CMR GATEWAY

CMR Gateway Publisher's
User Manual

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Chapter 1: About this Guide

CMR Gateway is a web-based software application that provides a centralized, uniformly formatted "Gateway" through which the National Channel can find marketing information and other supporting data on Yellow Pages Publishers across the U.S. and elsewhere. No longer do Certified Marketing Representatives (CMRs) need to visit multiple, individual publisher web sites and search for information that varies in format and location from publisher to publisher. All the desired information and tools you need from publishers are easily found in the same location and in the same format.

CMR Gateway was created by MediaTraks. MediaTraks is a "media clearinghouse" where print and online publishers can list their local advertising rates and where Media buyers can search for, compare, and purchase local advertising. MediaTraks also offers several on-demand applications that help media buyers research, track, report, and manage their ad buys.

This document provides usage instructions for Publishers using the CMR Gateway application.

In This Chapter

- Intended Audience
- Conventions
- Getting Help

Intended Audience

This guide is intended for use by Publishers. Basic knowledge of the yellow pages and ad placement in such books is assumed. Experience using browsers such as Internet Explorer is assumed.

Conventions

The following conventions are used in this manual.

Convention	Description
Bold	Actions you should take such as text or data to be typed exactly or items to click.
Italics	Items to type in which you must supply a value.

Getting Help

A complete on-line help system is available in the CMR Gateway interface by selecting the **Help** button in the upper right corner of the application. A blog button is also available in this area. See the blog documentation for operation of this feature.

If you need further assistance, please contact MediaTraks via e-mail at support@cmrgateway.com.

Chapter 2: Getting Started

CMR Gateway is a web-based application with customized features for CMRs and Publishers. Based on your login information, only those features that pertain to you are displayed. All features of the system are described in this manual.

Software Installation and Requirements

While no actual installation procedures are required for the operation of this application, it is recommended that you have a recent version of your browser, so that all features operate at full capacity.

In addition to the above requirements, you should have a functioning copy of Microsoft Excel®. While this is not absolutely required, it is recommend for publishers when adding directories.

Accessing the Application

Since the application is web-based, you must use an internet browser (such as Internet Explorer) to access the application.

To access the application:

1. Open your internet browser.
2. Go to the web site **www.cmrgateway.com**.
3. Register if you are new user or enter your existing login.

Registration

If you are a new user to the CMR Gateway, you must register to receive a username and password.

To register as a publisher:

1. Click the **Publisher Registration** link on the home page of cmrgateway.com.
   The Publisher agreement appears.
2. Click **I agree** to accept the terms of the Publisher agreement.

In This Chapter

- Software Installation and Requirements
- Accessing the Application
- Registration
- Login
- Understanding the Interface
- My Account information

The Publisher Account Information screen appears.

3. Enter account information.

   Note that a red * indicates a required field. Please note the e-mail account you supplied. If you forget your login password, you can request a reminder e-mail that is sent to this account.

4. Click **Submit Information**.

   You information is sent to MediaTraks. MediaTraks will contact you via e-mail with a link that allows you to create your username and password and any other necessary information.

Login

Once registration is complete and you have a username and password you may login to the CMR Gateway.

1. Click the **Login** link on the home page of cmrgateway.com.

   The Login screen appears.

2. Enter your **Username** and **Password**.

   These items were sent to you upon registration.

   If you have lost your username or password, you can click the **Forgot password** link. Enter the e-mail address you placed on your registration form. The information is sent to that e-mail account.

   You may change your password by clicking the **Change Username/Password** link. Enter your current username and password and click **Next Step**. Enter the new username and/or password.

3. Click **Login**.

   You are placed in your CMR Gateway's Publisher Home page. To the left is the Left Navigation bar. The Display area provides a welcome message and the right side of the screen provides a list of Publisher's notices as well as a Publisher and Directory Quick search. See "Quick Information Bar" on page 2-4 for a description of these features. The format of the home page is slightly different than the rest of the interface.

Note: CMRs receive a brief flash presentation explaining the benefits and operation if the CMR Gateway on their initial login to the system.

Note: Once logged in, you can logout by selecting the **Logout** feature from the left navigation bar.

Understanding the Interface

The CMR gateway interface is web-based. Items may differ slightly in appearance based on your browser. The interface is divided into four basic sections: Quick Information bar, Left Navigation bar, Display area, and In-line Help area. Most screens in the

application follow this format although some may use alternative formatting. For example, when more Display area is needed, the In-line Help area is often replaced.
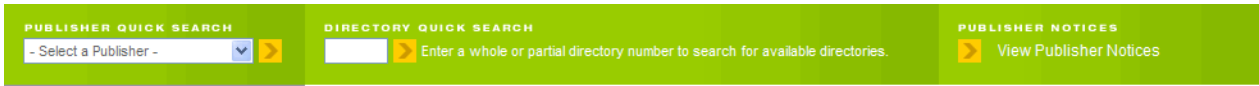
Quick Information Bar

Help

Left Navigation Bar

Display Area

In-line Help Area

Quick Information Bar

The Quick Information bar contains three options that provide easy access to commonly needed information.

Publisher Quick Search

The Publisher Quick Search allows you to search for publishers by name and displays all known information about the selected publisher.
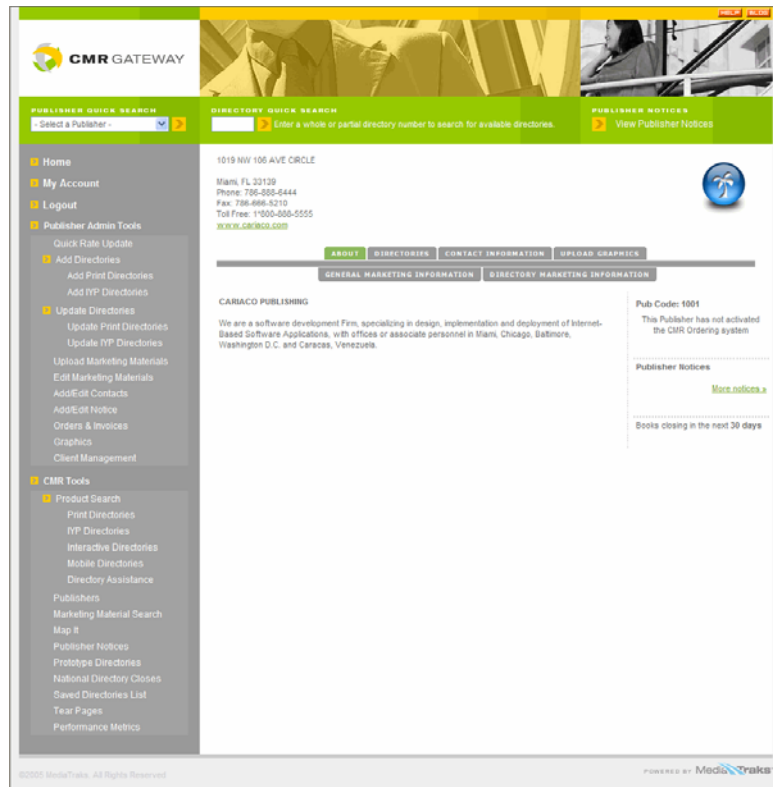
To use the publisher quick search:

1. Select the desired publisher from the pulldown list.

2. Click ▶ .

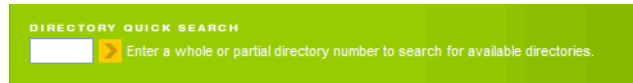   Information about the publisher is displayed in the Display area.

3. Use the tabs to view the desired information or make changes.

   See "Publisher Details" on page 7-5 for details about this screen.

Directory Quick Search

The Directory Quick search allows you to search for directories by number and displays all known information about the selected directory.

To use the directory quick search:

1. Select the desired directory from the pulldown list.

2. Click ▶ .

   Information about the directory is displayed in the display area.

3. Use the summary tables to view the desired information or to make changes.

   See "Finding Directories and Uploading Graphics" on page 7-1 for more information on directory summary tables.
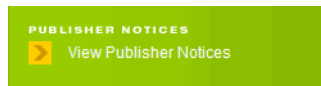
Publisher Notices

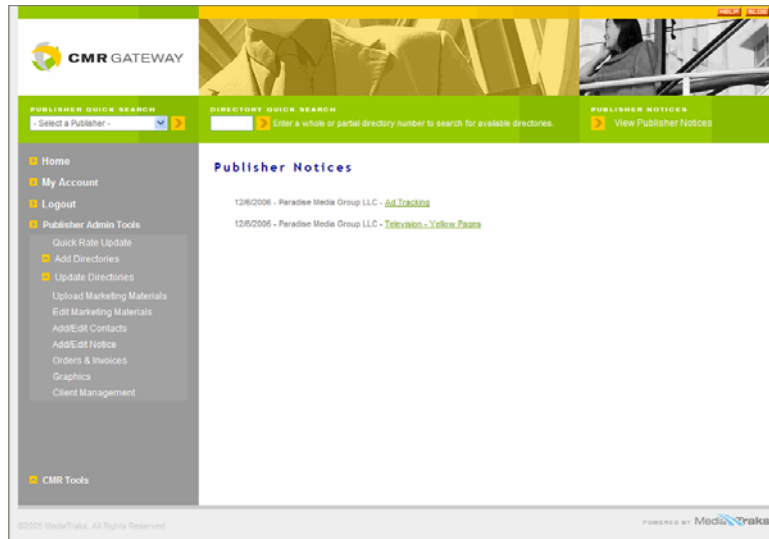Notices that have been entered by the publisher are viewable from this search.

To use the publisher notices search:

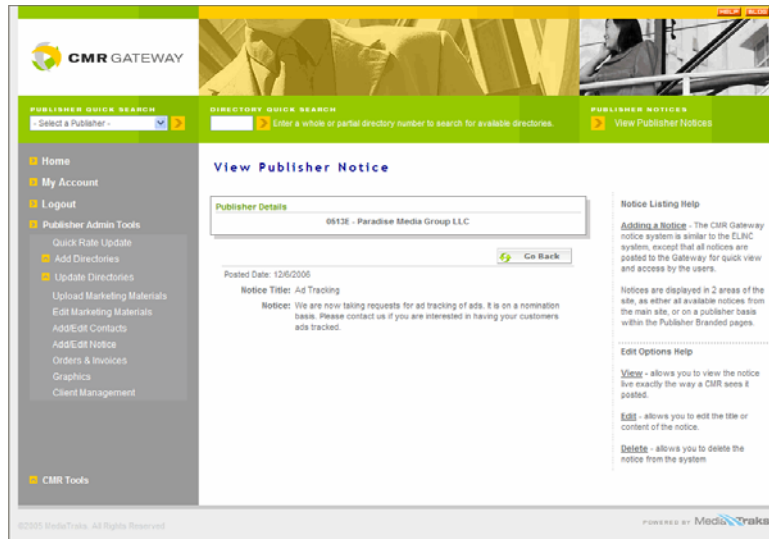1. Click the ▶ or the link to view notices.

All notices are displayed in short form in the Display area.

2. Click the link for the desired notice.
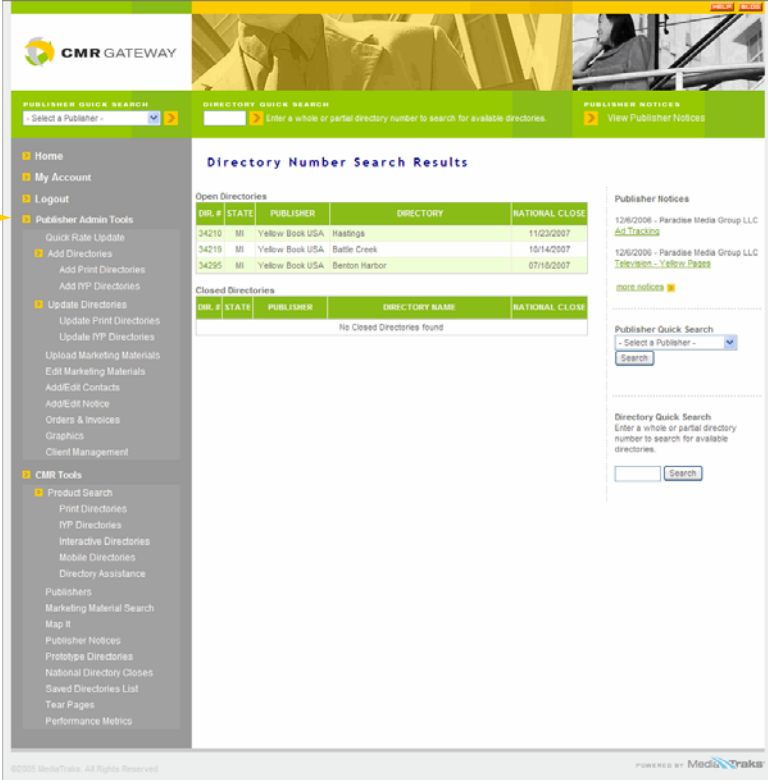
The entire notice is displayed.

Note: You can also access publisher notices via the CMR Tools>Publishers Notices link in the Left Navigation bar.

