

WO Sales v2.1

WideOrbit WO Sales Training Guide



Editing Avails and Proposals

Edits Made in the Workspace

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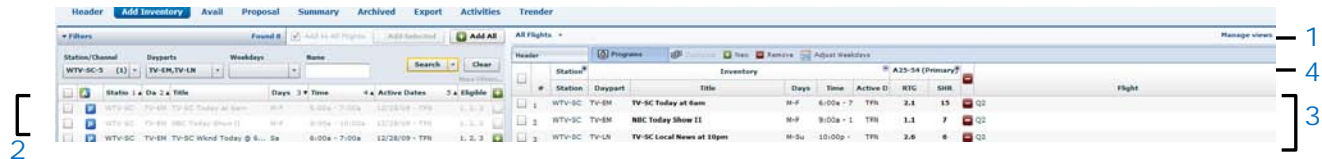
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Adding, Removing and Sorting Inventory


Within an existing Avail or Proposal there are several ways to edit inventory. Below is a collection of tips for simply and efficiently editing program Inventory.



1. Manage Views

- Select the **Manage Columns** menu option to open the **Edit Column View** window.
- Configure the workspace with columns of data and available options best suiting your needs.
For example: selecting **Delete** in the column view window, adds the  icon in the workspace on the Inventory, Avail and Proposal tabs.

2. Inventory Pane

- Use the  icon to add Inventory to the Programs panel on the right.
- Use the "Ctrl" or Shift keys to multiselect Inventory, then drag and drop the lines into the Programs panel.
- Once a Program is selected it will display in grey on the left panel.

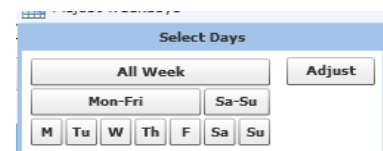
Note: If Inventory is deleted from either the Avail or Proposal tabs, it can always be reselected from the Inventory screen.

3. Programs Pane

- Programs listed here are sorted in the order by which they were selected.
- Re-sorting these Programs may be done by simply dragging and dropping the Programs in this panel into any order you choose.

4. Tool Bar Options

- The Tool bar options in the Inventory Pane allow you to **Duplicate**, **Add** and **Remove** programs.
- To edit the programs in the list, select them using the checkboxes to their left. To select all programs in the list, click the select all box at the top of the column.
- Clicking **Adjust Weekdays** opens a drop down that then allows you to select the whole week, all weekdays, the weekend only or individual days to include with the selected inventory.



Program Properties

Save Program

Program Kind:

Station/Channel:

Name:

Active Dates:  

Days/Times: 

Dayparts: 

Inventory Code: 

- Click through on the title of any Program to edit that Program's properties for this schedule.
- Change Name, Active Dates, Days/Times, Dayparts or the Inventory Code this Program is associated with in the Program Properties window.

Note: On the Avail and Proposal tabs, the system allows you to make these same changes to Program inventory. Click through on a title to open the Program Properties, or use the options in the Programs tool bar to make necessary changes.

Changing Spot Lengths and Units

On the Avail or Proposal tab click the **Spots** tool bar option to affect spot lengths. Unit edits are accessed similarly by either clicking in the Units field or using the Edit tool bar option.

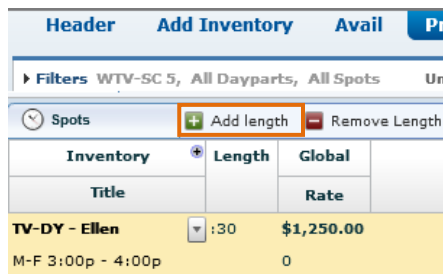
Spot Lengths

Spot Lengths are assigned to an Avail or to a Proposal in Header properties when it is created.

- Adding lengths to and deleting lengths from existing Program Inventory lines must be done via the Workspace. Select one or multiple lines to edit using the checkboxes to the left of the lines.

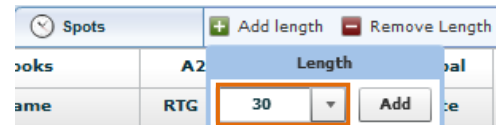
Note: This functionality is the same within Avails and Proposals.

Adding Spot Lengths



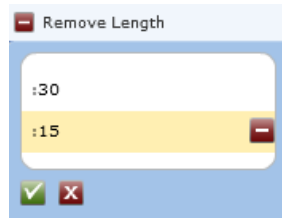
- From the **Spots** tool bar click **Add Length** to open the Length menu.



