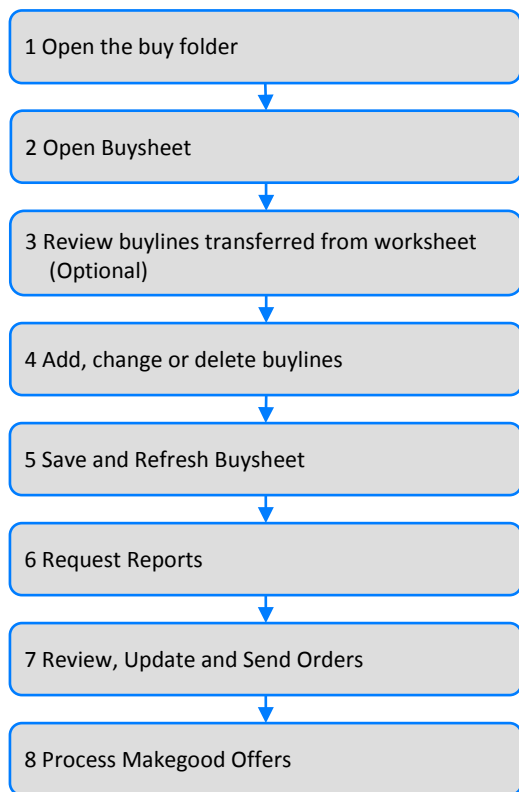# Spot Buy Toolkit – Maintain Buys and Orders

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1. Add a Buyline

1. Click the **Buy Management** link on the slidebar.

2. On the toolbar, click 🞤 . The Add Buyline dialog appears.

3. On the Add Buyline dialog, enter or select the following buyline details.

    - **Station**
    - **Buy period**
    - **Days**
    - **Number/week**
    - **Times**
    - **Daypart**
    - **Spot length**
    - **Program**
    - **Rate**

4. (Optional) Enter the following buyline details, as necessary.
    - **Buyline comments**
    - **Book/projection**
    - **Demo overrides**

5. Click **OK**.

2. Change a Buyline

Buyline Details

1. Select the buylines you want to change and click ✏ , or right-click the highlighted buyline(s) and select **Buyline Details**.

2. Type or select changes in the appropriate field(s).

3. Click **OK**.

Schedule Panel

You can also change a buyline by typing data directly in the Schedule panel.

1. Click in a column on the buyline you wish to change.
2. Type the change directly in the selected cell.
3. Click 💾 .

If the column you wish to change does not appear in the Schedule panel, click 🔧 , add the desired column to the Schedule panel, and change the buyline as described above.

3. Work with Demographics

The Spot Buy Toolkit **Demos** pane displays projected demographic information for the avail line selected in the Schedule pane. Demographic values are calculated using the book or projection specified on the avail line. For comScore, the system does not automatically retrieve demographic values. To retrieve comScore demos, select the line(s) and click the **Retrieve Demos** button on the Worksheet toolbar to look up comScore demographic values for any demo category that has a [Lookup] value.

4. Revise Spots

1. Click directly in a Spots column on the Buysheet.
2. Type the new number of spots per week in the selected cell and press Enter.

❋ *When changing the number of spots on a buyline, you can use schedule shortcuts such as* `n+, nA, nT, or nf,` *where n=number of weeks.*

3. Click 💾 to save your work.

❋ *You can also change the number of spots per week across all weeks in the buyline by clicking* ✏️ *and changing the value in* **Number/week**.

5. Delete a Buyline

Delete a Single Byline

1. Select the buyline you wish to delete.
2. Click ❌ , or right-click the highlighted buyline and select **Delete Buyline**. A confirmation dialog appears.
3. On the confirmation dialog, click **Yes**.
4. Click 💾 .

Delete Multiple Buylines

1. Select multiple buylines using one of the following methods.
   - Use CTRL+click or Shift+click to select multiple buylines.
   - Click in the gray area to the left of the first buyline you wish to select and drag the cursor to highlight additional buylines.
2. Click ❌ , or right-click the highlighted buylines and select **Delete Buyline**. A confirmation dialog appears.
3. On the confirmation dialog, click **Yes**.
4. Click 💾 .

