CONVERTR CERTIFICATION

The Convertr Certification Course for Publishers

Convertr

Welcome to the Convertr Certification Course for Publishers.

This document has EVERYTHING you need to know about using the Convertr Platform, from uploading leads and personalising your account, to delivering campaigns with consistent best practice techniques.

This guide will help you to deliver leads on time, accurately and to the highest standard.

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FOUNDATION PHASE

Getting Started with Convertr

To make sure you get the most out of Convertr, you need to make sure your account is set-up correctly from the start.

This foundation section will help you to get started with your account, familiarise yourself with the platform and set-up your preferences for reporting.

At the end of this section, you'll be able to set-up your account with best practices – so you're ready to deliver your first campaign.

Activating Your Account

Who creates my account?

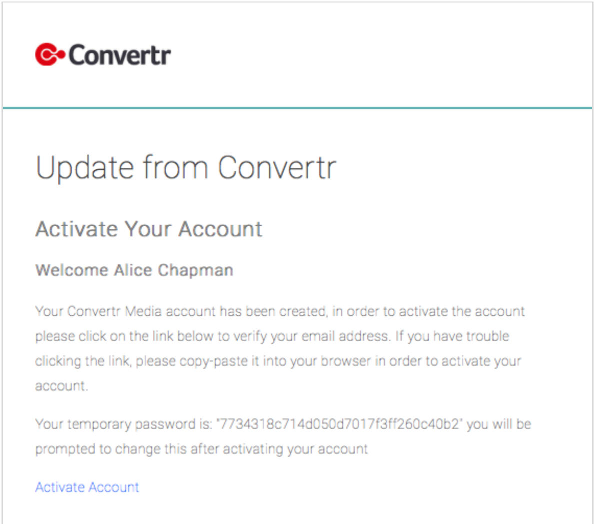
Your Agency/Client will create your publisher account; this is specific to each individual publisher user.

When will I get a Convertr account?

You should expect your account to be created when you are assigned to your first campaign.

How do I activate my account?

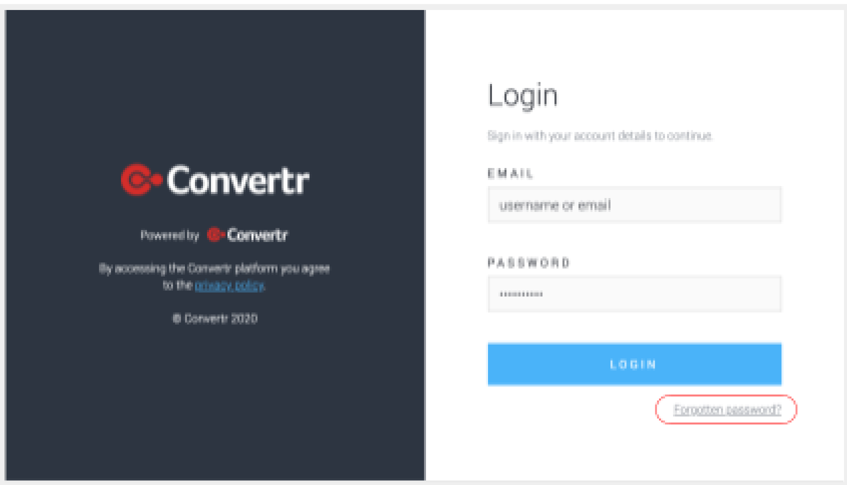
You will receive your login details via email, follow the email instructions to activate your account. An example account activation email is shown on the right.



Welcome Email

Lost or Forgotten Login Details

If you have lost or forgotten your login details, you can use the ‘Forgotten Password’ button on the login screen to reset your password. You can use your username or your email address.

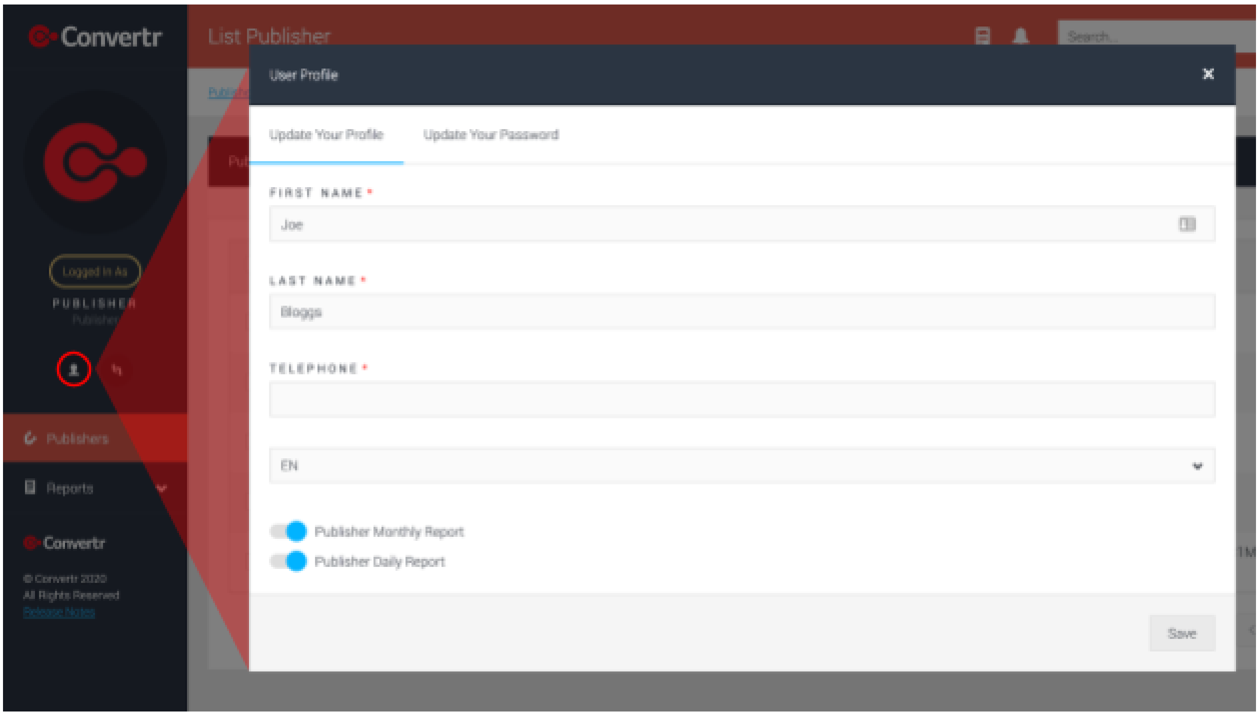


Login to The Platform

Login regularly to keep up to date with:

- Your campaign progress and performance
- Reasons for invalid leads
- Filters/Rules applied to the campaign(s)
- Previous campaigns
- Available campaigns
- Updating your details and reporting frequency
- Changing your password

Select the Profile icon to view your profile page.



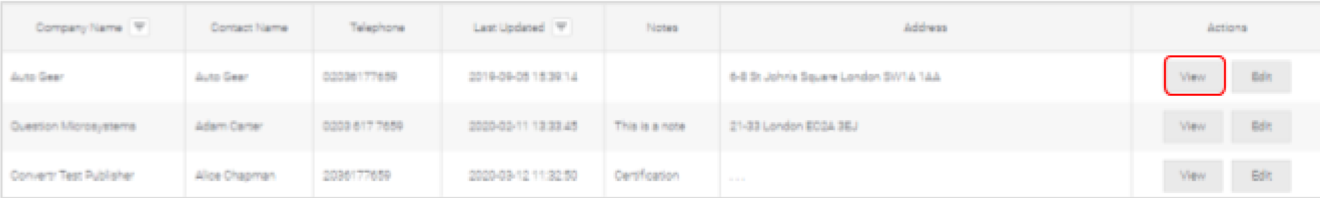
Best Practice: Login Details

Make sure to use a secure password and ensure all details are kept up to date.

Working with Multiple Publishers on One User Account

Within the platform, it is possible to have multiple publishers assigned to one user account.

If you are assigned to multiple publishers, you will need to select 'View' next to the publisher account to view the campaign details that this publisher is assigned to.

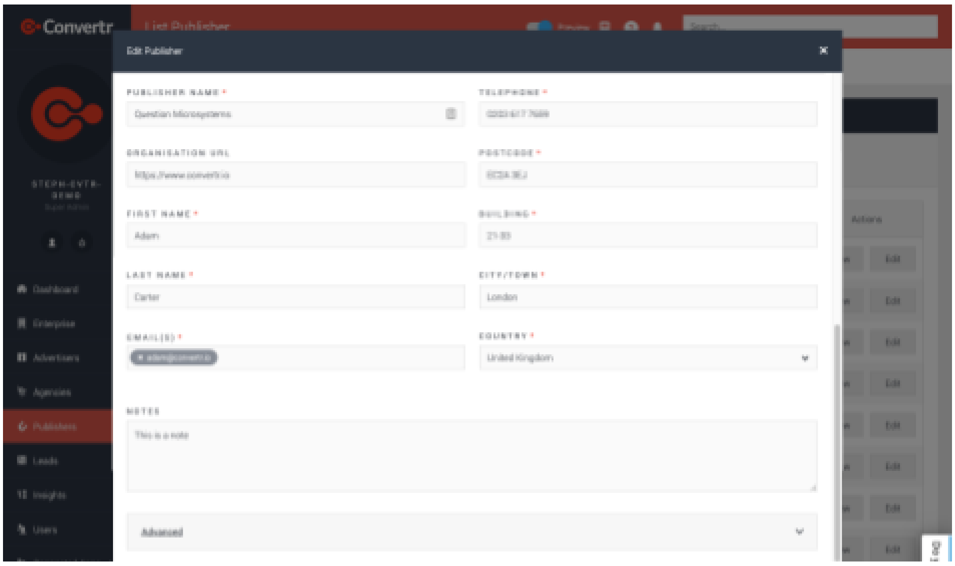


Company Name	Contact Name	Telephone	Last Updated	Notes	Address	Actions
Auto Gear	Auto Gear	02036177659	2019-09-05 15:39:14		6-8 St Johns Square London SW1A 1AA	View Edit
Question Microsystems	Adam Carter	0203 617 7659	2020-02-11 13:33:45	This is a note	21-33 London EC2A 3EJ	View Edit
Convertr Test Publisher	Alice Chapman	2036177659	2020-03-12 11:32:50	Certification	...	View Edit

Updating Your Publisher Details

Unlike your login details, your publisher details contain all the information associated with your user account. This includes key information such as email and contact details, so please ensure your communication details are always up to date.

