

WO Sales v2.1

WideOrbit
WO Sales Training Guide



Avails and Proposals

Exporting Avails and Proposals

CONFIDENTIAL INFORMATION

This document contains information confidential and proprietary to WideOrbit Inc. Contents of this publication may not be reproduced in any form, or by any other means, or stored in any database or retrieval system without the prior written permission of WideOrbit, Inc. Reproduction or reverse engineering of copyrighted software is prohibited. The information contained in this guide is subject to change without notice or obligation.

© Copyright WideOrbit Inc. All rights reserved.



Table of contents

Exporting Avails and Proposals	
How to Export Avails and Proposals	3-4
Export / Format Options	
Export Format	
Layouts (Custom)	5
Export Version	5
Archive Button	5
Template	5
Email Options	
Email buttons	6
Layout Settings	
Standard Format vs Custom Format	6
Flights	7
Demos	7
Books	7
Show Rates	7
Proposal Summaries	7
Lines with No Units	7
Include Ordered Lines	7
Signature / Date Line	7
Multiple Flight Tabs	7
Multiple Station Tabs	7
Primary Books Only	7
Include Book Names	7
Hide Flight Hiatus	7
Fit to Width	8
Summaries tab	
Daypart, Monthly, Line, Summary	8
Summary Sheet	8
Comments tab	
Comments	9
Header Comments	9
Export Document Details	9
Layouts	
User-created Custom Layout	10
File type (PDF, XLS, XML)	10



Exporting Avails and Proposals

Avails and Proposals are exported throughout the negotiation process. *WO Proposal* offers several options that allow you to decide how much detail to include in each export. This document will guide you through exporting Avails and Proposals, explain the available formatting options and show examples of the resulting export report.

How to Export Avails and Proposals

1. Select the **Export** tab to open the export options screen.



2. From the Export Format section select a **Layout**.

Export Format

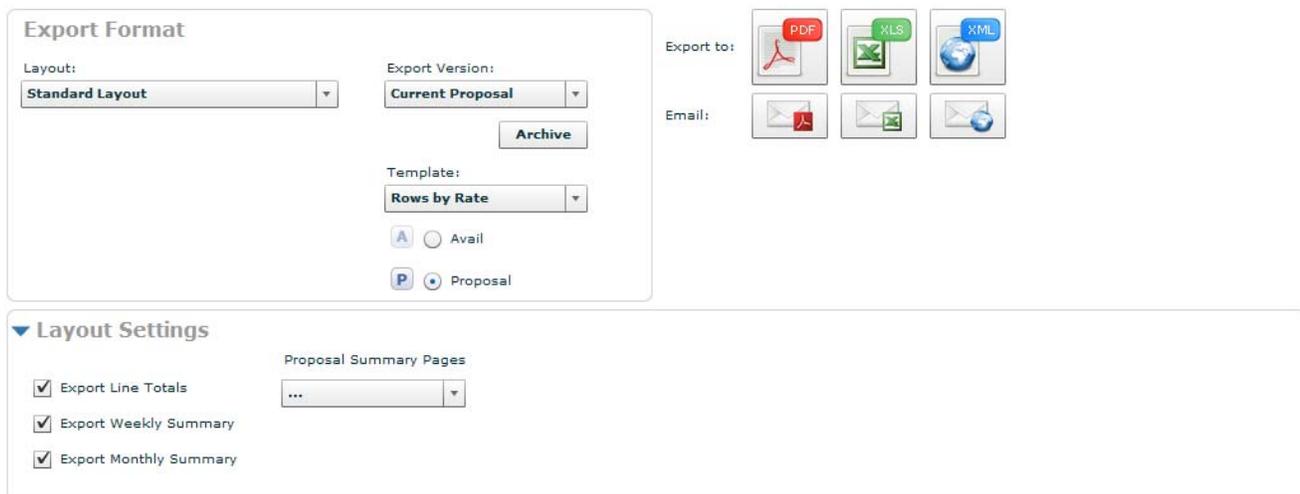
Layout:



- **Standard** – a cleaner overall view. Options are controlled by what is seen in the workspace; included fields are inherited from the Avail or Proposal tab. For example, any filter selections set on the Avail or Proposal tab will carry over to the export, and any columns hidden in the Workspace screen view will be hidden on the export.
- **Custom** – allows you to choose specific details to be included in the export by making selections offered as Layout Settings. Custom exports are not influenced by the Workspace screen view.

