

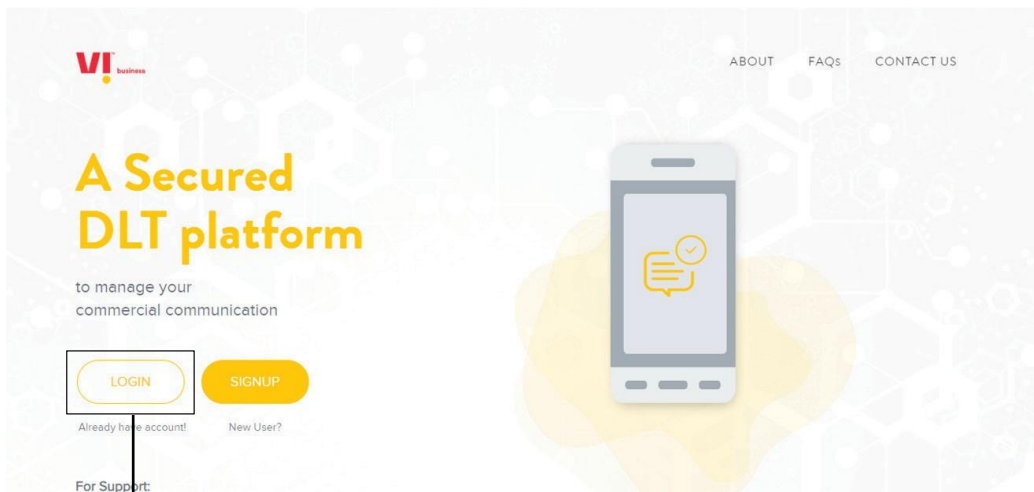


Entity

Content Templates User Manual

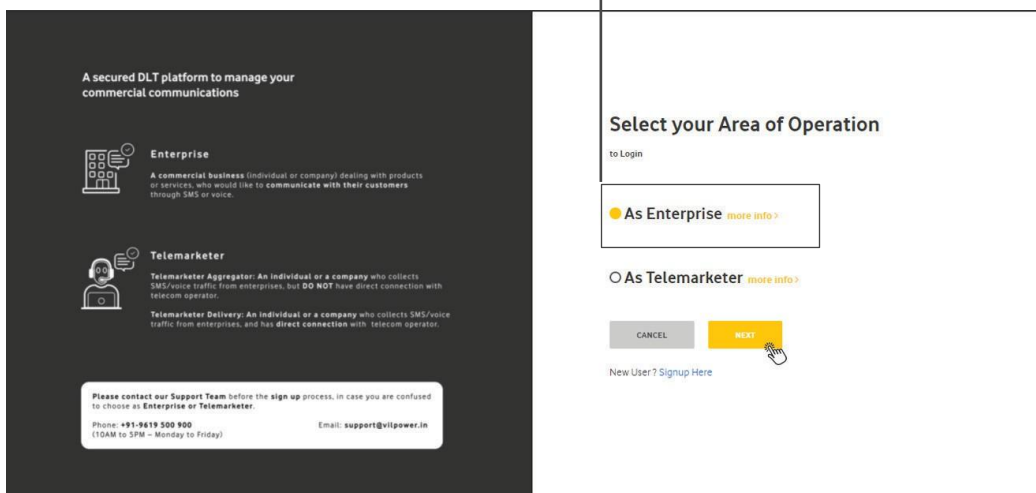


It would be perfect if you perused the manual before starting your journey as an entity to accomplish distinct duties in the implementation.



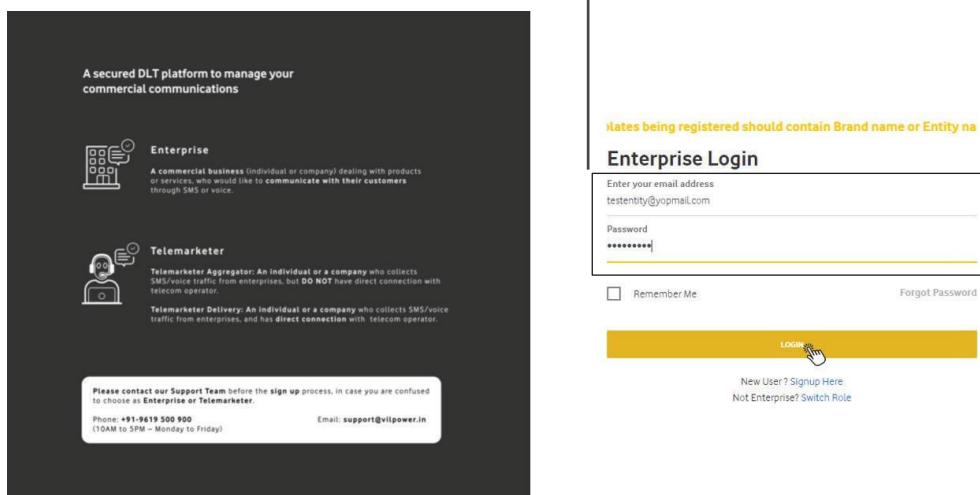
1. Click on Login.

