



Welcome to Connect Enterprise Solutions

USER MANUAL

ENTITY

CONTENTS

USER FUNCTIONALITY	PAGE #
<u>WEBSITE /LANDING PAGE</u>	7
<u>REGISTRATION</u>	8
<i><u>REGISTRATION – SELECT TYPE OF REGISTRATION</u></i>	9
<i><u>REGISTRATION - ENTITY LOGIN /SINGUP PAGE</u></i>	10
<i><u>REGISTRATION - SELECT COMPANY LOCATION</u></i>	11
<u>NEW ENTITY REGISTRATION</u>	12
<i><u>NEW ENTITY REGISTRATION - FEE DETAILS</u></i>	13
<i><u>NEW ENTITY REGISTRATION - SIGN UP/ MOBILE VERIFICATION</u></i>	14
<i><u>NEW ENTITY REGISTRATION - EMAIL CONFIRMATION LINK</u></i>	15
<i><u>NEW ENTITY REGISTRATION - EMAIL VERIFICATION CONFIRMATION</u></i>	16
<u>ENROL ENTITY (ALREADY REGISTERED)</u>	17
<i><u>ENTITY ENROLMENT – INITIATION</u></i>	18
<i><u>ENTITY ENROLMENT – SUBMISSION OF ENTITY ID</u></i>	19
<i><u>ENTITY ENROLMENT – OTP /EMAIL VERIFICATION PROCESS</u></i>	20
<i><u>ENTITY ENROLMENT - SUCCESSFUL REQUEST SUBMISSION</u></i>	21
<i><u>ENTITY ENROLMENT - ENTITY LOGIN PANEL</u></i>	22
<i><u>ENTITY ENROLMENT – TWO WAY AUTHENTICATION PROCESS</u></i>	23
<u>ASSET FOR VERIFICATION</u>	24

CONTENTS

USER FUNCTIONALITY	PAGE #
<u>ASSET FOR VERIFICATION - HEADER</u>	25
<u>ASSET FOR VERIFICATION - TEMPLATE</u>	26
<u>ENTITY – TELEMARKETER REQUEST</u>	27
<u>TELEMARKETER REQUEST – TM ID SUBMISSION</u>	28
<u>TELEMARKETER REQUEST – REQUEST SUBMISSION</u>	29
<u>TELEMARKETER REQUEST – REQUEST STATUS</u>	30
<u>ENTITY – TELEMARKETER REVOCATION</u>	31
<u>ENTITY- TELEMARKETER RELATIONSHIP REVOCATION</u>	32
<u>ENTITY – TELEMARKETER REVOCATION CONFIRMATION</u>	33
<u>ENTITY- TELEMARKETER REVOCATION STATUS</u>	34
<u>HEADER</u>	35
<u>HEADER CREATION – HEADER PAGE</u>	36
<u>HEADER CREATION – TYPE & CATEGORY SELECTION</u>	37
<u>HEADER CREATION – VALIDATION TABLE</u>	38
<u>HEADER CREATION – NAME, AVAILABILITY & DOC UPLOAD</u>	39
<u>HEADER CREATION – OTP VERIFICATION & REQUEST SUBMISSION</u>	40
<u>HEADER CREATION – HEADER STATUS</u>	41
<u>STATUS – OTHER TSP’S HEADER</u>	42
<u>CLAIM HEADER</u>	43

CONTENTS

USER FUNCTIONALITY	PAGE #
CLAIM HEADER – REQUEST SUBMISSION	45
CLAIM HEADER – FILL CLAIM FORM	46
CLAIM HEADER – REMARKS/OTP/SUBMISSION OF CLAIM	47
CLAIM HEADER – REQUEST STATUS	48
HEADER SURRENDER	49
HEADER SURRENDER - INITIATION	50
HEADER SURRENDER – OTP/CONFIRMATION	51
HEADER SURRENDER – STATUS	52
CONSENT TEMPLATE	53
CONSENT TEMPLATE – CREATION OF CONSENT TEMPLATE	54
CONSENT TEMPLATE – REQUEST SUBMISSION	55
CONSENT TEMPLATE – REQUEST STATUS	56
REGISTER – OTHER TSP’S CONSENT TEMPLATE	57
TEMPLATE (CONTENT)	58
TEMPLATE – CREATION OF NEW TEMPLATE	59
TEMPLATE – SELECTION OF NAME/COMMUNICATION AND CONTENT TYPE	60
TEMPLATE – SELECTION OF CONSENT TEMPLATE /CONTENT CATEGORY	61
TEMPLATE – CREATION OF CONTENT	62
TEMPLATE – OTP/REQUEST SUBMISSION	63
EDIT- TEMPLATE REQUEST	64

CONTENTS

USER FUNCTIONALITY	PAGE #
<u>RE-SUBMISSION – TEMPLATE REQUEST</u>	65
<u>BLACKLIST– TEMPLATE REQUEST</u>	66
<u>REGISTER – OTHER TSP’S TEMPLATE</u>	67
<u>STATUS – OTHER TSP’S TEMPLATE</u>	68
<u>REPORTS</u>	69
<u>ENTITY REPORTS</u>	70
ENTITY SUB USER	71
<u>ENTITY SUB USER</u>	72
<u>ENTITY SUB USER CREATION</u>	73
<u>ENTITY SUB USER ROLE ASSIGN</u>	74
<u>ENTITY SUB USER ROLE EDITION</u>	75
<u>ENTITY PROFILE</u>	76
<u>PROFILE PAGE</u>	77
<u>PROFILE UPDATE PAGE</u>	78
<u>PROFILE – CHANGE PASSWORD</u>	79
<u>CHECK STATUS</u>	80
<u>APPLICATION – STATUS CHECK</u>	81
<u>STATUS CHECK – SELECTION OF MODULE</u>	82
<u>CHECK STATUS – REFERENCE ID SUBMISSION</u>	83

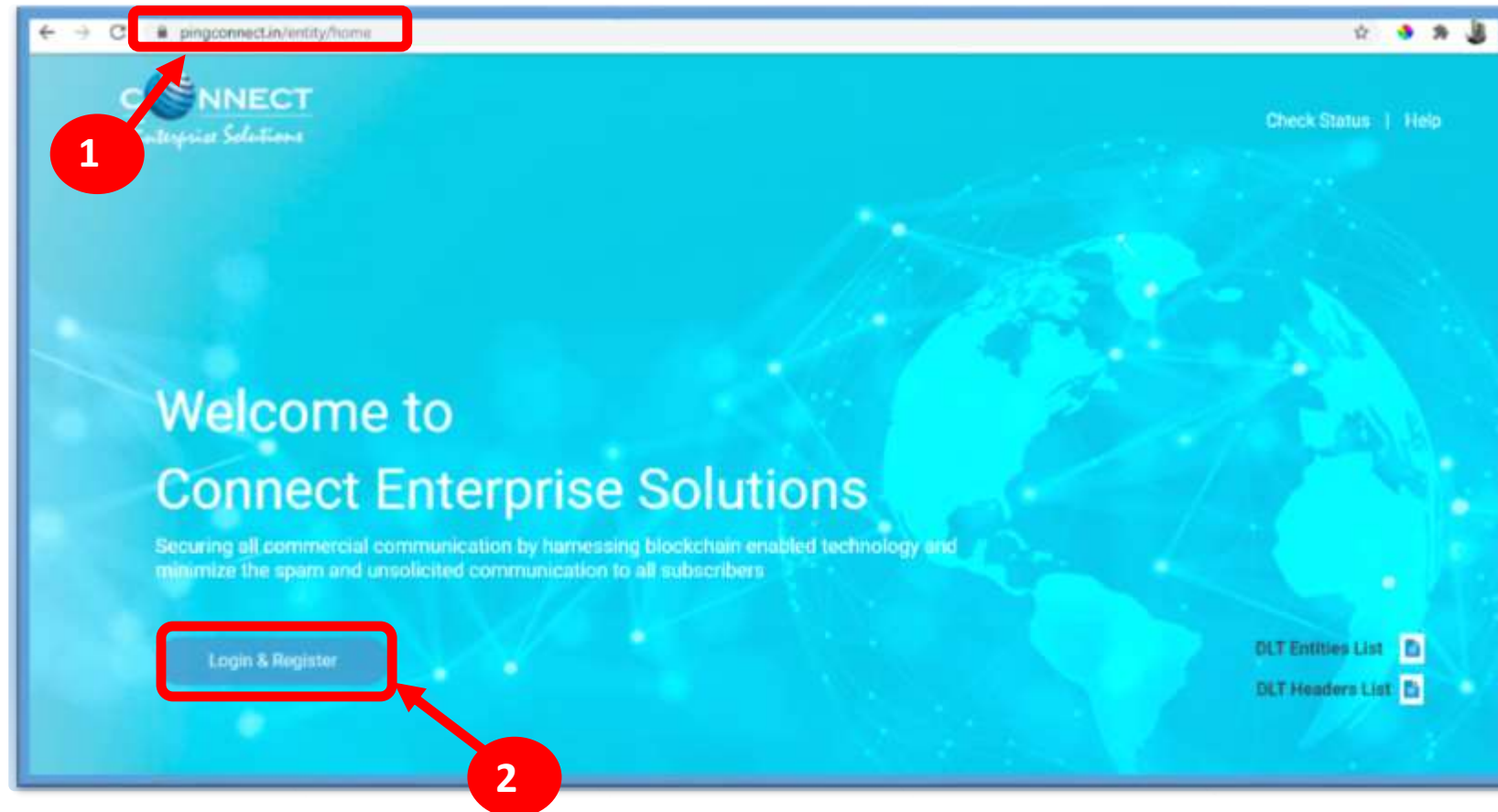
CONTENTS

USER FUNCTIONALITY	PAGE #
ENTITY APPLICATION RE-SUBMISSION	84
<u>CHECK STATUS – APPLICATION RE-SUBMISSION</u>	85
<u>SYSTEM REQUIREMENT</u>	86
<u>SYSTEM REQUIREMENT - SPECIFICATIONS</u>	87

WEBSITE / LANDING PAGE

1 Visit www.pingconnect.in URL to Login/Register yourself as Entity/Telemarketer

2 Click on Login/Signup button to Login or register yourself as Entity/Telemarketer



REGISTRATION

REGISTRATION – SELECT TYPE OF REGISTRATION

1 To register yourself as an Entity on the portal, select the “**As Entity**” option in the Type of Operation.



A Business unit, Company, Legally Recognised Institution or Person engaged in business or service who would like to send communications to customers or intended recipients through SMS or voice call through a registered telemarketer.

2

Click **Next** button for further steps towards registration.

The screenshot displays the 'CONNECT Enterprise Solutions' logo at the top. Below it, the text 'Select the type of operation' is followed by 'to login or register account *'. Two radio button options are shown: 'As Entity' (which is selected and highlighted with a red box and a red arrow labeled '1') and 'As Telemarketer'. At the bottom right of the form, a blue 'Next' button is highlighted with a red box and a red arrow labeled '2'.

REGISTRATION - ENTITY LOGIN /SINGUP PAGE

3

Click **Sign Up** Button to start registration process.

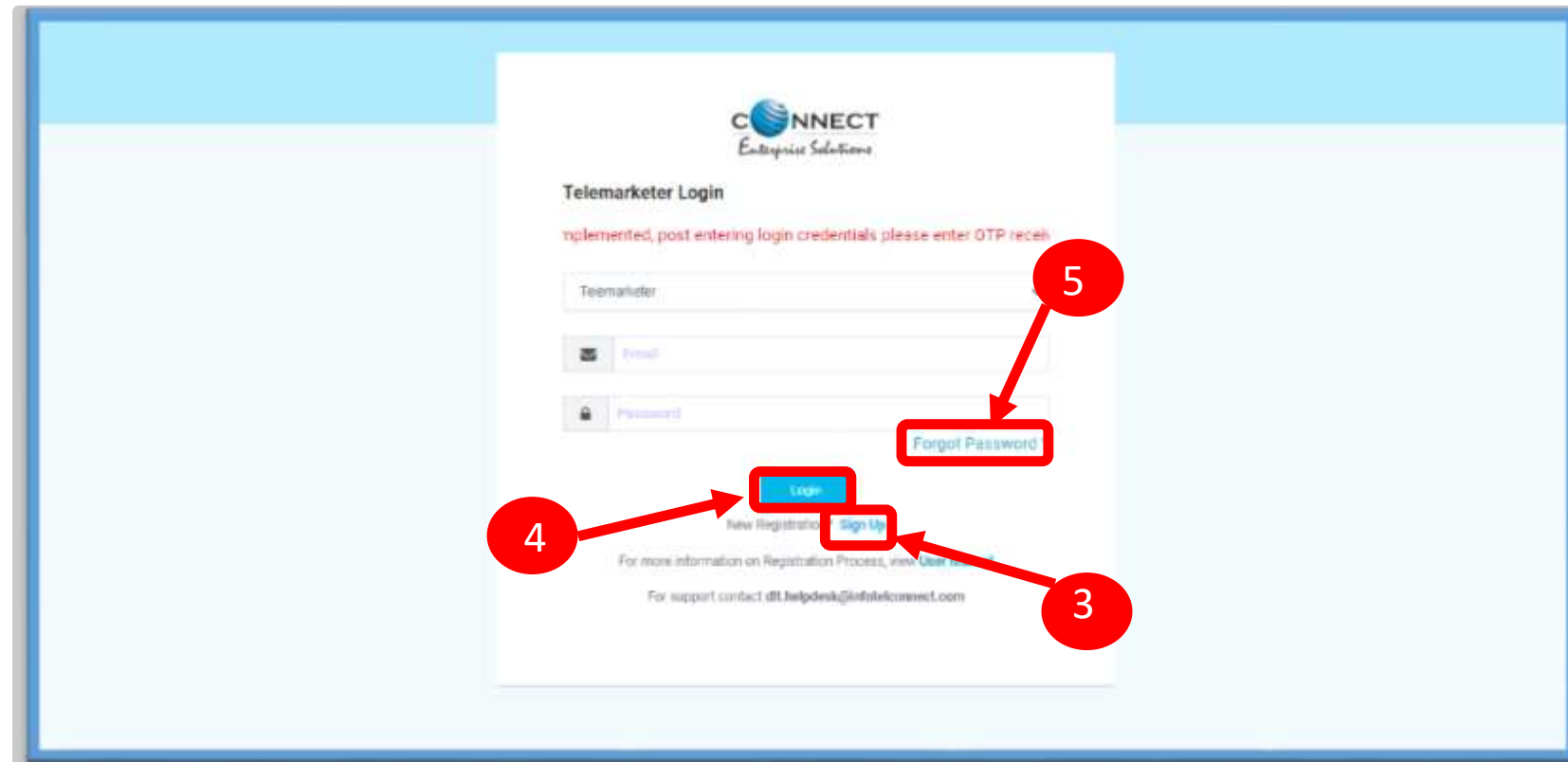
4

Put in Email ID & Password and Click **Login** Button to access the panel, if you already registered as Entity.

5

Click [Forgot password?](#) in case you forgot the password.

(The New Password will be sent to your Registered Email ID.)

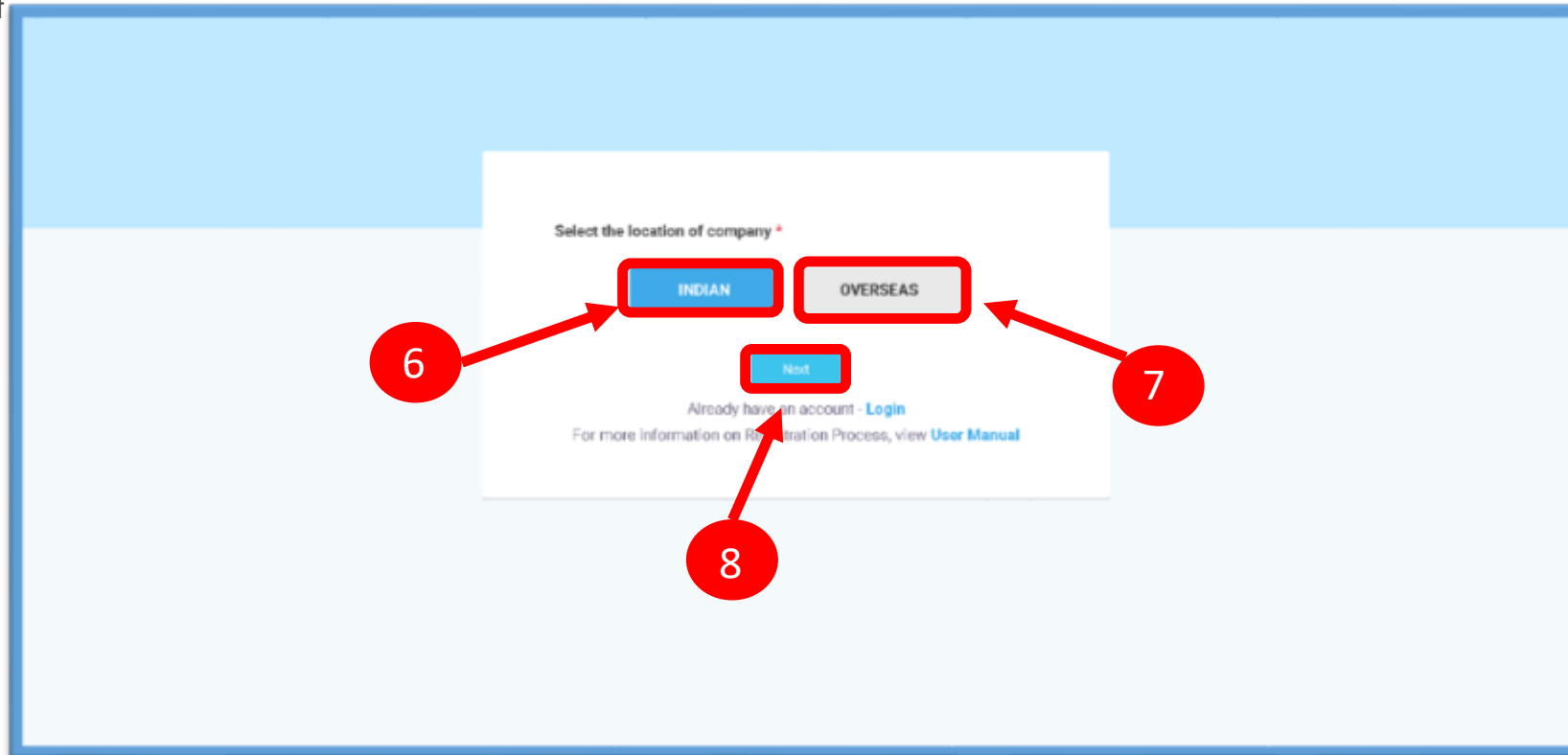


REGISTRATION - SELECT COMPANY LOCATION

6 Select the Location of Company. Choose **Indian** if your company is Indian Origin.

7 Choose **Overseas** if your company is Overseas origin.

8 After selecting the company's location click **Next** Button for further steps.




NEW ENTITY REGISTRATION

NEW ENTITY REGISTRATION - FEE DETAILS

1 Select the Registration type. Choose **New Registration** if you are registering for the first time.

2 After Selecting New Registration, confirm the Payment terms by clicking **Ok** button.

Duly fill the customer acquisition form and submit.



The screenshot displays the 'CUSTOMER ACQUISITION FORM' interface. At the top, the 'CONNECT Enterprise Solutions' logo is visible. Below the logo, there are two radio button options: 'New Registration' (which is selected and highlighted with a red box and a red arrow labeled '1') and 'Enrol Entity (Already Registered with other operator on DLT)'. A link for 'User Manual' is provided for more information. A modal dialog box is overlaid on the form, containing the following text:

- 1. Non Refundable one time processing fees of Rs.5900 (inclusive of 18% GST) is applicable for new registration/enrolment.
- 2. In case of TDS Deduction, please provide your registered TAN.
- 3. We do not accept third party payments.

Below the list, it states: 'For Banks Details refer link below the registration form. You can provide the payment details at the note section,'. At the bottom right of the dialog, there is a blue 'Ok' button highlighted with a red box and a red arrow labeled '2'.

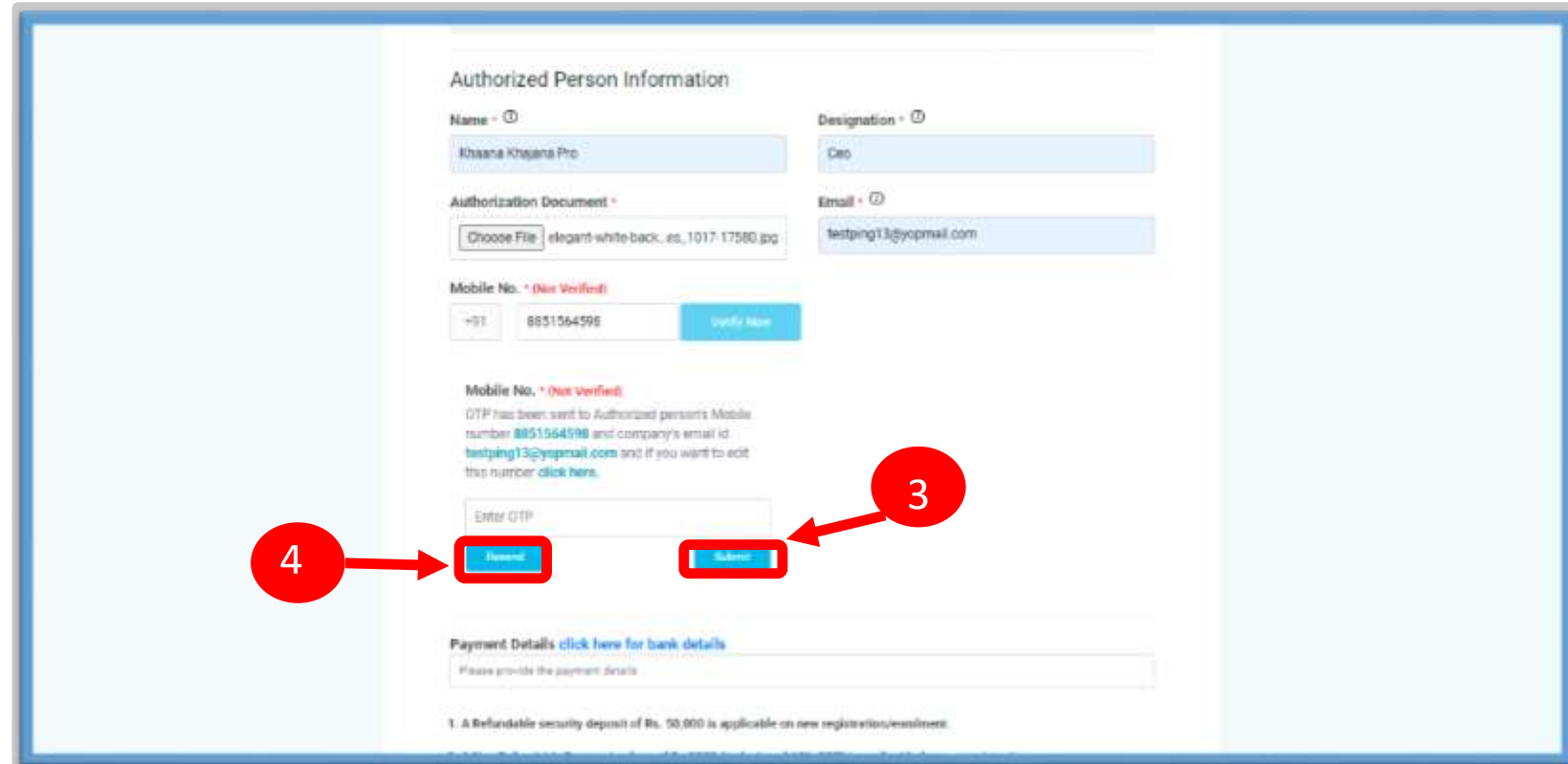
NEW ENTITY REGISTRATION - SIGN UP/ OTPVERIFICATION

3

You will receive an OTP on your registered Mobile number and Email ID to verify mobile number. Enter OTP and click **Submit** button.

4

If in case OTP not received, click **Resend** button



The screenshot shows a web form titled "Authorized Person Information". It contains several input fields: "Name" (filled with "Khaana Khaana Pro"), "Designation" (filled with "Ceo"), "Authorization Document" (with a "Choose File" button and a filename "elegant-white-back_es,1017.17580.jpg"), and "Email" (filled with "testping13@yopmail.com"). Below these is a "Mobile No." field (filled with "8851564598") with a "Verify Now" button. A message states: "OTP has been sent to Authorized person's Mobile number 8851564598 and company's email id testping13@yopmail.com and if you want to edit this number click here." Below this message is an "Enter OTP" input field, a "Resend" button (annotated with a red circle 4 and an arrow), and a "Submit" button (annotated with a red circle 3 and an arrow). At the bottom, there is a "Payment Details" section with a link "click here for bank details" and a text box "Please provide the payment details". A footer note states: "1. A Refundable security deposit of Rs. 50,000 is applicable on new registration/renewal."

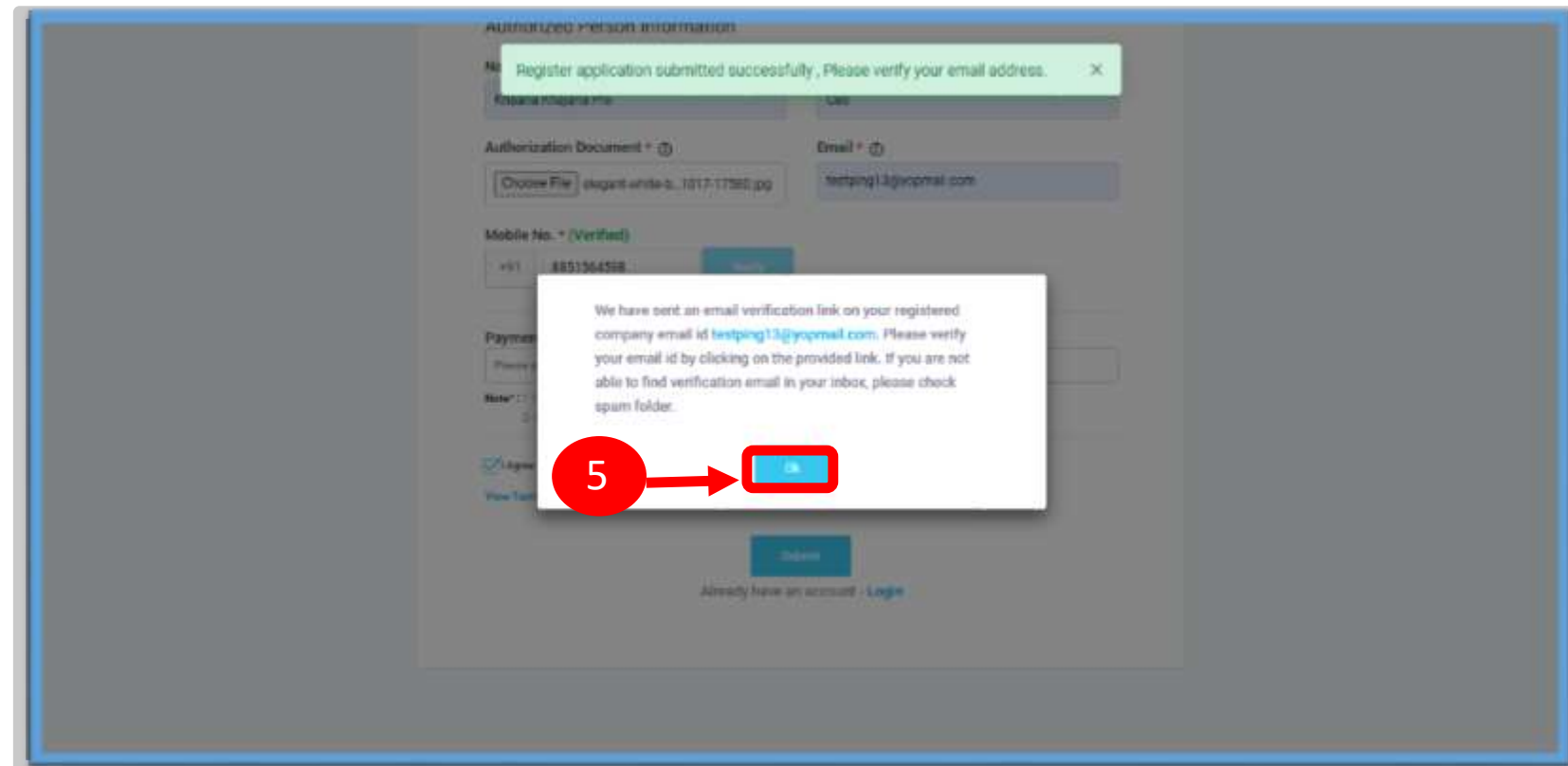
NEW ENTITY REGISTRATION - EMAIL CONFIRMATION LINK

5

After verifying OTP, a verification link will be sent to your registered email Id.

Click **OK** button once you read the message and validate your email address by clicking the verification link received on your registered email id.

Please check your email inbox as well as spam folder for the verification link.



