

BackOffice

BackOffice User's Guide

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Terms and Acronyms

1 Terms and Acronyms

Term	Definition
API	Application programming interface. The interface that controls the System functionality on the client side and is integrated with the client's systems.
Broadcast	One-way or two-way messaging campaign. In the latter case, it can be with a chatbot or a live person.
Client	A company or a private entrepreneur registered in the System that communicates with recipients from its own contacts database.
Communication channel	Channel available to users through the System interfaces that is used to deliver messages to recipients (SMS, WhatsApp, RCS etc.)
CTA	Call-to-action, a prompt on a button, message text or elsewhere that encourages the user to take some action such as call, visit the website etc.
Fallback	A way of sending messaging campaigns that allows redirecting a message to an alternative channel if it is not delivered through the initial channel within a predefined time period. The succession of channels and statuses that must be received for a message to be treated as delivered are configured by the user when setting up a campaign (broadcast).
MNO	Mobile network operator
OCS	Online charging system
RCS	Rich Communication Service, a communication protocol between mobile telephone carriers that is designed to replace traditional SMS messages and enables the exchange of video, audio, images and image carousels, group chats and other features.
RCS business messaging	Service that enables communication of businesses and their subscribers by way of RCS (in other words, A2P RCS).
RCS session	A series of messages grouped by certain criteria for billing purposes. A session can be defined by its length, direction of the initial message, the number of messages etc.

Terms and Acronyms

Term	Definition
Reselling	Capability to resell the System services that a company buys from its tenant, to other companies. A user that resells such services is called a reseller.
Sender ID	Alphanumeric sender identifier in a channel. It is set when creating a broadcast. Normally it coincides with the name of the brand that performs the communication.
System owner	Owner of the platform, a service provider that operates the System and connects clients (companies) that communicate with end-users.
Tenant	Upper-level reseller in relation to its sub-resellers.

System overview

2 System overview

The System is an omnichannel business messaging platform for brands and businesses. It allows businesses of any size and kind to talk with their customers through various communication channels.

The System allows communication:

- that can be initiated by the brand or the user;
- in regular SMS as well as through a variety of instant messengers;
- as a conversation with a chatbot or live operator or one-way interaction.

In other words, the System is a service delivery platform that offers its customers a versatile tool for interaction with end users by SMS and messengers.

Key benefits of the System include:

- Intuitive, top-notch interface with a rich set of instruments;
- Support of a variety of IM channels; new channels can be easily added;
- Feature rich Chatbot engine;
- Multichannel messaging campaigns (broadcasts);
- Operator workstation (chat panel) with support for all channels;
- In-depth analytics;
- Flexible rate plans;
- Integration with internal systems (such as CRM);
- No special skills needed to start working with the System - only basic computer competency.

2.1 System interfaces

The System consists of two interfaces:

- Client portal that serves for managing conversations and broadcasts.
- BackOffice: the admin interface that serves to configure all that is needed for operation of the System: System users, companies and their legal entities, manage invoices and payments etc.

NOTE: Both System interfaces operate in Google Chrome and Mozilla Firefox browsers. Operation in other browsers is possible but not guaranteed.

Typical System workflow

3 Typical System workflow

To start working with the System, follow the workflow detailed below.

1. Create a legal entity for your company in [Settings\Own legal entities](#) ^[203].
2. Create a company for your client in [Account management\Companies](#) ^[20].
3. Create a legal entity for the client's company in [Account management\Legal entities](#) ^[25].
4. Create an agreement for the client in [Account management\Agreements](#) ^[29].
5. Create a service in [Finance\Services](#) ^[101].
6. Assign the service to the agreement (use [Account management\Enabled services](#) ^[36] for pay-as-you-go rate plans and [Account management\Enabled packs](#) ^[38] for pack-based rate plans).

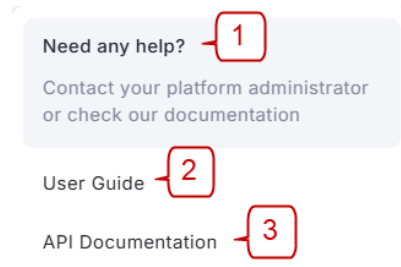
NOTE: For pack-based rate plans, also create a pay-as-you go service that will store prices for all packs in the same currency. For more detail, refer to [Finance\Services\Example 4. Creating a pack](#) ^[135].

7. Create and activate a Sender ID in [Account management\Sender IDs](#) ^[44].
8. Associate the Sender ID with the agreement in [Account management\Sender IDs](#) ^[44].
9. Create users for BackOffice (for your team), and a user for the Client portal in [Users](#) ^[151]. The Client portal user will then be able to create its own users in the Client portal.

Help window

4 Help window

Click on the  icon in the upper right corner of the screen to display the *Help* window. It serves to access the user documentation and contact the technical support of the upper-level partner.



The Help window

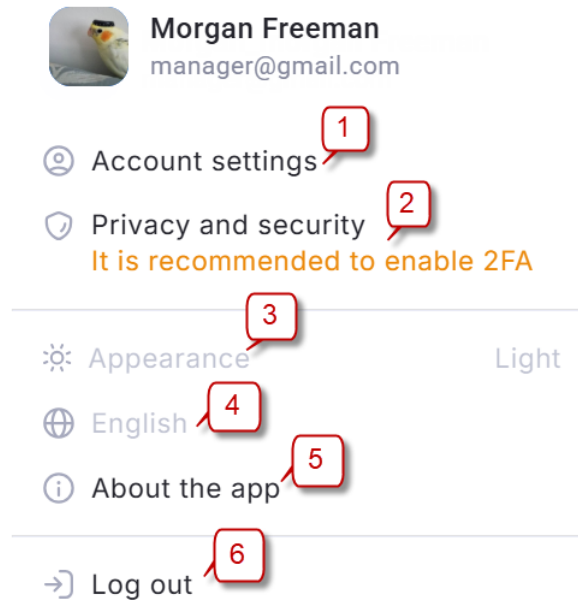
The pop-up window contains the following elements and controls:

1. *Need any help?* The upper-level partner's technical support mail address is displayed if Support Email field in the [Portals](#) 2501 interface is filled in.
2. *User Guide*: click to access the user documentation.
3. *API Documentation*: click to proceed to the API swagger documentation tab.

My account

5 My account

Click on the avatar  in the upper right corner of the screen to display account settings interface.



My account

It consists of:

1. *Account settings*: click to proceed to the [Account settings](#) ¹⁴ interface.
2. *Privacy and Security*: click to proceed to the [Privacy and Security](#) ¹⁵ interface.
3. *Appearance*: *Light theme*.
4. *Language*: *English*.
5. *About the App*: click to display a brief technical summary of the System version.
6. *Log out*: click to log out of the System.

My account

5.1 Account settings

The *Account settings* interface serves to configure parameters that store personal user information.

The screenshot shows the 'Account settings' page. At the top, there's a header 'Account settings'. Below it is a user profile section with an avatar (1), the name 'Morgan Freeman' (2), and the 'Account ID: 6' (3). The main content is divided into three sections: 'Basic information' (4), 'Contact information' (6), and 'Notification preferences' (7). The 'Basic information' section includes fields for 'Full name' (Morgan_morgan Freeman), 'Login' (backoffice-manager), 'Email' (manager@gmail.com), and 'Role' (ADMIN). The 'Contact information' section includes 'Company' (System owner) and 'Phone number' (79528809988). The 'Notification preferences' section has four toggle switches: 'Finance', 'Technical', 'Moderation', and 'Payments', all of which are currently turned on. A red box with the number 8 is placed over the 'Finance' toggle switch.

Account settings

The interface consists of the following elements:

1. *Avatar*: click on the avatar to upload a picture. If the user does not have an avatar set, the first letters of the user's first name and last name will be displayed in the avatar.
2. *Name*: user's first and last name.
3. *Account ID*: identification number of the user's account in the System.
4. *Basic information*:
 - *Full name*: user's first and last name.
 - *Login*: user's login.
 - *Email*: user's email.
 - *Role*: roles assigned to the user.

My account

5. Click to start editing info in the form that appears:

Edit name X

*First name
Morgan 13 / 60

*Last name
Freeman 7 / 60

Cancel Save

Edit form

- a. Edit the data as appropriate.
 - b. Click *Save* to save the settings or *Cancel* to discard the changes.
6. Contact information:
- *Company*: company the user is associated with.
 - *Phone number*: user's contact number.
7. Notification preferences:
- *Finance*: notifications about transactions and balances.
 - *Technical*: notifications about system errors and incidents.
 - *Moderation*: notifications about moderated entities and their statuses.
 - *Payments*: notifications about payments' status.
8. Select to enable notifications for the user.

5.2 Privacy and Security

The *Privacy and Security* interface serves to configure security settings like the user's password and two-factor authentication.

My account

Privacy and security

Log in to your account

We recommend to set a password periodically and enable two-factor authentication

1

2

3

4

Danger zone

Permanently delete account and all of its data. You will not be able to restore it

4

Privacy and Security

The interface consists of the following elements:

1. *Password*: user's password.
2. Click to change password.

Change password

a

b

c

d

e

Current password

.....

New password

.....

Confirm password

.....

Generate

Cancel

Save

Change password

- a. *Current password*: type in the password you would like to change.
- b. *New password*: type in your new password, or
- c. Generate a new strong password.

My account

- d. *Confirm password*: confirm your new password.
 - e. Click *Save* to save the settings or *Cancel* to discard the changes.
3. Select to enable *Two-factor authentication*. Add your phone number to get verification code in the form that appears or edit phone number if the *Two-factor authentication* has already been enabled.

Add phone number



This phone number will receive SMS or voice calls when authorizing in the application. After adding the number, all active user sessions will be terminated

*Phone number a

8 / 15b

Cancel

Get verification code

Add phone number

- a. *Phone number*: type in your phone number to get one-time verification code.
- b. Press *Get verification code* to save the phone number and get one-time code or *Cancel* to discard the settings.

Edit phone number



This phone number will receive SMS or voice calls when authorizing in the application

☐ 05380000000 a☒ Another phone number bc

Cancel

Get verification code d

Edit phone number

- a. Click to disable the phone number from two-factor authentication. In the form that appears press *Disable* to confirm the action or *Cancel* to close the form.



My account

 Disabling a phone number

This phone number will be disabled from two-factor authentication. SMS will no longer be sent to the current number. To re-enable two-factor authentication, enter a new phone number

[Cancel](#)[Disable](#)**Disabling a phone number**

- b. Select to enter another phone number that one-time codes will be sent to.
 - c. Type in the new phone number.
 - d. Press *Get verification code* to save the phone number and get one-time code or *Cancel* to discard the settings.
4. *Danger zone*: press *Delete account* to permanently delete the account. Type in your current password In the *Delete your account* form that appears and press *Continue*.

Delete your account?

This action cannot be undone. This will permanently delete your account and any subscriptions will be cancelled.

Enter your current password

 [Cancel](#)[Continue](#)**Delete your account (1)**

Type in delete-account in the corresponding field to confirm the deletion and press *Delete account* to permanently delete your account or *Cancel* if your thought better.



My account

Delete your account?



Are you sure you want to delete your account? To confirm, please type **delete-account** in the field below.

Delete accountCancel

Delete your account (2)



Account management

6 Account management

6.1 Companies

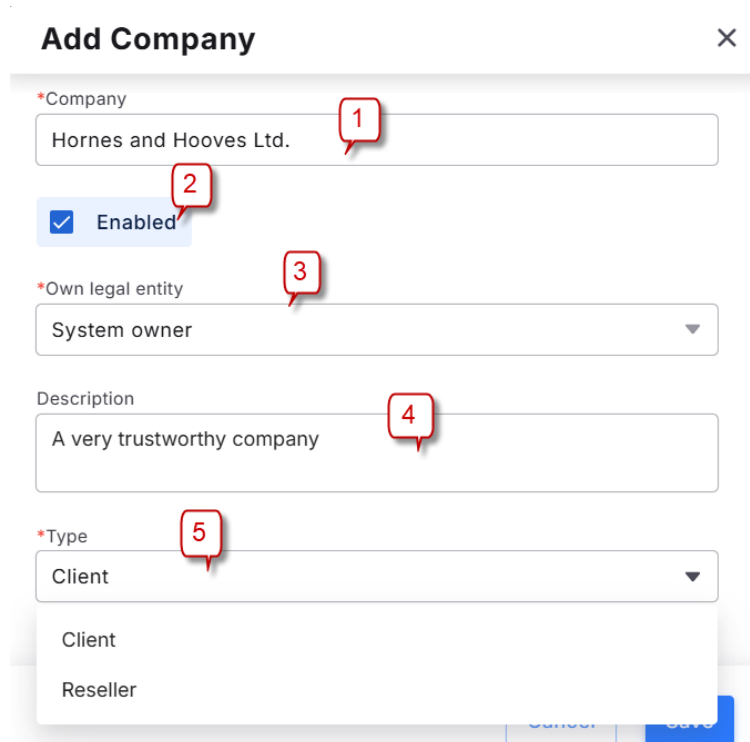
Companies are clients of the System Owner that use the platform for communicating with their customer base through conversations and broadcasts. The *Account management\Companies* interface is illustrated in the figure below.



Companies									
ID	Company	Own legal e...	Portal	Is reseller	Creator of r...	Moderation	Created	Updated	Actions
51	Telecom Monsters	Hornes&Hooves		false	false	false	10.07.2024	10.07.2024	
49	neww brand	System owner	Demo	false	false	true	14.06.2024	14.06.2024	
43	asap	System owner	Demo	false	false	false	19.01.2024	19.01.2024	
40	Hornes and Hooves	System owner	Demo	true	false	false	20.11.2023	20.11.2023	
39	Hornes and Hooves...	System owner	Demo	true	false	false	13.11.2023	13.11.2023	
38	Hornes and Hooves...	System owner	Demo	true	true	false	19.09.2023	19.09.2023	
36	Show_case2023	LE 4 test company		false	false	false	17.05.2023	18.09.2023	

Companies

1. Click to customize the display of columns.
2. Click *New company* to add a new company.
3. Click to view or edit the company profile.



Add Company

*Company

Hornes and Hooves Ltd.

☒ Enabled

*Own legal entity

System owner

Description

A very trustworthy company

*Type

Client

Client

Reseller

Cancel Save

Add Company (1)

Configure the following fields:

1. *Company*: the company name in the System.
2. *Enabled*: select the checkbox to give the company access to the interfaces.

Account management

3. *Own legal entity*: select the legal entity of the System owner.
4. *Description*: an arbitrary comment.
5. *Type*: Select *Client* or *Reseller*. A reseller sells the System services that its buys from its tenant, to other companies. Refer to [Reselling](#)^[256] for more detail.

NOTE: Resellers have access to both BackOffice and the Client Portal while Clients have access to the Client portal only.

✕

Add Company

***Type**

Reseller ▼

☒ Creator of resellers

☒ Invoices enabled

☒ MNP Requests

***MNP Connection**

VA ▼

***Channels**

SMS X
RCS X
Select...
☰

☒ Moderation

☒ Show credit limit

☒ Two Factor Authentication

Warning

When enabled, all users of the company will be set to 2FA and will need a phone number. If there is no phone number, authentication will not be possible.

Cancel
Save

Add Company (2)

6. *Creator of resellers*: select the checkbox to allow the company to create other companies with the *reseller* status. The control is displayed if *Type* = *Reseller*.
7. *Invoices enabled*: select to display the *Invoices* interface in the Client portal for the company's clients.

Account management

8. *MNP requests*: select to enable/disable MNP Server requests for the company. When not selected the MNP Server request for the company is not used.

NOTE: The control is displayed only in the tenant's interface.

9. *MNP connection*: select the MNP connection that will be used to send an MNP request.
10. *Channels*: the channels that MNP dipping will be applied to. The drop-down list contains all available channels and supports multiple channel selection.
11. *Moderation*: when selected, the chatbots and campaigns created by the company's users are sent to the System owner for moderation (see [Pre-moderation](#)^[248] for more detail).

NOTE: When the *Moderation* checkbox is selected, broadcasts will be sent for moderation only after the Client portal application has been updated. Client portal user can update the application by pressing the F5 function key.

12. *Show credit limit*: select the checkbox to display the credit limit in the *Balance* widget of the Client portal *Dashboard* interface. If the checkbox is not selected, the credit limit will be hidden.
13. *Two Factor Authentication*: select to require two-factor authentication for all users of the company.

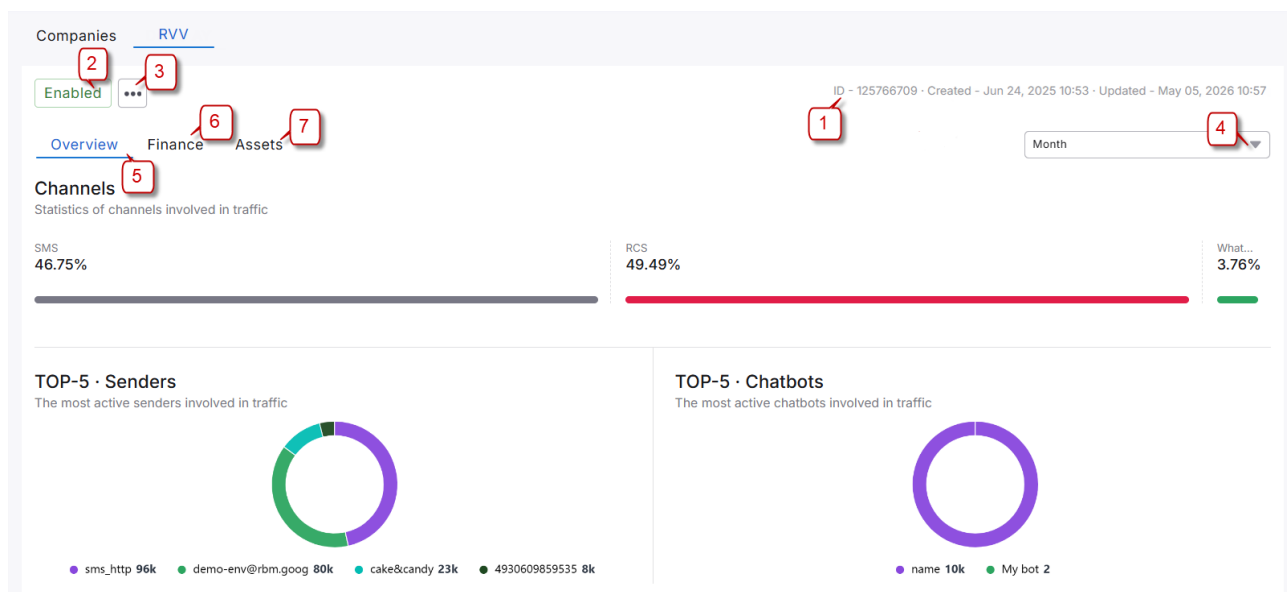
NOTE: A valid phone number must be specified in the user profile. Users having no such phone number not be able to access the System.

NOTE: If the *Two Factor Authentication* checkbox is disabled, the option can be enabled for individual users in [Users](#)^[151].

14. Click *Save* to save the record or *Cancel* to discard the settings.

6.1.1 Company profile

Click on a record in the table of companies or hover over *Actions* and click  to open the company profile page.



Viewing a company profile

1. The company ID that displays its creation and update time.

Account management

- Displays checked attribute(s) selected when creating the new company.
- Click to edit or block the company.



Edit/Block control

- Select the period to display the company statistics: *Day*, *Month* or *Year*.
- Overview* tab: the company overview, that contains statistics on the channels involved in the company traffic, the most active senders and chatbots.
- Finance* tab: the finance overview that contains information on the legal entities, agreements, finance operations related to the company (invoices and payments) and services enabled for the company.

Companies
RVV

Enabled
...

ID - 125766709 - Created - Jun 24, 2025 10:53 - Updated - May 05, 2026 10:57

Overview
Finance
Assets

Legal entity: RVV_2

31232521
0.00 EUR
Balance
Unlimited
Credit limit
Unlimited
Daily limit
Starts 26 Sep 2025
∞ (indefinitely)

30-06
-2.00 EUR
Balance
Unlimited
Credit limit
Unlimited
Daily limit
Starts 30 Jun 2025
Ends 05 Jul 2025

6324
-6.00 EUR
Balance
Starts 30 Jun 2025

Finance operations
Financial operations related to this company
Invoices
Payments

Services
Services connected to this company

Finance tab

- Assets* tab: contains conversation, content and WhatsApp templates created by users in the Client portal and available in the System. Click on the template in the table to preview it.

Account management

The screenshot shows the 'Companies' section with a sub-tab 'RVV'. Below it, there's a status 'Enabled' and a menu icon. The main content area has tabs for 'Overview', 'Finance', and 'Assets'. The 'Assets' tab is active, showing a table of templates. The table has columns for 'Name', 'Channel', and 'Updated'. The templates listed are for a 'Pizza Restaurant - New Pizza' across various channels (Email, WhatsApp, Viber, RCS, SMS) and two general templates ('welcome discount' and 'welcome'). To the right of the table, there's a preview of a WhatsApp message template for 'Pizza Restaurant - New Pizza (WhatsApp)' showing a pizza image and text: 'New pizza that will change the world', 'This time we've come up with something truly special.', and 'I want a slice!'.

Name	Channel	Updated
Pizza Restaurant - New Pizza (Email)	Email	27.06.2025 14:01:57
Pizza Restaurant - New Pizza (WhatsApp)	WhatsApp	27.06.2025 13:58:03
Pizza Restaurant - New Pizza (Viber)	Viber	27.06.2025 13:55:31
Pizza Restaurant - New Pizza (RCS)	RCS	27.06.2025 13:54:34
Pizza Restaurant - New Pizza (SMS)	SMS	27.06.2025 13:54:20
welcome discount	RCS	17.11.2024 19:21:52
welcome	RCS	17.11.2024 15:04:04

Assets tab

To edit a company, click *Edit* (3) as shown in the above picture. In the view window that appears, click *Edit*.

The 'View Company' modal form displays the following fields and controls:

- Company ID:** ID 6 (labeled 1)
- Company Name:** Demo AY
- Status:** ☒ Enabled
- Own legal entity:** System owner
- Description:** (Empty text area)
- *Type:** Client
- Actions:** Delete (labeled 4), Cancel (labeled 3), Edit (labeled 2)

View Company

1. Click on the company ID to view its creation and update time.
2. Click *Edit* to edit the record.
3. Click *Cancel* to close the tab or discard the changes.
4. Click *Delete* to delete the record.

Account management

Edit Company

ID 6

×

*Company

Demo AY

1

☒ Enabled

Own legal entity

System owner

Description

Enter description

*Type

Client

2

3

Delete

Cancel

Save

Edit Company

1. Edit the company profile as appropriate.
2. Click *Save* to save the settings or *Cancel* to close the tab or discard the changes.
3. Click *Delete* to delete the record.

6.2 Legal entities

Legal entities are entities of the company on behalf of which it works with its clients. A company (and the System owner) can have multiple legal entities. It may come instrumental when a brand has multiple legal entities, for example, one for each branch or currency it works with. This section serves to create legal entities for client companies. Legal entities for the System owner are created in [Settings\Own legal entities](#).

Legal entities										
ID	Name	Company	Count...	Portal	Legal address	Billing addre...	Legal comp...	Tax ID numb...	Legal ID nu...	VAT ID num...
41767752	alex_k_b2f_2	alex_k_b2f_2	American Samoa				alex_k_b2f_2			false
41767767	kiwi_lab	kiwi	Bosnia and Herzegovina				kiwi ab eff	55665	556	false
41767732	test_edrR	test_edrR	Brunei Darussalam				test_edrR			false
41768601	anbe_test	anbe_test	Canada				anbe_test			false
41767771	alex_k_b2f_4	alex_k_b2f_4	Cabo Verde				alex_k_b2f_4			false
41768597	countryids test 1	hir test123	Spain				123			false

Legal entities

1. Click to apply sorting or filters.
2. Click to customize the display of columns.
3. Click *Add legal entity* to add a new company.

Account management

Add Legal entity

14 X

*Name

Hornes and Hooves

*Company

AB For reselling

*Legal company name

Hornes and Hooves, Inc.

*Country

Canada

Portal

portal1

Tax ID number

123456

Legal ID number

654321

VAT ID number

7777777

Legal address

77 Barn str. NowHere

Billing address

77 Barn str. NowHere

Default notification emails

default@hoho.com

☐ Is Default

Cancel

Save

Adding legal entity

Configure the following fields:

1. *Name*: legal entity name.
2. *Company*: the company name in the System.

Account management

3. *Legal company name*.
4. *Country*: country of registration.
5. *Portal* (optional: it is created for a [reseller company](#)^[256] legal entity): select a portal created in [Portals](#)^[250]. If none are created, you can create and associate it with the legal entity later.
6. *Tax ID number*.
7. *Legal ID number*: registration number of the legal entity in the country of registration.
8. *VAT ID number*: ID for EU-registered companies.
9. *Legal address*: official registered address of a company or legal entity, as recorded in government registries.
10. *Billing address*: address associated with a company's financial transactions. May differ from the legal address.
11. *Default notification emails*: email of the user who will receive System event notifications.
12. *Is default*: default legal entity is selected by default in all legal entity entry forms.
13. Click *Save* to save the record or *Cancel* to discard the settings.
14. Click to close the form.

Click on a record in the table of companies to view the legal entity profile.

Account management

View Legal entity

ID 41768655×

1

Created: 2025 Aug 15 12:55:43
Updated: 2025 Aug 15 12:55:43
[Copy to clipboard](#)

Name

Hornes and H

Company

AB For reselling

Legal company name

Hornes and Hooves, Inc.

Country

Canada

Portal

portal1

Tax ID number

123456

Legal ID number

654321

VAT ID number

7777777

Legal address

77 Barn str. NowHere

Billing address

77 Barn str. NowHere

Default notification emails

default@hoho.com

☒ Is Default

2

Manage reselling agreements

5

Delete

4

Cancel

3

Edit

Viewing a legal entity profile

1. Click on the legal entity ID to view its creation and update time.

Account management

2. Click *Manage reselling agreements* to associate a legal entity with a reselling agreement as detailed in [Reselling\How to configure reselling\Associating legal entity with agreement.](#) ²⁵⁶
3. Click *Edit* to edit the record.
4. Click *Cancel* to close the tab or discard the changes.
5. Click *Delete* to delete the record.

6.3 Agreements

The *Account management\Agreements* page serves to create and manage agreements. An agreement stipulates conditions on which the System owner provides services to its client companies and resellers. Services and Sender IDs associated with the client company are connected to the agreement, as well as invoices and payments.

At least one agreement must be entered for each company. Each agreement represents a separate balance for System users. If a user has multiple agreements, the user will have as many balances.

Agreements can have multiple versions (see below).

ID	Company	Legal entity	Own legal entity	Bank account	Own bank acc...	Agreement code	Agreement date	Direction	Currency	Effective from	Effective till	Credit limit	Billing time zone	Billing period	Services ²	Packs ³
357	Telecom Mon...	Telecom Monste...	Homes&Hooves	UNKNOWN-58	UNKNOWN-57	12345	31.08.2025	CLIENT	EUR	04.09.2025	=	333	Africa/Abidjan	Monthly	No enabled services	No packs enabled
62	Telecom Mon...	Telecom Monste...	Homes&Hooves	UNKNOWN-58	UNKNOWN-57	NC-12345	01.07.2024	CLIENT	EUR	01.07.2024	=	=	Etc/GMT+3	Monthly	services 3	packs 1
56	asap	asap	System owner	UNKNOWN-53	UNKNOWN-1	123123	15.05.2024	VENDOR	EUR	15.05.2024	=	=	Africa/Abidjan	Monthly	No enabled services	No packs enabled
52	Homes and H...	Cats and dogs le...	System owner	UNKNOWN-49	UNKNOWN-55	12345	29.01.2024	CLIENT	EUR	29.01.2024	=	=	Africa/Abidjan	Daily	services 1	No packs enabled
51	Homes and H...	Reseller for Hom...	System owner	UNKNOWN-47	UNKNOWN-1	asap	18.01.2024	CLIENT	EUR	18.01.2024	=	5	Africa/Abidjan	Monthly	services 2	No packs enabled
50	Homes and H...	Reseller for Hom...	System owner	UNKNOWN-1	UNKNOWN-1	1009	21.11.2023	CLIENT	EUR	21.11.2023	=	=	Africa/Abidjan	Monthly	services 2	No packs enabled
46	Homes and H...	Homes and Ho...	System owner	UNKNOWN-46	UNKNOWN-1	0987	21.11.2023	CLIENT	EUR	21.11.2023	=	100	Africa/Abidjan	Monthly	No enabled services	No packs enabled
44	Demo AT	Acc_For_JRN	System owner	UNKNOWN-6	UNKNOWN-1	4321	13.11.2023	CLIENT	EUR	13.11.2023	=	=	Africa/Abidjan	Weekly	services 3	packs 1
42	Show_case20...	Show_case 1 leg...	LE 4 test company	UNKNOWN-41	UNKNOWN-1	1234	20.09.2023	CLIENT	EUR	23.09.2023	=	500	Africa/Abidjan	Daily	services 4	packs 2

Agreements

1. Click to customize the display of columns.
2. View the number of enabled services (click the link to open the [Account management\Enabled services](#) ³⁶ page).
3. View the number of enabled packs (click the link to open the [Account management\Enabled packs](#) ³⁸ page).
4. Click *New agreement* to add a new agreement.

Account management

6.3.1 Adding a new agreement

Add Agreement



*Company	1	Direction	2
DB		Client	
*Legal entity	3	*Own legal entity	4
zxcasd		AT_OLE1	
Bank account	5	*Own bank account	6
Select...		Select...	
*Agreement code	7	*Agreement date	8
123		26.04.2026	
*Currency	9		
EUR			
*Effective from	10		
27.04.2025		Europe/Zagreb	
*Effective till	11		
∞ (indefinitely)		Europe/Zagreb	

Add agreement (1)

1. *Company*: select the company name.
2. *Direction*: select *Client* (meaning the services are rendered by the System owner to its client). The *Vendor* direction is currently not available.
3. *Legal entity*: select the company's legal entity.
4. *Agreement code*: specify the agreement number.
5. *Own legal entity*: select the legal entity of the System owner.
6. *Bank account*: select the bank account of the System owner.
7. *Own bank account*: select the reseller's bank account.
8. *Agreement date*: specify the agreement date.
9. *Currency*: select the agreement currency.
10. *Effective from*: specify the agreement effective date and timezone.



Account management

11. *Effective till*: specify the agreement expiry date and timezone.

Add Agreement ×

Credit limit 12

Notification limits 13

Balance limit

Credit limit percent

Daily limit percent

Bundle limit percent

Invoicing

*Billing timezone 14

*Days for payment

*Billing period 15

*Billing day 16

☒ Split by month 17

Emails

Account emails

Payment alert emails

Service emails

Moderation alert emails

Cancel

Save 18

Add agreement (2)

12. *Credit limit*: specify the allowed credit limit. If left blank, the credit limit is unlimited.

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7

Account management

13. *Notification limits*: specify the limits that when reached will trigger notifications.
 - a. *Balance limit*: set an available balance limit. When the limit is reached, a notification is sent to the email address specified in the *Account emails* field.
 - b. *Credit limit percent*: specify a credit limit percentage. When the limit is reached, a notification is sent to the email address specified in the *Account emails* field.
 - c. *Daily limit percent*: specify a daily limit percentage. When the limit is reached, a notification is sent to the email address specified in the *Account emails* field.
 - d. *Bundle limit percent*: specify a bundle pack usage limit percentage. When the limit is reached, a notification is sent to the email address specified in the *Account emails* field.
14. *Billing timezone: Days for payment*: specify the timezone for billing and the number of days during which the company can pay the invoice without penalty.
15. *Billing period: Billing day*: specify the billing period (*Daily, Weekly, Monthly* or *Quarterly*) and the day on which the invoice must be issued.
16. *Split by month* (available when *Daily* or *Weekly* are selected): when enabled, it allows splitting the billing period in two if it falls between months (for example, if a weekly period starts on 29 September and ends on 5 October, it will be split in two - one from 29 till 30 September and the other from 1 till 5 October).
17. *Emails*: specify emails for various types of notifications. The following fields are available in this section:
 - a. *Account emails*: the address for sending account notifications - for example, on account registration and activation.

NOTE: Notifications that inform clients about problems with sending or a complete lack of traffic are sent to the address(es) specified in the *Account emails* field.

- b. *Payment alert emails*: the address(es) for payment alerts.
 - c. *Service emails*: the address for sending technical notifications.
 - d. *Moderation alert emails*: the address for sending moderation notifications.
18. Click *Save* to save the record or *Cancel* to discard the settings.

Account management

6.3.2 Editing an agreement

To edit an agreement, double click on its record in the table. In the view window that appears, click *Edit*.

View Agreement ID 2445 ×

Services enabled

Company KIWI2	Agreement code 555-8	Direction ↓ Client
Legal entity KIWI2	Agreement date 02.03.2026	Currency \$ USD
Own legal entity System owner	Bank account	Own bank account Main EUR Account, Corporate

[Delete version](#) [Cancel](#) [Edit](#)

View Agreement

1. Click on the agreement ID to view its creation and update time.
2. Click *Services enabled* to view the enabled services as detailed below.

Services enabled

ID	Service	Service type	Connection Date	Effective from	Effective till	
6839	EUR Packs	Pay-as-you-go	14.04.2026 12:18:49	14.04.2026 12:18:49	∞ (indefinitely)	×

Enabled services

1. *ID*: Identification number of the service.
2. *Service*: the name of the service.
3. *Service type*: pay-as-you-go.
4. *Connection date*: the connection date of the service.
5. *Effective from*: the effective date of the service in the specified timezone.
6. *Effective till*: the expiry date of the service in the specified timezone.
7. Click to close the view window.

NOTE: Some Agreement fields are not editable.

It is also possible to create agreement versions. This may come instrumental if agreement terms such as credit limit or invoicing details change over time.

Click *Add new version*. Edit the parameters in the sections: *Version*, *Credit limit* and *Invoicing*. Click *Save*.

Account management

To view, edit and delete agreement versions, open the agreement for editing, expand the *Version* list as shown in the figure below and select a version.

NOTE: Select a past version to view the terms and conditions of this version.

Account management

Edit Agreement ID 2445

Services enabled

Company	Agreement code	Direction
KIWI2	555-8	↓ Client
Legal entity	Agreement date	Currency
KIWI2	02.03.2026	\$ USD
Own legal entity	Bank account	Own bank account
System owner		Main EUR Account, Corporate

Credit limit

Edit

unlimited

Notification limits

Edit

Balance limit

Credit limit percent

Daily limit percent

Bundle limit percent

Version

01.04.2026 - Indefinitely (ID 2586) - curre▼

[Add new version](#)

01.04.2026 - Indefinitely (ID 2586) - current

02.03.2026 - 01.04.2026 (ID 2428) - expired

*Effective from

Delete version

Cancel

Save

Select a version

To delete a version, select *Delete this version*.



Account management

NOTE: Versions with the effective date that is less than the current date can not be deleted as well as an only version of the agreement even if its effective date is set in the future.

6.4 Enabled services

The *Account management\Enabled services* interface serves to associate available services, packs, bundle initiators and bundle packs (created in [Finance\Services](#)^[101]) to an agreement. Once an enabled service, pack, bundle initiator or bundle pack is created, it means that the System user has purchased the service, even if its *effective from* date is in the future.

The *Account management\Enabled services* interface consists of four tabs: *Enabled services*, *Enabled packs*, *Enabled bundle initiators* and *Enabled bundle packs*.

6.4.1 Enabled services

Services are rate plans for messaging and other services offered to clients on a pay-as-you-go basis. In the *Account management\Enabled services\Enabled services* interface the user can associate available packs (created in [Finance\Services](#)^[101]) to an agreement.

Enabled services				Columns	+ Add enabled service
ID	Company	Agreement	Service	Effective from	Effective till
283	Hornes and Hooves	1029 (EUR)	Bundle_price	03.07.2025 14:34	=
207	Demo AY	emul_Agreement (EUR)	WhatsApp default	25.12.2024 11:30	=
206	Demo AY	emul_Agreement (EUR)	WhatsApp CBP default	25.12.2024 11:30	=
178	Demo AY	ACILFORLNN (EUR)	Additional	16.12.2024 10:51	=
145	Demo AY	ACILFORLNN (EUR)	Telegram	16.12.2024 10:26	=
144	Hornes and Hooves Ltd	1234 (EUR)	Additional services	04.12.2024 18:38	=
143	Telecom Monsters	NC-12345 (EUR)	Additional services	05.12.2024 00:31	31.12.2024 06:00
59	Telecom Monsters	NC-12345 (EUR)	Training pay-as-you-go	10.07.2024 16:34	=
58	Telecom Monsters	NC-12345 (EUR)	RCS default	10.07.2024 16:19	=
57	Hornes and Hooves	1029 (EUR)	RCS default	30.01.2024 16:53	=
56	example1	12345 (EUR)	WhatsApp CBP default	29.01.2024 10:17	=

Enabled services

1. Click to customize the display of columns.
2. Hover over the column header and click to apply filter. This functionality is available for all tabs.
3. Click to clear filters.
4. Click *Add enabled service* to make a new service-to-agreement association.

Add Enabled services

*Service

EUR Packs

*Agreement

Hornes and Hooves Ltd - 1234, EUR

*Effective from

25.12.2024, 13:05:00

Timezone

Etc/GMT +00:00

Effective till

25.12.2025, 13:05:00

Timezone

Africa/Abidjan +00:00

☒ Do not show to client

Cancel

Save

Add Enabled services

1. *Service*: select the service.

Account management

2. *Agreement*: select the agreement with which the service must be associated.

NOTE: If both a regular (pay-as-you go) service and a pack are associated with one and the same agreement, the pack will be used first, and then the pay-as-you go service.

3. *Effective from*: specify the effective date and timezone for the association. The *Effective from* date is the date of the service purchase.
4. *Effective till*: specify the expiry date and timezone.
5. Select if you do not want to show this service to the client.
6. Click *Save* to save the record or *Cancel* to discard the settings.

NOTE: The user cannot enable two pay-as-you-go services active with an overlapping effective period, to the same channels. Check that such services do not overlap.

Click on the record in the table to view and edit the service.

View Enabled services ID 207

Service
WhatsApp default

Agreement
Demo AY - emul_ Agreement, EUR

*Effective from 25.12.2024, 08:30:16 Timezone Etc/UTC

Effective till ∞ (indefinitely) Timezone Africa/Abidjan

☐ Do not show to client

Cancel Edit

3

1

2

View Enabled services

1. Click *Edit* to start editing the service.
2. Click *Cancel* to close the form.
3. Click to close the form.

Account management

Edit Enabled services ID 207

***Service**
WhatsApp default

***Agreement**
Demo AY - emul_ Agreement, EUR

***Effective from** 25.12.2024, 08:30:16 **Timezone** Etc/UTC

Effective till ∞ (indefinitely) **Timezone** Africa/Abidjan

☒ Do not show to client

1 **2** **3**

Cancel Save

Edit Enabled services

1. Edit the information in the fields available for editing.
2. Click *Save* to save the changes or *Cancel* to discard the settings.
3. Click to close the form.

6.4.2 Enabled packs

Packs are pack-based services offered to clients. In the *Account management\Enabled services\Enabled packs* interface the user can associate available packs (created in [Finance\Services](#)) to an agreement.

Enabled services							
Enabled packs		Enabled bundle initiators		Enabled bundle packs			
ID	Agreement	Service	Company	Cost	Currency	Effective from	Effective till
42	1234 (EUR)	1 EUR on Messages - Welcome Bonus	Homes and Hooves Ltd			23.09.2023 00:00	26.09.2023 00:00
43	emul_ Agreement (EUR)	1000 EUR on RCS - Economy Pack	Demo AY			24.09.2023 17:00	30.09.2023 00:00
45	1234 (EUR)	Pack for Petshop	Homes and Hooves Ltd			08.11.2023 13:20	-
50	4321 (EUR)	Pack for reseller 100 000	Homes and Hooves Reseller Company			22.11.2023 14:13	-
60	NC-12345 (EUR)	Training pack	Telecom Monsters	40.00	EUR	10.07.2024 16:34	-

Enabled packs

1. Click to customize the display of columns.
2. Click *Add enabled pack* to make a new pack-to-agreement association.

Account management

The screenshot shows a form titled "Add Enabled pack" with a close button (X) in the top right corner. The form contains the following fields and options:

- *Service (pack)**: A dropdown menu showing "1 EUR on Messages - Welcome Bonus". A red callout box with the number "1" points to this field.
- *Agreement**: A dropdown menu showing "Hornes and Hooves Ltd - 1234, EUR". A red callout box with the number "2" points to this field.
- *Effective from**: A date and time field showing "31.12.2024, 00:00:00". A red callout box with the number "3" points to this field.
- Timezone**: A dropdown menu showing "Etc/GMT +00:00". A red callout box with the number "3" points to this field.
- Effective till**: A date and time field showing "∞ (indefinitely)". A red callout box with the number "4" points to this field.
- Timezone**: A dropdown menu showing "Africa/Abidjan +00:00". A red callout box with the number "4" points to this field.
- *Billing**: Two radio button options: "Free of charge" (selected) and "Charge". A red callout box with the number "5" points to the "Free of charge" option.
- Buttons**: "Cancel" and "Save" buttons. A red callout box with the number "6" points to the "Save" button.

Add Enabled pack

1. *Service (pack)*: select the pack.
2. *Agreement*: select the agreement with which the pack must be associated.

NOTE: If both a regular (pay-as-you go) service and a pack are associated with one and the same agreement, the pack will be used first, and then the pay-as-you go service.

3. *Effective from*: specify the effective date and timezone for the association. The *Effective from* date is the date of the pack purchase, when its cost is written off the user's account.
4. *Effective till*: specify the expiry date and timezone.
5. *Billing*: select *Free of charge* for a free pack and *Charge* for a billable pack. If *Charge* is selected, the pack's cost will be displayed.

NOTE: Along with the pack itself, one more service must be created for billable packs, that will store prices for all packs in the same currency. It must be added as an enabled service in [Account management\Enabled services](#)^[36] and associated to the agreement. For detailed instructions on creating a billable pack, refer to [Finance\Services\Example 4. Creating a pack](#)^[135]. No additional service is needed for a free pack.

NOTE: The the pack's cost will be shown if a) the service Scope is not in the *Draft* status (refer to [Finance\Services\Creating a service](#)^[102]) b) the pack is effective as of the current date c) the pay-as-you-go service mentioned in the previous **NOTE** is also effective as of the current date.

6. Click *Save* to save the record or *Cancel* to discard the settings.

NOTE: If two or more packs for the same channel (resource) are associated with one and the same agreement, the one associated earlier will be used first.

Click on the record in the table to view and edit the pack.

Account management

View Enabled pack ⓘ ID 45 3 ✕

Service (pack)
Pack for Petshop

Agreement
Hornes and Hooves Ltd - 1234, EUR

*Effective from ⓘ Timezone
08.11.2023, 10:20:19 ⓘ Etc/GMT

Effective till ⓘ Timezone
∞ (indefinitely) ⓘ Africa/Abidjan 1

2 Cancel Edit

View Enabled pack

1. Click *Edit* to start editing the pack.
2. Click *Cancel* to close the form.
3. Click to close the form.

Edit Enabled pack ⓘ ID 45 3 ✕

*Service (pack)
Pack for Petshop

*Agreement
Hornes and Hooves Ltd - 1234, EUR

*Effective from ⓘ Timezone
08.11.2023, 10:20:19 ⓘ Etc/GMT

Effective till ⓘ Timezone
∞ (indefinitely) ⓘ Africa/Abidjan 2

1 Cancel Save

Edit Enabled pack

1. Edit the information in the fields available for editing.
2. Click *Save* to save the changes or *Cancel* to discard the settings.
3. Click to close the form.

Account management

6.4.3 Enabled bundle initiators

Bundle initiators are resource plans for bundle packs. In the *Account management\Enabled services\Enabled bundle initiators* interface the user can associate available bundle initiators (created in [Finance\Services](#)^[101]) to an agreement.

Enabled services	Enabled packs	Enabled bundle initiators	Enabled bundle packs						
ID	Company	Agreement	Service	Effective from	Effective till				
1274	Demo Orange 1	qwe-qwe (EUR)	LA Bundle Initiator	22.01.2025 01:00	24.01.2025 01:00				
1275	Demo Orange 1	qwe-qwe (EUR)	LA Bundle Initiator	22.01.2025 01:00	24.01.2025 01:00				
1276	Demo Orange 1	LA active agreement (USD)	LA Bundle Initiator	25.01.2025 13:00	30.01.2025 16:00				
1280	Demo Orange 1	qwe-qwe (EUR)	Bundle Initiator LA	23.01.2025 01:00	31.01.2025 01:00				
1292	DIO_company	VA_DIO_agreement (EUR)	Bundle Initiator LA	27.01.2025 08:00	28.01.2025 08:00				
1293	HarryPotter	456 (EUR)	Bundle Initiator LA	27.01.2025 08:00	28.01.2025 08:00				
1298	VA_sereg_2b	VA-2024-10-16-125766270 (EUR)	VA_bundle_initiator	28.01.2025 00:00	01.01.2030 00:00				
1300	VA_123456_reg	VA-2024-10-16-125766269 (EUR)	VA_bundle_initiator	28.01.2025 00:00	01.01.2030 00:00				
1307	Demo Orange 1	LA active agreement (USD)	LA Bundle Initiator	27.02.2025 01:00					

Enabled bundle initiators

1. Click to customize the display of columns.
2. Click *Add enabled bundle initiator* to make a new bundle initiator-to-agreement association.

Add Enabled bundle initiator

*Service (pack)

Bundle initiator LA

*Agreement

0307 - VA-2025-07-01-125766717, EUR

*Effective from

13.07.2025, 00:00:00

Effective till

∞ (indefinitely)

☒ Do not show to client

Cancel

Save

Add Enabled bundle initiator

1. *Service (pack)*: select the bundle initiator.
2. *Agreement*: select the agreement with which the bundle initiator must be associated.
3. *Effective from*: specify the effective date and timezone for the association. The *Effective from* date is the date of the bundle initiator purchase, when its cost is written off the user's account.
4. *Effective till*: specify the expiry date and timezone.
5. Select if you do not want to show this service to the client.
6. Click *Save* to save the record or *Cancel* to discard the settings.

Click on the record in the table to view and edit the bundle initiator.

Account management

View Enabled bundle initiator ID 1379

Service (pack)
Bundle_1

Agreement
VA_selreg_2b - Bundle_22, EUR

*Effective from ⓘ
13.03.2025, 00:00:00

Effective till ⓘ
∞ (indefinitely)

☐ Do not show to client

3 **1** **2**

Cancel Edit

View Enabled bundle initiator

1. Click *Edit* to start editing the bundle initiator.
2. Click *Cancel* to close the form.
3. Click to close the form.

Edit Enabled bundle initiator ID 1379

*Service (pack)
Bundle_1

*Agreement
VA_selreg_2b - Bundle_22, EUR

*Effective from ⓘ
13.03.2025, 00:00:00

Effective till ⓘ
∞ (indefinitely)

☐ Do not show to client

1 **2** **3**

Cancel Save

Edit Enabled bundle initiator

1. Edit the information in the fields available for editing.

Account management

- Click *Save* to save the changes or *Cancel* to discard the settings.
- Click to close the form.be used first.

6.4.4 Enabled bundle packs

Bundle pack is a set of pack-based services offered to clients. In the *Account management\Enabled services\Enabled bundle packs* interface the user can associate available bundle packs (created in [Finance\Services](#)) to an agreement.

Enabled services	Enabled packs	Enabled bundle initiators	Enabled bundle packs					Columns	+ Add enabled bundle pack
ID	Company	Agreement	Service	Used	Effective from	Effective till			
1297	VA_selreg_2b	VA-2024-10-16-125786270 (EUR)	VA_bundle_pack_10	15/10	28.01.2025 14:13	01.02.2025 03:00			
1299	VA_123456_reg	VA-2024-10-16-125786269 (EUR)	VA_bundle_pack_10		28.01.2025 15:42	29.01.2025 03:00			
1308	VA_regself_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		28.01.2025 16:48	29.01.2025 03:00			
1310	VA_regself_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		29.01.2025 03:00	30.01.2025 03:00			
1311	VA_regself_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		30.01.2025 03:00	31.01.2025 03:00			
1312	VA_regself_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		31.01.2025 03:00	01.02.2025 03:00			
1314	VA_selreg_2b	VA-2024-10-16-125786270 (EUR)	Telegram bundle pack		30.01.2025 12:24	01.02.2025 03:00			
1316	VA_selreg_2b	VA-2024-10-16-125786270 (EUR)	VA_bundle RCS_pack		30.01.2025 13:21	01.02.2025 03:00			
1317	VA_123456_reg	VA-2024-10-16-125786269 (EUR)	VA_bundle RCS_pack		30.01.2025 13:29	31.01.2025 03:00			

Enabled bundle packs

- Used*: bundle pack unit counter.
- Click to customize the display of columns.
- Click *Add enabled bundle pack* to make a new bundle initiator-to-agreement association.

Add Enabled bundle pack

*Service (pack)

6266_bundle pack

*Agreement

VA_company - VA_chan_bil_TZ, EUR

Cancel

Save

Add Enabled bundle pack

- Service (pack)*: select the bundle pack.
- Agreement*: select the agreement with which the bundle pack must be associated.
- Click *Save* to save the record or *Cancel* to discard the settings.

Click on the record in the table to view the bundle pack.

