



Welcome to Connect Enterprise Solutions

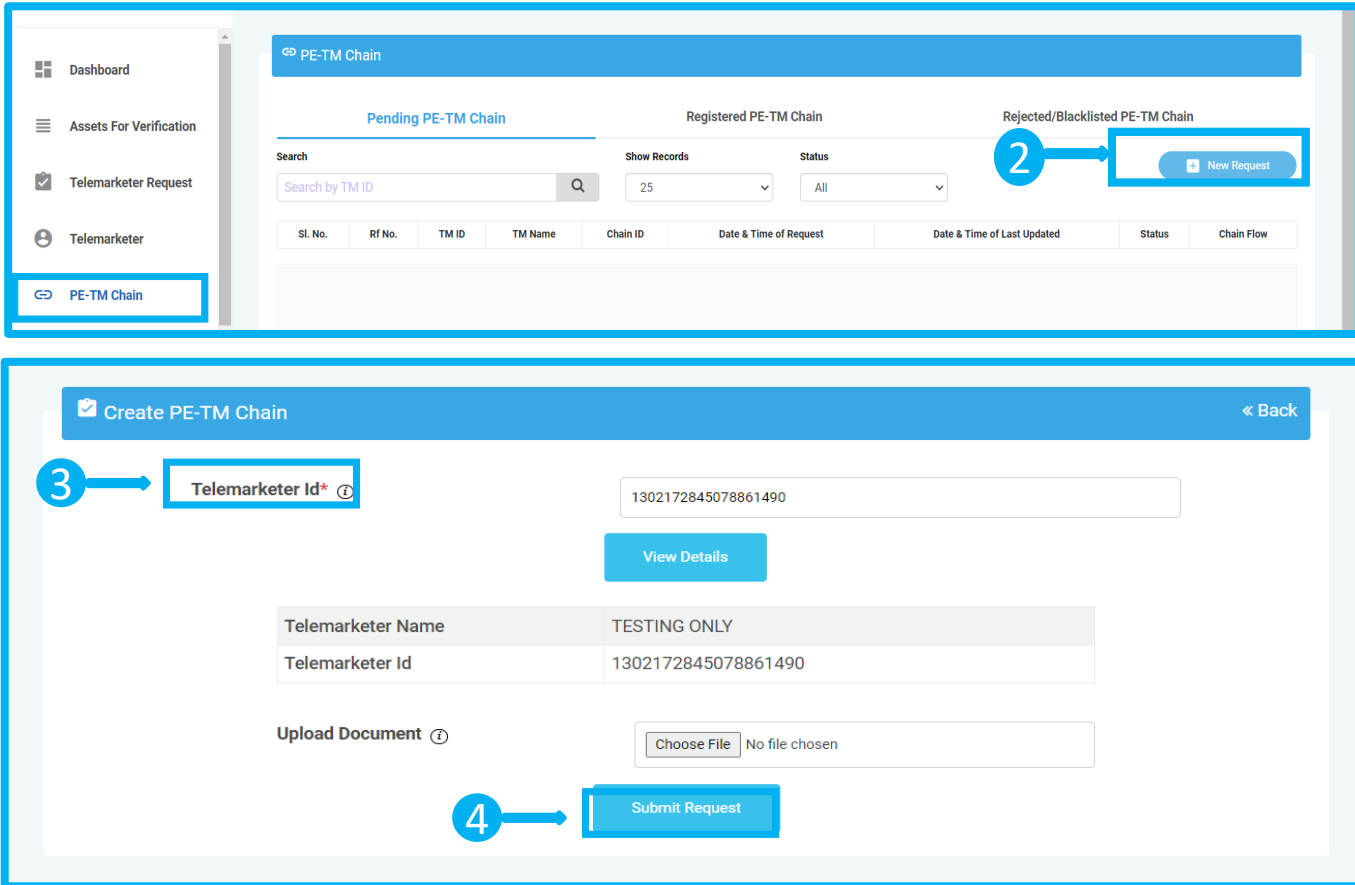
USER MANUAL

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.
- 4 Click on “Submit Button”.
The request will be submitted to TM for acceptance & defining its role as TM aggregator or TM Delivery.



