WO Sales v2.1

WideOrbit
***WO Sales* Training Guide**

Avails and Proposals

Creating Avails

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Creating Avails

Avails and Proposals provide the main workspace for analyzing and creating your pre-buy materials. Located on the Opportunities tab, the main search screen allows you to filter for any current opportunity within any sales stage. This document will guide you through creating a new Avail.

Avails and Proposals

- Click the **New** button located on the top right-hand side of the search screen.

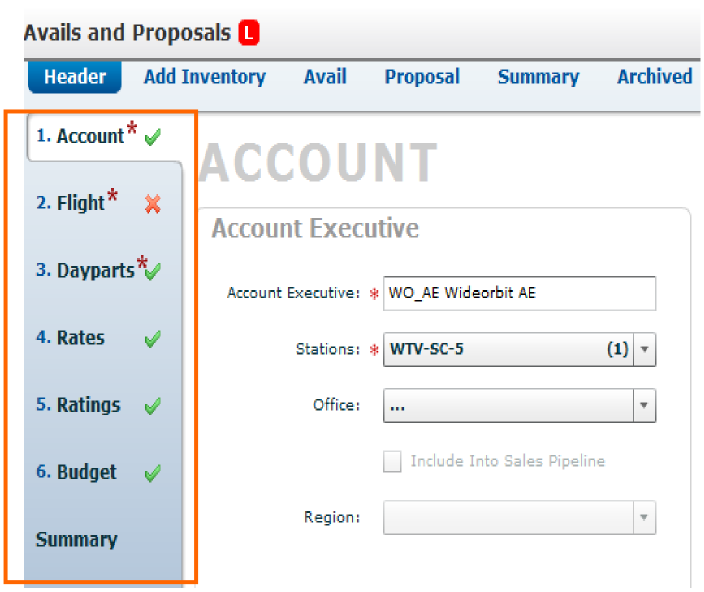
Avails and Proposals are comprised of several areas seen as tabs across the top of the form: Header, Add Inventory, Avail, Proposal, Summary, Archived, Export, Activities, Trender.

Header

The header is comprised of six steps listed down the left, and includes a Summary page.

- Select each step to display different screens of data.

*Note: *indicates mandatory fields, ✔ denotes the screen is complete, and ✖ means information is needed and must be addressed before you can save your work.*



Account

Some information will auto-populate based on an AE's user information and Account Assignments including station and office based on the AE and buyer and demo based on the advertiser selected.

Account Executive

- **Include into Sales Pipeline** (located under office) allows your station to track pending business. *Note: This option will become available and default to checked once the Advertiser and Agency are entered.*

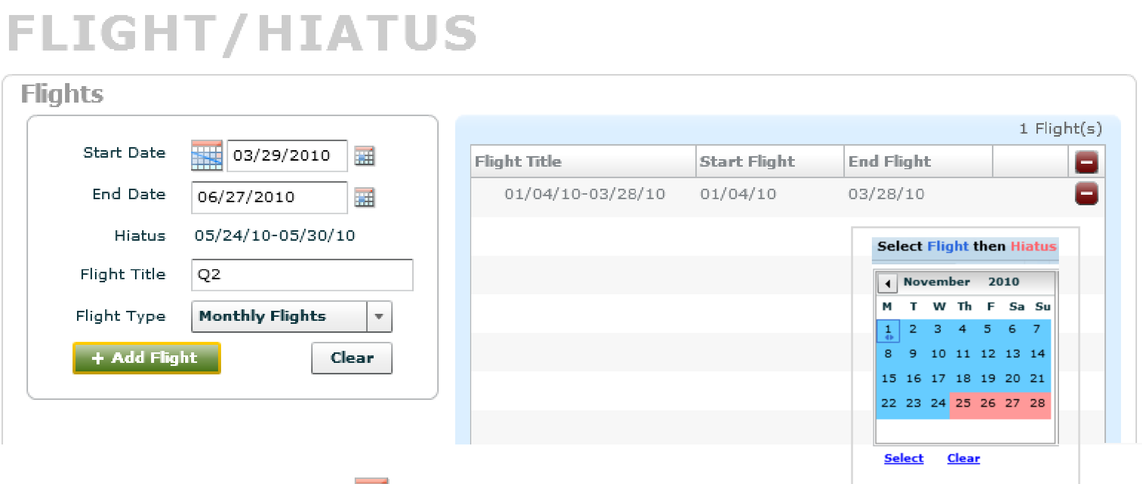
Accounts

- In the **Advertiser** field type a few letters of the Advertiser name and the drop down list will auto-populate. Select the correct Advertiser from the list. The accounts listed above the line are accounts that belong to the Account Executive; anything listed below the line (other) belong to other Account Executives.
- If the Advertiser does not exist, use the on the right to create it.
- Click the ellipsis button to view Advertiser details.
- The Account tab will display a until this Account is created and properly linked to the AE.
- Enter a **Description** which will populate the Product Description field when submitted to an order.
- If incorrect or incomplete information exists, hover over the indicated field for more information.

