



Welcome to Connect Enterprise Solutions

# USER MANUAL

## ENTITY

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# WEBSITE / LANDING PAGE

1 Visit <https://www.pingconnect.in> URL to Login/Register yourself as Entity/Telemarketer

✗ Incorrect URL: [www.pingconnect.in](http://www.pingconnect.in)

✓ Correct URL: <https://www.pingconnect.in>

Note: Use the <https://www> before the URL to have the secure user experience.

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



# REGISTRATION

# REGISTRATION – SELECT TYPE OF REGISTRATION

1

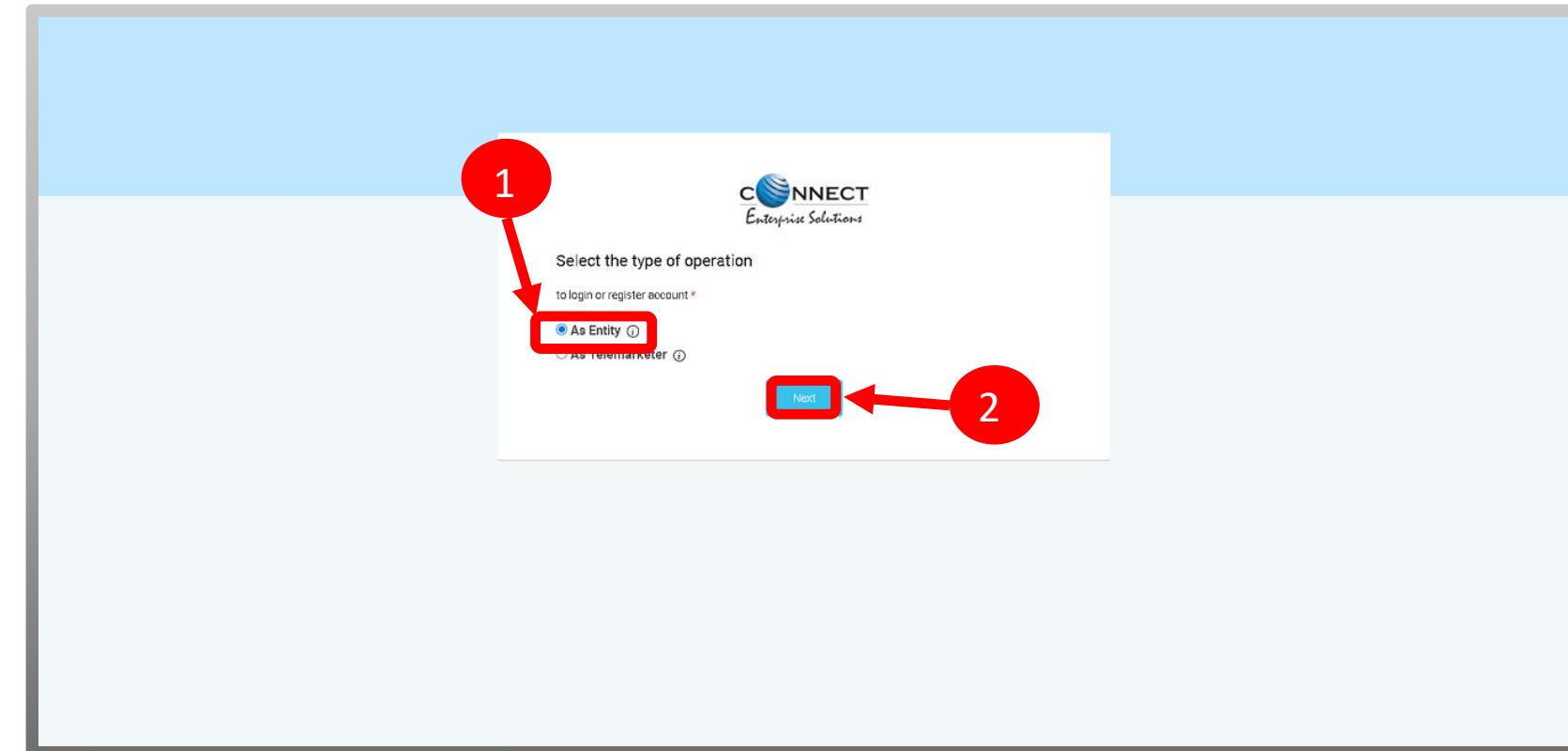
To register yourself as an Entity on the portal, select the “As Entity” option in the Type of Operation.

i

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.



## 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 an 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

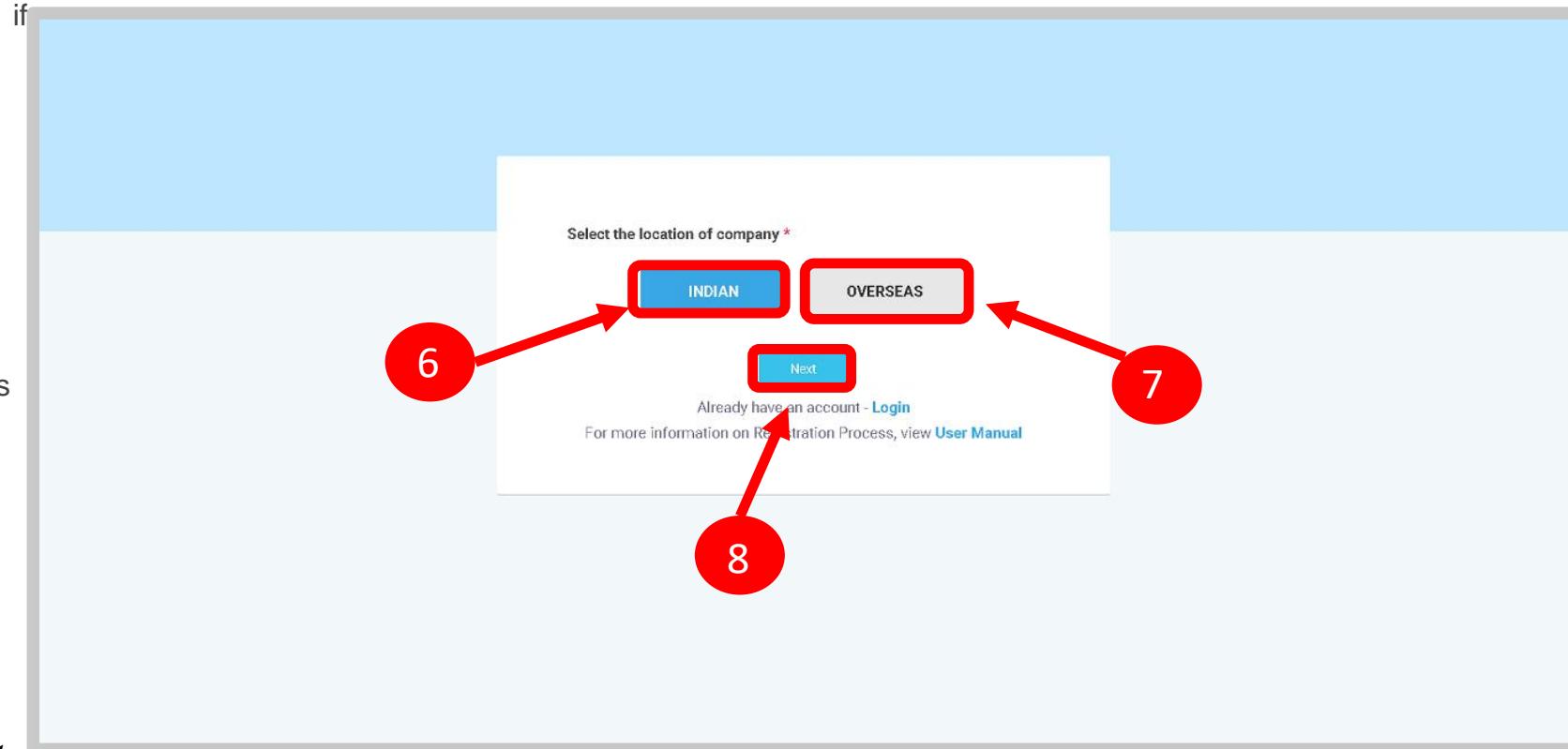
Select the Location of Company. Choose **Indian** if your company is Indian Origin.

7

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

8

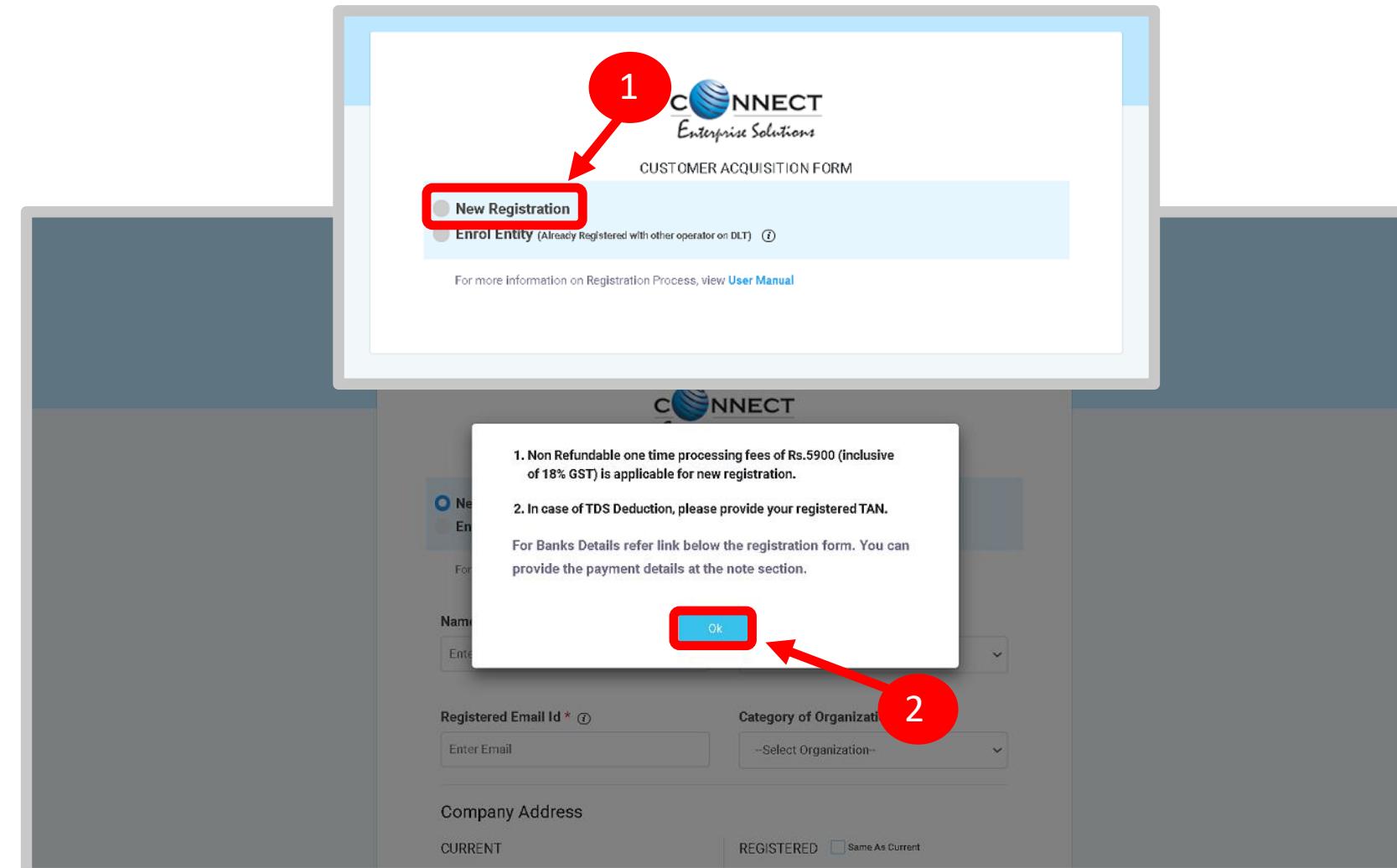
After selecting the company's location click **Next** Button for further steps.



# NEW ENTITY REGISTRATION

## NEW ENTITY REGISTRATION - FEE DETAILS

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



The screenshot shows the 'Customer Acquisition Form' interface. At the top, there are two radio button options: 'New Registration' (selected) and 'Enrol Entity (Already Registered with other operator on DLT)'. A red circle with the number '1' points to the 'New Registration' button. Below the buttons, a message reads: 'For more information on Registration Process, view [User Manual](#)'. A modal window is displayed in the center, containing payment terms and an 'OK' button. A red arrow points from a red circle with the number '2' to the 'OK' button. The modal text includes: '1. Non Refundable one time processing fees of Rs.5900 (inclusive of 18% GST) is applicable for new registration.' and '2. In case of TDS Deduction, please provide your registered TAN.' It also states: 'For Banks Details refer link below the registration form. You can provide the payment details at the note section.' The background of the main form shows fields for 'Name', 'Enter Email', 'Category of Organization', 'Company Address', 'CURRENT', 'REGISTERED', and 'Same As Current'.

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

Duly fill the customer acquisition form and submit.

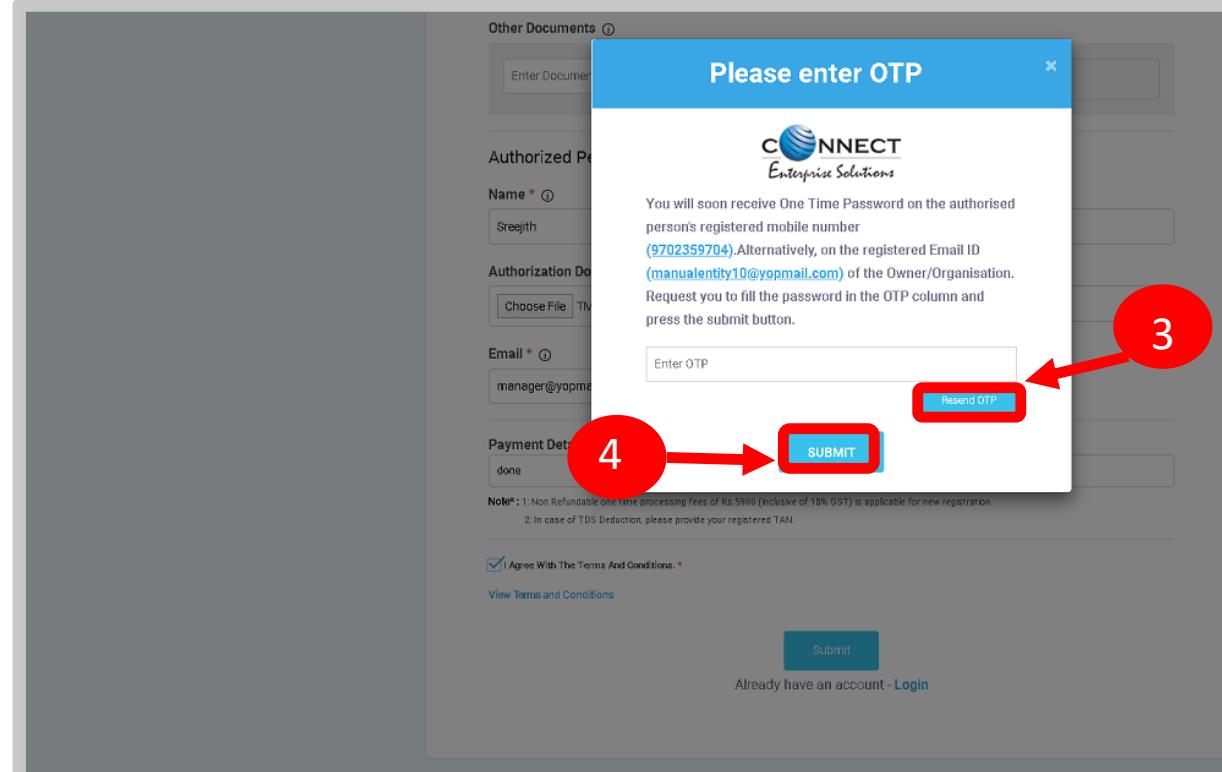
## NEW ENTITY REGISTRATION - SIGN UP/ OTPVERIFICATION

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



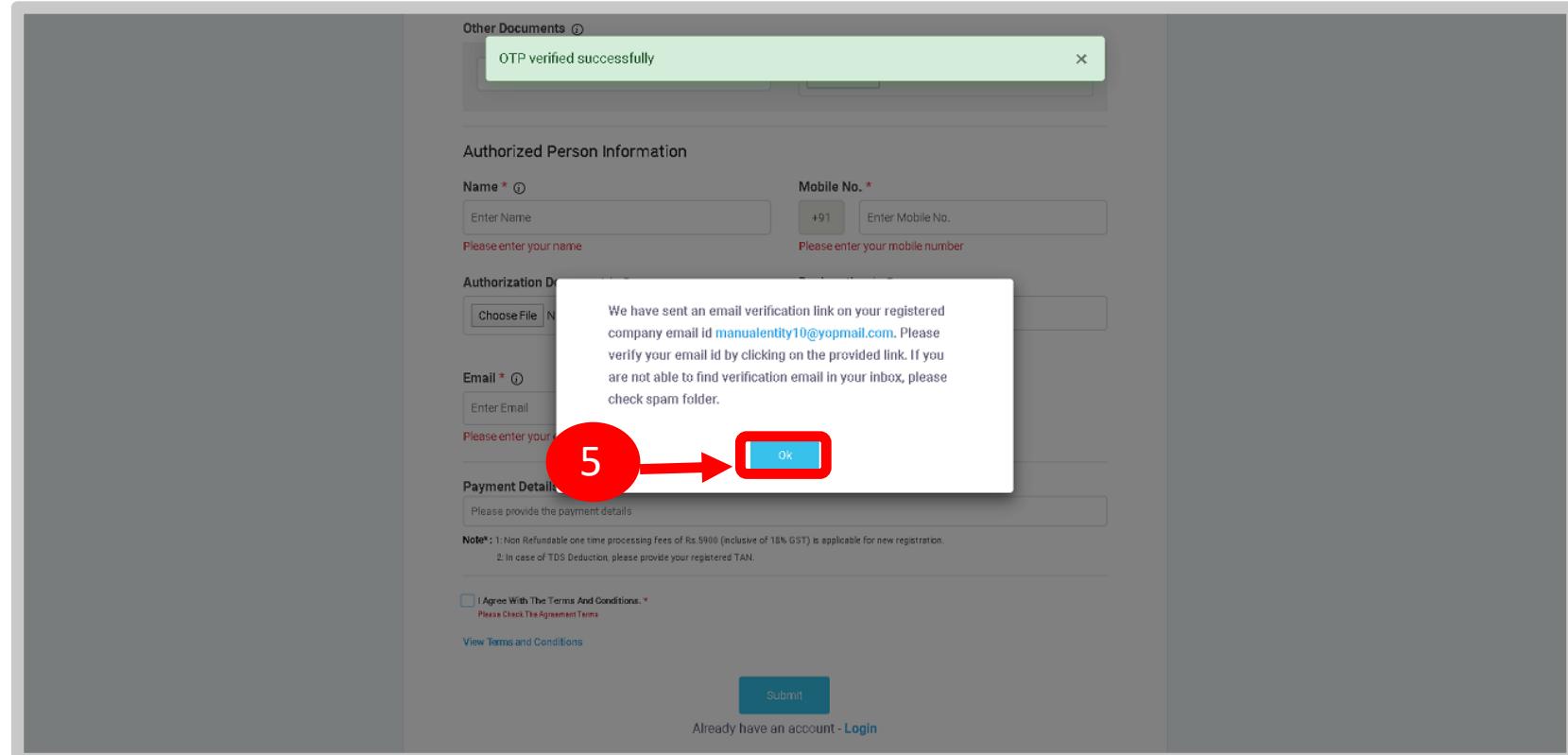
The screenshot shows a modal window titled "Please enter OTP". The window contains the following text: "You will soon receive One Time Password on the authorised persons registered mobile number (9702359704). Alternatively, on the registered Email ID (manualentity10@yopmail.com) of the Owner/Organisation. Request you to fill the password in the OTP column and press the submit button." Below this text is a text input field labeled "Enter OTP" and a blue "SUBMIT" button. To the right of the "Enter OTP" field is a red "Resend OTP" button, which is circled with a red arrow and labeled "3". A red arrow also points from a red circle labeled "4" to the "SUBMIT" button.

## 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 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 a registration form for a new entity. At the top, a green notification bar says "OTP verified successfully". Below it, there's a modal dialog box with the following content:

We have sent an email verification link on your registered company email id [manualentity10@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.

At the bottom right of the modal, there is a blue "Ok" button. A red circle with the number "5" and a red arrow point to this "Ok" button.

The main form behind the modal includes fields for:

- Other Documents: A note saying "OTP verified successfully".
- Authorized Person Information: Fields for Name (with placeholder "Enter Name") and Mobile No. (with placeholder "+91 Enter Mobile No.").
- Authorization Details: A file upload field ("Choose File") and a note asking to enter the company name.
- Email: A field for "Email" with placeholder "Enter Email" and a note asking to enter the company email.
- Payment Details: A note asking to provide payment details.
- Notes: A section with two notes: 1. Non-refundable one-time processing fees of Rs 5900 (inclusive of 18% GST) are applicable for new registration. 2. In case of TDS deduction, please provide your registered TAN.
- Agreement: A checkbox for "I Agree With The Terms And Conditions." followed by a link "Please Check The Agreement Terms".
- Links: "View Terms and Conditions" and "Submit".
- Footer: "Already have an account - [Login](#)".

