

# Budget Allocation

Epic	
Document status	DRAFT
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Designer	Nicole Fasula
Developers	
QA	

## Goals

User will be able to make budget allocations in AMP.

## Rules

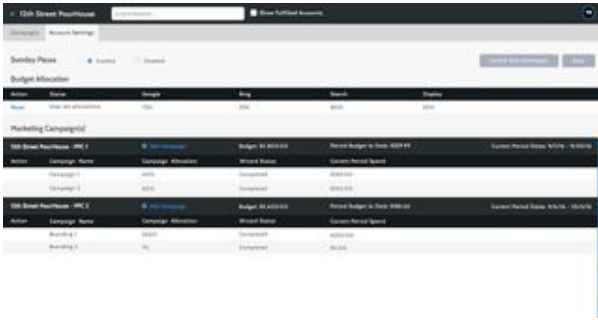
- If more than one marketing campaign (or focus) budgets are needed, they will be created through a support process (TBD)
  - A marketing campaign equals one or more Salesforce OLI's
  - An Advertiser can have multiple marketing campaigns
- Budget allocation refers to the percentage of the total budget that will be spent on each channel and network, these are set at the Advertiser level
- Budget allocations cannot be edited until an Advertiser has marketing campaign(s) in a status of completed
  - Budget allocations can be edited on the account settings tab in AM1
  - User can reset budget allocations to AMP system defaults
- Date selection drop down will be hidden (not removed) on the account settings tab
- Campaign allocation refers to the percentage of each budget allocation a campaign has the opportunity to spend related to it's marketing campaign
- Budget allocations can be set from 1% to 99% by the user.
- Campaign allocations can be set from 1% to 100% by the user.
- Campaign allocation will automatically be set to 100%, but can be edited by the user before a new campaign is launched
  - User can also edit campaign allocations in the account settings tab after launch
- Marketing campaign budget displayed includes credits and any previous liability
- All updates made to Account Settings will be applied by clicking the Save or Launch All Campaigns button, and then clicking the Publish button
  - Edits made to budget and campaign allocations can be saved/published at any time

*\*Update - 10/25 decision was made that budget allocations can only be set from 1% to 99% and campaign allocations can only be set from 1% to 100%. Future development may include the user being able to set it to 0% and the platform automatically pausing it.*

- *If an allocation is set to 0%, AMP will automatically pause the campaign*
  - *If user changes the allocation percentage to > 0%, AMP will automatically unpause campaign*
  - *User cannot pause/unpause campaigns*
  - *Any allocation changes made will go into affect the next day*
  - *AMP will not reallocate remaining % when allocation is set to 0%, user will do this manually*

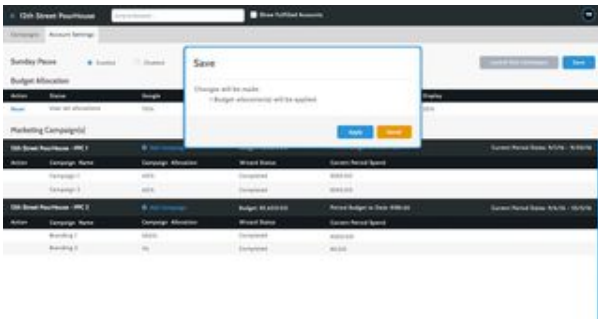
## User Scenarios - AM1

- View Budget Allocation for Channel and Network
  - When a user navigates to the advertiser account settings tab they will now see the following information (once a new build wizard is in the status of completed):
    - Budget allocations for channel and network, and status for the allocations
    - Marketing campaigns for the advertiser including marketing campaign, current period dates, budget, campaign name, campaign allocation, wizard status, current period spend, and period budget to date



