Message Types

Scheduling:

When the batch jobs are scheduled in the system admin, then an email is sent to an admin.

Invoice Message:

During the invoice generation process and when the bill run is performed the system will pick the PDF invoice template defined under the email section with message type as invoice message. This invoice is associated to the subscriber account in the PDF format and when the delivery of the bill is performed from billing management then this email gets triggered.

Credit Card Expiry Reminder:

When the "Credit Card Expiry Reminder" check box is selected at the business level then the reminder email is sent to the customers when their credit card is about to expired (usually a month before card expiry the email is sent). In this case the system will use email template message type credit card expiry reminder.

Invocation Activity Error Info:

When the invocation activity under workflow admin is defined and if the invocation activity is failed then the system will use this message type to notify the business that the invocation activity is failed.

Bill Run Process:

Under billing management when the bill run process is initiated system will notify the progress to the admin using bill run process.

Product File Status:

When uploading a product file from file upload in the Product Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

Product Priority File Status:

When uploading a product priority file from file upload in the Product Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

Package File Status:

When uploading a package file from file upload in the Product Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

Promotion File Status:

When uploading a promotion file from file upload in the Product Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

XML Invoice Message:

When the e-invoice is created and system creates the XML file, the invoice message (XML) is sent to the subscriber account and when the delivery of the bill is performed from billing management then this email gets triggered.

Import Message:

When a Business Unit clone is performed, the information related to the import status and login credentials will be sent using this message type mail template.

Bulk Emails:

If a business wants to schedule a promotional email and specify the future time to execute then the bulk email message type is used. These types of bulk emails can be sent to a business unit subscriber, specific market area subscriber, or a specific service.

to the subscriber account and need to send

Paypal WPS File:

The admin will be received email when the Paypal WPS file is uploaded into the system.

Credit Card Transaction:

When the credit card payment transaction is done by a subscriber then the transaction details will be sent via email to the customer using this email template.

Event Message:

Event message type email templates will be used to define an email template and cross-map them to the event category, which gives ability to trigger email notificatioins to subscribers once the event is recorded at the account level.

Adhoc:

Adhoc message type is to send the individual messages not linking with any of the event category mapping.

Account File Status

When uploading an account file from file upload in the Back Office Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

Order File Status

When uploading an order file from file upload in the Back Office Admin is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.
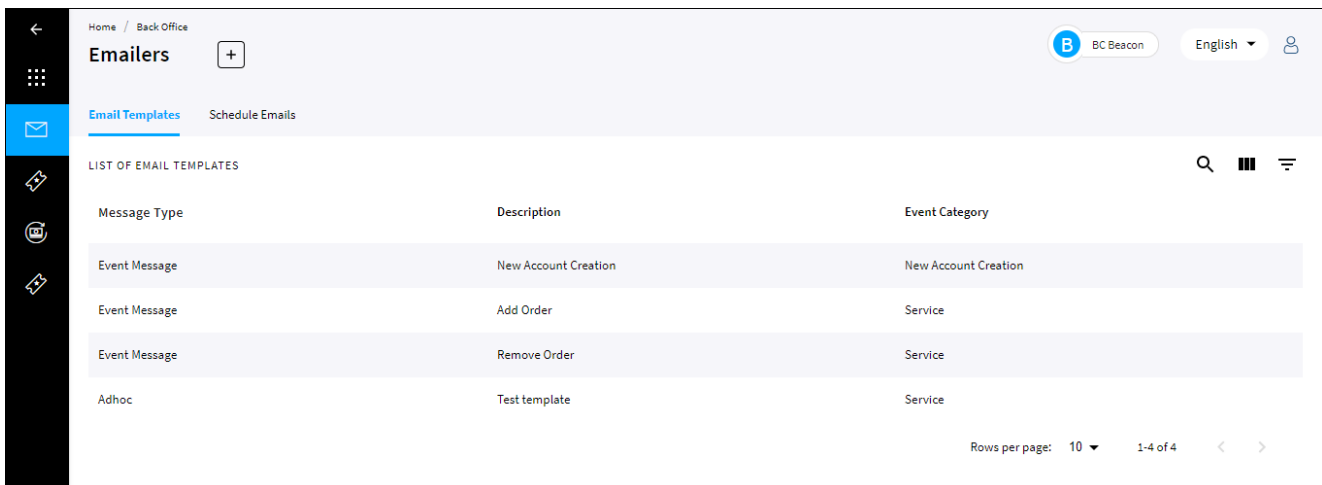
Manufacture File Status

When uploading a manufacturer file from file upload in the equipment inventory is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

Warehouse File Status

When uploading a warehouse file from file upload in the equipment inventory is performed, the number of records that are uploaded, status and the error file records are attached to this message type email and sent.

c.   An email will be sent to you with the reset password link. Click the reset password link to reset your password.

d.   The "**Update Your Password**" screen appears, as shown in the image below.

e.   Enter the new password in the **New Password** field.

f.   Re-enter the password in the **Confirm New Password** field.

g.   Click the **Update Password** button.

h.   The account will be updated with the new password. You can log in to your account with the new password.

