



Pending: Clearing Pending

v3.0

There are several ways you can clear Pending revenue in *WO Sales*, meaning converting the revenue to won or lost business within the system.

Pending > Pending List

V	WO SALES - Pending & Revenue - Pending - Pending List 📀 👬 <table-cell> Administra</table-cell>												rator					
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	1	Р	Transaction	al ATB	Test		WTV-SC		Arden's Flowe	er Shop	Arden's F	lower Shop	06	/25/12	- 08/20	5/12		\$20,00

With in-line editing capabilities, you can select one or more Pending items at a time, and clear pending without the need to open each item individually, it can be done from the List screen.

- Click the Submit To Traffic button to push the Order to WO Traffic.
 - In the **Submit Orders** window, enter an optional comment, edit the Priority Code if necessary and click **OK**.
 - De-select the **Clear Pending Amount** box to keep dollars as pending on reports.
- Click the Set Sales Stage button to edit the sales stage or Close Probability %.
 - In the Sales Stage window select Closed Won or Closed Lost from the Sales Stage pull-down and click OK.

Note: The Close Probably % will automatically reflect the correct percentage based on the selection made in the Sales Stage field.

Submit Orders							
Per	nding: 1 ou	ut of2					
Descr	iption: The	e Dow Jones					
Ag	ency: Arno	old MPG/SF					
Adve	rtiser: Aeo	ba Music					
Com	iment:						
Priority	Code: Pric	io rity 9 👻					
Clear Pending An	nount: 🔽						
Mark As Closed	Won: 🔽						
Apply	to all: 🗌						
		OK Cancel					
Sales Stag	e						
	Pending:	1 out of 2					
	ld:	128					
C	escription:	ATB Test					
	Agency:	Arden's Flower Shop					
	Advertiser:	Arden's Flower Shop					
Per	nding Type:	Transactional -					
Si	ales Stage:	Proposal 🔻					
Close Prob	ability (%):	50 -					
A	Apply to all:						
		OK Cancel					

Budget & Forecast

	WO SALE	S • P	ending & Revenue	e → Budg	get & Fored	ast → Local	AE Budge	: Region/Al	E*			0	n	0	Administrat	tor
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ľ	Name				De	cember 2012			Total							
	nume				TY Budget	Pending	Wgt Pndg	TY Budget	Pending	Wgt Pndg	TY Budget	Pendi	ng	Wg	t Pndg	
	Local					\$160,000	\$64,000		\$480,00	\$192,000		\$4	481,97	3	\$193,47	79
	Budgeted				\$400,000	\$160,000	\$64,000	\$1,200,000	\$480,00	\$192,000	\$3,893,000	\$4	480,00	0	\$192,00	00
	🖃 John Murphy				\$400,000	\$160,000	\$64,000	\$1,200,000	\$480,00	\$192,000	\$3,893,000	\$4	480,00	0	\$192,00	00
	New Business								ſ	Pending Drill [lown					
	🗉 Unbudg	eted							-	Class Deadies	Dallara		\$1,97	'3	\$1,47	79
	Andrea VanWagner									Clear Pending	Dollars				C4 47	70

In the Budget & Forecast screen click in a Pending cell to trigger the **Pending Drill Down** pop-up. Click the Pending Drill Down option to open the Pending Drill Down window:

	WO SALES - Pending & Revenue - Budget & Forecast - Local AE Budget: F	Region/AE	0 /1	0	Admini	istrator					
Pending Drill Down (1 Cash Pending of John Murphy)											
4	Open New Pending Berposal Edit Edit Save Cancel Mark As Lost Clear Pendi	ng									
	Actions + 2 Pending 3	+									
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	Image: Superior Action Advertiser Agency Flight Dates Penn Image: Superior Action Advertiser Agency Flight Dates Q1 Q2 Q2	ding ^(*) Weighted Pending ^(*) 3 Q4* Q1 Q2 Q3 Q4* Pendin	Stage		%	Cash					
	🔽 🔞 찬 General Motors General Motors Campbell-Ewald 10/01/12-12/23/12	\$480,000 \$192,000 \$480,000 A	vail - Transa	ctional	40						

The Pending Drill Down window will display a list of pending items. Select one or more of the items in the pending list, and use the tool bar options.

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1. Edit – editable fields are indicated in blue. Enter new dollar amounts and/or probability percentages.

	Pending						Stage	%		
Oct	Nov	Dec	Q1	Q2	Q3	Q4	Period	Other	olage	
			\$1,973				\$1,973	\$118,027	Final Negotiation - Legacy	75
\$160,000	\$160,000	\$160,000				\$480,000	\$480,000		Avail - Transactional	40
\$160,000	\$160,000	\$100,000				\$400,000	\$400,000		Avail - Transactional	40

2. Click the Save or Cancel icons next to the pending item or in the Tool Bar to save or discard edits.

Note: Edits made here will update and be visible in the Pending item.

- 3. Mark as Order, Mark As Lost Business, Clear Pending Dollars each will appropriately affect the selected pending items.
- 4. Open will fully open the selected pending item where you can make edits to the full pending item.
- 5. Click the X in the upper right corner to exit the Drill Down window.

Home Page Dashlet

Му	My Open Pending											
				🔣 🕢 (1 - 3 of 3) 🗅 🕅								
ID 🔤	Name \Leftrightarrow	Advertiser \Leftrightarrow	Agency 🔤	Amount 🗘	Flight Start $\ \Leftrightarrow$	Order						
<u>84</u>	<u>Winter</u> SUV	General Motors	Campbell-Ewald	\$505,000.00	10/01/2012	√ Ø						
<u>88</u>	<u>Winter</u> Holidays	Las Vegas Conv. Bureau	FCB/SF	\$450,000.00	10/01/2012	v Ø						
<u>87</u>	Web	Comfort Sit & Sleep	Comfort Sit & Sleep	\$75,000.00	10/01/2012	V Ø						

Click the Order icons in your Pending dashlet to quickly update Pending items:

Mark As Order 🗹

Mark as Lost Business 🙋

Items **Submitted To Traffic** or **Marked As Order** will only be editable in *WO Traffic*.