



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

✔

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

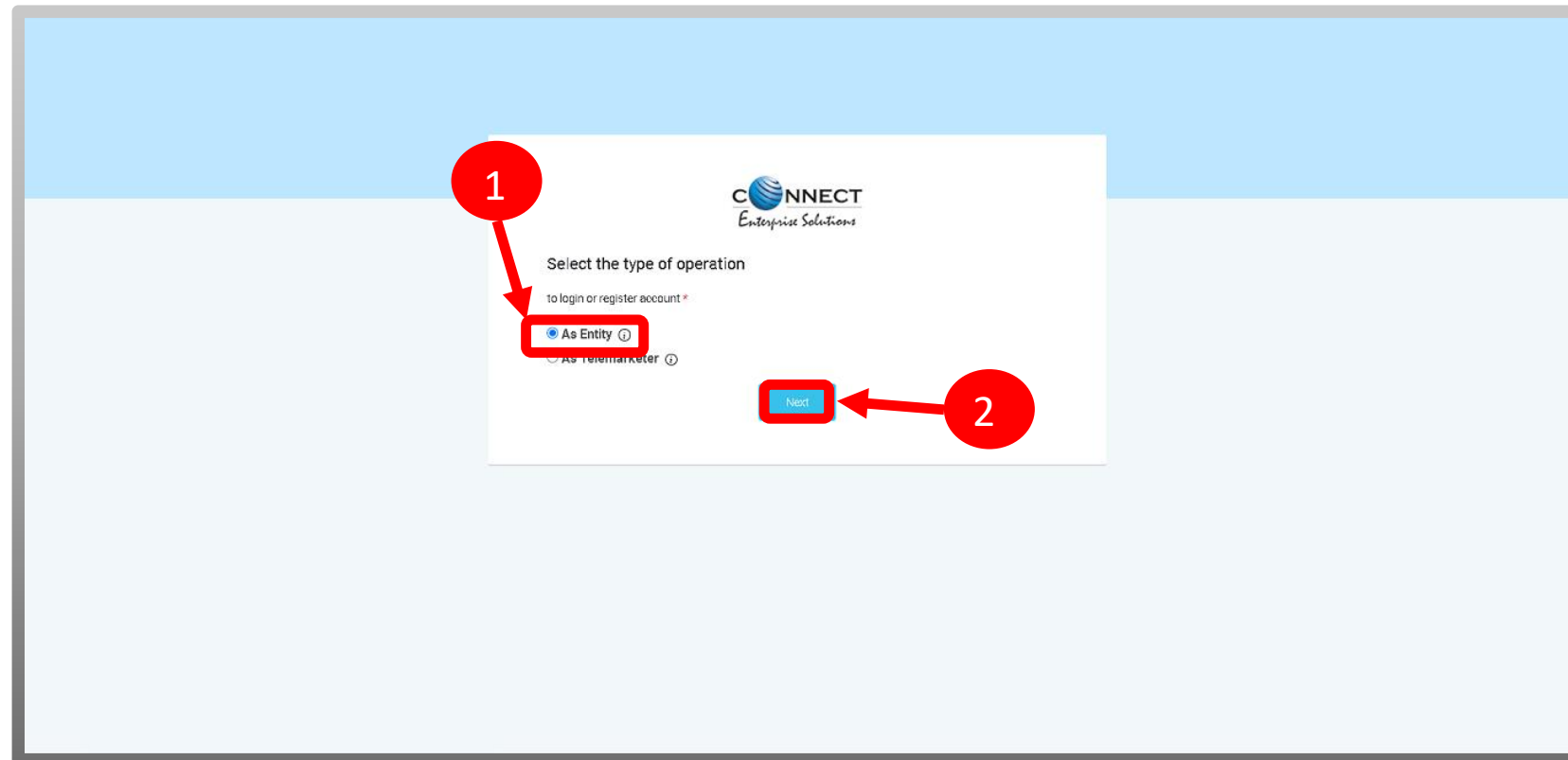
1 To register yourself as an Entity on the portal, select the “**As Entity**” option in the Type of Operation.



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 /SIGNUP 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.)

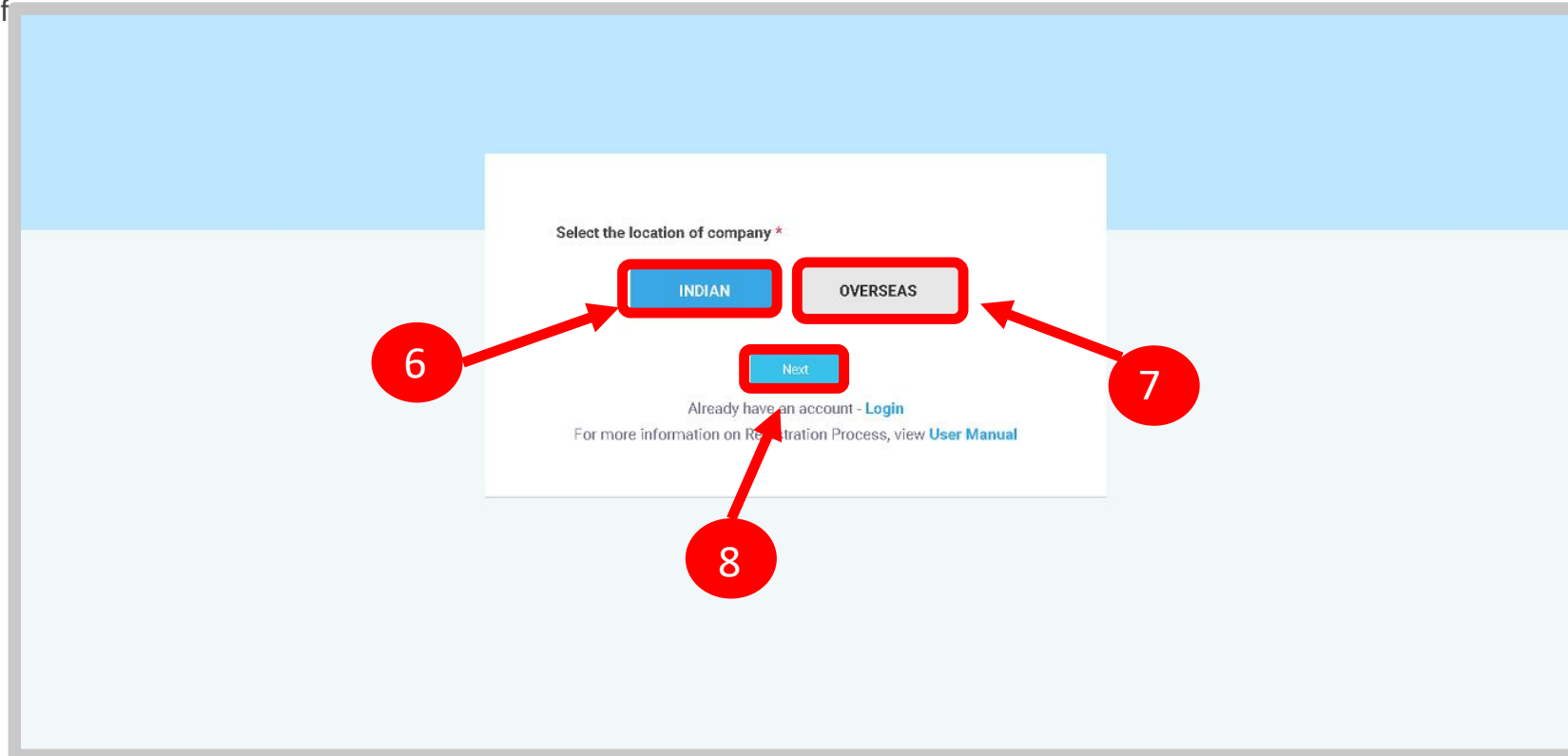


REGISTRATION - SELECT COMPANY LOCATION

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.



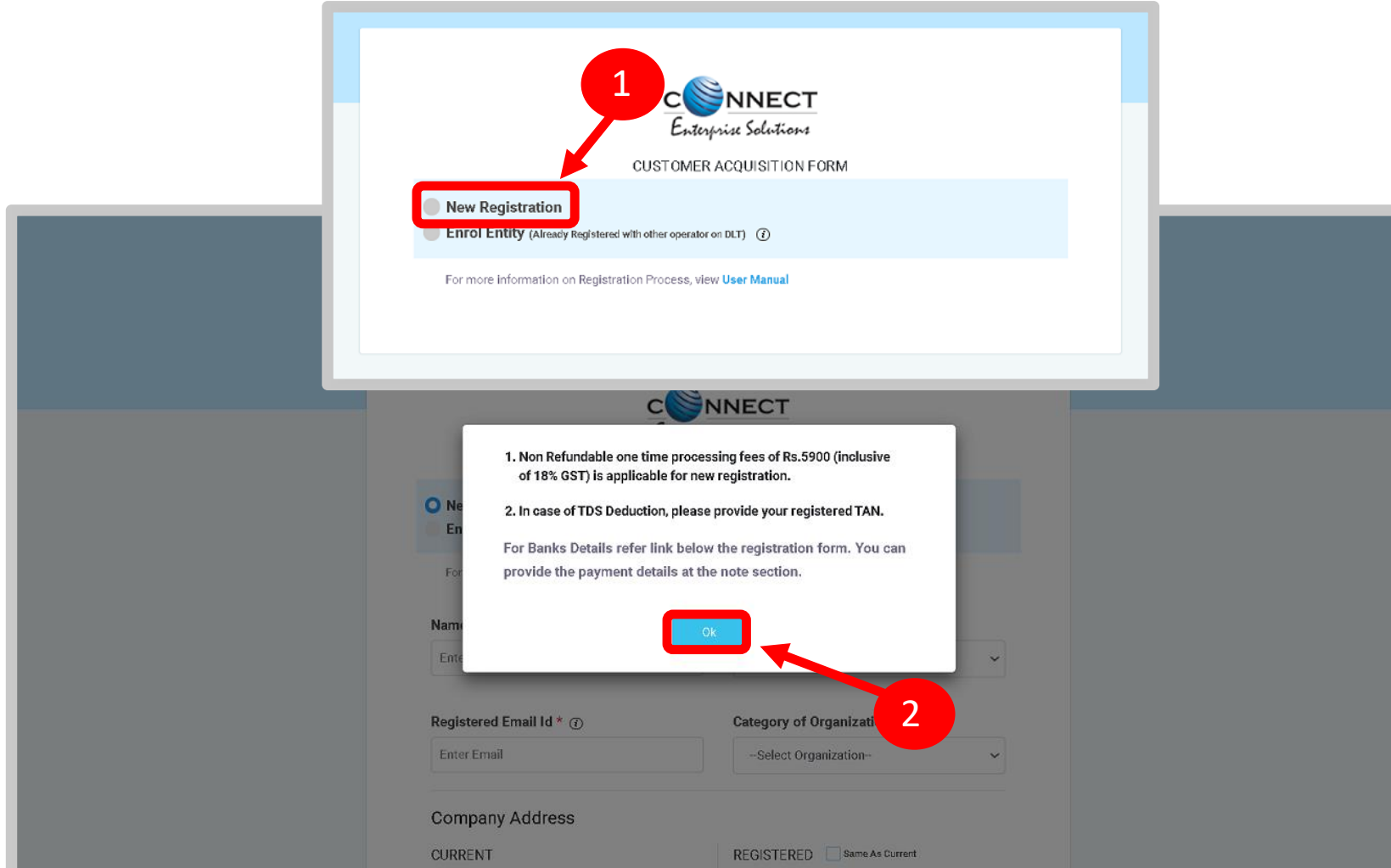
NEW ENTITY REGISTRATION

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

A modal dialog box is overlaid on the form, containing the following text:

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

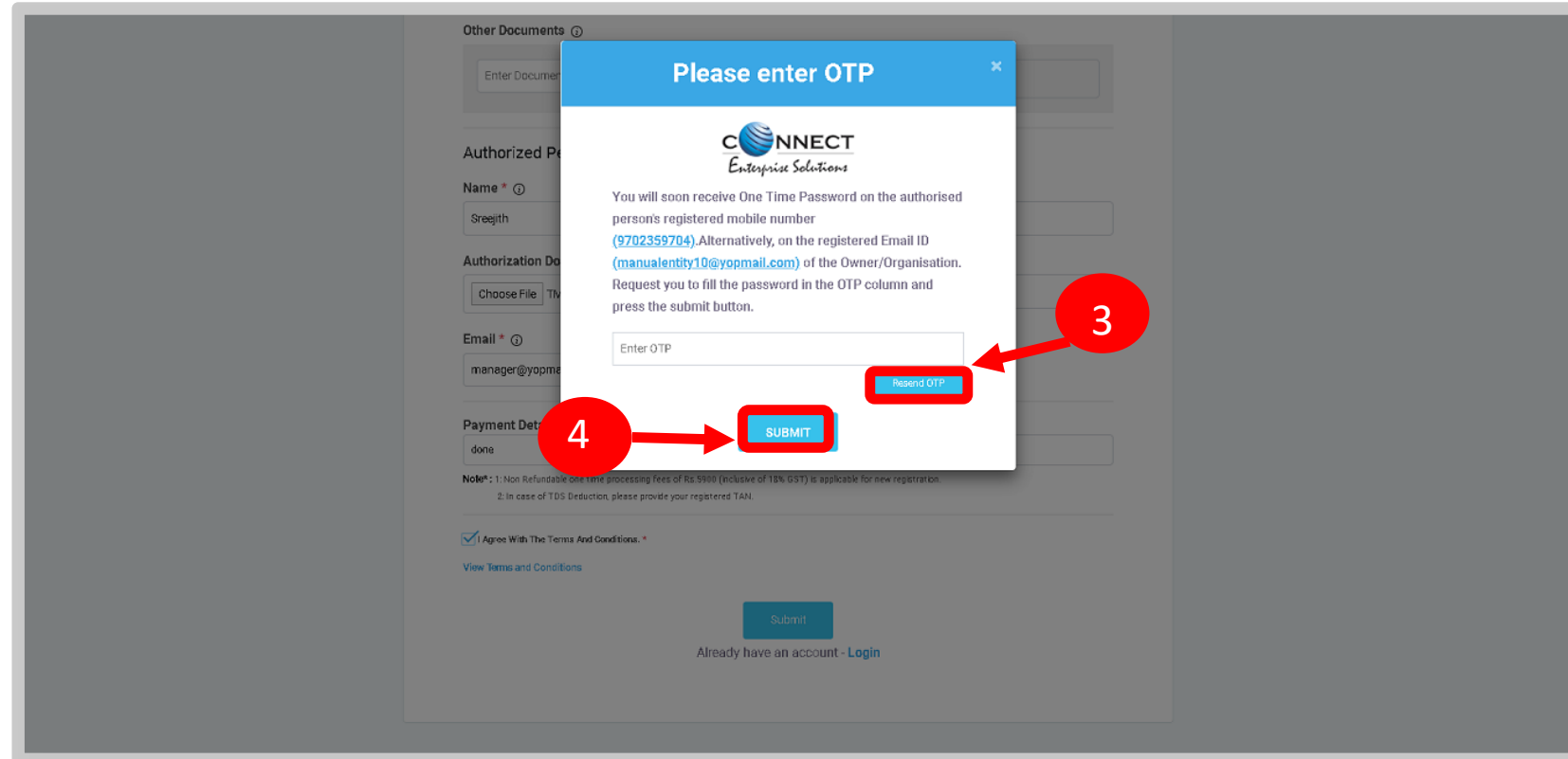
 Below the text, it states: 'For Banks Details refer link below the registration form. You can provide the payment details at the note section.' At the bottom of the dialog, there is an 'Ok' button highlighted with a red box and a red circle containing the number '2'.

The background form includes fields for 'Registered Email Id *', 'Category of Organization', 'Company Address', and a 'REGISTERED' checkbox with a 'Same As Current' option.

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.

