



User Manual

VOICE CLI

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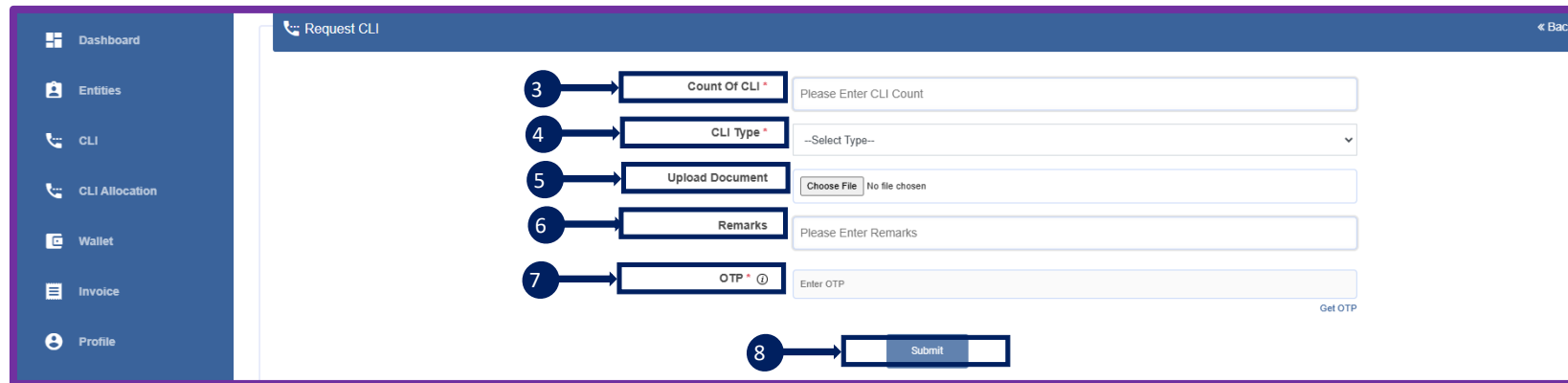
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VOICE CLI Registration (TM)

Who has opted for voice will only get the option to register

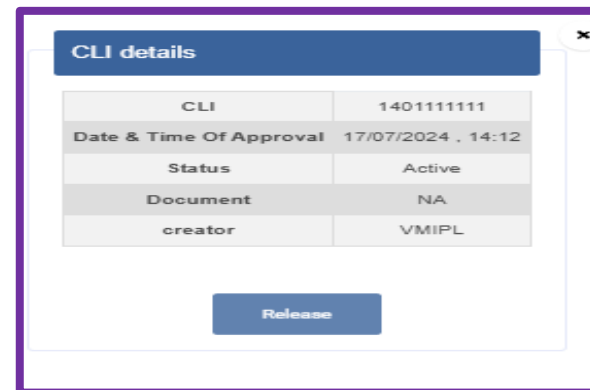
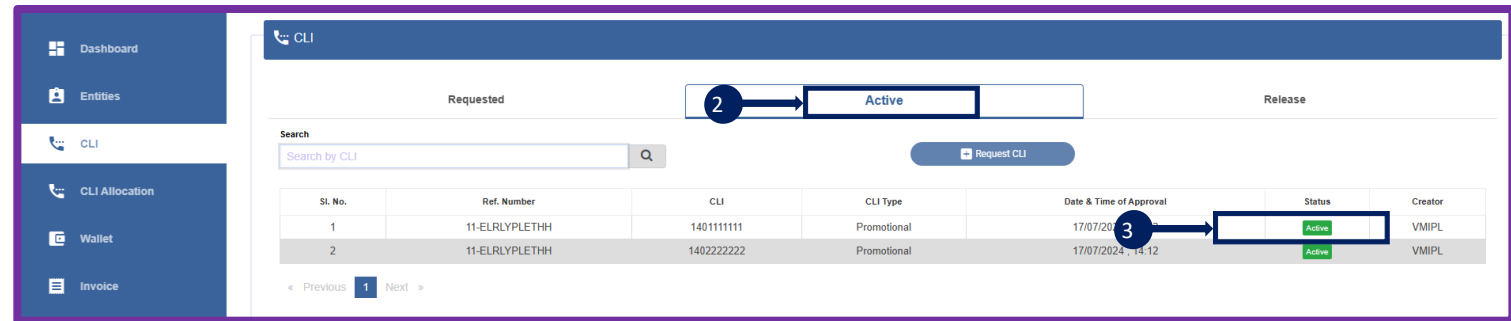
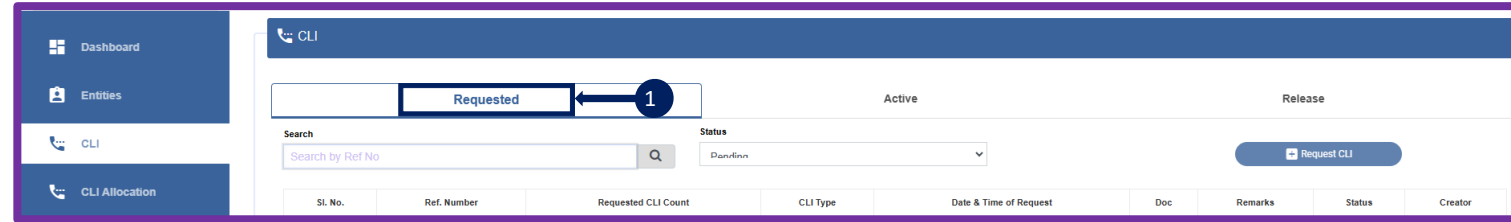
Voice CLI- Registration by TM

- 1 To create the Voice CLI-The Telemarketer has to go in CLI section
- 2 Click on Request CLI button
- 3 Mention the count of CLI required
- 4 Choose the CLI type, i.e. promotional for 140 series
- 5 Upload the document if any
- 6 Submit the Remarks
- 7 Submit the OTP through Get OTP Button
- 8 Submit the Request for Operator Approval



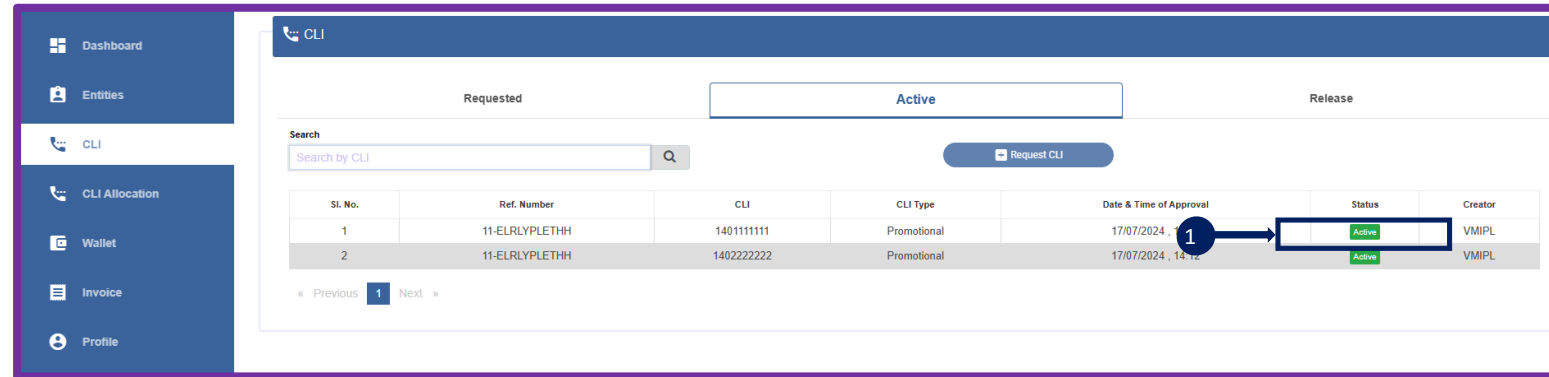
Visibility to TM- Post Submission

- 1 Once submitted it shall be visible under "Requested Tab" as Pending.
- 2 Once the Operator approves it, it will appear in the Active section with an Active status.
- 3 Under Active section individual series allotted to Telemarketer will be visible as status Active



CLI- Release

- 1 If the TM wants to release a CLI, they need to click on the Active status of that specific CLI.
- 2 Click on Release Button
- 3 Submit the Remarks and click on Yes Button
- 4 Click on Yes Button
- 5 Once done it will be visible under Release section



CLI

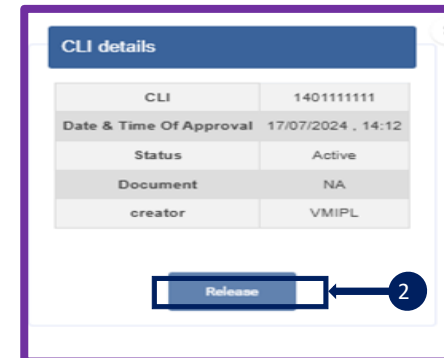
Requested Active Release

Search

Search by CLI

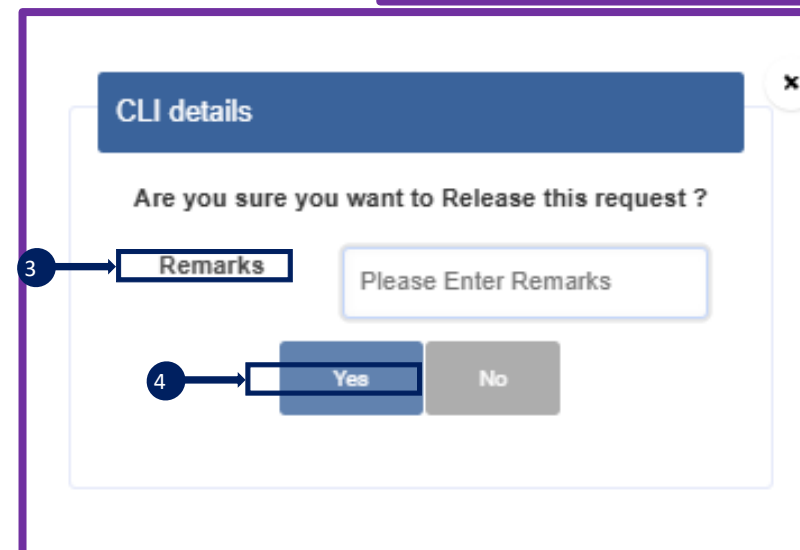
Sl. No.	Ref. Number	CLI	CLI Type	Date & Time of Approval	Status	Creator
1	11-ELRLYPLETHH	1401111111	Promotional	17/07/2024, 14:12	Active	VM IPL
2	11-ELRLYPLETHH	1402222222	Promotional	17/07/2024, 14:12	Active	VM IPL

< Previous 1 Next >



CLI details

CLI	1401111111
Date & Time Of Approval	17/07/2024, 14:12
Status	Active
Document	NA
creator	VM IPL



CLI details

Are you sure you want to Release this request ?