To update your details, click Edit next to the chosen publisher, enter your details and select Save.

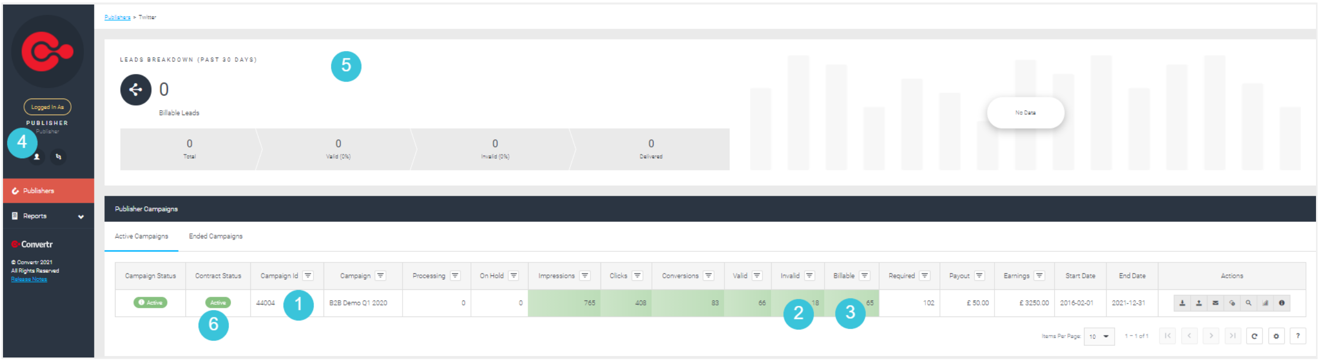


Best Practice: Updating Publisher Details

Your login details are essential for account access and receiving updates and information from the platform – so check all details are kept up to date to avoid missing out on important communications.

Understanding the Main Dashboard

This is the first thing you see when you log-in: it's a high-level overview of all your current campaigns, delivery status, campaign filters, reports and more:



1. **Campaign ID**: This unique value allows everyone to identify the campaign. Using this number will help you and the client find the right campaign quickly and accurately.

2. **Invalid**: The number of invalid leads on that campaign.
   TOP TIP – Use our invalid lead report to find out exactly why the leads are invalid.

3. **Billable**: The number of leads that have been successfully validated by the platform and accepted by the client.

4. **Account Details**: Update all your personal account details, specify the frequency of reports and add a profile picture!

5. **Leads Breakdown**: This will give you an overview of how you have performed across your campaigns within the last 30 days.

6. **Contract Status**: This will let you know if you have a current contract active on the campaign, without this you cannot upload!

Best Practice: Querying Leads

When querying leads that have been submitted to the platform, please use the Convertr Campaign ID and Lead ID as your points of reference. Personally Identifiable Information (PII) should not be sent over email.

Understanding Your Leads

Understanding the status of your leads is crucial to fully and successfully delivering a campaign.

Valid	Invalid	Billable	Required
66	18	65	102

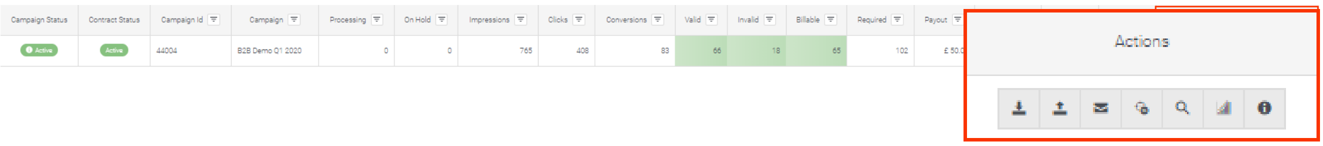
Below is a guide to the different lead statuses on the platform:

- **Valid Lead:** A valid lead has passed all Quality Assurance (QA) checks assigned to the campaign.
- **Invalid Lead:** These leads have failed a QA check(s); these will need to be reviewed by the client, then flagged as either valid or invalid after review.
- **Billable lead:** Billable leads are the leads that have successfully passed all the QA checks and have been delivered to the endpoint.
- **Payout:** The Cost Per Lead (CPL) for billable leads.

Actions on Current Campaigns

The 'Actions' column is one of the most important areas of the platform for anyone using a Publisher account: It's your go-to place to perform essential tasks or actions on a specific campaign.

To find the Actions column, go to your Dashboard and select the publisher account you want to work on. You'll see the Actions column on the right-hand side of the Current Campaigns dashboard:

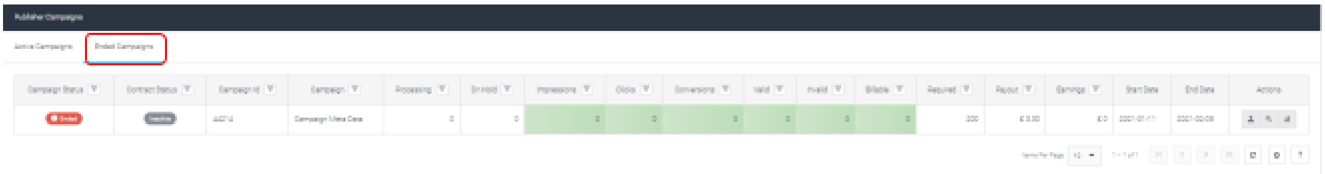


Import leads	View tracking links, impression tracker and API details
Export leads	View your contract history
Resend campaign assets	Download your campaign performance report
View the Rules and Filters applied to the campaign	

Accessing Previous Campaigns

The ability to access previous campaigns lets you review past progress, see past campaigns, view previous contracts and report on the campaigns.

To view your previous campaigns simply select the ‘Ended Campaigns’ tab:

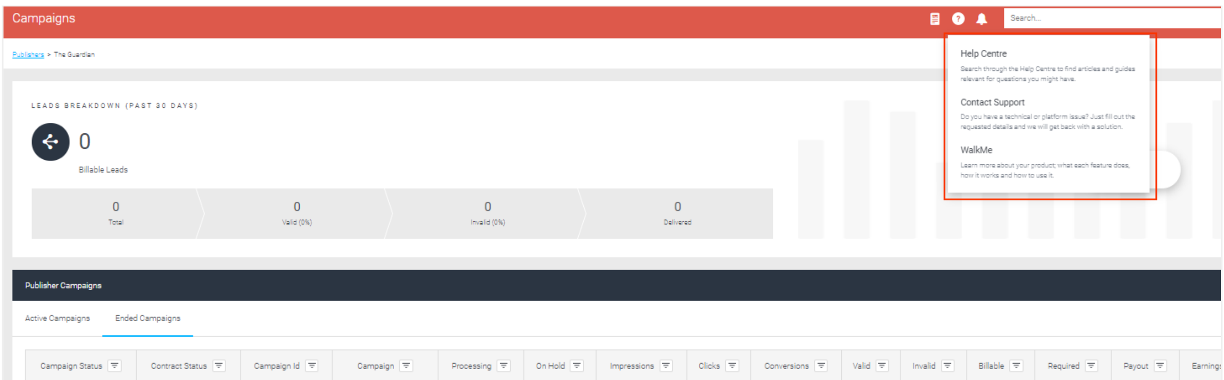


Using Platform Walkthroughs

If you’re new to Convertr, following our readily available walkthroughs is a great way to find your way around and familiarise yourself with the key features of the platform.

Guide to Walkthroughs

When you log-into the platform for the first time, at the top of the platform you will see our support options. This includes our Help Centre, and our in-platform walkthroughs (known as WalkMe).



Within our Help Centre you can find documentation on various areas of the platform, and our WalkMe functionality will offer a step-by-step guide within the platform on how to complete various tasks.

Best Practice: Walkthroughs

The walkthroughs are the easiest and fastest way for beginners to get to know Convertr. They’ll appear throughout the platform the first time you start using it, so keep an eye out for the icon to appear.

Scheduling Automatic Reports

When you first log-in, you can configure the platform to send you campaign summary reports automatically. These reports also include the invalid leads and the reasons why they were flagged as invalid.

This is extremely helpful for keeping on top of your campaign and routinely demonstrating your results to clients as it progresses.

How will I know when my report is ready to download?