Buyer

- Will auto populate based on the Advertiser association, but you can create a new Buyer with the use of the on the right.

Flight



- Use the large calendar icon to create Flights and easily attach Hiatus dates.
  - Grab the **Flight Dates** with a left click and drag, then grab the **Hiatus Dates** the same way.
  - **Select** or **Clear** your dates with the buttons on the bottom left.
  - Closing out of the window will not save your dates; you must click **Add Flight**.
  - The small calendars will allow you to select specific dates.

Note: Flight dates display in Blue and Hiatus dates display in Red on the calendar.

- **Flight Title** allows you to title a flight. If left blank it will display dates for Single Flights, and Month name or Quarter name if Monthly or Quarterly flights are selected.
- **Flight Type** determines if selected dates should be a single flight, or it can be used to split the Avail into separate flights or merge multiple into one flight.
- **Add Flight** confirms dates and displays flights in the right-side panel of the screen.
- To edit any flight, highlight the flight on the right, make changes on the left, then click the **Update Flight** button.

Flight (continued)

Note: Adding separate flights will create separate ORDERS. If you would like your annual buy to be assigned to one order number, use only one flight.

Dayparts/Spot Lengths

- Dayparts mirror *WO Traffic* dayparts and are displayed on the top left. *(Figure 1)*
- Click the + to add each daypart.
  - As you make your selections, they will appear on the right.

Note: Dayparts can only be added from the Header of an Avail or Proposal.

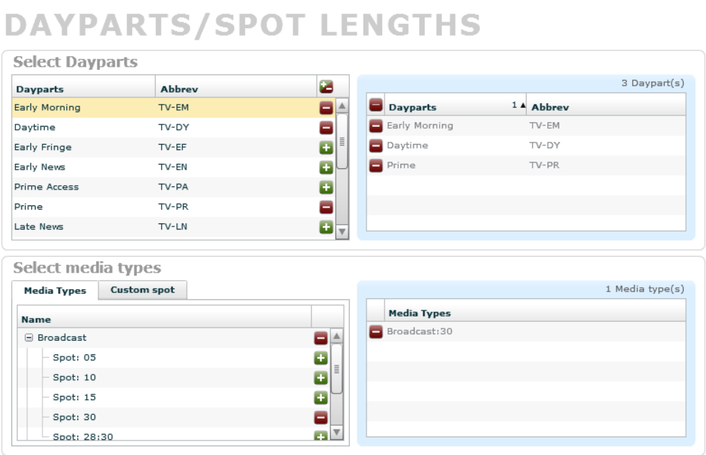


Figure 1

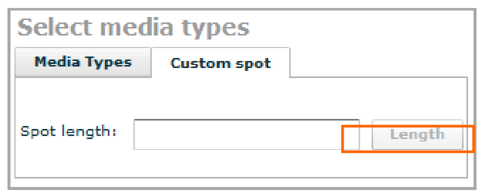
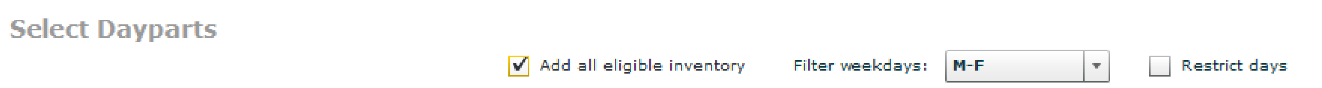


Figure 2

- Select Spot Lengths for the schedule by clicking the plus sign icon, or continue with the Station default length.
- Create a Custom Spot Length if needed on the second tab. *(Figure 2)*

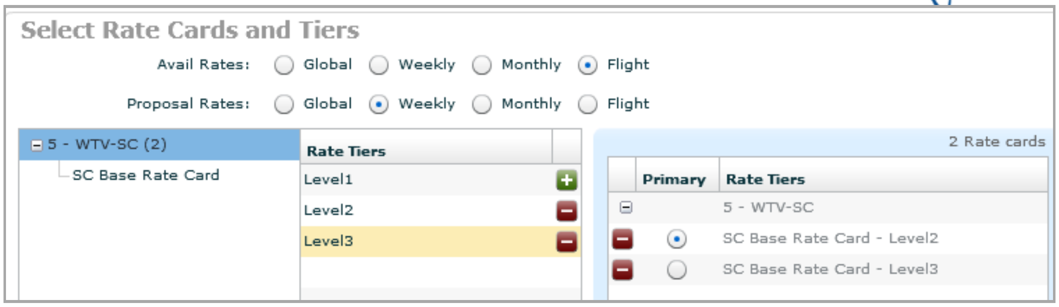
Note: Adding multiple Spot Lengths on the header of the Avail, ensures that each line will include that spot length. If this is not intended, you can add additional spot lengths for individual lines in the Avail workspace.



