Alaris Campaign Portal

Admin Panel User's Guide

version 1.8.0

Alaris Labs
Telecom Software Products
Carrier-Neutral, Protocol-Agnostic

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1 Terms and Acronyms

Term	Definition
Admin Panel (AP)	Web application for System owners and Resellers designed for configuring and administering the System.
Alaris Campaign Portal (also referred to as ALCP or the System)	System for configuring, administering and sending out SMS or instant messaging (IM) campaigns. ALCP comprises two components: *Admin Panel (AP)* and *Campaign Portal (CP)*.
All Networks (MCC)	A rate for an MCC aggregated across all MNCs listed in the e.212/e.164 reference book.
Any Network (MCC%)	A wildcard rate covering all possible MNCs for a given MCC, including both known networks (available in the e.212/e.164 reference book) and unknown networks.
Campaign	A mass message broadcast that is sent to a list of contacts specified in it, through one of the selected delivery channels (SMS, IM). A Campaign can be cascade, scheduled or recurrent.
Campaign Portal (CP)	A web application designed to manage contacts and send messages within campaigns launched by end users.
Cascade Campaign	A mass message campaign that sends messages to a specified contact list over multiple delivery channels (SMS/IM) sequentially, in a predetermined order. If delivery over a single channel does not occur within a specified time (TTL), the System automatically switches to the next available channel. This type of campaign increases the likelihood that the recipient will receive the message. The campaign organizer can change the order of channels and the TTL. The message text can vary across different channels within the same campaign.

Term	Definition
Client	Any companies and brands that need to communicate with their audience through messaging campaigns (marketing offers, service notifications, authorization codes etc.).
Contract company	Legal entity on whose behalf the System owner or Reseller operates within the System.
Delivery Channel	Channel for message or content delivery (SMS, IM).
EDR	Detailed record of a message delivery attempt.
EDR Rerating	The process of updating the cost of already rated EDRs based on new or adjusted rates loaded or changed retroactively. For more detail on EDR Rerating refer to Statistics 97.
Endpoint	Connection endpoint through which traffic is routed to the vendor. A single vendor product can be associated with multiple endpoints, and an endpoint can be associated with a group of subscriptions.
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.
IM (Instant Messaging)	A messaging technology that allows users to send text messages, images, videos, or files through messengers (for example, WhatsApp, Viber, Telegram).
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	A prepaid package with a fixed price that includes a predetermined number of messages. It does not include rates—only the countries and networks it covers. For more information about packs, see Subscriptions 43.

Term	Definition
Partner	Entity on behalf of which a company deals with its clients. There are 3 types of partners in the System: *System owner*, *Reseller*, and *Client*.
Partner Manager	A manager responsible for attracting new clients who wish to sell messaging services, and for working with a defined list of System Owner partners using the messaging platform under their own brand. For more detail on Partner Managers, see Partners 37.
Plan	A standard postpaid rate plan with a pre-set rate, designed for sale to end users. It includes rates for various MCCMNCs, traffic types, and Sender IDs within a single channel. The number of rate plans per partner is limited by the number of available channels (one plan per channel). For more details on the plans, see Subscriptions 43.
Pre-Moderation	A process of reviewing and controlling the content of templates and campaigns to protect against unwanted content. For more detail on Pre-Moderation refer to Pre-Moderation 74.
Rate	Rate assigned to a certain vendor product or subscription. The following four rate types exist in the System: *exact MCCMNC*, *Any Network*, *All Networks* and *Rest of the World (ROW)*.
Rates for the exact MCCMNC	A rate for a specific network (exact match of MCC and MNC).
Recurring Campaign	A campaign type in which the launch recurs repeatedly to the same list of recipients at a defined interval through one or more channels.
Reseller	Intermediary companies that resell traffic delivery services, building their own networks of clients and sub-resellers.
Reseller Plan	Rate plan designed for resellers. Resellers can generate new plans based on this plan and resell them to their own Resellers or clients.

Term	Definition
	This rate plan is not visible to anyone except the Owner of this rate plan and the Reseller assigned to this rate plan. To learn more about Reseller plans refer to Subscriptions 43.
Rest of the World (ROW)	A special rate (MCC 777) used in billing as a fallback when no price is set for MCCMNC, MCC%, or MCC.
Scheduled Campaign	A campaign type in which the launch occurs once on a specified date.
Sender ID (SID)	Numeric or alphanumeric message sender identifier that allows a recipient of a message to identify the sender and frequently confirms that the sender is legitimate.
Subscriptions	Rate plan, pack, or reseller plan.
Subscriptions Group	A group comprising one or more subscriptions that can be linked to a specific endpoint for more precise traffic routing.
System owner (Administrator, SO)	Large wholesale and retail telecom operators that purchase a license to use the Alaris Campaign Portal 2.0 product for message delivery service to other companies.
Vendor	Carrier to which the System Owner sends traffic.
Vendor Product	An entity that serves as a container with rates for various destinations, traffic types, and sender ID rates.

2 About Alaris Campaign Portal

Alaris Campaign Portal (ALCP) is a web service designed for companies that wish to interact with their customers through flexibly configured communication channels (SMS/IM) within individual or bulk messaging campaigns.

The product is positioned as a convenient white-label tool, allowing companies to provide services under their own brand.

The System includes two components: the Admin Panel (AP) for System configuration and management, and the Campaign Portal (CP) for campaign delivery.

This document provides a full description of the Admin Panel component. Please refer to the document *Alaris Campaign Portal. User's Guide* for detailed information on Campaign Portal.

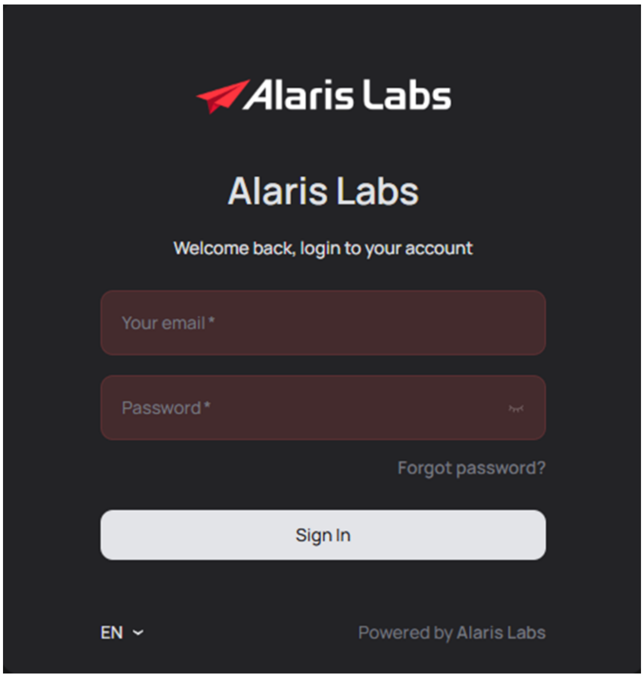
The Admin Panel is a web application for System owners and Resellers that serves for configuration and administration of Alaris Campaign Portal. It allows you to:

- Work with Partners (Partners 37 interface)
- Customize portals for contract companies (Portals 33 and Contract Companies 140 interfaces)
- Handle subscriptions and client rates (Subscriptions 43 interface)
- Set up and edit vendor products and their rates (Vendors 61 interface)
- Configure routes for IM/SMS channels for vendors (Vendors 61 interface)
- Work with Sender IDs (Sender IDs 84 interface)
- Work with campaign analytics and dashboards (Statistics 97 and Dashboard 24 interface)
- Process payments and transactions (Finance 78 interface)
- Customize payment systems (Payment Systems 120 interface)
- Configure templates and servers for email notifications (Notifications 129 interface)
- Manage user access and permissions (Users&Roles 104 interface)
- Set up custom domains for shortened URLs (URL Shortener 123 interface)
- Customize the connection between the System and MNP Configurator products to get up-to-date information about clients' mobile numbers (HLR 139)
- Customize the registration form for new users (Form Customization 126)
- Customize the Sender ID request form (Form Customization 126)
- Moderate campaigns and templates before sending (Pre-Moderation 74)
- Configure user password security requirements (Password policy 118)
- Connect to the System to check your balance, manage EDR, and import rates using application programming interfaces (API Connections interface).

3 Access to Alaris Campaign Portal

Self-registration in the Admin Panel is prohibited; all users must be added exclusively from within the System. Access is granted based on the user's role:

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



Sign In Form

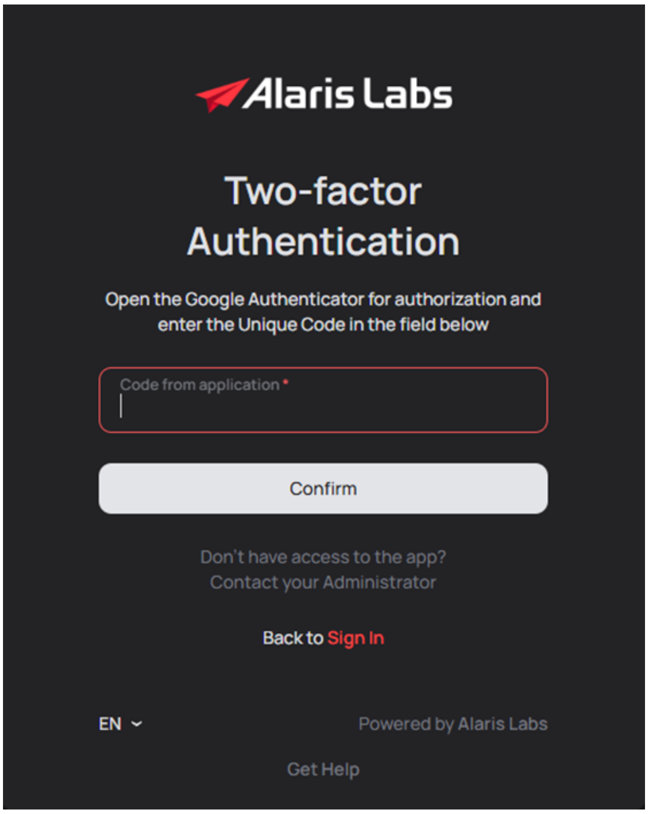
The System owner and Reseller create users in the Users & Roles 104 interface by specifying email addresses, to which the System will send a confirmation email.

The email will contain a link to activate the account. Users need to follow the link, after which a window will open where they must enter their login and password.

NOTE: If a higher-level partner has enabled the 2 Factor Authentication option when creating a portal in the Admin Panel's Portals 33 interface, a generated secret key in the form of an alphanumeric code will also be sent to the email address during registration, along with a request to add it in the Google Authenticator application.

The user needs to enter this key in the application, and the next time they enter their login and password, they must also enter the one-time password displayed in the Google Authenticator application.

Subsequently, it is possible to regenerate the secret key in the account settings (Account Settings > Security 20).



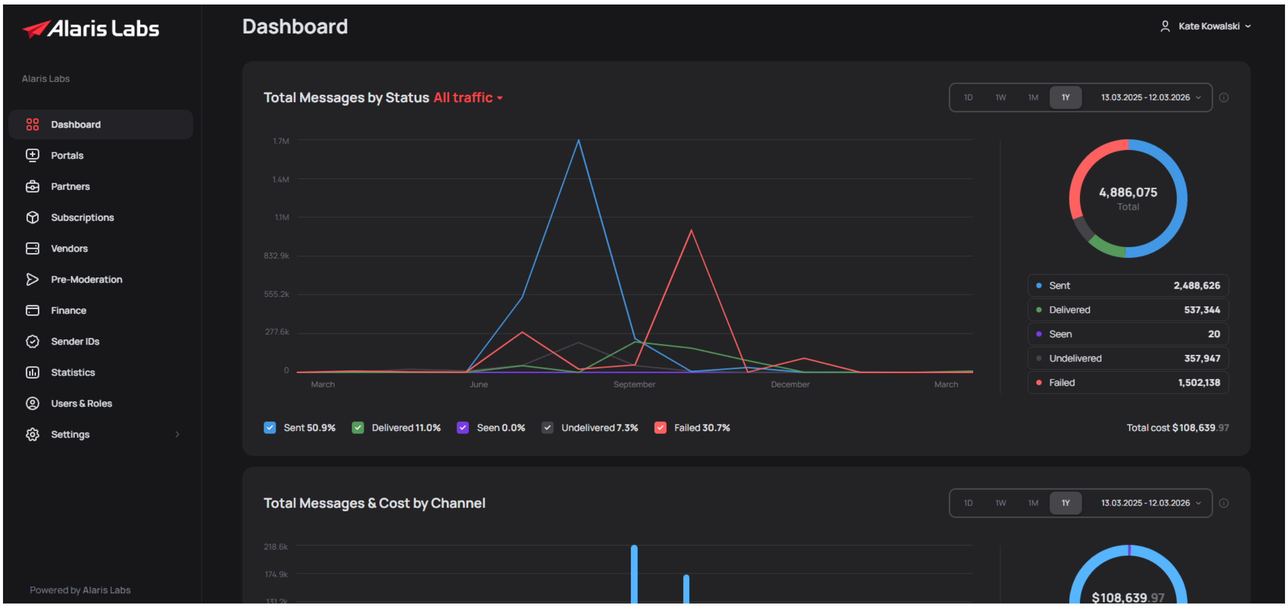
Admin Panel 2FA logon window

The System owner or Reseller can reset the secret code for a user in the Users & Roles 104 interface.

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

3.1 First login

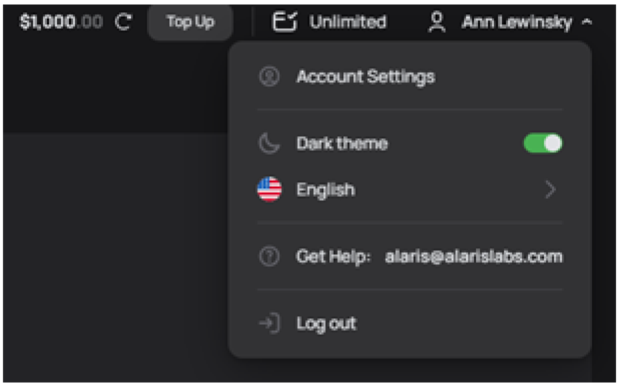
Upon logging in, you are directed to the *Admin Panel's* main Dashboard 24.



Admin Panel Main Page

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

- *Account Settings*: button that opens the Account Settings 13 interface for managing account details.
- *Terms of Service*: opens the Terms of Service. It is displayed only if the corresponding field was filled when configuring the portal.
- *Privacy policy*: opens the Privacy policy. It is displayed only if the corresponding field was filled when configuring the portal.
- *Dark theme*: toggle that adjusts the application's visual theme (Dark\Light).
- *Language*: select the preferred interface language.
- *About the App*: shows the System version.
- *Get help*: 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.


$1,000.00
Top Up
Unlimited
Ann Lewinsky
Account Settings
Dark theme
English
Get Help: alaris@alarislabs.com
Log out

User Menu

4 Quick start

4.1 System owner

To begin working with Campaign Portal or Admin Panel (resellers), your partners need you to complete the basic configuration steps in the *Admin Panel*.

Set the following parameters for full System functionality:

1. **Configure password security rules in the Password policy** 118 **interface:**
   - This is a crucial setting for ensuring overall System security that affects all operations related to password input, validation, and generation for every System user, including Campaign Portal users.
   - The System owner manages password requirements such as minimum length, number of digits, letters and special characters, reuse restrictions, password expiration, etc.
2. **Configure payment systems in the Payment Systems** 120 **interface:**
   - Add and configure payment gateways, forming a full list of available payment systems without linking to specific partners.
   - Later these payment systems will be assigned to contract companies during creation/editing to ensure correct financial operations in the System, including balance top-up.
3. **Configure a contract company in the Contract Companies** 140 **interface:**
   - All portals are linked to legal entities (contract companies). The default contract company — *Default CC* — is automatically created for the System owner. You can edit it.
   - You can create your own contract companies for working with your lower-level partners. At this step, you can configure the key settings of the contract companies: company name, delivery channels, currency, and payment systems.

After contract companies are configured, you can proceed to creating and customizing portals and creating partners.

4. **Create and customize portals in the Portals** 33 **interface:**
   - In this interface you create and customize Campaign Portal or Admin Panel instances.
   - Configure the key access parameters, portal appearance, and core user settings: domain, logo, contact details, two-factor authentication, registration conditions, and initial parameters for new clients.
5. **Configure partners in the Partners** 37 **interface:**
   - Create and configure partners - resellers and end users.
   - Assign managers for the partners if necessary. Managers are System users that have access to the data of these partners.
   - Additional options for Campaign Portal partners are available that define the specifics of their work (for example, MO message processing, HLR requests, etc.). The full list is provided in the Partners 37 section.

Before creating System users, you need to ensure that email notifications are working.

6. **Configure mail servers for notifications in the Notifications** 129 **interface:**

  - In this interface you manage the servers through which email notifications are sent to System users.
  - If you do not add a server, emails will not be sent to your colleagues or your lower-level partners.

7. **Configure notification templates in the Notifications 129 interface:**
  - Upon System installation, a set of preconfigured default Alaris templates is provided. These templates are used as a baseline until you create your own custom versions.

After email notifications are configured, you can create System users.

8. **Configure users in the Users&Roles 104 interface:**
  - In this interface you create user accounts for your colleagues and users of your lower-level partners, assign roles, configure access rights, and define the notifications the user will receive.

The next step is to configure client subscriptions, vendor products, and message routing.

9. **Configure subscriptions for your partners in the Subscriptions 43 interface:**
  - Create and manage client subscriptions such as Message Pack (prepaid message package) and Rate Plan, which will be available to end users for viewing and purchasing in the *Campaign Portal* > *Purchase* web interface.
  - For reseller partners, a *Reseller Plan* is available, which will be displayed in their Vendors 61 interface.
  - Promo packs can be configured and auto-assigned to new Campaign Portal users on self-registration (if the pack was selected in portal settings).
  - For each subscription you can specify either a list of countries/networks covered or upload the rates.
  - Subscriptions can be grouped for routing through vendor endpoints.

10. **Configure routing in the Vendors 61 interface:**
  - Create and manage vendor products and connection endpoints through which messages will be routed directly to the selected service provider (vendor).
  - When creating a vendor product, specify its name, delivery channel (SMS/IM), currency, and billing mode. Then upload the rates to this product, which will be used to calculate message costs.
  - When creating a connection endpoint, specify its parameters, priority, status, as well as the vendor product and the list of countries/networks for which it will be used. If necessary, routes can be segmented by subscription groups.

11. **Manage Sender IDs in the Sender IDs 84 interface:**
  - Process registration requests for new Sender IDs from lower-level partners.
  - Create Sender IDs and subscriptions for them.
  - Monitor Sender ID usage.
  - Enable/disable Sender IDs and subscriptions for them.

Performing these initial settings provides the basic functionality of the System necessary for stable operation of key components and compliance with security requirements.

Enhancing Campaign Portal Functionality

You can also enhance the System functionality with these tools:

- **Customize user registration and Sender ID request forms in the Form Customization** 126 **interface**:
  - You can add custom fields for System entities, which allows adding extra fields in Campaign Portal's registration and Sender ID request forms.
- **Create short domains for the URL shortener in the URL Shortener** 123 **interface:**
  - In this interface you can create short domains that Campaign Portal users can utilize for generating shortened links when launching campaigns.
  - Shortened links help reduce message length, segment count, and overall campaign cost.
- **Upload rates using the API by configuring access tokens in the API Connections** 142 **interface:**
  - Rates can be uploaded to both vendor products and client subscriptions.
  - You can upload new rates, update existing ones, or close current rates.

4.2 Reseller

Reselling is a multi-level model in which a partner company (reseller) resells traffic delivery services to other companies. Resellers act as intermediaries between the System owner and end users and can build their own network of subordinate resellers.

In order for a reseller to begin working, the System owner or a higher-level reseller must complete the basic partner setup in the System:

1. Create a Contract Company in the Contract Companies 140 interface.
2. Create a Portal for the Contract Company in the Portals 33 interface.
3. Create a partner with the Reseller attribute for the Contract Company in the Partners 37 interface.
4. Create a user for this Reseller partner in the Users & Roles 104 interface.
5. Configure a subscription of the Reselling Plan type for this partner in the Subscriptions 43 interface.
   a. This plan will be displayed for the Reseller in the Vendors > Products 61 interface.
   b. Based on this plan, the Reseller can do the following in the Subscriptions 43 interface: create their own subscriptions, generate rate plans, and upload price lists for its clients.
6. Configure routing in the Vendors > Endpoints 63 interface.

Once setup is complete, the Reseller receives a link to the portal and login credentials. Once logged in, the Reseller can create their own partner network:

1. Create contract companies, portals, partners, and users (including both Resellers and end users).
2. Create short domains, set up payment systems, and configure custom fields.
3. Set up email notifications for your contract companies.

4. Decide on the approval of applications for the registration of Sender IDs, campaign templates, and the campaigns themselves.

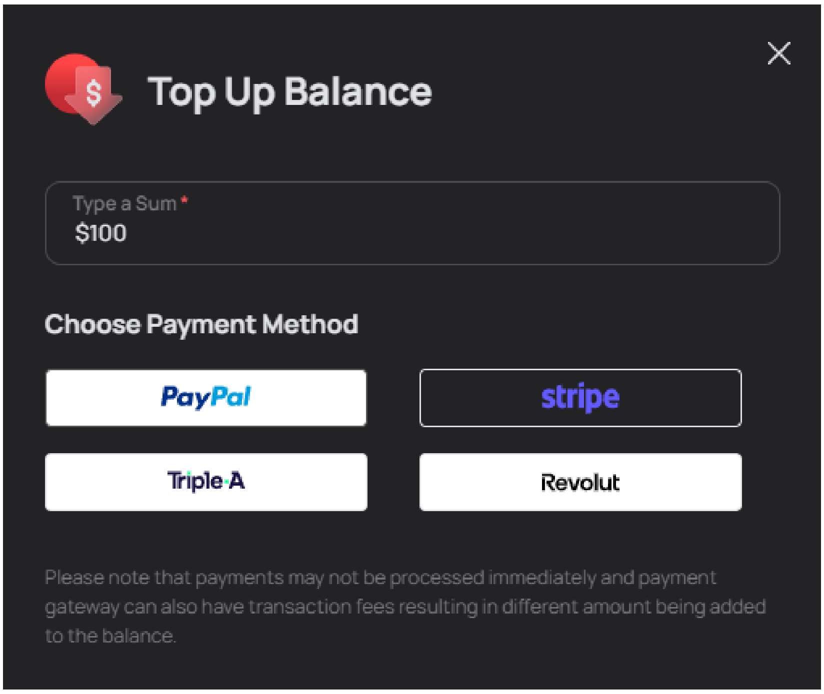
Resellers can only operate through the Admin Panel and cannot send campaigns directly. To send campaigns on their own, they must create their own client partners, set up the Campaign Portal for them, and create users for sending campaigns.

Resellers also do not have access to password settings, the country and network reference book, or routing settings—all of these are managed by the System owner.

5 Top Up Balance

For Resellers, the balance and the *Top Up* button are displayed in the upper right corner. Clicking the button opens a window for topping up the balance.

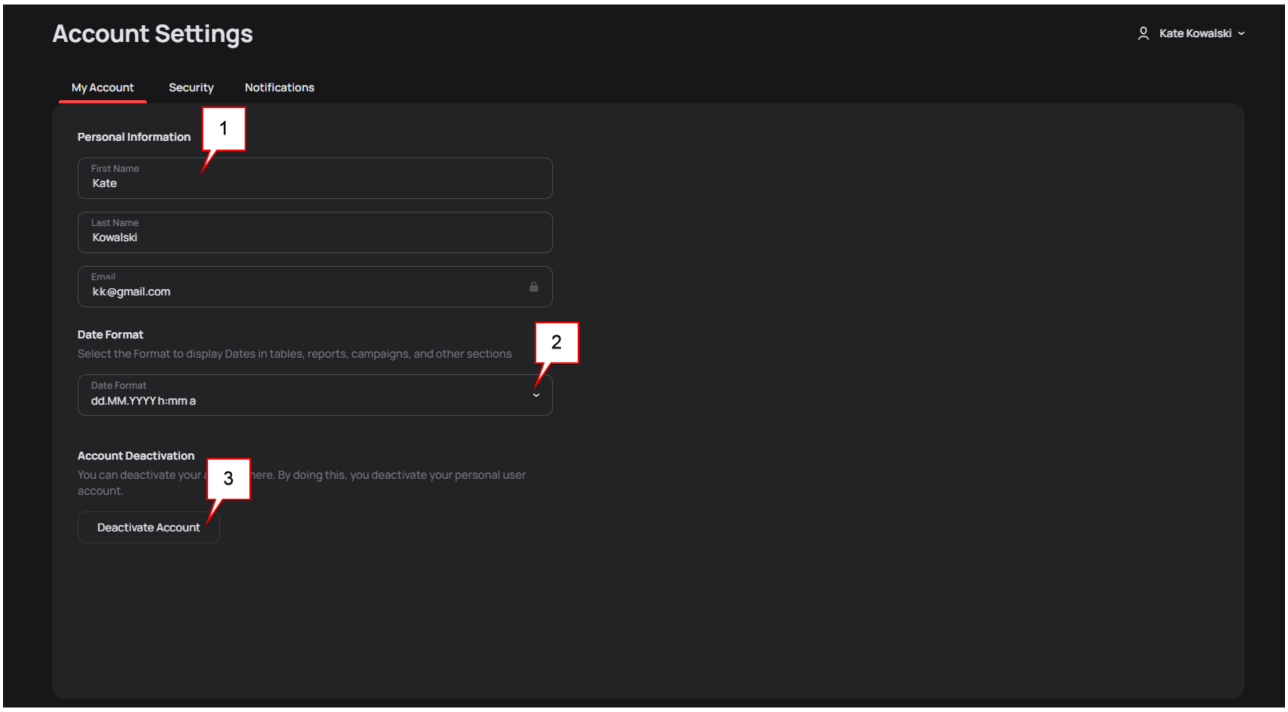
Enter the amount and select a payment system, after which a new page of the selected payment System will open to complete the payment.



Top Up

6 Account Settings

6.1 My Account



Account Setting > My Account

In the *Account Settings > My Account interface* you can:

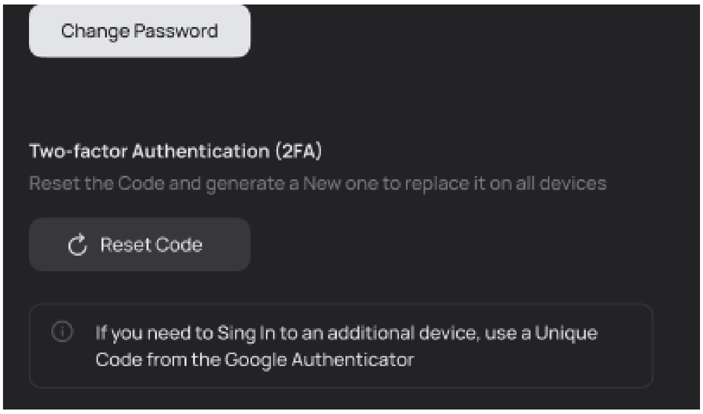
- Change your first and last name.
- Specify the date format that will be applied to all dates in the System.
- Deactivate your account by clicking the *Deactivate Account* button.
    - After deactivation, you will not be able to log in to your account on the portal.
    - To unlock the account, you will need to contact your higher-level partner.

6.2 Security

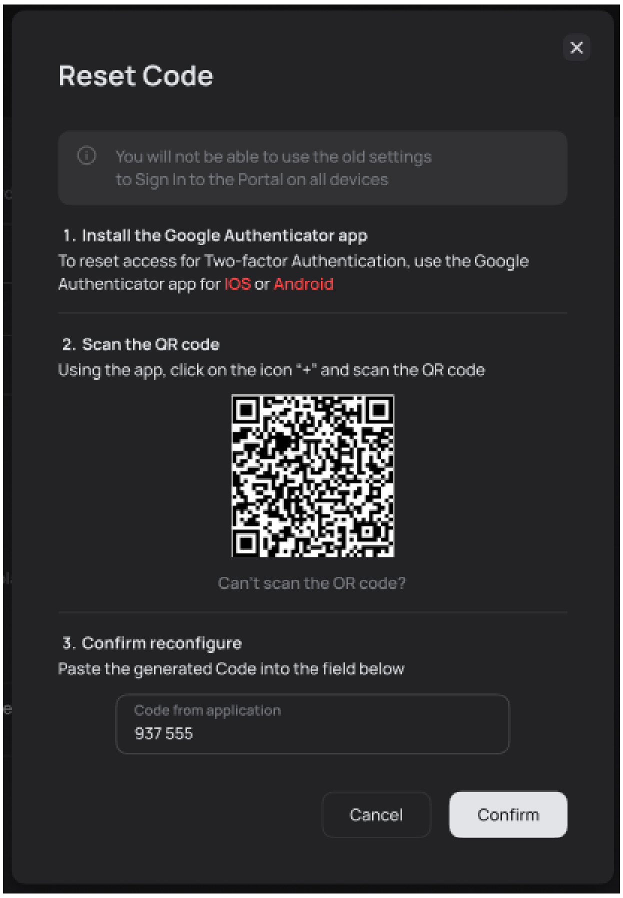
Account Setting > Security

You can change your account password by entering your current password and a new one.

If 2FA has been enabled on the portal, you can generate a new code for configuring *Google Authenticator* by clicking the *Reset Code* button.

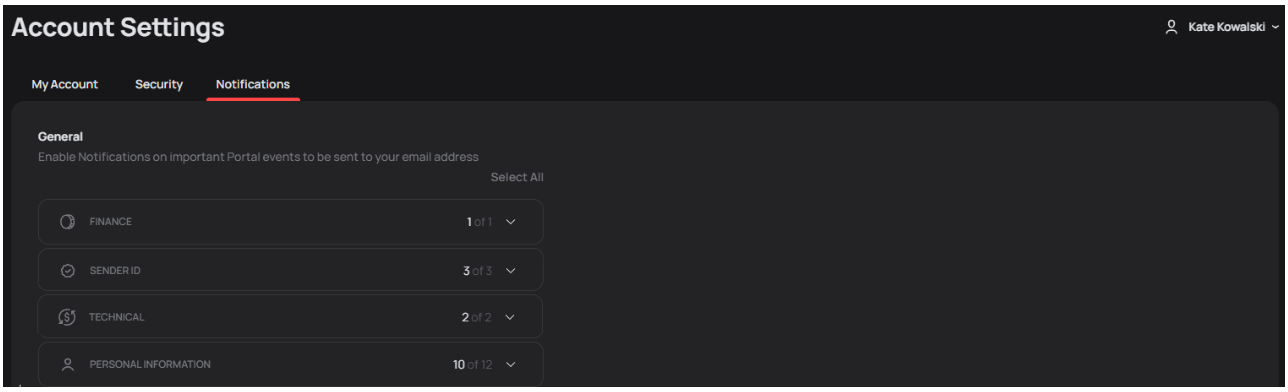


Account Setting > Security > 2FA (1)



Account Setting > Security > 2FA (2)

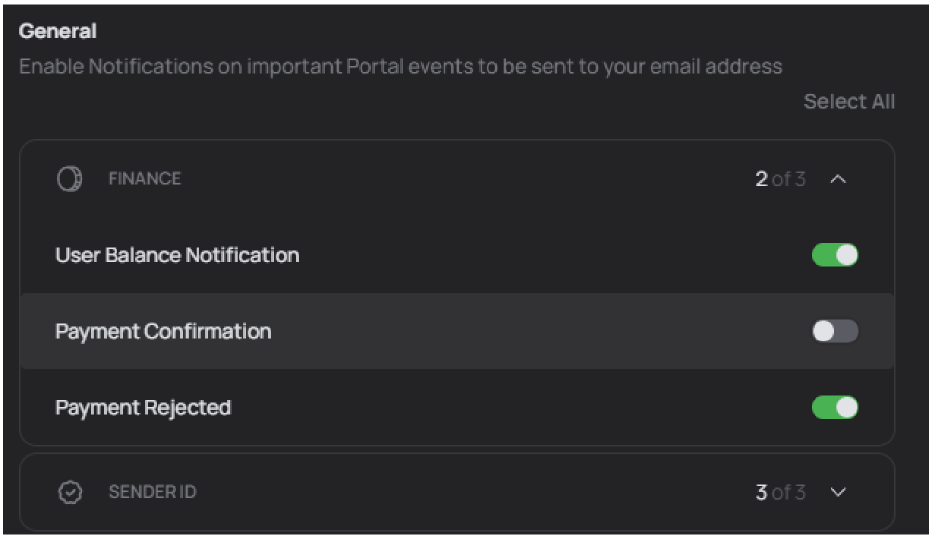
6.3 Notifications



Account Setting > Notifications (1)

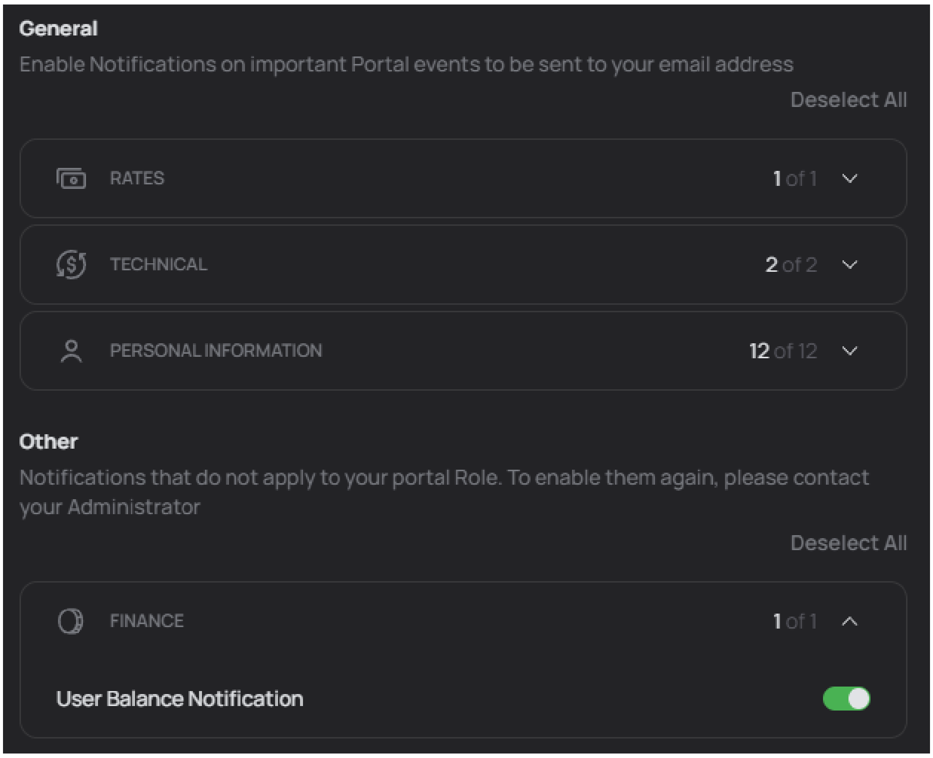
You can manage the email notifications for your account.

If you do not want to receive a certain category of emails, uncheck the corresponding checkbox. Settings are saved automatically.



Account Setting > Notifications (2)

If your higher-level partner has enabled notifications for you outside your main role, you will see them in the *Other* section:

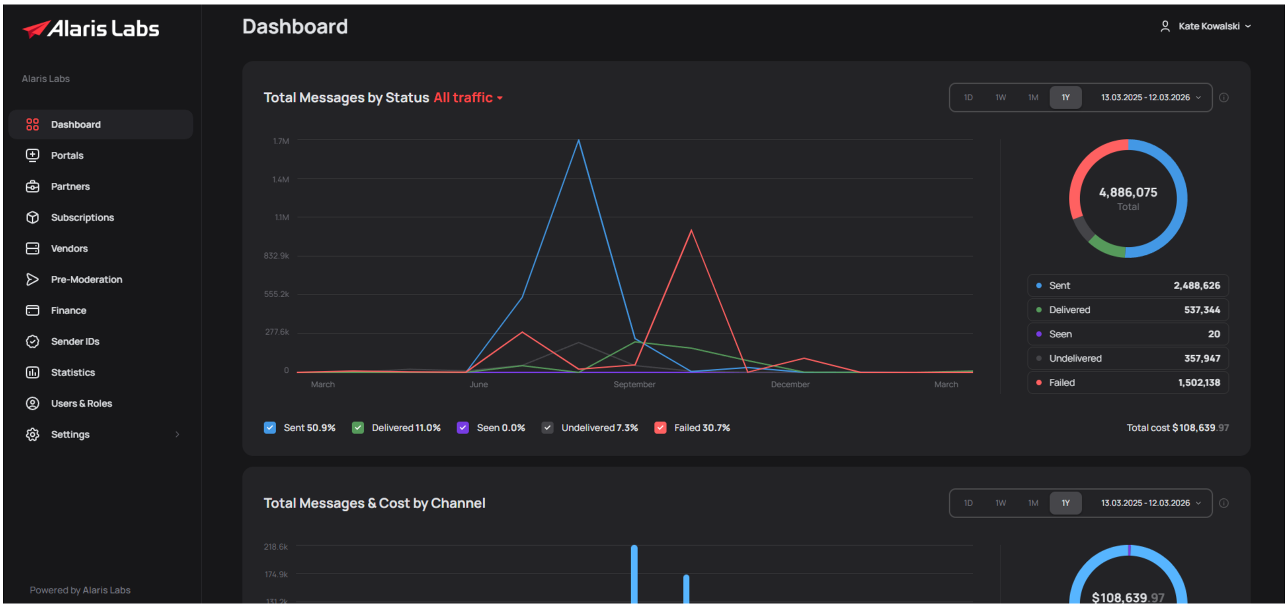


Account Setting > Notifications (3)

You can disable them, but re-enabling such notifications can only be done by a higher-level partner or a user with permission to edit other users.

7 Dashboard

Dashboard is the interface you see when you log in to the portal. It is designed to display an analytical summary of the cost and volume of sent messages in the form of charts, with the ability to select the data display period.



Dashboard

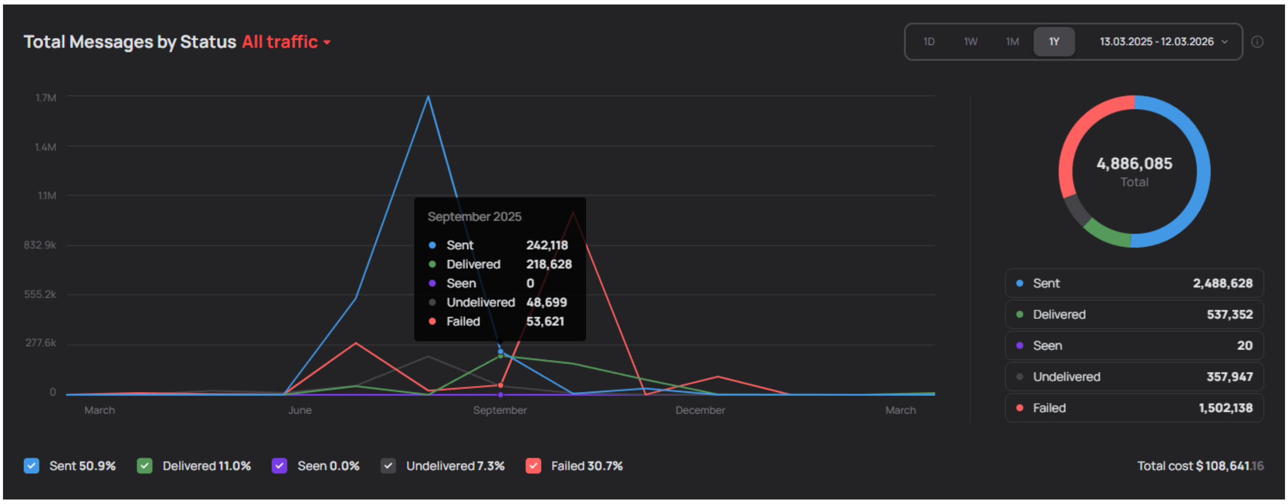
7.1 Charts

Total Messages by Status — a chart displaying the number of sent messages broken down and filtered by status:

- Each status is highlighted in its own color for easy visual perception:
  - *Sent*: light blue
  - *Delivered*: green
  - *Seen*: blue
  - *Undelivered*: grey
  - *Failed*: red
- It supports filtering by channel type:
  - *All traffic*: default
  - *SMS*
  - *Viber*
  - *WhatsApp*
- It allows enabling/disabling the display of each status:
  - Selecting/deselecting a checkbox adds or removes the corresponding status from the chart.

- Each checkbox displays the status name and its percentage of the total number of messages.

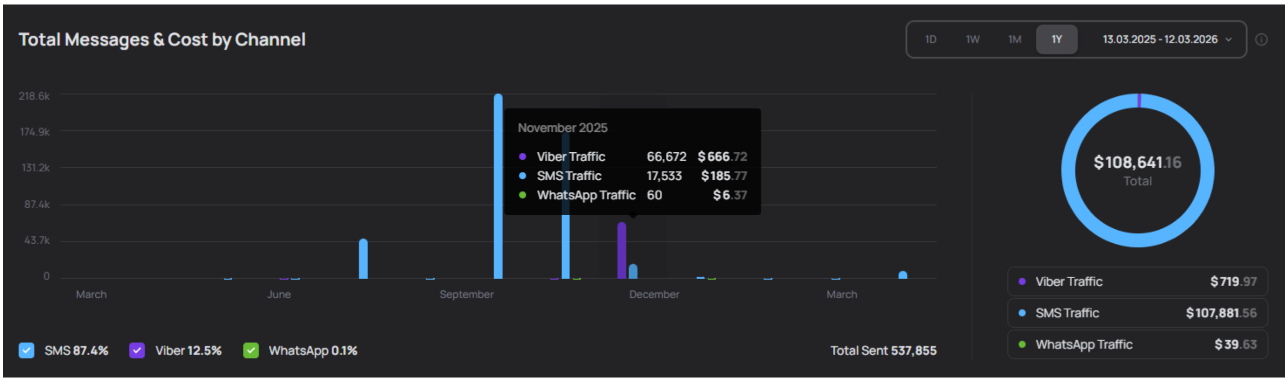
- Hovering over the chart displays the date, status, and number of messages.
- On the right, message distribution by status is shown as a pie chart, where *Total cost* displays the total cost of all sent messages.



Dashboard > Total Messages by Status

Total Messages & Cost by Channel — a chart displaying the number and cost of sent messages by delivery channel.

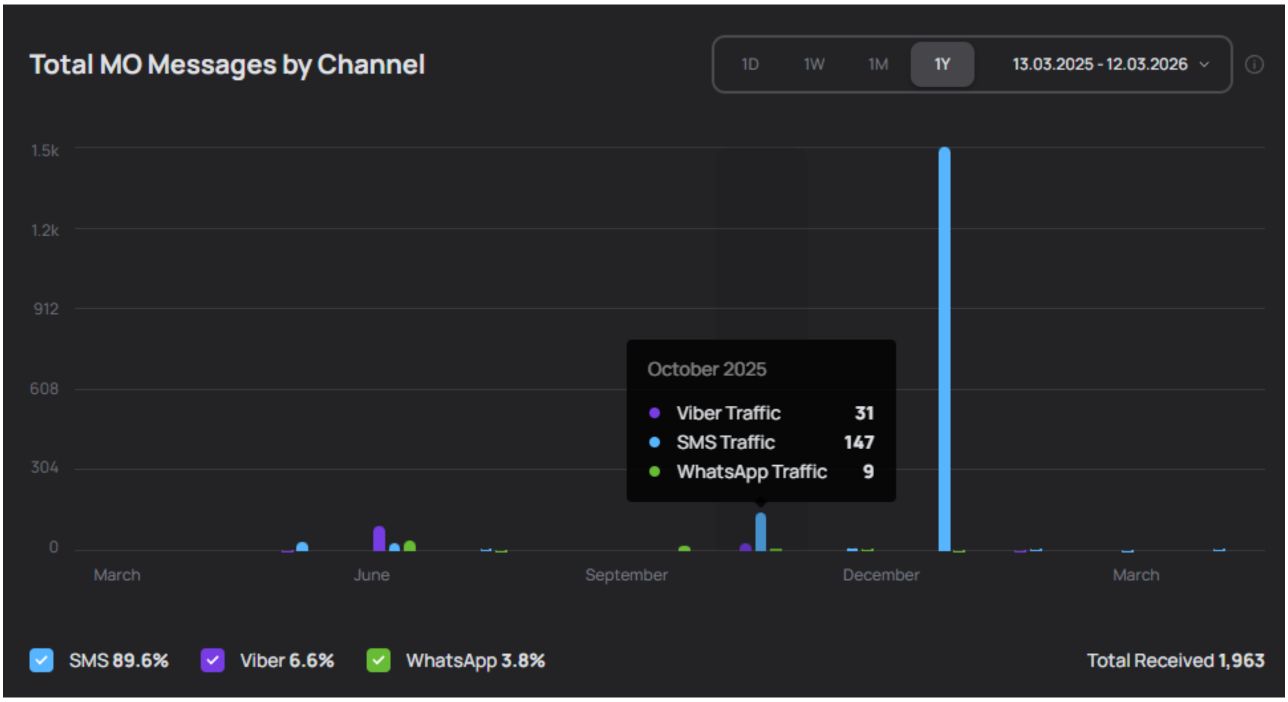
- Each channel is highlighted in its own color for easy visual perception:
  - *SMS*: light blue
  - *Viber*: blue
  - *WhatsApp*: green
- It allows enabling/disabling the display of each channel:
  - Selecting/deselecting a checkbox adds or removes the corresponding channel from the chart.
  - Each checkbox displays the channel name and its percentage of the total number of messages.
- *Total Sent* displays the total number of sent messages.
- Hovering over the chart displays the date, channel, number of messages, and their cost.
- On the right, message cost by channel is shown as a pie chart, where *Total* displays the total cost of all sent messages. Hovering over a chart segment displays the channel and the cost of messages sent through it.