6. Refresh the Buysheet

Refreshing the Buysheet updates the buy folder with the most current information from Spot Toolkit. This is useful when multiple users are working on the same buy details at the same time. In addition, when the Buysheet is refreshed, any changes to the estimate header are also updated.

1. Click 🗂️ to refresh the Buysheet.
2. Click 💾 to save your work.

7. Buysheet Reporting

The following reports are available on the Report menu in the Buysheet.

Report	Tools	Service	Window	Help
Goals Flowchart				Ctrl+1
Goals vs. Purchased Daypart				Ctrl+2
Goals vs. Purchased Weekly				Ctrl+3
Station Schedule				Ctrl+4
Station Share				Ctrl+5
Purchased Demo				Ctrl+6
Makegood Analysis				Ctrl+7
Payment Details				Ctrl+8
Daypart Mix				Ctrl+9

Station Schedule

On the Report menu, click **Station Schedule**. The Station Schedule report appears and a link is added to the slidebar.

Station	Period	Days	Time	Dpt	Dpt Name	Len	Program Name	Total Cost	Dec 27	Jan 3	10
WABC	Dec29-Mar23	W	9-930p	P	PRI	30	MODRN FMLY-A(3)	$28,600.00	1	1	
WABC	Dec29-Mar23	W	930-10p	P	PRI	30	COUGAR TWN-A(3)	$33,800.00	1	1	
WABC	Dec30-Mar24	Th	9-10p	P	PRI	30	GREYS-THU9-ABC	$32,500.00	1	1	
WABC	Dec31-Mar25	F	9-10p	P	PRI	30	PRIMTME-DO-A(3)	$28,600.00	1	1	
WABC								$123,500.00	4	4	

This report shows you the number of spots per week, the total cost for each program, and the total station cost.

Daypart Mix

On the Report menu, click **Daypart Mix**. The Daypart Mix report appears and a link is added to the slidebar.

This report is available only in the Buysheet and compares total dollars to total purchased dollars, by daypart.

Station Share

On the Report menu, click **Station Share**. The Station Share report appears and a link is added to the slidebar.

This report summarizes station totals, including the shares, gross ratings points, and spots each station received in relation to the total buy. Click ✚ to expand each total.

8. Review and Update an Order

1. To open the Orders section of the buy folder, click the **Orders** link on the slidebar. The Orders window appears, with the orders for the Buysheet displayed in the Order List panel.
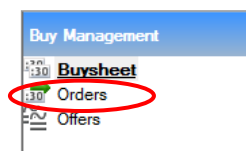
Add Buyer Code

A buyer code MUST be attached to the order before you can send it. If a buyer code has not already been attached to the order, follow the steps below:

1. In the Order List panel, locate the order to which you want to assign a buyer.

2. Click in the **Buyer Code** column on the selected order.

3. Select a buyer code. If you do not see the correct buyer code at the bottom of the dialog, enter search criteria in **Buyer Name** or **Code** and click **Refresh List**.

4. Click **OK**.

Change Routing Information

Routing is determined by the seller. The Seller Name column in the Order List panel contains a multi-column drop-down list with all available sellers, as well as the associated destination, send method, and routing information.

1. In the Seller Name column of the order you wish to change, click ⌄ and select an appropriate seller from the list.

✱ *The names that appear in the Seller Name drop-down reflect what is set up in your Personal Directory. You can also select generic sellers based on send method, such as [OE Recipient]. If you select a generic seller, you must manually enter information in the Seller Name column before you send the order.*

2. When you select a seller name, the **Destination**, **Send Method** and **Route** columns are populated based on the seller you selected. These details are linked to the Seller Name column and cannot be changed manually.

3. (Required) For fax and Order Express orders, the **Fax Number/Email Address** column must be populated. If this field does not auto-populate based on the seller name you selected, manually enter the necessary information.