2. Select the area of operation as enterprise & click on next.

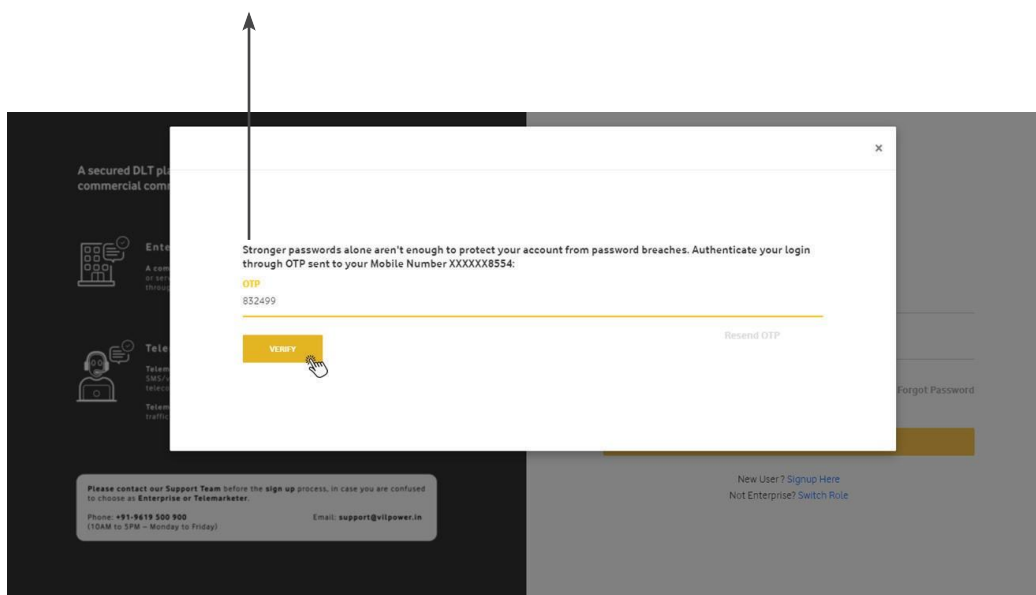


3. Enter your email id and password to login.

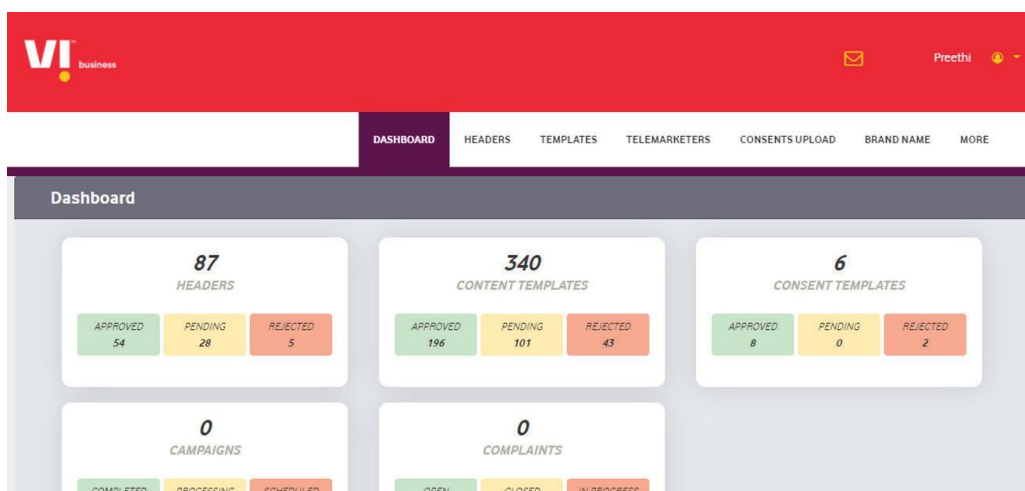
Email id: adbcd@gmail.com
Password: Xxxxxx@123xxx