Dashboard > Total Messages & Cost by Channel

Total MO Messages by Channel — a chart displaying the number of incoming MO messages broken down by delivery channel (SMS/IM).

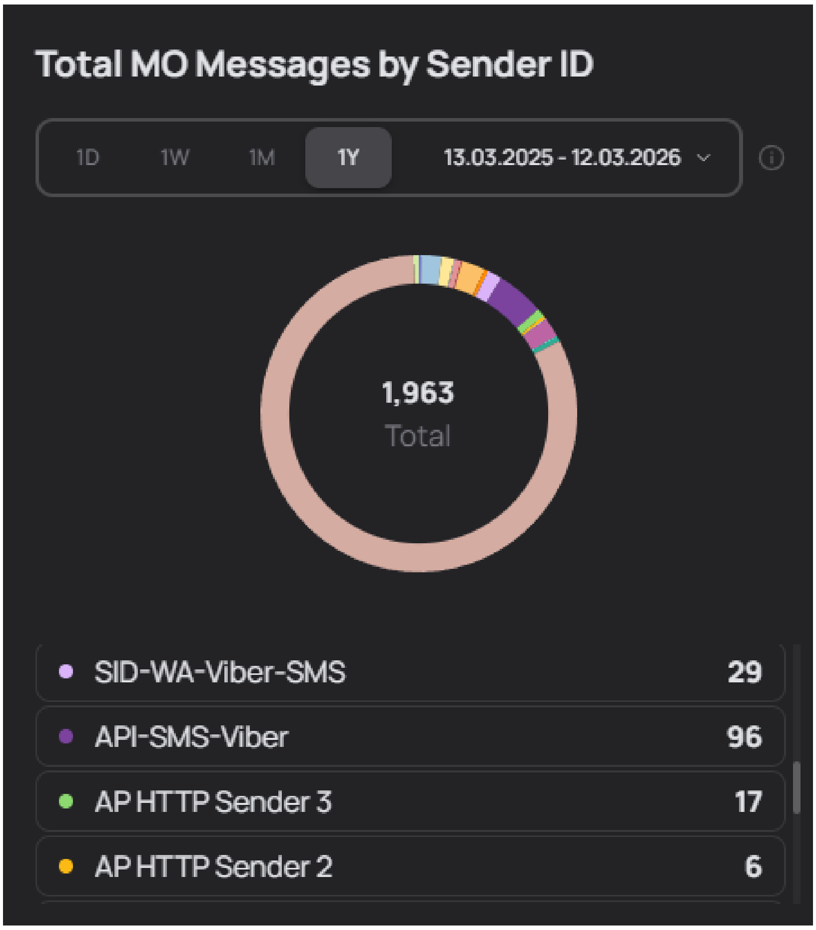
- Each channel is highlighted in its own color for easy visual perception:
  - *SMS*: light blue
  - *Viber*: blue
  - *WhatsApp*: green.
- It allows enabling/disabling the display of each channel:
  - Selecting/deselecting a checkbox adds or removes the corresponding channel from the chart.
  - Each checkbox displays the channel name and its percentage of the total number of messages.
- Hovering over the chart displays the date, channel, and number of messages.
- *Total Received* displays the total number of received messages.



Dashboard > Total MO Messages by Channel

Total MO Messages by Sender ID — a chart displaying the number of incoming MO messages broken down by Sender ID.

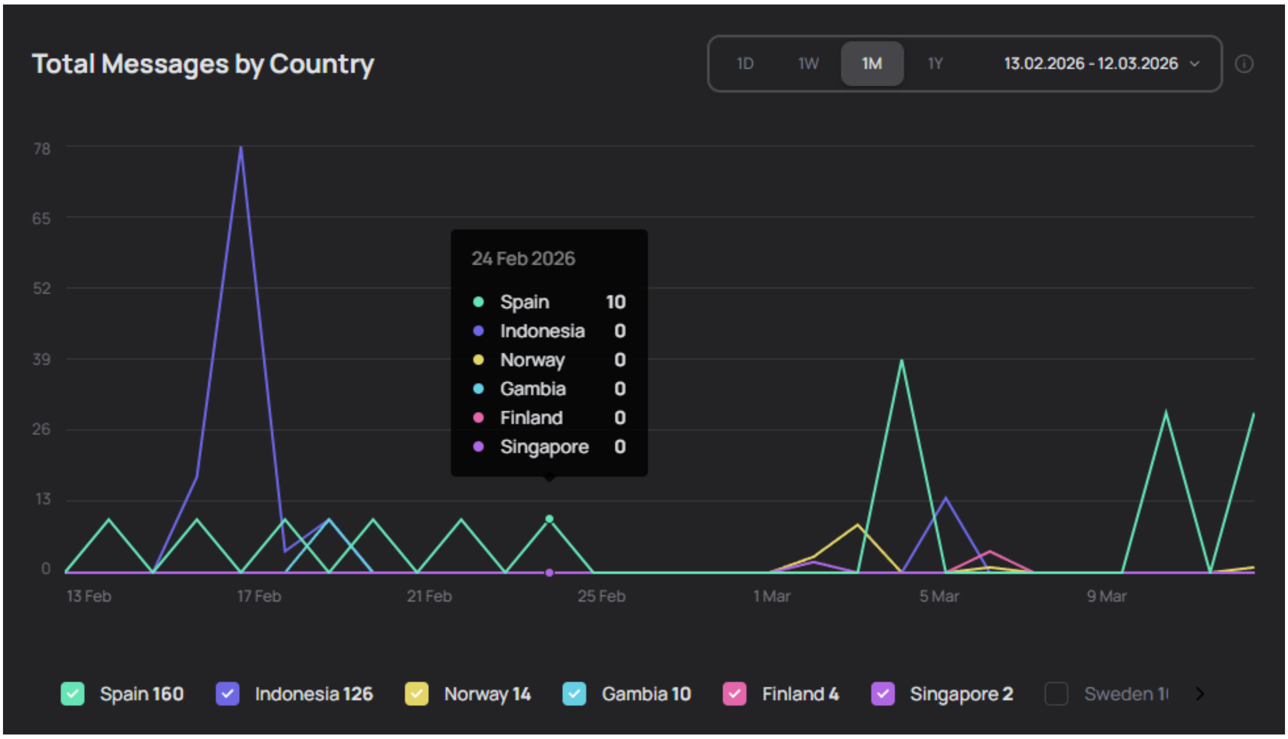
- Hovering over a chart segment displays the Sender ID and the number of received messages for it.
- *Total* displays the total number of all received messages.



Dashboard > Total MO Messages by Sender ID

Total Messages by Country — a chart displaying the total number of sent messages by country, with the ability to select a period.

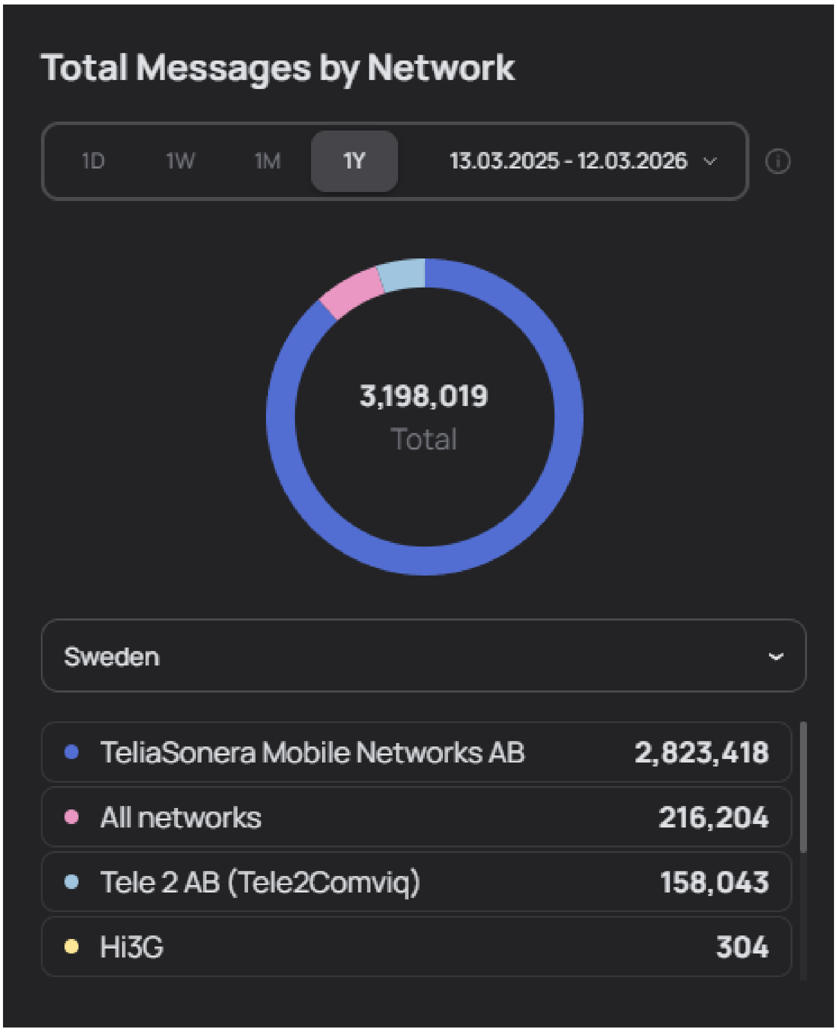
- Countries are displayed in different colors for easy perception and comparison of indicators between selected values.
- It allows enabling/disabling the display of each country:
  - Selecting/deselecting a checkbox adds or removes the corresponding country from the chart.
  - Each checkbox displays the country name and the number of messages for it.
- Hovering over the chart displays the date, country, and number of messages.



Dashboard > Total Messages by Country

Total Messages by Network — a chart displaying the number of sent messages by network, filtered by country.

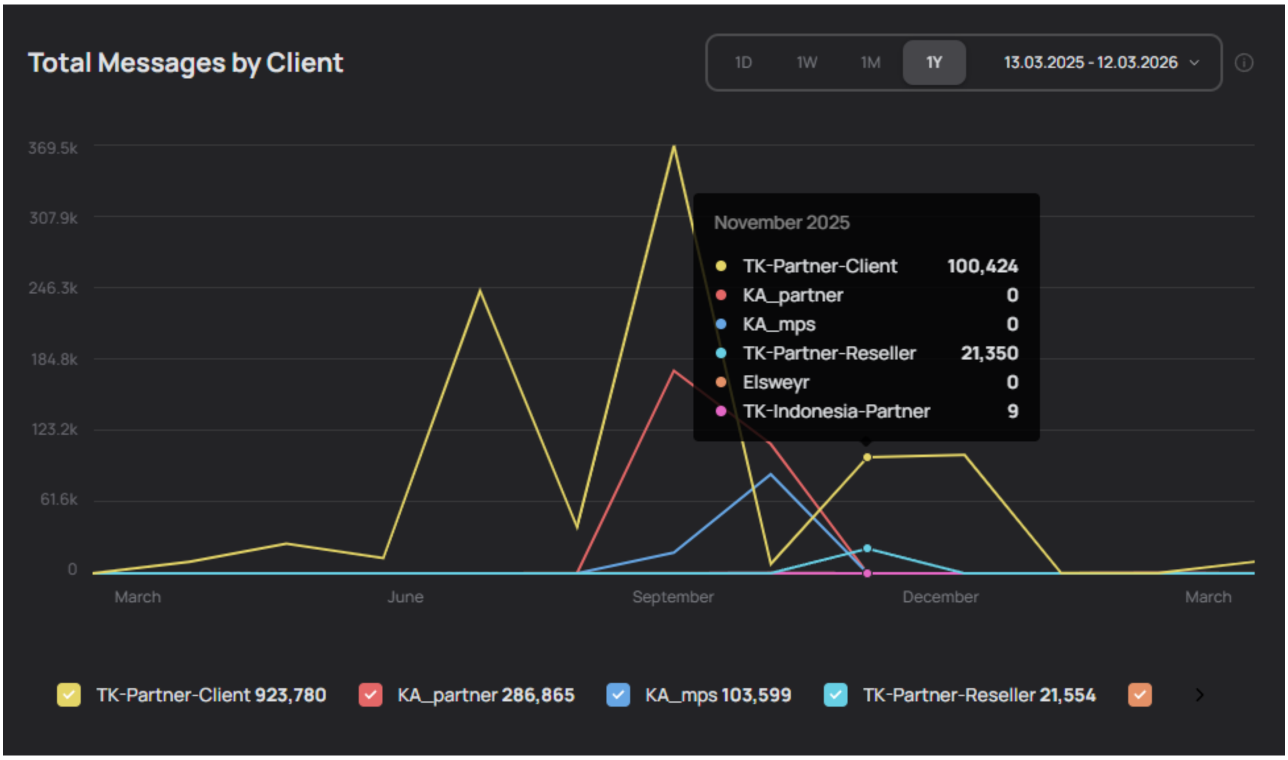
- It allows selecting one country for which the chart will be built.
- Hovering over a chart segment displays the network name and the number of sent messages for it.
- *Total* displays the total number of all sent messages across the networks of the selected country.



Dashboard > Total Messages by Network

Total Messages by Client — a chart displaying the total number of messages by partner, with the ability to select a period.

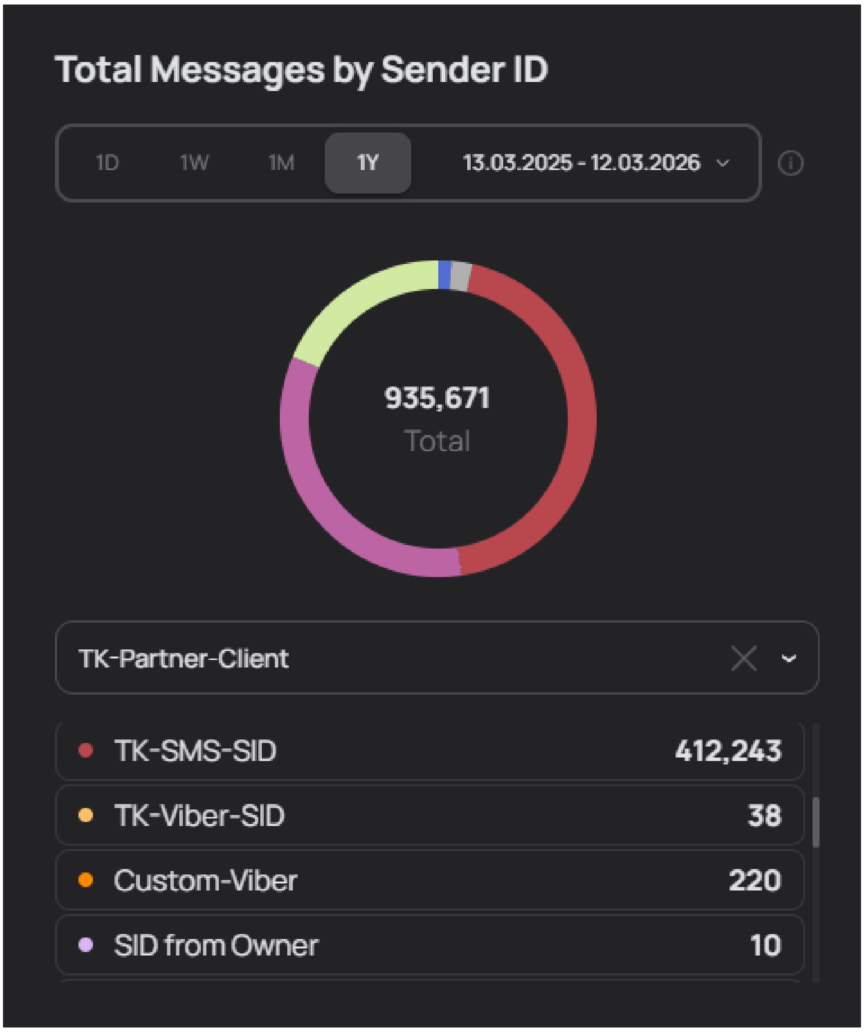
- Partners are displayed in different colors for easy perception and comparison of indicators between selected values.
- It allows enabling/disabling the display of each partner:
  - Selecting/deselecting a checkbox adds or removes the corresponding partner from the chart.
  - Each checkbox displays the partner name and the number of messages for it.
- Hovering over the chart displays the date, partner, and number of messages.



Dashboard > Total Messages by Client

Total Messages by Sender ID — a chart displaying the total number of messages by Sender ID, with the ability to select a period.

- It allows selecting a partner for which the chart will be built.
- Hovering over a chart segment displays the Sender ID and the number of sent messages for it.
- *Total* displays the total number of all sent messages by the Sender IDs of the selected partner.

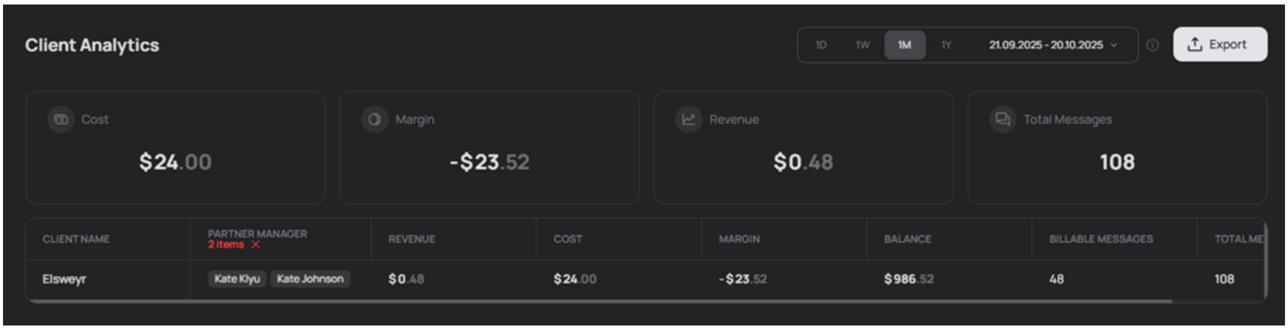


Dashboard > Total Messages by Sender ID

7.2 Client Analytics

Client Analytics contains aggregated financial metrics for all partners:

- Select a period or specify dates to display the data:



Client Analytics

NOTE: The column with partner managers is displayed depending on the *Data access for all Partners* parameter. If the user has the *View Manager Statistics* permission, the additional *Partner Manager* column is displayed, showing partner managers, and the *Export* button for exporting the table. For more information about partner managers, see the Partners 37 section.

8 Portals

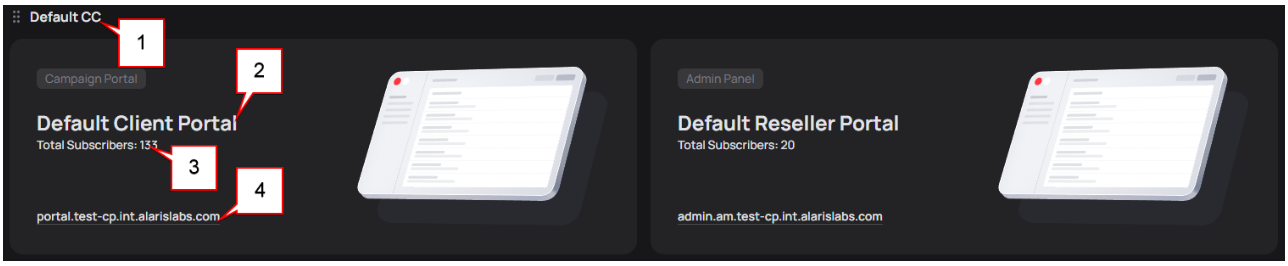
The Portals interface is designed for creating, configuring, and customizing the Admin Panel and Campaign Portal. All portals in the System are linked to legal entities (contract companies) that are created in the Settings > Contract Companies interface 140.

Upon Admin Panel installation, the System owner already has a *Default CC* — a legal entity corresponding to the company registered during System installation.

A separate portal (Admin Panel) is created for each Reseller, linked to their contract company. The Reseller accesses their portal through the link specified in the portal settings in the *Domain* parameter and works with the contract company that owns this portal.

End users who want to send campaigns through Campaign Portal also access it through the link specified in the *Domain* parameter in the corresponding portal settings. They interact with the contract company that owns this portal: they pay it, purchase SMS packages, and so on.

If a partner has multiple contract companies, each of them can own a separate Campaign Portal. In this case, the user's affiliation with a specific contract company is determined by the link (domain) of the portal through which they logged in to the System.



Portals

The interface displays portal records for all *Contract Companies* added in the Contract Companies 140 interface. Drag the tiles with the help of the button to see the most important ones at the top. Each record displays:

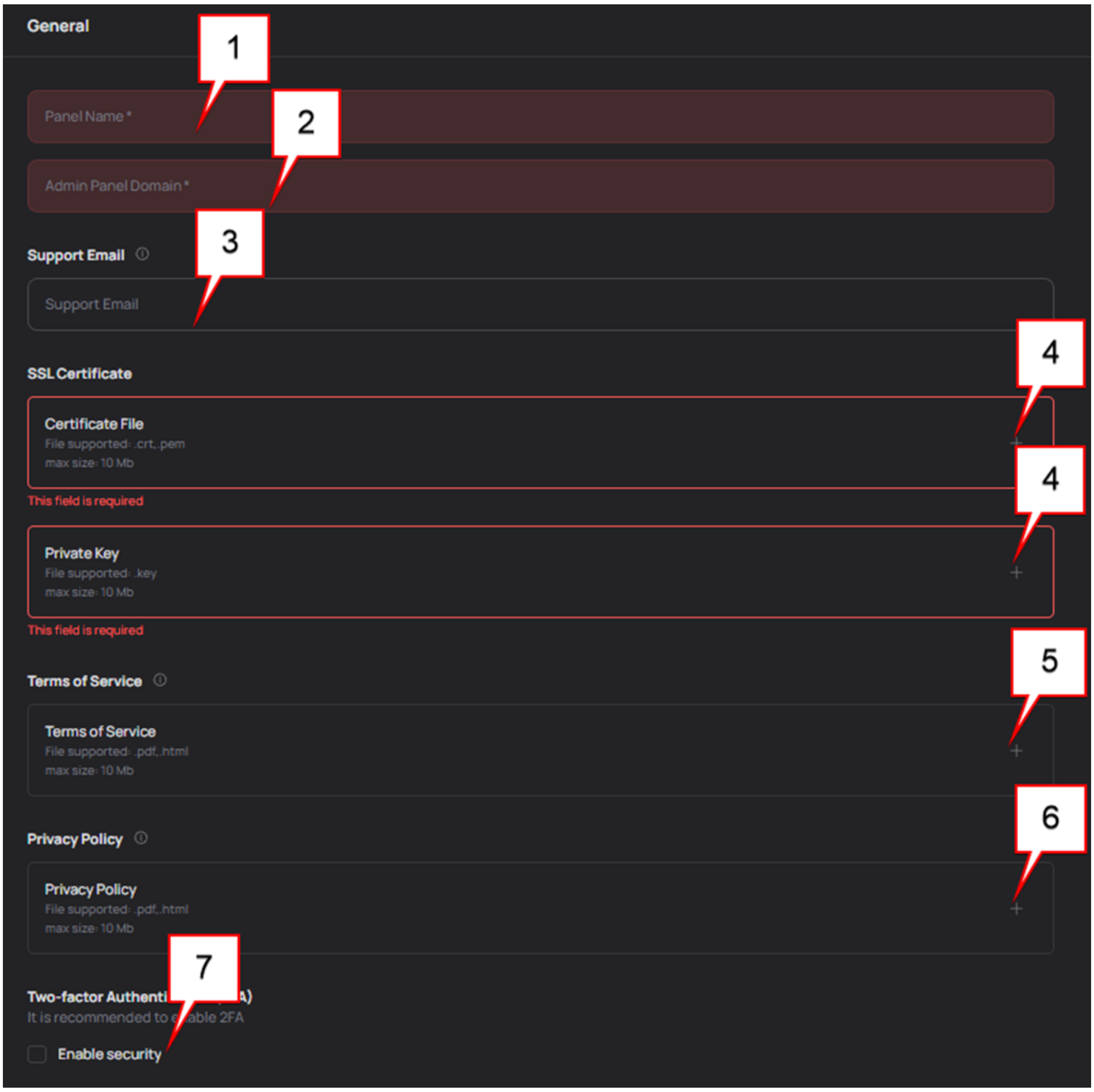
1. Contract company for which portals are configured
2. Portal Name (visible to users)
3. Domain Name (access address from settings)
4. Partner count (clients and Resellers linked to the Contract Company)

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:

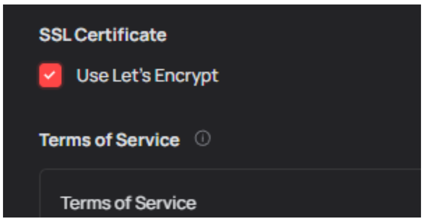
- General Settings
- Customization Settings
- Default Subscriber Settings



Create Campaign Portal (General)

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

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. Alternatively, click *Use Let`s Encrypt* for automatic generation of certificates.

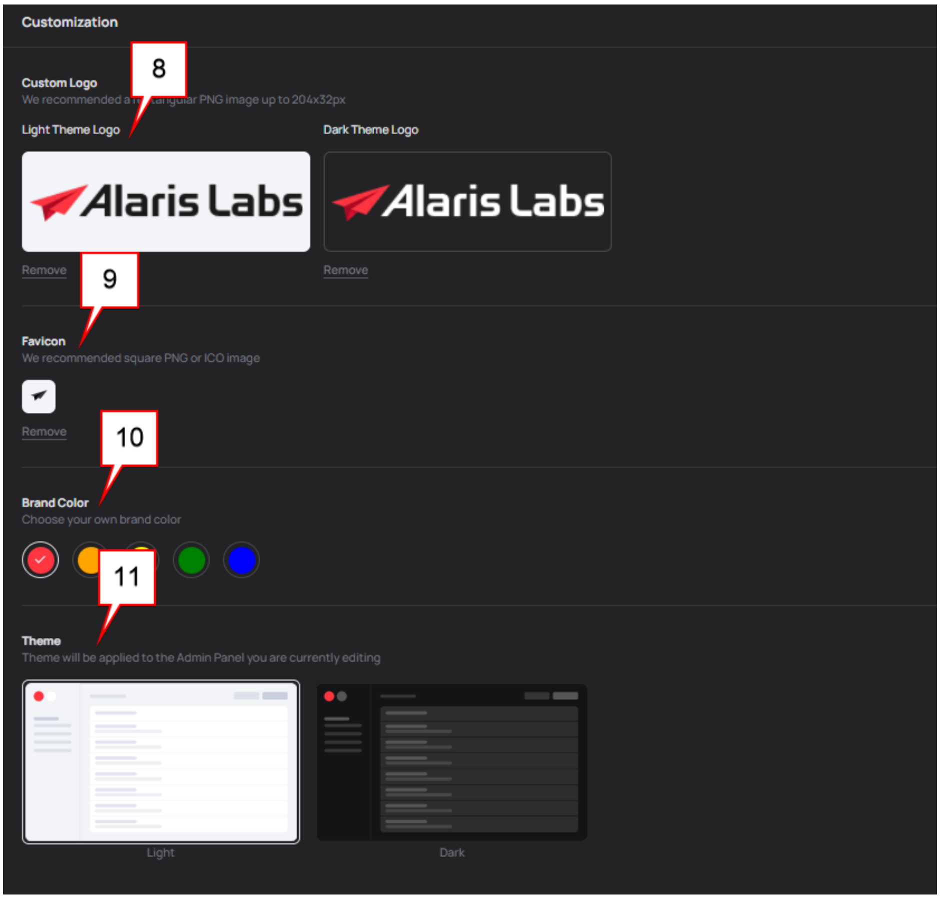


NOTE: The *Let's Encrypt* service has a number of limitations on the number of requests and operations. The limits may be related to the domain name, IP address, as well as the number of certificate issuances and reissuances within a given period of time. It is not possible to check through the ACME / Let's Encrypt interface how many limits remain or when the restriction will be lifted — the service does not provide this information. Therefore, it is not recommended to repeatedly trigger certificate generation in quick succession (for example, continuously enabling and disabling the *Use Let's Encrypt* option), as frequent attempts may result in a temporary block on certificate issuance for the domain or IP address.

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).

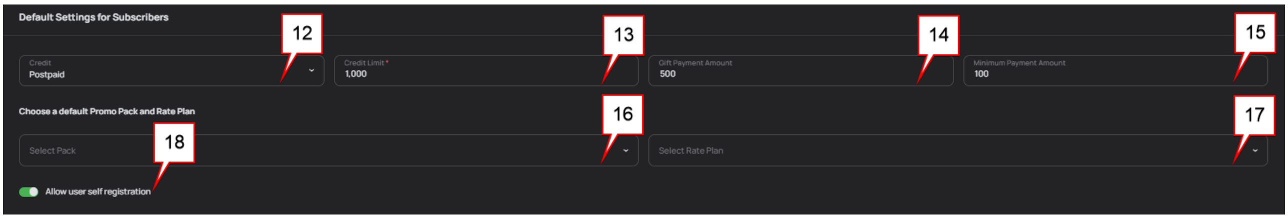
7. *Enable Security*: activate two-factor authentication (2FA). Portal users will receive the alphanumeric code and setup instructions by email.



Create Campaign Portal (Customization)

8. Custom Logo: upload light/dark theme logos that will be displayed in the main page and inside the portal. To upload a file, click on the *Remove* button, then *Upload*, and select the required file in PNG format.

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, switches, checkboxes etc.). The base color can be selected from the color palette provided. Each color is linked to a text color. The text color is predefined.
11. *Theme*: choose the *Light* or *Dark* mode.



Create Campaign Portal (Default Setting for Subscribers)

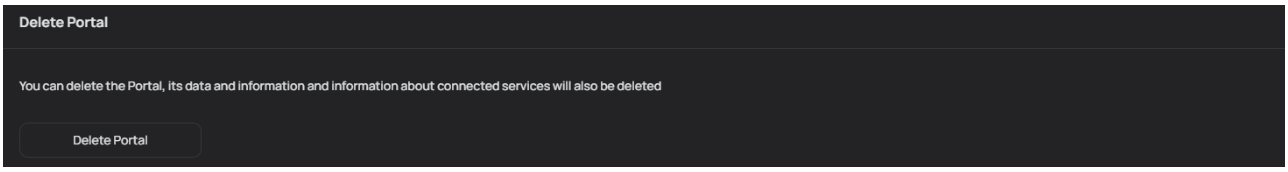
12. *Credit*: select payment type (*Prepaid* or *Postpaid*).
13. *Credit Limit*: define credit limit for *Postpaid* users.
14. *Gift Payment Amount*: set a welcome balance for all new users.
15. *Minimum Payment Amount*: specify the smallest allowed payment through a payment system.
16. *Select Pack*: 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

Admin Panel fields mirror those of the *Campaign Portal* interface, but the *Default Settings for Subscribers* section is not available.

You can edit all portal settings. Additionally, the *Delete* section is available that serves to delete the portal.



Delete Admin Panel / Campaign Portal

9 Partners

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

Here you can also assign Partner Managers.

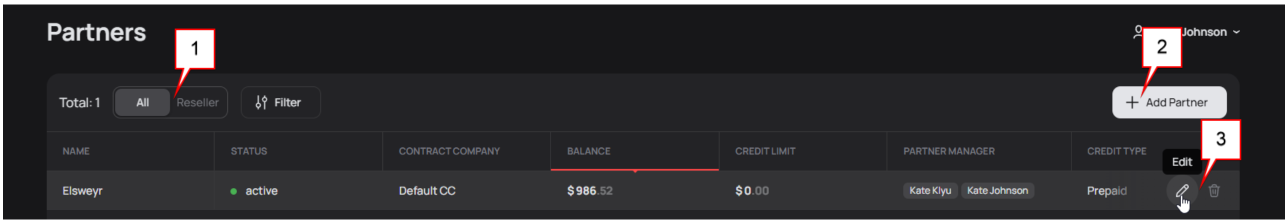
A Partner Manager's main task is to ensure that partners actively use the platform, attract their customers, and, as a result, increase the company's revenue. The manager also helps partners get started with the portal, solves their problems, and ensures that they top up their balance in a timely manner and generate revenue.

Each partner can be assigned one or more managers from among Admin Panel (*Colleague*) users, provided that this user has access to this partner's data.

Access to partner data is configured when creating or editing users (Users&Roles 104 interface) in the *Access Policies* section in the *Data access of all Partners* parameter.

Once users have been granted access to data, managers can be assigned to partners from among the available users. Managers are assigned when creating or editing a partner in the *Assigned Managers* parameter. Only those users who have this partner specified in the *View data by Partners* parameter (Users 104 interface) will be displayed in the list.

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



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.

NOTE: If you have the *View Manager Statistics* permission, the additional *Partner Manager* column is displayed in the table, showing the partner's managers.

Add Partner > Main

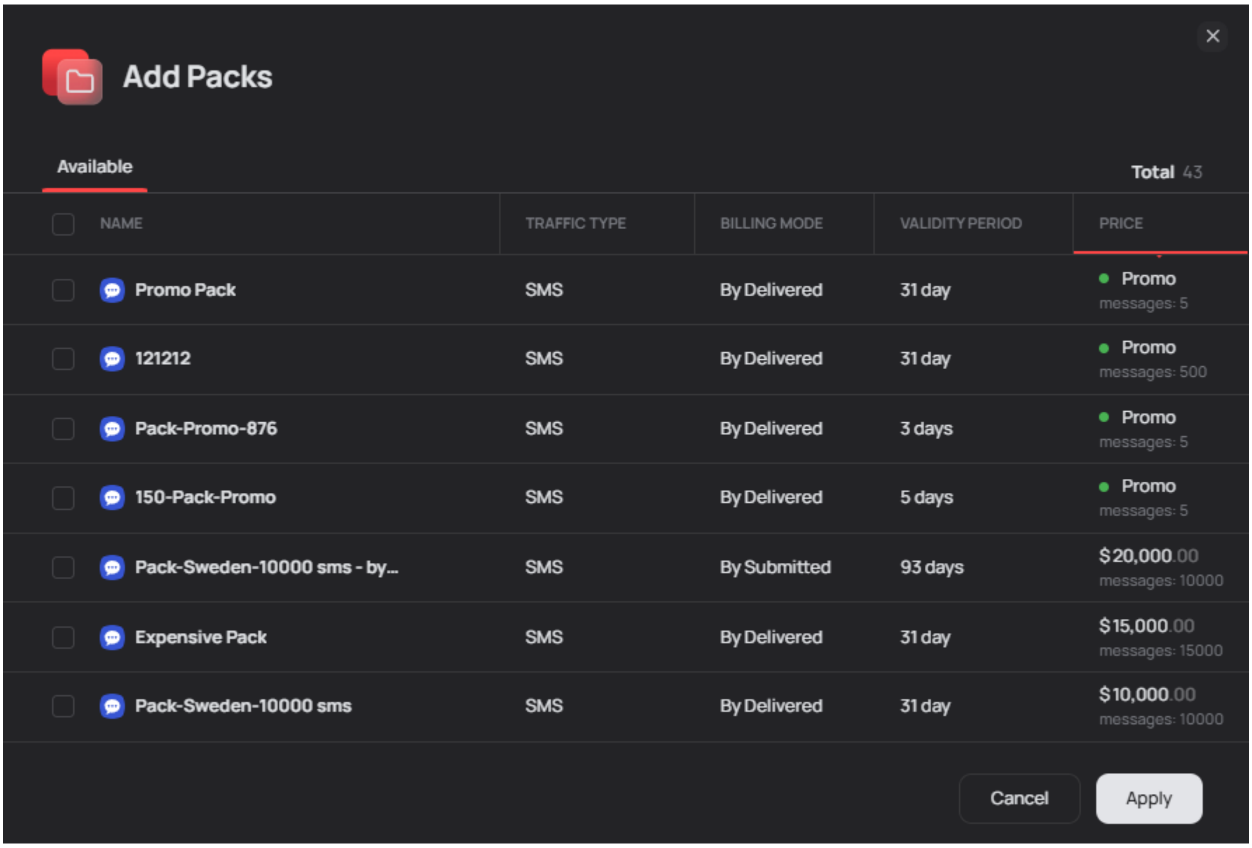
To add a Partner do the following:

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. Specify the credit limit for the postpaid service.
7. If necessary, specify the partner manager.

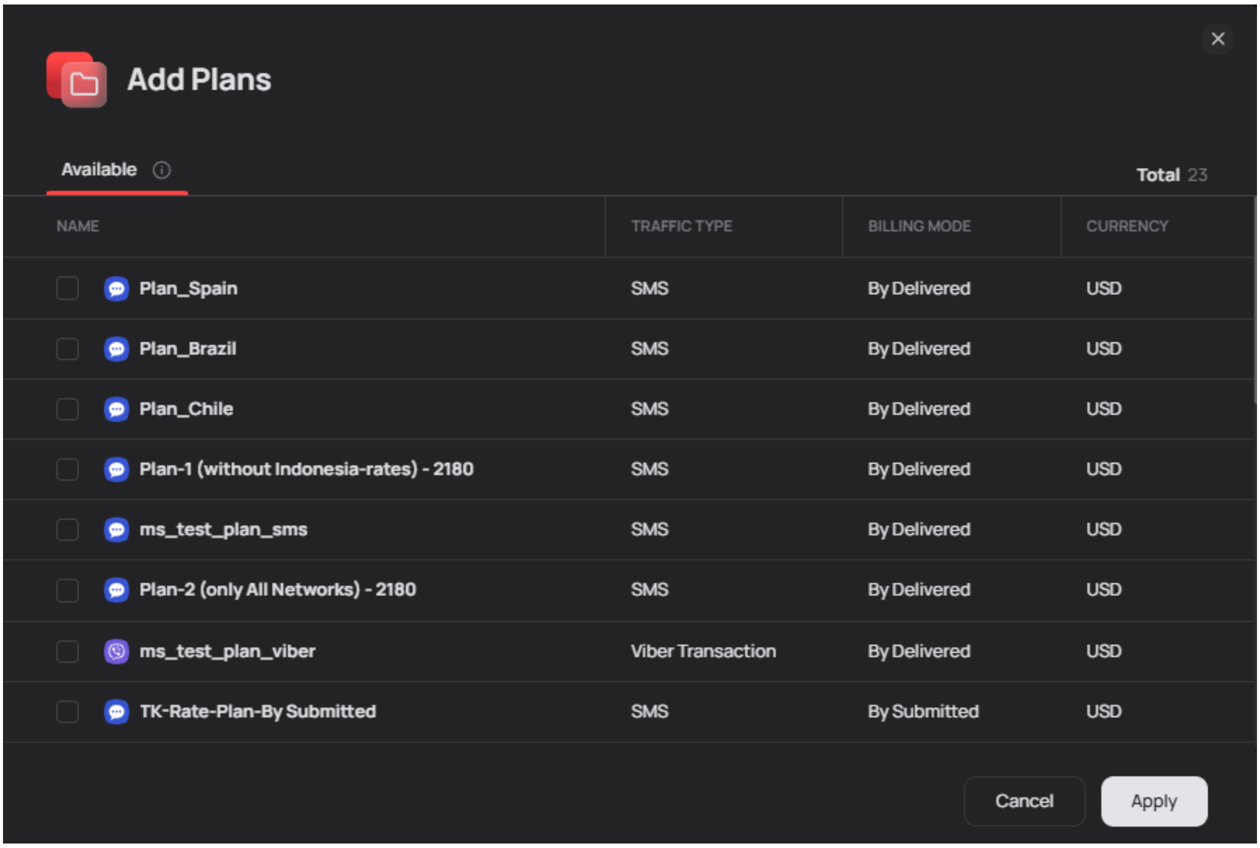
- The list displays only those users who have this partner specified in the *Data access of all Partners* parameter or *all partners* are selected by default.

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

The subscription selection window opens, displaying entries created in the Subscriptions 43 interface.



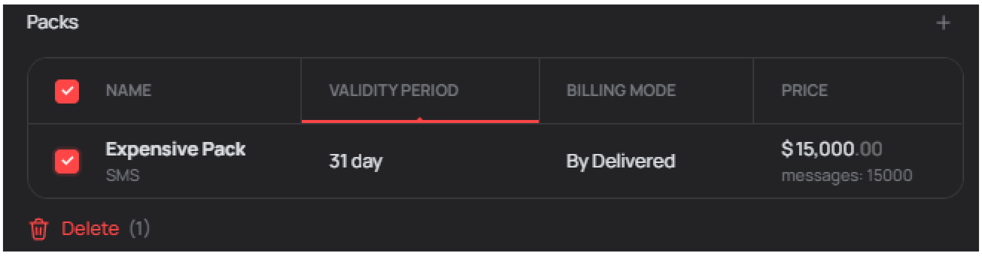
Add Packs



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.

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

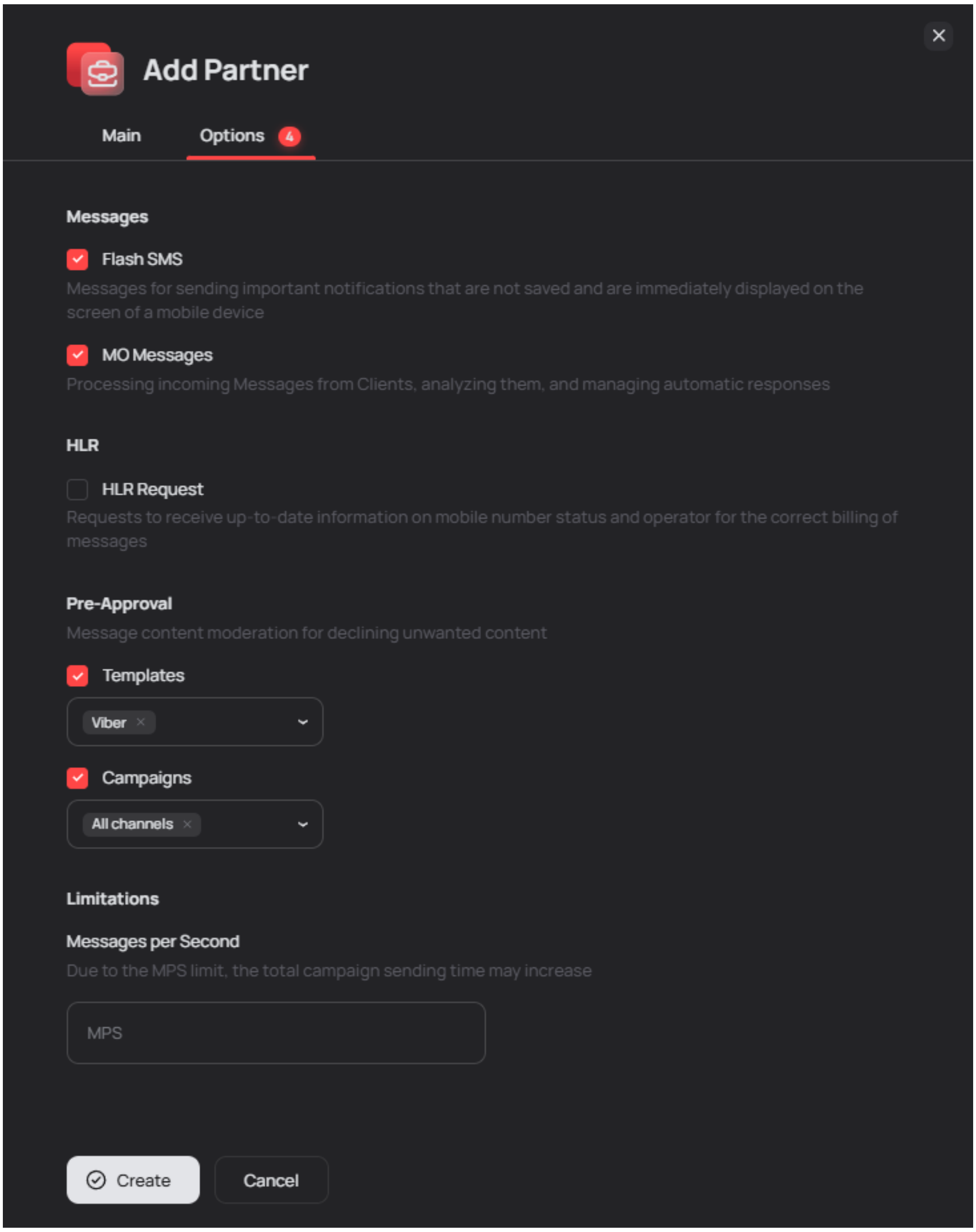


Deleting plans or packs

You 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* and *Campaign From File* interfaces 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 in the *Templates > Reply Templates* interface and enable them in the *Campaign Wizard* and *Campaign From File* interfaces when sending campaigns.
    - MO message processing is detailed in *Alaris Campaign Portal. User's Guide > Templates > Reply Templates > About Auto Reply.*

- *BSP Connections*: select the BSP (Vonage or Twilio) with which the partner interacts.
- *HLR Request*: enables HLR dipping. After it is enabled and the connection is set up in the e.212/e.164 Reference Book > HLR 139 interface, a request is first sent to HLR Proxy after the campaign is launched to get up-to-date information about the clients' mobile numbers.
- *Pre-Approval Campaigns* and/or *Templates*: enables campaign and/or template pre-moderation functionality for delivery channels.
  - After enabling the option, specify the delivery channels that will be pre-moderated.
  - When this option is enabled, a request for approval by a higher-level partner is created in the Pre-Moderation 74 interface when creating templates in the *Templates* interface or campaigns in the *Campaign Wizard* or *Campaign From File* interface.
  - For the WhatsApp channel, template premoderation is always enabled.
  - For more detail on pre-moderation, refer to Pre-moderation 74.
- *Messages per Second*: sets a limit on the number of messages sent by a partner per second.



