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Alaris Campaign Portal

Admin Panel User's Guide

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1 Terms and Acronyms

Term	Definition
Administrator (also referred to as System owner)	Company providing message delivery services to other entities. This client holds a license for the *Alaris Campaign Portal 2.0* product and serves as the primary entity responsible for creating partners and users within the System. System owners can be wholesale or large retail telecommunications operators.
Admin Panel (AP)	Web application designed for configuring and administering the System, accessible exclusively to System owners and Resellers.
Alaris Campaign Portal (also referred to as ALCP or the System)	Platform for configuring, administering, and executing SMS or instant messaging (IM) campaigns. Comprises two components: *Admin Panel (Administrator Panel)* and *Campaign Portal (Client Portal)*.
Campaign	Mass message distribution targeting a predefined contact list.
Campaign Portal (CP)	Web application intended for executing campaigns conducted by end users.
Cascade Campaign	Multi-channel distribution (SMS/IM) where undelivered messages trigger sequential retries through alternate channels after a specified time-to-live (TTL). Increases message delivery success rates. Campaign executors can adjust channel sequence and TTL values. Message content may vary across channels within a single campaign.
Contract company	Legal entity on whose behalf the System owner or Reseller operates within the System.
Client	A company that needs to inform its own potential or actual customers about discounts, sales or marketing campaigns, wish happy holidays or otherwise communicate with them.
Delivery Channel	Channel for message or content delivery (SMS, IM).
EDR	Detailed record of a message delivery attempt.

Term	Definition
IM (Instant Messaging)	Technology for exchanging text, images, videos, or files (including WhatsApp, Viber, Telegram).
End User	Campaign Portal user directly executing campaigns for their clients.
Product	Parameter within rate configurations. Each rate is linked to a specific product, which includes attributes such as name, currency, and traffic type.
Endpoint	Connection endpoint for traffic routing and final delivery.
Flash messages	A special type of SMS messages that are displayed on the screen of a mobile device immediately upon receipt, usually without the need to press the "Read" button.
HLR (Home Location Register)	In mobile networks, it is a database that stores information about all subscribers connected to the operator. In the transit business, HLR provides information about the subscriber's current network and MCCMNC.
HLR dipping	Service for checking the status of mobile numbers. An HLR request allows determining the status of the client's phone number (active or out of service; in roaming or in the home network).
HLR proxy	A module that is designed to handle requests for MCCMNC retrieval by DNIS. It is managed through the Alaris HLR Configurator web interface.
MO (Mobile Originated)	Messages sent by the user from the mobile device to an application.
MT (Mobile Terminated)	Messages sent from an application to the user's mobile device.
Pack	Prepaid entity enabling a limited number of messages. Purchased once, messages are deducted during campaign execution. Packs are created in the *Admin Panel* and acquired in the *Campaign Portal*. Multiple packs may be purchased for the same delivery channel (SMS/IM). Also, packs

Term	Definition
	can be assigned to a partner in the Admin Panel, after which they will become available for the partner in Campaign Portal.
Partner	Entity representing a company in client interactions. The System supports three partner types: *System owner*, *Reseller*, and *End User*.
Plan	Entity providing message delivery rates for specific countries and networks. Plans are created in the *Admin Panel* and purchased in the *Campaign Portal*. Also, plans can be assigned to a partner in the Admin Panel, after which they will become available for the partner in Campaign Portal. If no pack exists for a destination, the System calculates message costs using the plan's rate and deducts them from the balance. Only one plan per delivery channel is permitted (e.g., one SMS plan, one Viber Promotion plan, one Viber Transaction plan).
Rate	Vendor-specific rate linked to a designated product. Rates exist only in combination with products.
Reseller	Company reselling traffic delivery services to other entities. Access is restricted to the *Admin Panel*, with no direct campaign distribution capabilities through the *Campaign Portal*. Resellers must create their own partners and users within the *Admin Panel* and may generate additional Resellers.
Reseller Plan	Rate plan designed for resellers. Resellers can generate new rate plans based on this template to resell services to their clients or sub-resellers. This plan is visible only to the System owner that created it and the Resellers directly assigned to it. A single *Reseller Plan* can be linked to an unlimited number of Resellers. To create a *Reseller Plan*, rates must first be available in the *Vendor Rates* interface. Resellers export these rates, compile custom price lists, create standard or reseller-type plans in the *Subscriptions* section, and upload the finalized price lists in .csv format. This allows Resellers to manage and resell services on their own terms while maintaining confidentiality of their rate structures.
Sender ID (SID)	Numeric or alphanumeric identifier for message senders, enabling recipient verification of sender

Term	Definition
	legitimacy. Campaign Portal users may submit SID registration requests to their superior partner. These requests escalate to the System owner for approval, after which the owner applies for SID registration with the relevant telecommunications operator.
Subscriptions	Rate plan, pack, or reseller plan.
System owner	Company that has purchased a license to Alaris Campaign Portal. Wholesale carriers as well as large retail operators can be System owners. System owners have an interconnection with a vendor carrier.
Vendor	Carrier to which the *Alaris Campaign Portal 2.0* System owner routes traffic.
Vendor Product	Entity functioning as a container for rates.

2 About Alaris Campaign Portal

The Alaris Campaign Portal (ALCP) is an intuitive white-label platform engineered to empower companies willing to engage customers through flexible, customized communication channels. It comprises two components: the Admin Panel (AP), which enables system configuration and management, and the Campaign Portal (CP), dedicated to executing and delivering campaigns.

This document provides a detailed overview of the Admin Panel. For instructions on utilizing the Campaign Portal, refer to the Alaris Campaign Portal User's Guide.

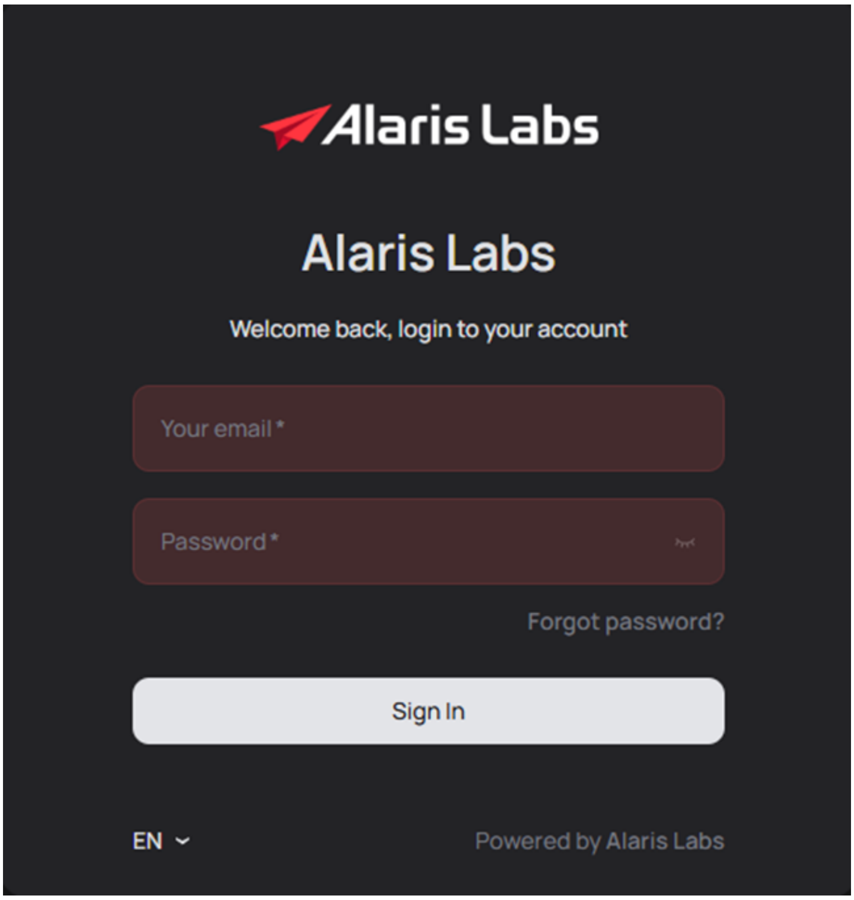
The Admin Panel is a web application that provides:

- Work with Partners (Partners 20 interface)
- Customize portals for Partners (Portals 16 interface)
- Handle subscriptions (Subscriptions 26 interface)
- Set up and edit vendor rate plans (Vendors 38 interface)
- Configure IM/SMS channel settings for vendors (Vendors 38 interface)
- Manage vendor pricing rates (Vendors 38 interface)
- Configure routing of messages to the appropriate channel (Vendors 38 Interface)
- Control Sender IDs for campaigns (Sender IDs 57 interface)
- View campaign analytics and dashboards (Statistics 64 and Dashboard 14 interface)
- Process payments and financial records (Finance 53 interface)
- Customize payment systems (Payment Systems 79 interface)
- Manage user access and permissions (Users&Roles 69 interface)
- Set up custom domains for shortened URLs (URL Shortener 72 interface)
- Customize the connection betwee the System and HLR Configurator products to get up-to-date information about clients' mobile numbers (HLR 86)
- Customize the registration form for new users (Form Customization 81)
- Customize the Sender ID request form (Form Customization 81)

3 Access to Alaris Campaign Portal

Access to the *Admin Panel* is granted based on the user role:

- System owners receive an access link and login credentials from Alaris Labs.
- Resellers receive an access link and login credentials from the System owner or higher level Resellers.

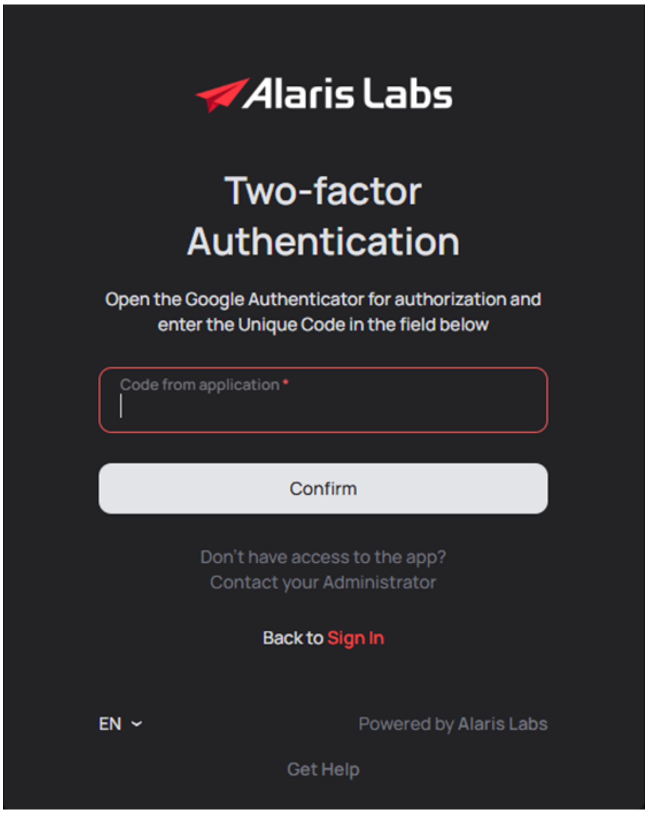


Admin Panel logon window

Two-Factor Authentication (2FA) can be enabled for the Admin Panel web interface with one-time passwords (OTPs) supported by the Google Authenticator application.

The 2FA process functions as follows:

1. The System owner or Reseller activates the 2FA feature by selecting the corresponding checkbox in the Portals 16 interface for a specific portal. Upon activation, the System generates a unique secret key (an alphanumeric code) and automatically emails it to all users associated with the portal. Users are instructed to add this code to their *Google Authenticator* application.
2. The user inputs the provided alphanumeric code into the *Google Authenticator* application.
3. After setup, when the user attempts to log in with their credentials (username/password), they will be prompted to enter a one-time password. This OTP is dynamically generated and displayed in the *Google Authenticator* app.

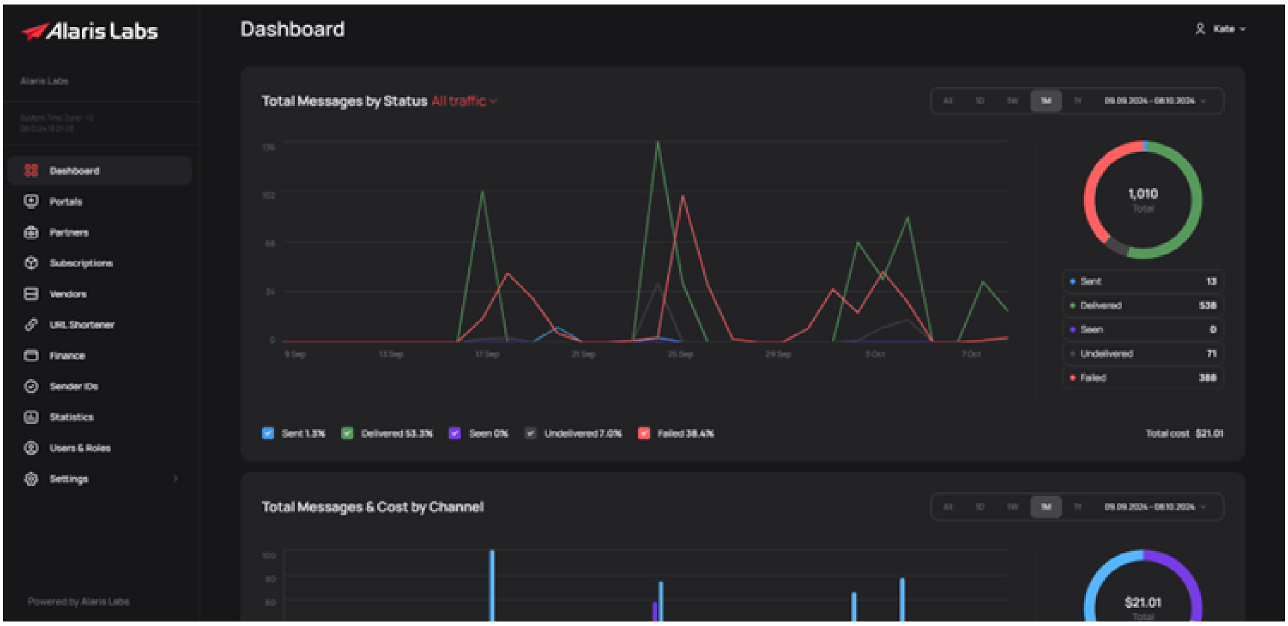


Admin Panel 2FA logon window

The System owner or Reseller can reset the secret code for a user in the Users & Roles 69 interface. Alternatively, users may reset their own secret code under *User Menu\Account Settings*.

Upon logging in, users are directed to the *Admin Panel's* main dashboard, which is divided into two sections:

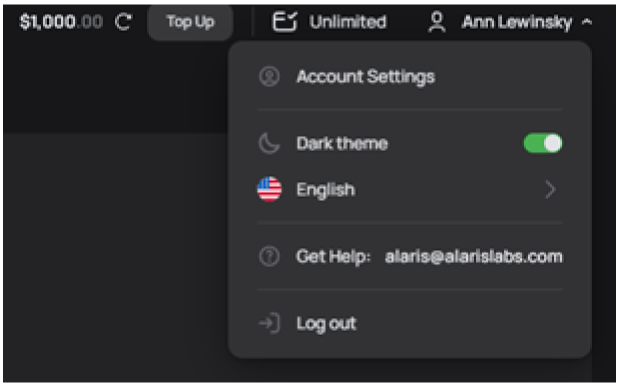
- Left-hand menu: displays the menu and account balance (visible exclusively to Resellers).
- Right-hand workspace: shows the content of the menu item selected in the menu.



Admin Panel Main Page

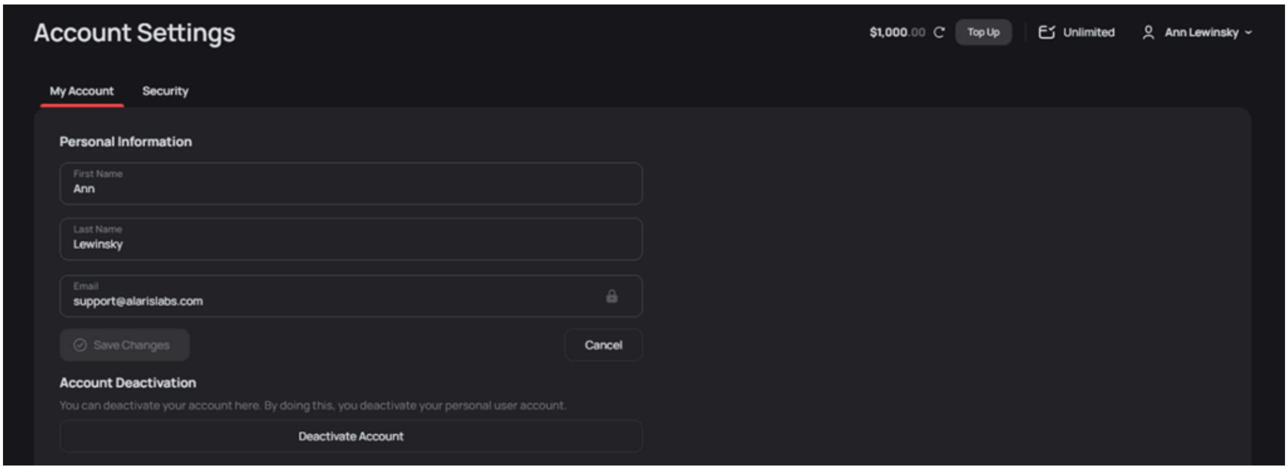
The *User Menu* settings are located in the top-right corner of the screen and include the following options:

- *Account Settings*: manage personal account details.
- *Theme*: adjust the application’s visual theme (Dark\Light).
- *Language*: select the preferred interface language.
- *Support Email*: view the email address for contacting a higher-level partner. This option appears only if the support email field was configured during portal setup.
- *Log Out*: sign out of the account.



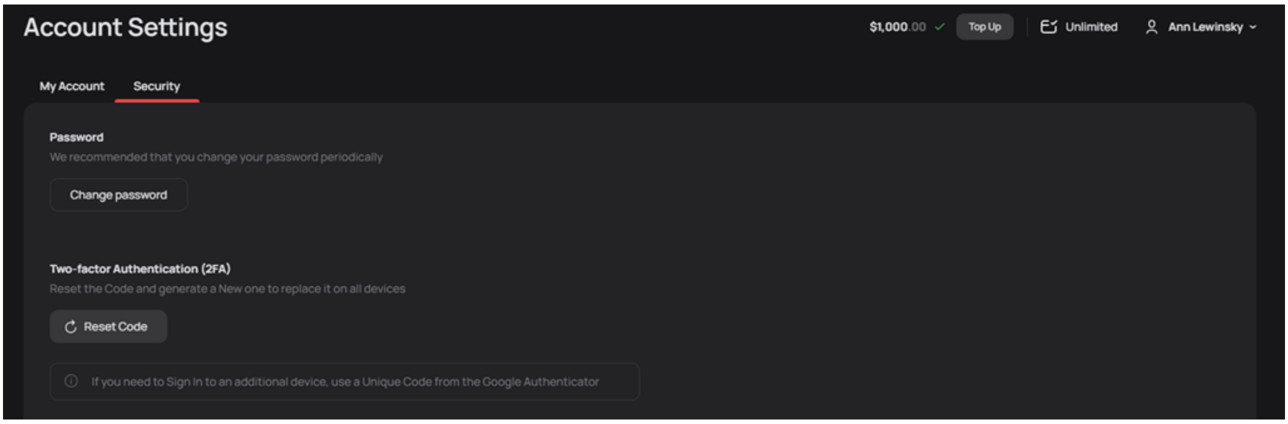
User Menu

In the *My account* tab of the *Account Settings*, the user can change their first name and last name:



Account Setting > My Account

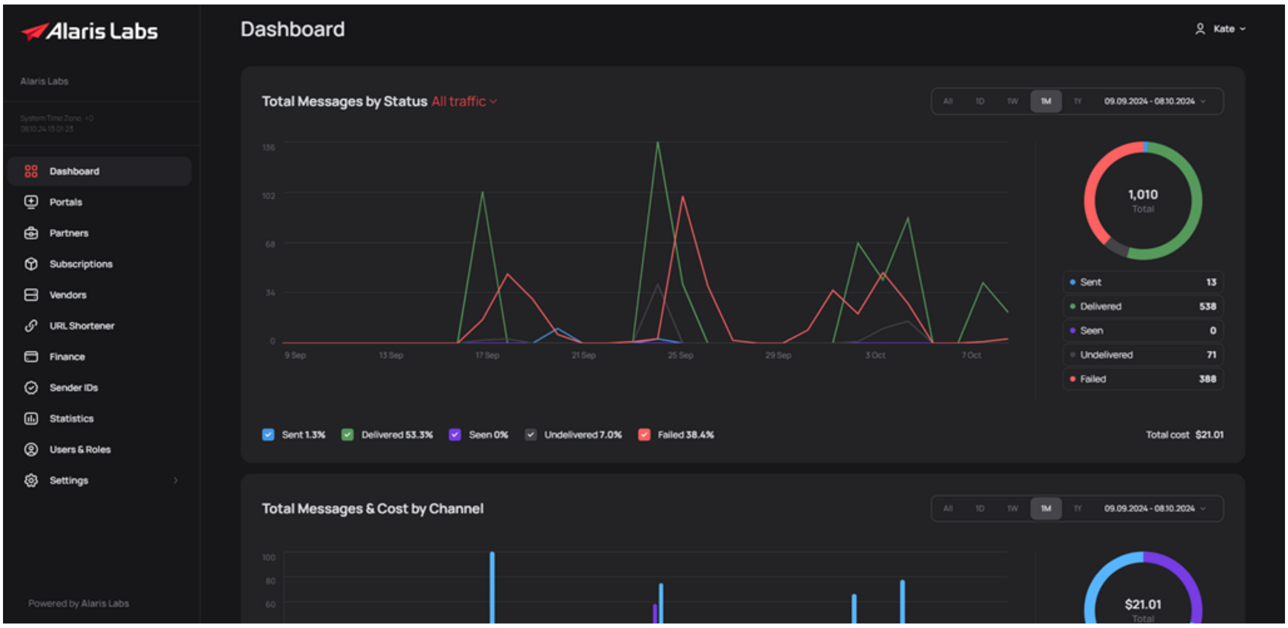
In the *Security* tab of the *Account Settings*, users can change their account password and, if 2FA has been enabled on the portal, generate a new code for *Google Authenticator* configuration.



Account Setting > Security

4 Dashboard

The *Dashboard* displays the message analytics detailed below.



Dashboard

The following analytics are available:

- *Total Messages by Status*: chart displaying the number of sent messages, categorized and filtered by status (*Sent, Delivered, Seen, Undelivered, Failed*). Includes filters for channel type (Default: *All traffic*) and period selection. Each status is highlighted with its own color for easy visual perception. The chart allows enabling/disabling the display of each status:
    - When a checkbox is enabled/disabled, the corresponding status is added to or removed from the chart.
    - Each checkbox displays the status name and its share of the total number of messages.

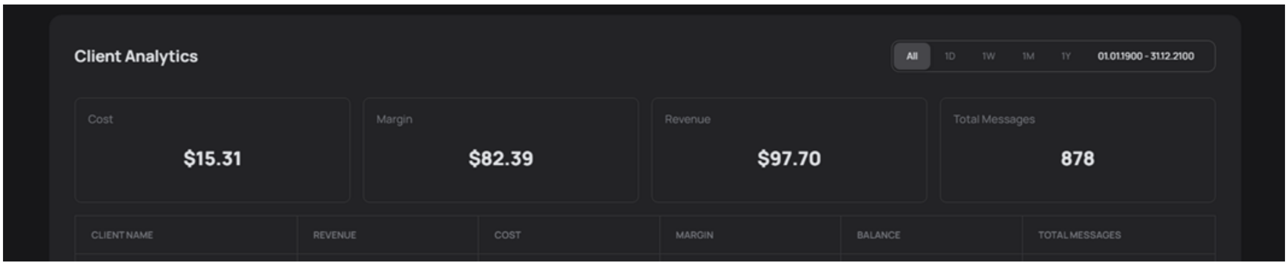
  The distribution of messages by status is displayed on the right side in the form of a ring diagram. *Total cost* shows the cumulative cost of all sent messages, with additional cost breakdowns per status.

- *Total Messages & Cost by Channel*: chart showing the cost and volume of sent messages, segmented by delivery channel (SMS/IM) with period selection. Each status is highlighted with its own color for easy visual perception. The chart allows enabling/disabling the display of each status:
    - When a checkbox is enabled/disabled, the corresponding channel is added to or removed from the graph.
    - Each checkbox displays the channel name and its share of the total number of messages.

  Total Sent shows the total number of sent messages. The distribution of messages by status is displayed on the right side in the form of a ring diagram. *Total* shows the cost of all sent messages.

- *Total MO Messages by Channel*: chart showing the number of received MO messages, segmented by delivery channel (SMS/IM), with period selection. The chart allows enabling/disabling the display of each channel:
  - When a checkbox is enabled/disabled, the corresponding channel is added to or removed from the graph.
  - Each checkbox displays the channel name and its share of the total number of messages.

  Total Received shows the number of all received messages.
- *Total MO Messages by Sender ID*: chart showing the number of received MO messages, segmented by Sender ID, with period selection.
- *Total Messages by Country*: chart summarizing the total number of sent messages, organized by country and adjustable by period. Vertical axis: country name; Horizontal axis: message count. To view the country name and sent message count, hover over the chart.
- *Total Messages by Network*: chart illustrating message volume across mobile networks, filterable by country. *Total* displays the aggregate sent message count, with further breakdowns per network. *Total* displays the number of all messages sent over the network of the selected country.
- *Total Messages by Client*: chart presenting the total message volume per partner, customizable by period. Vertical axis: partner name; Horizontal axis: message count. To view the partner name and sent message count, hover over the chart.
- *Total Messages by Sender ID*: chart detailing message volume associated with specific Sender IDs, adjustable by period. Vertical axis: Sender ID; Horizontal axis: message count. To view the Sender ID and sent message count, hover over the chart.
- *Client Analytics*: aggregated financial metrics for all partners:
  - Select a period or specify specific dates to display the data:

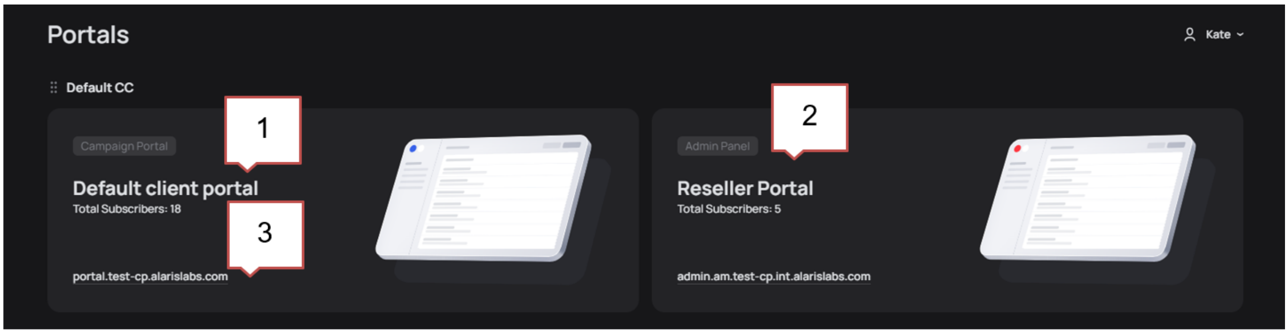


Client Analytics

5 Portals

The *Portals* interface enables creation, configuration, and customization of *Admin Panel* and *Campaign Portal*, linking them to legal entities (Contract Companies) of the System owner or Reseller.

The System is supplied with the *Default CC* (default contract company), representing the legal entity established during System deployment.



Portals

The interface displays portal records for all *Contract Companies* added in the Contract Companies 87 interface. Drag-and-drop functionality allows prioritizing frequently accessed portals. Each record displays:

1. Portal Name (visible to users)
2. Domain Name (access address from settings)
3. Partner count (clients and Resellers linked to the Contract Company).

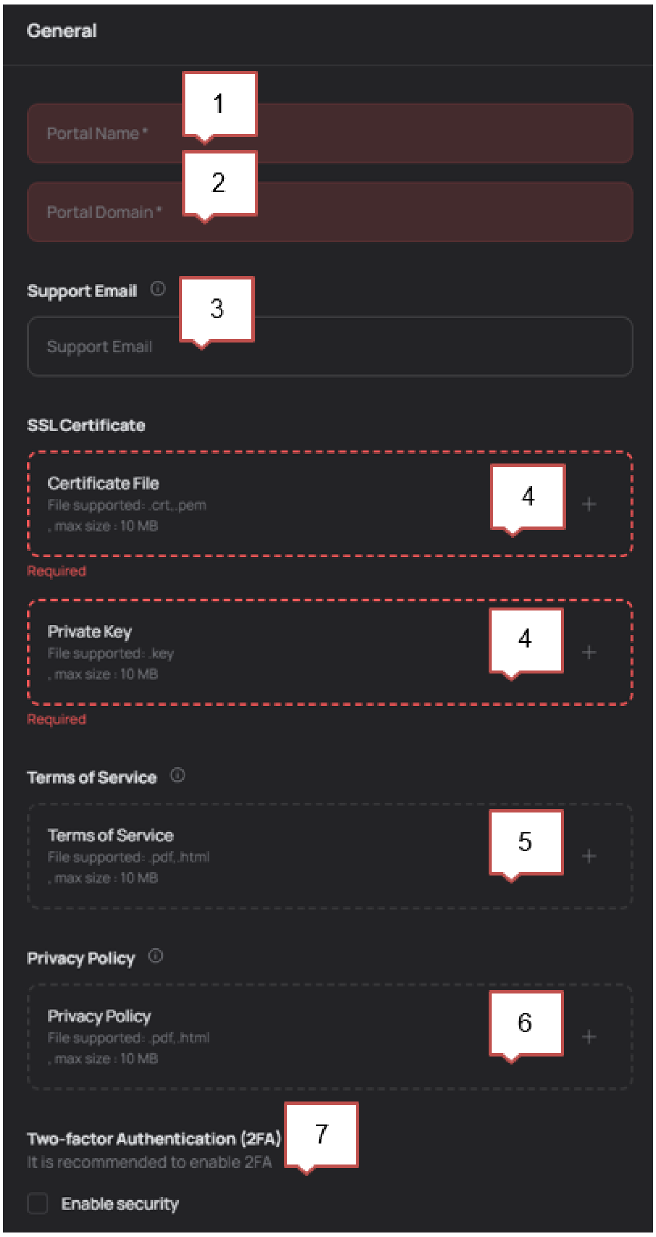
Click the button on an empty record to create and configure a new Admin Panel or Campaign Portal.