Remarks

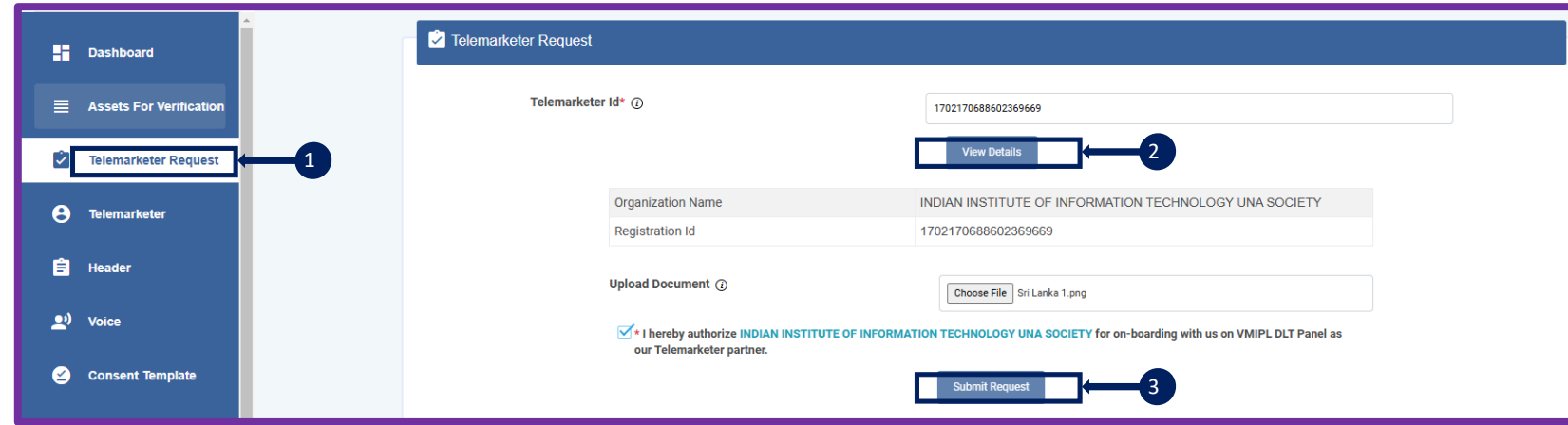
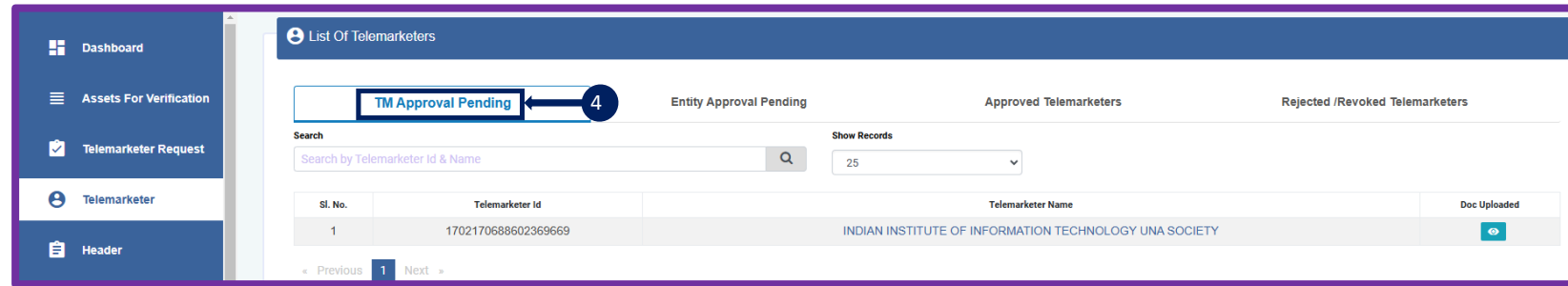
VOICE CLI PE – TM Binding

A process of binding Entity and Telemarketer

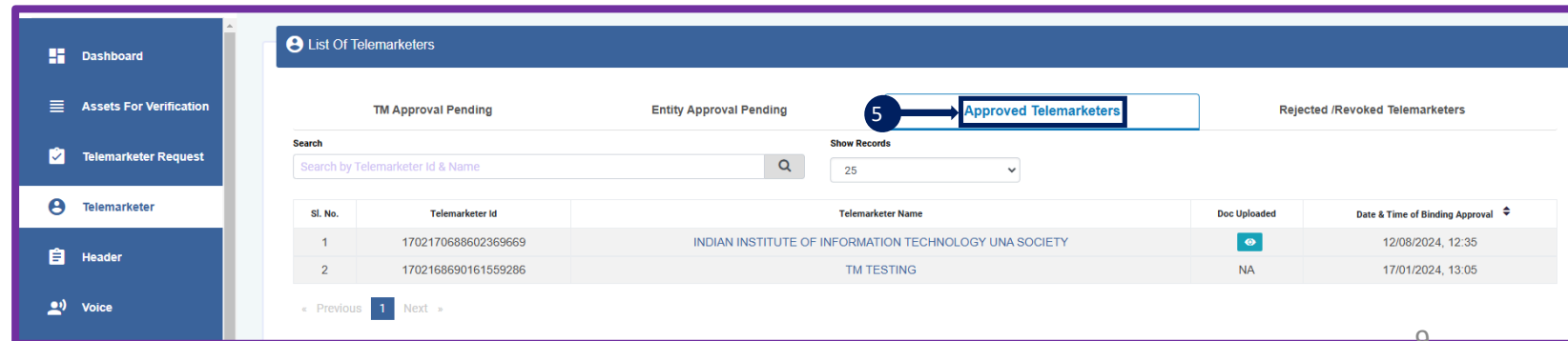
To Allocate the CLI to Entity, the respective TM and Entity should be binded

Request From Entity to TM

- 1 Entity has to go on the Telemarketer Request Section
- 2 Enter TM ID to auto fetch the details of that TM
- 3 Submit the binding request
- 4 Post submission of the binding request the request can be viewed under "TM Approval Pending Section"
- 5 Once Approved by the TM it can be viewed under the Approved Telemarketers Tab

Sl. No.	Telemarketer Id	Telemarketer Name	Doc Uploaded
1	1702170688602369669	INDIAN INSTITUTE OF INFORMATION TECHNOLOGY UNA SOCIETY	



Sl. No.	Telemarketer Id	Telemarketer Name	Doc Uploaded	Date & Time of Binding Approval
1	1702170688602369669	INDIAN INSTITUTE OF INFORMATION TECHNOLOGY UNA SOCIETY		12/08/2024, 12:35
2	1702168690161559286	TM TESTING	NA	17/01/2024, 13:05

Action By TM on Binding-Request Received from Entity

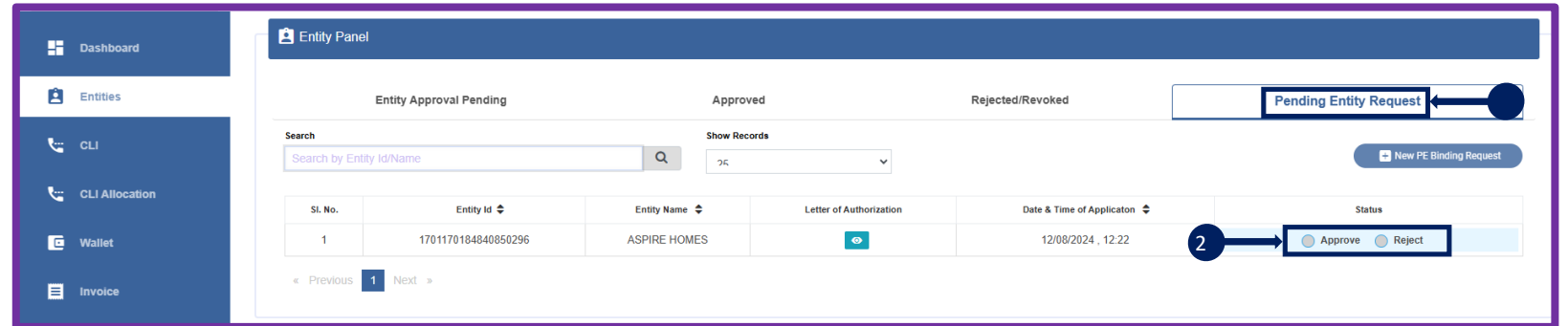
1 The Binding request received from the Entity will be visible under “Pending Entity Request” tab

2 Against each request Action button will be there to Approve or Reject the request

3 Once Approved it will be visible under Approved tab

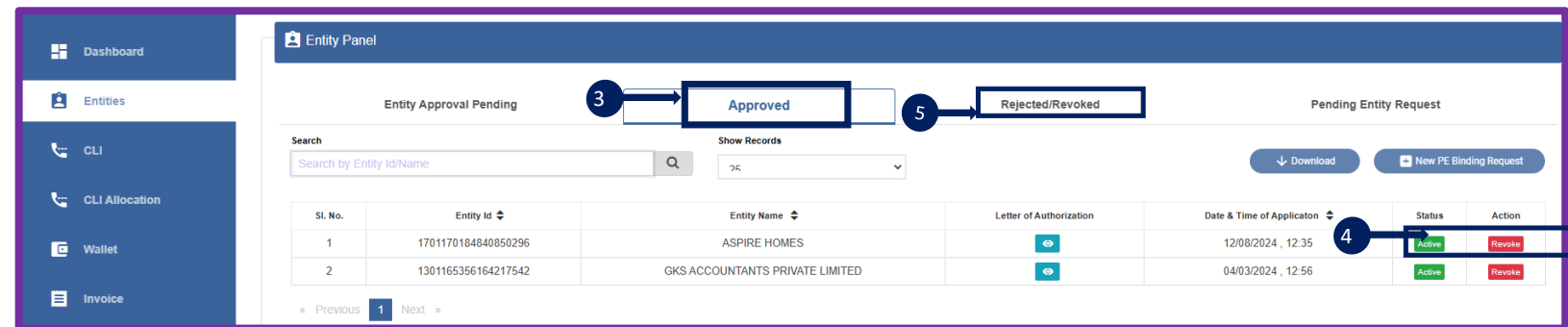
4 Against each Approved request Action button will be there to Revoke the Binding.

5 Once Revoked it will be visible under Rejected/Revoked section



The screenshot shows the 'Entity Panel' with tabs for 'Entity Approval Pending', 'Approved', and 'Rejected/Revoked'. The 'Pending Entity Request' tab is active. A search bar and 'Show Records' dropdown are visible. A table contains one entry for 'ASPIRE HOMES' with a date of '12/08/2024, 12:22'. An 'Approve' button is highlighted with a blue circle and arrow labeled '2'.

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status
1	1701170184840850296	ASPIRE HOMES		12/08/2024, 12:22	Approve Reject



The screenshot shows the 'Entity Panel' with tabs for 'Entity Approval Pending', 'Approved', and 'Rejected/Revoked'. The 'Approved' tab is active. A search bar and 'Show Records' dropdown are visible. A table contains two entries. The first entry for 'ASPIRE HOMES' has a date of '12/08/2024, 12:35' and an 'Action' column with 'Active' and 'Revoke' buttons. The 'Revoke' button is highlighted with a blue circle and arrow labeled '4'.

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status	Action
1	1701170184840850296	ASPIRE HOMES		12/08/2024, 12:35	Active	Revoke
2	1301165356164217542	GKS ACCOUNTANTS PRIVATE LIMITED		04/03/2024, 12:56	Active	Revoke

