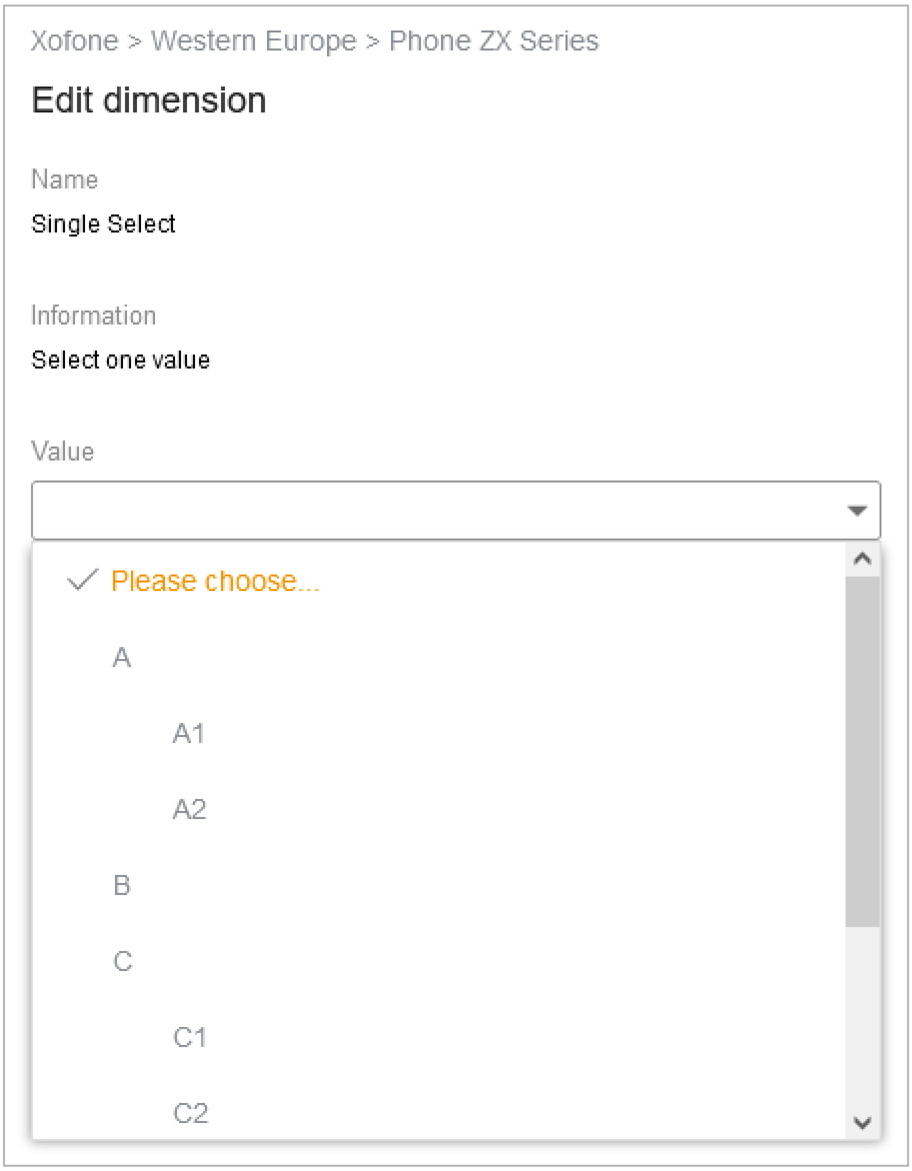
The screenshot shows a dimension where you enter text. Read the information where your administration may have entered interesting facts for you. The text field may possibly be limited to the input of 255 characters maximum.

Structured text



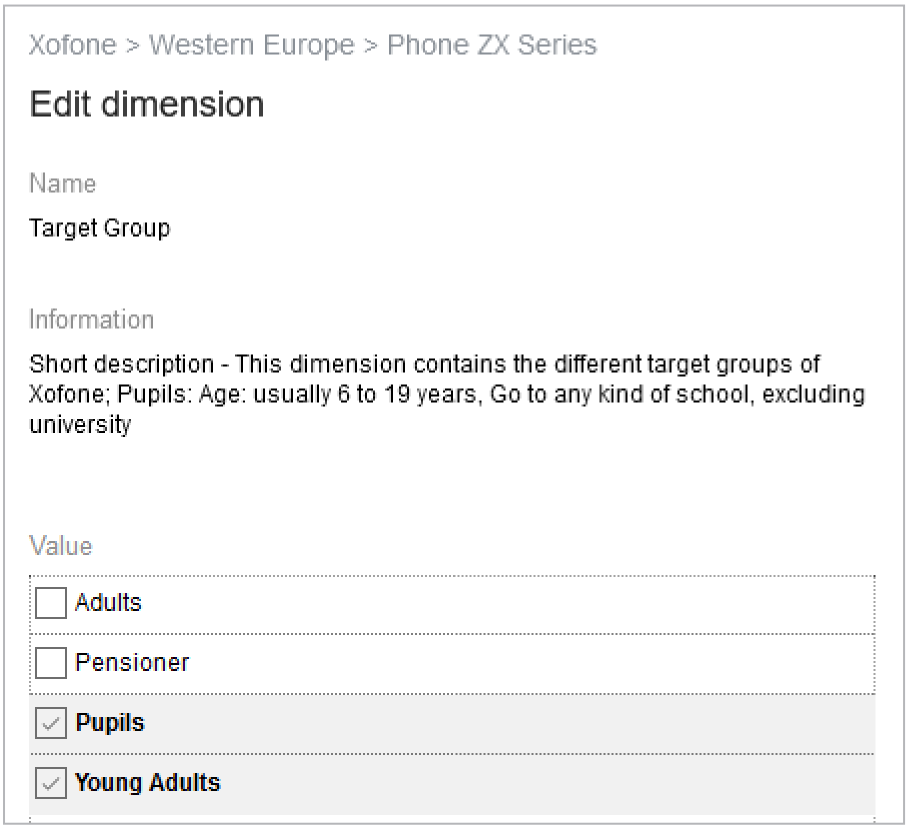
The screenshot shows a dimension where you have to enter text according to a specific rule. The defaults are displayed above the input field. Read the information where your administration may have entered some interesting information for you.

Choosing a value



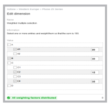
If you are to select a value in a dimension, a dropdown list is displayed. Click the desired value in the list. Read the information where your administration may have entered some interesting information for you.

Selecting one or more values



If you can select one or more values, the values are displayed in a list preceded with checkboxes. Activate the checkboxes of the values you want to select. Read the information where your administration may have entered some interesting information for you.

Weighted selection of one or more values



If you are to make a weighted selection, the values are displayed in a list preceded by a checkbox. If you activate a checkbox, an input field is additionally displayed at the end of the line. Enter numbers between 1 and 100 in the input field so that the sum of all numbers is exactly 100.
Read the information where your administration may have entered some interesting information for you.

Filling in dimensions

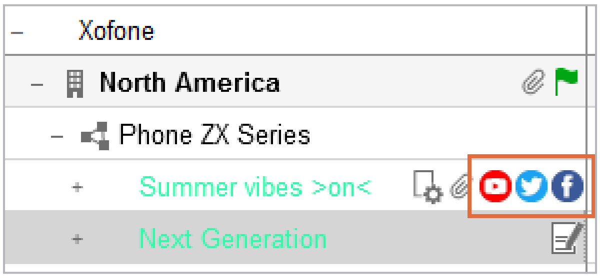
1. Open the detailed view of the element in which you want to fill in a dimension.
2. Go to the *Dimensions* tab.

   The dimensions that you can access are listed.
3. Select a dimension.
4. Click *Edit*.
5. Edit the dimension according to the type. Note the preceding sections in this chapter.
6. Click *Save*.
7. Choose *X* to close the detailed view.

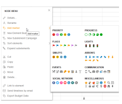
You have filled the values for the selected dimension.

3.1.6 Highlighting an element

Symbols and icons are available in the Planner with which you can mark the planning elements. For example, you can highlight a status visually or assign the element to a social network using the corresponding logos:



The following screenshot shows the menu with all available markers. In addition, further markers may have been created in your system.



Note

Your system administrator will tell you the exact meaning of the markers used in your system.

Associated tasks

- *Assigning markers* below
- *Deleting markers* on the facing page

3.1.6.1 Assigning markers

In the calendar or in the budget view

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is loaded.
2. In the tree structure, navigate to the element to which you want to add a marker.
3. Right-click on the element.

   The context menu appears.
4. Place the cursor on the *Add marker* menu item and click the desired icon in the list of available markers.

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

In the detailed view

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to the element to which you want to add a marker.
3. Double click on the element.

   The detailed view will open.
4. Click the *Edit general element info* button in the *Quick actions* column.

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

5. Click *Add marker*.

   The list of available markers is displayed.

6. Click the desired icon.

The selected marker is added to the element.

3.1.6.2 Deleting markers

In the calendar or in the budget view

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is loaded.

2. In the tree structure, navigate to the element from which you want to delete a marker.
3. Right-click on the icon.

   The context menu appears.

4. Choose *Delete marker*.

The marker is deleted.

In the detailed view

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to the element from which you want to delete a marker.
3. Double click on the element.

   The detailed view will open.
4. Click the *Edit general element info* button in the *Quick actions* column.

   The *Edit general element info* dialog box will open.
5. Click the icon you want to remove.

   The context menu opens.
6. Click the Recycle Bin icon.

The marker is deleted.

3.1.7 Cutting and pasting an element

You can cut one or more planning elements completely, including any sub-elements, from the tree structure and paste it in a different position.

> **Note**
>
> 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. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to an element that you want to cut.
3. If you want to cut and paste multiple elements, select the elements:

   - Hold down the CTRL key and click on the elements to be deleted:

     All clicked elements will be selected.
   - Hold down the SHIFT key and click on the first and the last element to be deleted:

     The first element, the last element, and all elements in between are selected.
4. Right click this element and select *Cut* from the context menu.
5. Open the context menu for the new parent element below which you want to paste the cut elements.
6. Click *Paste*.

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

3.1.8 Moving an element

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

> Note
>
> Note that the runtimes of child elements must be the same as or within the runtime of the parent element. If you move 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.

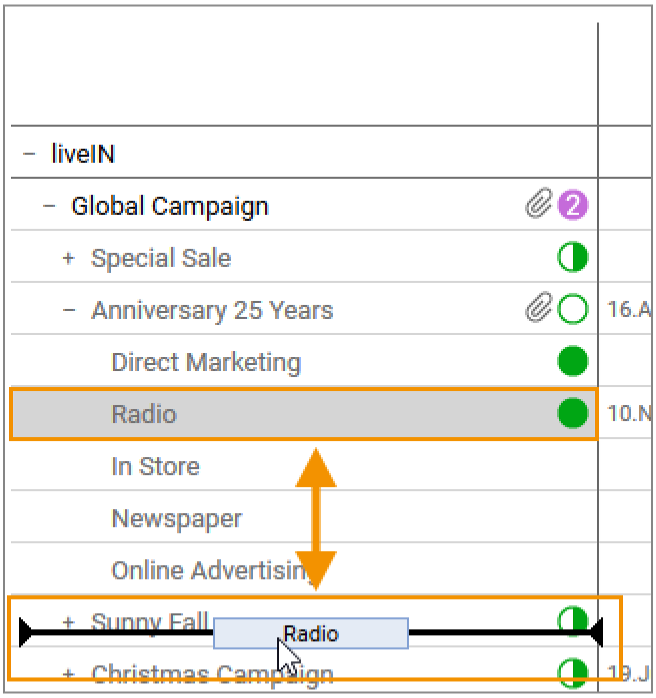
You cannot move planning elements with blanket orders or call orders. For information on blanket orders and call orders, refer to chapter*POs* on page 153.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to the element that you want to move.
3. Right-click this element and select *Move* from the context menu.

4. 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.



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

   A dialog box is opened.

6. 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:
   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.

The element is added to the selected position.

3.1.9 Deleting an element

> Attention! Data loss!
>
> When you delete, all associated data, such as invoices, attachments, or timelines, will be lost in all valid years. You cannot reverse the deletion.

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to the element that you want to delete.
3. Right-click this element and select *Delete* from the context menu.
4. A confirmation prompt is displayed.
5. Click *OK*.

The planning element is deleted.

3.1.10 Deleting multiple elements

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

1. Click in the top navigation > *Planner* and select in the module navigation either > *Calendar* or > *Budget*.

   You switch to the selected view. The tree structure is displayed.
2. In the tree structure, navigate to the element that you want to delete.
3. If you want to delete multiple elements, select the elements:
   - Hold down the CTRL key and click on the elements to be deleted:

     All clicked elements will be selected.
   - Hold down the SHIFT key and click on the first and the last element to be deleted:

     The first element, the last element, and all elements in between are selected.
4. Right-click this element and select *Delete* from the context menu.

A confirmation prompt is displayed.

5. Click *OK*.

The planning elements are deleted.

3.2 Scheduling

In the calendar, timelines and tasks indicate when marketing activities will take place. You will get to know the calendar with its functions for scheduling and learn how to manage timelines and tasks.

In the Planner, you can display the marketing activities for a year in a clear tree structure. You can now schedule various activities by specifying timelines for them. Timelines usually represent the timeline in which the marketing activity takes place, for example, a trade show or a discount promotion. For more information, see Section *Timelines* below.

With Tasks and Jobs you mark related events in the calendar. For example, you can note when a task is to be started. For more information, see Section Tasks and jobs.

For efficient work, timelines, tasks and jobs of several elements can be grouped. For more information, see the Groups section.

3.2.1 Timelines

In the Planner, you can display the marketing activities for a year in a clear tree structure. You can now schedule various activities by specifying timelines for them. Timelines represent the time range in which the marketing activity takes place, for example, a trade fair or a discount promotion.

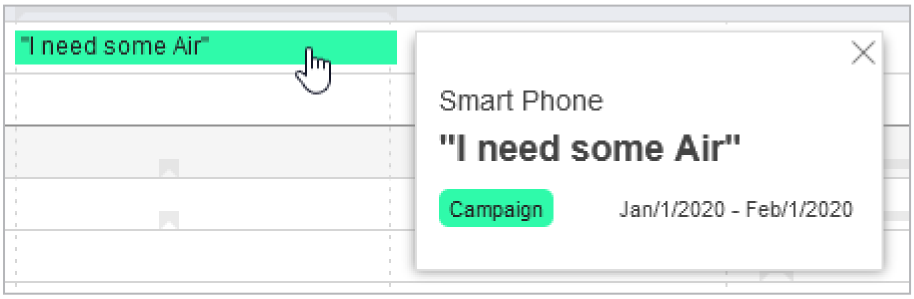
For a timeline, you specify a start date, an end date, and a category. Note that you can create a timeline only in the calendar view.

Timelines are displayed as bars and their color depends on the category you assign. The color of a category is defined when you set up the system and can only be changed system-wide by an administrator. Contact your administrator if you have any questions.

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

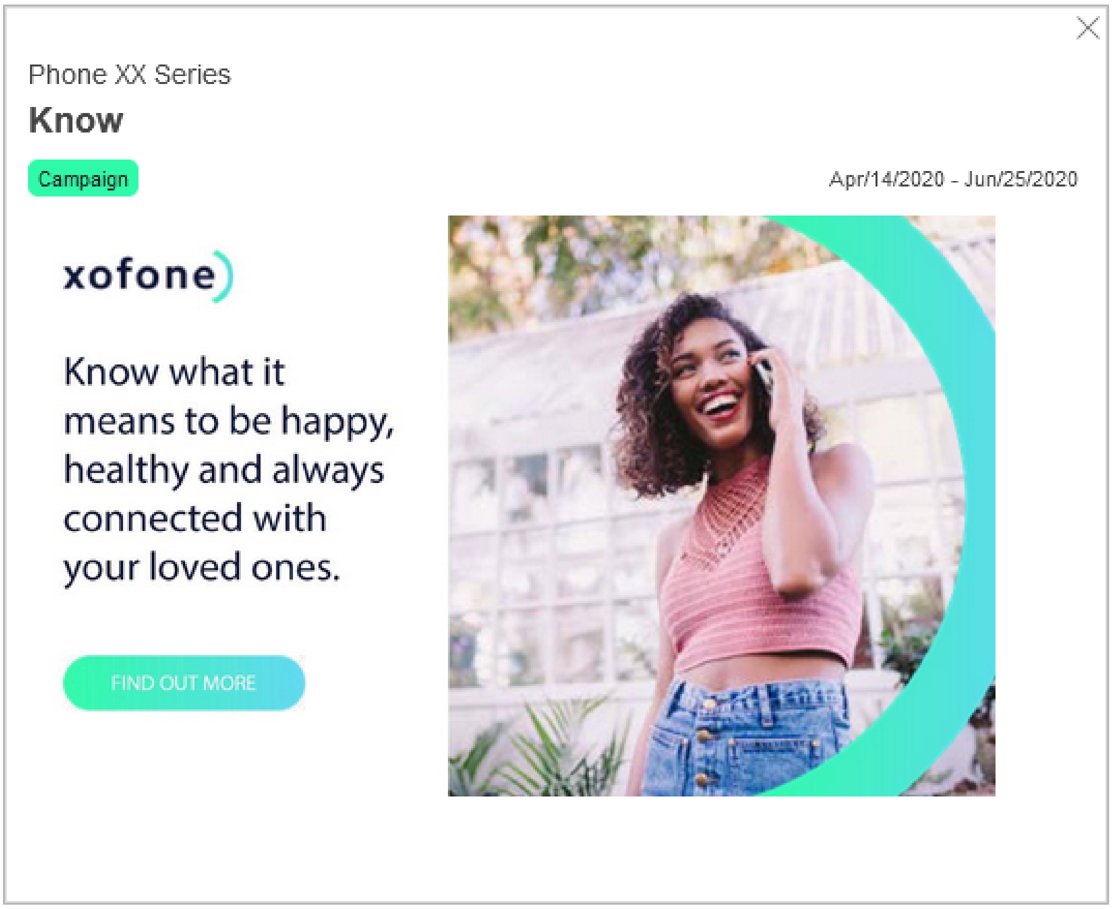
For greater clarity, you can display the timeline names in the bars in the calendar. The administrator must enable this function throughout the system. If you have any questions, please contact your system administrator. If the function is enabled, the names are also displayed in a PDF export of the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

When you place the cursor on a timeline, a tooltip lists key information:



In the above example, *PR* is the name of the element for which the timeline was created. The name of the timeline is *Interview smart digitalism*, and the assigned category is *Press release*. The timeline starts on May 21, 2020 and ends on June 16, 2020.

If activated in your system and set up for the timeline, more information can be displayed in the tooltip:



The example above shows visual information about a campaign. It is also possible to display data from third-party systems. For more information, see chapter*Additional Information* on page 126. If you have any questions, please contact your administrator.

Associated actions

- *Create a timeline* below
- *Copy timeline* on page 75
- *Edit timeline* on page 76
- *Edit dates of a timeline in the calendar* on page 77
- *Move multiple timelines, tasks and jobs of an element* on page 77
- *Moving timelines in the calendar to another year* on page 78
- *Share timeline* on page 79
- *Deleting a timeline* on page 81

3.2.1.1 Create a timeline

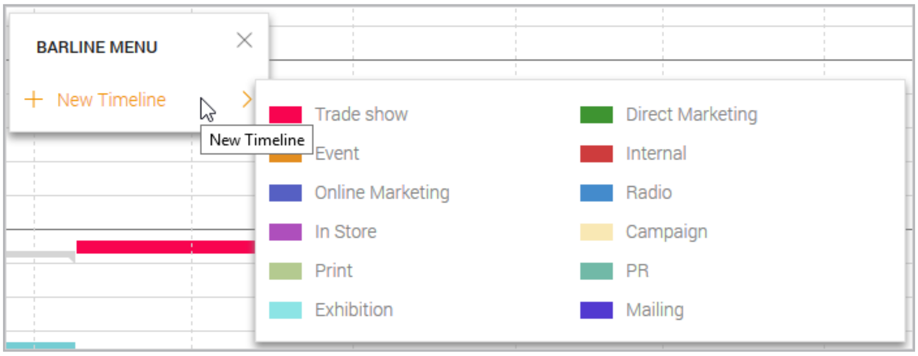
There are two ways to create a timeline:

- In the calendar: This process allows you to quickly and clearly create directly in the calendar.
- In the detailed view: With this procedure you can directly set more details about the timeline.

Create a timeline in the calendar

1. Starting from the top navigation, click > *Planner* > *Calendar*.
2. Right-click on the line of the element for which you want to create a timeline.
3. Click *New timeline* in the context menu.

   The context menu expands.



4. Click the desired category.

   The context menu is hidden. When you move the cursor in the calendar, the respective position is displayed as a date in a tooltip.
5. Place the cursor in the line of the element on the desired start date of the timeline.
6. Left click to define the start date for the timeline and hold the mouse button down.
7. With the mouse button held down, drag the timeline to the desired end date and 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 timeline with a duration of one day is created. You can then increase the duration by editing the timeline in the detailed view.

Creating a timeline in the detailed view

1. Starting from the top navigation, click > *Planner* > *Calendar*.
2. Double click on the line of the element for which you want to create a timeline.

   The detailed view of the element is displayed.
3. Go to the *Timelines* tab.
4. Click *Add*.

   The *Add timeline* dialog box opens.
5. Optional: Enter the name of the timeline in the topmost input field.
6. Enter the start and end date of the timeline.
7. Choose a category.
8. If available in your system: Add information to the timeline. See the chapter *Additional Information* on page 126.
9. Click on *Save*.

You have created a timeline in the detailed view.

3.2.1.2 Copy timeline

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

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to copy.
2. Right-click on the timeline which you would like to copy.

   This will display the context menu for timelines.
3. Choose *Copy*.