Add Partner > Options

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

10 Subscriptions

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

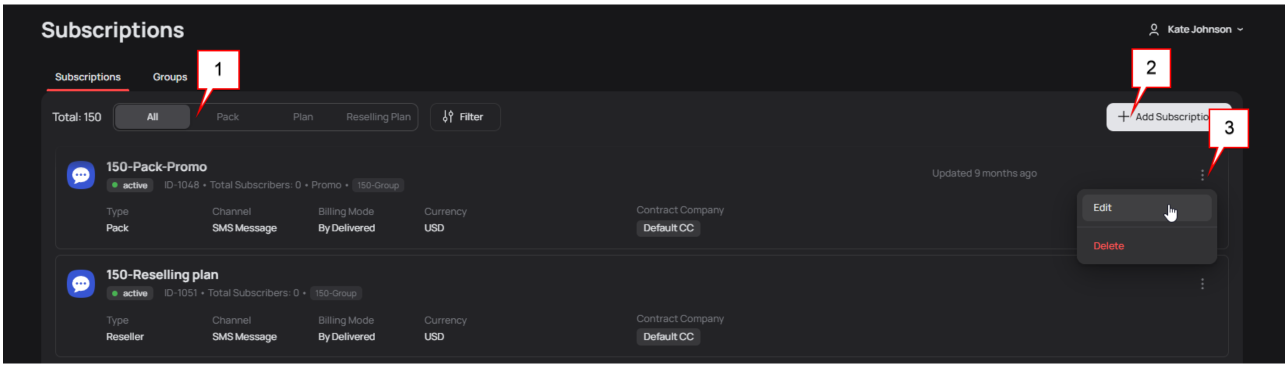
Three types of subscriptions are available in the System: Pack [43], Plan [47] and Reseller Plan [58].

The interface consists of two tabs:

- Subscriptions [43]: serves to manage subscriptions.
- Groups [58]: serves to manage groups of subscriptions.

10.1 Subscriptions tab

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



Subscriptions

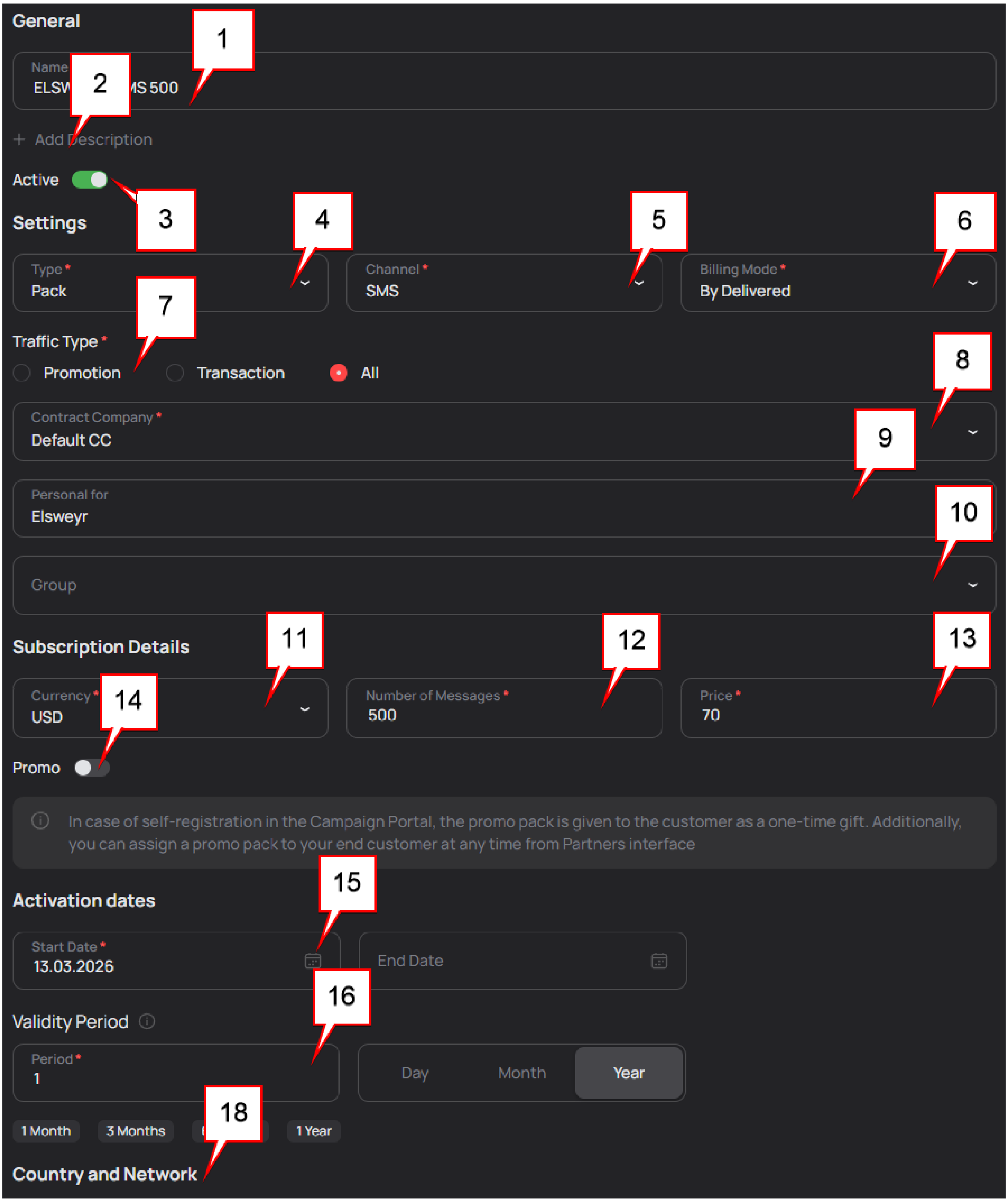
The following options are available:

1. Apply the filter to display all subscriptions or subscriptions of a specific type (*All, Pack, Plan, 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. You can delete a subscription only if it has no active subscribers.

10.1.1 Packs

Message Pack is a prepaid package with a fixed price containing a predetermined number of messages.

- It does not contain rates, only the countries and networks it covers.
- An unlimited number of subscribers can be subscribed to one pack.
- It is possible to purchase multiple packs for the same channel. If a client has several packs covering the same networks/countries, messages are sent first from the pack that has already been started or from the one purchased earlier.
- If end users still have messages remaining in a closed pack, they can still be sent, but a second pack of that type cannot be purchased.



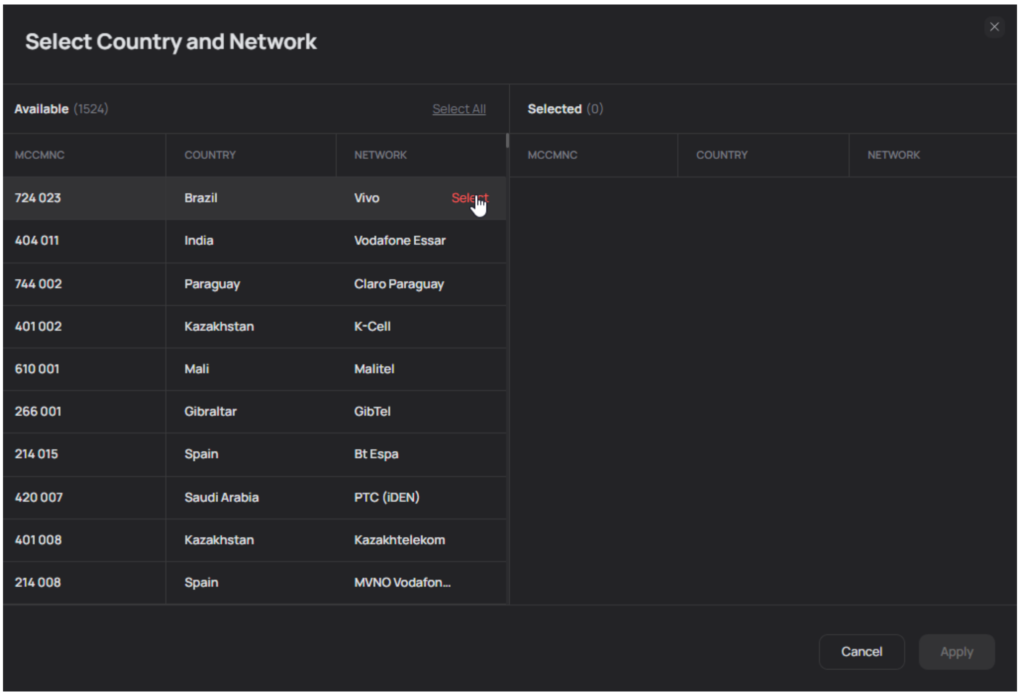
Add Subscriptions (Pack)

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

1. Enter the subscription name.
2. If necessary, add a description for the subscription.
3. Enable or disable the subscription.

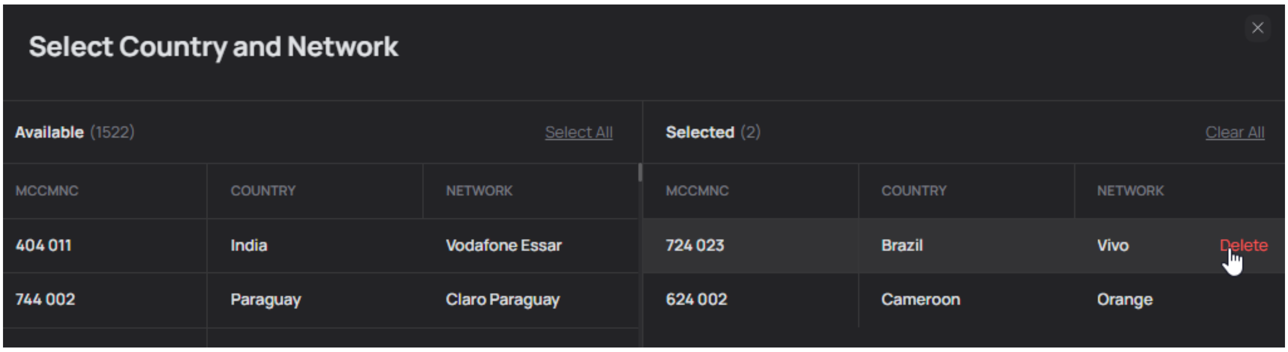
4. Select the subscription type.
5. Select the delivery channel.
6. Select the billing mode type.
7. Specify the traffic type:
   - For SMS: *All* (any), *Transaction*, or *Promotion*
   - For Viber: *Transaction* or *Promotion*
   - For WhatsApp: *Marketing*, *Utility*, or *Authentication*
8. Select the contract company for which this subscription will be available. Multiple companies can be selected. Contract companies are created in the Contract Companies 140 interface.
9. Select the partners for whom this subscription will be visible. Multiple partners can be selected. The list displays only those partners that belong to the contract company specified above.
10. If necessary, select a subscription group. Only one group can be selected. Groups are created in the Groups 58 tab.
11. Select the currency (currently only USD).
12. Specify the pack volume (number of messages included).
13. Specify the pack price in the selected currency.
14. If necessary, enable the promo pack checkbox:
    - In this case, the *Price* parameter is set to 0 and is not editable.
    - This pack can be selected when creating a portal in the *Select Pack* parameter, after which it will be available to self-registered users. Such packs are not displayed in the *Campaign Portal* > *Purchase* interface.
15. Specify the pack start and end dates.
16. Specify the time period during which the pack can be active after purchase, regardless of the start and end availability dates (1, 3, 6 months, 1 year, or a custom value).
17. Add the list of countries and networks to be included in this subscription by clicking the *Add Entry* button. The list of countries and networks is taken from the Reference Book 137.

In the window that opens, click the *Select* button to choose the required countries and networks.



Select Country and Network (Select)

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



Select Country and Network (Delete)

To save the selected countries and networks, click *Apply*. Click *Cancel* to cancel the action.

After filling in the parameters, click *Create*.

When creating new subscriptions, a uniqueness check is performed: the System must not contain two subscriptions with the same name.

Click *Cancel* to cancel the action.

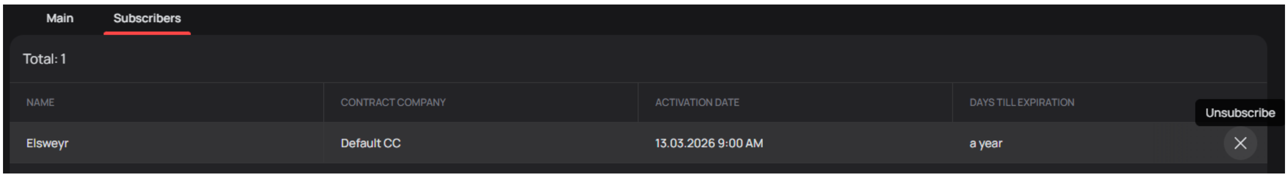
The subscription editing window is divided into two tabs:

1. *Main* — the main subscription parameters.
   - The layout of the window is similar to the subscription creation window.
   - All fields are available for editing if no one is subscribed to the subscription; otherwise, only the name, comment, contract company, partner, and group can be changed.

- There is currently a limitation when editing a pack: the list of countries and networks cannot be changed. To make changes, close the pack with a specific date, create a new one, and make the necessary edits. A new pack with the updated data will then be created.

2. *Subscribers* — the partners for whom this subscription is available.

   - You can unsubscribe a partner by clicking the action in the row.



Edit Subscriptions > Subscribers

NOTE: For subscriptions created for the SMS channel prior to version 1.8.0, *Traffic type* is set to All traffic.

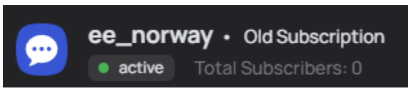
10.1.2 Plans

A *Rate Plan* is a standard postpaid rate plan with a pre-set rate, designed for sale to end clients.

- It contains rates for various destinations.
- An unlimited number of subscribers can be linked to one plan.
- One plan can contain rates for different traffic types and Sender IDs.
- When creating a portal, the *Select Plan* parameter allows specifying a plan that will be available to self-registered users.

NOTE: Prior to version 1.8.0, a partner could have up to 6 plans divided by channel and traffic type, where each rate plan corresponded to one channel and one traffic type (SMS, Viber Transaction, Viber Promotion, WhatsApp Marketing, WhatsApp Utility, WhatsApp Authentication). Starting from version 1.8.0, a new model is introduced in which the number of rate plans per client is limited to three — one per channel.

When updating the System to version 1.8.0, all rate plans created prior to version 1.8.0 are retained and marked with the *Old Subscription* flag:



Old Subscription

Such subscriptions:

- Still participate in billing, but cannot be edited. They can only be viewed, deleted, or have their rates exported.
- Are not available for purchase.

The System may contain multiple *Old Subscription* plans for the same channel if they were created prior to version 1.8.0.

When attempting to create a new rate plan, the System checks whether the partner already has a plan for the selected channel. If a rate plan for that channel already exists, creating a new one is not allowed.

Add Subscription (Plan)

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

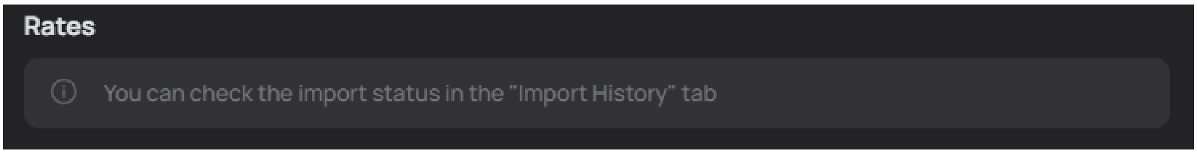
1. Enter the subscription name.
2. If necessary, add a description for the subscription.
3. Enable or disable the subscription.
4. Select the subscription type.
5. Select the delivery channel.
6. Select the billing mode type.
7. Select the contract company for which this subscription will be available. Multiple companies can be selected. Contract companies are created in the Contract Companies 140 interface.
8. Select the partners for whom this subscription will be visible. Multiple partners can be selected. The list displays only those partners that belong to the contract company specified above. If the selected partner already has a plan for this channel, an error will be displayed below the field.

9. If necessary, select a subscription group. Only one group can be selected. Groups are created in the *Groups* tab.

10. Select the currency (currently only USD is available).

11. Add rates by clicking the *Import Rates* button. Clicking the button opens the [Import Rates](53) interface.

After uploading the rates and closing the [Import Rates](53) interface, click *Create*. The subscription creation form will remain open, and you can check the upload status by navigating to the *Import History* tab.

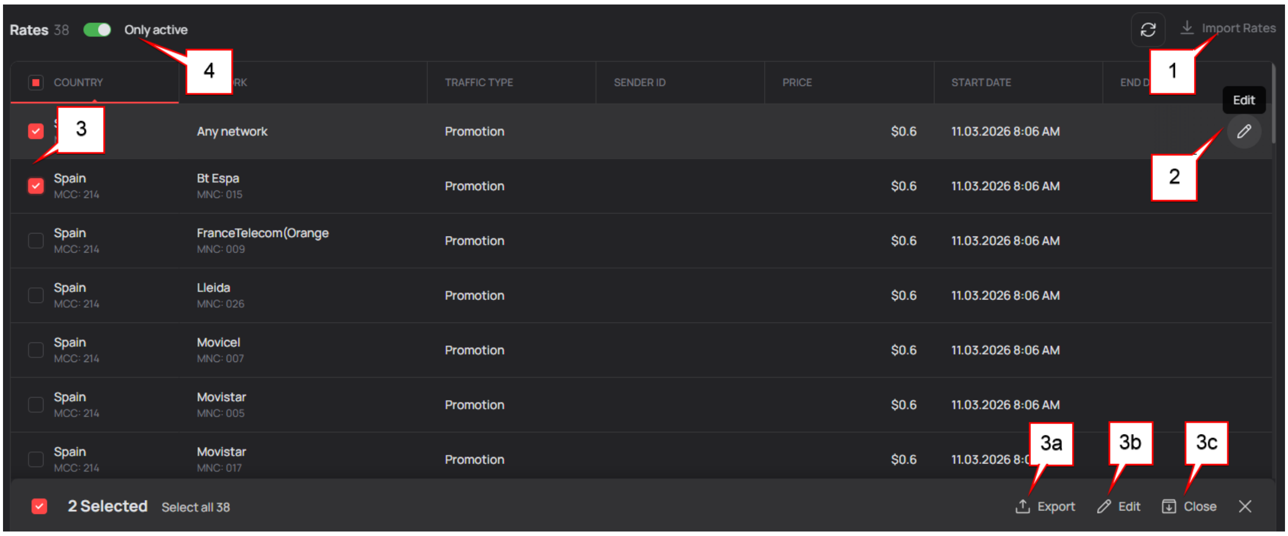


Once the import is complete, a table with the rates will be displayed. Click *Cancel* to cancel the action (before clicking *Create*) or to close the modal window.

The subscription editing window is divided into three tabs: *Main*, *Subscribers*, and *Import History*.

The **Main** tab contains the main subscription parameters.

- The layout of the window is similar to the subscription creation window.
- All fields are available for editing if the subscription has no active subscribers; otherwise, only the name, comment, contract company, partner, and group can be changed.
- At the bottom of the window, a table with the rates linked to the subscription is displayed:



Edit Subscriptions > Main

You can:

1. Upload new rates by clicking the *Import Rates* button, which opens the [Import Rates](53) interface.

2. Edit an existing rate by selecting the *Edit* action, which opens the *Edit Rate* window.

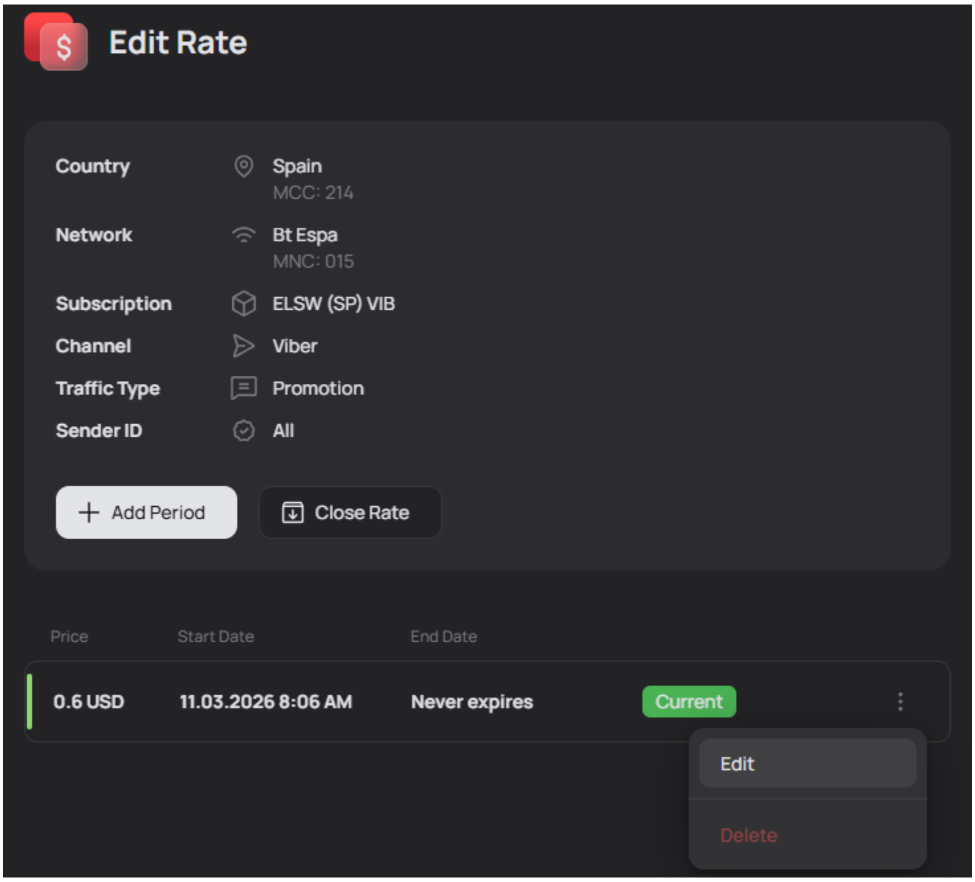
3. Select two or more rates and specify what to do with them:

   a. Export — clicking the *Export* button starts exporting the rates to your device.

   b. Edit — clicking the *Edit* button opens the bulk rate editing window *Edit Rates*.

   c. Close — clicking the *Close* button opens the bulk rate closing window.

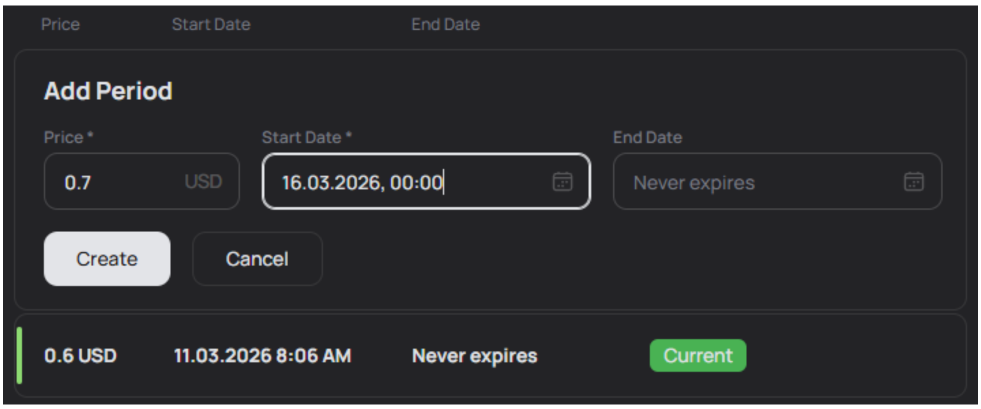
4. Enable the display of active rates.



Edit Subscriptions > Main > Edit Rate

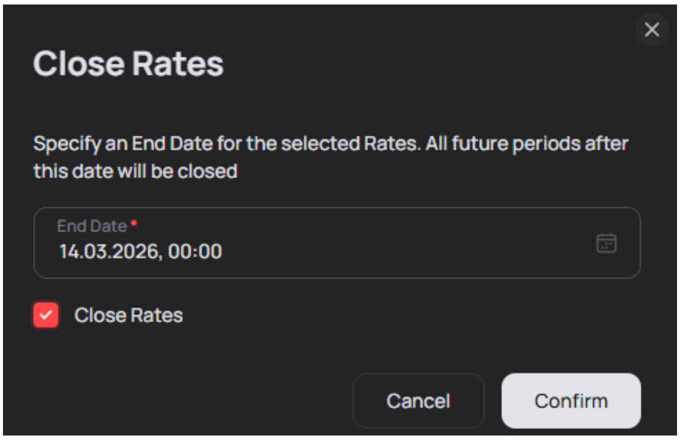
When editing a rate, you can:

- Add a new period by clicking the *Add Period* button:
  - Specify the new price and the start date of the new period.
  - If necessary, specify the end date.



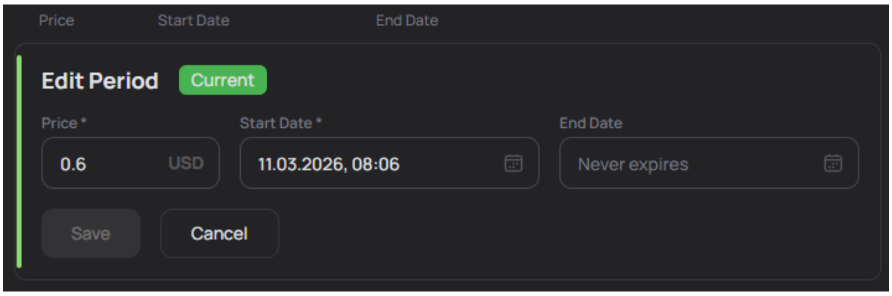
Edit Rate > Add Period

- Close the rate by clicking the *Close Rate* button:
  - Specify the period closing date and confirm the rate closure.



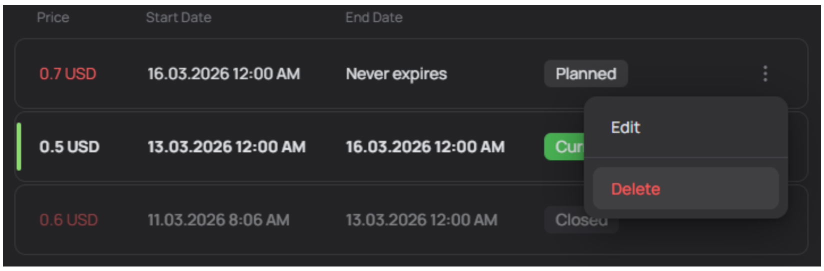
Edit Rate > Close Rates

- Edit a period by clicking the *Edit* button:
  - Specify the new price and the start date of the new period.
  - If necessary, specify the end date.



Edit Rate > Edit Period

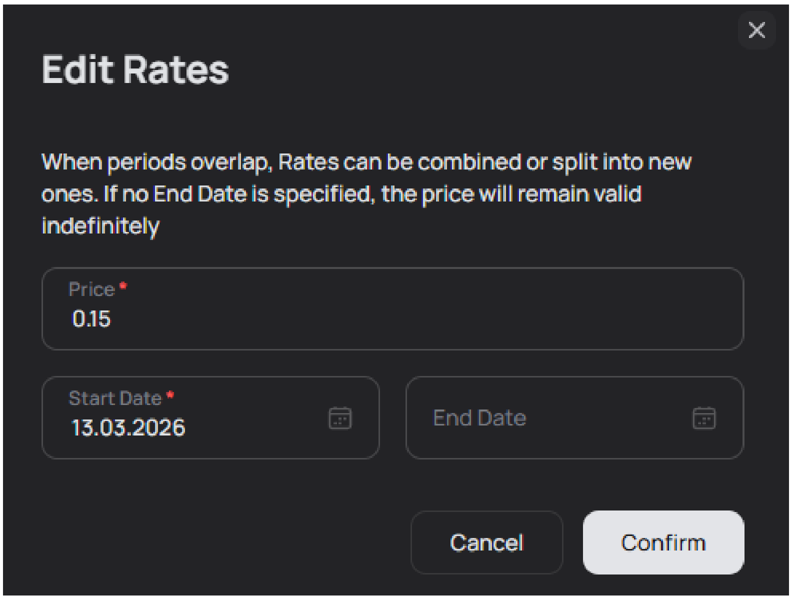
- Delete a period by clicking the *Delete* button.
  - Only scheduled rates can be deleted.



Edit Rate > Delete

When bulk editing rates:

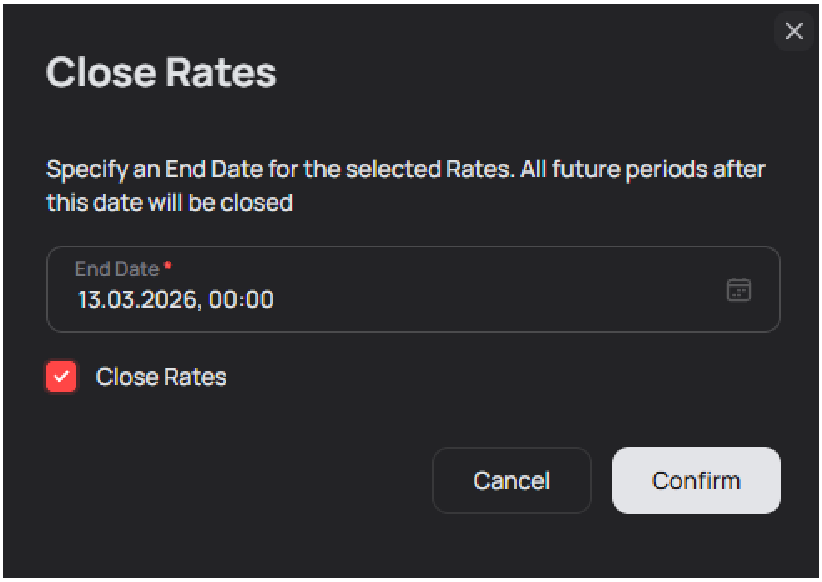
- Specify the new price and the start date of the new period.
- If necessary, specify the end date.



Edit Subscriptions > Main > Edit Rates

When bulk closing rates:

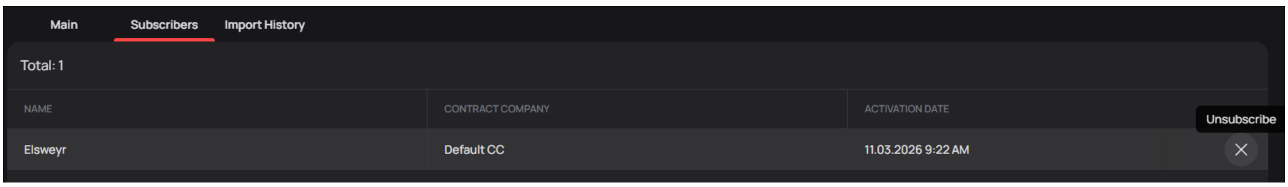
- Specify the end date and confirm the rate closure.



Edit Subscriptions > Main > Close Rates

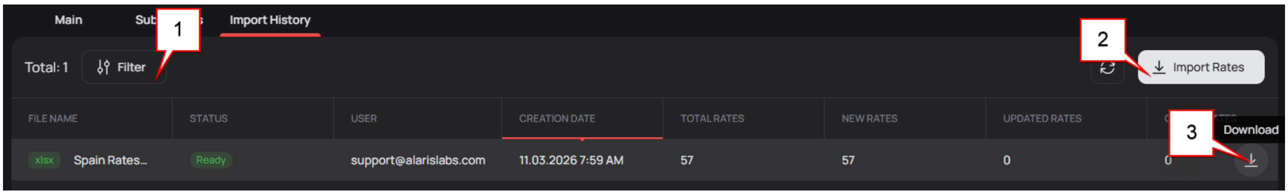
The **Subscribers** tab shows the partners for whom this subscription is available.

You can unsubscribe a partner by clicking the action in the row.



Edit Subscriptions > Subscribers

The **Import History** tab displays the rate import history.



Edit Subscriptions > Import History

You can:

1. Filter the required records.
2. Upload new rates by clicking the *Import Rates* button, which opens the Import Rates 53 interface.
3. Download a previously uploaded rates file.

10.1.2.1 Import rates

The System supports four rate types:

- *MCCMNC* — a rate for a specific network (exact MCC and MNC match).
- *Any Networks (MCC%)* — a wildcard rate covering all possible MNCs for a given MCC, including both those present in the e.212/e.164 reference book 136 and those absent from it.
  - It is applied as the first fallback after an exact MCCMNC match.
  - It is applied regardless of whether the network is present in the e.212/e.164 reference book 136.
  - It covers both known and unknown MNCs for the given MCC.
  - It has higher priority than *All Networks*.
- *All Networks (MCC)* — a rate for an MCC, aggregated across all MNCs present in the e.212/e.164 reference book 136.
  - It is applied as the second fallback.
  - It is applied if neither an exact MCCMNC match nor an *Any Networks* rate is found.
  - It always has lower priority than *Any Network*.
  - It is created when importing an aggregated MCC.
- *ROW* — a special network (MCC 777) used as a global fallback when no price is set for MCCMNC, MCC%, or MCC.

When importing rates, the System must unambiguously determine whether a rate applies to a specific network (MCCMNC), to *Any Network (MCC%)*, or to *All Networks (MCC)*.

The interface is designed for bulk rate upload and consists of several steps:

- *Upload your file* — uploading the rates file.
- *Mapping Data* — mapping file columns and configuring parameters.
- *Rates Analysis* — preliminary import analysis.

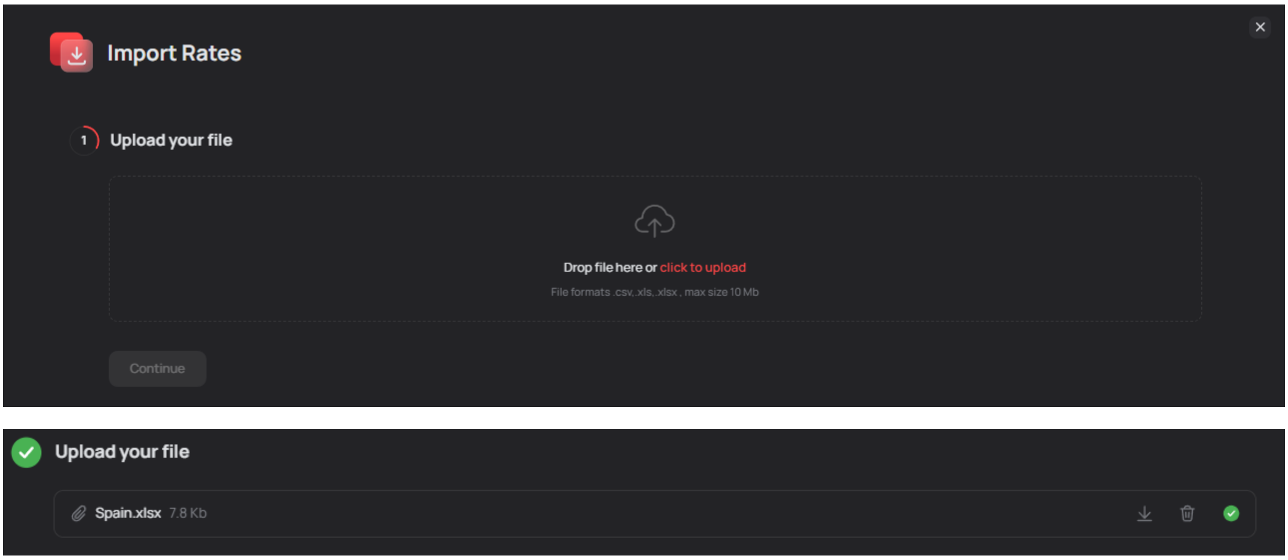
Each step is clickable. You can return to any of them.

The *Upload your file* step contains a window for uploading the rates file:

- Supported formats: CSV, XLS, XLSX.
- Maximum file size: 10 MB.

You can:

- Click the *Drop File* button or drag and drop a file into the window.
- Download the uploaded file, delete it, and upload a new one.



Import Rates > Step 1: Upload your file

After the file is uploaded, the System parses it and generates a preview, which is used in the *Mapping Data* step.

In the *Mapping Data* step, you need to map the file columns to the System columns.

1. If rates already exist in the vendor product or subscription, the System will offer a *Merge Option*:
    - *Update*: when this checkbox is enabled, existing rates are updated and missing ones are created. It is generally used to update the *Start Date*, *End Date*, and *Price* parameters (any combination of these three fields). It is selected by default.
    - *Close*: when this checkbox is enabled, existing rates are closed with the specified date. In the *Close* mode, matching rates are closed with the selected dates.
2. The System will then prompt you to map the columns:
    - Required: *MCCMNC*, *Price*, and *Country*.
    - Optional: *Country*, *Network*, *Start & End Date*, *MCC*, *MNC*, *Traffic Type*, *Sender IDs*, *Country Dial Code*. The date format in the file is automatically changed to the date format specified by the user in *Account Settings*.

When the MCC column from the file is mapped as MCCMNC:

- If the MCC is present in the reference book, the rate is created with *All Networks*
- If the MCC is not present in the reference book, two records are created:
    - MCC / Country / empty MNC / *All Networks*

- MCC / Country / MNC with value % / *Any Network*

The MCC and Country values are taken from the file. If these columns are empty in the file, an error is displayed in *Rates Analysis*.

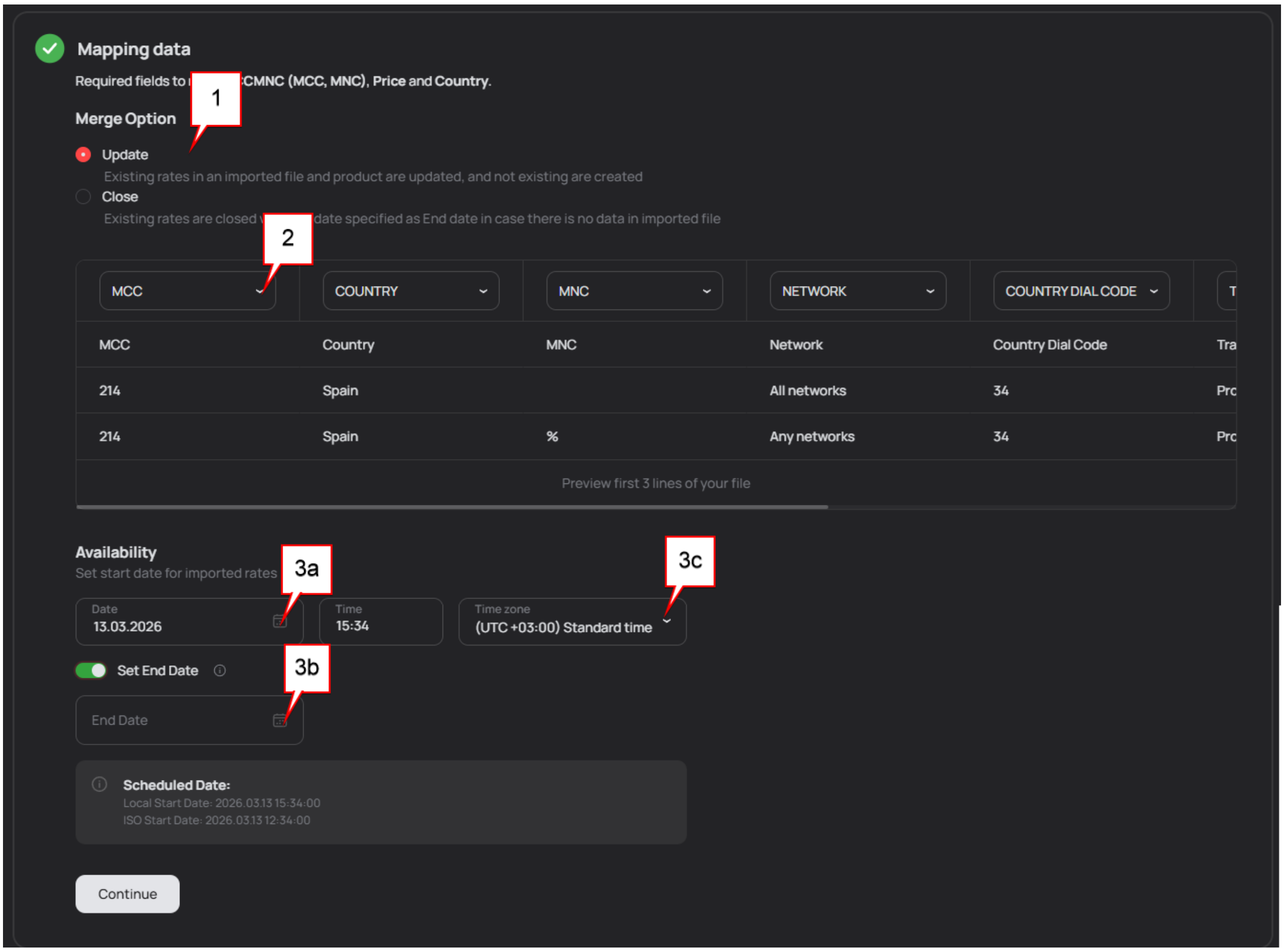
If the *Country Dial Code* column is not populated in the file and cannot be found in the reference book, an error is displayed in *Rates Analysis*. If the column is populated, the value is taken from the file regardless of whether it exists in the reference book.

If MCC and MNC from the file are specified in separate columns:

- If the MNC value in the file is empty, the rate is created with *Any Network*.
- If the MNC value in the file is populated, the rate is created for a specific network (MCCMNC).

3. After mapping the columns, specify the date, time, and time zone for the imported rates.
    - *Start Date*: select the start date for the rates.
        - If the file contains a *Start Date* column and its value is successfully parsed, the value from the file is used.
        - If the column is absent, the value is empty, or it cannot be parsed, the value specified in the import parameters in the interface is used, where the default value can be set (current date and time).
    - *End Date*: select the end date for the rates.
        - If the file contains an *End Date* column:
            - If the value is valid, the value from the file is used.
            - If the value is empty, *Never expire* is set.
        - If the column is absent or cannot be parsed, the value specified in the import parameters in the interface is used, where the default value can be set (*Never expire*).

- *Time zone*: a drop-down list for selecting the time zone.



Import Rates > Step 2

After filling in all the required parameters, click *Continue* to proceed to the *Rates Analysis* step.

NOTE: The System supports importing rates with a start/end date in the past.

Before confirming rate import at the *Rates 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 Book 136.

