

**SMART ENTERPRISE**  
S O L U T I O N S

Welcome to Smart Enterprise Solutions

**USER MANUAL**  
**ENTITY**

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## USER FUNCTIONALITY

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# WEBSITE / LANDING PAGE

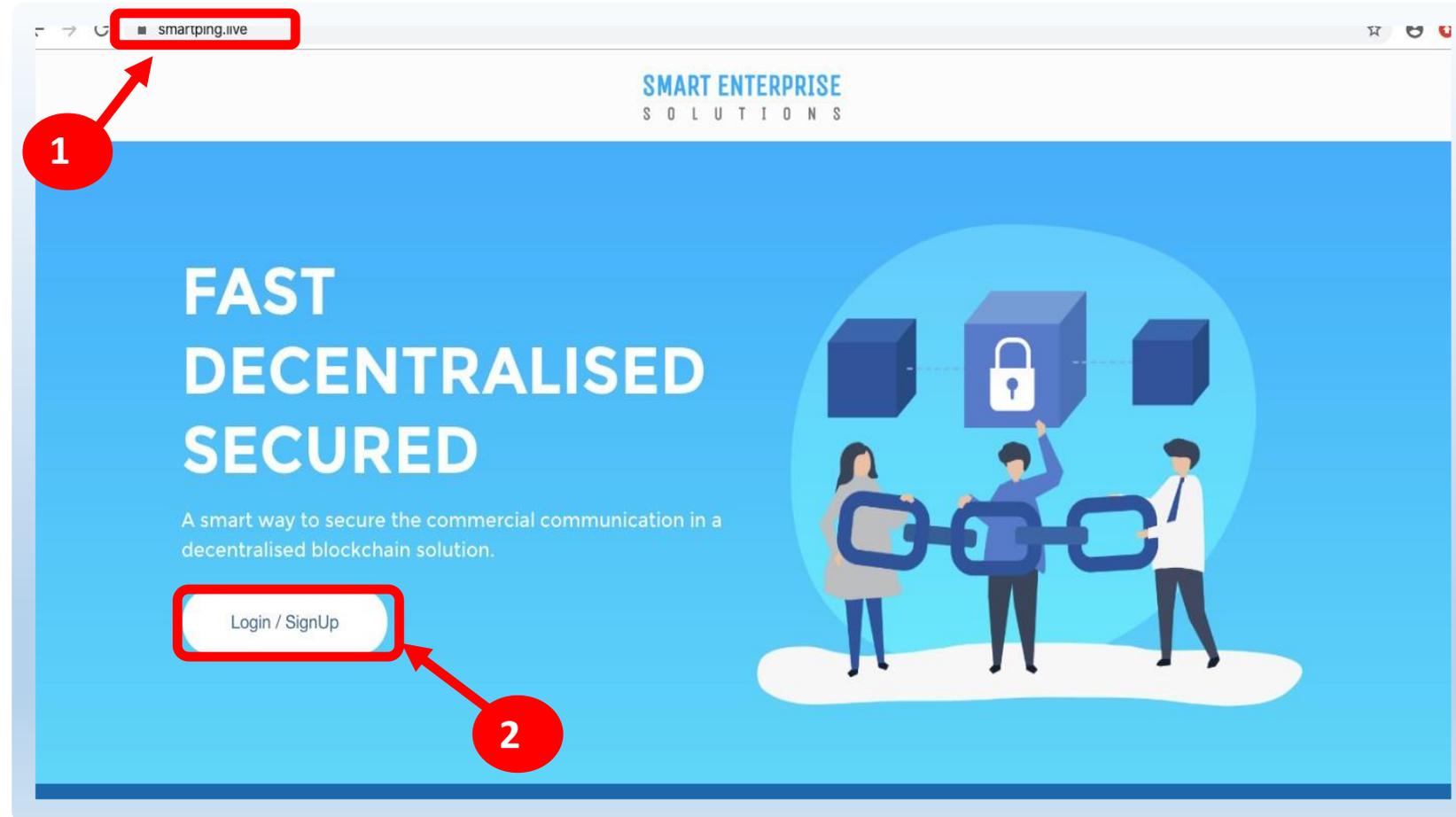
1 Visit <https://www.smartping.live> URL to Login/Register yourself as Entity/Telemarketer

✘ Incorrect URL: [www.smartping.live](http://www.smartping.live)

✔ Correct URL: <https://www.smartping.live>

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

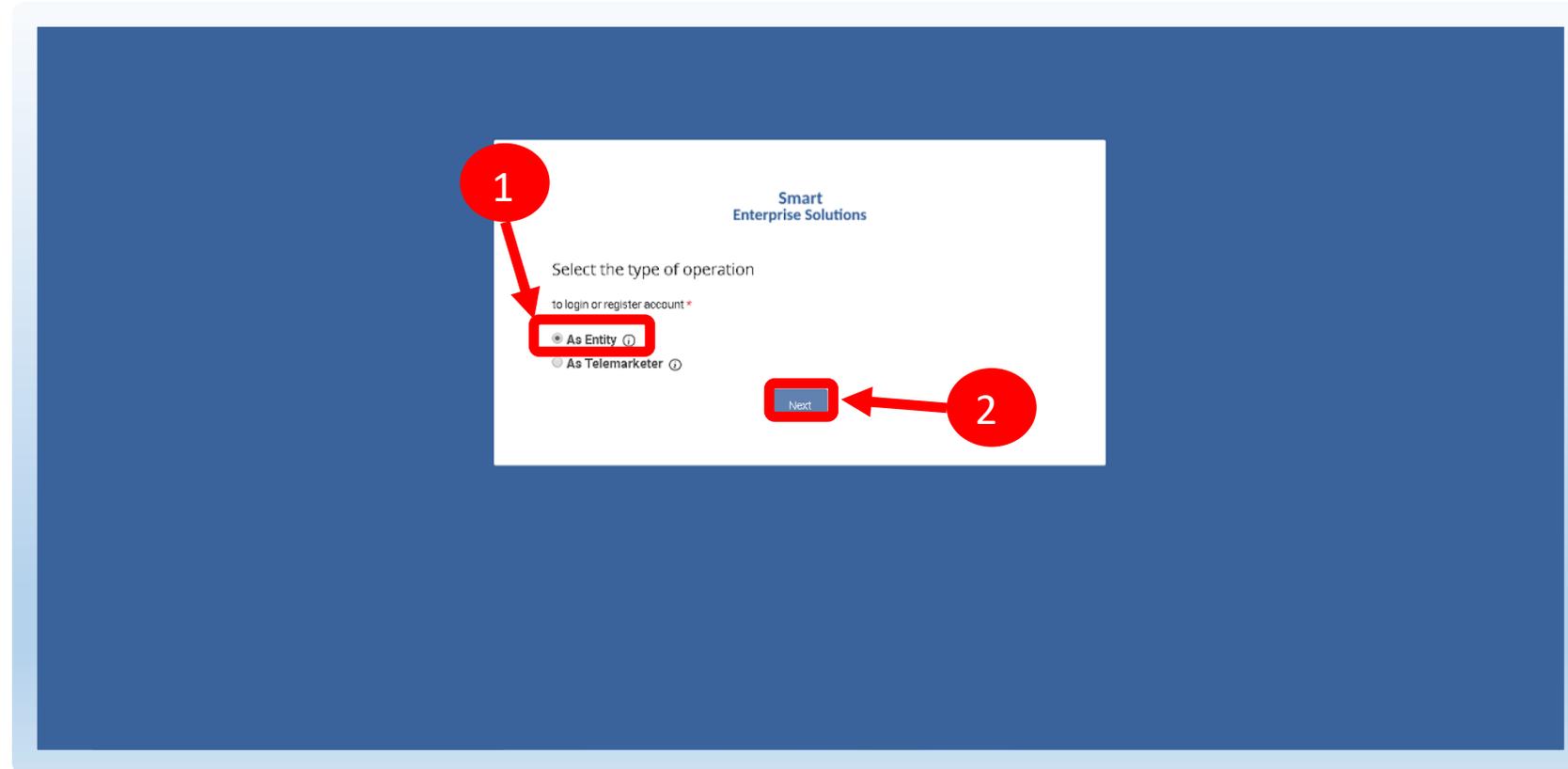
**1** To register yourself as an Entity on the portal, select the “**As Entity**” option in the Type of Operation.



*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.



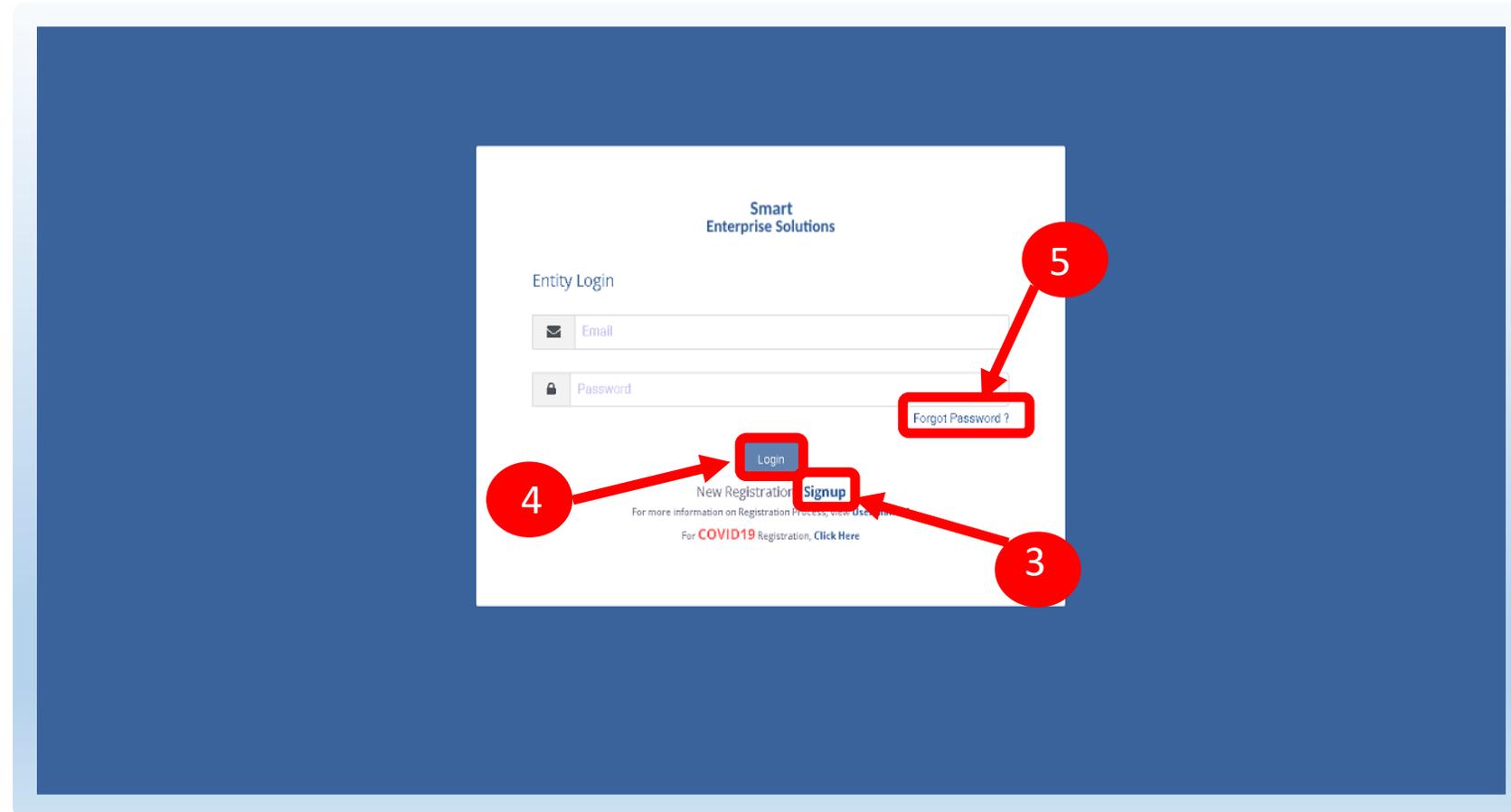
# REGISTRATION - ENTITY LOGIN /SINGUP PAGE

**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 Entity.

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

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

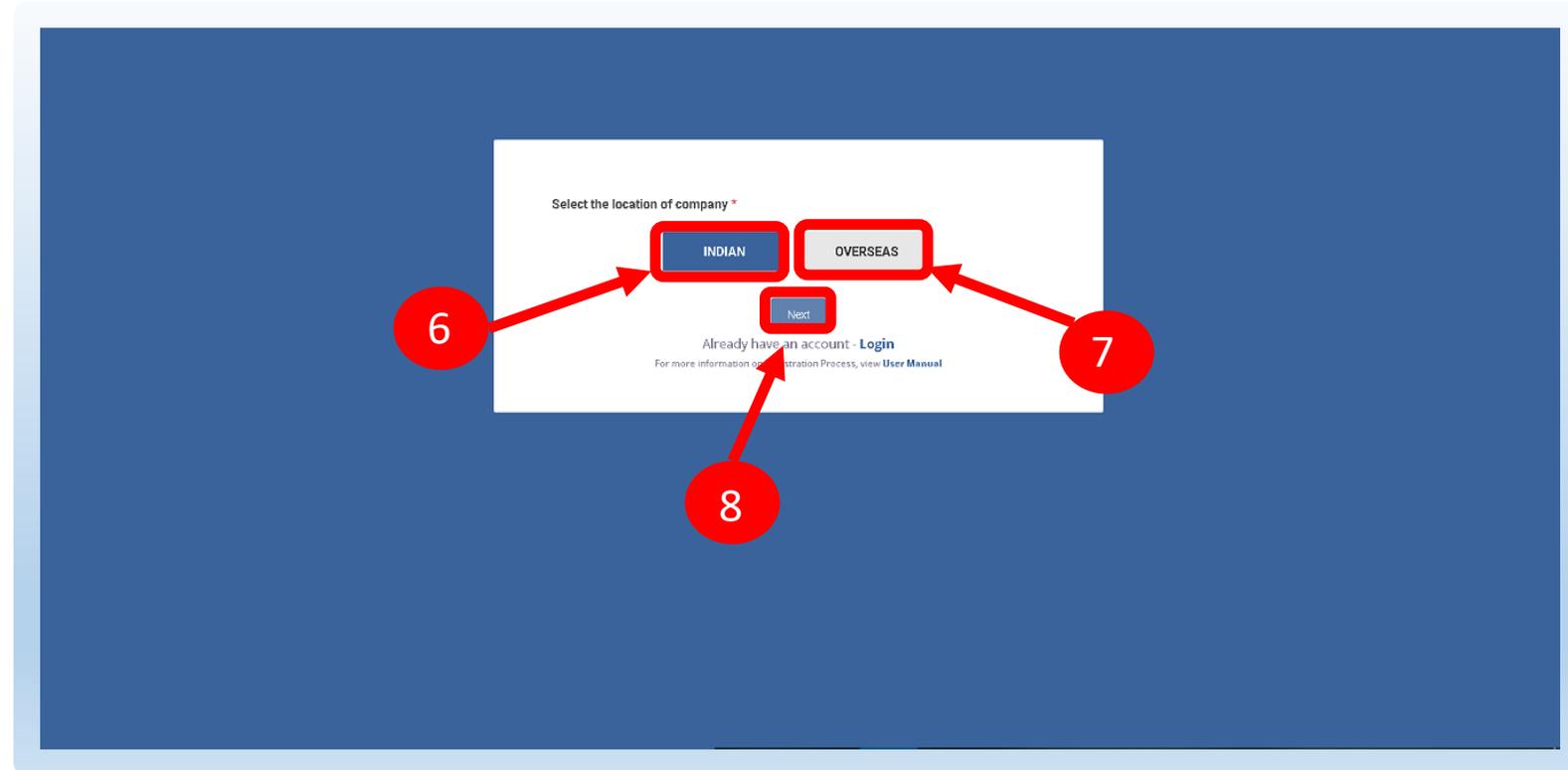


## REGISTRATION - SELECT COMPANY LOCATION

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

Duly fill the customer acquisition form and submit.