Left Navigation Bar

The Left Navigation bar provides quick access to the major features of CMR gateway.

For first-tier features, click the feature name. For multi-tier features, click the [>] to expand the feature sublist and click the desired item. The Left Navigation bar has two main areas: the Publisher Admin Tools and the CMR Tools. As a publisher, most of the information about your directories is entered via the Publisher Admin Tools. The CMR Tools information is there so that you may see what the CMRs see about your directories.

Left Navigation bar with tiered items open

Display Area

The Display area is where the major functionality for each feature is displayed. The display area can be used to view or edit items.

In-line Help

Where available, In-line Help describes specific items that are currently displayed in the Display area. A complete on-line help system is available by clicking the **Help** button in the upper right hand corner of the application.
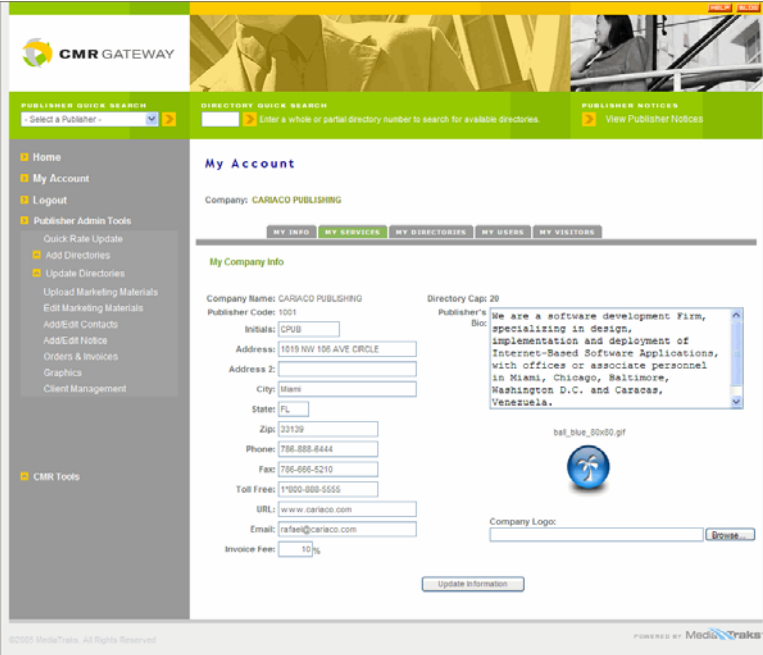
My Account Information

You can access a variety of information about your CMR Gateway account. Publishers can access information about their actual account, their listed services, their listed directories, account users, and clients that have visited their listings. CMRs can access information about their actual account, their listed services, and account users.

To access and update account information:

1. Login to the application.
2. Click My Account in the Left Navigation bar.

   Your account information is displayed with tabs available according to your login privileges. The following capture shows the publishers account with full privileges with the My Info tab open.

3. Click the desired tab to view and enter administrative information.
4. Click **Update Information** to save changes.

My Info

The My Info tab displays company information entered during the registration process. It also allows you to upload your company logo which is then displayed throughout the application. CMRs and publishers have access to items such as invoicing and graphics proofing. You can use the uploaded logo to brand these items.
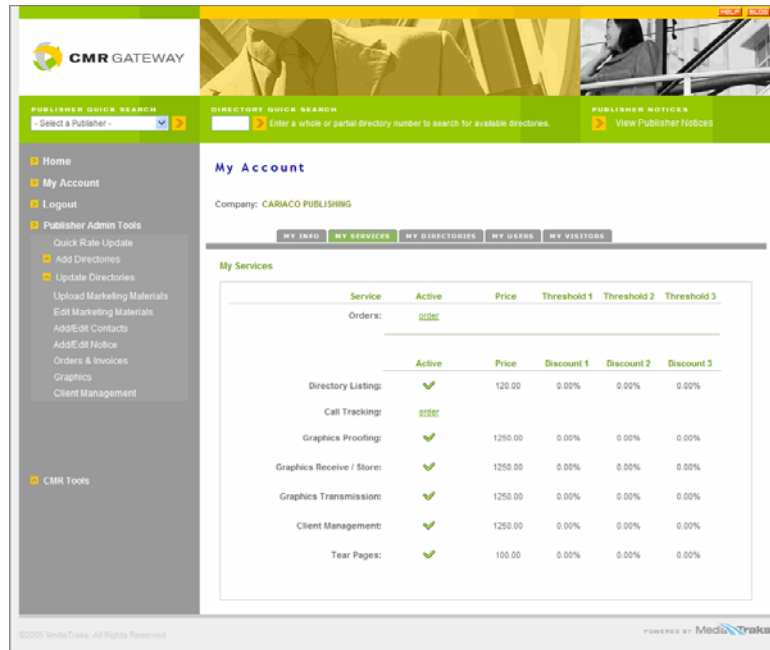
My Services

The My Services tab allows you to view the services for which you have subscribed and to subscribe to new services.
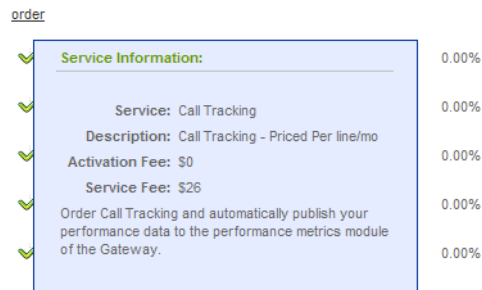
To order services:

1. Click the **My Services** tab.

   Information about existing services and unordered services is displayed.

2. Hover over the order link for the desired service.

   Information about the service is displayed.
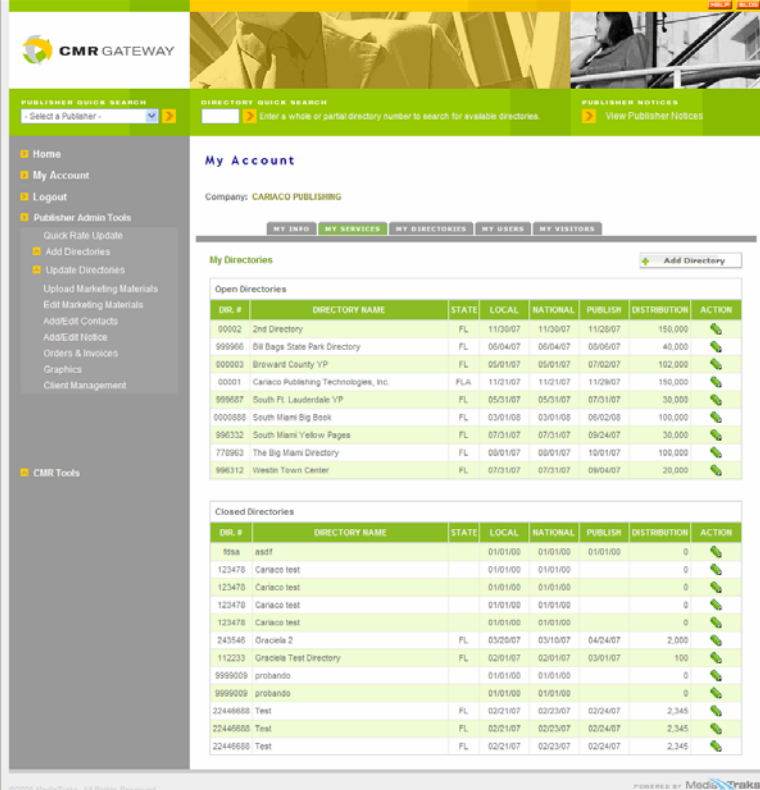

3. Click **order**.

A window appears allowing you to activate the service.

4. Click **Request Activation.**

My Directories

The My Directories tab provides summary tables for all of your listed directories. You can click the ✎ to edit directory information or click the **Add Directory** button to add new directories. This feature is only available to publishers. See "Adding and Updating Directories" on page 3-1 for information about editing directory information.

My Users

The My Users tab provides account management for your users of the CMR Gateway application. You can add users as well as modify the privileges of existing users.
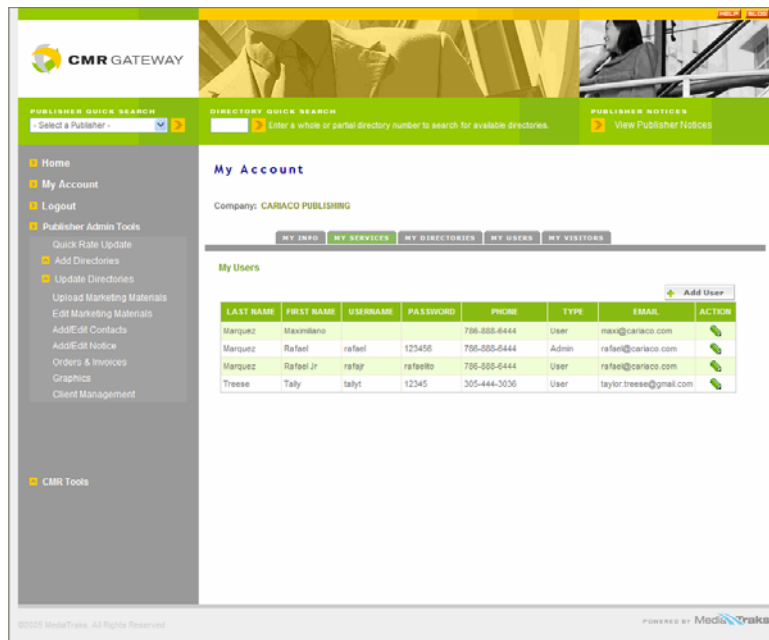
My Visitors

The My Visitors feature enables you to see the CMR visitors who are viewing your branded page and your directories as well as what pages they have visited, displaying on what day the visit took place and even the visitor's name. This is a publisher only feature.
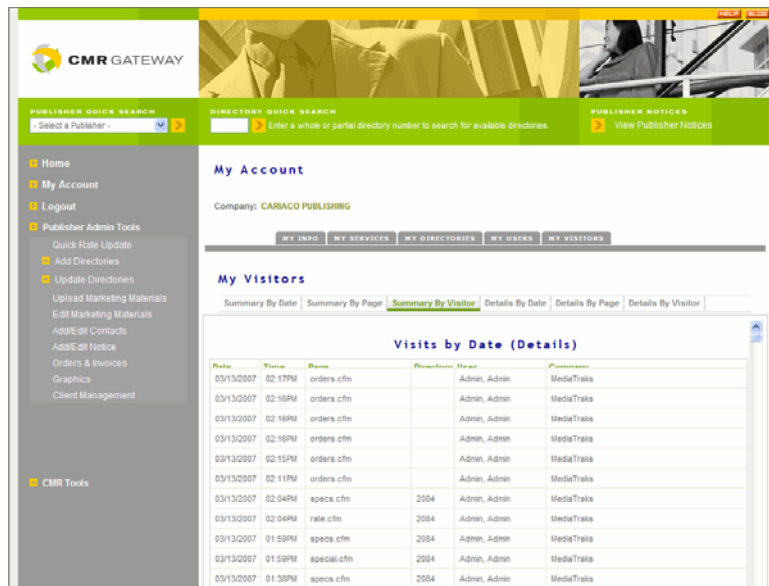
BizDetails

BizDetails is powered by Localeze™ and is a pay for service that can be activated in the My Account area. MediaTraks has partnered with Localeze to bring their powerful repository of Yellow Pages data to the CMR Gateway.

This web-based tool delivers access to the most comprehensive local business data ever compiled. You'll find information about specific Yellow Page directories as well as access detailed information on local businesses such as:

- Business categories
- Market-level views
- Advertising characteristics including: keywords, URLs, e-mail addresses, as well as ad size, type, and spend

With information this extensive, you can increase value for your clients by supporting their efforts in planning and lead generation as well as competitive and market analysis.

Chapter 3: Adding and Updating Directories

You can add multiple directories via the Publisher Admin Tools. Adding directories can be done completely on-line via the CMR Gateway application or in combination with the Microsoft Excel® spreadsheet that was sent to you via e-mail upon completion of your registration. This spreadsheet is also available for download in the application.

