

BackOffice

BackOffice User's Guide

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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.

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.

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 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.

3 Typical System workflow


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

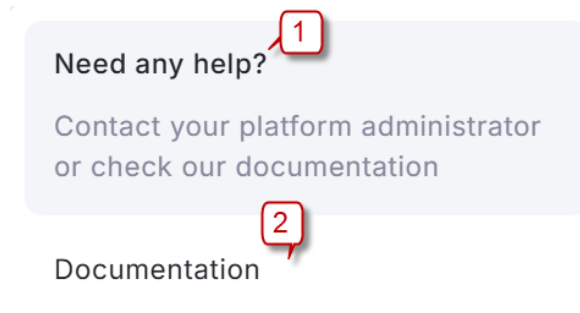
1. Create a legal entity for your company in [Settings\Own legal entities](#) ¹⁸³.
2. Create a company for your client in [Account management\Companies](#) ¹⁸.
3. Create a legal entity for the client's company in [Account management\Legal entities](#) ²³.
4. Create an agreement for the client in [Account management\Agreements](#) ²⁶.
5. Create a service in [Finance\Services](#) ⁹³.
6. Assign the service to the agreement (use [Account management\Enabled services](#) ³¹ for pay-as-you-go rate plans and [Account management\Enabled packs](#) ³³ 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](#) ¹²⁶.

7. Create and activate a Sender ID in [Account management\Sender IDs](#) ³⁹.
8. Associate the Sender ID with the agreement in [Account management\Sender IDs](#) ³⁹.
9. Create users for BackOffice (for your team), and a user for the Client portal in [Users](#) ¹⁴². The Client portal user will then be able to create its own users in the Client portal.

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.




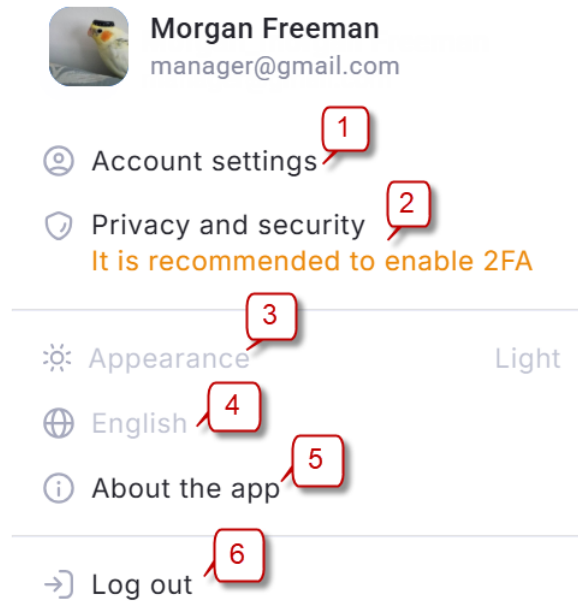
The Help window

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

1. *Need any help?* prompt. The upper-level partner's technical support mail address is displayed if *Support Email* field in the [Portals](#)²⁰⁹ interface is filled in. If the *Support Email* field is not filled in, 'Contact your platform administrator or check our documentation' text is displayed.
2. *Documentation*: click to access the user documentation.

5 My account

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



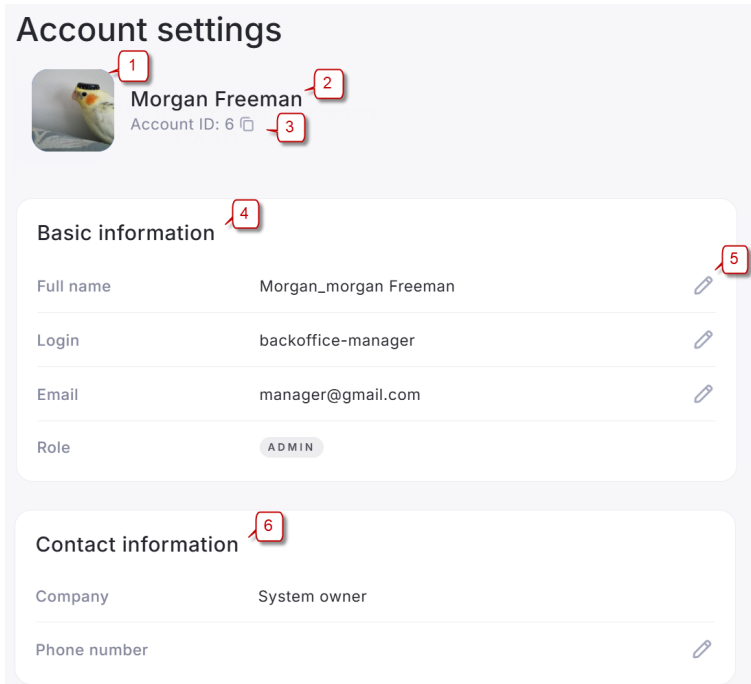
My account

It consists of:

1. *Account settings*: click to proceed to the [Account settings](#)¹³ interface.
2. *Privacy and Security*: click to proceed to the [Privacy and Security](#)¹⁴ 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.

5.1 Account settings

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



Account settings

1 Morgan Freeman 2
Account ID: 6 3

Basic information 4

Full name	Morgan_morgan Freeman	5
Login	backoffice-manager	
Email	manager@gmail.com	
Role	ADMIN	

Contact information 6

Company	System owner	
Phone number		

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*:
 - o *Full name*: user's first and last name.
 - o *Login*: user's login.
 - o *Email*: user's email.
 - o *Role*: roles assigned to the user.
5. Click to start editing info in the form that appears:

Edit name

*First name

 13 / 60 a

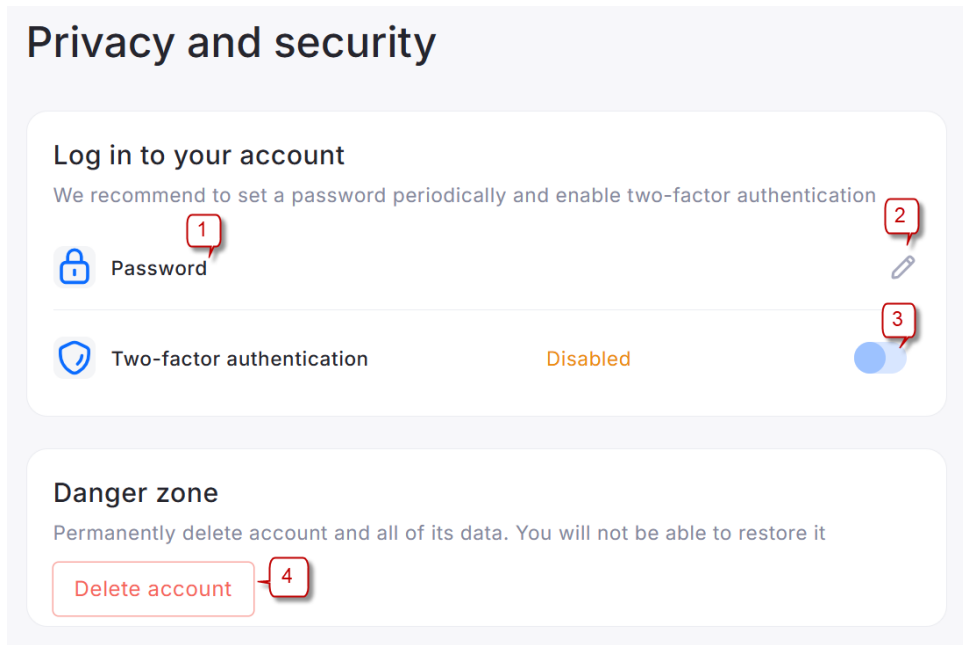
*Last name

 7 / 60 b**Edit form**

- a. Edit the data as appropriate.
 - b. Click *Save* to save the settings or *Cancel* to discard the changes.
6. Contact information:
- o *Company*: company the user is associated with.
 - o *Phone number*: user's contact number.

5.2 Privacy and Security

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



Privacy and security

Log in to your account

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

1 Password 2

3 Two-factor authentication **Disabled**

Danger zone

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

4 Delete account

Privacy and Security

The interface consists of the following elements:

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

Change password



Current password

a

New password

b

Generate

Confirm password

d

e

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.
 - 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

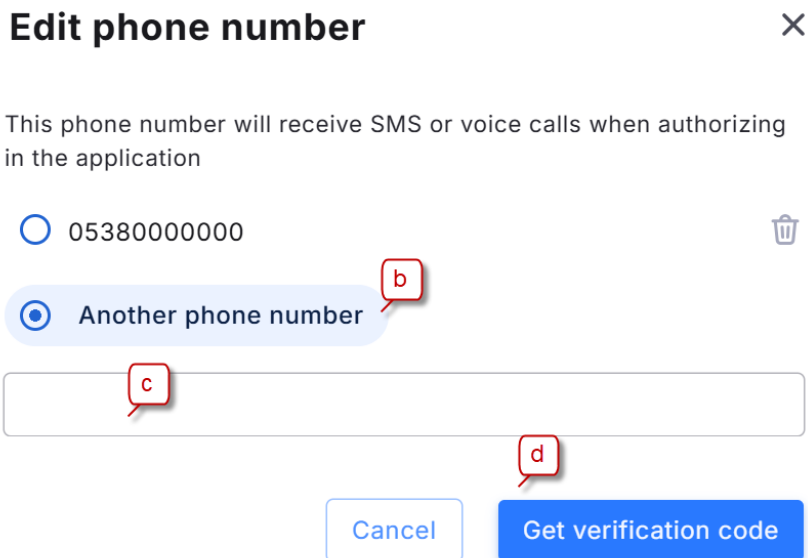
8 / 15

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

- 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.

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.

Delete your account?



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

Delete account

Cancel

Delete your account (2)

6 Account management

6.1 Companies

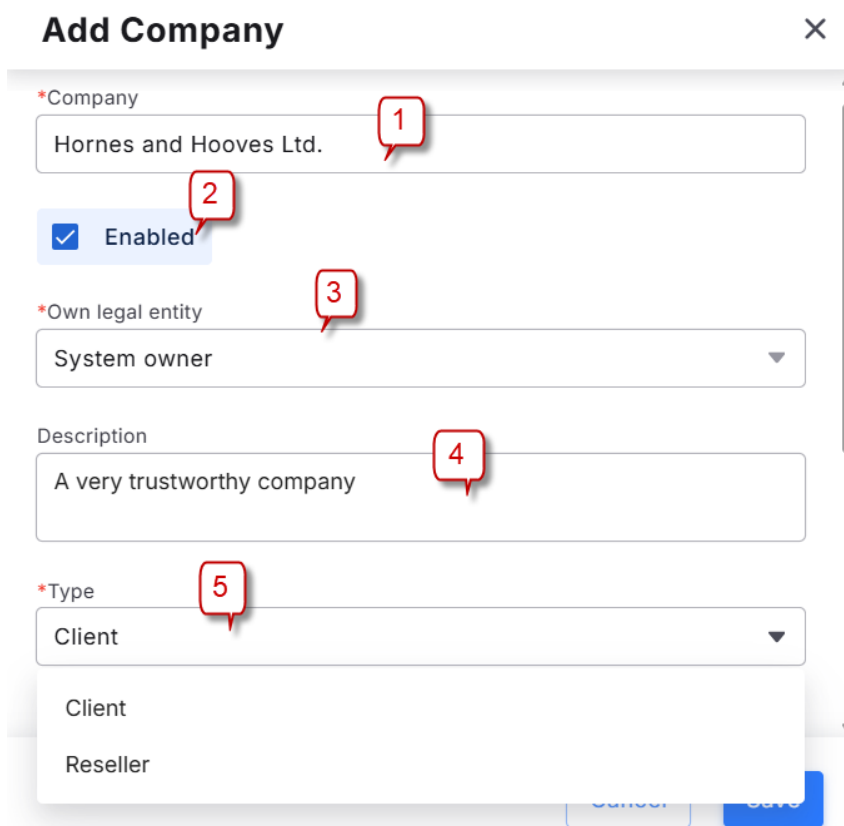
Companies are clients of the System Owner that use the platform for communicating with their customer base through conversations and broadcasts. The *Account management/Companies* interface is illustrated in the figure below.



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 1

Enabled 2

*Own legal entity 3

Description 4

*Type 5

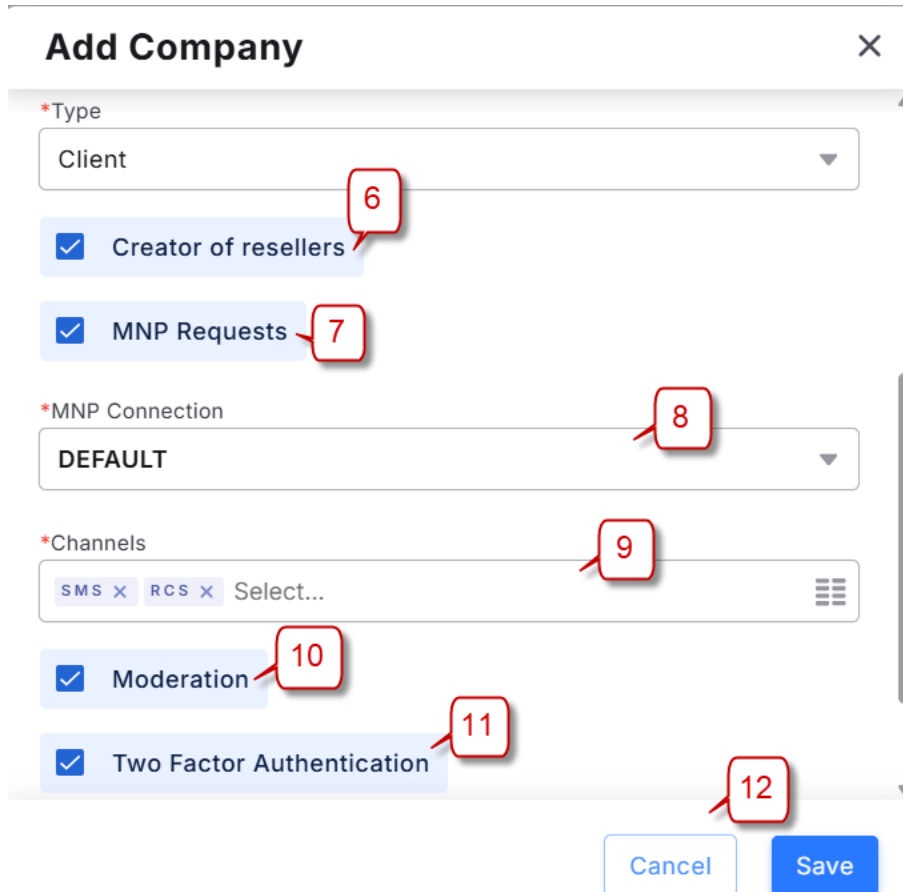
Client
Reseller

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.
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](#)^[214] for more detail.



Add Company [X]

*Type
 Client [6]

Creator of resellers [6]

MNP Requests [7]

*MNP Connection
 DEFAULT [8]

*Channels
 SMS X RCS X Select... [9]

Moderation [10]

Two Factor Authentication [11]

[12] [Cancel] [Save]

Add Company (2)

6. *Creator of resellers*: select the checkbox to allow the company to create other companies with the *reseller* status.
7. *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.

8. *MNP connection*: select the MNP connection that will be used to send an MNP request. MNP connections are created in the MNP Connections interface.
9. *Channels*: the channels that MNP dipping will be applied to. The drop-down list contains all available channels and supports multiple channel selection.
10. *Moderation*: when selected, the chatbots and campaigns created by the company's users are sent to the System owner for moderation (see [Pre-moderation](#)^[207] 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.


11. *Two Factor Authentication*: select to require two-factor authentication for all users of the company.

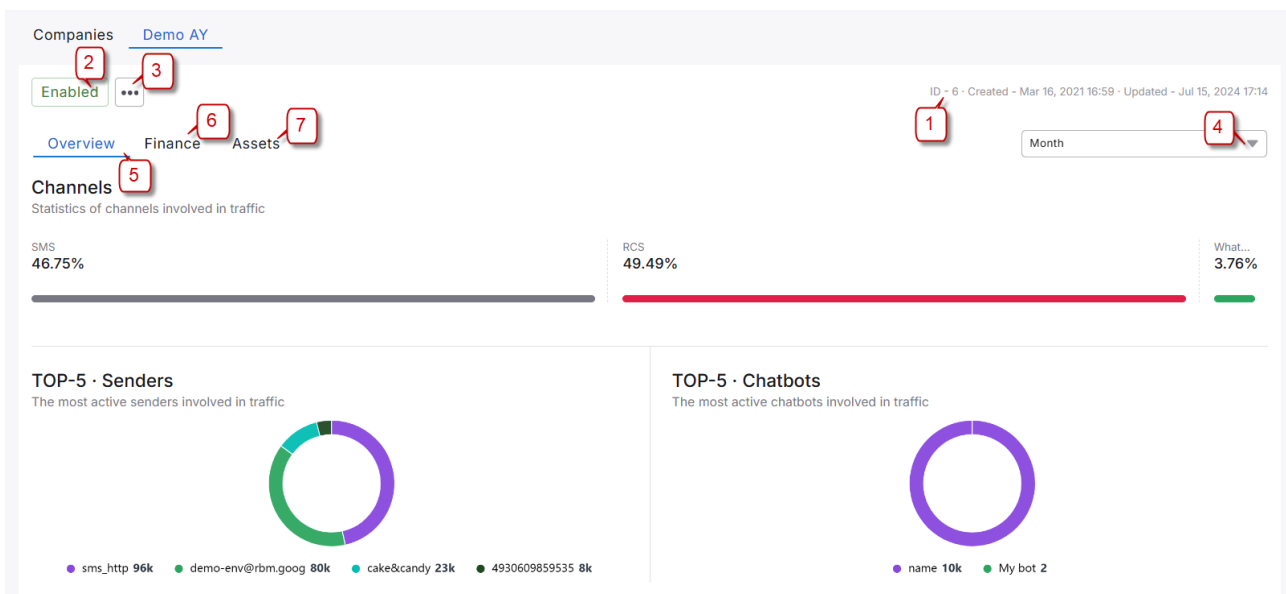
NOTE: A valid phone number must be specified in the user profile. Users having no such phone number not be able to access the System.

NOTE: If the *Two Factor Authentication* checkbox is disabled, the option can be enabled for individual users in [Users](#) ¹⁴².

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

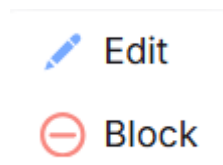
6.1.1 Company profile

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



Edit/Block control

4. Select the period to display the company statistics: *Day*, *Month* or *Year*.
5. *Overview* tab: the company overview, that contains statistics on the channels involved in the company traffic, the most active senders and chatbots.

6. *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 Demo AY

Enabled ⋮ ID - 6 · Created - Mar 16, 2021 16:59 · Updated - Jul 15, 2024 17:14

Overview Finance Assets Legal entity: Acc_For_NN

emul_Agreement Details ↗

452 928.48 EUR **Unlimited**
Balance Credit limit

Starts 21 Sep 2023 ∞ (indefinitely)

ACC_FOR_NN

-19 906.67 EUR **Unlimited**
Balance Credit limit

Starts 31 Oct 2021 Ends 30 Dec 2025

Finance operations
Financial operations related to this company

Invoices Payments

Direction	Reference #	Total due	Currency	Status
↓ RECEIVABLE		7 132.00	EUR	DRAFT
↓ RECEIVABLE		16 675.00	EUR	DRAFT

Services
Services connected to this company

Service	Effective from	Effective till
WhatsApp default	25.12.2024 11:30	∞
WhatsApp CBP default	25.12.2024 11:30	∞

Finance tab

7. *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.

Companies Demo AY


Enabled ⋮ ID - 6 · Created - Mar 16, 2021 18:59 · Updated - Jul 15, 2024 17:14

Overview Finance Assets

Templates Content Conversation Whats App

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

Pizza Restaurant - New Pizza (WhatsApp)



New pizza that will change the world

This time we've come up with something truly special.

I want a slice!

Assets tab

Click *Edit* (3) to edit the company profile.

View Company ID 6 1 ×

Company
Demo AY

Enabled

Own legal entity
System owner

Description

*Type
Client

4 3 2

Delete Cancel Edit

Editing a company profile (1)

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.

Edit Company ID 6 ×

*Company 1

Enabled

Own legal entity

Description

*Type

of resellers 2

Delete 3 Cancel Save

Editing a company profile (2)

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](#) ¹⁸³.

ID	Name	Company	Count... 1	Portal	Legal address	Billing addre...	Legal comp...	Tax ID numb...	Legal ID nu...	VAT ID num...	Is Default 3
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	hr 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.

Add Legal entity 13 X

*Name 1
Hornes and Hooves

*Company 2
AB For reselling

*Legal company name 3
Hornes and Hooves, Inc

*Country 4
Canada

Portal 5
portal1

Tax ID number 6
1234567

Legal ID number 7
654321

VAT ID number 8
7777777

Legal address 9
77 Barn str. NowHere

Billing address 10
77 Barn str. NowHere

Is Default 11

12 Cancel Save

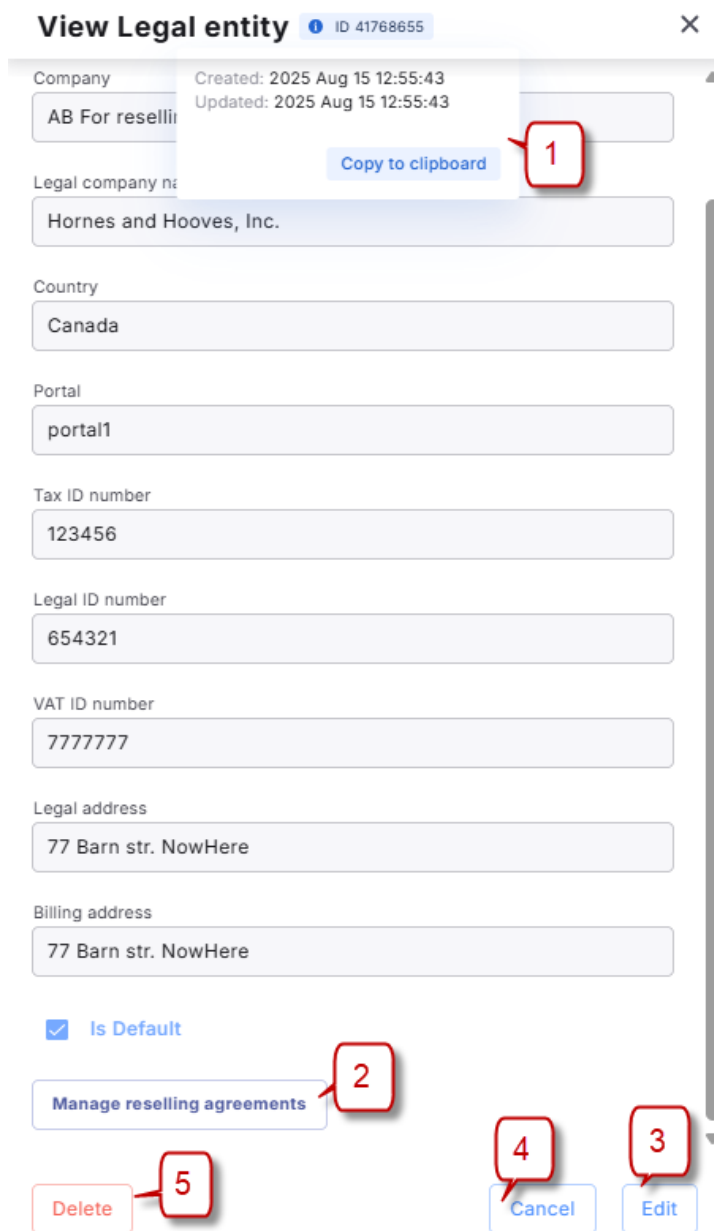
Adding legal entity

Configure the following fields:

1. *Name*: legal entity name.
2. *Company*: the company name in the System.
3. *Legal company name*.
4. *Country*: country of registration.
5. *Portal* (optional: it is created for a [reseller company](#)^[214] legal entity): select a portal created in [Portals](#)^[209]. 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*: the official registered address of a company or legal entity, as recorded in government registries.
10. *Billing address*: the address associated with a company's financial transactions. May differ from the legal address.
11. *Is default*: default legal entity is selected by default in all legal entity entry forms.
12. Click *Save* to save the record or *Cancel* to discard the settings.
13. Click to close the form.

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



The screenshot shows a 'View Legal entity' modal window for ID 41768655. It contains several input fields and buttons. Red callout boxes with numbers 1 through 5 point to specific elements: 1 points to the 'Copy to clipboard' button; 2 points to the 'Manage reselling agreements' button; 3 points to the 'Edit' button; 4 points to the 'Cancel' button; and 5 points to the 'Delete' button.

View Legal entity ID 41768655

Company: AB For resellin
Created: 2025 Aug 15 12:55:43
Updated: 2025 Aug 15 12:55:43

Legal company name: Hornes and Hooves, Inc.

Country: Canada

Portal: portal1

Tax ID number: 123456

Legal ID number: 654321

VAT ID number: 777777

Legal address: 77 Barn str. NowHere

Billing address: 77 Barn str. NowHere

Is Default

Buttons: Manage reselling agreements, Delete, Cancel, Edit

Viewing a legal entity profile

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



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](#).^[214]
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).




Agreements														  		
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	esap	esap	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	6666	18.01.2024	CLIENT	EUR	18.01.2024	=	5	Africa/Abidjan	Monthly	services 2	No packs enabled
50	Homes and H...	Recaller for Hom...	System owner	UNKNOWN-47	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	20.09.2023	=	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](#) ^[31] page).
3. View the number of enabled packs (click the link to open the [Account management\Enabled packs](#) ^[33] page).
4. Click *New agreement* to add a new agreement.

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	06.06.2023 
*Currency 9	
EUR	
*Effective from 10	Europe/Zagreb
06.06.2023 	
*Effective till 11	Europe/Zagreb
∞ (indefinitely) 	

Cancel Save

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

Add Agreement ×

Credit limit 12

Invoicing 13

*Billing timezone 13 *Days for payment

*Billing period 14 *Billing day 15
 Split by month

Emails 16

Invoice emails

Account emails

Rate change emails

Service emails

Payment alert emails

17

Add agreement (2)

12. *Credit limit*: specify the allowed credit limit. If left blank, the credit limit is unlimited.
13. *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.
14. *Billing period*: *Billing day*: specify the billing period (*Daily*, *Weekly*, *Monthly* or *Quarterly*) and the day on which the invoice must be issued.
15. *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).
16. *Emails*: specify emails for various types of notifications. The following fields are available in this section:
 - a. *Invoice emails*: the address for sending invoices.
 - b. *Account emails*: the address for sending account notifications - for example, on account registration and activation.

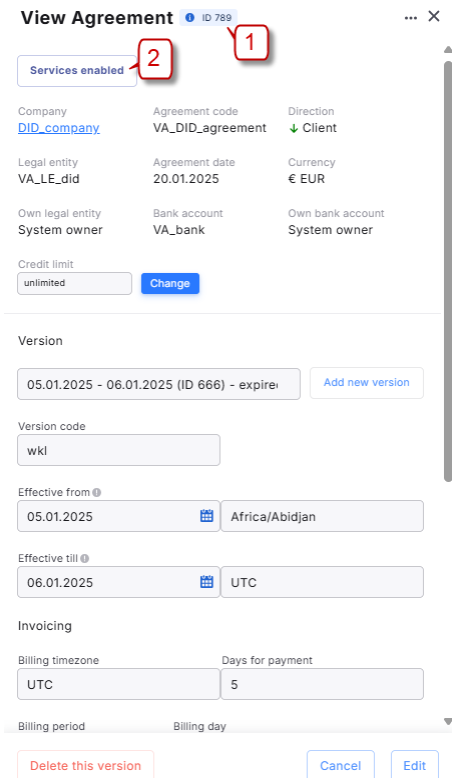
NOTE: Notifications that inform clients about problems with sending or a complete lack of traffic are sent to the address(es) specified in the *Account emails* field.

- c. *Rate change emails*: the address for sending rate change notifications.
- d. *Service emails*: the address for sending technical notifications.
- e. *Payment alert emails*: the address(es) for payment alerts.

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

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 789

Services enabled

Company: [DID_company](#) Agreement code: VA_DID_agreement Direction: Client
 Legal entity: VA_LE_did Agreement date: 20.01.2025 Currency: € EUR
 Own legal entity: System owner Bank account: VA_bank Own bank account: System owner

Credit limit: unlimited [Change](#)

Version: 05.01.2025 - 06.01.2025 (ID 666) - expire [Add new version](#)

Version code: wkl

Effective from: 05.01.2025 Africa/Abidjan
 Effective till: 06.01.2025 UTC

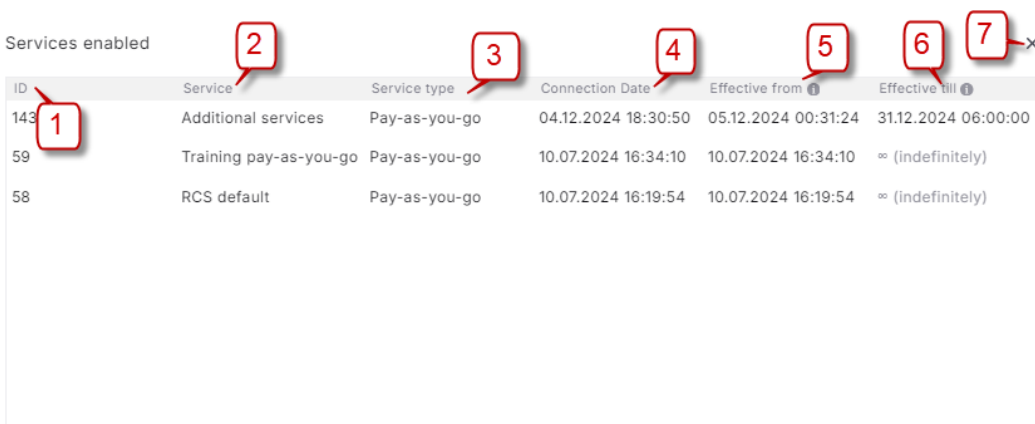
Invoicing: Billing timezone: UTC Days for payment: 5

Billing period: Billing day

[Delete this 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.



ID	Service	Service type	Connection Date	Effective from	Effective till
143	Additional services	Pay-as-you-go	04.12.2024 18:30:50	05.12.2024 00:31:24	31.12.2024 06:00:00
59	Training pay-as-you-go	Pay-as-you-go	10.07.2024 16:34:10	10.07.2024 16:34:10	∞ (indefinitely)
58	RCS default	Pay-as-you-go	10.07.2024 16:19:54	10.07.2024 16:19:54	∞ (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.