The screenshot shows a registration form titled "AUTHORIZED PERSON INFORMATION". A green notification banner at the top states: "Register application submitted successfully, Please verify your email address." The form fields include:

- Name:** Kirpana Khagena Rao
- Authorization Document:** Choose File (ekgnt-white-b, 1017-11380.jpg)
- Email:** testping13@gmail.com
- Mobile No. * (Verified):** +91 8851564508
- Payment:** Pending
- State:** Karnataka
- Agree:** ☒ Agree
- View Terms** (link)

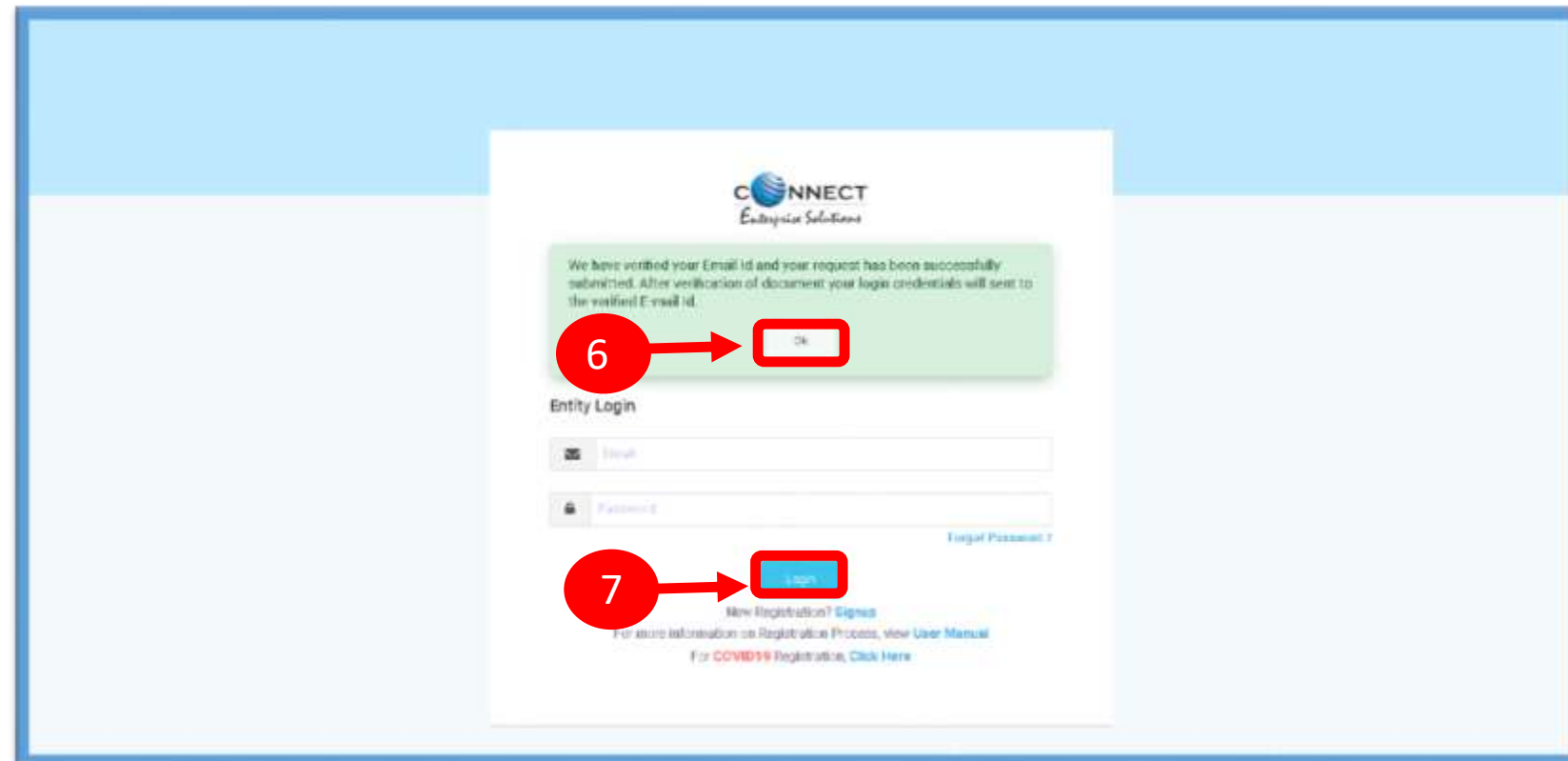
A white dialog box is overlaid on the form, containing the text: "We have sent an email verification link on your registered company email id testping13@gmail.com. Please verify your email id by clicking on the provided link. If you are not able to find verification email in your inbox, please check spam folder." The dialog box has an "OK" button highlighted with a red box. A red circle with the number "5" and an arrow points to this "OK" button.

NEW ENTITY REGISTRATION - EMAIL VERIFICATION CONFIRMATION

6 On successful email id verification you will receive a message confirming the submission of your application, press **OK** after reading the message to close the notification.

Once Operator approves your application, you will receive login credentials on your registered email id.


7 Use the login credentials sent by the operator to access the entity portal and Click **Login**

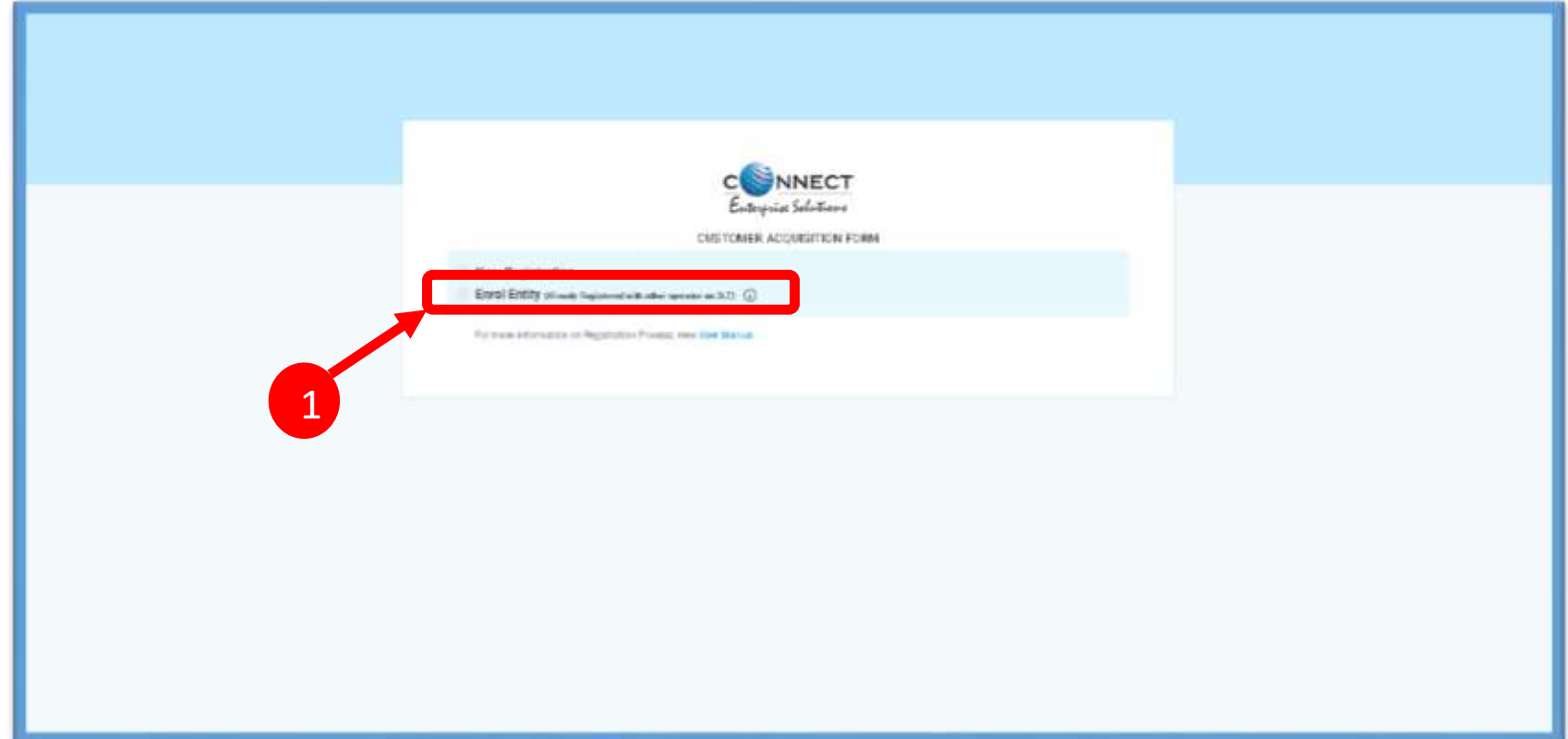


ENROL ENTITY (ALREADY REGISTERED)

ENTITY ENROLMENT – INITIATION

1 Choose **Enrol Entity** if your company is already registered on different operator and Fill the form.

 *Entity already registered with other operator on DLT can enrol by providing Entity ID (DLT Registration Number)*



CONNECT
Enterprise Solutions

CUSTOMER ACQUISITION FORM

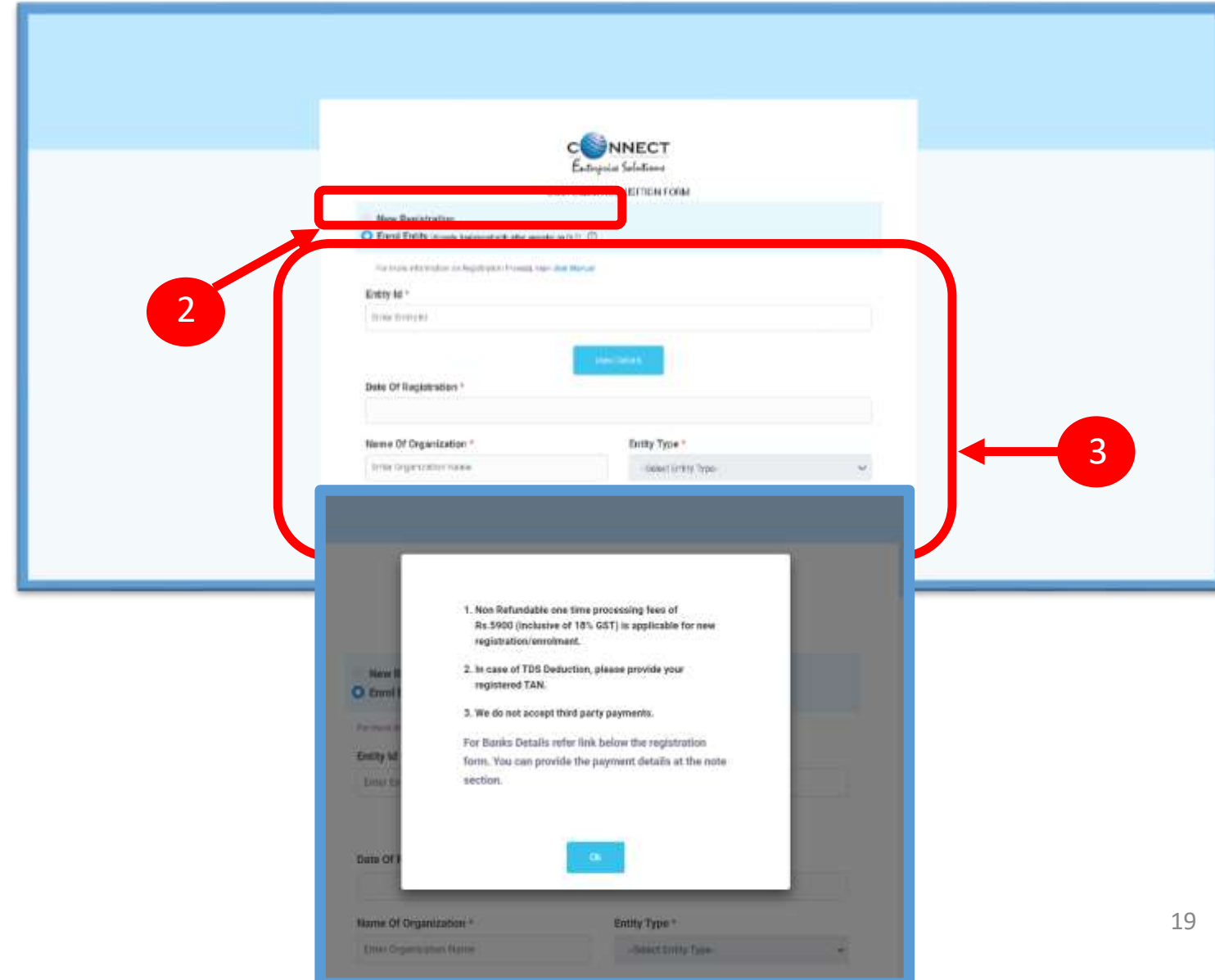
Enrol Entity (already Registered with other operator on DLT)

For more information on Registration Process, view DLT Status

ENTITY ENROLMENT – SUBMISSION OF ENTITY ID

2 After selecting **Enrol Entity** the form will scroll down which needs to be filled by the user for registering

3 Type in the already registered **Entity Id** and click View details button. Duly Fill the form and click Submit.



The screenshot shows the 'New Registration' form on the CONNECT Enterprise Solutions website. A red box highlights the 'New Registration' link at the top. A red arrow points from the 'Entity Id' input field to a red circle labeled '2'. Another red arrow points from the 'View Details' button to a red circle labeled '3'. A red box highlights the 'Entity Id' input field. Below the form, a modal window displays the following text:

1. Non Refundable one time processing fees of Rs.5900 (inclusive of 18% GST) is applicable for new registration/enrolment.
2. In case of TDS Deduction, please provide your registered TAN.
3. We do not accept third party payments.

For Banks Details refer link below the registration form. You can provide the payment details at the note section.

The form fields include:

- Entity Id *
- Date Of Registration *
- Name Of Organization *
- Entity Type *

Buttons: View Details, Submit.

ENTITY ENROLMENT – OTP /EMAIL VERIFICATION PROCESS

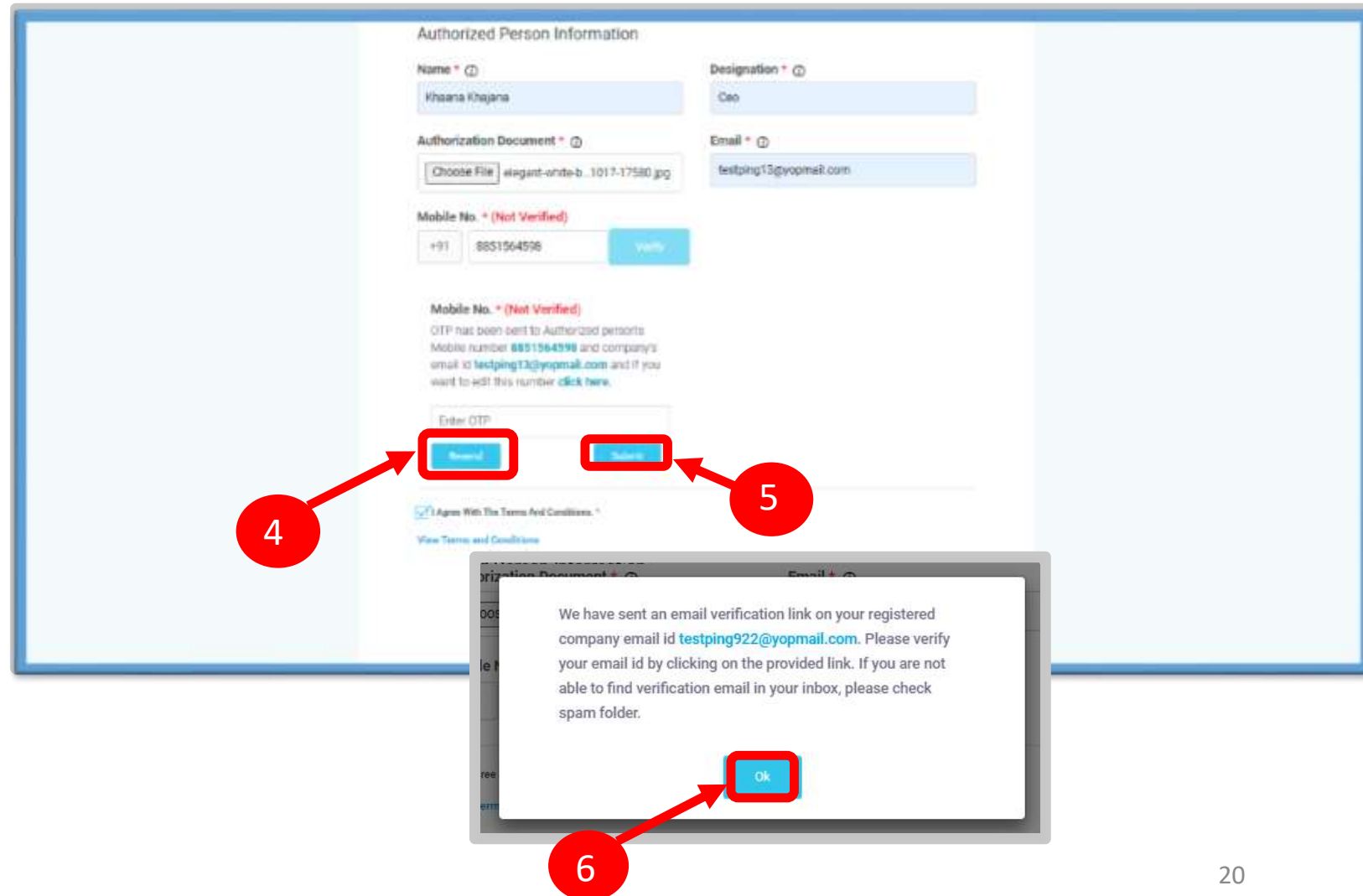
4 You will receive an **One Time Password (OTP)** on your registered Mobile number and Email ID to verify mobile number.

Enter OTP and click **Submit** button.

5 If in case OTP not received, click **Resend** button

6 After verifying OTP, a verification link will be sent to your registered email Id.
Click **OK** button once you read the message and validate your mail by clicking the verification link received on your registered email id.

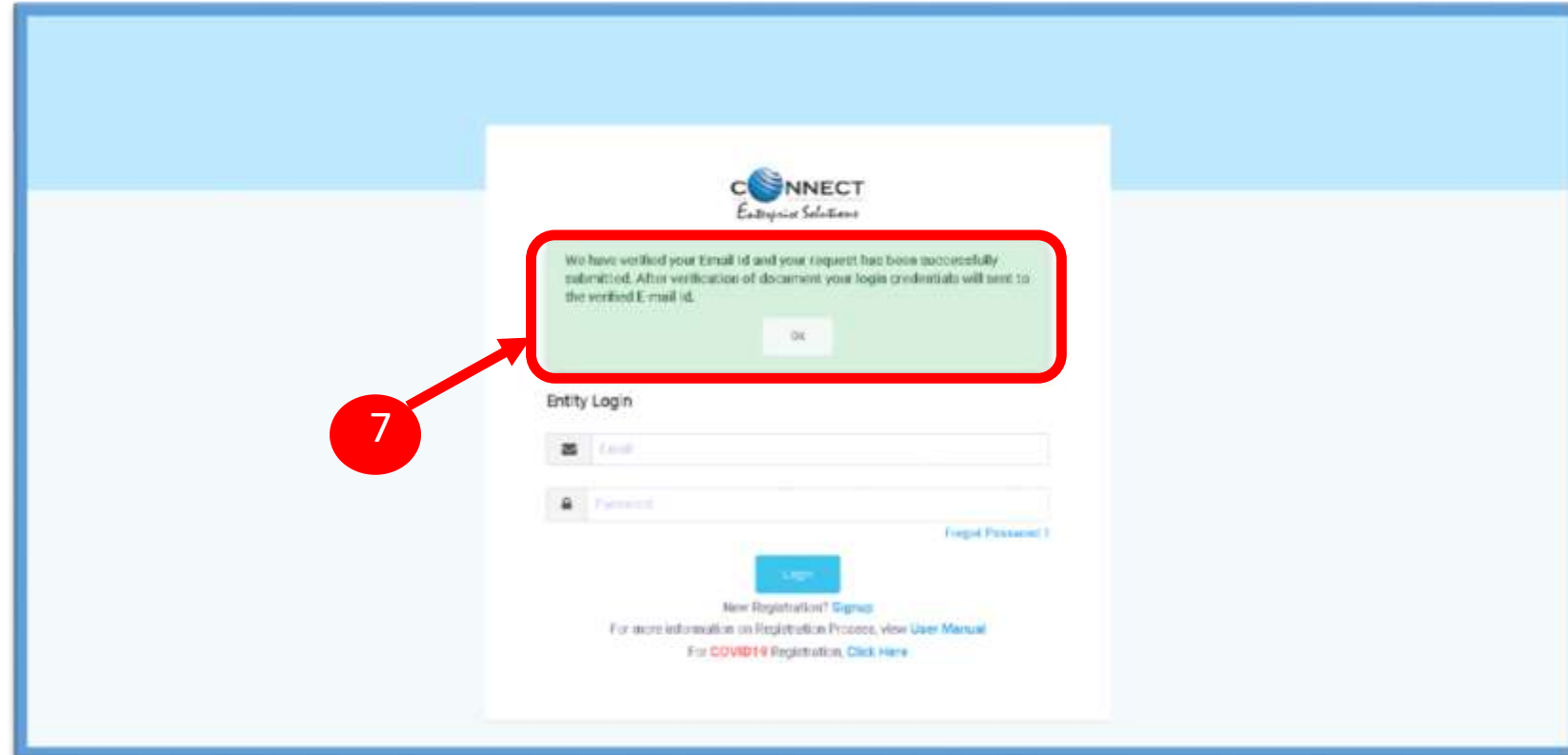
Please check your email inbox as well as spam folder for the verification link.



The screenshot shows the 'Authorized Person Information' form. It includes fields for Name, Designation, Authorization Document, Email, and Mobile No. The Mobile No. field is marked as '(Not Verified)'. Below the form, there are 'Resend' and 'Submit' buttons. A red circle with the number '4' points to the 'Resend' button. A red circle with the number '5' points to the 'Submit' button. Below the form, there is a message box that says: 'We have sent an email verification link on your registered company email id testing922@yopmail.com. Please verify your email id by clicking on the provided link. If you are not able to find verification email in your inbox, please check spam folder.' A red circle with the number '6' points to the 'Ok' button in the message box.

ENTITY ENROLMENT - SUCCESSFUL REQUEST SUBMISSION

- 7 After email verification Click **OK.** button to Confirm. Once Operator approves your application, you will receive login credentials on your registered email id.



ENTITY ENROLMENT - ENTITY LOGIN PANEL

8

If you already registered as Entity.
Put in Email ID & Password and
Click **Login** Button to access the panel.

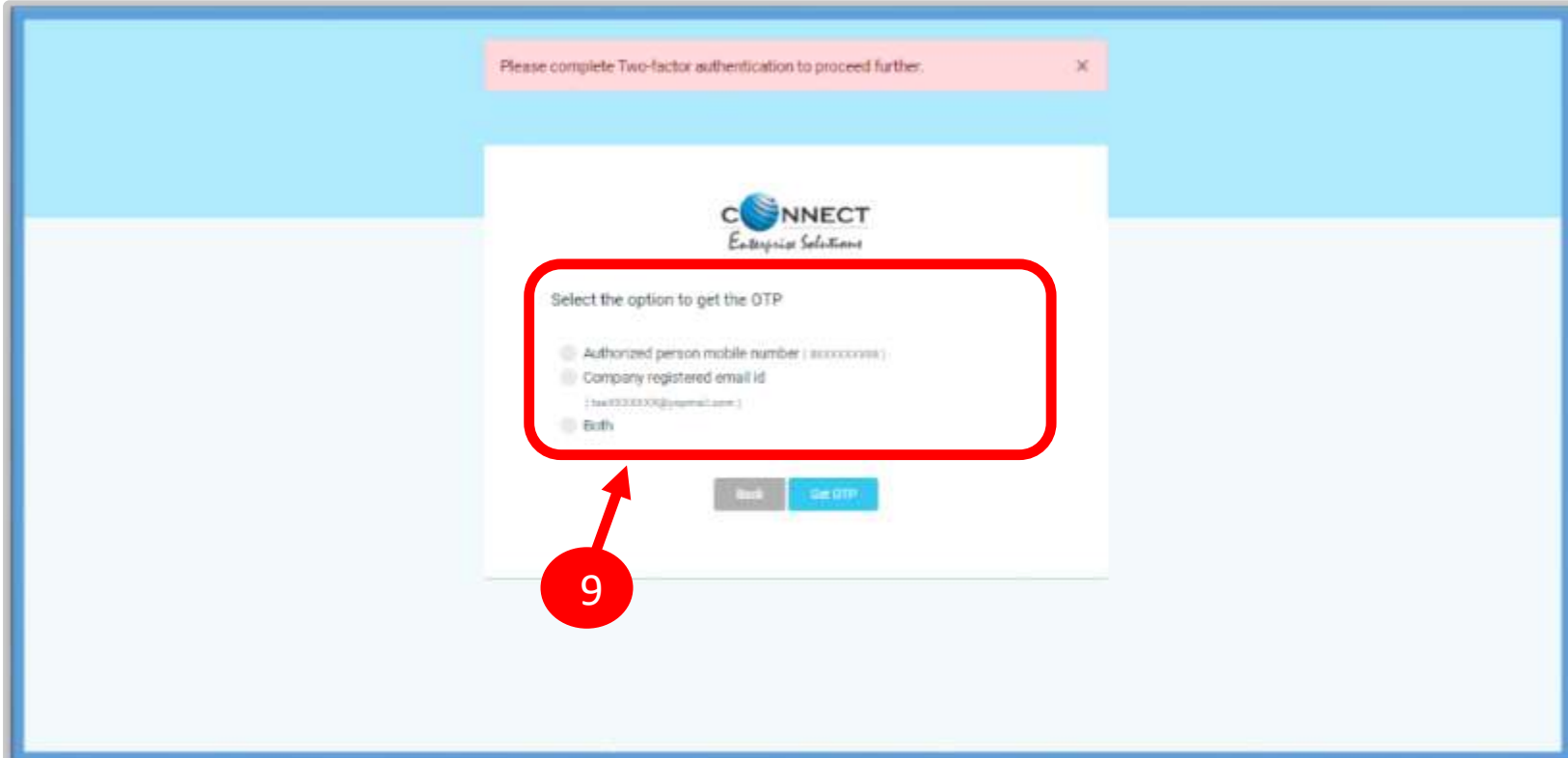


The screenshot displays the 'Entity Login' interface. At the top, the 'CONNECT Enterprise Solutions' logo is visible. Below it, the text 'Entity Login' is centered. A red-bordered box highlights the login fields, which include an 'Email' input field with an envelope icon and a 'Password' input field with a lock icon. To the right of the password field is a link that says 'Forgot Password?'. Below the login fields is a blue 'Login' button, which is also highlighted with a red box. A red arrow points from a red circle containing the number '8' to the 'Login' button. Above the login fields, a red text message states 'Two level authentication implemented, post entering login'. At the bottom of the page, there are links for 'New DLT Registration? Click Here' and 'For more information on Registration Process, view User Manual', along with a support contact email: 'support contact dlt.helpdesk@infotelconnect.com'.

ENTITY ENROLMENT – TWO WAY AUTHENTICATION PROCESS

9

You have to complete the **Two Way Authentication Process** by submitting the OTP received on option chosen.



Please complete Two-factor authentication to proceed further. X

CONNECT
Enterprise Solutions

Select the option to get the OTP

- ☐ Authorized person mobile number (XXXXXXXXXX)
- ☐ Company registered email id
(XXXXXXXXXX@gmail.com)
- ☐ Both

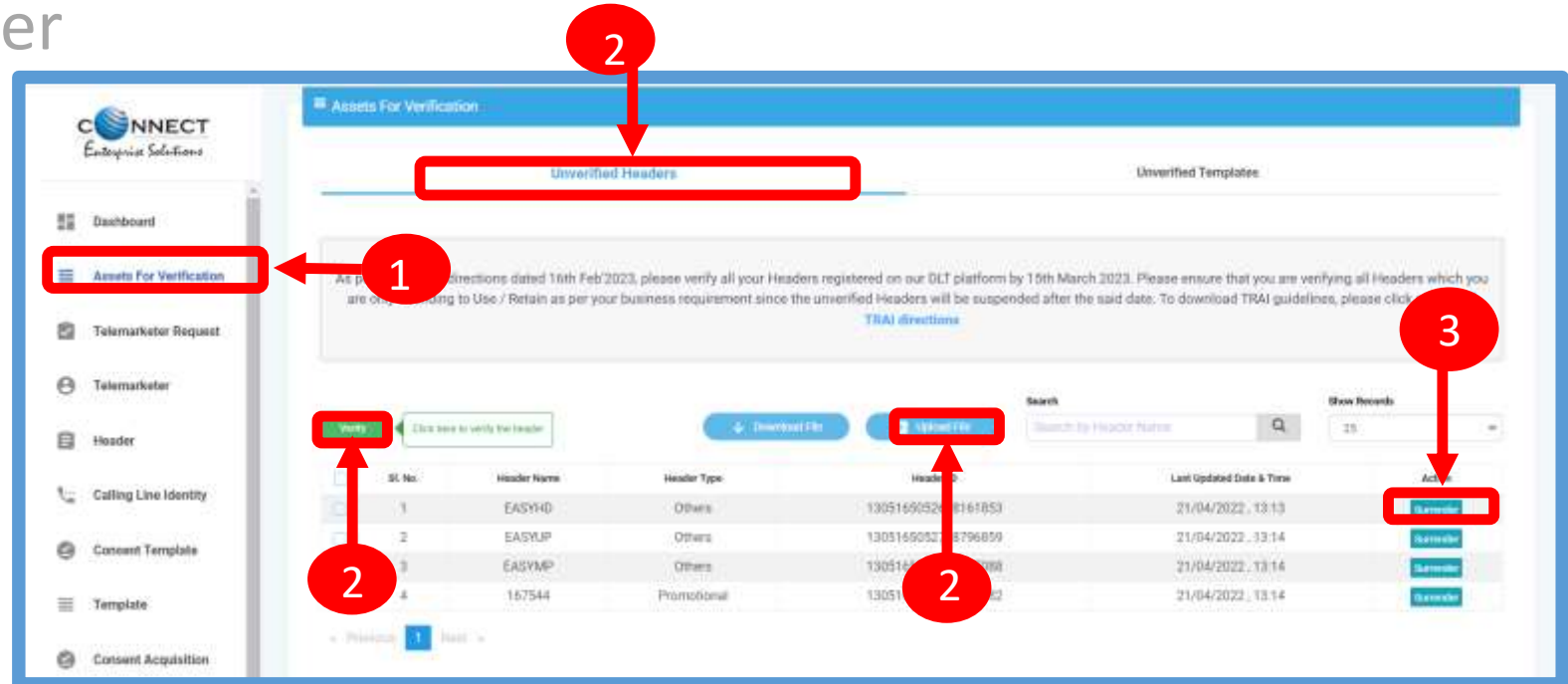
Back Get OTP

9

ASSEST FOR VERIFICATION

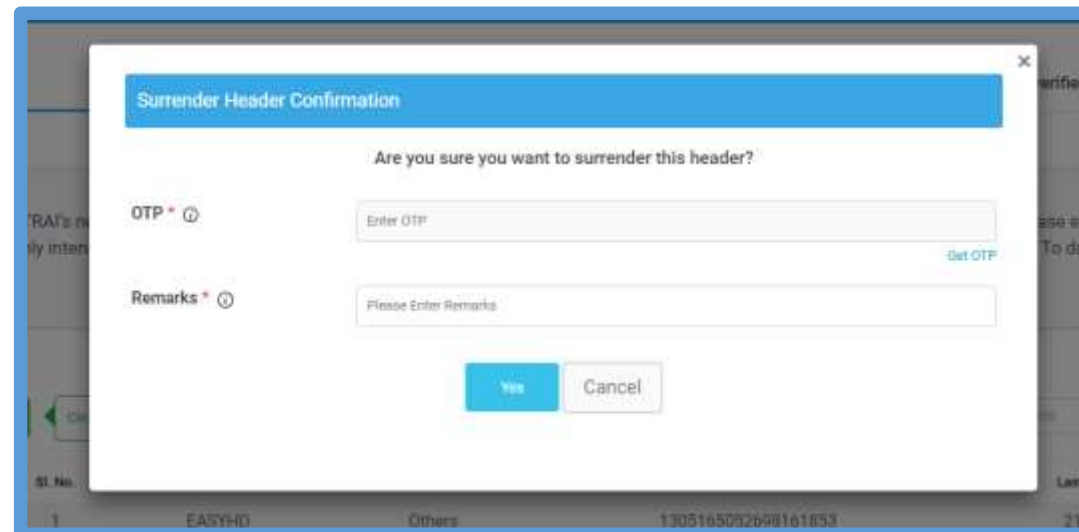
Assets For Verification - Header

- 1 Click Assets for Verification on the left panel to Verify all the unverified Headers of the Entity.
- 2 Click on unverified headers the user can verify the headers by single & Bulk selection.
- 3 Click on surrender button to surrender the header Surrender Header Confirmation pop Up will appear enter OTP & Remarks to surrender the same.



