Welcome to Smart 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.

Click on "Submit Button".

The request will be submitted to TM for acceptance & defining its role as TM aggregator or TM Delivery.

Create PE-TM C	hain		« Back
	xeter ld* ⊕	1702172916384128960	
	Telemarketer Name	View Details TM1 1702172916384128960	
	Upload Document ①	Choose File No file chosen	
	4 →	Submit Request	

Pending request at TM

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- 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".
 - On the TM panel Click on Pending for approval.

	Dashboard		PE-TM Ch	ain										
Ê	Entities		Р	ending P	E-TM Cha	iin		R	egistered P	E-TM Chain		Reje	ected/Blacklisted PE	-TM Chain
	PE-TM Chain	Sea	rch earch by TM	/Entity Id		_	Q	Show Record	s	Statu:	s ndina at TM	~		
5	сц	5	il. Refre	nce Cl	nain Requ	iestee Requ	uestee	Requestee	Approver	Approver	Document	Date & Time of	Date & Time of last	
	CLI Allocation	N	o. Num	ber	ID I	ld Na	ame	Role	ID	Name	Uploaded	Request	Updated	Chain Status



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Pending at 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".

											1
	F	РЕ-ТМ В	nding Re	equest Details						×	2
		Referen	e Numbe	r	-	5-P2TM2	MU5MQ8				
		Entit	/TM Id		13	01165356	164217542				
		Entity/	TM Name		GKSACCC	UNTANTS	S PRIVATE L	IMITED			
		Date & Tim	e Of Requ	uest		24/10/202	4 , 10:31				21
	1	Choose Y	our Role /	As 💿 Teler	marketer Agg	regator	⊖ Tele	emarketer E	Delivery		1
					872	Accept					
	E P	PE-TM Binding	Reque	st Details							×
		Reference Nur	ber		15	P2TM2M	VEYUD				
		Entity/TM Id	1		1301	16535616	34217542				
		Entity/TM Nar	ne	(SKS ACCOUR	TANTS		MITED			
		ate & Time Of R	equest		24	/10/2024	11:06				
	-	Change Very De				rotor		markatar	Deliver		
PE-TM Cha	in			Reject		ccept					
Pe	nding PE-TM Chain		Regis	stered PE-TM Chain	10		Rejected	/Blacklisted	PE-TM C	hain	
arch			Show Record	s	Status						
Search by TM/	Entity Id	Q	25	~	Rejected	~					
		Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chain Status	Rejected By	Remarks
ain ID	Requestee Id			170217291638412	8960 TM1	_	24/10/2024	24/10/2024	Reject	тм	44
aain ID 47931169042	Requestee Id	2 GKS ACCOUNTANTS PRIVATE LIMITED	PE	110211201000112			, 11:06	, 11:07			test

Pending at TM

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While accepting. If TM will select itsRole as TM aggregator. Then TM has toenter the next Telemarketer ID.Then click on the view details button.The details of TM will appear.



Click on the Submit Button.

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

	Request Approv	ed and sent to next	TM for fu	rther approval		×					
<u> </u>	Chain										
	Pending PE-TM Chai	n		Registered	PE-TM Cha	in	Re	jected/Blac	klisted PE-T	M Chain	
Search			Sho	ow Records	St	atus					
Search by	TM/Entity Id	Q	3	25	~	All 🗸					
ce Number	Chain ID	Requestee I	d	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chai
15- 2MU5MQ8	1715564195727932969	1301165356164	217542	GKS ACCOUNTANTS PRIVATE LIMITED	PE	1702172916384128960	TM1	-	13	24/10/20: 4	Pend At Ne 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.

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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.



~	Telemarketer Request	1	GÐ PE	-TM Chain					
8	Telemarketer			Pending PE-T	M Chain		Registered PE-TM Cha	in	Rejected/Blacklisted PE-TM Chain
Ð	PE-TM Chain		Search			Show Reco	rds Sta	itus	+ New Red
_			Search	by TM ID	Q	25	~	All 🗸	
	CTA Whitelisting		SI. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Reques	Time of Last Updated
	URL Shortener		1	15-P2TM2MV5CKI	1702172916485455948	TM2	171558086022305804	2 24/10/2024 , 10:	15 2024 , M:0 Chain In-process
Ê	Header		« Prev	ious 1 Next »					

USER MANUAL

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.

