Uptempo

# Plan

## Manual

November 2024

EN

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We would be grateful to be notified of any errors you may discover. Just send us an e-mail to documentation@uptempo.io.

# Contents

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# 1

# Welcome!

An activity is any targeted action or measure taken by your company to promote its products or services, attract customers, or increase sales. Activities can take various forms, such as advertising, public relations, sales promotion, direct marketing, online marketing, events or social media marketing. The aim of these activities is to attract the attention of the target group, arouse interest in the products or services offered, and ultimately promote sales.

Within Uptempo you map these activities in a hierarchical structure. You can map the financing of your activities by linking them to an investment. Uptempo also allows you to calculate projected revenue. You can kick-off a process linked to the activity.

## Recommended for New Users

If you are unfamiliar with Uptempo's Plan we recommend that you familiarize yourself with the following topics:

- *Planning Activities* on page 25
- *Create a New Activity* on page 34
- *Filtering and Grouping Activities* on page 70



 

## 1.1 New and Changed

In version November 2024, the following new features and changes were introduced in *Plan*:

### Allocate percentage amounts to multi-select options

Multi-select list attributes on activities now support setting percentage allocations for selected list options. When this feature is enabled on a multi-select list attribute, you can assign a percentage to each selected list option to represent its "weight" relative to the other options, or how the attribute as a whole should be split between the selected options.

See the Release Notes November 2024 for a detailed description of all changes.

## 1.2 Further Documentation

This page provides links to documents containing additional information:

- Financial Management
- Job Manager User Manual
- Job Manager Administration Manual

For a complete overview of all Uptempo documentation, please refer to the Uptempo Knowledge Base.

## 1.3 Style Conventions

Notes appear in a dark gray box.

Warnings appear in a red framed text box.

Paths to follow are written like this: *Click > x and then > y.*



 

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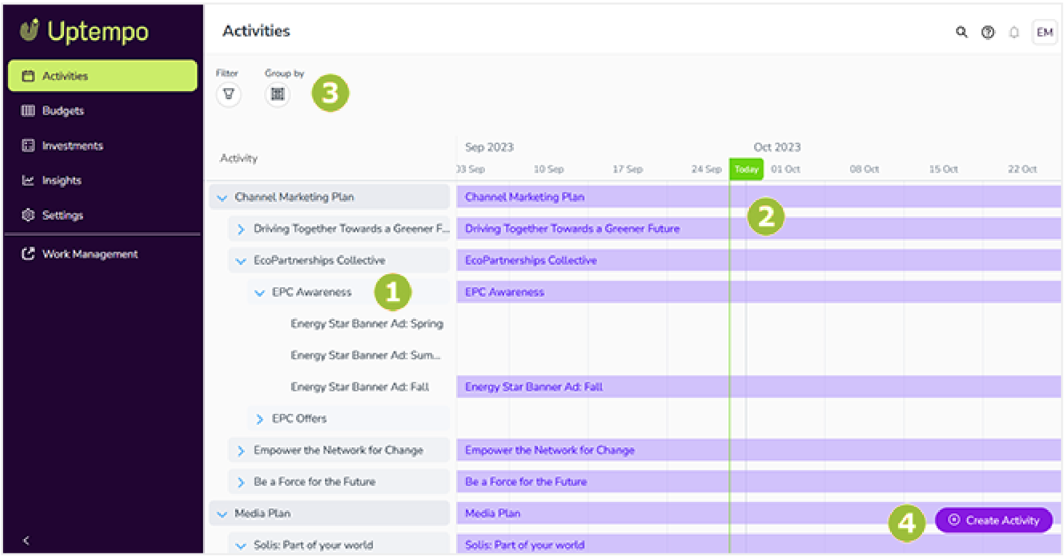
# Structure

# 2

To get to the planning section of Uptempo, click *Activities* in side navigation. Click the numbers in the screenshot below to find out more about the different sections.




## Related Actions

- *Create a New Activity* on page 34
- *Editing an Activity* on page 63
- *Editing the In-Market Period* on page 65
- *Synchronizing Data* on page 76
- *Deleting an Activity* on page 78

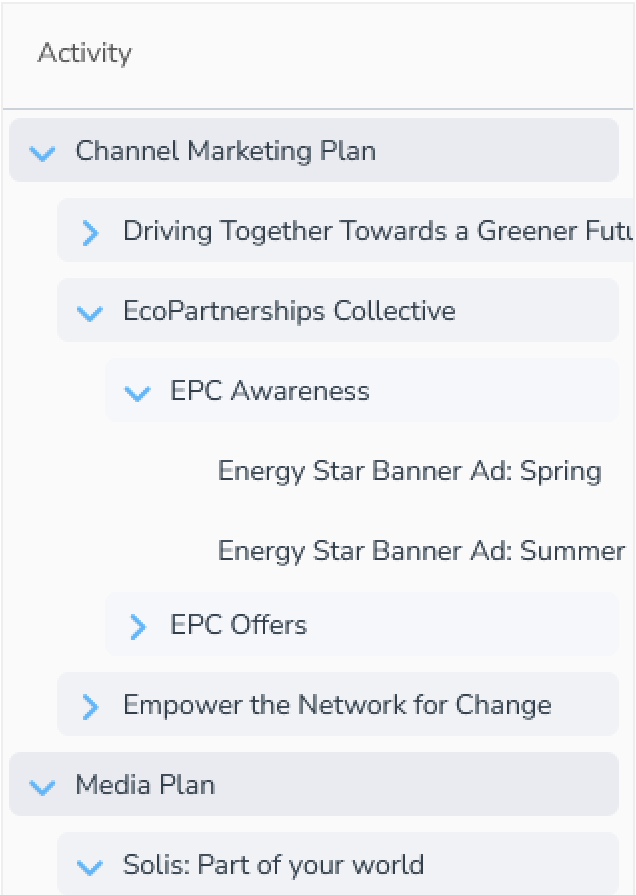


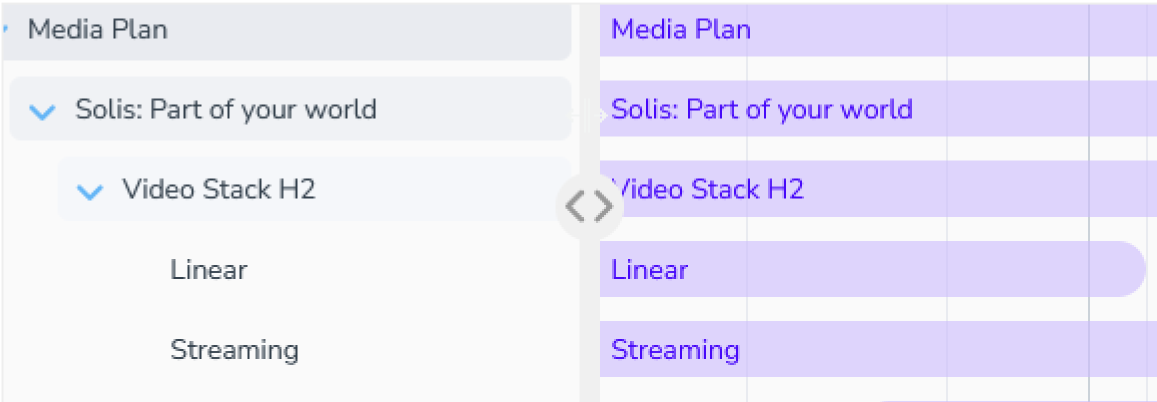
## 2.1 Activity Hierarchy

On the left side of the *Activity* tab, the activity hierarchy is displayed. The hierarchy shows the activities you are permissible to see in alphabetical order. You use activities to describe your future plans and how they scale down to detailed actions.

> Note
>
> You may see different activities in this area than your colleagues. Which activities you have access to is determined by the administrators. Contact your system administrator if you have any questions.




If the width of the hierarchy area is too small or large for your tasks, hover the right border of the area with the cursor. The cursor display changes to and a light gray band is displayed for the border:




Drag-and-drop the border to the desired size.

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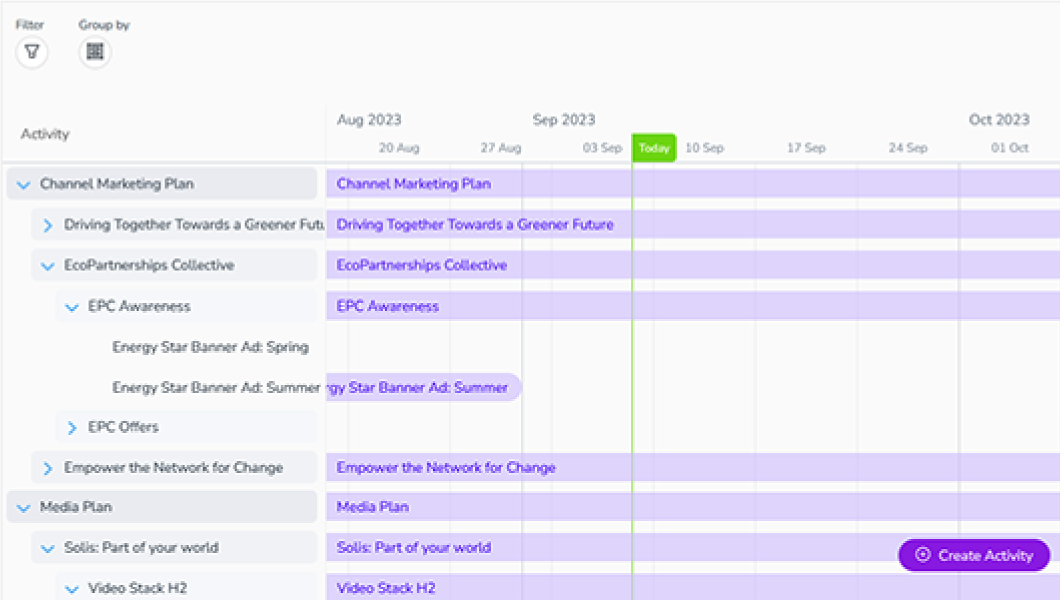
# 2.2 Timeline View

The *Timeline View* shows you the in-market periods of the activities in a calendar:




The current day is marked by the vertical green line for better orientation.

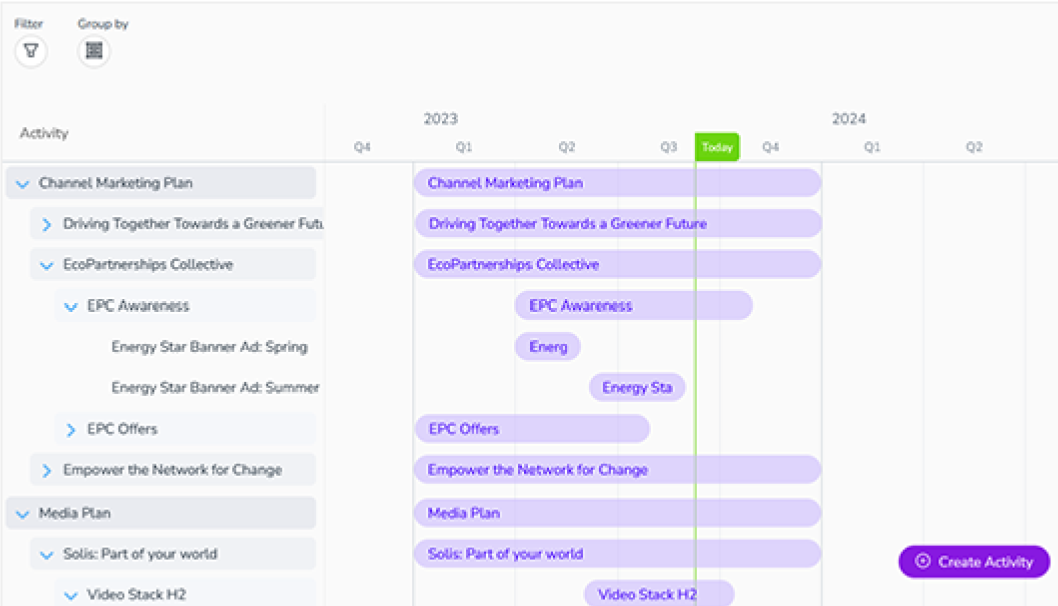
If necessary, you can change the size of the time span displayed to get a better overview. To do this, use the control elements on the right above the timeline view:


Select the desired resolution in the dropdown or switch between the resolutions using the +/- buttons.

Alternatively, hold down the CTRL/CMD key and use the mouse wheel to set the desired zoom.

> **Note**
>
> A changed zoom setting is reset when you leave the *Activities* page.

The desired section is displayed immediately. In the following screenshot you can see for example a year overview.




You can switch to *Summary* view by clicking the button above *Timeline* view. Clicking opens *Timeline* view again.

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## Related Actions

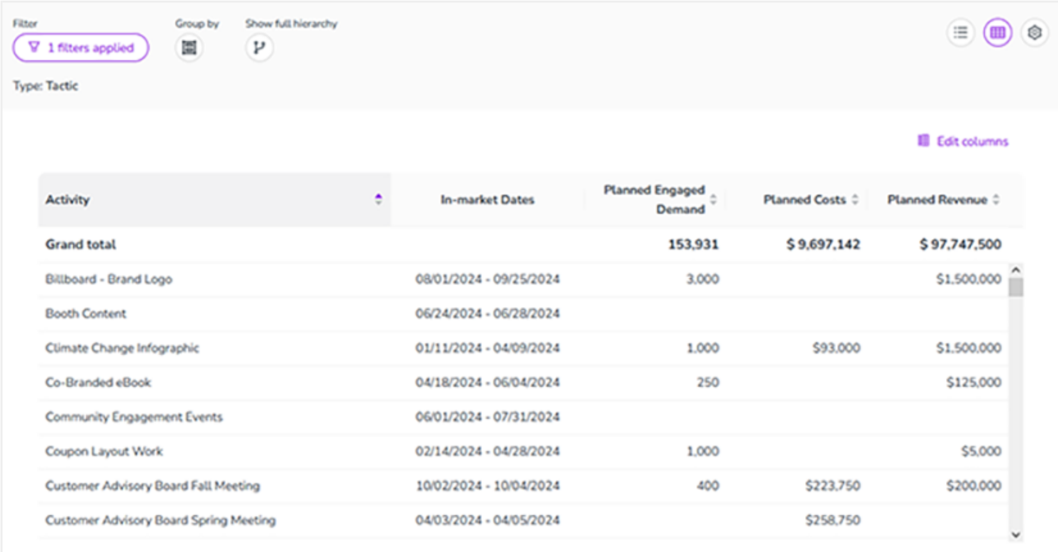
- *Editing the In-Market Period* on page 65



# 2.3 Summary View

The *Summary* view shows you the planned inquiries and planned revenue of activities:



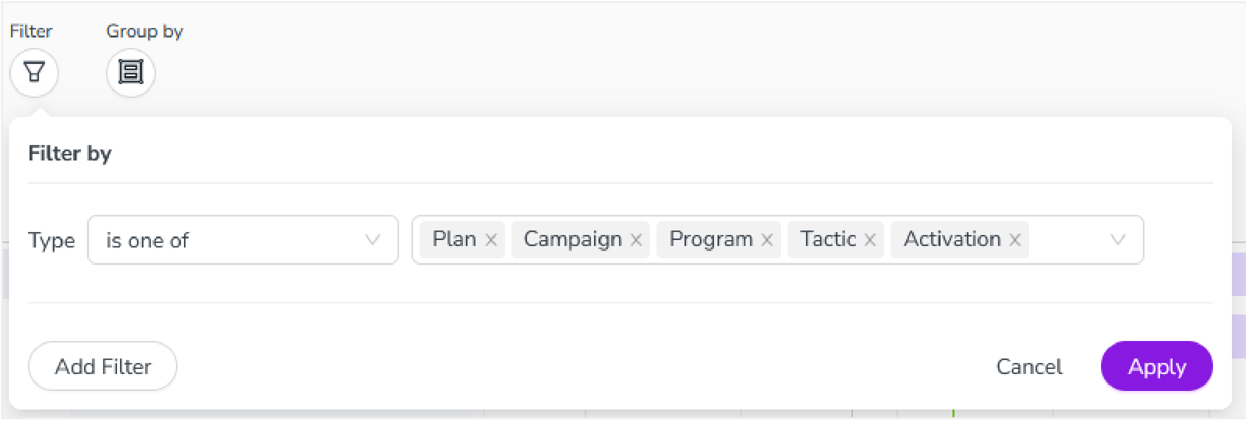

You access the *Summary* view by clicking button above *Timeline* view. Clicking opens *Timeline* view again.

## Related Actions

- *Comparing Activities* on page 94
- *Finetuning Estimated Costs* on page 66
- *Custom KPIs in Summary View* on page 99

## 2.4 Filtering and Grouping

Above the Activity hierarchy you can reach the *Filter* and *Group by* buttons. Use these buttons, for example, to reduce a large number of created activities to those you want to continue working on. Or, for example, group all activities your team is working on by channel (facebook, adwords, banners, linkedin).

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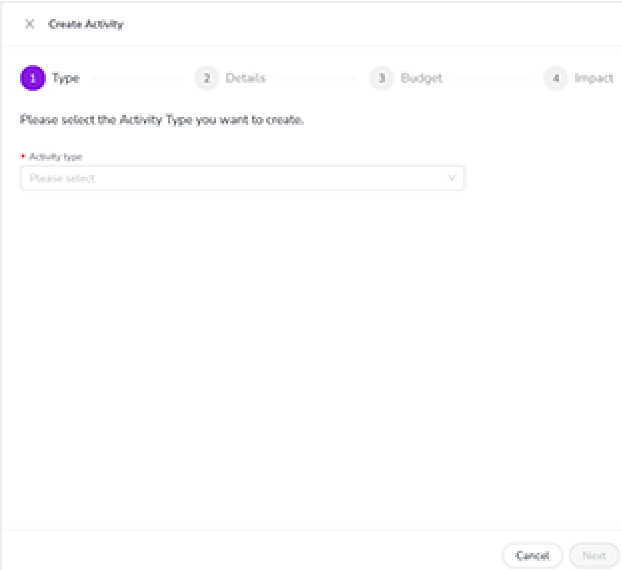
### Related Actions

- *Filtering and Grouping Activities* on page 70

# 2.5 Activity Wizard

Clicking *Create Activity* opens the *Activity Wizard*. In the *Activity Wizard*, you enter all the necessary data when you create an activity. The wizard is displayed on the right side of the *Activities*:




For more information see *Create a New Activity* on page 34.



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# 3

# Planning Activities

An activity is any targeted action or measure taken by your company to promote its products or services, attract customers, or increase sales. Activities can take various forms, such as advertising, public relations, sales promotion, direct marketing, online marketing, events or social media marketing. The aim of these activities is to attract the attention of the target group, arouse interest in the products or services offered, and ultimately promote sales.

Within Uptempo Platform, activities are structured in a hierarchy and represented with their in-market dates in the *Timeline View* on page 19:


How the hierarchy is structured is determined during implementation in cooperation with the marketing department, so that the structure meets the requirements of your company. In many cases the following, or a similar structure is used:

- Plan
  - Campaign
    - Program
      - Tactic

Contact your system administrator if you have any questions.

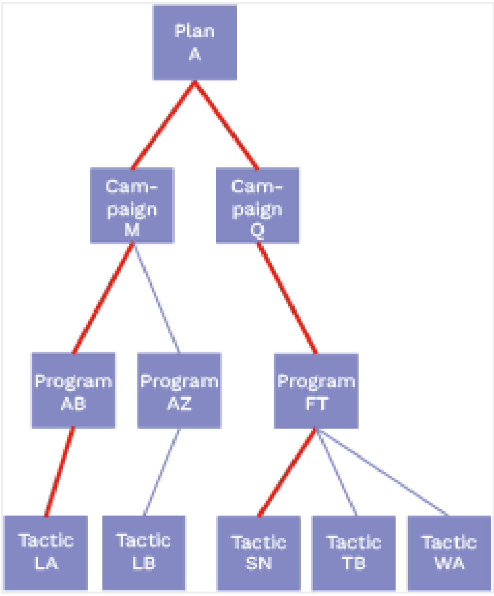
## What is a Path in a Hierarchy?

For easy understanding, we would like to explain the term *Path* and its meaning in the context of hierarchies.

A path in a hierarchy is the direct way from the root element to a child element at the lowest level. The following image shows several paths:

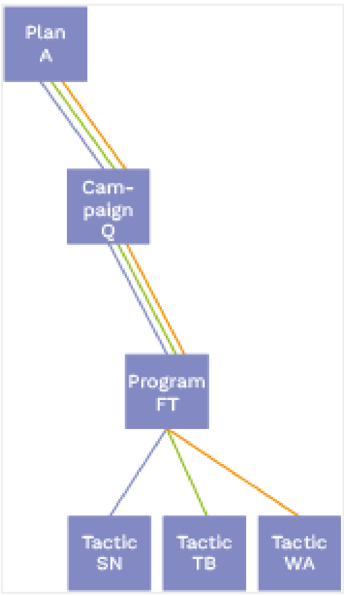




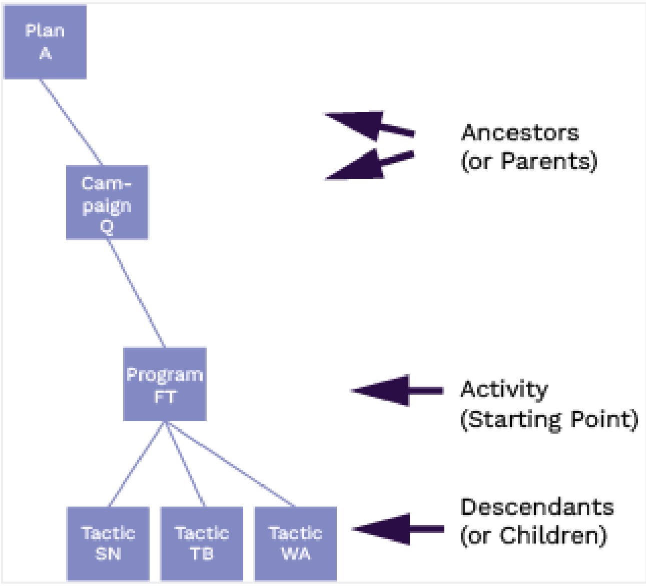

The image shows two paths along the red links, both starting from *Plan A*, one to *Tactic LA*, the second to *Tactic SN*. Of course, any other connection between *Plan A* and any other tactic is also a path.

Also note that paths share their ways down the hierarchy. The following graphic shows a part of the hierarchy with three paths:




The paths share the way via *Campaign Q* and Program FT. This is relevant for actions you perform on *Campaign Q* and *Program FT*, since these actions affect all three paths.

Within a hierarchy, a distinction is made between ancestors and descendants. It is important to define the starting point first, in this picture it is *Program FT*.




The upstream activities in the path are ancestors (*Plan A*, *Campaign Q*), the downstream activities are descendants (in preceding image the three tactics).
The term *Parent* may be used for the first ancestor, the first descendant is a child.

## Properties of an Activity

Each activity has the following properties:

- Name
- In-Market period with start and end date. The dates are not bound to a fiscal year.
- Activity type: Setting an Activity type defines the following:
    - Under which parent your activity can be created.
    - Which other attributes are displayed for the activity and which of them are required.
    - Whether workflows are associated with the activity, and if so, which ones.

  Note that the activity type cannot be changed after creation.



## Estimating Activity Costs

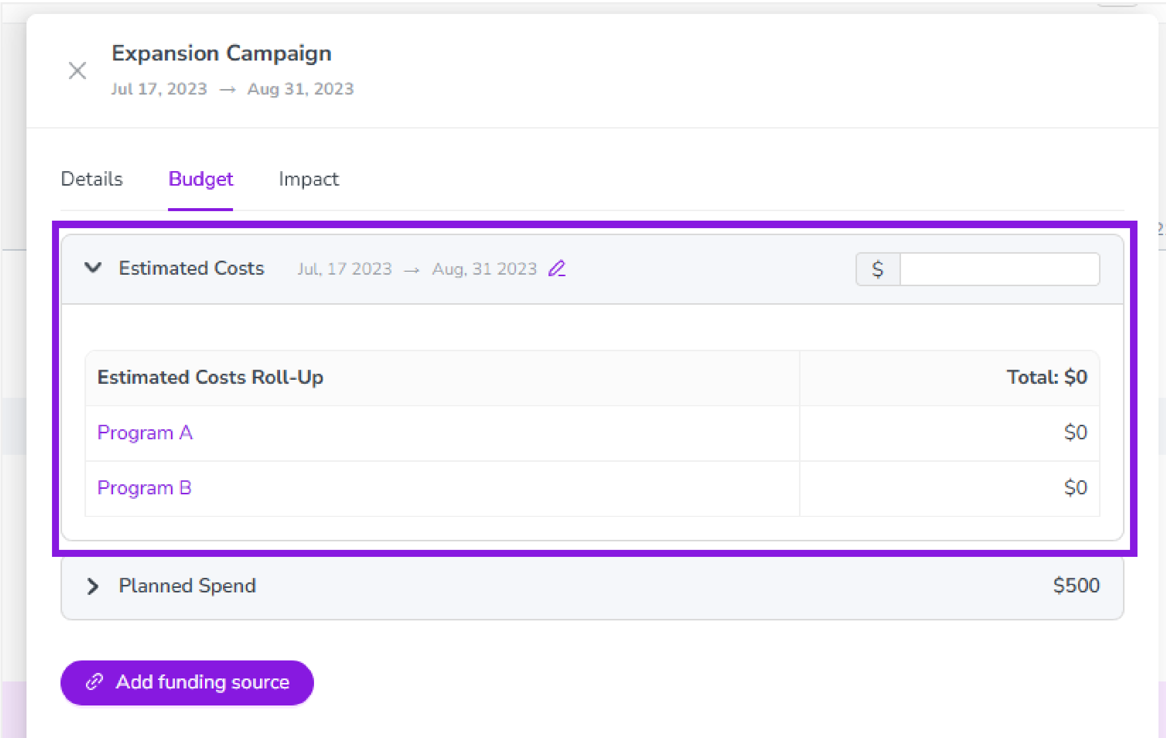
When you plan your marketing activities, the budgets for funding those activities may not yet be set. If you already have an estimate in mind for how much an activity will cost, you can use the *Estimated Costs* feature to enter the cost estimate directly in the details of that activity. This allows you to keep a record of your cost estimates in Uptempo, making it easy to reference them when the budget is finalized. Any *Estimated Costs* amounts you enter are only for your reference: they are not included in your financial planning under the *Budgets* or *Investments* sections, and the value is not evaluated by the *Analytics* functions.

To record a cost estimate for an activity, follow these steps:

1. In the activity hierarchy, click the activity to which you want to add a cost estimate.

   The activity's *Details* panel opens.

2. Click the *Budget* tab, then click the *Estimated Costs* section to expand it:



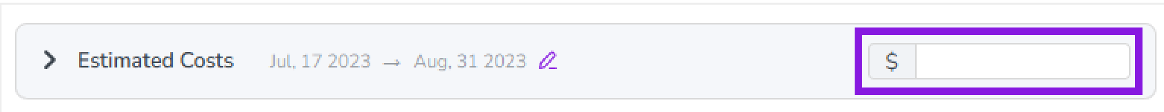
> **Note:**
>
> - If the activity you are viewing has activities in the hierarchy below it (child activities), these will be displayed in the expanded view. Any cost estimates set on those activities will also be displayed, along with a roll-up total that you can use to inform the total estimated cost for the parent activity you're viewing.
> - You can click on the name of any child activity shown to go directly to the *Budget* tab for that activity.
> - The *Estimated Costs* section is not expandable if you're viewing an activity that has no child activities, and you're using the total amount input format (instead of quarterly amounts).

3. Optional: All cost estimates have a default date range (typically, the in-market dates for the activity). To edit the date range, click the *Edit the date range* button in the *Estimated Costs* section, then use the date picker to select the start and end dates.
4. Enter the cost estimate amount in the *Estimated Costs* section. You will see either a single input field, or multiple input fields, depending on whether your Uptempo instance is configured for total or quarterly estimated cost amounts:

#### Total Amounts (Single Input Field)

If your Uptempo instance is set up to use the *Total Estimated Costs* format, you specify a single amount for the full date range.

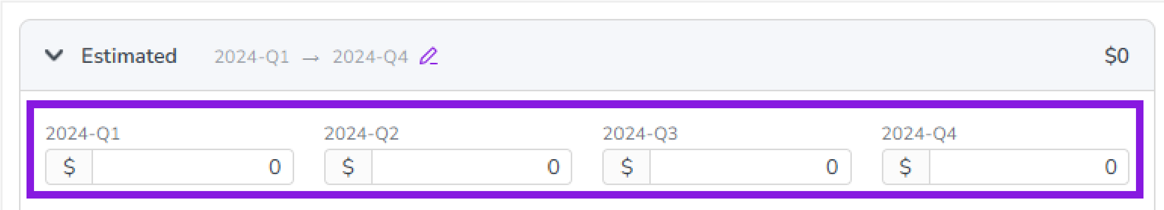
Enter the amount into the single total input field:



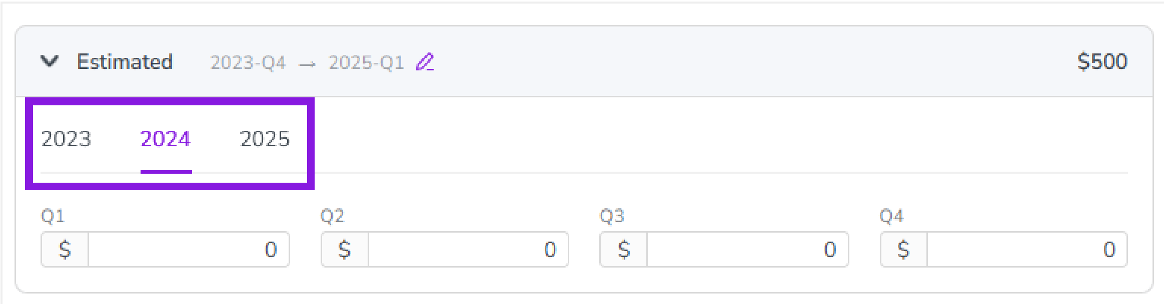

#### Quarterly Amounts (Multiple Input Fields)

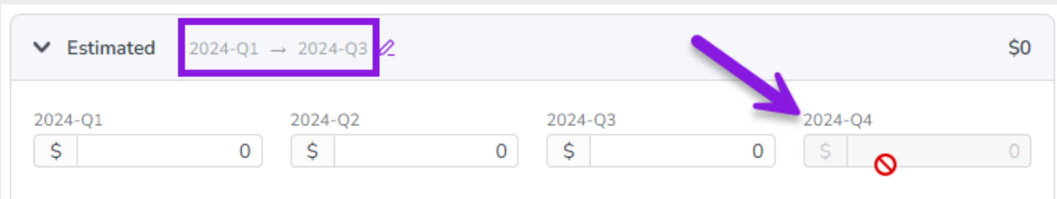
If your Uptempo instance is set up to use the *Quarterly Estimated Costs* format, you specify separate amounts for each quarter in the date range.

Enter the amounts into each of the quarterly input fields:




If the date range covers more than one year, each of the years in the date range will also be shown. Click a year to switch to the input fields for that year.




> **Note:**
>
> The system will always display the input fields for all four quarters. If any quarter is outside the specified date range, the corresponding input field will be disabled:
>
> 
> 

All cost estimate amounts you enter are saved automatically.

5. You have successfully recorded a cost estimate for an activity.

To better compare and finetune estimated costs within the hierarchy, you can also use the *Summary View* on page 21. See Finetuning Estimated Costs for information of the different use cases.

## Funding the Activity

When planning, you need to consider how you will finance your activities. To get an overview of the financial scope in your activity planning, you can link the activity to one or more categories, sub-categories, line items or placeholders in the hierarchy of the *Investment* tab.
Note that linking activity and investment is subject to certain rules, for more information see *Rules for*

*Linking Investments* on page 46.

If the link is successful, the sum of the monthly plan columns will be displayed as the total planned investments amount. If you link multiple planned investments, you will also get the total amount of all links.

> Note
>
> You cannot change the planned investment data in the *Activity Details*. To manage the planned investments data, click > *Investments* in the side navigation.

## How Should My Activity Perform?

When planning marketing activities, you may have tangible results in mind. However, it is not easy to demonstrate the connection between these expected results and potential revenue generation and, therefore challenging to justify the required investment. Impact modeling allows you to project expected revenue from marketing activities based on your demand-generation goals. This process is essential in maturing marketing teams from being spend-oriented to result-driven.

To find out which revenue your marketing activities will generate, you can provide performance plan data as a first guide, for example, number of inquiries that should be generated by an activity. Your system administrator also maintains conversion rates, velocity and average deal sizes for your company's sales & marketing funnel. Based on this information, Uptempo calculates when the activity should generate what revenue.

For more information see *Planned Impact* on page 57

## Workflows

In your company, activities can be linked to defined processes: the planning of an activity, for example a campaign, may have to go through an approval process. Or with the creation of a tactic, the creation of an asset is directly necessary, for example a digital ad for different channels. The creation goes through a defined process and can therefore be mapped in a workflow.

Your system administrator also manages the connection to workflow types for the activity types. A linked workflow can be started for each activity. The start of a workflow is either triggered automatically when the activity is created or manually by you. Which variant is chosen depends on the settings that your system administrator manages.

When a workflow is started for an activity, the activity and the workflow exchange data: Data of the activity can be displayed in the workflow and vice versa. Which data this is, is determined accordingly for the respective use case during setup. If you have any questions, please contact your system administrator.

For more information see *Synchronizing Data* on page 76.

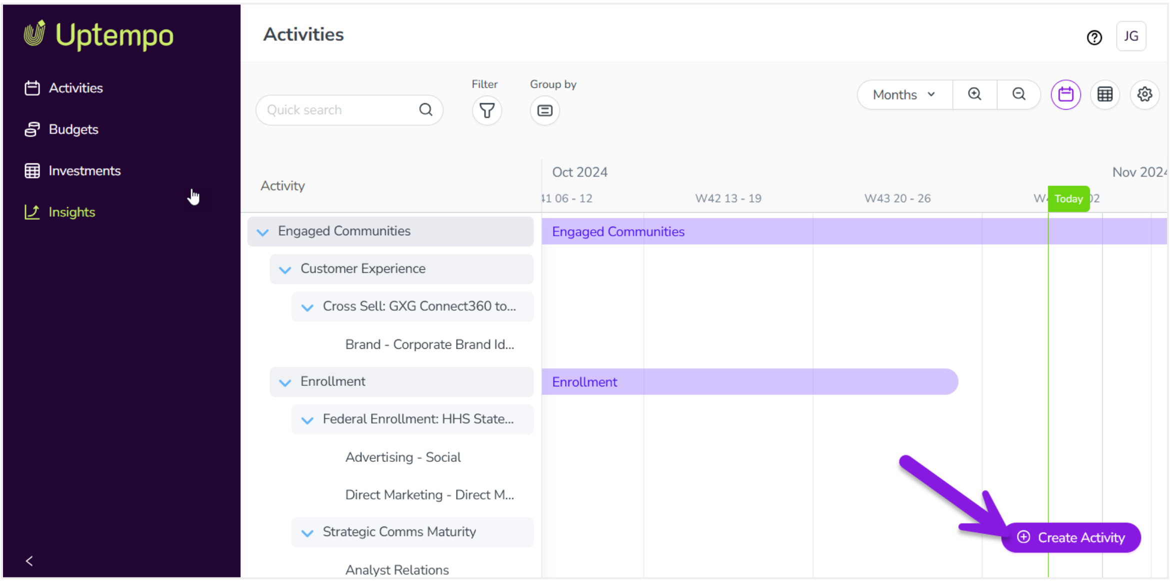


## 3.1 Create a New Activity

To create a new activity, follow these steps:

1. In Uptempo, click *Activities* in the navigation sidebar.
2. In the Activities section, click *Create Activity.* The button is available on both the *Timeline* and *Summary* views:




The *Create Activity* panel opens with the *Type* page displayed.

> **Note:**
>
> You can also create a new activity directly under an existing activity, which will automatically set that activity as the new activity's parent. For details, see *Create New Activities Directly Under Existing Activities* on page 41.

3. On the *Type* page:
   a. Use the *Activity type* list to select the type of activity you want to create from the available options. You can also type a keyword into the field to search for matching options.
   b. Use the *Parent* list to select the activity under which you want to create this new activity in the hierarchy. You can also type a keyword into the field to search for matching options.

Note: Depending on the rules set up in your Uptempo environment, selecting a parent activity may be optional for some activity types.

c. Click *Next*.

The *Details* page is displayed.

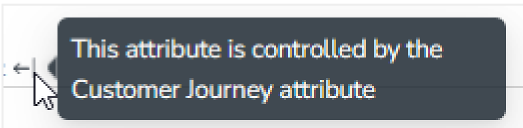
4. On the *Details* page:

a. Enter a name for your new activity into the *Name* field.

b. Optional: To set the date range when this activity will be in-market, use the *In-market Dates* fields to choose a start and end date.

c. Depending on the activity type you selected, additional attribute fields may be displayed. Complete any other attributes as needed: if an attribute is marked with an asterisk (*), it is required and you must select or enter a value before you can proceed.

Note: If you see the icons  and  next to an attribute name, then these attributes are part of a dependency. Hover over the icon to see information about which other attribute is part of the dependency:




The options that you can select in the dependent attribute are controlled by the value of the controlling attribute. If no option is selected for the controlling attribute, then no options are valid for the dependent attribute. If the controlling attribute is a multi-select field, the available dependent options will be the combination of the valid options for each selected controlling option.

d. Click *Next*.

The *Budget* page is displayed.

5. On the *Budget* page:

a. Optional: To enter a cost estimate for this activity, use the Estimated Costs field. For instructions, see Estimating Activity Costs.

b. Optional: To connect this activity to an investment, click *Add funding source*. For instructions, see *Connecting Activities to Financial Items* on the next page.

c. Click *Next*.

The *Impact* page is displayed.



> Note:
>
> The specification of attributes can have an influence on the calculation of the performance plan data. We therefore recommend that you first edit all attributes of the activity on the *Details* tab. Only then calculate the performance plan data. For more details see *Planned Impact* on page 57.

6. On the *Impact* page:

   a. Optional: If the parent activity you selected on the *Type* page allows child activites with performance data (or if the activity you're creating does not have a parent), you can configure the performance data here. For instructions, see *Configuring Planned Impact* on page 39.

   b. If no additional steps are displayed after the *Impact* step, skip to step 8.

   c. If a *Workflow* step is available, click *Next*.

   The *Workflow* step is displayed.

7. On the Workflow step:

   a. Optional: If the activity is linked with a workflow, decide when the workflow will be started:

      - If the workflow is to be started with the creation of the activity, select the *Automatically create the workflow* checkbox.
      - If the workflow is to be started at a later time, clear the *Automatically create the workflow* checkbox.

8. Click *Submit* to finish creating the activity.

   The *Create Activity* panel closes, and the new activity's *Details* panel opens automatically.

You have successfully created the activity. You can now make changes to the new activity in the *Details* panel, or close the panel if you want to do something else.

## Connecting Activities to Financial Items

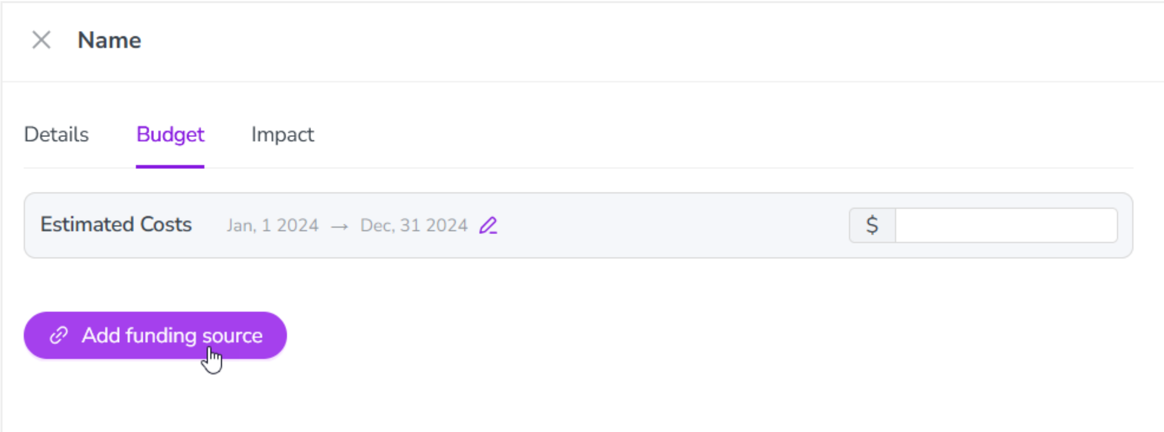
You can connect activities at various levels (plan, campaign, program, etc.) to one or multiple investments in *Uptempo Spend*. You can do this either as part of creating an activity, or on an existing activity.

To connect activities to investments, follow these steps:



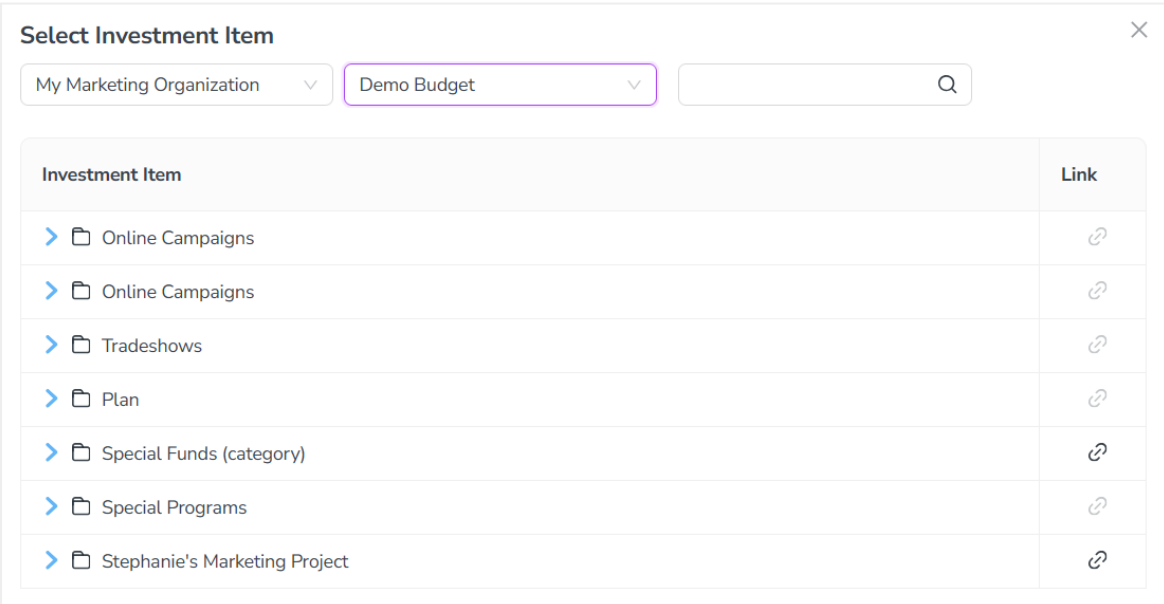
1. On the activity where you want to connect investments, open the *Budget* page:
    a. While creating a new activity, go to the *Budget* page in the *Create Activity* panel.
    b. For an existing activity, go to the *Activities* section and click on the activity in the hierarchy to open its *Details* panel, then click the *Budget* tab.
2. Click *Add Funding Source*.




The *Select Investment Item* dialog is displayed.

3. Select the budget you want to use from the *Select Budget* lists. You can also use the search box to search for the budget you want.