- Check the **Add all eligible inventory** box to have inventory automatically populate in the avail. You can also filter by days of the week or restrict days.

Rates

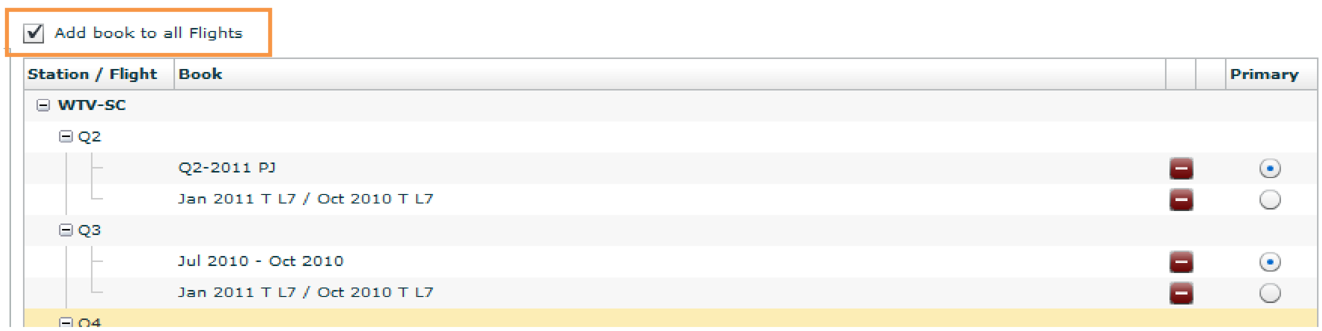
- How rates are displayed on the Avail and Proposal tabs is set here. Avail Rates will default to **Flight** and Proposal Rates will default to **Weekly**.
  - Change the default for this Avail by clicking the appropriate radio button.
  - Global rates will display the highest rate for the entire flight; Weekly will display individual week rates; Monthly will display a single average rate for each month in a flight; Flight will display a single average rate for the scheduled flight.
- Rate Cards are listed on the left with their corresponding Rate Card Tiers listed in the middle.
- Click the + to select a rate card tier and it will populate on the right side of the screen.
- You can add multiple rate cards and designate or change the **Primary**.



Ratings

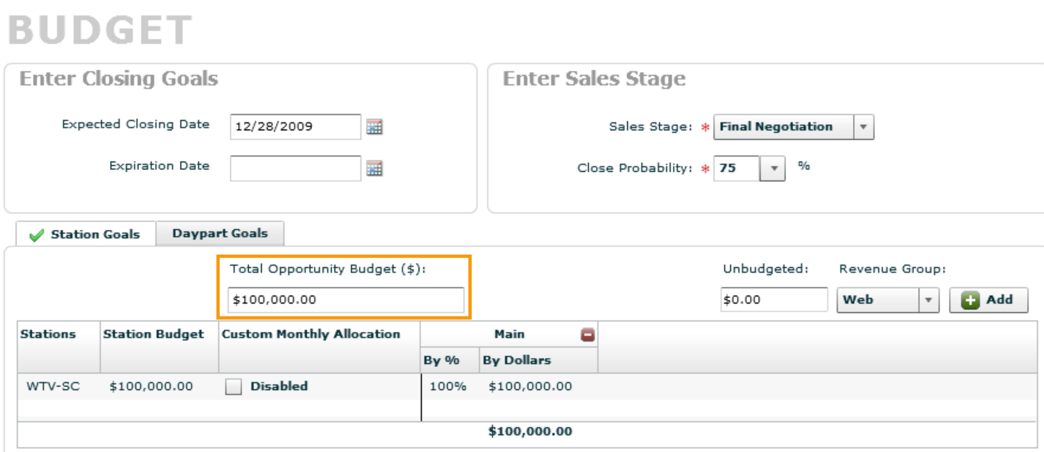
- Books appear on the left based on flight date.
- Limit the list of Books by utilizing filters at the top of the panel, accessed by clicking the word Filters or the arrow next to it. **Filters:**
- The Projection tab allows you to create an Estimate book on the fly that does not already exist. *Note: multi-book averages must be created in Ratings Management.*
- Flights will appear in the right-side panel. Highlight a flight on the right, and click the next to a book on the left to apply that book to the selected flight.
- If multiple books are applied to a flight, designate a **Primary** using the radio button.

Note: Calculations on the avail will be based on the primary rating book.



- Check “Add book to all Flights” if you want the same book to be associated with each flight.

