WO Sales v2.0

WideOrbit
***WO Sales* Training Guide**

Rate Cards

Creating, Editing, Managing and Viewing

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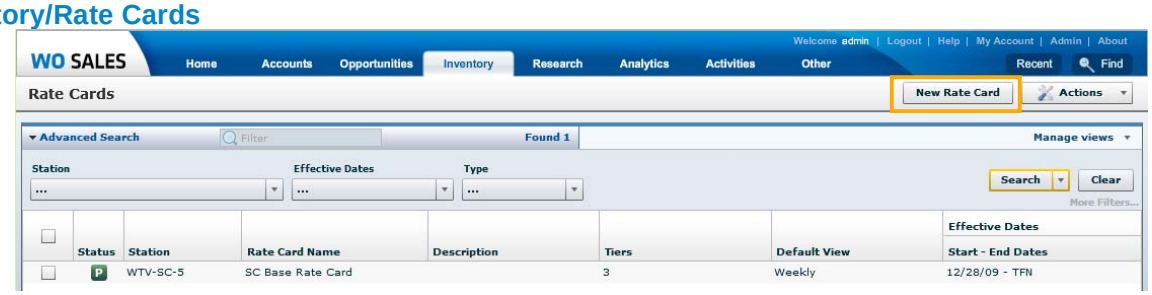
Creating, Editing and Managing Rate Cards for Sales Managers

This document will cover all areas of Rate Cards. The Create, Edit and Manage section of the document is intended for users with the proper security rights to perform those functions. The Viewing Rate Card section of the document is intended to be used additionally by Account Executives who typically will not have Edit and Create security rights.

Inventory/Rate Cards



- The main search screen lists all existing Rate Cards.
- To create a new Rate Card – click **New Rate Card** at the top right of the Search Screen.

- Rate Cards are divided into two main parts – **Card Properties** and **Pricing Worksheet**.
- **Card Properties** are entered by Management but can be viewed after creation.
- **Pricing Worksheet** displays Programs, Rates and Inventory level information.

Card Properties – comprised of three sections where entered information defines Rate Card attributes - access each section by clicking the .

Description

- Enter a required Name for the Rate Card and then select the appropriate Station.
- Enter an optional Description if you need to add further detail to describe what the card is based on.
- Enter the Effective Dates of the Rate Card – the End Date can be a specific date or TFN.
- Default View for the Rate Card can be set to Weekly, Monthly or Quarterly – rates will be entered in the body of the Rate Card in like fashion, but the view can be changed in the body of the Rate Card.
- Aggregation - when the Rate Card is viewed Monthly or Quarterly, rates displayed in the body of the Rate Card will be Most Frequent, Average or Highest rates for the selected time period.
- The Status of a Rate Card can be set to Published, Unpublished or Archived.
- Price / Length Rati - click the radio button to choose a Default Spot Length. You have the option to enter Rate Offset percentages, to the right, for other lengths based on the chosen Default length.

Tiers - Create and Name one tier which will be set as your "floor" or lowest rate tier. The floor tier is determined by selecting the radio button at the top of the screen. Create by entering a name and clicking **Add Rate Tier**.

- Additional tiers can be added and are based on a selected tier from any Rate Card in the system.

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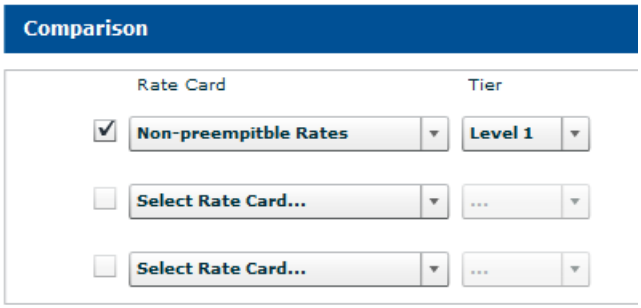
- Tiers can be structured with a percent (Rate Offset) or dollar amount (Rate Adjustment) increase or decrease over another tier.

Note: The Source date is the where you want the system to "look at" and base the rates off of; which dates (quarters/weeks/months) to look at. The target date is when you want the new tier to start.

- At the top of the window you can easily scroll through tiers, change Floor designation and remove tiers by clicking the . ***Tiers cannot be edited once they have been added.***

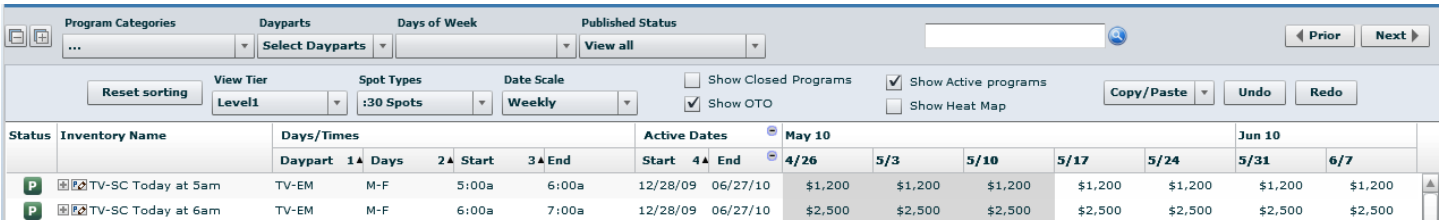
Comparison Data

- In the lower right of the screen, opt to include *WO Traffic* Booked AUR, Available Units, Sellout and Capacity (inventory level information) on the Rate Card. The option to Exclude Zero Value Rates will impact AUR only. Place checkmarks in the boxes next to each option to activate the Comparison Data (information will be seen in the Pricing Worksheet as hover tool tips).