The *Investment Item* list appears:

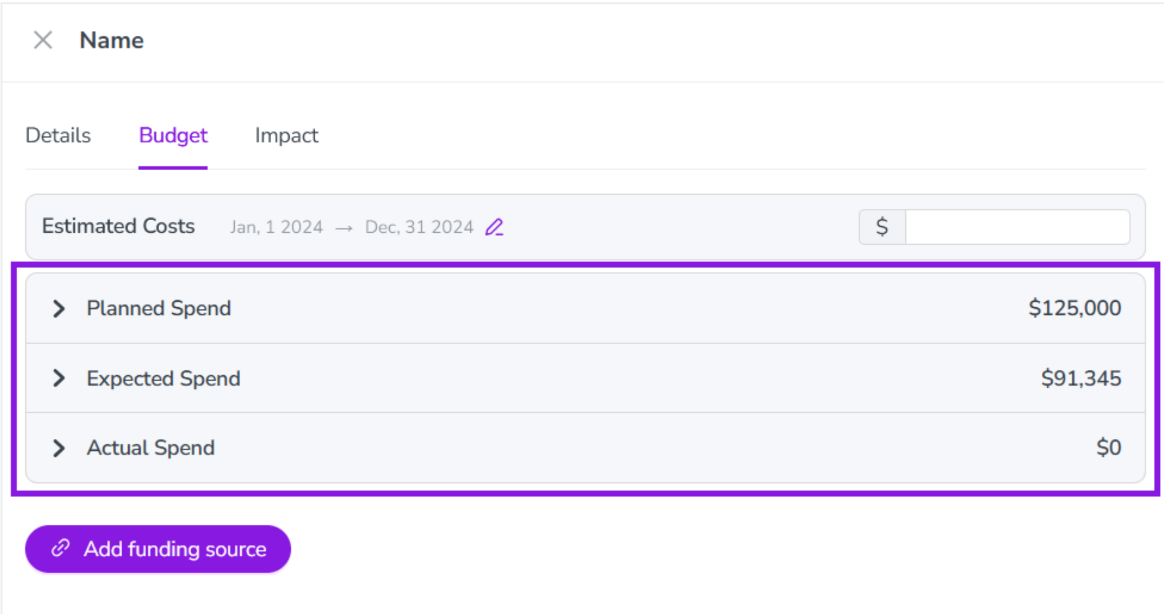


4. In the *Investment Item* list, find the investment you want to connect. Click an investment item's *Link* button to connect it to the activity.

   Note:

   The *Link* button may be unavailable for some investment items to indicate that they can't be connected to the activity. Whether an investment can be connected to a particular activity is controlled by the rules that have been set up in your Uptempo environment.

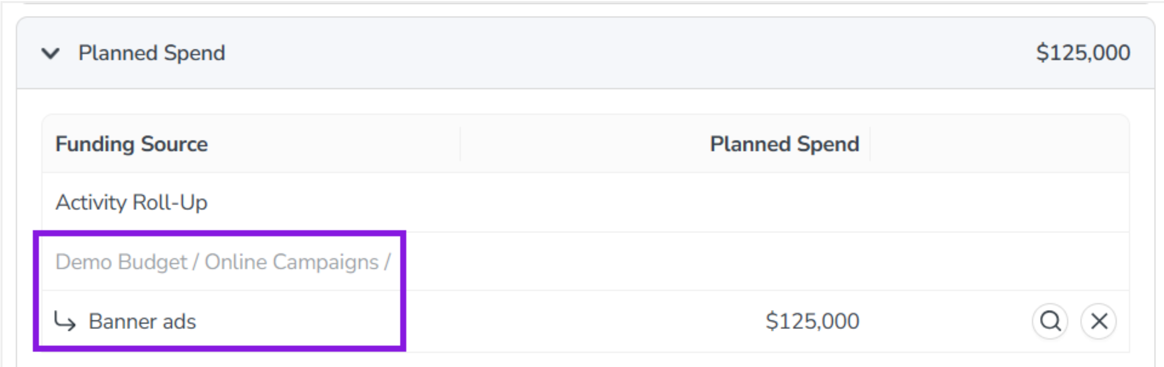
   The *Select Investment Item* dialog closes. You are returned to the activity's *Budget* page, which now contains additional subsections that display spend data for the connected investment:




   Note:

   The subsections that are displayed correspond to the spend data categories that are configured in *Uptempo Spend*: by default, these are *Planned*, *Expected*, *Committed*, and *Actual*. In your environment, some of these subsections may not be visible, or they may have different names.

5. Click on a subsection to expand it and see the details of the connected investment:




- To disconnect the investment from the activity, click *Disconnect*.
- To view the details of the investment in *Uptempo Spend*, click *Search*.

6. Optional: To connect additional investments to the activity, click *Add funding source* again and repeat steps 3 and 4.

   Any further investments you connect are also displayed on the activity's *Budget* page.

7. Finish up:
   - If you're creating a new activity, finish creating the activity and click *Submit* to apply your changes.
   - If you're editing an existing activity, close the activity's *Details* tab to apply your changes.

The selected investments are now connected to the activity, and will be visible in spend reports and budgeting overviews.

## Configuring Planned Impact

If the activity is a point where plan performance data is to be captured:

a. Add the number of requests the activity is expected to generate.

   Based on the funnel settings, the planned revenue projection is calculated.

b. In case you want to edit the distribution:

   i. Select *Monthly* or *Quarterly* (distribution) in the *Distribute Results* dropdown.

      The months or quarters with the planned inquiries are displayed.

ii. Click *Edit distribution*.

The fields per month/quarter are editable.

iii. Edit the number of inquiries per time range as desired.

Note: Editing the month/quarter fields will override the number in the *Planned Inquiries* field.

## Related tasks

- *Create New Activities Directly Under Existing Activities* on the facing page



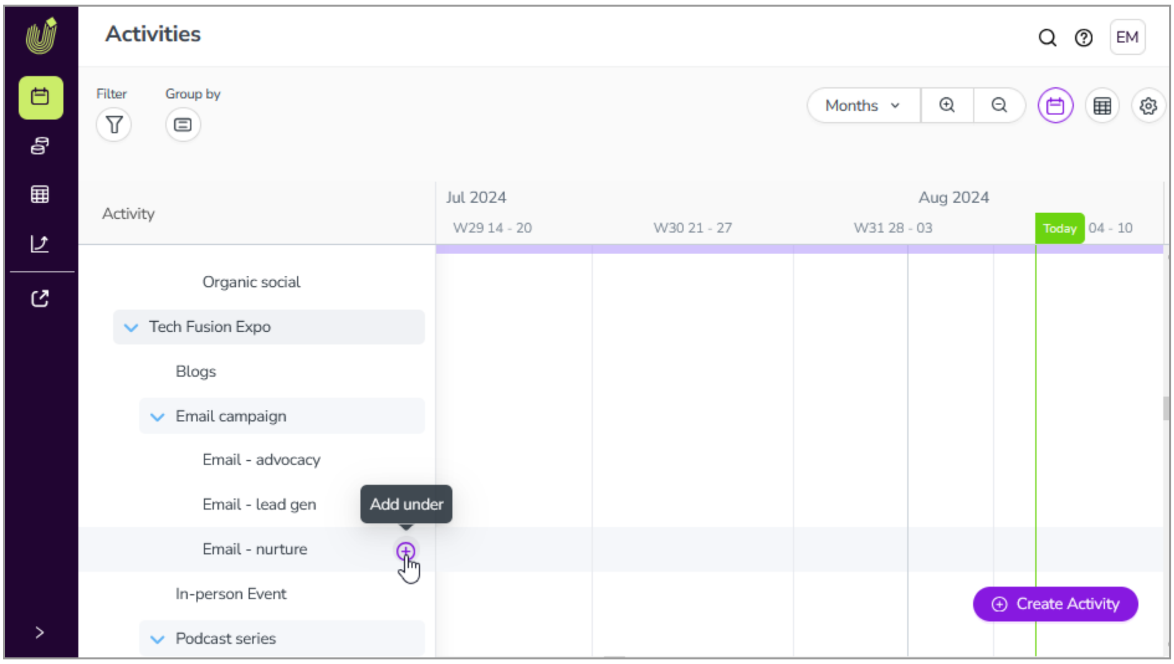
# 3.2 Create New Activities Directly Under Existing Activities

In the *Activities* section, creating a new activity in the activity hierarchy is now easier and faster: with the *Add under* feature, you can create a new activity directly under any existing activity in *Timeline* and *Summary* view. To save time and effort, the setup process is streamlined when you create a new activity with this method:

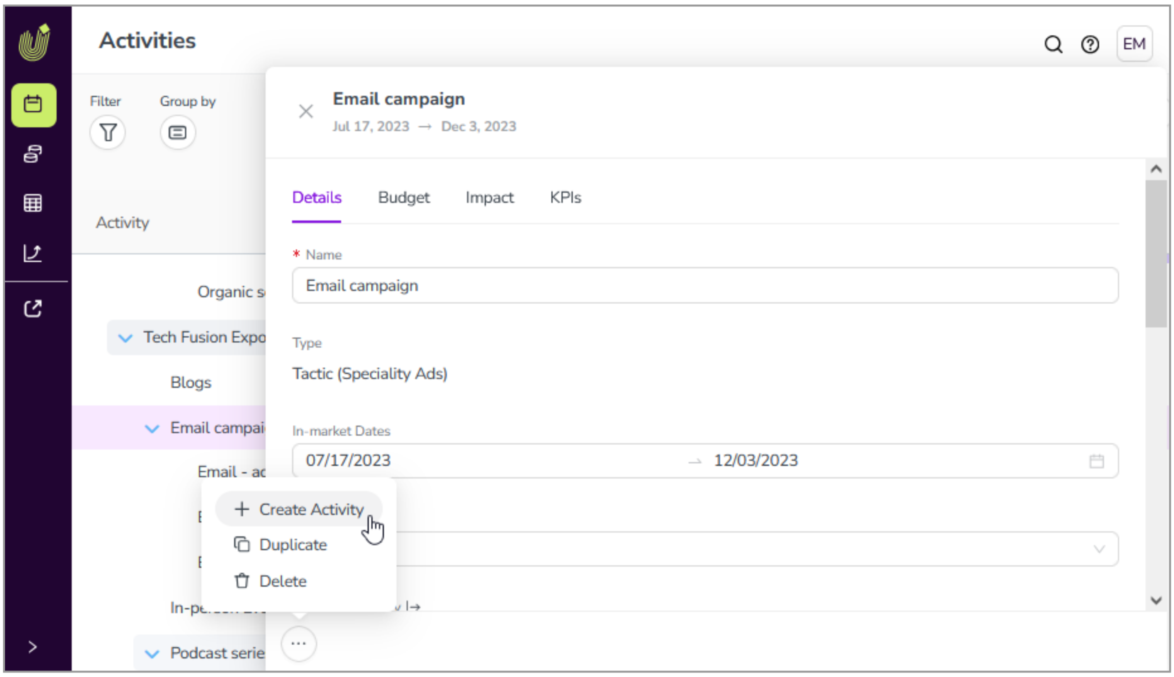
- The *Parent* field is automatically set to the appropriate parent activity (i.e. the activity under which you created the activity), so you don't need to set it manually.
- The *Activity type* field is filtered to only show valid options for the selected parent activity, making it easier to choose the correct activity type.

The *Add under* feature is available in the following places:

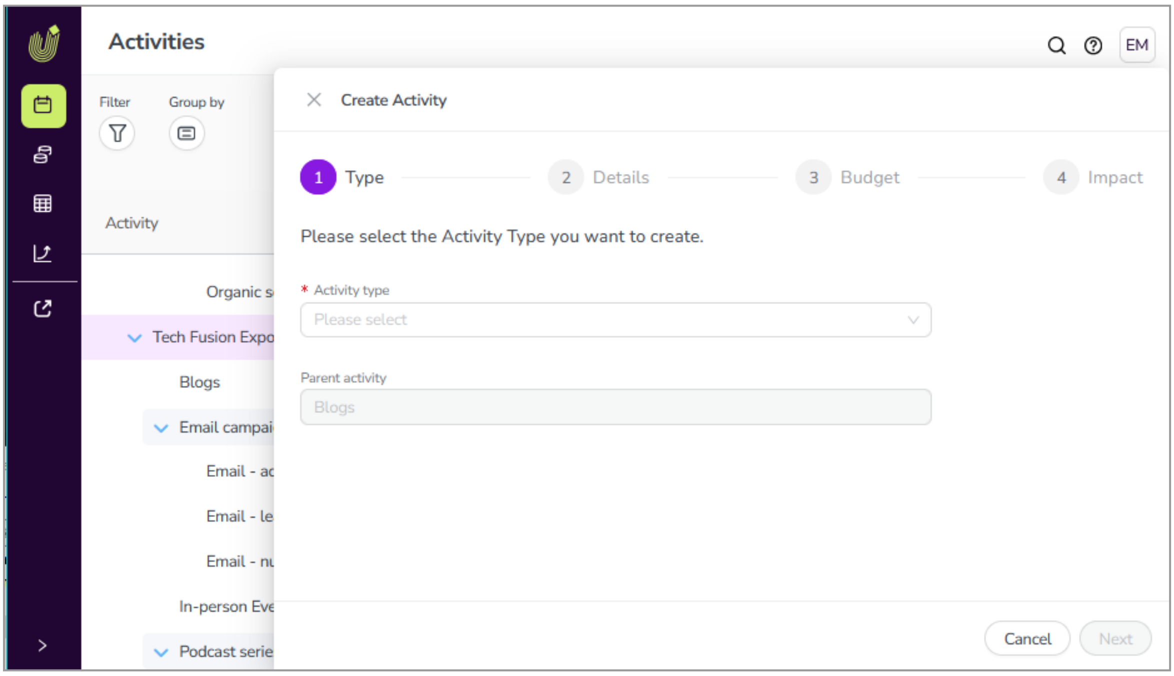
- When you are in the *Timeline* and *Summary* views, hover on any existing activity and click the ⊕ button positioned next to the activity name:




- While viewing the *Details* panel of any existing activity, hover on the ... *Actions* menu and click + *Add under*:




- In both cases, the *Create Activity* wizard will open (with the relevant parent activity preselected), and you can configure your new activity as you would usually:




You have created a new activity directly under an existing activity in the activity hierarchy.

## 3.3 Quick Search for Activities

To quickly locate activities in the timeline or summary view, this release includes a quick search. We are introducing our new Planning hierarchy search feature - designed to help you quickly locate activities in your project plans. It is a challenging and time-consuming process to identify specific activities within complex project hierarchies just by clicking through the elements. The quick search feature solves this problem. We've added a quick search bar next to the *Filters*, *Group* and *Show full hierarchy* options. It works with your current filters for contextual searches. You can search:

- an activity name
- an activity ID

The result is a list of hits. When you search for an activity by name, you will see the hits highlighted. This includes the position in the hierarchy for the hits by displaying the higher-level activities. Expand by clicking > to view descendant activities.

## 3.4 Duplicating Activity or Branch

You have the option of copying an activity and, if existing, subordinate activities. By duplicating complete branches, this feature minimizes your effort when building your hierarchy.

When copying, activities of the same type are created and the data on the *Details* tab is copied. The names of the new activities will correspond to the original activities, but with the addition of *(copy)*. The linkage to investments and the planned and actual impact must be entered manually for the new activities. In the hierarchy, the new activities are created in the same branch as the original activities.

> Note
>
> You can duplicate up to 100 activities at a time.

### How to Duplicate

1. Click the name of the top activity you want to copy.

   The *Details* panel is opened.

2. At the bottom left of the *Details* panel, click > ... > *Duplicate*.

The activity and, if existing, subordinate activities are duplicated. The copy is added to the same hierarchy branch. The names of the new activities are *[Name of original activity] (copy)*.

It may also be necessary to move the duplicated activity or branch to a new parent activity. For more information see *Moving Activity or Branch* on the facing page.

> Note
>
> Moving activities also deletes links to investments. Therefore you must move the activity or branch first before you create the link to investments again. This saves you extra work.



# 3.5 Moving Activity or Branch

You can move an existing activity and, if necessary, the underlying branches in the hierarchy. The condition here is that the activity can only be inserted under matching parent activities. Moving triggers the following:

- Any links to investments that have already been created are removed; these must be created again under the new parent activity.
- Inherited attributes are adjusted according to the new parent activity.
- The projections of the Impact Modeler are recalculated.

## How to Move an Activity or Branch

1. Open the *Details* panel of the top activity you want to move and go to the *Details* tab.
2. In the *Parent* field, select the new parent activity. In case you see a long list, search the list by typing the name of the new parent.
3. Click *Save*.

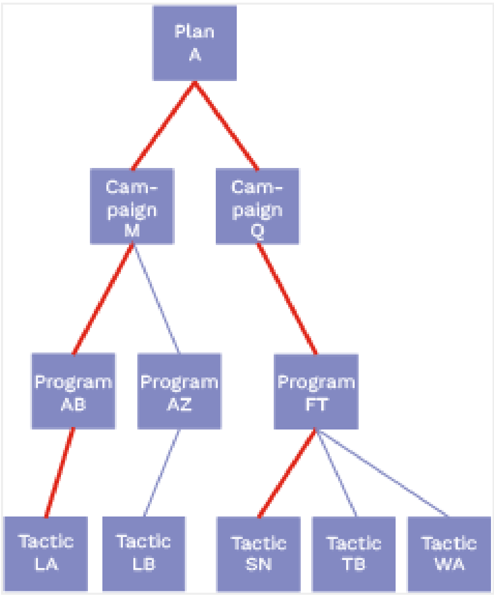
You have moved the activity and all activities below it within the hierarchy to a new parent.

## 3.6 Rules for Linking Investments

This chapter explains in detail according to which rules activities may be linked to items in the investment plans. For easy understanding, we would like to start by explaining the term *Path* and its meaning in the context of hierarchies.

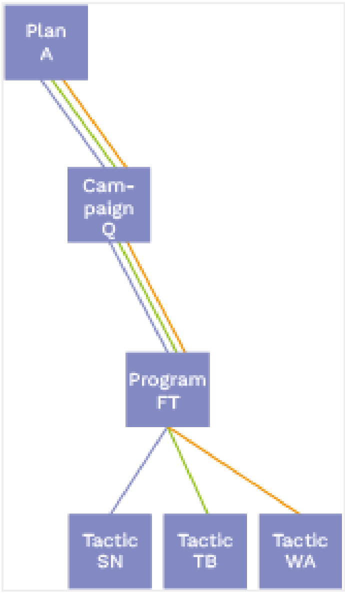
### What is a Path in a Hierarchy?

A path in a hierarchy is the direct way from the root element to a child element at the lowest level. The following image shows several paths:



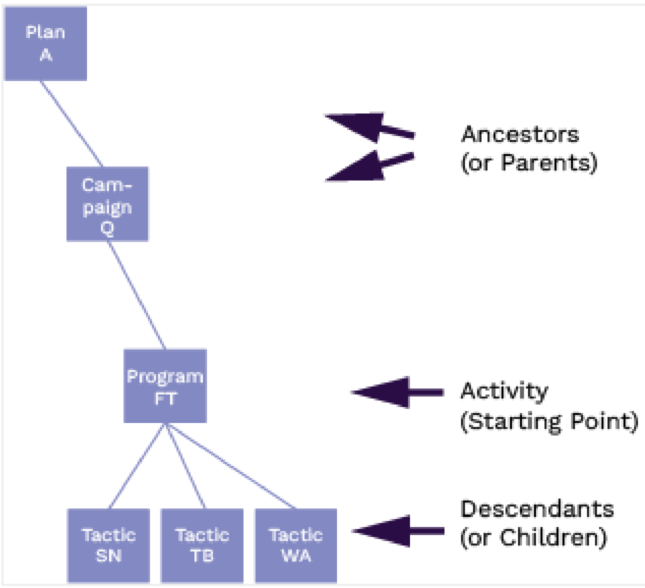

The image shows two paths along the red links, both starting from *Plan A*, one to *Tactic LA*, the second to *Tactic SN*. Of course, any other connection between *Plan A* and any other tactic is also a path.

Also note that paths share their ways down the hierarchy. The following graphic shows a part of the hierarchy with three paths:



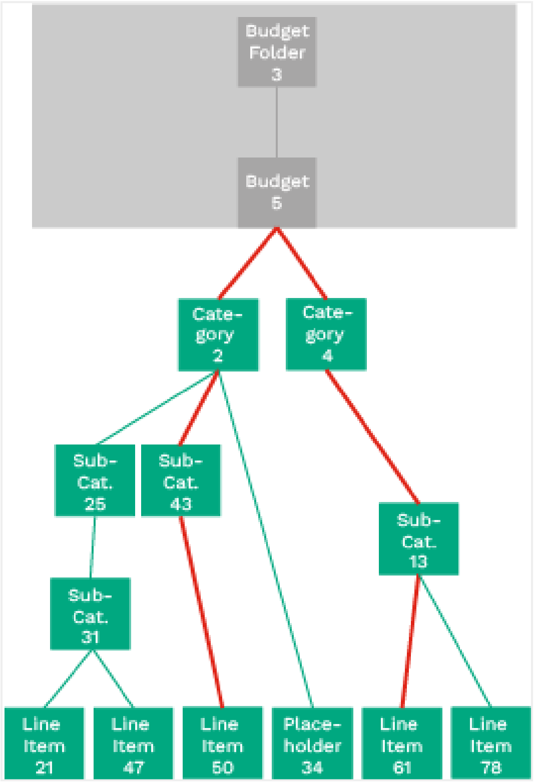

The paths share the way via *Campaign Q* and Program FT. This is relevant for actions you perform on *Campaign Q* and *Program FT*, since these actions affect all three paths.

Within a hierarchy, a distinction is made between ancestors and descendants. It is important to define the starting point first, in this picture it is *Program FT*.




The upstream activities in the path are ancestors (*Plan A*, *Campaign Q*), the downstream activities are descendants (in preceding image the three tactics).
The term *Parent* may be used for the first ancestor, the first descendant is a child.

Note that it is not possible to link to a budget element and that is why this area is shown in gray in the following image. The paths start at *Budget 5* and then go down via the categories, sub-categories to the line items and placeholders.

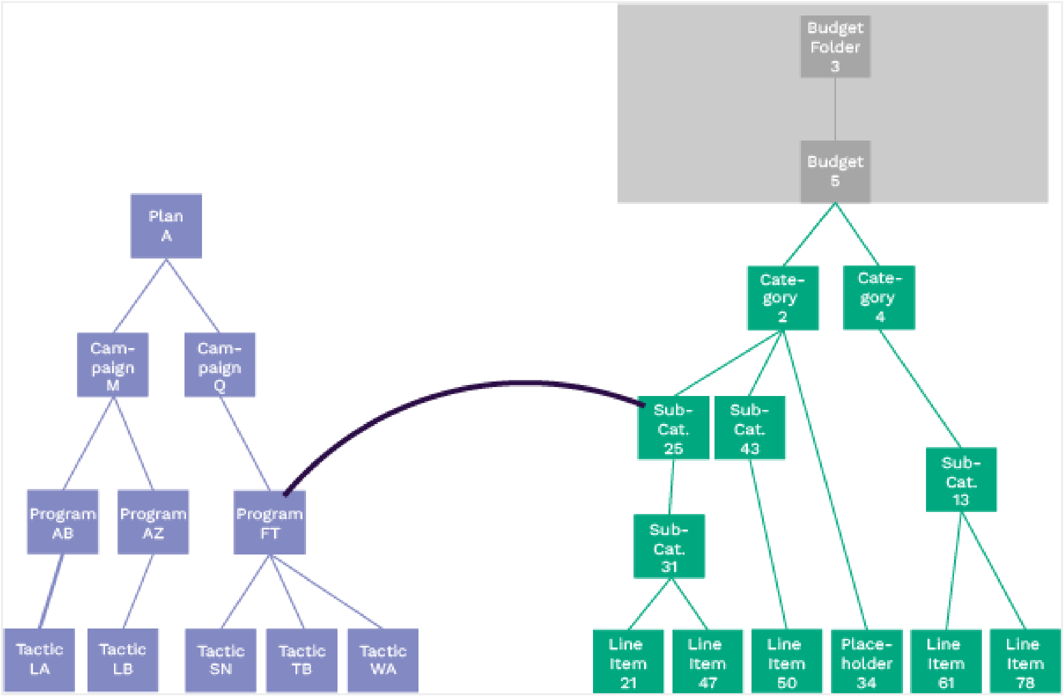



The following rules apply to linking of investments:

## Rule 1: An Investment Can Only Be Linked Once.

A financial item in the investment hierarchy can only be linked to one activity in the activity hierarchy. See the example in the following image: *Sub-Category 25* is linked to *Program FT* and therefore cannot be linked to any other activity.

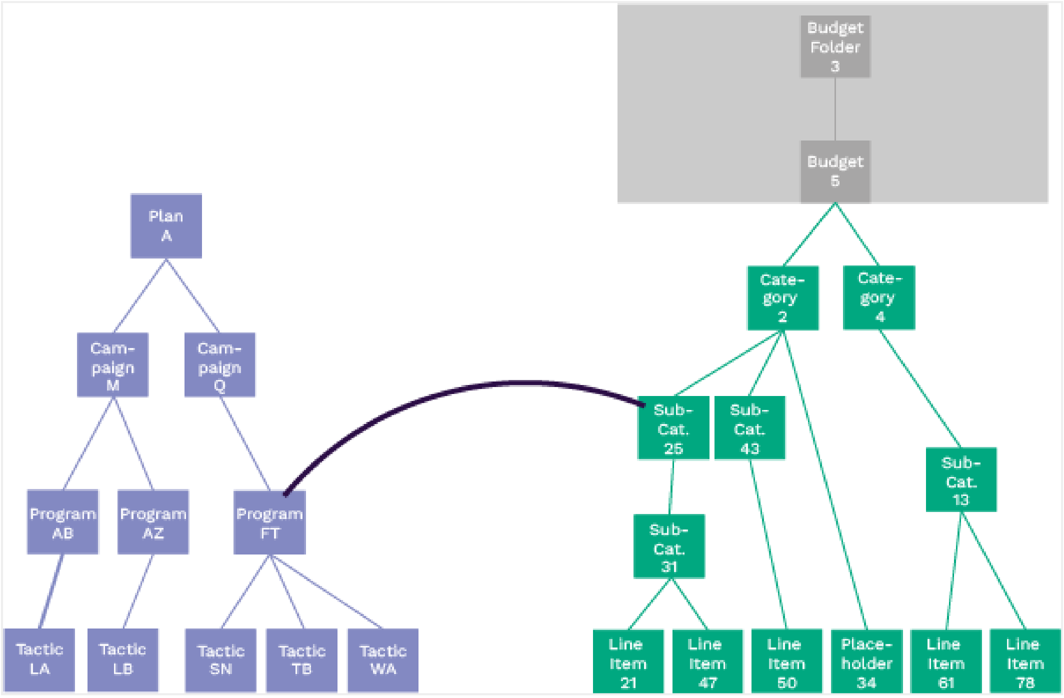

 



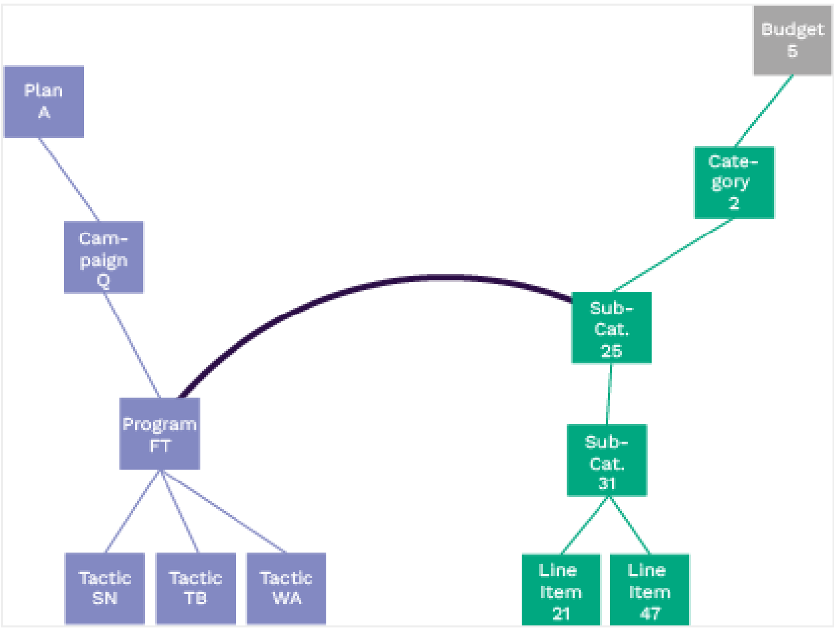

Conversely, an activity can be linked to multiple investments, even in multiple investment plans.

## Rule 2: An Activity Can Only Be Linked Once Within a Path in the Investments Hierarchy.

The following image shows a link from the *Program FT* activity to *Sub-Category 25* in the investment hierarchy.

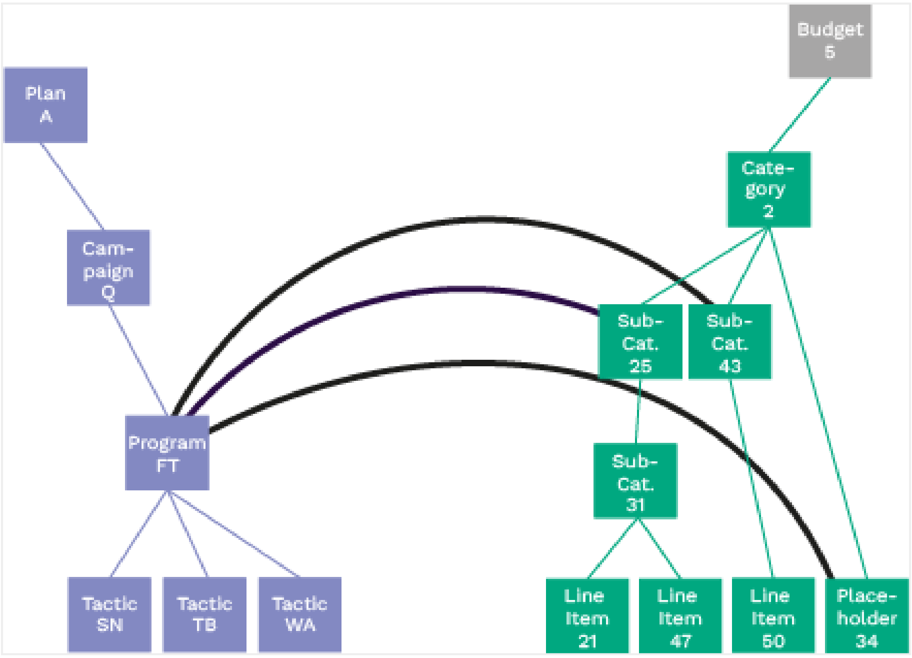



As a result, the following paths are linked in the hierarchies:



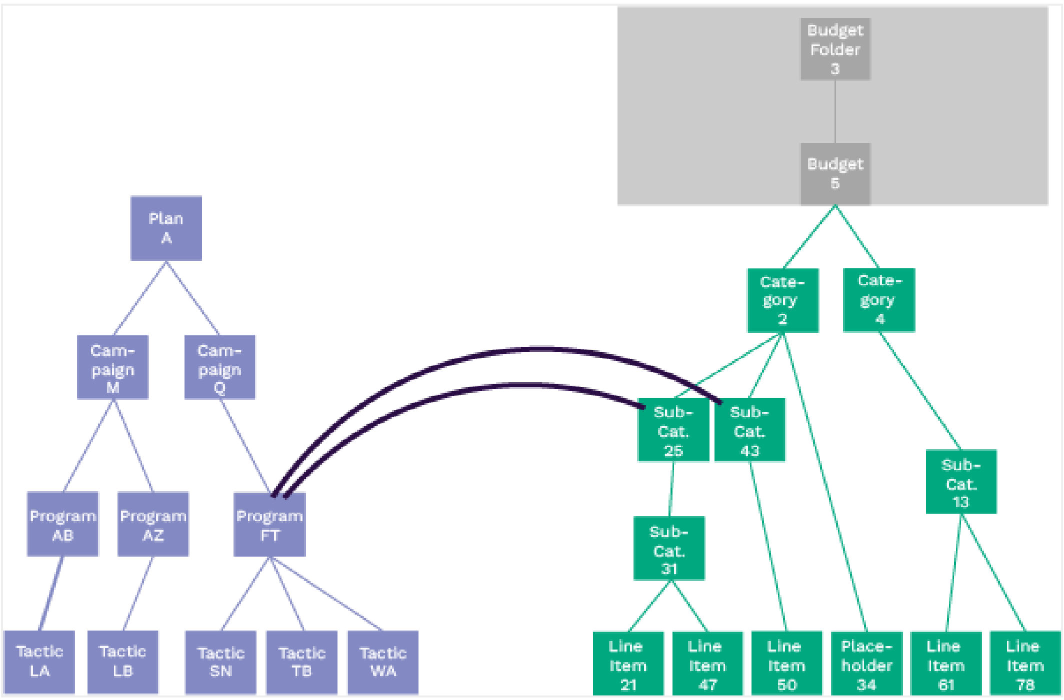

*Program FT* cannot be linked a second time within this path in the investment hierarchy.

However, it is possible to initially link *Program FT* to several paths:

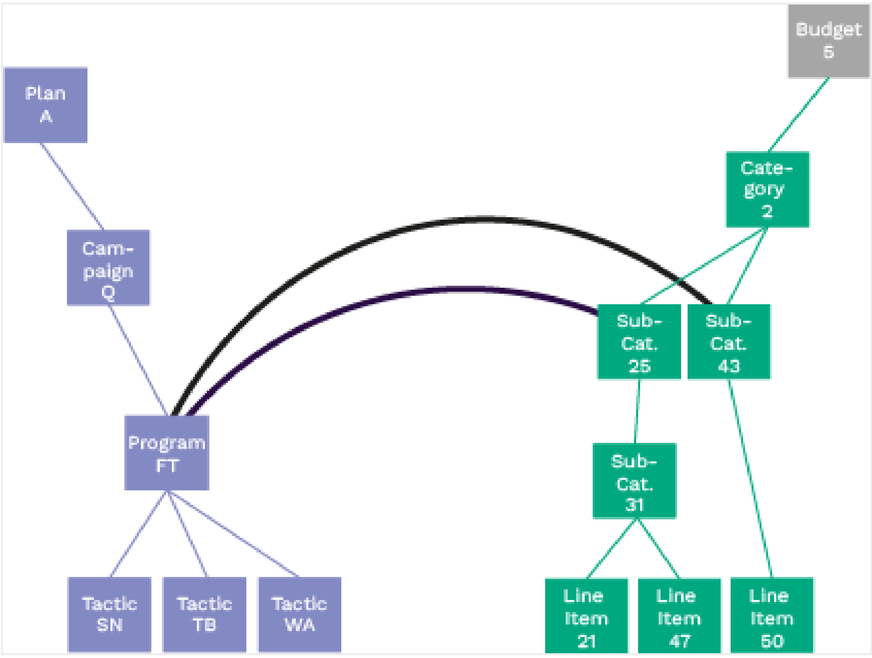



## Rule 3: Within Linked Paths Only Ancestors to Ancestors and Descendant to Descendants Can Be Linked.

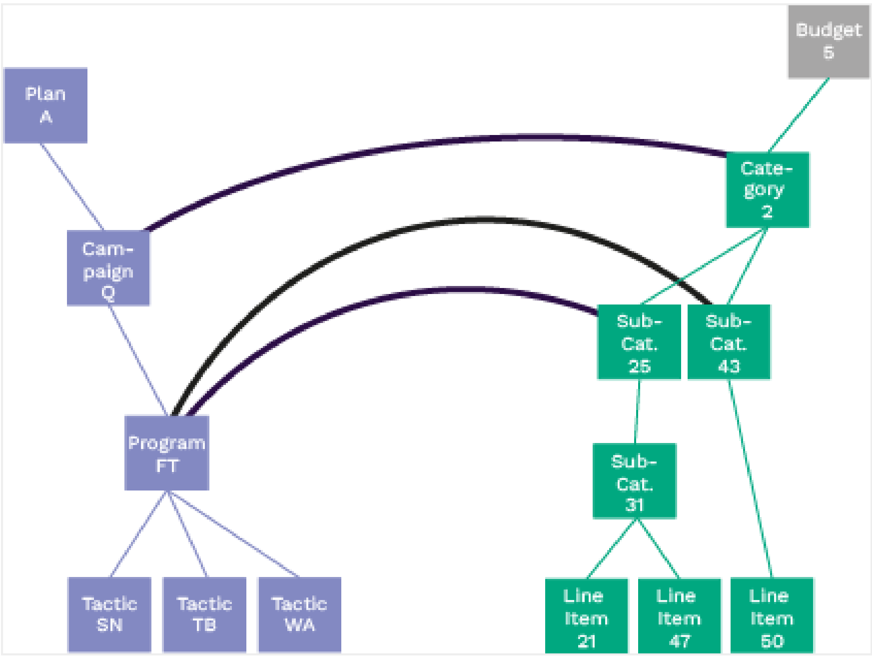
Let us explain this rule starting from the following picture. *Program FT* is linked to *Sub-Category 25* and *Sub-Category 43*.



As a result, the following paths are linked in the hierarchies:




Due to the already existing links of *Program FT*, *Campaign Q* can only be linked to ancestors of *Sub-Category 25* and *Sub-Category 43* in the investment hierarchy. In the picture this is *Category 2*:





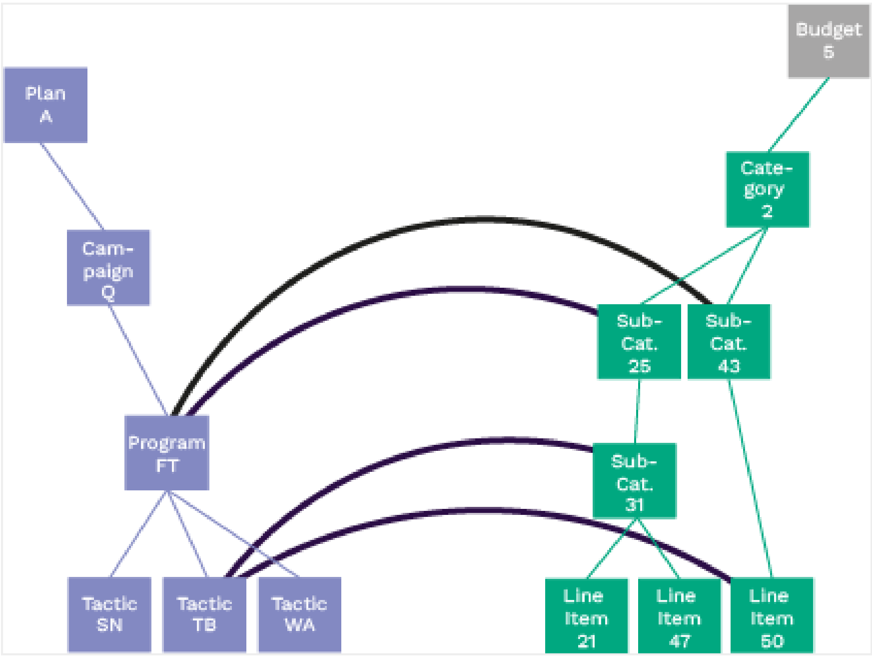

 

Logically, linking *Campaign Q* to descendants of *Sub-Category 25* and *Sub-Category 43* is not possible.

And descendants can only be linked to descendants: Therefore *Tactic TB* can only be linked to descendants of *Sub-Category 25* and *Sub-Category 43* with consideration of *Rule 2*:

- *Sub-Category 31*
- *Line Item 21*
- *Line Item 47*
- *Line Item 50*

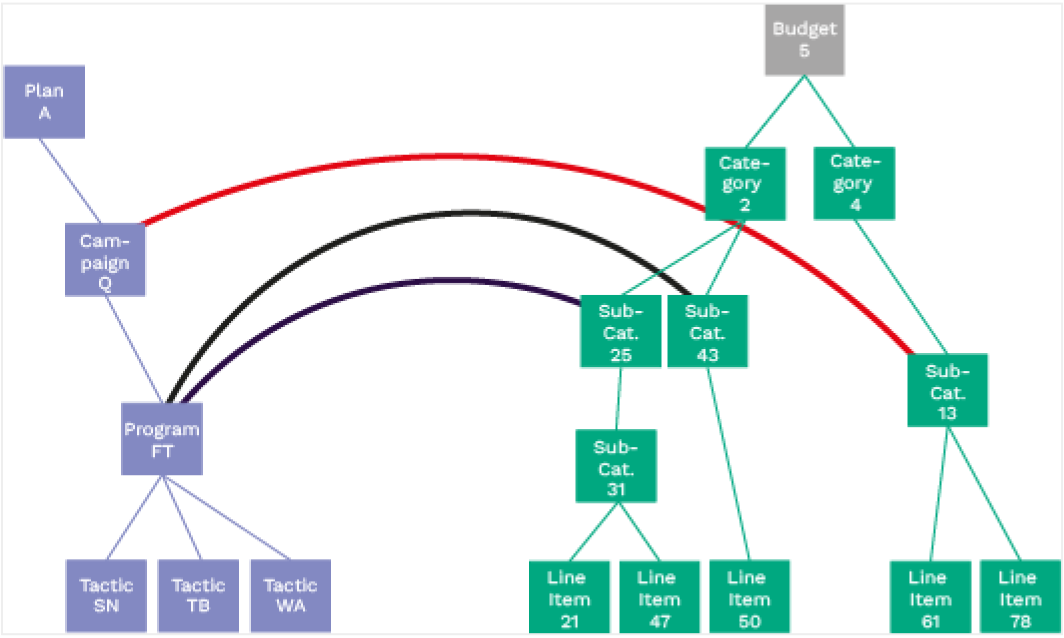
This could be a possible linkage:




But there is more to this Rule 3: If paths are linked, further links can only be created within the linked paths, not outside!

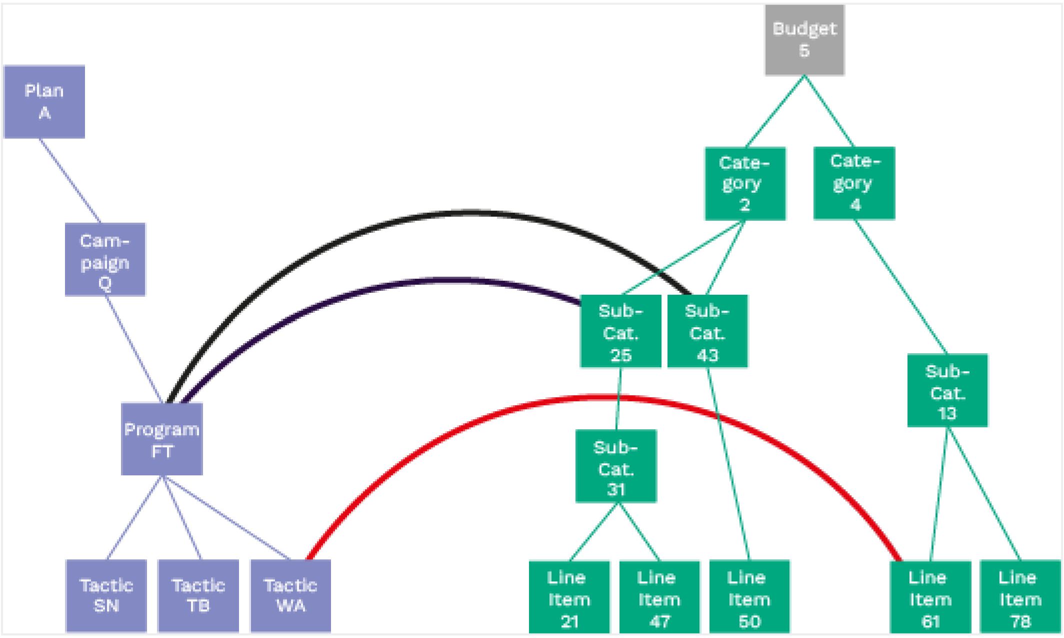
The following images show links in red that are not possible as the links for *Program FT* have been set first and thus have defined the linked paths within the investment plan:

- *Campaign Q* cannot be linked to another path in the *Budget 5* plan:




However, it is possible to link *Campaign Q* to another investment plan, see Rule 4.