- In the Length field, type in the spot length and click **Add**.
- The pull down menu displays the lengths that were assigned in the Header. You may select a length from this list.

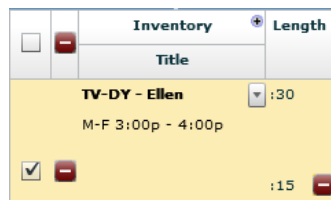



Note: Lengths must be entered in seconds.

Deleting Spot Lengths



- Click **Remove Length** from the Spots tool bar menu if you would like to remove a selected length assigned to multiple Programs.
- Select the length to be removed from the pull down list.
- Click the  to remove the selected length from the list.
- Click the  to confirm the selection.



- Hover over a length in the Avail or Proposal workspace to engage the  icon.
- Click this icon to quickly remove the selected length from an individual line in the workspace.

Spot Lengths Filter

Lengths displayed in the body of the Proposal are controlled by the Spot Lengths filter above the body of the workspace.








- Spot Lengths selected in the Avail or Proposal header or added to Inventory lines, will be visible in the pull-down menu. One, multiple or all Lengths may be selected to display in the view.

Note: Deselecting Spot Lengths in the filter menu hides lengths from the view. Deleting lengths from an inventory line removes them from the line.

Units

Units can be edited in the same way as they are entered.

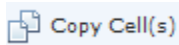
- Double-click into a cell and enter the number of units for a particular week.
- Units can be copied to all subsequent weeks by clicking the **Copy to Weeks** arrow.

<div>  Edit  Copy Cell(s)  Paste  Undo  Clear  Mass Edit </div>						
Inventory	Length	Summary (Weekly Rates)			02/01/10	02/08/10
		GRP	Units	Total \$	Rate	Rate
TV-DY - Ellen	:30	6.4	10	\$10,000...	1250	\$1,250.00
M-F 3:00p - 4:00p						2

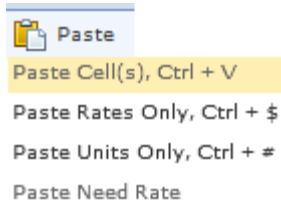
Units can also be entered by clicking in the **Units** column under **Summary**

- Enter a number of units to be allocated across all weeks in a flight.
- Any number entered in the Units column will override units manually entered for each week.

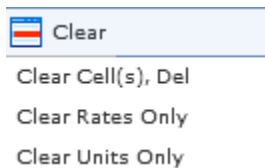
Edit Tool Bar Options



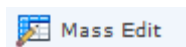
- Highlight a cell you would like to copy and click **Copy Cell(s)**.



- Highlight where you would like to Paste the data.
- Clicking **Paste** then offers multiple options.
- Click the action you would like to execute from this drop down.
Note: Each option displays the appropriate keyboard strokes necessary to complete the edit.



- Highlight the cell you would like to clear.
- Clicking **Clear** offers three options.
- Click the option you would like to execute from this drop down.



- Clicking **Mass Edit** opens the Mass edit window.

Mass Edit

Adjust

☒ Rates

Percent (%)

 Increment +/-

 New Rate

☐ Units

Percent (%)

 Increment +/-

 New Unit

Length

- Mass Edit offers the ability to populate both Rates and Units.
- Changes may be applied by percent, +/- Increment or New Rate.
- Choose a spot length to apply changes to via the Lengths pull down menu.

Changing Rate Cards and Rates

Rate Cards are selected in the Header of the Avail or Proposal. Once the Avail or Proposal tab is selected, all Rate Card and Rate changes must be done from the Workspace. Below you will find the various ways in which both can be manipulated as the Avail or Proposal is edited.

Rate Card Tool Bar

- Select one or multiple lines to edit using the checkboxes to the left of the lines.

