

Welcome to Smart Enterprise Solutions

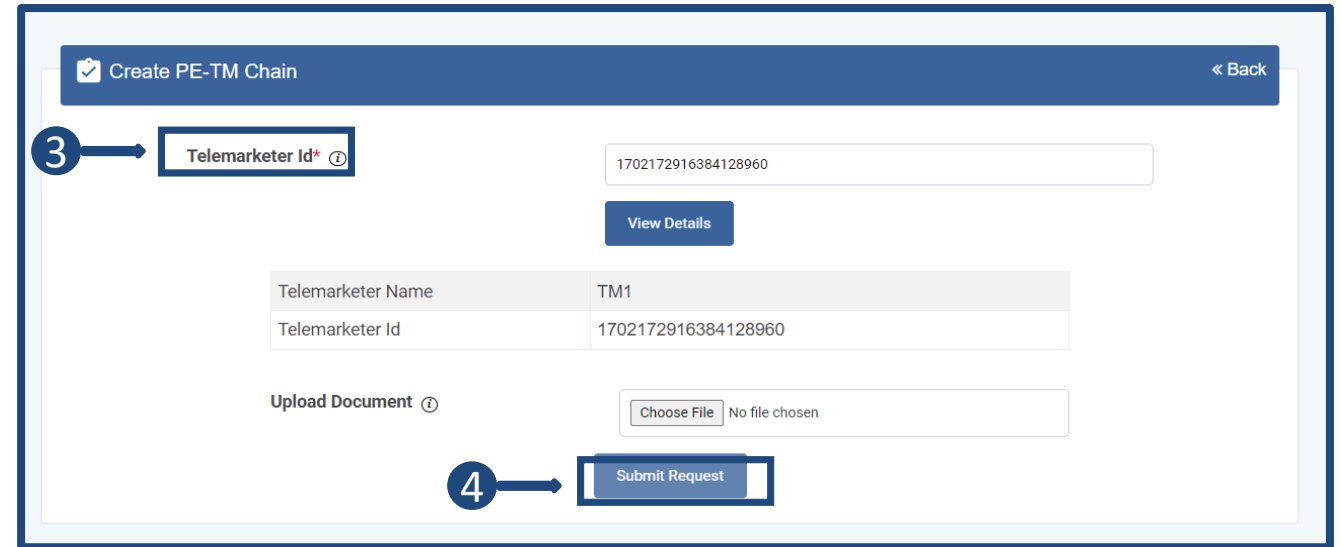
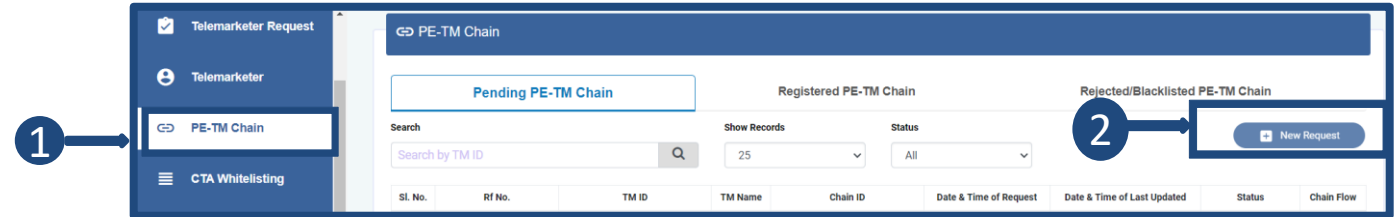
USER MANUAL

PE-TM Binding

PE-TM Binding

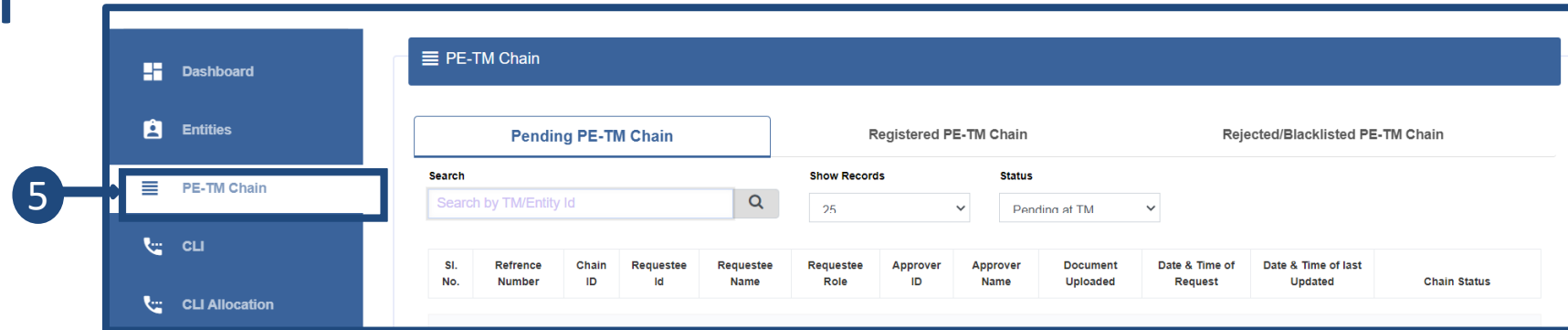
Request Initiated by PE.

