

Welcome to Smart Enterprise Solutions

USER MANUAL

PE-TM Chain

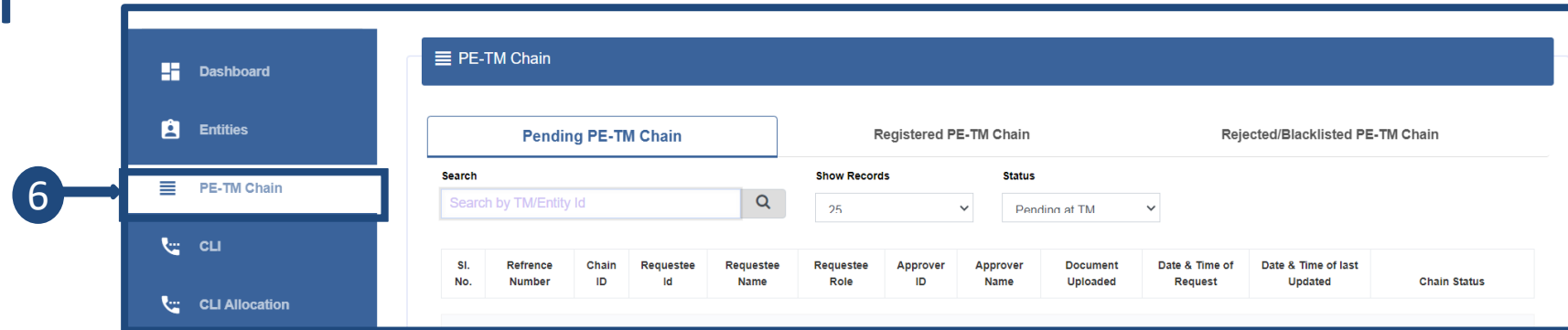
PE-TM Chain

Request Initiated by PE

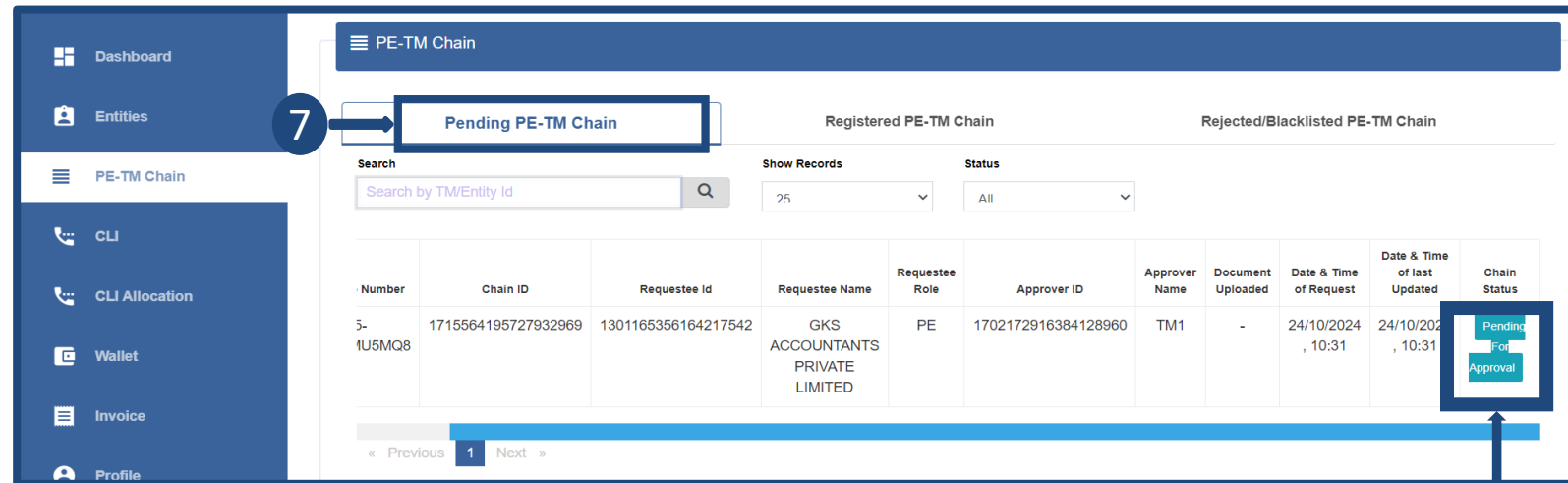
- 1 On the Entity panel in the side menu bar, there will be a “PE-TM Chain” option.
- 2 The option of initiating a new request will be there.
- 3 The Entity has to enter the respective Telemarketer ID. Then click on view details, and the name of the TM will appear.
Upload the document if required.
- 4 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.