Create Campaign Portal

The configuration process includes three steps:

- General Settings
- Customization Settings
- Default Subscriber Settings

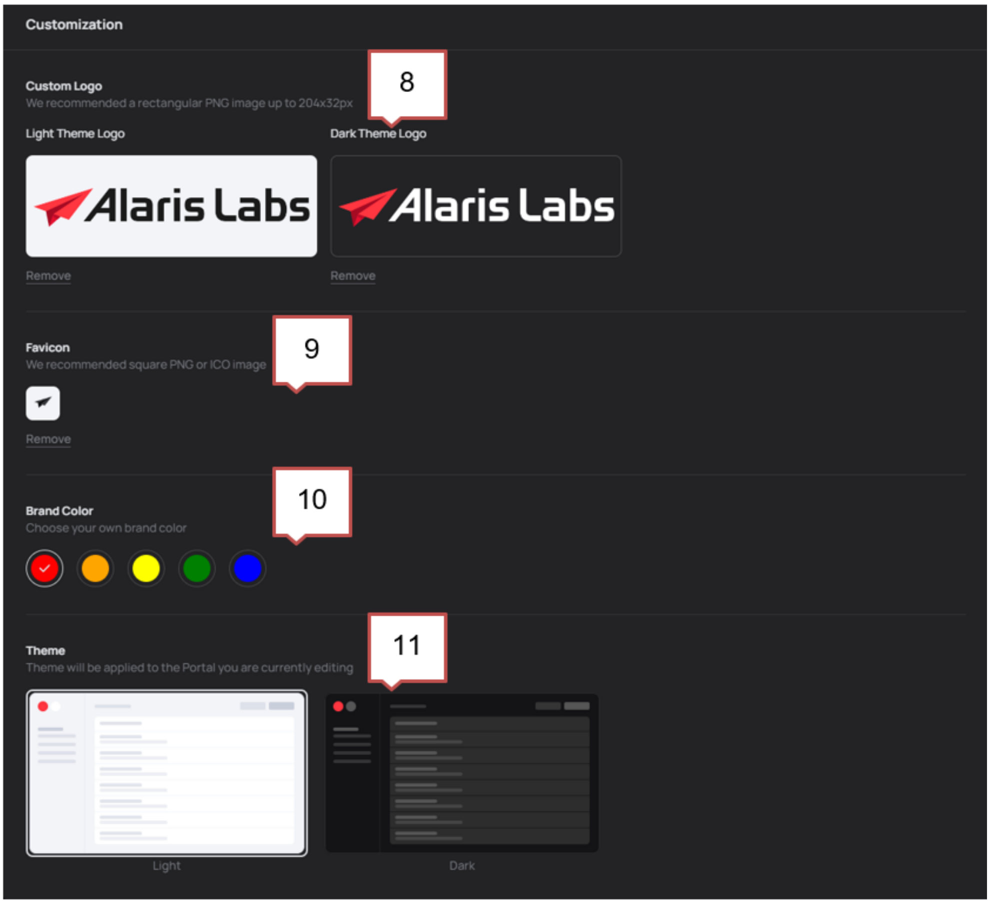
To create a portal, configure the following fields (required fields are marked with an asterisk *):



Create Campaign Portal (General)

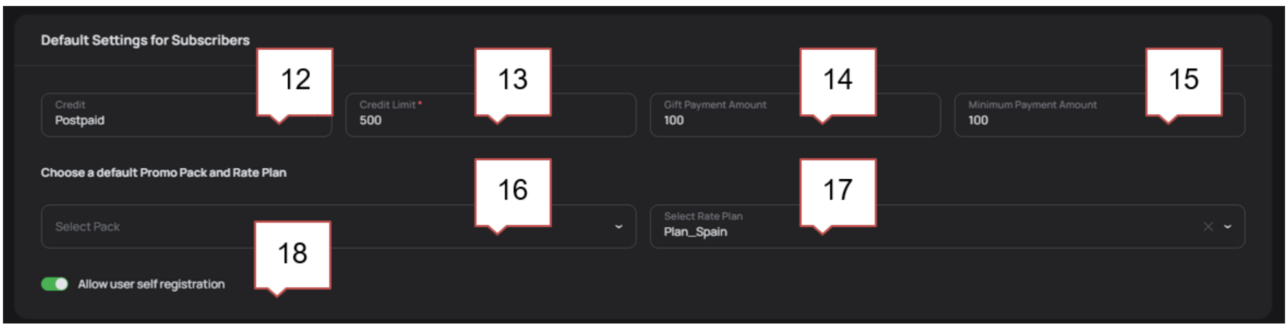
1. *Portal Name**: name that will be displayed at the portal.
2. *Portal Domain**: domain name (address) for access to the portal.
3. *Support Email*: contact email address that will be displayed on the registration and authorization pages, as well as in the user profile.
4. *SSL Certificate**: upload an SSL certificate (.crt/.pem) and private key (.key) for encrypted connections. Obtain these from your domain registrar.
5. *Terms of Service*: click the button to upload the *Terms and Conditions* that will be displayed at the portal registration page (PDF or HTML format).
6. *Privacy Policy*: click the button to upload the *Privacy Policy* that will be displayed at the portal registration page (PDF or HTML format).

7. *Enable Security*: activate two-factor authentication (2FA). Portal users will receive the alphanumeric code and setup instructions by email.



Create Campaign Portal (Customization)

8. *Custom Logo*: upload light/dark theme logos that will be displayed in the main page and inside the portal (PNG format, recommended size: 204x32px).
9. *Favicon*: upload a square PNG/ICO image for browser tab display.Click the *Remove* button, then *Upload* and select the required file in PNG or ICO format. If not selected, no favicon will be displayed.
10. *Brand Color*: select a color for interactive controls (buttons and switches). The text color is predefined.
11. *Theme*: choose the *Light* or *Dark* mode.



Create Campaign Portal (Default Setting for Subscribers)

12. *Credit*: select payment type (*Prepaid* or *Postpaid*).
13. *Credit Limit*: define credit limit for *Postpaid* users.
14. *Gift Payment Amount*: set a welcome balance for new users.
15. *Minimum Payment Amount*: specify the smallest allowed payment through a payment system.
16. *Select Pack*: assign a promotional message pack which will be available to self-registered users at the first login to the portal.
17. *Select Rate Plan*: assign a rate plan which will be available to self-registered users at the first login to the portal.
18. *Allow User Self-Registration*: enable/disable self-registration.

Click *Create* to apply the settings and create the portal. Use the ← button to return to the *Portals* interface.

Create Admin Panel

The configuration process includes two steps:

1. *General Settings*.
2. *Customization Settings*.

Admin Panel fields mirror those of the *Campaign Portal* interface.

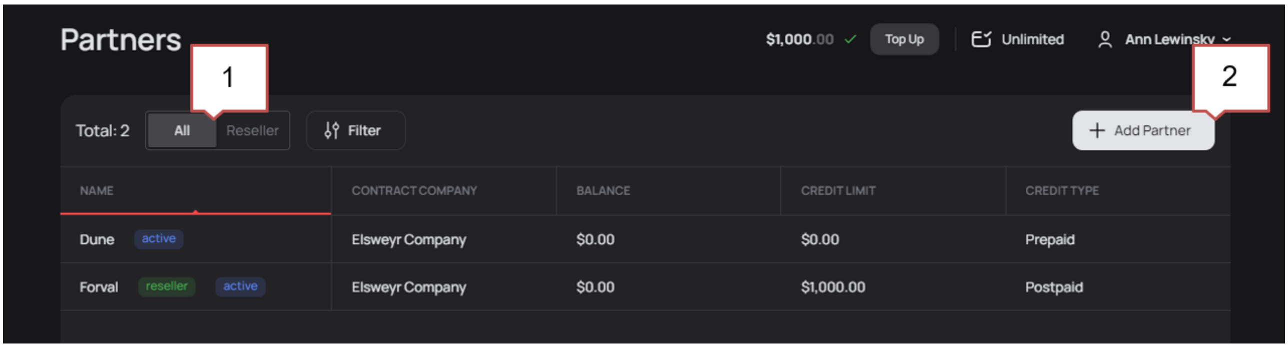
6 Partners

The *Partners* interface serves to control organizations acting on behalf of the System owner or Resellers.

The following partner types exist in the System:

- *System owner*: client holding a license for *Alaris Campaign Portal 2.0*, responsible for creating partners and users.
- *Reseller*: entity reselling traffic delivery services to other companies. It has access only to *Admin Panel* and cannot send campaigns through *Campaign Portal* (for sending campaigns it is required to log in to *AP* and create its own partners and *CP* users). A Reseller can also create its own Resellers.
- *End User*: *Campaign Portal* user executing campaigns.

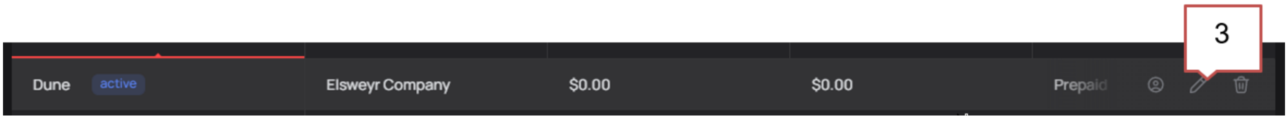
The interface displays a partner data table that provides key information about each partner.



Partners

The user can:

1. Use filters to display all partners or Resellers.
2. Click *Add Partner* (top right corner) to create a new entry.
3. Edit or delete records. Hover over a record to edit, view details, or delete it.

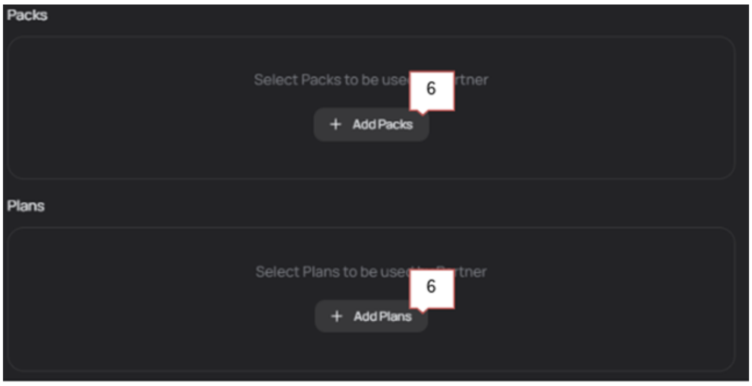


Add Partner

To add a Partner do the following:

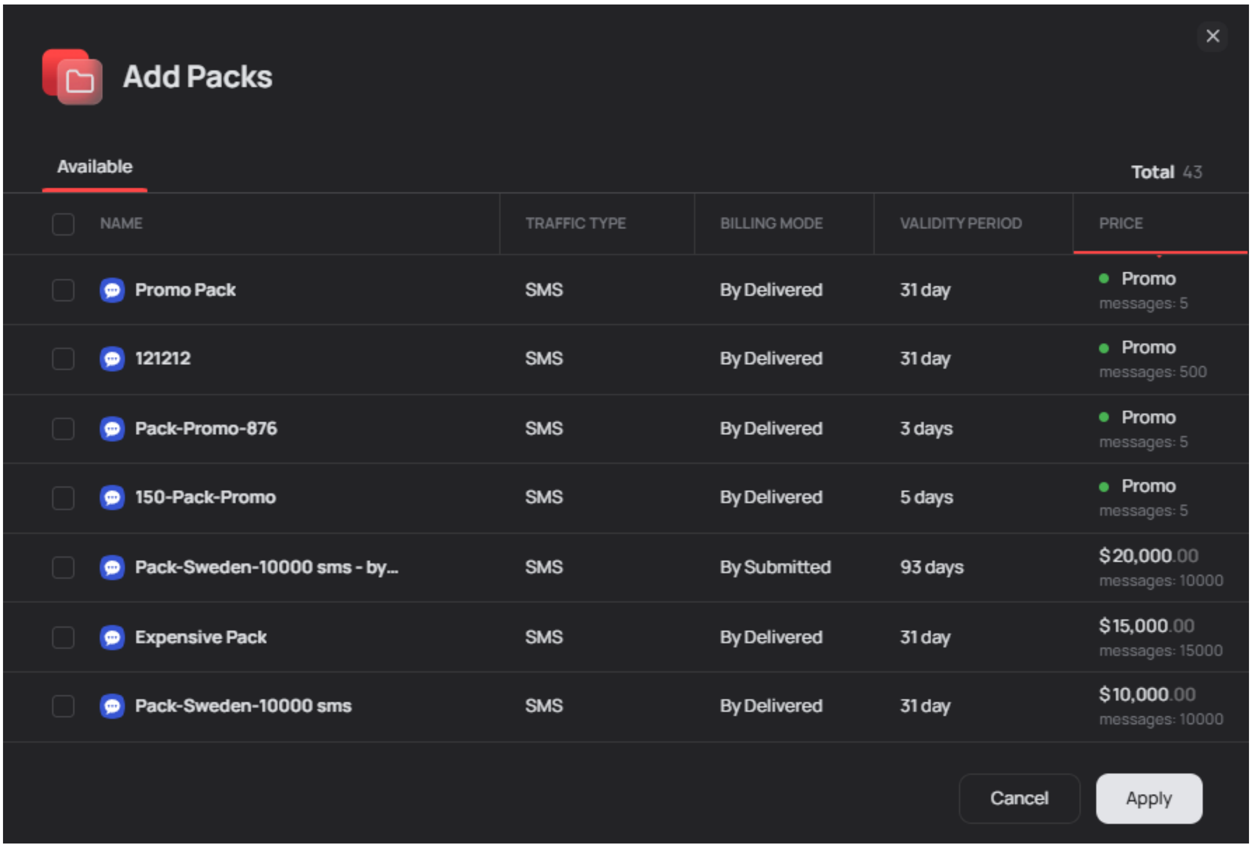
1. Enter the partner name.
2. Select a Contract Company.
3. Enable the *Reseller* checkbox if applicable.
4. Select the currency.
5. Select the payment type:
    - *Prepaid*
    - *Postpaid* (the credit limit must be specified)
    - *No Limit*

6. Add packs or rate plans by clicking the *Add Plans/Packs* in the *Add Partner* window.

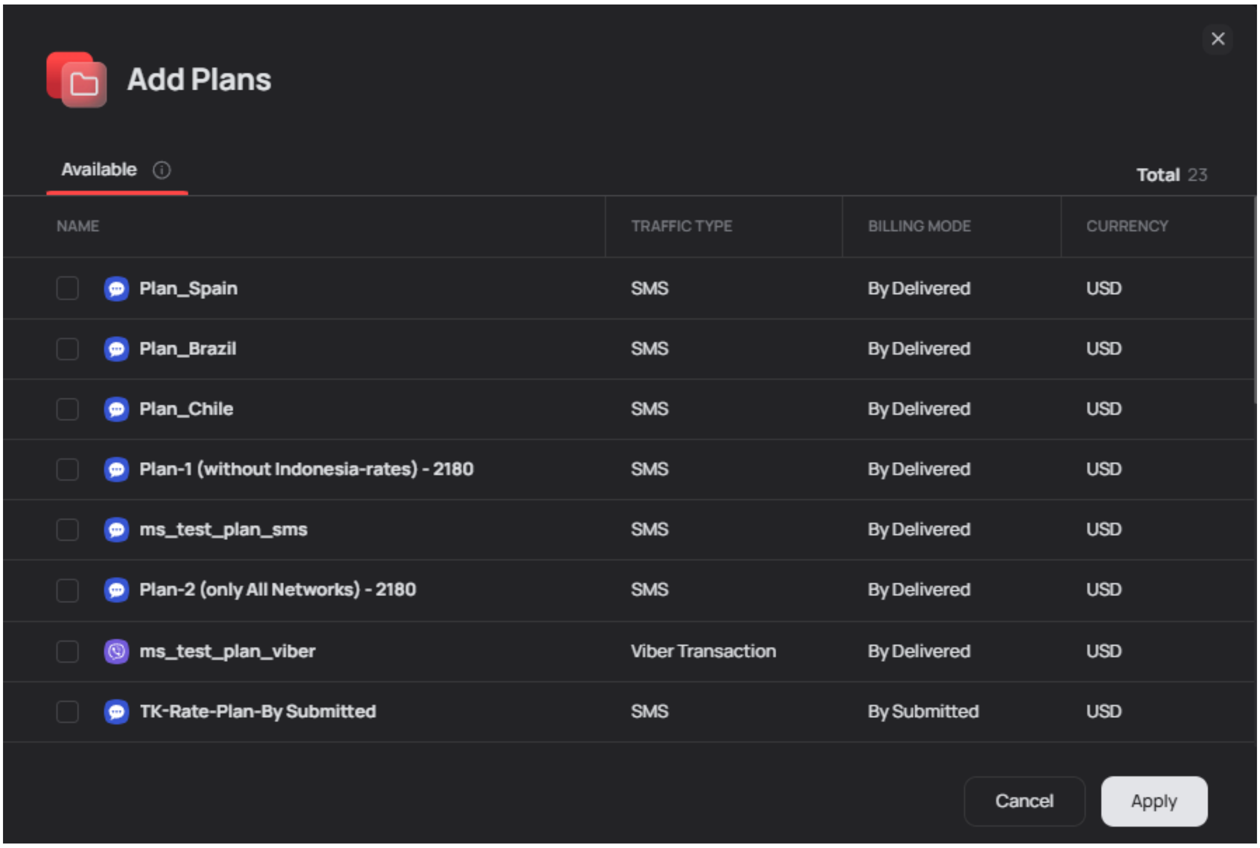


Add/Edit Partner

The subscription selection window opens, displaying entries created in the Subscriptions 26 interface.

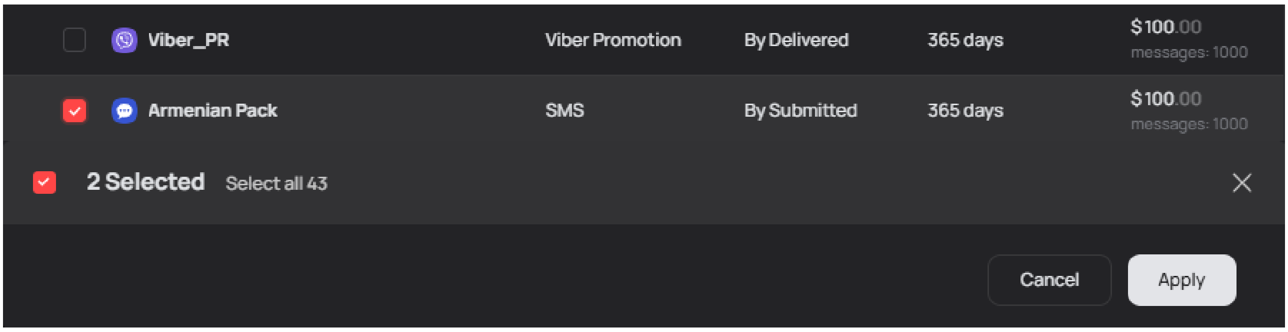


Add Packs

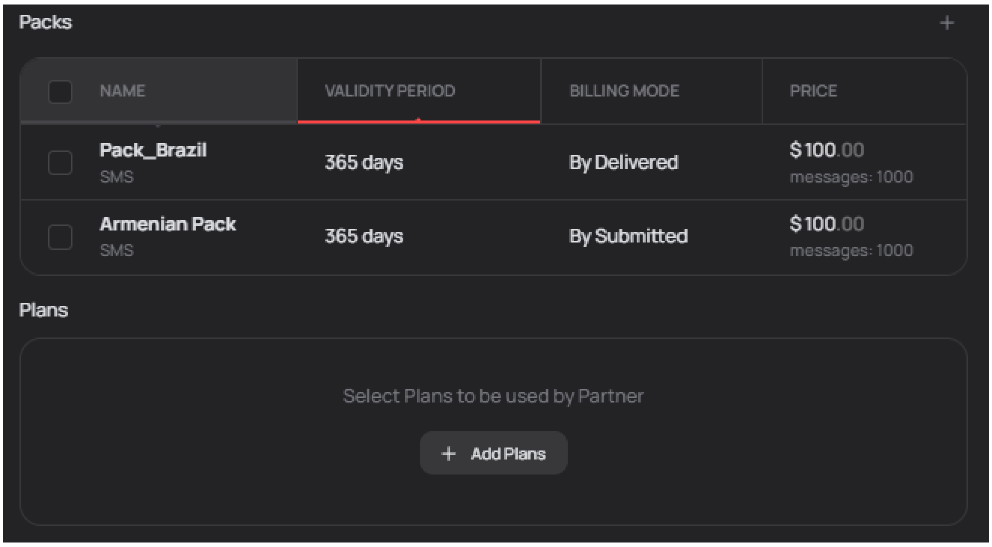


Add Plans

To add a pack or plan, select the respective records and click the *Apply* button. The subscription details will be added to the partner. Click *Cancel* to cancel the action.

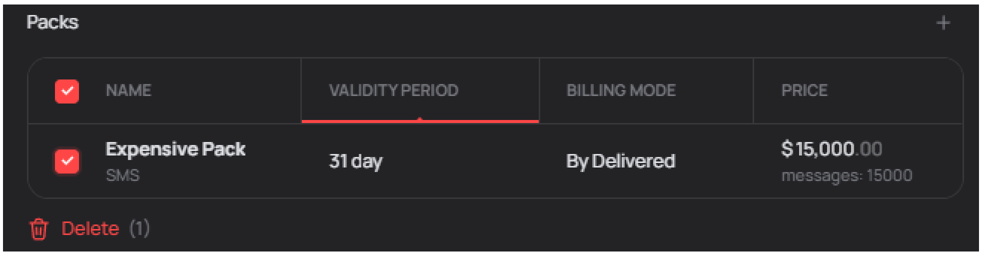


Selecting packs



Selecting plans

To delete a pack or plan, select the record and click *Delete*.



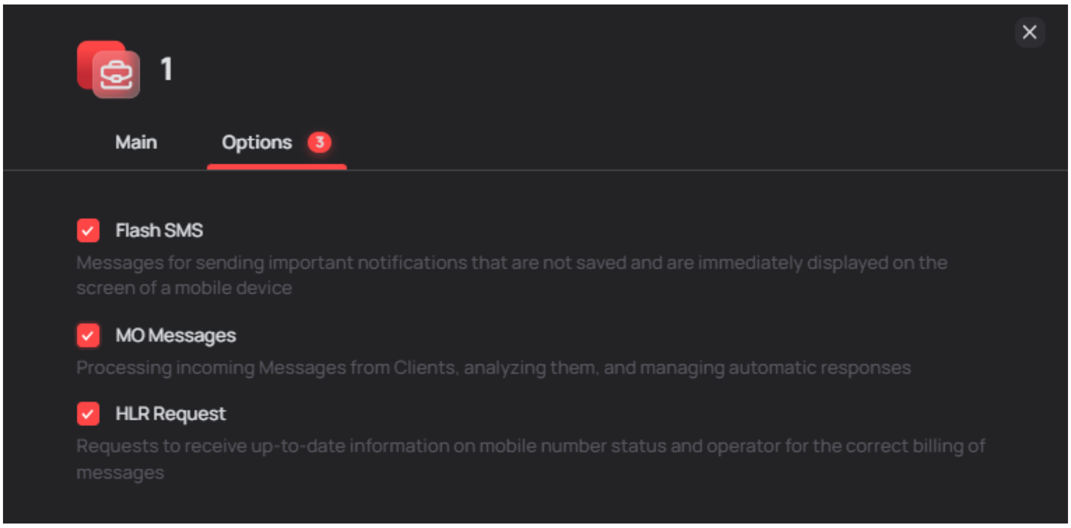
Deleting plans or packs

7. The user can enable additional options for the partner. Open the *Options* tab and select the features:

   - *Flash SMS*: enables sending flash messages in Campaign Portal. When enabled, Campaign Portal users have access to the *Flash messages* checkbox in the *Campaign Wizard* interface for sending flash messages.

   - *MO Messages*: enables the MO messages functionality. When enabled, Campaign Portal users can create templates for automatic responses to incoming messages from clients and enable them in the Campaign Wizard interface when sending campaigns.

   - *HLR Request*: enables HLR dipping. After it is enabled and the connection is set up in the HLR 86 interface, a request is sent to HLR Proxy after the campaign is launched to get up-to-date information about the clients' mobile numbers.



Options tab

Click *Create* to finalize. The System verifies partner name uniqueness (duplicate names are not allowed). Click *Cancel* to discard the changes.

7 Subscriptions

The *Subscriptions* tab serves to create, edit and remove subscriptions.

Three types of subscriptions are available in the System:

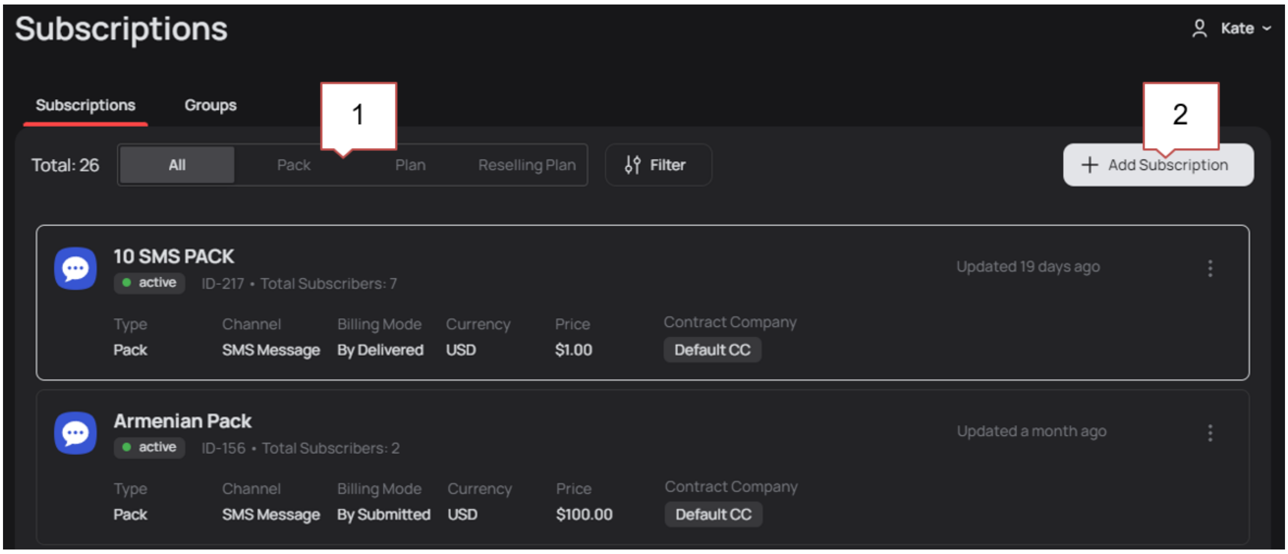
- *Rate plan*: a standard postpaid rate plan at a predefined rate, which is intended for sale to end clients.
- *Message pack*: a prepaid pack that has a fixed cost and contains a predetermined number of messages. It has no rates as such, just the countries and networks it covers.
    - *Promo pack*: a pack of free messages. The following rules are applied to promo packs: when creating a Campaign Portal, the default pack selection is only available from the promo pack. Promo packs are not displayed in the Campaign Portal store.
- *Reseller plan*: a rate plan that is intended for resellers. Resellers will be able to generate new plans based on this plan to resell to their own resellers or customers.

The interface consists of two tabs:

- Subscriptions: serves to manage subscriptions.
- *Groups*: serves to manage groups of subscriptions.

7.1 Subscriptions tab

The *Subscriptions* tab is an alphabetized list of subscription cards that provides basic information about each subscription.