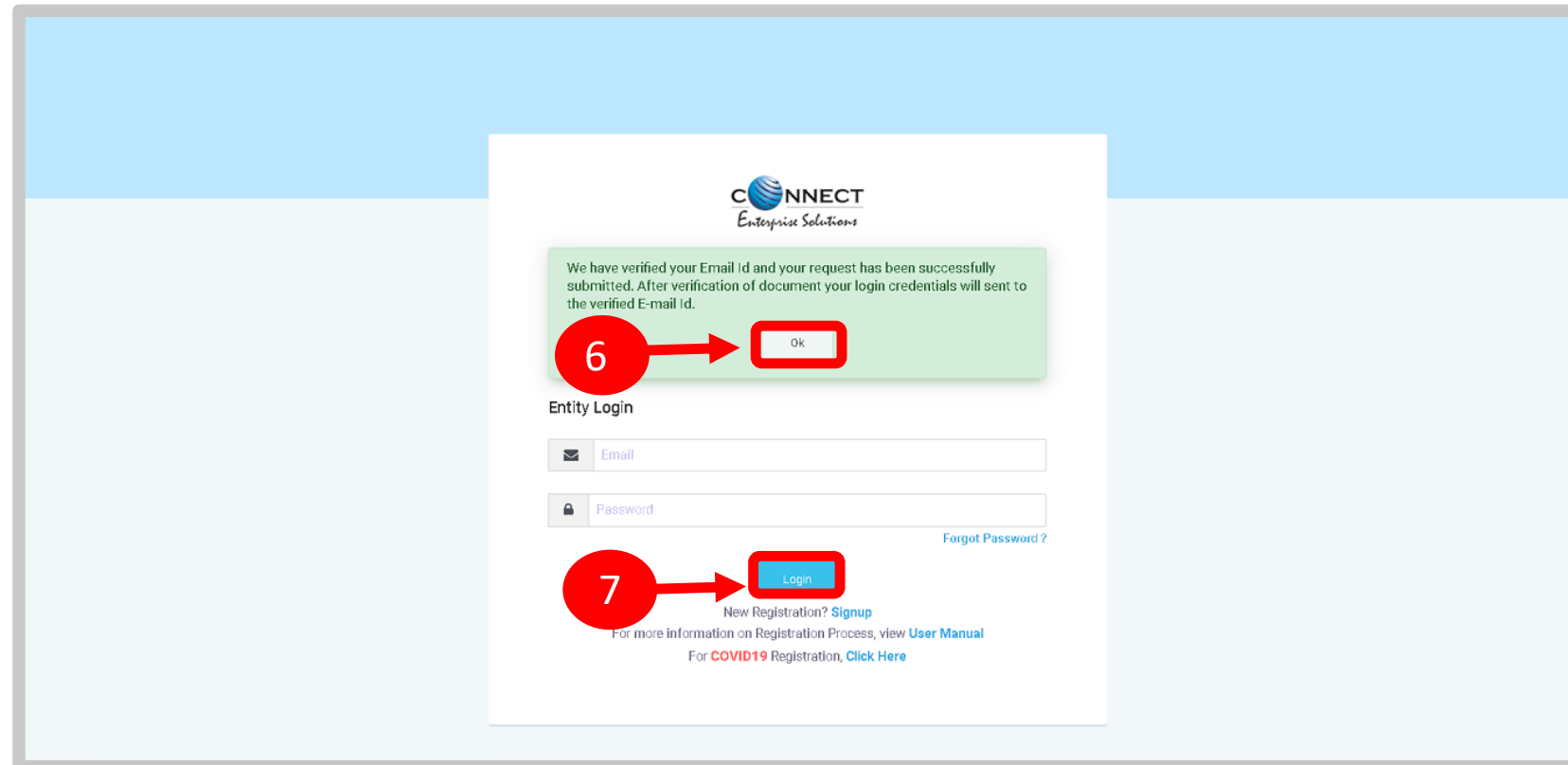
The screenshot displays a registration form with several sections: 'Other Documents' (with a green success message 'OTP verified successfully'), 'Authorized Person Information' (with fields for Name and Mobile No.), 'Authorization Document' (with a 'Choose File' button), 'Email' (with an 'Enter Email' field), and 'Payment Details' (with a 'Please provide the payment details' field). A modal dialog box is overlaid on the form, containing the text: '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.' The dialog has an 'OK' button. A red circle with the number '5' and an arrow points to the 'OK' button. At the bottom of the form, there is a 'Submit' button and a link for '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**

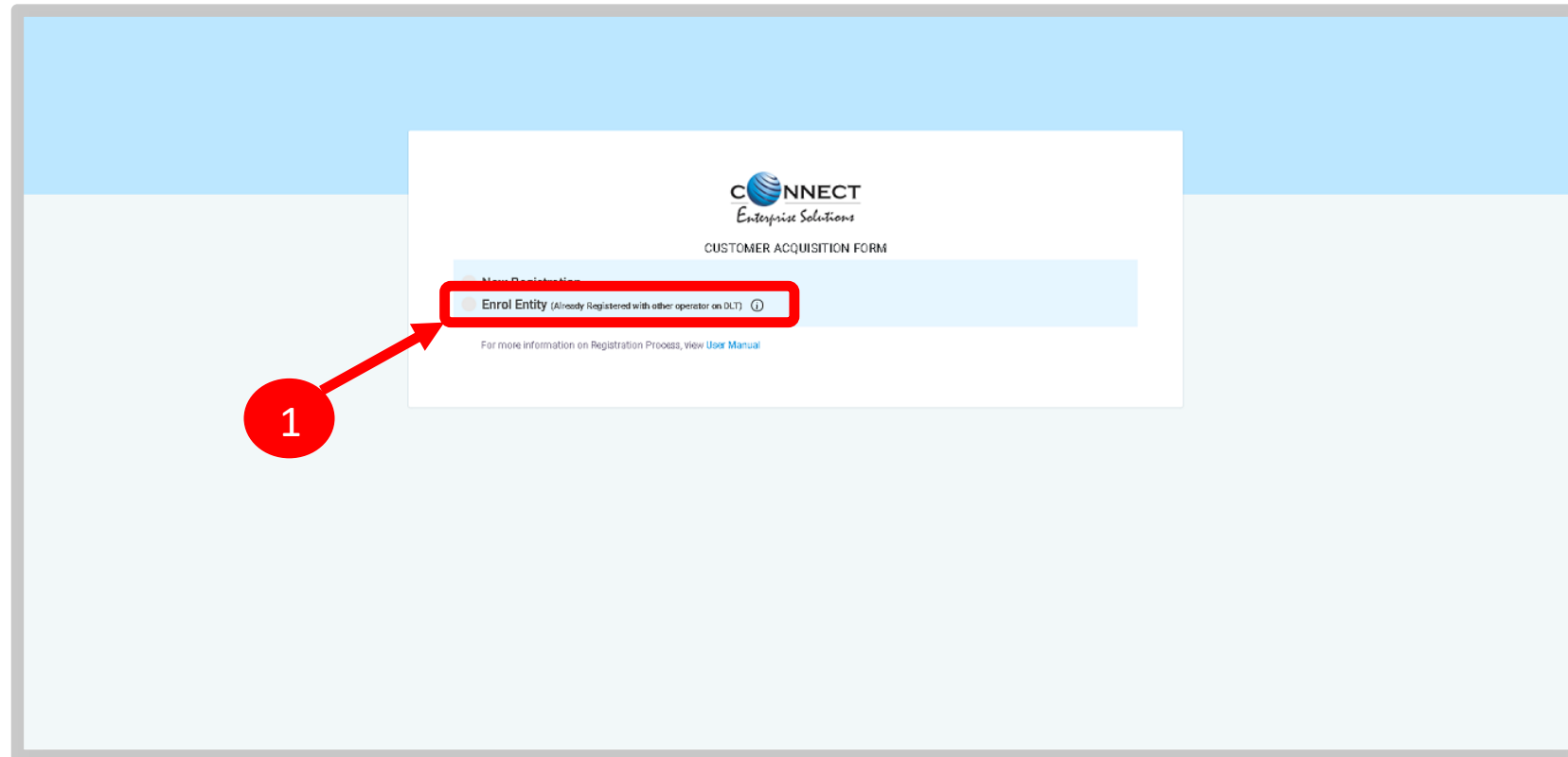


ENROL ENTITY (ALREADY REGISTERED)

ENTITY ENROLMENT – INITIATION

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

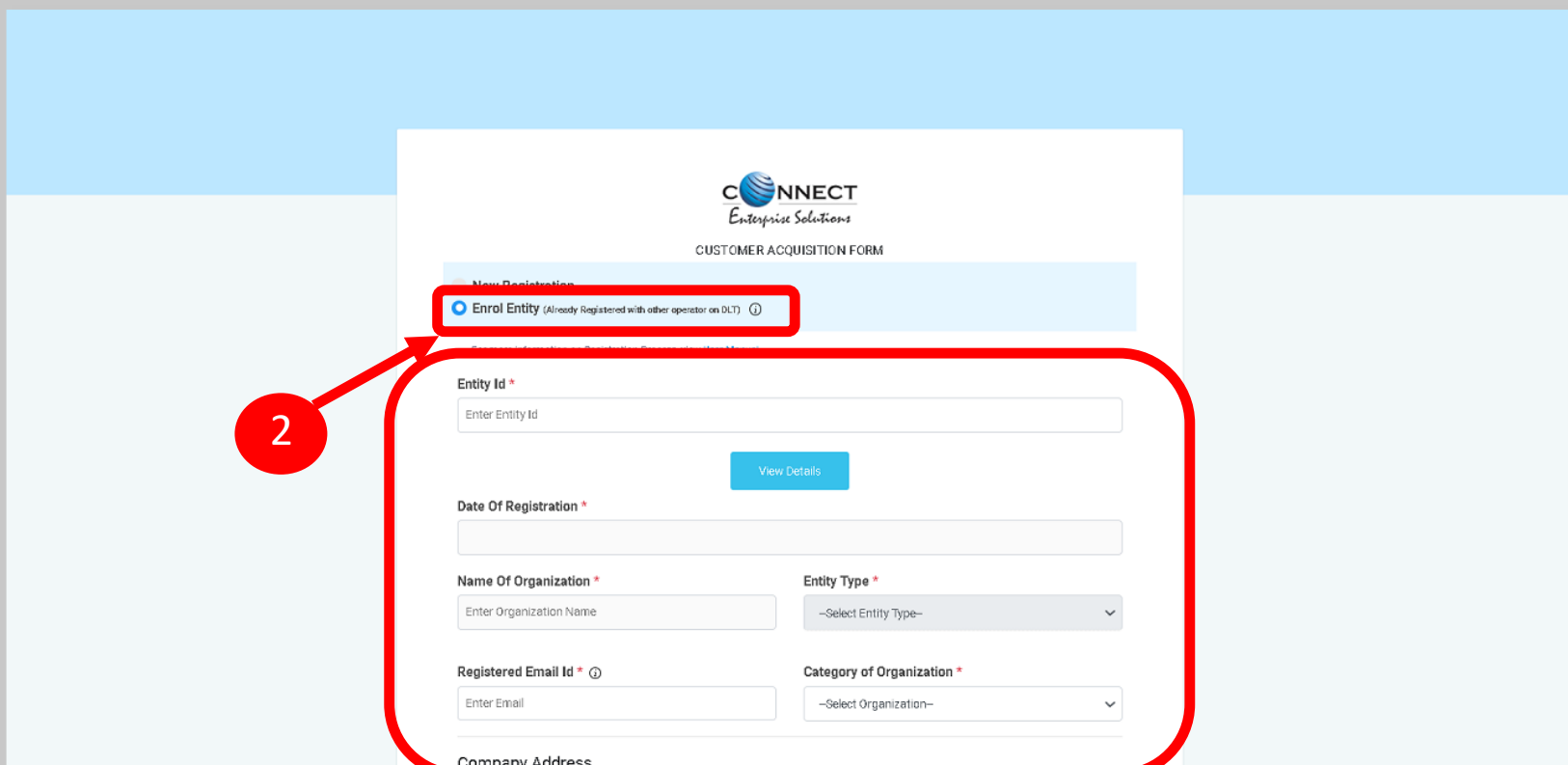
i *Entity already registered with other operator on DLT can enrol by providing Entity ID (DLT Registration Number)*



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

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



The screenshot displays the 'CUSTOMER ACQUISITION FORM' interface. At the top, the 'CONNECT Enterprise Solutions' logo is visible. Below the logo, the text 'CUSTOMER ACQUISITION FORM' is centered. Underneath, there is a section for 'New Registration' with two radio button options: 'Enrol Entity (Already Registered with other operator on DLT)' and another option. The 'Enrol Entity' option is selected and highlighted with a red box. Below this, a red circle with the number '2' has an arrow pointing to the 'Enrol Entity' option. The form fields are as follows:

- Entity Id ***: A text input field with the placeholder text 'Enter Entity Id'.
- Date Of Registration ***: A date selection field.
- Name Of Organization ***: A text input field with the placeholder text 'Enter Organization Name'.
- Entity Type ***: A dropdown menu with the placeholder text '-Select Entity Type-'.
- Registered Email Id * ⓘ**: A text input field with the placeholder text 'Enter Email'.
- Category of Organization ***: A dropdown menu with the placeholder text '-Select Organization-'.
- Company Address**: A text area for entering the address.

A blue 'View Details' button is located below the 'Entity Id' field. A red circle with the number '3' has an arrow pointing to the 'View Details' button.

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

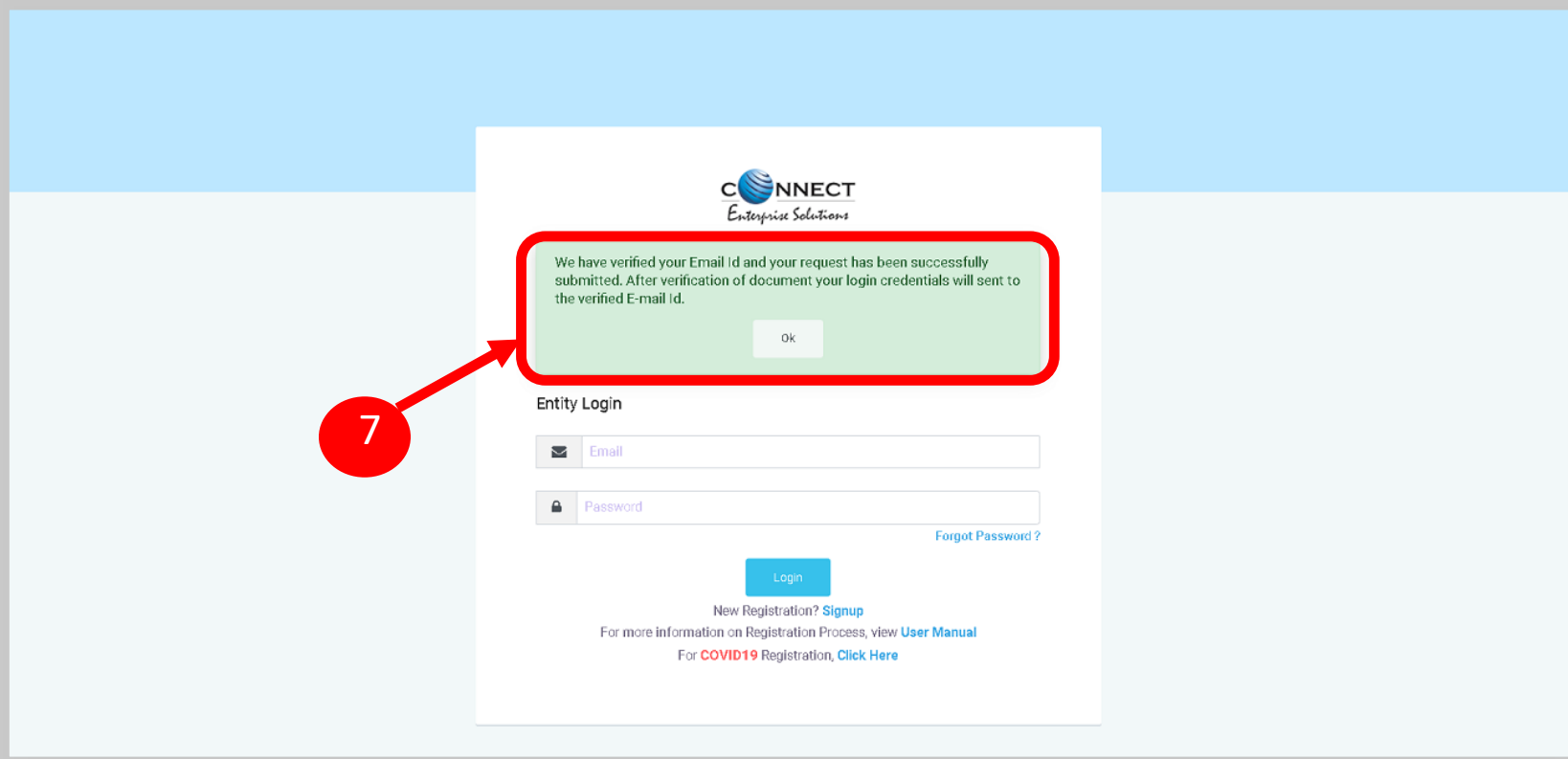
6 After verifying OTP, a verification link will be sent to your registered email Id.
Click **OK** button once you read the message and validate your mail by clicking the verification link received on your registered email id.

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.



The screenshot displays the 'Entity Login' interface. At the top, the CONNECT Enterprise Solutions logo is visible. A green confirmation message box is highlighted with a red border and a red arrow pointing to it from a red circle containing the number '7'. The message reads: 'We have verified your Email Id and your request has been successfully submitted. After verification of document your login credentials will sent to the verified E-mail Id.' Below the message is an 'OK' button. Underneath the message is the 'Entity Login' form, which includes an 'Email' input field, a 'Password' input field, and a 'Forgot Password?' link. A blue 'Login' button is positioned below the form. At the bottom of the page, there are links for 'New Registration? Signup', 'For more information on Registration Process, view User Manual', and 'For COVID19 Registration, Click Here'.

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.