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.*

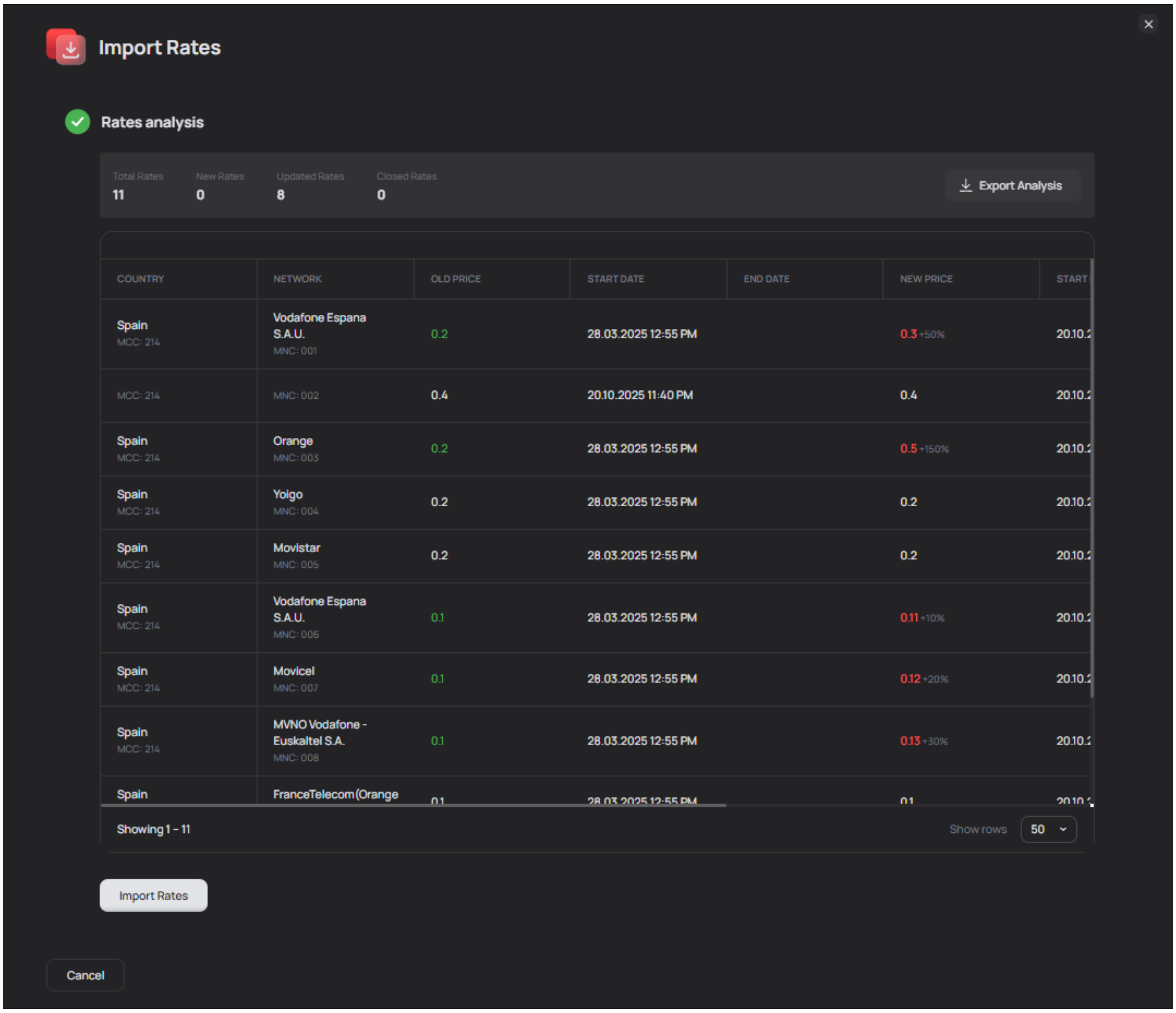
The import summary contains the following values:

- *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 the *active till* date 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

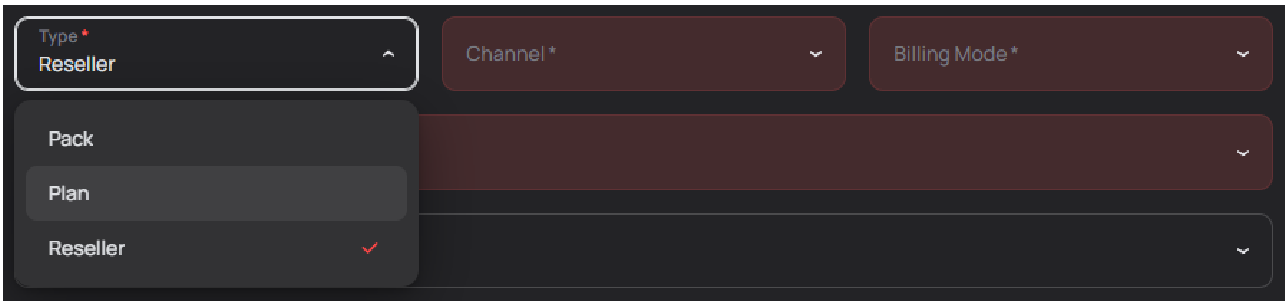
Click the *Import Rates* button to complete the process. The *Cancel* button discards all actions.

10.1.3 Reseller plans

A *Reseller Plan* is a rate plan designed to allow resellers to generate new rate plans based on it for resale to their own resellers or clients.

- An unlimited number of resellers can be linked to one Reseller Plan.
- For the System owner, the Reseller Plan is displayed in the Subscriptions interface; for the reseller, it is visible in Vendors > Products.

Creating and editing a Reseller Plan is the same as for Plans — you only need to select the required subscription type:



Add Subscriptions (Reseller Plan)

For a reseller to create subscriptions for their lower-level partners, the Reseller Plan must contain rates:

- The reseller exports the rates from it and creates their own price lists in CSV format.
- The reseller creates plans of the required type in the Subscriptions interface and uploads the generated price lists there.

10.2 Groups tab

Subscription groups are used to link client subscriptions to a specific vendor and endpoint, which makes it possible to account for differences in service quality and offerings between different providers.

You create a group, add subscriptions to it, and specify this group in the endpoints.

When sending a campaign, the routing first looks for all suitable endpoints where a subscription group is specified.

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

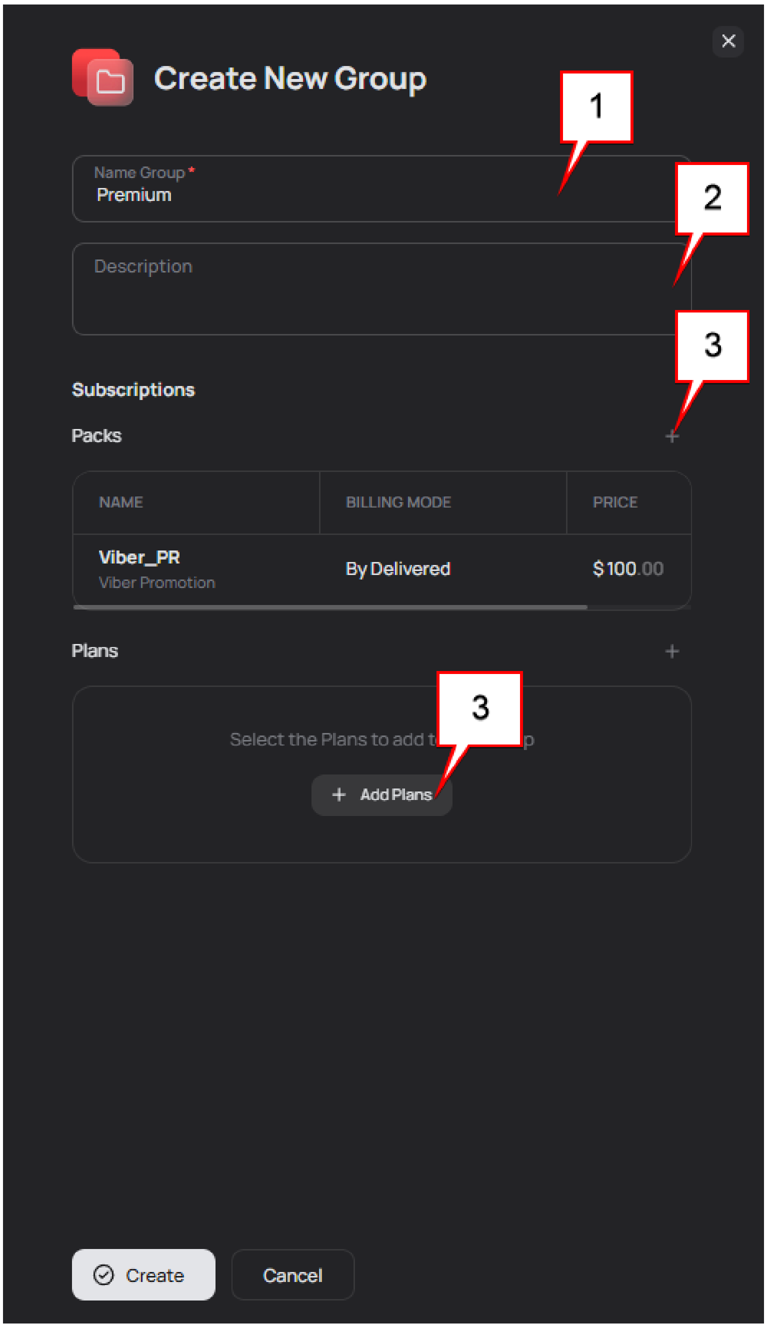
Groups

You can:

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.



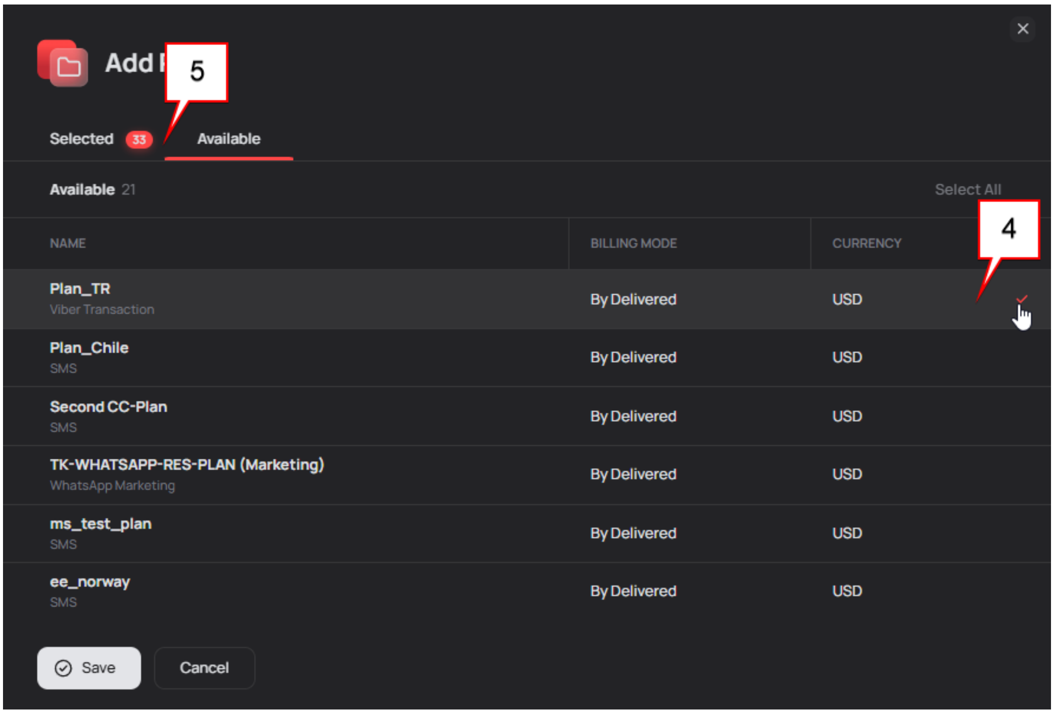
Create New Group

To add a new group, complete the following parameters:

1. Enter the group name.

2. Optionally add the group description.

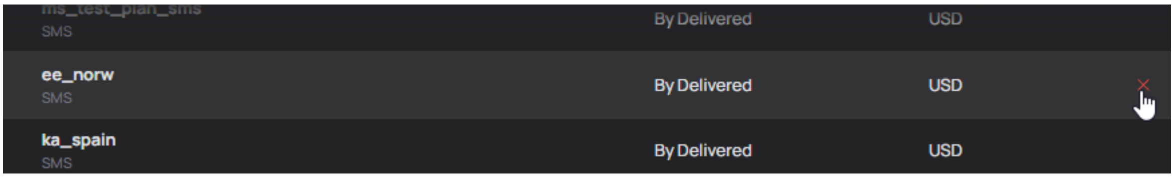
3. Select required subscriptions by clicking the *Add Packs* or *Add Plans* button or +.



Add Plan

4. In the window that opens, select the necessary subscriptions.
5. The selected subscriptions will be displayed in the *Selected* tab.

To remove a subscription from a group, go to the *Selected* tab and click on the cross.



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.

11 Vendors

The *Vendors* interface is designed for configuring vendor products and traffic routing.

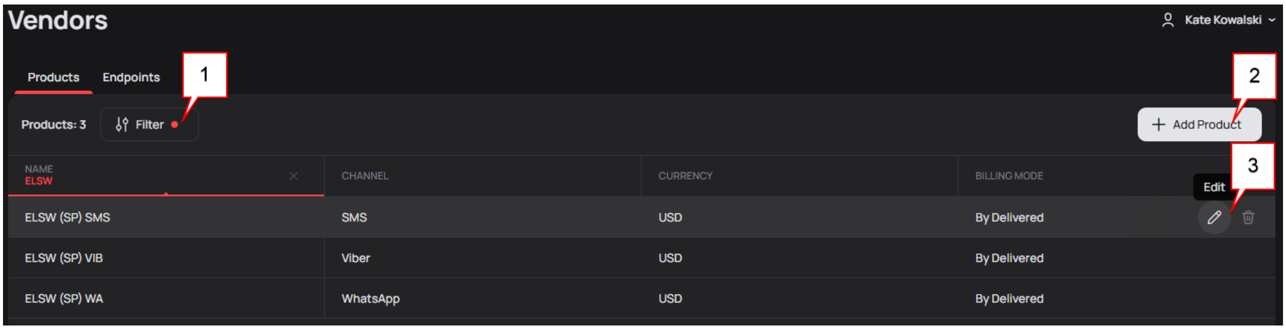
Vendors are carriers to which the System owner supplies traffic. To configure vendors, you need to:

1. Create a product in the Products 61 tab and upload rates to it.
2. In the Endpoints 63 tab, create an endpoint tab to which the product will be routed.

For Resellers, only the Products 61 tab is available:

- Rates appear in this tab only after a subscription has been assigned to the reseller by a higher-level partner.
- There is no import functionality and no endpoints. Only rates passed down from above are available.
- Rate parameters (currency, traffic type, name, validity dates, country, network) are determined by the corresponding parameters of the correlated Reseller Plan.

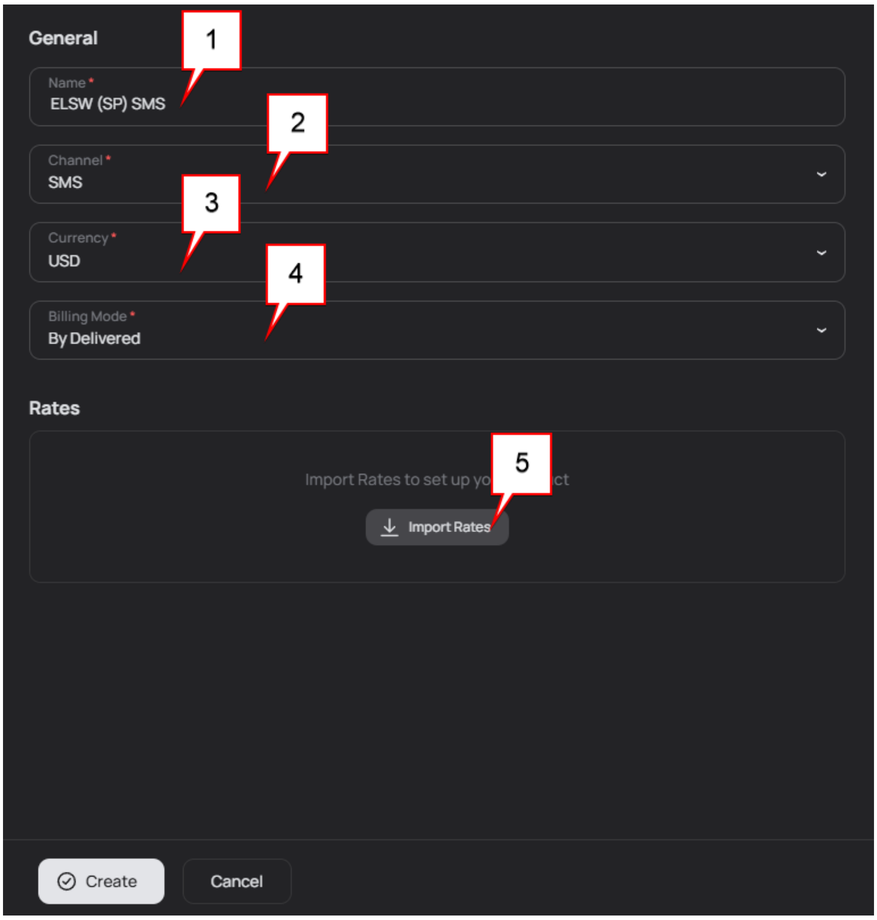
11.1 Products



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:

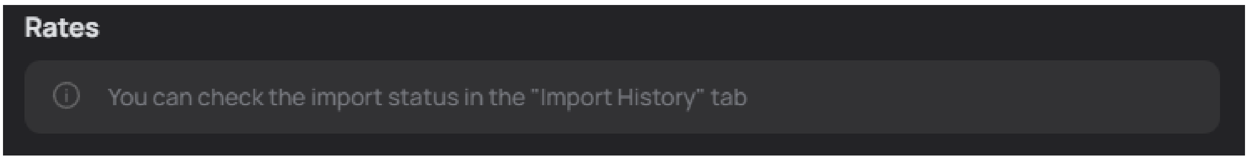


Add Product

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

- Specify the name of the product.
- Choose delivery channel (*SMS, Viber* or *WhatsApp*).
- Select the currency.
- Choose the billing type (*By Delivered* or *By Submitted*).
- Click *Import rates* to add rates. The button opens the Import rates 53 interface.

After uploading the rates and closing the Import rates 53 interface, click *Create*. The product creation form will remain open, and you can check the upload status by navigating to the *Import History* tab.



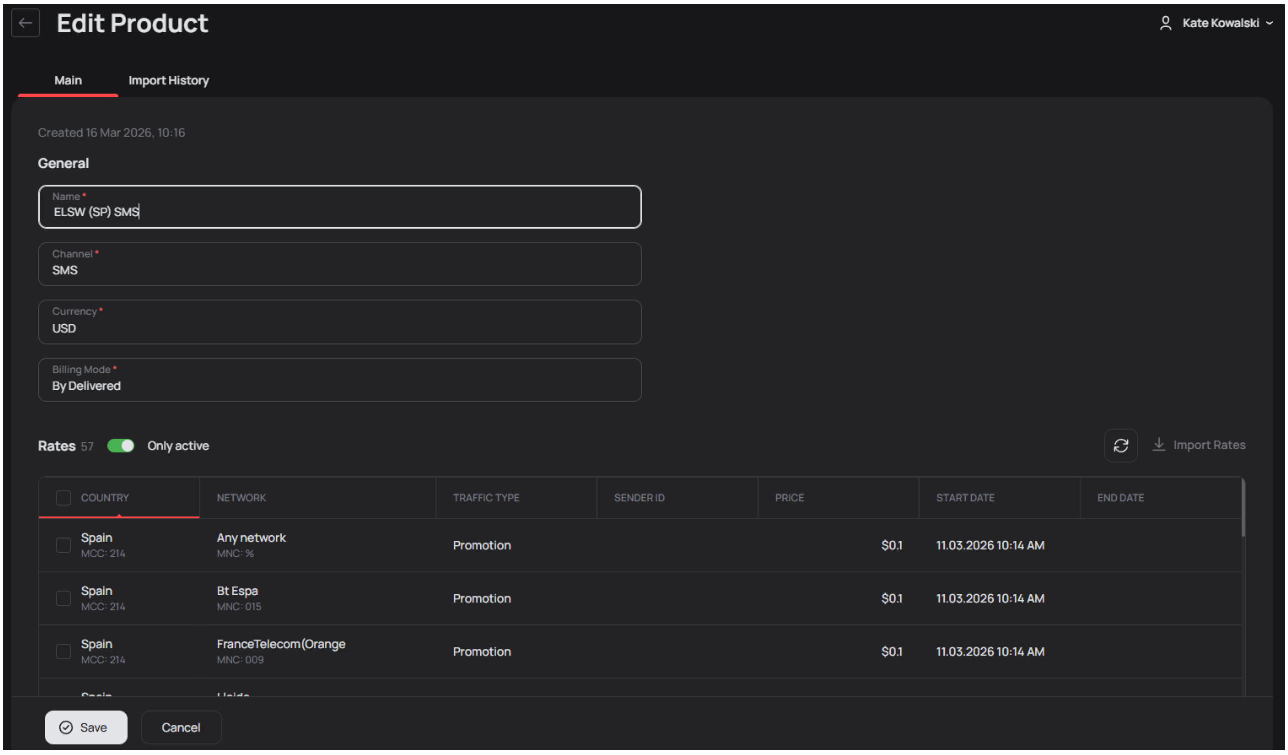
Once the import is complete, a table with the rates will be displayed. Click *Cancel* to cancel the action (before clicking *Create*) or to close the modal window.

The product editing window is divided into two tabs: *Main* and *Import History*.

The **Main** tab contains the main product parameters.

- The layout of the window is similar to the product creation window.

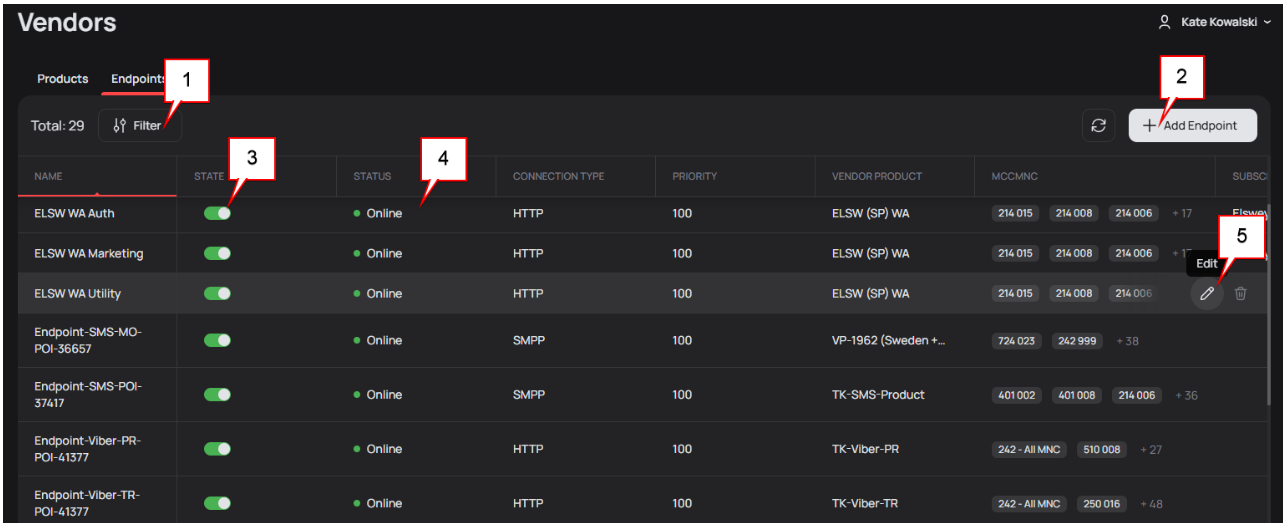
- Only the product name can be changed.
- At the bottom of the window, a table with the rates linked to the product is displayed:



Edit Product

Rate editing in a product is the same as for client subscriptions 43.

11.2 Endpoints



Vendor > Endpoints

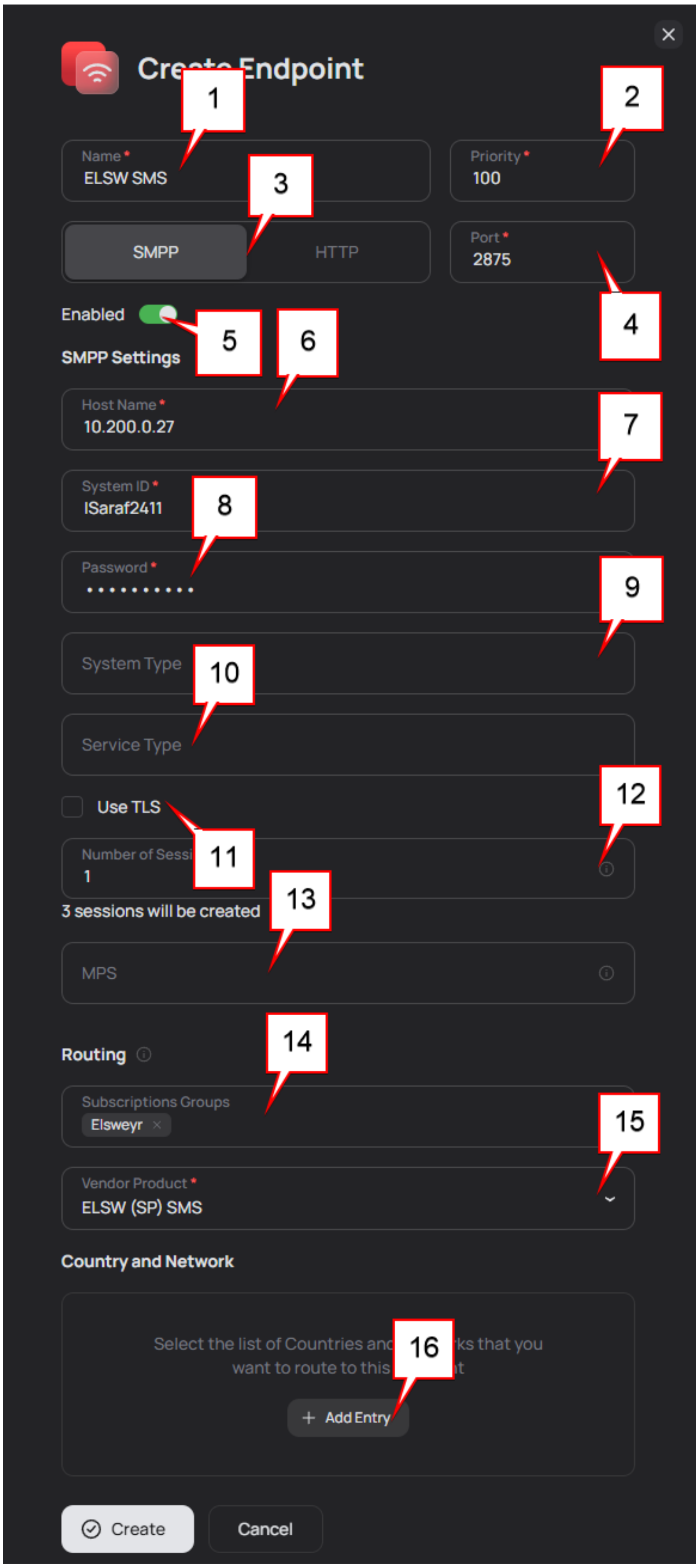
You can:

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. See below for more detail.

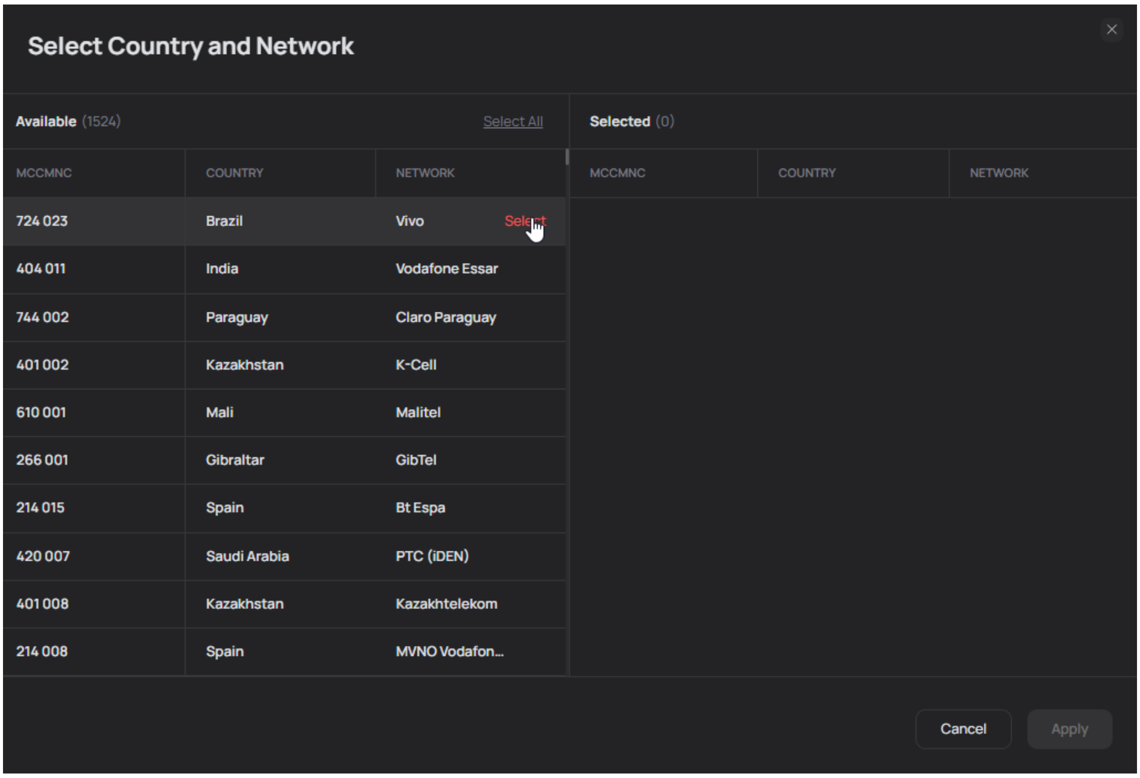
11.2.1 SMPP



Create Endpoint (SMPP)

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

1. Specify the name of the endpoint.
2. Specify the priority (from 1 to 100).
3. Select *SMPP* as the connection type.
4. Specify the port number used to connect to the SMPP server (up to 5 digits).
5. Enable (or disable) the endpoint.
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. Enable or disable TLS connection.
12. Specify the number of sessions.
13. If necessary, specify MPS - the number of messages sent per second.
14. If necessary, specify the group of client subscriptions that will be routed to this endpoint.
15. Select the vendor product.
16. Add a list of countries and networks to be routed to this Endpoint by clicking the *Add Entry* button. In the *Select Country and Network* window that opens, click *Select*.



Select Country and Network (Select)

To delete a record click *Delete*.

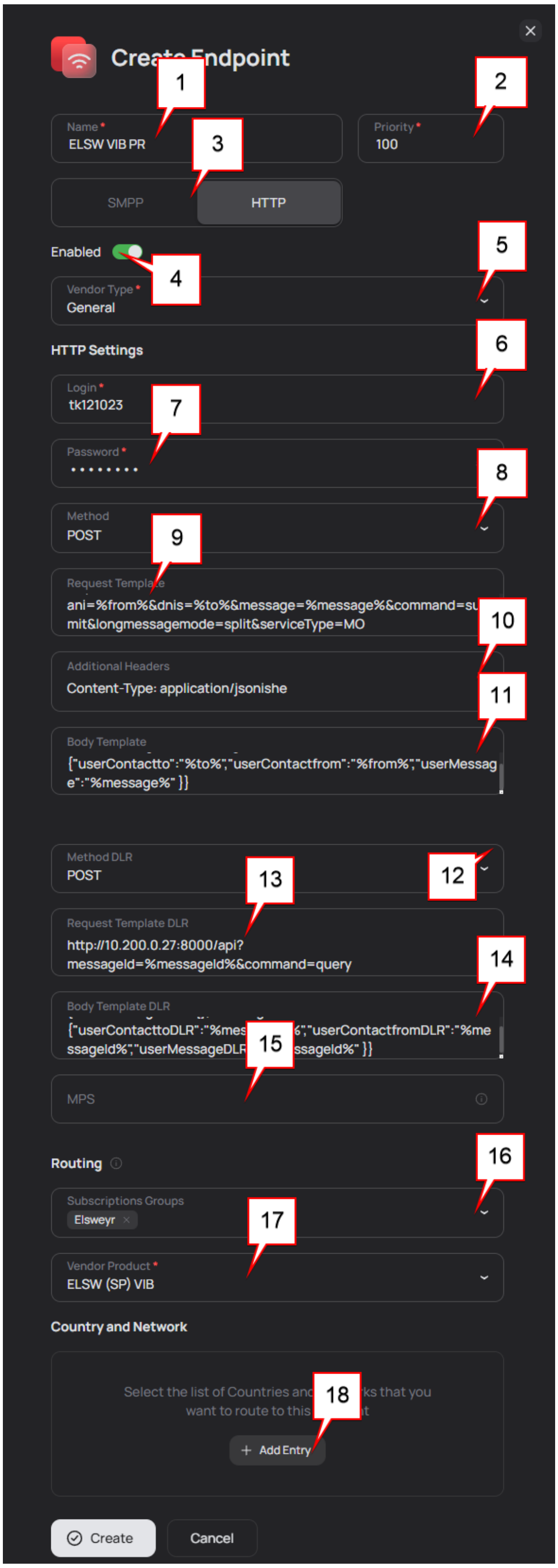
Select Country and Network (Delete)

To save the country and network selection 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.

11.2.2 HTTP

11.2.2.1 Viber (General)



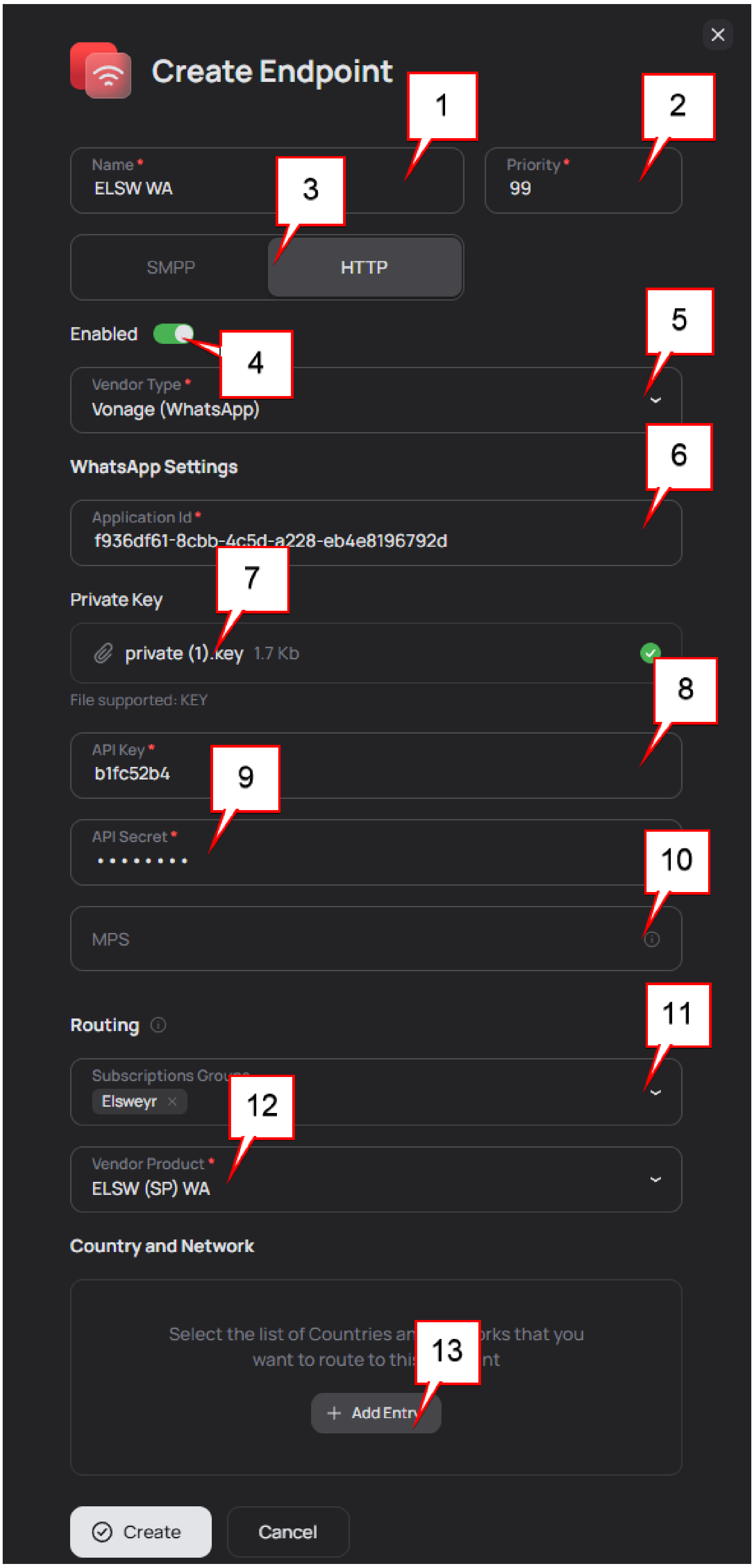
Create Endpoint HTTP (Viber)

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

1. Specify the name of the endpoint.
2. Specify the priority (from 1 to 100).
3. Select HTTP as the connection type.
4. Enable (or disable) the endpoint.
5. Specify the vendor type as *General*.
6. Specify the login used to send HTTP requests as Basic authorization.
7. Specify the password used to authenticate the user or client when sending HTTP requests to the secure endpoint.
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 as a URL.
10. If necessary, specify additional HTTP headers to be added to the request. They can include headers for authentication, content type, and other required parameters.
11. 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.
12. If necessary, specify the type of HTTP request method used to request the delivery status (Delivery Report). It indicates the method (GET or POST) that will be used to obtain delivery reports. It usually coincides with the method for a regular request, but it may also differ.
13. If necessary, specify a template for generating the URL request for the message delivery status. It defines the format and structure of the request for obtaining information about the message delivery status. The template must include markers to be replaced with actual values. To specify the URL template, the host and port combination for HTTP is not required; it is simply specified in the URL format.
14. If necessary, specify a template for generating the body of a message delivery status request in JSON format. The template is ued in POST requests to send data related to delivery reports. It must include markers to be replaced with actual values.
15. If necessary, specify MPS - the number of messages sent per second.
16. If necessary, specify the group of client subscriptions that will be routed to this endpoint.
17. Select the vendor product.
18. 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.

11.2.2.2 WhatsApp (Vonage)



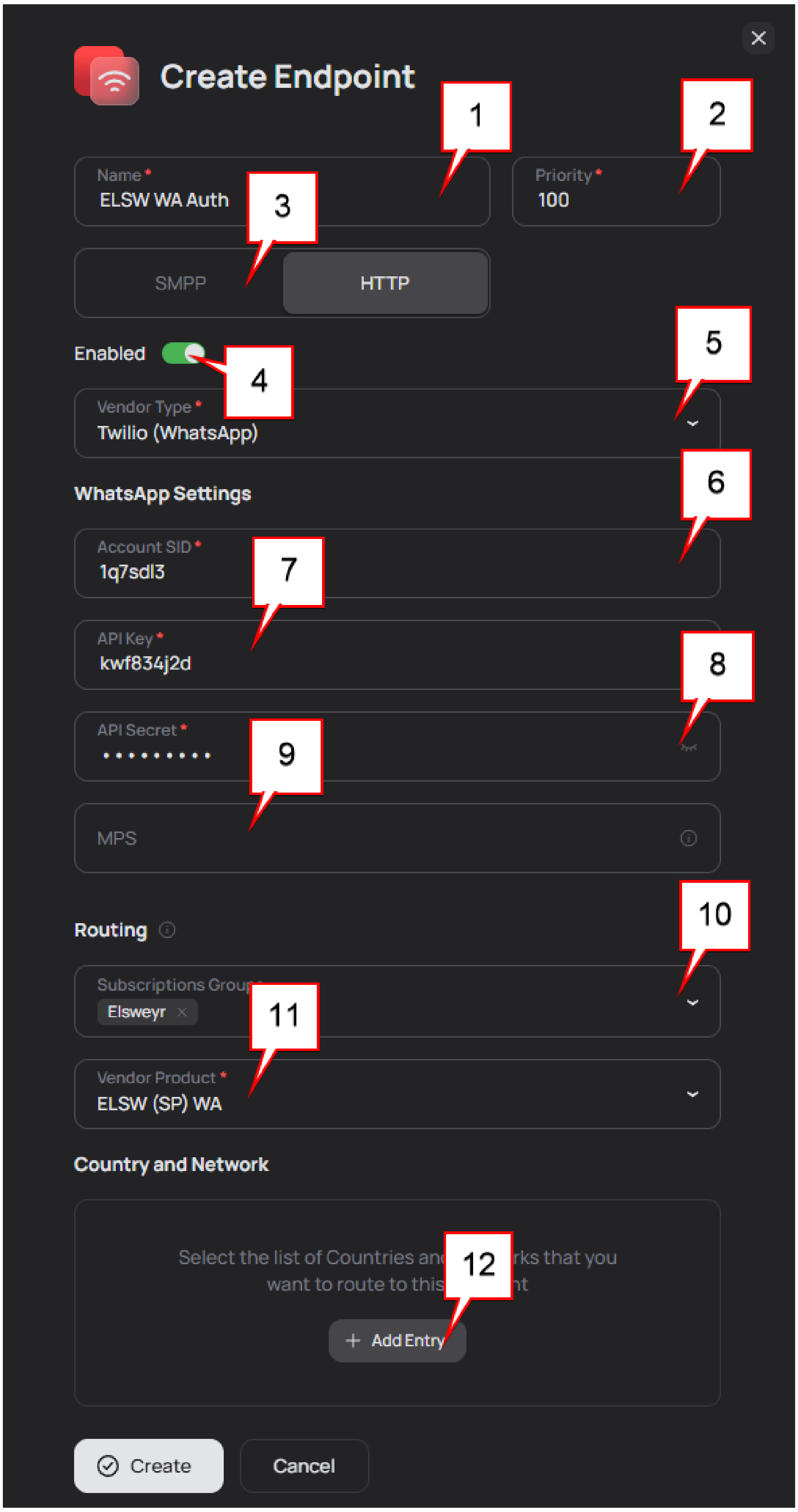
Create Endpoint HTTP (Vonage)

To add a new HTTP (BSP Vonage) endpoint, fill in the following parameters:

1. Enter the endpoint name.
2. Specify the priority (1 to 100).
3. Select the HTTP connection type.
4. Enable or disable the endpoint.
5. Select the vendor type: *Vonage*.
6. Enter the Vonage application ID used for JWT authentication.
7. Upload the key used for signing JWT tokens.
8. Enter the primary key for API authentication.
9. Enter the secret used together with the API Key for basic authentication.
10. If necessary, specify the number of messages sent per second.
11. If necessary, specify the client subscription group to be routed to this endpoint.
12. Select the vendor product.
13. Add the list of countries and networks to be routed to this endpoint by clicking the *Add Entry* button. The country and network selection window is the same as for SMPP 65.

After filling in the parameters, click *Create*. The System verifies endpoint name uniqueness: duplicate names are not allowed. Click *Cancel* to discard the changes.

11.2.2.3 WhatsApp (Twilio)



Create Endpoint HTTP (Twilio)

To add a new HTTP (BSP Twilio) endpoint, fill in the following parameters:

1. Enter the endpoint name.

2. Specify the priority (1 to 100).
3. Select the HTTP connection type.
4. Enable or disable the endpoint.
5. Select the vendor type: *Twilio*.
6. Enter the Twilio account Sender ID for local testing.
7. Enter the primary key for API authentication.
8. Enter the secret used together with the API Key for basic authentication.
9. If necessary, specify the number of messages sent per second.
10. If necessary, specify the client subscription group to be routed to this endpoint.
11. Select the vendor product.
12. Add the list of countries and networks to be routed to this endpoint by clicking the *Add Entry* button. The country and network selection window is the same as for SMPP 65.

After filling in the parameters, click *Create*. The System verifies endpoint name uniqueness: duplicate names are not allowed. Click *Cancel* to discard the changes.

12 Pre-moderation

The interface is designed for reviewing and controlling the content of messages sent through the Campaign Portal web application.

About the pre-moderation process:

Pre-moderation is required to ensure that Campaign Portal users can only send text in their campaigns that has been pre-approved by a higher-level partner. This ensures that messages comply with the established rules and prevents unwanted content.

Pre-moderation setup:

The process logic is determined by the partner settings in the Partners 37 interface under *Options* > *Pre-Approval*:

- **If both options (campaign and templates pre-approval) are disabled**: messages and templates are sent without approval (except for WhatsApp, where templates are always moderated).
- **If both checkboxes are enabled**: a campaign can be launched using a previously pre-approved template, or a new template or campaign can be submitted for moderation.
- ***Pre-Approval > Templates***: a campaign can only be launched using pre-approved templates.
- ***Campaign Pre-Approval***: every campaign (SMS/Viber) must be approved by a higher-level partner.
    - For WhatsApp, templates are approved rather than campaigns.
    - In case of a cascade campaign:
        - When creating a campaign, the System determines which of the selected channels require pre-moderation (according to the *Pre-Approval* checkbox settings).
        - If at least one of the selected channels requires pre-moderation, a single pre-moderation request is created for the entire campaign.
        - The request includes all campaign channels, including those that do not require pre-moderation.

Moderation request processing:

The message processing workflow consists of two main stages:

1. **Automatic reference book check** — after a template or campaign is saved by the client, a request is created and checked against the Blocked Phrases 77 reference book. The check is performed by comparing the request text with each term in the reference book:
    - If a match is found:
        - The end user's request is automatically declined; no request is created in the Requests 75 tab.
        - The template or campaign receives the pre-moderation status *Declined*, and the *Decline Reason* parameter displays *"Declined due to the presence of prohibited phrases"*.
        - After the request is blocked, the client can make the necessary changes to the template or campaign and resubmit it for approval.