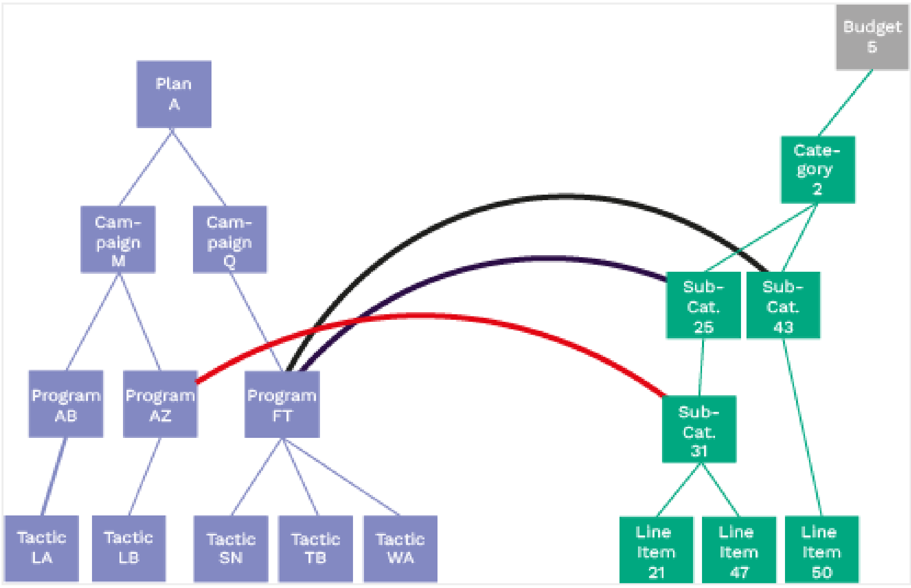
- *Tactic WA* cannot be linked to *Line Item 61*:





- *Program AZ* (sibling of *Program FT*) cannot be linked to *Sub-Category 31*:

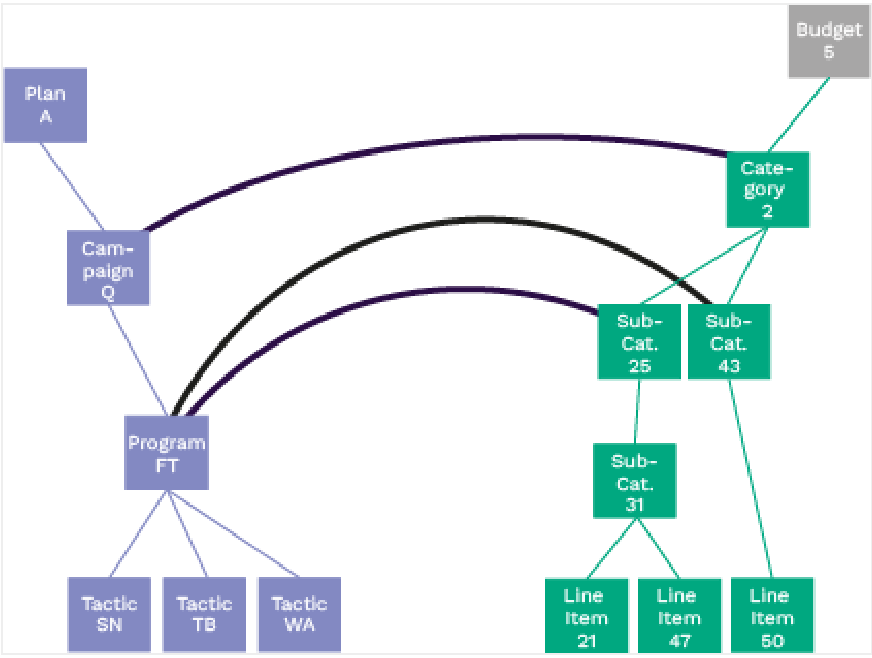



So an important consequence of this rule is that you should pay special attention to the initial linking of paths in the activity and investment hierarchies. These first links determine which further links are possible within the paths.

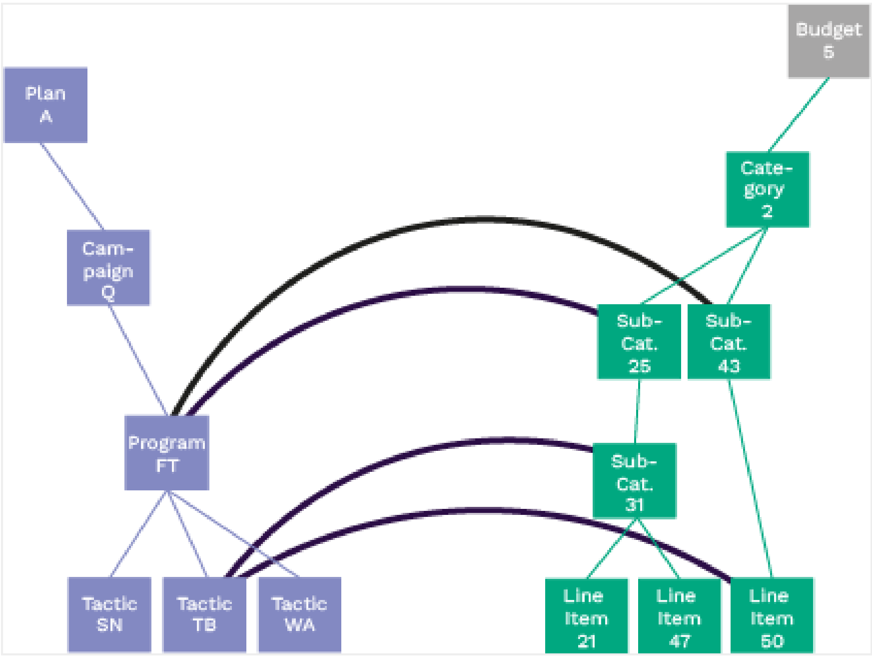
## Rule 4: The Highest Linked Activity Can Be Linked to Another Investment Plan.

As we have seen in rule 3, within an investment plan the first link determines which paths are connected and how further links can be placed in these paths. Rule 4 determines where you can create the possibility for further links to other investment plans. This is always the highest linked activity in the hierarchy.

In the following graphic you have this possibility at *Campaign Q*.




In the following linking this is *Program FT*, because *Campaign Q* is not linked.



## 3.7 Planned Impact

When planning marketing activities, you may have tangible results in mind. However, it is not easy to demonstrate the connection between these expected results and potential revenue generation and, therefore challenging to justify the required investment. Impact modeling allows you to project expected revenue from marketing activities based on your demand-generation goals. This process is essential in maturing marketing teams from being spend-oriented to result-driven.

To find out which revenue your marketing activities will generate, you can provide performance plan data as a first guide, for example, number of inquiries that should be generated by an activity. Your system administrator also maintains conversion rates, velocity and average deal sizes for your company's sales & marketing funnel. Based on this information, Uptempo calculates when the activity should generate what revenue.

### Plan Performance Data Within the Hierarchy

Within the activity hierarchy, the plan performance data should only be entered for activities on the same level. Note that the data can be entered only once in a path.

> TIP
>
> We recommend to enter plan performance data as far away as possible from the root element.

A roll-up is displayed for ancestor activities. The roll-ups includes blended numbers for inquiries, velocities and deal-sizes in case exceptions are used for impact calculations.
No information about the planned performance can be given for descendants.

### How to enter Performance Plan Data

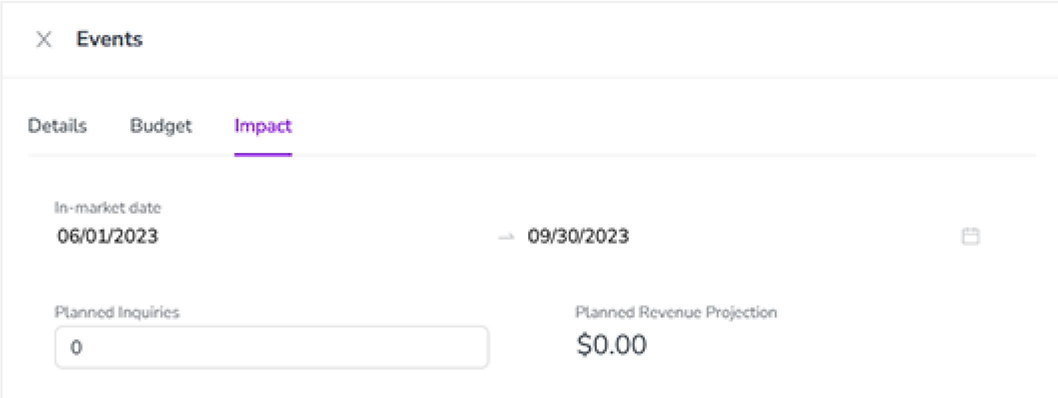
Plan performance data can be entered in the *Details* panel on the *Impact* tab.

> *Note*
>
> The specification of attributes can have an influence on the calculation of the performance plan data. We therefore recommend that you first edit all attributes of the activity on the *Details* tab. Only then calculate the performance plan data.

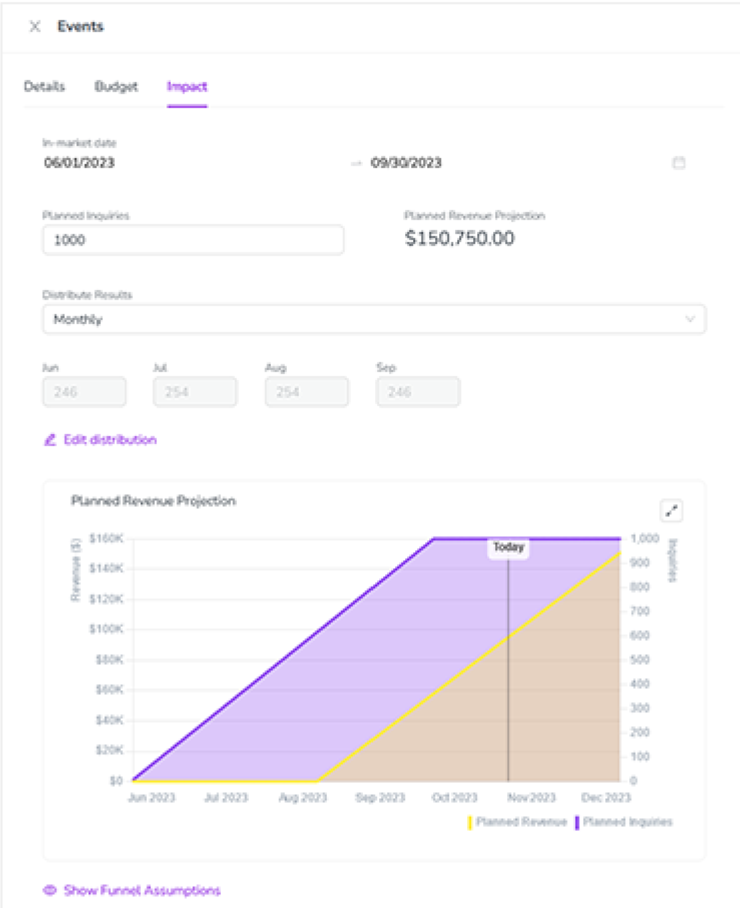
The following screenshot shows the default *Impact* tab:



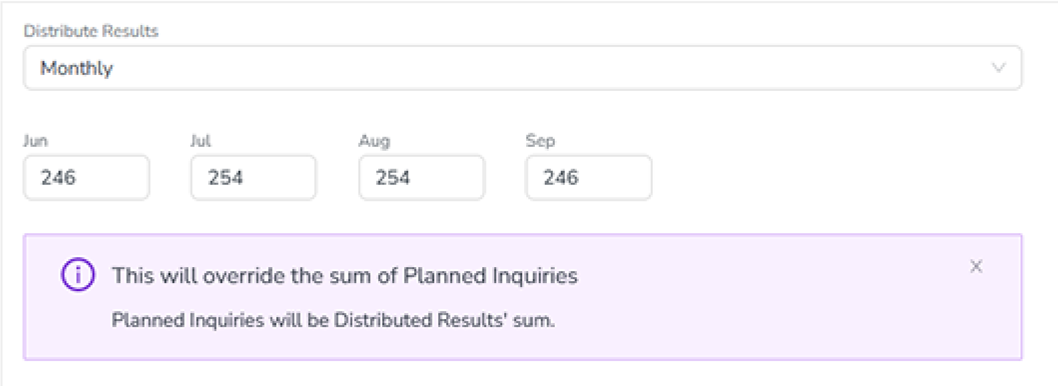
 



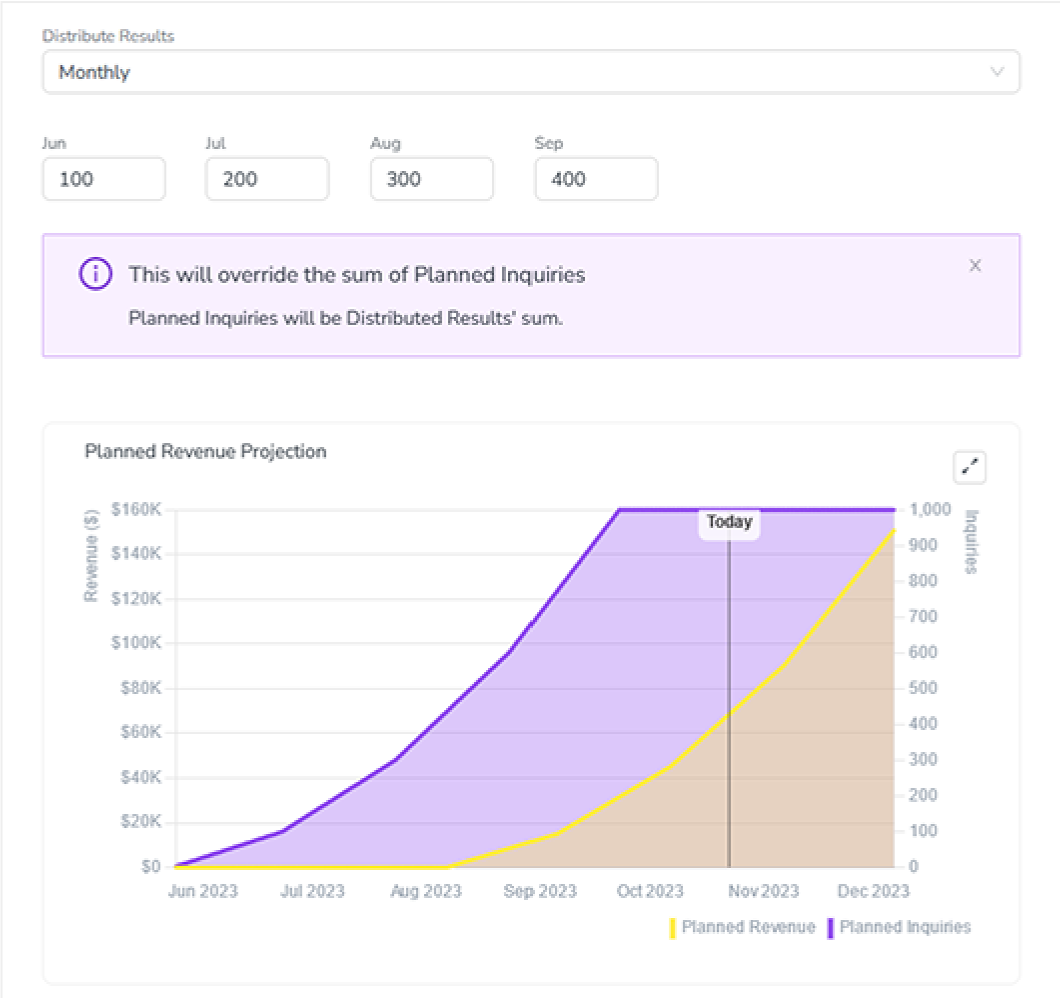

When you enter a number in the *Planned Inquiries* attribute, the system calculates the plan performance data based on the funnel information:




It is assumed that the planned inquiries are generated within the in-market dates. The system uses the funnel definition to calculate the planned revenue. Initially, a linear distribution over the in-market dates is assumed. However, you may know that, for example, fewer inquiries are generated at the beginning and more at the end. Since this influences when which renevue is generated, you can adjust the distribution. To do this, select *Monthly* or *Quarterly* in the *Distribute Results* dropdown and then click *Edit Distribution*. This opens the according time range fields:



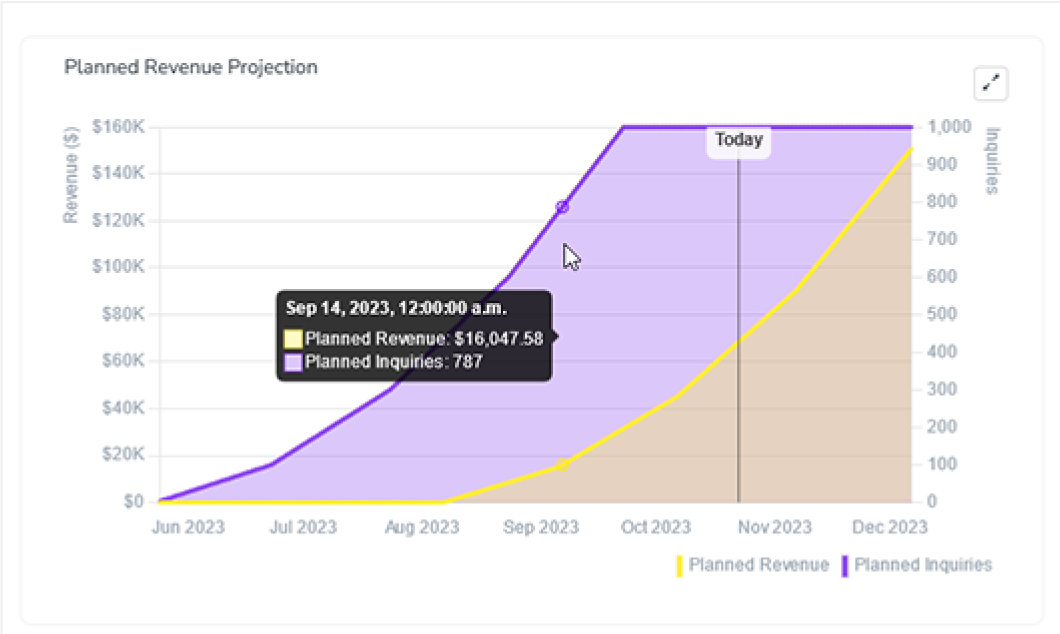

Choose whether you want to enter the distribution monthly or for the quarters. Then enter the numbers in the month or quarter fields. The sum of the numbers will overwrite the *Planned Inquiries* field. The *Planned Revenue Projection* diagram will automatically be updated. The following screen-shot shows an uneven and increasing number of inquiries each month:




When hovering over the projection chart, a tooltip is displayed showing the planned revenue and planned inquiries for the respective date.

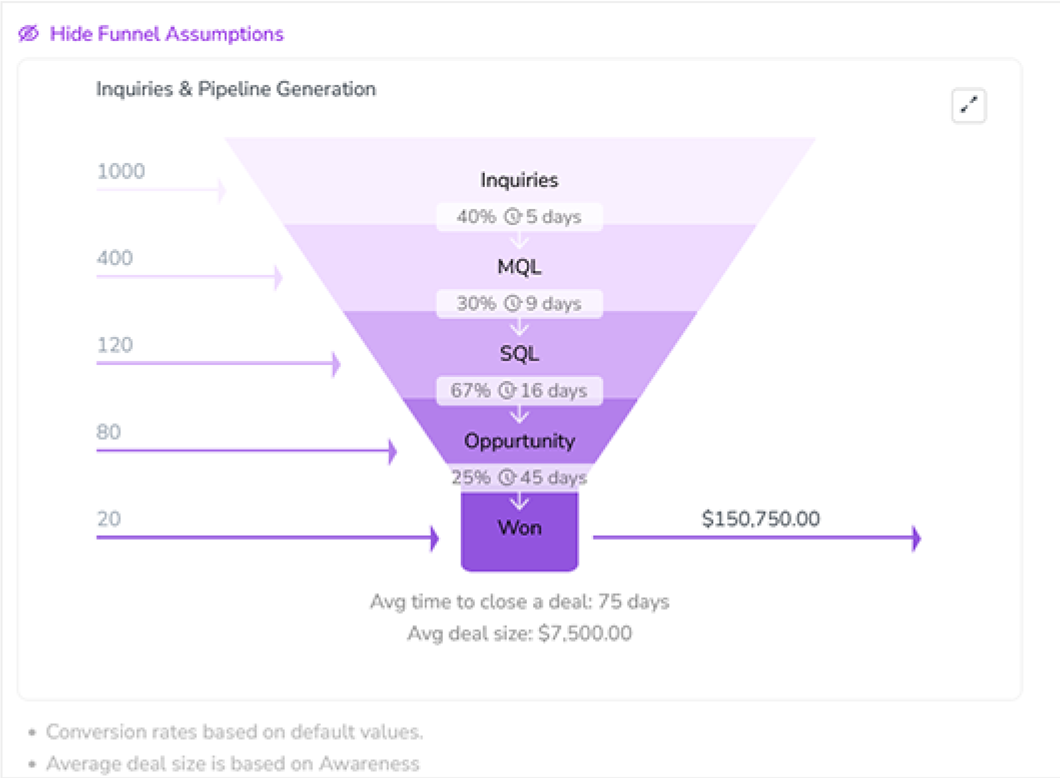





Clicking expands the chart.

If you want to know with which data the funnel is defined, for example conversion rates or average deal size, click *Show Funnel Assumptions*. This will additionally show the funnel defined for this activitiy:


Hide Funnel Assumptions
Inquiries & Pipeline Generation
1000
400
120
80
20
Inquiries
40% 5 days
MQL
30% 9 days
SQL
67% 16 days
Oppurtunity
25% 45 days
Won
$150,750.00
Avg time to close a deal: 75 days
Avg deal size: $7,500.00
Conversion rates based on default values.
Average deal size is based on Awareness

## 3.8 Editing an Activity

1. In the side navigation, click > *Activities*.
2. Click the name or timeline of the activity you want to delete.

   The activity's *Details panel* is displayed on the right side. The *Details* tab is shown.
3. Optional: Edit the attributes displayed on the *Details* tab if needed.

   Each changed attribute is saved when you leave the field, for example by activating the next attribute or clicking outside the field.
4. Optional: Switch to the *Budget* tab.
5. Edit the funding of the activity: Link additional budget, or, if not needed anymore, click × to unlink planned spend.
6. Optional: Switch to the *Impact* tab.
7. If the activity is a point where plan performance data is to be captured: Edit the plan performance data if needed.
   Note: The specification of attributes can have an influence on the calculation of the performance plan data. We therefore recommend that you first edit all attributes of the activity on the *Details* tab. Only then calculate the performance plan data.
8. Optional: If you want to edit a possibly linked workflow:
   a. Click the *Open Workflow* button on the right above the tabs.

      The datasheet is opened.
   b. Edit the workflow as desired. You will find more information on how to edit the workflow in the *Job Manager User Manual*, see *Further Documentation* on page 12.
   c. After finishing all your edits click *Go to Activity* in top right corner of the datasheet.
9. Click × to close the *Details* panel.

You have edited the activity.

# 3.9 Clickable URLs in Activity Details

The *Plan* module supports clickable URLs in the *Details* panel of an activity, aligning with the existing functionality in the Spend module. This feature enhances your workflow by improving information accessibility.

## How to Use Clickable URLs

1. Navigate to the *Details* panel of an activity in the Plan module.
2. Enter or paste a URL into any text field within the *Details* panel. The system will automatically convert it into a clickable hyperlink.

   You can include both descriptive text and URLs in the same text field. Only the URL portions will be converted to hyperlinks.
3. To create line breaks, use the ENTER or ⏎ key. The system supports manual line breaks within text fields.

   Each text field has a 1000-character limit. Ensure your combined text and URLs do not exceed this.
4. Click on a hyperlink to open the linked resource in a new browser tab or window.

## Additional Information

This feature works with both text and reference type attributes. You no longer need to manually edit URLs to make them clickable. It provides users with direct access to relevant resources within the activity context, reducing navigation time between different resources and creating a more consistent experience across the *Plan* and *Spend* modules.



# 3.10 Editing the In-Market Period

By entering the start and end date of an activity, you define its in-market dates. Over this period the timeline is displayed in the calendar. You can edit the in-market period either in the *Details* panel or in the *Timeline* view.

To edit the in-market period in the *Details* panel, click the name or the timeline and edit the *In-market date* attribute on the *Details* tab in the *Details* panel. For more information see *Editing an Activity* on page 63.

Additionally, you can edit the timeline directly in the Timeline view.

## Move Timeline

Move the timeline if the timeline's length should remain unchanged, but start or end date must be redefined.

1. In the side navigation, click > *Activities*.
2. Hover with the cursor the timeline you want to move. Make sure that the cursor is not in the activity's end areas. For example, place the cursor on the displayed name of the timeline.
3. Click and drag the timeline to desired time period.

The in-market period is adopted to the new start and end date. The timeline's length remains unchanged.

## Set New Start or End Date

Set a new start or end date if this changes the total length of the timeline.

1. In the side navigation, click > *Activities*.
2. Hover the mouse cursor over the start or end area of the timeline, depending on which area you want to change.

   The horizontal double arrow is displayed.
3. Click and drag the timeline's start or end date to the desired date.

The in-market period is adopted to the new start or end date. The timeline's length is adjusted accordingly.

## 3.11 Finetuning Estimated Costs

The *Estimated Cost* feature can be used for top-down as well as bottom-up planning:

- In a top-down scenario, enter your estimate for the top level activities at an early stage. Later, when the tactics are created, you distribute the values to the next level of the planning hierarchy.
- In a bottom-up use case, enter the estimated costs for children activities first. The total suggested by children's activities is shown as *Estimated Roll-up* on the parent activity. If the total suggested amount is reasonable, enter the *Estimated Roll-up* for this activity as *Estimated Costs*.

The goal is to have the *Estimated Left* amounts equal to zero for all activities. The most convenient way to do this is to edit the *Estimated Costs* in the *Summary View* on page 21. To edit the *Estimated Costs* field for an activity in the *Summary* view, double-click it and then adopt the value.

# 3.12 Filtering and Grouping

You will probably see a lot of activities in the overview over time. To limit the view to a selection of activities with certain characteristics, filter the view. If you want to compare activities with the same characteristics, group these activities. Of course, you can filter and group activities at the same time.

## When You Start

The default settings ensure that you can see all activities for which you are authorized. In the view, the activities are displayed in the hierarchy, not grouped.

> Note
>
> When you leave the *Activities* page, your own filter and group settings will be reset to the default settings.
> Filter and grouping settings persist when you switch from *Timeline* view to *Summary* view and vice versa.

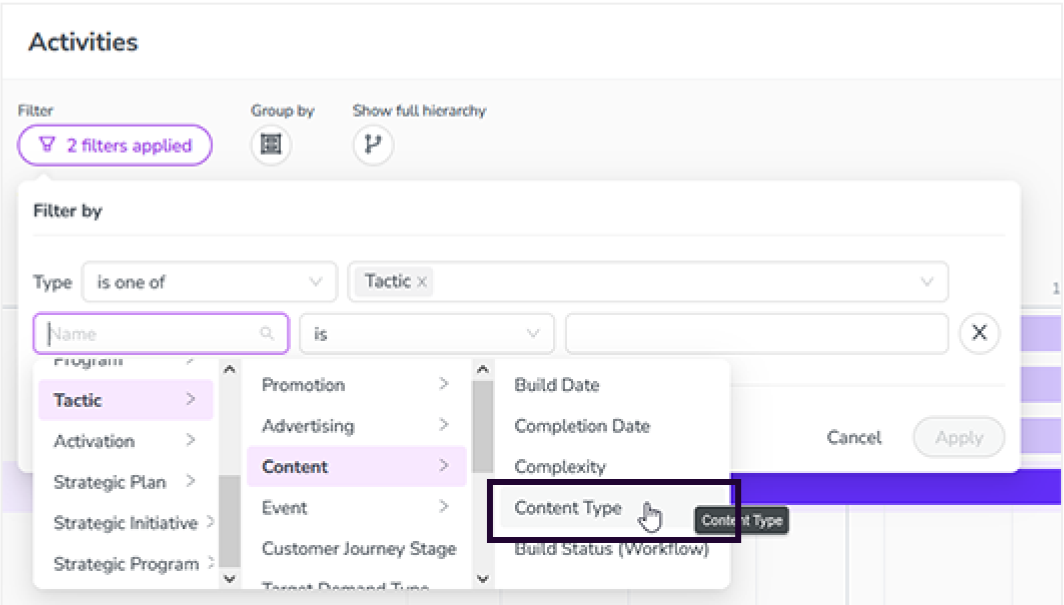
## How Filtering Works

For filtering activities you can use the following characteristics:

- Type: Restrict the view to activities of specific type groups or types.
- Name: Filter for activities with an exact name or whose names contain the entered keyword.
- In-market date: Find activities whose in-market date is or is not specified. You can also filter for activities whose in-market date is in a specific time period.
- Attributes: Restrict the view to activities whose attribute is or is not specified. Depending on the attribute type it is also possible to filter for activities whose attribute equals an exact value or whose value contain the entered keyword. For list attributes you can filter for one or several list entries.

> **Note**
>
> Filtering by an attribute will only apply to the activities that have the attribute. If you filter by an attribute, please also restrict the *Type* filter to the type whose attribute you select. This will guarantee you the most accurate result possible.

The following screenshot shows the selection of the *Content Type* attribute as characteristic. The *Content Type* attribute is assigned to the *Content* type within the *Tactic* group. Note that the *Type* filter is set to *Tactic*:




You can add as many filters as you need. Several filters are AND-linked. An activity must therefore fulfill the conditions of all filters in order to be displayed.

If a filter removes an activity, it also remove its descendants.

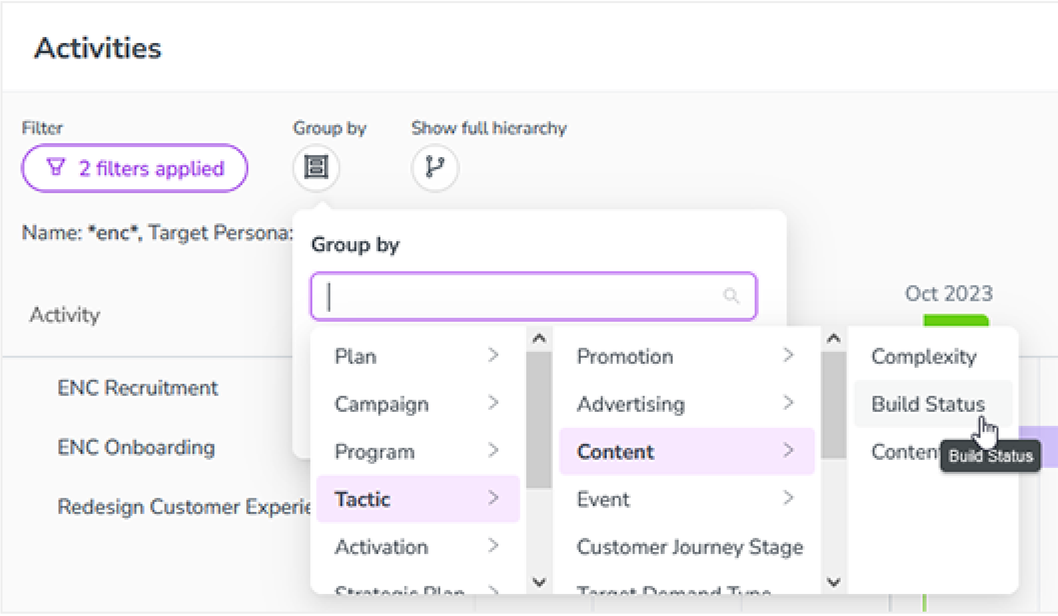
If one or more applied filters only show a list of activities, but you want to see the filtered activities within the hierarchy, click the *Show full hierarchy* toggle. If the toggle is activated, you will see the filtered activities with their ancestors. However, you cannot edit the ancestors or view their details in such a view.

## How Grouping Works

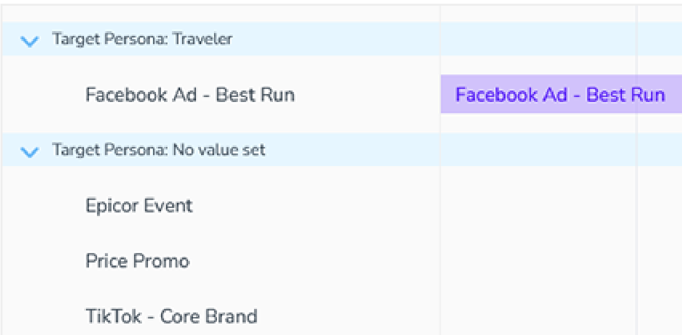
You can always group according to one attribute, single or multi-select lists are available.

The following screenshot shows the selection of the *Build Status* attribute for grouping of activities:




The following screenshot shows grouped activities. The selected attribute is *Target Persona*. Activities to which no value is assigned for the selected attribute are shown grouped under *[Attribute name]: No value set:*




A grouping can only be applied to the activities types to which the attribute is assigned. If you see multiple levels of the activity hierarchy and the hierarchy contains multiple ancestors to whose descendant activities the grouping can be applied, then the descendants are displayed grouped under the respective ancestor.

Note

If you want to see a grouping over all activities to which the attribute is assigned, combine the grouping with a filtering that hides all other activities. An example would be an appropriately restricting type filter.

## Related Actions

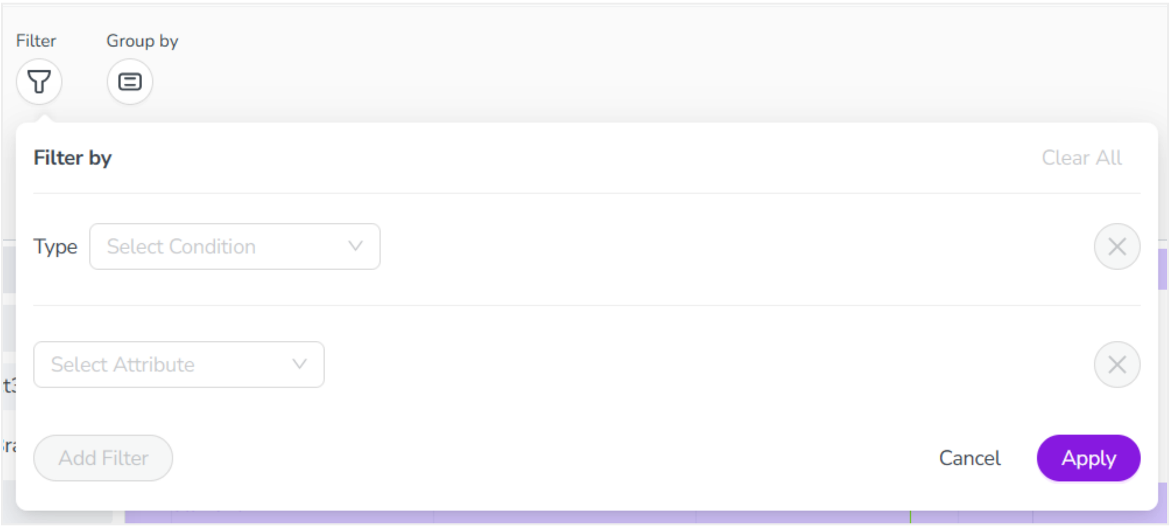
- *Filtering and Grouping Activities* below
- *Resetting Filters and Grouping* on page 74

## 3.12.1 Filtering and Grouping Activities

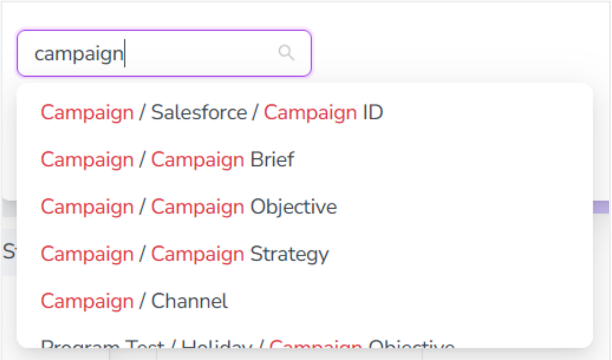
To filter the hierarchy of activities so that it only shows activities that match criteria you have chosen, follow these steps:

1. In Uptempo, click *Activities*.
2. Click the *Filter* button.

   The *Filter by* menu opens.

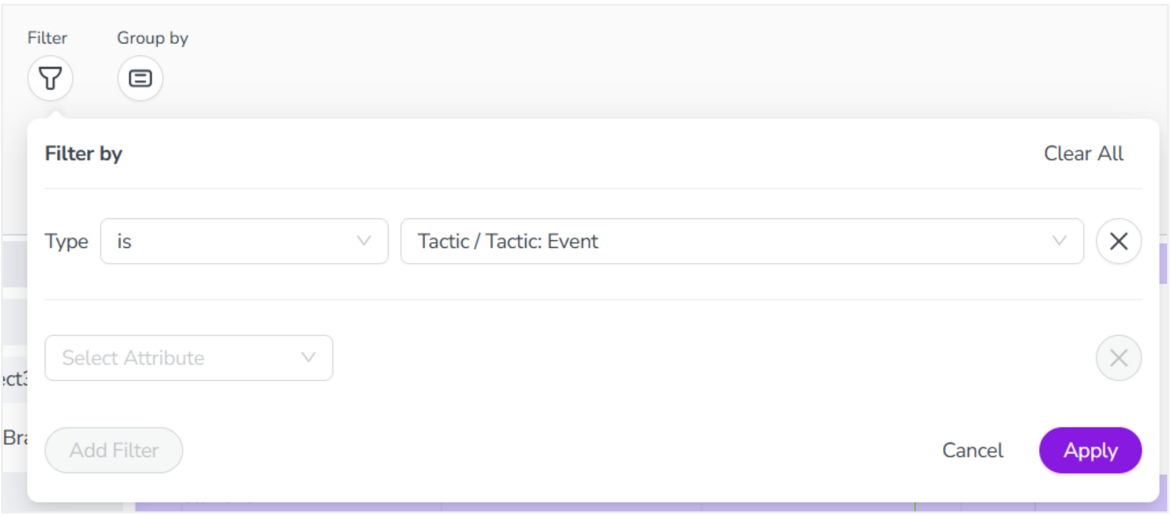
   
   

   Note: You can type keywords into most of the fields in the *Filter by* menu to narrow down the list of selections:



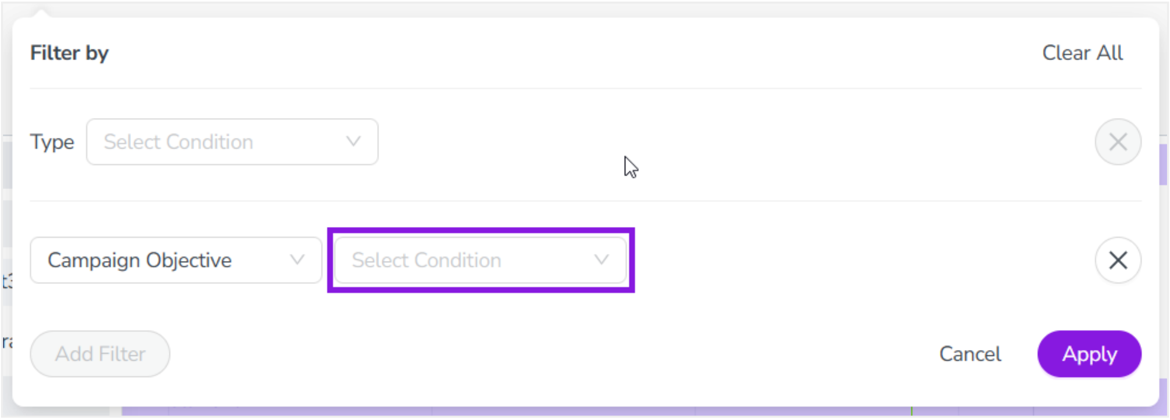

3. To filter by specific activity types, use the *Type* filter. On the line labeled *Type*:
   a. Use the *Select Condition* dropdown menu to choose an operator:
      - *is*: Allows you to specify a single activity type.
      - *is one of*: Allows you to specify multiple activity types.
   b. Use the *Set a Value* dropdown menu to choose the type or types:
      - If you chose the operator *is*, click on the activity type you want to view. The selected activity type is displayed in the *Set a Value* field.
      - If you chose the operator is one of, click on a checkbox for an activity type to select it. Selected activity types are displayed in the *Set a Value* field.

   Note: If a type is shown with a > symbol, you can hover or click on it to view and select subtypes.



4. To filter by any available attribute (e.g. *Name*, *In-Market Date,* etc.), use the *Select Attribute* dropdown menu to choose the attribute you want.

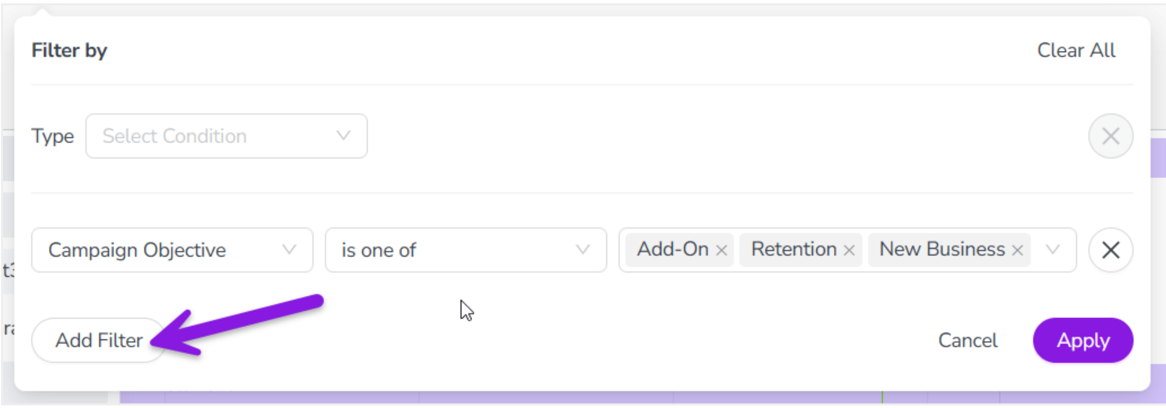
   After you choose an attribute, the *Select Condition* dropdown menu is shown:




5. Use the *Select Condition* dropdown menu to choose an operator:
   - *is*: Allows you to specify a value for the attribute. To be displayed, attributes must have a value for the selected attribute that exactly matches the specified value.

     If you choose this operator, use the *Set a Value* field that is shown to specify the value.
   - *is empty*: To be displayed, activities must have no value for the selected attribute.
   - *is not empty*: To be displayed, activities must have a value for the selected attribute.
   - *contains*: Allows you to specify a value for the attribute. To be displayed, attributes must have a value for the selected attribute that contains the specified value

     If you choose this operator, use the *Set a Value* field that is shown to specify the value.
6. Optional: To add more filter conditions, click the *Add Filter* button.



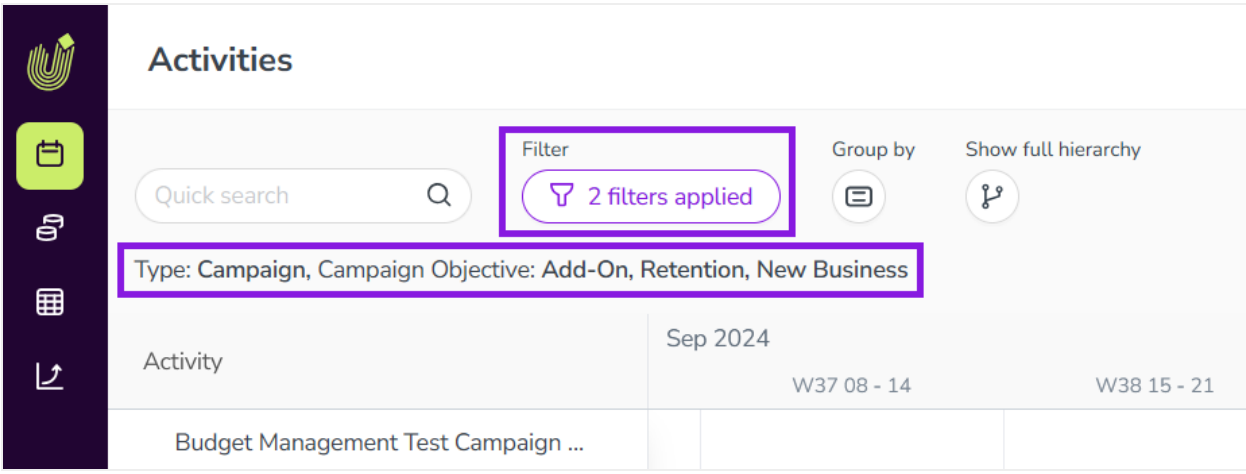
Another *Select Attribute* dropdown menu is displayed on a new line. Repeat steps 4 and 5 to configure the added filter condition.