CONNECT
Enterprise Solutions

Entity Login

Email

Password

Login

New Registration? [Signup](#)

For more information on Registration Process, view [User Manual](#)

For **COVID19** Registration, [Click Here](#)

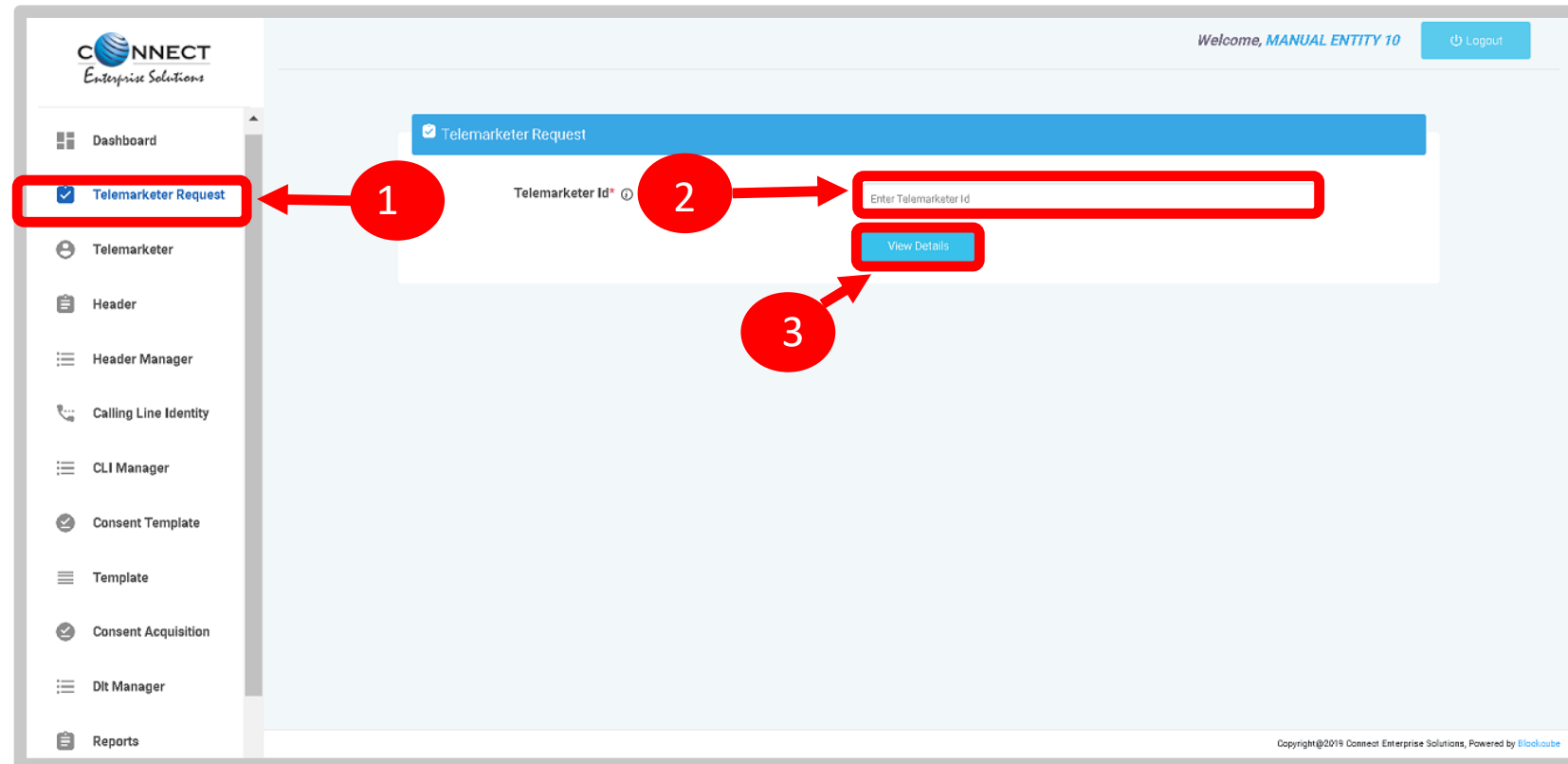
ENTITY – TELEMARKETER REQUEST

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**

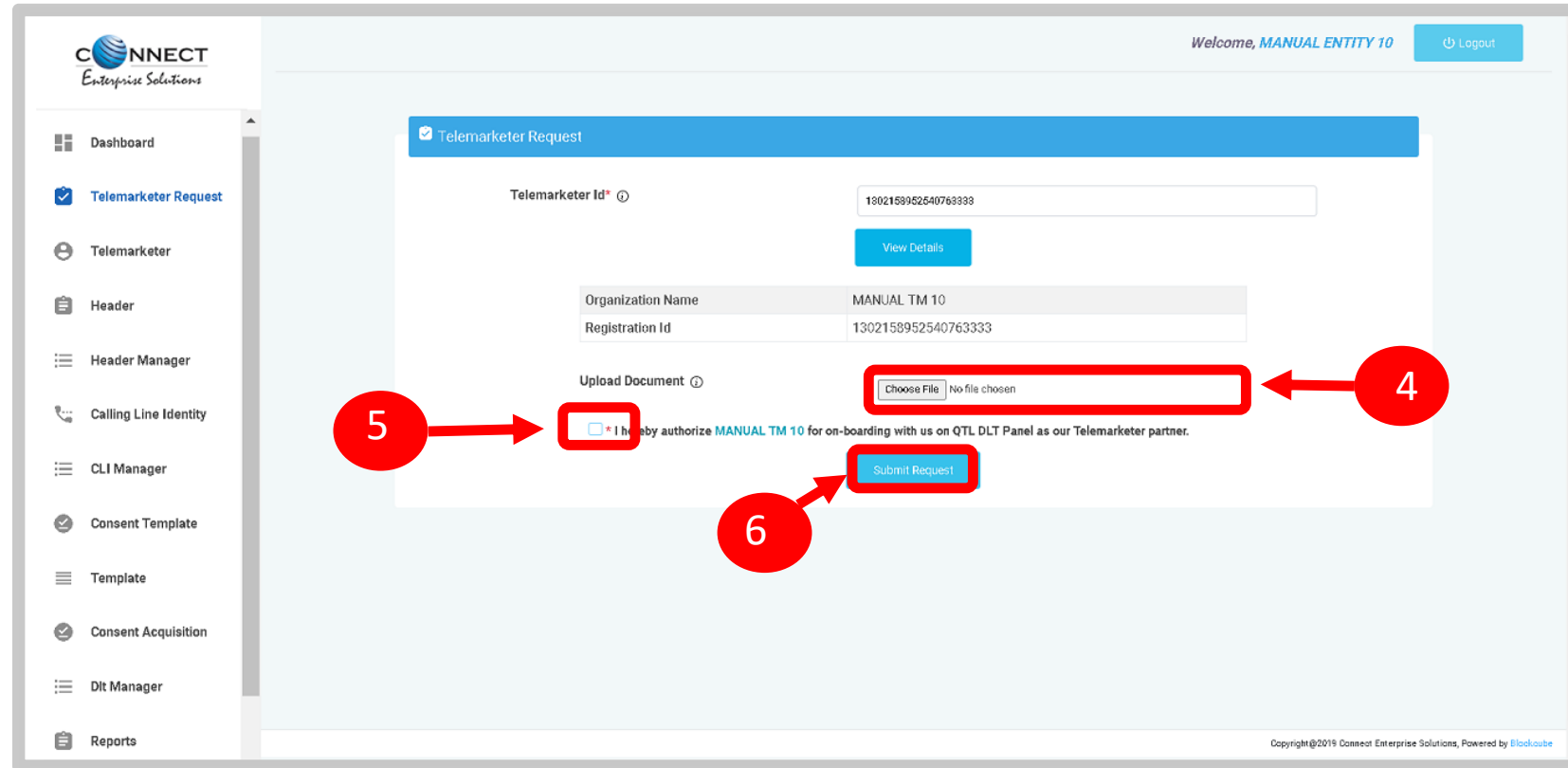


TELEMARKETER REQUEST – REQUEST SUBMISSION

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 CONNECT 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, Dlt Manager, and Reports. The main form area contains the following elements:

- Telemarketer Id***: Input field with value '1302158952540763333' and a 'View Details' button.
- Organization Name**: 'MANUAL TM 10'
- Registration Id**: '1302158952540763333'
- Upload Document**: A 'Choose File' button with 'No file chosen' text. A red box labeled '4' highlights this area.
- Authorization checkbox**: A checkbox labeled 'I hereby authorize MANUAL TM 10 for on-boarding with us on QTL DLT Panel as our Telemarketer partner.' A red box labeled '5' highlights this checkbox.
- Submit Request**: A blue button. A red box labeled '6' highlights this button.

At the bottom right of the page, there is a small copyright notice: 'Copyright ©2019 Connect Enterprise Solutions, Powered by Blockcube'.

TELEMARKETER REQUEST – REQUEST STATUS

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

The screenshot shows the 'List Of Telemarketers' interface. The 'Pending Telemarketers' tab is selected and highlighted with a red box. A red circle with the number 7 points to the search bar. The search bar contains the text 'Search by Telemarketer Id & Name'. Below the search bar, there is a table with the following data:

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.

The screenshot shows the 'List Of Telemarketers' interface. The 'Approved Telemarketers' tab is selected and highlighted with a red box. A red circle with the number 8 points to the search bar. The search bar contains the text 'Search by Telemarketer Id & Name'. Below the search bar, there is a table with the following data:

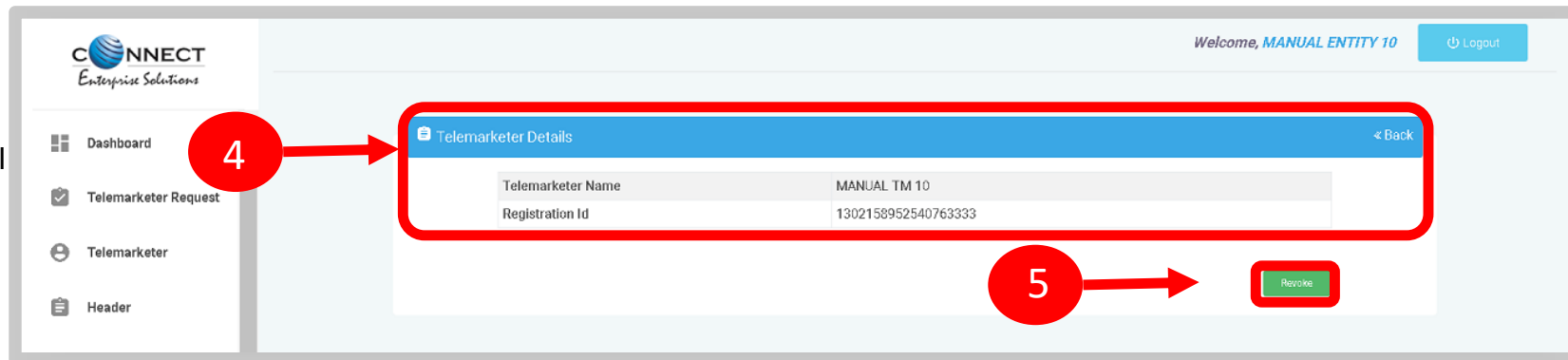
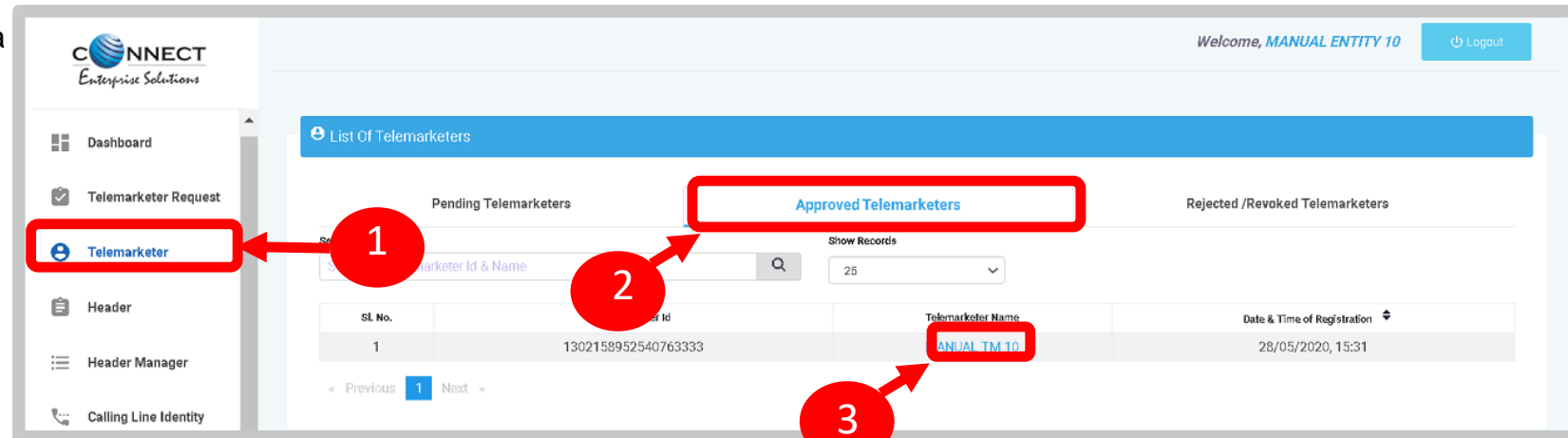
Sl. No.	Telemarketer Id	Telemarketer Name	Date & Time of Registration
1	1302158952540763333	MANUAL TM 10	28/05/2020, 15:31

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

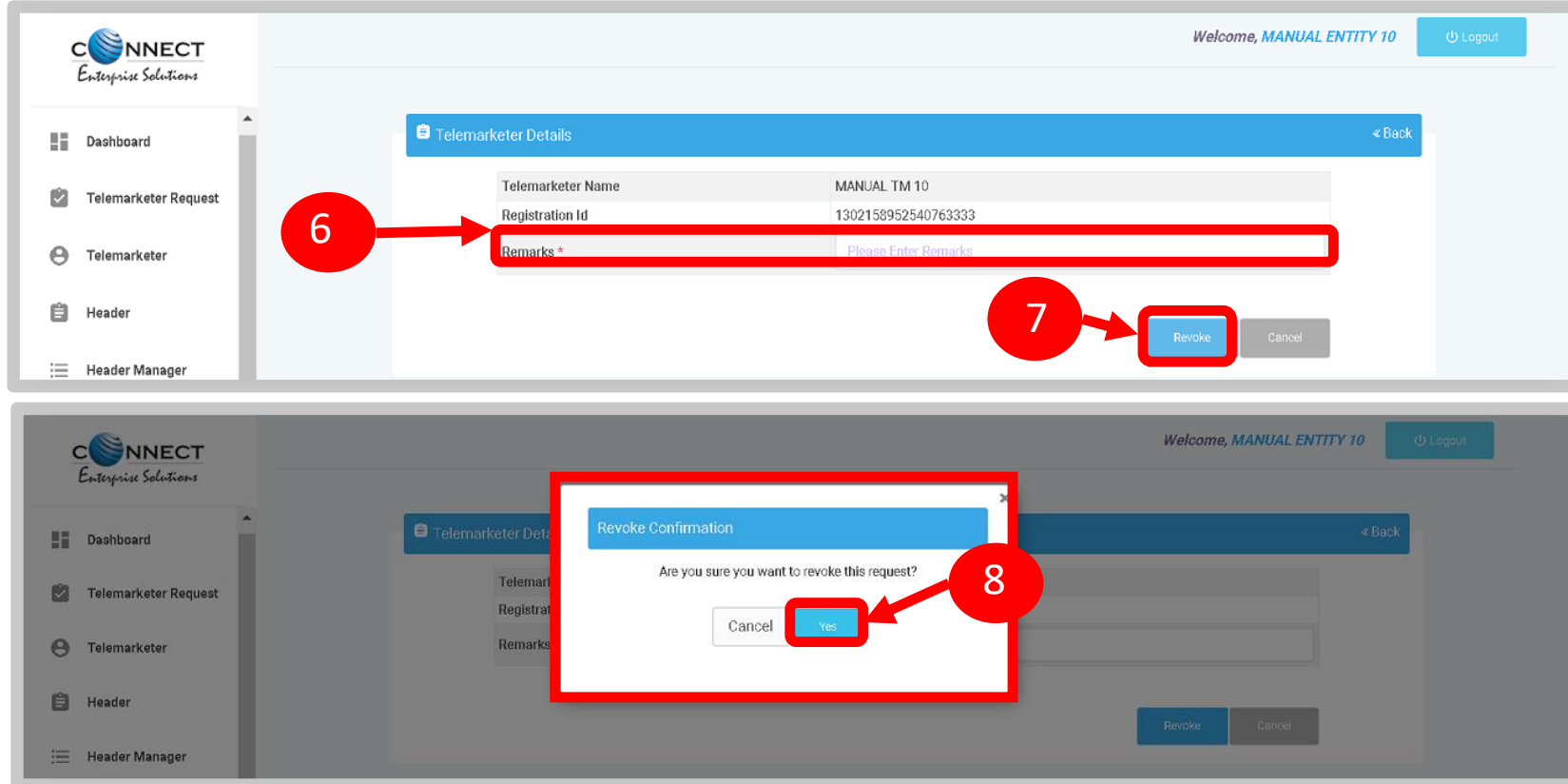


ENTITY –TELEMARKETER REVOCATION CONFIRMATION

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.

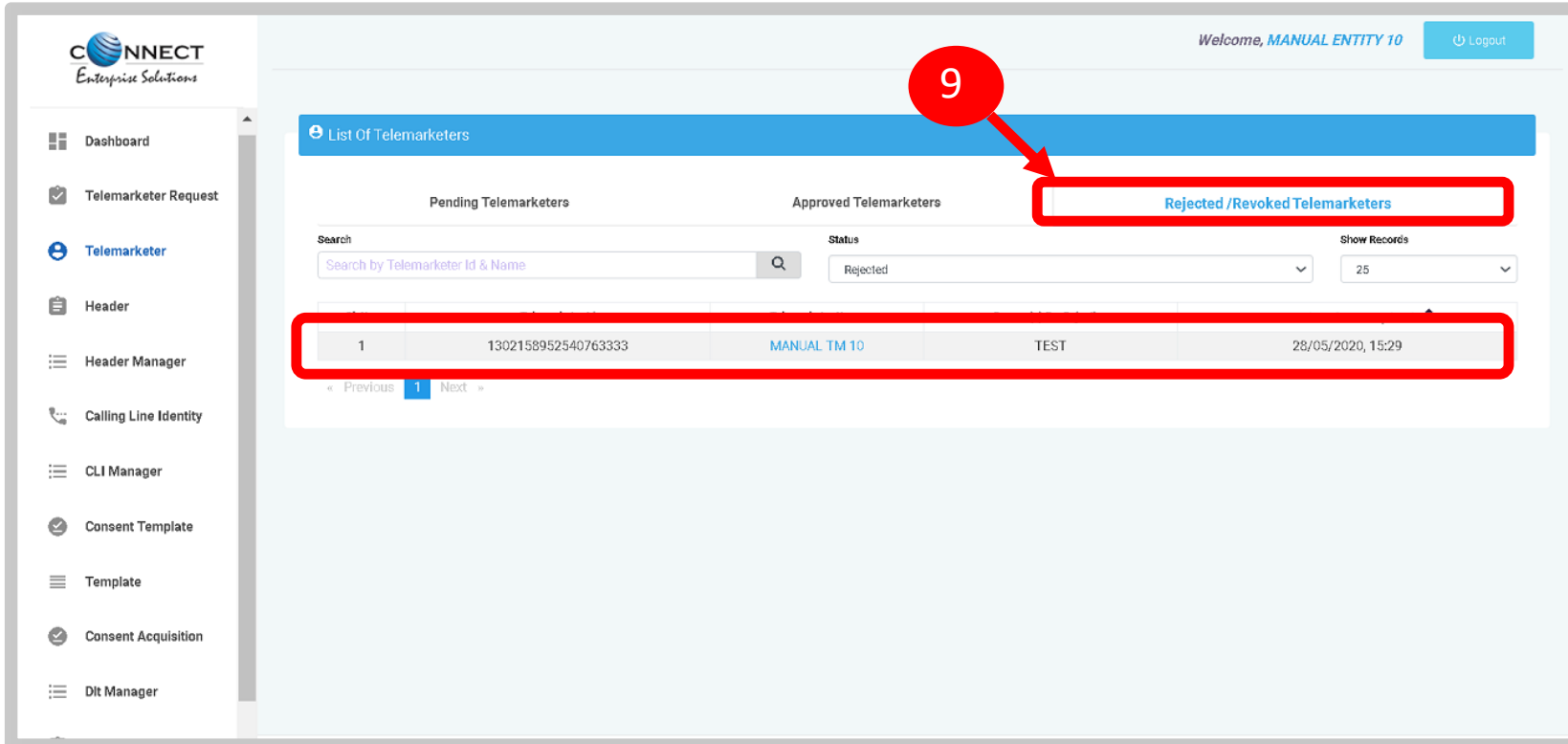


The screenshots illustrate the following steps:

- Step 6:** The 'Telemarketer Details' form is displayed. The 'Remarks' field is highlighted with a red circle and arrow, indicating where to enter the reason for revocation.
- Step 7:** The 'Revoke' button is highlighted with a red circle and arrow, indicating the next action to take.
- Step 8:** A 'Revoke Confirmation' pop-up dialog is shown, asking 'Are you sure you want to revoke this request?'. The 'Yes' button is highlighted with a red circle and arrow, indicating the confirmation step.