Request From TM to Entity

1 TM also has the option to send Binding request to Entity Click on “New PE Binding Request”

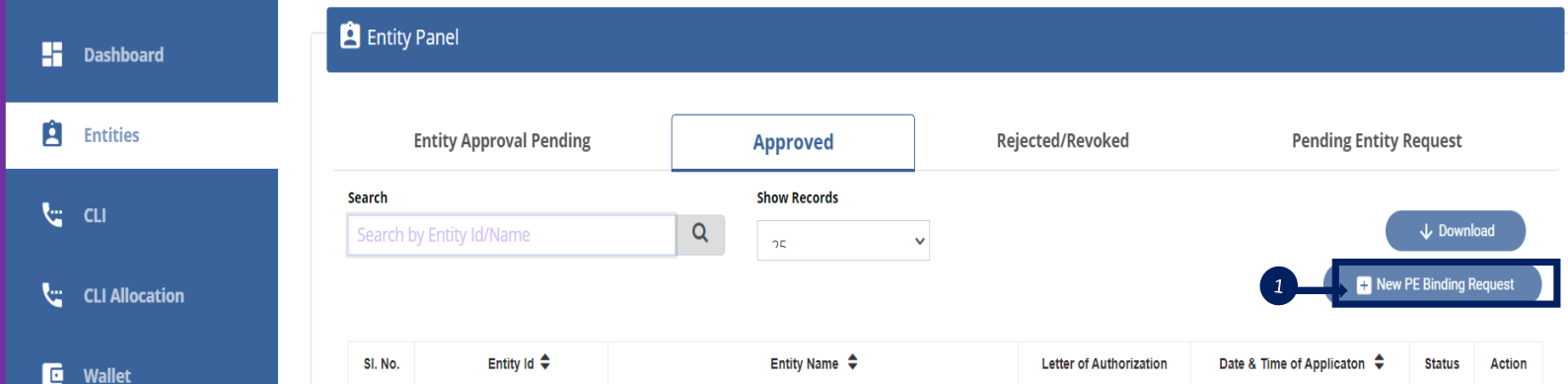
2 Enter Entity ID to fetch the details

3 Upload Letter of Authorization

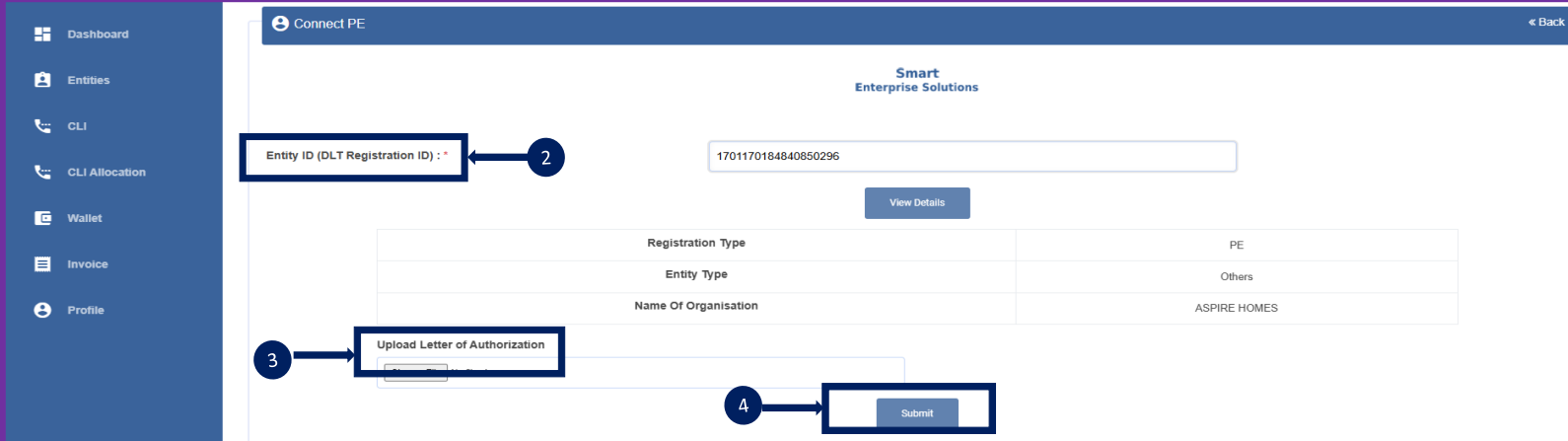
4 Submit the request

5 Once submitted it will be reflected under “Entity Approval pending Tab” as status pending

6 Post Entity’s approval, it will be visible under Approved section.



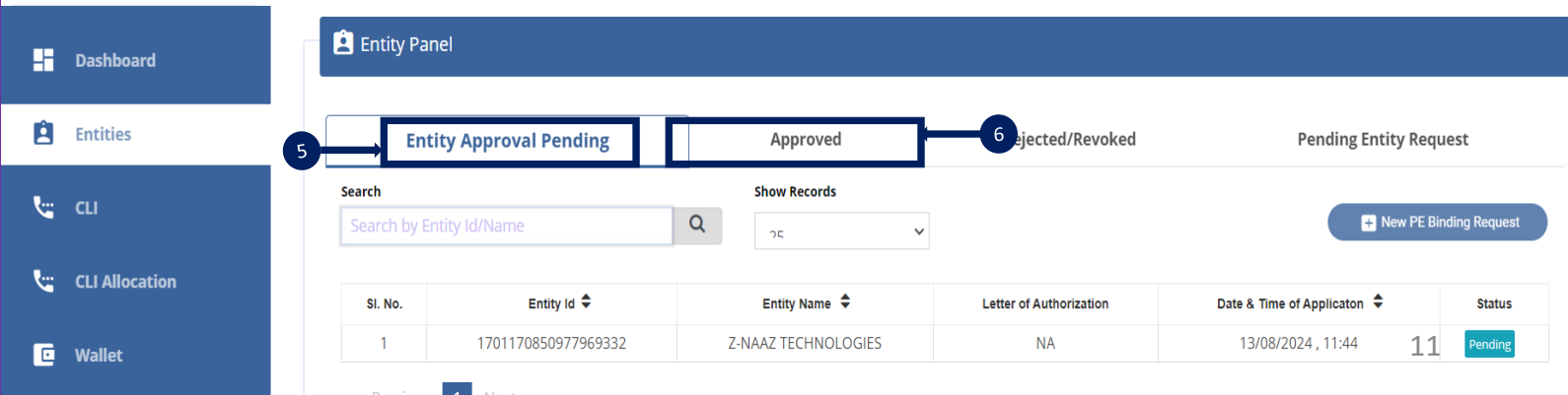
The screenshot shows the 'Entity Panel' interface. On the left is a navigation menu with 'Dashboard', 'Entities', 'CLI', 'CLI Allocation', and 'Wallet'. The main content area has tabs for 'Entity Approval Pending', 'Approved', 'Rejected/Revoked', and 'Pending Entity Request'. Below the tabs is a search bar with the placeholder 'Search by Entity Id/Name' and a 'Show Records' dropdown. A 'Download' button is in the top right. A red circle with the number '1' and an arrow points to the '+ New PE Binding Request' button.



The screenshot shows the 'Connect PE' form. At the top, it says 'Smart Enterprise Solutions'. There is a 'View Details' button. Below that is a table with the following data:

Registration Type	PE
Entity Type	Others
Name Of Organisation	ASPIRE HOMES

Below the table is an 'Upload Letter of Authorization' field and a 'Submit' button. Annotations include: a red circle '2' pointing to the 'Entity ID (DLT Registration ID) : *' field containing '1701170184840850296'; a red circle '3' pointing to the 'Upload Letter of Authorization' field; and a red circle '4' pointing to the 'Submit' button.



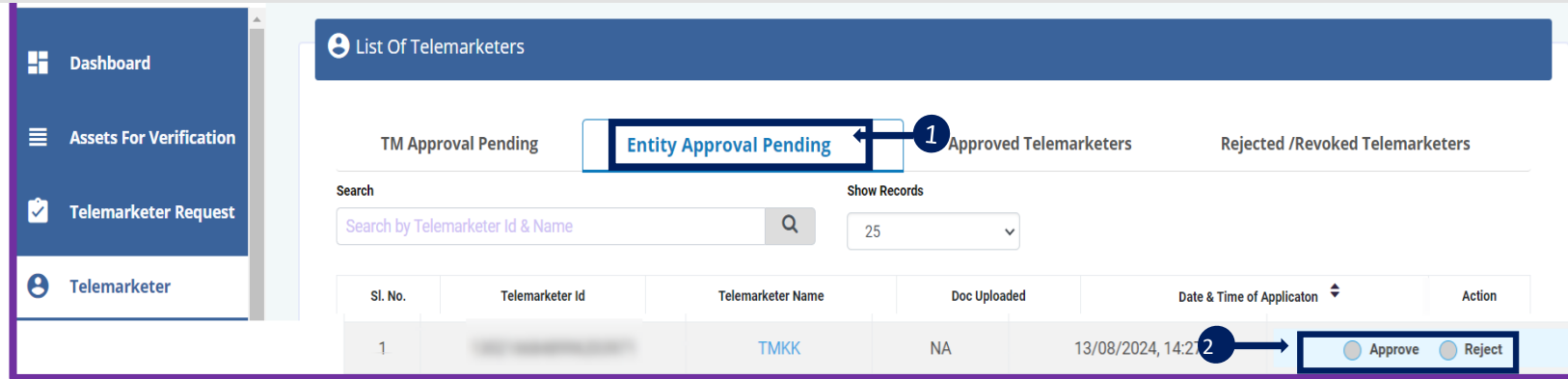
The screenshot shows the 'Entity Panel' interface with the 'Entity Approval Pending' tab selected. A table below shows the following data:

Sl. No.	Entity Id	Entity Name	Letter of Authorization	Date & Time of Application	Status
1	1701170850977969332	Z-NAAZ TECHNOLOGIES	NA	13/08/2024 , 11:44	11 Pending

Annotations include: a red circle '5' pointing to the 'Entity Approval Pending' tab; and a red circle '6' pointing to the 'Approved' tab.

Action By Entity on Binding-Request Received from TM

- 1 The Binding request received from the TM will be visible under “Entity Approval pending” tab
- 2 Against each request Action button will be there to Approve or Reject the request
- 3 Once Approved it will be visible under Approved tab
- 4 Against each Approved request Action button will be there to Revoke the Binding.
- 5 Once Revoked it will be visible under Rejected/Revoked section

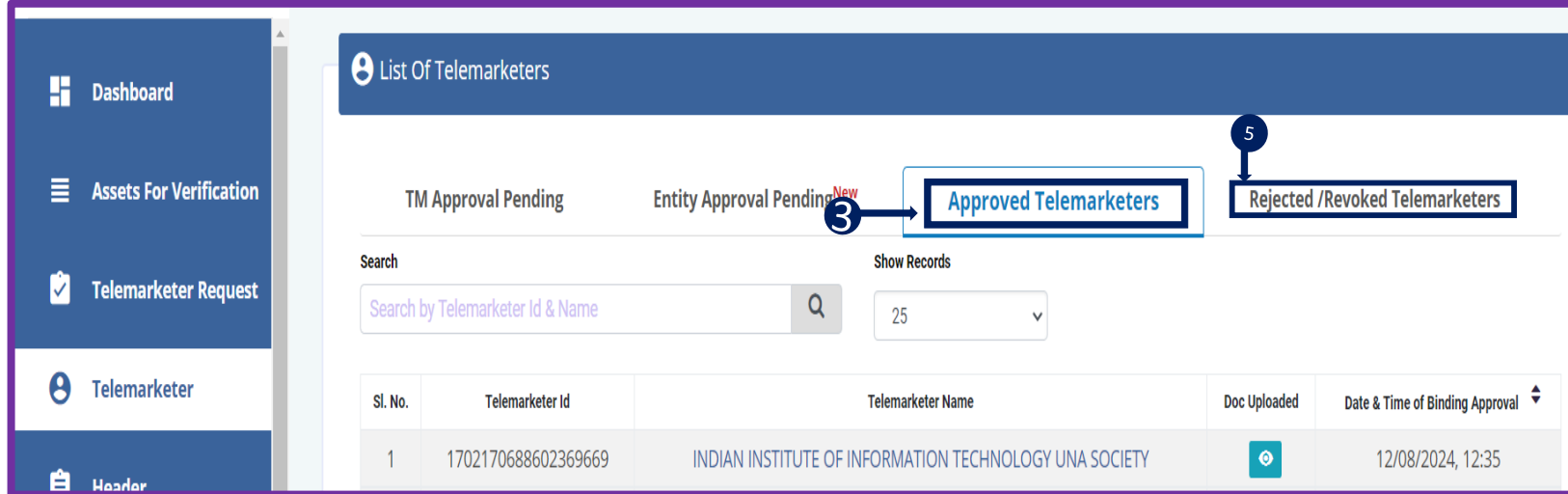


List Of Telemarketers

TM Approval Pending | **Entity Approval Pending** | Approved Telemarketers | Rejected /Revoked Telemarketers

Search: Search by Telemarketer Id & Name [] [Q] Show Records: 25 [v]

Sl. No.	Telemarketer Id	Telemarketer Name	Doc Uploaded	Date & Time of Application	Action
1	[REDACTED]	TMKK	NA	13/08/2024, 14:2	Approve Reject

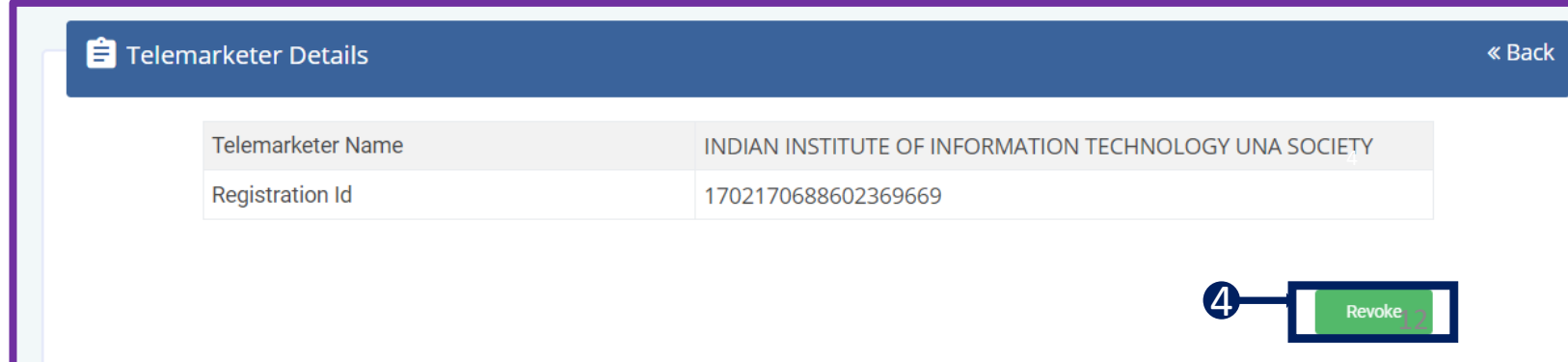


List Of Telemarketers

TM Approval Pending | Entity Approval Pending^{New} | **Approved Telemarketers** | Rejected /Revoked Telemarketers