Note: The *Add Filter* button will be deactivated if any existing filters (except the *Type* filter) have not yet been fully configured.

7. If you want to remove any filter condition you have added, click the × *Remove Condition* button beside it.
8. To apply the filter conditions you have set to the activity hierarchy, click *Apply*.

The *Filter by* menu closes, and the activity hierarchy is filtered according to the filter conditions you have set.

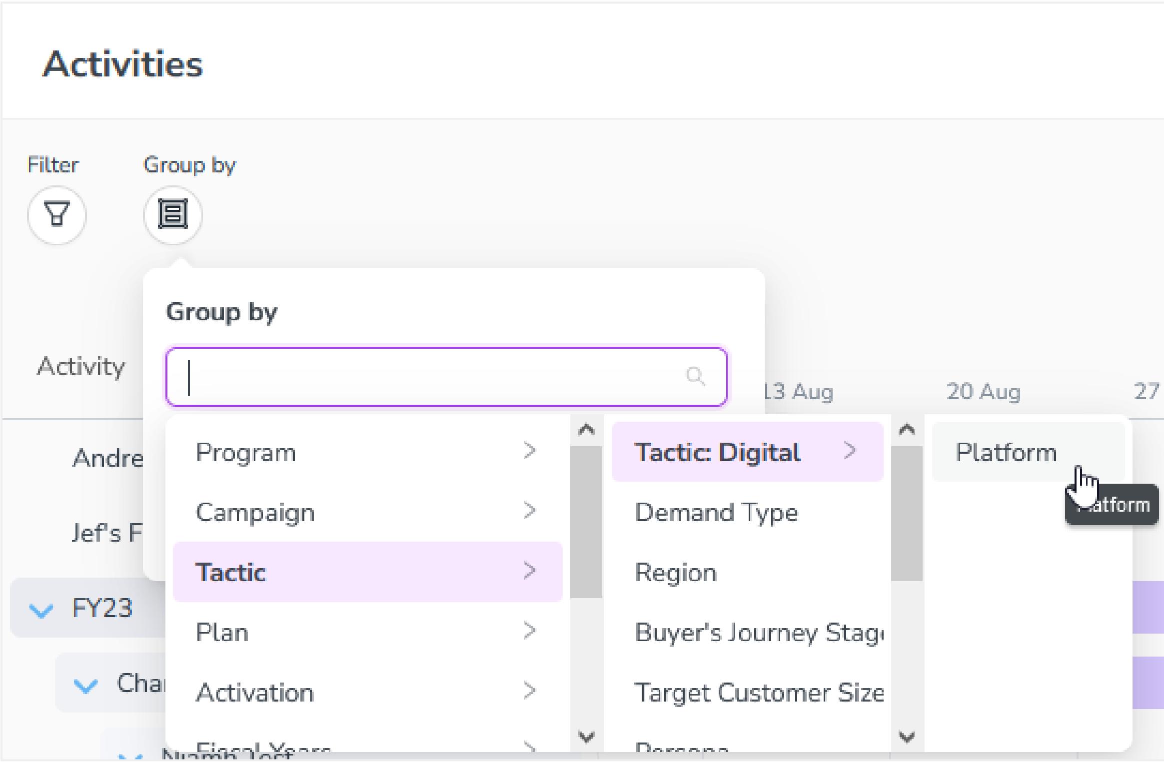
When any filters are active, the *Filter* button changes to display the number of filters currently applied, and the active filter conditions are shown:




To apply grouping to the activity hierarchy, follow these steps:

1. Click the *Group by* button.

   The *Group by* dialog opens.
2. Use the dropdown menu to select the attribute you want to group by.

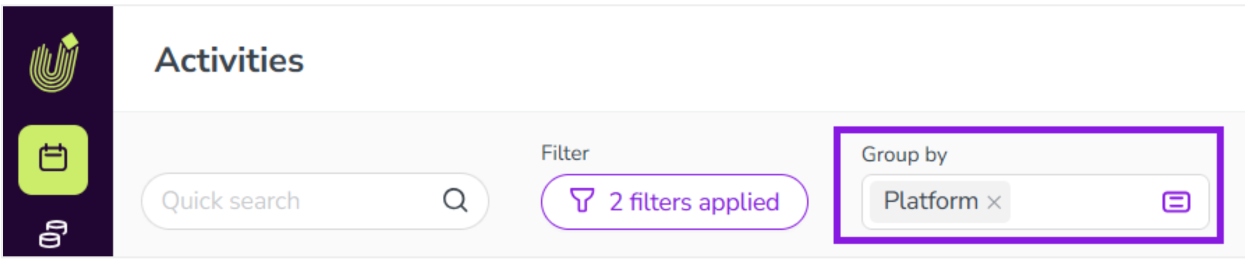



Select an item in the dropdown or enter a keyword to search the dropdown.

3. To apply the grouping, click *Apply*.

The *Filter by* menu closes, and the activity hierarchy is grouped according to your settings.

When grouping is active, the *Group by* button changes to reflect the grouping attribute that is currently applied:




### 3.12.2 Resetting Filters and Grouping

To stop filtering the activity hierarchy, follow these steps:

1. Click the Filter button.

   The *Filter by* menu opens.

2. Choose how you want to reset filters:

   - To remove a specific filter condition:

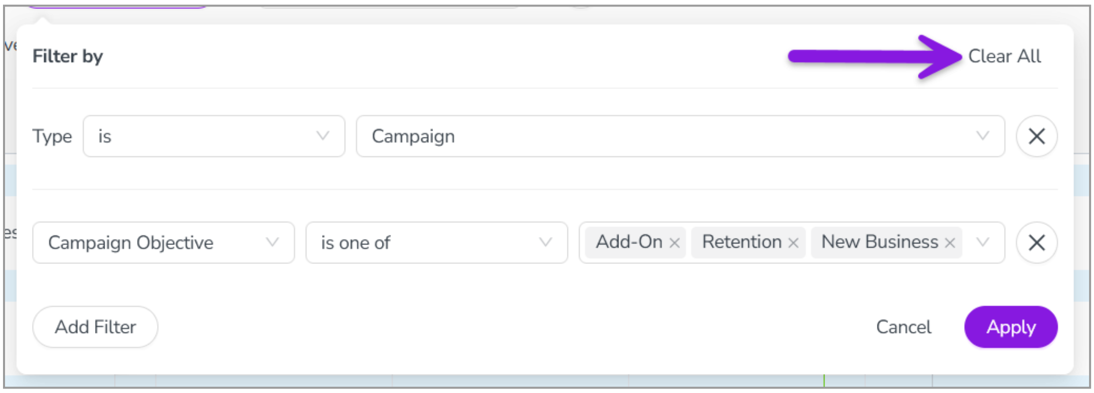
     a. Click the × *Remove Condition* button beside it.

        The filter line is removed.

     b. Click *Apply*.

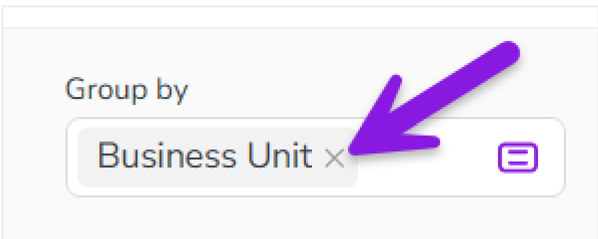
        The *Filter by* menu closes, and the removed filter is no longer applied to the activity hierarchy.

   - To remove all filter conditions, click the *Clear All* button:




     The *Filter by* menu closes, and all previously active filters are no longer applied to the activity hierarchy.

To stop grouping the activity hierarchy, click × on the currently applied grouping characteristic in the *Group by* field:




The grouping condition is removed from the *Group by* button, and the grouping is no longer applied to the activity hierarchy.

# 3.13 Synchronizing Data

When you link a job to an activity, the job and activity can exchange data. Data can be managed both in the activity and in the job and then copied to the other object. When you synchronize the data, the data is copied from the object where it is managed to the other one.

1. In the side navigation, click > *Activities*.
2. Click the name or timeline of the activity you want to synchronize.

   The activity's *Details panel* is displayed on the right side.
3. In the *Details panel*, click the ... button at the bottom right and select *Sync Activity*.

The data of the activity and the job are synchronized.

## 3.14 Sharing a View

Teams often have a set of activities that they care about. Such a set is, for example, a filtered and sorted view of activities in the *Timeline* or *Summary* view. To share a view that is needed by several users, just copy the URL of the view and hand it over to your collaborators.



## 3.15 Deleting an Activity

Attention! Data loss!

Deleting an activity cannot be reverted. In addition, there may be changes to budgets, groupings and other associated items.

1. In the side navigation, click > *Activities*.
2. Click the name or timeline of the activity you want to delete.

   The activity's *Details panel* is displayed on the right side.
3. In the *Details panel*, click the ... button at the bottom right and select *Delete Activity*.

   A security prompt is displayed.
4. Click *Delete*.

The activity will be deleted.



# 4

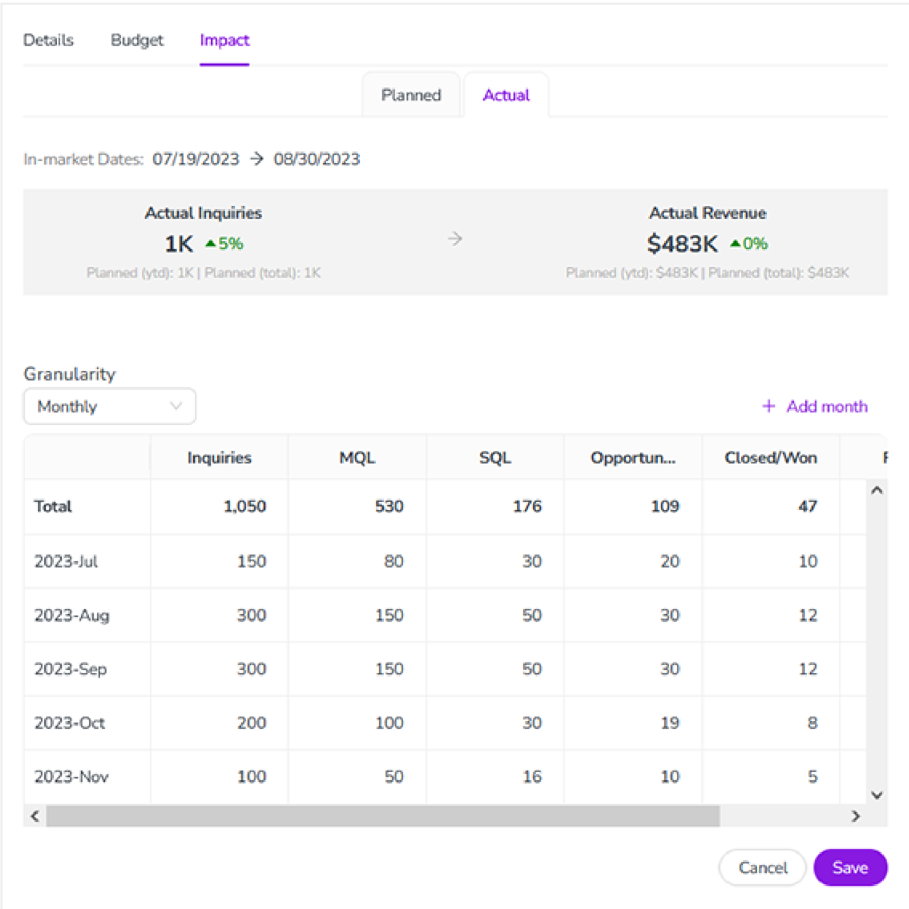
# Tracking Performance of Activities

To understand if the marketing plan performs as expected you must compare it to the actual outcomes. You have the option of entering the actual values and showing them accordingly.

> **Note**
>
> The entry of actual data can only be made once within a path. After an entry, you cannot enter actuals at the parent level unless you want to delete actual impact data for child activities.

## Entering the Actual Results on the Impact Tab

To track performance, the *Impact* tab has now two sub-tabs. The first sub-tab (*Planned*) shows the functions already known for recording the plan values. On the second sub-tab *Actual* you will find the functions for entering the actual values.




| | Inquiries | MQL | SQL | Opportun... | Closed/Won |
|---|---|---|---|---|---|
| Total | 1,050 | 530 | 176 | 109 | 47 |
| 2023-Jul | 150 | 80 | 30 | 20 | 10 |
| 2023-Aug | 300 | 150 | 50 | 30 | 12 |
| 2023-Sep | 300 | 150 | 50 | 30 | 12 |
| 2023-Oct | 200 | 100 | 30 | 19 | 8 |
| 2023-Nov | 100 | 50 | 16 | 10 | 5 |

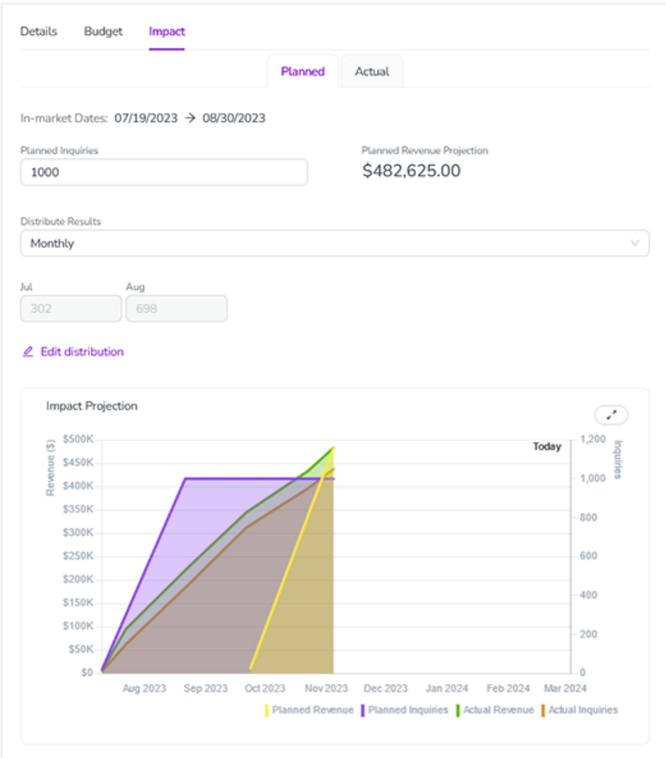
On the *Actual* sub-tab you can enter the actual data, for all funnel stages and the actual revenue. You have the option of entering the data in different granularities, either a total value or divided into quarterly or monthly values. By default, the table will display the periods according to in-market dates plus velocity. If the table does not display a row for the period to be entered, you can add rows.

On the top of the *Actual* sub-tab, you see the comparison of actual impact versus planned impact to date as well as actual revenue vs. planned revenue to date.

Instead of entering the data manually it will also be possible to pull the data from third-party systems via API. This API interface is still in Early Access status, see Early Access and Limited Beta for March 2024 release.

## Analyze an Activity's Performance

As soon as actuals start to come in, they will be shown on the *Impact Projection* chart on the *Planned* sub-tab:



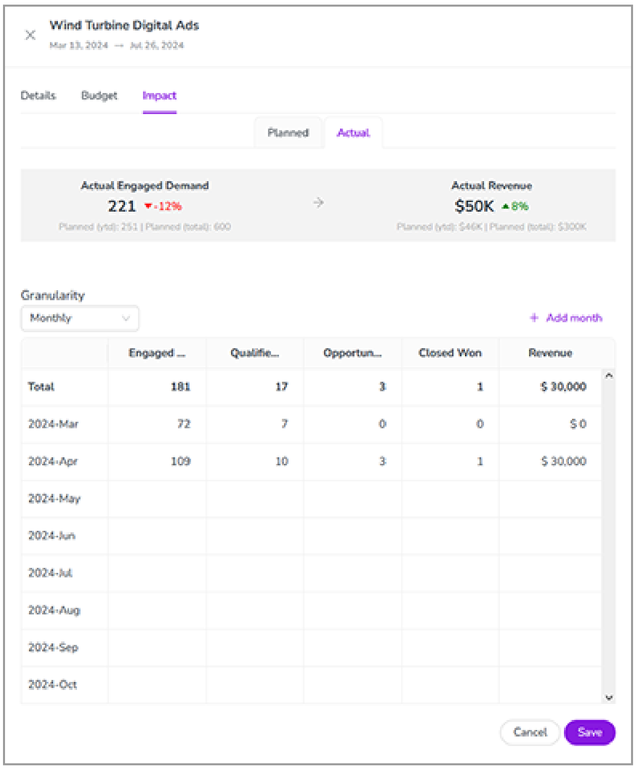


## 4.1 Add or Edit Performance Data

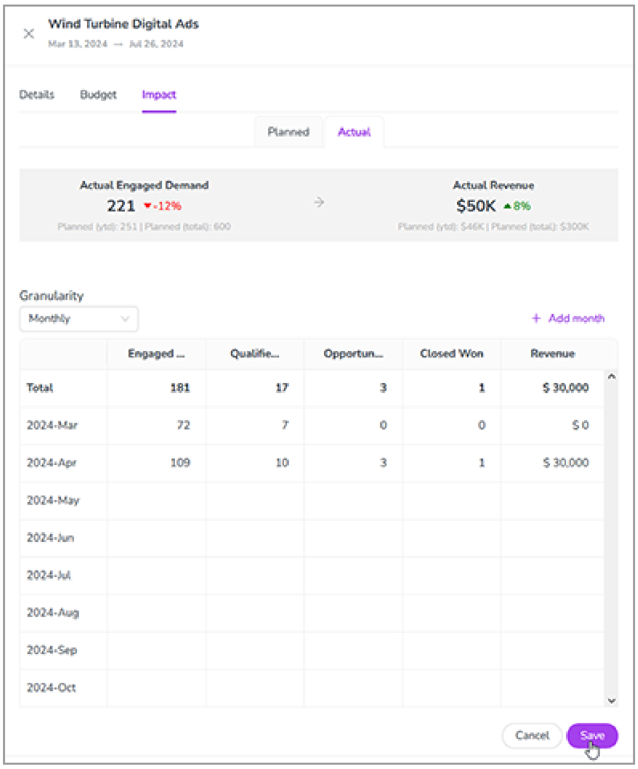
1. Under > *Activities*, search for the activity whose performance data you want to add or edit.
2. Click the activity's name to open its *Details* panel.
3. Switch to the *Impact* tab and click > *Actual*.

   The following page of the *Details* panel is displayed:

4. In the *Granularity* dropdown, specify the time periods for which you want to enter data, either a total value or divided into monthly or quarterly values.
5. In case the period to be edited is not yet displayed in the table, click *Add month* or *Add quarter* respectively.
6. Enter the data in the table. To make editing easier, you can use the tab key on your keyboard to move from cell to cell.

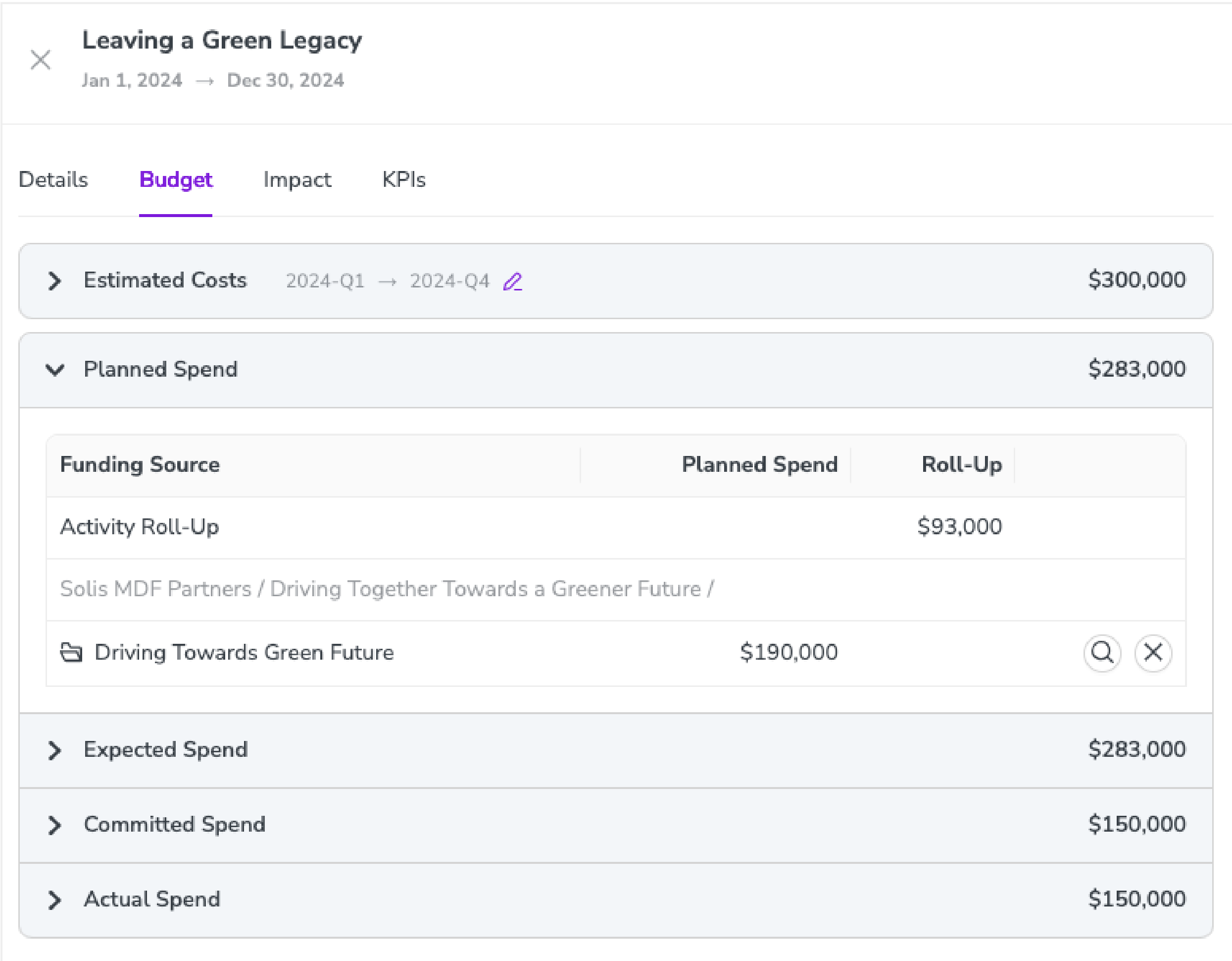
7. Below the table, click *Save*.




The performance data is stored. The data is immediately shown in displays such as the *Impact Projection* diagram on the *Planned* sub-tab or the *Summary* view.

## 4.2 Tracking Spend

While viewing the Details panel of any activity, you can track the spend data of connected investments on the Budget tab. Spend data is broken down into subsections for each of the spend data categories defined in the applicable budget hierarchy, e.g. *Planned*, *Expected*, *Committed*, and *Actual*. Additionally, there is a separate subsection for *Estimated Costs:*



> Note
>
> When you view the *Details* > *Budget* tab for an activity that is connected to an investment, you'll only see subsections for the spend data categories that are configured for the investment's budget hierarchy.
>
> Spend data category subsections are hidden automatically if they are not relevant to an activity, or if the activity is not connected to an investment.

Each subsection on the *Budget* tab displays the sum total of all connected investment amounts for the corresponding spend data category.

You can click on each subsection expand it and see the following additional details:

- *Funding Source*: Information about all connected investments, including name and budget hierarchy position.
- *Activity Roll-Up*: The sum of all investment amounts connected to child activities of the activity you're viewing.
- Spend at current level: The remainder of the total connected investment amount after subtracting the *Activity Roll-Up* amount.

> Note:
>
> If the activity you are viewing does not have child activities, or if none of the child activities are connected to spend amounts themselves, then *Activity Roll-Up* will not display an amount.

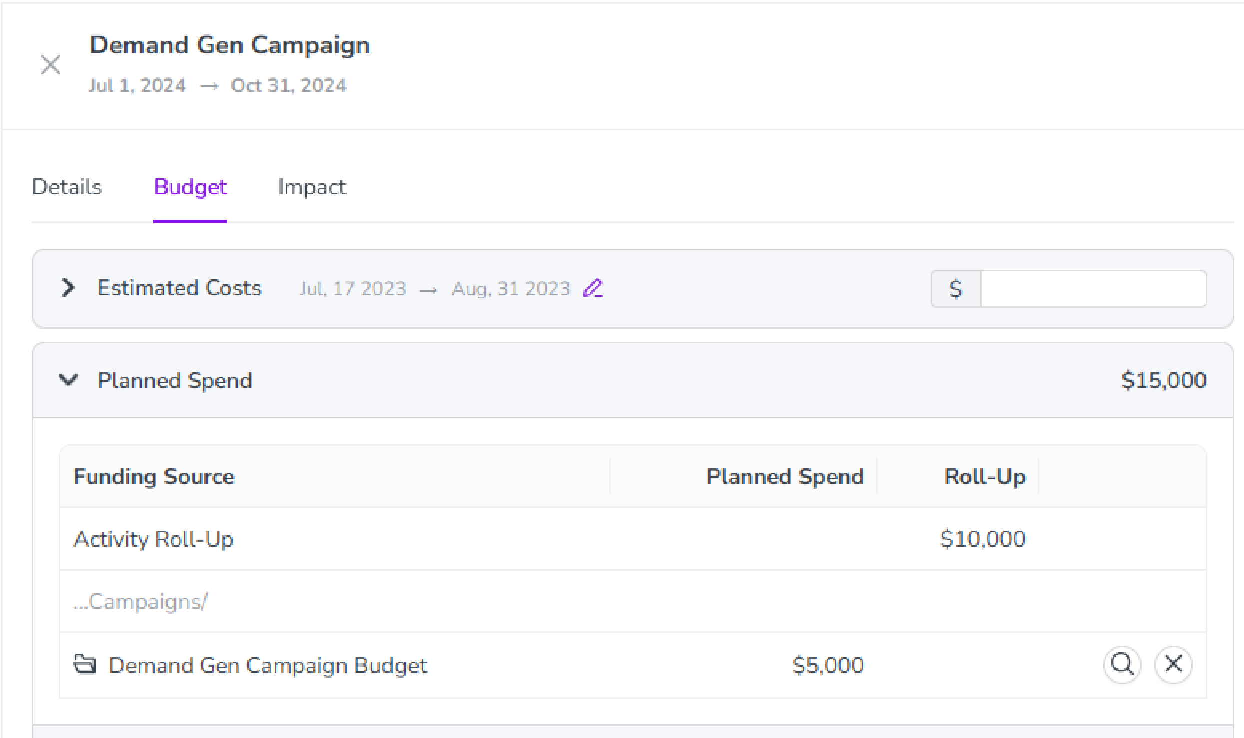
## Understanding Activity Roll-Up and Current Level Spend Amounts

Both activities and investments can exist within a multi-level hierarchy, and you can make connections between them at multiple levels. As you look at different levels of your activity hierarchy, the *Activity Roll-Up* and spend at current level amounts allow you easily see spending at lower levels, and how this affects funding at the level you're currently viewing.

For example, say you connect an activity representing a Demand Gen campaign to a budget category intended to fund that campaign. The budget category contains line items totaling $15,000, so at the beginning, you know that you have $15,000 to fund tactics within the campaign.

As you plan out the campaign further, you can create child activities under the campaign activity for each of the tactics. As you create the tactic activities, you can connect them to specific line items within the budget category to track how much of the overall campaign budget each tactic is consuming, e.g. *Tactic A* is $7,000, and *Tactic B* is $3,000.

At this point, the *Details* > *Budget* tab for the Demand Gen campaign activity would look like this:




In this view, you can see at a glance that:

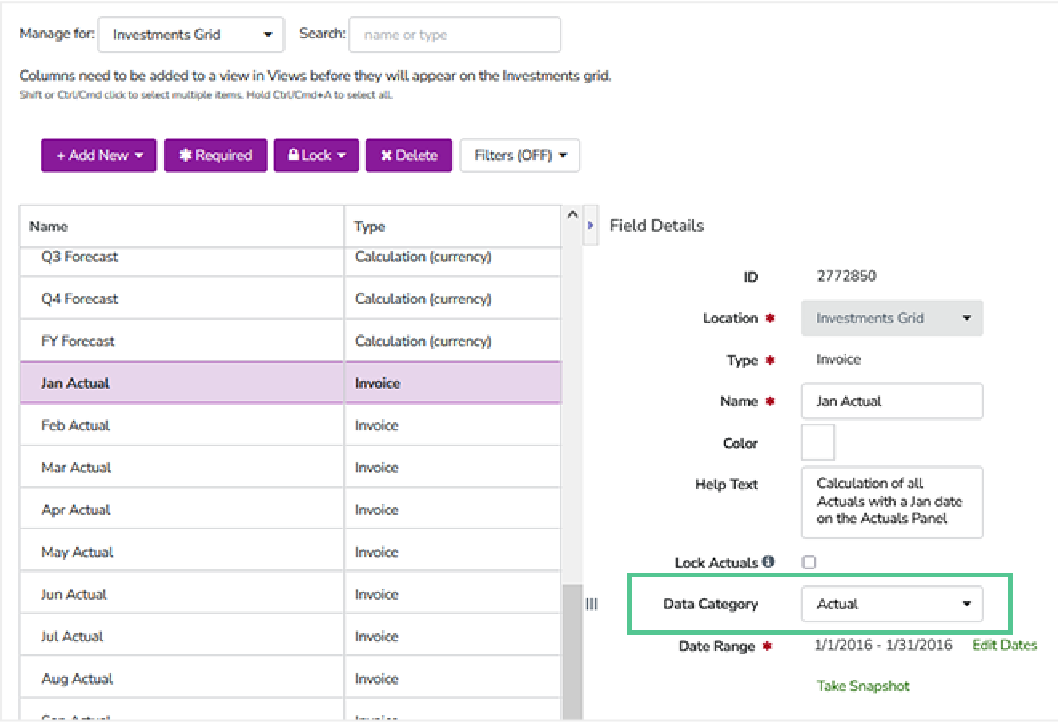
- The total planned spend for this campaign is $15,000 (the total amount available in the connected *Demand Gen Campaign Budget* investment).
- The portion of the investment that is already consumed by child activities of the *Demand Gen Campaign* activity is $10,000 (the amount shown on the *Activity Roll-Up* row, i.e. $7,000 for *Tactic A* + $3,000 for *Tactic B*).
- The portion of the investment that remains available for the *Demand Gen Campaign* is $5,000 (the amount shown on the *Demand Gen Campaign Budget* row, i.e. $15,000 total - $10,000 *Activity Roll-Up*).

This breakdown allows you to quickly understand exactly how much has been spent, and how much remains available to fund other tactics (or reassign elsewhere), when looking at any level of your activity hierarchy.

## How To Activate the Display of the Spend Data Categories

To activate the correct display of the spend data, click *Budget* in the main navigation and then > *Master Settings / Custom Settings*. On the *Columns* page, select the fields you want to display for activities. Activate the corresponding statuses in the *Spend Data Category* field.




> **Note**
>
> Investments are managed in monthly values, but you will be shown a total annual value for activities. The system automatically calculates the total annual value from all columns marked with the corresponding category.
>
> You should therefore review all monthly columns for plan, forecast (expected), and actual data to ensure that you have defined the correct annual value for activities.

In case you don't activate the display of the different spend categories, then the sections on the activities' *Budget* tabs will always show an amount of 0.

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# 5

# Analysis of Activities

To see how you are trending towards your set goals, you have to analyze the activities individually and compare them with each other:

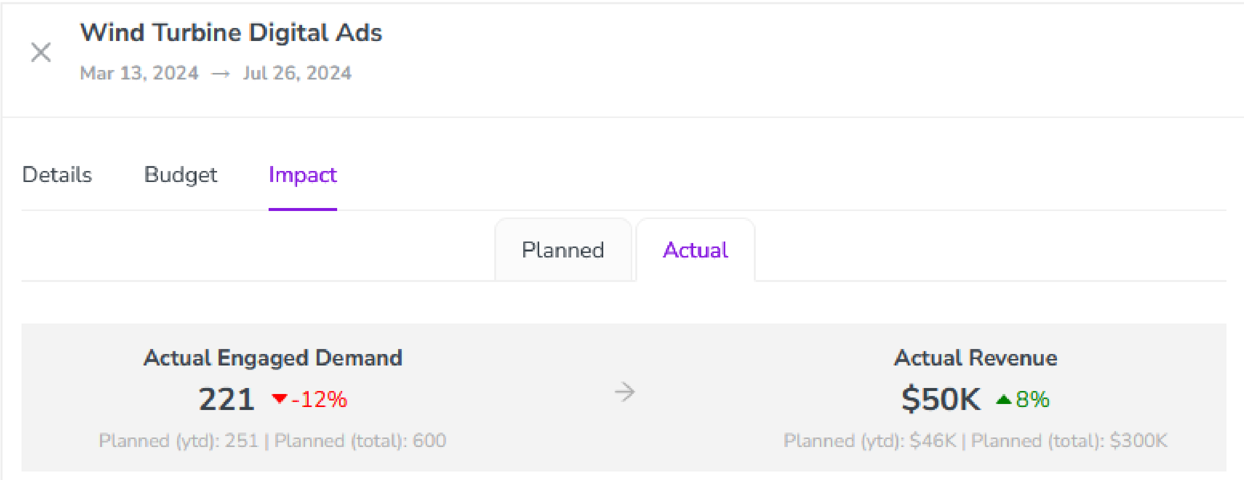
- *Analyze the Performance of an Activity* on the facing page
- *Comparing Activities* on page 94

# 5.1 Analyze the Performance of an Activity

To find out how an activity performs you analyze the data on the *Impact* tab of the *Details* panel. As soon as actual performance data is entered the following elements show the performance for an activity:

## Compare Current Actual Impact and Actual Revenue to Planned Data

As Marketing Ops you want to recognize early on whether an activity is a flop and you should change course or increase efforts. Therefore, you need to understand how the activity performs compared to your plan. To do so, open the *Details* panel. Switch to the *Impact* tab and click the *Actual* sub-tab. On the top of the sub-tab, the following data is shown:

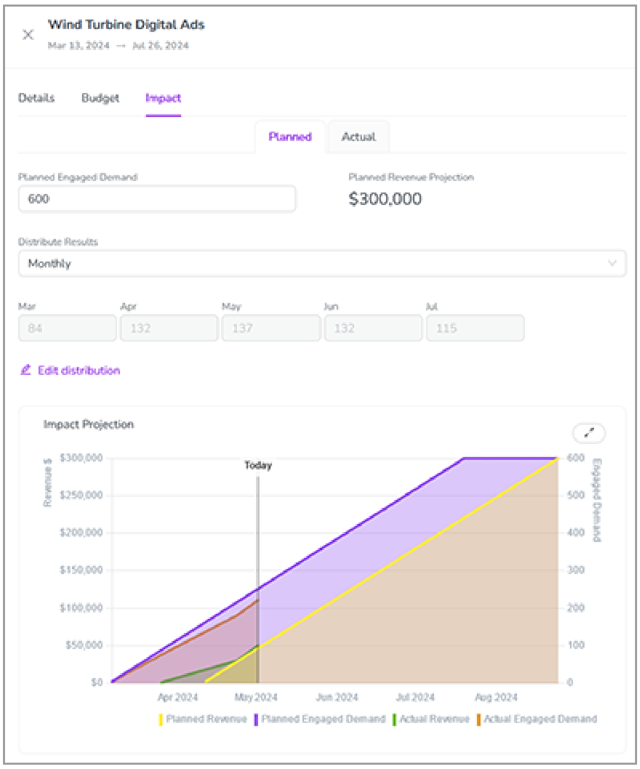



The left number shows the total actual impact of the activity and compares it to the total planned year-to-date (ytd) impact. The percentage shows the result of the comparison. In the example above, the actual impact is 12 % lower than the planned impact.

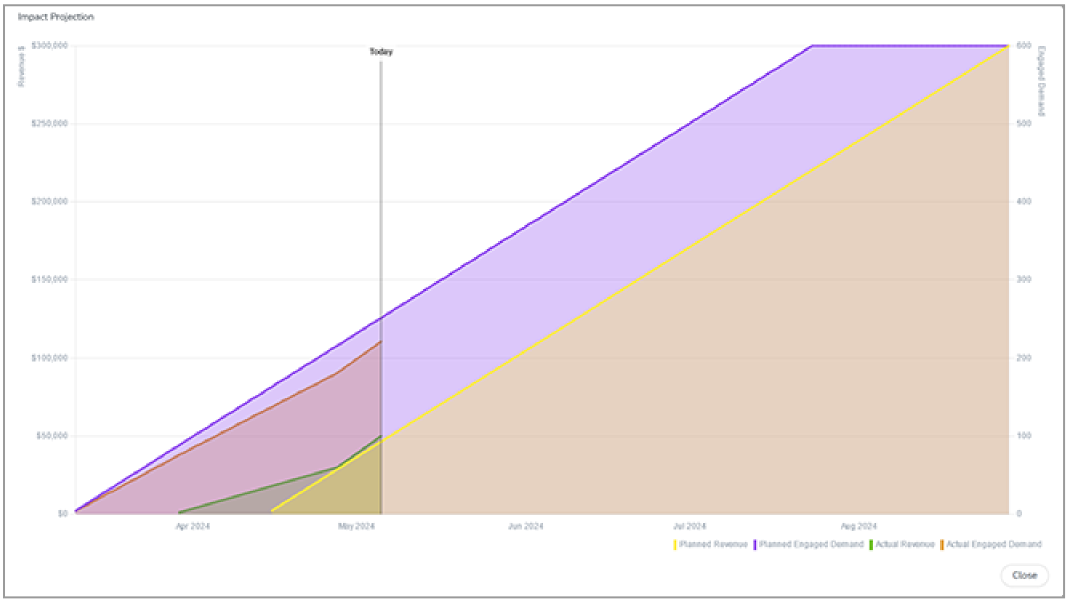
The number on the right shows the total actual revenue and compares it to the total planned year-to-date revenue. The percentage shows the result of the comparison. In the screenshot above, actual revenue is 8 % higher than planned.

## Overview of the Performance History

The *Impact Projection* diagram shows the development of planned vs. actual impact and planned vs. actual revenue as soon as actual data is tracked. To display the diagram, open the *Details* panel and switch to the *Impact* tab. The diagram is shown on the *Planned* sub-tab:




To get a more detailed overview, click the  icon to expand the chart. The diagram is opened in an overlay:



You can hide individual KPIs to restrict the view to specific facts or to make details visible. Click on the respective name below the diagram to hide or show the KPI again.

Click *Close* to return to the activity's *Detail* panel.

## 5.2 Comparing Activities

You see all the information about an activity in the *Details* panel, and you get an overview of the entire plan under > *Analytics*. You can get a simple overview of selected activities in the *Summary* view. This allows you to answer the following questions, for example:

- Did I (my team) assign planned spend to all relevant activities?
- What activities are our biggest investment this quarter?

Answering these questions will give you insight into the importance of the various activities and the integrity of the marketing plan.

The aim of the *Summary* view is to summarize the key data points about the activities or a subset of the plans (when filtering or grouping). This allows you to see how the activities compare to each other and how the overall performance of the plan or subset of the plan is.

You access the *Summary* view by clicking button in > *Activities*.

The *Summary* view currently includes the following data:

- Activity Name
- In-market Dates
- Planned Inquiries
- Estimated Costs
- Estimated Costs Roll-up
- Estimated Costs Left
- Planned Spend
- Expected Spend
- Actual Spend
- Committed Spend
- Planned Revenue
- Planned ROI
- Actual Inquiries
- Actual Revenue

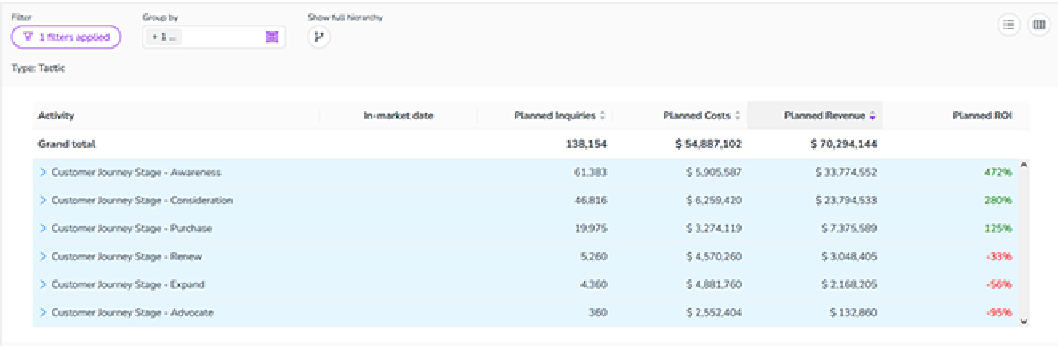


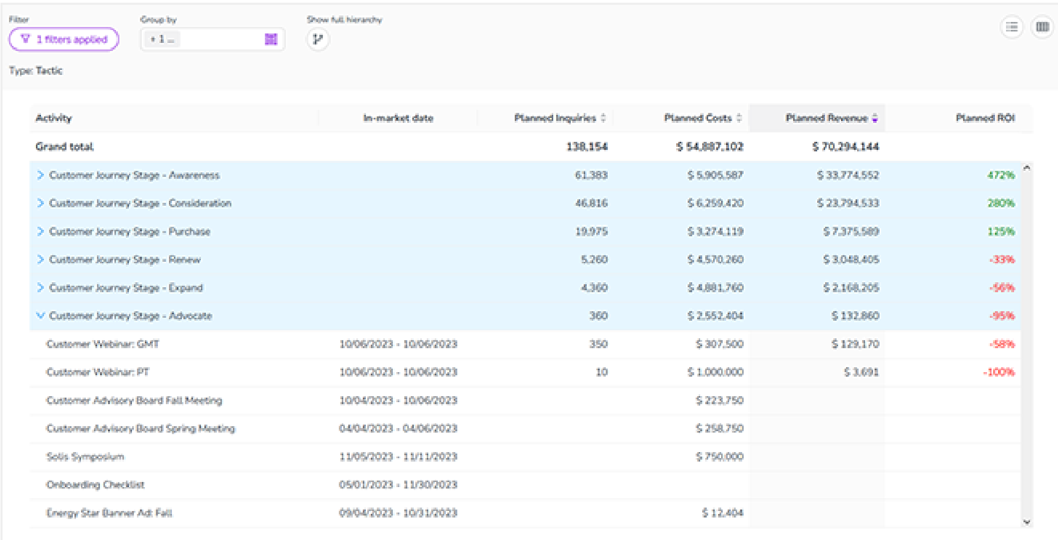
To see only a selection of the columns and to change the order of the columns, click *Edit columns* on the right above the *Summary* view.

Deactivate or activate the checkboxes of the columns to influence their display in the *Summary* view. Drag and drop the columns into the desired order (using the ≡ icon). The order from top to bottom corresponds to the order from left to right.

To use the *Summary* view effectively, filter and group the activities you have access to so that you only see the activities you want to compare, see *Filtering and Grouping Activities* on page 70.
You can also sort the activities according to the individual columns in ascending or descending order. To do this, click on the column name in the respective column. The following example shows activities of the *Tactic* type grouped by *Customer Journey Stage* and sorted in descending order by *Planned Revenue*.




