

*WO Sales v1.6*

# WideOrbit WO Sales Training Guide



## Managing Views

Understanding the Manage Views Menu Options

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## Manage Views

The Manage Views drop down menu offers several views for an Avail and Proposal, including any custom views that have been created. It also allows you to synchronize the Avail and Proposal, toggle between Global and Weekly rates and set data precision. Below you will find explanations of the Manage Views menu options.

Proposal/Weekly

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Manage Columns

Synchronize Avail-Proposal

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Global Rate

Weekly Rates

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Show All Rates

Show External Updates

Show Total Footer

---

Default Sort

---

Set precision

- **Custom views** - The top portion of the drop down menu, lists any Custom views previously saved in the database. Selecting one from the list will adjust the current view of the Avail or Proposal.
- **Manage Columns** – Accesses the Edit Column Views window, where views can be created, customized and saved.
- **Synchronize Avail-Proposal** – This checkbox will synchronize the Avail and Proposal with one another. If synchronize is selected from the Avail tab then the Proposal will be synched to the avail. Conversely, if this is selected from the Proposal tab then the Avail will be synched with the Proposal.
- **Global and Weekly Rates** –Typically, the Global Rate will be displayed on the Avail and Weekly Rates will display on the Proposal. From this drop down either rate view may be selected for the Avail or Proposal.

*Note: The Global rate is the highest rate found across all weeks of the schedule.*

- **Show All Rates** – With this option selected, both the Global and Weekly rates will be displayed on the Avail or Proposal.
- **Show Total Footer** – Displays a summary of the Avail or Proposal at the bottom of the workspace.

PROPOSAL SUMMARY	Stati...	1 ▲ CPP	GRP	CPM	GI	Units	Total \$	Avg \$
	All	\$1,326	19	\$210	120	12	\$25,200....	\$2,100.00
	WTV-SC	\$1,326	19	\$210	120	12	\$25,200....	\$2,100.00

- **Default Sort** – Select this option to reset all of the columns to the system default sort.
- **Set Precision** – Selecting this option will open the **Demo Precision** pop-up menu. From the menu you may choose to adjust the demo precision on the workspace. Adjusting a zero in a Demo field to a one will adjust the decimal accordingly.

**Demo Precision**

Rating \*

**RTG**

**1.6**

## Manage Views – Edit Column Views

Click **Manage Columns** to open the **Edit Column Views** window. The options provided here allow you to customize your view of the Avail and Proposal.