## NEW ENTITY REGISTRATION - EMAIL VERIFICATION CONFIRMATION

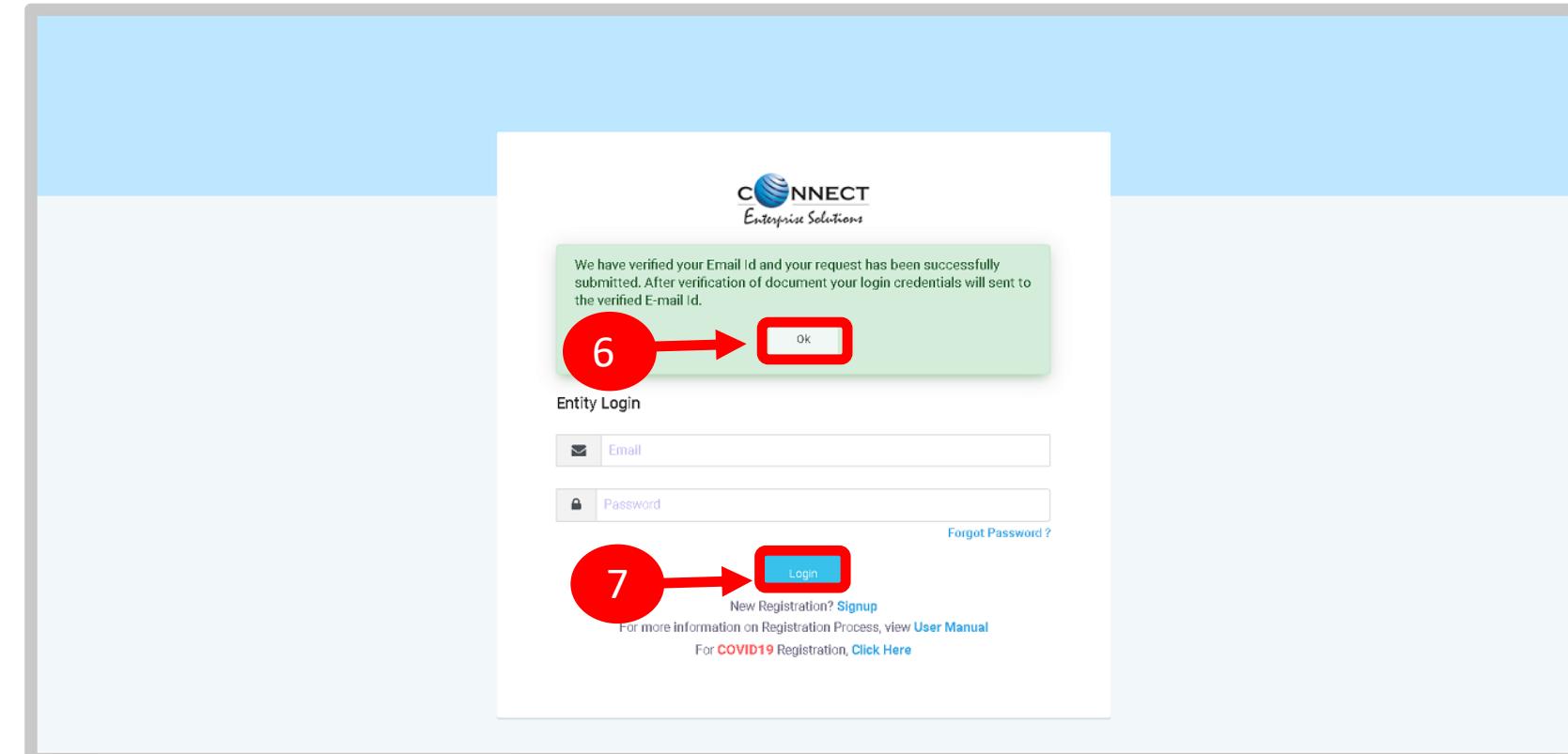
6

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**



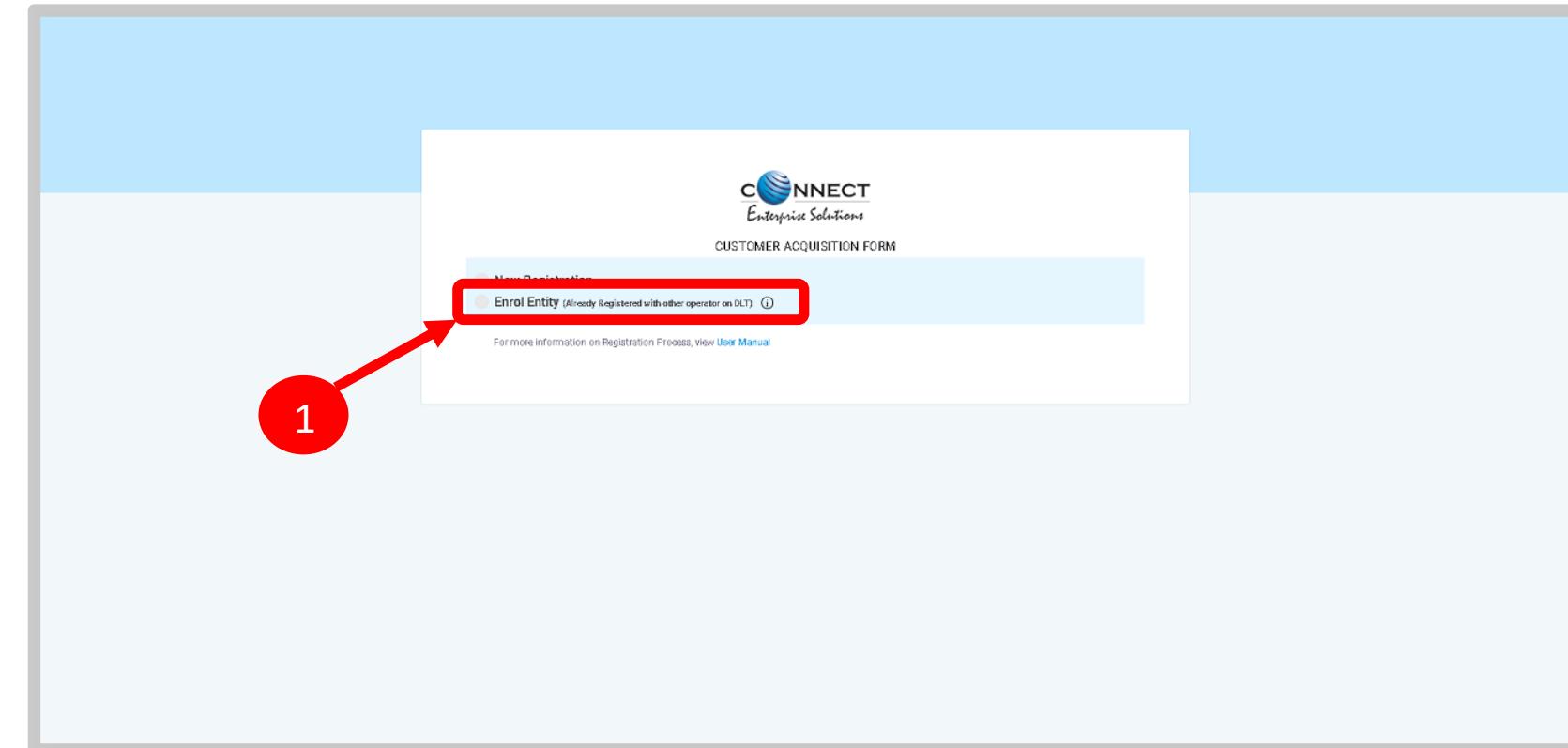
# ENROL ENTITY (ALREADY REGISTERED)

## ENTITY ENROLMENT – INITIATION

1

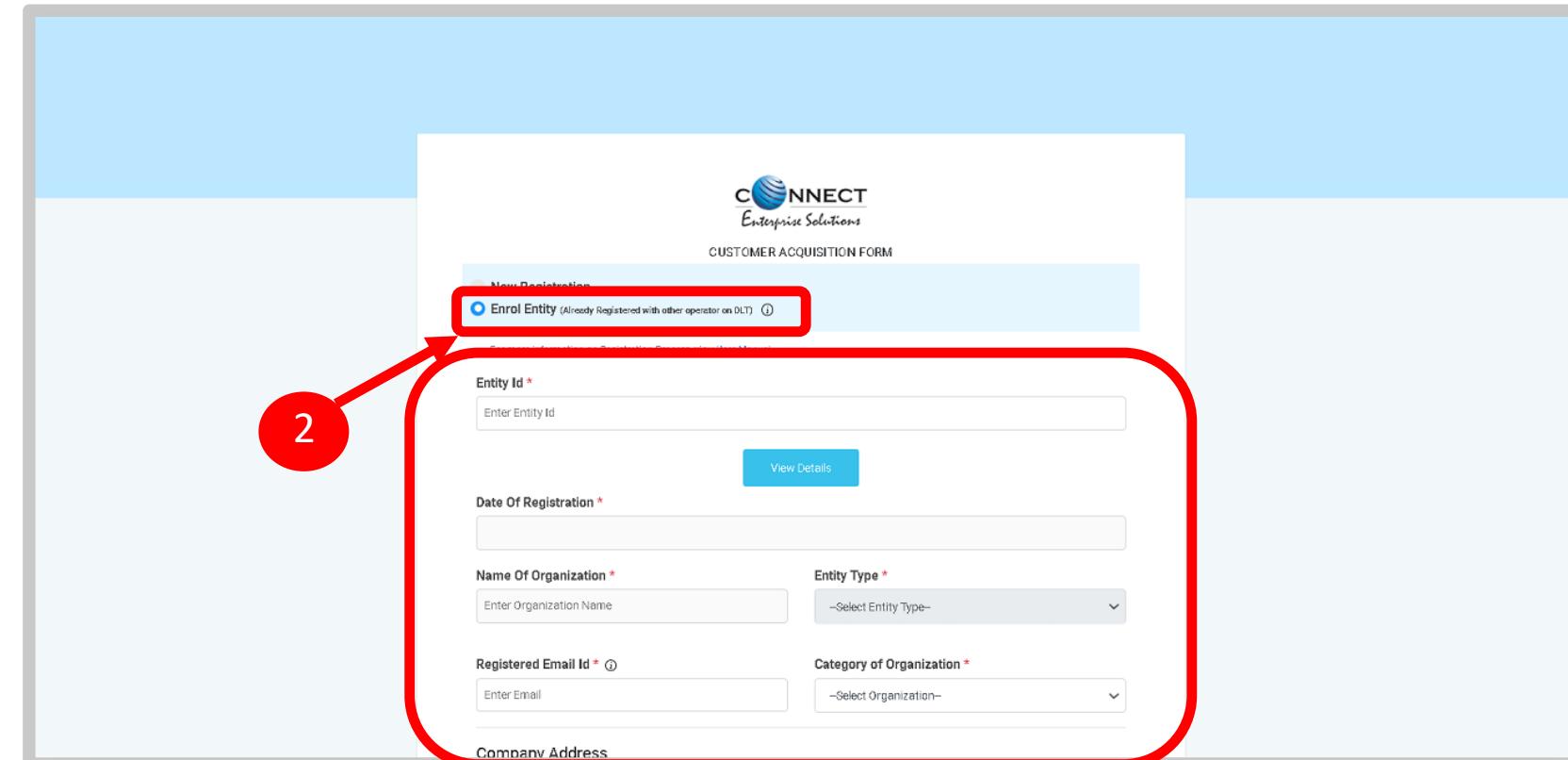
Choose **Enrol Entity** if your company is already registered on different operator and Fill the form.

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



## 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



The screenshot shows a 'Customer Acquisition Form' with the 'Enrol Entity' option selected. A large red circle labeled '2' points to the 'Entity Id' input field, which is highlighted with a red box. Another red arrow points from a red circle labeled '3' to the 'View Details' button.

New Registration

Enrol Entity (Already Registered with other operator on DLT) (i)

Entity Id \*  
Enter Entity Id

Date Of Registration \*

Name Of Organization \*  
Enter Organization Name

Entity Type \*  
Select Entity Type

Registered Email Id \* (i)  
Enter Email

Category of Organization \*  
Select Organization

Company Address

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

# ENTITY ENROLMENT – OTP /EMAIL VERIFICATION PROCESS

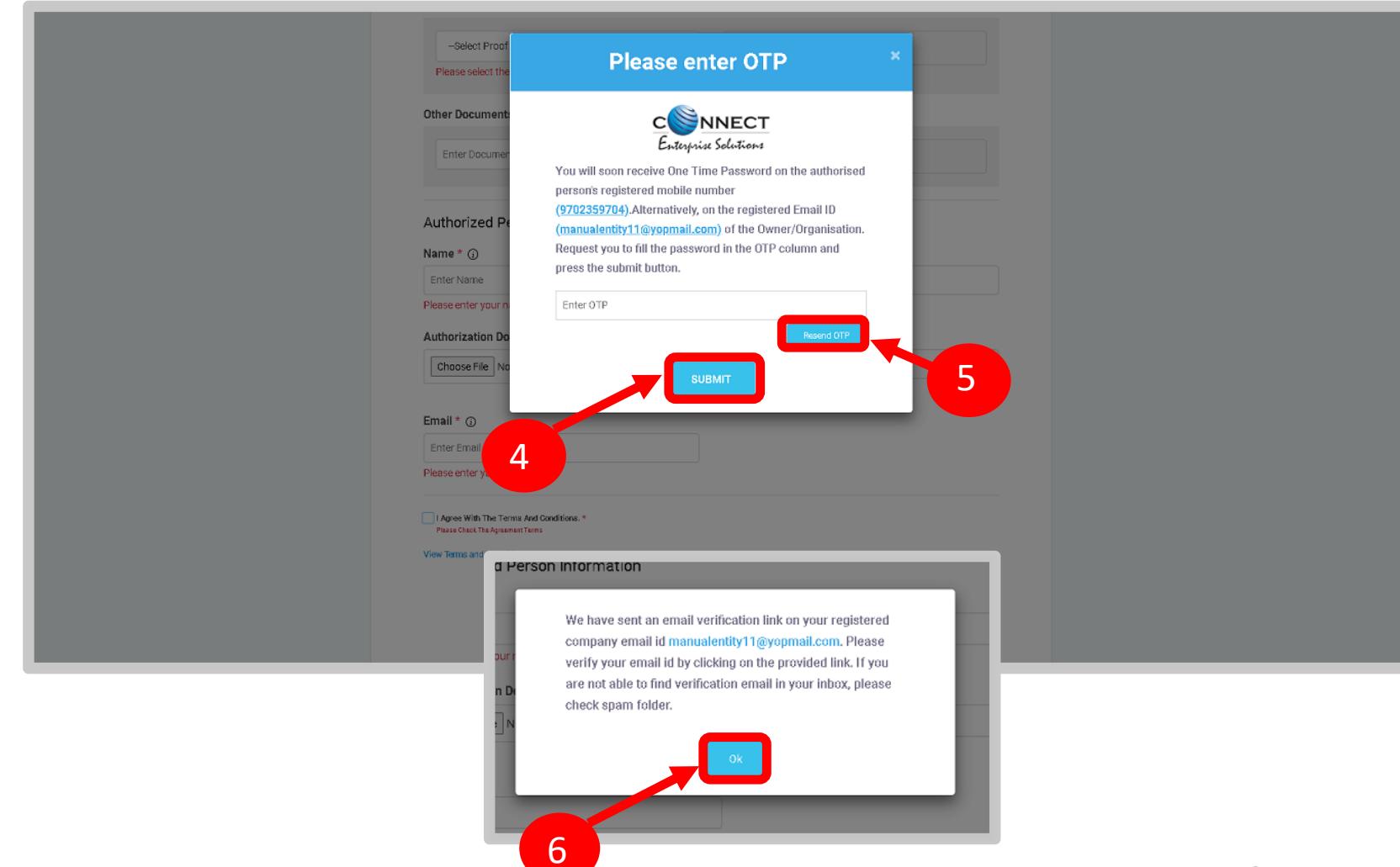
4 You will receive an **One Time Password (OTP)** on your registered Mobile number and Email ID to verify mobile number.

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.

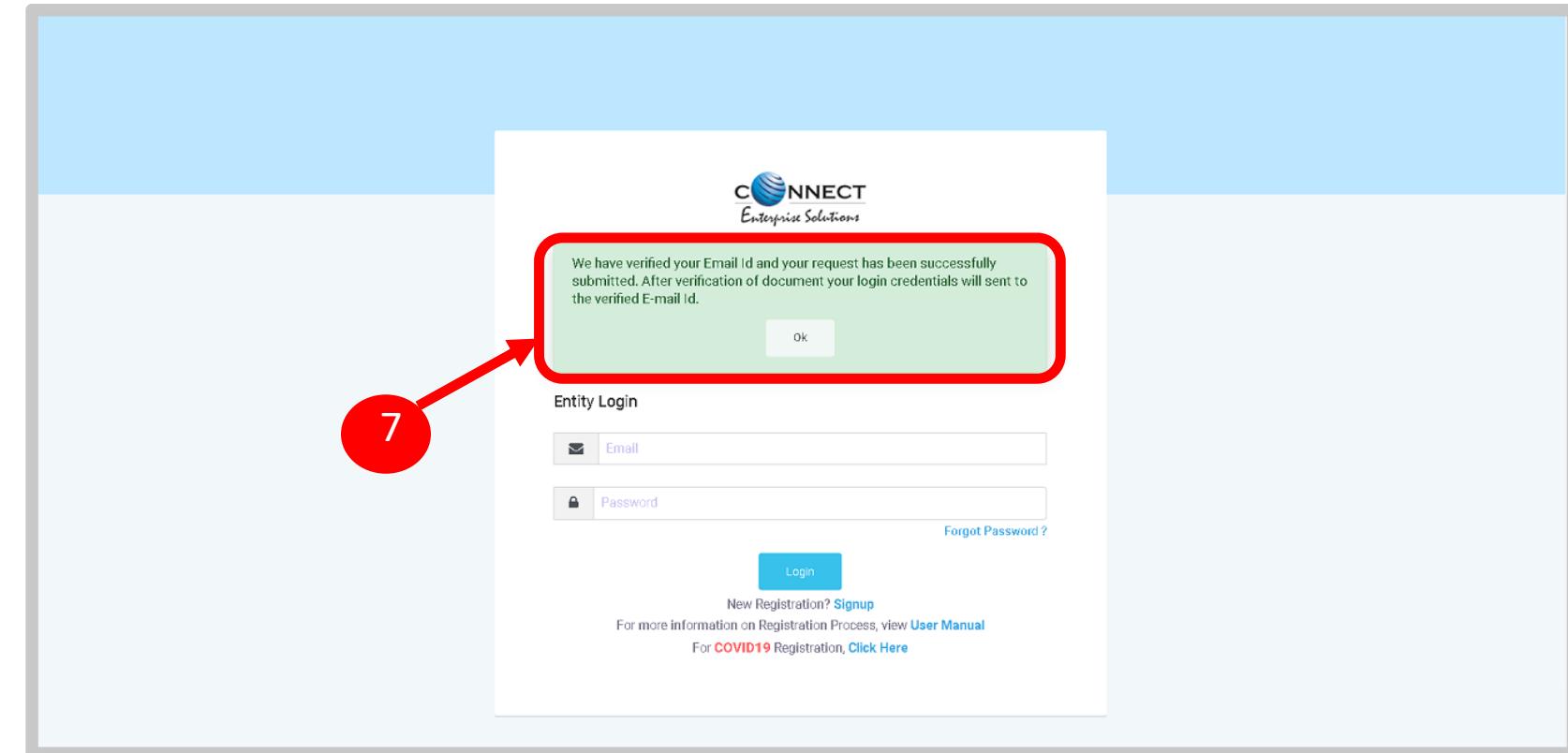
Please check your email inbox as well as spam folder for the verification link.



## ENTITY ENROLMENT - SUCCESSFUL REQUEST SUBMISSION

7

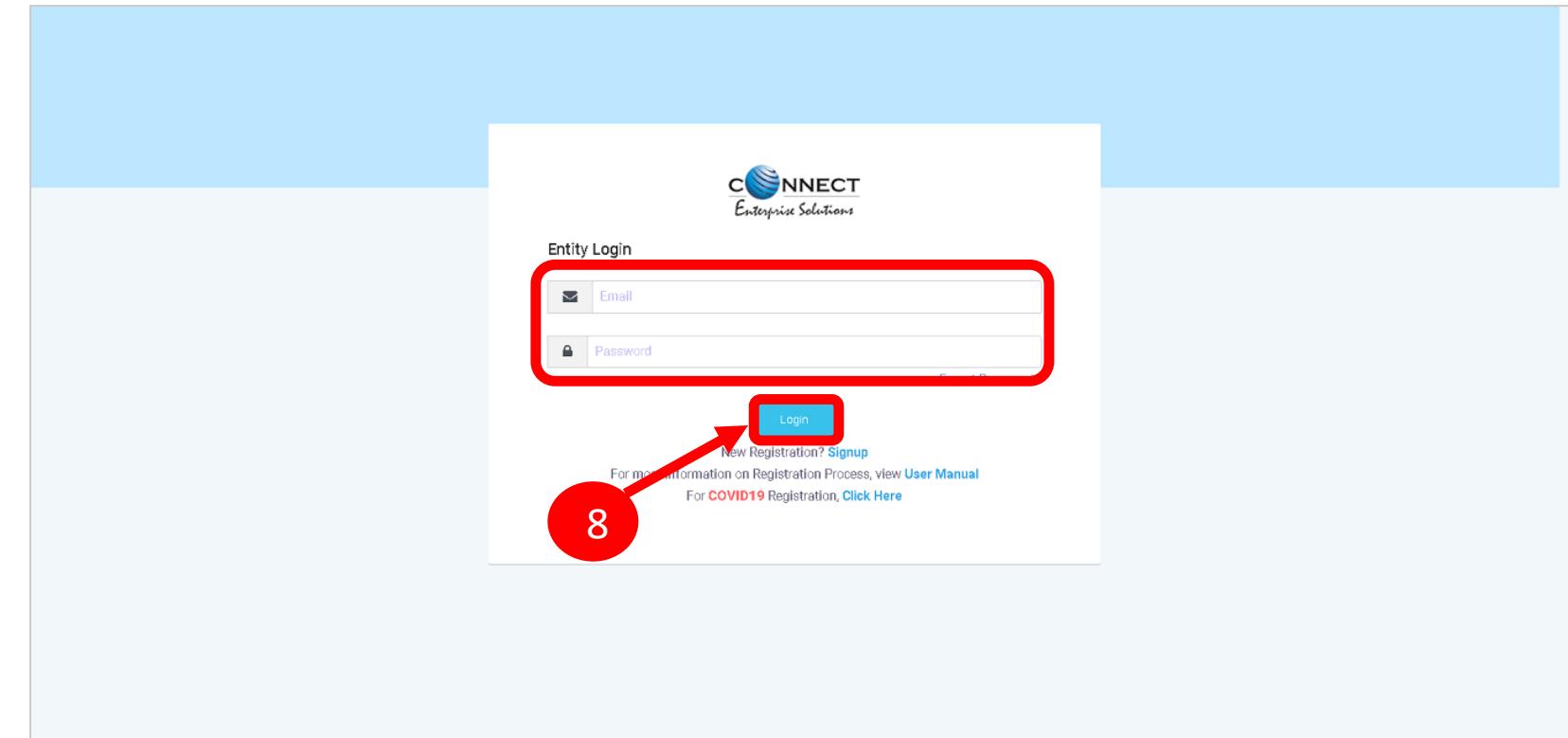
After email verification Click **OK.** button to Confirm. Once Operator approves your application, you will receive login credentials on your registered email id.