- Edit Budget Allocation for Channel and Network

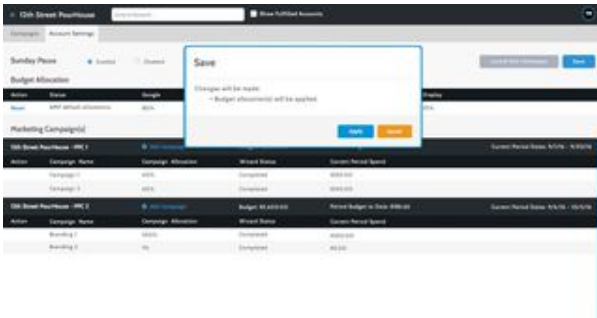
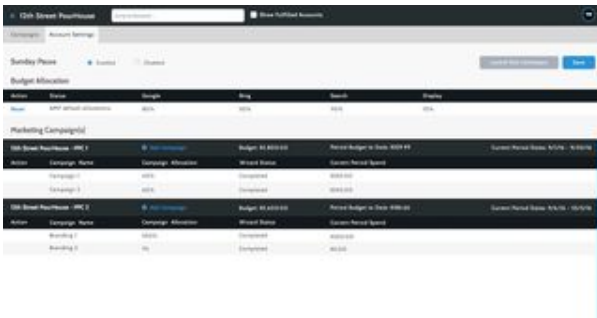
- When a user double clicks on each channel or network percentage in the budget allocation grid, the amount will become editable.
- Once edited the Save button will be enabled and turn blue, and the status will now show as "User set allocations".
- The user must click Save to apply the new allocations. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
- When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.



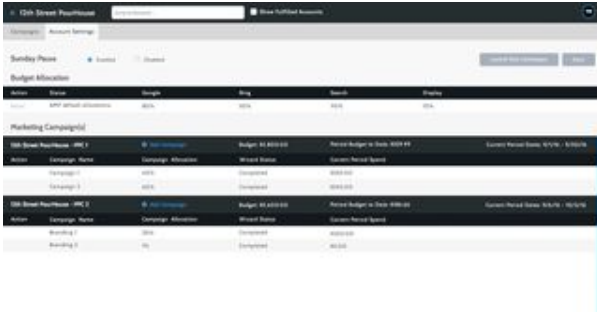
- Reset Budget Allocation to AMP defaults for Channel and Network

- When a user clicks the blue Reset link, all budget allocations will be reset to the AMP system default allocations.
- Once reset the Save button will be enabled and turn blue, and the status will now show as "AMP default allocations".
- The user must click Save to apply the new allocations. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
- When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.

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- After Save the reset button will turn grey and be disabled until the user changes the budget allocations.



- Edit Campaign Allocations associated with a Marketing Campaign (completed and new)
  - When a user double clicks on each campaign allocation percentage in the marketing campaign grid, the amount will become editable. Once edited the Save button will be enabled and turn blue.
  - The user must click Save to apply the new allocations. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
  - When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.

Dashboard Account Settings

Sunday Phase  Enabled  Disabled

Budget Allocation

Adset	State	Length	Eng	Search	Display
Adset	Not set	30s	30s	30s	30s

Marketing Campaigns

Adset	Campaign Name	Current Allocation	Adset Status	Current Adset Spend	Current Adset State
Adset 1	Campaign 1	Completed	Completed	\$0.00	Completed
Adset 2	Campaign 2	Completed	Completed	\$0.00	Completed

Dashboard Account Settings

Sunday Phase  Enabled  Disabled

Budget Allocation

Adset	State	Length	Eng	Search	Display
Adset	Not set	30s	30s	30s	30s

Marketing Campaigns

Adset	Campaign Name	Current Allocation	Adset Status	Current Adset Spend	Current Adset State
Adset 1	Campaign 1	Completed	Completed	\$0.00	Completed
Adset 2	Campaign 2	Completed	Completed	\$0.00	Completed

Dashboard Account Settings

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Dashboard Account Settings

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Budget Allocation

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Adset 1	Campaign 1	Completed	Completed	\$0.00	Completed
Adset 2	Campaign 2	Completed	Completed	\$0.00	Completed

