



Welcome to Connect Enterprise Solutions

# USER MANUAL TELEMARKETER

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## WEBSITE / LANDING PAGE

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

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

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

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

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



# REGISTRATION

## REGISTRATION – SELECT TYPE OF REGISTRATION

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



*A legal entity or person, who on behalf of entity or entities is connected with telecom service provider directly or indirectly for the purpose of aggregation or delivery or both for SMS or voice communication.*

**2** Click **Next** button for further steps towards registration.





# REGISTRATION - TELEMARKETER 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 Telemarketer.

5

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

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

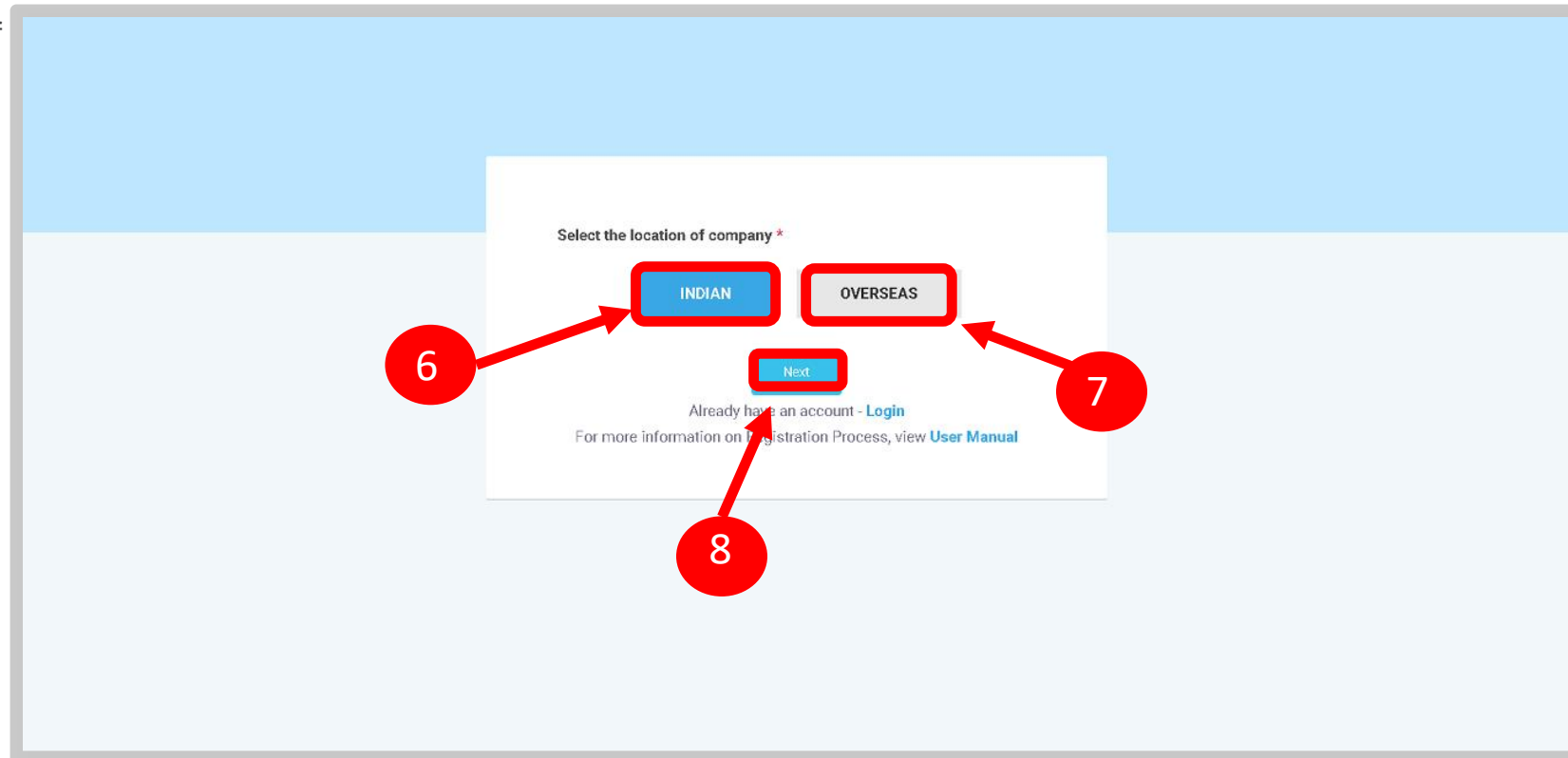


## REGISTRATION - SELECT COMPANY LOCATION

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.



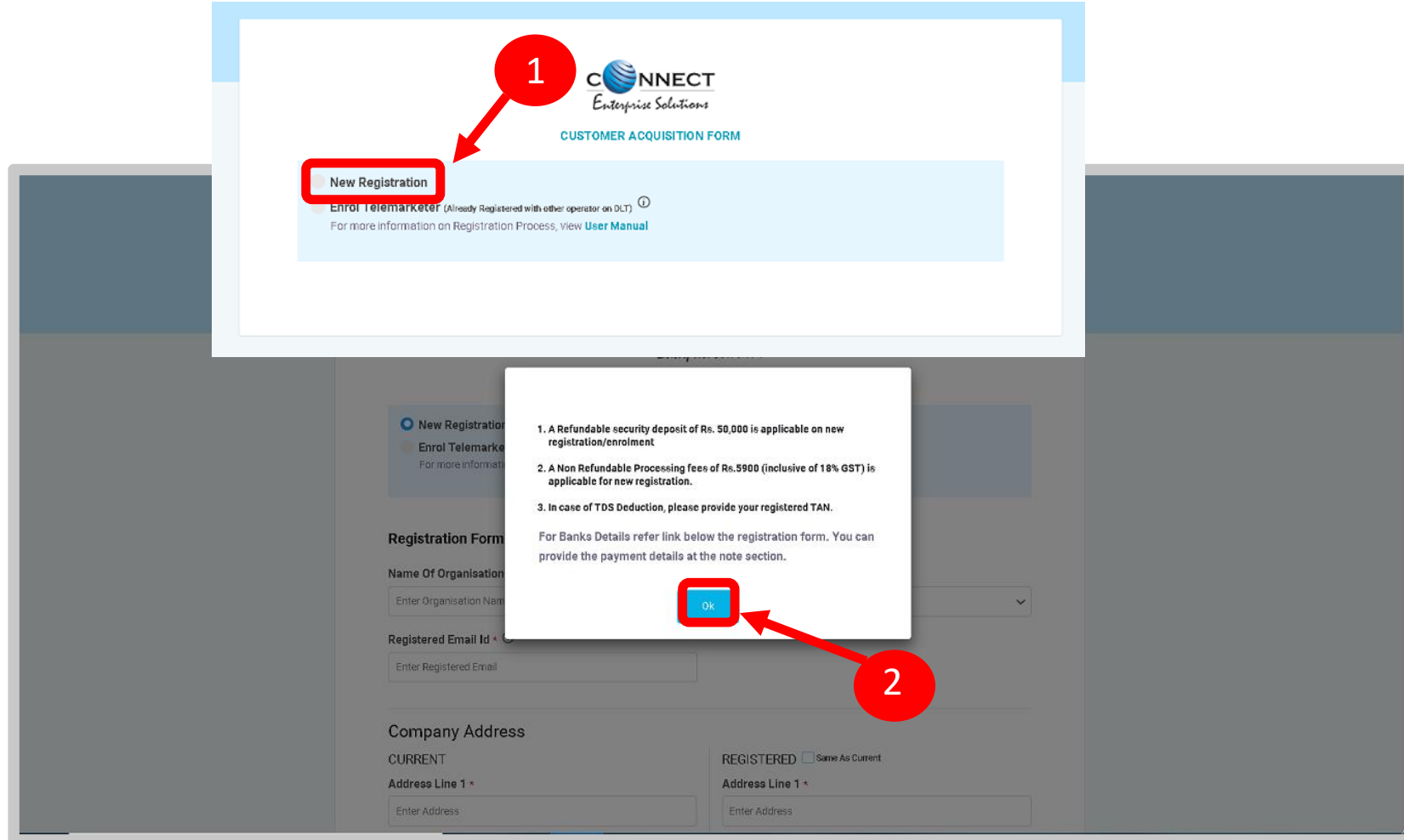
# NEW TELEMARKETER REGISTRATION

## NEW TELEMARKETER 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.



**1**

**2**

**1. A Refundable security deposit of Rs. 50,000 is applicable on new registration/enrolment**

**2. A Non Refundable Processing fees of Rs.5900 (inclusive of 18% GST) is applicable for new registration.**

**3. In case of TDS Deduction, please provide your registered TAN.**

For Banks Details refer link below the registration form. You can provide the payment details at the note section.

**Ok**

**REGISTRATION FORM**

**Name Of Organisation**  
Enter Organisation Name

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

**Company Address**

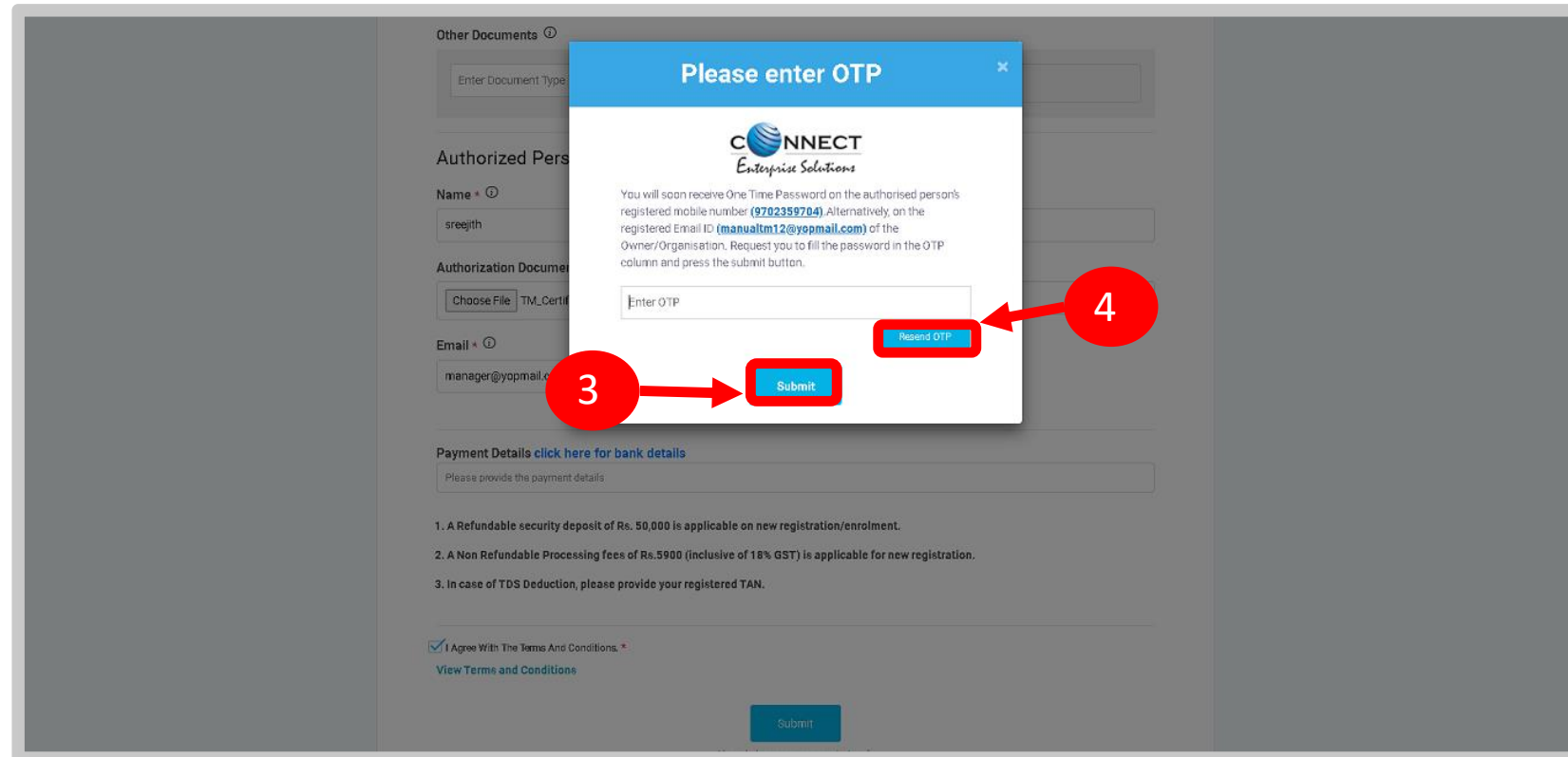
**CURRENT**  
**Address Line 1 \***  
Enter Address

**REGISTERED**  Same As Current  
**Address Line 1 \***  
Enter Address

# NEW TELEMARKETER 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 TELEMARKETER REGISTRATION - EMAIL CONFIRMATION LINK

5

After verifying OTP, a verification link will be sent to your registered email Id.

Click **OK** button once you read the message and validate your mail by clicking the verification link received on your registered email id.

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

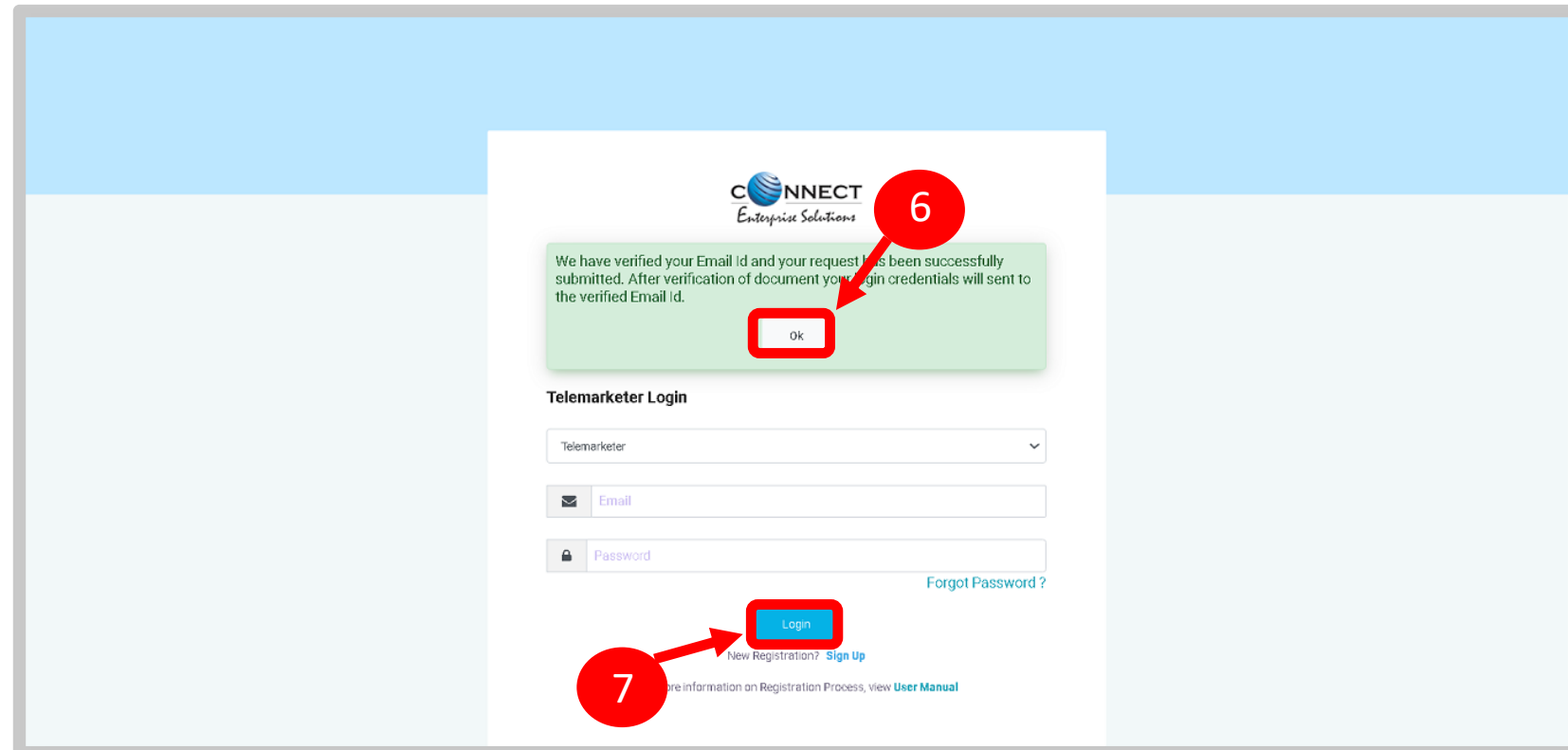
The screenshot shows a registration form with several sections: 'Other Documents', 'Authorized Person Information', 'Authorization Document', 'Email', 'Payment Details', and a list of terms and conditions. A green notification box at the top says 'OTP verified successfully'. A white modal dialog box is overlaid on the form, containing the text: 'We have sent an email verification link on your registered company email id manualtm12@yopmail.com. Please verify your email id by clicking on the link provided. In case you do not find your email verification request in the inbox, please check your spam folder.' A red circle with the number '5' and a red arrow points to the 'OK' button in the modal dialog.

