



USER MANUAL

CONTENT TEMPLATE

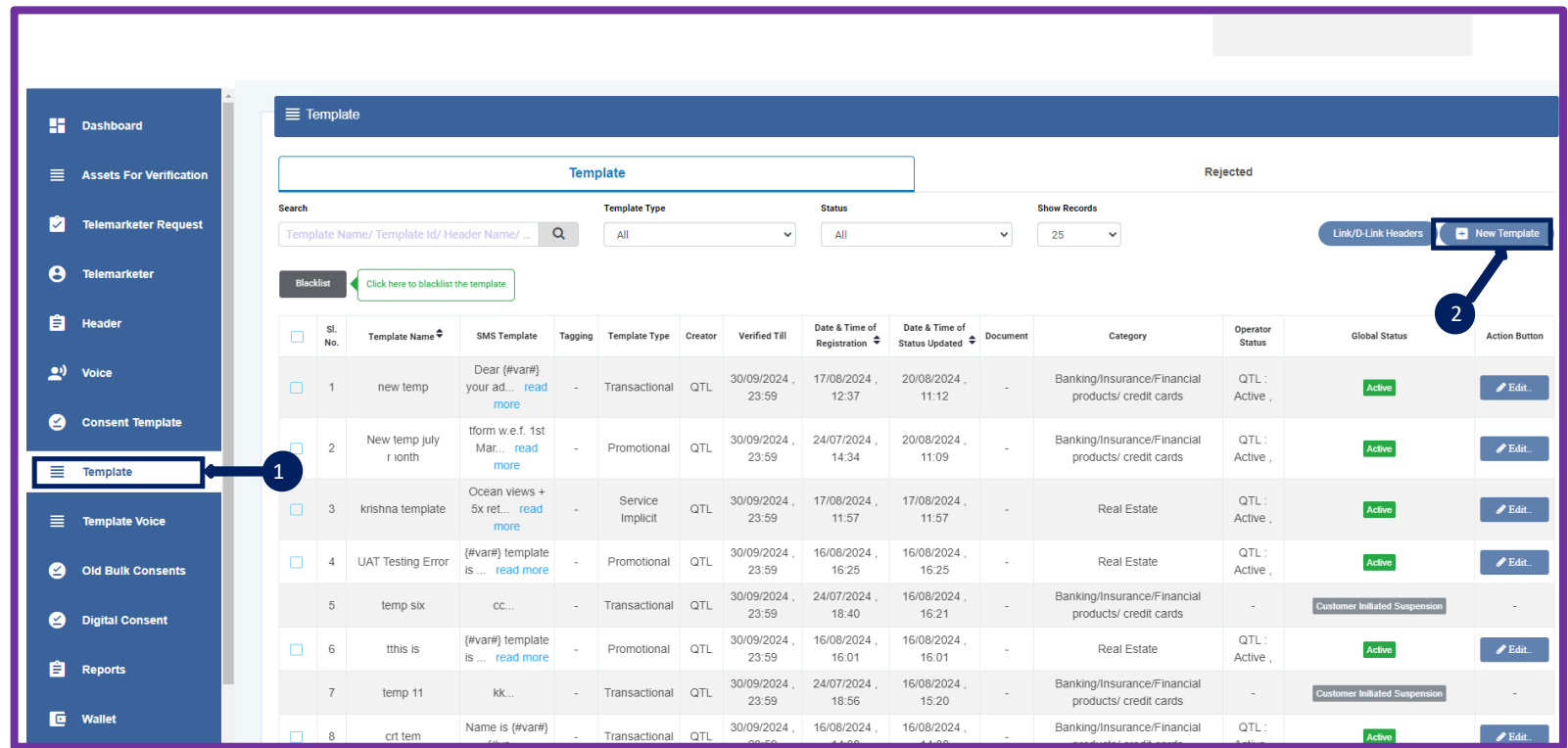
TEMPLATE (CONTENT)

TEMPLATE – CREATION OF NEW TEMPLATE

Templates are created for Commercial Communication and as per TRAI guidelines all the Principal 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.



Sl. No.	Template Name	SMS Template	Tagging	Template Type	Creator	Verified Till	Date & Time of Registration	Date & Time of Status Updated	Document	Category	Operator Status	Global Status	Action Button
1	new temp	Dear (#var#) your ad... read more	-	Transactional	QTL	30/09/2024, 23:59	17/08/2024, 12:37	20/08/2024, 11:12	-	Banking/Insurance/Financial products/ credit cards	QTL : Active	Active	Edit...
2	New temp July month	tform w.e.f. 1st Mar... read more	-	Promotional	QTL	30/09/2024, 23:59	24/07/2024, 14:34	20/08/2024, 11:09	-	Banking/Insurance/Financial products/ credit cards	QTL : Active	Active	Edit...
3	krishna template	Ocean views + 5x ret... read more	-	Service Implicit	QTL	30/09/2024, 23:59	17/08/2024, 11:57	17/08/2024, 11:57	-	Real Estate	QTL : Active	Active	Edit...
4	UAT Testing Error	{#var#} template is ... read more	-	Promotional	QTL	30/09/2024, 23:59	16/08/2024, 16:25	16/08/2024, 16:25	-	Real Estate	QTL : Active	Active	Edit...
5	temp six	cc...	-	Transactional	QTL	30/09/2024, 23:59	24/07/2024, 18:40	16/08/2024, 16:21	-	Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-
6	tthis is	{#var#} template is ... read more	-	Promotional	QTL	30/09/2024, 23:59	16/08/2024, 16:01	16/08/2024, 16:01	-	Real Estate	QTL : Active	Active	Edit...
7	temp 11	kk...	-	Transactional	QTL	30/09/2024, 23:59	24/07/2024, 18:56	16/08/2024, 15:20	-	Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-
8	crt tem	Name is (#var#)	-	Transactional	QTL	30/09/2024, 23:59	16/08/2024, 14:28	16/08/2024, 14:28	-	Banking/Insurance/Financial products/ credit cards	QTL : Active	Active	Edit...

