



# USER MANUAL

## HEADER

# HEADER

## P – Promotional -

Messages which are purely promotional in nature send to all the prospects in the database by an Entity basis on there preferences. Ex : All kind of Promotional messages.

## O – Others- Includes Transactional, Service Implicit and Service Explicit messages.

(Transactional - Essential messages related to transaction. Ex: OTP.

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

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

## HEADER CREATION - VALIDATION TABLE

### Instructions:

- **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. Will be created numeric headers.
- **O – Others**- Includes **Transactional**, **Service Implicit** and **Service Explicit** messages  
 (Transactional - Essential messages related to transaction. Ex: OTP.  
**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. Will be created Alpha and Alphanumeric headers  
**Service** - Service messages that are ought to be sent basis on the business relation with the customer.Ex: Service Alert Messages)

**Note :** Special Character and Space not allowed in Header Name.

| Header Type     | Entity Type   | Type                                 |             | Validations                                  |
|-----------------|---------------|--------------------------------------|-------------|--|
| Promotional (P) | Govt/Non Govt | Numeric                              | Allowed     | Header name must be of 6 digits              |
|                 |               | Alphabetic                           | Not Allowed |  |
|                 |               | Alphanumeric                         | Not Allowed |  |
| Others (O)      | Govt.         | Numeric (3-5 character) start with 1 | Allowed     | Header name must be between 3-5 digits       |
|                 |               | Alphabetic (3-6 character)           | Allowed     | Header name must be between 3-6 alphabets    |
|                 |               | Alphanumeric (3-6 character)         | Allowed     | Header name must be between 3-6 alphanumeric |
| Others (O)      | Non-Govt.     | Numeric                              | Not Allowed | Header name must be between 3-6 alphabets    |
|                 |               | Alphabetic (3-6 character)           | Allowed     | Header name must be between 3-6 alphanumeric |
|                 |               | Alphanumeric (3-6 character)         | Allowed     | Header name must be between 3-6 alphanumeric |

Close

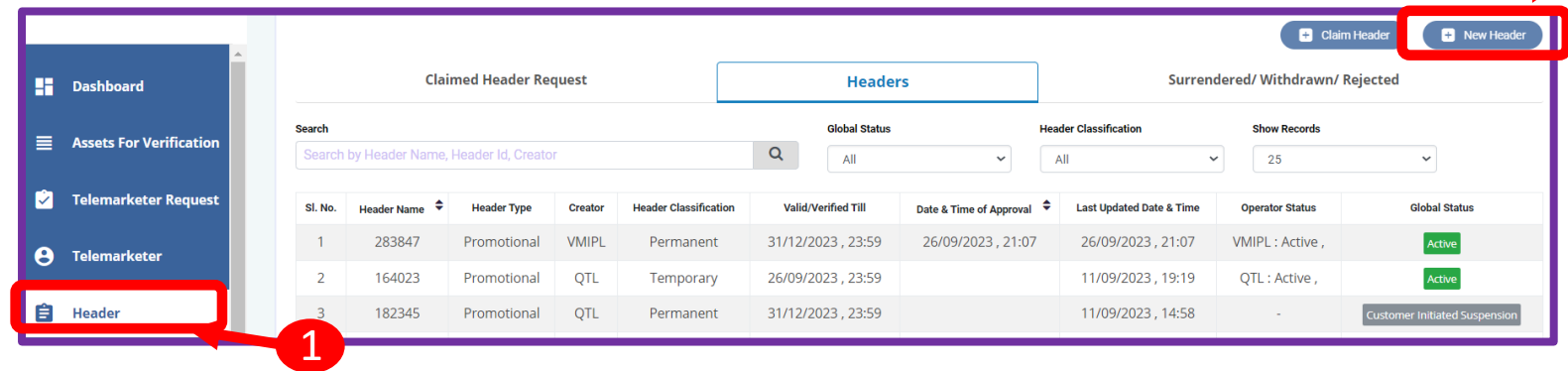
## HEADER CREATION – HEADER PAGE

1

Click **Header** on left navigation bar to see the detailed view of all the Headers.

2

Click **New Header** to create Header(s) request. User can create 20 Header request in one go.



The screenshot displays the 'Headers' management page. On the left, the navigation menu includes 'Dashboard', 'Assets For Verification', 'Telemarketer Request', 'Telemarketer', and 'Header'. The 'Header' option is highlighted with a red box and a red circle containing the number 1. The main content area shows a table of headers with the following data:

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Operator Status  | Global Status                 |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|------------------|-------------------------------|
| 1       | 283847      | Promotional | VMIPL   | Permanent             | 31/12/2023, 23:59   | 26/09/2023, 21:07       | 26/09/2023, 21:07        | VMIPL : Active , | Active                        |
| 2       | 164023      | Promotional | QTL     | Temporary             | 26/09/2023, 23:59   |                         | 11/09/2023, 19:19        | QTL : Active ,   | Active                        |
| 3       | 182345      | Promotional | QTL     | Permanent             | 31/12/2023, 23:59   |                         | 11/09/2023, 14:58        | -                | Customer Initiated Suspension |

At the top right of the main content area, there are two buttons: 'Claim Header' and 'New Header'. The 'New Header' button is highlighted with a red box and a red circle containing the number 2.

# HEADER CREATION – TYPE & CATEGORY SELECTION

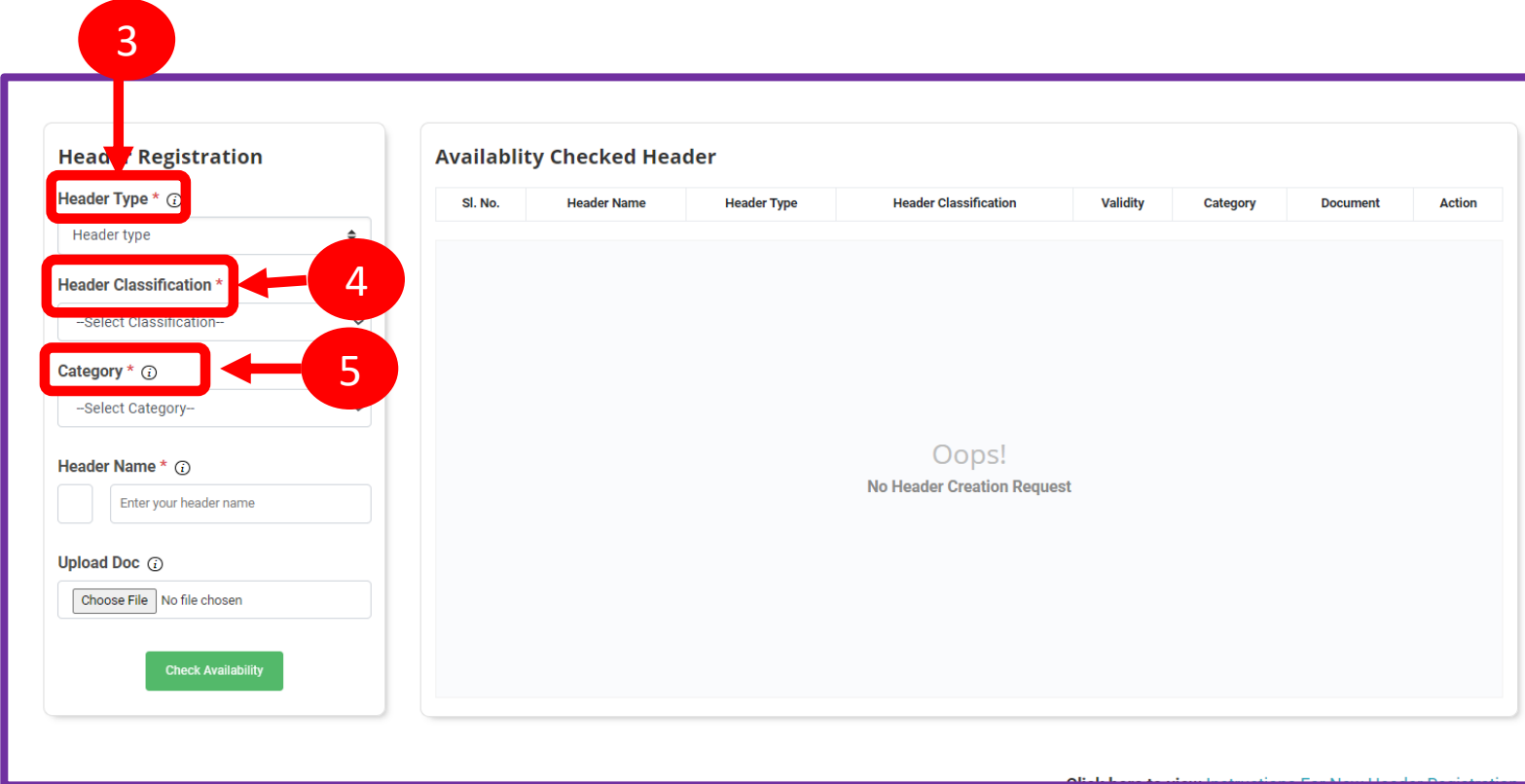
**3** Click **Header Type** and choose the type of Header from the list mentioned.

