

WO Sales v1.6

WideOrbit
WO Sales Training Guide



Avails and Proposals

Exporting Avails and Proposals

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Exporting Avails and Proposals

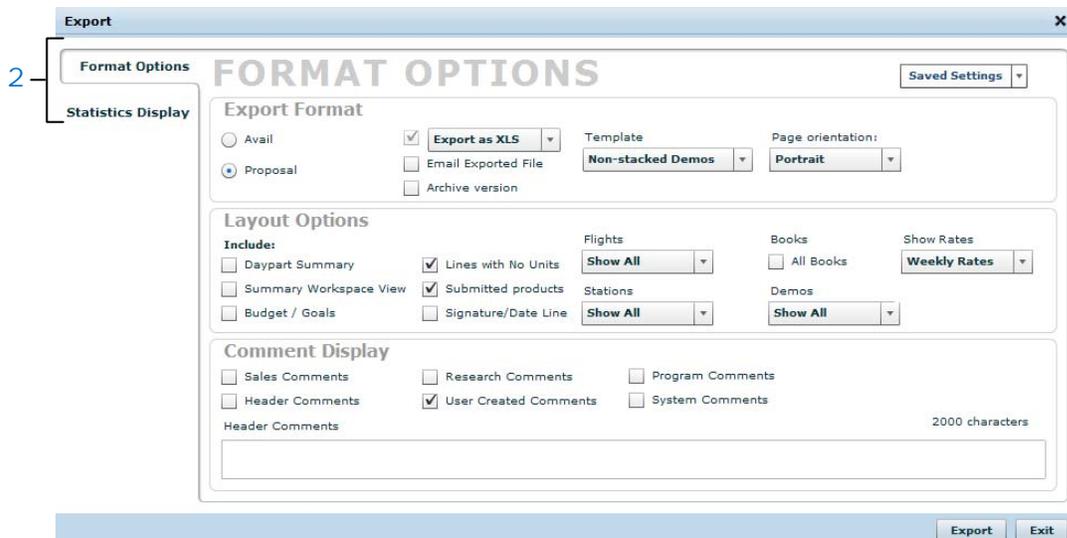
Avails and Proposals are exported throughout the negotiation process. *WO Sales* offers several options that allow you to decide how much detail to include in each export. The export screen is divided into two sections: **Format Options** and **Statistics Display**. This will guide you through exporting avails and proposals, explain **Format Options** and show examples of how the information is exported.

How to Export Avails and Proposals

- From the **Actions Menu** of an Avail or Proposal, select **Export** to open the Export Options screen.



- Choose the **Format Options** to include in the export. (*Format Options are explained on page 4*)
 - Select the **Avail** or **Proposal** radio button.
 - From the drop down menu, decide to **Export to Excel (XLS)** or **PDF**.



Note: Selections are persistent. The next time you Export, the same options will be selected.

- Check the **Statistics Display** details to include in each layout.



- Select **Export** then **Open** to preview and print or **Save** the document for future reference.



Export / Format Options

The screen is comprised of three sections: Export Format, Layout Options and Comment Display.

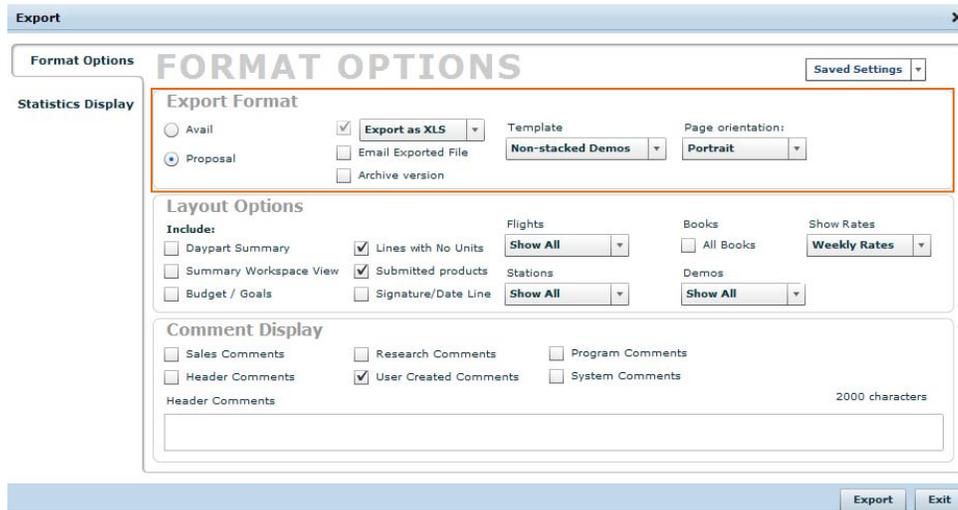


Figure 1

Export Format

Export the Avail or Proposal

- The export defaults to Avail or Proposal, depending on the screen you chose to export from.
- Certain options may vary depending on the type of export selected.

