

Market Monitor

Client User Guide

V1.02



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About This Document

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Disclaimer

Compiled with due care by WMC Global, this guide is subject to change without notice. WMC Global has endeavored to ensure that the material herein is correct and current at publication but takes no responsibility for errors, omissions, or defects.

The statements and recommendations in this guide are believed to be accurate and reliable but are presented without express or implied warranty.

Version History

Version	Date	Details
1.0	July 2015	Version 1.0 is the first release of the user guide following the Market Monitor launch.
1.01	July 15, 2015	Version 1.01 includes revised screenshots and minor text edits based on interface updates. In addition, users can now download individual audit notices as PDFs, as described in the new subsection Downloading an Audit Notice.
1.02	September 10, 2015	Version 1.02 includes many updates, including clickable URLs, new enforcement statuses, information regarding attaching files to audit notices, a new keyword field available on audit notices, and new automated email management options. In addition, a new section appears addressing Partner Services.

Introduction

We, at WMC Global, developed Market Monitor to help you better manage compliance of your programs and associated ads and service messages. Here, you can access audit notices, view notifications, and communicate with the WMC Global Support Team.

Overview

Replacing PSMS Industry Monitor, Market Monitor offers many of the same features in a dynamic, easy-to-use interface with improved functionality. Market Monitor contains a dashboard displaying a list of audit notices associated with your company. On this page, you've many options to search through your audit notices.

In addition, the Reports tab, one of the most exciting Market Monitor features, displays beautiful, interactive reports with many different charts and options to view your audit results. On the Notification tab, you see Market Monitor broadcast messages.

Purpose

We've developed this user guide to help you use Market Monitor. For more information about the audit and enforcement processes, contact the WMC Global Support Team via email at <u>us.support@wmcglobal.com</u> or by phone at +1 855 272 8182, Monday through Friday, from 9:00 A.M. and 5:00 P.M. EST.

Section 1 explains Market Monitor account details; Section 2 describes the dashboard; Section 3 gives details about how to view and work with reports; Section 4 describes notifications; Section 5 explains automated email messages; and Section 6, which is new, explains Partner Services; and Section 7 supplies contact details for the WMC Global Support Team.

Account Details

In this section, we explain how to access your Market Monitor account.

Attaining an Account

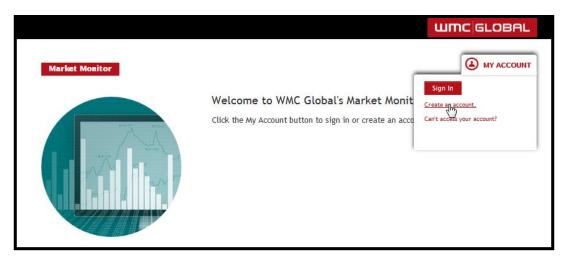
If you had an account in PSMS Industry Monitor, we've set up an account for you in Market Monitor already. You should've received an email message from noreply@wmcglobal.com with instructions to update your password.¹

Creating a New Account

If you're a new user, you must create a new account. Complete the following steps.

- 1. Open a browser window.
- 2. Enter <u>www.usportal.wmcglobal.com/ims</u> in the address bar or the search field.
- 3. Click MY ACCOUNT, in the top right corner of the homepage, which loads the dropdown menu containing several options.
- 4. Click the **Create an account.** link, as shown in Exhibit 1.

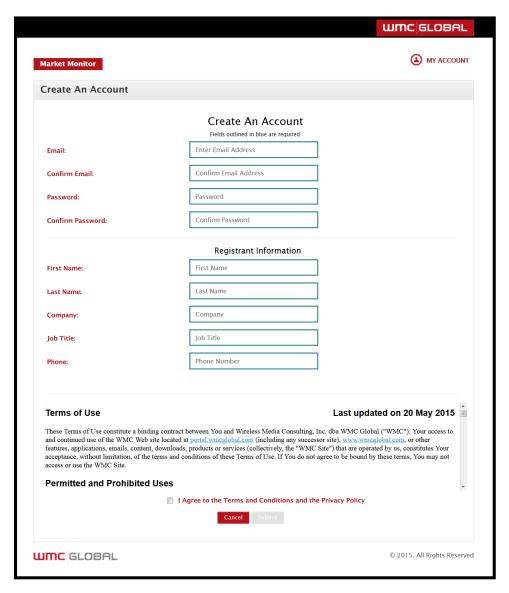
Exhibit 1: MY ACCOUNT Options



¹ If you've yet to receive an email message with your Market Monitor account details, contact the WMC Global Support Team via email at us.support@wmcglobal.com or by phone at +1 855 272 8182, Monday through Friday, from 9:00 A.M. and 5:00 P.M. EST.