Account management

View Enabled bundle pack

ID 1306

X

Service (pack)

VA_bundle_pack_10

Agreement

VA_regself_3 - VA-2024-10-16-125766266, EUR

☐ Auto extend

1

Cancel

Edit

View Enabled bundle pack

1. *Auto extend*: select to ensure automatic renewal of the pack for future billing periods.

NOTE: The bundle pack validity dates are associated with the billing period of the corresponding agreement.

6.5 Sender IDs

The *Account management\Sender IDs* interface serves to register Sender ID records in the System. Each communication channel (SMS, Viber, WhatsApp etc.) requires creation of a dedicated Sender ID. The System provides a configuration for sending notifications about traffic malfunctioning (messages fail to send or there is no traffic) to the System owner.

Before creating a record, check that the following has been done:

1. A connection has been configured in [Settings](#) ¹⁷⁹.
2. All the required configurations have been made on the side of the service provider that supplies Sender IDs.

ID	Company	Channel	Sender ID	Name	Status	Webhook...	Agreement	Vendor ...	Created	Updated	Actions
524	Demo AY	TTS	VoiceTTS	VoiceTTS	ACTIVE		ACC_FOR_NN (...)	Asterisk	15.10.2025	15.10.2025	
522	Demo AY	WeChat	wechat	WeChat	ACTIVE	19fe1ce8-e4f...	ACC_FOR_NN (...)	WeChat	07.10.2025	07.10.2025	
521	Demo AY	Voice	Voice	Voice	ACTIVE		ACC_FOR_NN (...)	Asterisk	07.10.2025	07.10.2025	
516	Demo AY	TTS	TTS	TTS	ACTIVE		ACC_FOR_NN (...)	Asterisk	04.10.2025	04.10.2025	
377	Demo AY	SMS	VasTelecom	VasTelecom	ACTIVE		emul_Agreeme...	SMPP	09.01.2025	09.01.2025	
376	Demo AY	SMS	smpp_em	SMS_sm_em	ACTIVE		emul_Agreeme...	SMPP	25.12.2024	06.10.2025	
284	Demo AY	WhatsApp	WA_g	WA_g	DRAFT		emul_Agreeme...	Gupshup	13.12.2024	06.10.2025	
283	System owner	SMS	Self_registratio...	Self_registratio...	ACTIVE			HTTP	11.11.2024	11.11.2024	

Sender IDs

To create a new Sender ID record, click *New sender*. In the panel that appears, select the communication channel (*SMS, RCS, Viber, WhatsApp, WeChat, Email, Telegram Gateway, Push, TTS, Voice, Mobile Push* and *FlashCall*) and click *Apply*.

Account management

New sender ×

- ☒ SMS
- ☐ RCS
- ☐ Viber
- ☐ WhatsApp
- ☐ WeChat
- ☐ Email
- ☐ Telegram Gateway
- ☐ Telegram
- ☐ Push
- ☐ TTS
- ☐ Voice
- ☐ Mobile Push
- ☐ FlashCall

Apply

New sender

Hover over a record to display the controls for handling the Sender ID setup fee and usage fee as shown in the figure below.

Sender IDs											+ New sender
ID	Company	Channel	Sender ID	Name	Status	Webhoo...	Agreement	Vendor ...	Created	Updated	Actions
525	Demo AY	WhatsApp	995597975687	Telin	ACTIVE	f764fd9e-79c...	ACC_FOR_NN (...)	Telin	10.11.2025	10.11.2025	
524	Demo AY	TTS	VoiceTTS	VoiceTTS	ACTIVE		ACC_FOR_NN (...)	Asterisk	15.10.2025	15.10.2025	
522	Demo AY	WeChat	wechat	WeChat	ACTIVE	19fe1ce8-e4f...	ACC_FOR_NN (...)	WeChat	07.10.2025	07.10.2025	
521	Demo AY	Voice	Voice	Voice	ACTIVE		ACC_FOR_NN (...)	Asterisk	07.10.2025	07.10.2025	
516	Demo AY	TTS	TTS	TTS	ACTIVE		ACC_FOR_NN (...)	Asterisk	04.10.2025	04.10.2025	
377	Demo AY	SMS	VasTelecom	VasTelecom	ACTIVE		emuL_Agreeme...	SMPP	09.01.2025	09.01.2025	

Sender ID setup and usage fees

The  control serves to apply the Sender ID registration fee. It must be applied AFTER a service containing the setup fee is configured (refer to [Finance/Services/Creating a service](#)¹⁰² for more detail).

Account management

The  control serves to configure rules for applying Sender ID usage fees. Click  to open the periodic fee rules window illustrated below. It must also be configured AFTER the relevant service containing the usage fee is created, otherwise the fee may not be written off correctly.

Sender ID 1221 - periodic fee rules ×

 **Add** 1

Effective from 2
28.03.2024 

Effective till
∞ (indefinitely) 

Period properties 3

Charge every
☒ month
☐ week

Start day
1 

Charge, day(s) beforehand 4
1

On failure 5

Retry every hour(s)
1

Max retries
3

Sender ID properties 6

Sender ID type
☒ Alphanumeric
☐ Short code
☐ Long code 7

MNO 8
BT 

✓ 500.00 EUR
Effective: 01.01.2000 03:00:00

Cancel Save 9

Sender ID periodic fee rules

1. Click *Add* to add a new rule.
2. Set the rule's validity period.
3. Define the period properties: how often the fee must be charged (monthly or weekly), and set the start day of the period.
4. *Charge, day(s) beforehand*: set the number of days before the period start when the fee must be charged.
5. Set the periodicity of charge retries and the maximum number of retries.
6. Select the Sender ID type (*Alphanumeric*, *Short code* or *Long code*).
7. View the fee amount and its effective date (the fee is configured in [Finance\Services\Creating a service](#)¹⁰²⁾). If it is highlighted in green, it means that an effective rate has been found; otherwise it will be highlighted in red.
8. *MNO*: select the mobile operator to which the Sender ID is assigned.
9. Click *Save* to save the changes.

Account management

6.5.1 SMS Sender IDs

To create an SMS Sender ID, select *SMS* in the *New sender* form and proceed as follows.

The screenshot shows the 'Add Sender' form with the following fields and callouts:

- 1: *Sender ID (text input: HornesHooves)
- 2: *Name (text input: Hornes and Hooves)
- 3: *Company (dropdown: VVA)
- 4: *Agreement (dropdown: 123, EUR)
- 5: *Status (dropdown: Active)
- 6: Webhook GUID (text input: Enter value, with a generate icon)
- 7: MCC (text input: 214)
- 8: Webhook URL (text input: Enter value)
- 9: WebHook SMPPAPI Connection (dropdown: Enter value)
- 10: Keyword (text input: Enter value)
- 11: *Vendor type (dropdown: SMPP)
- 12: *Connection (dropdown: 1231 (enabled))
- 13: Service type (text input: Enter value)
- 14: ☒ Notification settings
- 15: *Trigger percent (text input: 60)
- 16: *Minimal message count for starting detecting (text input: 40)
- 17: *Window size (text input: 20)
- 18: Cancel and Save buttons at the bottom right.

Add Sender (SMS)

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID* (optional): a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *MCC* (optional): enter the MCC to define the country in which the short code is used (for two-way messages that are sent to short codes).
8. *Keyword*: enter a keyword supplied by your service provider (for two-way messages that are sent to shared short codes).
9. *WebHook SMPPAPI Connection*: uniquely identifies the Sender ID when connecting to SMPP API.

Account management

10. *WebHook URL*: the URL that you can send an API request to in order to notify the user that a certain event has occurred. It is supplied by your service provider.
11. *Vendor type*: select the connection type (*HTTP* or *SMPP*).
12. *Connection* (available if *SMPP* is selected in the *Vendor type* field): select a connection created in [Settings\Vendors SMPP connections](#) ¹⁷⁹.
13. *Service type* (available if *SMPP* is selected in the *Vendor type* field): currently out of use.
14. *Notification settings*: checkbox for traffic monitoring notifications.
15. *Trigger percent*: threshold error rate that triggers notifications.
16. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
17. *Window size*: the size of the time window (minutes) to consider for the statistics count.
18. Click *Save* to save the changes or *Cancel* to discard the settings.

If *Vendor type*=*HTTP*, the following additional fields are available:

*Login 1 HoHo	*Password 2 12345
Service type Enter value	*Connection Enter value

HTTP settings

1. *Login*: the credentials supplied by your service provider.
2. *Password*: the credentials supplied by your service provider.

Account management

6.5.2 RCS Sender IDs

To create an RCS Sender ID, select *RCS* in the *New sender* form and proceed as follows.

Add Sender

*Company (1): Hornes and Hooves

*Agreement (2): 1029, EUR

*Channel (3): RCS

*Status (3): Draft

Sender ID properties

*Sender ID (4): HoHo

*Display name (5): Hornes and Hooves

Description (6): Best goods for your cattle

Images and color

Logo: Add logo

Background image (wallpaper):

Configuration

Contact information (7)

Phone number: 1234567

Name: Maria Horse

Website: www.hoho.com

E-mail: info@hoho.com

Legal information

Privacy policy URL: Enter value

ToC URL: Enter value

Buttons: Cancel, Save

Add Sender (RCS, Sender ID properties 1)

1. *Company*: select the company with which the Sender ID will be associated.
2. *Agreement*: select the relevant agreement.
3. *Status*: select the Sender ID status in accordance with the provider data (consult the provider console for information). Possible values are:
 - a. *Active*: the Sender ID is fully operative.
 - b. *Blocked*: the Sender ID is blocked.
 - c. *Testing*: the Sender ID is in the testing mode.
 - d. *Draft*: the Sender ID application is being processed by the provider.
4. *Sender ID*: enter the numeric or alphanumeric code given by the provider.
5. *Display name*: the Sender ID name displayed in messages.
6. *Description*: a description.
7. *Phone number, Name*: supply the contact details. Click *Add extra phone* to add another phone number.

Account management

8. *Website*: enter the website URL. In the field next to it enter the button text. Click *Add extra website* to add another URL.
9. *Email*: add an email address. In the field next to it enter the button text. Click *Add extra email* to add another email.

Add Sender

*CompanyHornes and Hooves▼

*Agreement1029, EUR▼

*ChannelRCS

*StatusDraft▼

Sender ID properties

Configuration

Logo



Formats available: jpg, png. Size: 224x224, max weight: 50 KB

Background image (wallpaper)


+ Add background

Formats available: jpg, png. Size: 1440x448, max weight: 200 KB

*Color#000000

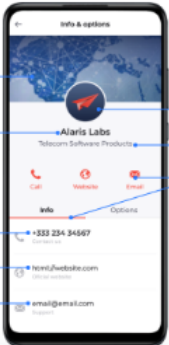
+ Add extra e-mail

Legal information

Privacy policy URL

ToC URL

Example



- Background image
- Bot Name
- Phone number
- Website
- Email
- Logo
- Description
- Colors

Cancel

Save

Add Sender (RCS, Sender ID properties 2)

1. Click to add a profile picture or logo (the allowed formats are: jpg, png, and size 224x224, max weight is 50 Kb). Click  to replace the image,  to save the image to your computer, and  to remove the image.
2. Click to add a background image (the allowed formats are: jpg, png, and size 1440x448, max weight is 200 Kb).

NOTE: The profile and background pictures are not adjusted automatically, they must be exactly the size as specified.

3. Select the profile color (if not selected, the black color will be used by default). It is the color of icons and other interface elements (see *Colors* in item (5) in the figure above).
4. Specify the link to the company's privacy policy and terms of service.
5. View how the parameters filled in this form are displayed on a recipient device.

Account management

Switch to the *Configuration* tab and proceed as follows.

Add Sender

×

*Company

Hornes and Hooves Resell ▼

*Agreement

4321, EUR ▼

*Channel

RCS RCS

*Status

Draft ▼

Sender ID properties

Configuration

*Webhook GUID

Enter value

+

*Vendor type

RCS for Business ▼

*API access key (JSON file)

No file JSON

*Agent ID

1234

*Connection

VA_em_rcs_rbm (enabled) ▼

☒ Notification settings

*Minimal message count for starting detecting ⓘ

Enter value

*Window size ⓘ

Enter value

*Trigger percent

Enter value

Webhook GUID

Webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages via webhook calls. You may use an auto-generated GUID or specify it yourself.

RCS for Business configuration

1. Create a new agent in RCS for Business Console,
2. There, copy the Agent ID (Overview — Agent information > Agent ID) and use it as Sender ID here (previous tab); you may use any value for Sender ID, but we believe using Agent ID is preferable,
3. There, go to Service account menu and press the Create key button - a JSON file will be downloaded to your computer,
4. Upload that JSON file as the API access key here,
5. There, go to Integration menu, then Cloud Pub/Sub > View subscription — Edit subscription, set Delivery type to Push and press Edit,
6. Copy the Webhook URL using the button below,
7. There, paste copied URL to Webhook endpoint URL field and press Verify.
8. If verified successfully, press Save.

Copy Webhook URL

Cancel

Save

Add Sender (RCS, Configuration, Vendor type: RCS for Business)

For RCS for Business:

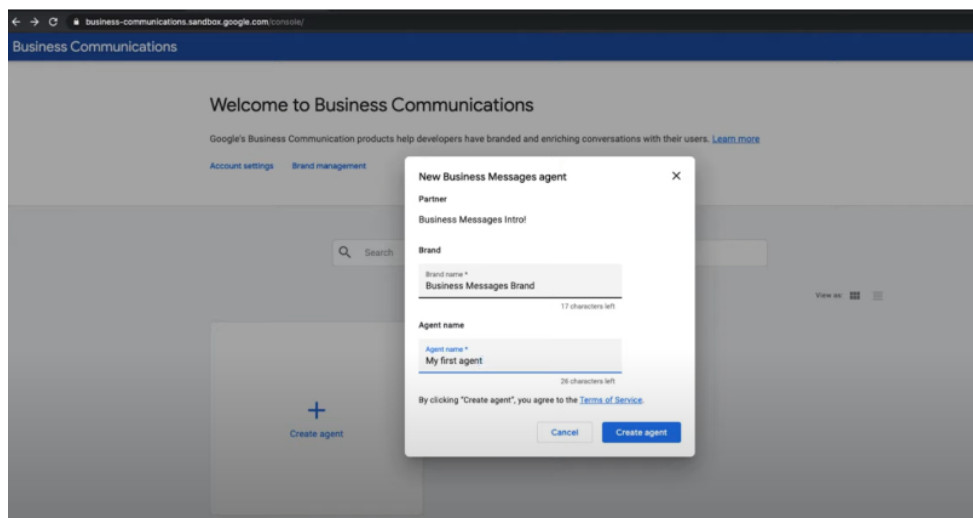
1. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
2. *Vendor type*: *RCS for Business*.
3. Configure the fields for the selected vendor type as explained in the instructions.
4. *API access Key (JSON file)*: key for access to RCS for Business API. Click on the field and upload a configuration file in JSON format provided by RCS for Business. To generate the JSON file navigate to *Service Accounts* for your GCP project and click *Create key*.
5. *Agent ID*: the Agent ID created in RCS for Business Console.
6. *Connection*: select a connection created in [Settings\HTTP connections](#) .

Account management

7. *Notification settings*: checkbox for traffic monitoring notifications.
8. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
9. *Window size*: the size of the time window (minutes) to consider for the statistics count.
10. *Trigger percent*: threshold error rate that triggers notifications.
11. Click *Save* to save the changes or *Cancel* to discard the settings.

Create an Agent in your Google Service Account as detailed below.

1. For message sending it is necessary to create a New Business Messages Agent with RCS for Business which will be the representation of the Brand or Service using the Sender ID.



Creating New Business Messages agent

NOTE: Each Agent should match a unique Sender ID created in the System.

2. In the Agent tab you will be able to set a unique Webhook URL for each sender. Details on the webhook URL can be found in Sender ID configuration tab as shown above.
3. Webhook URL also can be set in the Integrations tab as indicated below.

Account management

The screenshot displays the 'Business Communications' console for an agent named 'Bottle'. The left sidebar contains navigation links for Overview, Setup (Agent information, Service account, Integrations), Test (Devices), Deploy (Launch), Measure (Analytics), and Documentation (Guides, Samples, Reference, Support, Terms of service). The 'Integrations' link is highlighted with a red box. The main 'Overview' section shows agent details: Agent name 'Bottle', Agent ID 'bottle@rbm.goog', Project number '710621240752', and Region 'Europe'. It also displays the Service account key and Integrations details. A central image shows a mobile app interface for 'Bottle'. On the right, the 'Launch status' section indicates that the agent's information needs to be filled out before launching. The 'Test devices' section shows a table of 9 registered test devices, with the first three listed.

Phone number	Submitted	Status
+31627515845	Jun 18, 2021	Pending
+31638049972	Jun 17, 2021	Ready (Send test message)
+34651881899	Aug 25, 2020	Ready (Send test message)

6 additional test devices not shown.

[Add and verify test devices](#)

RCS for Business Overview

- Once all steps are finished the RCS Sender is ready for sending messages.

Account management

Add Sender

*Company

Hornes and Hooves Resell

*Agreement

4321, EUR

*Channel

RCS

*Status

Draft

Sender ID properties

Configuration

*Webhook GUID

Enter value

*Vendor type

GSMA Transit

*Login

HoHoHo

*Password

12345

*Token duration

360

*Connection

Default GSMA Transit (enabled)

☒ Notification settings

*Minimal message count for starting detecting

Enter value

*Window size

Enter value

*Trigger percent

Enter value

Webhook GUID

Webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages via webhook calls. You may use an auto-generated GUID or specify it yourself.

Alaris GSMA configuration

1. Create a new RCS bot on Alaris platform and open its properties (Start — RCS — Bots),
2. There, copy the Bot GUID value and use it as Sender ID here (previous tab) - Sender ID must be exactly the same as Bot GUID value on Alaris platform,
3. There, copy Client ID and Client secret values and paste them as Login and Password here, respectively,
4. Leave Token duration value at its default of 3600 seconds, unless you're explicitly instructed to set another value,
5. Copy the Webhook URL using the button below and set it as Webhook URL for the bot on Alaris side.

Copy Webhook URL

Cancel

Save

Vendor type: GSMA TRANSIT

For GSMA Transit:

- Webhook GUID:** a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
- Vendor type:** GSMA Transit.
- Login:** the *Client ID* field for the RCS bot created at the partner transit platform.
- Password:** the *Client secret* field for the RCS bot created at the partner transit platform.
- Token duration:** the token TTL (the recommended value is 3600 seconds).
- Connection:** select a connection created in [Settings\HTTP connections](#) ¹⁸³.
- Notification settings:** checkbox for traffic monitoring notifications.

Account management

8. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
9. *Window size*: the size of the time window (minutes) to consider for the statistics count.
10. *Trigger percent*: threshold error rate that triggers notifications.
11. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.3 Viber Sender IDs

To create a Viber Sender ID, select *Viber* in the *New sender* form and proceed as follows.

Add Sender

Sender ID
1

Name
2

Company
3

Agreement
4

Status
5

Webhook GUID
6

Vendor type
7

☒ Session mode
8

☒ Notification settings
10

Connection
9

Minimal message count for starting detecting
11

Trigger percent
12

Window size
13

Add Sender (Vendor type: Viber)

For *Viber*:

1. *Sender ID*: matches Service ID value created in [Settings\HTTP connections](#)¹⁸³, required.
2. *Name*: Sender name that will be displayed in the recipients' Viber app, required
3. *Company*: select the company for which the Sender ID will be used, required.
4. *Agreement*: select the agreement for which the Sender ID will be used, required.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*. Required.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *Vendor type*: *Viber*.

Account management

8. *Sessions mode*: select to enable Viber Sessions mode, a two-way interaction with a customer within a 24-hour time frame that allows you to send and receive messages in one chat, and be billed per conversation instead of per message delivered.
9. *Connection*: select a connection created in [Settings\HTTP connections](#)¹⁸³.
10. *Notification settings*: checkbox for traffic monitoring notifications.
11. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
12. *Trigger percent*: threshold error rate that triggers notifications.
13. *Window size*: the size of the time window (minutes) to consider for the statistics count.
14. Click *Save* to save the changes or *Cancel* to discard the settings.

Add Sender

*Sender ID

HoHo

1

*Name

Hornes and Hooves

2

*Company

Hornes and Hooves Reseller Company

3

*Agreement

4321, EUR

4

*Status

Active

5

Webhook GUID

Enter value

6

*Vendor type

Transit Viber

7

Session mode

8

9

*Login

Enter value

*Password

Enter value

Service type

Enter value

*Connection

Default Transit Viber (enabled)

10

Notification settings

11

*Trigger percent

Enter value

13

*Minimal message count for starting detecting ⓘ

Enter value

12

*Window size ⓘ

Enter value

14

15

Cancel

Save

Add Sender (Vendor type: Transit Viber)

For *Transit Viber*:

1. *Sender ID*: matches Service ID value created in [Settings\HTTP connections](#)¹⁸³, required.
2. *Name*: Sender name that will be displayed in the recipients' Viber app, required
3. *Company*: select the company for which the Sender ID will be used, required.

Account management

4. *Agreement*: select the agreement for which the Sender ID will be used, required.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*. Required.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *Vendor type*: *Transit Viber*.
8. *Sessions mode*: select to enable Viber Sessions mode, a two-way interaction with a customer within a 24-hour time frame that allows you to send and receive messages in one chat, and be billed per conversation instead of per message delivered.
9. *Login*, *Password* and *Service type*: values provided by the partner transit platform owner and correspond to the parameters defined in the System partner Client channel and POI.
10. *Connection*: select a connection created in [Settings\HTTP connections](#) .
11. *Notification settings*: checkbox for traffic monitoring notifications.
12. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
13. *Trigger percent*: threshold error rate that triggers notifications.
14. *Window size*: the size of the time window (minutes) to consider for the statistics count.
15. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.4 WhatsApp Sender IDs

To create a WhatsApp Sender ID, select *WhatsApp* in the *New sender* form and proceed as follows.

NOTE: Prior to creating a Sender ID, create a record in [Account management\WhatsApp Business Account](#) .

Account management

Add Sender

Sender ID

Hornes and Hooves

Name

Hornes and Hooves

Company

Hornes and Hooves Reseller Company

Agreement

4321, EUR

Status

Active

Webhook GUID

Enter value

WABA Id

Hornes and Hooves

Is Sync

☒

Vendor type

Dialog360

Connection

Default Dialog360 (enabled)

API key

Enter value

Media URL

https://waba.360dialog.io/v1/media

Notification settings

☒

Trigger percent

Enter value

Minimal message count for starting detecting

Enter value

Window size

Enter value

Cancel

Save

Add Sender (WhatsApp)

1. *Sender ID*: enter the numeric or alphanumeric code given by the WhatsApp service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.

NOTE: For each new sender you have to add a new Webhook link using the appropriate API key received for that sender. Do not forget to generate a "Webhook GUID" and add it to the bot_id field in the Webhook link.

7. *WABA Id*: select the ID created in [Account management\WhatsApp Business Account](#) ⁸³.

NOTE: Each Sender ID belongs to its own WABA.

8. *Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
9. *Vendor type*: select the service provider. Possible options are:
 - a. *Dialog360*;
 - b. *Nexmo*;

Account management

- c. *Meta (MasOrange/Telin)*;
 - d. *Telin NeuAPIX*;
 - e. *Gupshup*;
 - f. *Dialog360 Cloud*.
10. *Connection*: select a connection created in [Settings\HTTP connections](#)¹⁸³.
 11. Configure the fields based on the selected Vendor type.
 12. *Notification settings*: checkbox for traffic monitoring notifications.
 13. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
 14. *Trigger percent*: threshold error rate that triggers notifications.
 15. *Window size*: the size of the time window (minutes) to consider for the statistics count.
 16. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.4.1 Dialog360

Dialog360 is a provider for interaction with WhatsApp. The provider can easily be integrated into the System.

To set up Dialog360 follow the procedure as detailed below.

On 360dialog side:

1. Create a WABA account on the official Dialog360 site. The [360dialog Client Hub](#) is a web application that can be used to manage WhatsApp Business Accounts and phone numbers.
2. Follow the [steps](#) to create a new WABA.

On the platform side:

1. Register your WABA in the System as described in [Account management\WhatsApp Business Account](#)⁸³.
2. On the stage of creating a Sender ID ([Account management\Sender IDs](#)⁴⁴) in the *Vendor Type* field choose *Dialog360*. After that several additional fields will become available:

Account management

Add Sender
×

*Sender ID a HoHo	*Name b Hornes and Hooves
*Company c AB For reselling	*Agreement d ab for reselling , EUR
*Status e Active	Webhook GUID f Enter value
*WABA Id g Select...	☒ Is Sync h
*Vendor type i Dialog360	*Connection j Default Dialog360 (enabled)
*API key k Enter value	*Media URL l https://waba.360dialog.io/v1/media
☒ Marketing Messages Lite API m	
☒ Notification settings n	
*Minimal message count for starting detecting o Enter value	*Trigger percent p Enter value
*Window size q Enter value	

Cancel
Save r

Add Sender: Dialog360

- Sender ID*: enter the numeric or alphanumeric code given by the service provider.
- Name*: type the Sender ID name that will be displayed in messages.
- Company*: select an appropriate Company.
- Agreement*: select an appropriate Agreement.
- Status*: select the Sender ID status. Possible values include: Active, Blocked, Draft.
- Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from Nexmo.
- WABA Id*: enter the WABA ID.
- Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
- Vendor type*: *Dialog360*.
- Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁸³.
- API key*: copy the API key from your account at the WhatsApp service provider.
- Media URL*: copy the URL from your account at the WhatsApp service provider.

Account management

- m. *Marketing Messages Lite API*: select to enable the MM Lite API that allows for more dynamic messaging limits, so marketing messages with high engagement can reach more customers.
- n. *Notification settings*: checkbox for traffic monitoring notifications.
- o. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
- p. *Trigger percent*: threshold error rate that triggers notifications.
- q. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- r. Click *Save* to save the record or *Cancel* to discard the settings.

6.5.4.2 Nexmo

Nexmo offers a free tier with a limited number of SMS messages included per month. Additional messages can be purchased through their pay-as-you-go pricing model.

To create a WhatsApp Sender ID with the *Nexmo* Vendor type, select *WhatsApp* in the *New sender* form and proceed as follows.

NOTE: Prior to creating a Sender ID, create a record in [Account management\WhatsApp Business Account](#) .

Account management

Add Sender

Sender ID
1

Hornes_Hooves

Company
3

Hornes and Hooves Reseller Company

Status
5

Active

WABA Id
7

Hornes and Hooves

Vendor type
9

Nexmo

API key
11

Enter value

API Secret
12

Enter value

Notification settings
13

☒ Notification settings

Minimal message count for starting detecting ⓘ
14

Enter value

Name
2

Hornes and Hooves

Agreement
4

0987, EUR

Webhook GUID
6

Enter value

Is Sync
8

☒ Is Sync

Connection
10

Enter value

Trigger percent
15

Enter value

Window size ⓘ
16

Enter value

Cancel
Save

Add Sender: Nexmo

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select an appropriate Company.
4. *Agreement*: select an appropriate Agreement.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from Nexmo.
7. *WABA Id*: enter the WABA ID.
8. *Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
9. *Vendor type*: *Nexmo*.
10. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁸³.
11. *API key*: copy the API key from your account at the WhatsApp service provider.

Account management

12. *API Secret*: copy the API password from your account at the WhatsApp service provider.
13. *Notification settings*: checkbox for traffic monitoring notifications.
14. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
15. *Trigger percent*: threshold error rate that triggers notifications.
16. *Window size*: the size of the time window (minutes) to consider for the statistics count.
17. Click *Save* to save the record or *Cancel* to discard the settings.

6.5.4.3 Meta (MasOrange/Telin)

MasOrange and Telin are service providers for interaction with WhatsApp via messaging API. The integration to the System will be easily done if you follow the below steps:

1. Register a WABA (WhatsApp Business Account) on MasOrange/Telin side first to get the credentials in order to proceed with configuration on the platform side further.
2. Create WABA in the BackOffice interface ([Account Management/WhatsApp Business Account](#)⁸³).

Add WABA

×

*Name

a

*Company

b

AB For reselling

*WABA Id

c

*Timezone

d

Europe/Brussels

*Namespace

e

Cancel

Save

f

Add WABA

- a. *Name*: type the WABA name.
- b. *Company*: select the company for which the MasOrange/Telin WABA will be used.
- c. *WABA Id*: enter the WABA ID from your MasOrange/Telin WABA account.
- d. *Timezone*: select the timezone for the WABA.
- e. *Namespace*: copy the namespace code from your WABA account. Note that MasOrange/Telin may not provide you with the Namespace. In this case, any value can be used.

Account management

- f. Click *Save* to save the record or *Cancel* to discard the settings.
3. Create an HTTP connection as detailed in the [Settings\HTTP connections\Meta\(MasOrange/Telin\)](#).
4. Create a WA Sender ID ([Account Management /Sender IDs](#)): set Vendor Type as Meta (MasOrange/Telin) and choose the WABA. Note that each Sender ID belongs to its own WABA. Fill up the rest of the parameters according to your registered MasOrange/Telin account. Phone number ID is a parameter, which is specific for MasOrange/Telin, it's sent instead of *Sender_id* in such request as SMS sending and templates.

Add Sender

×

*Sender ID a HoHo	*Name b Hornes and Hooves
*Company c AB For reselling	*Agreement d ab for reselling , EUR
*Status e Active	Webhook GUID f Enter value
*WABA Id g Select...	h ☒ Is Sync
*Vendor type i Meta(MasOrange/Telin)	*Connection j Orange (enabled)
*App ID k Enter value	*Phone number ID Enter value
l ☒ Marketing Messages Lite API	
m ☒ Notification settings	
*Minimal message count for starting detecting n Enter value	*Access token Enter value
	*Trigger percent o Enter value
	*Window size p Enter value

q

Cancel

Save

Add Sender: Meta (MasOrange/Telin)

- a. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
- b. *Name*: type the Sender ID name that will be displayed in messages.
- c. *Company*: select an appropriate Company.
- d. *Agreement*: select an appropriate Agreement.
- e. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.

Account management

- f. *Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from Nexmo.
- g. *WABA Id*: enter the WABA ID.
- h. *Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
- i. *Vendor type*: *Meta (MasOrange/Telin)*.
- j. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁸³.
- k. *App ID, Phone Number ID, Access token*: parameters are filled in accordance with your registered MasOrange/Telin account.
- l. *Marketing Messages Lite API*: select to enable the MM Lite API that allows for more dynamic messaging limits, so marketing messages with high engagement can reach more customers.
- m. *Notification settings*: checkbox for traffic monitoring notifications.
- n. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
- o. *Trigger percent*: threshold error rate that triggers notifications.
- p. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- q. Click *Save* to save the changes or *Cancel* to discard the settings.

NOTE: *Telin NeuAPIX* is also available.

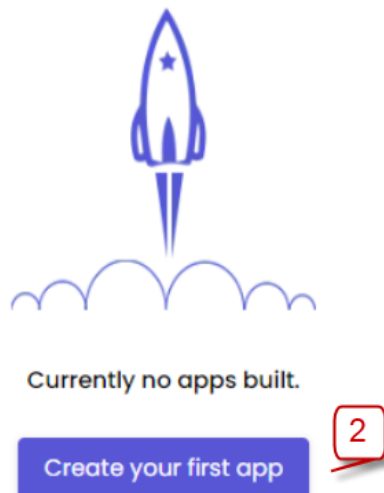
6.5.4.4 Gupshup

The platform provides an opportunity to integrate with Gupshup Integrations Platform. It is a convenient platform used to build automated workflows and manage conversations. To complete the integration, perform the steps described below:

1. Create an account with Gupshup.

NOTE: Gupshup provides 3 types of accounts (*self-serve, console self-serve, enterprise*), all of them are supported by the System.

2. Log in to your account and create an access API app:



Account management

NOTE: Once created the App will appear in the Dashboard.

- To set the connection live, click on *Go live* button and proceed with registration.



- Get App Name, App ID and API key in the Settings tab.
- If you have a self-serve or an enterprise account, in order to setup the callback URL it is necessary to contact the Gupshup's dev support team.
- To complete the connection with Gupshup vendor from the System side, create a new HTTP connection with the System as detailed in [Settings\HTTP connections\Gupshup](#)¹⁸⁸.
- Create a corresponding Sender ID in [Account management\Sender IDs](#).⁴⁴
- Choose WhatsApp Sender ID type for the new sender:

New sender ×

☐ SMS

☐ RCS

☐ Viber

☒ WhatsApp ⁸

☐ WeChat

☐ Email

☐ Telegram Gateway

☐ Push

☐ TTS

☐ Voice

☐ Mobile Push

☐ FlashCall

Apply

New sender: WhatsApp

- Fill in the empty fields in the form with the following values:

Account management

The screenshot shows the 'Add Sender' form with the following fields and controls labeled with red callout boxes:

- a**: Sender ID input field (value: Hornes_Hooves)
- b**: Name input field (value: Hornes and Hooves)
- c**: Company dropdown menu (value: Hornes and Hooves Reseller Company)
- d**: Agreement dropdown menu (value: 0987, EUR)
- e**: Status dropdown menu (value: Active)
- f**: Webhook GUID input field with a generate icon
- g**: WABA Id dropdown menu (value: Hornes and Hooves)
- h**: Is Sync checkbox (checked)
- i**: Vendor type dropdown menu (value: Gupshup)
- j**: Connection dropdown menu (value: Enter value)
- k**: App ID input field (value: Enter value)
- l**: API key input field (value: Enter value)
- m**: Access media token input field (value: Enter value)
- n**: Notification settings checkbox (checked)
- o**: Minimal message count for starting detecting input field (value: Enter value)
- p**: Trigger percent input field (value: Enter value)
- q**: Window size input field (value: Enter value)
- r**: Cancel and Save buttons

Add Sender: Gupshup

- Sender ID**: enter the numeric or alphanumeric code given by the service provider.
- Name**: type the Sender ID name that will be displayed in messages.
- Company**: select an appropriate Company.
- Agreement**: select an appropriate Agreement.
- Status**: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
- Webhook GUID**: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from Gupshup.
- WABA Id**: enter the WABA ID from your Gupshup WABA account.
- Is Sync**: when enabled, the API key value is synchronized with the WhatsApp service provider.
- Vendor type**: *Gupshup*.
- Connection**: select the HTTP connection created for Gupshup Integrations Platform.
- App ID**: App ID from the Settings tab of your Gupshup account.
- API key**: API key from the Settings tab of your Gupshup account.
- Access media token**: use the token as detailed in [Appendix 4. Getting the access token for your Gupshup App](#) ²⁶⁴.
- Notification settings**: checkbox for traffic monitoring notifications.

Account management

- o. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
- p. *Trigger percent*: threshold error rate that triggers notifications.
- q. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- r. Click *Save* to save the record or *Cancel* to discard the settings.

NOTE: *Gupshup v3* is also available.

NOTE: To get App's templates, submit templates, send messages etc. use the token as detailed in [Appendix 4. Getting the access token for your Gupshup App.](#) 

6.5.4.5 Dialog360 Cloud

Dialog360 Cloud can easily be integrated into the System.

To create a Dialog360 Cloud Sender ID follow the procedure detailed below:

On 360dialog side:

1. Create a WABA account on the official Dialog360 site. The [360dialog Client Hub](#) is a web application that can be used to manage WhatsApp Business Accounts and phone numbers.
2. Follow the [steps](#) to create a new WABA.

On the platform side:

1. Create a new HTTP connection as detailed in [Settings\HTTP connections](#) .
2. On the stage of creating a Sender ID ([Account management\Sender IDs](#) ) in the *Vendor Type* field choose *Dialog360 Cloud*. After that several additional fields will become available:

Account management

Add Sender

✕

***Sender ID** 1

***Name** 2

***Company** 3

***Agreement** 4

***Status** 5

Webhook GUID 6

***WABA Id** 7

Is Sync 8

☒

***Vendor type** 9

***Connection** 10

***API key** 11

Marketing Messages Lite API 12

☒

Notification settings 13

☒

***Trigger percent** 15

***Minimal message count for starting detecting** 14

***Window size** 16

Cancel
Save 17

Add Sender: Dialog360 Cloud

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select an appropriate Company.
4. *Agreement*: select an appropriate Agreement.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from *Dialog360 Cloud*.
7. *WABA Id*: enter the WABA ID.
8. *Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
9. *Vendor type*: *Dialog360 Cloud*.
10. *Connection*: select a connection configured for the vendor type in [Settings\HTTP connections](#) ¹⁸³.
11. *API key*: copy the API key from your account at the WhatsApp service provider.

Account management

12. *Marketing Messages Lite API*: select to enable the MM Lite API that allows for more dynamic messaging limits, so marketing messages with high engagement can reach more customers.
13. *Notification settings*: checkbox for traffic monitoring notifications.
14. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
15. *Trigger percent*: threshold error rate that triggers notifications.
16. *Window size*: the size of the time window (minutes) to consider for the statistics count.
17. Click *Save* to save the record or *Cancel* to discard the settings.

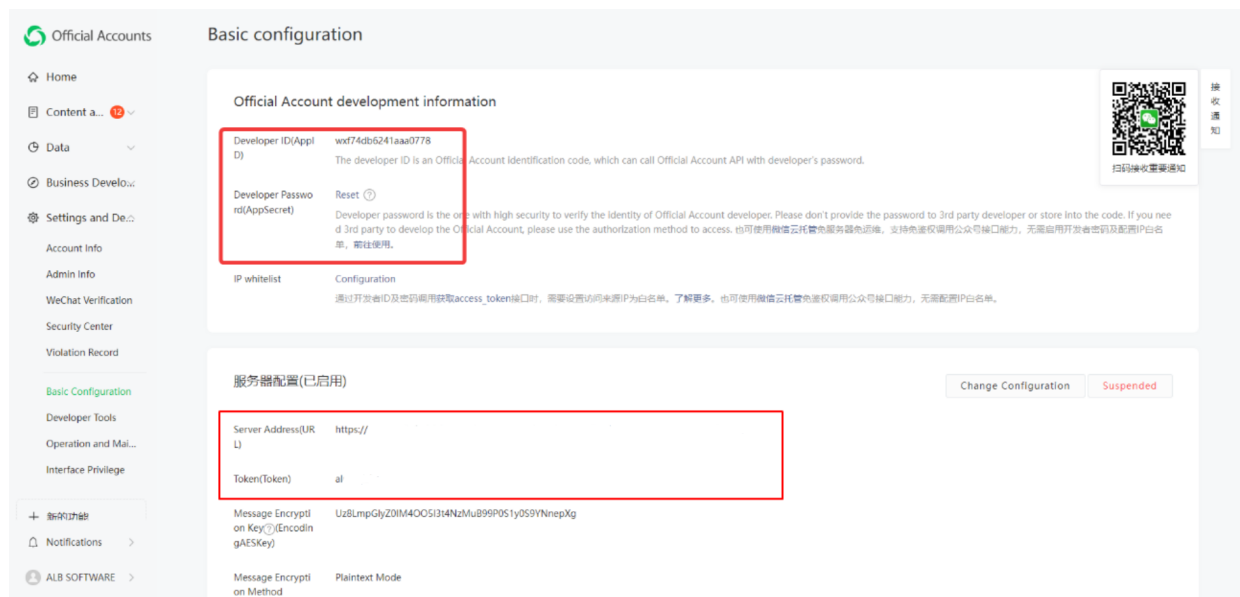
6.5.5 WeChat Sender IDs

WeChat is a multifunctional app supported for integration with the System.

In the System, it is possible to send text MTs, MOs, send pictures and launch chatbots. Note, that now it is impossible to use Broadcasts for WeChat.

To configure the WeChat channel:

1. Create a WeChat Official Account.



WeChat account

2. Create a corresponding Sender ID in [Account management\Sender IDs](#).
3. Choose WeChat Sender ID type for the new sender:

Account management

New sender ×

- ☐ SMS
- ☐ RCS
- ☐ Viber
- ☐ WhatsApp
- ☐ VK/OK
- ☒ WeChat
- ☐ Email
- ☐ Telegram Gateway
- ☐ Push
- ☐ TTS
- ☐ Voice
- ☐ Mobile Push
- ☐ FlashCall

3

Apply

New sender: WeChat

4. Fill in the empty fields in the form with the following values:

Account management

Add Sender

Sender ID
HoHo

Company
Hornes and Hooves Reseller Company

Status
Active

Vendor type
WeChat

App ID
Enter value

Notification settings
☒

Minimal message count for starting detecting
Enter value

Name
Hornes and Hooves

Agreement
0987, EUR

Webhook GUID
Enter value

Connection
Enter value

AppSecret
Enter value

Token
Enter value

Trigger percent
Enter value

Window size
Enter value

Cancel
Save

Add Sender: WeChat

- Sender ID*: enter the numeric or alphanumeric code given by the service provider.
- Name*: type the Sender ID name that will be displayed in messages.
- Company*: select an appropriate Company.
- Agreement*: select an appropriate Agreement.
- Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
- Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from WeChat.
- Vendor type*: *WeChat*.
- Connection*: select the HTTP connection created for WeChat.
- App ID*, *AppSecret* and *Token*: these credentials are provided by WeChat.
- Notification settings*: checkbox for traffic monitoring notifications.

Account management

- k. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
- l. *Trigger percent*: threshold error rate that triggers notifications.
- m. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- n. Click *Save* to save the record or *Cancel* to discard the settings.

The system currently supports sending and receiving messages of the Customer Messages type.

WeChat documentation is available [here](#).

6.5.6 Email Sender IDs

To create a Sender ID for email communications, select *Email* in the *New sender* form and proceed as follows.

The screenshot shows the 'Add Sender' form with the following fields and callouts:

- 1: *Sender ID (text input: HoHo)
- 2: *Name (text input: Hornes and Hooves)
- 3: *Company (dropdown: Hornes and Hooves Reseller Company)
- 4: *Agreement (dropdown: 0987, EUR)
- 5: *Status (dropdown: Active)
- 6: Webhook GUID (text input: Enter value)
- 7: *Vendor type (dropdown: Elasticemail)
- 8: *Connection (dropdown: Enter value)
- 9: *API key (text input: Enter value)
- 10: *Sender Email (text input: Enter sender email)
- 11: Notification settings (checkbox: checked)
- 12: *Minimal message count for starting detecting (text input: Enter value)
- 13: *Trigger percent (text input: Enter value)
- 14: *Window size (text input: Enter value)
- 15: Cancel and Save buttons at the bottom right.

Add Sender (Email)

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.

Account management

5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.

NOTE: The webhook URL which is set on Elasticemail side should be the following:

https://domainname/webhook/elasticemail?bot_id=<bot_id> where *bot_id* is the Webhook GUID set for the Sender.

7. *Vendor type*: select the service provider. Currently the available option is *Elasticemail*.
8. *Connection*: select a connection for Elasticemail service created in [Settings\HTTP connections](#) .
9. *API key*: your personal key provided by the vendor.
10. *Sender Email*: email from which broadcasts will be sent.
11. *Notification settings*: checkbox for traffic monitoring notifications.
12. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
13. *Trigger percent*: threshold error rate that triggers notifications.
14. *Window size*: the size of the time window (minutes) to consider for the statistics count.
15. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.7 Telegram Gateway Sender IDs

To create a Sender ID for Telegram Gateway communications, select *Telegram Gateway* in the *New sender* form and proceed as follows.

Account management

Add Sender (Telegram Gateway)

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *Vendor type*: *Telegram Gateway*.
8. *Connection*: select a connection configured for the vendor type in [Settings\HTTP connection](#) ¹⁹⁵.
9. *API key*: your personal key provided by the vendor.
10. *Is verified*: select the checkbox if the sender is verified on Telegram.
11. *Notification settings*: checkbox for traffic monitoring notifications.

Account management

12. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
13. *Trigger percent*: threshold error rate that triggers notifications.
14. *Window size*: the size of the time window (minutes) to consider for the statistics count.
15. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.8 Telegram Sender IDs

To create a Sender ID for Telegram communications:

1. Launch the @botFather bot in the Telegram interface.
2. Click Create a New Bot.
3. Provide Bot name and User name.
4. Click the Create Bot button.
5. Copy the bot token. It looks like 1234XXX:gfgwfwfwefh...
6. Provide this token in the *API key* field of the *Add Sender* form.
7. Generate Webhook GUID.
8. To connect the Telegram bot, you need to register a webhook in the Telegram API by sending a POST request `https://api.telegram.org/bot{{bot-token}}/setwebhook?url={{webhook-platform}}`.
9. Select *Telegram* in the *New sender* form and proceed as follows.

Account management

Add Sender

Sender ID

HoHo

Company

System owner

Status

Active

Vendor type

Telegram

API key

Enter value

☒ Notification settings

Minimal message count for starting detecting

100

Name

Hornes and Hooves

Agreement

INT-1, USD

Webhook GUID

Enter value

Connection

Enter value

Trigger percent

10

Window size

10

Cancel

Save

Add Sender (Telegram)

- Sender ID:** enter the numeric or alphanumeric code from the User name field on the @botFather side (as detailed above).
- Name:** type the Sender ID name that will be displayed in messages.
- Company:** select the company for which the Sender ID will be used.
- Agreement:** select the agreement for which the Sender ID will be used.
- Status:** select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
- Webhook GUID:** a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
- Vendor type:** *Telegram*.
- Connection:** select a connection configured for the vendor type in [Settings\HTTP connection](#).
- API key:** your personal key provided by the vendor.
- Notification settings:** checkbox for traffic monitoring notifications.
- Trigger percent:** threshold error rate that triggers notifications.
- Minimal message count for starting detecting:** minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.

Account management

- m. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- n. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.9 Push Sender IDs

The *Push* channel serves to send standard push notifications to the contacts's device. Push notifications are pop-up notifications on the phone informing contacts about services, promotions, news and updates.

To create a Sender ID for Push communications, select *Push* in the *New sender* form and proceed as follows.

The screenshot shows the 'Add Sender' form with the following fields and callouts:

- 1. Sender ID (text input: HoHo)
- 2. Name (text input: Hornes and Hooves)
- 3. Company (dropdown: Hornes and Hooves Reseller Company)
- 4. Agreement (dropdown: 0987, EUR)
- 5. Status (dropdown: Active)
- 6. Webhook GUID (text input: Enter value, with a generate icon)
- 7. Vendor type (dropdown: Firebase)
- 8. API key (text input: No file JSON)
- 9. Notification settings (checkbox: checked)
- 10. Minimal message count for starting detecting (text input: Enter value)
- 11. Trigger percent (text input: Enter value)
- 12. Window size (text input: Enter value)
- 13. Cancel/Save buttons at the bottom right.

Add Sender (Push)

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.

Account management

7. *Vendor type: Firebase.*
8. *API key:* your personal key provided by the vendor. Click to upload a JSON file.
9. *Notification settings:* checkbox for traffic monitoring notifications.
10. *Minimal message count for starting detecting:* minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
11. *Trigger percent:* threshold error rate that triggers notifications.
12. *Window size:* the size of the time window (minutes) to consider for the statistics count.
13. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.10 TTS Sender IDs

The *TTS* (Text-To-Speech) channel serves to convert message text, including OTP (One-Time Password) codes, into a call.

To create a Sender ID for TTS communications, select *TTS* in the *New sender* form and proceed as follows.

The screenshot shows the 'Add Sender' form with the following fields and callouts:

- 1. Sender ID (text input: HoHo)
- 2. Name (text input: Hornes and Hooves)
- 3. Company (dropdown: Hornes and Hooves Reseller Company)
- 4. Agreement (dropdown: 0987, EUR)
- 5. Status (dropdown: Active)
- 6. Webhook GUID (text input: Enter value)
- 7. Vendor type (dropdown: Default softswitch)
- 8. Webhook URL (text input: Enter value)
- 9. Notification settings (checkbox: checked)
- 10. Minimal message count for starting detecting (text input: Enter value)
- 11. Trigger percent (text input: Enter value)
- 12. Window size (text input: Enter value)
- 13. Cancel and Save buttons at the bottom right.

Add Sender (TTS)

1. *Sender ID:* enter the numeric or alphanumeric code given by the service provider.
2. *Name:* type the Sender ID name that will be displayed in messages.

Account management

3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *Vendor type*: *Default softswitch*.
8. *Webhook URL*: the URL that you can send an API request to in order to notify the user that a certain event has occurred. It is supplied by your service provider.
9. *Notification settings*: checkbox for traffic monitoring notifications.
10. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
11. *Trigger percent*: threshold error rate that triggers notifications.
12. *Window size*: the size of the time window (minutes) to consider for the statistics count.
13. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.11 Voice Sender IDs

The *Voice* channel serves to establish voice communication with the contact from the Client portal *Conversations* interface.

To create a Sender ID for *Voice* communications, select *Voice* in the *New sender* form and proceed as follows.

Add Sender
✕

*Sender ID 1

*Name 2

*Company 3

*Agreement 4

*Status 5

*Vendor type 6

7

Add Sender (Voice)

1. *Sender ID*: the caller phone number (A-number).
2. *Name*: type the name of the A-number, it may be the name of the contact/organization.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.

Account management

5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Vendor type*: *Default softswitch*.
7. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.12 Mobile Push Sender IDs

The *Mobile Push* channel serves to send messages to a third-party mobile app and get the delivery status of the sent message.

To create a Sender ID for the *Mobile Push* channel, select *Mobile Push* in the *New sender* form and proceed as follows.

Add Sender
×

*Sender ID 1 HoHo *Company 3 Hornes and Hooves Reseller Company *Status 5 Active *Vendor type 7 Mobile Push *Login 8 Hohoho *Minimal message count for starting detecting ⓘ 12 Enter value	*Name 2 Hornes and Hooves *Agreement 4 4321, EUR Webhook GUID 6 Enter value *Password 9 1234567 *Connection 10 mobile_push (enabled) *Trigger percent 13 Enter value *Window size ⓘ 14 Enter value
--	--

☒

Notification settings

15

Cancel

Save

Add Sender (Mobile Push)

1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.