TEMPLATE – SELECTION OF NAME/COMMUNICATION AND CONTENT TYPE

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

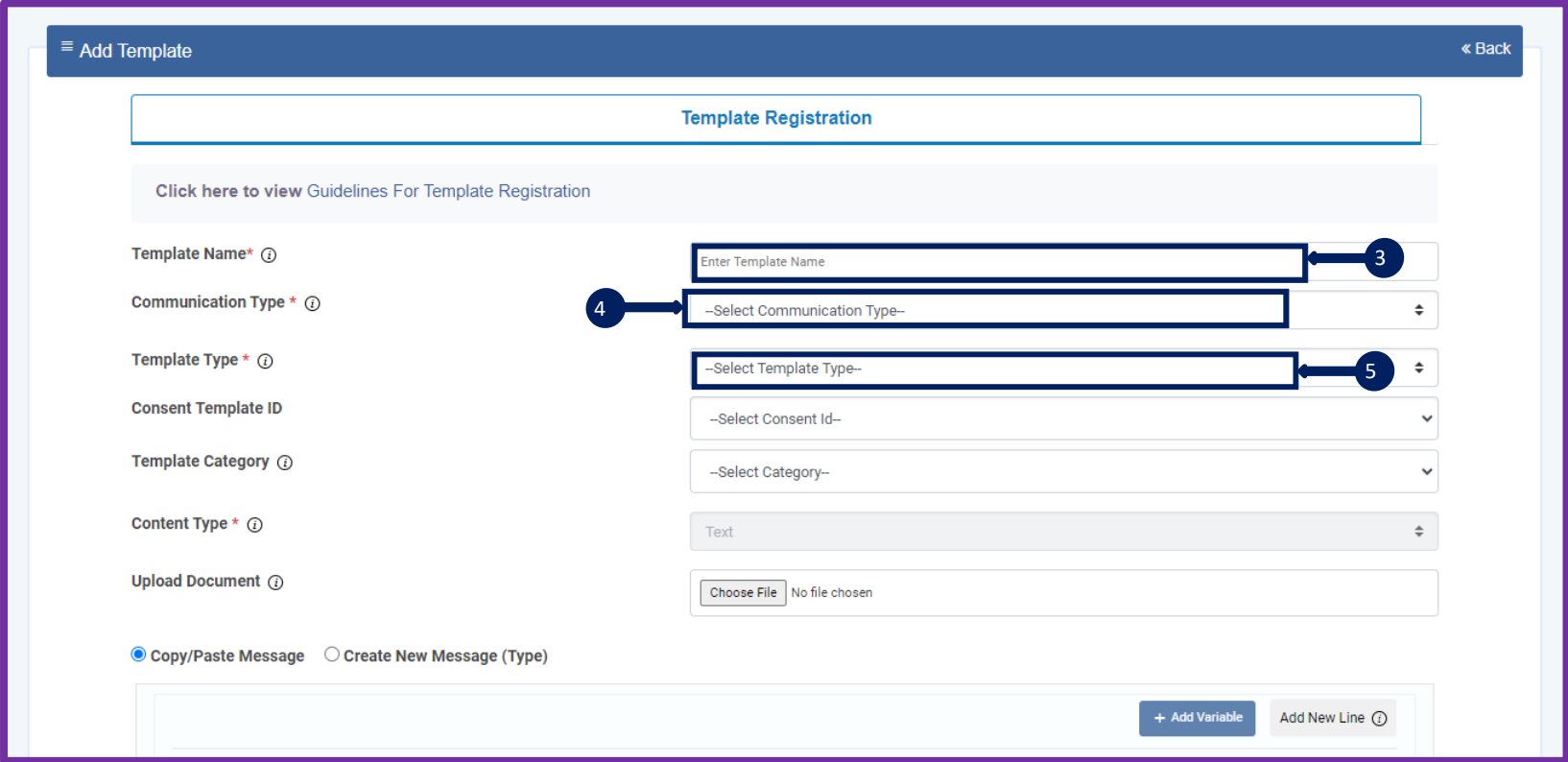
4 In the **Communication Type** column select the type of communication from the following:

- SMS
- Call

Note: Currently SMS is only available for selection.

5 In the **Template Type** select any of the following options:


- Transactional
- Promotional
- Service Explicit
- Service Implicit



The screenshot shows the 'Add Template' interface. At the top, there is a header 'Add Template' with a 'Back' button. Below the header is a 'Template Registration' section with a link to 'Guidelines For Template Registration'. The form contains several fields: 'Template Name*' (text input), 'Communication Type*' (dropdown), 'Template Type*' (dropdown), 'Consent Template ID' (dropdown), 'Template Category' (dropdown), 'Content Type*' (dropdown), and 'Upload Document' (file upload). At the bottom, there are radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)'. There are also '+ Add Variable' and 'Add New Line' buttons. Numbered callouts 3, 4, and 5 point to the Template Name, Communication Type, and Template Type fields respectively.