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.



The screenshot displays the 'List Of Telemarketers' 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 Dlt Manager. The main content area has three tabs: 'Pending Telemarketers', 'Approved Telemarketers', and 'Rejected /Revoked Telemarketers'. The 'Rejected /Revoked Telemarketers' tab is selected and highlighted with a red box. Below the tabs is a search bar and a status filter set to 'Rejected'. A table below shows one record, which is also highlighted with a red box. The table has columns for ID, Telemarketer ID, Name, Status, and Date/Time.

ID	Telemarketer ID	Name	Status	Date/Time
1	1302158952540763333	MANUAL TM 10	TEST	28/05/2020, 15:29

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.

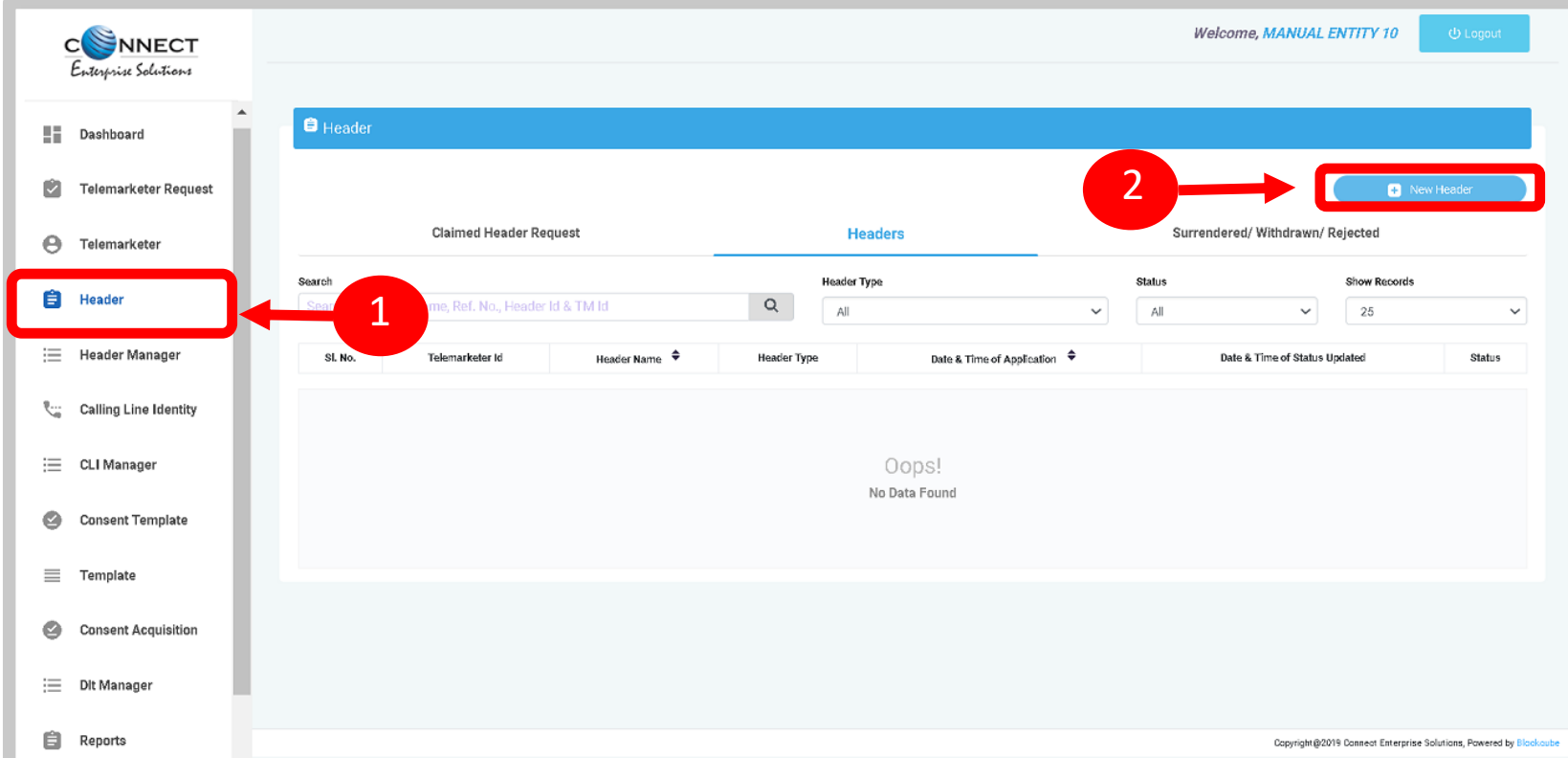
Service Implicit - Service messages that are ought to be sent basis on the business relation with the customer. Ex : Service Alert Messages

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 shows the 'CONNECT Enterprise Solutions' interface. On the left, a navigation menu lists various options, with 'Header' selected and highlighted by a red box and a red arrow labeled '1'. The main content area features a blue header bar with a 'Header' tab. Below this, there are three tabs: 'Claimed Header Request', 'Headers' (which is active), and 'Surrendered/ Withdrawn/ Rejected'. A 'New Header' button is highlighted with a red box and a red arrow labeled '2'. Below the tabs, there is a search bar with the placeholder text 'Search by 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'). Below these elements is a table with the following columns: 'Sl. No.', 'Telemarketer Id', 'Header Name', 'Header Type', 'Date & Time of Application', 'Date & Time of Status Updated', and 'Status'. The table currently displays 'Oops! No Data Found'.

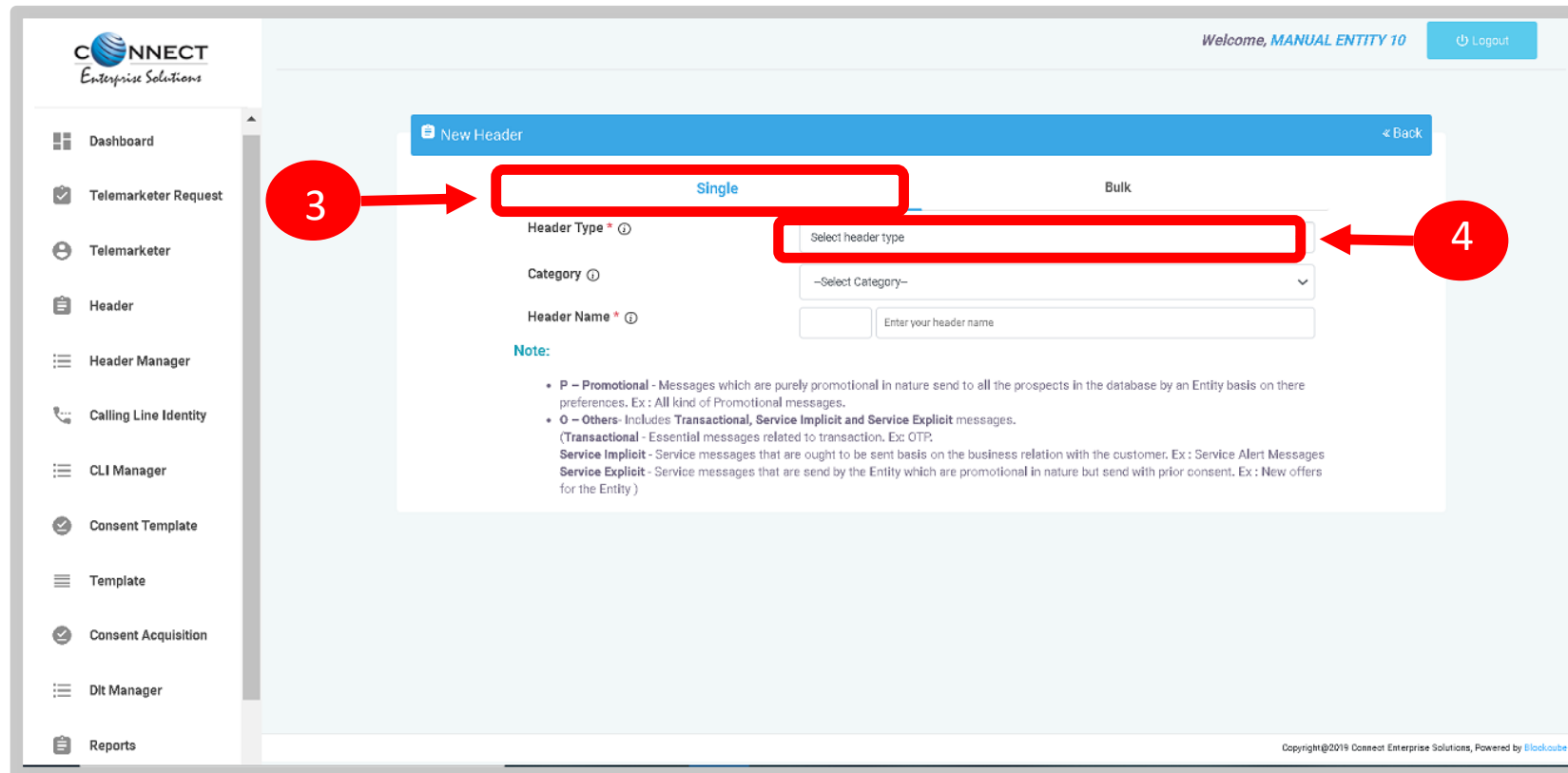
HEADER CREATION – SELECTION OF HEADER TYPE

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)*



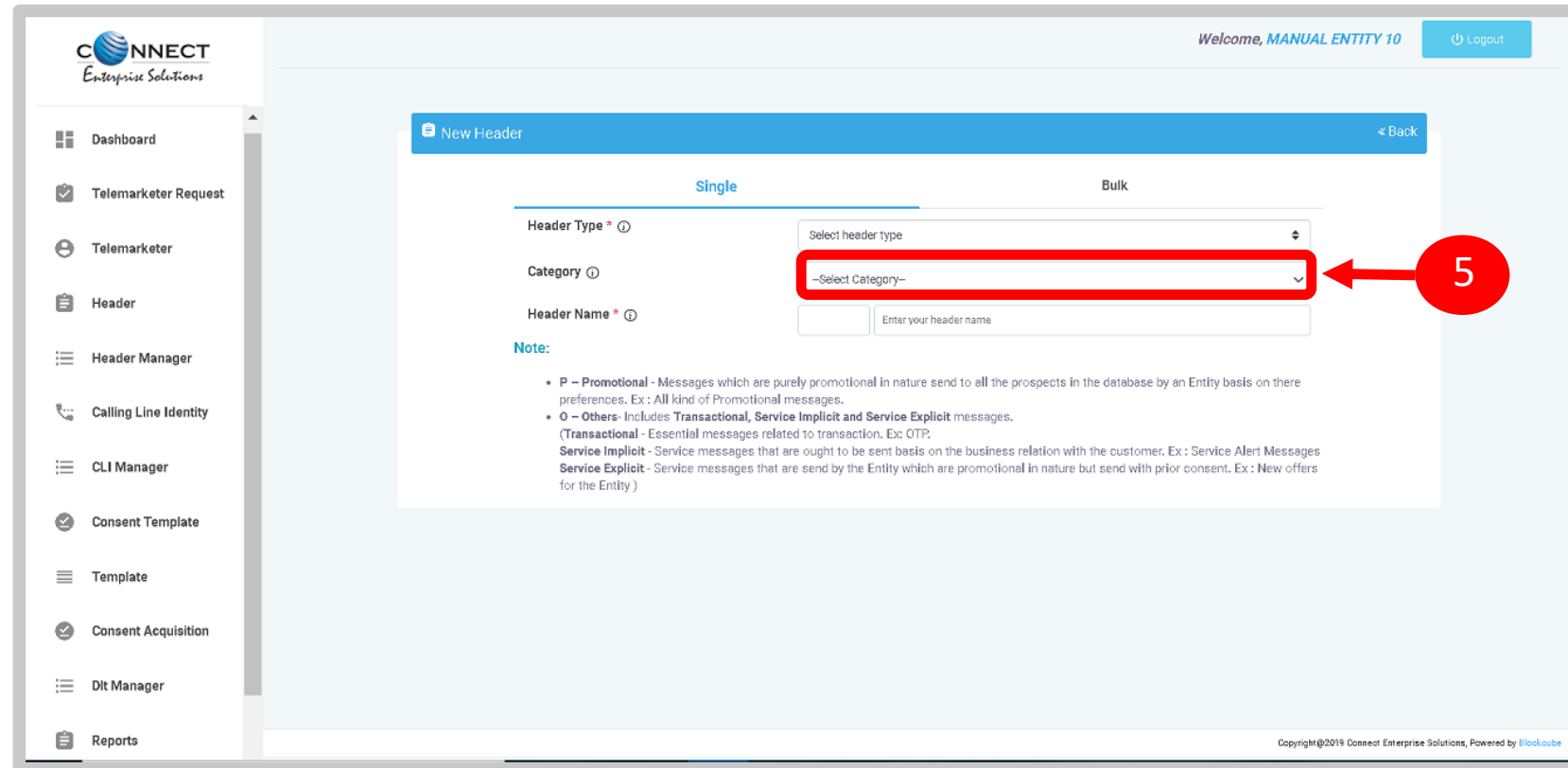
NOTE : In case of Government Entities, there will be Header Exemption option (If selected you will have to upload verification document)

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.



CONNECT Enterprise Solutions

Welcome, MANUAL ENTITY 10 [Logout](#)

New Header [← Back](#)

Single Bulk

Header Type *

Category

Header Name *

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)

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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

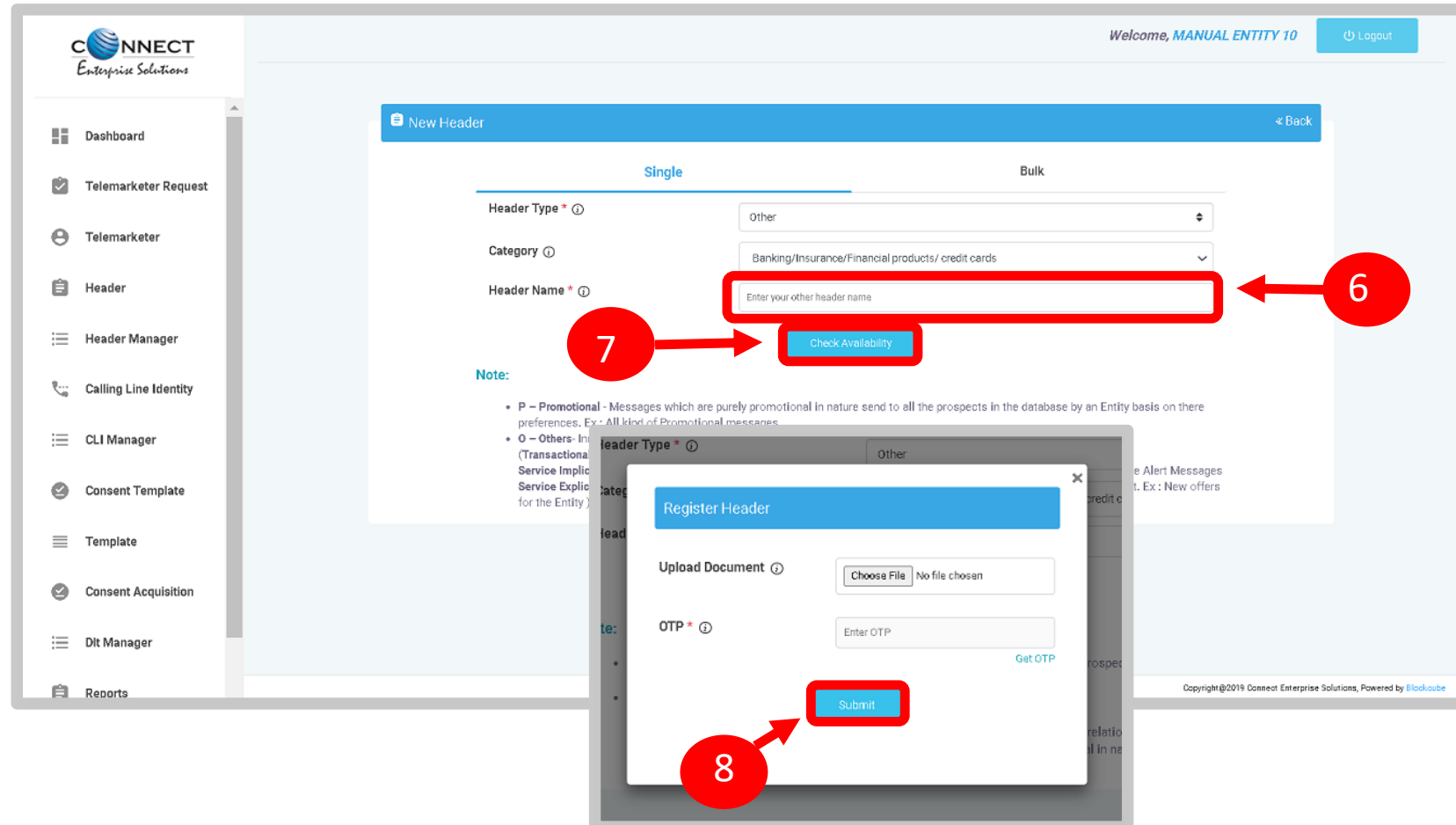
6 Type in the desired **Header Name** according to your Header Type/Brand Name or business requirement.

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.