In This Chapter

- Understanding the Excel Spreadsheet
- On-line Data Entry Modes
- Adding/ Updating Print Directories
- Adding/ Updating IYP Directories
- Quick Rate Updates

Understanding the Excel Spreadsheet

When you registered as a Publisher in the CMR Gateway application, you received an e-mail with login information as well as a spreadsheet called *CMR Gateway Directory Listing Workbook*. This workbook can be used in conjunction with the on-line tools to update extensive directory information such as Ad codes and rates. The spreadsheet is provided so that you may easily manage large amounts of data. Spreadsheet data is used when entering information via Block mode. See "Block Mode" on page 3-4.

Note: Once data is copied from the spreadsheet, there is no mechanism for keeping the spreadsheet and on-line data in sync.

The spreadsheet tabs correlate to the tabs in the Add Print Directories screens. The following table defines the Add Print Directories' on-line and spreadsheet tabs.

Spreadsheet tab	On-line Tab
Directory Information	Directory
Rates	Rates
Special Rates	Special Rates
Delivery Information	Delivery
Headings	Headings
Ad Specifications	Ad Specs
N/A	Dims

The following table defines the Add IYP Directories on-line tabs and how they correlate to the spreadsheet tabs.

Spreadsheet tab	On-line Tab
Directory Information	Directory
Special Rates	Rates
Headings	Headings
Ad Specifications	Ad Specs
N/A	Dims

Entering Information into the Spreadsheet

The spreadsheet comes to you preformatted. Enter data only into the structure provided. Rates must be formatted as a number in Excel. Decimals are acceptable for cents. No cells in the rate column can be blank. You must place a zero in the cell if there is no charge. Zip codes for Delivery Information can be of any Excel cell format. There are no other special instructions for data entry formats in the spreadsheet.
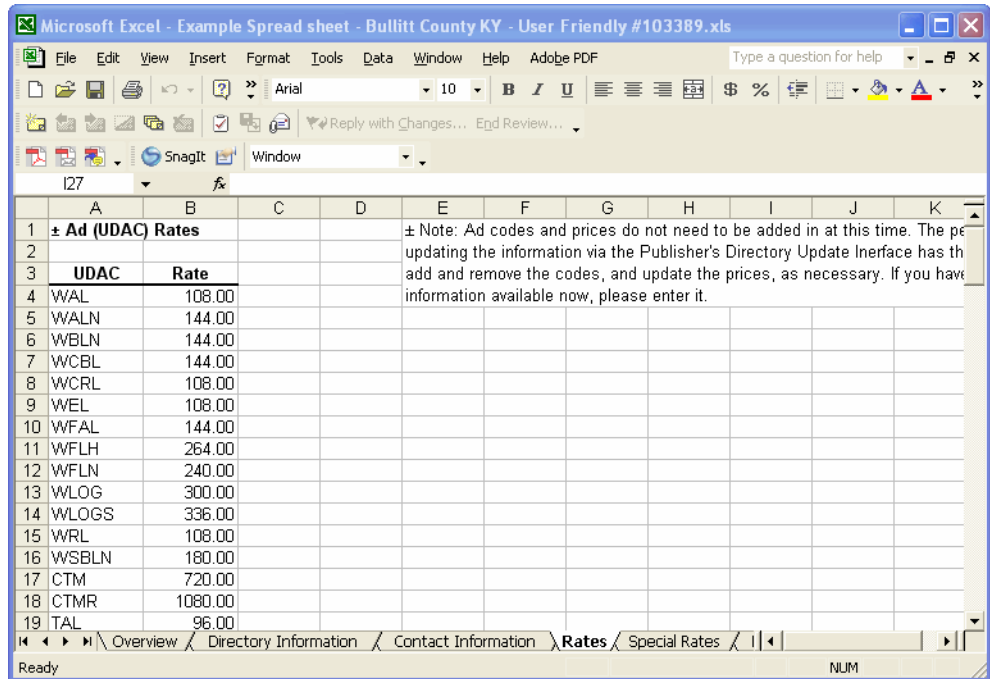
Copying Information out of the Spreadsheet

You may copy and paste information from your spreadsheet into the on-line tabs when in Block Mode. When you copy information from the spreadsheet, make sure you do not highlight the header row.

Note: Do not copy header rows from the spreadsheet into the on-line tab data entry block. Header information included in the copy process will cause your directory information to fail during the paste and update process.

Note: It is recommended that you copy information out of your spreadsheet as opposed to cutting it. You'll want to preserve your spreadsheet data for updates and backup.

To copy information out of your Excel spreadsheet:

1. Click **Publisher Admin Tools** in the Left Navigation bar.

    The menu expands to reveal multiple options.

2. Click **Add Directories**.

    The menu expands to reveal two options.

3. Click **Add Print Directory**.

    The Add Directory screen appears.

4. Select the desired tab within the Add Directories screen.

    The screen is repopulated with that tab's information and defaults to Block Mode, where applicable.

5. In your spreadsheet, select the desired tab.

6. Beginning with the first data row (not header row) highlight all populated cells.

	A	B	C	D	E	F	G	H	I	J	K
2					updating the information via the Publisher's Directory Update Inerface has th						
3	**UDAC**	**Rate**			add and remove the codes, and update the prices, as necessary. If you have						
4	WAL	108.00			information available now, please enter it.						
5	WALN	144.00									
6	WBLN	144.00									
7	WCBL	144.00									
8	WCRL	108.00									
9	WEL	108.00									
10	WFAL	144.00									
11	WFLH	264.00									
12	WFLN	240.00									
13	WLOG	300.00									
14	WLOGS	336.00									
15	WRL	108.00									
16	WSBLN	180.00									
17	CTM	720.00									
18	CTMR	1080.00									
19	TAL	96.00									
20	TALR	144.00									

Overview / Directory Information / Contact Information \ Rates / Special Rates /

7. Press CTRL-C.

8. Return to your CMR Gateway application at the Block mode entry box.

9. If this is the first time you are entering information, click inside the data entry box and press CTRL-V. If you are updating a directory, highlight all the data in the data block first and then press CTRL-V to replace all the old ad codes with the new ones.

Note: When copying over information to update a directory, copy the entire tab's contents. Do not overwrite or you will loose that data.

On-line Data Entry Modes

Two modes are available on-line for entering data.

Block Mode

If you maintain large amounts of data in your spreadsheet, you can copy that data from the spread sheet to on-line via Block mode as described in "Copying Information out of the Spreadsheet" on page 3-2. To access Block Mode, click the **Block Mode** button where available.

Note: When copying over information to update a directory, copy the entire tab's contents. Do not overwrite or you will loose that data.

Note: Do not copy header rows from the spreadsheet into the on-line tab data entry block. Header information included in the copy process will cause your directory information to fail during the paste and update process.

Note: It is recommended that you copy information out of your spreadsheet as opposed to cutting it. You'll want to preserve your spreadsheet data for updates and backup.

Note: There is one special type of Block mode which is used only on the Dimensions tab. You must know HTML to use Block mode on this tab.

Table Mode
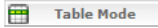
You can enter data line by line by using the Table mode feature. This mode lets you enter line items via forms in the application. There is no dependency on the spreadsheet. To use table mode, click the **Table Mode** button where available.

Table mode becomes available when adding directories after the directory information has been entered and saved. It becomes available in Update Directories after you have selected the publisher and the desired directory.

Note: There is no mechanism for keeping the spreadsheet and on-line data in sync. Data entered via Table mode is not reflected in your spreadsheet.

Adding/Updating Print Directories

You can add print directories using a combination of on-line and spreadsheet import techniques.

To add a print directory:

1. Click **Publisher Admin Tools** in the Left Navigation bar.

   The menu expands to reveal multiple options.

2. Click **Add Directories**.

   The menu expands to reveal two options.

3. Click **Add Print Directory**.

   The Add a Directory screen appears.

4. Enter the desired information in each tab.

5. Click **Save Directory**.

   Once Directory information has been entered on the first tab and the directory has been saved, the screens are identical to Update Directory.

Note: You can click Save Directory at the end of each tab. When this button is clicked, all entered information is saved. You can go back at a later time to enter or change information using the Update Directory feature "Adding/Updating Print Directories" on page 3-5.

To update a print directory:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Update Directories** in the left navigation bar.

   The menu expands to reveal two options.

3. Click **Update Print Directory**.

   The Publisher Sites screen appears.

4. Select the desired Publisher from the list.

   The Modify Information Screen appears.

5. Select the desired directory name.

The Directory Information screen appears populated with existing information.

6. Modify the desired information in each tab.

7. Click **Save Directory**.

Directory Information

The Directory Information tab allows you to enter information about your directory.

To add directory information:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **Add Directories** in the left navigation bar.

    The menu expands to reveal two options.

3. Click **Add Print Directory**.

    The Add a Directory screen appears.

4. Click the **Directory Information** tab.

    The display area repopulates with directory information items.

5. Enter the desired Directory Information.

    Distribution and Electronic distribution are the numbers of directories that are distributed in the specified format. The number of columns is the number of columns available per page.

Note: Although you can enter this same information in the Directory Information of your Excel spreadsheet, there is no mechanism to copy that information on-line. It must be entered manually on-line.

6. Click **Save Directory**.

Note: Prior to entering directory information and clicking the Save directory button, other tabs in the Add Print Directory have only Block mode enabled. Upon saving the directory, a Table mode button appears in applicable tabs and the remaining data entry process is identical to the Update Print Directories process.

Rates

It is recommended that you use your Excel spreadsheet to enter large blocks of rates. Enter the rates into your spreadsheet and then copy into the application using Block mode. See "Block Mode" on page 3-4 and "Copying Information out of the Spreadsheet" on page 3-2 for more information.

Print directory rates are based on Universal Directory Add Codes (UDAC). These are National codes that are standardized across the United States and only acceptable UDACs will be displayed in the rates page for each publisher. If you have non-standard codes they must be entered in the Special Rates tab. See "Special Rates" on page 3-8.

In your spreadsheet, rates must be formatted as number cells in Excel. Decimals are acceptable for cents. No cells in the rate column can be blank. You must place a zero in the cell if there is no charge.

To add or update rate information:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Add Directories** in the left navigation bar.

   The menu expands to reveal two options.

3. Click **Add Print Directory**.

   The Add a Directory screen appears.

4. Click the **Rates** tab.

   Enter the desired rate information via Block mode or Table mode (if available).

5. Click **Save Directory**.

Special Rates

You can enter special ad codes in the Special Rates tab (non-acceptable UDACs). The special rates data in the spreadsheet must be formatted in the same manner as rates (see "Rates" on page 3-7).

To add or update rate information:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.
2. Click **Add Directories** in the left navigation bar.

   The menu expands to reveal two options.
3. Click **Add Print Directory**.

   The Add a Directory screen appears.
4. Click the **Special Rates** tab.

   Enter the desired rate information via Block mode or Table mode (if available).

5. Click **Save Directory**.

Delivery Information

The Delivery Information tab allows you to enter a list of zip codes that represent that directory's delivery area. Only zip code data entry is needed here. Town and county-level details are displayed by extrapolating this data for you from our large database of US-based zip codes, towns, and counties.

Zip codes do not need to be formatted as a numbered cell in the spreadsheet. There can be no empty fields in the spreadsheet.

To add or update delivery information:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.
2. Click **Add Directories** in the left navigation bar.

   The menu expands to reveal two options.
3. Click **Add Print Directory**.

   The Add a Directory screen appears.

4. Click the **Delivery Information** tab.

   Enter the desired rate information via Block mode or Table mode (if available).
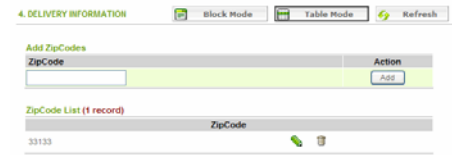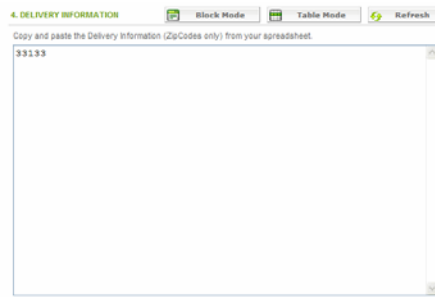
5. Click **Save Directory**.

Headings

The Headings tab allows you to enter a list of headings that exist for your directory. For example, Accountants. For each heading, you must also provide a code. There is no standardized listing of heading codes and your company may come up with its own code structure. You may use sequential numbers which is a simple formatting option when adding rows in Excel. There can be no empty cells in the spreadsheet.

To add or update headings:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **Add Directories** in the left navigation bar.