## 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.



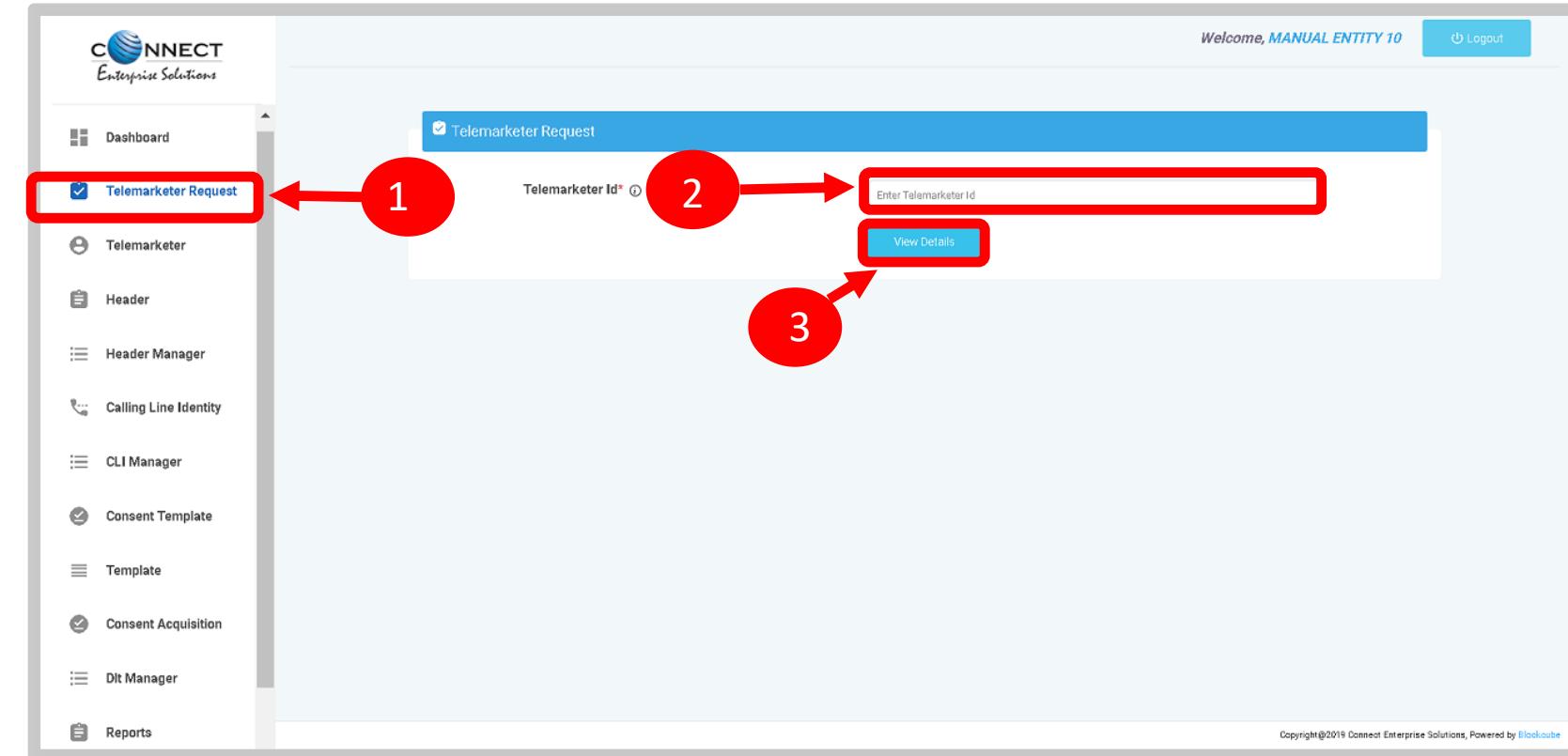
# ENTITY – TELEMARKETER REQUEST

# TELEMARKETER REQUEST – TM ID SUBMISSION

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

2 Enter **Telemarketer ID** and click on view details

3 Click on **view details**



# TELEMARKETER REQUEST – REQUEST SUBMISSION

4

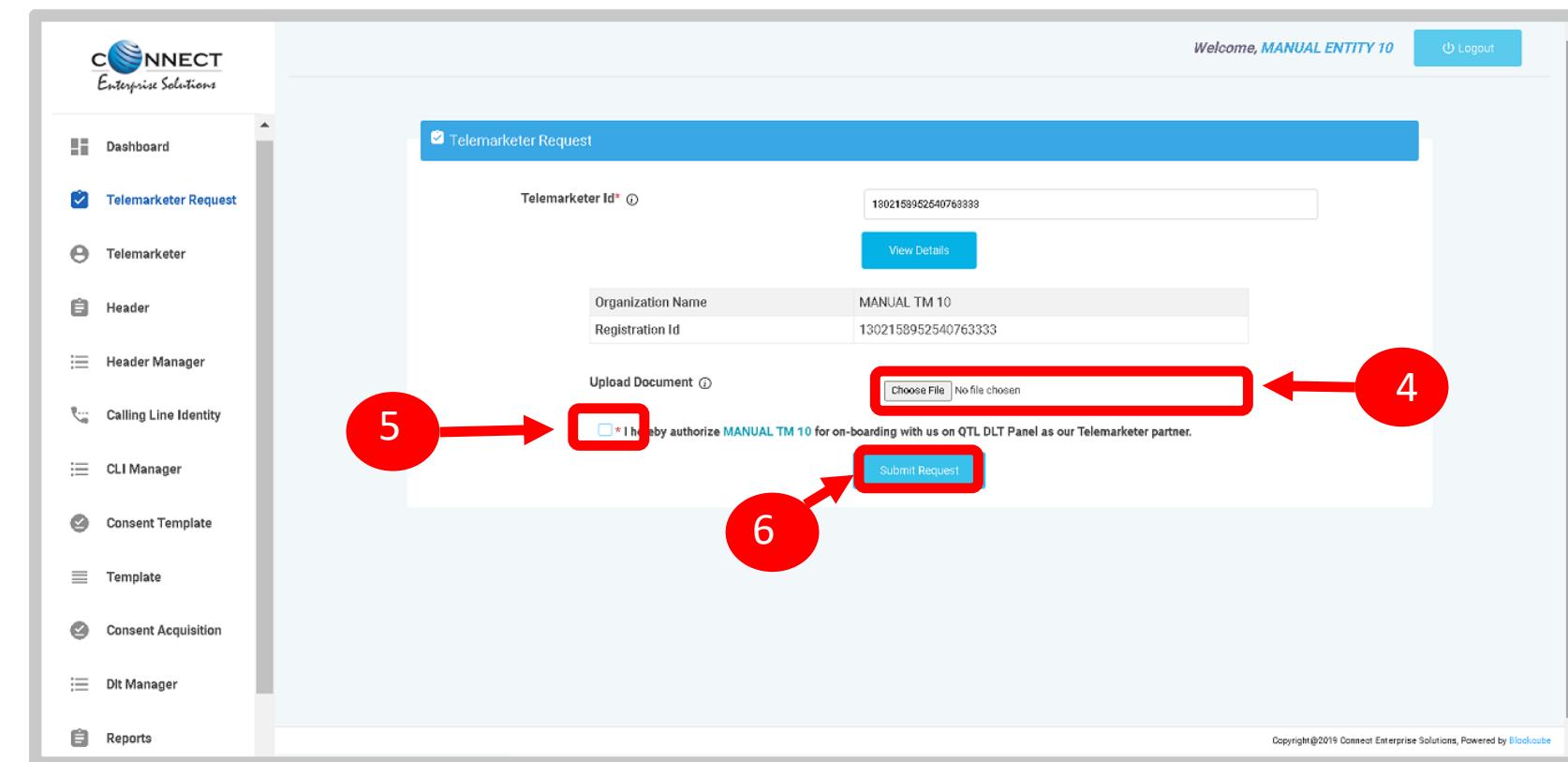
**Upload** the Authorized document

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



Welcome, MANUAL ENTITY 10 Logout

**Telemarketer Request**

Telemarketer Id*	1802158952540763333
<a href="#">View Details</a>	
Organization Name	MANUAL TM 10
Registration Id	1302158952540763333

Upload Document

Choose File | No file chosen

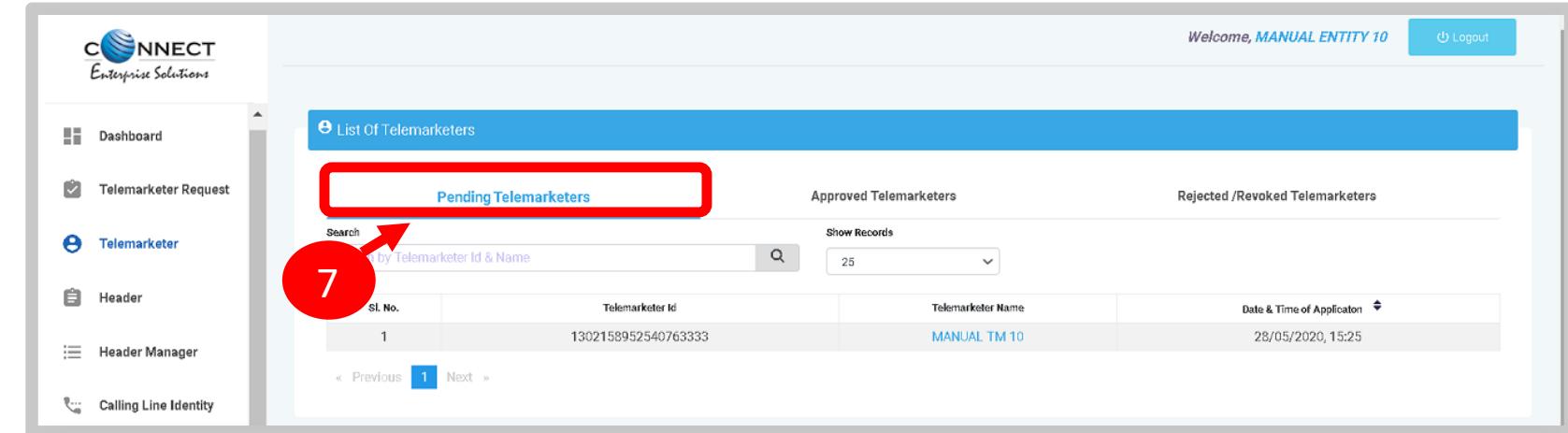
\* I hereby authorize MANUAL TM 10 for on-boarding with us on QTL DLT Panel as our Telemarketer partner.

**Submit Request**

# TELEMARKETER REQUEST – REQUEST STATUS

7

Once the request is submitted it can be viewed in the **Pending Telemarketers** section.



Welcome, MANUAL ENTITY 10 Logout

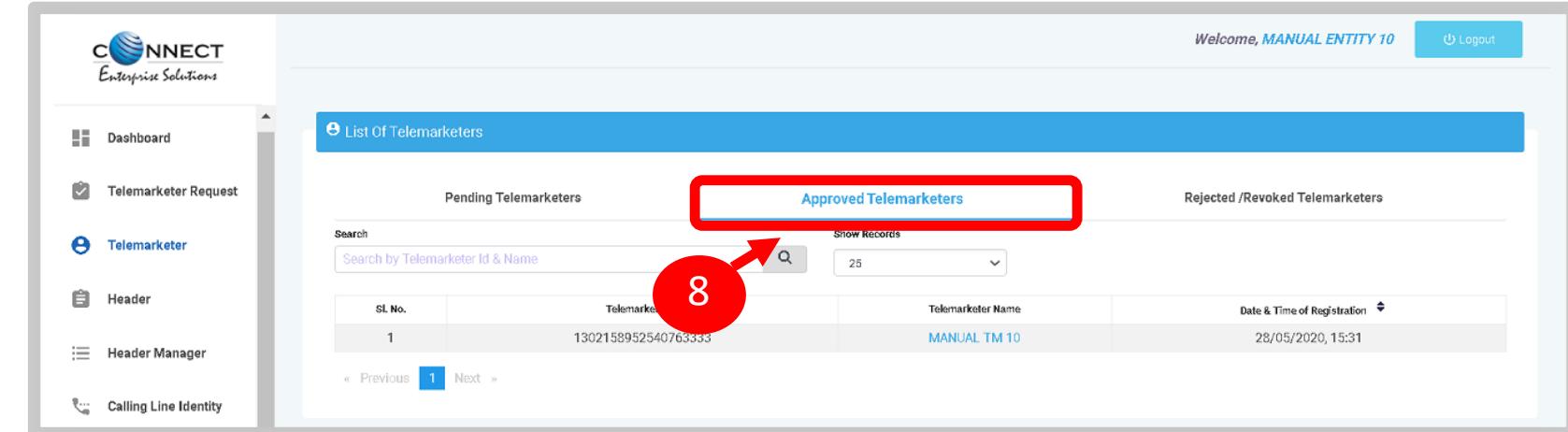
**Pending Telemarketers**

Search  by Telemarketer Id & Name Q Show Records 25

SL. No.	Telemarketer Id	Telemarketer Name	Date & Time of Application
1	1302158952540763333	MANUAL TM 10	28/05/2020, 15:25

8

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



Welcome, MANUAL ENTITY 10 Logout

**Approved Telemarketers**

Search  by Telemarketer Id & Name Q Show Records 25

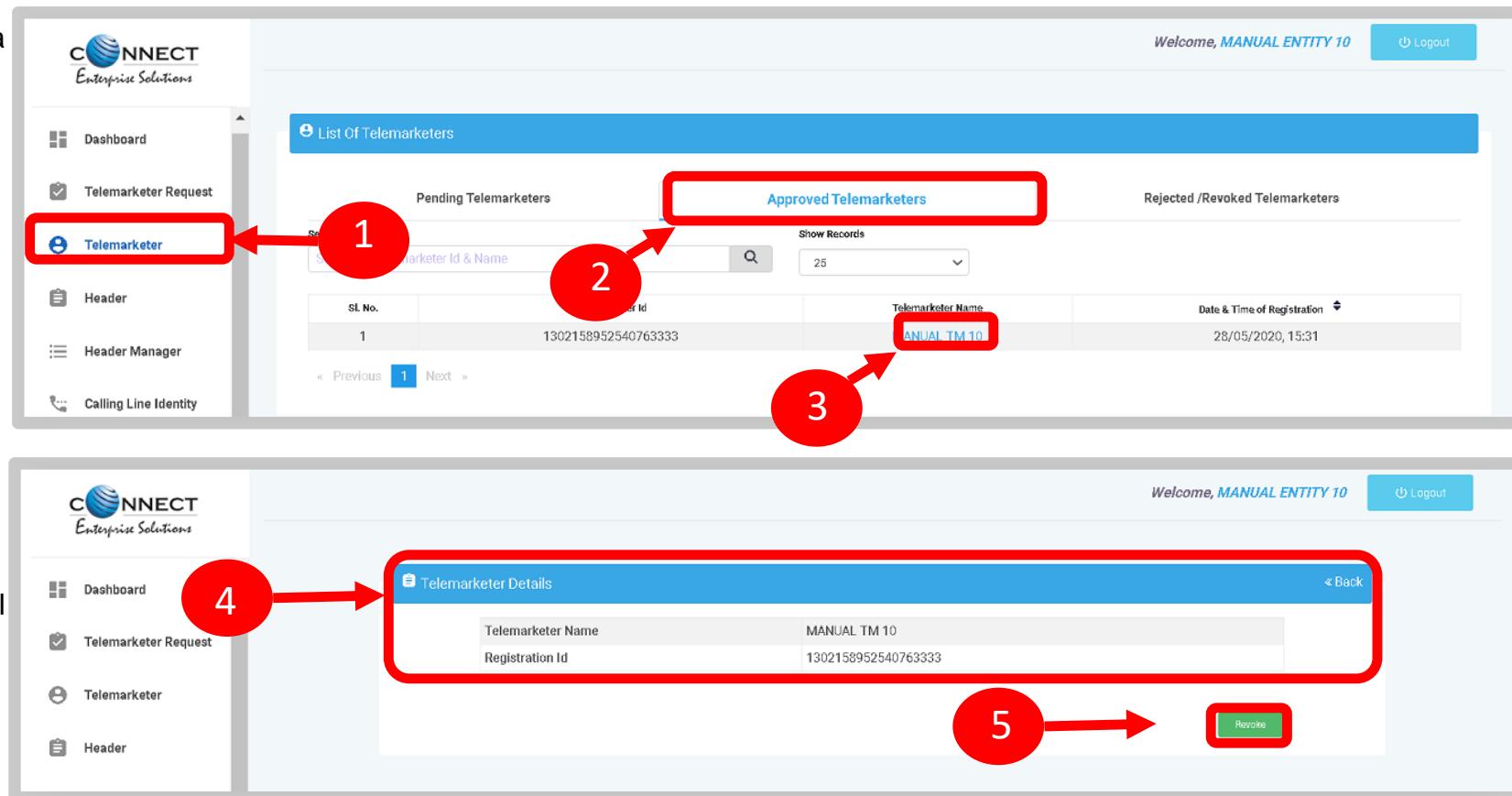
SL. No.	Telemarketer Id	Telemarketer Name	Date & Time of Registration
1	1302158952540763333	MANUAL TM 10	28/05/2020, 15:31

# 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



The screenshots show the 'List Of Telemarketers' page and its detail view.

**Screenshot 1: List Of Telemarketers**

- 1. The 'Telemarketer' tab is selected in the sidebar.
- 2. The 'Approved Telemarketers' section is highlighted.
- 3. A specific telemarketer entry is selected, showing the name 'MANUAL TM 10'.

SL No.	Registration Id	Telemarketer Name	Date & Time of Registration
1	1302158952540763333	MANUAL TM 10	28/05/2020, 15:31

**Screenshot 2: Telemarketer Details**

- 4. The 'Telemarketer Details' view is shown for the selected telemarketer.
- 5. The 'Revoke' button is highlighted.

Telemarketer Name	Registration Id
MANUAL TM 10	1302158952540763333

# ENTITY –TELEMARKETER REVOCATION CONFIRMATION

6

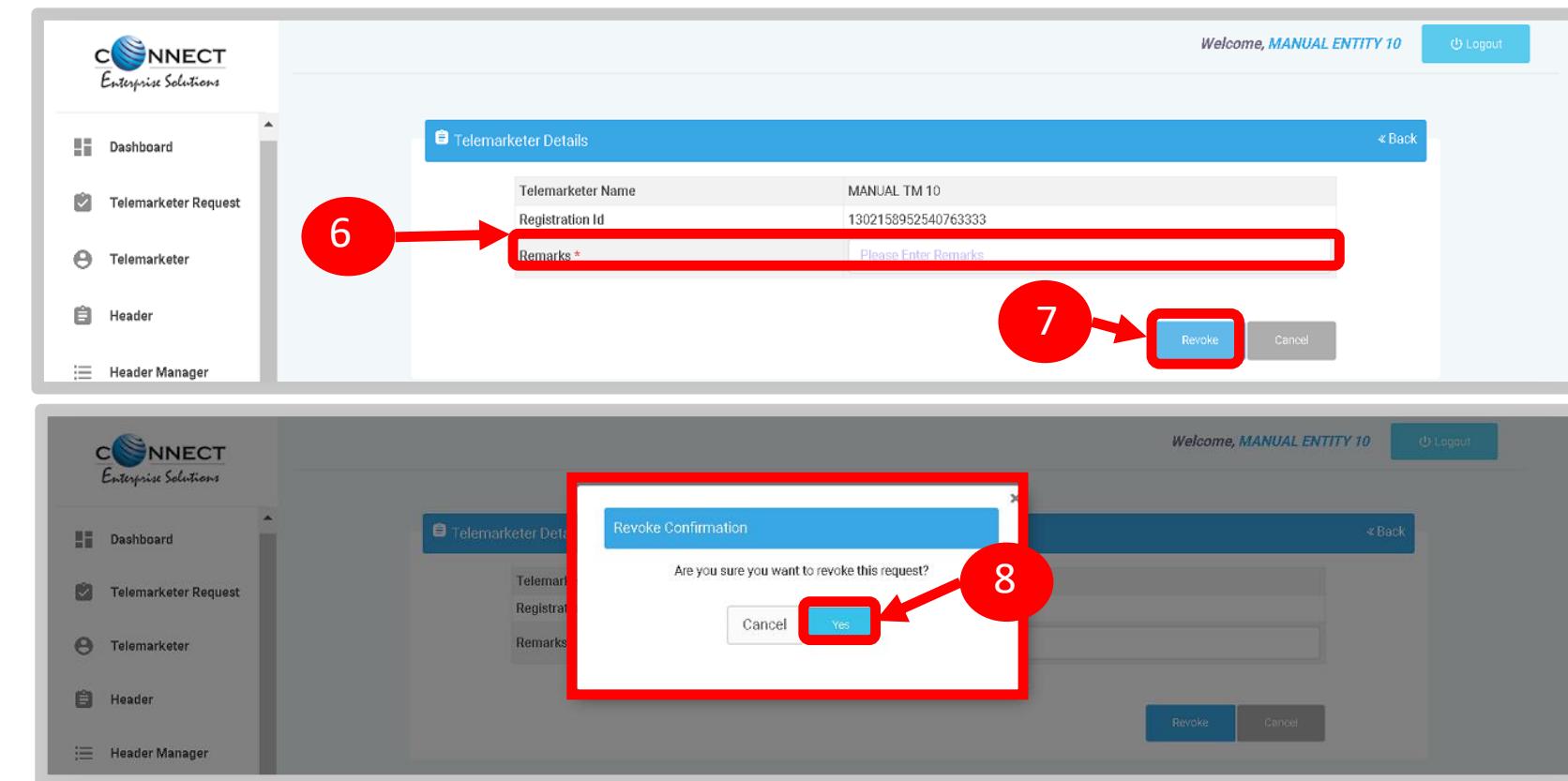
On clicking the Revoke button a page opens, provide the relevant **Remarks** for revocation.

7

Press **Revoke** button after providing remarks.

8

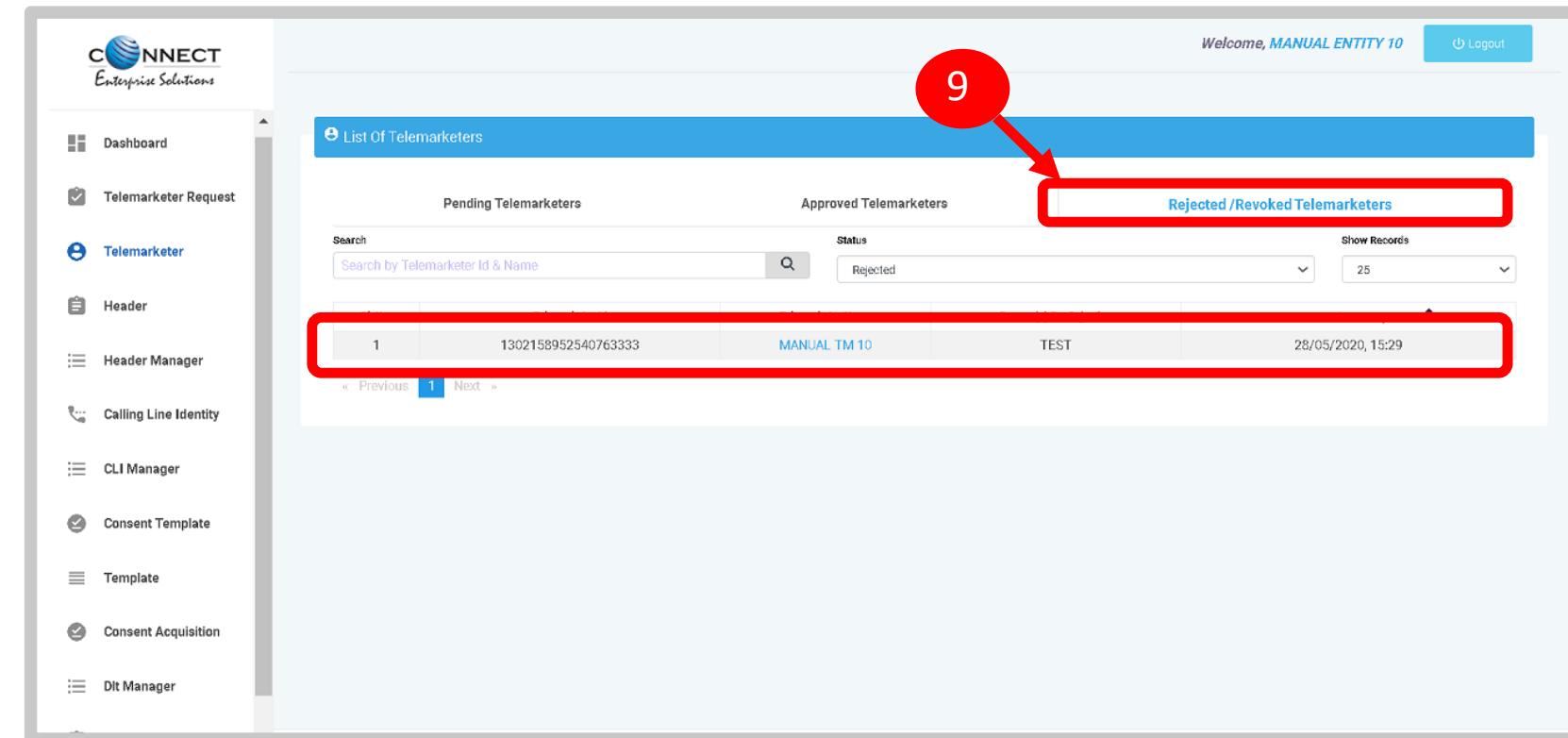
A **pop-up message** will be displayed to confirm the Revocation process. Press **Yes** to confirm the action or press cancel to stop the action.



## 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.



9

Welcome, MANUAL ENTITY 10 Logout

List Of Telemarketers

Pending Telemarketers Approved Telemarketers Rejected /Revoked Telemarketers

Search by Telemarketer Id & Name Status Show Records

Rejected 25

1	1302158952540763333	MANUAL TM 10	TEST	28/05/2020, 15:29
« 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.

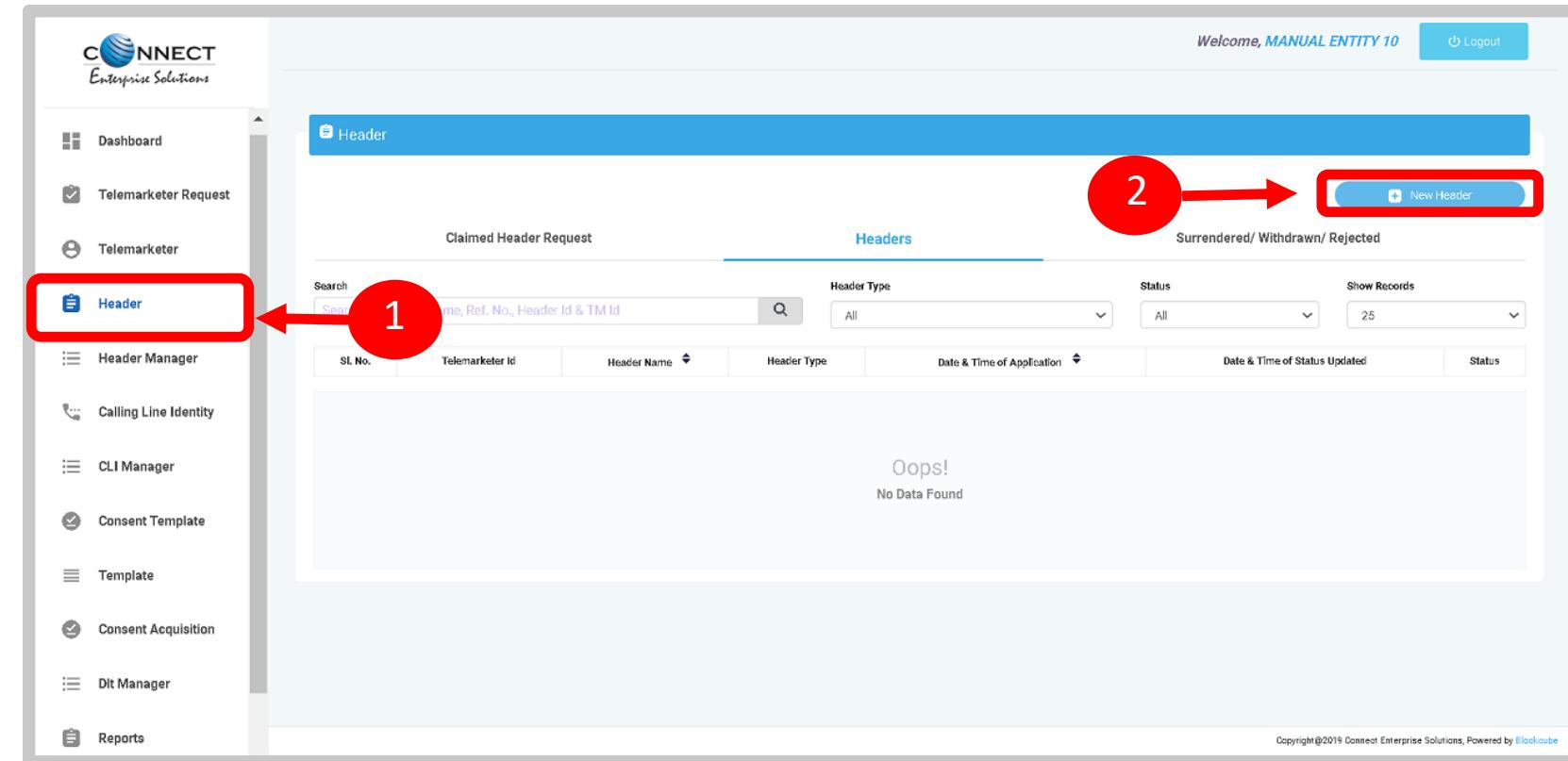
Service Implicit - Service messages that are ought to be sent basis on the business relation with the customer. Ex : Service Alert Messages

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.