- Only after a successful check against the *Blocked Phrases* reference book will the request be created in the *Requests* tab for approval by higher-level partners.

2. **Manual moderation** — after a request is created in the Requests 75 tab, the higher-level partner must decide whether to approve or decline it:
   - If the request is approved:
     - The campaign can be launched.
     - The template becomes available when creating a campaign.
   - If the request is declined:
     - The template or campaign receives the pre-moderation status *Declined*, and the *Decline Reason* parameter displays the reason provided by the higher-level partner.
     - After the request is blocked, the client can also make the necessary changes to the template or campaign and resubmit it for approval. In this case:
       - The request is no longer checked against the Blocked Phrases 77 reference book, but is created directly in the *Pre-Moderation* interface.
       - The higher-level partner must make a decision again, and this continues until the request is approved or the template or campaign is deleted or canceled by the client.

The interface consists of two tabs:

- Requests 75 — a list of Campaign Portal user requests for approval of templates and campaigns by their higher-level partner.
- Blocked Phrases 77 — a reference book of prohibited terms maintained by the System owner.

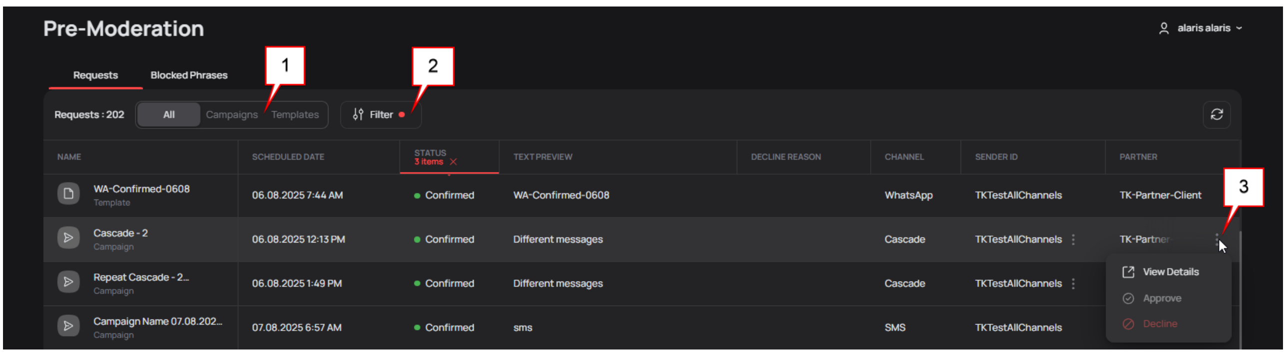
12.1 Requests

The tab contains all requests for moderation of campaigns and templates.

Requests are sorted by *Scheduled Date* and status. High-priority requests are always at the top of the list, followed by requests with the status *New*, and then those with the status *Repeat*.

The following priority values are available:

- *High*: requests with the nearest scheduled start date (within 24 hours). They are located at the top (both new and recurring), and the *Scheduled Date* column is highlighted in red.
- *Medium*: requests with a scheduled start date within 1–7 days.
- *Low*: requests with a scheduled start date over 7 days.



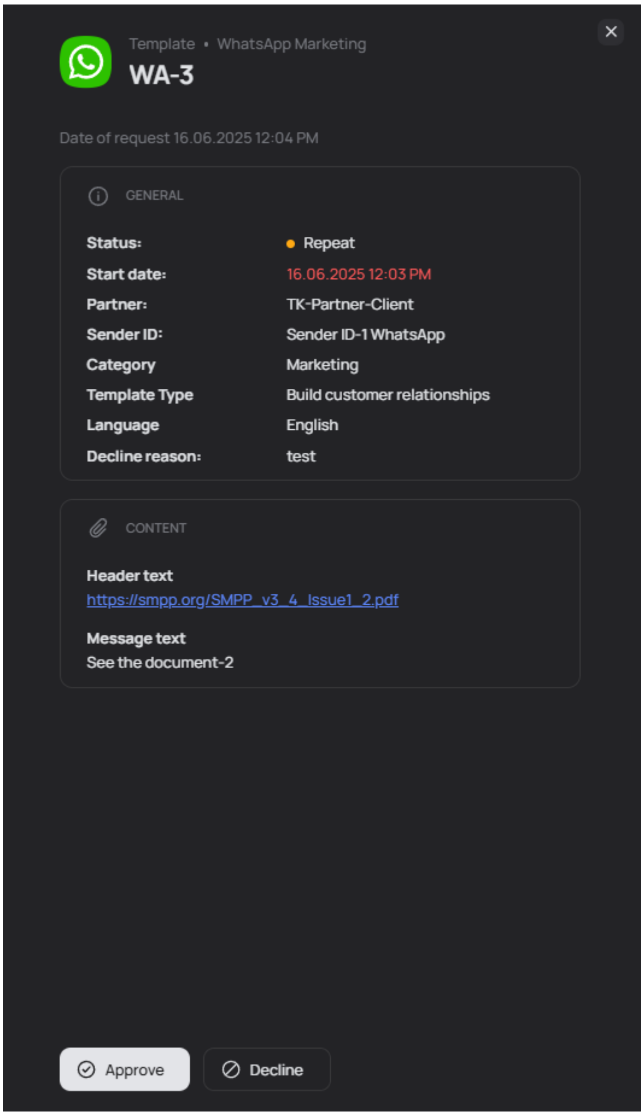
Pre-Moderation > Requests

The *Requests* tab allows the user to:

1. Use a quick filter by request type (campaigns or templates).
2. Use the filter to display relevant entries by clicking the *Filter* button. Filtering is available for all values.
3. Approve or reject applications. Hover the mouse over the desired entry and select the required action.

NOTE: The final decision is made by the System owner (similar to the Sender IDs approval procedure).

To open detailed information about an application, double-click on any entry:



Pre-Moderation > Requests > Details

The window displays type of request, its status, delivery channel, campaign or template name, and date of receipt. The message content is also displayed.

Click the *Approve* button to approve the request. To reject the request, click the *Decline* button and specify the reason for rejection.

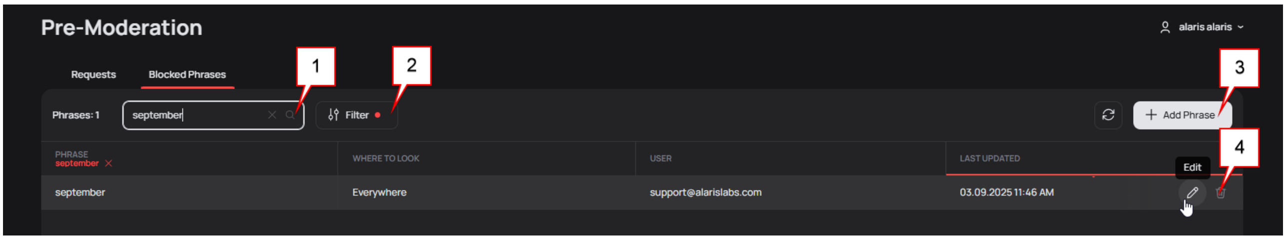
NOTE: The specified reason for rejection will be displayed to the client in the template or campaign in the *Reason for decline* parameter.

NOTE: Please note that when transferring a WhatsApp template to the BSP system, you must use the {{N}} placeholder in the short link button instead of the domain marker, where N is equal to the maximum number of parameters already used in the template plus one. This ensures that the BSP system correctly substitutes the generated short link when sending a campaign, preserving the parameter numbering order and ensuring that the link works correctly with the template.

12.2 Blocked Phrases

The *Blocked Phrases* reference book is a database in which the System Owner can store a list of words or phrases that are considered undesirable for use in campaign texts or templates.

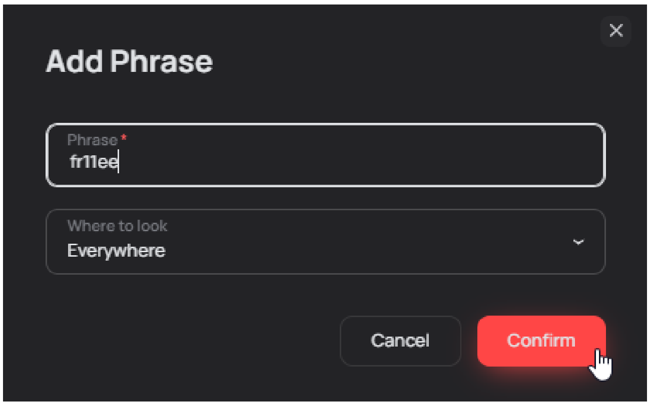
The reference book can contain not only individual words, but also entire phrases. This is necessary in order to block not only single terms, but also more complex expressions that may be undesirable in the text.



Pre-Moderation > Blocked Phrases

The user can:

1. Search for words or phrases in the reference book.
2. Use the filter to display relevant entries by clicking on the *Filter* button. Filtering is available for all values.
3. Add new words or phrases.
4. Edit or delete prohibited words or phrases. To do this, hover over the desired entry and select the appropriate action.



Add Phrase

To add a new prohibited phrase:

1. Specify a word or phrase that will be prohibited in messages.
2. Specify where the check must take place (in the button, in the text, or everywhere).

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

13 Finance

The *Finance* interface is designed for monitoring payments and transactions used as the basis for balance reconciliation over a billing period.

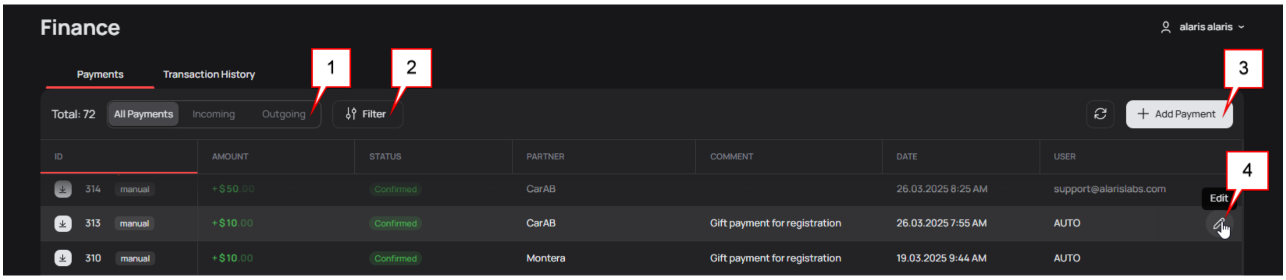
Payments can be:

- **Manual** — created by a higher-level partner for a lower-level one:
  - To increase a partner's balance, the higher-level partner must manually enter a payment with a + sign.
  - To decrease a partner's balance, the higher-level partner must manually enter a payment with a – sign.
- **Automatic** — processed through payment systems created in the Payment Systems 120 interface.

The interface consists of two tabs:

- Payments 78 — a table listing all incoming and outgoing payments by partner.
- Transaction History 80 — a table with the history of balance changes within the portal (campaign sending, pack purchases, balance top-up by a client through a payment system such as PayPal or Stripe, manual balance top-up of lower-level partners by a higher-level one, and "gift" credits awarded upon self-registration).

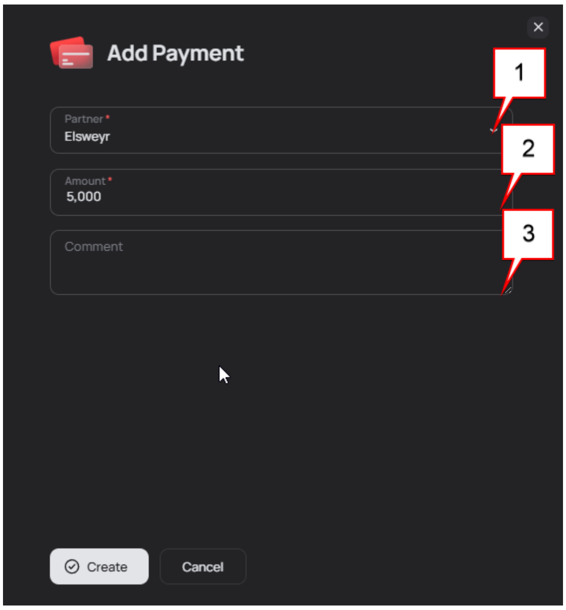
13.1 Payments



Finance > Payments

You can:

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

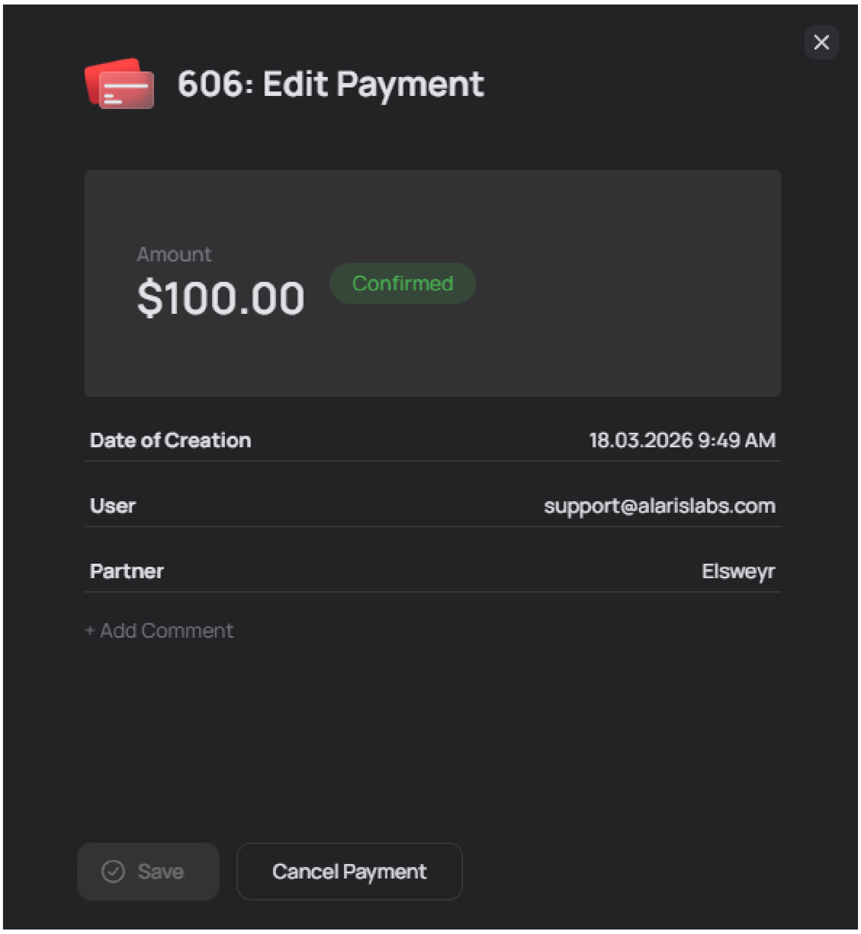


Add Payment

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.



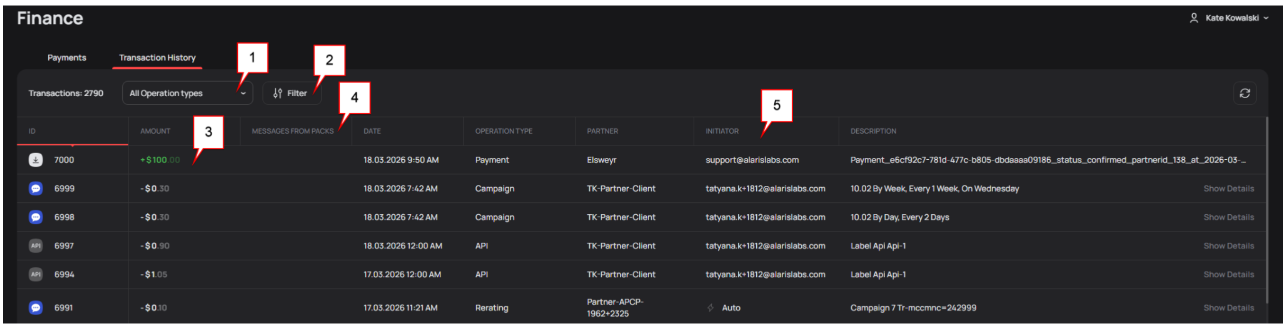
Edit payment

When editing payments you 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.

13.2 Transaction History

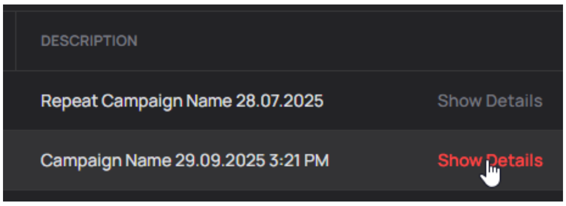


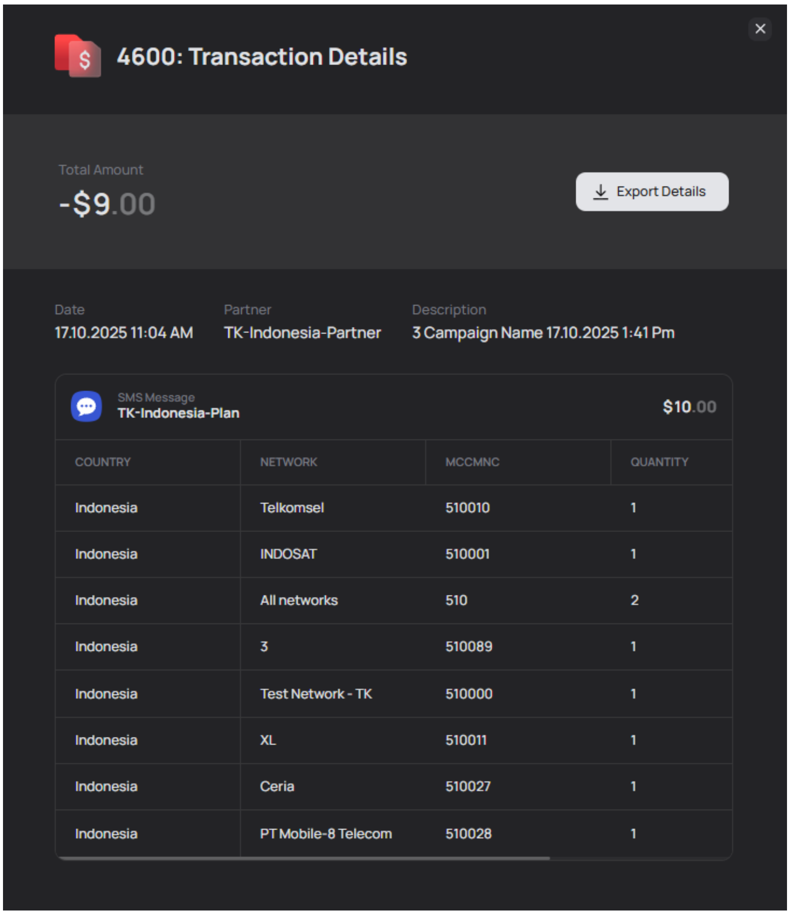
Finance > Transaction History

The user can:

1. Use a quick filter by operation type:
    - *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).
    - *Auto-Reply*: charged when sending automatic responses to MO messages (with the "-" sign). Transactions are grouped by delivery channel.
    - *Rerating*: change in balance as a result of campaign recalculation related to rate changes (can be either with the "-" or "+" sign). Transactions are grouped by adjustment for each affected campaign.
2. Use the general filter to display relevant records.
3. View the transaction amount.
4. View the number of messages sent from packs (displayed when a campaign is fully or partially covered by a pack).
5. View the user who created the adjustment or performed the operation.

For transactions with the operation type *Reply to MO*, *Campaign*, *API*, or *Rerating*, you can view detailed information by clicking the *Show Details* button.





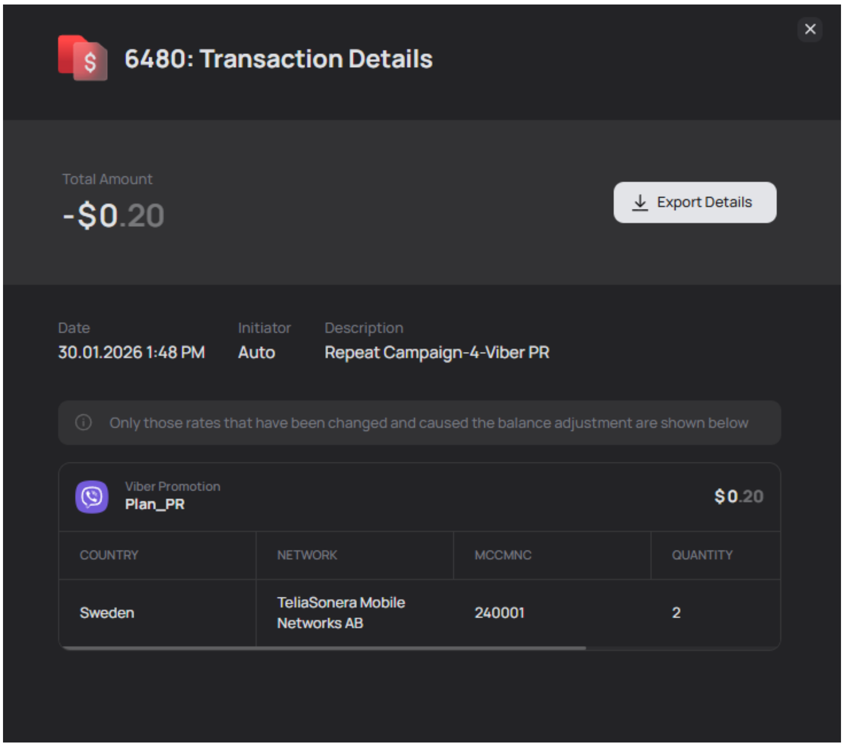
COUNTRY	NETWORK	MCCMNC	QUANTITY
Indonesia	Telkomsel	510010	1
Indonesia	INDOSAT	510001	1
Indonesia	All networks	510	2
Indonesia	3	510089	1
Indonesia	Test Network - TK	510000	1
Indonesia	XL	510011	1
Indonesia	Ceria	510027	1
Indonesia	PT Mobile-8 Telecom	510028	1

Finance > Transactions Details > Campaign

The details on the transaction of the *Campaign & API* type show:

- The country determined by the MCCMNC.
- The mobile operator network name according to the MCCMNC.
- The MCCMNC.
- The number of messages sent during the campaign.
- The rate for the given MCCMNC.
- The total cost of sending messages to the specific MCCMNC.

If a transaction has been affected by rate recalculation, it will be marked with the *Rerated* tag. The transaction amount remains unchanged.



Finance > Transactions Details > Rerating

The details on the transaction of the *Rerating* type show:

- The amount by which the partner's balance changed after the recalculation.
- The transaction creation date.
- The partner whose balance changed.
- The name of the campaign or API affected by the recalculation.
- A table with the rates that were changed and led to the balance adjustment.

14 Sender IDs

The *Sender IDs* interface is designed for managing sender names (Sender ID, SID).

Sender IDs are required by end-user companies that use Campaign Portal to launch campaigns. They allow recipients to unambiguously identify the sending company and facilitate further interaction with it, including outside the System.

The Sender ID approval process in Alaris Campaign Portal is a hierarchical approval procedure that begins with a user request and ends with the registration of the identifier with carriers or services.

Submitting a Sender ID request:

- End users submit requests through the *Campaign Portal > Campaigns > Sender IDs* web interface.
- Resellers submit requests through the Admin Panel > Sender ID list 85 web interface.

Approval:

- The request is passed up the reselling chain to the System owner.
- **The Reseller:**
    - Sees requests from lower-level partners in the Events 94 tab.
    - Verifies the accuracy of the data and:
        - If the data is incorrect, declines the request with a reason.
        - If the data is correct, confirms the request. At this point, a new request is automatically created on behalf of the Reseller to the System owner.
- **The System owner:**
    - Sees requests from lower-level partners in the Events 94 tab.
    - Makes the final registration decision.
    - Can set the request to *Put in Progress* status while handling the registration with the carrier.
    - For WhatsApp, manually registers the Sender ID with the business solution provider (BSP), waits for approval from Meta, and only then confirms the request in the System.

Process completion:

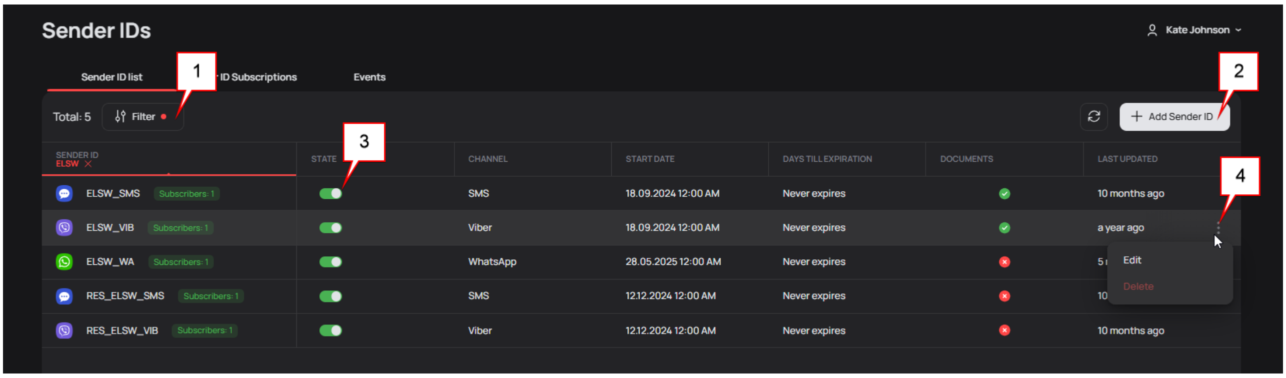
- **Approval (Confirm)**: after confirmation by the System owner, the Sender ID status changes to *Confirmed* throughout the chain, and the Sender ID becomes available for use in campaigns.
- **Decline**: if the System owner declines the request, it receives the *Declined* status for all parties in the chain. The decline reason is displayed to the user in the Sender ID details.
- **Cancellation (Cancel)**: the user can cancel their own request while it is in a pending approval status.

The interface consists of the following tabs:

- Sender ID list 85 — contains information about the current list of active and registered Sender IDs, allows creating new ones, monitoring usage of existing ones, and disabling unused ones.
- Sender ID Subscriptions 91 — allows linking Sender IDs to partners and also unlinking them.

- [Events](#) 94 — contains all Sender ID events that require action from the administrator, including Sender ID registration requests, unsubscription events, and subscription detail updates.

14.1 Sender ID list

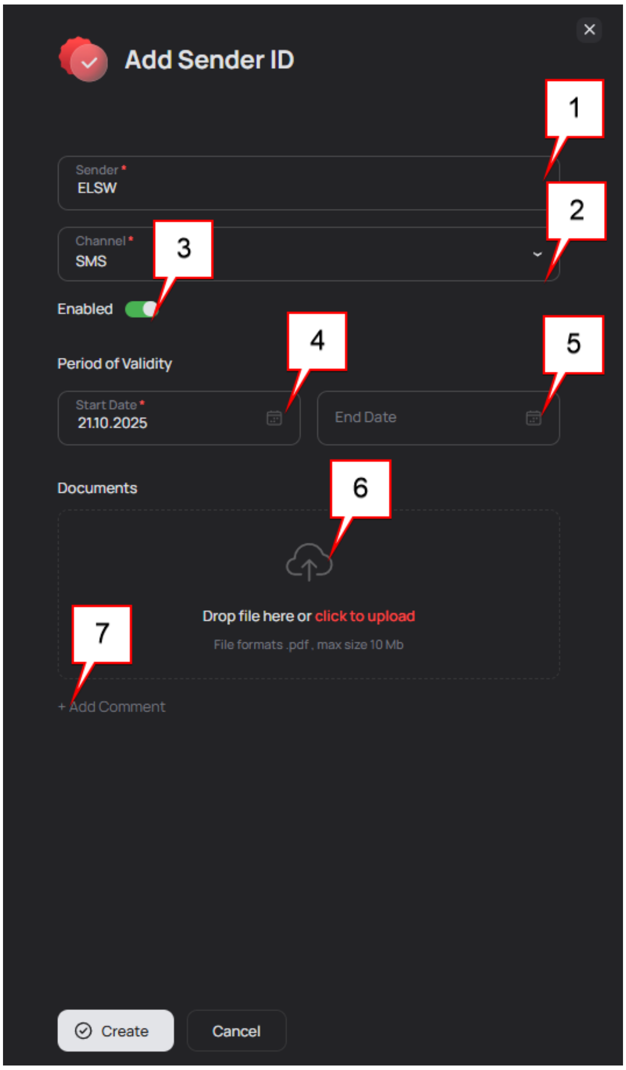


Sender ID list

You can:

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

14.1.1 System owner



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. Enable or disable the Sender ID.
4. Select the Sender ID start date.
5. Select the Sender ID start expiry date (if necessary).
6. Upload the documents required for registration.
7. 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 the list of attached documents.

If the System owner sets the toggle to *Disabled*:

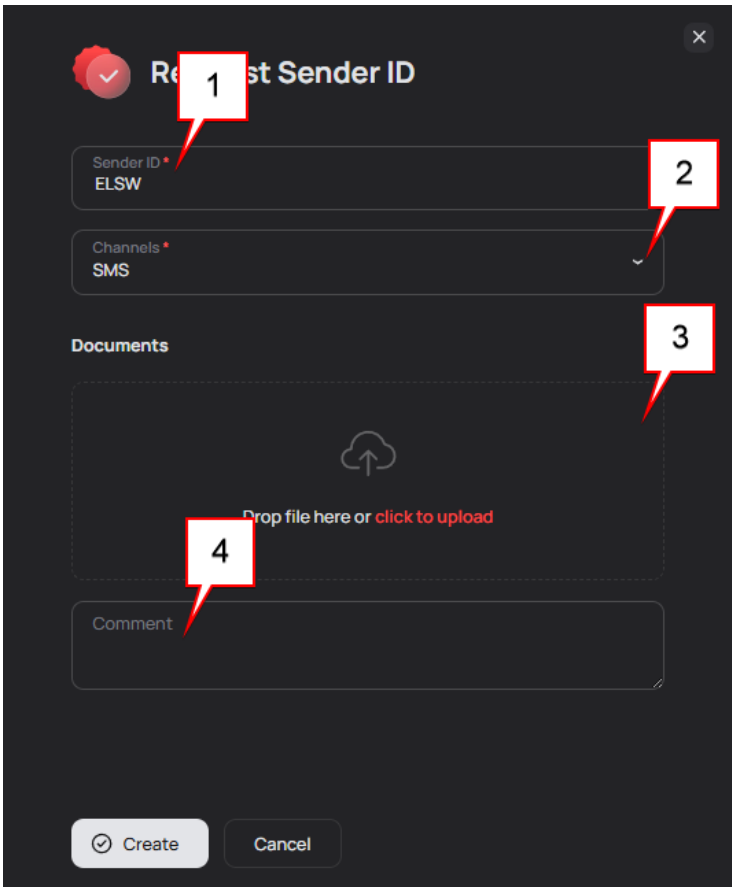
- The sender name in the Sender ID List[85] tab changes to *Disabled*.
- All subscriptions to this Sender ID in the Sender ID Subscriptions[91] tab are automatically set to *Disabled*.
- If there is a Reseller in the chain, the Sender ID in their Sender ID List[85] tab also becomes *Disabled*, and the toggle is locked — the Reseller cannot enable it independently. All subscriptions of their lower-level partners are also disabled.
- In Campaign Portal, the Sender ID status changes to *Disabled*, and it becomes unavailable for use in campaigns.

Only Sender IDs to which no partners have active subscriptions can be deleted.

14.1.2 Reseller

This tab displays all Sender IDs that were requested by the Reseller and their lower-level partners and subsequently approved by the System owner.

The Reseller can request Sender IDs from a higher-level partner by clicking the *Request Sender ID* button in the top right corner.



Request Sender ID

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

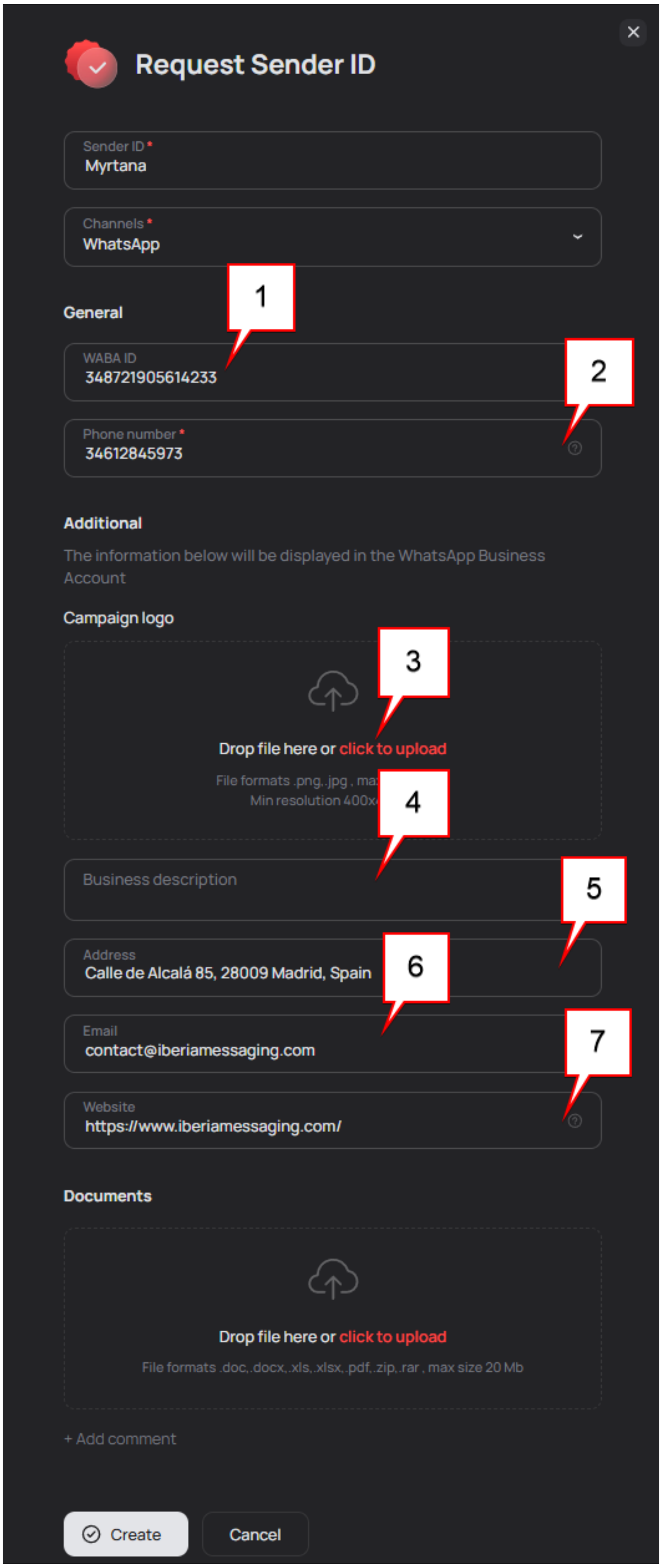
1. Specify the Sender ID.
2. Select the delivery channel (Viber / SMS / WhatsApp).

   a. You can select all delivery channels available to you, after which a separate registration request will be created for each of them.

   b. The WhatsApp channel has additional parameters (see below).

3. If necessary, enter an optional comment for the higher-level partner.

4. If necessary, upload legal documents for registering the new Sender ID. For example, if you already have an active Sender ID, provide supporting documents.



Request Sender ID (SMS, Viber)

The WhatsApp channel has additional parameters:

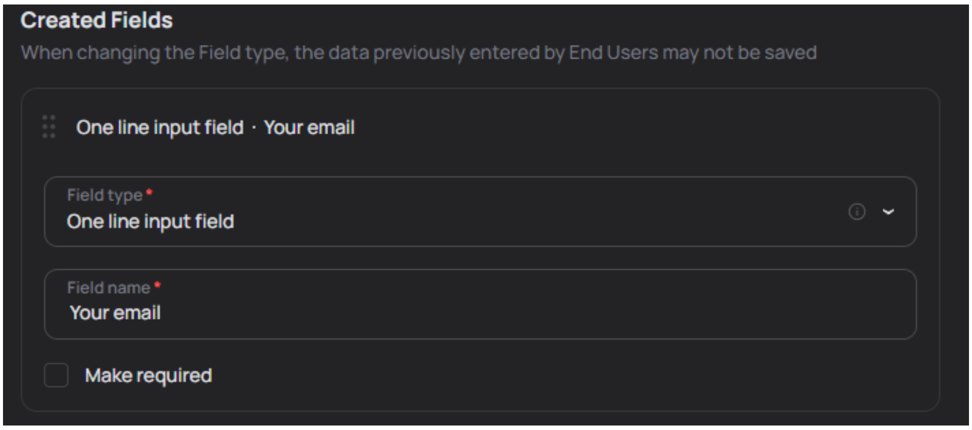
1. Specify the WABA ID of the account registered with Meta.
2. Specify the phone number to be used for WhatsApp registration.
3. If necessary, upload the company logo that WhatsApp users will see instead of the sender's avatar.
4. If necessary, describe the company's business activities.
5. If necessary, specify the company address.
6. If necessary, specify the company email address that will be displayed in the company's WhatsApp profile.
7. If necessary, specify the company website address.

After a Sender ID request is created, a new event for approving the Sender ID will appear in the Events 94 tab of the System owner or the higher-level Reseller.

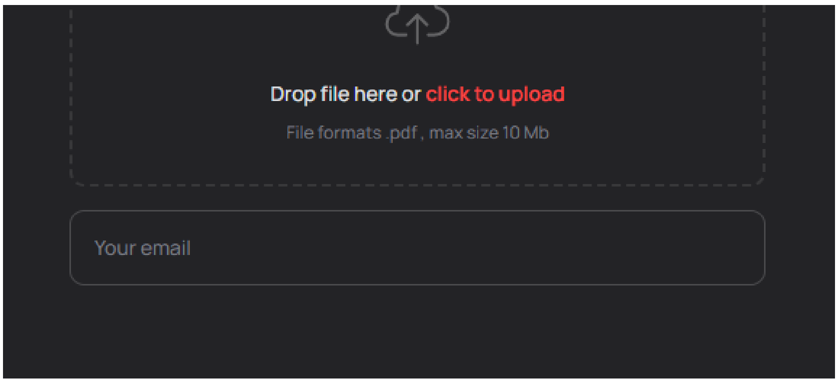
Once the Reseller's request is approved by the higher-level partner, the Sender ID will appear in their *Sender ID list* tab. The Reseller can then:

1. Enable or disable the Sender ID.
2. In the Sender ID Subscriptions 91 tab, create a subscription for their partner to this Sender ID.

NOTE: If a higher-level partner has added custom fields to the Sender ID request form in the Form Customization 126 interface, these fields will appear when requesting a new Sender ID.

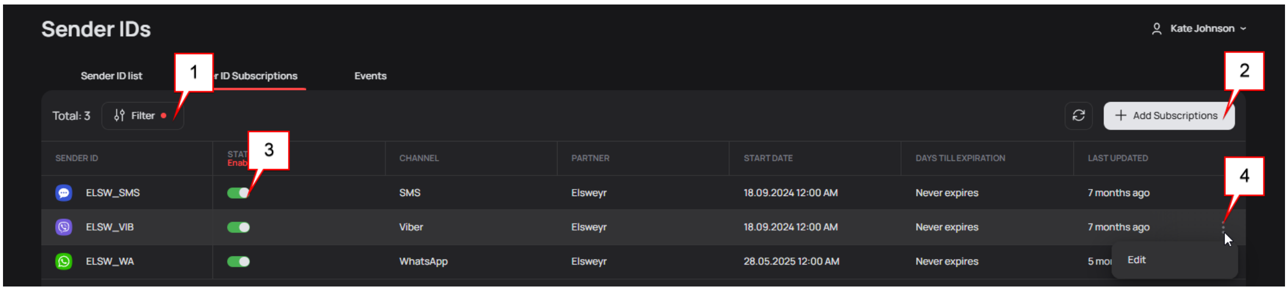


Form Customization > Request Sender ID Form



Request Sender ID

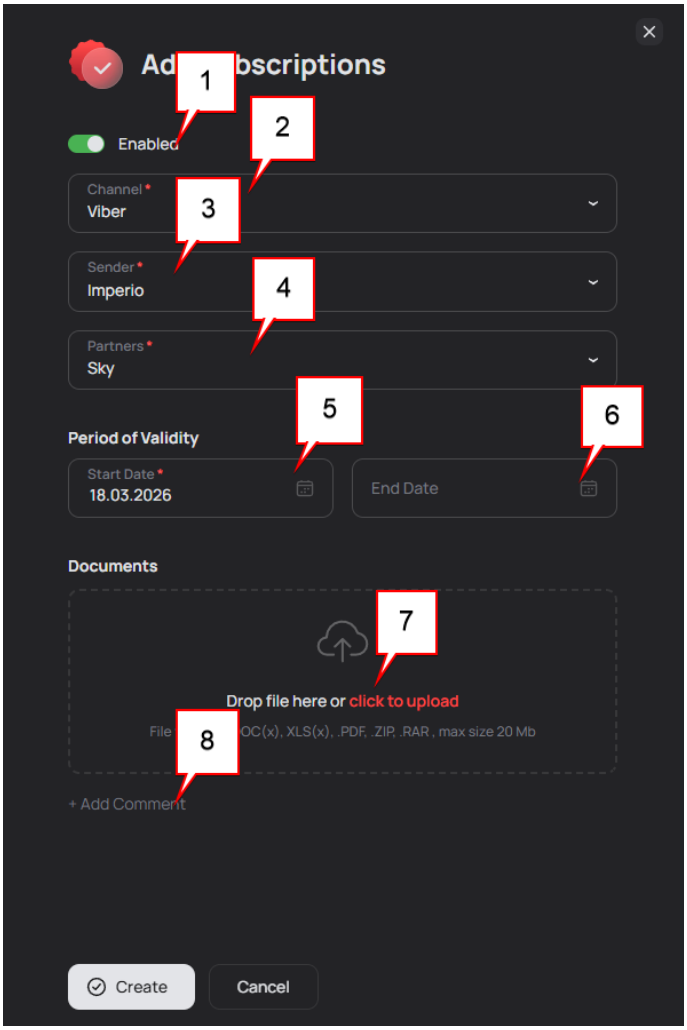
14.2 Sender ID Subscriptions



Sender ID Subscriptions

You can:

1. Use the filter to display relevant records.
2. Enable or disable a subscription.
3. Click the *Add Subscriptions* button in the top right corner to add a new Sender ID subscription for a partner.
4. Edit Sender ID subscriptions by clicking the context menu ⋮ and selecting the required action.



Add Subscriptions

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

1. Enable the subscription.
2. Select the delivery channel.
3. Select the Sender ID, filtered by the specified channel.
4. Select the partner.
5. Specify the subscription start date.
6. Specify the subscription end date.
7. If necessary, upload documents.
8. If necessary, add a comment.

For the WhatsApp channel, additional parameters are required:

- Required: *WABA ID*, *Phone Number*.
- Optional: company logo, business description, address, email, and website address.

After filling in the parameters, click *Create*. Click *Cancel* to discard the action.