- Promotional
- Other

Header Type depends on the type of the commercial communication message that needs to be sent with that header. (Eg: Promotional for promotional messages and for all other select the Other type)

**4** Click on “**Header Classification**” to choose the Temporary OR Permanent.  
If Temporary the Entity has to choose the validity also- 15/30/45/60

**5** Select the **Category** from the dropdown as per your business requirement.



### Header Registration

**Header Type \*** ⓘ

Header type

**Header Classification \*** ⓘ

--Select Classification--

**Category \*** ⓘ

--Select Category--

**Header Name \*** ⓘ

**Upload Doc** ⓘ

No file chosen

### Availability Checked Header

| Sl. No.  | Header Name | Header Type | Header Classification | Validity | Category | Document | Action |
|--|-------------|-------------|-----------------------|----------|----------|----------|--------|
| <p>Oops!</p> <p>No Header Creation Request</p> |             |             |                       |          |          |          |        |

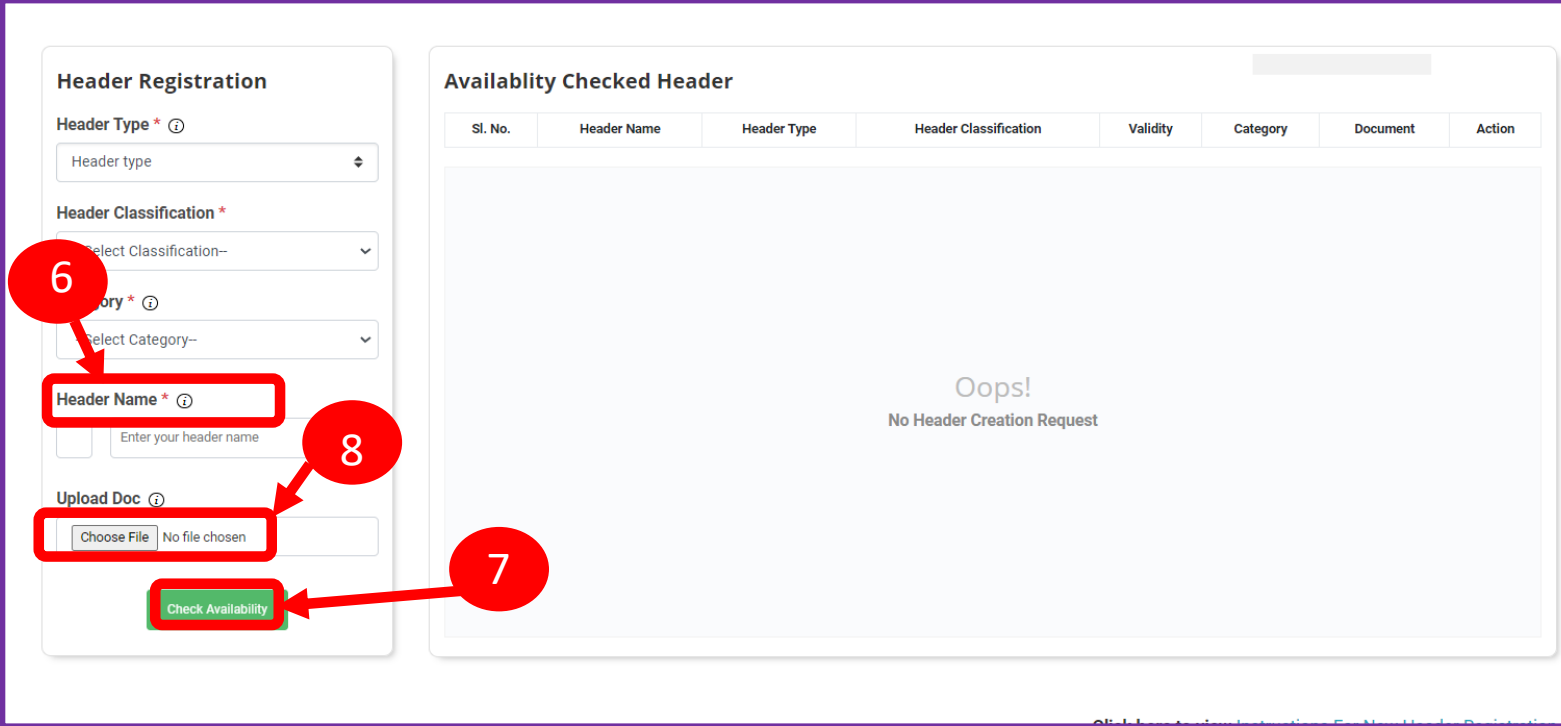
# HEADER CREATION – NAME, AVAILABILITY & DOC UPLOAD

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

- 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 VALIDATION TABLE on slide no 6 to understand the validations and possible types of headers that can be created under various categories for Govt and Non-Govt entities.*

**7** Click **Check Availability** to check the availability of header name. If available proceed with next step. If not available follow the claim process.

**8** Upload relevant document related to header by clicking on **Choose File** button.



### Header Registration

Header Type \* ⓘ  
Header type

Header Classification \*  
Select Classification--

Category \* ⓘ  
Select Category--

Header Name \* ⓘ  
Enter your header name

Upload Doc ⓘ  
Choose File | No file chosen

**Check Availability**

### Availability Checked Header

| Sl. No.                             | Header Name | Header Type | Header Classification | Validity | Category | Document | Action |
|-------------------------------------|-------------|-------------|-----------------------|----------|----------|----------|--------|
| Oops!<br>No Header Creation Request |             |             |                       |          |          |          |        |

