Copying Avails and Proposals

Once an Avail or Proposal is created, you can copy it to create a new schedule. This is particularly useful when presenting the same package to multiple clients or placing the same schedule on a second channel. Below are the steps for copying an Avail or Proposal.

| Avails and Proposals Rew Edit | | | | | | | |
|-------------------------------|---------------|-------------------|-------------|---------------------|------------------------|----------------------|---------------------|
| ▼ Advanced Search | Q Filter | | | Found 27 | 1 Item Selected | i Flower Shop/Big A | New Edit |
| Stations | Sales Stage | Account Executive | Age | Agency | Advertiser | Flight | Duplicate Export |
| | Description S | tations | Advertiser | Flight Dates | Account Executi Amount | Weighted Pe Probabil | Export to XML |
| ✓ N 50 | Q1 W | VTV-SC | Flower Shop | 02/01/10 - 02/28/10 | House Account \$30, | ,000 \$4,500 | 15% |

Opportunities: Avails and Proposals

- Locate the Avail or Proposal you want to copy on the Search screen.
- It is possible to copy any version of an Avail or Proposal, including those previously submitted as orders.
- Check the box to the left of the item then select **Duplicate** from the **Actions** menu.

Note: The original Avail or Proposal may not be editable, but the new copy is fully editable.

- Copy one Avail or Proposal at a time; if more than one is selected, the Duplicate option will be greyed out in the Actions menu.
- After selecting Duplicate, a system generated message appears asking "Do you want to include previously submitted order lines?" – Click Yes or No.
- A new Avail/Proposal Id number is created.
- Open the new Avail or Proposal to edit any necessary information.

| Account * | ACCOUNT | | |
|-----------|--|--|-----|
| Flight* | Account Execution | Accounts | |
| Dayparts* | Account executive | Accounts | |
| | Account Executive: WO_AE Wideorbit AE | Account: Copeland Toyota / Copeland Toyota | 121 |
| Rates | Stations + WTV-SC-5 (1) + | | |
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Header Information

Account

Make any necessary changes to the Account, including the Description.

• To change the Advertiser, delete the current advertiser, then enter the new Advertiser in the Account field. The correct Agency will also populate as well as other information associated with the advertiser, such as Buyer information and Demo.

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Flight

If it is necessary to change flight dates, you may shift the flight and maintain all rates and unit information.

- Deleting the original flight will delete all Inventory. You would then add inventory as if you are starting a new Proposal.
- To shift flight dates, double click the flight on the right side of the screen, Clear the displayed dates, select new dates, then click Update Flight. The system then presents multiple options in a Shift Flight dialogue box.

Shift

Shifts the original week's rates and units to the new schedule.

• Additional weeks will display 0 units and ratecard rates.

Clear

Clears all scheduled units to 0.

• Rates are cleared and will reflect rate card rates for the new dates.

Keep

Keeps the rates and units in the weeks they were originally scheduled in, based solely on date.

- Rates and Units scheduled within their original dates, will remain as initially scheduled.
- Units scheduled outside the original dates will display 0 and Rates will reflect the new date's
 rate card rates.

Dayparts

Dayparts can be adjusted if necessary. Note: Remember to check the Add All Eligible Inventory and filter weekdays if necessary.

Rates

The Rate Card selected in the original schedule will be applied to the new copy, but can be changed in the workspace.

Ratings

The Rating Book(s) associated with the original schedule will be applied to the new copy. Adding or removing a book can also be done here.

Budget

Expected Closing Date and **Expiration Date** may need to be changed if the flight dates differ.

• Other goals, such as **Station Budget** or **GRP** may be adjusted in the new copy.

Workspace

| н | eader | Add Inve | entory Avail | Proposal | Summary | Archived | Export | | | | | | | |
|--|--|----------|-------------------|----------|-------------|--------------|----------------|--|--------|---------------|--------|------|---------------|--|
| Advanced Search Found 19 01/04/10-01/24/10 | | | | | | | 1/24/10 🔻 | Add to All Flig | hts | Manage views | • | | | |
| Stat | Station/Channel Dayparts Weekdays Name | | | | | | | Programs 🗗 Duplicate 🚺 New 🧧 Remove 🏢 Adjust W | | | | | ekday | |
| WT | WTV-SC 5 (1) All Dayparts V | | | | | More Filters | | Inventory | | | | | | |
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| | WTV-SC | TV-EM | TV-SC Today at 5a | m M-F | 5:00a - 6:0 | 00a 12/28/ | 09 - 06/27 💽 🔺 | | TV-EM | TV-SC Today a | at 5am | M-F | 5:00a - 6:00a | |
| P | WTV-SC | TV-EM | TV-SC Today at 6a | m M-F | 6:00a - 7:0 | 00a 12/28/ | 09 - 06/27 🕂 | | TV-EM | TV-SC Today a | at 6am | M-F | 6:00a - 7:00a | |

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| Shift Fl | ight | | × | | | | | |
|--|------------|------------|----------------------|--|--|--|--|--|
| Do you want to shift/clear Rates and Units for this flight? | | | | | | | | |
| | Shift | Clear | Keep | | | | | |
| Rates: | \bigcirc | \bigcirc | $\overline{\bullet}$ | | | | | |
| Units: | \bigcirc | \bigcirc | $\overline{\bullet}$ | | | | | |
| | | | | | | | | |
| | Ok | Canc | Cancel | | | | | |

WIDE

RBIT



Inventory tab

If you need to add additional inventory that you didn't add in the Header, use the Inventory tab to do so.

- If there are multiple flights, select a specific flight from the Flights drop-down menu.
- If adding the same inventory to all scheduled flights, click the Add to all Flights checkbox before adding the inventory.
- The **Add to all Flights** checkbox will *not* copy inventory that was added to a previous flight to new flights.
- The Add to all Flights checkbox will add newly added inventory to previous flights if checked.

Avail or Proposal tab

- The new copy acts as a brand new Avail or Proposal and all standard functionality and editing capabilities apply.
- If you have multiple flights, select specific flights from the Flight view menu to view that flights' inventory, rates and weeks.

Note: Comments entered by User on an original version will not carry over to the new copy