The screenshot displays the 'PE-TM Chain' management interface. On the left, a side menu contains 'PE-TM Chain' (highlighted with a blue box and a circled '1'). The main content area shows three tabs: 'Pending PE-TM Chain', 'Registered PE-TM Chain', and 'Rejected/Blacklisted PE-TM Chain'. A 'New Request' button is highlighted with a blue box and a circled '2'. Below the tabs is a search bar and a table with columns: Sl. No., Rf No., TM ID, TM Name, Chain ID, Date & Time of Request, Date & Time of Last Updated, Status, and Chain Flow.

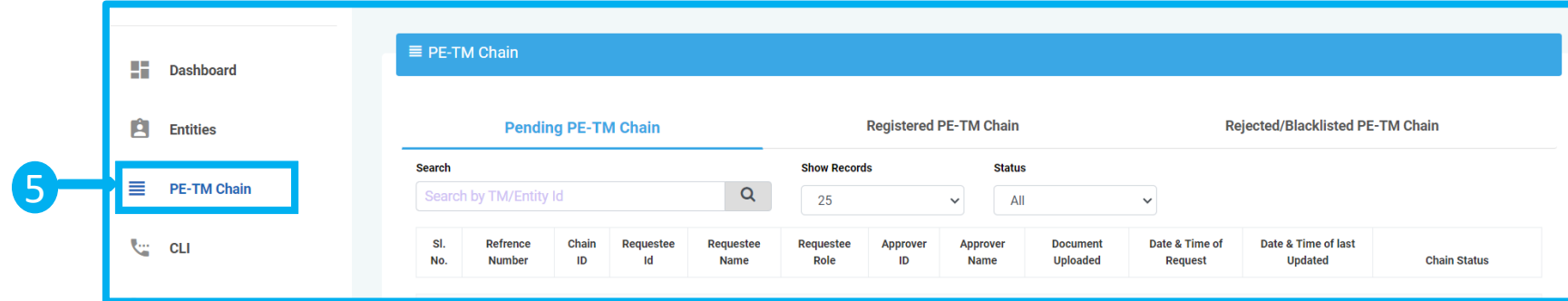
The second screenshot shows the 'Create PE-TM Chain' form. A 'Telemarketer Id*' field is highlighted with a blue box and a circled '3', containing the value '1302172845078861490'. Below it is a 'View Details' button. A table displays the following information:

Telemarketer Name	TESTING ONLY
Telemarketer Id	1302172845078861490

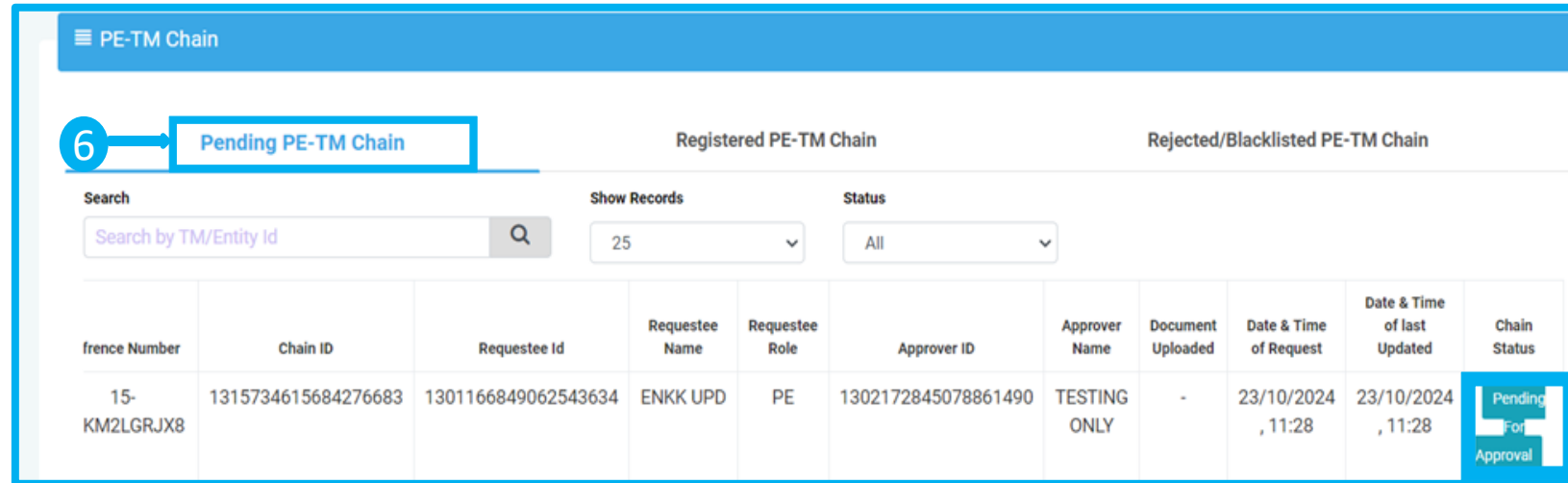
Below the table is an 'Upload Document' section with a 'Choose File' button and the text 'No file chosen'. A 'Submit Request' button is highlighted with a blue box and a circled '4'.

Pending request with TM

5 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.



6 On the PE 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".



7 On the TM panel Click on Pending for approval.

Pending with TM

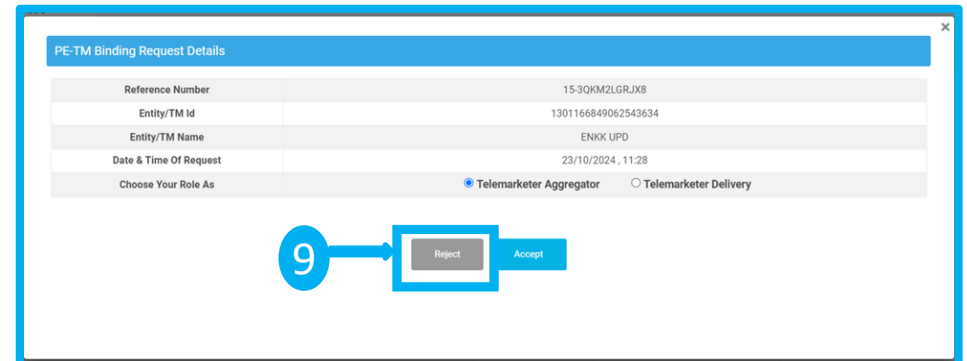
- 8 TM has to select his role (TM-A/TM-D) and click on the Accept button.
- 9 If TM rejected the request by clicking on the Reject button.
- 10 The rejected request will go under Rejected/Blacklisted PE-TM Chain section with chain status as "Rejected".



PE-TM Binding Request Details

Reference Number	15-3QKM2LGRJX8
Entity/TM Id	1301166849062543634
Entity/TM Name	ENKK UPD
Date & Time Of Request	23/10/2024 , 11:28
Choose Your Role As	<input checked="" type="radio"/> Telemarketer Aggregator <input type="radio"/> Telemarketer Delivery