# NEW TELEMARKETER 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 Telemarketer portal and Click **Login**



# ENROLL TELEMARKETER (ALREADY REGISTERED)

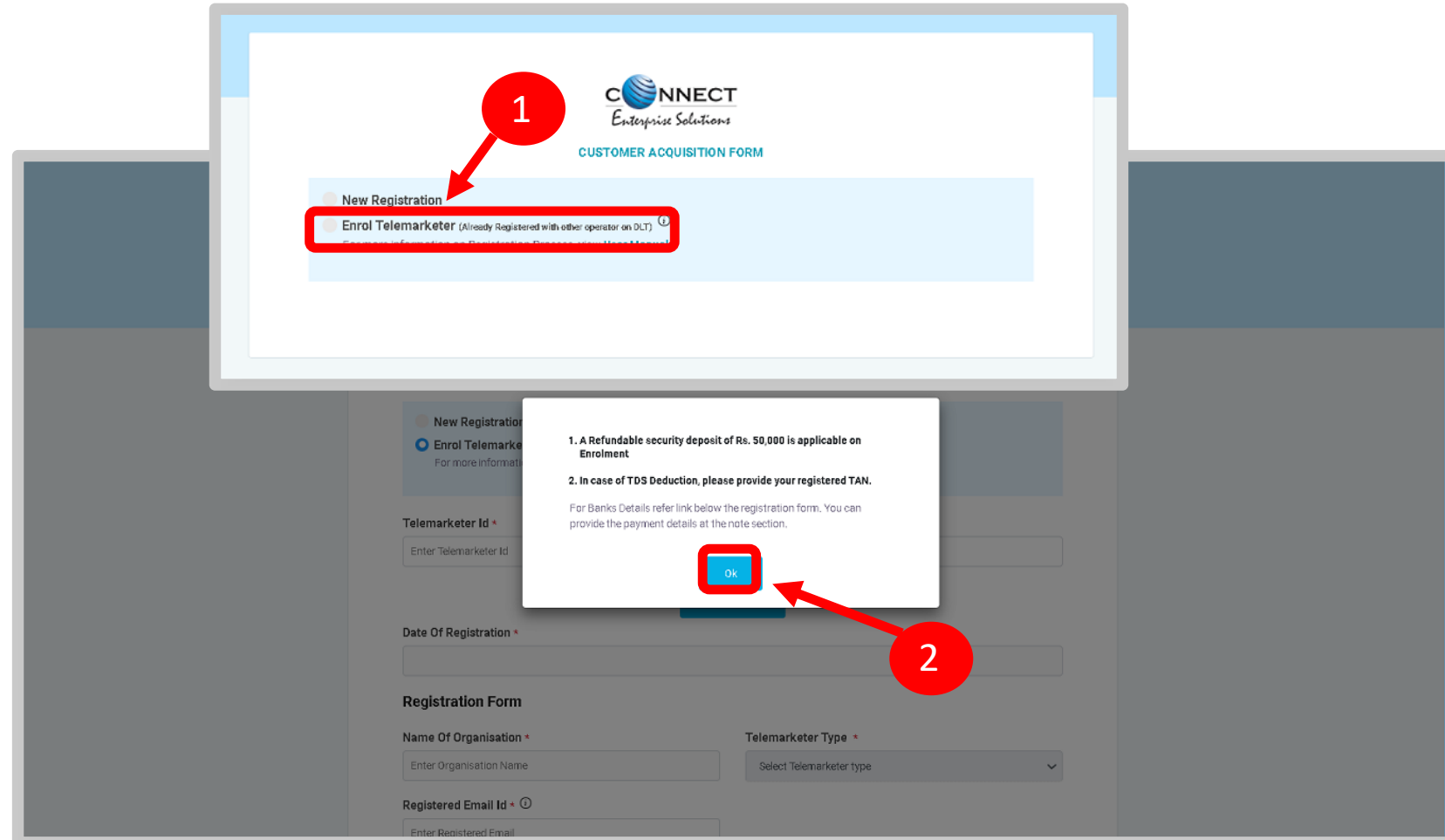


## TELEMARKETER ENROLMENT – INITIATION

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

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

**2** After Selecting Enrol Telemarketer. Confirm the Payment terms by Clicking **OK** button.



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' and 'Enrol Telemarketer (Already Registered with other operator on DLT)'. A red circle with the number '1' points to the 'Enrol Telemarketer' option, which is also highlighted with a red rectangular box. Below these options, there is a 'Telemarketer Id' input field with a placeholder 'Enter Telemarketer Id'. A modal dialog box is overlaid on the form, containing the following text:

- 1. A Refundable security deposit of Rs. 50,000 is applicable on Enrolment
- 2. In case of TDS Deduction, please provide your registered TAN.

Below the text in the modal, there is a note: 'For Banks Details refer link below the registration form. You can provide the payment details at the note section.' At the bottom of the modal, there is a blue 'OK' button, which is highlighted with a red circle and the number '2'.

Below the modal, the 'Registration Form' section is visible, including fields for 'Name Of Organisation', 'Registered Email Id', and 'Telemarketer Type'.

# TELEMARKETER ENROLMENT – SUBMISSION OF TM ID

3

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

**CONNECT**  
Enterprise Solutions  
CUSTOMER ACQUISITION FORM

New Registration  
 Enrol Telemarketer (Already Registered with other operator on DLT) ⓘ  
For more information on Registration Process, view [User Manual](#)

**Telemarketer Id \***  
Enter Telemarketer Id

**Date Of Registration \***

**Registration Form**

**Name Of Organisation \***  **Telemarketer Type \***

**Registered Email Id \*** ⓘ

**Company Address**

CURRENT REGISTERED Same As Current

3

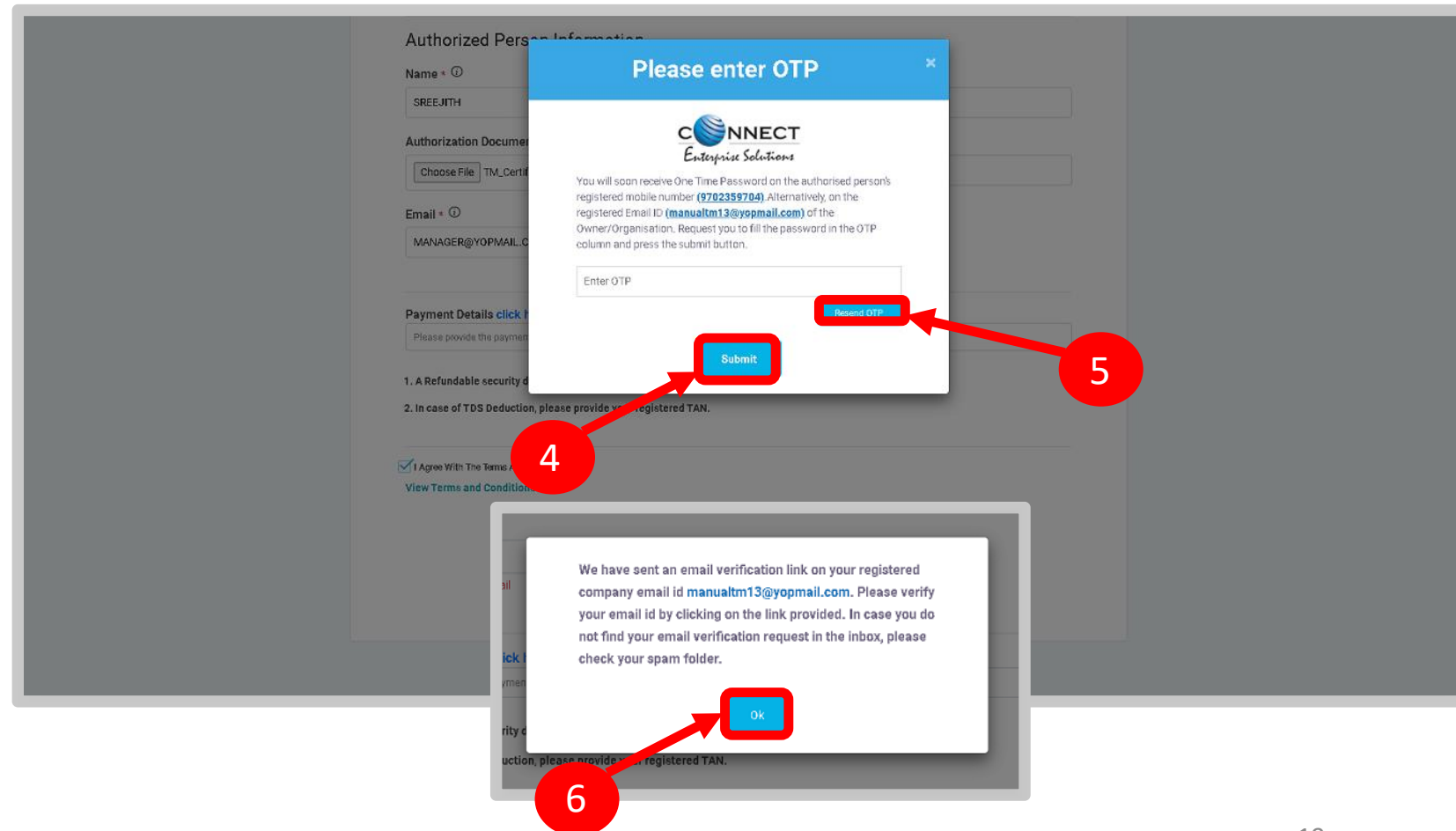
## TELEMARKETER ENROLMENT – OTP /EMAIL VERIFICATION PROCESS

**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.

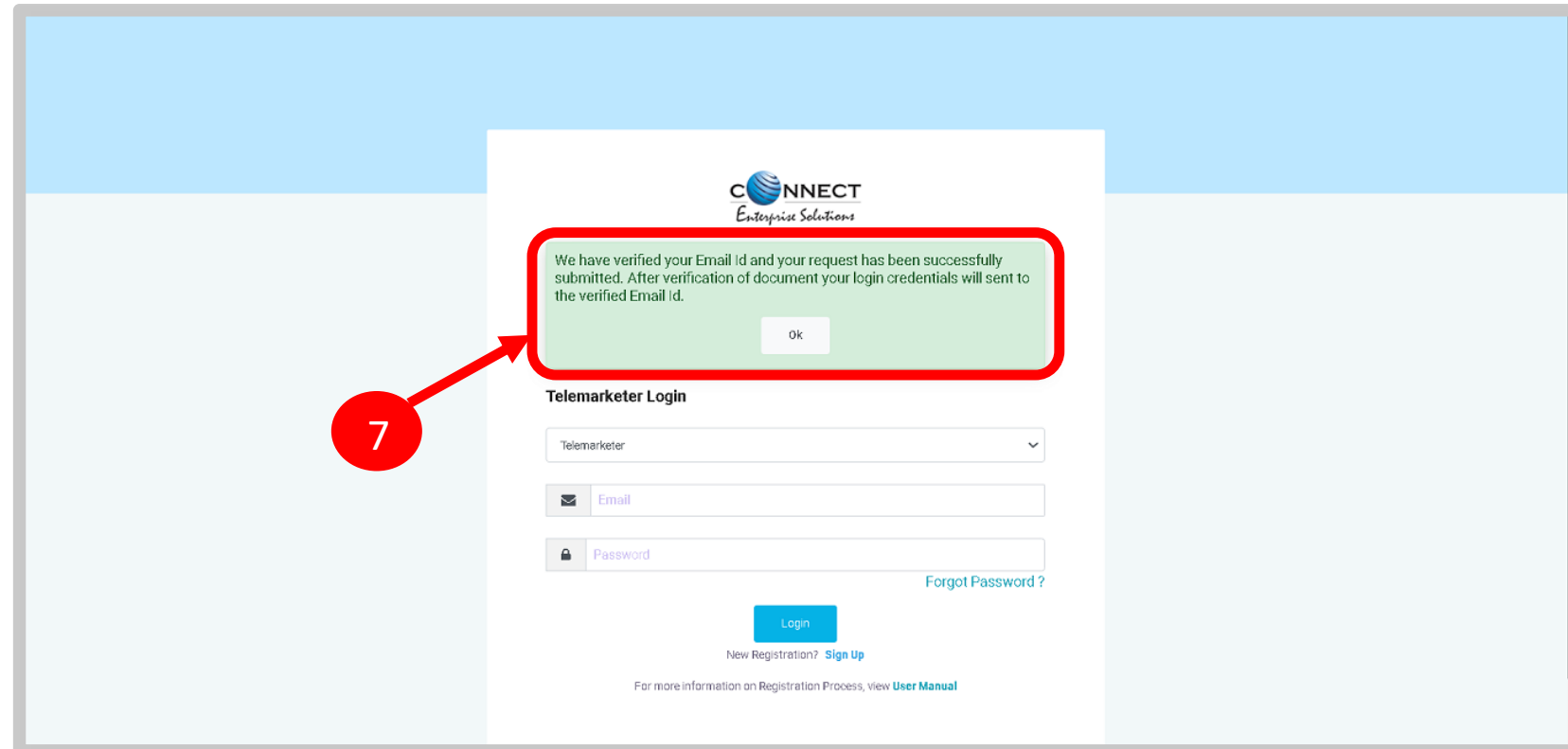
Please check your email inbox as well as spam folder for the verification link.



# TELEMARKETER ENROLMENT - SUCCESSFUL REQUEST SUBMISSION

**7** 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.



# TELEMARKETER ENROLMENT - LOGIN PANEL

8

If you already registered as Telemarketer, put your Email ID & Password and Click **Login** Button to access the panel.

The screenshot displays the 'Telemarketer Login' interface. At the top center is the 'CONNECT Enterprise Solutions' logo. Below it, the title 'Telemarketer Login' is followed by a dropdown menu labeled 'Telemarketer'. The main form area contains three input fields: 'Email' (with an envelope icon), 'Password' (with a lock icon), and a 'Forgot Password?' link. A red rounded rectangle highlights the 'Email' and 'Password' fields. Below these fields is a blue 'Login' button, which is also highlighted with a red rounded rectangle. A red arrow points from a red circle containing the number '8' to the 'Login' button. At the bottom of the form, there are links for 'New Registration? Sign Up' and a note: 'For more information on Registration Process, view User Manual'.

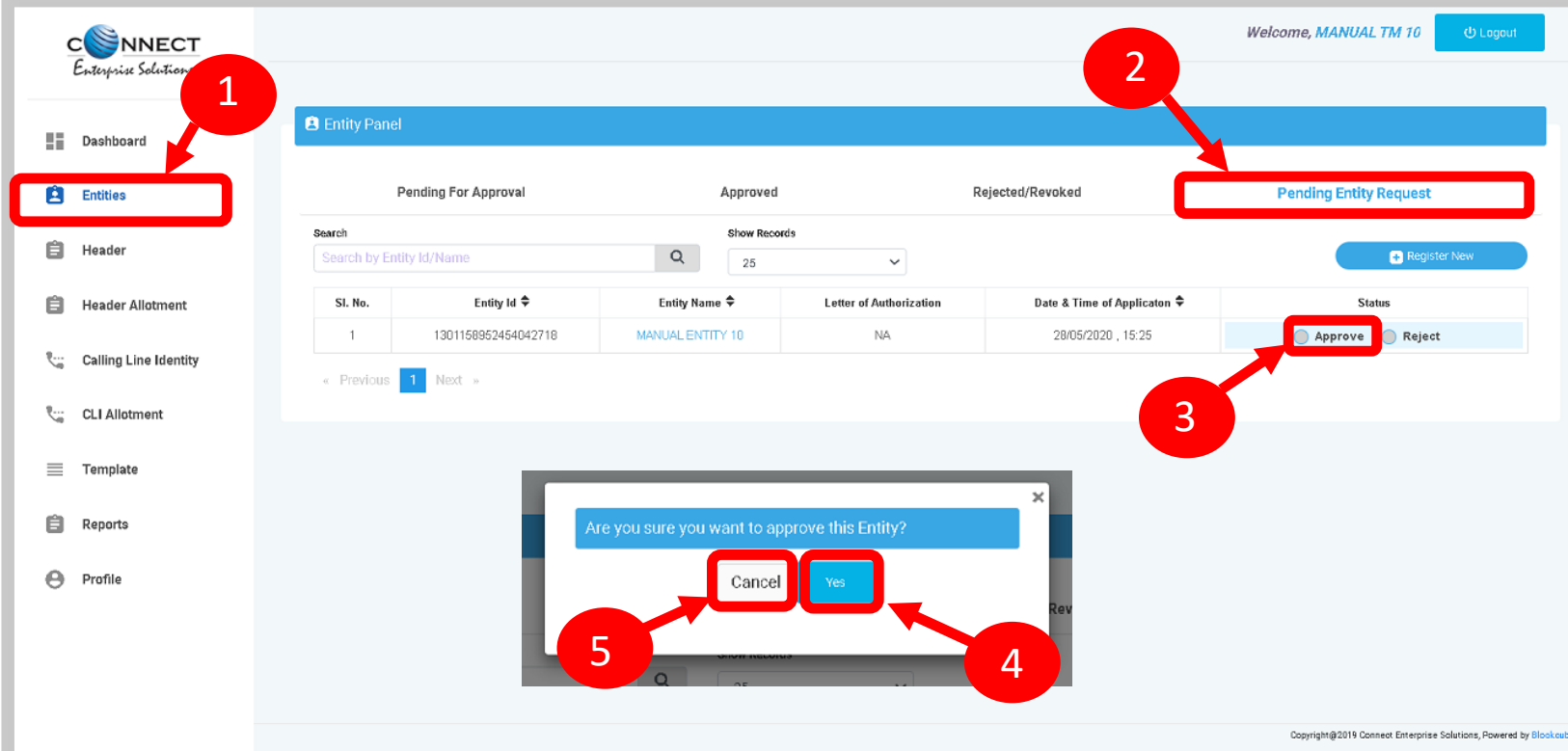
8

# ENTITY REQUEST APPROVAL

## ENTITY REQUEST APPROVAL - PROCESS

To associate with Telemarketer for commercial communication Entities will send an online request for approval to the Telemarketer from their respective Entity portal. To view the Request:

- 1 Select **Entities** Tab from the Sidebar
- 2 Click on **Pending Entity Request** to view the pending request sent by Entities for association.
- 3 Select **Approve** radio button to approve the request
- 4 A pop-up will appear to confirm the action, press **Yes** to approve.
- 5 If you do not want to approve press **Cancel**.



The screenshot displays the 'Entity Panel' in the CONNECT Enterprise Solutions system. The sidebar on the left contains navigation options: Dashboard, **Entities** (1), Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main content area shows a table of pending requests. The 'Pending Entity Request' link (2) is highlighted. The table below has the following data:

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status
1	1301158952454042718	MANUAL ENTITY 10	NA	28/05/2020 , 15:25	<input checked="" type="radio"/> Approve <input type="radio"/> Reject

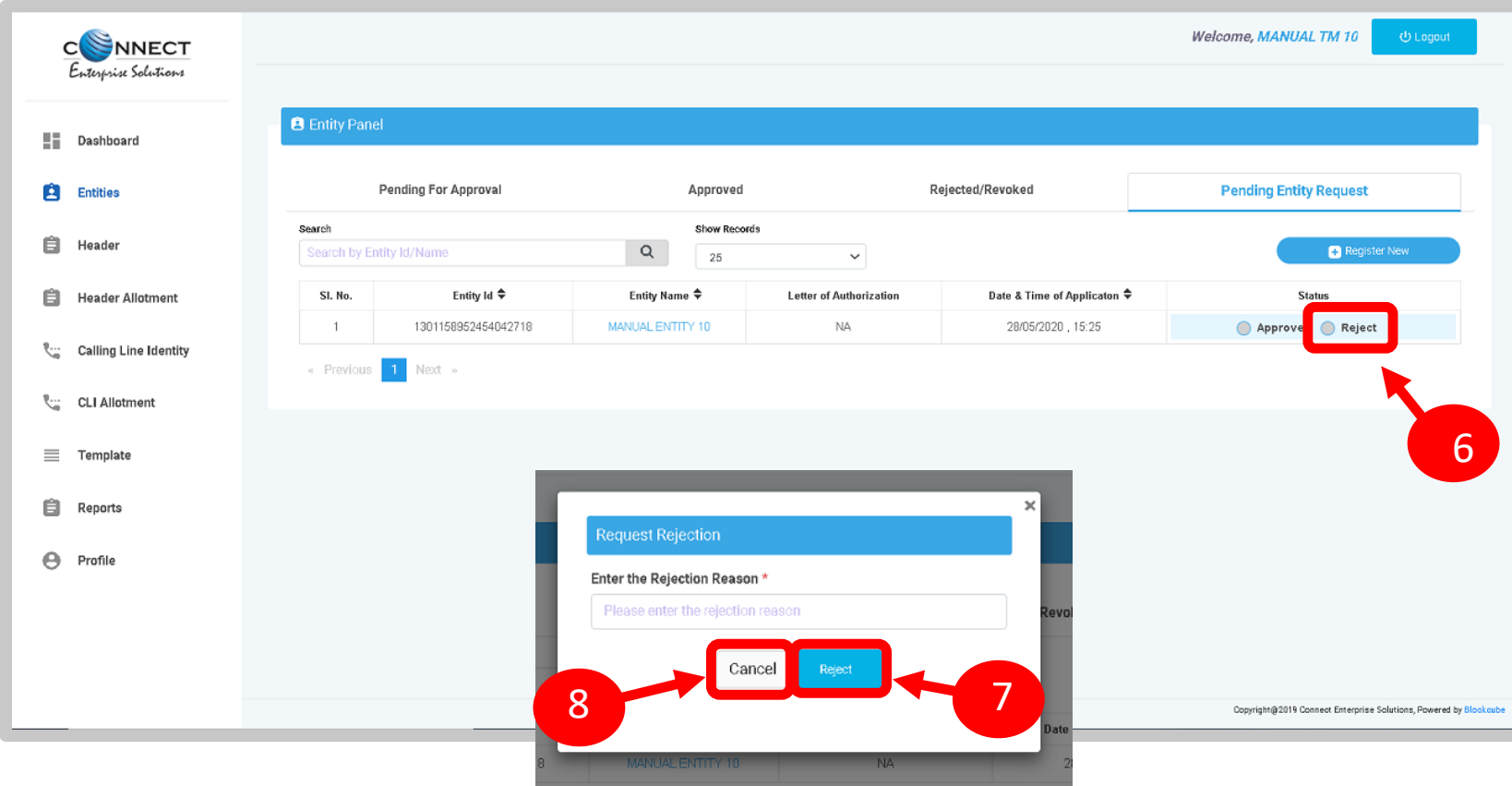
A confirmation pop-up dialog is shown at the bottom, asking 'Are you sure you want to approve this Entity?'. It features 'Cancel' (5) and 'Yes' (4) buttons.