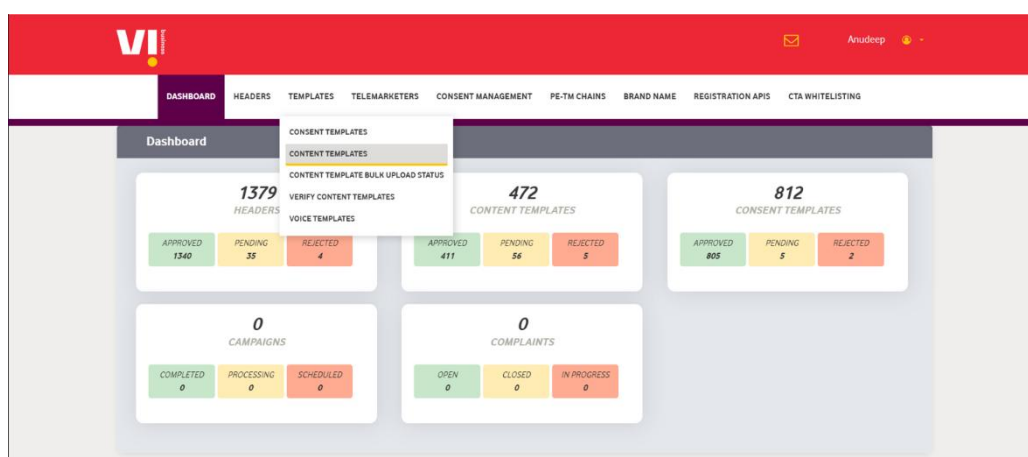
4. Authenticate the login through OTP generated to the registered mobile number.



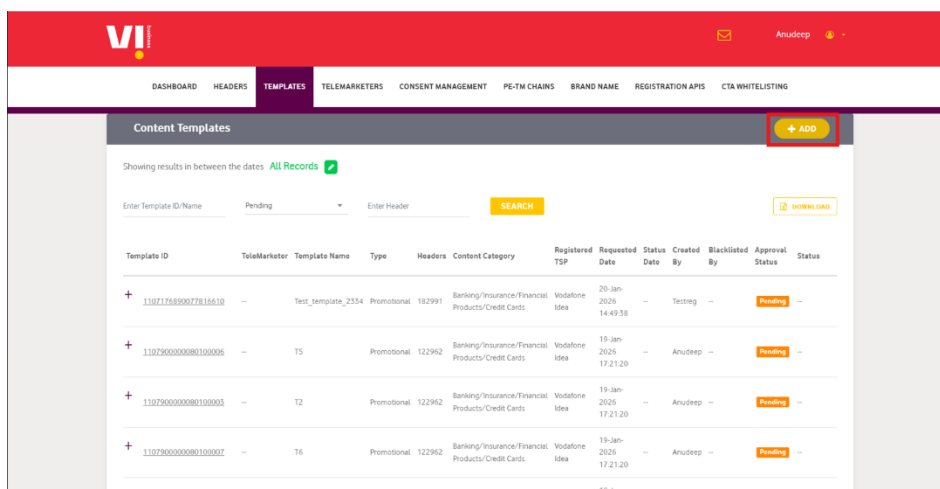
5. View the Dashboard to see all the registered headers count, templates count etc.



6. Click on Content template for registration.



7. Click on + Add for registering a new template.



8. Creating a new template:

Add Content Template

Template Type
 Promotional Transactional Service

Category
 Select Category *

Header
 Search Header *

Message Text Type
 Text

Brand Name
 Select Brand

Line of Business
 Select LOB

Template Type *
 Single Bulk

Template Name *

Follow the steps below to configure a new message template. Ensure all mandatory fields are completed before saving.:

- a. **Select Template Type:** Choose the appropriate classification for your message
 - **Promotional:** “Promotional Message” means the commercial communication containing promotional material or an advertisement of a product or service. Promotional SMSs are sent to the Non DND numbers.

- **Transactional:** Transactional communication” means a communication triggered by a transaction performed by the Subscriber and sent within a short period (typically within 30 minutes) of the transaction being performed.
 - Transactional category now includes OTPs not only from banks/financial entities but also from non-bank entities such as e-commerce platforms, apps, and other online services
 - It is directly related to:
 - Banking transactions alert
 - OTPs from Banks or non-banking entities
 - Balance alerts post completion of a transaction
 - OTP's for E-commerce/App logins.
 - Refund information alert.
 - **Service Implicit:** Service Message or Service Voice Call” means a message sent or voice call made by a Sender to its customer/subscriber to provide information pertaining to an ongoing product or service availed by the customer.
 - Messages critical to service delivery and directly related to the customer’s existing relationship like service, its warranty, product recall, software upgrade alerts, safety or security
 - It also includes periodic balance alerts, information regarding delivery of goods or services, and such Messages are not promotional in nature
 - **Service Explicit:** Will be considered as Promotional going forward (Implementation timeline will be communicated in future)
- b. **Choose Category:** Select the industry category that best matches your business usage or the specific campaign.
- c. **Select a header from list of approved headers**
- d. **Message type**
- Text: Standard English characters.
 - Regional: For messages containing local language characters or Unicode
- e. **Select Brand Name:** Select the associated Brand Name from the drop-down list
- f. Select LOB from the drop-down list (Optional)
- g. **Template Name & Template Message can be filled in two ways:** Choose your preferred method for inputting the Template Name and Message:
- Single – Select this to manually input a unique Template Name and Message for a single record.
 - Bulk – Select this to upload multiple template messages simultaneously using the same Header.
- h. **How to create a Single Template Message:**
- As per new TRAI guidelines, use any of the 6 variables to create a template message.