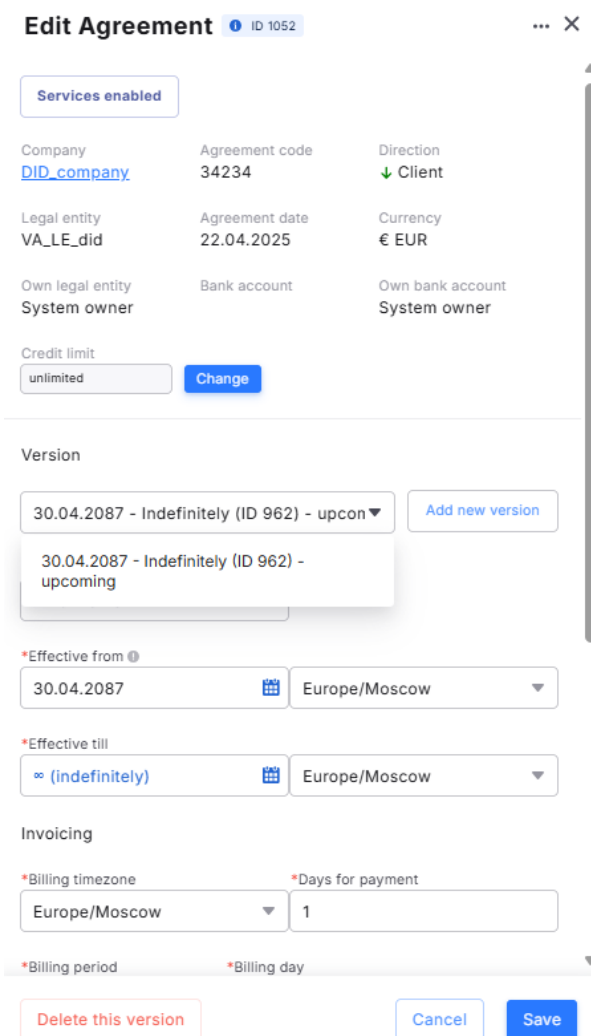
NOTE: Some Agreement fields are not editable.

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*.

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.



The screenshot shows the 'Edit Agreement' interface for ID 1052. It includes sections for 'Services enabled', 'Company', 'Legal entity', 'Own legal entity', 'Credit limit', 'Version', 'Effective from', 'Effective till', 'Invoicing', and 'Billing period'. A dropdown menu is open under the 'Version' section, showing two options: '30.04.2087 - Indefinitely (ID 962) - upon' and '30.04.2087 - Indefinitely (ID 962) - upcoming'. The 'Add new version' button is also visible.

Select a version

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

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](#)) 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](#)) to an agreement.

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	ACC_FOR_NN (EUR)	Additional	18.12.2024 10:51	=
145	Demo AY	ACC_FOR_NN (EUR)	Telegram	18.12.2024 10:26	=
144	Hornes and Hooves Ltd	1234 (EUR)	Additional services	04.12.2024 18:39	=
143	Telecom Monsters	NC-12345 (EUR)	Additional services	05.12.2024 00:31	31.12.2024 08:00
59	Telecom Monsters	NC-12345 (EUR)	Training pay-as-you-go	10.07.2024 18:34	=
58	Telecom Monsters	NC-12345 (EUR)	RCS default	10.07.2024 18:19	=
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 1

*Agreement 2

*Effective from 3 Timezone

Effective till 4 Timezone

Do not show to client 5

6

Add Enabled services

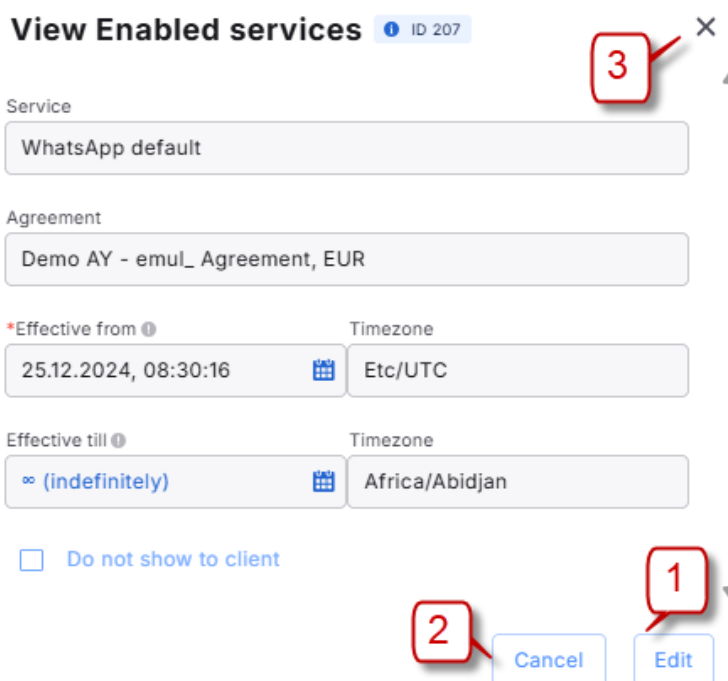
1. *Service*: select the service.
2. *Agreement*: select the agreement with which the service must be associated.

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

View Enabled services

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

Edit Enabled services ID 207

***Service**
WhatsApp default 3

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

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

Effective till Timezone
∞ (indefinitely) Africa/Abidjan

Do not show to client 1

Cancel Save 2

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.

ID	Agreement	Service	Company	Cost	Currency	Effective from	Effective till
42	1234 (EUR)	1 EUR on Messages - Welcome Bonus	Hornes 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	Hornes and Hooves Ltd			08.11.2023 13:20	-
50	4321 (EUR)	Pack for reseller 100 000	Hornes 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.

Add Enabled pack ✕

*Service (pack) 1

*Agreement 2

*Effective from 3 Timezone

Effective till 4 Timezone

*Billing 5
 Free of charge
 Charge

6

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](#)^[31] and associated to the agreement. For detailed instructions on creating a billable pack, refer to [Finance\Services\Example 4. Creating a pack](#)^[126]. 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](#)^[94]) 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.

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

2 1

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

1 2

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.be used first.

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](#)⁽⁹³⁾) to an agreement.

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	DID_company	VA_DID_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
1296	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_789	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)** 1

Bundle initiator LA

***Agreement** 2

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

***Effective from** 3

13.07.2025, 00:00:00

Effective till 4

∞ (indefinitely)

Do not show to client 5

Cancel Save 6

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 pack 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.

View Enabled bundle initiator ID 1379

3

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

2 Cancel **1** 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

3

*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**

Cancel Save

Edit Enabled bundle initiator

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.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	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_regactf_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		28.01.2025 16:48	29.01.2025 03:00
1310	VA_regactf_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		29.01.2025 03:00	30.01.2025 03:00
1311	VA_regactf_3	VA-2024-10-16-125786268 (EUR)	VA_bundle_pack_10		30.01.2025 03:00	31.01.2025 03:00
1312	VA_regactf_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

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

Add Enabled bundle pack

*Service (pack) 1

6266_bundle pack

*Agreement 2

VA_company - VA_chan_bil_TZ, EUR 3

Cancel
Save

Add Enabled bundle pack

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

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

View Enabled bundle pack ID 1306 ✕

Service (pack)

Agreement

Auto extend

View Enabled bundle pack

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 malfunctions (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](#) ¹⁶².
2. All the required configurations have been made on the side of the service provider that supplies Sender IDs.

Sender IDs											Columns	+ New sender
ID	Company	Channel	Sender ID	Name	Status	Webhoo...	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 or Mobile Push) and click *Apply*.

New sender x

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

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 Columns + 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	Sender ID fees
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](#) ⁹⁴ for more detail).

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

X

+ Add

*Effective from: 28.03.2024

Effective till: ∞ (indefinitely)

Period properties

Charge every: month week

Start day: 1

Charge, day(s) beforehand: 1

On failure

Retry every hour(s): 1

Max retries: 3

Sender ID properties

Sender ID type: Alphanumeric Short code Long code

MNO: BT X

500.00 EUR
Effective: 01.01.2000 03:00:00

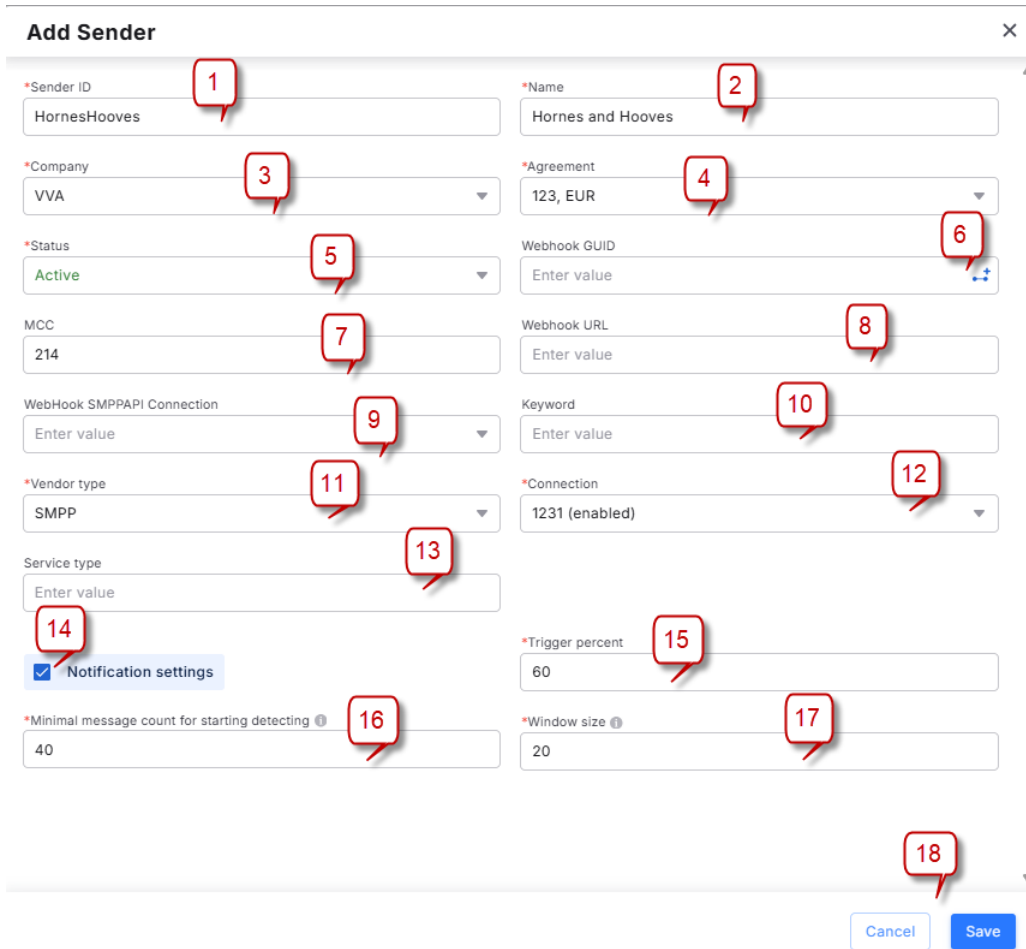
Cancel Save

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](#)). 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.

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

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.

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](#)^[162].
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:

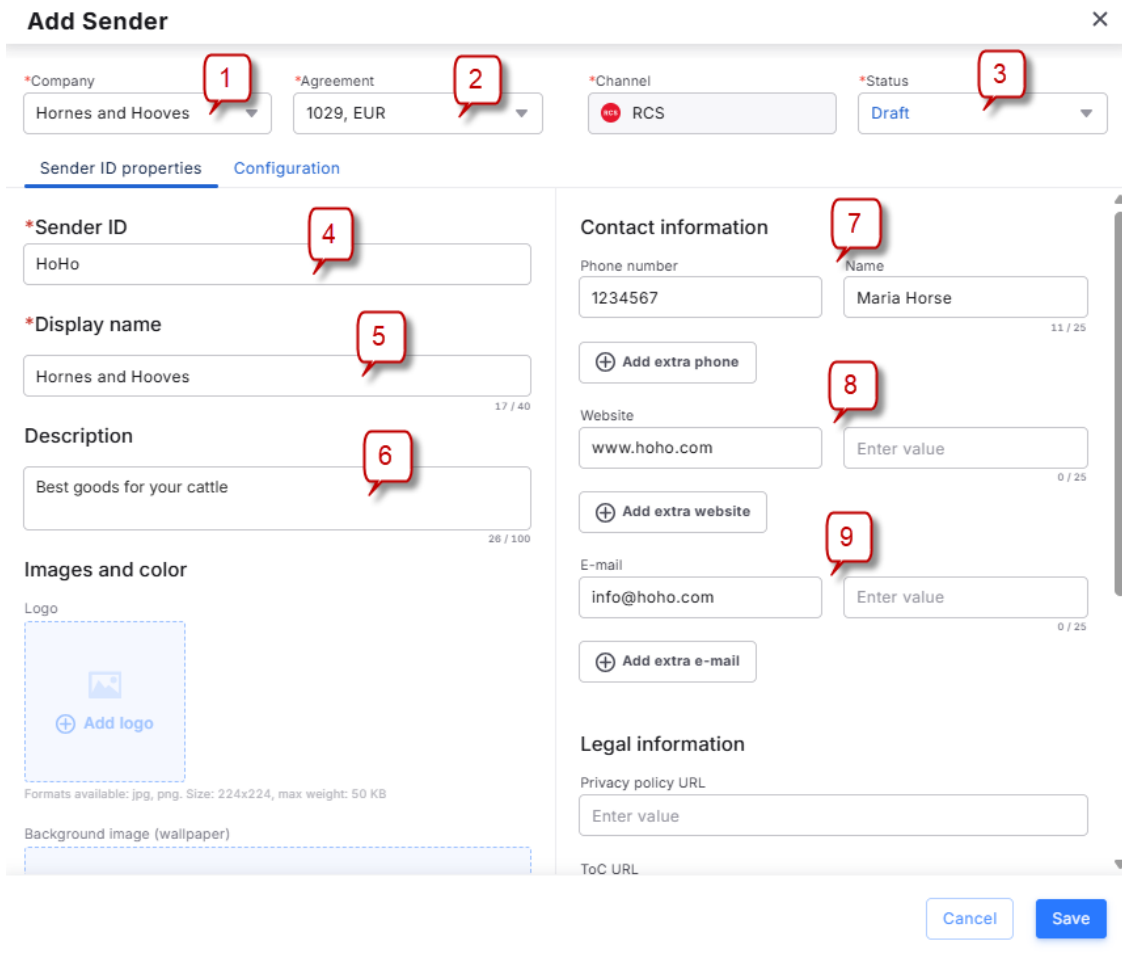
*Login HoHo	1	*Password 12345	2
Service type Enter value		*Connection Enter value	

HTTP settings

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

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 (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.

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 ✕

*Company
Hornes and Hooves

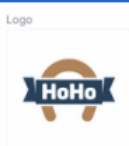
*Agreement
1029, EUR

*Channel
RCS

*Status
Draft

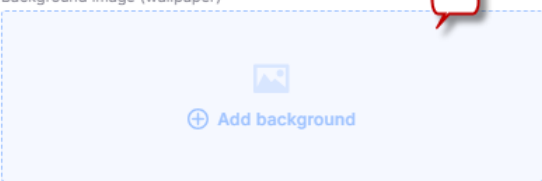
Sender ID properties Configuration

Logo 1



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

Background image (wallpaper) 2



+ Add background

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

*Color 3

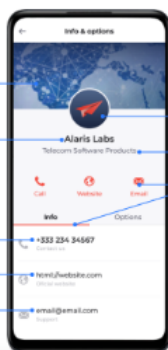
+ Add extra e-mail

Legal information 4

Privacy policy URL

ToC URL

Example 5



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.

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

Add Sender ✕

*Company
Hornes and Hooves Resell ▼

*Agreement
4321, EUR ▼

*Channel
RCS

*Status
Draft ▼

Sender ID properties
Configuration

*Webhook GUID 1
 +

*Vendor type 2

*API access key (JSON file) 4

*Agent ID 5

*Connection 6

Notification settings 7

*Minimal message count for starting detecting ⓘ 8

*Window size ⓘ 9

*Trigger percent 10

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.

Google RBM configuration
 1. Create a new agent in Google RBM 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 AP/ access key here,
 5. There, go to Intergration menu, then Cloud Pub/Sub > View subscription — Edit subscription, set Delivery type to Push and press Edit,
 6. Paste the following URL to Webhook endpoint URLfield: https://your.domain.com/google/sync?bot_id=null and press Verify,
 7. If verified successfully, press Save.

Cancel
Save

Add Sender (RCS, Configuration, Vendor type: Google RBM)

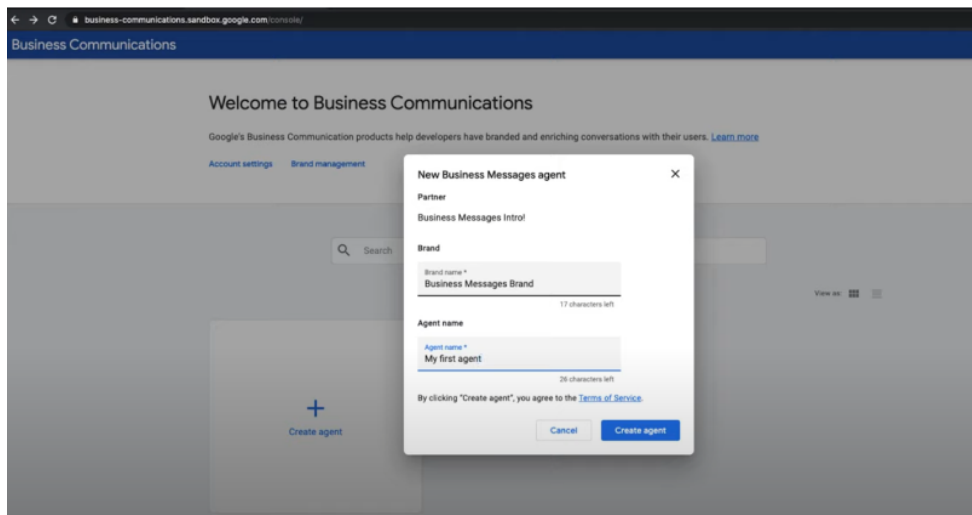
For Google RBM:

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*: *Google RBM*.
3. Configure the fields for the selected vendor type as explained in the instructions.
4. *API access Key (JSON file)*: key for access to Google RBM API. Click on the field and upload a configuration file in JSON format provided by Google RBM. 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 Google IBM Console.

6. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁶⁶.
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.

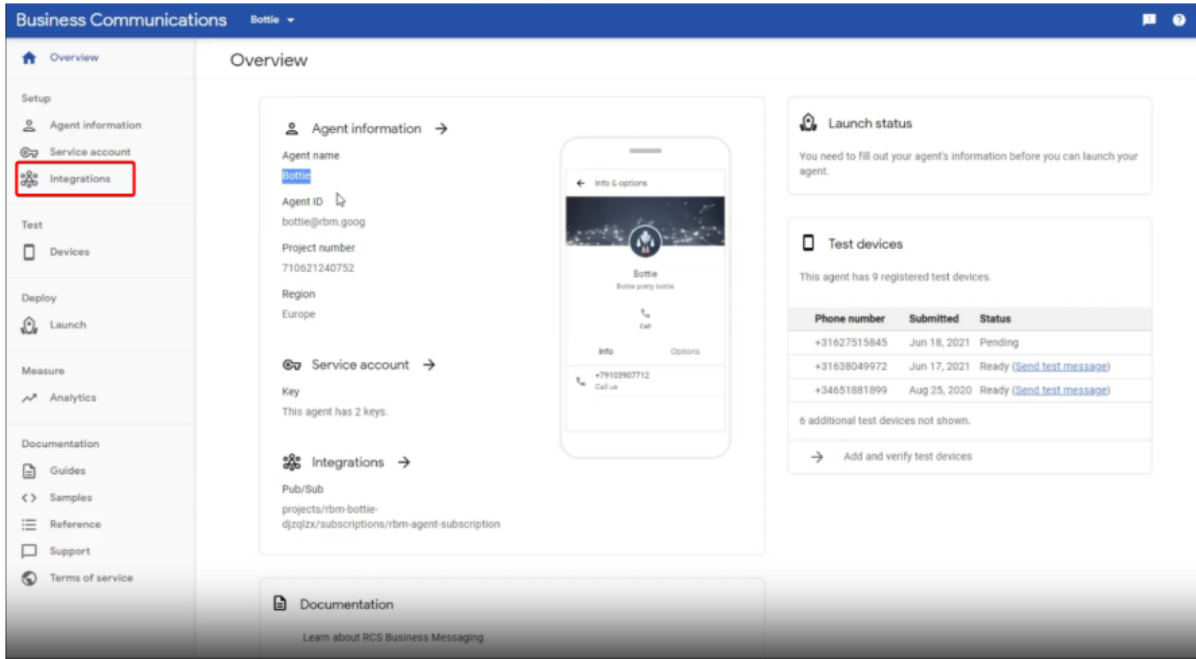
1. For message sending it is necessary to create a New Business Messages Agent with Google RBM which will be the representation of the Brand or Service using the Sender ID.



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.



Google RBM Overview

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

Add Sender ✕

*Company Hornes and Hooves Resell ▾	*Agreement 4321, EUR ▾	*Channel RCS	*Status Draft ▾
--	---------------------------	-----------------	--------------------

Sender ID properties Configuration

*Webhook GUID 1
 ➕

*Vendor type 2
 ▾

*Login 3

*Password 4

*Token duration 5

*Connection 6
 ▾

Notification settings 7

*Minimal message count for starting detecting ⓘ 8

*Window size ⓘ 9

*Trigger percent 10

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 this platform and open its properties (Start — Carriers + 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 this platform,
3. There, copy Client ID and Client secret values and paste them as Login and Password here, respectively,
4. Leave Token TTL value at its default of 3600 seconds, unless you're explicitly instructed to set another value,
6. On this platform, set the following Webhook URL for the bot:

https://your.domain.com/google/sync?bot_id=null

Cancel 11

Save

Vendor type: GSMA TRANSIT

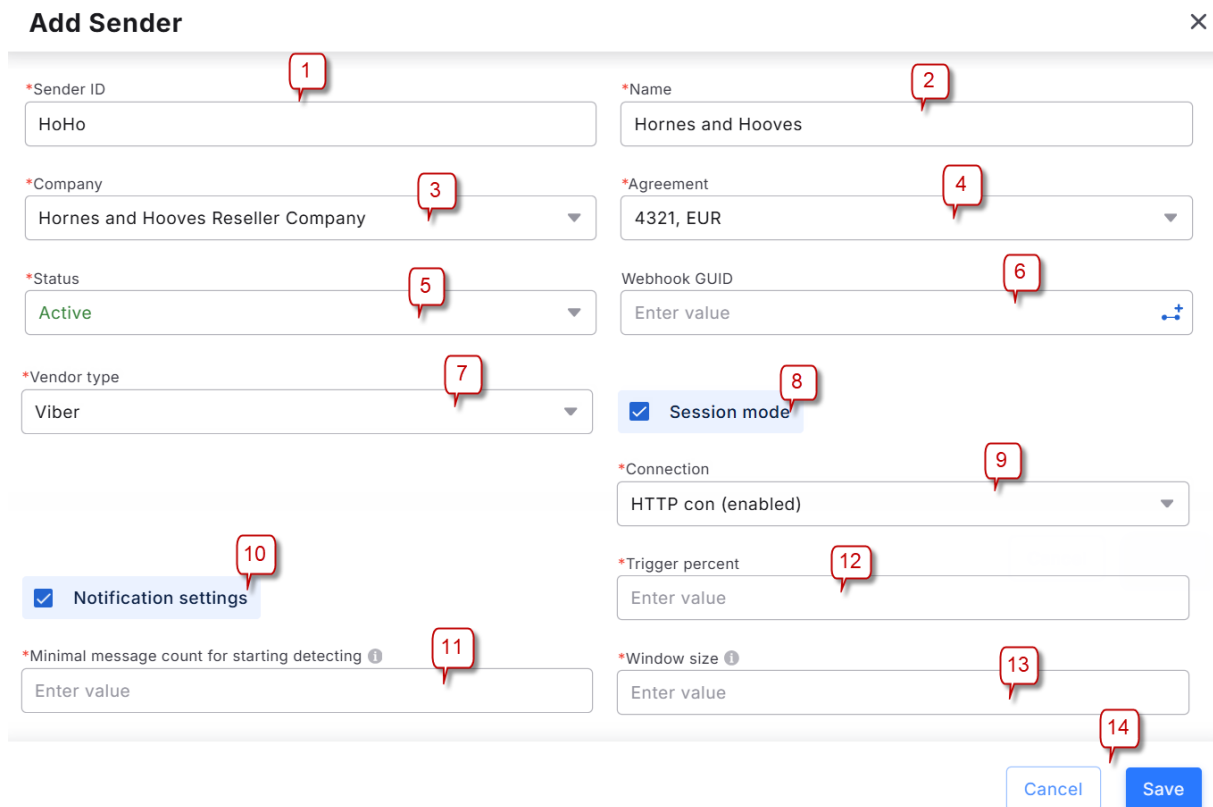
For *GSMA Transit*:

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*: *GSMA Transit*.
3. *Login*: the *Client ID* field for the RCS bot created at the partner transit platform.
4. *Password*: the *Client secret* field for the RCS bot created at the partner transit platform.
5. *Token duration*: the token TTL (the recommended value is 3600 seconds).
6. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁶⁶.
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.


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 (Vendor type: Viber)

For *Viber*:

1. *Sender ID*: matches Service ID value created in [Settings\HTTP connections](#) ¹⁶⁶, 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*.

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](#)^[166].
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 ✕



<p>*Sender ID 1</p> <input type="text" value="HoHo"/>	<p>*Name 2</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company 3</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement 4</p> <input type="text" value="4321, EUR"/>
<p>*Status 5</p> <input type="text" value="Active"/>	<p>Webhook GUID 6</p> <input type="text" value="Enter value"/>
<p>*Vendor type 7</p> <input type="text" value="Transit Viber"/>	<p><input checked="" type="checkbox"/> Session mode 8</p>
<p>*Login 9</p> <input type="text" value="Enter value"/>	<p>*Password</p> <input type="text" value="Enter value"/>
<p>Service type</p> <input type="text" value="Enter value"/>	<p>*Connection 10</p> <input type="text" value="Default Transit Viber (enabled)"/>
<p><input checked="" type="checkbox"/> Notification settings 11</p>	<p>*Trigger percent 13</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting 12</p> <input type="text" value="Enter value"/>	<p>*Window size 14</p> <input type="text" value="Enter value"/>

15

Add Sender (Vendor type: Transit Viber)


For *Transit Viber*:

1. *Sender ID*: matches Service ID value created in [Settings\HTTP connections](#)^[166], 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*: *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](#) .

Add Sender ✕

<p>*Sender ID 1</p> <input type="text" value="Hornes and Hooves"/>	<p>*Name 2</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company 3</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement 4</p> <input type="text" value="4321, EUR"/>
<p>*Status 5</p> <input type="text" value="Active"/>	<p>Webhook GUID 6</p> <input type="text" value="Enter value"/> +
<p>*WABA Id 7</p> <input type="text" value="Hornes and Hooves"/>	<p><input checked="" type="checkbox"/> Is Sync 8</p>
<p>*Vendor type 9</p> <input type="text" value="Dialog360"/>	<p>*Connection 10</p> <input type="text" value="Default Dialog360 (enabled)"/>
<p>*API key</p> <input type="text" value="Enter value"/>	<p>*Media URL</p> <input type="text" value="https://waba.360dialog.io/v1/media"/>
<p><input checked="" type="checkbox"/> Notification settings 12</p>	<p>*Trigger percent 14</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting 13</p> <input type="text" value="Enter value"/>	<p>*Window size 15</p> <input type="text" value="Enter value"/>

Cancel
Save
16

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](#) 76.

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*;

- c. *Telin*;
 - d. *Telin NeuAPIX*
 - e. *Gupshup*;
 - f. *Dialog360 Cloud*.
10. *Connection*: select a connection created in [Settings\HTTP connections](#)¹⁶⁶.
 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](#)⁷⁶.
2. On the stage of creating a Sender ID ([Account management\Sender IDs](#)³⁹) in the *Vendor Type* field choose *Dialog360*. After that several additional fields will become available:

Add Sender ✕

<p>*Sender ID a</p> <input type="text" value="HoHo"/>	<p>*Name b</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company c</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement d</p> <input type="text" value="4321, EUR"/>
<p>*Status e</p> <input type="text" value="Active"/>	<p>Webhook GUID f</p> <input type="text" value="Enter value"/>
<p>*WABA Id g</p> <input type="text" value="Hornes and Hooves"/>	<p><input checked="" type="checkbox"/> Is Sync h</p>
<p>*Vendor type i</p> <input type="text" value="Dialog360"/>	<p>*Connection j</p> <input type="text" value="Enter value"/>
<p>*API key k</p> <input type="text" value="Enter value"/>	<p>*Media URL l</p> <input type="text" value="https://waba.360dialog.io/v1/media"/>
<p><input checked="" type="checkbox"/> Notification settings m</p>	<p>*Trigger percent o</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting ⓘ n</p> <input type="text" value="Enter value"/>	<p>*Window size ⓘ p</p> <input type="text" value="Enter value"/>

Cancel
Save

Add Sender: Dialog360

- 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.
- 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*: Dialog360.
- j. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁶⁶.
- k. *API key*: copy the API key from your account at the WhatsApp service provider.
- l. *Media URL*: copy the URL from your account at the WhatsApp service provider.
- 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.