    The menu expands to reveal two options.

3. Click **Add Print Directory**.

    The Add a Directory screen appears.

4. Click the **Delivery Information** tab.

    Enter the desired rate information via Block mode or Table mode (if available).
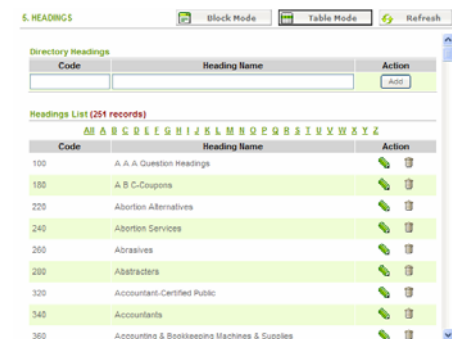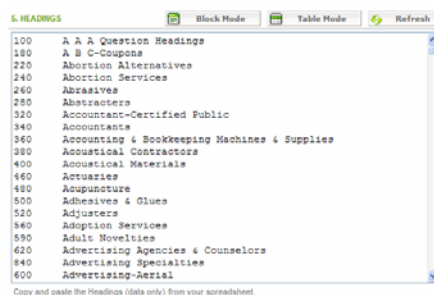
5. Click **Save Directory**.

Ad Specifications

The Ad Specifications tab allows you to enter specifications for ad layout.

To add or update ad specification:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Add Directories** in the left navigation bar.

   The menu expands to reveal two options.

3. Click **Add Print Directory**.

   The Add a Directory screen appears.

4. Click the **Ad Specifications** tab.

   Enter the desired ad specification information on-line. Lists of items such as acceptable file extensions are entered in a comma separated list. For example: gif, jpg, psd.

Note: Although you can enter this same information in the Ad Specifications tab of your Excel spreadsheet, there is no mechanism to copy that information on-line. It must be entered manually on-line.

5. Click **Save Directory**.

DIMS

The Dims tab allows you to enter specifications for the dimensions of the directory itself and for ad dimensions. This tab is available only on-line. A tab does not exist in the spreadsheet. Table mode is recommend for all data entry on this tab. Block mode operation is different for this tab. You must have knowledge of HTML to enter information in block mode for dimensions.

To add or update dimension specifications:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **Add Directories** in the left navigation bar.

    The menu expands to reveal two options.

3. Click **Add Print Directory**.

    The Add a Directory screen appears.

4. Click the **DIMS** tab.

    Dimensions entry data appears.

5. Enter the desired directory information on-line.
6. Enter the desired ad dimension information on-line.
7. Click **Add** for each allowed dimension.

    The dimensions are added to the table below.

8. Click **Save Directory**.

Adding/Updating IYP Directories

Adding and updating IYP Directories is very similar to adding and updating print directories. The main differences are that not all tabs are available for IYP directories and that IYP directories are not dependent on an acceptable UDAC list. It is important to note that the Special Rates tab in Print Directories and the Rates tab in IYP directories

are equivalent (in both the spreadsheet and on-line). They can both use custom codes. See "Adding/Updating Print Directories" on page 3-5 for information on each available tab.

Quick Rate Updates

If you prefer to wipe away all your existing rates or special rates and have them replaced by a completely new list of rates or special rates, you can use the convenient Quick Rate Update feature to upload your rates from a spreadsheet. This method is quicker than going through the Update Directory screens. These are special spreadsheets (CSV formats). There is one for special rates and one for regular rates. These files are sent to you from MediaTraks at some point after you have been working in the system. See "Understanding the Excel Spreadsheet" on page 3-13 for details about these spreadsheets.

To quickly update only your rates:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Quick Rate Update** in the left navigation bar.

   The display area is populated with Quick Update selections.
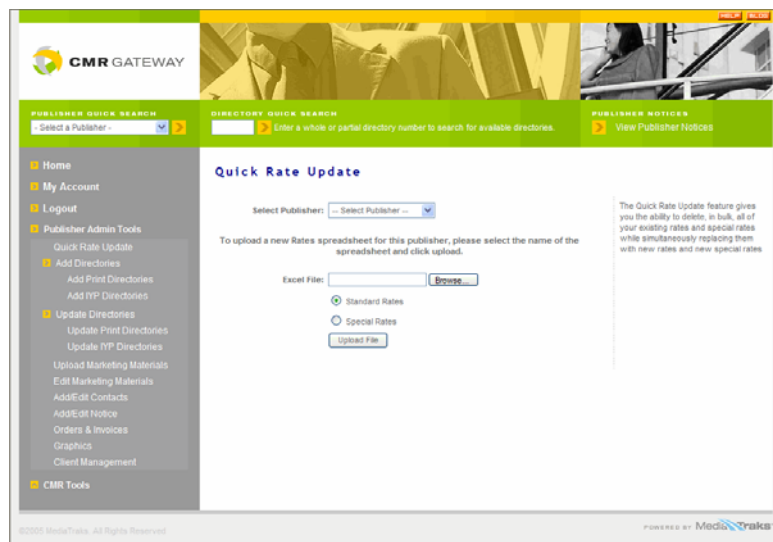
3. Select the desired Publisher.
4. Click the **Browse** button to search your network or drive for the desired spreadsheet file file and select that file.
5. Indicate whether you are updating rates or special rates via the radio buttons.
6. Click **Upload File**.

Understanding the Excel Spreadsheet

In order for your rates to be quickly updated from the Excel spreadsheet, you must enter data correctly on the spreadsheet. Unlike the Add Print Directories Spreadsheet, the Quick Rate Update spreadsheets are Comma Separated Value (CSV) formatted. The spreadsheet must remain in this format to be properly read after upload. There are no header rows in this spreadsheet to avoid possible parsing errors. Do not add headers.

Rates

The Quick Rates Update spreadsheet has the following columns:

Column	Description
B	Numeric Directory Code.
C	National UDAC/Item Code.
F	Annual National Rate for relevant National UDAC found in column 'C' of same data row.

Special Rates

The Quick Special Rates Update spreadsheet has the following columns:

Column	Description
B	Special Pricing numeric code for Marketing Program to which UDAC and Rate apply.
D	Numeric Directory Code.
E	Special Pricing Category description reference codes applicable to the UDAC and rate shown in same row of data.
F	National UDAC/Item Code.
I	Annual National Rate for relevant National UDAC found in column 'F' of the same data row.

Chapter 4: Marketing Materials and Graphics Management

It is important that as CMRs navigate the system they can see your Marketing materials and use them to make purchasing decisions. The CMR Gateway allows you to display your company and directory marketing materials to CMRs.

The CMR Gateway also provides the tools you need to manage ad graphics transmitted by CMRs as well as a value added proofing mechanisms for managing the ad proofing process with other advertising clients.

Uploading Marketing Materials

You can upload your Marketing Materials so that CMRs can view them on-line. You can display General Marketing Materials so that CMRs can learn about your company or Marketing Materials that describe a specific directory.

General Marketing Materials

General Marketing Materials are marketing materials that are universal for all directories or specific to your company. For example: Heading Lists, Special Pricing, CMR Forms, Logos, and Ad Specifications.

To upload general marketing materials:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Upload Marketing Materials**.

In This Chapter

- Uploading Marketing Materials
- Editing Marketing Materials
- Managing CMR Graphics
- Graphics Proofing
- Tear Pages

Marketing Materials and Graphics Manage-

The Marketing Information Interface is displayed.
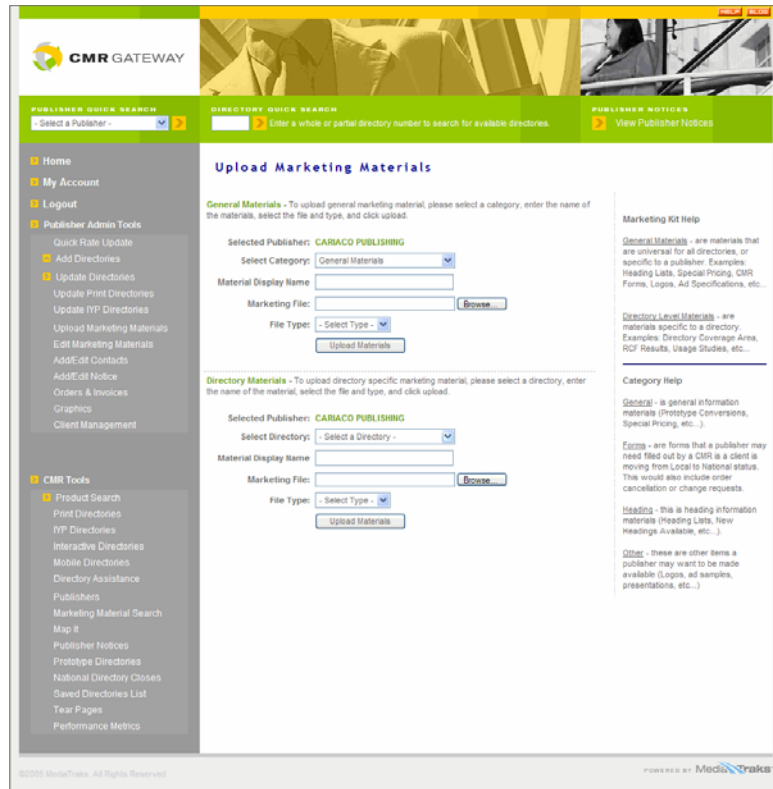
3. In the General Materials area (top half of page), select the Category Type.

The following table describes each category type:

Category	Description
General	General information materials (Prototype Conversions and Special Pricing).
Forms	Forms that you may need filled out by a CMR as a client is moving from Local to National status. This would also include order cancellation or change requests.
Heading	Heading information materials (Heading Lists and New Headings Available).
Other	Other items you may want to make available (Logos, ad samples, and presentations).

4. Enter the name you want the CMR to see when searching through your marketing materials.

5. Browse to select the desired marketing file.

6. Choose the file type of the selected file.

7. Click **Upload Materials**.

Directory Marketing Materials

Directory Marketing Materials are materials specific to a directory. For Example: Directory Coverage Area, RCF Results, and Usage Studies.

To upload directory marketing materials:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Upload Marketing Materials**.

   The Marketing Information Interface is displayed.

3. In the Director Materials area (bottom half of page), select the name of the directory for which the materials apply.

4. Enter the name you want the CMR to see when searching through your marketing Materials.

5. Browse to select the desired marketing file.

6. Select the file type.

7. Click **Upload Materials**.

Editing Marketing Materials

Once Marketing Materials have been uploaded, you can edit, replace, or delete them.

Note: All editing features open in new windows. Once a change has been made, click **Refresh List** to reload the materials.

To edit marketing files:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **Edit Marketing Materials**.

    The Marketing Materials Edit Interface is displayed.

3. If you are editing General Materials go to step 5. If you are editing Directory Materials go to step 4.

4. Select the desired directory name and click **Display**.

    The marketing materials are listed in a summary table.

5. Select the editing action for the desired item listed in the table.

Action	Description
Edit	Select this option if you wish to edit the title, category, or file type for a specific marketing material.
Replace	Select this option if you wish to replace an existing file with a new file. The file name and category remain the same.
Delete	Select this option if you wish to delete the file from the system completely.

Note: When replacing an existing file within the system, you also select the file type.
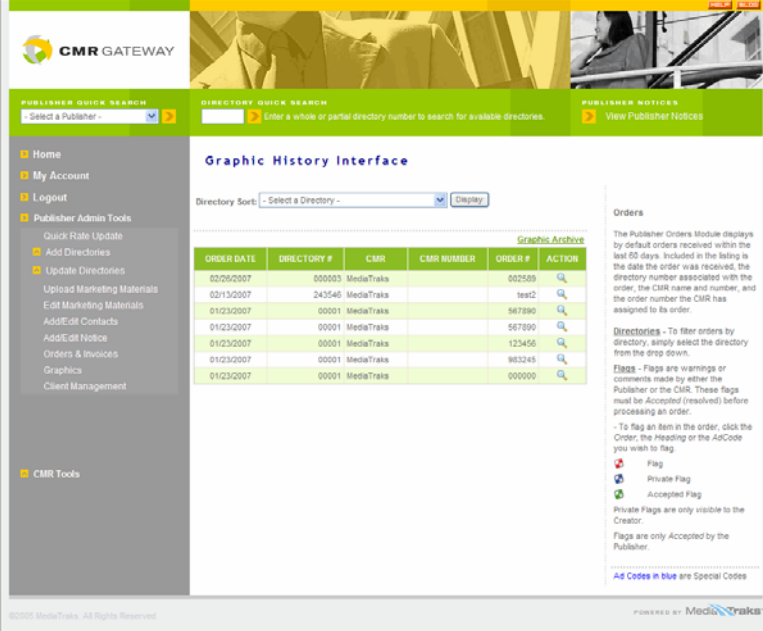
Managing CMR Graphics

As CMRs receive graphic files from their clients, those files can be transmitted to you for inclusion in your directories. The CMR gateway provides a mechanism for tracking these graphics files. The Graphics History interface allows you to locate and view CMR provided graphics. You can locate a graphic by directory name or search the graphics archive to locate a specific item.