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 'Header' management page. The left sidebar contains navigation options: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager, and Calling Line Identity. The main content area has a 'Header' title bar and a 'New Header' button. Below this, there are three tabs: 'Claimed Header Request', 'Headers' (selected), and 'Surrendered/ Withdrawn/ Rejected'. A search bar is present with the placeholder 'Search by Header Name, Ref. No., Header Id & TM Id'. There are also dropdown menus for 'Header Type' (set to 'All'), 'Status' (set to 'All'), and 'Show Records' (set to '25'). A table displays the following data:

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	-	Pending

A red circle with the number '9' and an arrow points to the 'Pending' status in the table.

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

The screenshot shows the same 'Header' management page as above, but the status of the header in the table has changed to 'Active'. The table data is as follows:

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, 12:39	Active

A red circle with the number '10' and an arrow points to the 'Active' status in the table.

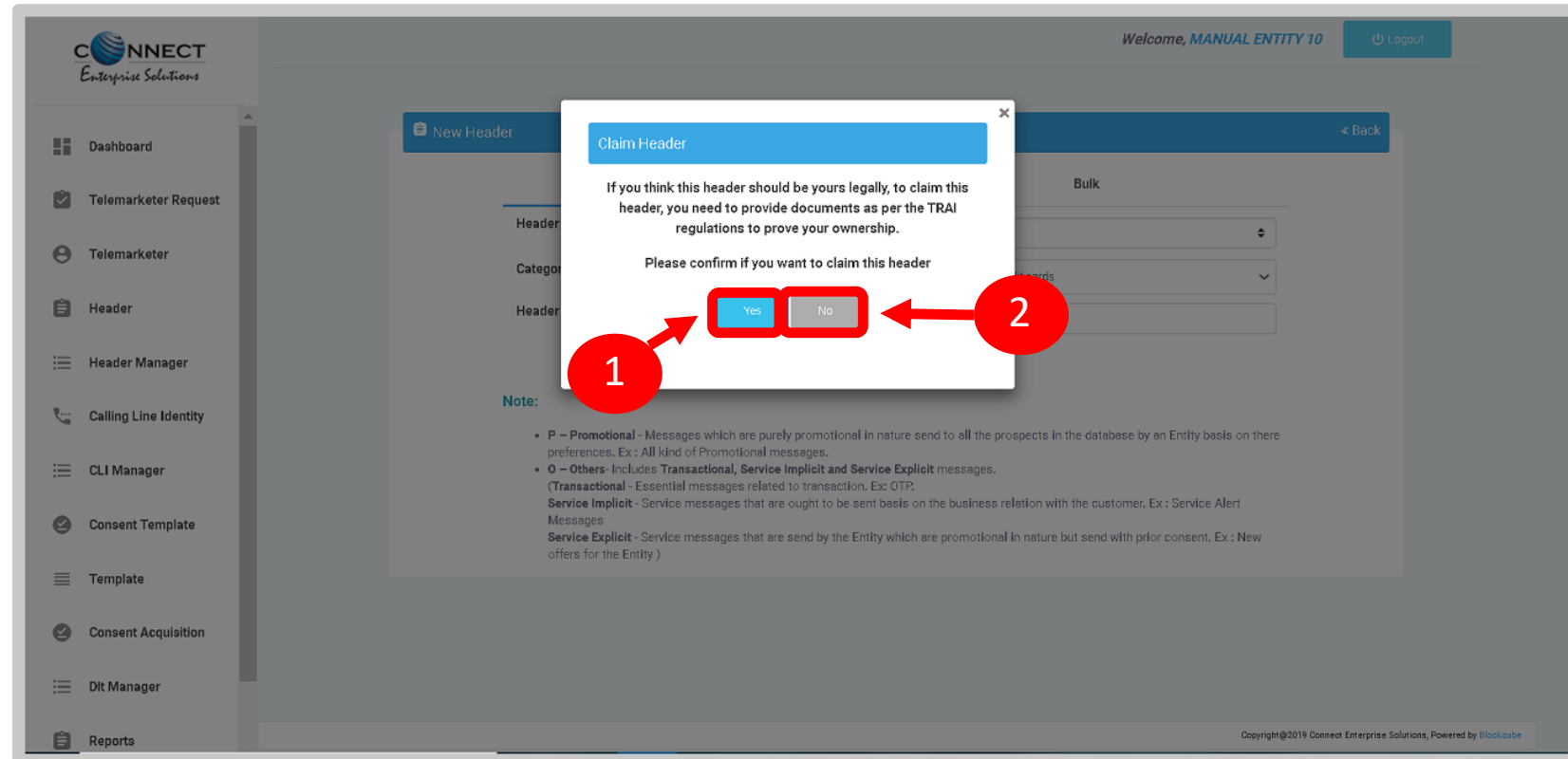
CLAIM HEADER

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



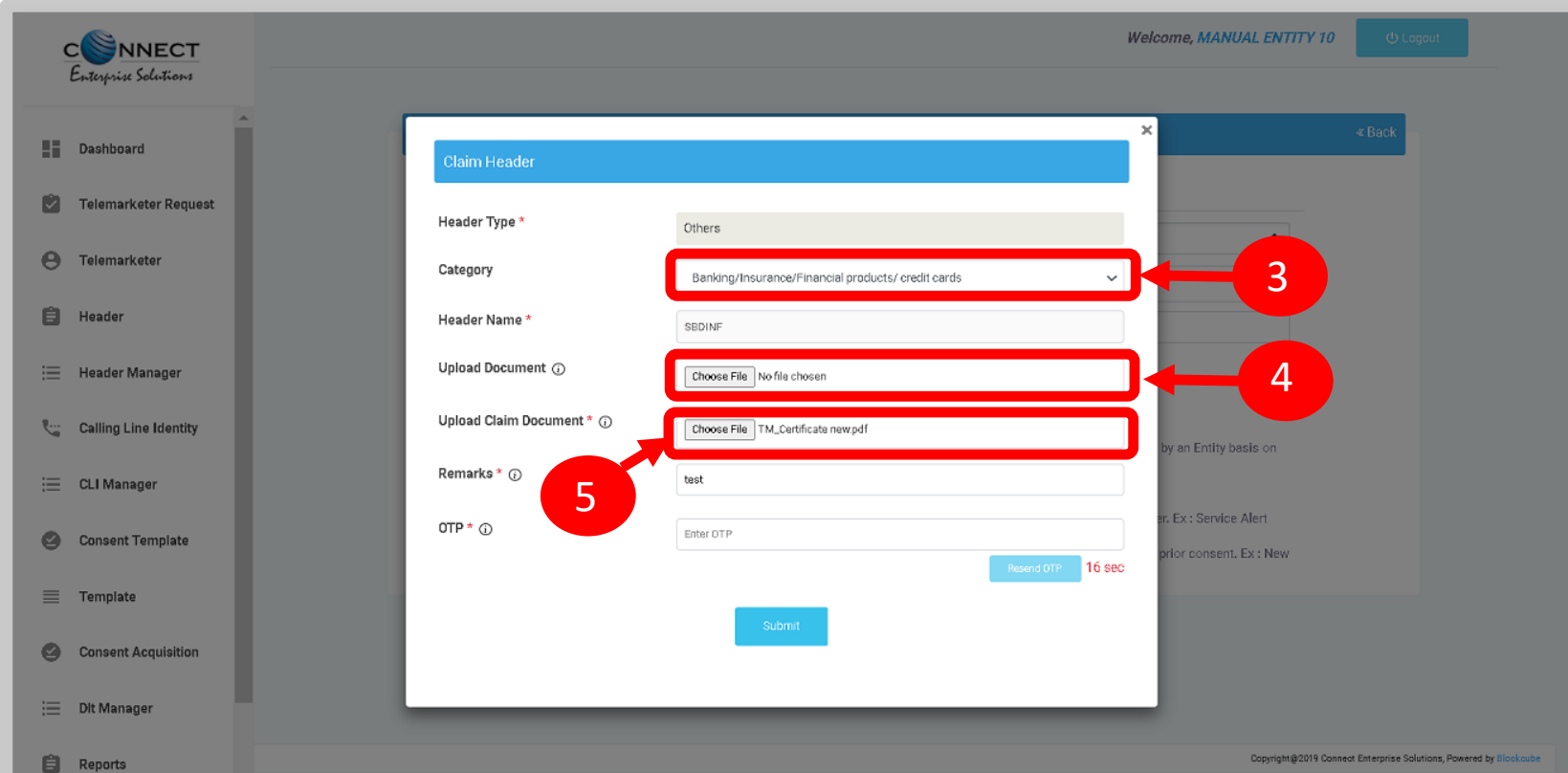
CLAIM HEADER – CATEGORY SELECTION / DOCUMENT UPLOAD

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.



The screenshot shows the 'Claim Header' pop-up form with the following fields and annotations:

- Header Type ***: Dropdown menu with 'Others' selected.
- Category**: Dropdown menu with 'Banking/Insurance/Financial products/ credit cards' selected. Annotated with a red circle '3' and an arrow.
- Header Name ***: Text input field with 'SBDINF' entered.
- Upload Document**: File upload field with 'Choose File' button and 'No file chosen' text. Annotated with a red circle '4' and an arrow.
- Upload Claim Document ***: File upload field with 'Choose File' button and 'TM_Certificata new.pdf' text. Annotated with a red circle '5' and an arrow.
- Remarks ***: Text input field with 'test' entered.
- OTP ***: Text input field with 'Enter OTP' placeholder.
- Buttons**: 'Resend OTP' (16 sec) and 'Submit'.

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**.

Welcome, **MANUAL ENTITY 10** [Logout](#)

Header New Header

Claimed Header Request 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	SBDINF	Others	30/05/2020 , 12:53	-	Pending

« Previous 1 Next »

Welcome, **MANUAL ENTITY 10** [Logout](#)

Header New Header

Claimed Header Request Headers Surrendered/ Withdrawn/ Rejected

Search Search by Header Name, Ref. No., Header Id & TM Id

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	MNLTY	Others	30/05/2020 , 12:36	30/05/2020 , 12:36	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 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.

The screenshot shows the 'Header' management interface. The main table lists headers with the following data:

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	Active
3	NA	MNLTY	Others	30/05/2020, 12:36	30/05/2020	Active

The 'Header details' modal window displays the following information:

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

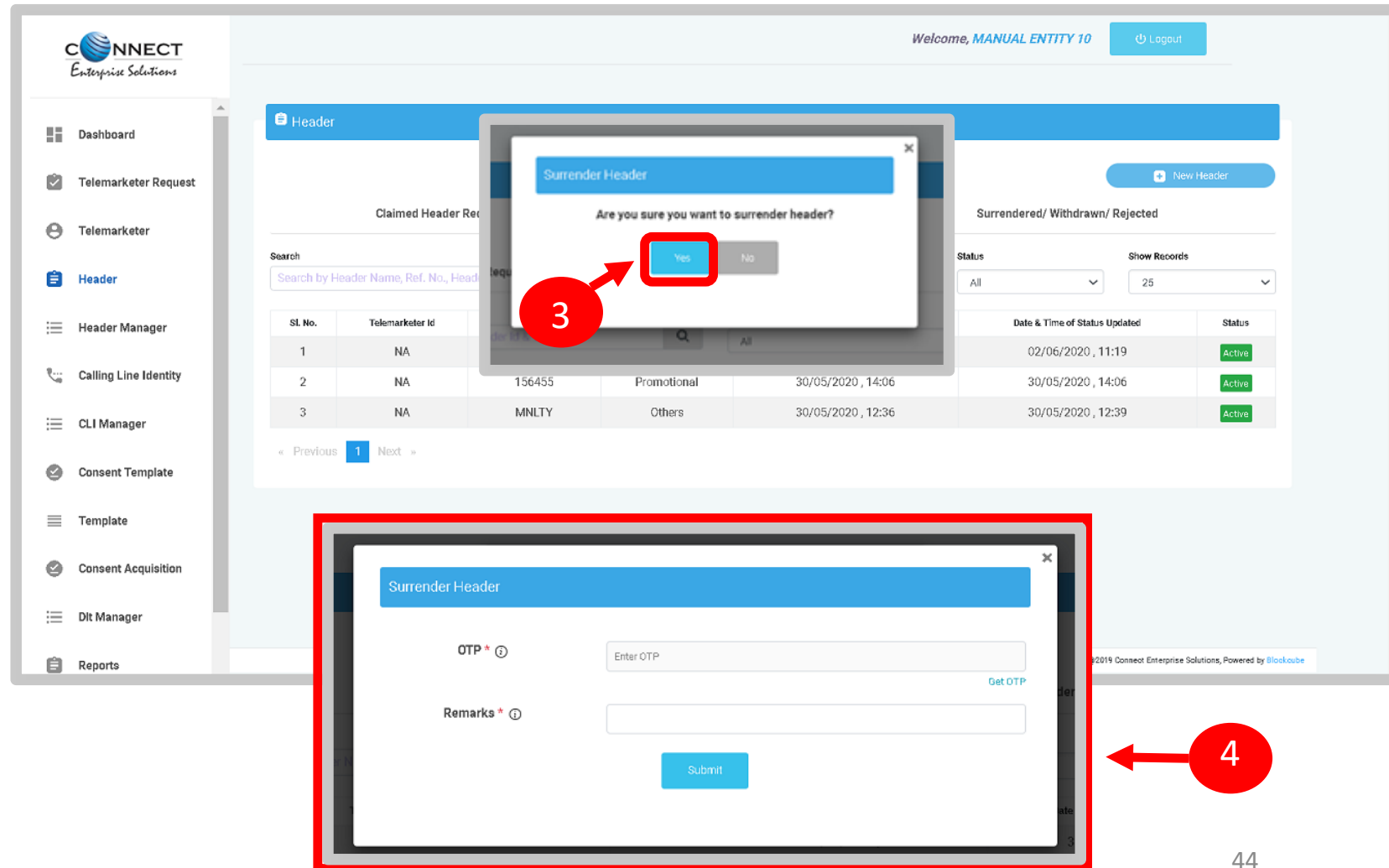
HEADER SURRENDER – OTP / CONFIRMATION

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.



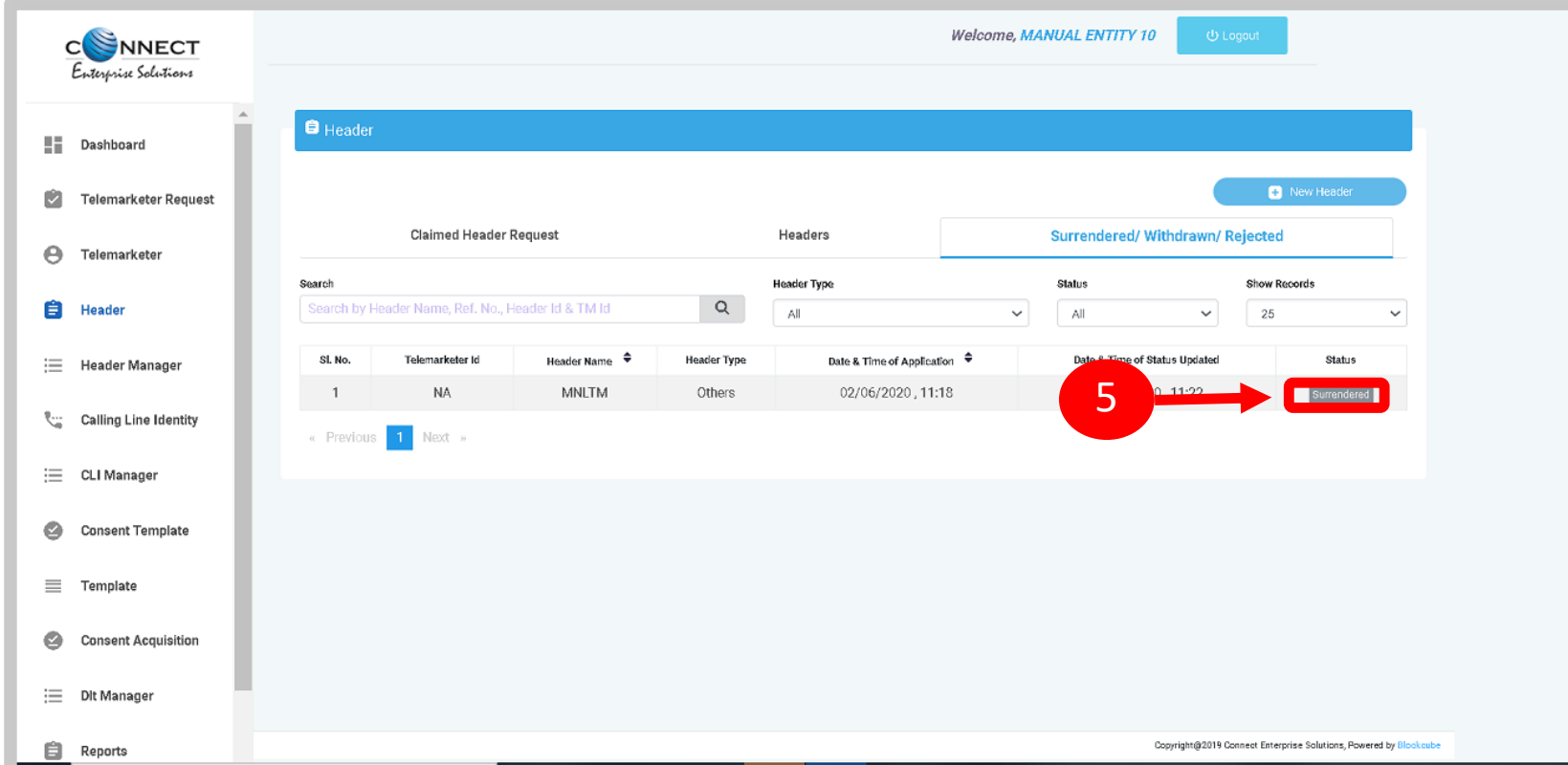
The screenshot displays the 'CONNECT Enterprise Solutions' dashboard with a sidebar menu on the left. The main content area is titled 'Header' and contains a table of 'Claimed Header Records'. A pop-up window titled 'Surrender Header' is overlaid on the table, asking 'Are you sure you want to surrender header?' with 'Yes' and 'No' buttons. A red circle with the number '3' points to the 'Yes' button. Below this, another pop-up window titled 'Surrender Header' is shown, containing fields for 'OTP' and 'Remarks', and a 'Submit' button. A red circle with the number '4' points to this second pop-up window.