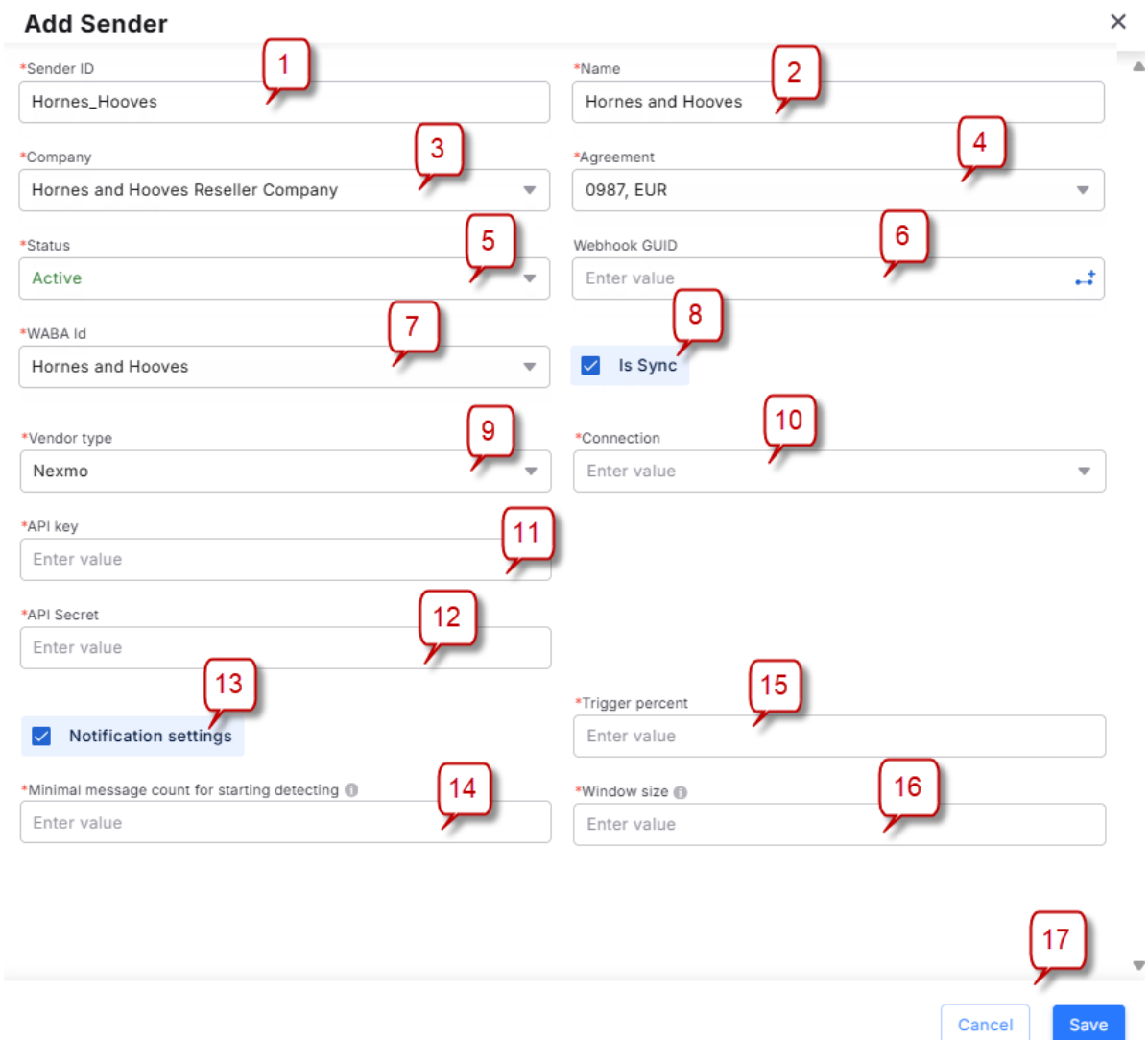
- o. *Trigger percent*: threshold error rate that triggers notifications.
- p. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- q. Click *Save* to save the record or *Cancel* to discard the settings.

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](#) ⁷⁶.



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

- 1. *Sender ID: Hornes_Hooves
- 2. *Name: Hornes and Hooves
- 3. *Company: Hornes and Hooves Reseller Company
- 4. *Agreement: 0987, EUR
- 5. *Status: Active
- 6. Webhook GUID: Enter value
- 7. *WABA Id: Hornes and Hooves
- 8. Is Sync
- 9. *Vendor type: Nexmo
- 10. *Connection: Enter value
- 11. *API key: Enter value
- 12. *API Secret: Enter value
- 13. Notification settings
- 14. *Minimal message count for starting detecting: Enter value
- 15. *Trigger percent: Enter value
- 16. *Window size: Enter value
- 17. (Bottom right corner)

Buttons: 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](#)^[166].
11. *API key*: copy the API key from your account at the WhatsApp service provider.
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 Telin

Telin is a service provider 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 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](#)^[76]).

Add WABA ×

*Name a

*Company b

*WABA Id c

*Timezone d

*Namespace e

f

Add WABA

- a. *Name*: type the WABA name.
 - b. *Company*: select the company for which the Telin WABA will be used.
 - c. *WABA Id*: enter the WABA ID from your Telin WABA account.
 - d. *Timezone*: select the timezone for the WABA.
 - e. *Namespace*: copy the namespace code from your WABA account. Note that Telin may not provide you with the Namespace. In this case, any value can be used.
 - 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\Telin](#).^[168]
 4. Create a WA Sender ID ([Account Management /Sender IDs](#)^[39]): set Vendor Type as 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 Telin account. Phone number ID is a parameter, which is specific for Telin, it's sent instead of *Sender_id* in such request as SMS sending and templates.

Add Sender ✕

<p>*Sender ID a</p> <input type="text" value="HoHo"/>	<p>*Name b</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company c</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement d</p> <input type="text" value="4321, EUR"/>
<p>*Status e</p> <input type="text" value="Active"/>	<p>Webhook GUID f</p> <input type="text" value="Enter value"/>
<p>*WABA Id g</p> <input type="text" value="Hornes and Hooves"/>	<p><input checked="" type="checkbox"/> Is Sync h</p>
<p>*Vendor type i</p> <input type="text" value="Telin"/>	<p>*Connection j</p> <input type="text" value="WA con Telin (enabled)"/>
<p>*App ID</p> <input type="text" value="Enter value"/>	<p>*Phone number ID</p> <input type="text" value="Enter value"/>
<p><input checked="" type="checkbox"/> Notification settings l</p>	<p>*Access token</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting m</p> <input type="text" value="Enter value"/>	<p>*Trigger percent n</p> <input type="text" value="Enter value"/>
<p>*Window size o</p> <input type="text" value="Enter value"/>	<p>*Window size p</p> <input type="text" value="Enter value"/>

Add Sender: 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.
- 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*: Telin.
- j. *Connection*: select a connection created in [Settings\HTTP connections](#) ¹⁶⁶.
- k. *App ID, Phone Number ID, Access token*: parameters are filled in accordance with your registered Telin account.

- l. *Notification settings*: checkbox for traffic monitoring notifications.
- m. *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.
- n. *Trigger percent*: threshold error rate that triggers notifications.
- o. *Window size*: the size of the time window (minutes) to consider for the statistics count.
- p. Click *Save* to save the changes or *Cancel* to discard the settings.

NOTE: Telin NeuAPIX is also available.

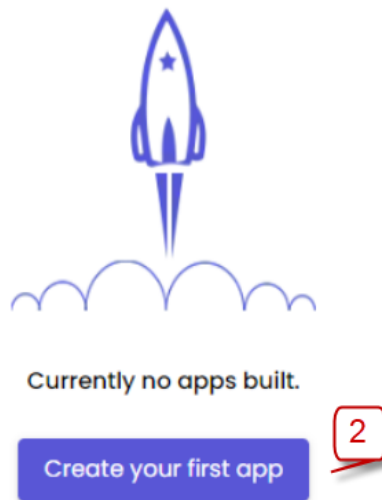
6.5.4.4 Gupshup

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:



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

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



4. Get App Name, App ID and API key in the Settings tab.
5. 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.
6. 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](#)¹⁷⁰.

7. Create a corresponding Sender ID in [Account management\Sender IDs](#).
8. Choose WhatsApp Sender ID type for the new sender:

New sender ×

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

Apply

New sender: WhatsApp

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

Add Sender ✕

*Sender ID a Hornes_Hooves	*Name b Hornes and Hooves
*Company c Hornes and Hooves Reseller Company	*Agreement d 0987, EUR
*Status e Active	Webhook GUID f Enter value
*WABA Id g Hornes and Hooves	<input checked="" type="checkbox"/> Is Sync h
*Vendor type i Gupshup	*Connection j Enter value
<input checked="" type="checkbox"/> Notification settings n	*App ID k Enter value
*Minimal message count for starting detecting o Enter value	*API key l Enter value
	*Access media token m Enter value
	*Trigger percent p Enter value
	*Window size q Enter value
	r

Add Sender: Gupshup

- 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*.
- f. *Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from Gupshup.
- g. *WABA Id*: enter the WABA ID from your Gupshup WABA account.
- h. *Is Sync*: when enabled, the API key value is synchronized with the WhatsApp service provider.
- i. *Vendor type*: Gupshup.
- j. *Connection*: select the HTTP connection created for Gupshup Integrations Platform.
- k. *App ID*: App ID from the Settings tab of your Gupshup account.
- l. *API key*: API key from the Settings tab of your Gupshup account.
- m. *Access media token*: use the token as detailed in [Appendix 4. Getting the access token for your Gupshup App](#) ²²⁹.
- 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.

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.](#)^[229]

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](#)^[166].
2. On the stage of creating a Sender ID ([Account management\Sender IDs](#)^[39]) in the *Vendor Type* field choose *Dialog360 Cloud*. After that several additional fields will become available:

Add Sender ✕

*Sender ID 1	Hornes_Hooves	*Name 2	Hornes and Hooves
*Company 3	Hornes and Hooves Reseller Company	*Agreement 4	0987, EUR
*Status 5	Active	Webhook GUID 6	Enter value +
*WABA Id 7	Hornes and Hooves	<input checked="" type="checkbox"/> Is Sync 8	
*Vendor type 9	Dialog360 Cloud	*Connection 10	Enter value
*API key 11	Enter value	*Trigger percent 14	Enter value
<input checked="" type="checkbox"/> Notification settings 12		*Window size 15	Enter value
*Minimal message count for starting detecting ⓘ 13	Enter value		

16
Cancel
Save

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](#) ¹⁶⁶.

11. *API key*: copy the API key from your account at the WhatsApp service provider.
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 record or *Cancel* to discard the settings.

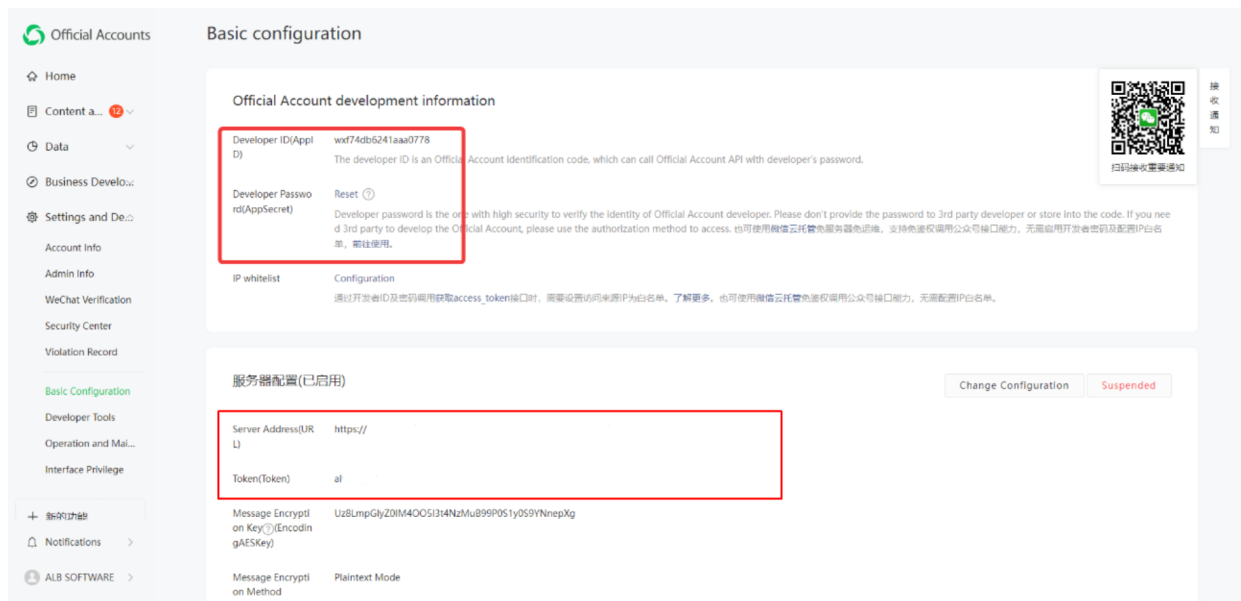
6.5.5 WeChat Sender IDs

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:

New sender ×

- SMS
- RCS
- Viber
- WhatsApp
- WeChat 3
- Email
- Telegram Gateway
- Push
- TTS
- Voice
- Mobile Push

Apply

New sender: WeChat

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

Add Sender ✕

<p>*Sender ID a</p> <input type="text" value="HoHo"/>	<p>*Name b</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company c</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement d</p> <input type="text" value="0987, EUR"/>
<p>*Status e</p> <input type="text" value="Active"/>	<p>Webhook GUID f</p> <input type="text" value="Enter value"/>
<p>*Vendor type g</p> <input type="text" value="WeChat"/>	<p>*Connection h</p> <input type="text" value="Enter value"/>
<p>*App ID</p> <input type="text" value="Enter value"/>	<p>*AppSecret</p> <input type="text" value="Enter value"/>
<p><input checked="" type="checkbox"/> Notification settings j</p>	<p>*Token i</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting ⓘ k</p> <input type="text" value="Enter value"/>	<p>*Trigger percent l</p> <input type="text" value="Enter value"/>
	<p>*Window size ⓘ m</p> <input type="text" value="Enter value"/>

n

Add Sender: WeChat

- 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*.
- f. *Webhook GUID*: click to generate Webhook GUID. Webhook GUID will be used to recognize webhooks from WeChat.
- g. *Vendor type*: WeChat.
- h. *Connection*: select the HTTP connection created for WeChat.
- i. *App ID*, *AppSecret* and *Token*: these credentials are provided by WeChat.
- j. *Notification settings*: checkbox for traffic monitoring notifications.

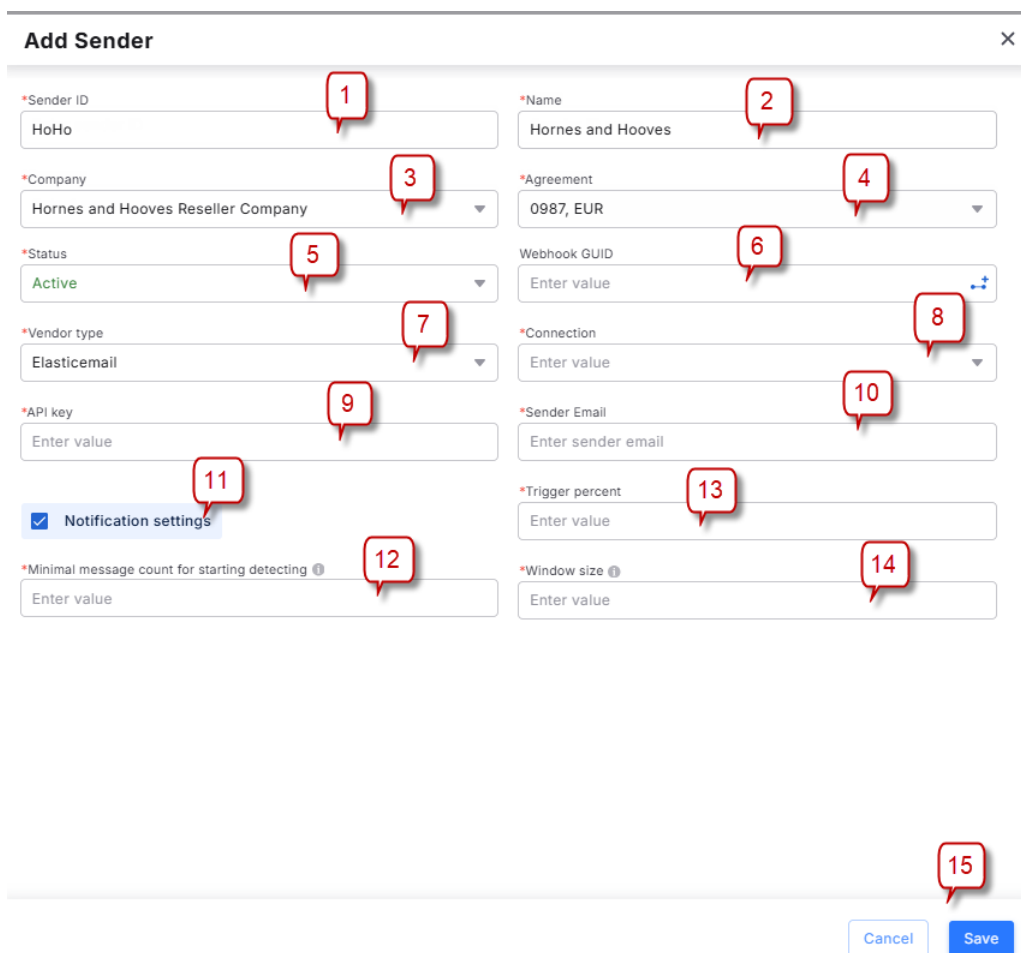
- k. *Minimal message count for starting detecting*: minimum number of messages needed to start sending notifications. The error rate below this minimum is not taken into account in order to prevent false positives.
- l. *Trigger percent*: threshold error rate that triggers notifications.
- m. *Window 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: Save button


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.

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.

Add Sender ✕

<p>*Sender ID 1</p> <input style="width: 90%;" type="text" value="HoHo"/>	<p>*Name 2</p> <input style="width: 90%;" type="text" value="Hornes and Hooves"/>
<p>*Company 3</p> <div style="border: 1px solid #ccc; padding: 2px;"> Hornes and Hooves Reseller Company </div>	<p>*Agreement 4</p> <div style="border: 1px solid #ccc; padding: 2px;"> 0987, EUR </div>
<p>*Status 5</p> <div style="border: 1px solid #ccc; padding: 2px; color: green;"> Active </div>	<p>Webhook GUID 6</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value ➕ </div>
<p>*Vendor type 7</p> <div style="border: 1px solid #ccc; padding: 2px;"> Telegram Gateway </div>	<p>*Connection 8</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value </div>
<p>*API key 9</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value </div>	<p><input checked="" type="checkbox"/> Is verified 10</p>
<p><input checked="" type="checkbox"/> Notification settings 11</p>	<p>*Trigger percent 13</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value </div>
<p>*Minimal message count for starting detecting 12</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value </div>	<p>*Window size 14</p> <div style="border: 1px solid #ccc; padding: 2px;"> Enter value </div>

Cancel
Save

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](#) 176.
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.
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 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.

Add Sender ✕

<p>*Sender ID 1</p> <input type="text" value="HoHo"/>	<p>*Name 2</p> <input type="text" value="Hornes and Hooves"/>
<p>*Company 3</p> <input type="text" value="Hornes and Hooves Reseller Company"/>	<p>*Agreement 4</p> <input type="text" value="0987, EUR"/>
<p>*Status 5</p> <input type="text" value="Active"/>	<p>Webhook GUID 6</p> <input type="text" value="Enter value"/>
<p>*Vendor type 7</p> <input type="text" value="Firebase"/>	
<p>*API key 8</p> <p>No file JSON</p>	
<p><input checked="" type="checkbox"/> Notification settings 9</p>	<p>*Trigger percent 11</p> <input type="text" value="Enter value"/>
<p>*Minimal message count for starting detecting 10</p> <input type="text" value="Enter value"/>	<p>*Window size 12</p> <input type="text" value="Enter value"/>

13

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.
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.

6.5.9 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.

Add Sender ×

*Sender ID 1	HoHo	*Name 2	Hornes and Hooves
*Company 3	Hornes and Hooves Reseller Company	*Agreement 4	0987, EUR
*Status 5	Active	Webhook GUID 6	Enter value
*Vendor type 7	Asterisk	Webhook URL 8	Enter value
<input checked="" type="checkbox"/> Notification settings 9		*Trigger percent 11	Enter value
*Minimal message count for starting detecting 10	Enter value	*Window size 12	Enter value

13

Add Sender (TTS)

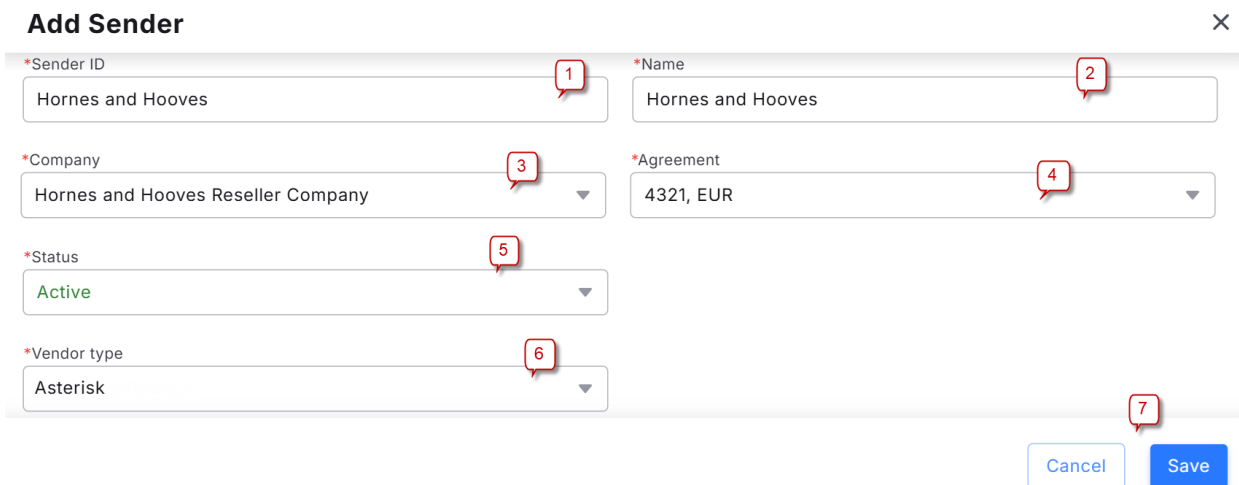
1. *Sender ID*: enter the numeric or alphanumeric code given by the service provider.
2. *Name*: type the Sender ID name that will be displayed in messages.
3. *Company*: select the company for which the Sender ID will be used.
4. *Agreement*: select the agreement for which the Sender ID will be used.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

6.5.10 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	Hornes and Hooves	*Name 2	Hornes and Hooves
*Company 3	Hornes and Hooves Reseller Company	*Agreement 4	4321, EUR
*Status 5	Active		
*Vendor type 6	Asterisk		

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

6.5.11 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	*Name 2	Hornes and Hooves
*Company 3	Hornes and Hooves Reseller Company	*Agreement 4	4321, EUR
*Status 5	Active	Webhook GUID 6	Enter value +
*Vendor type 7	Mobile Push		
*Login 8	Hohoho	*Password 9	1234567
		*Connection 10	mobile_push (enabled)
<input checked="" type="checkbox"/> Notification settings 11		*Trigger percent 13	Enter value
*Minimal message count for starting detecting ⓘ 12	Enter value	*Window size ⓘ 14	Enter value

Cancel
Save 15

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.
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](#) ¹⁶⁶.
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.

6.6 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					
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.

Add WABA ×

*Name 1

HoHo WABA

*Company 2

Hornes and Hooves Reseller Company

*WABA Id 3

102938947678901

*Timezone 4

Europe/Amsterdam +02:00

*Namespace 5

b5dbc459-8fab-4adf-aed7-0fdea77415b4 6

Cancel
Save

Add WABA

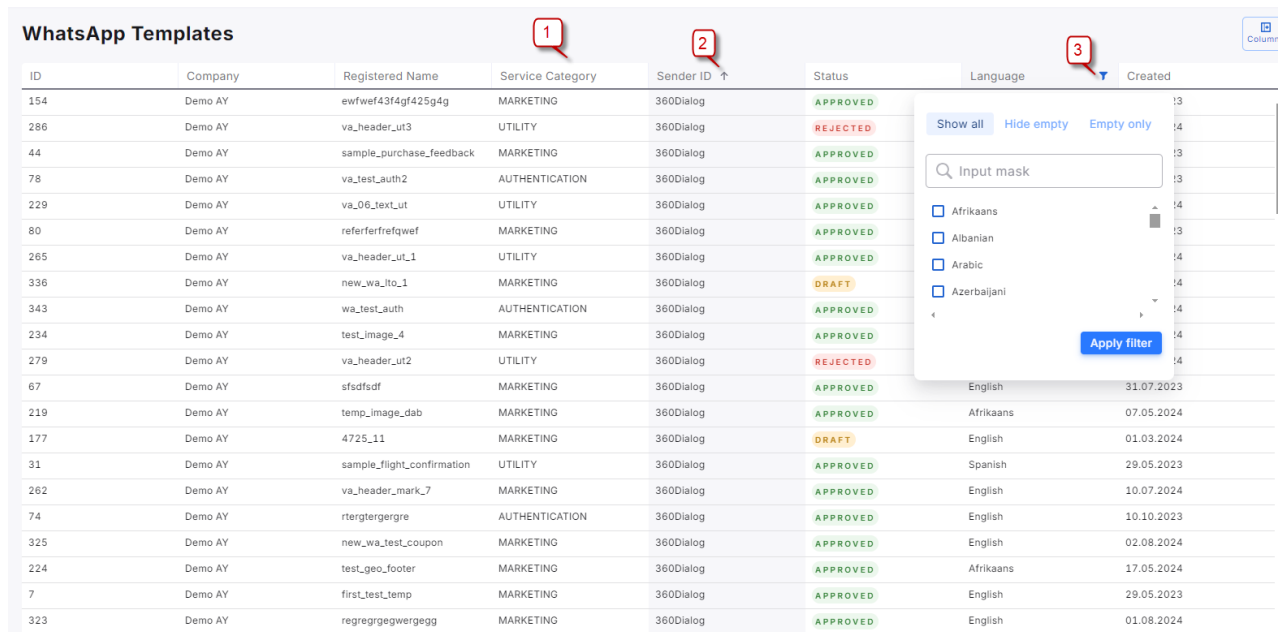
1. *Name*: type the WABA name.
2. *Company*: select the company for which the WABA will be used.

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.



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	referferfrefqwe	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	regregrgewergegg	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*);
 - *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.

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 <input type="text" value="Copy Code"/>	Button text <input type="text" value="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.

New Sender ID Application

- Assigned to

09.08.2024 07:46
Created09.08.2024 07:46
UpdatedNEW
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](#) ³⁹).
- 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.

New Sender ID Application

Morgan_morgan Freeman Assigned to | 19.12.2023 13:51 Created | 19.12.2023 14:05 Updated | X

IN PROGRESS
SuperPet
Sender ID

***Company**

***Channel**

Display name

8 / 40

Contact information

Phone number

5 / 25

Name

5 / 25

Website

20 / 25

Visit super pet shop

20 / 25

E-mail

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

2

Reject application

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							Columns	+ Add printable form
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.

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

Add Printable form ✕

*Type 1

charge
▼

Legal entity 2

System owner
▼

*Name 3

SMS messaging charge

Date from 4

26.12.2023
📅

Resource 5

SMS messaging - SMS message
▼

*File 6

_reports_charge.xlsx
✕

Comment 7

Charge templete for SMS

Cancel
Save
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.

Banks				
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)	SMBKORSE	666
407	Mumbai Mercantile Bank	India	MMBKINBB	555
406	Johannesburg Capital	South Africa	JCBKZAJJ	444
405	Shanghai Far East Bank	China	SFBKCNBJ	333
404	Caribbean Commerce Bank	Bahamas (the)	CCBBBSBS	111
403	Alpine Private Bank	Liechtenstein	APRFUJZ	990
402	Southern Cross Bank	New Zealand	SCBNZAZA	880
401	Gulf States Banking Corp.	Saudi Arabia	GSBCSAJE	770
400	Asia Pacific Commerce Bank	Hong Kong	APCBKHHK	660
399	Iberian Financial Network	Portugal	IFNPPTTP	440
398	Nordic Capital Partners	Norway	NCRKNOKK	330
397	Danube International Bank	Hungary	DBHKLHUB	220
396	Baltic Commerce Bank	Sweden	BCBSSESS	110
395	InterAlliance Bank	Australia	IBAKAUZS	990
394	WorldTrust Banking	Japan	WTBKJPUT	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

***Name**

Description

***Country**

***Address**

SWIFT code

Branch code

Bank code

Add Bank

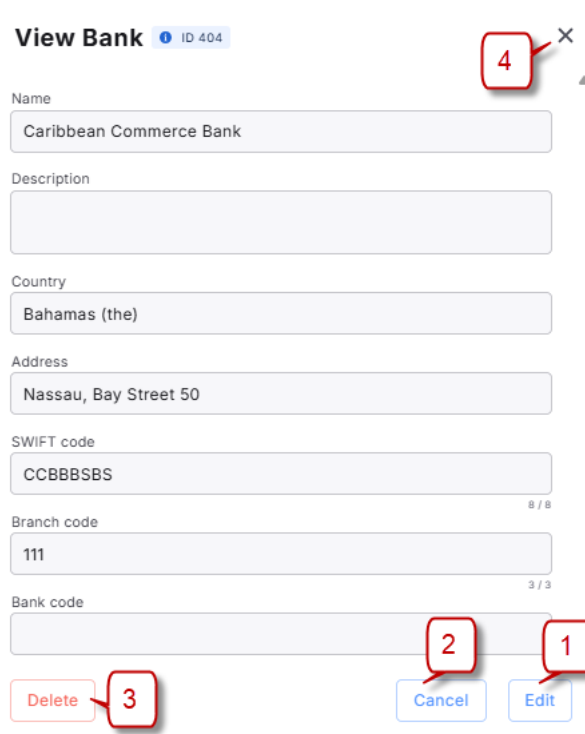
1. Provide the required information:
 - o *Name*: the official registered name of the bank or financial institution.
 - o *Description*: additional bank information.
 - o *Country*: country that the bank is registered in.
 - o *Address*: bank's legal address.
 - o *SWIFT code*: a unique identifier of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

- *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.

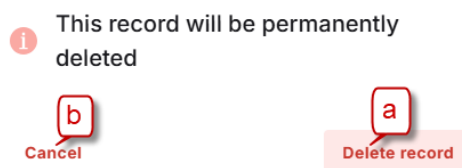
- *Bank code*: bank's internal code.
2. Click to clear the field.
 3. Click *Save* to save the profile or *Cancel* to discard the changes.
 4. Click to close the form.