- 1 On the Entity panel in the side menu bar, there will be a “PE-TM Chain” option.
- 2 The option of initiating a new request will be there.
- 3 The Entity has to enter the respective Telemarketer ID. Then click on view details, and the name of the TM will appear. Upload the document if required.
- 4 Click on “Submit Button”.
The request will be submitted to TM for acceptance & defining its role as TM aggregator or TM Delivery.

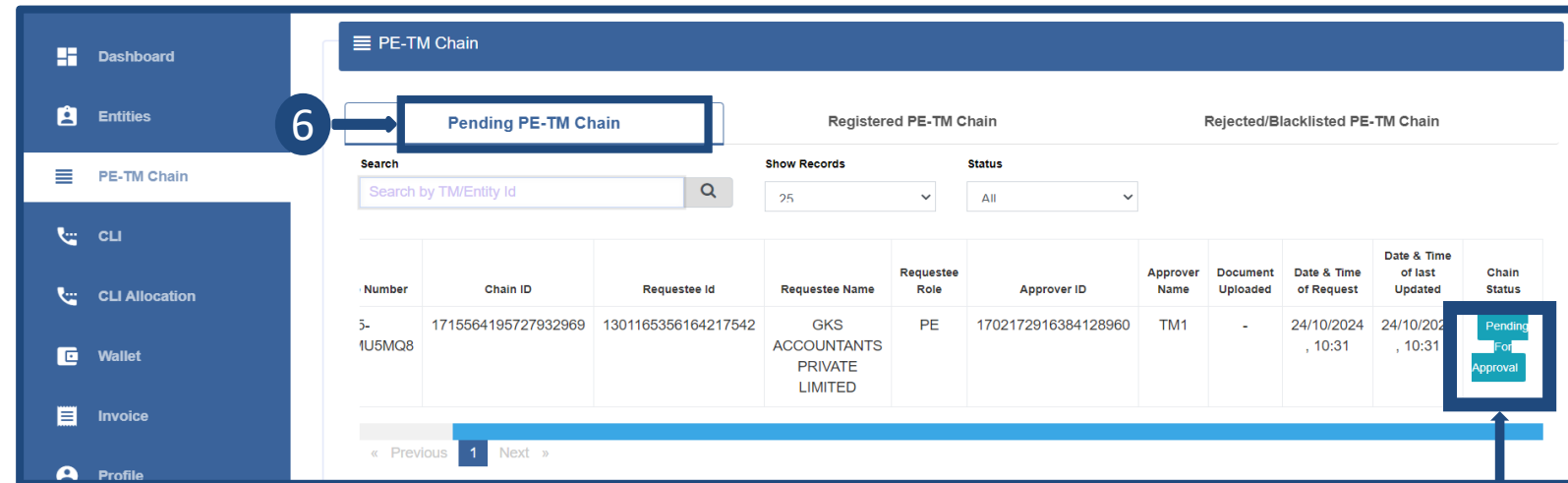


Pending request at TM

5 The request will be submitted to the TM Panel. On the TM Panel in the side menu bar, there will be a “PE-TM Chain” option.



6 On the PE panel When the entity sends the binding request to TM, it will be visible under the pending PE-TM chain section with the status "Pending for Approval".