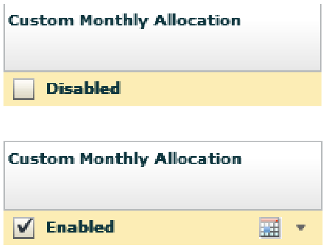
Budget

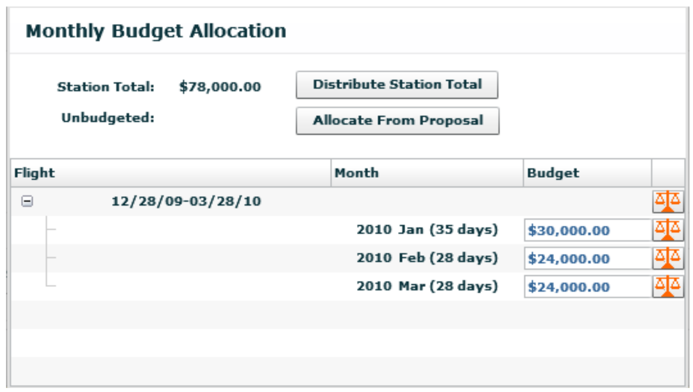


- Important to Budget & Forecasting and Pipeline reports for better management of expected inventory sellout and revenue and it also keeps your pending business updated.
- Set an **Expected Close Date** and/or an **Expiration Date,** which sets the date these rates expire. These are visual reminders for follow up.

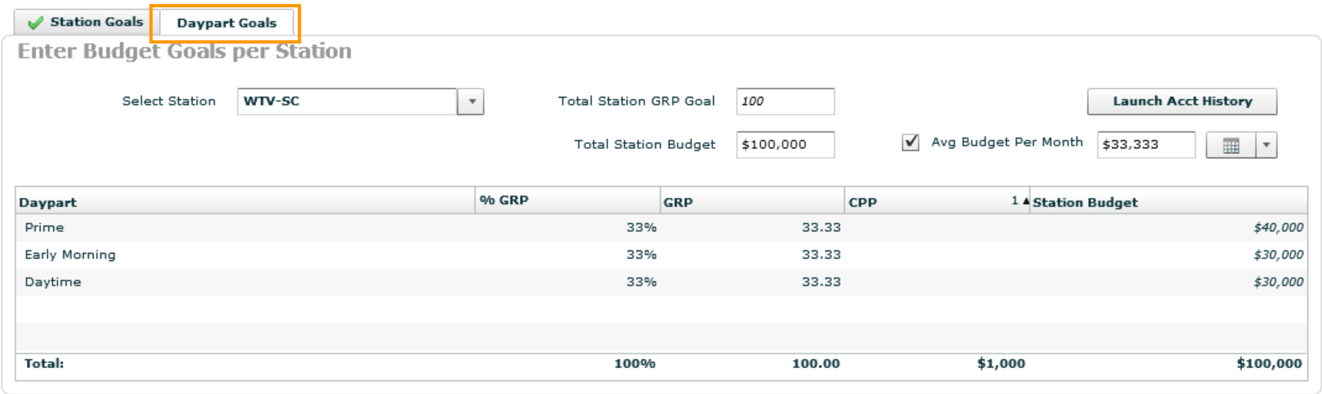
Budget (continued)

- **Sales Stages** are Station defined each with an assigned **Close Probability**.
- On the **Station Goals** tab enter a **Total Opportunity Budget** for the station only, not the market budget, which automatically updates pending dollar amounts in appropriate reports.
- The system automatically distributes the amount entered in the **Total Opportunity Budget** field evenly across months of the flight. Dollars are automatically assigned to the Stations's core Revenue Group. Allocate dollars to other revenue groups by adding the appropriate group from the pull down and entering a percentage or dollar amount in the appropriate cell.





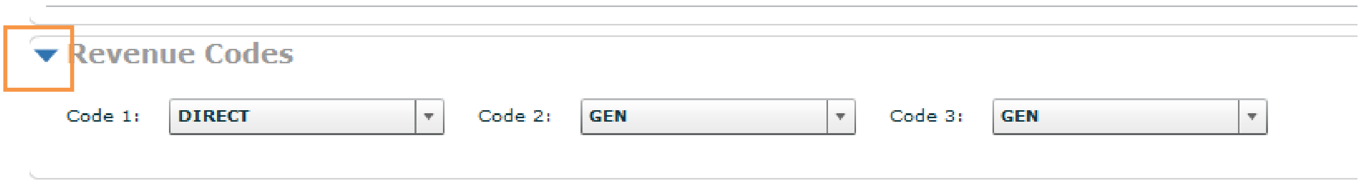
- Manually allocate dollars by clicking the **Disabled** checkbox which enables the **Monthly Budget Allocation** window.
  - Click into any budget cell to enter a custom amount.
  - The system will alert you to any unbudgeted dollar amount by printing the unbudgeted total at the top of the window in red.
  - Click the Scale icon next to a month to assign any unbudgeted amount to that portion of the flight.
  - Click the Scale icon next to the whole flight to evenly distribute unbudgeted dollars across the flight.
  - Once units have been added to a Proposal, click the **Allocate From Proposal** button to pull in dollars amounts from the Proposal.



