

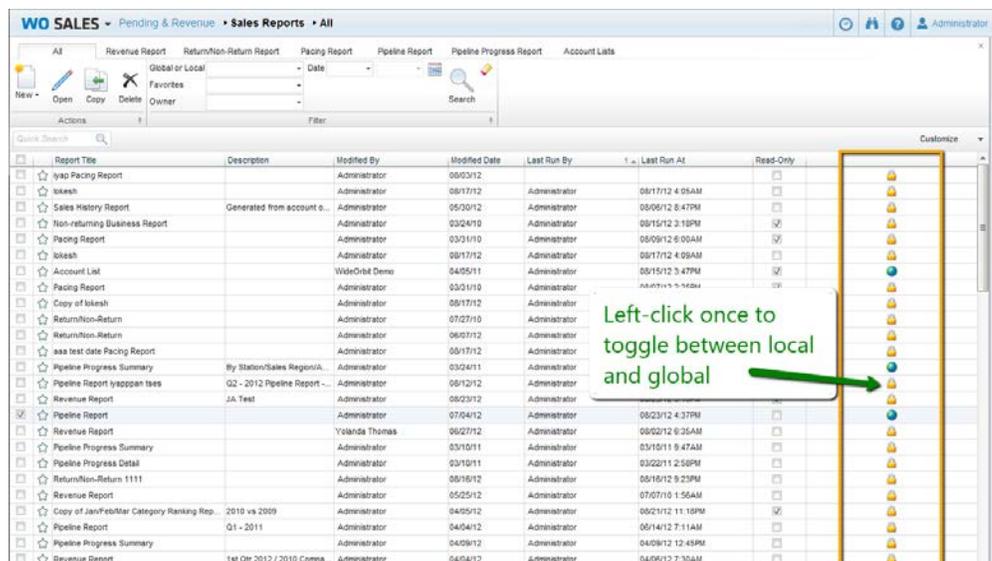
## Saving and Sharing Report Templates

### WO Sales v3.0

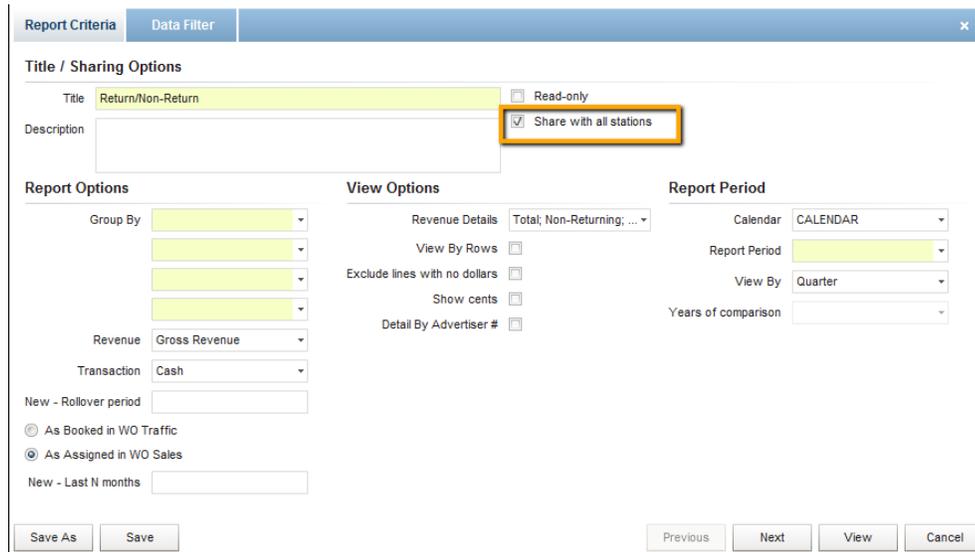
- In both the **Sales Reports** and **Research Reports** modules in WO Sales, you can save reports as local (🔒) or global (🌐).
- A local (🔒) report will only be accessible to you (and to admins).
- A global (🌐) report can be shared with other users at your station group.
- Sales Managers and can set 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
  - **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 if the saved report template is local (🔒) or global (🌐).
- Left-click once on a global icon to switch it to local. Left-click once more to switch it back to global.



- Within a **New Sales Report** pop-up window, you can also select “Share with all stations” to make the new report global (🌐).