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



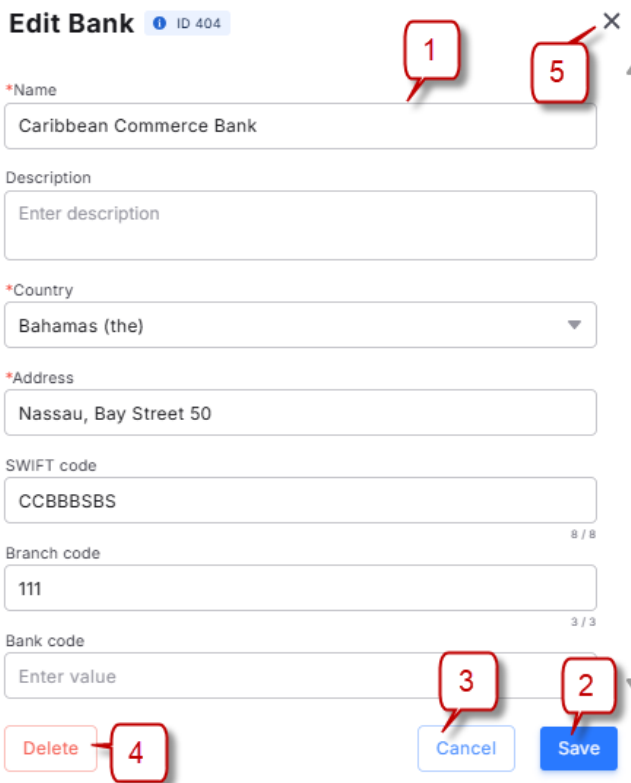
View Bank

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. Confirm before the profile is permanently deleted (see the figure below).
 - a. Click *Delete record* to confirm the deletion.
 - b. Click *Cancel* to cancel the deletion.



Delete confirmation dialog box

4. Click to close the form.



Edit Bank ID 404

*Name
Caribbean Commerce Bank

Description
Enter description

*Country
Bahamas (the)

*Address
Nassau, Bay Street 50

SWIFT code
CCBBBBBS 8 / 8

Branch code
111 3 / 3

Bank code
Enter value

Delete Cancel Save

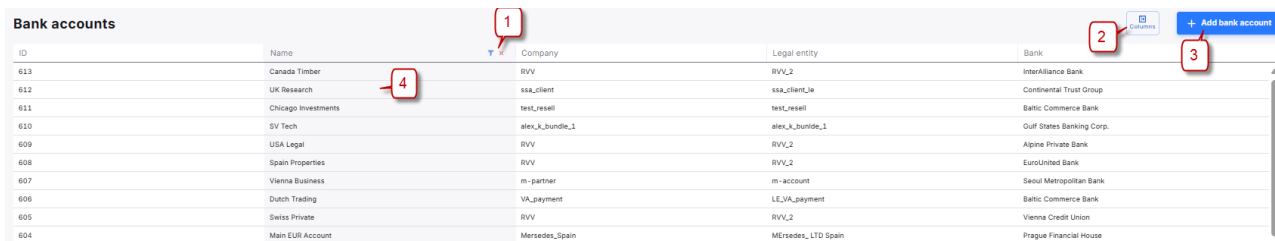
Edit Bank

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.



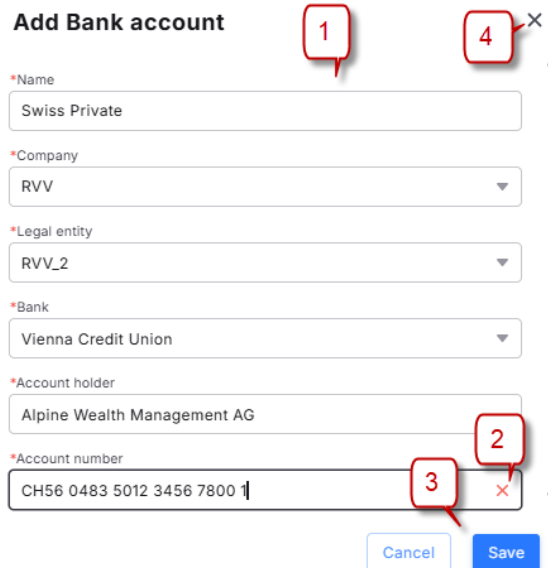
ID	Name	Company	Legal entry	Bank
613	Canada Timber	RVV	RVV_2	InterAlliance Bank
612	UK Research	ssa_client	ssa_client_1a	Confidential Trust Group
611	Chicago Investments	test_resell	test_resell	Baltic Commerce Bank
610	SV Tech	alex_k_bundle_1	alex_k_bundle_1	Gulf States Banking Corp.
609	USA Legal	RVV	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	MEresede_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.
4. 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 the 'Add Bank account' form with the following fields and callouts:

- 1**: Points to the form title 'Add Bank account'.
- 2**: Points to the 'Account holder' field containing 'Alpine Wealth Management AG'.
- 3**: Points to the 'Account number' field containing 'CH56 0483 5012 3456 7800 |'.
- 4**: Points to the close button (X) in the top right corner of the form.

Other fields include: *Name (Swiss Private), *Company (RVV), *Legal entity (RVV_2), and *Bank (Vienna Credit Union). Buttons for 'Cancel' and 'Save' are at the bottom.

Add Bank account

1. Provide the required information:
 - o *Name*: short name of the account to be displayed in the System interfaces.
 - o *Company*: client company that owns the account. Select a company from the drop-down list.
 - o *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](#)^[23] interface.
 - o *Bank*: bank where the account is opened. Select a bank from the drop-down list of banks created in the [Banks](#)^[81] interface.
 - o *Account holder*: the beneficiary name (individual or company) as registered in the bank.
 - o *Account number*: unique bank account number.
2. Click to clear a 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 account.

View Bank account ID 604 ✕

Name 4
Main EUR Account

Company
Mercedes_Spain

Legal entity
MERsedes_ LTD Spain

Bank
Prague Financial House

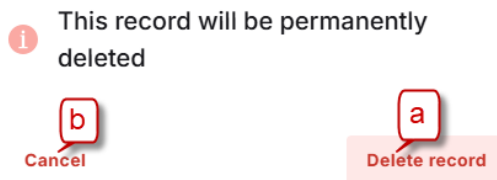
Account holder
Schmidt Automotive GmbH

Account number
DE89 3704 0044 0532 0130 00

Delete 3 Cancel Edit 2 1

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. 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.



Delete confirmation dialog box

4. Click to close the form.

Edit Bank account ID 604

1

5

*Name
Main EUR Account

*Company
Mercedes_Spain

*Legal entity
MErsedes_ LTD Spain

*Bank
Prague Financial House

*Account holder
Schmidt Automotive GmbH

*Account number
DE89 3704 0044 0532 0130 00

3

2

4

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.

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

7 Finance

7.1 Payments

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

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	ADC_FOR_NN (E...	RRR-1238798989	500 000.00	EUR	08.07.2025 13:13	08.07.2025		INBOUND	08.07.2025	500 000.00	EUR	CONFIRMED	
87	Demo AY	ADC_FOR_NN (E...	Payment_L4	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	ADC_FOR_NN (E...	Payment_L3	100.00	EUR	15.08.2024 09:50	15.08.2024		INBOUND	15.08.2024	100.00	EUR	EXPIRED	16.08.2024
43	Telecom Monst...	NC-12345 (EUR)	564854	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	ADC_FOR_NN (E...	Payment_L2	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;
- Company;
- Agreement;
- Reference code;
- Amount;
- Currency;
- Created: the date when a payment was created;
- Updated: the date when a payment was updated;
- Description;
- Direction: Inbound or Outbound.
- Payment date;
- Amount in agreement currency;
- Agreement currency;
- Confirmed: Confirmed or Not confirmed;

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 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.

- *Expiry date of confirmation.*
2. Click to customize the display of columns.
 3. Click *New payment* to register a payment manually.

Add Payment ×

*Company 1

*Agreement 2

*Payment date 3

*Reference code 4

Direction 5

*Payment amount 6

*Replenishment amount 7

CURRENCY EXCHANGE DETAILS

Exchange rate 8

1 EUR =

Exchange rate date 8

Description 9

Deferred payment 10

 Payment confirmed

Confirm payment before 11

12

Add Payment

1. *Company*: select the company for the payment.
2. *Agreement*: select the relevant agreement.
3. *Payment date*.
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*.

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 <input checked="" type="checkbox"/> Payment confirmed	

Delete
Cancel
Edit

View Payment

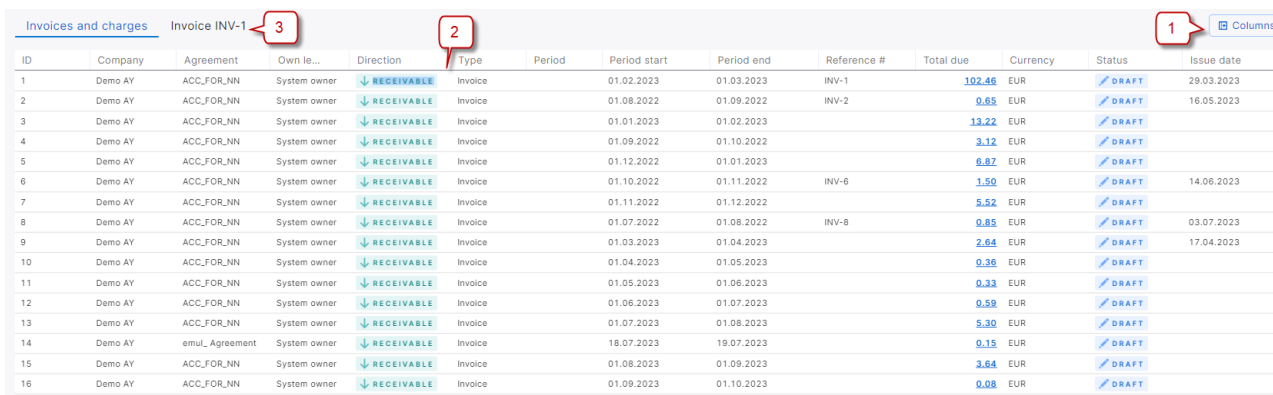
You can manually confirm a payment in the BackOffice *Finance\Payments* interface. Confirmation is instrumental if the payment was created after it was made and has already arrived to the System owner's bank account - in this case it is necessary to create a confirmed payment at once. Confirmation is 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

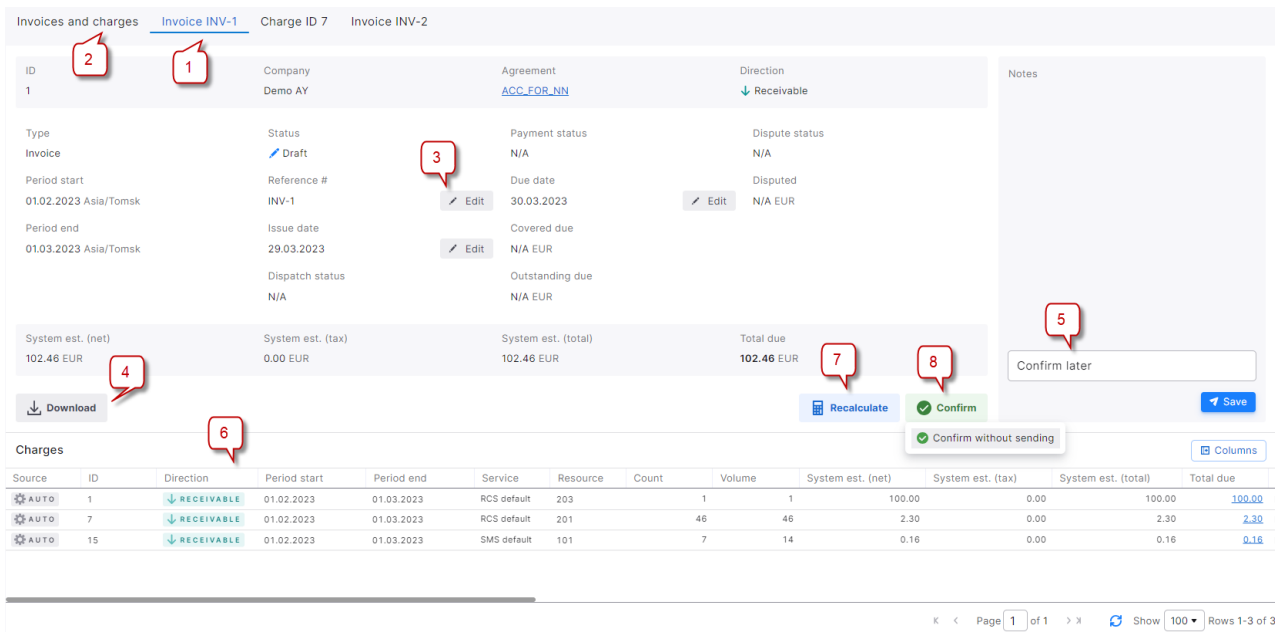
The *Finance\Invoices and charges* interface serves to handle invoices and charges. Invoices are automatically generated by the System. Generation starts at the beginning of the billing period. An invoice can be issued for the client at any time. All billable events are included in an invoice as charges,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



ID	Company	Agreement	Own le...	Direction	Type	Period	Period start	Period end	Reference #	Total due	Currency	Status	Issue date
1	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.02.2023	01.03.2023	INV-1	102.46	EUR	DRAFT	29.03.2023
2	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.08.2022	01.09.2022	INV-2	0.65	EUR	DRAFT	16.05.2023
3	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.01.2023	01.02.2023		13.22	EUR	DRAFT	
4	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.09.2022	01.10.2022		3.12	EUR	DRAFT	
5	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.12.2022	01.01.2023		6.87	EUR	DRAFT	
6	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.10.2022	01.11.2022	INV-6	1.50	EUR	DRAFT	14.06.2023
7	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.11.2022	01.12.2022		5.52	EUR	DRAFT	
8	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.07.2022	01.08.2022	INV-8	0.85	EUR	DRAFT	03.07.2023
9	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.03.2023	01.04.2023		2.64	EUR	DRAFT	17.04.2023
10	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.04.2023	01.05.2023		0.36	EUR	DRAFT	
11	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.05.2023	01.06.2023		0.33	EUR	DRAFT	
12	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.06.2023	01.07.2023		0.59	EUR	DRAFT	
13	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.07.2023	01.08.2023		5.30	EUR	DRAFT	
14	Demo AY	emul_Agreement	System owner	↓ RECEIVABLE	Invoice		18.07.2023	19.07.2023		0.15	EUR	DRAFT	
15	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.08.2023	01.09.2023		3.64	EUR	DRAFT	
16	Demo AY	ACC_FOR_NN	System owner	↓ RECEIVABLE	Invoice		01.09.2023	01.10.2023		0.08	EUR	DRAFT	

Invoices and charges

1. Click to customize the display of columns.
2. Double click or click the amount in the *Total due* column to view an invoice and charges included in it.
3. Each invoice will be opened in a separate tab sheet as illustrated in the figure above.



The screenshot displays the 'Invoice and charges' view for 'Invoice INV-1'. The interface includes a summary section with fields for ID, Company, Agreement, Direction, Type, Status, Payment status, Dispute status, Period start/end, Reference #, Due date, Issue date, Covered due, Dispatch status, Outstanding due, System est. (net/tax/total), and Total due. A 'Download' button is present with a dropdown menu. Below the summary is a 'Charges' table with columns for Source, ID, Direction, Period start/end, Service, Resource, Count, Volume, System est. (net/tax/total), and Total due. At the bottom, there are 'Recalculate', 'Confirm', and 'Confirm without sending' buttons, along with a 'Save' button and a 'Confirm later' text box.

Invoice and charges view

1. Click on a tab to view the invoice.
2. Click to go back to the table of invoices.
3. Click *Edit* to modify editable parameters.
4. Click *Download* to download the invoice and/or charge details. Select one of the following values:
 - a. *Invoice* to download the invoice only (in PDF).
 - b. *Invoice and charge details* to download the archive of charge details and invoice. The invoice and charge detail fields can be customized in [Account management\Printable forms](#) ⁸⁰.
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	Volume	System est. (net)	System est. (tax)	System est. (total)	Total due
1	1	100.00 EUR	0.00 EUR	100.00 EUR	100.00 EUR

Charge details

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

Page 1 of 1 Show 100 Rows 1-1 of 1



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.

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.

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

1. Click to customize the display of columns.
2. Hover over a record to display the edit panel. It contains the following controls:

- a. Click  to clone the record. It may come handy in creating a record with similar parameters.
- b. Click  to open the record for editing the service structure in the constructor.
- c. Click  to view and edit the service general properties.
- d. 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>*.

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

7.3.1 Creating a service

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

- I. Add a service.
- II. Configure the service scope, that is, its validity period(s).
- III. 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).

- I. To create a new service, click *Add service* and complete the fields as explained below.

Add Service ×

*Name 1

*Type 2

*Currency 3

Description 4

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.

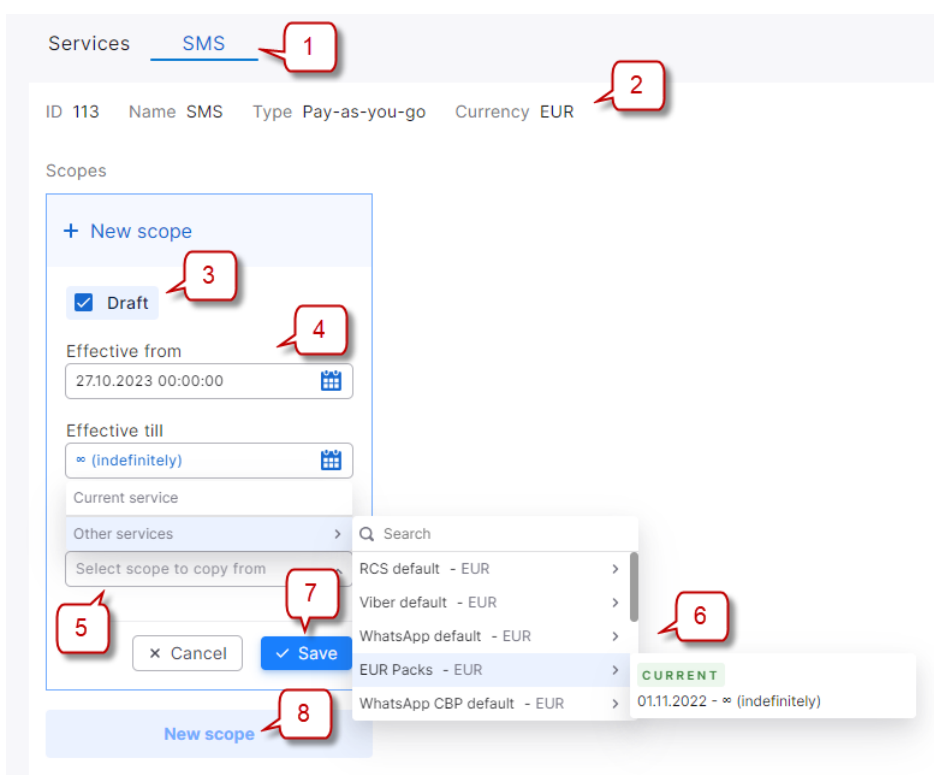
NOTE: A pack can include multiple channels. There is no breakdown by channel within a pack - for example, the user can send 900 SMS and 100 WhatsApp messages from a 1,000 message pack, or vice versa.

- 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.



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*.

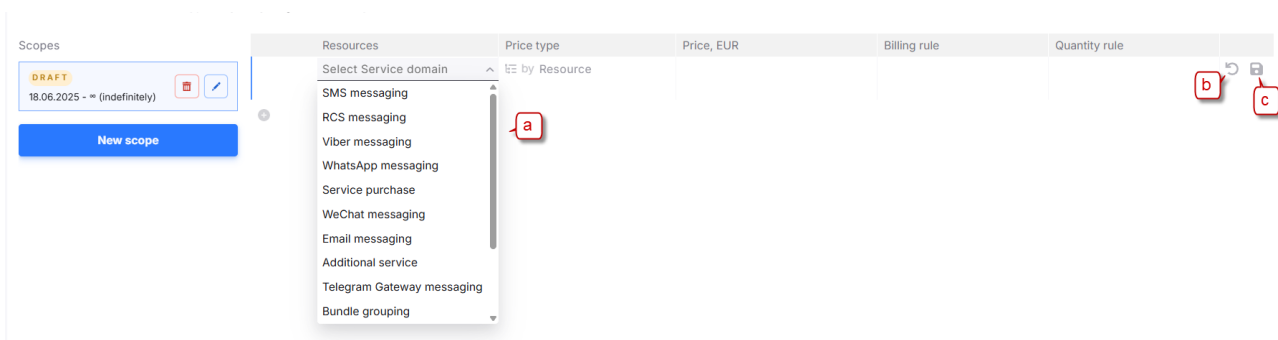
6. Select the service in the drop-down list.
7. Click *Save* to save the changes.

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.

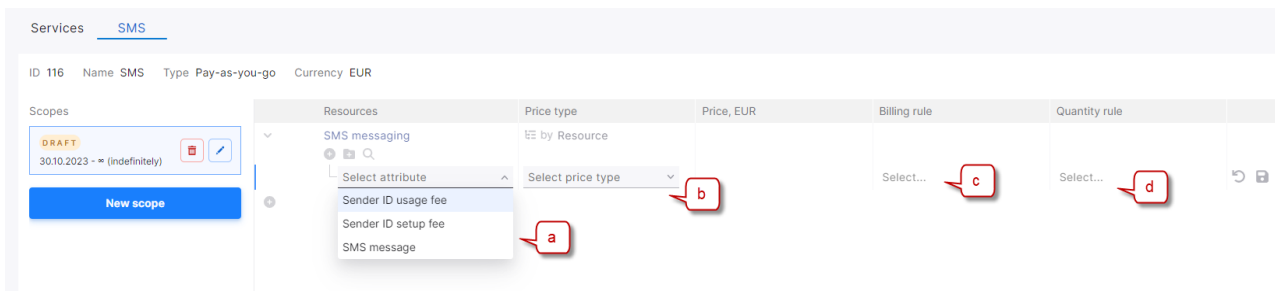


Select Service domain



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. *Additional service*;
 - ix. *Telegram Gateway messaging*;
 - x. *Bundle grouping*;
 - xi. *Push messaging*;
 - xii. *TTS messaging*;
 - xiii. *Voice calls*;
 - xiv. *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.



Configure an attribute

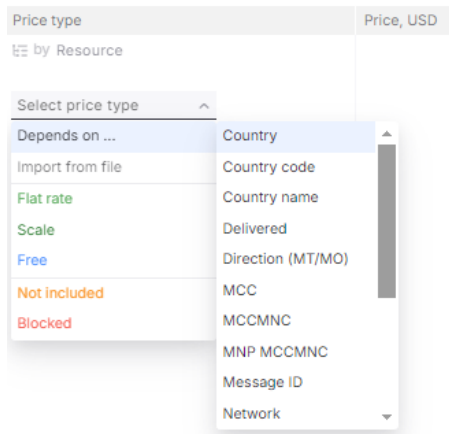
2. Select an attribute and configure its properties:
 - a. Click  to select an attribute, or  to select multiple attributes. For example, for *SMS messaging* the available options are:
 - i. *Sender ID usage fee*: the monthly fee for using the Sender ID.
 - ii. *Sender ID setup fee*: the one-time fee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

NOTE: After creating a service, go to [Account management\Sender IDs](#) ³⁹, 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](#) ³⁹. This must be done to enable write-off of the configured fees.

- iii. *SMS message*: price for the message.

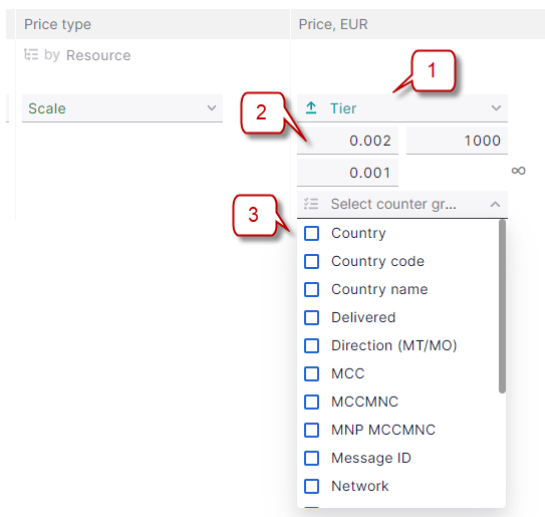
NOTE: It is recommended to set any rate value for *Others* attribute, preferably higher than the *Credit limit* value (set in the Agreement created in the [Account management\Agreements interface](#) ²⁶), in order to avoid sending traffic if the credit limit is exceeded.

- 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*
- 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.

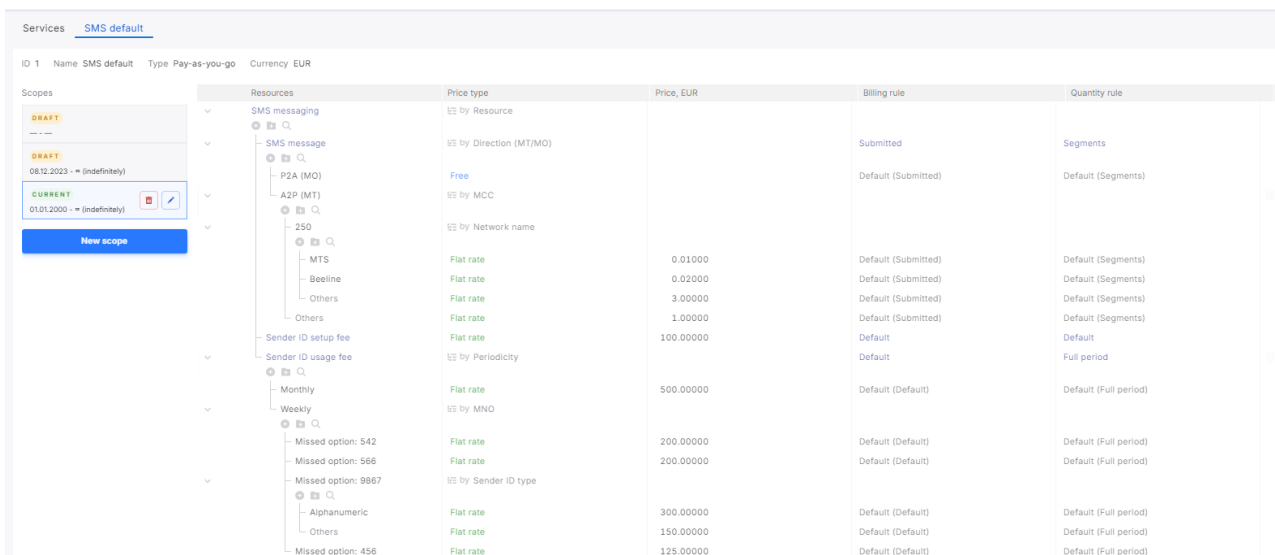


Scale

- 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.



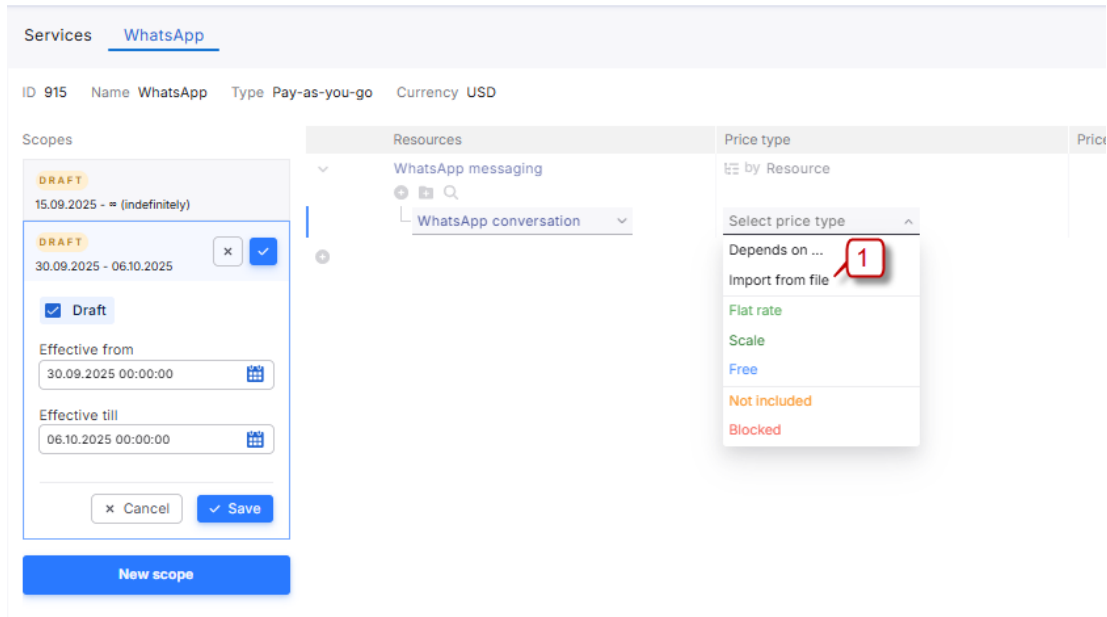
ID	Name	Type	Pay-as-you-go	Currency	EUR	Resources	Price type	Price, EUR	Billing rule	Quantity rule
08.12.2023	-	(indefinitely)				SMS messaging	EE by Resource			
08.12.2023	-	(indefinitely)				SMS message	EE by Direction (MT/MO)		Submitted	Segments
08.12.2023	-	(indefinitely)				P2A (MO)	Free		Default (Submitted)	Default (Segments)
01.01.2000	-	(indefinitely)				A2P (MT)	EE by MCC			
01.01.2000	-	(indefinitely)				250	EE by Network name			
						MTS	Flat rate	0.01000	Default (Submitted)	Default (Segments)
						Beeline	Flat rate	0.02000	Default (Submitted)	Default (Segments)
						Others	Flat rate	3.00000	Default (Submitted)	Default (Segments)
						Others	Flat rate	1.00000	Default (Submitted)	Default (Segments)
						Sender ID setup fee	Flat rate	100.00000	Default	Default
						Sender ID usage fee	EE by Periodicity		Default	Full period
						Monthly	Flat rate	500.00000	Default (Default)	Default (Full period)
						Weekly	EE by MNO			
						Missed option: 542	Flat rate	200.00000	Default (Default)	Default (Full period)
						Missed option: 566	Flat rate	200.00000	Default (Default)	Default (Full period)
						Missed option: 9867	EE by Sender ID type			
						Alphanumeric	Flat rate	300.00000	Default (Default)	Default (Full period)
						Others	Flat rate	150.00000	Default (Default)	Default (Full period)
						Missed option: 456	Flat rate	125.00000	Default (Default)	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.

