Welcome to Connect Enterprise Solutions

USER MANUAL

ENTITY

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USER FUNCTIONALITY PAGE #

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USER FUNCTIONALITY PAGE #

WEBSITE / LANDING PAGE

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

Incorrect URL: 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

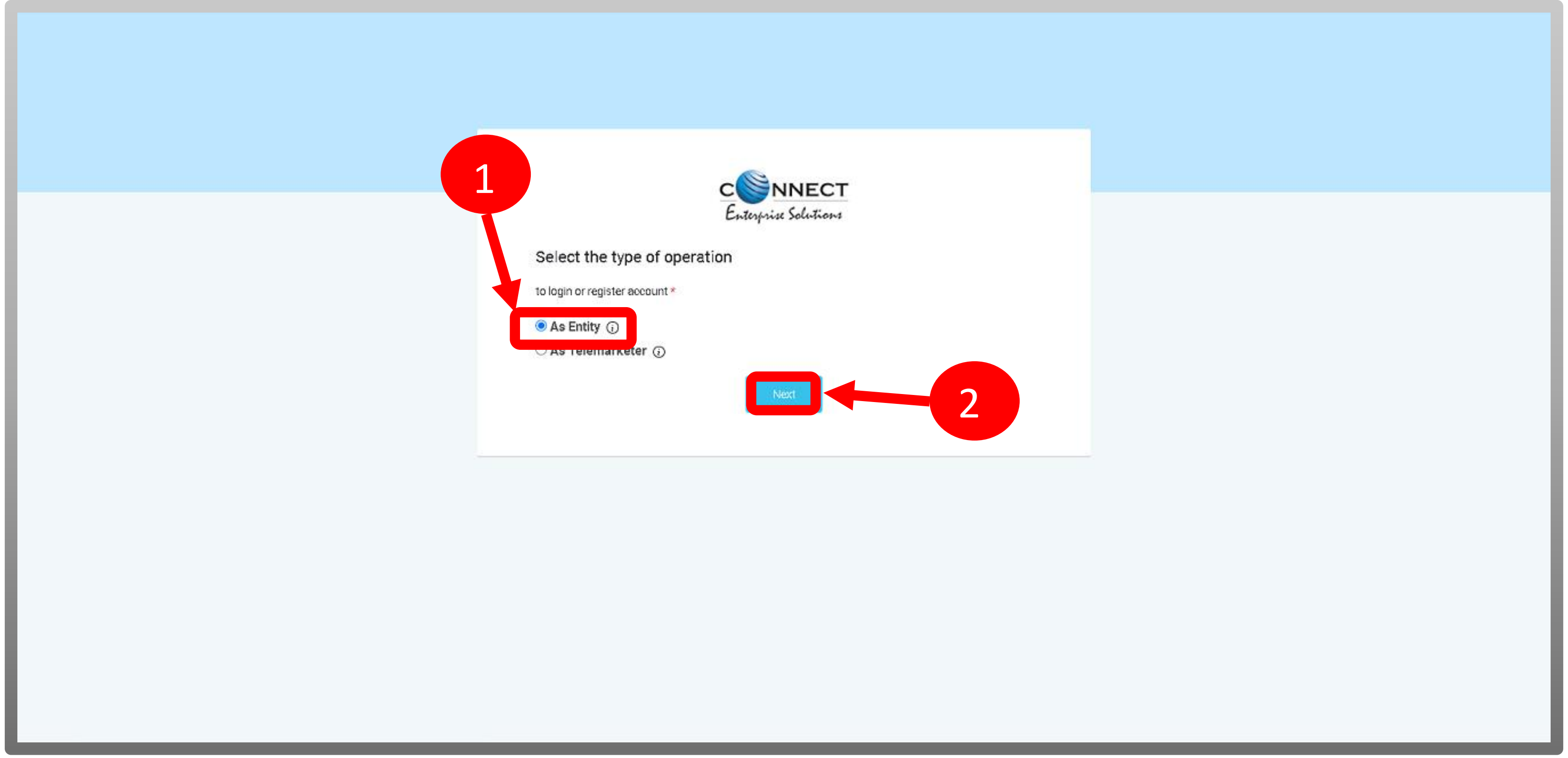
REGISTRATION

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.

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.

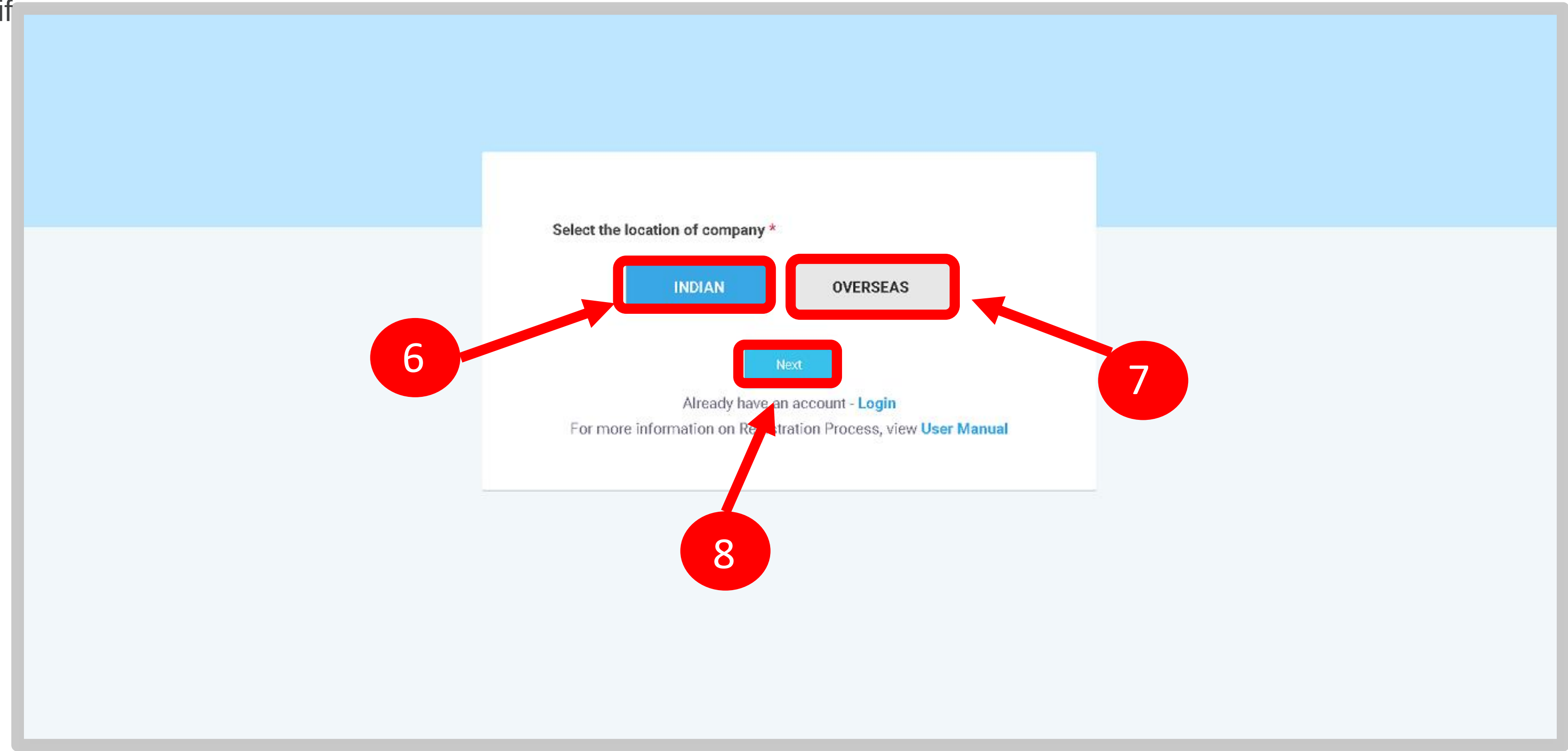
(The New Password will be sent to your Registered Email ID.)

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.



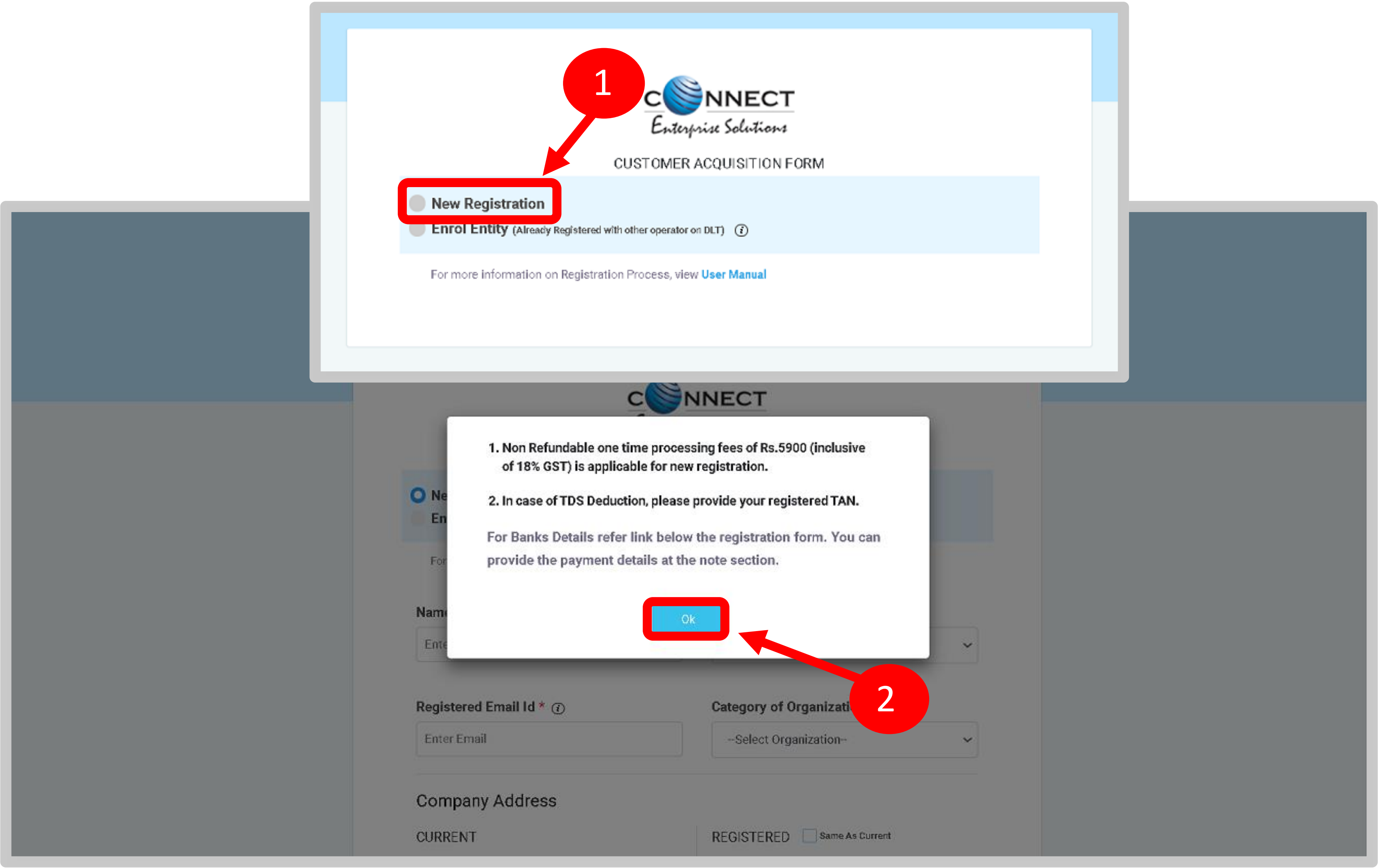
NEW ENTITY REGISTRATION

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.

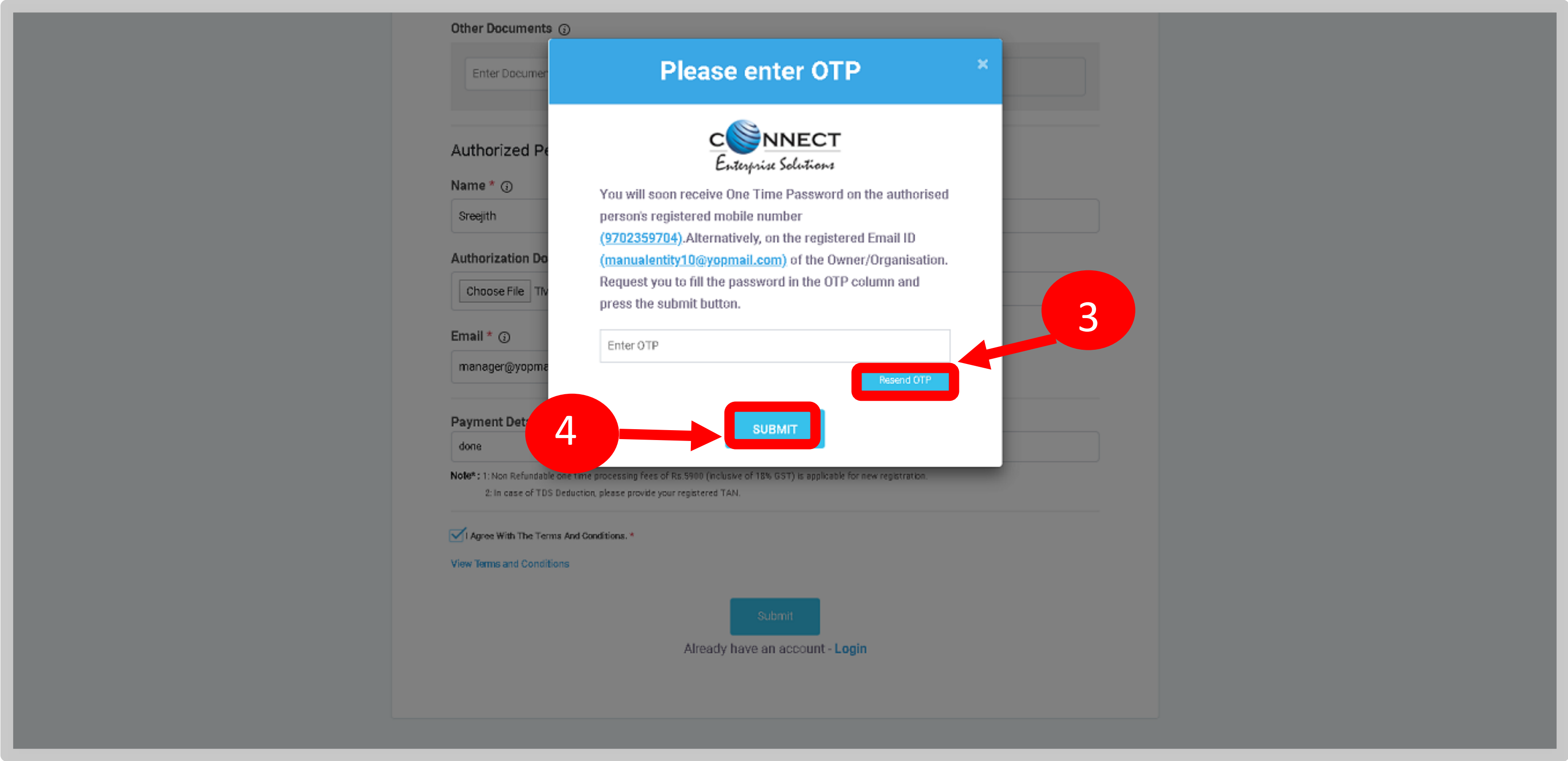
Duly fill the customer acquisition form and submit.



NEW ENTITY REGISTRATION - SIGN UP/ OTP VERIFICATION

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

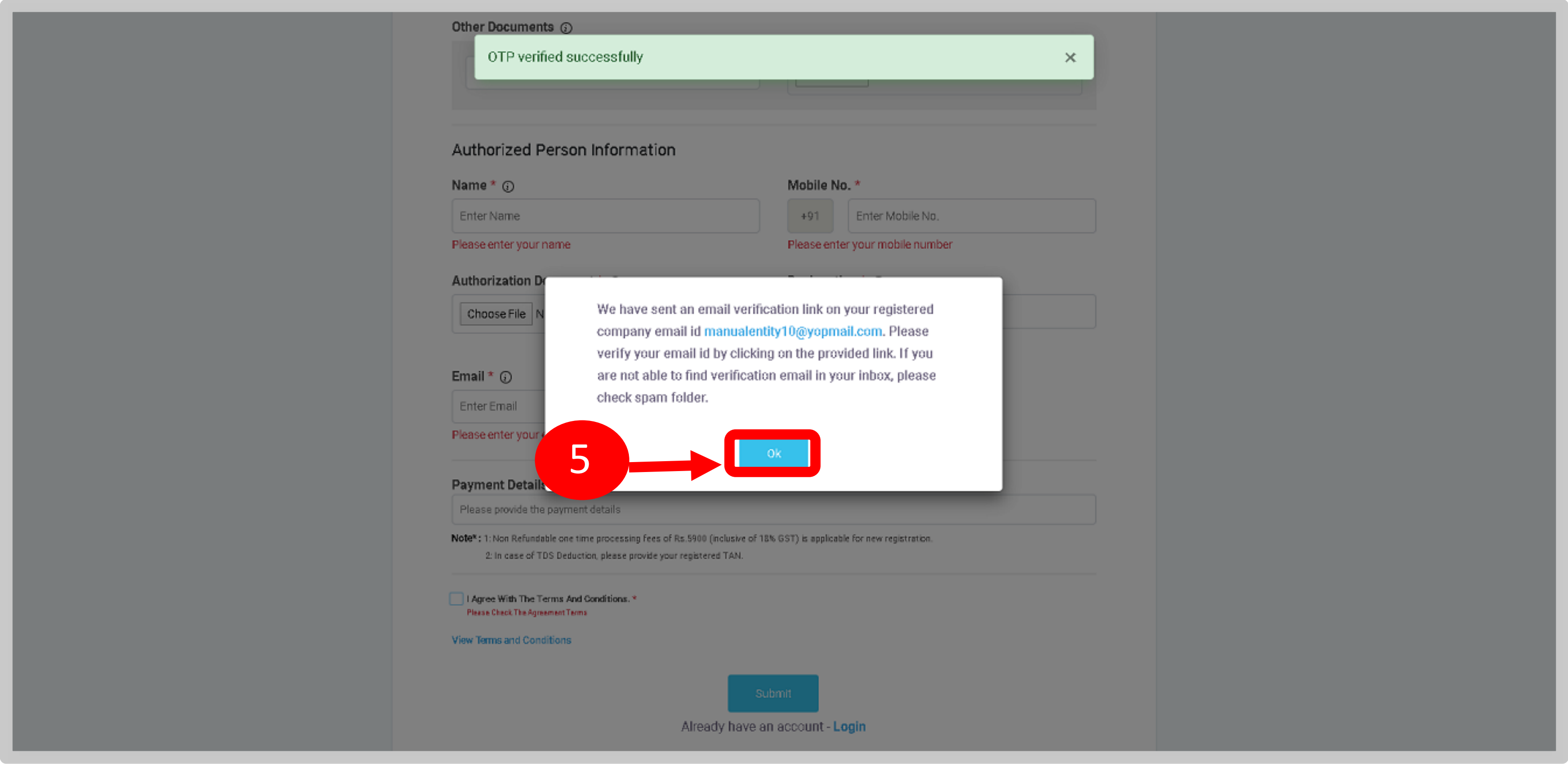


NEW ENTITY REGISTRATION - EMAIL CONFIRMATION LINK

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.