Account management

7. *Vendor type: Mobile Push.*
8. *Login:* the credentials supplied by your service provider.
9. *Password:* the credentials supplied by your service provider.
10. *Connection:* select a connection created in [Settings\HTTP connections](#) ¹⁸³.
11. *Notification settings:* checkbox for traffic monitoring notifications.
12. *Minimal message count for starting detecting:* minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
13. *Trigger percent:* threshold error rate that triggers notifications.
14. *Window size:* the size of the time window (minutes) to consider for the statistics count.
15. Click *Save* to save the changes or *Cancel* to discard the settings.

6.5.13 FlashCall Sender IDs

2.0.0 A flash call is a security authentication method where an app makes a very short, automatic call to a user, immediately hanging up to leave a missed call. The phone number or specific digits of the caller ID act as a one-time password (OTP), allowing seamless verification without manual user input.

To create a Sender ID for FlashCall communications, select FlashCall in the *New sender* form and proceed as follows.

Add Sender

×

*Sender ID 1 123456789 *Company 3 Hornes and Hooves Reseller Company *Status 5 Active *Vendor type 7 Default softswitch Notification settings 9 ☒ *Minimal message count for starting detecting 10 Enter value	*Name 2 Hornes and Hooves *Agreement 4 0987, EUR Webhook GUID 6 Enter value *Recipients pool 8 Enter a range or multiple ranges of recipients' numbers *Trigger percent 11 Enter value *Window size 12 Enter value 13 Cancel Save
---	--

Add Sender (FlashCall)

1. *Sender ID:* enter the numeric or alphanumeric code given by the service provider.
2. *Name:* type the Sender ID name that will be displayed in messages.

Account management

3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.
5. *Status*: select the Sender ID status. Possible values include: *Active*, *Blocked*, *Draft*.
6. *Webhook GUID*: a webhook GUID uniquely identifies the Sender ID when receiving message status updates and incoming messages through webhook calls. Click  to generate or specify it manually.
7. *Vendor type*: *Default softswitch*.
8. *Recipients pool*: pool of numbers from which flash calls (with OTP codes) will be delivered. Multiple ranges are acceptable.

NOTE: In the Sender ID field specify any number from the pool.

9. *Notification settings*: checkbox for traffic monitoring notifications.
10. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
11. *Trigger percent*: threshold error rate that triggers notifications.
12. *Window size*: the size of the time window (minutes) to consider for the statistics count.
13. Click *Save* to save the changes or *Cancel* to discard the settings.

6.6 WhatsApp Business Account

The *Account management\WhatsApp Business Account* interface serves to register WhatsApp Business Accounts (WABA) in the System. Note that an account must be registered at your WhatsApp service provider prior to configuring it in the BackOffice interface.

WhatsApp Business Account					
					Columns
					+ Add WABA
ID	Company	Name	WABA Id	Timezone	Namespace
2	Demo AY	360Dialog	103302382679112	Europe/Istanbul	8126b92a_67bc_4f68_92e7_...
1	VA-tes073	VA	VA78	Africa/Abidjan	test

WhatsApp Business Account

To create a new record, click *Add WABA* and proceed as follows.

Account management

The screenshot shows a modal window titled "Add WABA" with a close button (X) in the top right corner. The form contains five input fields and two buttons at the bottom. Red speech bubble callouts with numbers 1 through 6 point to specific elements: 1 points to the "Name" field containing "HoHo WABA"; 2 points to the "Company" dropdown menu showing "Hornes and Hooves Reseller Company"; 3 points to the "WABA Id" field containing "102938947678901"; 4 points to the "Timezone" dropdown menu showing "Europe/Amsterdam +02:00"; 5 points to the "Namespace" field containing "b5dbc459-8fab-4adf-aed7-0fdea77415b4"; and 6 points to the "Save" button. The "Cancel" button is also visible.

Add WABA

1. *Name*: type the WABA name.
2. *Company*: select the company for which the WABA will be used.

NOTE: Companies can be created in [Account management /Companies](#).

3. *WABA Id*: enter the WABA ID from your WABA account.
4. *Timezone*: select the timezone for the WABA.
5. *Namespace*: copy the namespace code from your WABA account.
6. Click **Save** to save the record.

6.7 WhatsApp templates

The *Account management\WhatsApp templates* interface serves to view WhatsApp templates created by users in the Client portal and available in the System.

Account management

ID	Company	Registered Name	Service Category	Sender ID ↑	Status	Language	Created
154	Demo AY	ewfwef43f4gf425g4g	MARKETING	360Dialog	APPROVED		13
286	Demo AY	va_header_ut3	UTILITY	360Dialog	REJECTED		14
44	Demo AY	sample_purchase_feedback	MARKETING	360Dialog	APPROVED		13
78	Demo AY	va_test_auth2	AUTHENTICATION	360Dialog	APPROVED		13
229	Demo AY	va_06_text_ut	UTILITY	360Dialog	APPROVED		14
80	Demo AY	referferfrefqwef	MARKETING	360Dialog	APPROVED		13
265	Demo AY	va_header_ut_1	UTILITY	360Dialog	APPROVED		14
336	Demo AY	new_wa_tto_1	MARKETING	360Dialog	DRAFT		14
343	Demo AY	wa_test_auth	AUTHENTICATION	360Dialog	APPROVED		14
234	Demo AY	test_image_4	MARKETING	360Dialog	APPROVED		14
279	Demo AY	va_header_ut2	UTILITY	360Dialog	REJECTED		14
67	Demo AY	sfsdfsdf	MARKETING	360Dialog	APPROVED	English	31.07.2023
219	Demo AY	temp_image_dab	MARKETING	360Dialog	APPROVED	Afrikaans	07.05.2024
177	Demo AY	4725_11	MARKETING	360Dialog	DRAFT	English	01.03.2024
31	Demo AY	sample_flight_confirmation	UTILITY	360Dialog	APPROVED	Spanish	29.05.2023
262	Demo AY	va_header_mark_7	MARKETING	360Dialog	APPROVED	English	10.07.2024
74	Demo AY	rtergtergergre	AUTHENTICATION	360Dialog	APPROVED	English	10.10.2023
325	Demo AY	new_wa_test_coupon	MARKETING	360Dialog	APPROVED	English	02.08.2024
224	Demo AY	test_geo_footer	MARKETING	360Dialog	APPROVED	Afrikaans	17.05.2024
7	Demo AY	first_test_temp	MARKETING	360Dialog	APPROVED	English	29.05.2023
323	Demo AY	regregregwergegg	MARKETING	360Dialog	APPROVED	English	01.08.2024

WhatsApp templates

- The following details are displayed in the table:
 - Template ID;
 - Company: the company that registered the template;
 - Registered name: name that was specified for the template during its creation;
 - Service category: Marketing, Utility or Authentication;
 - Sender ID;
 - Status: template status (Approved, Draft or Rejected);

NOTE: The wait time for the successful delivery status update from Meta in case of *Non-template* type messages and *Marketing* and *Utility* message categories is set to 30 days and 30 minutes for the *Authentication* message category.

- Language: language selected for the template;
 - Created: the date when the template was created.
- Click to apply sorting (ascending or descending).
 - Click to apply filters.

To view the template click on its record in the table.

Account management

View Template

ID 10843

Created: 2024 Dec 02 22:19:32

Company

Demo Or

Copy to clipboard

Sender

360cloud_dabagyan

Category

AUTHENTICATION

Language

English (en)

Created

02.12.2024

Authentication

{VERIFICATION_CODE} is your verification code.

Security disclaimer

Expiration warning

Buttons

Button 1

Button type

Copy Code

Button text

3443543

View WhatsApp templates

1. Click to view the dates when the template was created or updated.

6.8 Sender ID applications

The *Account management\Sender ID applications* interface serves to view and manage Sender ID applications created by users in the Client portal (for the SMS and RCS channels).

Sender ID applications									
Submitted	Company	Type	Channel	Sender ID	Status	Assigned to	Reject reason	Comment	Updated
19.11.2025	Demo AY	Create Sender ID	SMS		IN PROGRESS	backoffice-manager			19.11.2025
09.01.2025	Demo AY	Create Sender ID	SMS	VasTelecom	DONE	backoffice-manager			09.01.2025
16.03.2023	Demo AY	Change Sender ID	RCS	cake&candy	CANCELED				06.06.2023
21.10.2022	Demo AY	Create Sender ID	RCS		CANCELED				30.01.2023
07.10.2022	Demo AY	Create Sender ID	RCS	cake&candy	DONE	backoffice-manager			30.01.2023
13.07.2022	Demo AY	Change Sender ID	RCS		REJECTED	backoffice-manager			10.02.2025

Sender ID applications

1. *Type*: the application type. Possible values include:
 - a. *Create Sender ID*: the Sender ID application has been created by a Client portal user.
 - b. *Change Sender ID*: the Sender ID application has been rejected by a BackOffice user and then resubmitted by a Client portal user.
2. *Status*: the Sender ID status:
 - a. *New*: the registration request has been created in the Client portal (this is the initial status that appears for all new applications submitted from the Client portal). Applications with the *New* status have the *Reject application*, *Cancel* and *Take to work* buttons. When you click the *Take to work* button, the request changes its status to *In progress* and is assigned to the user who has taken it into work.

Account management

New Sender ID Application

Assigned to
09.08.2024 07:46
Created
09.08.2024 07:46
Updated

×

NEW
Status

Channels

*Channel

SMS

Documents

Allowed format: pdf., max size 10mb, up to 10 files.

Bot information

*Sender ID name

131313

Description

0 / 100

Reject application

Cancel

Take to work

New Sender ID Application (New)

- b. *Done*: the Sender ID is successfully registered at the service provider and a Sender ID record is created in the System (the status appears after the user has created a Sender ID record at at [Account management\Sender IDs](#) ⁴⁴).
- c. *In progress*: the registration request is being processed in BackOffice (the BackOffice user has clicked the *Take to work* **Take to work** button).
- d. *Canceled*: the application has been canceled in the Client portal.
- e. *Rejected*: the registration request has been rejected by the System owner (*Reject application* button).
- f. *Deleted*: the Sender ID has been deleted.

Double click on an application to view its properties, proceed with its registration or reject the application.

Account management

New Sender ID Application

Morgan_morgan Freeman
Assigned to

19.12.2023 13:51
Created

19.12.2023 14:05
Updated

×

IN PROGRESS

SuperPet
Sender ID

Status

*Company

Demo AY

*Channel

RCS

Display name

SuperPet

8 / 40

Description

0 / 100

Images and color

0 / 25

Contact information

Phone number

123435678

5 / 25

Name

Mirra

5 / 25

Website

www.superpet.com

20 / 25

Visit super pet shop

20 / 25

E-mail

owner@superpet.com

0 / 25

owner@superpet.com

0 / 25

The application is assigned to you now.

Please take due actions to register the Sender ID at the provider platform(s). When ready, create the Sender ID one the planform to fulfill the application.

1

Reject application

2

Cancel

Go to sender

New Sender ID Application

Perform one of the following actions:

1. *Reject application*: the status will be changed to *Rejected*.
2. If the application has been submitted correctly, proceed to register the Sender ID at the relevant service provider. After that, click *Go to sender* to open the *Add Sender* form (available at [Account management\Sender IDs](#)). Complete the form to register the Sender ID in BackOffice.

NOTE: An application with the *Rejected* status has the *Take to work* button instead of *Go to sender*.

6.9 Printable forms

Printable forms are templates for documents generated by the System. Currently forms for invoices and charges are available. The *Account management\Printable forms* interface serves to load such templates and associate them with specific channels and legal entities.

Printable forms						
ID	Name	Type	Legal entity	Resource	Date from	Comment
121	SMS charge	charge	System owner	Sender ID setup fee	04.10.2023	
3	Default charge template	charge		SMS message		for resource "SMS message"
2	Default charge template	charge				
1	Default invoice template	invoice				

Printable forms

Initially the System has default printable forms for invoices and charges that are used if no other forms are configured for a specific channel and legal entity. Once a customized form is configured for a legal entity, it will be used by the System. If multiple forms are configured for the same channel and legal entity, the latest form will be used.

Account management

Click *Add printable form* to create a new template. Configure the fields as detailed below.

Add Printable form ×

*Type 1

Legal entity 2

*Name 3

Date from 4

Resource 5

*File 6

Comment 7

8

Add Printable form

1. *Type*: the template type. The available values are *invoice* and *charge*.
2. *Legal entity*: select the legal entity for which the template will be used.
3. *Name*: type the template name.
4. *Date from*: select the effective from date. If the template must come into effect immediately, select a date in the past.
5. *Resource* (available if *Type=charge*).
6. *File*: click on the field to open a file dialog. Select a file to upload (the file format is .odt for invoices and .xslt for charges).

NOTE: For configuring a customized template file, contact your BackOffice supplier.

7. *Comment*: enter an arbitrary comment.
8. Click *Save* to save the changes.

NOTE: To apply the new template, recalculate the invoice first.

6.10 Banks

The *Account management\Banks* interface is used to store bank profiles containing the details to be displayed in the invoices. Banks can be created by a tenant/parent reseller for their subsequent use by the reseller network consisting of sub-resellers. Bank profile serves to add own bank accounts and reseller bank accounts.

Account management

Banks					Columns	+ Add bank
ID	Name	Country	SWIFT code	Branch code		
410	Prague Financial House	Czechia	PFHBCZPP	888		
409	Vienna Credit Union	Austria	VCUBAUWW	777		
408	Seoul Metropolitan Bank	Korea (the Democratic People's Republic of)	SMKXKRSE	666		
407	Mumbai Mercantile Bank	India	MMBXINBB	555		
406	Johannesburg Capital	South Africa	JCBKZAJJ	444		
405	Shanghai Far East Bank	China	SFBKCNBJ	333		
404	Caribbean Commerce Bank	Bahamas (the)	CCBBSSSS	111		
403	Alpine Private Bank	Liechtenstein	APFLUZZ	990		
402	Southern Cross Bank	New Zealand	SCBNZJA	880		
401	Gulf States Banking Corp.	Saudi Arabia	GSBCSAJE	770		
400	Asia Pacific Commerce Bank	Hong Kong	APCBKHH	660		
399	Iberian Financial Network	Portugal	IFNPPTTP	440		
398	Nordic Capital Partners	Norway	NCPKNOKK	330		
397	Danube International Bank	Hungary	DBIHUHB	220		
396	Baltic Commerce Bank	Sweden	BCBSSESS	110		
395	InterAlliance Bank	Australia	IABKAUZZ	990		
394	WorldTrust Banking	Japan	WTBKJUT	800		

Banks

1. Click to filter the records.
2. Click to customize the display of columns.
3. Click to add a bank and proceed as described below.
4. Click on a record in the table to view the bank profile.

Click *Add bank* to add a new bank profile.

Add Bank

1

4

*Name

North Sea Banking Corp.

Description

Enter description

*Country

Netherlands (the)

*Address

Amsterdam, Damrak 92

SWIFT code

NSBCNL2A

Branch code

200

Bank code

10050000

3

2

Cancel

Save

Add Bank

1. Provide the required information:
 - o *Name*: the official registered name of the bank or financial institution.
 - o *Description*: additional bank information.
 - o *Country*: country that the bank is registered in.
 - o *Address*: bank's legal address.
 - o *SWIFT code*: a unique identifier of the bank in the SWIFT network.

Account management

- *Branch code*: a unique identifier of a specific branch of the bank.

NOTE: Fill in the SWIFT code and Branch code fields before saving the bank profile.

- *Bank code*: bank's internal code.
2. Click to clear the field.
 3. Click *Save* to save the profile or *Cancel* to discard the changes.
 4. Click to close the form.

Click on a record in the table to view the bank profile.

View Bank ID 404

Name
Caribbean Commerce Bank

Description

Country
Bahamas (the)

Address
Nassau, Bay Street 50

SWIFT code
CCBBSBS 8 / 8

Branch code
111 3 / 3

Bank code

Delete Cancel Edit

4

2

1

3

View Bank

1. Click *Edit* to start editing the profile and proceed as detailed below.
2. Click *Cancel* to close the form.
3. Click *Delete* to delete the bank profile.
4. Click to close the form.

Account management

Edit Bank ID 404

1

5

*Name
Caribbean Commerce Bank

Description
Enter description

*Country
Bahamas (the)

*Address
Nassau, Bay Street 50

SWIFT code
CCBBBSBS 8 / 8

Branch code
111 3 / 3

Bank code
Enter value

3

2

Delete 4

Cancel

Save

Edit Bank

1. Edit the information as appropriate.
2. Click *Save* to save the changes and return to the *Banks* interface.
3. Click *Cancel* to discard the changes.
4. Click *Delete* to delete a profile.
5. Click to close the form.

NOTE: If assigned full permissions the *Banks* interface is available at all levels: for tenants and resellers.

6.11 Bank accounts

The *Account management\Bank accounts* serves to manage the bank accounts of the client companies. When creating the agreement the user specifies the bank account parameters to be used in the invoices.

Bank accounts

1

2

3

4

ID	Name	Company	Legal entity	Bank
613	Canada Timber	RVV	RVV_2	InterAlliance Bank
612	UK Research	ssa_client	ssa_client_1e	Continental Trust Group
611	Chicago Investments	test_resell	test_resell	Baltic Commerce Bank
610	SV Tech	alex_k_bundle_1	alex_k_bundle_1	Gulf States Banking Corp.
609	USA Legal	RVV	RVV_2	Alpine Private Bank
608	Spain Properties	RVV	RVV_2	EuroUnited Bank
607	Vienna Business	m-partner	m-account	Seoul Metropolitan Bank
606	Dutch Trading	VA_payment	LE_VA_payment	Baltic Commerce Bank
605	Swiss Private	RVV	RVV_2	Vienna Credit Union
604	Main EUR Account	Mercedes_Spain	Mercedes_LTD Spain	Prague Financial House

Bank accounts

1. Click to filter the records.
2. Click to customize the display of columns.
3. Click to add a bank account and proceed as described below.

Account management

- Click on a record in the table to view the bank account.

Click *Add bank account* to add a new bank account.

The screenshot shows a form titled "Add Bank account". It contains several input fields and dropdown menus. Red callout boxes with numbers 1 through 4 are placed over the form: 1 is over the title, 2 is over the "Account holder" field, 3 is over the "Account number" field, and 4 is over the close button (X) in the top right corner. The fields are: *Name (text input with "Swiss Private"), *Company (dropdown with "RVV"), *Legal entity (dropdown with "RVV_2"), *Bank (dropdown with "Vienna Credit Union"), *Account holder (text input with "Alpine Wealth Management AG"), and *Account number (text input with "CH56 0483 5012 3456 7800 1"). At the bottom are "Cancel" and "Save" buttons.

Add Bank account

- Provide the required information:
 - Name*: short name of the account to be displayed in the System interfaces.
 - Company*: client company that owns the account. Select a company from the drop-down list.
 - Legal entity*: legal entity of the client company. Select a legal entity from the drop-down list of legal entities created in the [Legal entities](#) interface.
 - Bank*: bank where the account is opened. Select a bank from the drop-down list of banks created in the [Banks](#) interface.
 - Account holder*: the beneficiary name (individual or company) as registered in the bank.
 - Account number*: unique bank account number.
- Click to clear a field.
- Click *Save* to save the profile or *Cancel* to discard the changes.
- Click to close the form.

Click on a record in the table to view the bank account.

Account management

View Bank account ID 604

Name
Main EUR Account

Company
Mercedes_Spain

Legal entity
MErседes_ LTD Spain

Bank
Prague Financial House

Account holder
Schmidt Automotive GmbH

Account number
DE89 3704 0044 0532 0130 00

Delete Cancel Edit

View Bank account

1. Click *Edit* to start editing a bank account.
2. Click *Cancel* to close the form.
3. Click *Delete* to delete a bank account.
4. Click to close the form.

Edit Bank account ID 604

*Name
Main EUR Account

*Company
Mercedes_Spain

*Legal entity
MErседes_ LTD Spain

*Bank
Prague Financial House

*Account holder
Schmidt Automotive GmbH

*Account number
DE89 3704 0044 0532 0130 00

Delete Cancel Save

Edit Bank account

1. Edit the bank account information as appropriate.
2. Click *Save* to save the changes and return to the *Bank accounts* interface.
3. Click *Cancel* to discard the changes.
4. Click *Delete* to delete a bank account.
5. Click to close the form.

Account management

NOTE: If assigned full permissions the *Bank accounts* interface is available at all levels: for tenants and resellers.

Finance

7 Finance

7.1 Payments

The *Finance\Payments* page serves to track inbound and outbound payments. Payments are entered (registered) in the System manually or automatically through payment systems (payments made in the Client portal).

Payments														Columns	+ New payment
ID	Company	Agreement	Reference code	Amount	Currency	Created	Updated	Description	Direction	Payment date	Amount in agreement currency	Agreement currency	Status	Expire date of confirmation	
192	Telecom Monst...	12345 (EUR)	231313	100.00	EUR	18.11.2025 15:00	18.11.2025		---INBOUND	17.11.2025	100.00	EUR	CONFIRMED		
191	Telecom Monst...	NC-12345 (EUR)	231321	100.00	USD	24.10.2025 16:07	24.10.2025		---INBOUND	23.10.2025	90.00	EUR	EXPIRED	26.10.2025	
190	Demo AY	ACC_FOR_NN (E...	RRR-1228788889	500 000.00	EUR	08.07.2025 13:13	08.07.2025		---INBOUND	08.07.2025	500 000.00	EUR	CONFIRMED		
87	Demo AY	ACC_FOR_NN (E...	Payment_14	100.00	EUR	15.08.2024 09:52	15.08.2024		---INBOUND	15.08.2024	100.00	EUR	EXPIRED	17.08.2024	
86	Demo AY	ACC_FOR_NN (E...	Payment_13	100.00	EUR	15.08.2024 09:50	15.08.2024		---INBOUND	15.08.2024	100.00	EUR	EXPIRED	18.08.2024	
43	Telecom Monst...	NC-12345 (EUR)	5645654	0.01	EUR	12.07.2024 11:47	12.07.2024		---INBOUND	12.07.2024	0.01	EUR	CONFIRMED		
42	Telecom Monst...	NC-12345 (EUR)	44723	0.01	EUR	10.07.2024 16:53	10.07.2024		---INBOUND	10.07.2024	0.01	EUR	CONFIRMED		
41	Demo AY	ACC FOR NN (E...	Payment_12	1 000.00	EUR	10.07.2024 15:36	10.07.2024		---INBOUND	10.07.2024	1 000.00	EUR	CONFIRMED		

Payments

1. The table contains the following information:

- *ID*: payment sequence number;
- *Company*: company that a payment is associated with;
- *Agreement*: agreement with the selected company which has the balance that a payment refers to;
- *Reference code*: the identification number of a payment in the System;
- *Amount*: the sum of money that is being requested or expected to be paid;
- *Currency*: currency used for an inbound or outbound payment;
- *Created*: the date when a payment was created;
- *Updated*: the date when a payment was updated;
- *Description*: arbitrary description of a payment;
- *Direction*: the direction of a payment.
 - *Inbound*: a payment from a client to the System owner. This payment increases the client's balance by the amount specified in the payment.
 - *Outbound*: A payment from the System owner to the client. This payment reduces the client's balance by the amount specified in the payment.
- *Payment date*: the date when a payment is effected;
- *Amount in agreement currency*: replenishment amount;
- *Agreement currency*: currency specified in the agreement;
- *Status*: payment status (*Confirmed*, *Not confirmed*, *Expired* or *Canceled*);

NOTE: A payment with the *Not Confirmed* status is a payment created manually without selecting the *Payment confirmed* checkbox, or by withdrawing confirmation from an already confirmed payment. A *Not Confirmed* payment implies setting a payment confirmation date (*Confirm payment before*). Before this date the payment is reflected in the balance of the respective contract. If the payment has not been manually confirmed by a BO user before this date, it is canceled and doesn't affect the balance of the contract as if this



Finance

payment did not exist (this is important in cases when the client has already topped up the balance, but the payment has not yet arrived to the accounts of the System owner - the payment is immediately reflected on the client's balance to avoid traffic stop in case of zero balance or reaching the credit limit). Unconfirmed payment, which has already passed the deadline date of confirmation, remains registered in the System, but does not affect the balance of the contract. Such payment is still available for confirmation, which can be done by activating the corresponding checkbox: in this case it will affect the contract balance again immediately after confirmation.

NOTE: A payment has the *Confirmed* status if it is confirmed. This status means that this payment has been executed and has already arrived to the bank account of the System owner. The Confirmed status can be obtained by confirming a payment with the *Not Confirmed* status (the status will change from *Not Confirmed* to *Confirmed*) or by creating a confirmed payment manually with the *Payment confirmed* checkbox selected (the payment will be generated with the *Confirmed* status). Automatically created payments (generated when depositing through the Client Portal) are created with *Confirmed* status by default. Confirmed payment starts affecting the balance of the contract immediately after its confirmation (or after creation of such payment) and will continue to have a permanent effect on the balance until the confirmation is withdrawn or the payment is deleted from the System.

- *Expire date of confirmation:* date specified in the *Confirm payment before* parameter.

NOTE: When selecting the *Confirm payment before* date, it is recorded given the time "00:00:00".

- Click to customize the display of columns.
- Click *New payment* to register a payment manually.

Add Payment ×

***Company** Hornes and Hooves Ltd

***Payment date** 22.09.2023

Direction →Inbound

***Payment amount** 100 USD

CURRENCY EXCHANGE DETAILS

Exchange rate 1 EUR= 1.02 USD

Exchange rate date 22.09.2023

Description For the economy pack

Deferred payment ☐ **Payment confirmed**

***Agreement** 1234 - (EUR)

***Reference code** 1002

***Replenishment amount** 98 EUR

Confirm payment before 29.09.2023

Cancel
Save

Add Payment

- Company:* select the company for the payment.
- Agreement:* select the relevant agreement.
- Payment date.*

Finance

4. *Reference code*: specify the payment identification code.
5. *Direction*: possible values include:
 - a. *Inbound*: payment to the company.
 - b. *Outbound*: payment made by the company.
6. *Payment amount*: specify the amount actually paid and select its currency.
7. *Replenishment amount*: specify the amount received to the account. It is instrumental if the payment amount is in a currency other than the account currency.
8. *Currency exchange details* (available if the *Payment amount* currency is different from the account currency). The following fields are available in the section:
 - a. *Exchange rate*: the value is calculated automatically based on the values specified in the *Payment amount* and *Replenishment amount* fields.
 - b. *Exchange rate date*: specify the exchange rate date.
9. *Description*: add an arbitrary comment.
10. *Payment confirmed*: select to confirm payment.

NOTE: *Confirmed* payments and *Non Confirmed* payments up to the *Confirm payment before* date affect the client balance.

11. *Confirm payment before* (available if *Payment confirmed* is deselected): specify the date by which the payment must be confirmed.
12. Click *Save* to save the record or *Cancel* to discard the settings.

NOTE: Automatic payments are created after the balance is topped up in the Client portal *Finance* interface by pressing the *Top up balance* button. These payments have the *Confirmed* status by default. In the top up form you need to specify the contract you want to top up, the payment platform and the amount. The currency of the agreement is automatically selected as the top-up currency. When the user clicks on the *Proceed to payment* button, the System redirects the user to the URL of the selected payment platform containing all the parameters required by the System to make the payment. This URL may be obtained from the payment platform used or generated by our System. The user then makes a payment by card or other available method. After successful completion of the payment, the payment platform informs about the payment on the callback URL, after which the System automatically registers the confirmed payment, and the balance of the contract specified in the payment is topped up by the corresponding amount. After the payment is completed, the user is redirected back to the Client portal.

To edit a payment, double click on its record in the table. In the view window that appears, click *Edit*.

Finance

View Payment ID 31

Company
Hornes and Hooves Ltd

Agreement
1234 - (EUR)

Payment date
22.09.2023

Reference code
1002

Direction
→Inbound

Payment amount
100 EUR

Replenishment amount
98 EUR

Description
For the economy pack

Deferred payment
☒ Payment confirmed

Delete Cancel Edit

View Payment

You can manually confirm a payment in the BackOffice *Finance\Payments* interface. Confirmation is instrumental if the payment was created after it was made and has already arrived to the System owner's bank account - in this case it is necessary to create a confirmed payment at once. Confirmation is also necessary when the Client has made a payment, but when the payment was created the bank transaction was still being processed, in this case it is necessary to confirm the payment in the System when the System owner sees the money on his account. To confirm a payment select the *Payment confirmed* checkbox when creating a payment or editing an unconfirmed payment respectively. When a payment is confirmed, its status is set to *Confirmed*, and a notification of payment confirmation is sent to the client to the e-mail specified in the *payment_alert_emails* field of the active version of the agreement. When confirming a payment, the System checks if the selected payment affects the contract balance or not.

NOTE: You can withdraw an already confirmed payment in the BackOffice *Finance\Payments* interface. This comes in handy if the payment was confirmed by mistake. Disable the *Payment confirmed* checkbox, after which the control with the last date of payment confirmation (*Confirm payment before*) appears. After you withdraw the confirmation the payment status changes from *Confirmed* to *Not Confirmed*.

NOTE: You can delete payments only from the BackOffice *Finance\Payments* interface. Press the *Delete* button in the payment view window. When a payment is deleted, the System checks if the selected payment affects the contract balance or not.

7.2 Invoices and charges

The *Finance\Invoices and charges* interface serves to handle invoices and charges. Invoices are automatically generated by the System. Generation starts at the beginning of the billing period. An invoice can be issued for the client at any time. All billable events are included in an invoice as charges, with a delay of several minutes after the event occurs.

Finance

Invoices and charges Invoice ID 226996

ID	Agreement	Own legal entity	Direction	Type	Period	Period start	Period end	Reference #	Total due	Currency	Status	Issue date
234852	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	29.01.2025	30.01.2025		271.9900	EUR	DRAFT	
234856	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	28.01.2025	29.01.2025		142.8328	EUR	DRAFT	
234868	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	05.03.2025	06.03.2025		0.0010	EUR	DRAFT	
234870	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	06.02.2025	07.02.2025		0.1000	EUR	DRAFT	
234876	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	12.02.2025	13.02.2025		0.2000	EUR	DRAFT	
227000	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	15.01.2025	16.01.2025		0.0230	EUR	DRAFT	
227001	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	16.01.2025	17.01.2025		0.0040	EUR	DRAFT	
226995	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	20.12.2024	21.12.2024		0.0004	EUR	DRAFT	
226996	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	25.12.2024	26.12.2024		3.6216	EUR	DRAFT	
226994	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	19.12.2024	20.12.2024		5.4032	EUR	DRAFT	
237421	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	20.02.2025	21.02.2025		150.0300	EUR	DRAFT	
237420	VA_switch	VA_Switch_LE	System owner	↓ RECEIVABLE	Invoice	18.02.2025	19.02.2025		150.0000	EUR	DRAFT	
234865	VA_switch	VA_switch_2_ba...	System owner	↓ RECEIVABLE	Invoice	04.02.2025	05.02.2025		0.5500	EUR	DRAFT	

2.0.0 Invoices and charges

- Click to customize the display of columns.
- Double click or click the amount in the *Total due* column to view an invoice and charges included in it.
- Each invoice will be opened in a separate tab sheet as illustrated in the figure above.
- 2.0.0 Click to apply ascending or descending order.
- 2.0.0 Click to filter the records in the table. Click  to clear filters.

Invoices and charges

Invoice INV-1

Charge ID 7

Invoice INV-2

ID

1

Company

Demo AY

Agreement

ACC_FOR_NN

Direction

↓ Receivable

Notes

Type

Invoice

Status

Draft

Payment status

N/A

Dispute status

N/A

Period start

01.02.2023 Asia/Tomsk

Reference #

INV-1

Due date

30.03.2023

Disputed

N/A EUR

Period end

01.03.2023 Asia/Tomsk

Issue date

29.03.2023

Covered due

N/A EUR

Dispatch status

N/A

Outstanding due

N/A EUR

System est. (net)

102.46 EUR

System est. (tax)

0.00 EUR

System est. (total)

102.46 EUR

Total due

102.46 EUR

Download

Recalculate

Confirm

Confirm without sending

Save

Confirm later

Charges

Source	ID	Direction	Period start	Period end	Service	Resource	Count	Volume	System est. (net)	System est. (tax)	System est. (total)	Total due
AUTO	1	↓ RECEIVABLE	01.02.2023	01.03.2023	RCS default	203	1	1	100.00	0.00	100.00	100.00
AUTO	7	↓ RECEIVABLE	01.02.2023	01.03.2023	RCS default	201	46	46	2.30	0.00	2.30	2.30
AUTO	15	↓ RECEIVABLE	01.02.2023	01.03.2023	SMS default	101	7	14	0.16	0.00	0.16	0.16

Page 1 of 1

Show 100

Rows 1-3 of 3

Invoice and charges view

- Click on a tab to view the invoice.
- Click to go back to the table of invoices.
- Click *Edit* to modify editable parameters.
- Click *Download* to download the invoice and/or charge details. Select one of the following values:
 - Invoice* to download the invoice only (in PDF).
 - Invoice and charge details* to download the archive of charge details and invoice. 2.0.0 The invoice and charge detail fields can be customized in [Account management/Printable forms](#).

Finance

5. Enter a comment if necessary and click **Save**.
6. View the list of charges included in the invoice. Double-click on a charge to open it in a separate tab (see figure below).
7. Click *Recalculate* to update (recalculate) the invoice.
8. Click *Confirm* and select *Confirm without sending* to save the invoice. The invoice status will be changed from *Draft* to *Confirmed*.

NOTE: All invoices have the *Draft* status by default, before they are manually confirmed by a user.

To send the invoice to a client, download it as explained in step 4 above, and email it.

Invoices and charges

Charge ID 1

Invoice INV-2

ID 1	Invoice INV-1	Direction ↓ Receivable	Resource N/A
Source ⚙️ Auto	Status ✔️ Confirmed	Dispute status N/A	Counterparty est N/A EUR
Period start 01.02.2023 Asia/Tomsk	Service N/A	Due source System estimate	Disputed N/A EUR
Period end 01.03.2023 Asia/Tomsk	Version 1	Correction for -	

Count 1	Volume 1	System est. (net) 100.00 EUR	System est. (tax) 0.00 EUR	System est. (total) 100.00 EUR	Total due 100.00 EUR
------------	-------------	---------------------------------	-------------------------------	-----------------------------------	-------------------------

Charge details

Columns

Source	ID	Sender ID	Rate ID	Price type	Scale type	Scale tier	Scale group	Price	Count (billable)	Volume (billable)	Net (billable)	Tax (billable)	Total (billable)	Cr
⚙️ Auto	1	40	130	1	0			100.000000	1	1	100.000000	0.000000	100.000000	17

1

2

K < Page 1 of 1 > X

Show 100 Rows 1-1 of 17

Charge details

1. Click to open the invoice in which the charge is included.
2. The display of the detail fields may vary as depending on the resource. A special grouping by *Direction* (MT/MO), *WhatsApp region*, *Pricing category* and *Pricing type* is used for the WhatsApp Message resource.

NOTE: The corrected charge reflects the difference in the *Volume* of the resource used in the billing period, in other words it shows the difference between the old confirmed *Volume* and its recalculation for the same period.

7.3 Services

The *Services* interface serves to create rate plans offered to clients. Each service can include rate plans to one or several channels. The *Finance\Services* interface shows a table of existing services and allows creating new ones.



Finance

Services					
ID	Name	Type	Size	Currency	Actions
504	TTS	Pay-as-you-go		EUR	
503	Mobile Push	Pay-as-you-go		EUR	
502	TTS	Pay-as-you-go		EUR	   
501	WeChat	Pay-as-you-go		EUR	
500	service	Pay-as-you-go		EUR	
499	service	Unit pack	1000		
498	service	Pay-as-you-go		EUR	
497	1	Pay-as-you-go		EUR	
496	Bundle_1	Pay-as-you-go		EUR	
495	Bundle_price	Pay-as-you-go		EUR	
494	Bundle_2 - pack	Bundle Pack	10		
493	Bundle_1	Bundle Initiator			

Services

- Click to customize the display of columns.
- Hover over a record to display the edit panel. It contains the following controls:
 - Click  to clone the record. It may come handy in creating a record with similar parameters.
 - Click  to open the record for editing the service structure in the constructor.
 - Click  to view and edit the service general properties.
 - Click  to archive the record.

NOTE: When a service is archived, traffic is stopped for clients for which it is enabled. The [Enabled services](#) table will have the value *missed option <name of the removed service>*.

- Click *Add service* to create a new service.

7.3.1 Creating a service

To configure a service, follow the procedure as detailed below:

- Add a service.
 - Configure the service scope, that is, its validity period(s).
 - Configure the services and their rates. Create channels (called Service domains in the System) and assign a set of resources to them (resources are specific services such as messaging, connection fee etc., and their rates).
- To create a new service, click *Add service* and complete the fields as explained below.

Finance

Add Service
×

*Name
1

*Type
2

Pay-as-you-go

*Currency
3

EUR

Description
4

Cancel

Save

5

Add Service

1. *Name*: type the name of the service.
2. *Type*: the following service types are available:
 - a. *Pay-as-you-go*: includes flat rate and scale-based services.
 - b. *Unit pack*: a service pack containing a number of units, for example, 1000 SMS.

NOTE: A pack can include multiple channels. There is no breakdown by channel within a pack - for example, the user can send 900 SMS and 100 WhatsApp messages from a 1,000 message pack, or vice versa.

- c. *Monetary pack*: a service pack for a fixed amount, for example, 1000 USD that can be spent only on SMS.
 - d. *Bundle Initiator*: service that defines the scope of channels with applied limits.
 - e. *Bundle Pack*: service to set up the package size and the limiting resource.
3. *Currency*: select the currency for the service.

NOTE: Currency is hidden when *Type = Unit pack* is selected. Also, when *Type = Unit pack*, *Type = Monetary pack* or *Type = Bundle Pack* is selected, the *Size* control appears.

4. *Description*: add a comment if necessary.
5. Click **Save** to save the changes.

II. Once you click **Save**, you will be redirected to the service tab sheet. Create a scope as detailed below.

Finance

Create the service scope (validity period(s))

1. View the service tab. Click *Services* to return to the table of configured services.
2. View the properties of the service configured in the *Add Service* window.
3. Define the service scope - that is, its effective periods. Select *Draft* if you wish to return to defining the scope later.
4. Select the *Effective from* and *Effective till* dates.
5. Select the checkbox *Copy rate tree from* to copy the rate structure from another service.

NOTE: You can also select scope from the *Current service*.

6. Select the service in the drop-down list.
7. Click *Save* to save the changes.
8. Click *New scope* to add another validity period for the service. The button becomes active after the previous scope is set.

NOTE: Each service can only have one current scope - that is, the one active as of the current date. If a scope overlapping with the current one is created, by default the original scope remains current. To change the current scope, change the dates or set the original scope to *Draft*.

Once the scope is created, the table of resources becomes available for configuration.

III. Configure the services and their rates. This is done by creating a tree of resources. Each resource has a list of attributes that affect the service price. For example, the SMS messaging resource can have the following attributes: traffic direction (MO/MT), countries to which traffic is sent, networks (operators) within a country etc.

Finance

Select Service domain

1. Select a *Service domain* (channel):
 - a. The following Service domains are available:
 - i. *SMS messaging*;
 - ii. *RCS messaging*;
 - iii. *Viber messaging*;
 - iv. *WhatsApp messaging*;
 - v. *Service purchase*;
 - vi. *WeChat messaging*;
 - vii. *Email messaging*;
 - viii. *Flashcall message*;
 - ix. *Additional service*;
 - x. *Telegram Gateway messaging*;
 - xi. *Bundle grouping*;
 - xii. *Push messaging*;
 - xiii. *TTS messaging*;
 - xiv. *Voice calls*;
 - xv. *Push Partner messaging*;
 - b. Click  to reset the record.
 - c. Click  to save the record and proceed to the next step (next steps become available only after saving).

Once the record is saved, hover over it to view the controls:  that serves to delete the record, and  to edit it. The icon  to the left of the record means that the record lacks some critical data and the rate cannot be used.

Finance

Configure an attribute

2. Select an attribute and configure its properties:

- a. Click to select an attribute, or to select multiple attributes. For example, for *SMS messaging* the available options are:
 - i. *Sender ID usage fee*: the monthly fee for using the Sender ID.
 - ii. *Sender ID setup fee*: the one-time fee for connecting the Sender ID.

NOTE: After creating a service, go to [Account management\Sender IDs](#) ⁴⁴, hover over the relevant Sender ID and click to write-off the Sender ID setup fee. Click to configure the Sender ID usage fee rule as detailed in [Account management\Sender IDs](#) ⁴⁴. This must be done to enable write-off of the configured fees.

- iii. *SMS message*: price for the message.
- iv. *Platform fee*: fee for using the platform.

NOTE: It is recommended to set any rate value for *Others* attribute, preferably higher than the *Credit limit* value (set in the Agreement created in the [Account management\Agreements](#) ²⁹ interface), in order to avoid sending traffic if the credit limit is exceeded.

- b. *Price type*: possible values are:
 - i. *Depends on*: select to unfold the list of parameters that will define the price, and select the appropriate one as shown below:

Price type: depends on

- ii. *Flat rate*

Finance

- iii. **Scale:** the following scale types are available: *Tier* and *Back-to-First*. In the *Tier* scale the price changes after a predefined traffic threshold is reached. The cost of traffic before the threshold remains the same. In the *Back-to-First* scale, the cost of the entire traffic is recalculated after the threshold is reached. Suppose we have a scale with a threshold of 1,000 messages, and price 1 for the first 1,000 messages and price 2 for all messages beyond that. Suppose the user has sent 1,050 messages. In a *Tier* scale, the first 1,000 messages are calculated at price 1, and the remaining 50 messages at price 2. In a *Back-to-First* scale, the entire 1,050 messages are calculated at price 2. Configure the scale in the *Price* column as shown below: 1) select the scale type (*Tier* or *Back-to-First*), 2) specify the prices and threshold (hover and click between the rows to add a new tier), and 3) if necessary, select data types to which the scale will apply. If not selected, the scale will apply to all traffic.

Scale

- iv. **Free:** the service is not charged for.
- v. **Included** (available if *Type* is *Unit pack* or *Monetary pack* was selected in the *Add Service* form): when selected, traffic for the pack will be sent only if it matches the configured attributes (direction, network, region etc.)
- vi. **Not included:** the attribute is not used in this tree. It means that the billing engine will look for the rate in another tree (another rate available for the client).
- vii. **Blocked:** the billing event properties matching this attribute will not be processed.
- c. **Billing rule:** select the billing type (in case of messages, bill by submitted or by delivered).
- d. **Quantity rule:** in case of messages, select *Messages* or *Segments*.

An example of a configured resources tree is illustrated in the figure below.

Finance

Services SMS default						
ID	Name	Type	Pay-as-you-go	Currency	EUR	
Scopes						
DRAFT 08.12.2023 - = (indefinitely) CURRENT 01.01.2020 - = (indefinitely) New scope						
Resources						
SMS messaging SMS message P2A (MO) A2P (MT) 250 MTS Beeline Others Others Sender ID setup fee Sender ID usage fee Monthly Weekly Missed option: 542 Missed option: 566 Missed option: 9867 Alphanumeric Others Missed option: 456						
Price type						
by Resource by Direction (MT/MO) Free by MCC by Network name Flat rate Flat rate Flat rate Flat rate Flat rate Flat rate by Periodicity Flat rate by MNO Flat rate Flat rate by Sender ID type Flat rate Flat rate Flat rate						
Price, EUR						
0.01000 0.02000 3.00000 1.00000 100.00000 500.00000 200.00000 200.00000 300.00000 150.00000 125.00000						
Billing rule						
Submitted Default (Submitted) Default (Submitted) Default (Submitted) Default (Submitted) Default Default (Default) Default (Default) Default (Default) Default (Default) Default						
Quantity rule						
Segments Default (Segments) Default (Segments) Default (Segments) Default (Segments) Default Default (Full period) Default (Full period) Default (Full period) Default (Full period) Default (Full period)						

Resources tree

NOTE: Rate changes performed in the current scope (the one active as of today) become effective immediately after saving. Keep it in mind when editing the current tree of resources.

7.3.2 Rate import

Rate import serves to import data from a file into the service rate tree. *Import from file* (1) option facilitates manual creation of complex rate trees and helps to avoid errors affecting successful traffic flow.

Services WhatsApp

ID 915

Name WhatsApp

Type Pay-as-you-go

Currency USD

Scopes

DRAFT

15.09.2025 - = (indefinitely)

DRAFT

30.09.2025 - 06.10.2025

Draft

Effective from

30.09.2025 00:00:00

Effective till

06.10.2025 00:00:00

Cancel

Save

New scope

Resources

WhatsApp messaging

WhatsApp conversation

Price type

by Resource

Select price type

Depends on ...

Import from file

Flat rate

Scale

Free

Not included

Blocked

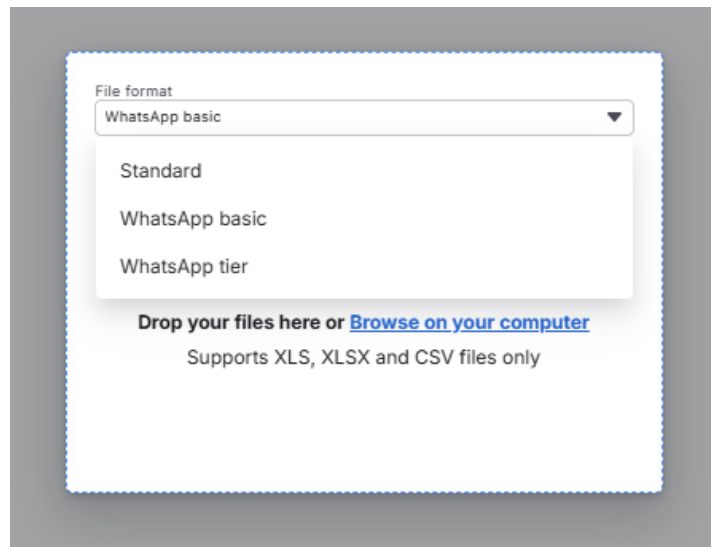
Import from file

To import rates from a file select the file type:

- Standard: applied to all other channels except WhatsApp.
- WhatsApp basic: used to import fixed Whatsapp rates by Category - Region.
- WhatsApp tier: used to import Whatsapp rates by volume tier for each Category - Region pair.

Finance

NOTE: New rates for WhatsApp messages are imported from a file according to the *Pricing type* (*Basic* and *Tier*) and *Pricing category*.



Import from file: File format

Rate import stages are as follows:

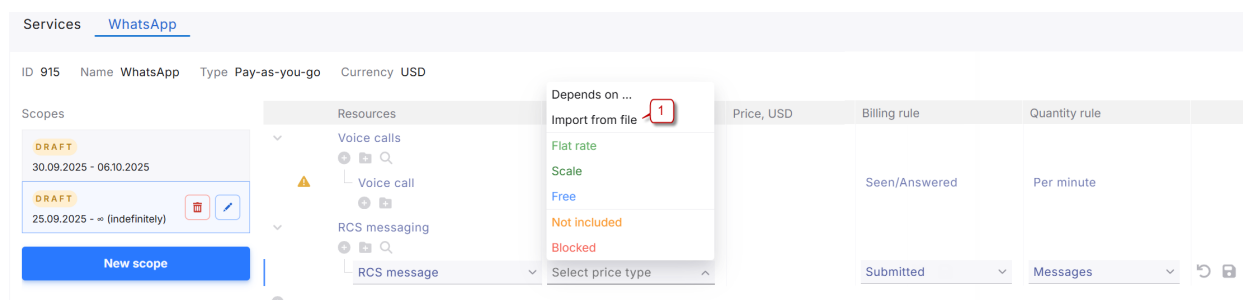
- Uploading and parsing a file;
- Configuring import settings;
- Preview of import results and error list;
- Import confirmation.

7.3.2.1 Uploading and parsing a file

Import can be performed to any node of the rate tree, starting from the second level and below.

To perform import upload a file containing the rates to the System. To do this, preset *Billing rule* and *Quantity rule* rate properties when configuring the corresponding node of the rate tree and proceed as detailed below:

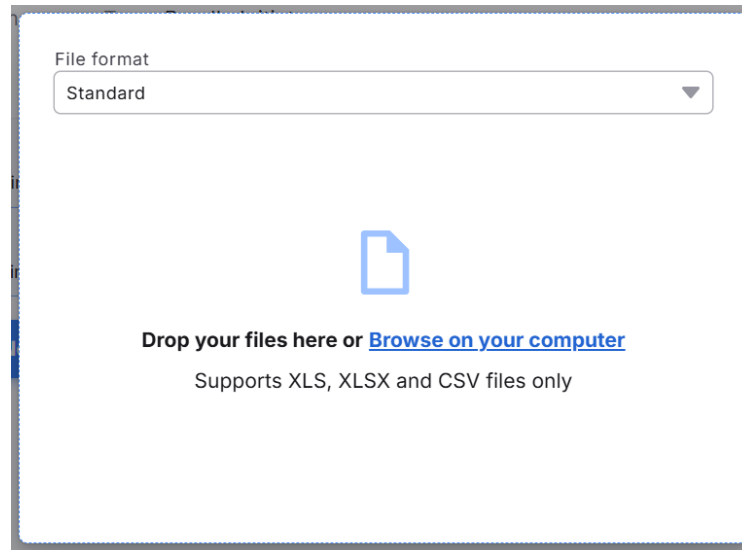
1. Select *Import from file* (1) in the *Price type* column as detailed in the figure below.



