





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.

- The Entity must enter the required Chain Name to ensure proper identification of the chain.
- 5 Click on "Submit Button". The request will be submitted to TM for acceptance & defining its role as TM aggregator or TM Delivery.

	≡	Assets For Verification	1	GƏ PE	-TM Chain									
	2	Telemarketer Request			Pending	PE-TM Chain		Registe	ered PE-TM	Chain		Rejected/Blacklisted PE-T	M Chain	
	8	Telemarketer		Search Search	by TM ID		Q	Show Records	~	Status	~	-2	🛨 New	Request
1-	Ð	PE-TM Chain		SI. No.	Rf No.	TM ID	TM Name	Chain ID	Chain Name	Approver Role	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
-		CTA Whitelisting		1	15-P2TM2MV5CKI	1702172916485455948	TM2	1715580860223058042	-	TM-A	24/10/2024 , 10:59	24/10/2024 , 11:00	Chain In-process	0

Create PE-TM 0	Chain		« Back
3 Teleman	keter Id* ①	1702172916384128960 View Details	
	Telemarketer Name Telemarketer Id	TM1 1702172916384128960	
4→	Chain Name* Upload Document (Enter Chain Name Choose File No file chosen	
	5-	Submit Request	



Pending request at TM

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	U	

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.

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On the TM 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".

On the TM panel Click on Pending for approval.

	Dashboard		∎ PE-TI	M Chain										
Ê	Entities			Pendir	ng PE-TI	M Chain		F	egistered P	E-TM Chain		Reje	ected/Blacklisted PE	-TM Chain
≡	PE-TM Chain	s	Search Search	by TM/Entity	ld		Q	Show Record	ls	Status	ding at TM	~		
ت	СЦ		SI.	Refrence	Chain	Requestee	Requestee	Requestee	Approver	Approver	Document	Date & Time of	Date & Time of last	
٣	CLI Allocation		No.	Number	ID	ld	Name	Role	ID	Name	Uploaded	Request	Updated	Chain Status





TM Rejected the pending request

TM can reject the request by clicking on the Reject button.

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

Pe	nding PE-TM Chain		Regis	stered PE-TM Chain	10		Rejected	/Blacklisted	PE-TM C	hain	
Search			Show Record	s Status							
Search by TM/	Entity Id	Q	25	✓ Reie	cted	~					
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	Rejected By	Remarks
347931169042	1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916384128960	TM1	-	24/10/2024 , 11:06	24/10/2024 , 11:07	Reject	ТМ	test



Pending Request at TM and Multiple chain requests by TM

- 11 TM has to select his role (TM-A/TM-D) and click on the Accept button.
- ¹² TM can send multiple/bulk chain requests to the other TMs, by entering the next TM ID and clicking on the Next button.
- 13
- Click on the "Submit" button.

PE-IM Binding Request	Details				
Reference Number		15-P2T	M2MU5MQ8		
Entity/TM Id		13011653	356164217542	IMITED	
Date & Time Of Request		24/10/2	2024 , 10:31	INTED	
Choose Your Role As	Telema	rketer Aggregato	or O Tele	emarketer Delive	ry
Choose Your Next TM For A Bindin	ng Request	ubsequent Chai	in/s with TMs	Uploaded Document	Action
1 02168000122976612 Telemarketer Name		Z beiver ld Re			
1 02168000122976612 Telemarketer Name 2ND Upload Document ① Choose File No file chosen Next		zeiverid Re	Oops!	uest	
1 02168000122976612 Telemarketer Name 2ND Upload Document ① Choose File No file chosen Next Doose Your Next TM For A Binding Rev	equest	No	Oops! • TM Binding Requ	Lest	
1 02168000122976612 Telemarketer Name 2ND Upload Document ① Choose File No file chosen Next Dose Your Next TM For A Binding Real Statement of the second statement of th	equest	of subsequent Chain/s	Oops! o TM Binding Requ	Jest	
1 02168000122976612 Telemarketer Name 2ND Upload Document ① Choose File No file chosen Next Next Dosse Your Next TM For A Binding Re lemarketer Id* ① inter Telemarketer Id	equest Sr. No.	of subsequent Chain/s Receiver Id	Oops! TM Binding Requ s with TMs Receiver Name	uest Uploaded Document	Action
1 02168000122976612 Telemarketer Name 2ND Upload Document ① Choose File No file chosen Next Dose Your Next TM For A Binding Re lemarketer Id* ① inter Telemarketer Id	equest Creation Sr. No.	of subsequent Chain/s Receiver Id	Oops! TM Binding Requires the second	uest Uploaded Document	Action