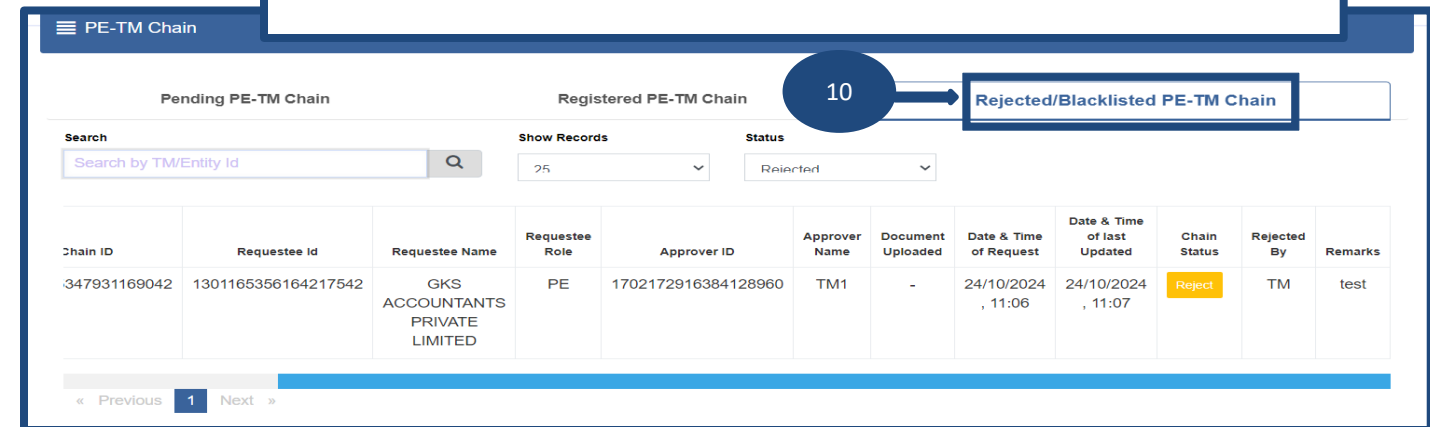
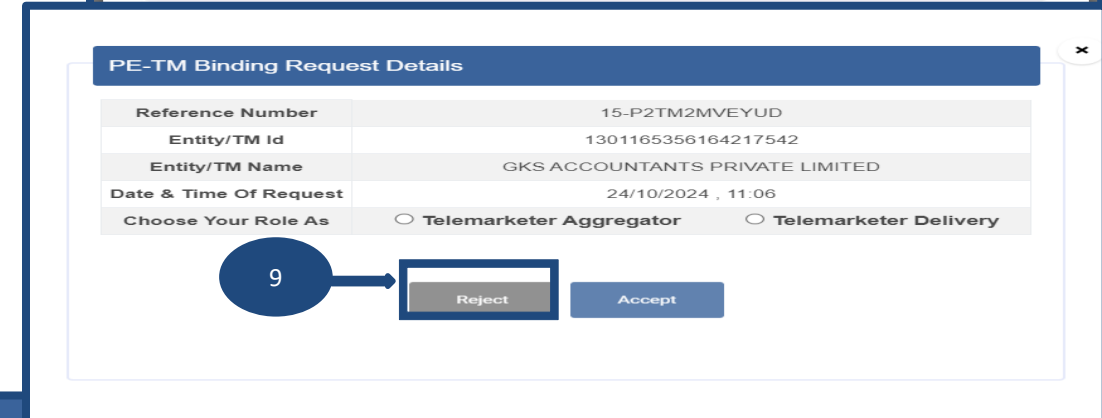
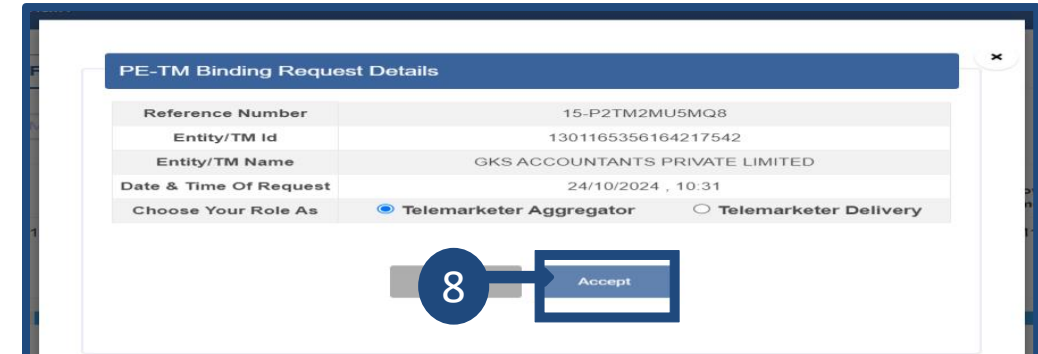
7 On the TM panel Click on Pending for approval.