Import from file

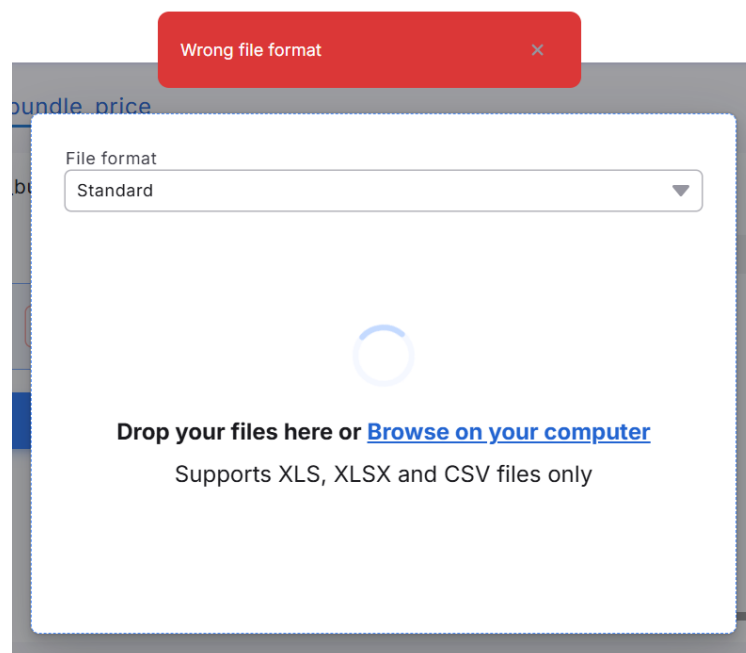
2. Select the file format (*Standard*, *WhatsApp basic* or *WhatsApp tier*) and upload a file from your device.

Finance

**Uploading a file**

NOTE: XLS, XLSX and CSV files are importable.

After the user selects a file, its parsing is performed on the platform side. If file parsing fails, a window with the text of the corresponding error appears.

**Uploading error****7.3.2.2 Configuring import settings**

After successful file parsing configure import settings in the window that opens.

The window consists of two panels: [Resource](#)^[112] that serves to preview the source file (left) and [Settings](#)^[111] that serves to configure import settings (right). The window title displays the node of the rate tree to which the import is performed.

Finance

Direction (MT/MO): A2P (MT) - Import from file

	Import as	Import as	Import as	Import as	Import as	Import as
	Number	Type	Country	Network	Price	Currency
1	123456	DID	Mexico	Cosmote	f	USD
2		DID	Mexico	All networks	0.009	USD
3	234567	TFN	Mexico	Iusacell	0.009	USD
4	765432	TFN	Mexico	Pegaso Com(Movi...	0.009	USD
5	345678	TFN	Mexico	Telcel	0.05	USD
6	876543	TFN	Mexico		0.001	USD
7						

Settings

Start row

Select start row first
Just click on the first row with actual data to import (excluding header rows)

☐ Show error (do not import)

Tree structure ⓘ

Direction (MT/MO): A2P (MT)

⚠ Select duplicate handling option
⚠ No attribute column is set, you need to set at least one
⚠ No Price column is set

Cancel Next

Rows limit 100

Import settings window

7.3.2.2.1 Import settings panel

The *Settings* panel contains the following information:

Settings

Start row 1

Duplicate handling 2

☒ Take first

☐ Take last

☐ Show error (do not import)

Tree structure ⓘ 3

Direction (MT/MO): A2P (MT)

⚠ No attribute column is set, you need to set at least one
⚠ No Price column is set

Cancel Next

Import Settings panel

1. *Start row* sets the first row from which the rate data starts. The first row can also be set by clicking on the corresponding row in the table (single click on the row).
2. *Duplicate handling* specifies how to handle duplicates found in the source file. Possible values:
 - *Take first* - take the first record found;
 - *Take last* - take last record found;

Finance

- *Show error (do not import)* - duplicate records are not imported, an error is displayed in the preliminary results pane.
- 3. *Tree structure* displays the structure of the created tree. The following properties apply:
 - Updated automatically after defining/resetting a table column;
 - Sections are arranged in the order in which the corresponding table columns were declared;
 - It is possible to manually move sections by right-clicking the section then dragging and dropping it to the necessary position;
 - It is possible to add a new section manually. Only attributes that satisfy the following properties are available for adding:
 - Attributes that have not already been explicitly declared using table columns;
 - Attributes associated with a dictionary and that dictionary has an association with at least one attribute that has been declared using a table column.
 - An option to remove manually declared sections (declared without defining the corresponding columns).

At the bottom of the *Import Settings* panel, warnings that may affect the import implementation are displayed. The following warnings can be displayed:

- Warnings that prevent proceeding to the next import step (errors). Eliminate these errors to proceed with import;
- Warnings that are informative and do not affect import success.

7.3.2.2.2 Resource panel

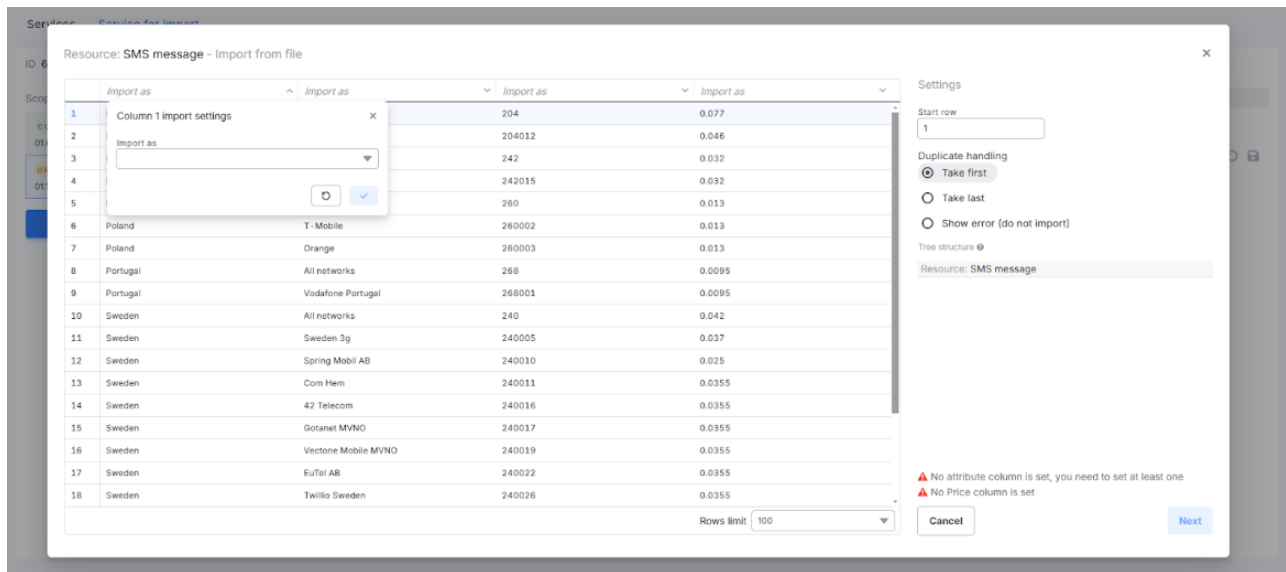
The panel contains a table with the data of the source file. The panel serves to define the names of the table columns.

7.3.2.2.2.1 Configuring imported columns

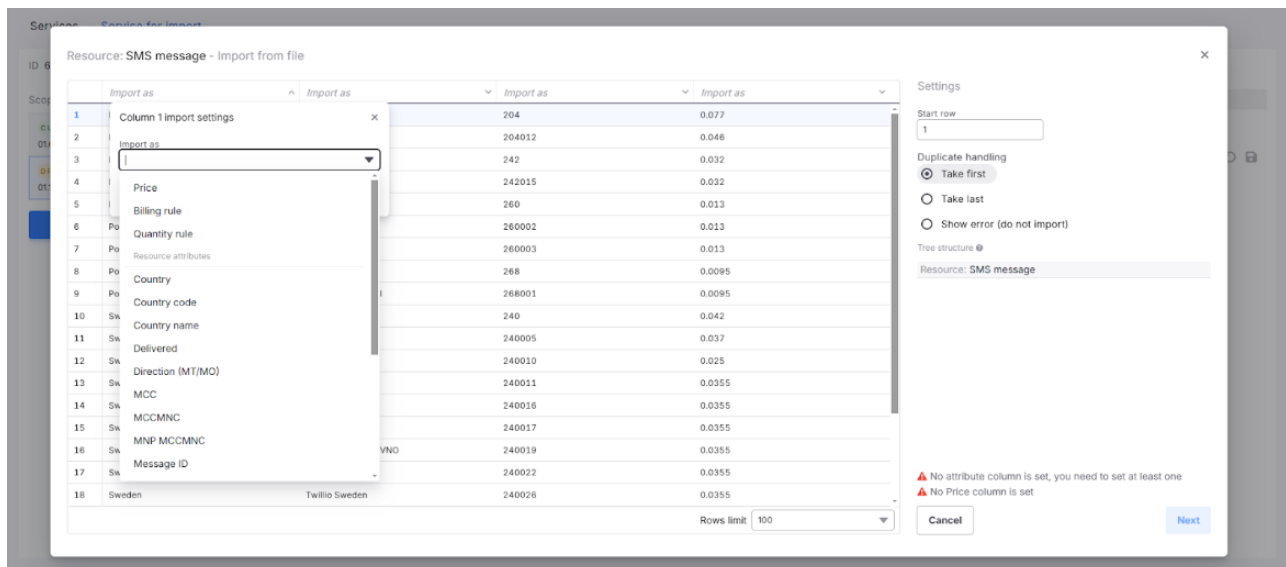
In order for the System to know where to get the country name, MCCMNC, rates, etc., specify the headings of the columns required for import by selecting the appropriate option from the context menu. This menu is called by clicking on the header of the corresponding column.

NOTE: It is not required to define all columns of the source file, as many of them contain minor properties that don't affect the import process.

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Configuring imported columns (1)



Configuring imported columns (2)

A column can be declared as containing a rate property or a resource attribute:

1. **Rate properties** (*Price*, *Price type*, *Billing rule* and *Quantity rule*) are inherent to any rate and do not affect the tree structure in any way.
2. **Resource attributes** are inherent only to the rates for a certain resource (each resource has its own set of attributes), and the rate tree is built accordingly.

A specific resource attribute may have a dictionary associated with it, in this case the attribute can only take the values that are in that dictionary.

A dictionary consists of at least a **set of keys** (for some dictionaries this is enough - for example, MCCMNC is characteristic of itself and does not need additional definitions), but most dictionaries also have **definitions**, because their keys are codes/identifiers that need additional descriptions. These descriptions are stored in definitions. A definition consists of one or more fields, which are called **dictionary attributes** (or definition attributes). Each dictionary has its own set of dictionary attributes.

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For example, in the Country dictionary, the keys are two-letter ISO country codes (*ISO 3166-1 Alpha-2 code*), but the definitions for each entry also store the below data:

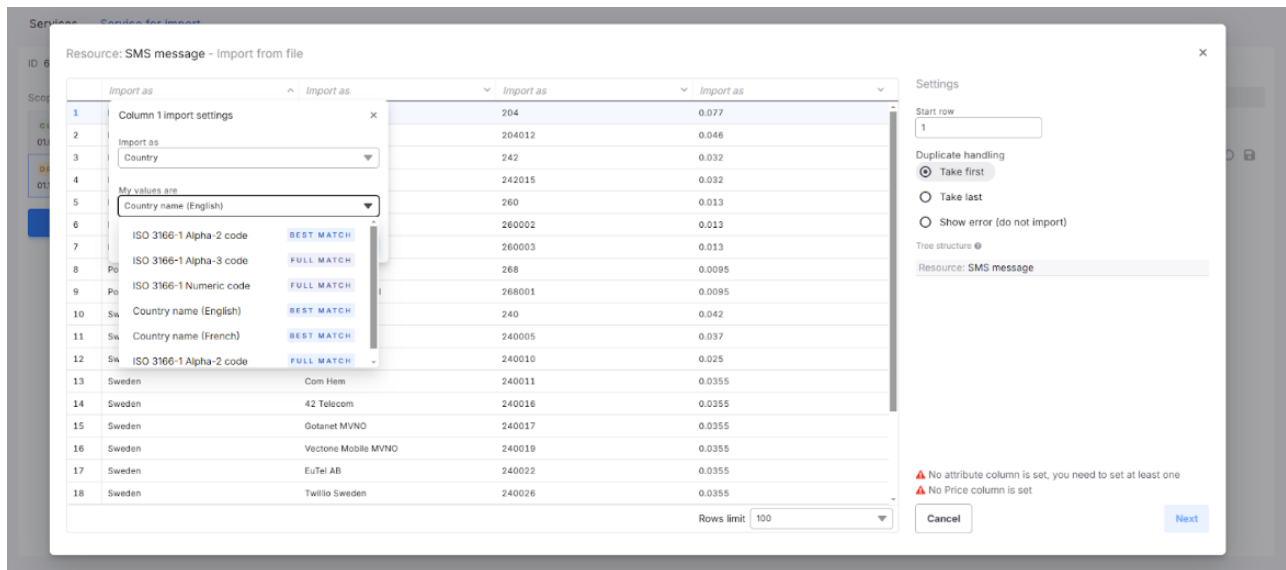
- three-letter ISO country code (*ISO 3166-1 Alpha-3 code*);
- numeric country ISO-code (*ISO 3166-1 Numeric code*);
- official name of the country in English (*Country name (English)*);
- official country name in French (*Country name (French)*).

The corresponding column in the imported file can contain both keys and any of the additional dictionary attributes - when customizing such a column, explicitly specify whether you want to search for a match by a dictionary key or by one of the dictionary attributes (if yes, then by which one).

Dictionary is not associated with the resource attribute

Dictionary without dictionary attributes is associated with the resource attribute

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Dictionary with dictionary attributes is associated with the resource attribute

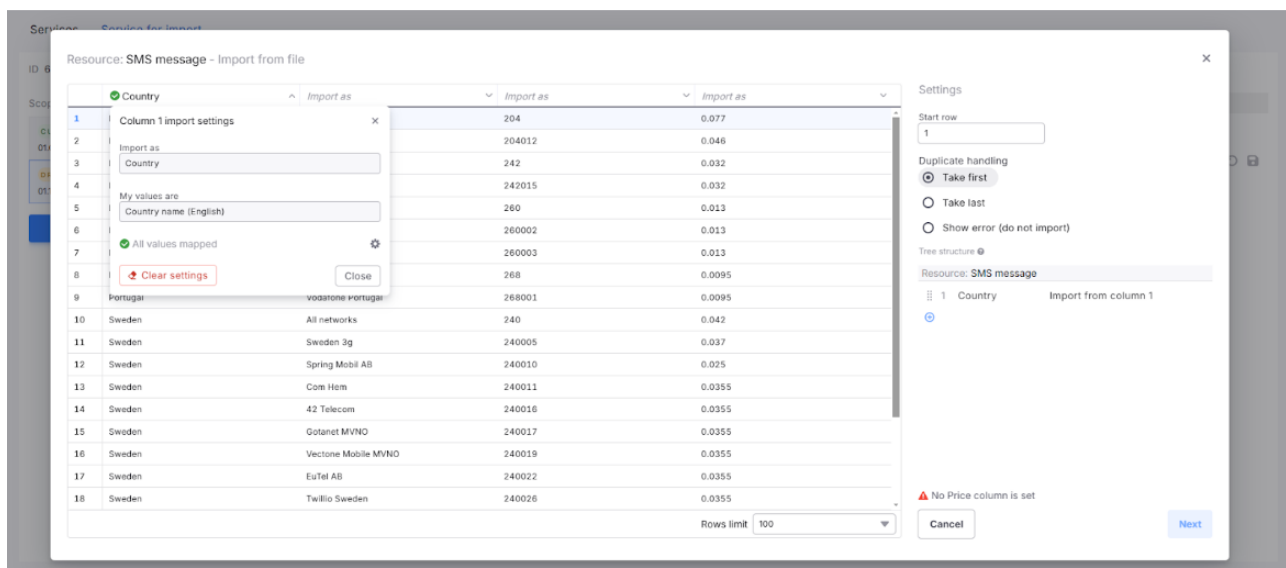
7.3.2.2.2 Automatic mapping

In case you declare a resource attribute that is associated with a dictionary, or you declare a rate property, perform automatic mapping to minimize the need for manual mapping between the file values and the dictionary values. As implied, mapping is performed automatically - when the settings of the corresponding table column are confirmed.

7.3.2.2.3 Resource attribute mapping

Automatic resource attribute mapping is performed only if the specified attribute is associated with a dictionary and the match is the value of a dictionary key.

If mapping for a column with a resource attribute is successful, no further actions with the column are required:

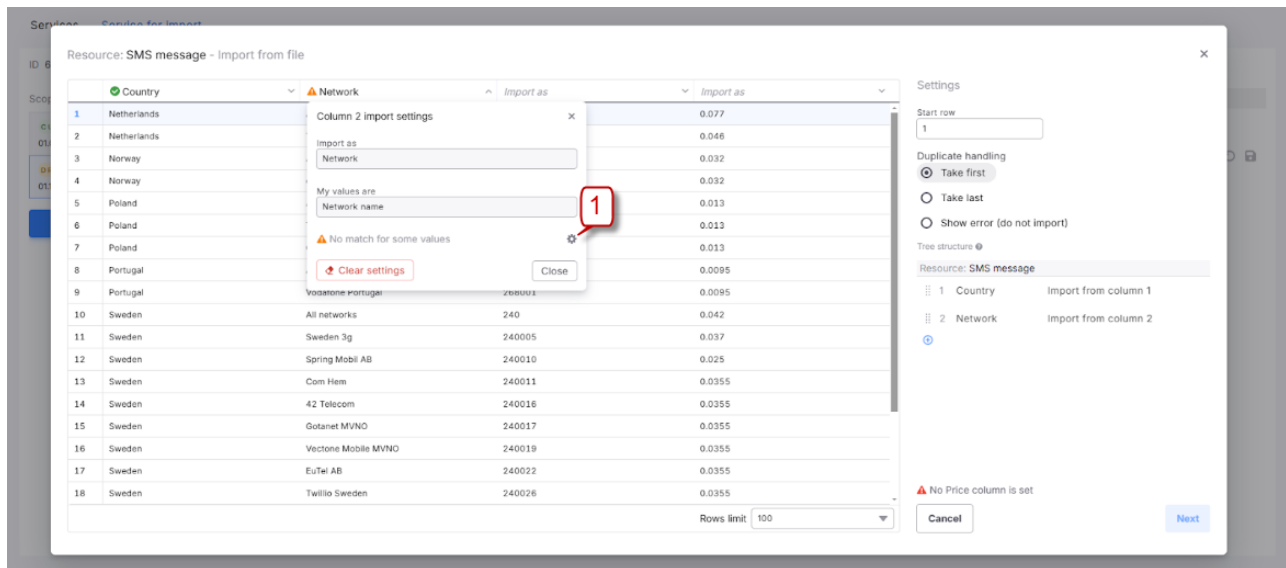


Successful mapping of column values

If no match was found for any of the column values in the dictionary with which the current resource attribute is associated, manual mapping can be performed for the unmapped values.

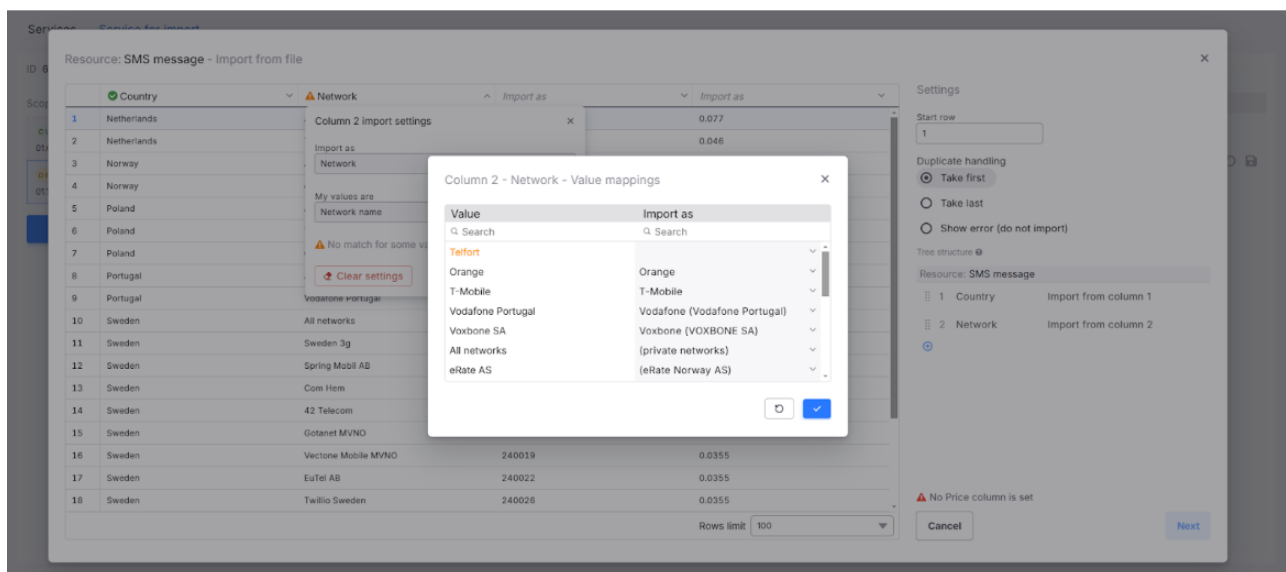
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To change the column mapping settings, click on the control (1 in the figure below) to the right of the *No match for some values* notification:



Automatic mapping found unmapped values

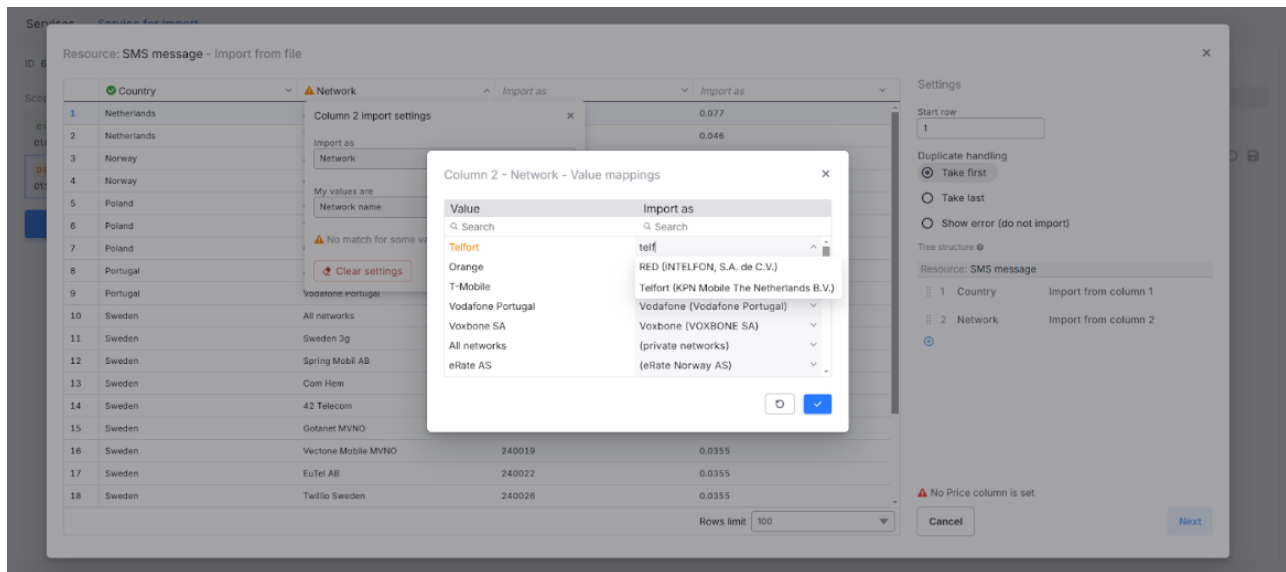
The mapping settings tab displays the correspondence of the column values to the dictionary values. Each value for which no match was found in the dictionary is highlighted in orange.



Manual mapping (1)

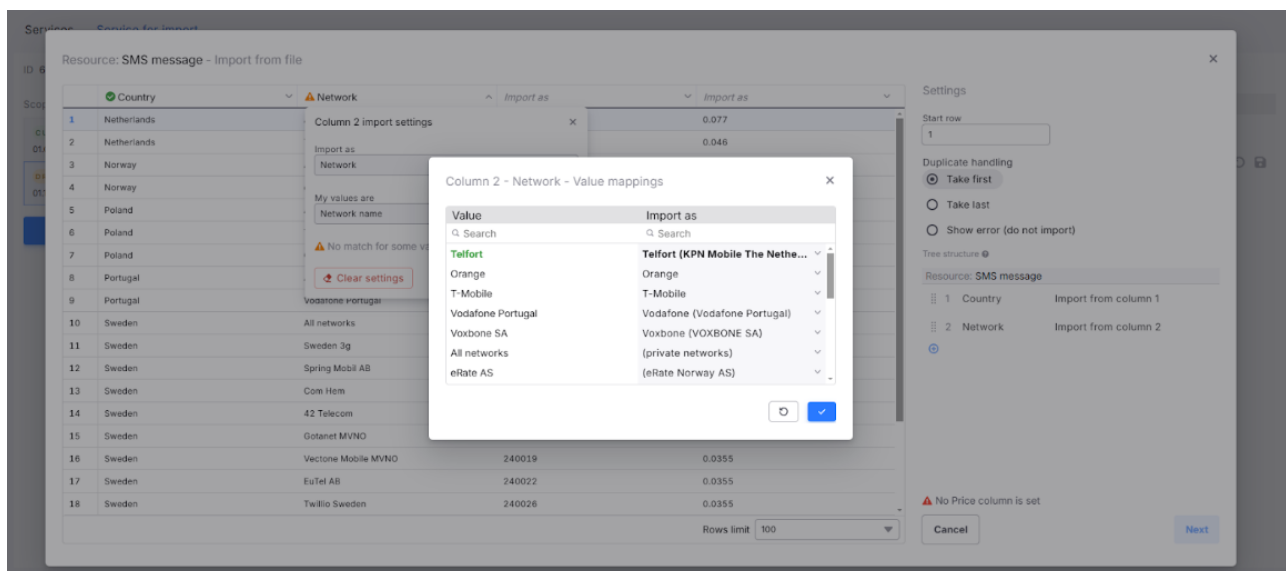
To perform manual mapping, specify which dictionary value corresponds to the given column value. For user convenience, search by incomplete matching is available.

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Manual mapping (2)

The value matched as a result of manual mapping is highlighted in green.



Manual mapping (3)

After all unmatched values have been manually mapped, click  to save the changes.

NOTE: In case the System has incorrectly specified the match for any of the column values during the automatic mapping, it is possible to specify the correct match manually (perform manual mapping). The procedure is similar to that of manual mapping for the nonmapped values (as detailed above).

7.3.2.2.4 Normalizing MCCMNC column values

TBD

7.3.2.2.5 Matching features

There are two types of matching:

- Full match - by equality (full match);

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- Best match - by the best match. The value from the cell is compared with the dictionary values and the one that is most similar to the original value is selected.

Matching is performed as follows:

- If matching is performed in the dictionary keys, the search is always performed by the dictionary keys to the full match;
- If matching is performed by a dictionary attribute, the search is performed among the values in the corresponding definitions column depending on the equality feature:
 - If more than one match is found during the full match search, the record with the smallest dictionary key value is taken;
 - If a best match search is specified, the system tries to find a full match first, if no match is found, the best match is searched;
 - If more than one match is found, the record with the smallest word key value is taken.

7.3.2.2.2.6 Rate property mapping

Automatic mapping is always performed for rate properties. The matching algorithm differs depending on the specified rate property.

The best match search is applied for the *Billing rule* and *Quantity rule* properties: first the System tries to find a full match, if no match is found, the best match is searched.

Specify the following values in the cells of the *Billing rule* column:

- Submitted;
- Delivered.

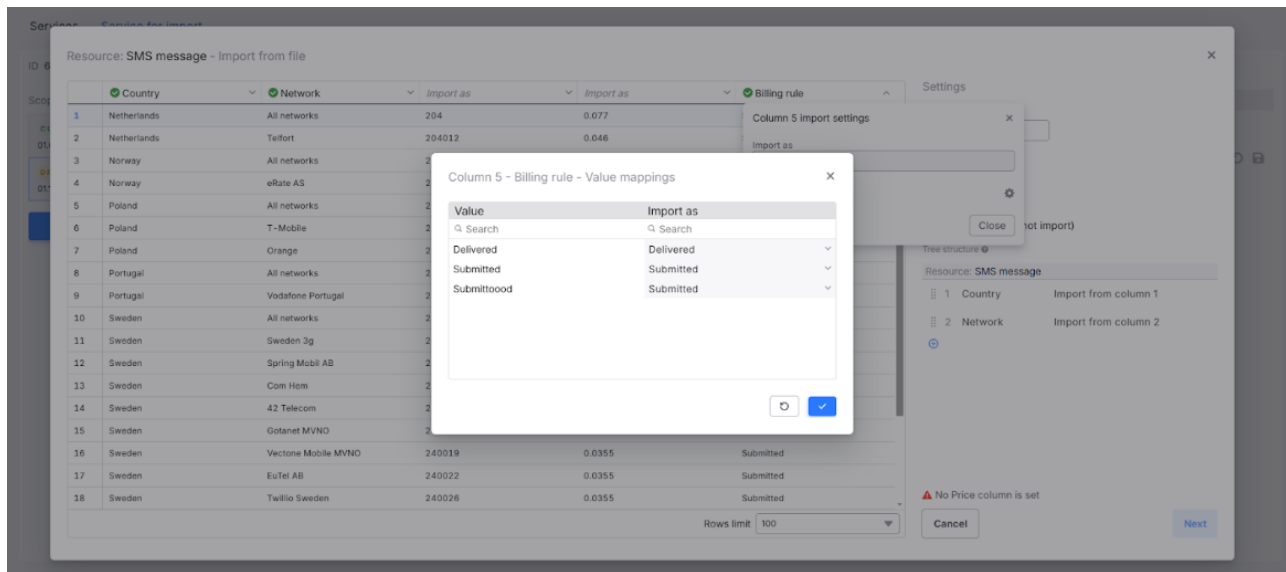
Specify the following values in the cells of the *Quantity rule* column:

- Messages;
- Segments.

	Country	Network	Import as	Import as	Billing rule
1	Netherlands	All networks	204	0.077	
2	Netherlands	Telfort	204012	0.046	
3	Norway	All networks	242	0.032	
4	Norway	eRate AS	242015	0.032	
5	Poland	All networks	260	0.013	
6	Poland	T-Mobile	260002	0.013	
7	Poland	Orange	260003	0.013	Submitted
8	Portugal	All networks	268	0.0095	Submitted
9	Portugal	Vodafone Portugal	268001	0.0095	Submitted
10	Sweden	All networks	240	0.042	Submitted
11	Sweden	Sweden 3g	240005	0.037	Submitted
12	Sweden	Spring Mobil AB	240010	0.025	Submitted
13	Sweden	Com Hem	240011	0.0355	Submitted
14	Sweden	42 Telecom	240016	0.0355	Submitted
15	Sweden	Gutemet MVNO	240017	0.0355	Submitted
16	Sweden	Vectone Mobile MVNO	240019	0.0355	Submitted
17	Sweden	EuTel AB	240022	0.0355	Submitted
18	Sweden	Twilio Sweden	240026	0.0355	Submitted

Automatic mapping for the Billing rule rate property (1)

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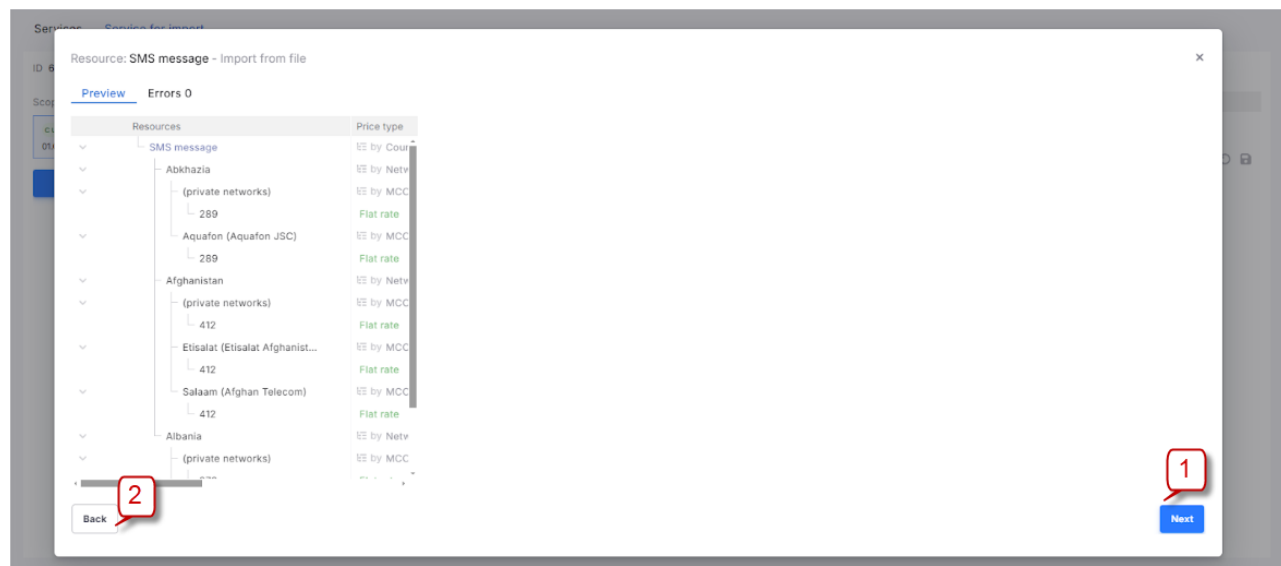
Automatic mapping for the Billing rule rate property (2)

No mapping is performed for the *Price* rate property. The task of automatic mapping for price is to identify all values that cannot be perceived as price, so that users can define mappings for them manually. Negative values are automatically converted to positive values.

7.3.2.3 Import and error list preview

After configuring the import settings and assigning the table columns, preview the rate tree created with the specified settings and the errors that were found during the creation.

The window consists of two tabs: *Preview* that serves to view the created rate tree and *Errors* that serves to view the errors found.



Import preview

1. Click *Next* to confirm import;
2. Click *Back* to go one step back to make changes in import settings or table column parameters.

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7.3.2.4 Import confirmation

If import confirmation was selected at the preview stage, the current import task is completed successfully and the generated rate tree is embedded into the corresponding node of the existing service rate tree.

The screenshot shows a web interface for 'Service for import'. It displays a table with columns: ID, Name, Type, Currency, Scopes, Resources, Price type, Price, USD, Billing rule, and Quantity rule. The 'Resources' column shows a hierarchical tree structure for SMS messaging, including countries like Afghanistan and Albania, and specific networks like Vodafone and Etisalat. The 'Price' column shows flat rates for different networks.

ID	Name	Type	Currency	Scopes	Resources	Price type	Price, USD	Billing rule	Quantity rule
647	Service for import	Pay-as-you-go	USD	01.01.2025 - = (indefinitely)	SMS messaging	by Resource			
					SMS message	by Country		Submitted	Messages
					Afghanistan	by Network			
					(private networks)	by MCC			
					412	Flat rate	0.06600	Default (Submitted)	Default (Messages)
					Salaam (Afghan Telecom)	by MCC			
					412	Flat rate	0.04500	Default (Submitted)	Default (Messages)
					Etisalat (Etisalat Afghanist...)	by MCC			
					412	Flat rate	0.04500	Default (Submitted)	Default (Messages)
					Albania	by Network			
					Vodafone (Vodafone Alban...)	by MCC			
					276	Flat rate	0.03900	Default (Submitted)	Default (Messages)
					(private networks)	by MCC			
					276	Flat rate	0.05200	Default (Submitted)	Default (Messages)

Import confirmed

7.3.3 Example 1. SMS service

Suppose we need to create an SMS service with the following parameters:

- must include MT and MO rates by country and network
- MO is free of charge
- MT is charged for
- Vodafone Spain: flat rate at 0.04 EUR. Sender ID usage fee: 10 EUR
- DIGI mobil (Best Spain Telecom): scale 0 - 1,000 SMS at 0.005 EUR, over 1,000 SMS at 0.004 EUR. Sender ID usage fee: 15 EUR, Sender ID setup fee: 50 EUR.
- Rest of Spain: flat rate at 0.08 EUR.
- Rest of the world: scale 0 - 10,000 SMS at 0,05 EUR, 10,001 - 50,000 SMS at 0,04 EUR and over 50,000 SMS at 0,03 EUR.

Proceed as follows:

1. Click *Add service* and create a service with the parameters as illustrated in the figure below.

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Add Service ×

*Name

SMS service

*Type

Pay-as-you-go

*Currency

EUR

Description

Enter description

Cancel

Save

Add SMS service

2. Configure the service scope. You may leave it in the *Draft* status to define the validity period later. Click **Save** to open the Resources tree.

Services

SMS service

ID 119

Name SMS service

Type Pay-as-you-go

Currency EUR

Scopes

+ New scope

☒ Draft

Effective from

02.11.2023 00:00:00

Effective till

∞ (indefinitely)

☐ Copy rate tree from

× Cancel

✓ Save

New scope

Create scope

3. Select *Service domain*: **SMS messaging**. Click  to save the record (save each record before proceeding to the next one):
 - a. Select *Attribute*: **SMS message**
 - b. Define *Price type*: **Depends on Direction (MT/MO)**.
 - c. Select *Billing rule*: **Submitted**.
 - d. Select *Quantity rule*: **Segments**.

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	Resources	Price type	Price, EUR	Billing rule	Quantity rule
▼	SMS messaging	by Resource			
	⚠ + ✖ 🔍 SMS message + ✖	by Direction (MT/MO)		Submitted	Segments
+					

Select Service domain

4. Configure traffic direction and country:
 - a. Click  under *SMS message* and select *Attribute: P2A (MO)*. Select *Price type: Free*.
 - b. Click  under *SMS message* and select *Attribute: A2P (MT)*. Select *Price type: Depends on Country*.
 - c. Click  under *A2P (MT)* and select *Attribute: Spain*. Select *Price type: Depends on Network*.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
▼ SMS messaging + Q ▼ SMS message + Q P2A (MO) A2P (MT) ▼ Spain + Q	⌵ by Resource ⌵ by Direction (MT/MO) Free ⌵ by Country ⌵ by Network		Submitted Default (Submitted)	Segments Default (Segments)

Configure traffic direction and country

5. Configure destinations and rates:
 - a. Click  under *Spain* and select *Attribute: Vodafone Spain*. Select *Price type: Flat rate*, *Price: 0.04*, leave *Billing rule* and *Quantity rule* fields as they are.
 - b. Click  under *Spain* and select *Attribute: DIGI mobil (Best Spain Telecom)*. Select *Price type: Scale* and configure the scale. Select *Scale type: Tier*, set the price of the first tier to *0.005* and threshold to *1,000*. Set the price of the second tier to: *0.004* and leave the threshold as it is. To apply the scale to sender IDs, select *Sender ID* in the *Counter group* list as shown in the figure below.
 - c. Set the rate for other operators in Spain. Click  under *Spain* and select *Attribute: Others*. Select *Price type: Flat rate* and set *Price* to *0.08*.
 - d. Set the rate for rest of the world. Click  under *A2P (MT)* and select *Attribute: Others*. Select *Price type: Scale* and configure the scale. Select *Scale type: Tier*, set the price of the first tier to *0.05* and threshold to *10,000*. Set the price of the second tier to: *0.04* and threshold to *50,000*. Set price of the third tier to: *0.03* and leave the threshold as it is. To apply the scale to all traffic, leave the *Counter group* field as it is.

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Resources	Price type	Price, EUR	Billing rule	Quantity rule
AZP (M1) Spain (Vodafone Spain) DIGI mobil (Best Spain Tel...) Others Others	by Country by Network Flat rate Scale Flat rate Scale	Tier 0.04000 0.00500 1 000 0.00400 ∞ Sender ID 0.08000 Tier 0.05000 10 000 0.04000 50 000 0.03000 ∞	Default (Submitted) Default (Submitted) Default (Submitted) Default (Submitted)	Default (Segments) Default (Segments) Default (Segments) Default (Segments)

Configure destinations and rates

6. Configure other payments:
 - a. Sender ID setup fee:
 - i. click  under SMS messaging and select *Attribute: Sender ID setup fee*. Define *Price type: Depends on MNO*. Set *Billing rule* and *Quantity rule* to *Default*.
 - ii. Click  under *Sender ID setup fee* and select *Attribute: Vodafone Spain*. In the *Price type* field select *Flat rate*, and in the *Price* field enter 50. Set *Billing rule* and *Quantity rule* to *Default*.
 - b. Sender ID usage fee:
 - i. Click  under SMS messaging and select *Attribute: Sender ID usage fee*. Define *Price type: Depends on MNO*. Set *Billing rule* to *Default* and *Quantity rule* to *Full period*.
 - ii. Click  under *Sender ID usage fee* and select *Attribute: Vodafone Spain*. In the *Price type* field select *Flat rate*, and in the *Price* field enter 10. Set *Billing rule* to *Default* and *Quantity rule* to *Default (Full period)*.
 - iii. Click  under *Sender ID usage fee* and select *Attribute: DIGI mobil (Best Spain Telecom)*. In the *Price type* field select *Flat rate*, and in the *Price* field enter 15. Set *Billing rule* to *Default* and *Quantity rule* to *Default (Full period)*.

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	Resources	Price type	Price, EUR	Billing rule	Quantity rule
▼	A2P (MT)	by Country			
	Spain	by Network			
	(Vodafone Spain)	Flat rate	0.04000	Default (Submitted)	Default (Segments)
	DIGI mobil (Best Spain Tel...	Scale	Tier	Default (Submitted)	Default (Segments)
			0.00500 1 000		
			0.00400 ∞		
			Sender ID		
	Others	Flat rate	0.08000	Default (Submitted)	Default (Segments)
	Others	Scale	Tier	Default (Submitted)	Default (Segments)
			0.05000 10 000		
			0.04000 50 000		
			0.03000 ∞		
▼	Sender ID setup fee	by MNO		Default	Default
	Vodafone Spain	Flat rate	50.00000	Default	Default
▼	Sender ID usage fee	by MNO		Default	Full period
	Vodafone Spain	Flat rate	10.00000	Default (Default)	Default (Full period)
	DIGI mobil	Flat rate	15.00000	Default (Default)	Default (Full period)

Configure other payments

7.3.4 Example 2. WhatsApp service

WhatsApp message pricing is based on the message category, region and volume. Please, note that volume tiers and category definition are determined solely by Meta. Therefore, message charging in the System occurs only after the message status has been received from the Meta platform.

WhatsApp messages have the following unique attributes:

- *WhatsApp region*: the region where the message is sent. Prices may vary depending on the message destination.
- *Pricing category*: categories of messages, the price is charged depending on the category:
 - *Authentication*: indicates an authentication template message.
 - *Authentication international*: indicates an authentication template message sent to a WhatsApp user in a country or region that has authentication-international rates.
 - *Marketing*: indicates a marketing template message.
 - *Marketing lite*: indicates a marketing template sent via Marketing Messages Lite API.
 - *Utility*: indicates a utility template message.
 - *Service*: indicates a non-template message.
 - *Referral conversion*: indicates the message is part of a free entry point conversation.
- *Pricing type*:
 - *Regular*: indicates the message is billable.
 - *Free customer service*: indicates the message is free because it was either a utility template message or non-template message sent within a customer service window.
 - *Free entry point*: indicates the message is free because it is part of a free-entry point conversation.

Suppose we need to create a WhatsApp service with the following parameters:

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- Message rates for Argentina are as follows:
 - For the Utility Category:
 - From 0 to 100,000 messages: \$0.0289;
 - From 100,001 to 1,000,000: \$0.0275;
 - From 1,000,001 to 4,500,000: \$0.0260;
 - From 4,500,001 to 15,000,000: \$0.0246;
 - From 15,000,001 to 30,000,000: \$0.0231;
 - over 30,000,001: \$0.0217.
 - For the Authentication Category:
 - From 0 to 120,000 messages: \$0.0289;
 - From 120,001 to 400,000: \$0.0275;
 - From 400 001 to 1 000 000: \$0.0260;
 - From 1,000,001 to 5,000,000: \$0.0246;
 - From 5,000,001 to 10,000,000: \$0.0231;
 - over 10,000,001: \$0.0217.
 - For the Authentication international Category:
 - Single price is \$0.0280;
 - For the Marketing Category:
 - Fixed price is \$0.0618.
 - For the Service category:
 - Free.

Message rates for Egypt are as follows:

- For the Utility Category:
 - from 0 to 100,000 messages: \$0.0052;
 - from 100,001 to 1,000,000: \$0.0049;
 - from 1,000,001 to 4,500,000: \$0.0047;
 - from 4,500,001 to 40,000,000: \$0.0044;
 - from 40,000,001 to 80,000,000: \$0.00421;
 - over 80,000,001: \$0.0039.
- For the Authentication Category:
 - from 0 to 300,000 messages: \$0.0052;
 - from 300,001 to 2,000,000: \$0.0049;
 - from 2,000,001 to 10,000,000: \$0.0047;

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- from 10,000,001 to 20,000,000: \$0.0044;
- from 20,000,001 to 40,000,000: \$0.0042;
- over 40,000,001: \$0.0039.
- For the Authentication international Category:
 - from 0 to 300,000 messages: \$0.0650;
 - from 300,001 to 2,000,000: \$0.0618 \$;
 - from 2,000,001 to 10,000,000: \$0.0585;
 - from 10,000,001 to 20,000,000: \$0.0553;
 - from 20,000,001 to 40,000,000: \$0.0520;
 - over 40,000,001: \$0.0488.
- For the Marketing Category:
 - Fixed price is \$0.1073.
- For the Service category:
 - Free.

Proceed as follows:

1. Click *Add service* and create a service with the parameters as illustrated in the figure below.

Add Service
×

*Name

*Type

Pay-as-you-go ▼

*Currency

EUR ▼

Description

Enter description

Cancel

Save

Add WhatsApp service

2. Configure the service scope as detailed in [Creating a service](#)¹⁰²¹. You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the Resources tree.
3. Select *Service domain: WhatsApp messaging* and click  to save the value:
 - a. Click  under *WhatsApp messaging* and select *Attribute: WhatsApp message*.
 - b. Define *Price type: Depends on....* Select *WhatsApp region* in the drop-down list.

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- c. Set *Billing rule* to *Submitted* and *Quantity rule* to *Messages*.
- d. Click  to save the configurations.

Resources	Price type	Price, USD	Billing rule	Quantity rule
WhatsApp messaging	by Resource			
WhatsApp message	by WhatsApp region		Submitted	Messages

Select Service domain and configure WhatsApp messages

4. Click  under *WhatsApp message* and select *Attribute: Argentina*. Select *Price type: Depends on Pricing category*.
5. Configure WhatsApp message types:
 - a. Click  under *Argentina* and select *Attribute: Authentication*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Scale*. Select *Scale type: Tier*. Configure message volumes:
 - i. Price: 0.0289, Tier #1: 120 000;
 - ii. Price: 0.0275, Tier #2: 400 000;
 - iii. Price: 0.0260, Tier #3: 1 000 000;
 - iv. Price: 0.0246, Tier #4: 5 000 000;
 - v. Price: 0.0231, Tier #5: 10 000 000;
 - vi. Price: 0.0217, Tier #6: ∞.
Set the *Billing rule* and *Quantity rule* fields to *Default*.
 - b. Click  under *Argentina* and select *Attribute: Utility*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Scale*. Select *Scale type: Tier*. Configure message volumes:
 - i. Price: 0.0289, Tier #1: 100 000;
 - ii. Price: 0.0275, Tier #2: 1 000 000;
 - iii. Price: 0.0260, Tier #3: 4 500 000;
 - iv. Price: 0.0246, Tier #4: 15 000 000;
 - v. Price: 0.0231, Tier #5: 30 000 000;
 - vi. Price: 0.0217, Tier #6: ∞.
Set the *Billing rule* and *Quantity rule* fields to *Default*.
 - c. Click  under *Argentina* and select *Attribute: Authentication international*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Flat rate* and set *Price* to 0.0280. Set the *Billing rule* and *Quantity rule* fields to *Default*.

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- d. Click  under *Argentina* and select *Attribute: Marketing*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Flat rate* and set *Price* to 0.0618. Set the *Billing rule* and *Quantity rule* fields to *Default*.
- e. Click  under *Argentina* and select *Attribute: Service*. Select *Price type: Free*. Set the *Billing rule* and *Quantity rule* fields to *Default*.
- f. Click  under *Argentina* and select *Attribute: Others*. Select *Price type: Free*. Set the *Billing rule* and *Quantity rule* fields to *Default*.

NOTE: The *Pricing* category is determined instantly if the message is sent from the System. When sending a message via omni-API, the message will only be assigned a category after receiving status from Meta. To avoid pricing issues, it is essential that a rate is assigned for the *Others* category. Any value can be set for this category; it will not affect the balance until the message category is received from Meta.

