# Business Requirements Document (BRD)

## Feature: Media Plan Lookup for Searching & Switching Plans within Media Plan Screen

Module: Media Plan

System: Nexelus

## 1. Purpose

Currently, users must exit the Media Plan screen to load a different media plan, either by returning to the Campaign screen or using the Media Plan search screen. This creates inefficiencies, particularly when users need to switch between multiple plans frequently.  
  
To improve workflow efficiency, this enhancement introduces a Media Plan Lookup next to the Media Plan Name field. This lookup will allow users to search for media plans across different campaigns, quickly select a plan, and switch to it without leaving the current screen.

## 2. Business Need

- Faster Navigation: Users will no longer need to leave the Media Plan screen to switch to another plan.  
- Enhanced Searchability: Users can search for media plans across all campaigns instead of being restricted to the current campaign.  
- Improved User Experience: Reduces unnecessary clicks and streamlines navigation, especially for users handling multiple plans.

## 3. Proposed Solution

- Add a Media Plan Lookup Icon in front of the Media Plan Name field.  
- When clicked, the lookup will open a searchable modal that allows users to:  
 ✅ Search for media plans by Name, Campaign, Date Range, Status, or Owner.  
 ✅ View plan details before selecting (e.g., campaign name, last updated date).  
 ✅ Select a media plan and immediately load it in the current screen.  
- If the user has unsaved changes, the system will prompt them to save or discard before switching plans.  
- The search should support large datasets and allow quick filtering through server-side queries.

## 4. Functional Requirements

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| Requirement ID | Description |
| FR-01 | A Media Plan Lookup Icon will be added next to the Media Plan Name field. |
| FR-02 | Clicking the icon will open a searchable modal where users can find media plans. |
| FR-03 | The lookup should allow users to search by customer, Project, level3, Media Plan Name, Campaign, |
| FR-04 | Selecting a media plan will immediately load it in the current screen. |
| FR-05 | If there are unsaved changes, the system will display a confirmation prompt before switching. |
| FR-06 | The system should not persist the selection across sessions. When the user reopens the Media Plan screen, it should load the last accessed plan as per current behavior. |
| FR-07 | The feature should not impact existing Media Plan functionalities like editing, approvals, or billing. |

## 5. UI/UX Considerations

- Lookup Placement: Positioned next to the Media Plan Name field for quick access.  
- Search Modal Design:  
 ✅ Search Filters: The modal will include input fields for Customer, Project, level3, Media Plan Name, Campaign.  
 ✅ Results Display: The search results will show Media Plan Name, Campaign Name, Created Date, Last Modified Date, and Owner.  
 ✅ Pagination & Performance: The search should support server-side pagination to optimize performance for large datasets.  
 ✅ Select & Load: Clicking a search result will close the modal and load the selected plan in the current screen.  
- User Prompt:  
 - If the user has unsaved changes, show a Save, Discard, or Cancel prompt before switching.

## 6. Non-Functional Requirements

- Performance:  
 ✅ Search results should load within 2 seconds for optimal user experience.  
 ✅ The system should implement server-side filtering to prevent slowdowns when handling large datasets.  
 ✅ Pagination should be implemented to limit search results per page.  
- Data Integrity:  
 ✅ Users should not lose unsaved changes unless they confirm.

## 7. Risks & Constraints

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| Risk | Mitigation |
| Users may accidentally switch plans and lose unsaved changes. | Add a confirmation prompt before switching. |
| Searching across all campaigns may cause performance issues. | Implement server-side search with pagination to optimize performance. |