5. Enter your details² on the Create an Account page, as shown in Exhibit 2.

Exhibit 2: Create an Account Page



- 6. Check the "I Agree to the Terms and Conditions and the Privacy Policy" box at the bottom of the page, after you've read them.
- 7. Click the Submit button.

² You must complete fields outlined in blue.

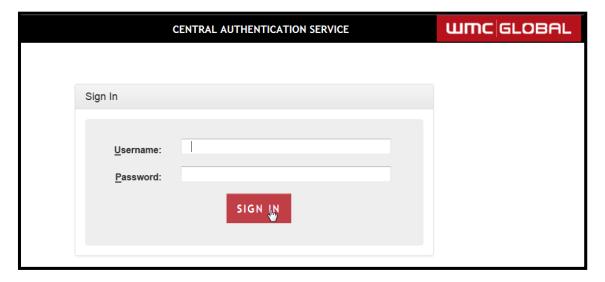
After you've submitted your registrant information, you receive an email message. Click the link in the email message to confirm your email address. You also receive an email message when your account is activated.

Signing In

To sign into Market Monitor after you've received your account details, complete the following steps.

- 1. Open a browser window.
- 2. Enter www.usportal.wmcglobal.com/ims in the address bar or the search field.
- 3. Click MY ACCOUNT in the top right corner of the homepage.
- 4. Click the **Sign In** button (see Exhibit 1) on the dropdown menu, which sends you to the Sign-In page displayed in Exhibit 3.

Exhibit 3: Sign-In Page



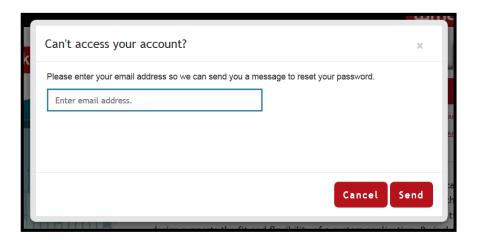
- 5. Enter your username (i.e., your email address) and password.
- 6. Click the **Sign In** button.

Updating Your Password

Should you forget your password or decide to change it, you must update your password by performing the following steps.

- 1. Click MY ACCOUNT.
- 2. Select the Can't access your account? link.
- 3. Enter your email address in the "Can't access your account?" window, as shown in Exhibit 4.

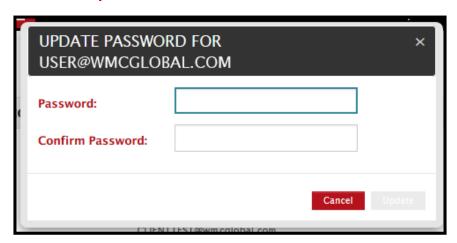
Exhibit 4: Can't Access Your Account Window



4. Click the **Send** button.

You receive an automated email message with a link to reset your password. Click the link, and you're redirected to the Update Your Password window, as shown in Exhibit 5.

Exhibit 5: Update Your Password Window



To update your password, perform the following steps.

- 1. Enter your new password³ in the Password field.
- 2. Re-enter your new password in the Confirm Password field.
- 3. Click the **Update** button.

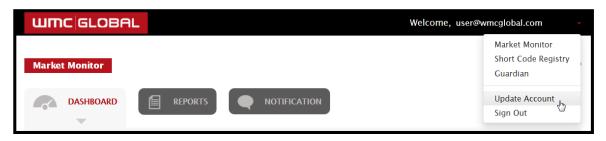
After your password has been updated, you see an onscreen message indicating that you've reset it successfully. Click MY ACCOUNT, and sign in with your new password.

Updating Your Account

To update your account, complete the following steps.

- 1. Sign into Market Monitor at www.usportal.wmcglobal.com/ims.
- 2. Click the red arrow to the right of your email address, loading the dropdown menu.
- 3. Select Update Account, as shown in Exhibit 6.

Exhibit 6: Update Your Account Option

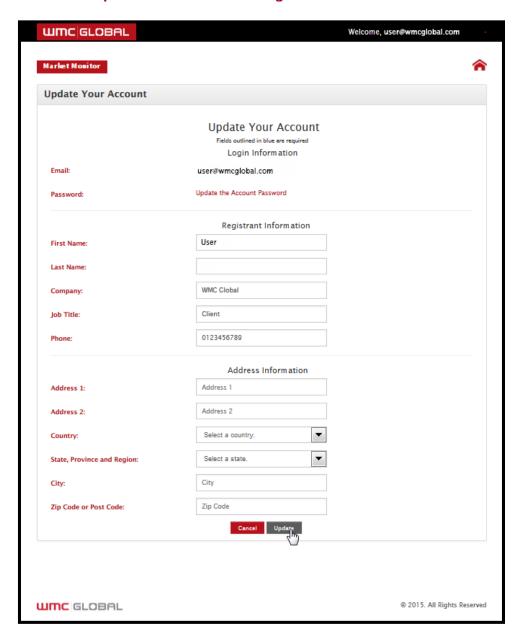


³ Your password must contain one lowercase letter, one uppercase letter, and one non-alphanumeric character (i.e., a number or a symbol).

