WO Sales v2.1

WideOrbit WO Sales Training Guide



Avails and Proposals Creating Avails

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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.

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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.

WIDE

Description: *

Accounts

- In the **Advertiser** field type a few letters of the Advertiser name and the drop down list will autopopulate. 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.

FITCHT/HTATUS

- The Account tab will display a \Lambda 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

						1 Flig
Start Date	03/29/2010	Flight Title	Sta	art Flight	End Flight	
End Date	06/27/2010	01/04/	10-03/28/10 01	/04/10	03/28/10	
Hiatus	05/24/10-05/30/10				Select Flight t	hen Hiatus
Flight Title	Q2				▲ November	2010
Flight Type	Monthly Flights 🔹]			M T W Th	F Sa Su 5 6 7
+ Add Flig	ht Clear				8 9 10 11	12 13 14
					15 16 17 18	19 20 21

- Use the large calendar icon IIII 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.

WIDE

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.

AYPA	ARTS/SPO	OT LENGTH	S	
Select Daypa	rts			
Dayparts	Abbrev	2	3	Daypart(s)
arly Morning	TV-EM	🗖 🔺 🗧 Dayparts	1 Abbrev	
Daytime	TV-DY	E Early Morning	TV-EM	
Early Fringe	TV-EF	🔁 🗏 🗖 Daytime	TV-DY	
Early News	TV-EN	🔁 🗸 🧧 Prime	TV-PR	
Prime Access	TV-PA	E		
Prime	TV-PR			
.ate News	TV-LN	• •		
Select media Media Types C Name	types Custom spot	Media Types	1 Me	Select media types
 Broadcast 		Broadcast:30		Media Types Custom spot
- Spot: 05		■ _		
- Spot: 10				
- Spot: 15		•		Spot length:
- Spot: 30				
- Spot: 28:30				

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.

Select Dayparts				
	✓ Add all eligible inventory	Filter weekdays:	М-Е 💌	Restrict days

• 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**.

Select Rate Cards a	nd Tiers			
Avail Rates:	🔵 Global 🔵 Weekly 🔵 Monthly	• F	ight	
Proposal Rates:	🔵 Global 💿 Weekly 🔵 Monthly	O F	ight	
■ 5 - WTV-SC (2)	Rate Tiers			2 Rate card
SC Base Rate Card	Level1		Primary	Rate Tiers
	Level2		•	5 - WTV-SC
	Level3		•	SC Base Rate Card - Level2
				SC Base Rate Card - Level3

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 solution 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.

🗹 Add book to a	II Flights	
Station / Flight	Book	Primary
⊟ WTV-SC		
⊟ Q2		
-	Q2-2011 PJ	
	Jan 2011 T L7 / Oct 2010 T L7	\bigcirc
🗏 Q3		
	Jul 2010 - Oct 2010	۲
	Jan 2011 T L7 / Oct 2010 T L7	\bigcirc
E 04		

• Check "Add book to all Flights" if you want the same book to be associated with each flight.

Budget

BUD	GET							
Enter C	losing Goals	;		Enter S	ale	s Stage		
Expe	cted Closing Date	12/28/2009				Sales Stage: *	Final Negotiatio	n v
	Expiration Date				Clos	e Probability: 🗚	75 🔻 %	
🖌 Statio	n Goals Daypa	rt Goals						
		Total Opportunity Budget (\$):				Unbudgeted:	Revenue Group:
		\$100,000.00					\$0.00	Web 🔻 🔂 Add
Stations	Station Budget	Custom Monthly Allocation		Main				
			Ву %	By Dollars				
WTV-SC	\$100,000.00	Disabled	100%	\$100,000.00				
			1	\$100,000.00				

- 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.



- 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.

Custom Monthly Allocatio	n	N	Monthly Budge	et Allocation			
Disabled			Station Total: Unbudgeted:	\$78,000.00	Distribute Station Total Allocate From Proposal		
Custom Monthly Allocatio	n	Flig	ght		Month	Budget	
✓ Enabled		8	12/28/	09-03/28/10	2010 Jan (35 davs)	\$30,000,00	ন্দ্র হার
			_		2010 Feb (28 days)	\$24,000.00	
					2010 Mar (28 days)	\$24,000.00	<u>a</u> a

- 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.