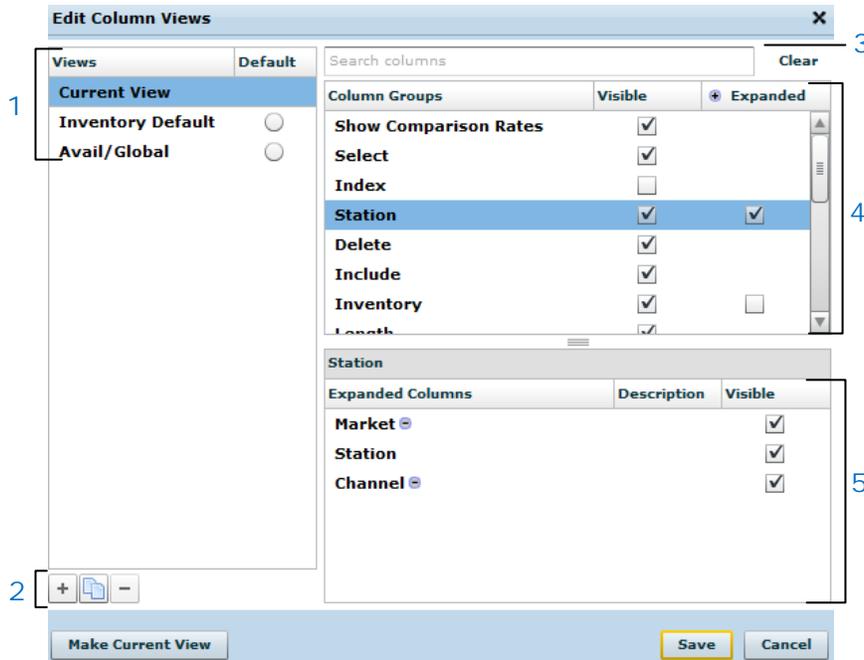


Figure 1

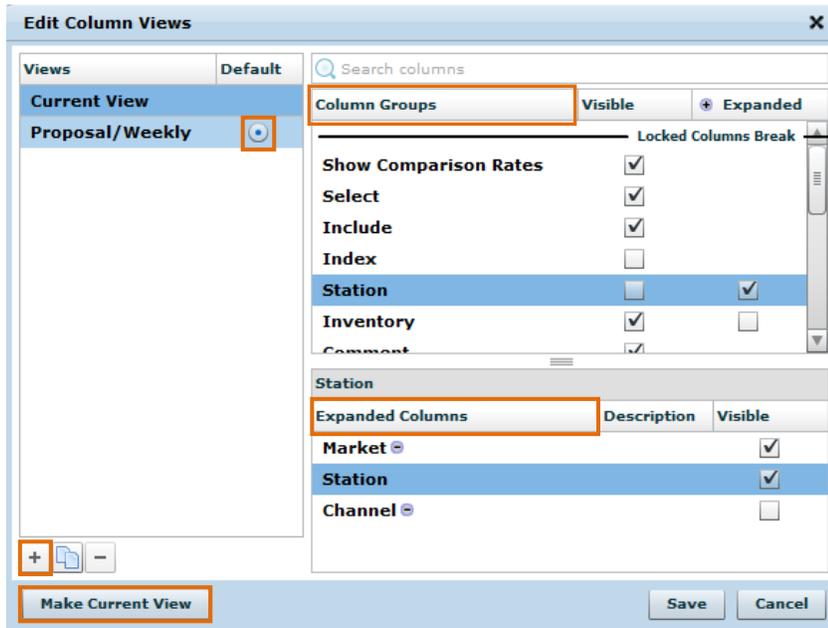
1. **Views** - This area displays the Current and saved custom views for the Avail and Proposal workspace. Selections made here, control the Column Groups displayed on the right.
  - To change the Current View for this workspace, select the **View**, click **Make Current View** on the bottom left-hand side and then **Save** your changes.
  - To change the Default, select the radio button next to view you wan and then **Save**.
2. **Configuration Options** - These options allow you to add, copy or remove custom views, which provides a fast way to view preferred screen configurations when working in an Avail or Proposal.
  - Saved screen configurations can be accessed at the top of **Manage Views** drop down menu.
3. **Search** - The search field allows you to quickly find the Column header you would like to review or edit.
4. **Column Groups** - Columns for the workspace are selected or deselected, via the boxes under **Visible**.
5. **Extended Columns** - Some column groups such as **Station** (Figure 1), have an additional checkbox under **Expanded**. When selected, it opens additional column views on the workspace.
  - To remove a column from the workspace, select the at the top. To remove a portion, hover your mouse over the area and click the .

Station			
	Market	Station	Channel
	St. Louis, St. Louis Prelim Period	WTV-SC	5

Figure 2

## Manage Views – Custom Views

The options available in this window allow you to create, customize and save views of the Avail and Proposal. Once saved, these views can be accessed from the top of the Manage Views menu. The Custom Views saved in the Add Inventory, Avail and Proposal tabs will be exclusive to the tab they were saved on.



Note: Drag the **Locked Column Break** line (Figure 1) to any position in the Column Groups list. Column Groups positioned before this option will be locked where as Column Groups positioned after this option will scroll.

### Creating a Custom View

- To create a custom view, select the **+** on the bottom left-hand side of the screen.
- Name the new view, then **Add**. The view will appear at the bottom of the list and display in bold.
- Check the **Column Groups** and **Expanded Columns** you want to include.
- Use the **Make Current View** button to see a glimpse of your changes in the background.
- To make this the Default view, select the radio button to the right of your new view.
- Save your changes when done.

### Editing and Saving a Current View

- To edit a current view, choose Manage Columns from the Manage Views menu to open the Edit Column Views window.
- All Column Groups and Expanded Columns selections will be available to check.
- Use the **Make Current View** button if needed and **Save** your changes.

### Managing Custom Views

- To edit the name of a view you've created, double click on the name to open the field for editing.
- To **Duplicate** a view that you do not have access to edit, click the **📄** button.
- Name the new view then add or remove **Column Groups** and **Expanded Columns**.
- **Save** your changes.
- To **Delete** a saved view that you've created, click the **-** button then **Save** your changes.
- To quickly change the view of your workspace, use the **Make Current View** button.

Note: Make Global , Make Local  and Edit  are security controlled. An administrator at your stations will have access to these functions.