1

2

Welcome, MANUAL ENTITY 10 Logout

**Header**

Claimed Header Request Headers

Surrendered/ Withdrawn/ Rejected

Search Show Records

Header Name Header Type

Date & Time of Application Date & Time of Status Updated

Status

Sl. No. Telemarketer Id Header Name Header Type Date & Time of Application Date & Time of Status Updated Status

Oops!  
No Data Found

Copyright@2019 Connect Enterprise Solutions, Powered by Blockcube

2

Click **New Header** to create New Single Header

# HEADER CREATION – SELECTION OF HEADER TYPE

3

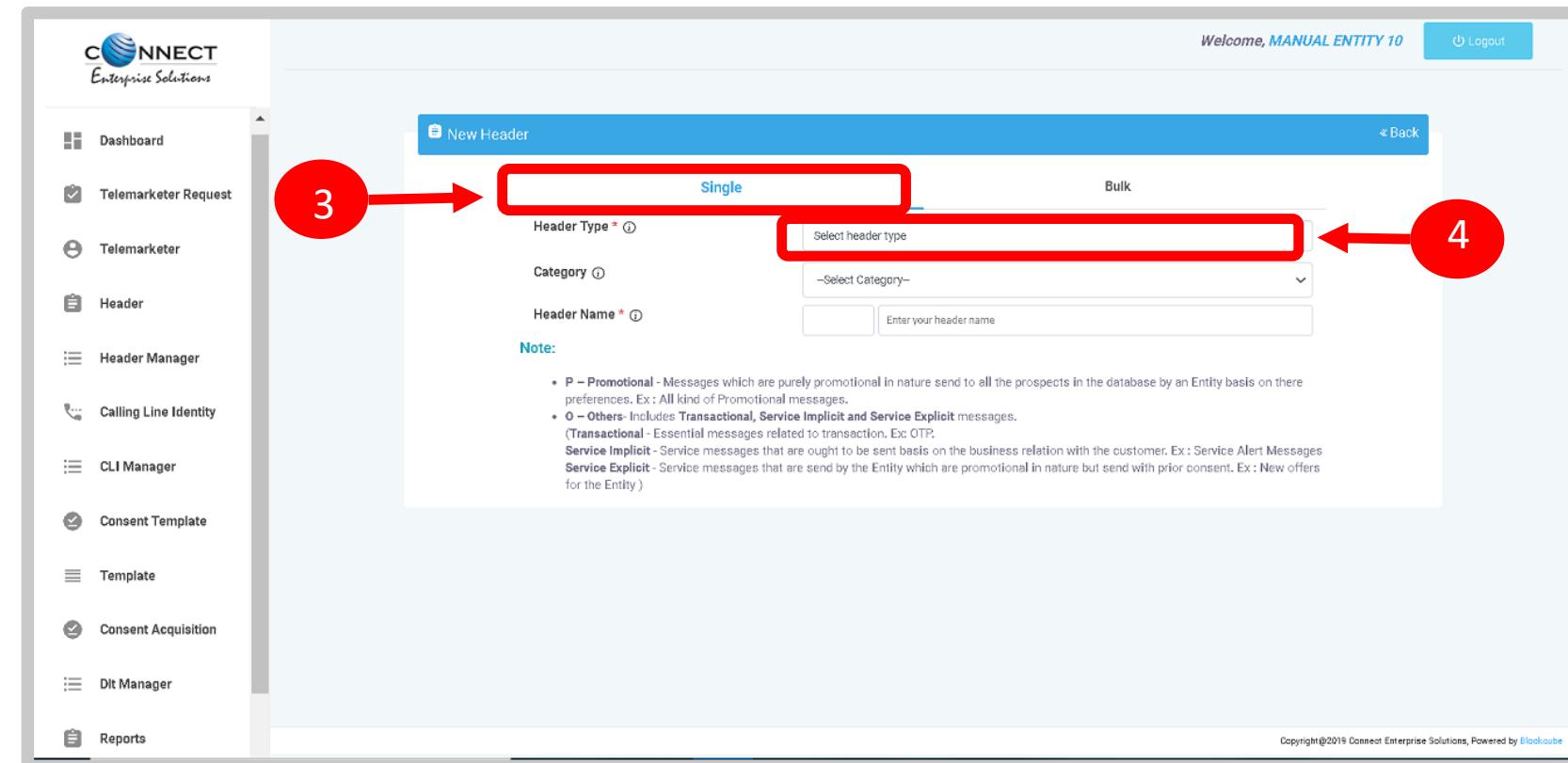
Click **Single** to create a New Single Header and select the other fields.

4

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

- Promotional
- Other

*(i) 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)*



The screenshot shows the 'New Header' creation screen. On the left, there's a sidebar with various menu items: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main area has a blue header bar with the title 'New Header'. Below it, there are several input fields and dropdown menus. One dropdown menu, labeled 'Header Type \*' with a red circle '3' over it, is set to 'Single'. Another dropdown menu, labeled 'Select header type' with a red circle '4' over it, is currently empty. There are also fields for 'Category' (with a placeholder '-Select Category-'), 'Header Name \*' (with a placeholder 'Enter your header name'), and a note section with a list of header types: Promotional, Others, Transactional, Service Implicit, and Service Explicit.

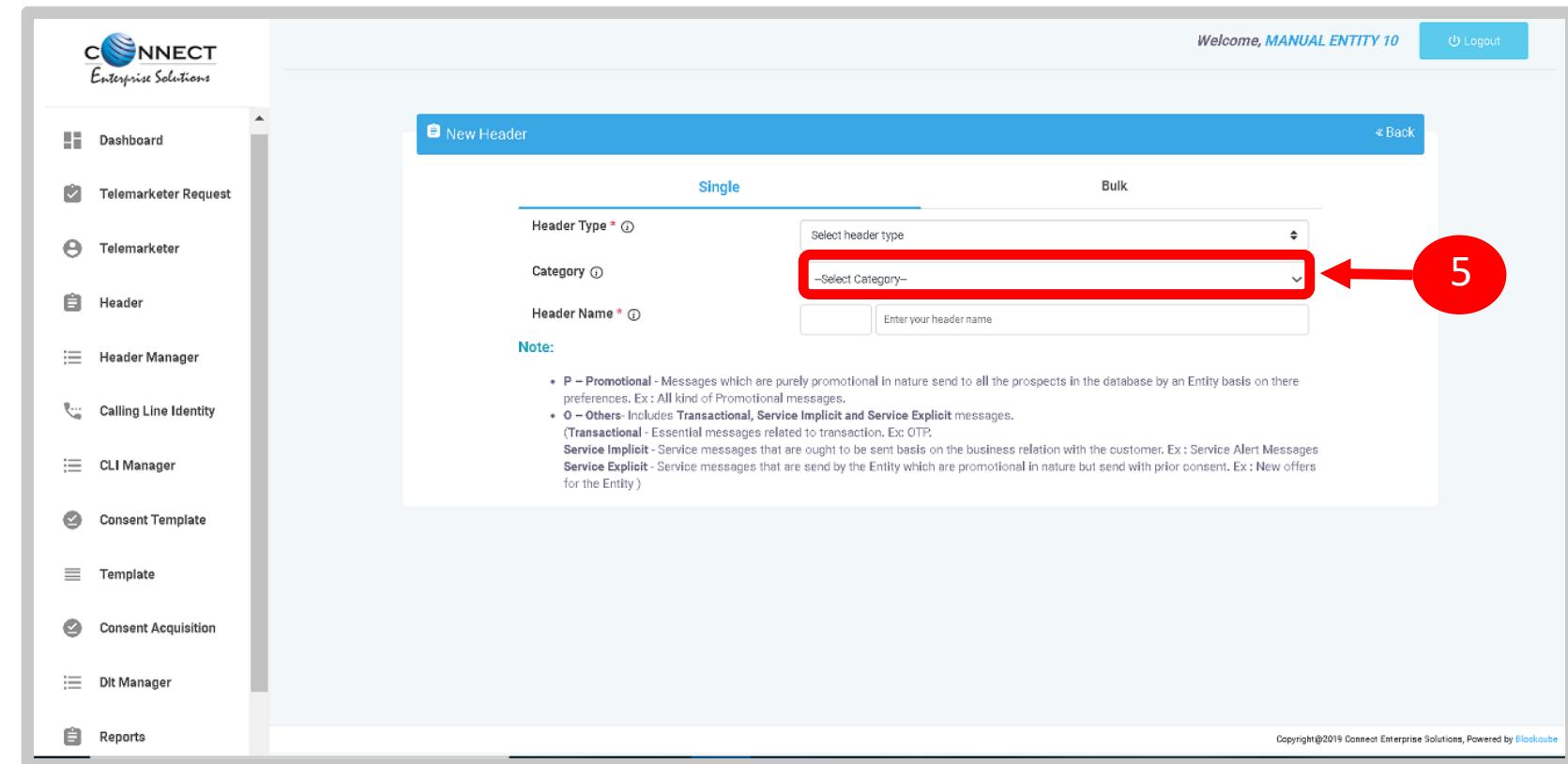
**NOTE :**In case of Government Entities, there will be Header Exemption option (If selected you will have to upload verification document)

# HEADER CREATION – SELECTION OF CATEGORY

5

Select the **Category** basis on the business for which the header needs to be created.

- (i) 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.
- (i) In case the Header Type is “Other” then category is optional but for Promotional category is mandatory.



The screenshot shows the software's navigation bar at the top with 'CONNECT Enterprise Solutions', 'Welcome, MANUAL ENTITY 10', and 'Logout'. Below the navigation is a sidebar with icons for Dashboard, Telemarketer Request, Telemarketer, Header (which is selected), Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a blue header 'New Header' with tabs for 'Single' and 'Bulk'. Under 'Single', there are fields for 'Header Type \*' (dropdown), 'Category' (dropdown, highlighted with a red box and circled '5'), 'Header Name \*' (text input), and a note section. The note section defines categories: P - Promotional (purely promotional messages), O - Others (Transactional, Service Implicit, Service Explicit), and S - Service (messages based on business relation). A copyright notice at the bottom right reads 'Copyright@2019 Connect Enterprise Solutions, Powered by Blockcube'.

## 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

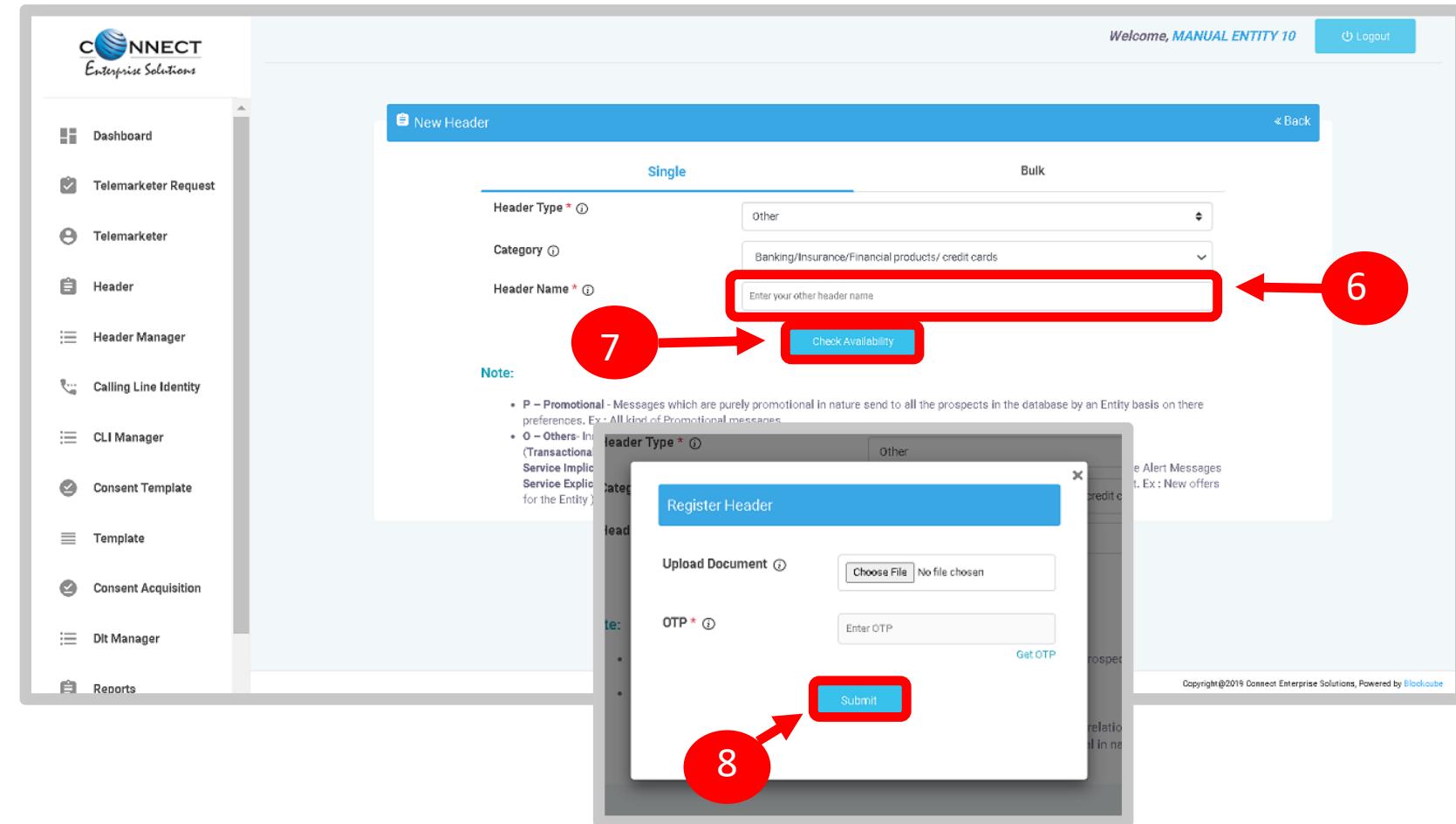
# HEADER CREATION – CREATION OF HEADER NAME

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

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

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

- 8** Upload Document and Click Get OTP and type in OTP to verify the header details and click **Submit** button.

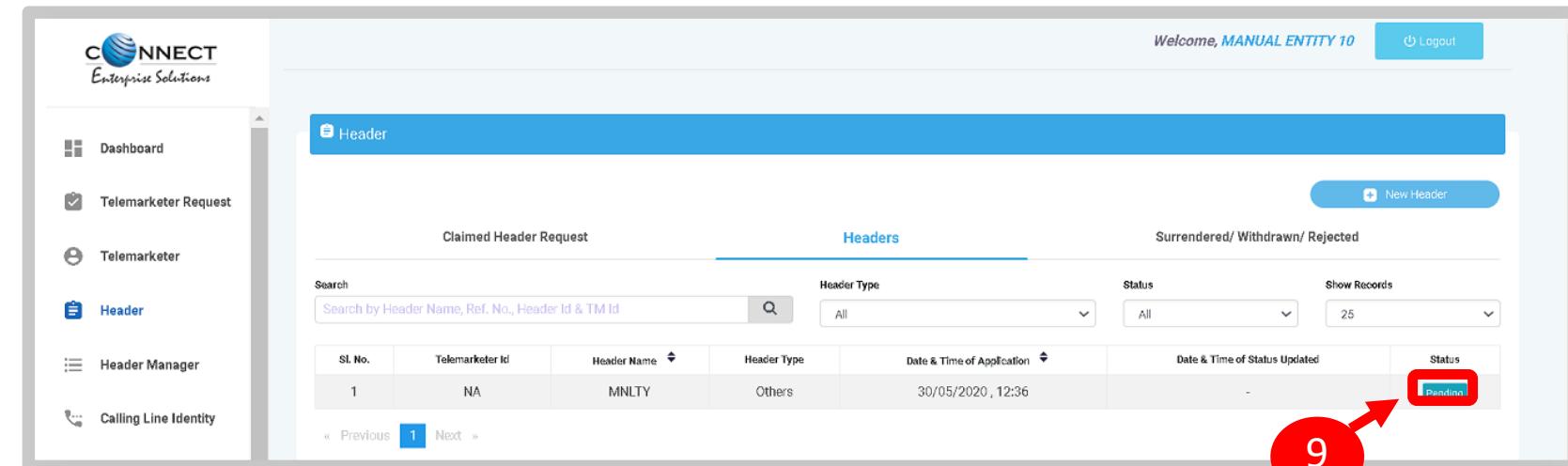


The screenshot shows the software interface for creating a new header. On the left is a sidebar menu with options: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main area has a blue header bar with 'New Header' and a 'Logout' button. Below the header are tabs for 'Single' and 'Bulk'. The 'Single' tab is active, showing fields for 'Header Type \*' (set to 'Other'), 'Category' (set to 'Banking/Insurance/Financial products/ credit cards'), and 'Header Name \*' (with a placeholder 'Enter your other header name'). A red box highlights this input field, and a red circle with the number '6' is placed to its right. Below these fields is a note section with two bullet points about header types. A red circle with the number '7' is placed near the 'Check Availability' button, which is highlighted with a red box. At the bottom of the screen, a modal window titled 'Register Header' is open, containing fields for 'Upload Document' (with a 'Choose File' button), 'OTP \*' (with a 'Get OTP' button), and a 'Submit' button. A red circle with the number '8' is placed near the 'Submit' button.

# HEADER CREATION – HEADER STATUS

9

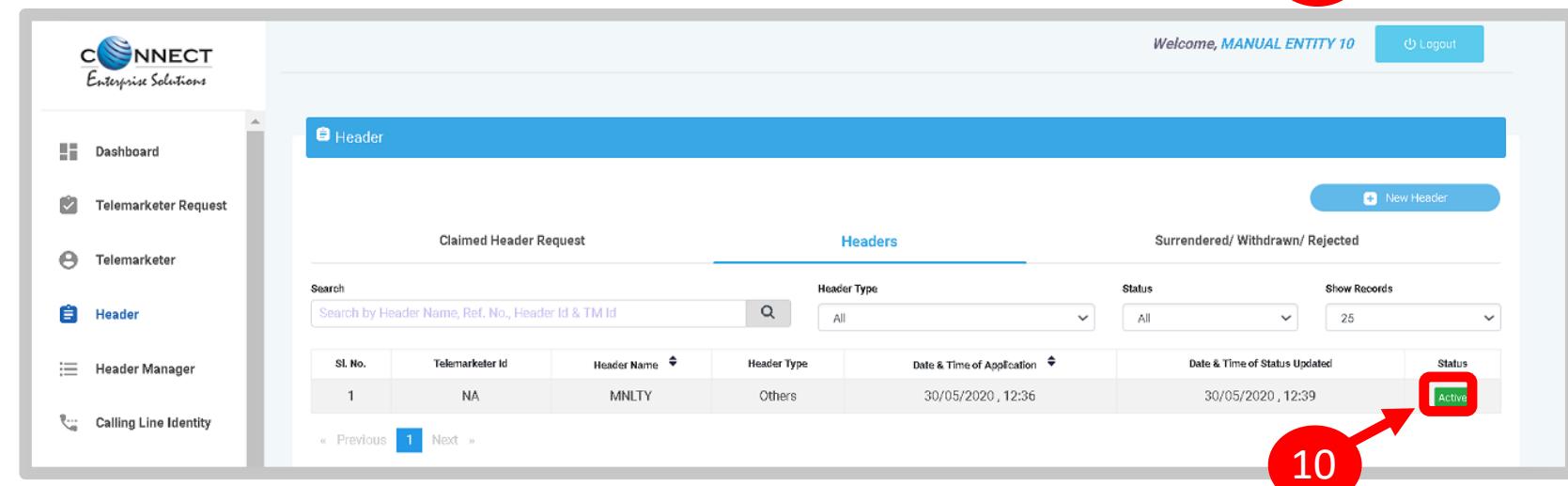
Once you submit the header request it would show in the header section with status as **Pending**.



The screenshot shows the CONNECT Enterprise Solutions software interface. On the left is a sidebar with navigation links: Dashboard, Telemarketer Request, Telemarketer, Header (which is selected and highlighted in blue), Header Manager, and Calling Line Identity. The main content area has a blue header bar with the title 'Header'. Below the header are three tabs: 'Claimed Header Request', 'Headers' (which is selected and highlighted in blue), and 'Surrendered/ Withdrawn/ Rejected'. Underneath these tabs is a search bar labeled 'Search' with the placeholder 'Search by Header Name, Ref. No., Header Id & TM Id'. To the right of the search bar are dropdown menus for 'Header Type' (set to 'All'), 'Status' (set to 'All'), and 'Show Records' (set to '25'). A table below these filters displays one record. The columns in the table are: Sl. No., Telemarketer Id, Header Name, Header Type, Date & Time of Application, Date & Time of Status Updated, and Status. The first row shows: 1, NA, MNLTY, Others, 30/05/2020, 12:36, and a red box highlights the word 'Pending' under the Status column. A red arrow points from a red circle containing the number '9' to the 'Pending' status.

10

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



This screenshot is identical to the previous one, showing the same interface and data. The only difference is the status of the header. In the table, the 'Status' column for the single record now shows the word 'Active' instead of 'Pending'. A red arrow points from a red circle containing the number '10' to the 'Active' status.