   The timeline has now been copied.
4. 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.
5. Click *Paste*.

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.

3.2.1.3 Edit timeline

You can start editing a timeline in the calendar or via the detailed view.

In the calendar

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to edit.
2. Choose:
    a. Double click the timeline.

    or

    a. Right click the timeline.
    b. Select *Details* in the context menu.

    The *Edit timeline* dialog box opens.
3. Edit the properties.
4. Click on *Save*.

You have edited the timeline.

In the detailed view

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to edit.
2. Double click on the element.

    The detailed view will open.
3. Go to the *Timelines* tab.
4. Choose:
    a. In the table, double-click the timeline you want to edit.

    Or

    a. In the table, in the line of the timeline you want to edit, select the checkbox.
    b. Click *Edit*.

The *Edit timeline* dialog box opens.

5. Edit the properties.
6. Click on *Save*.

You have edited the timeline.

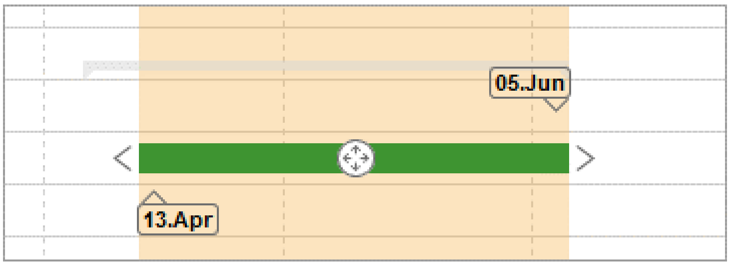
3.2.1.4 Edit dates of a timeline in the calendar

With this action you can vividly either shorten or lengthen a timeline in the calendar, or move it unchanged in length.

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to copy.
2. Right-click on the timeline which you would like to copy.

   This will display the context menu for timelines.
3. Click *Move*.

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

4. Edit the timeline. You can perform one of the following actions:
   - Extend/shorten timeline: Drag one of the arrow icons to the left or right to move the start or end date of the timeline.
   - Move timeline: Move the icon to move the entire timeline in the planning area. The length of the timeline remains unchanged.

You have moved the timeline.

3.2.1.5 Move multiple timelines, tasks and jobs of an element

You use this action, for example, when you have completed the planning for an element. Then you have to move all or some of the timelines, tasks or jobs by the same time period without changing the time intervals between them.

> **Note**
>
> In the following, we will only talk about tasks. Note that this includes jobs.

If you want to move timelines, tasks and jobs of several elements, see the Section*Groups* on page 87.

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose objects you want to move.
2. Right click on an object which you would like to move.

   The context menu appears.
3. Choose one of the following options:
   - *> Multiple selection > Select previous timelines/tasks*: You select - starting from the selected element - previous elements.

     or
   - *Multiple selection > Select subsequent timelines/tasks*: You select - starting from the selected element - subsequent elements.
4. In the dialog box that opens, specify whether you want to move timelines and/or tasks by activating the checkboxes.

   The group will be selected.
5. If you want to add more elements, repeat steps 2 to 4.
6. Right click on the group.

   The context menu appears.
7. Click *Move*.
8. Move one of the icons to move all selected elements into the planning area. The time intervals between them remain unchanged.

You have moved the selected elements as a group.

3.2.1.6 Moving timelines in the calendar to another year

With this action you move a timeline in the calendar to another year.

Prerequisite:Make sure that you see the year boundary over which you want to move the timeline in the calendar. Adjust the calendar zoom accordingly.

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1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to move a timeline.
2. Right click on an object which you would like to move.

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

   Arrow icons are displayed to the left and right of the selected timeline. The icon is displayed in the center of the timeline.
4. Move the timeline:
   - Move the icon to the left-hand margin of the planning area to move the timeline to the predecessor year.
   - Move the icon to the right-hand margin of the planning area to move the timeline to the subsequent year.

   A new dialog box opens.
5. Specify the new data.
6. Click *Save changes*.

You have moved a timeline in the calendar to another year

3.2.1.7 Share timeline

You want to share the appointment (start and end date) of a timeline as an iCalendar file (ICS format) so that other users can easily add the appointment to their calendar. The data will be sent by e-mail. You can share all or selected timelines of an item

Share all timelines of an element

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timelines you want to share.
2. Right-click on the element.

   The element's context menu is displayed.
3. Click *Send timelines by e-mail*.

   The *Send by e-mail* dialog box is displayed.
4. In the *Recipients* field, search for users with whom you want to share the timelines. The field works like a search: Enter a name. The dropdown shows corresponding hits. Click the desired hits to transfer the users to the

recipient list. Repeat as necessary until all recipients are entered.

The selected recipients are listed in a table. The *Access* column displays whether the users can access the Planner.

5. Enter your message in the input field.
6. Choose *Send*.

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

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. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timelines you want to share.
2. Double click on the element.

   The detailed view of the element is displayed.
3. Go to the *Timelines* tab.
4. In the first column in the table, activate the checkboxes for the timelines that you want to send. You must activate at least one checkbox.
5. Choose *Send as e-mail*.

   The *Send timelines by e-mail* dialog box is displayed.
6. In the *Recipients* field, search for users with whom you want to share the timelines. The field works like a search: Enter a name. The dropdown shows corresponding hits. Click the desired hits to transfer the users to the recipient list. Repeat as necessary until all recipients are entered.

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

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

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.

3.2.1.8 Deleting a timeline

You can delete a timeline In the calendar or in the detailed view.

In the calendar

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to delete.
2. Right-click on the timeline which you would like to delete.

   This will display the context menu for timelines.
3. Click *Delete*.

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

The timeline is deleted.

In the detailed view

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element whose timeline you want to delete.
2. Double-click on the element.

   The detailed view of the element is displayed.
3. Go to the *Timelines* tab.
4. In the table, in the line of the timeline you want delete, select the check-box.
5. Click *Delete*.

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

The timeline is deleted.

3.2.2 Create task or job

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to create a task or a job.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Tasks* tab.
4. Click *Add*.

   The *Create task* dialog box is displayed.
5. Edit the *Name*, *Date* and *Status* mandatory fields.
6. Optional:
   - Edit the icon representing the task or job in the calendar.
   - Select the responsible person.
   - Enter additional information in the *Notes* field.
7. Choose:
   - You want to create a task:
     - Make sure that *Simple Task* entry is selected in the *Type* field.
   - You want to create a job:
     - Select a job type in the *Type* field. Every entry except *Simple Task* is a job type.
     - In the *Workflow* field, select a workflow for the job type. Note that each job type probably has different workflows.
8. Click *Save*.

Your details are saved:

- *If you have created a task*: The task has been created and is displayed using the selected icon 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 icon of a task in the planning area, a tooltip is displayed with information about the task (date, name of the task, status, responsible person).
- *If you have created a job*: The job data sheet opens. In the data sheet, edit other fields if necessary, depending on the configuration of the job type. For more information, refer to the user manual of the *Job Manager*

module. When you have finished editing the data sheet, click the X to close the data sheet. Then the detailed view of the planning element is displayed again. In the detailed view, click the X again to close the detailed view.

3.2.2.1 Create task or job

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to create a task or a job.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Tasks* tab.
4. Click *Add*.

   The *Create task* dialog box is displayed.
5. Edit the *Name*, *Date* and *Status* mandatory fields.
6. Optional:
   - Edit the icon representing the task or job in the calendar.
   - Select the responsible person.
   - Enter additional information in the *Notes* field.
7. Choose:
   - You want to create a task:
     - Make sure that *Simple Task* entry is selected in the *Type* field.
   - You want to create a job:
     - Select a job type in the *Type* field. Every entry except *Simple Task* is a job type.
     - In the *Workflow* field, select a workflow for the job type. Note that each job type probably has different workflows.
8. Click *Save*.

Your details are saved:

- *If you have created a task*: The task has been created and is displayed using the selected icon 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 icon of a task in the planning area, a tooltip is displayed with information about the task (date, name of the task, status, responsible person).

- *If you have created a job*: The job data sheet opens. In the data sheet, edit other fields if necessary, depending on the configuration of the job type. For more information, refer to the user manual of the *Job Manager* module. When you have finished editing the data sheet, click the X to close the data sheet. Then the detailed view of the planning element is displayed again. In the detailed view, click the X again to close the detailed view.

3.2.2.2 Edit a task

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to edit a task.
2. Open the editing dialog for the task:
   - About the calendar:
     1. Double click on the task icon. If several task icons overlap, right-click on the task icons. Choose *Select a task* in the context menu. In the *Select a task* dialog box, select the checkbox of the task you want to edit. Click *OK*.
   - Using the detailed view:
     1. Double click on the element.

        The detailed view will open.
     2. Go to the *Tasks* tab.
     3. Double click the task you want to edit.

   The *Edit task* dialog box is displayed.
3. Edit the fields.

   Note: You can convert a task into a job by editing the *Type* and *Workflow* fields. However, a job cannot be converted into a task.
4. Click *Save*.

   Your entries are saved.
5. Click *X*.

The detailed view closes. You have edited the task.

3.2.2.3 Deleting a task

Attention! Data loss!

You cannot reverse the deletion of tasks.

In the calendar

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to delete a task.
2. Right click on the task.
3. In the context menu, click *Delete*.

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

You have deleted the task.

In the detailed view

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to delete a task.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Tasks* tab.
4. Activate the checkboxes for the tasks that you want to delete.
5. Click *Delete*.

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

You have deleted the task.

3.2.2.4 Editing a job

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to edit a job.
2. Double click on the element.

   The detailed view will open.

3. Go to the *Tasks* tab.
4. Double click the job you want to edit.

   The *Edit task* dialog box is displayed.
5. Edit the fields.

   Note: You can convert a task into a job by editing the *Type* and *Workflow* fields. However, a job cannot be converted into a task.
6. Click *Edit details*.

   The job data sheet opens.
7. Edit the data sheet and save your entries. For more information, refer to the user manual of the *Job Manager* module.
8. Click *X*.

   The data sheet is closed and the detailed view of the element is displayed.
9. Click *X*.

The detailed view is closed. You have edited the job.

> Note
>
> You can also edit a job in the *Job Manager* module.

3.2.2.5 Deleting a job

> Attention! Data loss!
>
> You cannot reverse the deletion of jobs.

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to delete a job.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Tasks* tab.
4. Activate the checkboxes for the jobs that you want to delete.
5. Click *Delete*.

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

You have deleted the job.

3.2.3 Groups

For efficient work, timelines and tasks of several elements can be grouped. This allows you to conveniently move related timelines and tasks in case of planning changes. 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
>
> You can only add tasks to a group, but not jobs.

> 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.

Associated tasks

- *Grouping tasks and timelines* below
- *Adding a task, timeline, or group to a group* on the next page
- *Excluding a task or timeline from a group* on the next page
- *Ungrouping* on page 89

You can also reach the functions via the*Group manager* on page 89. Here, you can move tasks or timelines in a group easily, for instance. You can use the Selection Assistant to gather tasks, timelines, and groups that you want to manage in the list view. 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

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the elements whose tasks or timelines you want to group.
2. Hold down the CTRL key and click the tasks and timelines that you want to group.

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

   The context menu opens.
4. 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

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the elements whose group you want to add.
2. Click an object from the group to which you want to add an object.
3. 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 icon.
4. Right click one of the selected objects.

   The context menu appears.
5. 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

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the elements from whose group you want to exclude tasks or timelines.
2. 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.
3. 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.
4. Right-click one of the objects (with the circle symbol) to be excluded.

   The context menu appears.
5. Choose > *Group* > *Exclude from group*.

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

> Note
>
> You can also reach this function via the *Group manager* below.

3.2.3.4 Ungrouping

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the group you want to ungroup.
2. Click an object from the group which you want to ungroup.

   All of the objects are selected.
3. Right click one of the objects.

   The context menu opens.
4. Choose > *Group* > *Ungroup group*.

The objects are ungrouped.

3.2.3.5 Group manager

The group manager displays the following objects:

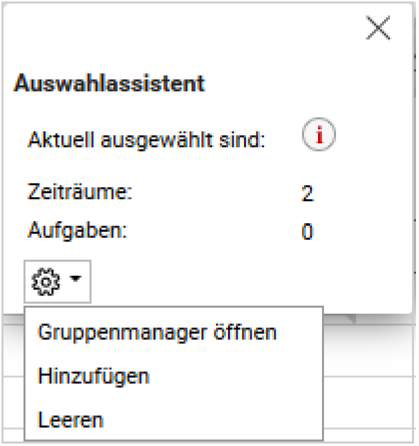
- If you access the Group Manager in the calendar view by choosing Group > Open group manager: The objects selected in the calendar view (tasks, timelines, or groups)

  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.

Selection Assistant

If you have selected at least one task or timeline in the calendar view, you can call up 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:

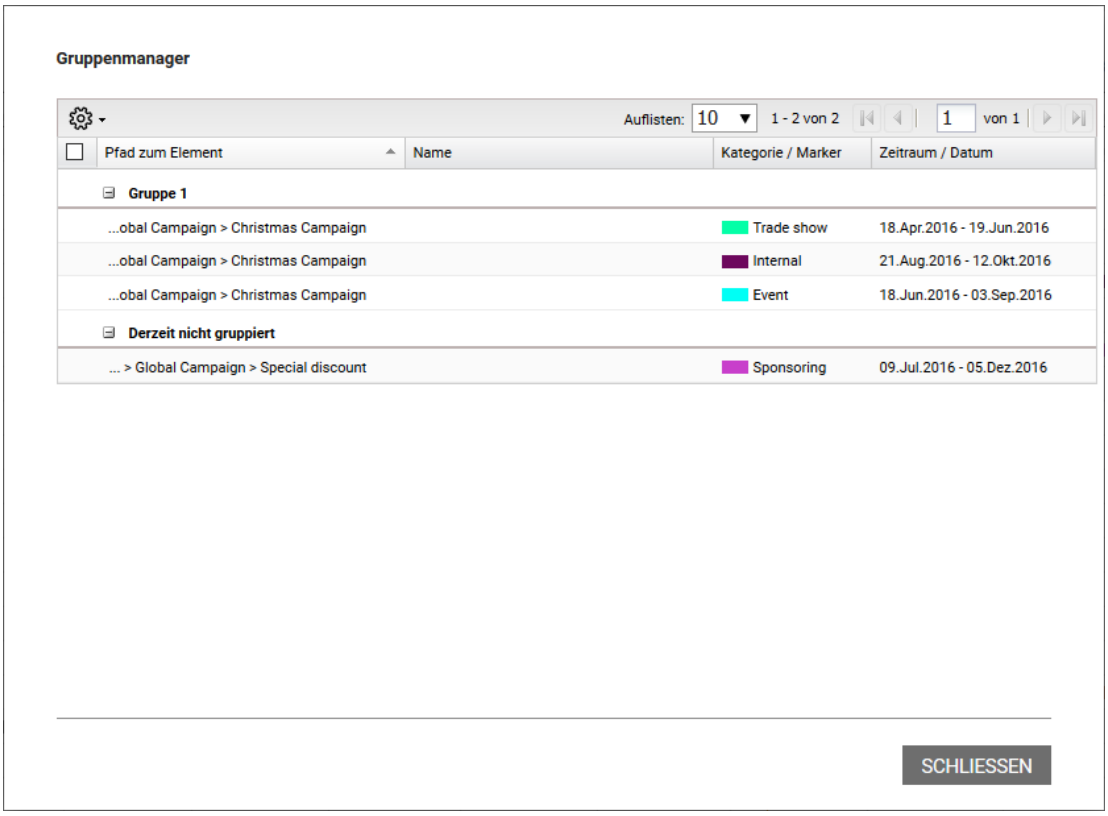
- In the calendar view context menu: > *Selection Assistant* > *Add*
- In the Selection Assistant: > *Gear icon* > *Add*

Once you have added all of your required objects to the group, switch to the Group Manager with > *Gear icon* > *Open group manager*.

Note

The collection in the Selection Assistant is preserved when you close the window with the x icon. If you want to remove the tasks and timelines from the Assistant, select > *Gear icon* > *Empty*.

Structure of the Group Manager



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

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.
- Timeline/date for the object.

Group Manager functions

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

- *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.

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

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

For financial planning, you enter planned and target budgets for the marketing activities. In this chapter you will learn how to enter the data and how to change it if necessary.

The Marketing Planner offers you two budget types with which you can design budgeting:

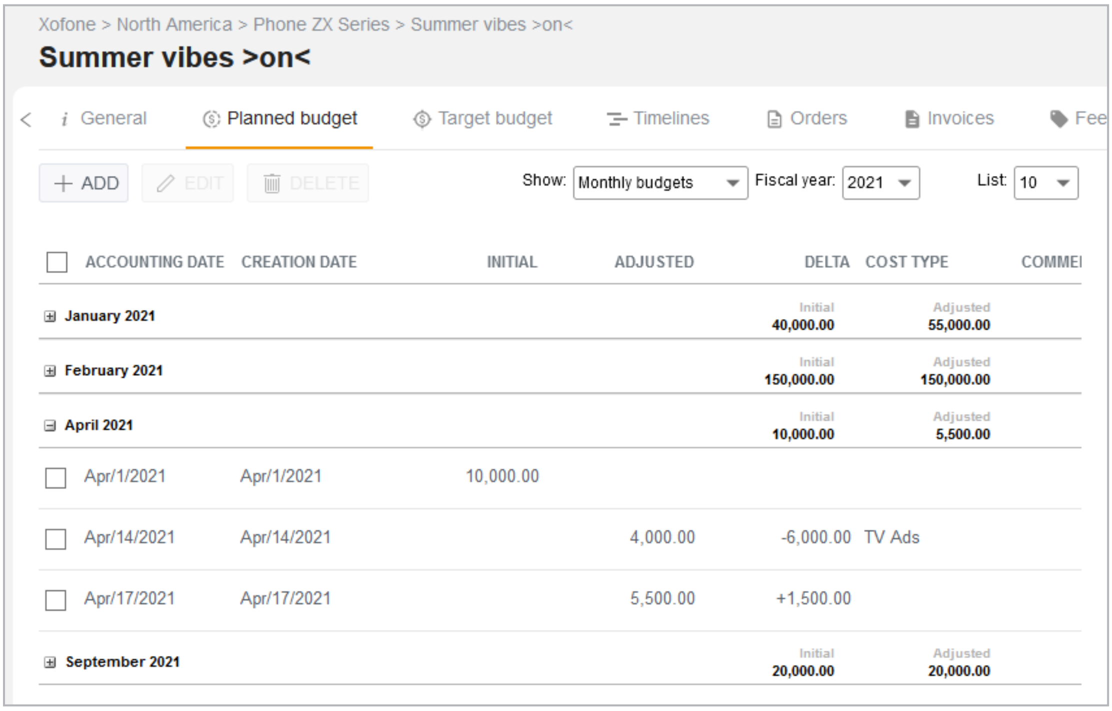
- *Target budget*: You use target budgets to map targets set by management.
- *Planned budget*: With planned budgets, you represent the status of the planning.

Documentation of changes

For both budget types, you specify an initial budget and can subsequently map any changes. This allows you to see how the planned budget evolves:

- 1. 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.

Note that you can enter initial planned and target budgets with the value 0. It is not possible to enter a delta value with the value 0 for both budget types.

The budget view always shows the current total amount for a period.

Data

For a planned or target budget, you manage the following data:

- *Amount*: Value of the budget; For changes, enter either a new total amount or the change amount (delta).
- *Calculation date*: The calculation date determines to which planning period the budget is assigned. If you enter the date 22 March 2022 for a monthly budget, the amount will be assigned to the planning month of March 2022. If you enter the date 22 March 2022 for an annual budget, the amount will be assigned to the planning year 2022.
- *Creation date*: If necessary, enter the date on which the budget amount or the change to a budget was determined. This date can help you better track decisions.
- *Cost type*: Assign the budget to a cost type if needed. Select an amount from the list or enter a new cost type.
- *Comment*: Enter additional information for your colleagues, if necessary.

Note that *Amount* (total or delta) and the *Calculation date* are mandatory entries.

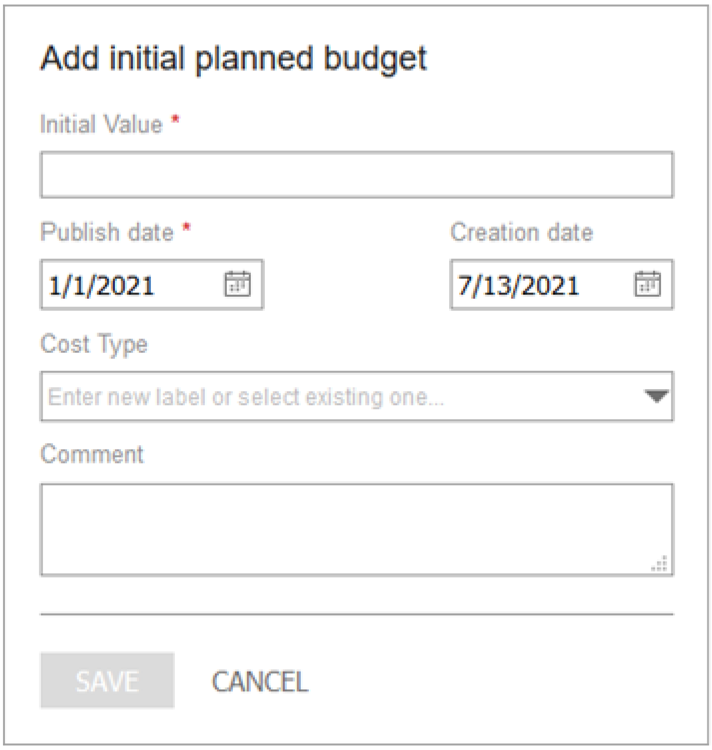
Input

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

- You open the detailed view of the element and switch to the *Planned budget* or *Target 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:

- After double-clicking, the cell is in edit mode and you enter the value directly into the cell. Then the following planned budget data 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 calculation 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:



Planning types

The periods for which budgets are entered depend on the planning type of the year. When creating a fiscal 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*: In 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.