Template Type *

Single Bulk

Template Name *

Template Message * [View Variables Description](#)

Insert variables: {#numeric#} {#url#} {#urlott#} {#cbn#} {#email#} {#alphanumeric#}

Generate with AI Translate Recommendations

Template Score Generate Score

i. **How to use Variables?**

All new SMS templates can use any of these 6 variables that specify its data type and intended usage.

{#numeric#}

- Usage: Strictly for numeric values such as OTPs, transaction amounts, counts.
- Example Value: 748392
- Maximum Character limit: 40 Characters
- Sample Template Message: Your OTP is {#numeric#}.

{#alphanumeric#}

- Usage: Used for mixed values containing letters and numbers like reference IDs, ticket numbers, addresses, etc.
- Example Value: SRV9821AB or 11B Worli Mumbai
- Maximum Character limit: 40 Characters
- Sample Template Message: Your service request ID is {#alphanumeric#}.

{#url#}

- Usage: Used for website URLs such as tracking links or portals.
- Example Value: <https://track.company.com/order123>
- Maximum Character limit: 40 Characters
- Sample Template Message: Track your order here {#url#}

{#urlott#}

- Usage: Used for OTT links or mobile application download links.
- Example Value: <https://wa.me/1XXXXXXXXXX>
- Maximum Character limit: 40 Characters
- Sample Template Message: Download our app from {#urlott#} to manage your account.

{#cbn#}

- Usage: Used for callback or support contact numbers, No special characters are allowed.
- Example Value: 1800123456

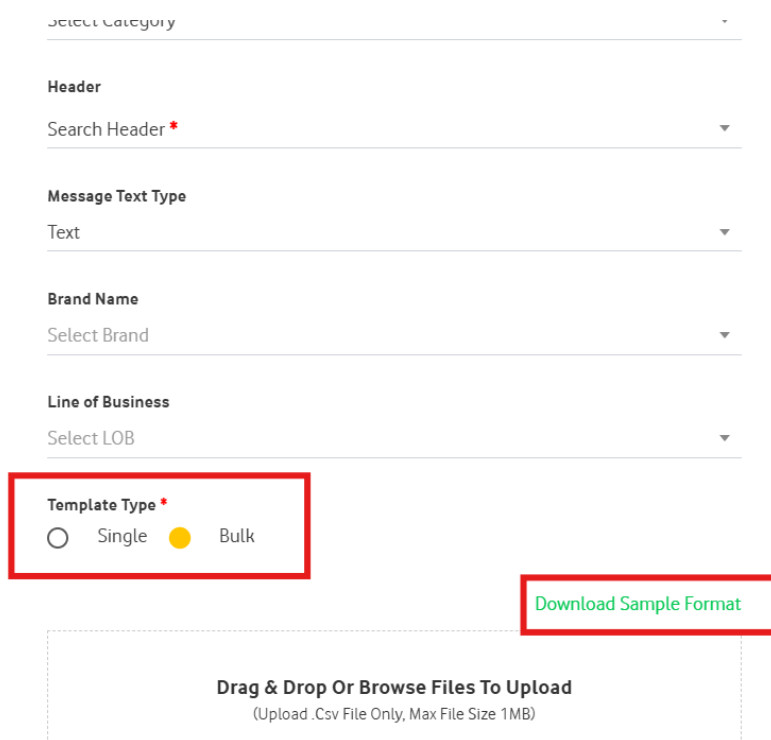
- Maximum Character limit: 12 Characters
- Sample Template Message: For assistance, call us at {#cbn#}.

{#email#}

- Usage: Used for email addresses mentioned in SMS.
- Example Value: support@company.com
- Maximum Character limit: 40 Characters
- Sample Template Message: Write to us at {#email#}.

j. **How to create Bulk Template Messages linking to one header:**

- Select Bulk from the Template Type menu.
- Download the Sample Template.
- Prepare your file by following the format of the examples provided.
- Upload the prepared csv file and click on submit.