## ENTITY REQUEST APPROVAL - REJECTION

6 If the user want to reject the request received from the Entity then press **Reject** radio button

7 A pop-up will appear to confirm the rejection process. Enter the rejection remarks and press **Reject** button.

8 In case the user wants to stop the rejection process, press **Cancel** button



The screenshot displays the 'Entity Panel' in the CONNECT Enterprise Solutions application. The panel shows a table of 'Pending Entity Request' records. The first record is highlighted, and the 'Reject' radio button in the 'Status' column is selected. A 'Request Rejection' pop-up dialog is open, prompting the user to 'Enter the Rejection Reason \*'. The dialog has 'Cancel' and 'Reject' buttons. Red circles with numbers 6, 7, and 8 are overlaid on the image to indicate the steps: 6 points to the 'Reject' radio button, 7 points to the 'Reject' button in the pop-up, and 8 points to the 'Cancel' button in the pop-up.

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status
1	1301158952454042718	MANUAL ENTITY 10	NA	28/05/2020 , 15:25	<input type="radio"/> Approve <input checked="" type="radio"/> <b>Reject</b>



## ENTITY REQUEST APPROVAL – STATUS

9

Approved Entities can be viewed in the **Approved** Section of Entities with status as **Active**.

Entity Panel

Pending For Approval **Approved** Rejected/Revoked Pending Entity Request

Search: Search by Entity Id/Name [ ] [Q] Show Records: 25 [v] Register New [ + ]

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status
1	13011589524042718	MANUAL ENTITY 10	[icon]	28/05/2020 , 15:31	Active

« Previous 1 Next »

9

10

Rejected Entities can be viewed in the **Rejected/Revoked** Section of Entities with status as **Active**.

Entity Panel

Pending For Approval Approved **Rejected/Revoked** Pending Entity Request

Search: Search by Entity Id/Name [ ] [Q] Show Records: 25 [v] Status: Rejected [v] Register New [ + ]

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Remarks	Status
1	1301158952454042718	MANUAL ENTITY 10	NA	28/05/2020 , 15:28		Rejected

« Previous 1 Next »

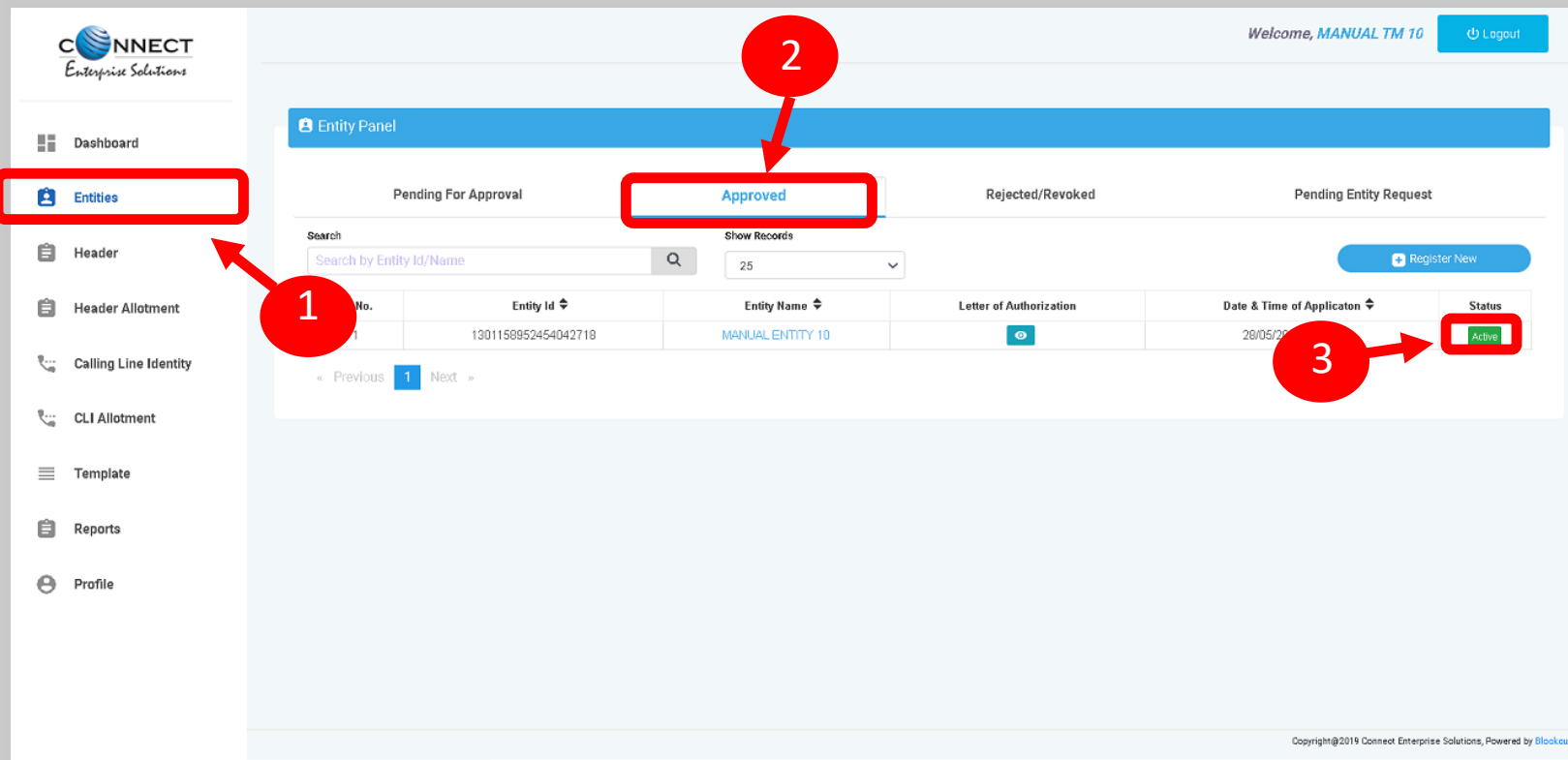
10

# TELEMARKETER – ENTITY REVOCAATION FUNCTION

## TELEMARKETER-ENTITY REVOCATION – ENTITY SELECTION

The Telemarketer can Revoke the business relationship with any of its associated Entities from the DLT panel.

- 1 Choose the **Entities** from the sidebar.
- 2 Select the **Approved** section to view all the active Entities associated with the Telemarketer.
- 3 Click on the **Status** button and profile page will open.

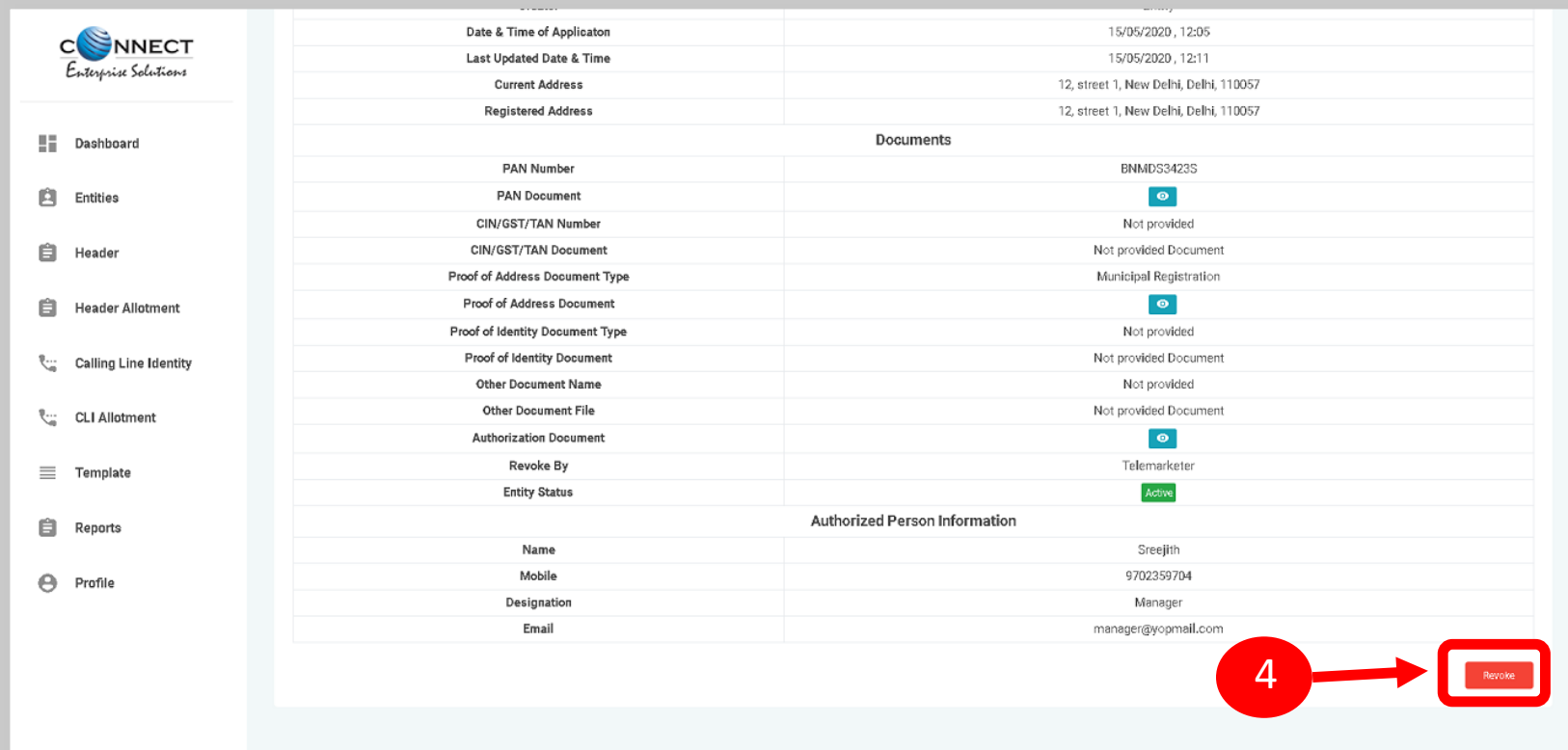


The screenshot displays the 'Entity Panel' in the CONNECT Enterprise Solutions application. The interface includes a sidebar on the left with navigation options: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The 'Entities' option is highlighted with a red box and labeled '1'. The main content area shows a tabbed interface with 'Approved' selected, also highlighted with a red box and labeled '2'. Below the tabs is a search bar and a table of entities. The table has columns for No., Entity Id, Entity Name, Letter of Authorization, Date & Time of Application, and Status. A red box highlights the 'Active' status in the 'Status' column, labeled '3'. A 'Register New' button is visible in the top right of the main area. The footer contains the text 'Copyright © 2019 Connect Enterprise Solutions, Powered by Blockcube'.

## TELEMARKETER-ENTITY REVOCATION – PROFILE PAGE

4

In the Profile page **Revoke** button is provided at the bottom right corner. Click on the button to proceed the revoke function.



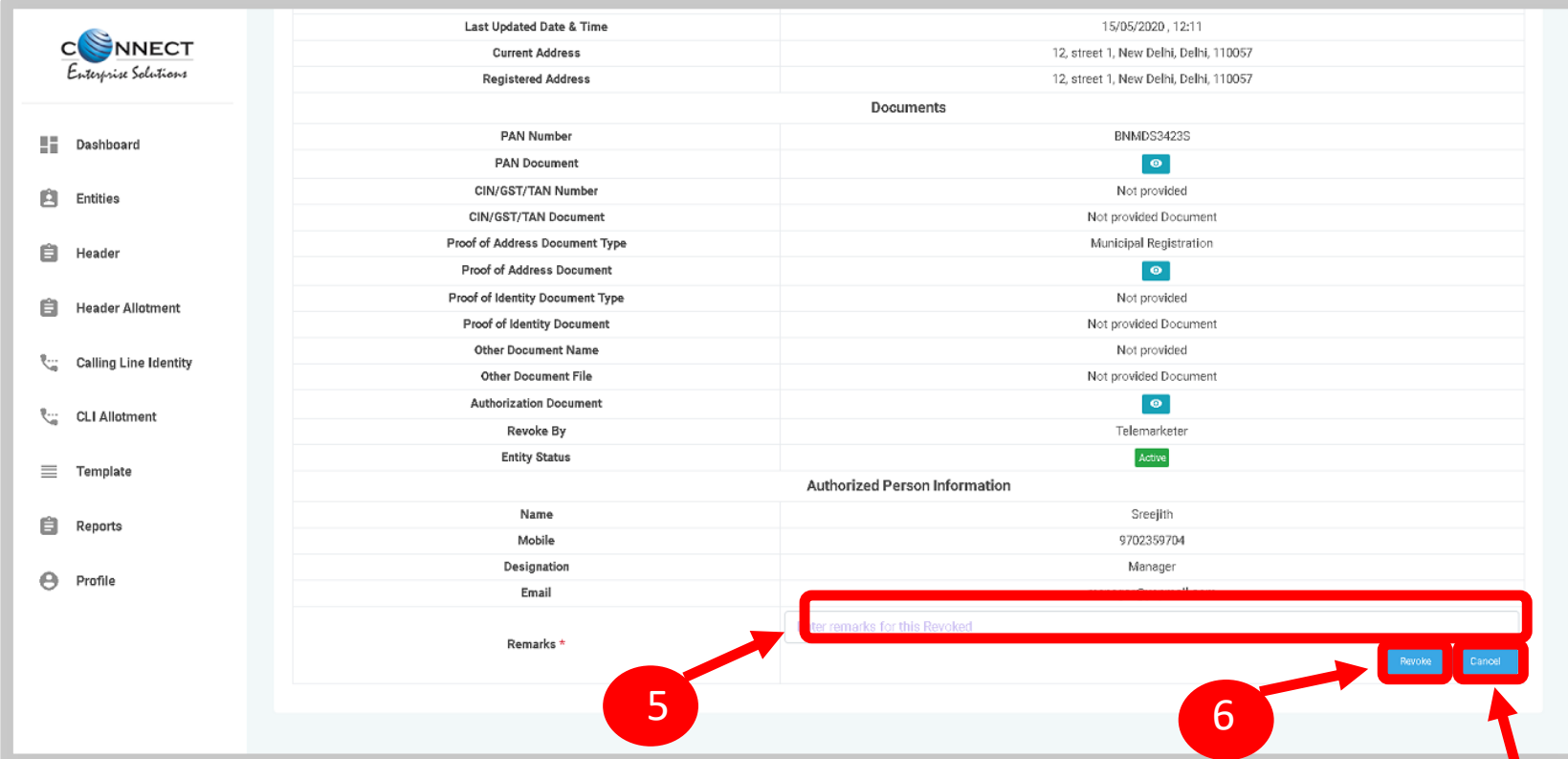
The screenshot displays the 'Profile' page in the CONNECT Enterprise Solutions application. The left sidebar contains navigation options: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main content area shows a table with the following data:




Date & Time of Application	15/05/2020 , 12:05
Last Updated Date & Time	15/05/2020 , 12:11
Current Address	12, street 1, New Delhi, Delhi, 110057
Registered Address	12, street 1, New Delhi, Delhi, 110057
<b>Documents</b>	
PAN Number	BNMDS34235
PAN Document	
CIN/GST/TAN Number	Not provided
CIN/GST/TAN Document	Not provided Document
Proof of Address Document Type	Municipal Registration
Proof of Address Document	
Proof of Identity Document Type	Not provided
Proof of Identity Document	Not provided Document
Other Document Name	Not provided
Other Document File	Not provided Document
Authorization Document	
Revoke By	Telemarketer
Entity Status	Active
<b>Authorized Person Information</b>	
Name	Sreejith
Mobile	9702359704
Designation	Manager
Email	manager@yopmail.com

In the bottom right corner of the page, a red circle with the number '4' and an arrow points to a red 'Revoke' button.

## TELEMARKETER-ENTITY REVOCATION – REMARKS

- 5** **Remarks** column will appear which is mandatory before proceeding to the final revocation process.
- 6** Once the Remarks are filled then press the **Revoke** button provided.
- 7** If the revocation process needs to be cancelled the same can be done by pressing the **Cancel** button.