If you expand a group, you will see the associated activities. The values in the cells of the columns are added together to form a group value:





To learn more about the activity including the source of funding and how planned revenue was calculated click the activity's name. The *Details* panel of the activity will open.

For more information on using the *Summary* view for estimated costs, see *Finetuning Estimated Costs* on page 66.

Clicking opens *Timeline* view again.



# 5.3 KPIs

Not all activities exclusively aim to have a positive impact on the marketing and sales funnel. For example, quantitative results for a *Brand Awareness* objective could be measured by the number of impressions.

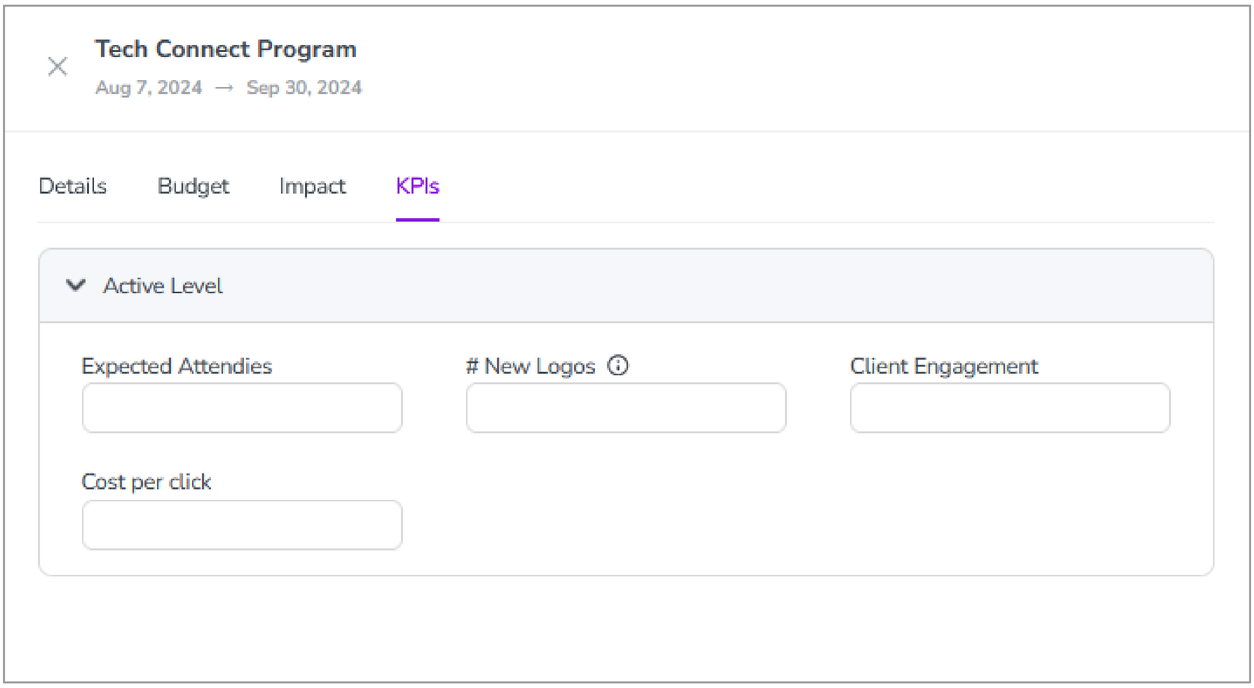
You can set up and track a variety of KPIs. The following value types are available:

- Number
- Percentage
- Currency

The KPIs can be calculated either as summary or as average value. KPIs are assigned to activity types.

## User Impact

After creating an activity you can set up targets for the KPIs you plan to achieve on the *KPIs* tab of the *Details* panel:





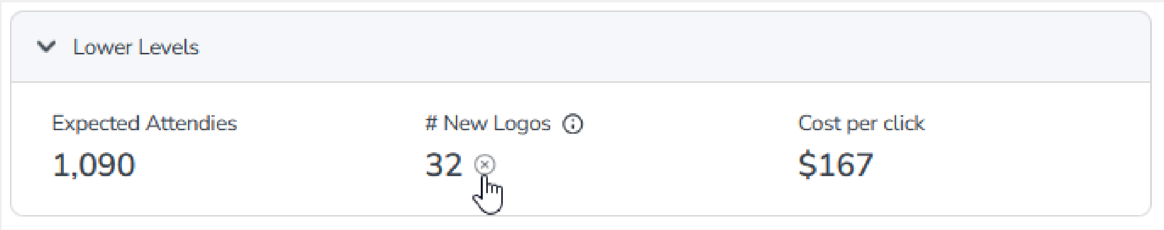
 

Note

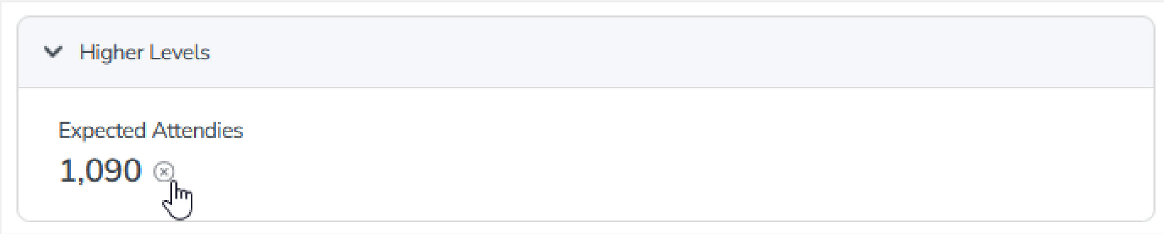
Entering actual results is currently not possible but this feature is planned in Uptempo's mid-term roadmap.

The *KPI* tab shows KPIs in three sections that allow you to compare the KPIs for different levels of the hierarchy:

- *Lower Levels*: This section displays the rolls-ups of the KPIs of lower-level activities. For KPI data to be displayed here, the KPIs must be assigned to the type of activity displayed. If you hover over a value, a ⊗ icon is displayed to the right of it. If you click on the icon, the data of the KPI is deleted from the lower-level activities.




- *Active Level*: This section shows the KPI data of the activity whose *Details* panel you are looking at. Enter your target here.
- *Higher Levels*: This section displays the KPI values of the next higher level activity. For KPI data to be displayed here, the KPIs must be assigned to the type of activity displayed. If you hover over a value, a ⊗ icon is displayed to the right of it. If you click on the icon, the data of the KPI is deleted from the higher-level activity.




## Where To Edit a KPI Within the Hierarchy

A KPI can be assigned to several levels within the activity hierarchy. Note that a value can only be entered once within a branch.

Once a value is entered, editing becomes unavailable on other levels of the branch. In case you want to enter a value on another level, click the ⊗ icon to reset the data. Then re-enter the data at the needed branch level.

A KPI can be assigned to several levels within the activity hierarchy.

Note that a value can only be entered once within a branch.

Once a value is entered at a specific level, editing becomes unavailable on other levels of the same branch.

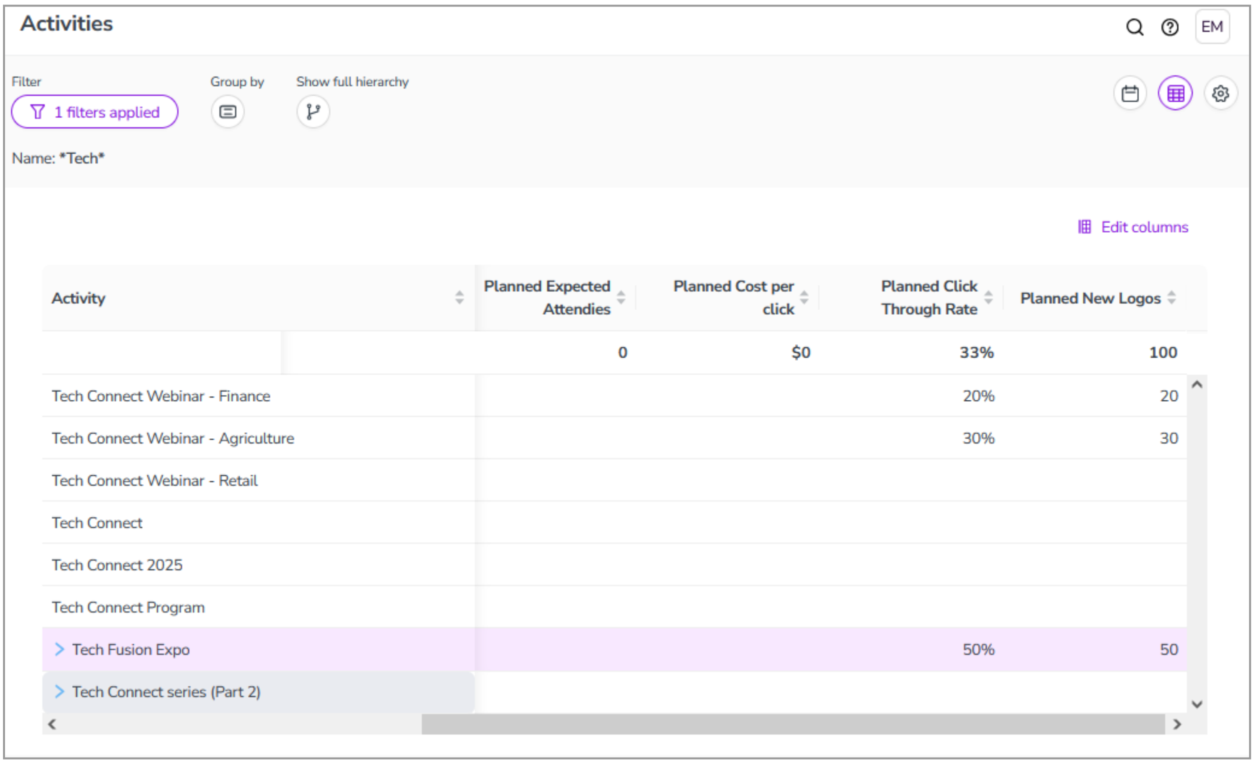
If you want to enter a value on another level of the branch:

- Click the ⊗ icon to reset the data.

After resetting, re-enter the value at the desired level within the branch.

## 5.3.1 Custom KPIs in Summary View

Display custom KPIs in Summary View for better comparison with other activities.




Each KPI can be selected as column to be displayed.

Take a look at the video below to get an idea of what it's all about.

# 6

# Settings

The settings and configurations described below are required to work with activities. Some of the described functions and actions require extensive permissions, which are usually reserved for administrators.

> Note
>
> If you need one of the described functions but cannot use it, please contact your system administrator.

In this chapter we describe how to set up activities and their planning. We recommend the following sequence for a smooth process (including the prerequisites):

### Prerequisites

To be able to set up the activities and their planning, the following requirements must be met:

- User Administration: Access to activity types and activity type groups is assigned to teams and users. To be able to complete the set up, the corresponding users and teams must have been created in user administration.
- Activity structure and data concept: Before you start creating activity types and attributes in the system, you should have a clear concept that answers the following questions:
  - What types of activities exist in your company and how are they hierarchically structured?
  - What data do you need to capture for robust and useful reporting?
  - Which data do you want to capture at which activity type?

If you have any questions, please consult your Uptempo contact person.

### Step 1: Attributes

In this step, create the required attributes. See *Attributes of Activities* on page 104

### Step 2: Activities Types and Their Hierarchy Structure

This phase has the following goals:

- Create templates for activities, the so-called activity types.
- Define which data will be collected for which activities.
- Define the possible structure of the activity hierarchy

See *Activities Types and Their Hierarchy Structure* on page 131

### Step 3: Access to Activities

With policies you define which access users have to the activities. See *Access to Activities* on page 164.

### Step 4: Set up of Impact Modeler

Define how the planned impact of your activites is calculated. See *Impact Modeler* on page 168.

## 6.1 Attributes of Activities

You as the administrator create the attributes and assign them to the activity type groups and activity types. Each activity thus receives the attributes of its type and the possibly assigned group. Users can see and edit these attributes in an attribute's *Details* panel.

For a detailed example of attribute assignment to groups and types, see *Activity Type Group* on page 131.

### How Attributes Work in the Hierarchy

In the hierarchy, activities additionally and invisibly inherit in the background all attribute values of their ancestors. To avoid inconsistencies due to multiple defined values for an attribute, an attribute can only be used once in a path. Therefore, you will not be able to create a rule where a child activity is assigned the same attribute as the parent. Consider this when creating a concept for the attributes you need.

### Attribute Types

You can use different types for activity attributes.

| Type | Description | Example |
|---|---|---|
| Date | A date / calendar attribute | Start or End Date |
| Drop-down list | A drop-down list is a predefined list of options that users can choose from. In Uptempo, a drop-down list helps track attributes for your marketing spend data. We recommend using drop-down lists to help keep data clean and consistent for reporting purposes. | Regions |
| Multi-select list | A preset list of options where multiple options can be selected and the attribution percentage can be weighted. | Marketing Objectives |
| Number or Metric | A non-currency numeric input | Expected Impressions |
| Text or Reference # | A text input field that accepts letters, numbers, and symbols. This field is utilized for any entry that requires all printable characters such as unique IDs, descriptions, notes, etc. The character limit is 255 characters. | Description |

### An Attribute's Properties

In addition to the type, attributes have the following properties:

- Name
- Help description: The configured help text is shown when users hover over the info icon ⓘ .
- In the case of the dropdown list and multi-select list types: List options

> Note
>
> You cannot subsequently change the type of an attribute.
>
> The *Data Category* and *Date Range* fields are also displayed in the details of the attribute properties. These properties currently have no function. Please do not edit these fields.

### Display Order in Details Panel

Attributes are displayed in the *Details* panel according to their order in > *Activities* > *Settings* > *Attribute Definitions*. You can change the display order of the attributes on the *Attribute Definition* page using drag-and-drop.

### Dependencies - Simpilfying Data Entry

Users may have to select values from several or extensive lists when creating the activities. If these lists are logically related, you as an administrator can set up a dependency.

For more information see *Simplifying Data Entry* on page 120.

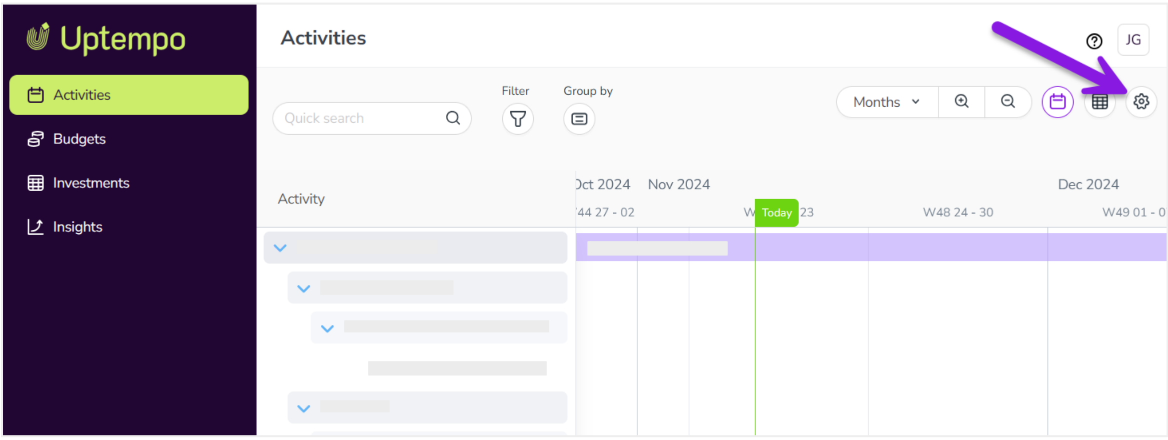
### Related Actions

- *Creating an Attribute* below
- *Editing an Attribute* on page 107
- *Configuring Attributes* on page 108
- *Deleting an Attribute* on page 120

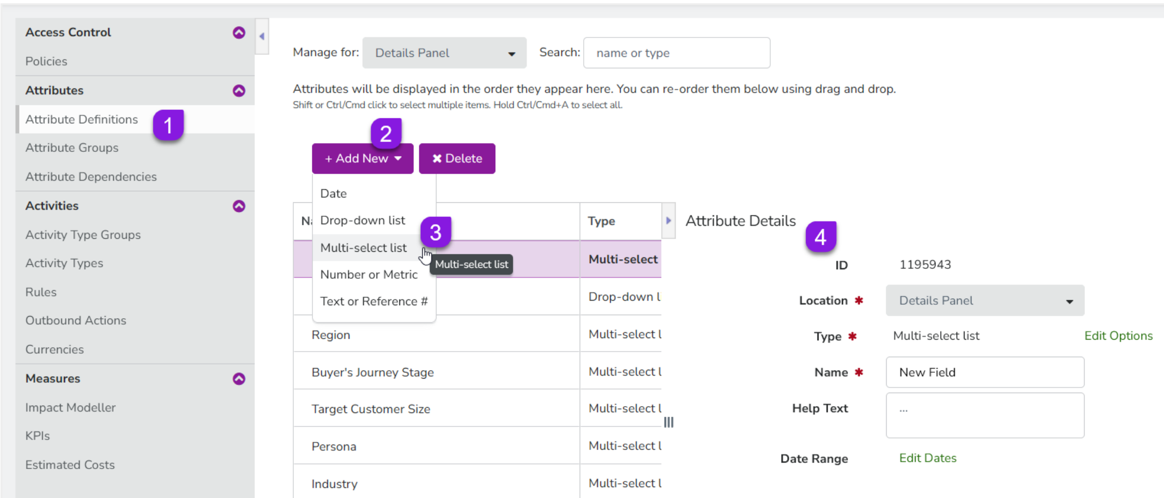
## 6.1.1 Creating an Attribute

To create a new attribute, follow these steps:

1. In Uptempo, click *Activities*.
2. In the *Activities* section, click *Settings.*




3. In the Activity Configuration page that appears, the *Attribute Definitions* section should be displayed by default. If not, click *Attributes* > *Attribute Definitions* in the navigation menu.
4. Click *Add New*, then select the attribute type you want to create from the list. A new attribute with the name "New Field" appears in the list, and the *Attribute Details* panel for the new attribute is displayed:




5. Use the *Attribute Details* section to configure the new attribute. For all attribute types, you can configure the following settings:
   - Enter a name for the attribute in the *Name* field (by default, the attribute will be created with the name "New Field").

- Optional: Enter a brief description or instructions into the *Help Text* field to help users understand and use the attribute as intended.

  Note: The text you configure here is shown when users hover on the info icon ⓘ that appears by the attribute's name when creating or editing an activity.

- For some attribute types, such as *Drop-down list* and *Multi-select list*, there are additional setting that you need to configure. For instructions, see Configuring Attributes.

6. Your changes will be saved automatically.
7. When you are finished, you can exit the Activity Configuration page by navigating to any other section in Uptempo.

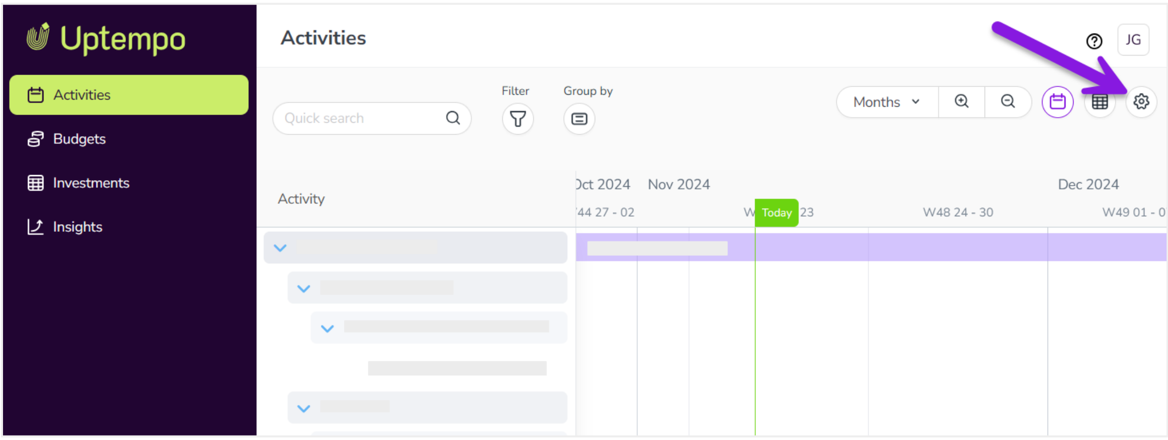
You have successfully created an attribute. To use the new attribute with your activities, you can now add it to individual activity types directly, or to multiple activity types at once through activity type groups.

### 6.1.2 Editing an Attribute

> Note
>
> You can only set an attribute's type when you create the attribute. It is not possible to change an existing attribute's type.

To edit an existing attribute, follow these steps:

1. In Uptempo, click *Activities*.
2. In the *Activities* section, click ⚙ *Settings:*



3. In the Activity Configuration page that appears, the *Attribute Definitions* section should be displayed by default. If not, click *Attributes* > *Attribute Definitions* in the navigation menu.
4. The table in the *Attribute Definitions* section displays a list of all existing attributes:
   - Browse the table to find the attribute you want to edit.
   - You can also enter a keyword into the *Search* field to filter the table so that only attributes with a name or type matching the keyword are shown.
5. Click the attribute you want to edit to open its *Attribute Details* panel.
6. Use the fields and options in the *Attribute Details* panel to make changes to the attribute. Your changes will be saved automatically.
   - For instructions on how to configure each attribute type, see Configuring Attributes.
7. When you are finished, you can exit the Activity Configuration page by navigating to any other section in Uptempo.

You have successfully edited the attribute. All changes will take effect immediately.

## 6.1.3 Configuring Attributes

### 6.1.3.1 Attribute Types

When you create an attribute, you start by selecting the attribute's *type*. The type determines what kind of data value the attribute field will accept and store (e.g. numbers, text, dates, etc.). Each type is also associated with a specific user interface (UI) element. Users use this UI element to set a value for the attribute when they create or edit an activity.

The following attribute types are available:

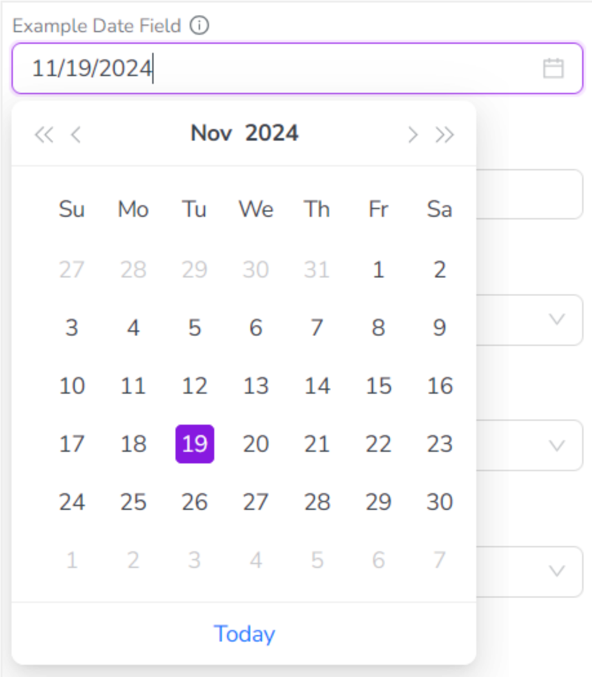
#### 6.1.3.1.1 Date

**Data Type**: Single date values in the format *MM/DD/YYYY*.

**UI Element**: Date picker that displays a calendar. Users can click on a date in the calendar to set the date value, or enter it manually into the input field.



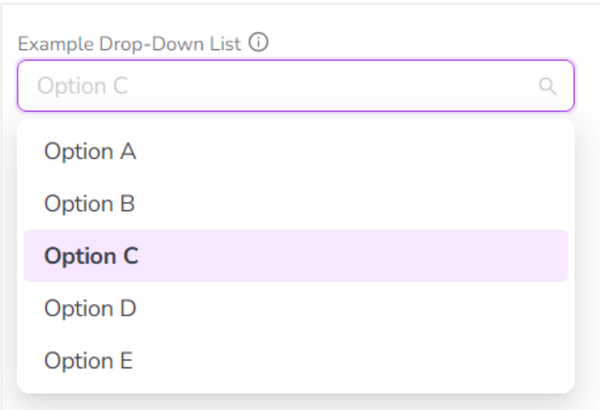
 




### 6.1.3.1.2 Drop-Down List

**Data Type**: Predefined options.

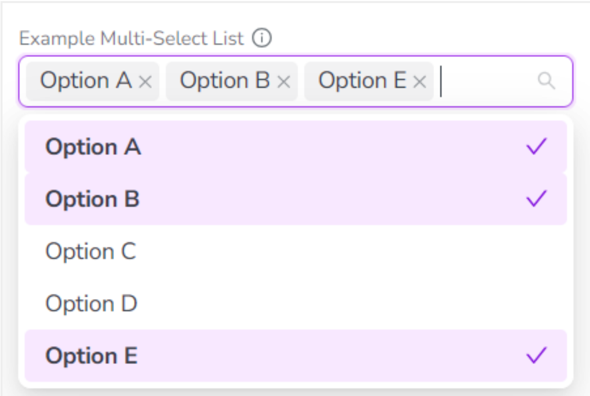
**UI Element**: Drop-down list that displays the predefined options. Users can click on a single option in the list to select it. Users can also type a keyword into the field to filter the options list.



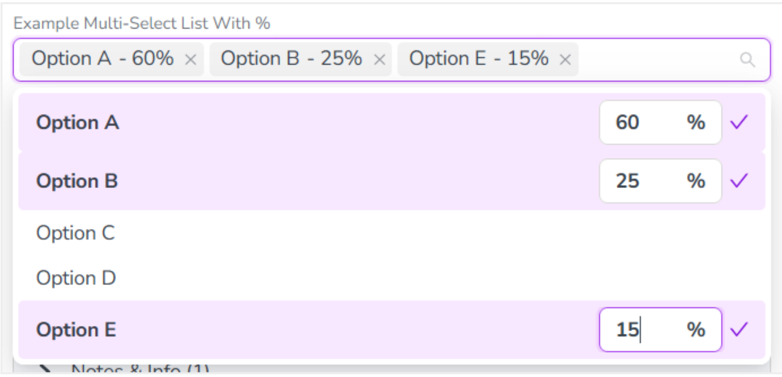

### 6.1.3.1.3 Multi-Select List

**Data Type**: Predefined options, optionally with user-customizable percentages.

**UI Element**: Drop-down list that displays the predefined options. Users can click on one or multiple options in the list to select them. Users can also type a keyword into the field to filter the options list.



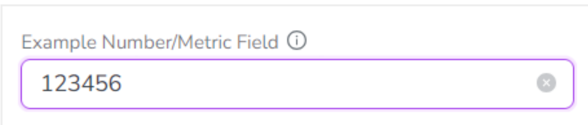

If the percentage allocation feature is enabled, users can also enter a percentage value for each selected option (see Percentage Allocation Setting for more information).




### 6.1.3.1.4 Number or Metric

**Data Type**: Numeric values.

**UI Element:** Input field that accepts values containing only numeric characters (0-9). Values that include non-numeric characters are rejected.




### 6.1.3.1.5 Text or Reference #

**Data Type**: Alphanumeric values.

**UI Element:** Input field that accepts values containing any combination of letter characters, number characters, and special characters.


> Note:
>
> The *Text or Reference #* attribute type supports characters from the *Unicode Basic Multi-lingual Plane*. This includes characters for all modern languages, such as diacritics (e.g. umlauts, accents, etc.), logographs (e.g. characters for Chinese, Japanese, Korean, etc.), and various other symbols.

### 6.1.3.2 Attribute Settings

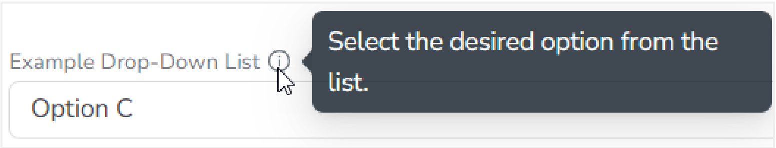
You can configure an attribute's settings when you create a new attribute, or when you edit an existing attribute.

For instructions on how to configure an attribute's settings, see Creating an Attribute and Editing an Attribute.

#### 6.1.3.2.1 Basic Settings

All attribute types have the following basic settings:

- **Location** (required): Sets where the attribute will be displayed.
  - Always set to *Details Panel* by default. This is currently the only available location for attributes, so the setting can't be changed.
- **Type** (required): Sets the attribute type.
  - Set during attribute creation, and can't be changed later.
- **Name** (required): Sets the display name of the attribute. This name is also used as the label for the attribute when a user is creating or editing an activity.
  - By default, this is set to "New Field" for all newly created attributes.
- **Help Text** (optional): Sets the text that is displayed in the attribute's tooltip.
  - If configured, a tooltip icon is displayed next to the attribute label, which reveals the tooltip text on hover:




- If not configured, the tooltip icon is not displayed.

> Note:
>
> All attribute types also display a *Date Range* setting. This setting is currently not used in the system. As a result, we recommend that you do not configure it for any attribute.

#### 6.1.3.2.2 List Options

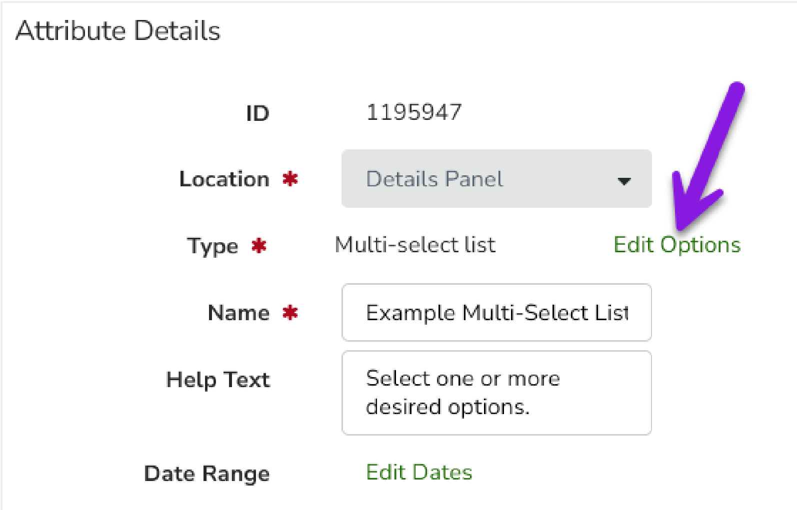
Attributes with the types *Drop-down list* and *Multi-select list* have additional settings. These settings configure the predefined set of options that a user can select from the list.

- You can add list options, rename them, change their display order, or remove them from the list.
- You can also manage list options in bulk with the export and import features.

### Add and Manage List Options Individually

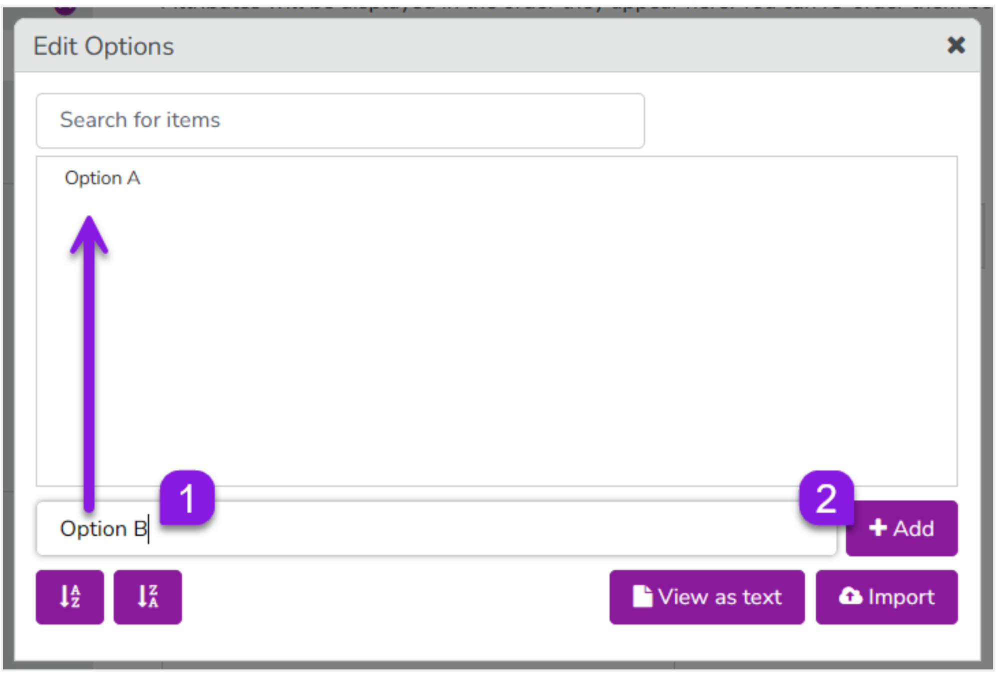
To add and manage list options for a *Drop-down list* or *Multi-select list* attribute, follow these steps:

1. When you create or edit a *Drop-down list* or *Multi-select list* attribute, click *Edit Options* in the *Attribute Details* panel:



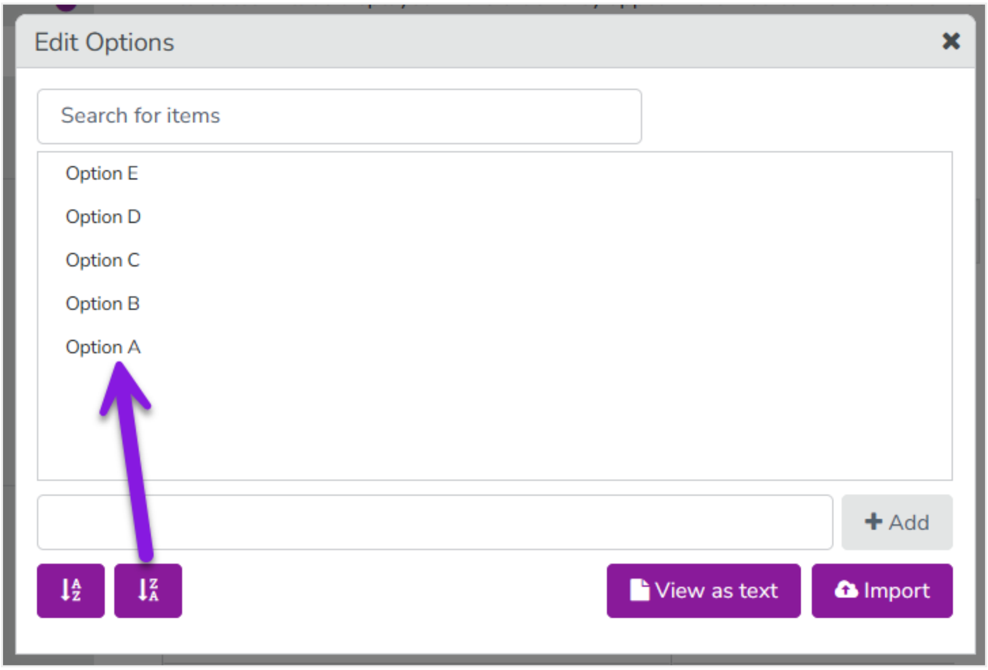

Note: For instructions on how to create or edit an attribute, see Creating an Attribute and Editing an Attribute.

2. In the *Edit Options* dialog that appears, type the name for an option into the text box and click *+ Add*. The option is added to the list of options:

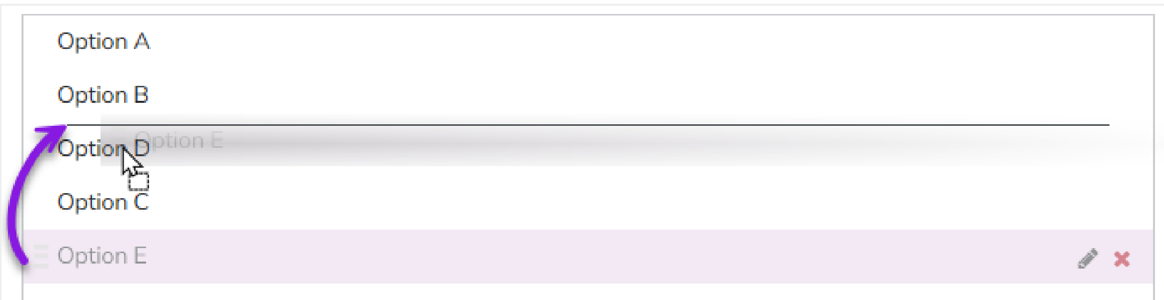



3. Repeat the previous step to add additional options.

4. To rename an option, hover on it and click Edit, then type the new name into the field. Click anywhere outside the field to save the new name.
5. To remove an option, hover on it and click Delete. The option is removed immediately.
6. To change the alphabetical sort order of the options, click *Sort A-Z* or *Sort Z-A*:




7. To manually set the sort order of the options, click-and-drag the handle beside the name of an option you want to move. Drop the option where you want to place it (a horizontal line shows where in the order the option will be placed):




8. When you have finished configuring the list options, close the *Edit Options* dialog. Your changes are saved automatically, and will take effect immediately.

You have successfully added and managed list options for a *Drop-down list* or *Multi-select list attribute.*

### Add List Options In Bulk With Import

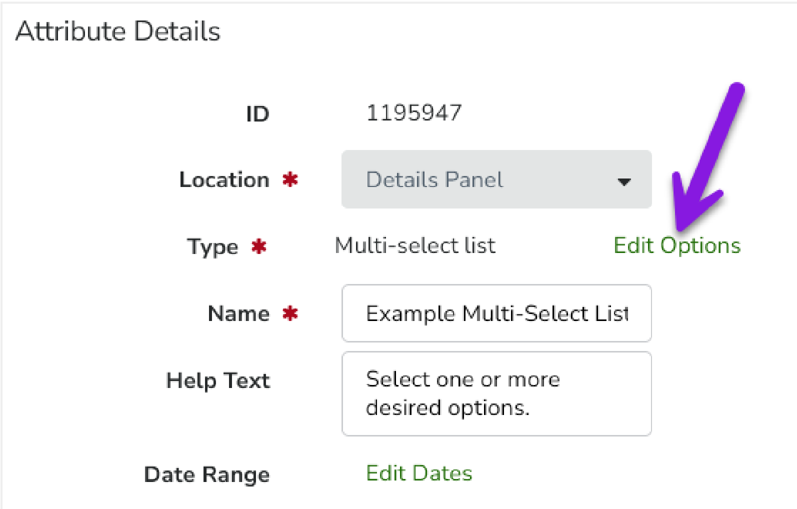
You can also import list options to create them in bulk (rather than individually). The import feature is designed to be used together with the export feature, which lets you copy an existing list of options from any list-type attribute.

To add list options in bulk using the export and import features, follow these steps:

1. Open the *Attribute Details* panel for the existing *Drop-down list* or *Multi-select list* attribute from which you want to export (copy) the list options.

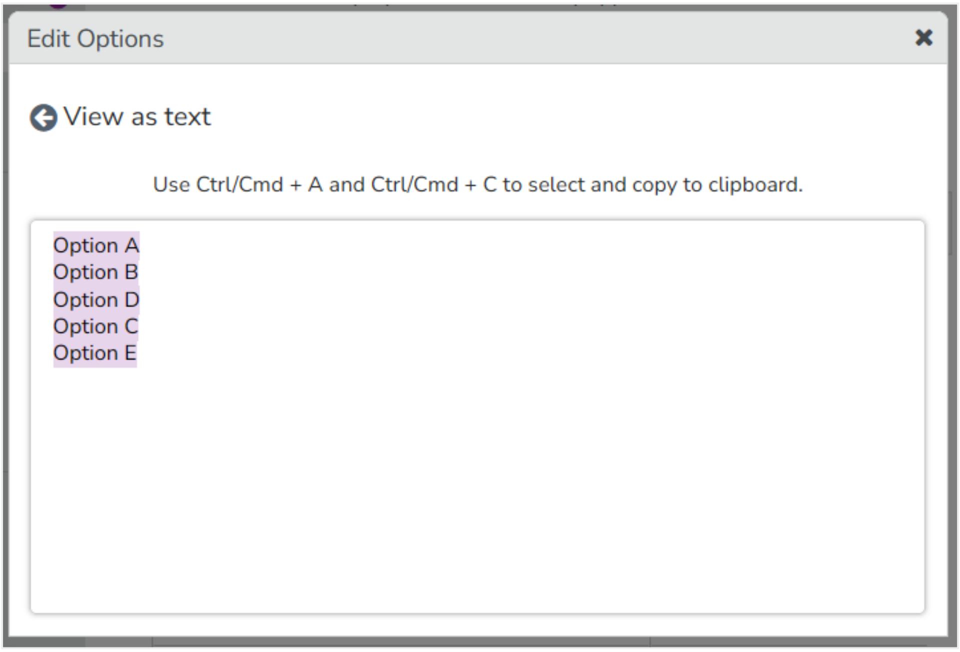
   Note: For instructions on how to open the *Attribute Details* panel for an existing attribute, see Editing an Attribute.

2. Click *Edit Options*:

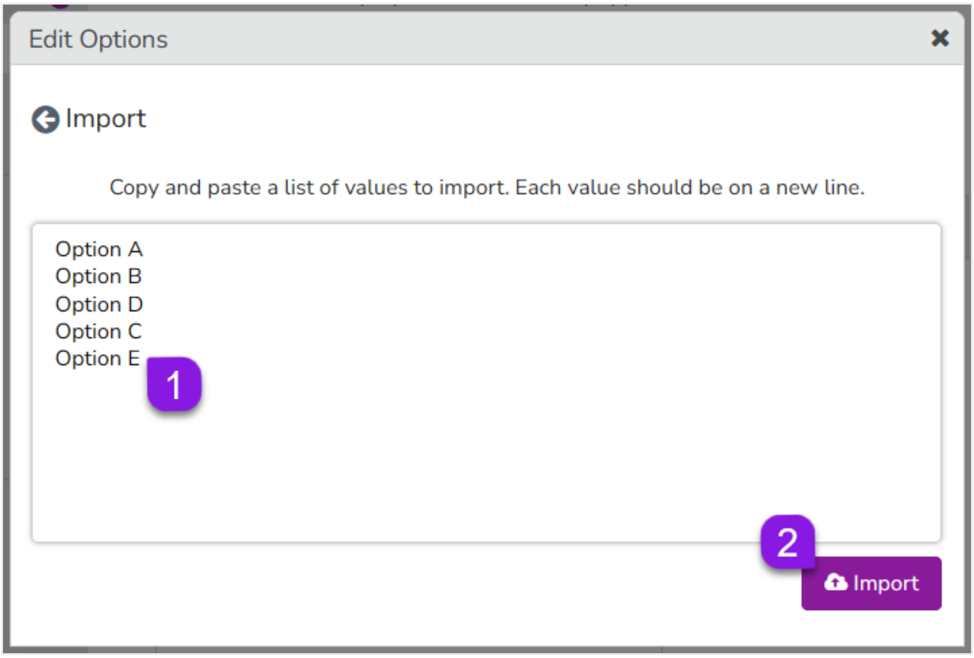
   
   

3. In the *Edit Options* dialog that appears, click *View as text.* The *View as text* dialog appears.

4. The current list options for the attribute are displayed in plain text, with each option on a separate line. Select all of the options and copy them to the clipboard.




5. Close the *Edit Options* dialog.
6. In the list of attributes, find the *Drop-down list* or *Multi-select list* attribute to which you want to import the list options you just copied. Open its *Attribute Details* panel, then click *Edit Options*.
7. In the *Edit Options* dialog that appears, click *Import.* The *Import* dialog appears.
8. Click into the text field and paste in the values you copied from the other attribute, then click *Import*. The *Import* dialog closes, and you are returned to the *Edit Options* dialog.




9. In the Edit Options dialog, the imported list options now appear in the list of options configured for the attribute. You can now make any changes to the options as needed, such as changing the order or renaming options.

   Note: If the attribute already had existing list options before the import, the new list options will be added to the end of the list.

10. When you have finished configuring the list options, close the *Edit Options* dialog. Your changes are saved automatically, and will take effect immediately.

You have successfully added list options in bulk using the export and import features.