⁴ Your passwords must match. Otherwise, the **Update** button remains inactive, and you're unable to update your password.

4. Update the fields⁵ as necessary on the Update Your Account page, as shown in Exhibit 7.

Exhibit 7: Update Your Account Page



5. Click the **Update** button to save your changes.

⁵ Remember, fields outlined in blue are required.

Signing Out

To sign out of your account, take the following steps.

1. Click the red arrow to the right of your email address, loading the dropdown menu, as shown in Exhibit 8.

Exhibit 8: Sign-Out Method

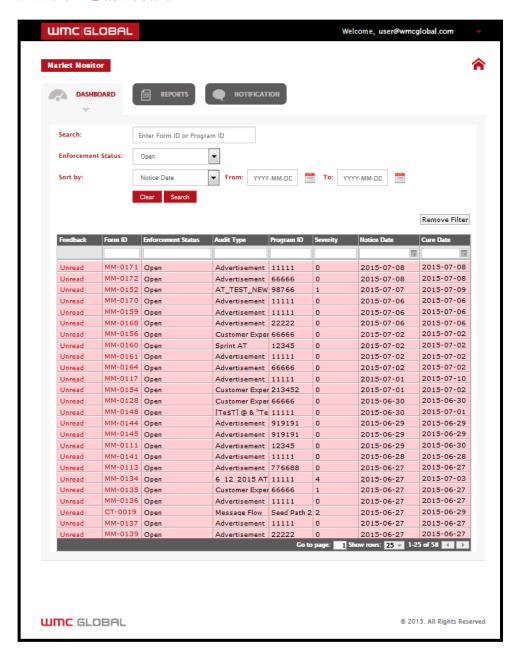


2. Select Sign Out.

Dashboard Tab

When you sign in, the Dashboard loads, displaying a quick overview of your audit results. Exhibit 9 displays the dashboard.

Exhibit 9: Dashboard



Here, you can review the entire list, using the page navigation at the bottom, or you can use the search features to locate specific audit notices or groups of audit notices. In addition, you can customize the number of rows (in increments of 25) that display in

the results table at a given time. A Form ID in red typeface with "Unread" in the Feedback column indicates you've no comments on the audit notice or you've unread comments on the audit notice. Form IDs are classified as "Unread" until a user enters a comment. More about the results table appears later in this section.

Using Search and Filter Features

On the top half of the Dashboard, shown in Exhibit 9, you've several options to search for audit notices.

Search by Form ID or by Program ID

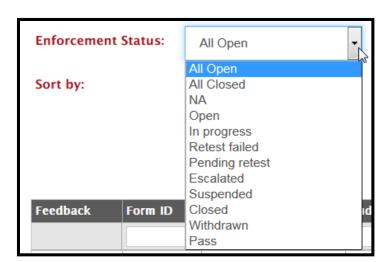
Currently, the Search field is limited to searching the Form ID and the Program ID. To perform a search, complete the following steps.

- 1. Enter a Form ID or a Program ID in the Search field.
- 2. Click the **Search** button.
- 3. Click the **Clear** button to clear your search.

Search by Enforcement Status

You can also search the audit results by choosing an enforcement status from the dropdown menu, as shown in Exhibit 10.

Exhibit 10: Search by Enforcement Status



To return to the results that displayed on sign-in, you must refresh the page. Exhibit 11 defines each enforcement status.

Exhibit 11: Enforcement Status Definitions

Status	Definition
All Open	All open audits, including those that have been escalated, load
All Closed	All closed audits load
NA	Enforcement status is inapplicable to the audit
Open	Audit remains unresolved
In Progress	Correction or corrections to the noncompliant ad, messaging, or both are underway
Retest Failed	Proposed correction or corrections to the noncompliant ad, messaging, or both are insufficient to resolve the audit
Pending Retest	Audit has been identified for retest that has yet to be performed
Escalated	Audit has been escalated for carrier review
Suspended	Carrier has suspended the program or the short code
Closed	Audit has been resolved
Withdrawn	Audit no longer applies or was issued in error
Passed	Audit passed

Search by Notice Date or by Cure Date

In addition, you can sort the audits by Notice Date or by Cure Date⁶ by entering a date range in the relevant fields.