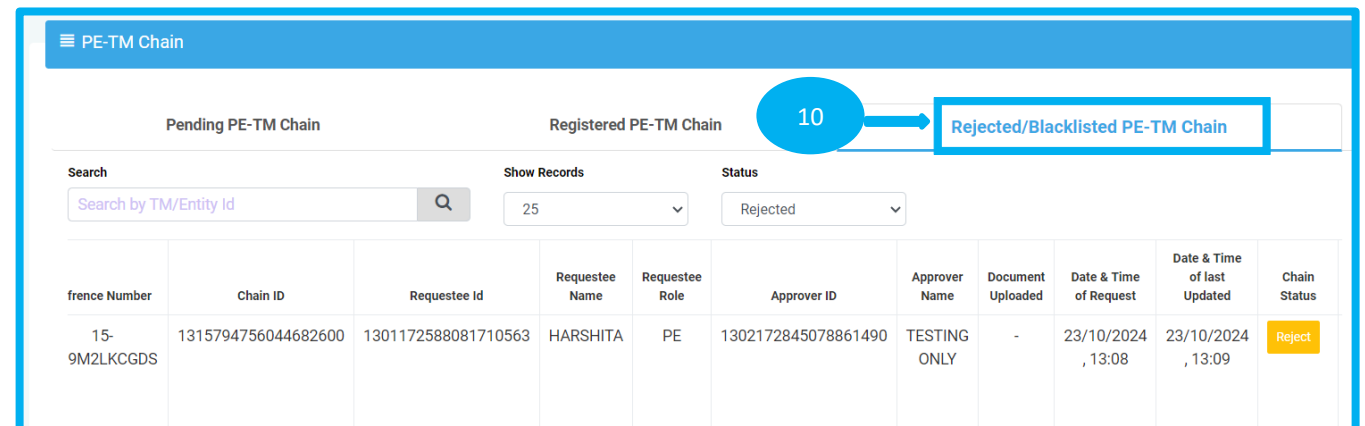
8 → Accept



PE-TM Binding Request Details

Reference Number	15-3QKM2LGRJX8
Entity/TM Id	1301166849062543634
Entity/TM Name	ENKK UPD
Date & Time Of Request	23/10/2024 , 11:28
Choose Your Role As	<input checked="" type="radio"/> Telemarketer Aggregator <input type="radio"/> Telemarketer Delivery

9 → Reject



PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain 10 → Rejected/Blacklisted PE-TM Chain

Search: Search by TM/Entity Id Show Records: 25 Status: Rejected

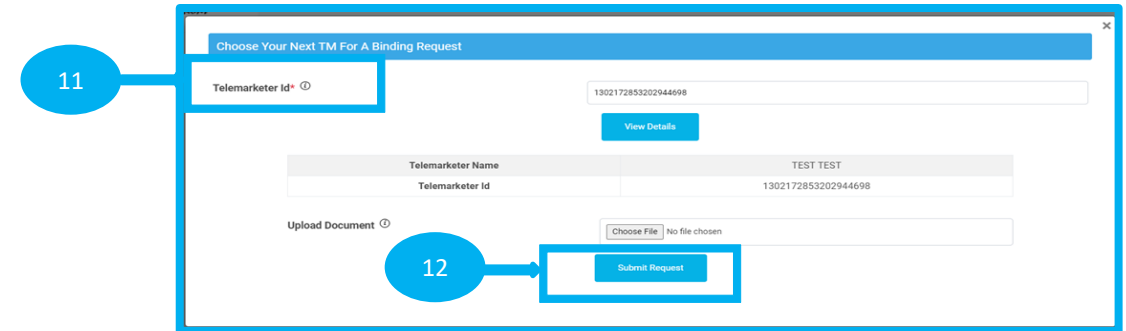
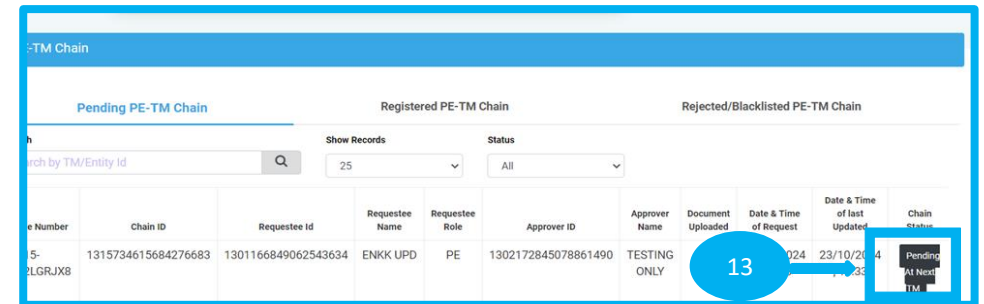
Reference Number	Chain ID	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chain Status
15-9M2LKCGDS	1315794756044682600	1301172588081710563	HARSHITA	PE	1302172845078861490	TESTING ONLY	-	23/10/2024 , 13:08	23/10/2024 , 13:09	Reject