Pending request at TM

6 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.



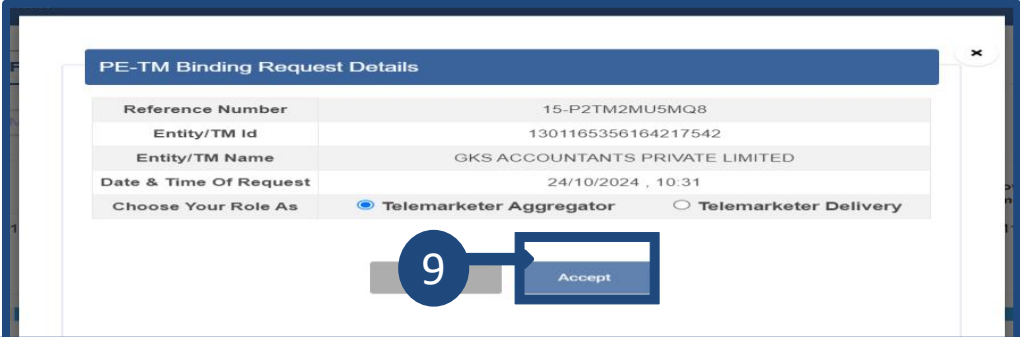
7 On the TM panel When the entity sends the binding request to TM, it will be visible under the pending PE-TM chain section with the status "Pending for Approval".



8 On the TM panel Click on Pending for approval.

Pending at TM

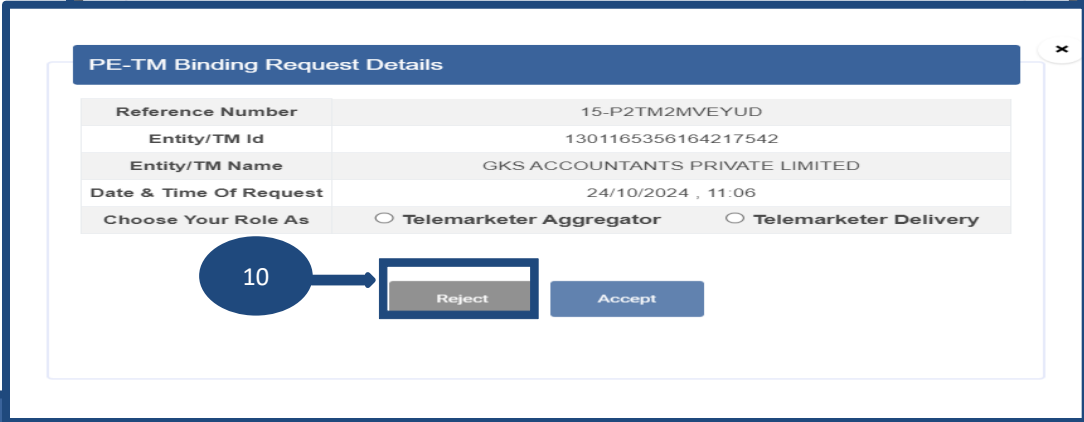
- 9 TM has to select his role (TM-A/TM-D) and click on the Accept button.
- 10 If TM rejected the request by clicking on the Reject button.
- 11 The rejected request will go under Rejected/Blacklisted PE-TM Chain section with chain status as "Rejected".