Pending at TM

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

Request Approve	ed and sent to next TM	l for further approval		×			Welcome	, TM1	ථ Logout
nain									
Pending PE-TM Chai	n	Registered	PE-TM Cha	ain	Re	jected/Blac	cklisted PE-T	M Chain	
		Show Records	Sta	atus					
//Entity Id	Q	25	~	A11 ~					
Chain ID	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time	Date & Time of last Updated	Chain
1715564195727932969	1301165356164217	7542 GKS ACCOUNTANTS PRIVATE	PE	1702172916384128960	TM1	-	14	24/10/202	Pendin At Next
- - 1	Request Approve	Chain ID Requestee Id 1301165356164217	Request Approved and sent to next TM for further approval ain rending PE-TM Chain Registered Show Records VEntity Id Chain ID Chain ID Requestee Id IS01165356164217542 GKS ACCOUNTANTS	Request Approved and sent to next TM for further approval	Request Approved and sent to next TM for further approval X ain Yending PE-TM Chain Show Records Status 2/5 All Chain ID Requestee Id Requestee Id Requestee Nam Requestee Id Chain ID 1301165356164217542 GKS ACCOUNTANTS PE 1702172916384128960	Request Approved and sent to next TM for further approval X ain Yending PE-TM Chain Registered PE-TM Chain Show Records Status 25 All Chain ID Requestee Id Requestee Name Requestee Approver ID Approver ID 715564195727932969 1301165356164217542 GKS PE 1702172916384128960 TM1	Request Approved and sent to next TM for further approval X ain Tending PE-TM Chain Registered PE-TM Chain Rejected/Bia Show Records Status 2/5 X Chain ID Requestee Id Requestee Name Requestee Approver ID Approver ID Approver ID Approver ID Document Chain ID Requestee Id Requestee Name Requestee Approver ID Name Uploaded 715564195727932969 1301165356164217542 GKS PE 1702172916384128960 TM1 -	Welcome Welcome Welcome Welcome Welcome Welcome Welcome Show Records Status Ventity Id O All Chain ID Requestee Id Requestee Name Requestee Approver ID Approver Document Date & Time T15564195727932969 1301165356164217542 ACCOUNTANTS PE 1702172916384128960 TM1 - 14	Welcome, 7M1 Welcome, 7M1 Welcome, 7M1 Show Records Status Yending PE-TM Chain Rejected/Blacklisted PE-TM Chain Show Records Status Ventity Id One well Date & Time of Tast Chain ID Requestee Id Requestee Name Rever ID Approver ID Approver ID Date & Time of Tast 715564195727932969 1301185356164217542 GKS ACCOUNTANTS PE 1702172916384128960 TM1 - 24/10/2022



Status View at Entity Panel

- ¹⁵ Submitted Request will be visible under the Pending PE-TM Chain section with the status "Pending at TM.
 - 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.

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



≣	Assets For Verification	PE-TM Chain ح								
Ż	Telemarketer Request	Pendin	J PE-TM Chain	F	Registered PE-TM	Chain		Rejected/Blacklisted PE-	TM Chain	
8	Telemarketer	Search Search by TM ID		C 25	•	Status	~	Download Report	+ New R	tequest
Θ	PE-TM Chain	Sl. No. Rf No.	TM ID TM	/ Name Chain ID	Chain Name	Approver Role	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
	CTA Whitelisting	1 15-P2TM2MV5CK	1702172916485455948	TM2 17155808602230	- 58042	TM-A	24/10/2024 , 10:59	16	Chain In-process	0



Limit exceeds more than 2 TM-A

¹⁷ If more than two TMs choose to select the role of TM Aggregator (TM-A), a pop-up will appear prompting them to accept or cancel the acknowledgment of exceeding the TM Aggregator limit of two.