To locate graphics by directory name:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Graphics**.

   The Graphics Page is displayed.

3. Click **Go to Graphics History Interface** in the top half of the screen.

Marketing Materials and Graphics Manage-

The Graphics History Interface is displayed. Links to all graphics from all directories are displayed in the table. You can click the 🔍 within the table to view the graphic. You may also search for a specific directory.
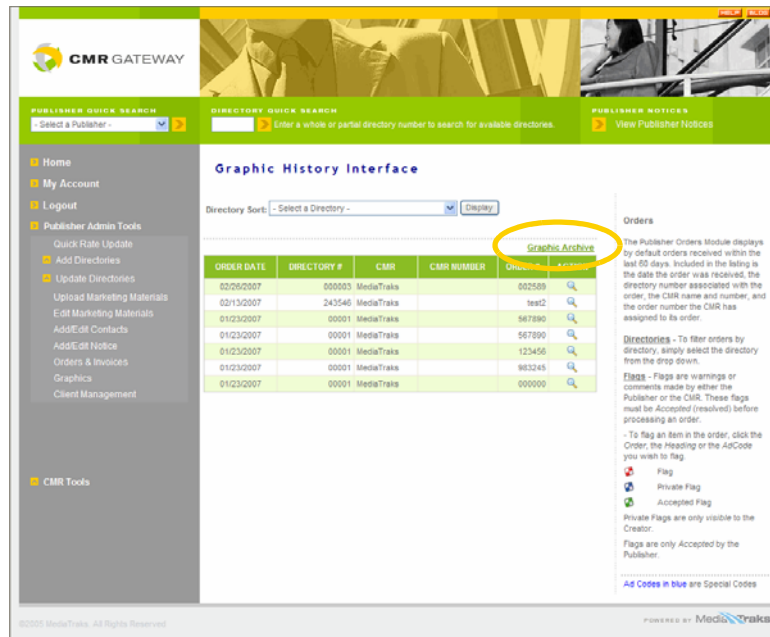

4. Select the directory name from the list and click **Display**.

5. Click the 🔍 within the table to view the graphic.

To search the graphic archive:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Graphics**.

   The Graphics Page is displayed.

3. Click **Go to Graphics History Interface** in the top half of the screen.

The Graphics History Interface is displayed. Links to all graphics from all directories are displayed in the table. You can click the 🔍 within the table to view the graphic. You may also search for a specific file.

4. Click **Graphic Archive**.

The screen is repopulated with search criteria.
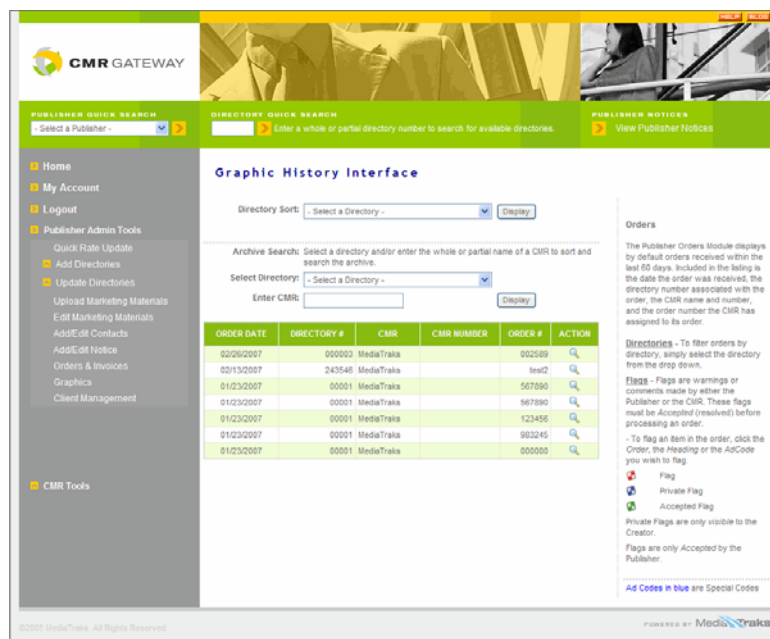
5. Enter the desired search criteria and click **Display**.

6. Click the 🔍 within the table to view the graphic.

Graphics Proofing

As a value-add, the CMR Gateway provides you a proofing mechanism for managing the graphics proofing process with your local clients. You can manage graphics already uploaded, manage clients, and review graphics status.

Managing Uploaded Graphics

You can review graphics that have been uploaded to the system for client ads and send these graphics to clients for approval.

To manage uploaded graphics ready for proofing:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.
2. Click **Graphics**.

    The Graphics Page is displayed.
3. Click **Go to Graphics Proofing** in the bottom half of the screen.

    You are placed in the Manage Graphics tab.
4. Select the desired Client.

    A summary table appears with available graphics to proof.
5. Select the desired action.

    You can sand a message internally to your organization (not to the client) using the ✎. You can view the graphic using the 🔍. You can e-mail your clients a direct link within the system at which they can review and approve proofs using the 🔍. When clients view this message and click the link, they open a browser window where they can see the graphic and approve it or enter a change request. When you view reports via the reports tab, the status of the graphic's approval is displayed.

Review Graphic Proofing Status

You can review the status of graphics that have been sent to clients for approval.

To access the graphics proofing management system:
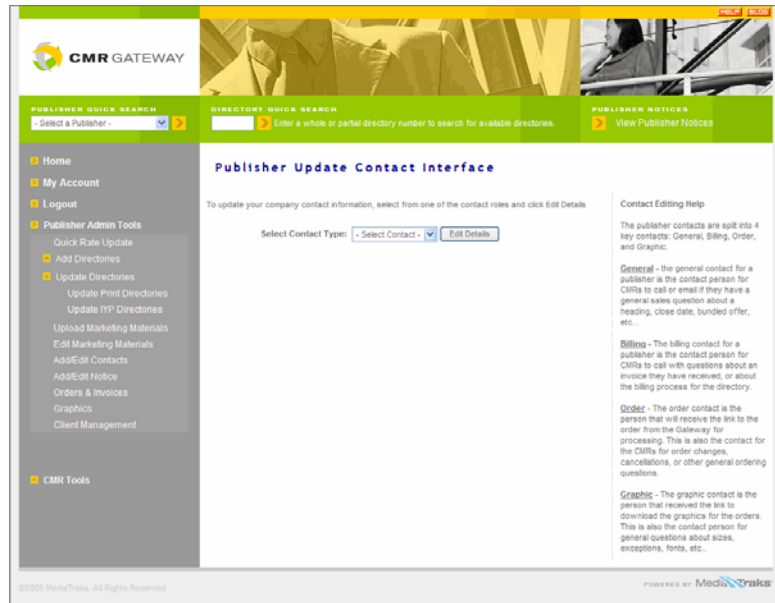
1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.
2. Click **Graphics**.

    The Graphics Page is displayed.
3. Click **Go to Graphics Proofing** in the bottom half of the screen.

    You are placed in the Manage Graphics tab.
4. Click the **Reports** tab.

    A summary table appears with available Status for all graphics. You can narrow the data displayed by entering the search criteria above the table. A check mark indicates whether the graphic has been approved or a change request has been entered.

Client Management

The Clients tab operates in the same manner as the Client Management feature. See "Client Management" on page 3-3 for more information.

Tear Pages

Tear pages can be uploaded to the CMR Gateway by publishers for CMRs to view. Tear pages may be sent in any graphics or graphics authoring format using the Graphics Client available for download on the Graphics Proofing page. The ability to upload tear pages is an add-on feature to the CMR Gateway and is paid for separately. The actual tear pages can be viewed by CMRs via Tear Pages in CMR Tools.

To access the graphics proofing management system:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Tear Pages**.

   The left navigation bar is repopulated with search criteria.

3. Select the publisher, directory, section, and page view or enter search criteria.

   Search criteria can be AND, OR, NOT, and parentheses (). Surround specific phrases with quotation marks.

4. Click **Search**.

   The results are displayed in the Results box.

5. Click a Result.

   The tear page is displayed in the Display area. Use the Home link to return to the default left navigation bar.

Marketing Materials and Graphics Manage-

Chapter 5: Client and Contact Management

You can manage your client and contact list through the CMR Gateway as well as supply notices to CMRs about your directories.

Adding and Editing Contacts

There are typically multiple contacts at each publisher site that a CMR might need when deciding to purchase or when purchasing. There are four types of contacts you can maintain for CMRs:

| Contact Type	Description
General	The contact person for CMRs to call or e-mail if they have a general sales question about a heading, close date, and bundled offer.
Billing	The contact person for CMRs to call with questions about an invoice they have received, or about the billing process for the directory.
Order	The person that receives the link to the order from the Gateway for processing. This is also the contact for the CMRs for order changes, cancellations, or other general ordering questions.
Graphic	The person that receives the link to download the graphics for the orders. This is also the contact person for general questions about sizes, exceptions, and fonts.

To edit or add contacts:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Add/Edit Contacts**.

The Publisher Update Contact Interface is displayed.

3. Select the desired contact type.
4. Click **Edit Details**.

The page is repopulated with the contact's information. The General Information contact sheet is shown here.
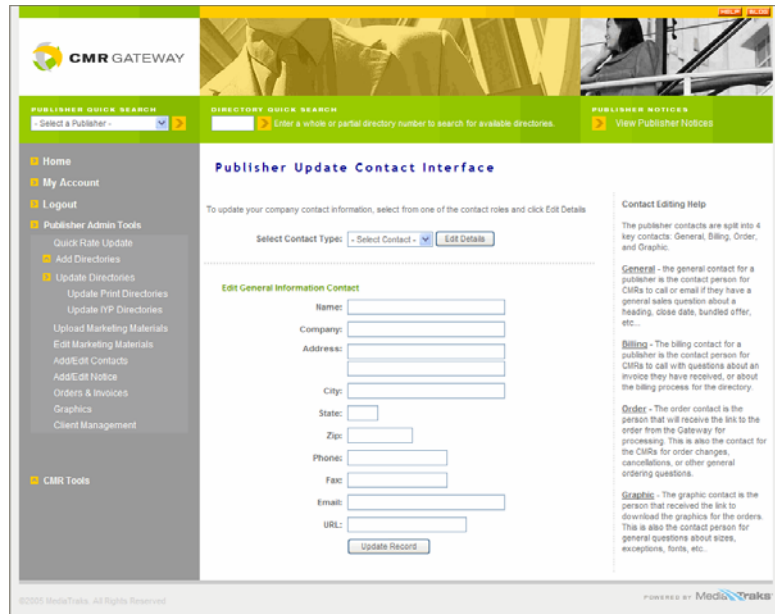
5. Enter/Modify the desired criteria.
6. Click **Update Record**.

Client Management

For local clients that do not order through CMRs, the CMR gateway provides a database tracking system. CMRs can also be considered clients for the purposes of this module.

To add clients:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Client Management**.

   The Client Management page is displayed.

3. Click **Add Client**.

   The page is repopulated with the data entry information.

4. Enter the desired criteria.
5. Click **Add Client**.

To edit clients:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Client Management**.

   The Client Management page is displayed with a table listing existing clients.

3. Click the ✎ for the desired client.

The page is repopulated with the data entry information. It also displays all orders and invoices for that client.

4. Enter the desired criteria.
5. Click **Modify Client**.

From this screen, you can also delete the client.

Adding and Editing Notices

Adding Notices

The CMR Gateway notice system has two types of notices; general and directory specific. Notices can be viewed via the Quick Access bar, the Publisher Notices link in CMR Tools, or by viewing a notice on a specific directory details page.

You can add a directory or a general publisher notice.

General Publisher Notices

General notices are about the publisher or are global for all directories.