Resources	Price type	Price, USD	Billing rule	Quantity rule
WhatsApp messaging	by Resource			
WhatsApp message	by WhatsApp region		Submitted	Messages
Argentina	by Pricing category			
Authentication	by Pricing type			
Regular	Scale	Tier 0.02890 120 000 0.02750 400 000 0.02600 1 000 000 0.02460 5 000 000 0.02310 10 000 000 0.02170 ∞	Default (Submitted)	Default (Messages)
Utility	by Pricing type			
Regular	Scale	Tier 0.02890 100 000 0.02750 1 000 000 0.02600 4 500 000 0.02460 15 000 000 0.02310 30 000 000 0.02170 ∞	Default (Submitted)	Default (Messages)
Authentication international	Flat rate	0.28000	Default (Submitted)	Default (Messages)
Marketing	Flat rate	0.61800	Default (Submitted)	Default (Messages)
Others	Free		Default (Submitted)	Default (Messages)

Configure WhatsApp service for Argentina

6. Click  under *WhatsApp message* and select *Attribute: Egypt*. Select *Price type: Depends on Pricing category*.
7. Configure WhatsApp message types:
 - a. Click  under *Egypt* and select *Attribute: Authentication*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Scale*. Select *Scale type: Tier*. Configure message volumes:

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- i. Price: 0.0052, Tier #1: 300 000;
- ii. Price: 0.0049, Tier #2: 2 000 000;
- iii. Price: 0.0047, Tier #3: 10 000 000;
- iv. Price: 0.0044, Tier #4: 20 000 000;
- v. Price: 0.0042, Tier #5: 40 000 000;
- vi. Price: 0.0039, Tier #6: ∞ .

Set the *Billing rule* and *Quantity rule* fields to *Default*.

- b. Click  under *Egypt* and select *Attribute: Utility*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Scale*. Select *Scale type: Tier*. Configure message volumes:

- i. Price: 0.0052, Tier #1: 100 000
- ii. Price: 0.0049, Tier #2: 1 000 000
- iii. Price: 0.0047, Tier #3: 4 500 000
- iv. Price: 0.0044, Tier #4: 40 000 000
- v. Price: 0.0042, Tier #5: 80 000 000
- vi. Price: 0.0039, Tier #6: ∞ .

Set the *Billing rule* and *Quantity rule* fields to *Default*.

- c. Click  under *Egypt* and select *Attribute: Authentication international*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Scale*. Select *Scale type: Tier*. Configure message volumes:

- i. Price: 0.0650, Tier #1: 300 000;
- ii. Price: 0.0618, Tier #2: 2 000 000;
- iii. Price: 0.0585, Tier #3: 10 000 000;
- iv. Price: 0.0553, Tier #4: 20 000 000;
- v. Price: 0.0520, Tier #5: 40 000 000;
- vi. Price: 0.0488, Tier #6: ∞ .

Set the *Billing rule* and *Quantity rule* fields to *Default*.

- d. Click  under *Egypt* and select *Attribute: Marketing*. Select *Price type: Depends on Pricing type*. Click  under *Regular* and select *Price type: Flat rate* and set *Price* to 0.1073. Set the *Billing rule* and *Quantity rule* fields to *Default*.
- e. Click  under *Egypt* and select *Attribute: Service*. Select *Price type: Free*. Set the *Billing rule* and *Quantity rule* fields to *Default*.

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- f. Click  under *Egypt* and select *Attribute: Others*. Select *Price type: Free*. Set the *Billing rule* and *Quantity rule* fields to *Default*.

Finance

Resources	Price type	Price, USD	Billing rule	Quantity rule	
WhatsApp messaging	by Resource				
WhatsApp message	by WhatsApp region		Submitted	Messages	
Argentina	by Pricing category				
Authentication	by Pricing type				
Regular	Scale	Tier 0.02890 120 000 0.02750 400 000 0.02600 1 000 000 0.02460 5 000 000 0.02310 10 000 000 0.02170 ∞	Default (Submitted)	Default (Messages)	
Utility	by Pricing type				
Regular	Scale	Tier 0.02890 100 000 0.02750 1 000 000 0.02600 4 500 000 0.02460 15 000 000 0.02310 30 000 000 0.02170 ∞	Default (Submitted)	Default (Messages)	
Authentication international	Flat rate	0.28000	Default (Submitted)	Default (Messages)	
Marketing	Flat rate	0.61800	Default (Submitted)	Default (Messages)	
Others	Free		Default (Submitted)	Default (Messages)	
Egypt	by Pricing category				
Authentication	by Pricing type				
Regular	Scale	Tier 0.00520 10 000 0.00490 2 000 000 0.00470 10 000 000 0.00440 20 000 000 0.00420 40 000 000 0.00390 ∞	Default (Submitted)	Default (Messages)	
Utility	Scale	Tier 0.00520 100 000 0.00490 1 000 000 0.00470 4 500 000 0.00440 40 000 000 0.00420 80 000 000 0.00390 ∞	Default (Submitted)	Default (Messages)	
Authentication international	Scale	Tier 0.06500 300 000 0.06180 2 000 000 0.05850 10 000 000 0.05530 20 000 000 0.05200 40 000 000 0.04880 ∞	Default (Submitted)	Default (Messages)	
Marketing	Flat rate	0.10730	Default (Submitted)	Default (Messages)	
Service	Free		Default (Submitted)	Default (Messages)	
Others	Free		Default (Submitted)	Default (Messages)	

Configure WhatsApp service for Argentina and Egypt

Finance

7.3.5 Example 3. Creating a RCS service

A RCS service has the following attributes:

1. Message Type:

- a. *Basic*: text messages containing no more than 240 characters.
- b. *Conversations*: RCS session active for 24 hours
- c. *Single*: message containing media/buttons/reach cards/text of more than 240 characters.

Suppose we need to create an RCS service with the following parameters:

- includes three types of MT rates by country;
- MT basic message is charged for:
 - Spain: flat rate at 0.04 EUR;
 - Italy: 0.05 EUR;
 - France: 0.034 EUR.
- MT conversation is charged for:
 - Spain: flat rate at 0.08 EUR;
 - Italy: flat rate at 0.088 EUR;
 - France: flat rate at 0.09 EUR.
- MT single message is charged for:
 - Spain: flat rate at 0.93 EUR;
 - Italy: flat rate at 0.089 EUR;
 - France: flat rate at 1 EUR.

Proceed as follows:

1. Click *Add service* and create a service with the parameters as illustrated in the figure below.

Finance

Add Service



*Name

RCS mes

*Type

Pay-as-you-go

*Currency

USD

Description

RCS service for Spain, Italy and France

Cancel

Save

Add RCS service

2. Configure the service scope as detailed in [Creating a service](#)¹⁰². You may leave it in the *Draft* status to define the validity period later. Click **Save** to open the Resources tree.
3. Select *Service domain: RCS messaging* and click  to save the value:
 - a. Click  under *RCS messaging* and select *Attribute: RCS message*.
 - b. Define *Price type: Depends on....* Select *Billing event* in the drop-down list.
 - c. Set *Billing rule* to *Delivered* and *Quantity rule* to *Messages*.
 - d. Click  to save the configurations.
4. Configure *RCS message* attributes:
 - a. Click  under *RCS message* and select *Attribute: Basic*. Select *Price type: Depends on Country*.
 - Click  under *Basic* and select *Attribute: Spain*. Select *Price type: Flat rate*. Specify the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
 - Click  under *Spain* and select *Attribute: Italy*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.



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- o Click  under *Italy* and select *Attribute: France*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
- b. Click  under *RCS message* and select *Attribute: Conversation*. Select *Price type: Depends on Country*.
 - o Click  under *Conversation* and select *Attribute: Spain*. Select *Price type: Flat rate*. Specify the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
 - o Click  under *Spain* and select *Attribute: Italy*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
 - o Click  under *Italy* and select *Attribute: France*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
- c. Click  under *RCS message* and select *Attribute: Single*. Select *Price type: Depends on Country*.
 - o Click  under *Single* and select *Attribute: Spain*. Select *Price type: Flat rate*. Specify the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
 - o Click  under *Spain* and select *Attribute: Italy*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
 - o Click  under *Italy* and select *Attribute: France*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.
- d. Click  under *RCS message* and select *Attribute: Others*. Select *Price type: Flat rate*. Enter the respective value. Set the *Billing rule* and *Quantity rule* fields to *Default*. Click  to save the configurations.

Finance

	Resources	Price type	Price, USD	Billing rule	Quantity rule	
▼	RCS messaging	by Resource				
	⊕ 🗑 🔍					
▼	└ RCS message	by Billing event		Delivered	Messages	
	⊕ 🗑 🔍					
▼	└ Basic	by Country				
	⊕ 🗑 🔍					
	└ Spain	Fiat rate	0.04000	Delivered	Default (Messages)	
	└ Italy	Fiat rate	0.05000	Default (Delivered)	Default (Messages)	
	└ France	Fiat rate	0.03400	Default (Delivered)	Default (Messages)	
▼	└ Conversation	by Country				
	⊕ 🗑 🔍					
	└ Spain	Fiat rate	0.08000	Default (Delivered)	Default (Messages)	
	└ Italy	Fiat rate	0.08800	Default (Delivered)	Default (Messages)	
	└ France	Fiat rate	0.09000	Default (Delivered)	Default (Messages)	
▼	└ Single	by Country				
	⊕ 🗑 🔍					
	└ Spain	Fiat rate	0.09300	Default (Delivered)	Default (Messages)	
	└ Italy	Fiat rate	0.08900	Default (Delivered)	Default (Messages)	
	└ France	Fiat rate	1.00000	Default (Delivered)	Default (Messages)	
	└ Others	Fiat rate	1.50000	Default (Delivered)	Default (Messages)	

Configure RCS service

7.3.6 Example 4. Creating a pack

Suppose we need to create a message pack for SMS and WhatsApp channels.

Suppose the rate will have the following parameters:

- Channels: SMS and WhatsApp;
- Number of messages: 1,000;
- Cost of pack: 10 EUR;
- Destination: USA.

The procedure involves the following three steps:

- I. Create the pack service itself (no rate is added at this point).
- II. Create a pay-as-you go service that contains the rate for the pack. The user can create one such service for all packs in the same currency.
- III. Associate the pack from step 1 with the relevant agreement.

I. Create a pack service:

1. Click *Add service* and create a service with the parameters as illustrated in the figure below. Set *Type* to *Unit pack*.

Finance

Add Service



*Name

USA SMS&WA Pack

*Type

Unit pack

*Currency

EUR

*Size

1 000

Description

SMS and WhatsApp messages

Cancel

Save

Add pack

2. Configure the service scope. You may leave it in the *Draft* status to define the validity period later. Click **Save** to open the Resources tree.

Scopes

+ New scope

☒ Draft

Effective from
10.11.2023 00:00:00

Effective till
∞ (indefinitely)

☐ Copy rate tree from

× Cancel

✓ Save

New scope

Create scope

3. Select *Service domain*: **SMS messaging**. Click  to save the record (save each record before proceeding to the next one):
 - a. Select *Attribute*: **SMS message**



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- b. Define *Price type*: *Depends on Country*.
- c. Select *Billing rule*: *Submitted*.
- d. Select *Quantity rule*: *Segments*.

Resources	Status	Billing rule	Quantity rule
SMS messaging SMS message	by Resource by Country	Submitted	Segments

Select Service domain

4. Configure the destination country:

- a. Click  under *SMS message* and select *Attribute: United States of America (the)*. Select *Price type: Included* (it means that traffic for the pack will be sent to the USA only).

Resources	Status	Billing rule	Quantity rule
SMS messaging SMS message United States of America (...)	by Resource by Country Included	Submitted Default (Submitted)	Segments Default (Segments)

Configure destination country

II. Create a pay-as-you go service that will contain the pack price:

1. Create a service that will store prices for all unit packs in the EUR currency. For your convenience it is recommended to list the pack names the prices for which are stored in this service, in the *Description* field.

Add Service

Name

EUR pack prices

Type

Pay-as-you-go

Currency

EUR

Description

North America SMS&WA Pack, Europe WA 1000 EUR pack

Cancel

Save

Add a pay-as-you-go service

2. Configure the service scope. You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the Resources tree.
3. Select *Service domain*: *Service purchase*.

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- Click  under *Service purchase* and select *Attribute: Unit pack*. Select *Price type: Depends on Pack*. Set the *Billing rule* and *Quantity rule* fields to *Default*.
- Click  under *Unit pack* and select *Attribute: <Name of the pack>* (in our example, *USA SMS&WA Pack*). Define *Price type: Flat rate* and set *Price* to *100*. Set the *Billing rule* and *Quantity rule* fields to *Default*.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
Service purchase	by Resource			
Unit pack	by Pack		Default	Default
USA SMS&WA Pack	Flat rate	100.00000	Default (Default)	Default (Default)

Configuring the resources tree

III. Associate the pack from step 1 with the relevant agreement:

- Go to [Account management\Enabled packs](#)³⁸. Click *Add enabled pack*.
- Select the pack in the *Service (pack)* field.
- In the *Agreement* field, select the agreement with which the pack must be associated.
- Select *Free of charge* for a free pack and *Charge* for a billable pack. If *Charge* is selected, the pack's cost will be displayed.

NOTE: The the pack's cost will be shown if a) the service Scope is not in the *Draft* status (refer to [Finance\Services\Creating a service](#)¹⁰²) b) the pack is effective as of the current date c) the pay-as-you-go service created at step II is also effective as of the current date. Otherwise, *Rate not found* will be displayed.

NOTE: When creating a free of charge pack, skip step II.

- Click *Save* to save the changes.

Finance

X

Add Enabled pack

***Service (pack)**

USA SMS&WA Pack
▼

***Agreement**

Hornes and Hooves Ltd - 1234 - (EUR)
▼

***Effective from ⓘ**

Now
📅

Timezone

Europe/Moscow +03:00
▼

Effective till ⓘ

∞ (indefinitely)
📅

Timezone

Europe/Moscow +03:00
▼

***Billing**

☐ Free of charge
☒ Charge

✔ 123.00 EUR

Effective: 08.12.2023 00:00:00

Cancel

Save

Enabling a pack

7.3.7 Example 5. Creating a bundle pack

The bundle pack allows the System owner/reseller to charge an additional fee on top of the basic message rate. The bundle resource is the unique subscriber numbers that messages are sent to. When the limit of unique contacts is reached, messaging does not stop, but is charged differently with an additional cost for each new unique contact outside the limit.

Suppose the bundle pack has the following parameters:

- Channels: SMS and WhatsApp;
- Pack price: 100 EUR;
- Bundle Pack size: 1000;
- Price per message (Pay-as-you-go service): 0.2 EUR;
- Price for contact over limit: 1 EUR.

For example, a reseller sells a client a bundle pack for 100 EUR for 1,000 contacts. The cost per an SMS message according to the rate tree is 0.2 EUR. Once 1,000 contacts are reached, traffic continues to flow to new contacts, but is charged at 0.2 EUR + 1 EUR as a one-time overage fee for each new contact. Be noted that messages are charged using the PAYG service, and the bundle pack limits the number of unique contacts.

In the case of 1,200 SMS messages (one text message from each contact) from unique contacts, 1,000 SMS messages are charged according to the current rate tree ($0.2 * 1,000$) and the remaining 200 are billed as indicated in the Price parameter ($((1 + 0.2) * 200)$). The client will be charged 440 EUR.

The three following entities are required for this model:

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Bundle initiator: a service that determines which resources will be subject to bundle restrictions (Channels). For example, SMS messages and WA messages. If a resource is missing from this service, in our example it is RCS messages, then traffic on the RCS channel will not be affected by the bundle.

Bundle pack: a service that sets a limit on the number of contacts (Usage).

Pay-as-you-go (PAYG): a service to which all of the above services are connected. It may or may not contain a rate tree (in which case, another PAYG service associated with the same agreement will be used for billing).

The procedure of creating a bundle pack involves the following steps:

- I. Create the pack service itself (no rate is added at this point).
- II. Create a pay-as-you go service that contains the rate for the pack. The user can create one such service for all packs in the same currency.
- III. Associate the services from step 1 with the relevant agreement.

I. Create a pack service:

1. Click *Add service* and create a new *Bundle Initiator* service.

Add Service

*Name

Bundle_1

*Type

Bundle Initiator

Description

SMS and WhatsApp messages

Cancel

Save

Add Bundle Initiator service

2. Configure the service resources and destinations as detailed in [Creating a service](#)¹⁰². You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the *Resources tree*.

Finance

Resources	Status
SMS messaging SMS message	by Resource Included
WhatsApp messaging WhatsApp message WhatsApp conversation	by Resource Included Included

Create scope

3. Create a new *Bundle pack* service.

Add Service



*Name

Bundle_2_pack

*Type

Bundle Pack

*Size

100

Description

SMS and WhatsApp messages

Cancel

Save

Add Bundle Pack service

4. Configure the bundle size and bundle members that are unique users. You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the *Resources tree*.

NOTE: *Flat rate* only is available for the *Bundle member* resource.

Resources	Status	Billing rule	Quantity rule
Bundle grouping Bundle member	by Resource Included	Default	Default

Create scope

II. Create a pay-as-you go service that will contain the bundle price:

1. Create a service that will store prices for all bundle units in the EUR currency. For your convenience it is recommended to list the pack names the prices for which are stored in this service, in the *Description* field.



Finance

Add Service



*Name

Bundle_price

*Type

Pay-as-you-go

*Currency

EUR

Description

SMS and WhatsApp messages

Cancel

Save

Add a pay-as-you-go service

2. Configure the pack price, the price for each message that exceeds the pack and price of the events in the selected destinations, in this case SMS and WhatsApp. You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the Resources tree.



Finance

Resources	Price type	Price, EUR	Billing rule	
Service purchase	by Resource			
Bundle pack	by Pack		Default	
Bundle_2_pack - 100	Flat rate	20.00000	Default	
Bundle grouping	by Resource			
Bundle member	Flat rate	1.00000	Default	
WhatsApp messaging	by Resource			
WhatsApp message	by Country		Delivered	
Afghanistan	Flat rate	0.10000	Submitted	
Angola	Flat rate	0.20000	Submitted	
Others	Flat rate	0.50000	Submitted	
WhatsApp conversation	Flat rate	0.20000	Default	
SMS messaging	by Resource			
SMS message	Flat rate	0.30000	Submitted	

Configuring the resources tree

III. Associate the packs from step 1 with the relevant agreement:

1. Go to [Account management\Enabled packs](#). Click *Add enabled pack*.
2. Select the pack in the *Service (pack)* field.
3. In the *Agreement* field, select the agreement with which the pack must be associated.
4. *Effective from*: specify the effective date and timezone for the association. The *Effective from* date is the date of the service purchase.
5. *Effective till*: specify the expiry date and timezone.
6. Select *Do not show to client* to hide the service from the client's interface.
7. Click *Save* to save the changes.

Finance

View Enabled services ID 1378

Service

Bundle_price

Agreement

VA_selreg_2b - Bundle_22, EUR

*Effective from ⓘ

13.03.2025, 15:29:35



Timezone

Etc/UTC

Effective till ⓘ

∞ (indefinitely)



Timezone

Etc/UTC

☐ Do not show to client

Cancel

Edit

Enabling pay-as-you-go service

8. Go to [Account management\Enabled bundle initiators](#)⁴¹. Click *Add enabled bundle initiator*.
9. Select the pack in the *Service (pack)* field.
10. In the *Agreement* field, select the agreement with which the pack must be associated.
11. *Effective from*: specify the effective date and timezone for the association. The *Effective from* date is the date of the service purchase.
12. *Effective till*: specify the expiry date and timezone.
13. Select *Do not show to client* to hide the service from the client's interface.
14. Click *Save* to save the changes.



Finance

View Enabled bundle initiator ID 1379 ×

Service (pack)

Bundle_1

Agreement

VA_selreg_2b - Bundle_22, EUR

*Effective from ⓘ

13.03.2025, 00:00:00 📅

Effective till ⓘ

∞ (indefinitely) 📅

☐ Do not show to client

Cancel

Edit

Enabling bundle initiator

15. Go to [Account management\Enabled bundle packs](#)⁴³. Click *Add enabled bundle pack*.
16. Select the pack in the *Service (pack)* field.
17. In the *Agreement* field, select the agreement with which the pack must be associated.
18. Click *Save* to save the changes.

View Enabled bundle pack ID 1380 ×

Service (pack)

Bundle_2_pack

Agreement

VA_selreg_2b - Bundle_22, EUR

☐ Auto extend

Cancel

Edit

Enabling bundle pack

NOTE: The balance will be updated (the bundle price will be charged) and further billing will be performed accordingly.

Finance

7.4 Additional fees

The *Finance\Additional fees* interface serves to view and create additional fees that may apply. Once an additional fee is added it will become a billable event and will be included in an invoice as a charge.

Additional fees											
ID	Time	Transaction ID	Company	Agreement	User	Balance ID	Sub balance ID	Rule ID	Issued	Additional service	Attributes
1	11.11.2024 11:05	01931a41-3a93-7...	Telecom Monsters	NC-12345			0		true		{}

Additional fees

1. Click to customize the display of columns.
2. Click *New additional fee* to add a new fee.

Additional fee

*Company

Hornes and Hooves Ltd

*Agreement

1234, EUR

Description

Training session

*Fee type

Fixed price

*Pre rated cost

500

Cancel

Save

Add Additional fee (Fixed price)

To create a new additional fee, click *New additional fee* and complete the fields as explained below.

1. *Company*: select the name of the company.
2. *Agreement*: select the agreement with which the service must be associated.
3. *Description*: add a description.
4. *Fee type*: Select one of the following values:
 - a. *Fixed price*: a set amount designated for a service.
 - b. *By tariff*: billing will apply by rate for an available service.
5. *Pre rated cost*: the amount designated for the service.

NOTE: *Pre rated cost* applies in case *Fixed price* is selected for the *Fee type*. For the *By tariff* type see information below.

6. Click *Save* to save the changes or *Cancel* to discard the settings.

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The screenshot shows a modal window titled "Additional fee" with a close button (X) in the top right corner. The form contains the following fields and elements:

- *Company:** A dropdown menu with "Hornes and Hooves Ltd" selected.
- *Agreement:** A dropdown menu with "1234, EUR" selected.
- Description:** A text input field containing "Training".
- *Fee type:** A dropdown menu with "By tariff" selected. A red callout box with the number "1" points to this field.
- Additional service:** A dropdown menu with "Select..." selected. A red callout box with the number "2" points to this field.
- *Volume:** A text input field containing "1". A red callout box with the number "3" points to this field.
- Rate:** A green checkmark followed by "5 EUR". A red callout box with the number "4" points to this text.
- Effective date:** "Effective: 2024-09-01 00:00:00 +0000 UTC - ∞".
- Buttons:** "Cancel" and "Save" buttons at the bottom right. A red callout box with the number "5" points to the "Save" button.

Add Additional fee (By tariff)

1. *Fee type:* By tariff.

NOTE: To apply the *By tariff* type you should enable *Additional services* for your Company in the [Enabled services](#) interface otherwise the System will return an error.

2. *Additional service:* service name (optional).
3. *Volume:* the quantity.
4. Once *Agreement* is selected the rate will appear below.
5. Click *Save* to save the changes or *Cancel* to discard the settings.

7.5 EDR Rerate

The *Finance\EDR Rerate* interface serves to update the existing EDRs after changes have been made to any entities that affect the EDRs already generated.

NOTE: EDR (Event Detail Record) is a record capturing the details of an attempt to send SMS.

NOTE: Only manual running of EDR rerating is supported, automatic rerating is not available.

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EDR Rerate								
ID	Company	Status	Time from	Time till	Scheduled for	Error message	Updated	Updated by
196	System owner	SCHEDULED	26.11.2024 00:00	30.11.2024 00:00	04.02.2025 00:00			backoffice - manager
195	System owner	COMPLETE	13.12.2024 00:00	14.12.2024 00:00	13.12.2024 07:20		13.12.2024 07:20	backoffice - manager
194	System owner	COMPLETE	12.12.2024 00:00	13.12.2024 00:00	12.12.2024 18:11		12.12.2024 18:11	backoffice - manager
193	System owner	COMPLETE	03.12.2024 00:00	04.12.2024 00:00	10.12.2024 14:51		10.12.2024 14:51	backoffice - manager
192	System owner	COMPLETE	03.12.2024 00:00	04.12.2024 00:00	09.12.2024 18:50		09.12.2024 18:50	backoffice - manager
191	System owner	COMPLETE	03.12.2024 00:00	04.12.2024 00:00	09.12.2024 18:42		09.12.2024 18:42	backoffice - manager
190	System owner	COMPLETE	25.11.2024 20:12	25.11.2024 20:35	09.12.2024 17:44		09.12.2024 17:50	VA_dev2
189	System owner	COMPLETE	04.12.2024 00:00	05.12.2024 00:00	09.12.2024 15:53		09.12.2024 15:53	backoffice - manager
188	System owner	COMPLETE	25.11.2024 20:12	25.11.2024 20:35	06.12.2024 19:05		06.12.2024 19:09	backoffice - manager
187	System owner	COMPLETE	25.11.2024 20:12	25.11.2024 20:35	06.12.2024 18:56		06.12.2024 19:03	backoffice - manager
186	System owner	COMPLETE	25.11.2024 20:12	22.11.2024 20:35	06.12.2024 18:55		06.12.2024 18:55	backoffice - manager
185	System owner	COMPLETE	25.11.2024 23:13	22.11.2024 23:35	06.12.2024 18:53		06.12.2024 18:53	backoffice - manager
184	System owner	COMPLETE	05.12.2024 00:00	05.12.2024 01:00	07.12.2024 00:00		07.12.2024 00:00	backoffice - manager

EDR rerate

- The table contains the following information:
 - ID*;
 - Company*;
 - Status*: Draft, Scheduled, Running, Complete, Canceled, Completed;
 - Time from*: the date and time when the EDR rerating period begins;
 - Time till*: the date and time when the EDR rerating period ends;
 - Scheduled for*: the date when a task is scheduled to begin;
 - Error message*;
 - Updated*: the date of the update;
 - Updated by*.
- Click to customize the display of columns.
- Click *Add rerate task* to add a new task.

Click on the entry in the table to view the EDR rerate details.

Finance

Task ID: 191

EDR details

2	2
Estimated	Processed
2	0
Updated	Failed

Session details

2	2
Processed	Updated
0	0
Failed	

Reseller CDR details

0	0
Processed	Created
0	0
Updated	Failed

Status

Complete

Effective period

03.12.2024 00:00:00 - 04.12.2024 00:00:00

Scheduled for

09.12.2024 18:42:51

Updated

09.12.2024 18:42:51

Updated by

backoffice-manager

Filter

Company: ak4charge

Agreement: ak4charge

Channel: WhatsApp

EDR rerate details

The view window displays the following information:

1. EDR details:

- *Estimate*: the original estimate of the number of EDRs to be rerated.
- *Processed*: the number of processed EDRs.
- *Updated*: the number of processed EDRs that were rerated successfully.
- *Failed*: the number of EDRs processed with an error.

2. Session details:

- *Processed*: the number of processed sessions (WhatsApp sessions only).
- *Updated*: the number of processed sessions that were rerated successfully.
- *Failed*: the number of sessions processed with an error.

3. Reseller CDR details:

- *Processed*: the number of processed Reseller CDRs.
- *Created*: the number of created Reseller CDRs.
- *Updated*: the number of rerated Reseller CDRs.
- *Failed*: the number of Reseller CDRs processed with an error in ocs.

To create a new EDR rerate task, click *Add EDR rerate task* and complete the fields as explained below.

Finance

Add EDR rerate task



1

*Time from

01.09.2024 00:00:00

*Time till

01.12.2024 00:00:00

2

*Company

VA_RESELLER_1 X Select...

3

Agreement

Select...

4

Channel

WHATSAPP X Select...

5

☒ Recalculate session billing

6

Scheduled for

Left blank for instant startup

7

Estimated count of entities: 0

Cancel

Save

Add EDR rerate task

1. Select the EDR rerating period.
2. Select the company or companies.
3. Select the appropriate agreement.
4. Select the channel(s).
5. Select the checkbox to recalculate session billing.
6. Enter the date or leave blank to start the task instantly.
7. Click *Save* to save the changes or *Cancel* to discard the settings.



Users

8 Users

The *Users* interface serves to send invitations to future System users, as well as to manage users after their successful registration. To create a user in the System, the admin sends them an email invitation. The email template is configured in the [Notification and Mail Settings/Templates](#)^[212] interface. The email contains a link that allows the future user to access the [sign up form](#)^[173]. The interface consists of three tabs: [BackOffice](#)^[151], [Client portal](#)^[159] and [Roles](#)^[167].

8.1 BackOffice

The *BackOffice* tab serves to configure BackOffice (reseller company) users. It contains a table of BackOffice users and relevant controls.

The table contains records of reseller company users. The first entries in the table are invited users: users who have received an invitation but have not yet registered in the System. These entries are sorted by email. Following the invitations are users who have already successfully registered in the System and completed their initial authorization; these entries are also sorted by email.

ID	User	Company	Status	Role	Last active	Actions
3241	Guest asd.l@asd.z	AT_FIXT_test_company	Expired	ADMIN	13.02.2026	...
2423	Guest at_10241336@at.at	AT_FIXT_test_company	Invited	ADMIN	17.02.2026	...
2397	Guest at_10383335@at.at	AT_FIXT_test_company	Expired	ADMIN	13.02.2026	Edit Resend Revoke Delete
2396	Guest at_1335517@at.at	AT_FIXT_test_company	Expired	ADMIN	13.02.2026	...
2393	Guest at_13777311@at.at	AT_FIXT_test_company	Expired	ADMIN	13.02.2026	...
2392	Andy Candy director@cybershop.com	Cyber Shop	Active	CLIENT MANAGER	12.09.2025	...

BackOffice

The table contains the following information and controls:

1. *ID*: user's identification number in the System.
2. *User*: user information.

NOTE: If a user is invited but has not yet registered, the word *Guest* will appear in the name field.

3. *Company*: company the user belongs to.
4. *Status*: user's status. Possible values:
 - *Invited*: user has been invited to the System, but registration is not complete;
 - *Expired*: invitation has expired;
 - *Revoked*: invitation was revoked before registration was completed;

Users

- *Active*: user is active, registration has been completed;
 - *Inactive*: user is inactive, registration has been completed.
5. *Role*: roles assigned to the user.
 6. *Last active*: the date when a user was last active.
 7. *Actions*: additional actions that can be performed on the entry.
 - *Edit*: click to open the *Edit user* panel with information about the user.
 - *Resend*: click to resend the invitation. When resending, the token is regenerated and the invitation expiration date is also updated.
 - *Revoke*: click to cancel the invitation. When revoked, the token is invalidated, and registration using the link in the email URL becomes unavailable.
 - *Delete*: click to delete the user.
 8. Click to apply ascending or descending order (applicable to all columns except *Role* and *Actions*).
 9. Click to filter the records in the table. Click  to clear filters.
 10. Click *Invite* to invite a new user.

Users

×

Invite user

*Email

aaaa@abc.com

1

*Company

RVV

2

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

3

*Role

IMPORTANT ROLE X

4

5

Permissions

The areas of system this user can view or manage

Settings (11 of 11) ▾

Account management (13 of 13) ▾

Finance (5 of 5) ▾

MCCMNC (1 of 1) ▾

Portals (1 of 1) ▾

Export (1 of 1) ▾

Security

☒ Two-factor authentication

Disabled

6

8

7

Cancel

Save

Invite user

Configure the following fields in the *Invite user* panel:

1. *Email*: provide the user's email that the invitation will be sent to.
2. *Company*: select the company that the user is created for.
3. *No restrictions*: select for the user to have the *Admin* role and have unrestricted access to all objects and actions.

NOTE: If a reseller company has been selected in the *Company* control on the *General* tab, the selected checkbox assigns the BackOffice *Admin* role to the user. If a client company has been selected in the *Company* control on the *General* tab, the selected checkbox assigns the Client portal *Admin* role to the user.

4. *Role*: select a role from the drop-down list of the roles available for the company.
5. *Permissions*: permissions assigned to a user with their role. Click ▾ to expand the list of permissions associated with the role and see their status.

Users

- *None*: permission is not granted;
- *View*: permission to view is granted;
- *Manage*: full access is granted.

NOTE: Permissions are not editable and are updated together with the *Role*.

NOTE: If a reseller company was selected in the *Company* control, the permissions section displays BackOffice permissions; if the company is a client, permissions valid for the Client portal are displayed.

6. *Two-factor authentication*: select to enable two-factor authentication for the user.

NOTE: The toggle may not be available in case mandatory 2FA has been enabled for all users in the company.

7. Click *Save* to save the changes and send invitation.

8. Click *Cancel* to discard the settings.

Double click on the record in the table to view user. The *View user* panel consists of the header and two tabs: *General* and *Role*.

View User

×

11

111 111

Account ID: 121

Inactive: 06.05.2021

General

Role

E-mail

111@wp.pl

Login

aaaa

Phone number

123123

Company

System owner

☐ Is Active

Security

Password

Reset password

Two-factor authentication

Disabled

3

Delete

2

Cancel

1

Edit

View User (General tab)

Users

View User



11

111 111

Account ID: 121

Inactive: 06.05.2021

General Role☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

CLIENT MANAGER

Permissions

The areas of system this user can view or manage

Settings	(3 of 12)	▼
Finance	(1 of 6)	▼
Account management	(13 of 13)	▼
MCCMNC	(1 of 1)	▼
Users	(0 of 3)	▼
Reports	(0 of 1)	▼
Audit	(0 of 1)	▼
Pre-moderation	(1 of 1)	▼
Portals	(1 of 1)	▼
Export	(1 of 1)	▼

Notifications

Select the notifications this user can receive.

☒ Personal Information	Get notified about profile changes, account updates, and security activity	▼
☒ Moderation	Get notified about moderated entities and their statuses	▼
☐ Finance	Get notified about transactions and balances	▼
☐ Technical	Get notified about system errors, incidents	▼
☐ Reports & Export Results	Get notified about system errors, report availability, export status	▼
☐ Payments	Get notified about payments' status	▼

3

Delete

2

Cancel

1

Edit



Users

View User (Role tab)

1. Click *Edit* to start editing a user.
2. Click *Cancel* to discard the settings.
3. Click *Delete* to delete the user.

To edit a BackOffice user select *Edit* in the *Actions* menu or click *Edit* in the *View user* form.

The screenshot shows the 'Edit User' form for user '111 111'. At the top, there's a header 'Edit User' with a close button 'X'. Below it, the user's profile is shown with an orange square containing '11', the name '111 111', and account details: 'Account ID: 121' and 'Inactive: 06.05.2021'. There are two tabs: 'General' (selected) and 'Role'. Callout 1 points to the 'General' tab. Below the tabs are input fields for 'E-mail' (111@wp.pl), 'Login' (aaaa), 'Phone number' (123123), and 'Company' (System owner). Below these is a checkbox 'Is Active'. A 'Security' section contains a 'Password' field with a 'Reset password' link (callout 2) and a 'Two-factor authentication' toggle set to 'Disabled' (callout 3). At the bottom, there are three buttons: 'Delete' (callout 5), 'Cancel' (callout 4), and 'Save'.

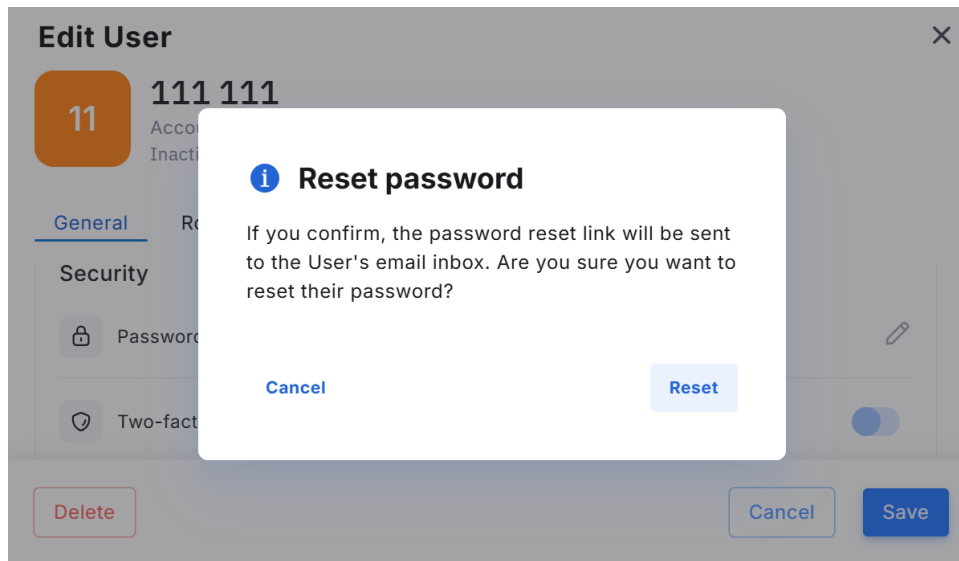
Edit User (General tab)

1. Edit user information as appropriate.

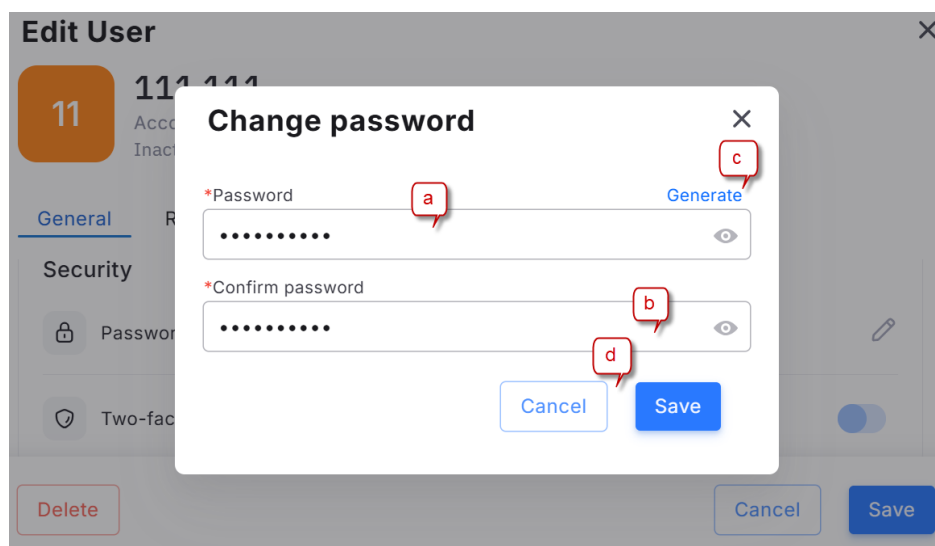
NOTE: The *E-mail*, *Login* and *Phone number* controls are not editable. This data is edited in the [Account settings](#) ¹⁴ interface.

2. *Reset password*: click to reset the user's password. In the panel that appears select *Reset* to send the link to the user's email or *Cancel* to discard the action.

Users

**Reset password**

3. *Set new password*: click  to reset the user's password manually in the panel that appears.

**Change password**

- a. *Password*: type in the new password.
 - b. *Confirm password*: retype the new password.
 - c. *Generate*: the button is used to generate a strong password according to the accepted password policy. The generated password is displayed in the *Password* field.
 - d. Click *Save* to save the new password or *Cancel* to discard the settings.
4. Click *Save* to save the record or *Cancel* to discard the settings.
5. Click *Delete* to delete the user.

Users

11

111 111

Account ID: 121 ⓘ

Inactive: 06.05.2021

1

General

Role

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

CLIENT MANAGER X

Permissions

The areas of system this user can view or manage

Settings	(3 of 12)	▼
Finance	(1 of 6)	▼
Account management	(13 of 13)	▼
MCCMNC	(1 of 1)	▼
Users	(0 of 3)	▼
Reports	(0 of 1)	▼
Audit	(0 of 1)	▼
Pre-moderation	(1 of 1)	▼
Portals	(1 of 1)	▼
Export	(1 of 1)	▼

Notifications

Select the notifications this user can receive.

☒ Personal Information	Get notified about profile changes, account updates, and security activity	▼
☒ Moderation	Get notified about moderated entities and their statuses	▼
☐ Finance		▼

2

3

Delete

Cancel

Save

Edit User (Role tab)

1. Edit user role as appropriate.
2. Click *Save* to save the record or *Cancel* to discard the settings.
3. Click *Delete* to delete the user.

NOTE: Permissions are not editable and are updated together with the *Role*.

NOTE: Notifications are not editable and are edited in the [Roles](#) ¹⁶⁷ tab.

Users

8.2 Client portal

The *Client portal* tab serves to invite and configure Client Portal users (client company users). It contains a table of Client Portal users and relevant controls. It is organized similar to the *BackOffice* tab.

Users

Invite 10

BackOffice 175 1 Client portal 400 2 Roles 39 3

ID 4	User 8	Company 5	Status 9	Role 6	Last active 7	
2436	Guest asd@as.a	DB_comp	Expired	ADMIN	28.01.2026	...
3104	070newapi2 070newapi 070newapi@qq.qq	System owner Own	Active	BROADCAST MANAGER	11.02.2026	...
2352	Guest rm.service006@gmail.com	Mapa	Expired		14.01.2026	...
2354	Guest rms.service006@gmail.com	Mapa	Expired		14.01.2026	...
2356	Guest rmse.rvice006@gmail.com	Mapa	Expired	BROADCAST MANAGER	14.01.2026	...
2357	Guest rmser.vice006@gmail.com	Mapa	Expired	BROADCAST MANAGER	14.01.2026	...

Actions: Edit, Resend, Delete

Client portal tab

The table contains the following information and controls:

1. *ID*: user's identification number in the System.
2. *User*: user information. Contains the following elements:

NOTE: If a user is invited but has not yet registered, the word *Guest* will appear in the name field.

3. *Company*: company the user belongs to.
4. *Status*: user's status. Possible values:
 - *Invited*: user has been invited to the System, but registration is not complete;
 - *Expired*: invitation has expired;
 - *Revoked*: invitation was revoked before registration was completed.
 - *Active*: user is active, registration has been completed;
 - *Inactive*: user is inactive, registration has been completed.
5. *Role*: roles assigned to the user.
6. *Last active*: the date when a user was last active.
7. *Actions*: additional actions that can be performed on the entry.
 - *Edit*: click to open the *Edit user* panel with information about the user.
 - *Resend*: click to resend the invitation. When resending, the token is regenerated and the invitation expiration date is also updated.
 - *Revoke*: click to cancel the invitation. When revoked, the token is invalidated, and registration via the link in the email URL becomes unavailable.

Users

- *Delete*: click to delete the user.
- Click to apply ascending or descending order (applicable to all columns except *Role* and *Actions*).
 - Click to filter the records in the table. Click  to clear filters.
 - Click *Invite* to invite a new user.

Invite user

*Email

*Company

System owner

*Departments

ADMIN x Select department

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER x

Permissions

The areas of system this user can view or manage

Export (0 of 1)		
Dashboard (1 of 1)		
Name	None	Manage
Dashboard	☐	☒
Users (0 of 2)		
Audit (0 of 1)		

Security

Two-factor authentication

Disabled

Cancel

Save

Invite user

Configure the following fields in the *Invite user* panel:

- Email*: provide the user's email that the invitation will be sent to.
- Company*: select the company that the user is created for.

Users

3. *Departments*: company department(s) that a user is assigned to. Multiple selection of departments is available. Start typing the name of the department in the input field then press **+ Add** to add a new department. Click  opposite a department in the drop-down list to delete the department.
4. *No restrictions*: select for the user to have the *Admin* role and have unrestricted access to all objects and actions.

NOTE: If a reseller company has been selected in the *Company* control on the *General* tab, the selected checkbox assigns the *BackOffice Admin* role to the user. If a client company has been selected in the *Company* control on the *General* tab, the selected checkbox assigns the *Client portal Admin* role to the user.

5. *Role*: select a role from the drop-down list of the roles available for the company. If *Company* is not specified, the control is not active.

NOTE: The control is not available if *No restrictions* checkbox is selected.

6. *Permissions*: permissions assigned to a user with their role. Click  to expand the list of permissions associated with the role and see their status.
 - *None*: permission is not granted;
 - *View*: permission to view is granted;
 - *Manage*: full access is granted.

NOTE: Permissions are not editable and are updated together with the *Role*.

NOTE: If a reseller company was selected in the *Company* control, the permissions section displays *BackOffice* permissions; if the company is a client, permissions for the *Client portal* are displayed.

7. *Two-factor authentication*: select to enable two-factor authentication for the user.

NOTE: The toggle may not be available in case mandatory 2FA has been enabled for all users in the company.

8. Click *Save* to save the changes and send invitation.
9. Click *Cancel* to discard the settings.

Double click on the record in the table to view user.

Users

View User



11

123 123
Account ID: 1430
Active: 28.01.2025

General

Role

E-mail

123123@gmail.com

Login

bdtest1

Phone number

Company

System owner

Departments

TEST FIRST LINE SUPPORT

☒ Is Active

Security



Password

Reset password



Two-factor authentication

Disabled



Delete

Cancel

Edit

View User (General tab)



Users

View User



11

123 123

Account ID: 1430

Active: 28.01.2025

General

Role



No restrictions

Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER



Permissions

The areas of system this user can view or manage

Export	(0 of 1)	▼
Dashboard	(1 of 1)	▼
API Accesses	(0 of 1)	▼
Statistics	(2 of 4)	▼
2FA SMS	(0 of 1)	▼
Broadcast	(1 of 1)	▼
Contacts	(3 of 3)	▼
Conversations	(2 of 2)	▼
Finance	(1 of 3)	▼
Assets	(5 of 5)	▼
Users	(0 of 2)	▼
Audit	(0 of 1)	▼
2FA voice	(0 of 1)	▼
Balance	(1 of 1)	▼

Notifications

Select the notifications this user can receive.

☒ Personal Information	Get notified about profile changes, account updates, and security activity	▼
☒ Technical	Get notified about system errors, incidents	▼
☐ Finance	Get notified about transactions and balances	▼
☐ Moderation	Get notified about moderated entities and their statuses	▼
☐ Reports & Export Results	Get notified about system errors, report availability, export status	▼
☐ Payments	Get notified about payments' status	▼

3

Delete

2

Cancel

1

Edit



Users

View User (Role tab)

1. Click *Edit* to start editing a user.
2. Click *Cancel* to discard the settings.
3. Click *Delete* to delete the user.

To edit a Client portal user select *Edit* in the *Actions* menu or click *Edit* in the *View user* form.

The screenshot shows the 'Edit User' form for user 11 (123 123). The form has two tabs: 'General' and 'Role'. The 'General' tab is active. The form contains the following fields and controls:

- General Tab:**
 - E-mail:** 123123@gmail.com (Callout 1 points to the field).
 - Login:** bdtest1
 - Phone number:** (Empty field)
 - Company:** System owner
 - *Departments:** TEST X FIRST LINE SUPPORT X Select... (Callout 1 points to the field).
 - Is Active:** ☒ (Callout 1 points to the checkbox).
- Security Tab:**
 - Password:** (Callout 2 points to the field). A 'Reset password' link is visible (Callout 3 points to the link).
 - Two-factor authentication:** Disabled (Callout 4 points to the toggle switch).
- Buttons:**
 - Delete:** (Callout 5 points to the button).
 - Cancel:** (Callout 4 points to the button).
 - Save:** (Callout 4 points to the button).

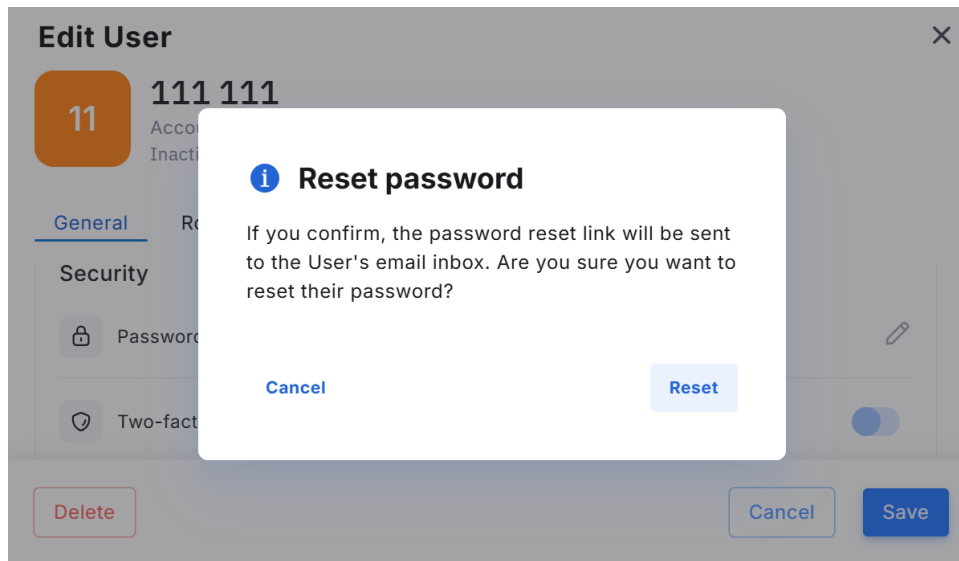
Edit User (General tab)

1. Edit user information as appropriate.

NOTE: The *E-mail*, *Login* and *Phone number* controls are not editable. This data is edited in the Client portal *My account\Account settings* interface.