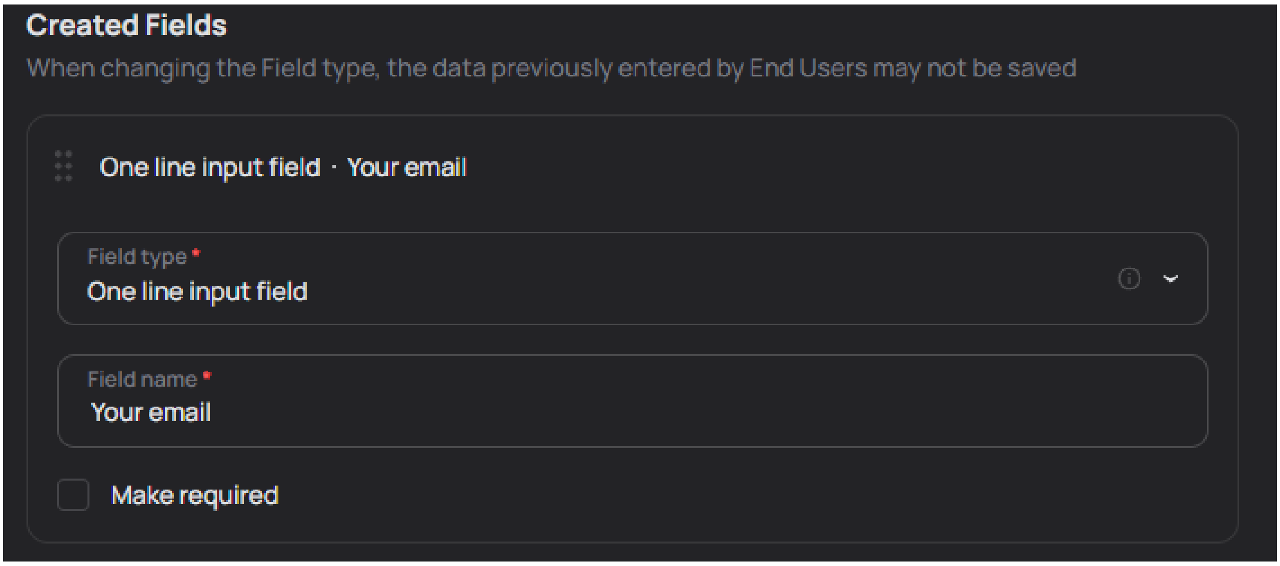
When editing a subscription, only the start date, end date, and status can be changed:

- **If the System owner disables a Sender ID subscription:**
  - The partner's subscription changes to *Disabled*.
  - If the partner is a Reseller, the Sender ID in their *Sender ID List* tab becomes *Disabled* and cannot be re-enabled, and all subscriptions of their lower-level partners are also disabled.
  - In Campaign Portal, the Sender ID status changes to *Disabled*, and it becomes unavailable for use.
  - The Sender ID itself in the *Sender ID List* tab remains *Enabled*.
- **If a Reseller disables a Sender ID subscription:**
  - The partner's subscription changes to *Disabled*.
  - Nothing changes for the System owner in Admin Panel.
  - In Campaign Portal, the Sender ID status changes to *Disabled*, and it becomes unavailable for use.
  - The Sender ID itself in the Sender ID List 85 tab remains *Enabled*.
- **If a client disables a Sender ID subscription:**
  - In Campaign Portal:
    - The Sender ID changes to *Disabled*.
    - To restore it, the user must submit a new request that will go through the full approval chain.
  - In Admin Panel:

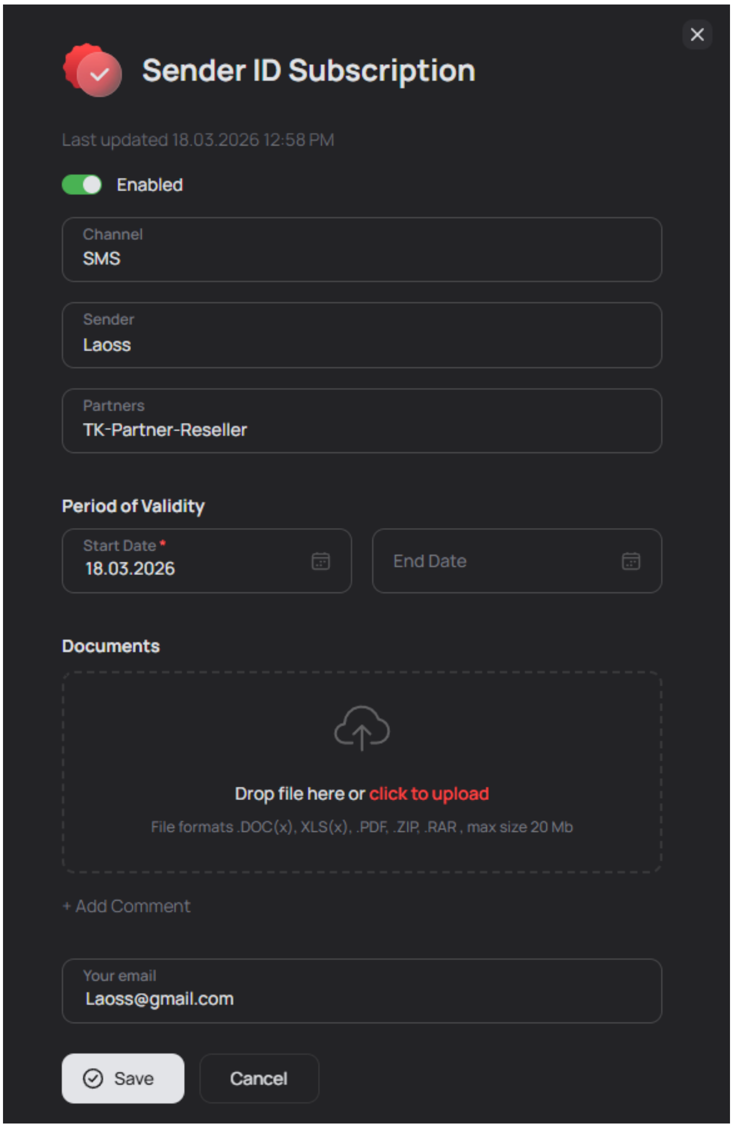
- An event with the *Unsubscribed* status is created in the Events [94] tab of the higher-level partner.
- The partner's subscription in Sender ID Subscriptions [91] changes to *Disabled*, and the toggle is locked (its state cannot be changed manually).

  - The Sender ID itself in the Sender ID List [85] tab remains *Enabled*.

NOTE: If a higher-level partner has added custom fields to the Sender ID request form in the Form Customization [126] interface, after the fields are filled in and the subscription is created, the data entered by the users will be displayed in the *Sender ID Subscription* window. For example:

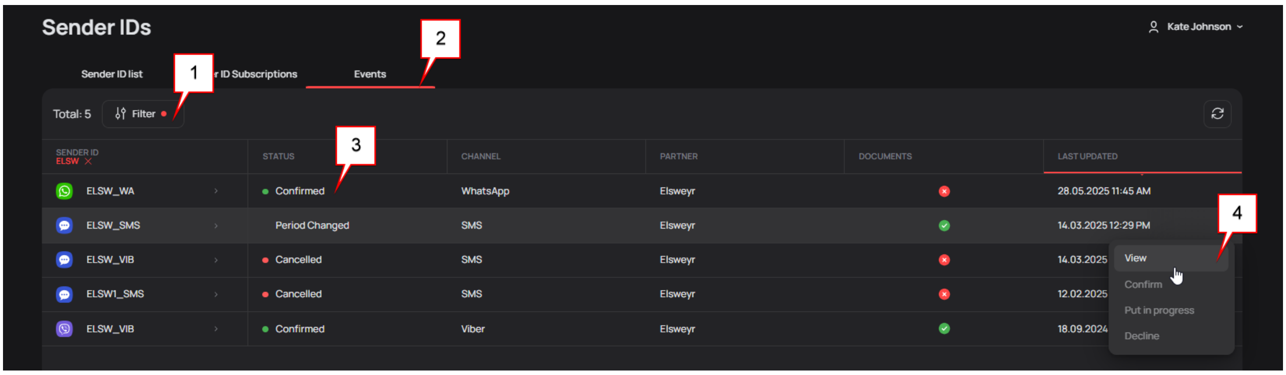


Form Customization > Request Sender ID Form



Subscription Details

14.3 Events



Events

You can:

1. Use a filter to display relevant records.

2. View the number of pending events (if any).
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 partner level and Sender ID request status.

For the System owner:

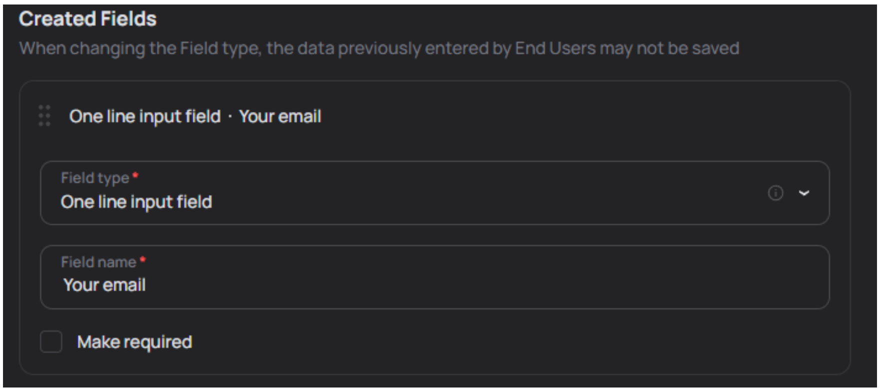
- *View*: view the Sender ID registration request.
    - Available for all statuses.
- *Confirm*: approval of the Sender ID registration request.
    - Available for the statuses *New* and *In Progress*.
    - The request changes its status to *Confirmed*.
- *Put in Progress*: the request is in progress.
    - Available for the status *New.*
    - The request changes its status to *In Progress*, from which the following actions are available to the System owner:
        - *Confirm*: confirming the Sender ID request. The status changes to *Confirmed*.
        - *Decline*: declining the Sender ID request. When selected, a window appears where you can enter a comment explaining the reason for the decline, which will be displayed to the Reseller or client. The status changes to *Declined*.
- *Decline*: the request for Sender ID registration has been declined.
    - Available for the statuses *New* and *In Progress*.

A Reseller can have two types of applications:

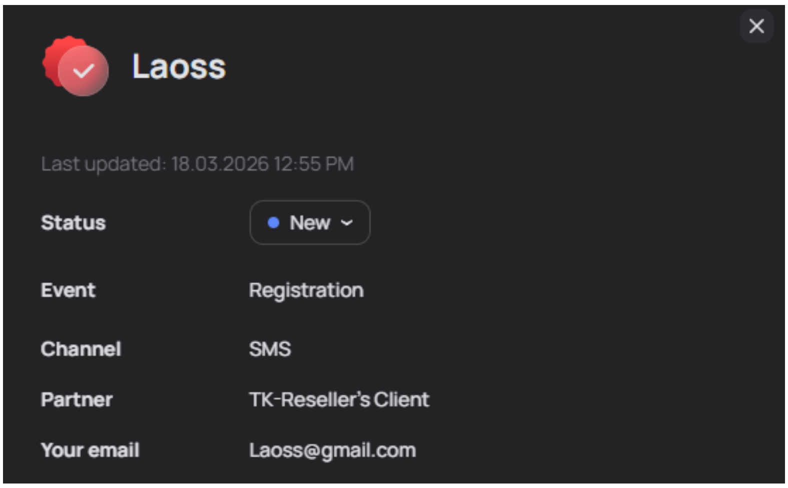
- *Partner Event*: a request from a client or lower-level Reseller. The following actions are available:
    - *View*: view the Sender ID request.
        - Available for all statuses.
    - *Confirm*: approve the Sender ID request.
        - Available for the statuses *New* and *In Progress*.
        - When selected, the request changes its status to *Confirmed* and a new request of the *My Events* 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 Sender ID.
    - *Decline*: denial of the Sender ID registration request.
        - Available for the statuses *New* and *In Progress*.
        - 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 Client that originated the request. The request changes its status to *Declined*.

- *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 Sender ID approval in the Sender ID list 85 tab, or if the Reseller has selected the *Confirm* action on a lower-level partner's request. The following actions are available:
  - *View*: view the Sender ID request.
    - Available for all statuses.
  - *Cancel*: cancel the Sender ID request by a higher-level partner.
    - Available for the status *New.*
    - The request changes its status to *Cancelled*.

NOTE: If a higher-level partner has created custom fields for the Sender ID request form in the Form Customization 126 interface, these fields filled by users will be displayed in the event window as illustrated below.



Form Customization > Request Sender ID Form



Events > Details

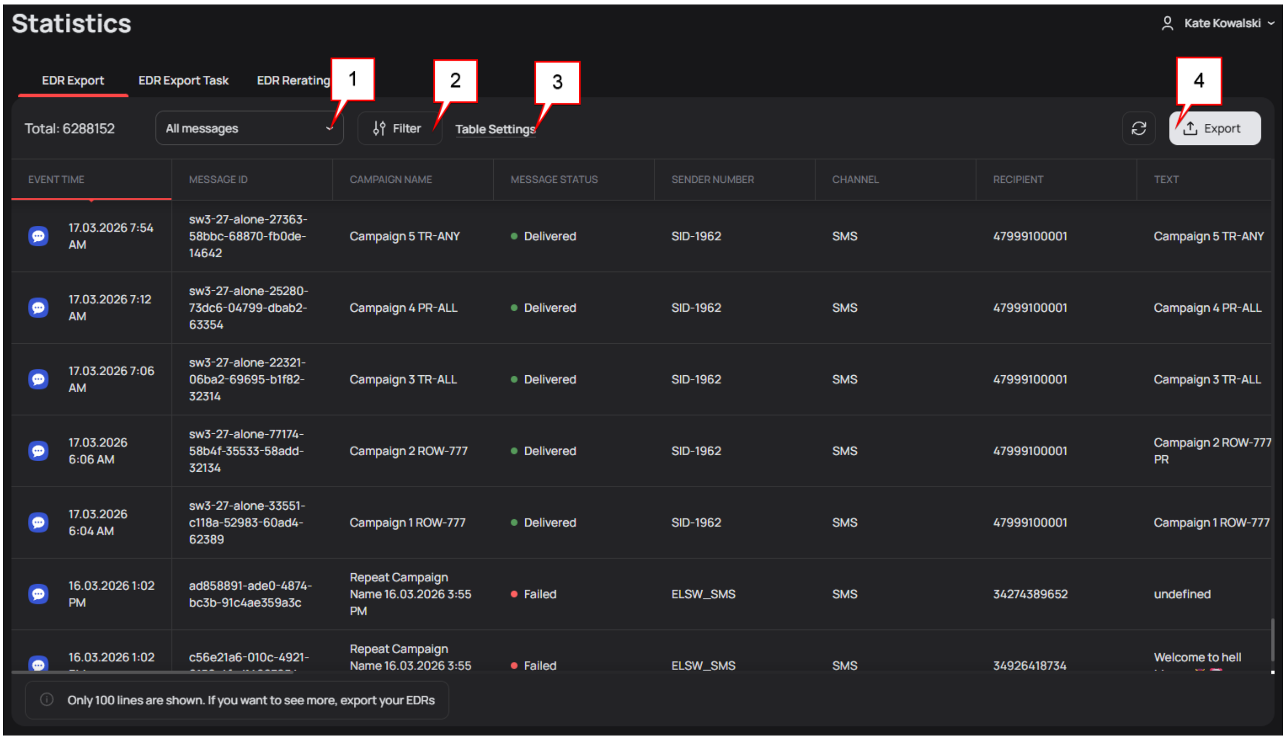
15 Statistics

The *Statistics* interface serves to manage EDR records: view event detail records (EDRs) and export them to a file. These records are necessary for reconciliation and retrospective analysis of traffic sent by a Campaign Portal user that passes through the System owner or Reseller.

The interface consists of 3 tabs:

- EDR Export 97: table with data on sent messages that were selected as a result of applying filtering parameters.
- EDR Export Task 100: table of EDR export tasks that were either sent to e-mail or exported to files that can be viewed and downloaded from the interface to a computer.
- EDR Rerating 101: table of EDR recalculation tasks.

15.1 EDR Export



EDR Export tab

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

The user can:

1. Use a quick filter by type of sent message (All, Campaign or API).
2. Use a filter to display relevant records by clicking the *Filter* button. Filtering is available for all values.
   a. Viewing filtered EDRs is available without any special action, that is, any filled-in fields are used to filter the table, which displays the corresponding EDRs.
3. Customize the display of the required columns by clicking *Table Settings* (details on customizing columns are described in the *Alaris Campaign Portal. User`s Guide* in the *Contacts interface* section).

4. Unload the required records by clicking the *Export* button. The file will contain the set of columns that was selected in the interface.

5. Open a window with detailed information on any EDR by double-clicking on any row.

EDR Export

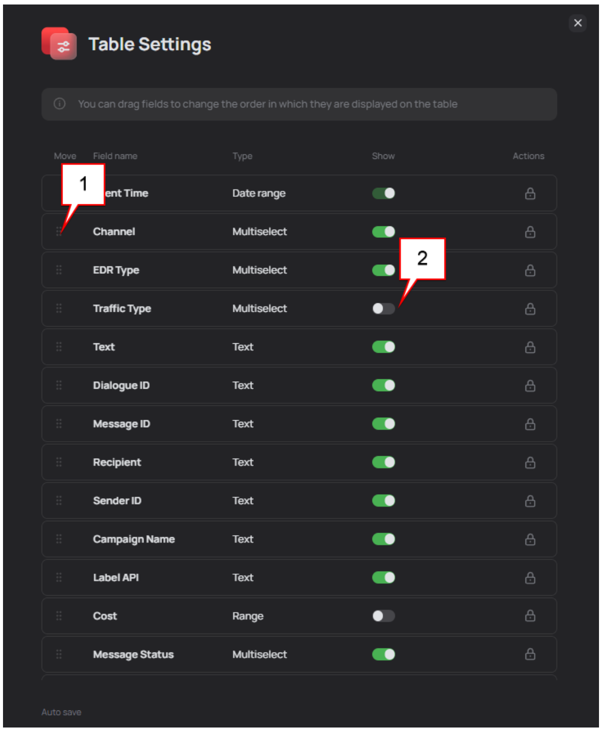
To export EDRs, in the window that appears, perform the following steps:

1. Check the number of EDRs that will be exported.

2. Select the required EDR fields for export.

3. Enter an email address if you want to email the file. You can enter several addresses separated by commas.
    a. 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.

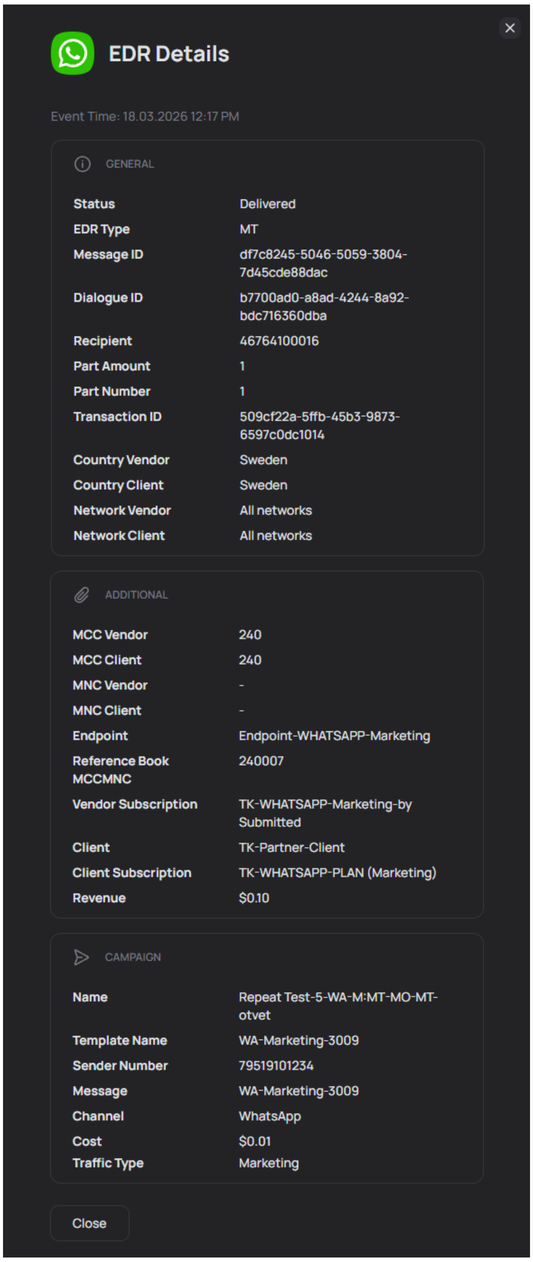
To start exporting, click the *Export* button. The *Cancel* button serves to cancel the action.



Statistics > Table Settings

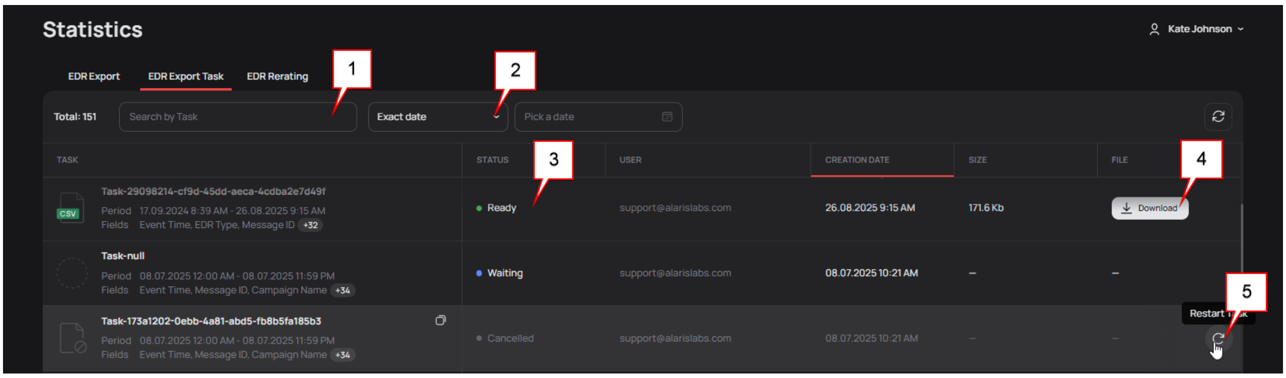
To change the order and display of columns in the window that appears:

1. Drag the columns to arrange them in the desired order.
2. Enable or disable the display of columns.



EDR Details

15.2 EDR Export Task

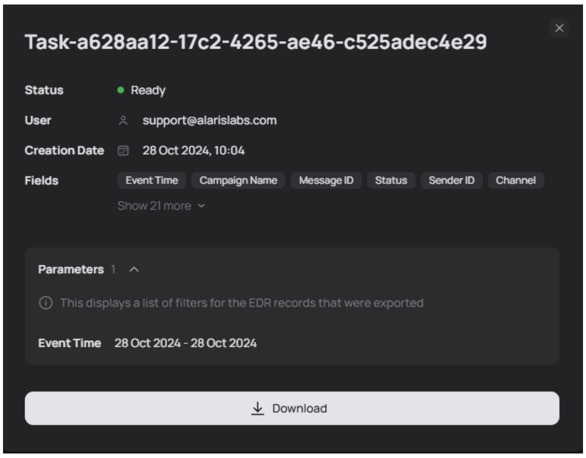


EDR Export task

The user can:

1. Locate the task.
2. Set up a filter by date to find the records you need.
3. 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 emailed.
    - *Cancelled*: the task is canceled by the user.
    - *Failed*: the file generation task is executed with errors.
4. Export the file with EDRs.
5. Cancel the task if it is in the *Waiting* status, or restart it.

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



15.3 EDR Rerating

EDR Rerating is the process of updating the value of already recorded events (EDR) based on new or adjusted rates. This feature is particularly important in cases where rates have been uploaded or changed retroactively and where it is necessary to ensure accurate accounting of income and expenses for past periods.

After rates are changed, two scenarios are available for triggering the Rerating mechanism, which recalculates the cost of all affected EDRs:

1. **Automatic**: after the System owner or Reseller uploads rates to a vendor product or client subscription using the Import Rates 53 interface, the System:
    - Automatically creates a recalculation task, determining:
        - Which rates were changed.
        - The change period (minimum and maximum date).
        - For all affected countries and networks within the corresponding subscription, the cost is recalculated for the specified period.
    - Adds the task to the table with the *New* status.

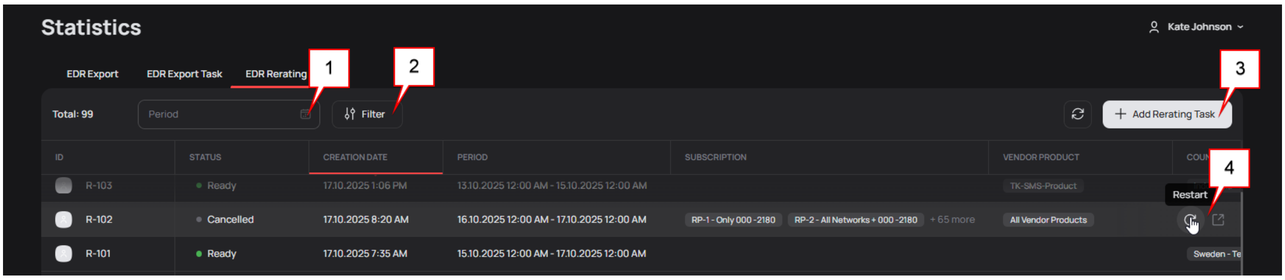
- The user can run it manually or wait for the automatic update.
- At 01:00 server time, the System automatically runs the task, after which it enters the queue and transitions to *In Progress* status.

2. **Manual**: after the System owner or Reseller manually modifies rates in a vendor product or client subscription, they must create an EDR recalculation task themselves in the *EDR Rerating* tab.
   - After the task is created, the System adds it to the table with the *Waiting* status.
     - While the task has *Waiting* status, the user can cancel it, after which it moves to *Cancelled* status.
   - The System then waits 5 minutes to allow the user to cancel if needed, after which the task enters the queue and transitions to *In Progress* status.

In either scenario, the System:

1. Identifies the EDR records subject to recalculation by matching the rate validity period with EDR timestamps:
   - It checks the validity period of each rate and finds all EDRs that fall within that period.
   - Matching is performed at the level of each individual event to ensure calculation accuracy. This includes checking for rate overlaps and adjusting the validity period of each rate in case of overlaps.
2. Applies the appropriate rate to each EDR based on the time of the operation, verifying that the rate is valid at the time the EDR was recorded.
3. Recalculates the cost of all affected EDR records using the new rates, including computing new revenues and expenses based on the updated rates, and applies the changes in the corresponding interfaces:
   - In Statistics > EDR Export 97 table:
     - Updates the EDR cost.
     - Specifies the *Last Rerating Date*.
   - In Finance > Transaction History 80:
     - Marks affected transactions with the *rerated* tag. The original transactions are not overwritten.
     - Creates an adjustment transaction of the *Rerating* type, reflecting the difference between the balance before and after the EDR recalculation. The transaction is NOT created if:
       - The recalculation task only affects vendor rates (*Vendor Cost*), since the System owner's balance is not displayed anywhere and there are no cost changes for clients.
       - Changes to client rates occurred within a campaign but the campaign cost and partner balance ultimately did not change.
4. Updates user balances and Dashboard data.

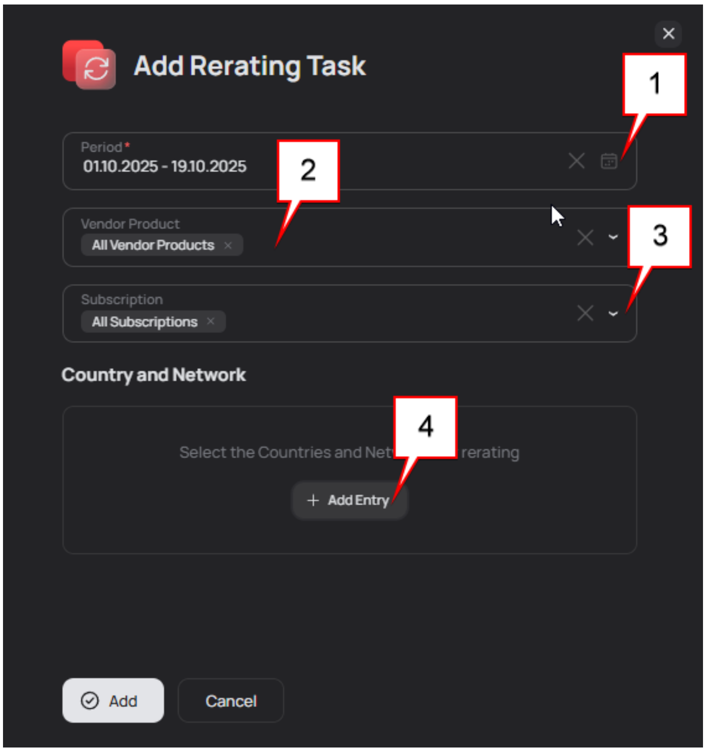
NOTE: Rates are not recalculated for MT messages sent free of charge under WhatsApp requirements (24-hour window for the same recipients and senders, as a reply to an MO message or a message of the *Utility* type).



EDR Rerating

You can:

1. Use the quick filter by recalculation period to filter records by the desired date.
2. Use the filter to display relevant entries by clicking on the *Filter* button. Filtering is available for all values.
3. Create a manual task for recalculation.
4. View task details or restart it if it was not completed successfully. Hover over the entry and select the required action in the left-hand column.



Add Rerating Task

To add a new EDR recalculation task, fill in the following parameters:

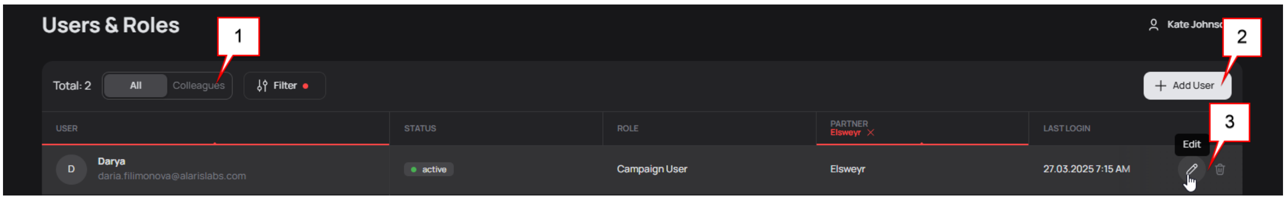
1. Indicate the period for which the EDRs must be recalculated.
2. Indicate the vendor products for which recalculation will be performed.
3. Indicate the customer subscriptions for which recalculation will be performed.
4. If necessary, specify countries and networks.

After filling in the parameters, click *Add*. Click *Cancel* to cancel the action.

16 Users&Roles

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

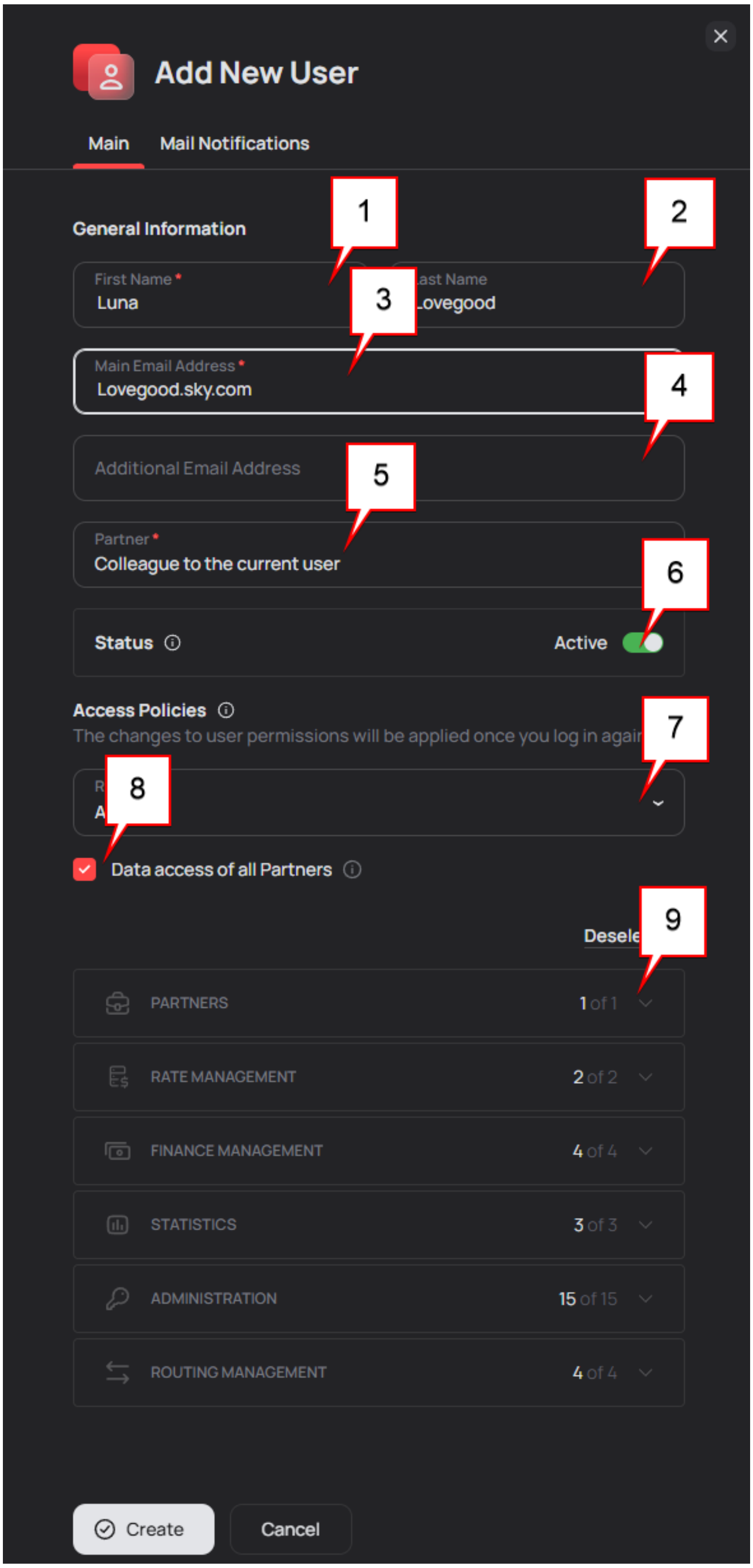
You can create users for both Admin Panel and Campaign Portal, so it is possible to manage both sets of roles and permissions.



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.



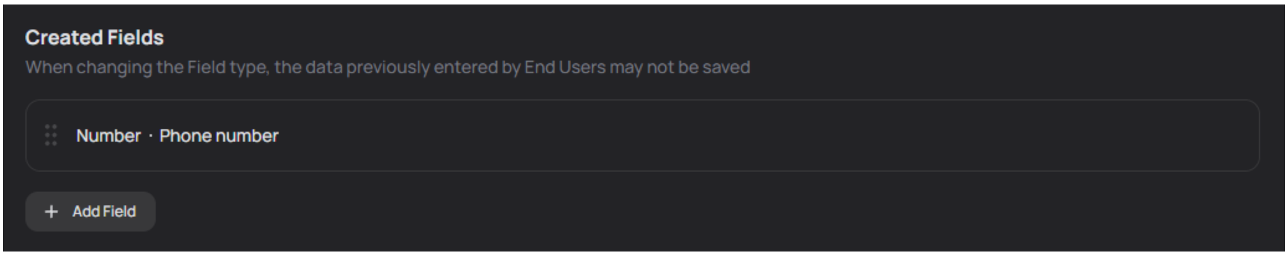
Add New User (Main, 1)

To add a new user fill in the following parameters:

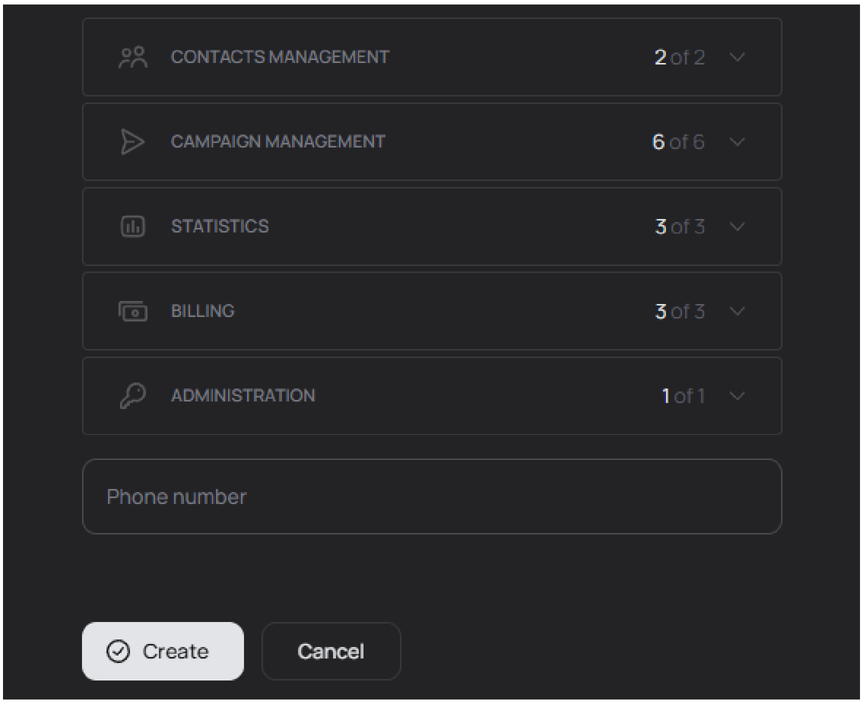
1. Enter the user's first name.
2. Enter the user's last name.

3. Enter the user's e-mail address.
4. If necessary, enter the user's additional email address.
5. Select the partner to which the user belongs.
6. Activate the user.
7. Select a role (for more detail refer to Roles 110):
   - When selecting a *Client 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* and cannot be changed.
   - When selecting the *Colleague to the current* user, the user will be created for the current portal.
8. Configure user access to partner data (for all System owner partners or selected partners).
   - By default - *Data access of all Partners* (all partners).
9. Specify which permissions will be available to the user (for more detail refer to Permissions 110).

NOTE: If a higher-level partner has created custom fields for the registration form in the Form Customization 126 interface for the contract company to which the partner of the user being created belongs, these fields will be displayed in the user creation window. For example:

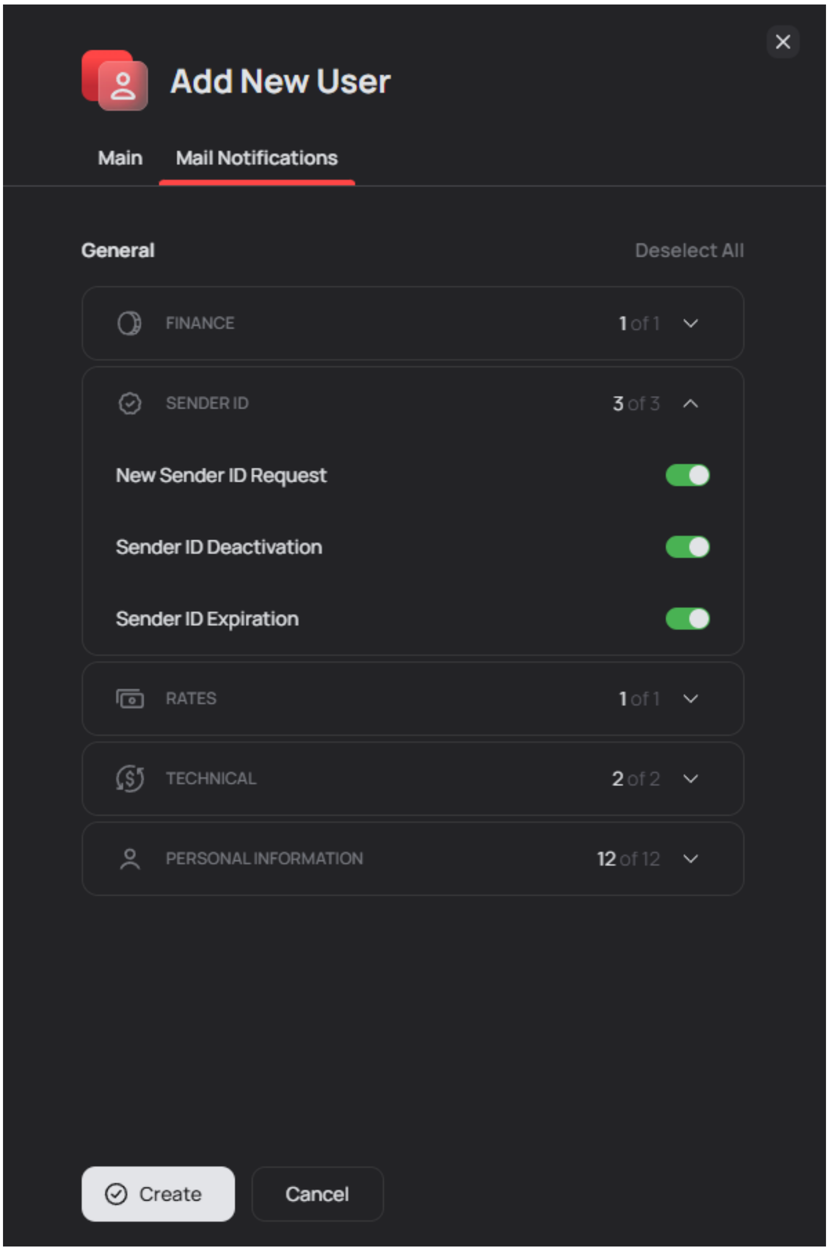


Admin Panel > Form Customization



Add new User (Main, 2)

If the user fills in these fields during self-registration or in the *Account Settings* section, the entered data will also appear here.

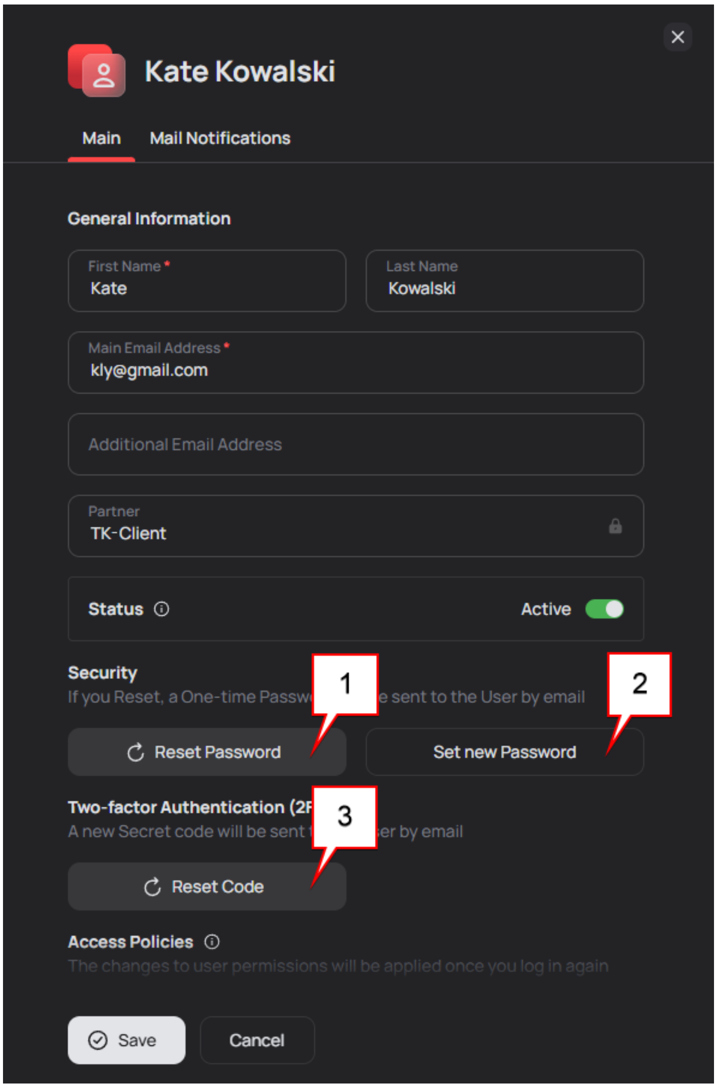


Add new User (Notification)

In the *Mail Notifications* tab, configure the list of notifications to be received, or keep the preset ones corresponding to the user's role. Notifications will be sent to the addresses specified in the *Main email address* and *Additional email* parameters.

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 user, you can change everything except *Partner*. The *Edit* form additionally allows the user to:

1. Reset the password.
   a. An email containing a link to change the password will be sent to the user.
   b. When the user clicks the link, they will be taken to a screen where they can enter a new password.
2. Manually change the password.
   a. The user can enter a password manually or have the System generate one by clicking the *Generate* button.
3. Reset the secret code for 2FA (if the option is enabled on the portal).
   a. An email containing a new secret key will be sent to the user.

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

NOTE: In order to change the 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. The user will receive an e-mail to the new address with a link to change the password for your account. Then they can log in with the new email.

16.1 Roles

The following five roles are available for Admin Panel users (Colleagues and Resellers). Each of them includes a set of predefined permissions (see Permissions 110):

- *Administrator*: All Permissions 110
- *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, API Connections
- *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 104 interface and disable access manually.

- *Campaign User*: View & Edit Contacts, View & Edit Campaigns, View & Edit Templates, View & Edit IDs, View Statistics, View Dashboard charts, View & Edit Subscriptions, View Transaction History, API Connections, Manage URL Shortener

16.2 Permissions

16.2.1 Admin Panel

Partners

Interface	Description
Edit Partners	Full access to the Partners 37 interface: view, edit and delete a partner. To create a partner you need a combination of *Edit Partners* + *Edit Payments* permissions, otherwise the *Add Partner* button will be unavailable. If the permission is not granted, only viewing existing partners is allowed.

Rate management

Interface	Description
View Subscriptions	View the Subscriptions 43 interface. If the *Edit Subscriptions* permission is not granted: ○ the user cannot create or edit subscriptions. ○ the user cannot view subscription details, the list of subscribers or import history. ○ the user cannot see which subscriptions partners are subscribed to, look inside subscriptions, view rates in *Edit Partner*. If this permission is not enabled, the Subscriptions 43 interface is hidden. In *Edit Partner* the subscriptions section is hidden and the *Add Packs/Plans* button is not available. In the Statistics 97 interface in *Table Settings* and in *EDR Export*, the *Client Subscription* column is not available for selection.
Edit Subscriptions	Full access to the Subscriptions 43 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 Portals 33 interface. If the permission is not granted, only viewing is available. If *View Subscriptions* is disabled, the Subscriptions 43 interface is hidden.