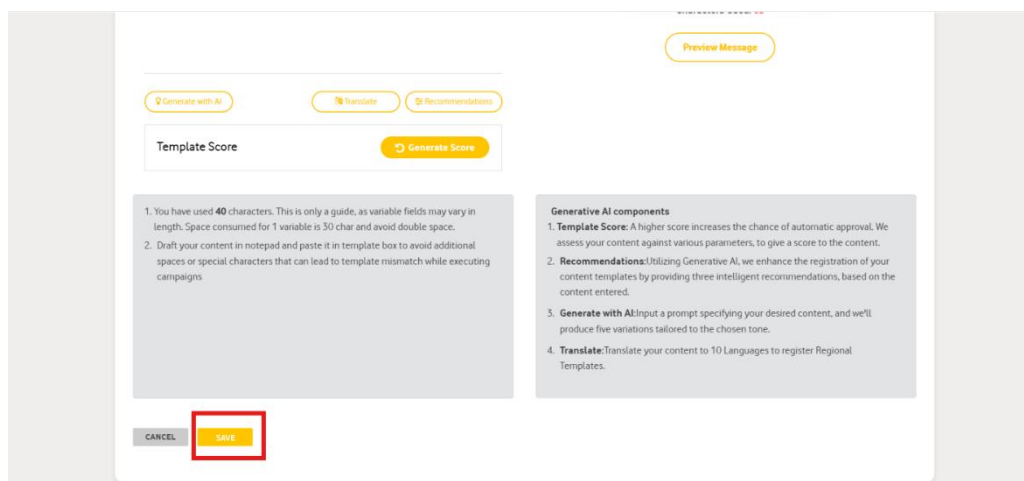
k. Here are few examples from the downloaded sample template:

Template Name	Template Message	Sample Message
Example 1 test_OTP_Verification_Login	Your OTP for login verification is {#numeric#}. This code is valid for {#numeric#} minutes. Do not share this OTP with anyone for security reasons.	Your OTP for login verification is 748392. This code is valid for 10 minutes. Do not share this OTP with anyone for security reasons.
Example 2 test_Order_Confirmation_Delivery	Dear {#alphanumeric#}, your order {#alphanumeric#} has been confirmed and is scheduled for delivery on {#alphanumeric#}. Track your order here: {#url#}. For support call us at {#cbn#} or email {#email#}.	Dear John Smith, your order ORD-2026-XYZ123 has been confirmed and is scheduled for delivery on 25-Jan-2026. Track your order here: https://track.example.com/order123 . For support call us at 18001234567 or email support@example.com.

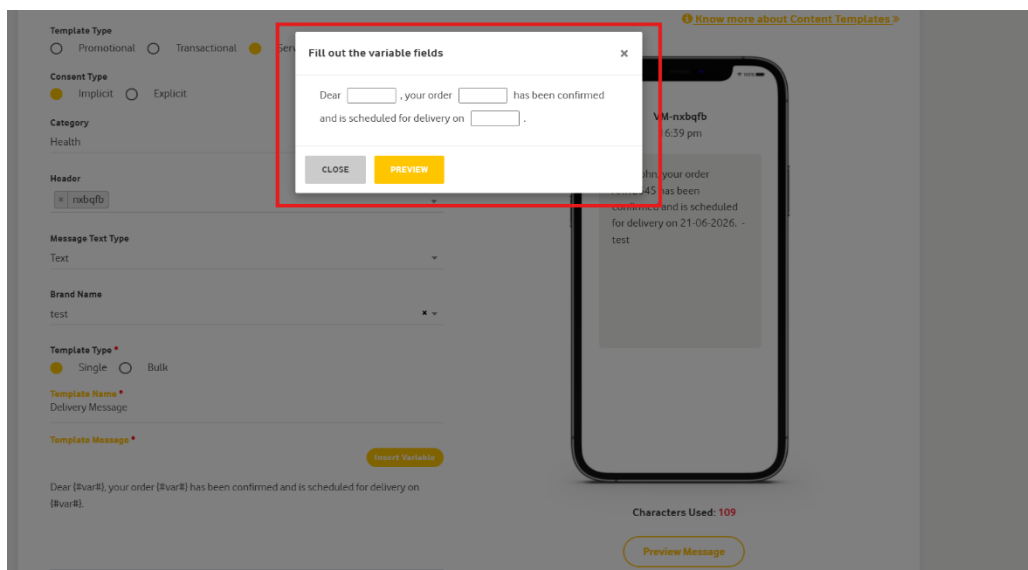
l. Use AI Components to enhance the template messages –

- **Generate score:** A higher score increases the chance of automatic approval. We assess your content against various parameters, to give a score to the content.
- **Generate with AI:** Get intelligent suggestions from AI based on the content entered.
- **Translate:** Translate your content to 10 Languages to register Regional Templates.
- **Recommendations:** Utilizing Generative AI, we enhance the registration of your content templates by providing three intelligent recommendations, based on the content entered.