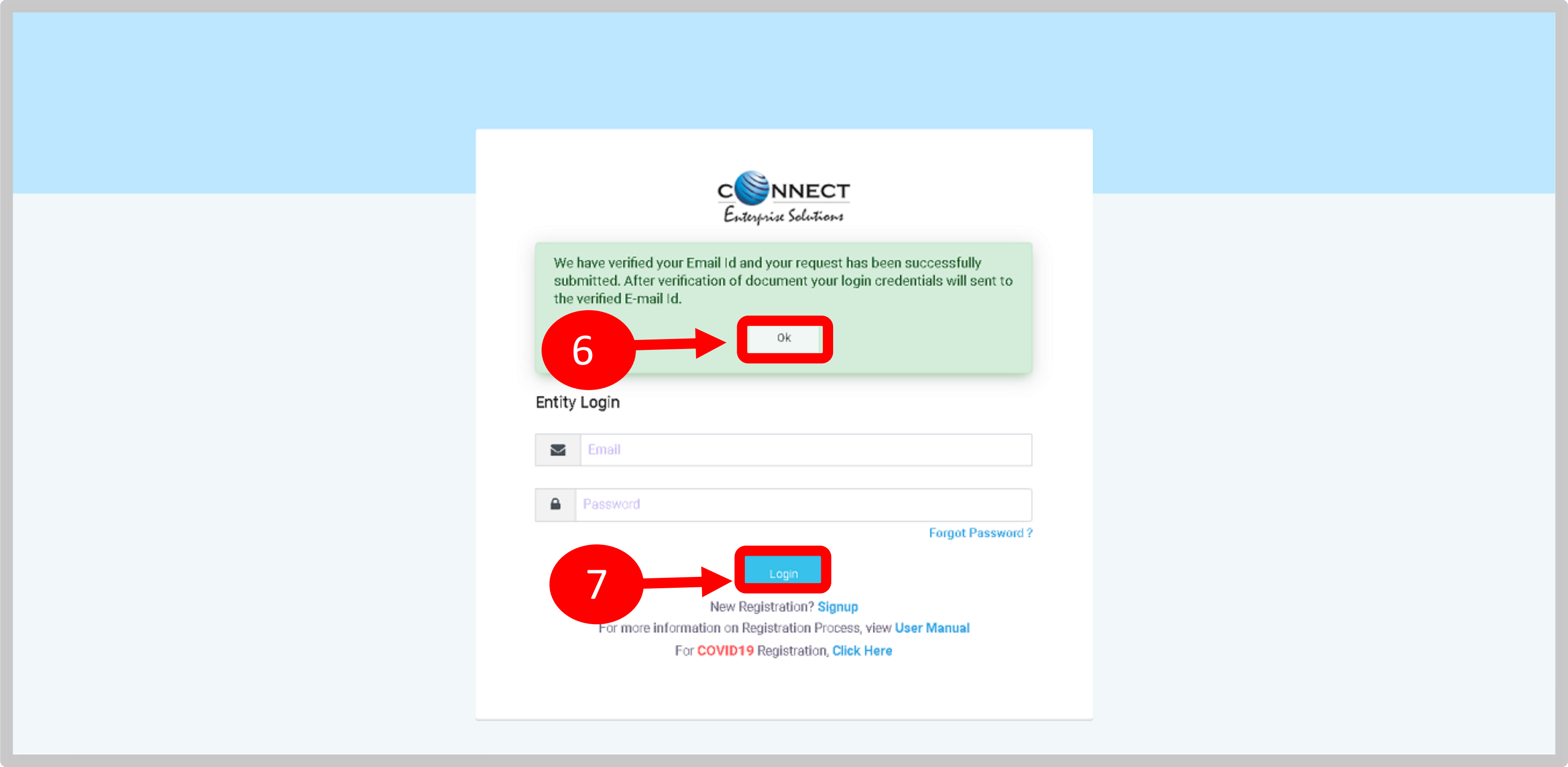


NEW ENTITY REGISTRATION - EMAIL VERIFICATION CONFIRMATION

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**



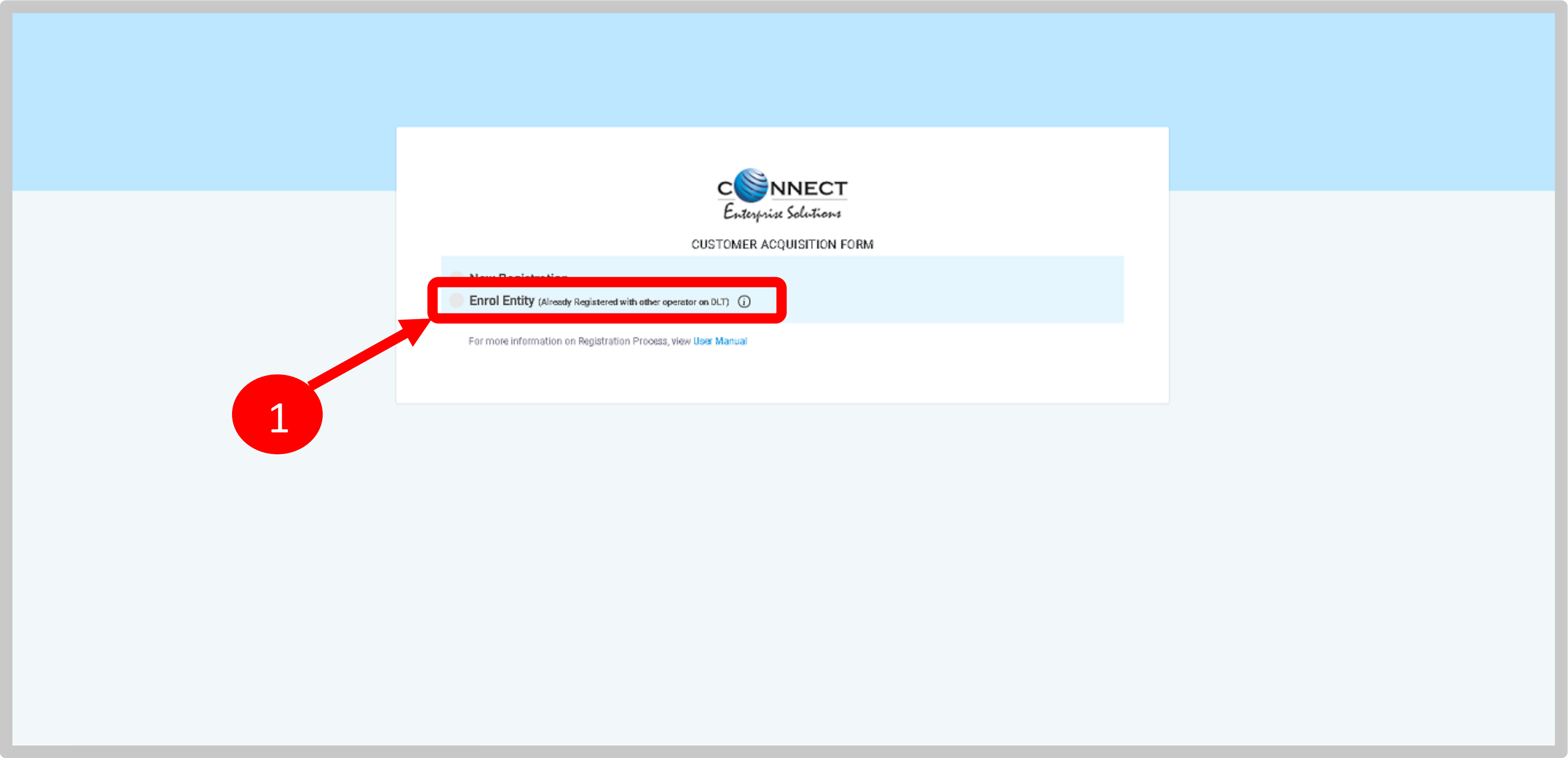
ENROL ENTITY

(ALREADY REGISTERED)

ENTITY ENROLMENT – INITIATION

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

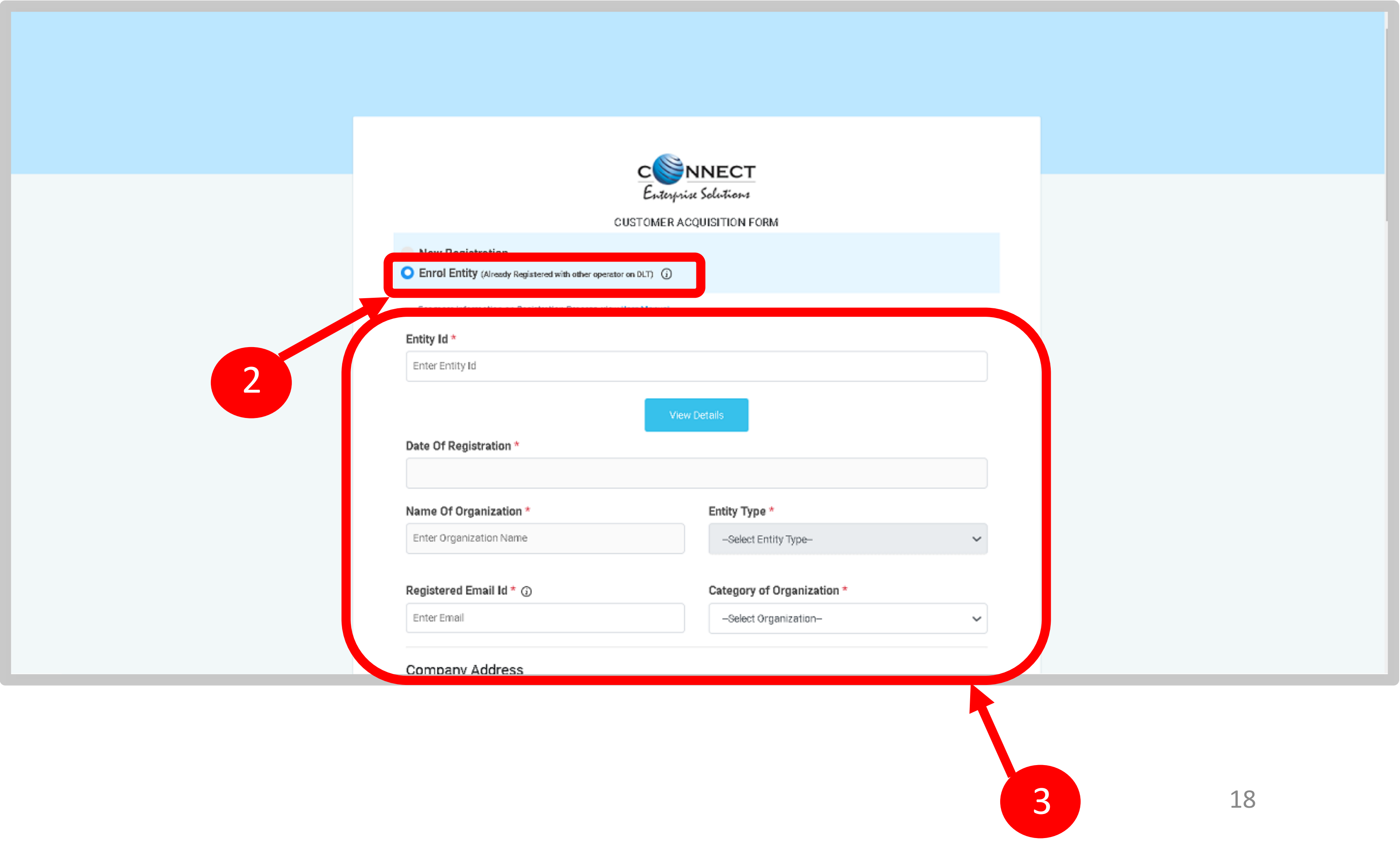
Entity already registered with other operator on DLT can enrol by providing Entity ID (DLT Registration Number)



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.



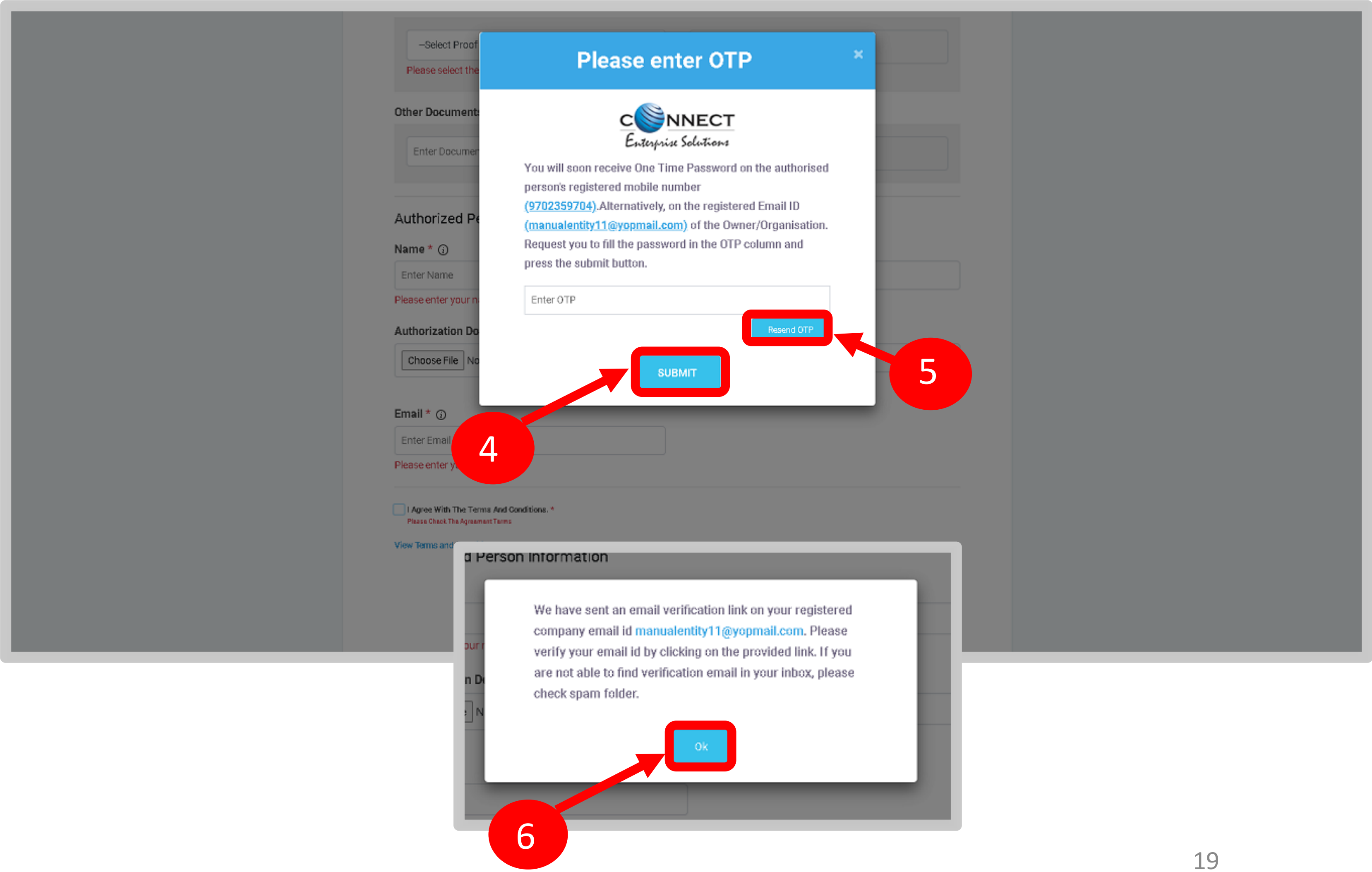
ENTITY ENROLMENT – OTP /EMAIL VERIFICATION PROCESS

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

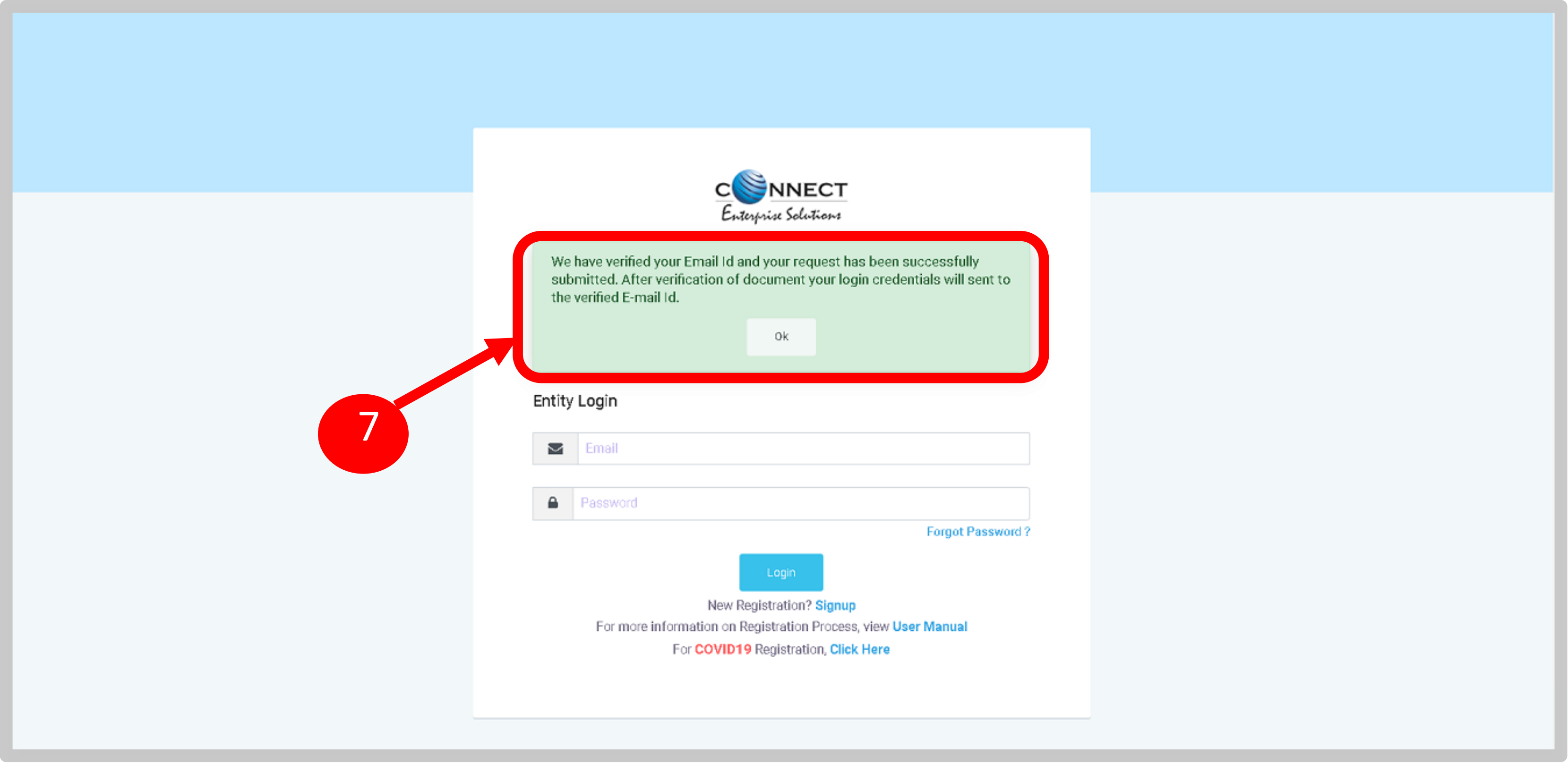
6 After verifying OTP, a verification link will be sent to your registered email Id.
Click **OK** button once you read the message and validate your mail by clicking the verification link received on your registered email id.

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.



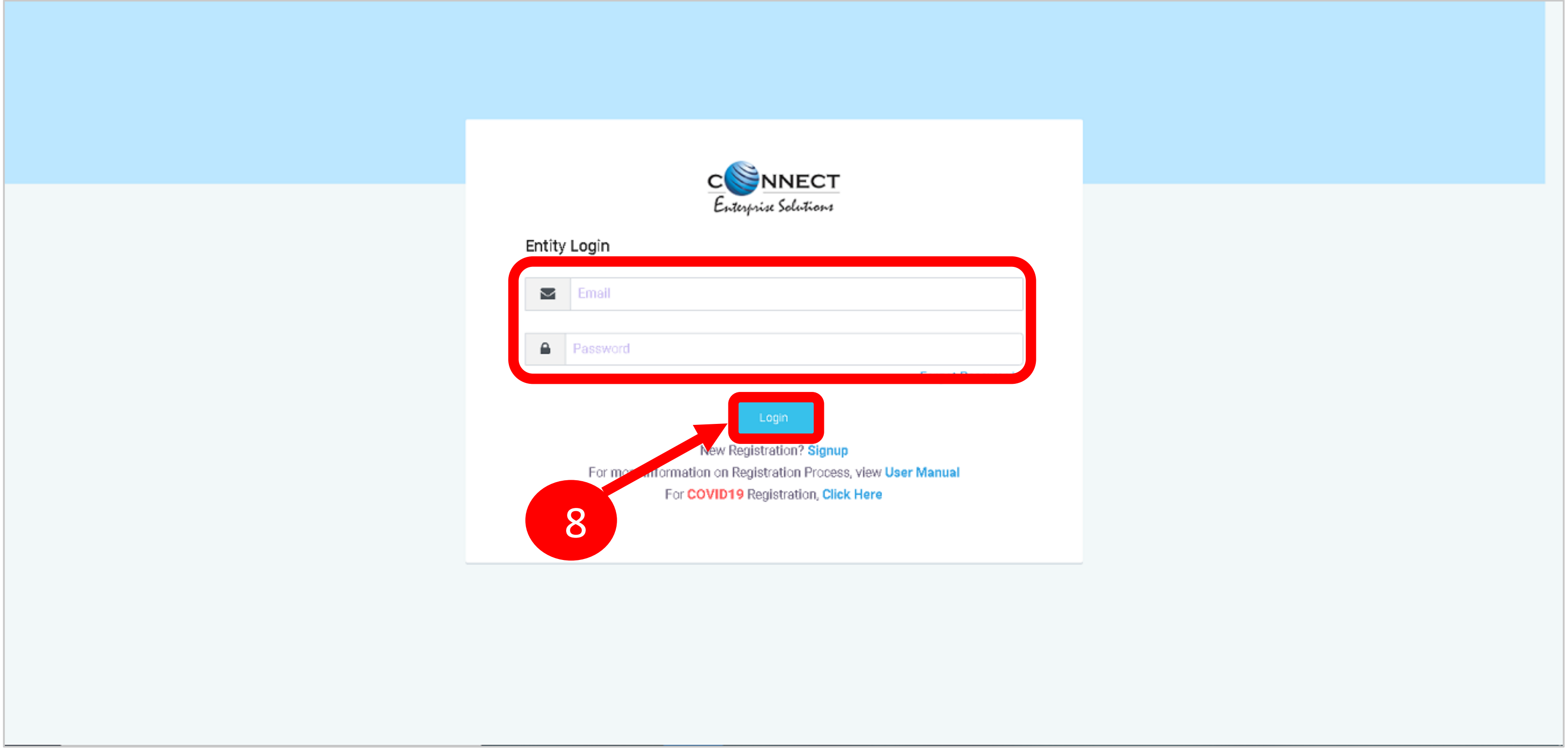
ENTITY ENROLMENT - ENTITY LOGIN PANEL

8

If you already registered as Entity.

Put in Email ID & Password and

Click **Login** Button to access the panel.