Finance management

Interface	Description
Manage Payment Systems	Full access to the Payment Systems 120 interface - view, create and edit payment systems. If the permission is not granted, only viewing existing payment systems is available.
View Payments	Viewing the Finance → Payments 78 interface. If Edit Payments is not granted, the user cannot create manual balance corrections, and the *Finance* section is hidden in the *Edit Partner* form. If the permission is not granted, the *Payments* tab is hidden in the Finance 78 interface.
Edit Payments	Creation of manual payments in the Payments 78 tab of the Finance 78 interface, and display of the *Finance* section in the *Edit Partner* form.

Interface	Description
	If the permission is not granted, the user cannot create manual payments, and the *Finance* section is hidden in the *Edit Partner* form.
View Transaction History	View the Finance →Transaction History 80 interface. If the permission is not granted, the Finance →Transaction History 80 interface is hidden.

Statistics

Interface	Description
View Statistics	Full access to the Statistics 97 interface: view and export EDRs, view and export *EDR Export Task*. If the permission is not granted, the Statistics 97 interface is hidden.
View Manager Statistics	View statistics for managers in the *Partner Manager* column in Client Analytics 32 section in the Dashboard 24 interface. The column lists the managers assigned to partners in *Add/Edit Partners > Managers*. The user can only see in the Statistics those partners and their managers to whom they have access within the *Data access by Partn*ers settings. If permission is not granted, the *Partner Manager* column is hidden.
View Dashboard Charts	View the Dashboard 24 interface. If permission is not granted, the interface is hidden.

Administration

Interface	Description
Manage Contract Companies	Full access to the Contract Companies 140 interface: view, create, edit and delete contract companies. If the permission is not granted, only viewing existing contract companies is allowed.
Manage Reference book	Full access to the Reference book 137 tab in the e.212/e.164 Reference Book 136 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 Reference book 137 tab in the e.212/e.164 Reference Book 136 interface; availability of the *HLR* checkbox in the Partners > Options 37 interface. The tab and checkbox are hidden if the permission is not granted.
View Portals	View the Portals 33 interface. If the *Edit Portals* permission is not granted, the user cannot perform actions with portals (create, edit, delete). If the View Portals

Interface	Description
	permission is not granted, the interface is hidden.
Edit Portals	Full access to the Portals 33 interface: view, create, edit and delete portals and their settings. If the permission is not granted, the user can only view the Portals 33 interface. If the *View Portals* permission is not granted, the Portals 33 interface is hidden.
View Users	View the Users&Roles 104 interface without the ability to perform user actions (create, edit, delete). If the *Edit Users* permission is not granted, the user cannot perform actions with users (create, edit, delete). If the permission is not granted, the Users&Roles 104 interface is hidden.
Edit Users	Full access to the Users&Roles 104: create, edit and delete users. If the permission is not granted, the user can only view the interface. If the *View Users* permission is not granted, the interface is hidden.
View SenderIDs	View the Sender IDs 84 interface (*Senders* and *Sender ID Subscriptions* tabs). If the *Edit SenderIDs* permission is not granted, the user can only view the interface. If the *View SenderIDs* permission is not granted, the interface is hidden. The *Sender Number* column cannot be selected in the Statistics > EDR export 97 interface in the *Table Settings* tab and *EDR Export* form.
Edit SenderIDs	Full access to the Sender IDs 84 interface (*Senders*, *Sender ID Subscriptions* and *Events* tabs): viewing, creation, editing and removal of Sender IDs and assigning them to partners, as well as approval and rejection of Sender IDs (Events 94 tab). If the permission is not granted, only viewing is available, and the Events 94 tab is hidden. If *View SenderIDs* is disabled, the Sender IDs 84 interface is hidden.
Manage Forms Customization	Full access to the Form Customization 126 interface, adding, editing and/or deleting custom parameters. If not granted, the Form Customization 126 interface is hidden.
System Settings	Full access to the Password Policy 118 interface: configuring password rules, resetting settings to their default values. If not granted, the Password Policy 118 interface is hidden.
Pre-Moderation management	Full access to the Pre-Moderation 74 interface: approval of pre-moderation requests; access to viewing/editing the list of prohibited terms. If not granted, the Pre-Moderation 74 interface is hidden.
API Connections	Full access to the API Connections 142 interface: creation of keys, viewing documentation. If not granted, the API Connections 142 interface is hidden.

Interface	Description
Manage URL Shortener	Full access to the URL Shortener 123 interface: view, create, modify or delete short domains. If not granted, the URL Shortener 123 interface is hidden.
Manage Notifications	Full access to the Notifications 129 interface: view, create, modify or delete mail servers, notification templates, view mail send history. If not granted, the Notifications 129 interface is hidden.

Routing management

Interface	Description
View Vendor Products	View the Vendors > Products 61 interface. If *Edit Vendor Product* is not granted, the user cannot perform actions in the interface, but can export rates from products. If disabled, the Vendors > Products 61 interface is hidden. In the Statistics 97 interface in *Table Settings* and in *EDR Export* tabs, the *Vendor Subscription* column is not available for selection. If the permission *View Vendor Endpoints* is not granted, the Vendors 61 interface is hidden.
Edit Vendor Products	Full access to the Vendors > Products 61 interface: create, edit and delete vendor products, import rates to products. In the Statistics 97 interface in *Table Settings* and in *EDR Export*, selection of *Vendor Subscription* column is available. If the permission is not granted, only viewing is available. If View Vendor Products is disabled, the Vendors > Products 61 interface is hidden. In the Statistics 97 interface in *Table Settings* and in *EDR Export* tabs, the *Vendor Subscription* column is not available for selection. In the *Endpoints* tab the user can only view endpoints. If the *View Vendor Endpoints* permission is not granted, the Vendors 61 interface is hidden.
View Vendor Endpoints	View the Vendors > Endpoints 63 interface. If *Edit Vendor Endpoints* is not granted, the user can not perform any actions with endpoints, the toggle switch is disabled. If the permission is not enabled, the Endpoints 63 tab is hidden in the Vendors 61 interface. The *Endpoints* column selection is not available in the Statistics 97 interface in *Table Settings* and in *EDR Export*. If the permission *View Vendor Products* is not granted, the Vendors 61 interface is hidden.
Edit Vendor Endpoints	Full access to the Vendors > Endpoints 63 interface: create, edit and delete Endpoints, the enable - disable toggle available directly in the table. If not enabled, the user can only view endpoints. If *View Vendor Endpoints* is disabled, the Endpoints 63 tab is hidden in the Vendors 61 interface.

16.2.2 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. 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 (*Recipients*).
Edit Contacts	Full access to the *Contacts* interface: view, create, edit or delete contacts/groups, import contacts/groups, add new *Contact Fields* 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, Groups* and *StopList* tabs are available for viewing only. The Import History tab is hidden, the *Contacts* tile is hidden in the *Quick access* section of the *Dashboard*. 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 campaigns 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* tile with the *Create Campaign* button. If the permission is not granted, the *Dashboard* interface does not have the *Campaigns* tile with the *Create Campaign* button, and the *Campaign List* and *Campaign Wizard* interfaces are hidden.
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 in Partners 37 -> *Options*. If the permission is not granted, the *Templates* interface is hidden.

Interface	Description
Edit Templates	Full access to the *Templates* interface: create, edit and delete templates, the *Save as Template* button is available in the *Campaign Wizard* interface. The *Reply Templates* tab is available if the user has the *MO messages* option enabled in [Partners](37) -> *Options*. 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 with Sender IDs. If the permission is not granted, the *Sender IDs* interface is hidden.
Edit SenderIDs	Full access to the *Sender IDs* interface: the user can request new Sender IDs, and perform all other operations with them. The *Sender ID* tile with the *Add Sender ID* button is available in the *Dashboard* in the *Quick access* section. If the permission is not granted, the *Sender ID* tile 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 Number* column is not available for selection. In the *Finance* interface, the *Show details* option is hidden. The user can still use previously registered Sender IDs 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 export EDR records, view and export *EDR Export Task*. If in *Partners > Options*: o the *MO messages* option is not enabled, the *EDR Type* and *Dialogue ID* columns are not displayed. o the *Flash SMS* option is not enabled, the *Channel* column is not filtered by the Flash type. If the permission is not granted, the *Statistics* interface is hidden.
View Dashboard charts	Full access to the *Dashboard* interface: view charts and access quick action buttons. If the permission is not granted, the interface is hidden.
Manage URL Shortener	Full access to the *URL Shortener* interface, viewing the *Short URL* column in the *Campaign List* interface, and availability of the *Short Link* button in the *Campaign Wizard* interface. If the permission is not granted, the *URL Shortener* interface is completely hidden, and the *Short URL* column and *Short Link* button are unavailable.

Billing

Interface	Description
View Purchased Subscriptions	View the *Purchase* interface: purchased packs and plans and their details. If the *Edit all Subscriptions* permission is not granted, purchasing new subscriptions is not available. If the permission is not granted, the *Purchase* interface is hidden. In the *Dashboard* interface, purchased packs/plans and the *Add New* button are hidden.
Edit all Subscriptions	Full access to the *Purchase* interface: view and purchase available packs and plans, view purchased pack and plan details. In the *Dashboard* interface, purchased packs/plans and the *Add New* button are available. If the permission is not granted, the *Purchase* interface is hidden and new plans and packs cannot be purchased. In the *Dashboard* interface, *Packs & Rate Plans* are hidden.
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: create, edit and delete keys. If the permission is not granted, the *API Connections* interface is completely hidden.

17 Settings

17.1 Password policy

The *Password Policy* interface is designed for defining rules for creating secure passwords.

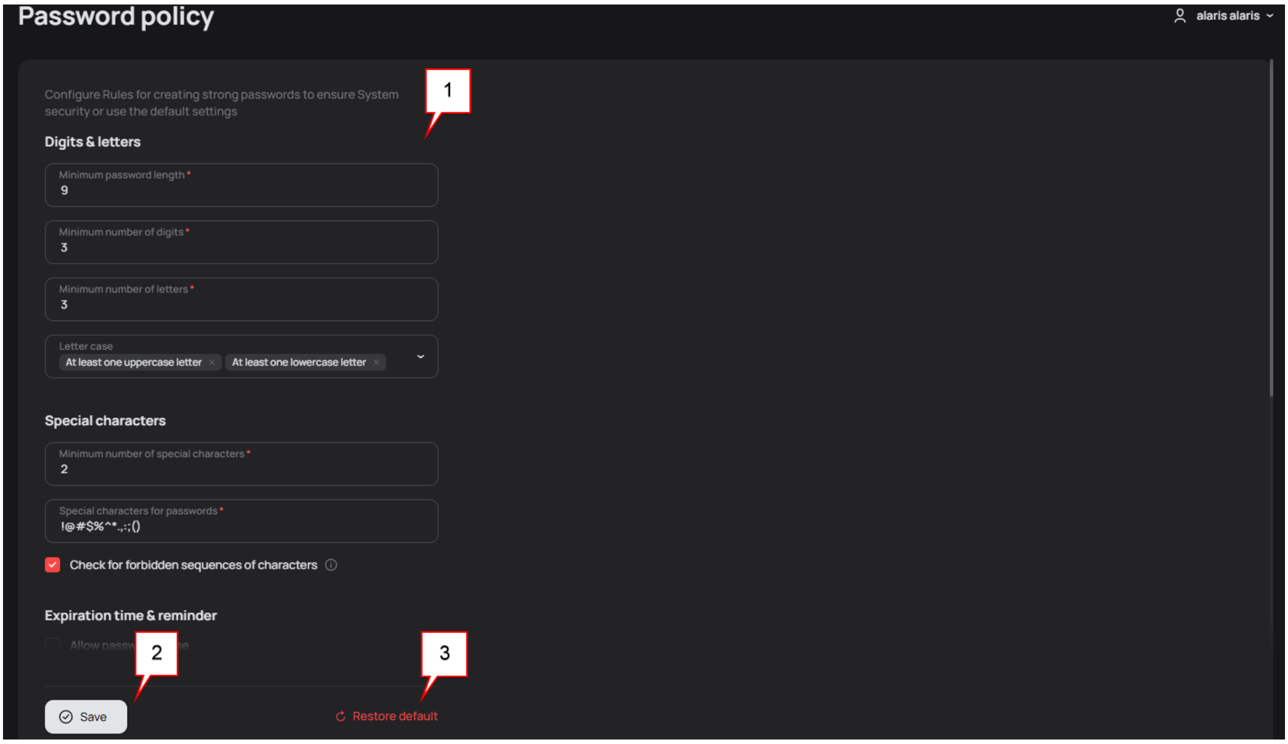
The System owner configures the required parameters in this interface and saves the changes. After saving, the specified settings are applied to all operations related to password input, validation, and generation.

A password can be specified in three situations:

- When registering a new user in the *Signup Form*.
- When a user changes their password in *Account Settings*.
- When an administrator changes a password in Users & Roles 104.

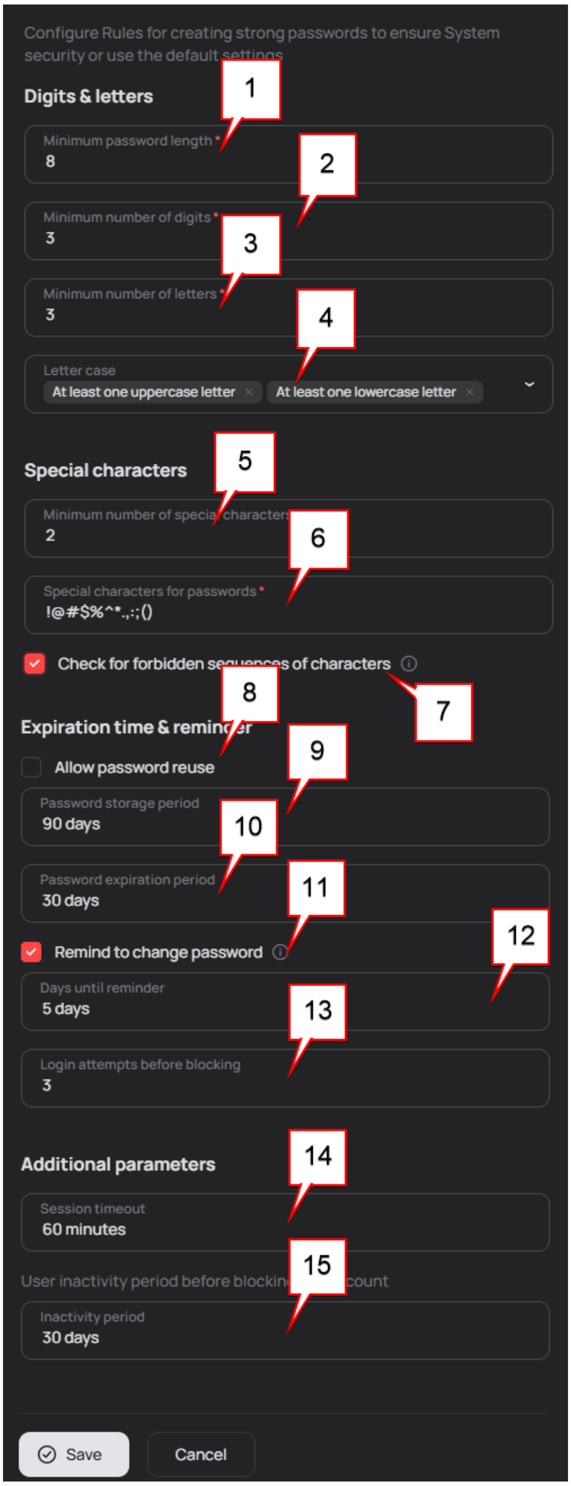
A password can be entered manually or generated by the System. It is possible to generate a password when a user changes it in *Account Settings* or when an administrator does so in Users & Roles 104 by clicking the *Generate* button. The System will automatically generate a password that complies with the parameters defined in the *Password Policy* interface.

The interface is a form containing all available password settings.



General

You can specify your own password rules (1) and save them by clicking the *Save* button (2), or keep the default settings. If you have previously made changes, you can click *Restore default* (3) to reset the settings to their default values.



General

To configure password rules, fill in the following parameters:

1. Specify the minimum password length (default: 8 characters).
2. Specify the minimum number of digits in the password (default: 3 digits).
3. Specify the minimum number of letters in the password (default: 3 letters).
4. Configure the mandatory use of uppercase and lowercase letters in the password (default: at least 1 uppercase and 1 lowercase letter).

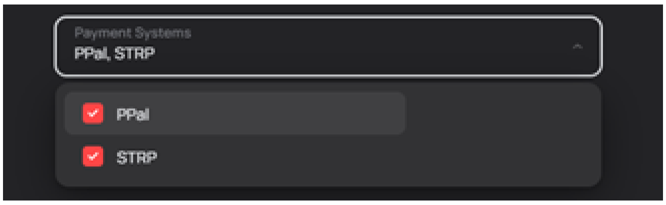
5. Specify the minimum number of non-alphanumeric characters in the password (default: 2 characters).
6. List the characters that are allowed in the password (default: !@#$%^*.,:;()).
7. Enable the prohibition of invalid character sequences in the password (default: enabled).
8. Configure password reuse (default: disabled).
9. Specify the number of days for which previously used passwords are stored (default: 90 days). Not displayed if password reuse is enabled.
10. Specify the password expiration period in days (default: 30 days).
    - The period is limited by the *Password expiration period* parameter, which specifies the number of days.
    - After the password expires, the user can continue to log in only within the number of attempts specified in the *Login attempts before blocking* parameter, after which they will be required to change the password.
11. Configure the sending of reminders to change the password (default: enabled).
    - After the password expires, the user receives a notification about the need to change the password if the *Remind to change password* parameter is enabled.
12. Specify the number of days before the password expires at which the reminder will be sent (default: 5 days). The user will receive an email notification N days before the password expires. Not displayed if password change reminders are disabled.
13. Specify the number of successful logins allowed after the password expires (default: 3). The user will be able to log in N more times before a password change is required.
14. Specify the inactivity timeout in minutes after which the user will be automatically logged out (default: 60 minutes).
15. Specify the maximum period of user inactivity in the System after which the account will be blocked (default: 30 days). The user will be notified of the block and the need to take action to restore access, for example, through a password reset procedure or by contacting the administrator.

To save the changes, click *Save*. Click *Cancel* to cancel the action.

17.2 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.

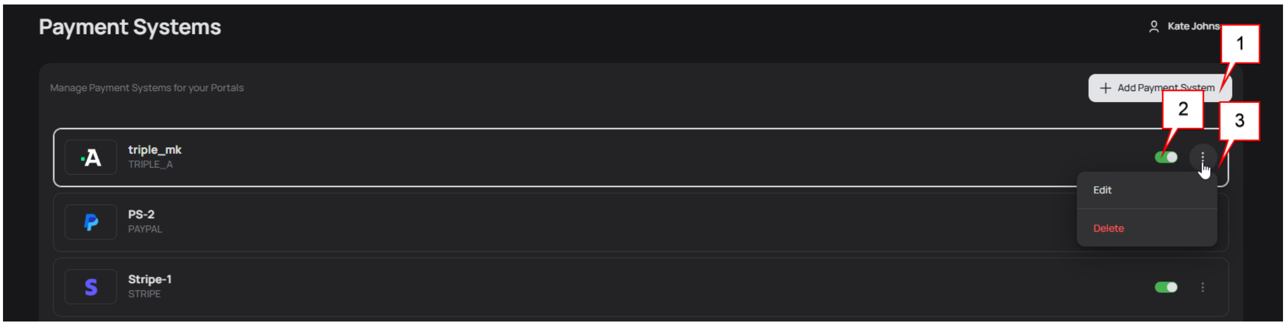
A payment system is assigned when configuring a contract company in the Contract companies 140 interface:



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.

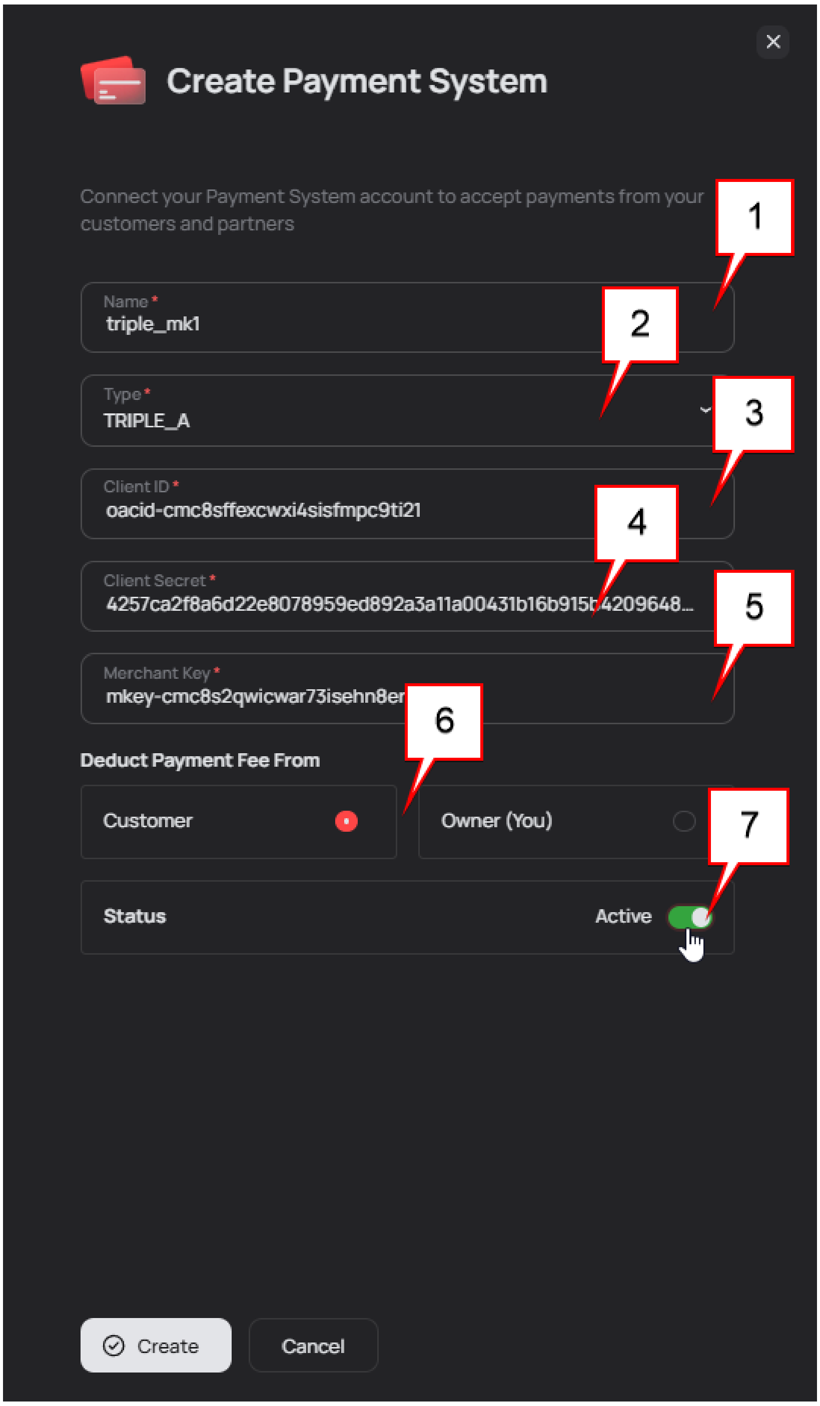
The interface is a list of payment systems containing subscription data in alphabetical order.



You can:

1. Click the *Add Payment System* button located in the top right corner and add a new payment system.
2. Activate or deactivate a payment system.
3. 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, Stripe, Triple A or Revolut*).
3. Specify the client ID.
4. Specify the client's secret key.
5. For *Triple A*, specify the seller's unique ID.
6. Choose from whom to charge the payment commission (*Client* or *Owner* (you)).

7. 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.

17.3 URL Shortener

The *URL Shortener* interface is designed for creating short domains that clients will subsequently use when launching campaigns.

Short domains allow long URLs to be shortened, which reduces message length, lowers the segment count, and decreases the overall campaign cost.

How it works:

System owner:

- Configures short domains in the *URL Shortener* interface.
- When configuring contract companies in the Contract Companies 140 interface, assigns short domains to them from the available ones.
- After a short domain is successfully added, it becomes available to clients when creating short links in the *Campaign Wizard* interface.
- Each short domain serves as a base for generating unique short links for campaigns.

Reseller:

- In the *URL Shortener* interface, sees the list of domains assigned by the System owner or a higher-level Reseller to their contract company.
- Cannot edit or delete such domains.
- If necessary, can create their own short domains, which they will subsequently assign when configuring contract companies in the Contract Companies 140 interface.

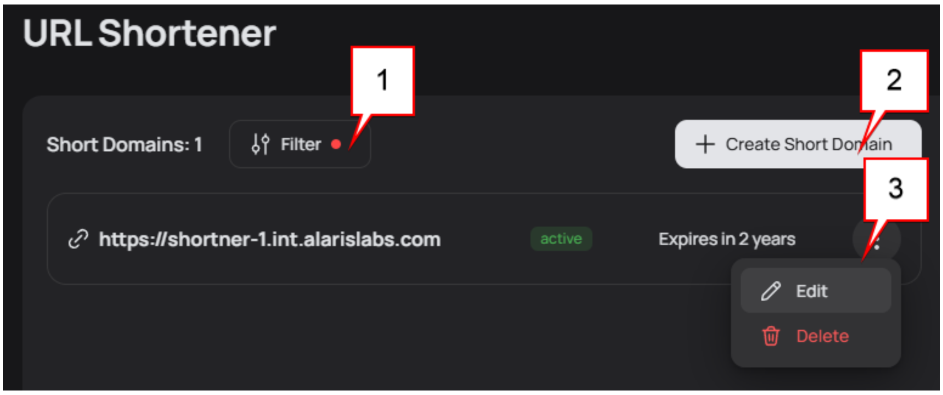
Client:

- When creating a campaign, inserts the *Original URL* into the message text and in the *Short URL* parameter can select a short domain available for their contract company, provided it is active and its certificates are not expired. Only one link can be shortened:
  - In case of a cascade campaign, the short link will be shared and identical across all channels.
  - For the WhatsApp channel, short URL works within templates:
    - If a link has already been shortened in the template for a button with the URL type, then in a cascade campaign for other channels (SMS, Viber) repeated shortening is not available and a button with the ready short link is displayed directly.
    - If shortening was not applied in WhatsApp, the user can shorten the link in one of the other channels, but will not be able to add the link for the WhatsApp channel (since all parameters are locked for editing).
- Launches the campaign, and the System begins collecting and tracking click statistics.

NOTE: At the current time, the System does not support counting unique clicks on short links.

The interface displays a list of all created domains as tiles. Each tile contains the following information:

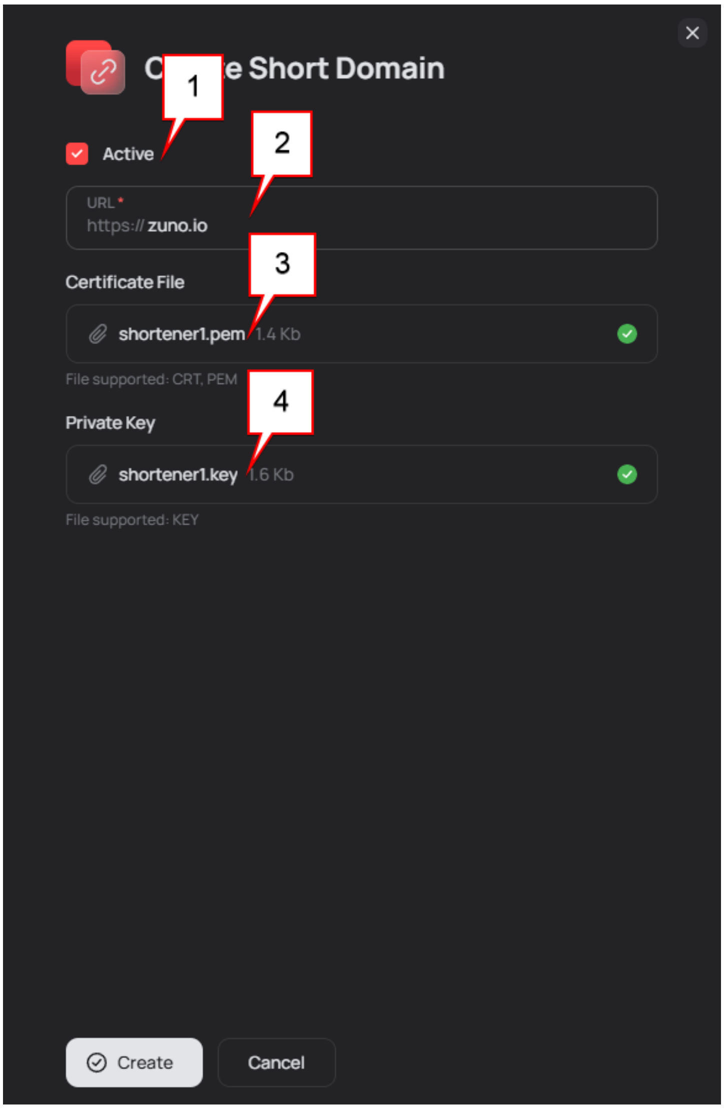
- The domain URL address.
- The domain status (*Active* / *Inactive*).
- The certificate expiry date.



URL Shortener

The user can:

1. Use the filter to display relevant records.
2. Click the *Create Short Domain* button located in the top right corner and add a new Short Domain.
3. Edit or delete Short Domains. To do this, click the context menu ⋮ and select the required action.
    a. For Resellers, these buttons are available only for domains that they created themselves.



Create Short Domain

To add a new short domain, fill in the following parameters:

1. Activate or deactivate the domain (active by default).
    a. If the SSL certificate has expired, the activation checkbox will be disabled and activation will not be available.
2. Specify the domain URL.
3. Upload the certificate file in .crt/.pem format (up to 10 MB) by clicking on .
4. Upload the certificate key file in .key format (up to 10 MB) by clicking on .

After filling in the parameters, click the *Create* button. When creating new domains, uniqueness is verified. The System does not allow domains with the same URLs. The *Cancel* button serves to cancel the action.

When editing, you can update the certificates and enable or disable the domain.

When deleting a short domain, the System performs a check:

- Whether there are any link clicks.

- Whether there are any active campaigns using this domain.

If no activity is found:

- The domain is permanently deleted from the database with no possibility of recovery.
- The short code is released and can be reused.

If activity is detected:

- The domain is hidden from the Admin Panel but remains in the database.
- Click statistics remain available in the *Campaign Portal > URL Shortener > Archive*.
- Links previously sent to users become invalid. When following such a link, a 404 page is displayed with the message: *"Sorry, can't find that Page. The Page you're looking for doesn't exist"*.

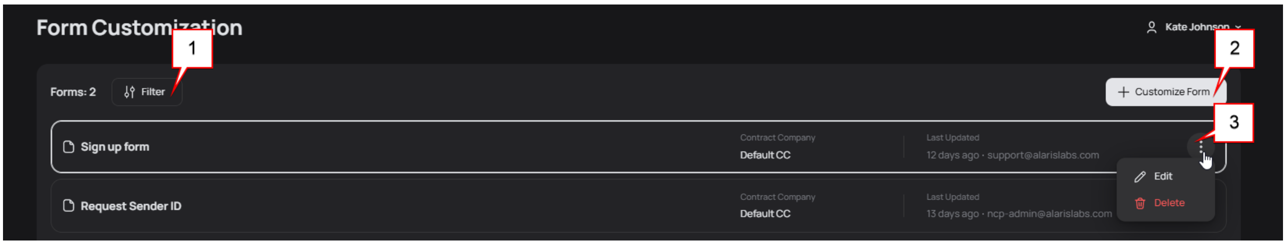
After deletion:

- The domain is removed from the *Short Domain List*.
- The domain also disappears from the *Short Domains* parameter in the Contract Companies 140 editing window.
- When the System owner deletes a domain, it also becomes unavailable for lower-level Resellers.
- If the domain was assigned to contract companies, it is automatically unlinked from them.

17.4 Form Customization

The *Form Customization* interface serves to configure 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

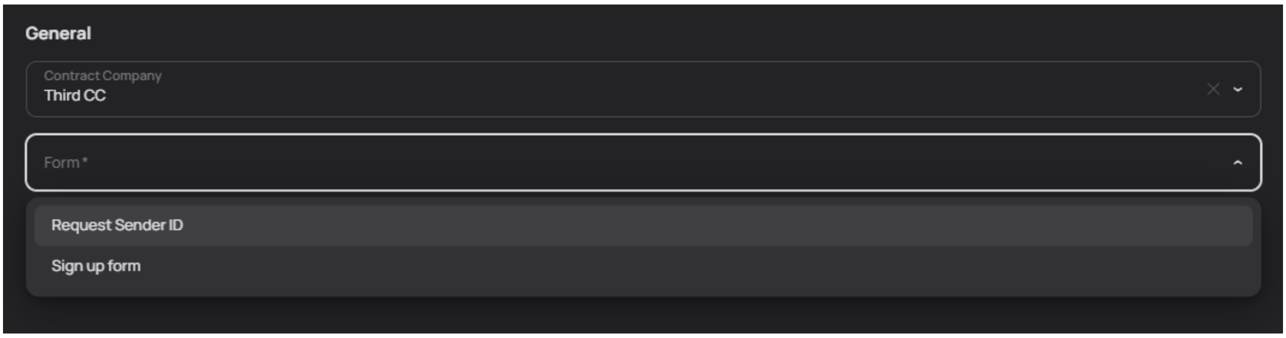
The user can:

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.*

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

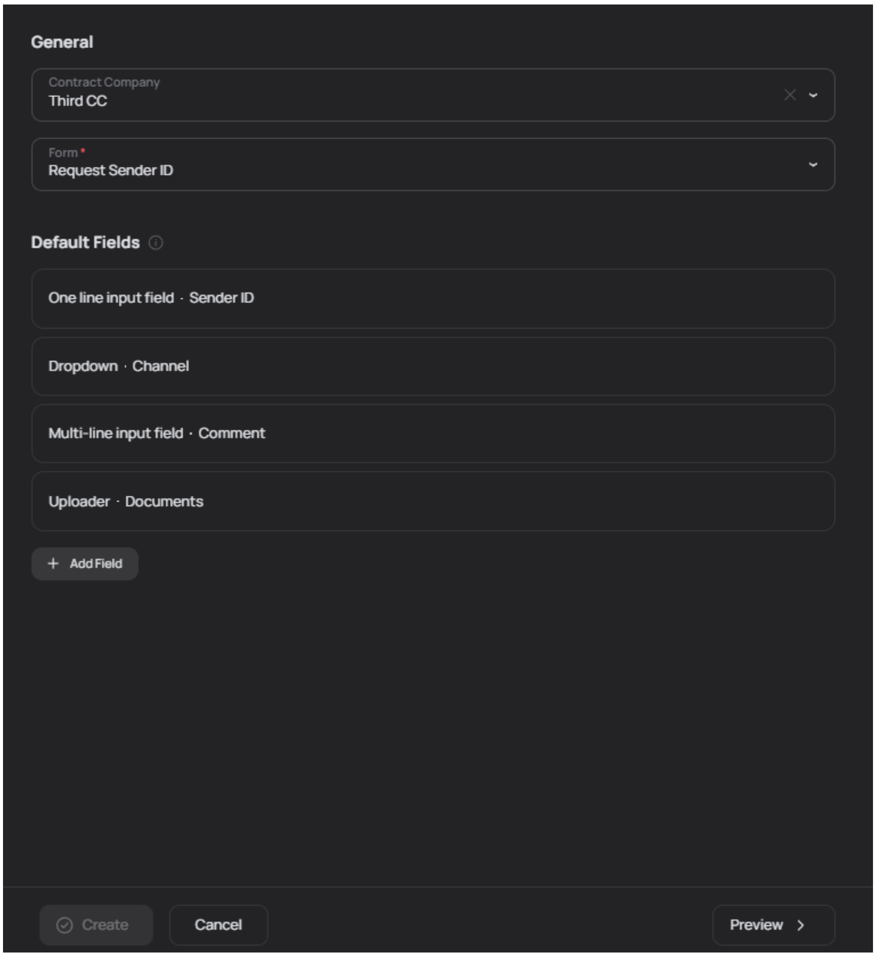
- *Sign up form*: form for self-registration of Campaign Portal new users



Customize Form

If a custom form already exists for the selected contract company, the System will not allow you to create a new one and will display an error message:

After selecting the form shown below, 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 block that serves to add a new field. Select the field type and configure the appropriate parameters.

Hover over a 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 in the form. The same actions that are applicable to all other blocks, are available for the disabled block.
- *Delete* serves to remove the block that was added earlier.

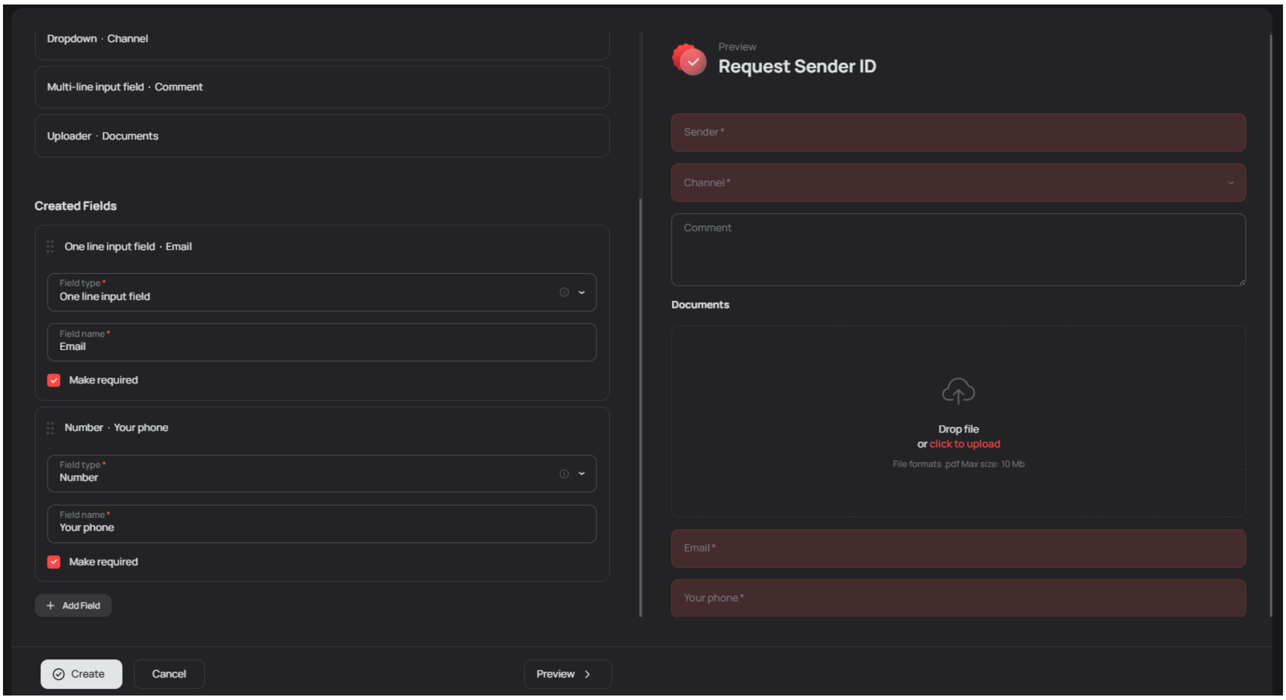
Create Fields

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.
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.YYYY 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 informational message or notifications shown in the form. The field is not intended for user input and will be displayed as a static text block visible to the user.
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.

NOTE: Custom fields created by a higher-level partner are displayed to lower-level partners as Default Fields and cannot be edited by them. Lower-level partners can add their own custom fields, which in turn become *Default Fields* for their own partners. The client sees all custom fields that have been added by all levels of partners in the chain.



Customize Form

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

17.5 Notifications

The *Notifications* interface is designed for configuring mail servers and templates on behalf of which the System owner or Reseller will send emails to their partners, allowing them to promptly inform their clients about important events while maintaining legal compliance and branding.

The interface is available to both the System owner and Resellers and consists of the following tabs:

- Mail Templates 129 — configuration of email notification templates.
- Mail Servers 132 — configuration of mail servers.
- History of sent emails 135 — history of sent notifications and error viewing.

17.5.1 Mail templates

About email templates:

All email notifications sent by the System when trigger events occur have a type and category, as well as their own template that defines the appearance of the email: subject, body, attachments, and variables automatically substituted upon sending.

Upon System installation, the System owner and Reseller are provided with a set of preconfigured Alaris default templates. These are used by default until they are replaced with custom versions.

For internal emails to the System owner's colleague users, notifications are generated based on the Alaris default templates and sent on behalf of the System owner's company (the name is automatically populated according to the internal System settings).

Emails to the System owner's partners (Resellers and clients) are also generated based on the default templates until custom templates are created. The following branding logic applies:

- The email body is taken from the default template.
- The logo is not fixed in the template and is substituted from the settings of the portal linked to the partner's Contract Company.
- Placeholders use the actual data of the partner and their Contract Company.

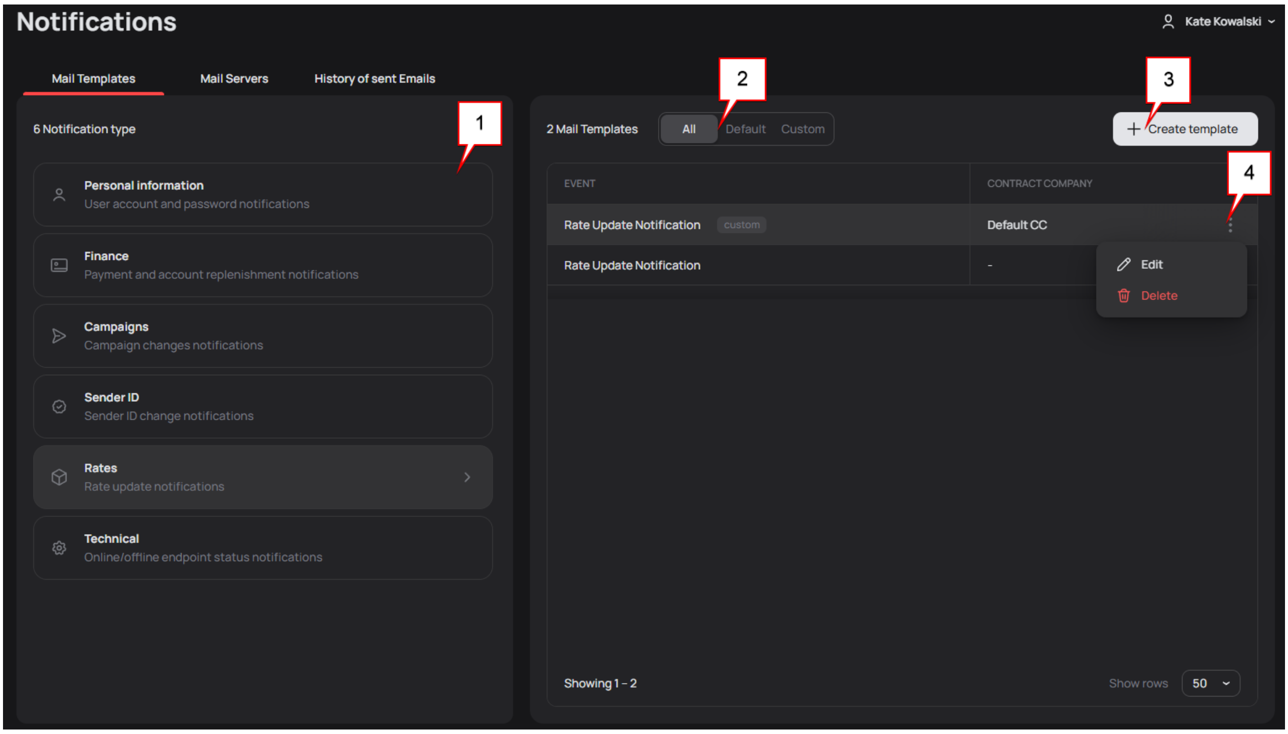
If a partner uses the Default Contract Company and the standard portal, the System owner must manually replace the portal logo.

A similar model applies to Resellers.

Internal emails to a Reseller's colleague users are generated depending on the System owner's settings:

1. Either the default templates are used.
2. Or custom templates are applied, if the System owner has created them for the Contract Company to which the Reseller belongs.

Resellers also have their own set of default templates for working with their lower-level partners. Until a Reseller creates custom templates for their Contract Companies, emails to such partners are generated based on the default templates with the actual data of the corresponding Contract Company substituted.