Export to XLS (Excel) or PDF

- Avails and Proposals automatically export to Excel.
 - Excel worksheets include formulas and values, making it easy to edit the information.
- PDF ensures the exported data cannot be edited.

Email Exported File (Figure 2)

- Automatically opens an email dialog box.
- Enter the required information and select **Send**.
- The XLS or PDF is attached and sent directly.

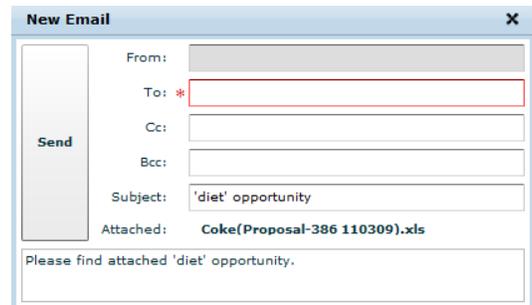


Figure 2

Archive Version (Figure 3)

- Enables a third tab on the Export screen.
- Type the Description and Expiration Date
 - Reminders appear if a required field isn't completed.
- **Create & Export** saves a snapshot and each Version will be saved on the Versions tab.

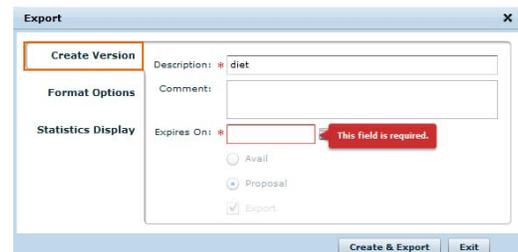


Figure 3

Stacked Demos Non-Stacked Demos (Figure 4)

- Stacked Demos list the demos down a column.
- Non-Stacked Demos display across a row.

Non-Stacked Demos						Stacked Demos			
A25-54			M25-54			A25-54		M25-54	
Rtg	Shr	H/P	Rtg	Shr	H/P	Primary	Primary	Primary	Primary
3.2	23	14	1.6	16	10	Rtg	3.2	1.6	
4.6	24	19	2.6	17	16	Shr	23	16	
						H/P	14	10	

Figure 4



Layout Options

Layout Options work in conjunction with Statistics Display and offers a few different ways to view data.

- **Layout Options** allows you to choose specific layouts to include in an export. (Figure 5)
- **Statistic Display** allows you to decide the details you want in each layout.