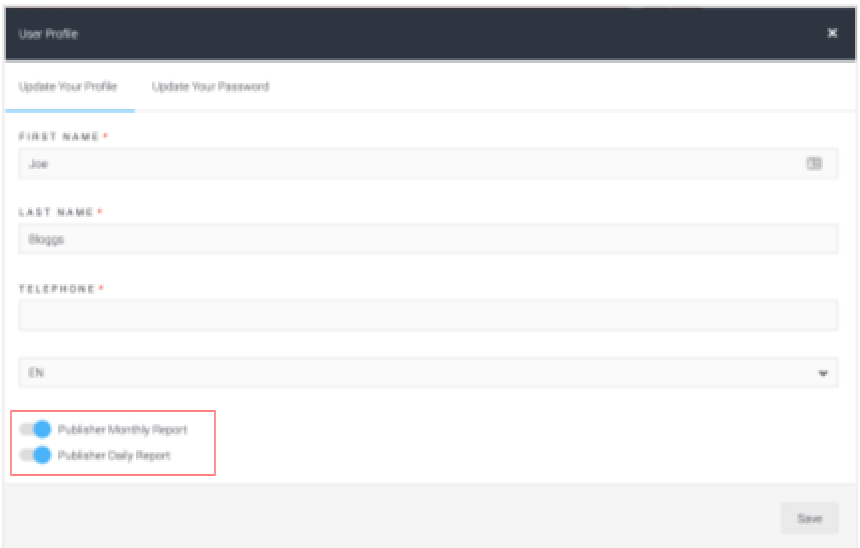
Depending on how you set your preferences, the platform will automatically create this report daily or monthly. You'll also receive a helpful notification email when your report is ready to download from the platform.

Scheduling Automatic Campaign Reports and Invalid Lead Reports

To schedule these reports simply:

1. Select the 'User Profile' icon on the left hand sidebar.

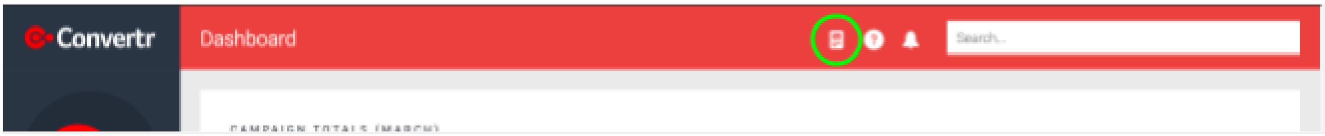
2. Within the User Profile section, select the toggle next to report frequencies that you want, then click 'Save'.



The Exports Button

The Exports button is a quick way to see all the Lead Exports and Campaign Performance Reports you have already downloaded, or which are new and awaiting download.

You can find Exports button at the top of every page:



Review: Getting Started with Convertr

You should now be able to:

- Log-in to the platform
- Update your account details
- Set-up your account to schedule automatic campaign reports
- Set-up your account to schedule automatic invalid lead reports
- Use Convertr Lead ID numbers as the safe and accurate way of referring to specific leads on the platform
- Support your training with platform walkthroughs
- Use the ‘Exports’ button to quickly access downloads

PHASE ONE

Campaign Rules and Assets

Once you're ready to start working on campaigns, the first step is understanding the instructions the client has given you.

Fortunately, Convertr has all these instructions and assets available in one place. With the Campaign Rules tool, you'll have clear, definitive guidelines on what the client needs from you and the criteria you need to meet so you can deliver a successful campaign faster and more accurately.

Campaign Information

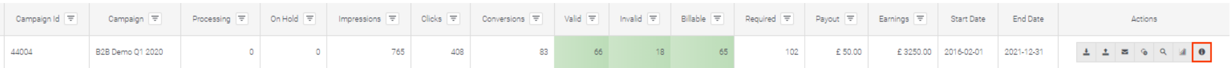
Convertr's Campaign Information allows you to see any validation or suppression rules that are applied to the campaign by the client. Getting familiar with the rules at the start of each new campaign is key to delivering a campaign successfully.

Best Practice: Checking Campaign Rules

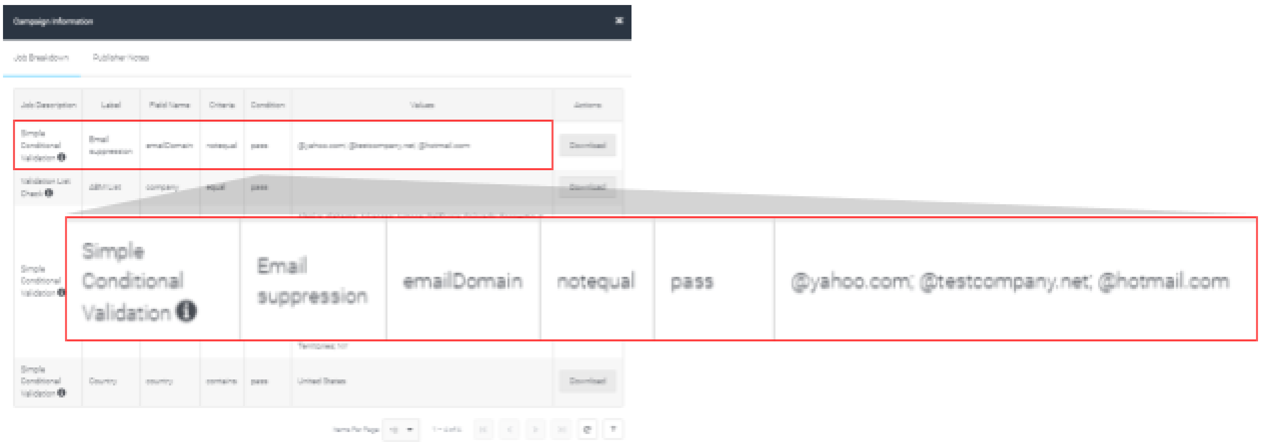
Even if you've worked with the client before, check the campaign rules again as they may have updated the rules or added a suppression list in accordance with compliance regulation or a data owner's request.

Guide to Campaign Rules

1. Login to the platform using your login details
2. Select' View' next to the relevant publisher and click the Campaign Information icon in the Action Column.

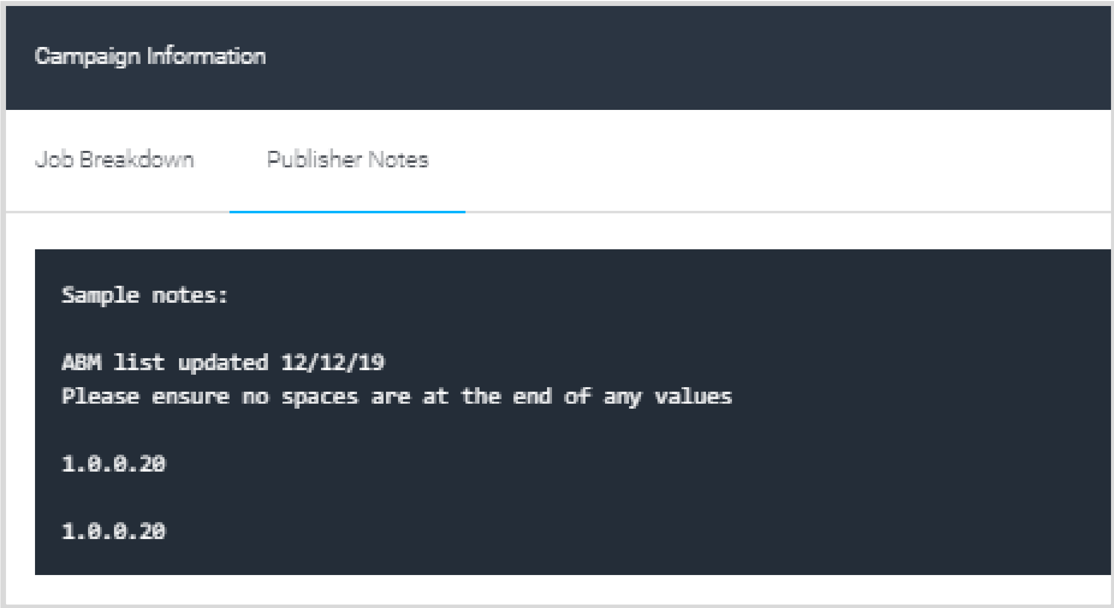


3. The first tab, Job Breakdown, shows you all Validation List and Simple Conditional Validations that have been applied to the campaign. These operate in a similar way, where you need to make sure you're meeting the condition set out in each row:



For Simple Conditional Validation, the values being checked will be available in the table, as well as to download. Validation List values can only be obtained via download. In all cases, you can see the list the values apply to, and what will happen if the condition is met.

4. The second tab, 'Publisher Notes' shows you any notes left by the campaign manager. This can include any vital information regarding updates to the campaign or any other pertinent information.



Campaign Assets

Campaign Assets are all the creative and media resources that a client has given you in association with a campaign (e.g. Landing Pages, Email communications, Forms etc.).

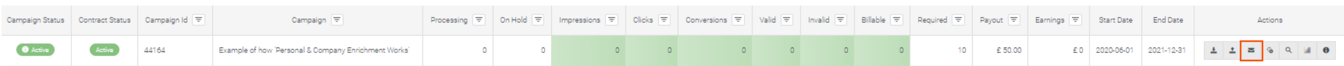
If a client is providing you with Campaign Assets to help deliver a campaign, the platform will automatically email the assets in a Media Kit. You should expect this as soon as the relevant campaign contract is signed.

Resending Campaign Assets

If you ever need to resend these assets, you can email a copy of the Media Kit directly from the campaign's Actions Column.