Pending at TM

8 TM has to select his role (TM-A/TM-D) and click on the Accept button.

9 If TM rejected the request by clicking on the Reject button.

10 The rejected request will go under Rejected/Blacklisted PE-TM Chain section with chain status as "Rejected".



Pending at TM

11 While accepting. If TM will select its Role as TM aggregator. Then TM has to enter the next Telemarketer ID. Then click on the view details button. The details of TM will appear.

12 Click on the Submit Button.

13 The chain status will change to “Pending at next TM”. Further Next TM has to follow the same process.

Request Approved and sent to next TM for further approval

Welcome, TM1 Logout

PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain

Search Show Records Status

Search by TM/Entity Id 25 All

Request Number	Chain ID	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chain Status
15-2MU5MQ8	1715564195727932969	1301165356164217542	GKS ACCOUNTANTS PRIVATE LIMITED	PE	1702172916384128960	TM1	-	24/10/2024	24/10/2024	Pending At Next TM

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Status View at Entity Panel

14 Submitted Request will be visible under the Pending PE-TM Chain section with the status "Pending at TM".

15 If the role of the requested TM is TM-A. Post approval the status will change to "chain in-process" Till the TM-D gets declared in the chain. After TM-D declared the status changes to "pending final approval" at the Entity's end.

The screenshot shows the 'PE-TM Chain' interface. On the left is a navigation menu with items: Telemarketer, PE-TM Chain, CTA Whitelisting, URL Shortener, and Header. The main content area has a header 'PE-TM Chain' and three tabs: 'Pending PE-TM Chain', 'Registered PE-TM Chain', and 'Rejected/Blacklisted PE-TM Chain'. The 'Pending PE-TM Chain' tab is active. Below the tabs are search and filter options: 'Search by TM ID', 'Show Records' (set to 25), and 'Status' (set to All). A table displays one record with the following data:

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-P2TM2MV5CKI	1702172916485455948	TM2	1715580860223058042	24/10/2024 , 10:59	24/10/2024 , 10:59	Pending at TM	

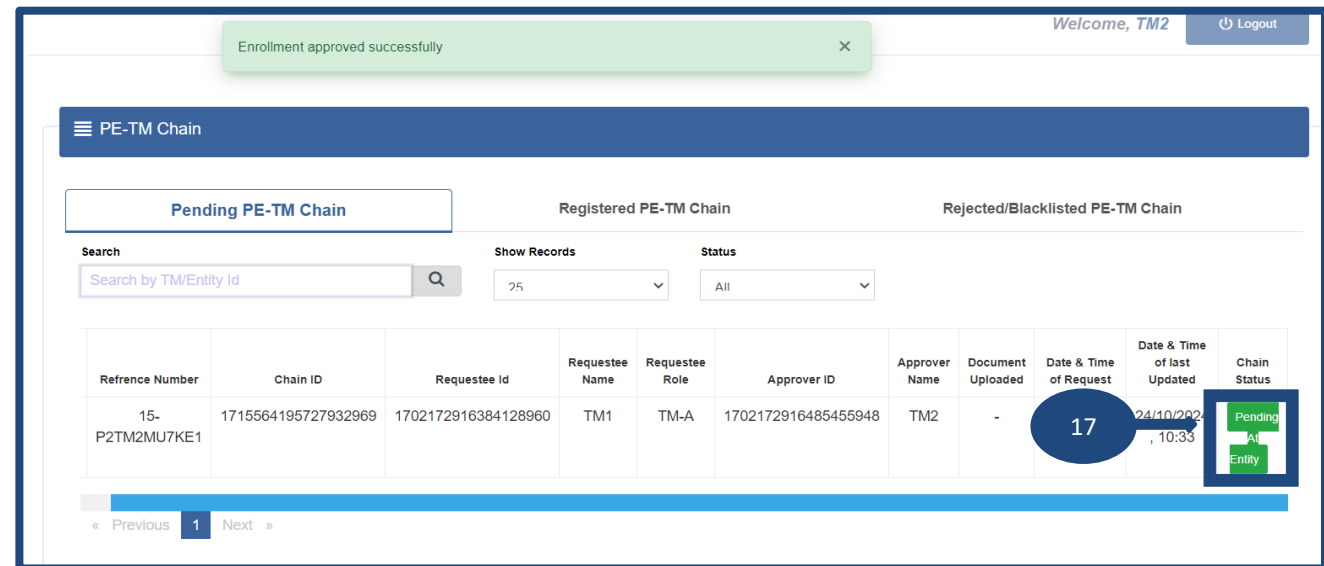
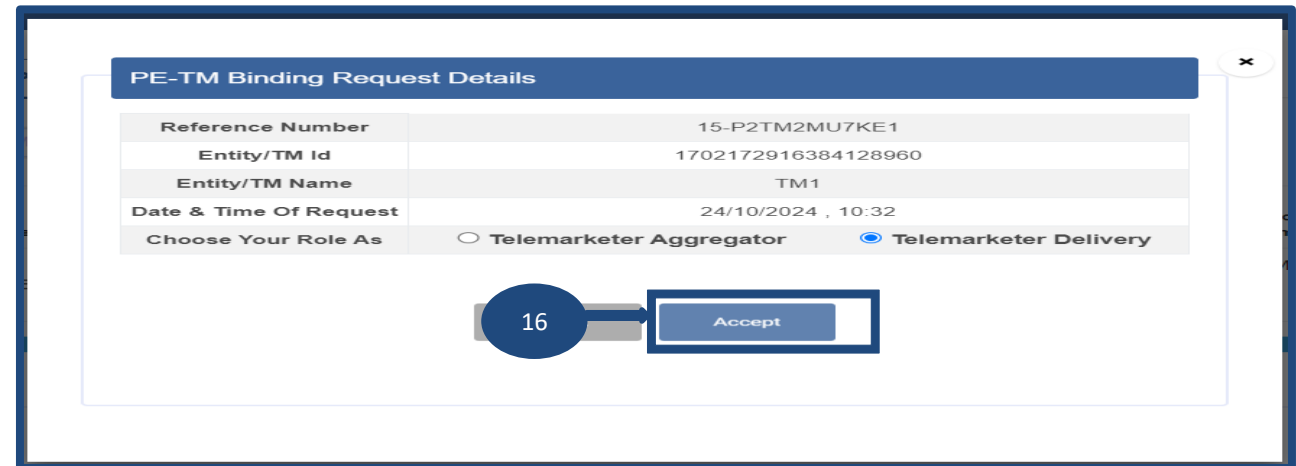
At the bottom of the table, there are navigation links: '< Previous 1 Next >'. A callout box labeled '14' points to the 'Pending PE-TM Chain' header.