The screenshot displays the 'Smart Enterprise Solutions' interface for a 'CUSTOMER ACQUISITION FORM'. The top section shows a selection menu with 'New Registration' highlighted and circled in red, with a red circle containing the number '1' and an arrow pointing to it. Below this, a modal dialog box is open, containing the following text:

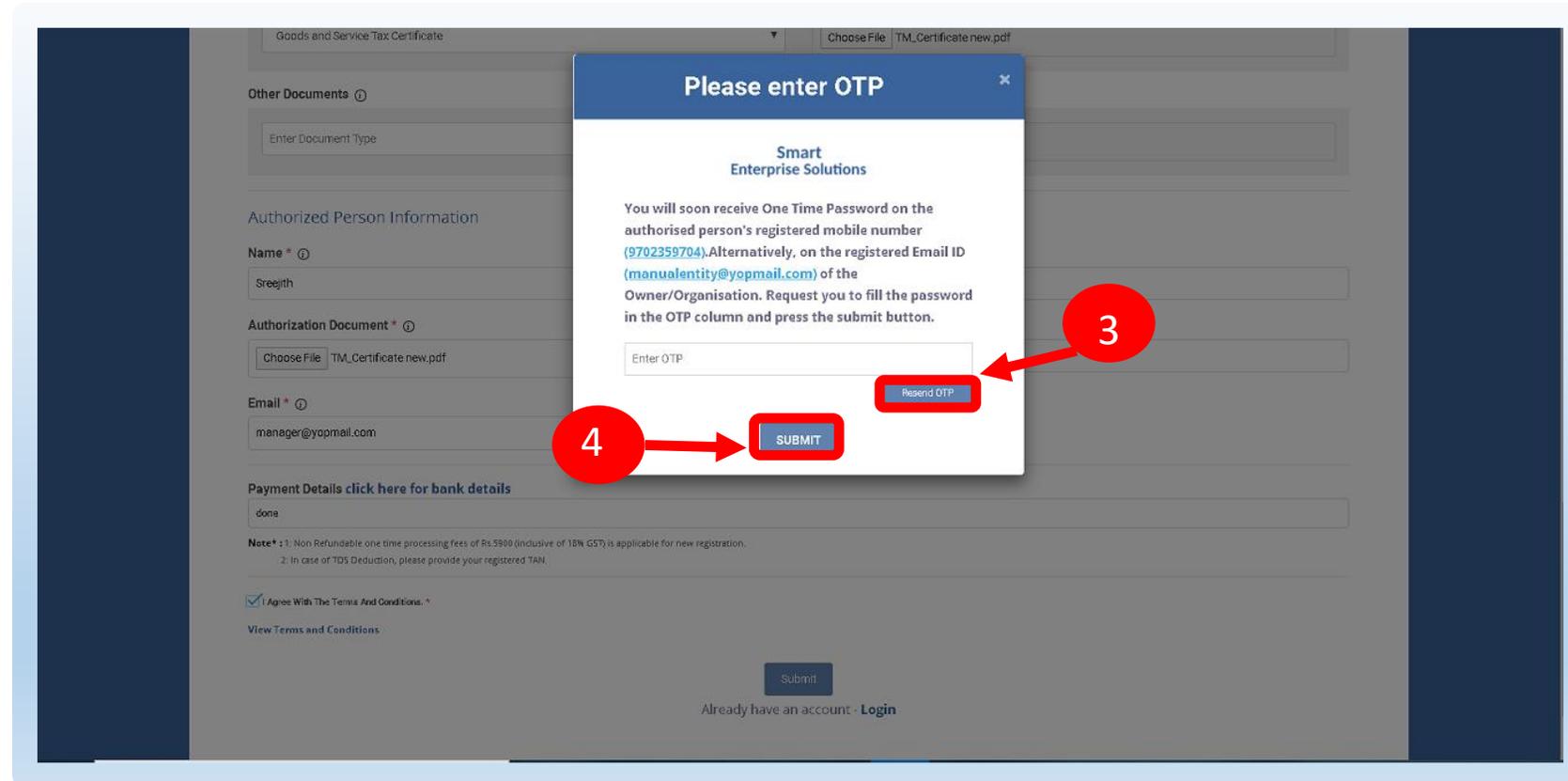
- 1. Non Refundable one time processing fees of Rs.5900 (inclusive of 18% GST) is applicable for new registration.
- 2. In case of TDS Deduction, please provide your registered TAN.

Below the text in the modal, there is an 'Ok' button circled in red, with a red circle containing the number '2' and an arrow pointing to it. The background form is dimmed and includes fields for 'Name Of Organization \*', 'Registered Email Id \*', and 'Company Address' (with sub-fields for 'CURRENT' and 'REGISTERED').

# 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.

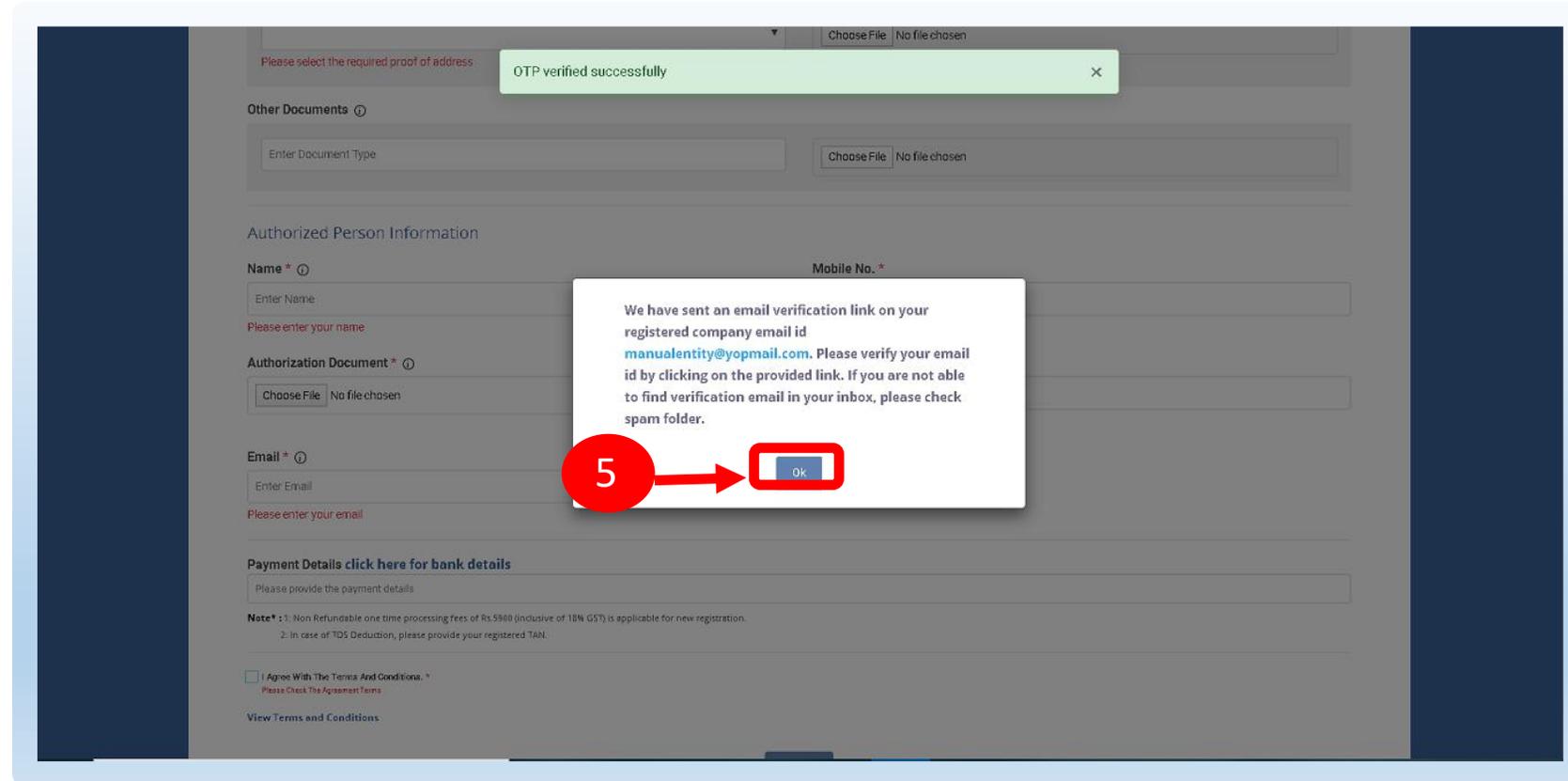
**4** If in case OTP not received, click **Resend** button



