Did you know...

In v10.5 software, Planner can import/export goals between multiple Planner docs (or edit goals using Excel).

Planner can copy your goals from one Planner doc to another Planner doc (rather than manually recreating goals from scratch).

This is useful when 2 Planner docs have the same (or similar) goals. i.e., using last year's goals as a template for the follow year's goals or using General Market goals as a template for ethnic goals.

A. Click on the arrow to the left of **Manage Goals** and choose **Goal Management**.

B. Click **Import/Export Goals** and **Write goals to CSV file…** to export goals.

C. Global settings you've set in Planner will appear at the top of the CSV file.

D. The Selected Daypart Codes and Encompassing Dayparts you've set in Planner will appear next.

E. Each individual goal set is included in the CSV file. The Week Type setting is based on the dates used.

In this example, all dates are Mondays, thus Mon-Sun weeks were used for goals.

F. If you've set different goals per week in a goal set, those will be included.

To import goals into another Planner doc, open that doc, repeat steps A and B, but click ***Read goals...*** *to import goals.*

A. Manage Goals → Goal Management...

B. Import/Export Goals ▶ — Read goals from CSV file... / Write goals to CSV file...

C. Goal Properties — Target Demo: M18-49 — Cost Type: ● CPP ○ CPM ☐ Use pennies — Automated Mix method ▶ — Distribute with Smart-Blend

D. Selected Daypart Codes:

Daypart Code	Spot Len	Encompassing Daypart
AM	any	MF 5-10a
MD	any	MF 10a-3p
PM	any	MF 3-7p
WKND	any	SS 5a-12m

Goal Properties — Week type: ● Mon-Sun ○ Sun-Sat

Individual goal sets:
[Easter]
[Father's Day]
[Memorial Day-Custom]
[Memorial Day-Traditional]
[Memorial Day-Unwired]
[Mother's Day]

E.

F.

	A	B	C	D
1	GOALDATA	VALUE		
2	TargetDemo	M18-49		
3	CostType	CPP		
4	MixMethod	Blend		
5	UsePennies	No		
6				
7	DPC	SPOTLENGTH	DAYPART	
8	AM	any	MF 5-10a	
9	MD	any	MF 10a-3p	
10	PM	any	MF 3-7p	
11	WKND	any	SS 5a-12m	
12				
13	GOALSET	VALUE		
14	Campaign	Easter		
15	Classification			
16				
17	GOALPERIOD	WEEKS	WEEKLYGRP	WEEKLYCOST
18	4/3/2017	2	45	$75,000.00
19	MIX	PCT	CPP	
20	AM	25%		
21	MD	25%		
22	PM	25%		
23	WKND	25%		
24				
25	GOALSET	VALUE		
26	Campaign	Father's Day		
27	Classification			
28				
29	GOALPERIOD	WEEKS	WEEKLYGRP	WEEKLYCOST
30	5/29/2017	1	10	$17,000.00
31	MIX	PCT	CPP	
32	AM	25%		
33	MD	25%		
34	PM	25%		
35	WKND	25%		
36				
37	GOALPERIOD	WEEKS	WEEKLYGRP	WEEKLYCOST
38	6/5/2017	2	40	$72,000.00
39	MIX	PCT	CPP	
40	AM	30%		
41	MD	30%		
42	PM	30%		
43	WKND	10%		