This screenshot shows the same 'PE-TM Chain' interface, but the status of the record in the table has changed to 'Chain In-process'. A callout box labeled '15' points to this status. The rest of the interface, including the navigation menu and search filters, remains the same.

Note: In the chain, two TM-A and only one TM-D are allowed.

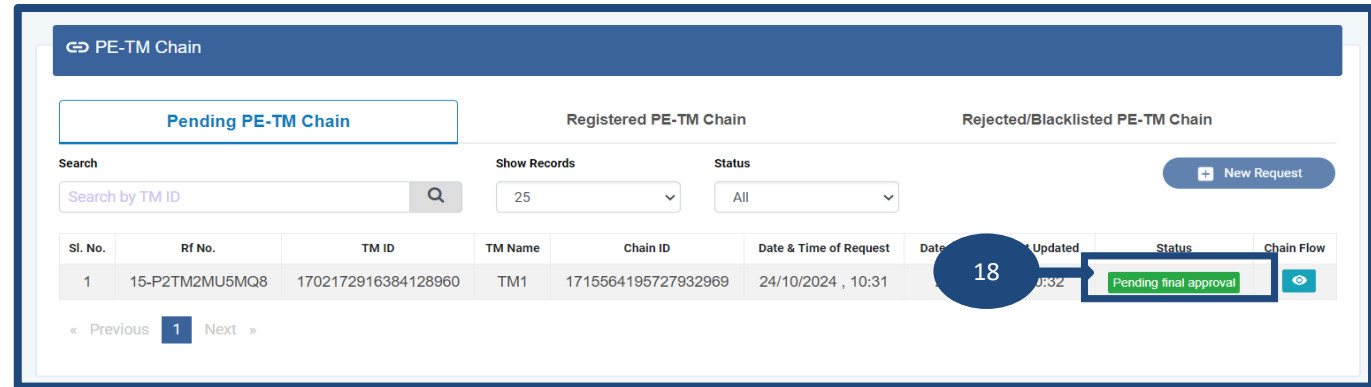
Request approve by TM

- 16 If the TM selects its role as TM delivery (TM-D). The chain will be completed here.
- 17 The status will change to “Pending at Entity” in the PE TM Chain Section.
The Request will go to the entity for final Approval of the chain.