# 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.

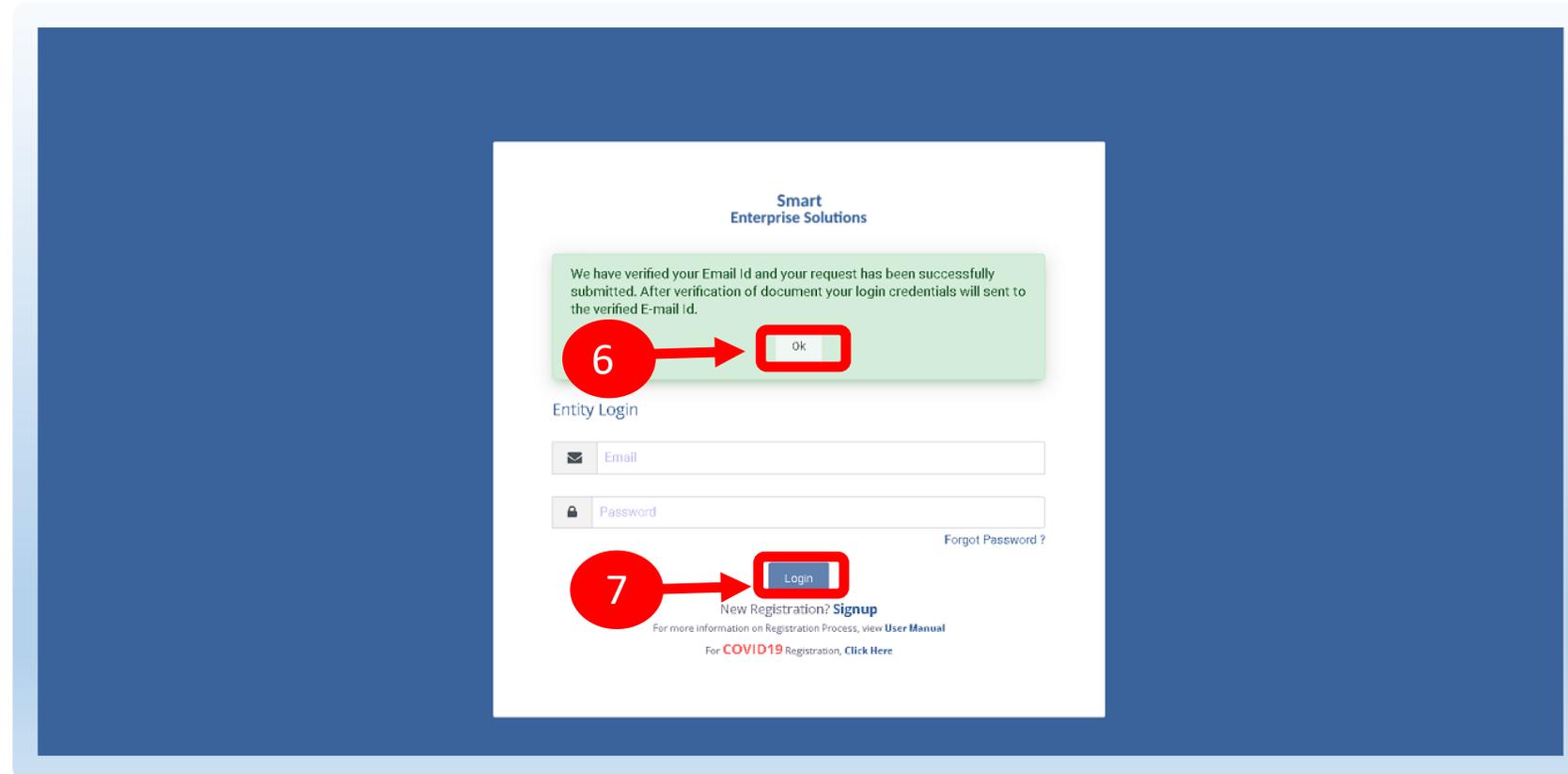


# NEW ENTITY REGISTRATION - EMAIL VERIFICATION CONFIRMATION

**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**

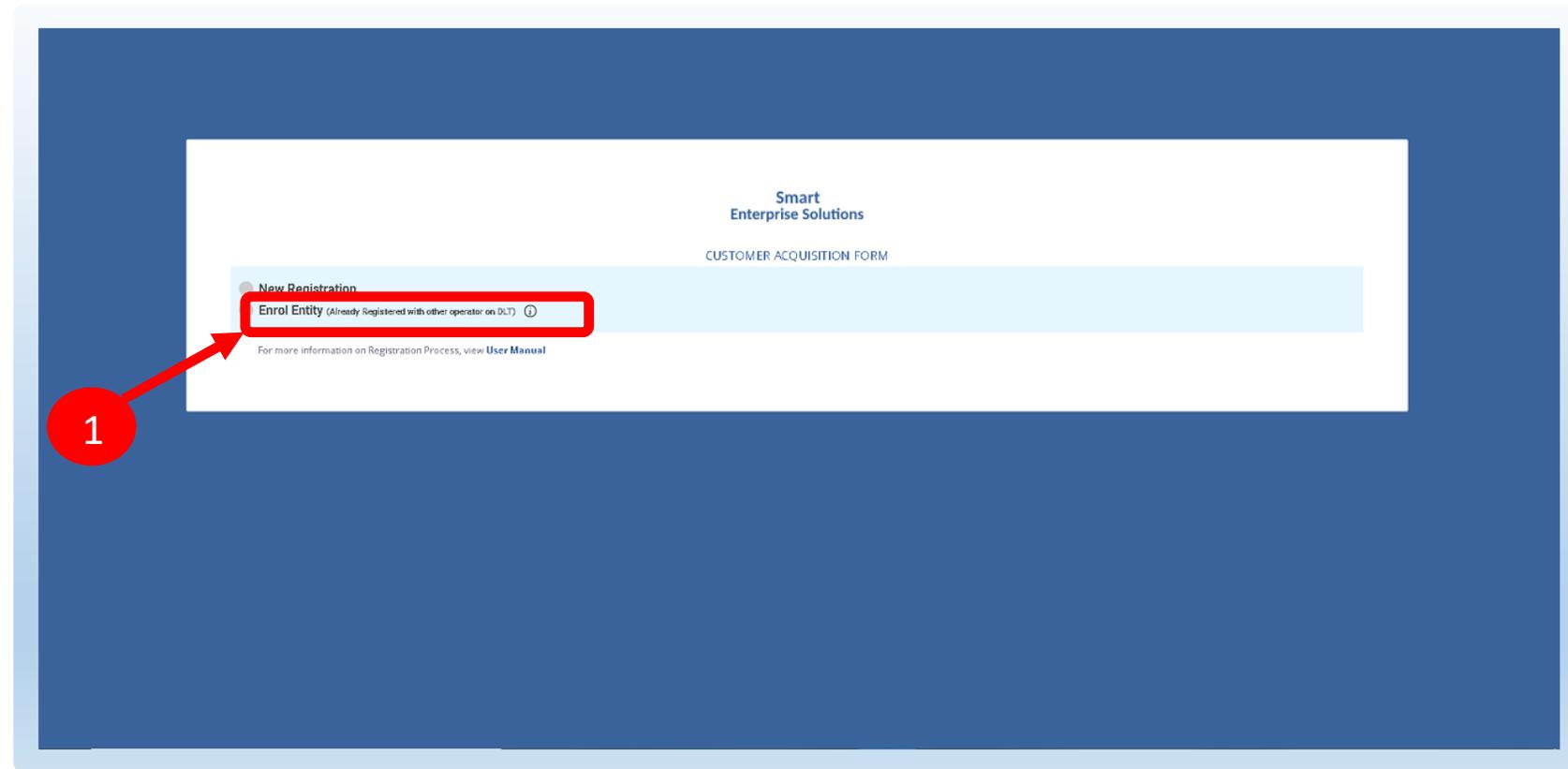


# ENROL ENTITY (ALREADY REGISTERED)

# 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

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

Smart Enterprise Solutions  
CUSTOMER ACQUISITION FORM

New Registration

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

**Entity Id \***  
Enter Entity Id

[View Details](#)

**Date Of Registration \***

**Name Of Organization \***  
Enter Organization Name

**Entity Type \***  
--Select Entity Type--

**Registered Email Id \* ⓘ**  
Enter Email

**Category of Organization \***  
--Select Organization--

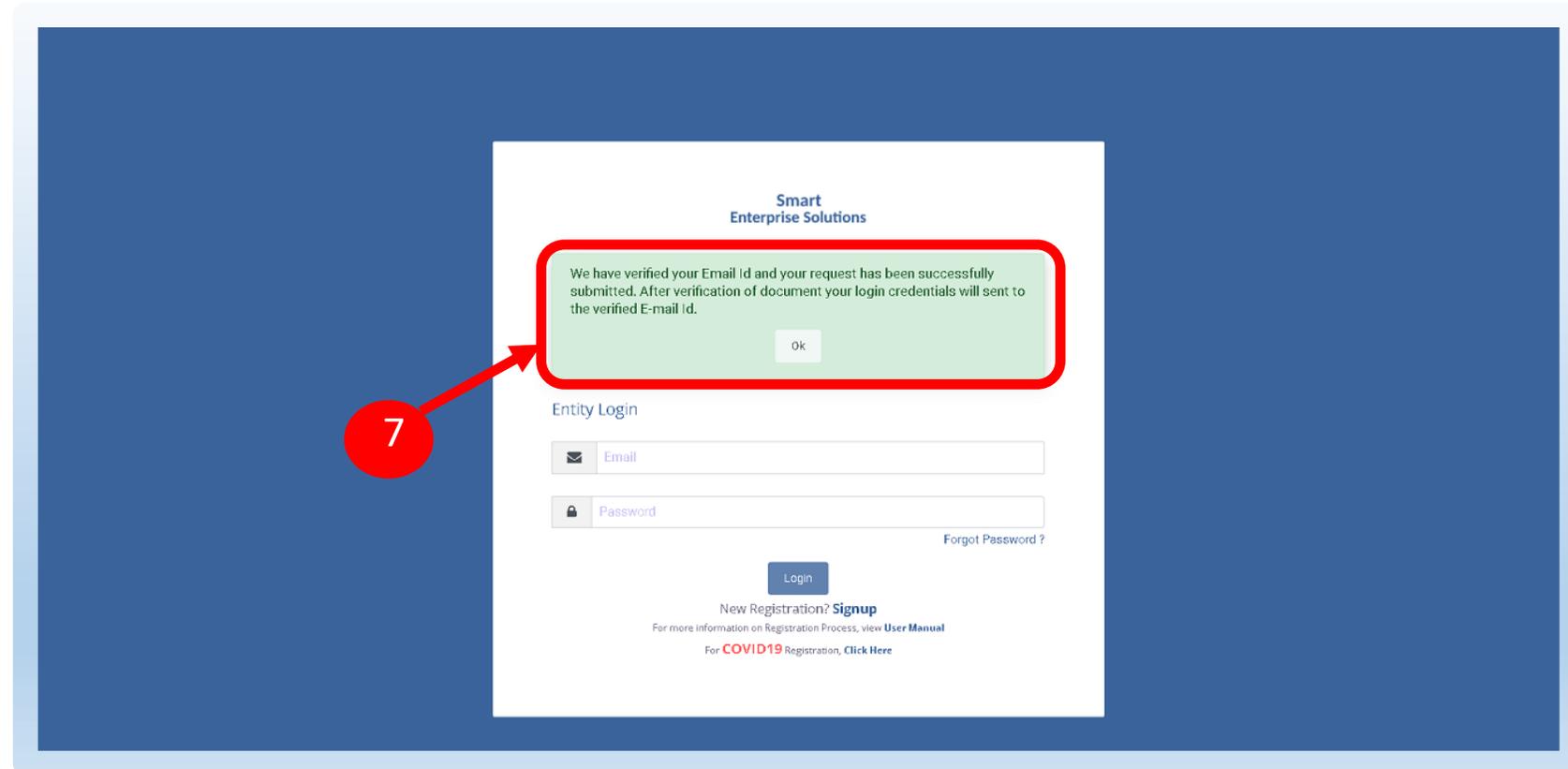
**3**

# 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

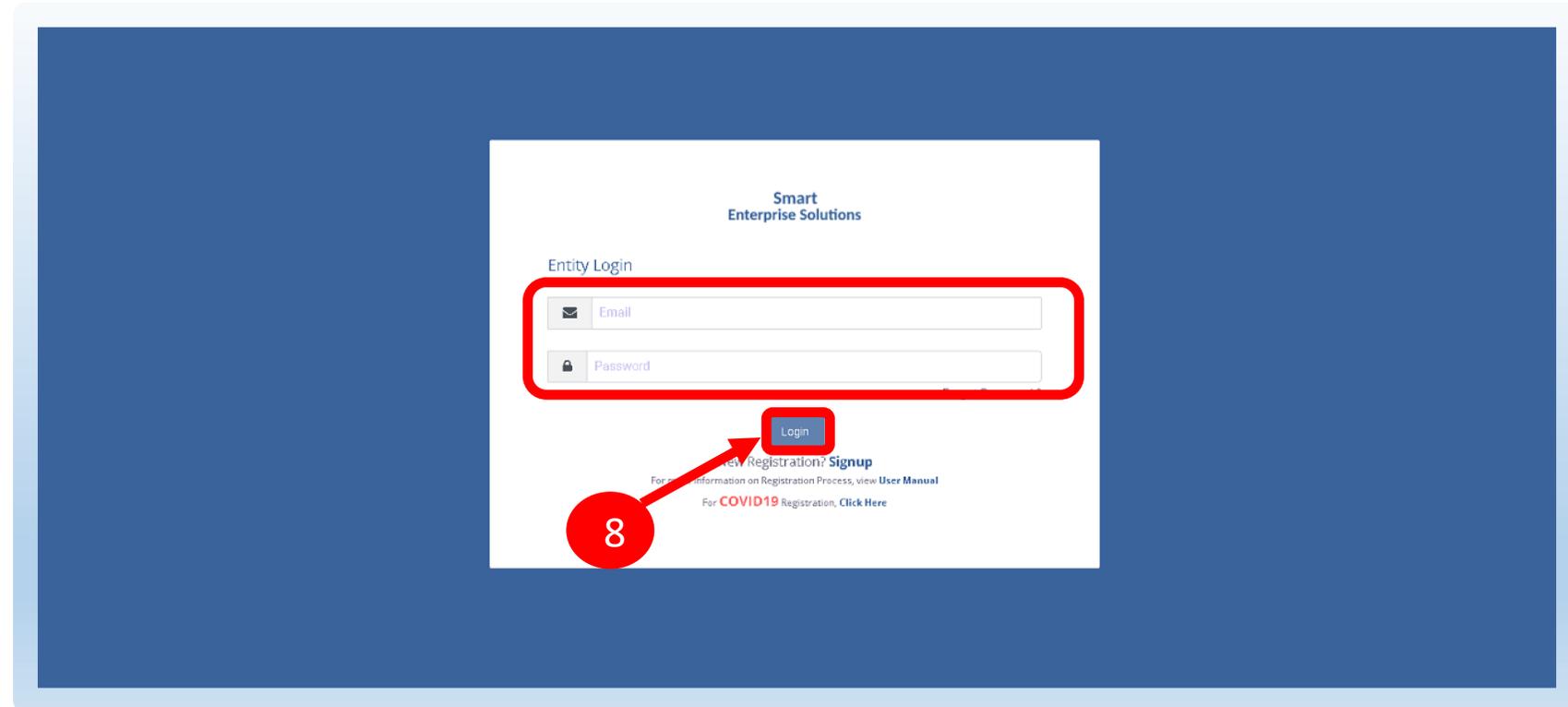
**7** After email verification Click **OK.** button to confirm. Once Operator approves your application, you will receive login credentials on your registered email id.



## 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.



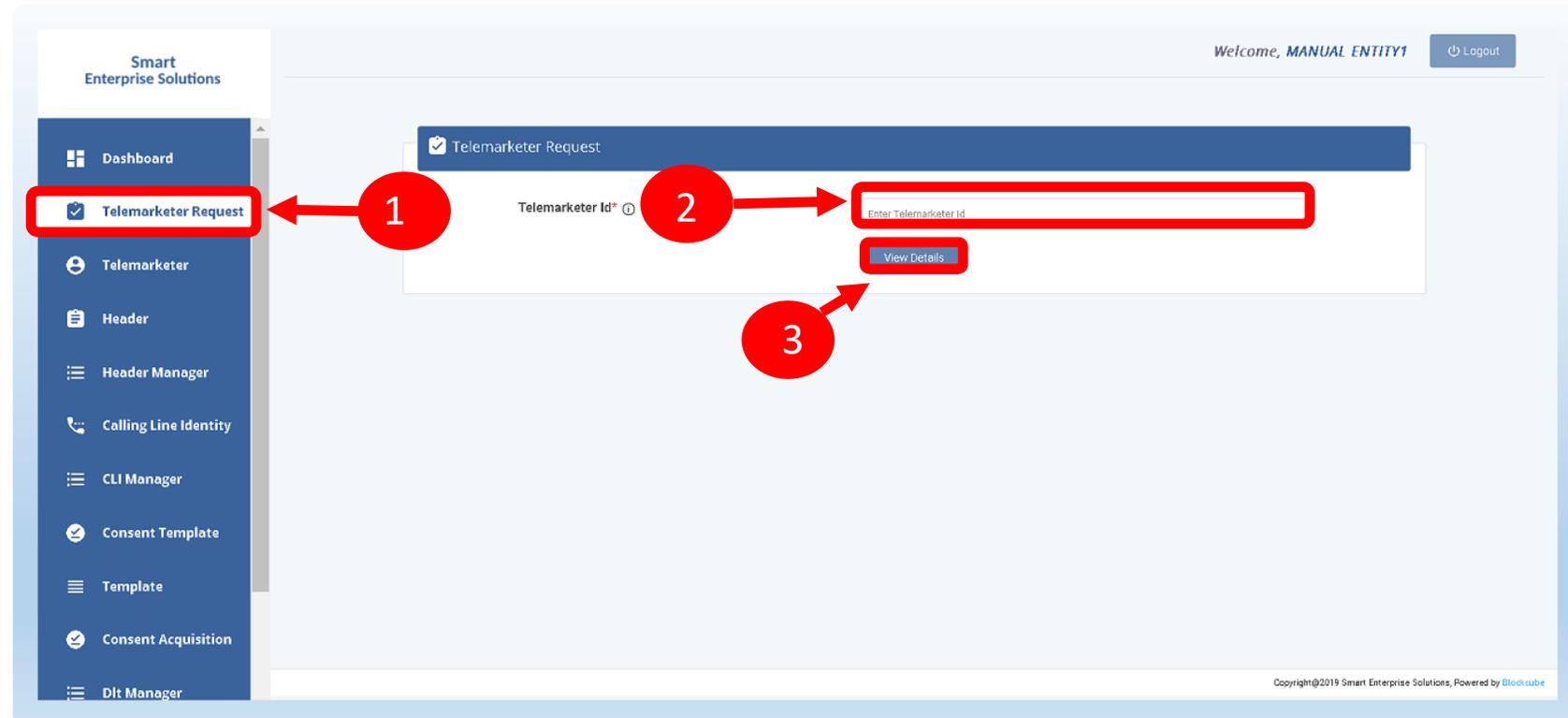
# ENTITY – TELEMARKETER REQUEST

# 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

The screenshot shows the 'Telemarketer Request' form in the Smart Enterprise Solutions interface. The form 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 Dlt Manager. The main form area contains the following elements:

- Telemarketer Id:** A text input field containing '1702158948158427033' and a 'View Details' button.
- Organization Name:** A text input field containing 'MANUAL TM'.
- Registration Id:** A text input field containing '1702158948158427033'.
- Upload Document:** A section with a 'Choose File' button (labeled 'No file chosen') and a checkbox labeled 'I hereby authorize MANUAL TM for on-boarding with us on VMIPL DLT Panel as our Telemarketer partner.' (labeled 5).
- Submit Request:** A blue button (labeled 6).