> Note:
>
> You can also use the import feature by itself to manually create multiple list options quickly. To do this, skip the export step and go directly to the target attribute. Instead of pasting the list options you want to add into the *Import* field, just type them into the field directly (make sure to put each list option on a separate line).

### 6.1.3.2.3 Percentage Allocation

The attribute type *Multi-select list* has an additional setting to enable the percentage allocation feature. When this feature is enabled for a *Multi-select list* attribute, users can specify a percentage value for each of the options that they select from the list. You can use the percentage allocation feature for attributes where you want to record the relative weighting or contribution of each selection.

EXAMPLE

Some example use cases for setting percentage values on multi-select attributes:

- Quantify how much each selection contributes to an overall objective or target, e.g. how much a tactic contributes to different funnel stages
- Specify how the overall value or quantity that the attribute represents should be split up between the selections, e.g. how to split up the total time spent between various actions

###### 6.1.3.2.3.1 Functionality Notes

- When percentage allocation is enabled for a *Multi-select list* attribute, the system initially sets the percentage values automatically:
  - As the user adds selections, the system calculates and adjusts the percentage value of each selection to maintain an equal distribution.
  - For example, if there are four selections, each will be automatically assigned a value of 25% (1/4 of 100%).
- After making all selections, users can manually enter percentage values for each selection as needed:
  - The sum of all specified percentage values must always total exactly 100%.
  - If the sum of the percentage values totals more or less than 100%, the system will display an error message. Any changes to the selections or their percentage values will not be saved until the user adjusts the percentage values to total exactly 100%.
  - Users can enter percentage values as decimals, and can specify as many decimal places as they want. Decimal places are also taken into account for the requirement that all percentage values must total 100%: if a decimal percentage value is specified for one selection, at least one other selection must also have a decimal percentage value with the same number of decimal places to sum to a whole number.
  - Users can enter a value of 0% for any selection, including for multiple selections (provided the values of all selections still totals 100%).

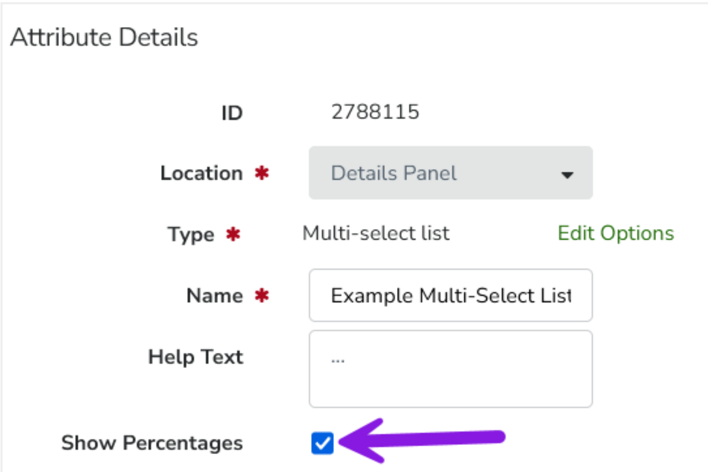
- After they are set, the percentage values are displayed beside the label of each selection wherever the attribute field is displayed (e.g. in an activity's *Details Panel*, or in *Analytics* and *BI exports*, etc.).
- The percentage values for attribute selections can also be used by the *Impact Modeler* feature. For details, see Impact Modeler.

### Enable or Disable Percentage Allocation on a *Multi-Select List* Attribute

You can turn the percentage allocation feature on or off for any new or existing attribute with the type *Multi-select list*.

To enable or disable the percentage allocation feature on an attribute, follow these steps:

- When you create or edit a *Multi-select list* attribute (see Creating an Attribute and Editing an Attribute):
  - To turn percentage allocation **on**, select the *Show Percentages* checkbox in the *Attribute Details* panel
  - To turn percentage allocation **off**, clear the Show Percentages checkbox in the *Attribute Details* panel




> **Note:**
>
> If you turn off the percentage allocation feature for an attribute on which percentage values have already been set, this will **not** delete the percentage values. Instead, the percentage values will be hidden, and you can restore them at any time by re-enabling percentage allocation for the attribute.

### 6.1.4 Deleting an Attribute

Attention! Data Loss!

Deleting an attribute cannot be reverted.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.
3. Click *Attribute Definitions* in the menu on the left side.

   The *Attribute Definitions* page with a table of all existing attributes is displayed.
4. Search the attribute you want to delete: On the top of the page, enter name or type in the *Search* field.

   The results of the search are displayed in the table.
5. Select the attribute you want to delete.
6. Above the table, click *Delete*.

   A security prompt is displayed.
7. Click *Yes*.

You have deleted the attribute.

### 6.1.5 Simplifying Data Entry

Users may have to select values from several or extensive lists when creating the activities. If these lists are logically related, you as an administrator can set up a dependency.

You can define dependencies between two single- or multi-select attributes by specifying one as a controlling attribute and another as a dependent attribute. For each controlling attribute value, the customer can define which dependent values are valid.



EXAMPLE

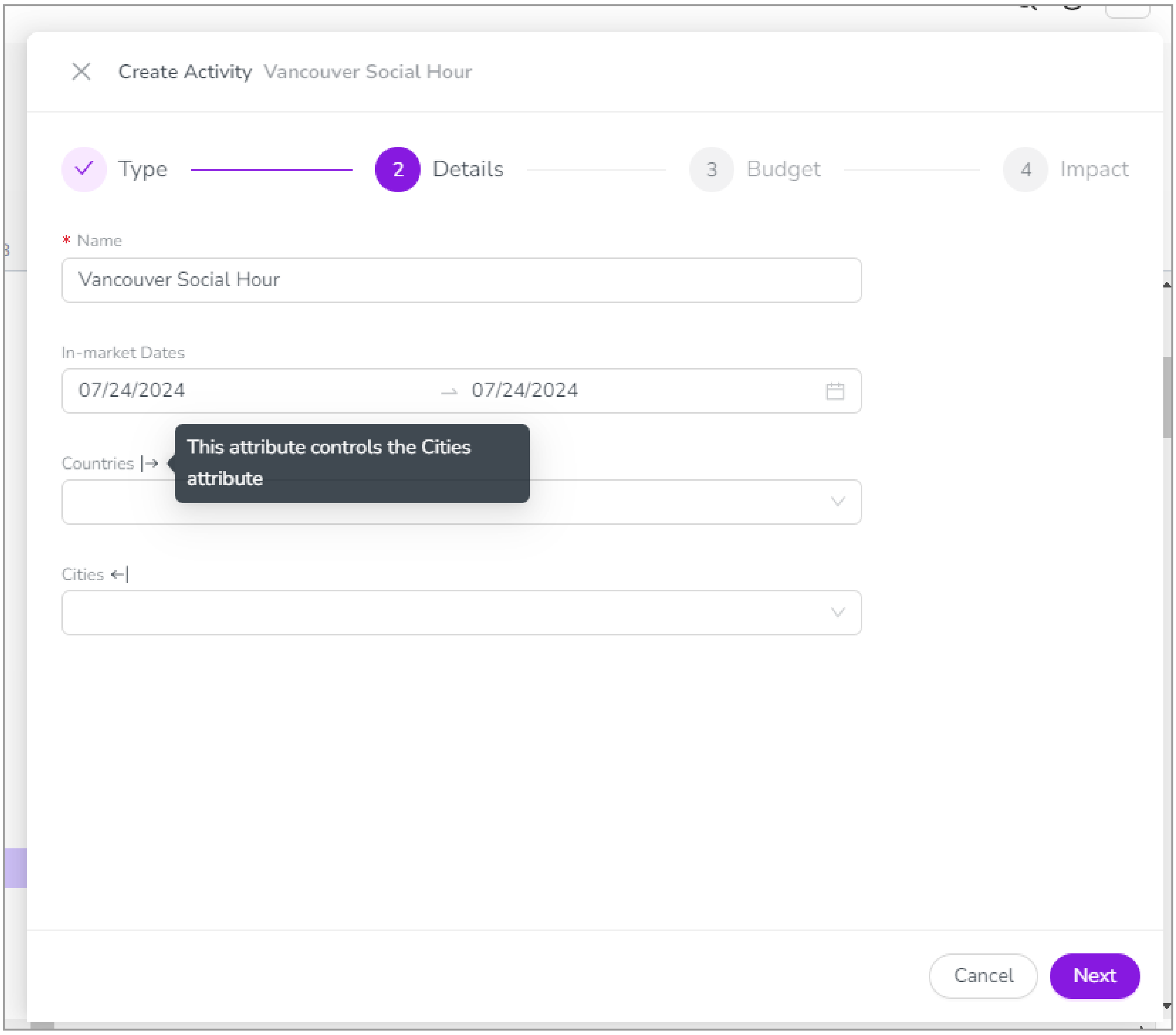
For a specific activity type, you must specify the branches in which the activity is to be executed. As your company has several branches in several countries, it is worth setting up two lists with a dependency. The first list contains the countries in which your company has branches. The second list contains all branches. You use the dependency to define the connection between country and branches. When editing the attributes, users first select the country. Then only the branches of the country are displayed in the second list.

## User Impact

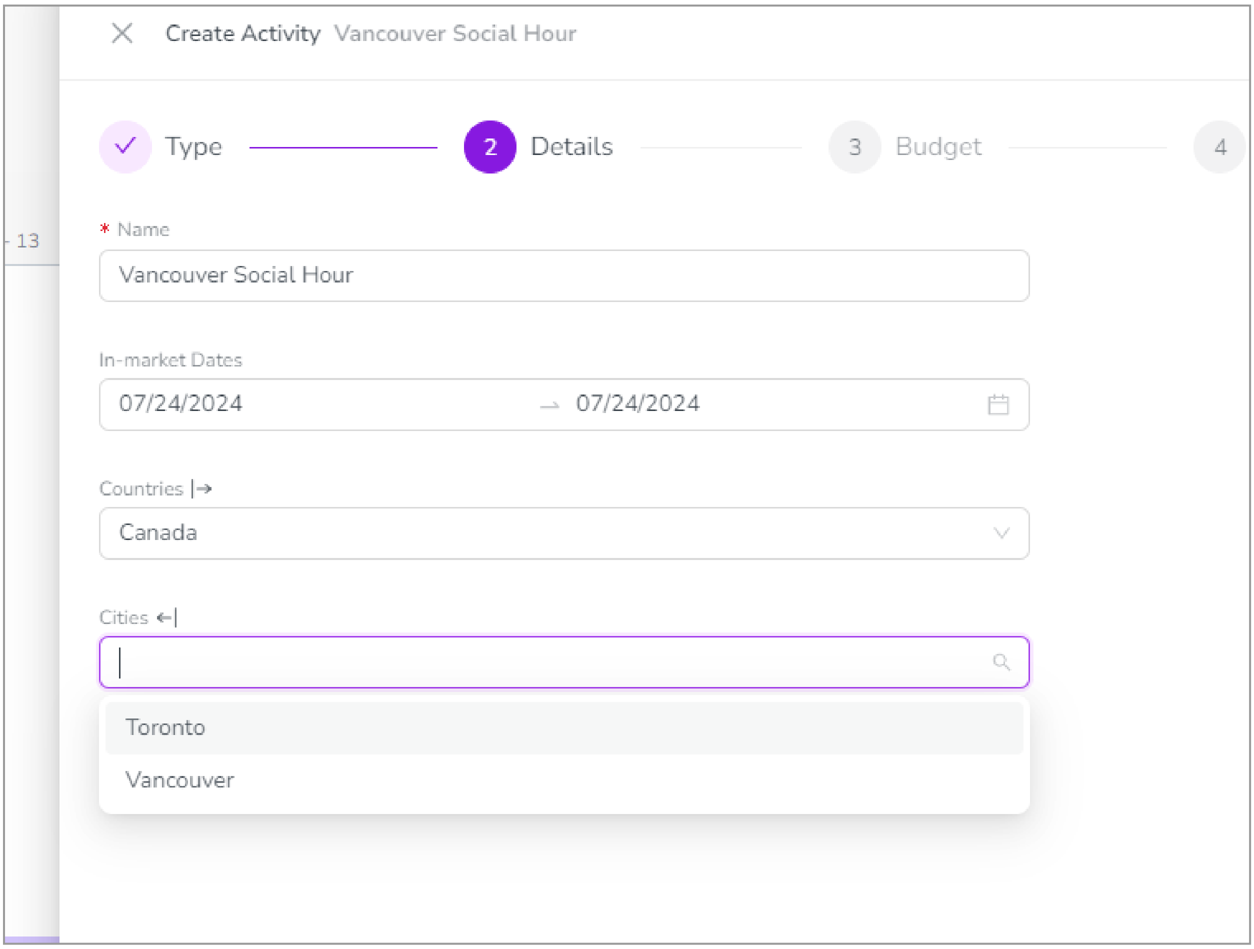
When you create an activity which has both the controlling and dependent attributes specified on the activity type, you will see an icon for each attribute which is part of an active dependency with popover text describing its relationship to the other attribute.






The options that the user can select in the dependent attribute are controlled by the value of the controlling attribute.



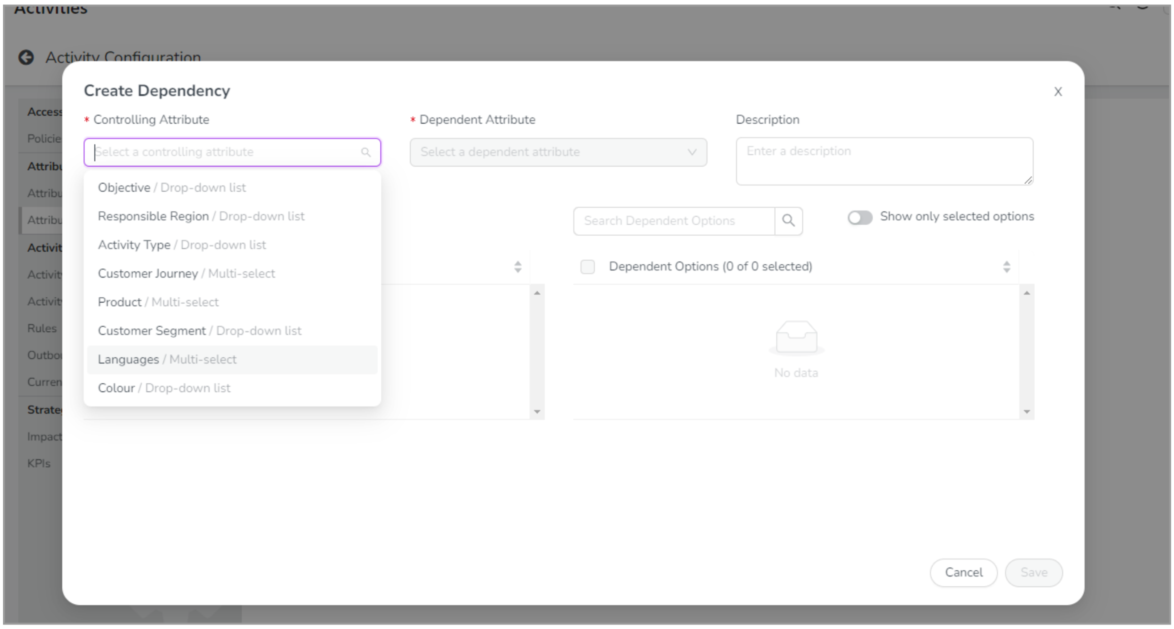

If no option is selected for the controlling attribute, then no options are valid for the dependent attribute. If the controlling attribute is a multi-select field, the available dependent options will be the combination of the valid options for each selected controlling option.

> Note
>
> Currently, the dependent attribute must always be edited, even if only one option is valid. In addition, the dependent attribute is always displayed, even if no valid options are available for selection.

## How To Set Up

*Prerequisite:* Controlling and dependent attributes must be assigned together to at least one activity type or activity type group.

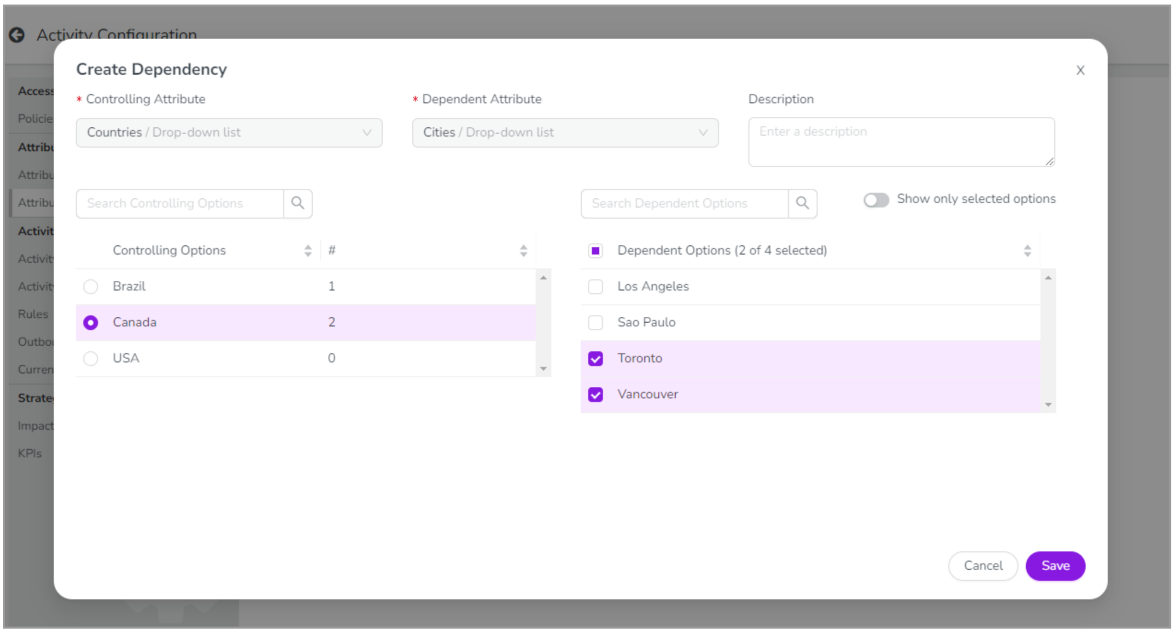
1. Click > *Activities* > *Settings* > *Attribute Dependencies*.
2. Click *Create Dependency* in the lower right corner.
3. In the *Controlling Attribute* list, select the attribute that controls the second list.




4. In the *Dependent Attribute* list, select the controlled list.
5. Optional: Enter a short and concise description.
6. Specify for each controlling attribute option which dependent options are valid. Some, all, or none of the dependent options can be selected for each controlling option.






7. Click *Save*.

You have set-up a dependency.

## Rules for Dependency Set-up

Note the following rules for the set-up of attribute dependencies:

- No split: It is not possible to set a controlling attribute on a higher- or lower-level activity type than the dependent attribute.
- No chains: Dependencies cannot be chained. A dependent attribute cannot be the controlling attribute in another dependency.
- No restriction of the dependency to only one activity type: In case the attributes are used for several activity types, you cannot restrict the dependency to only one or a selection of the activity types. Once set up the dependency is valid for all activity types to which both attributes are assigned.
- No required dependent attribute: A dependent attribute cannot be set as a required attribute and vice versa. A controlling attribute can be configured so that no dependent attribute options are valid, and therefore, the dependent attribute would be empty. But a required attribute cannot be empty.

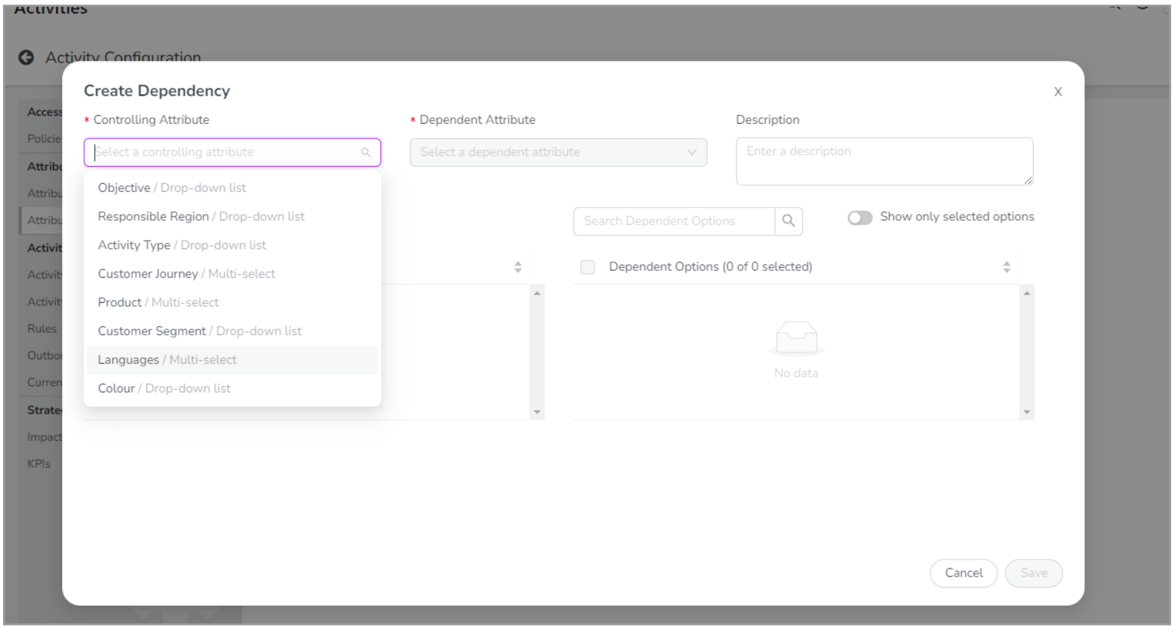
### Related Actions

- *Create a Dependency* below
- *Edit a Dependency* on the facing page
- *Delete a Dependency* on page 128

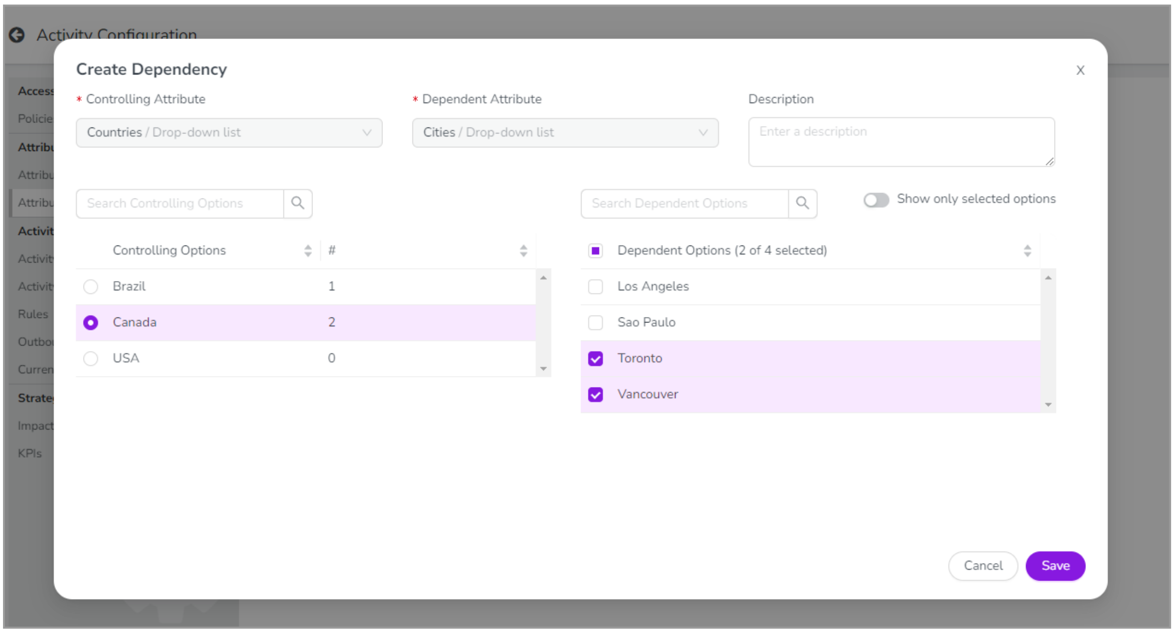
#### 6.1.5.1 Create a Dependency

*Prerequisite:* Controlling and dependent attributes must be assigned together to at least one activity type or activity type group.

1. Click > *Activities* > *Settings* > *Attribute Dependencies*.
2. Click *Create Dependency* in the lower right corner.
3. In the *Controlling Attribute* list, select the attribute that controls the second list.




4. In the *Dependent Attribute* list, select the controlled list.
5. Optional: Enter a short and concise description.
6. Specify for each controlling attribute option which dependent options are valid. Some, all, or none of the dependent options can be selected for each controlling option.

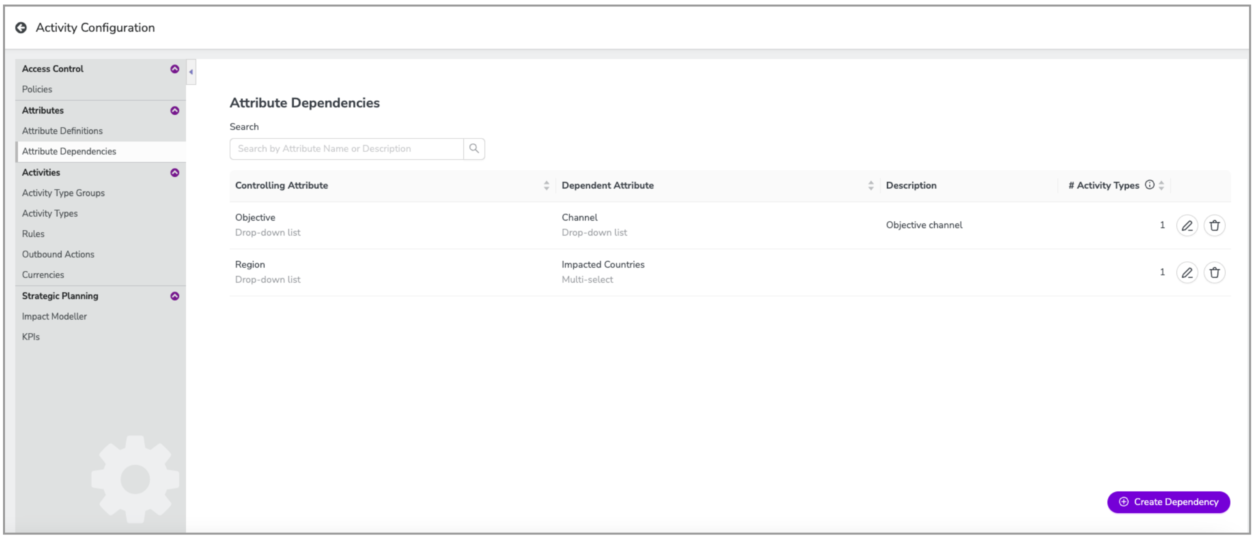



7. Click *Save*.

You have set-up a dependency.

### 6.1.5.2 Edit a Dependency

1. Click > *Activities* > *Settings* > *Attribute Dependencies*.
2. If an extensive list of dependencies has been created, search for the dependencies you want to edit in the search field above the list. You can search dependencies using the names of the controlling and dependent attributes, as well as their descriptions.
3. For the dependency you want to edit, click the  icon.
4. The Dependency Editor opens. You cannot change the controlling and dependent attribute.
5. Optional: Edit the description.
6. Optional: Edit the assignment of valid dependent options to the controlling options. Some, all, or none of the dependent options can be selected for each controlling option.
7. Click *Save*.




You have edited a dependency.

#### 6.1.5.3 Delete a Dependency

> Attention! Data Loss!
>
> Deleting a dependency cannot be reverted.

1. Click > *Activities* > *Settings* > *Attribute Dependencies*.
2. If an extensive list of dependencies has been created, search for the dependencies you want to delete in the search field above the list. You can search dependencies using the names of the controlling and dependent attributes, as well as their descriptions.
3. For the dependency you want to delete, click the icon.

   A security prompt is displayed.
4. Click *Delete*.

The dependency is deleted.

### 6.1.6 Activity Attribute Grouping

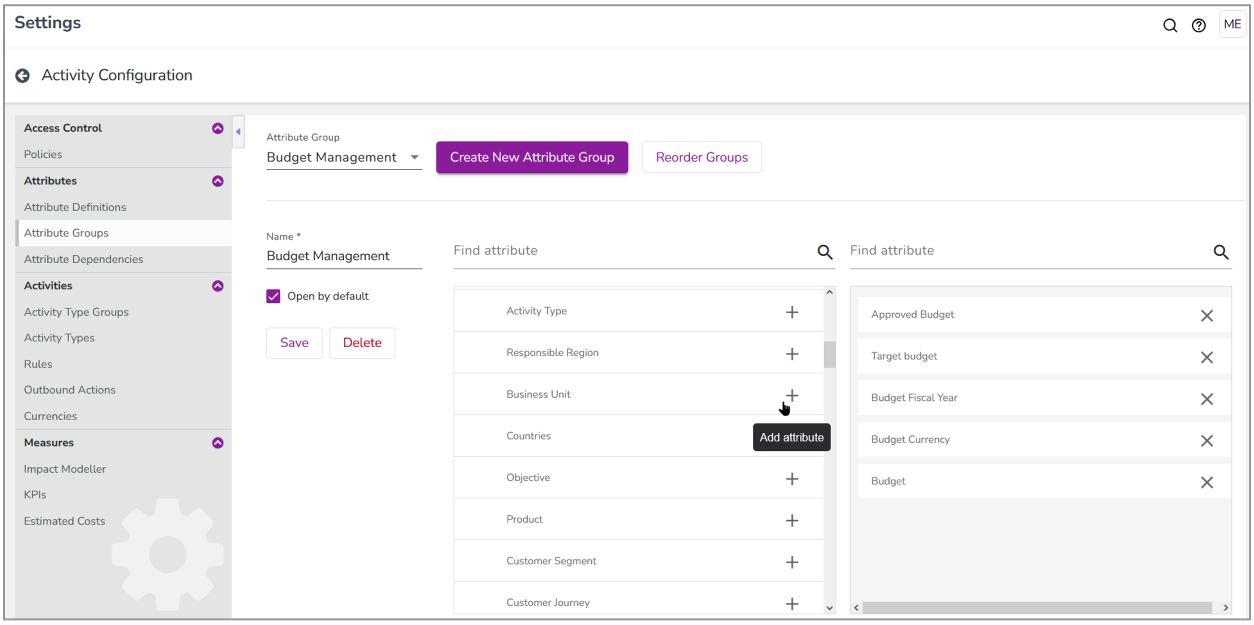
This feature allows administrators to organize global activity attributes into logical groups, making it easier for users to enter and view related information together in the Activity Details panel. For example, as an administrator, you could group all marketing channel-related attributes or all budget-related attributes to streamline the data entry and review process.

The activities *Details* panel is updated to display the grouped attributes either collapsed or expanded.

Administrators can configure attribute groups through the following steps:

1. Access *Settings > Activity Configuration > Attribute Groups*.
2. Click *Create New Attribute Group*.
3. Select the new but unnamed group from the *Attribute Group* menu.
4. Overwrite the default name *New Group 1* in the name field.
5. Optional: Select the *Open by default* check box to display this group in expanded mode when you open the *Details* panel.
6. Assign all attributes to the appropriate groups using the drag-and-drop interface.

   The *Find Attribute* search field is useful for filtering lengthy lists of attributes.
7. Optional. Click ╳ next to its name to remove an incorrect attribute.
8. Click *Save* to apply changes.
9. Optional: Click *Reorder Groups* to change the order how the groups are displayed in the *Details* panel.
10. Drag and drop to reorder attribute groups.
11. Click *Save* to confirm the new order.




You have grouped activity attributes and arranged the order of the groups.

**Note**

You cannot apply an attribute to multiple groups. If you try, you will see an error message which will help you to identify the affected attributes when you try to save.



# 6.2 Activities Types and Their Hierarchy Structure

This phase has the following goals:

- Create templates for activities, the so-called activity types.
- Define which data will be collected for which activities.
- Define the possible structure of the activity hierarchy

You do this in the following steps:

> Note
>
> In order for a user to create activities, you as an administrator must edit steps *2 Activity types* and *3 Rules*. Step 1 is functionally optional, but strongly recommended from our side, see *Activity Type Groups Are Optional, But...* on page 133.

### Step 1 Activity Type Groups

Most companies use many types of activities. You can probably group the activity types in your company based on similar characteristics. See *Activity Type Group* below.

### Step 2 Activity Types

When you define activity types, you create the templates with which users create the activities. In an activity type, you specify which attributes must be filled in for an activity and whether a workflow is associated with it. See *Activity Types* on page 139.

### Step 3: Rules

With rules you define how the hierarchy of activities is structured. This means, for example, which activity type or activity type group can be used as root element and how other activity types and activity type groups can be arranged below it. See *Rules* on page 151.

## 6.2.1 Activity Type Group

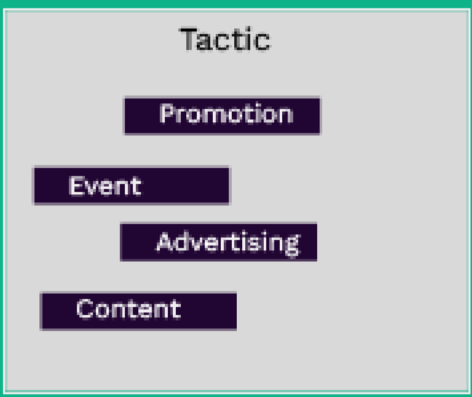
Most companies use many types of activities. You can probably group the activity types in your company based on similar characteristics.

EXAMPLE

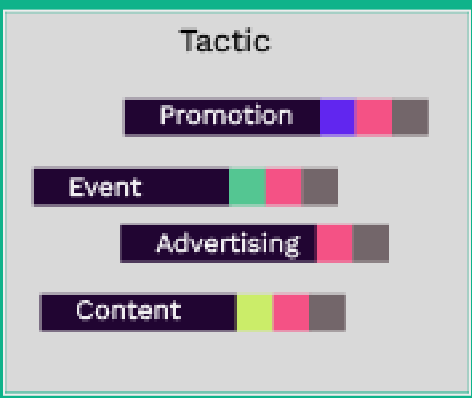
In your company, the following marketing activities are carried out repeatedly and in a standardized manner:

- Promotion
- Advertising
- Content
- Event

These activities are to be created as corresponding types. You will notice that these activity types are on a similar level in the hierarchy and that similar data must be recorded for the activities. Therefore, it makes sense to combine these activity types in an activity type group. In this case, let's name this group *Tactic*:



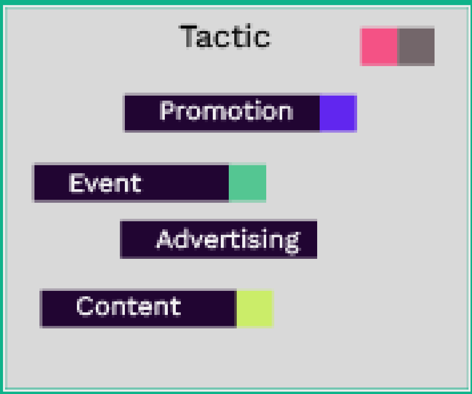

According to your concept, you want to capture type data for each activity, represented by the colored squares in the following image:





You may determine that identical attributes are to be recorded for the activity types. For easy and consistent attribute management, you can assign these attributes to the activity type group:

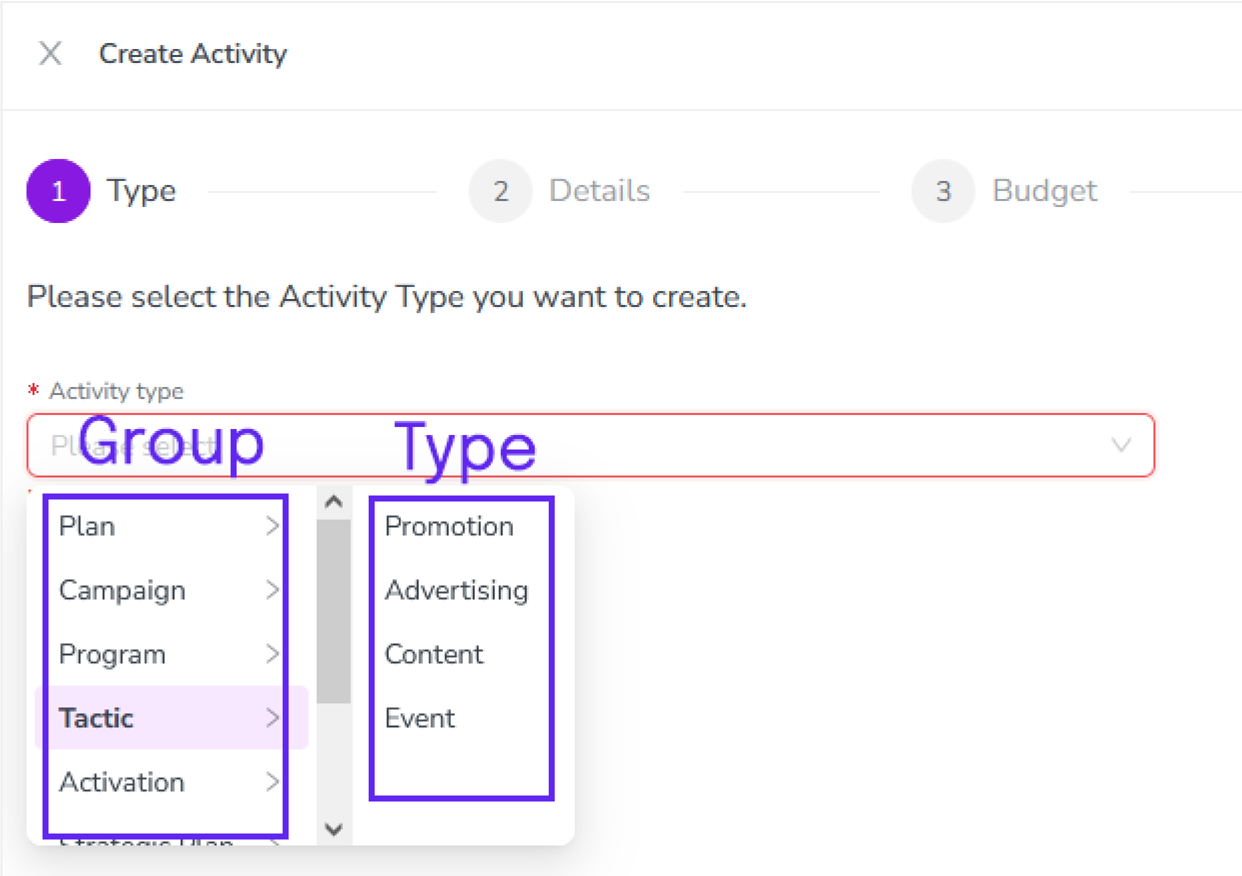



This has the following consequence:

When a user creates an activity based on one of the types in this group, the activity gets the attributes of the group and the type.

## Activity Type Groups Are Optional, But...

You do not need to group your activity types. However, note that this will affect how users create the activities. The following screenshot shows step 1 of the activity creation wizard, where the user selects the activity types. In the first column, the user first selects the group, then selects a type of the group:




If you do not create activity type groups or if not all types are assigned to a group, these unassigned activities types are displayed in the left column. Depending on the number of activities, this can lead to a very long and therefore inconvenient selection of activity types.

> **Note**
>
> The assignment of activity types to groups is restricted once the type is in use. Even if an activity type is not initially assigned to a group, this cannot be changed once an activity based on this type is created.

In summary, we would like to recommend that you divide your activities into at least a basic set of activity type groups from the beginning. Make sure that this set is expandable for you in the future.

## Disabling or Deleting?

As an administrator, you have the ability to both disable and delete activity type groups. When should you use which function?

- Disabling activity type groups: Disable an activity type group if you do not want to expand the group further. If you disable an activity type group, you can no longer assign activity types to the group. However, as long as the assigned activity types are enabled, users can continue to use these activity types to create new activities.
- Deleting activity type groups: An activity type group can be deleted only if none of the assigned activity types is in usage. If deleting an activity type group cannot be avoided, all existing activities based on the activity types assigned to the group must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the activity type group instead.

## Related Actions

- *Creating an Activity Type Group* below
- *Editing an Activity Type Group* on the next page
- *Disabling an Activity Type Group* on page 138
- *Deleting an Activity Type Group* on page 138

### 6.2.1.1 Creating an Activity Type Group

## Prerequisites

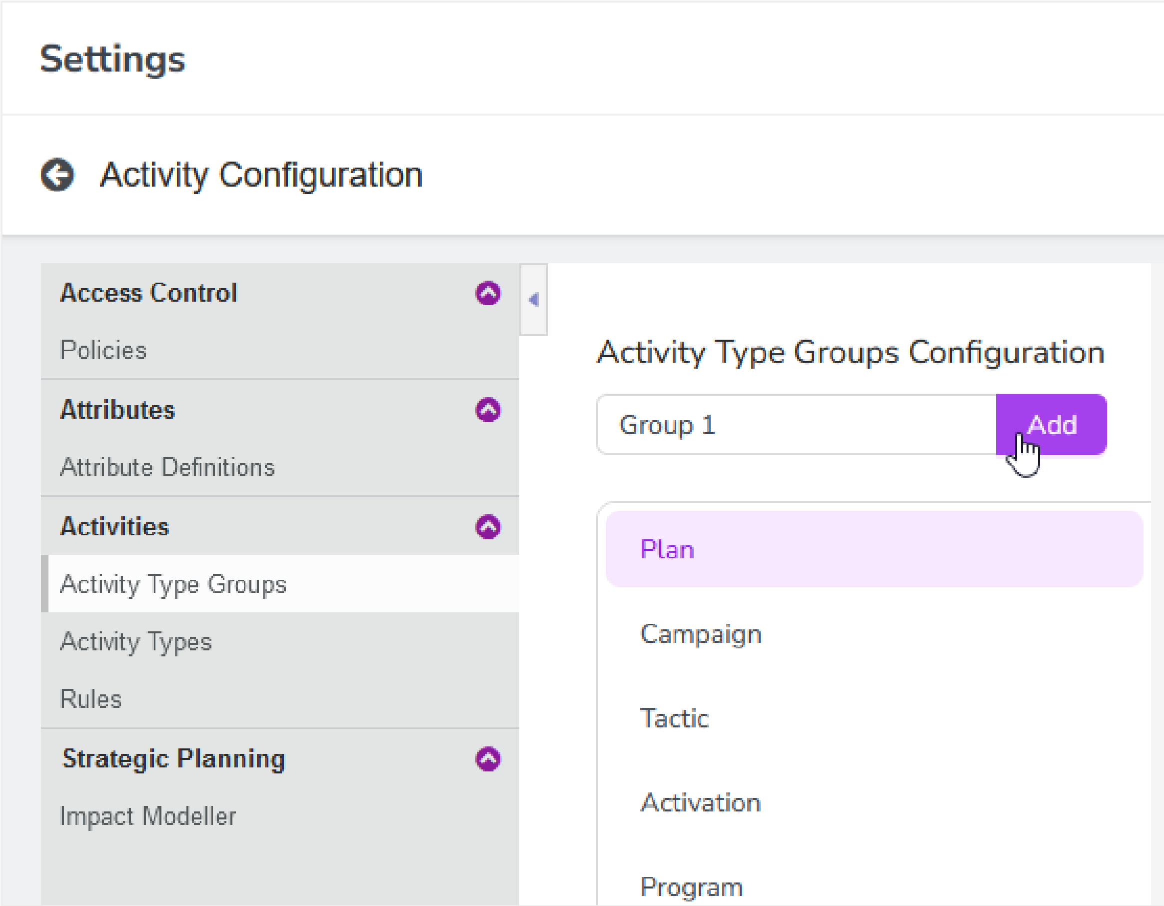
To be able to create an activity type group, the following objects must be created beforehand:

- All needed attributes

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.
3. Click *Activity Type Groups* in the menu on the left side.

   The *Activity Types Groups Configuration* page is displayed.
4. In top-left corner of the page, enter the name of the new group and click *Add*. Note that the name must be unique among all activity type groups.




In the *Details* section on the right side, a list of attributes is displayed.