TEMPLATE – SELECTION OF CONSENT TEMPLATE /CONTENT CATEGORY

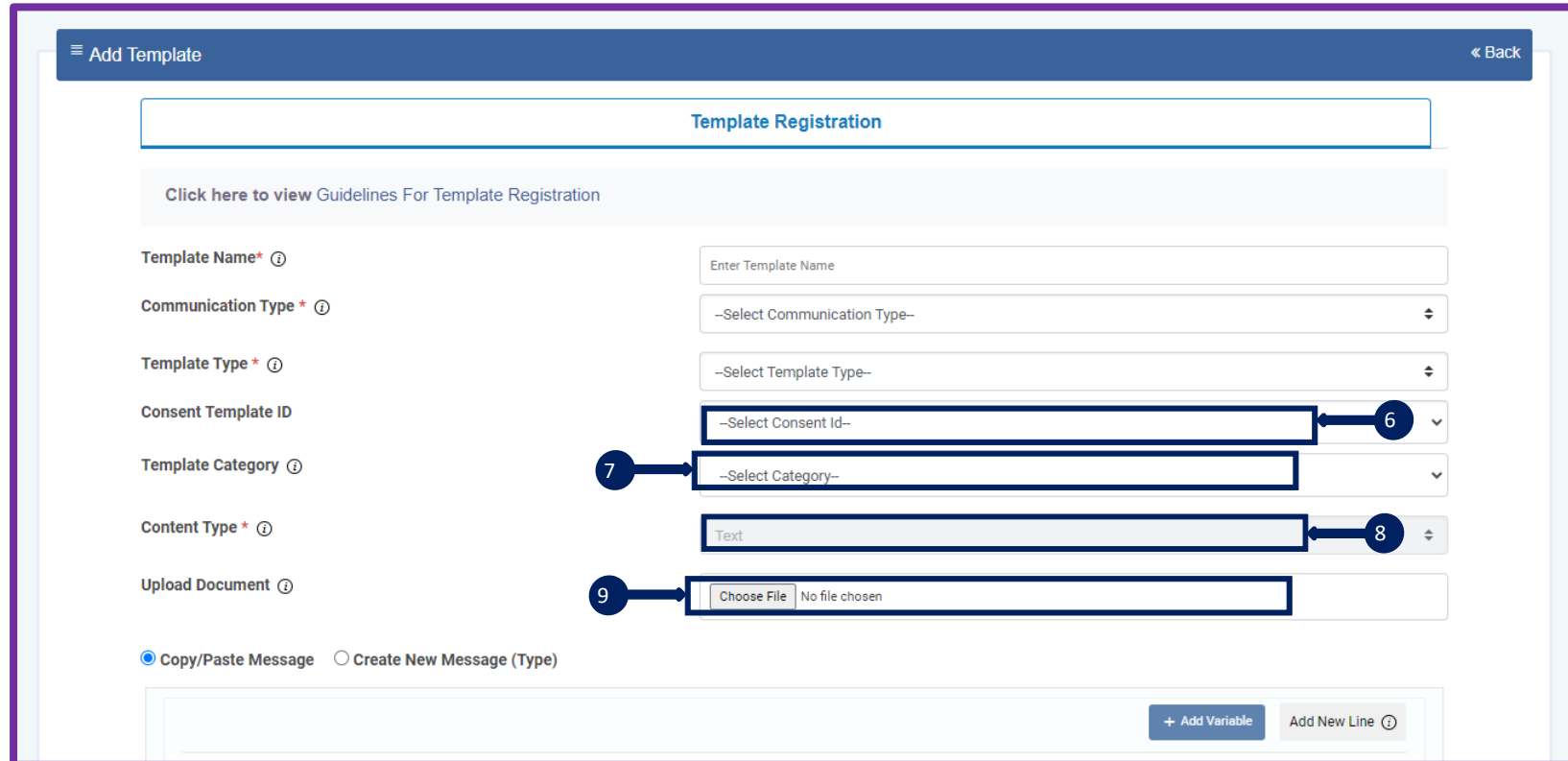
6 In the **Consent Template ID** column select the relevant Consent Template registered on DLT from the dropdown list.

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

7 In the **Template Category** column select any of the Category from the dropdown list as given which is appropriate for the Template to be created.

8 In the **Content 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)*

9 In the **Upload Document** section, users can submit any required supporting documentation.



The screenshot shows the 'Add Template' form with the following fields and callouts:

- 6** points to the 'Consent Template ID' dropdown menu.
- 7** points to the 'Template Category' dropdown menu.
- 8** points to the 'Content Type' dropdown menu, which currently shows 'Text'.
- 9** points to the 'Upload Document' section, which includes a 'Choose File' button and 'No file chosen' text.

Other visible fields include: Template Name* (text input), Communication Type* (dropdown), Template Type* (dropdown), and Content Type* (dropdown). There are also radio buttons for 'Copy/Paste Message' (selected) and 'Create New Message (Type)', and buttons for '+ Add Variable' and 'Add New Line' at the bottom.

TEMPLATE – CREATION OF CONTENT

In the Content creation section there are two options available:

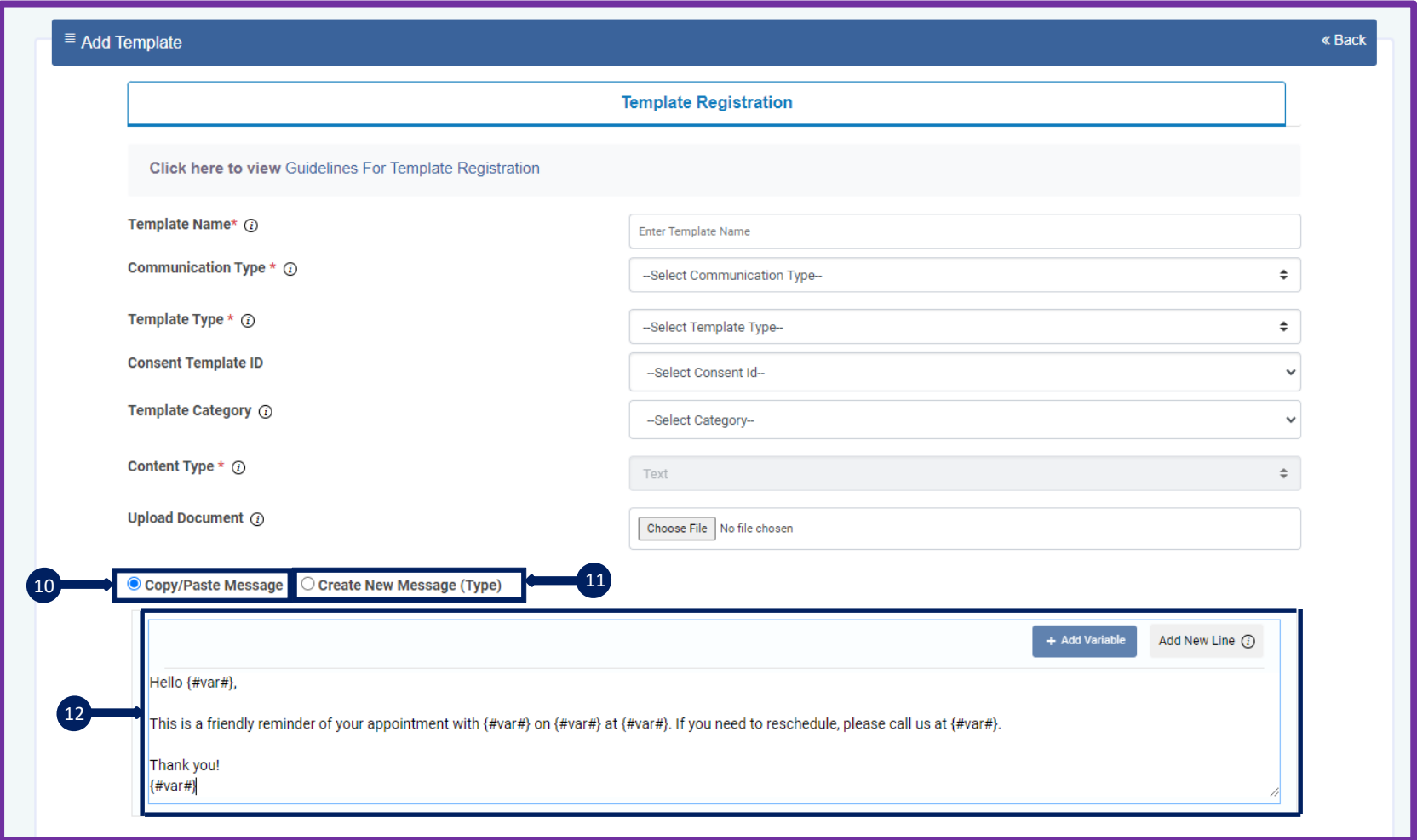
- Copy/Paste Message
- Create New Message(Type)

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. Messages in languages other than English can be created, such templates type will be treated as Unicode

11 In the **Create New Message** option, type the required content.

12 In the **Create New Message Box** type the required content and click on Add variable and Add new line button as required



Add Template ← Back

Template Registration

[Click here to view Guidelines For Template Registration](#)

