WideOrbit

WO Sales Training Guide



Avails and Proposals

Editing Global and Weekly Rates

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Editing Global and Weekly Rates

Avails and Proposals allow you to view a single Global rate column or individual Weekly rate columns. Below is an overview of how to edit both during the Avail and Proposal process.

The rates that populate an Avail and Proposal come from the Rate Card that is selected. The system defaults how rates will be displayed. Avails will display a single Global rate and Proposals will display Weekly rates. Both of these rates can be managed in either the Header or the Workspaces of the Avail and Proposal at different points during the process.

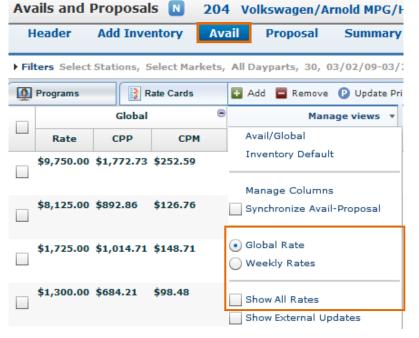


Header

In the Header, you can change the system displayed rate defaults by selecting the appropriate "radio button".

This area of the Header is also where you would select the rate cards you would like to attach to the Avail and Proposal.

*Note: Once you move from the Header to the Workspace, any changes made to the Rates can only be done from the Workspace of the Avail and Proposal.



Workspace

In the Avail and Proposal Workspace, Rate Views may be selected via the **Manage Views** drop down menu.

There is an option to display Global or Weekly rates depending on the selection made in the drop down.

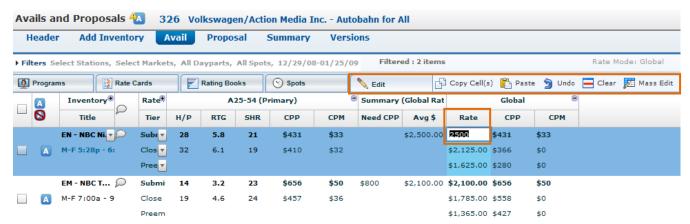
The Show All Rates checkbox will place a Global rates column in the view along with weekly rate columns.

*Note: If there is a rate missing, then that rate has not yet been entered in the rate card.



Global Rates

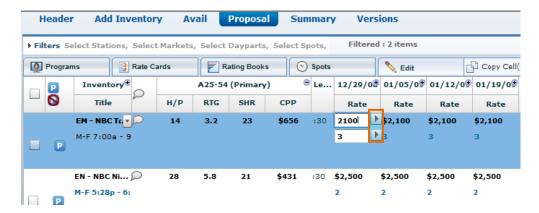
A Global rate is the highest rate found across all weeks of a schedule. It will be the one rate shown to a client when presenting an Avail. To edit a Global rate, click on the rate and type over the existing rate. Once you click enter you will see the CPP and CPM adjust accordingly. Additionally you may use the Edit tool bar options to adjust rates in the Avail and Proposal workspace.



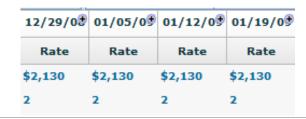
*Note: Changing a Global rate will not affect Weekly rates. Individual weeks will still hold their original rate found in the rate card.

Weekly Rates

Weekly rates are edited similar to Global rates. Click on the rate that you would like to adjust and then type over the existing rate. Clicking the rate cell in this area automatically makes the unit row of the line editable. Apply the new rate, as well as any unit adjustments, to all weeks on a line by using the arrow icon next to the appropriate cell. Each week may also be edited individually.



Manually entered weekly rates will display in blue, which serves as a visual clue that rates have been edited. Clients will not see that you have edited any rates in the printed version.



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