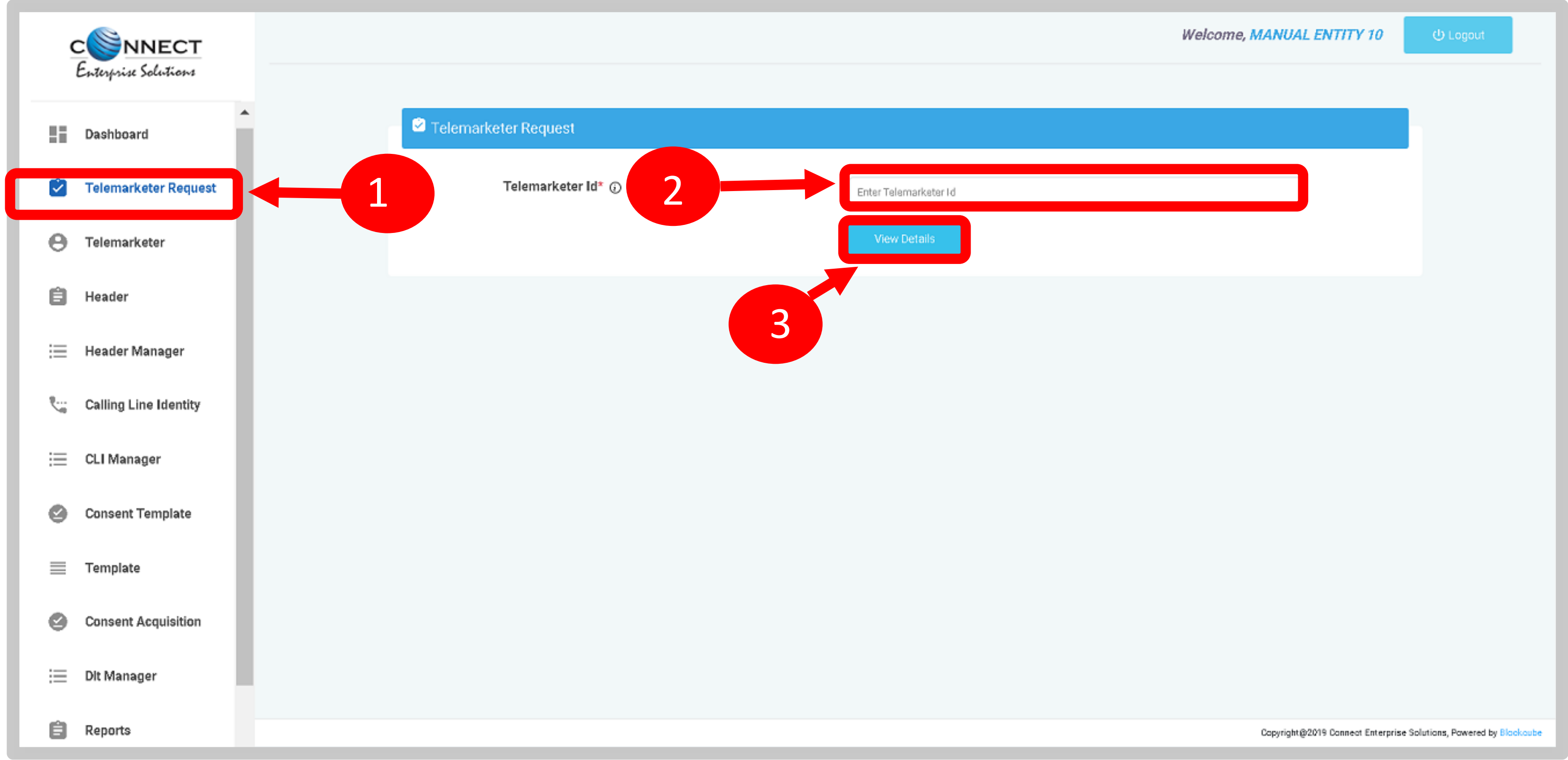
ENTITY – TELEMARKETER REQUEST

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**

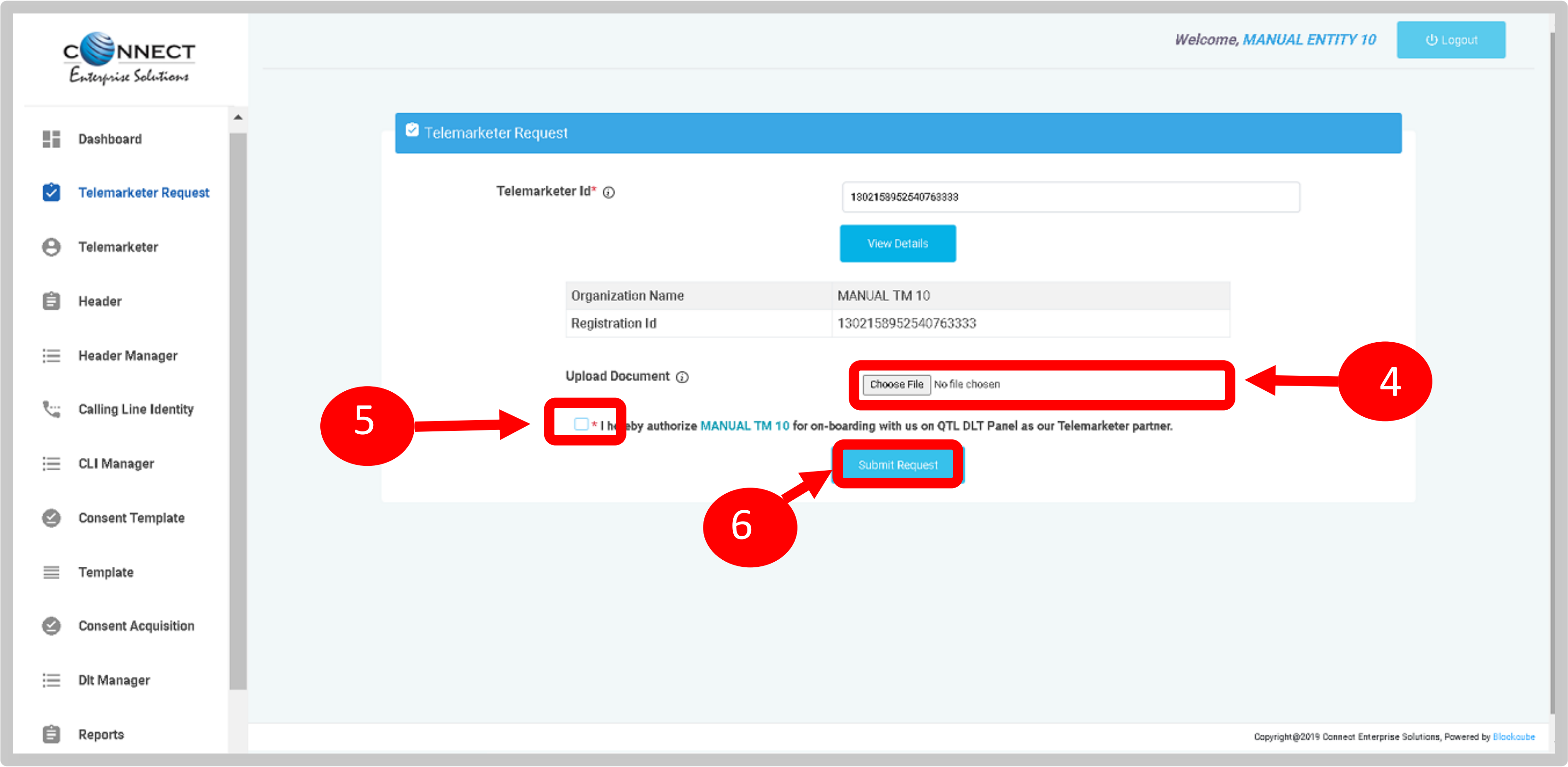


TELEMARKETER REQUEST – REQUEST SUBMISSION

4 **Upload** theAuthorized document

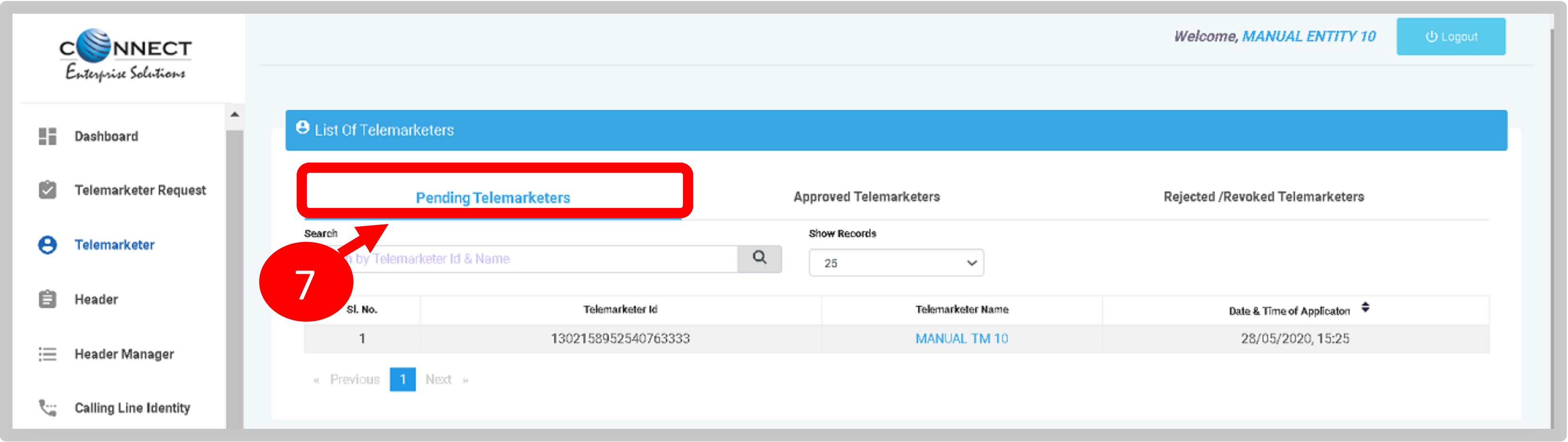
5 Check the **Box** authorizing the Telemarketer to be associated for doing commercial communication activities.

6 Clickon **Submit Request** and wait for Telemarketer's approval

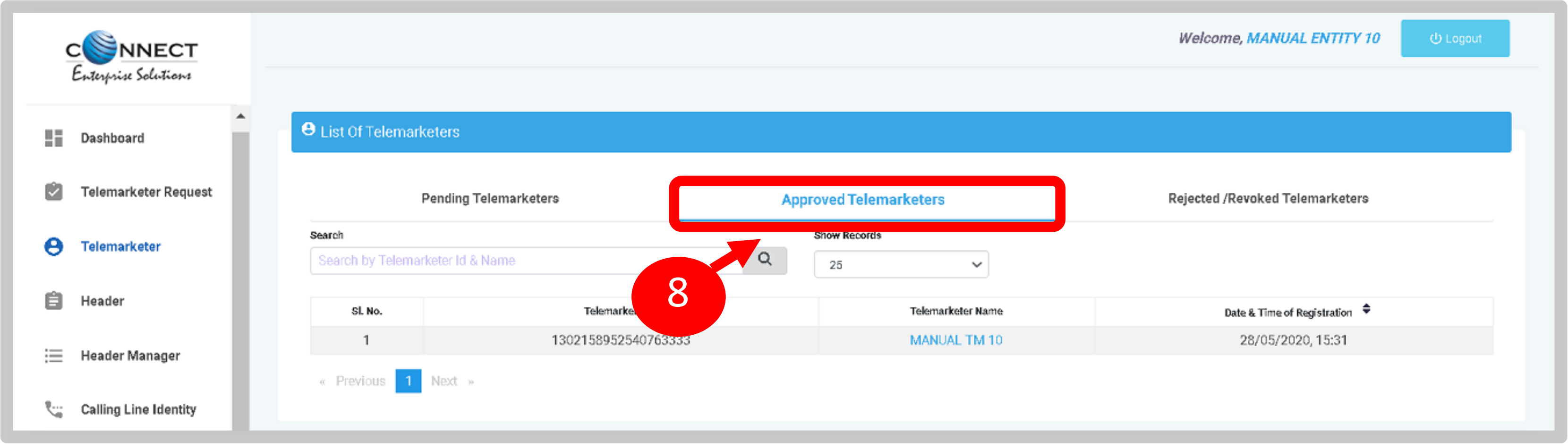


TELEMARKETER REQUEST – REQUEST STATUS

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 REVOCATION

ENTITY-TELEMARKETER RELATIONSHIP REVOCATION

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

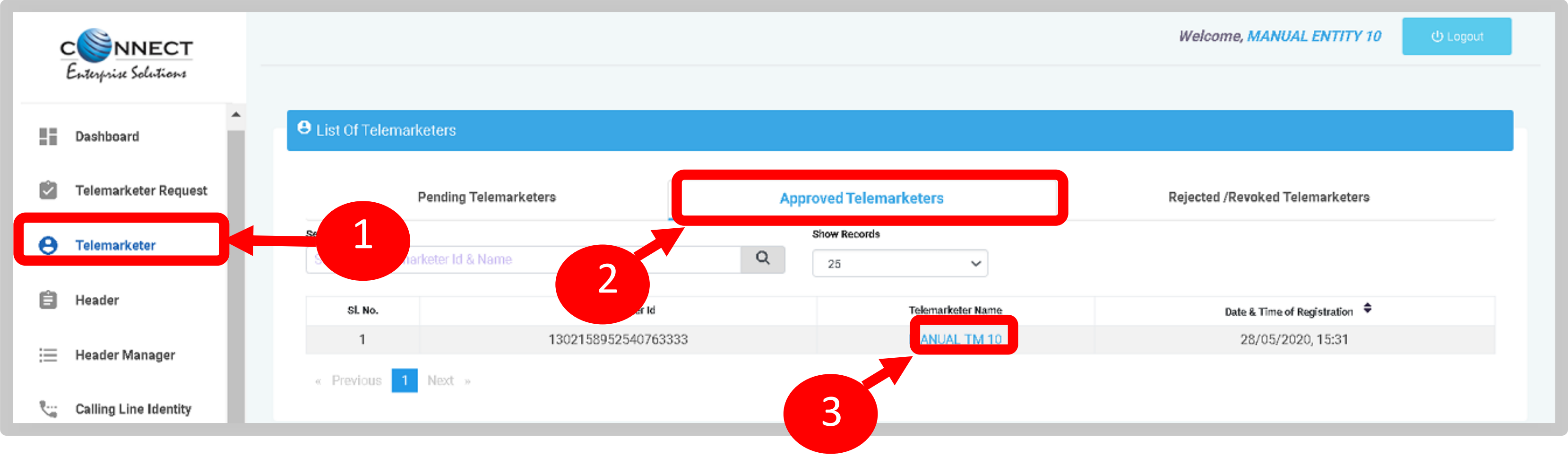
1 Select the **Telemarketer** tab from the side bar.

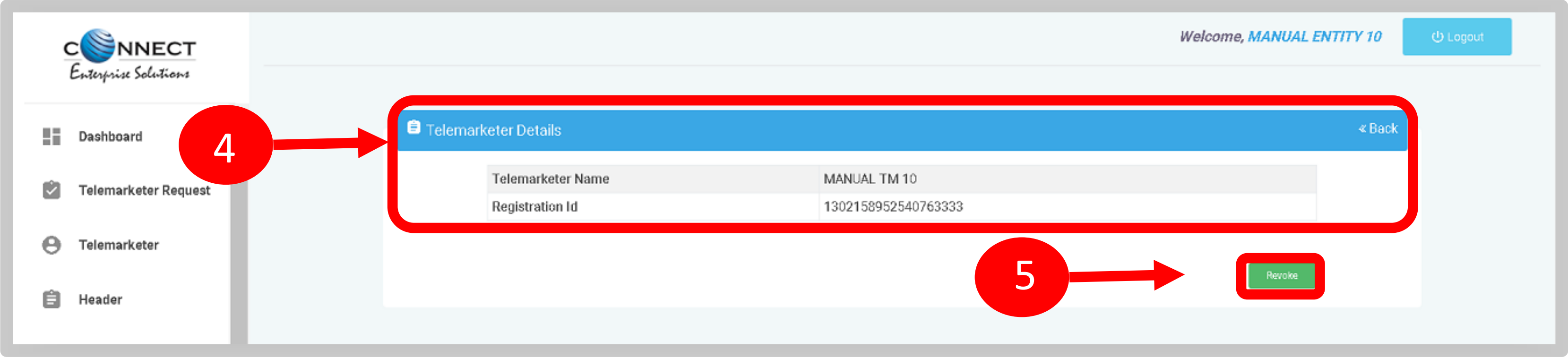
2 Go to the **Approved Telemarketer** section .

3 Click on the **Name of the Telemarketer** with whom you want to terminate the relationship.

4 **Telemarketer details** will be displayed and there will be Revoke button to terminate the business relationship.

5 Click on the **Revoke** button



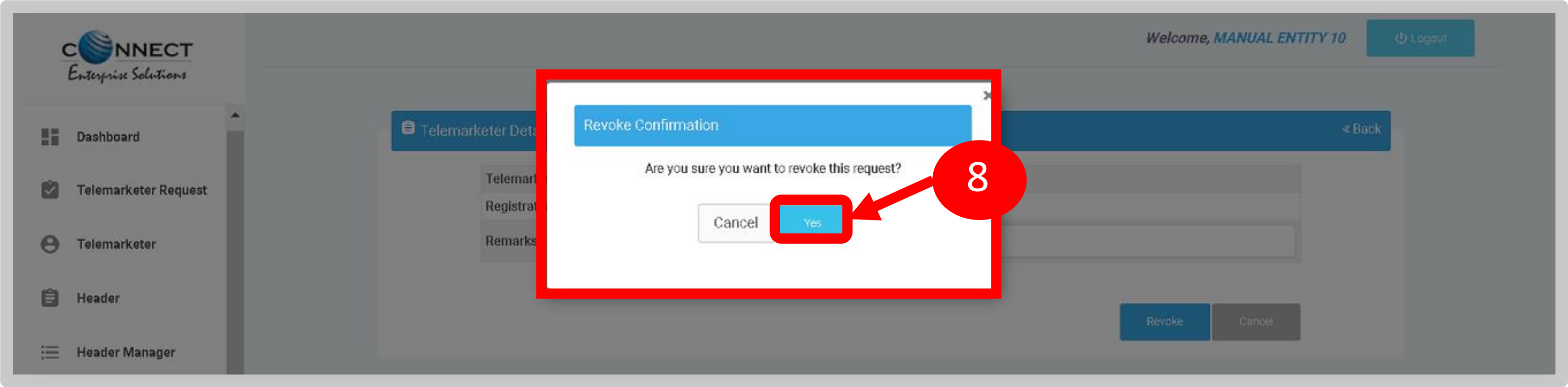


ENTITY –TELEMARKETER REVOCATION CONFIRMATION

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

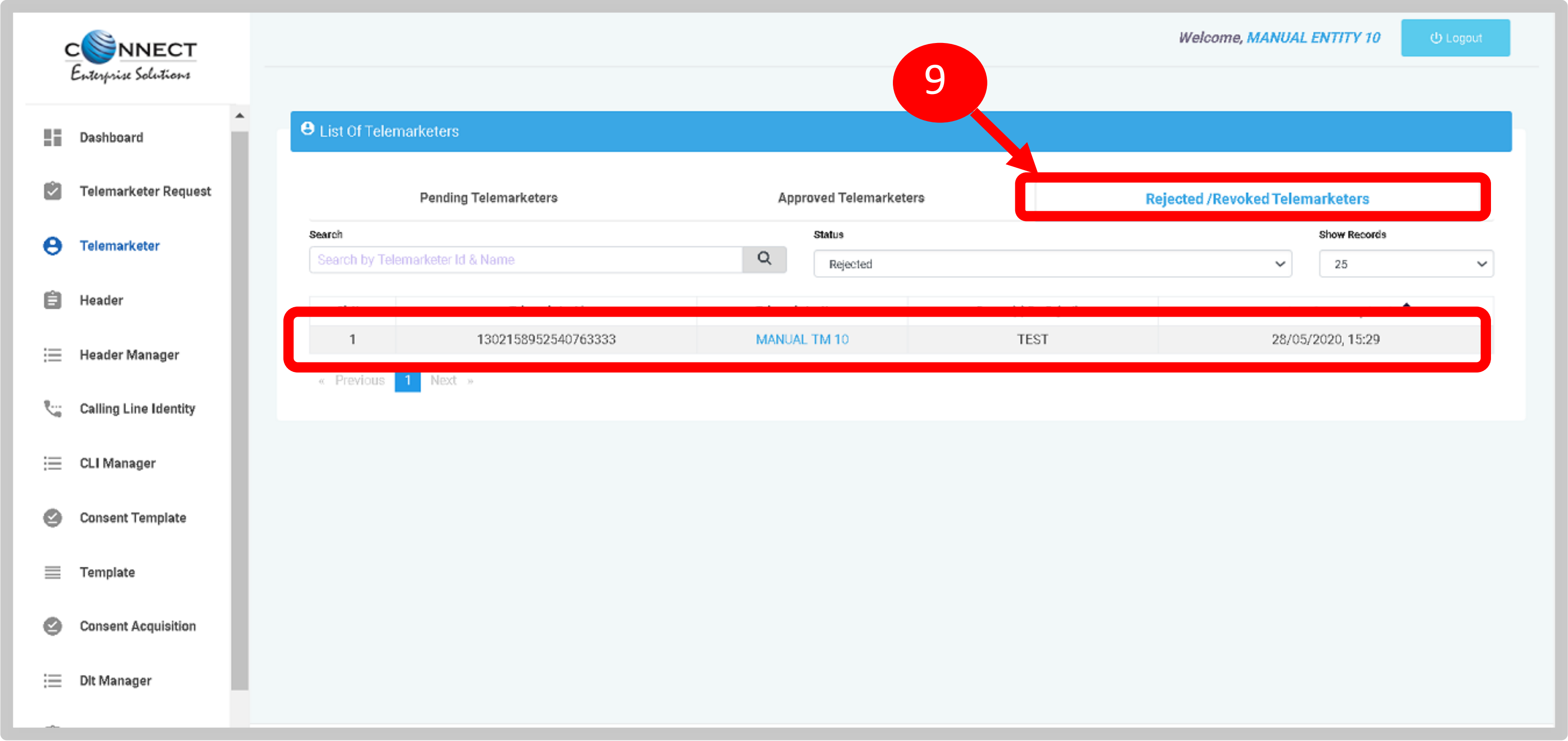
7 Press **Revoke** button after providing remarks.