The screenshot displays the 'Assets For Verification' section of the CONNECT Enterprise Solutions interface. The left sidebar contains a menu with 'Assets For Verification' highlighted. The main content area shows a table of unverified headers. The table has columns for SL No., Header Name, Header Type, Header ID, and Last Updated Date & Time. The first three rows of the table are highlighted. The 'Surrender' button is visible in the 'Actions' column for each row.

SL No.	Header Name	Header Type	Header ID	Last Updated Date & Time
1	EASYHD	Others	1305165052698161853	21/04/2022, 13:13
2	EASYUP	Others	1305165052698161859	21/04/2022, 13:14
3	EASYMP	Others	1305165052698161860	21/04/2022, 13:14



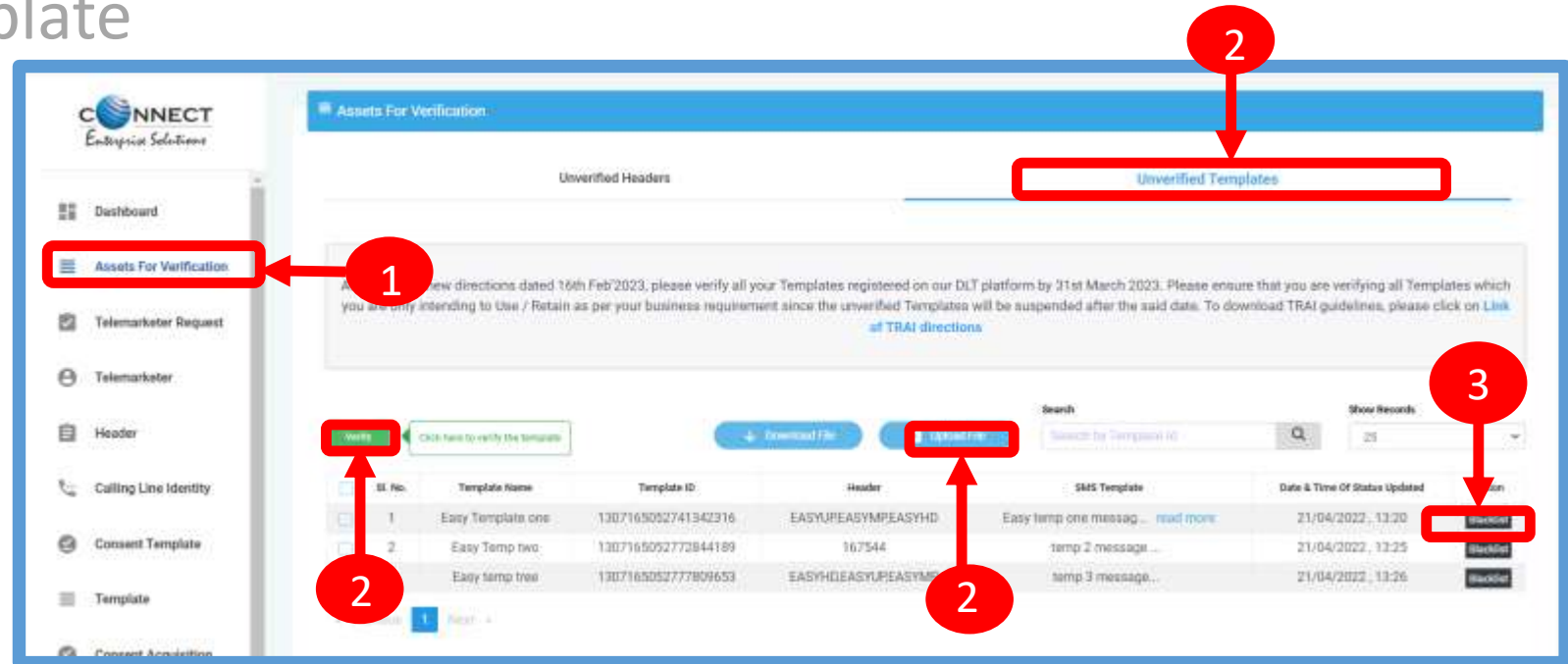
The screenshot shows a 'Surrender Header Confirmation' pop-up dialog. The dialog has a title bar and a main content area. The main content area contains the text 'Are you sure you want to surrender this header?'. Below this text are two input fields: 'OTP *' and 'Remarks *'. The 'OTP *' field has a 'Get OTP' button next to it. The 'Remarks *' field has a placeholder text 'Please Enter Remarks'. At the bottom of the dialog are two buttons: 'Yes' and 'Cancel'.

Assets For Verification – Template

1 Click Assets for Verification on the left panel to Verify all the unverified Templates of the Entity.

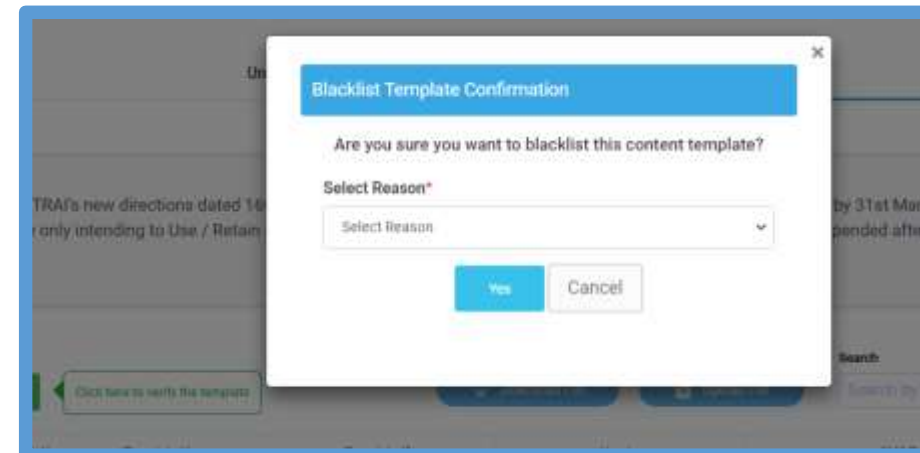
2 Click on unverified Templates the user can verify the all templates by single & Bulk selection.

3 Click on Blacklist button to Blacklist the Template
An pop Up will appear to Blacklist Template
Confirmation enter reason to Blacklist the same.



The screenshot displays the 'Assets For Verification' interface. The left sidebar contains a menu with 'Assets For Verification' highlighted. The main content area shows a table of unverified templates. The table has columns for SL No., Template Name, Template ID, Header, SMS Template, and Date & Time Of Status Updated. The 'Blacklist' button is visible in the bottom right corner of the table.

SL No.	Template Name	Template ID	Header	SMS Template	Date & Time Of Status Updated
1	Easy Template one	1307165052741342316	EASYUPEASYMPEASYHD	Easy temp one message... read more	21/04/2022, 12:20
2	Easy Temp two	1307165052772844189	167544	temp 2 message...	21/04/2022, 12:25
	Easy temp tree	1307165052777809653	EASYHDIEASYUPEASYM	temp 3 message...	21/04/2022, 12:26



The 'Blacklist Template Confirmation' dialog box is shown. It contains the text 'Are you sure you want to blacklist this content template?' and a 'Select Reason*' dropdown menu. The 'Yes' and 'Cancel' buttons are located at the bottom of the dialog.

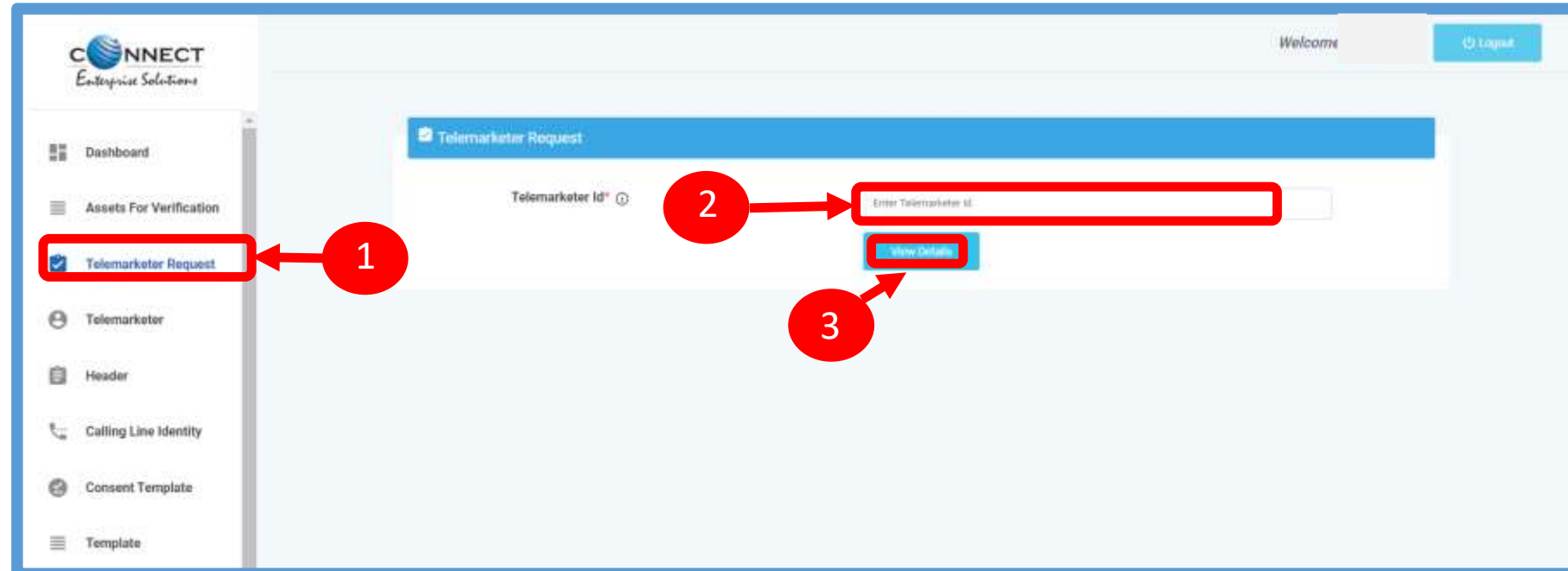
ENTITY – TELEMARKETER REQUEST

TELEMARKETER REQUEST – TM ID SUBMISSION

1 Click **Telemarketer Request** on the left panel to register Telemarketer with Entity.

2 Enter **Telemarketer ID**.

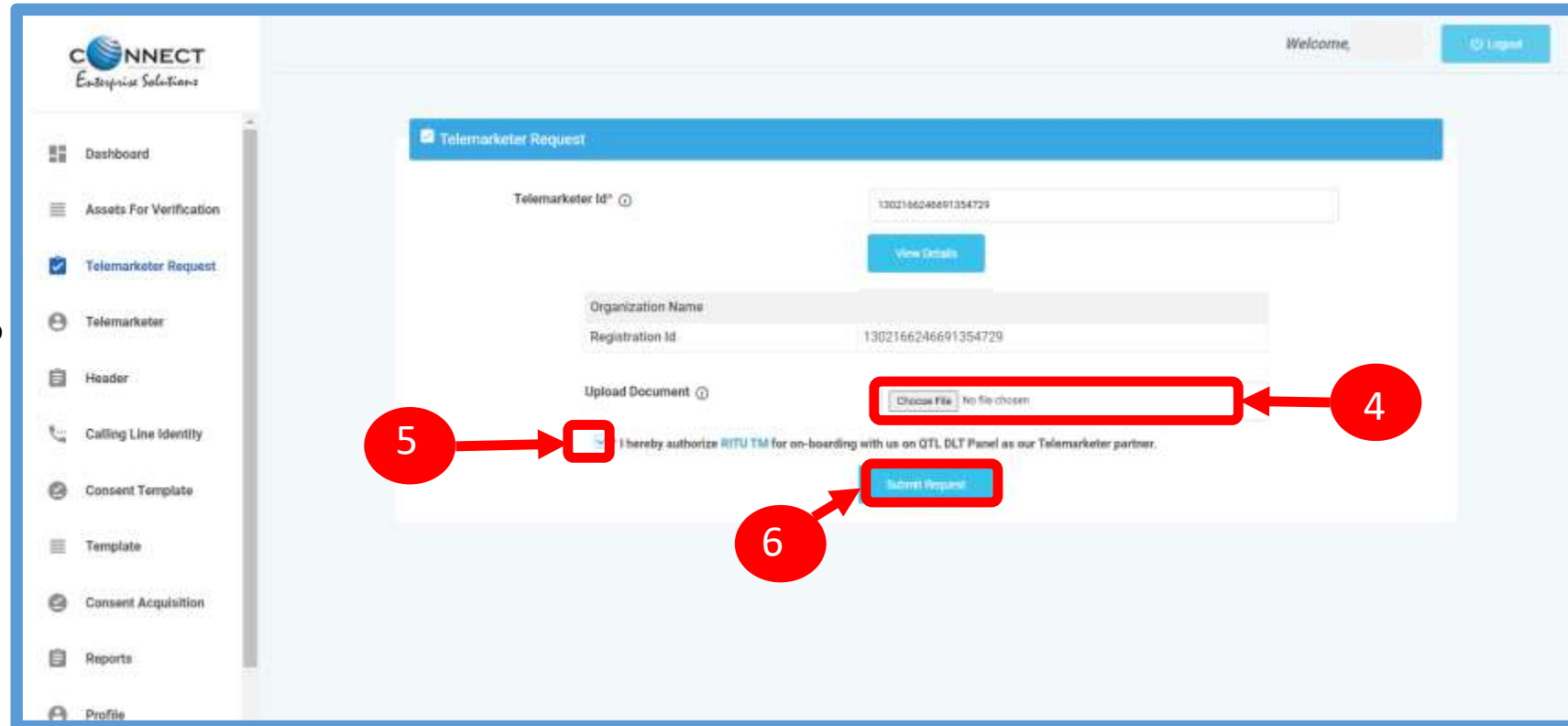
3 Click on **view details**



The screenshot displays the CONNECT Enterprise Solutions web application. On the left, a navigation menu lists several options: Dashboard, Assets For Verification, Telemarketer Request (highlighted with a red box and arrow labeled '1'), Telemarketer, Header, Calling Line Identity, Consent Template, and Template. The main content area is titled 'Telemarketer Request' and contains a form. The form has a label 'Telemarketer ID*' followed by a text input field (highlighted with a red box and arrow labeled '2') and a 'View Details' button (highlighted with a red box and arrow labeled '3'). The top right of the interface shows a 'Welcome' message and a 'Logout' button.

TELEMARKETER REQUEST – REQUEST SUBMISSION

- 4 Upload the Authorized document
- 5 Check the **Box** authorizing the Telemarketer to be associated for doing commercial communication activities.
- 6 Click on **Submit Request** and wait for Telemarketer's approval



The screenshot shows the 'Telemarketer Request' form in the CONNECT Enterprise Solutions interface. The form includes the following fields and buttons:

- Telemarketer Id:** 1302166246691354729
- View Details:** Button
- Organization Name:** [Redacted]
- Registration Id:** 1302166246691354729
- Upload Document:** Section with a 'Choose File' button and 'No file chosen' text.
- Authorization:** A checkbox labeled 'I hereby authorize RITU TM for on-boarding with us on QTL DLT Panel as our Telemarketer partner.'
- Submit Request:** Button

Red circles and arrows indicate the steps:

- 4: Points to the 'Choose File' button in the 'Upload Document' section.
- 5: Points to the authorization checkbox.
- 6: Points to the 'Submit Request' button.

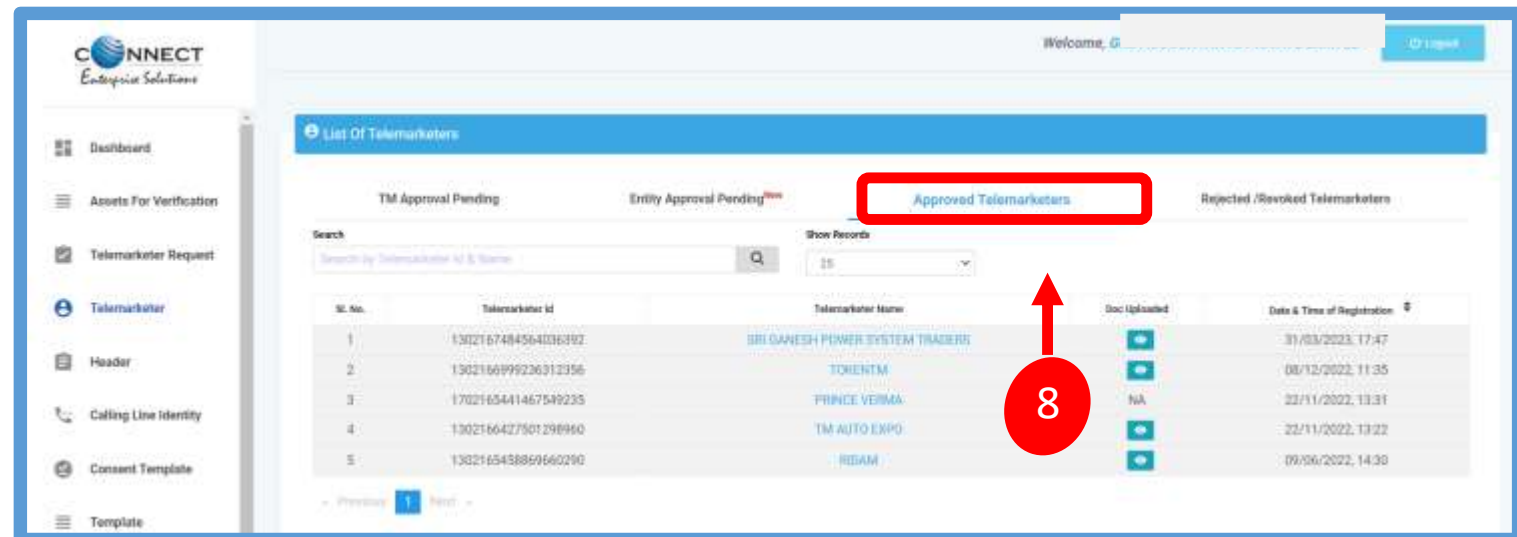
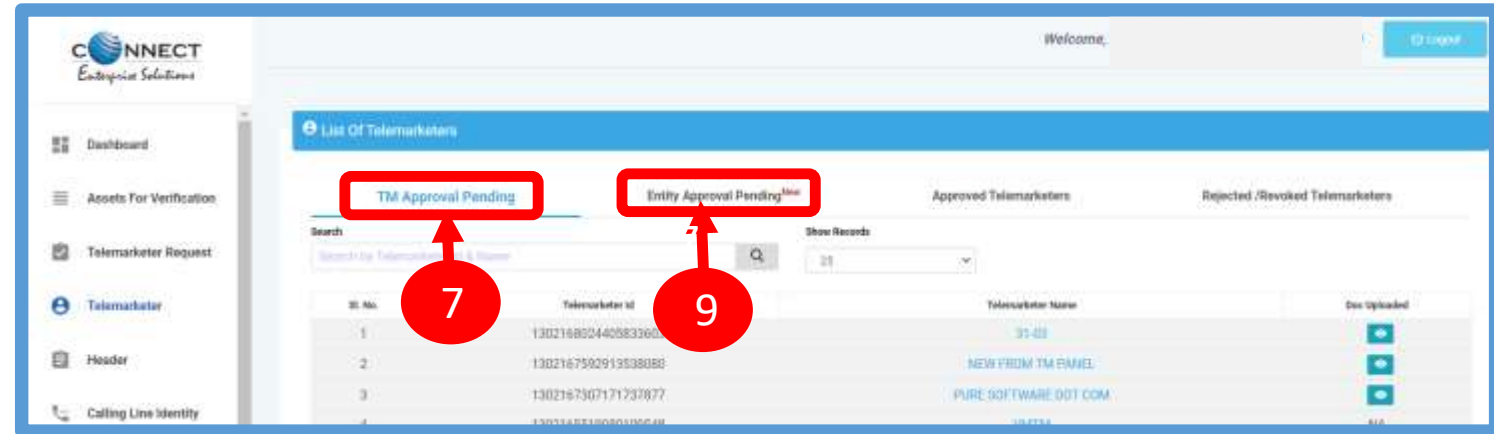
TELEMARKETER REQUEST – REQUEST STATUS

7 Once the request is submitted it can be viewed in the TM Approval Pending section.

Entity Approval Pending Section Click on the **Entity Approval Pending** Tab the tab has pending Telemarketers that are waiting for approval from the Entity.

As per the action taken it will move into Approved or Rejected tab.

9 Once the request is approved by the Telemarketer it can be viewed in the **Approved Telemarketers** section.

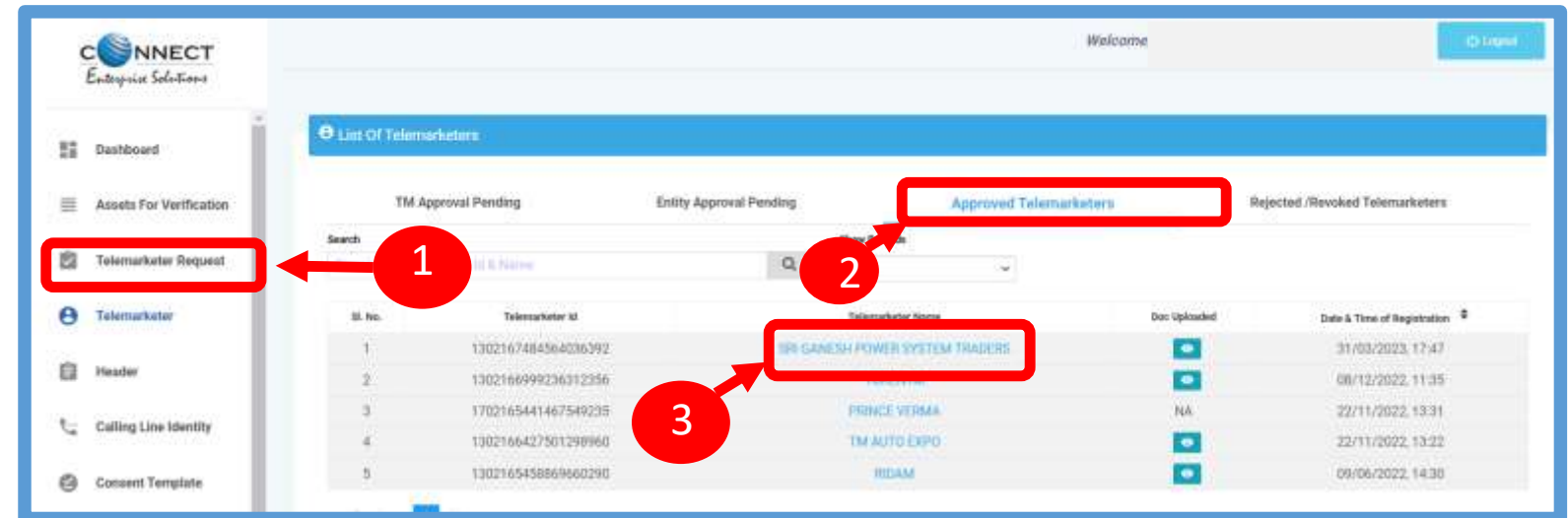


ENTITY-TELEMARKETER REVOCATION

ENTITY-TELEMARKETER RELATIONSHIP REVOCATION

To terminate a business relationship between an Entity and a Telemarketer Revoke function is available on the Entity Panel.

- 1 Select the **Telemarketer** tab from the side bar.
- 2 Go to the **Approved Telemarketer** section .
- 3 Click on the **Name of the Telemarketer** with whom you want to terminate the relationship.
- 4 **Telemarketer details** will be displayed and there will be Revoke button to terminate the business relationship.
- 5 Click on the **Revoke** button



ENTITY –TELEMARKETER REVOCATION CONFIRMATION

6

On clicking the Revoke button a page opens, provide the relevant **Remarks** for revocation.

7

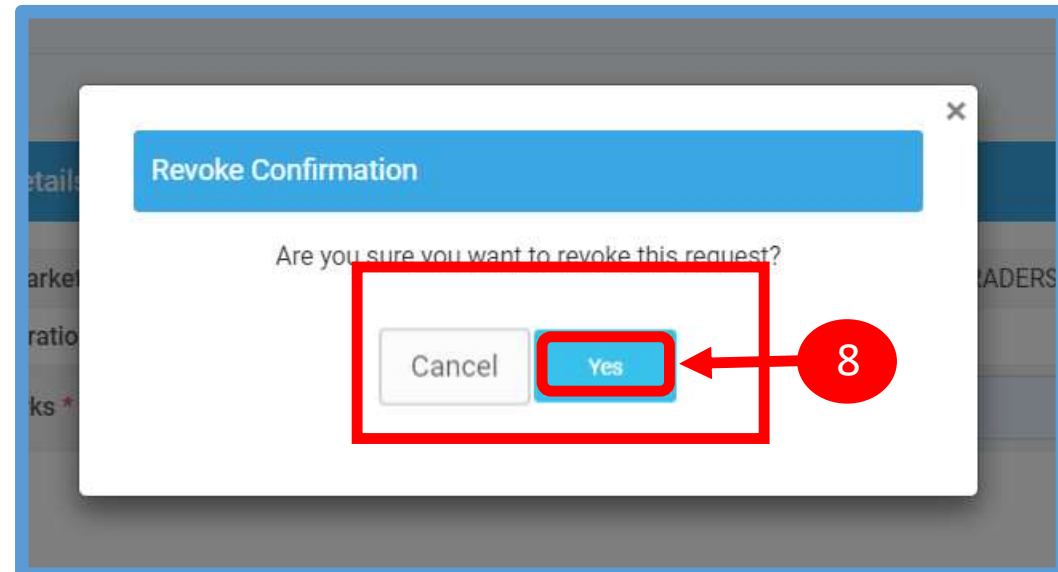
Press **Revoke** button after providing remarks.

8

A **pop-up message** will be displayed to confirm the Revocation process. Press **Yes** to confirm the action or press cancel to stop the action.



The screenshot shows the 'Telemarketer Details' form. The 'Telemarketer Name' field is highlighted with a red box and labeled with a red circle '6'. The 'Registration Id' field contains the value '1302167484564036392'. The 'Remarks' field contains the text 'wdswer'. The 'Revoke' button is highlighted with a red box and labeled with a red circle '7'.

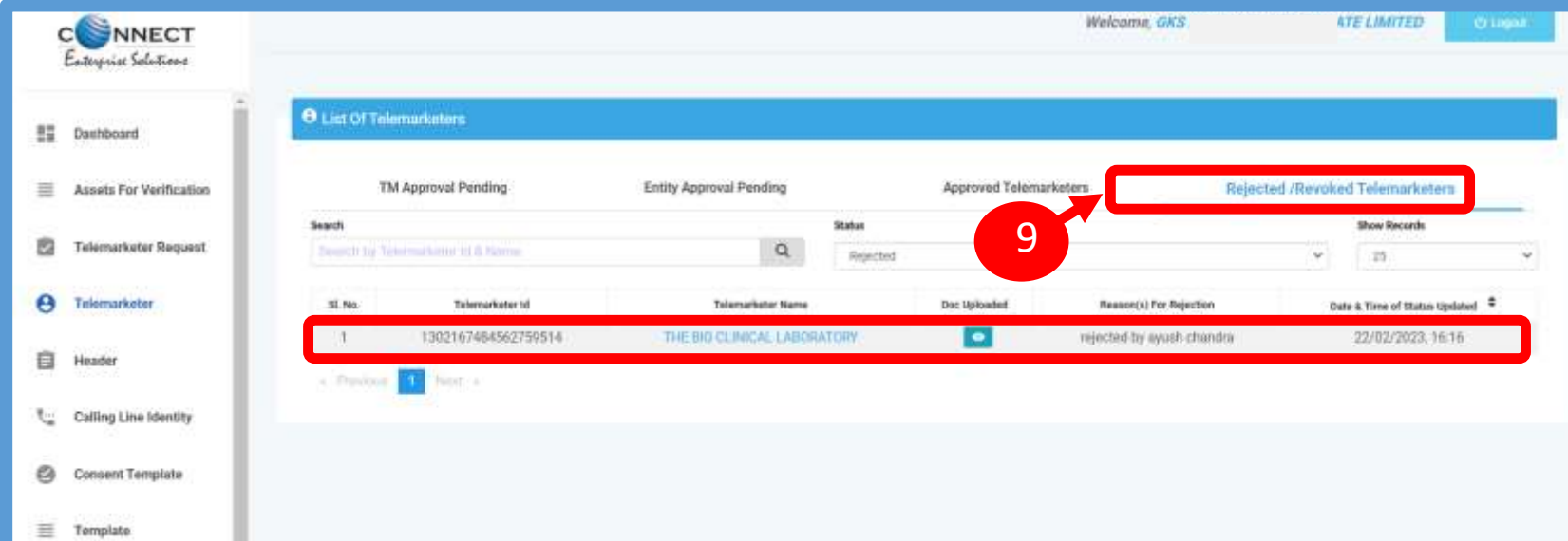


The screenshot shows a 'Revoke Confirmation' pop-up message. The message asks 'Are you sure you want to revoke this request?'. The 'Yes' button is highlighted with a red box and labeled with a red circle '8'.

ENTITY –TELEMARKETER REVOCATION STATUS

9

The business relationship between the Telemarketer and the Entity will be terminated and the entry will be visible on the **Rejected/Revoked Telemarketers** section.



CONNECT Enterprise Solutions

Welcome, GKS ATE LIMITED Logout

List Of Telemarketers

TM Approval Pending Entity Approval Pending Approved Telemarketers **Rejected /Revoked Telemarketers**

Search: Search by Telemarketer Id & Name [Search Icon]

Status: Rejected [Dropdown Arrow] Show Records: 25 [Dropdown Arrow]

Sl. No.	Telemarketer Id	Telemarketer Name	Doc Uploaded	Reason(s) For Rejection	Date & Time of Status Updated
1	1302167484562759514	THE BIO CLINICAL LABORATORY	[Document Icon]	rejected by ayush chandra	22/02/2023, 16:16

Previous 1 Next

HEADER

P – Promotional -

Messages which are purely promotional in nature send to all the prospects in the database by an Entity basis on there preferences. Ex : All kind of Promotional messages.