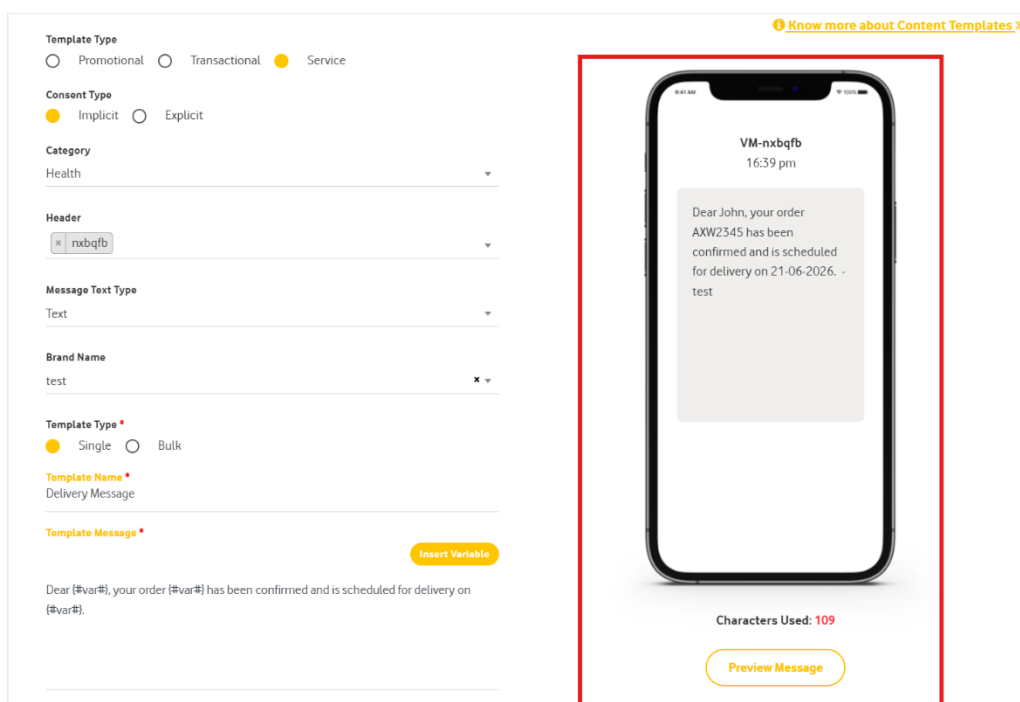
m. Click on Save and Enter Sample values for the chosen variables in template message and submit.



9. Fill out the variables fields to preview the message sent to user:



10. Preview the final message here:



New Template added successfully.

Content Templates + ADD

Showing results in between the dates **All Records** 2

Enter Template ID/Name Pending Enter Header SEARCH DOWNLOAD

Template ID	TeleMarketer	Template Name	Type	Headers	Content Category	Registered TSP	Requested Date	Status Date	Created By	Blacklisted By	Approval Status	Status
+ 1107176899335171424	--	Promotional Messgae	Promotional	122211	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 16:32:32	--	Anudeep	--	Pending	--
+ 1107176898927042116	--	Test_sample_msg_01	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 15:24:30	--	Testreg	--	Pending	--
+ 1107176898781418724	--	Test_sample	Promotional	122211	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 15:00:14	21-Jan-2026 15:01:34	Testreg	--	Pending	--
+ 1107900000080400006	--	Test_template_07	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 11:21:01	--	Testreg	--	Pending	--

12. Check the template approval status after registration:

Content Templates + ADD

Showing results in between the dates **All Records** 2

Enter Template ID/Name Pending Enter Header SEARCH DOWNLOAD

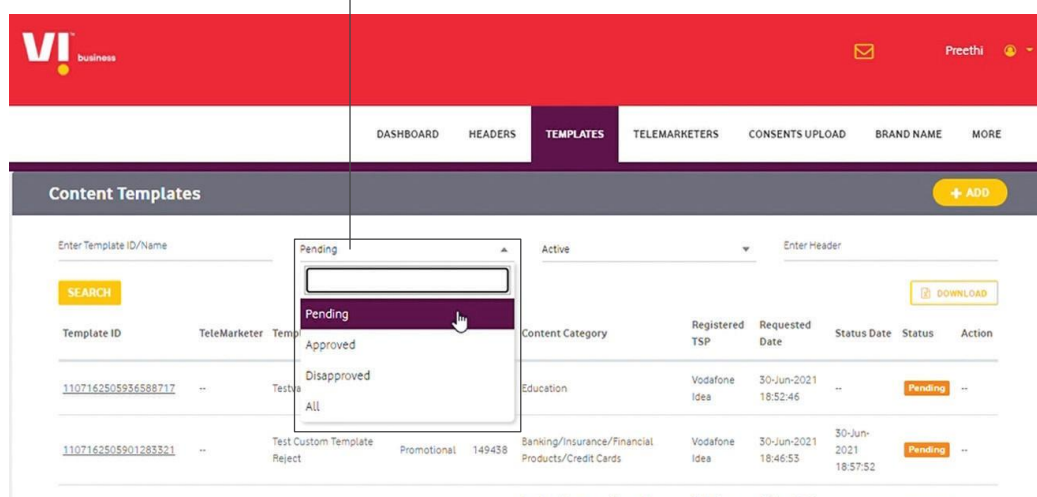
Template ID	TeleMarketer	Template Name	Type	Headers	Content Category	Registered TSP	Requested Date	Status Date	Created By	Blacklisted By	Approval Status	Status
+ 1107176899335171424	--	Promotional Messgae	Promotional	122211	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 16:32:32	--	Anudeep	--	Pending	--
+ 1107176898927042116	--	Test_sample_msg_01	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 15:24:30	--	Testreg	--	Pending	--
+ 1107176898781418724	--	Test_sample	Promotional	122211	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 15:00:14	21-Jan-2026 15:01:34	Testreg	--	Pending	--
+ 1107900000080400006	--	Test_template_07	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 11:21:01	--	Testreg	--	Pending	--
+ 1107900000080400005	--	Test_template_04	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 11:21:01	--	Testreg	--	Pending	--
+ 1107900000080400002	--	Test_template_03	Promotional	182991	Banking/Insurance/Financial Products/Credit Cards	Vodafone Idea	21-Jan-2026 11:21:01	--	Testreg	--	Pending	--