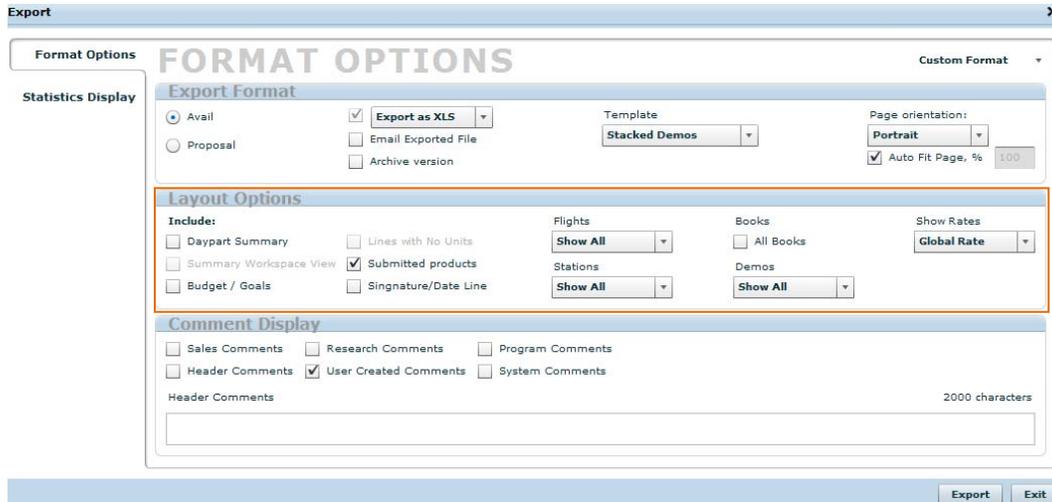


Figure 5

Daypart Summary

- Select to include the Daypart Summary in the Avail or Proposal export. (Figure 5)
- From Statistics Display, check the details you want included. (Figure 6)
- Daypart Summary will export to a separate Excel worksheet. (Figure 7)

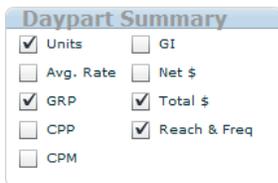


Figure 6

14 DAYPART SUMMARY		January				SUMMARY
15		12/29	01/05	01/12	01/19	M25_54
16	EM Early Morning	Units	3	3	3	12
17		Total \$	\$6,300	\$6,300	\$6,300	\$25,200
18		GRPs	\$5	\$5	\$5	\$19
19	St. Louis	Reach	2.3	2.3	2.3	4.8
20		Frequency	2.1	2.1	2.1	4.0
21						

Figure 7

Summary Workspace View

- If included, the Workspace View provides a snapshot of the Summary tab of an Avail or Proposal.
- The Workspace Summary will export to a separate Excel worksheet. (Figure 8)

Volkswagen 12/29/08-01/25/09

Agency:	Action Media Inc.	Buyer:	Administrator
Advertiser:	Volkswagen	Phone:	WTV-SC
Description:	Autobahn for All	Email:	
Estimate#:		Demos:	M25-54
Flight(s):	12/29/08-01/25/09	Hiatus:	
Books:	WTV-SC: Jan 2008 PA L7	Unit Lengths:	:30

Station	Dayparts	Buy Goals			Proposal Summary							% to Goal				
		Station Budget \$	GRP	GRP,%	CPP	Station \$	GRP	% GRP	CPP	# Spots	Avg Rtg	Avg Rate	Reach / Fre	Station \$	GRP	CPP
WTV-SC	EM - Early Morning	\$45,600	57	100%	\$800	\$25,200	19	33%	\$1,326	12	1.6	2100	4.8 / 4.0	55%	33%	166%
	EN - Early News	\$0				\$20,000	38	67%	\$526	8	4.8	2500	15.2 / 2.5			
	Total:	45600.00	57.00	\$	\$800.00	\$45,200.00	57		\$793	20	2.85	\$2,260.00	19.3 3.0	55%	33%	166%

Figure 8

Lines with No Units

- Deselect this option to quickly remove any lines without units.

Submitted Products

- Allows you to include lines already submitted to a WO Traffic order.



Layout Options (continued)

Layout Options

<p>Include:</p> <input type="checkbox"/> Daypart Summary <input type="checkbox"/> Lines with No Units <input type="checkbox"/> Summary Workspace View <input checked="" type="checkbox"/> Submitted products <input type="checkbox"/> Budget / Goals <input type="checkbox"/> Signature/Date Line	<p>Flights</p> <p>Show All [v]</p> <p>Stations</p> <p>Show All [v]</p>	<p>Books</p> <input type="checkbox"/> All Books	<p>Show Rates</p> <p>Global Rate [v]</p>
		<p>Demos</p> <p>Show All [v]</p>	

Figure 9

Signature /Date Line

- Creates a line under the Avail or Proposal for a signature and/or date.

Flights

- If multiple flights were created, choose to **Show All** Flights or the individual flights.
- Each flight will create a separate Excel worksheet and include its own summary page.

Books

- If multiple books were selected, you may choose to include **All Books** in the export.
- Each book will be displayed down the column.
- The Primary book will be listed first and be displayed in bold.

Demos

- If multiple demos were selected, you may choose to **Show All** or any of the individual demos.
- Each demographic will be listed in a separate column with the Primary demographic listed first.
- Works in conjunction with Export Options – Stacked or Non-Stacked Demos. (See example Page 2)

Show Rates

- Select to export **Weekly Rates** or **Global Rates**.