Standard options

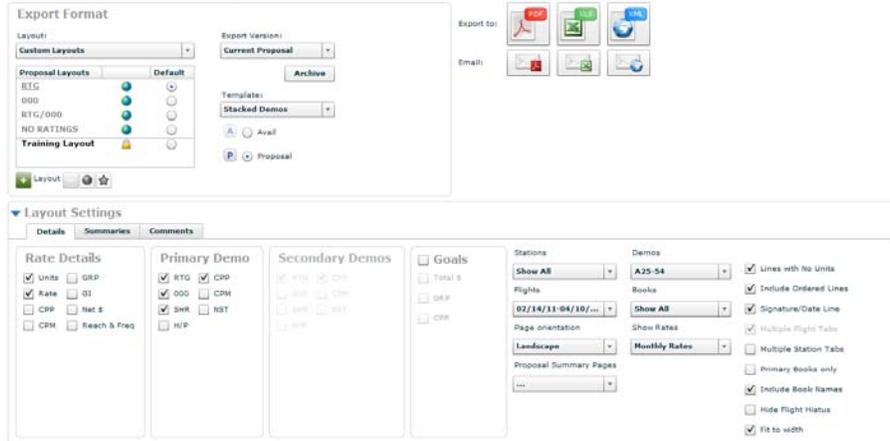
- Select a **Version** to export from the drop down menu if multiple versions have been archived.
- Click the **Archive** button to save a copy of the current schedule to the Archived tab.
- Select a **Template** option; **Stacked Demos, Non-Stacked Demos, Rows by Rate**.
- Select the **Avail** or **Proposal** radio button.
- **Layout Settings** allow you to include/exclude specific Summaries.





Custom options

- Choose one of the pre-loaded **Layouts**, add or subtract your own custom Layout. Clicking the radio button will set a Layout as the Default.
- Select a **Version** to export from the drop down menu if multiple versions have been archived.
- Click the **Archive** button to save a copy of the current schedule to the Archived tab.
- Select a **Template** option; **Stacked Demos, Non-Stacked Demos, Rows by Rate.**
- Select the **Avail** or **Proposal** radio button.
- Check to select or deselect specific details in **Layout Settings.**



3. Click the appropriate button to email or export as **Excel (XLS)**, **PDF** or as **XML**. If Exporting, open to preview and print, or Save the document for future reference. (see page 10 for further file type information)

Standard Export

Program	Daypart	Length	Rate	04/11	04/18	Total	A25-54 RTG	M25-54 SHR	W25-54 RTG	
WTV-SC										
Chuck	TV-PR	:30	\$12,000	1	1	2	3.4	8	4.0	2.9
M 7 PM-8 PM	TFN					\$24,000	\$3,529		\$3,000	\$4,138
The Event	TV-PR	:30	\$16,000	1	1	2	2.4	5	2.9	1.8
M 8-9 PM	09/20/10-05/24/11					\$32,000	\$6,667		\$5,517	\$8,889

The cleaner view of a Standard layout is seen in the above illustration. Notice a few items in particular;

1. The line total column displays a number of Units and Rate only for each program - as opposed to the Custom layout seen below, which can display multiple pieces of information such as the CPP and GRP for each week on each line.
2. Although multiple rating books are selected for the schedule, when the Rows by Rate Template is chosen, the Standard layout includes data for only the Primary book.
3. The Standard layout will include a separate General Summary sheet/tab when the Rows by Rate Template is used.