Search: Search by Telemarketer Id & Name [] [Q] Show Records: 25 [v]

Sl. No.	Telemarketer Id	Telemarketer Name	Doc Uploaded	Date & Time of Binding Approval
1	1702170688602369669	INDIAN INSTITUTE OF INFORMATION TECHNOLOGY UNA SOCIETY	[Icon]	12/08/2024, 12:35



Telemarketer Details < Back

Telemarketer Name	INDIAN INSTITUTE OF INFORMATION TECHNOLOGY UNA SOCIETY
Registration Id	1702170688602369669

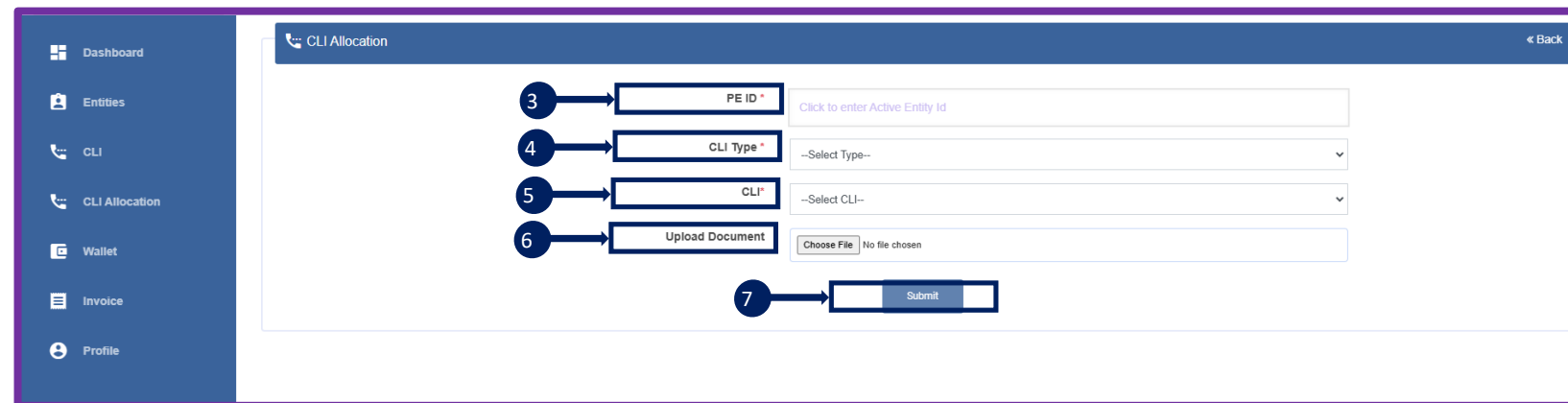
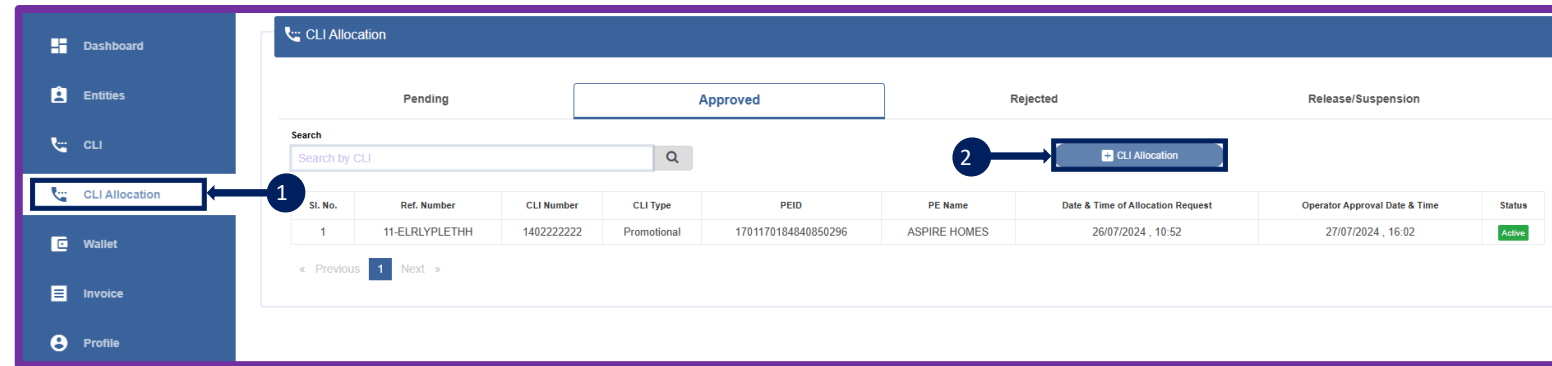
Revoke

VOICE CLI ALLOCATION

Once CLI Created it can be allocated to Entity which is bounded with respective Telemarketer and has chosen the Voice Option

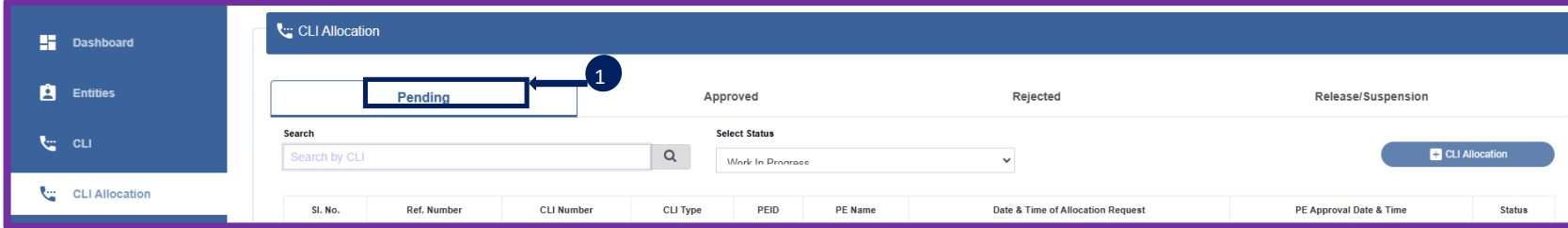
TM panel – CLI Allocation to Entity

- 1 To Allot the Voice CLI to PE -The TM has to go in CLI Allocation section
- 2 Click on Request CLI Allocation button
- 3 Select the PE ID to whom TM wants to allot the CLI
- 4 Select the CLI type, i.e. promotional & Transactional
- 5 Select the CLI
- 6 Upload Document if any
- 7 Submit the request for initiation

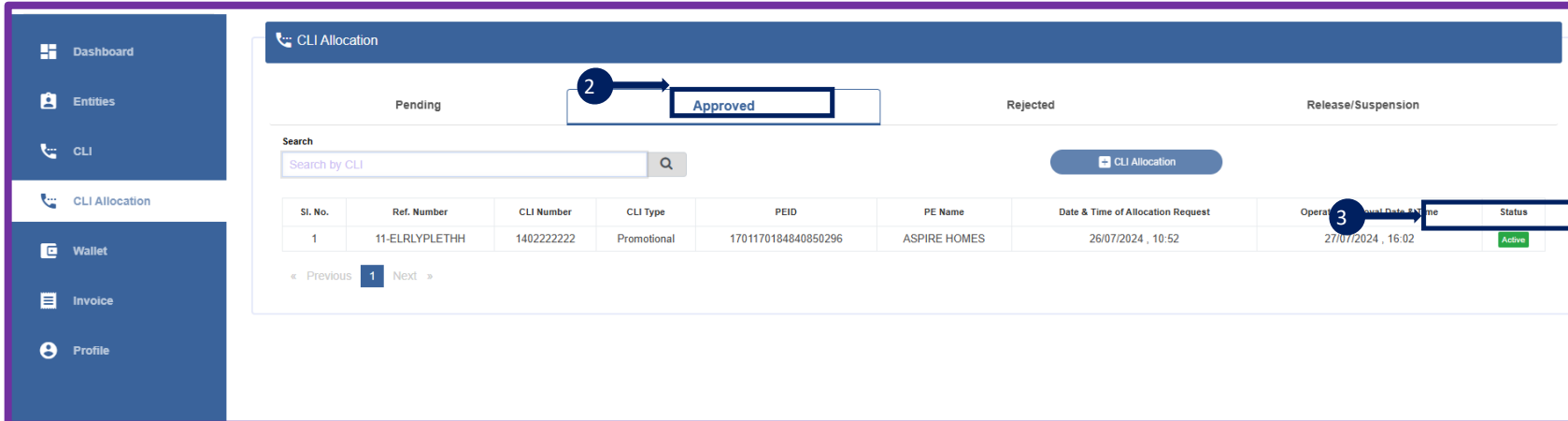


TM Panel Status – Post CLI Allocation

- 1 Click on pending section to view the pending requests
- 2 Click on Approved section to view all Active CLI allocation approved by the Entity & Operator
- 3 Click on Active status to view the detailed and Actions option e.g. Release & Suspension



The screenshot shows the 'CLI Allocation' interface. The left sidebar contains navigation options: Dashboard, Entities, CLI, and CLI Allocation. The main content area has a header 'CLI Allocation' and a navigation bar with tabs: Pending, Approved, Rejected, and Release/Suspension. The 'Pending' tab is selected and highlighted with a blue box and a circled '1'. Below the tabs is a search bar labeled 'Search by CLI' and a 'Select Status' dropdown menu. A table below shows columns for Si. No., Ref. Number, CLI Number, CLI Type, PEID, PE Name, Date & Time of Allocation Request, PE Approval Date & Time, and Status.

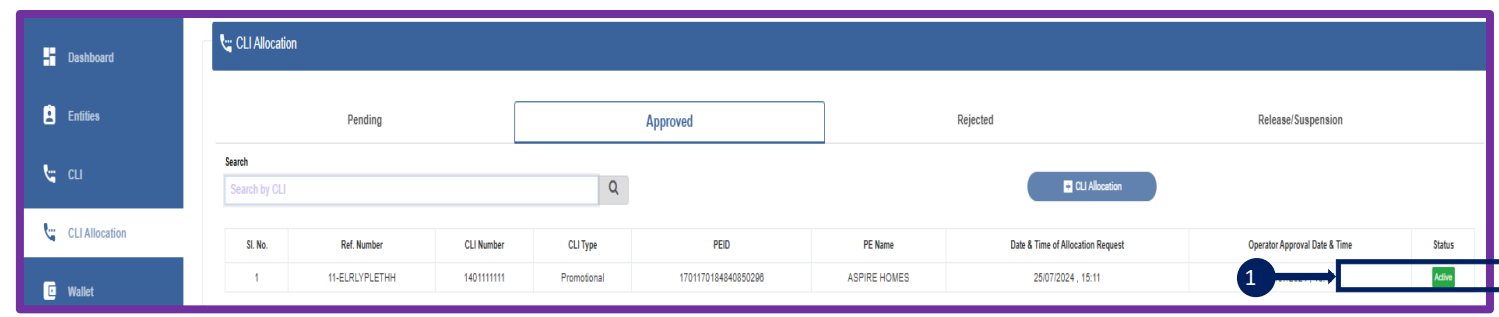


The screenshot shows the 'CLI Allocation' interface with the 'Approved' tab selected and highlighted with a blue box and a circled '2'. The table below shows one row of data. The 'Status' column for this row is highlighted with a blue box and a circled '3'. The table columns are: Si. No., Ref. Number, CLI Number, CLI Type, PEID, PE Name, Date & Time of Allocation Request, Operator, Approval Date & Time, and Status.