PE-TM Binding Request Details

Reference Number	15-P2TM2MU5MQ8
Entity/TM Id	1301165356164217542
Entity/TM Name	GKS ACCOUNTANTS PRIVATE LIMITED
Date & Time Of Request	24/10/2024 , 10:31
Choose Your Role As	<input checked="" type="radio"/> Telemarketer Aggregator <input type="radio"/> Telemarketer Delivery

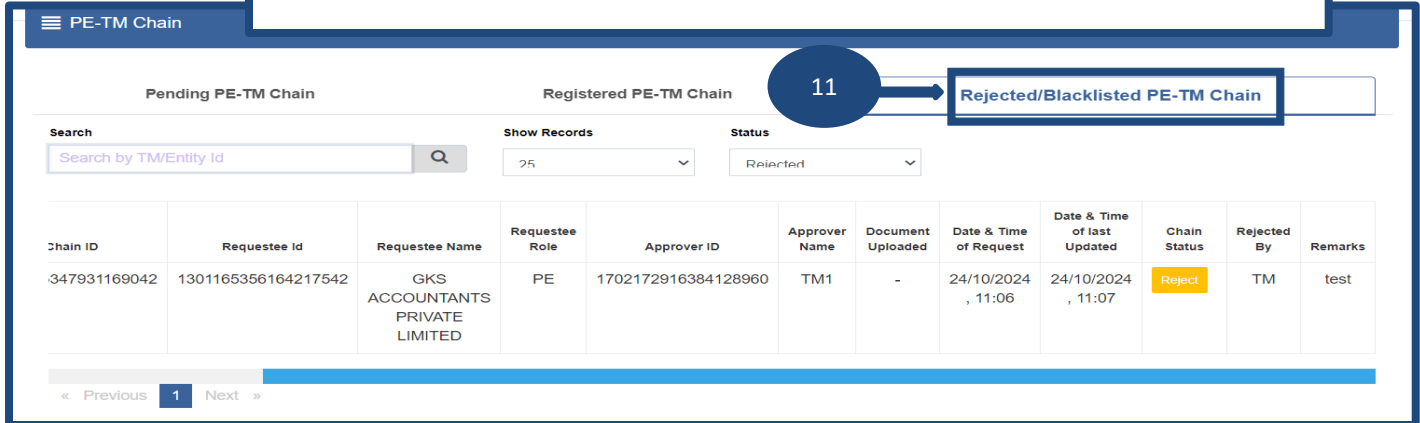
9 → Accept



PE-TM Binding Request Details

Reference Number	15-P2TM2MVEYUD
Entity/TM Id	1301165356164217542
Entity/TM Name	GKS ACCOUNTANTS PRIVATE LIMITED
Date & Time Of Request	24/10/2024 , 11:06
Choose Your Role As	<input type="radio"/> Telemarketer Aggregator <input type="radio"/> Telemarketer Delivery

10 → Reject Accept



PE-TM Chain

Pending PE-TM Chain Registered PE-TM Chain 11 → Rejected/Blacklisted PE-TM Chain

Search: Search by TM/Entity Id

Show Records: 25

Status: Rejected

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 LIMITED	PE	1702172916384128960	TM1	-	24/10/2024 , 11:06	24/10/2024 , 11:07	Reject	TM	test

« Previous 1 Next »

Pending at TM

12 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.

13 Click on the Submit Button.

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

Request Approved and sent to next TM for further approval

×

Welcome, TM1

Logout

☰ 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

▼

Case 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
15-2MU5MQ8	1715564195727932969	1301165356164217542	GKS ACCOUNTANTS PRIVATE LIMITED	PE	1702172916384128960	TM1	-	24/10/2023	24/10/2023	Pending At Next TM

« Previous

1

Next »

Status View at Entity Panel

15

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

PE-TM Chain

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

Search Show Records Status New Request

Search by TM ID 25 All

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-P2TM2MV5CKI	1702172916485455948	TM2	1715580860223058042	24/10/2024 , 10:59	24/10/2024 , 10:59	Pending at TM	

« Previous 1 Next »

16

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.