To add notices:

1. Click **Publisher Admin Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **Add/Edit Notices.**

The Notice Interface page is displayed.
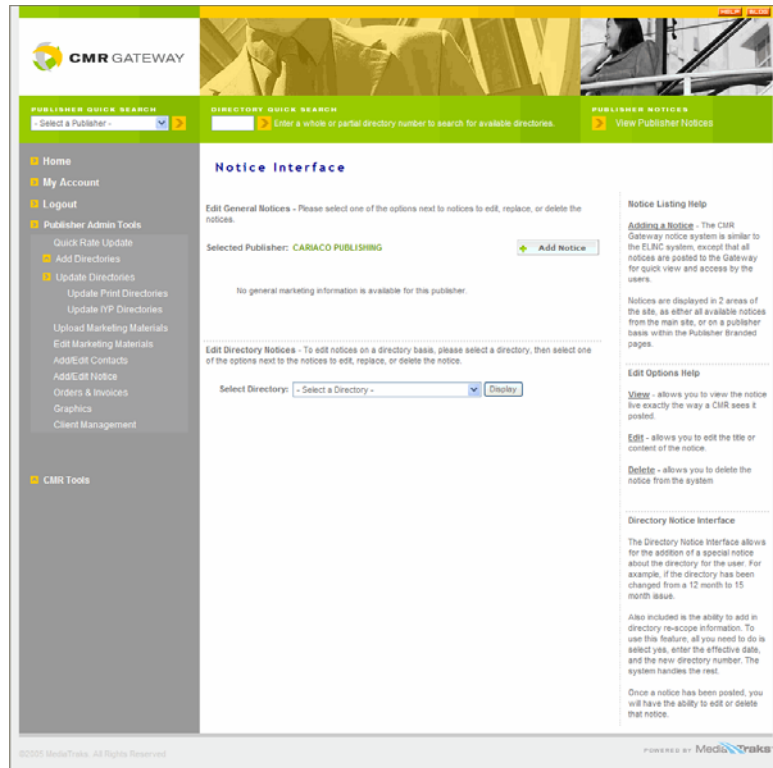
3. At the top half of the page, Click **Add Notice**.

The page is repopulated with the data entry information.
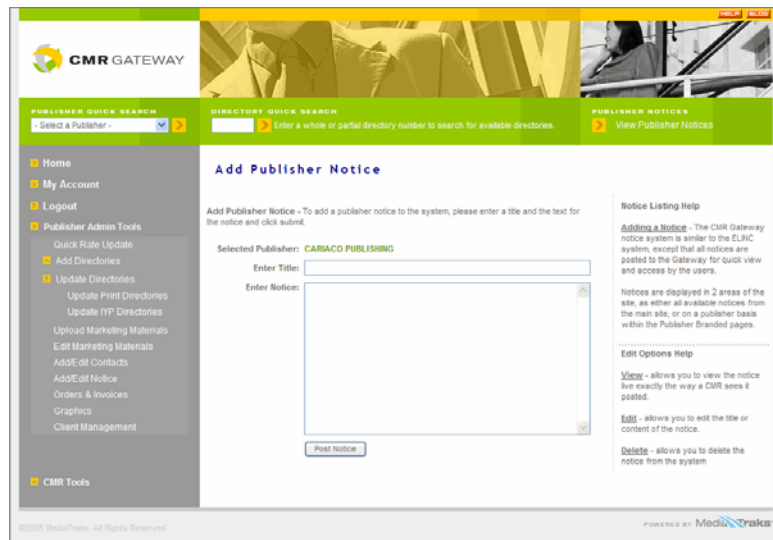
4. Enter the title of the notice and the notice text.
5. Click **Post Notice**.

Directory Notices

The Directory Notice Interface lets you add a special notice about the directory for the CMR. For example, if the directory has been changed from a 12 month to 15 month issue.

Once a notice has been posted, you have the ability to edit or delete that notice.

To add directory notices:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Add/Edit Notices.**

   The Notice Interface page is displayed.
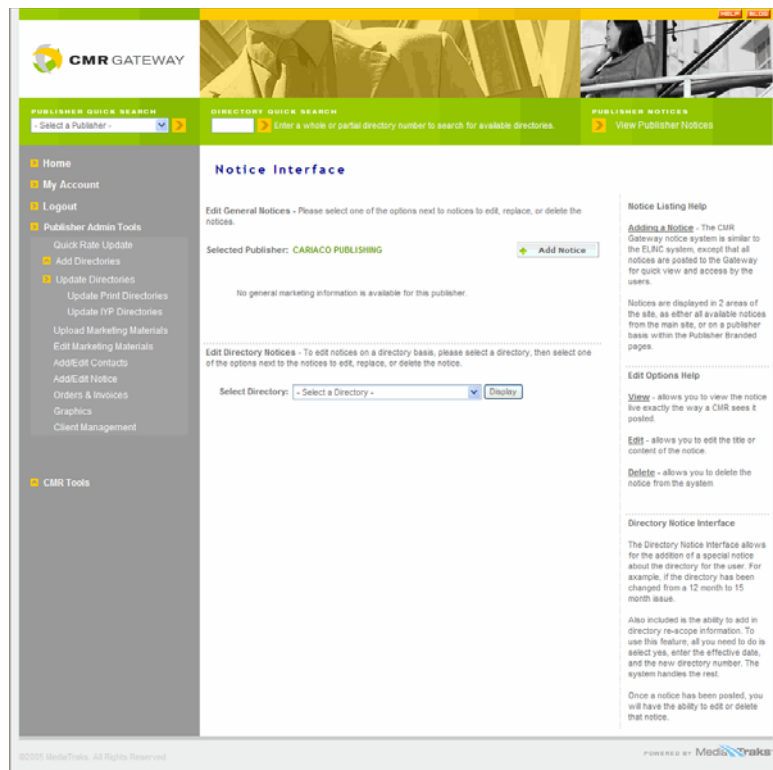
3. Select the directory from the list provided in the bottom half of the page and click **Display**.

4. In the same area, Click **Add Notice**.

The page is repopulated with the data entry information.

5. Enter the desired notice text and re-scope criteria (if desired).

   You can add directory re-scope information. If this is a re-scope notice, select yes, enter the effective date, and enter the new directory number. The system handles the rest.

6. Click **Submit**.

Chapter 6: Client Accounting

You can manage your client orders and invoices through the CMR Gateway.

Orders

The Publisher Orders module displays orders received within the last 60 days. Included in the summary table listing is the date the order was received, the directory number associated with the order, the CMR name and number, and the order number the CMR has assigned to the order. Separate summary tables are provided for closed, rejected, processed, and submitted orders. You can filter orders by directory. Flags provide warnings or comments made by either the Publisher or the CMR. These flags must be accepted (resolved) by publishers before processing an order.

The order process is not always linear. For some reason you may not be able to accept a submitted order. The CMR Gateway provides the mechanisms to flag, reject, and accept submitted orders. A typical order process could be:

1. Locate the order.
2. View the order.
3. Flag and reject the order.
4. Accept the flags and process a resubmitted order.

Locating Orders

Using the summary tables, you can locate specific orders in specific stages of the ordering process.

To search for specific orders:

1. Click **Publisher Admin Tools** in the left navigation bar.
   The menu expands to reveal multiple options.
2. Click **Orders and Invoices**.
3. Click **Go to Orders** in the top half of the screen.

The Publisher Order page is displayed.

All orders are provided in the summary tables. The tables are listed from the most current processing action to the least current. The following summary tables are available:

Summary Table Name	Description
Closed	Closed orders have no additionally functionality and may be viewed
Processed	Processed orders can be closed.
Rejected	An order has been rejected. All Rejected orders must be reviewed and then processed.
Submitted	An order has been placed. All submitted orders must be reviewed and processed or rejected.

4. If desired, select the desired directory, status, and date to sort orders.

5. Click **View Orders**.

The order tables are displayed as requested.

Viewing Orders

You can view any order listed in any of the summary tables.

To view the orders:

1. In the action column for the desired order, click the word **Process**, if available.
   The order is displayed.
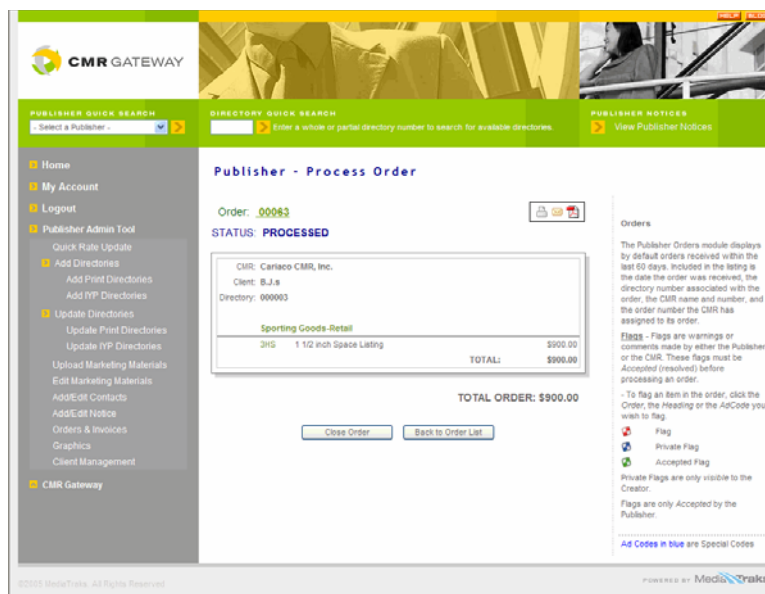
You can print, e-mail, or export this order to a PDF document. If the order is submitted or rejected, you can take action on the order. If you need to communicate with the client about the order, you can add flags.

2. Review or take action on the order.

Processing Orders

To process a submitted or rejected (resubmitted) order, all flags must be accepted. See "Accepting Flags" on page 6-5.

To process an order:

1. In the action column for the desired submitted or rejected order, click the word **Process**.
   The order is displayed.
2. Accept all flags.

Note: Each flag must be accepted individually.

The Process Order button becomes active.

3. Click **Process Order**.
   The order is moved to the next processing level and displayed in the appropriate summary table.

Flagging and Rejecting Orders

When publishers want to reject an order, it is customary to add a flag to the order to tell the CMR why it is being rejected. The CMR can then take action, address the flag, edit the order, and resubmit it to the publisher. At this point the order becomes "submitted" again and the publisher can choose to accept the flags and then reject or accept the flags and process the order. The instructions for accepting a flag are described in "Adding Flags to Orders" on page 6-4. Instructions on rejecting submitted orders are described in "Rejecting Orders" on page 6-5.

Adding Flags to Orders

Flags provide warnings or comments made by either the Publisher or the CMR. These flags must be accepted (resolved) by the publisher before processing an order.

To add flags to orders:

1. In the action column for the desired order, click the word **Process**, if available.

   The order is displayed.

2. Click the Order number, Heading, or AdCode you wish to flag.

   The flag comments box appears.

3. Enter the desired criteria.

   You can enter a comment in the text box. If you wish the comment to be private, check the private flag box.

4. Click **Add Flag**.

Flags are displayed in the summary table as follows:

Flag	Description
	Comment Flag
	Private Comment Flag
	Accepted Flag

Rejecting Orders

If you have not accepted all flags in the submitted order (submitted orders are listed in the submitted orders summary table), you must reject the order.

To reject an order:

1. In the action column for the desired submitted or rejected order, click the word **Process**.

   The order is displayed.

2. Do not accept the flags.

   You can accept some of the flags, but at least one must not be accepted to reject the order.

3. Click **Reject Order**.

   This order is placed in the Rejected orders summary table.

Accepting Flags

When flags have been added to submitted orders, you can accept the flags and then reject or accept the order. When flags have been added to rejected orders, you can accept the flags and then process the order. The instructions for accepting a flag are contained in this section. Instructions on rejecting submitted orders are described in "Rejecting Orders" on page 6-5. To process the order after accepting all flags see "Processing Orders" on page 6-3.

To accept the flag:

1. In the action column for the desired submitted or rejected order, click the word **Process**.

   The order is displayed.

2. Click the flag.

New information appears below the flagged entry.

3. Click Accept Flag.

Note: You must accept each flag individually.

Once all flags have been accepted you can process the order. See "Processing Orders" on page 6-3. If any flags have not been accepted, you must reject the order. See "Rejecting Orders" on page 6-5.

Invoices

Publishers can invoice their clients and manage the invoice process.

Viewing Invoices

You can view and print existing invoices.

To view invoices:

1. Click **Publisher Admin Tools** in the left navigation bar.
   The menu expands to reveal multiple options.
2. Click **Orders and Invoices**.
3. Click **Go to Invoices** in the bottom half of the screen.

The Invoices page is displayed. All invoices are provided in the summary table.