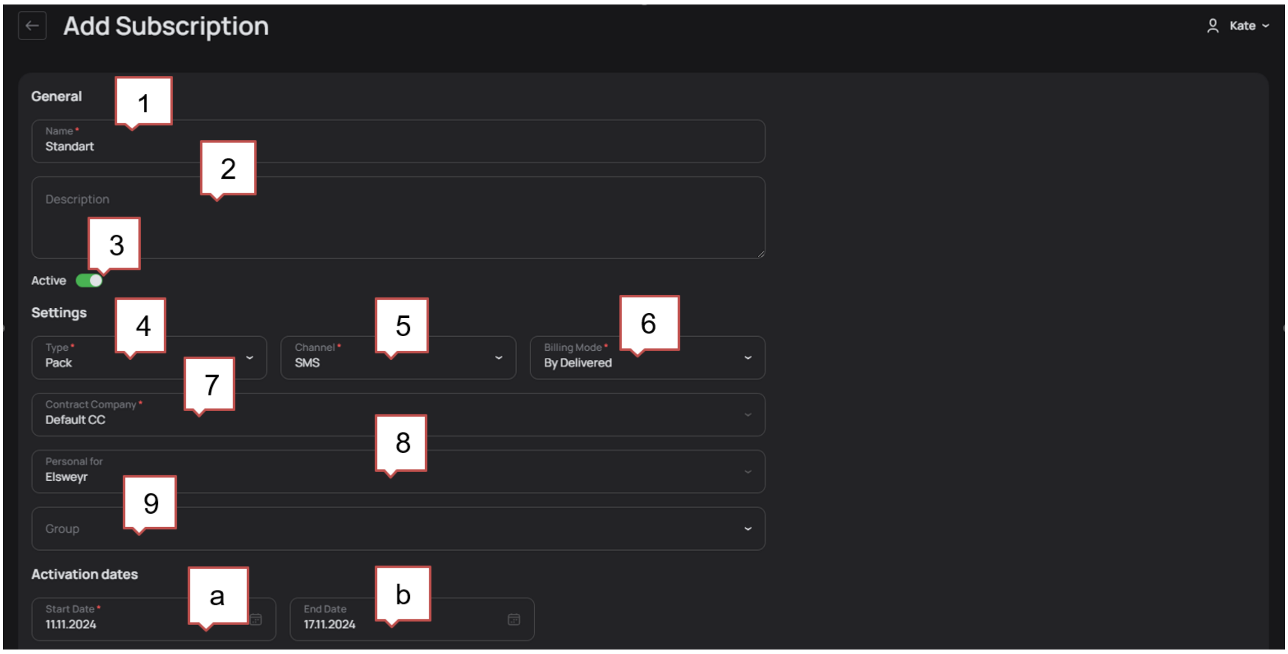


Subscriptions

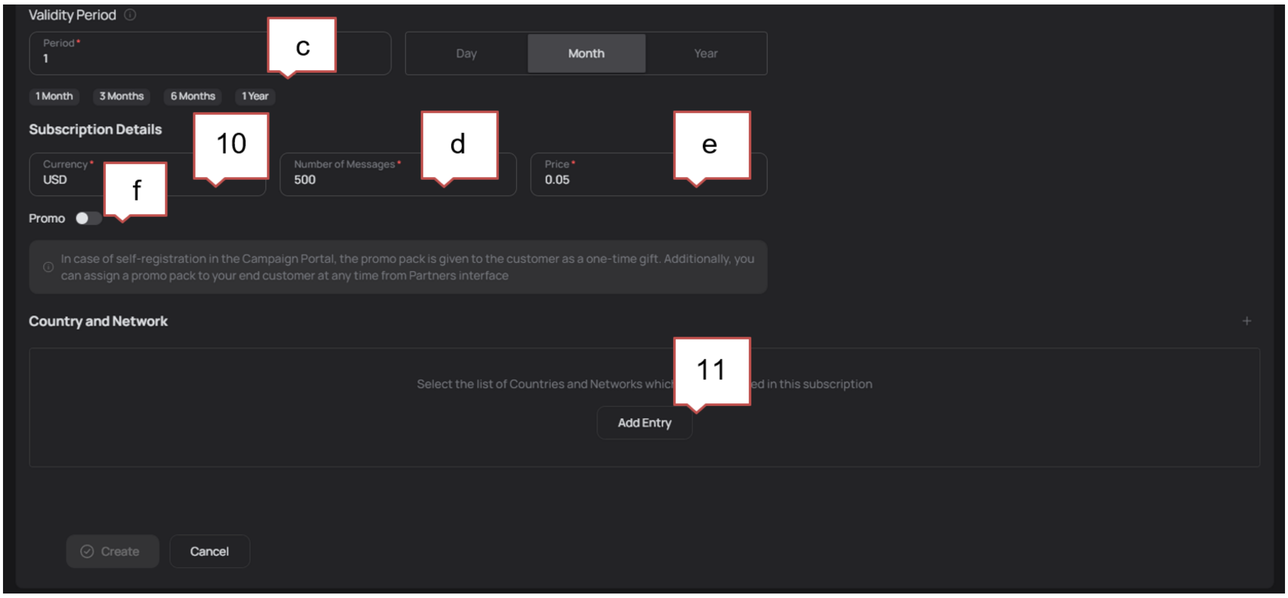
The following options are available:

1. Apply the filter to display all subscriptions or subscriptions of a specific type (All | Pack | Plans | Reselling Plan).
2. Click the *Add Subscriptions* button located in the top right corner to create a new subscription.
3. Edit, view, or delete subscriptions. Click the ⋮ button and choose the required action.

To add a new subscription, provide the following parameters:



Add Subscriptions (1)



Add Subscriptions (2)

1. *Name* (required): specify the subscription name.
2. *Description*: add a description.
3. *Active*: enable or disable the subscription.
4. *Type* (required): select the subscription type (*Plan, Pack, Reselling Plan*). Additional fields appear or hide based on the selected type.
5. *Channel* (required): select the delivery channel (*SMS/Viber*).
6. *Billing Mode* (required): choose the billing mode (*By Submitted*, *By Delivered*).

7. *Contract Company* (required): select one or more contract companies created in the Contract Companies 87 interface to grant access to the subscription.

8. *Personal for*: select partners that will have access to the subscription (multiple selections are allowed). This field becomes available only after selecting a *Contract Company* and displays partners linked to that company.

9. *Group*: choose a subscription group created in the *Groups* 31 tab (only one group can be selected).

10. *Currency* (required): select the currency (currently only USD is available).

Additional parameters for a Pack are as follows:

a. *Start Date* (required): define the pack start date (date from which it can be purchased).

b. *End Date*: define the end date for purchasing the pack (date till which it can be purchased).

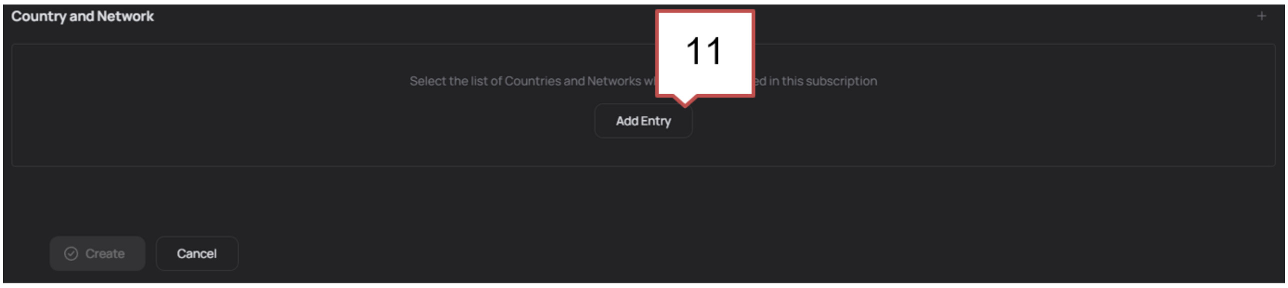
c. *Validity Period* (required): set the pack validity period after purchase, irrespective of the Start/End dates configured above (1, 3, 6 months, 1 year, or custom value).

d. *Number of Messages* (required): specify the pack volume (total messages included).

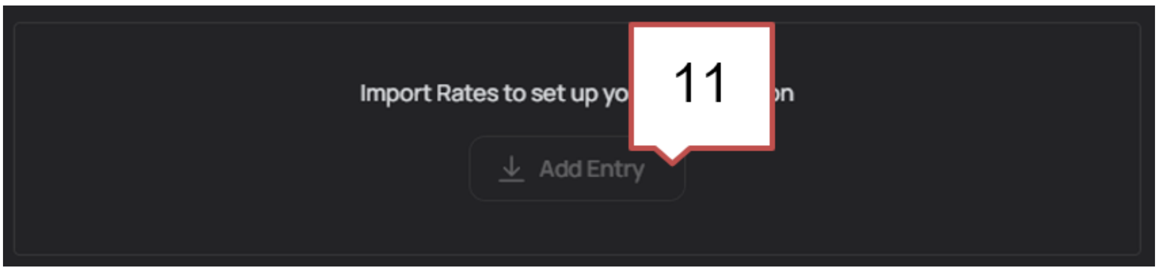
e. *Price* (required): enter the pack price in the selected currency.

f. *Promo*: activate the checkbox to make it a promo pack. It sets *Price* to 0 and disables editing.

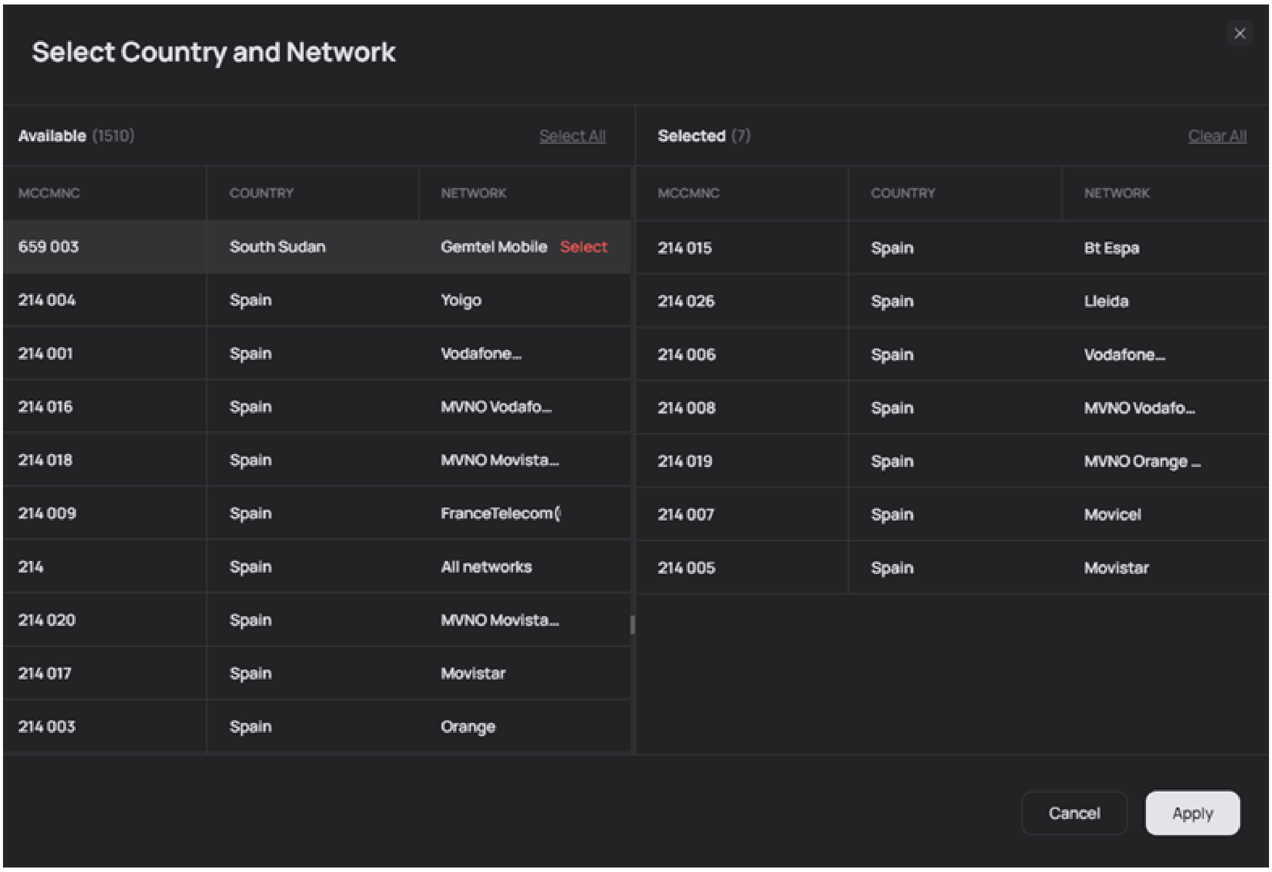
11. *Country and Network*: add a list of countries and networks included in the subscription. Click the *Add Entry* button to include entries.



For subscriptions of the *Plan* type, rates can be imported in the Import Rates 33 interface by selecting the *Add Entry* button.

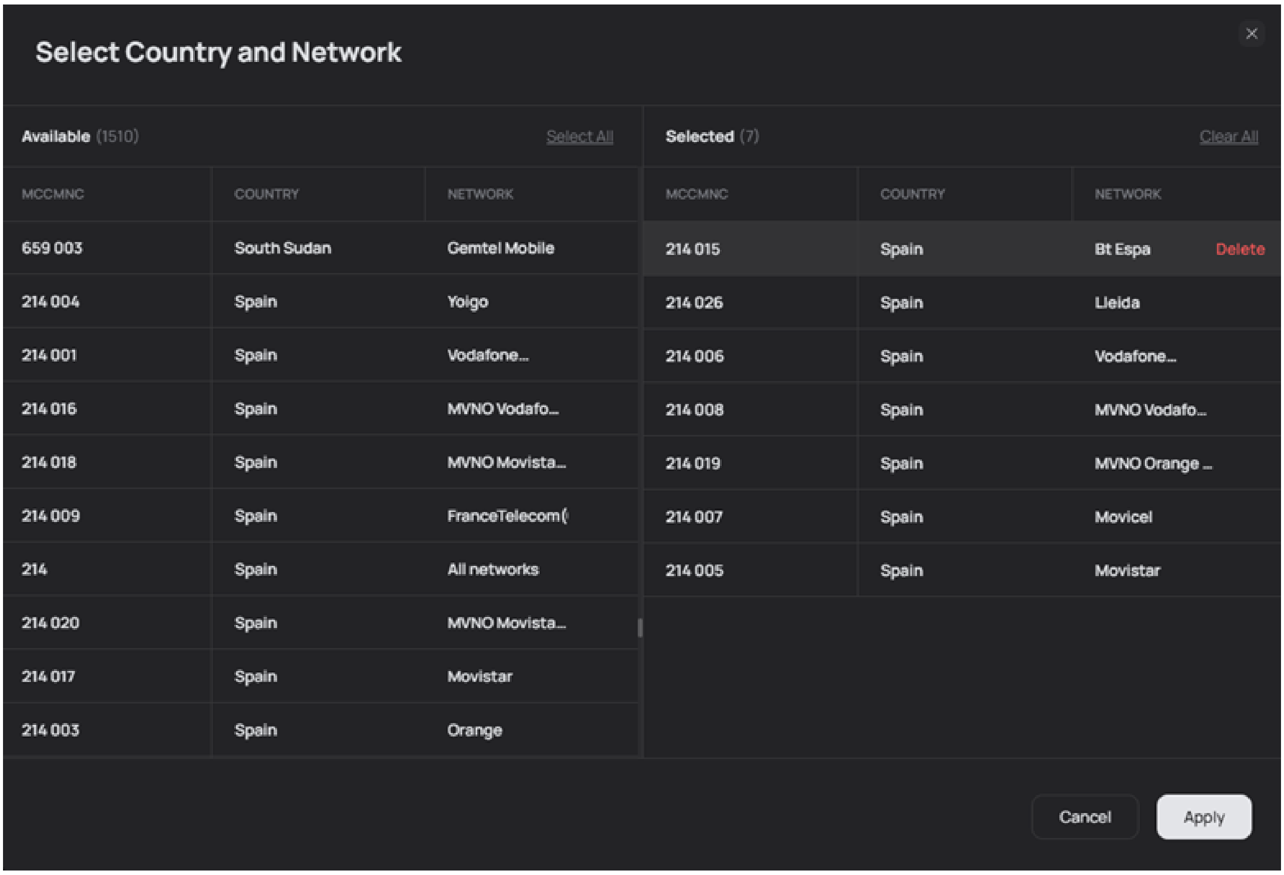


For subscriptions of the *Pack* type, click the *Select* button to choose countries and networks.



Select Country and Network (Select)

To remove an entry, click the *Delete* button.



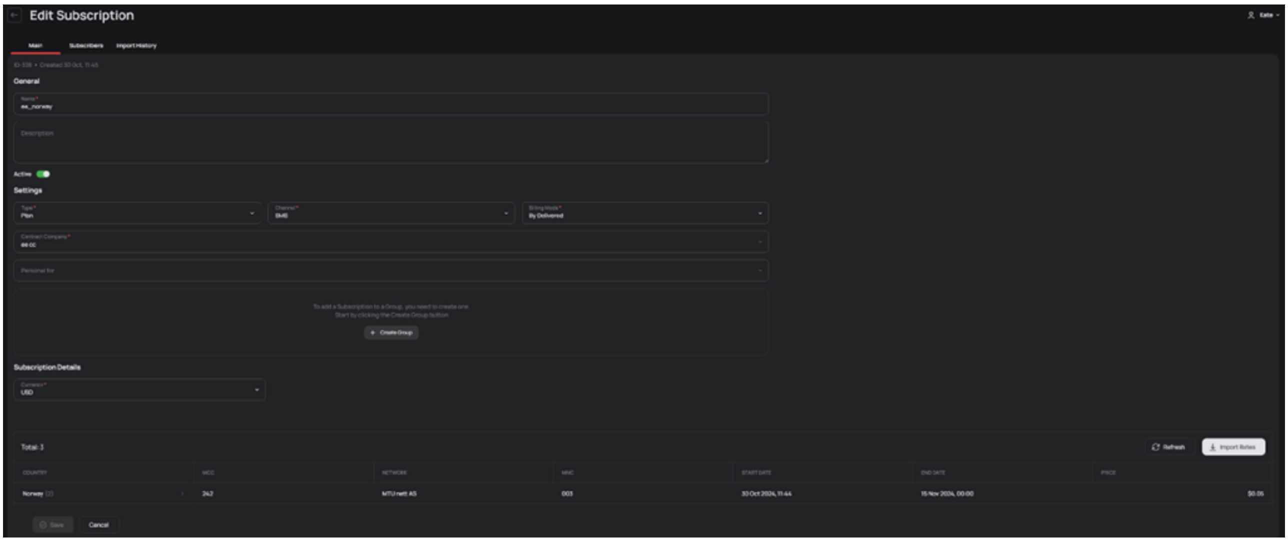
Select Country and Network (Delete)

After adding countries and networks, select *Apply* to confirm. The *Cancel* button discards changes.

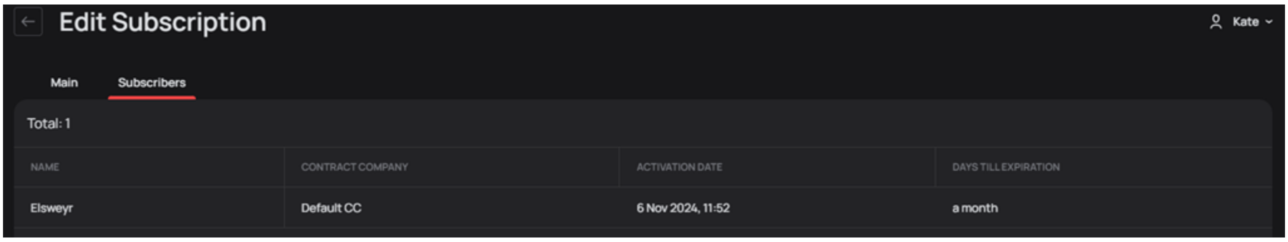
Once all parameters are configured, select *Create* to finalize the subscription. The System checks for uniqueness: duplicate subscription names are not permitted. The *Cancel* button discards all inputs.

The Edit subscription window includes three tabs:

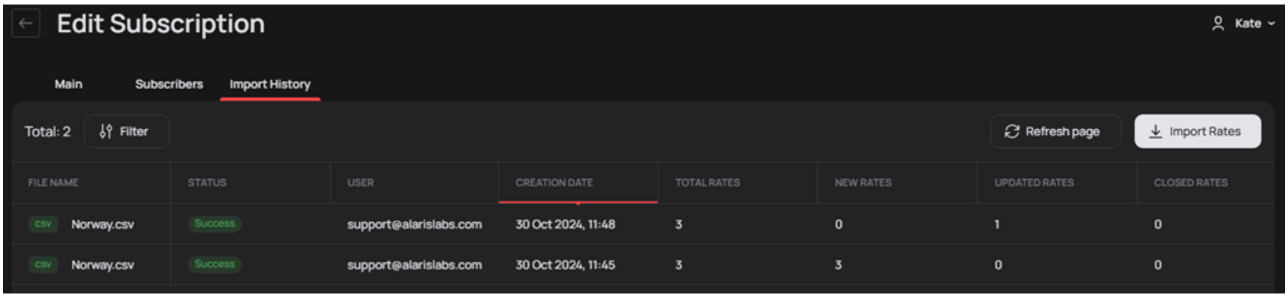
1. *Main*: Core subscription parameters.
    - All fields are editable if no partners are subscribed.
    - If partners are subscribed, only *Contract Company* and *Personal for* can be modified.
    - For *Plan* and *Reselling Plan* types, rates for the subscription appear at the bottom.
2. *Subscribers*: Partners with access to the subscription. Partners may be unsubscribed here.
3. *Import History*: Rate import history (available only for *Plan* and *Reselling Plan*).



Edit Subscription > Main



Edit Subscription> Subscribers



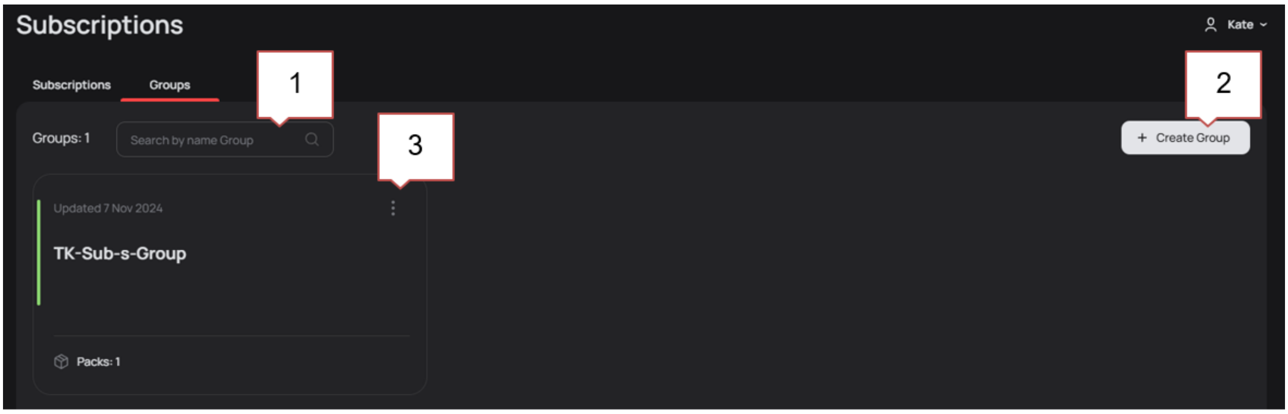
Edit Subscription > Import History (for Plan only)

7.2 Groups tab

Subscription Groups enable the creation and configuration of rate plans and packs directly linked to specific vendors or vendor groups. It helps differentiate vendors in terms of quality of service.

Groups consolidate subscriptions: a group is created, assigned subscriptions, and later specified in the Endpoints 39 interface.

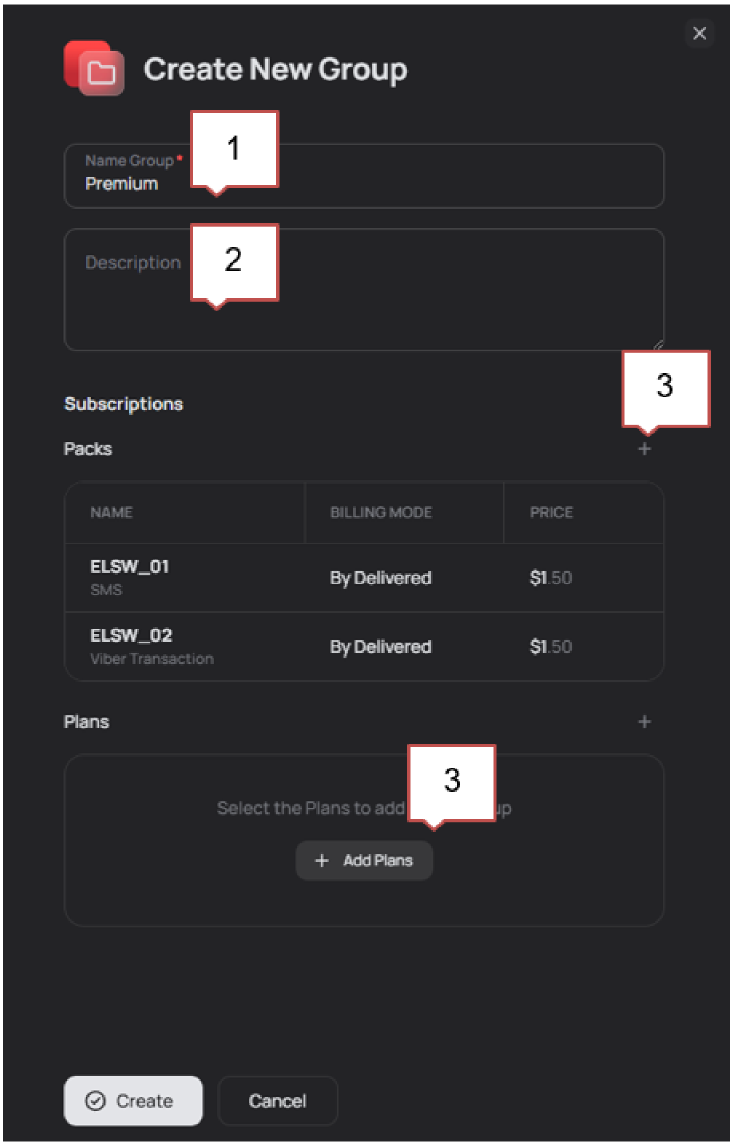
The *Groups* tab displays a list of groups as cards containing subscription group details.



Groups

The following options are available:

1. Use the search function to locate relevant groups.
2. Click the *Create Group* button located in the top right corner to add a new group.
3. Edit or delete subscription groups. Click the context menu  and choose the required action.



Create New Group

To add a new group, complete the following parameters:

1. Enter the group name.
2. Optionally add the group description.
3. Select required subscriptions by clicking the *Add Packs* or *Add Plans* button.

After configuring parameters, click *Create* to save the changes. The System verifies uniqueness: duplicate group names are not permitted. The *Cancel* button discards changes.

All parameters can be modified when editing groups.

7.3 Import Rates

The interface is designed for importing client rates. The import consists of the following steps:

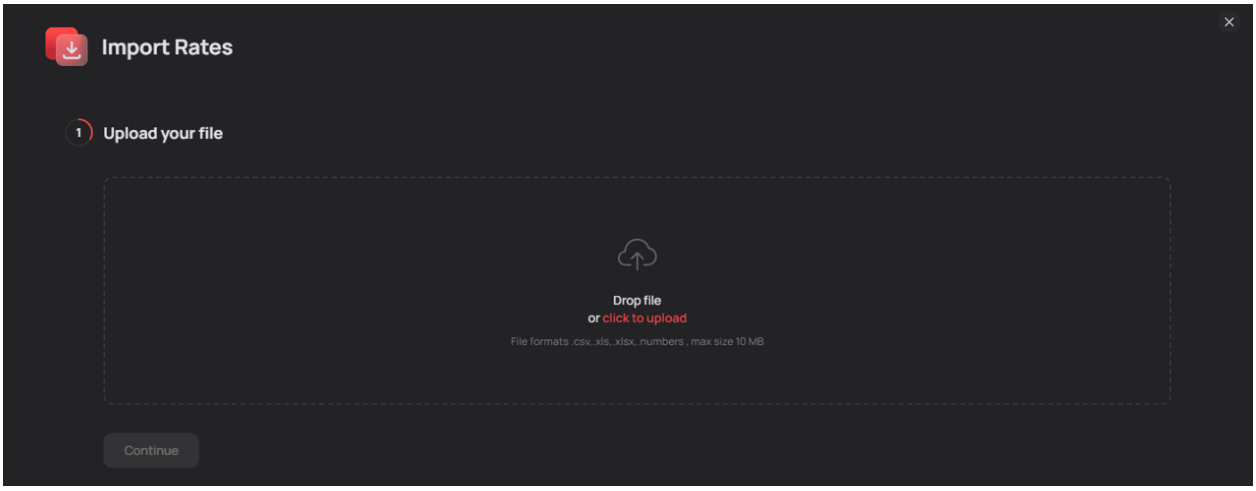
1. *Upload Your File*: upload a rate file.
2. *Mapping Data*: map file columns to System fields and configure rate validity periods.

3. *Rates Analysis*: review planned import results.

Each stage is clickable. The user can return to any stage if necessary.

Step 1: *Upload Your File*

Upload rate files in CSV, XLS, or XLSX format (maximum size: 10 MB). Click the *Drop File* button or drag&drop the file into the window.