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

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

Chain		Registered	PE-TM Cha	ain	Re	ejected/Blac	cklisted PE-T	M Chain	
	Show Reco	rds	St	atus					
C	2 25		~	All 🗸					
in ID	Requestee Id	Requestee Name	Requestee Role	Approver ID	Approver Name	Document Uploaded	Date & Time of Request	Date & Time of last Updated	Chair Statu
727932969 17021	72916384128960	TM1	TM-A	1702172916485455948	TM2	-	17	2 <u>4/10/202</u> 4 , 10:33	Pendi At Entity
	Chain In ID 5727932969 17021	Chain Show Reco Q 25 in ID Requestee Id 5727932969 1702172916384128960	Chain Registered Show Records 25 in ID Requestee Id Requestee Name 5727932969 1702172916384128960 TM1	Chain Registered PE-TM Ch. Show Records St 25 25 in ID Requestee Id Requestee Id Requestee S727932969 1702172916384128960	Chain Registered PE-TM Chain Show Records Status 25 ~ 10 Requestee Id Name Role Role Approver ID 5727932969 1702172916384128960 TM1 TM-A 1702172916485455948	Chain Registered PE-TM Chain Re Show Records Status Q 25 All in ID Requestee Id Requestee Requestee Approver ID Approver ID 5727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2	Chain Registered PE-TM Chain Rejected/Black Show Records Status Q 25 Y All Y in ID Requestee Id Requestee Name Requestee Role Approver ID Approver Uploaded 5727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2 -	Chain Registered PE-TM Chain Rejected/Blacklisted PE-T Show Records Status 25 All in ID Requestee Id Requestee Name Role Approver ID Name Uploaded of Request 5727932969 1702172916384128960 TM1	Chain Registered PE-TM Chain Rejected/Blacklisted PE-TM Chain Show Records Status 25 X 10 Requestee Id Requestee Id Requestee Role Approver ID Name Uploaded 0727932969 1702172916384128960 TM1 TM-A 1702172916485455948 TM2

Request approval/rejection by Entity

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



	Pending PE-T	'M Chain		Registered PE-TM Cha	ain	Reje	ected/Blacklisted	PE-TM Chain	
earch			Show Rec	ords Sta	atus			+ Nev	v Request
Search	by TM ID	Q	25	~	All 🗸				
Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date	Updated	Status	Chain Flow
1	15-P2TM2MU5MQ8	1702172916384128960	TM1	1715564195727932969	24/10/2024 , 10:31	1	8 J:312	Pending final approval	





Entity Registered and Rejected/Blacklisted PE-TM Chain Section

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

	Pending PE-TM	Chain	Registere	d PE-TM Chain	20 Rej	ected/Blacklisted PE-TM C	hain	
earch			Show Records					
Search	by TM ID	Q	25	~				
SI. No.	Rf No.	TM Delivery ID	TM Delivery Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-P2TM2MU8M5G	1702172916485455948	TM2	1715564195727932969	24/10/2024 , 10:31	24/10/2024 , 10:52	Active	۲

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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".

	Pending PE-TM Chain		Registered PE-TM Ch	21	Rejected/Blacklisted PE-T	M Chain	
earch		Sh	ow Records	Status			
Search by	TM ID	Q	25 🗸	Rejected ~			
SI. No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Date & Time of Request	Date & Time of Last Updated	Status	Remarks
1	15-P2TM2MVGJ8J	17021729163841289	960 TM1	24/10/2024 , 11:06	24/10/2024, 11:07	Rejected	test

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Chain flow on Entity Panel

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

-							
iew S No.	workflow details:* TM ID	TM Name	Role	Date & Time of Request	Date & Time of Last Updated	Status	Doc 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	-

Note: If no action is taken within 72Hrs the chain request will automatically get rejected.

Thank You !