13. Click on the Template ID for detailed view of the template after submission

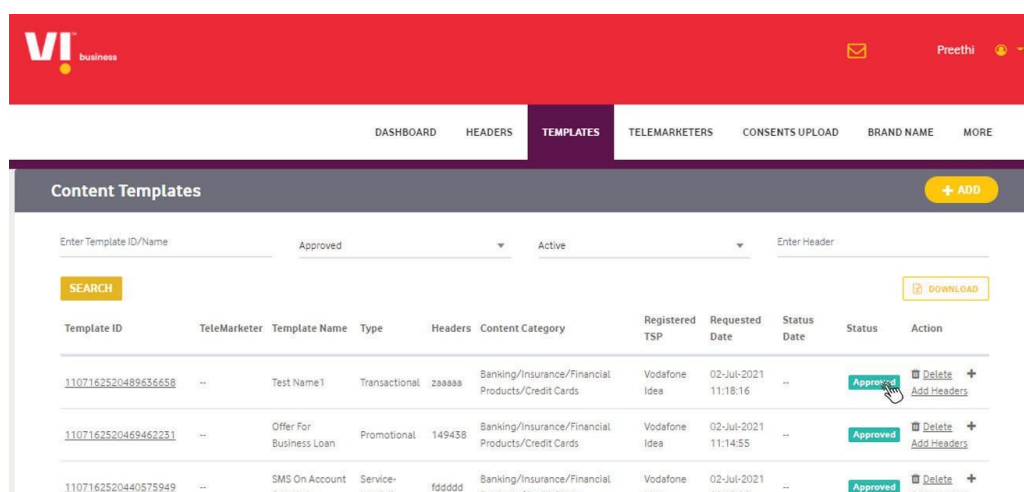
<table border="0"> <tr><td>Template ID:</td><td>1107176898927042116</td></tr> <tr><td>Telemarketer :</td><td>--</td></tr> <tr><td>Entity :</td><td>ABC Hotel</td></tr> <tr><td>Purpose of Registration :</td><td></td></tr> <tr><td>Template Type:</td><td>Promotional</td></tr> <tr><td>Message Type:</td><td>Regional</td></tr> <tr><td>Content Category:</td><td>Banking/Insurance/Financial products/credit cards</td></tr> <tr><td>Header(s):</td><td>182991</td></tr> <tr><td>Consent Template:</td><td>--</td></tr> <tr><td>Consent Brand Name :</td><td>--</td></tr> <tr><td>Scope of Consent :</td><td>--</td></tr> <tr><td>Brand Name:</td><td>--</td></tr> <tr><td>Content Template Type:</td><td>Custom</td></tr> <tr><td>Registered TSP:</td><td>Vodafone Idea</td></tr> <tr><td>Status:</td><td>--</td></tr> <tr><td>Created By:</td><td>testreg</td></tr> <tr><td>Blacklisted By:</td><td>--</td></tr> <tr><td>Blacklisted On:</td><td>--</td></tr> <tr><td>Line of Business:</td><td>TestNewBrand</td></tr> </table>	Template ID:	1107176898927042116	Telemarketer :	--	Entity :	ABC Hotel	Purpose of Registration :		Template Type:	Promotional	Message Type:	Regional	Content Category:	Banking/Insurance/Financial products/credit cards	Header(s):	182991	Consent Template:	--	Consent Brand Name :	--	Scope of Consent :	--	Brand Name:	--	Content Template Type:	Custom	Registered TSP:	Vodafone Idea	Status:	--	Created By:	testreg	Blacklisted By:	--	Blacklisted On:	--	Line of Business:	TestNewBrand	<div style="background-color: #333; color: white; padding: 5px; text-align: center; font-weight: bold;">CONTENT TEMPLATE PREVIEW</div> <p>Template Name:</p> <input type="text" value="test_sample_msg_01"/> <p>Template Message:</p> <input type="text" value="यह नमूना संदेश है (#numeric#)"/> <div style="border: 1px solid #ccc; padding: 5px; font-size: small;"> <p>i You have used 29 characters. This is only a guide, as variable fields may vary in length. Space consumed for 1 variable is 50 char and avoid double space.</p> </div>
Template ID:	1107176898927042116																																						
Telemarketer :	--																																						
Entity :	ABC Hotel																																						
Purpose of Registration :																																							
Template Type:	Promotional																																						
Message Type:	Regional																																						
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Status:	--																																						
Created By:	testreg																																						
Blacklisted By:	--																																						
Blacklisted On:	--																																						
Line of Business:	TestNewBrand																																						