4. Click the ▼ to reveal the invoices for the desired client.
5. Click the Invoice number to display the actual invoice.

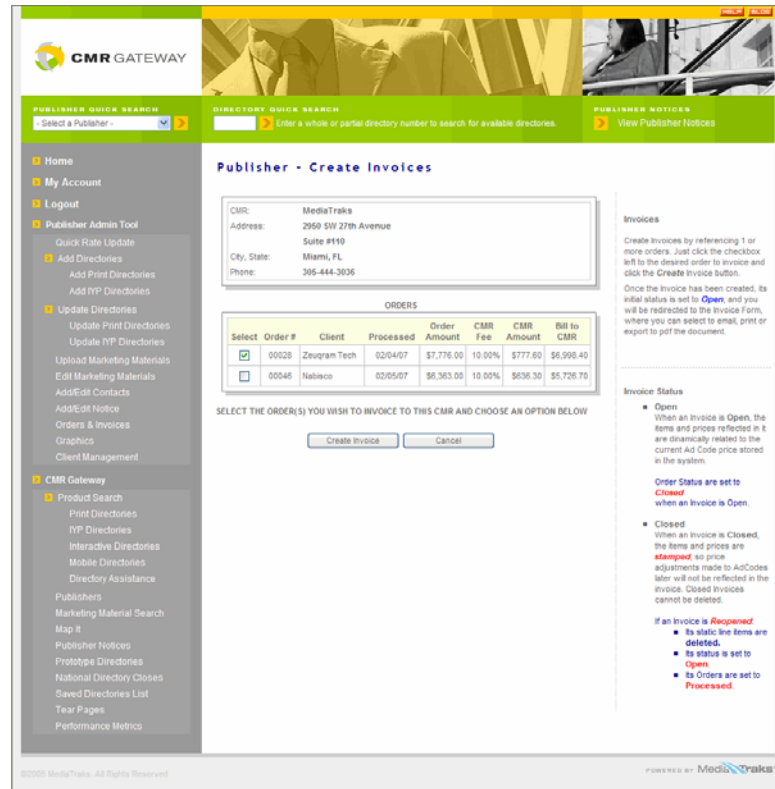You can print, e-mail, or save the invoice to a PDF file. You can also close or delete the invoice.

6. Click **Back to Invoices** to return to the invoice summary table.

Creating Invoices

You can create invoices to be sent to clients. Invoices can be created referencing one or more orders. Once the Invoice has been created, you will be redirected to the Invoice Form, where you can select to e-mail, print, or export the document to pdf.

To create invoices:

1. Click **Publisher Admin Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Orders and Invoices**.

3. Click **Go to Invoices** in the bottom half of the screen.

   The Invoices page is displayed. All invoices are provided in the summary table. For clients where an order has been placed, but no invoice has been created, the 💲 appears in the action column of the client.

4. Click the 💲 for the desired client.

The Create Invoice screen appears.

5.   Click the checkbox to the left of the desired order to invoice(s).

6.   Click the **Create Invoice** button.

The invoice is created and displayed. You can print, e-mail, or save the invoice to a PDF file.

7.   Click **Back to Invoices** to return to the invoice summary table.

Chapter 7: Finding Directories and Uploading Graphics

CMRs can search directories to locate prime listing opportunities for their clients. Publishers can search for their own directories to verify their availability.

Note: Once CMRs locate the desired directory for which they want to place an order, they can place that order from the directory's Directories Headings subtab. To start the order process, use the Headings subtab and the shopping cart. See "Creating and Submitting Orders" on page 8-1 for details.

Print Directories

The CMR Gateway offers multiple ways to search for directories. National closings for directories are listed in the in-line help area. Please note these notices as you are searching for directories.

To search for specific directories:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Product Search**.

   The menu expands to reveal multiple options.

3. Click **Print Directories**.

In This Chapter

- Print Directories
- IYP Directories
- Other Directory Types
- Publisher Details
- Uploading Graphics
- Other Directory Views
- MapIt

Finding Directories and Uploading Graphics

Print Directories search criteria boxes are displayed.
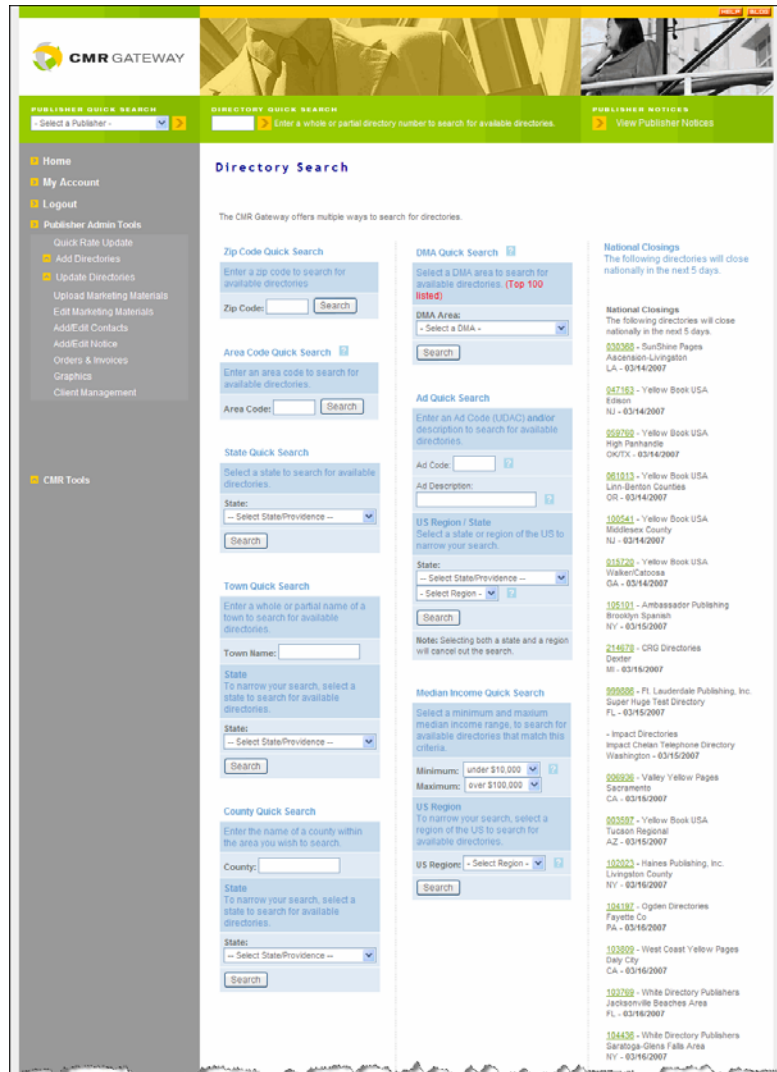
4. Enter the desired search criteria.

   Select one type of search and enter search criteria. The following search type boxes are available:

Search Box Type	Explanation
Zip Code	Search by ZIP code
DMA	Search by Designated Market Area ™
Area code	Search by area code
State	Search by state
Ad	Search by UDAC ad codes and descriptions
Town	Search by town
County	Search by county

5. Click **Search**.

The directories are displayed in summary tables for open and closed directories. You can click on the directory number to view details about the directory and publisher (see "Publisher Details" on page 7-5) as well as to upload graphics. See "Uploading Graphics" on page 7-8.
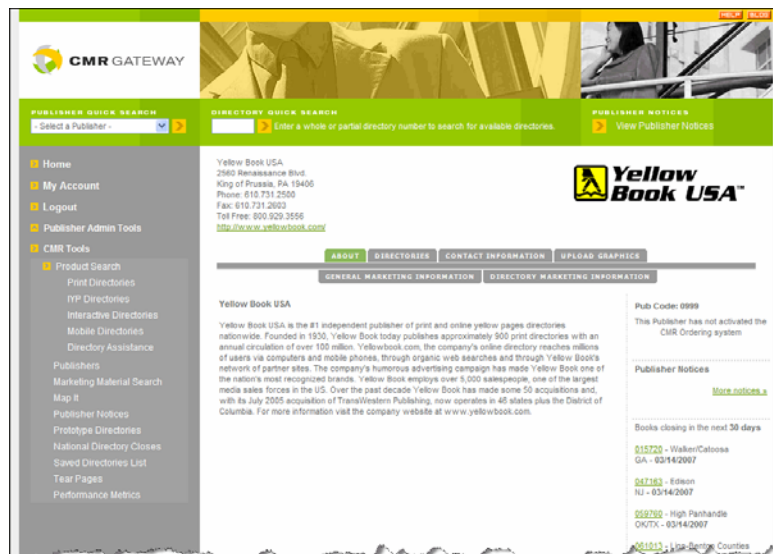
IYP Directories

You can search for Nationally Branded or Locally Branded IYP directories.

Nationally Branded

You can search specifically for Nationally branded IYP directories.

To search for nationally branded IYP directories:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Product Search**.

   The menu expands to reveal multiple options.

3. Click **IYP Directories**.

4. Click **Nationally Branded**.

   The IYP Search Results screen appears with all nationally branded directories listed in the table. You can narrow your search by entering search criteria provided to the right of the screen. You can click on the directory name to view details about the directory and publisher (see "Publisher Details" on page 7-5) as well as to upload graphics. See "Uploading Graphics" on page 7-8.

Locally Branded

You can search specifically for Locally branded IYP directories.

To search for locally branded IYP directories:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Product Search**.

   The menu expands to reveal multiple options.

3. Click **IYP Directories**.

4. Click **Locally Branded**.

5. Select the desired region.

   The IYP Search Results screen appears with all locally branded directories listed in the table. You can narrow your search by entering search criteria provided to the right of the screen. You can click on the directory name to view details about the directory and publisher (see "Publisher Details" on page 7-5) as well as to as well as to upload graphics. See "Uploading Graphics" on page 7-8.
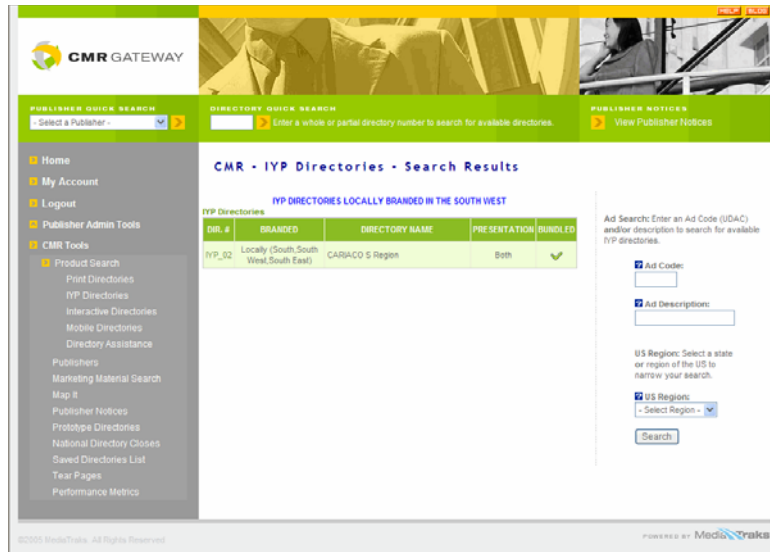
Other Directory Types

You can also search specifically for Interactive Directories, Mobile Directories, and Directory Assistance.

Publisher Details

Once you have located the desired directory in the summary tables you can click on its directory number to invoke the Directory Details screen. This screen provides details about the directory and the publisher as well as the ability to upload graphics. This section summarizes the information available about the directory and publisher. In addition, publisher notices and directory closings are available on the right side of the screen.

About

The About tab provides summary information about the publisher. You can also get to this tab via the Publishers link in the left navigation bar.