> **Note**
>
> Your administrator can inform you which planning type is used in your year. Therefore, if you have any queries, contact the administrator in charge. If this is not possible, find out the planning type with the following test:
> Make sure you see either the Planned or Target budget column in the Budget view. You must see the respective column as both monthly and annual.
> Then enter any value in a month column of any element, for example, enter the value 10 in the target column of January. Note the year column of the element when you save the value:
>
> - The year column remains unchanged: The year uses the *Top-Down* planning type. You are given an annual budget, which you manually distribute to the monthly columns.
> - The year column increases by the entered value: The year uses the *Bottom-Up* planning type. You plan the monthly budgets, which is then summed up to an annual budget.

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.

If you use multiple currencies, note that the input is entered in the currency used for the display: The value entered is always interpreted as the value of the currency set in each case, i.e. either reference or working currency.

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.

> Note
>
> If a dash is displayed instead of an amount in a reference currency, a variable is missing for the calculation of the amount. In this case, the associated exchange rate is probably not entered. Contact your administrator so that this can be corrected.

Associated tasks

- *Create initial budget or budget change* below
- *Edit initial budget or budget change* on page 99
- *Deleting initial budget or budget change* on page 99

3.3.1 Create initial budget or budget change

In the budget view

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to create a planned or target budget.
2. Make sure that you see the required columns in the budget view: For example, if you want to enter a planned budget for the month of March, the months (instead of quarters) must be displayed and the budget view must show the *Plan* column for each month.
3. In the line of the element in the required period, double-click on the budget cell.
4. Choose:

- When the cell opens in edit mode:
    a. Enter the new total amount.
    The calculation 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.
    b. Press the Enter key.
- If a dialog box opens:
    a. Enter either the initial budget or, in the case of a budget change, the new total amount or the delta.
    b. Edit the remaining data
    c. Click *Save*.

You have created the budget in the detailed view.

In the detailed view

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to create a planned or target budget.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Target budget* or *Planned budget* tab.
4. Choose whether you want to add an annual budget or a monthly budget.
5. Select the fiscal year for which you want to enter the budget.
6. Click *Add*.

   A dialog box opens. If no budget has been entered for the selected period yet, the dialog box for adding an initial budget will open. If a budget is already entered, the dialog box for adding a budget change opens.
7. Enter the data.
8. Click *Save*.

You have created the budget.

3.3.2 Edit initial budget or budget change

You can edit an initial budget or a budget change only in the detailed view. Note that you cannot make a budget change with this process.

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to edit a target or planned budget.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Target budget* or *Planned budget* tab.
4. Choose whether you want to edit an annual budget or a monthly budget.
5. Select the fiscal year for which you want to edit the budget.
6. Activate the checkbox of the entry that you want to edit.
7. Click *Edit*.

   A dialog box opens.
8. Edit the data.
9. Click *Save*.

Your input is saved.

3.3.3 Deleting initial budget or budget change

You can delete an initial budget or a budget change only in the detailed view.

> Attention! Data loss!
>
> You cannot reverse the deletion of initial budget or budget change.

1. Starting from the top navigation, click > *Planner* > *Calendar* and navigate to the line of the element for which you want to delete a target or planned budget.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Target budget* or *Planned budget* tab.
4. Choose whether you want to delete an annual budget or a monthly budget.

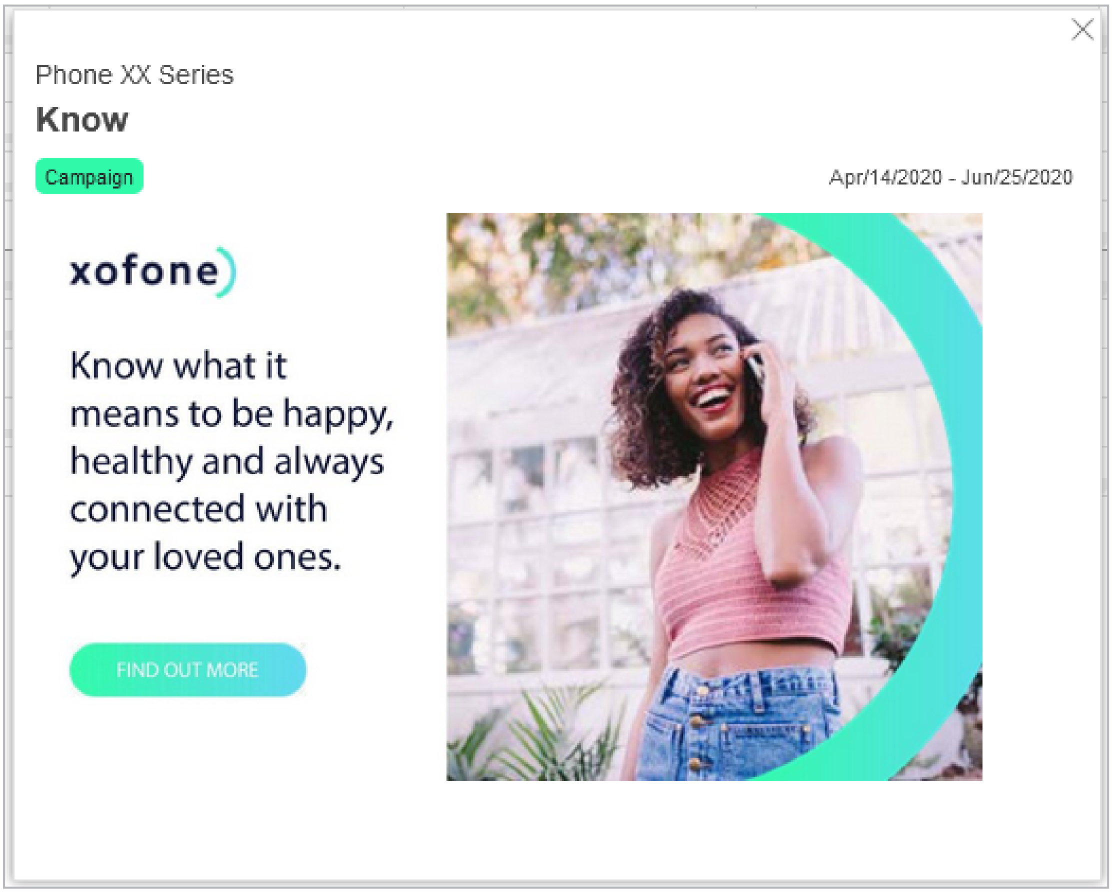
5. Select the fiscal year for which you want to delete the budget.
6. Activate the checkbox of the entry you want to delete. If you want to delete several entries, activate the checkboxes of all entries to be deleted.
7. Click *Delete*.

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

The selected entries will be deleted.

Management 4

In the management phase, you need to keep track of ongoing activities, manage related POs and invoices, and maintain other costs as necessary. This also takes into account managing processes and keeping colleagues and stakeholders informed of activities:



This includes the following topics:

- ◦ *Presentation of budget data* on page 169
- ◦ *Customized budget calculations* on page 177

4.1 Filtering and sorting elements

As a rule, you have access to a large number of planning elements. By filtering and sorting elements, you get a better overview of the marketing activities and can specifically compare or highlight important aspects for reporting.

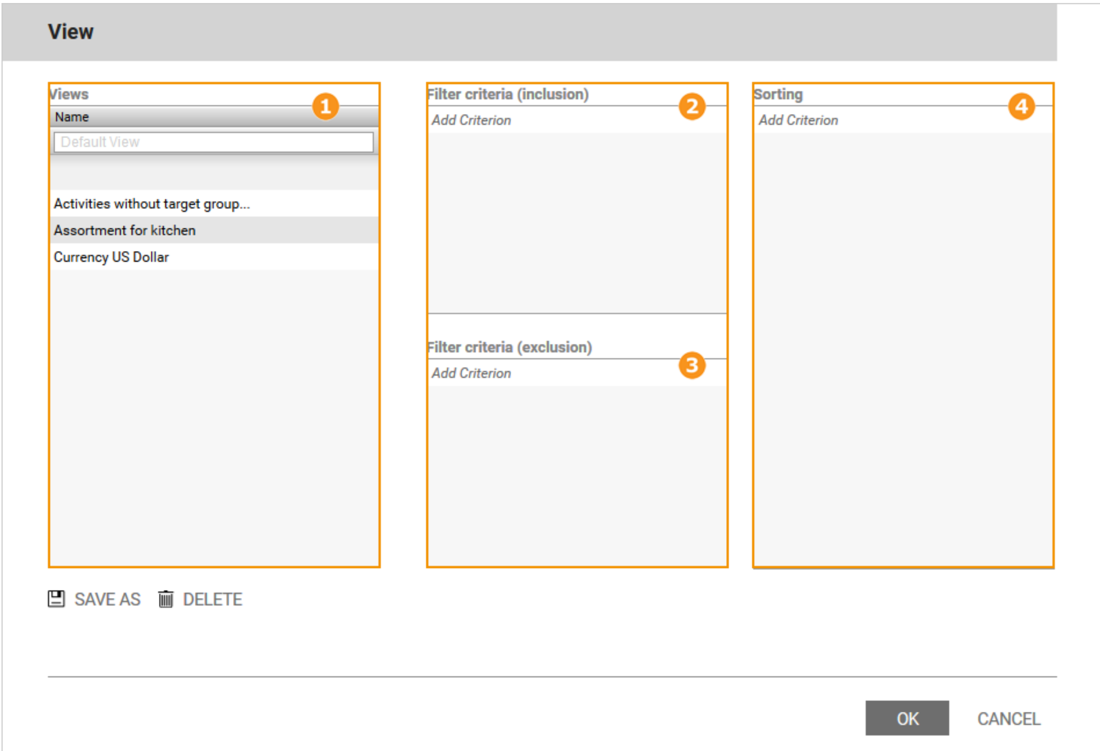
The Planner offers you two ways to filter elements:

- Simple filtering based on a few criteria and criteria specified by your administrator. For more information see chapter Use quick filter.
- Extensive filtering function, with which you can set detailed criteria yourself. Refer to the following sections when doing so.

For example, you have the following options:

- To narrow the view specifically to certain elements of the tree structure and to sort them according to certain criteria.
- Save a set filtering and sorting as a view to reset and reuse it again when needed.
- Publish a view so that other users can access the view that you have saved.

In the Calendar or Budget view, click > *View* > *Sort and filter* to access the filtering and sorting options for the planning elements. The following dialog box opens:



Section	Description
1 views	This area lists the saved views. You can also edit the settings for a saved view.
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 on the available criteria, see the *Available Filter Criteria* section below.
4 Sorting criteria	In the right-hand area of the dialog box, you enter the sorting criteria. For more information on the available criteria, see the *Available Sorting Criteria* section below.

Logically linking the filter criteria

If you choose criteria in both lists (and), 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 each list. If you enter multiple criteria in a list, 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) or excluded (list).

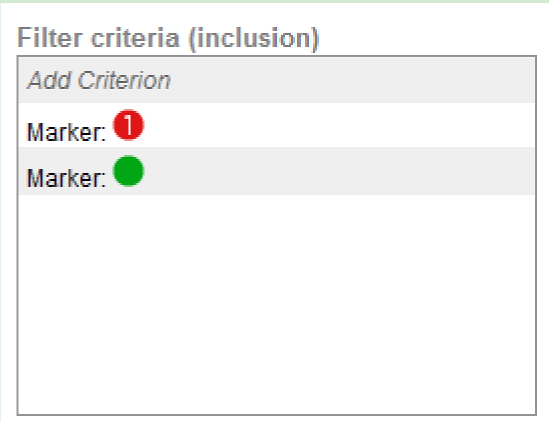
If you define multiple values for a criterion, they are linked with an OR-link. That means that one value for each criterion must match.

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

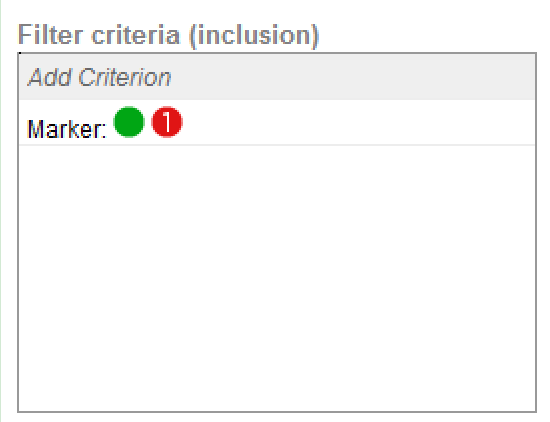
You want to display the elements marked with the markers for *Priority 1* ( ) and *Status completed* ( ).

If you want to display elements that contain timelines with both categories, create two criteria in list : One criterion with the marker = and one criterion with the marker = :



In this case, filtering will display only elements to which both markers are assigned.

If you want to display elements that contain timelines in at least one of the categories, create one criterion in list 2. Assign both values to this criterion:



The result will show all elements that have one or both markers assigned.

Available filter criteria

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.

Name	Description
Fees	You filter the view by one or more fees assigned to the elements.
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.
Lowest tree level	Use lowest tree level as criteria to limit 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.

Available sorting criteria

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*.

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*Create view* on page 112.

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 the *Standard View* entry 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.

Associated actions

- *Filtering and sorting* on the next page
- *Filtering with exclusion criteria* on page 111
- *Create view* on page 112
- *Use view* on page 114
- *Edit view* on page 114
- *Copy view* on page 115
- *Deleting a view* on page 116

4.1.1 Filtering and sorting

Note

For better clarity, this chapter shows you how filtering and sorting work using concrete examples. Note that you can only execute these examples in your system if a corresponding *Target Group* dimension is set up with the specified values. You can also use a different dimension or filter criterion in your system to reproduce the examples.

In the calendar and budget view, you want to display only those planning elements that have been assigned the *Adults* target group via the *Target Group* dimension. You also want these elements to be sorted in ascending order by the person responsible.

1. In the calendar or budget, click > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.

2. Click *Add criterion* in the *Filter criteria* (inclusion) area.
3. Select *Target group* from the dropdown list.

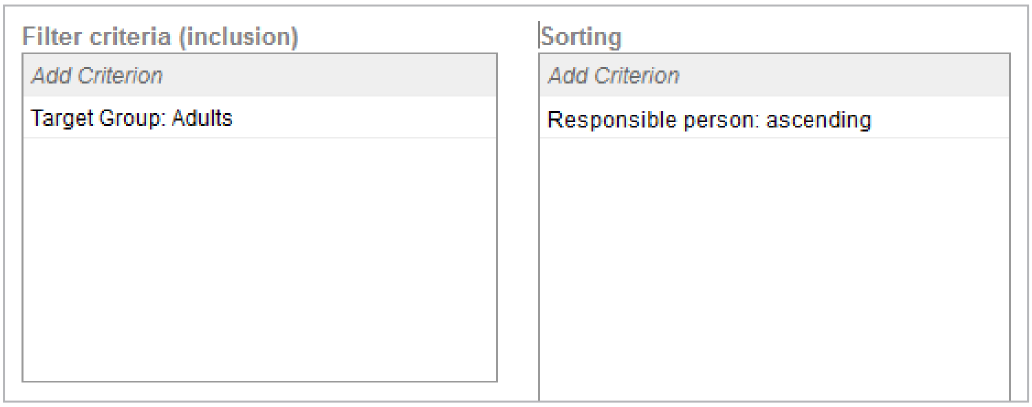
   The input screen is activated.

4. Choose *Add criterion*.
5. Select the *Adult* value from the dropdown list.
6. To complete the selection of the value, click the checkmark icon inside the selection area.
7. To complete the selection of the value, click the checkmark icon outside the selection area.
8. In the *Sorting* area, click *Add criterion*.

   The input screen is activated.

9. Select *Responsible person* from the dropdown list.
10. Make sure that *ascending* is entered in the dropdown list below.
11. To complete the selection of the criterion for sorting, click on the check-mark icon .

    The criteria are displayed as follows



12. Click *OK*.

This closes the dialog box. The screen content is then reloaded. The planning elements to which the selected target group is assigned are displayed sorted in ascending order by the person responsible.

4.1.2 Filtering with exclusion criteria

> **Note**
>
> For better clarity, this chapter shows you how filtering and sorting work using concrete examples. Note that you can only execute these examples in your system if a corresponding *Target Group* dimension is set up with the specified values. You can also use a different dimension or filter criterion in your system to reproduce the examples.

You have seen the first example in chapter*Filtering and sorting* on the previous page but you notice that planning elements are displayed that are also assigned to other target groups. However, you only want to display planning elements that are exclusively assigned to the *Adult* target group.

1. In the calendar or budget, click > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.

2. In the *Filter criterion (exclusion)* area, click *Add Criterion*.
3. Select *Target group* from the dropdown list.

   The input screen is activated.

4. Click *Add Criterion*.
5. Select a value other than *Adult* from the drop-down list.

6. To complete the selection of the value, click the checkmark icon inside the selection area.
7. Repeat steps 5 and 6 until you have added all values except the *Adult* value.
8. To complete the selection of the value, click the checkmark icon outside the selection area.

   The criteria are displayed as follows:

9. Click *OK*.

This closes the dialog box. The screen content is then reloaded. The planning elements to which only the *Adult* target group is assigned are displayed sorted in ascending order by the person responsible.

4.1.3 Create view

You want to create a filtering and sorting as a view and make it available to other users.

1. Click in the calendar or in the budget > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.
2. Make sure that the *Standard view* entry is selected in the *View* area.
3. Define filter and sorting criteria.
4. Click *Save As*.

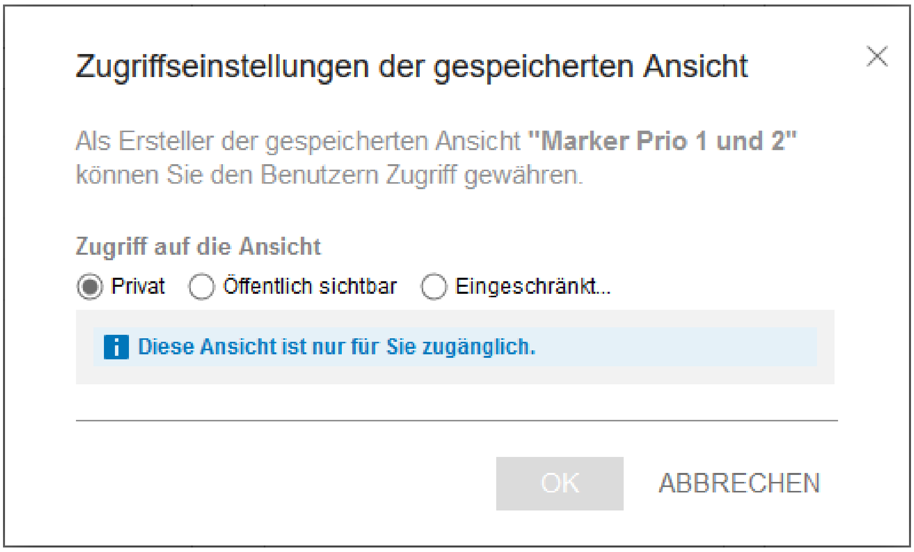
   Another dialog box opens.

5. Enter a name for the view.

   Note: Views that you want to share with other users need a system-wide unique name.

6. Click *OK*.
7. Click the pencil icon next to *Access Private*.

   The *Access settings of the saved view* dialog box opens:

8. Select the group of people to whom you want to make the view accessible:

   The view is then created in the *Views* area

   - *Private* (standard setting): Only you have access to the saved view.
   - *Public*: All Planner users have access to the view.
   - *Restricted*: A screen opens where you can select user groups in the Planner. Only the selected user groups have access to the view.

9. Click *OK*.

   The dialog box closes. The *View* dialog box is displayed again.

10. Click *OK*.

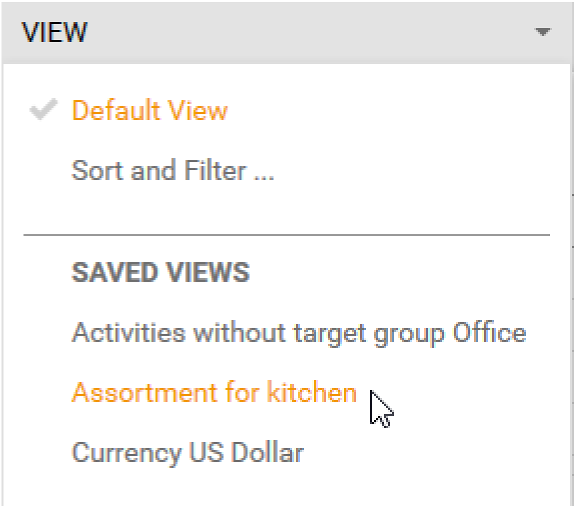
The *View* dialog box closes. The view is saved under the name provided and can be used but not changed by the selected group of people. Only you can change the view.

4.1.4 Use view

1. Click in the calendar or in the budget > *View*.

   The menu opens.

2. In the second menu section, click the desired view.



The filtering and sorting saved in the view is applied to the planning elements.

4.1.5 Share view

You generate a link to the current view of the planning elements in the calendar. You can share the link with other users or call it up from the *Dashboard* module, for example, to get simplified access to selected elements.

1. Click > *Planner* > *Calendar* or > *Budget*.
2. Click under the *Link to view* dropdown list.
3. A dialog box opens.
4. Click the copy icon or copy the displayed link manually to the clipboard.

You have generated the link. Share the link with other users, for example.