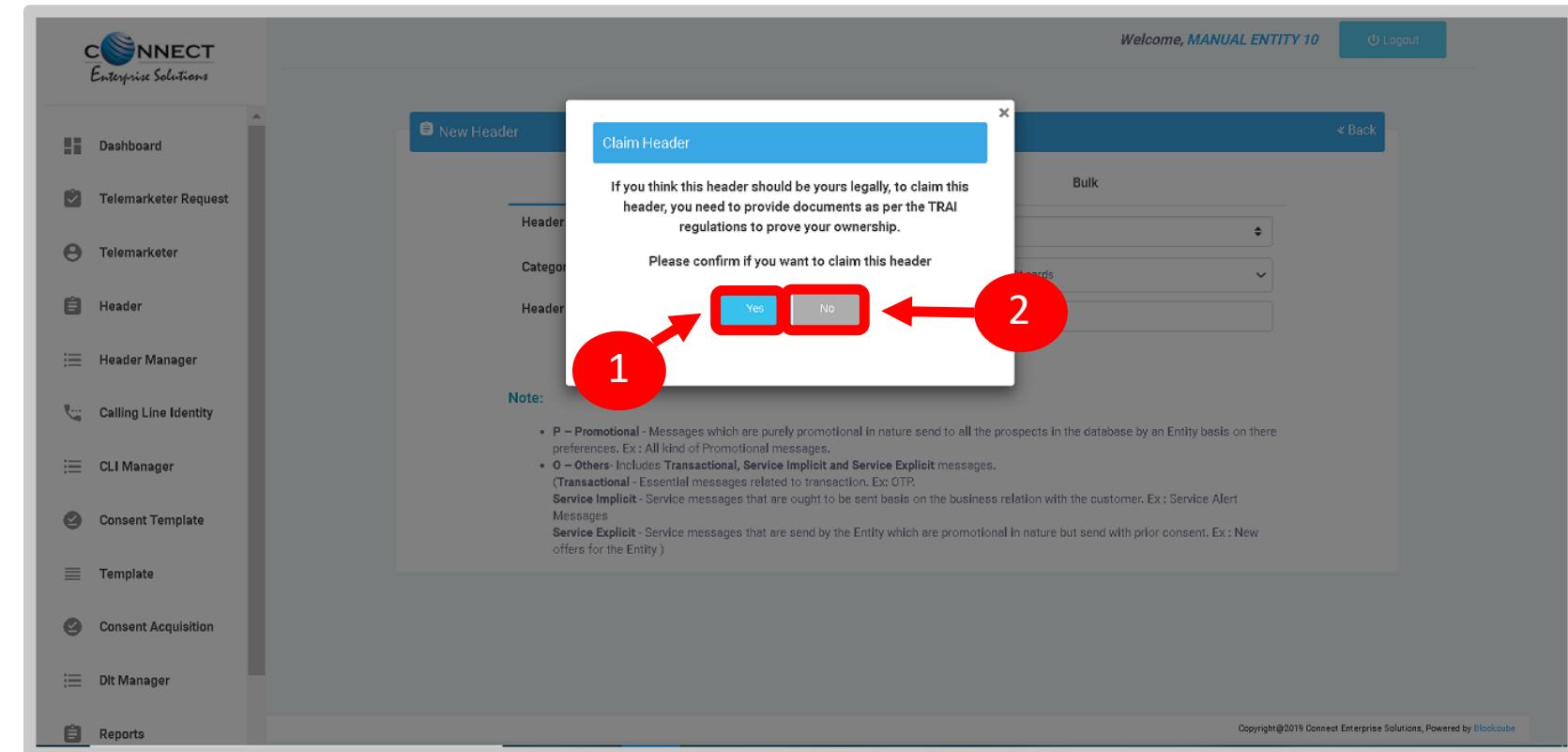
# CLAIM HEADER

# CLAIM HEADER – CLAIM INITIATION

If the requested Header is already allotted to other entity on DLT, then follow the below steps:

1 Click **Yes** to claim the header and fill the form.

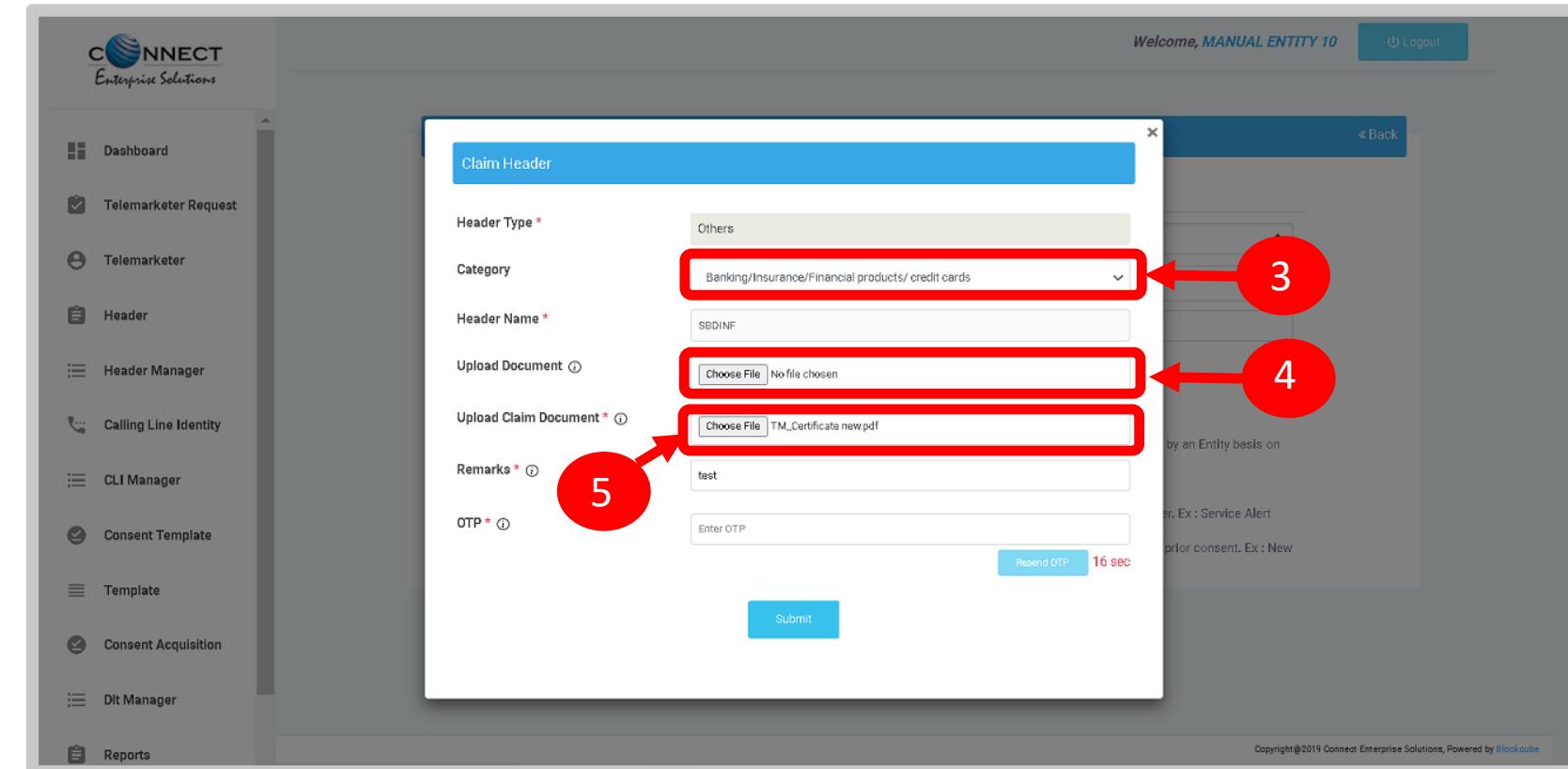
2 Click **No**, if you do not want to claim the header



# CLAIM HEADER – CATEGORY SELECTION / DOCUMENT UPLOAD

If you choose to claim the header already registered on DLT. A pop-up will be displayed as shown in the figure. The details of the header to be claimed will be auto fetched Viz. **Header Type & Header Name**.

- 3 Select the **category** if you want to change the same. This is only possible in case of “Other” Header Type.
- 4 **Upload** the relevant document related to Header
- 5 **Upload** the relevant document proving your ownership of the Header.



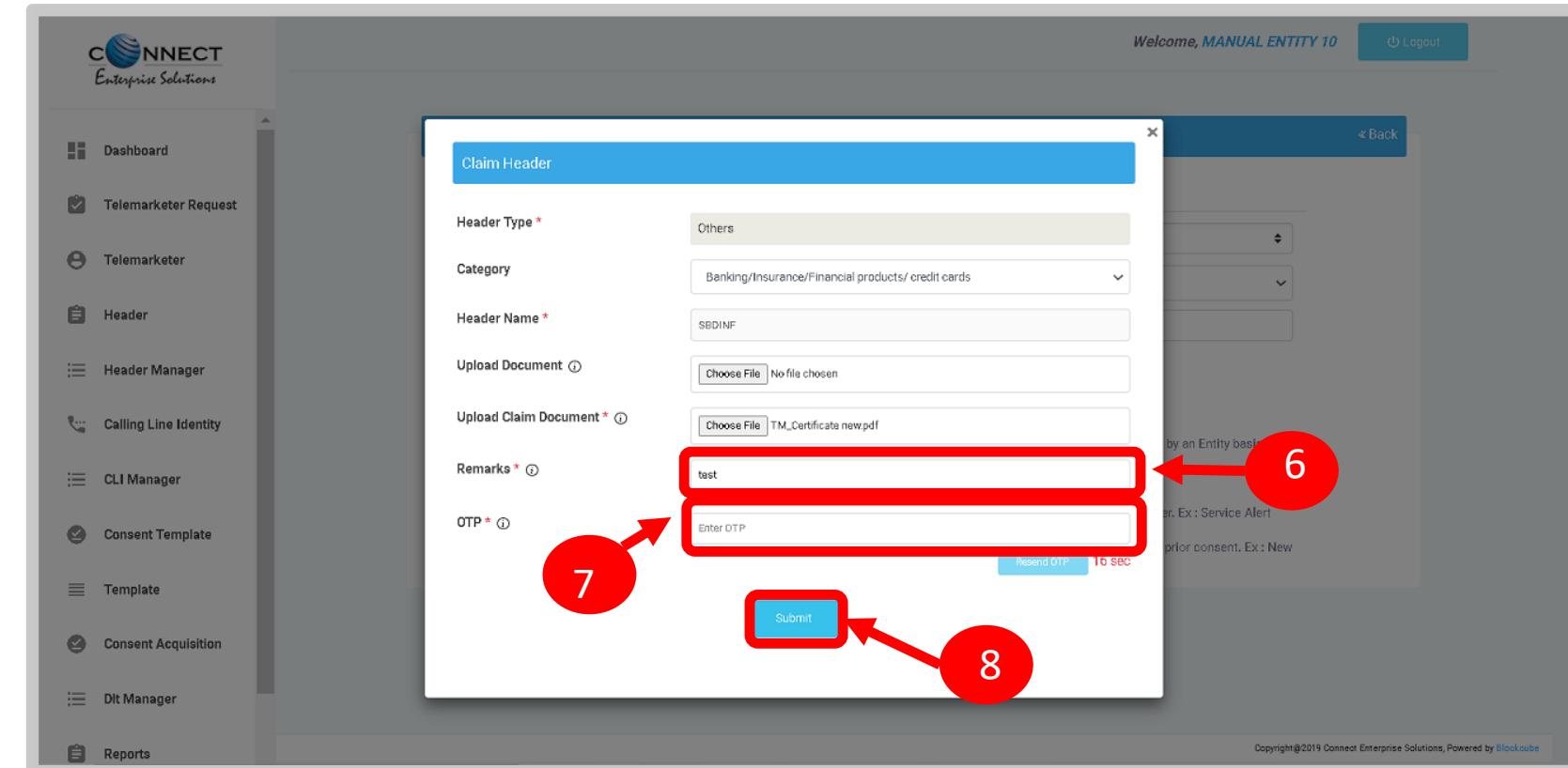
**NOTE :** In case of Government Entities, there will be Header Exemption option (If selected you will have to upload verification document)

# CLAIM HEADER – REMARKS/OTP/ SUBMISSION OF CLAIM

6 Put in the **Remarks/reason** to claim the Header.

7 Click **Get OTP** and type in OTP to verify the header details and click. You will receive the password on the authorized person's registered mobile number.

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



The screenshot shows the software interface with a sidebar menu on the left and a main 'Claim Header' form dialog box in the center.

- Header Type:** Others
- Category:** Banking/Insurance/Financial products/ credit cards
- Header Name:** SBDINF
- Upload Document:** No file chosen
- Upload Claim Document:** TM\_Certificate new.pdf
- Remarks:** test (highlighted with a red box and circled with a red arrow labeled 6)
- OTP:** Enter OTP (highlighted with a red box and circled with a red arrow labeled 7)
- Submit:** A blue button at the bottom right of the form (highlighted with a red box and circled with a red arrow labeled 8).

Red numbers 6, 7, and 8 are placed on the screen to indicate the steps corresponding to the numbered steps in the instructions above.

# CLAIM HEADER – REQUEST STATUS

9

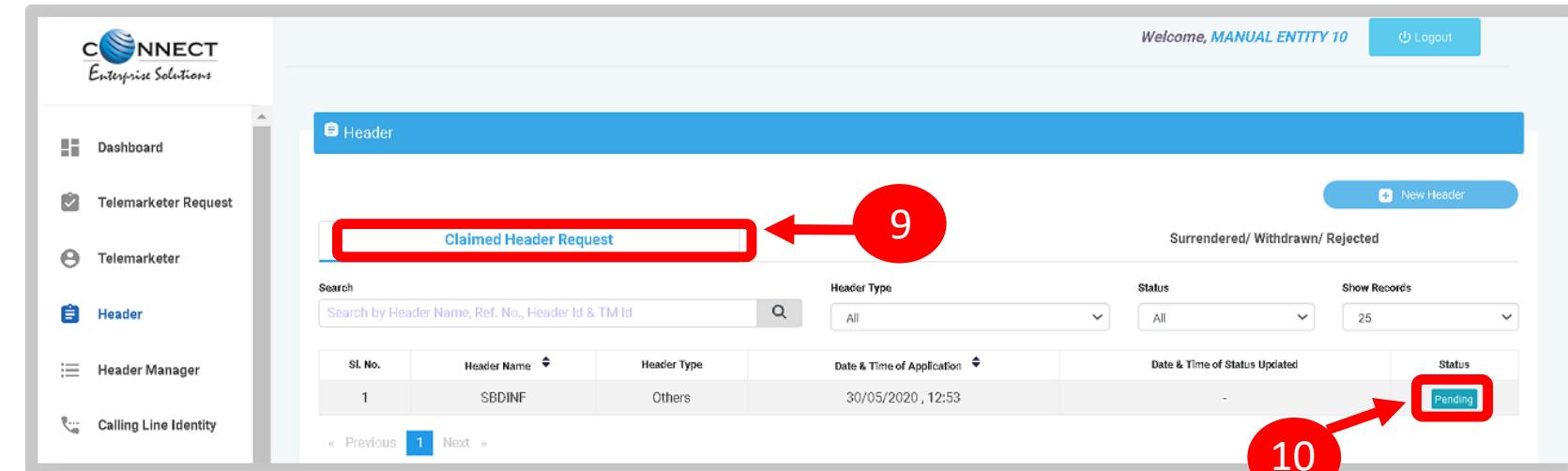
All the Claimed Headers will be visible in the “Claimed Header Request”.

10

Claimed Header request will be in **Pending** status subject to approval from the Operator.

11

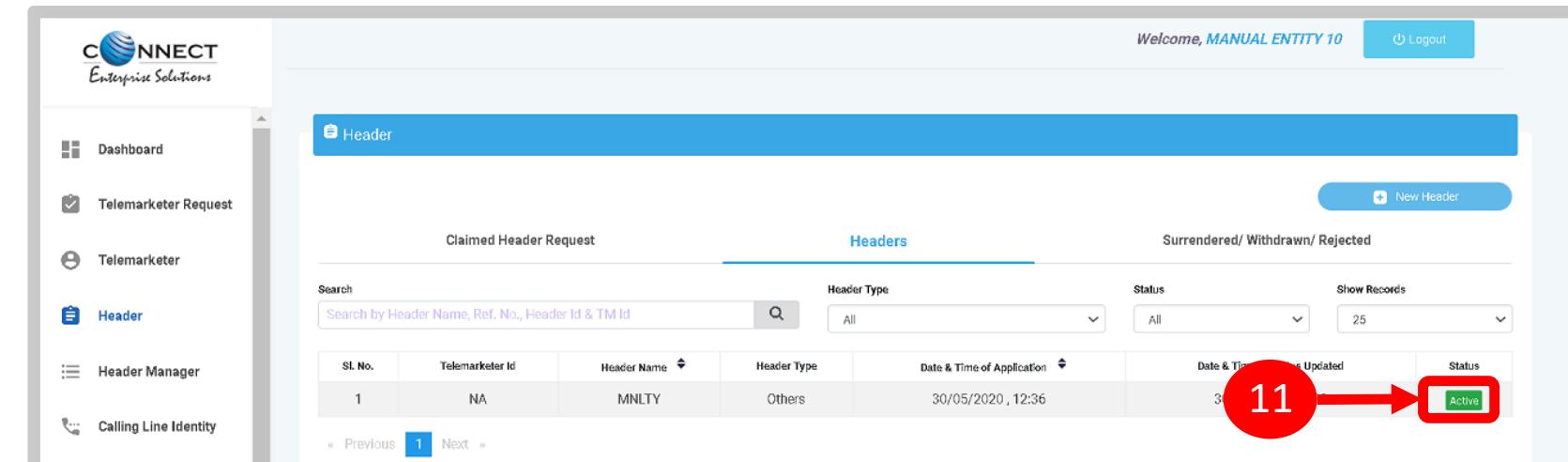
Once the Operator approves and the claim process gets complete, the status of the claimed headers will turn to **Active**.



**Header**

**Claimed Header Request**

SL. No.	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	SBDINF	Others	30/05/2020, 12:53	-	Pending



**Header**

**Claimed Header Request**

**Headers**

SL. No.	Telemarketer Id	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	NA	MNLTY	Others	30/05/2020, 12:36	30/05/2020, 12:36	Active

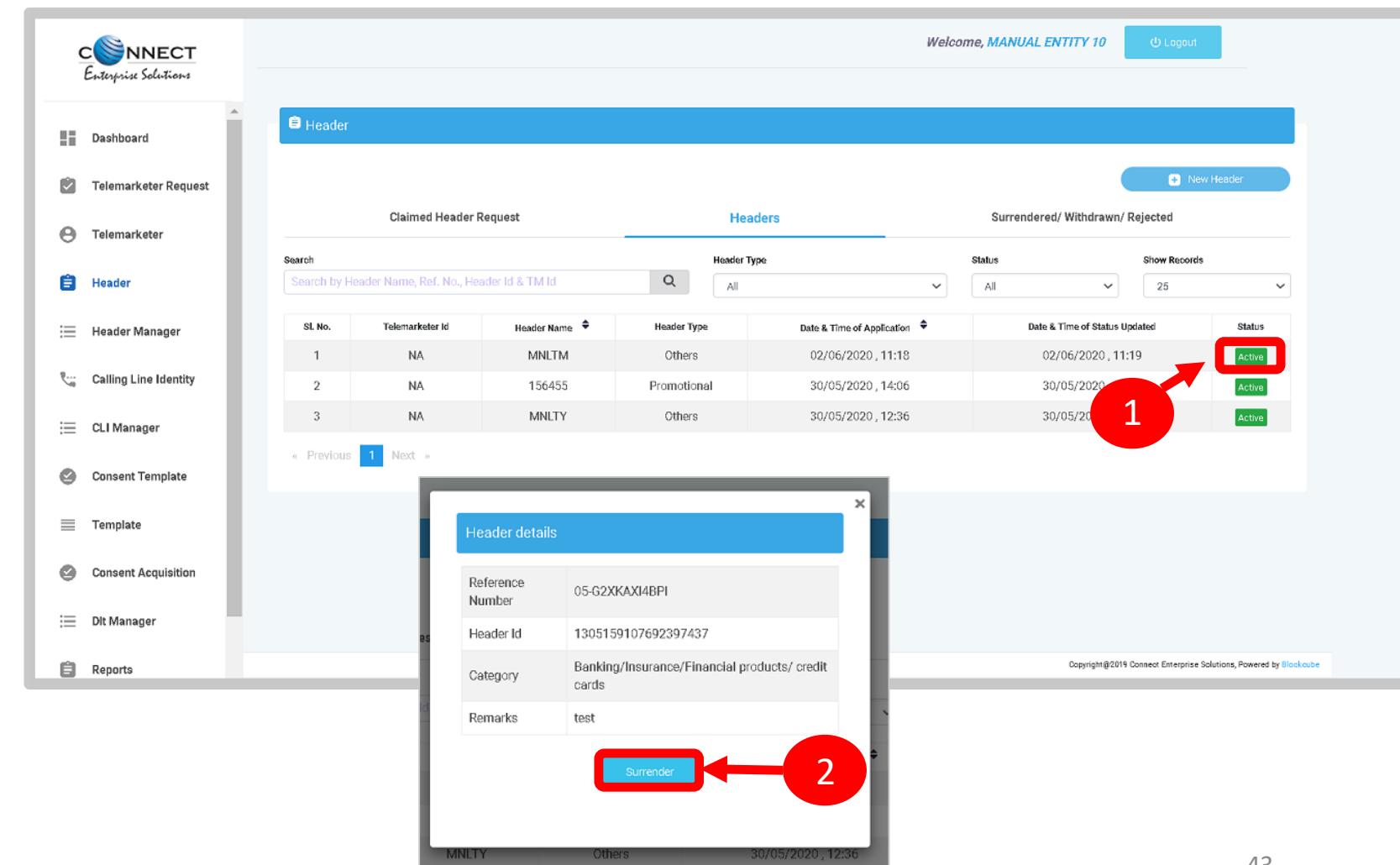
# HEADER – SURRENDER

# HEADER SURRENDER – INITIATION

If the Entity does not want to send commercial communication with a particular header. Then they can surrender the same, to surrender 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.



SL. No.	Telemarketer Id	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	NA	MNLTM	Others	02/06/2020, 11:18	02/06/2020, 11:19	Active
2	NA	156455	Promotional	30/05/2020, 14:06	30/05/2020, 14:06	Active
3	NA	MNLTY	Others	30/05/2020, 12:36	30/05/2020, 12:36	Active

**Header details**

Reference Number	05-G2XKAXI4BPI
Header Id	1305159107692397437
Category	Banking/Insurance/Financial products/ credit cards
Remarks	test