Emailers

The Emailers tab is used to add/edit the email templates and schedule emails for the Business Units.

Adding a New Emailer

To add a new emailer, do the following:

1. On the **Emailers** screen of a Business Unit, click the Add (+) icon.
2. In the Basic Details section, enter the required details, as follows:
   a) On the **Title** field, enter the title for the email.
   b) On the **Email Subject** field, type the subject of the email.
   c) Select the message type that you will define an email message from the **Message Type** drop-down list.
   d) In the **Admin Email** field, enter the email id that you want the email to be sent.
   e) In the **Admin Name** field, enter the Admin name.
   f) Select the **Event Category** from the provided drop-down list.
   g) Enter the email id of the persons you want the email to be sent in the **Cc** and **Bcc** fields.

Note: *You can specify multiple email ids in the Cc and Bcc fields by separating each email id with a comma (,).*

3. Select **Plain Text** or **HTML** to send the email in the selected format.
4. In the **Email/Newsletter Message** section, in the **Email Body** text box, enter the message template that you want the message to be displayed on the customer's email.
5. Click **Preview** beside the text box area to view the email message in the Plain Text or HTML format.
6. Click the **Create** button.

Updating an Emailer

- Navigate to the **Emailer** screen of a Business Unit.
- In the **List of Email Templates** section, click the email template that you want to edit.
- The **Update Emailer** screen appears, make the necessary changes in the available fields, click **Update**.
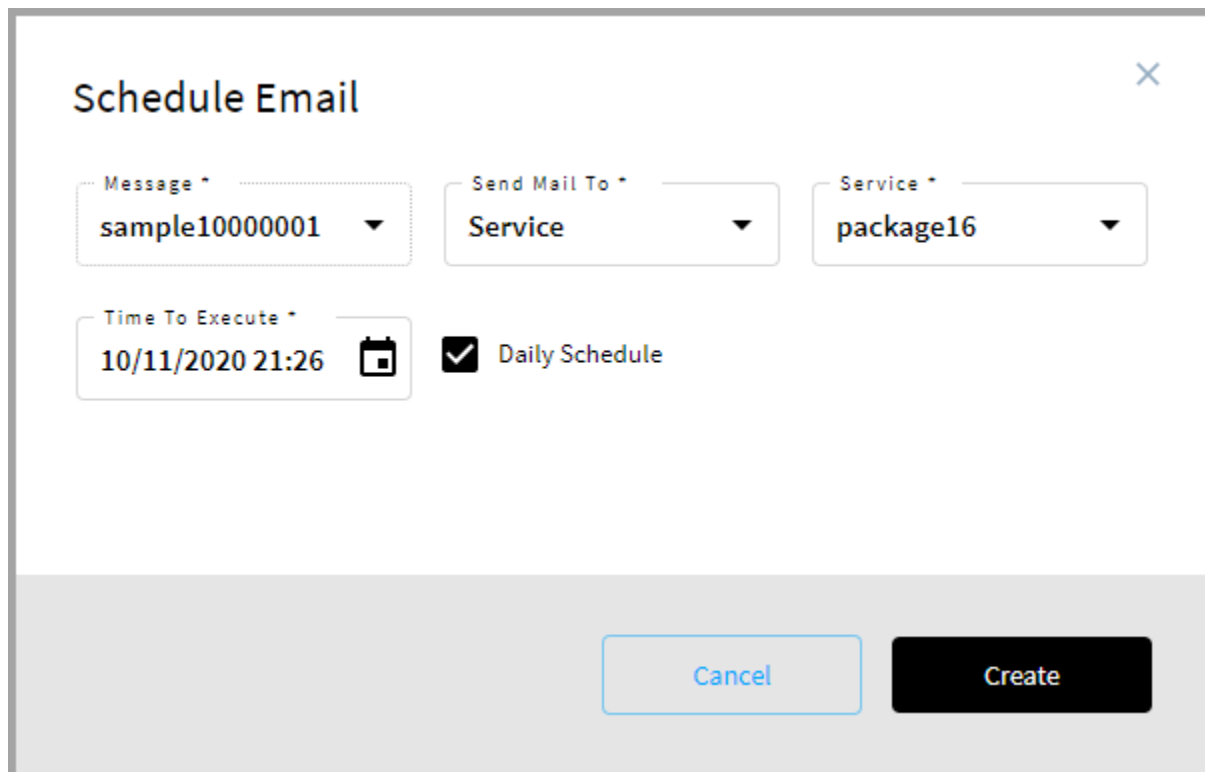
Note:
A user cannot modify the **Message Type** and **Event Category** fields on the Update Emailer screen.

Schedule Emails

A user can schedule the emails to send them later. This screen is to schedule the bulk emails on a specified time basis or daily for the DMA or Service.

Scheduling an Email

1. On the **Emailers** screen, on the **Email Templates** tab, click the message type email as Bulk Emails.
2. Click the **Schedule Emails** tab. The list of scheduled emails appears.
3. To schedule an email, click the Add (+) icon.
4. Enter the email id in the **Send Mail To** field.
5. Click the **Time To Execute** field to select the schedule date and time.
6. To schedule emails daily on the selected date and time, select the **Daily Schedule** checkbox.