O – Others- Includes Transactional, Service Implicit and Service Explicit messages.

(Transactional - Essential messages related to transaction. Ex: OTP.

Service Implicit - Service messages that are ought to be sent basis on the business relation with the customer. Ex : Service Alert Messages

Service Explicit - Service messages that are send by the Entity which are promotional in nature but send with prior consent. Ex : New offers for the Entity)

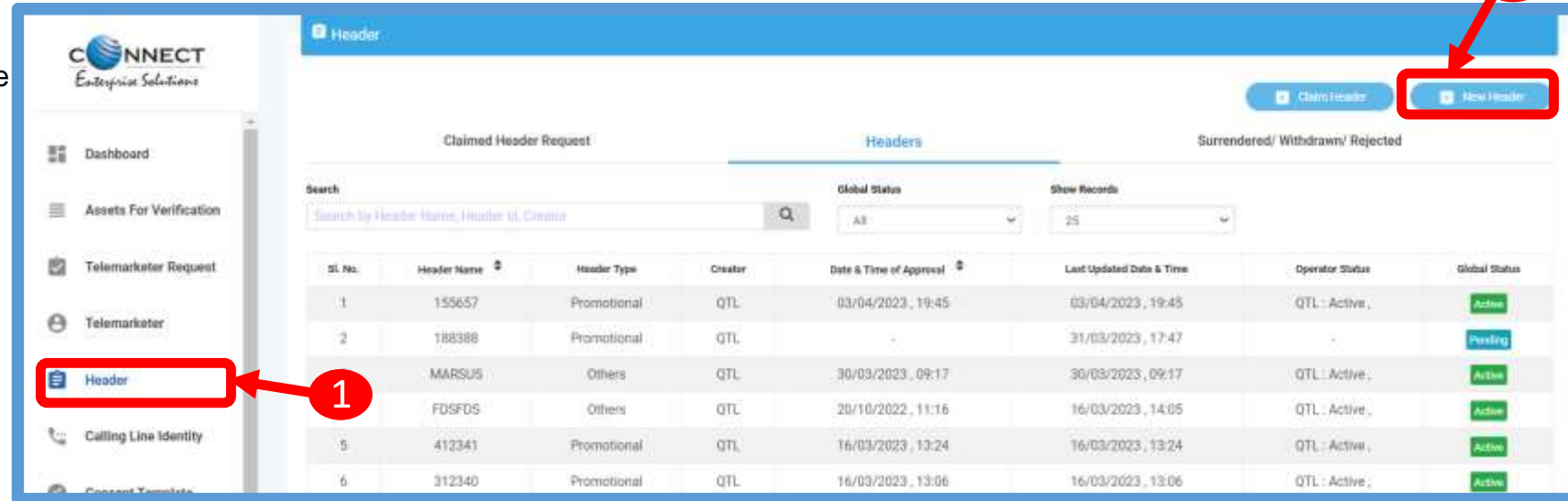
HEADER CREATION – HEADER PAGE

1

Click **Header** on left navigation bar to see the detailed view of all the Headers.

2

Click **New Header** to create Header(s) request. User can create 20 Header request in one go.



The screenshot displays the 'Header' management interface. On the left, the navigation menu includes 'Dashboard', 'Assets For Verification', 'Telemarketer Request', 'Telemarketer', 'Header' (highlighted), 'Calling Line Identity', and 'Consent Template'. The main area is titled 'Header' and contains a table of header requests. The table has columns for 'Sl. No.', 'Header Name', 'Header Type', 'Creator', 'Date & Time of Approval', 'Last Updated Date & Time', 'Operator Status', and 'Global Status'. The 'Global Status' column shows 'Active' or 'Pending' with corresponding colored buttons. In the top right corner, there are buttons for 'Claim Header' and 'New Header' (highlighted with a red box and arrow labeled '2').

Sl. No.	Header Name	Header Type	Creator	Date & Time of Approval	Last Updated Date & Time	Operator Status	Global Status
1	155657	Promotional	QTL	03/04/2023, 19:45	03/04/2023, 19:45	QTL : Active ,	Active
2	188388	Promotional	QTL	-	31/03/2023, 17:47	-	Pending
3	MARSUS	Others	QTL	30/03/2023, 09:17	30/03/2023, 09:17	QTL : Active ,	Active
4	FDSFDS	Others	QTL	20/10/2022, 11:16	16/03/2023, 14:05	QTL : Active ,	Active
5	412341	Promotional	QTL	16/03/2023, 13:24	16/03/2023, 13:24	QTL : Active ,	Active
6	312340	Promotional	QTL	16/03/2023, 13:06	16/03/2023, 13:06	QTL : Active ,	Active

HEADER CREATION – TYPE & CATEGORY SELECTION

3

Click **Header Type** and choose the type of Header from the list mentioned.

- Promotional
- Other



Header Type depends on the type of the commercial communication message that needs to be sent with that header. (Eg: Promotional for promotional messages and for all other select the Other type)

4

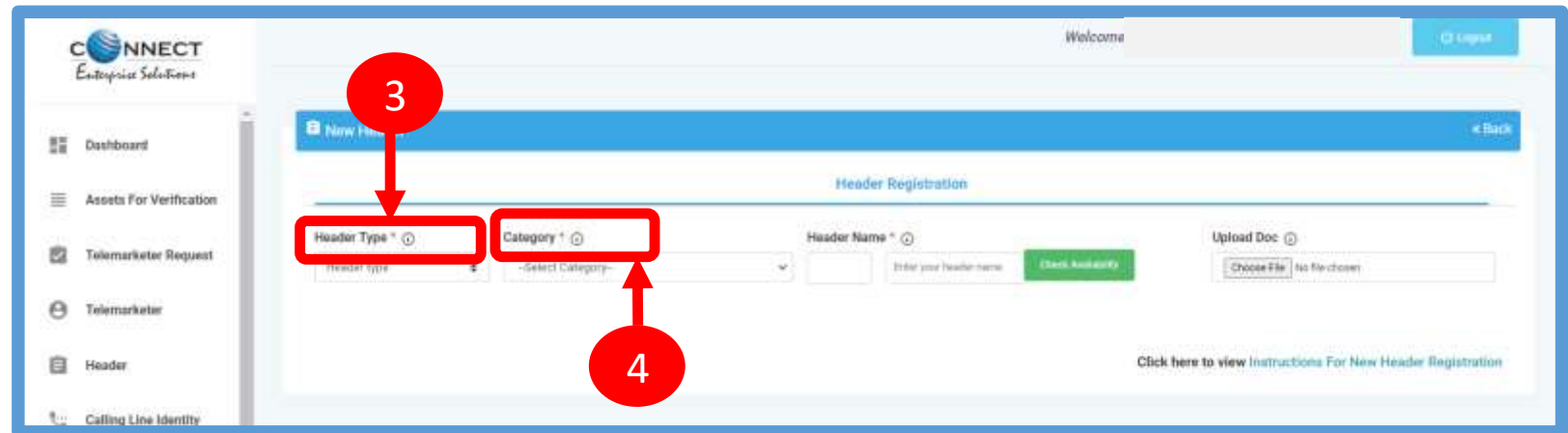
Select the **Category** from the dropdown as per your business requirement.



There are 9 number of categories listed in the dropdown list those entities who does not find their business can choose "Other" in the category to create the header.



In case the Header Type is "Other" then category is optional but for Promotional category is mandatory.



HEADER CREATION - VALIDATION TABLE

Header type	Entity Type	Type	Length	Instructions
Promotional (P)	All	Numeric	6 Characters	Allowed
		Alpha		Not Allowed
Other (O)	Govt.	Numeric	3-8 Characters	Starts with 1 , length = 6 not allowed
		Alpha	3-6 Characters	Allowed
	Non-Govt	Numeric		Not Allowed
		Alpha	3-6 characters	Allowed

Table – 1

HEADER CREATION – NAME, AVAILABILITY & DOC UPLOAD

5 Type in the desired **Header Name** according to your Header Type/Brand Name or business requirement.

Header Name will be decided by the Entity basis on their business requirements and Entity name. (Eg: Entity Name: HDFC BANK, Header Name: HDFCBK)

*Refer **Table 1** to understand the validations and possible type of headers that can be created under various categories for Govt and Non-Govt entities.*

6 Click **Check Availability** to check the availability of header name. If available proceed with next step. If not available follow the claim process.

7 Upload relevant document related to header by clicking on **Choose File** button.

8 Click on **Add More Header** button to add more header request. User can create up to 20 header request at a time.



The screenshot shows the 'New Header' registration interface. On the left is a sidebar menu with options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header, Calling Line Identity, Consent Template, and Template. The main content area is titled 'New Header' and 'Header Registration'. It contains several input fields: 'Header Type' (set to 'Promotional'), 'Category' (set to 'Education'), and 'Header Name' (with a red box around it and callout 5). Below these are 'Check Availability' (callout 6) and 'Upload Doc' (with a 'Choose File' button and callout 7). At the bottom, there is an 'Add More Header' button (callout 8) and a 'Submit' button. A link at the bottom right says 'Click here to view Instructions For New Header Registration'.

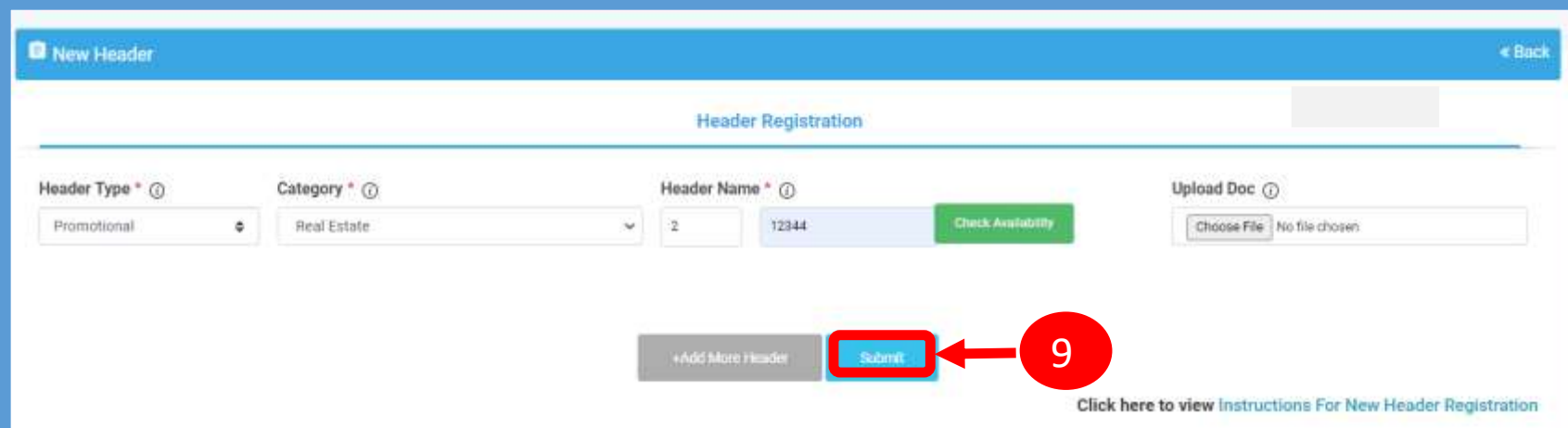
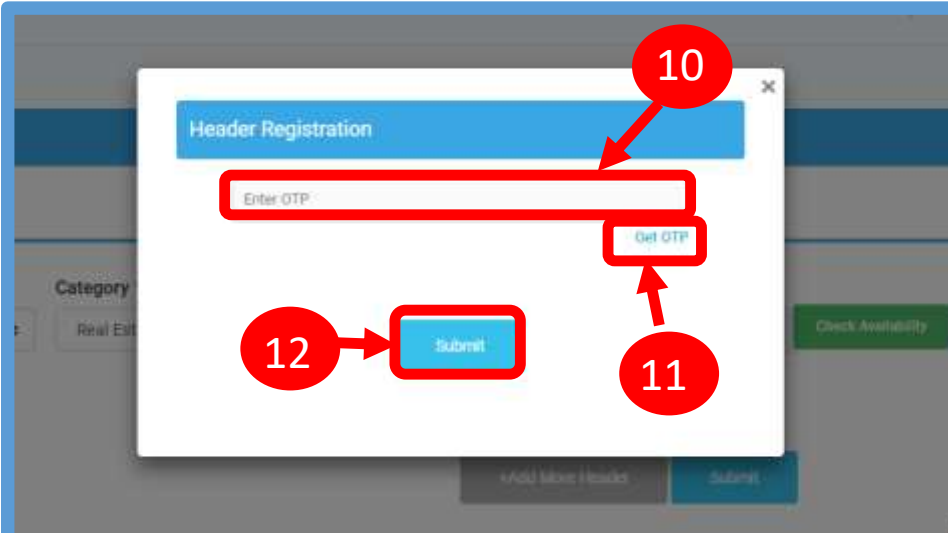
HEADER CREATION – OTP VERIFICATION & REQUEST SUBMISSION

9 Click on **Submit** button to submit the header request.

10 An **OTP box** will appear.

11 Click on the **Get OTP** button. Instantly an One Time Password (OTP) will be send to the registered Mobile and Email Id. Type the OTP in the given box

12 Click on the **Submit** button. On successful submission of request a message will appear on the top of the screen.

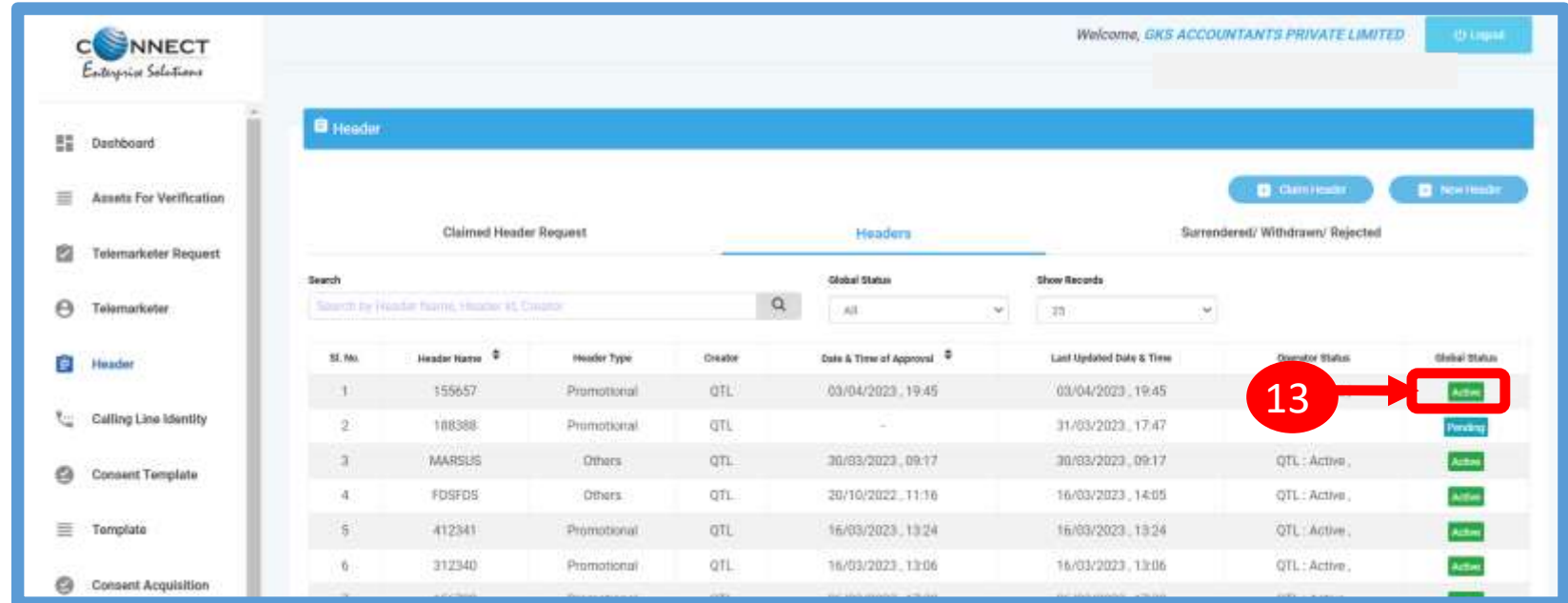



HEADER CREATION – HEADER STATUS

13

Once you submit the header request it would show in the header section with status as **Pending**.

Once the Operator approves the header the status will change to **Active**.



The screenshot displays the 'Header' management section of the CONNECT Enterprise Solutions interface. The left sidebar contains navigation options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header (selected), Calling Line Identity, Consent Template, Template, and Consent Acquisition. The main content area shows a table of header requests. The table has the following columns: Sl. No, Header Name, Header Type, Creator, Date & Time of Approval, Last Updated Date & Time, Operator Status, and Global Status. The first row of the table is highlighted, and a red circle with the number 13 points to the 'Global Status' column, which shows 'Active'.

Sl. No	Header Name	Header Type	Creator	Date & Time of Approval	Last Updated Date & Time	Operator Status	Global Status
1	155657	Promotional	QTL	03/04/2023, 19:45	03/04/2023, 19:45	QTL : Active	Active
2	108388	Promotional	QTL	-	31/03/2023, 17:47	QTL : Active	Pending
3	MARSUS	Others	QTL	30/03/2023, 09:17	30/03/2023, 09:17	QTL : Active	Active
4	FDSFDS	Others	QTL	20/10/2022, 11:16	16/03/2023, 14:05	QTL : Active	Active
5	412341	Promotional	QTL	16/03/2023, 13:24	16/03/2023, 13:24	QTL : Active	Active
6	312340	Promotional	QTL	16/03/2023, 13:06	16/03/2023, 13:06	QTL : Active	Active

STATUS – OTHER TSP’S HEADER

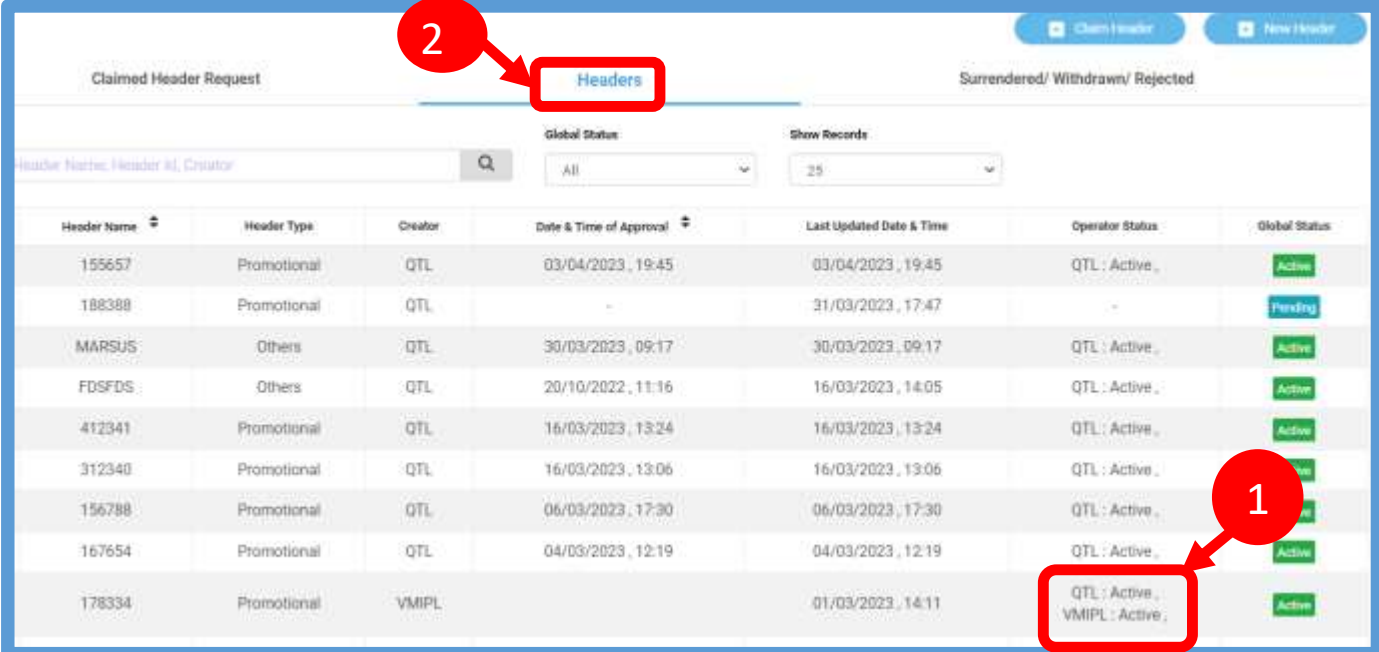
1

All the header registered with other TSP will reflect In Header TAB with Global status and operator wise status

2

Its not active on VMIPL till the time operator approves the same

Once action taken by the VMIPL it will reflect under operator status.



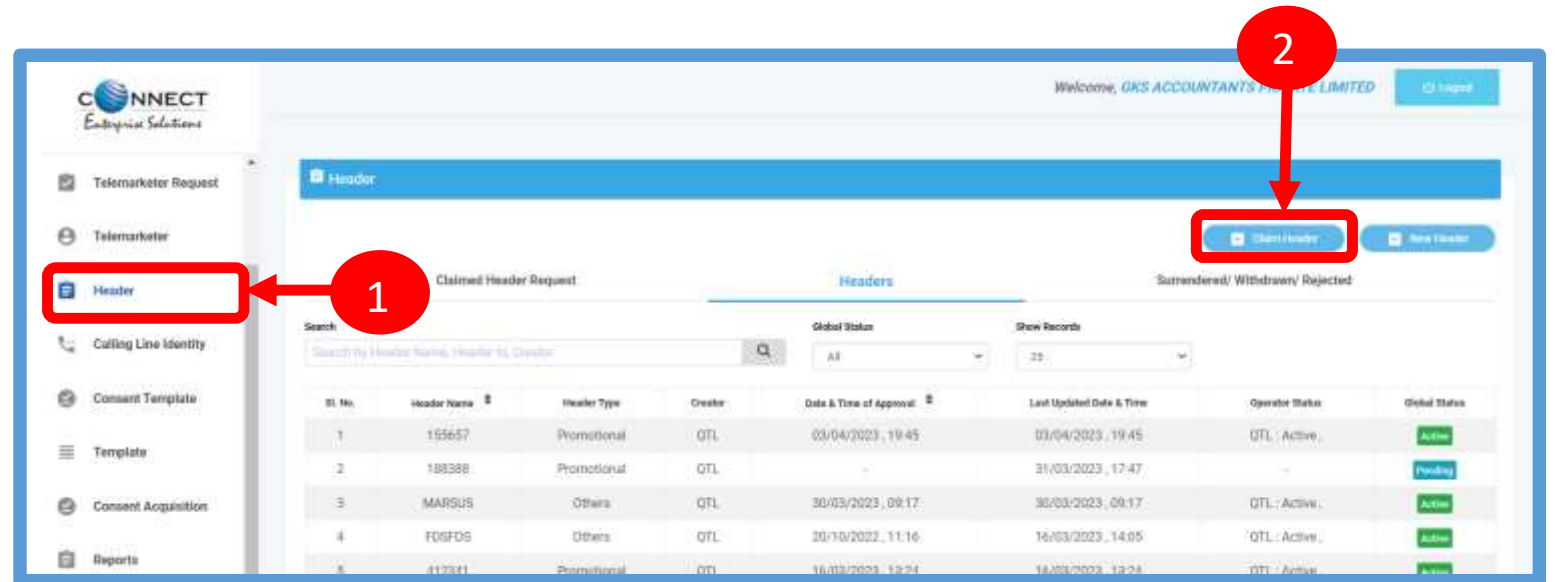
Header Name	Header Type	Creator	Date & Time of Approval	Last Updated Date & Time	Operator Status	Global Status
155657	Promotional	QTL	03/04/2023, 19:45	03/04/2023, 19:45	QTL : Active	Active
188388	Promotional	QTL	-	31/03/2023, 17:47	-	Pending
MARSUS	Others	QTL	30/03/2023, 09:17	30/03/2023, 09:17	QTL : Active	Active
FDSFDS	Others	QTL	20/10/2022, 11:16	16/03/2023, 14:05	QTL : Active	Active
412341	Promotional	QTL	16/03/2023, 13:24	16/03/2023, 13:24	QTL : Active	Active
312340	Promotional	QTL	16/03/2023, 13:06	16/03/2023, 13:06	QTL : Active	Active
156788	Promotional	QTL	06/03/2023, 17:30	06/03/2023, 17:30	QTL : Active	Active
167654	Promotional	QTL	04/03/2023, 12:19	04/03/2023, 12:19	QTL : Active	Active
178334	Promotional	VMIPL		01/03/2023, 14:11	QTL : Active, VMIPL : Active	Active

CLAIM HEADER

CLAIM HEADER – CLAIM INITIATION

1 Click **Header** on left navigation bar and go to the Header Page.

2 Click **Claim Header** to go to Header claim request page



CLAIM HEADER – REQUEST SUBMISSION

- 3 Type the Header that needs to be claimed in the **Header Name** section

- 4 Click **Claim** button , a claim form will appear.

The screenshot shows a web form titled "Claim Header" with a blue header bar containing a back arrow and the text "Claim Header". Below the header, the form has a section labeled "Claim Header" with a sub-label "Header Name * ⓘ". To the right of this label is a text input field with the placeholder text "Enter your header name". A red circle with the number "3" and an arrow points to this input field. Below the input field is a blue button labeled "Claim". A red circle with the number "4" and an arrow points to this button. At the bottom left of the form, the word "Instructions:" is visible.

CLAIM HEADER – FILL CLAIM FORM

Claim Form will contain details related to claimed Header

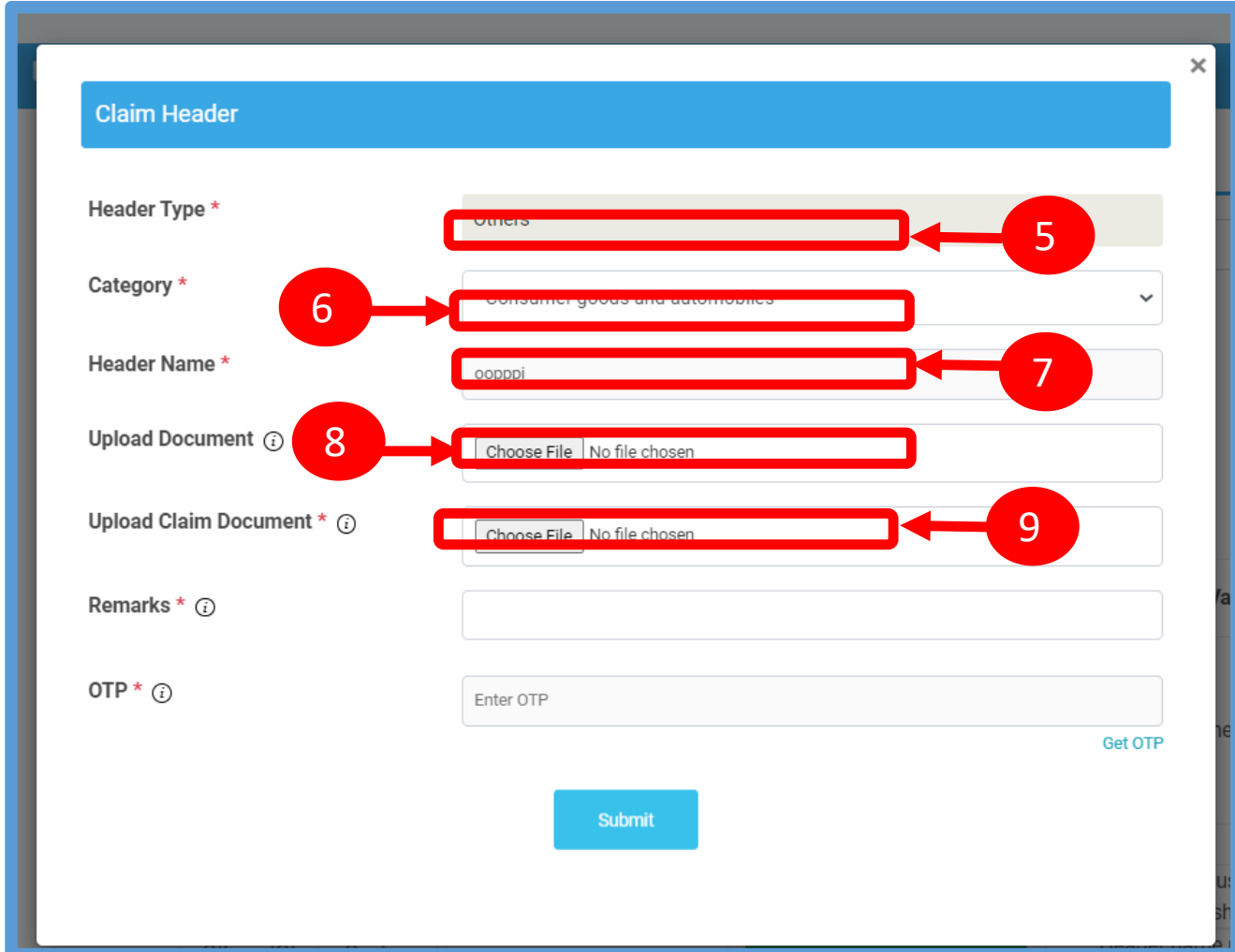
5 **Header Type** will be auto fetched in the Claim Form.

6 **Category** also will be auto fetched but it is editable if the Header Type is “Others”..

7 **Header Name** will also appear as per the input given in the initially.