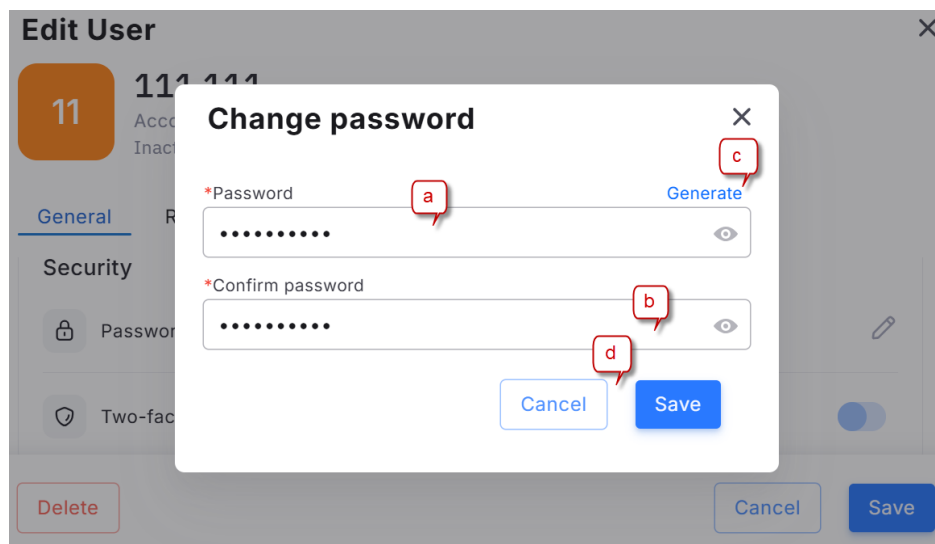
2. *Reset password:* click to reset the user's password. In the panel that appears select *Reset* to send the link to the user's email or *Cancel* to discard the action.

Users



Reset password

1. *Set new password*: click  to reset the password manually in the panel that appears.



Change password

- a. *Password*: type in the new password.
 - b. *Confirm password*: retype the new password.
 - c. *Generate*: the button is used to generate a strong password according to the accepted password policy. The generated password is displayed in the *Password* field.
 - d. Click *Save* to save the new password or *Cancel* to discard the settings.
3. Click *Save* to save the record or *Cancel* to discard the settings.
 4. Click *Delete* to delete the user.

Users

Edit User

11

123 123

Account ID: 1430
Active: 28.01.2025

General

Role

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role
BROADCAST MANAGER X

Permissions

The areas of system this user can view or manage

Export	(0 of 1)	▼
Dashboard	(1 of 1)	▼
API Accesses	(0 of 1)	▼
Statistics	(2 of 4)	▼
Broadcast	(1 of 1)	▼
Contacts	(3 of 3)	▼
Conversations	(2 of 2)	▼
Finance	(1 of 3)	▼
Assets	(5 of 5)	▼
Users	(0 of 2)	▼
Audit	(0 of 1)	▼
2FA voice	(0 of 1)	▼
Balance	(1 of 1)	▼

Notifications

Select the notifications this user can receive.

☒ Personal Information
Get notified about profile changes, account updates, and security activity

☒ Technical
Get notified about system errors, incidents

☐ Finance

Delete

Cancel

Save

Edit User (Role tab)

1. Edit user role as appropriate.
2. Click *Save* to save the record or *Cancel* to discard the settings.
3. Click *Delete* to delete the user.

Users

NOTE: Permissions are not editable and are updated together with the *Role*.

NOTE: Notifications are not editable and are edited in the [Roles](#) ¹⁶⁷ tab.

8.3 Roles

The *Roles* tab serves to view and configure user roles, permissions and notifications that the user can receive. The System implements a role model, which implies that each user is assigned a role or a set of roles for which certain permissions are assigned. The System allows to use System roles marked with the *System* label, as well as to create new custom roles for BackOffice and Client portal users.

Name	Group	Company	Actions
Important role	BackOffice		...
Broadcast manager	BackOffice		Edit, Delete
Admin • System	BackOffice		
Finance manager • System	BackOffice		...
NOC engineer • System	BackOffice		...
Rate manager • System	BackOffice		View

Roles tab

The table contains the following information and controls:

1. *Name*: role name. Predefined roles are marked with the *System* label.
2. *Group*: group that the role belongs to (*Client portal* or *BackOffice*).
3. *Company*: companies that can assign this role to their users. System roles in this column display a single value: *All* (the System role is available to all companies).
4. *Actions*: additional actions that can be performed on the entry.
 - *View*: click to open *View role* form.
 - *Edit*: click to open *Edit role* form.
 - *Delete*: click to delete a role.

NOTE: In case a role is assigned to one or more users it can not be deleted.

5. Click to apply ascending or descending order (applicable to all columns except *Actions*).

6. Click to filter the records in the table. Click  to clear filters.

7. Click *New* to create a new role.

Users

New role



*Name

Director

8 / 40

Description

Always on the light side of the Force

*Group

BackOffice

Template

Important role

Company

SYSTEM OWNER x Select...

*Permissions

Select the areas of system this user can view or manage

Settings (11 of 12)

Finance (5 of 6)

Name	View	None	Manage
Payments	☐	☐	☒
Invoices and charges	☐	☐	☒
Services	☐	☐	☒
Additional fees		☐	☒
EDR Rerate	☐	☐	☒

Account management (13 of 13)

MCCMNC (1 of 1)

Users (0 of 3)

Reports (1 of 1)

Audit (1 of 1)

Pre-moderation (1 of 1)

Portals (1 of 1)

Export (1 of 1)

New Role (1)

1. *Name*: type in the name of the role.
2. *Description*: add role description.
3. *Group*: group the role belongs to. The following options are available:



Users

- *Client portal*: roles for Client portal users.
 - *BackOffice*: roles for BackOffice users.
4. *Template*: template role to be used when creating a new role. When you select a role for the template, permissions will be automatically filled in.

The following template roles are available for Client portal users:

- *Admin*: user with full access to all interfaces and System functions.
- *Broadcast manager*: a user who manages broadcasts.
- *Finance manager*: a user who manages financial transactions.
- *NOC engineer*: a user who monitors, maintains and supports the System.

The following template System roles are available for BackOffice users:

- *Admin*: user with full access to all interfaces and System functions.
- *Client manager*: a user who manages customers, agreements and other client information.
- *Finance manager*: a user who manages financial transactions.
- *NOC engineer*: a user who monitors, maintains and supports the System.
- *Rate manager*: user who manages services and rate plans.

NOTE: After a custom role is created it will appear in the drop-down list of template roles.

5. *Company*: company that the role is created for. Multiple choice of companies is available.
6. *Permissions*: section with the permissions that will be assigned to the user with this role. Click  to expand the section and select the permissions.

Notifications 

Select the notifications this user can receive.

☐ **Finance**
Get notified about transactions and balances

☐ **Technical**
Get notified about system errors, incidents

☐ **Moderation**
Get notified about moderated entities and their statuses

☒ **Personal Information**
Get notified about profile changes, account updates, and security activity

☐ **Reports & Export Results**
Get notified about system errors, report availability, export status

☐ **Payments**
Get notified about payments' status



New Role (2)

Users

7. *Notifications*: System alerts that a user can receive. Click  to expand the section and display the notification group. The following groups are available:
- a. *Finance*: notifications about transactions and balances.
 - b. *Technical*: notifications about system errors and incidents.
 - c. *Moderation*: notifications about moderated entities and their statuses.
 - d. *Personal information*: notifications about profile changes, account updates and security activity.
 - e. *Reports and Export results*: notifications about report availability and export results.
 - f. *Payments*: notifications about payments' status.

NOTE: *Personal information* notifications are always active and cannot be assigned to or disabled for any role.

8. Click *Save* to save the changes or *Cancel* to discard the settings.

Double click on the record in the table to view role.

Users

View role



Name

Invoice

7 / 40

Description

Group

Client portal

Template

Company

Permissions

The areas of system this user can view or manage

Export	(0 of 1)	▼
Dashboard	(0 of 1)	▼
API Accesses	(0 of 1)	▼
Statistics	(0 of 4)	▼
2FA SMS	(0 of 1)	▼
Broadcast	(0 of 1)	▼
Contacts	(0 of 3)	▼
Conversations	(0 of 2)	▼
Finance	(0 of 3)	▼
Assets	(0 of 5)	▼
Users	(0 of 2)	▼
Audit	(0 of 1)	▼
2FA voice	(0 of 1)	▼
Balance	(0 of 1)	▼

Notifications

Select the notifications this user can receive.

☒	Personal Information	▼
Get notified about profile changes, account updates, and security activity		
2	Delete	1
		Cancel Edit

View role

1. Click *Edit* to start editing the role or *Cancel* to close the form.
2. Click *Delete* to delete the role.



Users

Edit role



*Name

Invoice

7 / 40

Description

A very important role

*Group

Client portal

Template

Select...

Company

AB FOR RESELLING X Select...



*Permissions

Select the areas of system this user can view or manage

Export (0 of 1)



Dashboard (0 of 1)



API Accesses (0 of 1)



Statistics (0 of 4)



2FA SMS (0 of 1)



Broadcast (0 of 1)



Contacts (0 of 3)



Conversations (0 of 2)



Finance (0 of 3)



Assets (0 of 5)



Users (0 of 2)



Audit (0 of 1)



2FA voice (0 of 1)



Balance (0 of 1)



Notifications

Select the notifications this user can receive.



Personal Information

Get notified about profile changes, account updates, and security activity



Delete

Cancel

Save

Edit role



Users

1. Edit the role and permissions associated with it as appropriate.
2. Click *Save* to save the record or *Cancel* to discard the settings.
3. Click *Delete* to delete the role.

NOTE: System roles are not editable.

8.4 Sign up form

After a user clicks an invitation link from the email, validation is initiated. If validation is successful, the sign up form appears.

The image shows a 'Sign up' form with the following fields and callouts:

- 1** First name: Input field containing 'John'.
- 2** Last name: Input field containing 'Johns', with a character count '0 / 60'.
- 3** Phone number: Input field with a masked number, with a character count '0 / 60'.
- 4** Login: Input field containing 'backoffice', with a character count '0 / 15'.
- 5** New password: Password input field with a character count '0 / 30' and a toggle icon.
- 6** Generate: Button next to the new password field.
- 7** Confirm password: Password input field with a toggle icon.
- 8** Sign up: Large blue button at the bottom.

Sign up form

In the sign up form that appears the user shall provide the following information:

1. *First name*: user's name.
2. *Last name*: user's family name.
3. *Phone number*: user's phone number.

Users

4. *Login*: user's login. Login can only contain Latin letters, numbers, dots, and underscores.
5. *Password*: user's password.
6. *Generate*: the button is used to generate a strong password according to the accepted password policy. The generated password is displayed in the *Password* and *Confirm password* controls.
7. *Confirm password*: password confirmation.
8. *Sign up*: completes the registration process.

In case two-factor authentication is enabled for a user, the sign up form is closed and a phone number confirmation panel (see figure below) is displayed. If two-factor authentication is not enabled, the user is redirected to the [Account settings](#)¹⁴ interface.

Enter the code from the SMS to confirm

Phone number confirmation panel

1. Field to enter the SMS verification code;
2. By pressing *Continue* the user confirms their phone number. If the code is correct the user is redirected to the [Account settings](#)¹⁴ interface.

NOTE: After 3 failed attempts to enter the SMS verification code the user is given a 10-minute timeout.

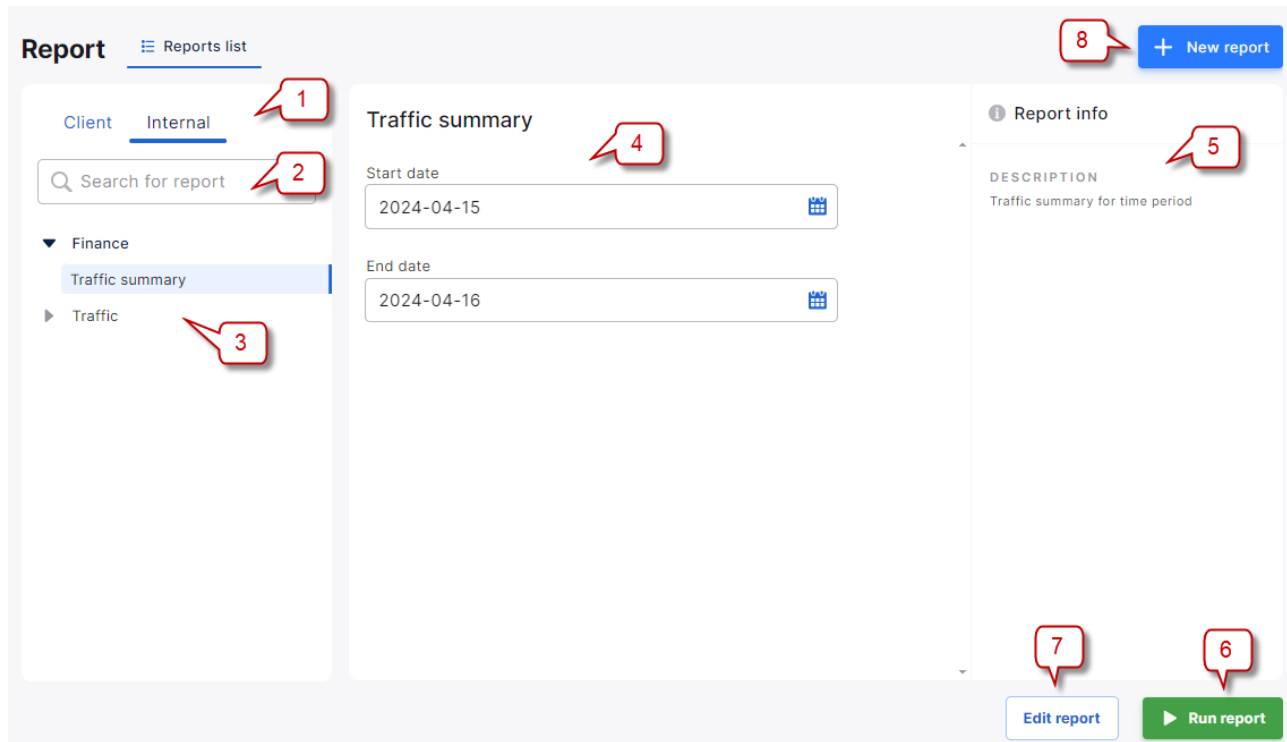
3. By pressing *Cancel* the user discards the settings and closes the panel.

Reports and Analytics

9 Reports and Analytics

The *Reports and Analytics* interface enables creating and editing custom report templates and then executing these reports based on user-defined parameters. The System comes with no preconfigured templates as they are created for each customer individually, in accordance with its specific requirements and needs.

The interface contains the *Report* page that displays the following elements and controls.



Reports page

1. Click *Internal* to view reports available in the BackOffice interface only. Click *Client* to view reports available both in the BackOffice and Client portal interfaces.
2. Use the search box to search for a report.
3. View the available report categories and reports. Click ► to unfold the list of reports available in the category. Select the report that you wish to run.
4. Set the parameters of the selected report.
5. *Report info*: view the report description.
6. Click *Run report* to execute the report with the parameters specified in (4).
7. Click *Edit report* to modify the report template or delete it.
8. Click *New report* to create a new report template.

NOTE: To create or edit a report, the user must be able to understand and write PostgreSQL queries.

Reports and Analytics

9.1 Running a report

To run a report, proceed as follows.

The screenshot displays the 'Report' section of the Alaris Labs interface. The top navigation bar includes 'Client' and 'Internal' tabs, a search bar, and a '+ New report' button. The left sidebar shows a list of reports under the 'Traffic' category, with 'Traffic by channel' selected (indicated by a red callout '1'). The main area shows the 'Traffic by channel' report configuration, including 'Period from' and 'Period till' date pickers (indicated by a red callout '2'). The right sidebar shows the 'Report info' section with a description. At the bottom right, there are 'Edit report' and 'Run report' buttons (indicated by a red callout '3').

Running a report

1. Select the report from the list.
2. Configure the report fields.
3. Click *Run report*.

The report will open in a separate tab as illustrated below.

Reports and Analytics

Report

Click *Export report* as (see (1) in the figure above) to export it in a CSV file.

9.2 Creating a new report

To create a new report, click *New report* [+ New report](#)

Create new report

*Report name

Campaign stats

*Categories

TRAFFIC X

Description

Campaign statistics

Available to clients

*SQL Query

```

1 select
2 format
3 (
4   'with s as
5   (
6     select
7       fi.name init_scenario,
8       f.name scenario,
9       t.id thread_id,
10      s.display_name sender_id,
11      t.conversation_id phone_number,
12      case t.state when 1 then 'error' when 6 then 'In progress' when 1 then 'Complete' when 1 then 'timeout' when 3 then 'Stuck' when 4 then 'Handover' end || case when ping_v_resp_code > 399 then
13      case when ping_is_sent then '/' and sent,
14      case when ping_is_delivered then '/' and delivered,
15      case when ping_is_seen then '/' when pong_phone_number is not null or array_length(btn.lbl, 1) > 0 then '/' end opened,
16      case when pong_phone_number is not null or array_length(btn.lbl, 1) > 0 then '/' end interacted,
17      f.name scenario

```

Parameters

+ Add new parameter to report

CAMPAIGN(S)

Parameter type

Multiselect

Required

Yes

Name

Campaign(s)

Bind name

broadcast_run_id

Default

Description

Campaign name

Data SQL query

[VIEW / EDIT](#)

Create new report

Complete the following fields:

1. *Report name*: name of the report that will be shown in the report list.
2. *Categories*: select the report category. Possible values are: *Traffic*, *Audit log* and *Finance*.
3. *Description*: provide an arbitrary description that will be shown in the *Report info* section.
4. *Available to clients*: when selected, the report is available both in BackOffice and Client portal. When deselected, it is only available in BackOffice.



Reports and Analytics

5. *SQL query*: write the query that will be used to generate the report.
6. *Add new parameter to report*: click to add a new parameter that will be used in report generation, such as start and end dates, campaign name etc.
7. Configure the parameter fields:
 - *Parameter type*: select the data type in the field. Possible values include:
 - *Checkbox*;
 - *Number field*;
 - *Spinner field*: a number field with stepping that allows selecting numerical values in specified increments such as 10, 20, 30 etc.;
 - *Combobox*;
 - *Multiselect*;
 - *Text field*;
 - *Date*;
 - *Date and time (local)*;
 - *Month and year*;
 - *Year*;
 - *Date and time (UTC)*.
 - *Required*: set the switch to Yes to make the parameter required.
 - *Name*: parameter name.
 - *Bind name*: name of the variable (bind) used in the SQL query.

NOTE: Variables that have their names starting with x_ are replaced with plain text values; all other variables are interpreted as regular binds.

- *Default (optional)*: default field value.
- *Description*: an explanation that will be shown next to the parameter in the *Report* interface.

NOTE: The location of parameters on the panel affects their order in the report. Use drag-and-drop to move the parameters.

8. Click *Save* to save the changes.

Settings

10 Settings

The *Settings* section contains the following interfaces:

1. *Vendors SMPP connections, Client SMPP connections, HTTP connections*: serve to create connections between the messenger and provider that offers access to the messenger. These connections are used when configuring Sender IDs for the respective channels ([Account management\Sender IDs](#)⁴⁴).
2. *Own legal entities*: serves to view and configure the System owner's legal entities.
3. *Notifications channels settings*: serves to configure channels for notifying users about various System events (currently only the email channel is available).
4. *2FA SMS*: serves to configure two-factor authentication services that the System owner can offer its clients (System users).
5. *Own bank accounts*: serves to display System owner's bank accounts.
6. *Payment systems*: serves to configure payment systems.

10.1 Vendors SMPP connections

The *Settings\Vendors SMPP connections* interface serves to configure Vendor SMPP connections with the provider for sending SMS messages.

Vendors SMPP connections							Columns	+ Add vendor SMPP Connection
ID	Name	Host name	Port	System ID	Status	MO inverse address mode		
4	SMPP connection 1	reget	4433	4fs	ACTIVE	false		

Vendors SMPP connections

Click *Add Vendor SMPP Connection* to add a new vendor connection. Proceed as detailed below.

Settings

Add Vendor SMPP Connection



***Name** 1

SMPP Connection for HoHo

Company IDs 2

Hornes and Hooves Ltd

***Host name** 3

hoho

***Port** 4

1234

***System ID** 5

hh1

***Password** 6

11111

System type 7

SS

SSL type 8

SSLv3

☒ **Limits** 9

RPS limit 10

10

Window limit 11

10

☒ **TLV used** 13

☒ **Inverted address mode**

Statuses map 12

[+ Add status](#)

☐ **Disable SMPP connection** 14

[Cancel](#) 15 [Save](#)

Add Vendor SMPP Connection

1. *Name*: add an arbitrary connection name.
2. *Company IDs*: select the company ID(s) from the drop-down list.
3. *Host name*: supply the hostname as given by the provider.
4. *Port*: supply the port as given by the provider.
5. *System ID*: supply the login for the SMPP connection as given by the provider.
6. *Password*: supply the password for the SMPP connection as given by the provider.



Settings

7. *System type*: provided by the SMPP vendor.
8. *SSL type*: provided by the SMPP vendor.
9. *Limits*: select the checkbox to specify connection limits.
10. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

11. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
12. *Use TLV, Inverse address mode*: set the values as provided by the SMPP vendor.
13. *Statuses map*: serves for correct message charging. This block of settings is used to set the System response to the message status received from the vendor. Click *Add status* to configure the System behavior to the message status received from the vendor.

Statuses map

*Status name

REJECT

+ Add code

+ Add status

Statuses map

- a. *Status name*: status received from the vendor.
- b. Click *Add code* to add error code and mapping method.
- c. Click to delete status name.

Settings

Statuses map: Add code

- d. *Error code(s)*: error code corresponding to the status.
- e. *Mapping method*: the desired processing method to be applied in case of receiving the above status and error code from the vendor. Available options: *Unsent*, *Undelivered*.
- f. Click to delete error code.
- g. Click *Add code* to add another code.

NOTE: Multiple error codes and mapping methods can be specified for a status name.

- h. Click *Add status* to add another status.

14. *Disable SMPP connection*: select to disable the connection.

15. Click *Save* to save the record or *Cancel* to discard the settings.

10.2 Client SMPP connections

The *Settings\Client SMPP connections* interface serves to configure the connections to the Client Message Centres (MCs). These connections are required for sending MO messages to the Client webhook.

NOTE: For detailed instructions on how to handle incoming SMPP traffic, please contact our technical support team.

Client SMPP connections					
ID	Name	Company	Network	Login	Status
3	la test	DS LTD.	32	sdqdwqdq	ACTIVE
4	VA_11	comp_agr_time		va_8791	ACTIVE
9	VA_switch	VA_switch	9	vav	ACTIVE

Client SMPP connections

1. Click to customize the display of columns.
2. Click *Add Client SMPP Connection* to add a new client connection.

Proceed as detailed below.

Settings

Add Client SMPP Connection



***Name** 1

***Company** 2

***Host name** 3

***Login** 4 ***Password** 5

System type 6 ***SSL type** 7

***Datacoding** 8

☒ **Disable SMPP connection** 9

10

Add Client SMPP Connection

1. *Name*: add an arbitrary connection name.
2. *Company*: select the name of the company.
3. *Host name*: supply the host name provided by your network service provider.
4. *Login*: supply the login for the SMPP connection as given by the provider.
5. *Password*: supply the password for the SMPP connection as given by the provider.
6. *System type*: technical details provided by the SMPP client.
7. *SSL type*: technical details provided by the SMPP client.
8. *Default datacoding*: select datacoding from the drop-down list.
9. *Disable SMPP connection*: select to disable the connection.
10. Click *Save* to save the record or *Cancel* to discard the settings.

10.3 HTTP connections

The *Settings\HTTP connections* interface serves to configure HTTP connections to the providers for the channels available over HTTP.



Settings

Starting from version 1.16.0 to add a new connection:

1. Create a vendor connection in the HTTP Connections interface.

NOTE: HTTP connections configured prior to the 1.16.0 release are automatically migrated and are marked as *Default*.

2. Associate the created connection to a Sender ID in the [Account management\Sender IDs](#) interface.

HTTP connections				
				Columns
				+ Add HTTP connection
ID	Name	Signature key	Status	Vendor type
63	Gupshup		ACTIVE	Gupshup
69	Gupshup updated URLs		ACTIVE	Gupshup
72	LA http connection		ACTIVE	Dialog360 Cloud
75	360cloud_sandbox		ACTIVE	Dialog360 Cloud
76	360Cloud_production		ACTIVE	Dialog360 Cloud
135	ErrorsConnection		ACTIVE	Elasticmail

HTTP connections

Click *Add HTTP Connection* to add a new connection. Proceed as detailed below.

NOTE: The fields differ based on the selected provider. For this reason, the connection settings may be different even within a single communication channel. Along with the HTTP connections in Backoffice, appropriate configurations must be made on the provider's side.

10.3.1 Viber

Add HTTP connection

1

2

3

4

5

6

7

8

9

*Name

HTTP

*Vendor type

Viber

Vendor URL

http://

*Service id

123

☒ Limits

RPS limit

10

Window limit

10

☐ Disable HTTP connection

Cancel

Save

Viber connection

1. *Name*: add an arbitrary connection name.

Settings

2. *Vendor type*: Viber.
3. *Vendor URL*: the URL supplied by the provider.
4. *Service ID*: value obtained via Viber Business Messaging account settings, required.
5. *Limits*: select the checkbox to specify connection limits.
6. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

7. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
8. *Disable HTTP connection*: select to disable the connection.
9. Click *Save* to save the record or *Cancel* to discard the settings.

NOTE: In the Viber Business Messaging it will be required to specify authorized IP addresses, Callback URL and Message URL. Please, proceed according to the following directions:

- Authorized IP addresses: please, contact the support to obtain this value. Note that a value obtained once may be reused for each new interconnection requiring third party whitelisting, not limited to Viber particularly.
 - Callback URL and Message URL: use the following URL format for both `https://<domain of Client portal>/api/v1/viber?bot_id=<bot ID>` where bot ID matches GUID created in [Account Management\Sender IDs](#) ⁴⁴.
-

Settings

10.3.2 Meta (MasOrange/Telin)

Add HTTP connection ×

*Name

HTTP

*Vendor type

Meta(MasOrange/Telin) ▼

Vendor URL

http://

☒ Limits

RPS limit

10

Window limit

10

☐ Disable HTTP connection

Cancel

Save

Meta (MasOrange/Telin) connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Meta (MasOrange/Telin).
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.3 Telin NeuAPIX

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. ***Name**: A text input field containing "HTTP".
- 2. ***Vendor type**: A dropdown menu showing "Telin NeuAPIX".
- 3. **Vendor URL**: A text input field containing "http://".
- 4. **Limits**: A checked checkbox.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: An unchecked radio button.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

Telin NeuAPIX connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Telin NeuAPIX.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.4 Gupshup

Add HTTP connection ×

*Name

HTTP

1

*Vendor type

Gupshup

2

Vendor URL

http://gupshup.io

3

Template URL

http://gupshup.io

4

Media URL

https://partner.gupshup.io/partner/app/11111/media

5

☒ Limits

6

RPS limit

10

7

Window limit

10

8

☐ Disable HTTP connection

9

Cancel

Save

10

Gupshup connection

1. *Name*: set the connection name.
2. *Vendor type*: Gupshup.
3. *Vendor URL*: the URL for session messages.
4. *Template URL*: the URL for template messages.
5. *Media URL*: URL for uploading media to Gupshup servers. The field shall contain a `https://partner.gupshup.io/partner/app/{your_appid}/media` link, where {your_appid} is replaced with a valid application ID from your Gupshup account.
6. *Limits*: select the checkbox to specify connection limits.
7. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

Settings

8. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
9. *Disable HTTP connection*: select to disable the connection.
10. Click *Save* to save the record or *Cancel* to discard the settings.

10.3.5 Gupshup v3

Add HTTP connection ×

*Name

1

HTTP

*Vendor type

2

Gupshup v3

Vendor URL

3

http://gupshupv3.io

Media URL

4

http://gupshupv3.io

5

☒ Limits

RPS limit

6

10

Window limit

7

10

8

☐ Disable HTTP connection

9

Cancel

Save

Gupshup v3 connection

1. *Name*: set the connection name.
2. *Vendor type*: Gupshup v3.
3. *Vendor URL*: the URL for session messages.
4. *Media URL*: URL for uploading media to Gupshup v3 servers. The field shall contain a `https://partner.gupshupv3.io/partner/app/{your_appid}/media` link, where {your_appid} is replaced with a valid application ID from your Gupshup v3 account.
5. *Limits*: select the checkbox to specify connection limits.
6. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

Settings

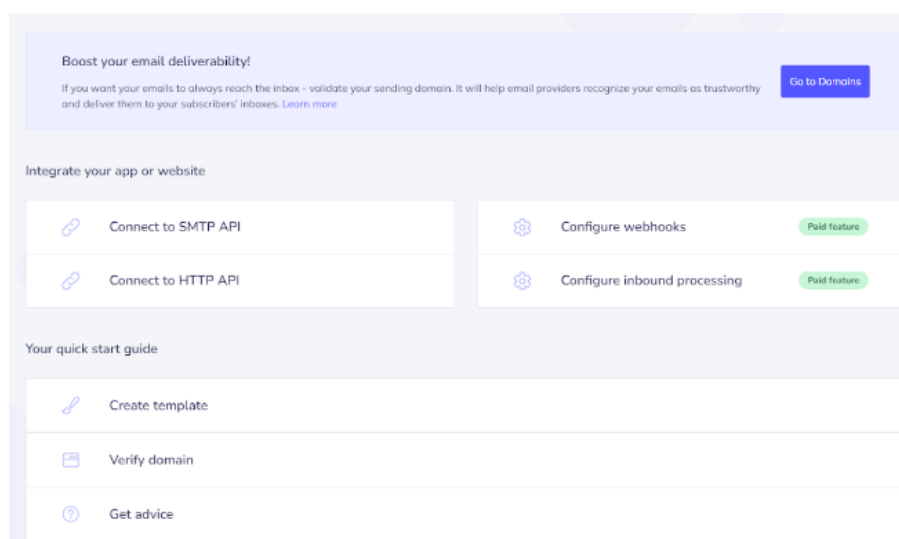
7. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
8. *Disable HTTP connection*: select to disable the connection.
9. Click *Save* to save the record or *Cancel* to discard the settings.

10.3.6 Elasticemail

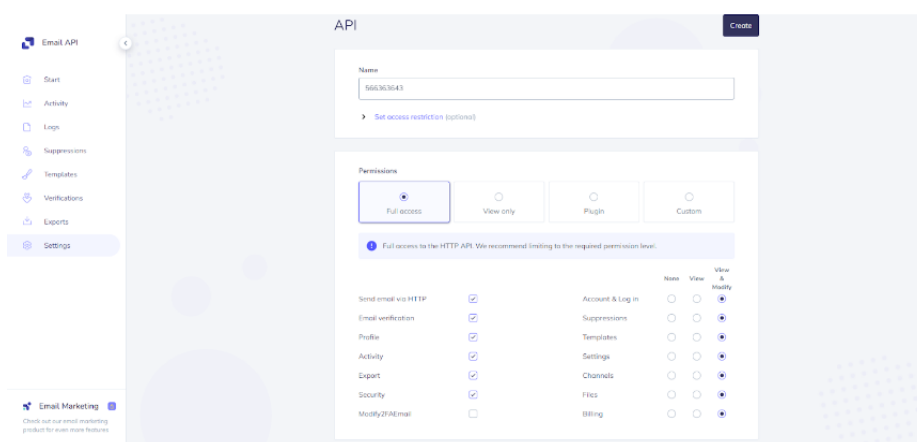
The platform provides an opportunity to configure connection via API with Elasticemail vendor, which is a convenient transactional email delivery service. To complete the integration, kindly perform the steps described below.

To create a connection with Elasticemail vendor:

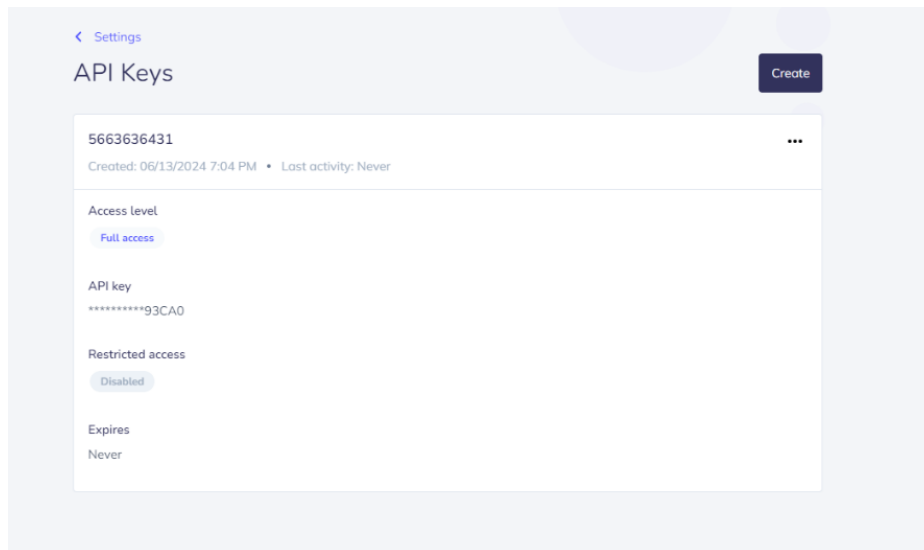
1. Create an account with the Elasticemail service. Log in and choose to connect to HTTP API as shown below:



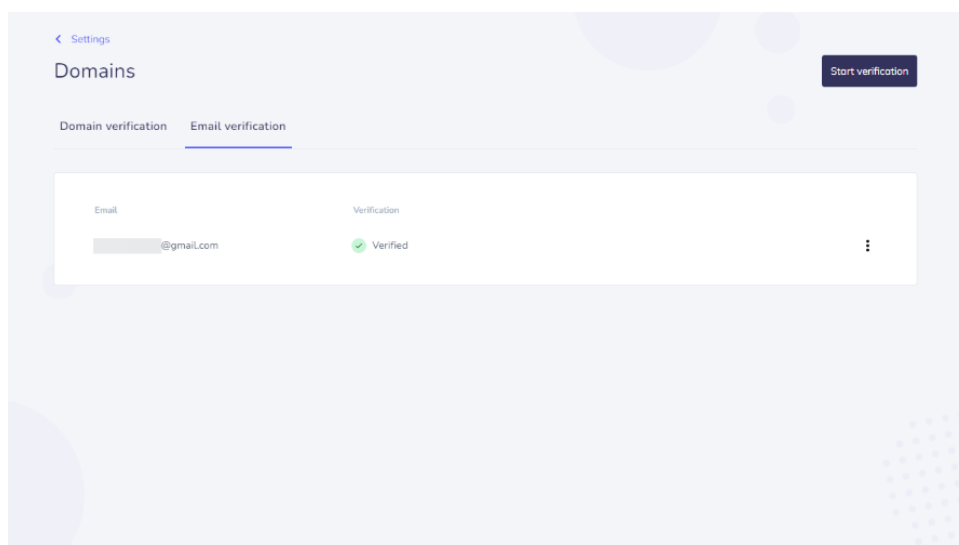
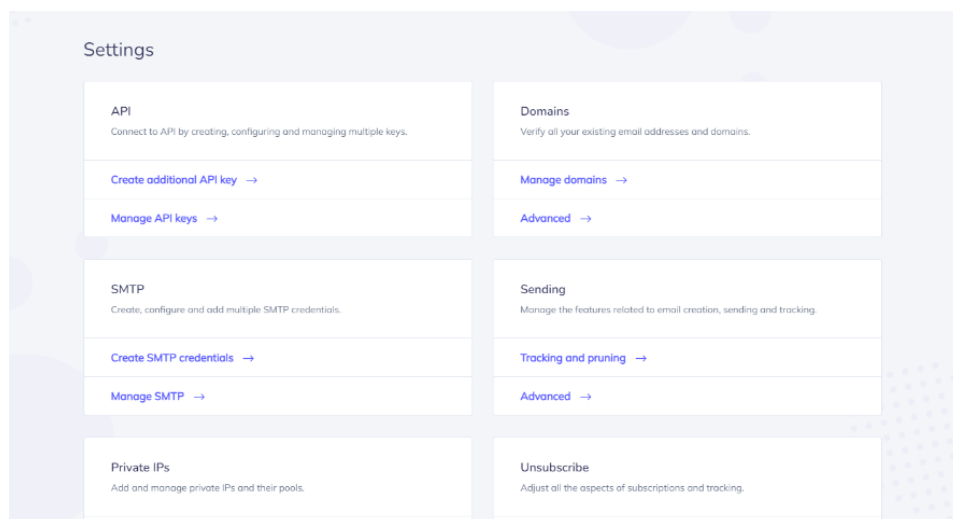
2. Create your API key with customized access:



Settings



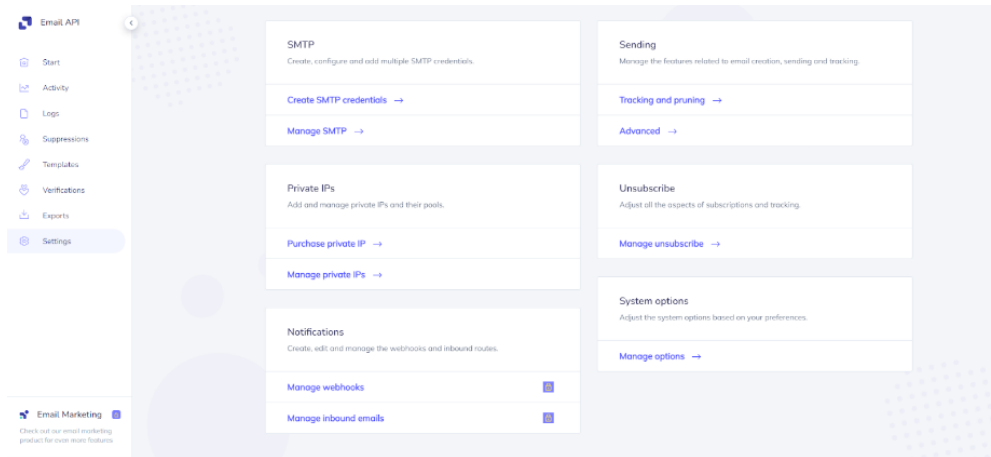
3. Add and verify your email account in Domains\Email verification page. You will receive a verification letter from Elasticemail to your inbox. Once your email is verified, it is possible to perform broadcasts.



4. After sending a successful email with API, available channels will be shown in Activity>Channels page.

Settings

5. Set up Webhook to receive message status update in Notification\Webhooks:



NOTE: In order to successfully receive callbacks and update Broadcast message sending statuses, the webhook URL which is set on Elastic Email side should be the following:
https://domainname/webhook/elasticemail?bot_id=<bot_id>, where *bot_id* is the Webhook GUID set for the Sender.

6. Set up the HTTP connection for Elasticemail vendor from the System side:

Elasticemail connection

- Name*: set the connection name.
- Vendor type*: Elasticemail
- Vendor URL*: the URL provided in the vendor's API (currently <https://api.elasticemail.com/v4>).
- Limits*: select the checkbox to specify connection limits.
- RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

Settings

- f. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
 - g. *Disable HTTP connection*: select to disable the connection.
 - h. Click *Save* to save the record or *Cancel* to discard the settings.
7. To complete the settings for the Elasticemail connection from your side, create a corresponding Sender ID as described in [Account Management\Sender IDs\Email Sender IDs](#) ⁷³.

10.3.7 Dialog360 Cloud

Add HTTP connection

*Name: HTTP

*Vendor type: Dialog360 Cloud

Vendor URL: http://waba-v2.dialog360.io

*Media URL: http://waba-v2.dialog360.io

☒ Limits

RPS limit: 10

Window limit: 10

☐ Disable HTTP connection

Cancel Save

Dialog360 Cloud connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Dialog360 Cloud.
3. *Vendor URL*: the URL supplied by the provider.
4. *Media URL*: an HTTP(S) link from which vendor will download the media.
5. *Limits*: select the checkbox to specify connection limits.
6. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

Settings

7. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
8. *Disable HTTP connection*: select to disable the connection.
9. Click *Save* to save the record or *Cancel* to discard the settings.

10.3.8 WeChat

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. **Name**: A text input field containing "HTTP".
- 2. **Vendor type**: A dropdown menu with "WeChat" selected.
- 3. **Vendor URL**: A text input field containing "http://wechat.com".
- 4. **Limits**: A checkbox that is checked.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: A radio button that is currently unselected.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

WeChat connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: WeChat.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.9 Telegram Gateway

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. **Name**: A text input field containing "HTTP".
- 2. **Vendor type**: A dropdown menu with "Telegram Gateway" selected.
- 3. **Vendor URL**: A text input field containing "http://gatewayapi.telegram.org".
- 4. **Limits**: A checkbox that is checked.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: A toggle switch that is currently turned off.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

Telegram Gateway connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Telegram Gateway.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.10 Telegram

Add HTTP connection ×

*Name 1

*Vendor type 2

Vendor URL 3

☒ Limits 4

RPS limit 5

Window limit 6

☐ Disable HTTP connection 7

Cancel Save 8

Telegram connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Telegram Gateway.
3. *Vendor URL*: https://api.telegram.org/bot.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.11 Dialog360

Add HTTP connection [X]

*Name 1
HTTP

*Vendor type 2
Dialog360

Vendor URL 3
http://360dialog.com

☒ Limits 4

RPS limit 5
10

Window limit 6
10

☐ Disable HTTP connection 7

Cancel Save 8

Dialog360 connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Dialog360.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.12 Nexmo

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. **Name**: A text input field containing "HTTP".
- 2. **Vendor type**: A dropdown menu with "Nexmo" selected.
- 3. **Vendor URL**: A text input field containing "http://vonage.com".
- 4. **Limits**: A checkbox that is checked.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: An unchecked toggle switch.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

Nexmo connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Nexmo.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.13 Transit Viber

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. ***Name**: A text input field containing "HTTP".
- 2. ***Vendor type**: A dropdown menu with "Transit Viber" selected.
- 3. **Vendor URL**: A text input field containing "http://1.2.33.444/api".
- 4. **Limits**: A checkbox that is checked.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: A toggle switch that is currently turned off.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

Transit Viber connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Transit Viber.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.14 RCS for Business

Add HTTP connection ×

*Name

HTTP

1

*Vendor type

RCS for Business

2

Vendor URL

http://rcsbusinessmessaging/api

3

4

☒ Limits

RPS limit

10

5

Window limit

10

6

7

☐ Disable HTTP connection

8

Cancel

Save

RCS for Business connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: RCS for Business.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

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Intelligent Control & Monetization for Telecom Business

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Settings

10.3.15 GSMA Transit

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a numbered red callout:

- 1. ***Name**: A text input field containing "HTTP".
- 2. ***Vendor type**: A dropdown menu with "GSMA Transit" selected.
- 3. **Vendor URL**: A text input field containing "http://".
- 4. ***Transit RCS authorization URL**: A text input field containing "http://".
- 5. **Limits**: A checkbox that is checked.
- 6. **RPS limit**: A text input field containing "10".
- 7. **Window limit**: A text input field containing "10".
- 8. **Disable HTTP connection**: A radio button that is currently unselected.
- 9. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

GSMA Transit connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: GSMA Transit.
3. *Vendor URL*: the URL supplied by the provider.
4. *Transit RCS authorization URL*: the authorization URL supplied by the provider.
5. *Limits*: select the checkbox to specify connection limits.
6. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

7. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
8. *Disable HTTP connection*: select to disable the connection.
9. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.16 Transit SMS

The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The dialog contains the following fields and controls, each with a numbered red callout:

- 1. ***Name**: A text input field containing "HTTP".
- 2. ***Vendor type**: A dropdown menu with "Transit SMS" selected.
- 3. **Vendor URL**: A text input field containing "http://".
- 4. **Limits**: A checkbox that is checked.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text input field containing "10".
- 7. **Disable HTTP connection**: A radio button that is currently unselected.
- 8. **Buttons**: "Cancel" and "Save" buttons at the bottom right.

Transit SMS connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Transit SMS.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

Settings

10.3.17 Mobile Push

Add HTTP connection ×

*Name

Mobile Push

1

*Vendor type

Mobile Push

2

Vendor URL

www

3

☒ Limits

4

RPS limit

50

5

Window limit

10

6

☐ Disable HTTP connection

7

8

Cancel

Save

Mobile Push connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Mobile Push.
3. *Vendor URL*: the URL supplied by the provider.
4. *Limits*: select the checkbox to specify connection limits.
5. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.

NOTE: The actual RPS value at the time of sending can be viewed in the *RPS by broadcast* and *RPS timeline for broadcast* reports.

6. *Window limit*: the limit of the message processing pool. The recommended value for this field should not exceed 100.
7. *Disable HTTP connection*: select to disable the connection.
8. Click *Save* to save the record or *Cancel* to discard the settings.

10.4 Own legal entities

The *Settings\Own legal entities* interface serves to view and configure the System owner's legal entities. It consists of two tabs: *Own legal entities* and *Self-registration settings*.

Settings

10.4.1 Own legal entities

Own legal entities								
Self-registration settings								
Columns + Add Legal entity								
ID	Portal	Name	Comp...	Country	Legal ...	Billing...	Legal ...	Tax ID...
41767202		AT_OLE1	System owner	Zimbabwe			AT	
41767155	from appp	yoyoyoy	System owner	Zimbabwe			yoyoyoyo	
41767076		VV	System owner	Zimbabwe			VAGA	
41767073		VA	System owner	Zimbabwe			VA - -Legal c...	
K < Page 1 of 1 > » Show 100 Rows 1-23 of 23								

Own legal entities tab

Click *Add Legal entity* to add a new record. Proceed as detailed below.

Settings

Add Legal entity

14 X

1

*Name

Hornes and Hooves

2

*Legal company name

Hornes and Hooves, Inc.

3

*Country

Canada

4

Portal

from app

5

Tax ID number

12345678

6

*Legal ID number

654321

7

VAT ID number

Enter value

8

Legal address

77 Barn str. NowHere

9

Billing address

77 Barn str. NowHere

10

Default notification emails

default@hoho.com

11

Payment systems

STRIPE DEFAULT (STRIPE) X Select...

12

☒ Is Default

13

Cancel

Save

Add Legal entity

1. *Name*: add the name that will be displayed in the table of legal entities.
2. *Legal company name*: supply the official company name.

Settings

3. *Country*: country of registration.
4. *Portal*: select a portal created in Portals. If none are created, you can create and associate it with the legal entity later.
5. *Tax ID number*: an identifying number used for tax purposes.
6. *Legal ID number*: registration number of the legal entity in the country of registration.
7. *VAT ID number*: ID for EU-registered companies.
8. *Legal address*: the address where the legal entity is registered.
9. *Billing address*: the address that the invoice is sent to.
10. *Default notification emails*: email of the user who will receive System event notifications.
11. *Payment systems*: payment systems associated with the legal entity. Payment systems are created in the [Settings\Payments systems](#) ²³⁸ interface.
12. *Is default*: the default legal entity is selected by default in all legal entity entry forms.
13. Click *Save* to save the record or *Cancel* to discard the settings.
14. Click to close the form.

10.4.2 Self-registration settings

Own legal entities		Self-registration settings					Columns + Add new set	
ID	Portal	Own legal enti...	Self registration	Verification	Moderation	Currency		
70	from appp	yoyoyoy	DISABLED	DISABLED	DISABLED	USD		
38	va	VA	ACTIVE	ACTIVE	ACTIVE	EUR		
24	m	Vit	ACTIVE	DISABLED	DISABLED	EUR		

Self-registration settings tab

Click *Add new set* to add self-registration and proceed as detailed below.

The *Add Self-registration* form consists of two tabs: *General* and *Roles*.

Settings

Add Self-registration



General

Roles

*Own legal entities

System owner

*Portal

Demo

*Own Bank Account

UNKNOWN-1

☒ Self registration enabled

Terms of Service

Terms of Service

Formats available: pdf

Privacy Policy

Privacy Policy

Formats available: pdf

☒ Mobile phone verification

*Integration

Self_registration_2fa (Self_registration_s

*Report email

abc@demo.com

☐ Moderation

☐ Two Factor Authentication for users

Agreement Details

*Agreement prefix

123

*Currency

EUR

*Credit limit

500

*Billing timezone

Europe/Zagreb

*Billing period

Daily

Billing day

1

☐ Split by month

Services & Packs

*Services

SMS (EUR) X

Packs

1 EUR ON MESSAGES - WELCOME BONUS (EU... X

Cancel

Save

Add Self-registration (General tab)

1. *Own legal entities*: select the System owner's legal entities.
2. *Portal*: select a portal created in Portals.
3. *Own Bank account*: select Own Bank account created in the [Settings\Own bank accounts](#) ²³⁵ interface.
4. *Self-registration enabled*: select the checkbox to enable self-registration.



Settings

5. *Terms of service, Privacy Policy*: upload the Terms of Service and the Privacy Policy in pdf.
6. *Mobile phone verification*: select the checkbox to enable mobile phone verification.
7. *Integration*: select integration created in the [2FA interface](#).
8. *Report email*: enter the report email.
9. *Moderation*: select the checkbox to enable moderation.
10. *Two Factor Authentication for users*: select the checkbox to enable two-factor authentication for users.
11. *Agreement details*: provide the agreement details (*Agreement prefix, Currency, Credit limit, Billing timezone, Billing period, Billing day*).
12. *Split by month*: select the checkbox to split the billing period by month.
13. *Services and packs*: select services and packs.
14. Click *Save* to save the changes and proceed to the *Roles* tab or *Cancel* to discard the settings.

Add Self-registration

General

Roles

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER

Permissions

The areas of system this user can view or manage

Export (0 of 1)	▼
Dashboard (1 of 1)	▼
API Accesses (0 of 1)	▼
Statistics (2 of 4)	▼
2FA SMS (0 of 1)	▼

Cancel

Save

Add Self-registration (Roles tab)

1. *No restrictions*: select for the user to have the *Admin* role and have unrestricted access to all objects and actions.
2. *Role*: select a role from the drop-down list of the available roles.
3. *Permissions*: section with the permissions that will be assigned to the user with this role.