14. Filter & View templates based on approval status:

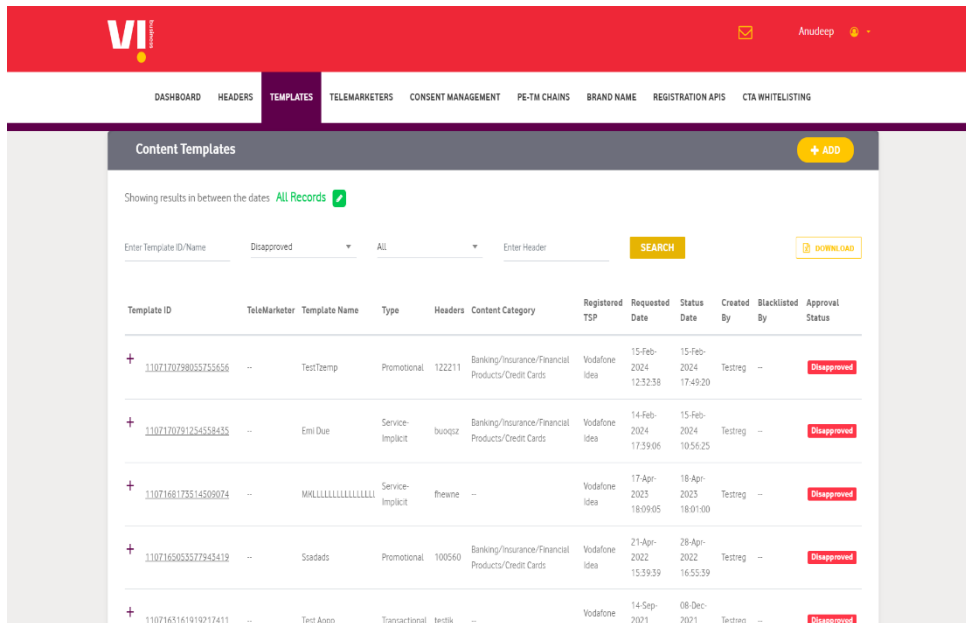
Pic 1: Select a status from the dropdown menu



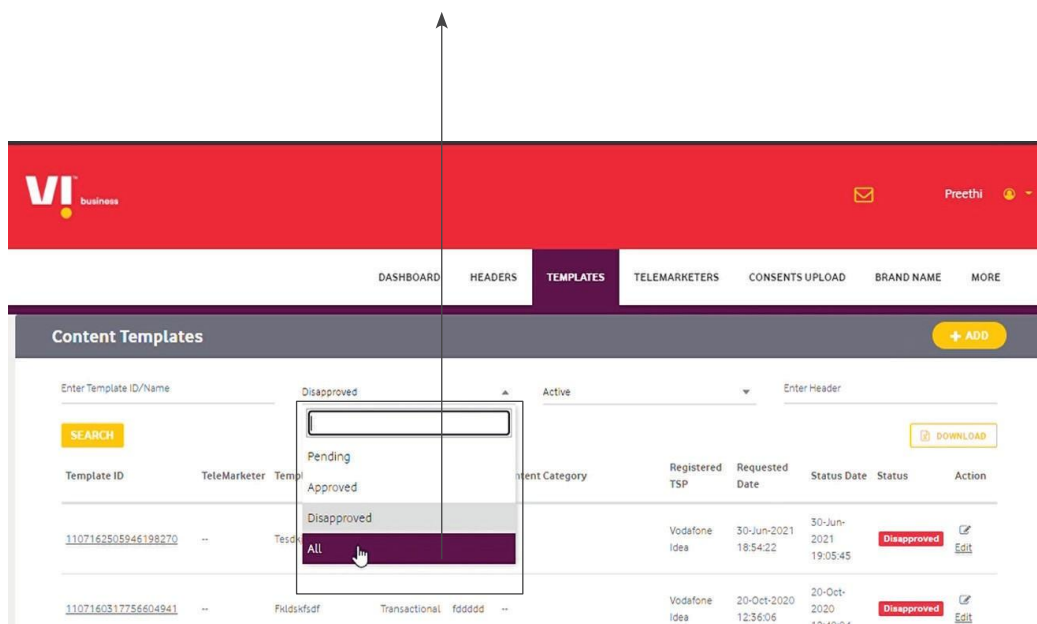
Pic 2: Approved templates.



Pic 3: Disapproved templates



Pic 4: Customer wants to view all Content Templates.



Thank you