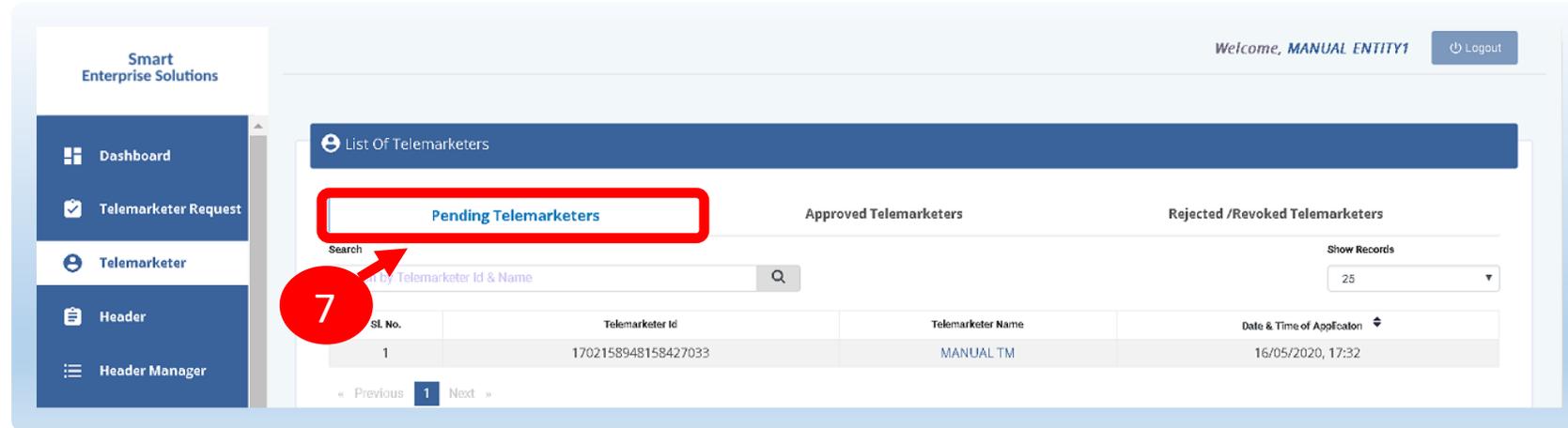
Red callouts and arrows indicate the steps:
 

- 4:** Points to the 'Choose File' button.
- 5:** Points to the authorization checkbox.
- 6:** Points to the 'Submit Request' button.

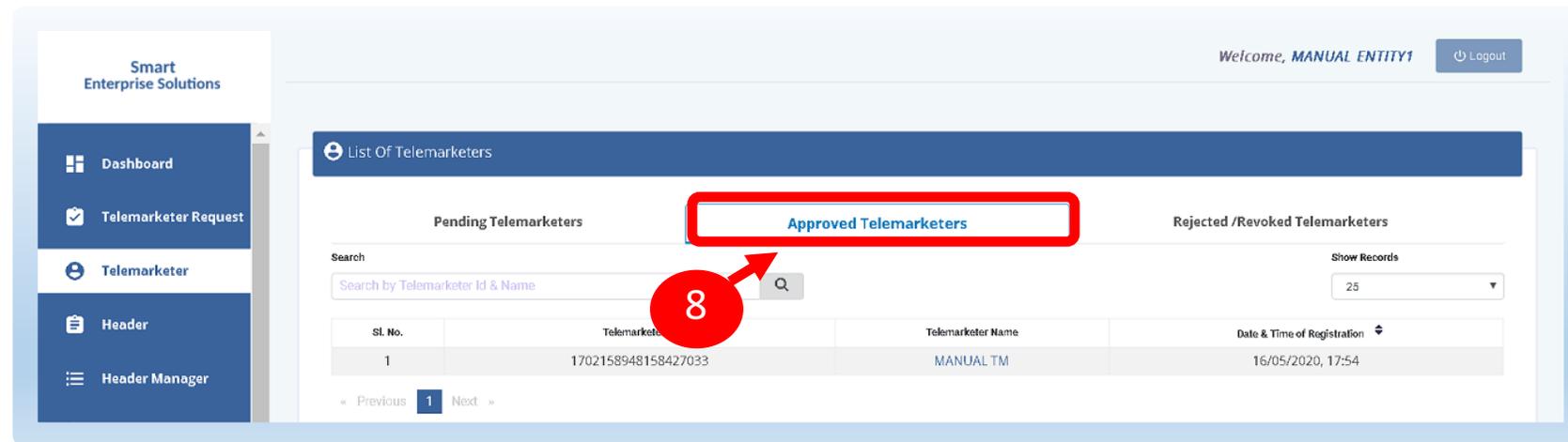
At the top right of the interface, it says 'Welcome, MANUAL ENTITY1' and has a 'Logout' button. At the bottom right, there is a copyright notice: 'Copyright©2019 Smart Enterprise Solutions, Powered by Blockcube'.

# TELEMARKETER REQUEST – REQUEST STATUS

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



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

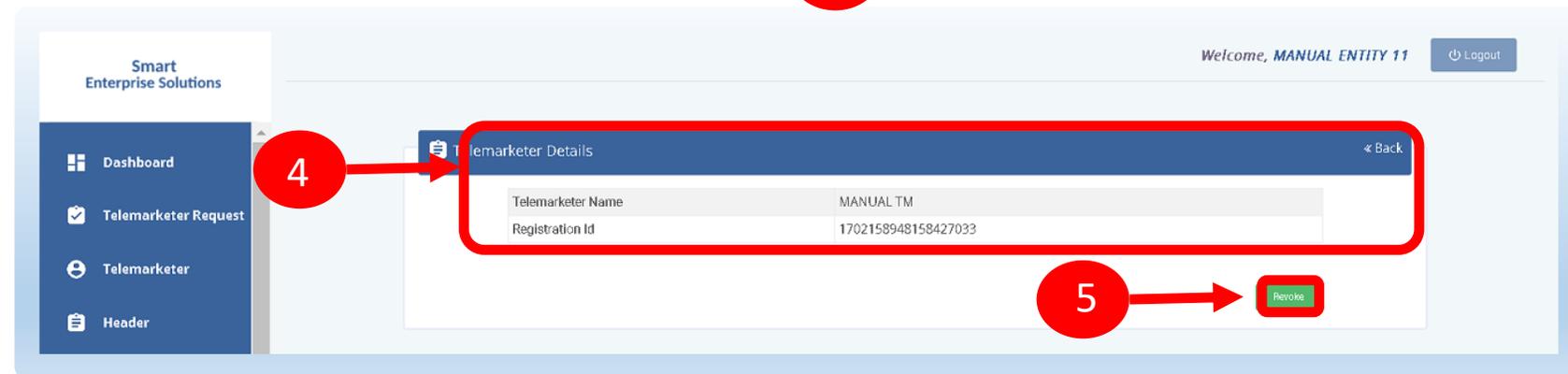
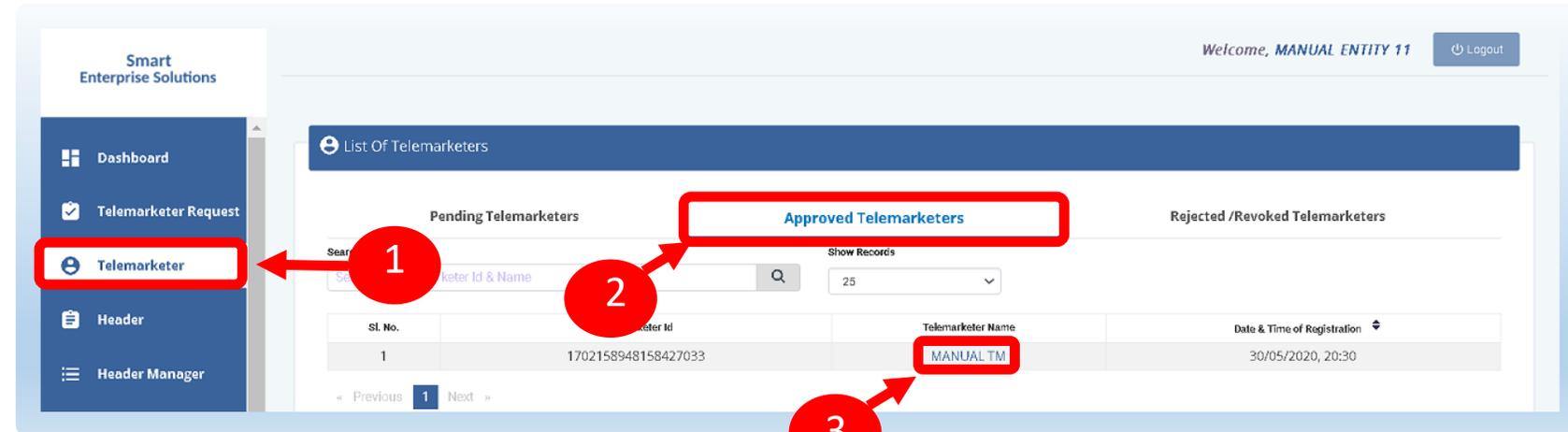


# ENTITY-TELEMARKETER REVOCAATION

# 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

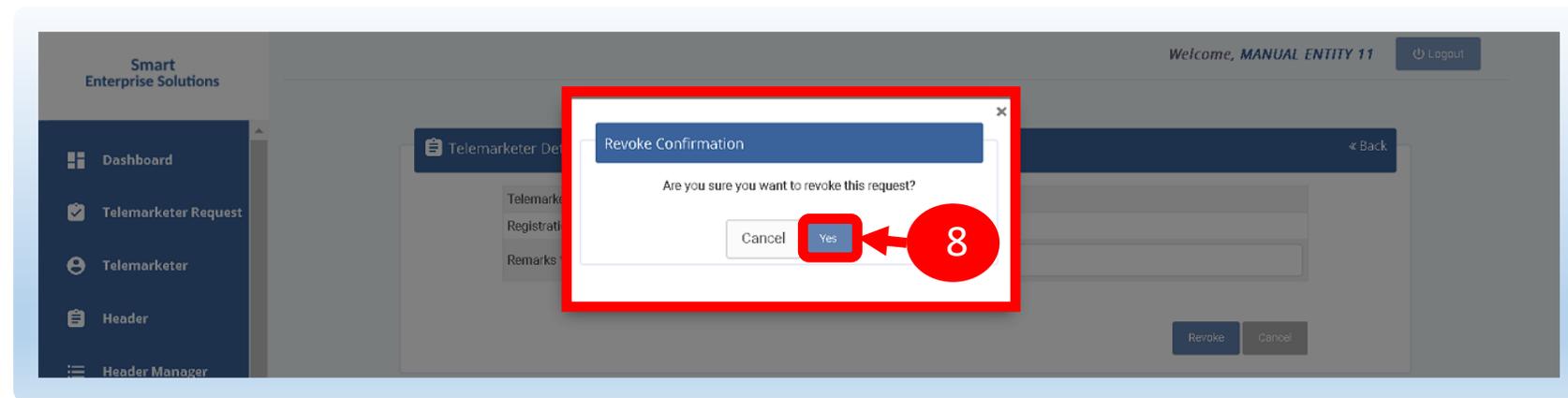
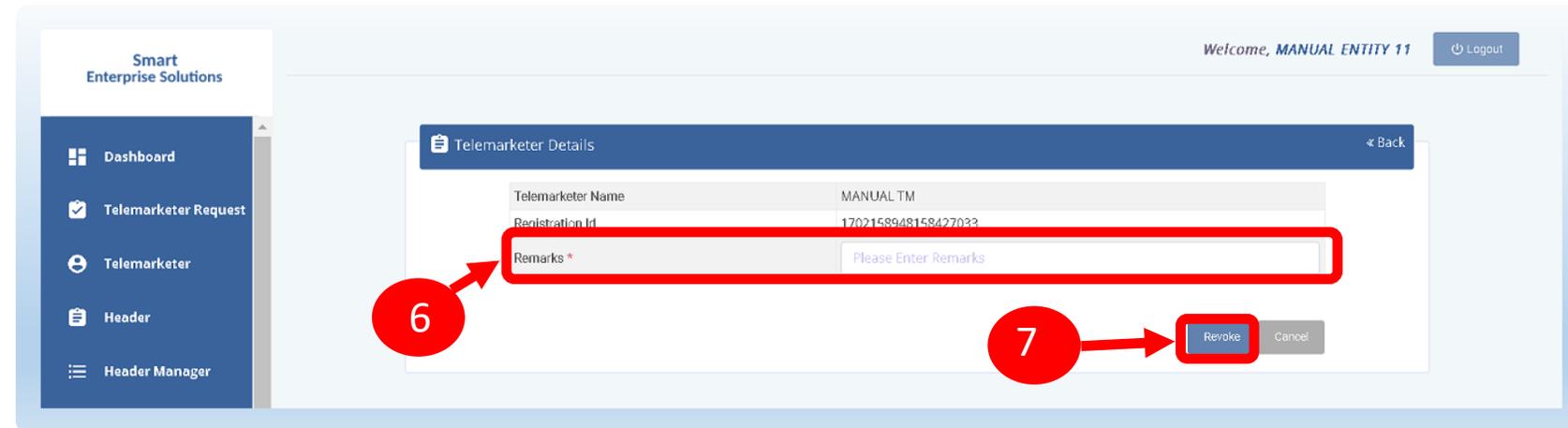
On clicking the Revoke button a page opens, provide the relevant **Remarks** for revocation.

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.



# 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.

Smart Enterprise Solutions

Welcome, MANUAL ENTITY 11 Logout

List Of Telemarketers

Pending Telemarketers      Approved Telemarketers      **Rejected /Revoked Telemarketers**

Search:       Status: **Revoked**      Show Records: 25

SL No.	Telemarketer Id	Telemarketer Name	Reason(s) For Revoked	Date & Time of Status Updated	Revoked By
1	1702158948158427033	MANUAL TM	test	30/05/2020, 20:45	Entity

« Previous 1 Next »

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# 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 New Single Header

The screenshot displays the 'Header' management interface. On the left, the navigation menu includes 'Header' (highlighted with a red box and arrow labeled '1'). The main area features a 'New Header' button (highlighted with a red box and arrow labeled '2'). Below this, there are filter tabs for 'Claimed Header Request', 'Headers', and 'Surrendered/ Withdrawn/ Rejected'. A search bar and dropdown menus for 'Header Type', 'Status', and 'Show Records' are present. A table with columns like 'Sl. No.', 'Telemarketer Id', 'Header Name', 'Header Type', 'Date & Time of Application', 'Date & Time of Status Updated', and 'Status' is shown below, but it contains 'Oops! No Data Found'.