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

HEADER SURRENDER - STATUS

5

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



CONNECT Enterprise Solutions

Welcome, MANUAL ENTITY 10 [Logout](#)

Header

[New Header](#)

Claimed Header Request Headers **Surrendered/ Withdrawn/ Rejected**

Search:

Header Type: Status: Show Records:

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, 11:22	Surrendered

« Previous 1 Next »

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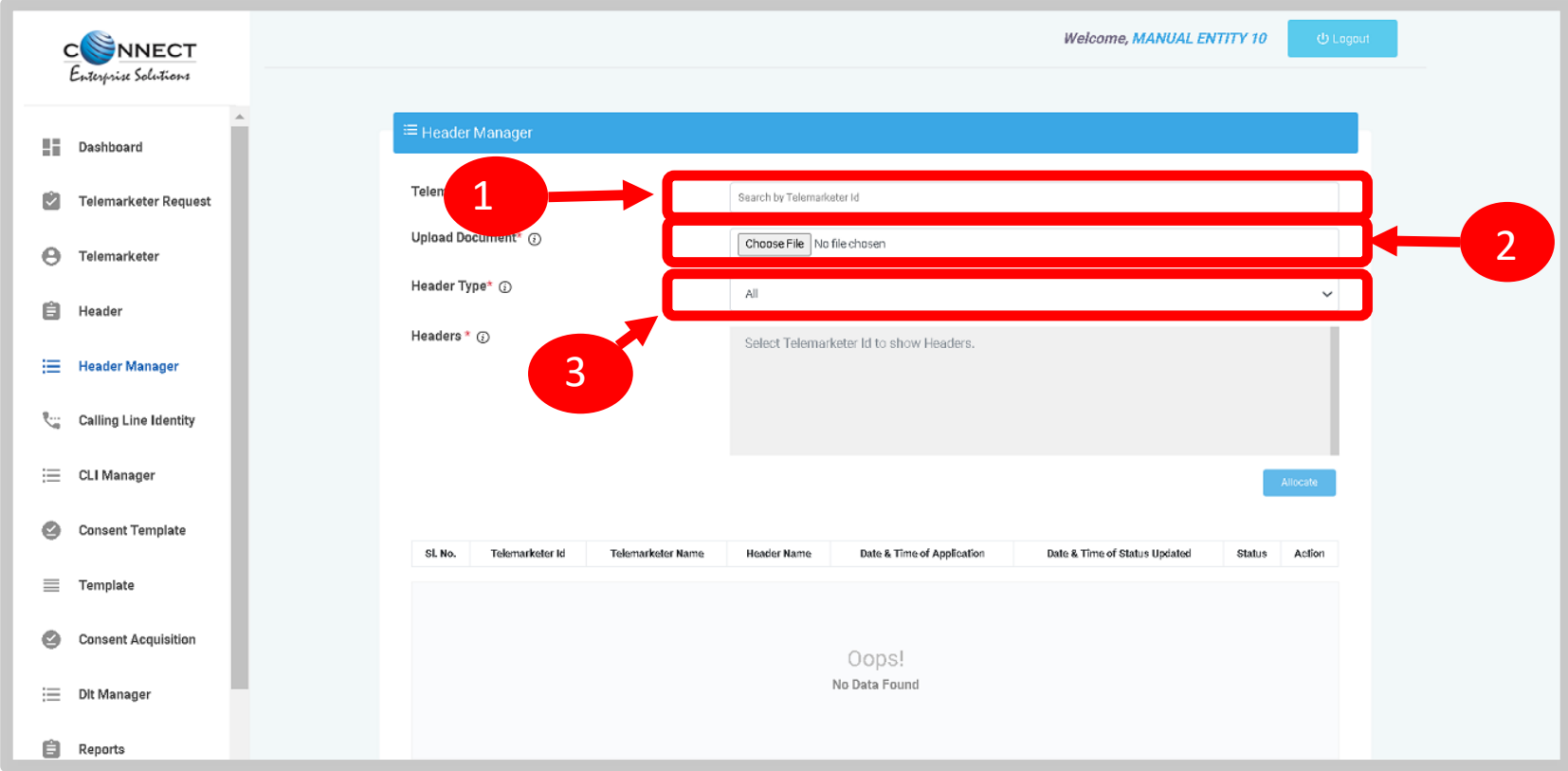
HEADER MANAGER

(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



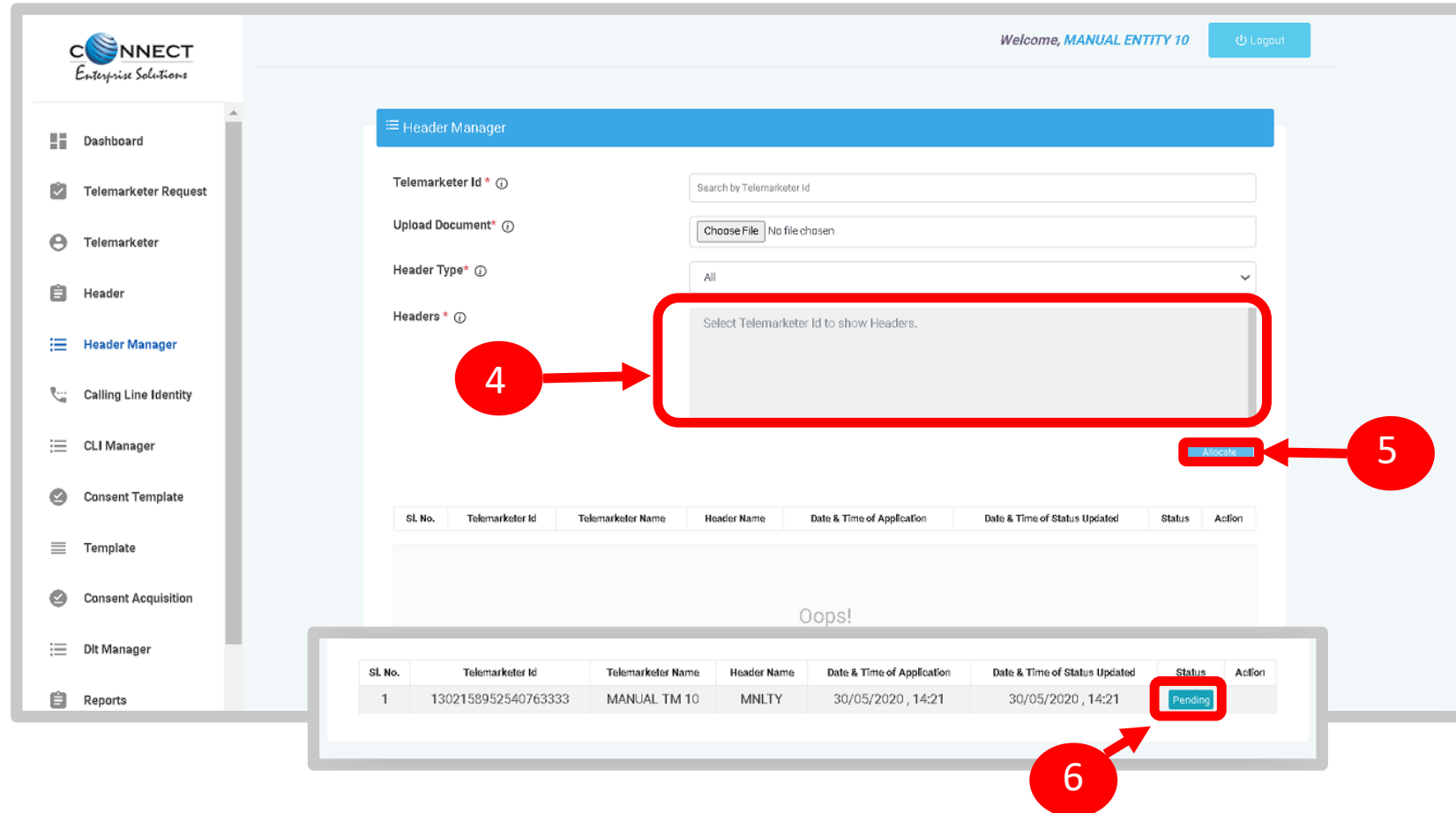
The screenshot shows the 'Header Manager' interface. On the left is a navigation menu with options: Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager (highlighted), Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a header 'Header Manager' and a 'Logout' button. Below the header, there are three input fields: 'Search by Telemarketer Id' (with callout 1), 'Upload Document*' (with callout 2), and 'Header Type*' (with callout 3). Below these is a table with columns: Sl. No., Telemarketer Id, Telemarketer Name, Header Name, Date & Time of Application, Date & Time of Status Updated, Status, and Action. The table is currently empty, showing a message: 'Oops! No Data Found'. An 'Allocate' button is located at the bottom right of the form area.

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' interface. On the left is a navigation menu with items like Dashboard, Telemarketer Request, Telemarketer, Header, Header Manager (selected), Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dlt Manager, and Reports. The main content area has a header bar with 'CONNECT Enterprise Solutions' and 'Welcome, MANUAL ENTITY 10' with a Logout button. Below the header bar are form fields: 'Telemarketer Id *' with a search box, 'Upload Document *' with a 'Choose File' button, 'Header Type *' with a dropdown menu set to 'All', and 'Headers *' with a text box containing 'Select Telemarketer Id to show Headers.' and an 'Allocate' button. Below the form is a table with columns: SL No., Telemarketer Id, Telemarketer Name, Header Name, Date & Time of Application, Date & Time of Status Updated, Status, and Action. The table contains one row with status 'Pending'. A red box highlights the 'Pending' status, and a red circle with the number '6' points to it. Another red circle with the number '4' points to the 'Headers' box, and a red circle with the number '5' points to the 'Allocate' button.

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 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 shows the 'Header Manager' interface. A 'Header Revoke Confirmation' dialog box is displayed, asking for confirmation to revoke a header. The 'Yes' button in the dialog is highlighted with a red circle and arrow labeled '7'. In the background, a table lists headers, with the 'Revoke' button for the first row highlighted with a red circle and arrow labeled '8'. Below the dialog, the table shows the status of the header has changed from 'Active' to 'Revoked', with a red circle and arrow labeled '9' pointing to the 'Revoked' status.

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	Revoke

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	Revoked	

CONSENT TEMPLATE

CONSENT TEMPLATE – CREATION OF CONSENT TEMPLATE

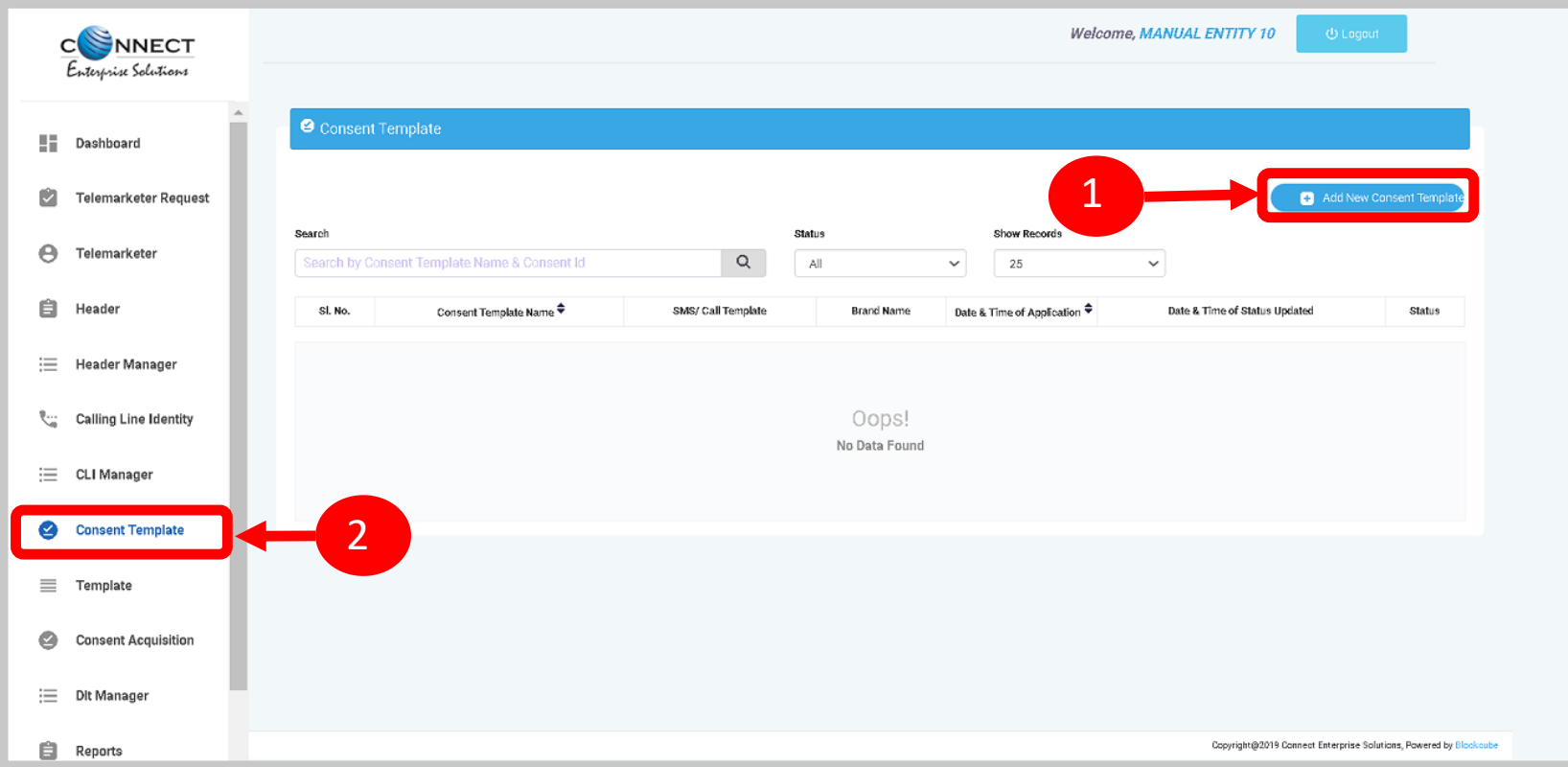
Consent Template is created to acquire prior consent from the customer to send commercial communication which are related to Service or Promotion of Product/Services of an Business Entity.

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.



CONNECT Enterprise Solutions

Welcome, MANUAL ENTITY 10 [Logout](#)

Consent Template

Search:

Status: Show Records:

Sl. No.	Consent Template Name	SMS/ Call Template	Brand Name	Date & Time of Application	Date & Time of Status Updated	Status
Oops! No Data Found						

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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

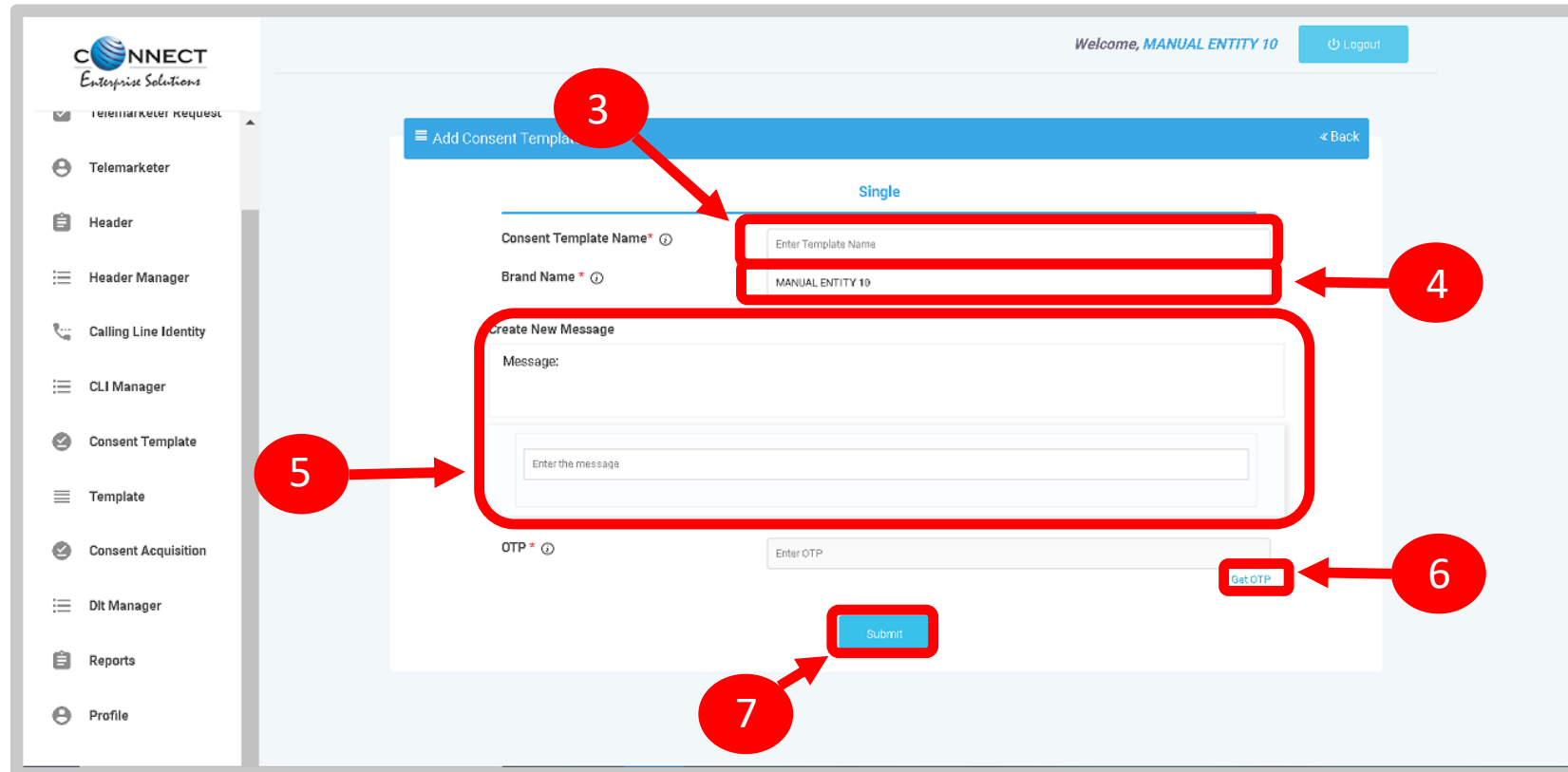
To create content for the consent template type the content required in the **Message box**.