Dashboard Account Settings

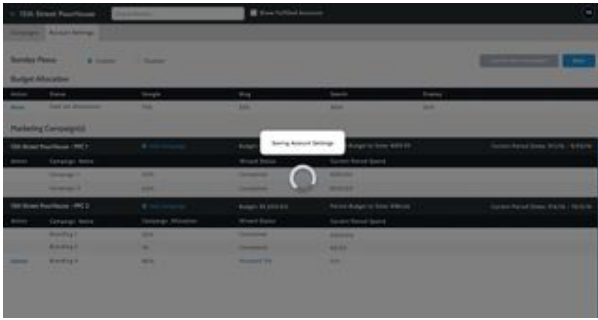
Sunday Phase  Enabled  Disabled

Budget Allocation

Adset	State	Length	Eng	Search	Display
Adset	Not set	30s	30s	30s	30s

Marketing Campaigns

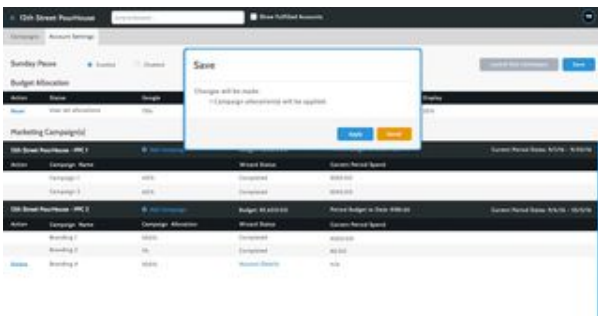
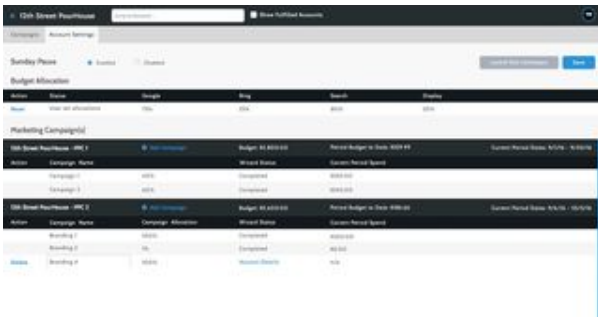
Adset	Campaign Name	Current Allocation	Adset Status	Current Adset Spend	Current Adset State
Adset 1	Campaign 1	Completed	Completed	\$0.00	Completed
Adset 2	Campaign 2	Completed	Completed	\$0.00	Completed

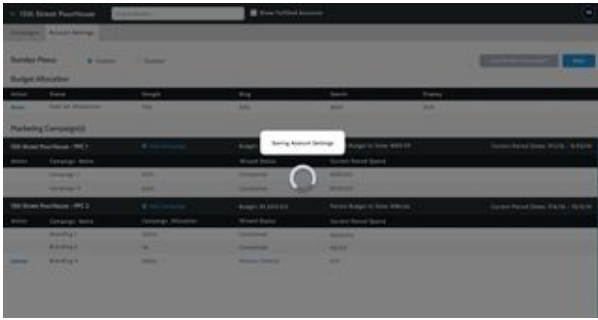


- Add new Campaign to a Marketing Campaign
  - When a user clicks the +Add Campaign link for a marketing campaign, a new row in the grid will appear. The user must provide a campaign name, but the campaign allocation will automatically be set to 100%, and the wizard status will be set to Not Started.
    - The user can change the campaign allocation to any amount between 1% and 100%.
  - The Launch New Campaigns button will remain grey until the wizard has been completed and is in a state of Accepted QA.

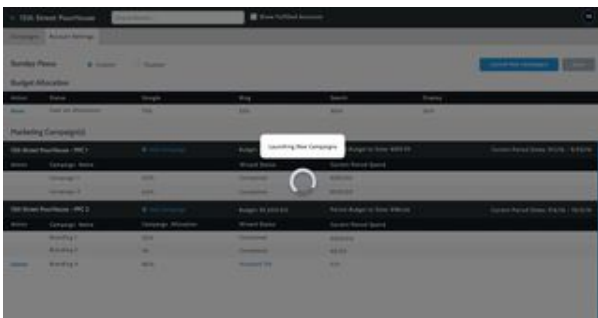
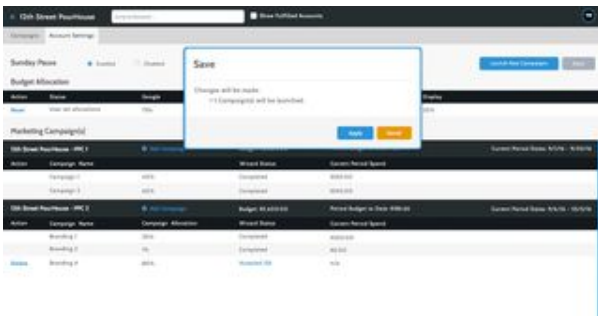
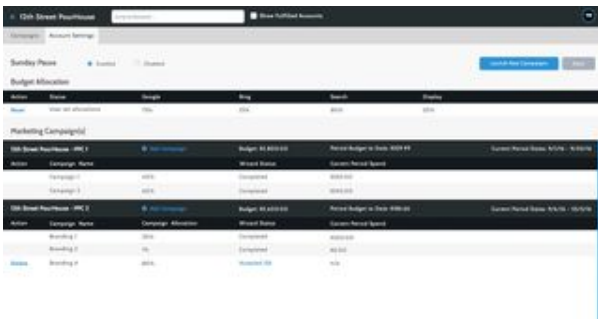