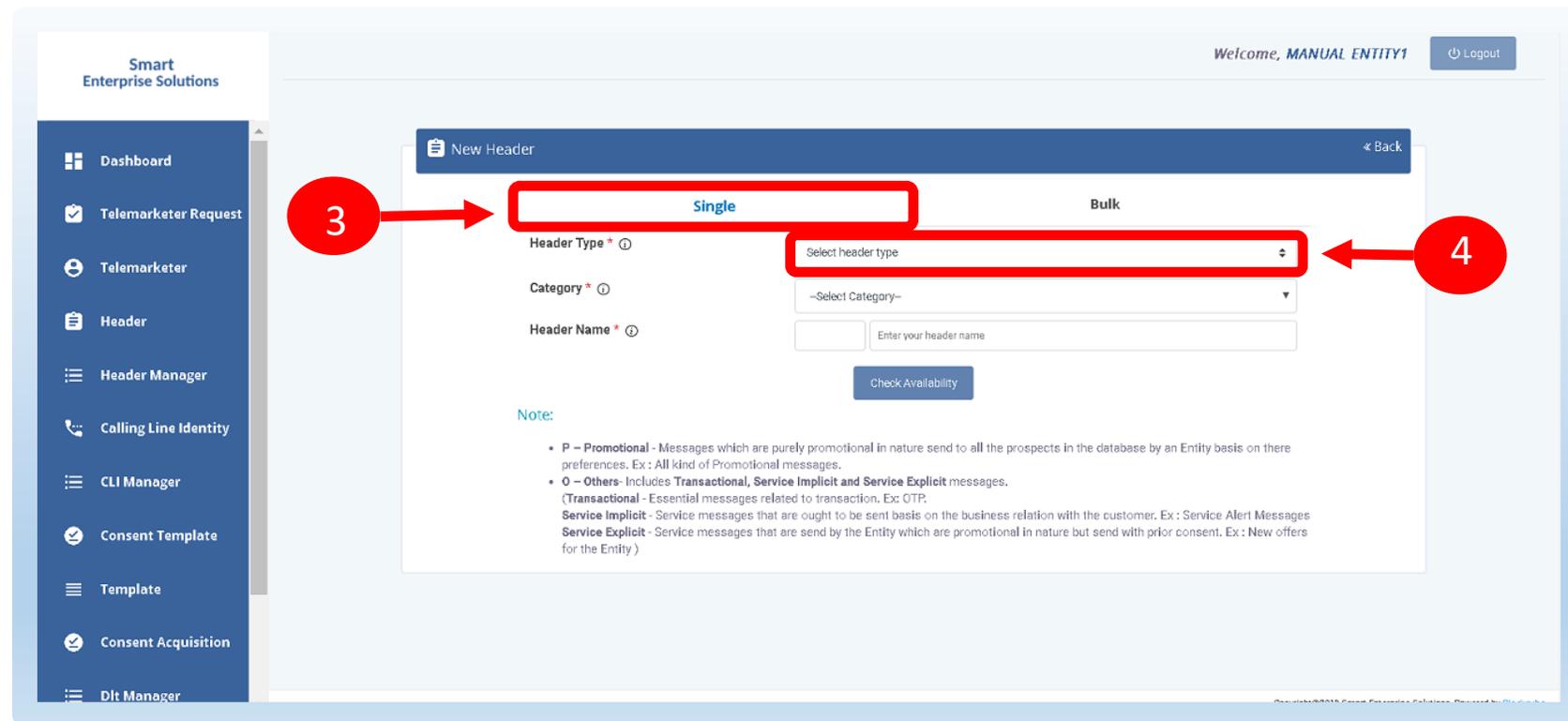
# HEADER CREATION – SELECTION OF HEADER TYPE

**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)*



**NOTE :** In case of Government Entites, there will be Header Exemption option (If slected 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 'New Header' form in the Smart Enterprise Solutions interface. The 'Category' dropdown menu is highlighted with a red box, and a red arrow points to it from a red circle containing the number '5'. The form includes the following fields and elements:

- Header Type \***: A dropdown menu with 'Single' and 'Bulk' options.
- Header Type \***: A dropdown menu with 'Select header type' as the current selection.
- Category \***: A dropdown menu with '-Select Category-' as the current selection.
- Header Name \***: A text input field with the placeholder 'Enter your header name'.
- Check Availability**: A button to check the availability of the header.
- Note:**
  - 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 - 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

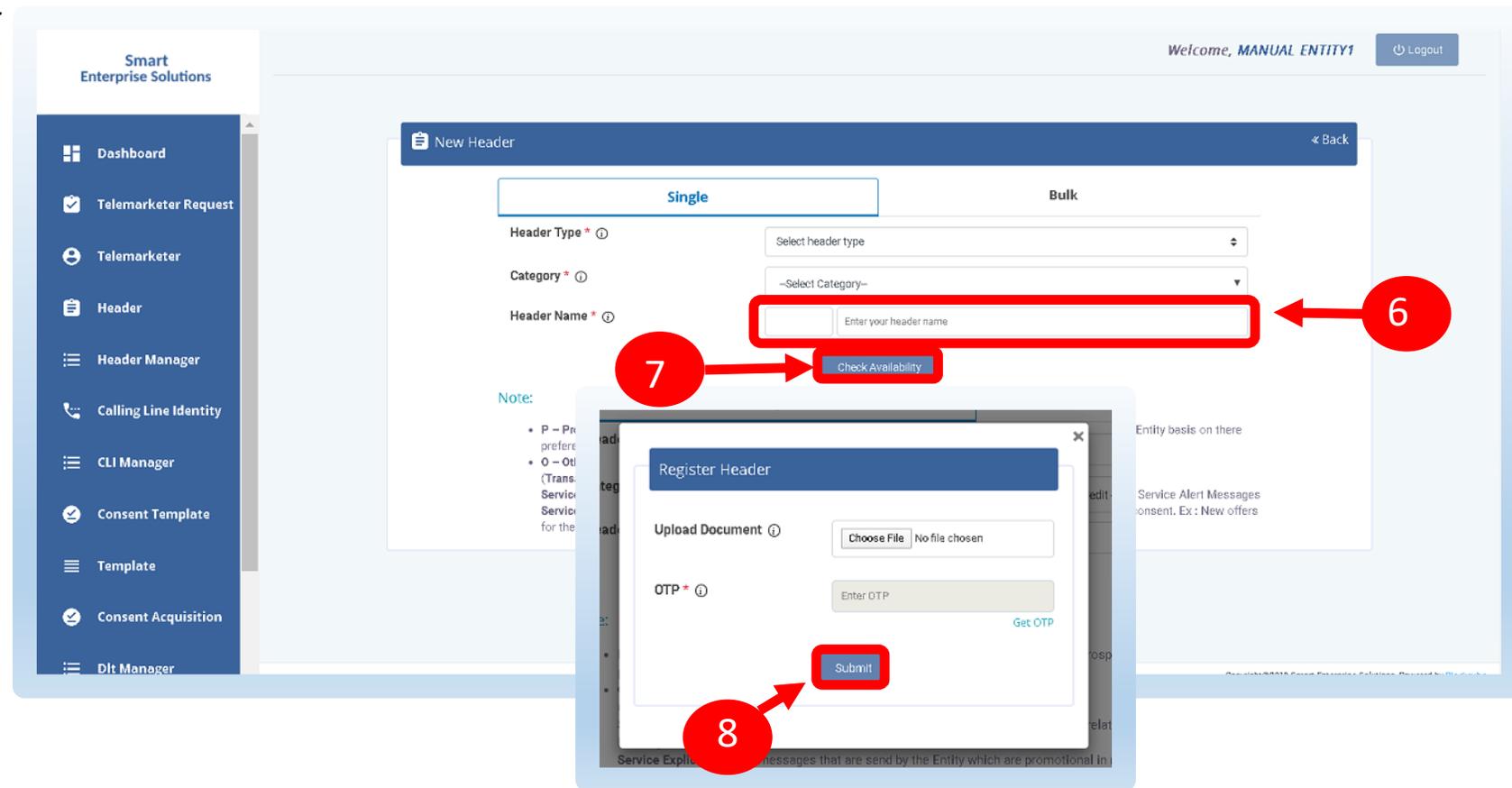
**6** Type in the desired **Header Name** according to your Header Type/Brand Name or business requirement.

*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.*

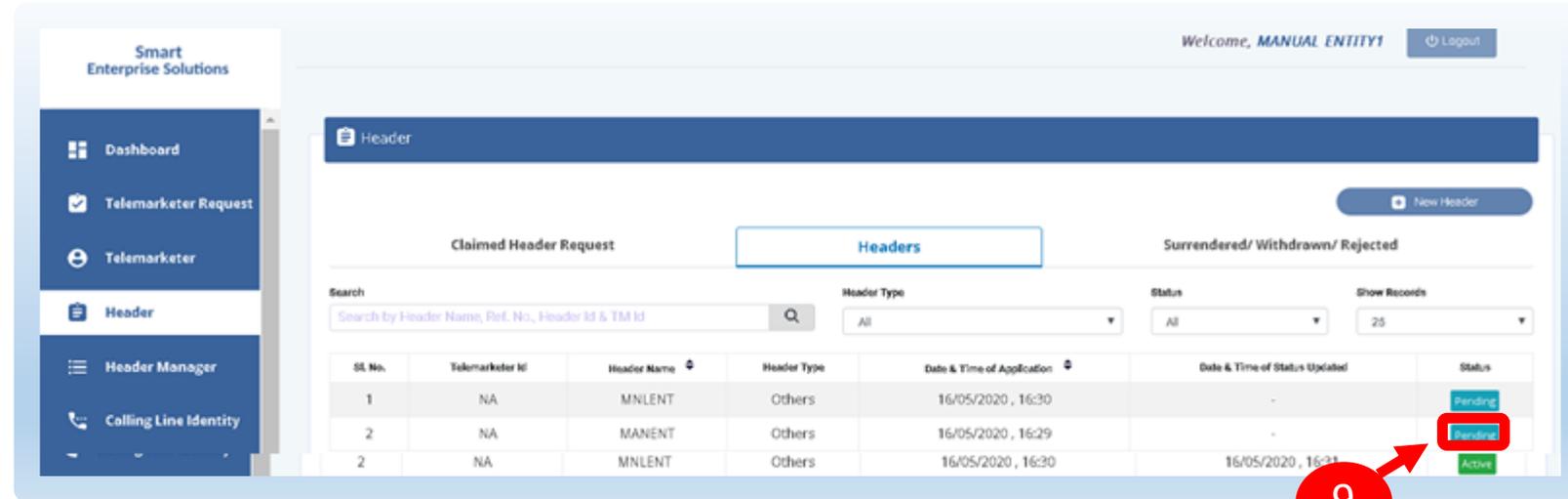
**7** Click **Check Availability** to check the availability of header name. If available proceed with next step. If not available follow the claim process.