To receive the Campaign Assets again, all you need to do is:

1. Select the envelope icon from the Actions Column



Campaign Status	Contract Status	Campaign Id	Campaign	Processing	On Hold	Impressions	Clicks	Conversions	Valid	Invalid	Billable	Required	Payout	Earnings	Start Date	End Date	Actions
Active	Active	44164	Example of how 'Personal & Company Enrichment Works'	0	0	0	0	0	0	0	0	10	£ 50.00	£ 0	2020-06-01	2021-12-31	

2. Confirm that you would like to resend assets

3. The assets will then be sent to your email address.

Review: Campaign Rules and Assets

You should now know:

- That Campaign Rules should be checked before beginning any campaign
- Where to find Campaign Rules
- How to regulate your campaign delivery using Campaign Rules

PHASE TWO

Importing Leads

Importing leads to the Convertr Platform is easy, efficient and reduces the need for manual processes when delivering leads to clients. By using one of our automated processes shown in this section, you will also benefit from:

- Significantly faster lead delivery times
- An easier process for delivering leads
- Fewer mistakes and human errors to correct
- Fewer manual tasks and more resources saved
- Better client relationships

This section will take you through the options that are available to you, their requirements and the pros and cons of each method.

Methods for Importing Leads

The versatility of the Convertr platform allows you to use several methods to submit leads into the platform. However, to help you meet deadlines, deliver valid leads and reduce the risk of mistakes, it is important that you follow the best practices below.

Best Practice: Choosing the best method for Importing Leads

While Convertr has a range of methods available, it's important to use the method that's best for you and your clients.

PLEASE NOTE: Most of our clients require all publishers who wish to work with them to use an automated method (for more information, see Automating the Way You Supply and Deliver Leads).

Method	Requirements	Pros/Cons
Manual Import	• None	✔ Most basic method ✗ Requires manual work ✗ Prone to mistakes
API Integration	• One-off, light Development work to set up	✔ Easy ✔ Favoured by clients ✔ Easy to trace lead source ✔ Saves time ✗ Requires some internal set up
Convertr Forms (typically for B2C clients)	• A form to receive leads (on a website or call centre) • An Iframe to be placed over your current forms • An Iframe tag from the client to add to your website	✓ Reduces mistakes at point of data capture ✔ Bonus option to use Convertr's on-form validation ✔ Easy to trace lead source ✔ Eliminates manual errors ✔ Saves time ✗ Requires some internal and client set-up

Manually Importing Leads

Leads can be uploaded using our 'Import Leads' function. This allows batches of leads to be uploaded to the campaign.

IMPORTANT: It is HIGHLY important to ensure that you learn the all best practices for importing leads. The full details can be found here, and below is a summary of these points:

Best Practice: Manually Importing Leads

1. Use the template from the platform
2. Ensure the country code is in brackets before the phone number
3. Remove any blank rows or columns
4. Check the Campaign Rules to ensure you have met all the requirements
5. Ensure you upload 1 (REAL) TEST LEAD before uploading all the leads to ensure that you are happy with the process and there are no issues with the excel file

PLEASE NOTE: Due to new data protections laws coming into effect from the 25th May 2018, more Convertr clients may enforce that leads be submitted via the Convertr publisher API.

Prerequisites

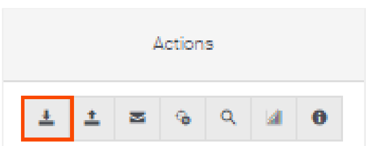
Please ensure that the following prerequisites are met when importing leads:

- You have user account login details
- You have reviewed the campaign rules before uploading
- The file format is CSV
- The file is clean with any blank cells or unwanted formatting removed.

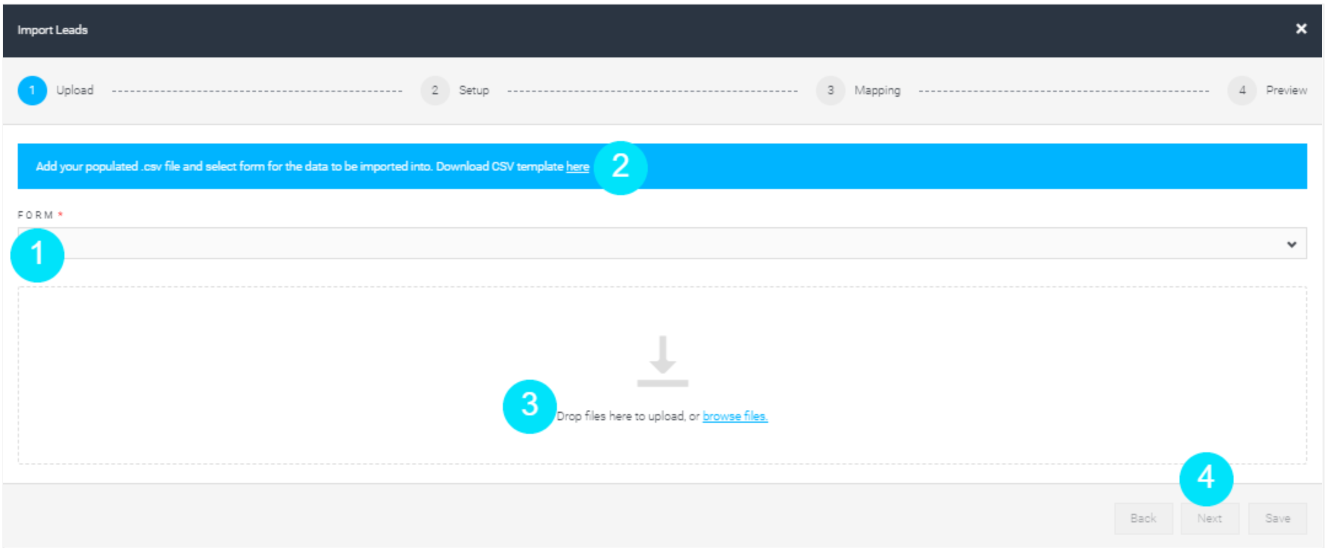
IMPORTANT: When uploading leads it is best practice to upload a maximum of 10 leads first. This is to ensure that the mapping and the leads are in the correct format, before uploading large batches of leads.

Where to Manually Import Leads

Login to the platform using your login details, select 'View' next to the relevant publisher, and click the import icon next to the campaign:

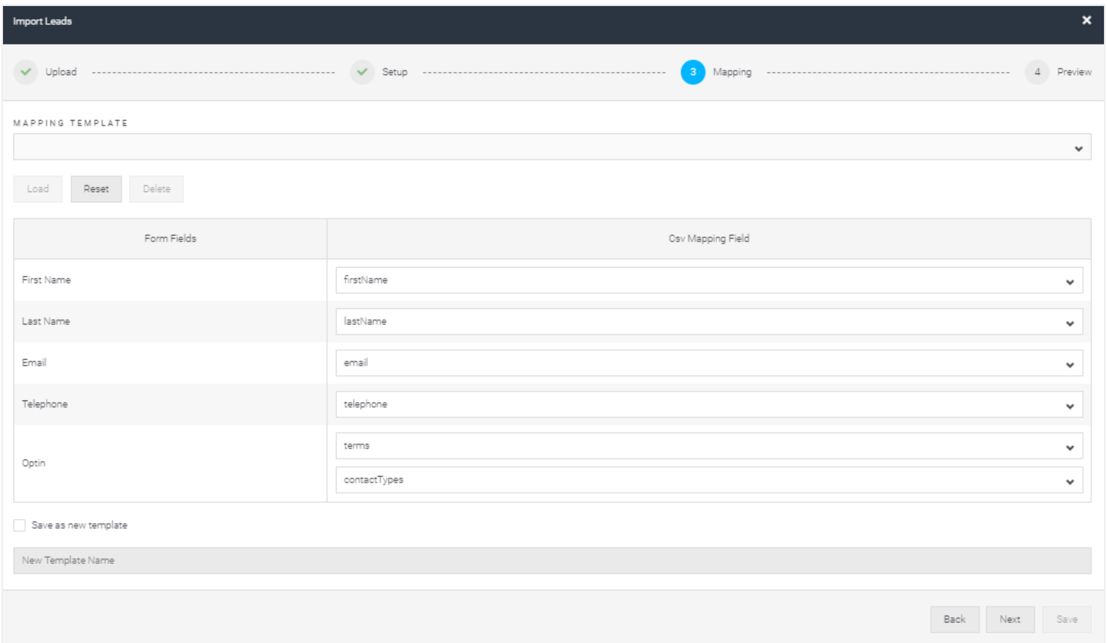


How to Manually Import Leads

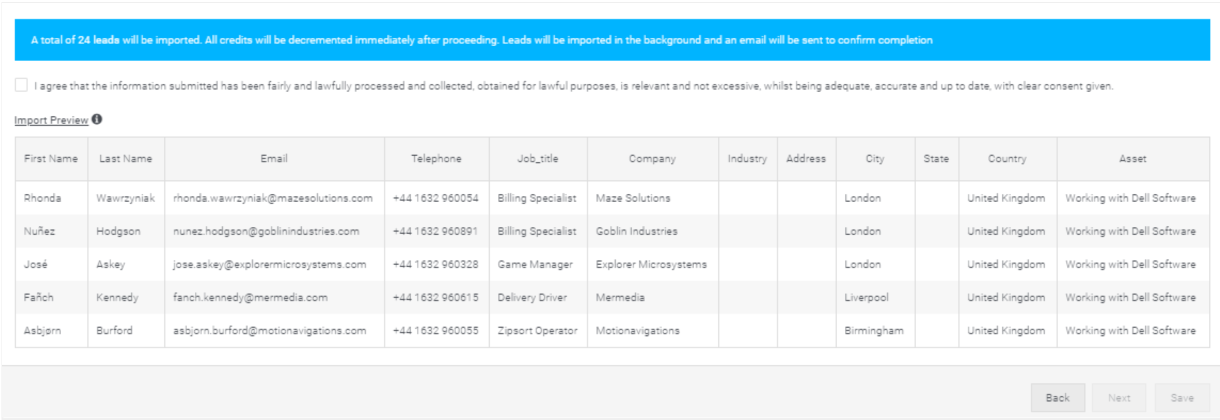


1. Use the dropdown to select the relevant campaign form
2. Download the CSV template and insert your lead details
3. Click and drag your CSV file into the drop zone or use select Browse Files' to search for your document
    a. To start the import:
    b. Click Next

Before you can start the import, you'll need to ensure that the fields are mapped correctly by clicking Preview Import to confirm that the field mapping is correct. An example shown below.