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



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.



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.

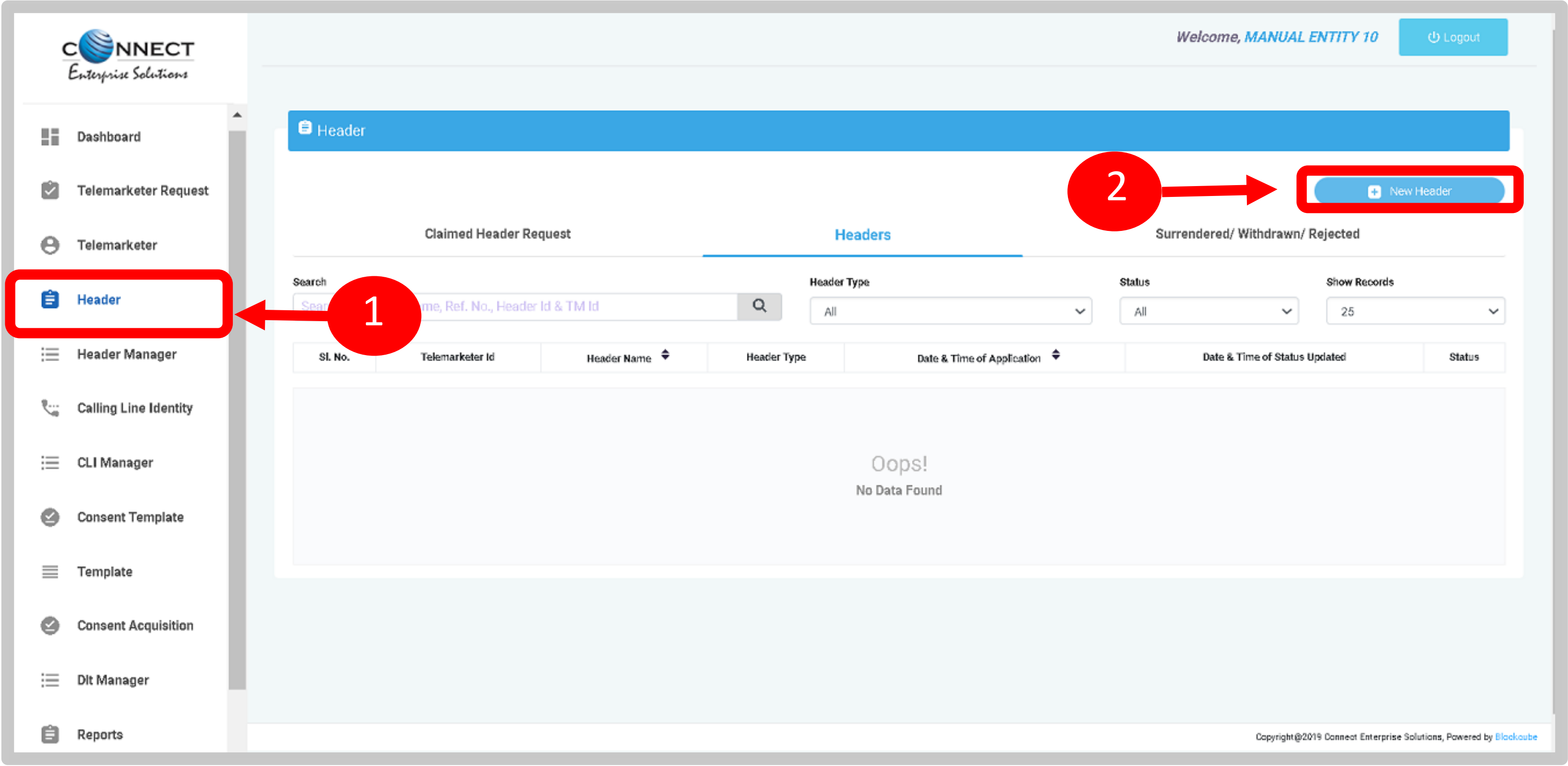
Service Implicit - Service messages that are ought to be sent basis on the business relation with the customer. Ex : Service Alert Messages

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



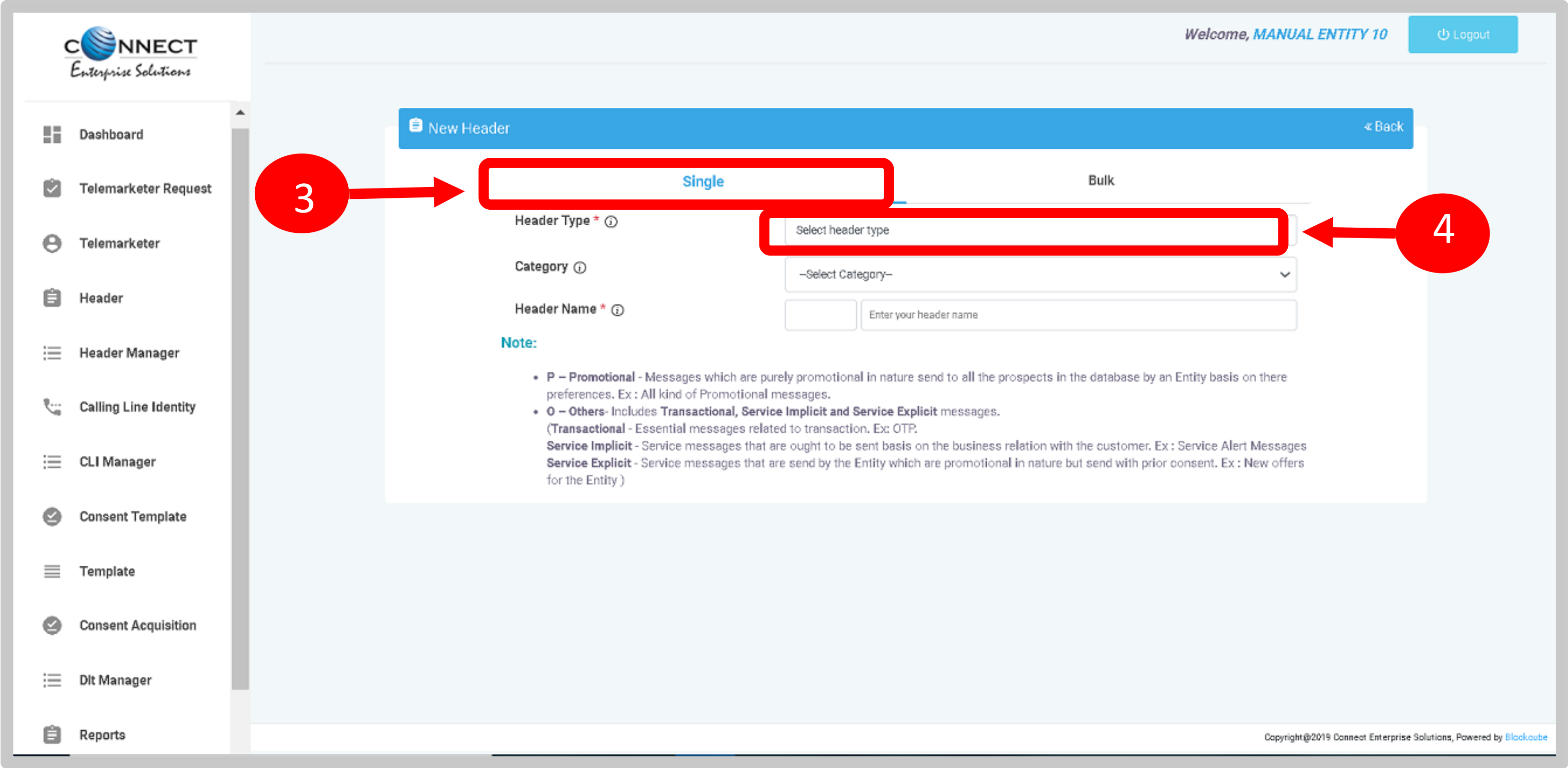
HEADER CREATION – SELECTION OF HEADER TYPE

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

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



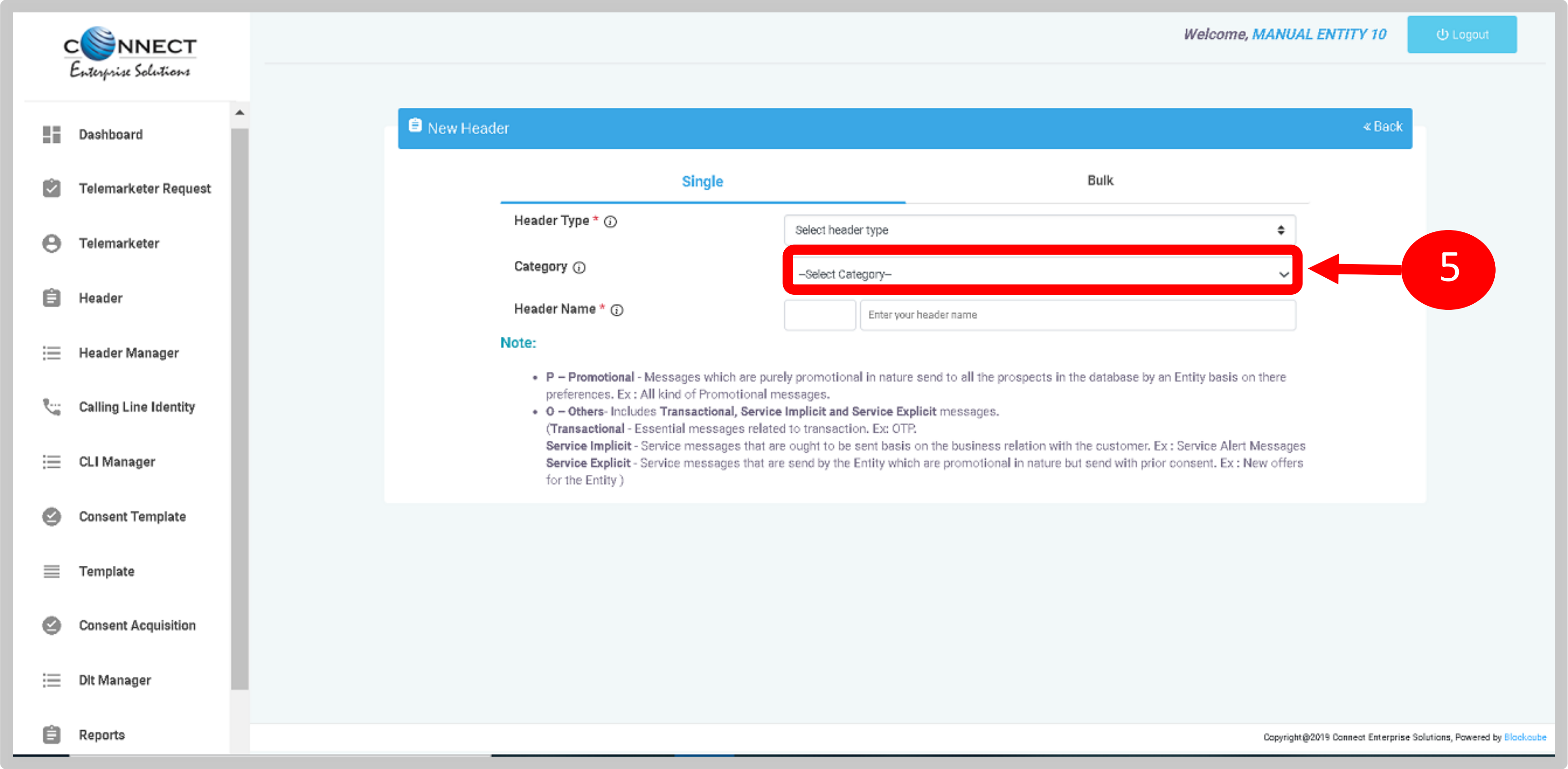
***NOTE** : In case of Goverment Entites, there will be Header Exemption option (If slected you will have to upload verification document)*

HEADER CREATION – SELECTION OF CATEGORY

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

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

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



HEADER CREATION - VALIDATION TABLE

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

Table – 1

HEADER CREATION – CREATION OF HEADER NAME

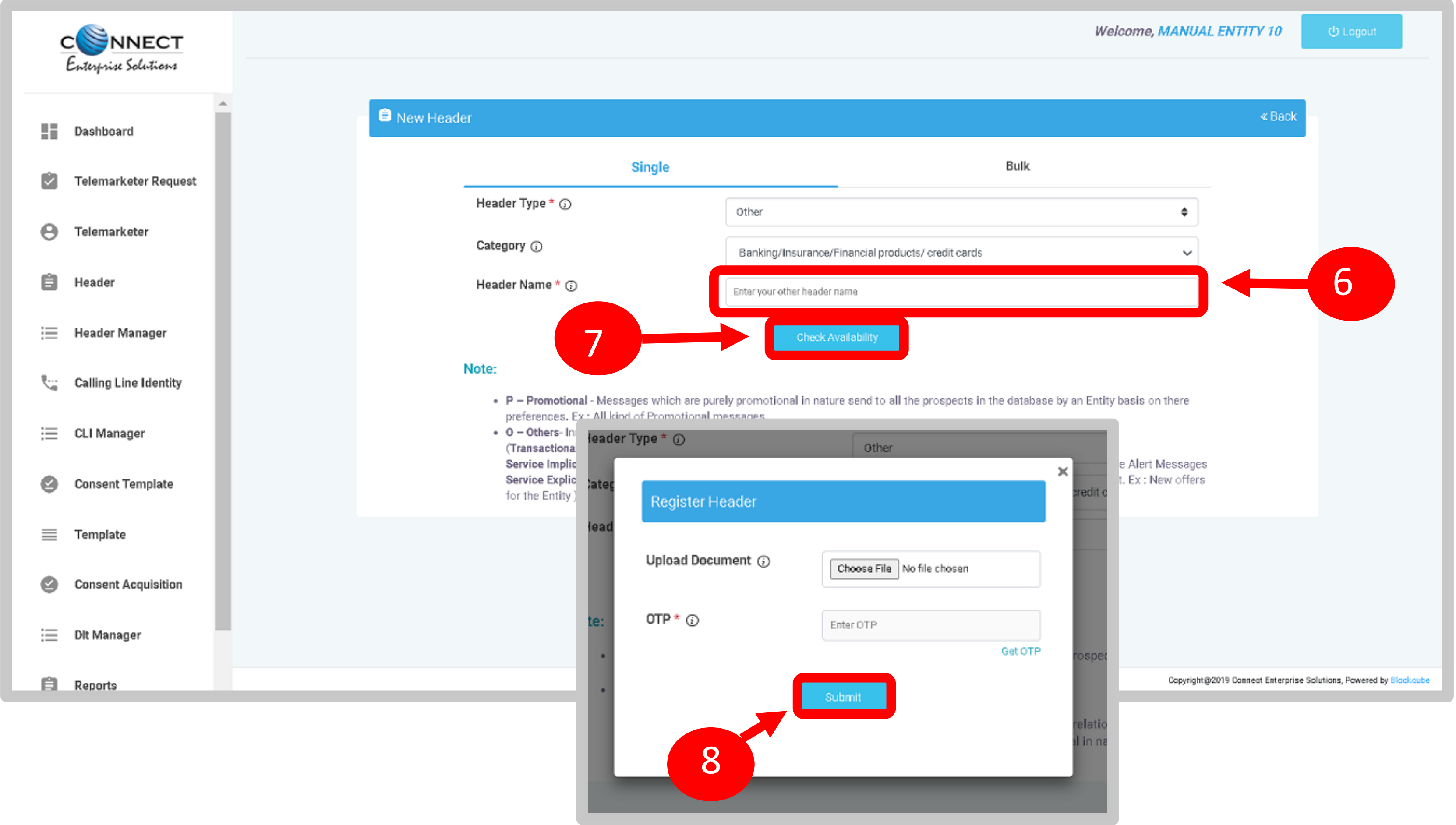
6 Type in the desired **Header Name** according to your Header Type/Brand Name or business requirement.

ⓘ *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.*

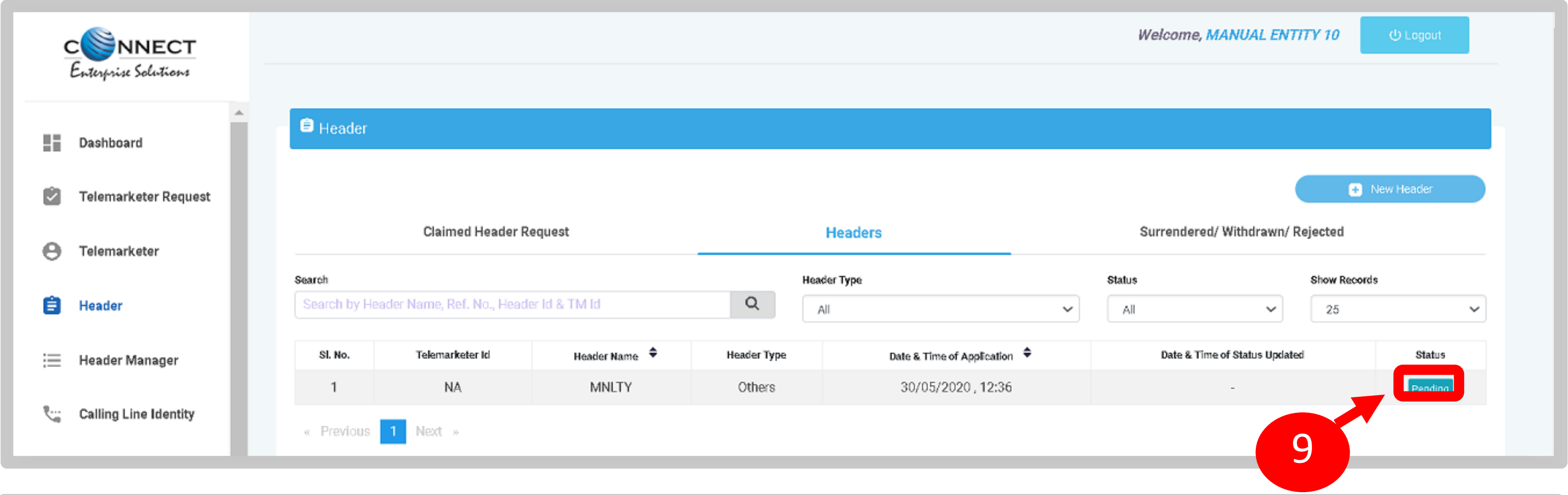
7 Click **Check Availability** to check the availability of header name. If available proceed with next step. If not available follow the claim process.