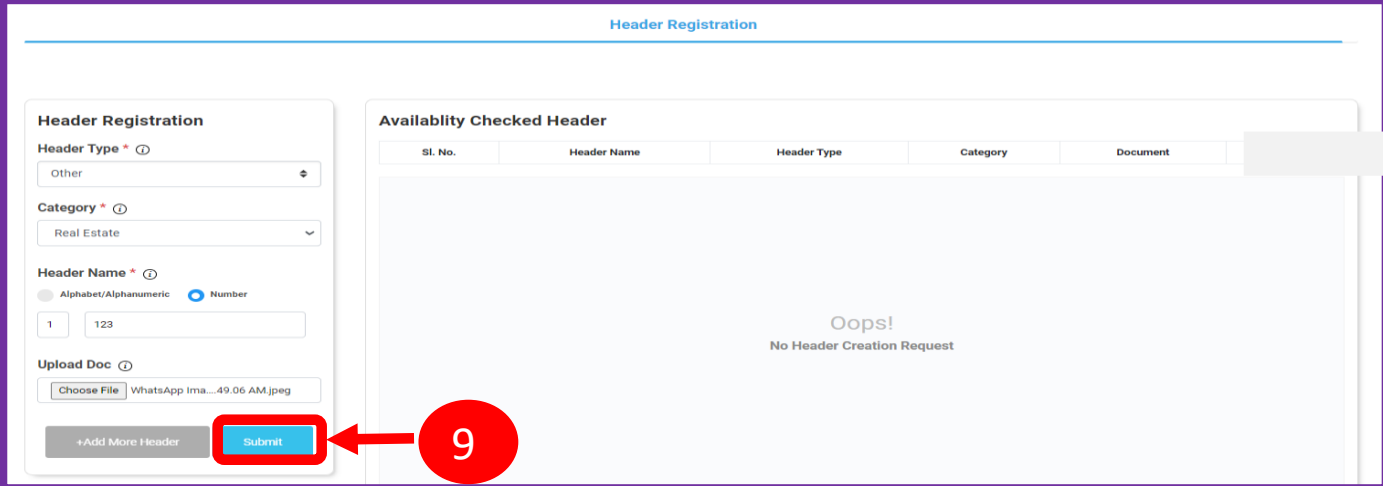
# HEADER CREATION – OTP VERIFICATION & REQUEST SUBMISSION

**9** Click on **Submit** button to submit the header request.

**10** An **OTP box** will appear.

**11** Click on the **Get OTP** button. Instantly an One Time Password (OTP) will be send to the registered Mobile and Email Id. Type the OTP in the given box

**12** Click on the **Submit** button. On successful submission of request a message will appear on the top of the screen.



Header Registration

Header Type \*

Category \*

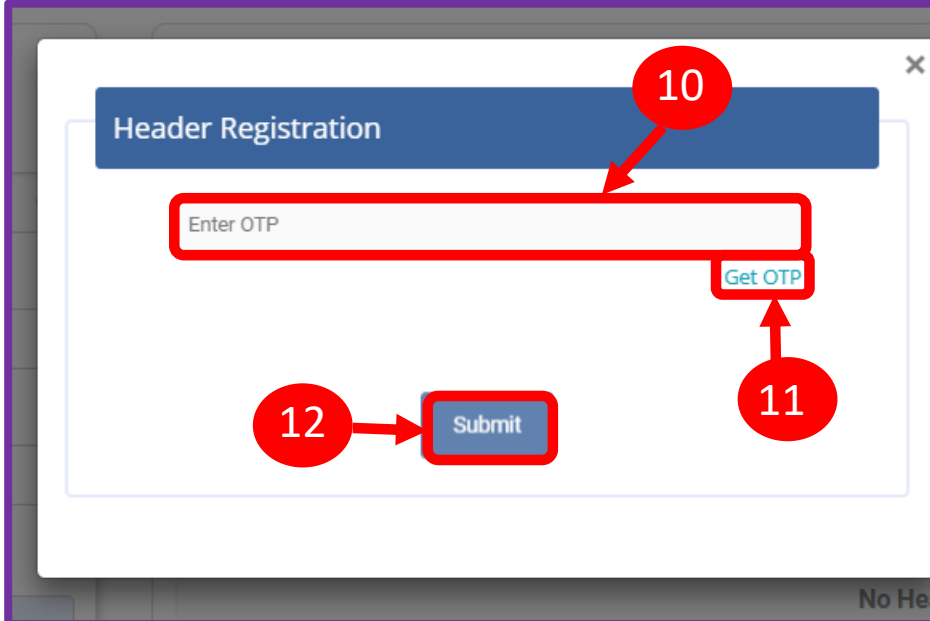
Header Name \*

Upload Doc  WhatsApp ima...49.06 AM.jpeg

+Add More Header

Availability Checked Header

| Sl. No.                             | Header Name | Header Type | Category | Document |
|-------------------------------------|-------------|-------------|----------|----------|
| Oops!<br>No Header Creation Request |             |             |          |          |



Header Registration

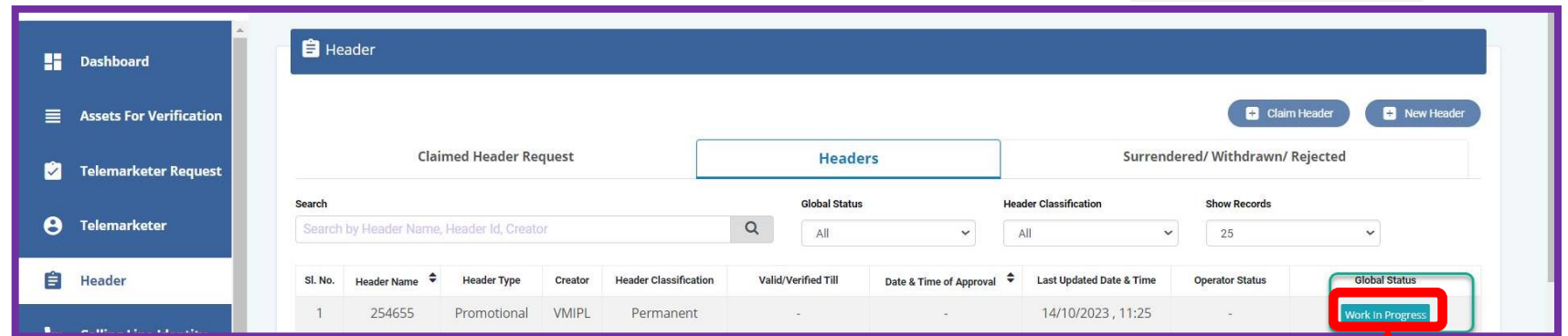
Enter OTP

# HEADER CREATION – HEADER STATUS

13

Once you submit the header request it will show in the header section with the status as **WORK IN PROGRESS**.

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



The screenshot shows the 'Header' management interface. On the left is a navigation menu with options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, and Header. The main area is titled 'Header' and contains tabs for 'Claimed Header Request', 'Headers', and 'Surrendered/ Withdrawn/ Rejected'. Below the tabs is a search bar and filters for 'Global Status' (set to 'All'), 'Header Classification' (set to 'All'), and 'Show Records' (set to '25'). A table displays the following data:

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Operator Status | Global Status    |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|-----------------|------------------|
| 1       | 254655      | Promotional | VMIPL   | Permanent             | -                   | -                       | 14/10/2023, 11:25        | -               | Work In Progress |

The 'Global Status' column for the first row is highlighted with a red box, and a red arrow points to it from a red circle containing the number '13'.

13

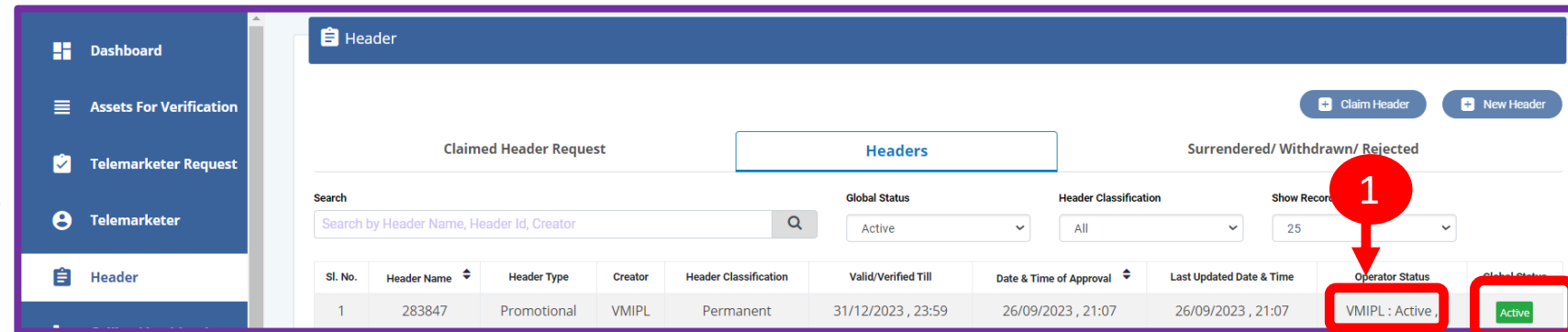


## STATUS – OTHER TSP’S HEADER

**1** All the header registered with other TSP will reflect In Header Tab with Global status and operator wise status

**2** It is not active on STPL till the time the operator approves the same.

Once action is taken by the STPL it will reflect under operator status.