PE-TM Chain

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

Search Show Records Status Download Report New Request

Search by TM ID 25 All

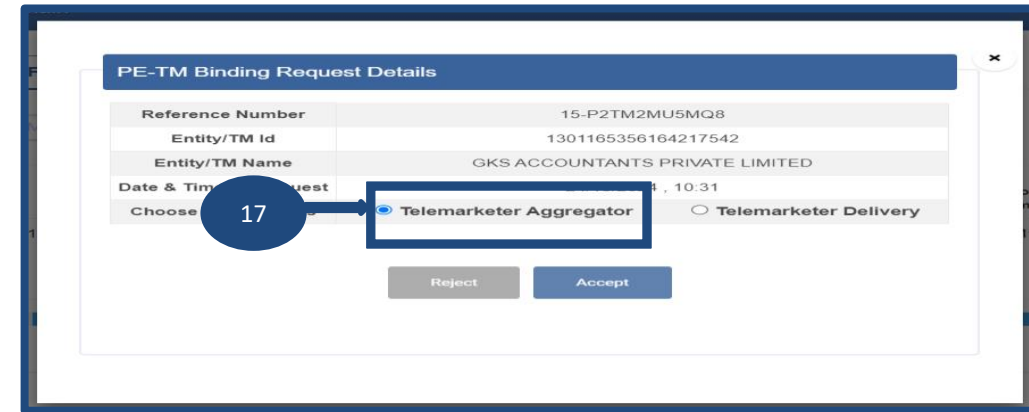
Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Chain Name	Approver Role	Date & Time of Request	Date & Time of Last Updated	Status	Chain Flow
1	15-P2TM2MV5CKI	1702172916485455948	TM2	1715580860223058042	-	TM-A	24/10/2024 , 10:59	24/10/2024 , 10:59	Chain in-process	

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

Request approve by TM

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.

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



PE-TM Binding Request Details	
Reference Number	15-P2TM2MU5MQ8
Entity/TM Id	1301165356164217542
Entity/TM Name	GKS ACCOUNTANTS PRIVATE LIMITED
Date & Time	10:31
Choose	<input checked="" type="radio"/> Telemarketer Aggregator <input type="radio"/> Telemarketer Delivery
<div>Reject</div> <div>Accept</div>	





"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."

18 

Request approve by TM

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

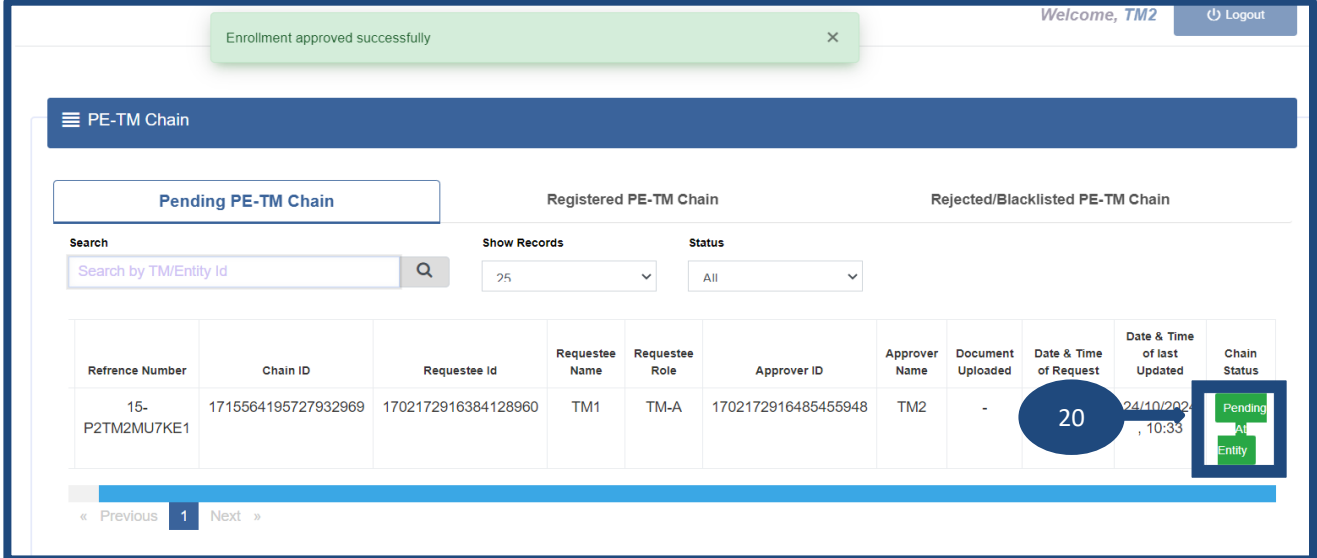
20 The status will change to “Pending at Entity” in the PE TM Chain Section.
The Request will go to the entity for final Approval of the chain.