Station Goals Daypar	t Goals					
Enter Budget Goals	per Station					
Select Station	WTV-SC	т	otal Station GRP Goal	100		Launch Acct History
			Total Station Budget	\$100,000	✔ Avg Budget Per Month	\$33,333
Daypart		% GRP	GRP	CPP	> 1 ▲ Station Bu	ıdget
Prime			33%	33.33		\$40,000
Early Morning			33%	33.33		\$30,000
Daytime			33%	33.33		\$30,000
Total:			100%	100.00	\$1,000	\$100,000

• 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.

- 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.

Revenu	ie Codes								
Code 1:	DIRECT	*	Code 2:	GEN	*	Code 3:	GEN	•	

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.



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.

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Workspace (continued)

Avails and Proposals 🐏 44 7-Eleven/GSD&M - test				[Save Close		🔏 Асtі	ons 🔻
Header Add Inventory Avail Proposal Summary Archived	Export							
▼ Advanced Search	Found 39	01/04	4/10-03/28/10 🔻 🗌 Add to	All Flights	5		Manage v	iews 🔻
Station/Channel Dayparts Weekdays Name		(rograms 🙀 Duplicate 🚦	New	Remove 🔛 Ad	just V	Veekdays	
WTV-SC 5 (1) v All Dayparts v v	2arch 🔻 Clear		Invento	ory	e		A18+ (P	rimary)?
Cabaaaa Taasa			Title	Days	Time	-	RTG	SHR
v Show Non Broadcast		1	IV-SC Today at 6am	M-F	6:00a - 7:00a		2.0	15.3
	Less Filters		NBC Today Show	M-F	7:00a - 9:00a		2.4	14.1
Station Da 1 Title Days 2 Time 3 Action	ive Dates 4 🛓 🛨		NBC Today Show Bonus Spots	M-Tu	7:00a - 9:00a		2.4	14.8
P WTV-SC TV-EM TV-SC Today at 5am M-F 5:00a - 6:00a 12/2	28/09 - 06/27 🚹 📥	1	The Martha Stewart Show	M-F	12:00p - 1:00p		0.7	3.6
🛛 🕑 WTV-SC TV-EM TV-SC Today at 6am M-F 6:00a - 7:00a 12/3	28/09 - 06/27 🔢					-		

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
 Inventory at once, select the
- 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.

g Avails				WIDEORBIT
Save Program				× V
Program Kind:*	Program		Active Dates	_
Station/Channel*	WTV-SC-3			
Name*	NBC Today Show II		Start Date: 12/20/2009	
Active Dates*	12/28/09 - TFN		Till Further Notification	Select Name, Active Da
Days/Times*	9:00a-10:00a M-F		Create New Hiatus	Days/Times, Dayparts
Dayparts*	Primary: TV-EM		Start Date:	and/or Inventory Codes
Inventory Code:	Assigned: Today Show II/M-F/9-10a	••	End Date:	edit the information. Cre hiatus dates if you want
			Hiatus Dates	then save your work.
			Start Hiatus End Hiatus Duration	

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

Header	Account	Flights	Dayparts	Budget
--------	---------	---------	----------	--------

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.