Template Name* ⓘ

Communication Type* ⓘ

Template Type* ⓘ

Consent Template ID

Template Category ⓘ

Content Type* ⓘ

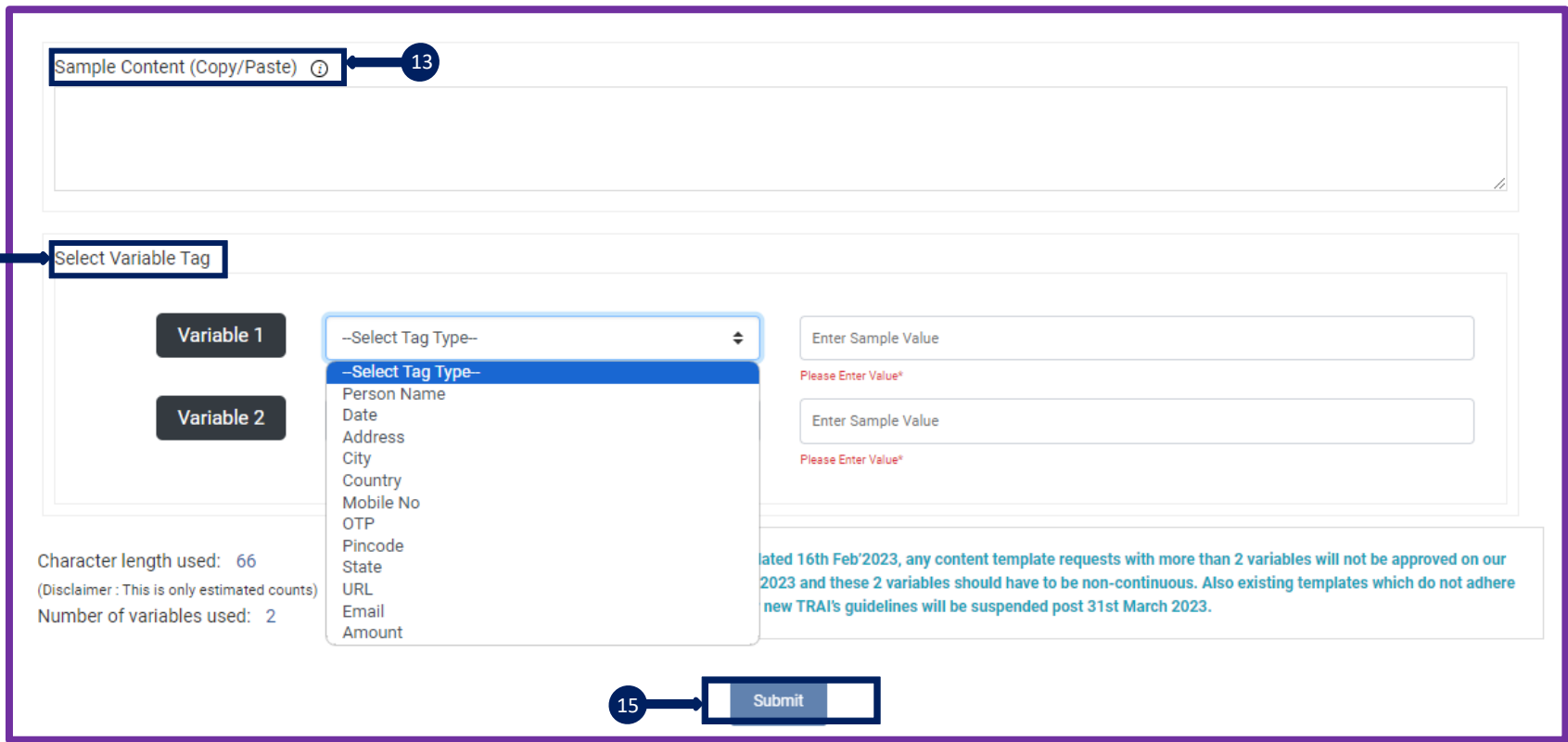
Upload Document ⓘ

Copy/Paste Message Create New Message (Type)

12

TEMPLATE – OTP / REQUEST SUBMISSION

- 13** Fill the sample content of the template created
- 14** Based on number of variable chosen in content. The Entity has to pre-tag the each variable from given options, and enter the sample value.
- 15** Press **Submit** button to confirm and send the request for approval by the Operator.



The screenshot shows a web form for submitting a template. It includes a large text area for 'Sample Content (Copy/Paste)', a 'Select Variable Tag' dropdown menu, two input fields for 'Enter Sample Value', and a 'Submit' button. A dropdown menu is open, showing options like 'Person Name', 'Date', 'Address', etc. A disclaimer at the bottom states: 'Effective from 16th Feb'2023, any content template requests with more than 2 variables will not be approved on our 2023 and these 2 variables should have to be non-continuous. Also existing templates which do not adhere new TRAI's guidelines will be suspended post 31st March 2023.'

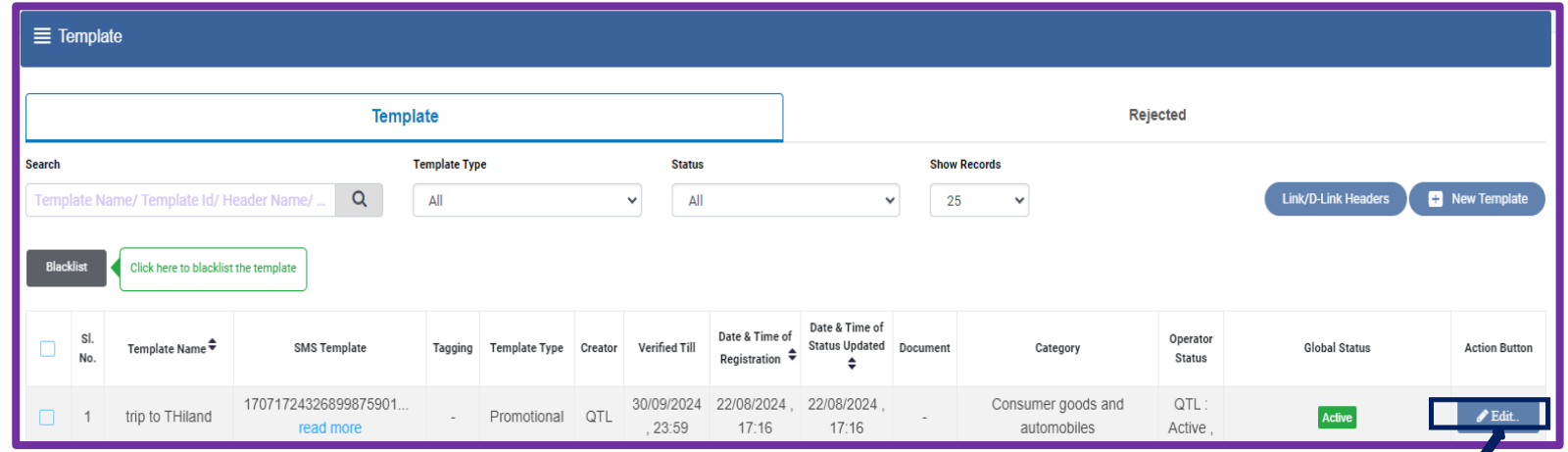
Character length used: 66
(Disclaimer : This is only estimated counts)
Number of variables used: 2

EDIT – TEMPLATE REQUEST

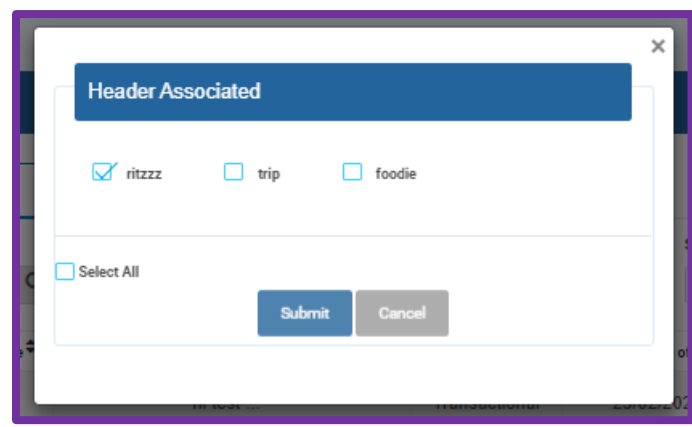
1

Only Header changes can be done in Active Templates. Click on Edit button, Headers associated with Template along with available Headers will appear. The Entity can linked or D-linked the Headers accordingly.

P.S : At least one Header should remain linked with the Template.