PE-TM Binding Request Details

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	<input type="radio"/> Telemarketer Aggregator <input checked="" type="radio"/> Telemarketer Delivery

19 **Accept**



Enrollment approved successfully

Welcome, TM2 [Logout](#)

PE-TM Chain

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

Search:

Show Records: Status:

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-P2TM2MU7KE1	1715564195727932969	1702172916384128960	TM1	TM-A	1702172916485455948	TM2	-	24/10/2024 , 10:32	24/10/2024 , 10:32	Pending at Entity

« Previous 1 Next »

Request approval/rejection by Entity

21

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

22

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

PE-TM Chain

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

Search: Search by TM ID Show Records: 25 Status: All Download Report New Request

Sl. No.	Rf No.	TM ID	TM Name	Chain ID	Chain Name	Approver Role	Date & Time of Request	Last Updated	Status	Chain Flow
1	15-LFNM39UBVH8	1702172916384128960	TM1	1715474328963968605	Test only	TM-D	09/11/2024 , 12:54	09/11/2024 , 12:55	Pending final approval	
2	15-LFNM39UAHJU	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	

PE-TM Chain CHAIN ID: 1715564195727932969

View workflow details:*

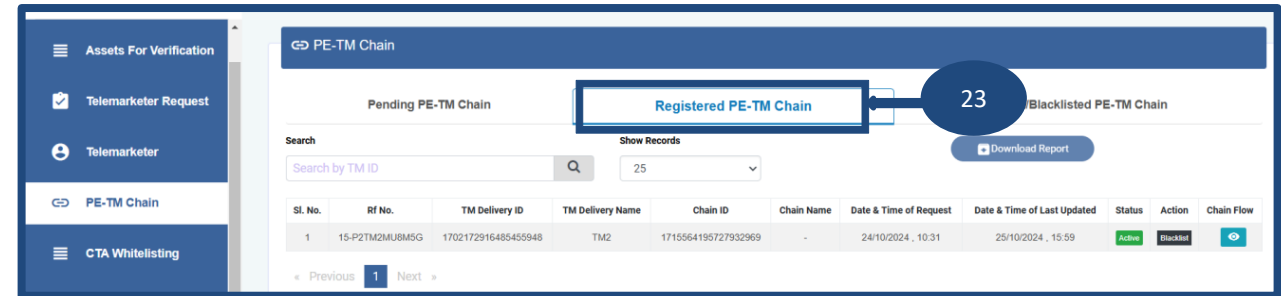
S No.	TM ID	TM Name	Role	Date & Time of Request	Date & Time of Last Updated	Status	Doc Uploaded
1	1702172916384128960	TM1	TM-A	24/10/2024 , 10:31	24/10/2024 , 10:32	Approved	-
2	1702172916485455948	TM2	TM-D	24/10/2024 , 10:32	24/10/2024 , 10:33	Approved	-