8 In the **Upload Document** section, upload the relevant document related to Header

9 In the **Upload Claim Document** section, upload the relevant document proving the Entity ownership of the Header.



The screenshot shows a web form titled "Claim Header" with the following fields and annotations:

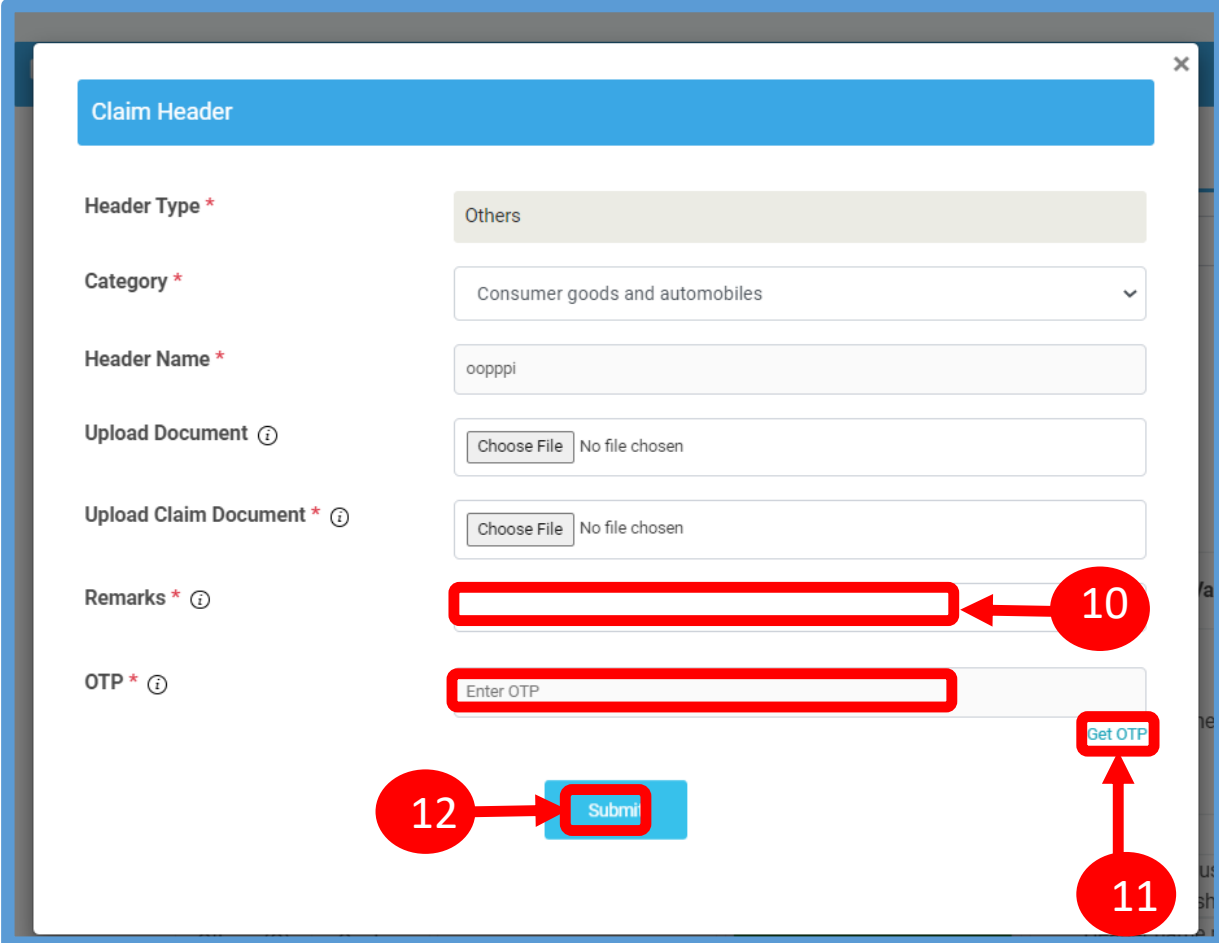
- Header Type ***: A dropdown menu with "Others" selected. A red circle with the number 5 and an arrow points to this field.
- Category ***: A dropdown menu with "Consumer goods and automobiles" selected. A red circle with the number 6 and an arrow points to this field.
- Header Name ***: A text input field containing "ooppoi". A red circle with the number 7 and an arrow points to this field.
- Upload Document ⓘ**: A file upload section with a "Choose File" button and "No file chosen" text. A red circle with the number 8 and an arrow points to this section.
- Upload Claim Document * ⓘ**: A file upload section with a "Choose File" button and "No file chosen" text. A red circle with the number 9 and an arrow points to this section.
- Remarks * ⓘ**: A text input field.
- OTP * ⓘ**: A text input field with the placeholder "Enter OTP". A "Get OTP" link is located to the right of the field.
- Submit**: A blue button at the bottom of the form.

CLAIM HEADER – REMARKS/OTP/ SUBMISSION OF CLAIM

10 Fill the **Remarks/Reason** to claim the Header.

11 Click **Get OTP** and you will receive the password on the authorized person's registered mobile number. Type the OTP in the space provided

12 Press **Submit** button to send the request to Operator.



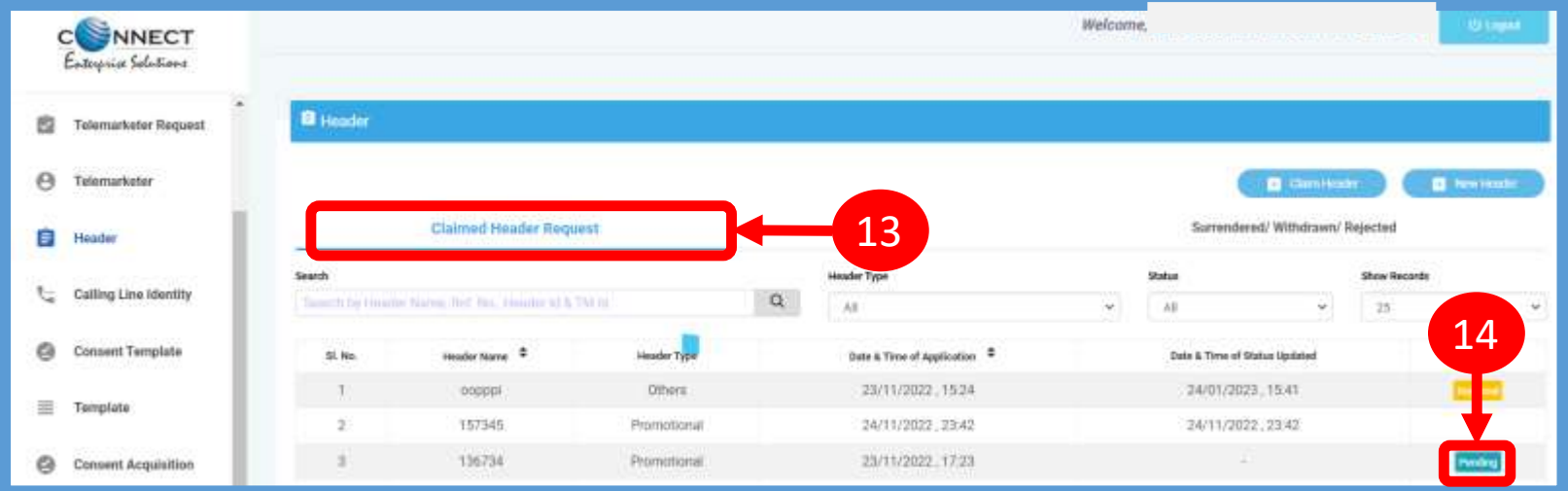
The screenshot shows a web form titled "Claim Header" with the following fields and annotations:

- Header Type ***: A dropdown menu with "Others" selected.
- Category ***: A dropdown menu with "Consumer goods and automobiles" selected.
- Header Name ***: A text input field containing "oopppi".
- Upload Document ⓘ**: A file upload area with a "Choose File" button and "No file chosen" text.
- Upload Claim Document * ⓘ**: A file upload area with a "Choose File" button and "No file chosen" text.
- Remarks * ⓘ**: A text input field. A red box and arrow labeled **10** point to this field.
- OTP * ⓘ**: A text input field with the placeholder "Enter OTP".
- Get OTP**: A button. A red box and arrow labeled **11** point to this button.
- Submit**: A blue button. A red box and arrow labeled **12** point to this button.

CLAIM HEADER – REQUEST STATUS

13 All the Claimed Headers will be visible in the “**Claimed Header Request**”.

14 Claimed Header request will be in **Pending** status subject to approval from the Operator. Once the Operator approves and the claim process gets complete, the status of the claimed headers will turn to **Active**.



Header

Claimed Header Request

Search: Search by Header Name, Ref No, Header ID & TM ID

Header Type: All

Status: All

Show Records: 25

Sl No.	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	oopppl	Others	23/11/2022, 15:24	24/01/2023, 15:41	Pending
2	157345	Promotional	24/11/2022, 23:42	24/11/2022, 23:42	Active
3	136734	Promotional	23/11/2022, 17:23		Active

HEADER – SURRENDER

HEADER SURRENDER – INITIATION

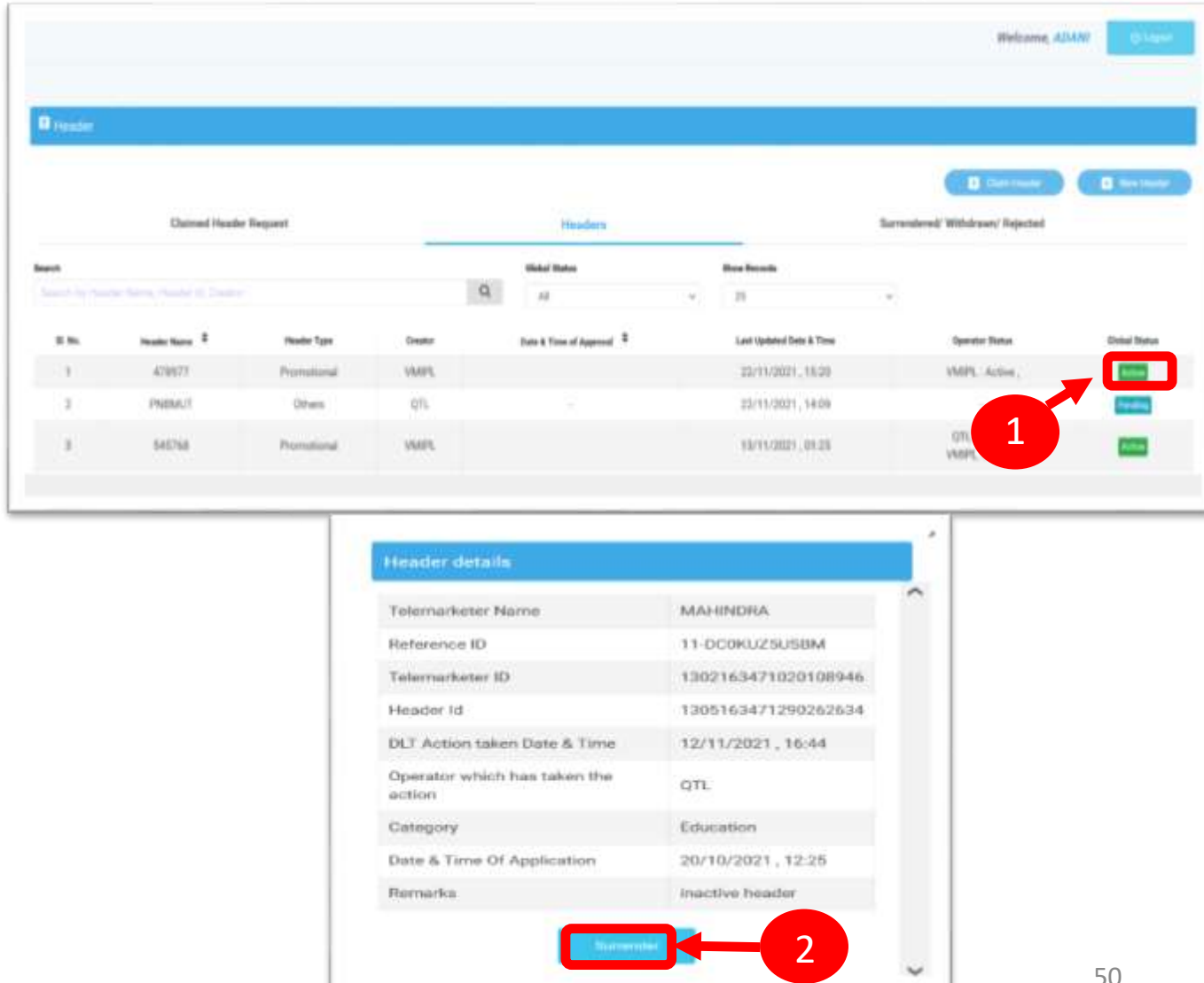
If the Entity does not want to send commercial communication with a particular header. Then they can surrender the same. Please follow the below mentioned process.

1

Click **Active** to surrender the header.

2

Click **Surrender** and confirm that you want to surrender your header.



Header details

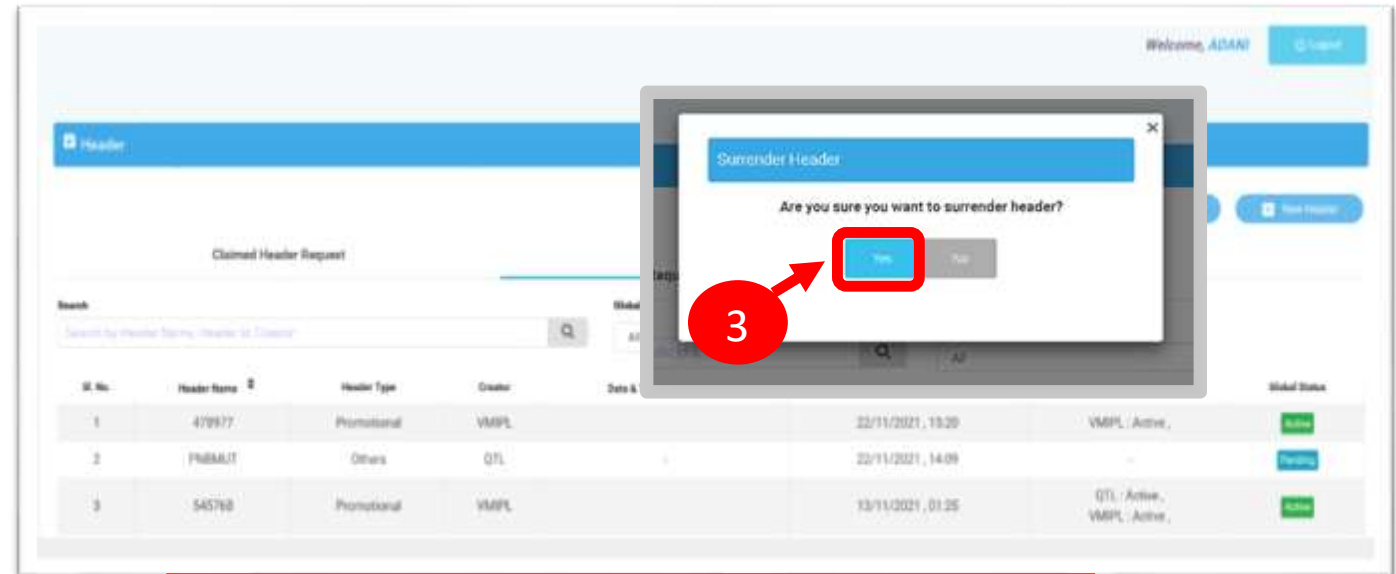
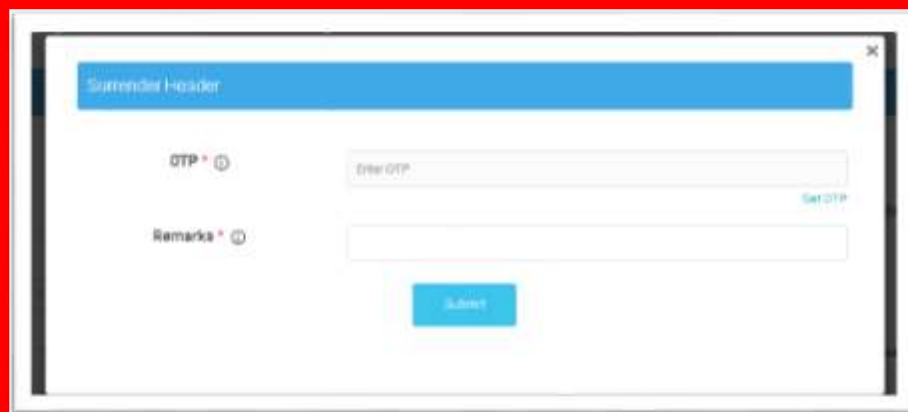
Telmarketer Name	MAHINDRA
Reference ID	11-DC0KU25USBM
Telmarketer ID	1302163471020108946
Header Id	1305163471290262634
DLT Action taken Date & Time	12/11/2021 , 16:44
Operator which has taken the action	QTL
Category	Education
Date & Time Of Application	20/10/2021 , 12:25
Remarks	Inactive header

Surrender

HEADER SURRENDER – OTP / CONFIRMATION

3 A Pop-up will appear to confirm the Surrender process, Press **YES** button to confirm.

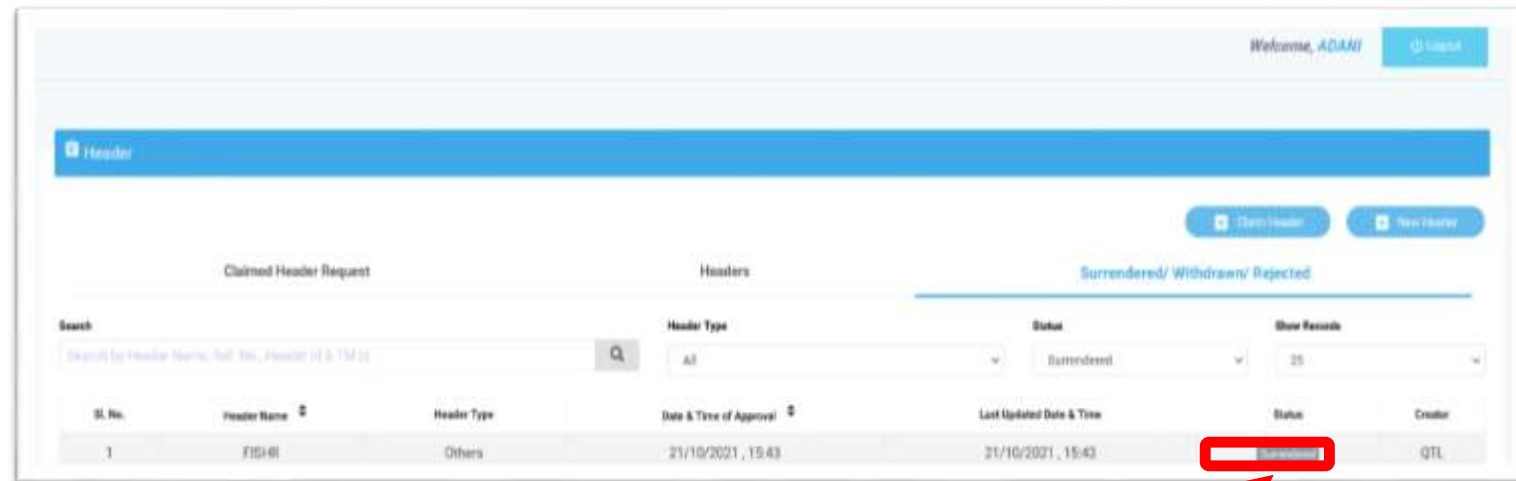
4 Once you confirm the surrender of the header then a pop-up will appear for authentication. Share the **OTP** that you receive on your registered mobile number. Also provide the reason for Surrender in the Remarks section.

HEADER SURRENDER - STATUS

5

The surrendered header entry will appear in the **Surrendered/Withdrawn/Rejected** section.



Header						
Claimed Header Request		Headers		Surrendered/ Withdrawn/ Rejected		
Sl. No.	Header Name	Header Type	Date & Time of Approval	Last Updated Date & Time	Status	Creator
1	FIDH	Others	21/10/2021, 15:43	21/10/2021, 15:43	Surrendered	QTL

5

CONSENT TEMPLATE

CONSENT TEMPLATE – CREATION OF CONSENT TEMPLATE

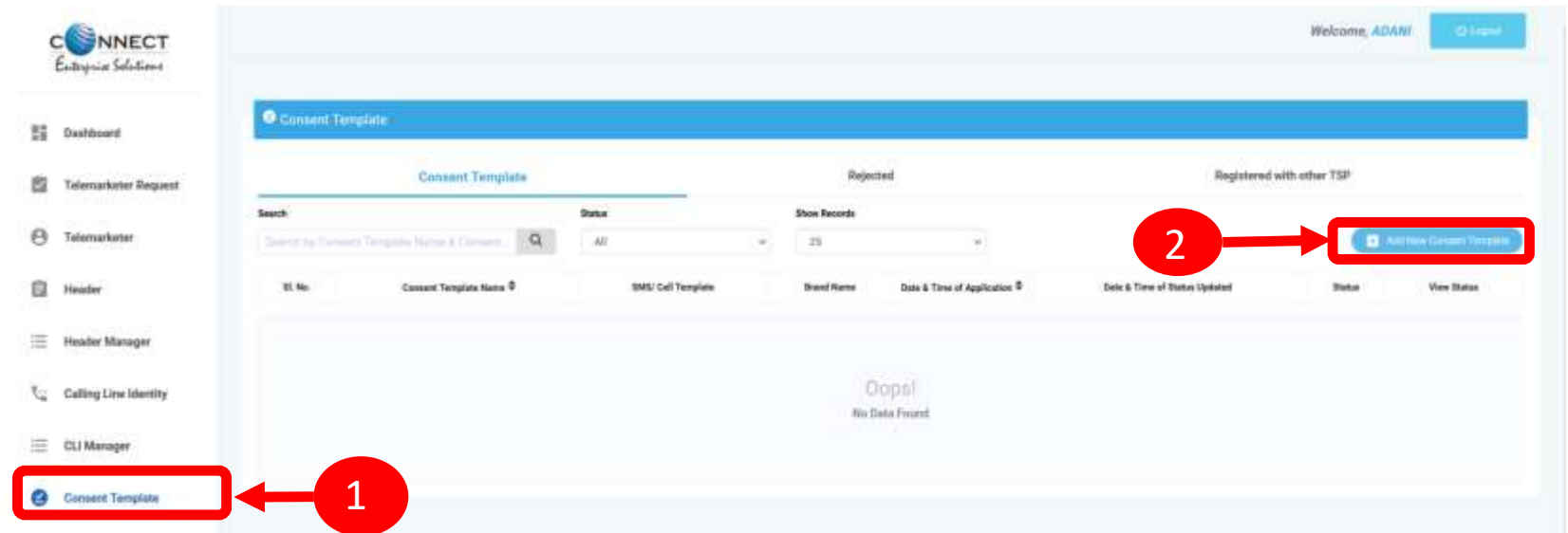
Consent Template is created to acquire prior consent from the customer to send commercial communication which are related to Service or Promotion of Product/Services of an Business Entity.

1

Click on the **Consent Template** on the sidebar to view the details of Consent Templates or to create a New Consent Template.

2

Click on the **Add New Consent Template** button to create a new Consent Template.



CONSENT TEMPLATE – REQUEST SUBMISSION

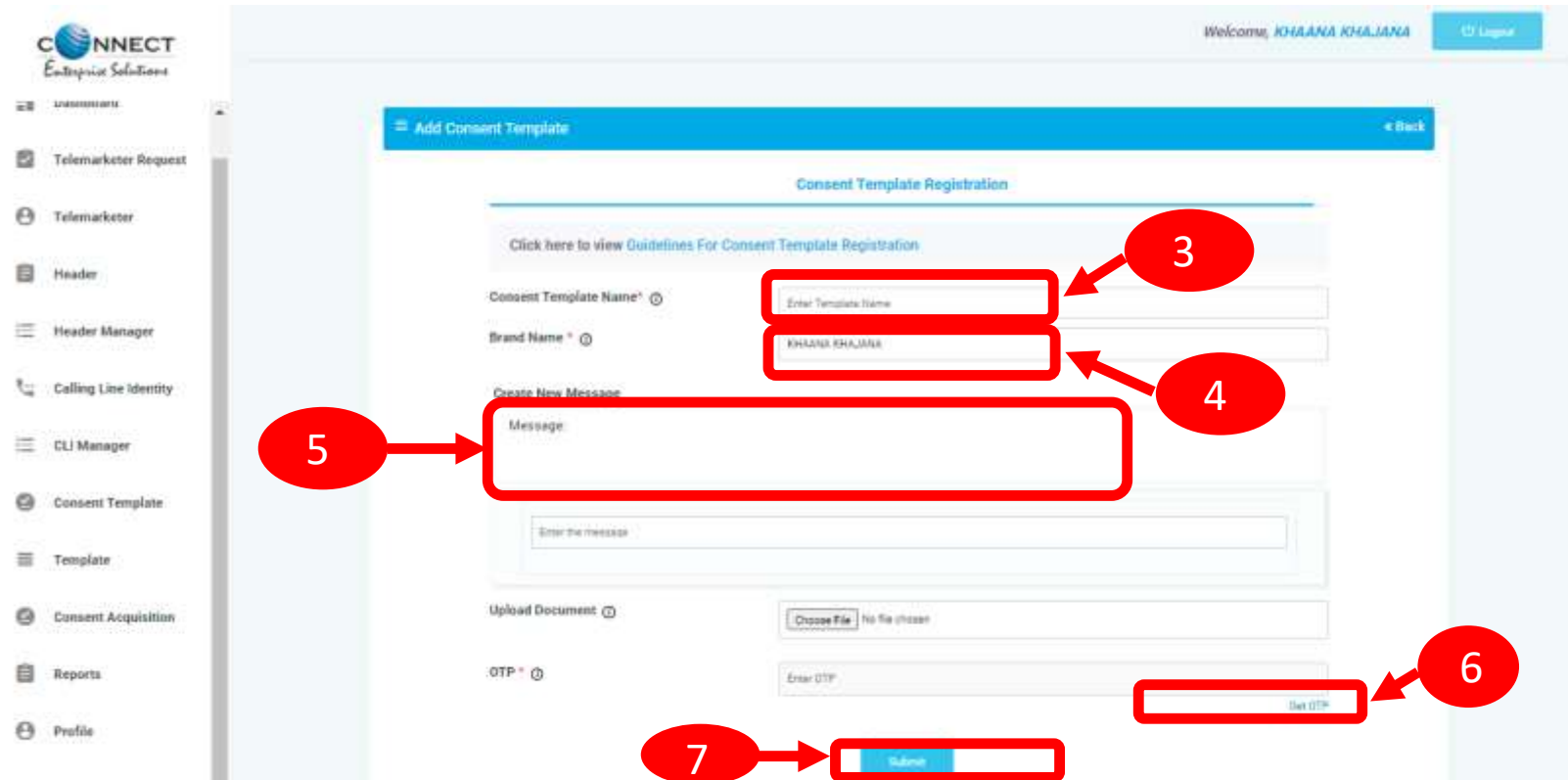
3 To create a New Consent Template, first type a relevant **Consent Template Name** as per the Entity business requirement.

4 In the **Brand Name** column, the data will be auto filled and the company name will appear.

5 To create content for the consent template type the content required in the **Message box**.

6 Once the content is created. Click on the **GET OTP** link, a One Time Password (OTP) will be sent to your registered mobile number. Authenticate the process by typing that OTP in the OTP column.

7 Press **Submit** button to send the request to the Operator for approval.



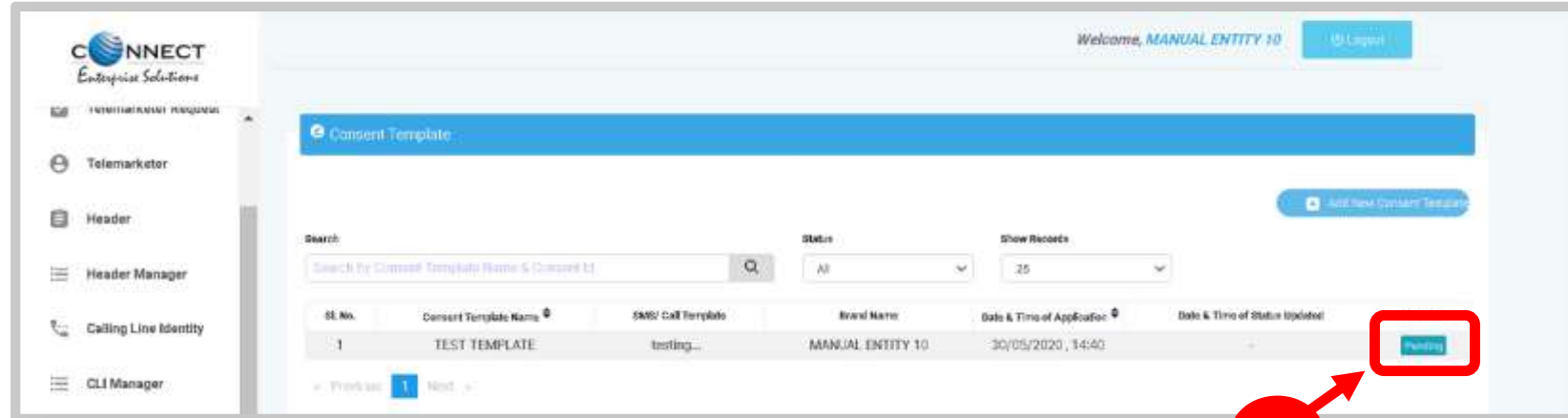
The screenshot shows the 'Add Consent Template' form in the CONNECT Enterprise Solutions interface. The form is titled 'Consent Template Registration' and includes a 'Back' link. It contains the following fields and elements:

- Consent Template Name***: A text input field with a red circle 3 pointing to it.
- Brand Name***: A text input field with a red circle 4 pointing to it.
- Create New Message**: A section with a 'Message' text area and a 'Get OTP' link, with a red circle 5 pointing to the message area.
- Upload Document**: A section with a 'Choose File' button and a 'No file chosen' status.
- OTP***: A text input field with a red circle 6 pointing to it.
- Submit**: A blue button at the bottom right with a red circle 7 pointing to it.

CONSENT TEMPLATE – REQUEST STATUS

8

Once the New Consent Template request is submitted for approval, the entry will be visible on the Consent Template page with status as **Pending**.

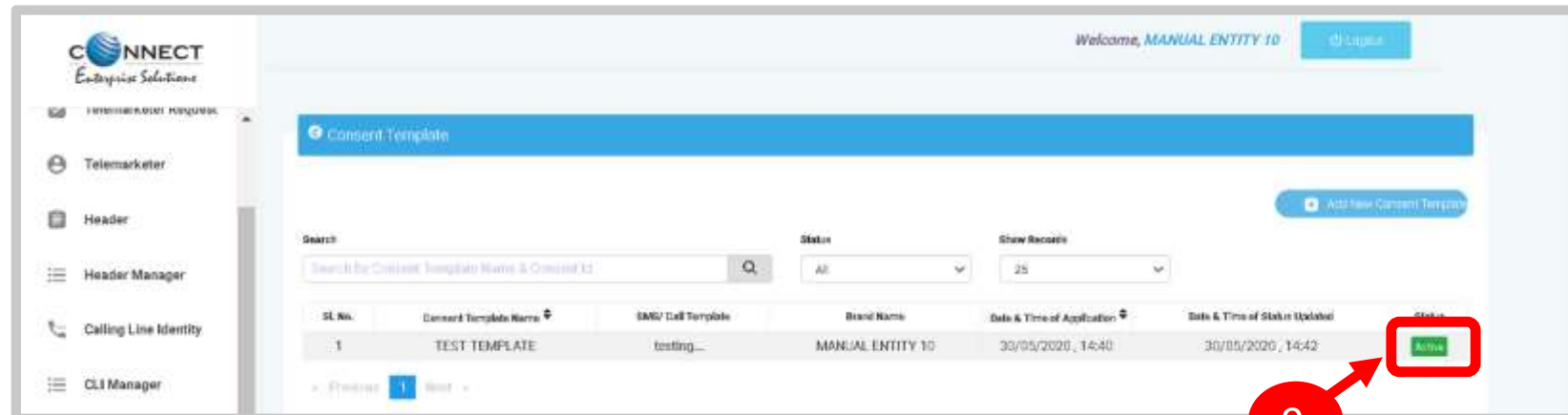


The screenshot shows the 'Consent Template' management interface. On the left is a sidebar with navigation options: Telemarketer, Header, Header Manager, Calling Line Identity, and CLI Manager. The main area has a search bar and filters for Status (set to 'All') and Show Records (set to '25'). A table lists the templates, with the first entry 'TEST TEMPLATE' having a status of 'Pending'. A red box highlights the 'Pending' status, with a red arrow pointing to it from a red circle containing the number 8.

