

SMART ENTERPRISE
S O L U T I O N S

Welcome to Smart Enterprise Solutions

USER MANUAL
CONTENT
TEMPLATE

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, a sidebar contains various navigation options, with 'Template' highlighted. The main area features a search bar and filters for 'Template Type' and 'Status'. A 'New Template' button is located in the top right corner. Below these elements is a table listing existing templates. The table has the following 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 table contains 8 rows of data, each representing a different template with its specific details and an 'Edit...' button.

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

☰ Add Template
◀ Back

Template Registration

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

Template Name* ⓘ

Communication Type* ⓘ

--Select Communication Type--
⌵

Template Type* ⓘ

--Select Template Type--
⌵

Consent Template ID

--Select Consent Id--
⌵

Template Category ⓘ

--Select Category--
⌵

Content Type* ⓘ

Text
⌵

Upload Document ⓘ

No file chosen


Instructions:

When registering the template, it is mandatory to pre-tag each variable chosen in the content. Choose the correct tag from the dropdown menu under "Select Variable Tag" to pre-tag the variable. Please provide a sample value for each selected tag to proceed. [Click here](#) for more information.

Copy/Paste Message
 Create New Message (Type)

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.


☰ Add Template
« Back


Template Registration


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

Template Name* 


Communication Type* 


--Select Communication Type--



Template Type* 


--Select Template Type--



Consent Template ID


--Select Consent Id--


Template Category 

--Select Category--


Content Type* 

Text



Upload Document 

Choose File
No file chosen

Instructions:

When registering the template, it is mandatory to pre-tag each variable chosen in the content. Choose the correct tag from the dropdown menu under "Select Variable Tag" to pre-tag the variable. Please provide a sample value for each selected tag to proceed. [Click here](#) for more information.

Copy/Paste Message Create New Message (Type)

+ Add Variable
Add New Line 

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

The screenshot displays the 'Add Template' interface. At the top, there is a 'Back' button. The main section is titled 'Template Registration' and contains a link to 'Guidelines For Template Registration'. The form fields are as follows:

- Template Name***: Text input field with placeholder 'Enter Template Name'.
- Communication Type***: Dropdown menu with '--Select Communication Type--'.
- Template Type***: Dropdown menu with '--Select Template Type--'.
- Consent Template ID**: Dropdown menu with '--Select Consent Id--'.
- Template Category**: Dropdown menu with '--Select Category--'.
- Content Type***: Dropdown menu with 'Text' selected.
- Upload Document**: File upload area with a 'Choose File' button and 'No file chosen' text.

Below the form, there are two radio buttons: **Copy/Paste Message** (selected) and **Create New Message (Type)**. Below these is a text editor containing the following text:

```

Hello {#var#},
This is a friendly reminder of your appointment with {#var#} on {#var#} at {#var#}. If you need to reschedule, please call us at {#var#}.
Thank you!
{#var#}
    
```

At the top right of the text editor are two buttons: '+ Add Variable' and 'Add New Line'.

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, a 'Variable 1' label, a 'Tag Type' dropdown menu, and an 'Enter Sample Value' input field. A 'Submit' button is located at the bottom right. A disclaimer and a notice are visible at the bottom of the form area.

Character length used: 0
(Disclaimer : This is only estimated)
Number of variables used:

b'2023, any content template requests with more than 2 platform w.e.f. 1st March 2023 and these 2 variables should templates which do not adhere to the "variable" format as and post 31st March 2023.

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 the 'Template' management interface. At the top, there is a search bar and filters for 'Template Type' (All), 'Status' (All), and 'Show Records' (25). Below the filters, there is a 'Blacklist' button and a link 'Click here to blacklist the template'. The main part of the interface is a table with the following 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 in the table has the following data: Sl. No. 1, Template Name 'trip to THiland', SMS Template '17071724326899875901...', Tagging '-', Template Type 'Promotional', Creator 'QTL', Verified Till '30/09/2024, 23:59', Date & Time of Registration '22/08/2024, 17:16', Date & Time of Status Updated '22/08/2024, 17:16', Document '-', Category 'Consumer goods and automobiles', Operator Status 'QTL : Active', Global Status 'Active', and Action Button 'Edit'. The 'Edit' button is highlighted with a blue circle and a callout line.

1

The screenshot shows the 'Header Associated' dialog box. It has a title bar with a close button. Below the title, there is a list of headers with checkboxes: 'ritzzz' (checked), 'trip' (unchecked), and 'foodie' (unchecked). At the bottom, there is a 'Select All' checkbox (unchecked) and two buttons: 'Submit' and 'Cancel'.

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. On the left is a navigation menu with options like Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header, Voice, Consent Template, Template, Template Voice, Old Bulk Consents, Digital Consent, Reports, and Wallet. The main area shows a 'Template' table with columns for 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. A 'Blacklist' button is visible above the table. A pop-up window titled 'Template details' shows information for a specific template, including 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. Another pop-up window titled 'Select Reason*' shows a dropdown menu with options: Select Reason, Not required/not in use, Duplicate template, and Correction required. A third pop-up window shows the 'Blacklist' button being clicked, with a 'Blacklist' label appearing below it.

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	-	Transactional	QTL	30/09/2024	17/08/2024	20/08/2024	-	Banking/Insurance/Financial products/ credit cards	QTL : Active	Active	Edit
3	New temp July month									Banking/Insurance/Financial products/ credit cards	QTL : Active	Active	Edit
4	krishna template									Real Estate	QTL : Active	Active	Edit
5	UAT Testing Error									Real Estate	QTL : Active	Active	Edit
6	temp six									Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-
7	tthis is									Real Estate	QTL : Active	Active	Edit
8	temp 11									Banking/Insurance/Financial products/ credit cards	-	Customer Initiated Suspension	-

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's a 'Template' header and a 'Rejected' filter. Below the header, 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'. The main part of the interface is a table with the following columns: Sl. No., Template Name, SMS Template, Tagging, Template Type, Creator, Verified Till, Date & Time of Registration, Date & Time of Rejection, Document, Category, Status, and Action Button For Resubmission. Two rows are visible. The first row has 'test' as the template name and 'Real Estate' as the category. The second row has 'ggrtrt' as the template name and 'Communication/Broadcasting/Entertainment' as the category. A callout '1' points to the 'Re-Submit' button in the 'Action Button For Resubmission' column of the second row.

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

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 VM IPL till the time operator approves the same.

Once action taken by the VM IPL it will reflect under operator status.

The screenshot displays the 'Template' management interface. On the left is a sidebar with navigation options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header, Voice, Consent Template, **Template** (highlighted with a blue circle and arrow labeled '2'), Template Voice, Old Bulk Consents, Digital Consent, Reports, and Wallet. The main content area shows a table of templates. At the top, there are search and filter options: Search (13), Template Type (All), Status (All), and Show Records (25). A 'Blacklist' button with a link 'Click here to blacklist the template' is present. The table has the following 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 'Global Status' column is highlighted with a blue box and a callout labeled '1' pointing to the 'Active' status of the first row. The table contains 9 rows of data, with some rows showing 'Customer Initiated Suspension' in the Operator Status column.

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 re... 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			Status			Show Records					
13			All			All			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..

Thank You !