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

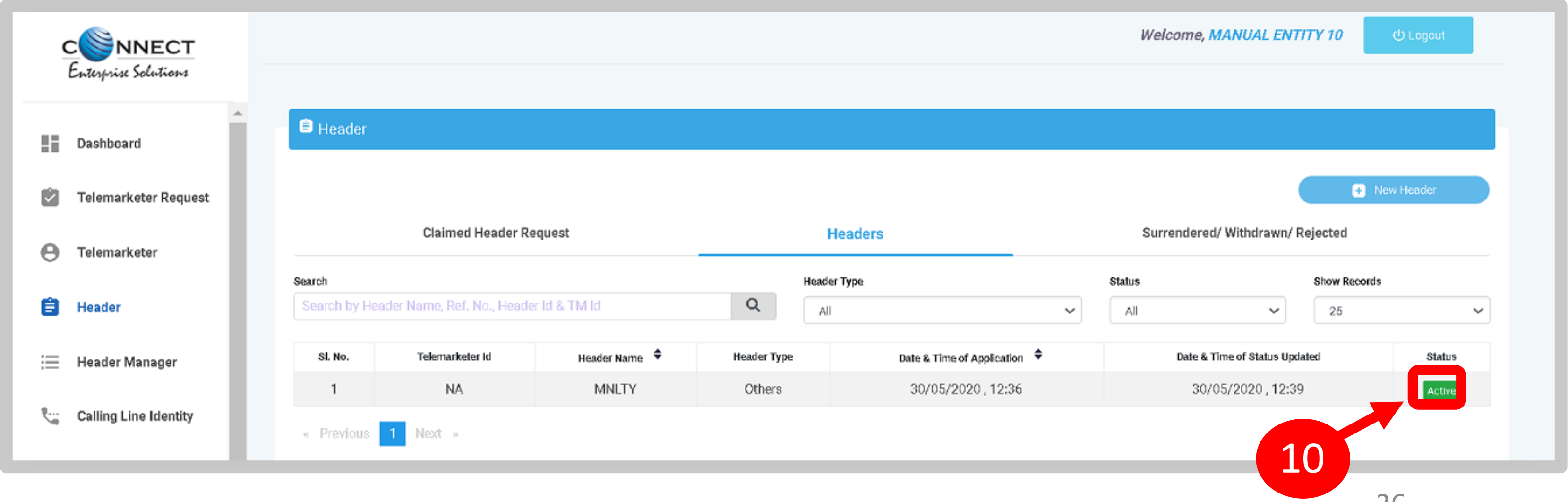


HEADER CREATION – HEADER STATUS

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.**



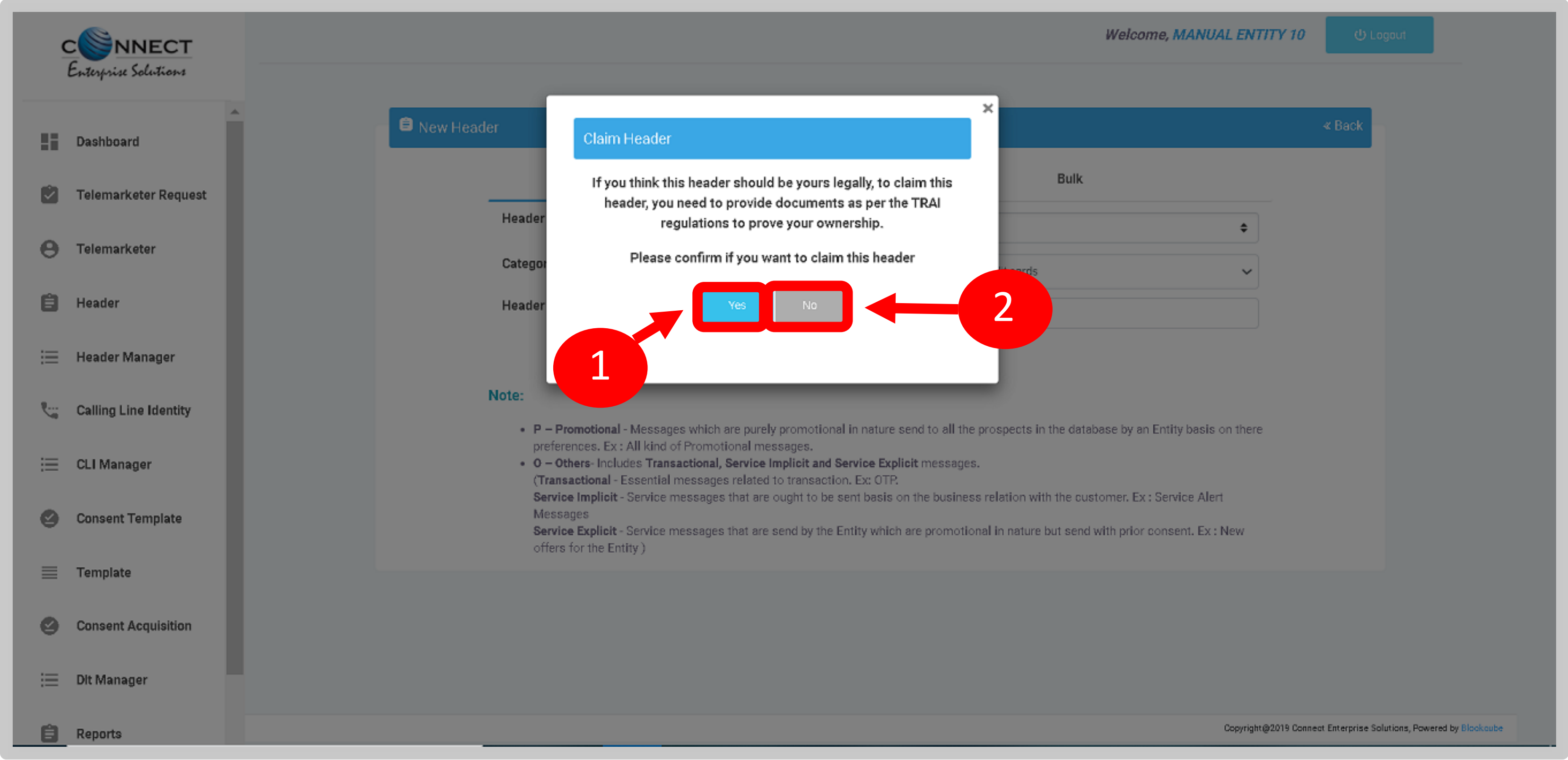
CLAIM HEADER

CLAIM HEADER – CLAIM INITIATION

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

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

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



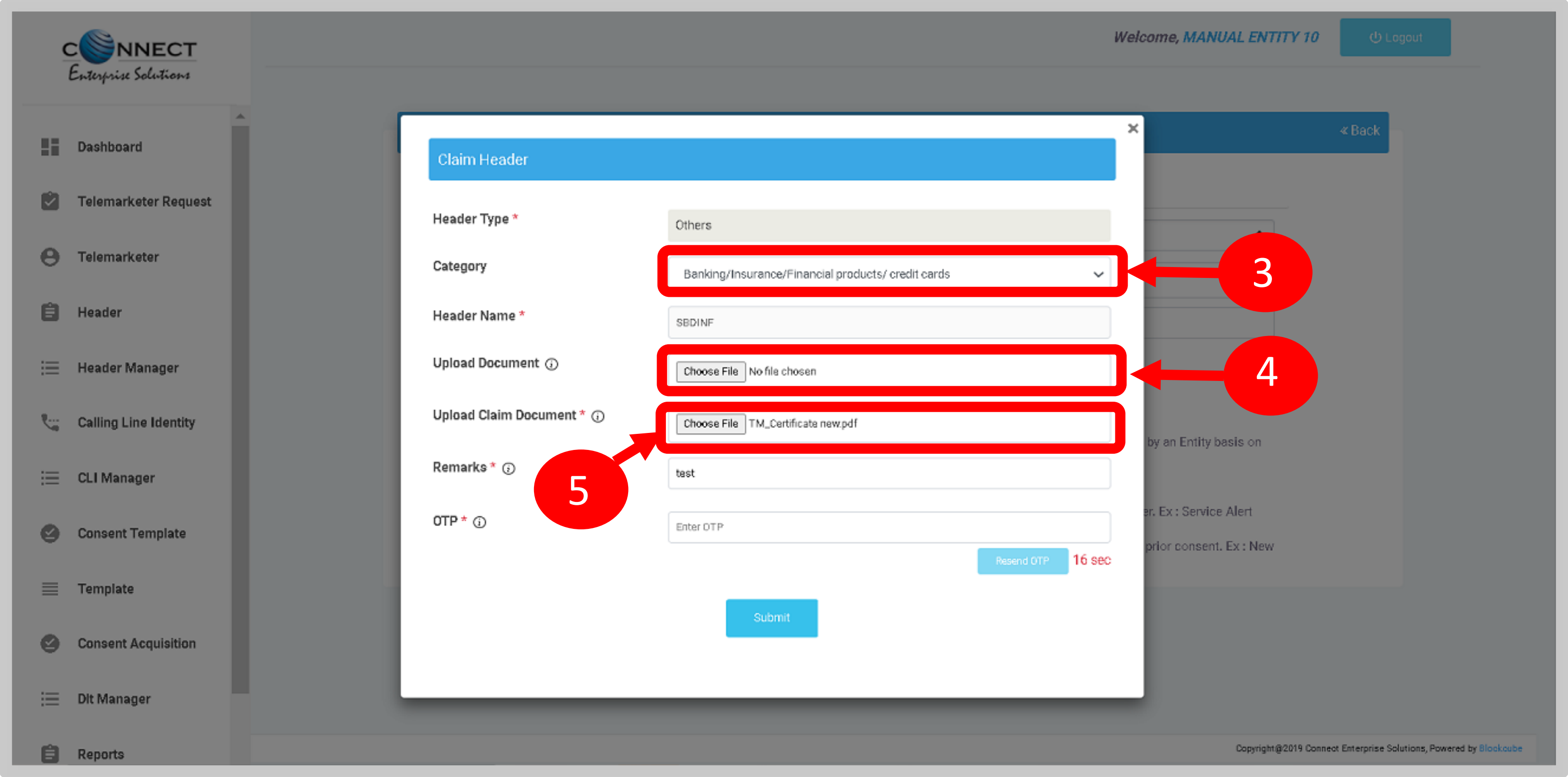
CLAIM HEADER – CATEGORY SELECTION / DOCUMENT UPLOAD

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.



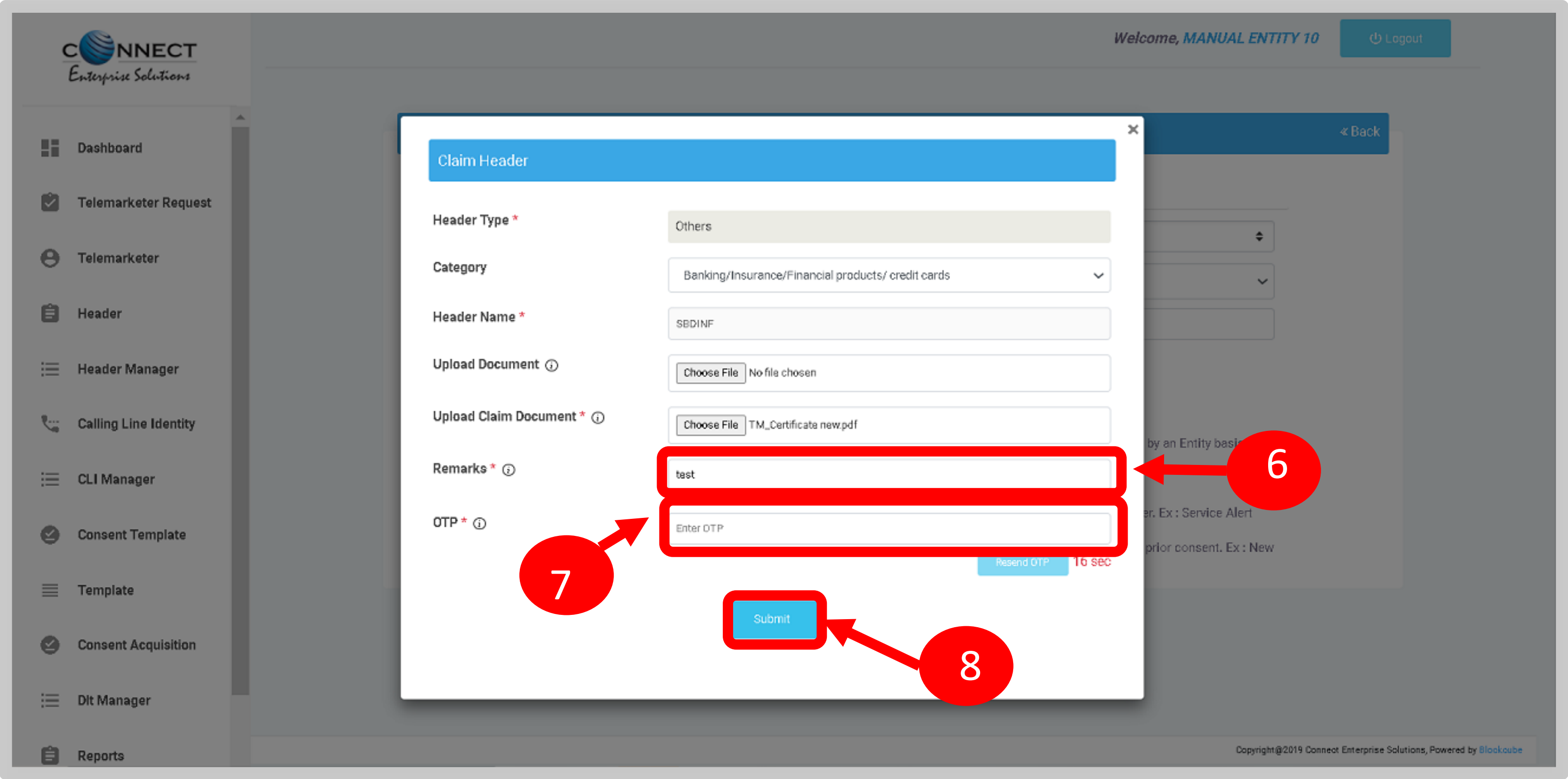
NOTE :*In case of Government Entities, there will be Header Exemption option (If selected you will have to upload verification document)*

CLAIM HEADER – REMARKS/OTP/ SUBMISSION OF CLAIM

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

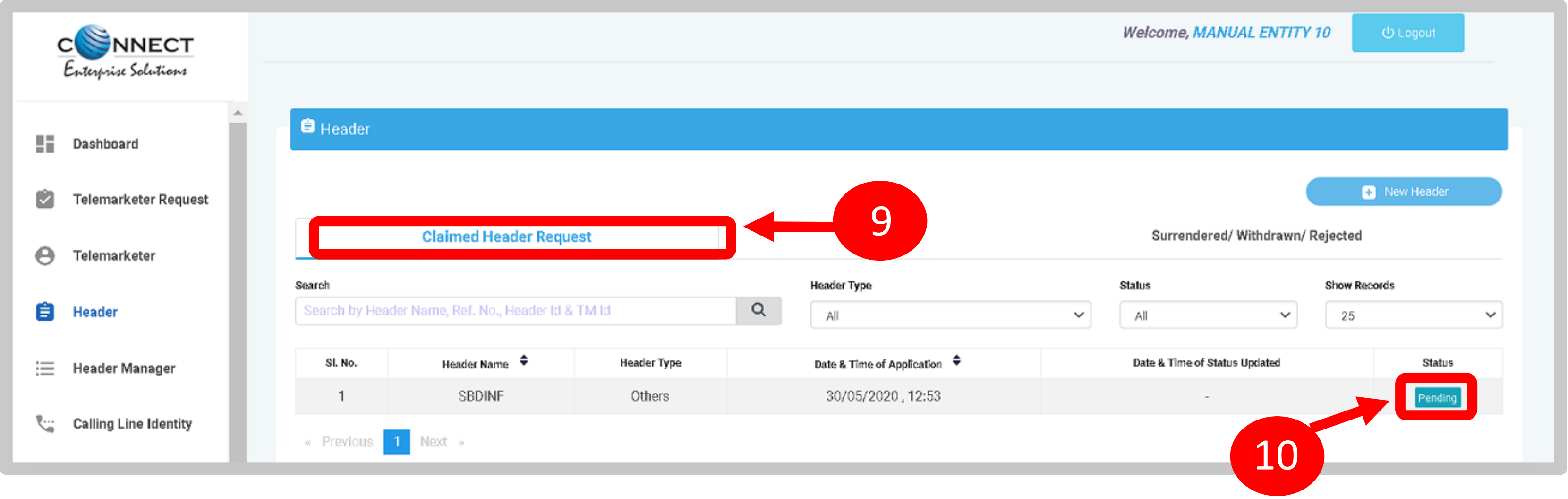
7 Click **Get OTP** and type in OTP to verify the header details and click. You will receive the password on the authorized person's registered mobile number.

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

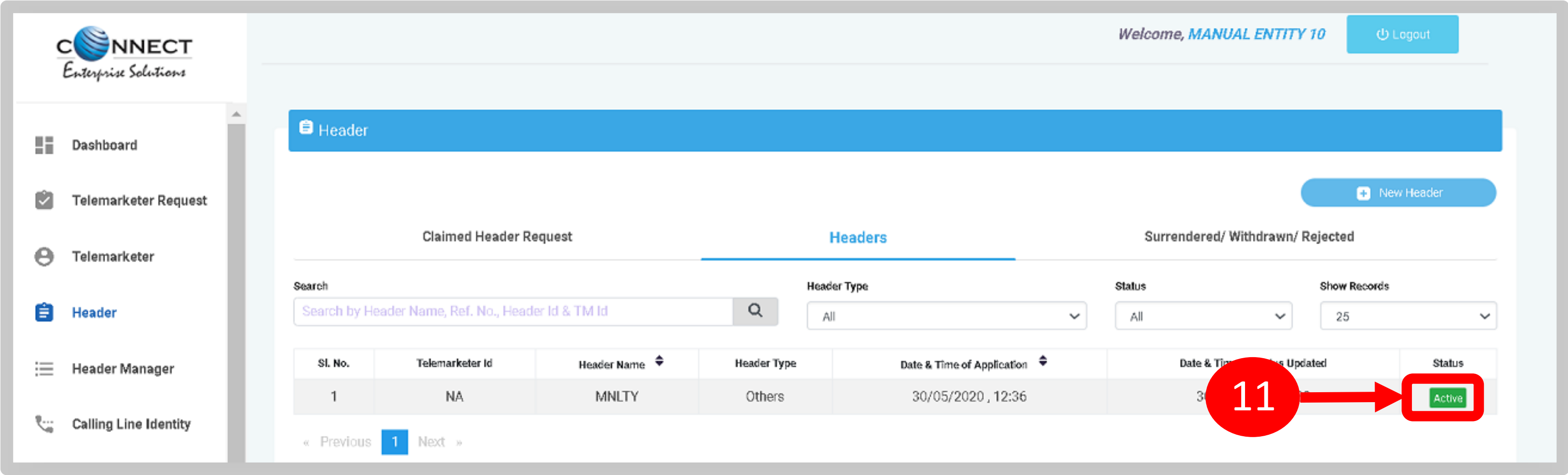


CLAIM HEADER – REQUEST STATUS

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**.

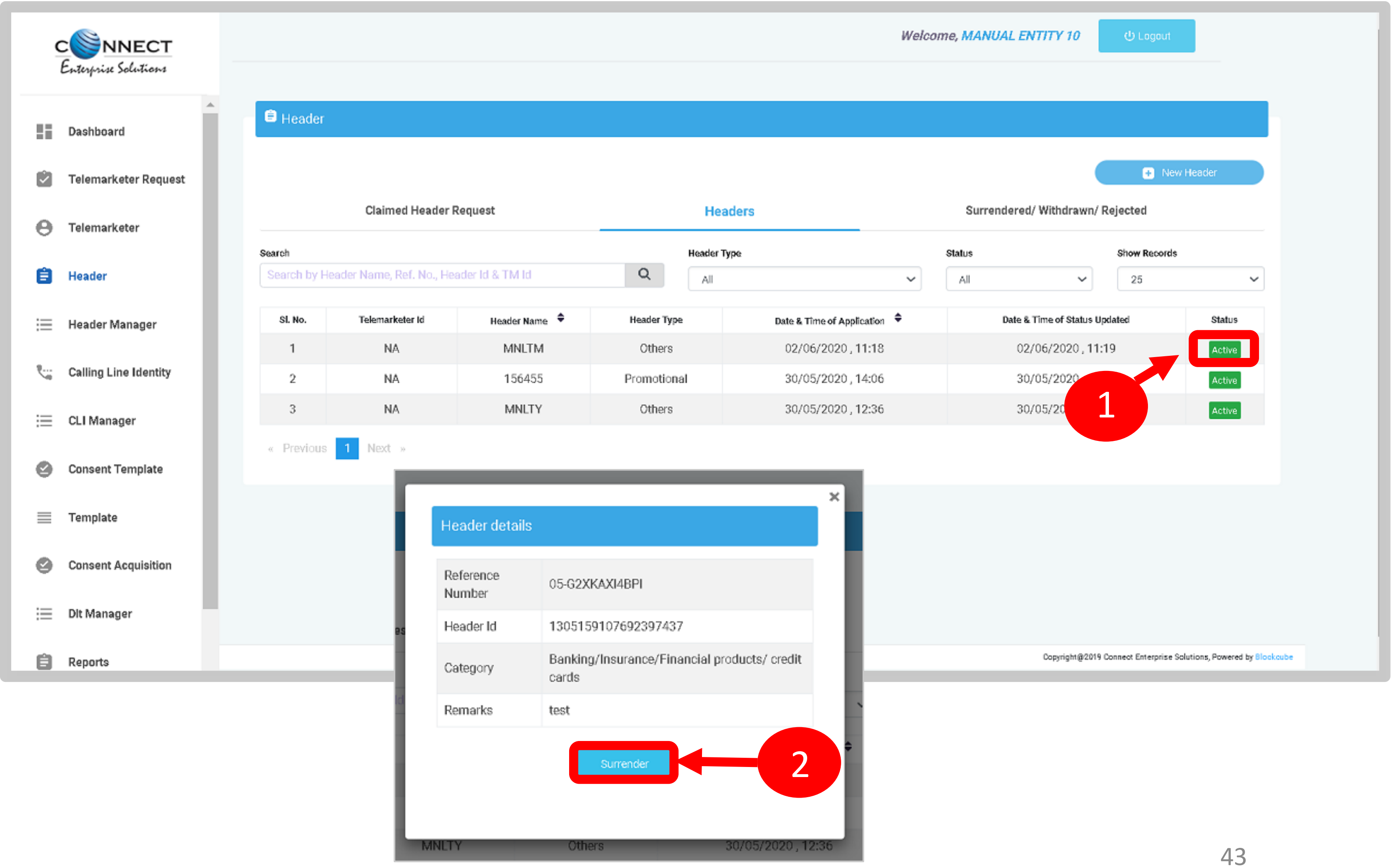
HEADER – SURRENDER

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 surrender the header.

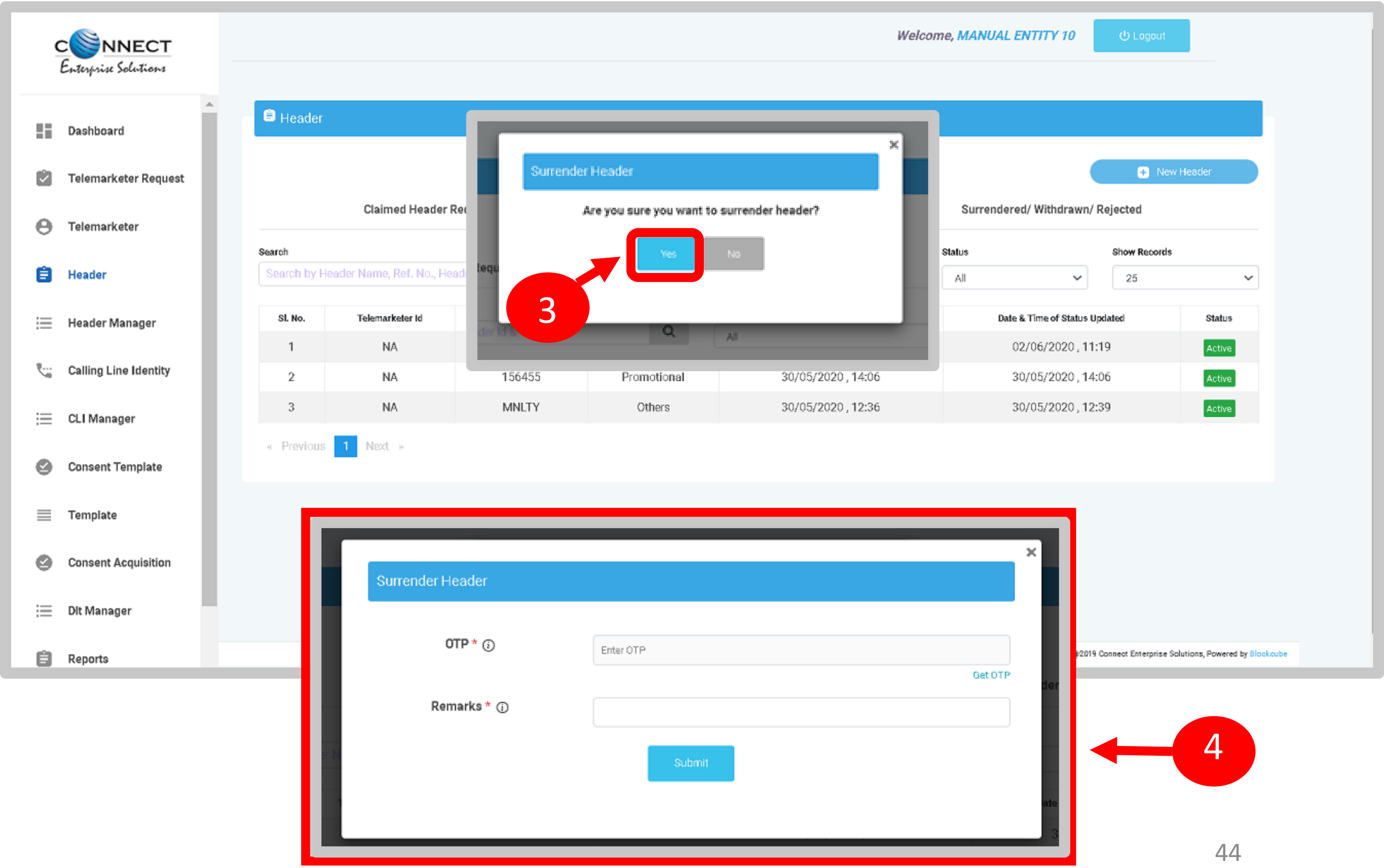
2. Click **Surrender** and confirm that you want to surrender your header.