		Avails and P	roposals 擾 🛛 4	14 7-Eleven	/GSD&I	M - test							Save	Close	× *	ctions •	
		Header	Add Inventory	Avail Pro	posal	Summary	Arc	hived Export									
	Г	▼ Filters Unf	iltered : 4 items				01,	/04/10-03/28/10:	light 🔻						Manag	je views 🔻	
1 -		Stations WTV-SC	5 (1) TAIL Daypa	arts ayparts 🔻	Spots All Sp	ots 🔻 🗹 Sha	ow Non	Broadcast 📃 Sh	ow Only F	Primary B	ooks						
		Programs	Rate Cards	🛨 Add 듣	Remove	🕑 Update Primar	ry Dis	stribute Global Rates	— Show	Current Ra	ates F	Rating Books	Spots		N Ed	lit]- 3
		Inventory			•		Books		A	A18+ (Primary)		Rate Card 😑		Length Flight	Flight		
		Daypart	: Title		Days	Time	2	Name	Туре	RTG	SHR	СРР	Name	Tier		Rate	
	Γ		TV-SC Today at 6an	n	M-F	6:00a - 7:00a		Nov 2009 PA L7	P	2.4	17.4	\$956.25	SC Base Rate	Level2	:30	\$2,295.00	
	Ш	7. 54	NDGT I G			7	h	Dec 2009 PA L7	P	2.0	13.3	\$1,147.50				#2.000.00	
2 -			NBC loday Snow		M-F	7:00a - 9:00a		Dec 2009 PA L7	P	2.3	14.1	\$1,250.00	SC Base Rate	Level2	:30	\$3,000.00	4
~		TV-EM	NBC Today Show Bo	onus Spots	M-Tu	7:00a - 9:00a		Nov 2009 PA L7	т	2.5	14.5	\$1,200.00	SC Base Rate	Level2	:30	\$3,000.00	
	Ш							Dec 2009 PA L7	т	2.4	14.8	\$1,250.00					
	L		The Martha Stewart	Show	M-F	12:00p - 1:00p		Nov 2009 PA L7 Dec 2009 PA L7	р Р	0.6	3.3 3.6	\$1,800.00 \$1,542.86	SC Base Rate	Level2	:30	\$1,080.00	
	- 1						1										

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.



2/28/09 - 06/27/	/10					Show All
			: 30 Pkg\$			
			\$3,375			
February, 2010	Summary	02/01	02/08	02/15	02/22	
:30	\$3,375	\$3,375	Hiatus	\$3,375	\$3,375	
March, 2010	Summary	03/01	03/08	03/15	03/22	
:30	\$3,375	\$3,375	\$3,375	Hiatus	\$3,375	

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

```
        Main Comment
        BOGO bonus spots Q1'10

        System Comment
        Based on actual performance of KXAS "TODAY SHW" M-Tu 7:00a-9:00a from Dec 2009 T L7 GEN.
```

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

	Header A	dd Inventory	Avail Pro	posal S	ummary 🗾	rchived	Export					
	Archive											
E	Expires On: * Description: *											
	A o Avail Comment:											
	P O Propos	al										
	1				1					1		
	Title	Expires On	Comment	Created On	Created By	Flight		Inventory Items	Total Units	Total GRP	Avg CPP	Total \$

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

Export

Export Format Layout: Custom Layouts Avail Layouts RTG 000 000 000 NO RATINGS Layout	Export Vers Current Av Default Current Av Stacked D Av P P Pr	ion: rail v Archive emos v rail oposal				Export to: Email:		 Export/Print your Avail to Excel or PDF.
 ✓ Layout Settings Details Summaries C Rate Details ✓ Units GRP ✓ Rate GRI ⊂ CPP Hat S ⊂ CPM Reach & Freq 	Comments Primary Demo ✓ RTG CPP 000 CPM ✓ SHR NST ✓ H/P	Secondary Demos RTG CPP 000 CPM SHR HST HVP HVP	Goals Total \$ GRP CPP	Stations Show All Flights Show All Page orientation Portrait Proposal Summary Pages Trained State Proposal Summary Pages Trained State Proposal Summary Pages Trained State Proposal State	Demos Show All Books Show All Show Rates Flight Rate	• • • •5 • •	Lines with No Units Include Ordered Lines Signature/Date Line Multiple Flight Tabs Multiple Station Tabs Primary Books only Include Book Names Hide Flight Hiatus V Fit to width	 The Export screen allows you to select a Format, determine Layout Settings and change statistic display properties.

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

• Export to XML

Actions Menu

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.