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.



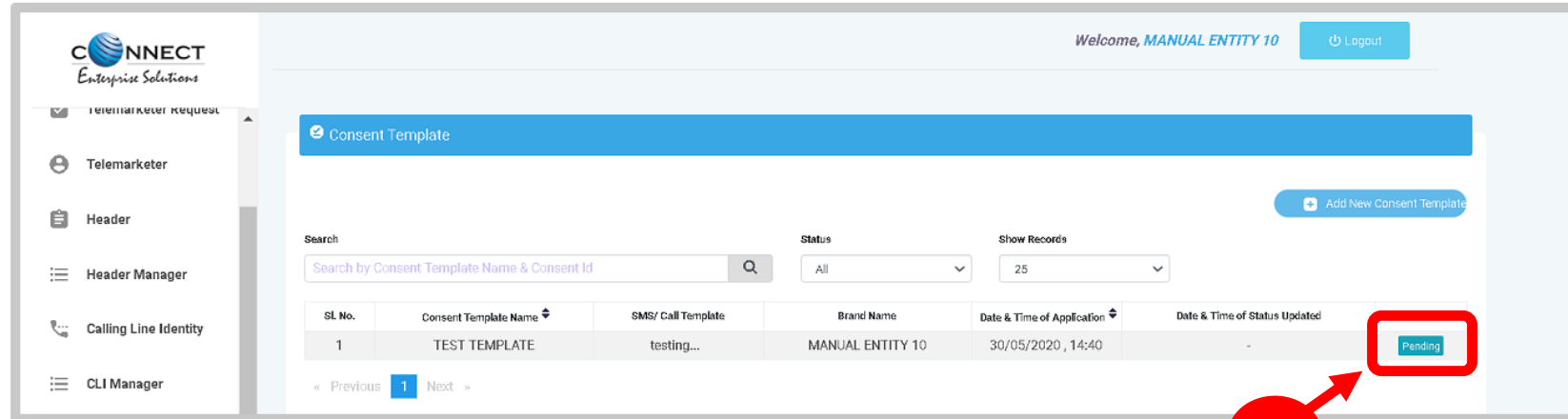
The screenshot displays the 'Add Consent Template' form in the CONNECT Enterprise Solutions application. The form is titled 'Single' and includes the following elements:

- Consent Template Name***: A text input field with the placeholder 'Enter Template Name'. A red circle labeled '3' points to this field.
- Brand Name ***: A text input field with the value 'MANUAL ENTITY 10'. A red circle labeled '4' points to this field.
- Create New Message**: A section containing a 'Message:' label and a text input field with the placeholder 'Enter the message'. A red circle labeled '5' points to this input field.
- OTP ***: A text input field with the placeholder 'Enter OTP'. A red circle labeled '6' points to the 'Get OTP' link located to the right of this field.
- Submit**: A blue button at the bottom of the form. A red circle labeled '7' points to this button.

CONSENT TEMPLATE – REQUEST STATUS

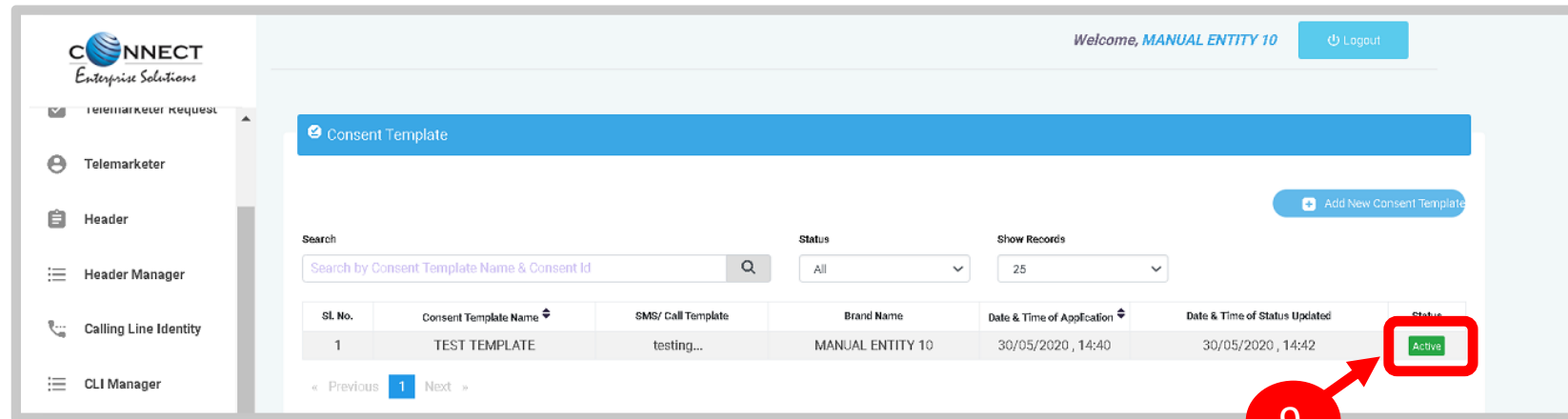
8

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



9

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



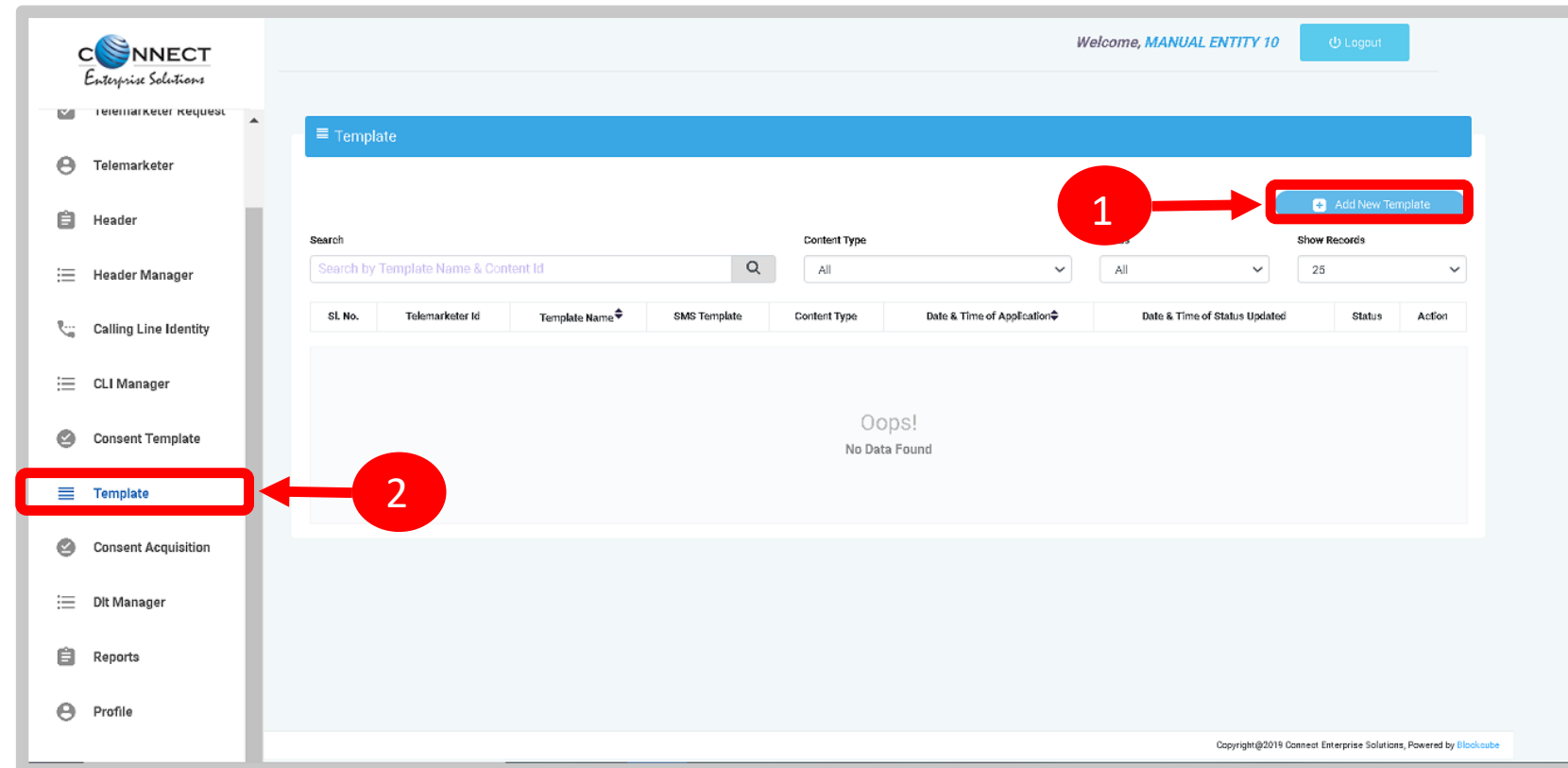
TEMPLATE (CONTENT)

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.



The screenshot displays the 'Template' management interface. On the left sidebar, the 'Template' option is highlighted with a red box and an arrow labeled '2'. The main content area shows a search bar, filters for 'Content Type' and 'Show Records', and a table with columns: SL No., Telemarketer Id, Template Name, SMS Template, Content Type, Date & Time of Application, Date & Time of Status Updated, Status, and Action. The 'Add New Template' button is highlighted with a red box and an arrow labeled '1'. The table currently displays 'Oops! No Data Found'.

TEMPLATE – SELECTION OF NAME/COMMUNICATION AND CONTENT TYPE

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

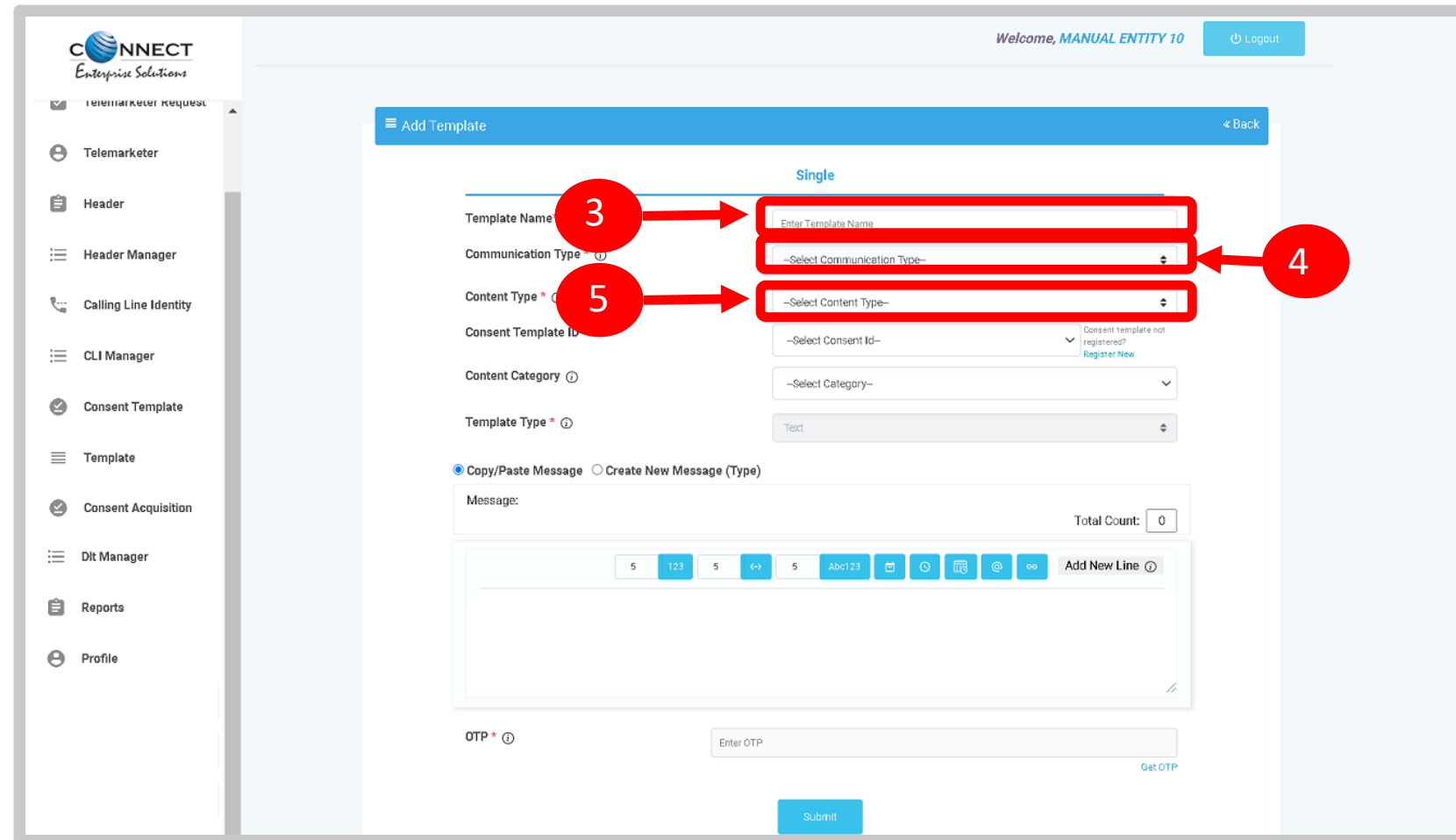
4 In the **Communication Type** column select the type of communication from the following:

- 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 CONNECT Enterprise Solutions interface. The form is titled 'Single' and includes the following fields:

- Template Name:** A text input field with a red circle '3' and an arrow pointing to it.
- Communication Type:** A dropdown menu with a red circle '4' and an arrow pointing to it.
- Content Type:** A dropdown menu with a red circle '5' and an arrow pointing to it.
- Consent Template ID:** A dropdown menu with a note 'Consent template not registered? Register New'.
- Content Category:** A dropdown menu.
- Template Type:** A dropdown menu with 'Text' selected.

Below the form, there are two radio buttons: 'Copy/Paste Message' (selected) and 'Create New Message (Type)'. The 'Message:' field contains a rich text editor with a toolbar and a 'Total Count' of 0. At the bottom, there is an 'OTP *' field with a 'Get OTP' button and a 'Submit' button.

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.

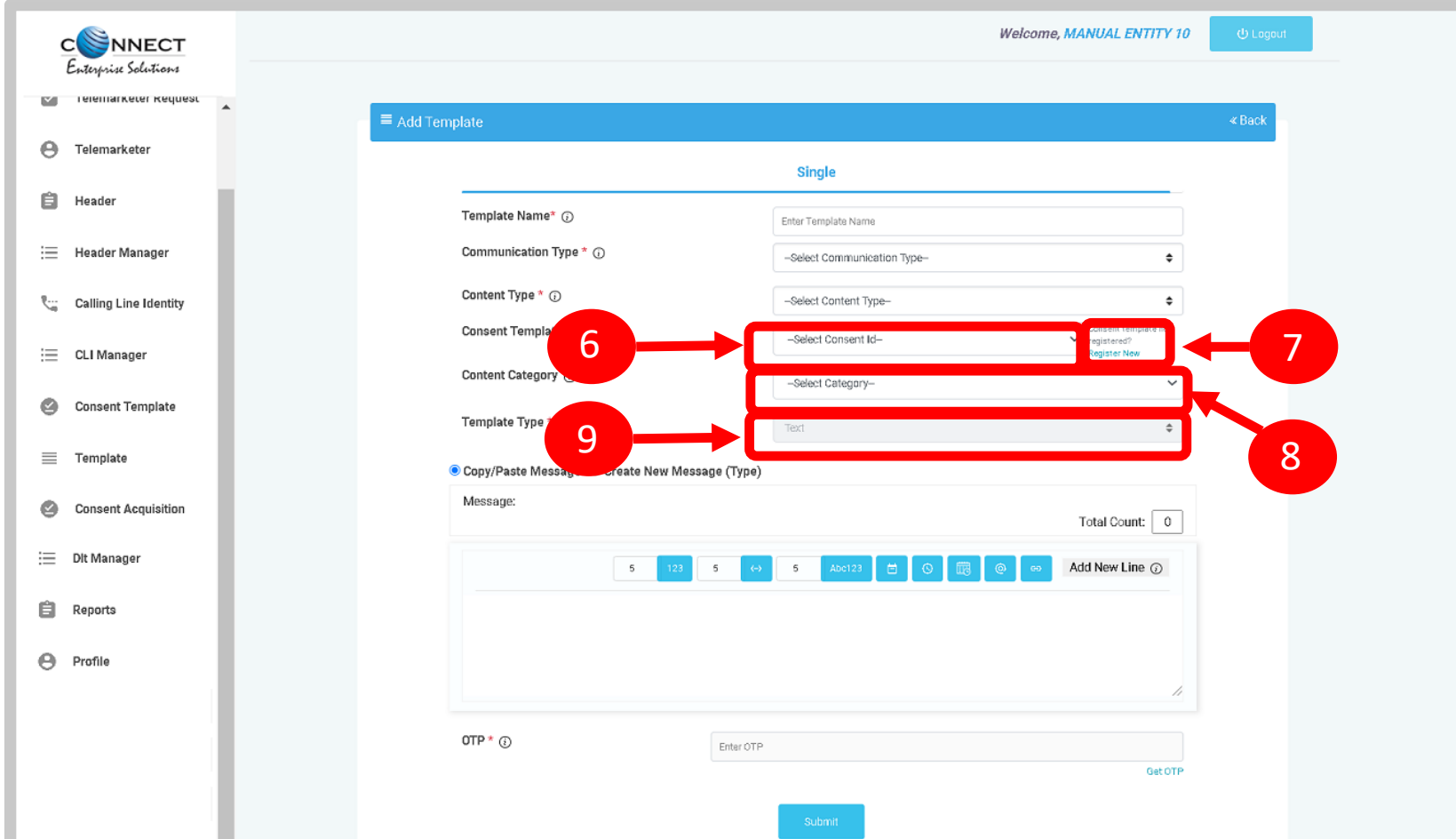
! *Consent Template ID is not mandatory for Transactional and Service Implicit commercial communications.*

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.