HEADER SURRENDER – OTP / CONFIRMATION

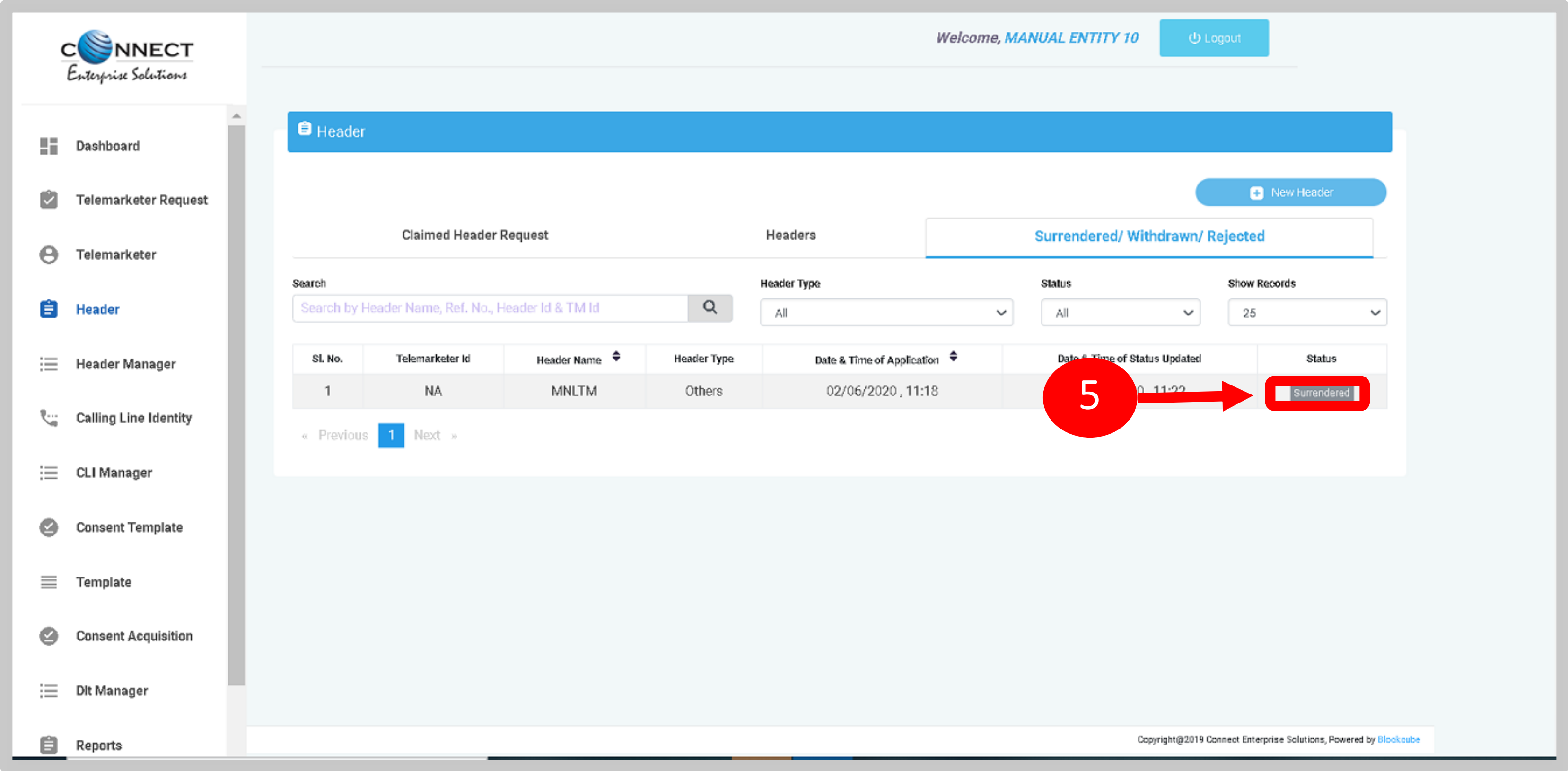
3 A Pop-up will appear to confirm the Surrender process, Press **YES** button to confirm.

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



HEADER SURRENDER - STATUS

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



HEADER MANAGER

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

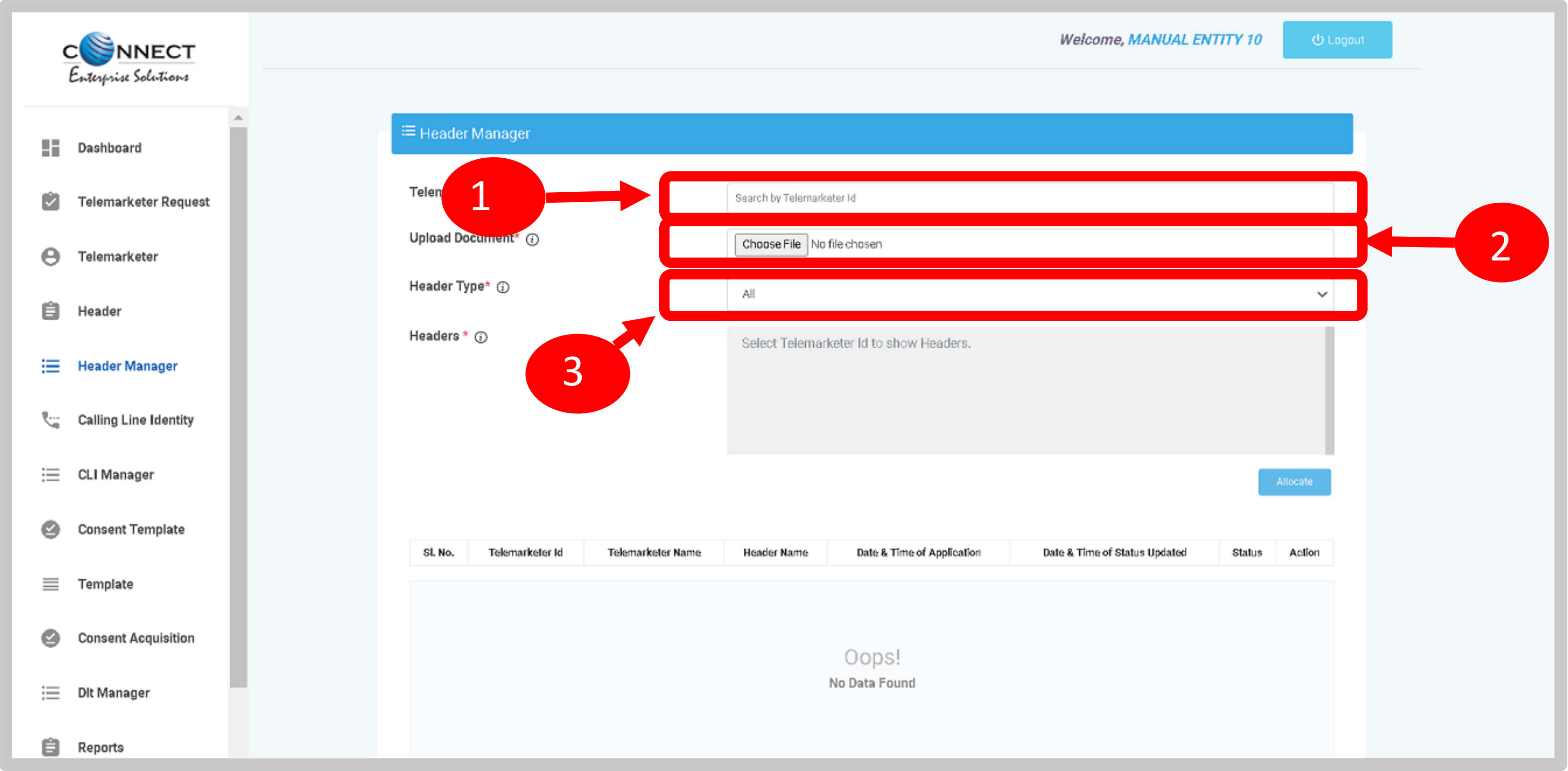
HEADER MANAGER – SELECTION OF TELEMARKETER

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

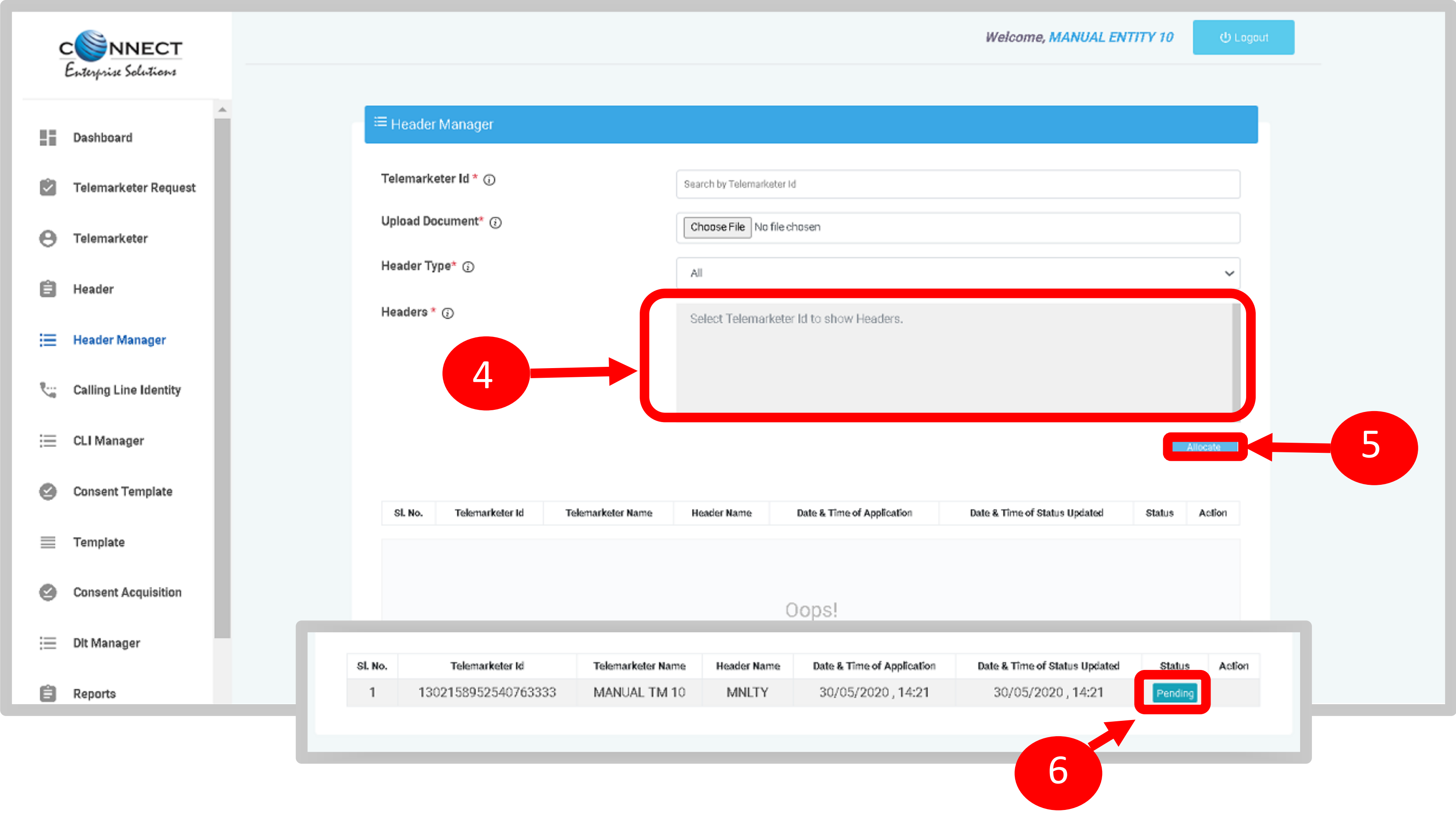


HEADER MANAGER – ALLOCATION OF HEADER(S)

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.



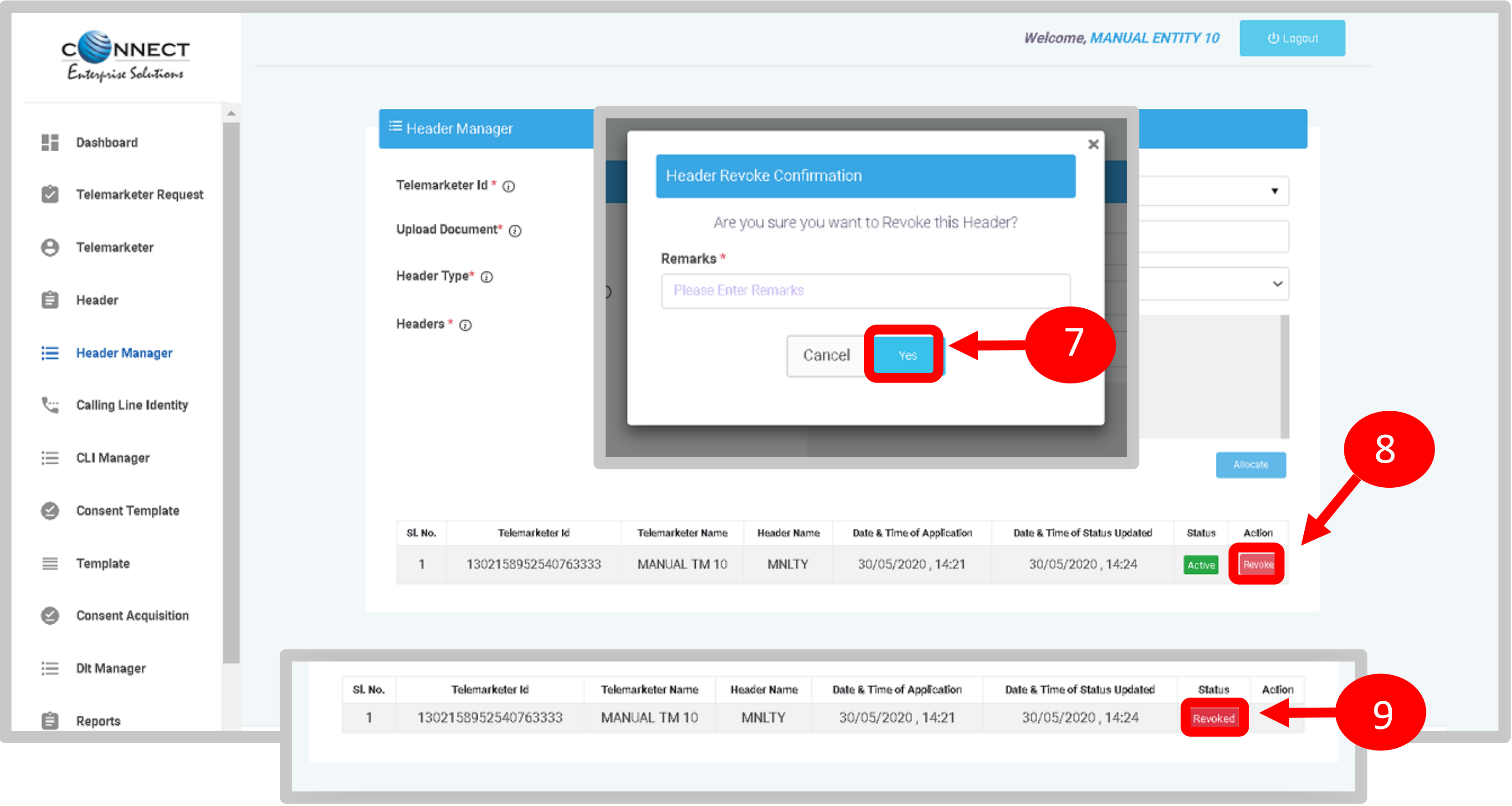
HEADER MANAGER – REVOCATION OF ALLOTED HEADERS

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.