**Surrender**

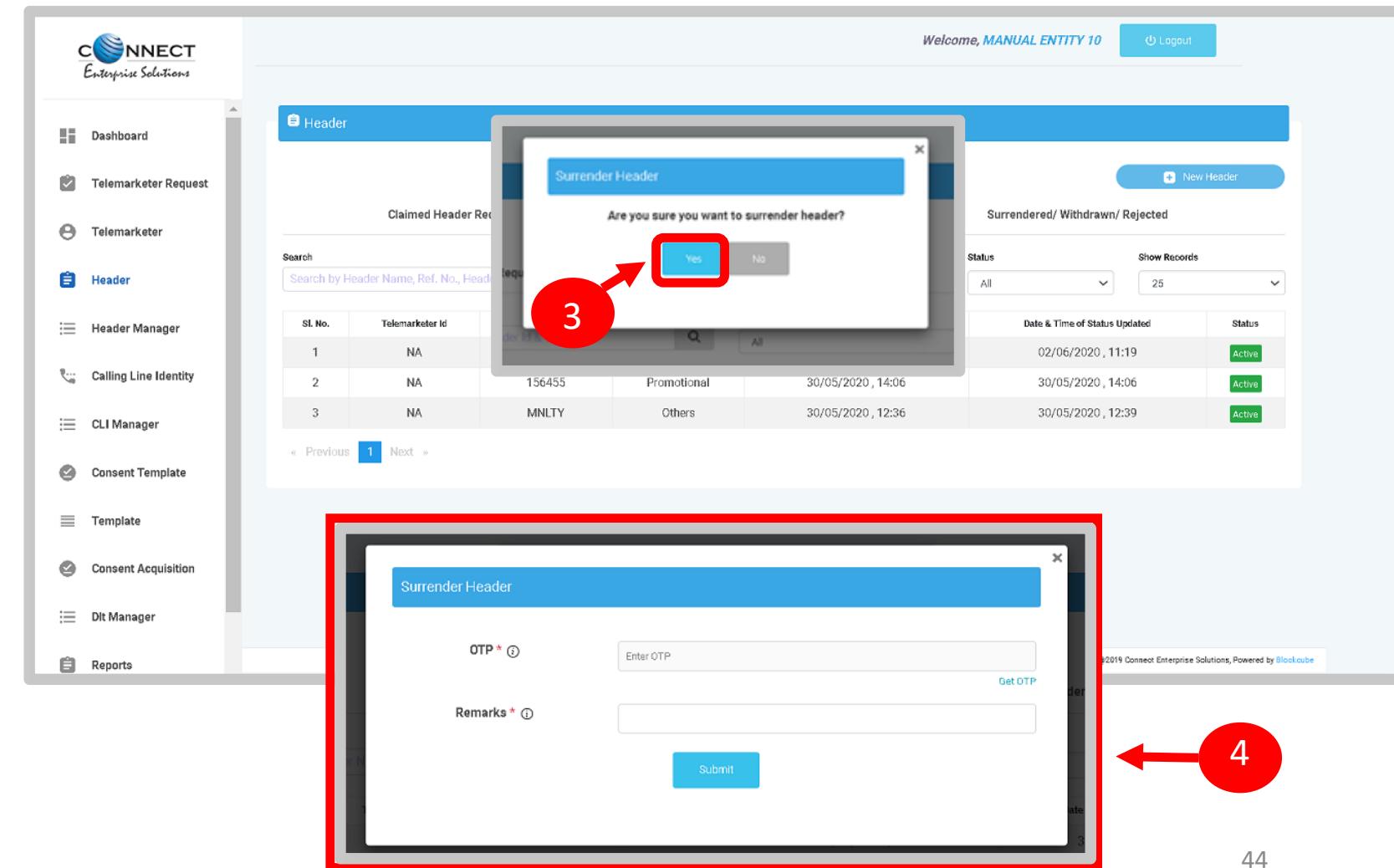
# HEADER SURRENDER – OTP / CONFIRMATION

3

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

4

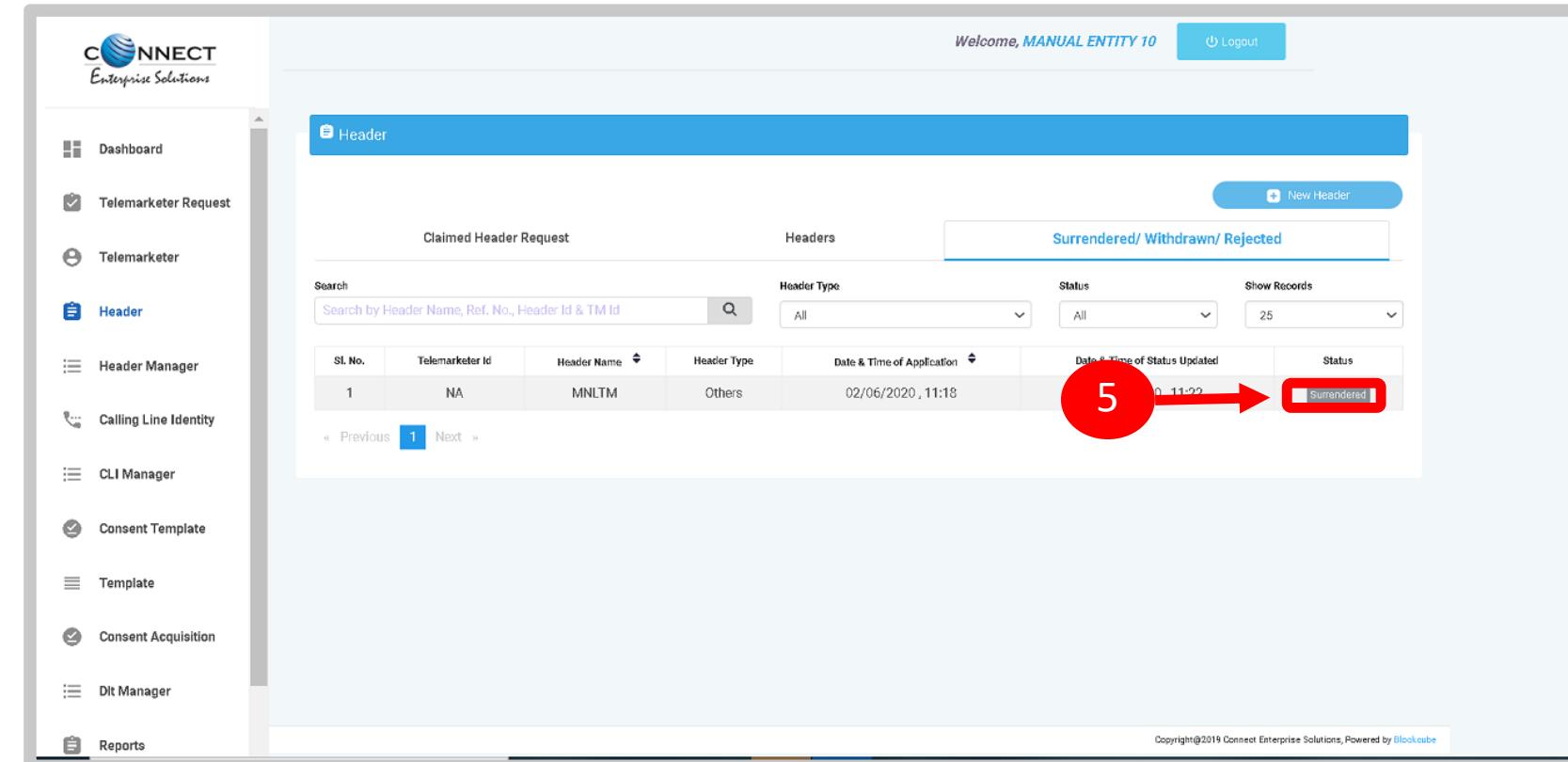
Once you confirm the surrender of the header then a pop-up will appear for authentication. Share the **OTP** that you receive on your registered mobile number. Also provide the reason for Surrender in the Remarks section.



## HEADER SURRENDER - STATUS

5

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



The screenshot shows the 'Header' module interface. The left sidebar includes links for Dashboard, Telemarketer Request, Telemarketer, Header (selected), Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dit Manager, and Reports. The main content area has a blue header bar with 'Header' and a 'New Header' button. Below it, there are tabs for 'Claimed Header Request', 'Headers', and 'Surrendered/ Withdrawn/ Rejected' (which is selected). The 'Surrendered/ Withdrawn/ Rejected' tab is highlighted with a red circle containing the number 5. The table below has columns for Sl. No., Telemarketer Id, Header Name, Header Type, Date & Time of Application, Date & Time of Status Updated, and Status. One row is visible, showing: Sl. No. 1, Telemarketer Id NA, Header Name MNLTMM, Header Type Others, Date & Time of Application 02/06/2020, 11:18, Date & Time of Status Updated 02/06/2020, 11:22, and Status Surrendered. A red arrow points from the circled '5' to the 'Status' column of the table row.

Sl. No.	Telemarketer Id	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	NA	MNLTMM	Others	02/06/2020, 11:18	02/06/2020, 11:22	Surrendered

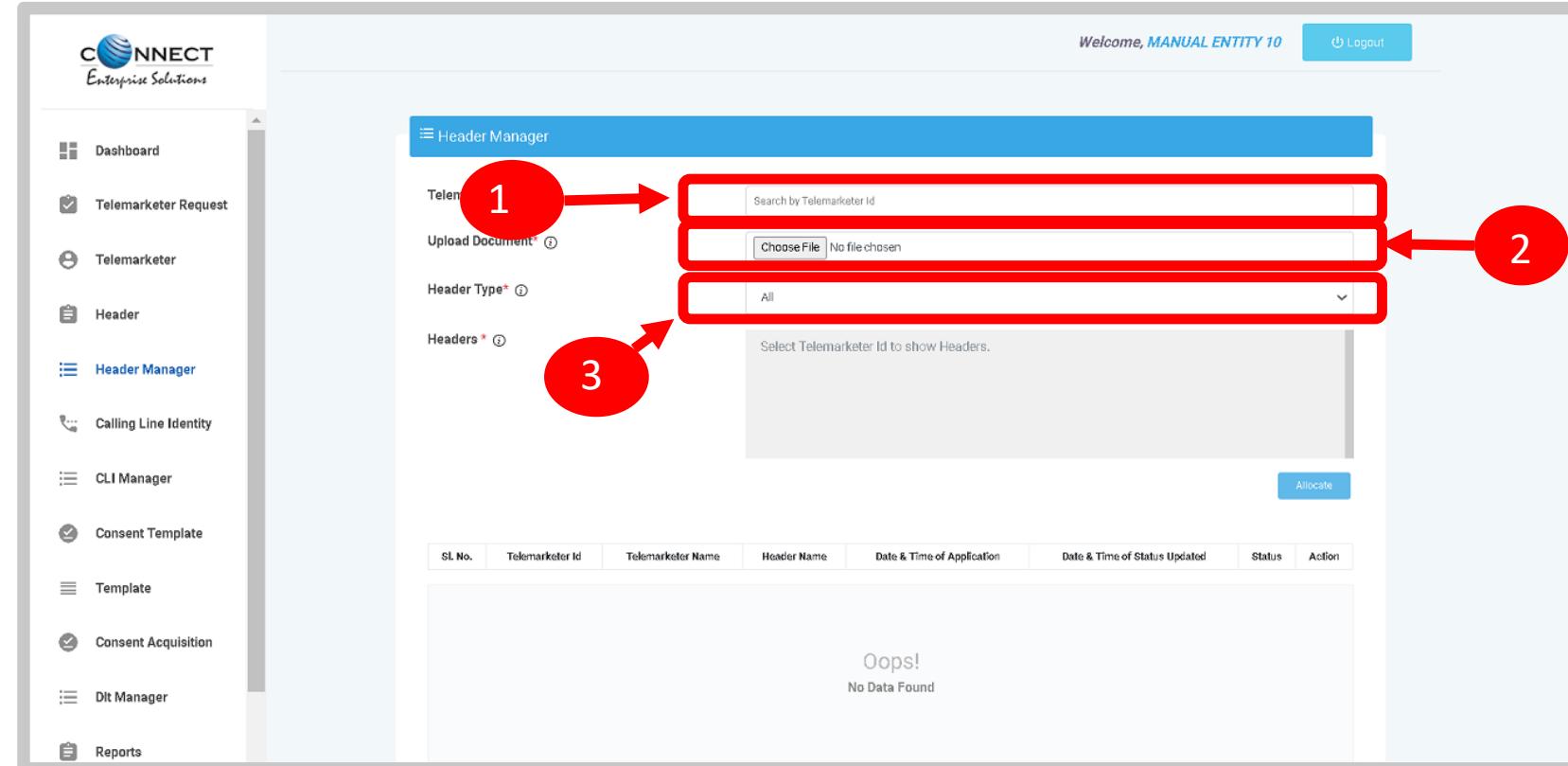
# HEADER MANAGER

*(Header Manager Function is for allocation of Registered Headers to the Telemarketer associated)*

# HEADER MANAGER – SELECTION OF TELEMARKETER

Header Manager section is available for allocating registered Headers of an Entity to its Telemarketers who are associated with the Entity through DLT.

- 1 Type or select the **Telemarketer ID** to whom you wish to allocate the registered Header
- 2 Upload the relevant documents authorizing the Telemarketer to use the allocating header(s) for commercial communication.
- 3 Select the **Header type** if necessary to filter the header list



The screenshot shows the Header Manager page. On the left is a sidebar with navigation links: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager (which is selected and highlighted in blue), Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a blue header bar with the text "Header Manager" and the user's name "Welcome, MANUAL ENTITY 10". Below the header are three input fields: "Search by Telemarketer Id" (with placeholder "Enter Telemarketer Id"), "Upload Document" (with placeholder "Choose File No file chosen"), and "Header Type" (a dropdown menu currently set to "All"). A large red box highlights these three fields, with red circles numbered 1, 2, and 3 pointing to them. Below these fields is a message: "Select Telemarketer Id to show Headers." At the bottom right of the main area is a blue "Allocate" button. At the very bottom, there is a table header with columns: SL No., Telemarketer Id, Telemarketer Name, Header Name, Date & Time of Application, Date & Time of Status Updated, Status, and Action. Below the table header, a message says "Oops! No Data Found".

# HEADER MANAGER – ALLOCATION OF HEADER(S)

4

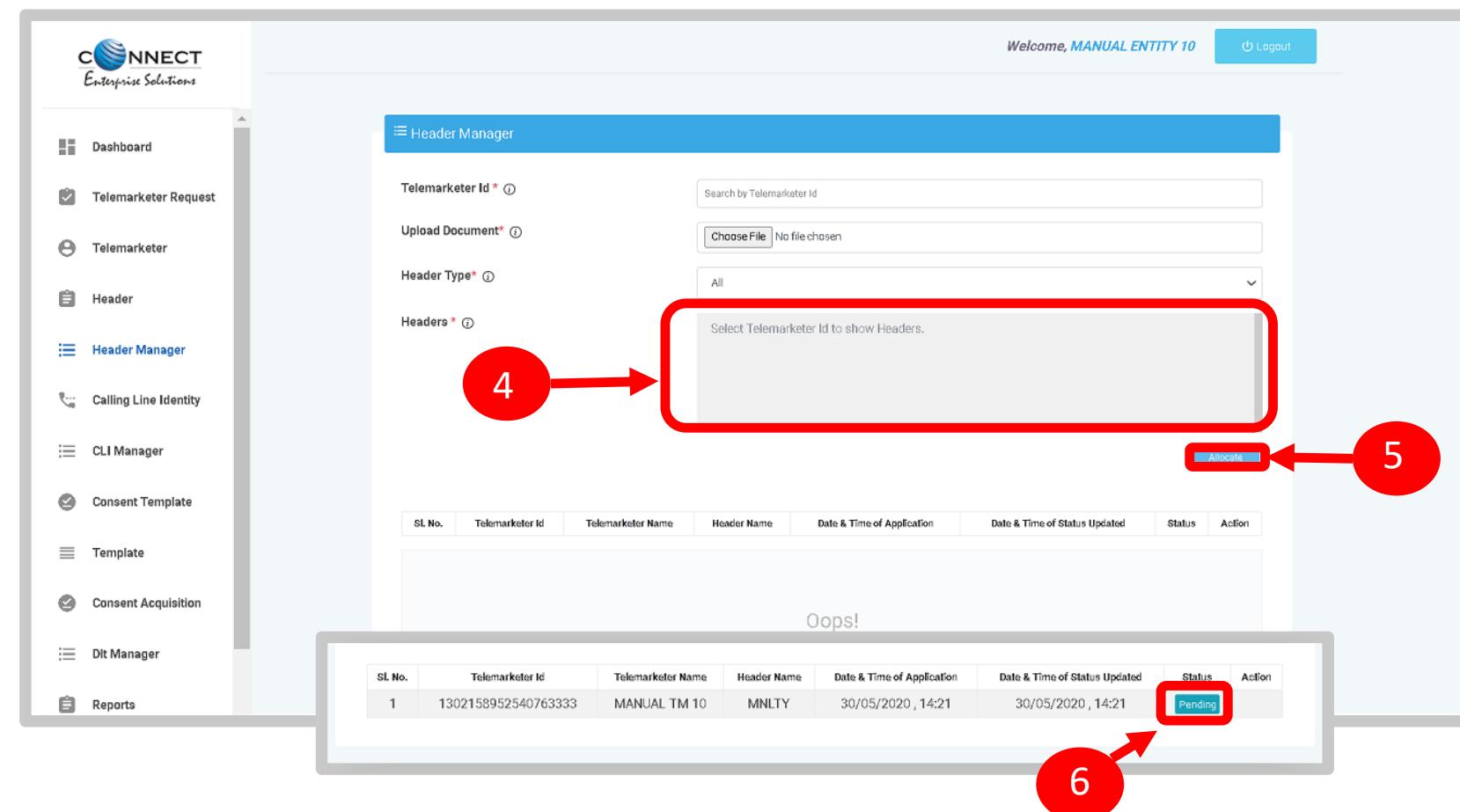
In the **Headers Box** the registered headers will appear basis on the Header type selection, if no selection done then all headers will be displayed. Select the check box available against the header(s) to be allocated.

5

Press **Allocate** button.

6

The entry will appear at the bottom with **Pending** status and once the Telemarketer accepts the allocated headers, the status of allocation will appear as Active.



The screenshot shows the Header Manager page. On the left is a sidebar with navigation links: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager (which is selected and highlighted in blue), Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a blue header bar with 'Header Manager' and a sub-header 'Telemarketer Id \*'. Below this are fields for 'Upload Document\*' (with a 'Choose File' button and a message 'No file chosen') and 'Header Type\*' (with a dropdown menu set to 'All'). A large red box labeled '4' highlights a dropdown menu titled 'Headers \*' with the instruction 'Select Telemarketer Id to show Headers.' To the right of this dropdown is a red-bordered button labeled 'Allocate'. Below the dropdown is a table with one row. At the bottom of the page is a modal window titled 'Oops!' containing another table with one row. Red boxes and arrows indicate the following steps:

- Step 4:** Points to the 'Headers \*' dropdown menu.
- Step 5:** Points to the 'Allocate' button.
- Step 6:** Points to the 'Pending' status in the 'Status' column of the table in the 'Oops!' modal.

SL. No.	Telemarketer Id	Telemarketer Name	Header Name	Date & Time of Application	Date & Time of Status Updated	Status	Action
1	1302158952540763333	MANUAL TM 10	MNLTY	30/05/2020, 14:21	30/05/2020, 14:21	Pending	

# HEADER MANAGER – REVOCATION OF ALLOCATED HEADERS

The allocated headers to a Telemarketer can be taken back by the Entity at given point of time and for that there is a Revoke function available against each Header allocated and are with active status.

7

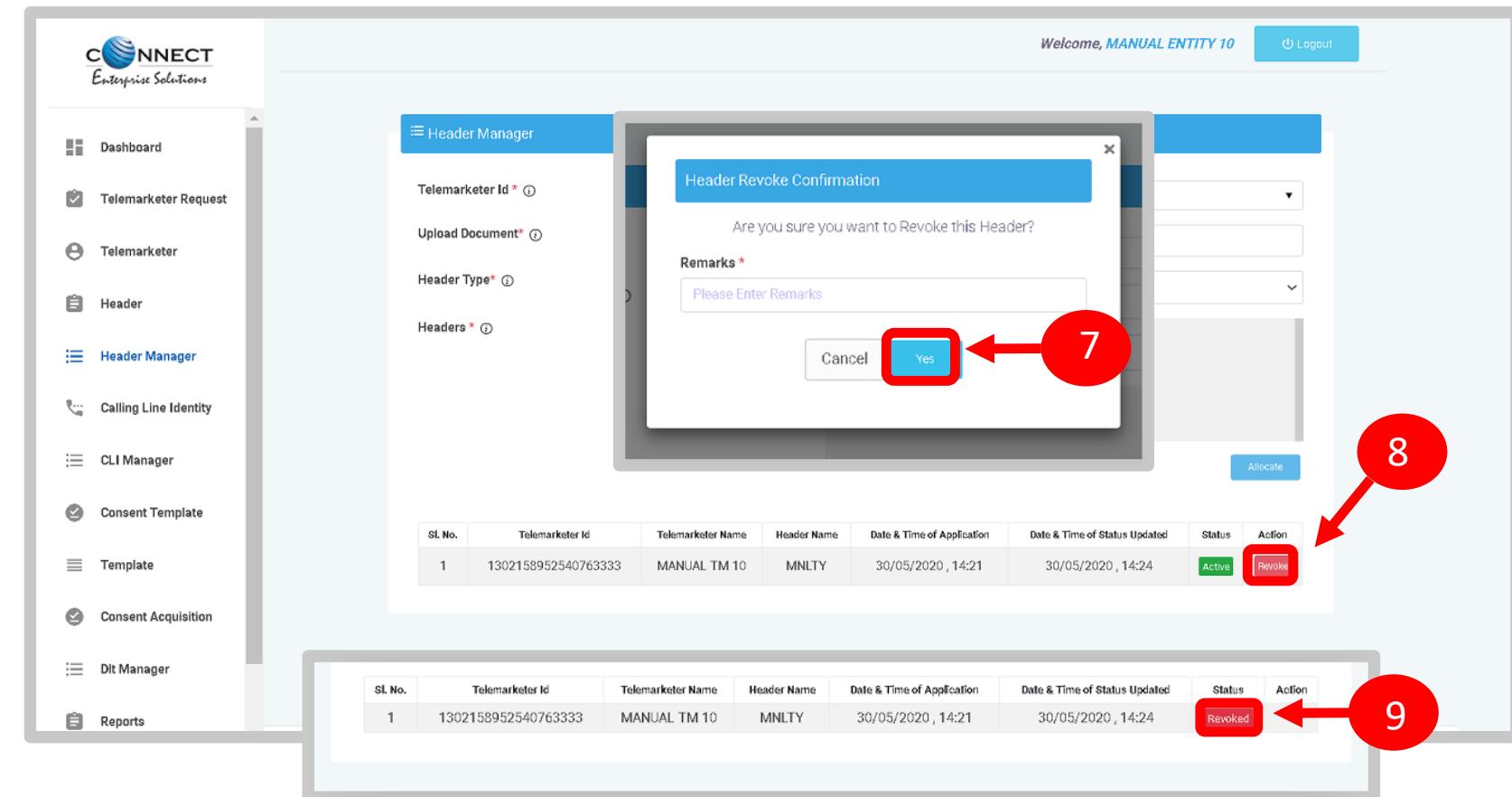
To revoke the allotment press the **Revoke** button

8

A pop-up will appear to confirm the Header allotment revocation. Press **YES** to confirm.

9

Once revoked the status will appear as **Revoked** and the Telemarketer cannot use that header for future commercial communication.



The screenshot shows the software interface for managing headers. On the left is a sidebar with navigation links: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager (which is selected and highlighted in blue), Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a header "Header Manager". It displays a table with one row of data:

SL. No.	Telemarketer Id	Telemarketer Name	Header Name	Date & Time of Application	Date & Time of Status Updated	Status	Action
1	1302158952540763333	MANUAL TM 10	MNLTY	30/05/2020, 14:21	30/05/2020, 14:24	Active	<b>Revoke</b>

A modal window titled "Header Revoke Confirmation" is open in the center. It contains the message "Are you sure you want to Revoke this Header?", a "Remarks" field with placeholder text "Please Enter Remarks", and two buttons: "Cancel" and "Yes". A red circle with the number 7 points to the "Yes" button. A red arrow points from this circle to the "Revoke" button in the table above. Below the table, another identical table is shown with the same data, but the "Status" column now shows "Revoked" instead of "Active". A red circle with the number 9 points to the "Revoked" status in this second table. A red arrow points from this circle to the "Revoke" button in the table above.

# CONSENT TEMPLATE

# CONSENT TEMPLATE – CREATION OF CONSENT TEMPLATE

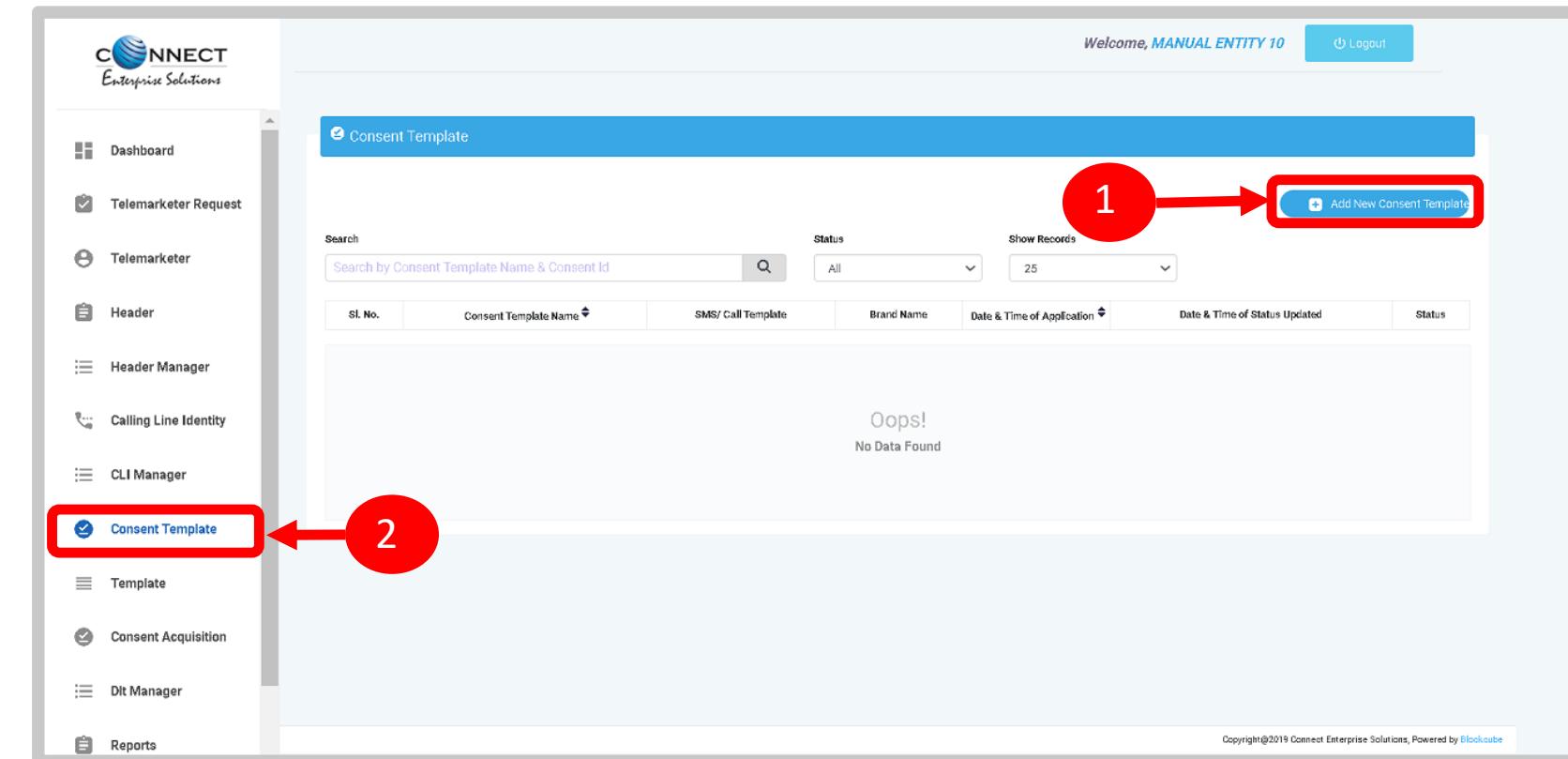
Consent Template is created to acquire prior consent from the customer to send commercial communication which are related to Service or Promotion of Product/Services of an Business Entity.

