



# **Saving and Sharing Report Templates**

# WO Sales v3.0

- In both the Sales Reports and Research Reports modules in WO Sales, you can save reports as • local (👜) or global (🎱).
- A local (
   <sup>(a)</sup>) report will only be accessible to you (and to admins).
- A global () report can be shared with other users at your station group.
- Sales Managers and can set up global Revenue, Pipeline, and Return/Non-Return report templates for Account Executives, with the following benefits:
  - **Consistent** all employees will look at the same report in the same way
  - o Save time AEs won't need to waste time setting up reports. Run the report as-is, or tweak it and re-save it.
- Research Directors can set up standard Master Planners, Rankers, and Trenders:
  - **Consistent** all employees see the same information in the same way

## **Saving a Global Report**

- Create and save a new report using the exact parameters you want AEs in your station group to • use.
- On the Sales Reports and Research Reports list views, scroll to the right to see a column with

icons indicating	WO CALES - Denting & Devenue	+ Sales Penorts + Al						0 #	
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 Within a New Sales Report pop-up window, you can also select "Share with all stations" to make the new report global (

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### **Viewing & Copying a Global Report**

- Account Executives can double-click to open any report tagged as global (
  - When AEs use the same global report, they all see data in the same way
  - o Security limits can be set so AEs only see their own revenue data
- Sometimes a global report template is almost what you need, but not quite
  - Tweak the global report, then save it under a new name
  - o AEs can use Configure or Report Options to tweak the report selections
  - Save time use the global report as a starting point, rather than building from scratch

#### **COPYING SALES REPORTS**

- Double-click to open the global report
- Select Configure
- Change the report selections
- Click Save As
- The report title will be changed to read "Copy of" the original report
- Change the name if you wish and click **Save**
- Or select the global report in the list view and click Copy

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#### **COPYING RESEARCH REPORTS**

- Double-click to open the global report
- Select Report Options
- Change the report selections
- Click Save As (not available in Master Planner reports)
- The report title will be changed to read "Copy of" the original report
- Change the name if you wish
- Click OK

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• Or select the global report in the list view and click **Actions > Copy** (not available for Master Planner reports)