Custom Export

Daypart	Program	Flight	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Total	Book(s)	Primary A25-54	M25-54	W25-54	
WTV-SC																
TV-PR	Chuck		Units	1	1						2	Feb 2011 PA L	Rtg	3.4	4.0	2.9
M	7 PM-8 PM	TFN	:30	\$12,000	\$12,000						\$24,000	000	107			
			CPP	\$3,529	\$3,529						\$3,529	Shr	8			
			GRP	3.4	3.4						\$3,529	:30 CPP	\$3,529	\$3,000	\$4,138	
												Nov 2010 PA L	Rtg	3.5	4.0	3.1
												000	110			
												Shr	8			
												:30 CPP	\$3,429	\$3,000	\$3,871	



Export Format - Standard

4. Avail/Proposal radio buttons

The export defaults to Avail or Proposal, depending on the screen you were last in. Select either here by clicking the appropriate radio button. Your selection affects Layout Settings which will vary depending on the type of export selected, e.g. **Lines with No Units** is automatically selected when exported as an Avail.

Export Format - Custom

5. Layouts – Custom only

Use a pre-loaded Layout or one you created and saved - select by clicking to highlight.

A Globe icon = available to all users.
A Lock icon = seen by the creator only.

Radio button selection determines default layout.

Proposal Layouts	Default
RTG	<input checked="" type="radio"/>
000	<input type="radio"/>
RTG/000	<input type="radio"/>
NO RATINGS	<input type="radio"/>
Training Layout	<input type="radio"/>

1. Export Version

The export defaults to the Current Avail/ Proposal version. Use the pull down menu to select any previously archived version to export.

2. Archive Button

Click to take a snapshot of the current Avail or Proposal, which will be saved on the Archived tab. A Description and Expiration date are required, and there is a field for optional Comments if needed.

3. Template

Non-Stacked Demos - details display across a row.
Stacked Demos - details list down each Demo columnn.

Non-Stacked Demos	W25-54		M35-64		Primary	
	Primary				W25-54	M35-64
	Rtg	Shr	Rtg	Shr	Rtg	Shr
	2.4	17.0	2.3	16.9	2.4	2.3
				Shr	17.0	16.9

Stacked Demos

Note : When Stacked/Non-Stacked Demos Templates are used, multiple rating books can display on the export.

Rows by Rate (Proposal only) displays separate rows for each individual rate assigned to a length per program. Note: When multiple rating books are present, the export will include only Primary book data.

:30	\$12,000		2	1
	\$14,000		2	2



Email Options



Clicking an Email button allows you to email the exported file as the corresponding file type.

- This automatically opens an email dialog box.
- Enter required * and optional information then select **Send**.
- The export file is attached and sent directly.

Layout Settings (lower portion of your screen)

Layout settings is where data, summary information and comments are chosen for inclusion. There are several different ways to view data and determine the details to be included in each layout.

Standard contains very few options, the export is driven mainly by what is seen on the Workspace screen.

- Using the Stacked and Non-Stacked Demos Templates you can affect how Demos are displayed (see Template options above).
- On Proposals, when the Rows by Rate Template is selected you can include additional Summaries. (figure 1)