4. (Optional) For Order Express orders, you can send the order to up to 20 additional contacts. If necessary, in the **Additional Email Addresses** column, enter additional email addresses, separated by commas.

5. Click 💾 to save your work.

Add Comments

1. Click an order line to select it.

2. Click the 💬 on the toolbar or right-click the highlighted order line and select **Order Comments**.

3. Select or type comments as appropriate.

4. Click OK.

5. Click 💾 to save your work.

Order Details

The Order Details dialog allows you to change routing information, add comments, select order demos, and attach a buyer code (as needed).

1. Select an order line and click on the toolbar. The Order Details dialog appears.

2. Adjust order details as appropriate.

3. Click **OK** to close this dialog.

Order Preview

1. Click an order line to select it.

2. Click on the toolbar or right-click the highlighted order line and select **Order Preview**.

3. The preview of the order appears as a separate link on the slidebar. Review the order as necessary.

4. Click the **Orders** link on the slidebar to return to the Orders window.

Send an Order

1. Click an order line to select it.

2. Click to send the order.

3. If you are sending an Order Express order, the Mail Server Logon dialog may appear, prompting you to log on to your email server. Enter your username and password, then click **OK**.

✴ *You may also be prompted to enter a sender email address. Enter an email address to which replies to this order should be sent and click **OK**.*

✴ *The status changes from `Unsent` to `Sent` and the text color changes from **green** to **red**.*

Send Multiple Orders

1. To send multiple orders, highlight all the orders you wish to send, using either the Shift + click method or by dragging your cursor along the gray area to the left of the order line.

2. Right-click anywhere on the highlighted orders and select **Actions** > **Send**.

Order Status

Once the order has been sent, you can check on the status. The status icon always appears in the Order List panel. If you are unsure what the icon means, you can use the tooltip or add the

1. Click **Add**.

2. (Optional) On the Selected Columns list, click and drag the Status Name column to the place you want it to appear in the Order List panel.

3. Click **OK**. The Status Name column appears in the Order List panel.

Order Status Definitions

The following table describes the order statuses that may appear in the **Order List** panel.

| Status	Explanation	Colors
Sent	The buyer sent the order to the rep.	Red
Opened	The rep opened the order.	Red
Confirmed	The rep cleared the order with the station. No action is needed.	Black
Rejected	The rep could not clear the order with the station. Buyer changes are required.	Green
Recalled	The buyer needs to make changes to an order that was sent, but not confirmed.	Green
Revised	The buyer changed a confirmed order.	Black
Fax Delivered	A faxed order was delivered to the rep.	Orange
Buyer Confirmed	A buyer manually confirmed a faxed order.	Black
Partial Confirmed	The order is confirmed, but makegood will follow. This acts like a confirmed order.	Green

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9. Manage EDI Orders

Recall an EDI Order

You can recall a TV order sent via EDI at any time before it is confirmed or rejected. Recalling an order unlocks the associated buylines and allows you to make additional changes, as necessary.

1. To filter the Order List panel to display only sent orders, click the **Status** filter and select **Sent orders**.
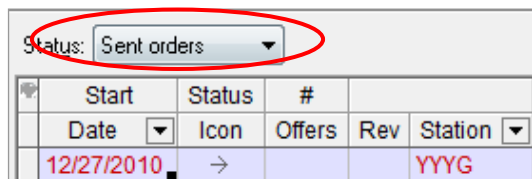
2. Right-click the order line you want to recall and select **Actions > Recall Orders**.
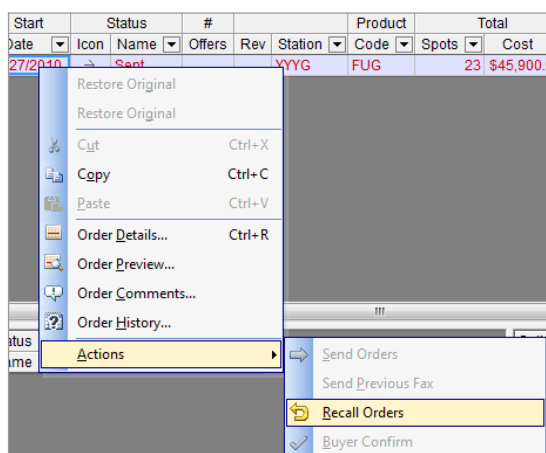
✳ *When the order is recalled, the **Status icon** column is updated to* *and the **Status Name** column displays* `Recalled`.