Si. No.	Ref. Number	CLI Number	CLI Type	PEID	PE Name	Date & Time of Allocation Request	Operator	Approval Date & Time	Status
1	11-ELRLYPLETHH	1402222222	Promotional	1701170184840850296	ASPIRE HOMES	26/07/2024 , 10:52		27/07/2024 , 16:02	Active

TM Panel – Release of CLI

- 1 Click on Active status to take action against any CLI Allocated to Entity
- 2 Click on Release Button to release the CLI
- 3 Option to fill any remarks
- 4 Click on yes button to proceed
- 5 Once released it will be visible under Release/Suspension section
- 6 Select the status to view status wise CLI

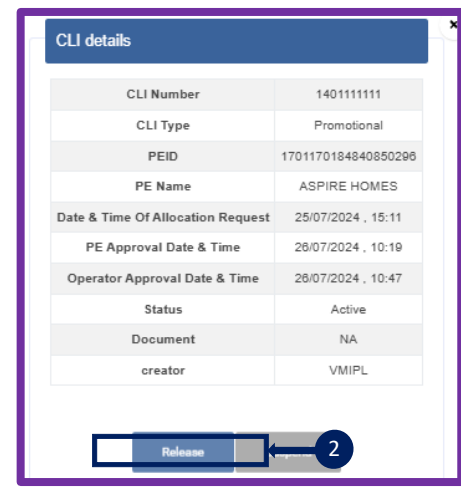


CLI Allocation

Pending Approved Rejected Release/Suspension

Search Search by CLI Q CLI Allocation

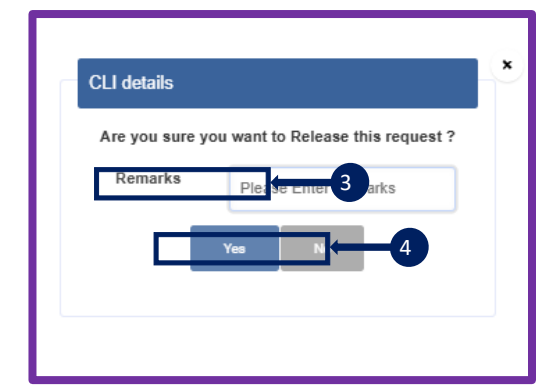
Sl. No.	Ref. Number	CLI Number	CLI Type	PEID	PE Name	Date & Time of Allocation Request	Operator Approval Date & Time	Status
1	11-ELRLYPLETHH	1401111111	Promotional	1701170184840850296	ASPIRE HOMES	25/07/2024, 15:11		Active



CLI details

CLI Number	1401111111
CLI Type	Promotional
PEID	1701170184840850296
PE Name	ASPIRE HOMES
Date & Time Of Allocation Request	25/07/2024, 15:11
PE Approval Date & Time	26/07/2024, 10:19
Operator Approval Date & Time	26/07/2024, 10:47
Status	Active
Document	NA
creator	VMIPL

Release

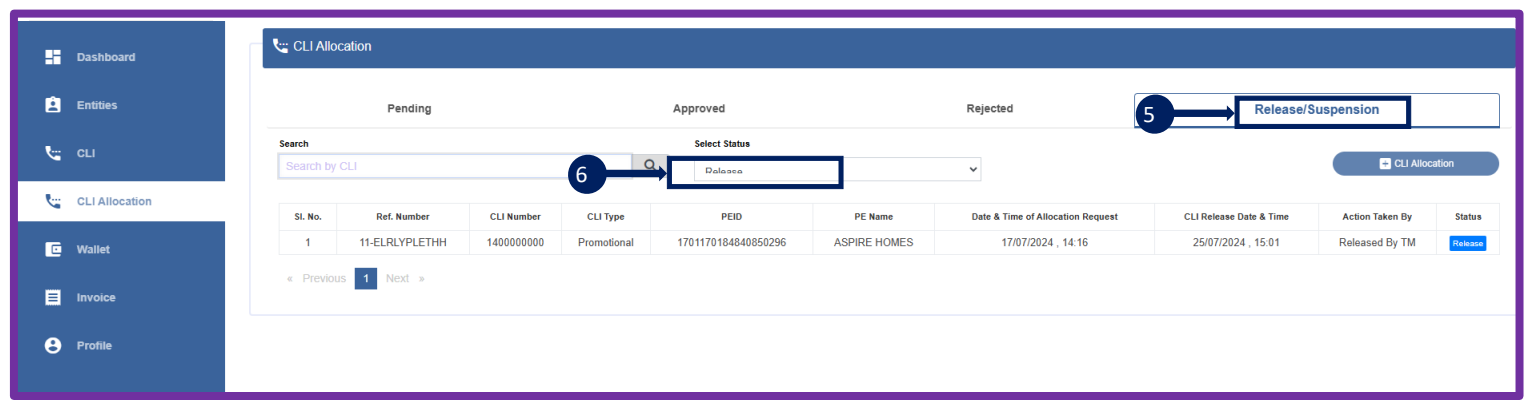


CLI details

Are you sure you want to Release this request ?

Remarks Please Enter Remarks

Yes No



CLI Allocation

Pending Approved Rejected Release/Suspension

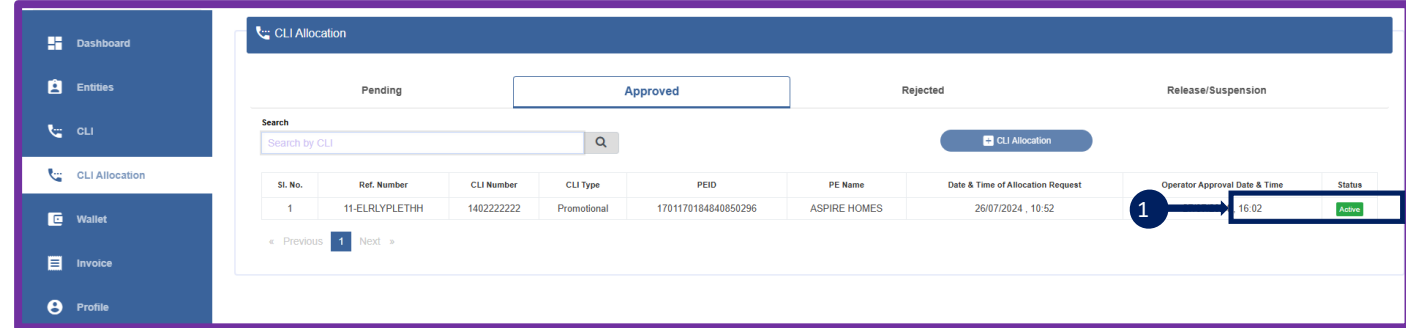
Search Search by CLI Q Select Status Release

Sl. No.	Ref. Number	CLI Number	CLI Type	PEID	PE Name	Date & Time of Allocation Request	CLI Release Date & Time	Action Taken By	Status
1	11-ELRLYPLETHH	1400000000	Promotional	1701170184840850296	ASPIRE HOMES	17/07/2024, 14:16	25/07/2024, 15:01	Released By TM	Release

« Previous 1 Next »

TM Panel – Suspension of CLI

- 1 Click on Active status to take action against any CLI
- 2 Click on Suspend Button to Suspend the CLI
- 3 Remarks regarding suspending that CLI
- 4 Submit the Yes Button to Process
- 5 Release and Suspended CLI shows under this section
- 6 Select the status to view status wise CLI



CLI Allocation

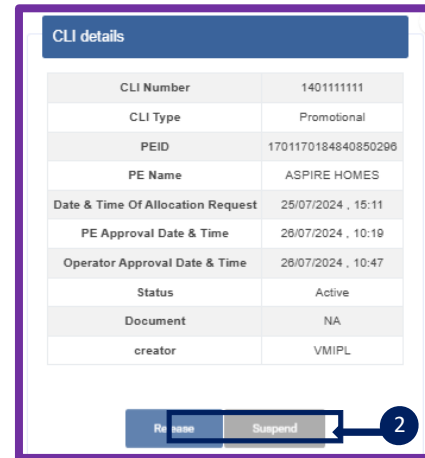
Pending Approved Rejected Release/Suspension

Search

Search by CLI

Sl. No.	Ref. Number	CLI Number	CLI Type	PEID	PE Name	Date & Time of Allocation Request	Operator Approval Date & Time	Status
1	11-ELRLYPLETHH	140222222	Promotional	1701170184840850296	ASPIRE HOMES	26/07/2024 , 10:52	16:02	Active

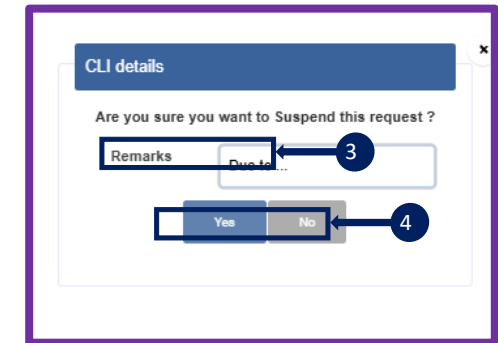
« Previous 1 Next »



CLI details

CLI Number	1401111111
CLI Type	Promotional
PEID	1701170184840850296
PE Name	ASPIRE HOMES
Date & Time Of Allocation Request	25/07/2024 , 15:11
PE Approval Date & Time	26/07/2024 , 10:19
Operator Approval Date & Time	26/07/2024 , 10:47
Status	Active
Document	NA
creator	VMIFPL

Release Suspend

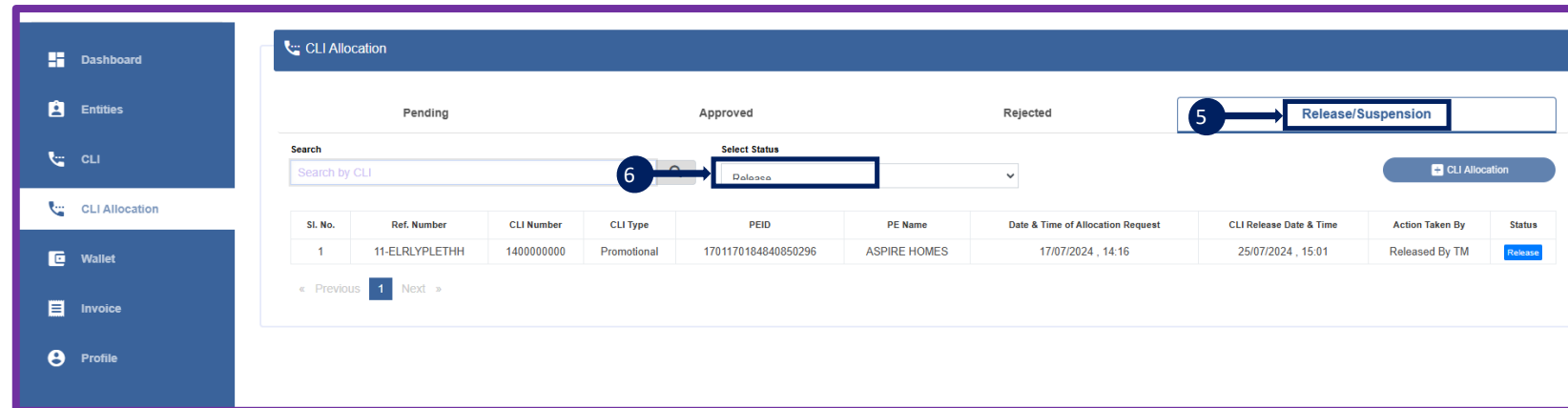


CLI details

Are you sure you want to Suspend this request ?