NOTE: The *Role* and *Permissions* controls are available only if *No restrictions* checkbox is unchecked.

4. Click *Save* to save the changes or *Cancel* to discard the settings.

Double click on the record in the table to view and edit self-registration.

Settings

View Self-registration ID 38General

Roles

Core Details

Own legal entities

Missed option: 41767073

Portal

va_test1

Own Bank Account

Bahamas Resorts, Hospitality

☒ Self registration enabled

Terms of Service

Terms of Service

Formats available: pdf

Privacy Policy

Privacy Policy

Formats available: pdf

☐ Mobile phone verification

Integration

VA_123123 (VA_smpp)

Report email

va@abc.com

☒ Moderation☐ Two Factor Authentication for users

Agreement Details

Agreement prefix

VA_354

Currency

EUR

Credit limit

1

Billing timezone

Etc/UTC

Billing period

Daily

Billing day

5

☐ Split by month☒ Invoices enabled

Services & Packs

Services

EUR PACKS (EUR)

3

Delete

Packs

2

Cancel

1

Edit

View Self-registration (General tab)

1. Click *Edit* to start editing a Self-registration.
2. Click *Cancel* to return to the *Self-registration settings* page.
3. Click *Delete* to delete a self-registration.



Settings

View Self-registration ID 38General Roles

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER NOC ENGINEER



Permissions

The areas of system this user can view or manage

Export (0 of 1)



Dashboard (0 of 1)



3

Delete

2

Cancel

1

Edit

View Self-registration (Role tab)

1. Click *Edit* to start editing the role.
2. Click *Cancel* to return to the *Self-registration settings* page.
3. Click *Delete* to delete a self-registration.



Settings

Edit Self-registration ID 38 ×

General Roles

Core Details

*Own legal entities

Missed option: 41767073

*Portal

va_test1

*Own Bank Account

Bahamas Resorts, Hospitality

☒ Self registration enabled

Terms of Service

Terms of Service

Formats available: pdf

Privacy Policy

Privacy Policy

Formats available: pdf

☐ Mobile phone verification

*Integration

VA_123123 (VA_smpp)

*Report email

va@abc.com

☒ Moderation

☐ Two Factor Authentication for users

Agreement Details

*Agreement prefix

VA_354

*Currency

EUR

*Credit limit

1

*Billing timezone

Etc/UTC

*Billing period

Daily

Billing day

5

☐ Split by month

☒ Invoices enabled

Services & Packs

*Services

EUR PACKS (EUR) X

Packs

4

Delete

3

Cancel

2

Save

Edit Self-registration (General tab)

1. Edit the record as appropriate.
2. Click *Save* to save the changes.
3. Click *Cancel* to discard the settings.
4. Click *Delete* to delete the self-registration.

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Intelligent Control & Monetization for Telecom Business

↗

Settings

Edit Self-registration

ID 38

×

General

Roles

☐ No restrictions
Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER X

NOC ENGINEER X

⋮

Permissions

The areas of system this user can view or manage

Export (0 of 1)

Dashboard (0 of 1)

Delete

Cancel

Save

Edit Self-registration (Role tab)

1. Edit the record as appropriate.
2. Click *Save* to save the changes.
3. Click *Cancel* to discard the settings.
4. Click *Delete* to delete the self-registration.
5. *No restrictions*: select to assign the *Admin* role (a role without restrictions) to a user.

NOTE: Permissions are not editable and are updated together with the *Role*.

10.5 Notification and Mail Settings

The *Notification and Mail Settings* interface serves to manage notifications and notification channels. The System automatically generates notification emails when an event occurs and sends them to recipients. The interface consists of two tabs: [Templates](#)^[212], [Notification Channels](#)^[221] and [Recipients](#)^[226].

10.5.1 Templates

The *Templates* tab serves to manage email templates. A personalized template for each event can be created for each legal entity of the System owner's company.

By default, the System provides templates for all supported events. These templates apply to all of the company's *Own legal entities* and will be sent by the System in case a trigger event occurs with a reseller/client or in the system. If a customized template on behalf of a specific legal entity is needed, a separate template is created and assigned the value of that legal entity. In this case, the customized notification will be sent to clients/partners of that legal entity, and the default notification will be sent to clients/partners of other legal entities. Each legal entity can only have one template for one event.

Settings

Templates						
Notification channels						
Recipients						
ID	Name	Type	Event	Own le...	Updat...	Actions
4115	Agreement Balance Alerts	Finance	Agreement Balance Alerts		30.01.2026 ...	
4116	Credit Limit Alerts	Finance	Credit Limit Alerts		24.02.2026 ...	
4117	Bundle Pack Limit alerts	Finance	Bundle Pack Limit alerts		23.01.2026 ...	
4118	Payment Confirmation	Finance	Payment Confirmation		26.01.2026 ...	
4119	Traffic monitoring alert	Technical	Traffic monitoring alert		23.01.2026 ...	
4120	New Sender ID Request	Moderation	New Sender ID Request		20.02.2026 ...	
4121	Sender ID Activation	Moderation	Sender ID Activation		19.02.2026 ...	
4122	Broadcast Approval	Moderation	Broadcast Approval		23.01.2026 ...	
4123	Company Moderation	Moderation	Company Moderation		16.03.2026 ...	
4124	User Registration Confirmation	Personal Info...	User Registration Confirmation		23.01.2026 ...	
4125	Password Reset Request	Personal Info...	Password Reset Request		23.01.2026 ...	

Templates

1. Click to customize the display of columns.
2. Click  to edit a template or  to copy it.
3. Click to create a new template and proceed as detailed below.

Add Notification template



*Template name 1

New template

*Own legal entity 2

AB Kiwi

*Notification type 3

Finance

*Event 4

Agreement Balance Alerts

5 Cancel 6 Email constructor >

Add Notification template

1. *Template name*: specify the name of a template.
2. *Own legal entity*: select the company that the template will be created for.
3. *Notification type*: a larger group of notifications that combines several related events. Select the notification type from the drop-down list. The following template types are available:
 - o *Finance*: notifications related to financial operations;
 - o *Technical*: notifications related to connection errors;



Settings

- *Moderation*: notifications related to registration/rejection of Sender ID/ WhatsApp template;
- *Personal Information*: notifications related to registration/change of password.
- *Reports and Export Results*: notifications related to system errors, report availability and export status.
- *Payments*: notifications related to payment statuses.

NOTE: Template types are labeled as *Default* if used for notification to all own legal entities. Notifications without labels are sent only to the clients of the specified *Own legal entity*.

4. *Event*: trigger event for the notification process. Select the event from the drop-down list. The following trigger events are available in the System:
 - *Agreement Balance Alerts*: emails notifying about a low balance of the partner account (Hello, {{name}}! Your account balance for agreement {{agreement_code}} has reached the threshold {{threshold}}! Please check your account to avoid service interruptions.);
 - *Credit Limit Alerts*: emails notifying about a low credit limit of the partner account (Hello, {{name}}! Your credit limit for agreement {{agreement_code}} has reached the threshold {{threshold}}! Please check your account to avoid service interruptions.);
 - *Bundle Pack Limit alerts*: emails notifying about low Bundle Pack balance (Hello, {{name}}! The number of unique recipients in your bundle pack enable_id={{bundle_enabled_id}} has reached the threshold {{threshold}}! Please check your account to avoid service interruptions.);
 - *Balance Quota Alerts*: emails notifying that the daily balance consumption limit has been reached (Hello! Your daily limit for agreement {{agreement_code}} has reached the threshold {{threshold}}! Please check your account to avoid service interruptions.);
 - *Traffic monitoring alert*: emails notifying about ongoing issues with outbound traffic (Hi, {{name}}! For sender {{sender_id}}, an outgoing traffic issue has been detected in the last {{window_size}} minutes.);
 - *New Sender ID Request*: emails notifying about a new Sender ID request from a client (Hello, {{name}}! Request for sender ID {{sender_id}} has been received.);
 - *Sender ID Activation*: emails notifying about Sender ID approval (Hello, {{name}}! Your Sender ID {{.sender_name}} is activated);
 - *Broadcast Approval*: emails notifying about broadcast confirmation (Hello, {{name}}! Your request for broadcast {{broadcast_name}} has been approved. Launch time: {{broadcast_launch_time}}.);
 - *Company Moderation*: emails notifying about moderation being enabled for a company (Hello, {{name}}! This is a notification to inform you that you need to moderate your campaigns by a partner before sending. Thank you!);
 - *User Registration Confirmation*: emails notifying about user registration (Dear {{surname}} {{name}}, Thanks for registering at our portal! Please follow this link: {{registration_link}} and activate your account.);
 - *Password Reset Request*: emails notifying about password reset request (Dear {{name}} {{surname}}, We received a request to reset your password for your {{company_name}} account. To proceed, simply click on the link below: {{password_reset_link}}. If you did not request a password reset, please disregard this email. Your account will remain secure. The link will expire after password change. Thank you!);

Settings

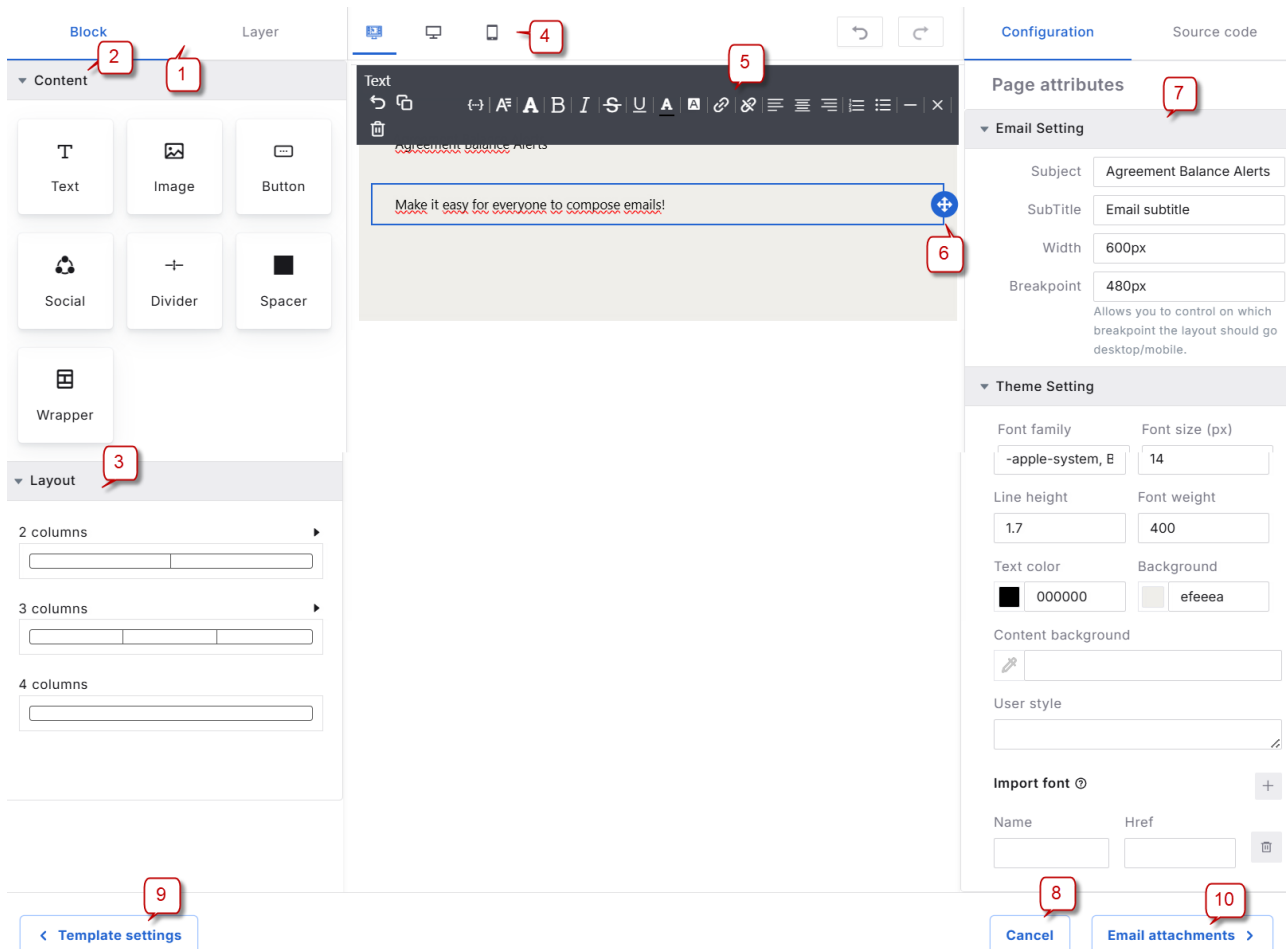
- *User invitation*: emails inviting a user to sign up in the System (Hello! You have received an invitation to access {{portal_name}}. Please follow the link to complete the registration process: {{invitation_link}}. The invitation is valid until {{token_expiration_date}}. If you have any questions, please, contact your partner (The template is used to invite a user to complete the registration in the System);
- *Successful Password Change*: emails notifying that the user password has been changed (Hello! The password for your user {{user_login}} for the portal on the page {{portal_name}} has been changed! If the request was sent by you, you can safely ignore this email. Otherwise, please contact the system owner to restore access.);
- *Password Change Unsuccessful*: emails notifying that the user password hasn't been changed (Hello! There has been an unsuccessful attempt to change your password! Please try again. If you have forgotten your password, please contact our support team for assistance.);
- *Problem Report*: emails notifying about a problem with self-registration (Hi, {{name}}! Registration processing was interrupted by an error: {{text}}Email for feedback: {{email}});
- *Payment Confirmation*: emails notifying about received payments (Hi, {{name}}! Your payment in the amount of {{payment_currency_amount}} {{payment_currency_code}} has been received! Current balance:{{balance}}. Thank you for prompt payment!).

NOTE: Only one template can be created by a legal entity for an event.

5. Click *Cancel* to discard the settings.
6. Click *Email constructor* to configure the email.

The email message constructor allows configuring the message content and layout.

Settings



Email message constructor

1. Select *Block* to configure the email message elements, or *Layers* to view the list of elements and switch between them.
2. *Content*: drag&drop an element to add it to the message. The following elements are available:
 - a. *Text*;
 - b. *Image*;
 - c. *Button*: a button with text and link;
 - d. *Social*: links to social media;
 - e. *Divider*: a line that separates the message blocks;
 - f. *Spacer*: a rectangular shape that separates the message blocks;
 - g. *Wrapper*: a marked out section in the message that can contain any of the above elements.
3. *Layout*: choose the number of columns to organize the message into.
4. See how the message is displayed on different screens. Click  for a regular screen,  for a wide screen and  for a smartphone screen.
5. Use the toolbar to edit the formatting of text elements.

Settings

6. Drag&drop the  control to move the message element.
7. Configure the properties of the message element as appropriate.
8. Click *Cancel* to discard the email settings. Confirm (a) or discard the action (b) in the *Unsaved data will be lost* panel as detailed in the figure below.

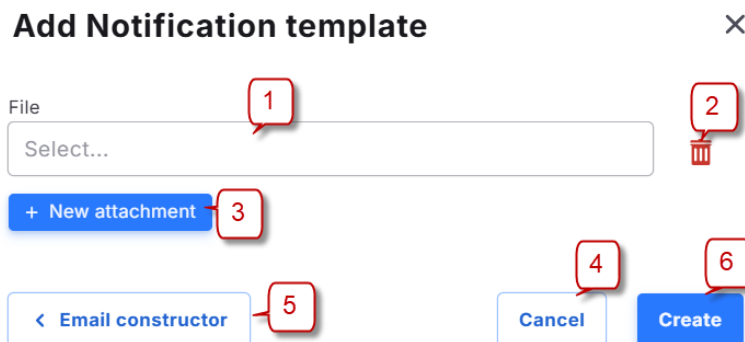
Unsaved data will be lost

You are going to close the window containing unsaved data, which be lost. Are you sure?



Unsaved data will be lost panel

9. Click *Template settings* to close the constructor and return to the *Add Notification template* form.
10. Click *Email attachments* to add attachments to the notification email.



Add Email attachments

1. *File*: download a file from your device.
2. Click to delete the file.
3. Click to add new attachment.
4. Click *Cancel* to discard the email settings.
5. Click to return to the *Email constructor*.
6. Click *Create* to complete the process.

Double click on the record in the table to view a notification template.

Settings

View Notification template



Template name

Payment Confirmation

Own legal entity

Notification type

Finance

Event

Payment Confirmation

Edit

Email constructor >

View Notification template (1)

1. Click to view the message in the Email constructor and proceed as detailed in the figure below.
2. Click to edit the template.

View Notification template



Email subject: Payment received

Hello! Your payment in the amount of {{.payment_currency_amount}}
{{.payment_currency_code}} has been received! Current balance: {{.balance}}.
Thank you for prompt payment!

< Template settings

Edit

Email attachments >

View Notification template (2)

1. Click to view the Email attachments and proceed as detailed in the figure below.
2. Click to edit the text of the email.
3. Click to return to the Template settings panel.



Settings

View Notification template



File

[+ New attachment](#)[< Email constructor](#)[Edit](#)

View Notification template (3)

1. Click to edit the attachments.
2. Click to return to the Email constructor.

Click  in the *Actions* column or *Edit* in the *View Notification* template to edit a template.

Edit Notification template



*Template name

Own legal entity

Notification type

Event

[Cancel](#)[Email constructor >](#)

Edit Notification template (1)

1. Click to edit the message in the Email constructor and proceed as detailed in the figure below.
2. Click *Cancel* to close the form and return to the *Templates* table.



Settings

The screenshot shows the 'Settings' interface for editing a notification template. The main preview area displays a message: "Hello! Your account balance for agreement {{.agreement_code}} has reached the threshold {{.threshold}}!! Please check your account to avoid service interruptions." Above the preview, there are icons for desktop, tablet, and mobile views, and a red callout '1' points to the mobile view icon. To the right, a sidebar titled 'Block' and 'Layer' contains a 'Content' section with options: Text, Image, Button, Social, Divider, and Spacer, and a 'Layout' section with options for 2, 3, and 4 columns. At the bottom, there are three buttons: '< Template settings' (with a red callout '3'), 'Cancel' (with a red callout '2'), and 'Email attachments >' (with a red callout '4').

Edit Notification template (2)

1. Edit the message as appropriate.
2. Click *Cancel* to close the form and return to the *Templates* table.
3. Click to return to the *Template settings* form.
4. Click to edit the Email attachments and proceed as detailed in the figure below.

Settings

Edit Notification template



File

Select...



+ New attachment

< Email constructor

Cancel

Save changes

Edit Notification template (3)

1. Edit the attachments as appropriate.
2. Click *Save* to save the changes.
3. Click *Cancel* to discard the settings.
4. Click to return to the Email constructor.

10.5.2 Notification channels

The *Notification channels* tab serves to manage the settings of the mail servers that are used to send notifications. Sender settings are available for each System owner's legal entity.

NOTE: To ensure proper notification sending, it is important to have at least one channel with the *Legal entity* = *All* (empty field) parameter. Notifications will be sent through this channel unless a separate channel has been created for a specific legal entity.

Templates <u>Notification channels</u> Recipients						
ID	Mail server name	Status	Own leg...	Updated	Updated by	Actions
1	email	ACTIVE		23.12.2025 1...	Morgan Freeman	
2	test123	DISABLED	AB Kiwi	23.12.2025 1...	Morgan Freeman	
3	VA_base email channel	DISABLED	System owner	10.02.2026 1...	VA_dev2 VA_dev2	 
4	base email channel	ACTIVE	yoyoyoy	14.01.2026 1...	Morgan Freeman	
6	VA	ACTIVE	anbe_for_Self - ...	20.02.2026 1...	VA_dev2 VA_dev2	

Notifications channels settings

1. Click to customize the display of columns.
2. Click  to edit a notification channel or  to delete the record.
3. Click to create a new notification channel and proceed as detailed below.



Settings

Add Notification channel



***Mail server name** 1

Rogue1 2

☒ Enabled

Own legal entity 3

AT_9390619

From address details

From name 4

K2SO

***From email address** 5

k2so@aaa.com

***Reply to** 6

k2so@aaa.com

Server authentication

***SMTP Hosts** 7

11.11.111.111

***SMTP Port** 8

1111

TLS Protocol 9

☒ Enabled

***Login** 10

K2SO

***Password** 11

12345 12

[Cancel](#) [Save](#)

Add Notification channel

1. *Mail server name*: specify the name of a server.
2. *Enabled*: select to activate the server.
3. *Own legal entity*: select the name of the own legal entity that the template will be created for.
4. *From name*: specify the name of the notification sender.
5. *From email address*: specify the email address of the notification sender.



Settings

6. *Reply to:* specify the email address that notification replies will be sent to. This may differ from the sender's email address. If the user decides to reply to the email in their mailbox, the email will be sent to this specified address.
7. *SMTP hosts:* specify the mail server's IP address or domain.
8. *SMTP port:* specify the mail server port to be used as communication endpoint.
9. *TLS Protocol Enabled:* select to enable TLS (Transport Layer Security).
10. *Login:* specify the user name for the mail server used for authentication on the SMTP server. The system uses this login to log in to the SMTP server before sending an email.
11. *Password:* specify the password for the mail server that corresponds to the specified user name on the SMTP server. The password is typed in together with the login so that the server can confirm that the System has the right to use this account to send emails.
12. Click *Save* to save the record or *Cancel* to discard the settings.

Click on a record in the table to view the mail server record.

Settings

View Notification channel



Mail server name

AT_api_template_4783224

☒ Enabled

Own legal entity

Missed option: 41771548

From address details

From name

AT_name_4259784

From email address

AT_1887440@exapmle.com

Reply to

AT_4381664@exapmle.com

Server authentication

SMTP Hosts

smtp.example.com

SMTP Port

587

TLS Protocol

☒ Enabled

Login

AT_user_6526134

Password

AT_pwd_8285599

2

Cancel

1

Edit

View Notification channel

1. Click *Edit* to start editing the mail server.
2. Click *Cancel* to close the form.



Settings

Edit Notification channel



*Mail server name

AT_api_template_4783224

☒ Enabled

Own legal entity

Missed option: 41771548

From address details

From name

AT_name_4259784

*From email address

AT_1887440@exapmle.com

*Reply to

AT_4381664@exapmle.com

Server authentication

*SMTP Hosts

smtp.example.com

*SMTP Port

587

TLS Protocol

☒ Enabled

*Login

AT_user_6526134

*Password

AT_pwd_8285599

Cancel

Save

Edit Notification channel

1. Edit the mail server properties as appropriate.
2. Click *Save* to save the changes.
3. Click *Cancel* to discard the settings.



Settings

10.5.3 Recipients

The *Recipients* tab serves to manage all notification recipients, to edit internal recipients (BackOffice and Client portal users) as well as create and edit external recipients (those who do not have personal accounts on the platform). The tab also serves to manage notifications for different entities (*Agreement*, *Own legal entity* and others) in a single window.

The tab consists of a list of all recipients in a single table, along with all the notifications enabled for them.

The screenshot displays the 'Recipients' tab in the settings interface. At the top, there are tabs for 'Templates', 'Notification channels', and 'Recipients'. Below these are filter buttons for 'Event: All', 'Legal entity: All', 'Company: All', and 'Agreement: All'. To the right are buttons for 'Columns' and '+ New'. The main area is a table with the following data:

ID	Recipient	Company	Updated
1	dfgsh@dfddg.com guest	VA_payment 1 / 1	7 days ago
3	test2@gmail.com guest	kiwi 3 / 3	7 days ago
6	123 123 123123@gmail.com	VA_payment 1 / 1	7 days ago
8	test@gmail.com guest	VA_selreg_2b 3 / 3	7 days ago

A context menu is open over the first row, showing 'Edit' and 'Delete' options.

Recipients

1. Use the following preset filters to search for recipients:
 - a. *Event*: drop-down list containing all event notifications.
 - b. *Legal entity*: drop-down list containing all of the partner's legal entities.
 - c. *Company*: drop-down list containing a list of all the partner's companies.
 - d. *Agreement*: drop-down list containing a list of all the partner's agreements.

NOTE: Multiple selection is available for all preset filters.

2. Click to edit or delete a recipient.
3. Click to customize the display of columns.
4. Click to create a new recipient and proceed as detailed below.

Settings

Add Recipient ×

*First name

1

Din

Last name

2

Djarin

*From email address

3

dd@grogu.com

Notifications*

Select the notifications this user can receive.

4

Add

Comment

5

This is the way

6

Cancel

Save

Add Recipient

1. *Name*: specify the recipient's name.
2. *Last name*: specify the recipient's last name.
3. *From email address*: enter the recipients email address.
4. *Notifications*: click *Add* to enable notifications that will be sent to the recipient's email address and proceed as detailed below.
5. *Comment*: type an arbitrary comment if appropriate.
6. Click *Save* to save the recipient or *Cancel* to discard the changes.

Settings

×

Add Notification

*Own legal entity 1

AB Kiwi

*Subscription objects 2

HORNES AND HOOVES(1) × Select...

*Notification settings 3

☒ Agreement Balance Alerts

☐ Credit Limit Alerts

4

Cancel

Add

Add Notification

1. *Own legal entity*: select Own legal entity from the drop-down list.
2. *Subscription objects*: click to select the client company, its legal entity and agreement.

×

Add Notification

a subscription objects

Select...

b > Company7647

v AB For reselling

c v ☒ Hornes and Hooves

☒ ab for reselling , EUR

> kiwi

d

Cancel

Add

Subscription objects

- a. Click on the field to expand the list and select the client company.
- b. Click to expand the list of client's legal entities and select the legal entity.
- c. Click to expand the list of agreements associated with the legal entity and select the agreement.

Settings

- d. Click outside the drop-down list to return to the *Add Notification* form and select notifications that a user can receive.
3. *Notification settings*: select the notifications to be received by a user from the list.
4. Click *Save* to save the notifications settings or *Cancel* to discard the changes.

NOTE: The *Add Recipient* form serves to create only external recipients (*Type=External*), while internal recipients are created automatically when a user is created.

Click on a record in the table to view the recipient.

View Recipient

×

First name

Last name

From email address

test@gmail.com

Notifications*

Company: All Legal entity: All Event: All ☐ Active only Add

> System owner

> VA

> AB Kiwi

3 Delete

2 Cancel

1 Edit

View Recipient

1. Click *Edit* to start editing the recipient.
2. Click *Cancel* to close the form.
3. Click *Delete* to delete the recipient.

Settings

Edit Recipient

1

X

*First name

Enter name

Last name

Enter name

*From email address

test@gmail.com

Notifications*

Company: All

Legal entity: All

Event: All

☐ Active only

Add

>  System owner>  VA>  AB Kiwi

Comment

Enter value

3

Delete

2

Cancel

Save

Edit Recipient

1. Edit the recipient's data as appropriate.
2. Click *Save* to save the changes or *Cancel* to discard the settings.
3. Click *Delete* to delete the recipient.

10.6 2FA SMS

The *Settings\2FA SMS* interface serves to configure two-factor authentication services that the System owner can offer its clients (System users). Such two-factor authorization can be integrated in client websites, portals and other services.

The integration created in this section (on the platform side) can also be used to enable two-factor authentication of users/companies in the Client Portal and BackOffice. To configure such integration and get additional instructions, please contact our technical support team.

2FA SMS						1	2	3
ID	Name	Company	Sender ID	Status	Created	Actions		
11	Code for client Ella	Demo AY	sms_http	ACTIVE	18.11.2024			
10	Self_registration_2fa	System owner 	Self_registration_sender	ACTIVE	11.11.2024			
9	2fa	Demo AY	7955A739007	ACTIVE	15.07.2024			
4	Verification code Client Belle	Demo AY	sms_http	BLOCKED	23.04.2024			
3	Update code	Demo AY	sms_http	DRAFT	23.04.2024			
2	Client Ella	Demo AY	sms_http	BLOCKED	23.04.2024			

Two-factor authentication

Settings

1. The table contains the following parameters:
 - a. *ID*: the record ID in the System.
 - b. *Name*: the record name.
 - c. *Company*: the company that 2FA is related to.
 - d. *Sender ID*: the sender ID that is used for sending SMS messages with authentication codes.
 - e. *Status*: record status. Possible values include:
 - i. *Active*: the record is operative.
 - ii. *Draft*: the record is not activated.
 - iii. *Blocked*: the record is blocked.
 - f. *Created*: the record creation date.
 - g. *Actions*: contains the *View* and *Statistic* buttons explained in [Edit 2FA integration](#)²³³ and [Statistics](#)²³⁵ below.
2. Click *Custom view* to customize the display of columns.
3. Click *Add Integration* to add a new 2FA integration record.

NOTE: 2FA Messaging API Workflow is detailed in [Appendix 2](#).²⁶¹

Settings

10.6.1 Create 2FA integration

Click *Add Integration* and proceed as follows.

Create 2FA integration

Code generation and verification

On the client side

General Information

*Name

Code for Client TM

Under this name you will be able to see the statistics on sending codes in reports.

*Company

Telecom Monsters

*SMS Sender ID

Monster

*Message Text

Verification code is {{code}}

Please note, if the number of characters exceeds 160, including the code, billing will be for 2 messages. The place where the code will be inserted denote {{code}}

Data for integration

*API key

92804fe822cc9fc3a7589325d6c99078:fe7c55daa290d81c29c9be97de80afa2

URL for integration

https://

Cancel

Save as a draft

Save and run the service

Create 2FA integration

1. *Code generation and verification*: select on which side the code will be generated and verified. Possible values include:
 - a. *On the platform side*: the code is generated and verified by the System.
 - b. *On the client side*: the code is generated and verified on the side of the website\service.
2. *Name*: enter the record name.
3. *Company*: enter the name of the Company.
4. *SMS Sender ID*: select the Sender ID that will be used for sending SMS messages with authentication codes.
5. *Message text*: text of the message in which the code is sent. The code placeholder must be specified as {{code}}.
6. *Data for integration: API key*. Click to generate the API key for integration.
7. *Data for integration: URL for integration*. Provide the URL for integration.

Settings

- Click *Save as draft* to save the record in the System, the record will have the status *Draft*. Click *Save and run the service* to make the record operative, the record will have the status *Active*. Click *Cancel* to discard the changes.

NOTE: Once the integration is created, you will be able to run tests.

10.6.2 Edit 2FA integration

To edit a record, click *View* in the table and proceed as follows.

Edit 2FA Integration

ID 3

Code generation and verification

On the platform side

General Information

*Name

Update code

Under this name you will be able to see the statistics on sending codes in reports.

11 / 110

*Company

Demo AY

*SMS Sender ID

sms_http

*Number of digits in the code

Missed option: 4

*Code validity period in seconds (up to 600 seconds)

600

URL, to send the result of verification

*Message Text

Verification code is {{code}}.

Please note, if the number of characters exceeds 160, including the code, billing will be for 2 messages. The place where the code will be inserted denote {{code}}

Data for integration

*API key

c2b6b05dcd1f96c3be23089d3646afab:132ad0ee1c2dbcba4aa1c521cc17d3ab

URL for integration

https://<host>/api/v1/2fa/verify/sms

Testing

*Phone number

Callback delivery status URL

Send test code

1

Cancel

Edit

Edit 2FA integration (1)



Settings

1. Click *Edit* to start editing the record or *Cancel* to close the form.

Edit 2FA Integration ID 3 ×

Code generation and verification

On the platform side

General Information

***Name**

Under this name you will be able to see the statistics on sending codes in reports. 11 / 110

***Company**

***SMS Sender ID**

***Number of digits in the code**

***Code validity period in seconds (up to 600 seconds)**

URL, to send the result of verification

***Message Text**

Please note, if the number of characters exceeds 160, including the code, billing will be for 2 messages. The place where the code will be inserted denote {{code}}

Data for integration

***API key**

URL for integration

Testing

***Phone number**

Callback delivery status URL

Edit 2FA integration (2)

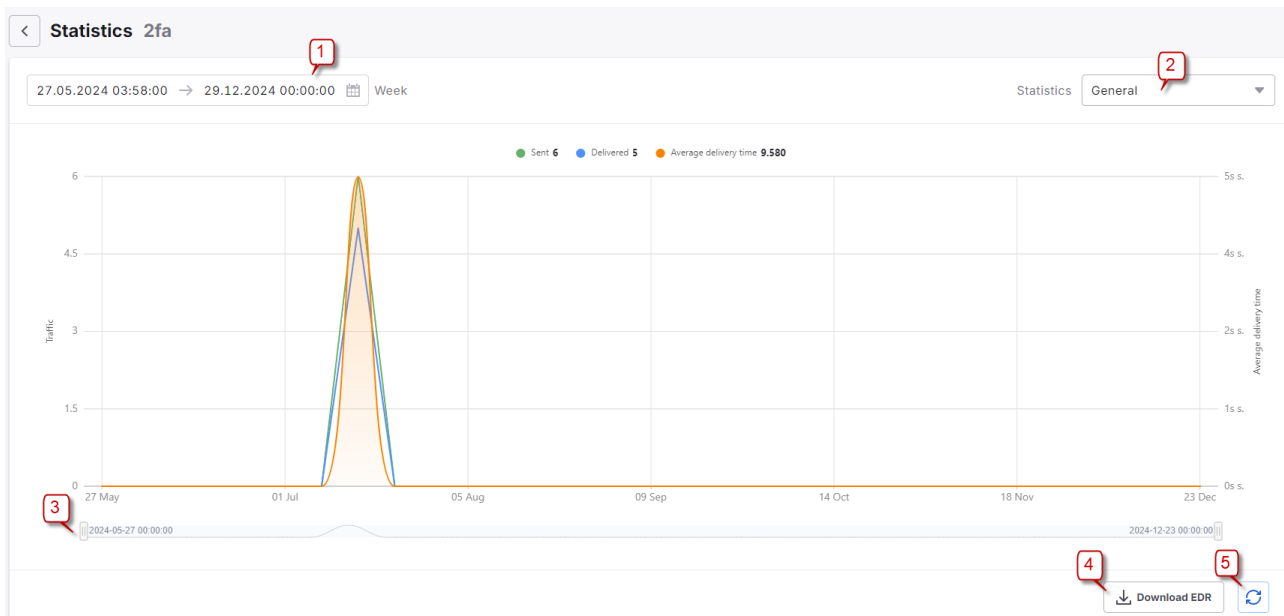
1. Edit the details as appropriate.
2. If the record is in the *Active* status, click *Disable* to block the record. That changes the status in the table to *Blocked*. Click *Delete* to remove the record. Click *Save* to save the changes and close the form or *Cancel* to discard the settings.

Settings

NOTE: If the record was in the *Draft* or *Blocked* status the button is replaced with *Enable*, by clicking it you make the record operative and its status becomes *Active*.

10.6.3 Statistics

Select a record in the table and click *Statistics* to view the statistics on the delivery of two-factor authentication messages for this integration.



Statistics

1. Select the period for which the statistics must be displayed.
2. Select the data that must be shown. Possible values are:
 - a. *General*: sent and delivered messages and the average delivery time.
 - b. *By operator*: sent and delivered messages by operator.
 - c. *By country*: sent and delivered messages by country.
3. Use the slider to zoom in on a shorter timeframe within the period set in step 1.
4. Click *Download EDR* to download the EDR for the specified period.
5. Click  to refresh the chart.

10.7 Own bank accounts

The *Settings\Own bank accounts* interface serves to display System owner's bank accounts. Tenants can view and configure bank accounts for their legal entities that were created independently. Resellers can view and configure bank accounts created independently or assigned by their tenants. The data is used when creating Agreements and can also be used in invoices.

Settings

Own bank accounts			
ID	Name	Legal entity	Parent bank
623	Prague Crystal	Vit	Nordic Capital Partners
622	New account fee	AP Legal entity	Danube International Bank
621	France	Vit	Baltic Commerce Bank
620	Enterprise Global	AP Legal entity	Shanghai Far East Bank
619	B2B Asia Hub	Vit	Seoul Metropolitan Bank
618	Wholesale USA	Vit	Metropol Bank
617	Wholesale Europe	Vit	Southern Cross Bank
616	Enterprise	Vit	Nordic Capital Partners
615	VIP clients	Vit	World Trust
614	Main EUR Account	Vit	Seoul Metropolitan Bank

Own bank accounts

1. Click to filter the records.
2. Click to customize the display of columns.
3. Click to add an own bank account and proceed as described below.

Click *Add own bank account* to add a new own bank account.

Add Own bank account

*Name

VIP clients

*Legal entity

Vit

*Parent bank

World Trust

*Account holder

Dragon Tech Ltd.

*Account number

SA03 8000 0001 2345 6789 1234

Cancel

Save

Add Own bank account

1. *Name*: short name to be displayed in the System interfaces.
2. *Legal entity*: legal entity of the reseller/tenant. Select a legal entity from the drop-down list of legal entities created in the Own legal entity interface.
3. *Parent bank*: the financial institution that maintains the account. Select a bank from the drop-down list of banks created in the [Account management/Banks](#) interface.

NOTE: The drop-down list consisting of banks specified by the tenant is available for resellers.

4. *Account holder*: the beneficiary name (individual or company) as registered in the bank.

Settings

5. *Account number*: unique bank account number.
6. Click to clear a field.
7. Click *Save* to save the profile or *Cancel* to discard the changes.
8. Click to close the form.

Click on a record in the table to view Own bank account.

The screenshot shows a form titled "View Own bank account" with a sub-header "ID 615" and a close button (X) in the top right corner. The form contains several input fields: "Name" (VIP clients), "Legal entity" (Vit), "Parent bank" (World Trust), and "Account holder" (Dragon Tech Ltd). Below these is the "Account number" field (SA03 8000 0001 2345 6789 1234). At the bottom, there are three buttons: "Delete" (red), "Cancel" (blue), and "Edit" (blue). Red numbered callouts are placed over the form: callout 1 is over the "Edit" button, callout 2 is over the "Account number" field, callout 3 is over the "Delete" button, and callout 4 is over the close button (X).

View Own bank account

1. Click *Edit* to start editing a profile.
2. Click *Cancel* to close the form.
3. Click *Delete* to delete a bank profile. Confirm before the record is permanently deleted (see the figure below).
 - a. Click *Delete record* to confirm the deletion.
 - b. Click *Cancel* to cancel the deletion.
4. Click to close the form.

Settings

The screenshot shows a web form titled "Edit Own bank account" with a sub-header "ID 615". The form contains several input fields and buttons, each with a numbered red callout box:

- 1**: Points to the "Name" input field containing "VIP clients".
- 2**: Points to the "Save" button.
- 3**: Points to the "Cancel" button.
- 4**: Points to the "Delete" button.
- 5**: Points to a close button (X) in the top right corner.

Other fields in the form include:

- *Legal entity**: A dropdown menu with "Vit" selected.
- *Parent bank**: A dropdown menu with "World Trust" selected.
- *Account holder**: An input field containing "Dragon Tech Ltd".
- *Account number**: An input field containing "SA03 8000 0001 2345 6789 1234".

Edit Own bank account

1. Edit the information as appropriate.
2. Click *Save* to save the changes and return to the *Own bank accounts* interface.
3. Click *Cancel* to discard the changes.
4. Click *Delete* to delete the record.
5. Click to close the form.

NOTE: If assigned full permissions the *Own bank accounts* interface is available at all levels: for tenants and resellers.

10.8 Payment systems

The *Settings/Payment systems* interface serves to configure payment systems. It displays the list of payment systems that were created at the current reseller or tenant level.

At least one payment system may be assigned to *Own legal entity*. This payment system will be available to the clients for balance top-up in the System. If no payment system is assigned to the tenant/reseller's own legal entity, then client companies working in the System with the legal entity will not be able to top up their balance.

NOTE: At each reselling level in the *Own legal entities* interface, only the payment systems that were created by the user's company can be assigned to legal entities.

The Payment system may charge payment fee when topping up balance. Payment fee can be deducted from Client or from the System owner as pre-configured in the *Deduct payment fee from control*.

In case the payment fee is charged to the Client, the fee is subtracted from the balance of the agreement in the System, i.e. the balance will be less than the amount initially indicated in the System *Balance top-up* window. The amount of this fee is not known in advance, it is specified by the Payment system and is independent of the platform.

In case the payment fee is charged to the System Owner, *Internal system fee* parameter can be set. The internal fee of the System aims to cover the costs of payment processing (Payment system fee), while the Client is informed about the exact amounts: the amount that will be charged to the Client and the amount that will be credited to the balance of the agreement in the System.

Settings

- If the *Internal system fee* field is left empty, the Client will be charged only the amount that will be credited to his balance in the System, and the payment processing fee will be paid by the System Owner.
- If the *Internal system fee* is specified, the Client will be additionally charged a percentage specified in the *Internal system fee* field together with the balance top-up amount while the payment processing fee will be charged to the System Owner.

Payment systems						Columns	+ Add payment system
ID	Name	Type	Status	Updated	Actions		
3	new system 1	PAYONLINE	ACTIVE	29.08.2025 16:20			
4	new system 21	STRIPE	DISABLED	29.08.2025 16:11			
2	PayOnline Default	PAYONLINE	ACTIVE	27.08.2025 23:47			
1	Stripe Default	STRIPE	ACTIVE	27.08.2025 23:47			

Payment systems

1. Click to filter the records.
2. Click to customize the display of columns.
3. Click  to edit or  to delete the record. Proceed as detailed further below.
4. Click to add a payment system and proceed as described below.

Add Payment system



*Payment system name

Payment System1

☒ Enabled

*Payment system type

S Stripe

*Secret key

1234567

*Deduct payment fee from

☒ Client ☐ Owner

Cancel

Save

Add Payment system (Payment system type = Stripe)

1. *Payment system name*: payment system name specified by the user.



Settings

2. *Enabled*: select to enable or disable the payment system. If *Enabled* the payment system status will be *Active*.

NOTE: Enabled payment systems are available for assignment to *Own legal entities* and in the Client portal.

3. *Payment system type*: payment systems available with the System (*Stripe*, *PayOnline*, *FreedomPay*, *NetCommerce*, *WHISH*).

If Payment system type = Stripe:

4. *Secret key*: the secret key provided by Stripe.
5. *Deduct payment fee from*: select if the Payment system fee is charged to the *Client* or the *Owner*. In case the payment fee is deducted from the Owner specify the *Internal system fee* charged to the Client.

NOTE: Internal system fee is specified in percentages from 0.01 to 100.

*Deduct payment fee from

☐ Client ☒ Owner

Internal system fee

3

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

Internal system fee

6. Click *Save* to save the payment system or *Cancel* to discard the changes.

If Payment system type = PayOnline:

Settings

Add Payment system ×

*Payment system name 1

☒ Enabled 2

*Payment system type 3

 PayOnline ▼

*Merchant ID 4

*Private security key 5

*Deduct payment fee from 6

☒ Owner

Internal system fee 7

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

Cancel Save

Add Payment system (Payment system type = PayOnline)

1. *Payment system name*: payment system name specified by the user.
2. *Enabled*: select to enable or disable the payment system. If *Enabled* the payment system status will be *Active*.
3. *Payment system type*: PayOnline.
4. *Merchant ID*: the PayOnline seller ID.
5. *Private security key*: the secret key provided by PayOnline.
6. *Deduct payment fee from*: Owner.
7. *Internal system fee*: payment fee charged to the Client.
8. Click *Save* to save the payment system or *Cancel* to discard the changes.

If Payment system type = FreedomPay:

Settings

Add Payment system ×

*Payment system name 1

Payment System3

☒ Enabled 2

*Payment system type 3

 FreedomPay

*Secret key 4

1234567

*Merchant ID 5

101

*Deduct payment fee from 6

☒ Client ☐ Owner

Cancel Save 7

Add Payment system (Payment system type = FreedomPay)

1. *Payment system name*: payment system name specified by the user.
2. *Enabled*: select to enable or disable the payment system. If *Enabled* the payment system status will be *Active*.
3. *Payment system type*: FreedomPay.
4. *Secret key*: the secret key provided by FreedomPay.
5. *Merchant ID*: the FreedomPay seller ID.
6. *Deduct payment fee from*: select if the Payment system fee is charged to the *Client* or the *Owner*. In case the payment fee is deducted from the Owner specify the *Internal system fee* charged to the Client as detailed above.
7. Click *Save* to save the payment system or *Cancel* to discard the changes.

If Payment system type = NetCommerce:

Settings

Add Payment system ×

*Payment system name 1

2 ☒ Enabled

*Payment system type 3

N NetCommerce ▼

*Secret key 4

*Merchant ID 5

*Deduct payment fee from 6

☒ Owner

Internal system fee 7

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

Cancel Save 8

Add Payment system (Payment system type = NetCommerce)

1. *Payment system name*: payment system name specified by the user.
2. *Enabled*: select to enable or disable the payment system. If *Enabled* the payment system status will be *Active*.
3. *Payment system type*: NetCommerce.
4. *Secret key*: the secret key provided by NetCommerce.
5. *Merchant ID*: the NetCommerce seller ID.
6. *Deduct payment fee from*: Owner.
7. *Internal system fee*: payment fee charged to the Client.
8. Click *Save* to save the payment system or *Cancel* to discard the changes.

If Payment system type = WHISH:

Settings

Add Payment system



*Payment system name 1

Payment system5

☒ Enabled 2

*Payment system type 3

 WHISH

*Channel 4

1111111

*Secret 5

secretkeyprovidedbywhish

*Web site URL 6

www.website.com

*User agent 7

useragent

*Deduct payment fee from 8

☒ Owner

Internal system fee 9

1

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

10

Cancel Save

Add Payment system (Payment system type = WHISH)

1. *Payment system name*: payment system name specified by the user.
2. *Enabled*: select to enable or disable the payment system. If *Enabled* the payment system status will be *Active*.
3. *Payment system type*: *WHISH*.
4. *Channel*: value provided by WHISH.
5. *Secret*: value provided by WHISH.
6. *Website URL*: third party website URL where the API is integrated, the value is provided by WHISH.



Settings

7. *User agent*: identifies the consuming website or application, the value is provided by WHISH.
8. *Deduct payment fee from*: Owner.
9. *Internal system fee*: payment fee charged to the Client.
10. Click *Save* to save the payment system or *Cancel* to discard the changes.

Click on a record in the table to view Payment system.

View Payment system ID 2 4 ×

Payment system name

PayOnline Default

☒ **Enabled**

Payment system type

 PayOnline

Merchant ID

81135

Private security key

54653246-08ea

*Deduct payment fee from

☒ Owner

Internal system fee

1

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

3 Delete

2 Cancel

1 Edit

View Payment system

1. Click *Edit* to start editing a payment system.
2. Click *Cancel* to close the form.
3. Click *Delete* to delete a payment system. Confirm before the record is permanently deleted (see the figure below).
 - a. Click *Delete record* to confirm the deletion.
 - b. Click *Cancel* to cancel the deletion.
4. Click to close the form.

Settings

Edit Payment system

i ID 2

5 X

*Payment system name

PayOnline Default



Enabled

*Payment system type



PayOnline

*Merchant ID

81135

*Private security key

54653246-08ea

*Deduct payment fee from



Owner

Internal system fee

1

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

4

Delete

3

Cancel

2

Save

Edit Payment system

1. Edit the information as appropriate.
2. Click *Save* to save the changes and return to the *Payment systems* interface.
3. Click *Cancel* to discard the changes.
4. Click *Delete* to delete the record.
5. Click to close the form.



Audit

11 Audit

Audit is the activity log of the BackOffice Manager.

Audit			
Date & Time	User	IP Address	Logged Action
15.02.2024 16:21	av-bo1		user up
15.02.2024 16:20	av-bo1		Success
15.02.2024 16:21	av-bo1		user cre
22.02.2024 17:16	backoffice-manager		user up
01.11.2024 12:21	backoffice-manager		Create
01.11.2024 12:20	backoffice-manager		Delete
22.02.2024 17:16	backoffice-manager		user cre
01.11.2024 12:20	backoffice-manager		Create scope item of service (BO) 1 entries
01.11.2024 12:20	backoffice-manager		Create scope item of service (BO) 1 entries
01.11.2024 12:21	backoffice-manager		Create scope item of service (BO) 1 entries
30.05.2024 18:04	backoffice-manager		Updated SMS sender 1 entries

Show all Hide empty Empty only
☒ Update scope item of service (BO)
☐ BO user deleted
☐ BO user updated
☐ BO user created
Apply filter

This event has 1 lines of detail

Table	Operation	Object ID	Old value	New value	Company ID
sender_id	Update	15	{"id": 15, "label": null, "status": 2, "channel": ...}	{"id": 15, "label": null, "status": 2, "channel": ...}	6

Download CSV

Page 1 of 10 Show 100 Rows 1-100 of 902

Audit

- The table contains the following parameters:
 - Date and time.*
 - User.*
 - IP address.*
 - Logged action.*
- Click to add filter.
- Click to apply sorting (descending or ascending).
- Click to customize the display of columns.
- Click on the entry to view the details and download CSV.



Pre-moderation

12 Pre-moderation

The *Pre-moderation* interface serves to view and approve campaigns and chatbots created by the Client portal users. It contains two tabs: *On moderation* that shows records that are pending approval, and *History* that shows approved and rejected records.

NOTE: The approval is only required for campaigns and chatbots created by users that have the *Moderation* checkbox selected in the [Account management\Companies](#) interface. Other campaigns and chatbots are created automatically, with no pre-moderation.

On moderation		History					Columns	
☐ Client	Channel	Type	Name	Object ID	Text Preview	Created		
☐ Demo AY	 	 Campaign	New customer gree...	931	Hi , thanks for purc...	26.12.2023 16:18		
☐ Demo AY		 Campaign		833	hjttest text	26.07.2023 14:53		

Pre-moderation, On moderation tab

Click on a record to approve or block it.