Reference Number	15-P2TM2MU5MQ8
Entity/TM Id	1301165356164217542
Entity/TM Name	GKS ACCOUNTANTS PRIVATE LIMITED
Choose 17	Telemarketer Aggregator Telemarketer Delivery



Click on the accept button. Then TM has to enter the next Telemarketer ID. And follow the same process to complete the chain.

	"I am opting myself as TM-Aggregator function and requesting for next TM in the chain for processing, this will exceed the recommended limit of 2 TM Aggregators, I/We acknowledge this recommendation and despite that would like to proceed with the PE- TM chain binding involving more than 2 TMs to meet business needs."
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Request approve by TM as TM-D

¹⁹ If the TM selects its role as TM delivery (TM-D). The chain will be completed here.

Reference Number	15-P2TM2MU7KE1
Entity/TM Id	1702172916384128960
Entity/TM Name	TM1
ate & Time Of Request	24/10/2024 , 10:32
Choose Your Role As	 Telemarketer Aggregator Telemarketer Delivery

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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.

g PE-TM Chain			Registered	PE-TM Ch	ain	Re	ejected/Blac	cklisted PE-T	'M Chain	
		Show Reco	rds	St	atus					
ld	Q	25		~	All 🗸					
Chain ID	Reques	tee ld	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chain Statur
715564195727932969	1702172916	384128960	TM1	TM-A	1702172916485455948	TM2	-	20	24/10/2024 , 10:33	Pendir At Entity
	g PE-TM Chain d Chain ID 715564195727932969	g PE-TM Chain d Q Chain ID Reques 715564195727932969 1702172916	g PE-TM Chain Show Reco d Q 25 Chain ID Requestee Id 715564195727932969 1702172916384128960	g PE-TM Chain Registered Show Records d Q 25 Chain ID Requestee Id Requestee 715564195727932969 1702172916384128960 TM1	g PE-TM Chain Registered PE-TM Chain Show Records St d 25 V Chain ID Requestee Id Requestee Mame Role 715564195727932969 1702172916384128960 TM1 TM-A	Registered PE-TM Chain Show Records Status d 25 All Chain ID Requestee Id Requestee Requestee Requestee Id Requestee Requestee Requestee T15564195727932969 1702172916384128960 TM1 TM-A 1702172916485455948	Registered PE-TM Chain Registered PE-TM Chain Show Records Status 25 Status Chain ID Requestee Id Requestee Approver ID Approver ID T15564195727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2	Registered PE-TM Chain Rejected/Black Show Records Status All Ocument Chain ID Requestee Id Requestee Requestee Approver ID Approver ID Chain ID Requestee Id Requestee Requestee Approver ID Approver ID Document 715564195727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2 -	Registered PE-TM Chain Rejected/Blacklisted PE-T Show Records Status 25 All Chain ID Requestee Id Requestee Requestee Approver ID Approver ID Approver ID Document of Request Date & Time of Request 715564195727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2 - 20	Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain Show Records Status 2 All Chain ID Requestee Id Requestee Requestee Approver ID Approver ID Date & Time of Request Date & Time of Isst 715564195727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2 - 20 24/10/2022



Request approval/rejection by Entity

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Entity can view the complete chain by clicking on the "chain flow" icon next to the "Pending Final Approval" status.

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

	Pending	PE-TM Chain		Register	ed PE-TM C	hain	F	Rejected/Blacklisted PE-	TM Chain	
earch				Show Records		Status		Download Report	+ New	Request
Search	rch by TM ID			25	✓ All		~			
SI. No.	Rf No.	TM ID	TM Name	Chain ID	Chain Name	Approver Role	Date & Time of Request	Last Updated	Status	Chain F
1	15-LFNM39UBVH8	1702172916384128960	TM1	1715474328963968605	Test only	TM-D	09/11/2024 , 12:54	21 , 12:55	Pending final approval	0
2	15-LFNM39UAHDU	1302172845078861490	TESTING ONLY	1715473679742830203	testing	TM-A	09/11/2024 , 12:53	09/11/2024 , 12:53	Pending at TM	
3	15-P2TM2MV5CKI	1702172916485455948	TM2	1715580860223058042		TM-A	24/10/2024 , 10:59	24/10/2024 , 11:00	Chain In-process	۲





Entity Registered and Rejected/Blacklisted PE-TM Chain Section

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



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Entity Registered and Rejected/Blacklisted PE-TM Chain Section

- TM-D can also extend the chain under the "Registered PE-TM Chain" section as "Active". Click on the view icon.
- When TM-D initiates a chain extension, must select their role as TM-A.
 - Select role as TM-A and click on "Accept'.