Reject Approve

Entity Registered and Rejected/Blacklisted PE-TM Chain Section

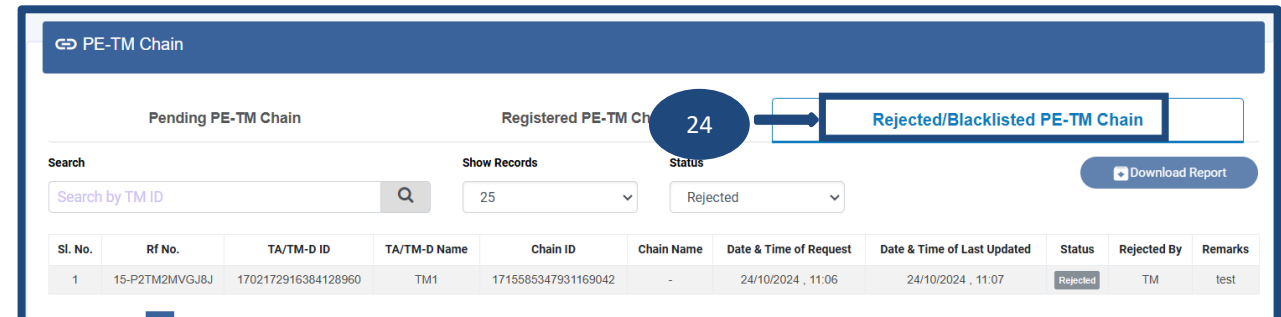
23

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



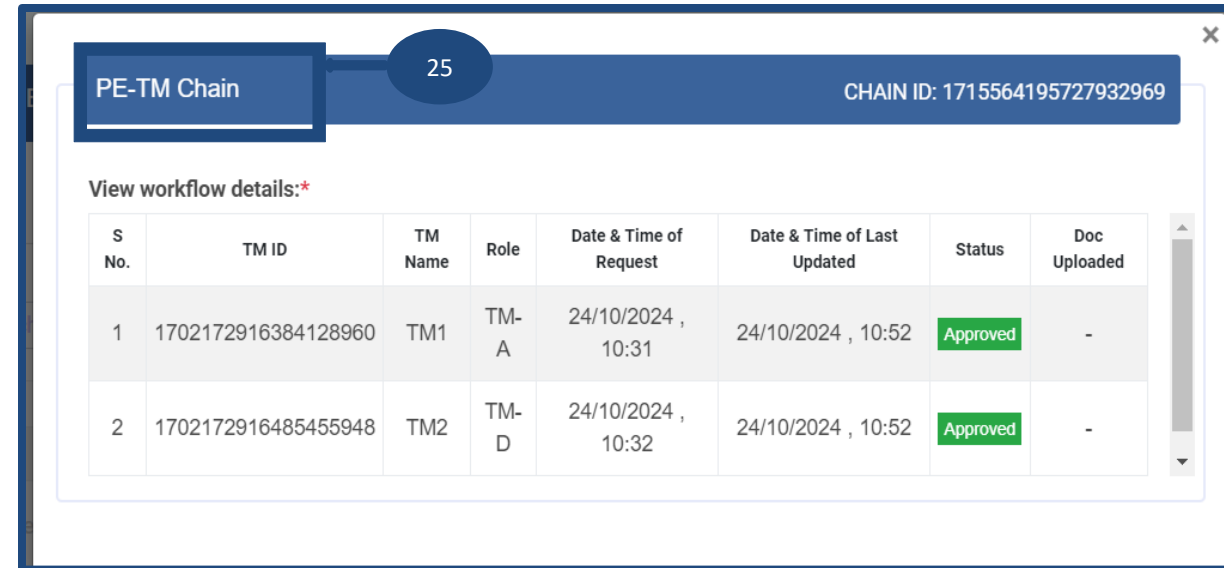
24

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

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



PE-TM Chain 25 CHAIN ID: 1715564195727932969

View workflow details:*

S No.	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.