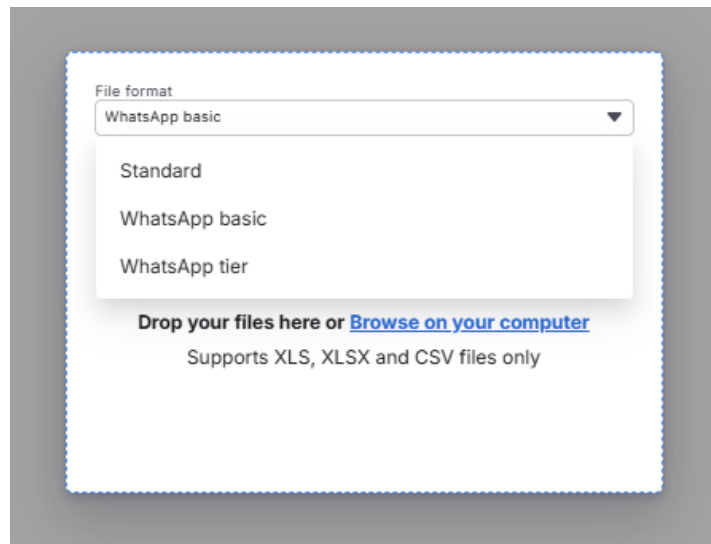


Import from file

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.

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;

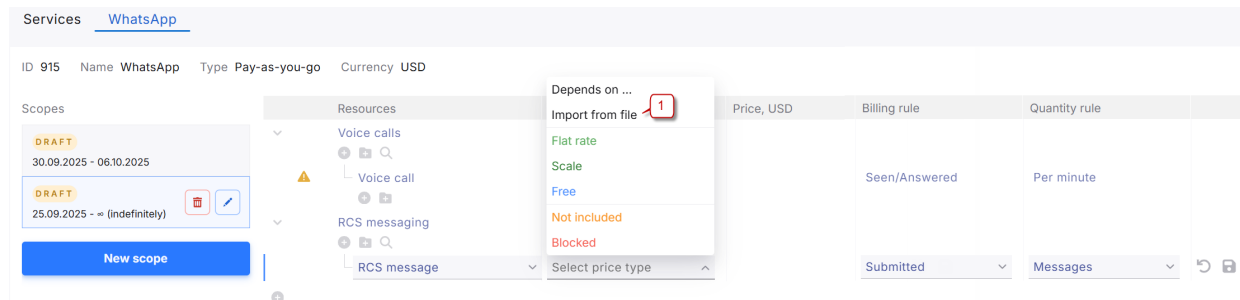
- Import confirmation.

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.

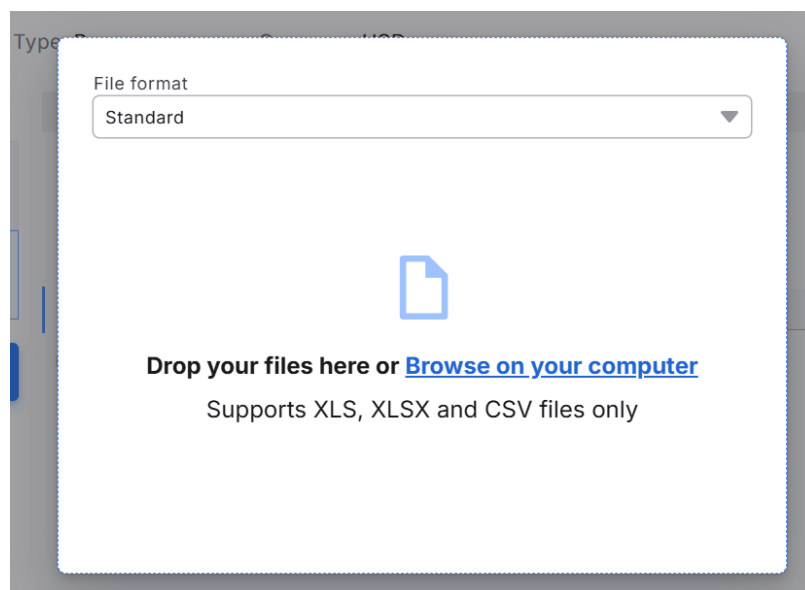
To perform import upload a file containing the rates to the System. To do this, preset *Billing rule* and *Quantity rule* rate properties when configuring the corresponding node of the rate tree and proceed as detailed below:

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



Import from file

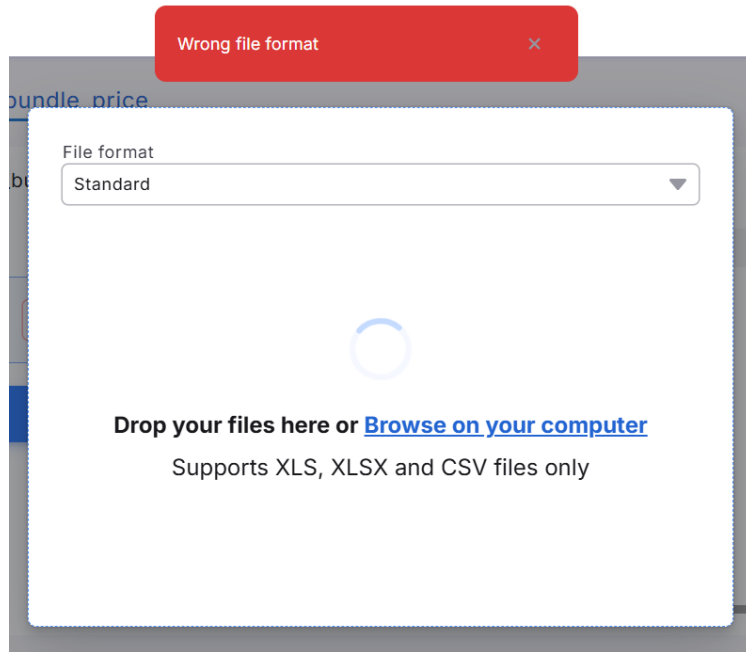
2. Select the file format (*Standard*, *WhatsApp basic* or *WhatsApp tier*) and upload a file from your device.



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.

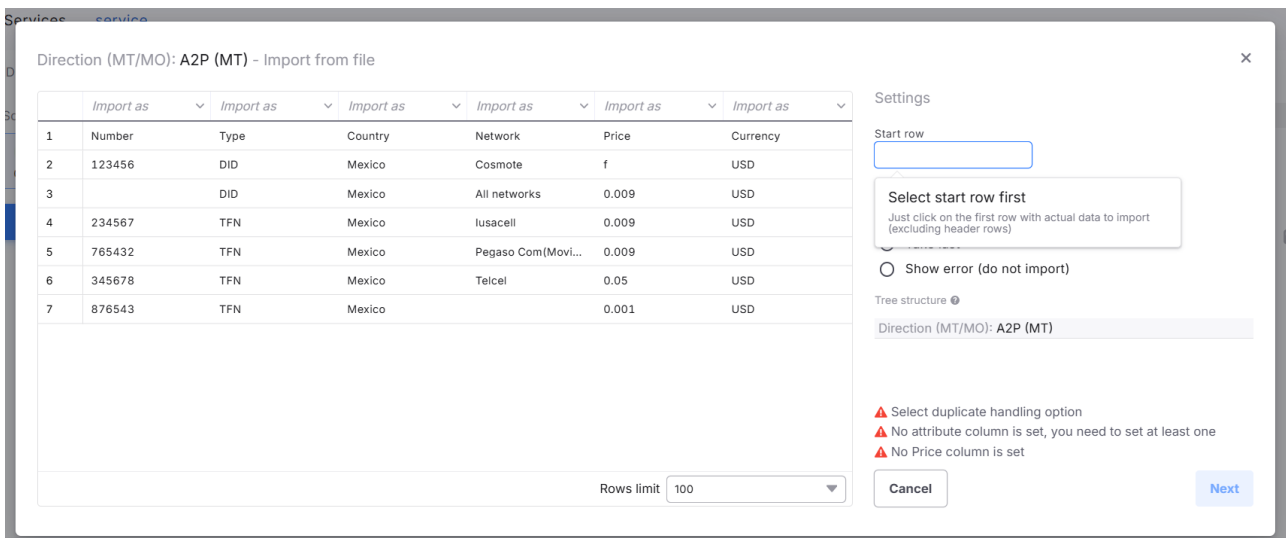


Uploading error

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](#)¹⁰⁴ that serves to preview the source file (left) and [Settings](#)¹⁰³ that serves to configure import settings (right). The window title displays the node of the rate tree to which the import is performed.



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

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;
 - *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.

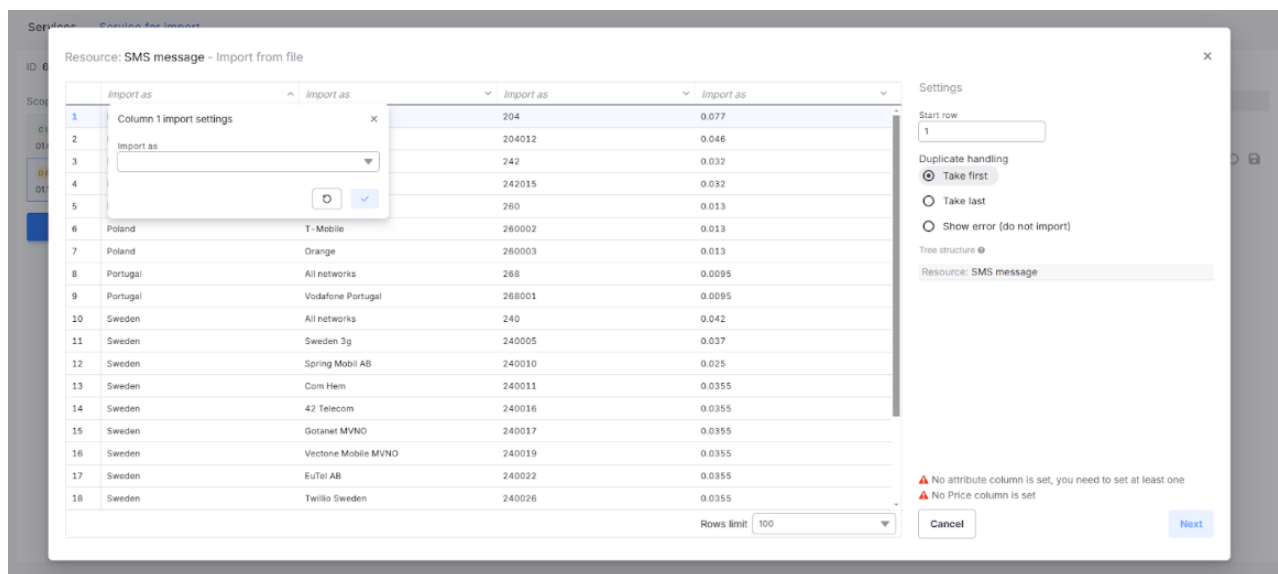
7.3.2.2.2 Resource panel

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

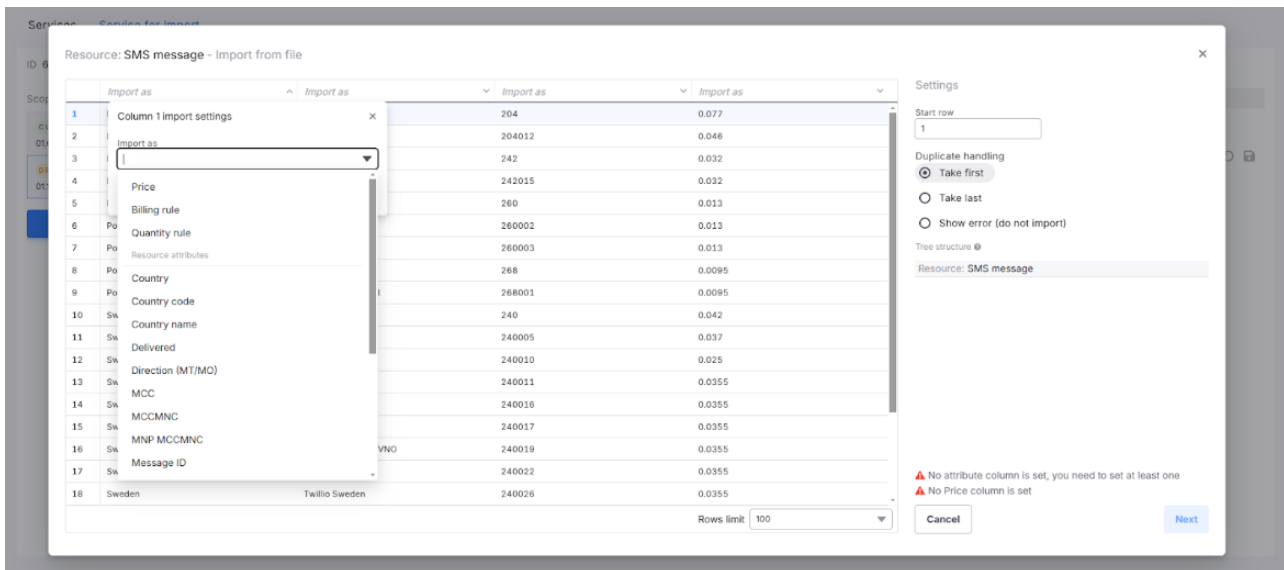
7.3.2.2.2.1 Configuring imported columns

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.



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.

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).

Resource: SMS message - Import from file

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

Column 3 import settings
Import as: Phone number

Settings
Start row: 1
Duplicate handling: Take first
 Take last
 Show error (do not import)
Tree structure: Resource: SMS message
No attribute column is set, you need to set at least one
No Price column is set

Dictionary is not associated with the resource attribute

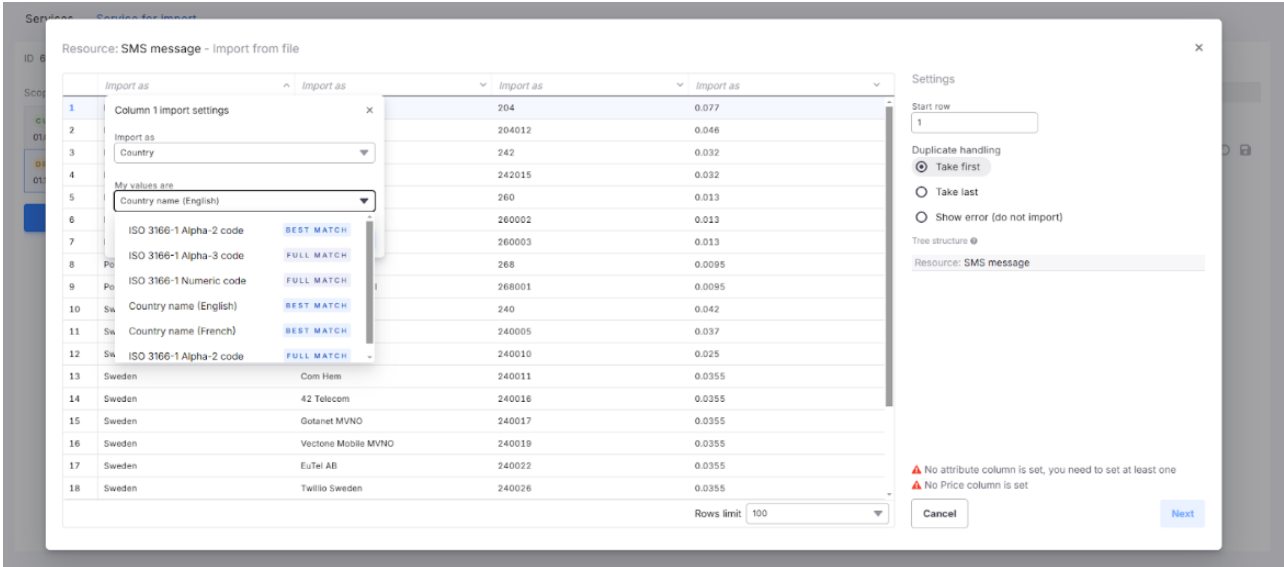
Resource: SMS message - Import from file

	Import as	Import as	Import as	Import as
1	Netherlands	All networks		
2	Netherlands	Telfort		
3	Norway	All networks		
4	Norway	eRate AS		
5	Poland	All networks		
6	Poland	T-Mobile		
7	Poland	Orange		
8	Portugal	All networks	268	0.0095
9	Portugal	Vodafone Portugal	268001	0.0095
10	Sweden	All networks	240	0.042
11	Sweden	Sweden 3g	240005	0.037
12	Sweden	Spring Mobil AB	240010	0.025
13	Sweden	Com Hem	240011	0.0355
14	Sweden	42 Telecom	240016	0.0355
15	Sweden	Gotanet MVNO	240017	0.0355
16	Sweden	Vectone Mobile MVNO	240019	0.0355
17	Sweden	EuTel AB	240022	0.0355
18	Sweden	Twilio Sweden	240026	0.0355

Column 3 import settings
Import as: MCMCNC
My values are: MCMCNC

Settings
Start row: 1
Duplicate handling: Take first
 Take last
 Show error (do not import)
Tree structure: Resource: SMS message
No attribute column is set, you need to set at least one
No Price column is set

Dictionary without dictionary attributes is associated with the resource attribute



Dictionary with dictionary attributes is associated with the resource attribute

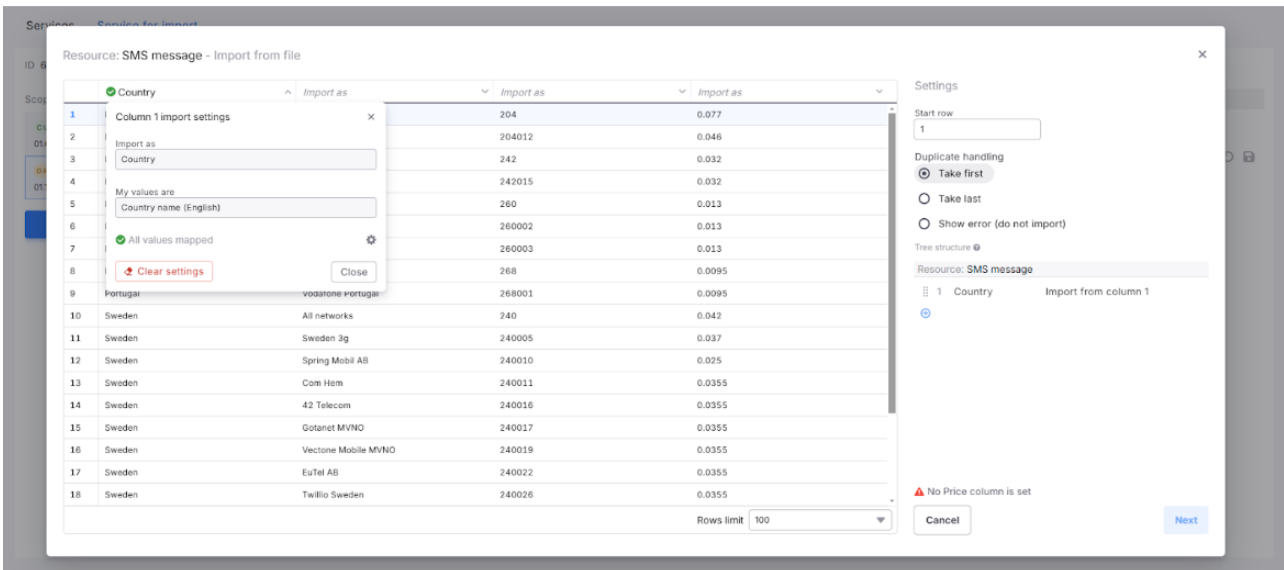
7.3.2.2.2 Automatic mapping

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.

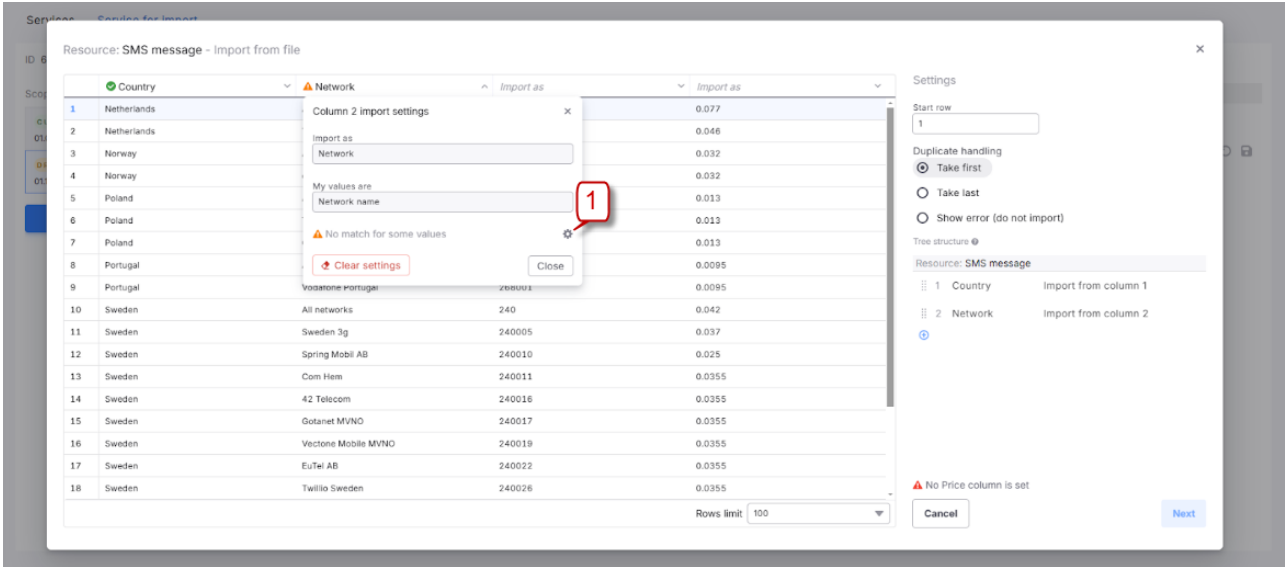
If mapping for a column with a resource attribute is successful, no further actions with the column are required:



Successful mapping of column values

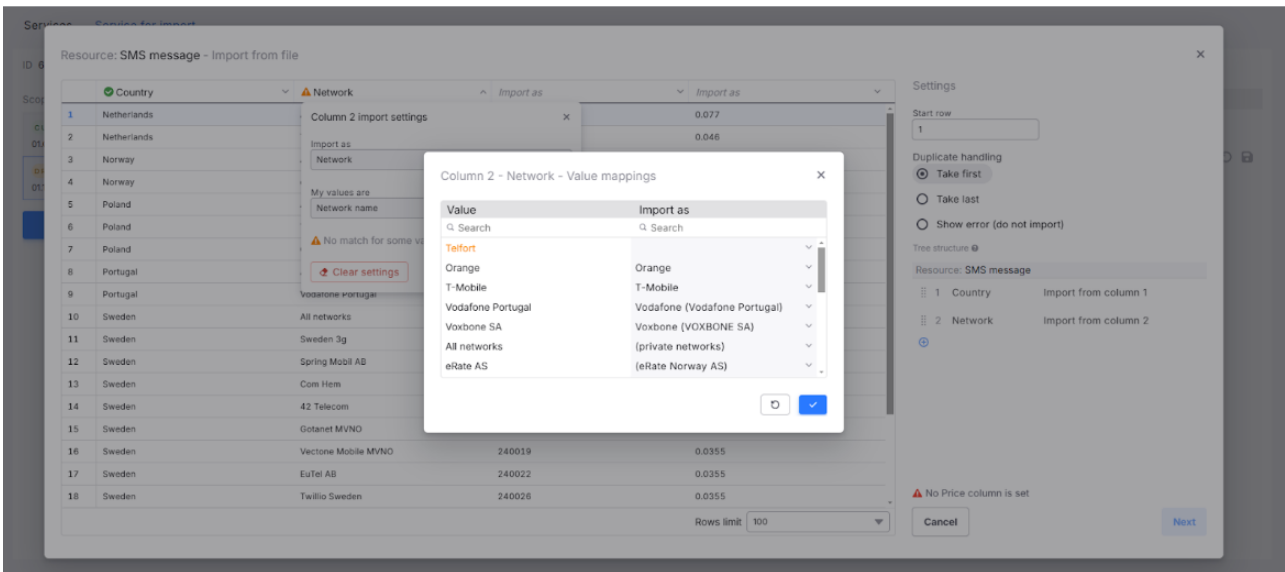
If no match was found for any of the column values in the dictionary with which the current resource attribute is associated, manual mapping can be performed for the unmapped values.

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:



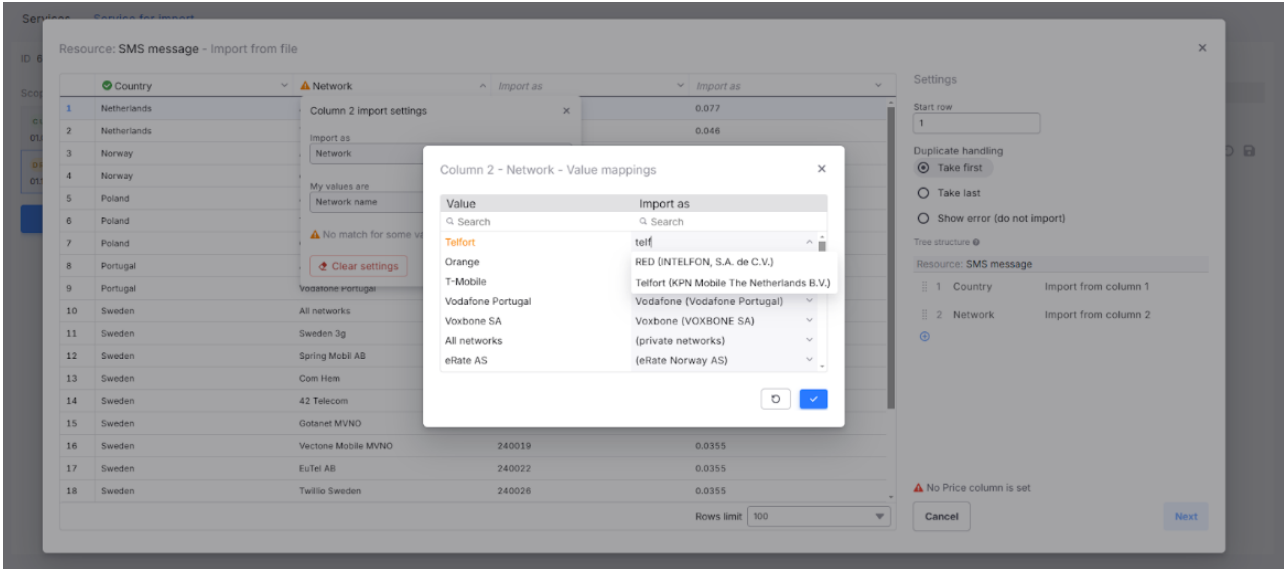
Automatic mapping found unmapped values

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.



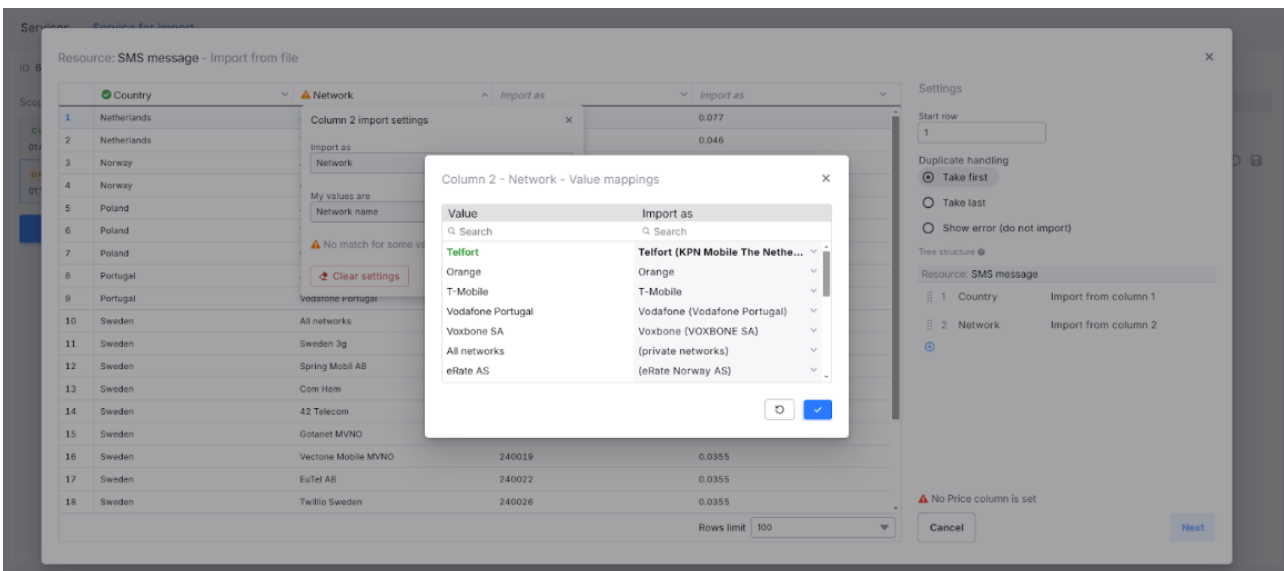
Manual mapping (1)

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



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).

7.3.2.2.2.4 Normalizing MCCMNC column values

TBD

7.3.2.2.2.5 Matching features

There are two types of matching:

- Full match - by equality (full match);

- 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.

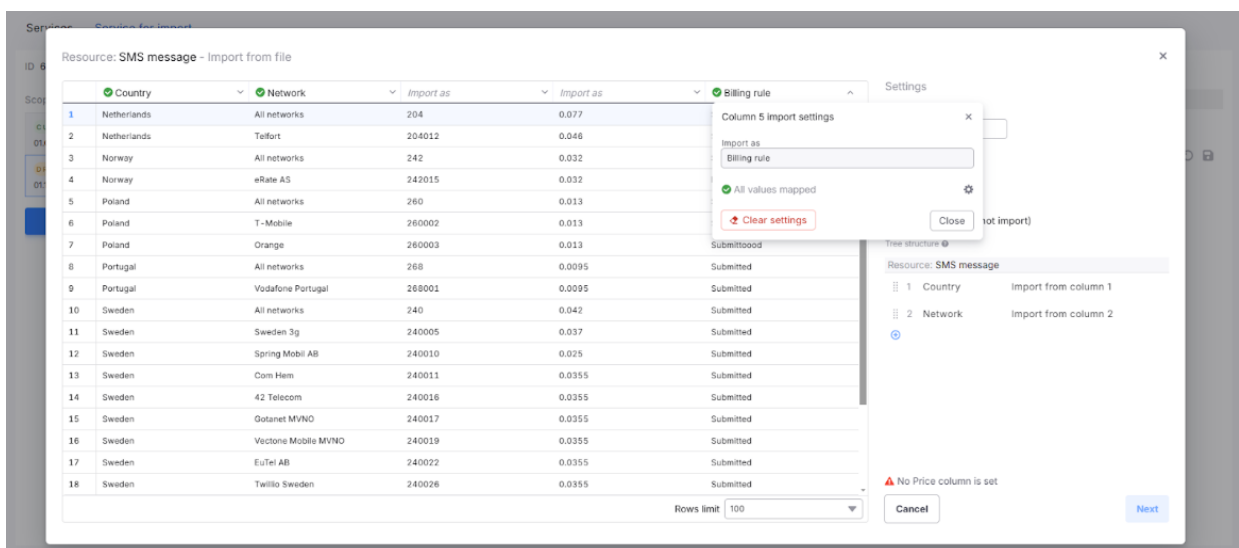
The best match search is applied for the *Billing rule* and *Quantity rule* properties: first the System tries to find a full match, if no match is found, the best match is searched.