Pending with TM

11 While accepting. If TM will select its role as TM aggregator. Then TM has to enter the next Telemarketer ID. Then click on the view details button. The details of TM will appear.

12 Click on the Submit Button.

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

Request Number	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
5-2LGRJXB	1315734615684276683	1301166849062543634	ENKK UPD	PE	1302172845078861490	TESTING ONLY		23/10/2024 14:33	23/10/2024 14:33	Pending At Next TM

Status View at Entity Panel

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

15 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, two TM-A and only one TM-D are allowed.

The screenshot shows the 'PE-TM Chain' interface. The left sidebar contains navigation items: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, PE-TM Chain, and CTA Whitelisting. The main content area is titled 'PE-TM Chain' and has three tabs: 'Pending PE-TM Chain' (selected), 'Registered PE-TM Chain', and 'Rejected/Blacklisted PE-TM Chain'. Below the tabs, there is a search bar with 'Search by TM ID', a 'Show Records' dropdown set to '25', and a 'Status' dropdown set to 'All'. A 'New Request' button is in the top right. A table displays the following data:

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-3QKM2LGRJX8	1302172845078861490	TESTING ONLY	1315734615684276683	23/10/2024, 11:28	23/10/2024, 11:28	Pending at TM	
2	15-3QKM2LGMT83	TM 1302172845078861490	TESTING ONLY	1315732403428142926	23/10/2024, 11:25	23/10/2024, 11:25	Pending at TM	
3	15-3QKM2LF9C4R	1302166848996203971	TMKK	1315709320474574529	23/10/2024, 10:46	23/10/2024, 10:46	Pending at TM	

At the bottom of the table, there are navigation links: « Previous 1 Next ».

The screenshot shows the 'PE-TM Chain' interface with the 'Pending PE-TM Chain' tab selected. The search and filter options are the same as in the previous screenshot. The table displays the following data:

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-3QKM2LGRJX8	1302172845078861490	TESTING ONLY	1315734615684276683	23/10/2024,	23/10/2024, 11:33	Chain In-process	

A callout '15' points to the 'Chain In-process' status in the table.

Request approve by TM

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

17 The status will change to “Pending at Entity” in the PE TM Chain Section in TM panel.

The Request will go to the entity for final Approval of the chain.

PE-TM Binding Request Details

Reference Number	15-3QKM2LJA4ZS
Entity/TM Id	1301172588081710563
Entity/TM Name	HARSHITA
Date & Time Of Request	23/10/2024, 12:39
Choose Your Role As	<input type="radio"/> Telemarketer Aggregator <input checked="" type="radio"/> Telemarketer Delivery

16 Accept

PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain

Search: Search by TM/Entity Id Show Records: 25 Status: All

Reference Number	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
15-QKM2LJA4ZS	1315776879162322968	1301172588081710563	HARSHITA	PE	1302172853202944698	TEST TEST	-	23/10/2024, 12:47	23/10/2024, 12:47	Pending At Entity

17

Request approval/rejection by Entity

18

Entity can view the complete chain by clicking on the “chain flow” icon.