To sort by Notice Date or by Cure Date, complete the following steps.

- 1. Choose the date type from the (Sort by) dropdown menu.
- 2. Enter beginning and ending dates in the From and To fields.
- 3. Click the **Search** button to search for audits with your selected date range, as shown in Exhibit 12.

⁶ The Notice Date is the date on which the audit was issued, and the Cure Date is the date by which the audit must be resolved.

Exhibit 12: Search by Notice Date or by Cure Date



To return to the results that displayed on sign-in, you must refresh the page.

Understanding the Results Table

On the bottom half of the Dashboard, below the search features, a list of your audit notices is displayed in table format, as shown in Exhibit 13.

Exhibit 13: Results Table



Red-shaded rows indicate that no comments appear on the audit notice or that you've yet to review the most recent comment on the audit notice. An audit notice retains its "Unread" status until someone enters a comment. Exhibit 14 describes each column in the results table.

Exhibit 14: Results Table Column Descriptions

Column	Description
Feedback ⁷	Status of comments associated with the audit notice
Form ID	Unique number associated with the audit notice
Enforcement Status ⁸	Current status of the audit
Audit Type	Category of the audit subject (e.g., Standard Rate Advertising, Standard Rate Customer Experience, Standard Rate Message Flow)
Program ID	Program name or short code associated with the audit
Severity	Number assigned to the audit reflecting the gravity of the most serious violation cited on the audit.
Notice Date	Date on which the audit was issued
Cure Date	Date by which the audit must be resolved

Filter the Results Table

In addition to using the search fields, you can filter your results by simply entering your search term in the blank field above each column. After applying one filter, you can apply another. You can sort the results in each column, too.

Remove Filters from the Results Table

To remove the filters you applied to the results table, click the **Remove Filter** button (see Exhibits 9 and 13). The list of audit notices displayed on sign-in appears.

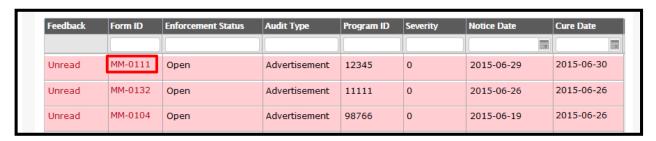
Viewing Audit Notices

Now that you've filtered your results, you might want to view individual audit notices. To do so, click the red linked Form ID of the audit notice you wish to view. Exhibit 15 displays an example link.

⁷ "Unread" is the default status in the Feedback column, indicating either no comments appear or unread comments appear in the highlighted audit notice or audit notices. An audit notice retains its Unread status until someone leaves a comment. The "Read" status indicates that you've read the comments associated with an audit notice.

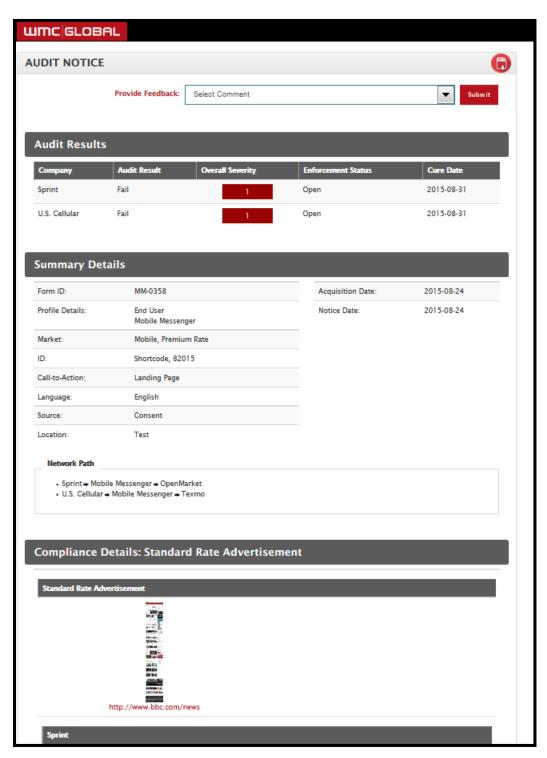
⁸ Exhibit 11 on page 11 defines the individual enforcement statuses.

Exhibit 15: Form ID Link



When you click the Form ID, the audit notice loads in a separate browser tab. Exhibit 16 displays an example of an audit notice.





Here, you can review the audit notice, and you can enter a comment on the audit notice itself. In addition, WMC Global administrators now have the option to add an applicable keyword to a keyword field during the audit process.

When included, the keyword will appear between the Location field and the network path, as shown in Exhibit 17.

Exhibit 17. Audit Notice with Keyword Field



Exhibit 18 describes briefly the general contents of an audit notice.