Deleting a Scheduled Email

To delete the scheduled emails, do the following:

1. Click the **Email Templates** tab under the **Emailers** tab from the left menu bar.

2. Click a Bulk Email (Message Type) that you want to remove.
3. The **Update Emailer** screen appears.
4. Click the **Schedule Emails** tab.
5. Click the **Delete** (🗑) icon in the **Actions** column to delete the scheduled email from the **List of Scheduled Emails**.

Coupon Generation

Coupons generation Permission is based on the User's BU Group Permission. Login users having this permission can generate & edit the Coupons.

Adding a New Coupon/Voucher

To add a new coupon/voucher, do the following:

1. Click the **Coupons** from the left menu.

2. On the **Coupons** screen of a Business Unit, click the Add (+) icon. The Coupons default screen appears.

3. Click **Add** (+) icon for generating the Coupon.

4. The New Coupon/Voucher generation screen appears as shown below.

5. **Coupon Prefix:** Prefix of the Coupon (ex: TestC, Hal, CD, Friday, etc.)

6. **Batch Name:** Name of the Batch for the Coupons (Ex: Test Coupon, Christmas, etc.)

7. **Retailer:** Coupons can be generated on the Retailer selection like (AT&T, Vodafone, Verizon, Idea, etc.)

8. **Starting Date:** The date from when the Coupon is available for the user.

9. **Expiration Date:** Users can define the Day the Coupon Expires.

10. **Coupon Requestor:** Indicates the name of the requestor who has requested the coupons.

11. **Credited as Wallet Top-up:**
    o For generating the Coupon for wallet top-up, click the toggle switch to enable and enter Amount.
    o For generating the Coupon as a voucher, click the toggle switch to disable it.

---

12. **Discount Type:** User can define the Coupon Type – e.g., Free, Flat, Flat Off, Percentage, Percentage-Off, and Validity Extension.

13. **Amount/Percentage:** For the type selected, the Amount/Percentage field appears.

14. **Period & Duration:** The Period of Coupon applied can be No. of days or No. of Months, with the respective selection of period the Durations of the Coupon implies.

15. **Make Prefix as Coupon Code:** On checking the check, box Prefix will be saved as Coupon Code.

16. **No. of Coupons:** The user can provide the Number of Coupons generated for the Batch. In the Case of "*Prefix as Coupon Code,*" the No. of Coupons will be "1".

17. **Coupon Priority:** is used to set the generic coupon display on a priority order basis as generated in the business and mapped to a subscription and offer type.

18. **Coupon Length:** Length of the coupon code you want to be generated.

19. **Multiple Redemptions:** If this toggle switch is selected, the user can define the Maximum Redemptions for a Coupon.

20. **Maximum Redemptions:** Allows the No. of Redemptions for a Coupon.

21. **Multiple Redemptions by Single User:** Check box allows customers to redeem a single Coupon on their account for No. of Maximum redemptions by Single User.

22. **Maximum redemptions by Single User:** Allows the No. of Redemptions for a single User.

23. Check the **Case sensitive** check box if you want to generate coupon codes in Capital letters.

24. **isGift:** If the check box is selected, the Coupon can be given to others.

25. **Inheritable:** If the check box is selected, the Coupon can be inheritable.

26. **Is All Items Mandatory**: If this check box is selected, then all the items are mandatory.

27. **Skip Payment Method**: If the check box is selected, then the payment method will be skipped after applying the Coupon.

28. **Coupon Description**: Enter the coupon description.

29. **Campaign Info**: Enter the campaign Info details.

30. **Success Message**: Enter the success message that is to be displayed to the user.

31. **Warning Message**: Enter the warning message that is to be displayed to the user.

32. **Applicable Products:** User can select the no. of applicable product to the Coupon (Ex: Flat 30% OFF Coupon for product **Neon).**

33. **Applicable Packages:** The user can select the no. of application packages to the Coupons.

34. **Offer Types**: The user can select the offer types for the Coupons.

35. **Applicable Payment Modes**: The user can select the applicable payment modes for the Coupon.

36. Click the **Create Coupon** button to generate coupons (the generation time of coupons also depends on the No. of Coupons the user generates).

37. Once Coupons is generated, "**Coupons Generated Successfully**" message is displayed.

Coupon Search

Search the coupons by using the various options. To search the coupons, do the following:

1. On the **Coupons** screen, enter the field value to search by Batch Name, Prefix, Coupon Code, Status, Expiration Date From/To.

2. Click the **Search** button. The coupon search results are displayed, as shown below.

3. Click the **Enable Advance Search** toggle switch to enable the advance search.

4. A user can search with coupon batch for the Applicable Products and Applicable Payment Modes listed in the lists. To search with coupon batch, click the **Coupon Batch Search** button.

5. The searched coupons are displayed in the Search Result list, as shown below.