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About This Document

Copyright

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WMC Global
11781 Lee Jackson Memorial Highway
Suite 500
Fairfax, VA 22033

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

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>July 2015</td>
<td>Version 1.0 is the first release of the user guide following the Market Monitor launch.</td>
</tr>
<tr>
<td>1.01</td>
<td>July 15, 2015</td>
<td>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.</td>
</tr>
<tr>
<td>1.02</td>
<td>September 10, 2015</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 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.

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@wmcgglobal.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 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, 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@wmcgglobal.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 details 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](http://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**

![Sign-In Page](image)

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 password\(^3\) in the Password field.
2. Re-enter your new password\(^4\) 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.

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 fields\(^5\) 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

![Exhibit 8: Sign-Out Method](image)

2. Select Sign Out.
2. 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

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

### Search by Notice Date or by Cure Date

In addition, you can sort the audits by Notice Date or by Cure Date 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

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback⁷</td>
<td>Status of comments associated with the audit notice</td>
</tr>
<tr>
<td>Form ID</td>
<td>Unique number associated with the audit notice</td>
</tr>
<tr>
<td>Enforcement Status⁸</td>
<td>Current status of the audit</td>
</tr>
<tr>
<td>Audit Type</td>
<td>Category of the audit subject (e.g., Standard Rate Advertising, Standard Rate Customer Experience, Standard Rate Message Flow)</td>
</tr>
<tr>
<td>Program ID</td>
<td>Program name or short code associated with the audit</td>
</tr>
<tr>
<td>Severity</td>
<td>Number assigned to the audit reflecting the gravity of the most serious violation cited on the audit.</td>
</tr>
<tr>
<td>Notice Date</td>
<td>Date on which the audit was issued</td>
</tr>
<tr>
<td>Cure Date</td>
<td>Date by which the audit must be resolved</td>
</tr>
</tbody>
</table>

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.
Exhibit 16: Audit Notice Example

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**

<table>
<thead>
<tr>
<th>Call-to-Action</th>
<th>Landing Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Source</td>
<td>Online</td>
</tr>
<tr>
<td>Location</td>
<td><a href="http://google.com">http://google.com</a></td>
</tr>
<tr>
<td>Keyword</td>
<td></td>
</tr>
</tbody>
</table>

Network Path
- NA ➔ Sample Carrier ➔ Sample Company 1 ➔ Sample Company 2

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

**Exhibit 18: Audit Notice Field Descriptions**

<table>
<thead>
<tr>
<th>Audit Notice Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audit Results Section</strong></td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>Client or clients associated with the audit</td>
</tr>
<tr>
<td>Audit Result</td>
<td>Result of the audit</td>
</tr>
<tr>
<td>Overall Severity</td>
<td>Number assigned to the audit reflecting the gravity of the most serious infringement cited on the audit</td>
</tr>
<tr>
<td>Enforcement Status</td>
<td>Current status of the audit</td>
</tr>
<tr>
<td>Cure Date</td>
<td>Date by which the audit must be resolved</td>
</tr>
<tr>
<td><strong>Summary Details Section</strong></td>
<td></td>
</tr>
<tr>
<td>Form ID</td>
<td>Unique number associated with the audit notice</td>
</tr>
<tr>
<td>Profile Details</td>
<td>Username and companies associated with the audit</td>
</tr>
<tr>
<td>Market</td>
<td>Market where the ad, the service message or messages, or both were intercepted</td>
</tr>
<tr>
<td>ID</td>
<td>Short code or mobile program name associated with the audit</td>
</tr>
<tr>
<td>Call-to-Action</td>
<td>Location of the call-to-action</td>
</tr>
<tr>
<td>Language</td>
<td>Language (e.g., English, Spanish) employed in the ad or in the service message or messages</td>
</tr>
<tr>
<td>Audit Notice Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Source</td>
<td>Medium (e.g., online, print) where the ad or service message was intercepted originally</td>
</tr>
<tr>
<td>Location</td>
<td>URL or name of the medium (e.g., magazine) where the ad or service message was acquired</td>
</tr>
<tr>
<td>Keyword(^9)</td>
<td>Word or words associated with the program</td>
</tr>
<tr>
<td>Network Path</td>
<td>Hierarchy of companies associated with the audit</td>
</tr>
<tr>
<td>Acquisition Date</td>
<td>Date on which the ad or service message was intercepted</td>
</tr>
<tr>
<td>Notice Date</td>
<td>Date on which the audit was issued</td>
</tr>
</tbody>
</table>

### Compliance Details Section

<table>
<thead>
<tr>
<th>Audit Type(^10)</th>
<th>Category of the audit subject (e.g., Standard Rate Advertising, Standard Rate Customer Experience, Standard Rate Message Flow)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Standard</td>
<td>Infringement of the rules specific to the carrier</td>
</tr>
<tr>
<td>Severity</td>
<td>Number assigned to the infringement reflecting its gravity</td>
</tr>
<tr>
<td>Action Required</td>
<td>Step or steps required to bring the ad, the service message or messages, or both into compliance</td>
</tr>
</tbody>
</table>

### History Log Section

<table>
<thead>
<tr>
<th>Date</th>
<th>Date on which the comment was entered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>Name of the user who entered the comment</td>
</tr>
<tr>
<td>Notes</td>
<td>Observations, remarks, or queries regarding the audit notice</td>
</tr>
</tbody>
</table>

\(^9\) 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 client\(^\text{11}\) 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.

**Exhibit 21: Download Audit Notice PDF Detail**

---

\(^{11}\) 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**

![PDF Window Screen](image)

You can open the file to view or print it, or you can save it for your records.
3. 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.

Exhibit 23: Reports Page

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

![Exhibit 24: Example Report Page Tabs](image)

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.
Exhibit 25: Date Range Slider Bar

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.
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.

Modifying Data Results

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.

**Exhibit 29: Data Point Highlight**

In this case, you can see that all data for AG1 are highlighted.
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 us.support@wmcglobal.com 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 36: Partner Services Sign-In Button**

![Sign In Button](image)
Exhibit 37: Sign-In Page

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

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@wmglobal.com or by phone at +1 855 272 8182, Monday through Friday, from 9:00 A.M. and 5:00 P.M. EST.