Header

Claimed Header Request

Search by Header Name, Header Id, Creator

Global Status: Active

Header Classification: All

Show Records: 25

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Operator Status | Global Status |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|-----------------|---------------|
| 1       | 283847      | Promotional | VMIPL   | Permanent             | 31/12/2023, 23:59   | 26/09/2023, 21:07       | 26/09/2023, 21:07        | VMIPL : Active, | Active        |

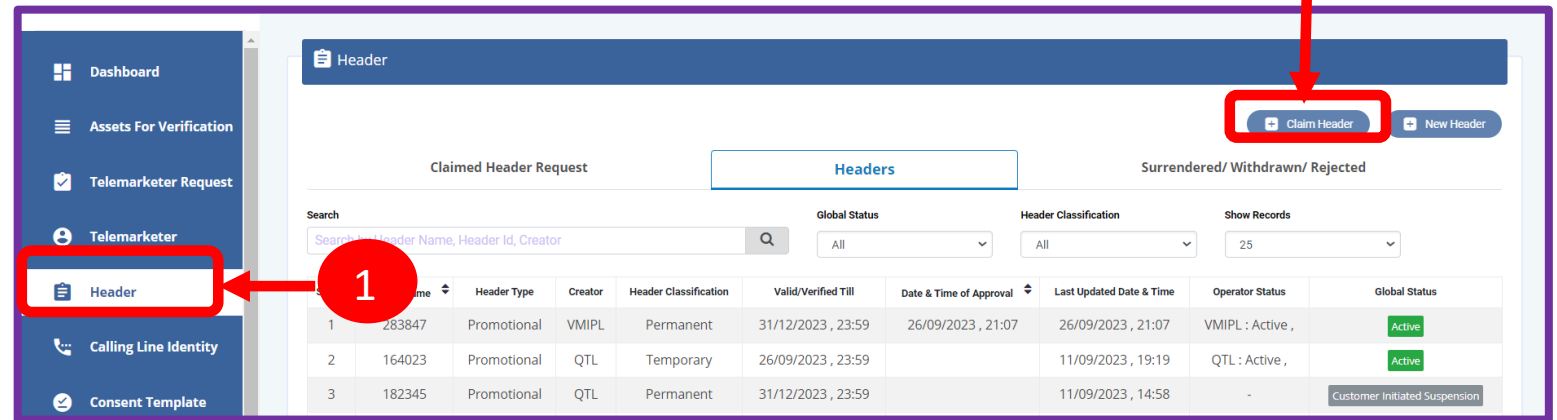
# CLAIM HEADER

# CLAIM HEADER – CLAIM INITIATION

1

Click **Header** on left navigation bar and go to the Header Page.

2



The screenshot displays the 'Header' management interface. On the left, a navigation menu includes 'Dashboard', 'Assets For Verification', 'Telemarketer Request', 'Telemarketer', 'Header', 'Calling Line Identity', and 'Consent Template'. The 'Header' menu item is highlighted with a red box and an arrow labeled '1'. The main content area shows a 'Header' title bar with 'Claim Header' and 'New Header' buttons. The 'Claim Header' button is highlighted with a red box and an arrow labeled '2'. Below the buttons, there are filters for 'Global Status' (All), 'Header Classification' (All), and 'Show Records' (25). A table lists header records with columns: S.No, Header Id, Header Name, Header Type, Creator, Header Classification, Valid/Verified Till, Date & Time of Approval, Last Updated Date & Time, Operator Status, and Global Status.

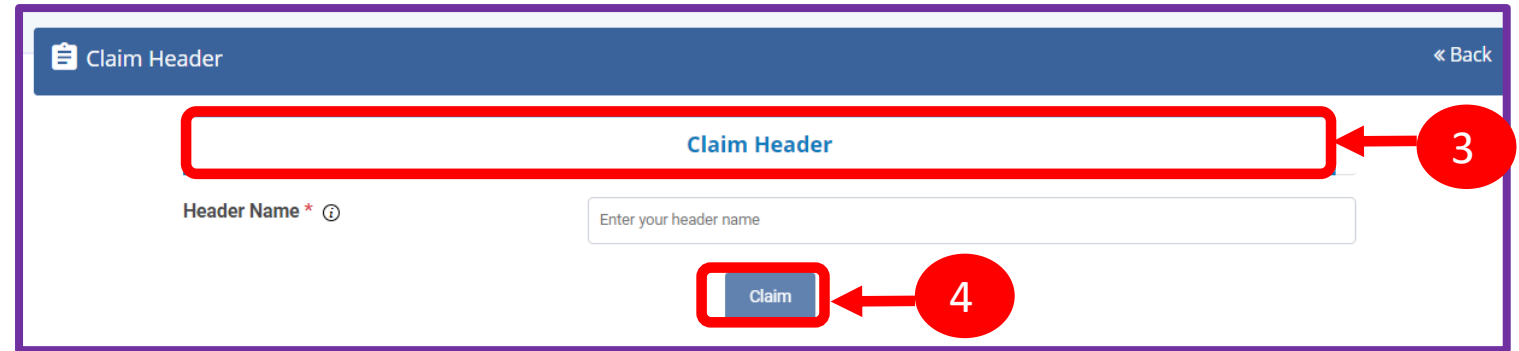
| S.No | Header Id | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Operator Status   | Global Status                 |
|------|-----------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|-------------------|-------------------------------|
| 1    | 283847    |             | Promotional | VM IPL  | Permanent             | 31/12/2023, 23:59   | 26/09/2023, 21:07       | 26/09/2023, 21:07        | VM IPL : Active , | Active                        |
| 2    | 164023    |             | Promotional | QTL     | Temporary             | 26/09/2023, 23:59   |                         | 11/09/2023, 19:19        | QTL : Active ,    | Active                        |
| 3    | 182345    |             | Promotional | QTL     | Permanent             | 31/12/2023, 23:59   |                         | 11/09/2023, 14:58        | -                 | Customer Initiated Suspension |

