WO Sales v2.1

WideOrbit WO Sales Training Guide



# **Avails and Proposals**

**Creating Proposals from Avails** 

#### **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.



# **Table of contents**

# **Creating Proposals from Avails**

Avail	3
Proposal Workspace	3
Filter for Flight and Spot Length	3
Flight View	3
Manage Views	3
External Updates	4
Tool Bar Options	4
Rates and Units	4
Summary	4
Export	5
Archive	5
Actions Menu	5
Export to XML	5
Submit Order Lines	5
Set Sales Stage	5



#### **Creating Proposals from Avails**

Avails and Proposals provide the main workspace for creating and analyzing your pre-buy materials. Below is a list of steps and tips to quickly create a Proposal from an existing Avail.

#### **Opportunities / Avails and Proposals**

Search for a current schedule within any Sales Stage, then double click on the appropriate one to open it.

Avails and Proposals											
- Advanced Search	Q Filter							Manage views 🔻			
Stations Sales Sales	Stage Acc	count Executive	Age	Agency	Advertiser	Flight	•	Search 🔻 Clear			
Id Current	New Prospect Avail	•									
I. 1	Proposal Final Negotiation	ons Ad	dvertiser	Flight Dates	Account Executive	Amount	Weighted Pending	Less Filters			
	Closed Won										
	Closed Lost										

#### Avail

**Proposal** 

- The avail will open to the tab it was last closed on.
- Changes or additions to Flights, Demos and Dayparts must be done from the Header to ensure the • information filters through to the Proposal workspace.
- It is possible to edit the Add Inventory and/or Avail tabs before moving on to the Proposal tab. •

	_	Avails and Pr	oposals 4	🕗 44 7-El	even/GSI	D&M - te	est							Save	Close	🛛 🔏 Act	ions v	- 4
1-	Header Add Inventory Avail Proposal Summary Archived Export           Filters       Unfiltered: 4 items         01/04/10-03/28/10: Weekly         - 2       Manage views         3       3																	
		👰 Programs	Rate	Cards	Rating Book	s (C	Spots		Edit	Copy	Cell(s)	Paste	🕤 Undo 🗮	Clear 🗾	Mass Edit		-	<b> - 6</b>
_			Inventory Title	-	Rate Card	Nam	e H/	P RTG	L8+ (Primary) SHR CPI	срм	Length	01/04/10 Rate	01/11/10 Rate	01/18/10 Rate	01/25/10 Rate	02/01/10 Rate	02/08/ A	
5 -		M-F 6:00a	<b>/-SC Today a</b> - 7:00a	t 6am 🚽 💭	Level2	Nov 200 Dec 200	9 P 🔹 13 9 P 💽 12	2.9 2.0	<b>17.4 \$956</b> 15.3 \$1,147	25 \$18.90	:30	2295 )( 1	\$2,295.00	\$2,295.00 1	\$2,295.00 1	\$2,295.00 1	\$2,295. 1	<b>┣</b> 7
_		4	• •				11111										Þ	
	ĺ	Summary type General Summary	· ·	Flights 01/04/10-03	/28/10		emos A18+		▼ <b>√</b> s	how N-Reach	N-Re 3	each v				R	efresh 🔻	
8-	s	Station(s)	Units	Total \$	GRP	GI	Reach	Frequency	/ Net Reach	N-Reach	СРГ	<b>)</b>	СРМ	Universe	•			
		All Stations	12	\$27,540.00	28.8	1,456.8	11.5	2.5	584.4	9.9	\$95	6.25	\$18.90	5,081.7				-
		WTV-SC	12	\$27,540.00	28.8	1,456.8	11.5	2.5	584.4	9.9	\$95	6.25	\$18.90	5,081.7				

- 1. Use the Filters drop down menus to edit a specific Station, work with a particular Davpart or display additional **Spot Lengths.** To quickly minimize the amount of displayed information, you can mark the Show Only Primary Books or Show Only Programs with Units checkboxes.
- 2. Use the Flight View menu to select a flight, view Weekly, Monthly or Quarterly Rates or choose to display Global or All Rates.
- 3. The Manage Views menu allows you to display Intra-Week Reach & Frequency\*, display Flight or Monthly rates as an average or highest, and set decimal precision. \* Adjusted Reach and Frequency of the specific weekdays of the Program vs the whole program week.

Version 2.1-111904



- The system will check for any changes to Rates, Ratings, Program Titles, Air Dates or Air Times of Programs since the Avail was originally created. You may need to edit rates based on these changes before making decisions about rates and the allocation of units.
  - Items that have changed will appear in red on the screen.
  - From the actions menu select **Apply external updates** to update the Proposal with the changes.