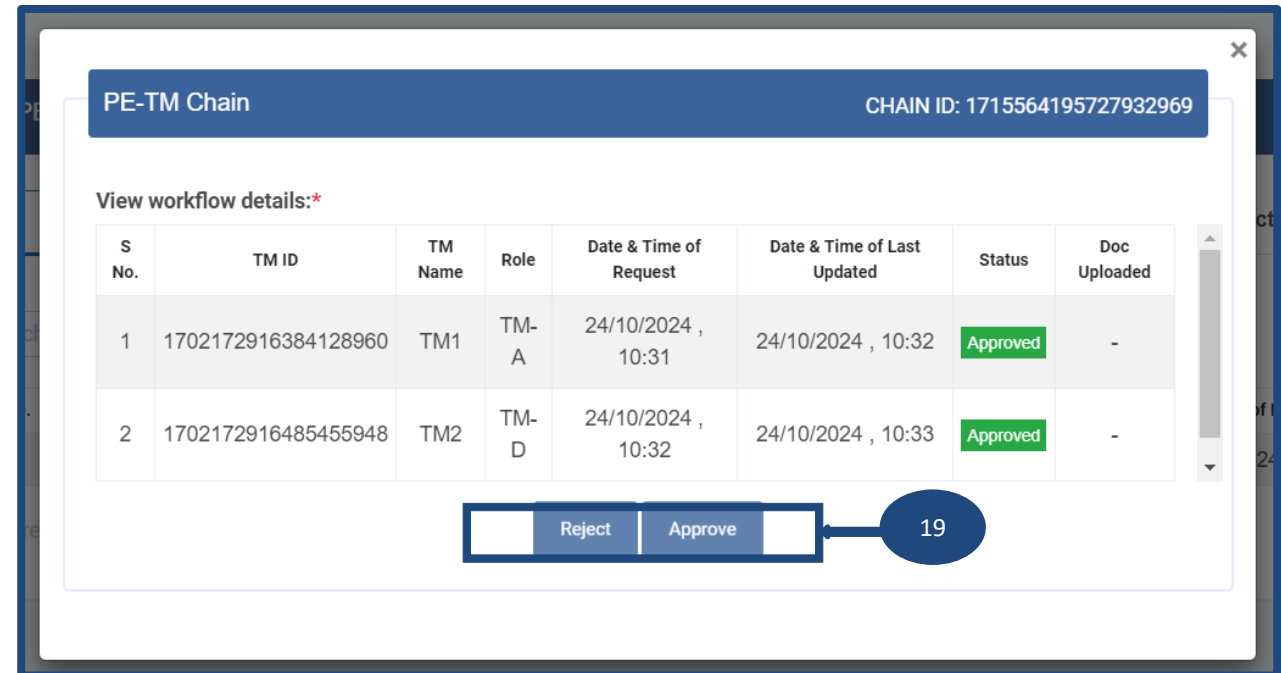


Request approval/rejection by Entity

18 Entity can view the complete chain by clicking on the “chain flow” icon.



19 Under chain flow - Approve & Reject button will be there to take the action on respective chain.



Entity Registered and Rejected/Blacklisted PE-TM Chain Section

20

If approved by the Entity the chain will be visible under the “Registered PE-TM Chain section as status “Active”.

PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain

Search: Search by TM ID [] Show Records: 25

Sl. No.	Rf No.	TM Delivery ID	TM Delivery Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-P2TM2MU8M5G	1702172916485455948	TM2	1715564195727932969	24/10/2024 , 10:31	24/10/2024 , 10:52	Active	

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If Rejected by the Entity the chain will be visible under the “Rejected/Blacklisted PE-TM Chain section as status “Rejected”.

PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain

Search: Search by TM ID [] Show Records: 25 Status: Rejected

Sl. No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Date & Time of Request	Date & Time of Last Updated	Status	Remarks
1	15-P2TM2MVGJ8J	1702172916384128960	TM1	24/10/2024 , 11:06	24/10/2024 , 11:07	Rejected	test

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Chain flow on Entity Panel

22 To view the chain’s final flow click on the view button under the registered PE-TM chain section.

S No.	TM ID	TM Name	Role	Date & Time of Request	Date & Time of Last Updated	Status	Doc Uploaded
1	1702172916384128960	TM1	TM-A	24/10/2024 , 10:31	24/10/2024 , 10:52	Approved	-
2	1702172916485455948	TM2	TM-D	24/10/2024 , 10:32	24/10/2024 , 10:52	Approved	-

Note: If no action is taken within 72Hrs the chain request will automatically get rejected.

Thank You !