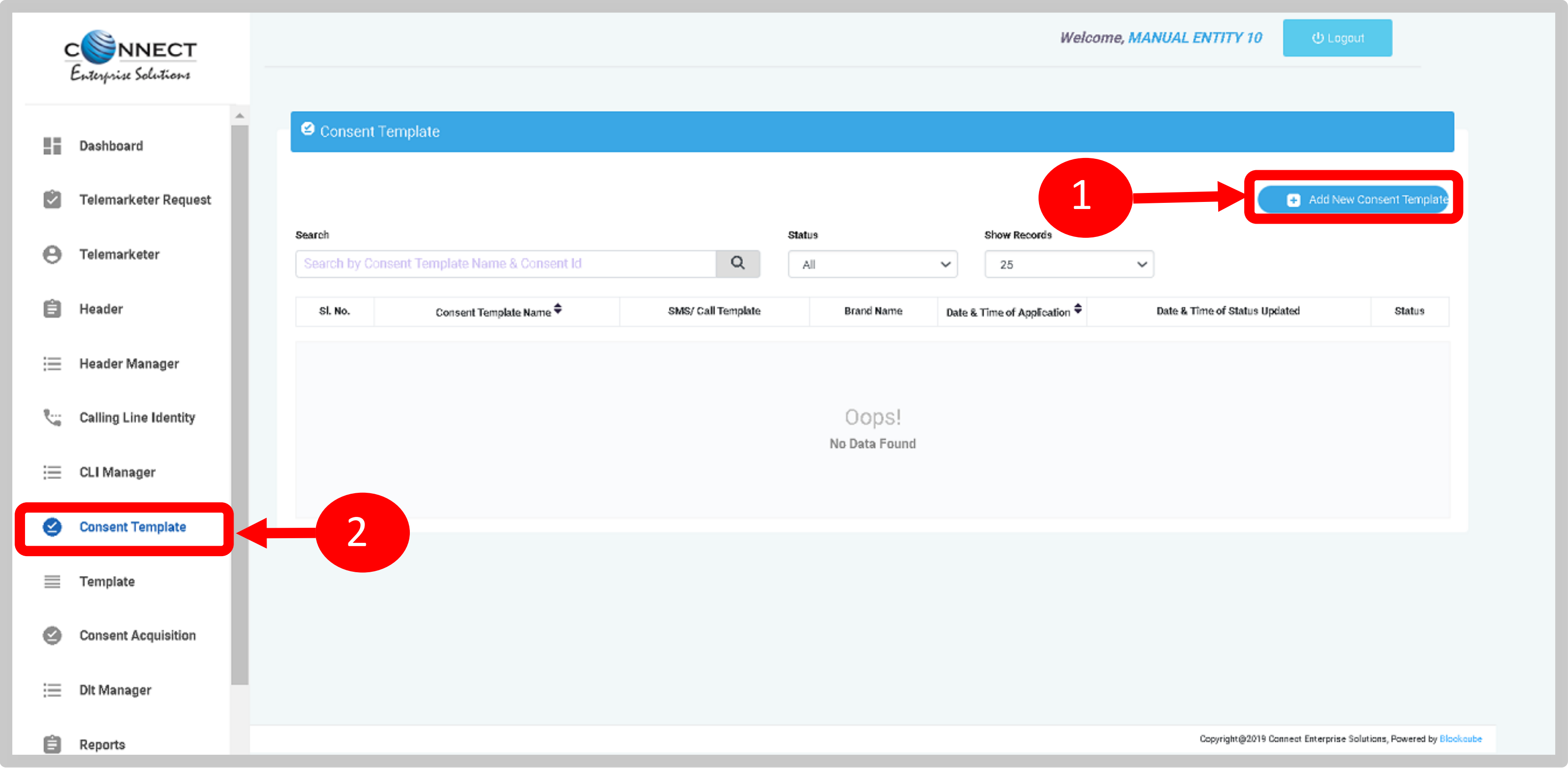
CONSENT TEMPLATE

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

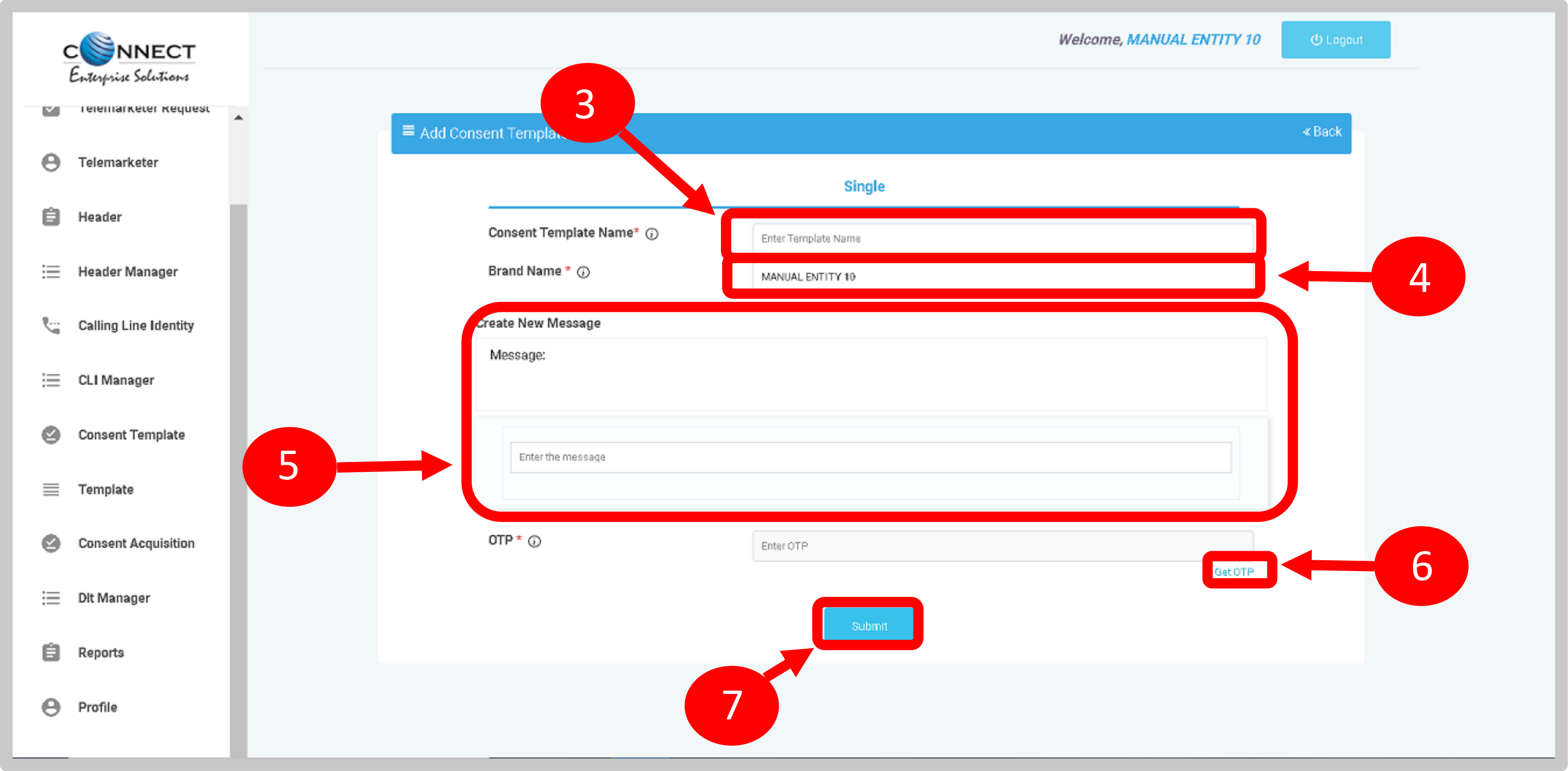
3 To create a New Consent Template, first type an a relevant **Consent Template Name** as per the Entity business requirement.

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.**

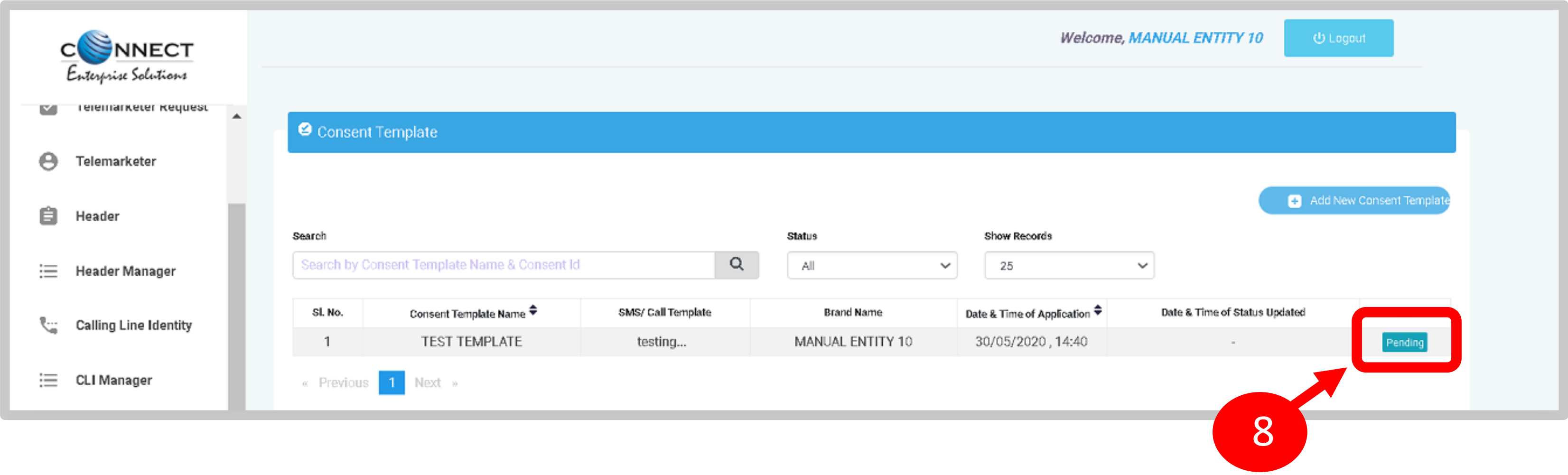
6 Once the content is created. Click on the **GET OTP** link, a One Time Password (OTP) will be sent to your registered mobile number. Authenticate the process by typing that OTP in the OTP column.

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

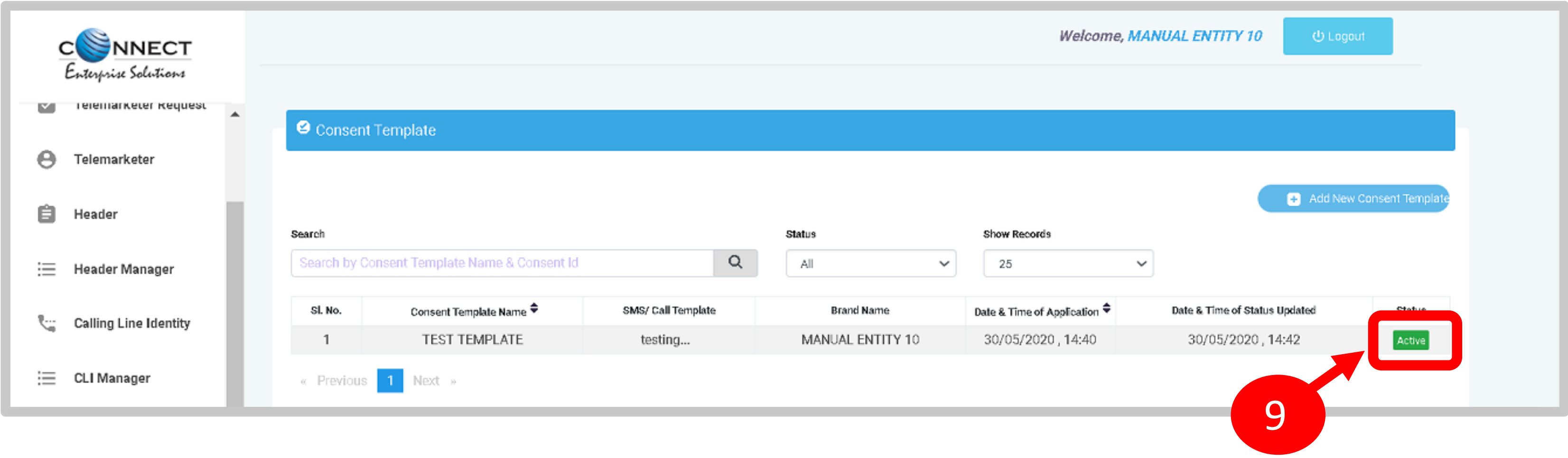


CONSENT TEMPLATE – REQUEST STATUS

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**.



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



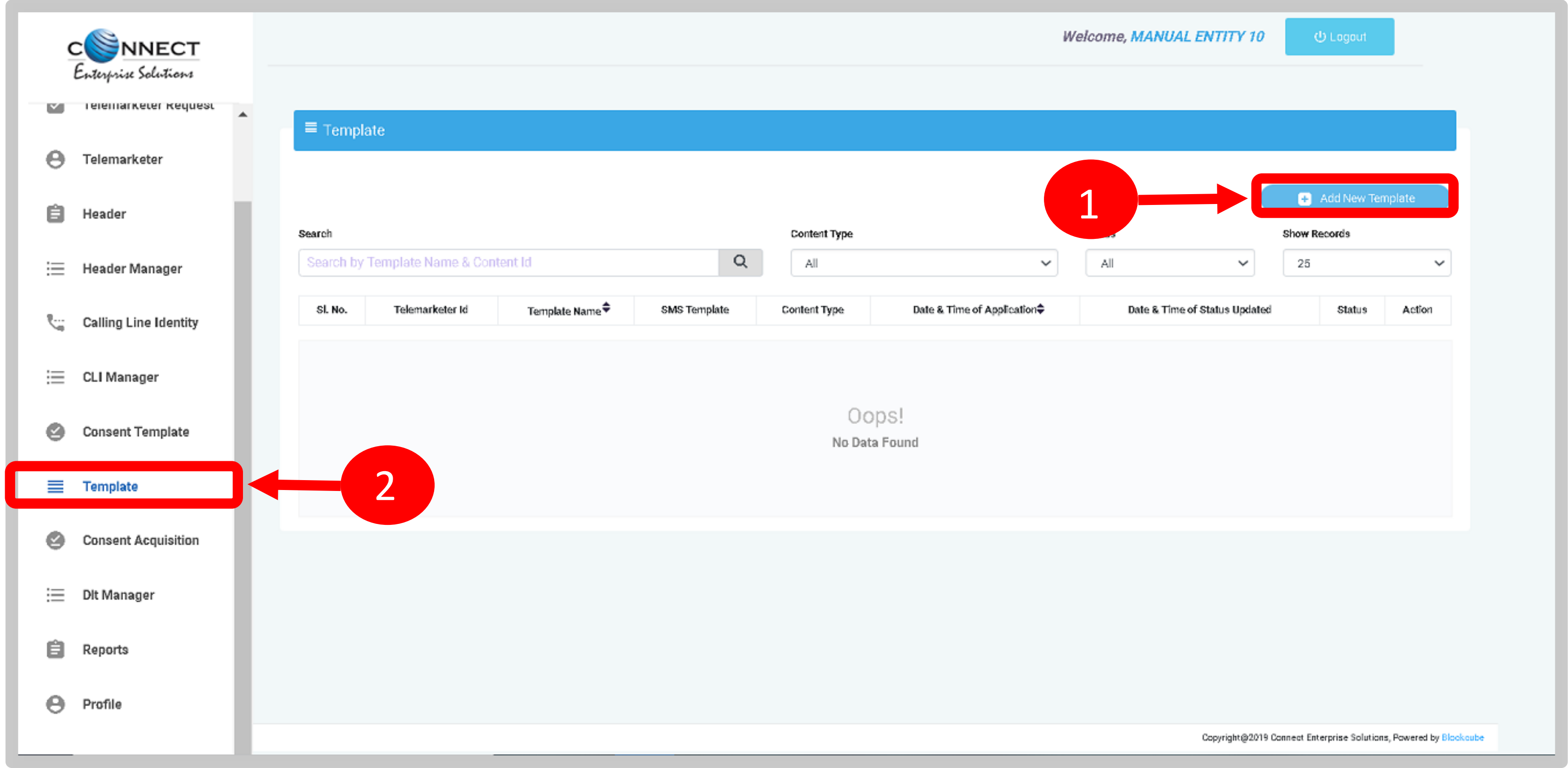
TEMPLATE
(CONTENT)

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

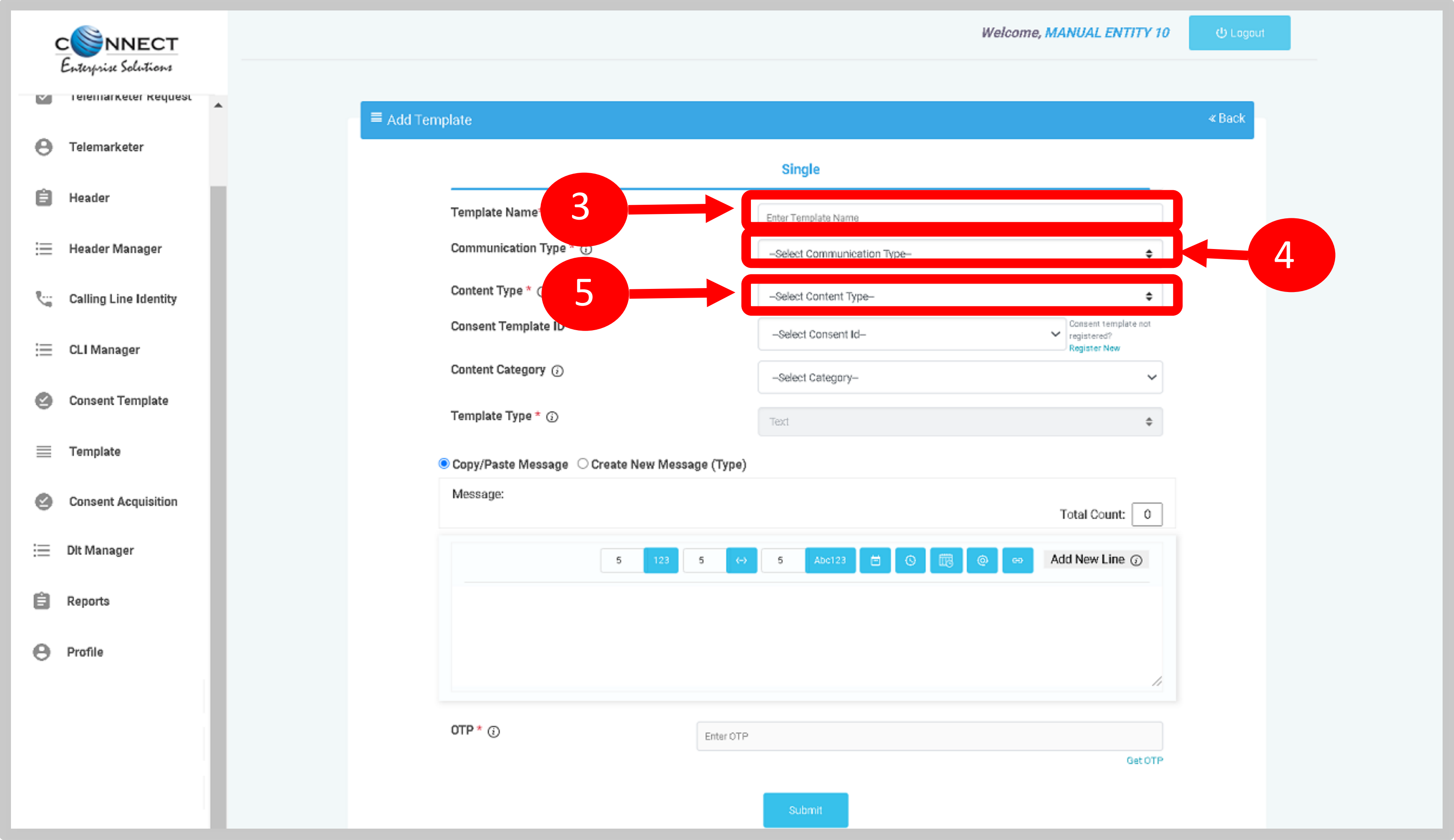
4 In the **Communication Type** column select the type of communication from the following:

- 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



TEMPLATE – SELECTION OF CONSENT TEMPLATE /CONTENT CATEGORY

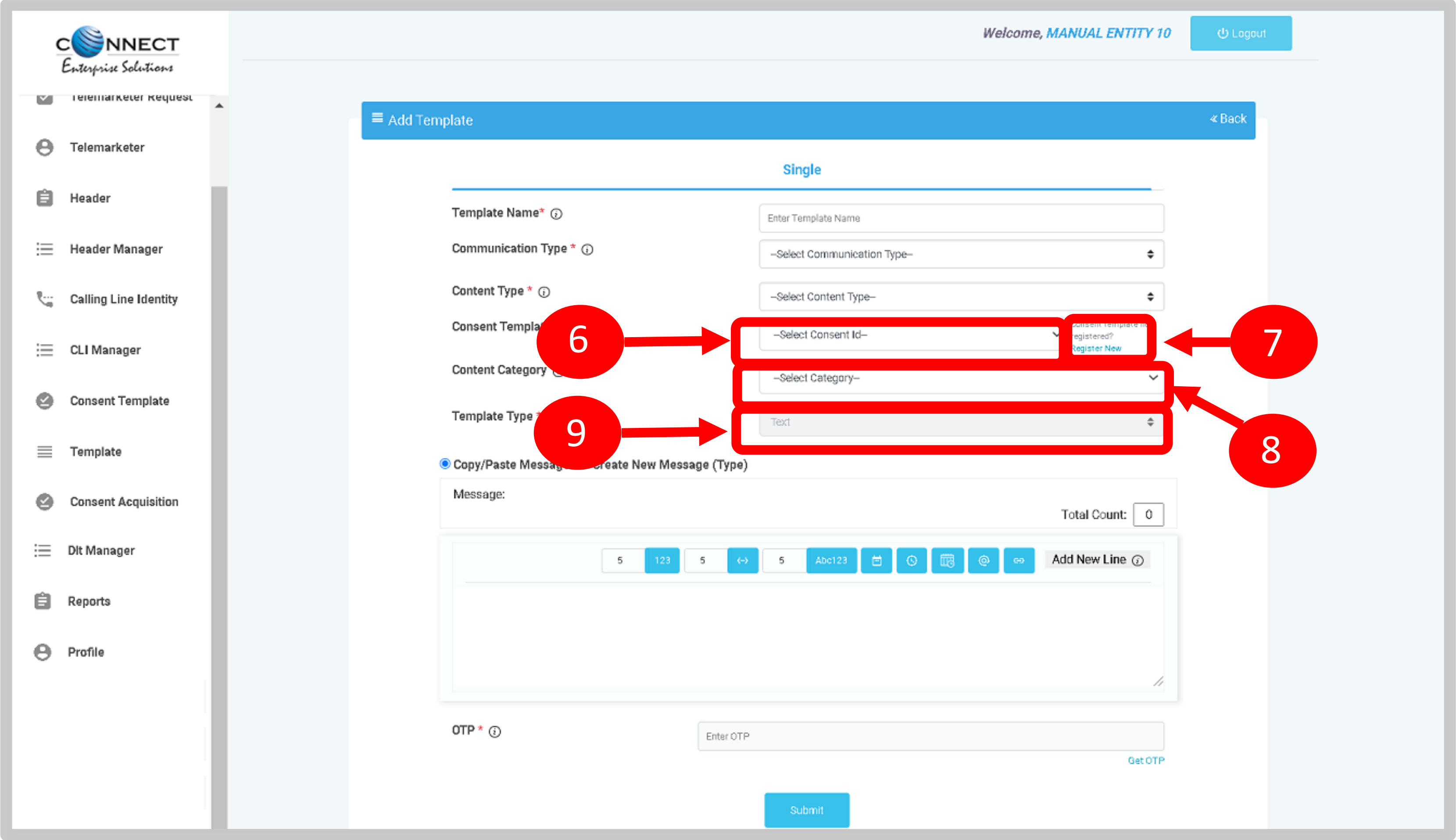
6 In the **Consent Template ID** column select the relevant Consent Template registered on DLT from the dropdown list.