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

- Submitted;
- Delivered.

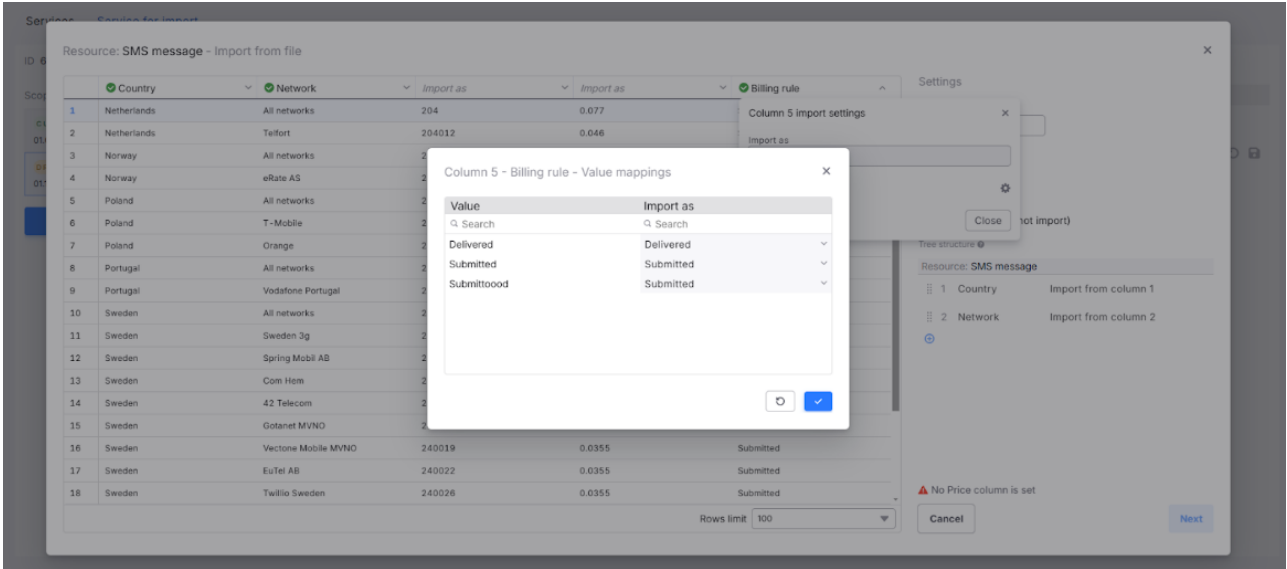
Specify the following values in the cells of the *Quantity rule* column:

- Messages;
- Segments.



ID	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	Gotanet 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)



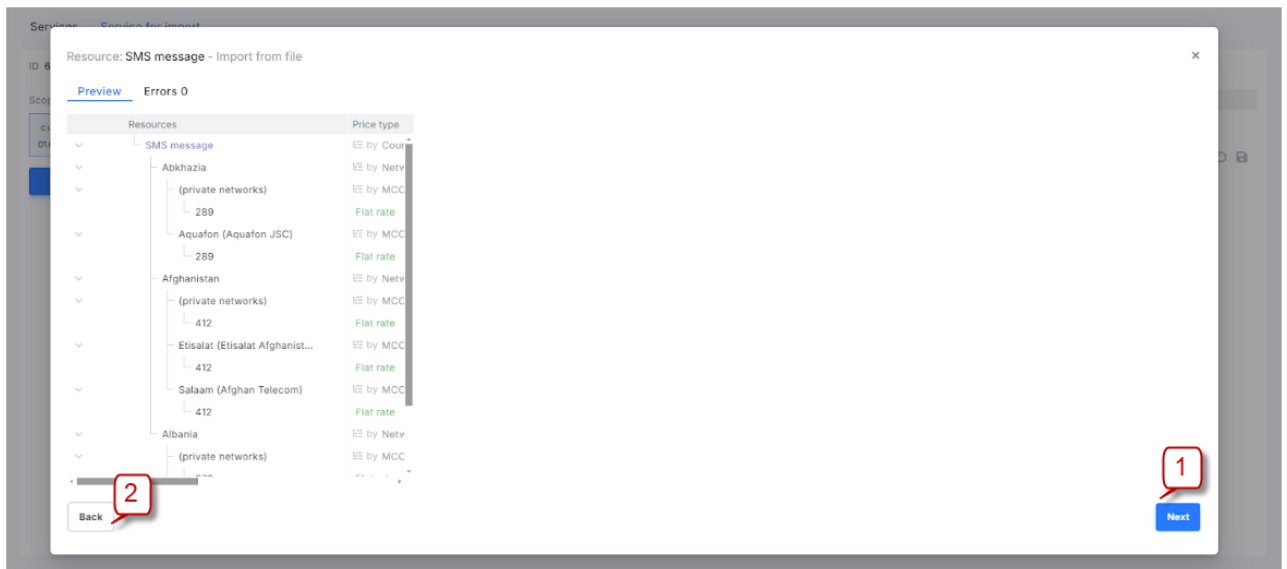
Automatic mapping for the Billing rule rate property (2)

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.

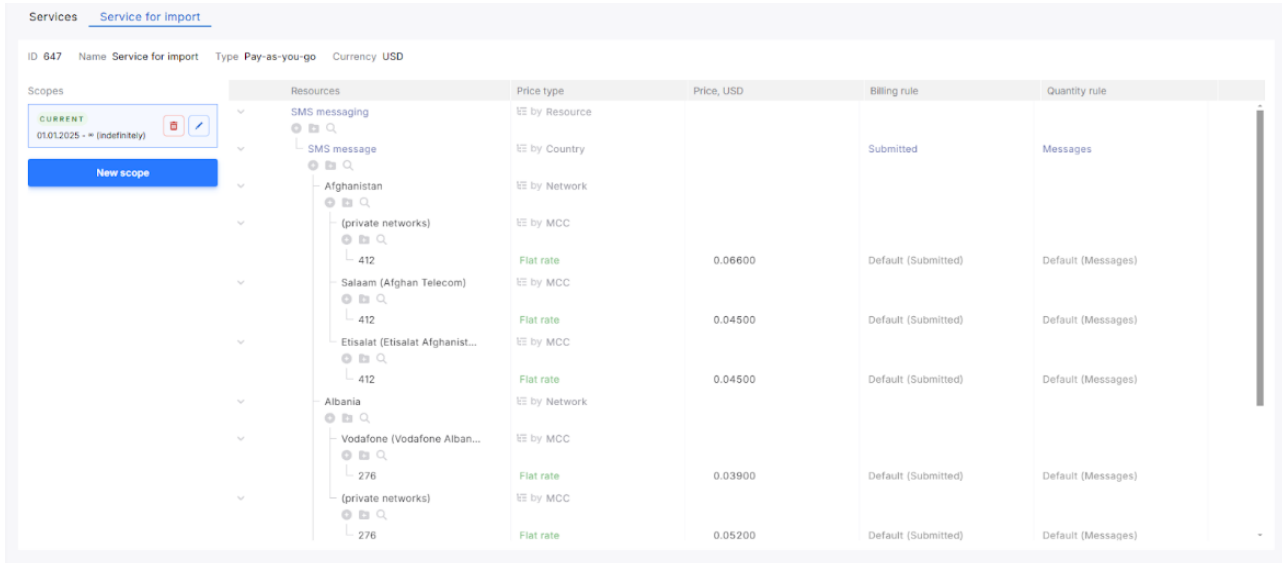


Import preview

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

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 service configuration page for 'Service for import' (ID 847, Type Pay-as-you-go, Currency USD). The interface displays a tree structure of resources and their associated rates. The 'Scopes' section shows a 'CURRENT' scope with a 'New scope' button. The 'Resources' section is expanded to show 'SMS messaging' and 'SMS message' nodes. The 'SMS message' node is further expanded to show 'Afghanistan' and 'Albania' nodes. The 'Afghanistan' node is expanded to show '(private networks)', 'Salaam (Afghan Telecom)', and 'Etisalat (Etisalat Afghanist...)' nodes. The 'Albania' node is expanded to show 'Vodafone (Vodafone Alban...)' and '(private networks)' nodes. The table below shows the details of the rates for these resources.

Resources	Price type	Price, USD	Billing rule	Quantity rule
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.

Add Service ×

*Name

*Type

*Currency

Description

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

Effective till

Copy rate tree from

[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*.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
<ul style="list-style-type: none"> SMS messaging <ul style="list-style-type: none"> SMS message 	<ul style="list-style-type: none"> by Resource by Direction (MT/MO) 		Submitted	Segments

Select Service domain





4. Configure traffic direction and country:

- Click  under *SMS message* and select *Attribute: P2A (MO)*. Select *Price type: Free*.
- Click  under *SMS message* and select *Attribute: A2P (MT)*. Select *Price type: Depends on Country*.
- Click  under *A2P (MT)* and select *Attribute: Spain*. Select *Price type: Depends on Network*.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
<ul style="list-style-type: none"> SMS messaging <ul style="list-style-type: none"> SMS message <ul style="list-style-type: none"> P2A (MO) A2P (MT) <ul style="list-style-type: none"> Spain 	<ul style="list-style-type: none"> 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:



- 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.
- 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.
- 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*.
- 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.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
<ul style="list-style-type: none"> Resources <ul style="list-style-type: none"> AZP (M1) <ul style="list-style-type: none"> Spain <ul style="list-style-type: none"> (Vodafone Spain) <ul style="list-style-type: none"> Others <ul style="list-style-type: none"> Others 	<ul style="list-style-type: none"> by Country by Network 	<ul style="list-style-type: none"> 0.04000 Tier <ul style="list-style-type: none"> 0.00500 1 000 0.00400 ∞ Sender ID <ul style="list-style-type: none"> 0.08000 Tier <ul style="list-style-type: none"> 0.05000 10 000 0.04000 50 000 0.03000 ∞ 	<ul style="list-style-type: none"> Default (Submitted) Default (Submitted) Default (Submitted) Default (Submitted) Default (Submitted) 	<ul style="list-style-type: none"> Default (Segments) 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)*.

Resources	Price type	Price, EUR	Billing rule	Quantity rule
<ul style="list-style-type: none"> A2P (MT) <ul style="list-style-type: none"> Spain <ul style="list-style-type: none"> (Vodafone Spain) <ul style="list-style-type: none"> Flat rate: 0.04000 DIGI mobil (Best Spain Tel... <ul style="list-style-type: none"> Scale: 0.00500 (1 000), 0.00400 (∞) Others <ul style="list-style-type: none"> Flat rate: 0.08000 Scale: 0.05000 (10 000), 0.04000 (50 000), 0.03000 (∞) 	<ul style="list-style-type: none"> by Country by Network by MNO by MNO 	<ul style="list-style-type: none"> 0.04000 Tier 0.08000 Tier 	<ul style="list-style-type: none"> Default (Submitted) Default (Submitted) Default (Submitted) Default (Submitted) 	<ul style="list-style-type: none"> Default (Segments) Default (Segments) Default (Segments) Default (Segments)
<ul style="list-style-type: none"> Sender ID setup fee <ul style="list-style-type: none"> Vodafone Spain <ul style="list-style-type: none"> Flat rate: 50.00000 Sender ID usage fee <ul style="list-style-type: none"> Vodafone Spain <ul style="list-style-type: none"> Flat rate: 10.00000 DIGI mobil <ul style="list-style-type: none"> Flat rate: 15.00000 	<ul style="list-style-type: none"> by MNO by MNO 	<ul style="list-style-type: none"> 50.00000 10.00000 15.00000 	<ul style="list-style-type: none"> Default Default Default (Default) Default (Default) 	<ul style="list-style-type: none"> Default Full period Default (Full period) 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:

- 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;

- 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

*Currency

Description








Add WhatsApp service





2. Configure the service scope as detailed in [Creating a service](#)⁹⁴. 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.

- 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	ES by Resource			
WhatsApp message	ES 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*.

- 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*.
- f. Click  under *Argentina* and select *Attribute: Others*. Select *Price type: Free*.

NOTE: The Others category is required, as the category is defined on the Meta side. 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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:
 - 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*.

- f. Click  under *Egypt* and select *Attribute: Others*. Select *Price type: Free*.

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

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.

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](#)⁹⁴. 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.

- 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*.
 - 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.
 - 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.
 - 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*.
 - 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.
 - 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.
 - 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.

Resources	Price type	Price, USD	Billing rule	Quantity rule
<ul style="list-style-type: none"> Resources <ul style="list-style-type: none"> RCS messaging <ul style="list-style-type: none"> RCS message <ul style="list-style-type: none"> Basic <ul style="list-style-type: none"> Spain Italy France Conversation <ul style="list-style-type: none"> Spain Italy France Single <ul style="list-style-type: none"> Spain Italy France Others 	<ul style="list-style-type: none"> by Resource by Billing event by Country by Country by Country by Country 	<ul style="list-style-type: none"> 0.04000 0.05000 0.03400 0.08000 0.08800 0.09000 0.09300 0.08900 1.00000 1.50000 	<ul style="list-style-type: none"> Delivered Delivered Default (Delivered) Default (Delivered) Default (Delivered) Default (Delivered) Default (Delivered) Default (Delivered) Default (Delivered) Default (Delivered) 	<ul style="list-style-type: none"> Messages Default (Messages) Default (Messages) Default (Messages) Default (Messages) Default (Messages) Default (Messages) Default (Messages) Default (Messages) 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:

- Create the pack service itself (no rate is added at this point).
- 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.
- 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*.

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

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 Country*.
- c. Select *Billing rule*: *Submitted*.
- d. Select *Quantity rule*: *Segments*.

Resources	Status	Billing rule	Quantity rule
<ul style="list-style-type: none"> SMS messaging <ul style="list-style-type: none"> SMS message 	by Resource		
<ul style="list-style-type: none"> SMS message <ul style="list-style-type: none"> United States of America (...) 	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
<ul style="list-style-type: none"> SMS messaging <ul style="list-style-type: none"> SMS message <ul style="list-style-type: none"> United States of America (...) 	by Resource		
<ul style="list-style-type: none"> SMS message <ul style="list-style-type: none"> United States of America (...) 	by Country	Submitted	Segments
<ul style="list-style-type: none"> United States of America (...) 	Included	Default (Submitted)	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**



***Type**

***Currency**

Description

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*.

4. 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*.
5. 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
<ul style="list-style-type: none"> Service purchase <ul style="list-style-type: none"> Unit pack <ul style="list-style-type: none"> USA SMS&WA Pack 	by Resource			
	by Pack		Default	Default
	Flat rate	100.00000	Default (Default)	Default (Default)

Configuring the resources tree

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

1. Go to [Account management\Enabled packs](#)³³. 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. 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](#)⁹⁴) 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.


5. Click *Save* to save the changes.

Add Enabled pack ✕

*Service (pack)
 USA SMS&WA Pack

*Agreement
 Hornes and Hooves Ltd - 1234 - (EUR)

*Effective from ⓘ Timezone
 Now  Europe/Moscow +03:00

Effective till ⓘ Timezone
 ∞ (indefinitely)  Europe/Moscow +03:00

*Billing
 Free of charge
 Charge

✔ 123.00 EUR
 Effective: 08.12.2023 00:00:00

Enabling the pack

7.3.7 Example 5. Creating a bundle pack

Suppose we need to create a bundle pack. Bundle pack serves to add additional charges for clients depending on the channel used when sending a message (each channel from the pack is separately billed).

Suppose the bundle pack will have the following parameters:

- Channels: SMS and WhatsApp;
- Pack price: 100 EUR
- Limit: 100;
- Price: 0.2 EUR;
- Usage: 200.

In case 200 SMS (the Usage parameter) have been sent, 100 SMS are included in the pack and the remaining 100 are billed as indicated in the Price parameter (0.2). The client will be charged 20 EUR.

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

*Type

Description

Cancel

Save

Add Bundle Initiator service

- Configure the service resources and destinations as detailed in [Creating a service](#)⁹⁴. You may leave it in the *Draft* status to define the validity period later. Click *Save* to open the *Resources tree*.

Resources	Status
<ul style="list-style-type: none"> ▼ SMS messaging <ul style="list-style-type: none"> + - Q <ul style="list-style-type: none"> SMS message Included 	<ul style="list-style-type: none"> ☰ by Resource <ul style="list-style-type: none"> SMS message Included
<ul style="list-style-type: none"> ▼ WhatsApp messaging <ul style="list-style-type: none"> + - Q <ul style="list-style-type: none"> WhatsApp message Included WhatsApp conversation Included 	<ul style="list-style-type: none"> ☰ by Resource <ul style="list-style-type: none"> WhatsApp message Included WhatsApp conversation Included

Create scope

- Create a new *Bundle pack* service.

Add Service ×

*Name

*Type

*Size

Description

Add Bundle Pack service

- Configure the bundle initiator 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*.

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 pack price:

- 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

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.

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](#)³³. 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.

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](#)³⁶. 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.

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](#)³⁸. 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.

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** 1

***Agreement** 2

Description 3

***Fee type** 4

***Pre rated cost** 5

6

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.

Additional fee ✕

*Company: *Agreement:

Description:

*Fee type: 1

Additional service: 2 *Volume: 3

✓ 5 EUR 4
Effective: 2024-09-01 00:00:00 +0000 UTC - ∞

5

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.

EDR Rerate 1

5 Filters 2 Columns 3 + Add rerate task

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

1. 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*.
2. Click to customize the display of columns.
3. Click *Add rerate task* to add a new task.

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

Task ID: 191

1 EDR details		2 Session details		3 Reseller CDR details	
2	2	2	2	0	0
Estimated	Processed	Processed	Updated	Processed	Created
2	0	0		0	0
Updated	Failed	Failed		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.


Add EDR rerate task




1

*Time from  *Time till 


2

*Company 

3

Agreement 


4

Channel 


5

Recalculate session billing

6

Scheduled for 

7

 Estimated count of entities: 0

Add EDR rerate task

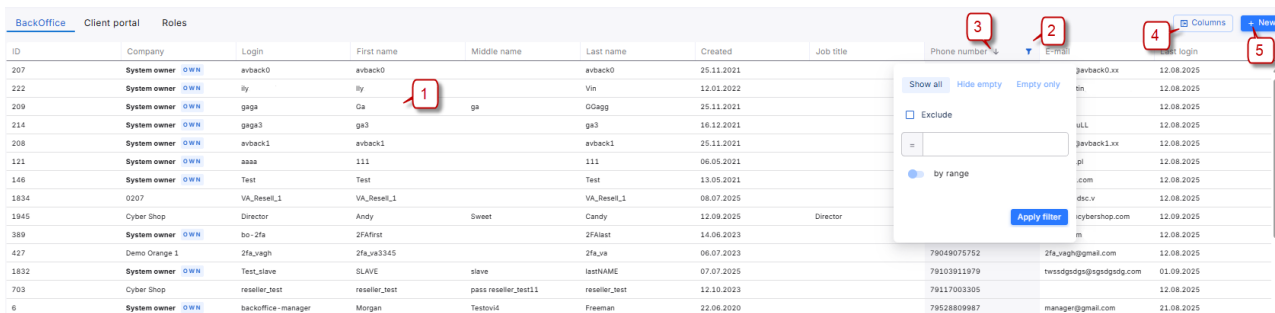
1. Select the EDR rerating period.
2. Select the company or companies.
3. Select the appropriate agreement.
4. Select the channel(s).
5. Select the checkbox to recalculate session billing.
6. Enter the date or leave blank to start the task instantly.
7. Click *Save* to save the changes or *Cancel* to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

8 Users

The *Users* interface serves to create and manage BackOffice and Client portal users and their roles. It contains three subinterfaces: [BackOffice](#)¹⁴², [Client portal](#)¹⁴⁶ and [Roles](#)¹⁵².

8.1 BackOffice

The *BackOffice* tab serves to create and manage BackOffice users.



ID	Company	Login	First name	Middle name	Last name	Created	Job title	Phone number	E-mail	Last login
207	System owner	avback0	avback0		avback0	25.11.2021			javback0.xx	12.08.2025
222	System owner	ly	ly		Vin	12.01.2022			tin	12.08.2025
209	System owner	gaga	Ga	ga	OGagg	25.11.2021				12.08.2025
214	System owner	gaga3	ga3		ga3	16.12.2021			uLL	12.08.2025
208	System owner	avback1	avback1		avback1	25.11.2021			javback1.xx	12.08.2025
121	System owner	aaaa	111		111	06.05.2021			pl	12.08.2025
146	System owner	Test	Test		Test	13.05.2021			com	12.08.2025
1834	0207	VA_Resel_L1	VA_Resel_L1		VA_Resel_L1	08.07.2025			dbc.v	12.08.2025
1845	Cyber Shop	Director	Andy	Sweet	Candy	12.09.2025	Director		cybershop.com	12.09.2025
389	System owner	bo-2fa	2FAfirst		2FAlast	14.06.2023			m	12.08.2025
427	Demo Orange 1	Zfa_vagh	Zfa_vag3345		Zfa_vg	06.07.2023		79049075752	Zfa_vagh@gmail.com	12.08.2025
1832	System owner	Test_slave	SLAVE	slave	lastNAME	07.07.2025		79103911979	twssdgdg@gsgdgdg.com	01.09.2025
703	Cyber Shop	reseller_test	reseller_test	pass reseller_test11	reseller_test	12.10.2023		79117003305		12.08.2025
6	System owner	backoffice-manager	Morgan	Testovid	Freeman	22.06.2020		7952809987	manager@gmail.com	21.08.2025

BackOffice

1. Click on the record in the table to view user.
2. Click to filter the records in the table.
3. Click to apply ascending or descending order.
4. Click to customize the display of columns.
5. Click *New* to create a user. The form contains two tab sheets: *General* for user settings and *Role* for defining the user's rights.

Add User

General Role

*Company 1
VA_Resell_1

*Login 2
Director 3

*Password 4 *Re-type password
.....

*First name Middle name
Andy Sweet

*Last name Birthday
Candy 01.01.1981

Job title 5
Director

*Phone number *E-mail 6
876543211 director@varesell1.com

Country 7 *Language 8
Hungary English

Timezone 9
Europe/Budapest

Two factor authentication 10

Enabled 11

12

Cancel Save

Add User

Configure the following fields in the *General* tab:

1. *Company*: select the company name.
2. *Login*: type the login name.
3. *Password*; *Re-type password*: type the password (twice).
4. *First name*, *Middle name*, *Last name*, *Birthday*: supply the user's first, middle and last names and the birthday.
5. *Job title*: type in the job title.
6. *Phone number*, *Email*: provide the contact number and email.
7. *Country*: select the country from the drop-down list.
8. *Language*: select the default interface language.
9. *Timezone*: select the timezone from the drop-down list.

10. *Two-factor authentication*: select to enable two-factor authentication. Note that for the feature to work, the *Phone number* field must contain a valid phone number.
11. *Enabled*: select the checkbox to give the user access to the interfaces.
12. Click *Save* to save the changes or *Cancel* to discard the settings.

Configure the roles and permissions in the *Role* tab:

Add User X

General
Role

No restrictions 1
Allows the user to have unrestricted access to all objects and actions

***Role** 2

CLIENT MANAGER X
☰

Permissions 3

The areas of system this user can view or manage

Export (1 of 1) ▼

Account management (13 of 13) ▼

Finance (1 of 5) ▲

Name	View	None	Manage
Payments	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Invoices and charges	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Services	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Additional fees	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
EDR Rerate	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

MCCMNC (1 of 1) ▼

Users (0 of 2) 4

Cancel
Save

Role

1. *No restrictions*: allows the user to have unrestricted access to all interfaces.
2. *Role*: the role assigned to the user. Use the drop-down list to assign a predefined role or start typing a custom role.

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

3. *Permissions*: user permissions associated with the role that allow to view or manage BackOffice interfaces. Possible options are: *View*, *None* and *Manage*.
4. Click *Save* to save the changes or *Cancel* to discard the settings.

NOTE: Once a role is added to a user, that user must log out and log in for the role to take effect.

To edit a BackOffice user, double click on their record in the table. In the view window that appears, click *Edit* (1).

View User ID 1945 ✕

General Role

Company
Cyber Shop

Login
Director

Password 👁 Re-type password 👁

First name
Andy Middle name
Sweet

Last name
Candy Birthday
01.01.1981 📅

Job title
Director

*Phone number
1234567889 E-mail
director@cybershop.com

Country
Hungary Language
English

Timezone
Europe/Budapest

Two factor authentication

Enabled

Delete Cancel Edit

View User

Edit User ID 1945 ×

General Role

*Company
Cyber Shop

*Login
Director

Password
Create a password

Re-type password
Type password again

*First name
Andy

Middle name
Sweet

*Last name
Candy

Birthday
01.01.1981

Job title
Director

*Phone number
1234567889

*E-mail
director@cybershop.com

Country
Hungary

*Language
English

Timezone
Europe/Budapest

Two factor authentication

Enabled

Delete

Cancel Save

1

2

3

Edit User

1. Edit the *General* and *Role* configurations as appropriate.
2. Click *Delete* to delete the record.
3. Click *Save* to save the record or *Cancel* to discard the settings.

8.2 Client portal

The *Client portal* tab serves to create users for the Client portal. It is organized similar to the *BackOffice* section. Users created here with the Admin role are granted full access to the Client portal interfaces. They, in turn, can create users in the Client portal and assign them various sets of permissions in the System. You can also add a specific set of permissions to a user here.

BackOffice		Client portal				Roles										
ID	Company	Login	First name	Middle name	Last name	Created	Job title	Phone number	E-mail	Last login						
1287	r3fref2efr	r3fref2efr	r3fref2efr		r3fref2efr	15.10.2024										
1041	test_others	test_others	azaz		AZ	13.06.2024			tesu@test.com	12.08.2025						
714	company_company	hjkjkjkjkj	nnnn		ssss	17.10.2023			sddf@asda.com	12.08.2025						
1294	VA_123_va189	VA_123_va189	VA_123_va189		VA_123_va189	15.10.2024			3454	12.08.2025						
1270	test1	fggdfggdfg	fggdfggdfg		fggdfggdfg	14.10.2024			53534	12.08.2025						
1349	VVA	VVA_a1	VVA_a1		VVA_a1	25.10.2024			VVA_a1@gmail.com	12.08.2025						
1350	VVA	VVA_a2	VVA_a2		VVA_a2	25.10.2024			VVA_a2@gmail.com	12.08.2025						
1001	VVA	ev-vva1	ev-vva1		ev-vva1	12.04.2024			ev-vva1@localost.local	12.08.2025						

Client portal tab

1. Click on the record in the table to view user.
2. Click to filter the records in the table.
3. Click to apply ascending or descending order.
4. Click to customize the display of columns.
5. Click *New* to create a user. The form contains two tab sheets: *General* for user settings and *Role* for defining the user's rights.

Add User ×

General Role

*Company 1
 VA_Resell_1

*Login 2
 User

*Password 3

*Re-type password

*First name
 Andy

Middle name
 Sweet 4

*Last name
 Candy

Birthday
 01.01.1981

Job title 5
 Manager

*Department 6
 First line support

*Phone number
 87654321

*E-mail 7
 asc@varesell1.com

Country 8
 Hungary

*Language 9
 English

Timezone 10
 Europe/Budapest

Two factor authentication 11

Enabled 12

13

Cancel Save

Add User

Configure the following fields in the *General* tab:

1. *Company*: select the company name.
2. *Login*: type the login name.
3. *Password*; *Re-type password*: type the password (twice).
4. *First name*, *Middle name*, *Last name*, *Birthday*: supply the user's first, middle and last names and the birthday.
5. *Job title*: type in the job title.
6. *Department*: the company department which the user is part of. Depending on the department that the user belongs to, the conversations in the Client portal *Conversations* interface will be restricted/available to the user. The following departments are available:

- *Admin*: administrative department, has access to all conversations.
- *First line support*: technical support department, has access to a limited number of conversations.

NOTE: To create a new department, type its name in the *Department* field and click the *Create new* button that appears. New departments are created by an *Admin* user.

7. *Phone number, Email*: provide the contact number and email.
8. *Country*: select the country from the drop-down list.
9. *Language*: select the default interface language.
10. *Timezone*: select the timezone from the drop-down list.
11. *Two-factor authentication*: select to enable two-factor authentication. Note that for the feature to work, the *Phone number* field must contain a valid phone number.
12. *Enabled*: select the checkbox to give the user access to the interfaces.
13. Click *Save* to save the changes or *Cancel* to discard the settings.

Configure the user's roles and permissions in the *Role* tab:

Add User ×

General Role

No restrictions 1
 Allows the user to have unrestricted access to all objects and actions

*Role

BROADCAST MANAGER X 2

Permissions 3

The areas of system this user can view or manage

Export (0 of 1)				▼
Dashboard (1 of 1)				▼
Broadcast (1 of 1)				▲
Name	View	None	Manage	
Broadcast	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Contacts (3 of 3)				▼
Conversations (2 of 2)				▼
Finance (1 of 3)				▼
Statistics (2 of 4)				▼
Assets (5 of 5)				▼
Users (0 of 1)				▼ 4

Cancel

Save

Role

1. *No restrictions*: allows the user to have unrestricted access to all interfaces.
2. *Role*: the role assigned to the user. Use the drop-down list to assign a predefined role or start typing a custom role.
3. *Permissions*: permissions associated with the role that allow to view or manage Client portal interfaces. Possible options are: *View*, *None* and *Manage*.
4. Click *Save* to save the changes or *Cancel* to discard the settings.

Double click on the record in the table and click *Edit* (1) in the *View User* window that appears to edit a Client portal user.