CONNECT Enterprise Solutions	
Last Updated Date & Time	15/05/2020, 12:11
Current Address	12, street 1, New Delhi, Delhi, 110057
Registered Address	12, street 1, New Delhi, Delhi, 110057
<b>Documents</b>	
PAN Number	BNMDS3423S
PAN Document	
CIN/GST/TAN Number	Not provided
CIN/GST/TAN Document	Not provided Document
Proof of Address Document Type	Municipal Registration
Proof of Address Document	
Proof of Identity Document Type	Not provided
Proof of Identity Document	Not provided Document
Other Document Name	Not provided
Other Document File	Not provided Document
Authorization Document	
Revoke By	Telemarketer
Entity Status	<span style="color: green;">Active</span>
<b>Authorized Person Information</b>	
Name	Sreejith
Mobile	9702359704
Designation	Manager
Email	
Remarks *	<input type="text" value="Enter remarks for this Revoked"/>
<input type="button" value="Revoke"/> <input type="button" value="Cancel"/>	

## TELEMARKETER-ENTITY REVOCATION – CONFIRMATION

8

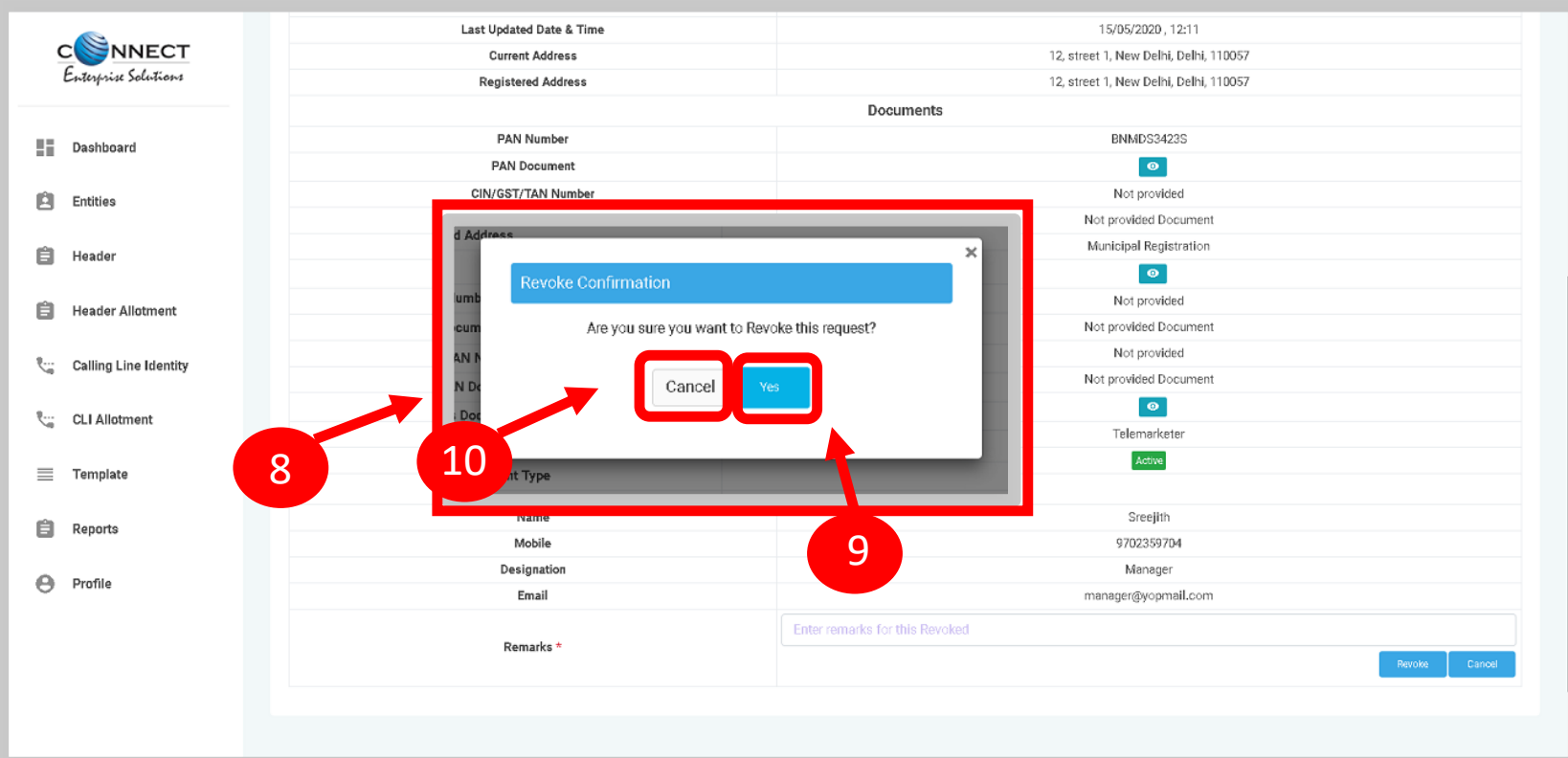
A **Pop-up** will appear to confirm the revocation process.

9

Press **Yes** to confirm the action.

10

Press **Cancel** to stop the revocation process.



The screenshot displays the user interface for a Telemarketer-Entity. A sidebar on the left contains navigation options: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main content area shows a profile for a Telemarketer with the following details:

- Last Updated Date & Time: 15/05/2020, 12:11
- Current Address: 12, street 1, New Delhi, Delhi, 110057
- Registered Address: 12, street 1, New Delhi, Delhi, 110057
- PAN Number: BNMDS3423S
- PAN Document: Not provided
- CIN/GST/TAN Number: Not provided
- Municipal Registration: Not provided
- Telemarketer: Active
- Name: Sreejith
- Mobile: 9702359704
- Designation: Manager
- Email: manager@yopmail.com

A 'Revoke Confirmation' pop-up dialog is centered on the screen, containing the text 'Are you sure you want to Revoke this request?' and two buttons: 'Cancel' and 'Yes'. Red annotations highlight the dialog (8), the 'Yes' button (9), and the 'Cancel' button (10).

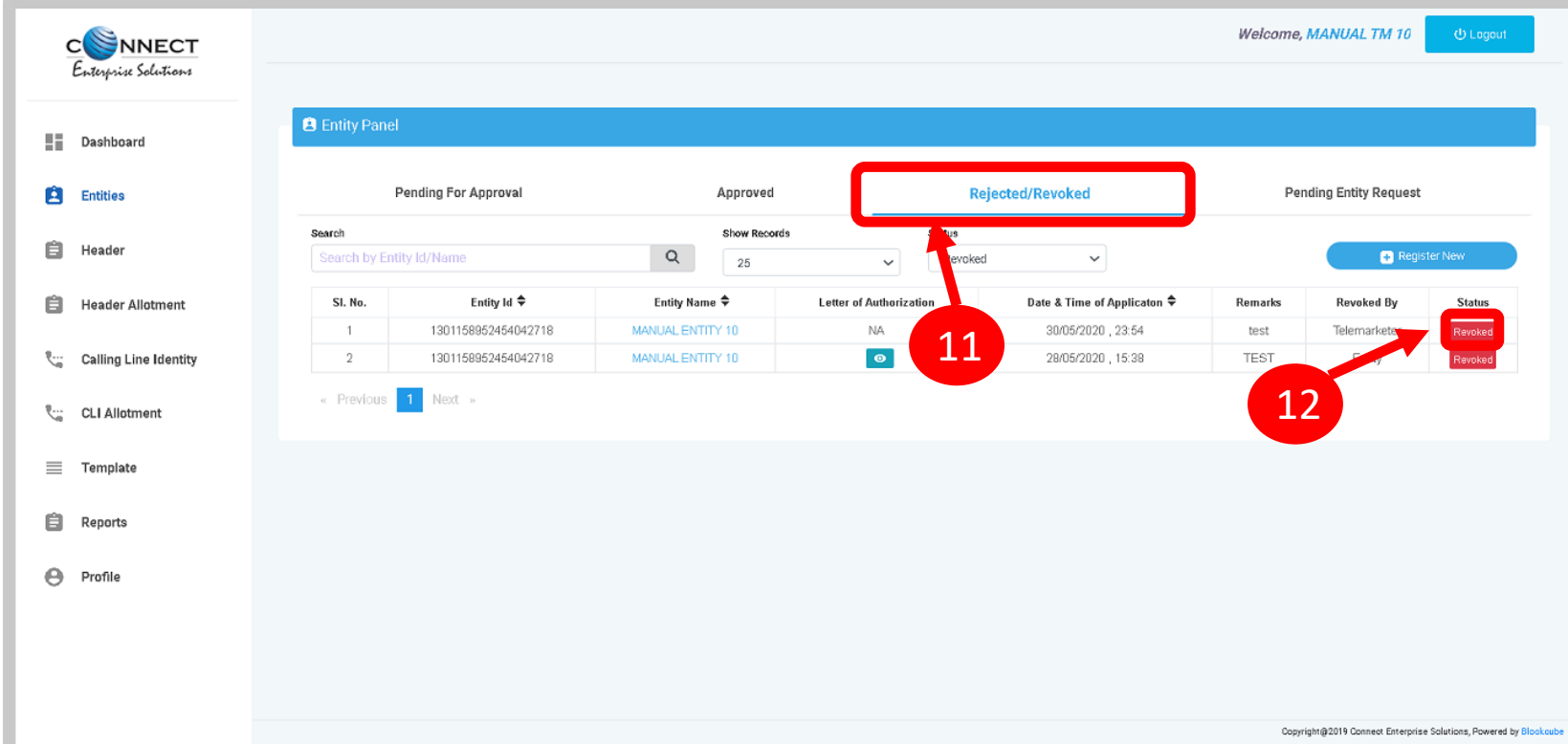
## TELEMARKETER-ENTITY REVOCATION – STATUS

11

To see the revoked entries select the **Rejected/Revoked** section.

12

The revoked Entities will be visible in the table with **Revoked** status.



The screenshot shows the 'Entity Panel' with four tabs: 'Pending For Approval', 'Approved', 'Rejected/Revoked', and 'Pending Entity Request'. The 'Rejected/Revoked' tab is highlighted with a red box and labeled '11'. Below the tabs is a search bar and a 'Show Records' dropdown set to '25'. A table displays two entries with 'Revoked' status, labeled '12'.

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Remarks	Revoked By	Status
1	1301158952454042718	MANUAL ENTITY 10	NA	30/05/2020 , 23:54	test	Telemarketer	Revoked
2	1301158952454042718	MANUAL ENTITY 10		28/05/2020 , 15:38	TEST	Entity	Revoked

# HEADER

## P – Promotional -

Messages which are purely promotional in nature send to all the prospects in the database by an Entity basis on their 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

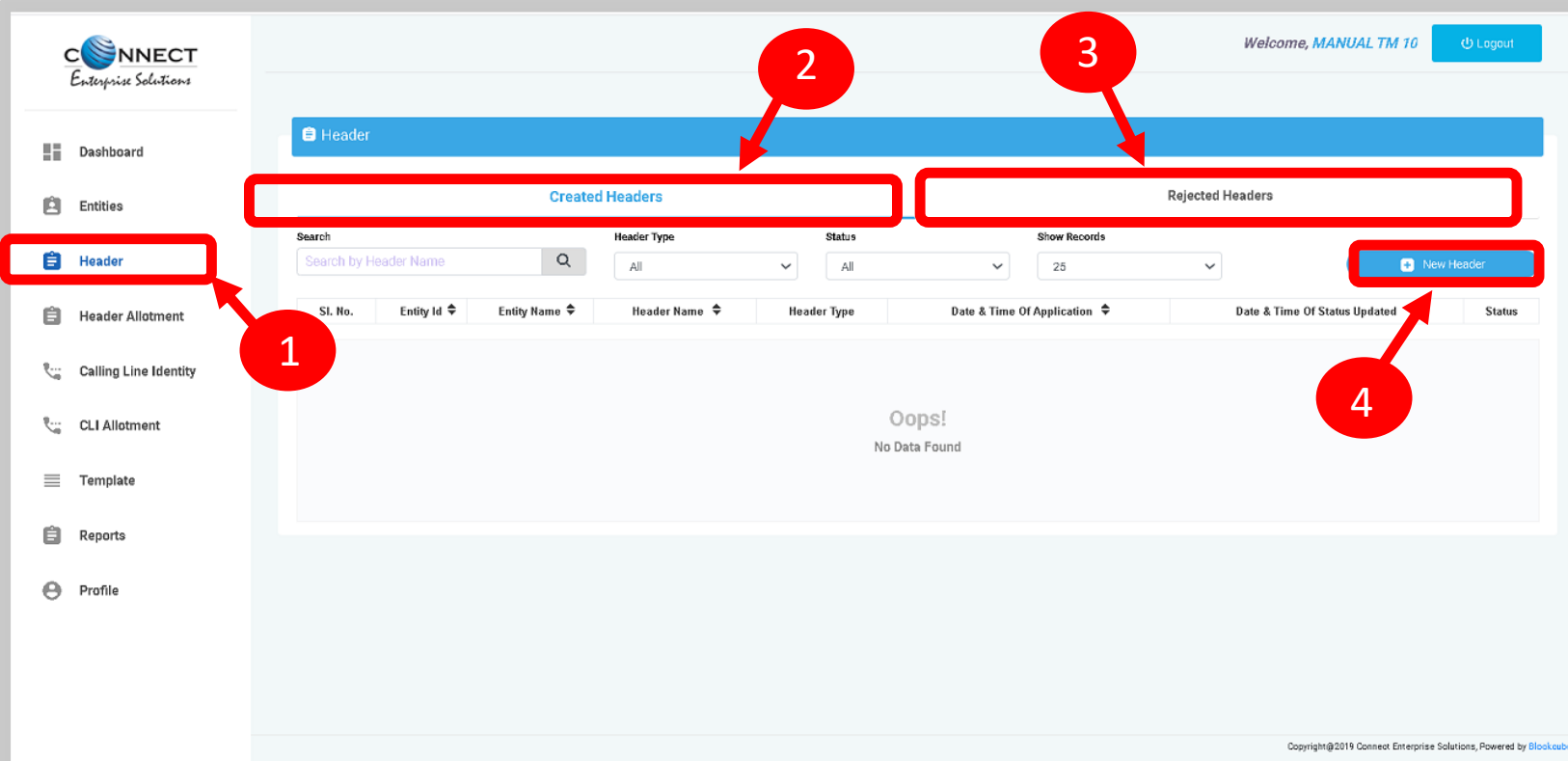
Service Explicit - Service messages that are send by the Entity which are promotional in nature but send with prior consent. Ex : New offers for the Entity )



## HEADER CREATION – HEADER SECTION

Telemarketers can create Headers on behalf of their Principle Entities for commercial communication as per the guidelines by TRAI. The process is as follows:

- 1 In the Telemarketer Portal select **Header** from the sidebar.. It will open the Header section.
- 2 **Created Headers** tab shows all the headers which are created by the Telemarketer for their Entities.
- 3 **Rejected Headers** tab shows all the headers which were sent for approval but rejected by Operator.
- 4 To create New Header click on the **New Header** tab as shown in the panel.

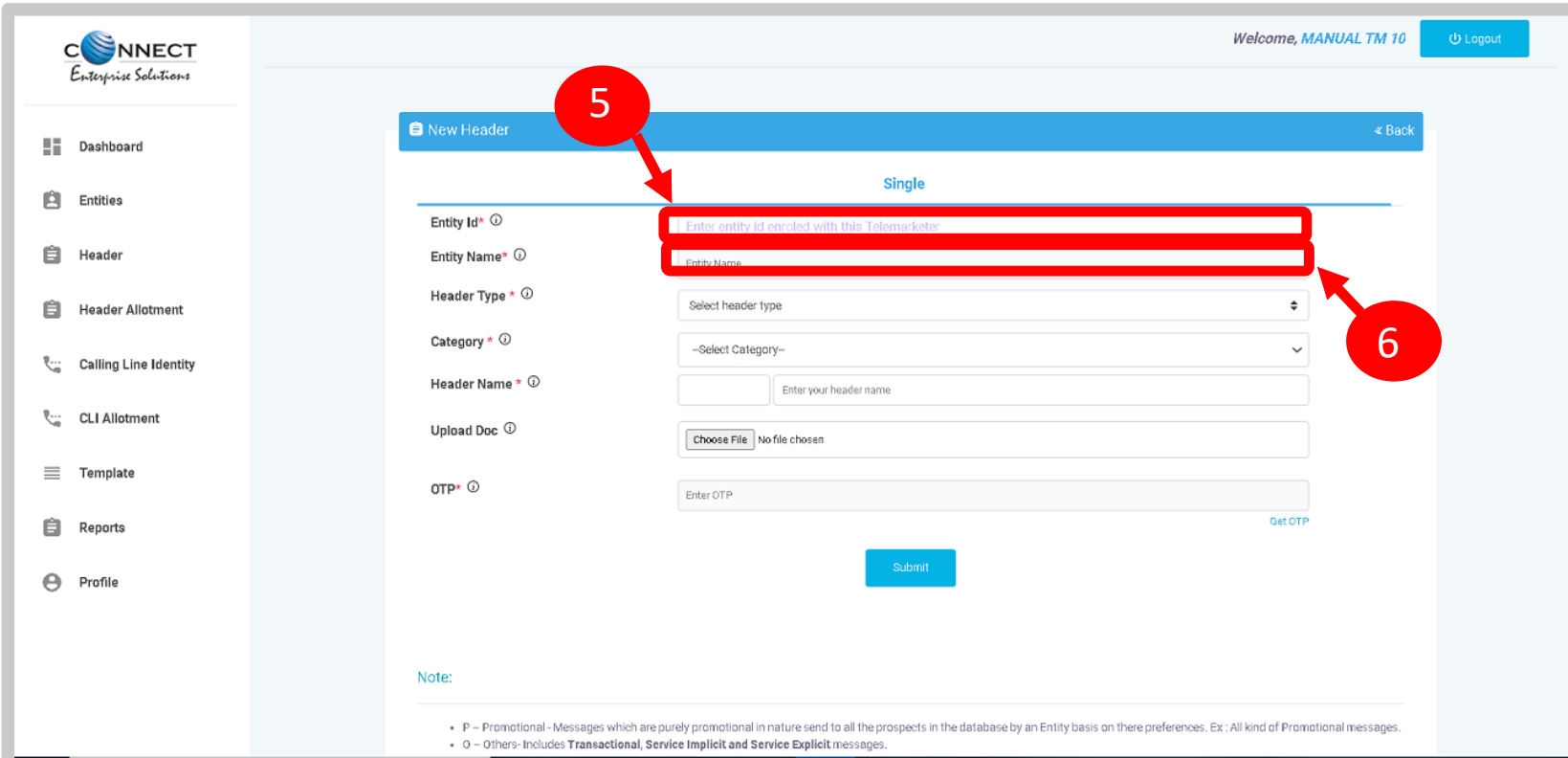


The screenshot shows the 'Header' section of the CONNECT Enterprise Solutions portal. The interface includes a sidebar on the left with the 'Header' option selected (callout 1). The main content area features a 'Header' tab (callout 2) and two sub-tabs: 'Created Headers' and 'Rejected Headers' (callout 3). Below the tabs is a search and filter section with a search bar, dropdowns for 'Header Type' and 'Status', and a 'Show Records' dropdown. A table with columns for 'Sl. No.', 'Entity Id', 'Entity Name', 'Header Name', 'Header Type', 'Date & Time Of Application', 'Date & Time Of Status Updated', and 'Status' is visible, but it contains no data and displays a 'Oops! No Data Found' message (callout 4). A 'New Header' button is located in the top right corner of the main content area (callout 4).

## HEADER CREATION – SELECTION OF ENTITY

**5** In the **Entity ID** section put a valid ID of the Principle Entity forwhom the user wants to create a header.

**6** **Entity Name** will automatic appear in the Table.



**5**

**6**

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

- 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.

# HEADER CREATION – HEADER TYPE SELECTION

7

select the **Header Type** from the dropdown available.

- Promotional
- Other

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**CONNECT**  
Enterprise Solutions

Dashboard  
Entities  
Header  
Header Allotment  
Calling Line Identity  
CLI Allotment  
Template  
Reports  
Profile

New Header [Back](#)

Single

Entity Id <sup>ⓘ</sup>

Entity Name <sup>ⓘ</sup>

Header Type <sup>ⓘ</sup>   
Select header type  
Promotional  
Other

Category <sup>ⓘ</sup>

Header Name <sup>ⓘ</sup>

Upload Doc <sup>ⓘ</sup>

OTP <sup>ⓘ</sup>  [Get OTP](#)

[Submit](#)

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.