- Edit Campaign name for a new Campaign
  - When a user double clicks on the new campaign name in the marketing campaign grid, the name will become editable. Once edited the Save button will be enabled and turn blue.
  - The user must click Save to apply the new name. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
  - When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.

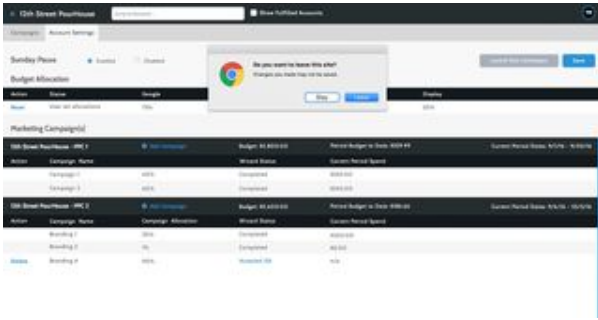




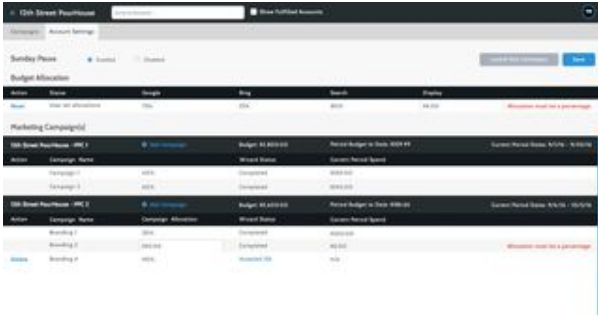
- Launch a new Campaign
  - When a user finishes all new campaign wizards, and each status is in a state of Accepted QA, the Launch New Campaigns button will turn blue.
  - The user must click Launch New Campaigns to transition the campaigns to fulfillment. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
  - When the apply button is clicked, an alert "Launching New Campaigns", and progress circle will appear until edits are saved. No other edits can be made during this time.



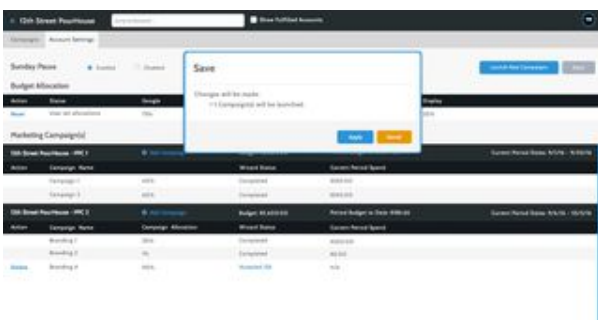
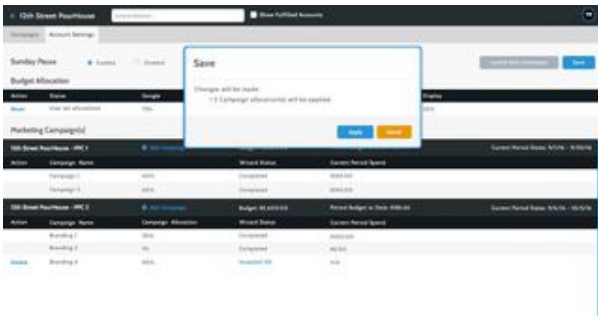
- Validations for Budget and Campaign Allocations
  - The user will lose changes if navigate away from page without saving, an alert will appear (telling the user that changes will not be saved), and buttons with the option to Stay or Leave must be chosen.