4.1.6 Edit view

1. Click in the calendar or in the budget > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.

2. In the *View* area, select the view you want to edit.

3. Optional: Edit filter and sort criteria.
4. Optional: In the *View* area, click the name and edit the entry.
5. Optional: In the *View* area, click the pencil icon next to *Access private* and edit the settings.
6. Click on *Save*.
7. The changes are saved for the view.
8. Click *OK*.

The *View* dialog box closes. You have edited the view.

4.1.7 Copy view

Copying a view is recommended if you have already created a similar view and want to change only a few details.

1. Click in the calendar or in the budget > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.

2. In the *View* area, select the view you want to copy.
3. Optional: Edit filter and sort criteria.
4. Optional: In the *View* area, click the name and edit the entry.
5. Optional: In the *View* area, click the pencil icon next to *Access private* and edit the settings.
6. Click *Save as*.

   A dialog box opens.

7. Enter a name for the new view.

   Note: Views that you want to share with other users need a system-wide unique name.

8. Click *OK*.
9. The dialog box closes. The *View* dialog box is displayed.
10. Click *OK*.

The *View* dialog box closes. You have copied the view.

4.1.8 Deleting a view

Attention! Data loss!

You cannot reverse the deletion of a view

1. Click in the calendar or in the budget > *View* > *Sort and Filter*.

   The *View* dialog box is displayed.

2. In the *View* area, select the view you want to delete.
3. Click *Delete*.

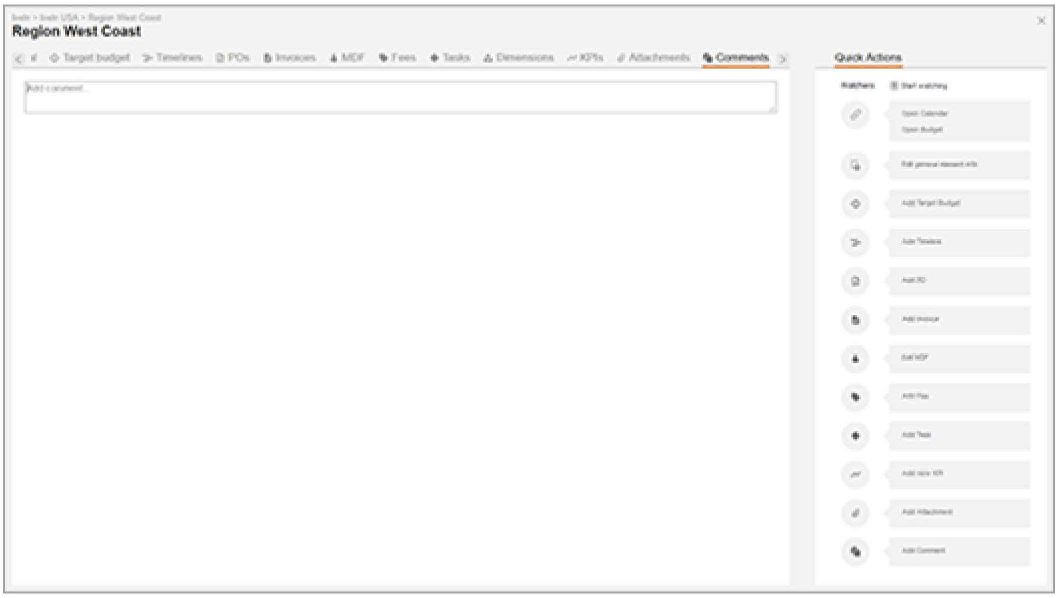
   A confirmation prompt is displayed.

4. Click *Yes*.

The view is deleted. Click *OK* to close the dialog box *View*.

4.2 Annotate

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 Planner, regardless of their access permissions.

You can add as many comments as you like. You can also edit and delete your comments later.

4.3 Watch

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).
  Attention! Exceptions are changes in assigned user groups and additional information on the element. See*Additional Information* on page 126.
- Dimensions
- Target budget
- Planned budget
- Timelines
- Tasks
- POs
- Invoice
- Market development funds
- KPIs
- Attachments
- Comments

You get an overview of your observed planning elements in the *My observed elements* dashlet, see chapter *Watched elements* on page 30.

Provided that your user role has the appropriate permission, you can edit the observers of an element, i.e. add or delete users as observers.

Associated actions

- *Start Watching* on the facing page
- *Stop watching* on the facing page
- *Edit the watchers of an element* on the facing page

4.3.1 Start Watching

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element you want to observe.
2. Double click on the element.

   The detailed view will open.
3. Click *Start Observation* 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 Items* dashlet.

4.3.2 Stop watching

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose observation you want to stop.
2. Double click on the element.

   The detailed view will open.
3. Click *Stop Observation* in the *Quick Actions* area above.

You have stopped the observation of the element.

4.3.3 Edit the watchers of an element

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose observer you want to edit.
2. Double click on the element.

   The detailed view will open.
3. In the *Quick Actions* area at the top, click the number by the *Observer*.

   A dialog box opens where you can enter new users as observers as well as remove observers already entered.
4. Optional: Add the observers:
   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 observers.

d. Repeat steps a to c if you want to add more observers.

5. Optional: Remove the observers:

a. Click the recycle bin icon next to the asset type that you want to delete.

The user is removed from the list of observers.

b. If you want to add more users, repeat step a.

6. Close the dialog box by clicking the X in the top right.

You have edited the observer of the element.

4.4 Attachments

You can supplement your marketing activities with additional information as an attachment. Examples are invoices or brochures of a campaign. The following attachments are possible:

- Upload locally saved files as attachments. The maximum size of each file is 100 MB.
- Links to external websites
- Link to the detailed view of a document
- Download link to an asset

You can view attachments in the detailed view of an item, for example, to check invoices. You have a number of options:

- In the list of all attachments on the *Attachments* tab, see *View attachment on the Attachments tab* on page 123.
- Attachments that are already linked to an order or invoice on the *POs* and *Invoices* tabs, see *View attachment linked to invoice or PO* on page 124

Associated actions

- *Adding attachment* below
- *View attachment on the Attachments tab* on page 123
- *View attachment linked to invoice or PO* on page 124
- *Deleting an attachment* on page 125

4.4.1 Adding attachment

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element where you want to add an attachment.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Attachments* tab.
4. Click *Add*.
5. The *Add attachment* dialog box opens.
6. Choose:

- You want to upload a file:
  a. Make sure that *Attachment* is selected in the *Type of attachment* dropdown list.
  b. Select the file for upload: Drag-and-drop the file onto the upload area of the dialog box. Alternatively, click the upload area and select the file in your file system.
  c. If necessary, enter a comment.
  d. Click *Save*.
- You want to attach an asset.
  a. Make sure that *Attachment* is selected in the *Type of attachment* dropdown list.
  b. Click *Select asset* below the upload area.

     The asset search is displayed.
  c. Search for the asset. For information on a search, refer to the *Media Pool* module user manual, see *Further documentation* on page 20.
  d. Click the plus sign to select an asset as an attachment. If you want to select multiple assets in one step, select all the assets you need. You can also run multiple searches in succession and click each of the matches found.
  e. Click *Apply*.
- You want to attach a document.
  a. Make sure that *Attachment* is selected in the *Type of attachment* dropdown list.
  b. Click *Select document* below the upload area.

     The document search is displayed.
  c. Search for the document. For information on searching, see the user manual of the *Brand template builder* module, see *Further documentation* on page 20.
  d. To select an asset, place the mouse pointer over the thumbnail of the document.

e. Click the checkbox that appears at the bottom right of the thumbnail. If you want to select several documents in one step, activate the checkboxes of the required documents. You can also perform several searches in a row and click each of the hits found.

f. Click *Use selected documents*.

- You want to add a link.

  a. In the *Attachment type* list, select *Link*.

  b. Enter a name for the link.

  c. In the *URL* field, enter a URL in the format http(s)://www.ex-ample.com.

  d. In the *Target window* dropdown list, choose whether the link opens in the same window or a new browser window.

  e. Click *Save*.

You have added an attachment.

4.4.2 View attachment on the *Attachments* tab

If you want to view attachments, you have the following options:

For uploaded files or assets:

- You download an attachment directly.
- You combine one or more attachments into a ZIP file and download the ZIP file.

For linked documents or links:

- You follow a link. This action applies to links or linked documents.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose attachment you want to view.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Attachments* tab.
4. Now it's time for you to decide:

- You want to download an attachment directly
    a. In the attachment's line, click the *Download* entry in the *Download* column.

       Your operating system opens a dialog box where you can decide how to proceed with the ZIP file.
    b. Follow any instructions which may be described by your operating system.
- You want to download one or more attachments in a ZIP file:
    a. Select the checkboxes of the attachments.
    b. Click *Download files*.

       The selected files are combined in a ZIP file. Your operating system opens a dialog box where you can decide what to do with the ZIP file.
    c. Follow any instructions which may be described by your operating system.
- You want to follow a link:
    a. In the attachment line, in the *Download* column, click the *Follow Link* entry.

       The link is opened. This can be in the same browser window or in a new one, depending on your settings.

You will see the attachment.

4.4.3 View attachment linked to invoice or PO

> Note
>
> To learn how to link attachments with invoices and POs, see chapter *POs* on page 153.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose attachment you want to view.
2. Double click on the element.

   The detailed view will open.
3. Switch to the *Invoices* or *POs* tab.

4. Double click on the invoice or PO whose attachment you want to view.

   The *Edit Invoice* or *Edit PO* dialog box is displayed.

5. Select in the *Attachments* area:

   - Click *Download* to download and then open a linked file.

     The attachment is downloaded- Follow your operating system's prompts to open the attachment.

     Or

   - Click *Follow Link* to view a linked document or website.

     The link box is displayed.

You will see the attachment linked to an invoice or PO.

4.4.4 Deleting an attachment

Attention! Data loss!

You cannot reverse the deletion of attachments.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose attachment you want to delete.
2. Double click on the element.

   The detailed view will open.

3. Go to the *Attachments* tab.
4. Activate the checkboxes for the attachments that you want to delete.
5. Click *Delete*.

   A confirmation prompt is displayed.

6. Click *OK*.

You have deleted the attachments.

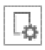
4.5 Additional Information

> **Note**
>
> Please note that the *Content Enrichment* feature described in this chapter is optional and thus 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 activity. This feature is called Content Enrichment. You can find out which types of information you can insert in chapter *Possible contents* on page 129.

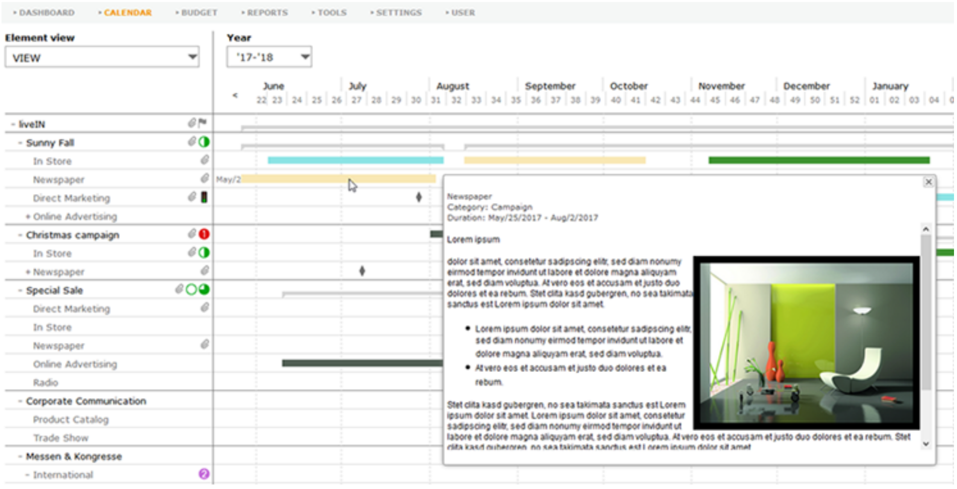
Display for a planning element

You can access additional information about a planning element by opening > *Element context menu > 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.

Display for a 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 via 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.

You can specify a default size in pixels for the tooltips at the timeline. The minimum size is 450 x 200 px, the maximum value is 1024 x 768 px. Also, the tool-tip size can be adjusted with the cursor.

Associated actions

- *Enriching or editing element with additional information* on the next page
- *Delete additional information on the element* on the next page
- *Enriching or editing timeline with additional information* on page 129
- *Delete additional information on the element* on page 129

4.5.1 Enriching or editing element with additional information

1. Starting from the top navigation, click *> Planner > Calendar* or *> Budget* and navigate to the line of the element you want to enrich with information.
2. Double click on the element.

   The detailed view will open.
3. In the *Quick Actions* area, click *Edit general element info* button.

   The *Edit general element info* dialog box will open.
4. If you want the information to be accessible by other users with access to the element, activate the checkbox above the editor.
5. Enter the content in the editor. For information about the editing options, see chapter *Additional Information* on page 126.
6. Click on *Save*.

You have created or edited additional information for the element.

4.5.2 Delete additional information on the element

Attention! Data loss!

You cannot reverse the deletion of information.

1. Starting from the top navigation, click *> Planner > Calendar* or *> Budget* and navigate to the line of the element whose additional information you want to delete.
2. Double click on the element.

   The detailed view will open.
3. In the *Quick Action* area, click the *Edit general element info* button.

   The *Edit general element info* dialog box opens.
4. If you want the information to be invisible to other users with access to the element, deactivate the checkbox above the editor.
5. If you really want to delete all information, remove all entries from the editor.
6. Click *Save*.

You have deleted additional information for the element.

4.5.3 Enriching or editing timeline with additional information

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the timeline you want to enrich with information.
2. To do so, double-click the timeline.

   The *Edit timeline* dialog box opens.
3. If you want the information to be accessible by other users with access to the element, activate the checkbox above the editor.
4. If necessary, adjust the default size of the tooltip in which the information is displayed.
5. Enter the content in the editor. For information about the editing options, see chapter *Additional Information* on page 126.
6. Click on *Save*.

You have created or edited additional information for the timeline.

4.5.4 Delete additional information on the element

Attention! Data loss!

You cannot reverse the deletion of information.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the timeline whose additional information you want to delete.
2. To do so, double-click the timeline.

   The *Edit timeline* dialog box opens.
3. If you want the information to be invisible to other users with access to the element, deactivate the checkbox above the editor.
4. If you really want to delete all information, remove all entries from the editor.
5. Click *Save*.

You have deleted additional information for the timeline.

4.5.5 Possible contents

You can insert the following content:

- *Text and special characters* below
- *Table* on page 132
- *Hyperlinks* on page 134
- *Images* on page 137

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

- *Slideshow* on page 139
- *PDF* on page 142
- *Reports* on page 144
- *HTML5 videos* on page 146

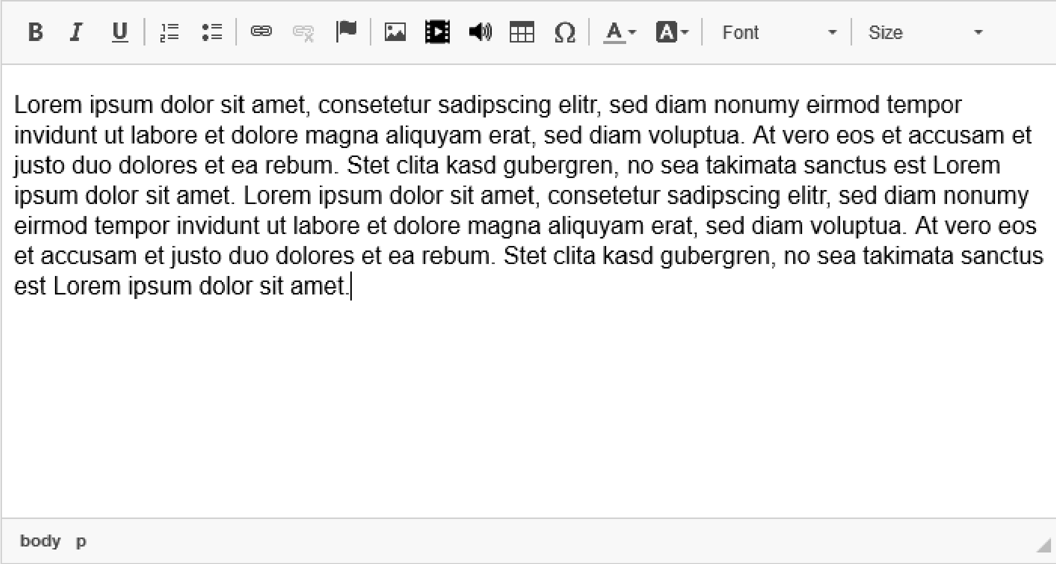
> Note
>
> The *Content Enrichment* function uses your browser's video player to play videos. Different browsers support different video formats. Therefore, please note the formats supported by your browser when integrating videos. If your BrandMaker system is accessed with various browsers, use the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

- *HTML5-Audio* on page 148

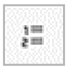
> Note
>
> The *Content Enrichment* function uses your browser's player to play audio files. Different browsers support different formats. Therefore, please note the formats supported by your browser when integrating audio files. If your BrandMaker system is accessed with various browsers, use the MP3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

4.5.5.1 Text and special characters

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

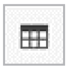


Enter the given text in the editor. Text is always left-justified. You can edit or update the text with the following functions:

Function	Description
	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 icon: 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	Font size

4.5.5.2 Table

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

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

Table Properties **tab**

Function	Description
Row	Enter the number of rows in the table.
Column	Enter the number of columns in the table.
Width	Enter the width of the table in pixels. For information in other units, refer to the tooltip of the field.
Height	Enter the height of the table in pixels. For information in other units, refer to the tooltip of the field.
Header	Choose whether to use the first row, the first column, or both as header elements. Text in header cells is marked in bold and centered by default.
Frame size	Enter the frame size in pixels.
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.

Function	Description
Content over-view	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.

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

4.5.5.3 Hyperlinks

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

- *Link to URL*: For example, you can link to Internet pages by linking to a URL. You also have the option of including files in the tooltip whose formats are not displayed directly in the tooltip, such as vector graphics or documents. For more information, see *Insert hyperlink to URL* on the facing page.
- *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 anchor and *Insert anchor and hyperlink to anchor* on the facing page.
- *Sending an e-mail*: When the user clicks on this kind of link, a mask for sending an e-mail opens. This enables functions such as orders for advertising materials to be implemented. For more information, see *Establishing a hyperlink to e-mailing* on page 136.

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.

4.5.5.3.1 Insert hyperlink to URL

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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 .
3. The *Link* dialog box is displayed.
4. Optional: Enter a display text.
5. Select the link type *URL*.
6. Specify the log and URL.
7. Optional: If required, edit the other properties of the hyperlink on the *Target page* and *Advanced* tabs.
8. Click *OK*.

The hyperlink has been added in the editor.

4.5.5.3.2 Insert anchor and hyperlink to anchor

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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. Click *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.

4.5.5.3.3 Establishing a hyperlink to e-mailing

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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.

4.5.5.4 Images

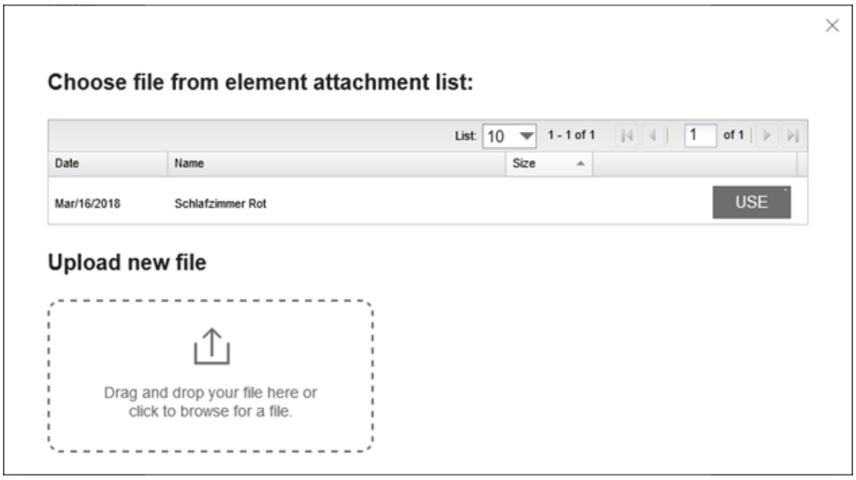
> Note
>
> Only pixel graphics can be displayed directly in the additional information. Vector graphics can only be included via hyperlink.

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

1. In the editor, position the cursor where you want to insert the pixel graphic.
2. Click .
3. The *Image properties* dialog box is displayed.
4. 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.

5. 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.

6. 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.

7. Edit the image properties. Refer to the following sections for detailed information when doing so.
8. 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.
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 standard setting. 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.
Inner cell spacing	Enter the distance of the text to the cell boundary in pixels.
Heading	Enter a heading for the table.
Content over-view	Enter a content overview for the table.

Link and *Advanced* tabs

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

4.5.5.5 Slideshow

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

Note

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

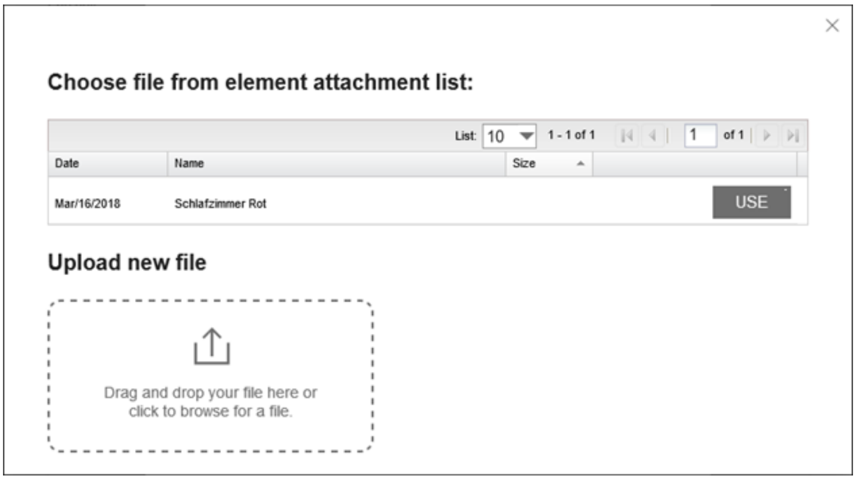
Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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 or video 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 *Slideshow* dialog box:

Function	Description
Title	Enter a title for the selected element. The title is displayed below the element in the slideshow.