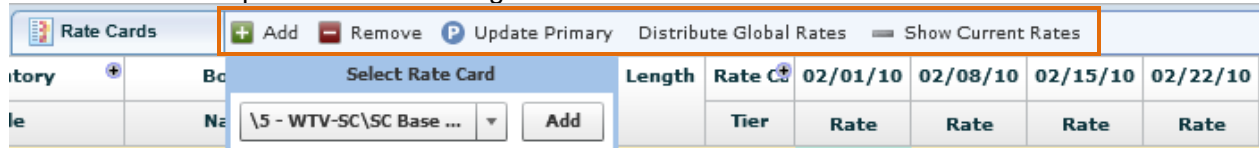


Figure 1

- To **Add** a Rate Card, select from the pull down menu listing available Rate Cards and click **Add**.
- Remove** Rate Cards from selected lines by selecting from the list provided.
- Update Primary** allows you to choose a Rate card and designate it as the Primary for selected lines.
 - The **Primary** Rate Card displays in bold and is positioned above other Rate Cards in the body of the Avail or Proposal.
- 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: this line will appear in the Workspace only and will not print on exported versions.

Editing individual Rate Cards in the Workspace

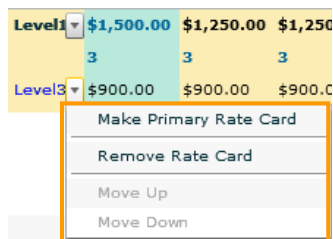


Figure 2

- Hovering over any Rate Card in the workspace engages drop down arrows providing additional options for that Rate Card dependent upon its order in the Rate Card **Tier**. When three or more Rate Cards are present in a line the **Move Up** and **Move Down** become available options (Figure 2).

Editing Rates

	02/08/10	02/15/10	02/22/10
	Rate	Rate	Rate
	\$1,250.00	1350	\$1,350.00
3	3	3	3

Figure 3

- Edit Rates by double-clicking in any cell and entering a rate.
- When either the Rate or Unit field is selected to be edited, both fields will open and are then available to be edited (Figure 3).

Note: Only the Primary Rate card can be edited.

- After an adjustment is made, the **Copy to Weeks** arrows next to the edited fields provide a quick way to copy changes across subsequent weeks for the remainder of the Avail or Proposal.
- Edited rates display in blue. Changes will not be displayed in the exported version of the Avail or Proposal.
- In Monthly or Quarterly rate view 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.

Flight View menu – Rate Options



Rate View

- Select to view Weekly, Monthly or Flight Rates

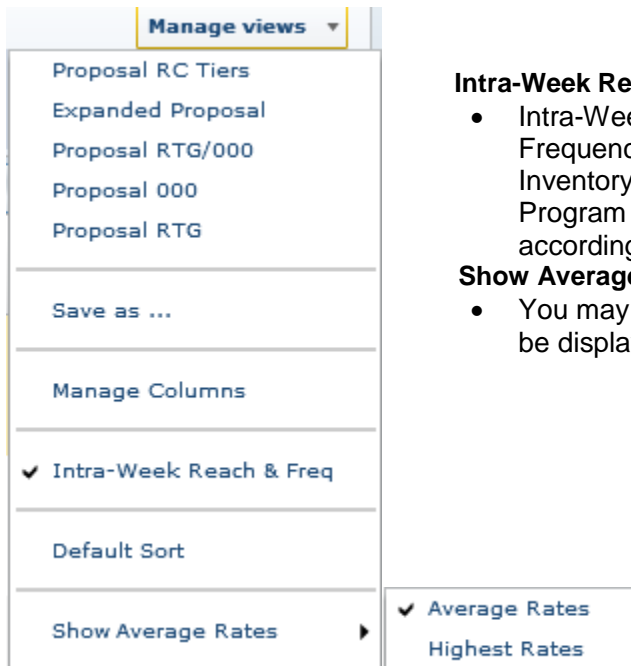
Global Rate (legacy)

- Select to view **Global Rates** instead of Weekly, Monthly or Flight

Show All Rates (legacy)

- Selecting this check box will display a Global rates column in addition to the Weekly, Monthly or Flight rates within the Avail or Proposal workspace.

Manage Views - Rate Options



Intra-Week Reach & Frequency

- Intra-Week Reach & Frequency adjusts the displayed Reach and Frequency values based on the specific weekdays of the Program Inventory line. For example, if a user adjusts weekdays on a Program line to air only W-F, the reach/frequency will adjust accordingly instead of using the entire program week.

Show Average/Highest Rates

- You may choose to toggle between Average and Highest Rates to be displayed.

Adding, Removing and Sorting Ratings Books

There are a number of ways to edit Books within the WO Sales Avail and Proposal system. Below is a collection of tips to guide you through available functionality.