- The user must input budget and campaign allocations as a percentage. Red validation text will appear in the right side of the row which the validation failed. The validation will occur when the user clicks out of the field that was edited (on blur).

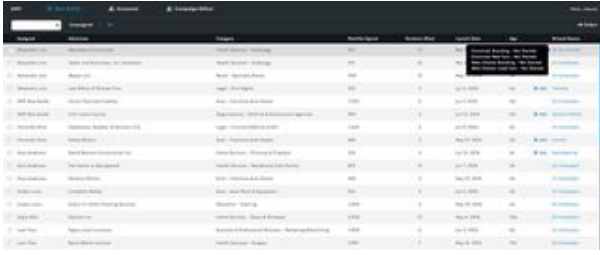


- When the user clicks the Save or Launch New Campaigns button, they will be presented with a modal including all changes that will be applied. The user must click Apply, or Cancel to continue editing.

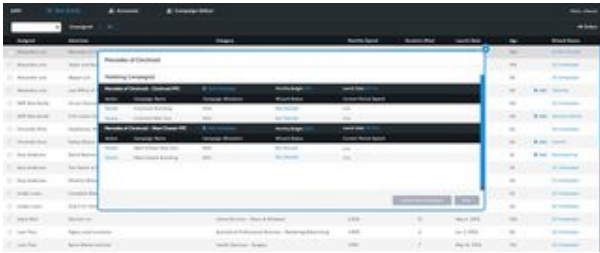


## User Scenarios - New Build Queue

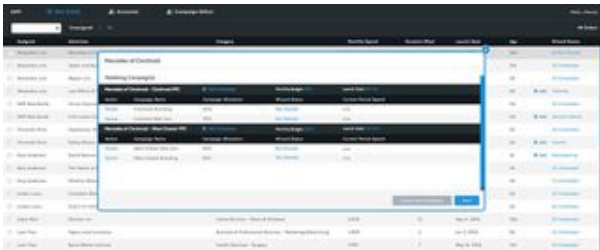
- View Campaign Allocations for Marketing Campaigns
  - When a user navigates to the new build queue and hovers over an Advertiser with multiple campaigns, they will now see a list of all campaigns and the wizard status each is in.
  - If all campaigns have the same status it will display the corresponding step in the Wizard (ie: (5) Not Started), if they don't have the same status it will show the number in parenthesis and "Campaigns" (ie: (5) Campaigns)



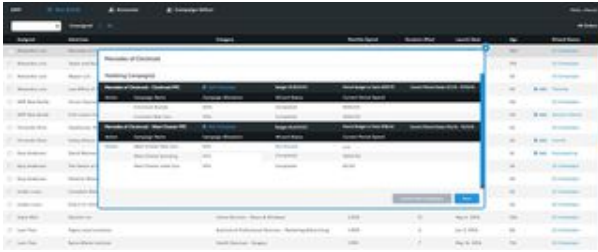
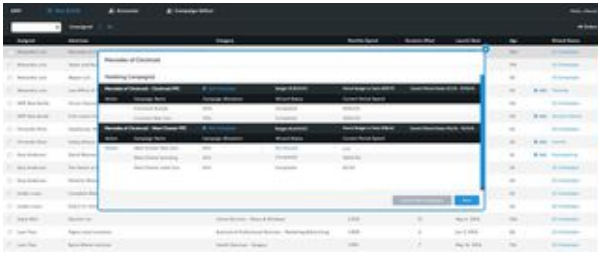
- When a user navigates to the new build queue and they click on a status, they will now see the following information in the modal when all campaigns have not launched (any status other than Completed):
  - Marketing campaigns with selections for launch date and monthly budget
  - Campaign names within a marketing campaign, campaign allocation, and wizard status



- Edit Campaign Allocations (new and completed)
  - When a user double clicks on each campaign allocation percentage in the marketing campaign grid, the amount will become editable. Once edited the Save button will be enabled and turn blue.
  - The user must click Save to apply the new allocations. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
  - When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.