Function	Description
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.

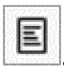
Advanced settings tab

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

4.5.5.6 PDF

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

1. In the editor, position the cursor where you want to insert the PDF.
2. Click .
3. The *PDF* dialog box is displayed.
4. Now it's time for you to decide:
    - 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.
    - 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.

The file will be uploaded as an attachment to the element and will appear in the attachment list.

c. Click the *Use* button next to the PDF.

- You want to use an asset of the *PDF* file type:

a. Click *Browse Media Pool*.

The asset search is displayed.

b. Browse for the PDF. For detailed information on an asset search, refer to the Media Pool module user manual.

c. Activate the checkbox next to the PDF.

d. Click *Apply*.

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

5. Edit the properties of the PDF. For more detailed information, refer to the section below.
6. 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.
LinkText	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.

Function	Description
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 screen is displayed in full height in the window. • *Width fill*: The content or a screen 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.

4.5.5.7 Reports

Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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.
Scaling	Define how the content is displayed in the window: • *No scaling*: The content is displayed unscaled. • *Height fill*: The content or a screen is displayed in full height in the window. • *Width fill*: The content or a screen 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 scal-ing.

4.5.5.8 HTML5 videos

Note

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

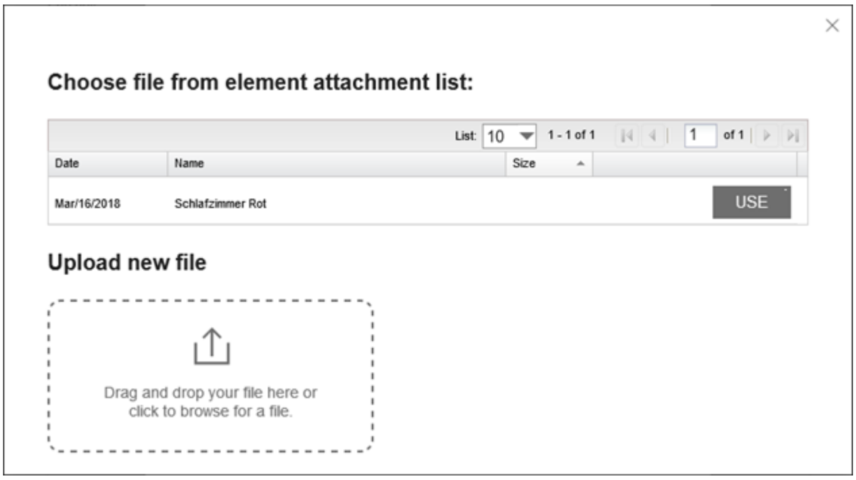
Prerequisites

You have opened the editor for editing the content. To access the editor for a planning element, go to the detailed view of the element and then via 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.

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 Info 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.

4.5.5.9 HTML5-Audio

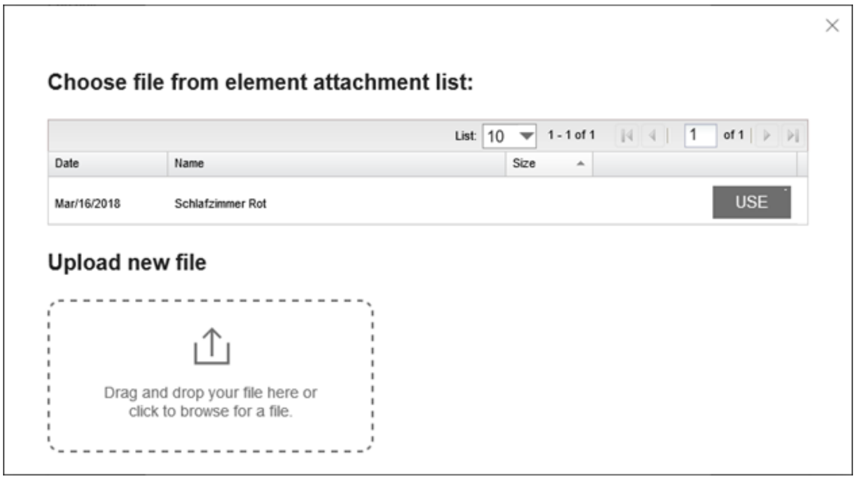
Prerequisites

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 via 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.

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.

4.6 Expenses

To keep track of your budget and associated expenses at all times, you can manage POs, invoices, and other costs for each planning element.

- Planned expenses: You map the expenses that you plan but have not yet incurred through POs. You can create any number of POs for each element, either as a standard order or as a blanket order and associated call orders. POs have a calculation status that can be open and closed. If a PO is open, the Planner calculates that expenses can still be incurred from it. For more information, see chapter *POs* on page 153.
- Actual expenses: You manage actual expenses through invoices. You can create as many invoices as you want for each element.
  Invoices can be assigned to POs; this assignment allows you to cross-calculate planned and actual expenses for a correct overall picture in the budget load.
  For more information on invoices, see chapter *Invoices* on page 158.
- Overall spending picture: The budget load summarizes the planned and actual expenditures and provides you with an overall view. The budget load totals the following parts:
  - Invoices that are not assigned to a PO
  - Invoices that are assigned to closed POs
  - The value of opened POs if the assigned invoice amounts are smaller than the PO value
  - Invoices assigned to opened POs, if the invoice amounts are greater than the PO value

  The chapter *Example of calculation of budget load* on the facing page provides you with a detailed and illustrative example.
- Other budget data
  - 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. For more information, see chapter *Fees* on page 162
  - Charges: Fees are percentage or absolute amounts that are incurred as costs on activities in specific channels. You apply for the marketing development funds for a set invoice and assign them to a corres-

pondingly authorized user, an approver. For more information, see chapter *Marketing development fund (MDF)* on page 164.

Note

To learn how to display the different data in the budget view, see chapter *Presentation of budget data* on page 169.

Standard budget data

In the budget view, you can display the following data from the above information:

Name	Description
Committed	Budget data of the *Commissioned* type is calculated from the respective sum of the values of the standard POs, the remaining values of the blanket orders and the values of the release orders. Note that you manage the POs in the detailed view of an element. For more information, see chapter *POs* on page 153
Actual	The total of the invoices. Note that you manage the invoices in the detailed view of an element. For more information, see chapter *Invoices* on page 158
Projected	The projected budget is calculated from the open orders (Committed) and invoices (Actual). The exact rule is explained in chapter *Example of calculation of budget load* below.
Residual budget	This is calculated by subtracting the projected budget value from the planned value.
Trade Allowances	The total of the received marketing development funds. For more information, see chapter *Marketing development fund (MDF)* on page 164

You can access the budget to create your own budget calculations based on formulas and display them in a column. For more information, see chapter *Customized budget calculations* on page 177.

4.6.1 Example of calculation of budget load

The projected budget is calculated from the following components:

- Invoices that are not assigned to a PO
- Invoices that are assigned to closed POs
- The value of opened POs if the assigned invoice amounts are smaller than the PO value
- Invoices assigned to opened POs, if the invoice amounts are greater than the PO value

The following items are created for an element:

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

In addition, the following invoices are assigned to the specified POs.

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 consider	Total	Remarks
Invoices that are not assigned to a PO	€ 100 + € 750 + € 1200 =	€ 2050	
Invoices that are assigned to closed POs	€ 500 + € 250 + € 700 =	€ 1450	PO A
The value of opened POs if the assigned invoice amounts are smaller than the PO value	€ 1500	€ 1500	PO C
Invoices assigned to opened POs, if the invoice amounts are greater than the PO value	€ 900 + € 1100 =	€ 2000	PO B
	Projected budget:	*€ 7000*	

4.6.2 POs

The expenses that you plan but have not yet incurred are represented by POs. You can create any number of POs for each element, either as a standard order or as a blanket order and associated release orders. POs have a calculation status that can be open and closed. If a PO is open, the Planner calculates that expenses can still be incurred from it.

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:

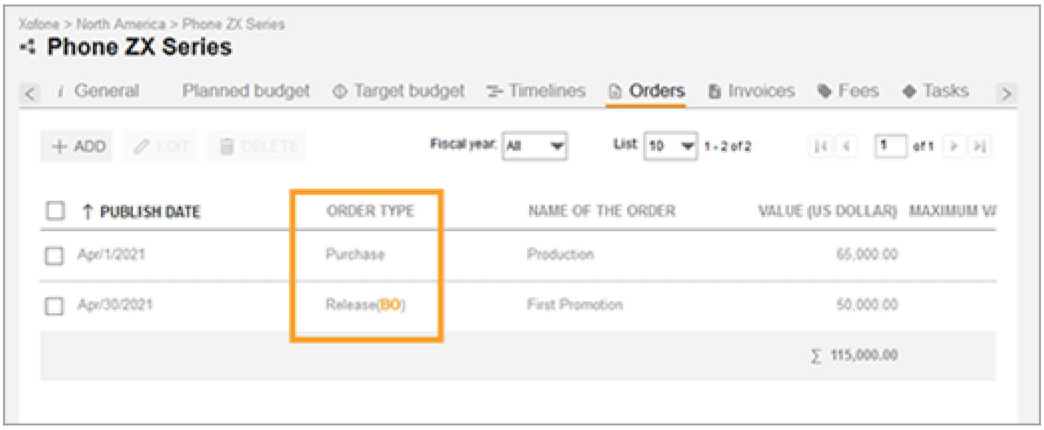
- *Standard orders*: A standard order is a self-contained unit; there is no dependency on other orders.
- *Blanket orders*: With blanket orders, Marketing buys a large package of services without knowing when or how they will be used within the organization. An example is airtime for commercials at a TV station, which is purchased once a year to get better prices.
- *Release orders*: When it is clear how the resources purchased with the blanket order will be used, a release 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 release order.

Relationship between blanket orders and release orders

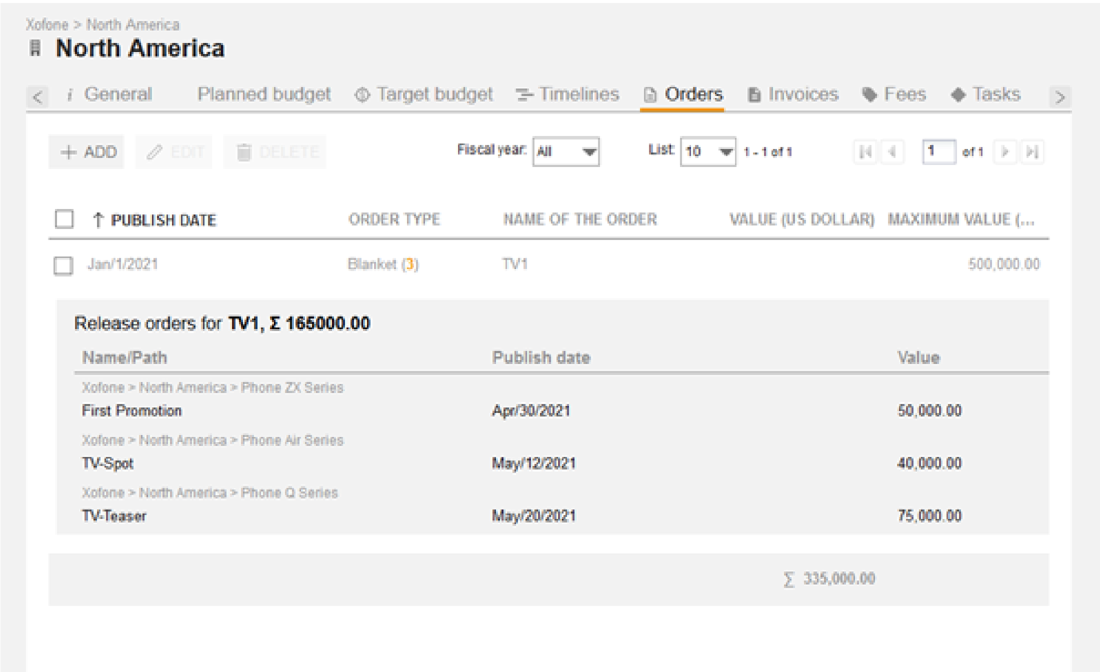
The blanket order must be created for the same or a parent element that is in a direct path to the element where the release order is created. Another condition is that the elements of the blanket order and the associated release orders must have the same working currency.

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 release orders:



Export and import

Orders of any type can be exported. Import is possible for standard and call orders. For details, please refer to chapter *Importing and exporting budget data* on page 209.

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 release orders.

Release orders also have the same data as standard orders with one exception: A release 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].
PO type	Specify whether the order is a standard, blanket order or a release order.
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.
Calculation status	Activate this checkbox to "freeze" the value of an order. The status of the PO is taken into account when the residual budget and projected budget are calculated. This field cannot be imported.
Calculation 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 calculation date of a created blanket order with an assigned call order must not be outside the runtime of the planning element.
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 freely enter text or choose an already saved entry.
Supplier	Define the supplier from whom the PO was received.
Responsible person	Define the responsible user.
Comment	Enter any additional information.

Property	Description
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 on them in the Attach-ments 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 residual budget. The residual budget is calculated by subtracting the assigned invoices from the order value.

Associated actions

- *Entering a PO* below
- *Edit PO* on the facing page
- *Delete PO* on page 158

4.6.2.1 Entering a PO

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element for which you want to enter a PO.
2. Double click on the element.

   The detailed view will open.
3. Go to the *POs* tab.
4. Click *Add*.

   The *Add PO* dialog box opens.
5. Enter the name of the PO.
6. Specify what type of PO it is: *Standard*, *Blanket* or *Release*. For more inform-ation, see chapter*POs* on page 153.
7. If you are creating a release order: Select the associated blanket order.
8. Enter the value. If it is a blanket order, enter the maximum value of the blanket order.
9. Set the calculation date.
10. If necessary, enter more properties. For more detailed information, see

chapter *POs* on page 153.

11. Click *Save*.

The PO has been created. The entered value is automatically entered in the corresponding cells of the *Committed* columns, where the calculation 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.

4.6.2.2 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. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose PO you want to edit.
2. Double click on the element.

   The detailed view will open.
3. Go to the *POs* tab.
4. Open the PO:
   1. Double click the PO.

   Or
   1. Activate the checkbox in the first column.
   2. Click *Edit*.

   The *Edit PO* dialog box is displayed.
5. Edit the properties.
6. Click on *Save*.

The PO is saved with the changed properties.

4.6.2.3 Delete PO

Attention! Data loss!

You cannot reverse the deletion of POs.

Note

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

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose PO you want to delete.
2. Double click on the element.

   The detailed view will open.
3. Go to the *POs* tab.
4. Activate the checkbox in the first column for the PO you want to delete. If you want to delete several POs, activate the checkboxes of all POs.
5. Click *Delete*.

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

The PO has been deleted.

4.6.3 Invoices

You manage actual expenses through invoices. You can create as many invoices as you want for each element.
Invoices can be assigned to POs; this assignment allows you to cross-calculate planned and actual expenses for a correct overall picture in the budget load.

> **Note**
>
> Assigning invoices to POs is important so that you get a coherent overall view of your budget.

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).
Payment status	Activate the checkbox if the invoice is paid.
Calculation date	Define the time at which the invoice is due so that the entered values can be transferred to the *Actual* column for the relevant month.
Booking date	Enter the booking date.
Order number	Enter the order number.
Reference number	Enter the reference number.
Invoice number	Enter the invoice number.
Cost center	Define the cost center to which the estimate is to be posted.
Cost type	Enter the cost type according to which the invoice is to be categorized. You can freely enter text or choose an already saved entry.
Supplier	Define the supplier who has issued the invoice.
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.

Property	Description
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 on them in the Attach-ments column.

Associated actions

- *Entering an invoice* below
- *Editing an invoice* on the facing page
- *Deleting an invoice* on the facing page

4.6.3.1 Entering an invoice

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose invoice you want to enter.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Invoices* tab.
4. Click *Add*.

   The *Add Invoice* dialog box opens.
5. Enter the name of 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].
6. Enter an amount for the invoice.
7. Set the calculation date.
8. If necessary, enter more properties. For more detailed information, see chapter *POs* on page 153.
9. Click on *Save*.

You have entered the invoice. The amount is entered automatically in gray font in the corresponding cells in the *Actual* columns in both the yearly budget and the month of the invoice.

4.6.3.2 Editing an invoice

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose invoice you want to edit.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Invoices* tab.
4. Open the invoices:
   1. Double click the invoice.

   Or
   1. Activate the checkbox in the first column.
   2. Click *Edit*.

   The *Edit Invoice* dialog box opens.
5. Edit the properties.
6. Click on *Save*.

The invoice is saved with the changed properties.

4.6.3.3 Deleting an invoice

> Attention! Data loss!
>
> You cannot reverse the deletion of invoices.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose invoice you want to delete.
2. Double click on the element.

   The detailed view will open.
3. Go to the *POs* tab.
4. Activate the checkbox in the first column for the PO you want to delete. If you want to delete several POs, activate the checkboxes of all POs.
5. Click *Delete*.

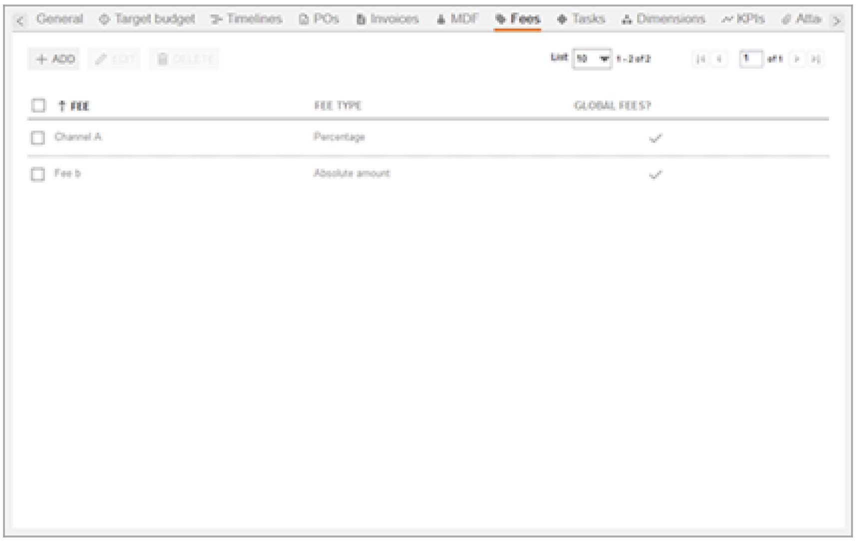
   A confirmation prompt is displayed.
6. Click *OK*.

The invoice is deleted.

4.6.4 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 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 *Customized budget calculations* on page 177.

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 *Importing and exporting budget data* on page 209.

Associated tasks

- *Assigning a fee to an element* on the facing page
- *Editing a fee amount for an element* on the facing page
- *Deleting a fee assignment* on page 164

4.6.4.1 Assigning a fee to an element

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element which you want to assign a fee to.
2. Double click on the element.

   The detailed view will open.
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*.

      The monthly fees per year are displayed.
   b. Define the fees for each month. If necessary, you can change the year to define additional months.
7. Click *Save*.

You have assigned a fee to the element.

4.6.4.2 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. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose fee amount you want to edit.
2. Double click on the element.

   The detailed view will open.
3. Go to the *Fees* tab.
4. Open the fee assignment:
   a. Double-click a fee.

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

The *Edit fee* dialog box opens.

5. Edit the fee amount. You can either use the globally defined fee values or enter values defined locally on the element.

   Attention! Data loss!

   If values defined on the element were used and then switch to the global values, the values defined locally on the element will be lost and cannot be restored.

6. Click *Save*.

You have edited the fee amount for the element.

4.6.4.3 Deleting a fee assignment

> Attention! Data loss!
>
> 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. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose fee you want to delete.
2. Double click on the element.

   The detailed view will open.

3. Go to the *Fees* tab.
4. Activate the checkbox in the first column for the PO you want to delete. If you want to delete several POs, activate the checkboxes of all POs.
5. Click *Delete*.

   A confirmation prompt is displayed.

6. Click *OK*.

You have deleted the fee assignment.

4.6.5 Marketing development fund (MDF)

Through marketing development funds, you allocate the allowances for financing your marketing activities in your planning. You apply for the marketing development funds for a set invoice and assign them to a correspondingly authorized user, an approver. MDF amounts can be requested or approved up to a maximum of 99,999,999,999.99 (of the corresponding currency). The released grants are displayed in the budget column *MDF*.

A request for advertising cost subsidies is always dated on the date the request is submitted. Therefore, the current fiscal year must be created in the Planner. A fiscal year is created if it can be selected in the calendar or in the budget view in the year dropdown list. 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.

Marketing development fund properties

Property	Description
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.
Approver	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.
Saving as a Favorite	If you frequently request a marketing 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.