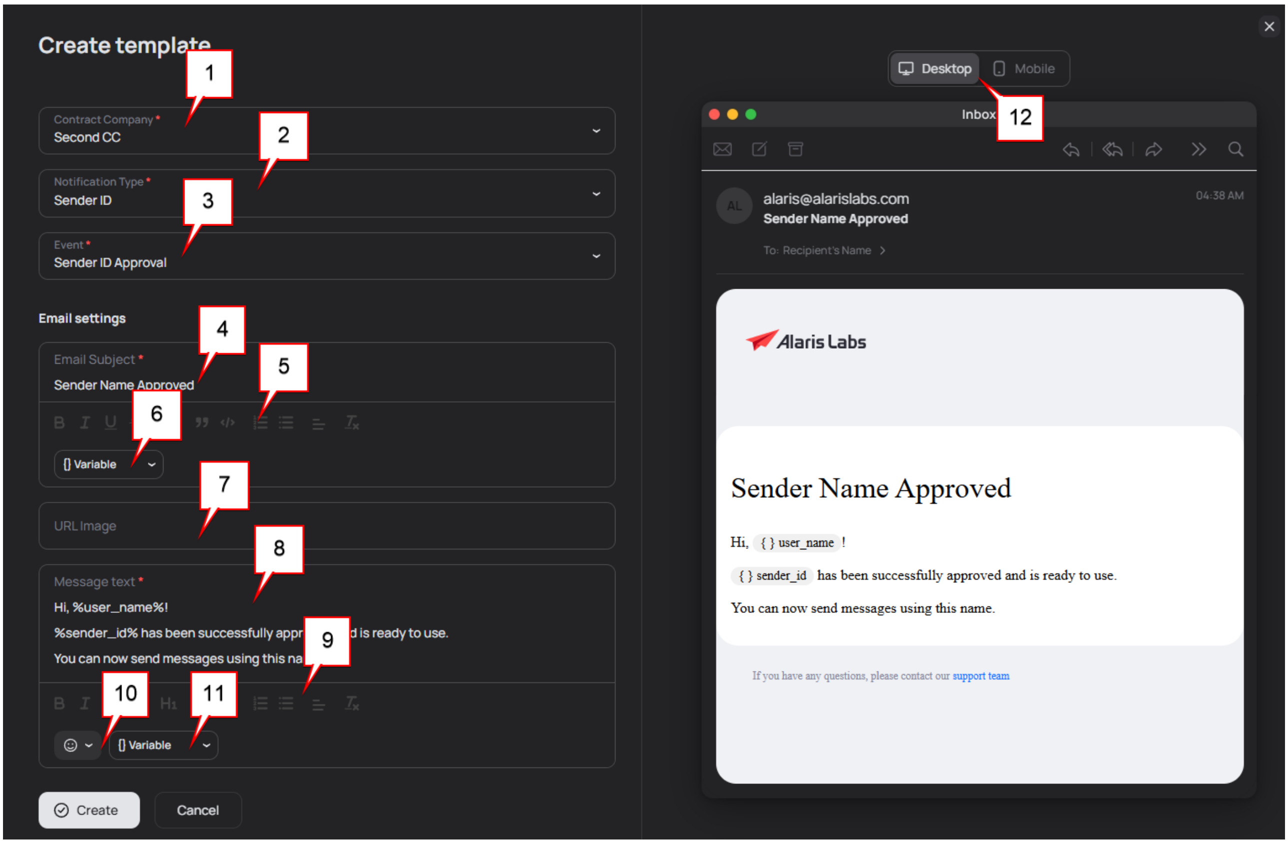


Notifications > Mail Templates

You can:

1. Select a notification type to view the available message templates associated with events of that type.

1. Use the quick filter to display a specific template type (*All*, *Default*, *Custom*).
2. Create a new template by clicking the *Create template* button.
3. Edit and delete custom templates, as well as view and duplicate System templates. To do this, hover over the required record and select the necessary action in the row.
   a. Users are not allowed to edit or delete default templates, but may clone them to create custom templates based on them.



Create Templates

To add a new notification template, fill in the following parameters:

1. Select the contract company.
2. Select the template category.
3. Select the event that triggers the email sending.
4. Specify the email subject.
5. If necessary, format the email subject.
6. If necessary, add variables to the email subject.
7. If necessary, add an image.
8. Specify the email body text.
9. If necessary, format the email body text.
10. If necessary, add emoji to the email body text.

11. If necessary, add variables to the email body text.
12. If necessary, switch the preview mode.

After filling in the parameters, click *Create*. After creation, the template will appear in the list. Click *Cancel* to cancel the action.

When editing a template, all parameters can be changed.

NOTE: When sending an email, a custom template always takes priority over a default one. This means that if a custom template exists for the contract company, the System uses it; otherwise, the default template is applied.

17.5.2 Mail Servers

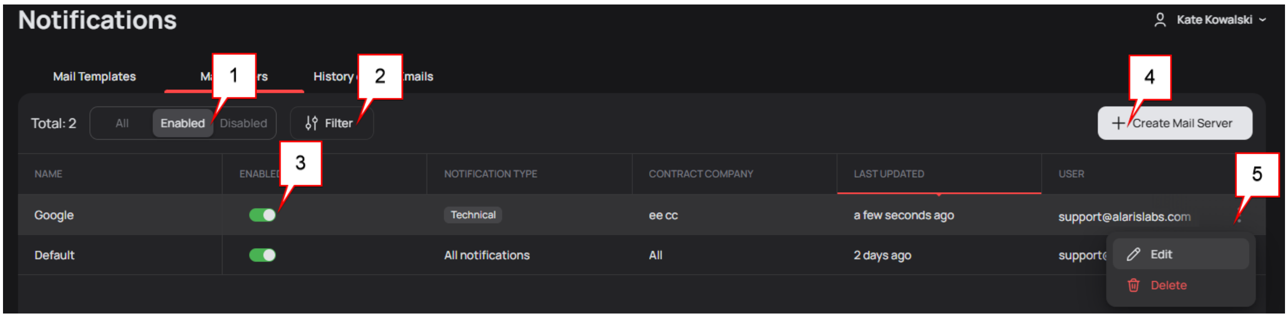
About mail servers:

Mail servers are required for sending notification templates to partners' email addresses on behalf of the specified senders (contract companies).

For products hosted on Alaris hosting and dedicated servers, each System owner is provided with a *Default server*, which is used to send all emails to the System owner and their lower-level partners if no other servers are configured.

This server is available for enabling/disabling and editing, as the System owner needs to make changes to configure their own mail server.

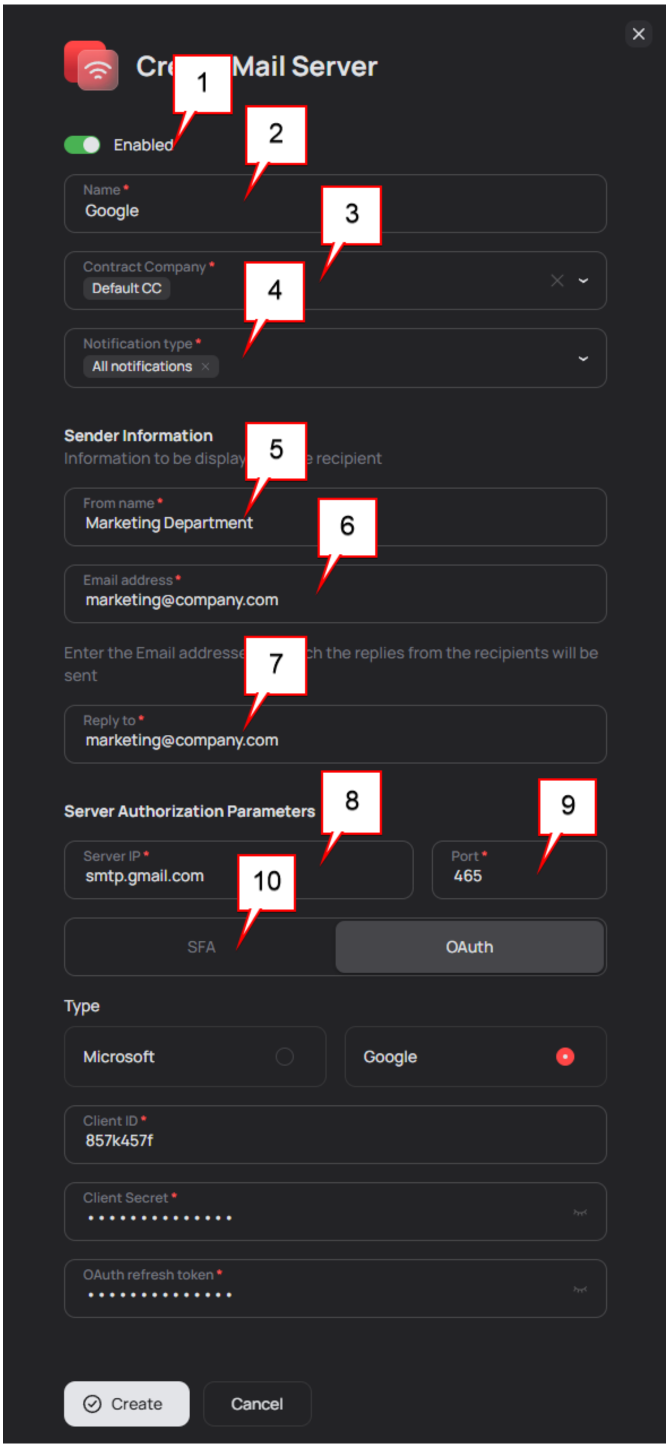
Resellers are not provided with a *Default server*. Emails to a Reseller's colleagues are sent through the server configured by their higher-level partner for their contract company. To send emails to their lower-level partners, a Reseller must configure their own server.



Notifications > Mail Servers

You can:

1. Use the quick filter to display a specific server type (*All*, *Enabled*, *Disabled*).
2. Use the filter to display relevant records by clicking the *Filter* button.
3. Enable or disable a server.
4. Create a new server by clicking the *Create Mail Server* button.
5. Edit and delete servers. To do this, hover over the required record and select the necessary action in the row.



Create Mail Server

To add a new mail server, fill in the following parameters:

1. Enable the mail server.
2. Specify the mail server name.
3. Select the contract company.
4. Select the template categories whose events will be sent through this server.
5. Specify the Sender ID that will be displayed next to the sender address.

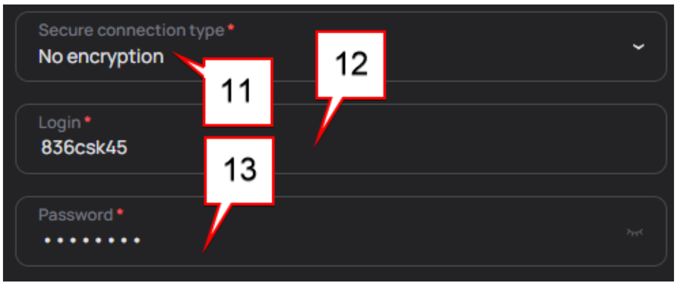
6. Specify the email address that will appear in the *From* field of the email.

7. Specify the email address to which replies will be sent.

8. Specify the address or domain of the mail server that the System will connect to for sending emails.

9. Specify the mail server port to be used for communication with it.

10. Select the authorization type and fill in the required parameters.



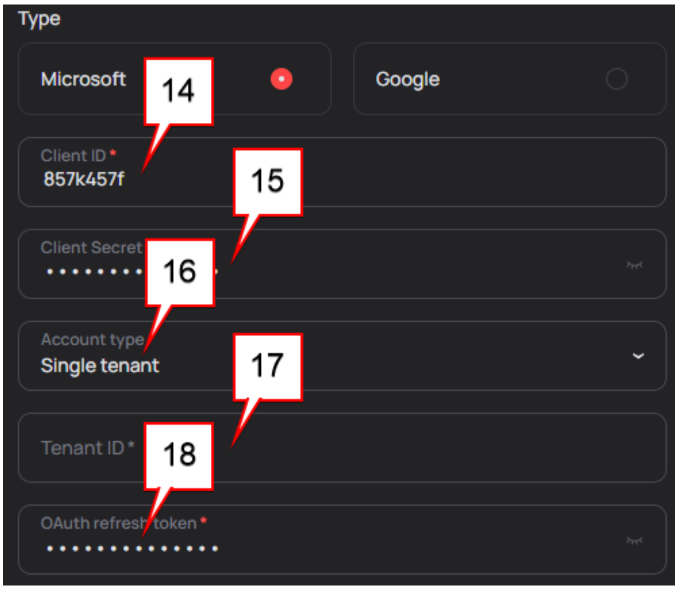
Create Mail Server (SFA)

For *SFA*, specify:

11. The type of secure connection to be used for encrypting the connection between the System and the SMTP server.

12. The mail server login used for authentication on the SMTP server.

13. The mail server password corresponding to the specified username on the SMTP server. The password is entered together with the login so that the server confirms that the System can use this account for sending emails.



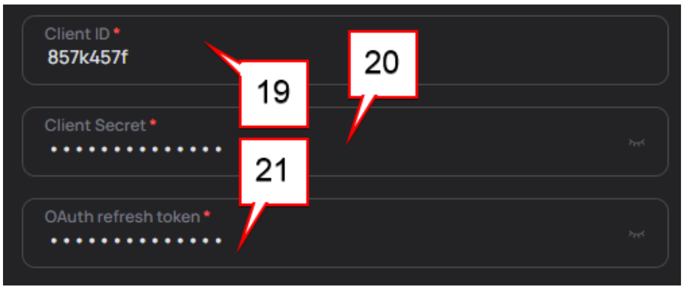
Create Mail Server (OAuth > Microsoft)

For *OAuth (Microsoft)*, specify:

14. The unique identifier of the application registered in Azure AD.

15. The application secret used for authentication when connecting to the service.

16. The account type in Azure AD (*Single tenant* or *Multi tenant*).
17. The tenant (organization) identifier in Azure AD (used only if the application is restricted to a specific tenant).
18. The refresh token allowing the System to obtain new access tokens without user involvement.



Create Mail Server (OAuth > Google)

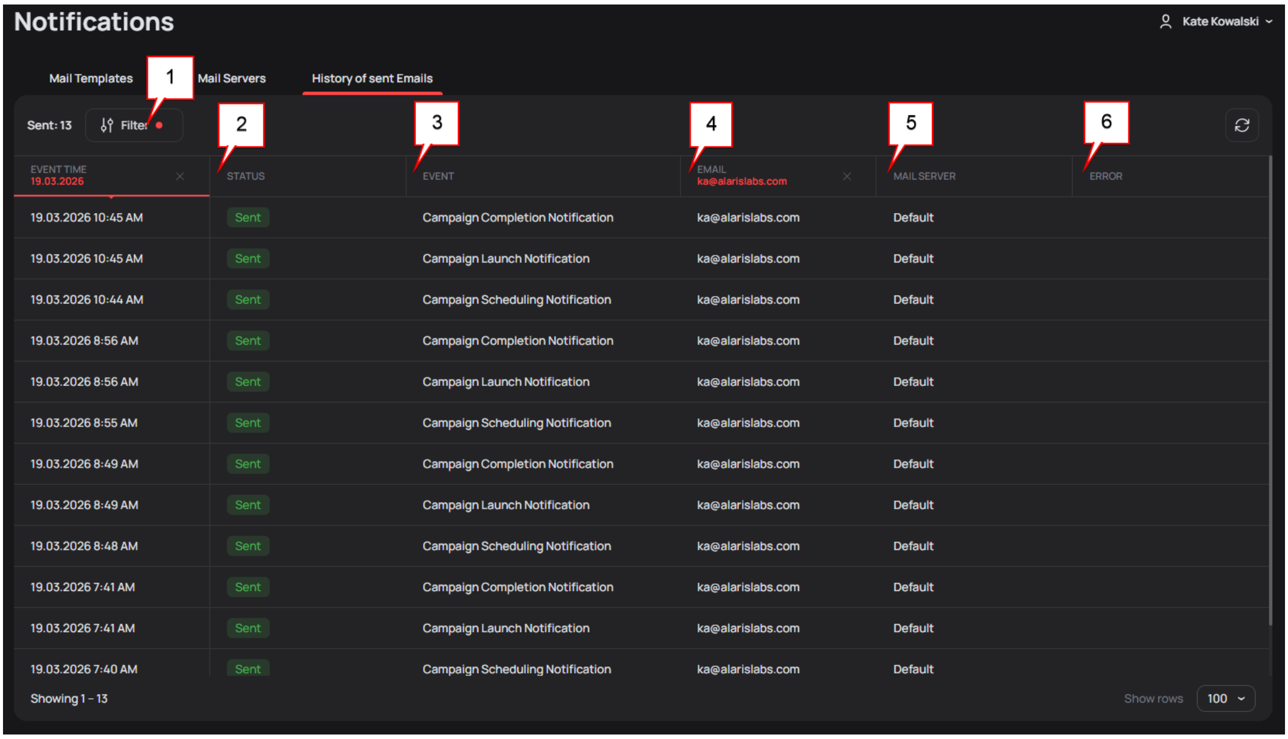
For *OAuth (Google)*, specify:

19. The unique identifier of the application registered in Google Cloud.
20. The application secret used for authentication when connecting to the service.
21. The refresh token allowing the System to obtain new access tokens without user involvement.

After filling in the parameters, click *Create*. After creation, the server will appear in the list. Click *Cancel* to cancel the action.

When editing a server, all parameters can be changed.

17.5.3 History of sent emails



Notifications > History of sent emails

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

You can:

1. Use the filter to display relevant records by clicking the *Filter* button.
2. View the email sending status.
3. View the event that triggered the email sending.
4. View the recipient of the email.
5. View the mail server used to send the email.
6. View the error if the email was not sent successfully.

It is also possible to resend an email if an error occurred during the first sending attempt. To do this, hover over the required record and select the *Resend* action. A new record is created upon resending.

17.6 e.212/e.164 Reference Book

Since rates and routing are based on MCCMNC, and messages are sent to specific numbers, it is necessary to know which network and country each number belongs to for correct message billing and routing.

Upon installation of Alaris Campaign Portal, the System owner receives the initial Reference Book, which they will update and maintain independently.

The Reference Book is available to the System owner only.

Starting from version 1.8.0:

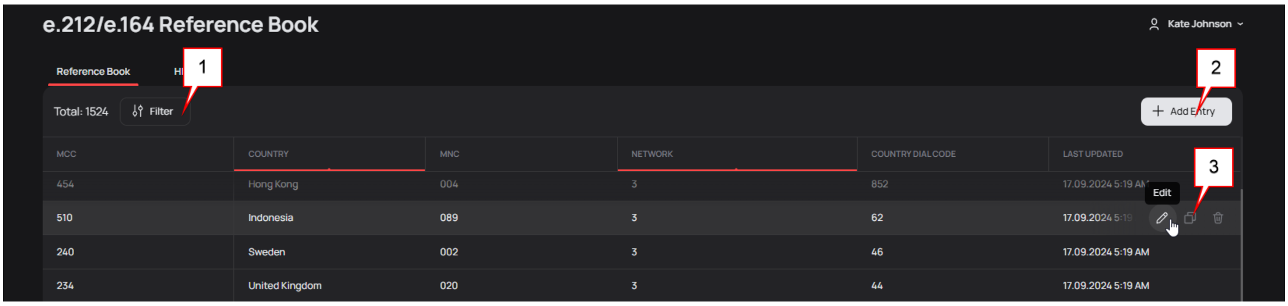
- A previously added country now has the *Any Network (MCC%)* network.
- When an MCC first appears in the System (either by rate import through the Import Rates 53 interface or by creating an entry directly in the Reference Book), two records are automatically added to the Reference Book:
  - MCC/ Country/empty MNC/*All networks*.
  - MCC/Country/ MNC with the value *%/Any network*.

Therefore, when creating or editing endpoints, in the *Country & Network* field you can specify MCCMNC values for both *All networks* and *Any network*.

The *e.212/e.164 Reference Book* interface consists of 2 tabs:

- Reference Book 137 — a table of e.212 (MCCMNC) and e.164 (number prefix) pair mappings, with the ability to create, edit, or delete mappings.
- HLR 139 — configuration of connection parameters with Alaris MNP Server.

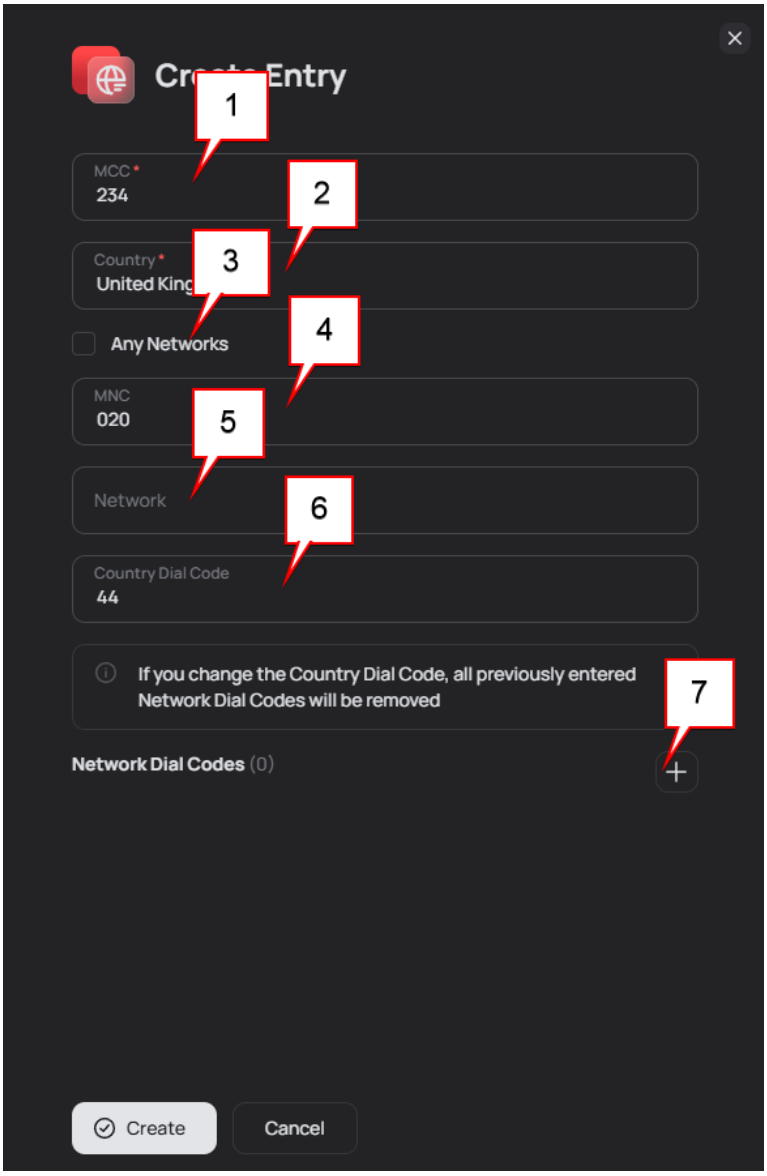
17.6.1 Reference book



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.

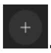


Create Entry

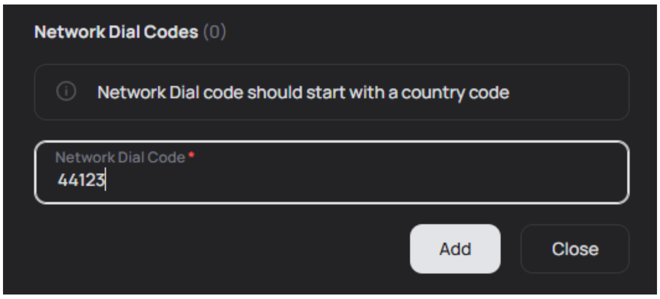
To add a new mapping record, complete the following parameters:

1. Enter the country code (MCC).
2. Specify a country.
3. If necessary, select the *Any Network* checkbox, which specifies that the entry is an MCC% wildcard destination for all MNCs of this MCC.
   a. If the MNC field is empty when saving, and the checkbox is:
      i. Selected → an *Any Network* (MCC%) entry is created.
      ii. Deselected → an *All Networks* (MCC) entry is created.
4. Specify the network code (MNC).
5. Specify a network.
6. Specify the country code.

7. After filling in the required parameters, you 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). To do this:

   a. Click the button .

   b. In the field that appears, enter the network dial code and click the *Add* button to add the value. The Close button is used to cancel the action.



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.

All parameters are editable.

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.

17.6.2 HLR

The tab serves to configure connection between Alaris Campaign Portal and Alaris MNP Server.

HLR

In order to configure a connection, specify the following data:

- *Login*: specify the user login:
  - If Alaris MNP Server is employed, the login is taken from the Alaris MNP Server interface (*Clients* tab).
  - If Alaris MNP Server 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 MNP Server 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 MNP Server is employed, the default port is 29000.
- If Alaris MNP Server 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 MNP Server is employed, use the IP address or host name of the internal service - hlrproxy3.
    - If Alaris MNP Server 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 MNP Server 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 MNP Server:

- If the Alaris MNP Server is used, the *hlr_smsrt_api* permission can be granted through the Alaris MNP Server interface.
- If an HLR server is used without the Alaris MNP Server but with a configuration file, this permission must be explicitly specified in the appropriate configuration parameters for the user.

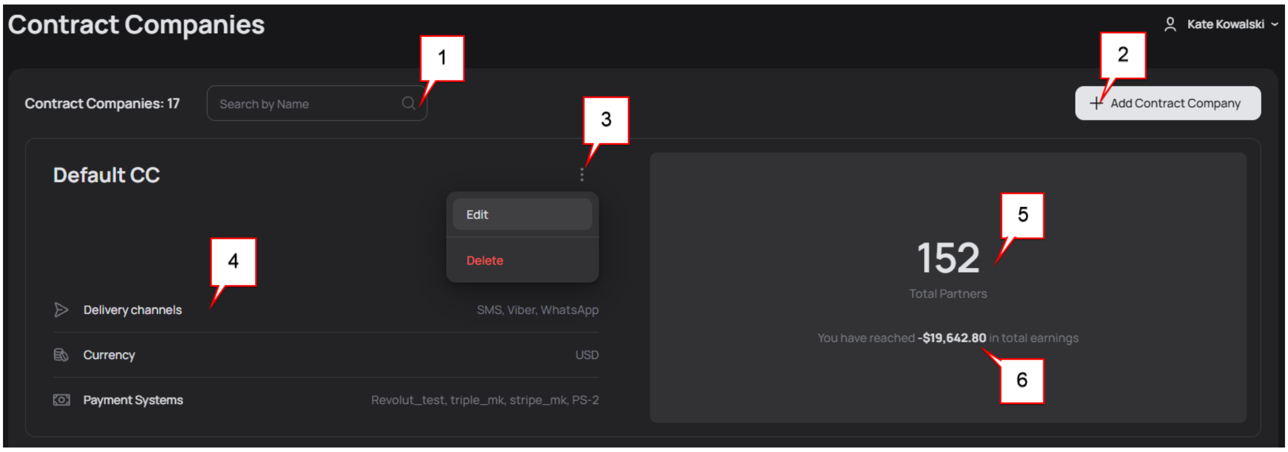
Without this permission, requests to the HLR proxy may be rejected or ignored by the System.

17.7 Contract Companies

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

Upon installation of the System, a default contract company - Default CC - is 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.

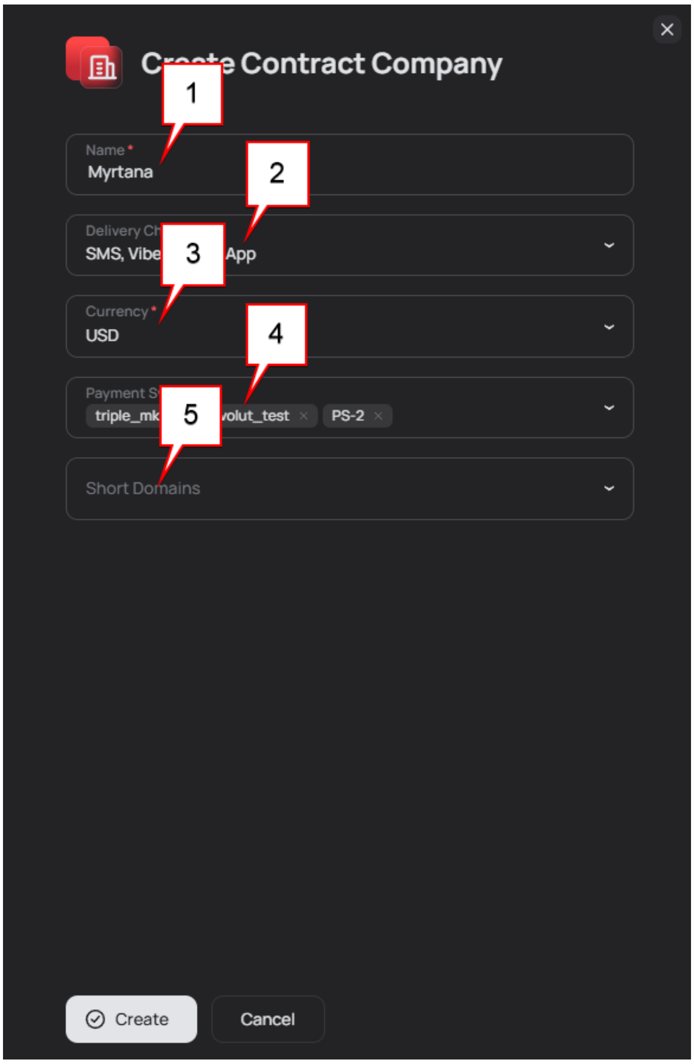


Contract companies

You can:

1. Search for a contract company by name.
2. Add a new contract company.

3. Edit or delete contract companies. To do this, click the context menu ⋮ and select the desired action.
4. View basic information about a contract company (available channels, currency, and payment systems).
5. View the number of partners.
   a. When you hover over the number, it highlights as a link; clicking it takes you to the Partners 37 interface with a filter pre-set for that specific contract company.
6. View the total revenue for the entire period.



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
3. Choose the currency
4. Choose the payment system
5. Specify the short domains that will be available for partners of this contract company

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. The newly created contract companies will be displayed in the list. The *Cancel* button serves to cancel the action.

All parameters are editable.

You cannot delete a contract company that has partners linked to it.

17.8 API Connections

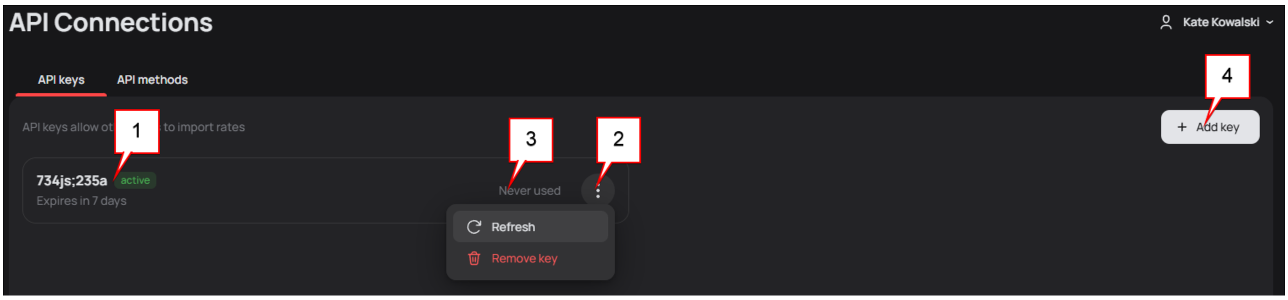
The *API Connections* interface is designed for defining the parameters for connecting to the platform in order to obtain the required information over API.

Bearer authorization with a JWT token is used for sending messages. How it works:

1. The user authenticates by providing a login and password in Basic (base64) format. The server returns a JWT token.
2. The JWT token is used to create API keys through the corresponding API request.
3. When an API key creation request is made, the server generates a unique JWT for that key. The key is a string used to authenticate requests to the platform.
4. The API key is passed in the header of each request (*Authorization: Bearer <API Key>*). The server verifies its validity and expiration.
5. When the key is used, its activity data is updated (for example, the time of last use).
6. When the key expires, it transitions to the *Expired* status. It can be refreshed to extend its validity period.
7. The key is displayed to the user only once upon creation.
8. Deleted or expired keys cannot be restored and must be recreated.

17.8.1 API keys

The *API Keys* tab is designed for managing API keys that allow integrated applications to send messages through the platform. API keys are used to authenticate requests, providing secure access to the service.



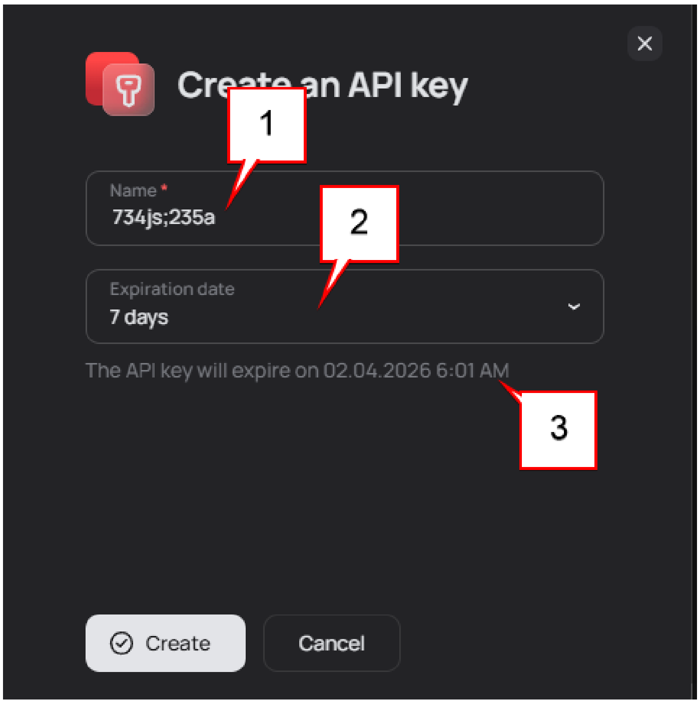
API Connections > API keys

You can:

1. View the name, status, and expiration date of an API key (*1 day*, *7 days*, *30 days*, *3 months*, *1 year*, *Never expires*).
2. Refresh or delete an API key:
   - *Refresh* — button for refreshing the key.

- *Remove key* — button for deleting the API key. Deletion occurs without confirmation.

3. View when the key was last used (if never used — *Never used*).
4. Click the *Add Key* button in the top right corner to add a new key.



Create an API key

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

1. Specify the key name (max 60 characters).
2. Specify the API key expiration date (available values: *1 day*, *7 days*, *30 days*, *3 months*, *1 year*, *Never expires*).
3. It is possible to view the calculated key expiration date.

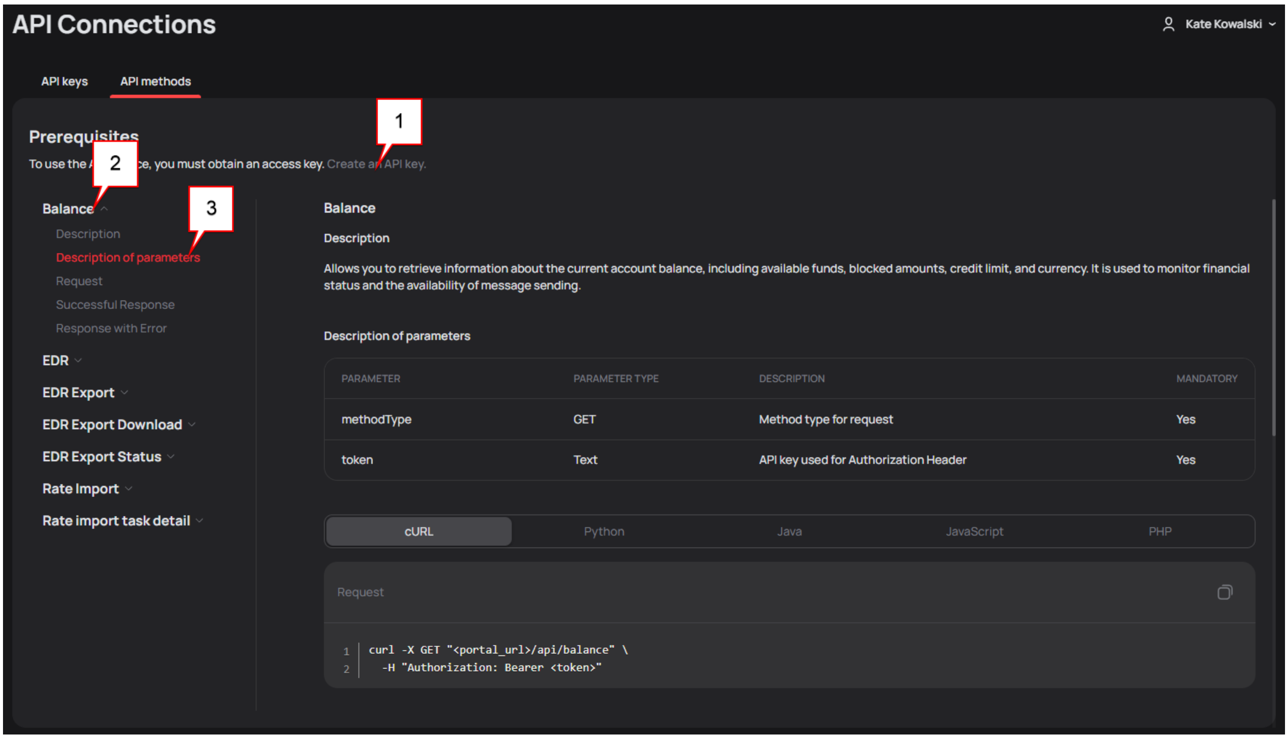
After filling in the parameters, click *Create:*

- When creating new keys, uniqueness is verified — the System does not allow two API keys with the same name.
- After clicking Create, the creation form closes, a record is added to the key list, and a window opens immediately displaying the generated key along with the following warning: *"Here is your new API key. This is the only time the key will ever be displayed! So keep it safe and make sure you've copied it down before closing this window."*

It is possible to close the window by clicking *Close*, or first click *Copy* to copy the API key. The *Cancel* button serves to cancel the action.

17.8.2 API methods

This reference tab displays information on how to use the API.



API Connections > API Methods

You can:

1. Click the *Create an API key* button to create a new API key.
2. Open a section with a description of a method.
3. Open a subsection with a detailed description of a method.

Currently, four API methods are supported: Import Rates 144, Balance 147, EDR 147, and EDR export 148.

The supported API methods are described in detail in this interface.

17.8.2.1 Import Rates

The method allows bulk uploading of rates to a vendor product and client subscription. Adding new rates, updating existing ones, and closing rates are all supported.

The key features of this mechanism are listed below.

- It supports rate uploads for both subscriptions and vendor products.
- It supports adding new rates and updating existing ones.
- The following rate types are supported:
    - Exact MCCMNC — rate for a specific network.
    - Any Network (MCC%) — wildcard rate for all networks within an MCC.
    - All Network (MCC) — aggregated rate per MCC.
- It supports mixed import (different rate types in a single file).

- It verifies the user's permission to import rates (edit products, edit subscriptions).
- The file format (csv, xlsx) and column order are uniform and strictly fixed for all import modes. The file must contain the following columns in the specified order:
  - *Vendor Product* or *Subscription*
  - *Start Date*
  - *End Date*
  - *Price*
  - *Rate Type*
  - *MCC*
  - *MNC*
  - *Traffic Type*
  - *Sender IDs*
  - *Country*
  - *Country Dial Code*

To determine what to do with the rates, the *mergeOption* parameter is provided, which is passed in the request body and can be either *update* or *close*. If the *mergeOption* parameter is not passed, *update* is used by default.

Rate import procedure over API:

1. Send the file to the server using *POST /rates/import*.
2. The API:
   - Validates the file structure for each row:
     - If Rate Type is not available, the error "*The Rate Type column is empty*" is shown
     - If MCC is empty, the error "*The MCC column is empty*" is shown
     - If Rate Type = EXACT and MNC is empty, the error "*The MNC column is empty*" is shown
     - If Rate Type = ALL and MNC is filled, the error "MNC must be empty for ALL rate type" is shown
     - If Rate Type = ANY and MNC is filled, the MNC value is ignored.
   - Defines the rate direction based on the *Rate Type* field value:

Rate Type	MCC in File	MNC in File	Result
EXACT	Required	Required	MCCMNC
ANY	Required	Ignored	MCC%

Rate Type	MCC in File	MNC in File	Result
ALL	Required	Ignored	MCC

- If the MCC is not available in the reference book:
  - The System will create two records before creating a rate:
    - MCC/Country/empty MNC/All networks
    - MCC/Country/MNC with the value %/Any networks

NOTE: The *Country* and *Country Dial Code* values are taken from the file to create the record. If the *Country* field is empty, the error "*The Country column is empty*" is shown. If the *Country Dial Code* field is empty, the error "The *Country Dial Code column is empty*" is shown.

- Applies logic based on the value of the passed *mergeOption* parameter:
  - *Update*: add new rates and update existing ones:
    - If the rate exists, its data is updated; otherwise a new one is created.
    - The *Start Date*, *End Date*, and *Price* values are subject to update in any combination.
    - If *Start Date* is empty, the current date and time are applied.
    - If *End Date* is empty, the *Never Expire* value is applied.
    - Closing rates is not supported in this mode.
  - *Close*: close rates only:
    - The rate must exist in the System.
    - No new rates are created.
    - The *Start Date* and *Price* field values are ignored in this mode and do not affect rate closure.
    - The rate is closed with the *End Date* specified in the file.
    - All subsequent rate periods are deleted.

IMPORTANT: If the System contains multiple rates for the same destination (same *Vendor Product /* Subscription and *MCCMNC*) but differing in *Traffic Type* and/or *Sender IDs*, then:

- Only the rate for which the *Traffic Type* and *Sender IDs* values exactly match the values in the file row is subject to update or closure.
- If no rate with a full match of identifying attributes is found for the file row:
  - In *mergeOption = update* mode, a new rate is created.
  - In *mergeOption = close* mode, the row is considered erroneous and processed with an *Error* status.

Import task status:

- It is possible to check the task status by sending a GET request to */v1/rates/import/{task_id}*. The response returns the current status:
    - *ERROR* — error during file generation.
    - *PENDING* — the rate import task is in progress or awaiting processing.
    - *SUCCESS* — the rate import task is complete.
    - *NEW* — new task, in queue, not yet started.
- Upon a successful status, the System also returns a rate import summary:
    - *Total rates*: total number of imported rates.
    - *New Rates*: number of rates with *New* status.
    - *Updated Rates*: number of rates with *Increase*, *Decrease*, or *Same* status.
    - *Closed Rates*: number of rates with *Closed* status.
    - *Error Rates*: number of rates with *Error* status.

17.8.2.2 Balance

The method allows Resellers and clients to request information about their balance.

Procedure for retrieving information over API:

1. Send a request to retrieve the current balance (*GET /balance*).
2. The API verifies the token, access rights, and compliance with the 1 request/sec limit.
3. If verification is successful, the API returns the balance:
    - Current available funds — the amount immediately available for sending messages.
    - Blocked funds — funds reserved for specific operations but not yet charged under the billing mode.
    - Balance currency.
    - Credit limit amount.
4. If verification fails, the API returns an error.

17.8.2.3 EDR

Procedure for retrieving EDRs over API:

1. Send a request to retrieve the EDR list (*GET /edr*), specifying the required date for data selection (*date* or *from/to* within one day) and pagination (*page*, *per_page*). Additional filters and sorting can be specified if needed.
2. The API verifies the token, access rights, correctness of the date filter (checking one calendar day before applying the time zone), presence and correctness of pagination and compliance with the 1 request/sec limit.
3. If verification is successful, the API returns a page of EDR records and pagination metadata (*total*, *pages*, *per_page*, *page*).
4. The data is processed and, if necessary, subsequent page requests are made until the entire selection is retrieved.

Limitations:

1. It is not possible to request data for multiple days or the entire period.
    - The request may cover only one calendar day.
        - A calendar day is defined as a date in the context of the request parameters passed (time zone is not taken into account at the validation stage):
            - Two alternative ways of specifying the date are supported:
                - *date=YYYY-MM-DD* (recommended)
                - By way of the *from* / *to* range:
                    - Both parameters must be specified simultaneously
                    - *from* and *to* must refer to the same calendar day
            - If the *from* / *to* parameters are passed without a time component, they are interpreted as a full day:
                - *from = YYYY-MM-DDT00:00:00*
                - *to = YYYY-MM-DDT23:59:59*
            - If a time component is specified:
                - It is taken into account during filtering
                - The one-calendar-day restriction still applies
2. If no date is specified, *from/to* refer to different calendar days, or more than one day is selected, an error is returned.

17.8.2.4 EDR Export

Procedure for exporting EDRs over API:

1. Send a request to create an EDR export task (*POST /v1/edr/export*). The request must include filter parameters, file format, the list of columns and the date range (similar to getting EDRs).
2. The API validates the request and returns the *export_id* and task status (*queued*).
3. Send a request to retrieve the task status (*GET /v1/edr/export/{export_id}*).
4. The API validates the request and returns the current status, row count, file size, and a download link if the file is ready. Statuses:
    - *WAITING* — task is in queue, not yet started.
    - *IN_PROGRESS* — task is being processed.
    - *READY* — file is ready, download link is available.
    - *FAILED* — error during file generation.
5. Send a request to download the file (*GET /v1/edr/export/{export_id}/download*).
6. If the task status is *READY*, the API returns the file (CSV/XLSX) or a *download_url*.