Remarks

Yes No



CLI Allocation

Pending Approved Rejected Release/Suspension

Search

Search by CLI

Select Status

Release

Sl. No.	Ref. Number	CLI Number	CLI Type	PEID	PE Name	Date & Time of Allocation Request	CLI Release Date & Time	Action Taken By	Status
1	11-ELRLYPLETHH	1400000000	Promotional	1701170184840850296	ASPIRE HOMES	17/07/2024 , 14:16	25/07/2024 , 15:01	Released By TM	Release

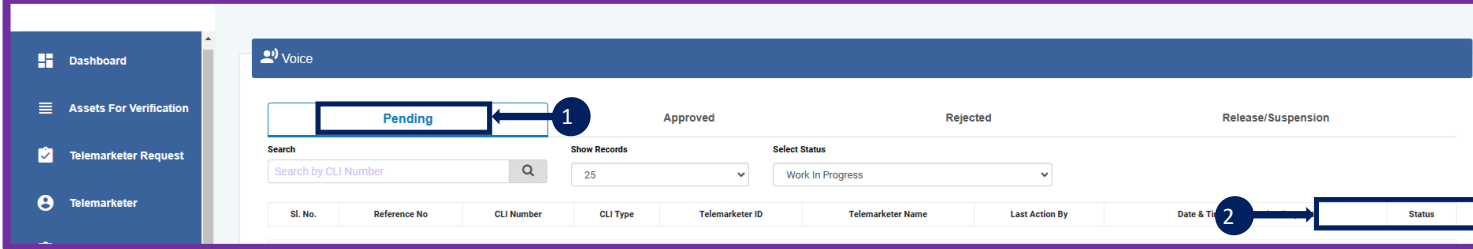
« Previous 1 Next »

Entity

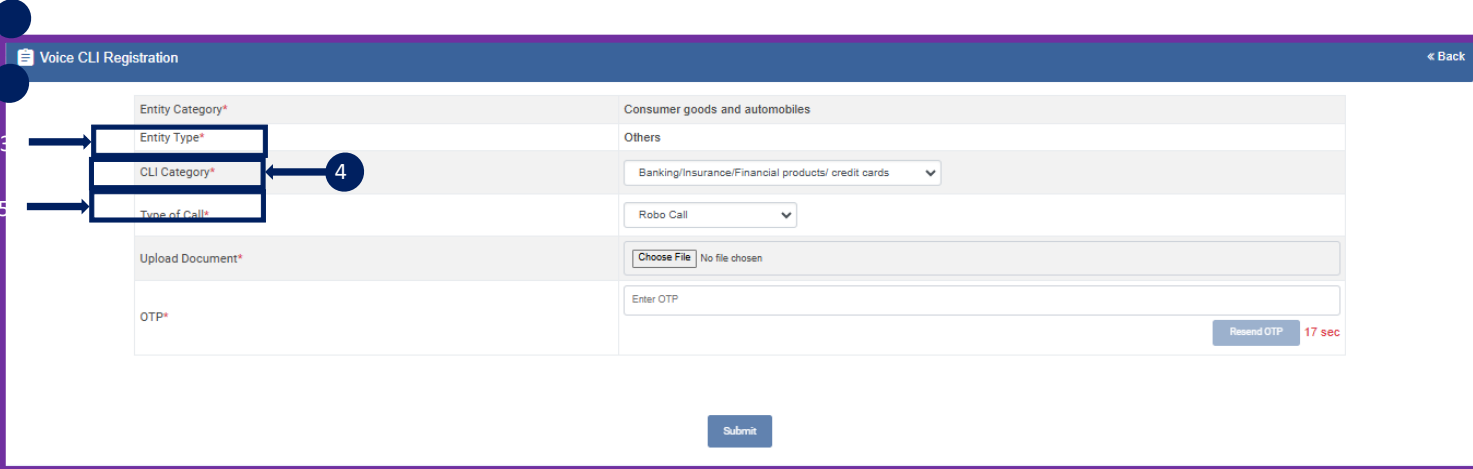
Who Opted for Voice can only get the option of Voice

CLI Allocation process at Entity panel

- 1 CLI request received from TM to PE shown in the pending section of Voice.
- 2 Click on Work In progress Status to fill other details for CLI allocation
- 3 Entity Category will be auto-fetched
- 4 Entity Type will be auto-fetched
- 5 Entity can select the CLI category



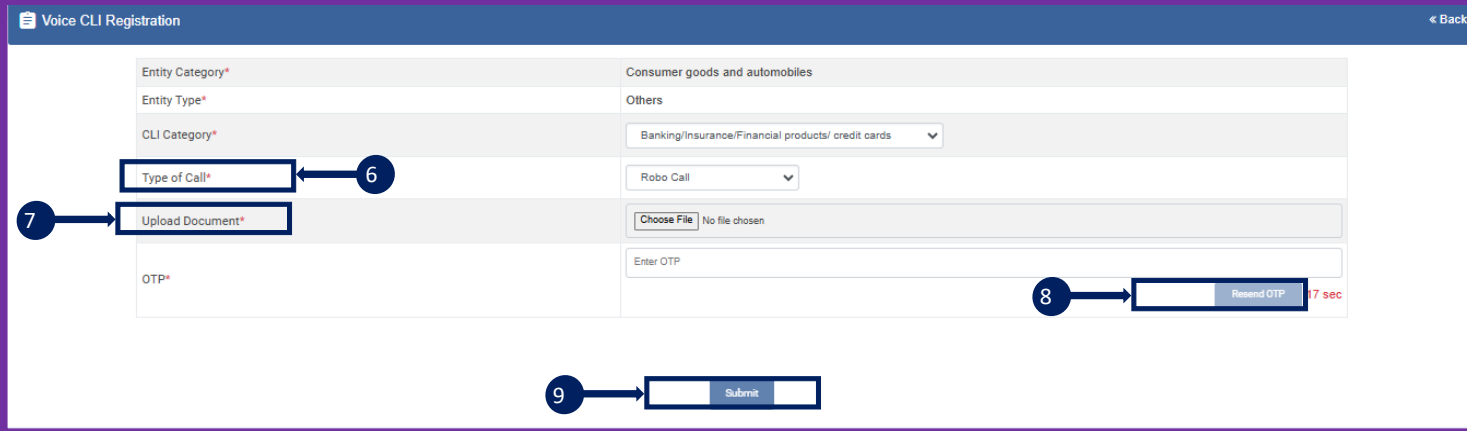
The screenshot shows the 'Voice' section of the application. A navigation menu on the left includes 'Dashboard', 'Assets For Verification', 'Telemarketer Request', and 'Telemarketer'. The main content area has a status filter set to 'Pending' (indicated by a circled '1'). Below the filter are search and filter options, including 'Search by CLI Number', 'Show Records' (set to 25), and 'Select Status' (set to 'Work In Progress'). A table below lists CLI requests with columns for 'Sl. No.', 'Reference No.', 'CLI Number', 'CLI Type', 'Telemarketer ID', 'Telemarketer Name', 'Last Action By', 'Date & Time', and 'Status'. A circled '2' points to the 'Status' column.



The screenshot shows the 'Voice CLI Registration' form. The form fields are: 'Entity Category*' (pre-filled with 'Consumer goods and automobiles'), 'Entity Type*' (pre-filled with 'Others'), 'CLI Category*' (a dropdown menu with 'Banking/insurance/Financial products/ credit cards' selected, indicated by a circled '4'), and 'Type of Call*' (a dropdown menu with 'Robo Call' selected). Below these are 'Upload Document*' (with a 'Choose File' button and 'No file chosen' text) and 'OTP*' (with an 'Enter OTP' field and a 'Resend OTP' button showing '17 sec'). A 'Submit' button is at the bottom.

CLI Allocation process at Entity panel (Contd..)

- 6 Choose the type of call
- 7 Upload required document if any
- 8 Option to generate the OTP on Entity mail
- 9 Submit the response
- 10 Once CLI allocation request approved from the Entity, Operator approval will also be required.
Once approved by the Operator the Allotted CLI show under approved section as Active.

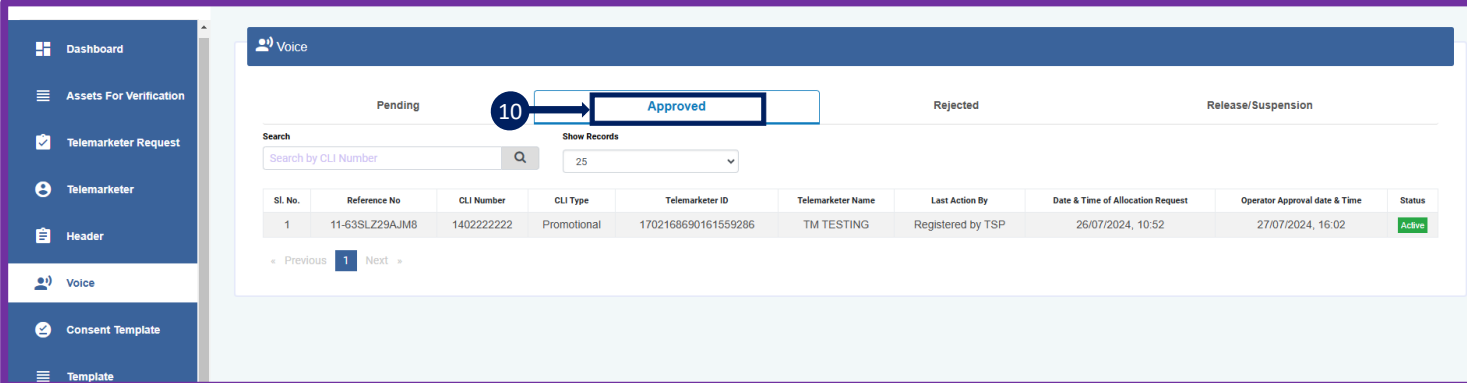


The screenshot shows the 'Voice CLI Registration' form. The fields are as follows:

- Entity Category*: Consumer goods and automobiles
- Entity Type*: Others
- CLI Category*: Banking/Insurance/Financial products/ credit cards
- Type of Call*: Robo Call
- Upload Document*: Choose File | No file chosen
- OTP*: Enter OTP

Numbered callouts indicate the following steps:

- 6: Points to the 'Type of Call*' dropdown menu.
- 7: Points to the 'Upload Document*' section.
- 8: Points to the 'Enter OTP' input field and the 'Resend OTP' button (17 sec).
- 9: Points to the 'Submit' button.



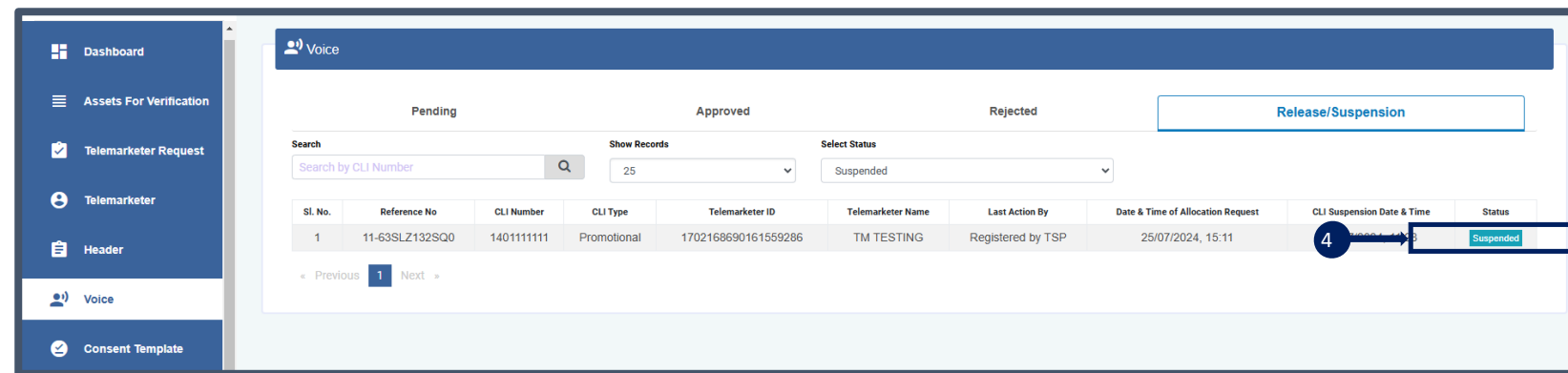
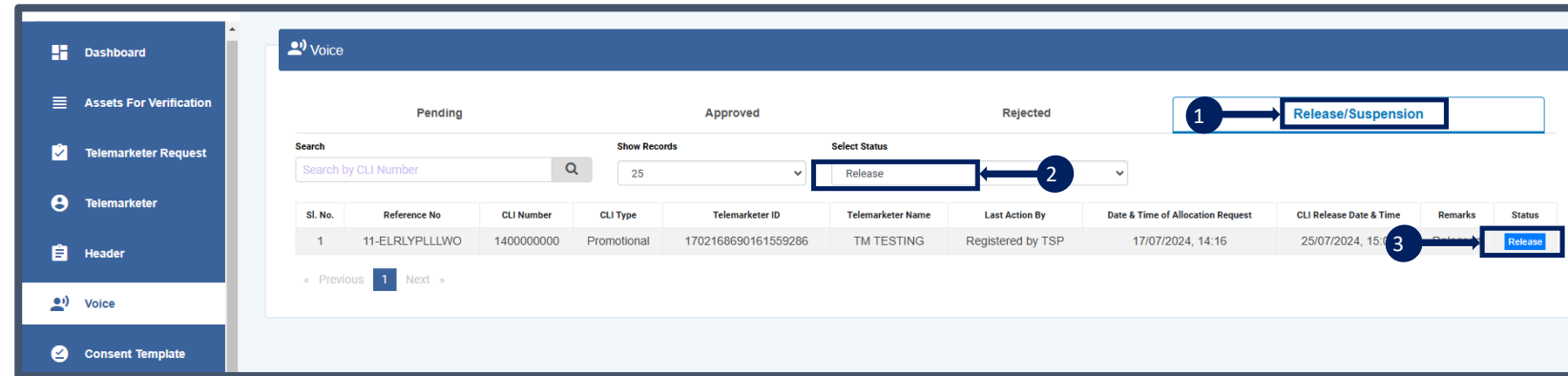
The screenshot shows the 'Voice' dashboard with a table of CLI allocation requests. The table has the following columns:

Sl. No.	Reference No	CLI Number	CLI Type	Telemarketer ID	Telemarketer Name	Last Action By	Date & Time of Allocation Request	Operator Approval date & Time	Status
1	11-63SLZ29AJMB	1402222222	Promotional	1702168690161559286	TM TESTING	Registered by TSP	26/07/2024, 10:52	27/07/2024, 16:02	Active

Numbered callout 10 points to the 'Approved' button in the top navigation bar.