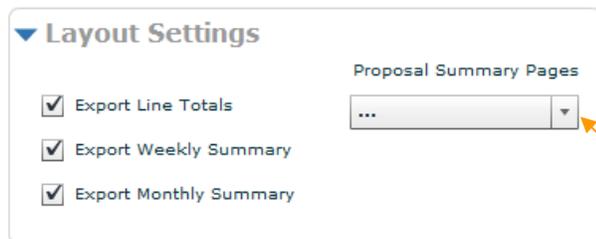
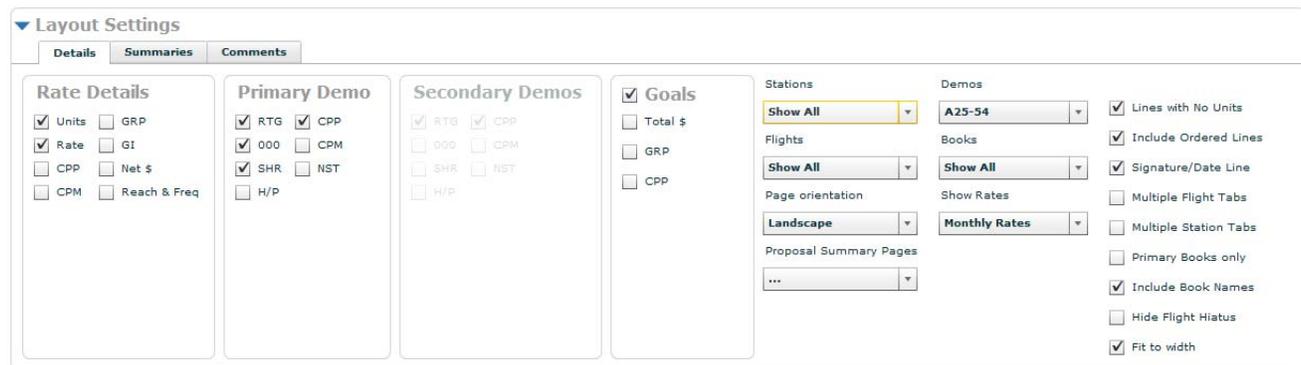


Figure 1

Standard Layout Settings

- Check boxes allow you to include Line, Weekly and Monthly Summaries on the export.
- Proposal Summary Pages, when selected, will each print on a separate tab or page.

Custom Layout Settings allows you to hand select details, summaries and comments that will appear on the export. Pre-loaded layouts contain default Layout Settings selections. *Note:* You can add or remove selections on Pre-loaded layouts before exporting your schedule. (see definitions/explanations for each option on next page)





Details tab (Custom only)

Select statistic details to be included for Rates and Demos, then select to include Goals information from the Budget step in the Header by check-marking the Goals box. Pull down menus and check-box options on the right side of the screen allow you to include/exclude information and affect formatting.

Flights

- On multi-flight schedules, choose to **Show All** Flights or select specific individual flights for export.

Demos

- If multiple demos were selected, you may choose to **Show All** or select individual demos.
- Each demographic will be listed with the Primary demographic designated as such and listed first.
- Works in conjunction with **Template** – Stacked or Non-Stacked Demos.

Books

- Choose to include the Primary Book, specific Books or All Books when multiple books are present on a schedule. *Note: This pull down is disabled when the Primary Books only checkbox is selected.*
- In the menu, to the right of each Book's name, numbers represent # of Programs utilizing each Book.
- Each selected book will be displayed by name on the export down the Books column with the Primary book listed first and displayed in **bold font**.
- Books designated as Primary will display in this pull down menu with a **P** icon.

Show Rates

- Select to export **Weekly, Monthly** or **Flight Rates**.

Proposal Summary Pages

- Opt to include summaries as viewed on the Summary tab of an Avail or Proposal. Each Summary will export as a separate Excel worksheet.

Lines with No Units

- Deselect this option to exclude any lines without units.

Include Ordered Lines

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

Signature /Date Line

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

Multiple Flight tabs

- Selecting Multiple Flight tabs will print schedules for all selected flights on separate sheets/tabs.

Multiple Station tabs

- Will export multiple station schedules showing each station on its own sheet/tab.
- Deselecting does not exclude Competitors' ratings data. If Competitors are included on the Avail/Proposal, they will be included on the Export.

Primary Books only

- Selecting this option will export only Primary book data.

Include Book Names

- Allows you to include Book names in a Books column on the export. Deselecting will suppress Book names. *Note: When Book names are suppressed, ratings will still appear on the export if selected in the Demos or Summaries details areas.*

Hide Flight Hiatus

- When export contains Weekly Rates, opt to show Hiatus Weeks or exclude them.