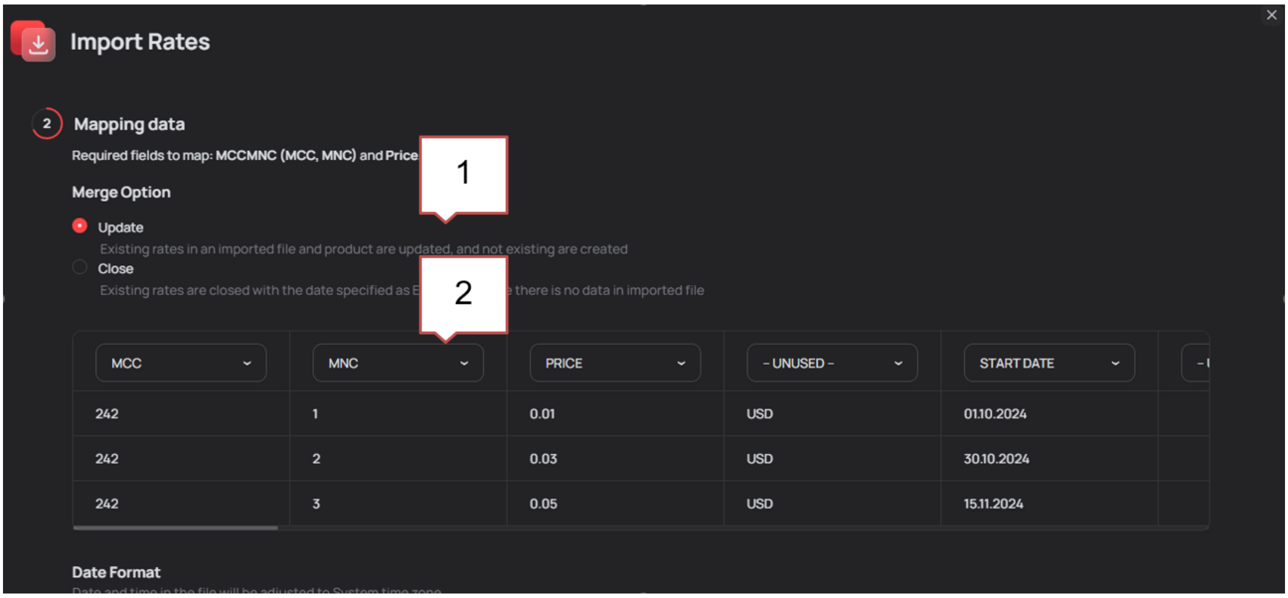


Import Rates> Step 1 Upload your file

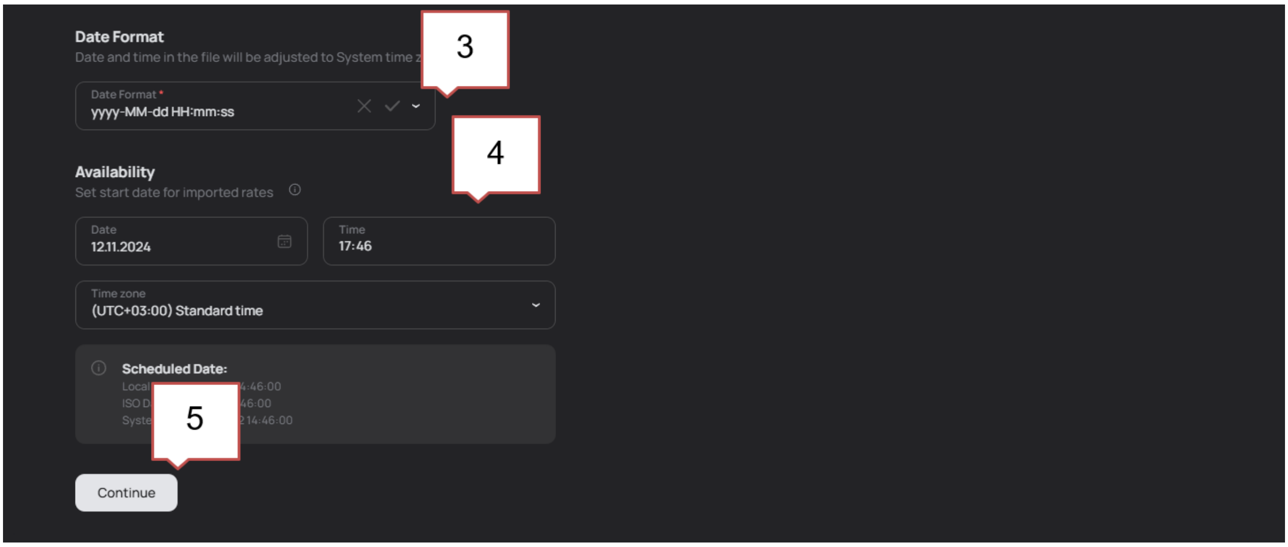
Uploaded files can be deleted and replaced.

Step 2: *Mapping Data*

1. *Merge Options* (if existing rates are available):
   - *Update*: updates existing rates from the file and creates new ones if they do not exist in the System. It is the default option. Normally it is used to modify the *Start & End Date* or Price (any combination).
   - Close: closes existing rates by assigning an end date (if not provided in the file). Rates matching selected dates are closed. If no end date is specified, the rate remains active indefinitely.
2. *Column Mapping*:
   - Required columns: *MCCMNC* and Price.
   - Optional columns: *Country, Network, Start Date, End Date, MCC, MNC*.
3. When mapping the *Start* & *End Date* columns, the date format must be selected to align file date/time formats with the System's time zone.
4. *Start Date/Time/Time zone*: define the effective start date for imported rates.



Import Rates> Step 2



Import Rates> Step 2 (Continued)

5. Click the *Continue* button to proceed to rate analysis.

Step 3: *Rates Analysis*

Before confirming rate import at the Rate Analysis stage, the System will display the import preview (the number of rates found, updated, new and closed). Correlation with network countries is performed according to the internal e.212/e.164 Reference Book84.

When importing a rate with a period overlapping with the existing one, the rate is divided into two rates with the statuses *increase/decrease/same* and *new.*

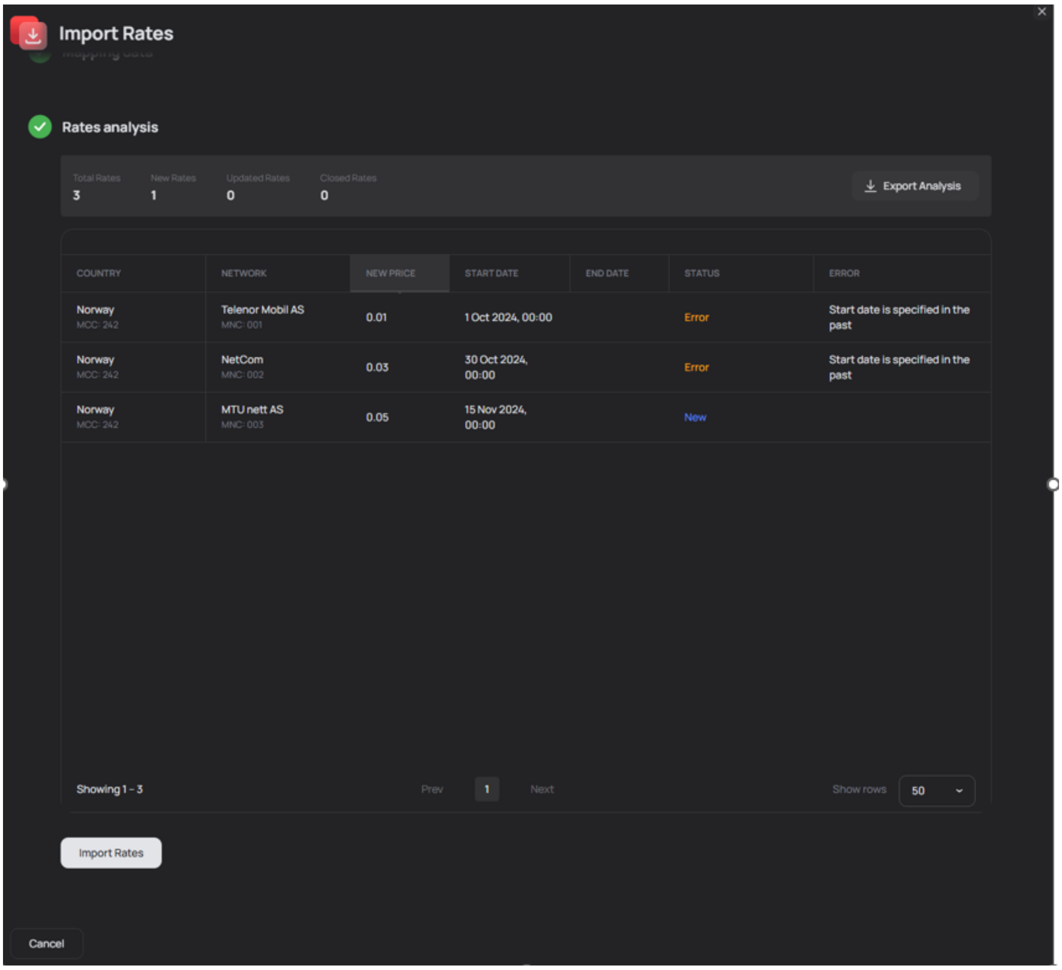
The import summary contains the following values:

- *Total rates*: the total number of imported rates.
- *New Rates*: the number of rates with the *New* status.
- *Updated Rates*: the number of rates with the status *Increase*, *Decrease*, *Same.*

- *Closed Rates*: the number of rates with the status *Closed*.
- *Import Analysis*: a button that serves to download a file with the analysis results.

The following statuses are available:

- ***New***: a rate that did not exist before and was added to the System as a result of import. It is displayed in blue.
- ***Same***: a rate that already existed in the System and was not changed during import (the period itself may have been reduced/expanded). This rate is updated during import, but remains unchanged. It is displayed in white.
- ***Increase***: a rate the price of which has increased compared to the previous value. It is displayed in red.
- ***Decrease***: a rate the price of which has decreased compared to the previous value. It is displayed in green.
- ***Closed***: a rate that was closed as a result of importing new data, that is, all periods that were available for this direction after *activeTill* are deleted. It is displayed if the *Close* option is selected, when the old rate is closed on the specified date and is replaced by a new rate. It is displayed in white.
- ***Error***: a rate that cannot be imported. It is displayed in yellow. The table will contain a description of the error. (For example, "Start Date is before now", "End Date is before Start Date").



Import Rates> Step 3

Click the *Import Rates* button to complete the process. The *Cancel* button discards all actions.

8 Vendors

The *Vendors* interface is intended for configuring vendor products. Vendors are carriers to which the System owner supplies traffic.

The interface consists of four tabs:

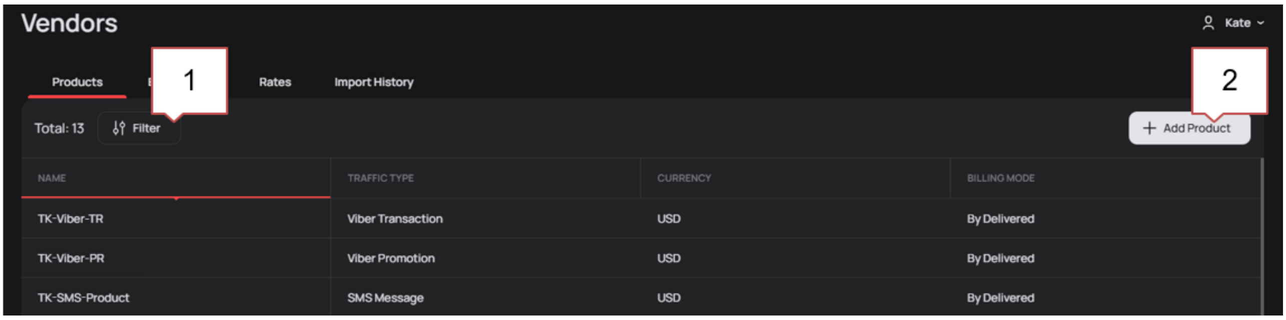
- Products 38: a product is a set of rates grouped by channel. Each rates is associated with a certain product, and the product has a name, currency and traffic type.
- Endpoints 39: connection endpoints (channels to which traffic is sent).
- Rates 46: the *Rates* tab that contains a directory of products and the rate prices.
- Import History 47: history of imported rates with the ability to upload previously imported files. It allows viewing the user that performed the import, as well as brief results of the import, that is, what changes were made and their number.

The Reseller has only one tool - Rates. Rates appear in the Reseller's interface only after a higher-level partner assigns a subscription to the Reseller. No import or endpoints are available. The rate parameters (currency, traffic type, name, validity dates, country, network) are determined by the corresponding parameters of the respective reselling plan.

To configure a vendor:

1. Create a product in the Products 38 tab.
2. Create an endpoint in the Endpoints 39 tab to which the product will be routed.
3. Create rates and associate them with the vendor product in the Rates 46 tab.

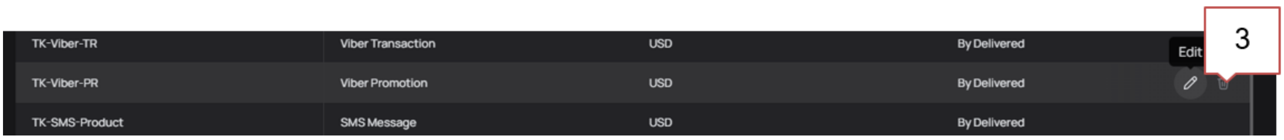
8.1 Products

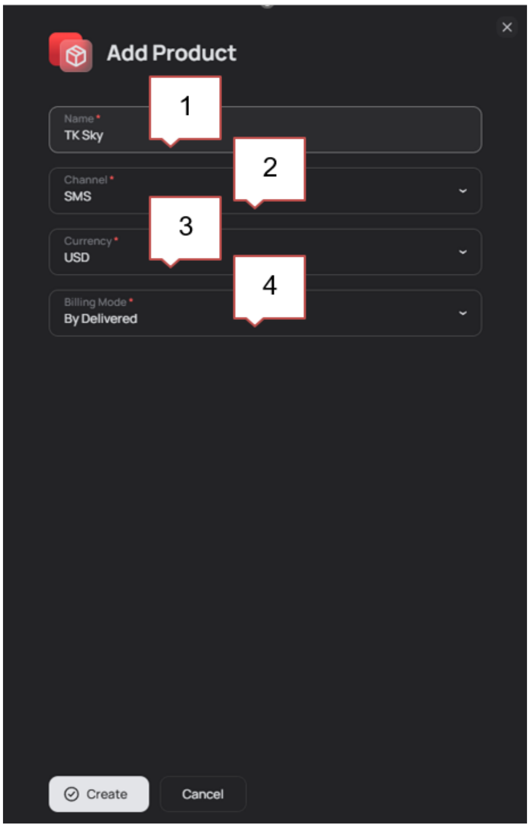


Vendors > Products

The user can:

1. Use the filter to display relevant entries.
2. Click the *Add Product* button located in the top right corner and add a new product.
3. Edit or delete products. To do this, hover the mouse over the entry and select the required action:





Add Product

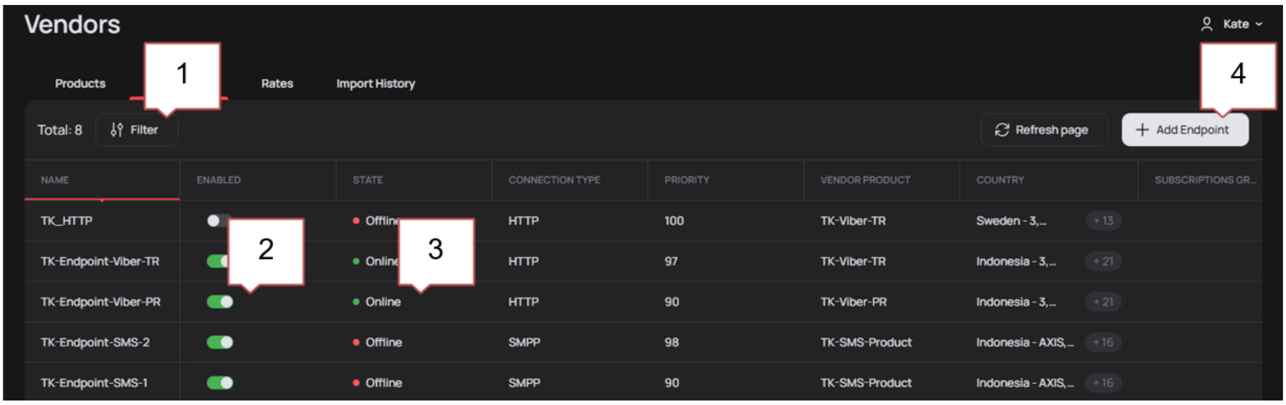
To add a new product, fill in the following parameters:

1. Specify the name of the product.
2. Choose delivery channel (*SMS* or *Viber*).
3. Select the currency.
4. Choose the billing type (*By Delivered* or *By Submitted*).

After filling in the parameters click the *Create* button. When creating new products, uniqueness is verified. The System does not allow products with the same names. The *Cancel* button is intended for canceling the action.

When editing a product, the user can change only its name.

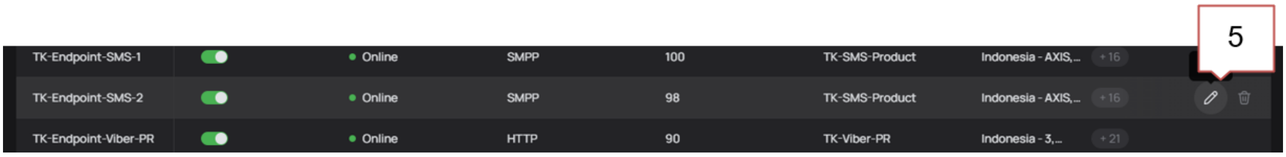
8.2 Endpoints



Vendor > Endpoints

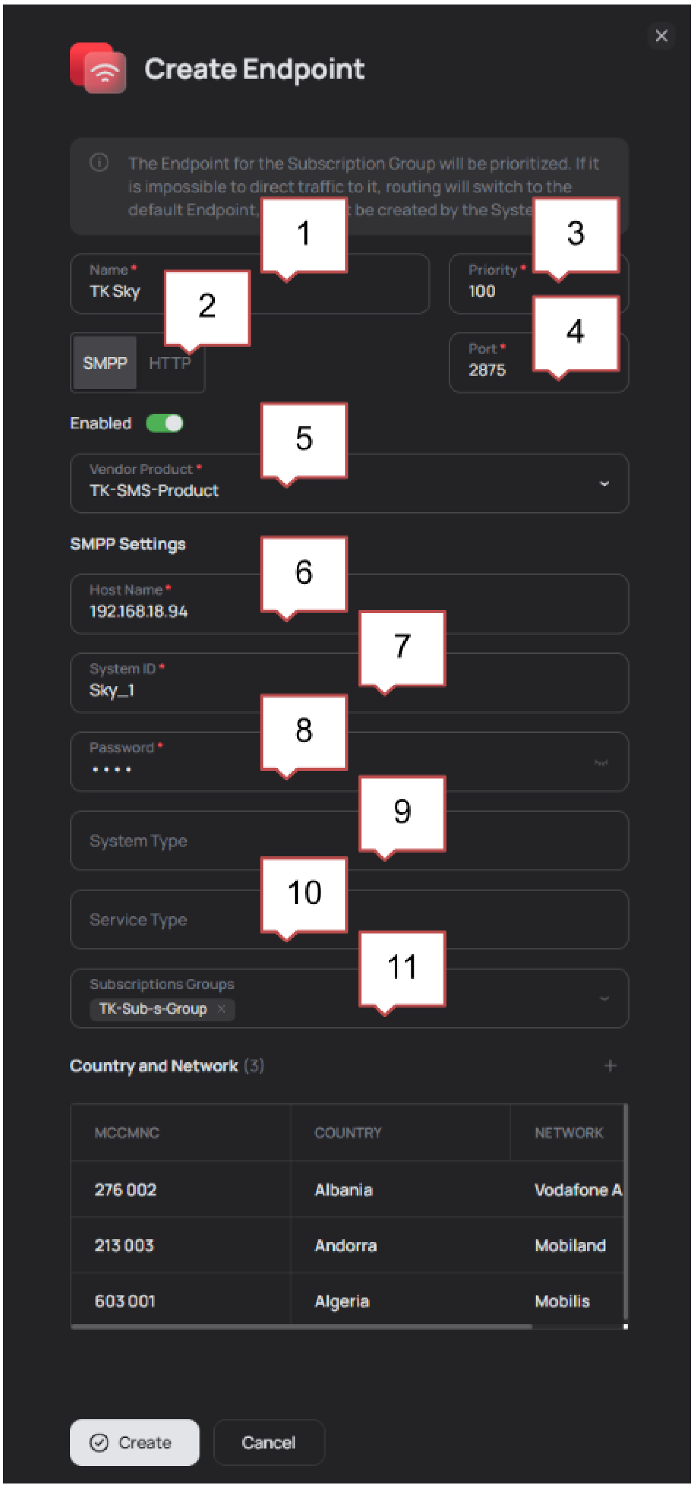
The user can:

1. Use the filter to display relevant entries.
2. View whether the endpoint is enabled or disabled.
3. See if the endpoint is online or offline.
4. Click the *Add Endpoint* button located in the top right corner and add a new endpoint.
5. Edit or delete endpoints. To do this, hover the mouse over the entry and select the required action:



Endpoints come in two connection types, SMPP and HTTP, each having its own specific parameters.

8.2.1 SMPP

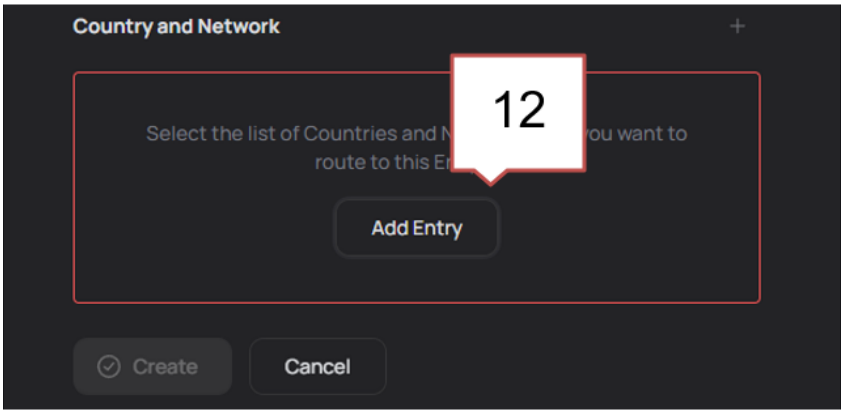


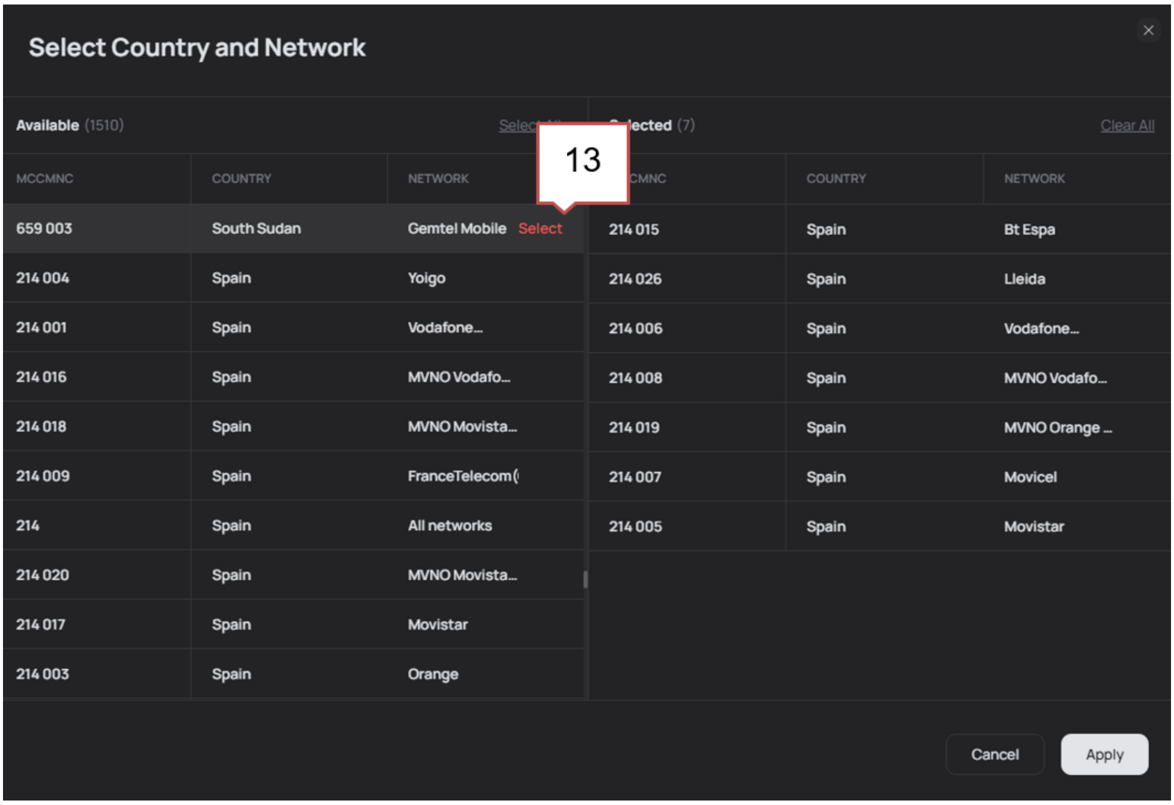
Create Endpoint (SMPP)

To add a new SMPP endpoint, complete the following parameters:

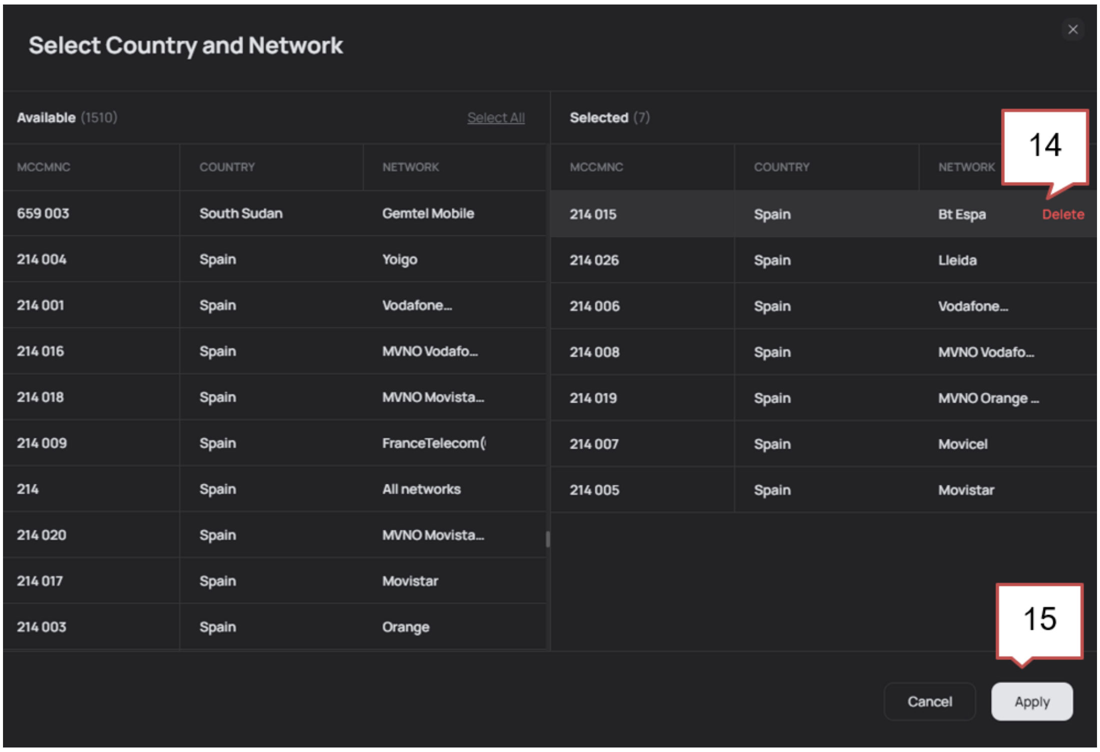
1. Specify the name of the endpoint.
2. Specify the type of SMPP connection.
3. Specify the priority (from 1 to 100).

4. Specify the port numbers used to connect to the SMPP server (up to 5 digits).
5. Select the vendor product.
6. Specify the IP or domain name of the SMPP server
7. Specify the channel login used for authentication when connecting to the SMPP server.
8. Specify the password used for authentication when connecting to the SMPP server.
9. If necessary, specify the authorization parameter.
10. If necessary, specify the quality of service level (up to 6 alphanumeric characters).
11. If necessary, specify a group of client subscriptions to be routed to this endpoint.
12. Add a list of countries and networks to be routed to this Endpoint by clicking the Add Entry button.