## HEADER CREATION – CATEGORY SELECTION

8

Select the Category before creating the Header from the dropdown list given in the **Category** section.

*Category is optional for othertype of header and mandatory for Promotional.*

**New Header** ← Back

Single

Entity Id\*

Entity Name\*

Category\*

Header Name\*

Upload Doc

OTP\*

**8**

--Select Category--

--Select Category--

Banking/Insurance/Financial products/ credit cards

Real Estate

Education

Health

Consumer goods and automobiles

Communication/Broadcasting/Entertainment/IT

Tourism and Leisure

Food and Beverages

Others

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.

# 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 – REQUEST SUBMISSION

**9** Type in the desired **Header Name** according to your Header Type.

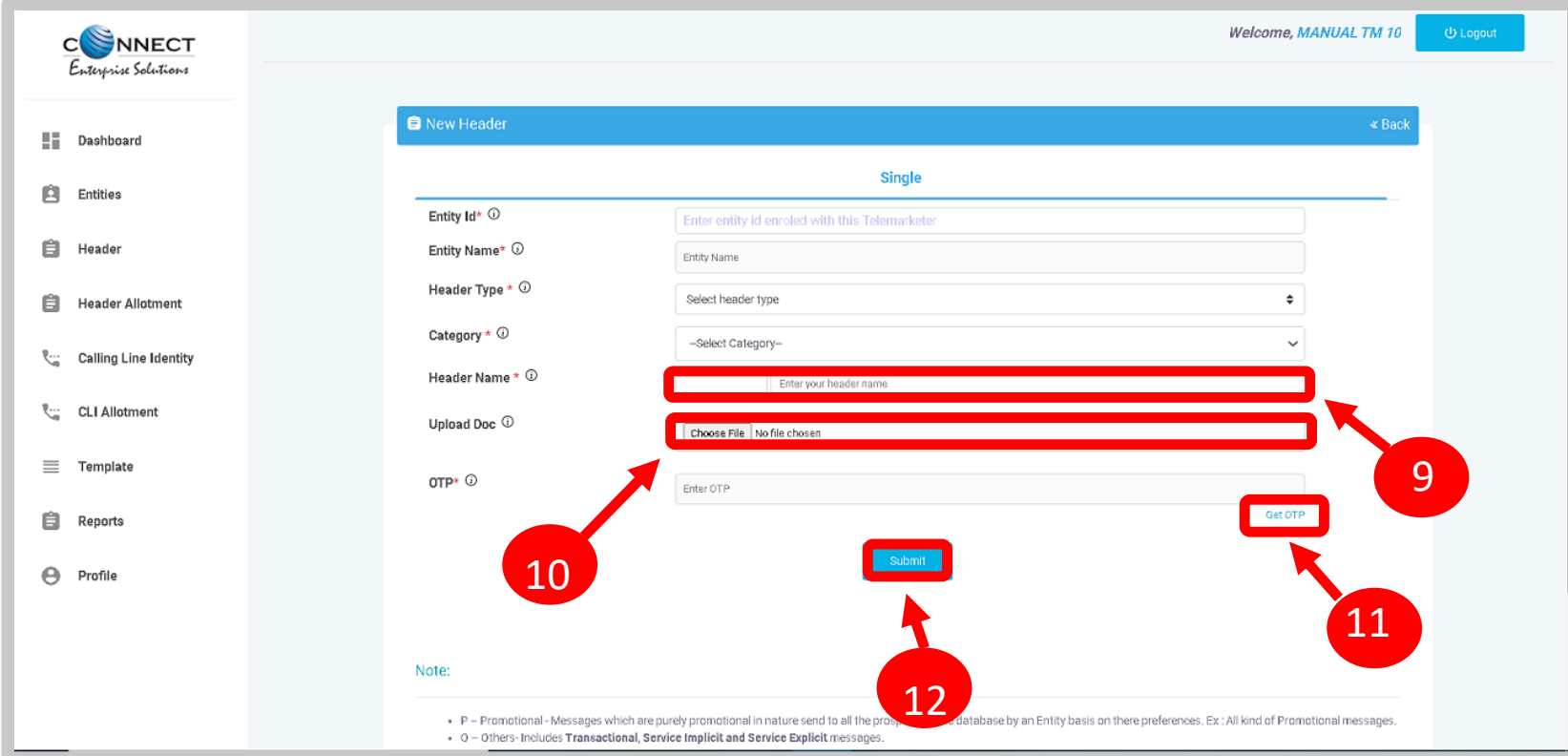
**!** Header Name will be decided by the Entity basis on their business requirements and Entity name. (Eg: Entity Name: HDFC BANK, Header Name: HDFCBK)

**!** 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.

**10** Upload relevant document related to Headers through **Upload** option

**11** Press the **Get OTP** link to receive the One Time Password (OTP) and type it in the OTP column.

**12** Press the **Submit** button to send the Header for approval to the Operator.



The screenshot shows the 'New Header' form in the CONNECT system. The form is titled 'New Header' and has a 'Single' view. The form fields are:

- Entity Id\***: Enter entity id enrolled with this Telemarketer
- Entity Name\***: Entity Name
- Header Type\***: Select header type
- Category\***: -Select Category-
- Header Name\***: Enter your header name (highlighted with a red circle 9)
- Upload Doc**: Choose File | No file chosen (highlighted with a red circle 10)
- OTP\***: Enter OTP

There are two buttons: 'Get OTP' (highlighted with a red circle 11) and 'Submit' (highlighted with a red circle 12). A 'Note' section at the bottom explains the categories:

- P** - Promotional - Messages which are purely promotional in nature send to all the prospect 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.

## HEADER CREATION – REQUEST STATUS

13

The Header send for approval to the Operator will be visible in the Created Header section with **Pending** status.

The screenshot shows the 'Header' management page. The 'Created Headers' section contains a table with the following data:

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263907486	MANUAL ENTITY1	TESTMN	Other	31/05/2020, 00:08	31/05/2020, 00:08	Pending

A red circle highlights the 'Pending' status in the table, with a red arrow pointing to a '13' in a red circle.

14

Once the Operator approves the Header the status will change to **Active** and will be visible in the created headers.

The Header request created for entity by the Telemarketer will fall in both Headers and Header allotment tab with Pending status. Once approved from Operator both the Header and the header allotment are done simultaneously.

The screenshot shows the 'Header' management page after approval. The 'Created Headers' section contains a table with the following data:

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263907486	MANUAL ENTITY1	TESTMN	Other	31/05/2020, 00:08	31/05/2020, 00:09	Active

A red circle highlights the 'Active' status in the table, with a red arrow pointing to a '14' in a red circle.

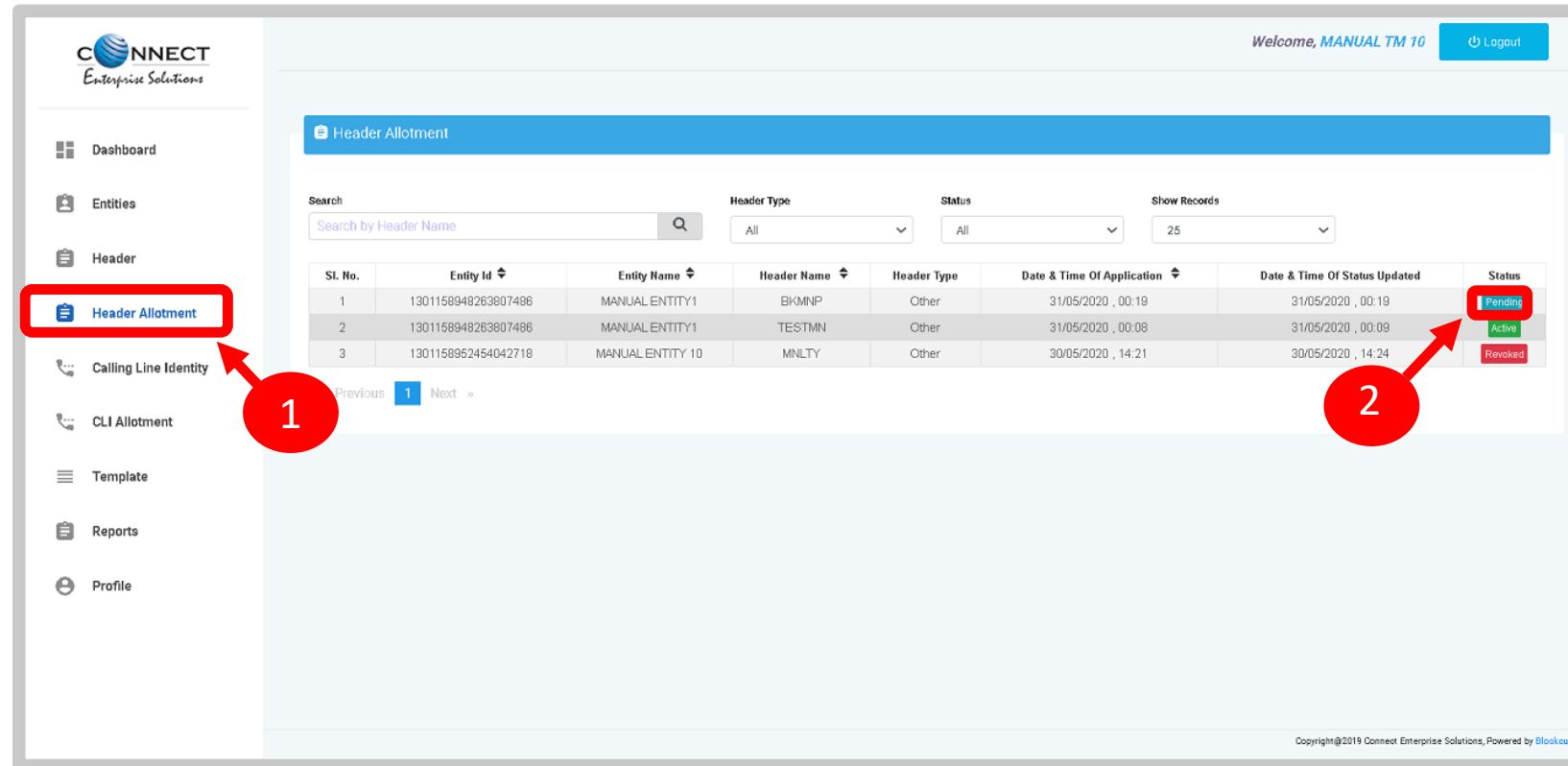
# HEADER ALLOTMENT APPROVAL



## HEADER ALLOTMENT - MAIN TABLE

The Headers which are not created by the Telemarketer for the Principle Entities but directly by the Principle Entity themselves can be allotted through this process. To view the pending Header allotment request send by a Principle Entity:

- 1 Click on the **Header Allotment** tab on the sidebar to view the Pending Header Allotment request sent by Entities
- 2 The Pending request will be visible in the Header allotment table with status as **Pending**.



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Header Allotment

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

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263807486	MANUAL ENTITY1	EKMNP	Other	31/05/2020 , 00:19	31/05/2020 , 00:19	Pending
2	1301158948263807486	MANUAL ENTITY1	TESTMN	Other	31/05/2020 , 00:08	31/05/2020 , 00:08	Active
3	1301158952454042718	MANUAL ENTITY 10	MNLTY	Other	30/05/2020 , 14:21	30/05/2020 , 14:24	Revoked

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## HEADER ALLOTMENT – APPROVAL

- 3 Click on the **Pending Status** and a pop-up will appear with header details along approval /Rejection button.
- 4 To approve the Header Allotment request, press **Approve** button
- 5 Once you click the approve button there will be another pop-up for confirmation of the header allotment.
- 6 Press **Yes** to confirm.
- 7 If the user wants to stop the confirmation then press **Cancel**

The screenshot displays the 'CONNECT Enterprise Solutions' interface. On the left is a sidebar menu with options: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main area shows a 'Header Allotment' section with a search bar and a table of records. A red circle '5' points to the table. A 'Header Details' pop-up is open, showing fields like Reference Number, Header, Header Id, Status (Active), Date of Registration, Category, and Header Allotment Document. A red circle '4' points to the 'Approve' button in this pop-up. In the background, a table shows a record with a 'Pending' status, highlighted by a red circle '3'. At the bottom, an 'Allotment Confirmation' pop-up asks 'Are you sure you want to Approve this Header Allotment?' with 'Cancel' and 'Yes' buttons. Red circles '6' and '7' point to the 'Yes' and 'Cancel' buttons respectively.

## HEADER ALLOTMENT – ACTIVE STATUS

8

Once approved the entry will reflect with **Active Status** in the **Head Allotment Table**.

CONNECT Enterprise Solutions

Welcome, MANUAL TM 10 [Logout](#)

Header Allotment

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

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263807486	MANUAL ENTITY1	BKMNP	Other	31/05/2020 , 00:21	31/05/2020 , 00:21	Active
2	1301158948263807486	MANUAL ENTITY1	BKMNP	Other	31/05/2020 , 00:19	31/05/2020 , 00:20	Rejected
3	1301158948263807486	MANUAL ENTITY1	TESTMN	Other	31/05/2020 , 00:08	31/05/2020 , 00:09	Active
4	1301158952454042718	MANUAL ENTITY 10	MNLTY	Other	30/05/2020 , 14:21	30/05/2020 , 14:21	Revoked

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8

## HEADER ALLOTMENT -REJECTION

**9** In case the Header allotment request needs to be rejected due to any reason, then press **Reject** button

**10** Upon clicking the reject button another **pop-up box** will appear to confirm the action.

**11** Put the valid remarks and press **Yes** button to confirm the rejection. (*Remarks are mandatory*)

**12** If the user wants to cancel the rejection process then press **Cancel** button.

The screenshot displays the 'CONNECT Enterprise Solutions' interface. On the left is a navigation menu with options like Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main area shows a 'Header Allotment' search and a table with columns 'Sl. No.' and 'Entity Id'. A 'Header Details' pop-up window is open, showing fields for Reference Number, Header, Header Id, Status (Active), Date of Registration, and Category. At the bottom of this pop-up are 'Approve' and 'Reject' buttons. A red circle with the number '9' and an arrow points to the 'Reject' button. Below this, an 'Allotment Rejection' pop-up window is shown, asking 'Are you sure you want to Reject this Header Allotment?' and containing a 'Remarks' field. At the bottom of this pop-up are 'Cancel' and 'Yes' buttons. A red box highlights the entire 'Allotment Rejection' pop-up, with a red arrow labeled '10' pointing to it. A red circle with '11' and an arrow points to the 'Yes' button, and a red circle with '12' and an arrow points to the 'Cancel' button.

## HEADER ALLOTMENT – REJECTED STATUS

13

Once rejected the entry will reflect with **Rejected Status** in the **Head Allotment Table**.

The screenshot shows the 'Header Allotment' interface. On the left is a navigation menu with options: Dashboard, Entities, Header, Header Allotment (selected), Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main content area has a search bar and filters for Header Type and Status, both set to 'All', and 'Show Records' set to 25. Below is a table with 8 columns: Sl. No., Entity Id, Entity Name, Header Name, Header Type, Date & Time Of Application, Date & Time Of Status Updated, and Status. The table contains 4 rows. The second row (Sl. No. 2) has a 'Rejected' status, which is highlighted with a red box and a red arrow pointing to a red circle containing the number 13. The other rows have 'Active' or 'Revoked' statuses. At the bottom right, there is a copyright notice: 'Copyright©2019 Connect Enterprise Solutions, Powered by Blookube'.

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263807486	MANUAL_ENTITY1	BKMNP	Other	31/05/2020 , 00:21	31/05/2020 , 00:21	Active
2	1301158948263807486	MANUAL_ENTITY1	BKMNP	Other	31/05/2020 , 00:19	31/05/2020 , 00:20	Rejected
3	1301158948263807486	MANUAL_ENTITY1	TESTMN	Other	31/05/2020 , 00:08	31/05/2020 , 00:08	Active
4	1301158952454042718	MANUAL_ENTITY 10	MNLTY	Other	30/05/2020 , 14:21	30/05/2020 , 14:24	Revoked

## HEADER ALLOTMENT - REVOCATION

The allotted headers by an Entity can be delinked with Revoke button from Header Allotment section of a Telemarketer Panel

**14** Click on the **Active** Status in the Header allotment table.

**15** A **pop-up box** will appear with the Header details along with the option to Revoke.

**16** Press **Revoke** to delink the header allotment process.

**17** Another **pop-up box** will appear to confirm the action.

**18** Press **Yes** to confirm the Allotment revocation process after putting a valid reason/remarks. *(Remarks are mandatory)*

**19** Press **No** to cancel the revocation process.

The screenshot displays the 'Header Allotment' section of the CONNECT Enterprise Solutions interface. A table lists header entries with columns for 'Sl. No.', 'Entity Id', and 'Status'. The 'Status' column shows 'Active' for the selected entry. A 'Header Details' pop-up box is overlaid, showing the following information:

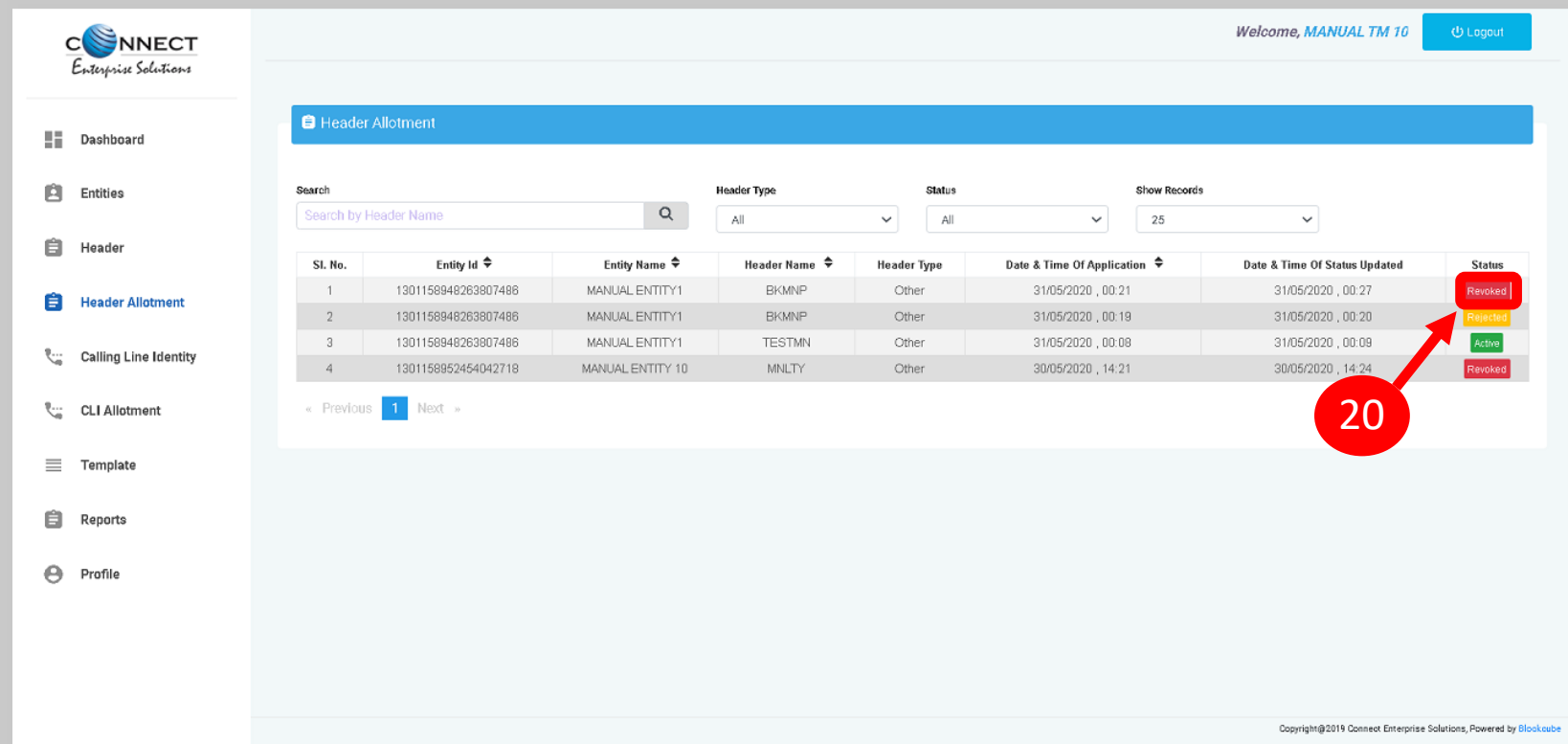
Reference Number	05-IG9KATZNKYX
Header	BKMNP
Header Id	1305159086451120983
Status	Active
Date of Registration	31-05-2020
Category	Banking/Insurance/Financial products/ credit cards
Header Allotment Document	

A 'Revoke' button is visible at the bottom of the 'Header Details' pop-up. Below it, a 'Revoke Confirmation' pop-up box is shown, asking 'Are you sure you want to Revoke this Header?' and providing a 'Remarks' field with a placeholder 'Please Enter Remarks'. 'Cancel' and 'Yes' buttons are at the bottom of this confirmation box.

