

Universal Planner Quick Start Guide

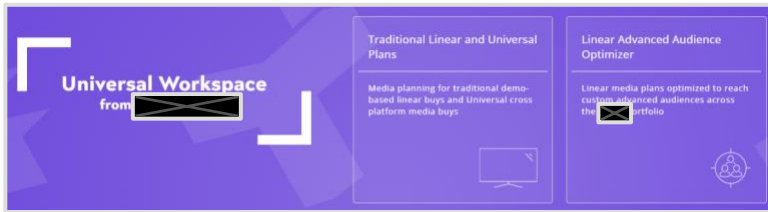
This Universal Planner Quick Start Guide demonstrates how to log in to Universal Planner, how to create and manage a plan, and how to view and filter plans.

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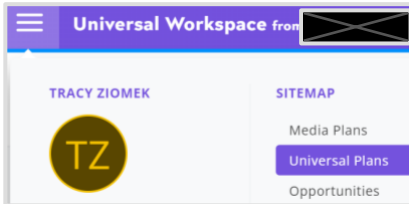
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Log in

Go the [UWS homepage](#) and click on the **Traditional Linear and Universal Plans** box.

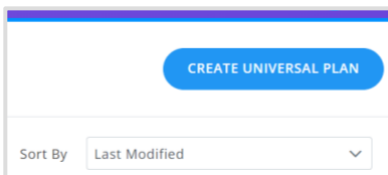


To begin working with universal plans, click on the **hamburger** menu and select **Universal Plans** under **Sitemap**.

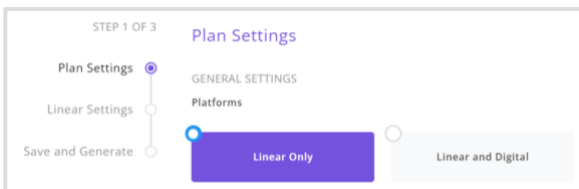


Create a universal plan

Click on the blue **Create Universal Plan** button at the top right.



- On the Plan Settings page, choose your plan and complete the required fields.
- Select **Linear Only** for linear plans.
- Select **Linear and Digital** for cross-platform plans.



Complete the **Team Roles** section and click **Continue**.

The image shows a form titled 'TEAM ROLES'. It has three sections. The first section is 'Sales Team' with a text input field containing 'Programmatic'. The second section is 'Account Executive' with a dropdown menu showing 'Levine, Brandon (206591113)'. The third section is 'Sales Planner' with a dropdown menu showing 'Ramos, Jolandy (206696726)'. At the bottom left is a blue button with a left arrow and the text 'BACK'. At the bottom right is a blue button with the text 'CONTINUE' and a right arrow.

Budget cards

For linear only plans, include the **Linear Budget**.

STEP 2 OF 3

Linear Plan Settings

Plan Settings

Linear Settings

BUDGET

Linear Budget

\$ 750,000

Click on the **Select Rate Card** tab and choose your rate card from the list.

Select Rate Card - Taco Bell 4Q22

Select Rate Card Create Rate Card

NAME	TYPE	PREMIUM	PROPERTY AVERAGES
☒ Test_DP	Upfront	150%	PropertyAverages.csv - 8/6/22, 1:54 PM
☐ Taco Bell_TestRC	Upfront	120%	PropertyAverages.csv - 8/6/22, 1:54 PM

- Click on the **Create Rate Card** tab,
- Name** your rate card and select **Upfront** or **Scatter** for rate card type.

Select Rate Card - Liberty Mutual 4Q22

Select Rate Card Create Rate Card

Name

Enter Rate Card Name

Type

☒ Upfront ☐ Scatter

Required Files

PropertyAverages.csv - 8/6/2022 1:54 pm

Select an upfront sales data file

Select Property Averages File

Select Upfront Sales Data File

Note: If you select **Scatter**, please add property averages. Click on **Select Property Averages File** to include the files.

Digital plan settings

For cross-platform plans, select either **ODV** or both and complete the associated fields.

STEP 3 OF 4

Digital Plan Settings

Plan Settings

Linear Settings

Digital Settings

Save and Generate

PLATFORMS

☒ ODV ☒ Peacock

Budget (Gross)

CPM (Gross)

Frequency Cap

Device Type Exclusions

Vertical Exclusions

Longform Mix (optional)

Shortform Mix (optional)

Spot Duration Mix

Min % Max %

15 30

31-45 46-60

61-90 91-120

- For  enter the same **CPM (Gross)** for ODV and  but split the **Budget (Gross)** evenly between the two.
- Frequency caps default to **2 Per Hour** and **4 Per Day**.
- Spot Duration Mix** must add up to 100%.