2

Click **Claim Header** to go to Header claim request page

# CLAIM HEADER – REQUEST SUBMISSION

**3** Type the Header that needs to be claimed in the **Header Name** section



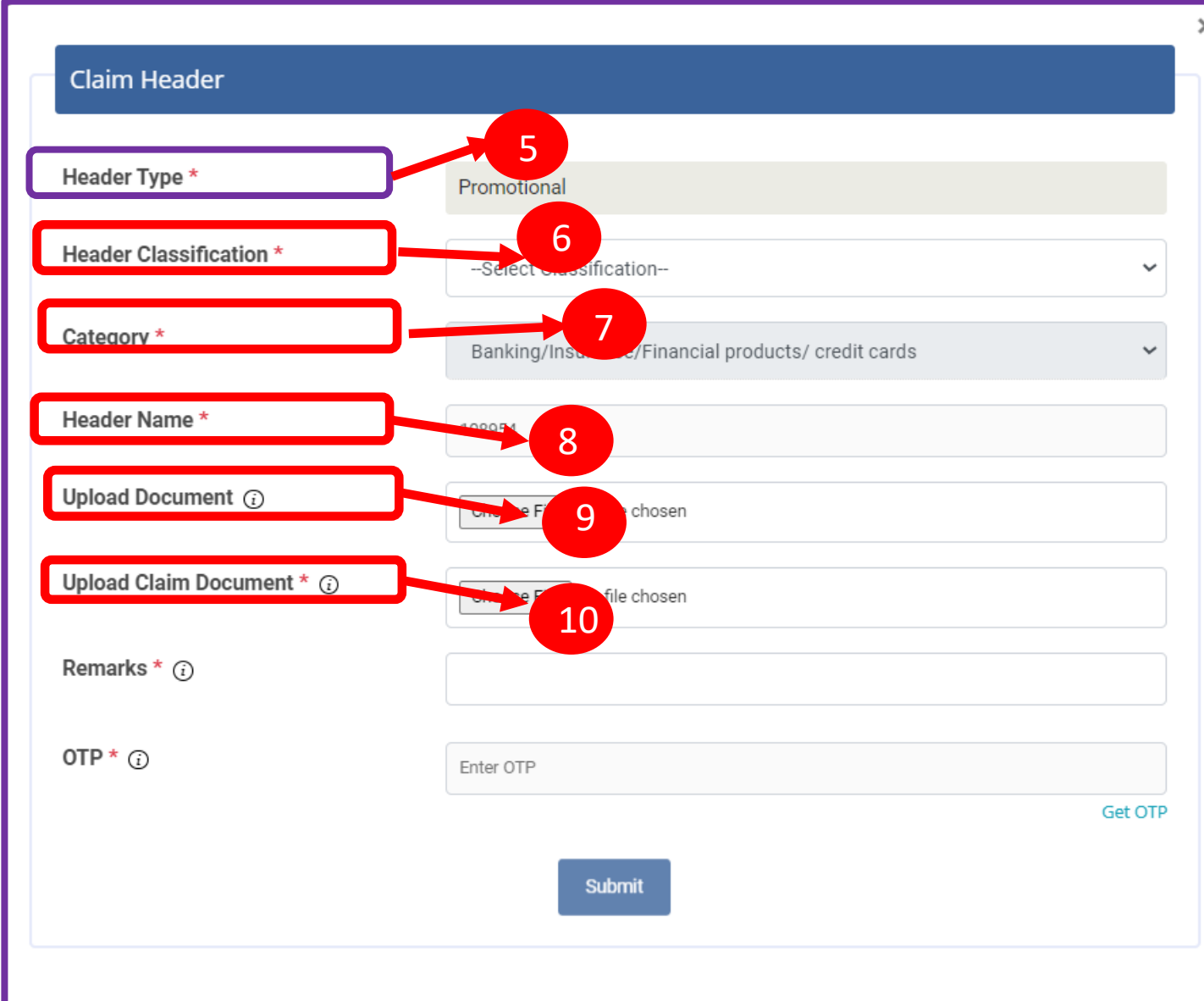
The screenshot shows a mobile application interface for submitting a claim header. At the top, there is a blue header bar with a clipboard icon, the text "Claim Header", and a "« Back" button. Below this, a red circle with the number "3" points to a large, empty text input field labeled "Claim Header". Underneath this field, the text "Header Name \* ⓘ" is displayed. To the right of this text is a smaller input field with the placeholder text "Enter your header name". Below the smaller input field, a blue button labeled "Claim" is highlighted with a red circle and the number "4".

**4** Click **Claim** button , a claim form will appear.

# CLAIM HEADER – FILL CLAIM FORM

Claim Form will contain details related to claimed Header

- 5** **Header Type** will be auto fetched in the Claim Form.
- 6** **Header Classification (Temporary & permanent)** will be auto-fetched in the Claim Form.
- 7** **Category** also will be auto fetched but it is editable if the Header Type is "Others"..
- 8** **Header Name** will also appear as per the input given in the initially.
- 9** In the **Upload Document** section, upload the relevant document related to Header
- 10** In the **Upload Claim Document** section, upload the relevant document proving the Entity ownership of the Header.



The screenshot shows a web form titled "Claim Header" with the following fields and callouts:

- 5** Header Type \* (Dropdown menu showing "Promotional")
- 6** Header Classification \* (Dropdown menu showing "--Select Classification--")
- 7** Category \* (Dropdown menu showing "Banking/Insurance/Financial products/ credit cards")
- 8** Header Name \* (Text input field with "100051" entered)
- 9** Upload Document (File upload field showing "Choose File" and "No file chosen")
- 10** Upload Claim Document \* (File upload field showing "Choose File" and "No file chosen")
- Remarks \* (Text input field)
- OTP \* (Text input field with "Enter OTP" placeholder and a "Get OTP" link)
- Submit (Blue button)

# CLAIM HEADER – REMARKS/OTP/ SUBMISSION OF CLAIM

**11** Fill the **Remarks/Reason** to claim the Header.

**12** Click **Get OTP** and you will receive the password on the authorized person's mobile number. Type the OTP in the space provided

**13** Press **Submit** button to send the request to Operator.

Claim Header

**Header Type \*** Promotional

**Header Classification \*** --Select Classification--

**Category \*** Banking/Insurance/Financial products/ credit cards

**Header Name \*** 108954

**Upload Document** ⓘ Choose File No file chosen

**Upload Claim Document \*** ⓘ Choose File No file chosen

**Remarks \* ⓘ** ← **11**

**OTP \* ⓘ** Enter OTP

Submit

Get OTP

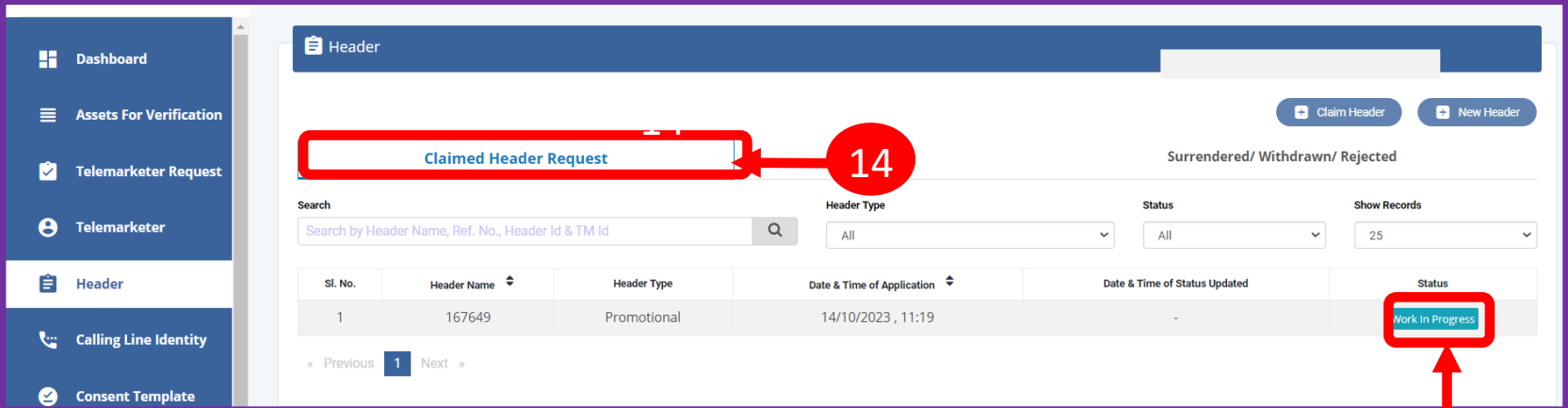
# CLAIM HEADER – REQUEST STATUS

14

All the Claimed Headers will be visible in the “**Claimed Header Request**”.

15

Claimed Header request will be in **Work In progress** status subject to approval from the Operator. Once the Operator approves and the claim process gets complete, the status of the claimed headers will turn to **Active**.