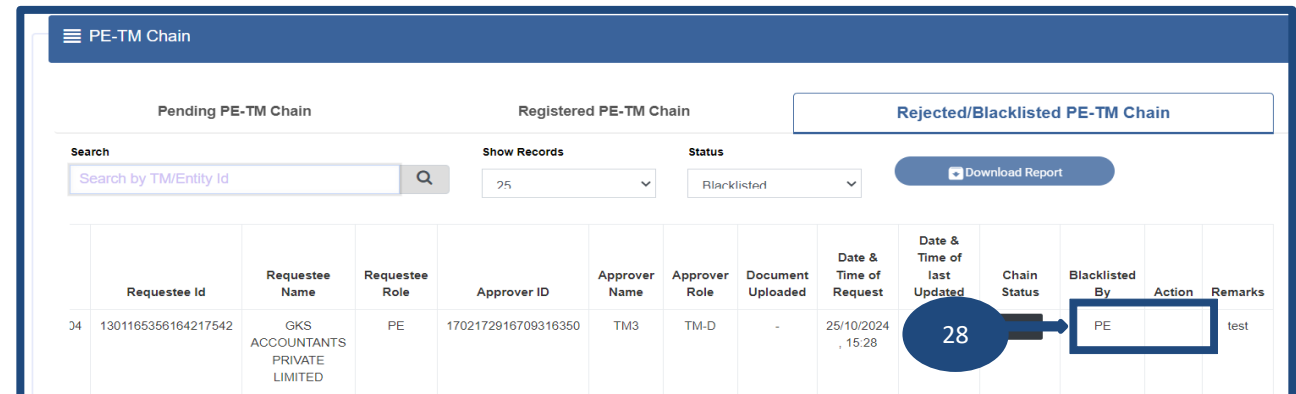
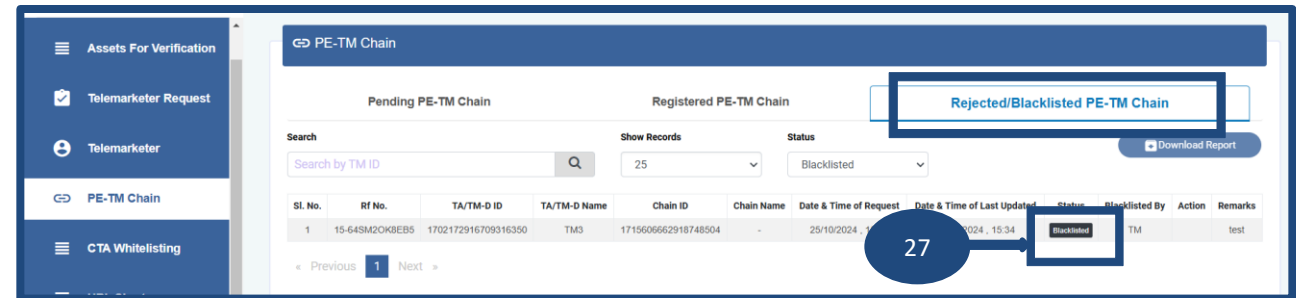
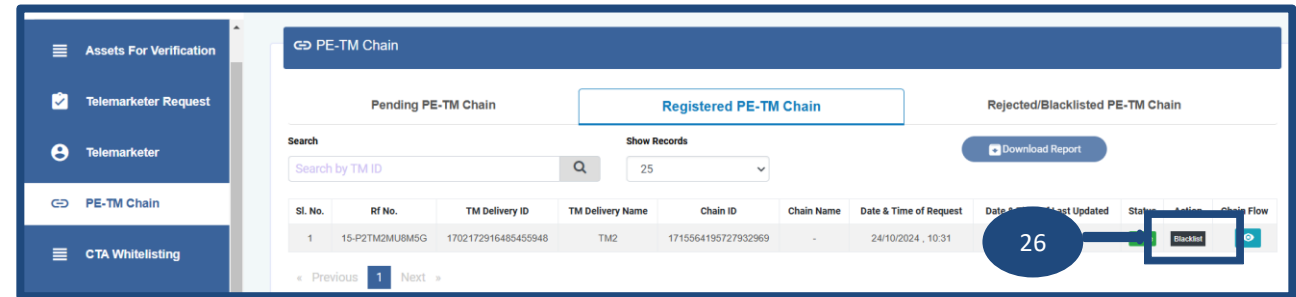
Chain Blacklisted by Entity

26 The Entity can blacklist an active chain by clicking on the Blacklist button under the action column.

27 The Blacklisted request will go under Rejected/Blacklisted PE-TM Chain section with chain status as “Blacklisted” on the entity panel.

28 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.



Chain Blacklisted by TM

- 29 The TM can blacklist an active chain by clicking on the Blacklist button under the action column.
- 30 The Blacklisted request will go under Rejected/Blacklisted PE-TM Chain section with chain status as “Blacklisted” on the TM panel.
- 31 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.

PE-TM Chain

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

Search Show Records 25 Download Report

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	Chain Flow
606662918748504	1301165356164217542	GKS ACCOUNTANTS PRIVATE LIMITED	PE	1702172916709316350	TM3	TM-D	-	25/10/2024, 15:34	25/10/2024, 15:34	Active	Blacklist	View

PE-TM Chain

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

Search Show Records 25 Status Blacklisted Download Report

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	Blacklisted By	Action	Remarks
4 1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916709316350	TM3	TM-D	-	25/10/2024, 15:34	25/10/2024, 15:34	Blacklist	TM	Whitelist	test

PE-TM Chain

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

Search Show Records 25 Status Blacklisted Download Report

Sl. No.	RF No.	TA/TM-D ID	TA/TM-D Name	Chain ID	Chain Name	Date & Time of Request	Date & Time of last Updated	Chain Status	Blacklisted By	Action	Remarks
1	15-64SM2OK9EB5	1702172916709316350	TM3	1715606662918748504	-	25/10/2024, 15:34	25/10/2024, 15:34	Blacklist	TM		test