Visibility to Entity – Post Release/ Suspension

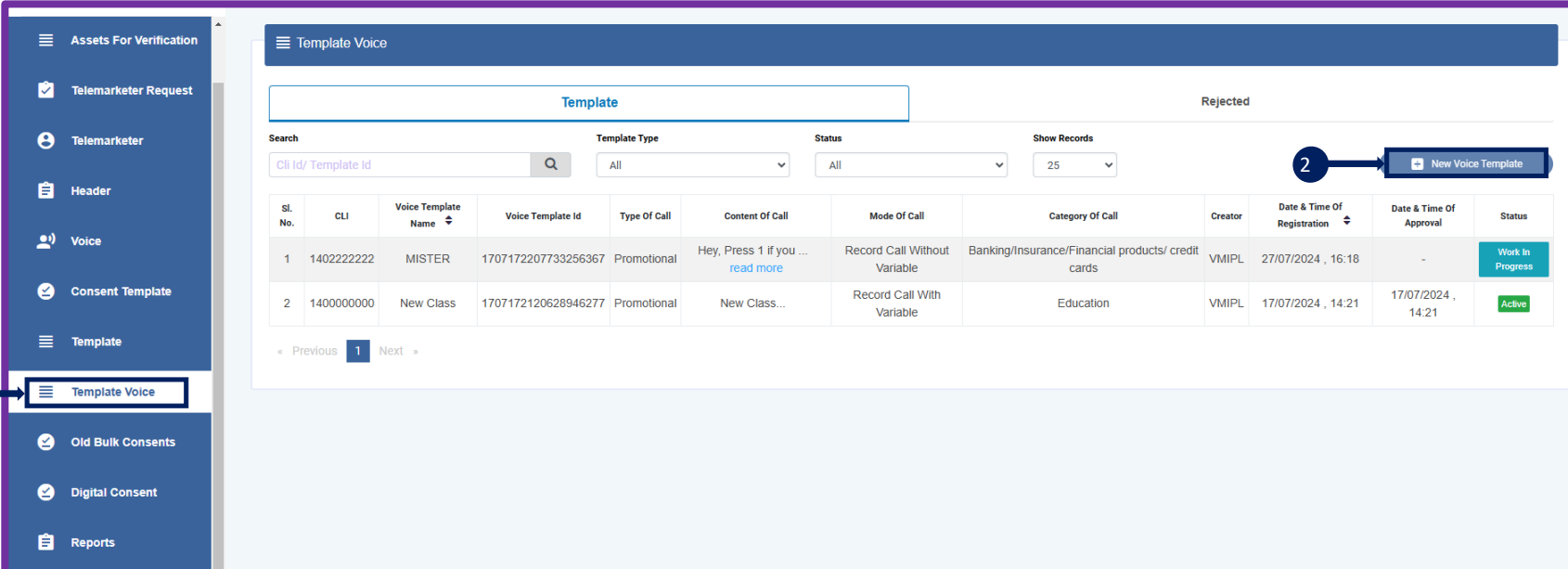
- 1 Click on Release/Suspension section to see all released and suspend CLI from the TM
- 2 Status wise selection is there e.g. Released or Suspended
- 3 Reflects the current status of Released CLI
- 4 Reflects the current status of suspended CLI



VOICE TEMPLATE REGISTRATION

Voice Template – Registration Entity Panel

- 1 To create the Voice Template -The Enterprise has to go in Template voice section
- 2 Click on New Voice Template



Template Voice

Template

Rejected

Search

CLI Id/ Template Id

Template Type

Status

Show Records

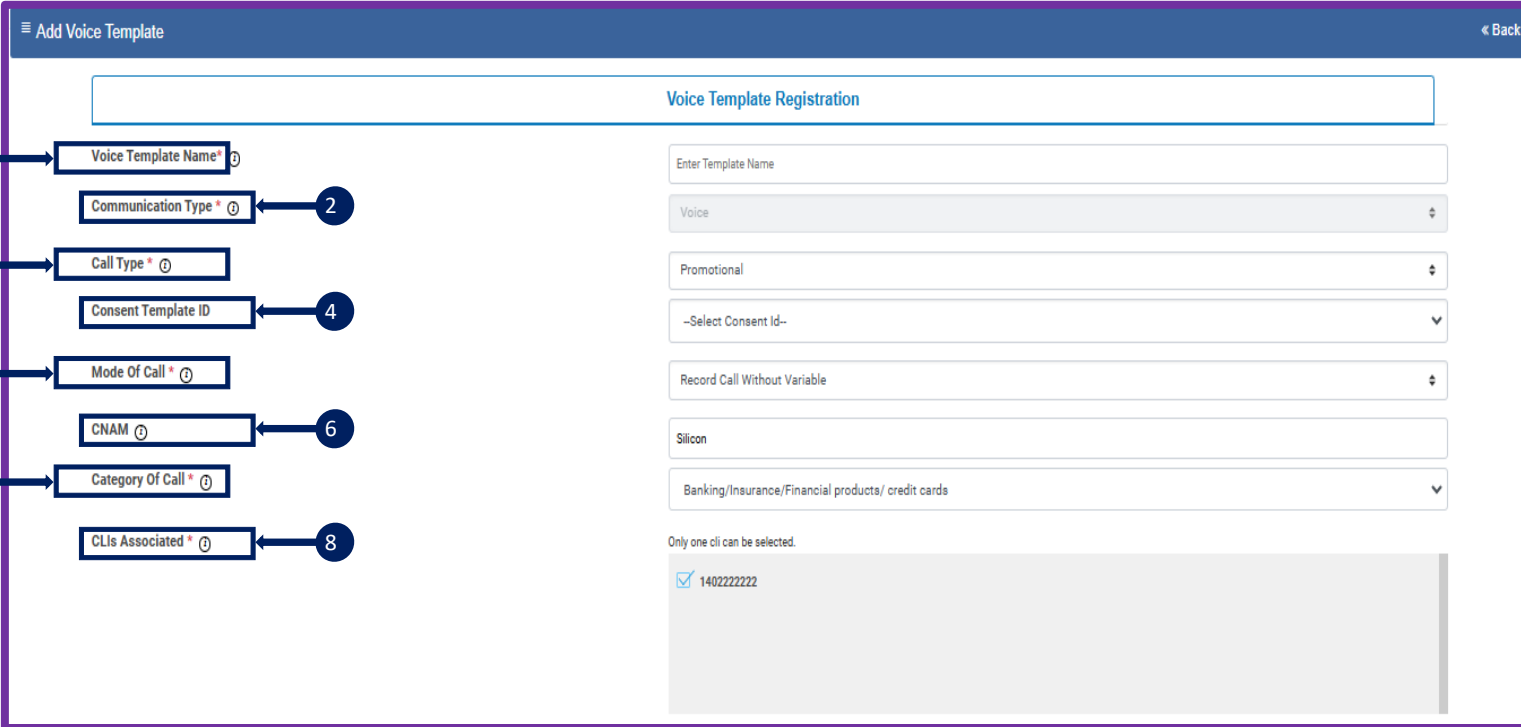
Sl. No.	CLI	Voice Template Name	Voice Template Id	Type Of Call	Content Of Call	Mode Of Call	Category Of Call	Creator	Date & Time Of Registration	Date & Time Of Approval	Status
1	1402222222	MISTER	1707172207733256367	Promotional	Hey, Press 1 if you ... read more	Record Call Without Variable	Banking/Insurance/Financial products/ credit cards	VMIPL	27/07/2024 , 16:18	-	Work In Progress
2	1400000000	New Class	1707172120628946277	Promotional	New Class...	Record Call With Variable	Education	VMIPL	17/07/2024 , 14:21	17/07/2024 , 14:21	Active

« Previous 1 Next »

New Voice Template

Voice Template – Registration by PE

- 1 Enter the name of voice template
- 2 Communication type which is default as Voice
- 3 Enterprise can select the type of call e.g. promo etc.
- 4 Select the consent template ID if any
- 5 Select mode of call like P2P, Record call etc.
- 6 Enter the CNAM name
- 7 Select the category from dropdown e.g. Banking , real estate etc.
- 8 Show if a CLI is associated, as only one CLI can be linked to each template.



Add Voice Template ← Back

Voice Template Registration

1 →

← 2

3 →

← 4

5 →

← 6

7 →

← 8

Enter Template Name

Voice

Promotional

-Select Consent Id-

Record Call Without Variable

Silicon

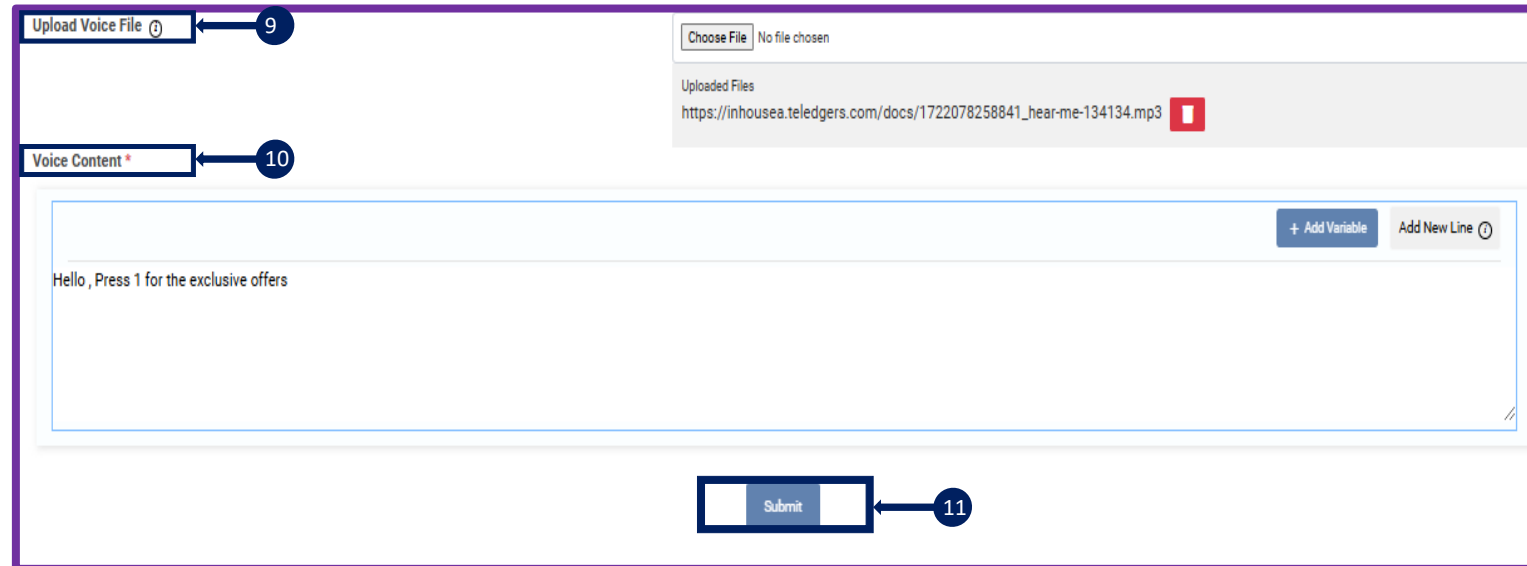
Banking/Insurance/Financial products/ credit cards

Only one cli can be selected.

1402222222

Voice Template – Registration by PE (Contd..)