The screenshot shows the 'Header' management page. On the left is a navigation menu with options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header, Calling Line Identity, and Consent Template. The main content area has a 'Header' title and buttons for 'Claim Header' and 'New Header'. Below this is a search bar and filters for 'Header Type' (All), 'Status' (All), and 'Show Records' (25). A table displays the following data:

| Sl. No. | Header Name | Header Type | Date & Time of Application | Date & Time of Status Updated | Status           |
|---------|-------------|-------------|----------------------------|-------------------------------|------------------|
| 1       | 167649      | Promotional | 14/10/2023 , 11:19         | -                             | Work In Progress |

Navigation controls at the bottom of the table include 'Previous', '1', and 'Next'.

15

# HEADER – SURRENDER



# HEADER SURRENDER – INITIATION

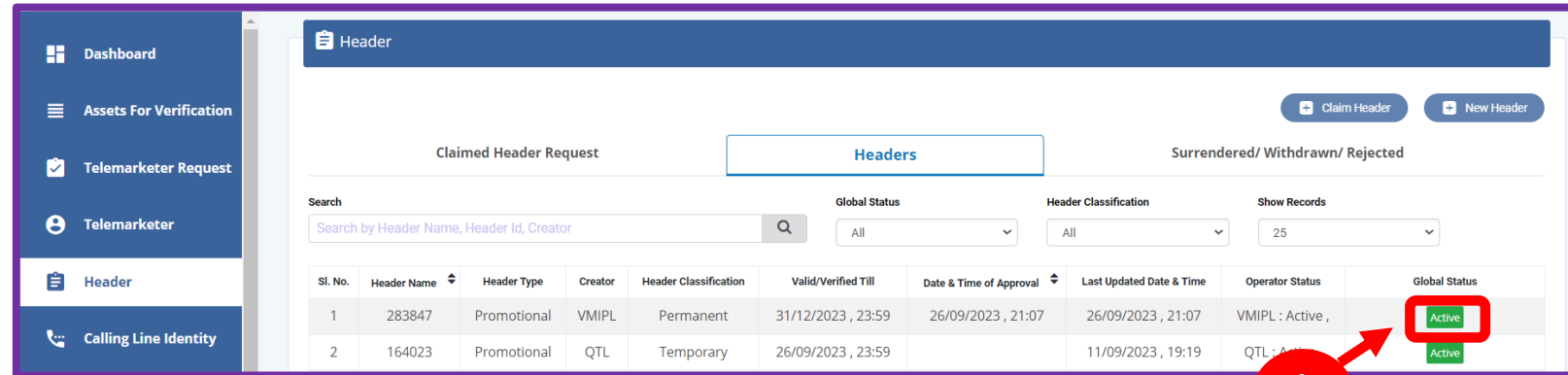
If the Entity does not want to send commercial communication with a particular header. Then they can surrender the same. Please follow the below mentioned process.

1

Click **Active** to surrender the header.

2

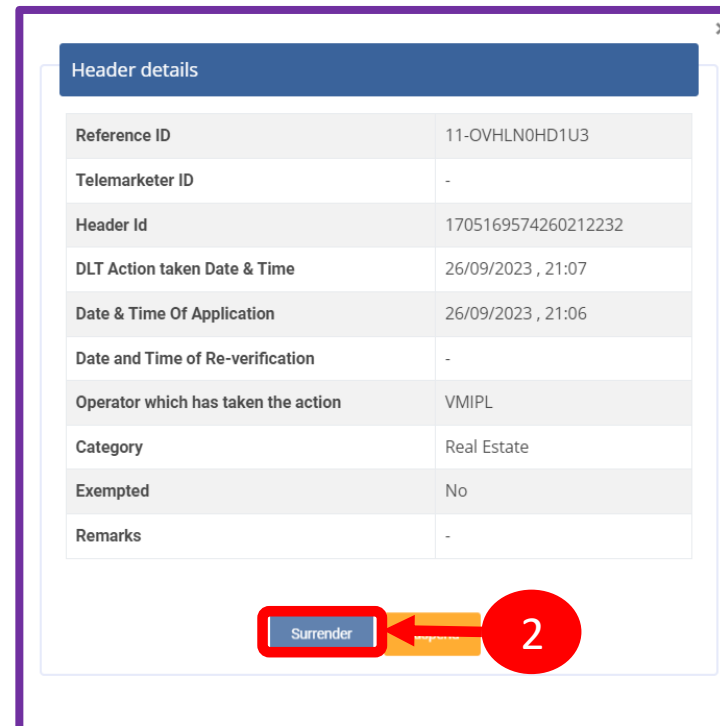
Click **Surrender** and confirm that you want to surrender your header.



Header management interface showing a table of headers. The 'Active' button for the first header is highlighted with a red box and a red circle containing the number 1.

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Operator Status  | Global Status |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|------------------|---------------|
| 1       | 283847      | Promotional | VM IPL  | Permanent             | 31/12/2023, 23:59   | 26/09/2023, 21:07       | 26/09/2023, 21:07        | VM IPL : Active, | Active        |
| 2       | 164023      | Promotional | QTL     | Temporary             | 26/09/2023, 23:59   |                         | 11/09/2023, 19:19        | QTL : Active,    | Active        |

1



Header details modal window showing the following information:

|                                     |                     |
|-------------------------------------|---------------------|
| Reference ID                        | 11-OVHLN0HD1U3      |
| Telemarketer ID                     | -                   |
| Header Id                           | 1705169574260212232 |
| DLT Action taken Date & Time        | 26/09/2023, 21:07   |
| Date & Time Of Application          | 26/09/2023, 21:06   |
| Date and Time of Re-verification    | -                   |
| Operator which has taken the action | VM IPL              |
| Category                            | Real Estate         |
| Exempted                            | No                  |
| Remarks                             | -                   |

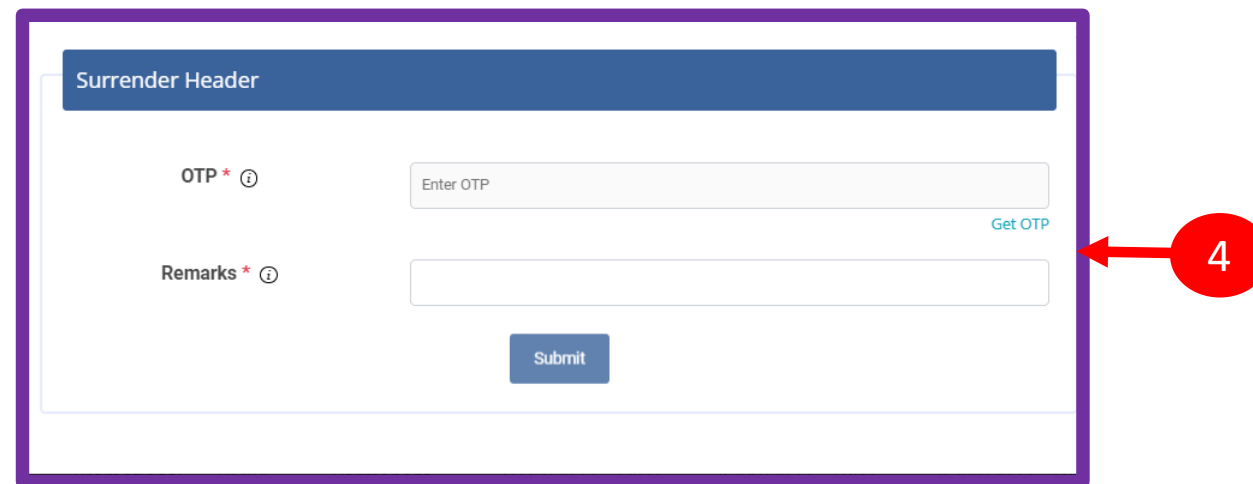
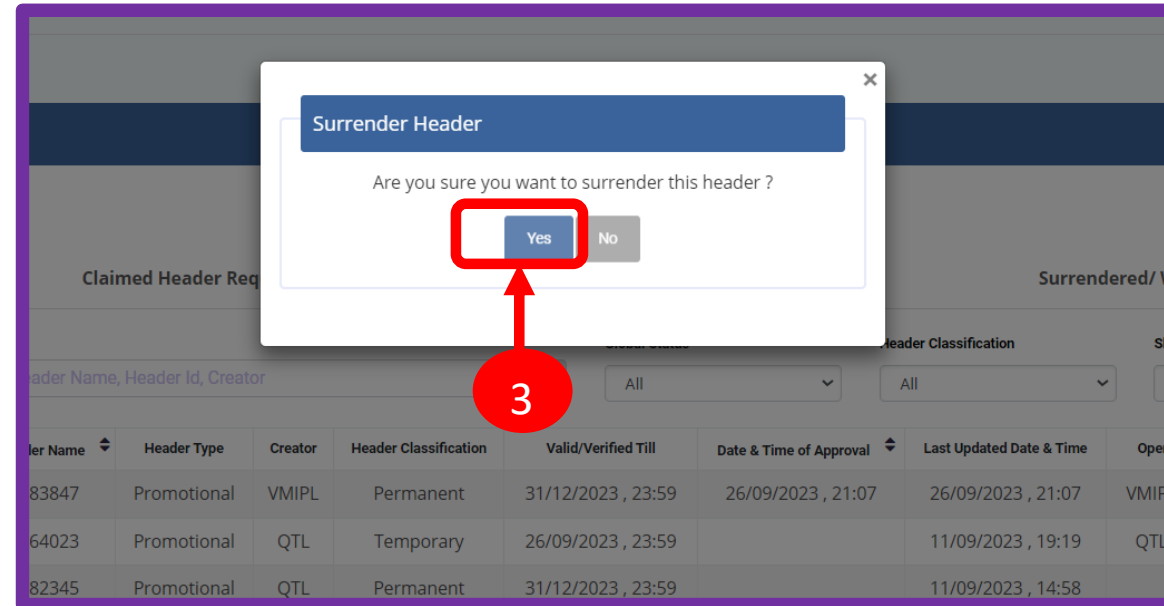
The 'Surrender' button is highlighted with a red box and a red circle containing the number 2.