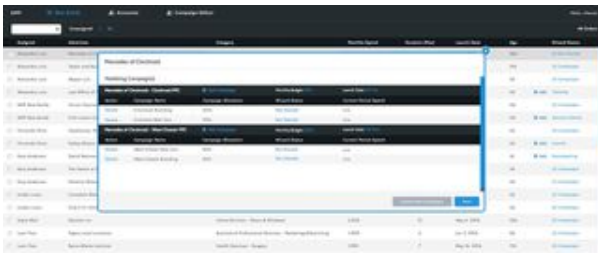






### Edit Campaign Name for a New Campaign

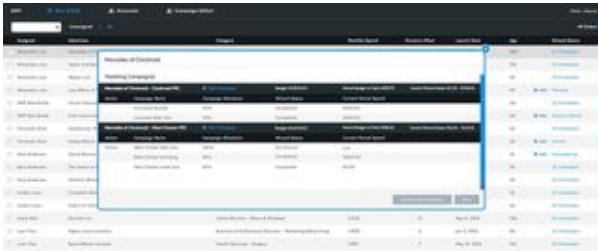
- When a user double clicks on the campaign name in the marketing campaign grid (only for campaigns with a status other than Completed), the name will become editable. Once edited the Save button will be enabled and turn blue.
- The user must click Save to apply the new name. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
- When the apply button is clicked, an alert "Saving Account Settings", and progress circle will appear until edits are saved. No other edits can be made during this time.





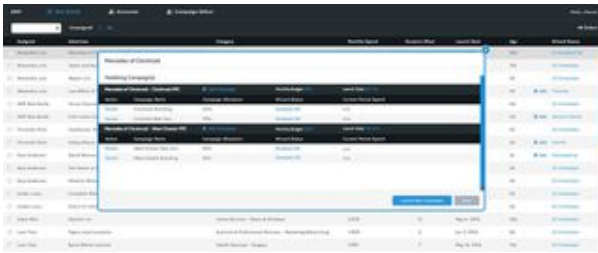
### Add new Campaign to a Marketing Campaign

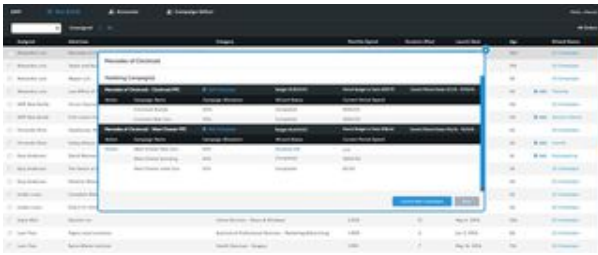
- When a user clicks the +Add Campaign link for a marketing campaign, a new row in the grid will appear. The user must provide a campaign name, but the campaign allocation will automatically be set to 100%, and the wizard status will be set to Not Started.
  - The user can change the campaign allocation to any amount between 1% and 100%.
- The Launch New Campaigns button will remain grey until the wizard has been completed and is in a state of Accepted QA.



### Launch a Campaign (new and completed)

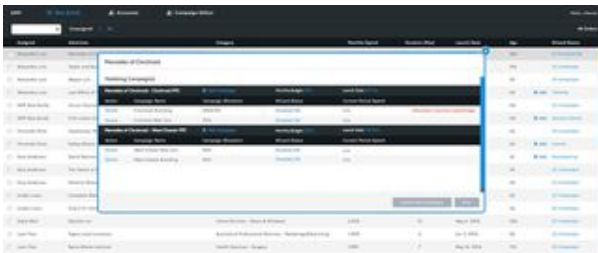
- When a user finishes all new campaign wizards, and each status is in a state of Accepted QA, the Launch New Campaigns button will turn blue.
- The user must click Launch New Campaigns to transition the campaigns to fulfillment. A modal will appear with the changes to be applied. The user can apply the changes or cancel.
- When the apply button is clicked, an alert "Launching New Campaigns", and progress circle will appear until edits are saved. No other edits can be made during this time.