Finding Directories and Uploading Graphics

Directories

The Directories tab provides summary information about the directories provided by the publisher. Individual directory level detail is available by clicking the directory number in the directory summary tables.
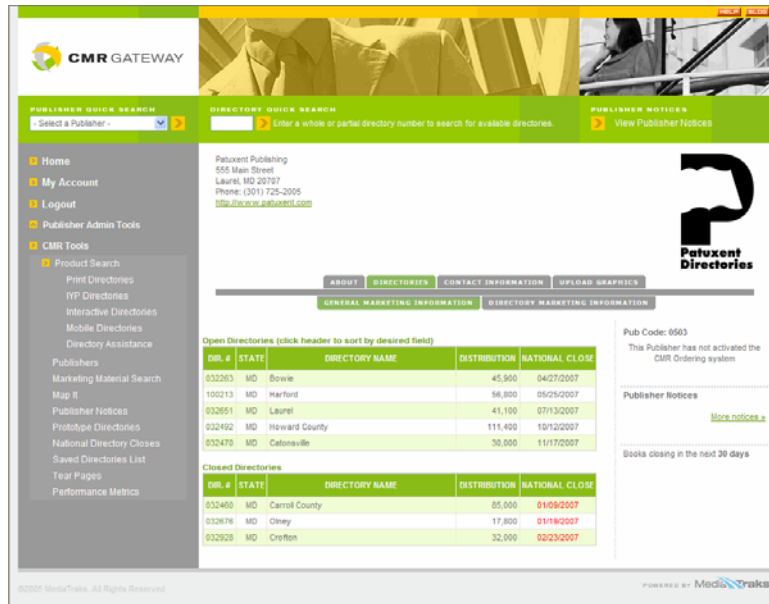
Once you have selected a directory, you are placed in the Directory level details subtab and you can save a directory to a search list by clicking **Save Directory to Search List**.
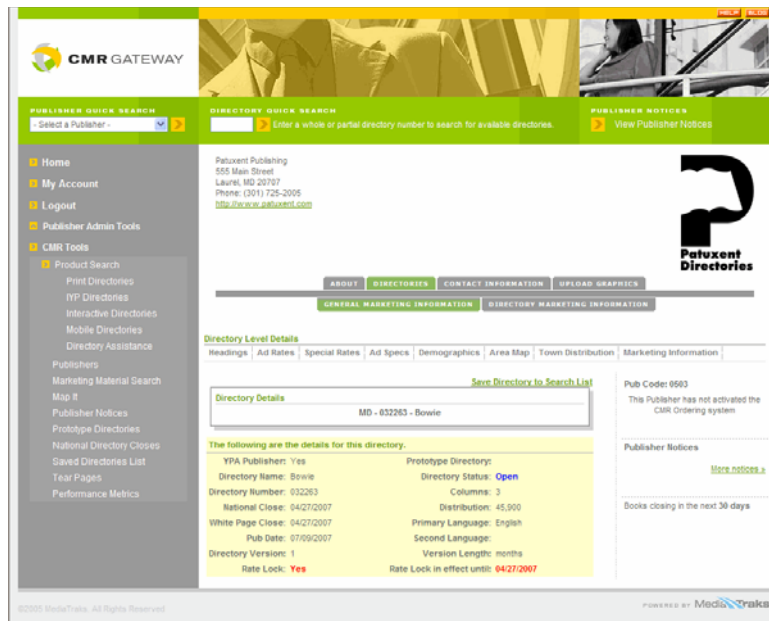
Note: CMRs use the subtabs in this tab to begin the order process. To start the order process, use the Headings subtab and the shopping cart. See "Creating and Submitting Orders" on page 8-1 for details.

Contact Information

The Contact Information tab provides general contact information for the publisher.
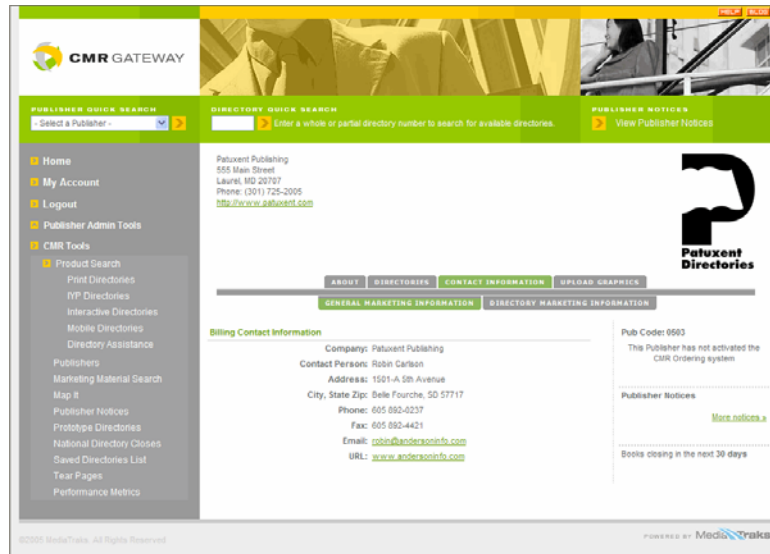
General Marketing Materials

The General Marketing Materials tab provides access to marketing materials about the publisher, not to a specific directory. You can also get to this tab via the Marketing Materials Search link in the left navigation bar.

Directory Marketing Materials

The Directory Marketing Materials tab provides access to marketing materials about a specific directory. You can also get to this tab via the Marketing Materials Search link in the left navigation bar.
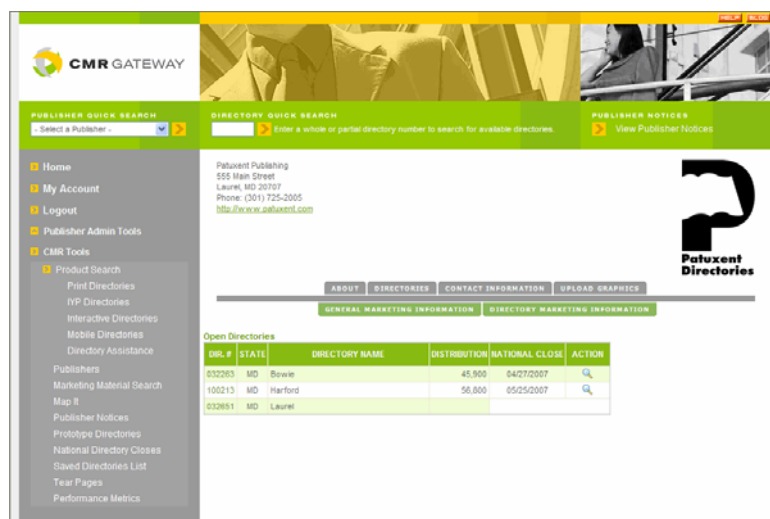
Uploading Graphics

Once CMRs have located the desired directory in the summary tables, they can click on its directory number to invoke the Directory Details screen. This screen provides details about the directory and the publisher as well as the ability to upload graphics. This section summarizes the method for uploading graphics for the specified directory and a specified order.

Note: Most graphics formats are accepted.

To upload graphics from the directory details tab:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Product Search**.

   The menu expands to reveal multiple options.

3. Click the desired directory type.

4. Locate the desired directory and click its directory number in the summary table.

5. Click the **Upload Graphics** tab.

   Upload graphics options appear.
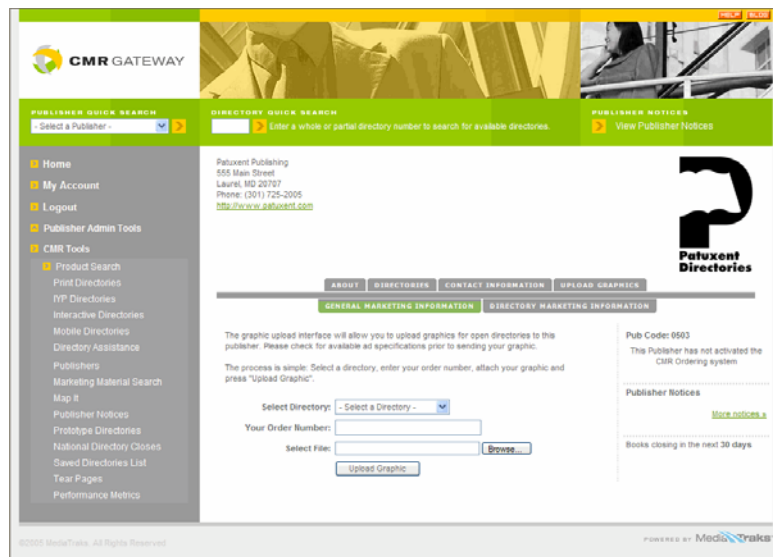
6. Select the desired directory name from the list.

7. Enter the order number in your order file.

8. Use the **Browse** button to locate the desired graphics file.

9. Click **Upload Graphic**.

Other Directory Views

In addition to Searching directories, see "Print Directories" on page 7-1, and quick information about directories, "Quick Information Bar" on page 2-4, you can view

Prototype Directories, see a list of National Directory Closes, and view a list of directories you saved with a click on these features in CMR Tools.

MapIt

The CMR Gateway allows you to view a map of the area a particular directory serves.

To view directory maps:

1. Click **CMR Tools** in the left navigation bar.

    The menu expands to reveal multiple options.

2. Click **MapIt**.

    The Left Navigation bar is repopulated with search criteria and the Display area is populated with a global map.
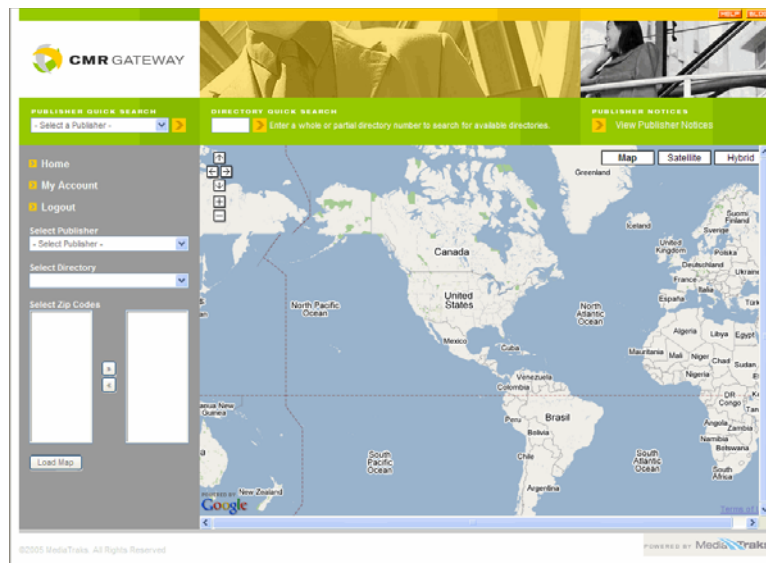
3. Select the name of the publisher, the directory, and enter the desired zip codes.

4. Click **Load Map**.

    The Display area is populated with the specific map requested.

    You can return to the default left navigation bar by selecting **Home**.

Chapter 8: Performance Metrics

The CMR Gateway allows you to evaluate the performance of listings in directories. You can run a variety of marketing and financial reports to assist in your evaluation of ad placement. This feature is currently available for demonstration.

To access performance metrics:

1. Click **CMR Tools** in the left navigation bar.

   The menu expands to reveal multiple options.

2. Click **Performance Metrics**.

3. Select the desired marketing or financial report link.

4. Enter the desired criteria.

5. Click **Run Report**.

   The report is displayed.

Marketing Reports

There are currently three types of reports that can help you evaluate your marketing success.

Report Name	Function
Calls by Directory and Heading Report	Generates a report that lists calls received by directory and heading.
Zip Code Report	Generates a report that lists calls received by zip code.
UDAC Report	Generates a report that lists calls received by UDAC codes.

The following example is a Zip Code Report.
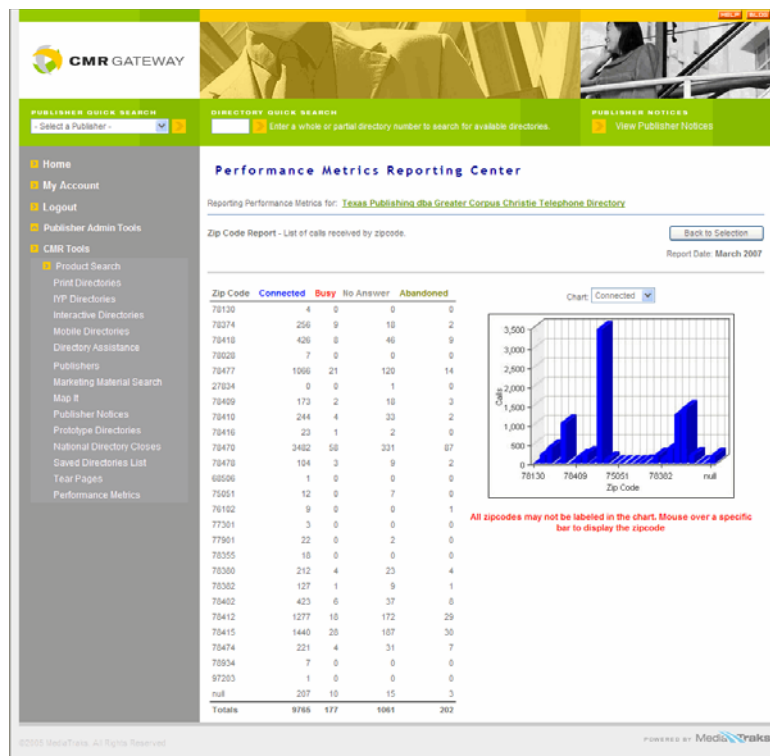
Financial Reports

You can run a financial report to evaluate the cost per lead based on calls received.

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