- To make calculations based on client needs (GRP or CPP for example), on the **Daypart Goals** tab enter **Station GRP** or **Total Station Budget** and the information filters down to the Daypart breakout summary.

Budget (continued)

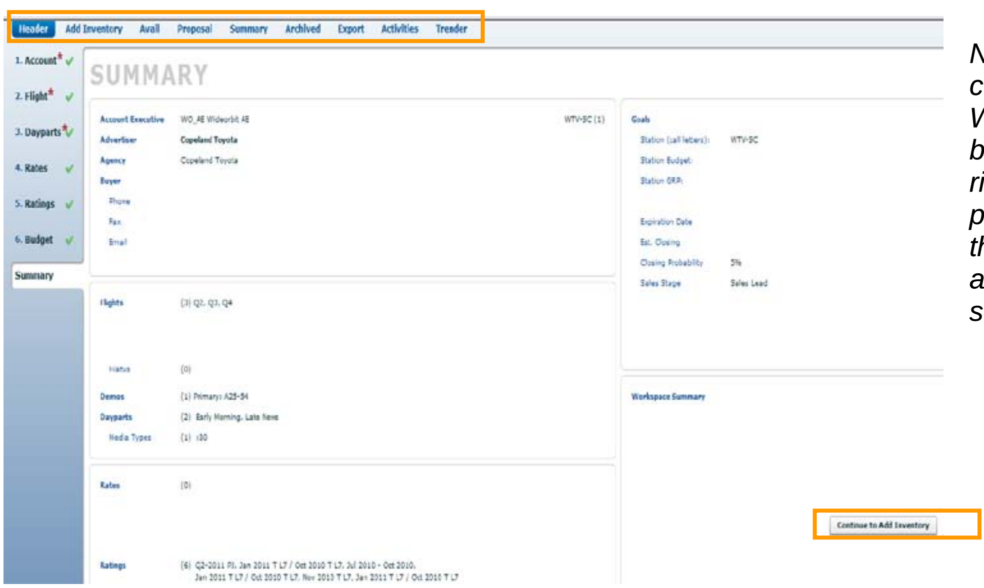
- From there adjust the GRP %, GRP, CPP and Station Budget in the individual cells as needed.
- Click Launch Acct History to open the WO Traffic report to view a client's past GRP, etc.
- Access the Monthly Budget Allocation window by clicking the calendar menu next to the Avg Budget Per Month field when that checkbox is selected.
- Custom allocate dollars or distribute from the Proposal in this window with the same functionality as from the Station Goals tab.



The Revenue Codes are located at the bottom of the Budget page and will autopopulate based on the Account information. You can change them here if it is necessary. Click the arrow to hide the information and gain more page real estate.

Summary

The Summary displays all of the selections made in the 6 sections.

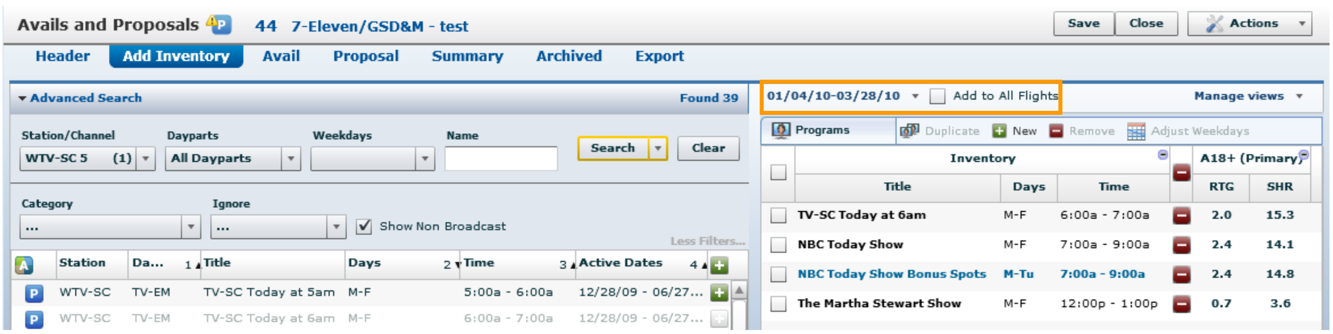


Note: You can continue to the Workspace with the button on the bottom right of the Summary page or by selecting the appropriate tab along the top of the screen.