Overview of MDF applications

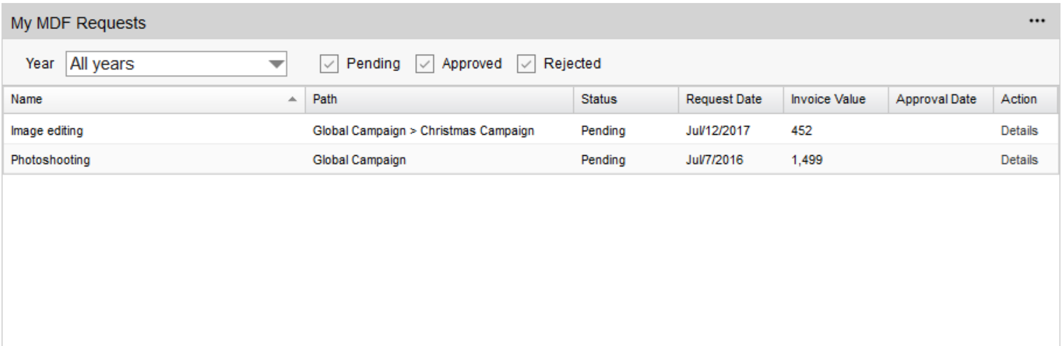
The dashboard helps you manage MDF applications through two dashlets:

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 30.



My pending MDF requests

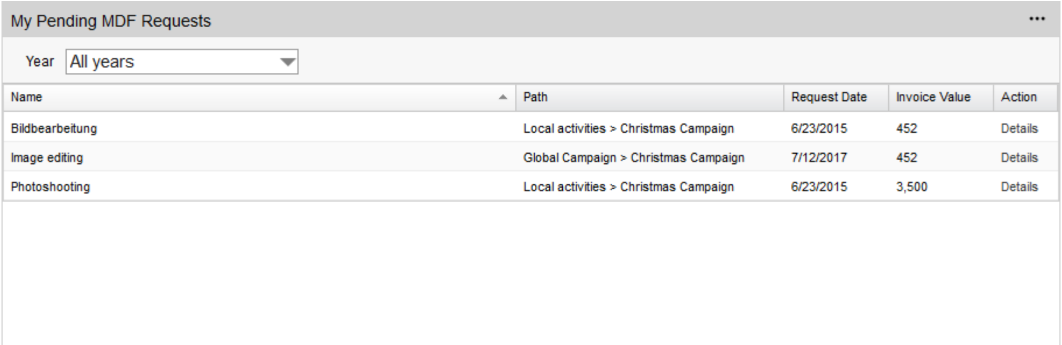
> *Note*
>
> You will only see this dashlet if you are registered as an approver. If you have any questions, please contact your system administrator.

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.



Associated actions

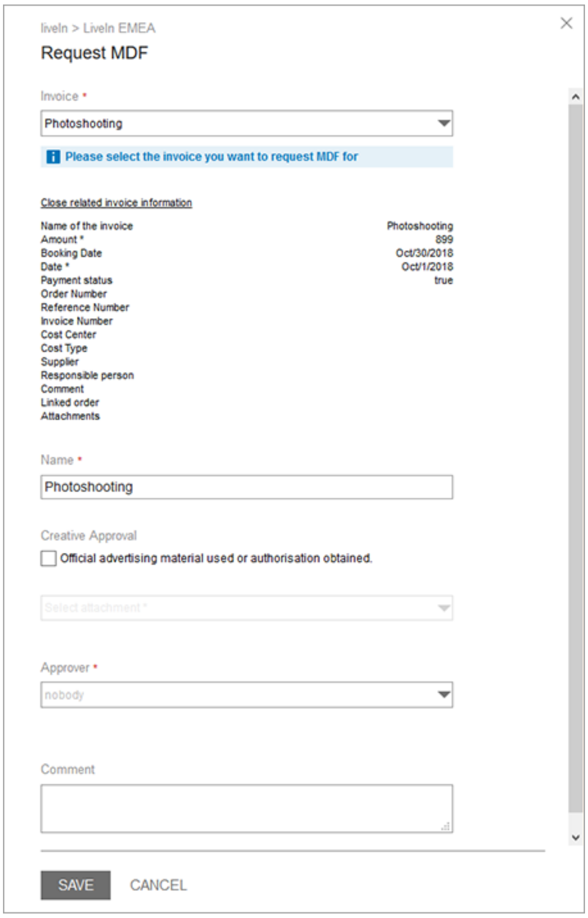
- *Requesting marketing development fund (MDF)* below
- *Processing a request for a market development fund* on the next page

4.6.5.1 Requesting marketing development fund (MDF)

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose market development fund you want to request.
2. Double click on the element.

   The detailed view will open.
3. Go to the *MDF* tab.
4. Click *Add*.
5. The *Request MDF* dialog box opens.
6. Edit the properties. For more information on the property, refer to chapter *Marketing development fund (MDF)* on page 164.
7. Click *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.



4.6.5.2 Processing a request for a market development fund

Prerequisites:You are registered as an Approver. If you have any questions, please contact your system administrator.

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

4.6.6 Presentation of budget data

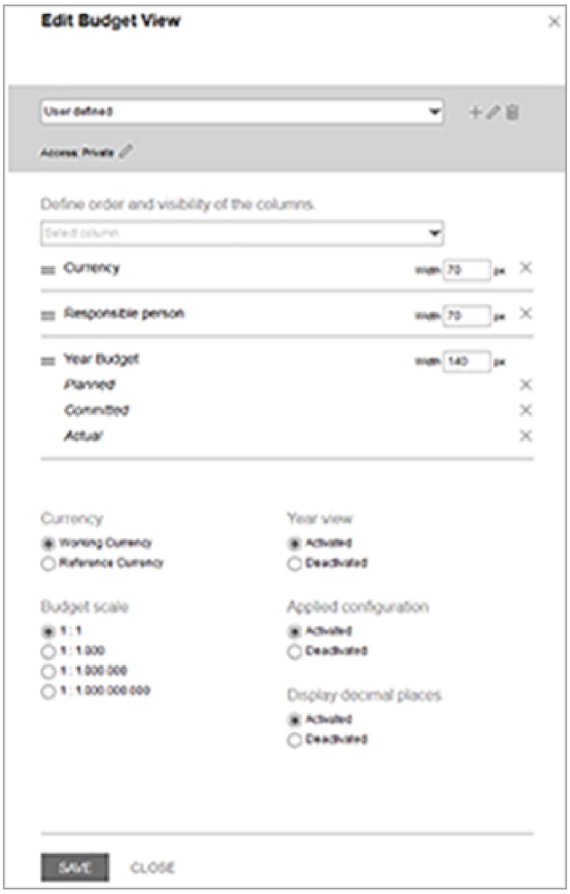
As you plan and manage your marketing activities, you enrich planning elements with budget data. In this chapter, you will learn how to present the data in a meaningful way for analysis and comparison.

Budget views

In the Planner, you use budget views to control which budget data is displayed. In addition, you can calculate your own data by entering formulas and display it for each element in a column, see chapter *Customized budget calculations* on page 177.The budget views are defined by you or another user. Where necessary, saved views can be published for all 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 > *Planner* > *Budget* > *Budget views* > *Default 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.

Hints in the event of inconsistencies

The 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 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 *Residual budget* 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.

Displayable data and settings

The following data and settings are possible:

Standard budget data

For each element, you can display the budget data from the planning phase (planned and target budget) as well as from the management phase, such as *Committed*, *Actual*, or *Residual budget*. For detailed information on the data from the management phase, refer to the chapter *Expenses* on page 150.

Customized budget calculations

You can access the budget to create your own budget calculations based on formulas and display them in a column. For more detailed information, see the chapter*Customized budget calculations* on page 177.

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

Basis attributes of the elements

You can show the following basic attributes in separate columns:

- Responsible person
- Runtime
- External ID

- Element ID
- Element type
- Element notes (See the detailed view of the *General* tab)

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 box for the dimension for this element opens.

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.In the budget view, you can selectively show the dimensions with the values for each element.

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. 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 *Plan*, *Target*, *Committed*, *Actual*, *Projected*, *Residual* budget and *MDF*. If the use of a secondary exchange rate is activated in your system, you can choose between primary and secondary exchange rate. Note that now the budget view can simultaneously display data in the reference currency calculated with both exchange rates. In this case, if you enter values directly in the budget view, this data will be converted to the working currency using whichever exchange rate is applied.

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

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	1,150,560
1:1,000	1,150
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
1,566.99	1567
12,356.12	12,356
18,542.50	18,543
1,500.00	1,500

Associated actions

- *Create a budget view* below
- *Applying a budget view* on the next page
- *Editing a budget view* on the next page
- *Deleting a budget view* on page 177

4.6.6.1 Create a budget view

1. Click > *Planner* > *Budget* > *Budget views* > *Edit 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 *Saved view access settings* dialog box opens.

6. Choose whether to publish the view for all Planner users or for specific user groups.
7. Click *OK*.
8. In the dropdown list, select the columns to be included in the view. For an overview of the possible data, refer to chapter *Presentation of budget data* on page 169. If the use of a secondary exchange rate is activated in your system, you can choose between primary and secondary exchange rate for the standard budget data.
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.

4.6.6.2 Applying a budget view

1. Choose > *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 apply.

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

4.6.6.3 Editing a budget view

Prerequisites

You have already created a budget view.

1. Click > *Planner* > *Budget* > *Budget views* > *Edit 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 *Saved 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 Data.
    - Change the order of the data 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.

4.6.6.4 Deleting a budget view

Prerequisites

You have already created a budget view.

> Attention! Data loss!
>
> You cannot reverse the deletion.

1. Click > *Planner* > *Budget* > *Budget views* > *Edit 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*.

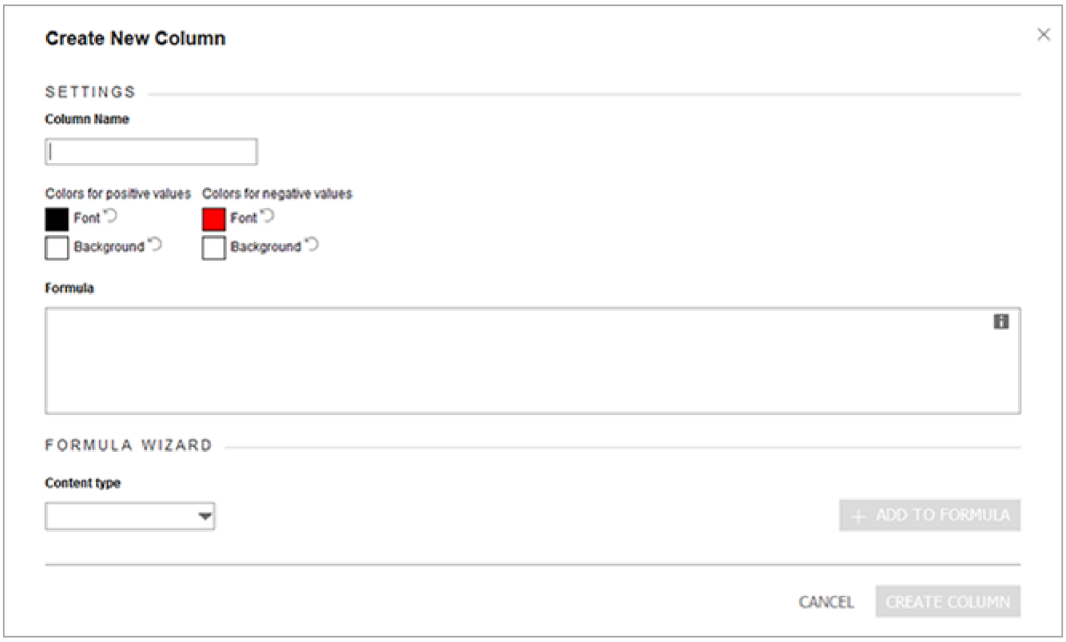
The budget view is deleted.

4.6.7 Customized 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:

- +, -, /, * as well as (and)
- Default budget values: Planned, Target, Committed, Actual, Projected budget, Residual Budget and MDF, see chapter *Expenses* on page 150
- *Fees* on page 162
- Exchange rates
- Numbers



Standard budget data, fees and exchange rates are specified on a time basis. Note for planned budgets that the total value of a timeline 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. If the use of a secondary exchange rate is activated in your system, you can choose between primary and secondary exchange rate.

Of course, you can also include custom budget calculations in a budget export. See chapter *Export planning data* on page 192.

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 Planner, you are managing various 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:

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

$_{Net}$: Net planned budget

$_{Planned}$: Planned budget

$_{\%}$: Rate of percentage fee

$_{Abs:}$: Total of the 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 *Creating custom budget calculations* on the next page

Note: Prerequisites for correct display is that an administrator has created the fees. In addition, the fees must be assigned to the elements, see chapter *Assigning a fee to an element* on page 163 and the plan budget for the planning elements must be entered.

Associated tasks

- *Creating custom budget calculations* on the next page
- *Editing custom budget calculations* on page 182
- *Publishing custom budget calculations* on page 182
- *Deleting custom budget calculations* on page 183

4.6.7.1 Creating custom budget calculations

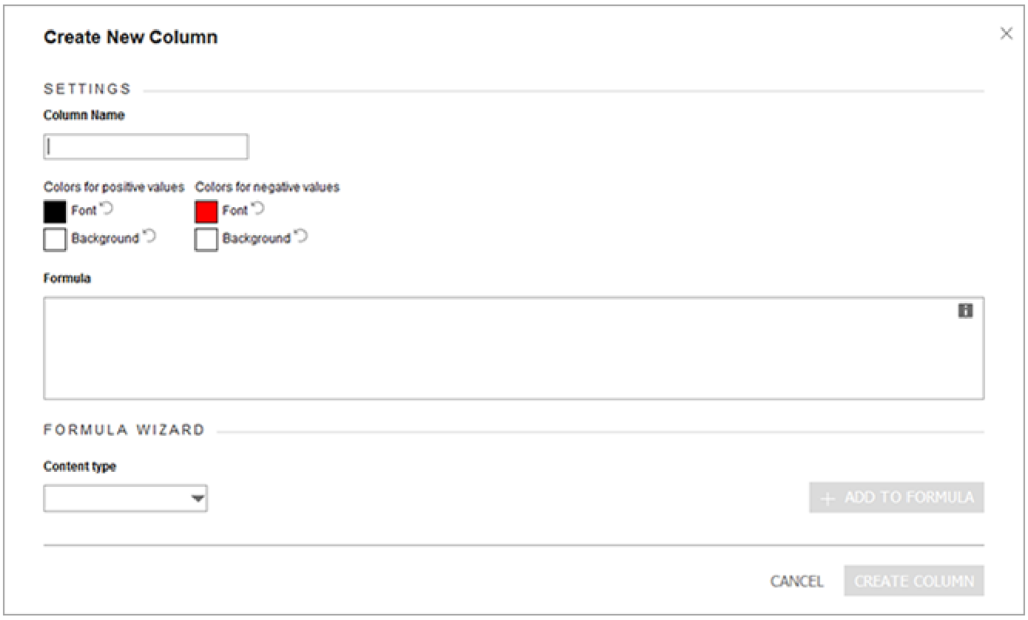
You want to calculate the net planned budget for the month of January. The formula for calculation corresponds to the example in chapter *Customized budget calculations* on page 177: BNet = BPlan - (BPlan * F% + Fabs /(1 + Fabs))

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. Starting from the top navigation, click > *Planner* > *Budget* > *Budget views* > *Edit 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 *<Fee - Sum of absolute value fees - January>* entry is added in the *Formula* field.

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

4.6.7.2 Editing custom budget calculations

1. Starting from the top navigation, click > *Planner* > *Budget* > *Budget views* > *Edit 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.

4.6.7.3 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 *Create a budget view* on page 175.

4.6.7.4 Deleting custom budget calculations

Attention! Data loss!

You cannot reverse the deletion of a custom budget calculation. All entries are irrevocably deleted.

1. Starting from the top navigation, click > *Planner* > *Budget* > *Budget views* > *Edit 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*.

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

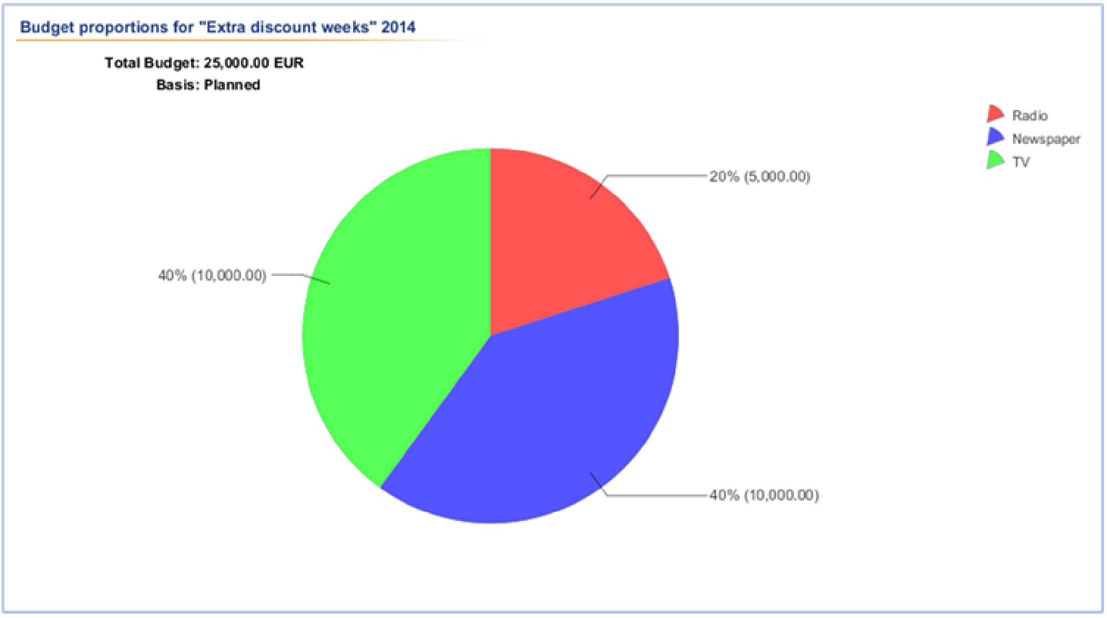
The *Edit Budget View* dialog box closes. The column is no longer displayed in the budget.

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

5

Measurement and reporting

In this phase, you measure the performance of your activities, evaluate the costs and create reports. This activates you to make a statement about the success of your activities at any time, make new decisions based on this and adjust your planning accordingly.



This includes the following functions

- *Measure target achievement* on the facing page
- *Manage digital campaign resources* on page 195
- *Export planning data* on page 192
- *Reports and graphics* on page 196

5.1 Measure target achievement

Use key performance indicators (KPIs) to document and evaluate the achievement of your marketing activities. KPIs are defined and created centrally by an administrator. In addition, KPIs can be organized into sets by the administrator. If you have any questions about how they are defined and how they work, contact your administrator.
As a user, you assign KPIs to planning elements and edit them.

> Note
>
> If the reference currency has to be converted, this is always done with the primary exchange rate for KPIs.

KPI types

During the assignment you will encounter two different types of KPIs, *Measurement* and *Calculated*. With a KPI of the *Measurement* type, you directly document a result of your marketing activities, for example, the *Number of visitors*, *Number of contact requests* or *Clicks*.

KPIs of the *Calculated* type are calculated using other KPIs, for example Lead conversion rate = <Number of contact requests>/<Number of visitors>*100.0.

In the detailed view on the KPI tab, the types are indicated by the following icons:

- Measurement:
- Calculated:

Due date of a KPI

You select a measurement date for a KPI. On this date, the KPI must be evaluated for a correct assessment of the marketing activity. Accordingly, KPIs of the *Measurement* type must have been processed by this date. For KPIs of the *Calculated* type, this applies to the KPIs required for calculation.

The dashboard helps to keep track of which KPIs need to be processed soon with the *KPI evaluation* dashlet: The dashlet shows KPIs whose evaluation is overdue ( ) or must be done in five days at the latest ( ). Only the KPIs of elements that you can access are displayed.

Overall evaluation for a planning element

With the target or threshold value, you define which value should be reached for a KPI. A target achievement percentage is automatically calculated from the comparison with the actual value.

EXAMPLE

A set consisting of the following KPIs is assigned to an event:

TYI	MEASURE ...	KPI	WEIGHT	TARGET/THRESH...	VALUE	ACHIEVEMENT	INFORMATION
		Number of visitors	1	300.00	258.00	86 %	
		Lead Conversion Rate	1	30.00	32.95	110 %	
	Mar/3/2022	Number of contact requests	1	80.00	85.00	106 %	
						101 %	

A target value of 300 is entered for the *Number of visitors* measurement value, but only 258 visitors were counted. This corresponds to a target achievement of 86%. The yellow marker refers to a global score for target achievement that is managed by the administrator. In this case, the target achievement for the indicator is in the yellow range.

For the *Number of contact requests* KPI, a target of 80 was set; in fact, 85 contact requests were achieved, which corresponds to a target achievement of 106%.

The Lead conversion rate is calculated from these KPIs with the formula *<Number of contact requests>/<Number of visitors>**100.0 to 32.95%. The target was 30%.

The average of all indicators provides a statement about the overall success of the marketing activity. Ultimately, the weighting is relevant here. In the screenshot above, all KPIs are included in the overall result with a weighting of 1. But if, for example, the number of visitors is an important factor for evaluating success, the weighting can be increased to a factor of 3, for example. In this case, the overall result of the target achievement is in the yellow area instead of the green area:

TYI	MEASURE ...	KPI	WEIGHT	TARGET/THRESH...	VALUE	ACHIEVEMENT	INFORMATION
		Number of visitors	3	300.00	258.00	86 %	
		Lead Conversion Rate	1	30.00	32.95	110 %	
	Mar/3/2022	Number of contact requests	1	80.00	85.00	106 %	
						95 %	

Associated actions

- *Assign KPI to a planning element* below
- *Assign KPI set to a planning element* on the next page
- *Edit KPI* on page 191
- *Deleting KPI* on the next page

5.1.1 Assign KPI to a planning element

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element you want to assign a KPI.
2. Double click on the element.

