WO Sales v2.1

WideOrbit
WO Sales **Training Guide**

Ratings Management
Creating and Editing Estimates

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Creating and Editing Estimates

When PAVs are mapped you can create Projection and Estimate books. Below you will find the steps required to create an Estimate book.

Creating Estimates

- From the Home tab, select Ratings Management, then Books. Click **Search** on the top right-hand side of the window to return a list of books currently available.

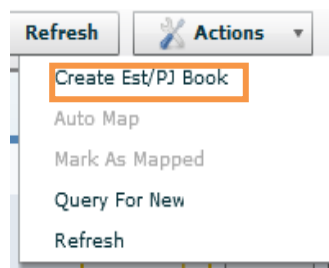- From the **Actions** drop down menu select **Create Est/PJ Book**. *(Figure 1)*
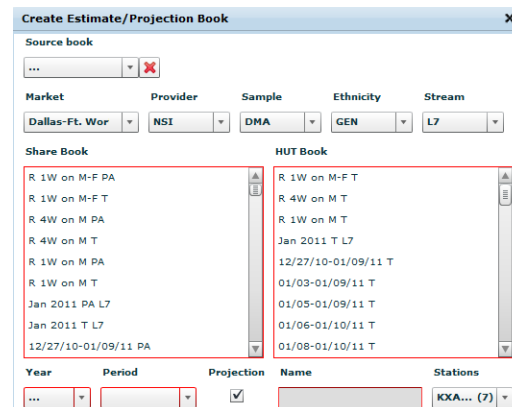

Figure 1

Figure 2

- This activates a popup menu (*Figure 2*) where you select the Share and HUT books you wish to use for your initial calculation.

- A red highlight box will appear to outline all required information.

- In the Period window you will also select the year/month/quarter you are creating the book for.

- The system defaults to creating a Projection book, but you can simply uncheck the box under **Projection** to create an editable Estimate book.

- The Name field will auto fill with the year and month/quarter information you provided.

- Click **Create** once all of the selections are made.

Editing Estimates

Open the estimate book you would like to edit from the search results list.

Highlight a Program, double click on it or click **Edit Estimate** in the upper right hand corner, this opens the Estimate Editor (*Figure 3*).
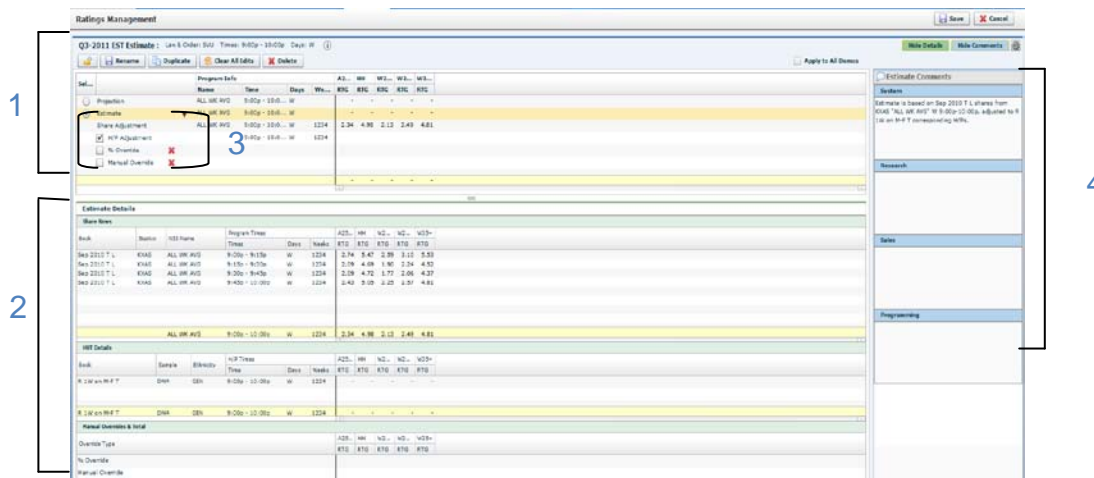

Figure 3

1. **Top Pane –** recaps the Projection calculated when the book was created as well as the initial Estimate line which matches the existing Projection. Multiple estimates can be created for a single program: you can simply click the radio button in the Select column to choose the estimate you wish to apply. This selection can be changed at any time without having to delete any unused estimates.

2. **Bottom Pane –** details the elements that make up the initial Estimate data. The share data will be based on the program mapping for that program/book, and the HUT data will reflect the viewing levels for the air time of the show for that book. Additionally, if any manual adjustments were made, they would be reflected in the bottom row of this details area.

3. **Estimate Editor –** utllize the options here to make adjustments to the fields you wish to edit by either a set amount or by a percent. Adjustments can be made to individual demos or all demos.

    Note: If editing by a percent you will only need to type the percent amount in the field; for example if the adjustment is going to be 10% simply type the number 10 in the given field.

    Advanced Estimate Editor is accessed here by double clicking on the different lines and where you may edit the data selections from Share and HUT books.

4. **Comments –** the top portion of the "Comments" area provides system created comments, this area will update automatically to reflect any adjustments made. Additionally there are three customizable comment fields that may be used.

Advanced Estimate Editor

Top Panel – This is where you will make the choice about the type of adjustment you would like to make. From the top panel, you may choose to execute a "Share Adjustment, "H/P adjustment," "%"override or a "Manual" override by clicking in the associated fields. You can also rename your estimate or duplicate the projection and estimate by clicking the buttons over the top panel.

Bottom Pane – the workspace will show the data that the existing ratings are based off of. Utilize this workspace to make any adjustments. You may select/deselect any of the books currently selected. The filters at the top of this workspace also provide you with an array of choices. Make sure you check the "Apply to All Demos" box so any changes made will apply to all demos.

To make a **Share Adjustment** or **H/P Adjustment**, click on the line and use the Type, Provider and Filter areas to make any adjustments.
- The Type dropdown allows you to select an overnight book rather than or in addition to a book.
- The **Provider** filters allow you to change the book you wish to use.
- **Filters** allow you to search for programs on other stations and/or airing at other times/days.

Note: The associated filters available in the workspace will be dependent upon the row selected in the top pane of the window.

- Click on the grey arrows next to each of the headers to expand that section. Once the adjustments are complete in this bottom pane click adjust to confirm the changes, which will then appear in the top pane.

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To make a **% Override** or **Manual Override,** click in the box next to the change. Next click on the space in the area you want to change, and insert the changes.

Sel...		Program Info				A25-54			HH			
		Name	Time	Days	We...	RTG	SHR	H/P	RTG	SHR	H/P	
○	Projection	ALL WK AVG	8:00p - 11:0...	M-F		3.12	7.45	41.92	5.52	9.10	60.69	
◉	Estimate ▼	ALL WK AVG	8:00p - 10:0...	M-F		2.28	7.60	29.97	4.32	9.18	47.02	
	Share Adjustment	ALL WK AVG	8:00p - 10:0...	M-F	1234	2.69	7.60	35.35	5.13	9.18	55.95	
☑	H/P Adjustment		7:00p - 11:0...	Su	1234			29.97			47.02	
☐	% Override ✖											
☐	Manual Override ✖											

When you're finished making all of your adjustments, click **Save** on the top right. You'll be taken back to the initial Estimate screen, which will reflect your changes.