Select Country and Network (Select)



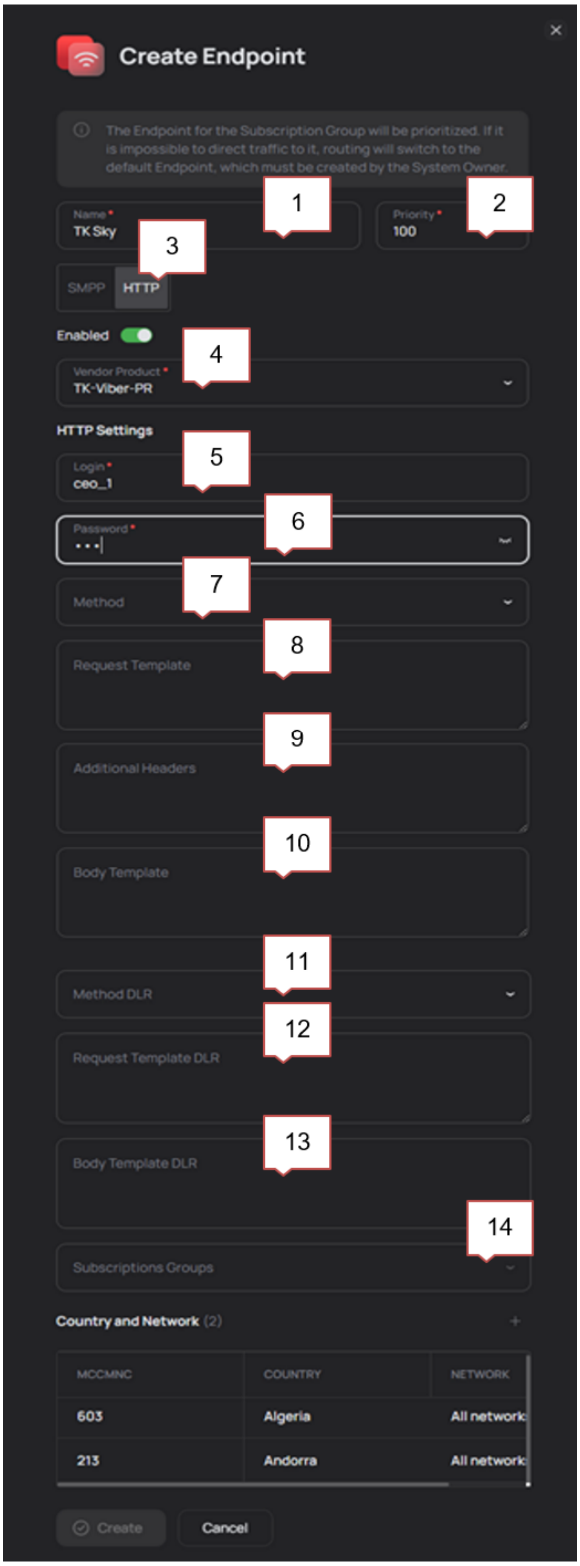
Select Country and Network (Delete)

13. Click the *Select* button to select countries and networks.
14. To remove an entry, click the *Delete* button.
15. After adding countries and networks, click the *Apply* button. The *Cancel* button is used to cancel the action.

After filling in the parameters, click the *Create* button. When creating new endpoints, uniqueness is verified. The System does not allow endpoints with the same names. The *Cancel* button is intended for canceling the action.

8.2.2 HTTP

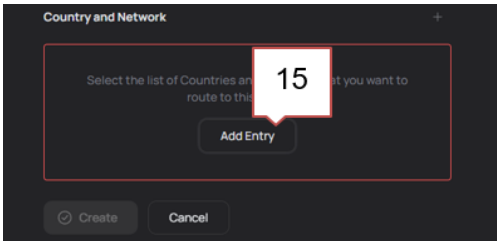
To add a new HTTP endpoint, fill in the following parameters:



Create Endpoint (HTTP)

1. Specify the name of the endpoint.
2. Specify the priority (from 1 to 100).

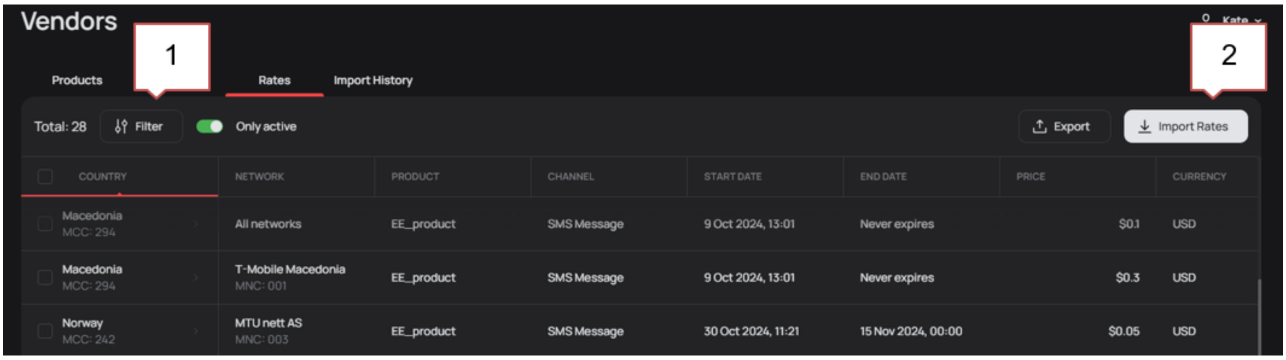
3. Specify the *HTTP* connection type.
4. Select the vendor product.
5. Specify the login used to send HTTP requests as Basic authorization.
6. Specify the password used to authenticate the user or client when sending HTTP requests to the secure endpoint.
7. If necessary, specify a template for the server response that defines the format and content of the response. This response will be returned if the request is successful.
8. If necessary, specify the type of the HTTP method used to send the request (GET or POST), where GET is used to retrieve data from the server and POST is used to send data to the server.
9. If necessary, specify a template to generate the request URL that defines the structure and format of the request sent to the server. The template must include markers that will be replaced with real values. The host+port combination is not required for an HTTP URL template; it is specified simply in as a URL.
10. If necessary, specify a template to generate the request body in JSON format, which is used in POST requests. The template must include markers that will be replaced with real values.
11. If necessary, specify additional HTTP headers to be added to the request. They can include headers for authentication, content type, and other required parameters.
12. If necessary, specify the type of HTTP request method used to request the delivery status (Delivery Report). It specifies the method (GET or POST) that will be used to retrieve delivery reports. Usually it is the same as the method for a normal request, but may be different.
13. If necessary, specify a template to generate the URL of the message delivery status request. It specifies the format and structure of the request to retrieve message delivery status information. The template must include markers that will be replaced with real values. The host+port combination is not required for an HTTP URL template; it is specified simply in as a URL.
14. If necessary, specify a template to form the body of the message delivery status request in JSON format. It is used in POST requests to send data related to delivery reports. The template must include markers that will be replaced with real values.
15. If necessary, specify a group of client subscriptions to be routed to this endpoint.
16. Add a list of countries and networks to be routed to this endpoint by clicking the *Add Entry* button. The window for adding countries and networks is similar to SMPP endpoints.



After filling in the parameters, click the *Create* button. When creating new endpoints, uniqueness is verified. The System does not allow endpoints with the same names. The *Cancel* button is intended for canceling the action.

8.3 Rates

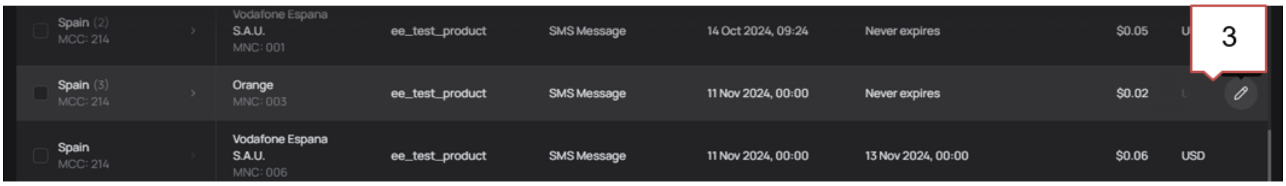
The tab contains a table that shows products and associated rates.

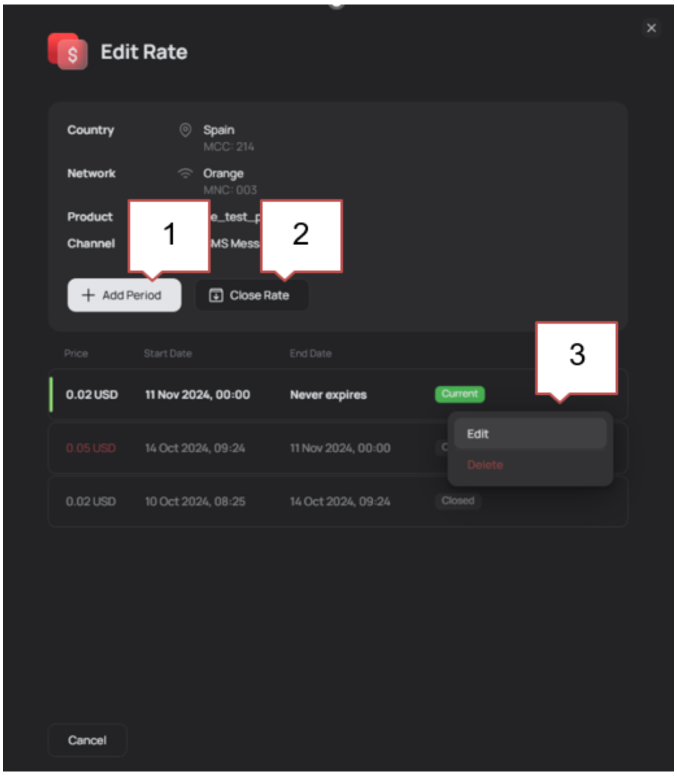


Vendor > Rates

The user can:

1. Use the filter to display relevant records.
2. Click the *Import Rates* button located in the top right corner and upload the new rates. The rates are loaded in the Import Vendor Rates [48] interface.
3. Edit Rates. To do this, hover the mouse over the record and select the required action:

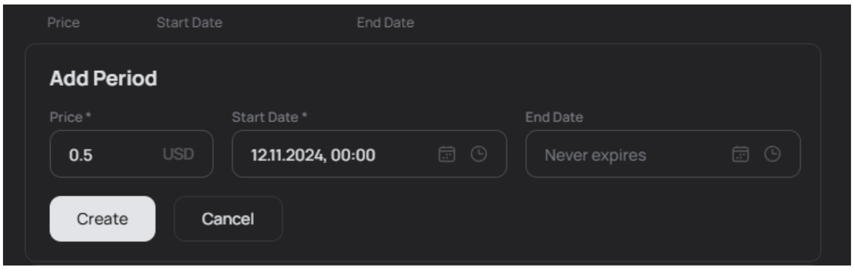




Edit Rate

The user can:

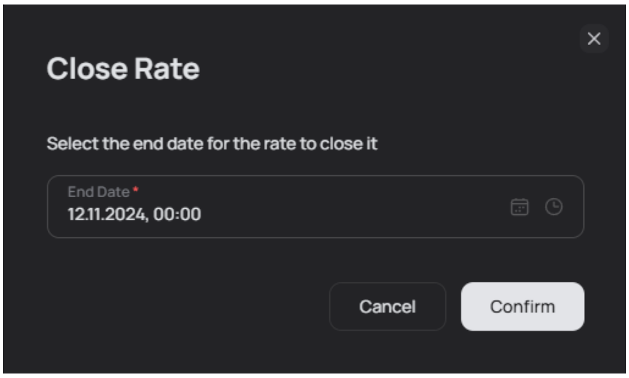
1. Add a new period:



Edit Rate > Add Period

To add a new period specify the cost and the start and end date (if necessary). After filling in the parameters click the *Create* button. The new period will be added to the rate. The *Cancel* button is used to cancel the action.

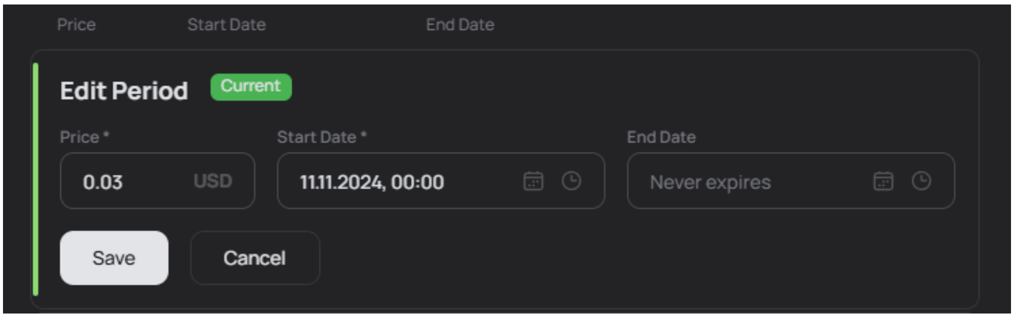
2. Close the rate:



Edit Rate > Close Rate

To close the rate, confirm the action with the *Confirm* button. The *Cancel* button is used to cancel the action. The default closing date is the current day.

3. Modify or delete the rate:

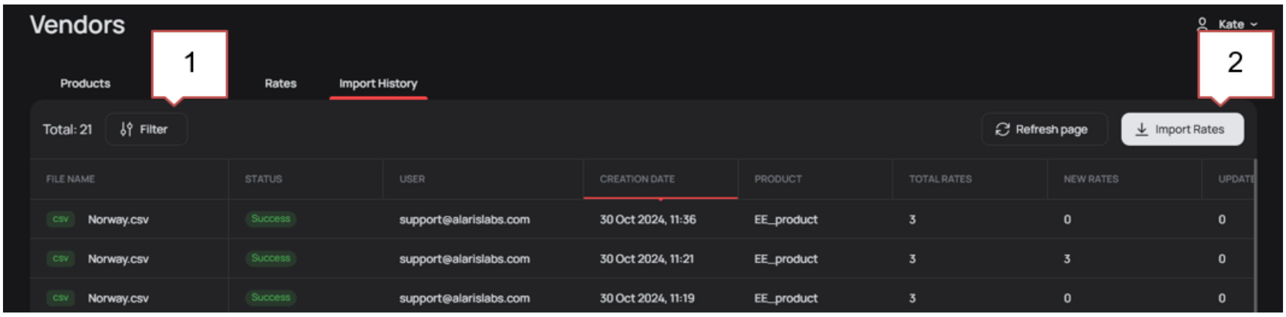


Edit Rate > Edit Period

You can change the cost and validity period of the rate. After changing the parameters, click the *Save* button. The *Cancel* button serves to cancel the action.

8.4 Import History

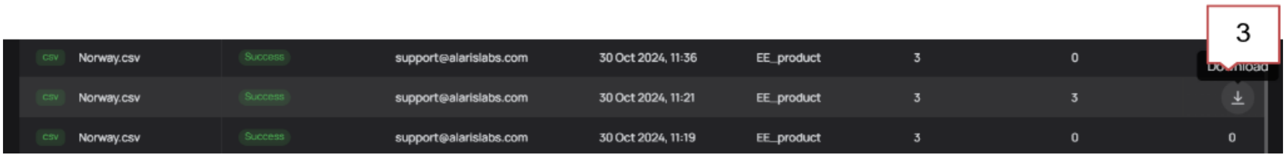
Each rate stores history with the ability to upload previously imported files, view the user that performed the import, and a summary of import results - how many and what changes were made.



Vendor > Import History

The user can:

1. Use the filter to display relevant records.
2. Click the *Import Rates* button located in the top right corner and upload the new rates. The rates are loaded in the [Import Vendor Rates] 48 interface.
3. Download the rates. To do this, click 2 times on the required line or hover the mouse over the required record and select the required action :



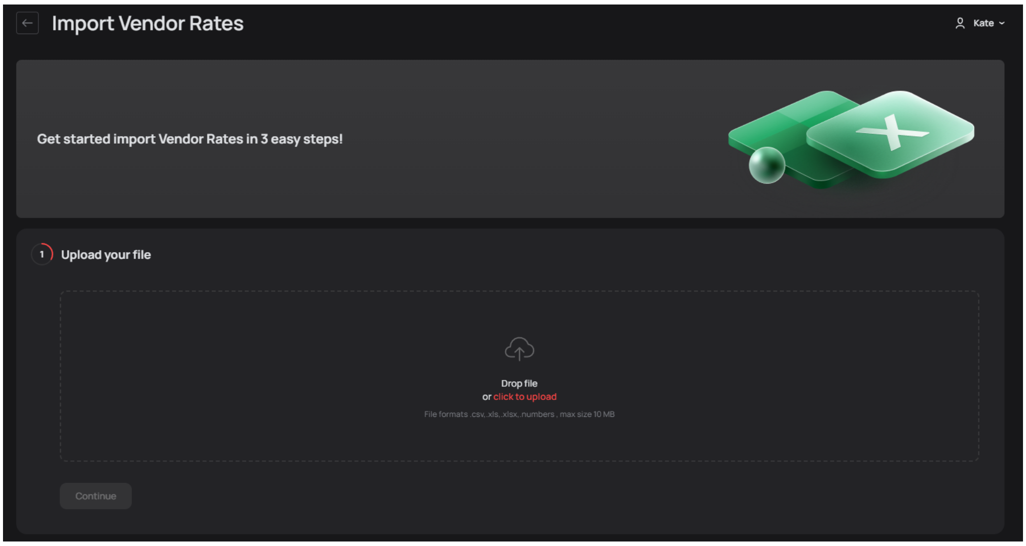
8.5 Import Vendor Rates

The interface is designed for importing vendor rates. Import consists of several steps:

- *Upload your file* designed to upload a rate file.
- *Mapping Data* designed to select a vendor product, map the columns from the file to the System columns and customize the rate validity periods.
- *Rates analysis* designed to view the results of the planned import.

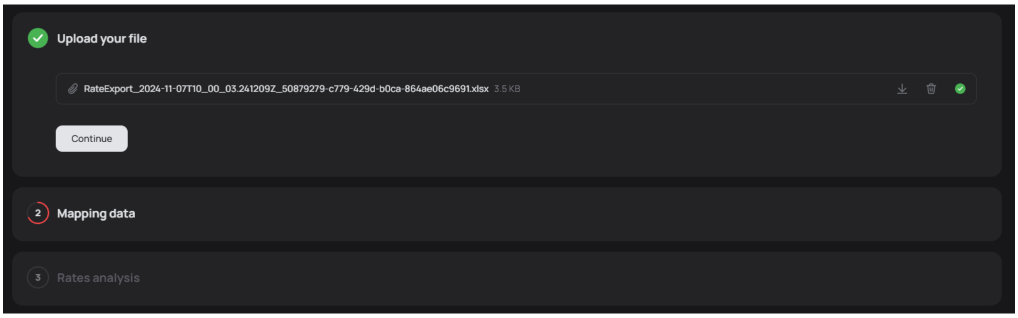
Each step is clickable. You can return to any step.

The *Upload your file* step contains a window for uploading a rate file in csv, xls, or xlsx format (the maximum file size is 10mb). Click the *Drop File* button or drag the file into this window.



Import Vendor Rates> Step 1 Upload your file

You can delete the uploaded file and upload a new one.



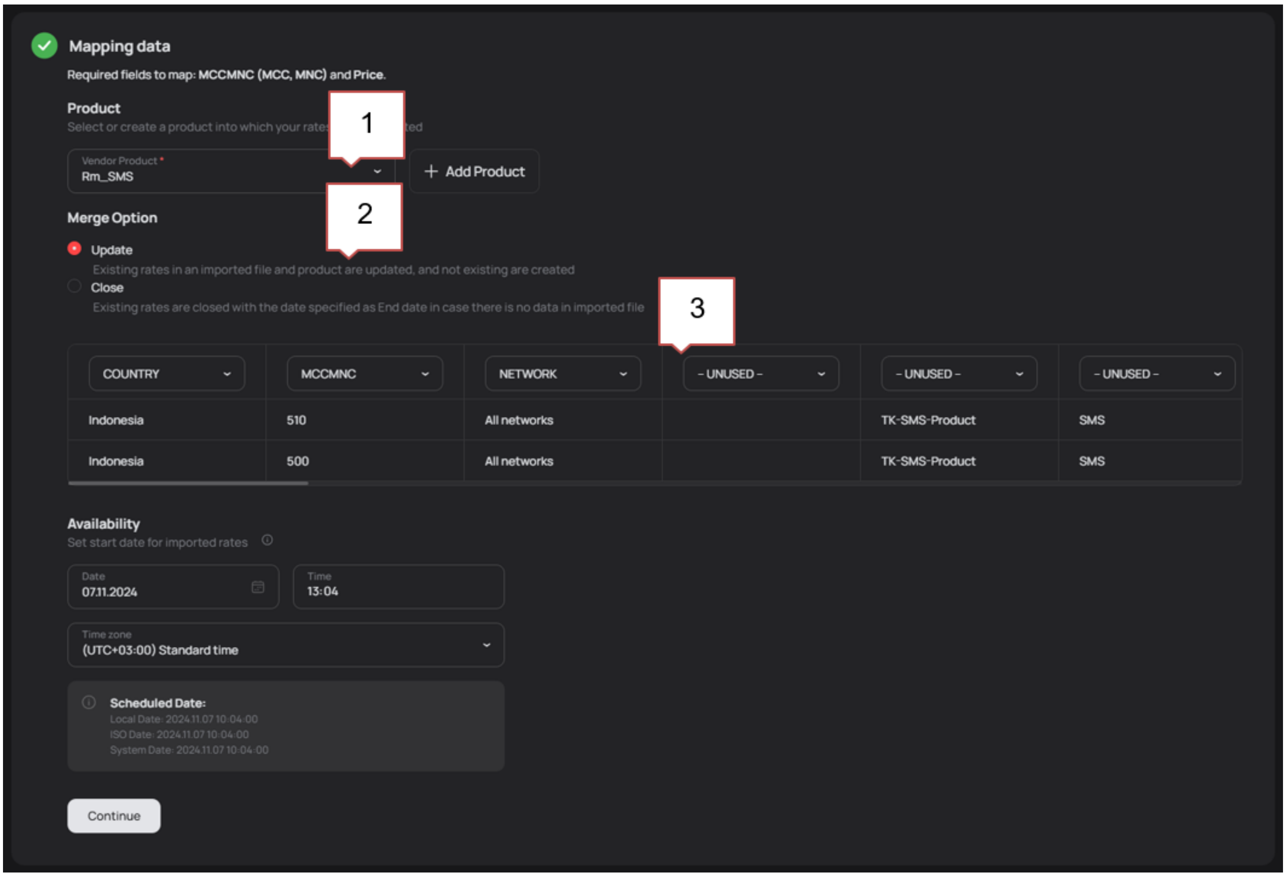
Import Vendor Rates> Step 1 Upload your file

When uploading a file, the System will parse it and present it as a preview at the *Mapping Data* step.

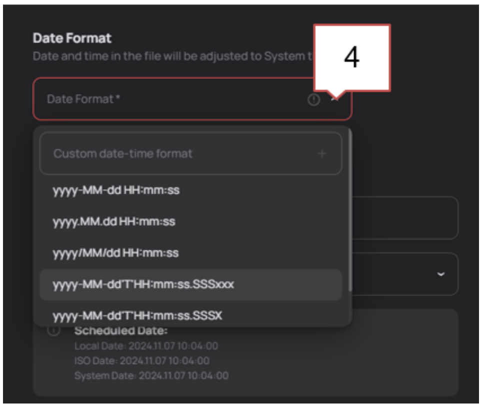
At the *Mapping Data* step do the following:

1. Specify the vendor product in which the rates will be imported.
2. If rates already exist in the product, the System will offer the *Merge Option* with the following values:
   - *Update*: when activated, existing rates in the imported file and product are updated and those that are not available in the System are created. Generally it is used to update the *Start & End Date*, and rates (three fields in any combinations). It is selected by default.
   - *Close*: when activated, existing rates are closed with the end date specified by the user (in case there is no end date in the imported file). The *Close* mode closes matching rates with the selected dates. If the start and end dates are not specified in the file, it they are taken from the *Start date* fiend. If the *End date* field is empty, this rate will be considered to be infinitely valid.
3. Match the columns. The required columns are *MCCMNC* and *Price*, but the user can also specify: *Country*, *Network*, *Start & End Dates*, *Price*, *MCC*, and *MNC*.
4. When matching the *Start & End Date* columns, select the date format so that the date/time in the file is the same as the System time zone.

5. Set the *Start Date/Time/Time Zone* for the imported rates.



Import Vendor Rates> Step 2



Import Vendor Rates> Step 2

After filling in all the required parameters, click the *Continue* button to proceed to the *Rates analysis* stage.

Before confirming the rate import, the System will display a preview of import results (the number of found, updated, new and closed rates). Correlation with network countries is performed according to the internal e.212/e.164 Reference Book 84.

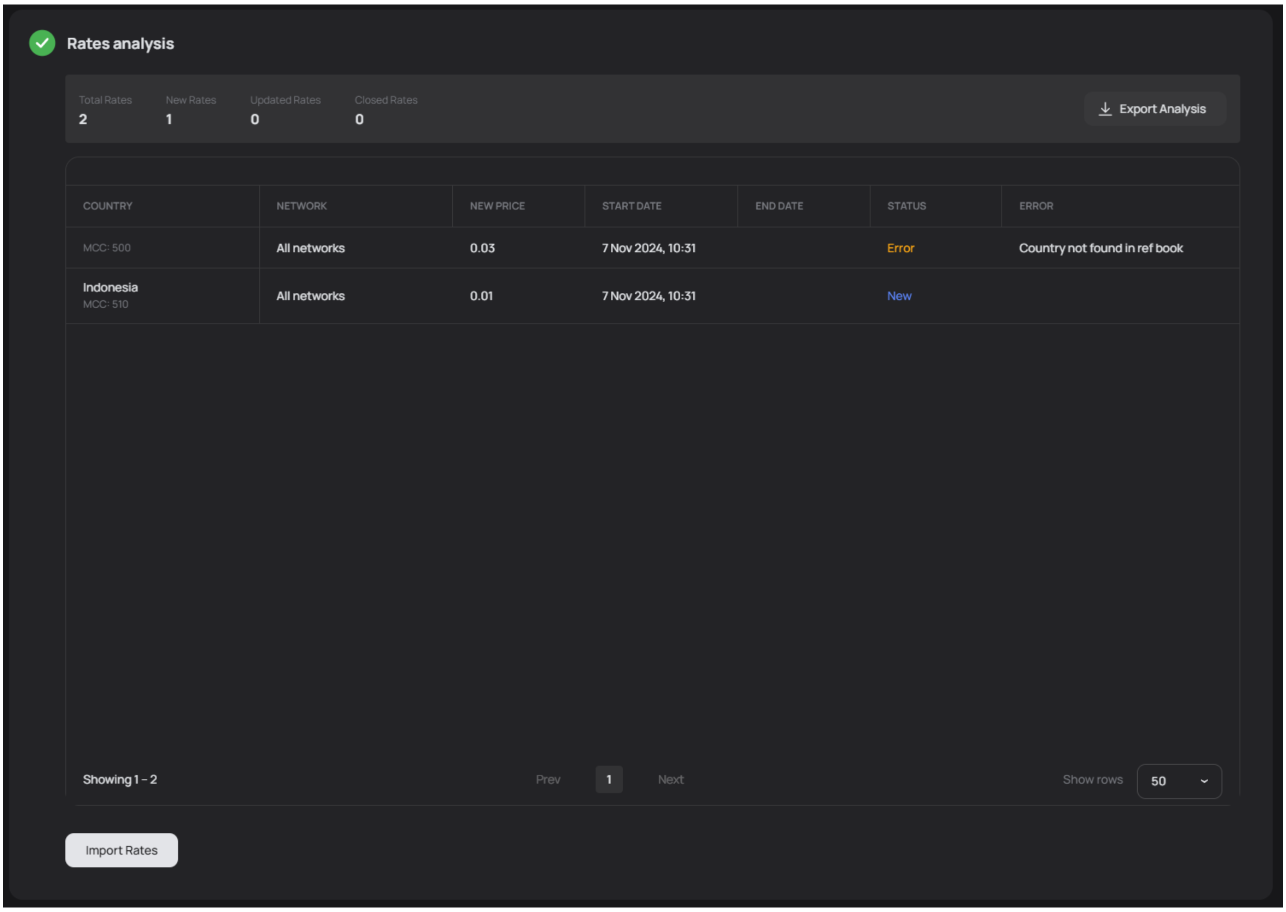
When importing a rate with a period overlapping with the existing one, the rate is divided into two rates with the statuses *increase/decrease/same* and *new.*

The import summary contains the following values:

- *Total rates*: the total number of imported rates.
- *New Rates*: the number of rates with the *New* status.
- *Updated Rates*: the number of rates with the status *Increase*, *Decrease*, *Same.*
- *Closed Rates*: the number of rates with the status *Closed*.
- *Import Analysis*: a button that serves to download a file with the analysis results.

The following statuses are available:

- ***New***: a rate that did not exist before and was added to the System as a result of import. It is displayed in blue.
- ***Same***: a rate that already existed in the System and was not changed during import (the period itself may have been reduced/expanded). This rate is updated during import, but remains unchanged. It is displayed in white.
- ***Increase***: a rate the price of which has increased compared to the previous value. It is displayed in red.
- ***Decrease***: a rate the price of which has decreased compared to the previous value. It is displayed in green.
- ***Closed***: a rate that was closed as a result of importing new data, that is, all periods that were available for this direction after *activeTill* are deleted. It is displayed if the *Close* option is selected, when the old rate is closed on the specified date and is replaced by a new rate. It is displayed in white.
- ***Error***: a rate that cannot be imported. It is displayed in yellow. The table will contain a description of the error. (For example, "Start Date is before now", "End Date is before Start Date").



Import Vendor Rates> Step 3

Click the *Import Rates* button, and the rates will be loaded into the System. The *Cancel* button is used to cancel the action.

9 Finance

The *Finance* interface is intended for tracking payments and can also serve as an interface for reconciling the balance for the billing period.