- 9 Upload the voice file in wav & mp3 format only up to 25 MB
- 10 In the Voice content enterprise can put the template content
- 11 Click on Submit Button



The screenshot shows a web form for registering a voice template. It includes the following elements:

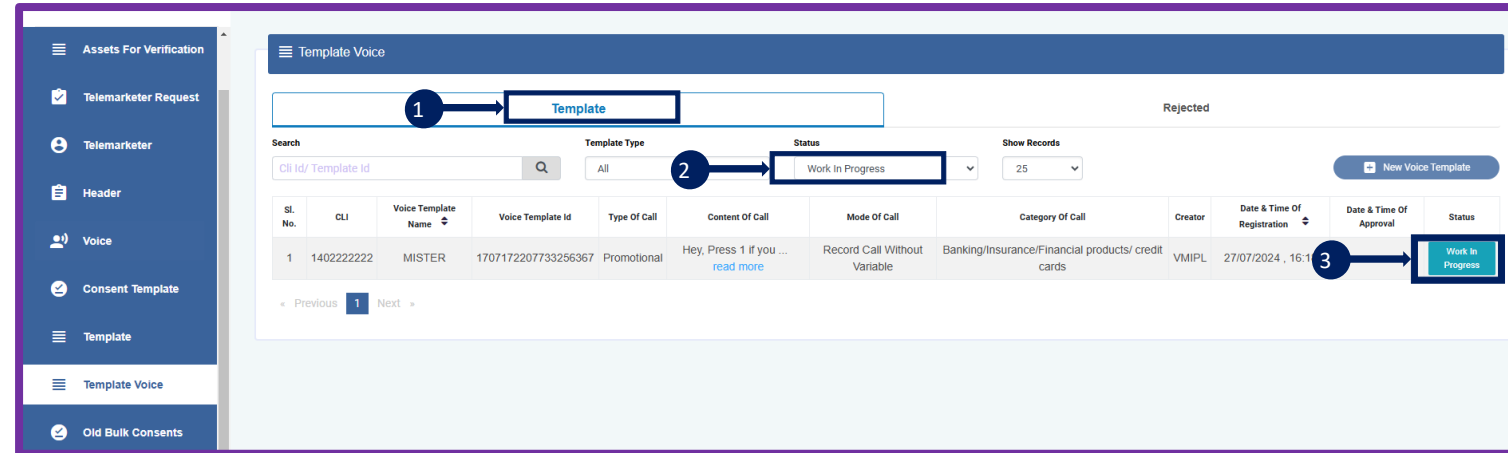
- 9**: A button labeled "Upload Voice File" with a help icon.
- 10**: A text input field labeled "Voice Content *".
- 11**: A "Submit" button.

Additional details from the form:

- A "Choose File" button with the text "No file chosen".
- An "Uploaded Files" section showing a file named "https://inhousea.teledgers.com/docs/1722078258841_hear-me-134134.mp3" with a red play button icon.
- A text area containing the content: "Hello , Press 1 for the exclusive offers".
- Buttons for "+ Add Variable" and "Add New Line" in the top right of the text area.

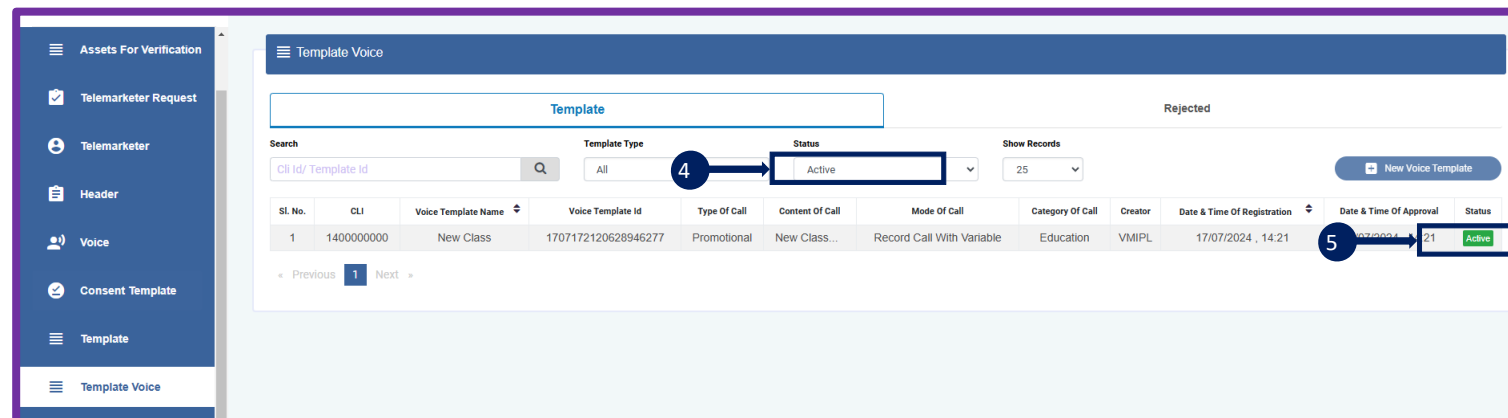
Voice Template – Post Submission

- 1 Post submission Entity click on template section to see all request
- 2 Status wise request can be selected from here e.g. Work in progress
- 3 If status is work in progress means its not approved by the operator yet
- 4 To see the Active Templates select the active from the dropdown
- 5 Status of the approved template request from the operator



The screenshot shows the 'Template Voice' interface. A sidebar on the left contains navigation options: Assets For Verification, Telemarketer Request, Telemarketer, Header, Voice, Consent Template, Template, Template Voice, and Old Bulk Consents. The main area has a search bar and filters for Template Type (All) and Status (Work In Progress). A table lists template details, with the first row highlighted and its status 'Work In Progress' indicated by a green box and a callout arrow.

Sl. No.	CLI	Voice Template Name	Voice Template Id	Type Of Call	Content Of Call	Mode Of Call	Category Of Call	Creator	Date & Time Of Registration	Date & Time Of Approval	Status
1	140222222	MISTER	1707172207733256367	Promotional	Hey, Press 1 if you ... read more	Record Call Without Variable	Banking/Insurance/Financial products/ credit cards	VM IPL	27/07/2024, 16:1		Work In Progress

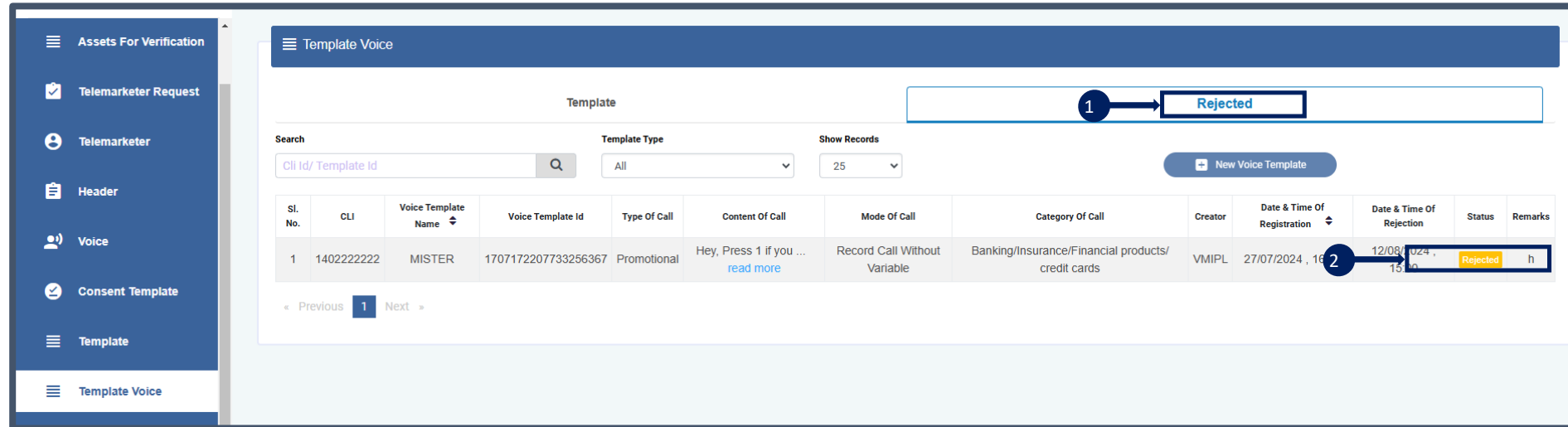


The screenshot shows the 'Template Voice' interface with the Status filter set to 'Active'. The table lists template details, with the first row highlighted and its status 'Active' indicated by a green box and a callout arrow.

Sl. No.	CLI	Voice Template Name	Voice Template Id	Type Of Call	Content Of Call	Mode Of Call	Category Of Call	Creator	Date & Time Of Registration	Date & Time Of Approval	Status
1	1400000000	New Class	1707172120628946277	Promotional	New Class...	Record Call With Variable	Education	VM IPL	17/07/2024, 14:21		Active

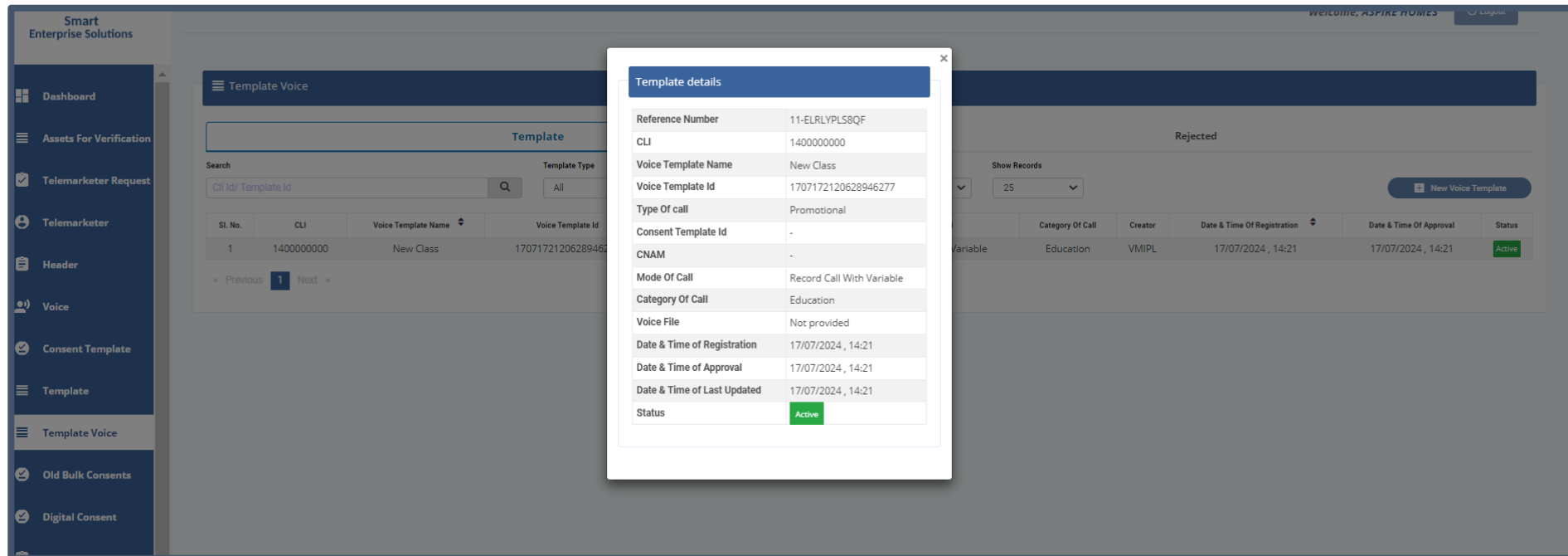
Voice Template – Rejected

- 1 Click on the Rejected section to see all Rejected request from the operator
- 2 Click on status to see the detailed information of the request



The screenshot shows the 'Template Voice' management interface. On the left is a navigation menu with 'Template Voice' selected. The main area has a search bar and filters. A table lists templates, with the first row highlighted and its status 'Rejected' circled in red. A red arrow points from the number '1' to the 'Rejected' status.

Sl. No.	CLI	Voice Template Name	Voice Template Id	Type Of Call	Content Of Call	Mode Of Call	Category Of Call	Creator	Date & Time Of Registration	Date & Time Of Rejection	Status	Remarks
1	1402222222	MISTER	1707172207733256367	Promotional	Hey, Press 1 if you ... read more	Record Call Without Variable	Banking/Insurance/Financial products/ credit cards	VMIPL	27/07/2024, 16:15	12/08/2024, 15:10	Rejected	h



The screenshot shows the 'Template Voice' interface with a 'Template details' modal open. The modal displays the following information:

Template details	
Reference Number	11-ELRLYPLS8QF
CLI	1400000000
Voice Template Name	New Class
Voice Template Id	1707172120628946277
Type Of call	Promotional
Consent Template Id	-
CNAM	-
Mode Of Call	Record Call With Variable
Category Of Call	Education
Voice File	Not provided
Date & Time of Registration	17/07/2024, 14:21
Date & Time of Approval	17/07/2024, 14:21
Date & Time of Last Updated	17/07/2024, 14:21
Status	Active

Thank You