Exhibit 18: Audit Notice Field Descriptions

Audit Notice Field	Description
Audit Results Section	1
Company	Client or clients associated with the audit
Audit Result	Result of the audit
Overall Severity	Number assigned to the audit reflecting the gravity of the most serious infringement cited on the audit
Enforcement Status	Current status of the audit
Cure Date	Date by which the audit must be resolved
Summary Details Sec	tion
Form ID	Unique number associated with the audit notice
Profile Details	Username and companies associated with the audit
Market	Market where the ad, the service message or messages, or both were intercepted
ID	Short code or mobile program name associated with the audit
Call-to-Action	Location of the call-to-action
Language	Language (e.g., English, Spanish) employed in the ad or in the service message or messages

Audit Notice Field	Description
Source	Medium (e.g., online, print) where the ad or service message was intercepted originally
Location	URL or name of the medium (e.g., magazine) where the ad or service message was acquired
Keyword ⁹	Word or words associated with the program
Network Path	Hierarchy of companies associated with the audit
Acquisition Date	Date on which the ad or service message was intercepted
Notice Date	Date on which the audit was issued
Compliance Details S	Section
Audit Type ¹⁰	Category of the audit subject (e.g., Standard Rate Advertising, Standard Rate Customer Experience, Standard Rate Message Flow)
Audit Standard	Infringement of the rules specific to the carrier
Severity	Number assigned to the infringement reflecting its gravity
Action Required	Step or steps required to bring the ad, the service message or messages, or both into compliance
History Log Section	
Date	Date on which the comment was entered
Username	Name of the user who entered the comment
Notes	Observations, remarks, or queries regarding the audit notice

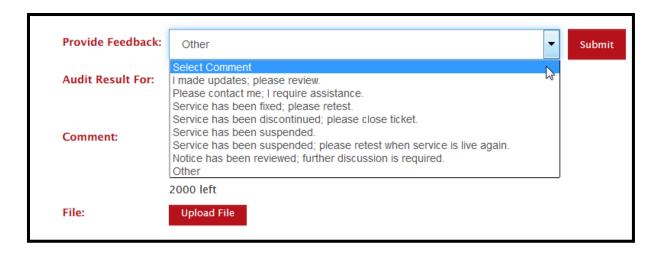
⁹ The keyword field appears on the audit notice only when one or more keywords are associated with the audit notice.

 $^{^{10}}$ The audit type follows the colon in the Compliance Details section header of the audit notice. For example, an audit for a standard rate advertisement would be displayed as "Compliance Details: Standard Rate Advertisement."

Entering a Comment

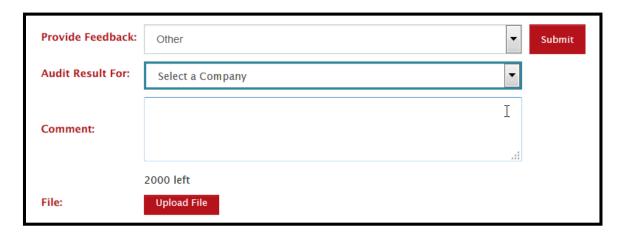
Options to enter a comment appear at both the top and the bottom of each audit notice. You can choose from a list of predefined comments, as shown in Exhibit 19.

Exhibit 19: Predefined Comments List



Alternatively, you can choose "Other" from the predefined comments list, and a comment box appears, as shown in Exhibit 20, where you can enter your own comments (up to 2,000 characters), upload a file, or both.

Exhibit 20: Comment Box Detail

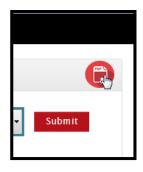


After making a selection from the dropdown menu, a new field (Audit Result For) appears where you can choose for which client¹¹ you'd like to enter comments. If you've comments for multiple companies, you must enter them separately for each company. Note that selecting a company will make comments visible to all companies in the client's network path. Additionally, you can upload a file or files when you choose *any* comment from the list. File types supported include PDF, DOCX, PNG, and JPEG. Currently, video files are unsupported.

Downloading an Audit Notice

You've the option to download an audit notice as a PDF to view, print, or save by clicking the red PDF button in the top right corner of the audit notice, as shown in Exhibit 21.

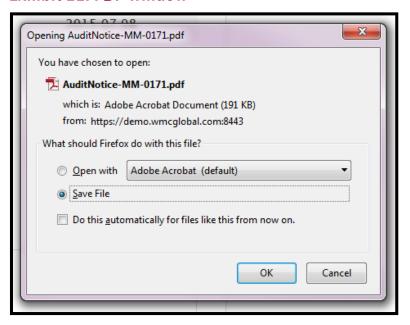




¹¹ Only the company or companies with which you are associated will appear. The list includes the companies sponsoring the audit.