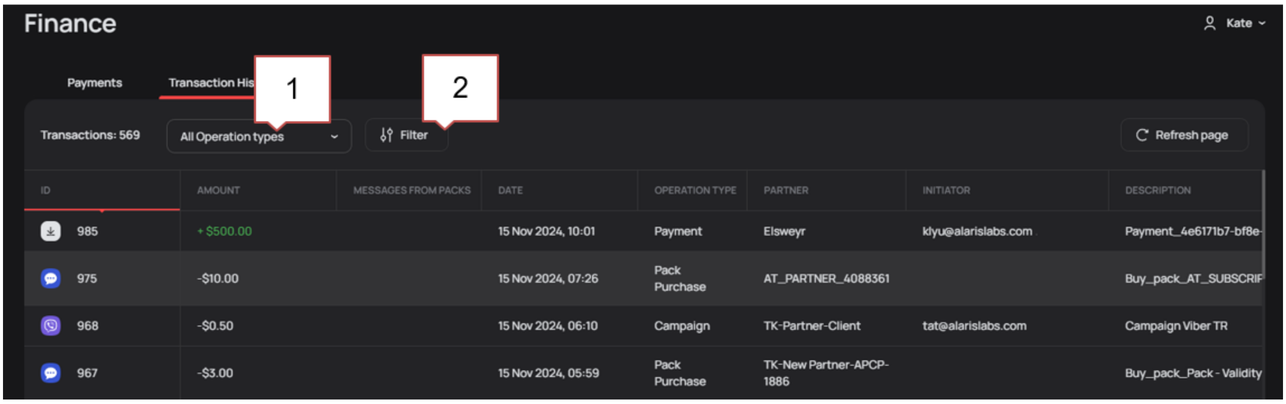
Payments can be manual (a higher-level partner can make a payment for a lower-level partner) and automatic (using PayPal/Stripe payment systems). A manual payment can be made only by an higher-level partner for his subordinate partners:

- In case an higher-level partner tops up the balance of a lower-level partner, the payment must be entered manually by the higher-level partner with a plus "+" sign. As soon as the payment has been entered, the lower-level partner will receive the same payment with a plus "+" sign.
- In case the lower-level partner's balance is decreased by the higher partner, the payment must be manually entered by the higher-level partner with a minus "-" sign. As soon as such a payment has been entered, the same payment with a minus "-" sign will appear for the lower-level partner.

The interface consists of two tabs:

- Payments53: a table of all incoming and outgoing payments by partners.
- Transaction History55: a table with the history of balance changes within the portal (sending campaigns, buying packs, replenishment of balance by the client through the PayPal/Stripe payment system, manual replenishment of balances of lower-level partners to higher-level ones, as well as "gift" top-ups during self-registration).

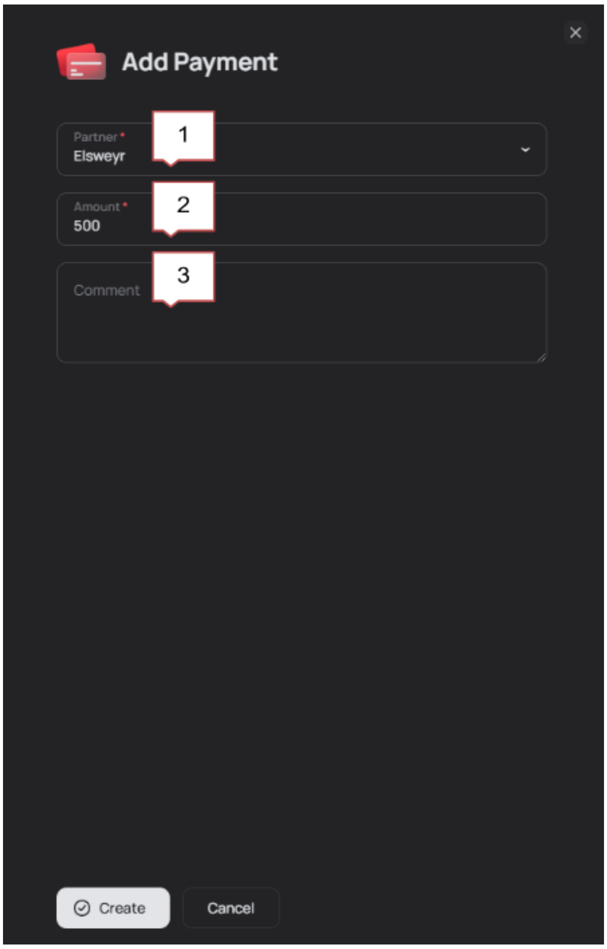
9.1 Payments



Finance > Payments

The user can:

1. Use the filter to display relevant records.
2. Click the *Add Payment* button located in the top right corner and add a new manual payment.
3. Edit payments (for manual payments only). To do this, hover your mouse over the record and select the required action:



Add Payment

To add a new manual payment fill in the following parameters:

1. Specify the partner to which the payment is added.
2. Specify the payment amount. You can enter a payment with the minus "-" sign.
3. Specify a comment if necessary.

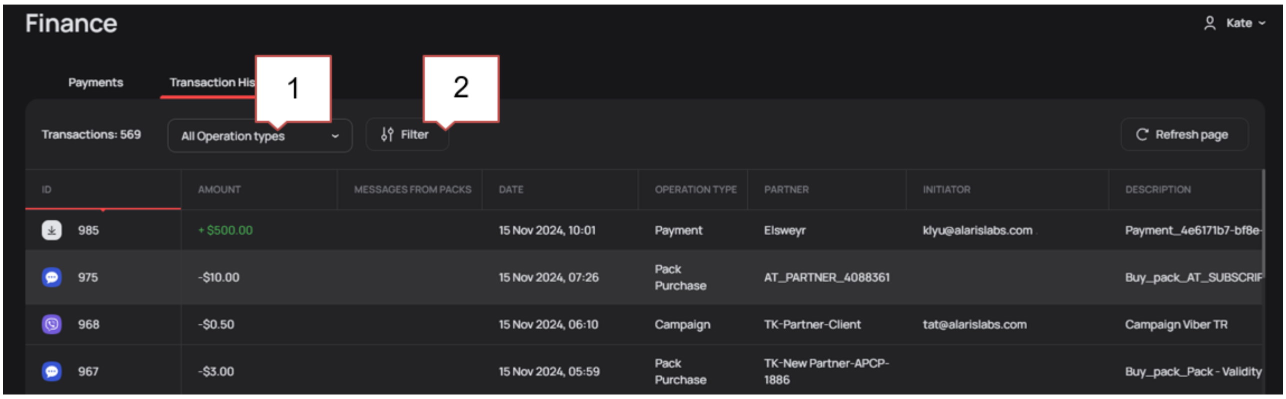
After filling in the parameters click the *Create* button. The *Cancel* button serves for canceling the action.

When editing payments the user can:

- Cancel a payment by clicking the *Cancel Payment* button without confirming the action.
- Add a comment by clicking the *Add Comment* button. Other parameters are not available for editing.

After editing the required parameters click the *Save* button to save the changes or the "x" button in the top right corner of the window to cancel the action.

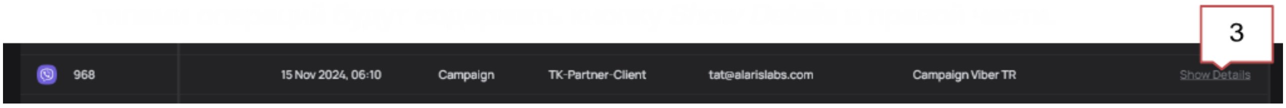
9.2 Transaction History

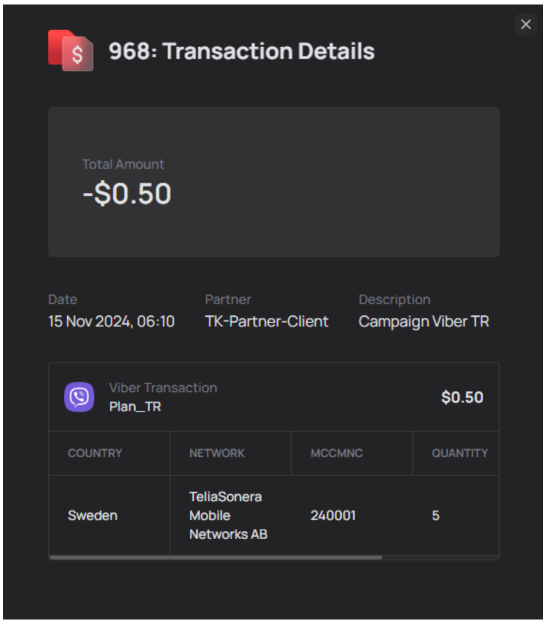


Finance > Transaction History

The user can:

1. Use a quick filter by operation type to display relevant records. The following operation types are available:
   - *Campaign*: charged when sending campaigns (with the "-" sign).
   - *Pack purchase*: charged when buying packs (with the "-" sign).
   - *Balance top up*: charged when the balance is topped up (with either the "+" or "-" sign).
   - *Payment*: manual or automatic payment (with either the "+" or "-" sign).
   - *API*: charged when sending campaign messages through an API (with the "-" sign).
   - *Reply to MO*: charged when sending automatic responses to MO messages (with the "-" sign).
2. Use the general filter to display relevant records.
3. View details for *Reply to MO*, *Campaign* and *API* type operations. Rows with these operation types contain the *Show Details* button on the right side.





Transaction Details

10 Sender IDs

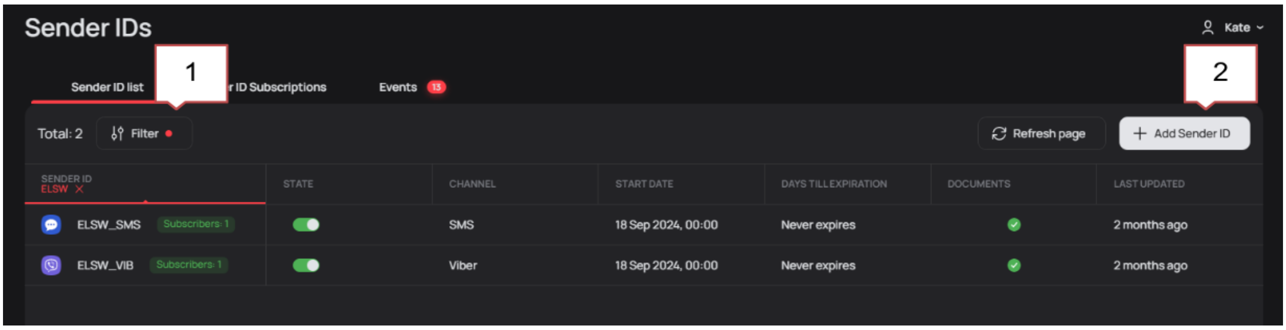
The Sender IDs interface is designed for the System owner to work with Sender IDs (SIDs). Sender IDs are required for end-user companies of Campaign Portal to launch SMS campaigns. Sender IDs help recipients to identify the sender company and build further interaction with it (including interaction outside of the System).

Sender IDs are requested in Campaign Portal by the end-user companies of campaign portals from their administrator, either the System owner or the Reseller. Sender IDs requests are passed from the user company up the reselling chain to the System owner. The system owner decides whether to register the Sender ID with appropriate operators or services (Viber/Whatsapp/other) and passes this decision down the same chain, after which the sender's name can be used to send the campaign.

The interface consists of the following tabs:

- *Sender ID list*: contains information about the current list of employed and registered Sender IDs, allows creating new ones, tracking the usage of current ones and turning off unused ones.
- *Sender ID Subscriptions*: allows the user to bind Sender IDs to partners as well as unbind Sender IDs from partners.
- *Events*: contains all Sender ID events that imply some action on the part of the administrator. It contains Sender ID registration requests, unsubscribe events and subscription detail updates.

10.1 Sender ID list

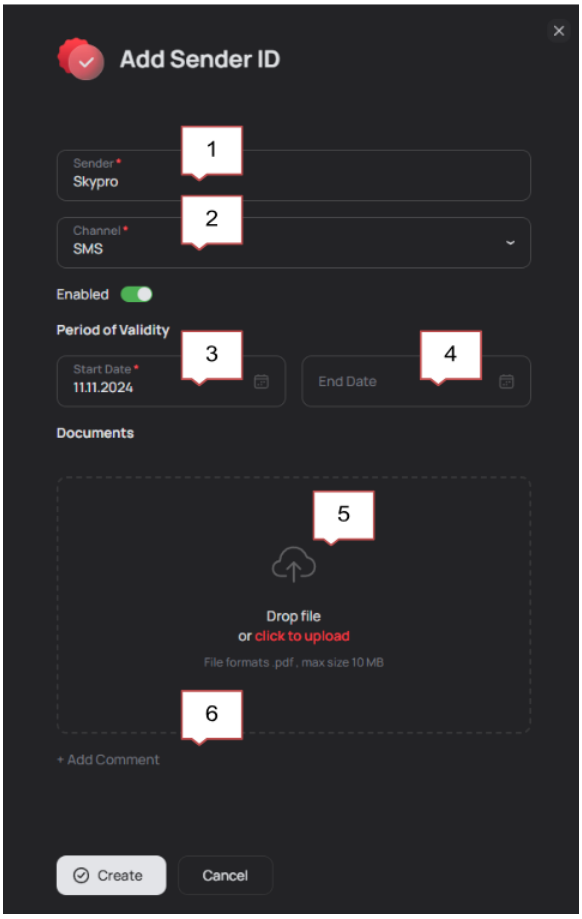


SenderID list

The *Sender ID list* tab consists of a table with a list of all Sender IDs that the System owner has.

The user can:

1. Use a filter to display relevant entries.
2. Click the *Add Sender ID* button located in the top right corner and add a new Sender ID.
3. Edit Sender IDs. To do this, click on the context menu and select the required action.



Add Sender ID

To add a new Sender ID, fill in the following parameters:

1. Specify the sender name.
2. Select the delivery channel.
3. Select the Sender ID start date.
4. Select the Sender ID start expiry date (if necessary).
5. Upload the documents required for registration.
6. Add a comment if necessary.

After filling in the parameters, click the *Create* button. When creating new Sender IDs, uniqueness is verified: there cannot be two Sender IDs with the same name in the System. The *Cancel* button serves to cancel the action.

When editing a Sender IDs, the user can only change its status, the start/end date and add, download or delete attached documents.

NOTE: For the Reseller, this table contains a list of all Sender IDs that have been submitted to this Reseller. In this interface, the Reseller can request a Sender ID from a higher-level partner (for example, the System owner) by the *Request Sender ID* button.

Request Sender ID

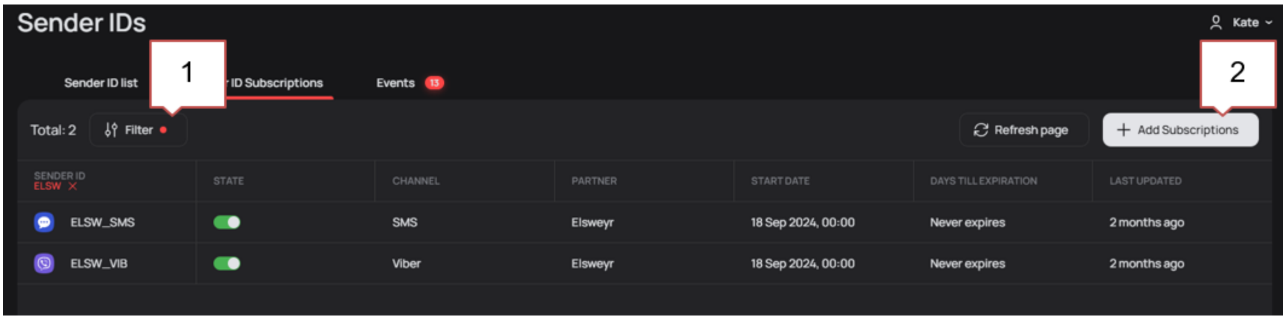
To request a new Sender ID, fill in the following parameters:

1. Specify the Sender ID name.
2. Select the delivery channel.
3. Add a comment if necessary.
4. Upload the documents required for registration.

After the SID request is created, the System owner or a higher-level Reseller will have a new event for Sender ID approval in the Events 61 tab.

NOTE: If the System owner has created custom fields for the Sender ID request form in the Form Customization 81 interface for the contract company to which the Reseller belongs, these fields will be displayed to the Reseller when a new Sender ID is requested. Custom fields are always displayed after System fields.

10.2 Sender ID Subscriptions

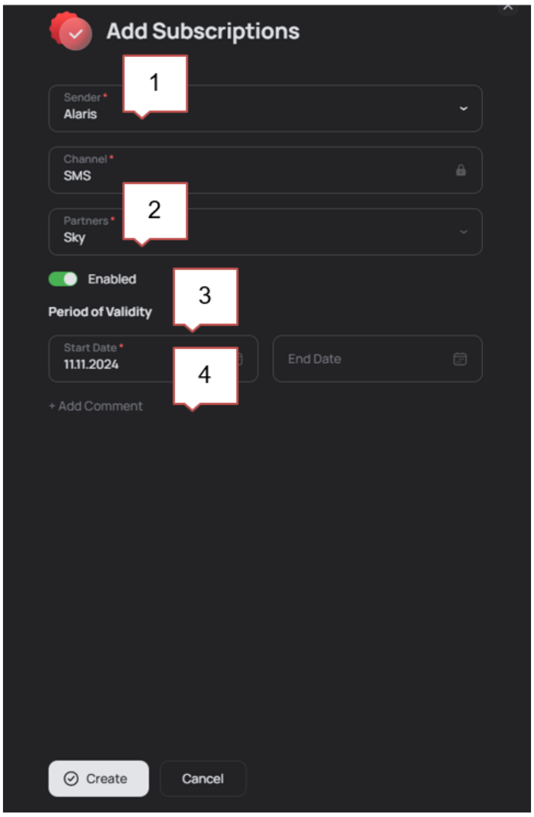


Sender ID Subscriptions

The *Sender ID Subscriptions* tab displays subscriptions of the System owner's or Reseller's partners to the Sender IDs available to the System owner.

The user can:

1. Use the filter to display relevant records.
2. Click the *Add Subscriptions* button located in the top right corner and add a new Sender ID subscription to the partner.
3. Edit Sender ID subscriptions. To do this, click on the context menu ⋮ and select the required action.



Add Subscriptions

To add a new subscription to a sender name, fill in the following parameters:

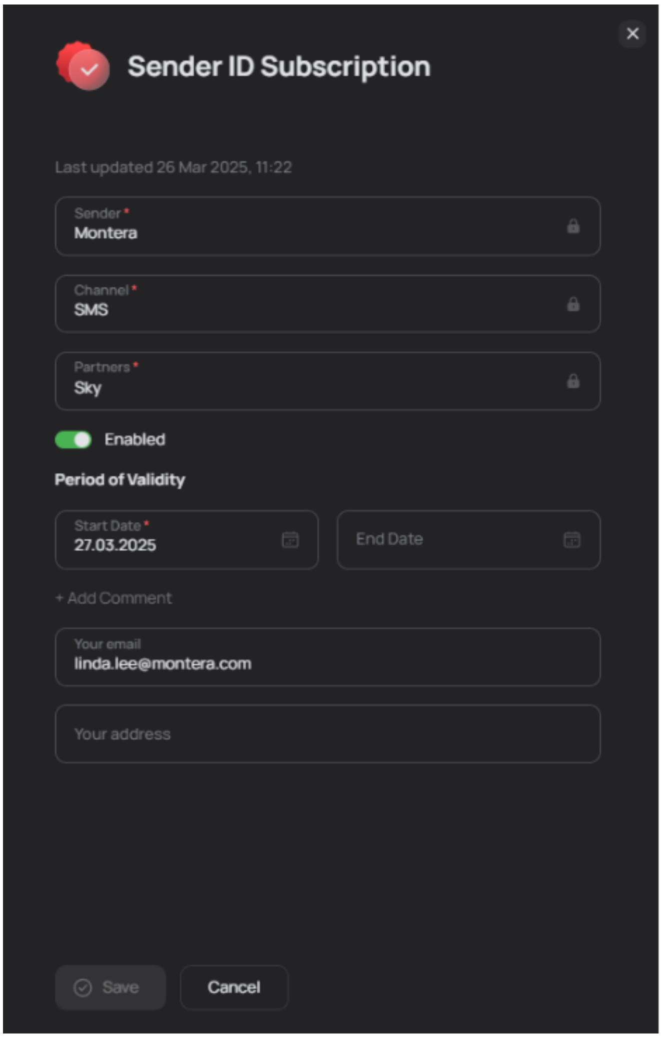
1. Select the Sender ID. The channel will be filled automatically, based on the Sender ID channel.

2. Select the partner.
3. Specify the start and end date of the subscription.
4. If necessary, add a comment.

After filling in the parameters click the *Create* button. The *Cancel* button is intended for canceling the action.

When editing a subscription, the user can change only its start and end dates.

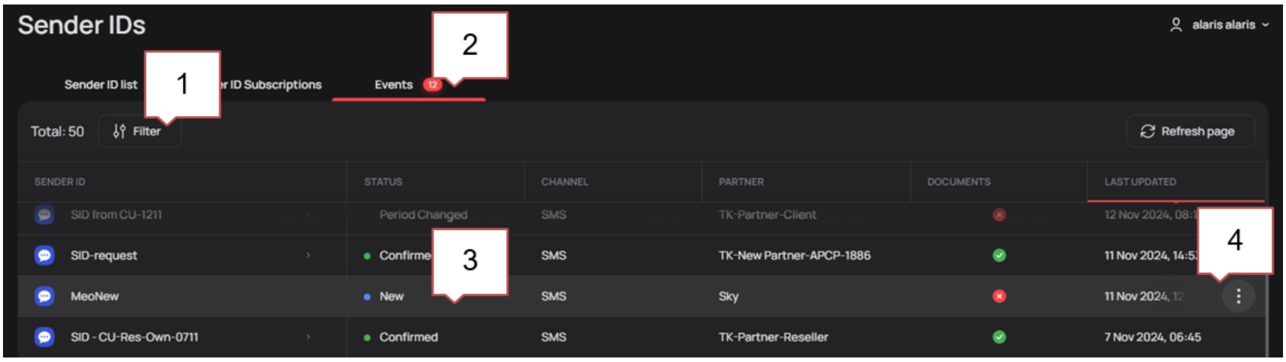
NOTE: If the System owner has created custom fields for the Sender ID request form in the Form Customization 81 interface, these fields filled by users will be displayed in the Sender ID Subscription window as illustrated below.



Sender ID Subscription window

10.3 Events

The *Events* tab consists of a table with a list of Sender ID-related events. The number of pending events is displayed next to the *Events* tab.



Events

The user can:

1. Use a filter to display relevant records.
2. View the number of pending events.
3. View the status of a Sender ID approval requests.
4. View, approve and reject requested Sender IDs. To do this, click on the context menu ⋮ and select the required action. The pool of available actions depends on the Sender ID request status.

For the System owner account, four statuses are available - *New*, *Confirm*, *Put in Progress* and *Decline*. The following actions are available for the *New* status:

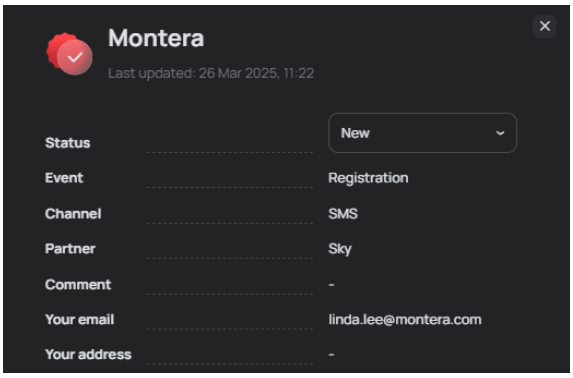
- *View*: view the Sender ID registration request.
- *Confirm*: approval of the Sender ID registration request. The request changes its status to *Confirmed*.
- *Put in Progress*: the request is in progress. The request changes its status to *In Progress*, from which the following actions are available to the System owner: *Confirm* or *Decline*.
- *Decline*: the request for Sender ID registration has been declined. When selecting the action, a window is displayed for specifying a comment with the reason for the decline. This comment is displayed to the Reseller (if the request was originated by a Reseller) or to the end user (if the request was originated by an end user). The request changes its status to *Declined*.

A Reseller can have two types of applications:

1. *Partner Event*: a request from a partner (end user or downstream Reseller). Partner Events can have the following three statuses - *New*, *Confirm* and *Decline*. For the *New* status, the following actions are available:
   - *View*: view the Sender ID request.
   - *Confirm*: approve the Sender ID request. When selected, the request changes its status to *Confirmed* and a new request of the *My Event* type is created to the System owner with the *New* status. When approving the request, the System owner selects the start and end dates of the SID.
   - *Decline*: denial of the Sender ID registration request. When selected, an edit box is displayed to indicate a comment with the reason for the decline. This comment is displayed to the Reseller or end user that originated the request. The request changes its status to *Declined*.

2. *My Event*: a request to the System owner from the Reseller. This request is created in two cases: if the Reseller itself creates a request for SID approval in the *Sender ID list* tab by clicking the *Request Sender ID* button, or if the Reseller has selected the *Confirm* action on a downstream partner's request. *My Events* can take one of the two statuses: *New* or *Cancel*. For the *New* status, the following actions are available:
   - *View*: view the Sender ID request.
   - *Cancel*: cancel the the Sender ID request by a higher-level partner. The request changes its status to *Cancelled*.

NOTE: If the System owner has created custom fields for the Sender ID request form in the Form Customization 81 interface, these fields filled by users will be displayed in the event window as illustrated below.



Event window

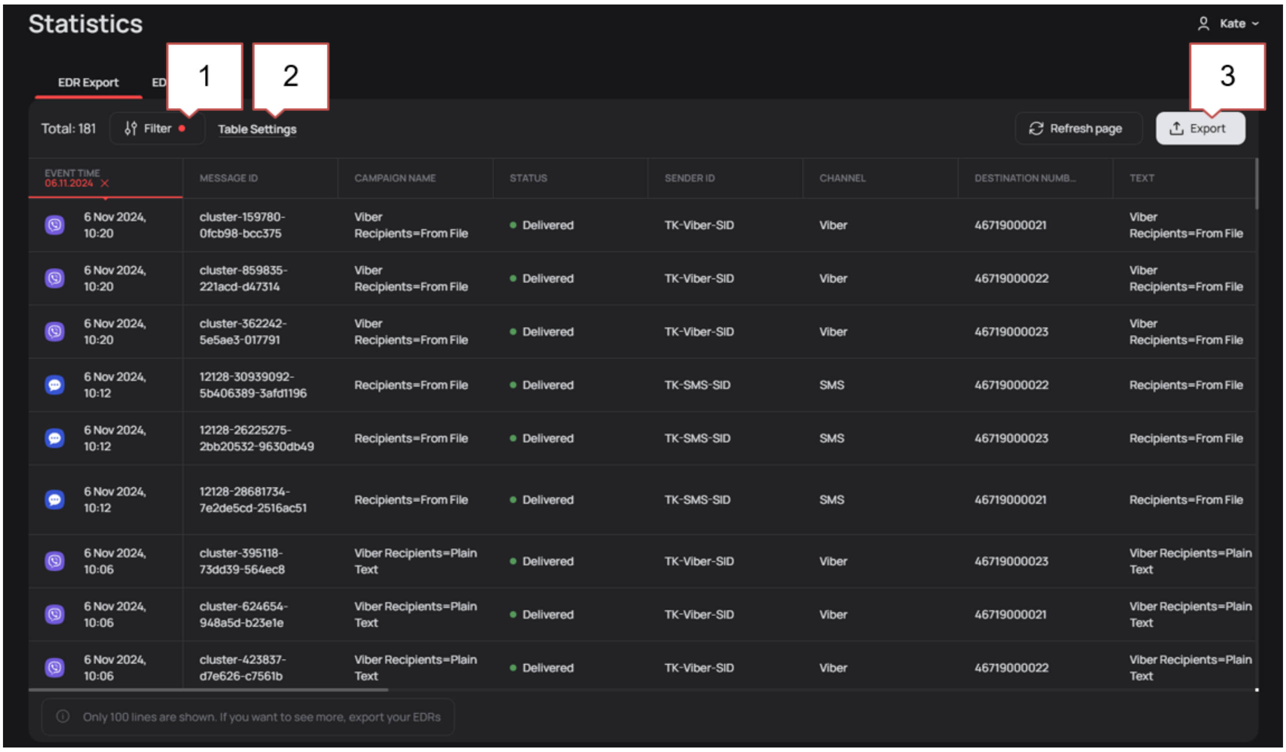
11 Statistics

The *Statistics* interface serves to manage EDR records. The interface allows the System owner and Reseller to filter and upload event detail records (EDRs) to the web interface or export them to a file. These records are necessary for reconciliation and retrospective analysis of traffic that passes through the System owner or Reseller.

The interface consists of 2 tabs:

- *EDR Export*: table with data that were selected as a result of applying filtering parameters.
- *EDR Export Task*: table of EDR export tasks that were sent to e-mail or exported to files that can be viewed and downloaded from the interface to a computer.

11.1 EDR Export



EDR Export tab

By default, 100 records are displayed for the current date.

The user can:

1. Use a filter to display relevant records by clicking the *Filter* button. Filtering is available for all values. Viewing filtered EDRs is available without any special action, that is, any fields are filled in and the table displays the corresponding EDRs filtered by that field.
2. Customize the display of the required columns by clicking on *Table Settings* (details on customizing columns are described in the *Campaign Portal User`s Guide* in the *Contacts* interface section). Unload the required records by clicking the *Export* button. The file will contain the set of columns that was selected in the interface.
3. Open a window with detailed information on any EDR by double-clicking on any row.

Export

In the window that appears, perform the following steps:

1. View the number of EDRs that will be exported.
2. Select the required EDR fields for export.
3. Select the type of export: prepare file for download only, or additionally send file by email. If sending by email is required, enter an email address in the *Send file by email* field. You can enter several addresses separated by commas. The file will be sent to email only if the file size does not exceed 25 MB. If the field is empty, the file will be downloaded to your computer.
4. To start exporting, click the *Export* button. The *Cancel* button serves to cancel the action.

