

WO Sales Accounts

An account consists of a linked Station, Agency, Advertiser and Account Executive. A Direct Advertiser includes both Advertiser and Agency information and can be created or searched for from either screen. Although it is possible to create an Agency or Advertiser separately, and then link them together in the Account profile, the most efficient way to create an Agency or Advertiser is from inside of the Account profile.

WO Traffic Integration

Accounts created in *WO Traffic* will automatically be available when you log into *WO Sales*. Creating accounts in *WO Sales* allows an Account Executive to continue with Opportunities, Avails and Proposals, as the station works through the credit approval process. Once the accounts are created in *WO Traffic* and synced, you can submit the Avail and Proposal to an order.

Create an Advertiser or Agency from an Account

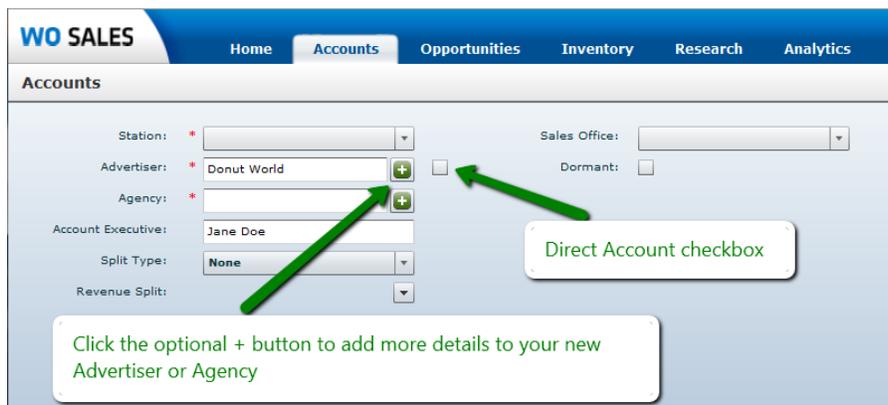
It's always best practice to search for an existing Account before creating new.

1. From the Accounts tab, select **Accounts** from the drop-down menu.
2. Select **New** from either the shortcut menu or the button on the top right of the screen.
3. Select the Station(s), Account Executives, Sales Offices, etc., in the Account profile.
4. If the Agency and/or Advertiser already exist in the system, start typing the name in the appropriate field, and then select the name from the auto-complete drop-down list.

5. If the Agency and/or Advertiser do not already exist, you can create new advertisers and agencies on the fly. Simply type in the new names in the appropriate fields – that is the only required information.

- o Optionally, you can add more info to the new Advertiser or Agency by clicking the **+** icon to the right of the name fields and entering the information in the pop-up.

6. If the Advertiser is direct, check the box to the right of the Advertiser field.
7. Click the **Save** button in the top right corner of the Account profile to save the new account.



Create a Direct Advertiser

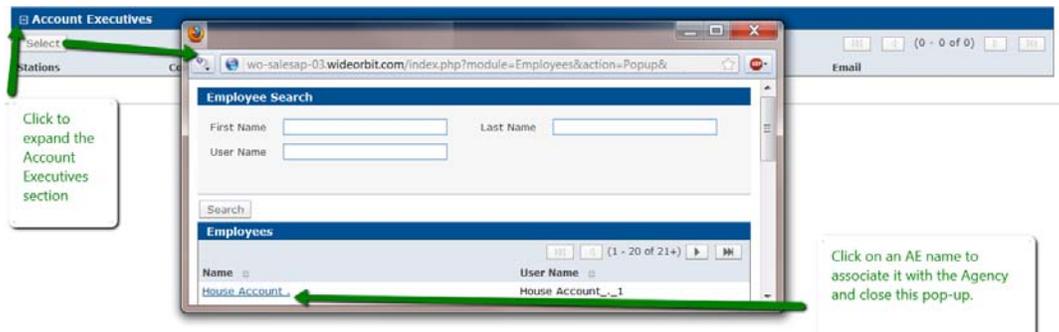
Direct Advertisers can also be created from the Agency or Advertiser screens.



1. Select the **Create Direct Advertiser** link from the shortcut menu.
2. Enter the mandatory fields: **Advertiser Name** and **Station** then complete the form and **Save**.
3. Direct Advertisers can be searched for from the Agency, Advertiser or Accounts screens.

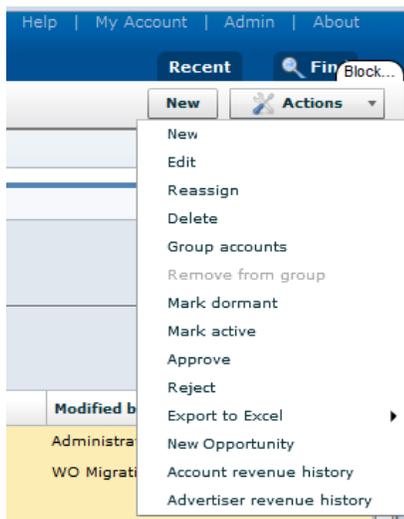
Linking Account Executives to an Agency

1. Select the **+** icon next to the Account Executives from the bottom of the Agency profile.
2. Click **Select** to open the Employee Search pop-up.
3. Filter for the correct AE, and then click on the AE's name to associate the AE to the Agency.



Duplicate Accounts

Delete or group duplicate accounts from the Accounts search screen.



1. To delete an account, check the box to the left of the account name, and then select **Delete** from the **Actions** menu.
2. To merge accounts, check the box to the left of the duplicate account names (belonging to the same station), then select **Group Accounts** from the Actions menu.
3. Select the radio button to the left of the primary account.
4. Click **Apply** to complete the transaction and group the duplicate accounts.