Fit to width

- When selected will export an entire schedule on one page. The print can be very small and thus hard to read in print form on PDF exports. Deselecting the option will break up the schedule and place portions on separate pages thus making the report easier to read. (see below)

		2011				
		January				
Daypart	Program	01/27	01/28	01/29	01/30	01/31
WFSB	The Martha Stewart Show					
	M-F 12-1 PM TFM					
	Units	3	3	3	3	3
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200
PROPOSAL SUMMARY						
	Units	3	3	3	3	3
	Total \$	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200
	Reach	0.7	0.7	0.7	0.7	0.7
	Frequency	2.1	2.1	2.1	2.1	2.1
MONTHLY SUMMARY (PRIMARY DEMO ONLY)						
	Units	12				
	Total \$	\$14,400				
	CPM	\$1,200				
	Reach	2.8				
	Frequency	3.7				

page 1

		March					April					May															
Daypart	Program	03/07	03/08	03/09	03/10	03/11	03/12	03/13	03/14	03/15	03/16	03/17	03/18	03/19	03/20	03/21	03/22	03/23	03/24	03/25	03/26	03/27	03/28	03/29	03/30	03/31	
WFSB	The Martha Stewart Show																										
	M-F 12-1 PM TFM																										
	Units	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	
PROPOSAL SUMMARY																											
	Units	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
	Total \$	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	
	Reach	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	
	Frequency	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	
MONTHLY SUMMARY (PRIMARY DEMO ONLY)																											
	Units	12																									
	Total \$	\$14,400																									
	CPM	\$1,200																									
	Reach	2.8																									
	Frequency	3.7																									

page 2

		June					July								
Daypart	Program	06/02	06/03	06/04	06/05	06/06	06/07	06/08	06/09	06/10	06/11	06/12	06/13	06/14	06/15
WFSB	The Martha Stewart Show														
	M-F 12-1 PM TFM														
	Units	3	3	3	3	3	3	3	3	3	3	3	3	3	
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	
PROPOSAL SUMMARY															
	Units	3	3	3	3	3	3	3	3	3	3	3	3	3	
	Total \$	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600	
	CPM	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	
	Reach	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	
	Frequency	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	
MONTHLY SUMMARY (PRIMARY DEMO ONLY)															
	Units	12													
	Total \$	\$14,400													
	CPM	\$1,200													
	Reach	2.8													
	Frequency	3.7													

page 3

Summaries tab (Custom only)

Summaries can be included or excluded from the export. Select details to include by checking the appropriate boxes in each area.

Layout Settings

Details | **Summaries** | Comments

Daypart Summary

Units GI

Avg. Rate Net \$

GRP Total \$

CPP Reach & Freq

CPM

Monthly Summary

Units CPM

Total \$ GI

GRP Net \$

CPP Reach & Freq

Line Summary

Units GRP

Total \$ GI

CPP Net \$

CPM Reach & Freq

Summary

Units CPM

Total \$ GI

GRP Net \$

CPP Reach & Freq

Summary Sheet

Daypart Summary (optional)

- Select to include a Daypart Summary for each flight.
- Daypart Summary will always export to a separate sheet/tab.



Monthly Summary (optional)

- A monthly summary will print below schedule details.
- NOTE: This option can only be selected when the Show Rates selection (Details tab) is Weekly Rates. And, on a multi-flight schedule when the Multiple Flight Tabs options is also selected.
- A system generated tool tip will appear if you hover above the Monthly Summary on the Summaries tab explaining the required detail selections.

Line Summary

- Details appear in the Total column for each Program.

Summary

- Inclusive summary displays at the bottom of the page with total amounts for the selected Flight(s).
- Will appear titled on Avail as Avail Summary, on Proposal as Proposal Summary.

Summary Sheet check-box

- Select to include a separate Summary sheet/tab; included details mirror selections made in the Summary box – this moves the Summary from the bottom of the page to its own page, and will move the Monthly Summary to the Summary page as well when it is also selected.

Note: On Multi-Station schedules, Summary information will calculate as combined station totals, unless a single station is selected in the Stations drop down menu OR the Multiple Station Tabs option is selected on the Details tab.



Comments tab (Custom only)

Layout Settings

Details Summaries **Comments**

Comments Display

Sales Comments
 Header Comments

System Generated
 Research Comments
 Program Comments
 User Created Comments
 System Comments

Header Comments 1970 characters

Thank you for your business.