The screenshot shows the 'PE-TM Chain' interface. It has a sidebar with navigation options: Dashboard, Assets For Verification, Telemarketer Request, Telemarketer, and PE-TM Chain. The main content area is titled 'PE-TM Chain' and has three tabs: 'Pending PE-TM Chain', 'Registered PE-TM Chain', and 'Rejected/Blacklisted PE-TM Chain'. Below the tabs is a search bar with 'Search by TM ID', a 'Show Records' dropdown set to '25', and a 'Status' dropdown set to 'All'. A 'New Request' button is on the right. A table lists three requests. The first row is highlighted, and a blue circle with the number '18' points to a 'Chain Flow' icon in the 'Chain Flow' column of that row.

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-3QKM2LGRJX8	1302172845078861490	TESTING ONLY	1315734615684276683	23/10/2024, 11:28	23/10/2024, 11:33	Pending final approval	
2	15-3QKM2LGMT83	TM 1302172845078861490	TESTING ONLY	1315732403428142926	23/10/2024, 11:25	23/10/2024, 11:25	Pending at TM	
3	15-3QKM2LF9C4R	1302166848996203971	TMKK	1315709320474574529	23/10/2024, 10:46	23/10/2024, 10:46	Pending at TM	

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

The screenshot shows the 'PE-TM Chain' workflow details view for 'CHAIN ID: 1315734615684276683'. It displays 'View workflow details:*' and a table with the following data:

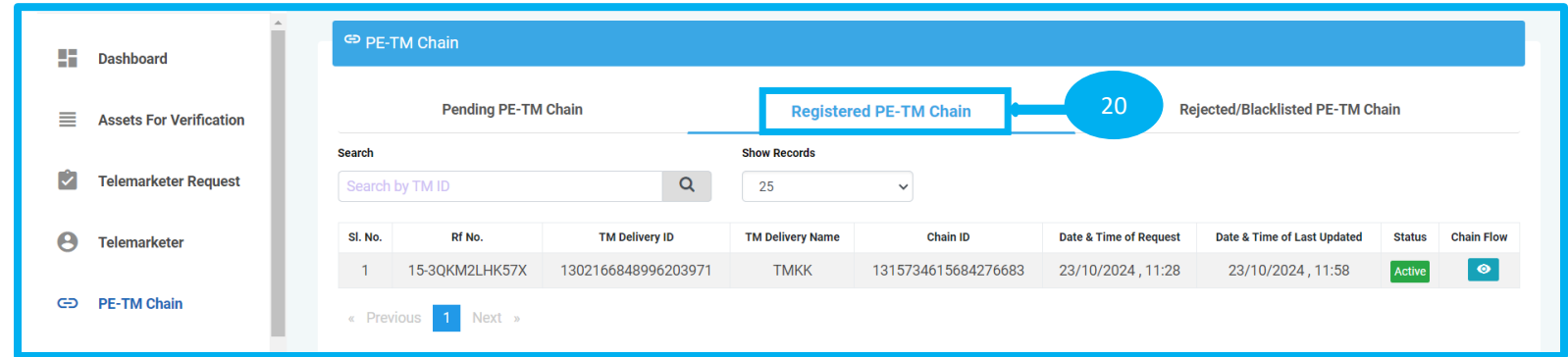
S No.	TM ID	TM Name	Role	Date & Time of Request	Date & Time of Last Updated	Status	Doc Uploaded
1	1302172845078861490	TESTING ONLY	TM-A	23/10/2024, 11:28	23/10/2024, 11:33	Approved	-
2	1302172853202944698	TEST TEST	TM-A	23/10/2024, 11:33	23/10/2024, 11:49	Approved	-
3	1302166848996203971	TMKK	TM-D	23/10/2024, 11:49	23/10/2024, 11:50	Approved	-

Below the table are 'Reject' and 'Approve' buttons. A blue circle with the number '19' points to the 'Approve' button.