Note: When TM-D extends the chain, TM-D must select his role as TM-A (TM Aggregator) and then send the extension request to the next TM for further processing.





Chain Extension Request in PE-TM Chain Section

- Enter next TM ID, view details and click on "Next" button.
- ²⁹ TM can send chain request to multiple TMs by "Add More TM" button.
- ³⁰ Enter TM ID, view the details and click on "Submit Extend" button.

Note: Any chain can contain maximum of 6 participants including 4 TM-A, 1 TM-D, and 1 PE. TM-D can extend the chain only after get "activated".

Telemarketer Id* @		ation	of subsequent	Chain/s with TMs		
1702168000122976612	28	. No.	Receiver Id	Receiver Name	Uploaded Document	Action
Telemarketer Name						
2ND						
Upload Document (7)				Oops	1	
Choose File No file chosen				No TM Binding F	Request	
Next						

Choose Your Next TM For A Bindin	g Request				
Telemarketer Id* (i)	Creation	of subsequent Chain/s	s with TMs		
Enter Telemarketer Id	Sr. No.	Receiver Id	Receiver Name	Uploaded Document	Action
Add More TM	1	1702170245448599512	TMSSS	-	Î
	29		Submit Extend		



Chain flow on Entity Panel

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

ew s	workflow details:*	ТМ	Role	Date & Time of	Date & Time of Last	Status	Doc
No.		Name		Request	Updated	- and	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	-



Chain Blacklisted by Entity

- The Entity can blacklist an active chain 32 by clicking on the Blacklist button under the action column.
 - The Blacklisted request will go under **Rejected/Blacklisted** PE-TM Chain section with chain status as "Blacklisted" on the entity panel.
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On the TM panel, the blacklisted chain will be visible under the rejected/blacklisted PE-TM chain section with no action button. And the "Blacklisted By" column will indicate that the chain was blacklisted by PE.

Note: Only the Entity/TM that blacklisted the chain will have the option to whitelist it.



∎	Assets For Verification	GD PE-TR	M Chain								
Ż	Telemarketer Request		Pending P	E-TM Chain		Registered Pl	E-TM Chain		Rejected/Blac	klisted PE-TM Chain	
•	Telemarketer	Search				Show Records	:	Status		Do	ownload Report
0	leieniai ketei	Search by	TM ID		Q	25	~	Blacklisted	~		
Ð	PE-TM Chain	SI, No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Chain ID	Chain Name	Date & Time of Request	Date & Time of Last Updated	Statue Blacklisted By	Action Remarks
		1 15-6	64SM2OK8EB5	1702172916709316350	TM3	1715606662918748504	-	25/10/2024 . 1	2024 . 15:34	Blacklinfed	test
■	CTA Whitelisting	« Previou	us 1 Next	2					33		





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USER MANUAL

Chain Blacklisted by TM

- The TM can blacklist an active chain by clicking on the Blacklist button under the action column.
- The Blacklisted request will go under Rejected/Blacklisted PE-TM Chain section with chain status as "Blacklisted" on the TM panel.
- On the Entity panel, the blacklisted chain will be visible under the rejected/blacklisted PE-TM chain section with no action button. And the "Blacklisted By" column will indicate that the chain was blacklisted by the TM.

Note: Only the Entity/TM that blacklisted the chain will have the option to whitelist it.