SL No.	Consent Template Name	SNIS/ Call Template	Brand Name	Date & Time of Application	Date & Time of Status Updated	Status
1	TEST TEMPLATE	testing...	MANUAL ENTITY 10	30/05/2020, 14:40		Pending

9

Once the Operator approves the Consent Template the status turns to **Active**.



This screenshot shows the same 'Consent Template' page as above, but the status of the 'TEST TEMPLATE' entry has changed to 'Active'. A red box highlights the 'Active' status, with a red arrow pointing to it from a red circle containing the number 9.

SL No.	Consent Template Name	SNIS/ Call Template	Brand Name	Date & Time of Application	Date & Time of Status Updated	Status
1	TEST TEMPLATE	testing...	MANUAL ENTITY 10	30/05/2020, 14:40	30/05/2020, 14:42	Active

REGISTER – OTHER TSP’S CONSENT TEMPLATE

1

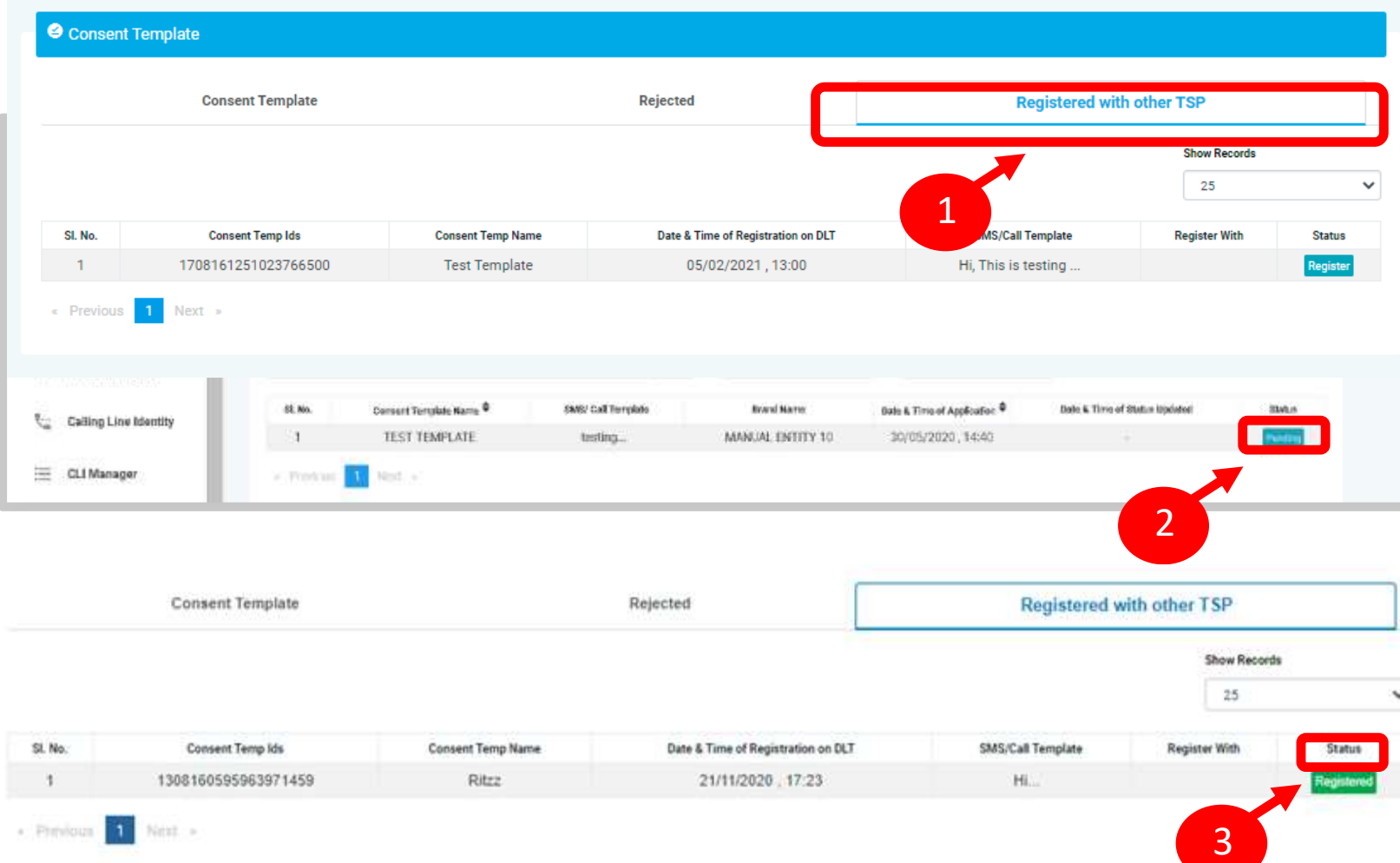
Click on **Registered with other TSP** to view the Consent template registered with other TSP’s.

2

Click on **Register button** to enroll the Consent Template .
Once request submitted, it will be auto approved and status will get changed to **Registered**.

3

Once request submitted it will be auto approved & status turns to **Registered**



The screenshot displays the 'Consent Template' management interface. At the top, there are tabs for 'Consent Template', 'Rejected', and 'Registered with other TSP'. The 'Registered with other TSP' tab is highlighted with a red box and labeled with a red '1'. Below the tabs, there is a table with columns: 'Sl. No.', 'Consent Temp Ids', 'Consent Temp Name', 'Date & Time of Registration on DLT', 'SMS/Call Template', 'Register With', and 'Status'. The first row shows a template with ID '1708161251023766500' and name 'Test Template', registered on '05/02/2021, 13:00' with the text 'Hi, This is testing ...'. A red box highlights the 'Register' button in the 'Status' column, labeled with a red '2'. Below the table, there is a sidebar with 'Calling Line Identity' and 'CLI Manager' options. Another screenshot below shows the same table after the request is approved, with the 'Status' column now displaying 'Registered' in a green box, labeled with a red '3'.

Sl. No.	Consent Temp Ids	Consent Temp Name	Date & Time of Registration on DLT	SMS/Call Template	Register With	Status
1	1708161251023766500	Test Template	05/02/2021, 13:00	Hi, This is testing ...		Register

Sl. No.	Consent Template Name	SMS/ Call Template	Brand Name	Date & Time of Application	Date & Time of Status Updated	Status
1	TEST TEMPLATE	testing...	MANUAL ENTITY 10	30/05/2020, 14:40		Registered

Sl. No.	Consent Temp Ids	Consent Temp Name	Date & Time of Registration on DLT	SMS/Call Template	Register With	Status
1	1308160595963971459	Ritz	21/11/2020, 17:23	Hi...		Registered

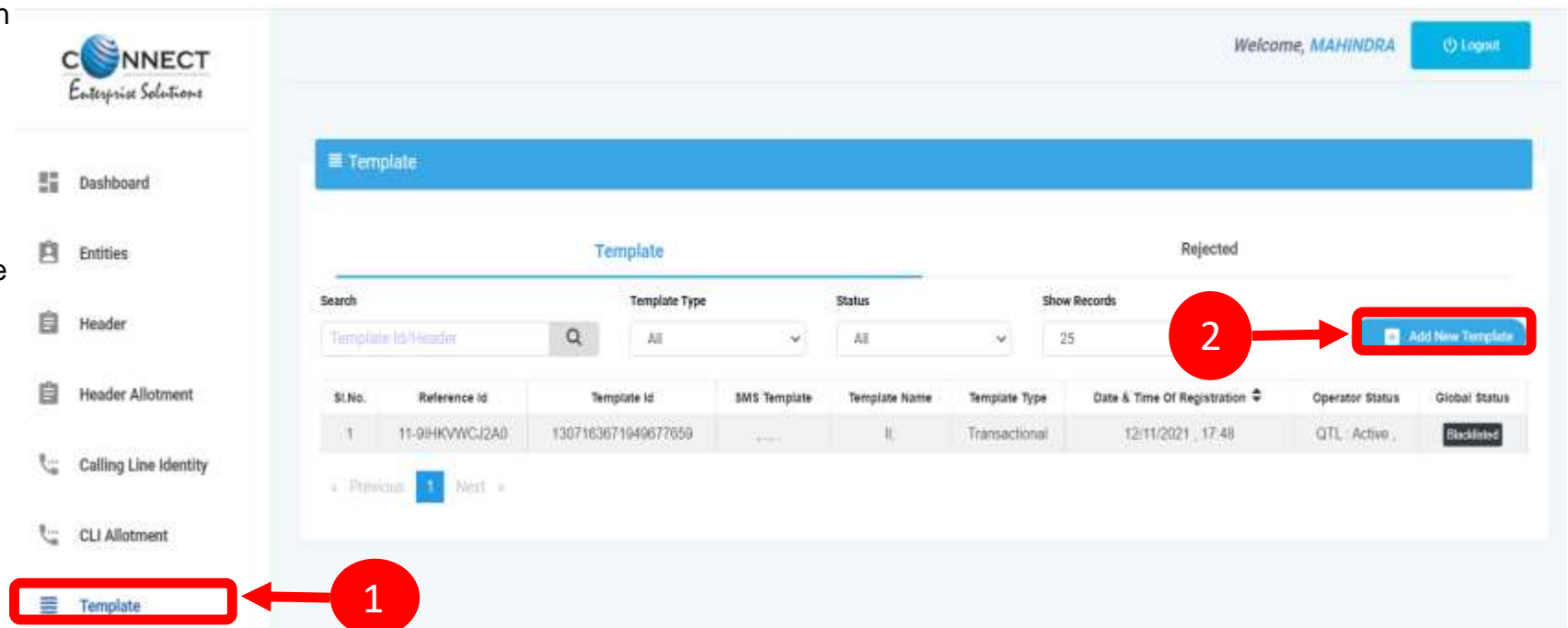
TEMPLATE (CONTENT)

TEMPLATE – CREATION OF NEW TEMPLATE

Templates are created for Commercial Communication and as per TRAI guidelines all the Principle Entities needs to register their Templates before sending Commercial Communication.

1 In the Entity portal on the side bar click on the **Templates** option to view the page.

2 In the Template page click on **Add New Template** button to create new Templates.



The screenshot displays the CONNECT Enterprise Solutions interface. On the left sidebar, the 'Template' option is highlighted with a red box and a red arrow labeled '1'. The main content area shows the 'Template' page. At the top right of the main content area, there is a 'Welcome, MAHINDRA' message and a 'Logout' button. Below this, there is a 'Template' header and a 'Rejected' status indicator. The main content area contains a search bar, filters for 'Template Type' and 'Status', and a 'Show Records' dropdown. A red box and a red arrow labeled '2' point to the 'Add New Template' button in the top right corner of the main content area. Below the filters, there is a table with columns: Sl.No., Reference Id, Template Id, SMS Template, Template Name, Template Type, Date & Time Of Registration, Operator Status, and Global Status. The table contains one row of data. At the bottom of the table, there are 'Previous' and 'Next' navigation buttons.

Sl.No.	Reference Id	Template Id	SMS Template	Template Name	Template Type	Date & Time Of Registration	Operator Status	Global Status
1	11-9IHVVWCJ2A0	1307163671949677659		II	Transactional	12/11/2021, 17:48	QTL: Active	Blacklisted

TEMPLATE – SELECTION OF NAME/COMMUNICATION AND CONTENT TYPE

3

Fill an appropriate Template name basis on the business requirement in the **Template Name** column

4

In the **Communication Type** column select the type of communication from the following:

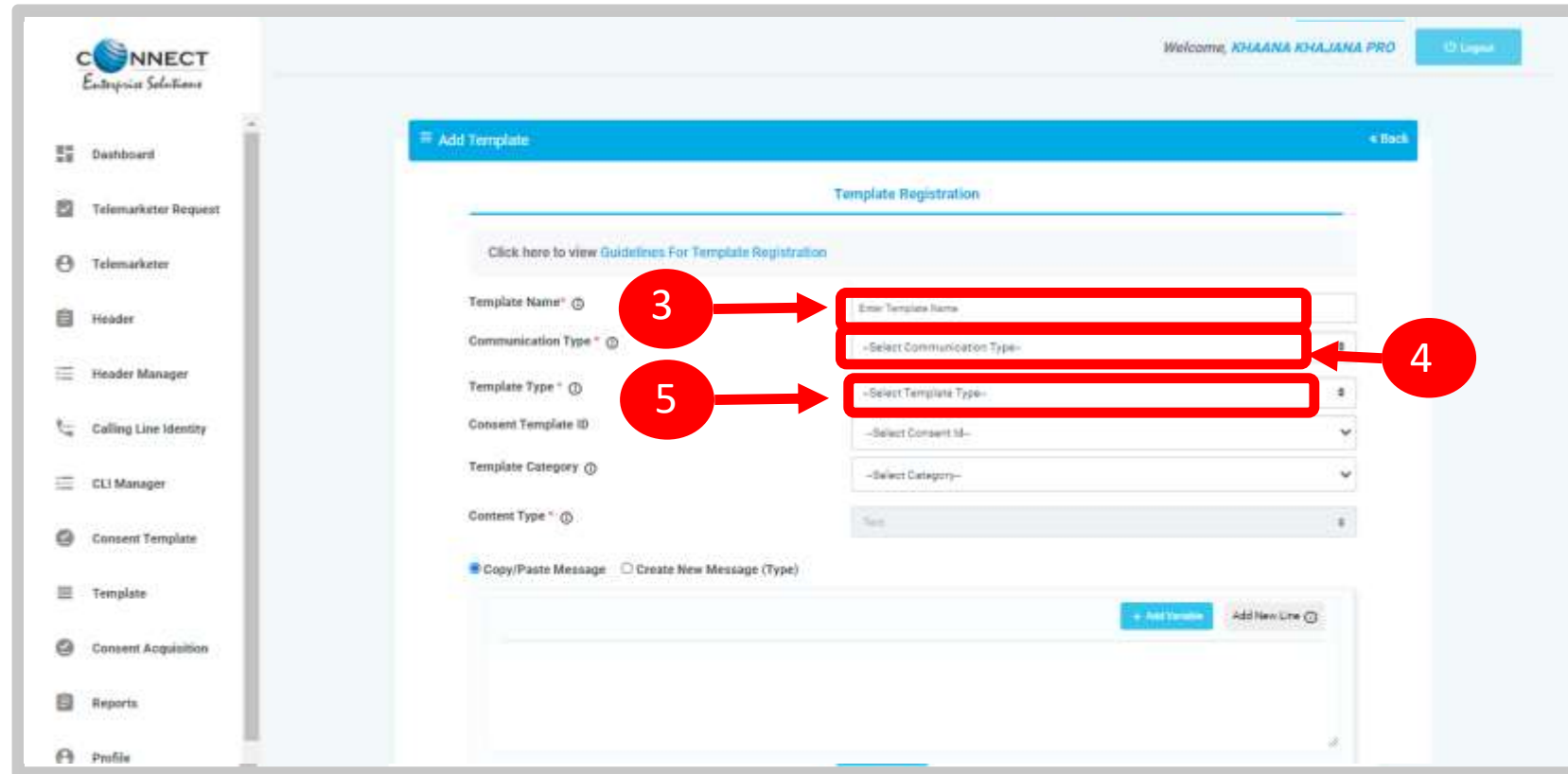
- SMS
- Call

Note: Currently SMS is only available for selection.

5

In the **Template Type** select any of the following options:

- Transactional
- Promotional
- Service Explicit
- Service Implicit



The screenshot shows the 'Add Template' form in the CONNECT Enterprise Solutions interface. The form is titled 'Template Registration' and includes a 'Back' button. Below the title, there is a link to 'Click here to view Guidelines For Template Registration'. The form contains the following fields:

- Template Name ***: A text input field with a red circle '3' and an arrow pointing to it.
- Communication Type ***: A dropdown menu with a red circle '4' and an arrow pointing to it.
- Template Type ***: A dropdown menu with a red circle '5' and an arrow pointing to it.
- Consent Template ID**: A dropdown menu.
- Template Category**: A dropdown menu.
- Content Type ***: A dropdown menu.

At the bottom of the form, there are two radio buttons: 'Copy/Paste Message' (selected) and 'Create New Message (Type)'. Below these buttons is a large text area for the message content, with 'Add Version' and 'Add New Line' buttons on the right.

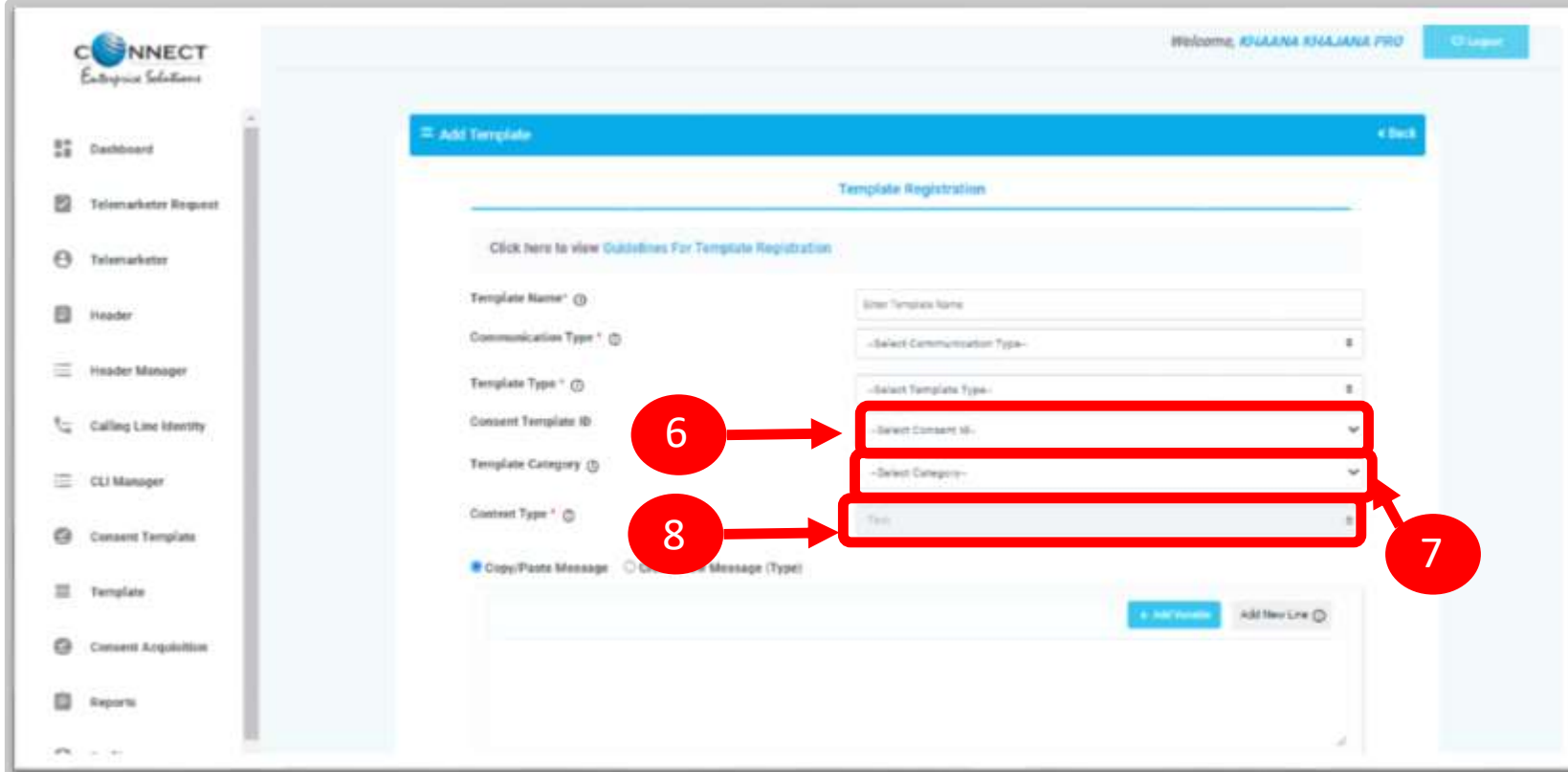
TEMPLATE – SELECTION OF CONSENT TEMPLATE /CONTENT CATEGORY

6 In the **Consent Template ID** column select the relevant Consent Template registered on DLT from the dropdown list.

! *Consent Template ID is not mandatory for Transactional and Service Implicit commercial communications.*

7 In the **Template Category** column select any of the Category from the dropdown list as given which is appropriate for the Template to be created.

8 In the **Content Type** column it will either be TEXT or UNICODE and it will be auto fetched basis on the selection of language for the content.
NOTE: (Any language other than English will be taken as Unicode)



The screenshot shows the 'Add Template' form in the CONNECT Enterprise Solutions interface. The form is titled 'Template Registration' and includes a sidebar with navigation options like Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, and Reports. The main form fields are:

- Template Name* (text input)
- Communication Type* (dropdown menu)
- Template Type* (dropdown menu)
- Consent Template ID (dropdown menu, highlighted with red circle 6)
- Template Category (dropdown menu, highlighted with red circle 7)
- Content Type* (dropdown menu, highlighted with red circle 8, currently set to 'Text')

At the bottom of the form, there are radio buttons for 'Copy/Paste Message' and 'Create New Message (Type)', and buttons for 'Add Template' and 'Add New Line'.

TEMPLATE – CREATION OF CONTENT

In the Content creation section there are two options available:

- Copy/Paste Message
- Create New Message(Type)

Select any of the option basis on the requirement of content creation.

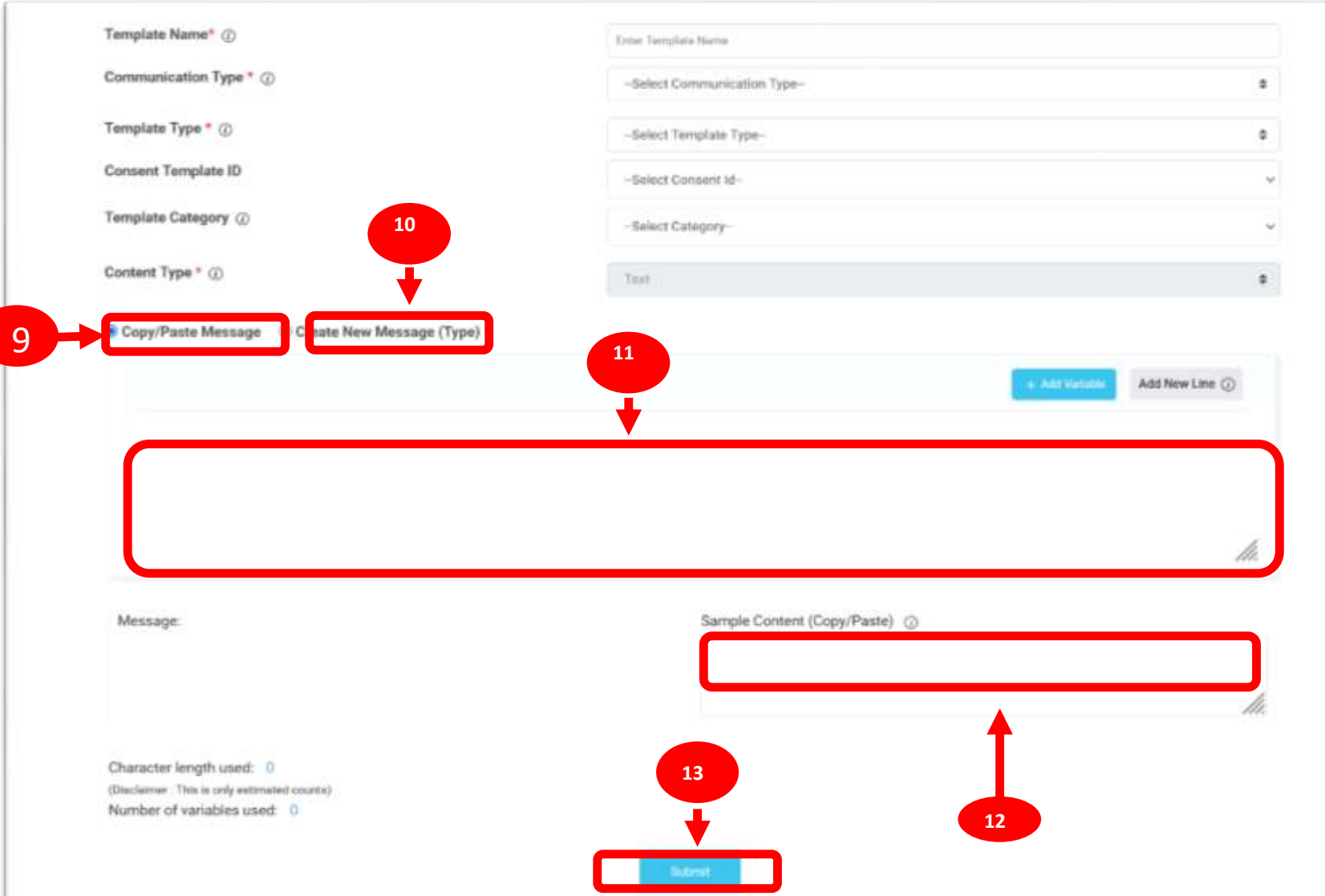
9 In the **Copy/Paste Message** option, copy any message and create the required content for the Template.

10 In the **Create New Message** option, type the required content.

11 In the **Create New Message Box** type the required content and to add variables there are options available on the panel.

12 Fill the sample content of the template created

13 Press **Submit** button to confirm and send the request for approval by the Operator.



The screenshot shows the 'Template Creation' form with the following elements and callouts:

- 9**: Points to the 'Copy/Paste Message' radio button.
- 10**: Points to the 'Create New Message (Type)' radio button.
- 11**: Points to the large text area for creating new message content.
- 12**: Points to the 'Sample Content (Copy/Paste)' text area.
- 13**: Points to the 'Submit' button.

Form fields include: Template Name*, Communication Type*, Template Type*, Consent Template ID, Template Category, Content Type*, and a 'Text' input field. There are also '+ Add Variable' and 'Add New Line' buttons.

TEMPLATE – OTP / REQUEST SUBMISSION

12 Fill the sample content of the template created

13 Press **Submit** button to confirm and send the request for approval by the Operator.

The screenshot shows a web form for submitting an OTP or request. At the top, there are two radio buttons: "Copy/Paste Message" (selected) and "Create New Message (Type)". Below this is a large text area for the message content, with a "+ Add Variable" button and an "Add New Line" button with an information icon. Below the message area, there is a "Message:" label and a text input field. To the right of the input field is a button labeled "Sample Content (Copy/Paste)" with an information icon. Below the input field, there is a section for "Character length used: 0" and "Number of variables used: 0", with a disclaimer "(Disclaimer : This is only estimated counts)". At the bottom right, there is a "Submit" button. Red circles with numbers 12 and 13 are overlaid on the form. Circle 12 points to the "Sample Content (Copy/Paste)" button. Circle 13 points to the "Submit" button.

☒ Copy/Paste Message ☐ Create New Message (Type)

+ Add Variable Add New Line ⓘ

Message:

Sample Content (Copy/Paste) ⓘ

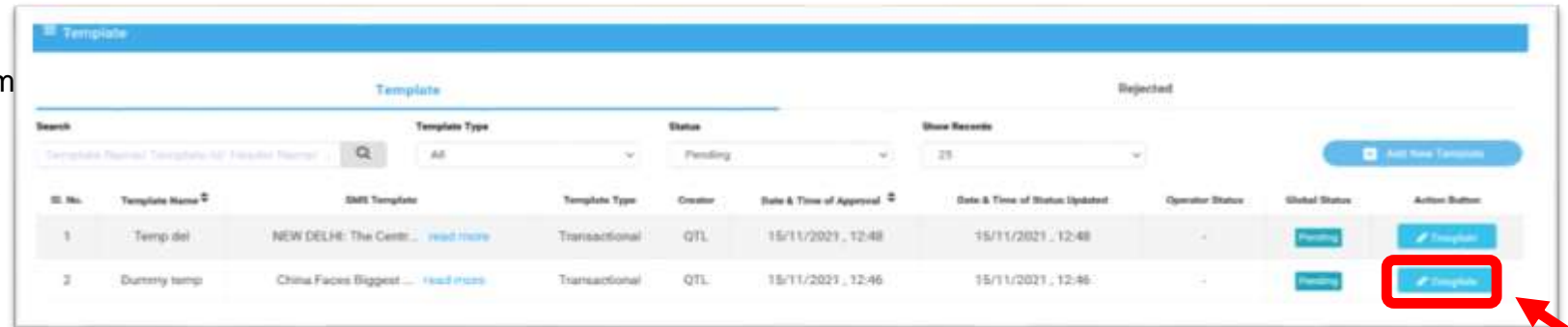
Character length used: 0
(Disclaimer : This is only estimated counts)
Number of variables used: 0

Submit

EDIT – TEMPLATE REQUEST

1

Template can be edit if its in pending state. Click on Edit button. Pre-filled form will appear and the Entity can make the changes accordingly and Re-submit the same for approval with same Reference id.