You have the option to compare the Rate Card you are creating to up to three tiers from other Rate Cards in the system.
Select a Rate Card and a Tier from the pull down menus. *In order for the selected Rate Cards to display on the screen in the body of the Rate Card, you must check the box next to the chosen Rate Card. Selecting alone from the menus will not show them in the body of the Rate Card.* (information will be seen in the Pricing Worksheet under each individual Program)

Pricing Worksheet - Enter rates against each Program.



- All Programs can be seen in the body of the Worksheet. Utilize the Search Field and Filters (Program Categories, Dayparts, Days of Week, and Published Status) to limit the Programs displayed.
- Checkboxes (OTO, Closed Programs, Active Programs) at the top of the screen can also be used to include or exclude inventory from the screen. Tiers and Spot Lengths can be chosen via filters to display varying rate offsets.
- The Dates displayed will default to the current Broadcast Month, and the view can be set to Weekly, Monthly or Quarterly using the Date Scale filter. The **Next** and **Prior** buttons at the top of the screen will move displayed dates forward and backward in time. In the body of the pricing grid grey shading indicates dates in the past and Hiatus dates.
- The Heatmap can be activated by checking the Show Heat Map box. The heat map color codes cells based on inventory sell out, various colors indicating different levels. White cells indicate anything under a fifty percent sellout, anything above fifty precent is orange and anything above 100 percent is red. Hovering over a cell displays a tool tip giving inventory level information.
- Entering rates can be done by double clicking in a cell and entering a rate.

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Note: Rates will round to nearest $5 increment. Rates can be manually edited in an Avail or Proposal if rounded rates are not desired.

- Utilize the Copy/Paste menu at the top of the screen to copy and paste single or multiple cells. Rows and Columns can also be copied and pasted.
- Use the **Undo** and **Redo** buttons at the top of the screen up to several transactions.
- Comparison Data (Tiers, Rate Cards, AUR, Inventory demand) can be displayed on the screen below each Program if it was selected in Card Properties by clicking the ⊞ next to any Program. Once the Program has been expanded, click the ⊟ to collapse the Program.

Note: The ⊟⊞ icons at the top left of the screen can be used to collapse or expand all Programs at once.

Editing Rate Cards -

- Editing the Rate Card is similar to creating a Rate Card. Rates can be adjusted by clicking in cells and typing over existing rates. Cells can be copied and pasted, and Card Properties can be changed with the exception of Tier properties. When information is entered or edited in a Rate Card, the **Save** button at the top of the screen becomes orange.

Aug 09			
7/27	8/3	8/10	8/17
$1,200	$1,200	$925	
$2,300	$2,300	$1,925	
$2,250	2250	$1,775	

- Click PQ to view Program details. If your security rights permit, Programs may be edited via the Pricing Grid by clicking the P next to any Program. This may be useful when mapping Programs to other Inventory Codes.

Managing Rate Cards –

- The main search screen displays all Rate Cards.
- Filter options can be collapsed or expanded via **Advanced Search**.
- The search text field provides smart search against any words containing input letters.
- When you select a Rate Card, you can click on the ⓘ at the top of the screen to view information about the Rate Card without opening it. Two particularly useful items are Tier names and Spot Length Rate Offset percentages.
- Rate Card Status, represented by icons, indicates if the Rate Card is P Published (active for use), U Unpublished (not available for use) or A Archived (cards that may need to be referenced or reused in the future. e.g Political or Olympic rates). Status is established in the Rate Card on the Card Properties tab in the Description area.

Note: An End Date must be set before a Rate Card can be Archived.

- The Actions menu contains options to Edit, Delete, Export or change the Status of a Rate Card.
- To open an existing Rate Card double click or use the checkbox on the left and select Edit from the Actions menu.
- Rate Cards move forward as rates are entered for the future, and a rate card can contain several tiers, thus eliminating the need for multiple rate cards. A manager can designate a varying rate for each tier, and can offset rates for various spot lengths.

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Note: When a tier and/or a length are chosen from the filter pull down menus in the body of a Rate Card, the view will automatically update to reflect the correct offset values.

Exporting

- From the main search screen select **Export** from the Actions menu to export to an Excel worksheet or as a PDF file.
- From inside a Rate Card, select **Export Pricing List** from the Actions menu to open a window allowing you to select specific export options such as particular dates or Spot Lengths.
- The resulting Excel spreadsheet is editable (rows and columns can be removed; information in cells can be edited, and so forth).
- Edits made in the spreadsheet do not write back to WO Sales.
- If multiple Tiers exist on the Rate Card, each will export to a separate Excel sheet within the main document.