5. In the list, select the attributes that user should edit for this type of activities. Activate the checkbox in the left column to include, deselect the checkbox to exclude. Included attributes will be inherited by the activity types assigned to the group.
6. Decide which attributes are mandatory to edit: Activate the according checkboxes in the *Required* column on the right side.
7. Click *Save changes*.

You have created an activity type group.

#### 6.2.1.2 Editing an Activity Type Group

When you edit an activity type group, you can edit the name, assign attributes to the group, remove the assignment of attributes and mark attributes as required.

Note the following cases:

- *Assigning an attribute and marking it as required*: If you assign an attribute to an activity type group, the attribute is initially optional. You can also mark a subsequently assigned attribute as required. To do this, first assign a value in the attribute for each activity of this group. Then edit the activity type group again and mark the attribute as required.
- *Removing an attribute*: In case you remove an attribute from an activity type group and data is set in the attribute for activities, then the data will be permanently deleted. Restoring the data is not possible.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.
3. Click *Activity Type Groups* in the menu on the left side.

   The *Activity Type Groups Configuration* page is displayed.
4. On the left side of the page, select the type you want to edit.

   In the *Details* section on the right side, the properties of the type are displayed.
5. Edit the properties as needed:
   a. Edit the name.
   b. Change the attributes that user should edit for this type of activities. Activate the check-box in the left column to include, deselect the checkbox to exclude. Included attributes will be inherited by the activity types assigned to the group.
   c. Decide which attributes are mandatory to edit: Activate the according checkboxes in the *Required* column on the right side.
6. Click *Save changes*.

You have edited the activity type group.

#### 6.2.1.3 Disabling an Activity Type Group

Note

When an activity type group is disabled, activity types cannot be assigned to the group.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.
3. Click *Activity Type Groups* in the menu on the left side.

   The *Activity Types Groups Configuration* page is displayed.
4. On the left side of the page, select the group you want to disable.

   In the *Details* section on the right side, the properties of the group are displayed.
5. Click *Disable Activity Type Group* at the bottom right of the page.

You have disabled the activity type group.

#### 6.2.1.4 Deleting an Activity Type Group

Attention! Data Loss!

Deleting an activity type group cannot be reverted.

Note

An activity type group can be deleted only if none of the assigned activity types is in usage. If deleting an activity type group cannot be avoided, all existing activities based on the activity types assigned to the group must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the activity type group instead.

See *Disabling an Activity Type Group above*.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.

3. Click *Activity Type Groups* in the menu on the left side.

   The *Activity Types Groups Configuration* page is displayed.

4. On the left side of the page, select the group you want to delete.

   In the *Details* section on the right side, the properties of the group are displayed.

5. Click *Delete Activity Type Group* at the bottom right of the page.

You have deleted the activity type group.

## 6.2.2 Activity Types

When you define activity types, you create the templates with which users create the activities. In an activity type, you specify which attributes must be filled in for an activity and whether a workflow is associated with it.

### What Is a Workflow?

If similar processes are carried out repeatedly in your company, involving colleagues from different departments, you can map these processes in so-called workflows. Maybe the processes are related to your activities. Examples are the creation of assets (e.g. ads for a digital campaign) or the approval process of a campaign planning. Within Uptempo, workflows are managed in the Job module.

If this is the case for your activities, you can directly link the corresponding activity type to a workflow type. The workflow and the activity that are linked in this way can exchange data. The workflow type represents the standardized process and its data and is—like an activity type—a template.
Each workflow type contains so-called variables, which offer different editing options for the job. For example, a variable can allow assets to be attached to the job or data to be entered.

To associate an activity type with a workflow type, you must consider the following points:

- Before you can link the activity type to a workflow type, the workflow type must have been created. How to create a workflow, you learn in Job Manager Administration Manual.
- Each variable included in a workflow has a technical name. To link the workflow type to an activity type you need the technical names of the variables that should be linked to attributes. See *How to Find Out Technical Name of a Variable* on the next page.
- You need to create a clear concept of where data is collected and where it can only be displayed. Data can be entered only on one side and displayed to the other side only synchron-

ized. When creating the link between activity type and workflow type, you must specify whether the data will be entered in the activity or in the workflow.

## Do Activities of the Type Drive Demand Generation?

Activities that are not meant for demand generation or in other words do not fill in the top of the marketing funnel do not need impact modeling. To reduce number of clicks when creating or viewing activities you as an administrator can hide the *Impact* tab for the activity types that don't need impact modeling. By default, impact modeling is activated for an activity type.

You switch impact modeling on or off when creating or editing an activity type, see *Creating an Activity Type* on page 142 and *Editing an Activity Type* on page 147

## Disabling or Deleting?

As an administrator, you have the ability to both disable and delete activity types. When should you use which function?

- Disabling activity type: Disable an activity type if user shouldn't use the type anymore. If you disable an activity type, users cannot create activities basing on the type.
- Deleting activity type: An activity type can be deleted only if no activity exists that bases on the type. If deleting an activity type cannot be avoided, all existing activities basing on the type must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the activity instead.

## Related Actions


- *Creating an Activity Type* on page 142
- *Editing an Activity Type* on page 147
- *Disabling an Activity Type* on page 149
- *Deleting an Activity Type* on page 149


### 6.2.2.1 How to Find Out Technical Name of a Variable

1. In Side navigation, click > *Work Management* > *Administration* > *Overview*.
2. On the left side of the *Overview* page, click > *Datasheet Engine* > *Types*.
3. Search the type you want to link.



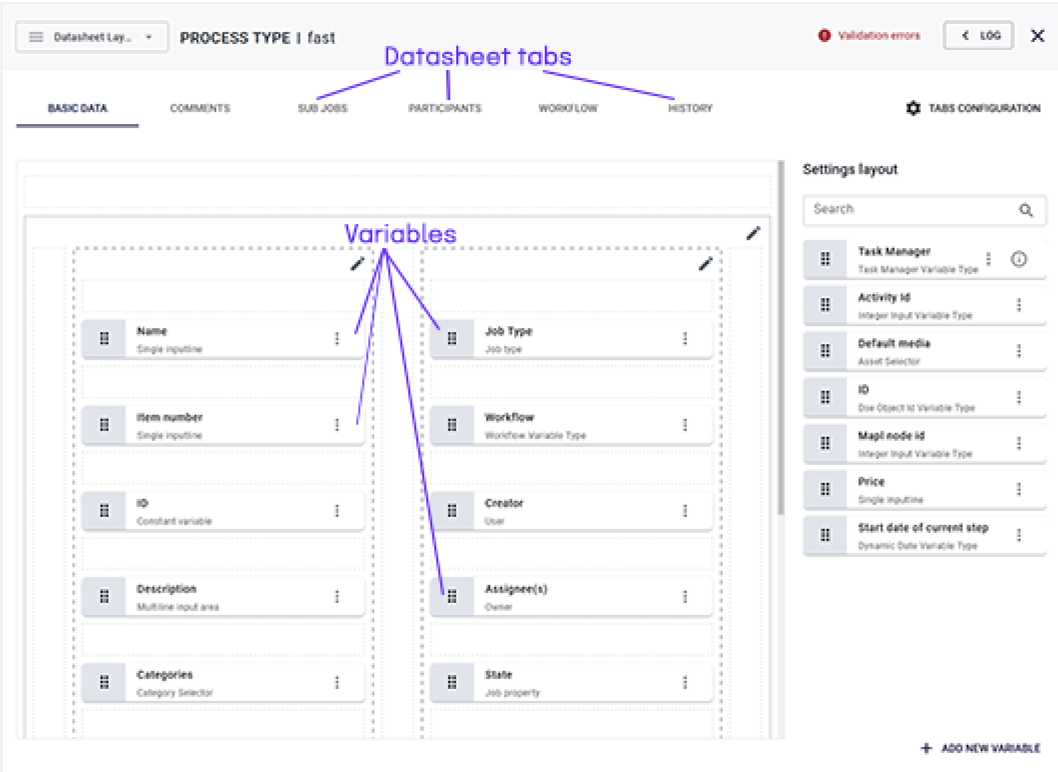
 

4. Inline with the type you want to link, click the pencil icon on the right side of the row. You can only link *Process* types, see *Type* column.

   The process type's settings are displayed.

5. In the dropdown in the top left corner, select *Datasheet Layout*.

   The datasheet layout for the type is displayed. The layout displays the datasheet tabs and the variables on the tabs. The following screenshot shows an example:




6. For each variable you want link, click > ⋮ > *Edit*.

   The settings of the variables are displayed, including the *Technical Name* attribute.

7. Make a note of the exact technical name of the variable.

8. Repeat step 6 and 7 for every variable you want to link to an attribute of an activity type.

You have the list of the technical names for the variables you want to link. You can now create the activity type, see *Creating an Activity Type* on the next page.

### 6.2.2.2 Creating an Activity Type

#### 6.2.2.2.1 Prerequisites

Before you can create an activity type, you must:

- Create all attributes that you want to use with the activity type. For instructions, see *Creating an Attribute* on page 105.
- Optionally, create the activity type group that the activity type should belong to. For instructions, see *Creating an Activity Type Group* on page 135.
- Optionally, the workflow type that the activity should be connected to (including all workflow variables). For more information, see Workflows.

#### 6.2.2.2.2 Create an Activity Type

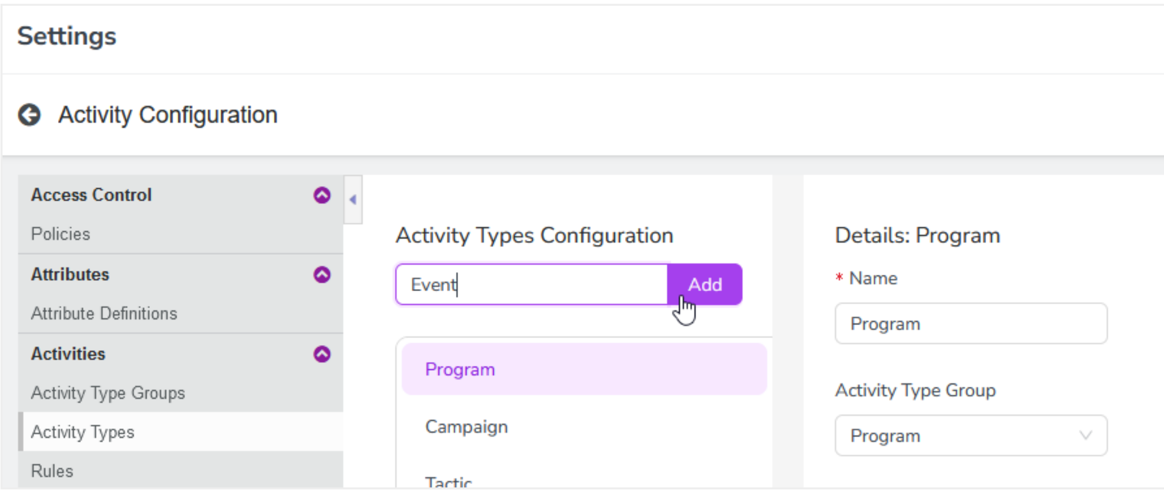
To create a new activity type, follow these steps:

1. In Uptempo, click *Activities*.
2. In the *Activities* section, click *Settings*.

   The settings for activity configuration are displayed.
3. Click *Activity Types* in the settings menu.

   The *Activity Types Configuration* page is displayed.
4. Enter the name of the new activity type into the *New name* field and click *Add*.

   Note: Activity type names must be unique.





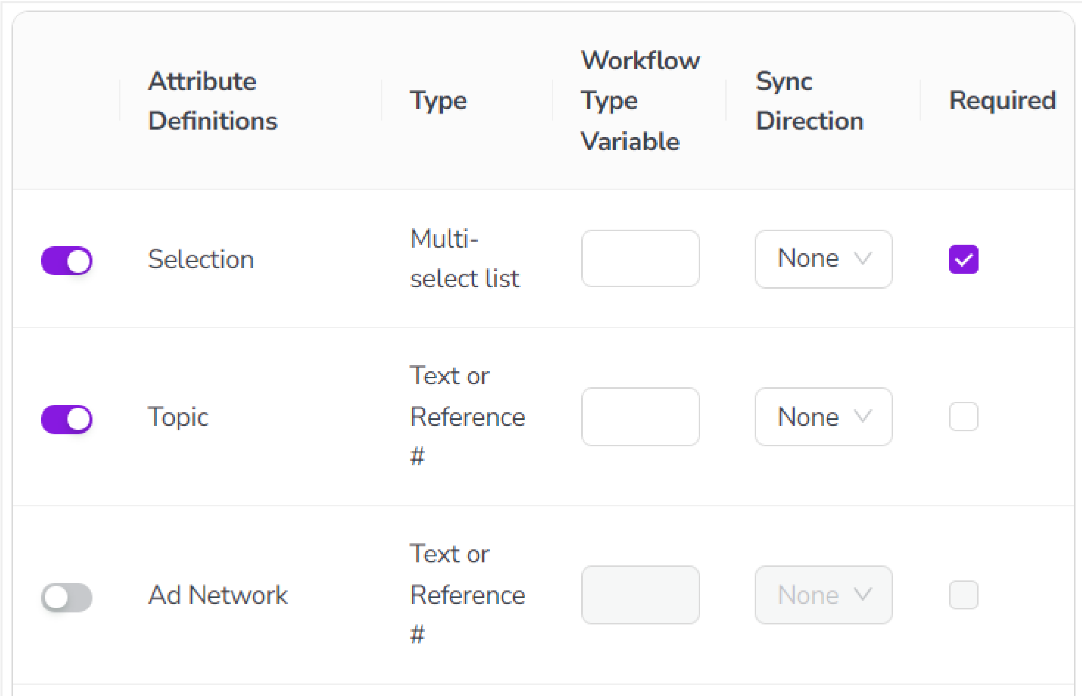
In the *Details* section on the right side, the settings for the new activity type are displayed.

5. Optional: If needed, use the settings to configure the options for the new activity type. For more details on the available options, see *Configure Activity Type Options* on the next page.
6. Use the attributes table to select the attributes for this activity type. Users will be able to set values for the attributes you specify here when creating activities of this type.
   - To enable any available attribute for this activity type, click its toggle to turn it on.

     > Note:
     >
     > If you have assigned this activity type of an activity type group, some of the attributes will already be enabled, and their toggles can't be turned off. These attributes are set as enabled on the parent activity type group, which means that they must be included on all activity types within the group, and can't be removed.

   - Optional: If you have connected this activity type to a workflow type, you can also configure additional workflow-specific options for each attribute. For more details on how to configure these options, see Configure Workflow-Specific Attribute Settings.
   - Optional: To require that users must select a value for an enabled attribute when creat-

ing an activity of this type, select the *Required* checkbox for that attribute.




7. When you have finished configuring the new activity type, click *Save Changes*.

You have successfully created a new activity type.

### 6.2.2.2.3 Configure Activity Type Options

When you create or edit an activity type, you can configure the following options:

#### 6.2.2.2.3.1 Activity Type Group

- **Function**: Used to assign the activity type to a parent *Activity Type Group* on page 131.
- **To configure**:
  - To assign the activity type to an activity type group, select the group you want from the list.
  - If you do not want to assign the activity type to a group, leave this field empty.

#### 6.2.2.2.3.2 In-market Dates

- **Function**: Sets whether the in-market dates fields are displayed on activities of this type, allowing users to specify the start and end dates for an activity's in-market period.
- **To configure**:
  - This setting is turned on by default. To display the in-market dates fields on activities of this type, leave *In-market Dates* toggle in the on position.
    - Optional: Select the *Required* checkbox to set the in-market dates fields as required (users must set a value).
  - To hide the in-market dates fields, click the *In-market Dates* toggle to set it to the off position.

#### 6.2.2.2.3.3 Impact Modelling

- **Function**: Sets whether the *Impact* tab is displayed on the *Details* panel for activities of this type, allowing users to enter funnel performance data for an activity. For more information, see *Impact Modeler* on page 168.
- **To configure**:
  - This setting is turned off by default. To display the *Impact* tab on activities of this type, click the *Impact Modelling* toggle to turn it on.
  - To hide the *Impact* tab, leave the *Impact Modelling* toggle in the off position.

#### 6.2.2.2.3.4 KPIs

- **Function**: Sets whether the *KPIs* tab is displayed on the *Details* panel for activities of this type, allowing users to enter KPI targets for an activity. For more information, see *KPIs* on page 97
- **To configure**:
  - This setting is turned off by default. To display the *KPIs* tab and set the KPIs that can be recorded on activities of this type, select the KPIs you want from the list.
    - You can select one or multiple KPIs.
    - The *KPIs* tab will be displayed if at least one KPI is selected.
  - If you do not want to display the *KPIs* tab, leave this field empty.

##### 6.2.2.2.3.5 Workflow Type

- **Function**: Used to connect the activity type to a workflow type to make activities of this type part of a set process. For more information, see *Planning Activities* on page 25 (Workflows).
- **To configure**:
  - This setting is turned off by default. To connect the activity type to a workflow type, select the workflow type you want from the list.
  - If you do not want to connect the activity type to a workflow type, leave this field empty.

#### 6.2.2.2.4 Configure Workflow-Specific Attribute Settings

If you have connected an activity type to a workflow type, you can also configure additional settings for each enabled attribute to define how this connection works. You can configure the following options:

##### 6.2.2.2.4.1 Workflow Type Variable

- **Function**: Used to specify the workflow variable that corresponds to the attribute, so that values can be synchronized between the activity attribute and the workflow variable.
- **To configure**: Enter the technical name of the workflow variable that you want to synchronize the attribute with. For instructions on how to find variable names, see *How to Find Out Technical Name of a Variable* on page 140.

##### 6.2.2.2.4.2 Sync Direction

- **Function**: If *Workflow Type Variable* is specified, defines how values will be synchronized between activity attributes and workflow variables by determining which value takes priority.
- **To configure**: Select the setting for the behavior you want to use:
  - *From Activity*: Any value set on the activity attribute will always be prioritized, and the value on the specified workflow variable will be updated to match it.
  - *From Workflow*: Any value set on the specified workflow variable will always be prioritized, and the value on the activity attribute will be updated to match it.
  - *None*: Values will never synchronize between the activity attribute and the specified workflow variable. This is the default setting.

#### 6.2.2.3 Editing an Activity Type

When you edit an activity type, you can edit the name, assign attributes to the group, remove the assignment of attributes, and mark attributes as required.

Note the following cases:

- *Assigning an attribute and marking it as required*: If you assign an attribute to an activity type, the attribute is initially optional. You can also mark a subsequently assigned attribute as required. To do this, first assign a value in the attribute for each activity of this type. Then edit the activity type again and mark the attribute as required.
- *Removing an attribute*: In case you remove an attribute from an activity type and data is set in the attribute for activities, then the data will be permanently deleted. Restoring the data is not possible.

> Note
>
> The following properties of an activity type can be edited only if no activity basing on the type exists:
>
> - Assigned workflow
> - Sync direction for synchronized attributes
> - Assigned activity type group
>
> If changing these properties cannot be avoided, all existing activities based on the activity type assigned to the group must first be deleted.
> It is possible to change the technical names of the job variables that are synchronized with the assigned attributes.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.
3. Click *Activity Types* in the menu on the left side.

   The *Activity Types Configuration* page is displayed.
4. On the left side of the page, select the type you want to edit.

   In the *Details* section on the right side, the properties of the type are displayed.

5. Edit the properties as needed:
   a. Edit the name.
   b. Edit the assigned activity type group.
   c. Decide whether the activity type needs impact modeling. Toggle the *Enable Impact Modelling* switch accordingly.

      Attention! If you deactivate impact modeling then impact data from existing activities of the type will be deleted when saving changes, see step 7.
   d. Change the attributes that user should edit for this type of activities. Activate the check-box in the left column to include, deselect the checkbox to exclude. Rows that are displayed in purple are inherited by the assigned group and cannot be changed.
   e. Decide which attributes are mandatory to edit: Activate the according checkboxes in the *Required* column on the right side.
   f. Edit the assigned workflow type.
   g. For attributes that are to be synchronized between workflow and activity: In the *Workflow Type Variable* column, edit the technical names of the variables in the workflow type. For more information, see *How to Find Out Technical Name of a Variable* on page 140.
   h. In the *Sync Direction* column, edit whether the value is maintained in the workflow or in the activity and synchronized to the other object accordingly.
6. Click *Save changes*.

   In case you deactivate impact modeling for the type and impact data is stored for existing activities of this type, then a warning is displayed.
7. In case the warning is displayed, decide:
   - If it is OK to lose the data, click *Save Changes*.
   - If you don't want to lose the data, click *Cancel*. Activate impact modeling and click *Save Changes* again.

You have edited the activity type.

#### 6.2.2.4 Disabling an Activity Type

> Note
>
> When an activity type is disabled, activities basing on the type cannot be created. Existing activities basing on the type are not affected.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.
3. Click *Activity Type* in the menu on the left side.

   The *Activity Types Configuration* page is displayed.
4. On the left side of the page, select the type you want to disable.

   In the *Details* section on the right side, the properties of the type are displayed.
5. Click *Disable Activity Type* at the bottom right of the page.

You have disabled the activity type.

#### 6.2.2.5 Deleting an Activity Type

> Attention! Data Loss!
>
> Deleting an activity type cannot be reverted.

> Note
>
> An activity type can be deleted only if no activity exists that bases on the type. If deleting an activity type cannot be avoided, all existing activities basing on the type must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the activity instead.
>
> See *Disabling an Activity Type* above.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.

3. Click *Activity Type* in the menu on the left side.

   The *Activity Types Configuration* page is displayed.

4. On the left side of the page, select the type you want to delete.

   In the *Details* section on the right side, the properties of the type are displayed.

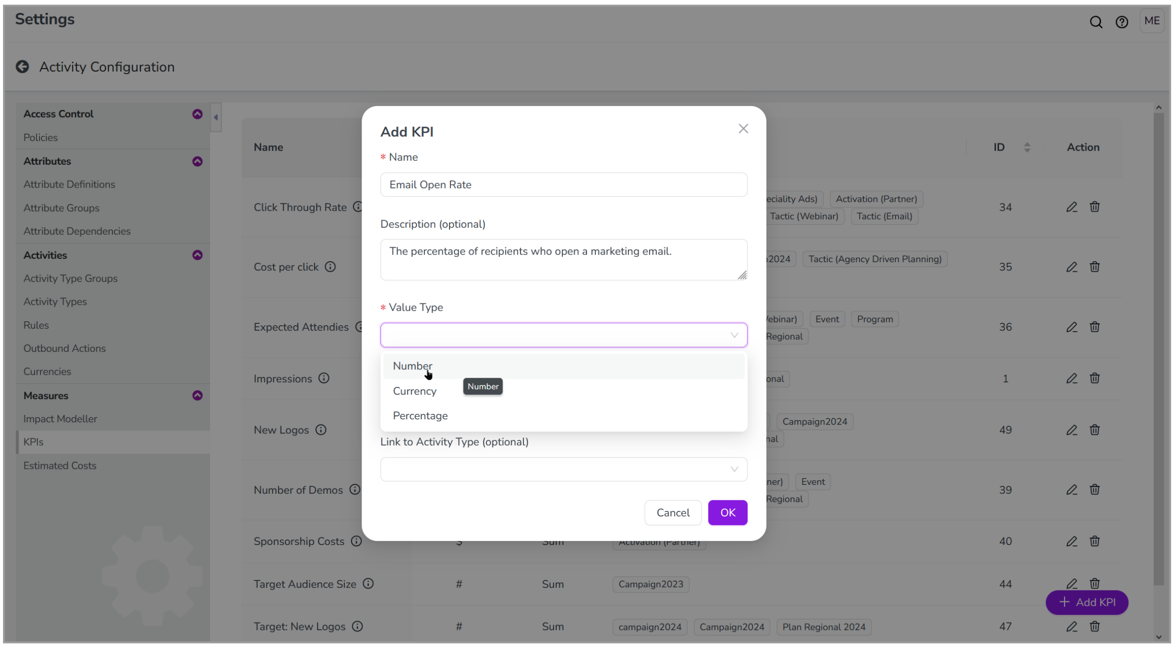
5. Click *Delete Activity Type* at the bottom right of the page.

You have deleted the activity type.

#### 6.2.2.6 Setting Up KPIs

As an administrator you can set up KPIs in the settings section:

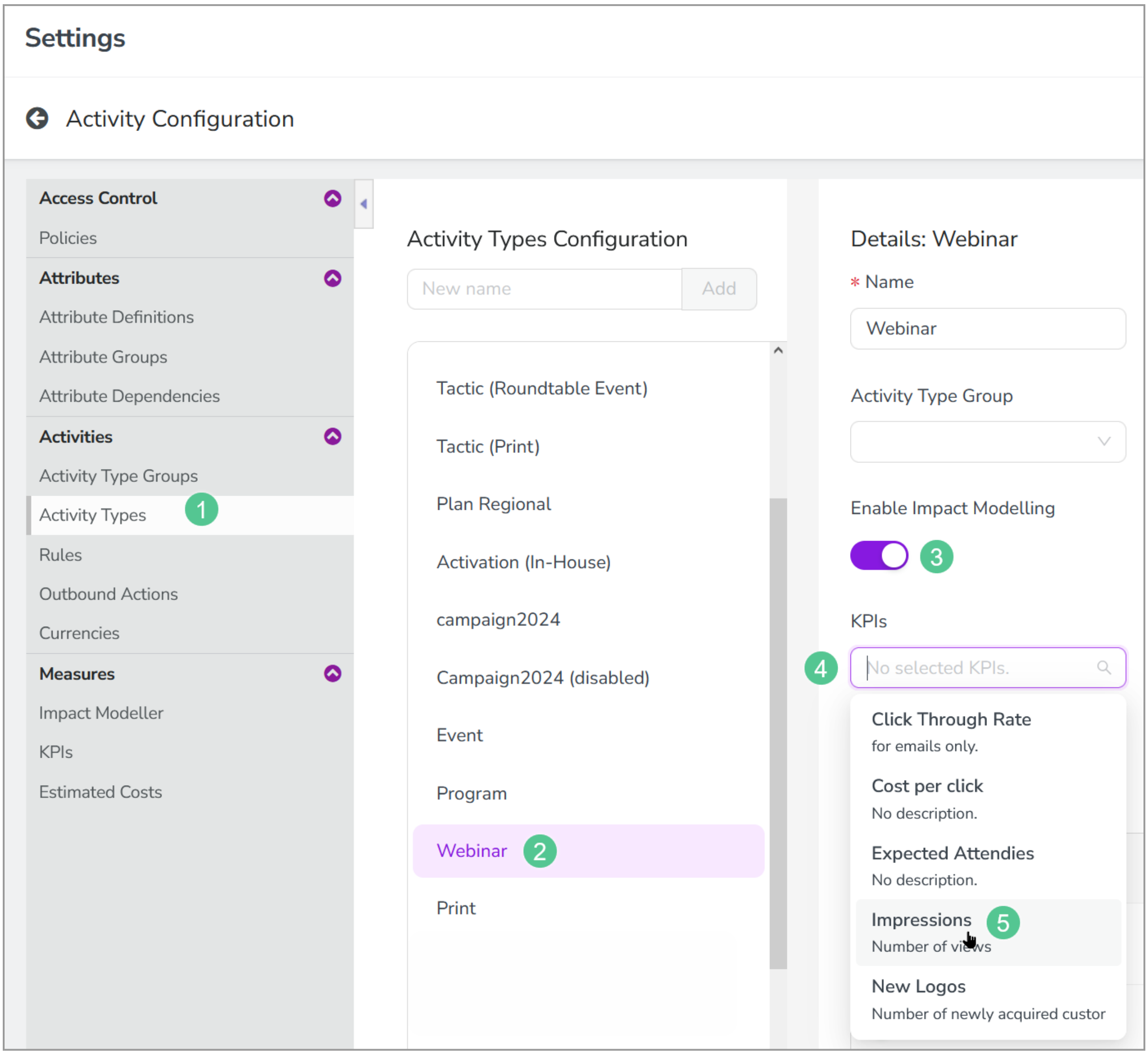
1. Click > *Activities* > *Settings* > *KPIs*.
2. Click *Add KPI* in the lower right corner.
3. In the *Add KPI* dialog, enter name and description.




4. Select a *Value Type*.
5. Select a *Calculation Type*.
6. Link the KPI to the activity type for which you want to measure the KPI.
7. Click *OK*.

You created a KPI.

Instead of step 6, go to the *Activity Type* settings page, select an activity type, and assign all KPIs in the same number sequence as in this screenshot:

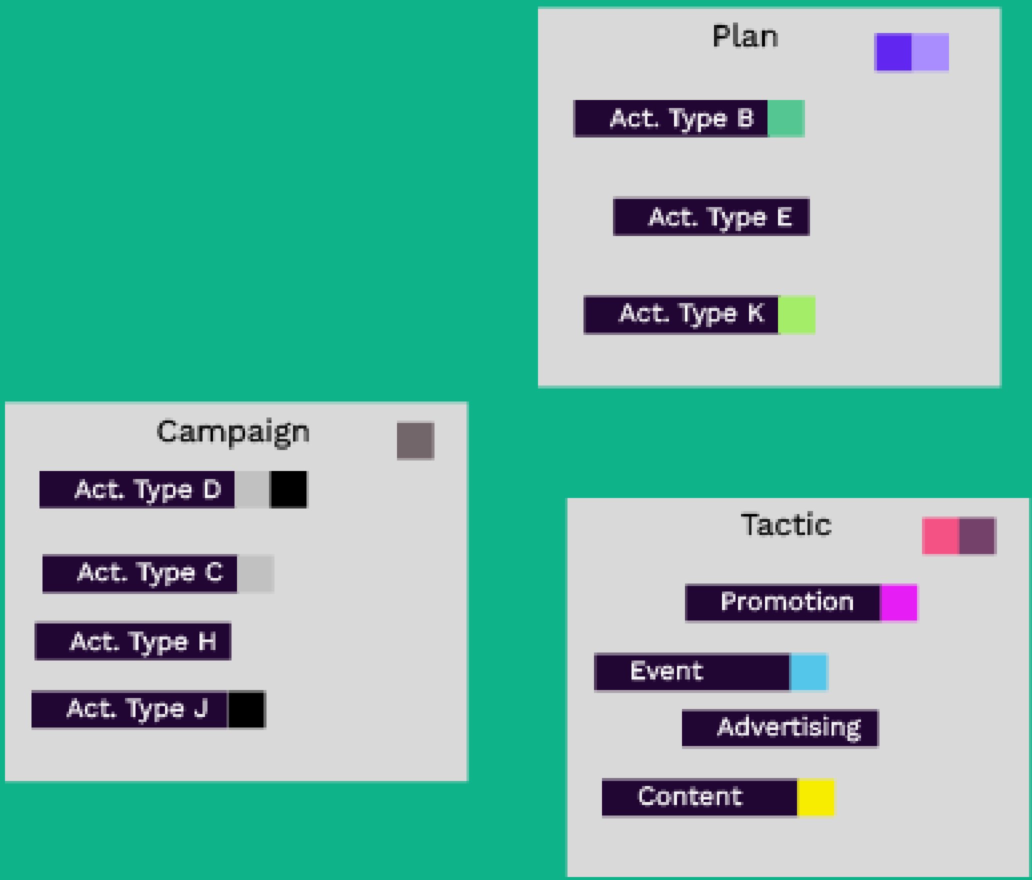



## 6.2.3 Rules

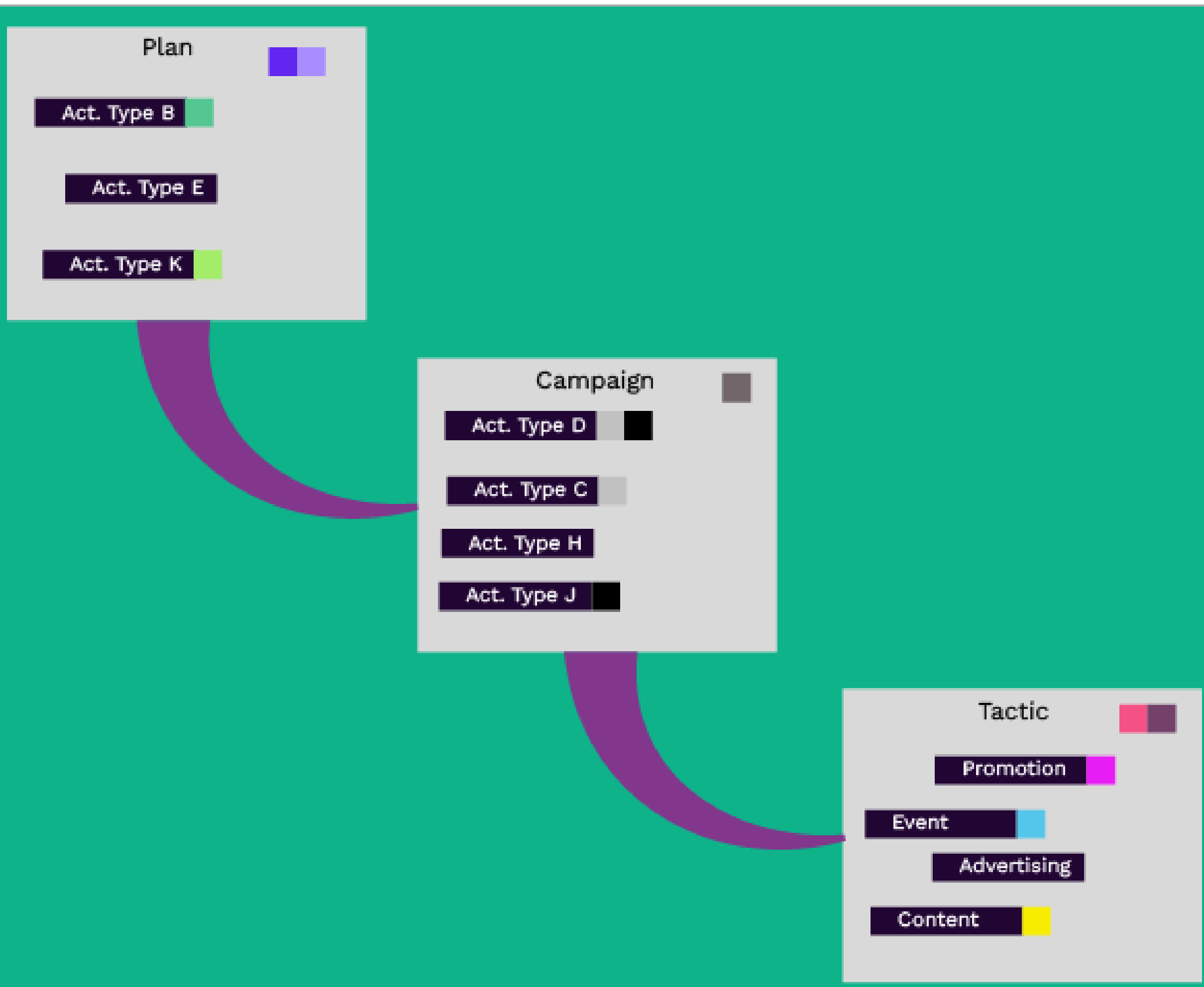
With rules you define how the hierarchy of activities is structured. This means, for example, which activity type or activity type group can be used as root element and how other activity types and activity type groups can be arranged below it.

EXAMPLE

Let's assume that you have created the following three activity type groups and assigned the activity types to them:




Now you want to define that the activity types of the *Plan* group can be created as root elements, the activity types of the *Campaign* group as descendants. The activity types of the *Tactic* group should only be available as descendants of the *Campaign* group:




You define these relationships, shown in the previous image with the purple connections, by rules. Note that the rule always states who is parent in the hierarchy, shown here by the wider part of the link.

## How Rules Work

A rule always specifies the relationship between a parent and a child. You can set activity types and activity type groups as both parent and children. The number of rules is not limited.

One limitation arises from the way attributes work in the background: In the hierarchy, activities additionally and invisibly inherit in the background all attribute values of their ancestors. To avoid inconsistencies due to multiple defined values for an attribute, an attribute can only be used once in a path. Therefore, you will not be able to create a rule where a child activity is assigned the same attribute as the parent.

The consequence is, for example, that you cannot define a direct circle. Let us explain this with an example: You have created a rule where Group A is the parent of Group B. This means that you cannot create another rule by which Group B (or an assigned activity type) can become a direct parent of Group A (or an assigned activity type).

Another limitation: Each activity type and activity type group can only have one parent. This is particularly important if you are building a complex hierarchy.

For examples please note *How to Map Your Hierarchy in Rules* below.

## Disabling or Deleting Rules?

As an administrator, you have the ability to both disable and delete rules. When should you use which function?

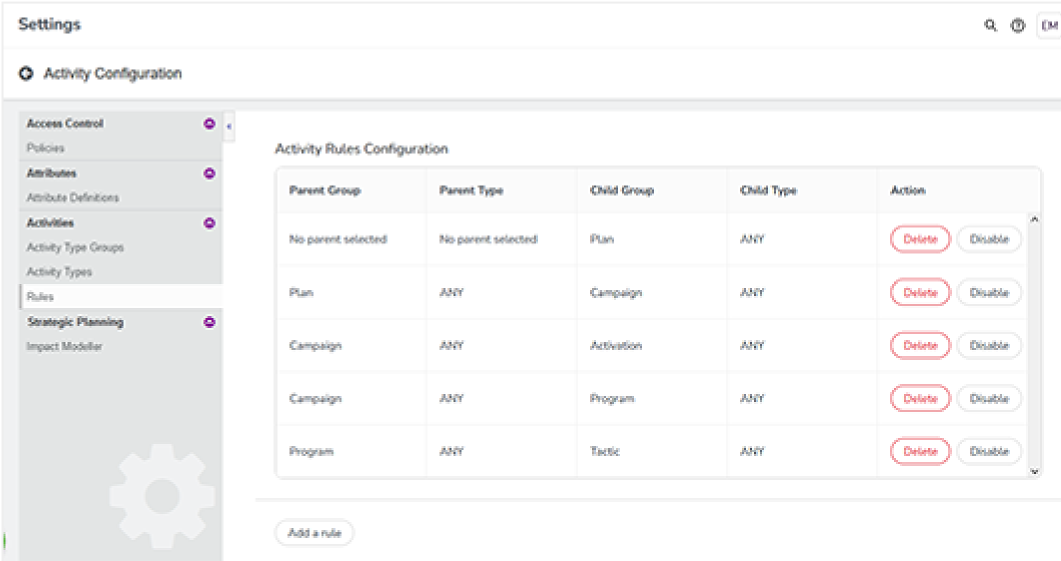
- Disabling : Disable if user shouldn't use the rule anymore. If you disable rule, users cannot create activities basing on the type.
- Deleting : A rule can be deleted only if no activity exists that uses that rule. If deleting a rule cannot be avoided, all existing activities using the rule must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the rules instead.

## Related Actions

- *Creating a Rule* on page 161
- *Disabling a Rule* on page 162
- *Deleting a Rule* on page 163

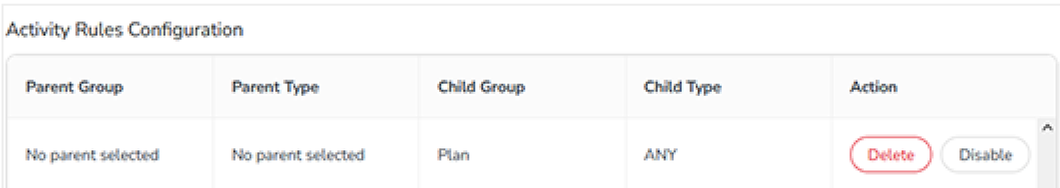
### 6.2.3.1 How to Map Your Hierarchy in Rules

Rules are entered in the *Activities* settings on the *Rules* page in tabular form. Each line defines one relationship:



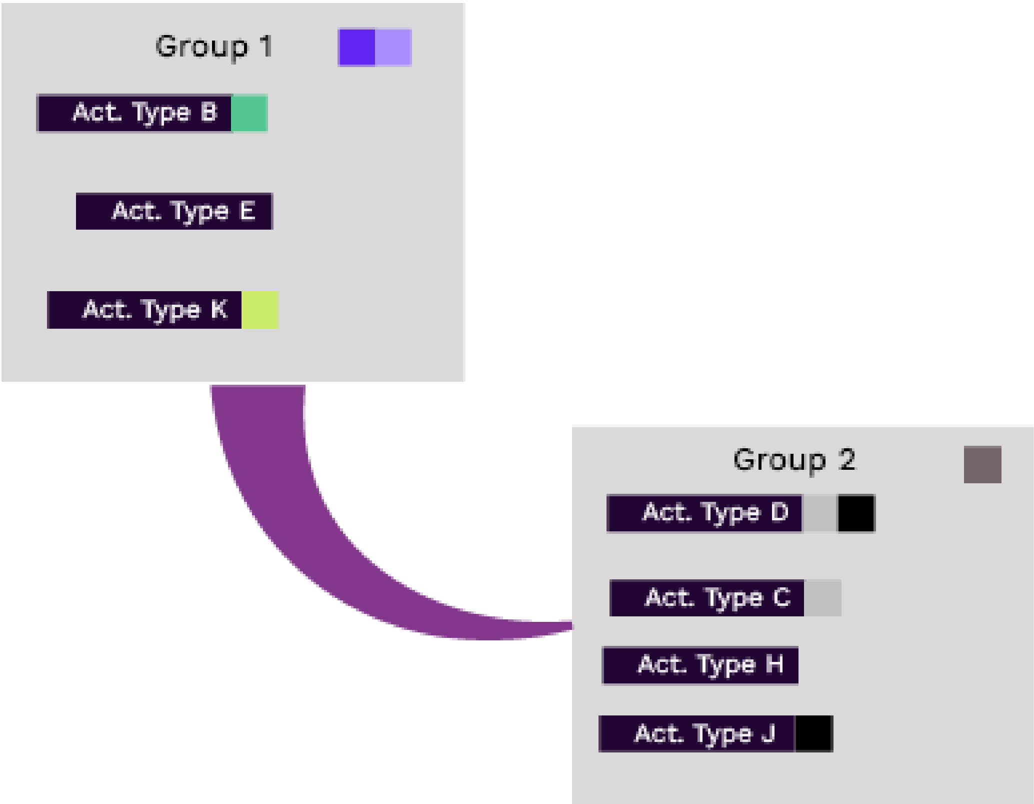

## Defining Root Elements

Lines in which neither a parent group nor a parent type is entered define the root elements. In the following example, the *Plan* group is created without a parent. This means that all activity types assigned to the *Plan* group can be set as root element:




## How to Map Relationships Between Groups

Let's assume you want to create a relationship between the *Group 1* and its child *Group 2*.