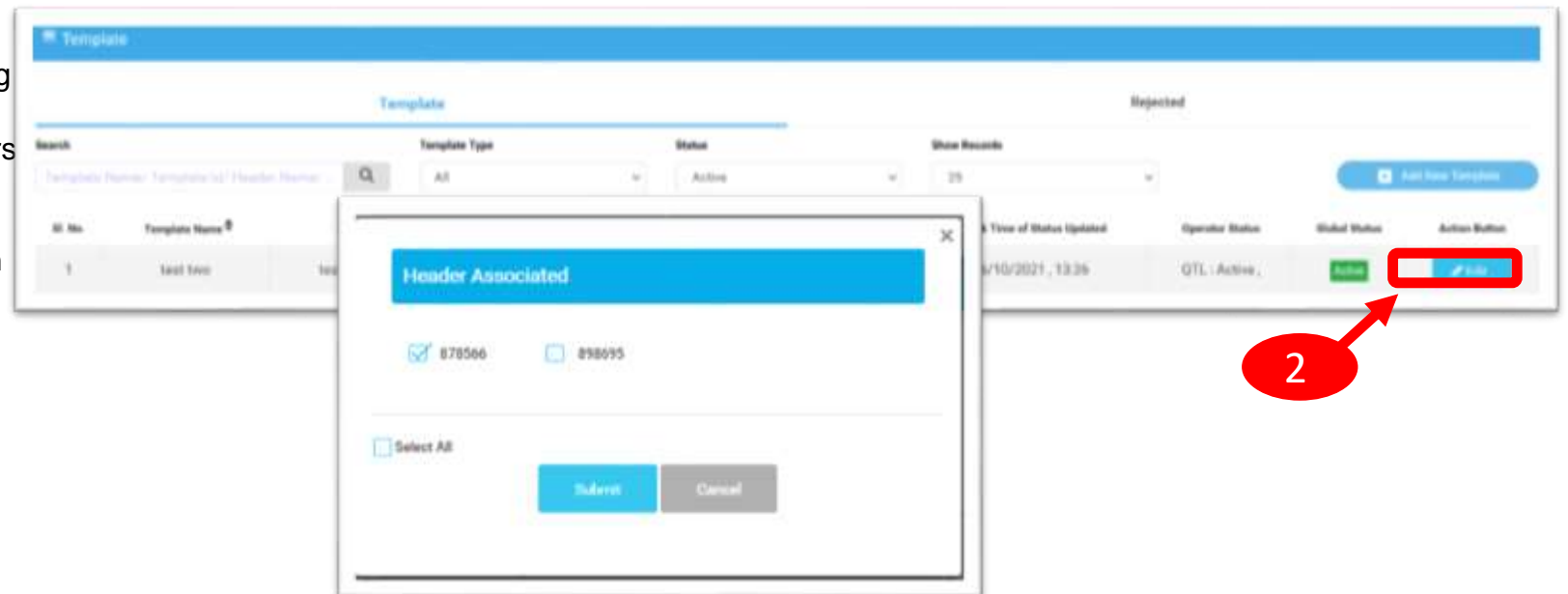


ID No.	Template Name	SMS Template	Template Type	Creator	Date & Time of Approval	Date & Time of Status Updated	Operator Status	Global Status	Action Button
1	Temp del	NEW DELHI: The Centr...	Transactional	QTL	15/11/2021, 12:48	15/11/2021, 12:48	-	Pending	Edit
2	Dumrry temp	China Faces Biggest ...	Transactional	QTL	15/11/2021, 12:46	15/11/2021, 12:46	-	Pending	Edit

2

Only Header changes can be done in Active Templates. Click on Edit button, Headers associated with Template along with available Headers will appear. The Entity can linked or D-linked the Headers accordingly.

P.S : At least one Header should remain linked with the Template.



ID No.	Template Name	SMS Template	Template Type	Creator	Date & Time of Approval	Date & Time of Status Updated	Operator Status	Global Status	Action Button
1	test tem	test	Transactional	QTL	15/11/2021, 13:36	15/11/2021, 13:36	QTL: Active	Active	Edit

Header Associated

☒ 878566
 ☐ 898695

☐ Select All

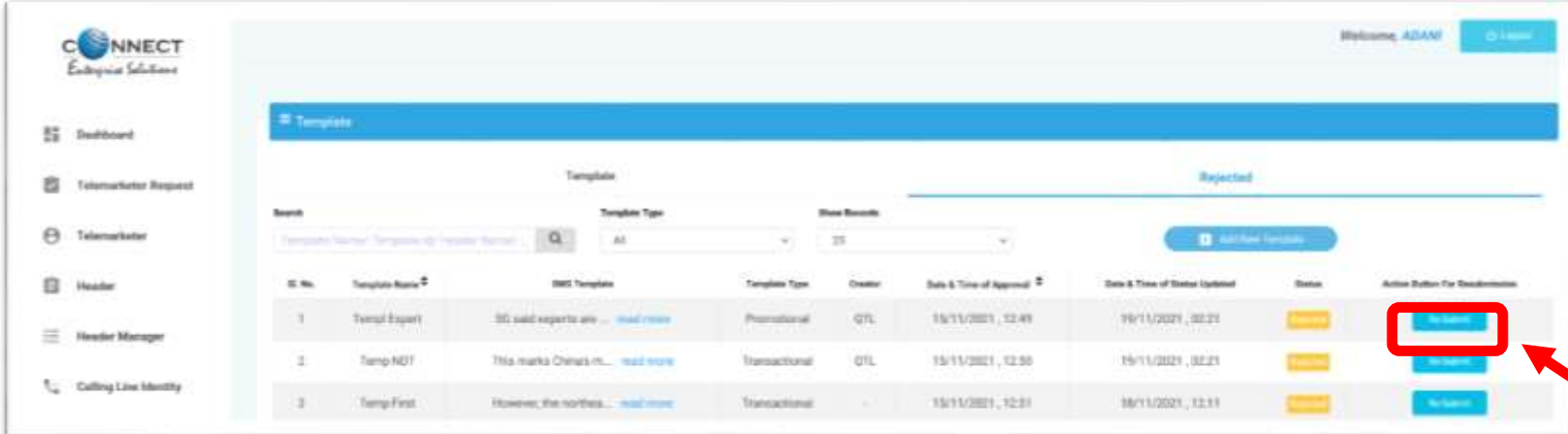
[Submit](#)
[Cancel](#)

RE-SUBMISSION – TEMPLATE REQUEST

1

Under Rejected section, click on Re-Submit button. Pre-filled form will appear. The Entity can make the changes and re-submit the same for approval.

P.S: New Reference id will be generated for the request Re-submitted.



The screenshot shows the 'Template' management interface. On the left is a sidebar with navigation links: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, and Calling Line Identity. The main area has a 'Template' header and a 'Rejected' filter tab. Below the header is a search bar and filters for 'Template Type' (set to 'All') and 'Show Records' (set to '25'). A table lists three templates, each with a 'Re-submit' button highlighted by a red box. A red arrow points to the first 'Re-submit' button.

ID No.	Template Name	BMS Template	Template Type	Creator	Date & Time of Approval	Date & Time of Status Updated	Status	Action Button For Decision Making
1	Temp Export	SG said exports are ... read more	Promotional	QTL	15/11/2021, 12:49	15/11/2021, 02:21	Rejected	Re-submit
2	Temp HDT	This marks China's m... read more	Transactional	QTL	15/11/2021, 12:50	15/11/2021, 02:21	Rejected	Re-submit
3	Temp First	However, the north... read more	Transactional	-	15/11/2021, 12:51	15/11/2021, 12:11	Rejected	Re-submit

BLACKLIST– TEMPLATE REQUEST

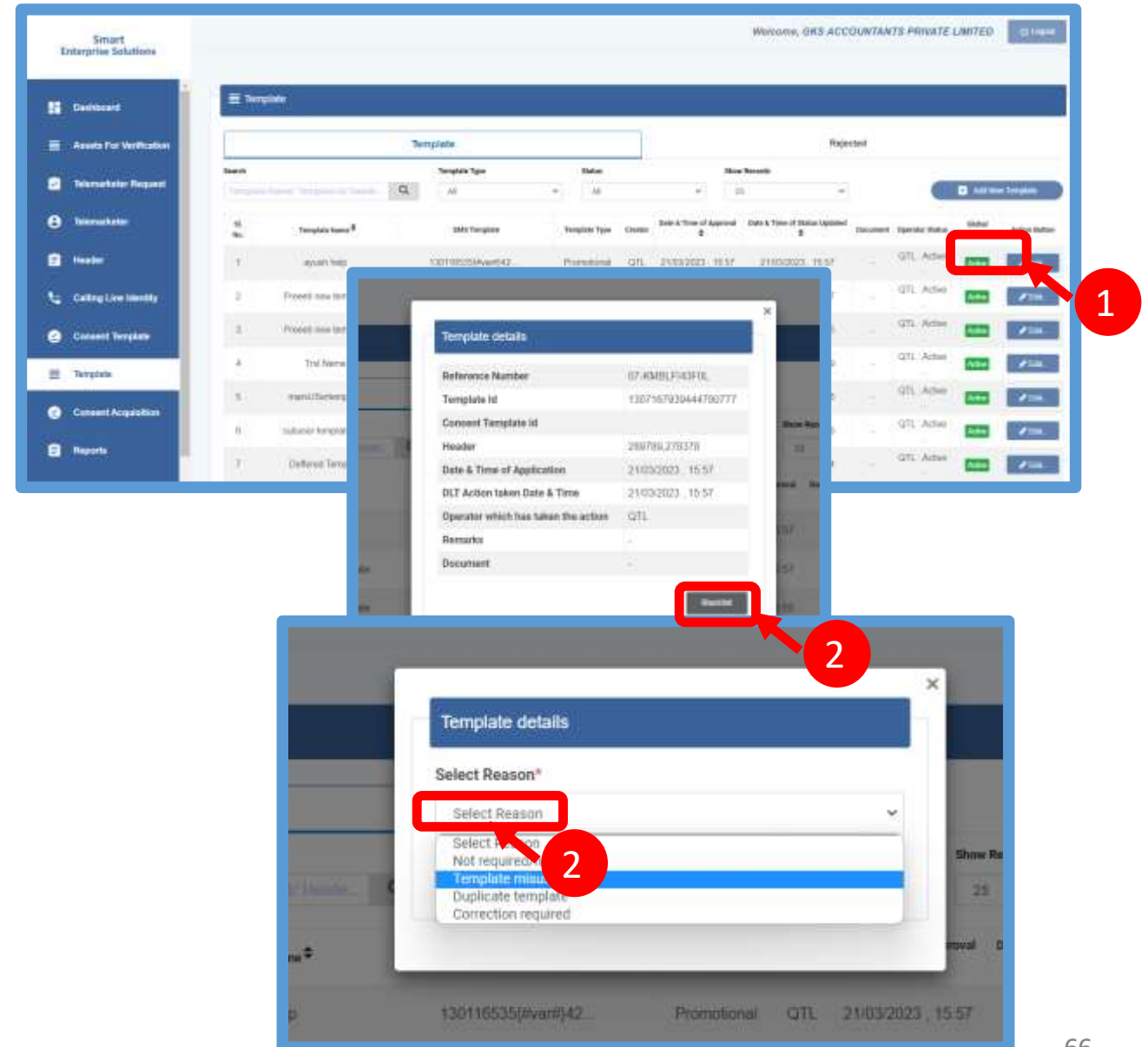
Here the Entity has the option to Blacklist there unused Templates.

1

Under Template section, Click **Active** to Blacklist the Template.

2

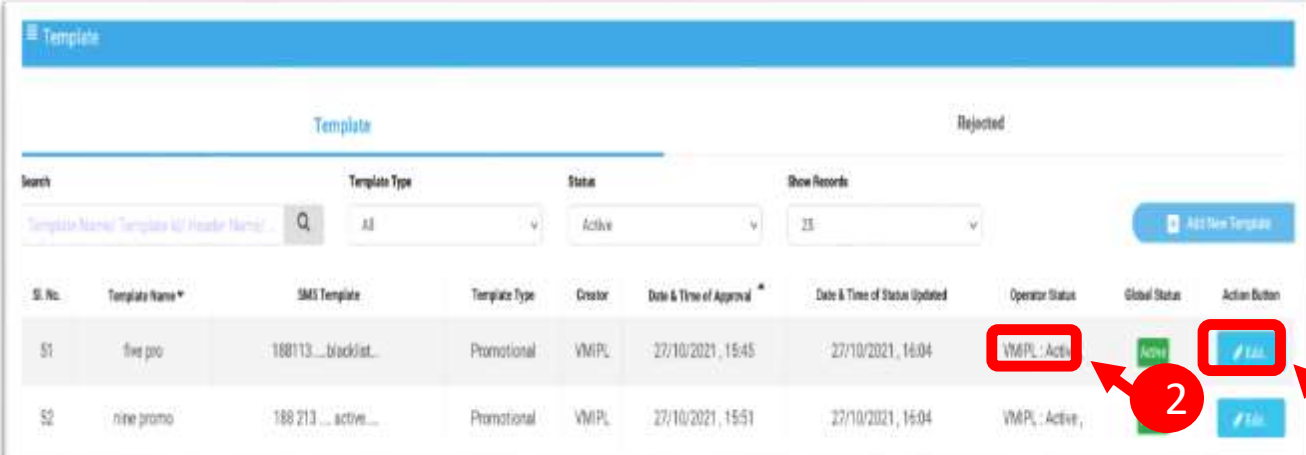
The Entity has to choose the Blacklist Reason & click on Submit Button.



REGISTER – OTHER TSP’S TEMPLATE

1 All the Templates registered with other TSP will reflect In Template TAB with Global status and operator wise status.

2 Its not active on QTL till the time operator approves the same
Once action taken by the QTL it will reflect under operator status.



SI No.	Template Name *	SMS Template	Template Type	Creator	Date & Time of Approval *	Date & Time of Status Updated	Operator Status	Global Status	Action Button
S1	five pro	188113...blacklist...	Promotional	VMPL	27/10/2021, 15:45	27/10/2021, 16:04	VMPL : Active	Active	✎ Edit
S2	nine promo	188 213 ... active...	Promotional	VMPL	27/10/2021, 15:51	27/10/2021, 16:04	VMPL : Active	Active	✎ Edit

STATUS – OTHER TSP’S TEMPLATE

1

Once operator approve the request template will reflect under operator wise status as active.

Template

Template

Rejected

Search

Template Type

Status

Show Records

Template Name/ Template ID/ Module Name/

Q

AS

AS

25

Add New Template

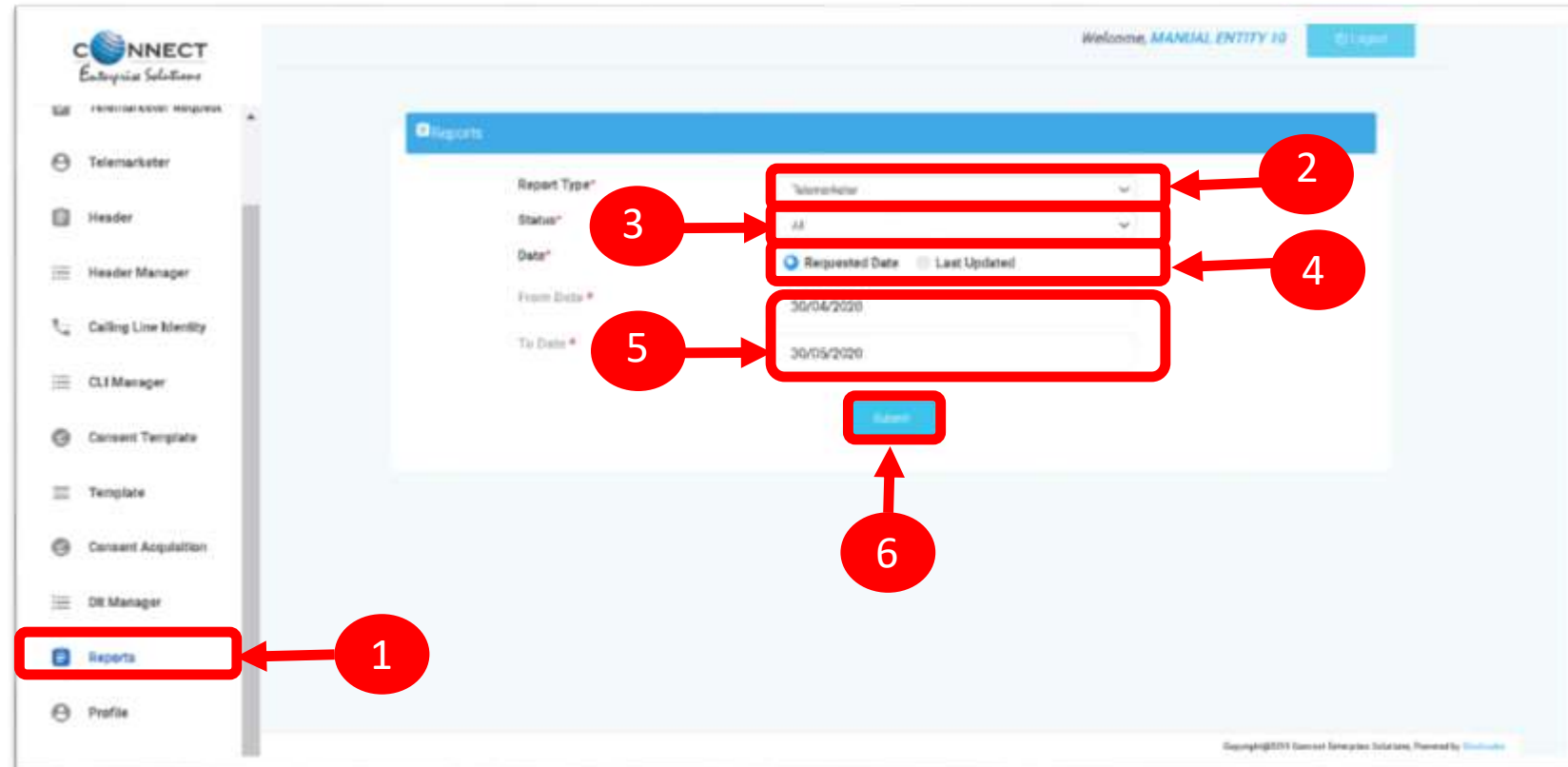
Sl. No.	Template Name *	SMS Template	Template Type	Creator	Date & Time of Approval *	Date & Time of Status Updated	Operator Status	Global Status	Action Buttons
1	test	SMSPTM Testing black... read more	Transactional	VMPL	27/10/2021, 15:26	27/10/2021, 17:18	VMPL : Active	Blocked	...
2	8f pro	188114suriend... read more	Promotional	VMPL	27/10/2021, 15:58	28/10/2021, 10:31	VMPL : Active	Blocked	...
3	one	advice test read more	Transactional	VMPL	27/10/2021, 15:24	28/10/2021, 10:32	VMPL : Active	Blocked	...
4	four	stipittu... read more	Transactional	VMPL	27/10/2021, 15:27	28/10/2021, 10:37	VMPL : Active	Blocked	...
5	hrt temp	hrt temp test fshs...	Service Explicit	QTL	26/10/2021, 11:57	26/10/2021, 13:25	QTL : Active	Active	...
6	hfy temp	testing of hfy...	Service Implicit	QTL	26/10/2021, 11:59	26/10/2021, 13:25	QTL : Active	Active	...
7	prt	testing of fsh...	Service Implicit	QTL	26/10/2021, 12:00	26/10/2021, 13:25	QTL : Active	Active	...

1

REPORTS

ENTITY REPORTS

- 1 Select the **Reports** from the sidebar of the panel.
- 2 Select the **Report Type**.
- 3 Select the **Status** or else by default it will be All
- 4 Select the relevant **date** option for Report
- 5 Select the **date range** for which the report needs to be generated.
- 6 Press **Submit** button to generate the report.



The screenshot shows the 'Reports' page in the CONNECT Enterprise Solutions application. The sidebar on the left contains a list of menu items: 'Reports' (highlighted with a red box and arrow 1), 'Profile', 'Telemarketer', 'Header', 'Header Manager', 'Calling Line Identity', 'CLI Manager', 'Consent Template', 'Template', 'Consent Acquisition', 'DB Manager', and 'Reports' (highlighted with a red box and arrow 1). The main content area is titled 'Reports' and contains a form with the following fields:

- Report Type***: A dropdown menu with 'Telemarketer' selected (arrow 2).
- Status***: A dropdown menu with 'All' selected (arrow 3).
- Date***: A section with two radio buttons: 'Requested Date' (selected, arrow 4) and 'Last Updated'.
- From Date ***: A text input field with '30/04/2020' (arrow 5).
- To Date ***: A text input field with '30/05/2020' (arrow 5).
- Submit**: A blue button (arrow 6).

The form is enclosed in a red box, and the 'Submit' button is also highlighted with a red box and arrow 6.

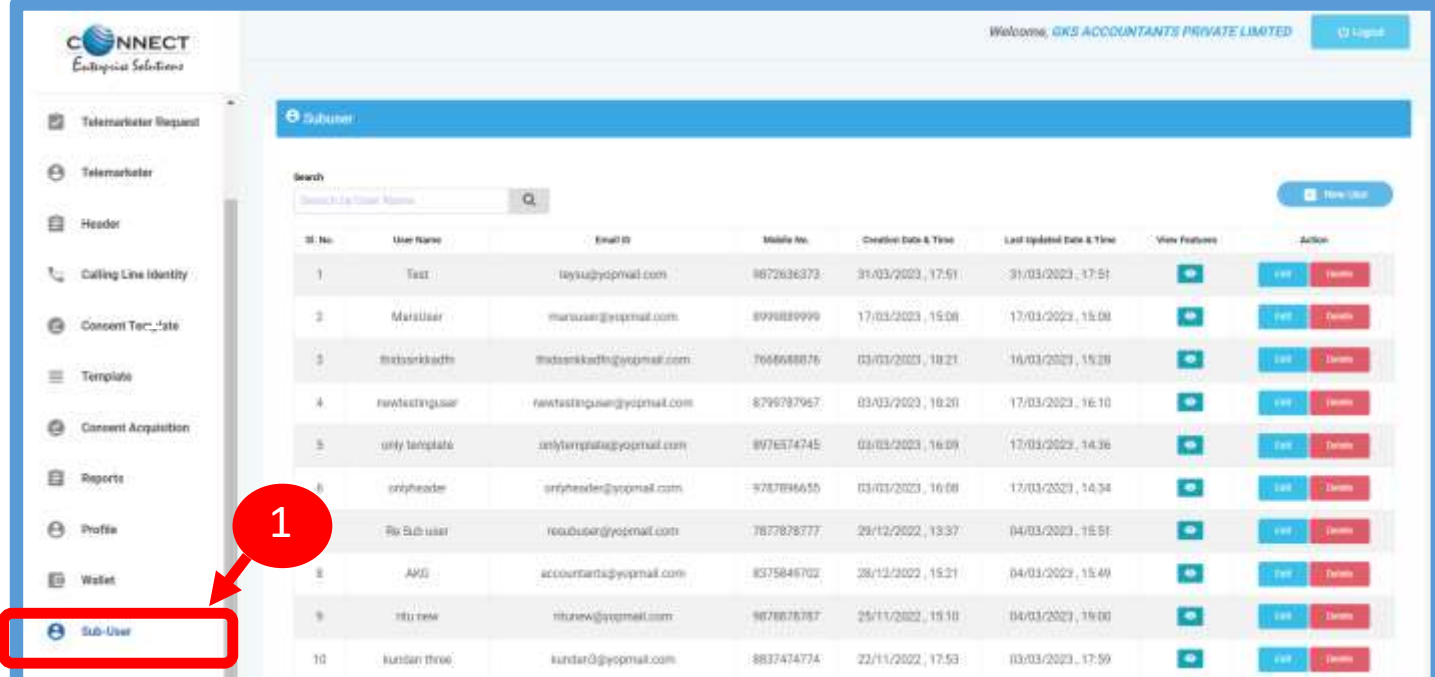
ENTITY-SUB USER

ENTITY-SUB USER

1

In this process, the Entity will have the option to add his sub-users, who can work on his behalf as per assigned role/rights. For this, there will be an option in the side menu to create sub-users.

Wherein the Entity has to enter the user name, email id and mobile number of the sub-user he wants to create.



Subuser

Search

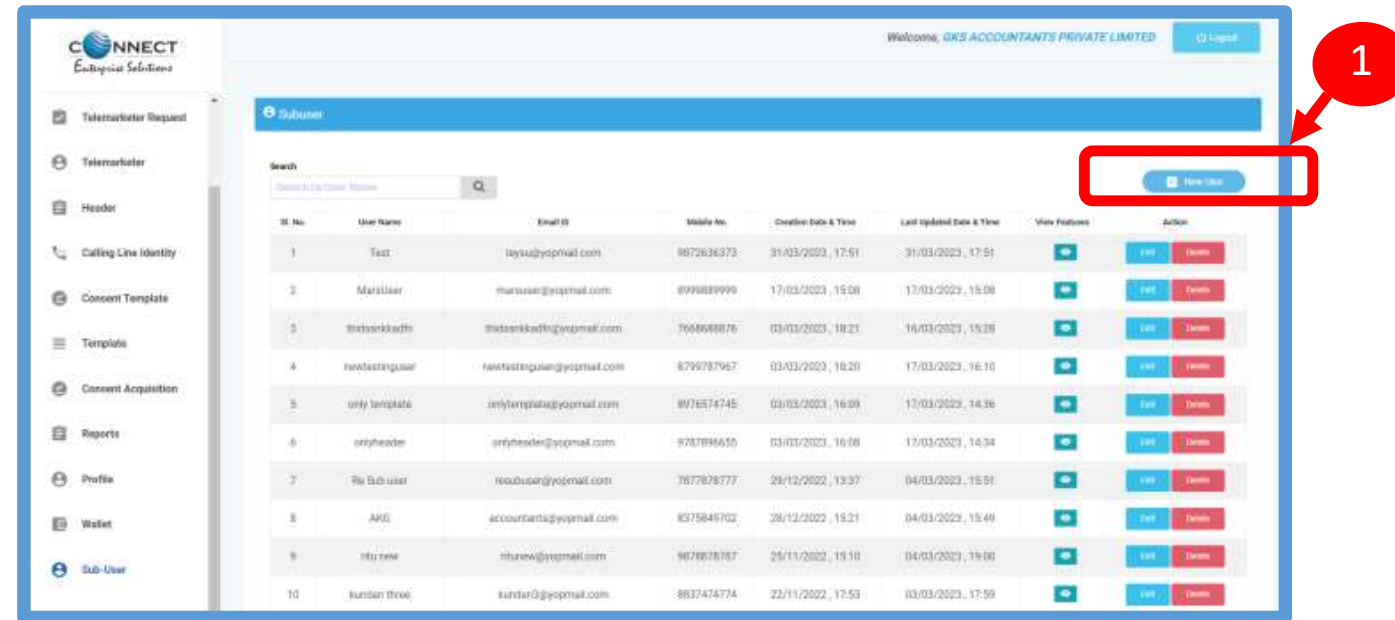
Search by User Name

ID No.	User Name	Email ID	Mobile No.	Creation Date & Time	Last updated Date & Time	View Features	Action
1	Test	testsub@yahoo.com	9872636373	31/03/2023, 17:51	31/03/2023, 17:51		View Delete
2	Main User	mainuser@gmail.com	8996889999	17/03/2023, 15:08	17/03/2023, 15:08		View Delete
3	testsubkadh	testsubkadh@gmail.com	7666688876	03/03/2023, 18:21	16/03/2023, 15:28		View Delete
4	newtestinguser	newtestinguser@gmail.com	8799797967	03/03/2023, 18:20	17/03/2023, 16:10		View Delete
5	only template	onlytemplate@gmail.com	8976574745	03/03/2023, 16:09	17/03/2023, 14:36		View Delete
6	onlyheader	onlyheader@gmail.com	9787896655	03/03/2023, 16:08	17/03/2023, 14:34		View Delete
7	Re Sub user	reosubuser@gmail.com	7877878777	29/12/2022, 19:37	04/03/2023, 15:51		View Delete
8	AKG	accountants@gmail.com	8575846702	28/12/2022, 15:21	04/03/2023, 15:49		View Delete
9	ntu new	ntunew@gmail.com	9878878787	25/11/2022, 19:18	04/03/2023, 19:08		View Delete
10	kundan three	kundan3@gmail.com	8837474774	22/11/2022, 17:53	03/03/2023, 17:59		View Delete

ENTITY-SUB USER CREATION

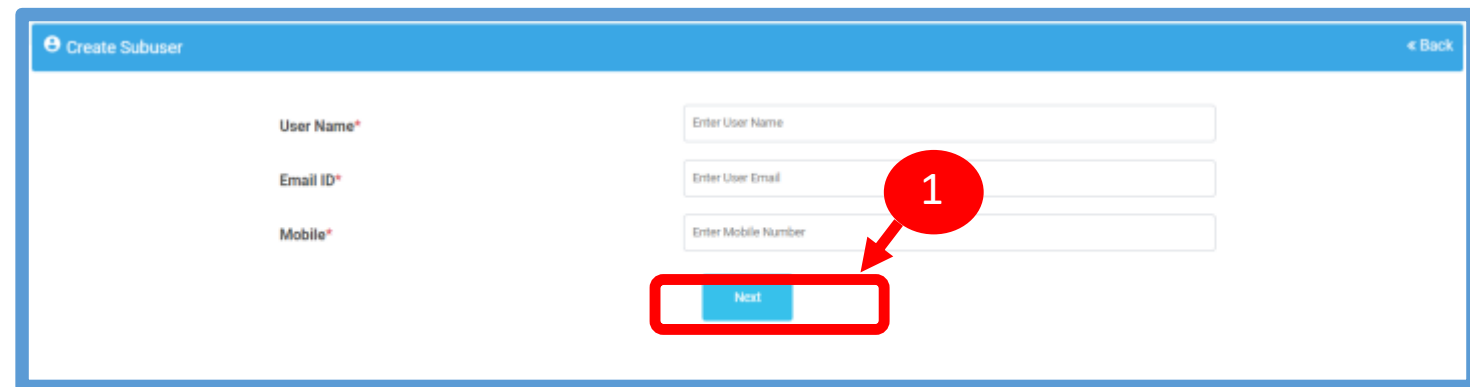
1

Click on the New User button to enter the sub user details.



1

The user will Submit the details required & click on Submit Button.



The screenshot shows the 'Create Subuser' form. It has a blue header with the title 'Create Subuser' and a 'Back' button. The form contains three input fields: 'User Name*', 'Email ID*', and 'Mobile*'. Each field has a placeholder text: 'Enter User Name', 'Enter User Email', and 'Enter Mobile Number'. A red box highlights the 'Next' button at the bottom right, with a red circle and the number '1' pointing to it.

ENTITY-SUB USER ROLE ASSIGN

- 1 The admin user will get the option to edit the rights.
Once the user clicks on Submit button details will be updated.