« Previous 1 Next »

Chain Whitelisted by Entity

32 The Entity can Whitelist the blacklisted chain by clicking on the “Whitelist” button under the action column.

PE-TM Chain

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

Search Show Records Status Download Report

Search by TM ID 25 Blacklisted

Sl. No.	Rf No.	TA/TM-D ID	TA/TM-D Name	Chain ID	Chain Name	Date & Time of Request	Date & Time of Last Updated	Status	Blacklisted By	Action	Remarks
1	15-64SM2OK8EB5	1702172916709316350	TM3	1715606662918748504	-	25/10/2024, 15:28	25/10/2024, 15:34	Blacklisted	TM	Whitelist	test
2	15-P2TM2MU8M5G	1702172916485455948	TM2	1715564195727932969	-	24/10/2024, 10:31	09/11/2024, 12:41	Blacklisted	PE	Whitelist	test

Previous 1 Next

33 The Whitelisted chain will become active and visible under the registered PE-TM Chain section, with the chain status “Active” on the entity panel.

PE-TM Chain

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

Search Show Records Download Report

Search by TM ID 25

Sl. 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 Flow
1	15-P2TM2MU8M5G	1702172916485455948	TM2	1715564195727932969	-	24/10/2024, 10:31	09/11/2024, 12:41	Active	Active	View

Previous 1 Next

34 When the Entity has whitelisted the chain, it will be visible under the registered section on the TM panel with the status “Active”.

PE-TM Chain

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

Search Show Records Download Report

Search by TM/Entity Id 25

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	Chain Flow
564195727932969	1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916384128960	TM1	TM-A	-	25/10/2024, 15:28	25/10/2024, 15:34	Active	Blacklist	View

Chain Whitelisted by TM

35 The TM can Whitelist a blacklisted chain by clicking on the “Whitelist” button under the action column.

36 The Whitelisted chain will become active and visible under the registered PE-TM Chain section, with the chain status “Active” on the TM panel.

37 When TM has whitelisted the chain, it will be visible under the registered section on the Entity panel with the status “Active”.

The screenshot shows the 'PE-TM Chain' interface with three tabs: 'Pending PE-TM Chain', 'Registered PE-TM Chain', and 'Rejected/Blacklisted PE-TM Chain'. The 'Rejected/Blacklisted PE-TM Chain' tab is active. A search bar and 'Show Records' dropdown are visible. A table lists chain details, including Requestee Id, Name, Role, Approver ID, Name, Role, Document Uploaded, Date & Time of Request, Date & Time of Last Updated, Chain Status, Blacklisted By, Action, and Remarks. A callout box highlights the 'Whitelist' button in the Action column for a specific chain.

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	Blacklisted By	Action	Remarks
1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916384128960	TM1	TM-A	-	24/10/2024, 10:31	25/10/2024, 15:2	TM	TM	Whitelist	test

The screenshot shows the 'PE-TM Chain' interface with the 'Registered PE-TM Chain' tab active. The table now shows the chain with a status of 'Active' and a 'Chain Flow' icon. A callout box highlights the 'Active' status.

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	Chain Flow
564195727932969	1301165356164217542	GKS ACCOUNTANTS PRIVATE	PE	1702172916384128960	TM1	TM-A	-	24/10/2024, 10:31	25/10/2024, 15:54	Active	Blacklist	View

The screenshot shows the 'Entity panel' with a sidebar containing 'Assets For Verification', 'Telemarketer Request', 'Telemarketer', 'PE-TM Chain', and 'CTA Whitelisting'. The 'PE-TM Chain' section is active, showing a table with columns: Sl. No., Rf No., TM Delivery ID, TM Delivery Name, Chain ID, Chain Name, Date & Time of Request, Date & Time of Last Updated, Chain Status, and Chain Flow. A callout box highlights the 'Active' status.

Sl. No.	Rf No.	TM Delivery ID	TM Delivery Name	Chain ID	Chain Name	Date & Time of Request	Date & Time of Last Updated	Chain Status	Chain Flow
1	15-P2TM2MUM5G	1702172916485455948	TM2	1715564195727932969	-	24/10/2024, 10:31	25/10/2024, 15:54	Active	View

Thank You !