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

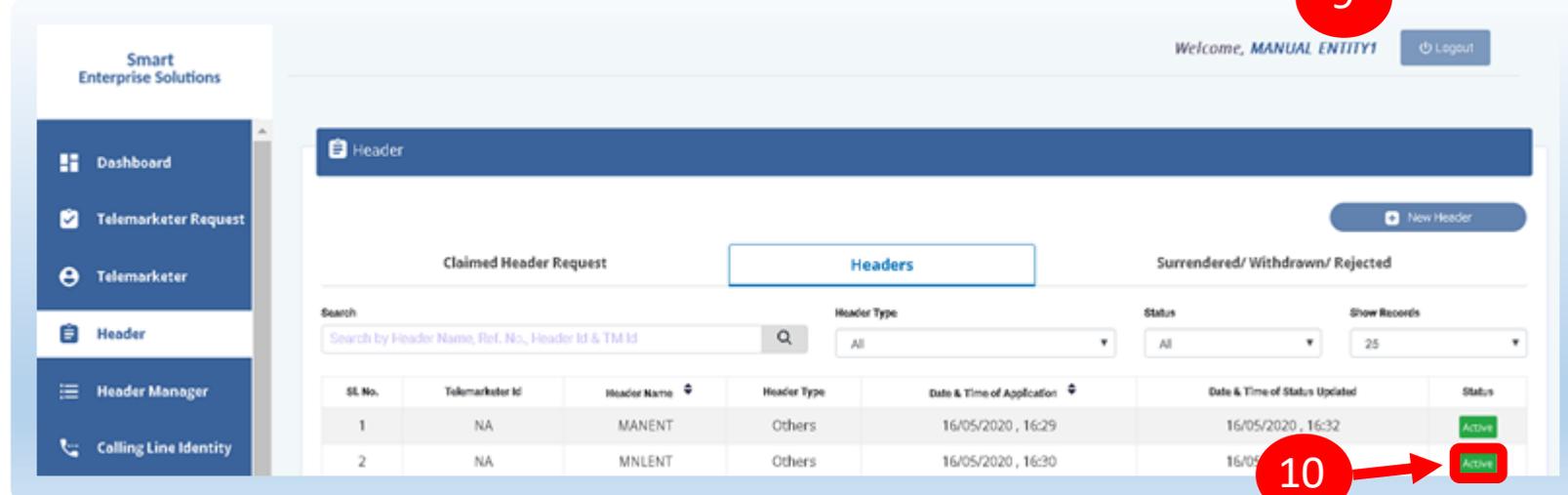


# HEADER CREATION – HEADER STATUS

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



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



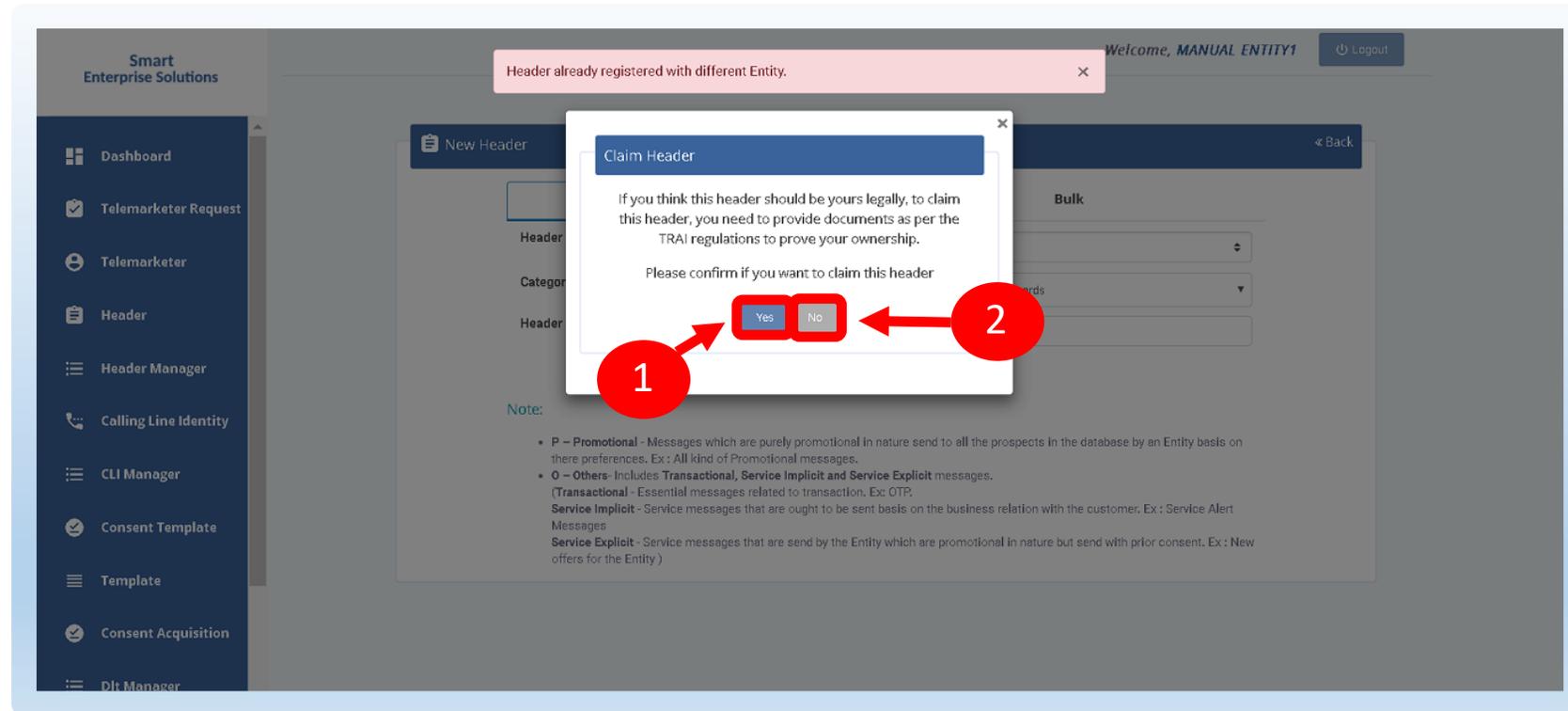
# CLAIM HEADER

# 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



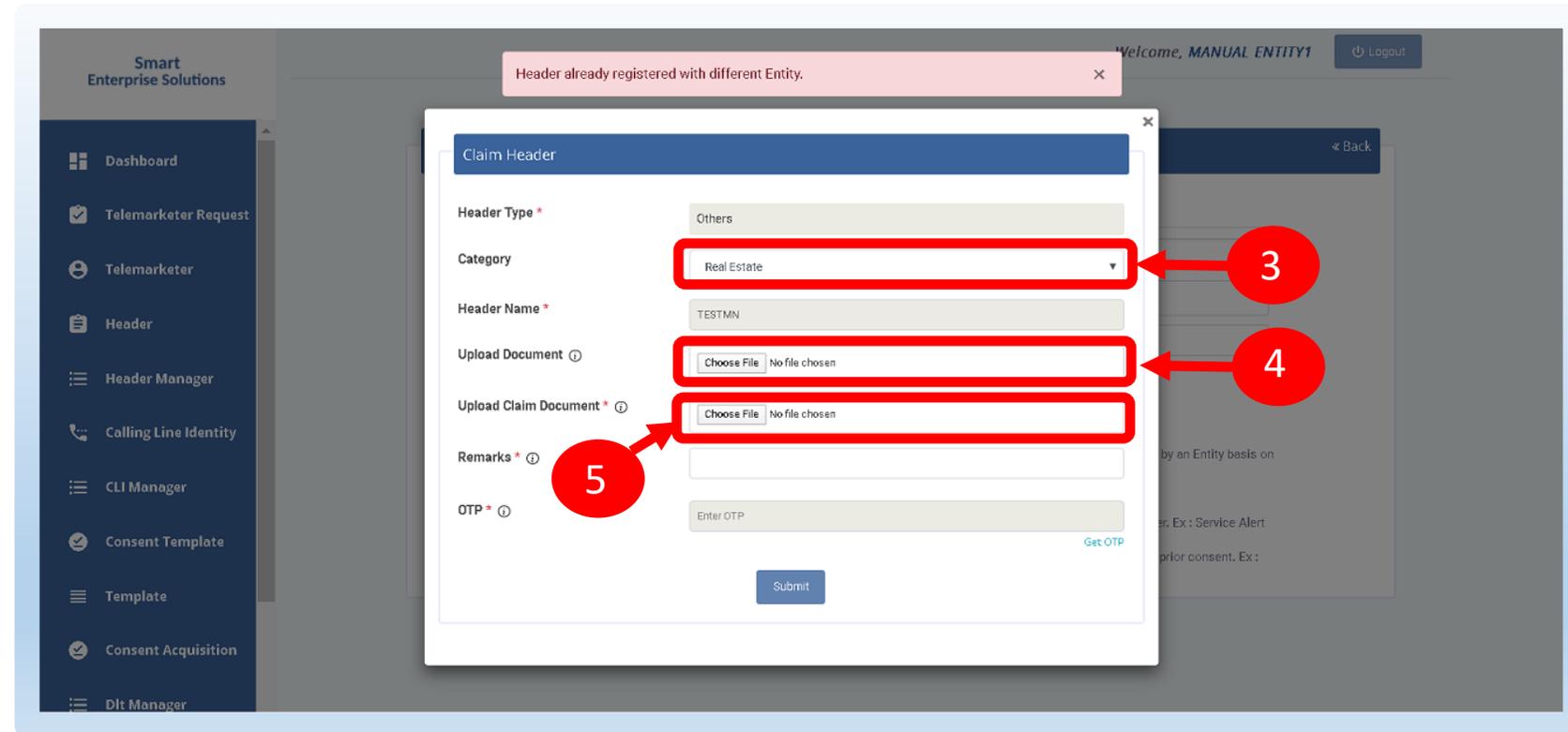
# CLAIM HEADER – CATEGORY SELECTION / DOCUMENT UPLOAD

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.



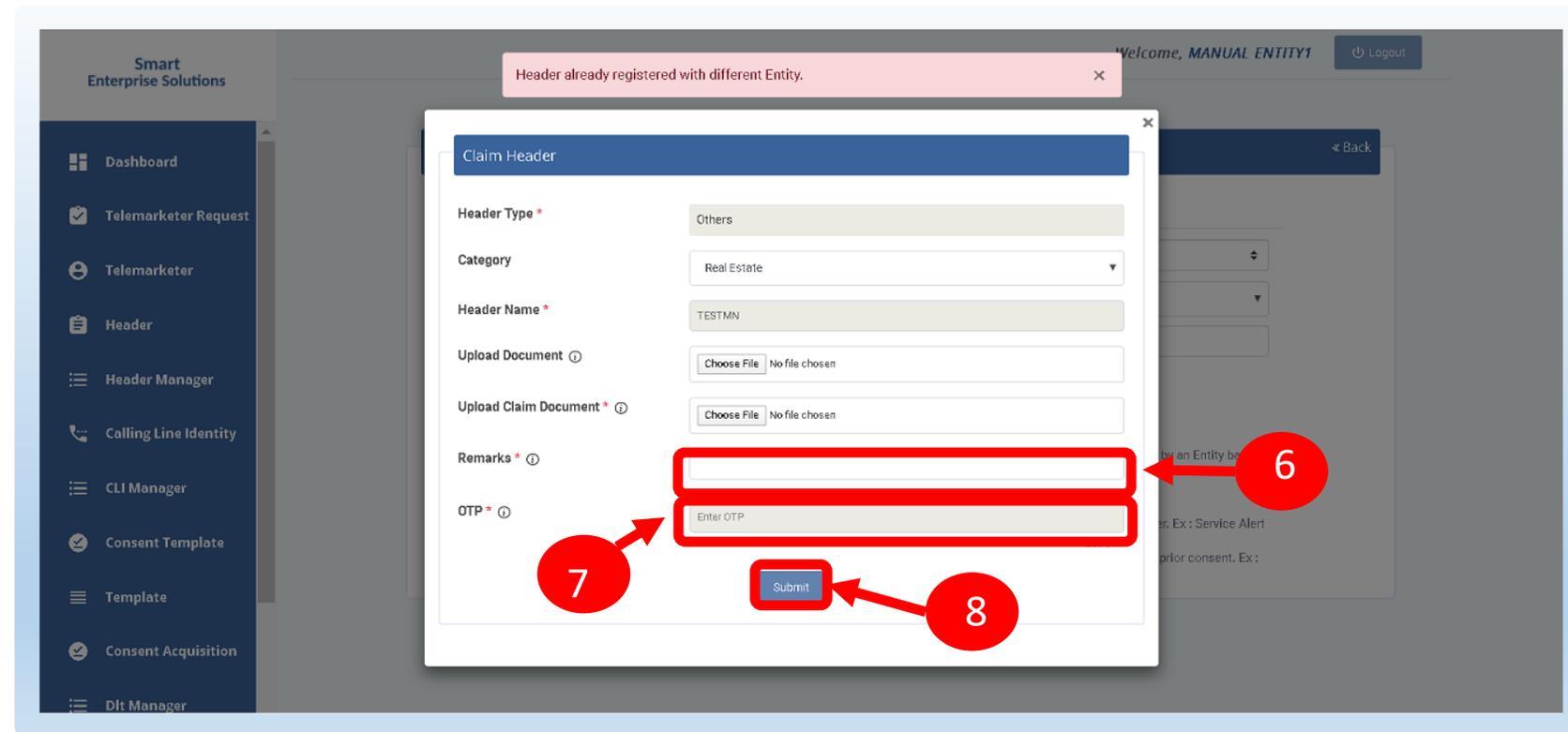
**NOTE :** In case of Government Entities, there will be Header Exemption option (If selected you will have to upload verification document)

# 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.



# 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**.

Smart Enterprise Solutions

Welcome, MANUAL ENTITY1 Logout

Header

Claimed Header Request

New Header

Surrendered/ Withdrawn/ Rejected

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	TESTMN	Others	16/05/2020, 16:52	-	Pending

Previous 1 Next

Smart Enterprise Solutions

Welcome, MANUAL ENTITY1 Logout

Header

Claimed Header Request

Headers

Surrendered/ Withdrawn/ Rejected

New Header

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	TESTMN	Others	16/05/2020, 16:52	16/05/2020, 16:52	Active

Previous 1 Next

# HEADER – SURRENDER

# HEADER SURRENDER – INITIATION

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

1

Click **Active** to surrenderthe header.

2

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

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Welcome, MANUAL ENTITY1 [Logout](#)

Header

New Header

Claimed Header Request Headers Surrendered/ Withdrawn/ Rejected

Search  Header Type: All Status: All Show Records: 25

Sl. No.	Telemarketer Id	Header Name	Header Type	Date & Time of Application	Date & Time of Status Updated	Status
1	NA	MANENT	Others	16/05/2020 , 16:29	16/05/2020 , 16:32	Active
2	NA	MNLENT	Others	16/05/2020 , 16:30	16/05/2020 , 16:31	Active

Header details

Reference Number: 05-QKKA9IS5MM

Header Id: 1705158962684761478

Category: Banking/Insurance/Financial products/ credit cards

Remarks: -

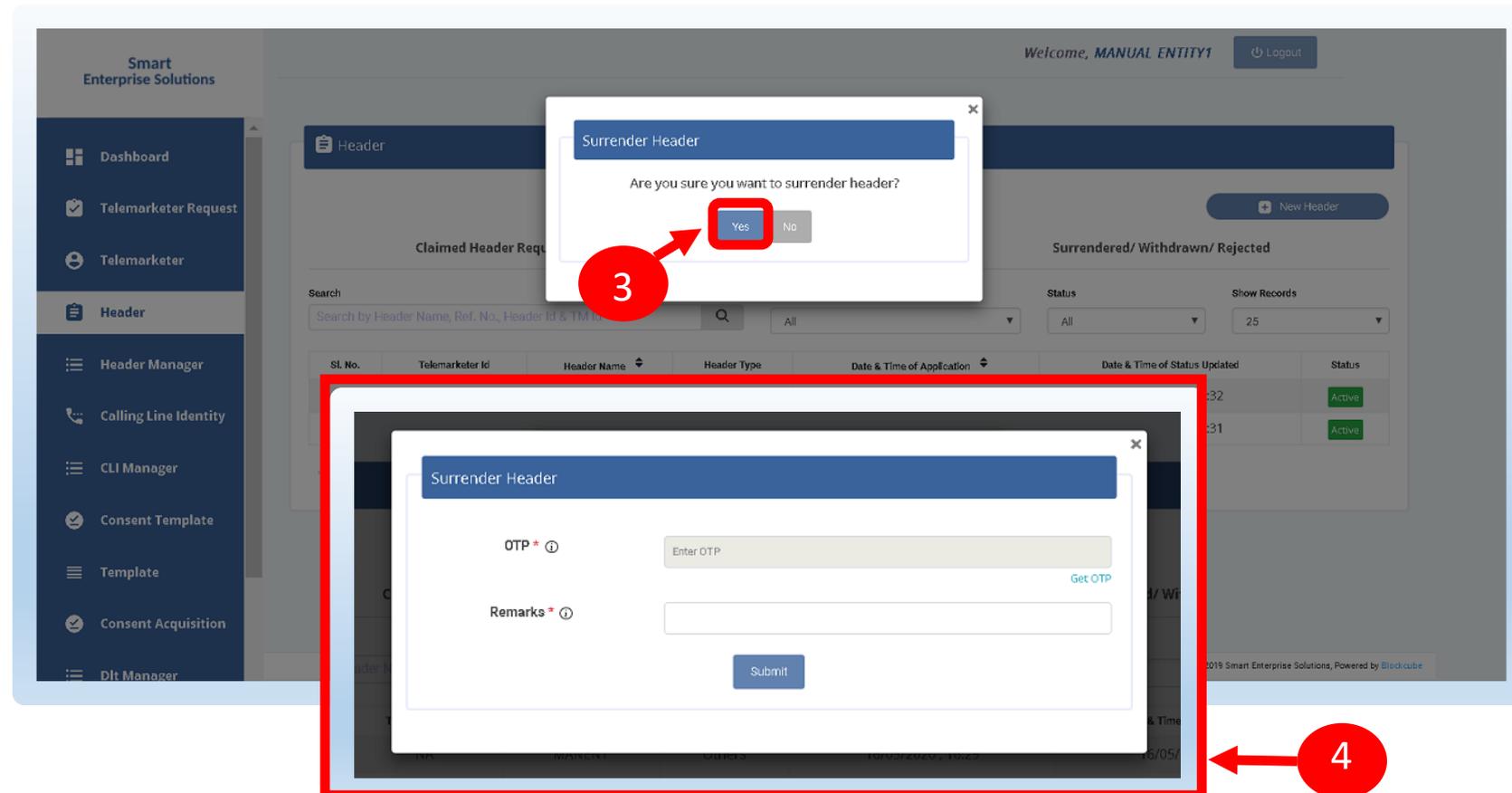
Surrender

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# 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' management interface. The left sidebar contains navigation options: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, and DI: Manager. The main content area has a top bar with 'Header' and a 'New Header' button. Below this are three tabs: 'Claimed Header Request', 'Headers', and 'Surrendered/Withdrawn/Rejected' (which is selected). A search bar and filters for 'Header Type', 'Status', and 'Show Records' are present. A table displays header entries with columns: SL No., Telemarketer Id, Header Name, Header Type, Date & Time of Application, Date & Time of Status Updated, and Status. The first row shows a header with SL No. 1, Telemarketer Id NA, Header Name MNLENT, Header Type Others, Date & Time of Application 16/05/2020, 16:30, and Status Surrendered. A red circle with the number '5' and an arrow points to the 'Surrendered' status cell. The bottom right corner of the interface contains the text: 'Copyright©2019 Smart Enterprise Solutions, Powered by Blockcube'.