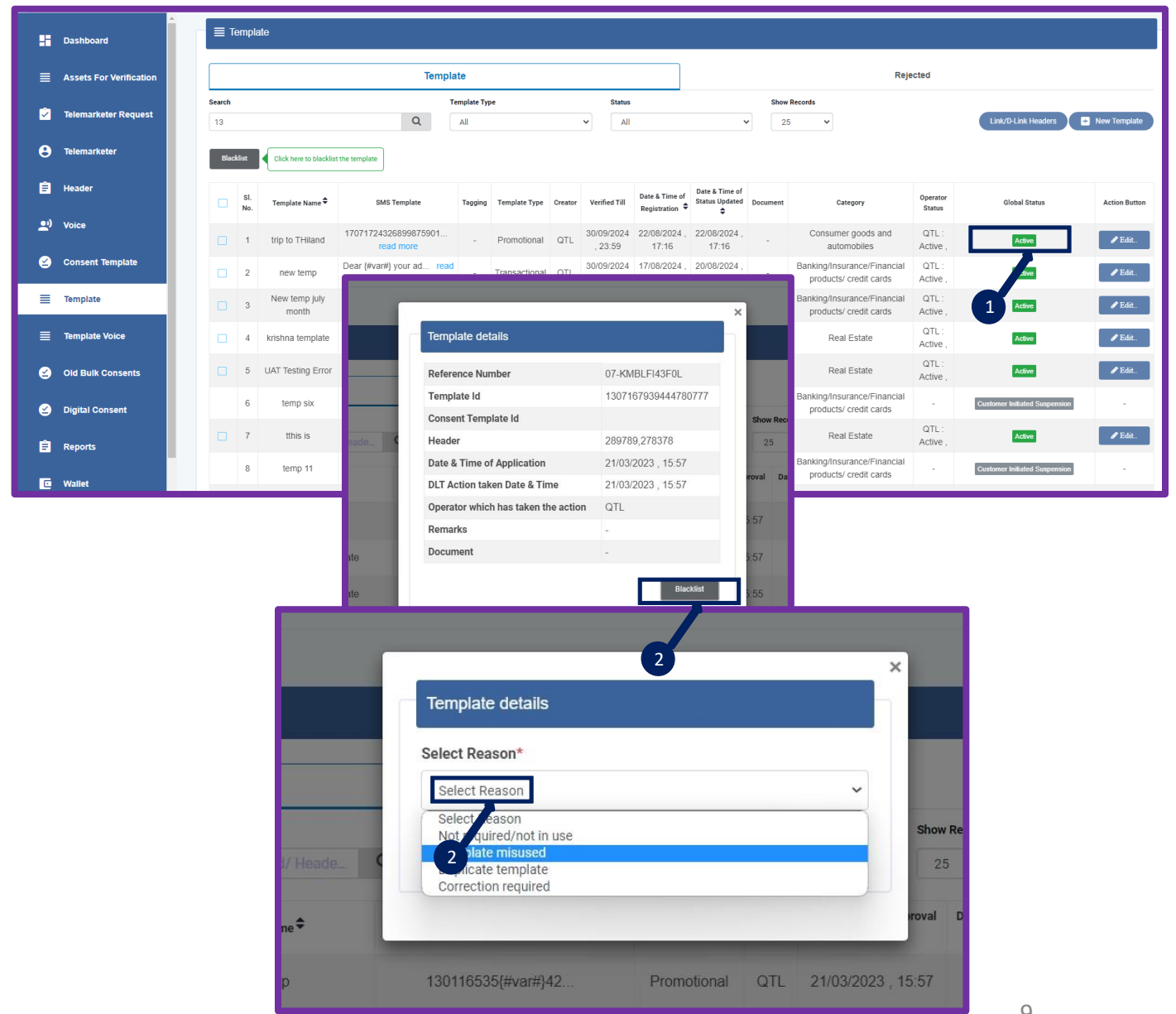
The screenshot shows a web interface for managing templates. At the top, there's a 'Template' header. Below it, there's a search bar and filters for 'Template Type' (All), 'Status' (All), and 'Show Records' (25). There are buttons for 'Link/D-Link Headers' and 'New Template'. A 'Blacklist' button is also present with a link 'Click here to blacklist the template'. Below this is a table with columns: SL. No., Template Name, SMS Template, Tagging, Template Type, Creator, Verified Till, Date & Time of Registration, Date & Time of Status Updated, Document, Category, Operator Status, Global Status, and Action Button. The first row shows a template with SL. No. 1, Template Name 'trip to THiland', and Global Status 'Active'. The 'Action Button' for this row is 'Edit', which is highlighted with a blue circle and the number '1'.



The screenshot shows a dialog box titled 'Header Associated'. It contains a list of headers with checkboxes: 'ritzzz' (checked), 'trip' (unchecked), and 'foodie' (unchecked). There is also a 'Select All' checkbox. At the bottom, there are 'Submit' and 'Cancel' buttons.

BLACKLIST- TEMPLATE REQUEST

- 1 Under BLACKLIST section, click on ACTIVE button Pop- Up will appear.
- 2 The Entity will click on BLACKLIST Button, reason for BLACKLIST can be selected & click on BLACKLIST Button.