- Comments may be created in the Research Management area of the application in regards to book mapping and can be included in the export by selecting the Sales, Research, Program or System comments boxes.
- Create a **Header Comment** to display in the Header of the export.
- **User Created Comments** are entered on an Avail/Proposal in the comment column and will be displayed below the associated Program line(s) on the export when included here.

Export Document details

Tea Shoppe 12/28/09-03/28/10; 03/29/10-06/27/10

Buyer Account Executive House Account
 Agency Big Ads Station(s) WTV-SC
 Advertiser Tea Shoppe Sales office TV-SC Dallas
 Phone Phone (415)555-4567
 Email wodemo@wideorbit.com
 Estimate# Description 2010

Flights 12/28/09-03/28/10; 03/29/10- Demos W25-54
 Hiatus 01/25/10-01/31/10; 05/24/10-
 Books WTV-SC: Dec 2009 PA L7 Unit Lengths :30 **Line Summary**

Header Comment → Thank you for your business.

Daypart	Program	Units	April	May	June	Total	Book(s)	Primary
TV-EM	TV-SC Today at 5am		4	4	4	12	Dec 2009 PA L7	W25-54
M-F	5-6 AM 12/28/09-06/27/10	:30	1200.00	1425.00	1200.00	15300.00		
		CPP				1416.67	KTVT/Dec 2009 PA L7	
							WFAA/Dec 2009 PA L7	

User Created Comment → Main Comment: Number 1 Early News in the Market.

PROPOSAL SUMMARY						DEMO SUMMARY	
						W25-54	
		Units	4	4	4	12	12
		Total \$	4800.00	5700.00	4800.00	15300.00	15300.00
		GRP	3.6	3.6	3.6	10.8	10.8

Competitive stations →

Signature/Date Line →

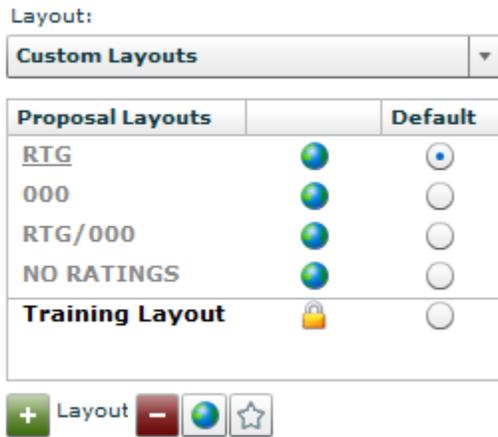
Signature _____ DATE _____

Proposal Summary Page from Details tab

Navigation: P 12-28-09 to 03-28-10 | P 03-29-10 to 06-27-10 | Multi-Demo Summary

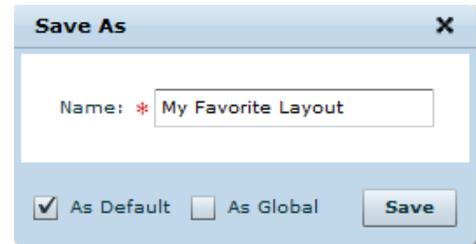
User-created Layout

If you have selected a pre-loaded layout in the Export Format > Custom Layouts section, which includes default Layout Settings, you can select additional options or deselect included options and save your new layout as a custom configuration.



- Customized layouts are displayed at the bottom of the list in **bold**.
- Select a layout for use by clicking to highlight.
- Remove user-created layouts by highlighting one and clicking the minus icon.

- Add your own custom layout by clicking the plus sign icon.
- Name the saved format for future reference.
- Designate the new layout as the Default and/or as Global.
- Save your changes by clicking the Save button, or close the window to exit without saving.



Export/Email as PDF, XLS (Excel) or XML



- PDF ensures the exported data cannot be edited.
- Excel worksheets include formulas, values and standard properties making information easy to edit. Note: Changes to the Excel report will NOT write back to *WO Proposal*.
- Export as XML to be received electronically into Agency software.