Benchmark Budget (Gross) (optional)	\$ Enter Benchmark Budget	\$ Enter Benchmark Budget
Benchmark CPM Gross (optional)	\$ Enter Benchmark CPM	\$ Enter Benchmark CPM

[< BACK](#)
[CONTINUE >](#)

Note: Benchmark options are available if needed but not required.

Click **Continue**.

(Optional) benchmarks

To generate a benchmark, complete the fields below **1. Enter Benchmark Settings**.

Generate Benchmark

1. Enter Benchmark Settings

Budget

\$ 750,000

Advertiser

Taco Bell

Brands (optional)

Select Brands

Quarter

4Q22

Start Date

09/26/2022

End Date

12/29/2022

Under **2. Select Plans** check or uncheck the boxes to include or exclude selling names from the benchmark.

Generate Benchmark

1. Enter Benchmark Settings

8750,000, Taco Bell, 4Q22

2. Select Plans

14 of 14 plans selected

Search Plans

Working Speculative Working Most Likely Broadcast Upfront

ORIGINAL PLAN ID	PROPERTY	PLAN NAME #	PLAN STATUS	MARKETPLACE
☒ 1285576	Bravo	Taco Bell 2022-23 Broadcast Upfront Bravo	Working Most Likely	Broadcast Upfront
☒ 1285530	Cheddar	Taco Bell 2022-23 Broadcast Upfront Cheddar	Working Most Likely	Broadcast Upfront

View your plan

You can toggle between **Linear**, **Digital**, and **XP** summaries for cross-platform plans.

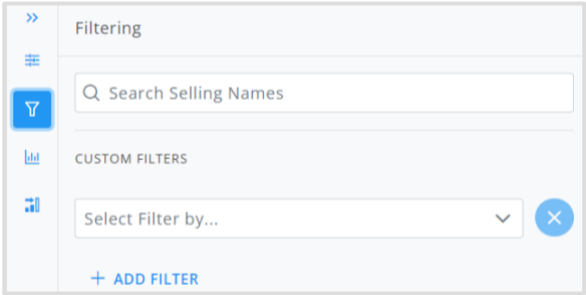
Linear		Digital	XP
REACH		(000)	TRPS
28.26M 22%		53,638	53.7
TARGET AUDIENCE			
DEX	CPM	REACH (%)	(000)
77	\$14.90	21.66%	53,638
32	\$18.48	15.75%	43,238

Click in any box to view detailed information about the selling name (e.g., target and demo audiences, rate card information, CPM, confidence score, etc.).

Filters

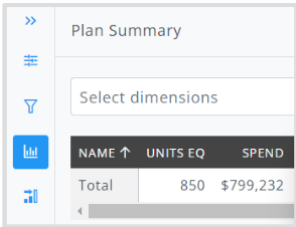
Click on the filter icon and the **Filtering** panel opens.

Type in the **Search Selling Names** search bar and/or click on the **Select Filter by...** drop-down to choose custom filters.

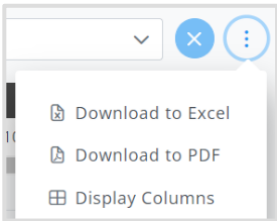


Summaries

Click on the plan summary button at the left to view your **Plan Summary**.



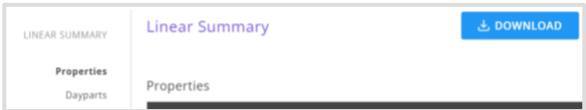
Click on the vertical ellipsis button, select **Display Columns**, and choose your columns to create custom summary tables.



- Select **Download to Excel** or **Download to PDF** to export your summaries.
- Click the **Select dimensions** drop-down to choose the criteria for your Custom Breakdown.



Click on the blue **Download** button to download the entire linear summary.



Benchmark comparison

Click on the benchmark icon to view and compare plan and benchmark estimates as well as percentage variance.



Benchmark Comparison

Total Plan

TOTAL ↑	PLAN	BENCH.	+/-	%
(000)	53,638	43,238	+10,400	+24.1%
CPM	\$14.90	\$18.48	-\$3.58	-19.4%
Frequency	1.9	2.1	-0.21	-9.8%

Click on the **Total Plan** drop-down to view the estimates at different levels (e.g., total plan, properties, daypart, week, etc.).