Workspace

The workspace is the focal point for selecting inventory, manipulating ratings and pushing an Avail to an Order in *WO Traffic*. The workspace consists of nine tabs listed across the top of the screen; Header, Add Inventory, Avail, Proposal, Summary, Archived, Export, Activities and Trender. This document will cover the Add Inventory and Avail tabs.

Workspace (continued)



Note: Moving from the Header to the Workspace will save your Avail and assign a title and ID number.

Add Inventory

The screen consists of dual panels that allow you to select and edit Program inventory for your avail.

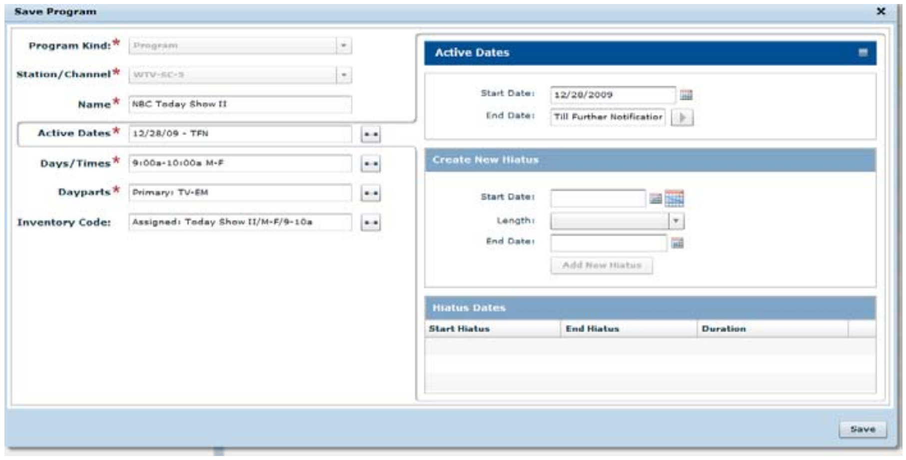
- If there are multiple flights, the flight drop down menu on the right side will default to All Flights and the selected inventory will apply to all flights. Inventory selected will have a line for each flight.
- To select a different flight, select the flight from the pull down menu, and uncheck the Add to All Flights box on the left side and add inventory to the selected flight.

Left Panel / Selecting Inventory

- Utilize filters across the top, allowing you to limit the Programs listed. Search quickly by Program name using the **Name** field or by **Daypart** and clicking Search.
- Inventory will populate the left panel based on flight dates. Select Flight and/or Hiatus on the **Ignore** filter to display any Program out of flight.
- Click the + to add inventory one line at a time. Once selected, the line will turn grey.
- To grab all inventory at once, select the + on the header next to Active Dates.
- To grab multiple lines, use the **Shift** or **Ctrl** keys, then drag and drop the lines on the right.
- The **Eligible Column** shows in which flights the program is available to be selected.

Right Panel / Adding Inventory to Flights

- To create a separate line of inventory, check the line and then click the **Duplicate** button. Duplicate a Program to create a no charge line for example.
  Edit which weekdays the program will air by clicking the **Adjust Weekdays** button.
- Tap on the **Program Title**, to open the Save Program screen.



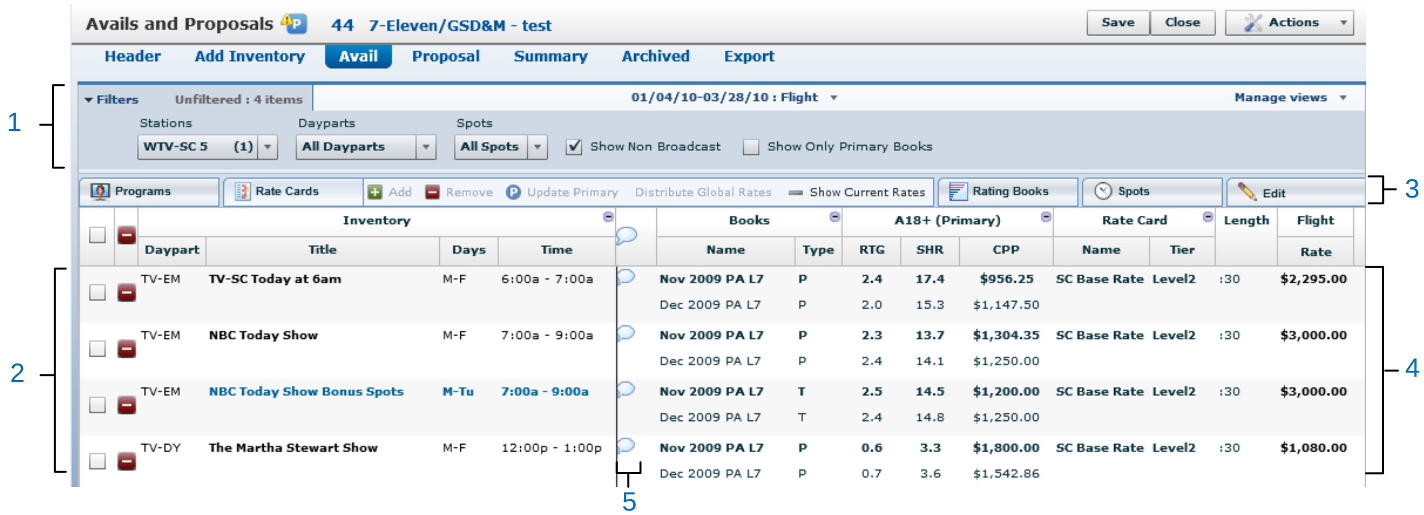
Select Name, Active Dates, Days/Times, Dayparts and/or Inventory Codes to edit the information. Create hiatus dates if you want and then save your work.