After clicking the button, a PDF window loads, as shown in Exhibit 22.

Exhibit 22: PDF Window

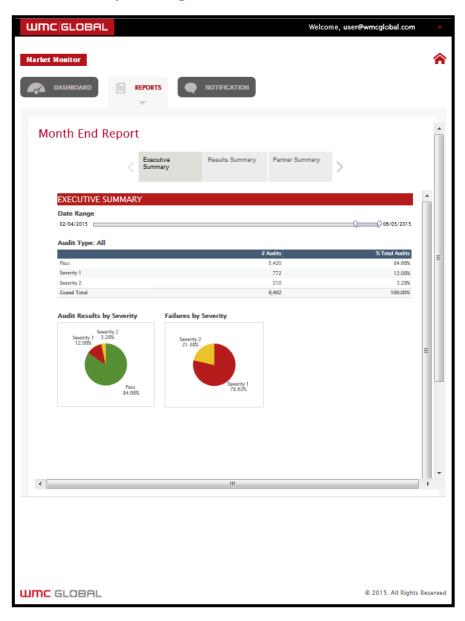


You can open the file to view or print it, or you can save it for your records.

Reports Tab

The Reports tab displays your WMC Global reports. Here, you can generate a quick overview of your audit results data and use the interactive features to delve deeper into each data point. Exhibit 23 displays an example of a report that might appear on the Reports tab.



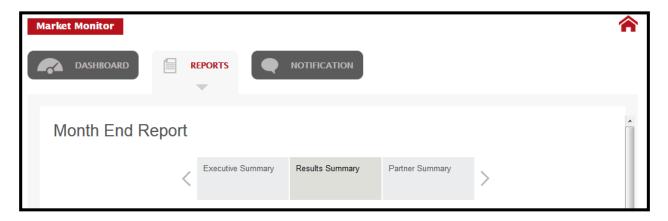


Reports displayed here show only data associated with *your* company. Basic instructions for filtering the reports appear below, but layouts and options might vary based on your data.

Using Report Page Tabs

When your report contains more than one page, you see two or more report page tabs at the top of the report that allow you to navigate to the other pages. Exhibit 24 displays example page tabs.¹²

Exhibit 24: Example Report Page Tabs



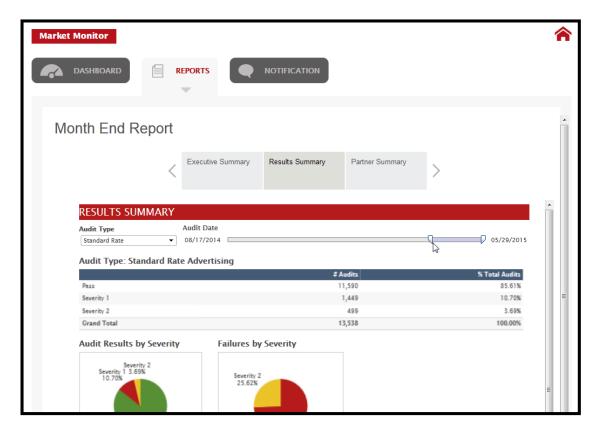
Simply click the gray tab for the page you want to view. The current page is shaded in a darker gray.

Altering Date Ranges

You've several options to change the date range. Most report pages contain one or more Audit Date slider bars, as shown in Exhibit 25.

 $^{^{12}}$ We use the term example because the report page tabs are specific to your reports.





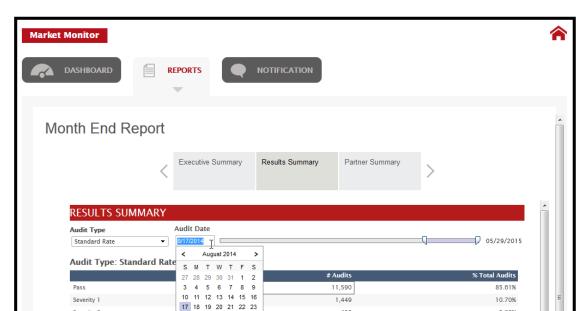
To filter the date range, perform the following steps.

- 1. Select one of the bar handles on the Audit Date slider bar.
- 2. Slide the handle left or right to adjust the date range displayed in the report.

In addition, you can choose beginning and ending dates from the calendar or enter them manually, as shown in Exhibit 26.