WIDE

- 5. To add, edit or remove information, use the checkbox on the left to select one or several Program lines.
- 6. Select any of the Tool Bars to open additional options.
  - Rate Cards/Show Current Rates will add a reference line in the body of the Workspace displaying current Rate Card rates. This could be useful if you have made multiple edits to rates and wish to view current rates. Note that this line will appear in the Workspace only and will not print on exported versions.
  - **Spots/Heatmap** mark the Heatmap checkbox which allows you to view *WO Traffic* inventory levels. Cells will display yellow, orange or red depending on the inventory sellout levels.
  - **Spots/Heatmap/Show Available Units** populates the screen with the latest inventory totals from *WO Traffic.*
  - **Spots/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 automatically adjust.*
  - Edit/Mass Edit clicking opens the Mass Edit window which offers the ability to populate both Rates and Units. Changes may be applied by Percent, +/- Increment or New Rate/Unit (specific amount). Choose a spot length to apply changes to via the Lengths pull down menu.
- 7. Add Units or update Rates.
  - Add **Units** to the Proposal by double-clicking into any Unit cell and entering the desired number.
  - Change **Rates** directly in the Rate field of each line by double-clicking in any Rate cell. Edited rates will display in blue.
  - Clicking the **Edit all** button opens the Edit Rates & Units window where you can quickly apply Rate and/or Unit changes to multiple weeks/months.
  - In Weekly view, Rates and Units can be entered once and copied to subsequent weeks with the use of the copy to weeks arrow.
- 8. **Summary** footer toggle on/off in Flight View menu
  - Refer to the **Summary** in the lower portion of the screen to view where your proposal stands in terms of dollars, efficiency, budget, reach and frequency as you manipulate Units/Rates/Ratings.

		N-Reach							
✔ Sh	ow N-Reach	3	*						
Reach	Frequency	Net Reach	N-Reach						

#### N-Reach

- Mark the Show N-Reach checkbox and select a number (representing a Frequency level) in the N-Reach pull down menu.
- The N-Reach column in the Summary will display a subset of the overall Reach relative to only viewers that see the spot X number of times or the Reach against that specific Freqency. X = the number selected in the N-Reach pull down.

#### **Proposal (continued)**

Once a Proposal is created there are several options to continuing on. Here are the most common options.

#### Export

Free and Free and						
Export Format			Export Email	Vould you like to	Archive now?	
Export Version:	Proposal Layouts	Default		Version Inf	ormation	
Current Proposal *	Demo Default	$\overline{\bullet}$		_		
Export as XLS V				Description: * te	est	
				Expires On: *		
A O Avail				Comment:		
Proposal						
	the Lawourt					
	Layout					Archive
Layout Settings						
Dotaile Summaries Comments						
Details Summercs commerces						
Rate Details Primary	Demo Secondary	Demos	Goals	plate	Demos	
			Total \$	-stacked Demo 🔻	Show All 🔻	Lines with No Units
✓ Rate GI SHR			Stati	ons	Books	✓ Submitted product
CPP Net \$ H/P	NST H/P NS	Т	GRP	v All 🔹	Show All 🔻	✔ Signature/Date Lin
CPM Reach & Freq V 000			CPP	te	Show Bates	Multi-Elizabe
			Char		Clabel Bate (lasse	Multi-Flight
			Snot	w All	Global Rate (legac 🕴	Multi-Station
			Page	e orientation:	Proposal Summaries	Primary Books only
			Port	trait •	··· *	Z Taskuda Dask Massu

- Choose Format Options to include in the export.
  - Select the Avail or Proposal radio button.
  - Select a default Layout which is a pre-formatted template. Or customize Layout Settings by selecting details to include from the Layout Settings tabs.
  - From the drop down menu, select a format; Export as XLS (Excel), PDF or XML.
  - In the upper right corner of the screen you have the options to Export the Proposal, attach it to an Email and/or Archive a copy of the Proposal in its current state.

#### Archive

• Takes a snapshot of the Proposal and saves that version on the **Archived** tab.

Header Add Invent	ory Avail	Proposal S	ummary	Versions	Export					
Archive										
Expires On: *	De	scription: *				Archive				
A O Avail	Co	mment:								
Proposal										
Title	Expires On	Comment	Created On	Created By	Flight	Inventory Items	Total Units	Total GRP	Avg CPP	Total \$
Proposal	12/01/09	Submitted to Client.	06/01/10	Administrator	12/28/09 - 02/28/10		4			\$0.00

## **Actions Menu**

## Export to XML

• Export your Proposal to XML to be received electronically into software.

#### Submit Order Lines

• Sends the Proposal to WO Traffic where you can continue to edit the lines and ready the Order.

#### Sales Stage

• Set the Sales Stage to update all WO Sales reports.

WIDE