The **New** button allows you to create a new program on the fly and add it to all flights.

The **Header** bar allows you to go back into the header and make any changes.

Avail

Displays the selected inventory and allows you to apply avails to a rate card and previously created estimate books.



Avail Workspace

1. Use the Filters drop down menus to view a specific **Flight** or display additional **Spot Lengths**.
2. To add, edit or remove **Program** information, use the checkbox to select one or several rows.
3. Select any of the **tool bars** to open additional options.

   Programs - Duplicate, Create, Remove Programs or Adjust Weekdays.

   Rate Cards - Add, Remove or Update the Primary

- Select a Rate Card from the drop down menu then Add it or Update to be the Primary.

Avail (continued)

Ratings Books – Add, Remove, Sort Rating books, Add Competitive Stations or Report

- To add a book, highlight a row and select **Add** from the tool bar.
- If there are multiple books selected, you have the option to **Sort** which will change the Primary book designation. Or remove a book altogether.
- Ratings can be manually adjusted and will display in blue.
- Assuming at least one other station is selected in the Header from the Account window, **Adding Competitive Stations** will open a window allowing you to select stations to be added to any selected Inventory line. The system will add a reference line, in the Workspace only, displaying Competitors' ratings for the same time period and Primary rating book.
- The **Report** option will direct you to the **Trender** report.

Spots - Add Length, Remove Length, Heatmap and Auto-Adjust Rates

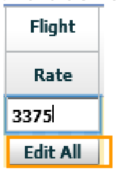
- The **Heatmap** checkbox allows you to view *WO Traffic* inventory levels for each Program.
    - Cells will display yellow, orange or red depending on the inventory sellout levels.
    - **Show Available Units** populates the screen with the latest inventory totals from *WO Traffic.*
    - **Auto-Adjust Rates,** when checked on, will adjust the rates for each spot length based on the Rate Card's offset percentage from the default length.

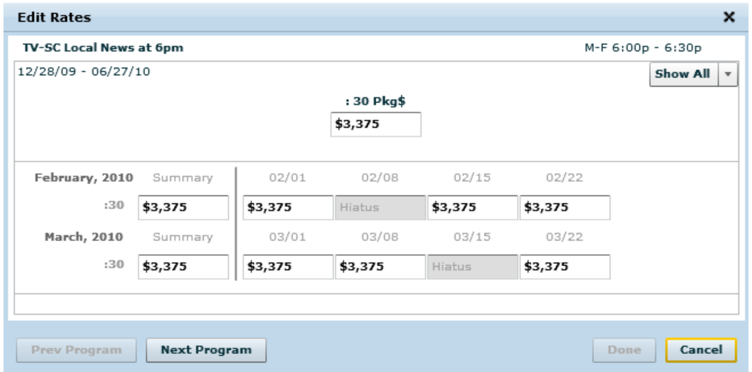
Note: if you adjust a rate prior to adding a new spot length, the rate will not auto-populate.

Header – Sends you back to the header to make adjustments to Account, Flight, Dayparts or Budget.

Edit – Copy Cell(s), Paste, Undo, Clear and Mass Edits.

4. Add **Rates.**
    - Rates in the body of the schedule populate from the selected Rate Card.
    - In Monthly or Flight view, a striped cell indicates a hiatus exists in that time period.
        - An arrow in the corner of the cell indicates you can hover over the cell to view a rate breakdown by Month or Week – the pop-up also lists hiatus dates and spot length.
    - Rates can be manually adjusted and will display in blue when changed. Change the Rates directly in the Rate field of each line by double-clicking into the cell and typing in the desired rate.
        - Only the Primary Rate Card's rates may be edited.
        - Click the Copy to Weeks arrow to carry rate to all subsequent weeks.
        - In Monthly or Flight Rates view, double-click in a rate cell to access the **Edit all** button to open the Edit Rates Window.