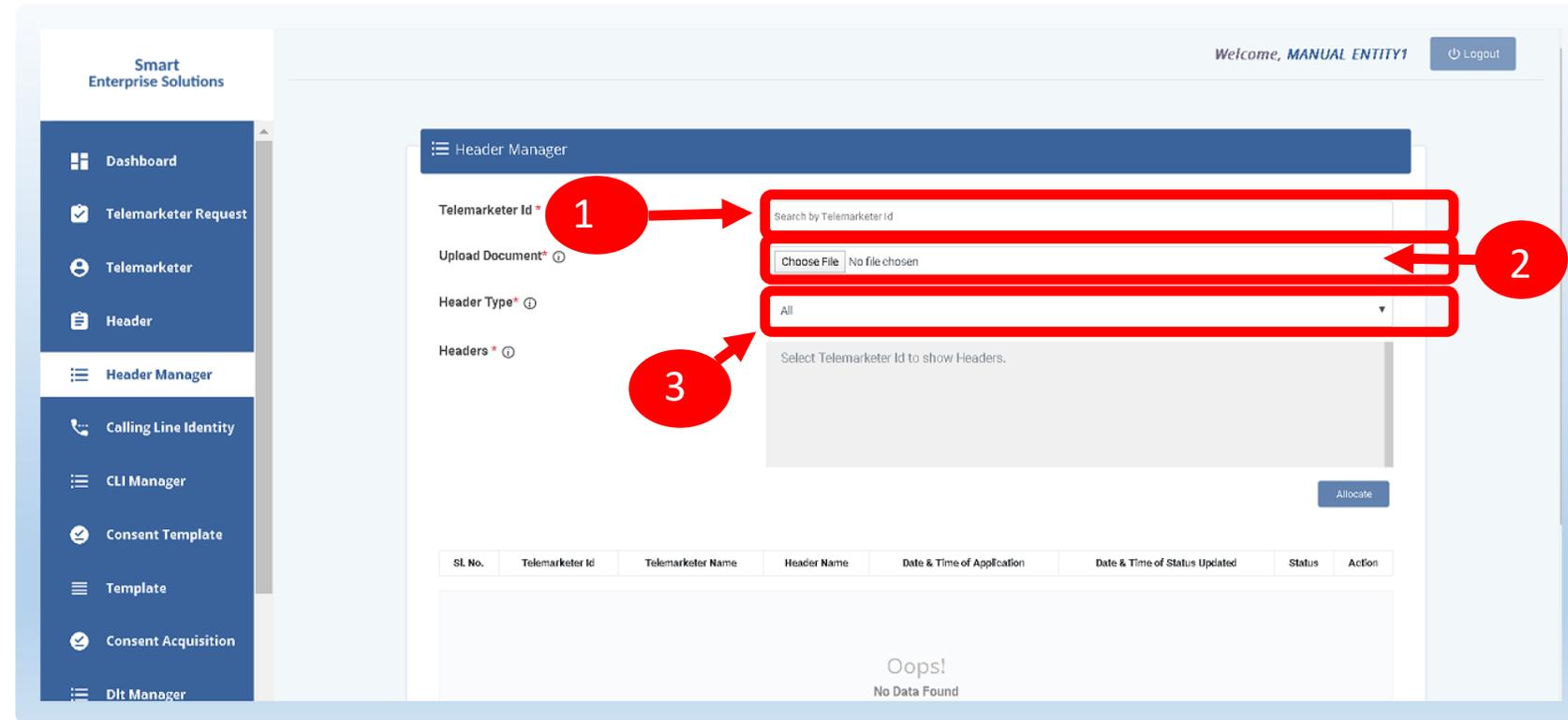
# HEADER MANAGER

*(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



# 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.

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Welcome, MANUAL ENTITY1 [Logout](#)

Header Manager

Telemarketer Id \*

Upload Document\*  No file chosen

Header Type\*

Headers \*

Sl. No.	Telemarketer Id	Telemarketer Name	Header Name	Date & Time of Application	Date & Time of Status Updated	Status	Action
1	1702158948158427033	MANUAL TM	MANENT	16/05/2020 , 17:59	16/05/2020 , 17:59	Pending	

# HEADER MANAGER – REVOCATION OF ALLOTTED 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 displays the 'Header Manager' interface. On the left is a sidebar with navigation items: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, and Dlt Manager. The main content area shows a form for adding headers and a table of existing headers. A modal dialog titled 'Header Revoke Confirmation' is open, asking for confirmation to revoke a header. The 'Yes' button in the dialog is highlighted with a red circle and arrow labeled '7'. The 'Revoke' button in the table is highlighted with a red circle and arrow labeled '8'. The 'Revoked' status in the table is highlighted with a red circle and arrow labeled '9'.

Sl. No.	Telemarketer Id	Telemarketer Name	Header Name	Date & Time of Application	Date & Time of Status Updated	Status	Action
1	1702158948158427033	MANUAL TM	MANENT	16/05/2020 , 17:59	16/05/2020 , 20:18	Active	Revoke
1	1702158948158427033	MANUAL TM	MANENT	16/05/2020 , 17:59	16/05/2020 , 20:21	Revoked	

# 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.

The screenshot displays the 'Consent Template' management page in the Smart Enterprise Solutions application. On the left sidebar, the 'Consent Template' menu item is highlighted with a red box and a red circle containing the number '2'. In the main content area, the 'Add New Consent Template' button is highlighted with a red box and a red circle containing the number '1'. The page includes a search bar, a status dropdown menu set to 'All', and a 'Show Records' dropdown menu set to '25'. Below these elements is a table with the following columns: SL No., Consent Template Name, SMS/ Call Template, Brand Name, Date & Time of Application, Date & Time of Status Updated, and Status. The table is currently empty, displaying 'Oops! No Data Found'.

# 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.

The screenshot shows the 'Add Consent Template' form in the Smart Enterprise Solutions interface. The form is titled 'Add Consent Template' and has a 'Single' mode indicator. It includes the following fields and buttons:

- Consent Template Name\***: A text input field with a placeholder 'Enter Template Name'. A red circle with the number 3 points to this field.
- Brand Name\***: A text input field with a placeholder 'MANUAL ENTITY1'. A red circle with the number 4 points to this field.
- Create New Message**: A section containing a 'Message:' label and a text input field with a placeholder 'Enter the message'. A red circle with the number 5 points to this section.
- OTP\***: A text input field with a placeholder 'Enter OTP'. A red circle with the number 6 points to this field.
- Get OTP**: A button located below the OTP field. A red circle with the number 6 points to this button.
- Submit**: A button located at the bottom right of the form. A red circle with the number 7 points to this button.

# 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. At the top right, there is a button '+ Add New Consent Template'. Below this is a search section with a text input 'Search by Consent Template Name & Consent Id', a search icon, a 'Status' dropdown menu set to 'All', and a 'Show Records' dropdown menu set to '25'. The main content is a table with the following data:

Sl. No.	Consent Template Name	SMS/ Call Template	Brand Name	Date & Time of Application	Date & Time of Status Updated	Status
1	TEST TEMPLATE	DEAR PATRON , WE WIS... <a href="#">read more</a>	MANUAL ENTITY1	16/05/2020 , 21:27	-	Pending

At the bottom of the table, there are navigation links: « Previous 1 Next ». A red circle with the number '8' and an arrow points to the 'Pending' status cell in the table.

9

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

This screenshot is identical to the one above, but the status of the template has changed. The 'Status' column now displays 'Active' in a green box. Additionally, the 'Date & Time of Status Updated' column now shows '16/05/2020 , 21:28'. A red circle with the number '9' and an arrow points to the 'Active' status cell.

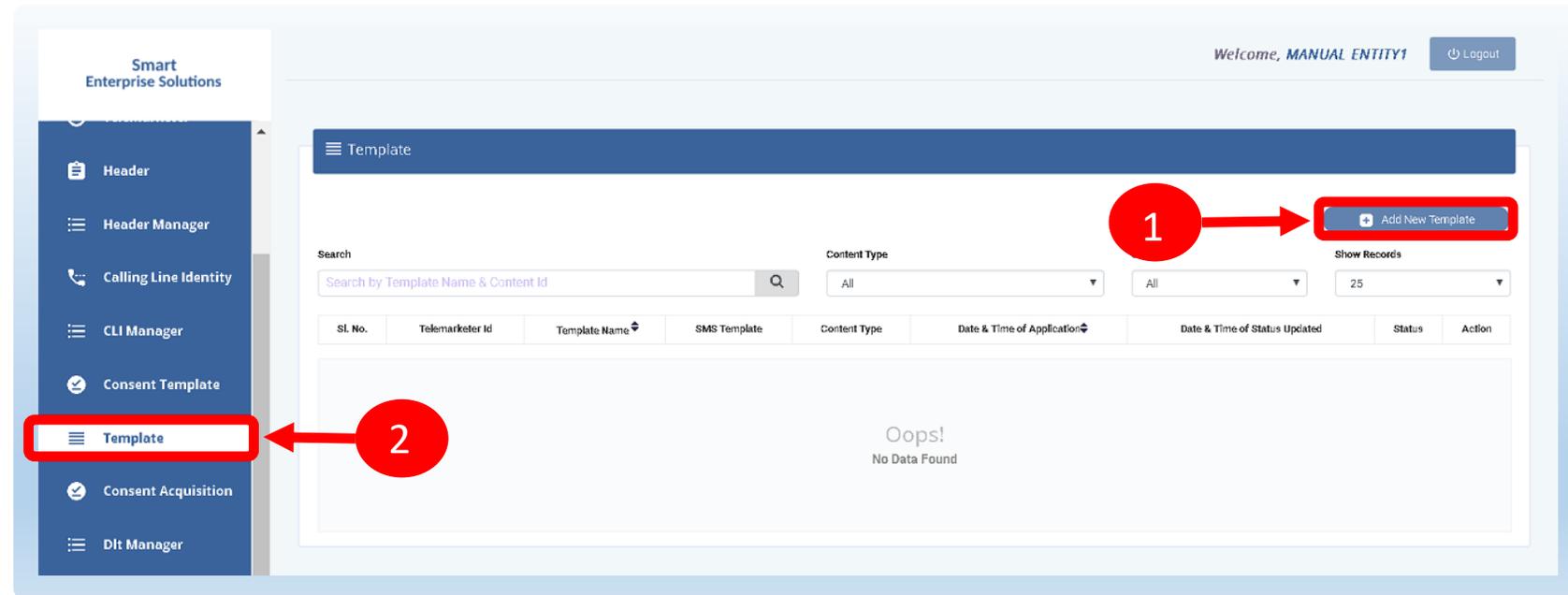
# TEMPLATE (CONTENT)

# 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' form in the Smart Enterprise Solutions interface. The form is titled 'Add Template' and has a 'Back' button. The form is divided into several sections:

- 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.
- Content Type:** A dropdown menu with a red circle '5' and an arrow pointing to it.
- Consent Template ID:** A dropdown menu with a red circle '5' and an arrow pointing to it.
- Content Category:** A dropdown menu.
- Template Type:** A dropdown menu.
- Copy/Paste Message / Create New Message (Type):** A section with a 'Message:' label and a 'Total Count: 0' indicator.
- OTP:** A text input field with a red circle '5' and an arrow pointing to it.

The form also includes a 'Submit' button at the bottom.

# 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' form in the Smart Enterprise Solutions interface. The form includes the following fields and callouts:

- 6**: Points to the 'Consent Template ID' dropdown menu.
- 7**: Points to the 'Consent template registered?' link next to the 'Consent Template ID' dropdown.
- 8**: Points to the 'Content Category' dropdown menu.
- 9**: Points to the 'Template Type' dropdown menu, which currently shows 'Text'.

Other visible form elements include: 'Template Name', 'Communication Type', 'Content Type', 'Message' editor, 'OTP' field, and a 'Submit' button. The interface also shows a sidebar menu on the left and a 'Welcome, MANUAL ENTITY!' message at the top right.

# TEMPLATE – CREATION OF CONTENT

In the Content creation section there are two options available:

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

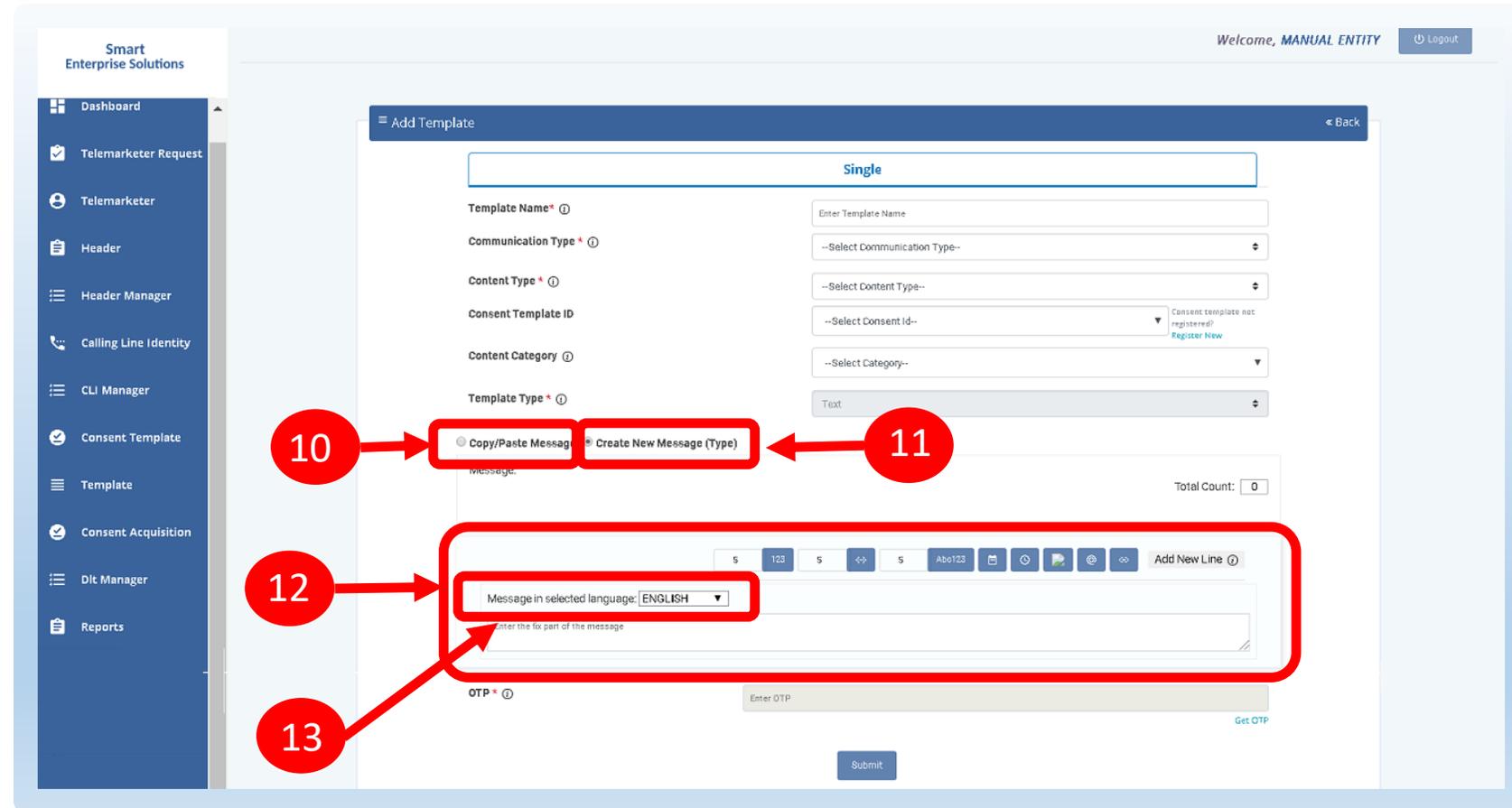
Select any of the option basis on the requirement of content creation.