4. Once you've created the field mapping you need and checked that it is correct, select Next. If the mapping is not correct, select Back and edit the mapping of the fields again.


A total of 24 leads will be imported. All credits will be decremented immediately after proceeding. Leads will be imported in the background and an email will be sent to confirm completion

I agree that the information submitted has been fairly and lawfully processed and collected, obtained for lawful purposes, is relevant and not excessive, whilst being adequate, accurate and up to date, with clear consent given.

Import Preview

First Name	Last Name	Email	Telephone	Job_title	Company	Industry	Address	City	State	Country	Asset
Rhonda	Wawrzyniak	rhonda.wawrzyniak@mazesolutions.com	+44 1632 960054	Billing Specialist	Maze Solutions			London		United Kingdom	Working with Dell Software
Nuñez	Hodgson	nunez.hodgson@goblinindustries.com	+44 1632 960891	Billing Specialist	Goblin Industries			London		United Kingdom	Working with Dell Software
José	Askey	jose.askey@explorermicrosystems.com	+44 1632 960328	Game Manager	Explorer Microsystems			London		United Kingdom	Working with Dell Software
Fañch	Kennedy	fanch.kennedy@mermedia.com	+44 1632 960615	Delivery Driver	Mermedia			Liverpool		United Kingdom	Working with Dell Software
Asbjørn	Burford	asbjorn.burford@motionavigations.com	+44 1632 960055	Zipsort Operator	Motionavigations			Birmingham		United Kingdom	Working with Dell Software

Back Next Save

Best Practice: Checking your Import

To avoid mistakes, it's important that you always double-check the import before submitting your leads.

The following warning message may appear before your import begins: if you see this message it means that you are attempting to import more leads than you are allocated and that this import needs to be authorised by the campaign manager.

IMPORTANT: Please do not re-upload the same leads again whilst waiting for this approval.

You're trying to import 24 As this is above your allocation for this campaign (you need 0 valid leads to fulfill your allocation), it will need to be authorised by a campaign manager. Once confirmed your import will continue automatically.

Best Practice Checklist for Manually Importing Leads		
Check	**Method**	**Why**
Use Convertr's Campaign Template to import your leads	Click the 'Download CSV template' link at the top of the Import Leads box and use this format as the basis of your own list.	This will save you time when uploading the leads as the mapping will be automatically done by the platform
Format all phone numbers	Ensure that the country code is in brackets before the number, e..g. (+44)12345678, and that no other special characters are used.	This means that the platform can check the number against the correct database, otherwise the standard country for that campaign will be used, and this may not necessarily be the correct county.
Remove blank rows and columns:	Highlight all the blank rows and fields in the excel file and click 'Delete'	Any hidden spaces within the blank rows and columns will be seen by the platform and uploaded. Removing empty cells prevents this issue.
Check the Campaign Rules	Check the campaign rules under Dashboard > Actions> Campaign Rules	This will help ensure that the leads submitted to the platform pass all formatting and campaign data rules.
Submit a test before uploading	Submit at least 1 test lead to check the campaign rules fit the campaign	This is a final check to ensure that there are no issues: If there are issues, you can correct these before you inappropriately upload large qualities of personal data.

When the above best practices are followed, you should find that these steps help you to deliver your leads and fulfil your campaigns in a smooth and timely manner.

Automating the Way You Supply and Deliver Leads

As the demand generation industry matures, many publishers and clients are upgrading their data process and using automated methods to supply and deliver leads.

This means connecting your Convertr account directly to the data source or the point of data capture (such as an online form or in a call centre). With this method, there's no need to manually upload leads as the data flows directly from your source into the platform for processing.

Not only are automated methods more efficient and preferred by clients; the direct connection also prevents any external interference with personal data to create a safer, more secure and reliable system.

API Integrations

To create a faster, more effective process, an API connection can be set up between your system and the Convertr platform. This means that leads can be sent automatically - and in real-time - directly into the campaign.

To set this up please follow the instructions on our API Documentation, which can be found here.

Implementing Convertr Forms

Convertr Forms can be directly placed on your website by using an Iframe. As an added bonus, this method can also give you the opportunity to use our LIVE on-form validation feature (where applicable).

To implement our forms, you will need to place the form link within an Iframe tag on your website. You will need to contact your client to get the correct form link.

FAQ for Importing Leads

What do I do if I have an issue or any difficulties?

Please contact the campaign owner (agency or brand contact) as a first line of support. Following this, your client may escalate any more technical or higher issues directly to the Convertr team.

Any other platform-related issues can be reported via the Support functionality shown on Page 10.

Best Practice: Using Convertr Lead ID Numbers in your communications

As mentioned earlier, every lead on the Convertr platform has a unique Lead ID number alongside their details. You should only use the Lead ID when referencing individual leads with clients or colleagues. This includes reporting issues that involve specific leads.

IMPORTANT: Never use personal details such as name or email address to reference individual leads with your agency or other publishers.

Why are my leads being invalidated?

There are a few frequent invalidation reasons that can be easily avoided. We recommend you go through our best practice tips before the file upload and do the following:

- Make sure you upload the file to the correct live campaign
- Make sure you follow the lead template supplied
- Only upload .csv files
- Trim the .csv file to remove any spaces before or after the cell content
- Check the .csv file for blank rows
- Make sure the telephone number format is: [country code][space][number]
- Make sure you're using the correct predefined values from the drop-down list on the lead import template (see Campaign Rules to find the correct predefined values)

I'm worried about GDPR

The full Convertr platform has a range of tools available to help Publishers become more compliant with data regulations. Please see the 'Accountability, Contracts and GDPR' section of this document to find out more about how Convertr is helping clients with GDPR.

Review: Importing Leads

You should now know:

- What methods are available
- Why automation is recommended
- How to manually import leads safely and securely
- How to solve common errors when importing leads
- That you should only use the Convertr Lead ID when discussing individual leads

PHASE THREE

Exporting Leads & Understanding Invalid Leads

Using a safe and secure process is just as important when exporting leads as it is when you import leads.

In this section, you will learn how to export leads with best practice as well as understanding why any invalidated leads have been flagged as invalid.

Exporting Leads

This feature allows you to easily export any leads that you have submitted to the platform.

Best Practice: First steps for resolving invalid leads

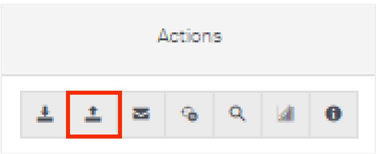
If any of your leads have been deemed as invalid when you report/export them, you should ensure that your report includes:

- The field's 'Id' (Convertr lead ID)
- 'QA Reason'
- 'Flag Reason'

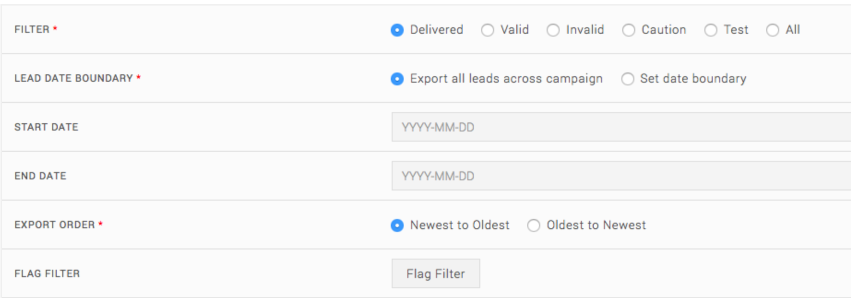
This will help your team to identify the lead quickly and understand why the leads have failed.

How to Export Leads

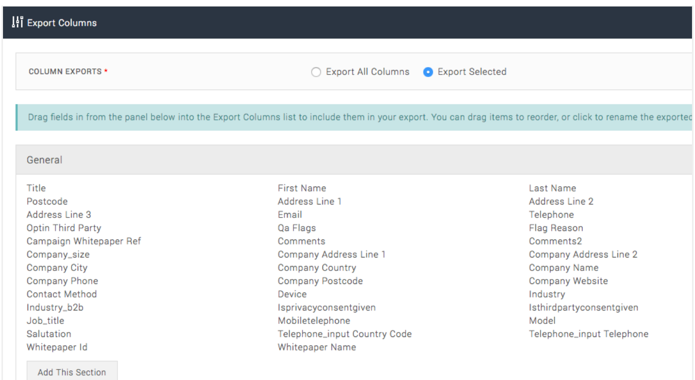
1. Login to the platform using your login details, select 'View' next to the relevant publisher, and click the export icon in the Actions Column.