## HEADER ALLOTMENT – REVOKED STATUS

20

Once revoked the entry will reflect with **Revoked Status** in the Head Allotment Table.



The screenshot shows the 'Header Allotment' interface. On the left is a navigation menu with options: Dashboard, Entities, Header, Header Allotment (selected), Calling Line Identity, CLI Allotment, Template, Reports, and Profile. The main area displays a table with the following data:

Sl. No.	Entity Id	Entity Name	Header Name	Header Type	Date & Time Of Application	Date & Time Of Status Updated	Status
1	1301158948263807486	MANUAL ENTITY1	BKMNP	Other	31/05/2020 , 00:21	31/05/2020 , 00:27	Revoked
2	1301158948263807486	MANUAL ENTITY1	BKMNP	Other	31/05/2020 , 00:19	31/05/2020 , 00:20	Revoked
3	1301158948263807486	MANUAL ENTITY1	TESTMN	Other	31/05/2020 , 00:08	31/05/2020 , 00:09	Active
4	1301158952454042718	MANUAL ENTITY 10	MNLTY	Other	30/05/2020 , 14:21	30/05/2020 , 14:24	Revoked

A red circle with the number '20' and an arrow points to the 'Revoked' status of the first row. The interface also includes search filters for Header Name, Header Type, Status, and Show Records (set to 25).

20

# TEMPLATE



## TEMPLATE CREATION – TEMPLATE TABLE

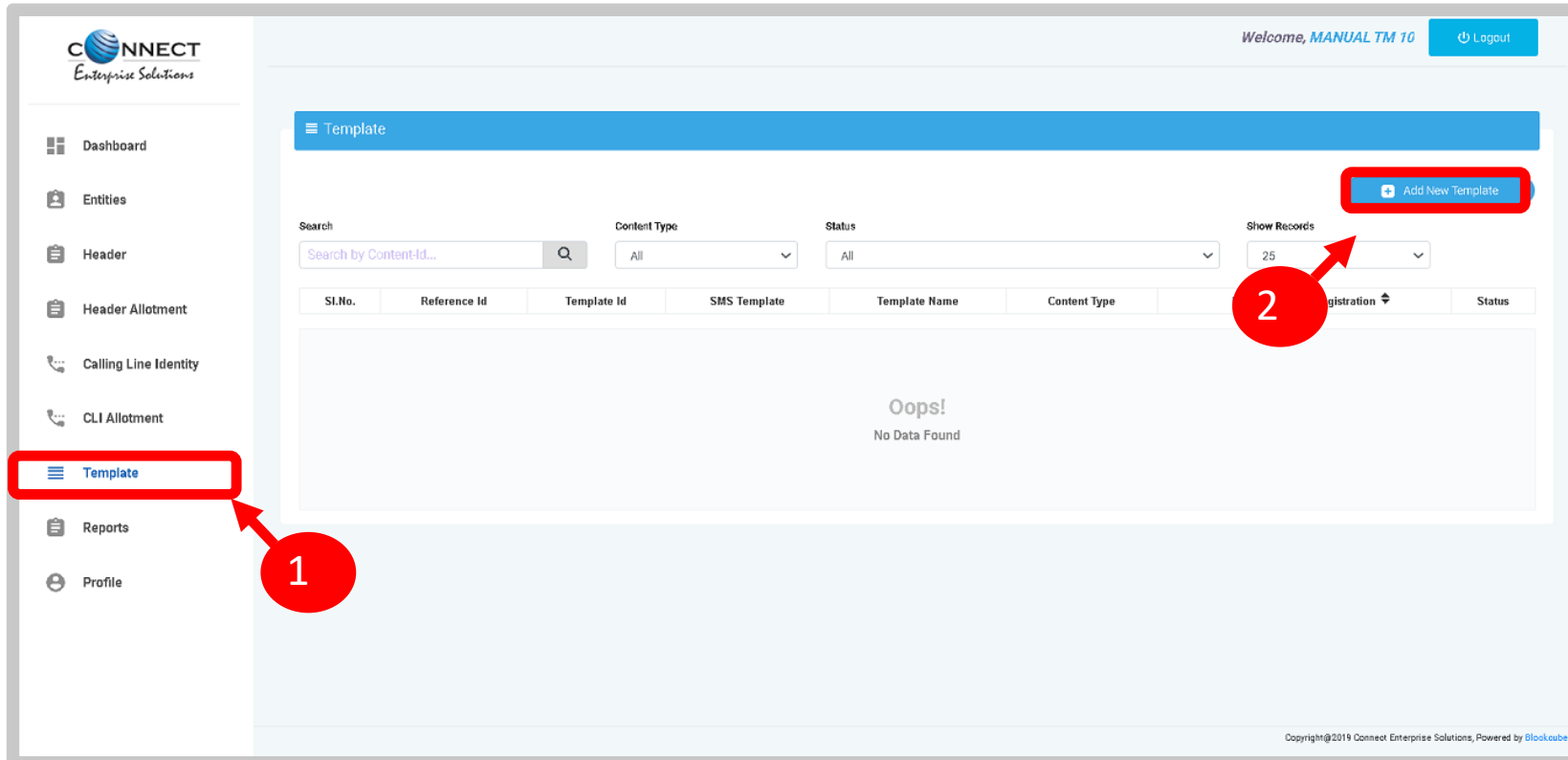
Templates are created for Commercial Communication and as per TRAI guidelines all the Principle Entities needs to register their Templates before sending Commercial Communication.

1

In the Telemarketer portal on the side bar click on the **Templates** option to view the Template page.

2

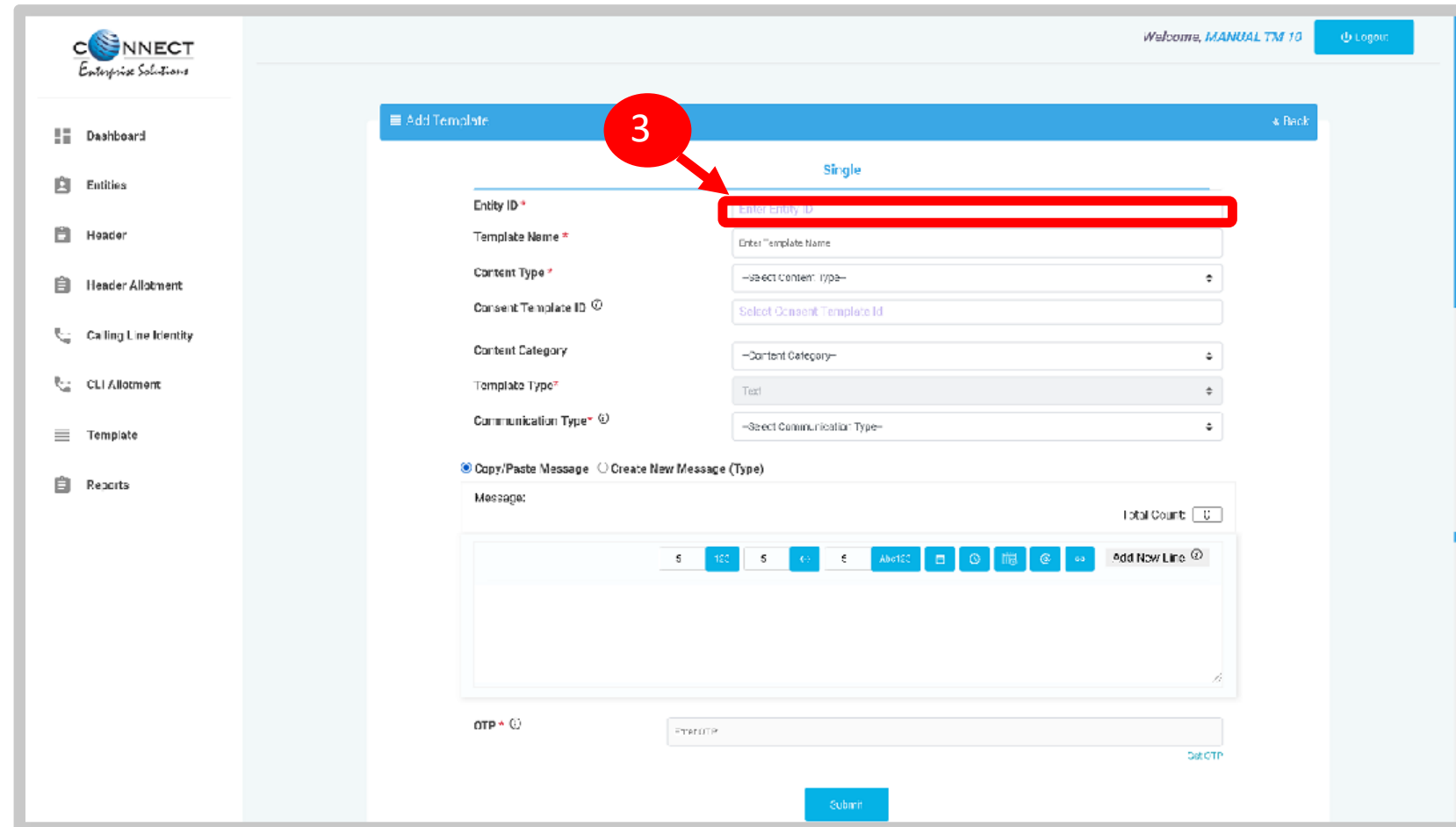
In the Template page user can click on **Add New Template** button to create new Templates.



The screenshot displays the 'Template' management page in the Telemarketer portal. On the left sidebar, the 'Template' option is highlighted with a red box and a red circle containing the number '1'. The main content area features a search bar with the placeholder 'Search by Content-Id...', a 'Content Type' dropdown menu set to 'All', and a 'Status' dropdown menu set to 'All'. To the right, there is a 'Show Records' dropdown menu set to '25'. A red box and a red circle containing the number '2' highlight the 'Add New Template' button in the top right corner. Below the filters, a table is visible with columns: SI.No., Reference Id, Template Id, SMS Template, Template Name, Content Type, registration, and Status. The table currently displays 'Oops! No Data Found'.

# TEMPLATE CREATION – ENTITY SELECTION

3 Select /type the **Entity ID** of the Principle Entity for whom the Template to be created. The Name of the Entity will be displayed along with the Entity ID.



# TEMPLATE CREATION – TEMPLATE NAME

4

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

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**Add Template** [Back](#)

Single

Entity ID \*

Template Name \*

Content Type \*

Consent Template ID

Content Category

Template Type \*

Communication Type \*

Copy/Paste Message  Create New Message (Type)

Message: Total Count:

OTP \*

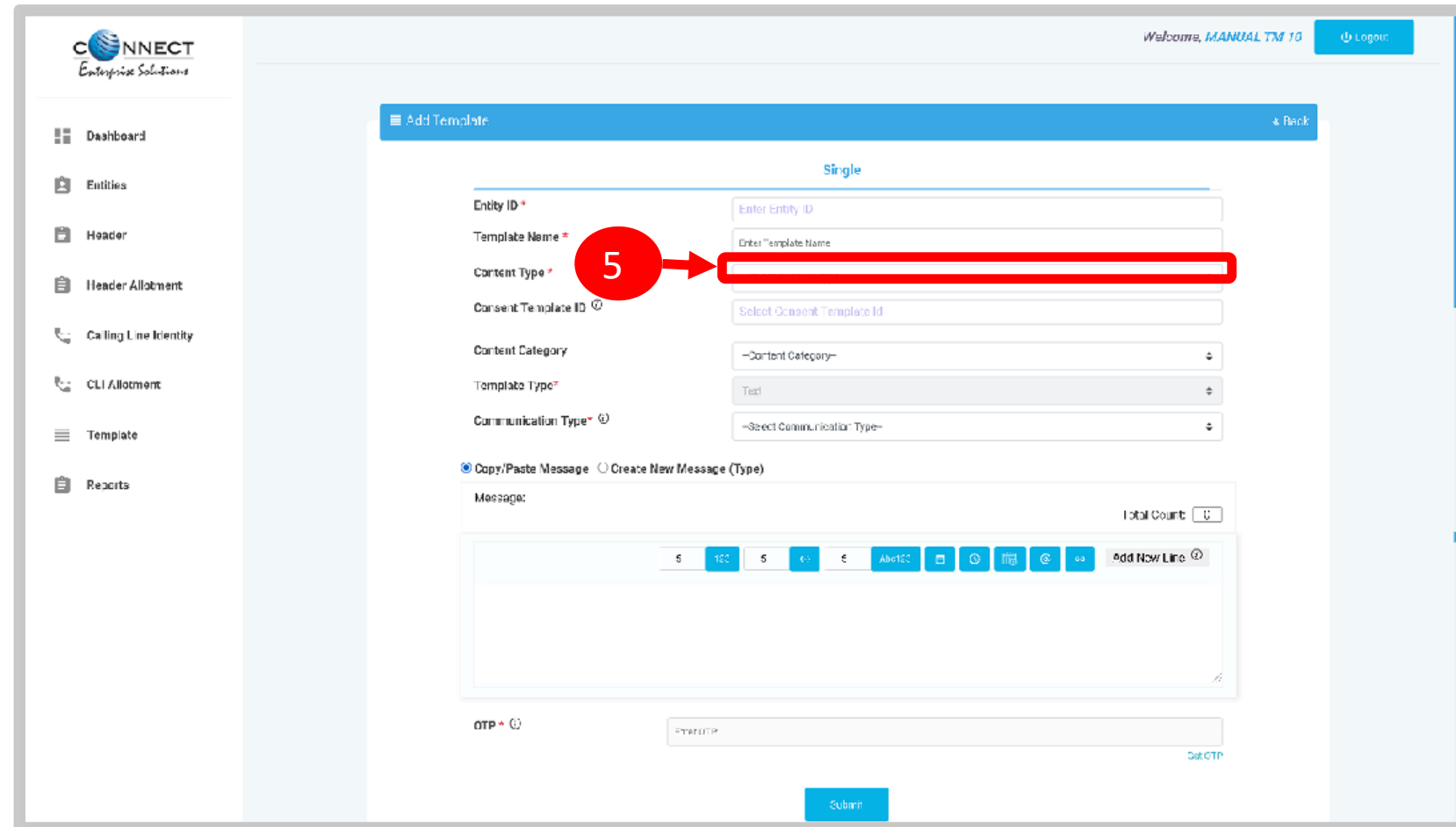
OR CTP

# TEMPLATE CREATION – CONTENT TYPE

5

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

- Transactional
- Promotional
- Service Explicit
- Service Implicit



The screenshot shows the 'Add Template' form in the CONNECT Enterprise Solutions application. The form is titled 'Add Template' and has a 'Back' button. The form is for a 'Single' template. The fields are:

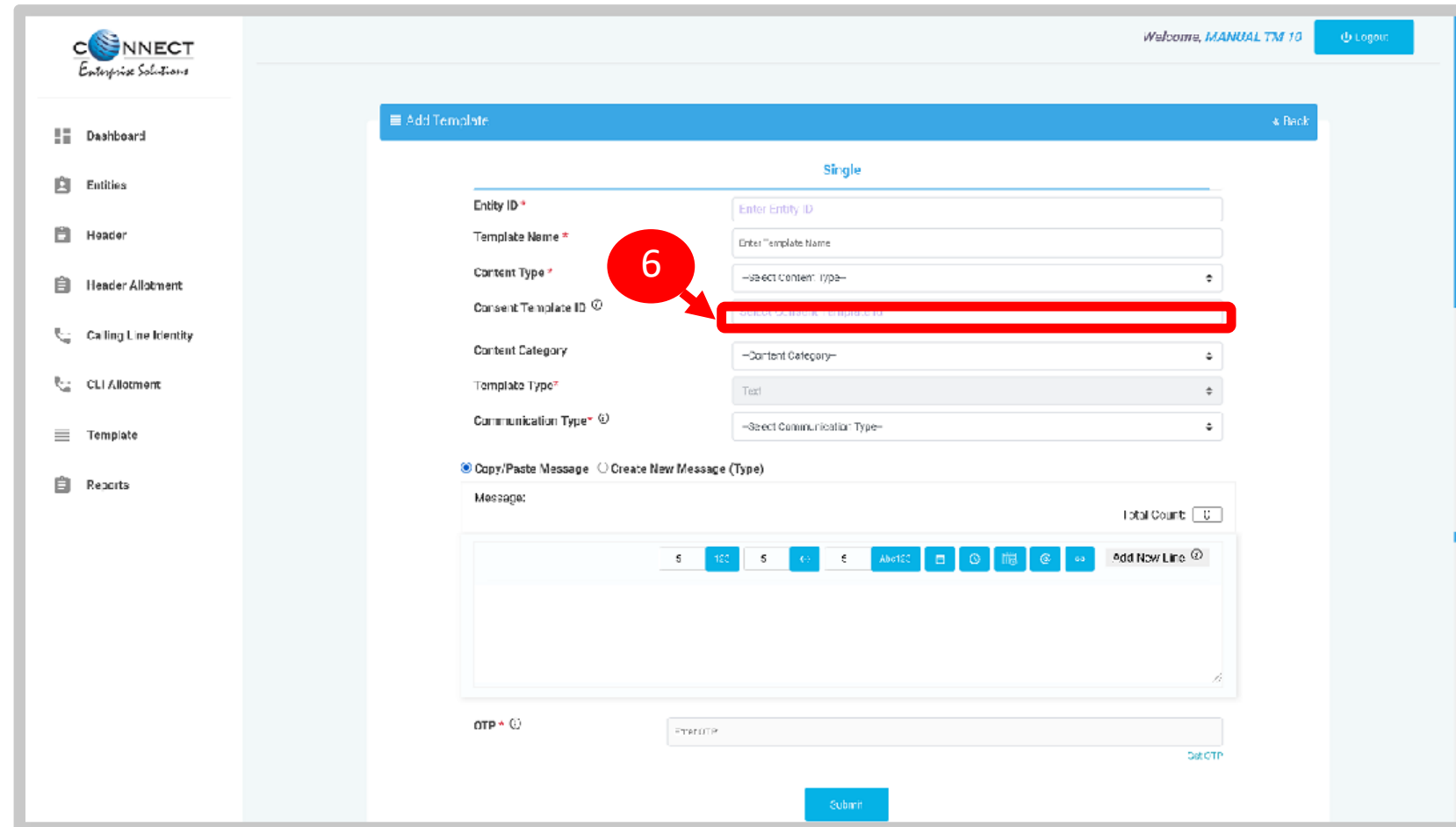
- Entity ID \* (Text input: Enter Entity ID)
- Template Name \* (Text input: Enter Template Name)
- Content Type \* (Dropdown menu, highlighted with a red circle and the number 5, and an arrow pointing to the dropdown list)
- Consent Template ID (Dropdown menu: Select Consent Template Id)
- Content Category (Dropdown menu: -Content Category-)
- Template Type\* (Dropdown menu: Text)
- Communication Type\* (Dropdown menu: -Select Communication Type-)

Below the fields, there are radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)'. There is a 'Message:' label and a 'Total Count:' label. The message input area has a toolbar with icons for undo, redo, bold, italic, underline, link, unlink, and add new line. At the bottom, there is an 'OTP \*' label and a text input field for the OTP value, and a 'Submit' button.