EDR Export

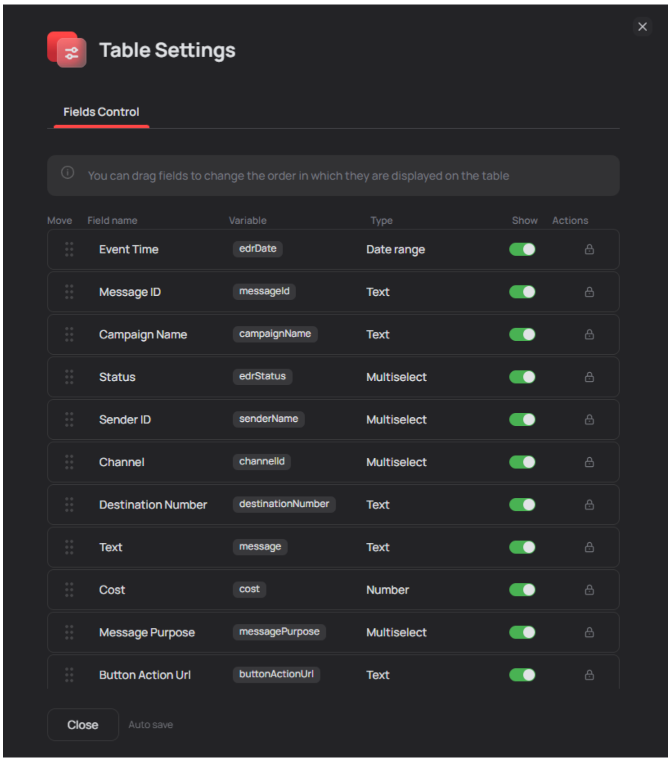
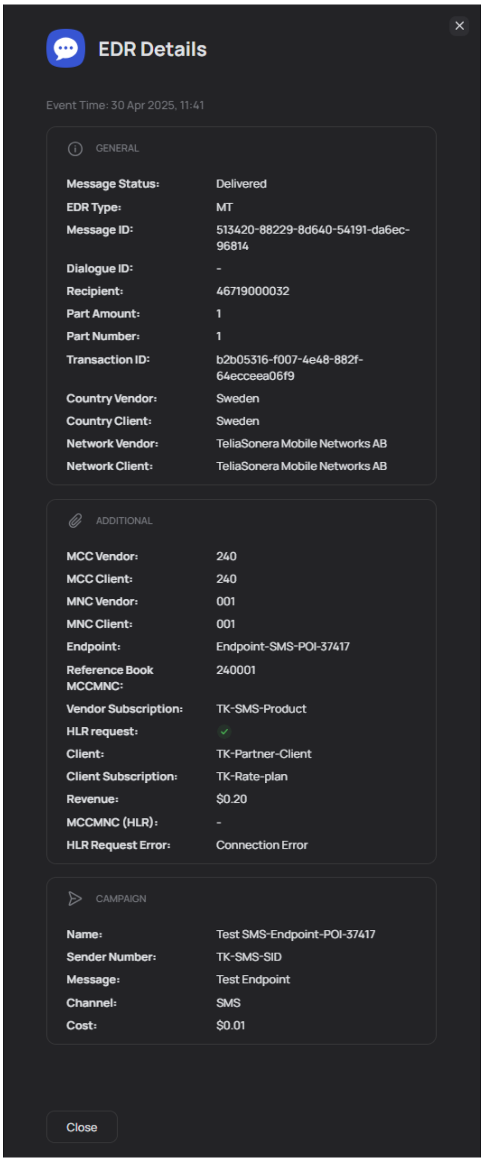
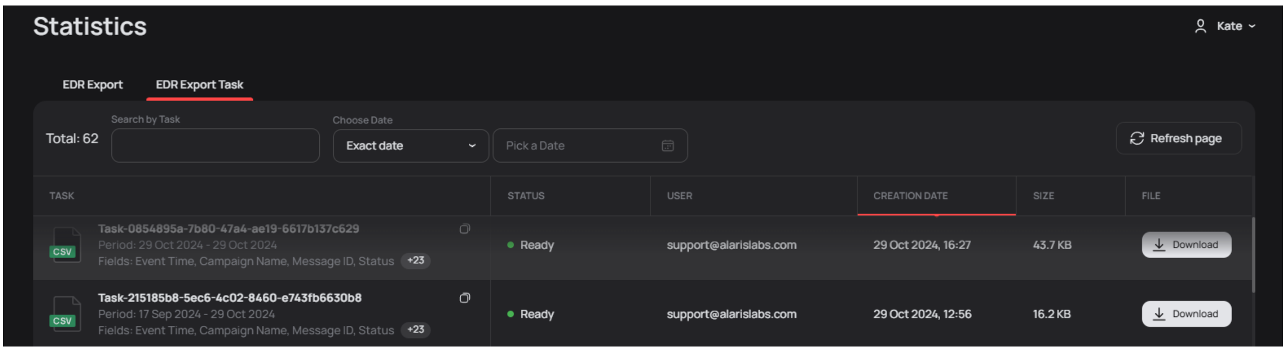


Table Settings



EDR Details

11.2 EDR Export Task



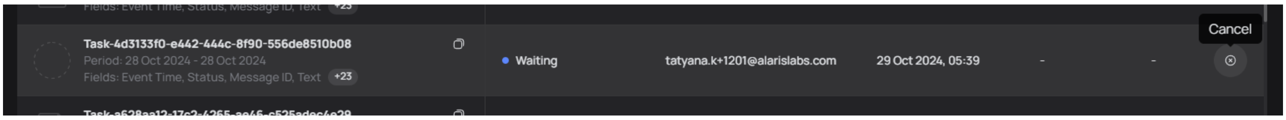
EDR Export task

The user can:

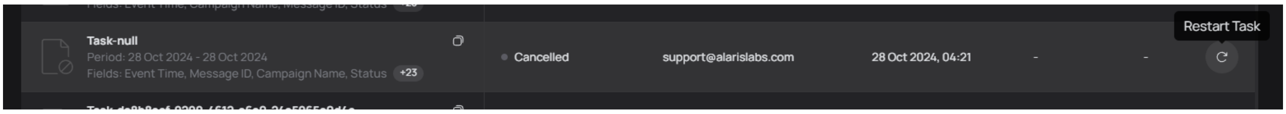
1. View the status of the task. Possible values are:

- *Waiting*: the file generation task is in progress.
- *Ready*: the file generation task is completed.
- *Sent*: the file generation task has been completed and the file has been emaled.
- *Cancelled*: the task is canceled by the user.
- *Failed*: the file generation task is executed with errors.

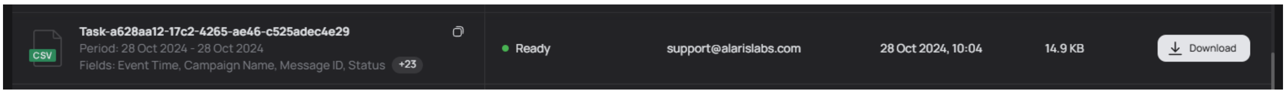
2. Cancel the task if it is in the *Waiting* status.



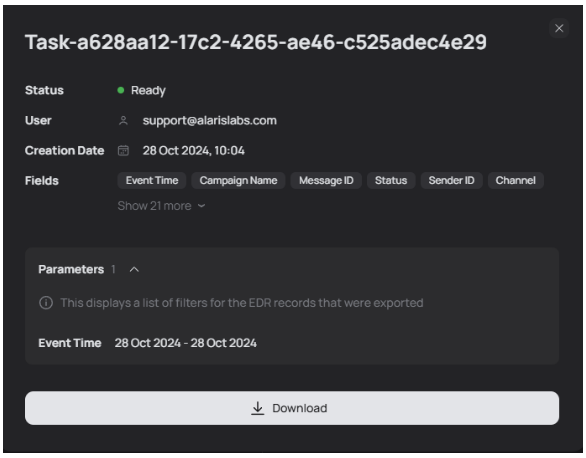
3. Restart the canceled task.



4. Export a file with EDRs.



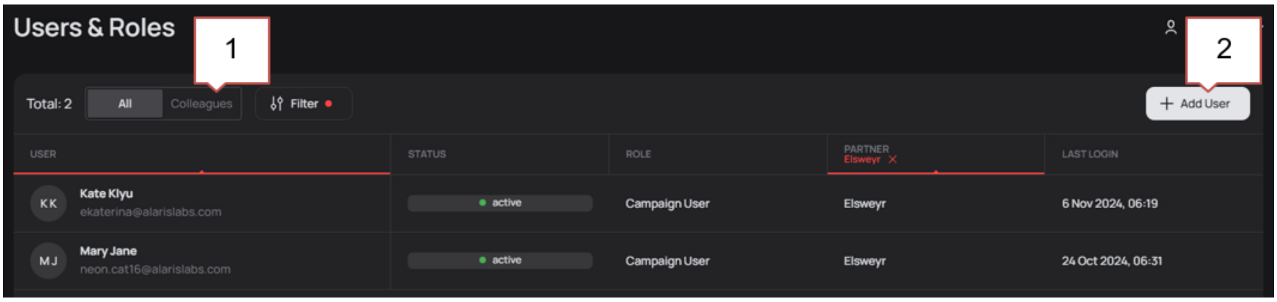
5. Open the window with details by double-clicking on any row.



12 Users&Roles

The *Users&Roles* interface is designed to manage your own company users and those of your partners (Resellers and end users).

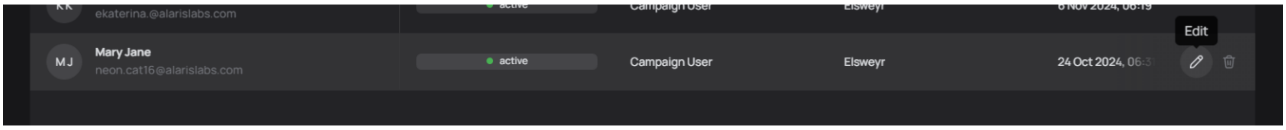
You can create users for both Admin Panel and Campaign Portal, so it is possible to manage both sets of roles and permissions.

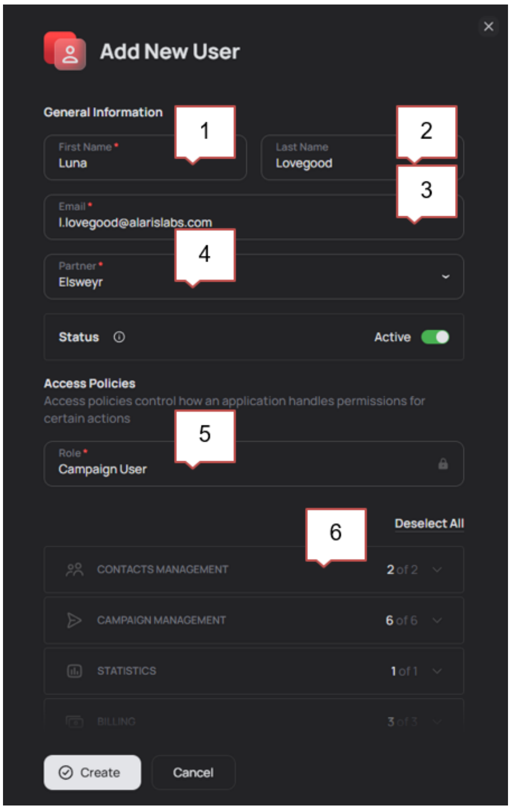


Users & Roles

The user can:

1. Use the filter to display the relevant records.
2. Click the *Add User* button in the top right corner and add a new user.
3. Edit or delete users. To do this, hover the mouse over the record and select the required action as illustrated below:



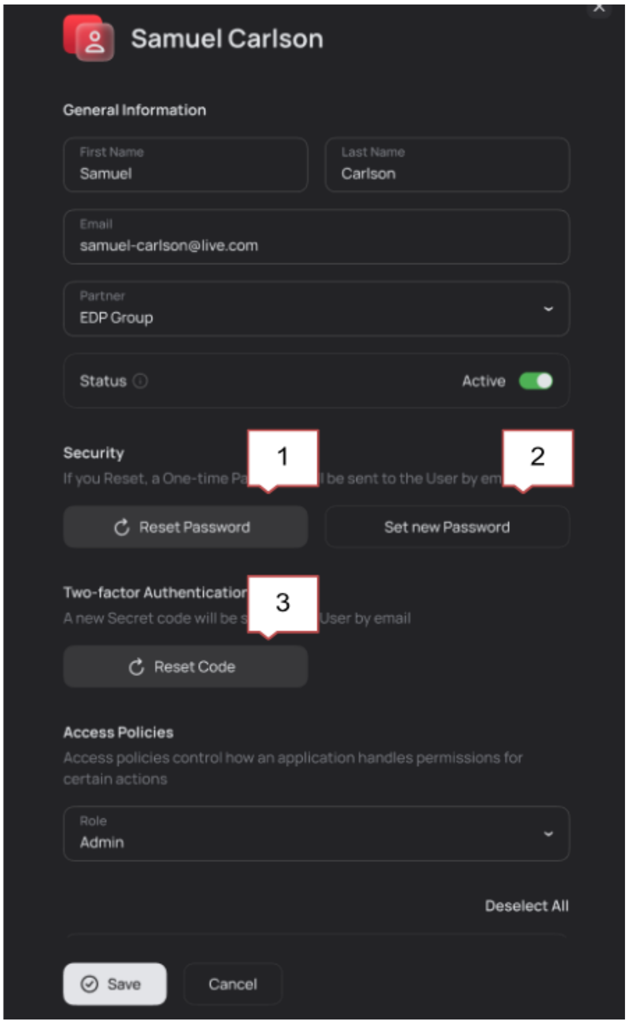


Add New User

To add a new user fill in the following parameters:

1. Enter the user's first name.
2. Enter the user's last name.
3. Enter the user's e-mail address.
4. Select the partner to which the user belongs.
5. Select a role (for more detail refer to Roles [71]):
   - When selecting an *End User partner*, the role will automatically be set to *Campaign User* and cannot be changed.
   - When selecting a *Reseller partner*, the role will automatically be set as *Admin* cannot be changed.
   - When selecting the *Colleague to the current* user, the user will be created for the current portal.
6. Specify which permissions will be available to the user (for more detail refer to Permissions [72]).

After filling in the parameters, click the *Create* button. When creating new users, uniqueness is verified. The System does not allow two users with the same e-mail addresses. After successful verification the user will receive a letter of completed registration, a link to the portal and a link to specify a new password. The *Cancel* button serves to cancel the action.



Edit New User

When editing a partner, the user can change everything except *Partner*. The *Edit* form additionally allows the user to:

1. Reset the password.
2. Manually change the password.
3. Reset the secret code for 2FA (if the option is enabled on the portal).

In order to change your e-mail address, specify the new address in the *Email* field, save the changes and then click the *Reset user`s password by e-mail* button. You will receive an e-mail to the new address with a link to change the password for your account. Then your can log in with the new email.

After editing the required parameters, click *Save* to save the changes or click on *Cancel* to cancel the operation.

NOTE: If the System owner has created custom fields for the registration form in the Form Customization 81 interface for a contract company to which the user's partner belongs, the data filled by the user in these fields will be displayed in the *Users* interface.

12.1 Roles

The following five roles are available for Admin Panel in the System. Each of them includes a set of predefined permissions (see Permissions 72):

- *Administrator*: Manage Contract Companies, Manage Reference book, View & Edit Portals, View & Edit Users, View & Edit SenderIDs, Edit Partners, View & Edit Subscriptions, View & Edit Vendor Product, View &, Edit Vendor Endpoints, Manage Payment Systems, View & Edit Payments, View Transaction History, View Statistics, Manage URL Shortener, Manage HLR, Manage Forms Customization
- *Client manager*: View & Edit Users,View SenderIDs, Edit Partners, View Subscriptions, View Payments, View Transaction History, View Statistics
- *NOC*: Manage Reference book, View & Edit Portals, View & Edit Users, View & Edit SenderIDs, View & Edit Vendor Endpoints, Manage Payment Systems
- *Rate/Routing manager*: View & Edit Subscriptions, View & Edit Vendor Product, View &, Edit Vendor Endpoints
- *Finance Manager*: Manage Payment Systems, View & Edit Payments, View Transaction History

The specifics for System owners and Resellers are as follows:

Since both administrators and Resellers work in the Admin Panel, they have an identical user interface implemented. The only difference is the ability to create downstream resellers, which is regulated by the corresponding role.

A higher-level partner can create an administrator user for a lower-level reseller partner with all permissions enabled without the ability to turn them off. The administrator that is a colleague of the current reseller has the permission switches available.

Reseller roles have the following visibility limitations:

Resellers do not have access to edit/view some entities, and therefore they do not have the corresponding roles:

- *Administration → Manage Reference book*
- *Routing Management → View Vendor Endpoints*, *Edit Vendor Endpoints*, *Edit Vendor Products*.

For Campaign Portal, only one role has been added to the System. By default, self-registered users will be granted all permissions. To disable any permissions for a user, the System owner will need to go to the Users & Roles 69 interface and disable access manually.

- *Campaign User*: View & Edit Contacts, View & Edit Campaigns, View & Edit Templates, View & Edit IDs, View Statistics, View & Edit Sub, View Tr History, API Connections, Manage URL Shortener

12.2 Permissions

The following permissions exist in the System.

Admin Panel

Administration

Interface	Description
Manage Contract Companies	Full access to the Contract Companies 87 interface: view, create, edit and delete contract companies. If the permission is not granted, only viewing existing contract companies is allowed.

Interface	Description
Manage Reference book	Full access to the *Reference Book* tab in the e.212/e.164 Reference Book 84 interface: view and edit the Reference book. If the permission is not granted, only viewing existing entries is allowed.
Manage HLR	Full access to the *HLR* tab in the e.212/e.164 Reference Book 84 interface; availability of the *HLR* checkbox in the Partners > Options 20 interface. The *HLR* tab and checkbox are hidden if the permission is not granted.
View Portals	View the Portals 16 interface without the ability to perform actions with portals (create, edit, delete). If the permission is not granted, the Portals 16 interface is hidden.
Edit Portals	Full access to the Portals 16 interface: view, create, edit and delete portals and their settings. If the permission is not granted, and if *View Portals* is disabled, the Portals 16 interface is hidden.
View Users	View the Users&Roles 69 interface without the ability to perform user actions (create, edit, delete). If the permission is not granted, the Users&Roles 69 interface is hidden.
Edit Users	Full access to the Users&Roles 69: create, edit and delete users. If the permission is not granted, the Users&Roles 69 interface is hidden. If the permission is not granted, and if *View Users* is disabled, the Users&Roles 69 interface is hidden.
View SenderIDs	View the Sender IDs 57 interface (*Senders* and *Sender ID Subscriptions* tabs) without the ability to perform actions with sender names (create, edit, delete). If the permission is not granted, the Sender IDs 57 interface is hidden. The *Sender ID* column cannot be selected in the Statistics > EDR export 64 interface in the *Table Settings* tab and *EDR Export* form.
Edit SenderIDs	Full access to the Sender IDs 57 interface (*Senders*, *Sender ID Subscriptions* and *Events* tabs): all editing, creation of sender names and assigning them to partners. If the permission is not granted, and if *View SenderIDs* is disabled, the Sender IDs 57 interface is hidden.
Manage Forms Customization	Full access to the Form Customization 81 interface, adding, editing and/or deleting custom parameters. If not granted, the Form Customization 81 interface is hidden.

Partners

Interface	Description
Edit Partners	Full access to the Partners 20 interface: view, edit and delete a partner. To create a partner you need a combination of *Edit Partners* + *Edit Payments* permissions. If the permission is not granted, only viewing existing partners is allowed.

Statistics

Interface	Description
View Statistics	Full access to the Statistics 64 interface: view and export EDRs, view and export *EDR Export Task*. If the user does not have the *MO messages* option, the *Dialogue ID* column is not displayed. If the permission is not granted, the Statistics 64 interface is hidden.

Rate management

Interface	Description
View Subscriptions	View the Subscriptions 26 interface without the ability to perform actions with subscriptions (create, edit, delete), view subscription details, subscribers and *Import History*. Ability to see which subscriptions partners are subscribed to, look inside subscriptions and view rates. With this role you will be able to see the subscriptions in the interface of contract companies available to a specific company. It allows managing groups of subscriptions. If this role is not enabled, the Subscriptions 26 interface is hidden. In *Edit Partner* the subscriptions section is hidden and the *Add Entry* button is not available. In the Statistics 64 interface in *Table Settings* and in *EDR Export*, the *Client Subscription* column is not available for selection.
Edit Subscriptions	Full access to the Subscriptions 26 interface: view, create, edit and delete subscriptions and rates within them, assign subscriptions to a partner in the partner editing interface. Permission to customize the default subscription in the portal. If the permission is not granted, and View Subscriptions is disabled, the Subscriptions 26 interface is hidden.

Routing management

Interface	Description
View Vendor Product	View the Vendors → Products 38, Rates 46, Import History 47 interfaces without the ability to perform actions in the interface, but with the ability to export rates. If disabled, in the Vendors 38 interface, the *Products*, *Rates* and *Rate Import* tabs are hidden. In the *Statistics* interface in *Table Settings* and in *EDR Export*, the *Vendor Subscription* column is not available for selection.

Interface	Description
Edit Vendor Subscriptions	Full access to the interface Vendors → Products 38, Rates 46, Import History 47 interfaces: create, edit and delete vendor products, import rates to products. In the Statistics 64 interface in *Table Settings* and in *EDR Export*, selection of *Vendor Subscription* column is available. If the permission is not granted, and *View Vendor Product* is disabled, the *Products*, *Rates* and *Rate Import* tabs are hidden in the Vendors 38 interface.
View Vendor Endpoints	View the Vendors → Endpoints 39 interface without the ability to perform actions with endpoints, toggle without the ability to toggle state. The *Endpoints* field is available in the Statistics 64 (*EDR Export*) interfaces. If not enabled, the Endpoints 39 tab is hidden in the Vendors 38 interface. The *Endpoints* column selection is not available in the Statistics 64 interface in *Table Settings* and in *EDR Export*.
Edit Vendor Endpoints	Full access to the Vendors → Endpoints 39 interface: create, edit and delete Endpoints, the enable - disable toggle directly in the table. In the Statistics 64 interface in *Table Settings* and in *EDR Export* the *Endpoints* column selection is available. If not enabled, and if *View Vendor Endpoints* is disabled, the Endpoints 39 tab is hidden in the Vendors 38 interface.

URL Shortener

Interface	Description
Manage URL Shortener	Full access to the URL Shortener interface: view, create, modify or delete short domains. If disabled, the URL Shortener interface is hidden.

Finance management

Interface	Description
Manage Payment Systems	Full access to the Payment Systems 79 interface - view and edit payment systems. If the permission is not granted, only viewing existing payment systems is available.
View Payments	Viewing the Finance → Payments 53 interface without the ability to perform actions in the interface (creating manual balance corrections). If the permission is not granted, the Finance 53 interface is completely hidden.
Edit Payments	Full access to the permission is not granted: creation of manual balance corrections, display of the *Finance* section in the *Edit Partner* form. In the permission is not granted, and *View Pa*yments is disabled, the the permission is not granted interface is completely hidden.

Interface	Description
View Transaction History	View the Finance →Transaction History 55 interface. If the permission is not granted, the Finance →Transaction History 55 interface is hidden.

Campaign Portal

Contacts management

Interface	Description
View Contacts	Viewing the *Contacts* interface (*Contacts*, *Groups* and *StopList* tabs) without the ability to perform actions in the interface (creating contacts and groups, moving contacts to groups, importing and exporting contacts). The *Import History* tab is hidden. The *Contacts* view is hidden in the *Dashboard* interface. If the permission is not granted, the *Contacts* interface is hidden. The *Contact groups* tab is hidden in the *Campaign Wizard* interface at step 2.
Edit Contacts	Full access to the *Contacts* interface: view, create, edit or delete contacts/groups, import contacts/groups, add new *ContactFields* in the *Contacts* table settings. The *Import History* tab is available. The *Contacts* tile with the *Import Contacts* feature is available in the *Dashboard* interface. If not enabled, the *Contacts* view is hidden in the *Dashboard* interface. In the *Statistics* interface in *Table Settings* and *EDR Export*, the *Destination Number* column selection is unavailable, and in the *Finance* interface, the *Show details* option is hidden.

Campaign management

Interface	Description
View Campaigns	Viewing the *Campaign List* interface (campaign details, *Last Campaign* graph on the *Dashboard*) without the ability to perform actions in the interface (create campaign, repeat campaign, cancel campaign). If the permission is not granted, the *Campaign List* interface is hidden, in the *Statistics* interface in *Table Settings* and *EDR Export* the *Campaign Name* column is unavailable, in the *Finance* interface the *Show details* option is hidden. In the *Contacts* interface, if you perform actions with contacts (*Move to Group*, for example), the scheduled mailings will not be displayed.
Edit Campaigns	Full access to the *Campaign List* interface (create campaign, repeat campaign, cancel campaign, campaign details) and access to the *Campaign Wizard* interface. The *Dashboard* interface has the *Campaigns* view with the *Create Campaign* feature. If the permission is not granted, the *Dashboard* interface does not have the *Campaigns* button with the *Create Campaign* feature, and the *Campaign List* and *Campaign Wizard* interfaces are hidden.

Interface	Description
View Templates	View the *Templates* interface (list of templates and their details) without being able to perform actions in the interface. The *Reply Templates* tab is available if the user has the *MO messages* option enabled. If the permission is not granted, the *Templates* interface is hidden.
Edit Templates	Full access to the *Templates* interface: create, edit and delete templates, the Save template button in the *Campaign Wizard* interface at step 1. The *Reply Templates* tab is available if the user has the *MO messages* option enabled. If the permission is not granted, and the *View Templates* is disabled, the interface is completely hidden.
View SenderIDs	View the *Sender IDs* interface without being able to perform actions in the interface. The *SenderID* button with the *Add Sender ID* feature is not available in the *Dashboard* interface. If the permission is not granted, the *SenderIDs* interface is hidden.
Edit SenderIDs	Full access to the *Sender IDs* interface: the user can request new Sender IDs, and erform all other operations with them. The *SenderID* view with the *Add Sender ID* button is available in the *Dashboard*. If the permission is not granted, the *SenderID* view with the *Add Sender ID* button is not available in the *Dashboard* interface. In the *Statistics* interface in *Table Settings* and in *EDR Export* the *Sender ID* column selection is not available. In the *Finance* interface, the *Show details* option is hidden. The user can still use previously registered SenderIDs when sending campaigns. In the *Campaign Wizard* interface, the *No Sender IDs found* message is shown.

Statistics

Interface	Description
View Statistics	Full access to the *Statistics* interface: view and unload EDR records, view and unload *EDR Export Task*. If the user does not have the *MO messages* option, the *Dialogue ID* column is not displayed. If the permission is not granted, the *Statistics* interface is hidden.

Billing

Interface	Description
View Purchased Subscriptions	View the *Purchase* interface (view the details of purchased packs and plans) without the possibility to purchase new subscriptions. If the permission is not granted, the *Purchase* interface is hidden. Purchased packs/plans and the *Add New* button are hidden in the *Dashboard* interface.

Interface	Description
Edit all Subscriptions	Full access to the *Purchase* interface: view and purchase available packs and plans, view details of purchased packs and plans. The *Dashboard* interface displays the purchased packs/plans and the *Add New* button. If the permission is not granted, the user cannot purchase new plans or packs.
View Transaction History	View the *Finance* interface (transaction history, transaction details). If the permission is not granted, the interface is hidden.

Administration

Interface	Description
API Connections	Full access to the *API Connections* interface: creating, editing and deleting keys. If the permission is not granted, the *API Connections* interface is hidden.

URL Shortener

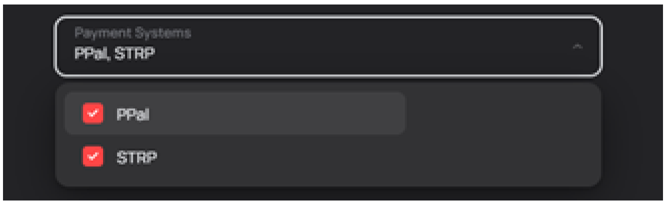
Interface	Description
Manage URL Shortener	Full access to the *URL Shortener* interface, viewing the *Short URL* column in the *Campaigns List* interface, and the availability of the *Short Link* button in the *Campaign Wizard* interface. If the permission is not granted, the *URL Shortener* interface is hidden.

13 Settings

13.1 Payment Systems

The *Payment Systems* interface is designed for adding and configuring payment gateways (systems): you can add payment systems, configure their operation, and enable/disable them. In other words, the interface serves to create a global list of employed payment systems not associated with a specific partner or its contract company.

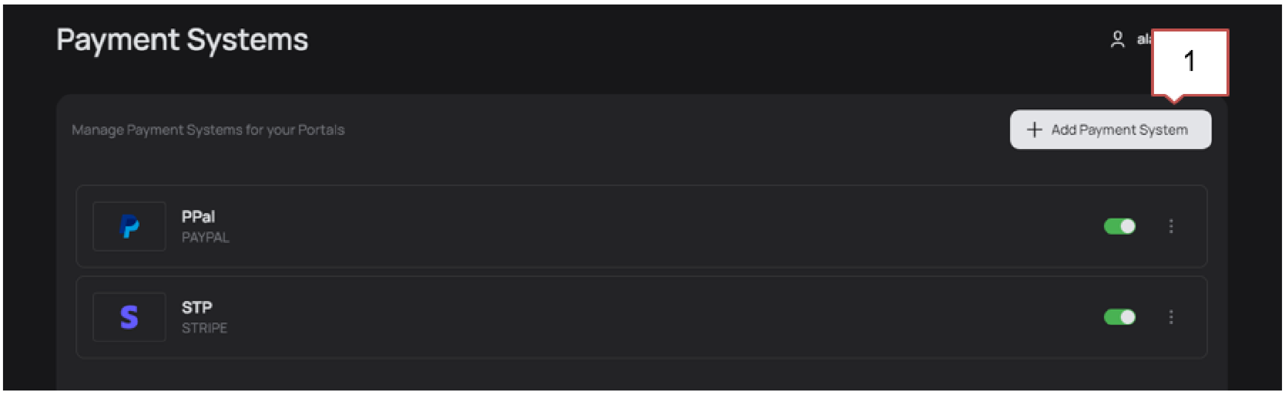
A payment system is assigned when creating/editing a contract company in the Contract companies 87 interface:



Create\Edit Contract Company

The System owner defines a list of payment systems for the downstream partner, which will be available when replenishing the balance. The Reseller can define other payment systems from the systems available to it for its downstream partners, but the Reseller can pay the upstream partner only using the ones assigned by the upstream partner.

