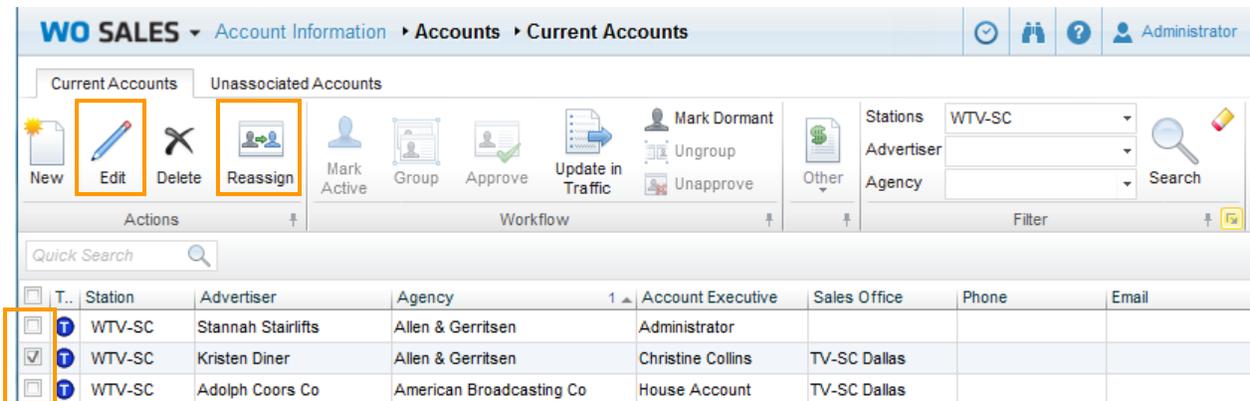


## Accounts: Editing

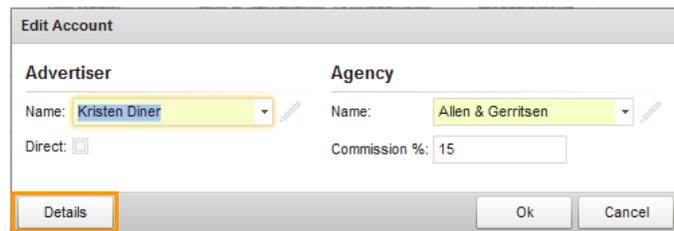
v3.0

Make edits to existing Accounts by selecting them on the Current Accounts tab, and clicking the **Edit** button or the **Reassign** button.



### Edit button

- Change the Agency commission percentage.
- Change the name of an Advertiser or Agency if the Account has not been submitted to *WO Traffic*.
- Click the Details button to access further Account details.



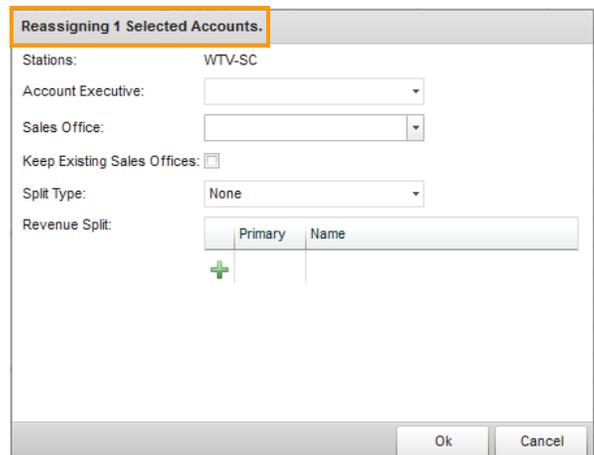
### Details Window

- Edit Addresses, Contact info, Station
- Change AE assignment or manage AE Splits
- Mark an account as Dormant, or de-select the dormant check box to make an Account active

### Reassign button

- Select an AE from the pull-down menu
- Change the associated Sales Office
- Opt to keep Existing Sales Offices when AE is changed
- Manage splits
- Select a Split Type and add AEs by clicking the Plus

*Note:* You can Reassign multiple Accounts at once.



## Direct Account to Agency Account

**Sales Account**  - an Account that has not been pushed to *WO Traffic*

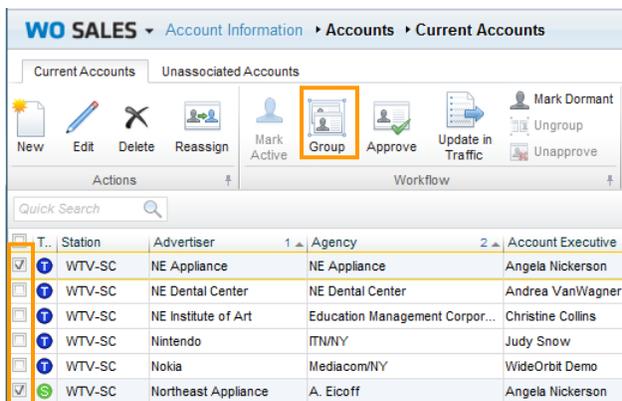
- Select the Account on the Current Accounts list
- Click the Edit button
- Un-check the Direct Account box
- Add the appropriate Agency to the Account
- Click the Ok button to save the change

**Traffic Account**  – an Account imported from or pushed to *WO Traffic*

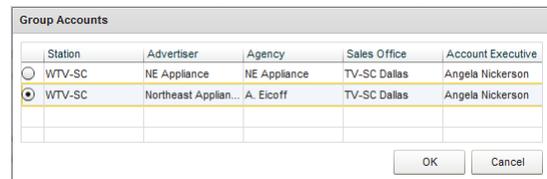
- Click the New button and create a new Agency Account using the Advertiser name and either an existing Agency or by creating a new Agency

*Note:* You can group Accounts under one master Account to keep a complete history for an Account. For example, a formerly Direct Account can be grouped with a new Agency Account.

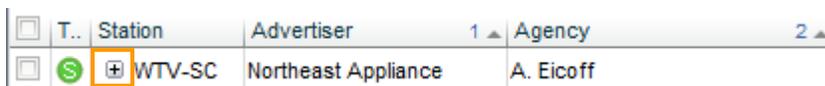
## Grouping Accounts



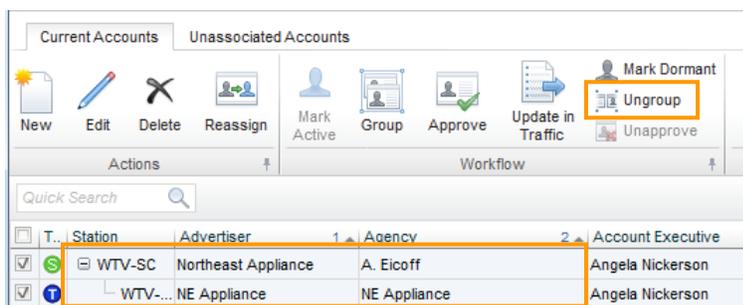
- Select two or more Accounts that should be Grouped together
- Click the **Group** button on the Ribbon
- Designate a **Primary** Account in the pop-up and click the **Ok** button to confirm



Grouped Accounts display on the Current Accounts tab together under the Primary Account.



- Click the + next to the Primary Account to view all Accounts in the Group



- To remove an Account from a Group, select it in the list and click the Ungroup button on the Ribbon