## TEMPLATE CREATION – CONSENT TEMPLATE

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


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

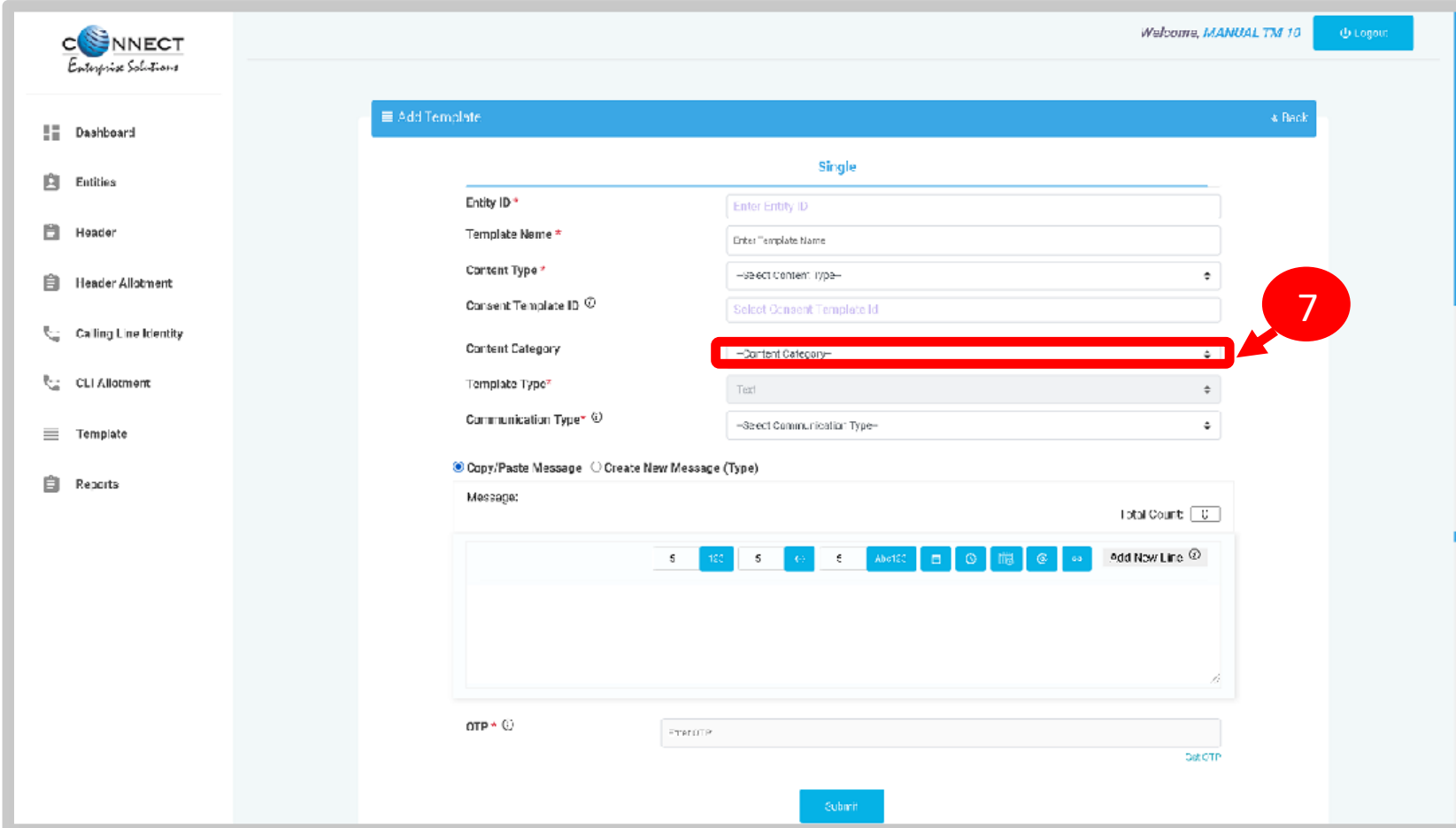


The screenshot shows the 'Add Template' form in the CONNECT Enterprise Solutions interface. The form is titled 'Single' and contains several fields: Entity ID, Template Name, Content Type, Consent Template ID, Content Category, Template Type, and Communication Type. A red circle with the number '6' highlights the 'Consent Template ID' dropdown menu, which is currently open and showing a list of options. Below the form, there are radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)', a 'Message' text area with a toolbar, and an 'OTP' field. A 'Submit' button is at the bottom.

## TEMPLATE CREATION – CONTENT CATEGORY

**7** In the **Content Category** column select any of the Category from the dropdown list as per the business requirement of the Entity.

 *Content Category is only mandatory in case of Promotional messages.*



The screenshot shows the 'Add Template' form in the CONNECT Enterprise Solutions application. The form is titled 'Single' and contains several input fields: Entity ID, Template Name, Content Type, Consent Template ID, Content Category, Template Type, and Communication Type. The 'Content Category' dropdown menu is highlighted with a red box and a red arrow pointing to it from a red circle containing the number '7'. Below the form, there are radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)', a 'Message' text area with a toolbar, and an 'OTP' field. A 'Submit' button is at the bottom.

## TEMPLATE CREATION – TEMPLATE & COMMUNICATION TYPE

8

In the **Template Type** column it will be:

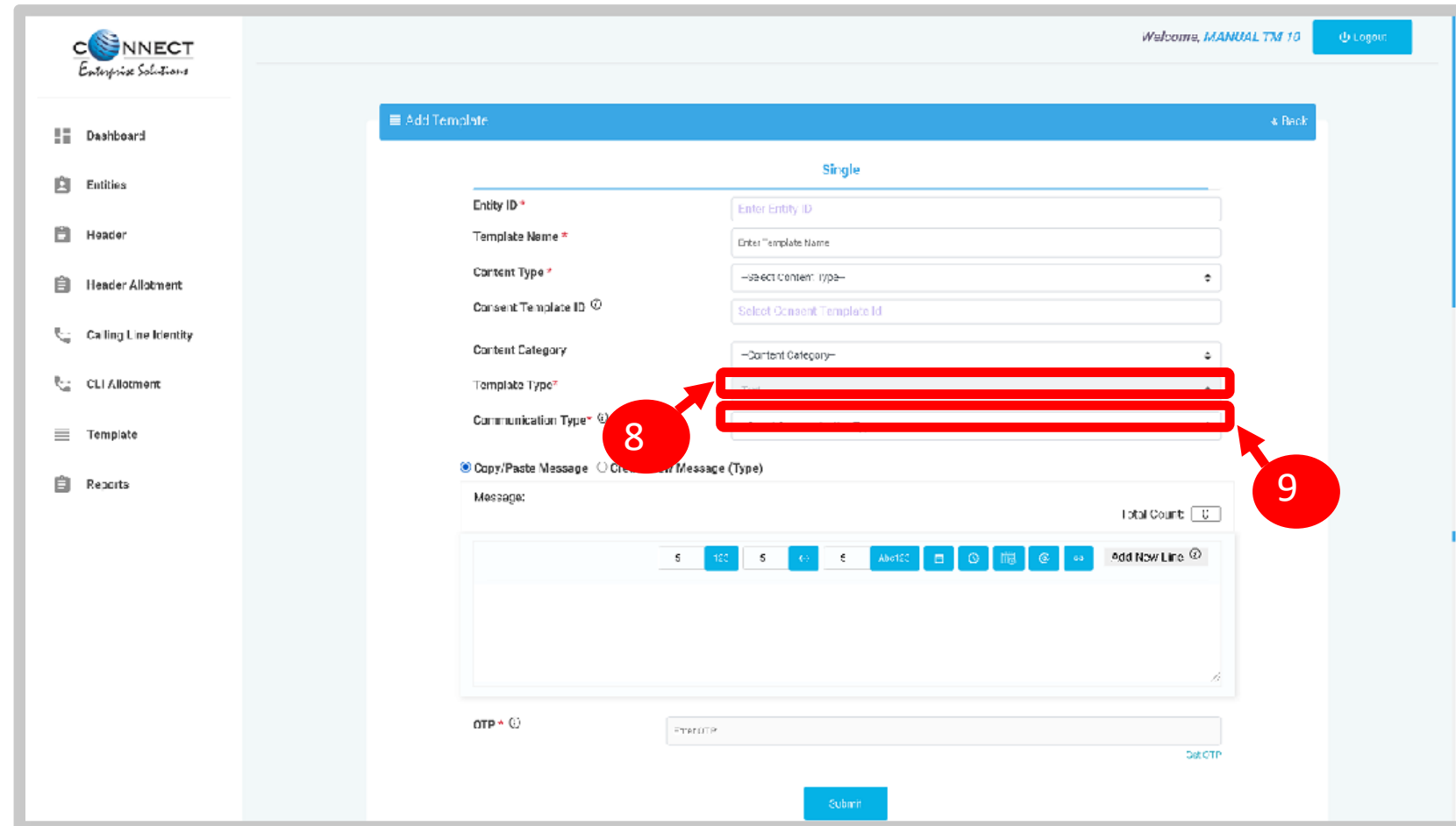
- Text
- Unicode

*(user need not select the option it will be auto selected basis on the content user is creating.)*

9

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

- Call
- SMS



## TEMPLATE CREATION – CONTENT CREATION (COPY/PASTE)

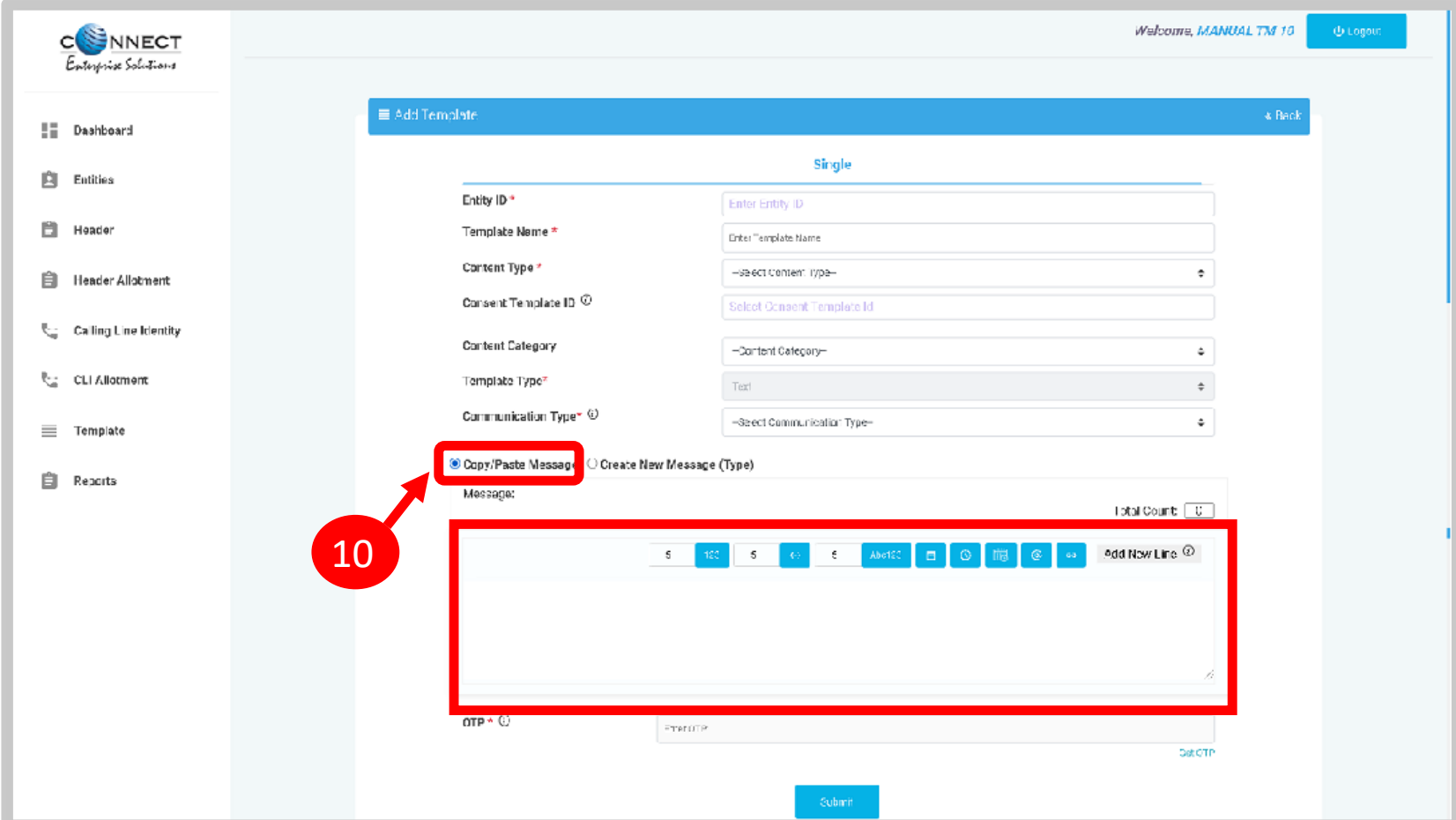
In the Content creation section there are two options available:

- 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.



The screenshot shows the 'Add Template' interface in the CONNECT Enterprise Solutions system. The 'Copy/Paste Message' option is selected, and the rich text editor below it is highlighted with a red box. A red circle with the number '10' and an arrow points to the selected radio button. The form includes the following fields:

- Entity ID \*
- Template Name \*
- Content Type \*
- Consent Template ID ⓘ
- Content Category
- Template Type\*
- Communication Type\* ⓘ

At the bottom of the form, there is a 'Submit' button.