View User ID 1391



General Role

Company

VA_reseller_1

Login

VA_reseller_1_m

Password

Re-type password

First name

VA_reseller_1_m

Middle name

Last name

VA_reseller_1_m

Birthday

Job title

Department

First line support

Phone number

E-mail

VA_reseller_1_m@gmail.com

Country

Language

English

Timezone

Etc/UTC

Two factor authentication

Enabled

Delete

Cancel

Edit



View User

Edit User ID 1391

General Role

1

*Company
VA_reseller_1

*Login
VA_reseller_1_m

Password
Create a password

Re-type password
Type password again

*First name
VA_reseller_1_m

Middle name

*Last name
VA_reseller_1_m

Birthday
DD.MM.YYYY

Job title
Enter user's job title

*Department
First line support

Phone number
Enter user's phone #

*E-mail
VA_reseller_1_m@gmail.com

Country
Select country

*Language
English

Timezone
Etc/UTC

Two factor authentication

Enabled

2 Delete

3 Cancel Save

Edit User

1. Edit the *General* and *Role* configurations as appropriate.
2. Click *Delete* to delete the record.
3. Click *Save* to save the record or *Cancel* to discard the settings.

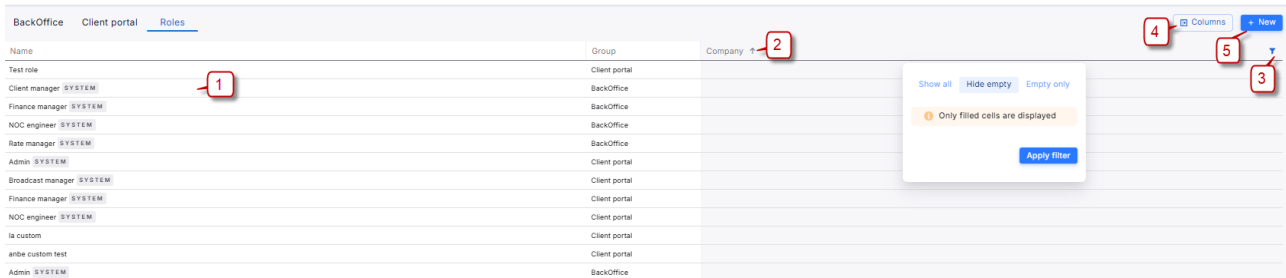
NOTE: Once a role is added to a user, that user shall log out and log in for the role to take effect.

8.3 Roles

The *Roles* tab serves to view and configure user roles and permissions. 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 roles for BackOffice and Client portal users.

The following predefined roles are available:

- *Admin*: user with full access to all interfaces and System functionality.
- *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.



Name	Group	Company
Test role	Client portal	
Client manager SYSTEM	BackOffice	
Finance manager SYSTEM	BackOffice	
NOC engineer SYSTEM	BackOffice	
Rate manager SYSTEM	BackOffice	
Admin SYSTEM	Client portal	
Broadcast manager SYSTEM	Client portal	
Finance manager SYSTEM	Client portal	
NOC engineer SYSTEM	Client portal	
la custom	Client portal	
anbe custom test	Client portal	
Admin SYSTEM	BackOffice	

Roles tab

1. Click on the record in the table to view role.
2. Click to apply ascending or descending sorting.
3. Click to filter the records in the table.
4. Click to customize the display of columns.
5. Click *New* to create a new role.

Add Role X

***Name** 1

 8 / 40

Description 2

***Group** 3

Client portal ▼

Template 4

Admin ▼

Company 5

VA_RESELL_1 X Select... ☰

***Permissions** 6

Select the areas of system this user can view or manage

Export (1 of 1) ▼
Dashboard (1 of 1) ▼
Broadcast (1 of 1) ▼
Contacts (3 of 3) ▼
Conversations (2 of 2) ▼
Finance (3 of 3) ▼

Cancel
Save

Add Role

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:
 - *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 functionality.
- *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 functionality.
- *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: System roles are not editable.

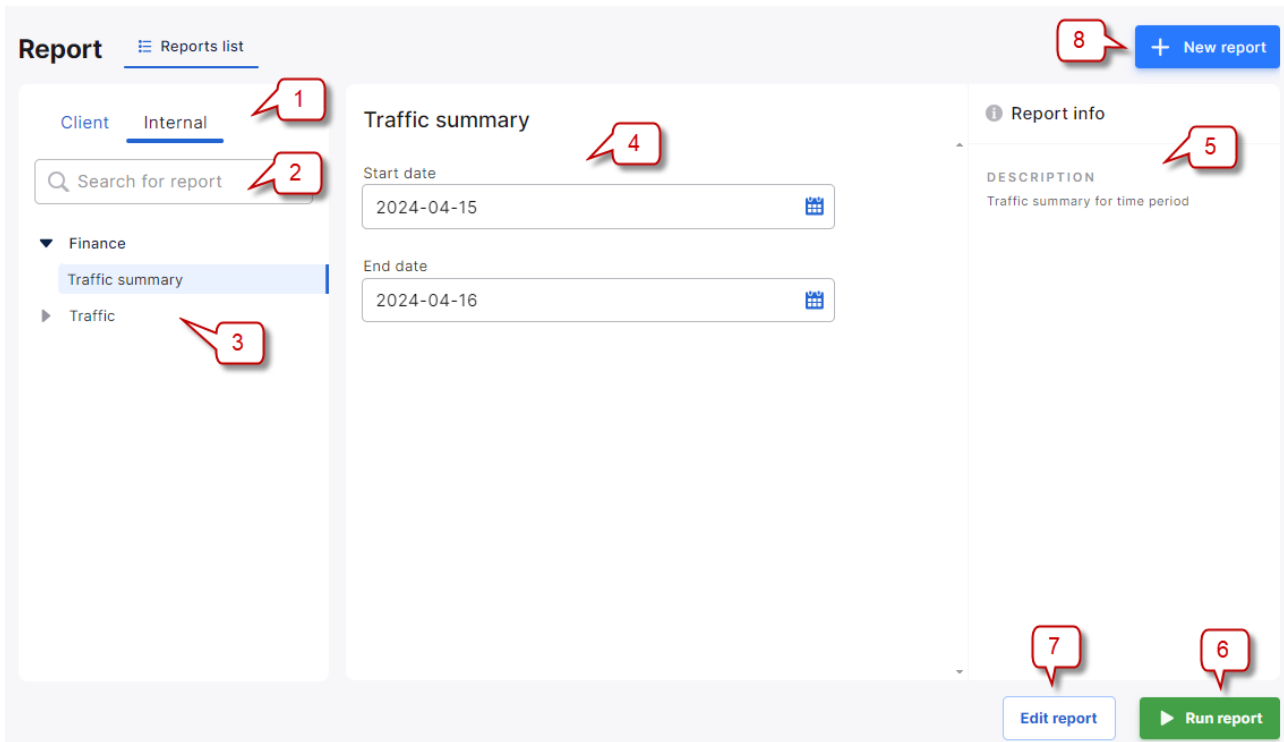
NOTE: After a custom role is created it will appear in the drop-down list of template roles.

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

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.



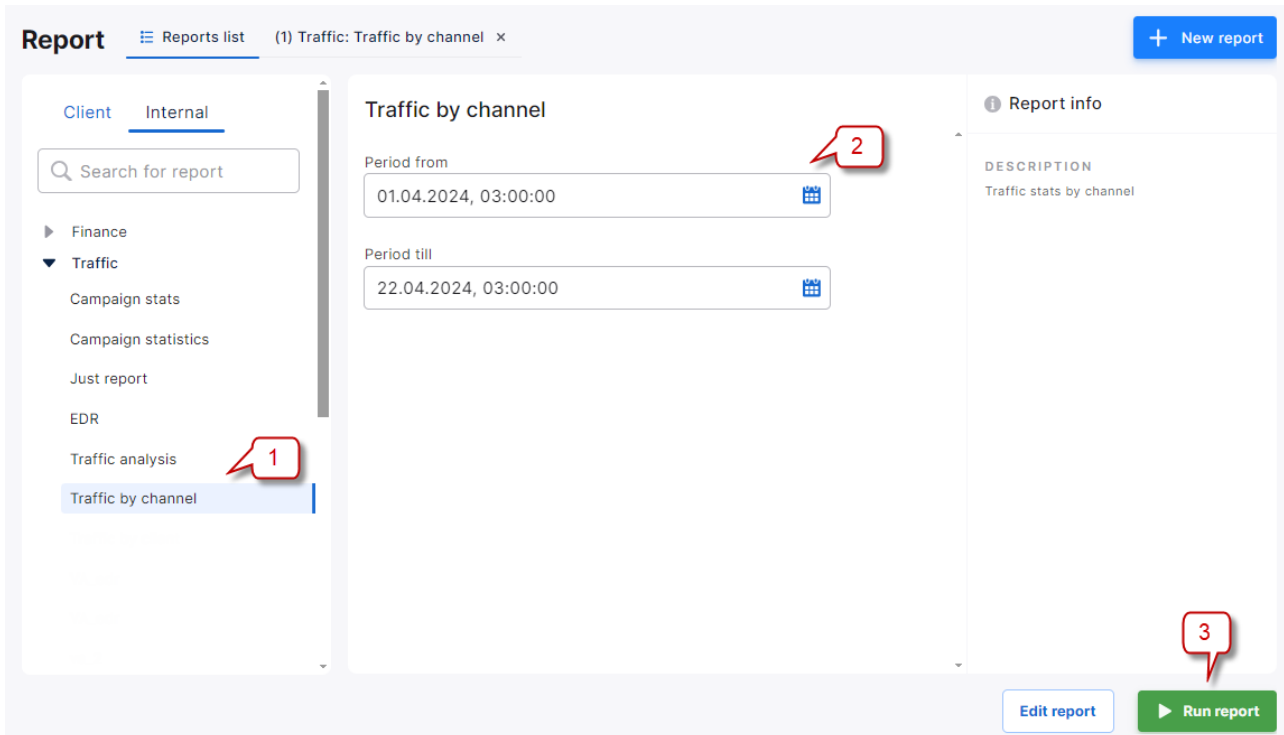
Reports page

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.

9.1 Running a report

To run a report, proceed as follows.



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.

Report | Reports list | (1) Traffic: Traffic by channel x

channel_type	Channel	Total MT	Sent	Delivered	Seen	Total MO	
1	SMS		117	116	63	0	1
2	RCS		8	3	3	3	7
4	WhatsApp		22,300	20,055	19,004	11,407	0
8	Unknown (D 8)		3	1	1	1	0
	[TOTAL]		22,428	20,175	19,071	11,411	8

1

CSV file

Export report as ...

Page 1 of 1 | Show 100 | Rows 1-5 of 5

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* .

Create new report

*Report name: Campaign stats (1)

*Categories: TRAFFIC X (2)

Description: Campaign statistics (3)

Available to clients (4)

*SQL Query (5)

```

1 select
2 format
3 (
4   "with s as
5   (
6     select
7       f.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 0 then "In progress" when 1 then "Complete" when 2 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 "✓" end sent,
14      case when ping_is_delivered then "✓" end delivered,
15      case when ping_is_seen then "✓" when pong_phone_number is not null or array_length(btn.tbl, 1) > 0 then "✓" end opened,
16      case when pong_phone_number is not null or array_length(btn.tbl, 1) > 0 then "✓" end interacted,
17

```

Parameters (6)

+ Add new parameter to report

CAMPAIGN(S) (7)

Parameter type	Value
Required	<input checked="" type="checkbox"/> Yes
Name	Campaign(s)
Bind name	broadcast_run_id
Default	
Description	Campaign name
Data SQL query	VIEW / EDIT

8

Cancel Save

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.

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*
 - *Month and year*
 - *Year*
 - *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 whose names start 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.
8. Click *Save* to save the changes.

10 Notifications settings

The *Notifications settings* section serves to view internal notifications sent to the users. By default, all notifications go to the emails specified in the *Account emails* field when creating an agreement.

Channel	Event	Text	Variable	Additional emails
Email		Your payment {{.paymentAmount}} {{.currency}} has been successful...	paymentAmount, currency	
Email		Your Sender ID {{.sender_name}} is activated.	sender_name	
Email		Notification body (font-family: Arial, sans-serif; font-size: 16px; lin...		
Email		Dear {{.last_name}} {{.first_name}}, Thanks for registering at our por...	last_name, first_name, activation_link	
Email		Dear Team. Report about problem: {{.text}} Email for feedback: {{.em...	text, email	
Email		Password Reset Notification body (font-family: Arial, sans-serif; fo...	recipient_name, company_name, reset_link	

Notifications settings

1. *Channel*: the notification delivery channel.
2. *Event*: the notification name.
3. *Text*: the notification template. The below templates are available in the System:
 - a) Your payment {{.paymentAmount}} {{.currency}} has been successfully completed. (The notification is sent when a customer has made a payment through the PSP online payment system.)
 - b) Your Sender ID {{.sender_name}} is activated. (The notification is sent when a sender's status have become *Active* status and is available for use in mailings.)
 - c) This is a notification to inform you that you need to moderate messages. Thank you! (The notification is sent after mailing list/chatbot moderation has been enabled for a client company.)
 - d) Password Reset Notification. (The email template that is sent when a user requests to reset their login password.)
 - e) Dear {{.last_name}} {{.first_name}}, Thanks for registering at our portal! Please follow this link: {{.activation_link}} and activate your account. (The notification (email) template that is sent to a client that has successfully completed the self-registration.)
 - f) Dear Team. Report about problem: {{.text}} Email for feedback: {{.email}}. (The template is used to send a report to the support team about problems encountered during self-registration.)
4. *Variable*: a variable that is used in the template.
5. *Additional emails*: the additional notification recipients.
6. Click to customize the display of columns.

NOTE: For configuring customized notification templates, contact your BackOffice supplier.

Click on the entry in the table to *View Notification scenario*.

View Notification scenario



Type
@ Email

Text
Your payment {{.paymentAmount}} {{.currency}} has been successfully completed.

Event

Default emails
Accounts emails

Additional emails

2

3

1

Cancel Edit

View Notification scenario

1. Click *Edit* to edit the record.
2. Enter additional emails separated by a comma.
3. Click *Cancel* to close the tab or discard the changes.

NOTE: A user can edit only the *Additional emails* field, for configuring other fields contact your BackOffice supplier.

11 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](#)^[39]).
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.

11.1 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.

Add Vendor SMPP Connection ✕

***Name** 1

Company IDs 2

***Host name** 3 ***Port** 4

***System ID** 5 ***Password** 6

System type 7 **SSL type** 8

Limits 9

RPS limit 10 **Window limit** 11

TLV used 13 **Inverted address mode** 12

Statuses map

Disable SMPP connection 14

15

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 and port as given by the provider.
4. *Port*: supply the hostname and 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.

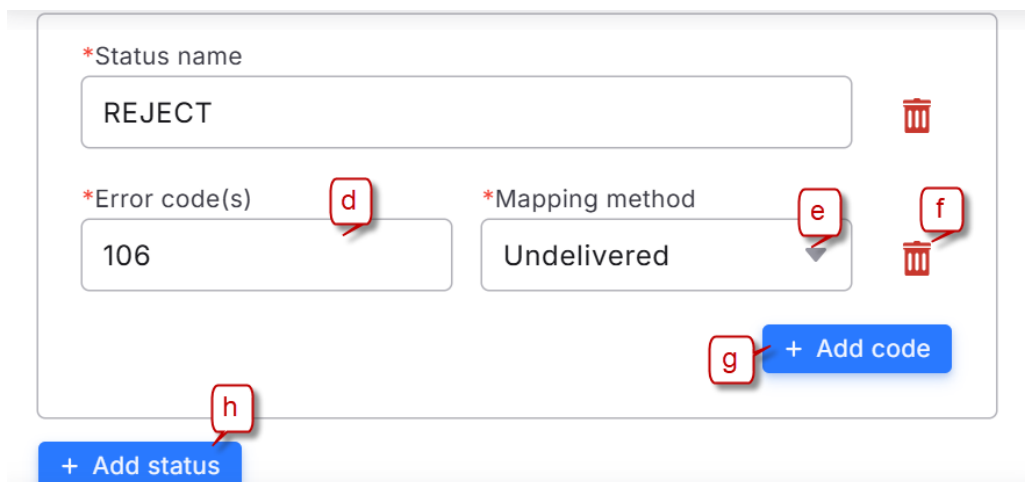
7. *System type*: provided by the SMPP vendor.
8. *SSL type*: provided by the SMPP vendor.
9. *Limits*: select the checkbox to specify connection limits.
10. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender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



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.



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.

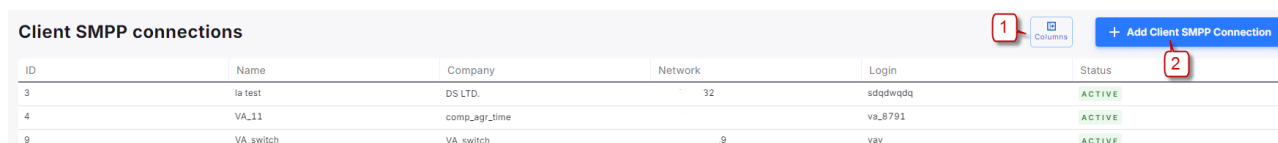
NOTE: Multiple error codes and mapping methods can be specified for a status name.

- 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.

11.2 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.



ID	Name	Company	Network	Login	Status
3	ls-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.

Add Client SMPP Connection ×

*Name 1

Client connection

*Company 2

VA_reseller_1

*Network 3

Network

*Login 4 *Password 5

HT 123456

System type 6 *SSL type 7

Enter value SSLv23 / TLSv1.3

*Default datacoding 8

GSM 7 Bit

Disable SMPP connection 9

10

Cancel Save

Add Client SMPP Connection

1. *Name*: add an arbitrary connection name.
2. *Company*: select the name of the company.
3. *Network*: supply the Client SMSC IP address.
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.

11.3 HTTP connections

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

Starting from version 1.16.0 to add a new connection:

1. Create a connection to the vendor 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.

ID	Name	Signature key	Status	Vendor type
213	360Cloud Emulator		ACTIVE	Dialog360 Cloud
227	Telin_newapi		ACTIVE	Telin
469	Telin_newapi_real		ACTIVE	Telin NeuAPIX
470	Telin_NeuapiX Emulator		ACTIVE	Telin NeuAPIX
498	Default Transit SMS		ACTIVE	Transit SMS
499	Default Transit Viber		ACTIVE	Transit Viber
500	Default GSM4 Transit		ACTIVE	GSM4 Transit
501	Default Google RBM		ACTIVE	Google RBM

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.

11.3.1 Viber

Add HTTP connection ✕

*Name 1

HTTP 1

*Vendor type 2

Viber

Vendor URL 3

http://

*Service id 4

123 5

Limits 6

RPS limit

10

Window limit 7

10 8

Disable HTTP connection 9

Cancel
Save

Viber connection

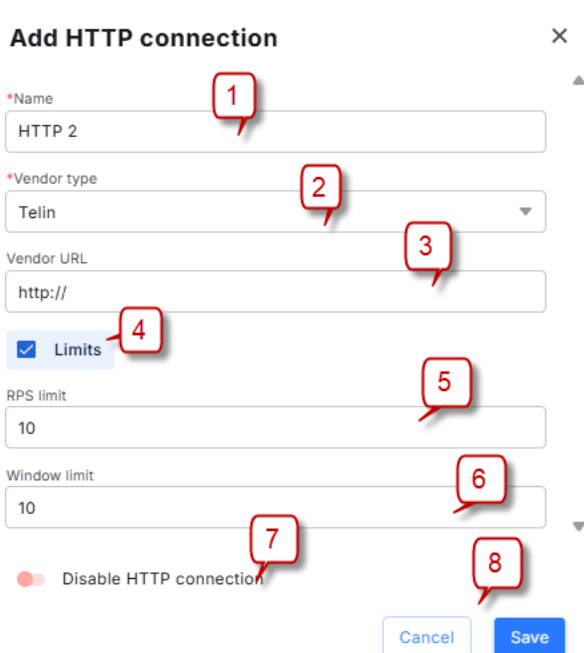
1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Viber.
3. *Vendor URL*: the URL supplied by the provider.
4. *Service ID*: value obtained via Viber Business Messaging account settings, required.
5. *Limits*: select the checkbox to specify connection limits.

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.
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](#).

11.3.2 Telin



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 options:

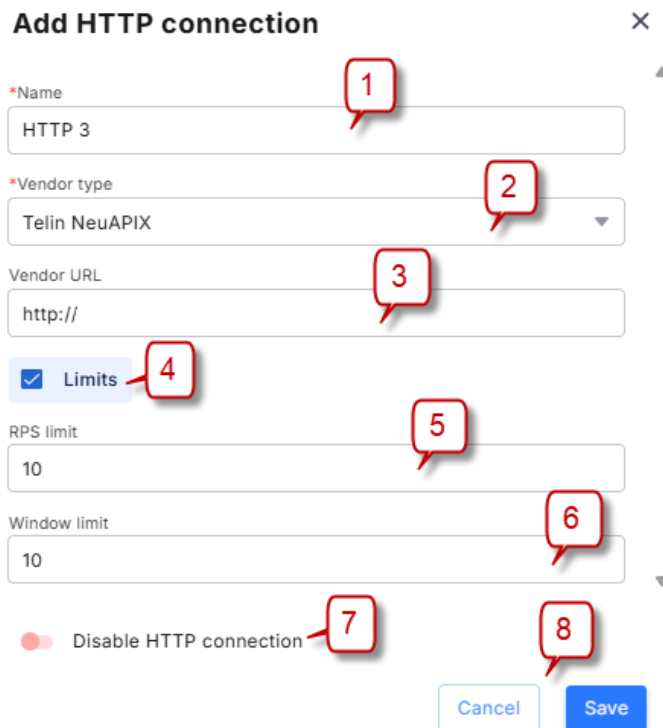
- 1. ***Name**: A text input field containing "HTTP 2".
- 2. ***Vendor type**: A dropdown menu with "Telin" selected.
- 3. **Vendor URL**: A text input field containing "http://".
- 4. **Limits**: A checked checkbox.
- 5. **RPS limit**: A text input field containing "10".
- 6. **Window limit**: A text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

Telin connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: 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.
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.

11.3.3 Telin NeuAPIX



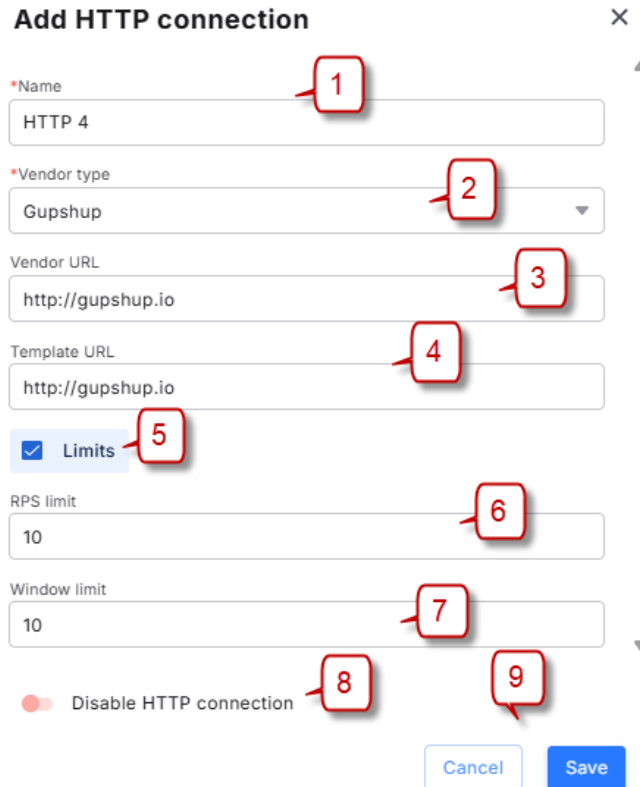
The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and controls, each with a red callout bubble containing a number:

- 1. ***Name**: Text input field containing "HTTP 3".
- 2. ***Vendor type**: Dropdown menu with "Telin NeuAPIX" selected.
- 3. **Vendor URL**: Text input field containing "http://".
- 4. **Limits**: A checked checkbox.
- 5. **RPS limit**: Text input field containing "10".
- 6. **Window limit**: 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.

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.
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.

11.3.4 Gupshup



Add HTTP connection ×

*Name **1**
HTTP 4

*Vendor type **2**
Gupshup

Vendor URL **3**
http://gupshup.io

Template URL **4**
http://gupshup.io

Limits **5**

RPS limit **6**
10

Window limit **7**
10

Disable HTTP connection **8** **9**

Cancel Save

Gupshup connection

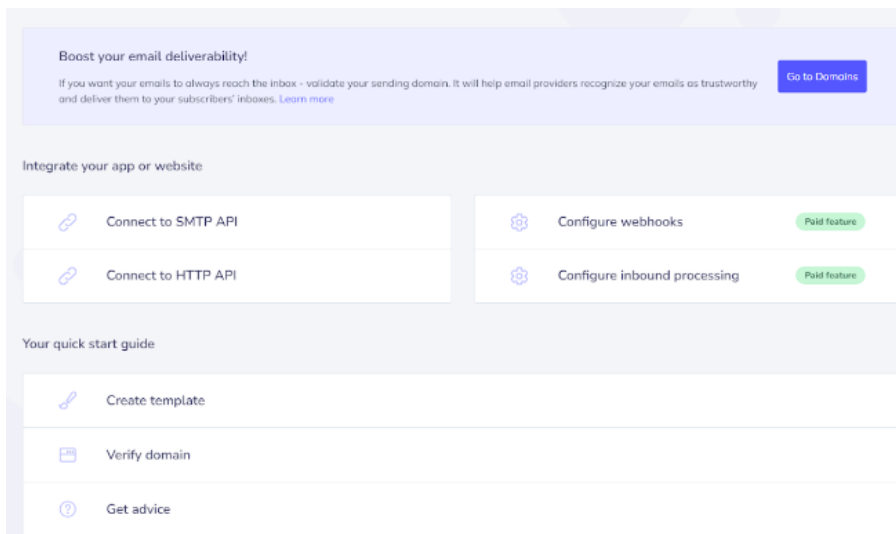
1. *Name*: set the connection name.
2. *Vendor type*: Gupshup.
3. *Vendor URL*: the URL for session messages.
4. *Template URL*: the URL for template messages.
5. *Limits*: select the checkbox to specify connection limits.
6. *RPS limit*: Requests per Second limit. Set the maximum number of requests/sessions per second-to limit the load on each connection for each Sender ID of the respective channel.
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.

11.3.5 Elasticemail

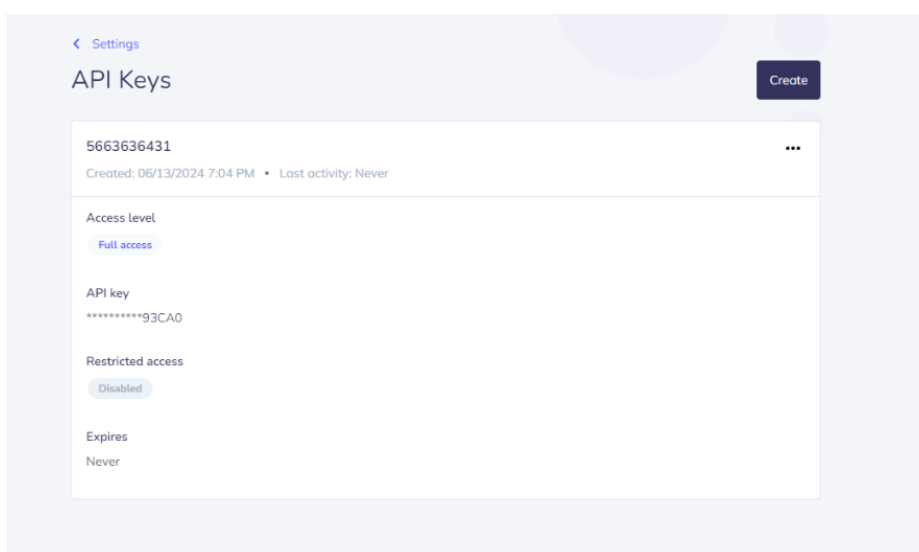
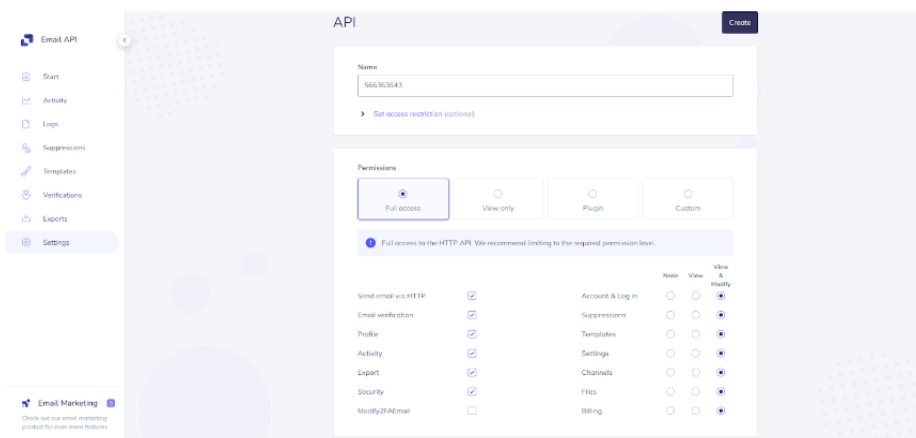
The platform provides an opportunity to configure connection via API with Elasticemail vendor, which is a convenient transactional email delivery service. To complete the integration, kindly perform the steps described below.