2. Use the export filter to define the leads and date range you would like to export



3. You can export the columns you need by:
   a. Clicking 'All Columns' to create a more comprehensive report that includes all the columns available.
   b. Select only the specific lead columns you want to export. You can do this by clicking Export Selected and only choosing the fields you require



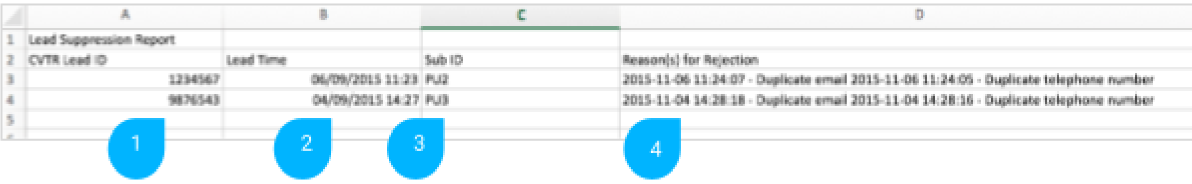
Invalid Lead Reports

The invalid leads report provides you with the reasons your leads have been invalidated by the platform and therefore rejected.

It is different from 'Lead Exports' as it only shows invalid leads: The full lead report can be downloaded from the notification centre on the platform (you'll learn more about this in the Reporting section of this Study Guide).

Below is a guide to the information you'll see on an invalid lead report.

Interpreting the Invalid Lead Report



	A	B	C	D
1	Lead Suppression Report			
2	CVTR Lead ID	Lead Time	Sub ID	Reason(s) for Rejection
3	1234567	06/09/2015 11:23	PU2	2015-11-06 11:24:07 - Duplicate email 2015-11-06 11:24:05 - Duplicate telephone number
4	9876543	04/09/2015 14:27	PU3	2015-11-04 14:28:18 - Duplicate email 2015-11-04 14:28:16 - Duplicate telephone number
5				

1 - CVTR Lead ID: This is the unique number given to each lead that is received into the Platform
2 - Lead Time: This is the time and date in which the lead was received into the platform
3 - Sub ID: This is a unique reference submitted by a publisher
4 - Reason(s) for Rejection: This outlines the reasons why the lead has failed

The Difference Between QA Reasons and Flag Reasons

There are two ways leads can be invalidated on the platform:

QA Reason

QA reason is short for 'Quality Assurance reason' – this means that the lead has failed to pass Quality Assurance checks in the platform, causing the lead to be automatically invalidated.

In this case, the Invalid Lead Report will show you which specific Quality Assurance check has caused this.

If you feel this lead should not be invalid, you should email the Agency following the best practices you learnt in the beginning of this section (The 'First steps for resolving invalid leads' guide). Remember, you should only use the Convertr Lead ID when discussing the lead with the agency

Flag Reason

The second reason a lead may be marked as invalid is because a user has manually flagged the lead as invalid during a secondary check. In this case, the Invalid Lead Report will show you the notes added by the user who flagged the lead as invalid.

Review: Exporting Leads & Understanding Invalid Leads

You should now know:

- How to export your leads
- How to create and customise an Invalid Lead Report
- How to identify the main reasons for invalidation
- What details you need to include when communicating invalid leads
- The difference between 'QA Reason' and 'Flag Reason'

PHASE FOUR

Accountability, Contracts & GDPR

Convertr is committed to helping all lead generation teams work more openly and effectively with our clients, publishers and partners across the world.

It's therefore especially important that you use this module to understand your responsibilities when working in the platform, as well as learning about the tools and features you can use to deliver campaigns with transparency and security.

Convertr's Accountability Confirmation

When using the platform, you may notice an 'Agreement' box, asking you to confirm an action you are about to take.

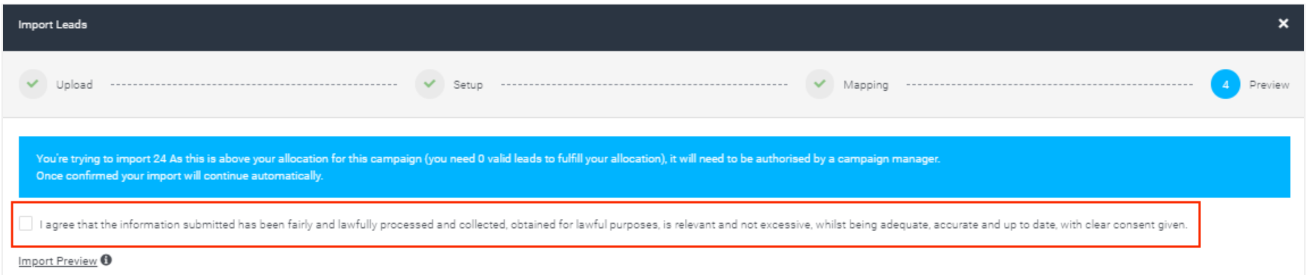
This is there to ensure that data has been:

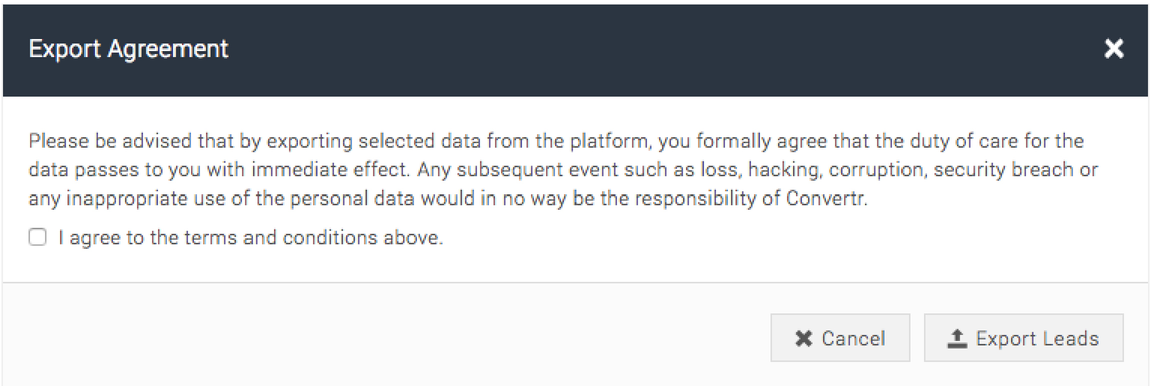
- Fairly and lawfully processed and collected
- Obtained for lawful purposes
- Is relevant and not excessive, whilst being adequate
- Accurate and up to date, with clear consent given

Accountability Checks on Lead Import and Export

When importing and exporting leads on the platform you will need to confirm that you have abided by the terms of the client and our Privacy Policy. This is extremely important to ensure compliance with the client's terms and conditions and the relevant rules and regulations (including GDPR).

You will not be able to upload leads without confirming this:





Contracts

When you are assigned to a campaign, you may be sent a ‘Contract’ by the platform. This ‘Contract’ confirms that you accept the Terms and Conditions given by the client, the number of leads to be delivered and at what CPL Rate.

Receiving your Contract

Once you are assigned onto a campaign, you will automatically receive an email from the platform with details and links to your contract. This will happen the first time you are assigned the campaign, and any time the contract is updated.

Below is an example of the email you will receive. Clicking the Sign Updated Agreement button will open a new page where you can review and sign the contract.

Convertr

Updated Lead Generation Campaign

Updated Lead Delivery Details

The **Details** on your agreement for the campaign **B2B Symantec Demo Q1 2018** has changed and you are required to sign a replacement agreement using the link below.

You can review the Convertr Publisher Services Agreement at any time using this link: http://convertrmedia.com/psa/

- You are required to sign the agreement within 48 hours or risk being removed from the campaign.
- If the link below doesn't work please copy and paste the URL into your browser: https://demo.cvtr.io/public/publisherContract/7c86379d3a9816f8e02a8da91bc8d7d9
- Keep this email in a safe place as you can review and download your agreement at any time using the below link.
- This is an automated message, if you wish to contact a campaign manager to discuss the details of your campaign, please call the number below or email adam.carter@convertrmedia.net

To sign the agreement, please follow the link below:

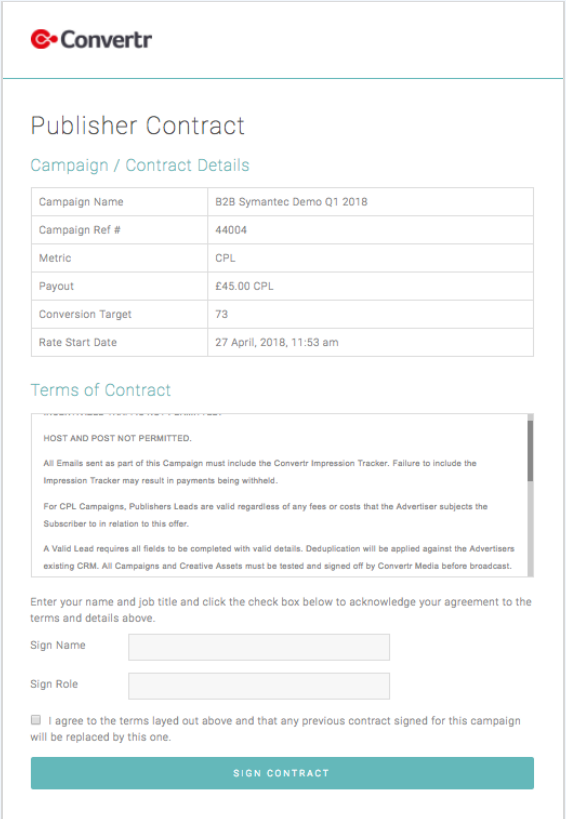
SIGN UPDATED AGREEMENT

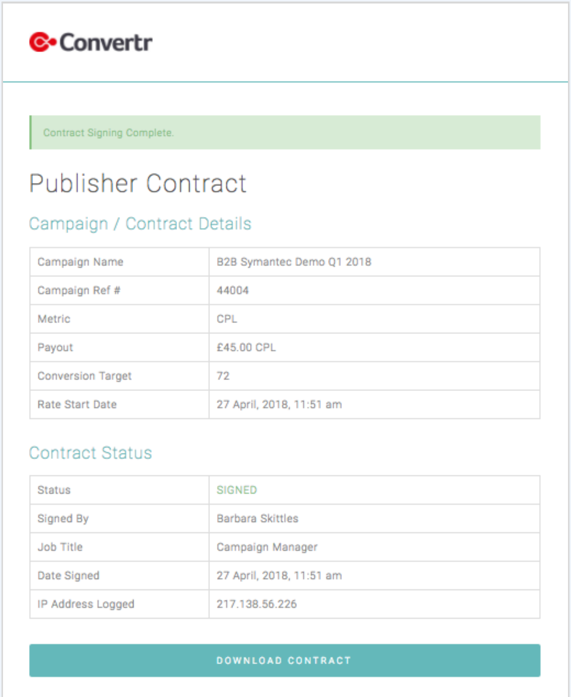
Signing your Contract

Once you've opened the link to your contract, signing your contract is straightforward:

Ensure you have fully read and understand the terms before you agree, then enter your name and job role in the available boxes. Only tick the agreement box if you agree to the terms and wish to proceed with the campaign.

View of an unsigned contract	View after contract has been signed





Once signed, the page will refresh to show the details of the agreement. You will also be able to download a copy of the agreement by clicking the Download Contract link at the end.

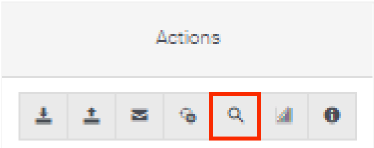
Best Practice: Downloading and Saving Contracts

A copy of this agreement will always be safely stored and recorded on the platform. However, we advise that you always download and safely store a copy in your own system as well. This is good organisational practice and will help provide you with a paper trail to reference if needed.

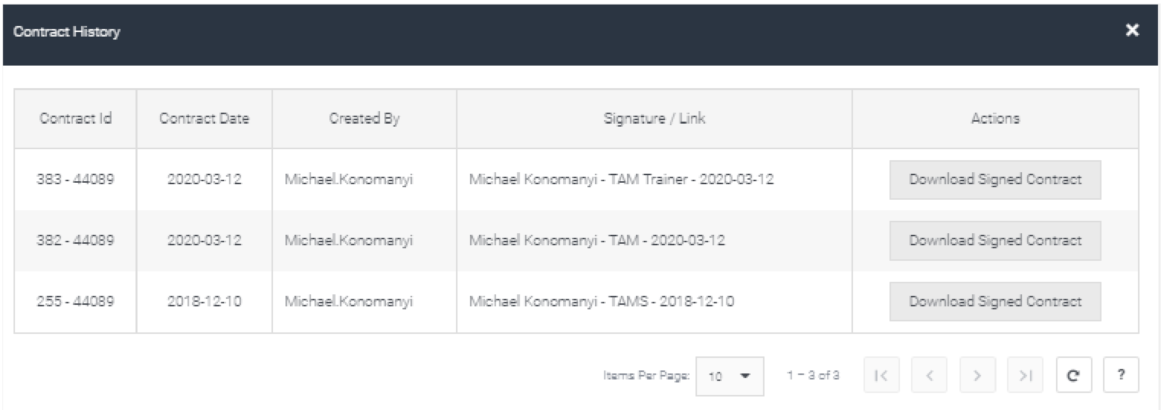
How to Access and View Your Contract History in the Platform

The platform stores and records all of these Contracts so you have full transparency on any changes made to them.

1. You can view your contract history for your campaigns by selecting the magnifying glass in the campaign's Actions Column.



2. From here you can review your contracts, see when they were signed, and download a copy whenever you need.



Contract History

Contract Id	Contract Date	Created By	Signature / Link	Actions
383 - 44089	2020-03-12	Michael.Konomanyi	Michael Konomanyi - TAM Trainer - 2020-03-12	Download Signed Contract
382 - 44089	2020-03-12	Michael.Konomanyi	Michael Konomanyi - TAM - 2020-03-12	Download Signed Contract
255 - 44089	2018-12-10	Michael.Konomanyi	Michael Konomanyi - TAMS - 2018-12-10	Download Signed Contract

Items Per Page: 10 1 – 3 of 3

Client Responsibilities – GDPR / Data Compliance

Convertr is committed to supporting upcoming changes to EU data protection law, and we expect all our users to share this responsibility. As Data Processors and Data Controllers are both equally responsible in ensuring GDPR compliance, we ask for your attention to address the following:

Including Convertr In Terms, Privacy and Cookie Policies

Ensure Convertr and our cookies are detailed in your relevant terms and conditions, privacy policy and cookie policy. You should be transparent as to what you're doing with the data and where the data is being sent – in most scenarios this is being sent outside of the EEA and needs to be stated as such.

Without modification the following cookies are implemented by Convertr and should be referenced where applicable. You should ensure that the Convertr opt-out page is also referenced within the same terms: https://{your-enterprise}.cvtr.io/cookies/optout

What it does	Duration	Mandatory
The PHPSESSIONID cookie is a mandatory cookie for the Convertr platform to operate. We use this cookie to give the user feedback messages around form errors and to temporarily persist application data to this user.	This cookie will last for a maximum of 24 hours or be automatically removed when you close your browser	Yes
The cvtr cookie is used to track which data source your click came from. We use this only to attribute your click & conversion to the correct data source within our platform for reporting.	30 days	No

Reviewing User Access

You should regularly review who has access to your Convertr instance and suspend access to users who no longer need it.

Review: Accountability, Contracts and GDPR

You should now know:

- Why you need confirm your agreement when importing and exporting data
- Where to find a copy of your campaign contracts
- Your responsibilities in helping to ensure compliance for yourself and the Client
- Why you need to update your cookie and privacy policies to include Convertr
- Best practice methods to follow when updating your policies
- That you should regularly review who has access to your Convertr instance

PHASE FIVE

Reporting Features

Keep clients happy and updated with clear, consistent reports on campaign results, as well as improving your own performance by seeing feedback on your lead-quality.

In the foundation section, you learnt how to set-up your reporting schedule before you deliver your first campaign. Once you're set-up with automated reports, this module will show you how to use the reporting tool to show overall performance as your campaigns progress.

Types of Reporting Methods

There are two ways to view and download performance reports in the platform:

In the Campaign Reporting Tab: This is a more flexible way of accessing reports in a live dashboard. It allows you to view your performance within a specific timeframe, and you have the option to view your performance in a single campaign, or across all campaigns.

In the Actions Column: Using the Campaign Performance Report tool is a quick way to download a report for a specific campaign.

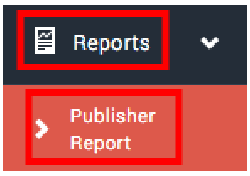
The Campaign Reporting Tab

The reporting tab allows you to view live updates and download statistics on how you are performing across all campaigns; as well as giving you the option to specify the timeframe and/or the particular campaign you want to report.

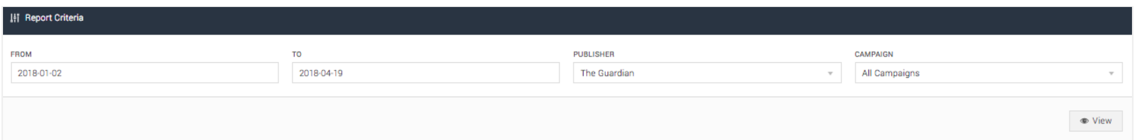
Viewing Reports in the Campaign Reporting Tab

You can view reports in the Campaign Reporting Tab by following the steps below.