### Validations for Campaign Allocations

- The user must input campaign allocations as a percentage. Red validation text will appear in the right side of the row which the validation failed. The validation will occur when the user clicks out of the field that was edited (on blur).




- The user will lose all campaign information setup in the wizard if they delete the campaign, an alert will appear (telling the user that all campaign content will be deleted), and buttons with the option for OK or Cancel must be chosen.
























- The user will lose changes if they close the modal without saving, an alert will appear (telling the user that changes will not be saved), and buttons with the option to Stay or Leave must be chosen.



### Attachments

File	Modified <sup>▲</sup>
>  AM1-3-Account-Settings-Reset-Budget-Allocation-Disabled-After-Save.jpg	Nov 02, 2016 by Nicole Fasula
>  AM1-3a-Account-Settings-Reset-Budget-Allocation-Save.jpg	Nov 02, 2016 by Nicole Fasula
>  AM1-6a-Account-Settings-Edit-Campaign-Allocation.png	Nov 02, 2016 by Nicole Fasula
>  NBQ-7-Add-New-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-4-Launch-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-10-Launch-New-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-11-Delete-New-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-12-Close-Modal-Without-Save.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-3a-Edit-Campaign-Name.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-8-Edit-New-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-9a-Edit-Existing-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-9-Edit-New-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-2a-Edit-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-6-Launch-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-5-Validation-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-4a-Launch-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-Budget-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-3-Edit-Campaign-Name.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-Budget-Campaign-Allocation-In-Fulfillment.psd	Nov 03, 2016 by Nicole Fasula
>  NBQ-Budget-Campaign-Allocation	Nov 03, 2016 by Nicole Fasula
>  NBQ-2-Edit-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-1-View-Campaign-Allocation.jpg	Nov 03, 2016 by Nicole Fasula
>  NBQ-0-View-Hover-Multi-Campaign.jpg	Nov 03, 2016 by Nicole Fasula
>  AM1-3-Account-Settings-Reset-Budget-Allocation.jpg	Nov 04, 2016 by Nicole Fasula
>  AM1-4a-Account-Settings-Edit-Campaign-Allocation-Save.jpg	Nov 04, 2016 by Nicole Fasula
>  AM1-3-Account-Settings-Reset-Budget-Allocation-Publish.jpg	Nov 04, 2016 by Nicole Fasula
>  AM1-4-Account-Settings-Edit-Campaign-Allocation-Publish.jpg	Nov 04, 2016 by Nicole Fasula
>  AM1-2-Account-Settings-Edit-Budget-Allocation.jpg	Nov 07, 2016 by Nicole Fasula
>  AM1-1-Account-Settings-Budget-Allocation.jpg	Nov 07, 2016 by Nicole Fasula
>  AM1-2a-Account-Settings-Edit-Budget-Allocation-Save.jpg	Nov 07, 2016 by Nicole Fasula

- ›  AM1-2-Account-Settings-Edit-Budget-Allocation-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-4-Account-Settings-Edit-Campaign-Allocation.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6c-Account-Settings-Edit-Campaign-Allocation-Save.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6a-Account-Settings-Edit-Campaign-Allocation-Save.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6a-Account-Settings-Edit-Campaign-Allocation.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-5-Account-Settings-New-Campaign.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6b-Account-Settings-Edit-Campaign-Name-Save.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6-Account-Settings-Edit-Campaign-Name-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-6-Account-Settings-Edit-Campaign-Name.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-7a-Account-Settings-Launch-Campaign.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-7-Account-Settings-Launch-Campaign-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-7-Account-Settings-Launch-Campaign.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-8-Account-Settings-Validation-Lose-Changes.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-9-Account-Settings-Validation-Allocation.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-11-Account-Settings-Validation-Launch-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  AM1-10-Account-Settings-Validation-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  NBQ-2-Edit-Campaign-Allocation-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  NBQ-9-Edit-New-Campaign-Allocation-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  NBQ-3-Edit-Campaign-Name-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  NBQ-4-Launch-Campaign-Publish.jpg Nov 07, 2016 by Nicole Fasula
- ›  NBQ-10-Launch-New-Campaign-Publish.jpg Nov 07, 2016 by Nicole Fasula

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