Entity Registered and Rejected/Blacklisted PE-TM Chain Section

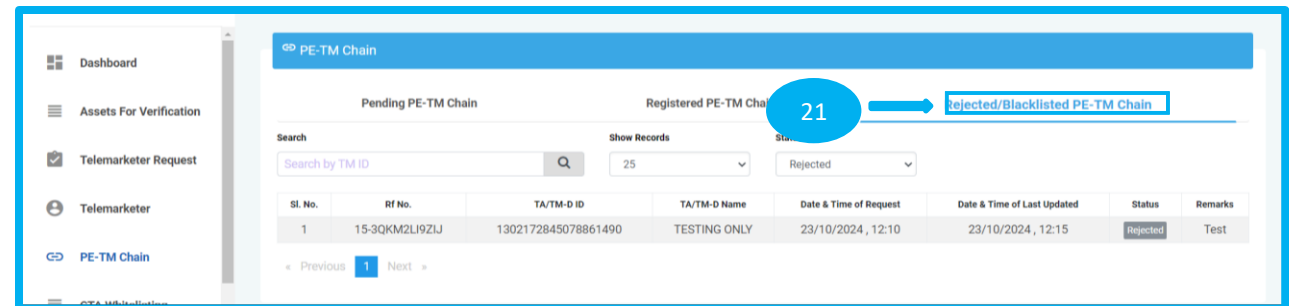
20

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



21

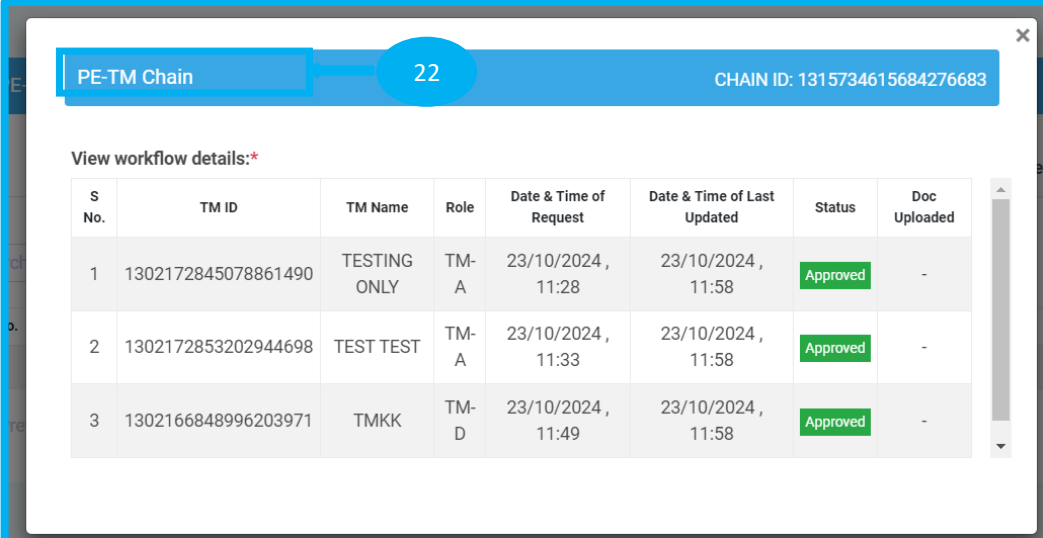
If Rejected by the Entity the chain will be visible under the “Rejected/Blacklisted PE-TM Chain section as status “Rejected”.



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.



PE-TM Chain CHAIN ID: 1315734615684276683

View workflow details:*

S No.	TM ID	TM Name	Role	Date & Time of Request	Date & Time of Last Updated	Status	Doc Uploaded
1	1302172845078861490	TESTING ONLY	TM-A	23/10/2024 , 11:28	23/10/2024 , 11:58	Approved	-
2	1302172853202944698	TEST TEST	TM-A	23/10/2024 , 11:33	23/10/2024 , 11:58	Approved	-
3	1302166848996203971	TMKK	TM-D	23/10/2024 , 11:49	23/10/2024 , 11:58	Approved	-

Note: If no action is taken within 72Hrs at any step the chain request will automatically get rejected With a remark (Auto Rejected).

Thank You !