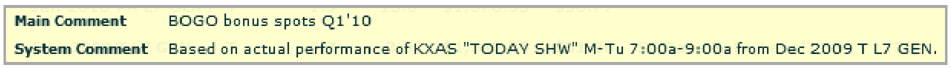
Edit Rates window

- Edit multiple Rates at once
- When multiple lengths are displayed, rates auto-adjust
- Move quickly between Programs

Avail (continued)

5. Add **Comments** or rationale to your inventory item by clicking on the comment field, represented by the Conversation Bubble icon .

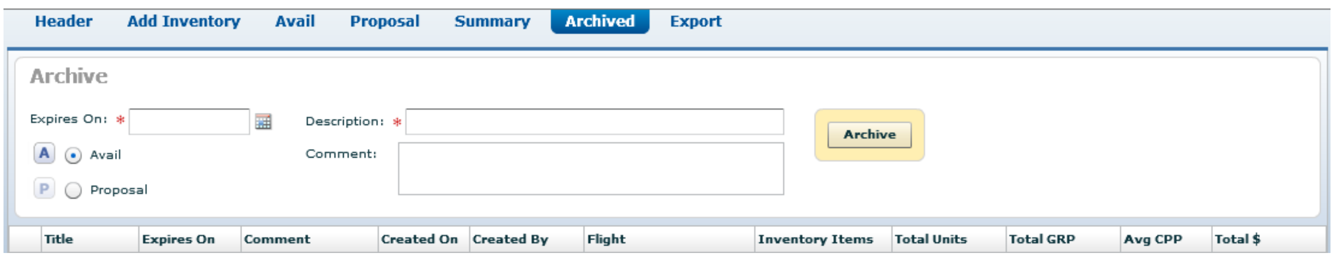
  - Hover your mouse over the Comment field to review any comments attached.



Once the avail is created there are several options for next steps. Here are the most common options.

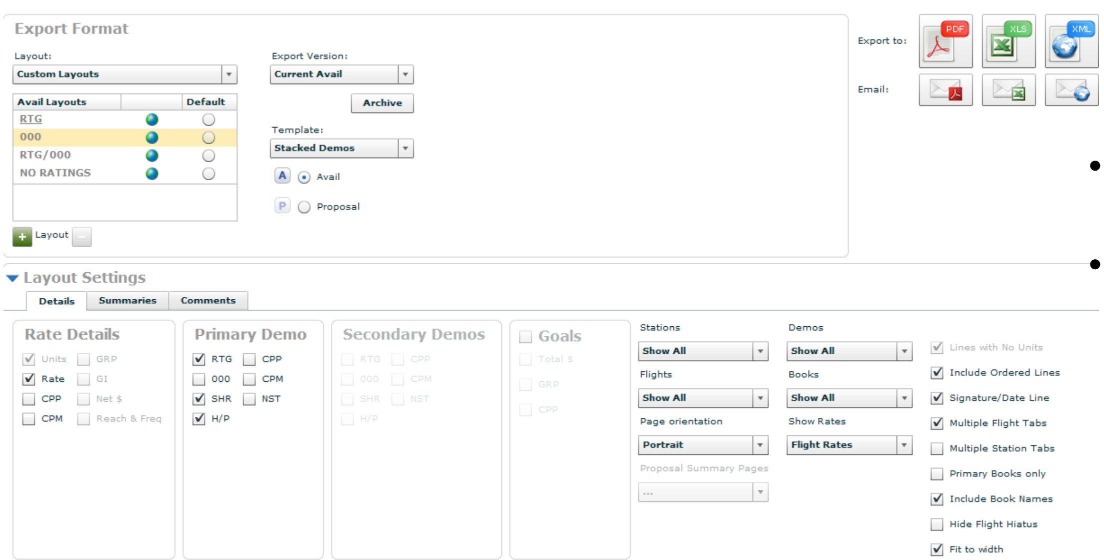
Proposal
Create a Proposal by selecting that tab, then create a package by allocating spots, adjusting rates and so on.

Archived



- Takes a snapshot of the Avail and saves a copy of the current version.

Export



- Export/Print your Avail to Excel or PDF.
- The Export screen allows you to select a Format, determine Layout Settings and change statistic display properties.

Actions Menu 

The menu is located on the top right-hand side of the Workspace.

- **Export to XML**
  Export your Avail to XML to be received electronically into software.

- **Submit Order Lines**
  Sends the selected lines in a Proposal/Avail to *WO Traffic* and creates an Order where you can continue to edit the lines and ready when you're done.

- **Set Sales Stage**
  The Sales State allows your station to track business throughout the negotiation and sales process.