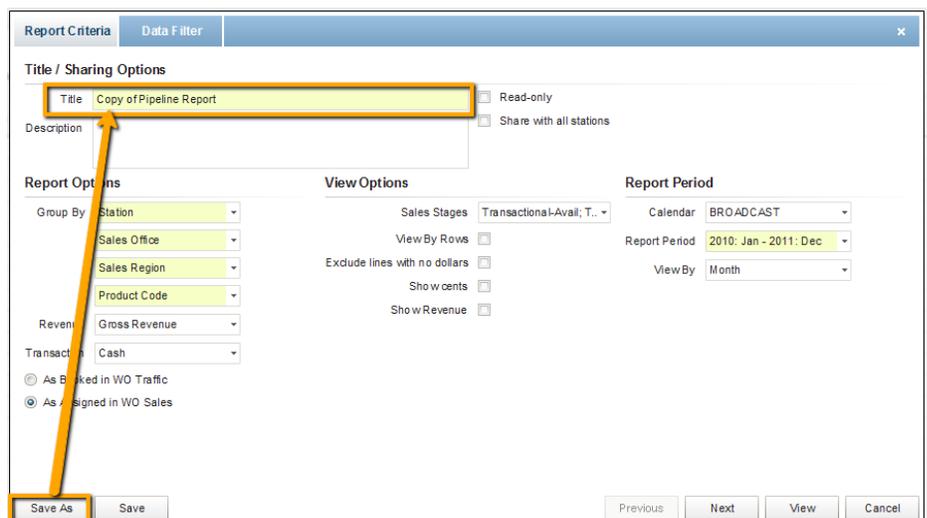


## Viewing & Copying a Global Report

- 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
  - 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
  - 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

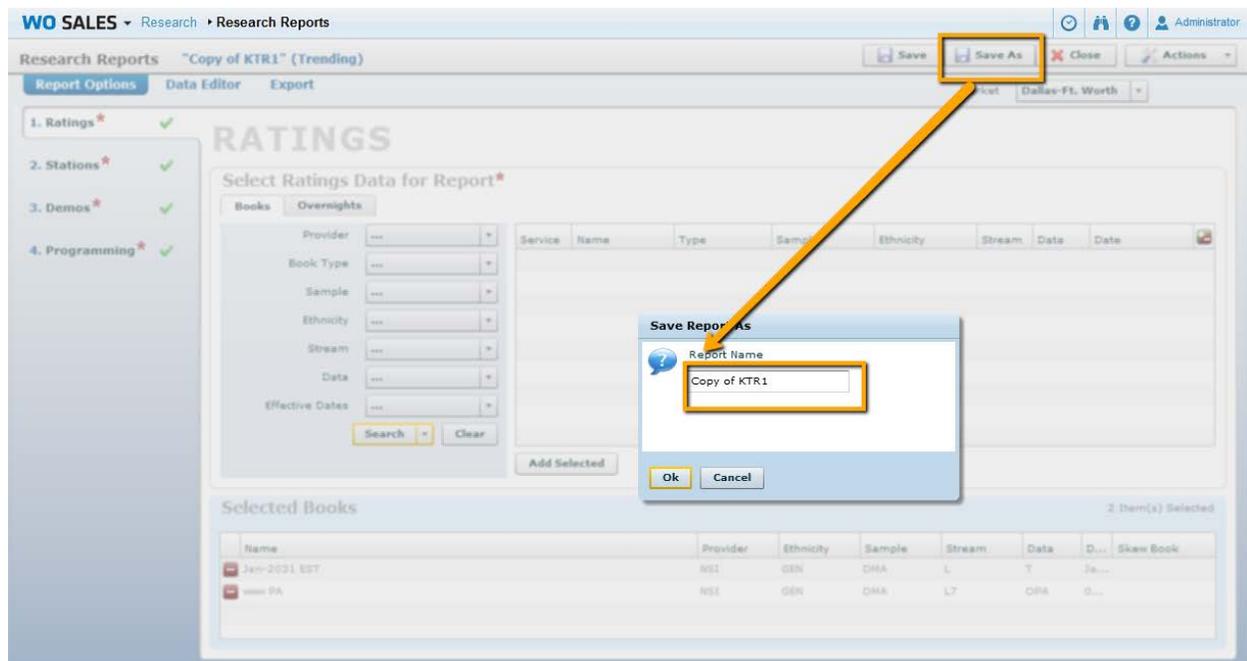
## COPYING SALES REPORTS

- 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**



## 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**



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