J14 | 1925

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2	**Name**	Standard Rates										
3	**Station**	WTV-SC-5										
4	**Description**											
5	**Effective Dates:**											
6	**Start Date**	2008-12-29	**End Date**	TFN								
7	**Rate Card Status**	PUBLISHED										
8	**Default spot**	30s Second Broadcast	**Rate offset**	100								
9	**Spot type**	30s Second Broadcast	**Rate offset**	100								
10												
11	**Status**	**Inventory name**	**Air Time & Days**				**Active Dates**		**Dec 08**	**Jan 09**		
12			**Daypart**	**Start**	**End**	**Days**	**Start**	**End**	**12/29**	**01/05**	**01/12**	**01/19**
13	PUBLISHED	TV-SC Today in St. Louis at 5a	EM	5:00 A	6:00 A	MOTUWETHFR	2008-12-29	TFN	925	925	925	925
14	PUBLISHED	TV-SC Today in St. Louis at 6a	EM	6:00 A	7:00 A	MOTUWETHFR	2008-12-29	TFN	1925	1925	1925	1925
15	PUBLISHED	NBC Today Show	EM	7:00 A	9:00 A	MOTUWETHFR	2008-12-29	TFN	1775	1775	1775	1775
16	PUBLISHED	NBC Today Show II	EM	9:00 A	10:00 A	MOTUWETHFR	2008-12-29	TFN	850	850	850	850
17	PUBLISHED	TV-SC Newschannel 5 at 10am	DY	10:00 A	10:30 A	MOTUWETHFR	2008-12-29	TFN	650	650	650	650
18	PUBLISHED	Best of Show Me	DY	10:30 A	11:00 A	MOTUWETHFR	2008-12-29	TFN	425	425	425	425
19	PUBLISHED	NBC Today Show III	DY	11:00 A	0:00 P	MOTUWETHFR	2008-12-29	TFN	475	475	475	475
20	PUBLISHED	TV-SC Local News at noon	DY	0:00 P	1:00 P	MOTUWETHFR	2008-12-29	TFN	850	850	850	850
21	PUBLISHED	Ellen	DY	1:00 P	2:00 P	MOTUWETHFR	2008-12-29	TFN	650	650	650	650
22	PUBLISHED	Days of Our Lives	DY	2:00 P	3:00 P	MOTUWETHFR	2008-12-29	TFN	1700	1700	1700	1700

Close Rates - 1 | Preemptible - 2 | Submit - 3

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Viewing Rate Cards for Account Executives

A rate card can contain several tiers, thus eliminating the need for multiple rate cards. A manager can designate a varying rate for each tier, and can offset rates for various spot lengths. Rate Cards move forward as rates are entered for the future.

Inventory/Rate Cards - The search screen displays all Rate Cards.

- Use the Search field or filters to narrow the list to a specific Station, Effective Dates and/or Status.
- Rate Card Status, represented by icons, indicate if the Rate Card is Published (active for use), Unpublished (not available for use) or Archived (cards that may need to be referenced or reused in the future. e.g Political or Olympic rates).
- Informational columns on the search screen include Rate Card Name, Description, # of Tiers, and Last Updated date.
- When you select a Rate Card, you can click on the above the list to view information about the Rate Card without opening it. Two particularly useful items are Tier names and Spot Length Rate Offset percentages.
- To open a Rate Card, double click on it or check the box to the left and select **View** from the Actions menu.

Card Properties tab - Card Properties are entered by Management, but can be viewed by Account Executives and reflect the selections made to build the rate card.

Pricing Worksheet tab - All Program Inventory can be seen in the pricing grid.

- Filters (Dayparts, Days of Week, etc.) can be utilized to limit the number of Programs displayed.
- Check boxes (Show OTO, Closed Programs, Active Programs) at the top of the screen can be used to include or exclude inventory from the screen.
- Tiers and Spot Lengths can be chosen via filters to display varying rate offsets.
- The dates will default to the current Broadcast Month, but can be set to Weekly, Monthly or Quarterly using the Date Scale filter.
- The **Next** and **Prior** buttons at the top right of the screen will move displayed dates forward and backward in time.
- In the pricing grid, grey shading indicates dates in the past and Hiatus dates.
- Show Heat Map check box: The heat map color-codes cells based on sell out - various colors indicating different levels. White indicates a 50% sellout or under, over 50% is orange and over 100% is red.
- Hovering over a cell displays a tool tip with inventory level information.
- Comparison Data (Tiers, Rate Cards, AUR, Inventory demand) can be displayed below each Program by clicking the next to any Program. Once the Program has been expanded, click the to collapse the Program.
- The icons at the top of the screen can be used to collapse or expand all Programs at once.
- Program details may be viewed by clicking the next to any Program.

Exporting - Rate Cards can be exported to an Excel spreadsheet or as a PDF file.

- Inside a Rate Card, select **Export Pricing List** from the Actions menu. Then designate specific export settings such as particular dates or Spot Lengths.
- The Excel spreadsheet is editable (rows/columns can be removed; info in cells can be edited, etc).
- If multiple tiers exist on the Rate Card, each will export to a separate Excel sheet within the main document.

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