2

# HEADER SURRENDER – OTP / CONFIRMATION

**3** A Pop-up will appear to confirm the Surrender process, Press **YES** button to confirm.

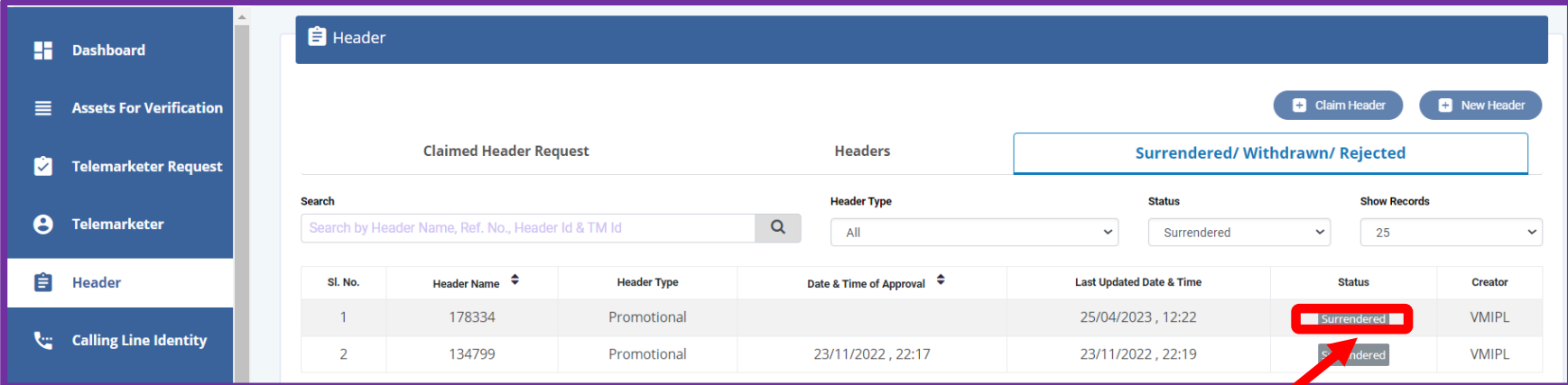
**4** Once you confirm the surrender of the header then a pop-up will appear for authentication. Share the **OTP** that you receive on your registered mobile number. Also provide the reason for Surrender in the Remarks section.



## HEADER SURRENDER - STATUS

5

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



The screenshot shows the 'Header' management interface. The left sidebar contains navigation options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header (selected), and Calling Line Identity. The main content area is titled 'Header' and features a 'Surrendered/Withdrawn/Rejected' filter. Below the filter is a search bar and dropdown menus for 'Header Type' (All), 'Status' (Surrendered), and 'Show Records' (25). A table displays the following data:

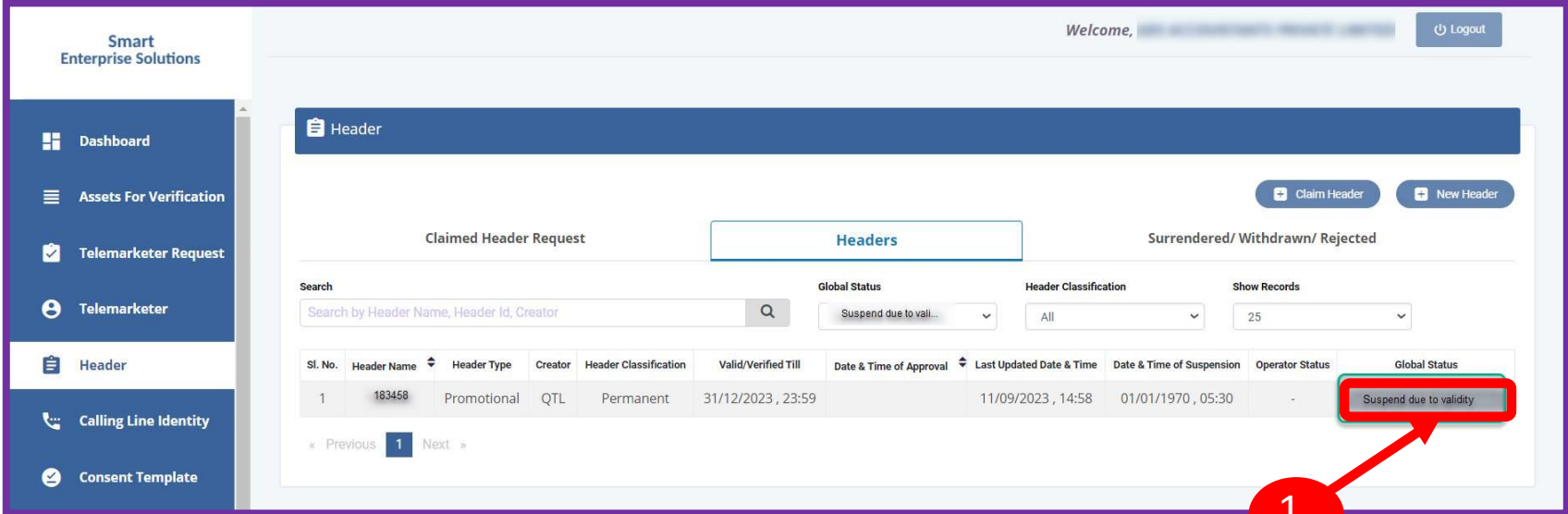
| Sl. No. | Header Name | Header Type | Date & Time of Approval | Last Updated Date & Time | Status      | Creator |
|---------|-------------|-------------|-------------------------|--------------------------|-------------|---------|
| 1       | 178334      | Promotional |                         | 25/04/2023 , 12:22       | Surrendered | VMIPL   |
| 2       | 134799      | Promotional | 23/11/2022 , 22:17      | 23/11/2022 , 22:19       | Surrendered | VMIPL   |

5

# HEADER – SUSPEND

## HEADER SUSPENDED DUE TO VALIDITY.

**1** IF the Validity of Temporary Header got expired OR Not verified the permanent Header. The Header will get Suspended.