Broadcast Name:
New customer greetings

Client Name:
Demo AY

Created:
26.12.2023 05:15

×

 Template

template



Text

Hi {{attribute.name}} , thanks for shopping with us!

 Block

 Allow

Approve or block a record

Click *Allow* to approve the record, or *Block* to reject it. The record will be moved to the *History* tab.

On moderation		History							Columns	
Client	Channel	Type	Name	Object ...	Text Pr...	Status	Manager	Created		
Demo AY	 	 Campaign	New custome...	932	Hi , thanks fo...	APPROVED	backoffice-mana	26.12.2023 ...		
Demo AY	 	 Campaign	New custome...	931	Hi , thanks fo...	APPROVED	backoffice-mana	26.12.2023 ...		
Demo AY		 Campaign		854	How are you ...	REJECTED	backoffice-mana	25.09.2023 ...		
Demo AY		 Campaign		836	test	REJECTED	backoffice-mana	26.07.2023 ...		

Pre-moderation, History tab

The *History* tab contains the history of requests for approval of broadcasts and chatbots:

1. *Status*: contains the *Approved* or *Rejected* value.

Pre-moderation

2. *Manager*: BackOffice user that approved or rejected the record.
3. *Created*: approval\rejection date.

Portals

13 Portals

The *Portals* interface serves to create and configure the platform portals that the System owner will offer its clients.

The screenshot shows the 'Portals' management interface. It features a table with columns for ID, Company, Name, FQDN, BackOffice URL, Status, Created, Created by, Updated, and Updated by. There are four rows of data, all with a 'DRAFT' status. The interface includes a '+ Add portal' button, a 'Columns' dropdown, and pagination controls at the bottom right.

ID	Company	Name	FQDN	BackOffice...	Status	Created	Created by	Updated	Updated by
76	System owner	shortenerDomain...	123kek.com	123kek.com/bo	DRAFT	21.02.2025 12:11	backoffice-manager	26.02.2025 10:05	
59	System owner	localhost:3000	localhost:3000	localhost:3000/bo	DRAFT	24.01.2025 16:02			
18	System owner	kkkfrom appv	google31v.com	google31v.com/bo	DRAFT	06.10.2023 11:43	backoffice-manager	06.10.2023 11:43	backoffice-manager
15	System owner	kkkfrom appx	google31x.com	google31x.com/bo	DRAFT	06.10.2023 11:06	backoffice-manager	27.03.2024 02:21	backoffice-manager

Portals

The table contains the following information:

1. *ID*: Portal ID.
2. *Company*: name of the company.
3. *Name*: portal name.
4. *FQDN*: domain name.
5. *BackOffice URL*: log link for the portal BackOffice.
6. *Status*: portal status (*Error*, *Draft* or *Active*).
7. *Created*: date and time of creation.
8. *Created by*: user that created the portal.
9. *Updated*: date and time when the portal was updated.
10. *Updated by*: user that updated the portal.
11. Click to customize the display of columns.
12. Click *Add portal* to create a new portal and proceed as follows.

Portals

Add Portal



*Company

1

Hornes and Hooves Reseller Company ▼

*Name

2

Hornes and Hooves Portal

Domain name

! In order for the portal to be accessible via the selected domain name, please register that domain name for the following IP address(es):
Available for premium subscribers only.
You can check if it's properly configured by pressing the *Check* button.

Domain name

3

hornesandhooves-p2.com

Check

? Domain name status will appear here after you set the domain name

Certificate management

! Websites need SSL certificates to keep user data secure, verify ownership of the website, prevent attackers from creating a fake version of the site, and convey trust to users. It makes sense to get to certificate settings only after the domain name is registered.



Certificate is managed automatically

The system will handle certificate management using Let's Encrypt service (after you press the Save button)

4



Certificate is managed manually

You'd need to have full access to the platform infrastructure, or ask your platform provider to do that

? Certificate status will appear here after you Save this portal

Add portal (part 1)

1. *Company*: select the company for which the portal is created.
2. *Name*: enter the portal name.
3. *Domain name*: specify the portal domain name. It must be associated with the IP address specified in the field above (it is the IP address of the Tenant's System). For this, communicate the domain name to the Tenant prior to filling in this form, for the Tenant to make the required associations. Click *Check* to verify that the association is configured properly.
4. *Certificate management*: select the SSL certificate management mode. Possible options include:
 - a. *Certificate is managed automatically*: the system will handle certificate management using the Let's Encrypt service.
 - b. *Certificate is managed manually*: the certificate is managed manually through access to the Tenant's system.



Portals

Add Portal



Branding

Only dark background logos will be used for the Admin portal at the moment

Languages

5

ENGLISH X Select...



Page title

6

HoHo

7

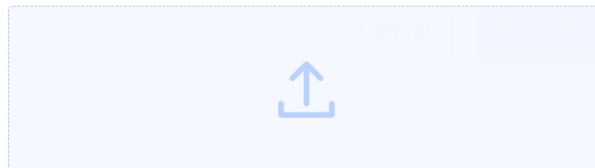
Main menu logo

Square logo (light background)



1:1 ratio recommended

Expanded logo (light background)



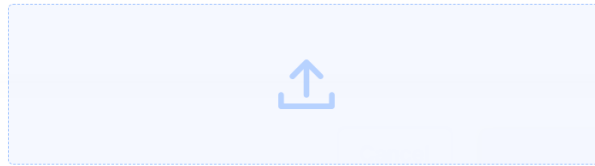
4:1 ratio recommended

Square logo (dark background)



1:1 ratio recommended

Expanded logo (dark background)



4:1 ratio recommended

Logos in vector form (SVG) are recommended, as the image sharpness does not degrade when scaled. With raster file formats (such as JPG, PNG and so on) pixelization or blurring are possible. The best look is achieved when logos have transparent background and no borders

Favicon

8



Vector (SVG) favicon is recommended, but raster (ICO, GIF, JPEG, PNG, BMP) are also supported. The icon ratio must be square.

Owner website

9

+ Add custom website URL

Add portal (part 2)

5. *Languages*: select the language.
6. *Page title*: type the page title.
7. *Main menu logo*: click  to add logos that will be displayed in the main menu, as illustrated in the figure above (square and extended logos with a light and dark background).



Portals

8. *Favicon*: click  to add a favicon (a small square image that represents your website in browsers).
9. *Owner website*: click *Add custom website URL* to add a link to the portal owner's website, which will appear in the *Help* window. Proceed as described below.

Owner website

*Website URL

a

https://www.hoho.hoho

*Website name

b

HoHoHo

6 / 30

Owner website

- a. *Website URL*: specify the website URL.
- b. *Website name*: enter the name of the website that will be displayed in the client's interface.

Portals

Add Portal ×

Login page 10

Login page logo



Recommended ratio is 4:1 or 1:1

English 11

This is the way to do business 12

+ Add translation 13

Login page background



16:9 ratio recommended

☒ Display Branding 15

Add portal (part 3)

10. *Login page logo*: click  to add a logo displayed at the login page.

11. Select a language.

12. Provide a description that will be shown above the login fields.

13. Click *Add translation* to provide the description in more than one language.

14. *Login page background*: click  to add a background picture for the login page.

15. Select the checkbox to display branding.

Portals

Add Portal



Shlink URL shortener domain

hoho.com

☒ Enable Intercom

*Intercom App ID

123

Intercom Secret key ⓘ

11111111

License & Privacy

License agreement

Privacy policy



Support Email ⓘ

abc@horsesandhoooves.com

Cancel

Save as draft

Add portal (part 4)

16. *Shlink URL shortener domain*: specify the individual short domain to be used to change a long link into, thus making it easy to share in a message.
17. *Enable Intercom*: select the checkbox to enable Intercom functionality.
18. *Intercom App ID*: specify Intercom App ID (required).
19. *Intercom Secret key*: type Intercom Secret key providing identity verification that stops anyone impersonating your logged-in users from seeing their conversations (optional).
20. *License and Privacy*: click  to upload License agreement and Privacy policy in pdf.
21. *Support email*: specify the email address that will be displayed in the [Help window](#) ¹² and the user's profile to be used for feedback from partners as well as for notification if a user's self-registration fails.
22. Click *Save* to save the changes or *Cancel* to discard the settings.



Reselling

14 Reselling

14.1 What is reselling

Reselling is a capability to resell the System services that a company buys from its tenant, to other companies. A tenant is an upper-level reseller in relation to its sub-resellers.

The set of services that a reseller can offer its customers is defined by the agreement between the tenant and reseller. The cost of services and pricing models (pay-as-you-go or packs) are defined by the reseller itself. Resellers have their own account in BackOffice to manage the services.

14.2 How to configure reselling

The procedure for creating a reseller is as follows.

The Tenant must do the following:

1. Create a company in [Account management\Companies](#)^[20] and select *Reseller* in the *Type* field:

Add Company

*Company

Hornes and Hooves

☒ Enabled

*Own legal entity

System owner

Description

A very trustworthy company

*Type

Reseller

☒ Creator of resellers

☒ Invoices enabled

☐ MNP Requests

Cancel

Save

Add company, Type = Reseller

2. Assign at least one legal entity to the reseller in [Account management\Legal entities](#)^[25].
3. Create an agreement in [Account management\Agreements](#)^[29].
4. Associate the agreement created in the previous step with the Reseller's legal entity ([Account management\Agreements](#)^[29]). This is the agreement that governs the reselling services.

Reselling

- a. Open the Reseller's legal entity for editing and click *Manage reseller agreements* at the bottom of the page.
- b. In the window that opens, click the 'plus' button , select the agreement and set the effective dates for the association. Click  to save the changes. Multiple agreements can be added by the Tenant for the Reseller.

Reselling agreements for legal entity **Cats and dogs legal entity**



Status	Agreement	Effective from ⓘ	Effective till ⓘ
	1029, EUR ▼	21.11.2023, 00:00:00 	∞ (indefinitely) 
			

Associating legal entity with agreement

5. Assign services and/or packs to the agreement (in [Account management\Agreements\Enabled services](#) ³⁶ or [Account management\Agreements\Enabled packs](#) ³⁸ respectively).
6. Create a BackOffice user for the Reseller company (added at step 1). Assign the user full access permissions. See [Users](#) ¹⁵¹ for instructions on creating a user.
7. Create a System portal for the reseller in [Portals](#) ²⁵⁰. The Reseller can also create a portal in its BackOffice interface, using the credentials assigned at step 6 above.
8. Assign the portal to the Reseller's legal entity. This is done in the Tenant's interface in [Account management\Legal entities](#) ²⁵ interface. In the *Portal* field select the portal created at step 7 as illustrated in the figure below.



Reselling

Edit Legal entity

ID 41768655



*Name

Hornes and Hooves

*Company

AB For reselling

*Legal company name

Hornes and Hooves, Inc.

*Country

Canada

Portal

portal1

portal1

123456

Delete

Cancel

Save

Assigning a portal to the legal entity

9. Create a payment on behalf of the Reseller (using the legal entity and agreement in steps 2 and 3) to top up its balance ([Finance\Payments](#)^[96]).
10. Optional: associate Sender IDs with the Reseller (in [Account management\Sender IDs](#)^[44]). The Reseller can then assign the Sender IDs to its own clients.

After these steps are complete, the reseller will have the following:

1. A BackOffice URL (it is provided to the Reseller by its Tenant; the Reseller is provided an account in the Tenant's BackOffice).
2. Logon credentials for accessing the BackOffice (created at step 6 above).
3. A System URL that the Reseller will give its clients (configured at step 7 above).

The Reseller must log in to BackOffice and do the following:

1. Customize the Portal in the [Portals](#)^[250] interface (this task can also be performed by the Tenant).
2. Configure notification templates for Own legal entity in the [Settings/Notification and Mail Settings/Templates](#)^[212] interface, and delivery channels in the [Settings/Notification and Mail Settings/Notification channels](#)^[221] interface, to send notifications about registrations and system events to the reseller's clients.
3. Check that the Reseller's legal entity is available in [Settings\Own legal entities](#)^[203]. More legal entities can be added if necessary.
4. Create a System account to test the capabilities:



Reselling

- a. Create a company in [Account management\Companies](#) ^[20].
- b. Assign a legal entity to the company in [Account management\Legal entities](#) ^[25].
- c. Associate the agreement created in the previous step with the Reseller's legal entity ([Account management\Agreements](#) ^[29]).
- d. Create a Client portal user for the company ([Users\Client portal](#) ^[159]).
5. Create services in [Finance\Services](#) ^[101].
6. Check that Sender IDs are available in [Account management\Sender IDs](#) ^[44] (if they were added at step 10 above).
7. Create a company for the client ([Account management\Companies](#) ^[20]).
8. Create a legal entity and associate it with the company ([Account management\Legal entities](#) ^[25]).
9. Create an agreement in [Account management\Agreements](#) ^[29].
10. Top up the agreement's balance in [Finance\Payments](#) ^[96].
11. Assign services and/or packs to the agreement (in [Account management\Agreements\Enabled services](#) ^[36] or [Account management\Agreements\Enabled packs](#) ^[38] respectively).
12. Assign sender IDs to the client ([Account management\Sender IDs](#) ^[44]).
13. Create a Client portal user for the client ([Users\Client portal](#) ^[159]).
14. Assign the Sender ID to the client company's agreement ([Account management\Sender IDs](#) ^[44]).

Appendix 1. Password policy

15 Appendix 1. Password policy

To ensure the System security, the following password policy has been implemented in the Client portal and BackOffice interfaces.

1. The minimum password length is 8 symbols.
2. The password must contain at least three of the following groups of symbols: upper-case and lower-case letters, digits and special characters.
3. The current password must not coincide with at least seven previous passwords.
4. The maximum password validity period is 60 days. To change the period, contact your System owner. Once the password has expired, the user is prompted to change it before accessing the System.

NOTE: The user cannot change its own password within 24 hours after changing it. However, a BackOffice user and a Client portal admin can change its own password and the password for a System user at any time.

5. Upon the first login to the System, the user is prompted to change its default password, otherwise the System cannot be accessed.
6. If a System user has not accessed the System for over 180 calendar days, its account is blocked (this does not apply to System admin users). To unblock it, contact your System owner.
7. If a user has been inactive for over 60 minutes, the user is automatically logged out.

NOTE: The password policy parameters can be customized based on the System owner needs and requirements.

Appendix 2. 2FA Messaging API Workflow

16 Appendix 2. 2FA Messaging API Workflow

BackOffice software is expected to utilize two different types of workflow depending on the particular 2FA integration kind used: *on the client side* or *on the platform side*.

16.1 2FA client side integration

This type of integration implies that the System will only be used for premade message sending, OTP code generation and verification is performed by the System user software.

For OTP code message sending use the following pattern:

```
$ curl -X POST <URL for integration field value> -u <API key field value> -d number="<target user DNIS>" -d code="<OTP code>"
```

Successful response format:

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the requestId.

Sample of a response in JSON format:

HTTP/1.1 200 OK

Content-Type: application/json

```
{
  "requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65"
}
```

16.2 2FA platform side integration

This type of integration implies that the System user software works in tandem with the platform where the System user software initiates OTP message sending to the recipient DNIS and verifies OTP code with the platform which generates OTP code and sends it to recipient.

For OTP code message sending use the following pattern:

```
$ curl -X POST <URL for integration field value> -u <API key field value> -d number="<target user DNIS>"
```

Successful response format:

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the requestId.

Sample of a response in JSON format:

HTTP/1.1 200 OK

Content-Type: application/json

```
{
  "requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65"
}
```

After that the System generates OTP code locally and sends it to recipient. Once recipient enters received OTP code in the System user software it will verify it with the System using the query in below format:

Appendix 2. 2FA Messaging API Workflow

```
$ curl -X POST https://<System portal domain name>/api/v1/2fa/verify -u <API key field value> -d  
requestId=<requestId value received at the previous step> -d code=<OTP code user input in System user  
software >
```

Successful response format:

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the number and verifiedAt fields.

Sample of a response in JSON format:

HTTP/1.1 200 OK

Content-Type: application/json

```
{  
  "number": "19602323332",  
  "verifiedAt": 1676444956  
}
```

16.3 Request checking

The System API allows checking OTP requests based on the present requestId value. For that execute a query in below format:

```
$ curl https://<system portal domain name>/api/v1/2fa/requests/<requestId value> -u <API key field value>
```

Successful response format:

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains queried request related array of data.

Sample of a response in JSON format:

```
{  
  "id": "<requestId value>",  
  "number": "<target user DNIS>",  
  "rate": 0.0248,  
  "billable": null,  
  "status": "SUBMIT",  
  "sender": "<integration configured Sender ID>",  
  "goals": ["NUMBER_VERIFIED"],  
  "createdAt": 1676444893067,  
  "payload": {  
    "number": "<target user DNIS>"  
  }  
}
```

Appendix 2. 2FA Messaging API Workflow

16.4 Receiving 2FA integration callbacks

In case URL, to send the result of verification field value is specified during 2FA integration configuration, said URL will receive callbacks containing JSON array in the following format:

```
{  
  "requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65",  
  "number": "19602323332",  
  "status": "SENT",  
  "timestamp": 1656666364  
  "billable": true  
}
```

"timestamp" above indicates the time of a request received by the System for which requestId was generated.

Appendix 3. Getting the access token for your Gupshup App

17 Appendix 3. Getting the access token for your Gupshup App

You can use the access token to get App's templates, submit templates, send messages etc.

1. You will need the Partner token to start using the API. To get the Partner token that will be used as authorization in other Partner APIs make a POST request:

```
curl --request POST \  
  --url https://partner.gupshup.io/partner/account/login \  
  --header 'accept: application/json' \  
  --header 'content-type: application/x-www-form-urlencoded' \  
  --data email=any_email \  
  --data password=any_password
```

where any_email is the email through which the partner has signed up on the partner portal, and any_password is the password set by the partner on the partner portal.

The response you get is as follows:

```
{  
  "token": "{{PARTNER_TOKEN}}",  
  "id": 1**3,  
  "name": "gupshup",  
  "terms_read": true,  
  "admin": true,  
  "email": "peter.parker@zylker.com",  
  "activationRead": false,  
  "billingType": "PREPAID",  
  "contactName": "peter",  
  "phoneNumber": "898",  
  "enableCustomer": false,  
  "enableWallet": true,  
  "enableInrWallet": false,  
  "enableLoaderWallet": false,  
  "enableAppOnboarding": true,  
  "isTpp": false,  
  "onboardEnabled": false  
}
```

Use the value "token", that is, the result for the example is "{{PARTNER_TOKEN}}". Currently, the token lifetime is 24 hours.

2. Make a GET request to obtain the access token:

Appendix 3. Getting the access token for your Gupshup App

```
curl --request GET \
  --url https://partner.gupshup.io/partner/app/{your_appid}/token \
  --header 'accept: application/json' \
  --header 'token: your_24_token'
```

where {your_appid} is replaced with a valid App Id from the account, and your_24_token is taken from the result of the previous request.

The response will be as follows:

```
{
  "status": "success",
  "token": {
    "token": "sk_20c901e*****2a592484*****1",
    "authoriserId": "aac***e8-d**c-****-a93f-***d6d5a***e8",
    "requestorId": "4**2",
    "createdOn": 1705905891100,
    "modifiedOn": 1705905891100,
    "expiresOn": 0,
    "active": true
  }
}
```

3. The value "token": "token": is a permanent token that needs to be added to the provider configurations. In this case it will be sk_20c901e*****2a592484*****1.

Appendix 4. Integration with Zendesk

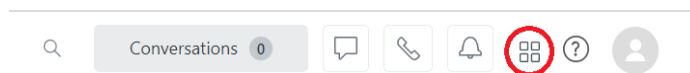
18 Appendix 4. Integration with Zendesk

1. To create a Zendesk integration, register an account with Zendesk using the following [registration link](#). Complete the below 8 steps:

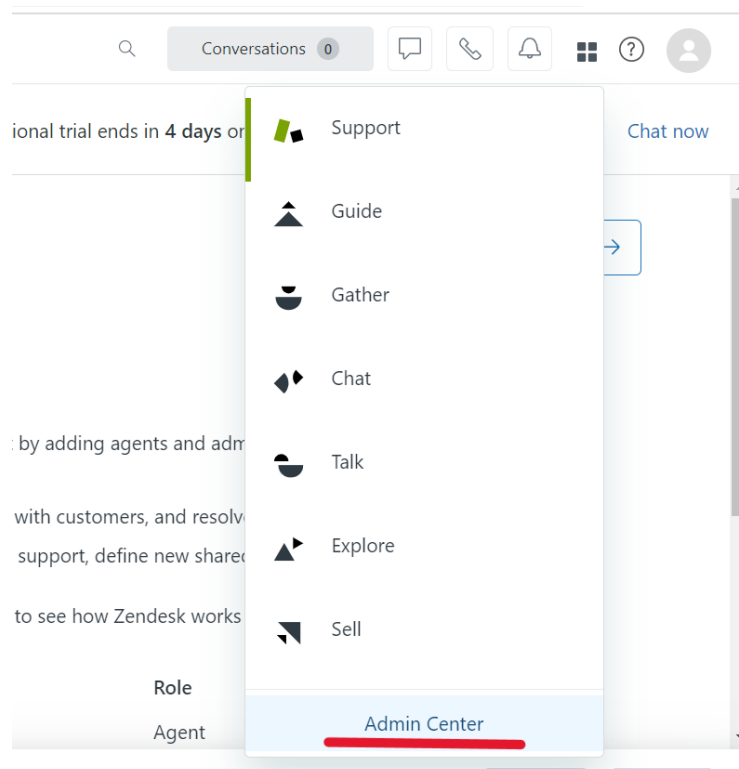
- Specify your work email.
- Specify your first name.
- Specify your last name.
- Specify your phone number.
- Specify the name of the company you work for.
- Specify the number of employees in your company.
- Select the interface language.
- Create a password.

2. Create a webhook and trigger to send a message for status updates by following the steps below:

Step 1. On the Zendesk home page, click on the four squares icon (the one that is highlighted with a red circle in the figure below).

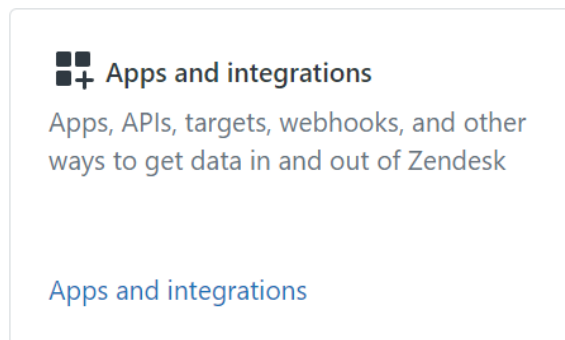


Step 2. Go to the Admin Center by clicking on the Admin Center button (underlined in red in the figure below).

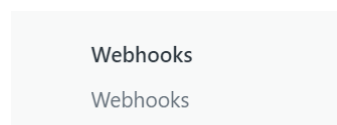


Appendix 4. Integration with Zendesk

Step 3. Once on the Admin Center page, go to Apps and integrations.



Step 4. Proceed to the Webhooks section.



Step 5. On the Webhooks page, click Create webhook to create a webhook.

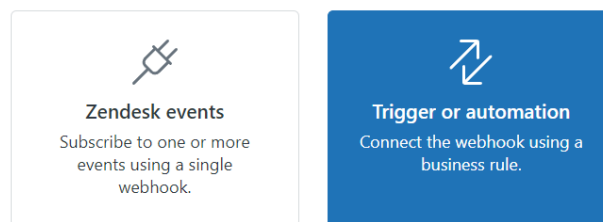
Create webhook

Step 6. Select Trigger or automation for the connection type.

Create webhook

Select your connection method and add details to create your webhook.

1 Select a way to connect



Step 7. Specify the name and description of the webhook, as well as the link to the System API endpoint:

`https://your-host/api/v1/crm/zendesk/ticket/change_status`

Appendix 4. Integration with Zendesk

2 Add details

Name* (Required)

Description

Endpoint URL*

The endpoint you want to pass data to. [Learn about endpoint URL](#)

Step 8. Fill in the fields by selecting the POST for Request method, JSON for Request format, API key for Authentication, Authorization for Header name, and paste the API key for your integration (created in the API Accesses interface of the Client portal) into the Value field (see the figure below).

Request method*

Request format*

Authentication*

☒ None
☒ API key
☐ Basic authentication
☐ Bearer token

Header name* ⓘ

Value* ⓘ

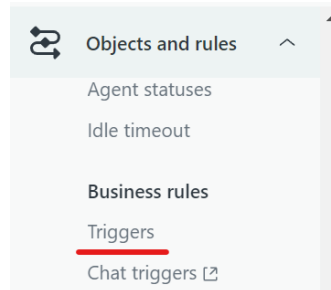
Only if you want to change the current value

Step 9. Save the webhook by tapping on the button specified in the picture below.

Create webhook

Step 10. After creating the webhook, go to the Triggers page by selecting the corresponding tab of the Objects and rules section.

Appendix 4. Integration with Zendesk



Step 11. Once there, initialize the creation of the trigger by clicking on the Add trigger button.



Step 12. On the Add Trigger page, fill in the fields as detailed in the figure below.

Trigger name
change ticket status

Description
Send new ticket status to

Category
Notifications

Step 13. In the Meet ANY of the following conditions section, select the parameters as detailed below.

Meet ANY of the following conditions

Ticket Is Updated

Add condition

Step 14. In the Actions section, enter the following, and for Notify active webhook, select the webhook you created earlier.

Appendix 4. Integration with Zendesk

Actions

Actions that will occur if global conditions are satisfied

Notify active webhook

add support comment

Endpoint

https://

Description

Send support comment to end user

Method

POST

JSON body

```

1 {
2   "new_status": "{{ticket.status}}",
3   "requester_number": "{{ticket.requester.phone}}",
4   "sender_id": " ",
5   "partner_id": 5
6 }

```

```

{
  "new_status": "{{ticket.status}}",
  "requester_number": "{{ticket.requester.phone}}",
  "sender_id": "1111111111", // your sender
  "partner_id": 5 // your brand id (Company_id)
}

```

Step 15. Create the trigger by tapping the Create button.

Create

3. To create a webhook and trigger to send an operator's comment to the System follow' the steps below:

Step 1. To create this webhook and trigger, repeat steps 1–6 from the previous section (3) of the guidelines.

Step 2. Fill in the fields as detailed in the figure below.

Add details

Name* (Required)

Send comment

Description

Send operator comment

Endpoint URL*

The endpoint you want to pass data to. [Learn about endpoint URL](#)

https://

Endpoint URL link:

Appendix 4. Integration with Zendesk

`https://your-host/api/v1/crm/zendesk/ticket/send_comment`

Step 3. Fill in the fields by selecting the POST for Request method, JSON for Request format, API key for Authentication, Authorization for Header name, and paste the API key for your integration.

Request format*

JSON

Authentication*

☒ API key

☐ Basic authentication

☐ Bearer token

Header name* ⓘ

Authorization

Value* ⓘ

Only if you want to change the current value

Step 4. Finally, save the webhook by clicking the button shown in the figure below.

Create webhook

Step 5. Repeat steps 10–11 from the previous section (3) of the document.

Step 6. On the trigger creation page fill in the fields as specified in the figure below.

Trigger name

Send operator comment

Description

Send operator comment

Category

Notifications

Step 7. In the section Meet ANY of the following conditions select the following parameters:

Meet ANY of the following conditions

Comment

Is

Public

Step 8. In the Actions section type in the following, and webhook select the webhook created earlier for Notify active webhook.

```
{
  "comment": "{{ticket.latest_comment_html}}",
```

Appendix 4. Integration with Zendesk

```

"requester_number": "{{ticket.requester.phone}}",
"sender_id": "1111111111", // your sender
"partner_id": 5 // your brand ID
}

```

Actions

Actions that will occur if global conditions are satisfied

Notify active webhook

Send comment

Endpoint

https://

Description

Send operator comment to

Method

POST

JSON body

```

1 {
2   "comment": "{{ticket.latest_comment_html}}",
3   "requester_number": "{{ticket.requester.phone}}",
4   "sender_id": "",
5   "partner_id": 5
6 }

```

Step 9. Create the trigger by tapping the Create button.

4. To create a user proceed as detailed below:

Step 1. To add a user, go to the Customers page and click the Add customer button.

The screenshot shows the Zendesk 'Customers' page. At the top, there's a header with 'Ticket #4' and a '+ Add' button. Below the header, the 'Customers' section is visible, with a description: 'Add, search, and manage your customers (end users) all in one place.' There's a search bar labeled 'Search customers' and a table with one customer listed. The table has columns: Name, Email, Tags, Timezone, and Last updated. The customer listed is 'The Customer' with email 'customer@example.com'. There's also an 'Add customer' button in the top right corner.

Step 2. Fill out the form that appears (the Email does not have to be real) and click the Add button.

Appendix 4. Integration with Zendesk

Add new customer

×

Name

Alex Smith

Email

alex@abc.com

Cancel

Add

Step 3. On the page of the created user, set User type to Staff member.

User type

End user

End user

Staff member

Access

End user

Staff member

Primary email

alex@abc.com

+ add contact

Tags

-

Org.

-

Language

English (United States)

Time zone

-

Details

-

Notes

-

Created

Aug 01 23:43

Updated

less than a minute ago

Alex Smith

+ New Ticket

▼

Tickets (3)

Related

Security Settings

Ticket status	ID	Subject	Requester	Requested	Updated	Group
No tickets in this view						

Step 4 . Add the user's phone number that have been used to contact the Support and create a ticket.

User type

End user

Access

Can view and edit own tick...

Primary email

alex@abc.com

▼

⚠

Phone

+ 12345678999

+ add contact

- To assign a user in the ticket requester on the page of the required ticket, in the Requester field find the user by name and select them.

Appendix 4. Integration with Zendesk

The screenshot shows the Zendesk ticket interface for 'Ticket #4'. The ticket is currently 'Open'. The 'Requester' is 'Alex'. The 'Assignee*' is 'Support'. The 'Followers' field is empty. The 'Tags' field is empty. The 'Type' and 'Priority' are both set to '-'. The 'Ticket' details show it was created 'Via API' and assigned to 'AI' on 'Thursday 16:30'. The 'Comment by' field is empty. The 'Public reply' dropdown is set to 'Public reply'. The 'To' field is set to 'Alex'. The 'CC' field is empty. The 'Apply macro' dropdown is set to 'Apply macro'. The 'Stay on ticket' dropdown is set to 'Stay on ticket'. The 'Submit as Open' button is visible.

6. To add users to the ticket followers on the page of the required ticket, in the Followers field find users by name and select them.

The screenshot shows the 'Followers' field in the Zendesk ticket interface. The 'Requester' is 'Alex'. The 'Assignee*' is 'Support/'. The 'Followers' field is highlighted with a red box and contains 'Alex Smith'. The 'Tags' field is empty. The 'Type' and 'Priority' are both set to '-'. The 'Follow' button is visible.

7. To comment on the ticket click the Submit as <current ticket status> button.

The screenshot shows the 'Submit as Pending' button in the Zendesk ticket interface. The 'Stay on ticket' dropdown is set to 'Stay on ticket'. The 'Submit as Pending' button is visible.

8. To change the ticket status choose a new ticket status, click the arrow to the right of the button Submit as <current ticket status>, and select the appropriate status.

The screenshot shows the 'Submit as Pending' button in the Zendesk ticket interface. The 'Stay on ticket' dropdown is set to 'Stay on ticket'. The 'Submit as Pending' button has a dropdown arrow to its right.

Appendix 5. Financial module

19 Appendix 5. Financial module

This section describes the operating principle of the financial module.

19.1 Terms and definitions

- *Billing period*: a fixed period of time (day, week, month, quarter) during which the consumption of services is recorded and invoices are issued to the client, determining when charges start adding up and when payment becomes due.
- *Charge*: a part of an invoice that may contain one or more charges. A charge is a list of provided services and the total amount.
- *Invoice*: a payment demand that is issued by a tenant to their client company. It is generated based on the charges included in it.
- *Credit note*: a reverse invoice for payment. This is an invoice, but with a negative amount. A credit note is generated, for example, when EDRs have been recalculated and the original invoice contained an amount higher than the actual amount due.
- *Payment*: created by the System Owner or reseller by generating a single payment or by making a payment through supported payment systems in the Client portal (when topping up the agreement balance).

19.2 How it works

The System Owner, resellers and client companies interact basing on the agreement. The agreement defines the terms that apply when the tenant provides services to their client company. Each agreement corresponds to a separate balance, maintained in a specific currency. The balance stores actual money and, if negative, reflects the client's accounting debt to the tenant. Sub-balances in the form of packages can also be associated to the contract.

Most of the parameters defined in the agreement are used by the System in its work-flow, for example, in financial settlements.

Changes in the agreement balance are reflected directly as resources are consumed.

The financial module generates charges and invoices based on service usage and balance changes. Charges and invoices are managed in the BackOffice [Invoices and charges](#) interface.

The volume of used services is calculated within the billing period specified in the agreement. At the end of the billing period, the invoice is reviewed and confirmed by the tenant to be forwarded to the client company.

Once confirmed, the invoice is considered final and any adjustments are made only through corrections.

19.3 Charges

Charge is a record of a certain type of service represented in the System as a set of resources, for a certain billing period, in a certain volume and at a certain cost, generating a debt in the amount of the cost of the service rendered to a client. The charge amount is displayed in the currency of the agreement that has this amount charged to its balance. The System generates separate charges for each resource.

At the moment, the System works only with client charges (Charge direction - *Receivable*).

Charges can be created in two ways:

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- *Automatically.* These charges are only generated by the System. They contain information on traffic processed during the billing period or information on fees charged to the client, such as the Sender ID setup fee.
- *Manually.* Users can manually create charges for additional services not linked to any specific service. These charges are created in the [Additional Fees](#)  interface.

Charges can have one of the following statuses:

- *Draft:* the charge is not confirmed and is available for recalculation.
- *Confirmed:* the charge is confirmed. Recalculation of this charge can not be performed.

19.3.1 Detalization

Charges have detalization rows containing detailed information about the service rendered. The structure of the detalization rows depends on the resource of a particular service type.

Rows are grouped into a single charge based on the following criteria:

- Contract;
- Balance (sub-balance);
- Direction;

NOTE: Currently the System only supports *Receivable* charges.

- Billing period;
- Resource;
- Service type.

The charge amount is calculated as the sum of all rows included in the charge breakdown. The charge amount can be either positive or negative. Typically, charges with a negative amount are generated by the System as a result of corrections.

19.3.2 Charge life cycle

Charges are created based on resource consumption events. If the client has not consumed any resources during the billing period, no charges or invoices will be generated.

Charges may be recalculated as new data is received providing that the invoice containing them is not confirmed. Once the invoice is confirmed, all new service consumption information is recorded as part of the correction charge.

19.3.2.1 Correction charge

Correction charge is created upon receipt of new data on the service rendered if the invoice that includes the charge for this service is confirmed.

A correction charge is created as a new version of the previous charge for the amount of the difference between the charges. This charge can also be recalculated provided that the invoice containing it is not confirmed. Once it is confirmed, the second charge cannot be recalculated; when new data is received, the System will create another correction charge to the second charge, and so on.

Each correction charge is included in the invoice. If there is no suitable unconfirmed invoice to include a correction charge when it is created, the System creates a new invoice to include the correction charge.

A charge is considered confirmed if the invoice it is included into is confirmed.

Appendix 5. Financial module

19.3.2.2 Charge recalculation

Charge recalculation can be initiated:

- *Manually* from the [Invoices and charges](#)  interface. The recalculation button is only displayed for charges included in unconfirmed invoices.
- *Automatically* upon receipt of new service data or when recalculating an invoice that includes this charge.

When new data on a service is received, the System checks whether the invoice that includes the charge for that service has been confirmed. If the invoice has been confirmed, a correction charge is created for that charge. If the invoice has not been confirmed, the System initiates a recalculation of the charge.

When recalculating charges, the System checks whether there is a difference between the new detalization and the current charge detalization:

1. If there is no difference between the detalizations, the System updates the date of the last charge recalculation without changing the data in its detalization.
2. If there is a difference, the System performs the following actions:
 - a. Makes the necessary changes to the charge detalization;
 - b. Updates the charge amount based on the sum of all rows included in its detalization;

NOTE: If the charge is a correction, the System will subtract the amount of the detalization of the previous charge version from the resulting amount of the new detalization.

- c. Updates the last charge recalculation date;
- d. Updates the invoice that includes the charge.

19.4 Invoices

Invoice is a financial document that consolidates charges and records the total amount of services rendered. It reflects the total amount of charges for a billing period and is used to reconcile and confirm payments to clients. The invoice amount is displayed in the currency of the agreement that it is issued for.

Currently, the System only processes client invoices (invoice direction - *Receivable*).

Invoices are generated automatically at the start of a billing period or when the System detects a charge or correction.

Invoices can have one of the following statuses:

- *Draft*: the invoice is not confirmed and is available for recalculation.
- *Confirmed*: the invoice is confirmed. Recalculation of this invoice can not be preformed.

19.4.1 Invoice types

Invoices come in two types: *invoice* and *credit note*. The invoice type depends on the sign of its total, calculated as the sum of all its charges. If the total is positive, it's a standard invoice; if it's negative, it's a credit note.

19.4.2 Detalization

Invoice detalization is a list of all charges included into it.

All charges generated within a single billing period for a single agreement are grouped into a single invoice until it is confirmed.

Appendix 5. Financial module

The invoice amount is calculated as the sum of all rows included in the invoice detalization, that is, the sum of all charges. The invoice amount can be either positive or negative, which is relevant for the type of the issued invoice.

19.4.3 Invoice life cycle

An invoice is generated upon receipt of information regarding the services provided to the client. If the client has not consumed any resources during the billing period, no charges will be incurred and no invoice will be generated. An invoice may be recalculated until it is confirmed.

An invoice may be issued to the client (confirmed) at any time. Once confirmed, if there are any correction charges, the System will generate an additional invoice.

19.4.3.1 Invoice update

An invoice is updated automatically after one of the charges included in the invoice is recalculated.

Updating an invoice means updating the invoice amount without directly recalculating all of its charges.

19.4.3.2 Invoice recalculation

Invoice recalculation can be initiated:

- *Manually* from the [Invoices and charges](#)  interface.
- *Automatically* upon initialization of invoice confirmation or if the System detects changes to the data on the service after recalculating EDRs for the agreemen that this invoice is issued for.

Invoice recalculation, both manual and automatic, is only available for unconfirmed invoices.

When new data is received regarding the provision of a service included in a confirmed invoice, the System creates a new invoice, which includes all necessary charges and corrections.

When recalculating an unconfirmed invoice, the System performs the following actions:

1. Successively recalculates all charges included in this invoice;
2. Updates the invoice amount;
3. Updates the date of the last invoice recalculation.

19.4.3.3 Invoice confirmation

After the billing period ends, the invoice is reviewed by the current reseller. If any discrepancies are found, the reseller contacts the tenant to resolve the issues.

If no discrepancies are found, the invoice is confirmed manually by the BackOffice user.

When initializing an invoice confirmation, the System performs the following actions:

- Initializes invoice recalculation;
- Sets the *Payment status* in the invoice to *Expected*;
- Sets the *Covered Amount* in the invoice to "0";
- Sets the invoice *Status* to *Confirmed*;
- Displays the invoice in the client company's interface.

19.4.3.4 Making changes in invoices after confirmation

When the input data for the same period has changed (traffic has been re-rated, the tax amount has been changed, etc.) after an invoice for a certain period has been confirmed, a mechanism for generating

Appendix 5. Financial module

correction charges has been implemented. These corrections are included in a separate invoice.

19.4.3.5 Cancelling invoice confirmation

Cancellation of confirmation is only available for confirmed invoices. If you attempt to cancel an invoice confirmation when there are correction charges that refer to the charges on this invoice, and these correction charges relate to the confirmed invoice, the operation will fail.

When an invoice is successfully unconfirmed, the following changes occur:

- The status of all charges included in the invoice is changed to *Draft*;
- The invoice status is changed to *Draft*;
- The payment status, covered due, outstanding due, confirmation time, and the confirming user are reset.

19.5 Payments

System admin can work with payments in the BackOffice *Finance\Payments*, and the System owner's clients can work with payments in the Client portal *Finance\Finance* interface.

The Client portal *Finance\Finance* interface displays all payments from the client company that affect their balance (confirmed and unconfirmed, meaning those whose confirmation deadline has not yet passed). Balance top up is performed by the client making a payment through the interface via supported payment platforms. Each time you top up successfully, the payment is created automatically.

The BackOffice *Finance\Payments* interface lists all payments to/by the System owner's clients, both confirmed and unconfirmed. Admins (BackOffice users) can manually register payments in the System by creating individual payments. They can also delete and edit existing payments, confirm payments, and cancel confirmations that have already been made.

19.5.1 Payment status

Payments have two statuses:

- *Confirmed*;
- *Not confirmed*.

The *Not Confirmed* status of the payment can be obtained by manually creating a payment without checking the *Payment confirmed* checkbox, or by revoking confirmation from an already confirmed payment. An unconfirmed payment (the one that has a *Not Confirmed* status) requires setting a *Confirm payment before* date. Until this date, the payment is displayed in the balance of the corresponding agreement. If the payment has not been manually confirmed by the BO user before this date, the payment is cancelled, meaning it ceases to affect the agreement balance, as if the payment had never existed (this is important in cases where the client has already topped up the balance, but the payment has not yet been credited to the System owner's account - the payment is immediately displayed in the client's balance to avoid traffic restrictions if the balance reaches zero or the credit limit). An unconfirmed payment with expired confirmation deadline remains registered in the System but no longer affects the agreement balance. These payments are still available for confirmation by checking the relevant checkbox; in this case, it will again affect the agreement balance immediately after confirmation.

A payment has the *Confirmed* status if it is confirmed. This status indicates that the payment has been executed and has already been credited to the System owner's bank account. The *Confirmed* status can be obtained by confirming a payment with the *Not Confirmed* status (the status will change from *Not Confirmed* to *Confirmed*) or by manually creating a confirmed payment with the *Payment confirmed* checkbox selected (the payment will be generated with the *Confirmed* status). Automatically created payments (generated when

Appendix 5. Financial module

topping up the balance in the Client portal) are created with the *Confirmed* status by default. A confirmed payment begins to affect the contract balance immediately after it is confirmed (or after this payment is created) and will continue to affect the balance until the confirmation is removed or the payment is deleted from the System.

NOTE: The *Confirm payment before date* can not be earlier than or equal to the *Payment date*. For example, if the selected *Payment date* is "August 22, 2024," then only dates starting from "August 23, 2024" are available in the *Confirm payment before control*.

19.5.2 Creating a payment

19.5.2.1 Manual payments

Manual payments are created in the BackOffice *Finance\Payments* interface using the *Add payment* form, which opens when you click the *New payment* button.

You can manually create payments with two statuses: *Confirmed* and *Not Confirmed*.

Confirmed payments affect the contract balance immediately after they have been created, and will continue to have a permanent effect on the balance until the confirmation is removed or the payment is removed from the System.

Not confirmed payments affect the contract balance immediately after they have been created and until the *Confirm payment before date* occurs. Confirmation can be performed for not confirmed payments with expired confirmation deadline as well as for those payments with the last confirmation date that has not yet expired.

When creating a payment in a currency different from the agreement currency, specify the amount in the currency other than the agreement currency and the date when the selected exchange rate was effective. The exchange rate is calculated automatically. After saving the payment, the agreement balance will be updated by the amount specified in the *Replenishment amount* control in the agreement currency.

19.5.2.2 Automatic payments

Automatic payments are created after the balance has been topped up with the help of the top-up form in the Client portal *Finance\Finance* interface by clicking the *Top up balance* button. These payments have the *Confirmed* status by default.

The user specifies the agreement to be topped up, the payment platform, and the top-up amount in the balance top-up form. The agreement currency is automatically selected as the top-up currency.

When the user clicks the form button that confirms the balance top-up, the System redirects them to a URL of the selected payment platform that contains all the parameters the System requires to complete the payment. This URL can be obtained from the payment platform used or generated by the System.

The user follows a URL on the payment platform's website and makes a payment by card or other available payment method. Upon successful payment, the payment platform notifies the callback URL of the payment, after which the confirmed payment is automatically registered in the System, and the balance of the agreement specified in the payment is topped up with correspondingly. After payment is completed, the user is redirected back to the Client portal.

NOTE: When creating a new payment or editing an existing one, checks are performed to ensure that payments are created/edited in accordance with the current payment logic.

NOTE: Payment uniqueness is verified using the *Company - Reference code* set of attributes. Payment reference code is unique for a selected company. In case the payment with the specified reference code is

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found for the selected company, the following error notification is displayed: "The payment with this code already exists for the selected company".

NOTE: When creating a payment or changing its parameters, the System verifies that the selected agreement has an active version on the *Payment date* and the *Confirm payment before date*, meaning the corresponding dates fall within the validity period of the selected agreement version. If no active version of the selected agreement is found, the following error notification is displayed: "The actual agreement version could not be found for the selected payment date and payment confirmation deadline".

19.5.3 Deleting a payment

Deleting payments is only available in the BackOffice *Finance\Payments* interface. The user clicks the *Delete* button in the *View payment* form, which opens when they click on the row in the Payments table.

When deleting a payment, a check is made to determine whether the selected payment affects the agreement balance at the time of deletion:

- If the selected payment affects the balance (typical for *Not confirmed* payments with *Confirm payment before date* that have not yet passed, as well as for *Confirmed* payments), the payment is deleted from the System, and the amount of this payment becomes void as regards the agreement balance. For example, when voiding an inbound payment (payment from the client to the System owner), the payment amount is subtracted from the balance of the corresponding agreement, and when voiding an outbound payment (payment from the System owner to the client), the corresponding amount is added to the balance;
- If the selected payment no longer affects the balance (typical for *Non confirmed* payments with the expired *Confirm payment before date*, the payment is deleted from the System without being voided regarding the agreement balance.

19.5.4 Editing a payment

Editing payment parameters is only available in the BackOffice *Finance\Payments* interface available in the BackOffice interface. Editing mode is accessed by clicking the *Edit* button in the *View payment* form, which opens when you click the row in the Payments table.

Some payment parameters are not editable and are only specified when the payment is being created. These parameters include the following:

- *Company* that the payment is associated with;
- *Agreement* with the selected company, which has the balance that the payment refers to;
- *Direction* of the payment;
- *Exchange rate*. This parameter becomes available at the attempt to register in the Payment System using a currency different from the agreement currency.

Other payment parameters are editable.

Confirming a payment and/or calling off the confirmation of an already confirmed payment is performed as part of editing payment parameters, since these operations are controlled by the *Payment confirmed* checkbox, which can be changed in the *Edit* mode.

19.5.5 Confirming a payment

Payment can be confirmed in the *Edit* mode in the BackOffice *Finance\Payments* interface. Confirmation is required if the payment was created after the payment had been executed and had already been credited to the System owner's bank account. In this case, a confirmed payment should be created immediately. Confirmation is also required if the client made the payment, but the bank transaction was still being

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processed at the time the payment was created, and the funds were expected to be credited later. In this case, the payment should be confirmed in the System after the System owner sees the funds in their account.

Payment confirmation is performed in the *Add/Edit payment* window by selecting the *Payment confirmed* checkbox when creating a payment or editing an unconfirmed payment, respectively. When a payment is confirmed, its status is set to *Confirmed*, and the client receives a payment confirmation notification to the email address specified in the *Payment alert emails* field of the active agreement version.

When confirming a payment, a check is performed to determine whether the selected payment affects the agreement balance at the time of confirmation:

If the selected payment affects the balance (typical for unconfirmed payments with the *Confirm payment before* date that has not yet expired), the amount of this payment is not charged/debited from the agreement balance again.

If the selected payment does not yet affect the balance (the payment is currently being created, and it is created as *Confirmed*) or no longer affects the balance (typical for *Non confirmed* payments with an expired *Confirm payment before*), then the amount of this payment is debited/written off from the balance at the time the payment is confirmed.

A confirmed payment has a lasting impact on the agreement balance as long as the payment remains registered in the System (until it is deleted) or until the confirmation is removed. Once a payment is confirmed, its confirmation deadline (*Confirm payment before*) no longer affects the payment's impact on the agreement balance.

19.5.6 Calling off payment confirmation

The confirmation of an already confirmed payment can be called off in the BackOffice *Finance\Payments* interface. This functionality becomes instrumental if a payment was confirmed by mistake.

To call off the confirmation uncheck the *Payment confirmed* checkbox in the *Edit payment* window. As the control with the latest payment confirmation date (*Confirm payment before*) is displayed set the date accordingly. After the confirmation has been called off the payment status changes from *Confirmed* to *Not Confirmed*.

Calling off a payment confirmation may change the logic behind its impact on the agreement balance depending on the specified confirmation deadline. When saving changes, the following checks are performed:

- If the *Confirm payment before* date is earlier than or equals to* the current date (the date when the confirmation of the payment is being called off), the payment status is set to *Not Confirmed* and the payment is voided relative to the agreement balance. For example, when canceling an inbound payment (a payment from a client to the System owner), the payment amount is subtracted from the corresponding agreement balance. When canceling an outbound payment (a payment from the System owner to a client), the corresponding amount is added to the balance;
- If the *Confirm payment before* date is set after the current date, the payment status is set to *Not Confirmed* and the payment remains on the agreement balance (not deducted or refunded) until the payment confirmation deadline. Subsequently, cancellation of the payment is carried out according to the existing logic for processing unconfirmed payments with a specified confirmation deadline.