Comments Display

Comments

- Comments are created in various areas of the application and can be included in the export.
- Comments will be displayed below the associated line(s).

Header Comments

- Create a Header Comment to be attached to the Header of the export.
- The Header Comment will be included in the header of the Avail or Proposal.

Volkswagen 12/29/08-01/25/09; 01/26/09-02/22/09

Agency: Action Media Inc.	Buyer:	Account Executive: Administrator
Advertiser: Volkswagen	Phone:	Station(s): WTV-SC
Description: Autobahn for All	Email:	Sales office:
Estimate#:		Phone:
Flight(s): 12/29/08-01/25/09; 01/26/09-02/22/09	Hiatus:	Cost: \$45,200 Reach: 29.2
Books: WTV-SC: Jan 2008 PA L7	Unit Lengths: :30	Units: 20 Frequency: 2.9
Demos: A25-54, M25-54		GRPs: 84
Thank you for your business		CPP: \$538

Daypart	Program	Time	Dates	Length	2009 January				Total	Book(s)	A25-54 M25-54	
					12/29	01/05	01/12	01/19			Primary	
WTV-SC	EM NBC Today Show	7 AM-9 AM	12/29/08-TFN	:30	3	3	3	3	12	Jan 2008 PA L7	Rtg 3.2	1.6
	M-F				\$2,100	\$2,100	\$2,100	\$2,100	\$25,200		Shr 23	16
				CPP	\$656	\$656	\$656	\$656	\$683		H/P 14	10
										Jan 2009 T L7	Rtg 4.6	2.6
											Shr 24	17
											H/P 19.4	15.7

Main Comment:
Programming Comment:
System Comment: Estimate based on actual performance of KSDK "4 WK AVG" M-F* 7:00a-9:00a from Jan 2008 T L7.

P 12-29-08 to 01-25-09
 Daypart Summary P 12-29-08 to 0
 P 01-26-09 to 02-22-09
 Daypart Summary P 01-26-09 to 0
 P Summary daypart

Figure 10

Note: When multiple flights are created and exported, each flight will create a separate Excel worksheet and include a Daypart Summary by flight.



Statistics Display

The Export Document Explained

From this screen, choose the details you want to include in the Export Format and Layout Options.



Figure 11

The details selected in Figure 11 will be displayed in Figure 12.

1. Rate Details

- Provides a row for each selected detail.
- Although Reach & Frequency were not selected, it appears for the Line Summary detail.

2. Line Summary

3. Demos

- This shows the Stacked Demo template chosen on Export Formats.

4. Daypart Summary

- Example available on Page 5.

5. Summary

6. Monthly Summary

Daypart	Program	Time	Dates	Length	2008				Total	Book(s)	A25-54	Primary	
					December 12/28	01/04	01/11	01/18					
WTV-SC	NBC Nightly News	M-F 5:28-6 PM	12/29/08-TFN	:30	2.00	2.00	2.00	2.00	8.00	Jan 2008 PA L7	Rtg 5.8		
				Units	2.00	2.00	2.00	2.00	8.00		Shr 21		
				Total \$	\$2,500	\$2,500	\$2,500	\$2,500	\$20,000		H/P 28		
				CPP	\$431	\$431	\$431	\$431	\$435		:30 CPP \$435		
				CPM	\$33	\$33	\$33	\$33			H/P 32		
				Reach & Frequency					19.9/2.3	Jan 2009 T L7	:30 CPP \$408		
System Comment: Estimate based on actual performance of KSDK "NBC NITELY NWS" M-F* 5:30p-6:00p from Jan 2008 T L7.													
PROPOSAL SUMMARY					December				SUMMARY				
					12/28	01/04	01/11	01/18	A25_54				
					Units	5.00	5.00	5.00	5.00	20.00			
					Total \$	\$11,300	\$11,300	\$11,300	\$11,300	\$45,200			
					CPP	\$514	\$514	\$514	\$514	\$538			
					Reach	12.40	12.40	12.40	12.40	29.22			
					Frequency	1.77	1.77	1.77	1.77	2.87			
MONTHLY SUMMARY (PRIMARY DEMO ONLY)					December				SUMMARY				
					A25_54								
					Units	20.00				20.00			
					Total \$	\$45,200				\$45,200			
					Reach	29.22				29.22			
					Frequency	3.01				2.87			

Figure 12



Current Format

After you've configured your Format Options and Statistics Display, you can save your Custom Formats. The drop down menu has three options allowing you to save and manage your Avail and Proposal Export options. These include Save Current Format, Manage Avail Formats and Manage Proposal Formats.

