WO SALES



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.

V	WO SALES - Account Information + Accounts + Current Accounts										\odot	A	0	2	Administrator
(Curr	ent Accounts	Unassociated	Accounts											
*	4	/ ~		0		0		🔔 Mark Dormant		Stations V	VTV-SC	;		-	
				Mark	1		Undata in	📧 Ungroup		Advertiser				-	\checkmark
Nev	N	Edit Delet	e Reassign	Active	Group	Approve	Traffic	San Unapprove	Other	Agency				Ŧ	Search
		Actions	÷			Workt	low	+	Ŧ			Filter			+ 😡
Qu	ick	Search (2												
	Т	Station	Advertiser		Agency		1 🔺	Account Executive	Sales	Office	Phone			Ema	il
	D	WTV-SC	Stannah Stairlift	5	Allen & C	Gerritsen		Administrator							
\checkmark	D	WTV-SC	Kristen Diner		Allen & C	Gerritsen		Christine Collins	TV-SC	Dallas					
	D	WTV-SC	Adolph Coors C	D	America	n Broadcast	ing Co	House Account	TV-SC	Dallas					

Edit Account

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*.

Adver	tiser		Agency		
Name:	Kristen Diner	-	Name:	Allen & Gerritsen	-
Direct:			Commission %:	15	
Deta	ils			Ok	Cano

• 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.

Reassigning 1 Select	ed Accounts.					
Stations:	WTV-SC					
Account Executive:		*				
Sales Office:		-				
Keep Existing Sales Off	ices:	s: 🗖				
Split Type:	None -					
Revenue Split:	Primary Name					
	÷					
		Ok	Cancel			

Direct Account to Agency Account

Sales Account Sales 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 10 – 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

WO SALES - Account Information + Accounts + Current Accounts											
	Current Accounts Unassociated Accounts										
* Ne	w	Edit Delet	e Reassign Mark	Group Approve Update in Traffic	Mark Dormant						
		Actions	+	Workflow	+						
Q	uick	Search (2								
	Т.,	Station	Advertiser 1 .	Agency 2 🛦	Account Executive						
\checkmark	O	WTV-SC	Accounts Unassociated								
	O	WTV-SC	NE Dental Center	NE Dental Center	Andrea VanWagner						
	WTV-SC NE Institute of Art			Education Management Corpor	Christine Collins						
	O	WTV-SC	Nintendo	ITN/NY	Judy Snow						
	O	WTV-SC	Nokia	Mediacom/NY	WideOrbit Demo						
\checkmark	8	WTV-SC	Northeast Appliance	A. Eicoff	Angela Nickerson						

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

Gro	up Accounts				
	Station	Advertiser	Agency	Sales Office	Account Executive
\odot	WTV-SC	NE Appliance	NE Appliance	TV-SC Dallas	Angela Nickerson
\odot	WTV-SC	Northeast Applian	A. Eicoff	TV-SC Dallas	Angela Nickerson
				ОК	Cancel

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

[T	Station	Advertiser	1 🔺	Agency	2 🔺
[8		Northeast Appliance		A. Eicoff	

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

Curr	rent Accou	unts I	Unassociated	Accounts					
New	Edit	X	≜⇒ Reassign	Mark	Group	Approve	Update in	Mark Dormant	0
Quick	Act Search	ions Q	Ŧ	Adard		Work	flow	+	
🗆 T	Station	A	dvertiser	1.	Agency	,	2 🔺	Account Executive	
V S		-SC No	ortheast Appli	ance	A. Eicof	f		Angela Nickerson	•
V 🕕	– w	/TV NE	Appliance		NE Appl	iance		Angela Nickerson	-

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