The interface is a list of payment systems containing subscription data in alphabetical order.

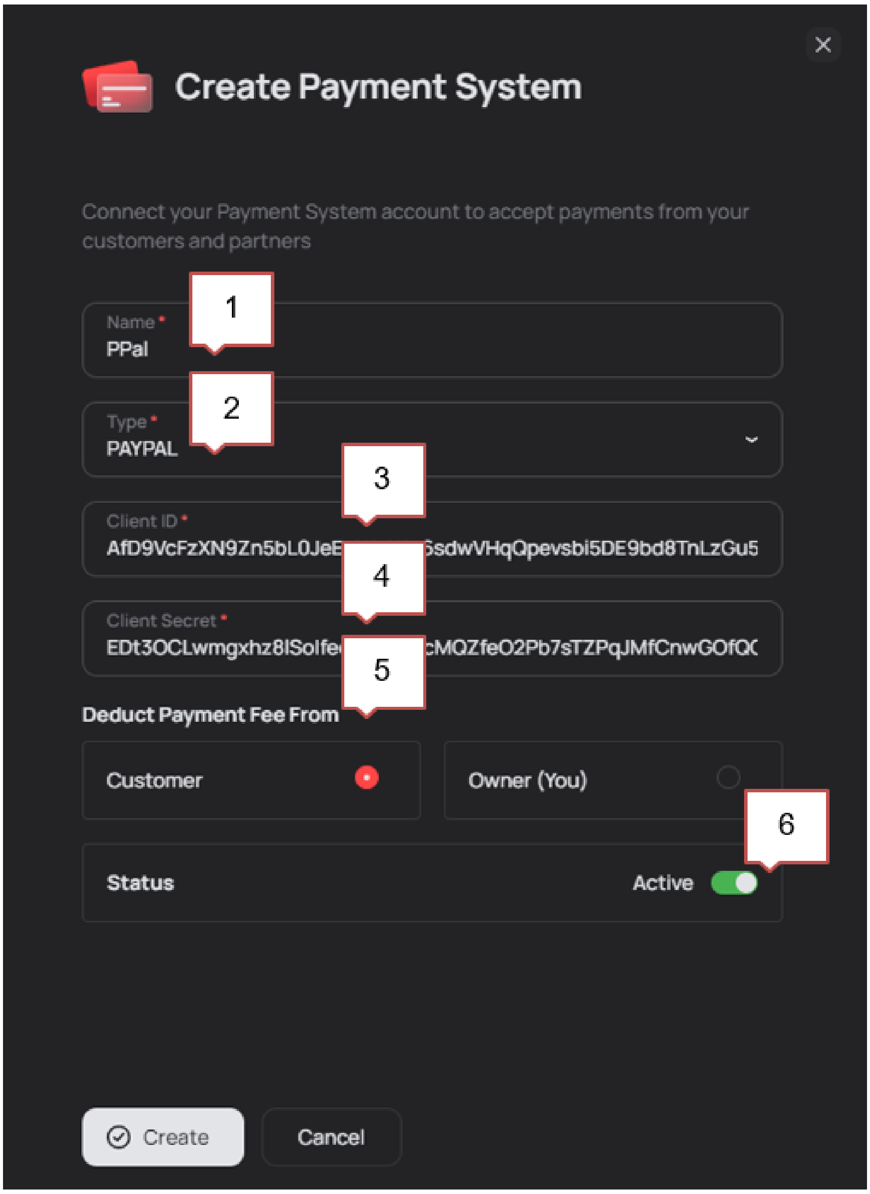


The user can:

1. Click the *Add Payment System* button located in the top right corner and add a new payment system.

2. Edit or delete existing payment systems. Click on the context menu and select the desired action.

When editing payment systems, the user can freely change all fields and settings.



Create Payment System

To add a new payment system fill in the following parameters:

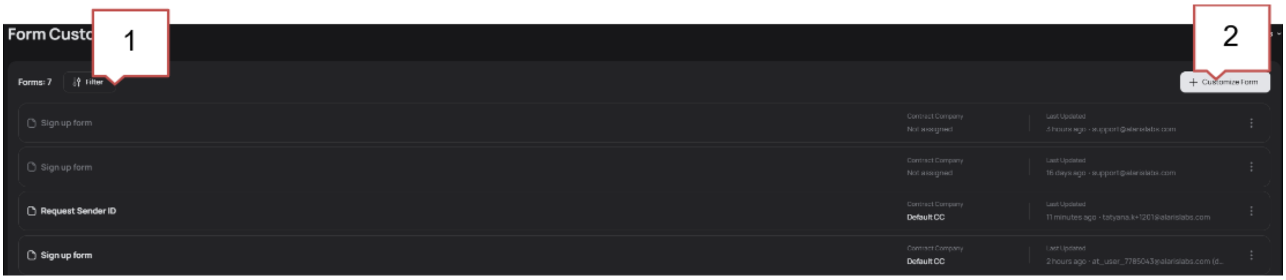
1. Specify the name of the payment system.
2. Specify the type of payment system (*PayPal* or *Stripe*).
3. Specify the client ID.
4. Specify the client's secret key.
5. Choose from whom to charge the payment commission (*Client* or *Owner* (you)).
6. Activate the payment system.

After filling in the parameters, click the *Create* button. When creating new payment systems, uniqueness is verified. No two payment systems can be created with the same name and/or the same public key/secret key. The newly created payment system will be displayed in the list. The *Cancel* button serves to cancel the action.

13.2 Form Customization

The *Form Customization* interface provides administrators with the ability to add, edit and delete custom parameters for System entities.

The interface contains a list of forms for which custom fields have been created. By default, the top of the list shows forms that have not been assigned to any contract company.



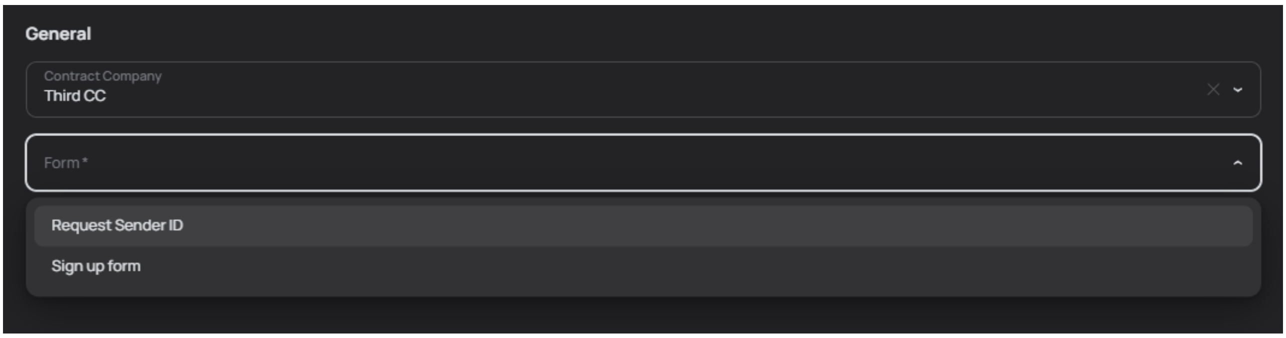
Form Customization

The user can:

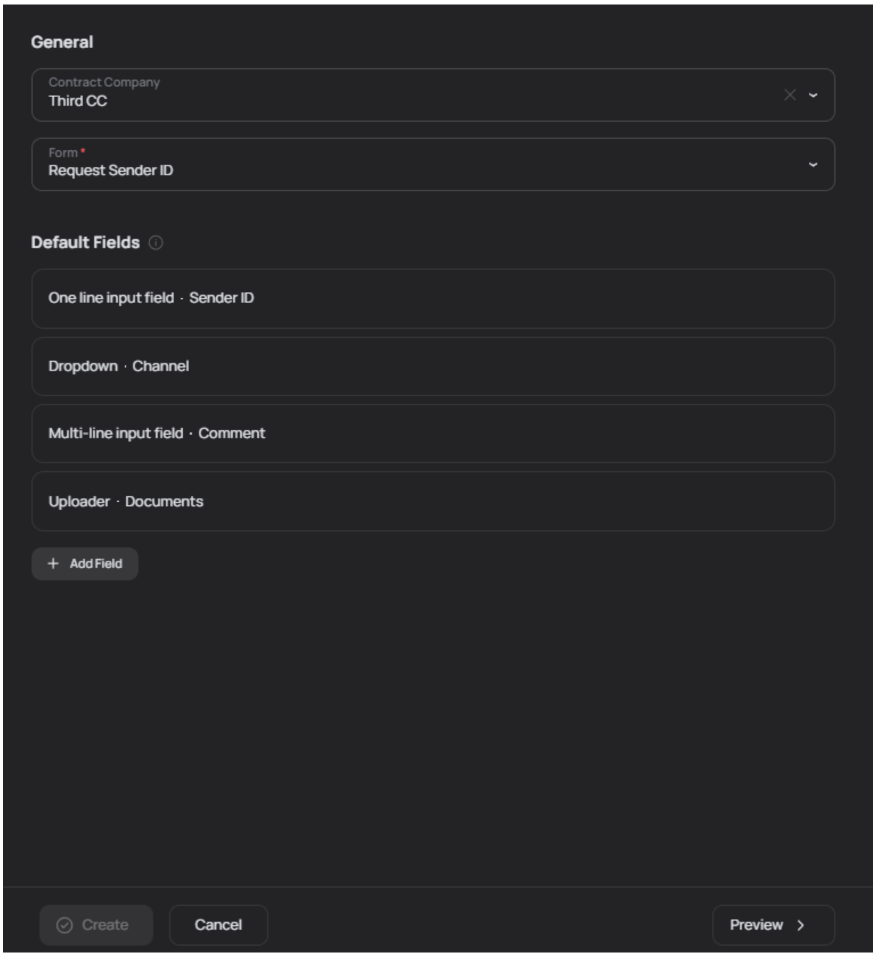
1. Use the filter to display relevant records.
2. Click the *Customize Form* button located in the top right corner and customize the form.
3. Edit or delete records. To do this, click next to the record and select the *Edit* or *Delete* as shown in the figure below:

To configure a custom form, click the *Customize form* button and fill in the following parameters:

1. Select a contract company for which the form will be customized.
2. Select the form. Two forms are available:
   - *Request Sender ID* form
   - *Sign up form*: form for self-registration of new users



After selecting a form, a block appears that contains the fields that exist in the form by default and the *Add Field* button that serves to add a new custom field.



Customize Form

Click *Add Field* to display the *Created Fields* block that serves to add a new field. Select the field type and configure the appropriate parameters. The following custom field types are available:

1. *One line input field*: a field for entering short arbitrary text.
2. *Multi-line input field*: large text input field.
3. *Number*: field for entering numeric values. Only digits are supported.
4. *Checkbox*: the field can be set to one of the two states - selected/deselected (usually serves to get the user's consent to some conditions or to select from several options).
5. *Range*: field for selecting a value in a numeric range (for example, from 0 to 10).
6. *Dropdown*: allows selecting a value from a predefined list. Typically it is used to limit the selection to predefined options.
7. *Date*: field for selecting the date in DD.MM.YYYYY format.
8. *Time*: field for specifying the time.
9. *Date & Time*: field that allows selection of both date and time. This field can combine both elements in one interface and requires the user to select them both.
10. *Date range*: field for selecting the date range (start and end of a period).
11. *Notification*: field for entering short arbitrary text - normally, informational messages or notifications shown in the form. The field is not intended for user input and will be displayed as a

text block visible to the user. The text will be static and users will not be able to enter anything into it.

12. *Section*: field for entering the section name that allows grouping multiple fields into semantic blocks.

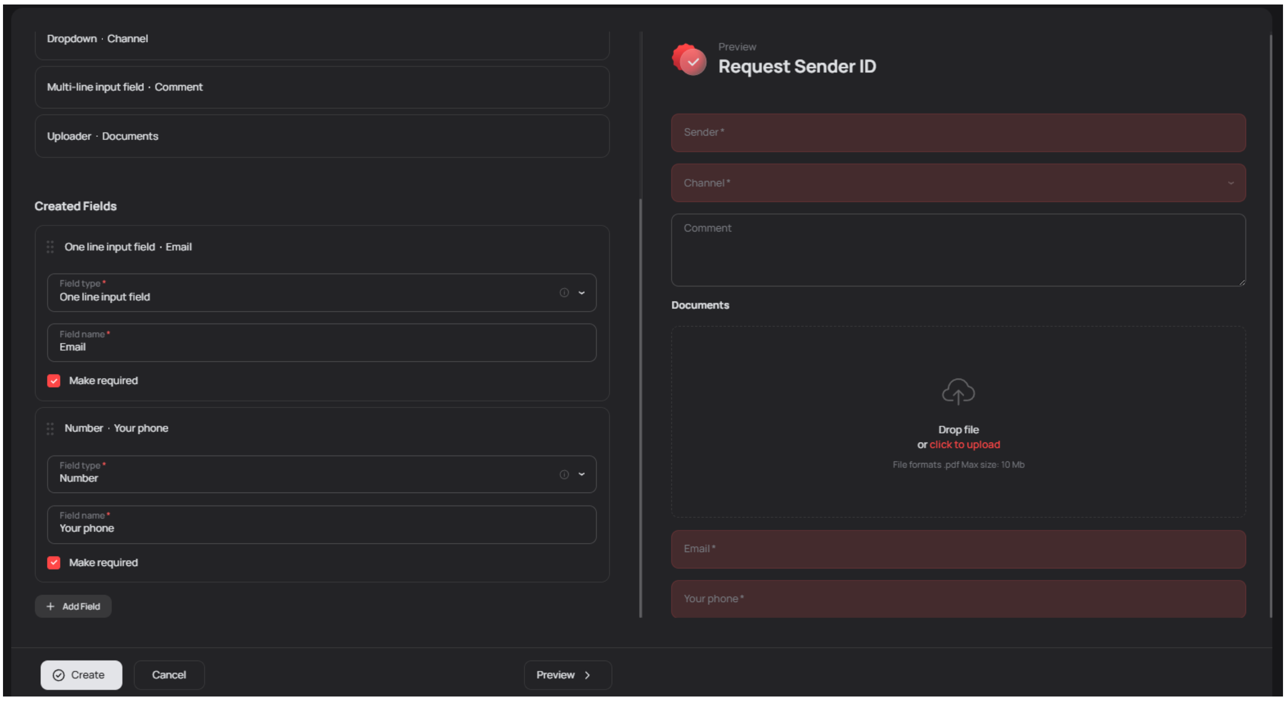
After filling in the parameters, click the *Create* button. The *Cancel* button serves to cancel the action.

Hover over a *Created Fields* block to show the following controls:

- *Copy* serves to clone the block (a block with the same parameters will appear below the original block).
- *Switch Off* serves to disable the block. In this case it will be hidden for the end user. The actions *Copy*, *Switch On* and *Delete*) are available for the disabled block.
- *Delete* serves to remove the block that was added earlier.

Create Fields block

Click *Preview* for a preview of the form with custom fields (to see how it will be displayed in the end user interface). The preview will appear on the right as illustrated below. To hide it, click *Preview* again.



Customize Form

13.3 e.212/e.164 Reference Book

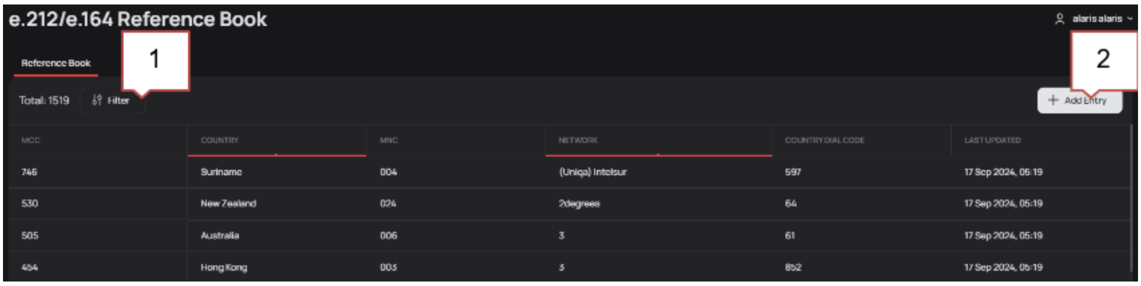
Since in SMS business rates and routing are based on MCCMNC, and SMS messages are sent to specific numbers, it is necessary to understand which network and country each number belongs to for correct tariffing and routing of messages.

When installing the Admin Panel/Campaign Portal, the System owner receives the original Reference Book, which it will update and maintain independently. The Reference Book is available only to the System owner.

The e.*212/e.164 Reference Book* interface consists of two tabs:

- Reference Book 84: a table of a table of e.212 codes (MCCMNC) matched to the country name and e.164 (number prefix) with the ability to create, edit or delete pair matches.
- HLR 86: configuration of connection with Alaris HLR Configurator.

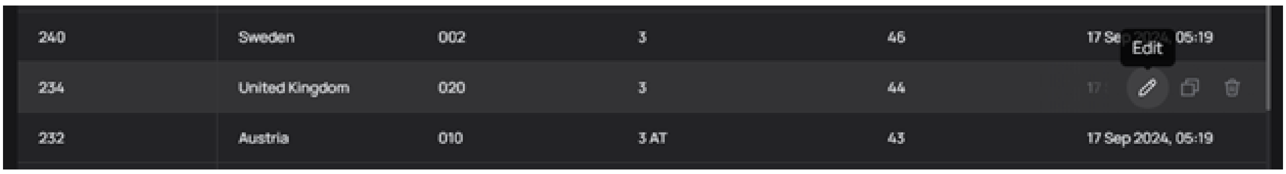
13.3.1 Reference book

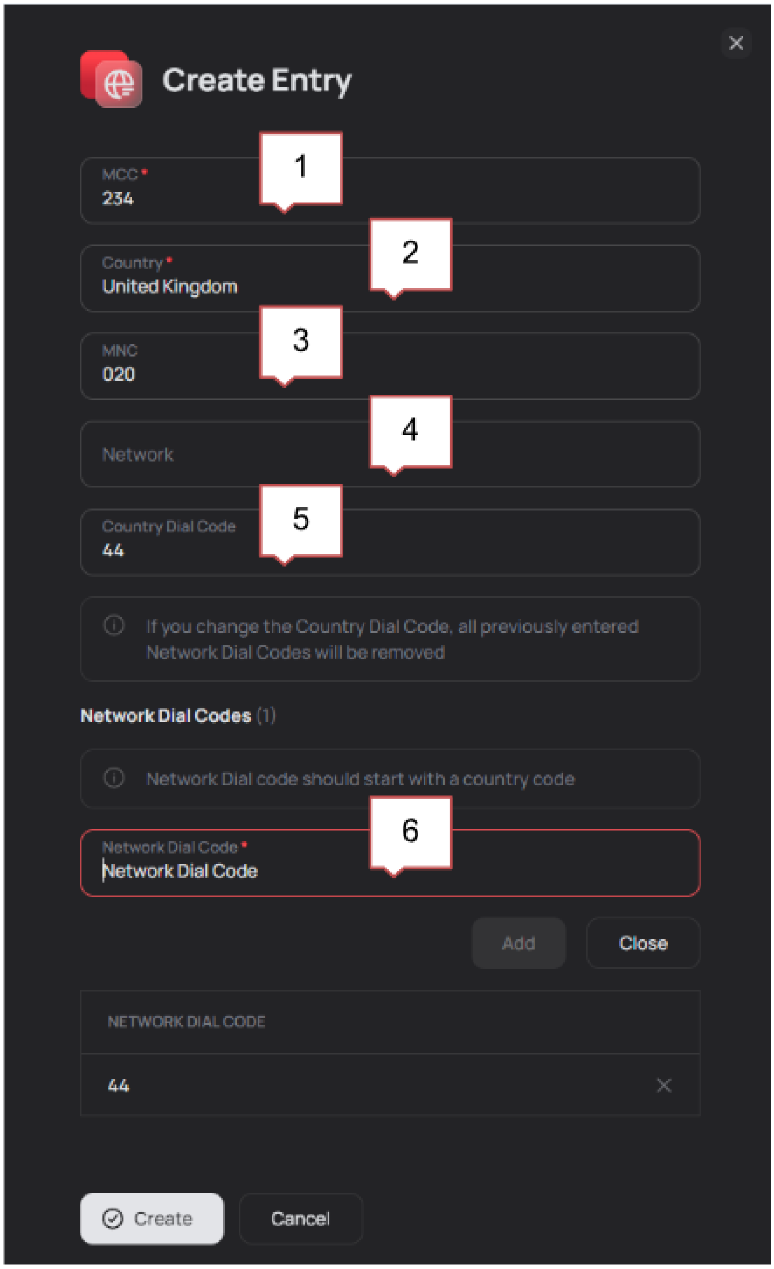


e.212/e.164 Reference Book

The user can:

1. Use the filter to display relevant entries.
2. Click the *Add Entry* button located in the top right corner and add a new entry.
3. Edit, duplicate or delete entries. To do this, hover the mouse over the entry and select the required action as illustrated below:





Create Entry

To add a new record, complete the following parameters:

1. Enter the country code (MCC).
2. Select a country from the available list or enter your own value.
3. Specify the network code (MNC).
4. Select a network from the available list or enter your own value.
5. Specify the country code.
6. After filling in the required parameters, the user can add network dial codes. They must start with the country code (that is, for country code 44 specify dial codes in the format 44XXX).

NOTE: One network code (MNC) can correspond to several different networks. You cannot add a network dial code if it is already present in another MCCMNC entry.

After filling in the parameters, click the *Create* button. The new record will be displayed in the list. The *Cancel* button serves to cancel the action.

13.3.2 HLR

HLR

In order to configure a connection between the System and Alaris HLR Configurator, specify the following data:

- *Login*: specify the user login:
  - If Alaris HLR Configurator is employed, the login is taken from the Alaris HLR Configurator interface (*Clients* tab).
  - If Alaris HLR Configurator is not employed, the login must be specified in the configuration file.
- *Password*: specify the user password. The data is taken from the same sources as the *Login* (either from Alaris HLR Configurator or the configuration file).
- *Port*: specify the port through which the System will connect to the HLR proxy. The port is required to configure a connection to the TCP API, which is used to integrate and process HLR dipping requests.
  - If Alaris HLR Configurator is employed, the default port is 29000.
  - If Alaris HLR Configurator is not employed, the port must be specified in the configuration file.
- *Host*: specify the IP address or the domain name of the HLR server. The host ensures that requests are directed to the correct server for processing dipping requests.
  - If Alaris HLR Configurator is employed, use the IP address or host name of the internal service - hlrproxy3.
  - If Alaris HLR Configurator is not employed, the host must be specified in the configuration file.

Click *Save* to save the changes.

NOTE: Currently, integration is only enabled with the Alaris HLR Configurator product. For connection to work properly, ensure that the user specified in the *login* parameter has the *hlr_smsrt_api* permission enabled in the Alaris HLR Configurator:

- If the Alaris HLR Configurator is used, the *hlr_smsrt_api* permission can be granted through the Alaris HLR Configurator interface.

- If an HLR server is used without the Alaris HLR Configurator but with a configuration file, this permission must be explicitly specified in the appropriate configuration parameters for the user.

Without this permission, requests to the HLR proxy may be rejected or ignored by the System.

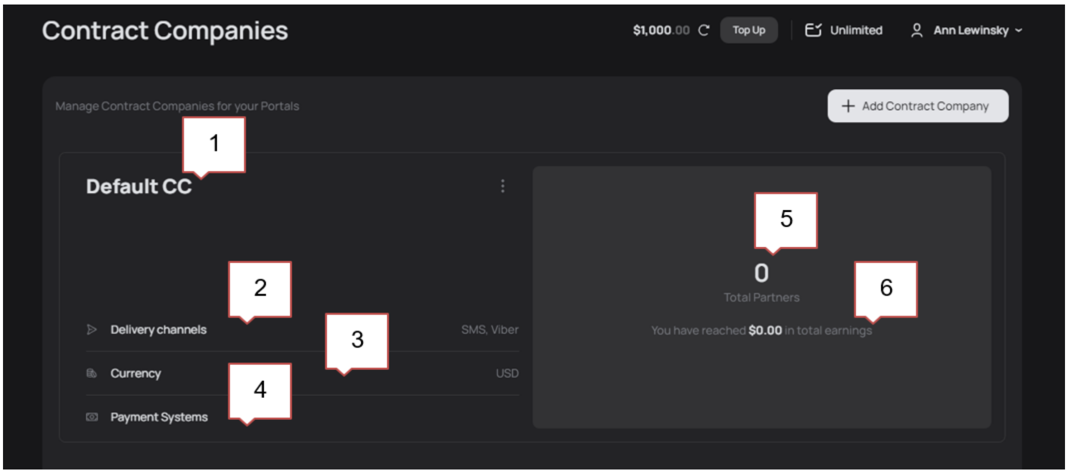
13.4 Contract Companies

The *Contract companies* interface serves to create and manage contract companies.

A contract company is a legal entity that has acquired a license to use the product and on whose behalf the user conducts business. A contract company is tied to a partner.

Campaign Portal comes with a default contract company - Default CC - created for the System owner. Later on, the System owner can change its settings and/or create more contract companies to work with their end users or downstream reseller partners. A Reseller can also create its own contract companies. A partner at a higher level cannot see contract companies belonging to a downstream partner.

The interface consists of a list of all available contract companies in the form of tiles arranged in alphabetical order.



Contract companies

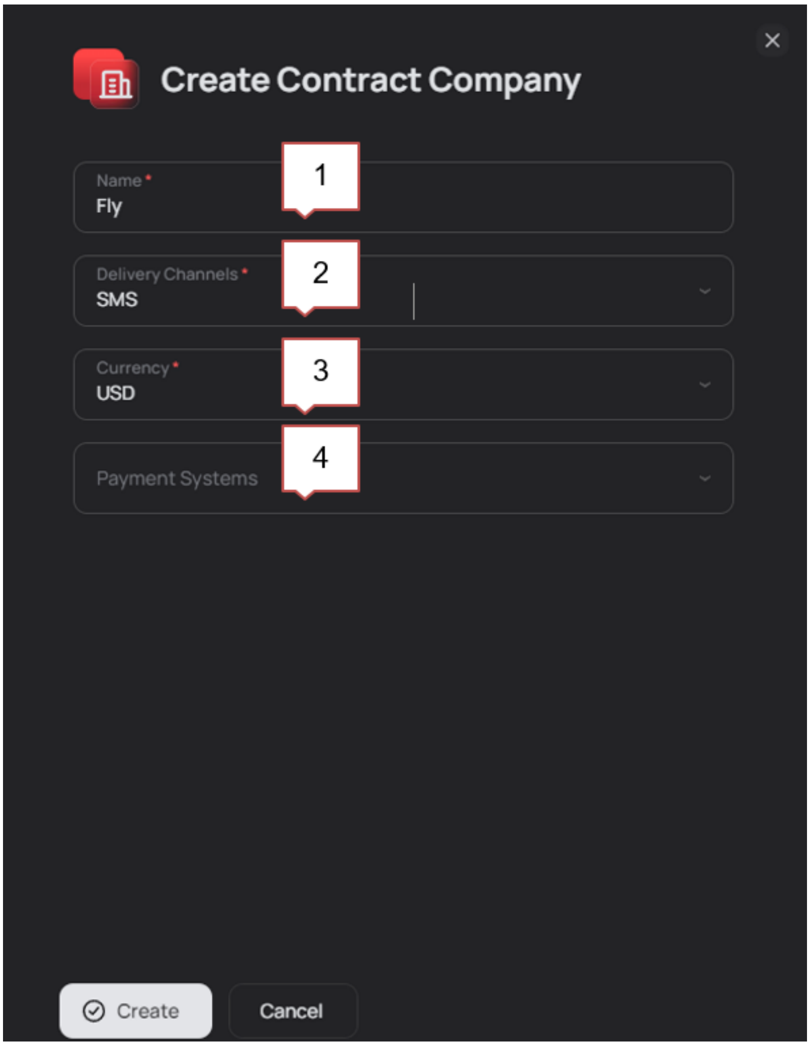
Each tile contains the following information:

1. Company name
2. Available channels
3. Currency
4. Payment systems
5. Number of partners
6. Total amount of income for the whole period

The user can:

1. Click the *Add Contract Company* button located in the top right corner and add a new record.
2. Edit or delete records. To do this, click on the context menu ⋮ and select the required action.

All parameters can be edited. It is not possible to delete a contract company bound to a partner.



Create Contract Company

When creating a new contract company, complete the following parameters:

1. Specify the name of the contract company
2. Select the delivery channel (*SMS*, *Viber*)
3. Choose the currency
4. Choose the payment system

After filling in the parameters, click the *Create* button. When creating new contract companies, uniqueness is verified. No two contract companies can be created with the same name and/or the same public key/secret key. The newly created contract companies will be displayed in the list. The *Cancel* button serves to cancel the action.