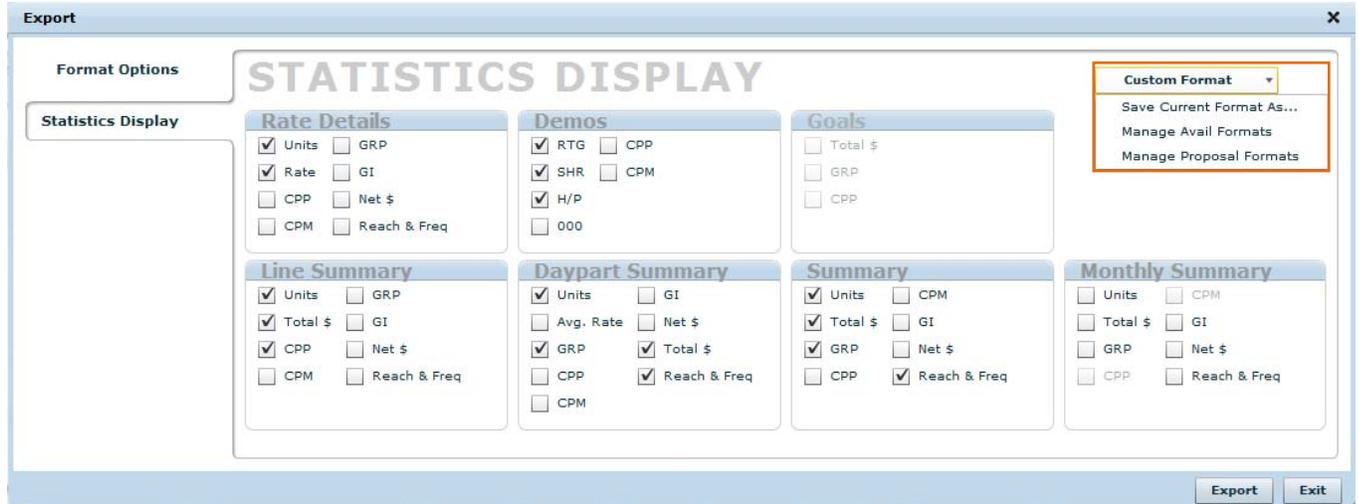


Figure 13

Save Format As...

- Select **Save Format As...** to save the current export Format Options and Statistic Display.
- Name the saved format for future reference. (Figure 14)
- The Saved view(s) will display at the top of the drop down menu. (Figure 15)

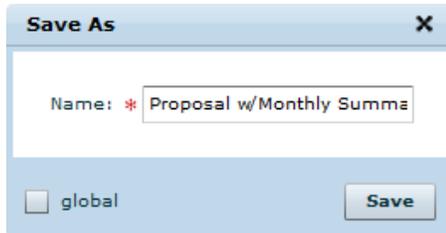


Figure 14

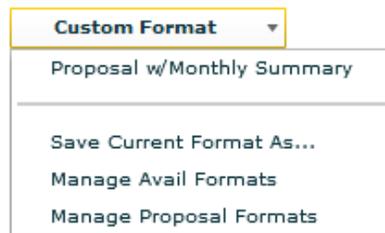


Figure 15

Manage Avail and Proposal Formats

- Select either option from the drop down menu to open the **Manage Save Formats** screen.
- All saved views will be listed on either tab.
- Designate a **Default** view, **Load** or **Delete** any saved views.
- Save your changes or close the window.

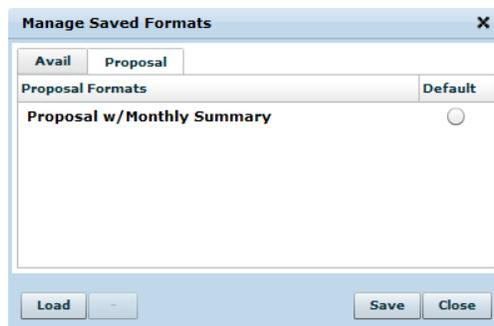


Figure 16