

WO Sales v2.1

WideOrbit WO Sales Training Guide



Avails and Proposals

Creating Proposals from Avails

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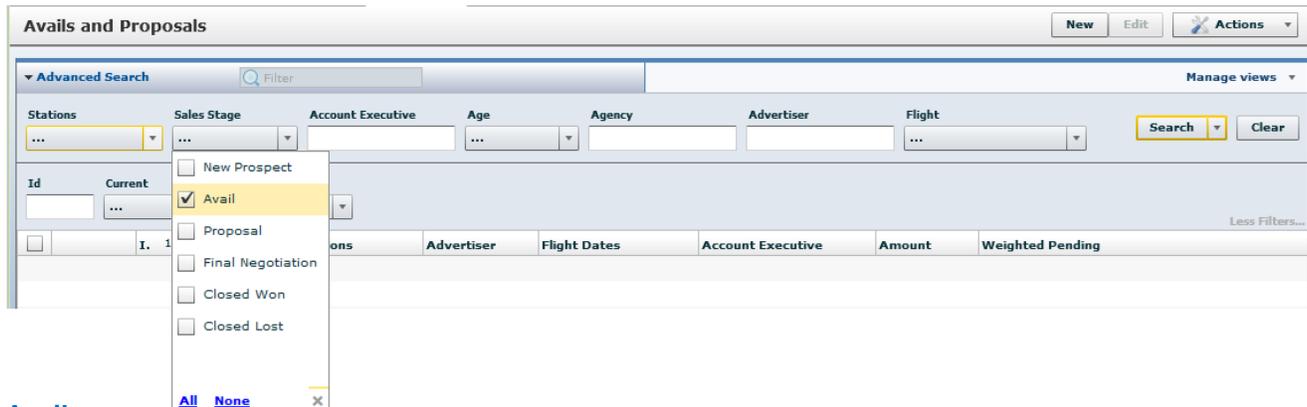


Creating Proposals from Avails

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

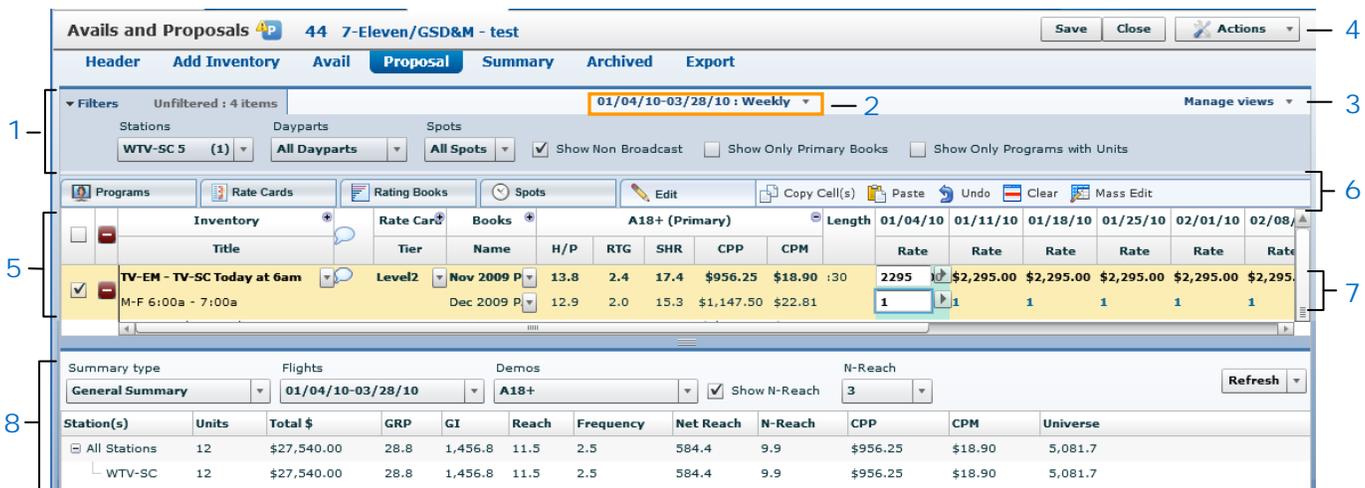
- Search for a current schedule within any **Sales Stage**, then double click on the appropriate one to open it.



Avail

- 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.

Proposal



1. Use the Filters drop down menus to edit a specific **Station**, work with a particular **Daypart** 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.*



4. From the **Actions** menu select **Check for external updates** – and check the corresponding **Show external updates** on the Flight View menu.
 - 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.

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			
<input checked="" type="checkbox"/> Show N-Reach	3		
Reach	Frequency	Net Reach	N-Reach
3.1	3.9	95.1	2.8

N-Reach

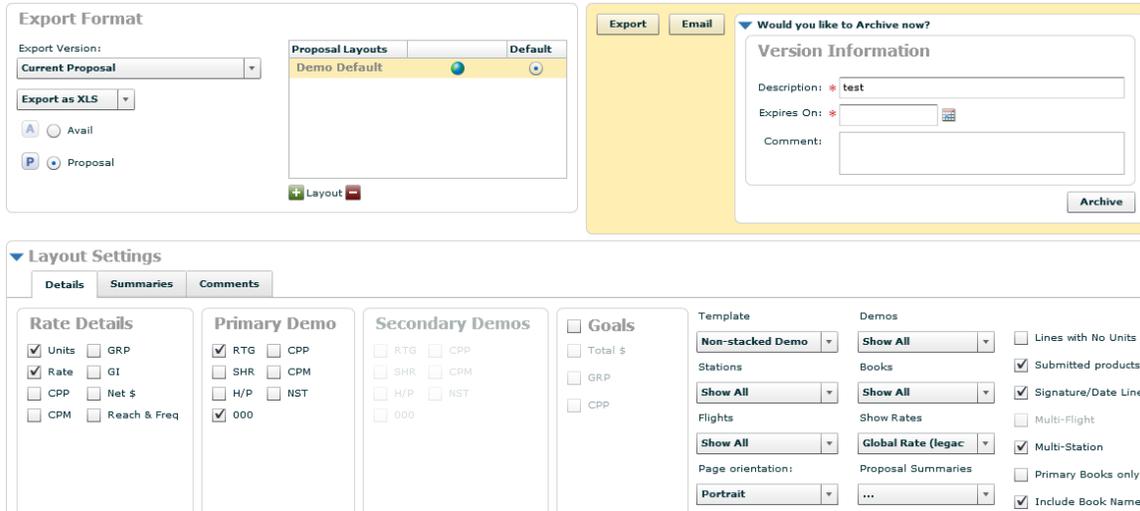
- Mark the **Show N-Reach** checkbox and select a number (representing a Frequency level) in the N-Reach pull down menu.
- The N-Reach column in the Summary will display a subset of the overall Reach relative to only viewers that see the spot X number of times or the Reach against that specific Frequency.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



- 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.



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.