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

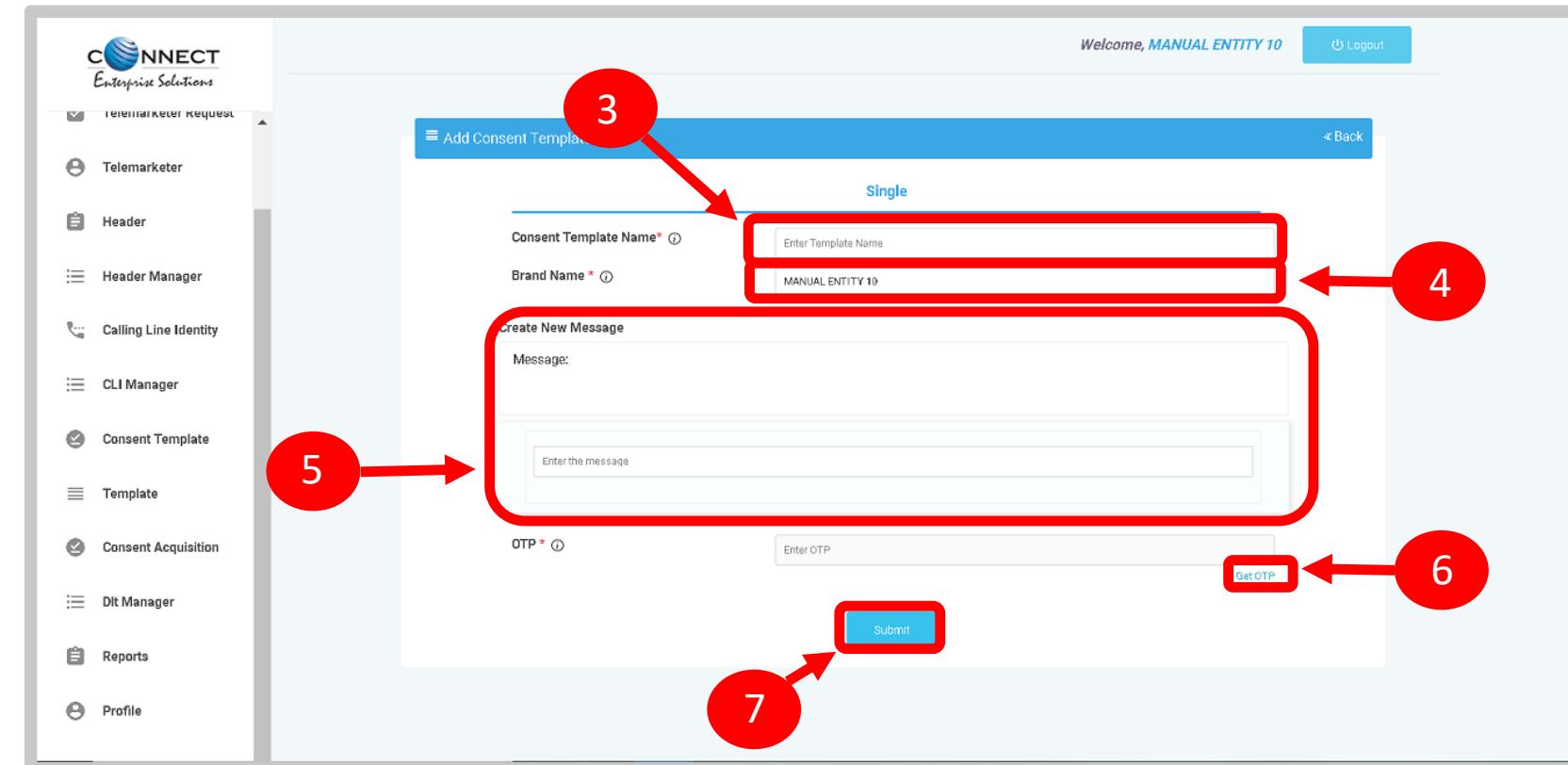
**3** To create a New Consent Template, first type an a relevant **Consent Template Name** as per the Entity business requirement.

**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.

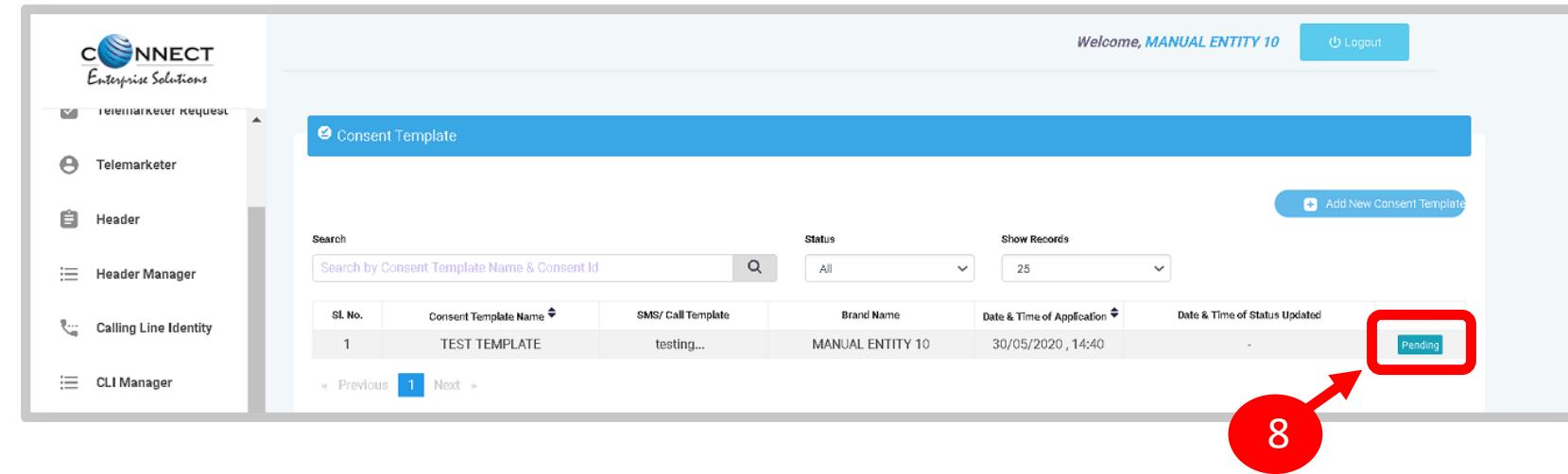
**7** Press **Submit** button to send the request to the Operator for approval.



# 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**.



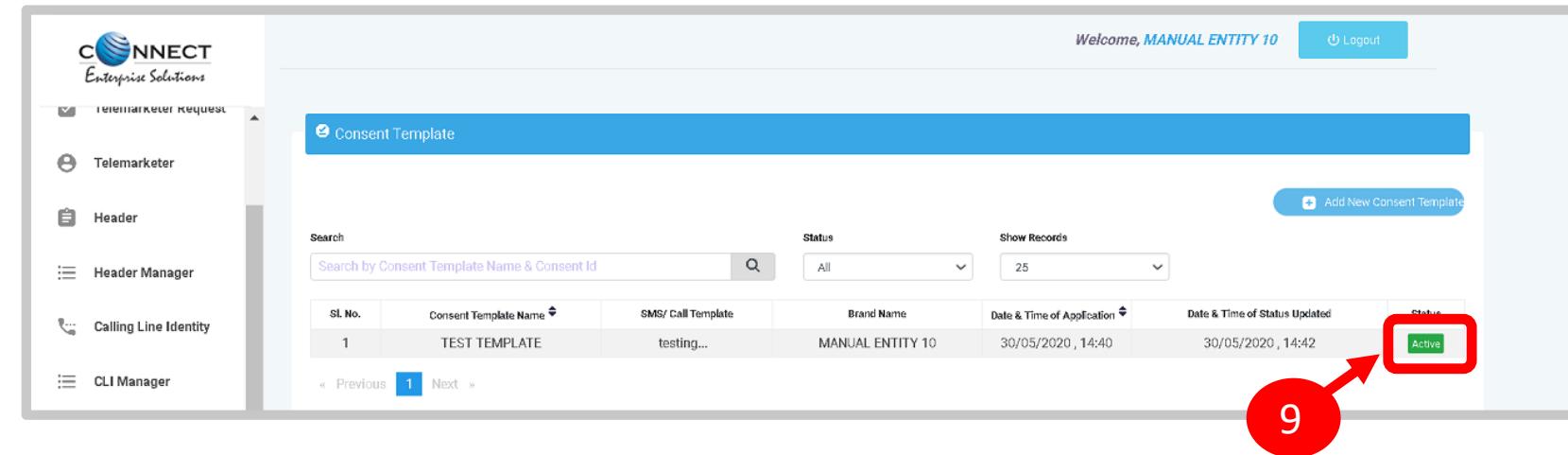
The screenshot shows the 'Consent Template' page with a single record listed:

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	-	Pending

A red circle with the number 8 points to the 'Pending' status button in the last column of the table.

**9**

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



The screenshot shows the 'Consent Template' page with the same record, but the status has been updated to 'Active':

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	30/05/2020, 14:42	Active

A red circle with the number 9 points to the 'Active' status button in the last column of the table.

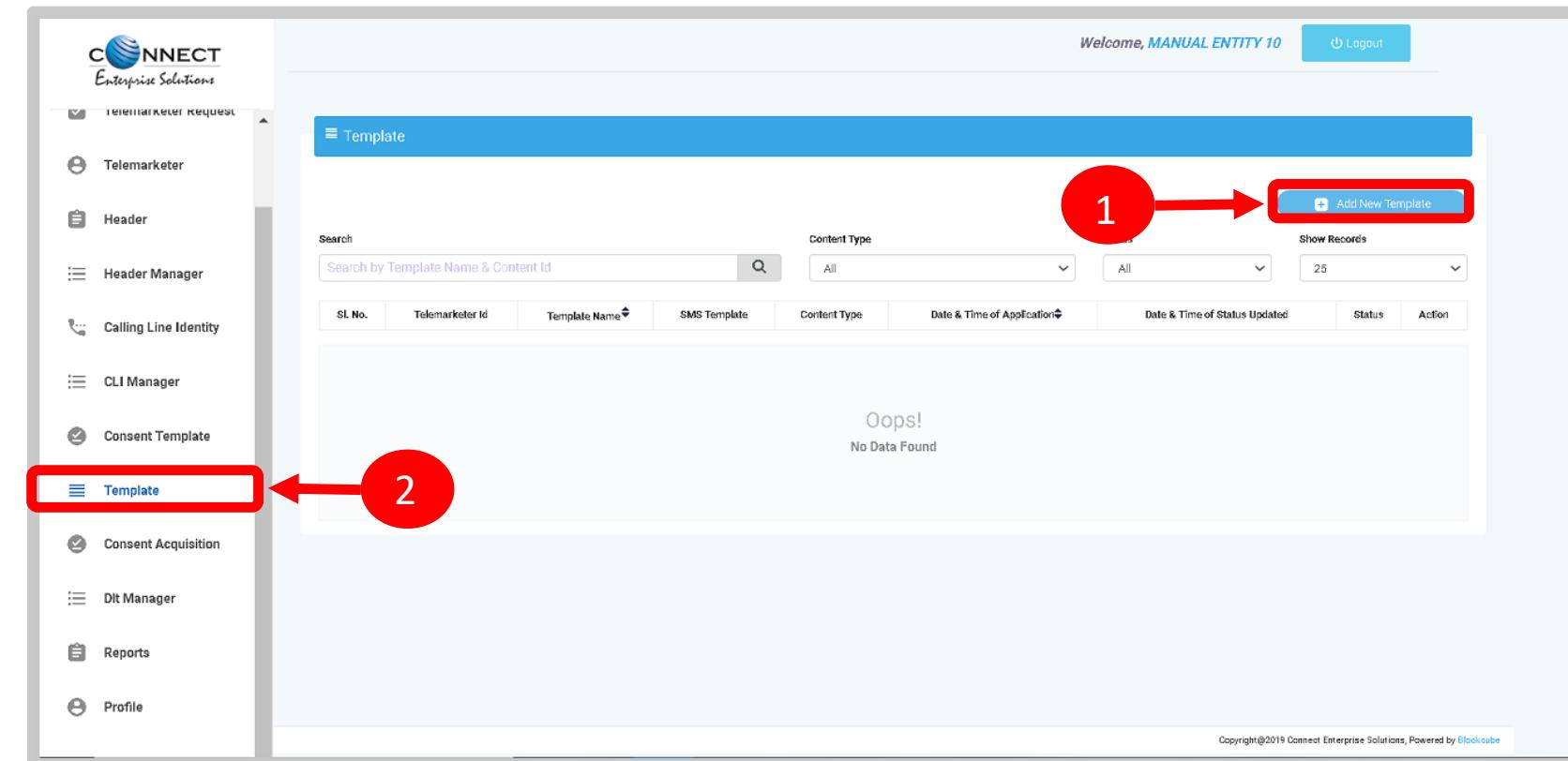
# TEMPLATE (CONTENT)

# 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.



# 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:

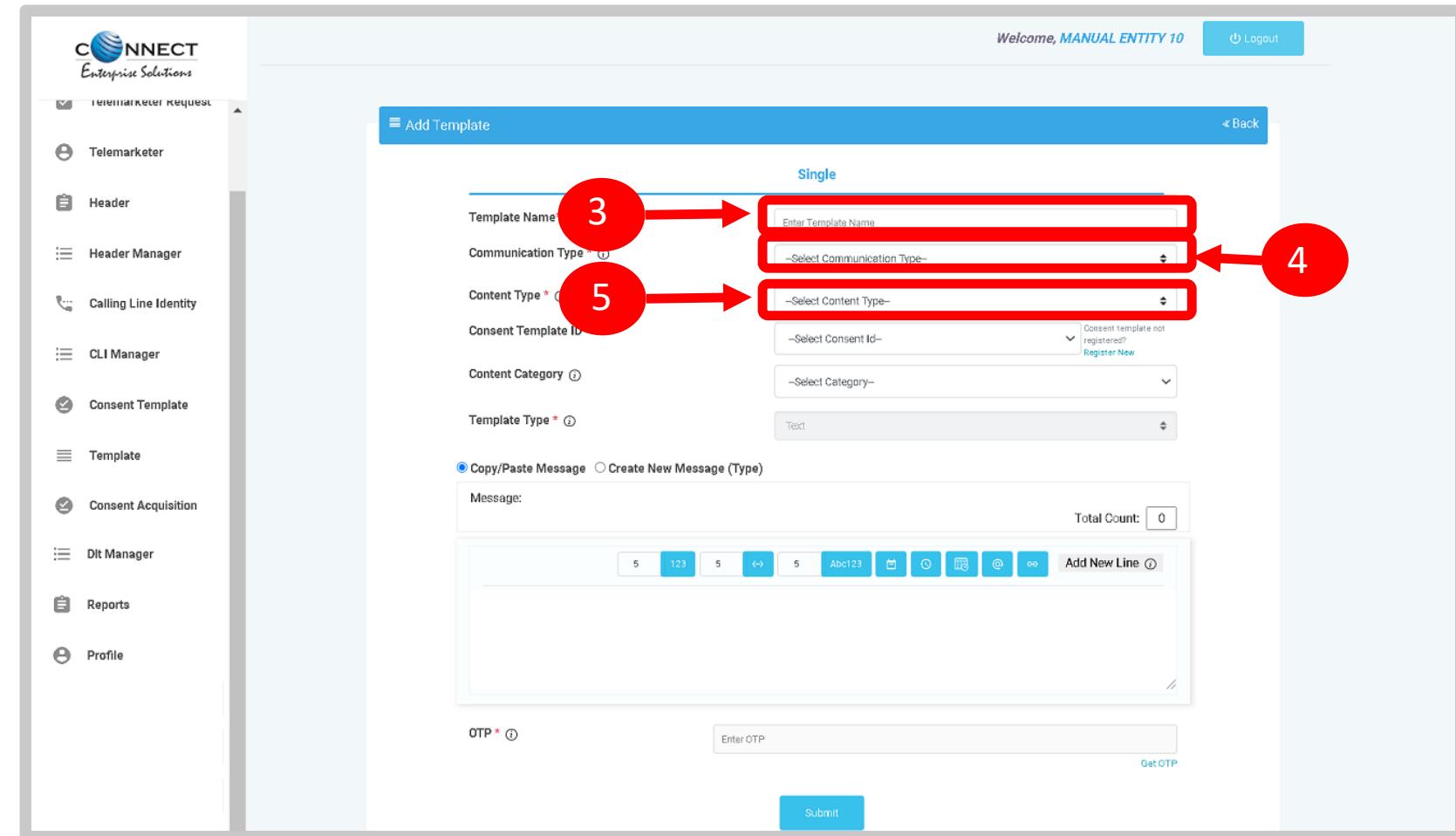
- SMS
- Call

**Note:** Currently SMS is only available for selection.

5

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

- Transactional
- Promotional
- Service Explicit
- Service Implicit



The screenshot shows the 'Add Template' interface. On the left is a sidebar with navigation links: Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, Reports, and Profile. The main area has a blue header 'Add Template' with a 'Single' option selected. Below it are several input fields and dropdowns:
 

- Template Name: A text input field with a red circle containing '3' above it.
- Communication Type: A dropdown menu with a red circle containing '4' to its right.
- Content Type: A dropdown menu with a red circle containing '5' to its right.
- Consent Template ID: A dropdown menu.
- Content Category: A dropdown menu.
- Template Type: A dropdown menu.
- Message area: A rich text editor with a 'Copy/Paste Message' radio button selected.
- OTP: An input field for entering a one-time password.
- Submit button: A blue button at the bottom right.

 A red box highlights the 'Communication Type' and 'Content Type' fields. Red arrows point from the numbered circles (3, 4, 5) to these highlighted fields.

# 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 case the Consent template is not created at the time of Template creation then choose the given **link** to create and register the same.

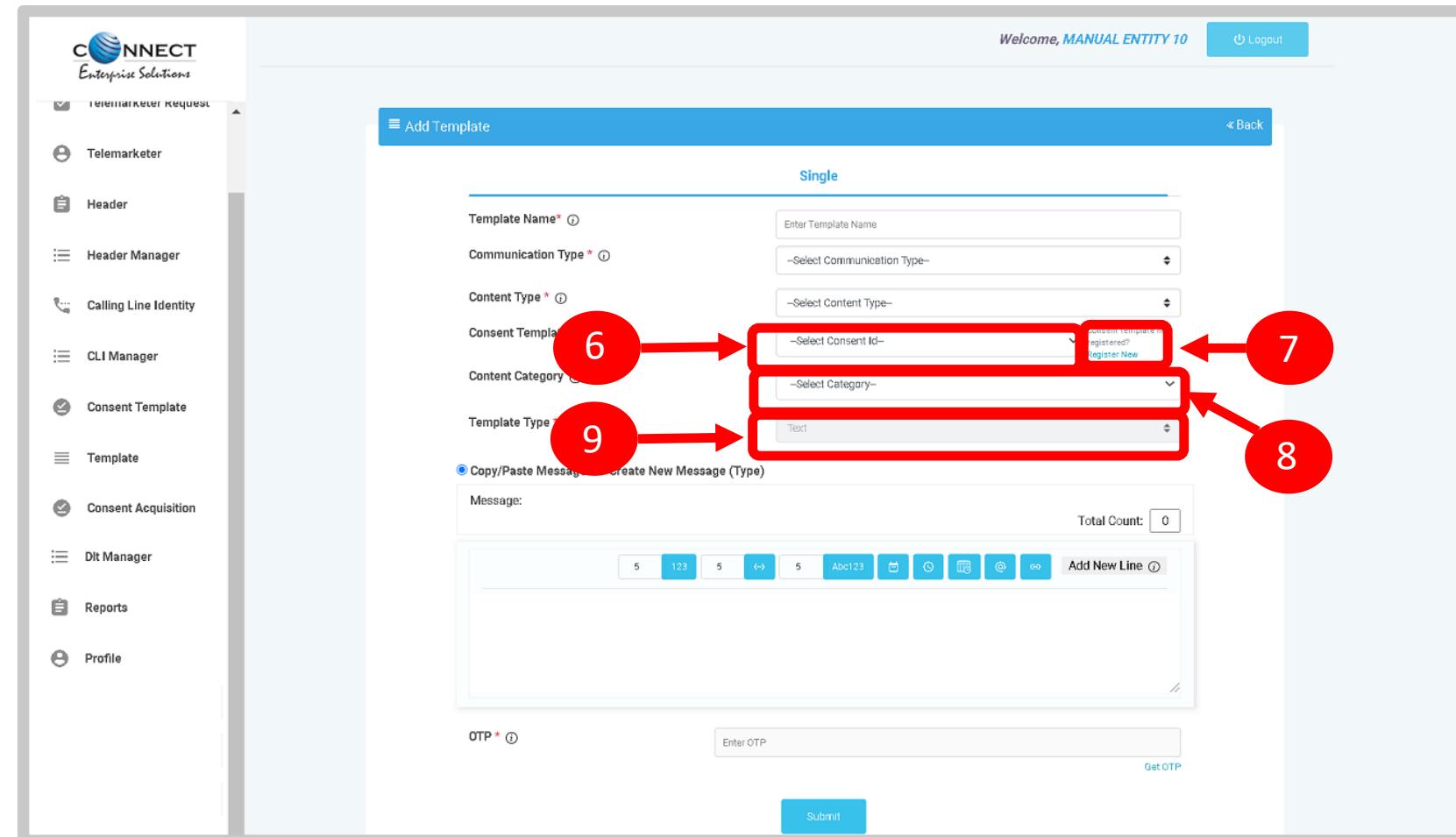
8

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

9

- In the **Template 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' screen in the CONNECT Enterprise Solutions software. The interface includes a sidebar with various menu items like Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, Reports, and Profile. The main area has a blue header 'Add Template' and a sub-header 'Single'. It contains fields for 'Template Name\*', 'Communication Type\*', 'Content Type\*', 'Consent Template\*', 'Content Category\*', and 'Template Type'. There are also sections for 'Copy/Paste Message' and 'Create New Message (Type)'. A message editor with a toolbar is present. At the bottom, there's an 'OTP\*' field with an 'Enter OTP' placeholder and a 'Get OTP' button, followed by a 'Submit' button. Red circles with numbers 6, 7, 8, and 9 point to the 'Consent Template' dropdown, 'Content Category' dropdown, 'Template Type' dropdown, and the 'Template Type' section respectively. A note 'Consent Template is not registered? Register New' is visible above the 'Consent Template' dropdown.