   The detailed view will open.
3. Go to the *KPIs* tab.
4. 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.
5. 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.
6. Click *Add*.

   The *Add KPI* dialog box opens.
7. Select an indicator from the *KPI* selection list.

   The dialog box changes depending on the type of KPI selected.

8. Enter the required data such as *weighting*, *target/threshold* and, if required, further information for other users.
9. Click *Save*.

You have added the KPI.

5.1.2 Assign KPI set to a planning element

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element you want to assign a KPI set.
2. Double click on the element.

   The detailed view will open.
3. Go to the *KPIs* tab.
4. Click > ⚙ > *KPI Sets* and select one of the displayed sets.

The KPIs associated with the set are added to the list on the *KPIs* tab. Edit the KPIs to define weighting, target/threshold and measurement date, see *Edit KPI on the facing page*.

5.1.3 Deleting KPI

> Attention! Data loss!
>
> You cannot reverse the deletion. In particular, before deleting, check if the KPI is needed for the calculation of another indicator.

1. Starting from the top navigation, click > *Planner* > *Calendar* or > *Budget* and navigate to the line of the element whose KPI you want to delete.
2. Double click on the element.

   The detailed view will open.
3. Go to the *KPIs* tab.
4. Activate the checkbox in the first column for the KPI you want to delete.
5. Click > ⚙ > *Delete*.

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

You have deleted the KPI.

5.1.4 Edit KPI

You are editing a KPI in different situations:

- You have added a KPI set to a planning element and now want to enter the important properties such as weighting, target/threshold or the measurement date.
- You want to enter the value for a measurement KPI.

1. Starting from the top navigation, click *> Planner > Calendar* or *> Budget* and navigate to the line of the element whose KPI you want to edit.
2. Double click on the element.

   The detailed view will open.
3. Go to the *KPIs* tab.
4. If you edit a KPI that is 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.
5. 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.
6. Double click the KPI you want to edit.

   The *Edit KPI* dialog box opens.
7. Edit the properties as desired.
8. Click *Save*.

You have edited the KPI.

5.2 Export planning data

You use this export function if you want to obtain current planning status, e.g. in financial planning the planned versus the actual status or in scheduling an overview of the activities within a period. 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 setting of the year and the year view, a filtering of the elements as well as in the budget area the setting of the budget columns have an effect on the export result.

1. Select whether you want to export the scheduling or the financial planning:
   - Scheduling: Click > *Planner* > *Calendar*.
   - Financial planning: Click > *Planner* > *Budget*.

   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. Select the year whose data you want to export.
3. Filter the planning elements if you only need the data for specific elements.
4. If you are exporting financial planning:
   a. Specify whether you want to export the data on a monthly or quarterly basis.
   b. Select the budget view that you want to export.
5. Click .

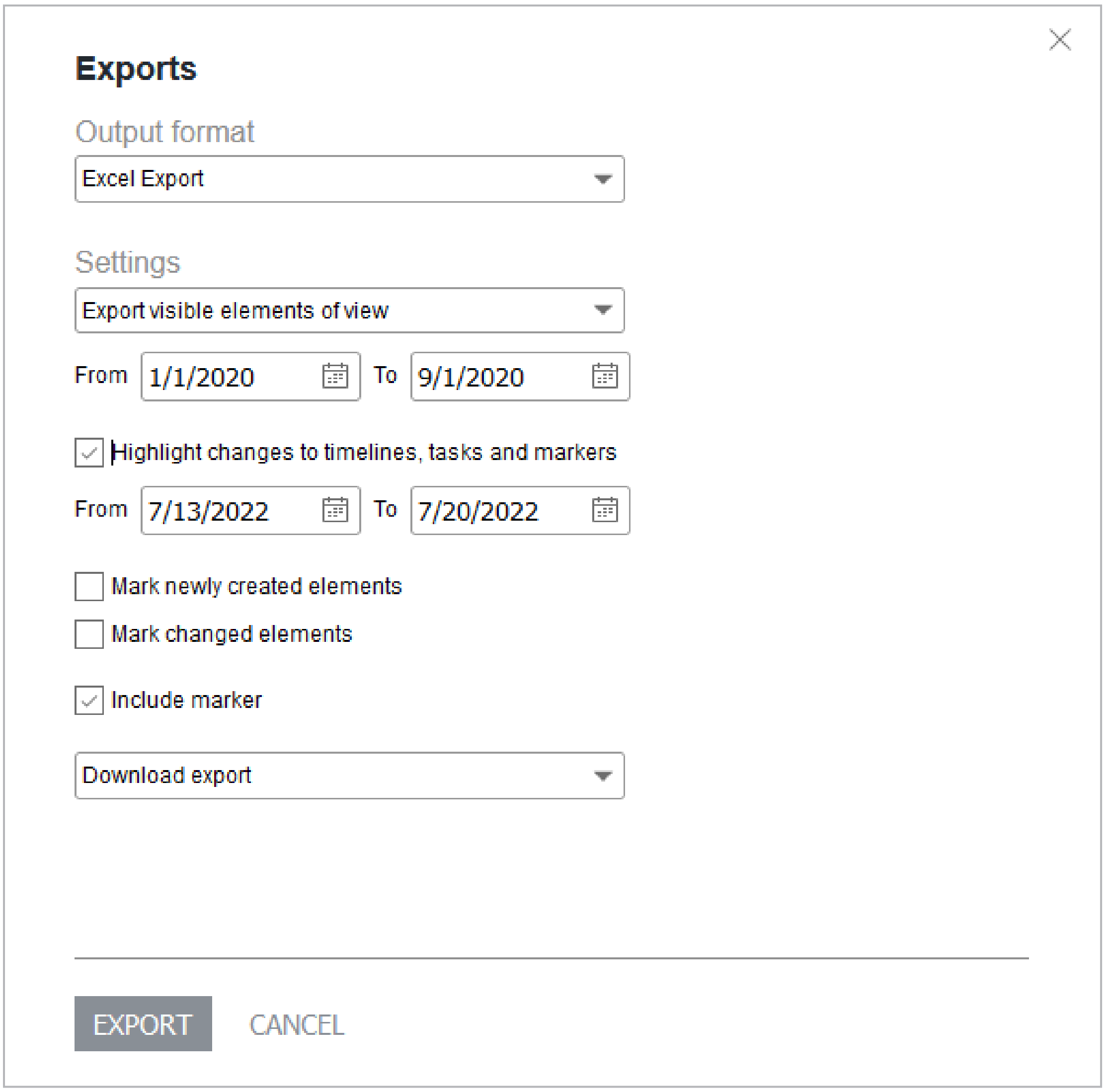
   This opens the *Export planning* dialog box.
6. From the dropdown list in the Output format area, select:
   - PDF Export if you want to export the marketing plan as a PDF file (only available under > Calendar).
   - Excel Export if you want to export the marketing plan as an XLSX file.
7. From the top 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.

8. Activate the *Highlight changes* checkbox to highlight the changes made within a certain period of time in the exported file.

   This expands the input screen.
9. Select the time span within which the changes were made.
10. Specify whether newly created and/or changed planning elements are highlighted.
11. To make the export clearer, activate the *Highlight parent elements* checkbox if necessary.
12. If you want to include the markers of the planning elements in the export, activate the *Include markers* checkbox.
13. Select from the drop-down list below:
    - *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.
      a. 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 Planner.
      b. You can enter text for the message, if required. You can also send the e-mail without any message text.
14. Click *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.


Exports
Output format
Excel Export
Settings
Export visible elements of view
From 1/1/2020 To 9/1/2020
Highlight changes to timelines, tasks and markers
From 7/13/2022 To 7/20/2022
Mark newly created elements
Mark changed elements
Include marker
Download export
EXPORT
CANCEL

5.3 Manage digital campaign resources

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. 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.

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 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 graphic reports showing, for example, the budget allocation, planned and actual comparison, activity overview, and KPI evaluations. You can use the reporting functions integrated into the Marketing Planner to create various reports using up-to-date data and to stage them graphically at the click of a button.

> **Note**
>
> If the reference currency has to be converted, this is always done with the primary exchange rate for reports.

The Planner offers you the following types of reports:

- *Project budgets* below
- *Budget comparison* on the facing page
- *KPI Evaluation* on page 199
- *KPI comparison* on page 200
- *KPI benchmarks* on page 201
- *Measures overview* on page 203
- *Tabular report* on page 204
- *Tops and flops* on page 205

5.4.1 Project budgets

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.

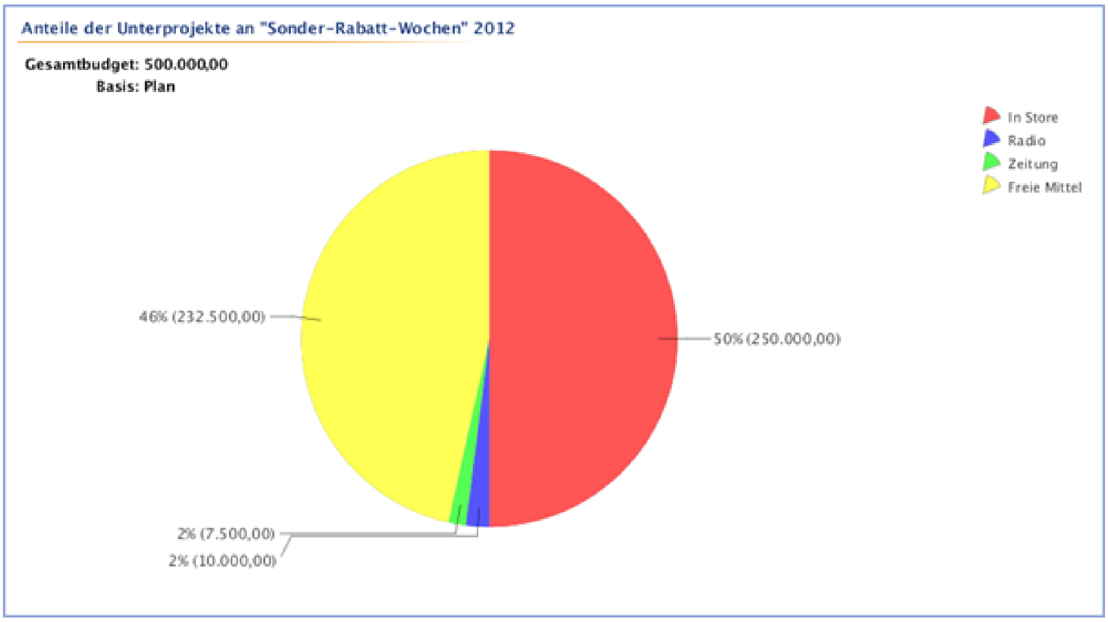
1. Click > *Planner* > *Reports* > *Project budgets*.
2. Choose the year of marketing planning.

   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. Click *Generate report*.

The report has been created. Click *Export* to save the generated diagram locally as a graphics file.



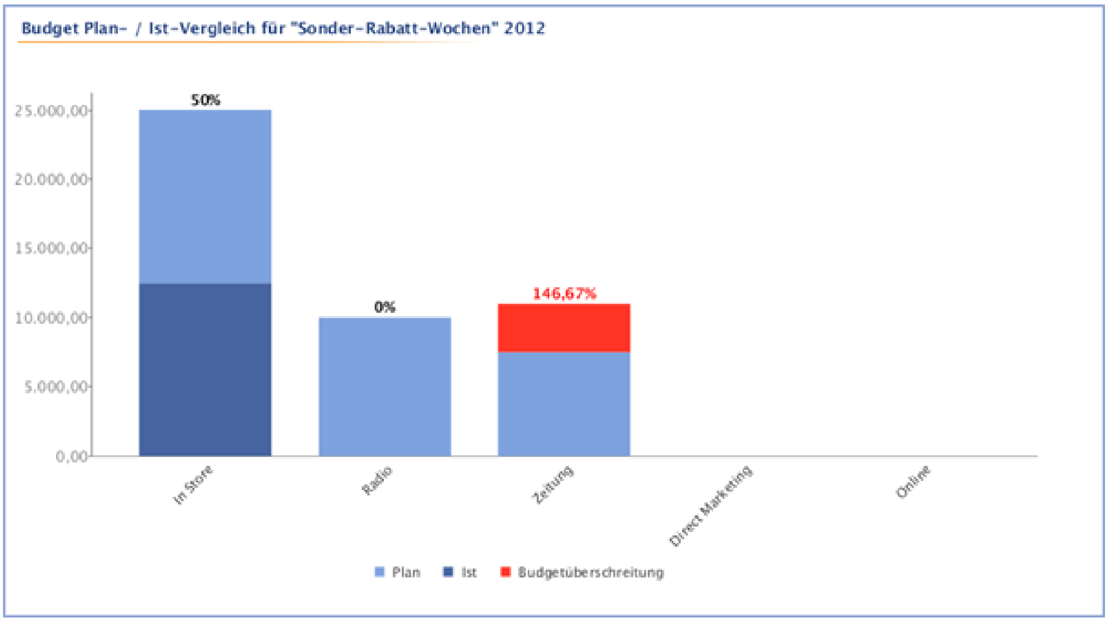
5.4.2 Budget comparison

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. Click > *Planner* > *Reports* > *Budget comparison*.
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 data basis* and *Second data 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. Click *Generate report*.

The report has been created. Click *Export* to save the generated diagram locally as a graphics file.



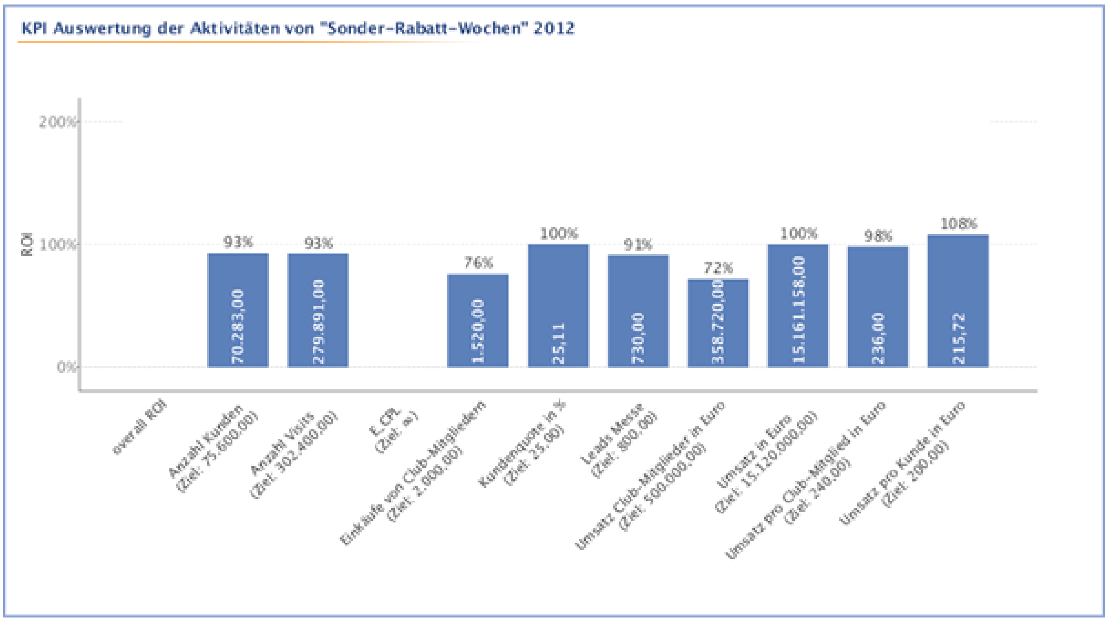
5.4.3 KPI Evaluation

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. Click > *Planner* > *Reports* > *KPI evaluation*.
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. Click *Generate report*.

The report has been created. Click *Export* 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 cut off. The percentage value is displayed above the bar.



5.4.4 KPI comparison

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. Click > *Planner* > *Reports* > *KPI comparison*.
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 filter* 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 project* 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. Click *Generate report*.

The report has been created. Click *Export* 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 cut off. The percentage value is displayed above the bar.

5.4.5 KPI benchmarks

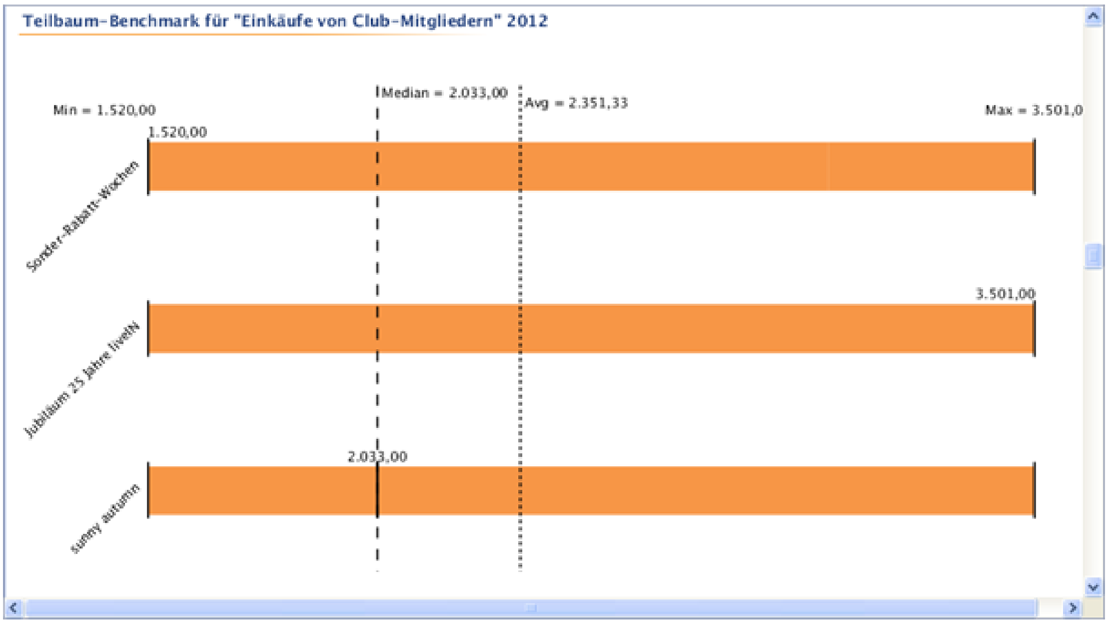
You require a bar chart that displays the minimum, maximum, and mean KPI values of the selected element of your marketing plan. You also want to generate the report based both on the values of the selected dimensions and on the sub-elements of the selected element.

1. Click > *Planner* > *Reports* > *KPI benchmarks*.
2. In the *Diagram based on* 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 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. Click *Generate report*.

The report has been created. Click *Export* 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.

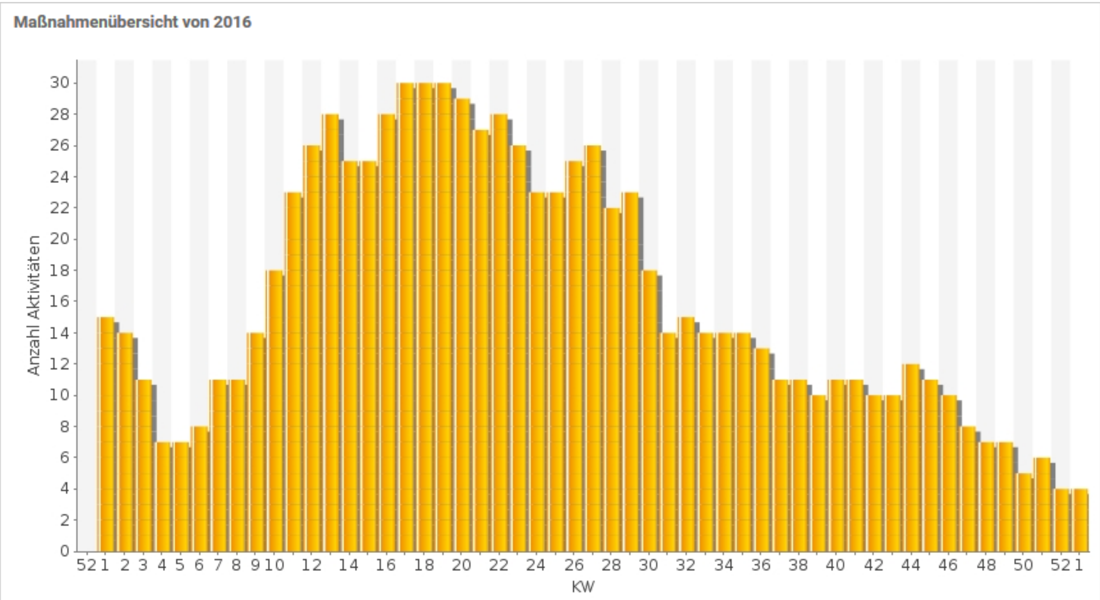


5.4.6 Measures overview

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. Click > *Planner* > *Reports* > *Measures overview*.
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 > *Planner> Settings* > *Calendar structure* > *Level 2* is 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. Click *Generate report*.

The report has been created. Click *Export* to save the generated diagram locally as a graphics file.