**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' interface in the Smart Enterprise Solutions system. The left sidebar contains a navigation menu with items: Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, Reports, and Profile. The main content area is titled 'Add Template' and includes a 'Back' link. The form fields are as follows:

- Template Name\***: Text input field with placeholder 'Enter Template Name'.
- Communication Type\***: Dropdown menu with '-Select Communication Type-'.
- Content Type\***: Dropdown menu with 'Select Content Type'.
- Consent Template ID**: Dropdown menu with '-Select Consent Id-' and a link for 'Consent template not registered? Register New'.
- Content Category**: Dropdown menu with '-Select Category-'.
- Template Type\***: Dropdown menu with 'Text'.
- Message Creation**: Radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)'.
- Message:**: A rich text editor area with a 'Total Count: 0' indicator and an 'Add New Line' button.
- OTP\***: Text input field with placeholder 'Enter OTP'.

Annotations for the steps:

- A red circle with the number '14' has an arrow pointing to the 'Get OTP' button located at the bottom right of the form.
- A red circle with the number '15' has an arrow pointing to the 'Submit' button located at the bottom center of the form.

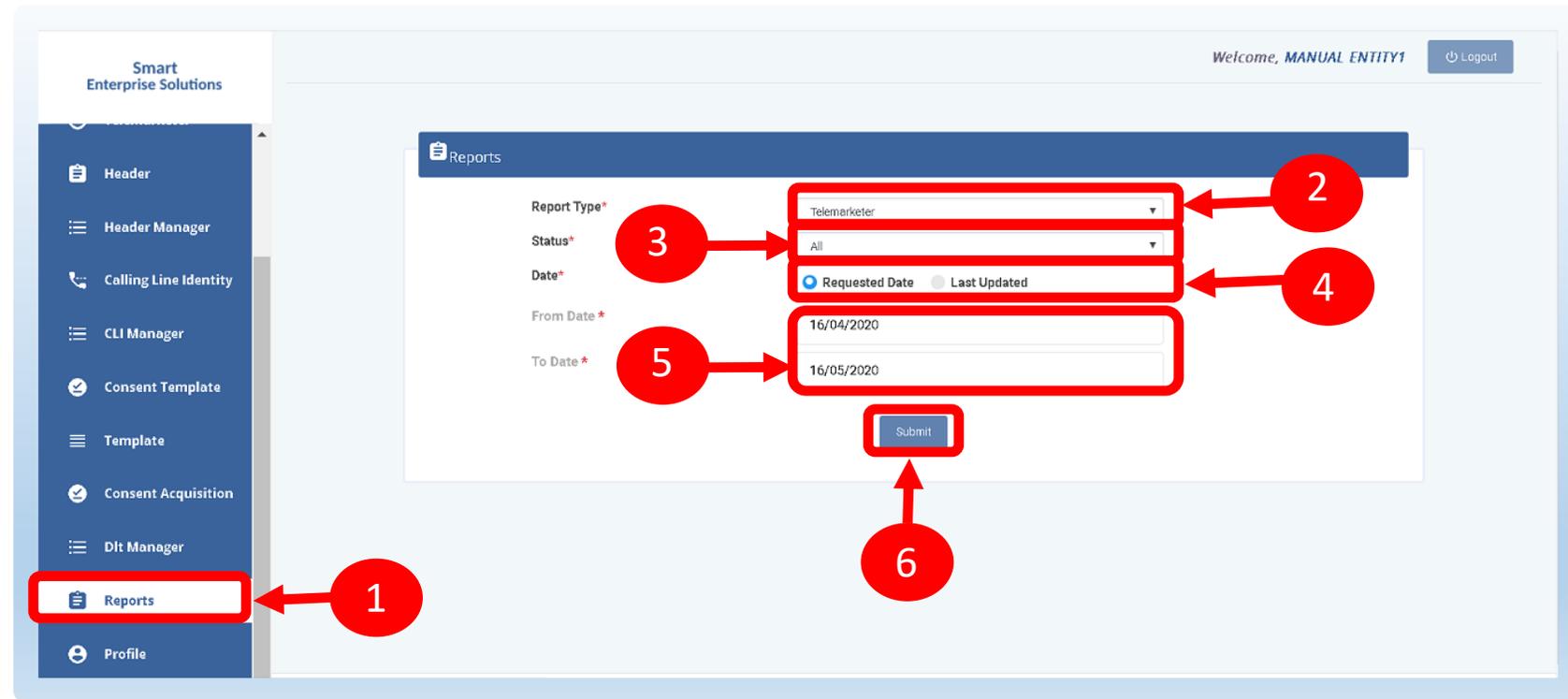
14

15

# 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.



# 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 'Smart Enterprise Solutions' interface. On the left is a sidebar with various menu items. The 'Profile' item at the bottom is highlighted with a red box and a red circle containing the number '1'. The main content area displays the 'Profile' details for 'MANUAL ENTITY'. An 'Edit' button is highlighted with a red box and a red circle containing the number '2'. At the bottom of the profile details, there is a 'click here' link, which is also highlighted with a red box and a red circle containing the number '3'. The top right of the page shows 'Welcome, MANUAL ENTITY' and a 'Logout' button.

Registration Type	Principal Entity
Organization Name	MANUAL ENTITY
Registration Id	1701158948025016158
Category of Organisation	Banking/Insurance/Financial products/ credit cards
Entity Type	Government
Approved By	VM
Registered Mobile Number	9702359704
Date & Time of Application	14/05/2020 , 23:47
Date & Time of Registration	15/05/2020 , 00:00
Registered E-mail Id	manualentity@yopmail.com
Registered Telemarketer	1. MANUAL TM
Status	Active
<b>AUTHORISED PERSON INFORMATION</b>	
Name	XXXXXXXX
E-mail Id	manager@yopmail.com
Mobile No.	XXXXXXXX
Designation	Manager
Registration Certificate Number	1701158948025016158

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

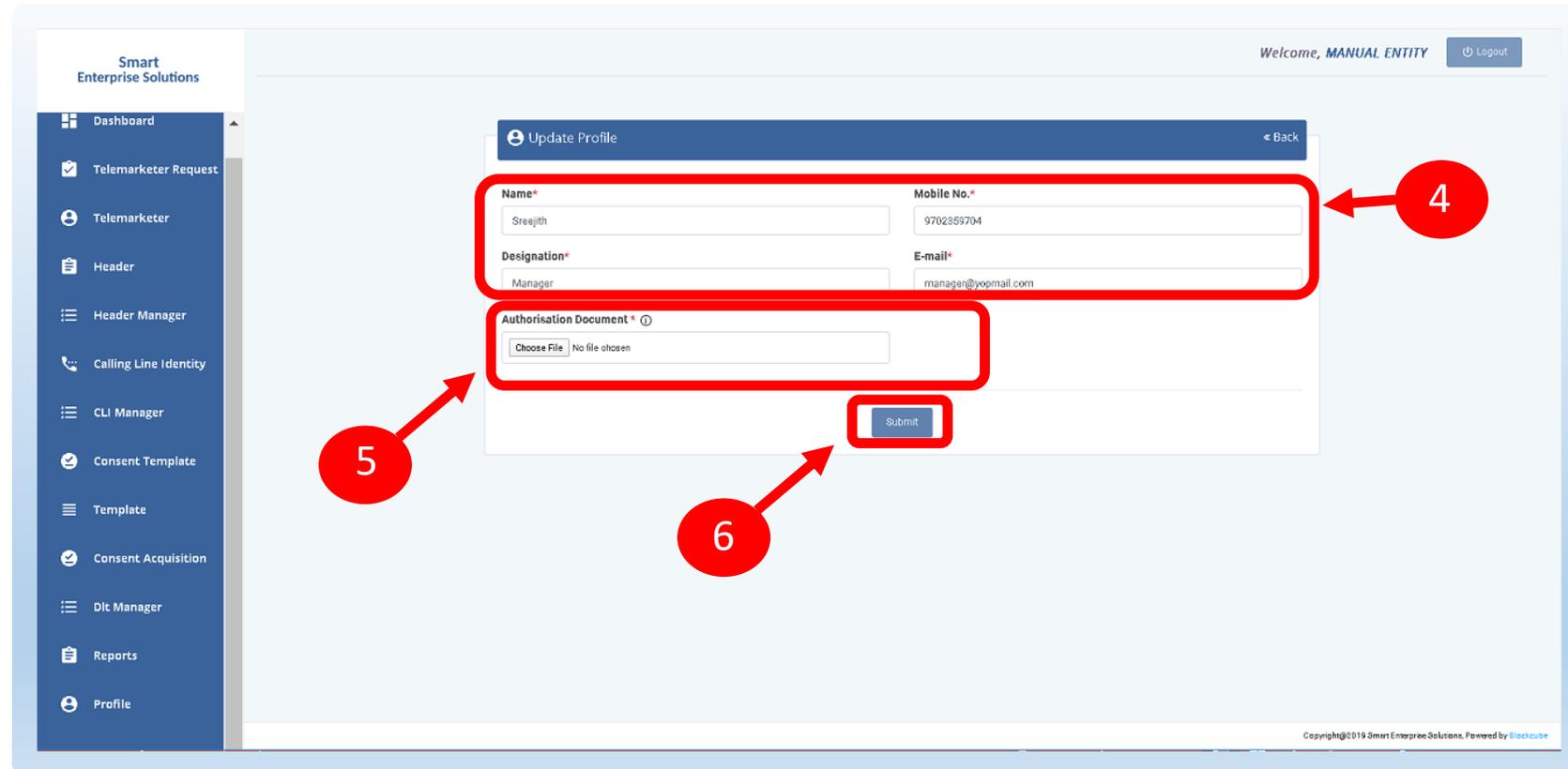
# PROFILE UPDATE PAGE

**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.



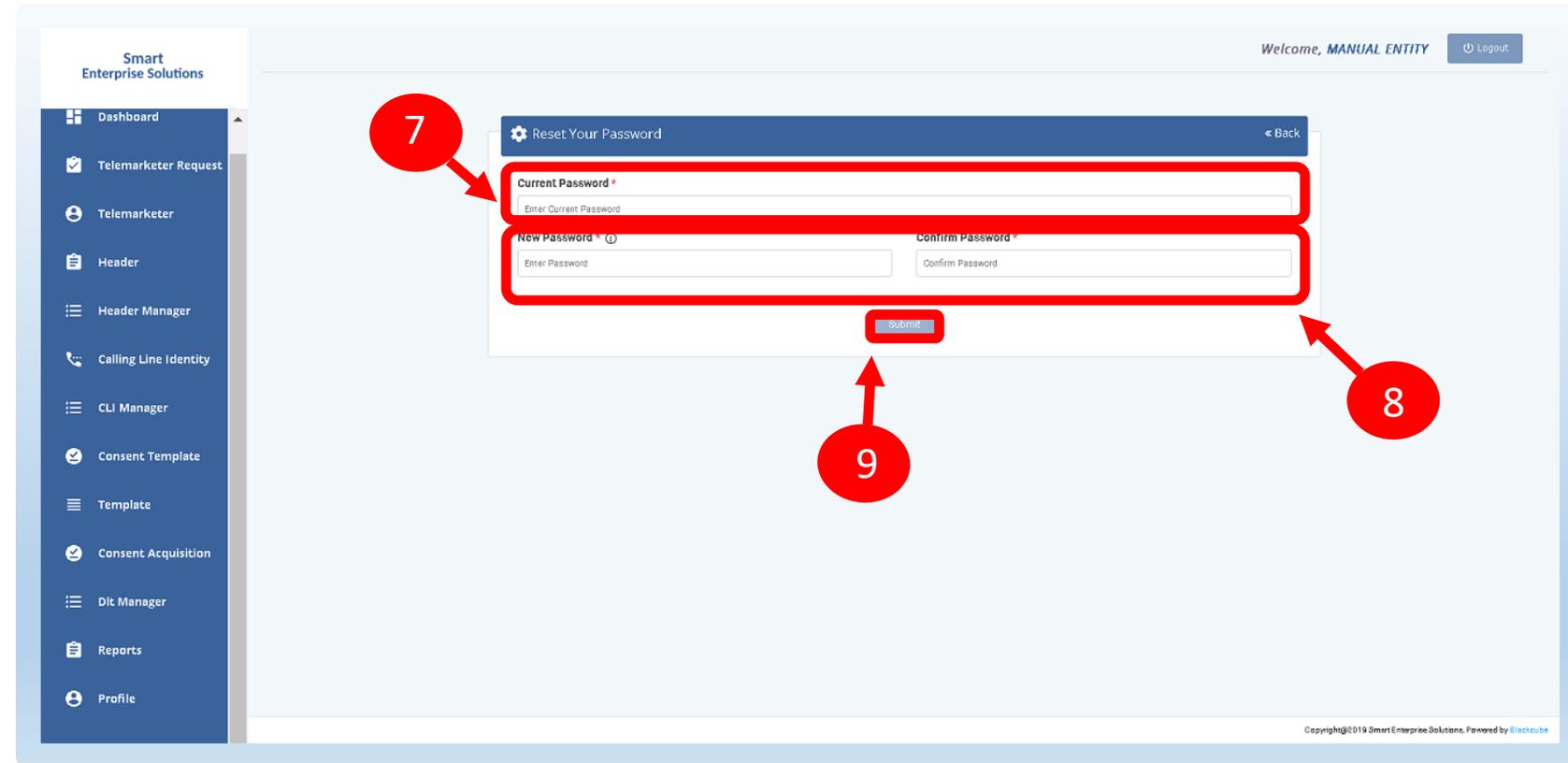
# PROFILE – CHANGE PASSWORD

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 !