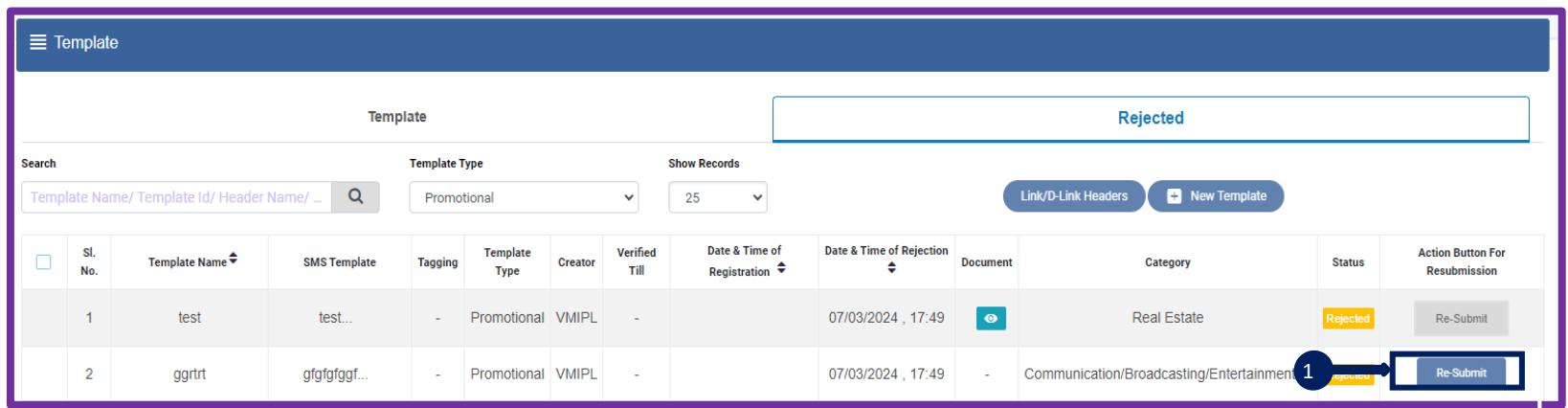
The screenshot displays the 'Template' management interface. The main table lists templates with their respective details. A 'Blacklist' button is located in the top left of the table area. A 'Template details' pop-up window is shown, containing fields for Reference Number, Template Id, Consent Template Id, Header, Date & Time of Application, DLT Action taken Date & Time, Operator which has taken the action, Remarks, and Document. A 'Blacklist' button is also present in this pop-up. A second 'Template details' pop-up is shown, featuring a 'Select Reason*' dropdown menu with options: 'Select Reason', 'Not required/not in use', 'Duplicate template', and 'Correction required'. The 'Duplicate template' option is highlighted. A 'Blacklist' button is also present in this pop-up.

RE-SUBMISSION – TEMPLATE REQUEST

1

Under Rejected section, click on Re-Submit button. Pre-filled form will appear. The Entity can make the changes and re-submit the same for approval.

P.S: New Reference id will be generated for the request Re-submitted.



The screenshot shows a web interface for managing templates. At the top, there is a 'Template' header and a 'Rejected' filter. Below this, there are search and filter options: 'Search' (with a search bar), 'Template Type' (set to 'Promotional'), and 'Show Records' (set to '25'). There are also buttons for 'Link/D-Link Headers' and 'New Template'.

<input type="checkbox"/>	Sl. No.	Template Name	SMS Template	Tagging	Template Type	Creator	Verified Till	Date & Time of Registration	Date & Time of Rejection	Document	Category	Status	Action Button For Resubmission
	1	test	test...	-	Promotional	VMIPL	-		07/03/2024 , 17:49		Real Estate	Rejected	Re-Submit
	2	ggrtrt	gfgfggf...	-	Promotional	VMIPL	-		07/03/2024 , 17:49	-	Communication/Broadcasting/Entertainment	Rejected	Re-Submit

A blue circle with the number '1' and an arrow points to the 'Re-Submit' button in the second row of the table.