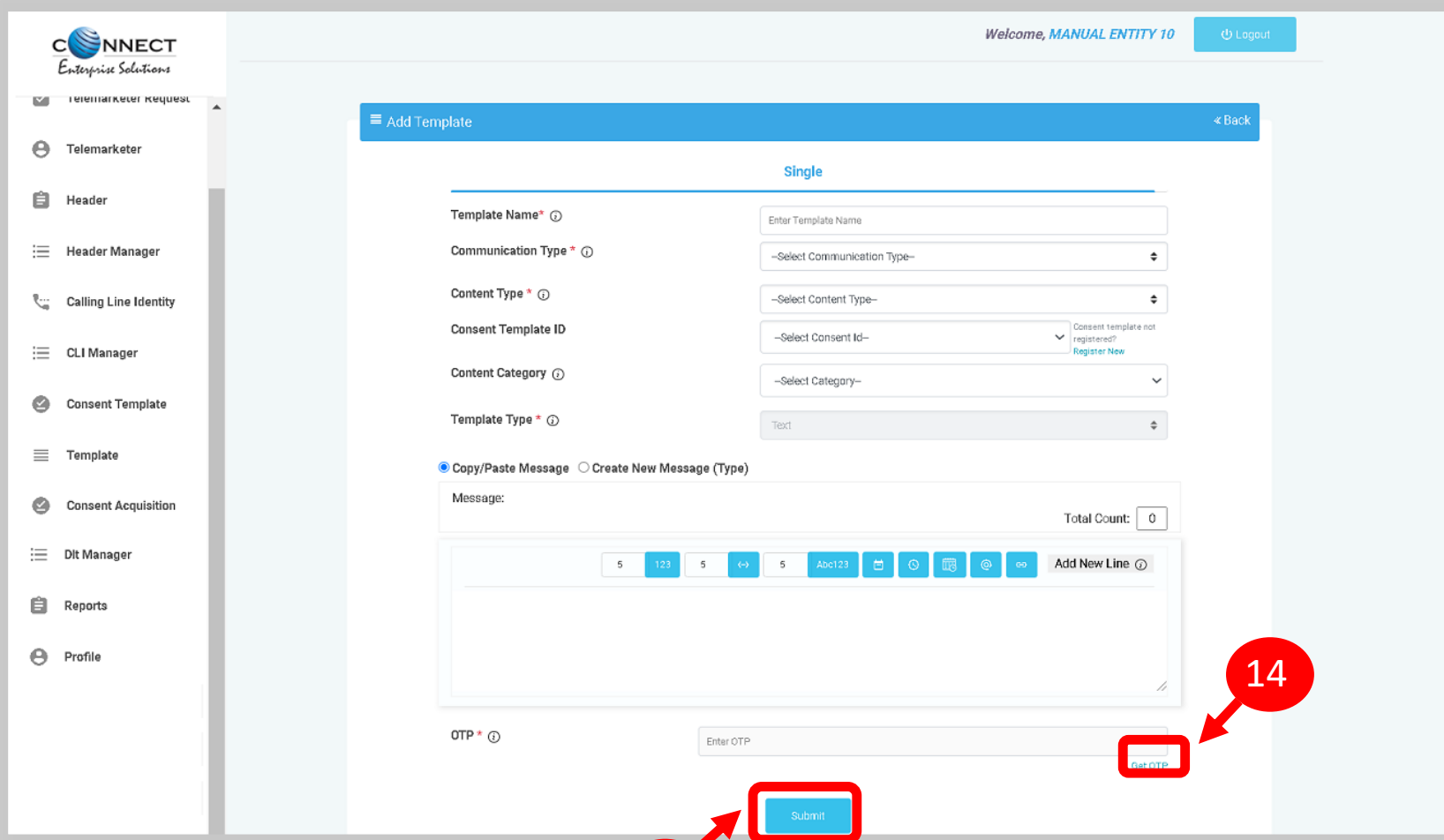
12 In the **Create New Message Box** type the required content and to add variables there are options available on the panel.

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.



The screenshot shows the 'Add Template' interface in the CONNECT Enterprise Solutions system. The form is titled 'Single' and contains the following fields:

- Template Name ***: Text input field with placeholder 'Enter Template Name'.
- Communication Type ***: Dropdown menu with placeholder '--Select Communication Type--'.
- Content Type ***: Dropdown menu with placeholder '--Select Content Type--'.
- Consent Template ID**: Dropdown menu with placeholder '--Select Consent Id--' and a link for 'Consent template not registered? Register New'.
- Content Category**: Dropdown menu with placeholder '--Select Category--'.
- Template Type ***: Dropdown menu with 'Text' selected.

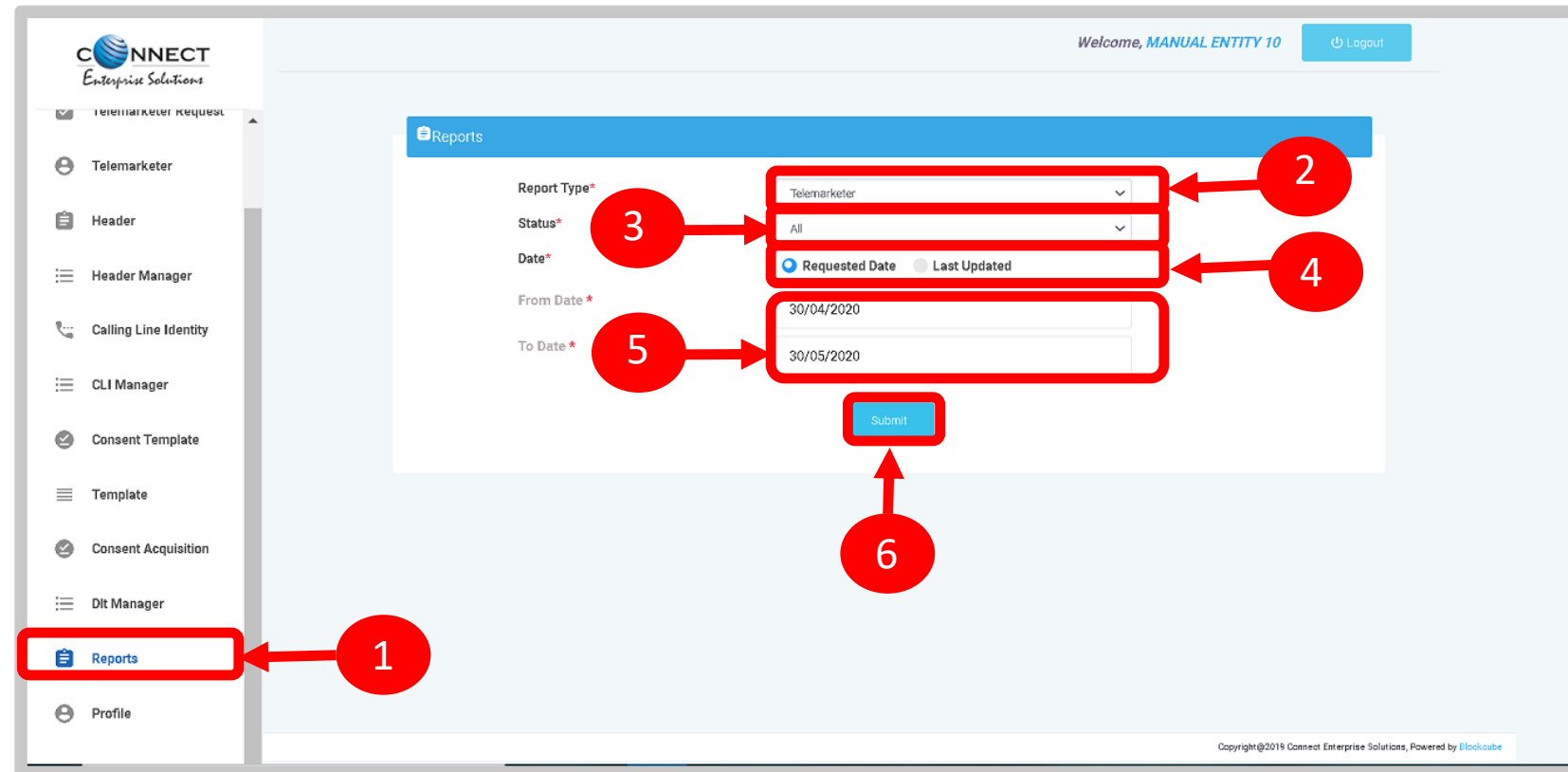
Below the form, there are two radio buttons: **Copy/Paste Message** (selected) and **Create New Message (Type)**. A **Message:** text area is provided with a **Total Count:** of 0. The message editor shows a sample message: "5 123 5 (-) 5 Abc123" with various icons for editing. An **Add New Line** link is also present.

At the bottom of the form, there is an **OTP *** field with the placeholder 'Enter OTP'. A red callout labeled '14' points to a **Get OTP** link located to the right of the OTP field. Another red callout labeled '15' points to a **Submit** button located below the OTP field.

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

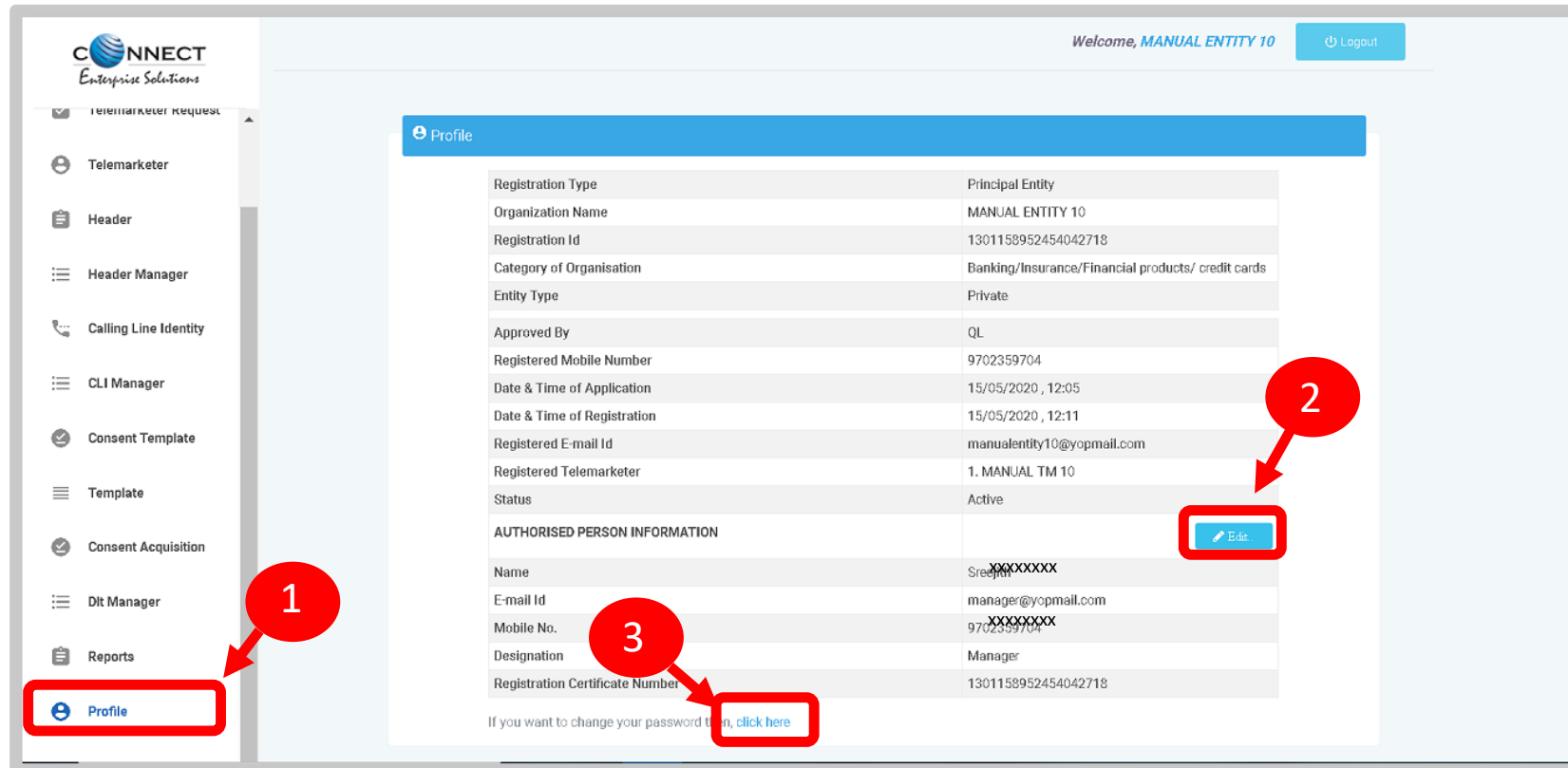
PROFILE PAGE

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 displays the 'Profile' page for 'MANUAL ENTITY 10'. The sidebar on the left contains the following menu items: Telemarketer Request, Telemarketer, Header, Header Manager, Calling Line Identity, CLI Manager, Consent Template, Template, Consent Acquisition, Dit Manager, Reports, and Profile (highlighted with a red box and arrow labeled '1').

The main content area shows the following details:

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

Below this is the 'AUTHORISED PERSON INFORMATION' section:

Name	Sredhri XXXXXXXX
E-mail Id	manager@yopmail.com
Mobile No.	9702359704 XXXXXXXX
Designation	Manager
Registration Certificate Number	1301158952454042718

An 'Edit' button (highlighted with a red box and arrow labeled '2') is located to the right of the 'AUTHORISED PERSON INFORMATION' table. At the bottom of the page, there is a link that says 'If you want to change your password then, [click here](#)' (highlighted with a red box and arrow labeled '3'). A 'Logout' button is visible in the top right corner.

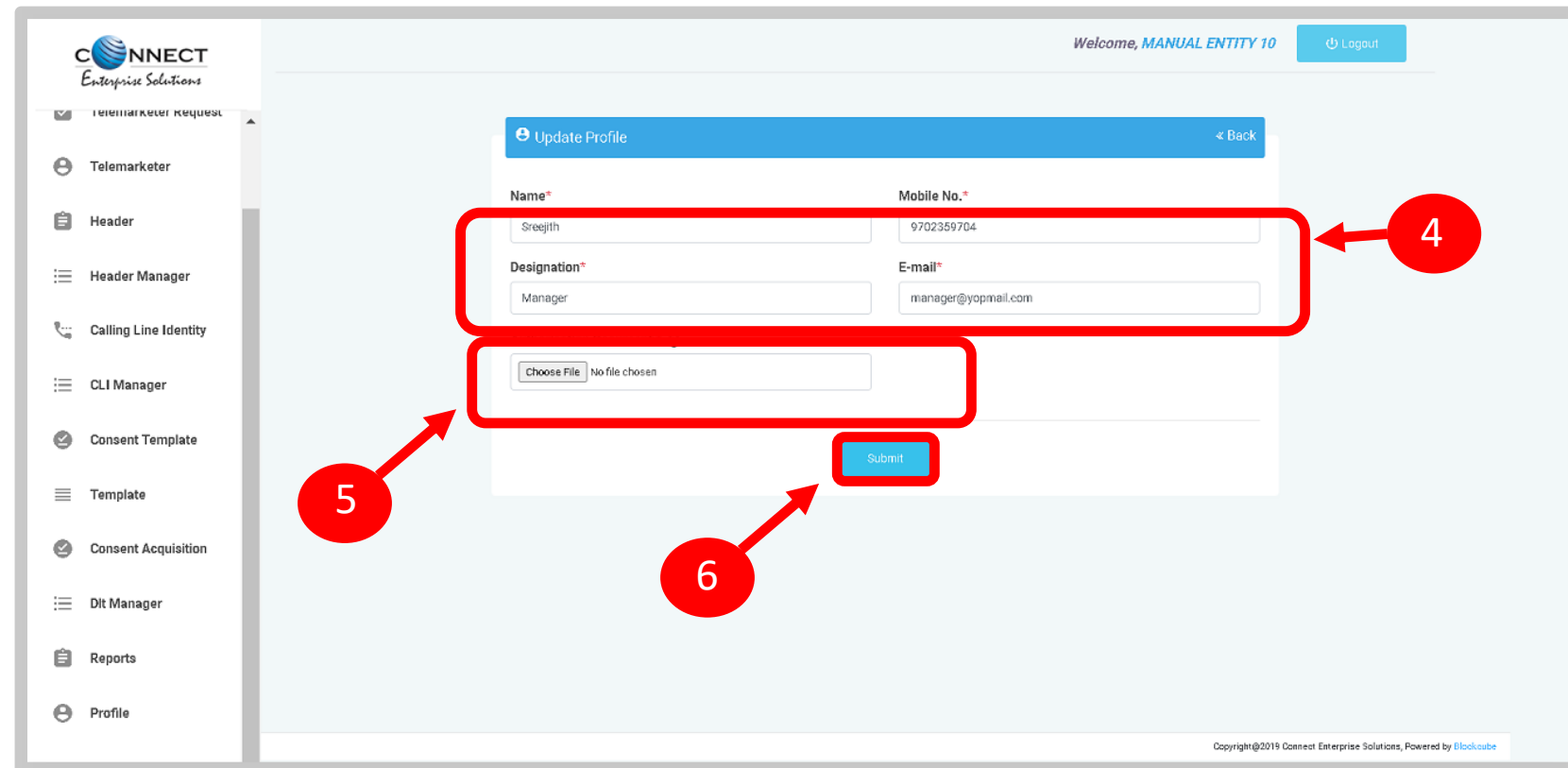
PROFILE UPDATE PAGE

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.

The screenshot shows the 'Reset Your Password' page in the CONNECT Enterprise Solutions application. The page has a light blue header with the logo and a 'Logout' button. A sidebar on the left lists various menu items. The main content area contains a form with the following elements:

- A blue header bar with a gear icon, the text 'Reset Your Password', and a '< Back' link.
- A 'Current Password *' section with a text input field labeled 'Enter Current Password'. A red circle with the number 7 points to this field.
- A 'New Password *' section with a text input field labeled 'Enter Password'. A red circle with the number 8 points to this field.
- A 'Confirm Password *' section with a text input field labeled 'Confirm Password'. A red circle with the number 8 points to this field.
- A blue 'Submit' button. A red circle with the number 9 points to this button.

At the bottom right of the page, there is a small copyright notice: 'Copyright © 2019 Connect Enterprise Solutions, Powered by Blockcube'.

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 !