1. Once you have logged onto the platform select Reports then Publisher Report in the left-hand menu.



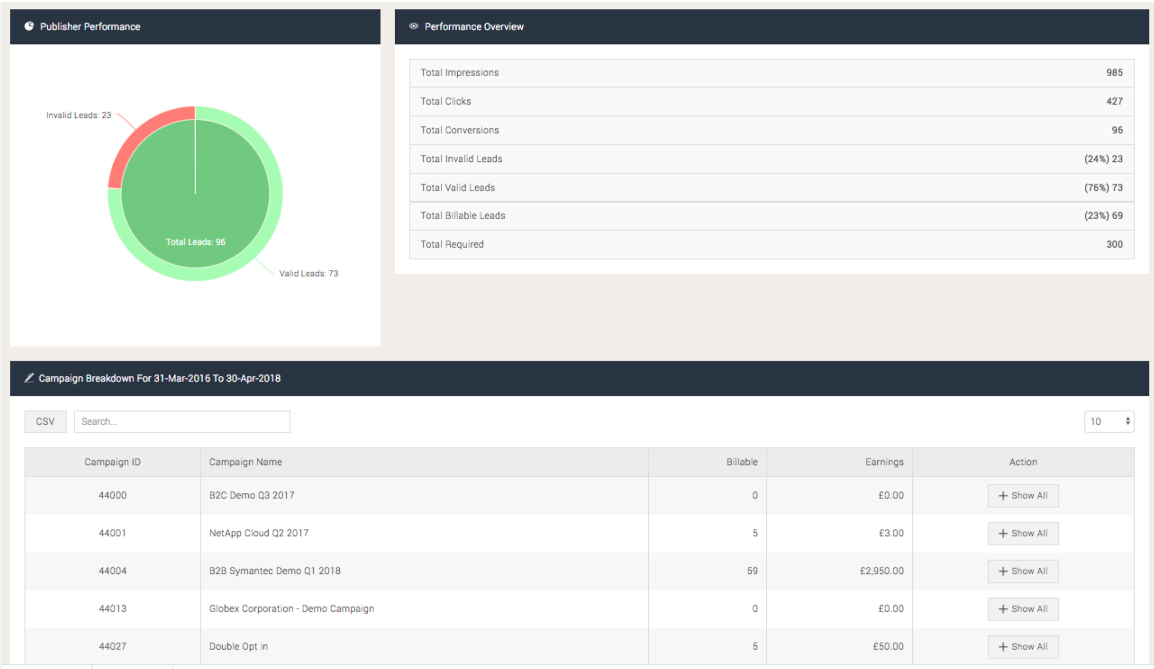
2. You will see the Report Criteria bar, as shown below:



3. Under Report Criteria, select your date range by clicking the 'From' and 'To' dates.

4. Next, select the campaign you would like to view or select 'All Campaigns' to view performance statistics across all your campaigns within the timeframe.

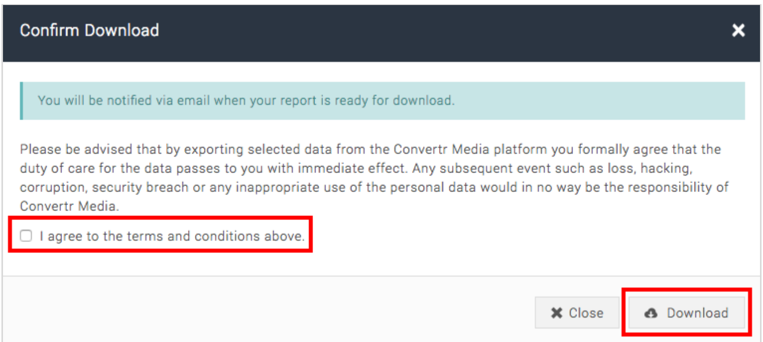
5. Once completed click 'View'. From this you will see your Publisher Performance, Performance Overview and Campaign Breakdown, as shown below:



Downloading Reports from the Campaign Reporting Tab

1. To download the report shown on the Campaign Reporting Tab, click the 'Download' button under the 'Report Criteria' section.

2. You will need to agree to the download terms and conditions to select 'Download'.

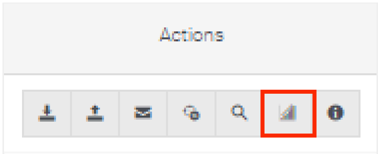


Reporting from the Campaign's Actions Column

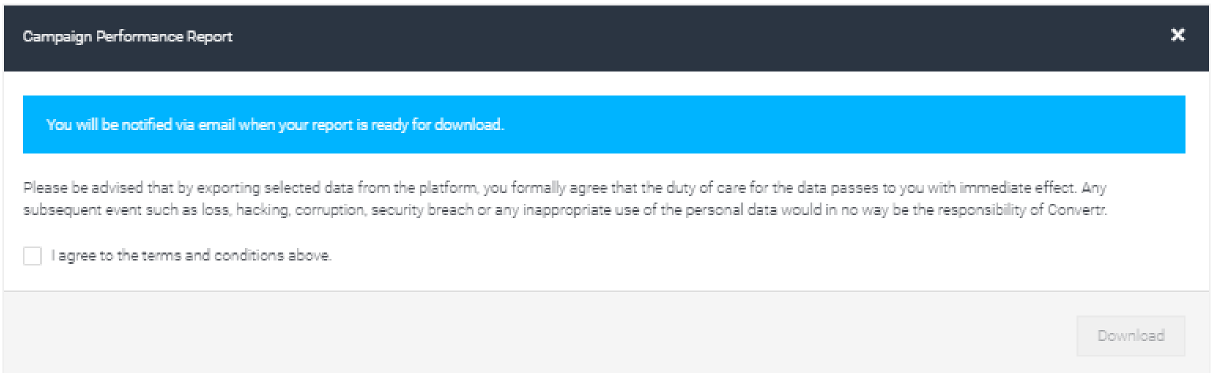
If you only want to see up-to-date information on a specific campaign, a quick and easy method is to use the Campaign Performance Report icon in the Actions Column.

Downloading a Campaign Performance Report from the Actions Column

1. Go to the Actions Column and click the 'Download Publisher Campaign Performance' icon 



2. You will need to agree to the download terms and conditions to select 'Download'.



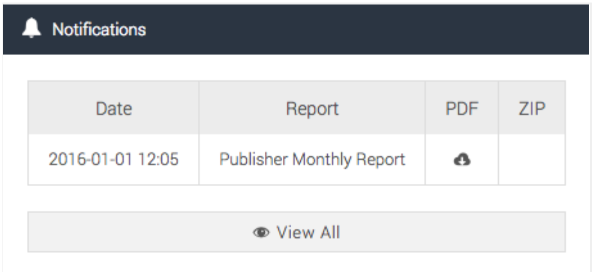
3. You will receive an email once your download is complete. Alternatively, you can find your downloaded reports by selecting the [Exports] button. An example report:

	A	B	C	D	E	
1	This Report Produced	14:24 23-Mar-2018 GMT				
2	Report Start Date	01-Jan-2017 GMT				
3	Report End Date	31-Dec-2018 GMT				
4						
5	Publisher	Twitter				
6	Campaign	44004 - B2B Symantec Demo Q1 2018				
7						
8	Total Impressions	765				
9	Total Clicks	404				
10	Total Conversions	83				
11	Total Invalid Leads	18				
12	Total Valid Leads	65				
13	Total Billable Leads	65				
14	Total Required	100				
15	Earnings	£3250.00				
16						
17	ID	Campaign ID	Created Ts	Sub ID	Link ID	Billable
18	1362	44004	2017-02-15 17:21:13		82	Yes
19	1340	44004	2017-02-15 17:20:37		83	Yes
20	1337	44004	2017-02-15 17:20:33		83	Yes
21	1332	44004	2017-02-15 17:16:54		82	Yes
22	1322	44004	2017-02-15 17:16:43		73	No
23	1314	44004	2017-02-15 17:16:31		73	Yes
24	1305	44004	2017-02-15 17:16:08		82	Yes
25	1303	44004	2017-02-15 17:16:05		81	Yes
26	1289	44004	2017-02-15 17:15:48		83	Yes
27	1272	44004	2017-02-15 17:15:26		81	Yes
28	1269	44004	2017-02-15 17:15:23		81	No

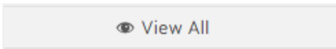
Accessing Past Reports

As well as looking at your most recent results, you can also access all your previous reports at any time by following the steps below:

1. At the top of the screen select the notification symbol:
2. Your most recent reports will be shown in the drop-down screen. These will disappear once they have been downloaded:



3. Select View All to see past reports



Review: Reporting

You should now know:

- How to view your live campaign performance in the Campaign Reporting Tab
- How to generate a Campaign Performance Report from the Campaign Reporting Tab
- How to generate a Campaign Performance Report from the Actions Columns
- How to access past reports

Additional Support for GDPR / Data Compliance

You should be aware that Publishers accounts have a specialised view of the Convertr platform; one that shows the essential tools and features you need to deliver campaigns successfully. However, if you are concerned about GDPR or looking to advance your current lead generation process, then the fully licensed view of Convertr can provide you with access to a range of additional features.

To help you address any possible business concerns around compliance, we have included a list of features available in the full Convertr platform. These are particularly useful for anyone preparing to meet the requirements of the GDPR, the new data protection law coming into force on 25 May 2018:

Subject Access Request Tool	A straightforward tool to search, export and delete the data of a specific individual in the event of a Subject Access Request.
Email & Telephone Suppression	If you receive an objection or a request under the right to erasure, you can ensure that lead is swiftly deleted or suppressed from Convertr's processing activities using this feature.
System & Campaign Auditing	Convertr ensures each action is tracked and can provide a record of responsibility for any changes. This is particularly useful when modifications are made to Personally Identifiable Information (PII)
Data Masking	A useful privacy tool for helping you ensure your lead data is secured - even whilst interacting with the campaign around it
Form Builder: Opt-In	Using our form builder, you can quickly and easily design powerful forms, complete with built-in 'opt-in' boxes
Double Opt-In	A very useful function to take the extra step of gaining double opt in on the campaign
Data Deletion & Retention Period	Two very helpful tools to help you delete PII data: you can automatically delete after a set time frame, or right after integration

If you're interested in accessing these features, or want to learn more about the tools available, then you can email support@convertr.io at any time. One of our team will help and discuss any compliance challenges that you have concerns about.

REVIEW

Course Summary

Congratulations, that's everything you need to know about the platform! What's next you ask? Earn your official Convertr Certification!

1. Register for the course at convertr.io/certifications
2. Complete the online modules and section quizzes
3. Successfully complete the test with a score of 80% or more to pass