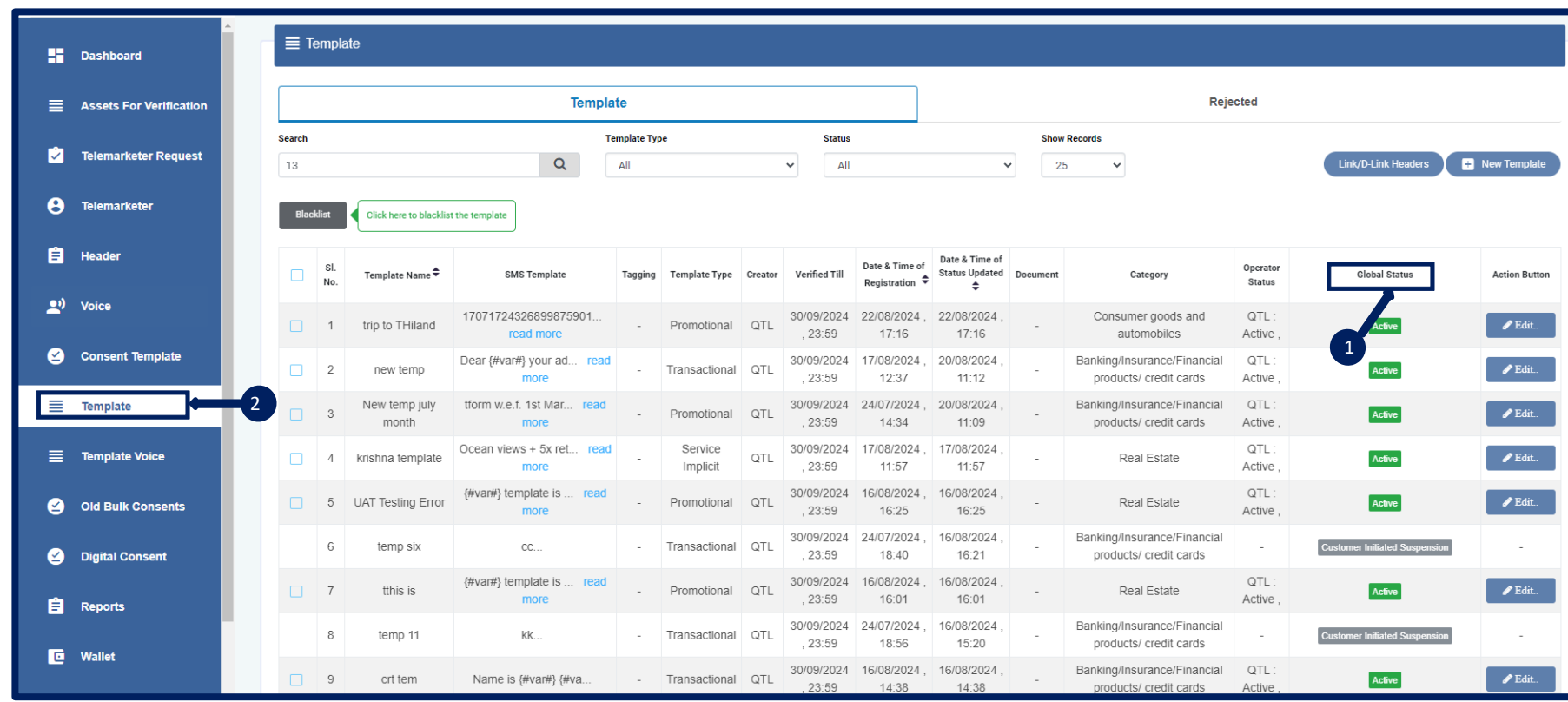
Status – OTHER TSP’s TEMPLATE

1

All the Template registered with other TSP will reflect In Template Tab along with Global status and operator-wise status.

2

Its not active on STPL till the time operator approves the same.
Once action taken by the STPL it will reflect under operator status.



Template

Search: 13 | Template Type: All | Status: All | Show Records: 25

Blacklist [Click here to blacklist the template](#)

Sl. No.	Template Name	SMS Template	Tagging	Template Type	Creator	Verified Till	Date & Time of Registration	Date & Time of Status Updated	Document	Category	Operator Status	Global Status	Action Button
1	trip to THiland	17071724326899875901... read more	-	Promotional	QTL	30/09/2024, 23:59	22/08/2024, 17:16	22/08/2024, 17:16	-	Consumer goods and automobiles	QTL : Active,	Active	Edit..
2	new temp	Dear {#var#} your ad... read more	-	Transactional	QTL	30/09/2024, 23:59	17/08/2024, 12:37	20/08/2024, 11:12	-	Banking/Insurance/Financial products/ credit cards	QTL : Active,	Active	Edit..
3	New temp july month	tform w.e.f. 1st Mar... read more	-	Promotional	QTL	30/09/2024, 23:59	24/07/2024, 14:34	20/08/2024, 11:09	-	Banking/Insurance/Financial products/ credit cards	QTL : Active,	Active	Edit..
4	krishna template	Ocean views + 5x ret... read more	-	Service Implicit	QTL	30/09/2024, 23:59	17/08/2024, 11:57	17/08/2024, 11:57	-	Real Estate	QTL : Active,	Active	Edit..
5	UAT Testing Error	{#var#} template is ... read more	-	Promotional	QTL	30/09/2024, 23:59	16/08/2024, 16:25	16/08/2024, 16:25	-	Real Estate	QTL : Active,	Active	Edit..
6	temp six	cc...	-	Transactional	QTL	30/09/2024, 23:59	24/07/2024, 18:40	16/08/2024, 16:21	-	Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-
7	itthis is	{#var#} template is ... read more	-	Promotional	QTL	30/09/2024, 23:59	16/08/2024, 16:01	16/08/2024, 16:01	-	Real Estate	QTL : Active,	Active	Edit..
8	temp 11	kk...	-	Transactional	QTL	30/09/2024, 23:59	24/07/2024, 18:56	16/08/2024, 15:20	-	Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-
9	crt tem	Name is {#var#} {#va...}	-	Transactional	QTL	30/09/2024, 23:59	16/08/2024, 14:38	16/08/2024, 14:38	-	Banking/Insurance/Financial products/ credit cards	QTL : Active,	Active	Edit..

STATUS – OTHER TSP’S TEMPLATE

1

Once the operator approve the request header will reflect under operator wise status as active.

☰ Template

Template

Rejected

Search

Template Type

All

Status

All

Show Records

25

[Link/D-Link Headers](#)
[New Template](#)

Blacklist

[Click here to blacklist the template](#)

<input type="checkbox"/>	Sl. No.	Template Name	SMS Template	Tagging	Template Type	Creator	Verified Till	Date & Time of Registration	Date & Time of Status Updated	Document	Category	Operator Status	Global Status	Action Button
<input type="checkbox"/>	101	febnewtemp GKS for rej five	copy paste...	-	Transactional	QTL	-	13/02/2023 , 13:22	19/04/2024 , 19:42	-	Banking/Insurance/Financial products/ credit cards	QTL : Active ,	Active	Edit..
<input type="checkbox"/>	102	TEMP 21	cc...	-	Transactional	QTL	-	19/12/2022 , 23:58	19/04/2024 , 19:42	-	Banking/Insurance/Financial products/ credit cards	QTL : Active ,	Active	Edit..
<input type="checkbox"/>	103	New Template	NEEW TEMPLATE FOR LA... read more	-	Service Explicit	VMIPL	31/12/2023 , 23:59	23/11/2023 , 12:58	19/04/2024 , 19:42	-	Consumer goods and automobiles	VMIPL : Active ,	Active	Edit..
<input type="checkbox"/>	104	AGRO1	Copy...	-	Promotional	QTL	-	04/01/2023 , 16:18	19/04/2024 , 19:42	-	Banking/Insurance/Financial products/ credit cards	QTL : Active ,	Active	Edit..
<input type="checkbox"/>	105	Shaivya Template	{ "htyp": "T", "ttyp": "... read more	-	Transactional	QTL	-	24/01/2023 , 17:34	19/04/2024 , 19:42	-	Banking/Insurance/Financial products/ credit cards	QTL : Active ,	Active	Edit..
<input type="checkbox"/>	106	temp for by vm	cc...	-	Transactional	VMIPL	31/12/2023 , 23:59	25/11/2023 , 20:30	19/04/2024 , 19:42	-	Banking/Insurance/Financial products/ credit cards	VMIPL : Active ,	Active	Edit..

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Thank You !