# TEMPLATE – CREATION OF CONTENT

In the Content creation section there are two options available:

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

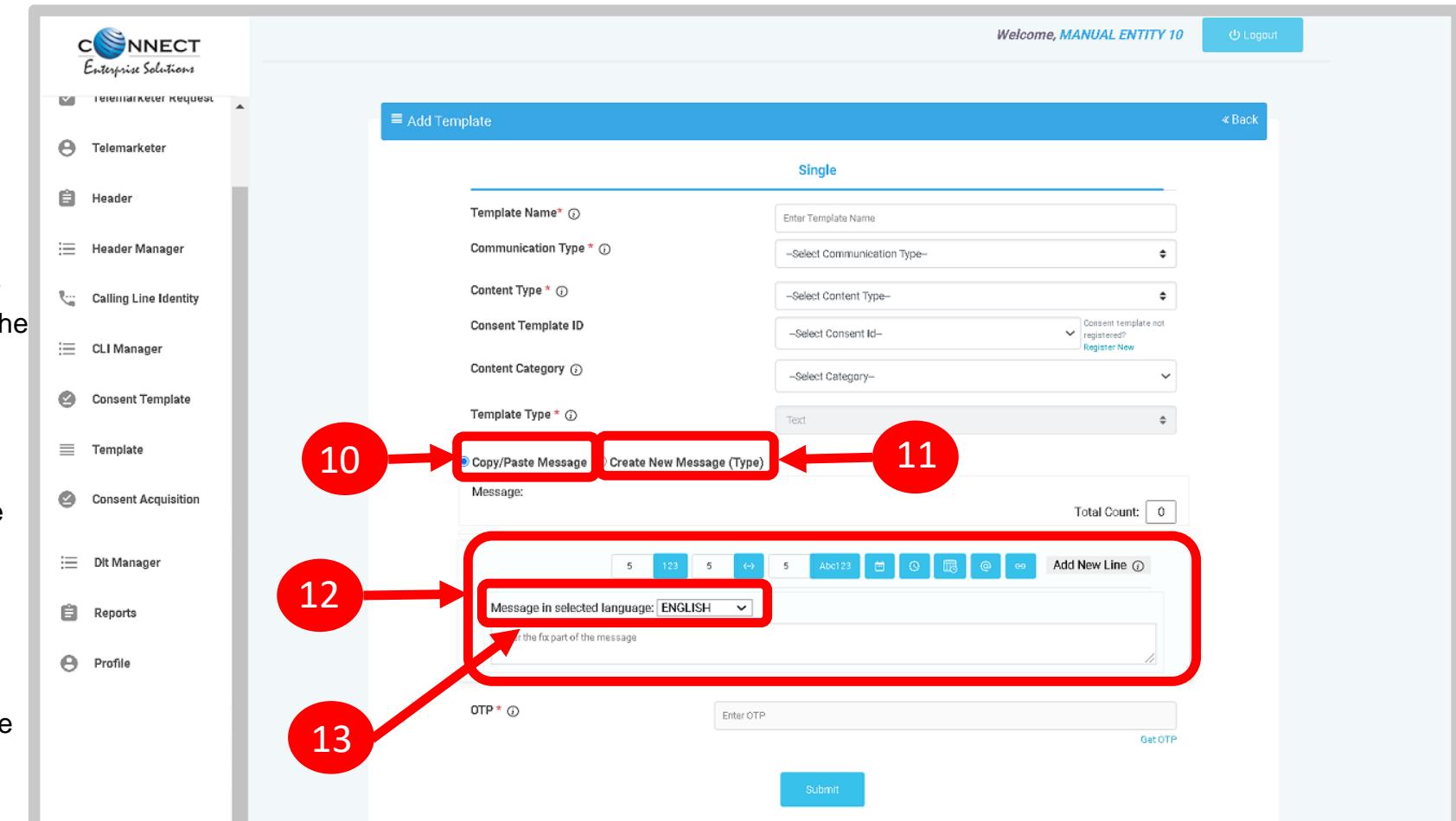
Select any of the option basis on the requirement of content creation.

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

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

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

**13** Messages in languages other than English can be created, such templates type will be treated as Unicode. Language can be selected from the dropdown list.



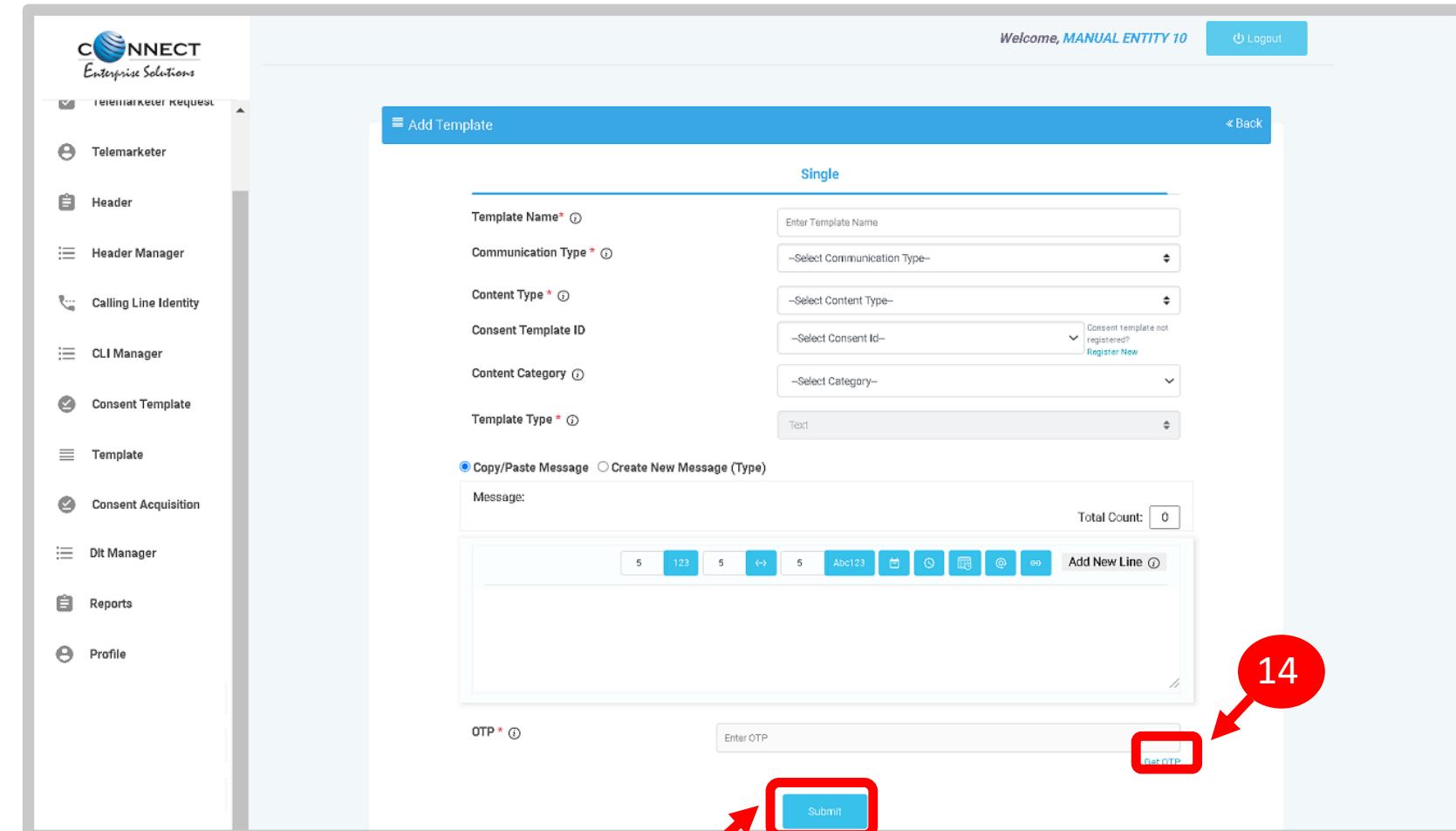
# TEMPLATE – OTP / REQUEST SUBMISSION

14

Press the **Get OTP** link to receive the One Time Password on your registered mobile and email id. Once received, type the same in OTP column to authenticate the process.

15

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

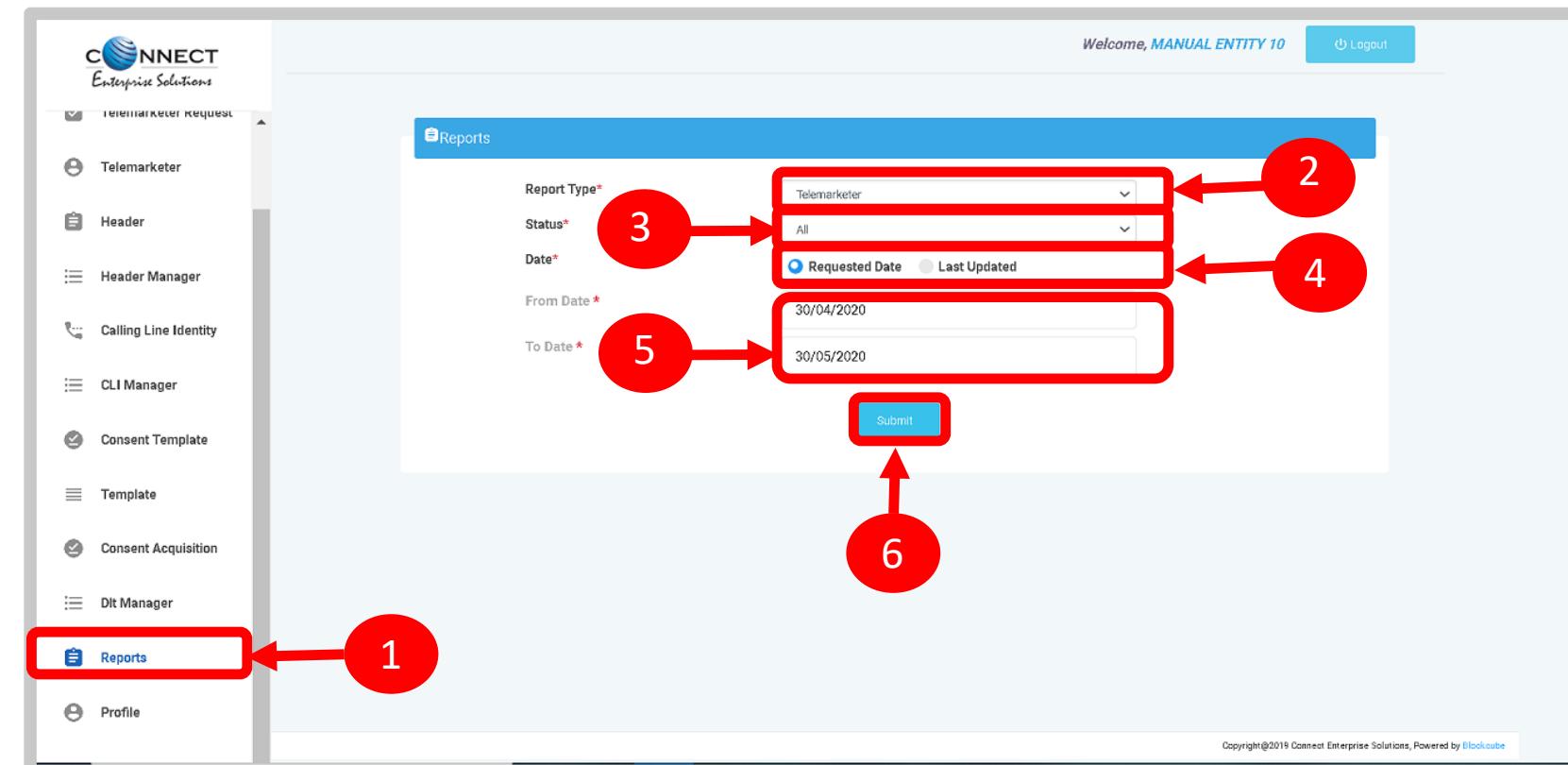


The screenshot shows the 'Add Template' page under the 'Template' section of the CONNECT Enterprise Solutions interface. The page is titled 'Add Template' and has a 'Single' configuration selected. It includes fields for 'Template Name\*', 'Communication Type\*', 'Content Type\*', 'Consent Template ID', 'Content Category', and 'Template Type\*'. Below these fields is a message editor with a rich text toolbar. At the bottom, there is an 'OTP\*' field with an 'Enter OTP' placeholder and a red-bordered 'Get OTP' button. A red callout bubble labeled '14' points to the 'Get OTP' button. Another red callout bubble labeled '15' points to the 'Submit' button at the bottom right of the page.

# 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.



Welcome, MANUAL ENTITY 10 Logout

**Reports**

Report Type\* Telemarketer 2

Status\* All 4

Date\*  Requested Date Last Updated

From Date\* 30/04/2020 5

To Date\* 30/05/2020

Submit 6

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# ENTITY PROFILE

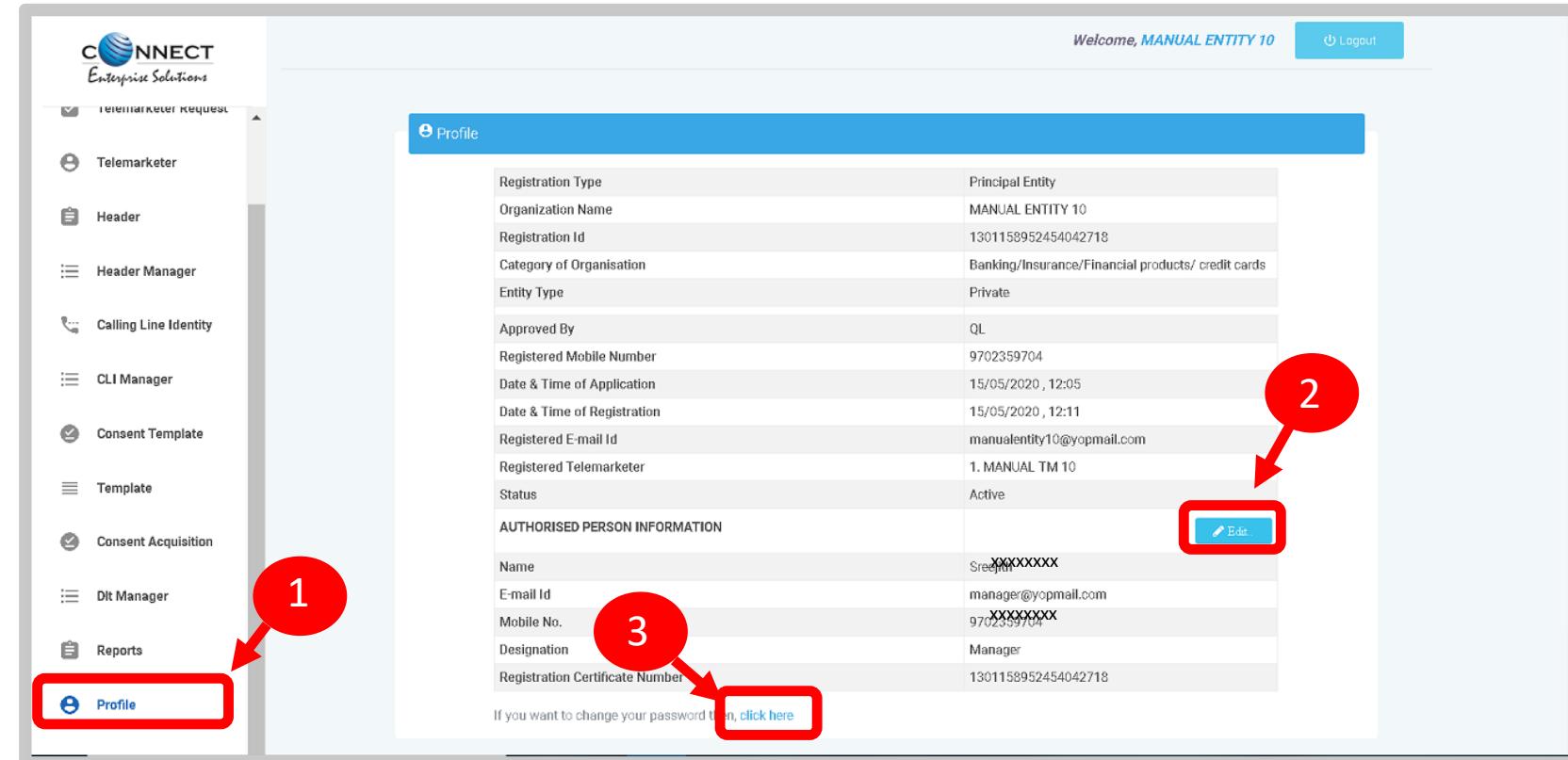
# PROFILE PAGE

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 of the CONNECT Enterprise Solutions application. The sidebar on the left lists various modules: Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The 'Profile' module is highlighted with a red box and a red number '1' pointing to it. The main content area is titled 'Profile' and displays entity registration details. A red box highlights the 'Edit' button in the 'AUTHORIZED PERSON INFORMATION' section, with a red number '2' pointing to it. At the bottom of the page, there is a link 'If you want to change your password then, click here' which is also highlighted with a red box and a red number '3' pointing to it.

Registration Type	Principal Entity
Organization Name	MANUAL ENTITY 10
Registration Id	1301158952454042718
Category of Organisation	Banking/Insurance/Financial products/ credit cards
Entity Type	Private
Approved By	QL
Registered Mobile Number	9702359704
Date & Time of Application	15/05/2020, 12:05
Date & Time of Registration	15/05/2020, 12:11
Registered E-mail Id	manualentity10@yopmail.com
Registered Telemarketer	1. MANUAL TM 10
Status	Active
<b>AUTHORISED PERSON INFORMATION</b>	
Name	Sreemati XXXXXXXX
E-mail Id	manager@yopmail.com
Mobile No.	9702359704 XXXXXXXX
Designation	Manager
Registration Certificate Number	1301158952454042718

If you want to change your password then, [click here](#)

# PROFILE UPDATE PAGE

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

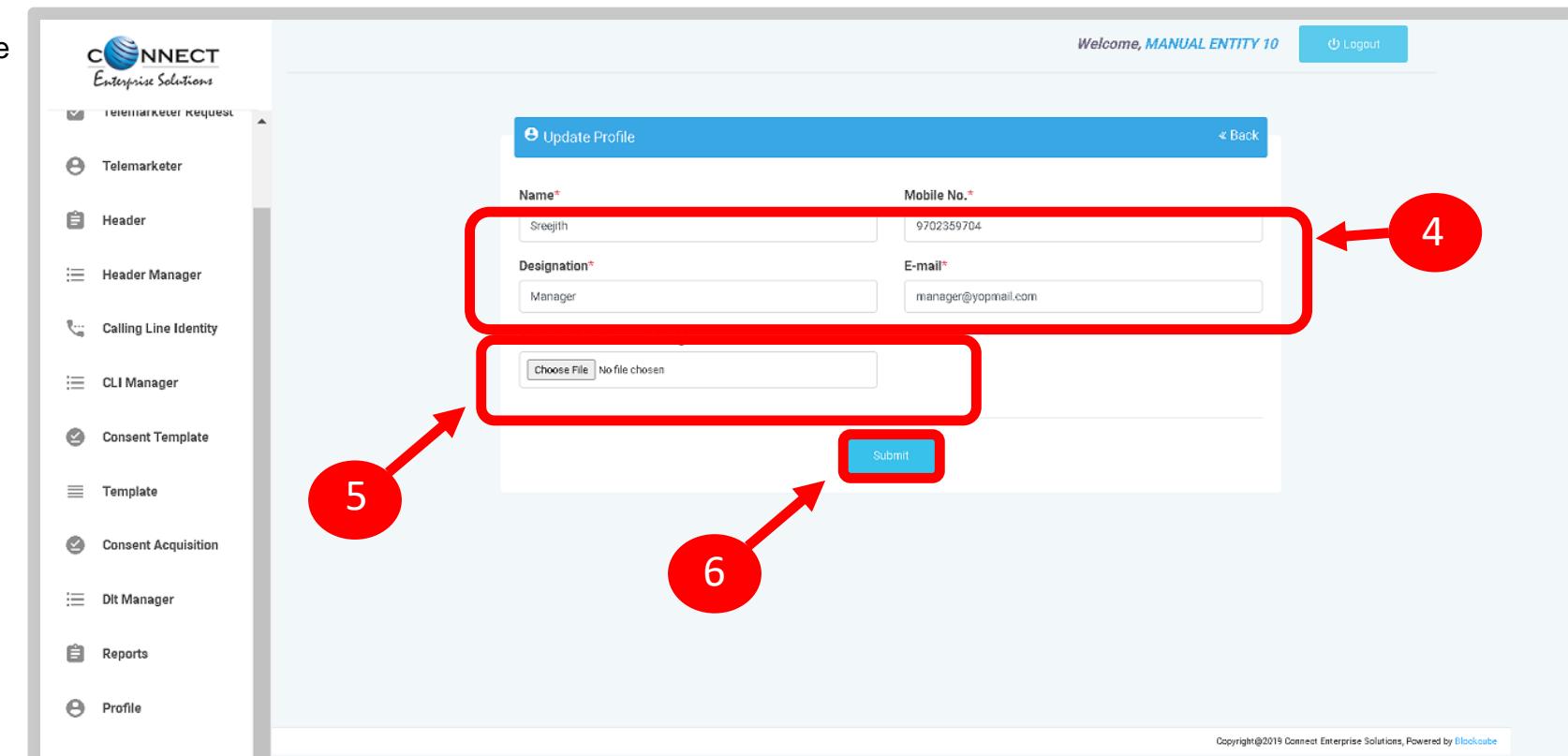
- Name of the Authorized Person
- Designation of the Authorized Person
- Mobile number of the Authorized Person
- Email ID of the Authorized Person

**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 right, it says 'Welcome, MANUAL ENTITY 10' and has a 'Logout' button. On the left is a sidebar with icons and labels: Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, Reports, and Profile. The main area has a blue header 'Update Profile'. It contains four text input fields: 'Name\*' with 'Sreejith' entered, 'Mobile No.\*' with '9702359704' entered, 'Designation\*' with 'Manager' entered, and 'E-mail\*' with 'manager@yopmail.com' entered. Below these is a file input field with 'Choose File' and 'No file chosen'. At the bottom right is a blue 'Submit' button. Red numbers 4, 5, and 6 with arrows point to the top row of fields, the file input field, and the 'Submit' button respectively.

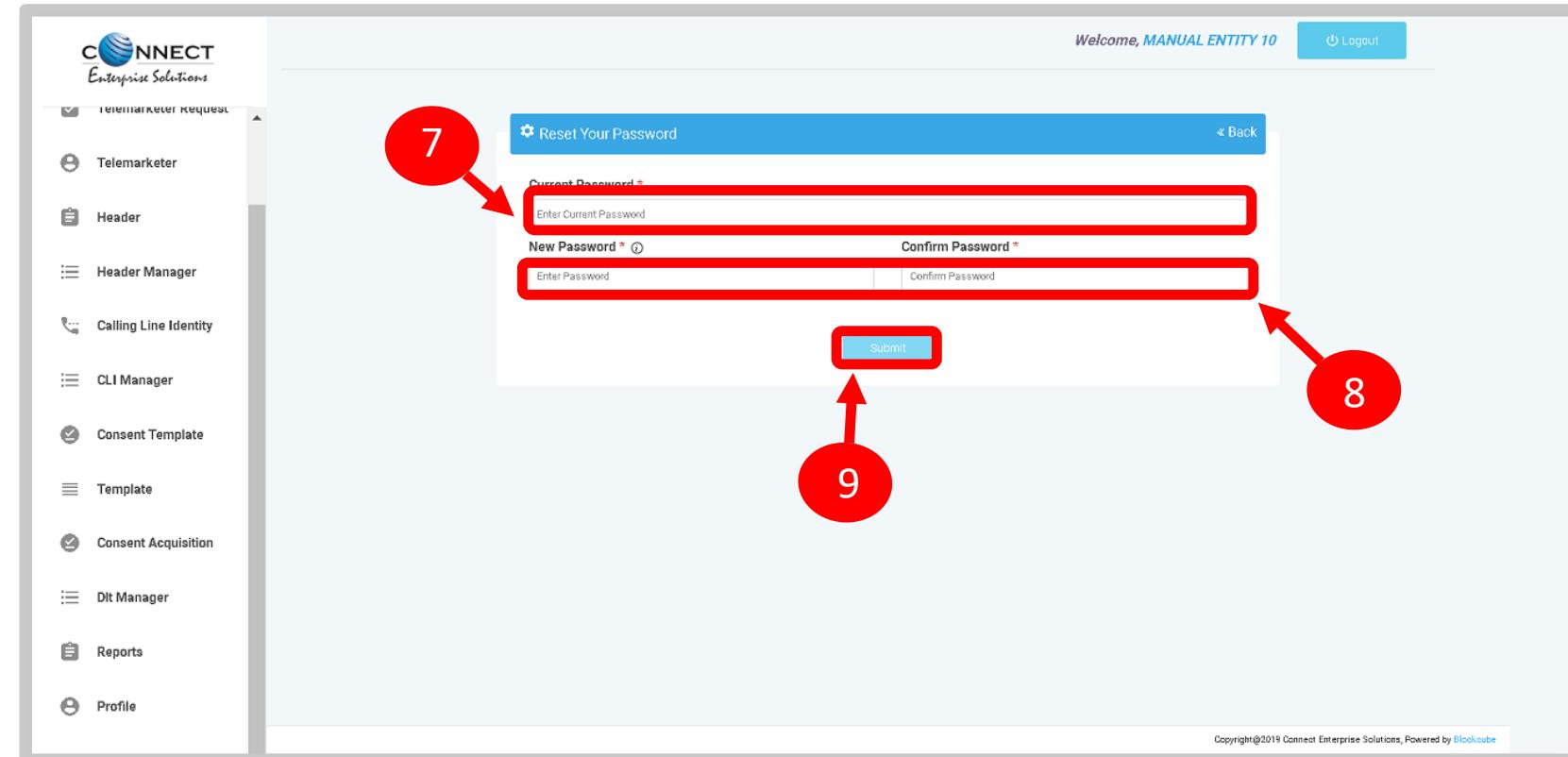
## PROFILE – CHANGE PASSWORD

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.



# 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 !