Change a Confirmed EDI Order

1. To filter the Order List panel to display only confirmed orders, click the **Status** filter and select **Confirmed orders**.

2. Select the order you want to change.

3. Click the **Buysheet** link on the slidebar.

4. Locate the buylines associated with the sent order and make your changes in the Buysheet.

5. Click to save the changes you made to the buy.

6. Click the **Orders** link on the slidebar to return to the Order List panel.

7. Select the order and click to resend the revised order.

✳ *If the station can confirm the bulk of the order, but a small portion of the order cannot be cleared, the station can partially confirm an order and send comments back to the agency, explaining the portion that cannot be booked. In Spot Buy Toolkit, a partially confirmed order is equivalent to a confirmed order, and the buy is unlocked. Usually a makegood for the uncleared portion will follow. To change a partially confirmed order, filter the **Order List** panel to display partially confirmed orders, then perform steps 2-7 above.*

Change and Resend Rejected EDI Orders

1. To filter the Order List panel to display only rejected orders, click the **Status** filter and select **Rejected orders**.

2. Select the rejected order you want to change.

3. Review the associated seller comments in the Comments panel in the lower right-portion of the window.

4. Click the **Buysheet** link on the slidebar.

5. Locate the buylines associated with the sent order and make your changes in the Buysheet, based on the seller comments.

6. Click to save the changes you made to the buy.

7. Click the **Orders** link on the slidebar to return to the Orders List.

8. Select the order and click to resend the revised order.

Cancel an EDI Order

If the entire buy needs to be cancelled, you can remove the spots using any method you choose. This includes pre-empting or deleting spots, or deleting entire lines. This type of revision is recognized by the seller systems as an order cancellation. Mediaocean recommends that you notify the seller by phone to determine the cancellation policy of the seller and station. Including informative comments on the revision also expedites the seller's processing of the revision. You can also cancel a portion of the buy by removing the spots. The seller's system will recognize that there are missing spots. To cancel an order, complete the following steps.

1. Remove spots using the chosen method.

2. Right-click the order line and select **Order Comments**. The Order Comments dialog opens.
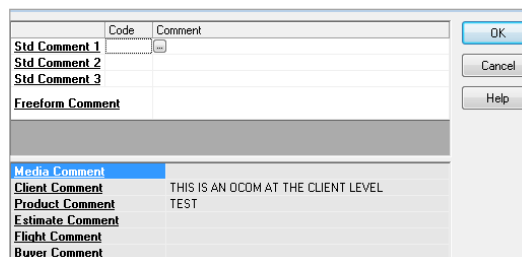
3. On the Order Comments dialog, select **Freeform Comment.**

4. Enter comments explaining the cancellation.

5. Click **OK**.

6. Select the order and click [→] to resend the cancelled order.

7. Notify the seller of the cancellation.

✳ *The **Cancel** action is intended for true cancellations, rather than changes or recalls. An order that has been cancelled and confirmed by the seller appears in* `Cancel Confirmed` *status and can no longer be sent via EDI. Any future revisions need to be sent via fax or Order Express (OE). Order Express is only available if the setting is enabled for your agency.*

10. Manage Order Express (OE) Orders

Change an OE Order

Order Express orders can be changed and resent at any time. You do not have to recall an OE order to resend it. Once the order is resent, the link in any previous emails sent to the seller is deactivated. Only the most recently sent order link remains active.

1. In the Order List panel, locate the order that requires changes.

2. Click the **Buysheet** link on the slidebar.

3. Locate the buylines associated with the order and make the necessary revisions on the Buysheet.

4. Click [💾] to save the changes you made to the buy.

5. Click the **Orders** link on the slidebar to return to the Order List panel.

6. Select the order and click [→] to resend the revised order.

✳ *Status Update*

The **Status** column is updated to `REVISION SENT` and a revision number appears in the **Rev** column, as shown in the following screen.