Programs		Rate Cards		Rating Books		+ Add - Remove P Sort Add Competitive Stations				
<input type="checkbox"/>	<input type="checkbox"/>	Inventory	Books	A25-54 (Primary)			Length	Rate C	02/01/10	02/08/10
		Title	Name	RTG	SHR	CPP		Tier	Rate	Rate
	<input type="checkbox"/>	TV-DY - Ellen	Dec 2009 PA L7 GE	0.8	4.8	\$1,703.13	:30	Level1	\$1,500.00	\$1,250.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	M-F 3:00p - 4:00p	Jan 2010 PA L7 GE	1.0	5.4	\$1,362.50		3	3	
	<input type="checkbox"/>	TV-DY - The Martha ...	Manual					Level1	\$1,350.00	\$1,350.00
<input type="checkbox"/>	<input type="checkbox"/>	M-F 12:00p - 1:00p						1	1	
								Level3	\$970.00	\$970.00

Add New Book

Edit Book For Item

Make Primary Book

Remove Book From Item

Move Up

Move Down

Drop Down Options

The drop down options next to each book provides you with a variety of different editing and sorting options. These include:

- Add additional books
- Edit the selected book
- Make the selected book the Primary book
- Remove the book from the selected inventory line
- Sort the books for the selected line in a user defined order



Rating Books Tool Bar Options

- Clicking Add opens the Select Books window. From there add books from the Books, Projection and Overnights tabs.

Rating Books		Add Remove	
Books		Select Books to Remove	
Name	RTG		
Dec 2009 PA L7 GEN	0.8	<input type="checkbox"/>	Dec 2009 PA L7 GEN
Jan 2010 PA L7 GEN	1.0	<input type="checkbox"/>	Jan 2010 PA L7 GEN
		Remove	

- Clicking **Remove** from the tool bar opens a pull down menu.
- Select the appropriate Book and click **Remove**.

Add Remove Sort	
Books	
Name	RTG
PA L7	5.8
T L7	6.1
<div> Jan 2008 PA L7 Jan 2009 T L7 </div>	
<input checked="" type="checkbox"/> <input type="checkbox"/>	

- Clicking Sort from the tool bar opens a pull down menu.
- Hovering over a Book initiates the sort options
- Selecting  will move the selected book to the Primary position.
- Click  to Remove the book from selected programs.

Rating Books Tool Bar Options (continued)

Note: Users have the ability to click into and edit the Rtg, Shr, H/P, and Global Rate fields. Adjustments made to the Demo fields will be displayed in blue.

- **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.

Editing Ratings

Ratings information can be easily adjusted on an Avail or Proposal. Below you will find some of the ways that Ratings can be managed.

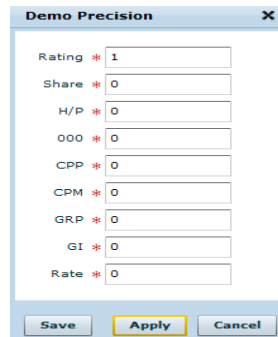
Editing Ratings information

- Ratings may be edited from an Avail or Proposal by clicking into the ratings field and entering the rating you wish to use. This type of edit may be done in the **RTG**, **SHR** and **H/P** fields for any selected demos. Changes made in one field will update other ratings related information on the same line.

Header										Add Inventory		Avail		Proposal		Summary		Versions	
Filters Select Stations, Select Markets, EM,EN,PR, All Spots, 12/29/08-01/25/09														Filtered : 2 items					
Programs			Rate Cards			Rating Books			+ Add		- Remove		P Sort						
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inventory		Length	Books	A25-54 (Primary)			Global									
Title		Name		RTG			SHR	H/P	Rate										
EN - NBC Nightly News			:30	Jan 2008 PA L7	5.8	21	28	\$2,500.00											
M-F 5:28p - 6:00p				Jan 2009 T L7	6.1	19	32	\$2,125.00											
								\$1,625.00											

Set Precision

Using the  **Set precision** option from the **Manage Views** menu opens the Demo Precision window. Here you determine decimal precision on the workspace.



The screenshot shows a window titled "Demo Precision" with a close button (X) in the top right corner. Inside the window, there are ten input fields, each preceded by a label and a red asterisk (*). The labels and their corresponding values are: Rating (* 1), Share (* 0), H/P (* 0), OOO (* 0), CPP (* 0), CPM (* 0), GRP (* 0), GI (* 0), and Rate (* 0). At the bottom of the window, there are three buttons: "Save", "Apply" (which is highlighted with a yellow border), and "Cancel".