Per	nding PE-TM Chain		F	Registered PE-TM C	hain			Rejected	/Blacklisted	PE-TM CI	hain	Rejected/Blacklisted PE-TM Chain					
Search Search by TM/E	Entity Id	Q	Show Re	cords V		Download Re	eport										
Chain ID	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Approver Role	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chain Status	Action	Ch: Flo					
606662918748504	1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916709316350	ТМЗ	TM-D	-	25/1	35 24	Active	Blacklist	⊘ Viev					



≡	Assets For Verification	© P	E-TM Chain								
2	Telemarketer Request		Pending F	PE-TM Chain		Registered P	E-TM Chain		Rejected/E	Blacklisted PE-TM Chain	
8	Telemarketer	Search	h by TM ID		Q	Show Records	~	Status Blacklisted	~	Do	wnload Report
Ð	PE-TM Chain	SI. No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Chain ID	Chain Name	Date & Time of R	Request Pate & Time of Last Upd	atad Statue Blacklisted By	Action Remarks
■	CTA Whitelisting	1 « Pre	15-64SM2OK8EB5 evious 1 Next	1702172916709316350 »	TM3	1715606662918748504		25/10/202	37	Etackinted TM	test
_											



Chain Whitelisted by Entity

- ³⁸ The Entity can Whitelist the blacklisted chain by clicking on the "Whitelist" button under the action column.
 - The Whitelisted chain will become active and visible under the registered PE-TM Chain section, with the chain status "Active" on the entity panel.
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When the Entity has whitelisted the chain, it will be visible under the registered section on the TM panel with the status "Active".

	Pending F	PE-TM Chain		Registered P	E-TM Chain		Rejected/Blac	klisted F	PE-TM Chair	I	
Search				Show Records	:	Status				ownload F	Report
Searc	h by TM ID		Q	25	~	Blacklisted	~				
SI. No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Chain ID	Chain Name	Date & Time of Reques	t Date & Time of Last Updated	Status	Blacklisted By	Action	Rema
1	15-64SM2OK8EB5	1702172916709316350	TM3	1715606662918748504	-	25/10/2024 , 15:28	25/10/2024 , 15:34	Blacklisted	тм		tes

≡	Assets For Verification	GO PE-	TM Chain					
2	Telemarketer Request		Pending PE	-TM Chain		Registered PE-TM	I Chain	Rejected/Blacklisted PE-TM Chain
Θ	Telemarketer	Search Search	by TM ID		Show R Q 25	tecords		Download Report
Ð	PE-TM Chain	SI. No.	Rf No.	TM Delivery ID	TM Delivery Name	Chain ID	Chain Name	Date & Time of Request Date & Time of Last Updated Status Action Chain Fig
	CTA Whitelisting	1 « Previ	15-P2TM2MU8M5G	1702172916485455948	TM2	1715564195727932969	-	24/10/2024 , 1 39 0/24 - 15-58 Addue 10 14 💿





Chain Whitelisted by TM

- ⁴¹ The TM can Whitelist a blacklisted chain by clicking on the "Whitelist" button under the action column.
 - The Whitelisted chain will become active and visible under the registered PE-TM Chain section, with the chain status "Active" on the TM panel.
 - When TM has whitelisted the chain, it will be visible under the registered section on the Entity panel with the status "Active".

							_						
	Pending P	E-TM Chain		Register	ed PE-TM C	Chain			Rejected/	Blackliste	d PE-TM C	hain	
S	earch			Show Records		Status							
	Search by TM/Entity Id		a	25	~	Blac	klisted	~		lownload Rep	ort		
									Date &				
								Dete 9	Time of				
	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Approver Role	Document Uploaded	Time of Request	last Updated	Chain Status	Blacklisted By	Action	Remarks



■	Assets For Verification	GD PE-TM Cha	in				
2	Telemarketer Request	Pe	nding PE-TM Chain		Registered PE-TM	l Chain	Rejected/Blacklisted PE-TM Chain
8	Telemarketer	Search Search by TM ID		Show F	tecords 🗸 🗸		Download Report
Ð	PE-TM Chain	SI. No. Rf M	io. TM Delivery ID	TM Delivery Name	Chain ID	Chain Name	Date & Time of RequestRate & Time of Last UpdatedRateActionChain Fi
∎	CTA Whitelisting	1 15-P2TM2 « Previous 1	Next »	TM2	1715564195727932969		24/10/2024 . 43.500 India Electro





Thank You !