5.4.7 Tabular report

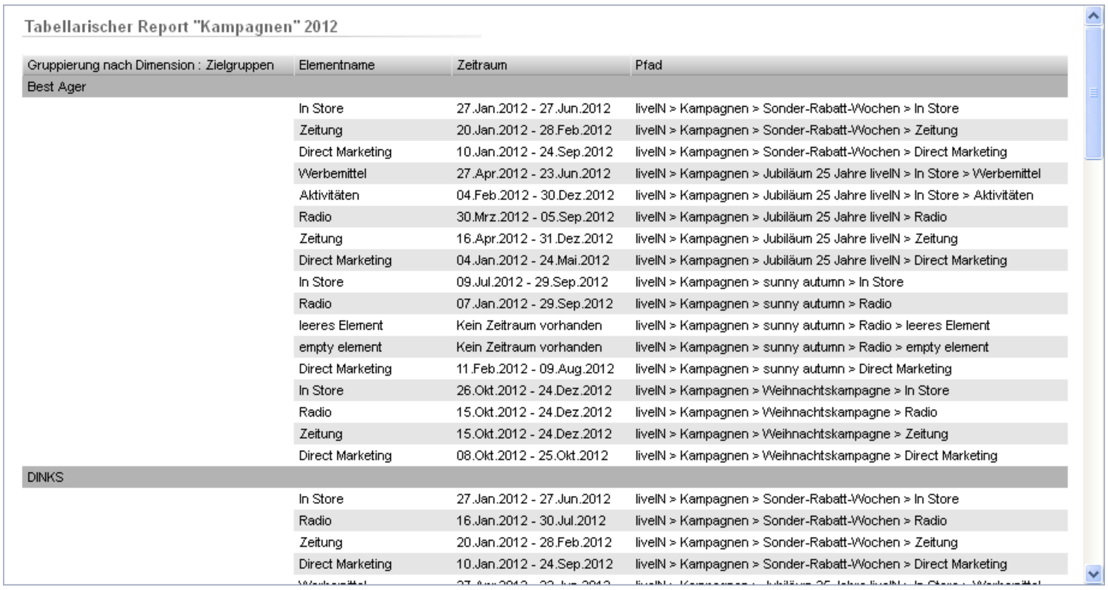
Choose the *Tabular report* report type to display specific elements of your marketing plan in a clear tabular form. For example, you can generate task lists, an overview of the planned measures grouped according to target group, a budget overview, or a list of the measures distributed to the cost centers (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.

1. Click > *Planner* > *Reports* > *Tabular report*.
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 set*.
    b. Select or 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. Click *Generate report*.

The report has been created. Click *Export* to save the report locally as an Excel file.



Tabellarischer Report "Kampagnen" 2012

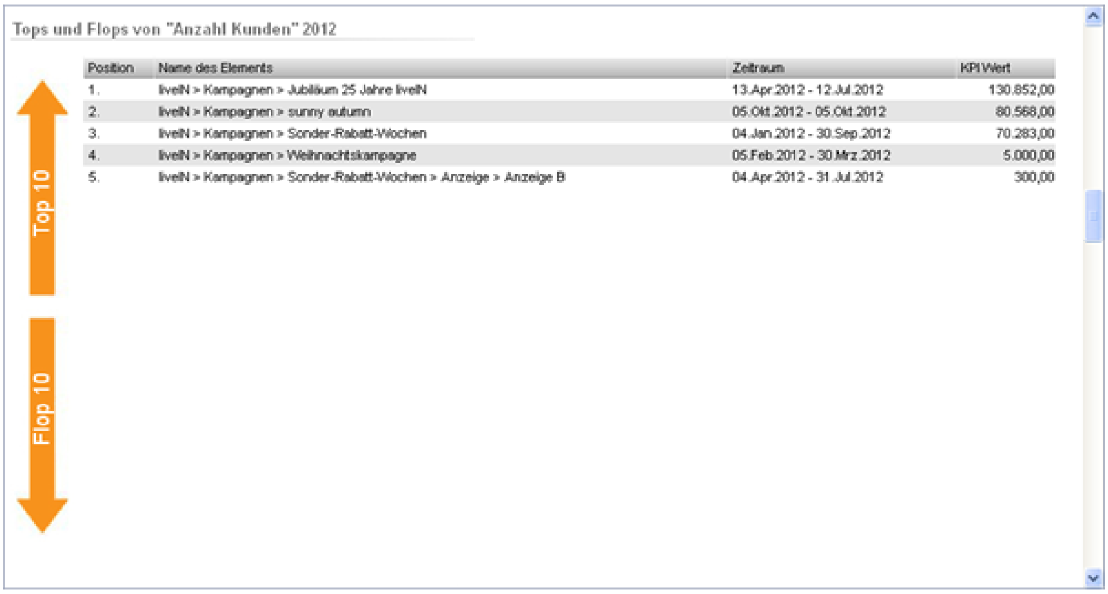
Gruppierung nach Dimension : Zielgruppen	Elementname	Zeitraum	Pfad
Best Ager			
	In Store	27.Jan.2012 - 27.Jun.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > In Store
	Zeitung	20.Jan.2012 - 28.Feb.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Zeitung
	Direct Marketing	10.Jan.2012 - 24.Sep.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Direct Marketing
	Werbemittel	27.Apr.2012 - 23.Jun.2012	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN > In Store > Werbemittel
	Aktivitäten	04.Feb.2012 - 30.Dez.2012	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN > In Store > Aktivitäten
	Radio	30.Mrz.2012 - 05.Sep.2012	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN > Radio
	Zeitung	16.Apr.2012 - 31.Dez.2012	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN > Zeitung
	Direct Marketing	04.Jan.2012 - 24.Mai.2012	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN > Direct Marketing
	In Store	09.Jul.2012 - 29.Sep.2012	liveIN > Kampagnen > sunny autumn > In Store
	Radio	07.Jan.2012 - 29.Sep.2012	liveIN > Kampagnen > sunny autumn > Radio
	leeres Element	Kein Zeitraum vorhanden	liveIN > Kampagnen > sunny autumn > Radio > leeres Element
	empty element	Kein Zeitraum vorhanden	liveIN > Kampagnen > sunny autumn > Radio > empty element
	Direct Marketing	11.Feb.2012 - 09.Aug.2012	liveIN > Kampagnen > sunny autumn > Direct Marketing
	In Store	26.Okt.2012 - 24.Dez.2012	liveIN > Kampagnen > Weihnachtskampagne > In Store
	Radio	15.Okt.2012 - 24.Dez.2012	liveIN > Kampagnen > Weihnachtskampagne > Radio
	Zeitung	15.Okt.2012 - 24.Dez.2012	liveIN > Kampagnen > Weihnachtskampagne > Zeitung
	Direct Marketing	08.Okt.2012 - 25.Okt.2012	liveIN > Kampagnen > Weihnachtskampagne > Direct Marketing
DINKS			
	In Store	27.Jan.2012 - 27.Jun.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > In Store
	Radio	16.Jan.2012 - 30.Jul.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Radio
	Zeitung	20.Jan.2012 - 28.Feb.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Zeitung
	Direct Marketing	10.Jan.2012 - 24.Sep.2012	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Direct Marketing

5.4.8 Tops and flops

You require a "hit list" of the elements for which the selected KPIs have performed best or worst.

1. Click > *Planner* > *Reports*> *Tops and flops*.
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 report*.

The report has been created. A graphic is created for each of the selected KPIs. Click *Export* to save the generated diagrams locally as a PDF file.



Tops und Flops von "Anzahl Kunden" 2012

Position	Name des Elements	Zeitraum	KPI Wert
1.	liveIN > Kampagnen > Jubiläum 25 Jahre liveIN	13.Apr.2012 - 12.Jul.2012	130.852,00
2.	liveIN > Kampagnen > sunny autumn	05.Okt.2012 - 05.Okt.2012	80.568,00
3.	liveIN > Kampagnen > Sonder-Rabatt-Wochen	04.Jan.2012 - 30.Sep.2012	70.283,00
4.	liveIN > Kampagnen > Weihnachtskampagne	05.Feb.2012 - 30.Mrz.2012	5.000,00
5.	liveIN > Kampagnen > Sonder-Rabatt-Wochen > Anzeige > Anzeige B	04.Apr.2012 - 31.Jul.2012	300,00

Main functions 6

This chapter explains functions of the Planner that you need at each stage:

- *Importing and exporting budget data* on the facing page: Specific budget data can be automatically imported and exported so that the user does not have to manually edit a large number of records

6.1 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

For more information on which properties can be imported and exported, see chapter *Exportable and importable properties* on the next page.

Allocation of data records to the 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 177.

> **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.

Further information

- *Export* on page 216
- *Import* on page 218

6.1.1 Exportable and importable properties

This chapter lists the properties that can be exported or imported.

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.

Setting	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	—

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External ID

> **Note**
>
> The External ID can only be imported but not exported.

Setting	Description	Importable	Cell style for import
External ID	ID of an element, must be mapped with the element ID.	Yes	Number

Target and planned budget

The following table describes the data for export and import of target and planned budget. All data can be exported.

Setting	Description	Importable	Cell style for import
Annual budget	Full year budget	Yes	Number
Reference period	Defines whether the budget is an annual or monthly budget. The calculation date defines year or month.	Monthly budget: Yes Annual budget: • Planning type Top-Down: Yes • Planning type Bottom-Up: No Total import: Yes	Text
Initial or adjusted	Specifies if it is an initial budget or a budget adjustment.	Yes	Text
Amount	In case of an initial budget of the total amount; in case of a budget adjustment of the delta	Yes	Standard

Setting	Description	Importable	Cell style for import
Calculation date	Assignment to a month and year	Yes	—
Creation date	Date of decision	Yes	—
Cost type	Cost type by which the budget is categorized.	Yes	Text
Comment	Enter any additional information.	Yes	Text

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.

Setting	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

Setting	Description	Importable	Cell style for import
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	—
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	—

Release order

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

Setting	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.

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

Invoices

The following table provides an overview of an invoice. All properties can be exported.

Setting	Description	Importable	Cell style for import
Name of the invoice	Enter a name for the invoice. If you do not enter a name, the invoice is displayed based on the following pattern in other lists (for example, for a request for a marketing development fund): [invoice date][invoice amount].	Yes	Text
Amount (in working currency)	Enter the amount of the invoice in the working currency of the planning element.	Yes, mandatory field	Number
Booking date	Enter the booking date.	Yes	Date
Date	Enter the invoice date.	Yes, mandatory field	Date
Payment status	Activate the field 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

Setting	Description	Importable	Cell style for import
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	—

Fees

Setting	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	—

6.1.2 Export

The budget data export function allows you to export the budget-related data of an element from the 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 timeline even further, e.g. to a month or a period of two weeks. Whether an invoice, PO, or target budget is included in an export depends on whether the *Calculation date* property is in the timeline 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.

Export file

The file in which the records are exported has the following characteristics:

- Format: The format of the file is XLSX.
- File name: The file name has the following structure: BrandMakerExport_[Date]_BudgetRelevantData.XLSX
- Table setup: All of the data is written in the first table of the Excel file. The first line contains the names of the exported properties. The subsequent lines contain the data records.

Associated task

- *Export budget data* on the next page

6.1.2.1 Export budget data

1. Click > *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 POs: Select the timeline 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. Click *Export*.

The data is exported and written to an Excel file.

6.1.3 Import

The budget data import allows you to automatically import a large amount of budget-related data to the 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:

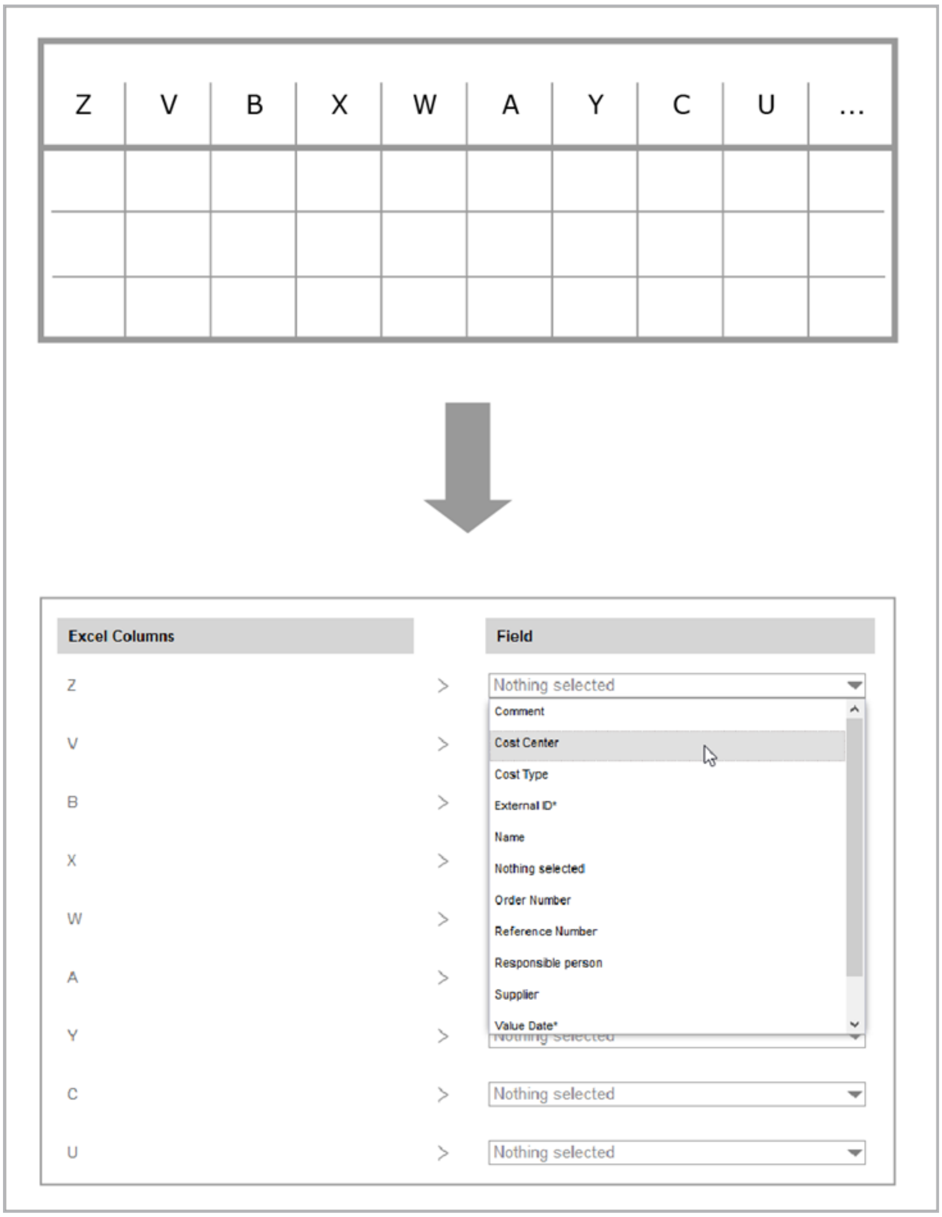
1. The file complies with the following specifications:
   - Microsoft Excel 2010 or Microsoft Excel 2013, XLSX file format.
   - Maximum file size: 20 MB
   - The structure corresponds to the specifications in chapter *File structure* on page 223.

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 *Exportable and importable properties* on page 210.

> Note
>
> Export the fields if you require an Excel file with appropriately formatted columns. For more information, see chapter *Export budget data* on the previous page.

Map data to be imported to the properties in the 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 properties in the Planner. This means that you can select a property in the Planner for each column. The mandatory fields (marked with an *) must be mapped. Each property in the 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 property to it in the Planner. The Excel file can therefore contain much more data than is actually necessary for the import.

Manually created and imported data

The 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 decides in a system setting which behaviors are activated in your system. 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 over-written 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 calculation date.
- You import the objects whose calculation 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 an order number, and this column must be imported (see previous section *Mapping data to be imported to the properties in the Planner*).

When linking invoices to POs, you can also decide to activate the calculation status for linked orders to "freeze" the value. In such cases, the PO will be considered manually created and cannot be changed by an import.

Please note that you can link an invoice to exactly one PO; if multiple links to a PO are detected during an import, the invoices will not be imported. Details will be displayed in the Log section.

If you want to link the invoices, but no linkable POs are found during the import, the invoices will still be imported. Detailed information is provided in the Log section.

Associated tasks

- *Import* on the next page

6.1.3.1 File structure

The import file must be configured as follows:

- Only the first table of the file is used.
- The top line contains the definitions that describe the values entered in the column, such as *Invoice amount*. The labels in the table do not have to match the labels of the properties in the Planner. Each invoice and each PO or planned budget of an element is entered in subsequent lines. There cannot be any empty lines.
- 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 *Amount* and *Calculation date* mandatory fields.
- *Standard orders* and *Target budgets*: In addition to the ID, the file must contain filled columns for the *Value* and *Calculation date* mandatory fields.
- *Call orders*: In addition to the ID, the file must contain filled columns for the mandatory fields *Value*, *Calculation date* as well as the *ID* of the associated blanket order.
- *Fees*: in addition to the ID, the file must contain a filled column for the *Fee name* mandatory field. Names entered in the column must exactly match the name of a fee created under > *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.

An overview of all properties that can be imported can be found in chapter *Exportable and importable properties* on page 210.

Example: File structure for invoices

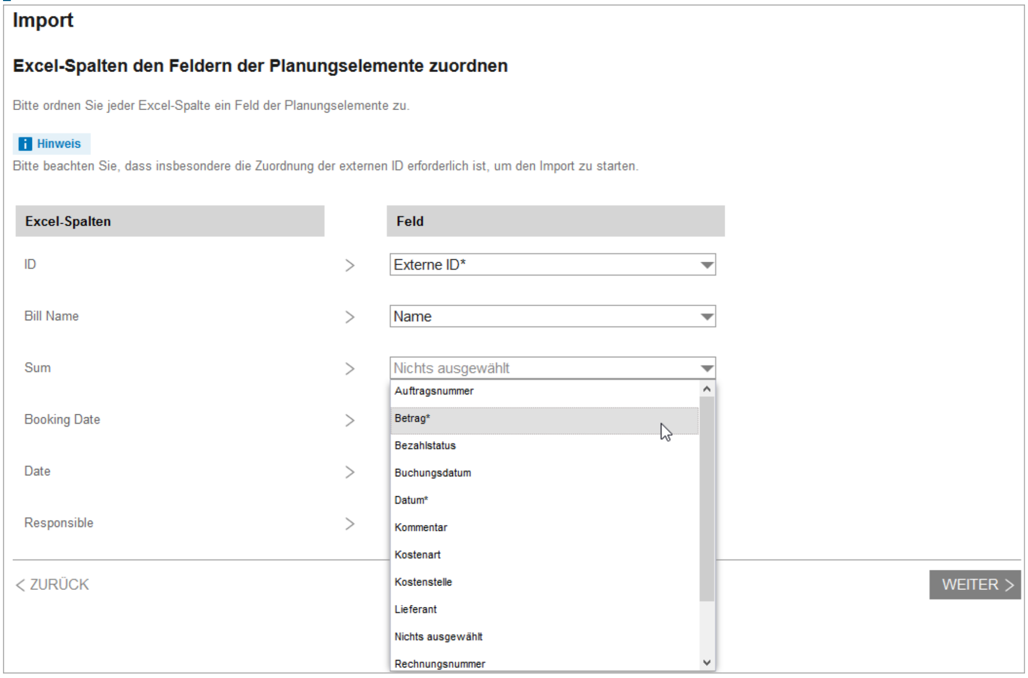
	A	B	C	D	E	F
1	**ID**	**Bill Name**	**Sum**	**Booking Date**	**Date**	**Responsible**
2	bbb1234	Order broschures	500	19.05.2015	28.05.2015	John Doe
3	bbb1235	Photoshooting	2500	20.05.2015	28.05.2015	Max Mustermann
4	bbb1235	Layout	1599	23.05.2015	30.05.2015	Jane Public
5	bbb1236	Order Leaflets	450	21.05.2015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

6.1.3.2 Import

1. Click > *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*.

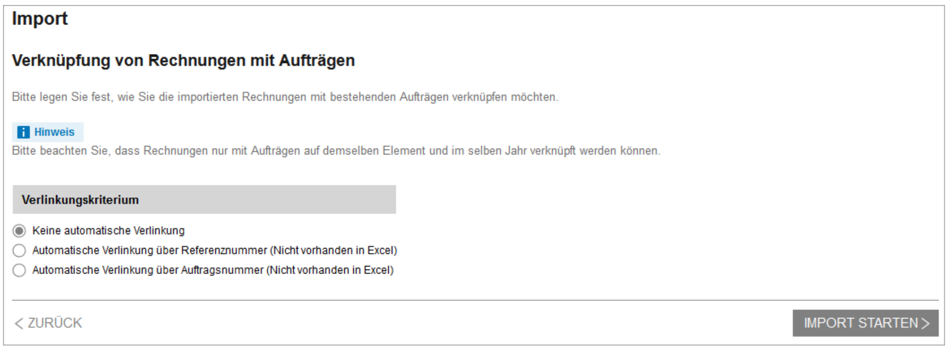
You now go to the second step of the import. All columns of the Excel file are listed here.

7. For each column whose content you need, select the appropriate property in the Planner.



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 following applies:

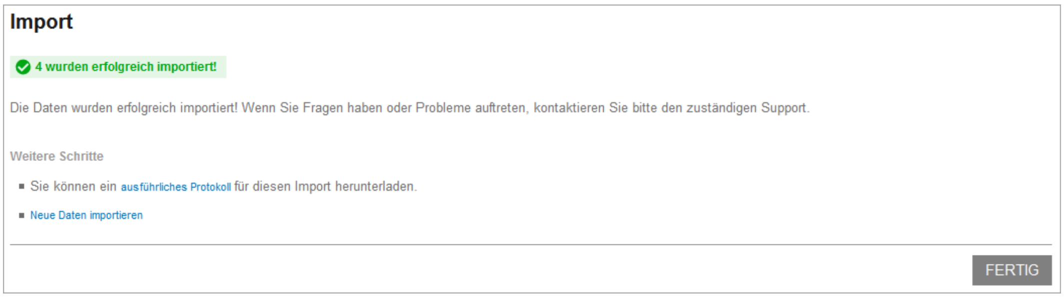
        - A column with reference numbers or PO numbers exists in the Excel file.
        - You have mapped this column with the respective property in the previous step.

     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.



6.1.4 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.

1. Click > *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.