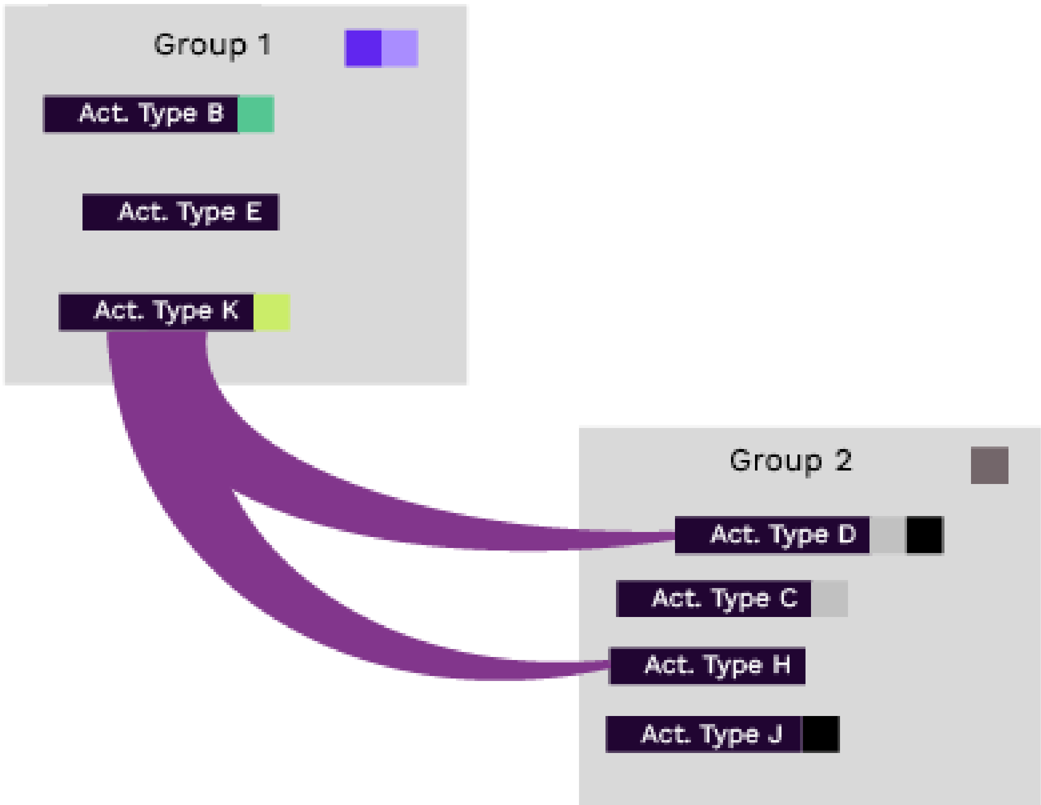



The following screenshot shows this case in the second line. This means that all activity types of the *Campaign* group can be created as children of all activity types of the *Plan* group.

| | | | | |
|---|---|---|---|---|
| No parent selected | No parent selected | Group 1 | ANY | Delete Disable |
| Group 1 | ANY | Group 2 | ANY | Delete Disable |

## How to Map Relationships Between Types

However, you may find that an activity type should only be used as a child of a specific other activity type. An example could be that you want to use certain campaign types only within a strategically oriented plan. The following picture shows *Activity Type K* (assigned to the *Group 1*), for which only *Activity Types D* and *H* should be created as children:

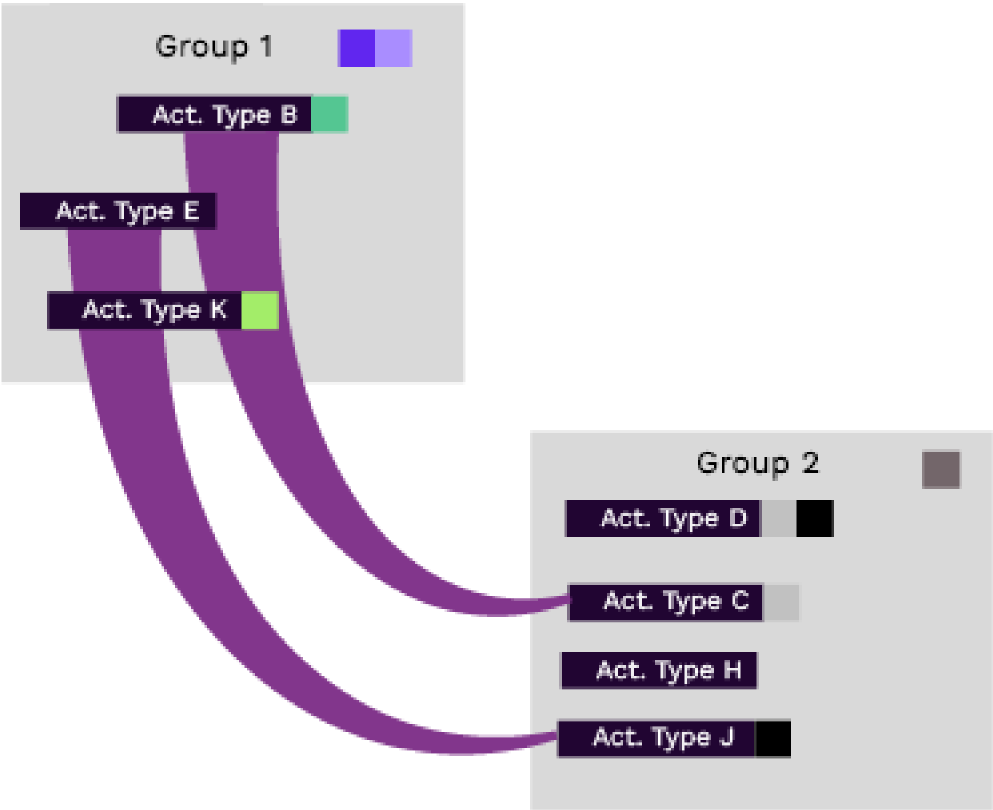



You create this as follows:

Activity Rules Configuration

| Parent Group | Parent Type | Child Group | Child Type | Action |
|---|---|---|---|---|
| No parent selected | No parent selected | Group 1 | ANY | Delete Disable |
| Group 1 | Act. Type K | Group 2 | Act. Type D | Delete Disable |
| Group 1 | Act. Type K | Group 2 | Act. Type H | Delete Disable |

If you want to maintain the exclusive relationship of *Activity Type K* to *D* and *H*, you must create separate rules for *B* and *E* as well. A simple solution is to also only link these to activity types from the *Campaign* group, for example *Activity type E* as parent of *Activity type J* and *Activity type B* as parent of *Activity type C*:




### More complex cases

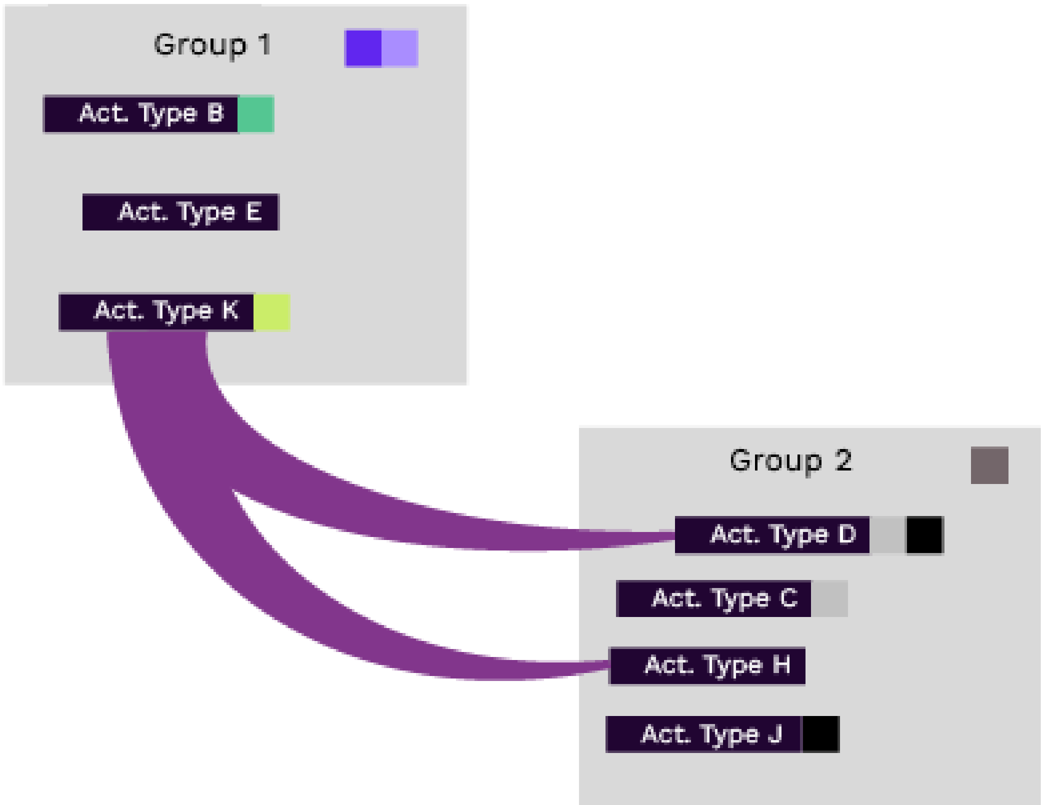
The previous sections describe rules that connect two levels of the hierarchy either only via groups or only via types. But what if your hierarchy is more complex? This section provides solutions for various cases.

The most important rule to consider is: Each activity type and activity type group can only have one parent.

Let's start with the following example, where *Activity Type K* is defined as parent for *Activity Types D* and *H*.



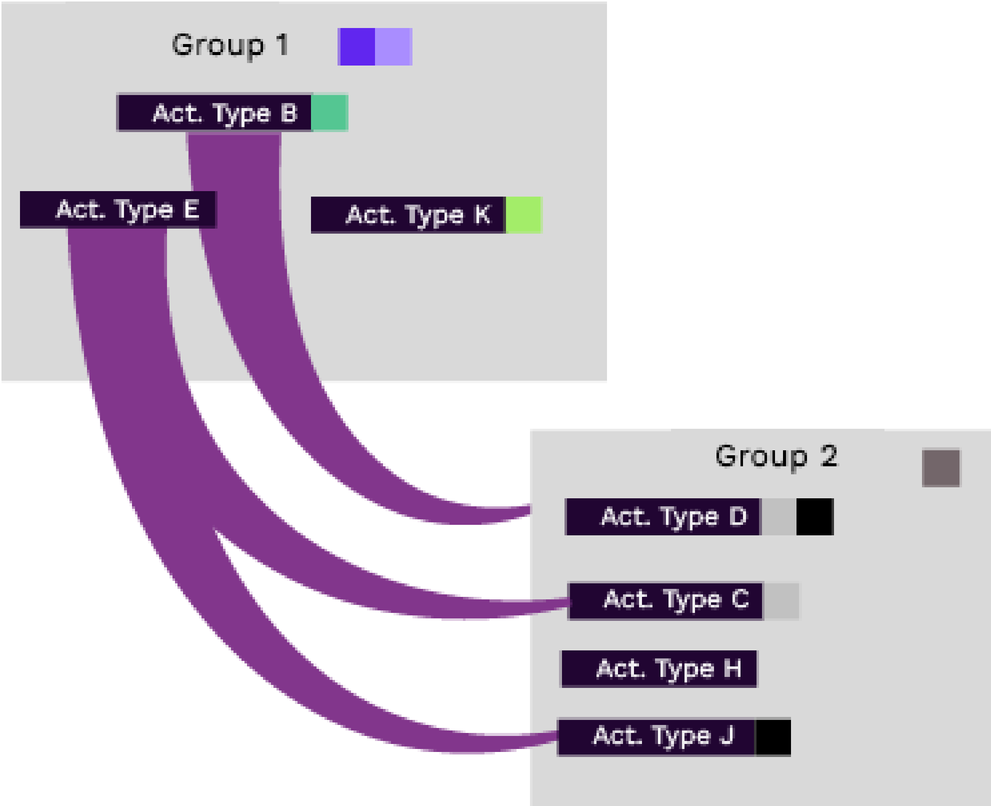
 




In addition to the combination of types described in the previous section, the following cases are also conceivable:

## Case 1: One Relationship with a Child Group

- *Activity type E* as parent of *Activity type C* and *Activity type J*, i.e. activities of type C and J can be created as children of activities of type K.
- *Activity type B* as parent of *Campaign* group, i.e. all activities of types D, C, H and J can be created as children of activities of type B.

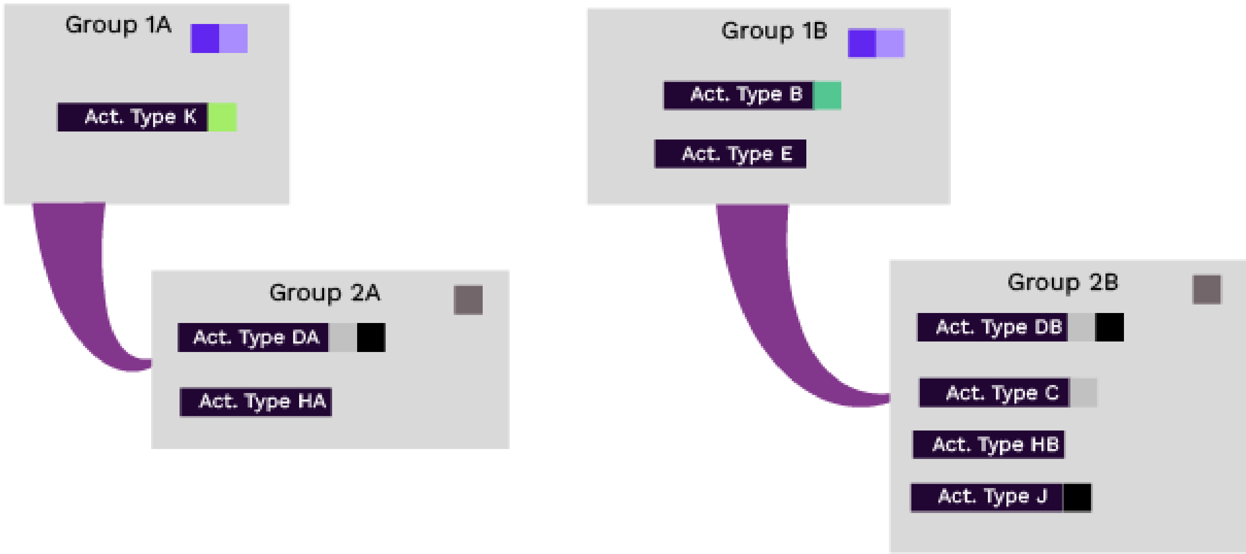



This mapping is possible because it does not violate the restriction that each object may only have one parent and can be implemented by rules as follows:

| | | | | | | |
|---|---|---|---|---|---|---|
| No parent selected | No parent selected | Group 1 | ANY | Delete | Disable | Group 1 as root group |
| Group 1 | Act. Type K | Group 2 | Act. Type D | Delete | Disable | Activity Type K as parent of activity types D and H |
| Group 1 | Act. Type K | Group 2 | Act. Type H | Delete | Disable | |
| Group 1 | Act. Type E | Group 2 | Act. Type C | Delete | Disable | Activity Type E as parent of activity types C and J |
| Group 1 | Act. Type E | Group 2 | Act. Type J | Delete | Disable | |
| Group 1 | Act. Type B | Group 2 | ANY | Delete | Disable | Type B as parent of Group 2 |

## Case 2: Two or More Relations to a Child Group

But how do you handle this if you have to create several rules for *Group 2* as child? An example would be if in the previous example *Activity Type E* was also a possible parent of *Group 2*. Well, in this case, split up your hierarchy:




This reduces your set of rules to 4 simple group rules:

- One each for *Group 1A* and *Group 1B* as root element
- One each for the relationship from *Group 1A* to *Group 2A* and from *Group 1B* to *Group 2B*

| | | | | | |
|---|---|---|---|---|---|
| No parent selected | No parent selected | Group 1A | ANY | Delete | Disable |
| No parent selected | No parent selected | Group 1B | ANY | Delete | Disable |
| Group 1A | ANY | Group 2A | ANY | Delete | Disable |
| Group 1B | ANY | Group 2B | ANY | Delete | Disable |

### 6.2.3.2 Creating a Rule

## Prerequisites

To be able to create a rule, the following objects must be created beforehand:

- The needed activity types and activity type groups.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .



The settings for activity configuration are displayed.

3. Click *Rules* in the menu on the left side.

   The *Activity Rules Configuration* page is displayed.

4. In bottom-left corner of the page, click *Add a rule*.

   A line is added to the table.

5. In the *Parent Group* and *Parent Type* columns of the line, define the parent of the relation.
6. In the *Child Group* and *Child Type* columns, define the child of the relation.
7. In the *Action* column, click *Save*.

You have created the rule.

#### 6.2.3.3 Disabling a Rule

> Note
>
> When a rule is disabled, activities using the rule cannot be created. Existing activities using on the type are not affected.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.

3. Click *Rules* in the menu on the left side.

   The *Activity Rules Configuration* page is displayed.

4. Inline with the rule you want to disable, click *Disable* in the *Action* column.

You have disabled the rule.

#### 6.2.3.4 Deleting a Rule

Attention! Data Loss!

Deleting a rule cannot be reverted.

Note

A rule can be deleted only if no activity exists that uses that rule. If deleting a rule cannot be avoided, all existing activities using the rule must first be deleted. Before deleting activities, check if you might lose data that you need for reporting. If so, consider disabling the rules instead.

See *Disabling an Activity Type* on page 149.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.
3. Click *Rules* in the menu on the left side.

   The *Activity Rules Configuration* page is displayed.
4. Inline with the rule you want to disable, click *Delete* in the *Action* column.

You have deleted the rule.



# 6.3 Access to Activities

Access to activities is controlled by policies. A policy is a defined set of access statements that is assigned to users or teams.

## How Policies Work

By default, a user has no access to activities. You as the administrator can create policies and assign access statements. Uptempo currently offers the following access statements:

- Full access to a single activity type group
- Full access to a single activity type
- Full access to all activity types

Full access means that a user can

- Select the included types or groups when creating, filtering and grouping and
- Open and edit the details panel of activities of the included types or groups.

By combining several statements, you can grant individual users or teams access, for example to certain levels of the hierarchy.

In case users are assigned to several policies, they get access to all contained groups and types.

## Related Actions


- *Create Policy* below
- *Edit Policy* on the facing page
- *Delete Policy* on page 167


## 6.3.1 Create Policy

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.
3. Click *Policies* in the menu on the left side.

   The *Policies* page is displayed. Existing policies might be hidden within a dropdown.

4. In the top right corner of the *Policies* dropdown, click *Add Policy*.

   The *Add Policy* dialog is opened.

5. Enter a name.
6. So that you or your colleagues can later understand the purpose and use of the policy: Enter a short and concise description of the policy.
7. Click *Save*.
8. Add statements to the policy:
   a. On the right side of the new policy's row, click the *Plus* icon.

      The *Add Statements* dialog is displayed.

   b. Select the statements you want to add to the policy by clicking its Plus icon. At the top of the list you will find the group statements, followed by the type statements. At the end of the list the *Full Acccess to All activity types* statement can be found. Select an item in the dropdown or enter a keyword to search the dropdown.
   c. Click outside the dialog to close it.
9. Assign users or teams to the policy:
   1. On the left side of the policy's name, click the arrow.

      The policy's data and added statements are displayed.

   2. On the bottom right click *Link user(s)/team(s)*.

      The *Link User(s)/Team(s)* dialog is displayed.

   3. In the dropdowns, select the teams and users you want to assign. If you do not see all teams or users directly, enter the name. The dropdowns will display possible matches.
   4. Click *Link Users*.

The *Policies* page is displayed. You have created a policy, added statements and assigned users. The users now have access to the hierarchy according to the statements.

## 6.3.2 Edit Policy

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙.

   The settings for activity configuration are displayed.

3. Click *Policies* in the menu on the left side.

   The *Policies* page is displayed. Existing policies might be hidden within a dropdown.

4. Open the dropdown to see all policies and select the policy you want to edit.

5. In case you want to edit the policy's name and description:

   a. Click the pencil icon right to the policy's name.

      The *Edit name & description* dialog is displayed.

   b. If necessary: Edit the name.

   c. If necessary: Edit the description.

   d. Click *Save*.

      You have edited name and description.

6. In case you want to edit the statements of the policy:

   - In case you want to add statements:

     a. On the right side of the new policy's row, click the *Plus* icon.

        The *Add Statements* dialog is displayed.

     b. Select the statements you want to add to the policy by clicking its Plus icon. At the top of the list you will find the group statements, followed by the type statements. At the end of the list the *Full Acccess to All activity types* statement can be found.

     c. Click outside the dialog to close it.

        You have added statements.

   - In case you want to delete statements:

     a. On the left side of the policy's name, click the arrow.

        The policy's data and added statements are displayed.

     b. Inline the statement you want to delete, click ×.

        You have deleted statements.

7. In case you want to edit user or team assignment:

   a. Make sure you can see the policy's data and assigned statements. If you cannot see them, then click the arrow on the left side of the policy's name.

      The policy's data and added statements are displayed.



b. On the bottom right click *Link user(s)/team(s)*.

   The *Link User(s)/Team(s)* dialog is displayed.

c. In the dropdowns, edit the teams and users assignment. If you want to assign user or teams, but you do not see all teams or users directly, enter the name. The dropdowns will display possible matches.
   If you want to delete an assignment, click × on the user's or team's name label.

d. Click *Link Users*.

You have edited the user and team assignment.

You have edited the policy.

## 6.3.3 Delete Policy

Attention! Data Loss!

Deleting a policy cannot be reverted.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click .

   The settings for activity configuration are displayed.

3. Click *Policies* in the menu on the left side.

   The *Policies* page is displayed. Existing policies might be hidden within a dropdown.

4. Open the dropdown to see all policies.
5. On the section of the policy you want to delete, click the  icon.

   A security prompt is displayed.

6. Click *Yes*.

You have deleted the policy. Access for the assigned users is no longer possible in accordance with this policy.



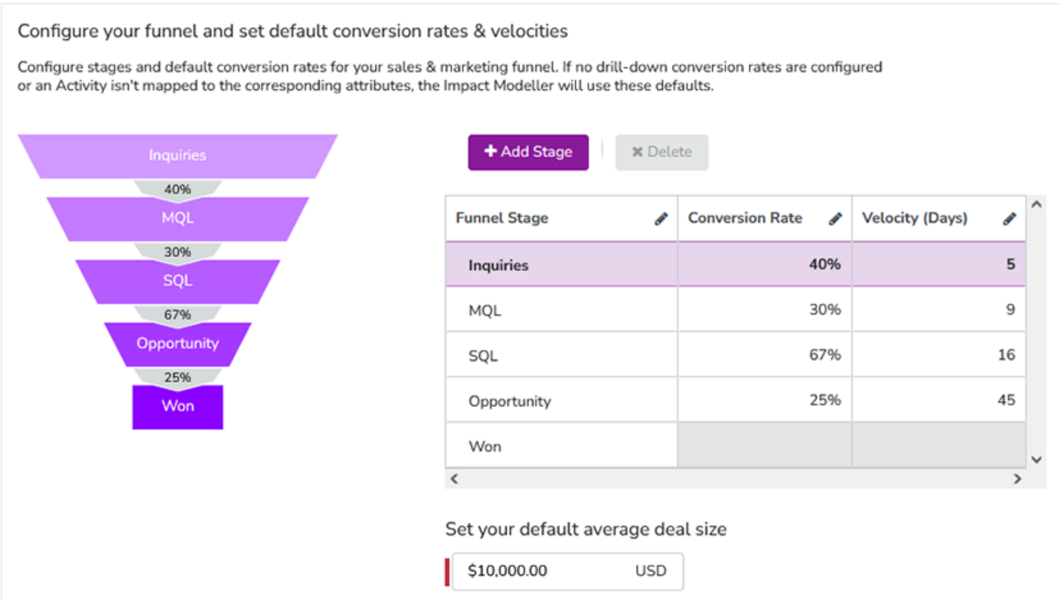
 

# 6.4 Impact Modeler

As the administrator you configure the marketing funnel. The marketing funnel is a model that represents the theoretical customer journey towards the purchase of a product or service. It's often depicted as a funnel to illustrate the decrease in numbers that occurs at each step of the process. The marketing funnel helps marketers visualize the customer journey and plan their marketing strategies accordingly.

## How Impact Modeling Works

The following screenshot shows a default setup of a funnel in Plan.




The funnel is defined by the following information:

- *Stages*: A stage represents a step in the customer's journey towards making a purchase. A funnel usually has 2 to 10 stages, depending on your marketing and sales processes.
- *Conversion rates*: Conversion rates represent the percentage of inquiries that reach the next stage.
- *Velocity*: Average number of days it takes a lead to progress from one funnel stage to the next.
- *Average deal size*: Average revenue for closed opportunities (B2B) or average order size (B2C).

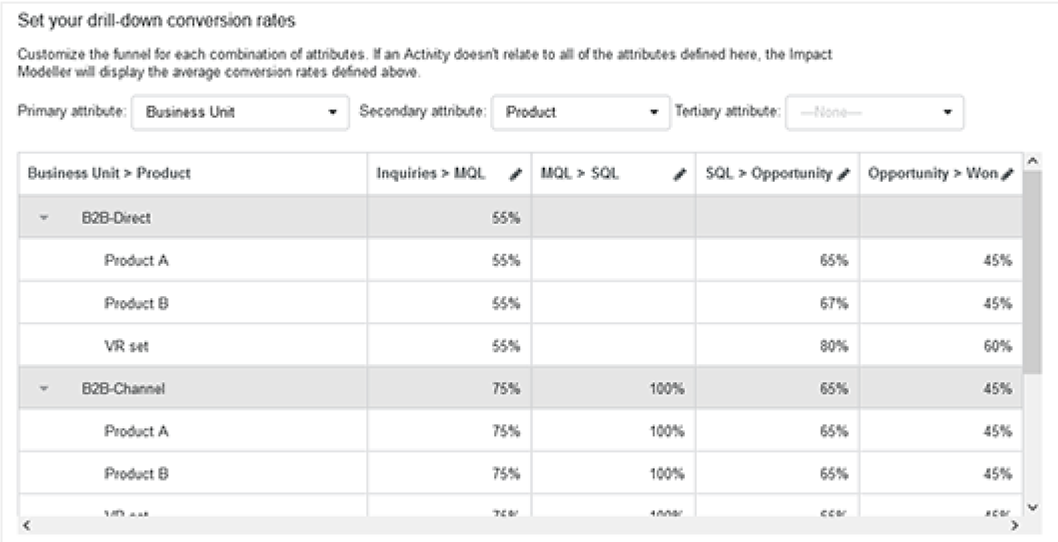
When a user enters a planned number of inquiries for an activity, the application calculates when to expect what number of inquiries and what projected revenue based on above funnel information.

However, conversion rates, velocity, and average deal size may not be identical for every activity. You can define exceptions for these activities.

## Exceptions for Conversion Rates

For activities whose conversion rates differ from the default ones, exceptions can be set up. The exceptions are tied to activities by selecting 1 to 3 attributes for differentiation. The following example shows exceptions that are drilled down according to *Business Unit* as primary attribute and *Product* as second attribute.


Set your drill-down conversion rates

Customize the funnel for each combination of attributes. If an Activity doesn't relate to all of the attributes defined here, the Impact Modeller will display the average conversion rates defined above.

Primary attribute: Business Unit · Secondary attribute: Product · Tertiary attribute: —None—

| Business Unit > Product | Inquiries > MQL | MQL > SQL | SQL > Opportunity | Opportunity > Won |
|---|---|---|---|---|
| B2B-Direct | 55% | | | |
| Product A | 55% | | 65% | 45% |
| Product B | 55% | | 67% | 45% |
| VR set | 55% | | 80% | 60% |
| B2B-Channel | 75% | 100% | 65% | 45% |
| Product A | 75% | 100% | 65% | 45% |
| Product B | 75% | 100% | 65% | 45% |

EXAMPLE

The default funnel definition for the *Inquiries to MQL* conversion rate is set to 40 %:

| Funnel Stage | Conversion Rate | Velocity (Days) |
|---|---|---|
| Inquiries | 40% | 5 |

But when an activity is assigned to *B2B-Direct* business unit and *Product A*, then project revenue is calculated with conversion rate of 55 %. For *Product B* within that business unit conversion rate for this stage is set to 45 %. *VR set* product uses the default conversion rate.

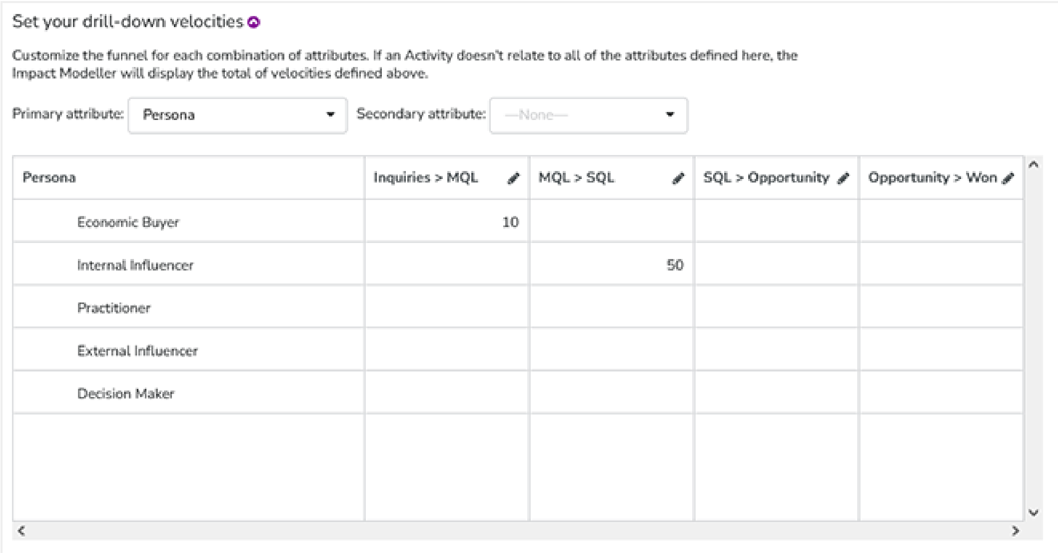
| Business Unit > Product | Inquiries > MQL |
|---|---|
| B2B-Direct | |
| Product A | 55% |
| Product B | 45% |
| VR set | |

## Exceptions for Velocities

For activities whose velocities differ from the default ones, exceptions can be set up. The exceptions are tied to activities by selecting 1 to 3 attributes for differentiation. The following example shows exceptions that are drilled down according to *Persona* as primary attribute. No secondary or tertiary attribute is selected.




Set your drill-down velocities

Customize the funnel for each combination of attributes. If an Activity doesn't relate to all of the attributes defined here, the Impact Modeller will display the total of velocities defined above.

Primary attribute: Persona Secondary attribute: —None—

| Persona | Inquiries > MQL | MQL > SQL | SQL > Opportunity | Opportunity > Won |
|---|---|---|---|---|
| Economic Buyer | 10 | | | |
| Internal Influencer | | 50 | | |
| Practitioner | | | | |
| External Influencer | | | | |
| Decision Maker | | | | |

EXAMPLE

The default funnel definition for the *Inquiries to MQL* velocity is set to 5 days:

| Funnel Stage | Conversion Rate | Velocity (Days) |
|---|---|---|
| Inquiries | 40% | 5 |

But when an activity is assigned to *Economic Buyer* persona, then project revenue is calculated with velocity of 10 days. For *Internal Influencer* activities the default velocity is used.

| Persona | Inquiries > MQL |
|---|---|
| Economic Buyer | 10 |
| Internal Influencer | |

## Exceptions for Average Deal Size

For activities whose average deal size differ from the default ones, exceptions can be set up. The exceptions are tied to activities by selecting 1 to 3 attributes for differentiation. The following example shows exceptions that are drilled down according to *Customer Segment* as primary attribute, *Product* as secondary attribute, and *Country* as tertiary attribute.

Set your drill-down deal sizes

Customize the funnel for each combination of attributes. If an Activity doesn't relate to all of the attributes defined here, the Impact Modeller will display the average deal size defined above.

Primary attribute: Customer Segment | Secondary attribute: Product | Tertiary attribute: Country

| Customer Segment > Product > Country | Average Deal Size |
|---|---|
| Enterprise | |
| Product A | |
| USA | |
| Canada | $12,000.00 |
| Mexico | $9,000.00 |
| UK | |
| Germany | $15,000.00 |

EXAMPLE

The default average deal size is set to 10,000 $:

Set your default average deal size

If no drill-down deal sizes are configured or an Activity isn't mapped to the corresponding attributes, the Impact Modeller will use this deal size.

$10,000.00 USD

But when an activity is assigned to *Enterprise* customer segment and *Product A*, then project revenue is calculated with different default average deal sizes for *Canada*, *Mexico* and *Germany*.

| Customer Segment > Product > Country | Average Deal Size |
|---|---|
| Enterprise | |
| Product A | |
| USA | |
| Canada | $12,000.00 |
| Mexico | $9,000.00 |
| UK | |
| Germany | $15,000.00 |



### Related Actions

- *Set up Funnel* below
- *Reset Funnel* on the next page

## 6.4.1 Set up Funnel

1. In side navigation, click *Activities*.
2. In the *Activities* view, click ⚙ in the upper right corner.

   The settings for activity configuration are displayed.
3. Click *Impact Modeler* in the menu on the left side.

   The *Funnel Setup* page is displayed.
4. Set-up the default funnel:
   a. If there is no stage that you can edit, click *Add Stage*.
   b. In the *Funnel Stage* column, enter the stage's name.
   c. Enter the conversion rate (percentage of inquiries that reach the next stage).
   d. Enter the velocity (average number of days it takes a lead to progress from this stage to the next).
   e. Repeat steps a to d for every stage you need. If you want to delete unnecessary stages, select the stage and then click *Delete* above the table.
   f. If you want to change the order of the stages, drag-and-drop the rows to the correct order.
5. Set your conversion rate exceptions:
   a. Open the *Set your drill-down conversion rates* section.
   b. Select the attributes by which you drill-down to the activities that need a conversion rate exception. You must select at least a primary attribute to be able to define conversion rate exceptions. Secondary and tertiary attribute are optional.
   c. Enter the adopted conversion rate for all exceptions. If a cell remains empty, the default conversion rate is used.
6. Set your velocity exceptions:



   a. Open the *Set your drill-down velocities* section.
   b. Select the attributes by which you drill-down to the activities that need a velocity exception. You must select at least a primary attribute to be able to define velocity exceptions. Secondary and tertiary attribute are optional.
   c. Enter the adopted conversion rate for all exceptions. If a cell remains empty, the default velocity is used.
7. Set your deal size exceptions:
   a. Open the *Set your drill-down deal sizes* section.
   b. Select the attributes by which you drill-down to the activities that need a deal size exception. You must select at least a primary attribute to be able to define deal size exceptions. Secondary and tertiary attribute are optional.
   c. Enter the adopted deal sizes for all exceptions. If a cell remains empty, the default deal size is used.
8. Click *Save*.

You have set-up the funnel.

### 6.4.2 Reset Funnel

> Attention! Data Loss!
>
> Resetting the funnel cannot be reverted.

1. In side navigation, click *Activities*.
2. In the *Activities* view, click in the upper right corner.

   The settings for activity configuration are displayed.
3. Click *Impact Modeler* in the menu on the left side.

   The *Funnel Setup* page is displayed.
4. In the top left corner, click *Clear Funnel*.

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

The funnel is reset.

# 6.5 Other Settings

Additionally, you can use the following functions:

- With outbound actions you integrate your specific business processes and trigger actions in third party systems. Outbound actions are bound to activity types and can be triggered for every activity basing on these types.

  For more information see *Connecting to Business Processes: Outbound Actions* below

- It is possible to define a different primary currency for activities. All activity amounts are shown in the selected primary currency.

  For more information see *Primary Currency for Activities* below

- You can customize how estimated costs are entered and displayed.

  For more information see Configure Estimated Costs options

## 6.5.1 Connecting to Business Processes: Outbound Actions

With outbound actions you integrate your specific business processes and trigger actions in third party systems. Outbound actions are bound to activity types and can be triggered for every activity basing on these types.

You have the possibility to create the following types of outbound actions:

- Opening an URL
- Triggering an e-mail
- Handing over selected data of the activity to a URL, e.g. a third-party system.

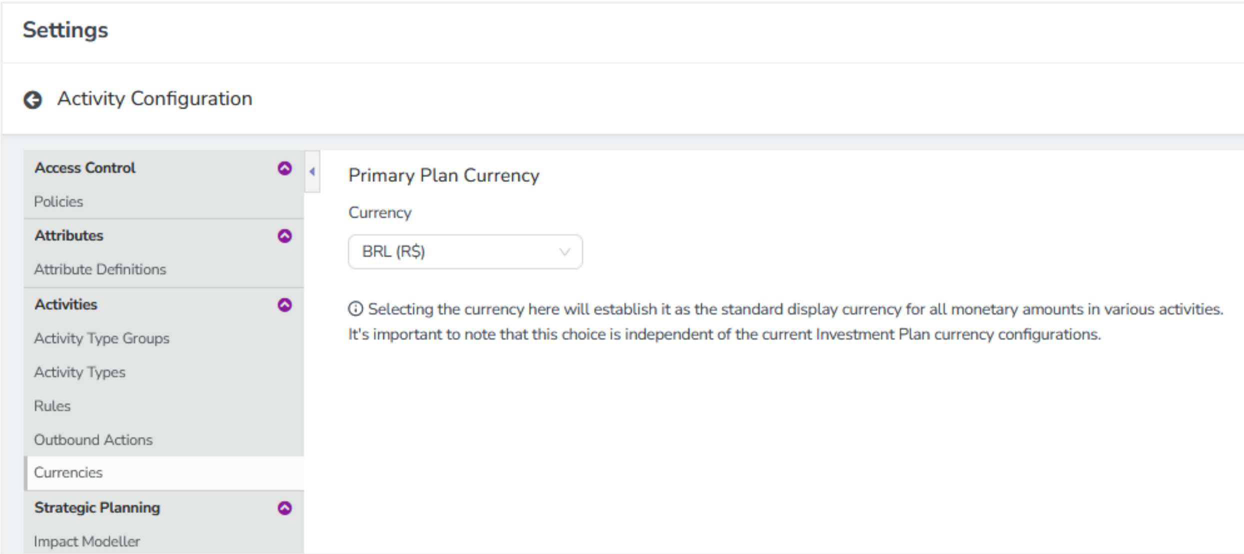
Usually, outbound actions are implemented on system setup. In case you need more details talk to your Uptempo contact.

## 6.5.2 Primary Currency for Activities

It is possible to define a different primary currency for activities. All activity amounts are shown in the selected primary currency.

If a funding investment is managed with a different currency, then the amounts are converted. The exchange rates stored under > *Budgets* > *Master Settings* > *Currency* are used for the conversion.

You set the primary currency in the activity settings:


Settings
Activity Configuration
Access Control
Policies
Attributes
Attribute Definitions
Activities
Activity Type Groups
Activity Types
Rules
Outbound Actions
Currencies
Strategic Planning
Impact Modeller
Primary Plan Currency
Currency
BRL (R$)
Selecting the currency here will establish it as the standard display currency for all monetary amounts in various activities.
It's important to note that this choice is independent of the current Investment Plan currency configurations.

# GLOSSARY

## A

### Activity

Any targeted action or measure taken by a company to promote its products or services, attract customers, or increase sales.

### Activity Hierarchy

The structured organization of marketing activities, typically including levels such as Plan, Campaign, Program, and Tactic.

### Activity Type

A template for activities that defines what attributes are available and required, and what workflows are associated with the activity.

### Activity Type Group

A collection of related activity types, used to organize and manage activity types more efficiently.

### Activity Wizard

A guided process for creating new activities, ensuring all necessary information is entered.

### Actuals

The actual amount spent on a marketing investment, typically imported from financial systems.

### Attributes

Specific properties are assigned to activities, investments, or other system elements. These can include dates, text, drop-down options, or numeric values. They help categorize, describe, and analyze marketing efforts and can be customized to meet an organization's unique needs and reporting requirements.

### Attribution

The process of identifying which marketing efforts contribute to sales or conversions.

### Audit Trail

A chronological record of actions taken within the system, showing who did what and when.

## C

### Campaign

A coordinated series of marketing activities aimed at achieving a specific marketing goal.

### Conversion

When potential customer takes a desired action. This could be making a purchase, signing up for a newsletter, downloading a whitepaper, or any other goal defined. In the context of the Impact Modeler, conversion rates represent the percentage of leads or prospects that progress from one stage of the marketing funnel to the next.

### CRM

A technology for managing all your company's relationships and interactions with customers and potential customers (Customer Relationship Management).

### Customer Journey

The complete sum of experiences that customers go through when interacting with your company and brand. It considers the full experience of being a customer.

### Customer Relationship Management

A technology for managing all your company's relationships and interactions with customers and potential customers (CRM).

## D

### Demand Generation

Marketing programs designed to create awareness and interest in a company's products or services.

### Dependencies

They help in creating logical relationships between different attributes of activities, making data entry more efficient and reducing errors. A relationship between two attributes (typically drop-down or multi-select fields) where the options available in one field (the dependent field) are determined by the selection made in another field (the controlling field).

### Details Panel

A UI component in the Plan and Spend modules that displays and allows editing of information for a selected item (activity, investment, line item, etc.). It includes various attributes, metrics, and other relevant data specific to the selected item. It is the central location for viewing and managing comprehensive information about individual elements.

## E

### Estimated Cost

The initial estimate of how much an activity will cost, recorded at the beginning of planning.

## F

### Forecast

The latest expected cost of marketing investments as marketers execute on their plans. Updated throughout the year to reflect changes from the original plan.

### Forecast Status Tag

A label indicating the current status of forecasted spend (e.g. Forecast, Committed, Occurred).

### Funnel

A model that represents the theoretical customer journey towards the purchase of a product or service, often visualized as stages from awareness to purchase.

## H

### Hierarchy

The organizational structure of folders, sub-folders and investment plans in Spend.

## I

### Impact Modeler

A feature that projects expected revenue from marketing activities based on demand-generation goals.

### In-Market Period

The specific timeframe during which a marketing activity or campaign is active and being executed in the market. It is defined by a start date and an end date, and is used to plan and track the duration of marketing efforts.

### Investment plan

A detailed breakdown of planned marketing spend, including categories, sub-categories, line items and placeholders. Used to track and manage marketing investments.

## K

### Key Performance Indicator

A measurable value that demonstrates how effectively a company is achieving key business objectives (KPI).

### Key Result

A measurable outcome that defines the achievement of an objective.

### KPI

A measurable value that demonstrates how effectively a company is achieving key business objectives (Key Performance Indicator).

## L

### Line item

An individual marketing investment or expense within an investment plan.

## M

### Marketing Qualified Lead

A lead that has been deemed more likely to become a customer compared to other leads based on lead intelligence and engagement activities (MQL).

### MQL

A lead that has been deemed more likely to become a customer compared to other leads based on lead intelligence and engagement activities (Marketing Qualified Lead).

### Multi-Touch Attribution

A method of marketing measurement that takes into account all the touchpoints on the customer journey, assigning fractional credit to each interaction.

## O

### Objective

A goal or aim that activities are designed to achieve, often organized at company, marketing, and team levels.

### Outbound Action

A feature that allows sending data from Spend to external systems.

## P

### Persistent ID

A unique identifier that remains consistent for an item across different fiscal years, allowing for multi-year tracking of campaigns and contracts.

### Persona

A semi-fictional representation of your ideal customer based on market research and real data about your existing customers.

### Pipeline

The total value of potential sales opportunities that a company is currently pursuing.

### Placeholder

An item used during planning to hold funds for future spend when specific investments have not yet been determined.

### PO

A document authorizing a purchase, typically imported from procurement systems. Used to track committed spend (Purchase Order).

### Purchase Order

A document authorizing a purchase, typically imported from procurement systems. Used to track committed spend (PO).

## Q

### Quick Entry Form

A streamlined form for entering key data when creating a new line item.

## R

### Return on Investment

A measure of the profitability of an investment, calculated by dividing the benefit (return) by the cost (ROI).

### Return on Marketing Investment

A metric used to measure the effectiveness of marketing activities in terms of revenue generated (ROMI).

### ROI

A measure of the profitability of an investment, calculated by dividing the benefit (return) by the cost (Return on Investment).

### Roll-Up

An aggregation of data from lower levels of a hierarchy to higher levels.

### Rollover

Process of transitioning marketing plans, budgets, and data from one fiscal year to the next. This typically involves creating a new hierarchy for the upcoming year, potentially copying over certain elements from the previous year, and making necessary adjustments to align with new goals and strategies.

### ROMI

A metric used to measure the effectiveness of marketing activities in terms of revenue generated (Return on Marketing Investment).

## S

### Scenario Tag

A label used to create alternate budget scenarios, such as increased or decreased spending.

### Strategic Alignment

The process of linking marketing investments and activities to overall business objectives and strategies.

### Summary View

A view that shows planned inquiries and planned revenue of activities.

## T

### Target

The amount of money that marketing plans to spend on a specific scope, usually given in quarterly amounts.

### Target Group

A specific segment of consumers who are the most likely to buy a company's products or services. This group shares common characteristics that make them more likely to purchase, such as demographics, interests, and behaviors.

### Timeline View

A visual representation of activities on a calendar, showing their in-market periods.