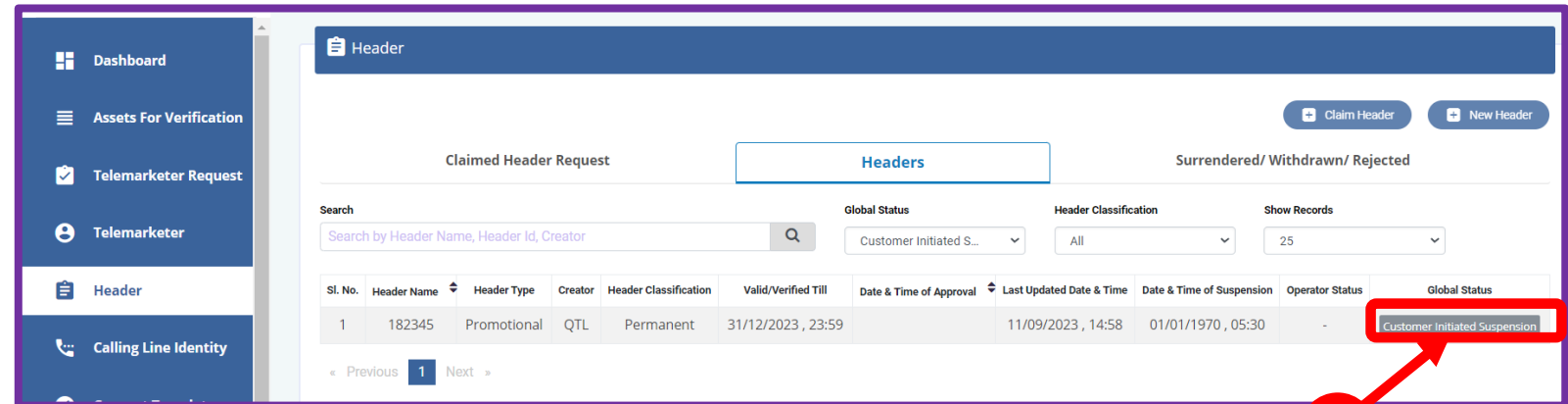
The screenshot shows the 'Header' management page in the 'Smart Enterprise Solutions' system. The page includes a sidebar with navigation options like 'Dashboard', 'Assets For Verification', 'Telemarketer Request', 'Telemarketer', 'Header', 'Calling Line Identity', and 'Consent Template'. The main content area displays a table of headers under the 'Headers' tab. The table has columns for 'Sl. No.', 'Header Name', 'Header Type', 'Creator', 'Header Classification', 'Valid/Verified Till', 'Date & Time of Approval', 'Last Updated Date & Time', 'Date & Time of Suspension', 'Operator Status', and 'Global Status'. A red box highlights the 'Global Status' column for the first row, which contains the text 'Suspend due to validity'. A red arrow points from a red circle with the number '1' to this highlighted status.

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Date & Time of Suspension | Operator Status | Global Status           |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|---------------------------|-----------------|-------------------------|
| 1       | 183458      | Promotional | QTL     | Permanent             | 31/12/2023, 23:59   |                         | 11/09/2023, 14:58        | 01/01/1970, 05:30         | -               | Suspend due to validity |

# HEADER SUSPENDED DUE TO CUSTOMER-INITIATED SUSPENSION

2

Entity can also Suspend their Header if not required anymore.



The screenshot shows the 'Header' management interface. The left sidebar contains navigation options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, Header (selected), and Calling Line Identity. The main content area is titled 'Header' and includes buttons for 'Claim Header' and 'New Header'. Below these are tabs for 'Claimed Header Request', 'Headers' (selected), and 'Surrendered/ Withdrawn/ Rejected'. A search bar is present with the text 'Search by Header Name, Header Id, Creator'. There are also filters for 'Global Status' (set to 'Customer Initiated S...'), 'Header Classification' (set to 'All'), and 'Show Records' (set to '25').

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Date & Time of Suspension | Operator Status | Global Status                 |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|---------------------------|-----------------|-------------------------------|
| 1       | 182345      | Promotional | QTL     | Permanent             | 31/12/2023 , 23:59  |                         | 11/09/2023 , 14:58       | 01/01/1970 , 05:30        | -               | Customer Initiated Suspension |

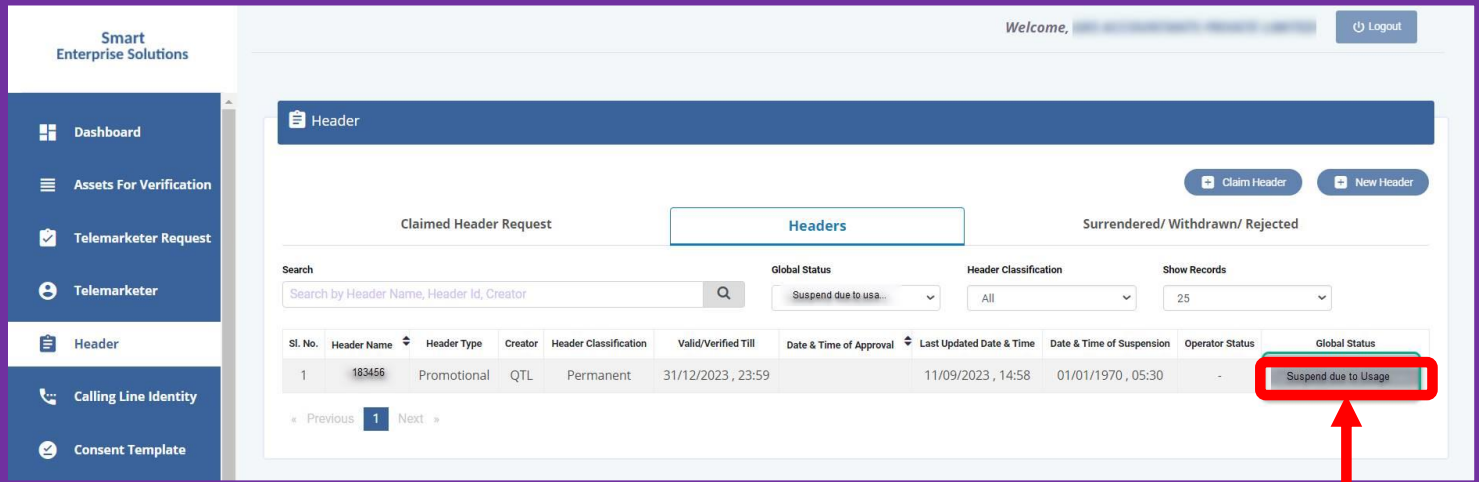
Navigation: « Previous 1 Next »

2

## HEADER SUSPENDED DUE USAGE

3

If any Header not been used in last 30 days.  
The Header will get suspended.



Smart Enterprise Solutions

Welcome, [User Name] [Logout](#)

Header

Claim Header New Header

Claimed Header Request Headers Surrendered/Withdrawn/Rejected

Search: Search by Header Name, Header Id, Creator

Global Status: Suspend due to usa... Header Classification: All Show Records: 25

| Sl. No. | Header Name | Header Type | Creator | Header Classification | Valid/Verified Till | Date & Time of Approval | Last Updated Date & Time | Date & Time of Suspension | Operator Status | Global Status        |
|---------|-------------|-------------|---------|-----------------------|---------------------|-------------------------|--------------------------|---------------------------|-----------------|----------------------|
| 1       | 183456      | Promotional | QTL     | Permanent             | 31/12/2023, 23:59   | 11/09/2023, 14:58       | 01/01/1970, 05:30        | -                         | -               | Suspend due to Usage |

« Previous 1 Next »

3

Thank You !