# Lumina Plan Management – Allocations - In line editing



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#### **Overview**

The allocation tool allows users to allocate cost expenses or KPI values across a particular time period. Users can use this tool for any field that has to the right of the field.

### 1. Adding allocations to flight bars

- 1. In the Edit Mode of your Flowchart, click View vendor details.
- 2. Choose Flight Bars from the Customize drop-down menu.



3. Choose a value, e.g., Impressions from the Field drop-down menu.

now these fields in the flight	bars		
elect Field and Attributes		1 item selected	Remove All
Field	Select or start typing	Clicks: Calendar, Monthly, Allocated	-
	im		
	Column Centimeters		
	Column Millimeters		
	Impressions	]	
	Media Plan: Plan Custom Decimal 1		
Show Flight Bar Data Column	Media Plan: Plan Custom Decimal 2		
	Media Plan: Primary Target Audience		

4. Check the box next to the **Allocated** checkbox.

Show these fields in the flight bars						
Select Field and Attributes						
Field	Impressions	*				
Calendar / Fiscal	Calendar	•				
Date Division	Monthly	•				
Allocated						
Click Add.						

### 2. Using the in-line allocation editor

5.

You can edit the allocations for a single field via the following steps.

1. Click any of the impression numbers for a vendor detail to open the in-line allocation editor.

\$106,000.00	昺		5				,,,,,,,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
\$106,000.00	83	<u>83</u>	83	83	83	83	83	83	83	83	83	83
		\$5	<b>}04</b> .				,333			\$2	9,76	1.90
		0	lick	s: 83	- A	loca	ted	00				

2. In order to make a change, select one of the following allocation modes from the drop-down.

	Auto Daily	₼			Q1 18			
	Weekly	Total	W1 JAN 1	W2 JAN 8	W3 JAN 15	W4 JAN 22	W5 JAN 29	W6 FEB 5
Clicks	Monthly	1,000	83	83	83	83	83	83
Cost to Clie	Quarterly	\$106,000.00	\$8,833.33	\$8,833.33	\$8,833.33	\$8,833.33	\$8,833.33	\$8,833.33

- Auto: Automatically allocates field values. Choosing this option disables your ability to allocate as Lumina does it for you automatically. (Defaults to an even weekly split)
- Daily: Allocate by day.
- Weekly: Allocate by week.
- Monthly: Allocate by month.
- Quarterly: Allocate by quarter.
- 3. The single fields are now editable. Click into a field and make necessary changes.

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llocation Mode:	Weekly 🔻							
	Total	W	JAN 1	W2 JAN 8	Q1 18 W3 JAN 15	W4 JAN 22	W5 JAN 29	W6 FEB 5
Clicks		,000 -	85	83	83	83	83	110 1200
Cost to Client	\$106.0		\$8,833.33	\$8,833.33	\$8,833.33	\$8,833.33	\$8,833.33	\$8,833
4								
								Save

Depending on the entered values, the **Total** field will be highlighted in **red**, giving the following options to choose from.

Alloo	Allocation Mode: Weekly								
		Total							
	Clicks	1,000 👻							
<b>▲</b>	Redistribute difference of (2) evenly Redistribute difference of (2) as weighted Apply to total Revert Change								

- distribute allocations evenly or
- distribute weighted
- Apply to total
- Revert Change

Keep in mind that the allocations must add up to the field's total. If the allocations exceed or don't add up to the total the **Total** cell will be highlighted in **red**.

\* If you choose any option, other than Auto, you can cut, copy, and paste cells. You can click and drag an amount to other cells to fill those cells with the same amount. You can also copy and paste cells from Microsoft Excel into the grid.