The screenshot displays the 'Edit Subuser' interface with a blue header bar containing the title and a 'Back' button. Below the header is a section titled 'Entity Feature List To Assign Subuser'. This section contains seven panels, each representing a different entity type with a list of assignable features:

- Telemarketer Request:**
 - ☐ Request Submit
- Telemarketer:**
 - ☐ Only View
 - ☐ Rescued TM Entity Request
 - ☐ Telemarketer Report
 - ☒ Approve Telemarketer Request
- Header:**
 - ☐ Only View
 - ☐ Surrendered Headers
 - ☐ New Header Creation
 - ☐ Claim Header Request
 - ☐ Header Report
 - ☐ Claimed Headers Report
- Consent Template:**
 - ☐ Only View
 - ☐ New Consent Template Creation
 - ☐ Download QR Code Of Active Templates To Acquire Consent
 - ☐ Test/Dev Consent Templates
 - ☐ Registered Other TSP Templates
 - ☐ Consent Template Report
- Template:**
 - ☐ Only View
 - ☐ Template Creation
 - ☐ Edit Pending Templates
 - ☐ Blacklist Templates
 - ☐ Edit Headers In Active Templates
 - ☐ Re-submission Of Rejected Templates
 - ☐ Template Report
- Consent Acquisition:**
 - ☐ Only View
 - ☐ Acquire Digital Consent
 - ☐ Download API Doc
- Wallet:**
 - ☐ Only View
 - ☐ Recharge The Wallet

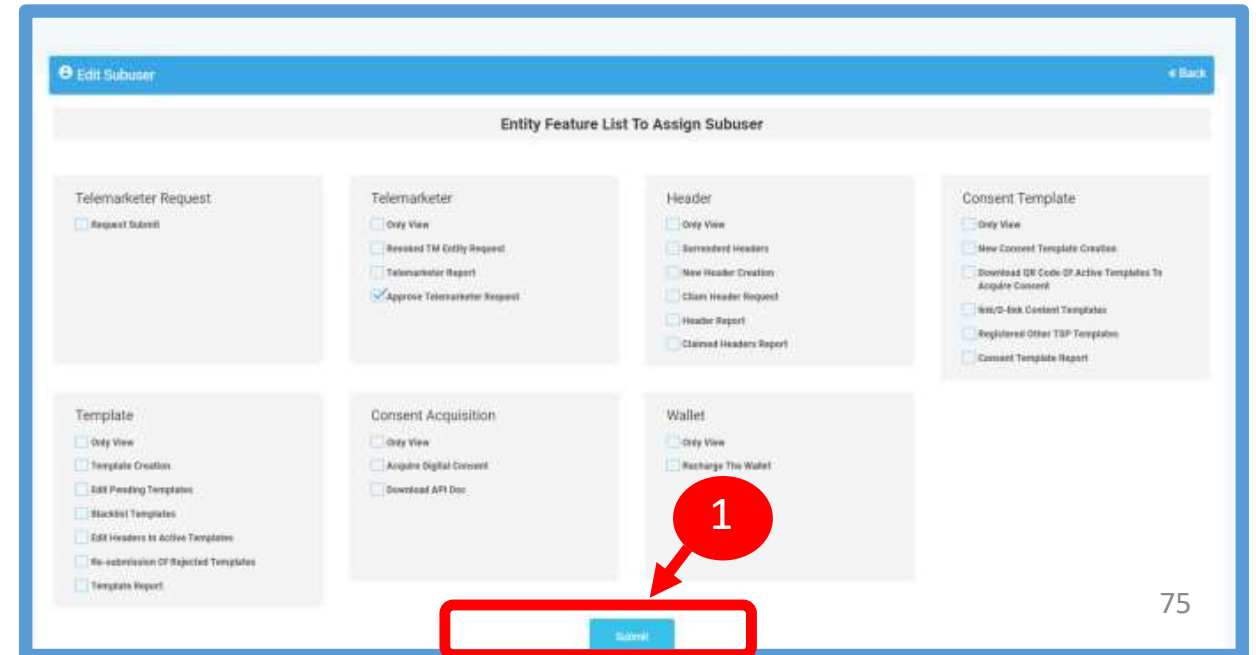
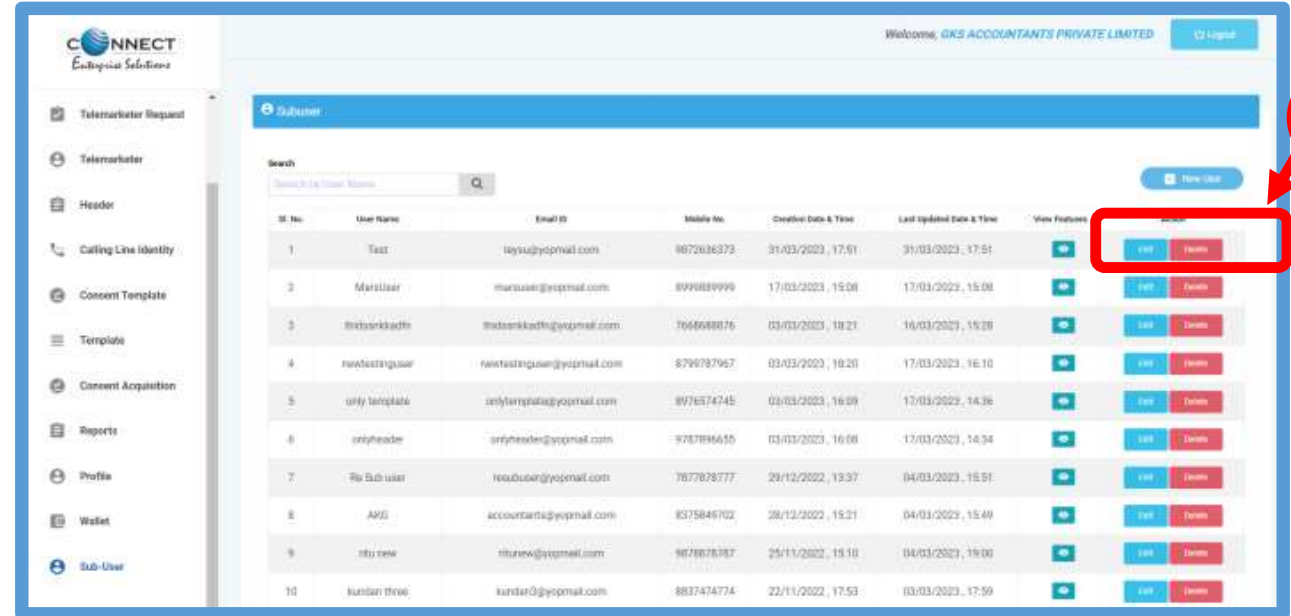
At the bottom center of the interface is a blue 'Submit' button, which is highlighted with a red rectangle. A red arrow points from a red circle containing the number '1' to this button.

ENTITY-SUB USER ROLE EDITION

1

The admin user will get the option to edit the rights. Can view all checked and unchecked as per features. Accordingly, the admin user can make the changes.

Once the user clicks on Submit button details will be updated.



ENTITY PROFILE

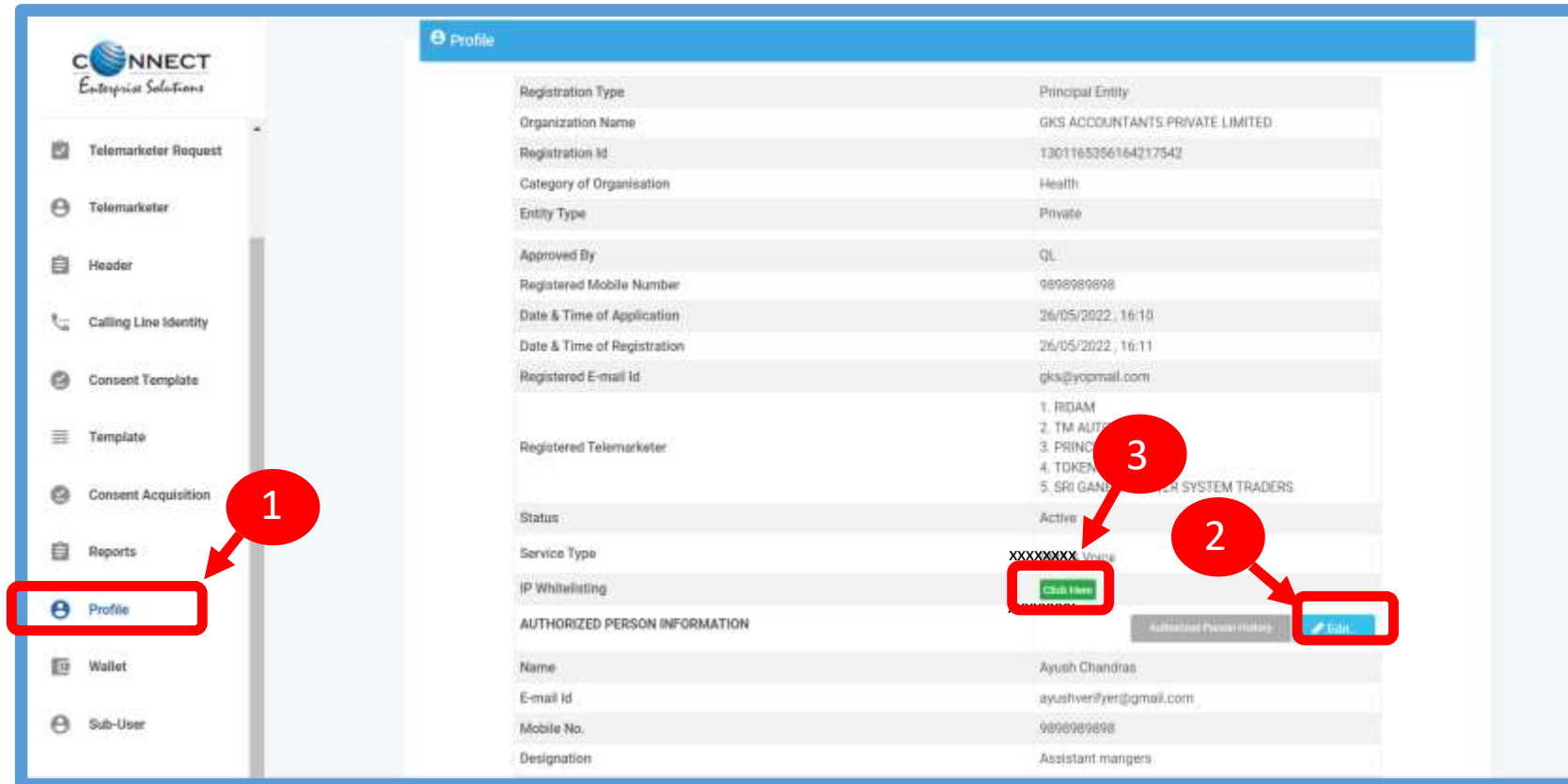
PROFILE PAGE

Profile Page contains the details of the Entity and the Authorized Representative of the Company..

1 Click on the **Profile** available on the sidebar

2 Click on the **Edit** button to update or change the Authorized Person's details.

3 Click on the **Click Here** link to change the password.



The screenshot shows the 'Profile' page in the CONNECT Enterprise Solutions application. The sidebar on the left contains a list of menu items: Telemarketer Request, Telemarketer, Header, Calling Line Identity, Consent Template, Template, Consent Acquisition, Reports, Profile (highlighted with a red box and callout 1), Wallet, and Sub-User. The main content area is titled 'Profile' and displays a table of entity details. Below this table is a section for 'AUTHORIZED PERSON INFORMATION' with a table of user details. A red box and callout 2 highlight the 'Edit' button in the bottom right corner of the user information table. A red box and callout 3 highlight the 'Click Here' link in the 'Service Type' field of the entity details table.

Entity Details	
Registration Type	Principal Entity
Organization Name	GKS ACCOUNTANTS PRIVATE LIMITED
Registration Id	1301165356164217542
Category of Organisation	Health
Entity Type	Private
Approved By	QL
Registered Mobile Number	9898989898
Date & Time of Application	26/05/2022, 16:10
Date & Time of Registration	26/05/2022, 16:11
Registered E-mail Id	gks@yopmail.com
Registered Telemarketer	1. RIDAM 2. TM AUT 3. PRINC 4. TOKEN 5. SRI GAN
Status	Active
Service Type	XXXXXXXXX
IP Whitelisting	Click Here

AUTHORIZED PERSON INFORMATION	
Name	Ayush Chandras
E-mail Id	ayushver@yahoo.com
Mobile No.	9898989898
Designation	Assistant mangers

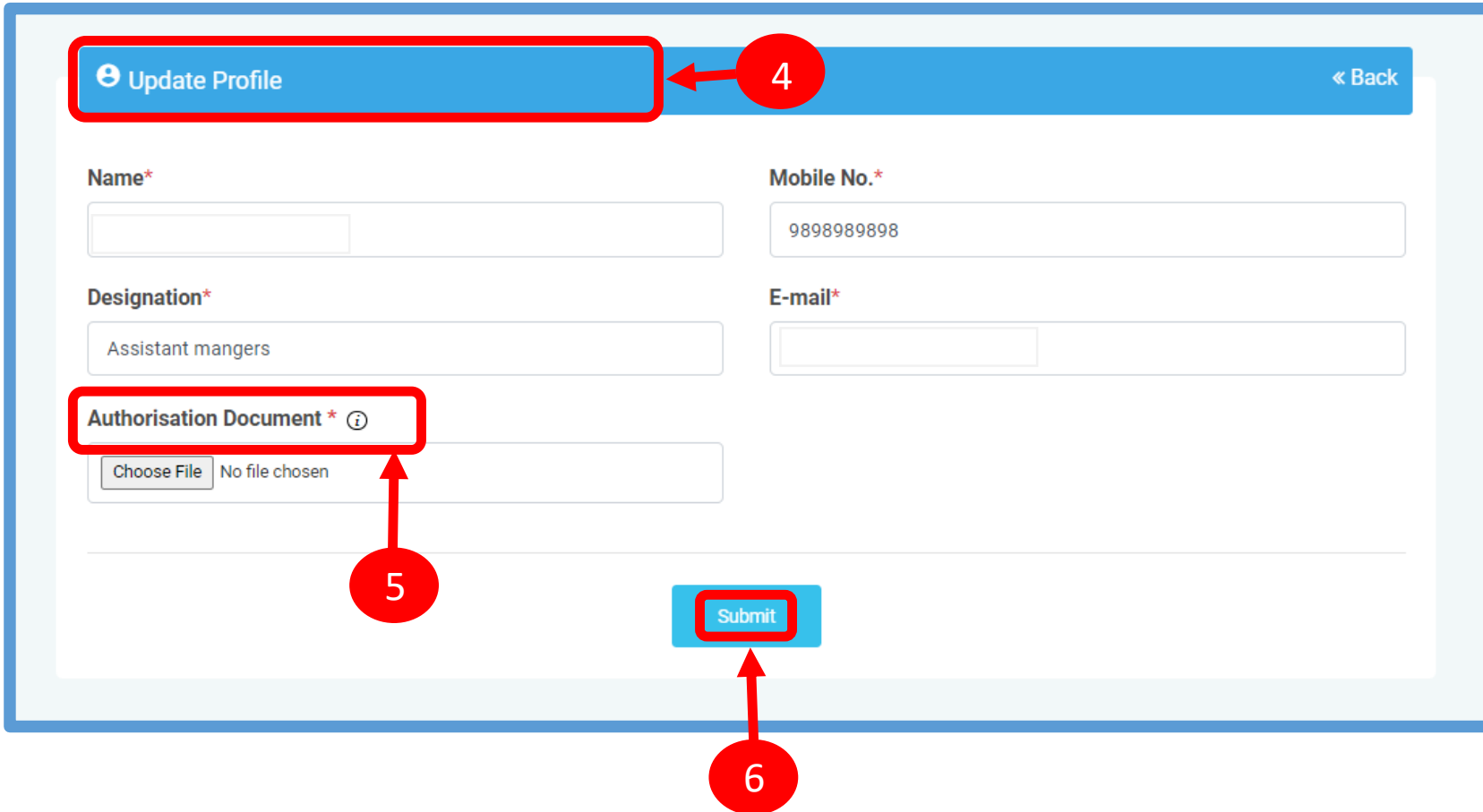
PROFILE UPDATE PAGE

4 In the **Update Profile** page user can update the following details:

- Name of the Authorized Person
- Designation of the Authorized Person
- Mobile number of the Authorized Person
- Email ID of the Authorized Person

5 Upload the **authorization document**
Eg: Board Resolution copy or letter from the Authority of the Company.

6 **Submit** the request to update the details.
 Once the Operator approves the details will get updated.

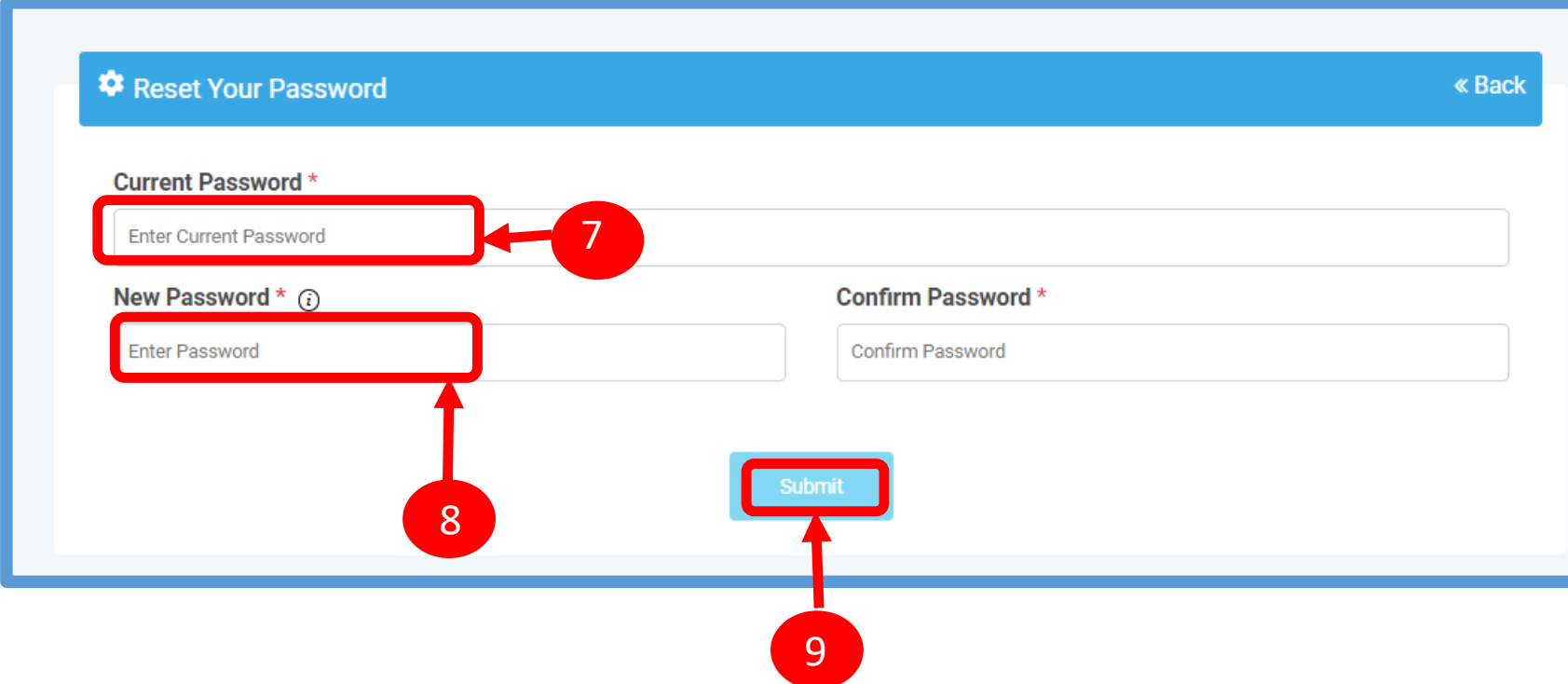


The screenshot shows the 'Update Profile' page. At the top, there is a blue header bar with a red box around the 'Update Profile' title (callout 4) and a '« Back' link. Below the header, the form contains several fields: 'Name*' (empty), 'Mobile No.*' (containing '9898989898'), 'Designation*' (containing 'Assistant managers'), and 'E-mail*' (empty). Below these is the 'Authorisation Document * ⓘ' section, which has a red box around its title (callout 5) and a file upload area with a 'Choose File' button and 'No file chosen' text. At the bottom right, there is a blue 'Submit' button with a red box around it (callout 6).

PROFILE – CHANGE PASSWORD

In the Password Reset Page user can change the password

- 7 Type the **old password** here.
- 8 Type the **new password** and then confirm it again (*Check the password strength*).
- 9 Press the **Submit** button and the new password will be activated instantly.



The screenshot shows a web form titled "Reset Your Password" with a "Back" link. The form contains three input fields and a "Submit" button. Red circles with numbers 7, 8, and 9, along with arrows, point to the "Current Password" field, the "New Password" field, and the "Submit" button respectively.

Reset Your Password « Back

Current Password *

Enter Current Password

New Password * ⓘ

Enter Password

Confirm Password *

Confirm Password

Submit

CHECK STATUS

APPLICATION – STATUS CHECK

1

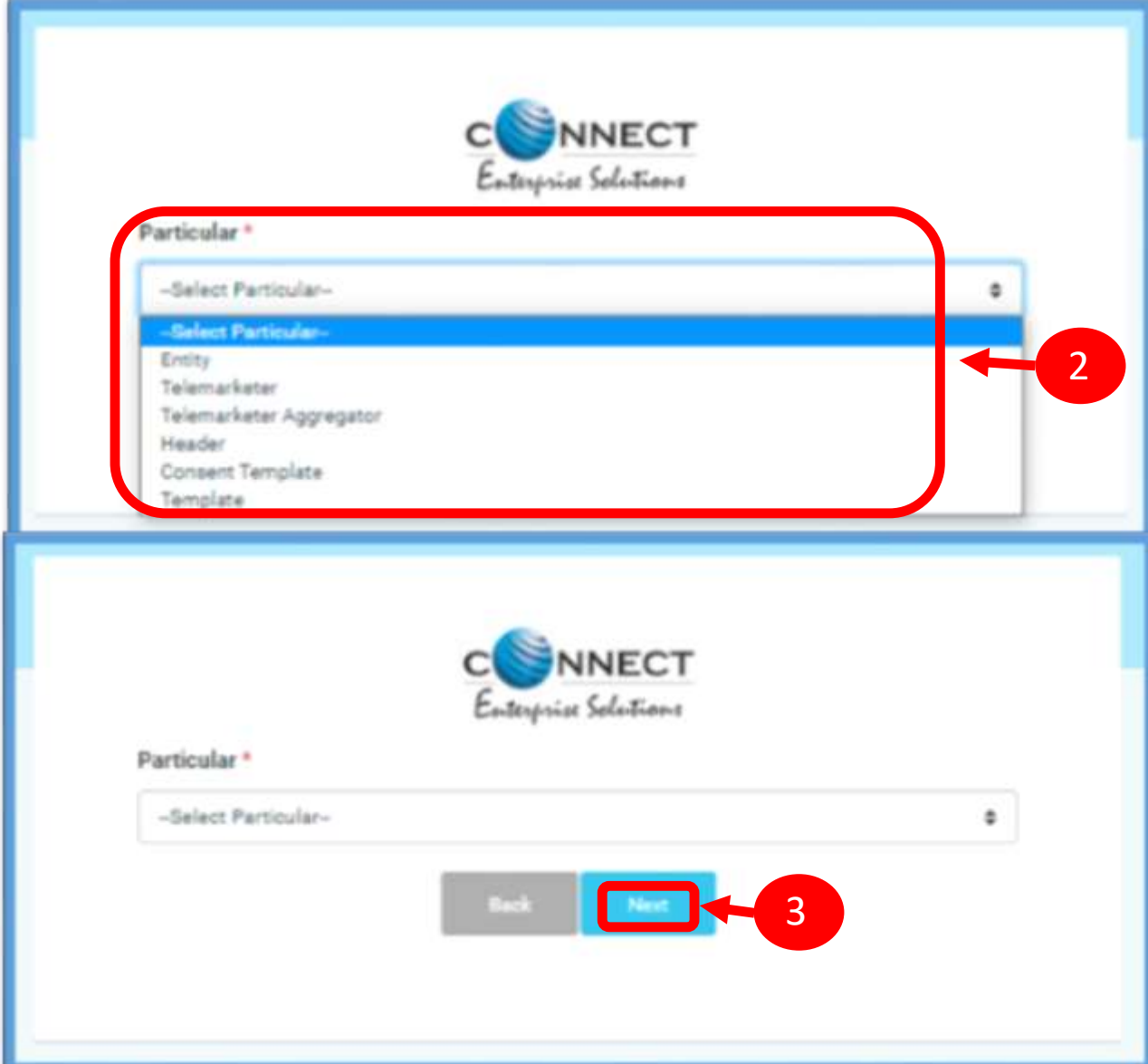
At Landing page click on check status to check the status of application submitted



STATUS CHECK – SELECTION OF MODULE

2 Select the option from the drop down list to check the status of option chosen

3 Click on **Next Button**



The first screenshot shows the 'Particular' dropdown menu open, with options: --Select Particular--, Entity, Telemarketer, Telemarketer Aggregator, Header, Consent Template, and Template. A red box highlights the dropdown menu, and a red arrow points to the 'Entity' option, labeled with a red circle containing the number 2.

The second screenshot shows the 'Particular' dropdown menu closed, displaying '--Select Particular--'. Below the dropdown are two buttons: 'Back' and 'Next'. A red box highlights the 'Next' button, and a red arrow points to it, labeled with a red circle containing the number 3.

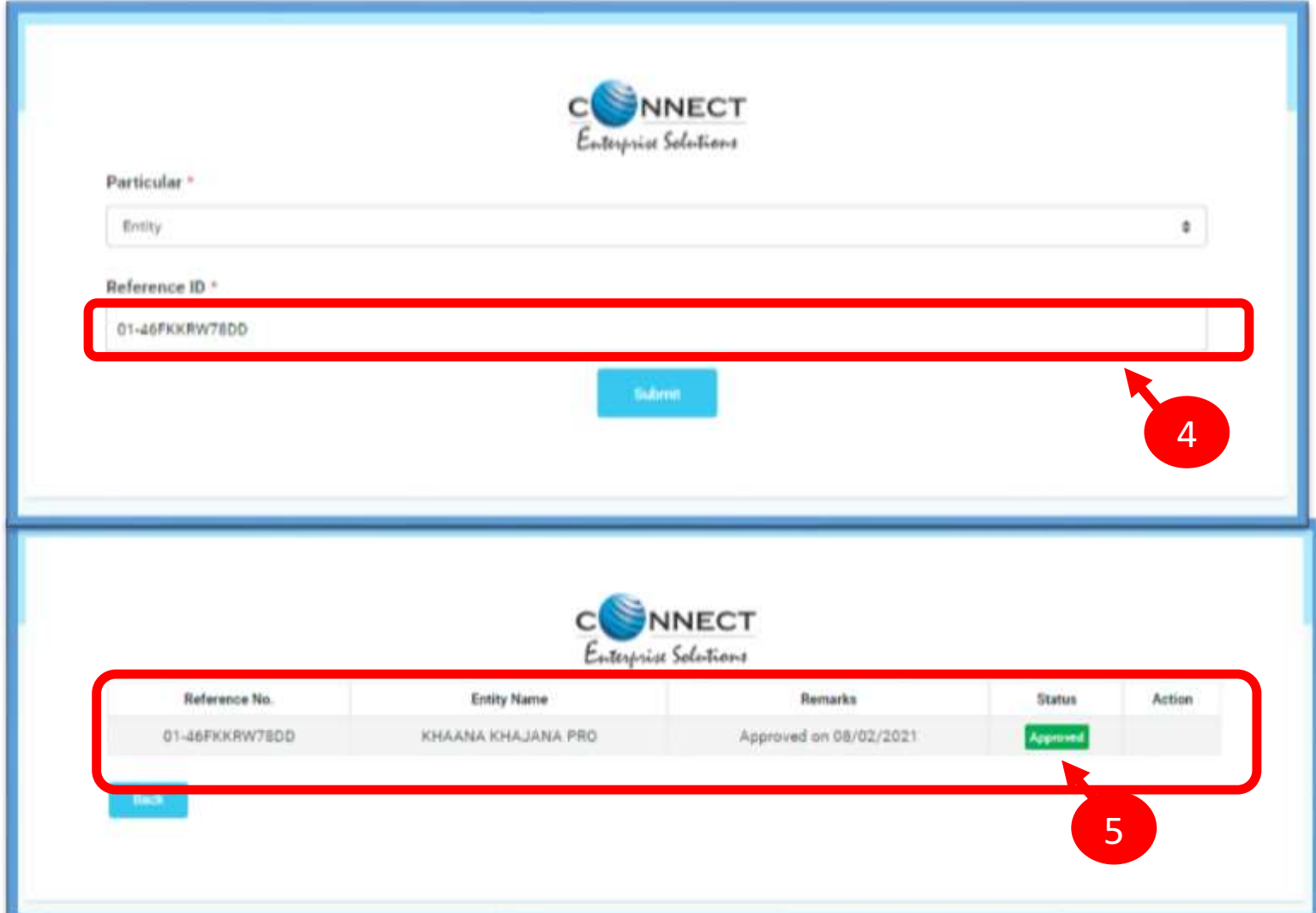
CHECK STATUS – REFERENCE ID SUBMISSION

4

Fill the Reference ID of Application & Click on **Submit Button**

5

Once submitted the status of application can be viewed.



CONNECT Enterprise Solutions

Particular *

Entity

Reference ID *

01-46FKRW78DD

Submit

CONNECT Enterprise Solutions

Reference No.	Entity Name	Remarks	Status	Action
01-46FKRW78DD	KHAANA KHAJANA PRO	Approved on 08/02/2021	Approved	

Back

ENTITY APPLICATION RE-SUBMISSION

CHECK STATUS – APPLICATION RE-SUBMISSION

- 1

If status is Rejected click on **Click Here Button** to re-submit the Registration form.
- 2

Enter OTP received on registered mobile number or email Id.
- 3

Click on Submit Button. Once submitted pre-filled registration form will appear for resubmission.

Note: New reference ID will be generated

The screenshot displays the CONNECT Enterprise Solutions interface. At the top, the logo is visible. Below it is a table with the following data:

Reference No.	Entity Name	Remarks	Status	Action
01-4MPKJJL9446	N	mm	Rejected	Click Here

Below the table is a 'Back' button. A green notification box states: "OTP has been sent to your registered Mobile number 9654528666 and E-mail ID n@yopmail.com. Please verify the same to complete the process." Below this, another table is shown with the same data as the first table. In the 'Action' column, there is an 'Enter OTP' input field and a 'Submit' button. A 'Resend OTP' link is also present below the input field. A 'Back' button is at the bottom left.

Red circles with numbers 1, 2, and 3 indicate the steps: 1 points to the 'Click Here' button, 2 points to the 'Enter OTP' input field, and 3 points to the 'Submit' button.

SYSTEM REQUIREMENTS

SYSTEM REQUIREMENT - SPECIFICATIONS

The website is best viewed on:

Requirements	Recommended
Web Browser	Google Chrome (Latest Version), Mozilla Firefox (Version 70.0.1)
Operating System	Windows 7, 8 ,10 Ubuntu 19.10
RAM	Minimum 4 GB
Internet Connectivity	1Mbps & Above

Thank You !