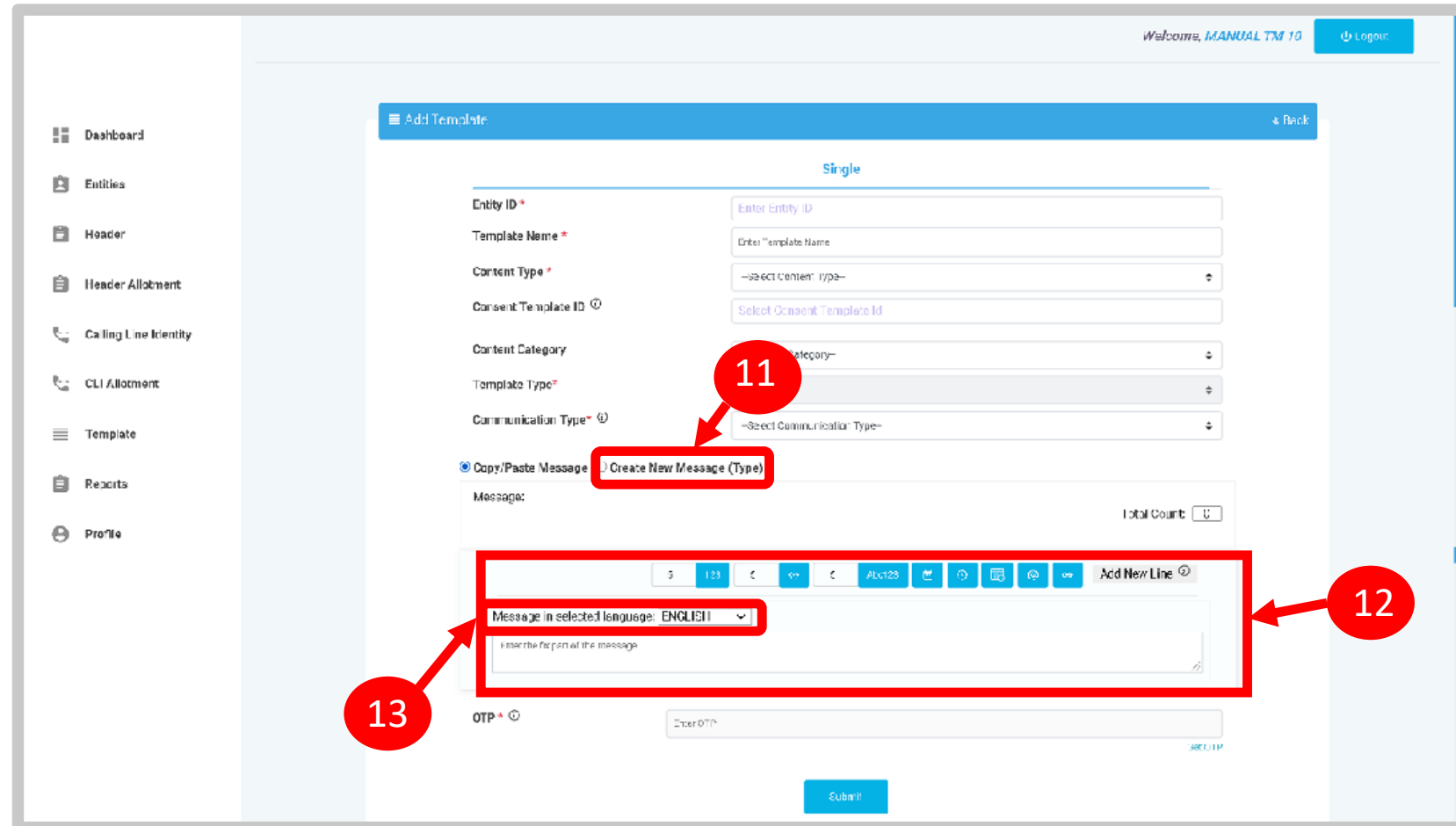


## TEMPLATE CREATION - CONTENT CREATION (TYPE MESSAGE)

**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..

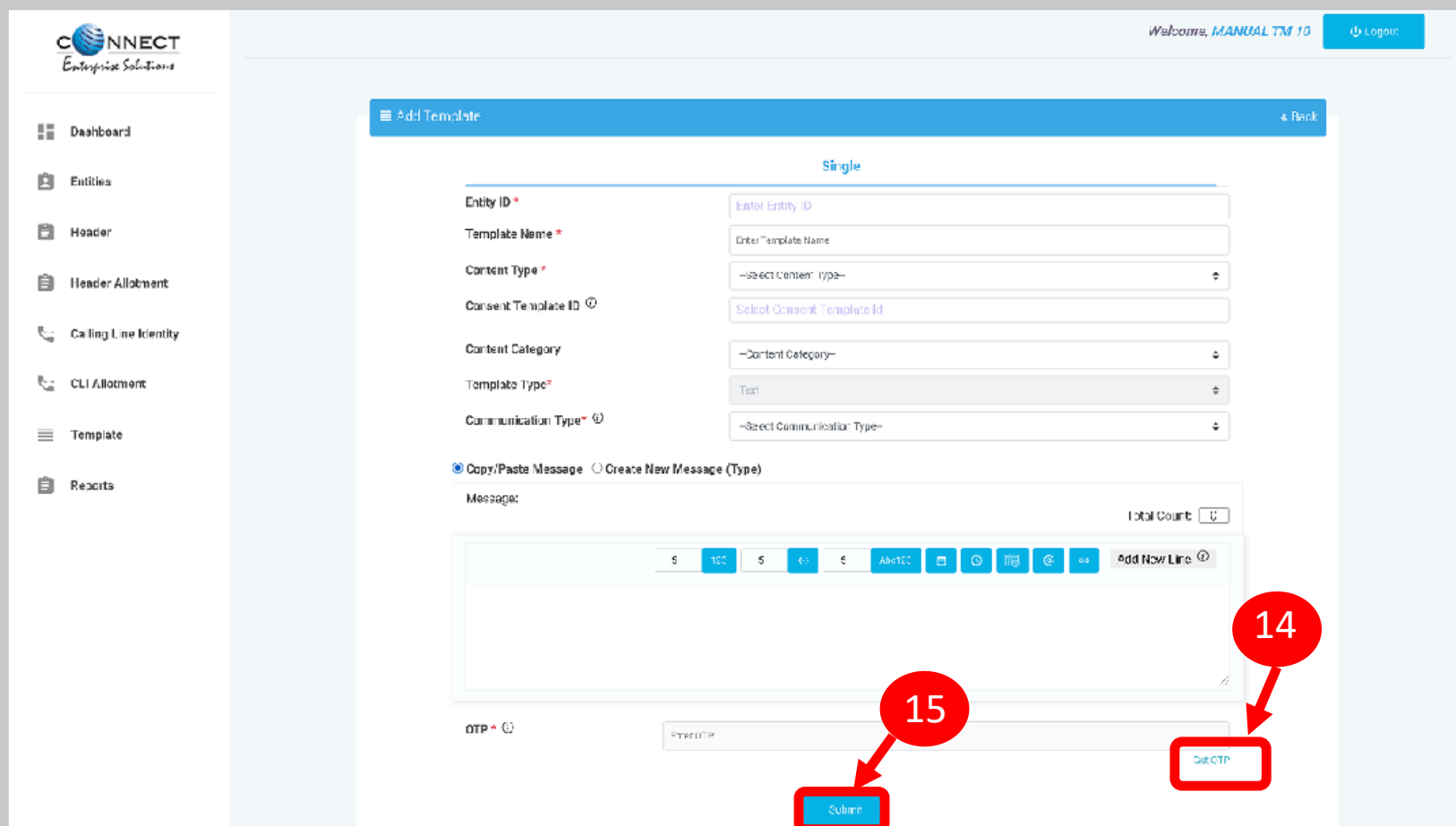
**13** Messages in languages other than English can be created, such templates type will be treated as Unicode. Language can be selected from the dropdown list.



## TEMPLATE CREATION - REQUEST SUBMISSION

**14** Press the **Get OTP** link to get a One Time Password on your registered Mobile and email id, type the OTP in the OTP column to authenticate the template creation process.

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



The screenshot shows the 'Add Template' form in the CONNECT system. The form is titled 'Single' and includes the following fields:

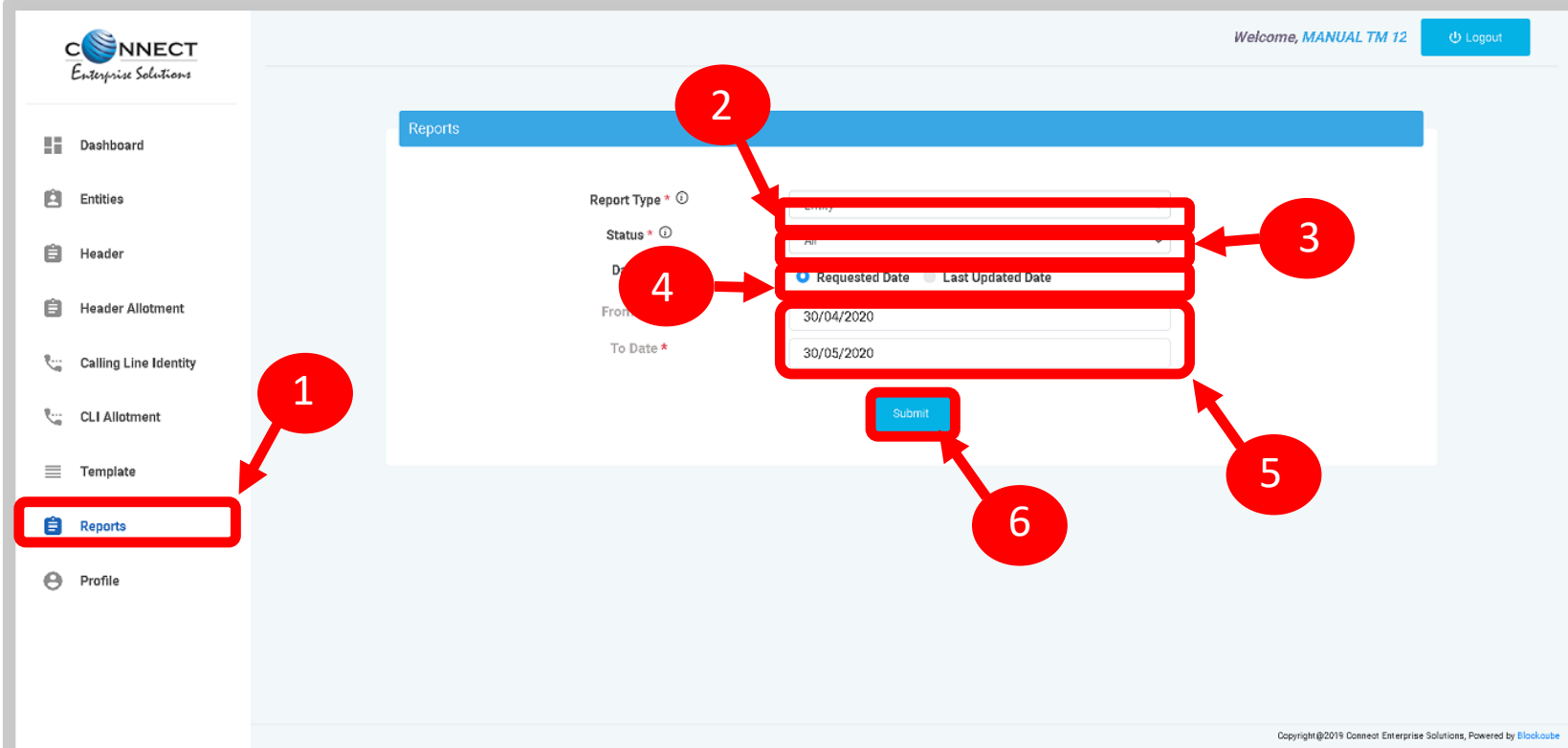
- Entity ID \*
- Template Name \*
- Content Type \*
- Consent Template ID \*
- Content Category
- Template Type \*
- Communication Type \*

Below the fields, there are radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)'. A 'Message' text area is provided with a rich text editor toolbar. At the bottom of the form, there is an 'OTP' field and a 'Submit' button. A 'Get OTP' link is also visible. Red callouts with numbers 14 and 15 point to the 'Get OTP' link and the 'Submit' button respectively.

# REPORTS

## TELEMARKETER 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.



The screenshot shows the 'Reports' page in the CONNECT Enterprise Solutions application. The sidebar on the left contains a menu with items: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, Reports (highlighted with a red box and arrow 1), and Profile. The main content area has a 'Reports' header (arrow 2) and a form with the following fields: 'Report Type \*' (arrow 2), 'Status \*' (arrow 3), 'Requested Date' (radio button, arrow 4), 'Last Updated Date' (radio button), 'From' (date field, arrow 5) with value '30/04/2020', and 'To Date \*' (date field, arrow 5) with value '30/05/2020'. A 'Submit' button (arrow 6) is located below the form. The top right of the page shows 'Welcome, MANUAL TM 12' and a 'Logout' button. A copyright notice 'Copyright ©2019 Connect Enterprise Solutions, Powered by BlokLube' is at the bottom right.

# PROFILE

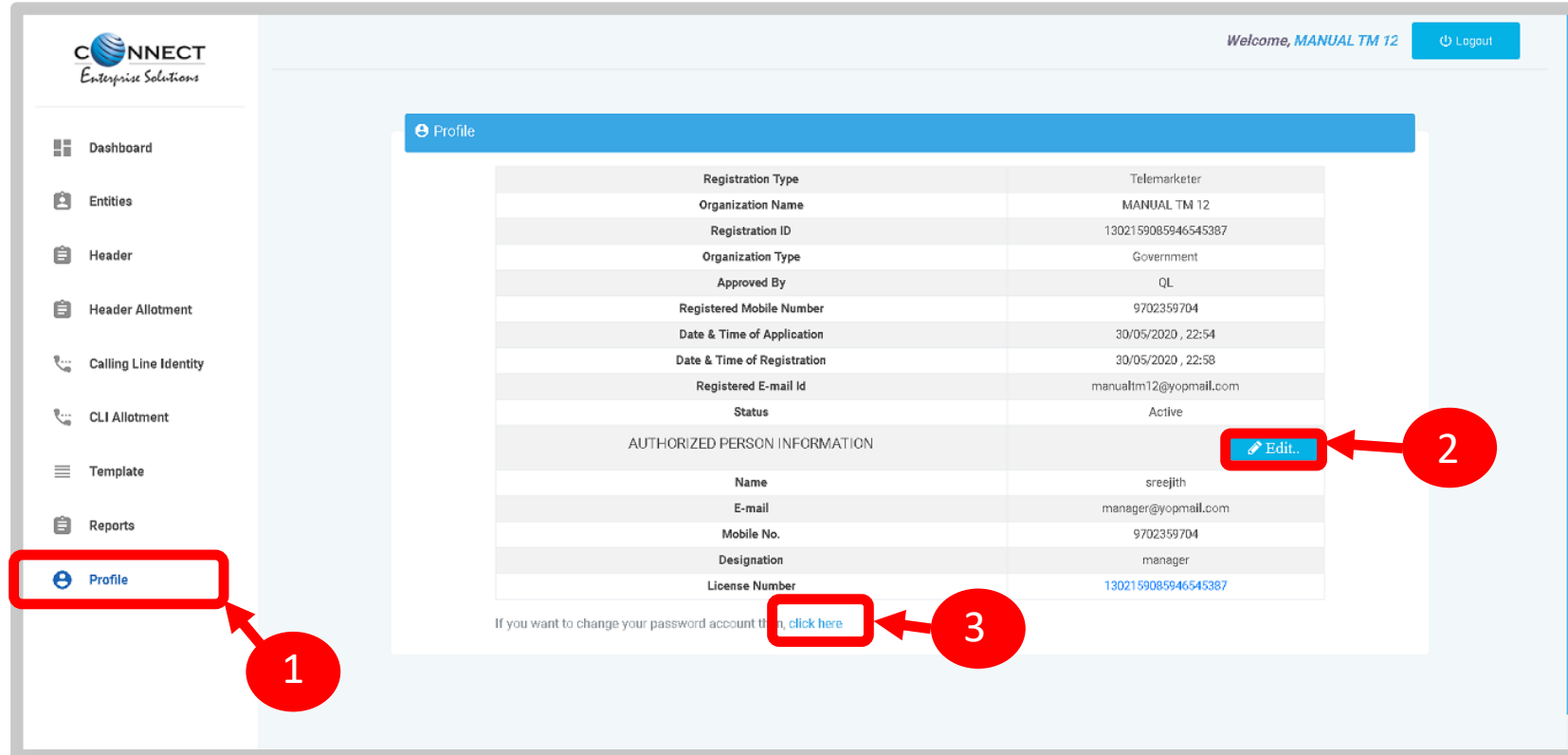
## PROFILE PAGE

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 user interface for the Profile page. The sidebar on the left contains the following menu items: Dashboard, Entities, Header, Header Allotment, Calling Line Identity, CLI Allotment, Template, and Reports. The 'Profile' link is highlighted with a red box and labeled '1'. The main content area displays a table with the following data:

Registration Type	Telemarketer
Organization Name	MANUAL TM 12
Registration ID	1302159085946545387
Organization Type	Government
Approved By	QL
Registered Mobile Number	9702359704
Date & Time of Application	30/05/2020 , 22:54
Date & Time of Registration	30/05/2020 , 22:58
Registered E-mail Id	manualtm12@yopmail.com
Status	Active
AUTHORIZED PERSON INFORMATION	
Name	sreejith
E-mail	manager@yopmail.com
Mobile No.	9702359704
Designation	manager
License Number	1302159085946545387

An 'Edit...' button is highlighted with a red box and labeled '2'. Below the table, there is a link 'click here' highlighted with a red box and labeled '3'. The top right of the page shows 'Welcome, MANUAL TM 12' and a 'Logout' button.

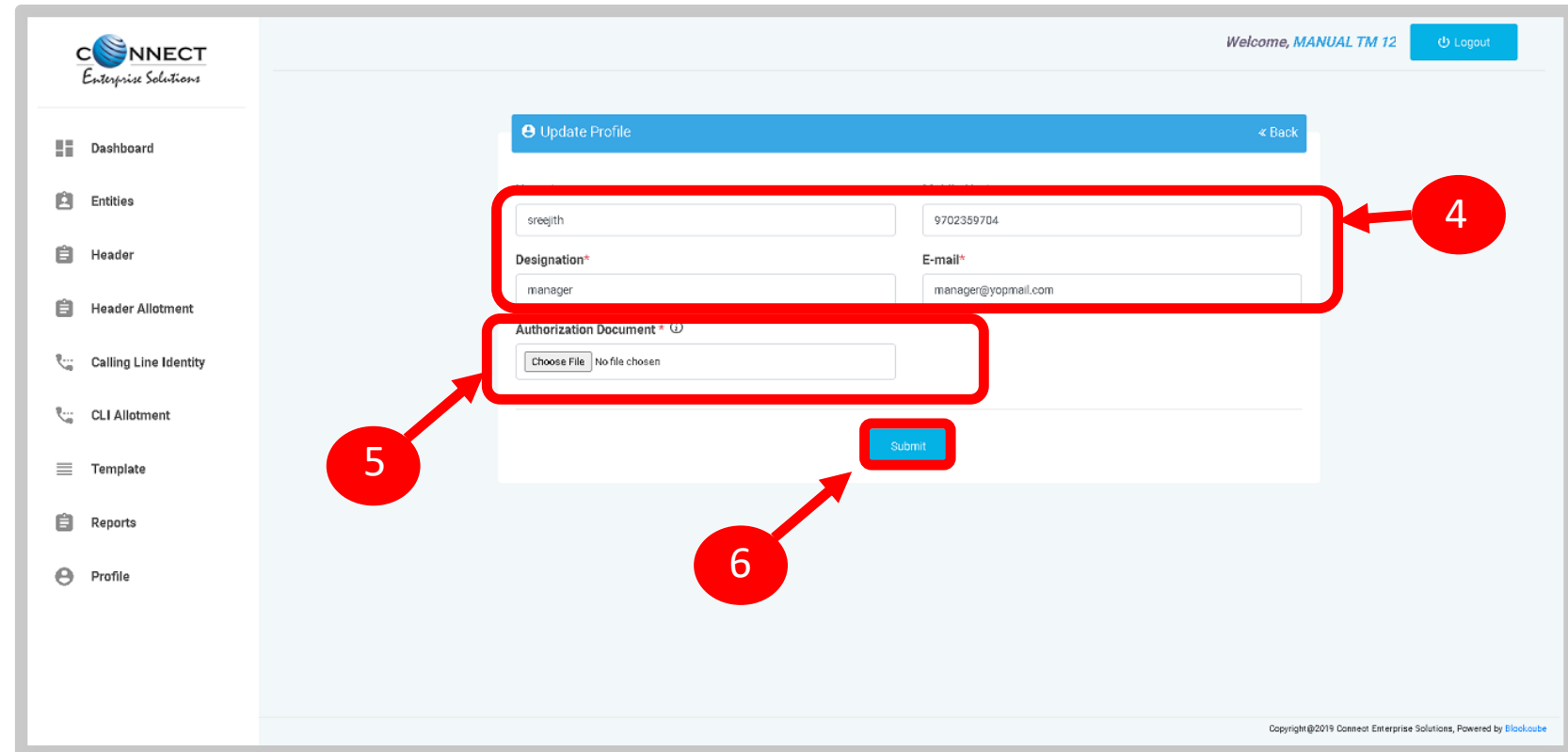
## PROFILE UPDATE PAGE

**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.



- Dashboard
- Entities
- Header
- Header Allotment
- Calling Line Identity
- CLI Allotment
- Template
- Reports
- Profile

The screenshot shows the 'Reset Your Password' page. At the top right, it says 'Welcome, MANUAL TM 12' and has a 'Logout' button. The main form has a blue header with a gear icon, 'Reset Your Password', and a '< Back' link. Below the header are three input fields: 'Current Password \*' with the placeholder 'Enter current password', 'New Password \*' with the placeholder 'Enter Password', and 'Confirm Password \*' with the placeholder 'Confirm Password'. A blue 'Submit' button is located below the input fields. Red callouts are present: a red circle with the number '7' points to the 'Current Password' field; a red circle with the number '8' points to the 'New Password' and 'Confirm Password' fields; and a red circle with the number '9' points to the 'Submit' button. The footer of the page contains the text '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 !