Cancel an OE Order

You can cancel an OE order in the Order List panel. It is not necessary to cancel orders to send revisions.
Right-click the order line and select **Actions > Cancel Orders**.
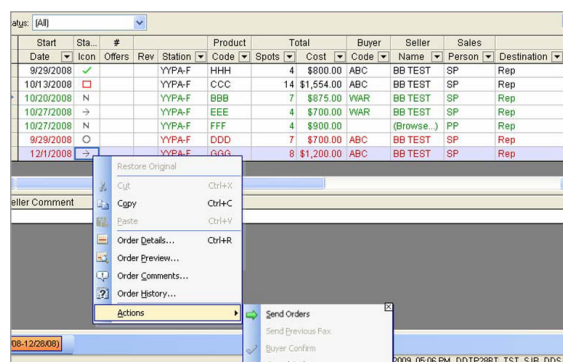
✳ *When the order is cancelled, the **Status icon** column is updated to [□] and the **Status Name** column displays* `CANCEL SENT`.

11. Add a Contact to the Personal Directory

For greater control over order routing, you can set up information about order recipients in a personal address book, referred to as the Personal Directory.

1. On the **Tools** menu, click **Personal Directory**. The Personal Directory dialog appears, and is divided into two tabs based on media (Television and Radio).
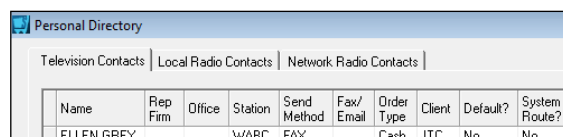
2. Click **Add** to add a contact to the Personal Directory. The Add Contact wizard appears.

3. On the first page of the wizard, specify the following details.

   • **Media**

   • **Station**

   • **Client**

4. Select an order type option.

5. Click **Next**.

6. On the second page of the Add Contact wizard, specify the following details.

   • **Destination**

   • **Send method**

   • **Contact name**

      1. (Optional) If necessary, select the **Set as default contact for station** check box.

8. Click **Finish**. You are returned to the Personal Directory and the contact you added appears on the list.

9. Click **OK**.

12. Radio Orders

Radio EDI (REDI) Prerequisites

Before sending radio orders via EDI, the following setup must be completed.

1. The **Fax all radio orders** field on your agency's OM profile record in SFM must be set to `N`. Once this is set, `EDI` appears as the default send method for all stations and reps who accept EDI orders. Contact your account team for more details.

2. Buyer codes must be set up prior to using REDI.

Set up Radio Orders

1. In the Order List panel, in the Buyer Code column, select **Browse** from the drop-down list. The Browse for a Buyer Media R dialog appears.

2. Select a buyer code.

3. Click **OK**.

4. In the Seller Name column, complete one of the following.
   - If you want to fax this order, select a fax recipient option from the drop-down list.
   - If you want to send this order via REDI, select **Browse** from the drop-down list. The Browse for a Seller dialog appears.

✳ *The only EDI option for a radio order is the **Browse** option. You cannot manually enter seller names for EDI recipients in the **Order List** panel.*

5. Select a seller name on this dialog.

6. Click **OK**.

Send Radio Orders

✳ *The **Destination, Send Method** and **Route** fields are updated based on the seller name you selected.*

1. (Optional) If you want to fax the order, in the **Fax Number/Email Address** field, and enter the fax number to which you want the order sent.

2. Click 💾 to save your work.

Send Order Revisions

After an order is sent, changes to the buy can be made without recalling the order.

1. Locate the sent order that requires revisions.

2. Click the **Buysheet** link on the slidebar.

3. Locate the buylines associated with the sent order and make your revisions directly in the Buysheet.

4. Click 💾 to save your work.

5. Click the **Orders** link on the slidebar.

6. Right-click the order associated with the revised buylines and select **Actions** > **Send Orders**.