3.69%

100.00%



31 1 2 3 4 5

Today: 6/24/2015

Severity 2

Exhibit 26: Date Range Calendar

With either option, the data in the tables and charts linked to those dates update automatically. Should you have no data associated with the chosen date range, the tables and charts display no data.

everity

499

13.538

Modifying Data Results

Severity 2

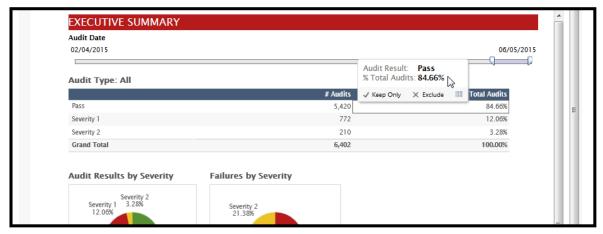
Grand Total

Audit Results by Severity

Severity 2 Severity 1 3.69%

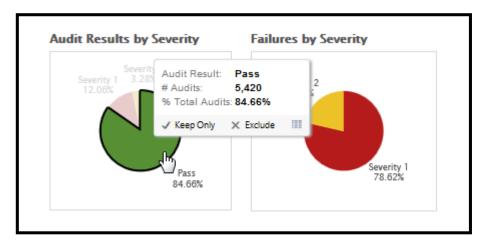
Importantly, you've many options to change how the data are shown. For example, you can mouse over data points to see details, as illustrated in Exhibit 27, and to filter the data to display specific information.

Exhibit 27: Pass Percentage Data Point with Details



You can also click a "pie slice" to see other details about a data point, as shown in Exhibit 28.

Exhibit 28: Pie Chart Data Point with Details



As displayed in Exhibit 29, you can click on an individual chart column, highlighting all data on the page associated with the selected data point.

PARTNER SUMMARY Audit Type **Audit Date** Standard Rate 03/02/2015 05/31/2015 Failures by Top Aggregators 243 # Audits 🖵 % Total Audits Aggregator AG1 243 40.64% 200 AG2 Aggregator: AG1 # Audits: 243 100 √ Keep Only X Exclude III AG4 AG5 AG1 AG3 AG4 AG5 Failures by Top Aggregators over Time 05/06/2013 06/05/2015 100 50

April 2014

August 2014

AG4

December 2014

AG5

April 2015

Exhibit 29: Data Point Highlight

April 2013

Aggregator

AG1

August 2013

AG2

In this case, you can see that all data for AG1 are highlighted.

December 2013

AG3

You can also select a single data point (i.e., Keep Only) or exclude a single data point (i.e., Exclude). Exhibit 30 displays the option to choose a single data point (Severity 2 data point) in the Failures by Severity chart.

Exhibit 30: "Keep Only" Data Point Option

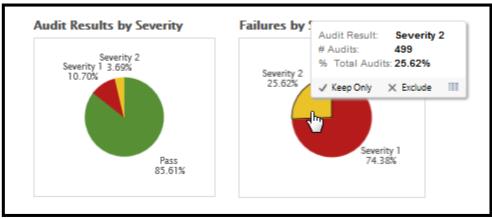
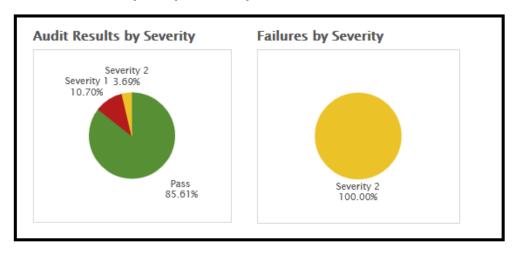


Exhibit 31 displays the results of that choice.

Exhibit 31: "Keep Only" Severity 2 Data Point Results



As you can see, *only* Severity 2 data now appear in the Failures by Severity chart. In addition, when you perform this action, an orange Revert icon appears above the page where you updated the results. If you click it, the data reverts to how it appeared on sign-in. Exhibit 32 highlights the Revert icon.

Exhibit 32: Revert Icon above the Results Summary Tab



Exhibit 33 displays the option to exclude a particular data point from one of the line charts.

Exhibit 33: "Exclude" Data Point Option

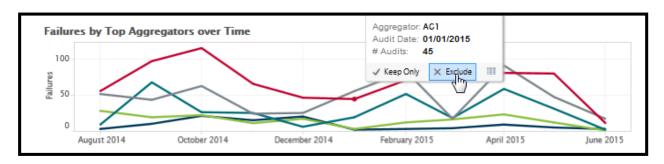
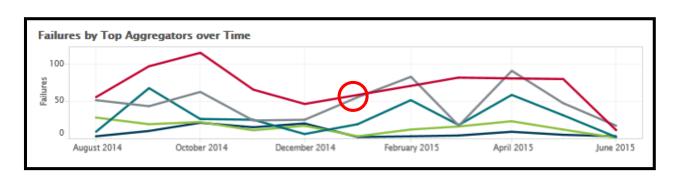


Exhibit 34 displays the same chart without the aggregator's 45 audits.