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)*



TEMPLATE – CREATION OF CONTENT

In the Content creation section there are two options available:

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

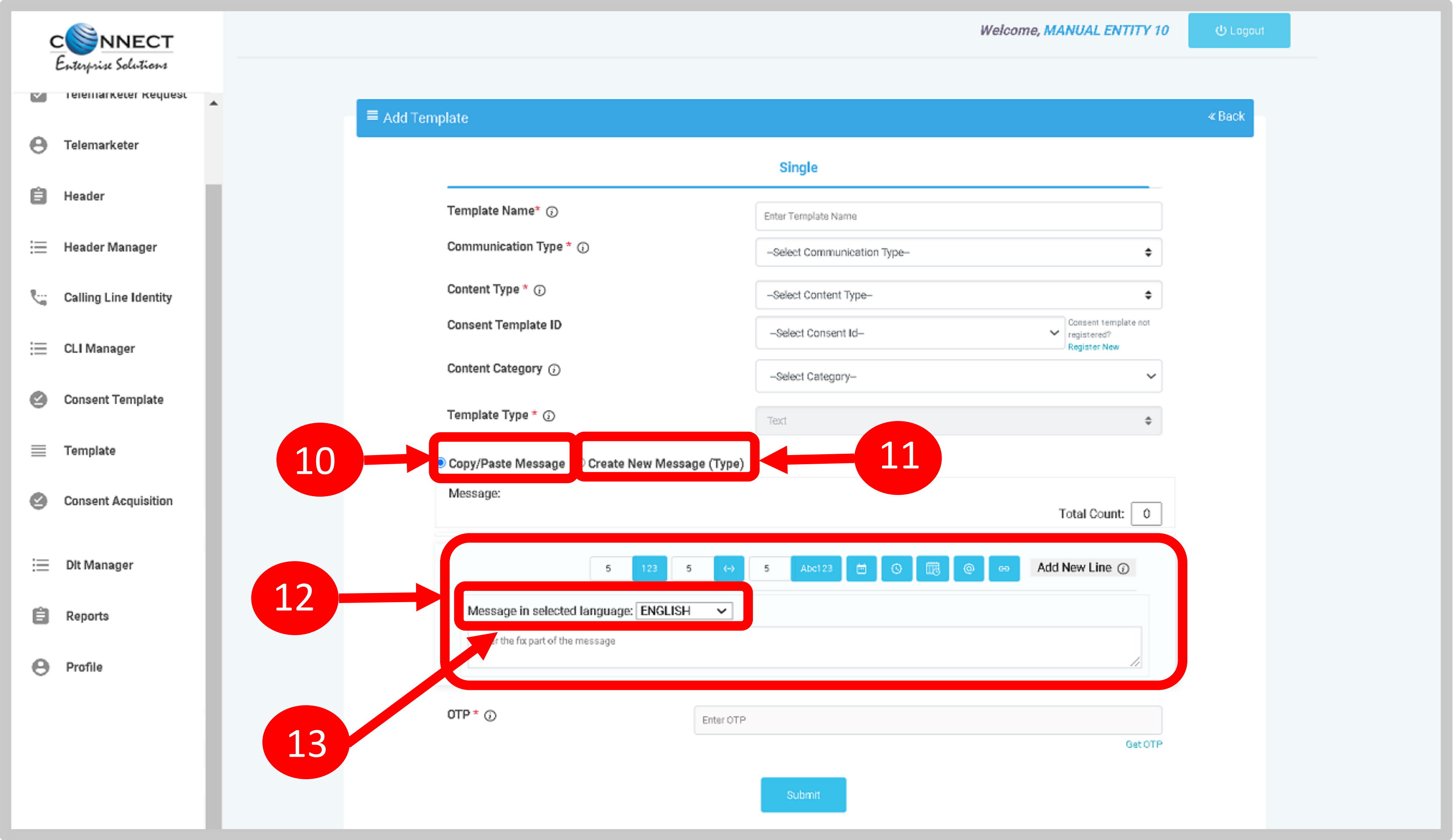
Select any of the option basis on the requirement of content creation.

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.

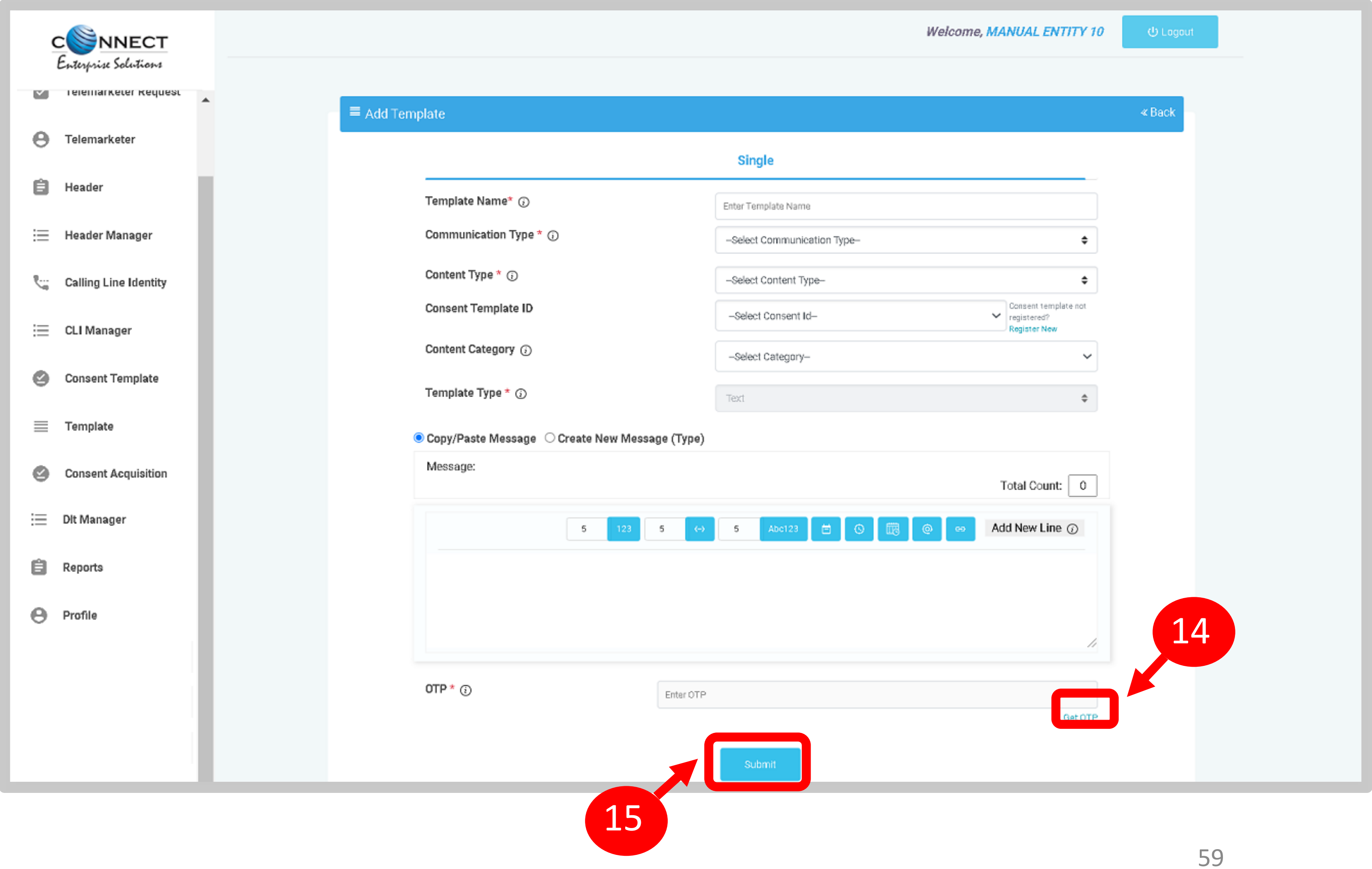
13 Messages in languages other than English can be created, such templates type will be treated as Unicode. Language can be selected from the dropdown list.



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.

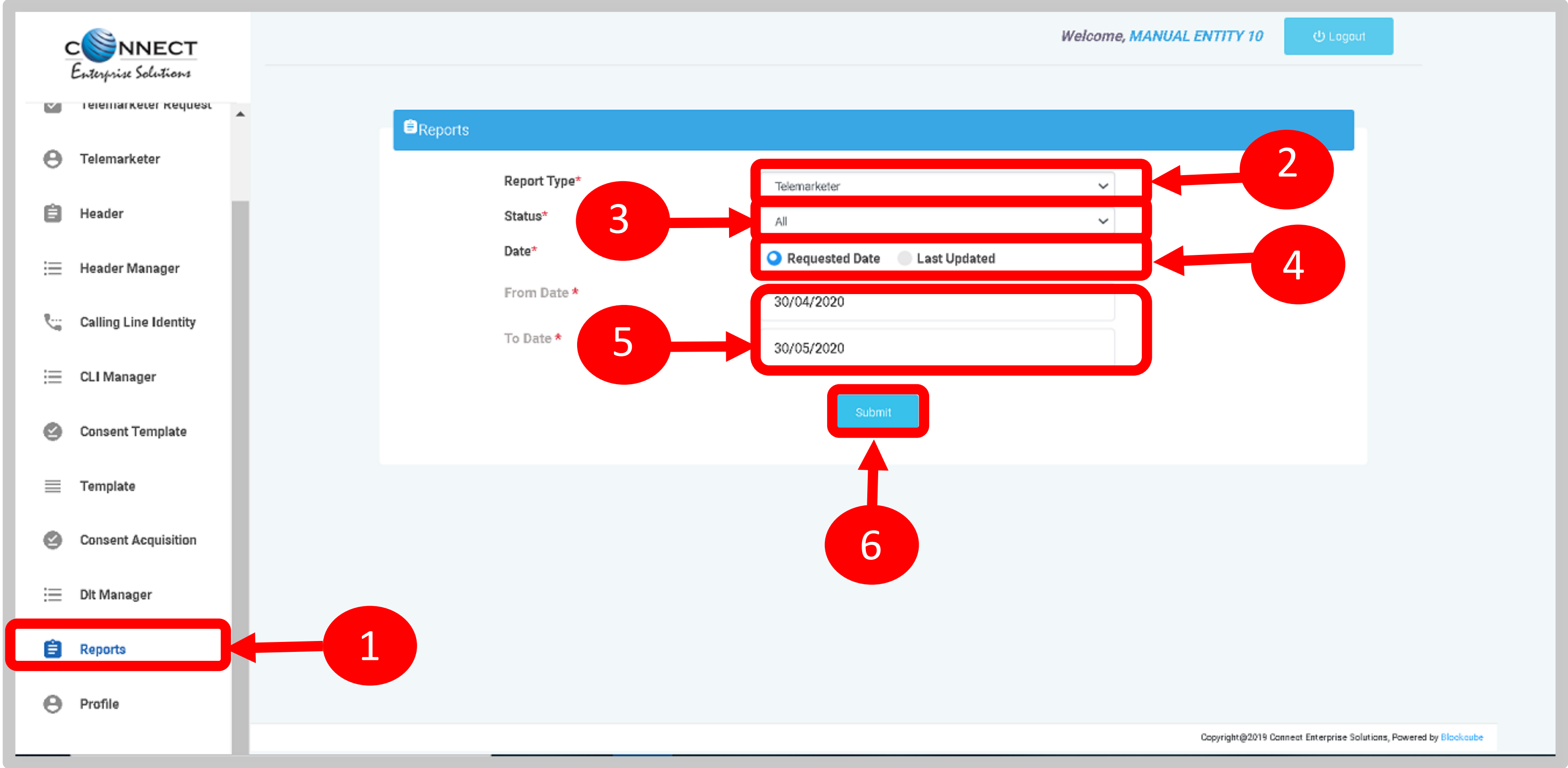
15 Press **Submit** button to confirm and send the request for approval by the Operator.



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

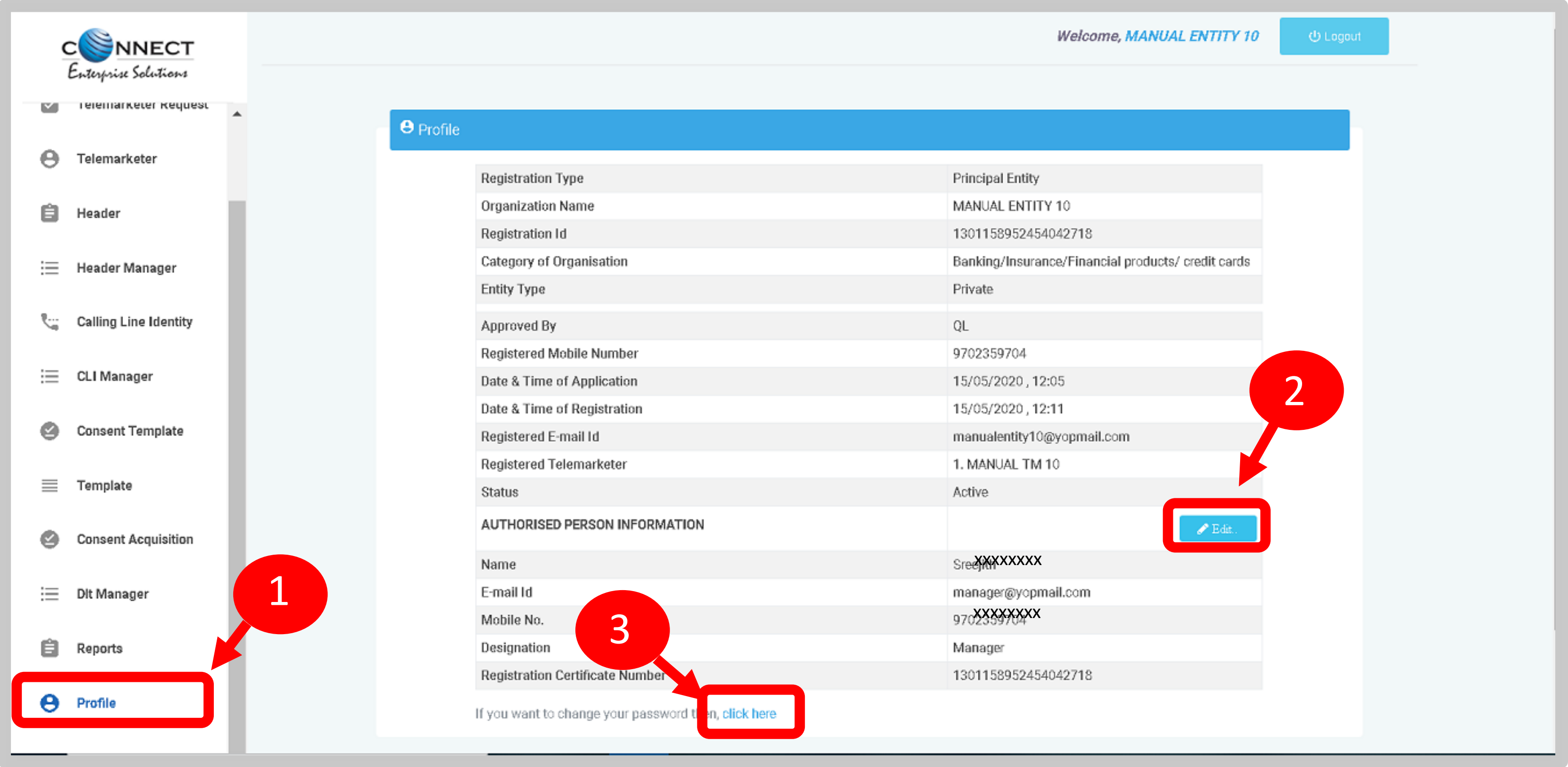
PROFILE PAGE

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.



PROFILE UPDATE PAGE

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

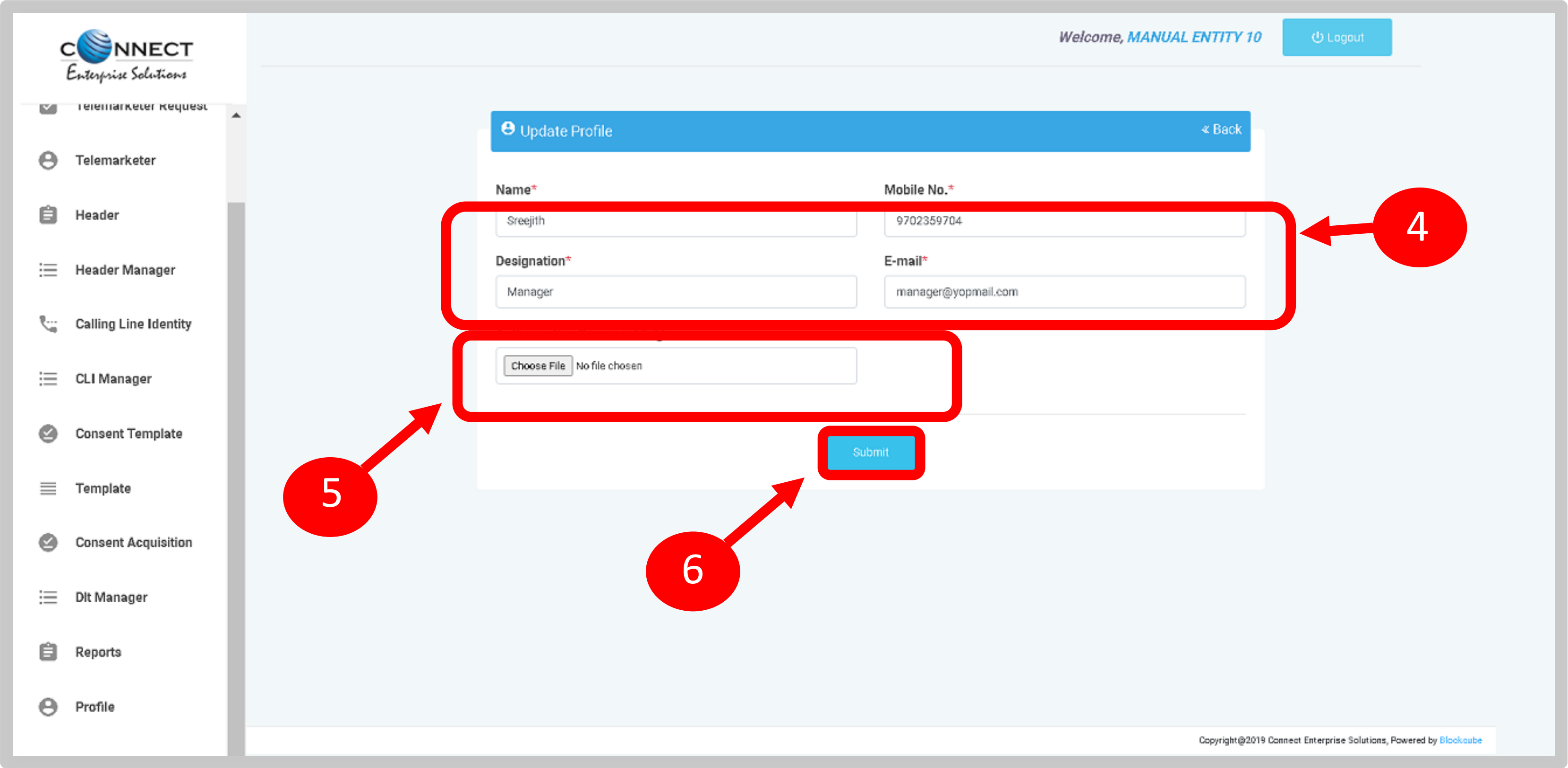
- Name of the Authorized Person
- Designation of the Authorized Person
- Mobile number of the Authorized Person
- Email ID of the Authorized Person

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.



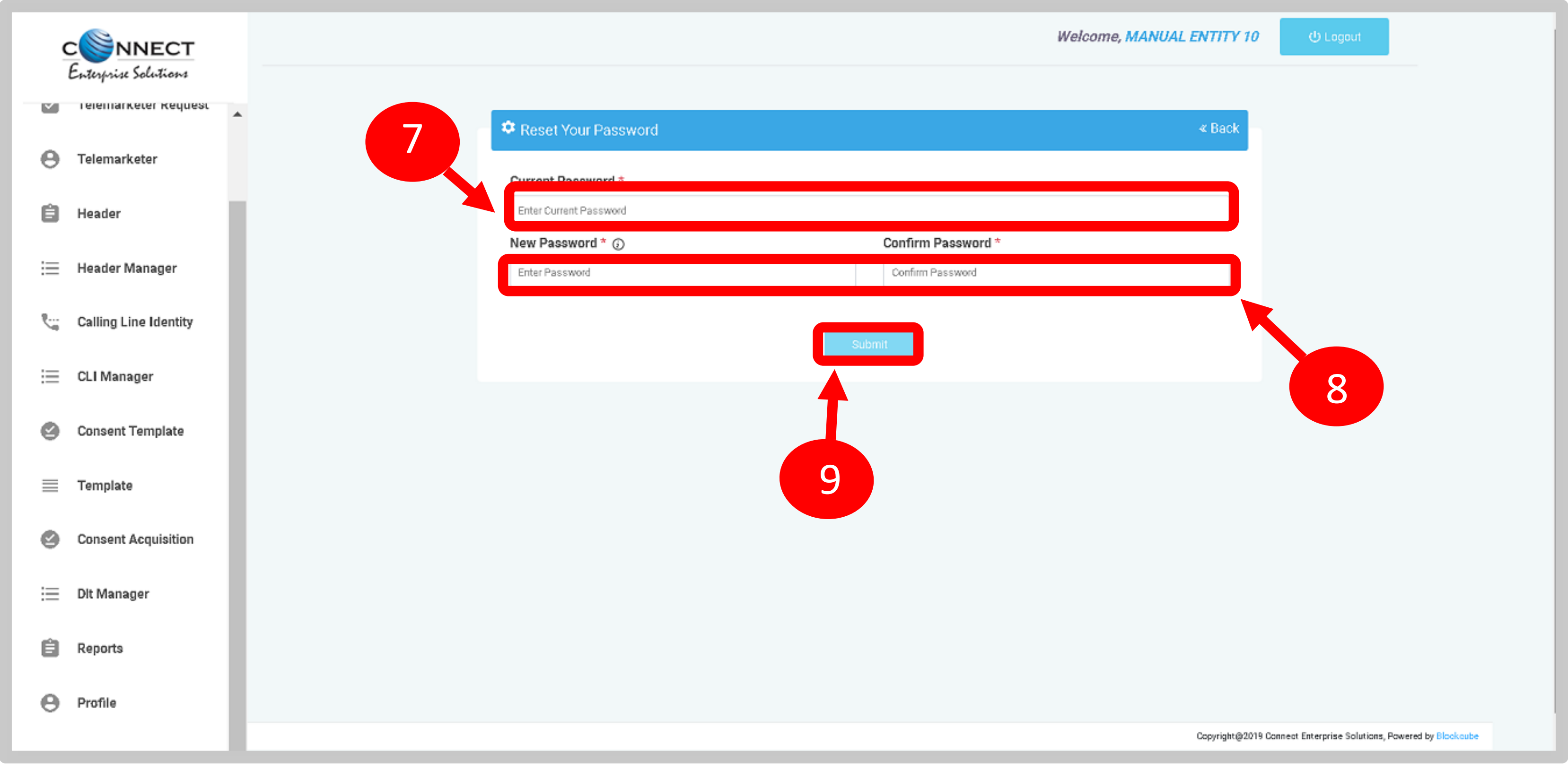
PROFILE – CHANGE PASSWORD

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 !