Exhibit 34: "Exclude" Data Point Results

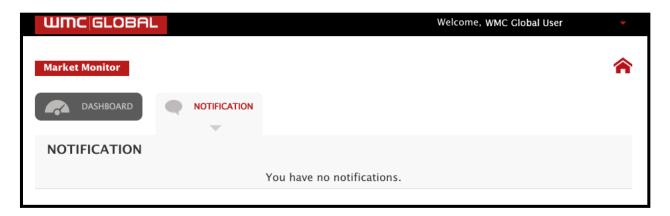


Now, January 2015 audits no longer appear.

4. Notification Tab

The Notification tab displays notifications, or broadcast messages, from the Market Monitor administrator. As shown in Exhibit 35, "You have no notifications." appears when no notifications are present.

Exhibit 35: Notification Tab



5. Automated Email Messages

To ensure you always have access to the most up-to-date information, Market Monitor can send email messages for actions associated with your account, including 1) account activation, 2) audit notification, 3) password update, 4) enforcement status change, and 5) feedback status change. Contact your account manager if you do not wish to receive any emails from Market Monitor.

Should you receive an automated email message, remember to avoid replying to the email. Contact us at <u>us.support@wmcglobal.com</u> instead.

6. Partner Services 💿

Some users also will have access to Partner Services, which houses Partner Validations we've conducted on behalf of CTIA for short code registry lessees. A Partner Validation is a background check meant to ensure that the companies working with you pursue sound business practices and maintain upstanding reputations in the industry. Partner Validations protect the market from high-risk participants that could damage customer experiences and impair market success.

Accessing Partner Services

You can access Partner Services directly from www.usportal.wmcglobal.com/ps or from within Market Monitor.

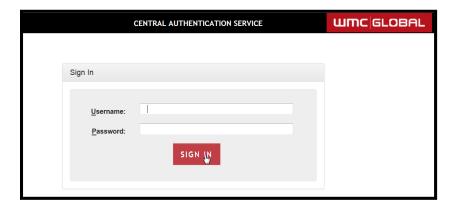
To access Partner Services from its direct link, complete the following steps.

- 1. Open a browser window.
- 2. Enter www.usportal.wmcglobal.com/ps in the address bar or the search field.
- 3. Click MY ACCOUNT in the top right corner of the homepage.
- 4. Click the **Sign In** button on the dropdown menu, shown in Exhibit 36, which sends you to the Sign-In page displayed in Exhibit 37.





Exhibit 37: Sign-In Page



To access Partner Services from Market Monitor, complete the following steps.

- 1. Sign into Market Monitor at www.usportal.wmcglobal.com/ims.
- 2. Click the red arrow to the right of your email address, loading the dropdown menu, as shown in Exhibit 38.

Exhibit 38: Partner Services



3. Select Partner Services.

Viewing the Partner Services Dashboard

After signing in, the Partner Services Dashboard loads, displaying the first Partner Validation in your list. Exhibit 39 is an example of a Partner Validation.

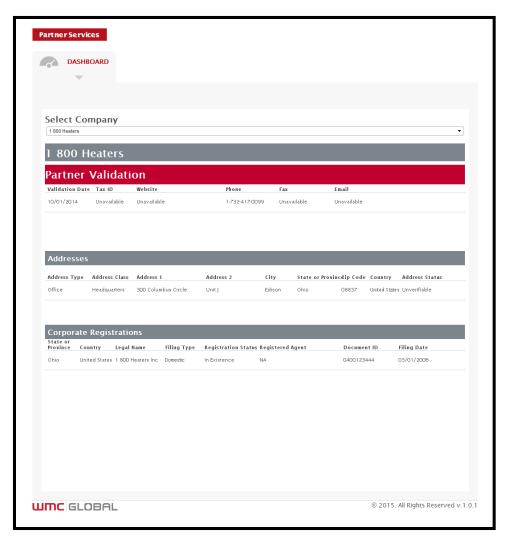


Exhibit 39: Partner Validation Example

Viewing Other Partner Validations

The Partner Services Dashboard defaults to showing the first Partner Validation in your list, sorted alphabetically. To change the Partner Validation displayed in the dashboard, choose another company from the dropdown menu, as shown in Exhibit 40.

Exhibit 40: Partner Validation Company Dropdown Menu



7. Support

The WMC Global Support Team is only a phone call or email message away. Should you have questions or require assistance, contact them via email at us.support@wmcglobal.com or by phone at +1 855 272 8182, Monday through Friday, from 9:00 A.M. and 5:00 P.M. EST.