To create a connection with Elasticemail vendor:

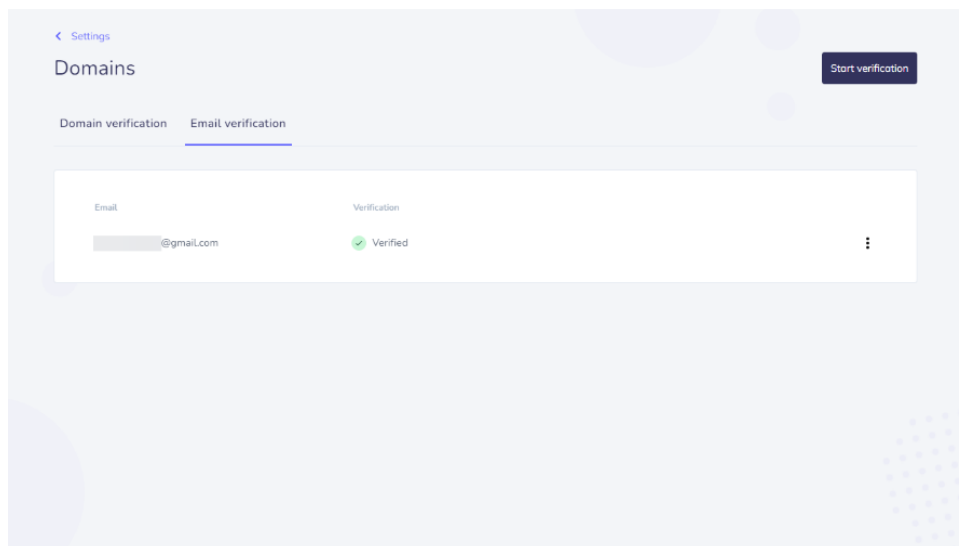
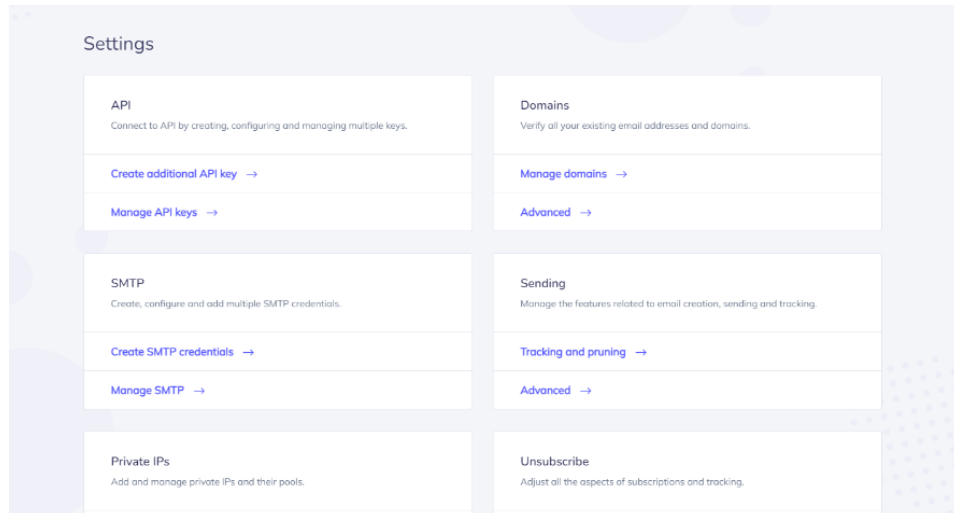
1. Create an account with the Elasticemail service. Log in and choose to connect to HTTP API as shown below:



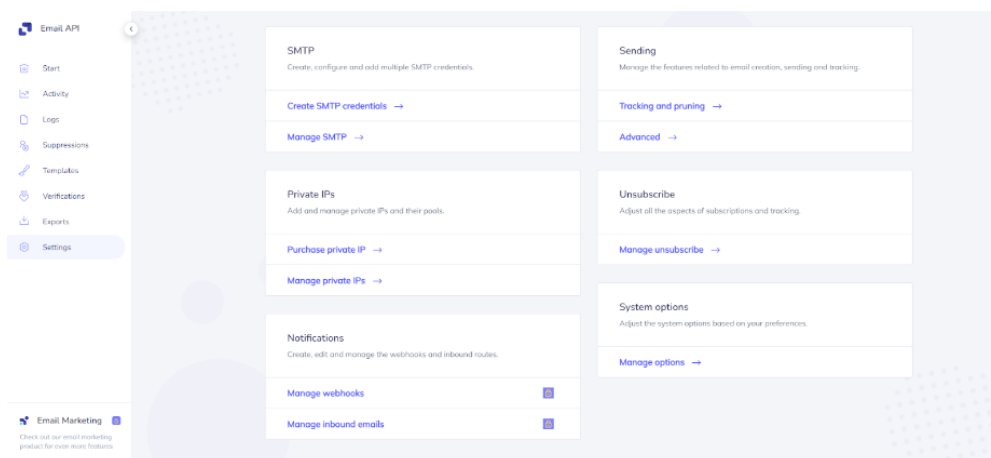
2. Create your API key with customized access:



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.

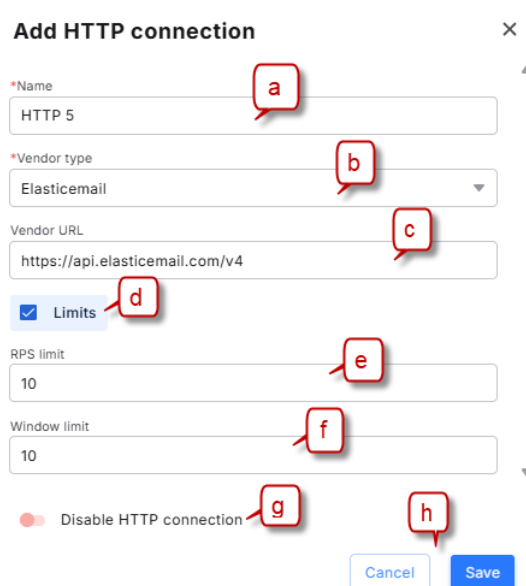


4. After sending a successful email with API, available channels will be shown in Activity>Channels page.
5. Set up Webhook to receive message status update in Notification\Webhooks:



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 Elastic email vendor from the System side:



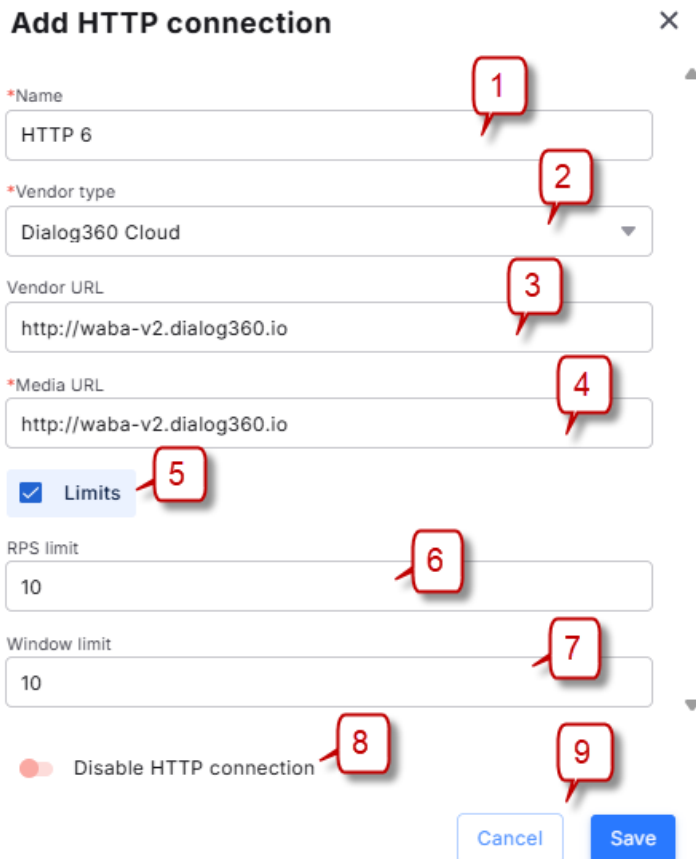
The screenshot shows a dialog box titled "Add HTTP connection" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field containing "HTTP 5", annotated with a red callout 'a'.
- Vendor type:** A dropdown menu with "Elasticemail" selected, annotated with a red callout 'b'.
- Vendor URL:** A text input field containing "https://api.elasticemail.com/v4", annotated with a red callout 'c'.
- Limits:** A checkbox labeled "Limits" which is checked, annotated with a red callout 'd'.
- RPS limit:** A text input field containing "10", annotated with a red callout 'e'.
- Window limit:** A text input field containing "10", annotated with a red callout 'f'.
- Disable HTTP connection:** A radio button option, currently unselected, annotated with a red callout 'g'.
- Buttons:** "Cancel" and "Save" buttons at the bottom right, with "Save" annotated with a red callout 'h'.

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.
 - Window limit:* the limit of the message processing pool. The recommended value for this field should not exceed 100.
 - Disable HTTP connection:* select to disable the connection.
 - 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](#) ⁶⁸.

11.3.6 Dialog360 Cloud



Add HTTP connection ×

*Name **1**
HTTP 6

*Vendor type **2**
Dialog360 Cloud

Vendor URL **3**
http://waba-v2.dialog360.io

*Media URL **4**
http://waba-v2.dialog360.io

Limits **5**

RPS limit **6**
10

Window limit **7**
10

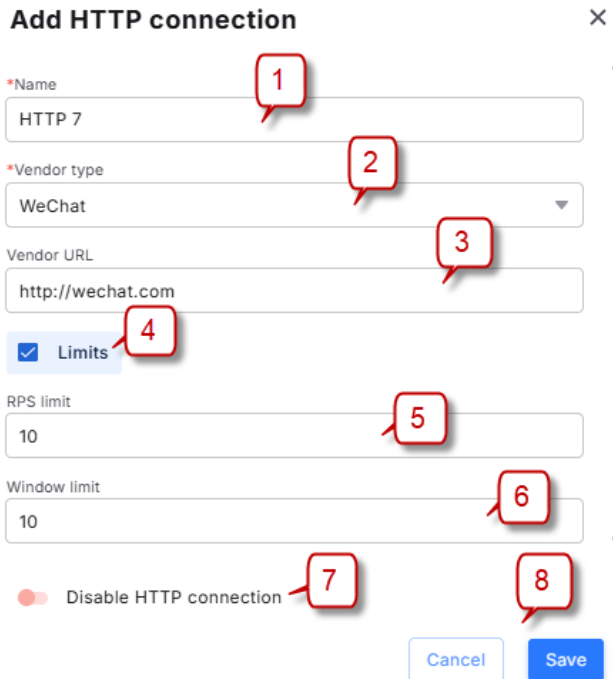
Disable HTTP connection **8**

9 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.
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.

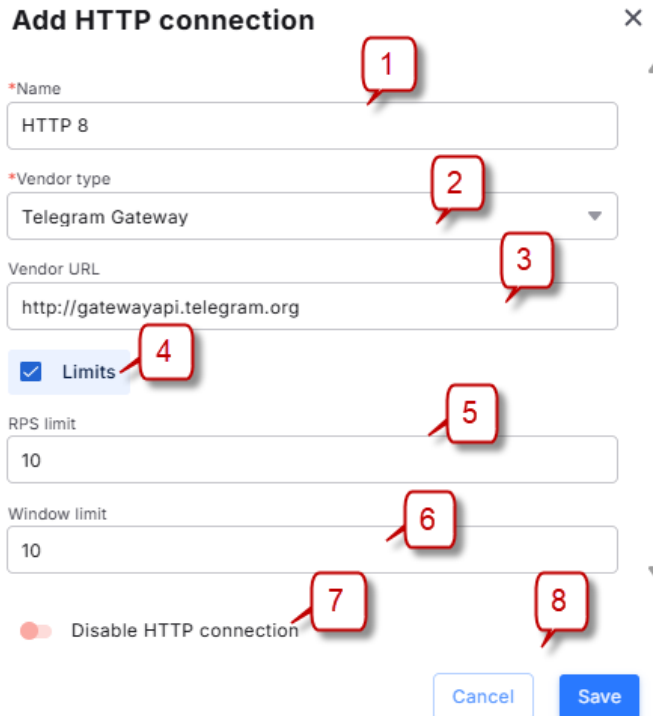
11.3.7 WeChat



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.
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.

11.3.8 Telegram Gateway



Add HTTP connection

*Name: HTTP 8

*Vendor type: Telegram Gateway

Vendor URL: http://gatewayapi.telegram.org

Limits

RPS limit: 10

Window limit: 10

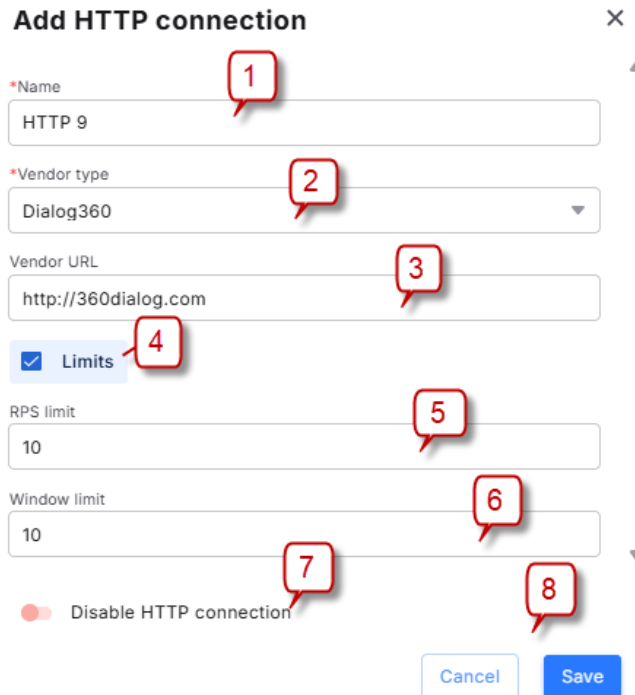
Disable HTTP connection

Cancel Save

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.
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.

11.3.9 Dialog360



Add HTTP connection [X]

*Name **1**
HTTP 9

*Vendor type **2**
Dialog360

Vendor URL **3**
http://360dialog.com

Limits **4**

RPS limit **5**
10

Window limit **6**
10

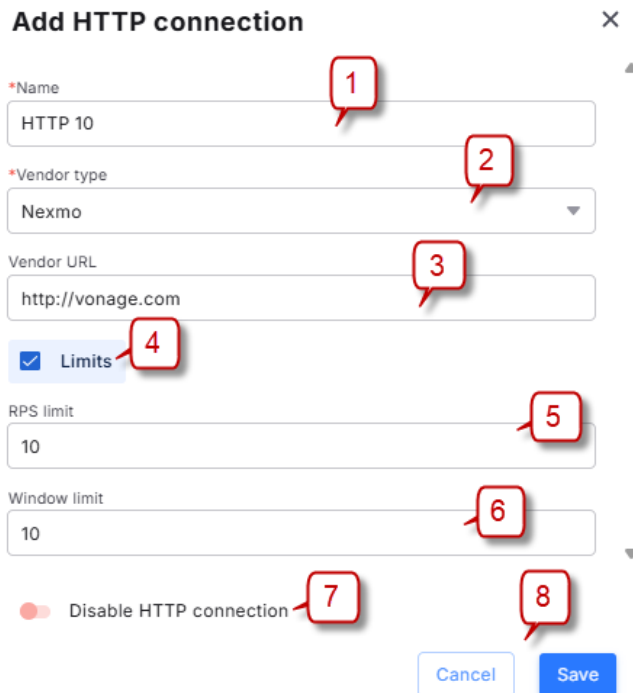
Disable HTTP connection **7**

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.
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.

11.3.10 Nexmo



Add HTTP connection ×

*Name

*Vendor type

Vendor URL

Limits

RPS limit

Window limit

Disable HTTP connection

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.
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.

11.3.11 Transit Viber

Add HTTP connection ×

*Name 1

*Vendor type 2

Vendor URL 3

Limits 4

RPS limit 5

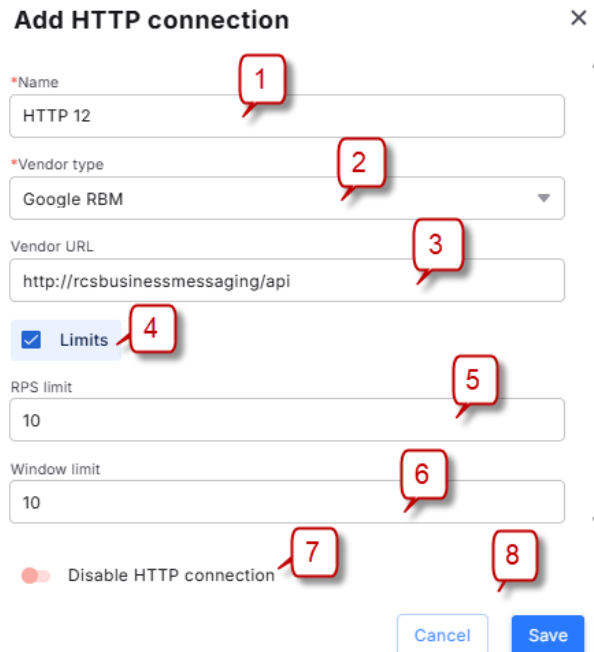
Window limit 6

Disable HTTP connection 7 8

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.
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.

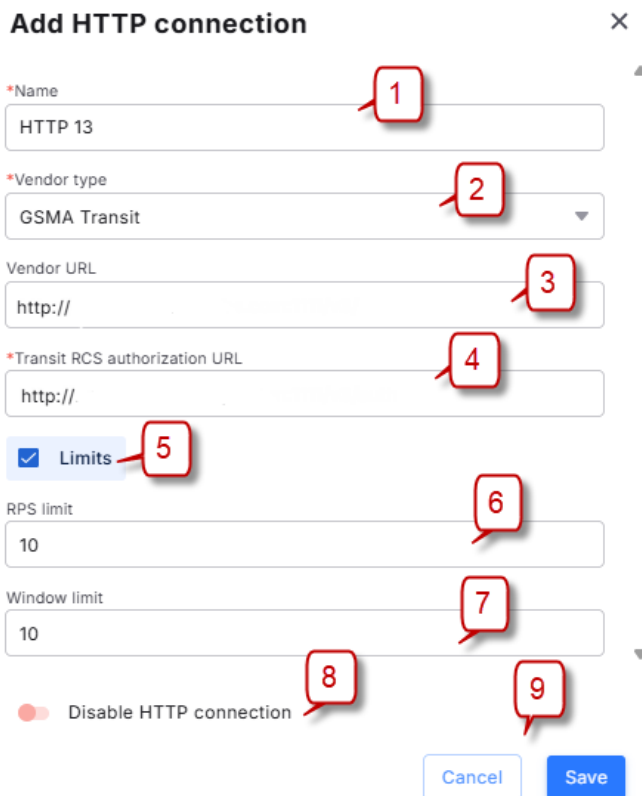
11.3.12 Google RBM



Google RBM connection

1. *Name*: add an arbitrary connection name.
2. *Vendor type*: Google RBM.
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.
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.

11.3.13 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 red callout box containing a number:

- 1. ***Name**: Text input field containing "HTTP 13".
- 2. ***Vendor type**: Dropdown menu with "GSMA Transit" selected.
- 3. **Vendor URL**: Text input field containing "http://".
- 4. ***Transit RCS authorization URL**: Text input field containing "http://".
- 5. **Limits**: A checked checkbox.
- 6. **RPS limit**: Text input field containing "10".
- 7. **Window limit**: 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.
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.

11.3.14 Transit SMS

Add HTTP connection ×

*Name 1
HTTP 14

*Vendor type 2
Transit SMS

Vendor URL 3
http://

Limits 4

RPS limit 5
10

Window limit 6
10

Disable HTTP connection 7 8

Cancel Save

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.
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.

11.3.15 Mobile Push

✕

Add HTTP connection

*Name 1

Mobile Push connection1

*Vendor type 2

Mobile Push

Vendor URL 3

www 4

Limits 5

RPS limit

50

Window limit 6

10

Disable HTTP connection 7

8

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.
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.

11.4 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*.

11.4.1 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 app	yoyoyoy	System owner	Zimbabwe			yoyoyoyo	
41767076		VV	System owner	Zimbabwe			VAGA	
41767073		VA	System owner	Zimbabwe			VA - -Legal c...	

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.

Add Legal entity

13 X

*Name

Hornes and Hooves

*Legal company name

Hornes and Hooves, Inc.

*Country

Canada

Portal

from app

Tax ID number

12345678

*Legal ID number

654321

VAT ID number

Enter value

Legal address

77 Barn str. NowHere

Billing address

77 Barn str. NowHere

Payment systems

STRIPE DEFAULT (STRIPE) X Select...

Is Default

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.

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. *Payment systems*: payment systems associated with the legal entity. Payment systems are crated in the [Settings\Payments systems](#) interface.
11. *Is default*: the default legal entity is selected by default in all legal entity entry forms.
12. Click *Save* to save the record or *Cancel* to discard the settings.
13. Click to close the form.

11.4.2 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 Self-registration* to add Self-registration. Proceed as detailed below.

Add Self-registration



General

*Own legal entities 1
 System owner

*Portal 2
 Demo

*Own Bank Account 3
 UNKNOWN-1

Self registration enabled 4

Terms of Service 5
 Terms of Service
 Formats available: pdf

Privacy Policy
 Privacy Policy
 Formats available: pdf

Mobile phone verification 6

*Integration 7
 Self_registration_2fa (Self_registration_s

*Report email 8
 abc@demo.com

Moderation 9

Two Factor Authentication for users 10

Agreement Details

*Agreement prefix 11
 123

*Currency
 EUR

*Credit limit
 500

*Billing timezone
 Europe/Zagreb

*Billing period
 Daily

Billing day
 1

Split by month 12

Services & Packs

*Services
 SMS (EUR) X

Packs
 1 EUR ON MESSAGES - WELCOME BONUS (EU... X

13


Add Self-registration

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](#) interface.
4. *Self-registration enabled*: select the checkbox to enable self-registration.
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 or *Cancel* to discard the settings.

11.5 Notifications channels settings

The *Settings\Notifications channels settings* interface serves to configure channels for notifying users about various System events (currently only the email channel is available).

Notifications channels settings		
Type	Name	Config
 Email	email	Host: relay Port: 587 TLS: true Sender: noreplay Login: frw Password: Protocol: PROTOCOL_TLSv1

Notifications channels settings

Click on a record to view and edit its properties as shown below.

View Notification channel



*Type

*Name

*Host

*Port

*Sender

*Login

*Password



Edit Notification channel (1)

1. Click *Edit* to start editing the record or *Cancel* to close the form.

Edit Notification channel ✕

1

*Type
@ Email

*Name
email

*Host
relay.

*Port
587

*Sender
noreplay

*Login
frw

*Password
Enter value

*Protocol
PROTOCOL_TLSv1

*TLS **2**
 Use TLS

3
Cancel Save

Edit Notification channel (2)

1. Edit the properties as appropriate.
2. Select the checkbox to use TLS.
3. Click *Save* to save the changes or *Cancel* to discard the settings.

11.6 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 Elite	Demo AY	sms_http	ACTIVE	18.11.2024				
10	Self_registration_2fa	System owner <small>OWN</small>	Self_registration_sender	ACTIVE	11.11.2024				
9	2fa	Demo AY	79554736007	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 Elite	Demo AY	sms_http	BLOCKED	23.04.2024				

Two-factor authentication

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](#)¹⁹³ and [Statistics](#)¹⁹⁵ 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](#).²¹⁹

11.6.1 Create 2FA integration

Click *Add Integration* and proceed as follows.

Create 2FA integration ×

Code generation and verification

On the client side 1

General Information

*Name 2
 Code for Client TM 18 / 30
Under this name you will be able to see the statistics on sending codes in reports.

*Company 3 Telecom Monsters 4 *SMS Sender ID Monster

*Message Text 5
 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 6
 92804fe822cc9fc3a7589325d6c99078:fe7c55daa290d81c29c9be97de80afa2 +

URL for integration 7
 https:// 8

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.

- 8. 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.

11.6.2 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 11 / 110
Under this name you will be able to see the statistics on sending codes in reports.

*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

Cancel Edit

Edit 2FA integration (1)

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**
Update code 11 / 110
Under this name you will be able to see the statistics on sending codes in reports.

***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

Cancel Delete Enable Save

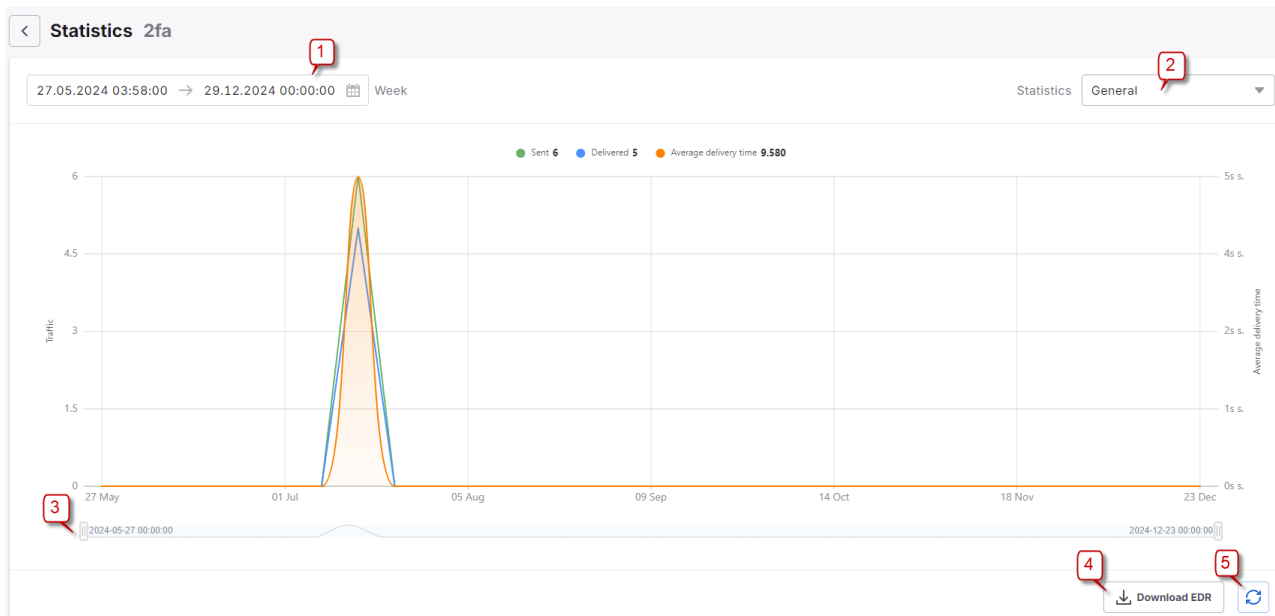
Edit 2FA integration (2)

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.


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*.

11.6.3 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.

11.7 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 Upper-level reseller. The data is used when creating Agreements and can also be used in invoices.

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

Add Own bank account

*Name

*Legal entity

*Parent bank

*Account holder

*Account number

Add Own bank account

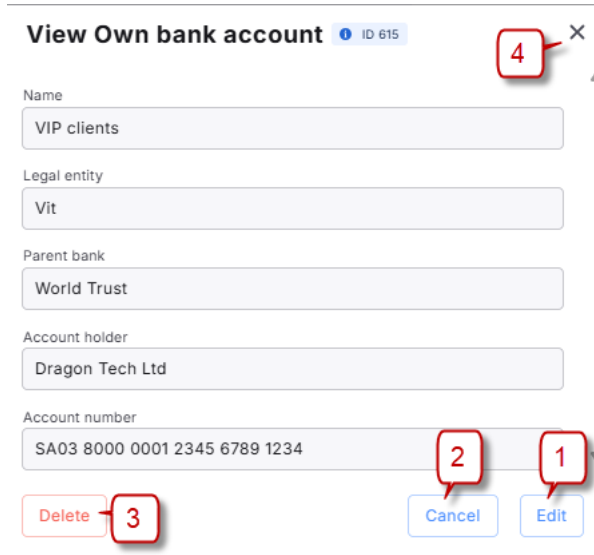
1. *Name*: short name to be displayed in the System interfaces.
2. *Legal entity*: legal entity of the reseller/tenant. Select a legal entity from the drop-down list of legal entities created in the Own legal entity interface.
3. *Parent bank*: the financial institution that maintains the account. Select 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 upper-level reseller is available for resellers.

4. *Account holder*: the beneficiary name (individual or company) as registered in the bank.

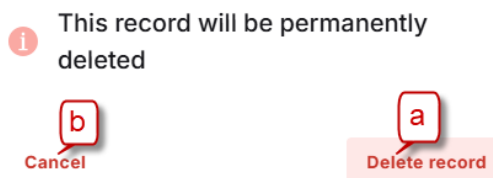
5. *Account number*: unique bank account number.
6. Click to clear a field.
7. Click *Save* to save the profile or *Cancel* to discard the changes.
8. Click to close the form.

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



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.



Delete confirmation dialog box

4. Click to close the form.

Edit Own bank account ID 615

*Name
VIP clients

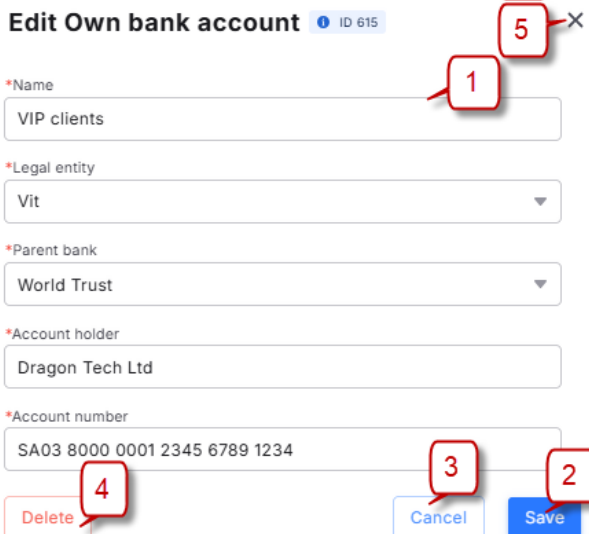
*Legal entity
Vit

*Parent bank
World Trust

*Account holder
Dragon Tech Ltd

*Account number
SA03 8000 0001 2345 6789 1234

Delete Cancel Save



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 *Banks* interface is available at all levels: for tenants and resellers.

11.8 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.

- 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 1

Enabled 2

*Payment system type 3

S Stripe

*Secret key 4

*Deduct payment fee from 5

Client Owner

6

Cancel Save

Add Payment system (Payment system type = Stripe)

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*.

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*).

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

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:


Add Payment system



*Payment system name 1

Enabled 2

*Payment system type 3

 PayOnline 3

*Merchant ID 4

*Private security key 5

*Deduct payment fee from 6

Owner 6

Internal system fee 7

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

8

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:

Add Payment system ✕

*Payment system name 1

Enabled 2

*Payment system type 3

*Secret key 4

*Merchant ID 5

*Deduct payment fee from 6

Client Owner

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:

Add Payment system



*Payment system name 1

Enabled 2

*Payment system type 3

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

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.

Click on a record in the table to view Payment system.


View Payment system ID 2

Payment system name

PayOnline Default

 Enabled

Payment system type

 PayOnline

Merchant ID

81135

Private security key

54653246-08ea

*Deduct payment fee from

 Owner

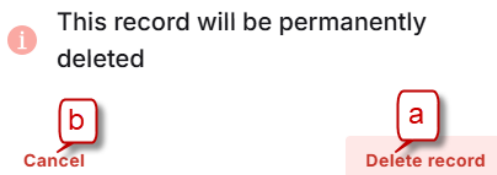
Internal system fee

1

Charged to client, specified in percentages (%), minimum value: 0.01, maximum value: 100

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.



Delete confirmation dialog box

4. Click to close the form.


Edit Payment system ID 2

*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

Delete

Cancel

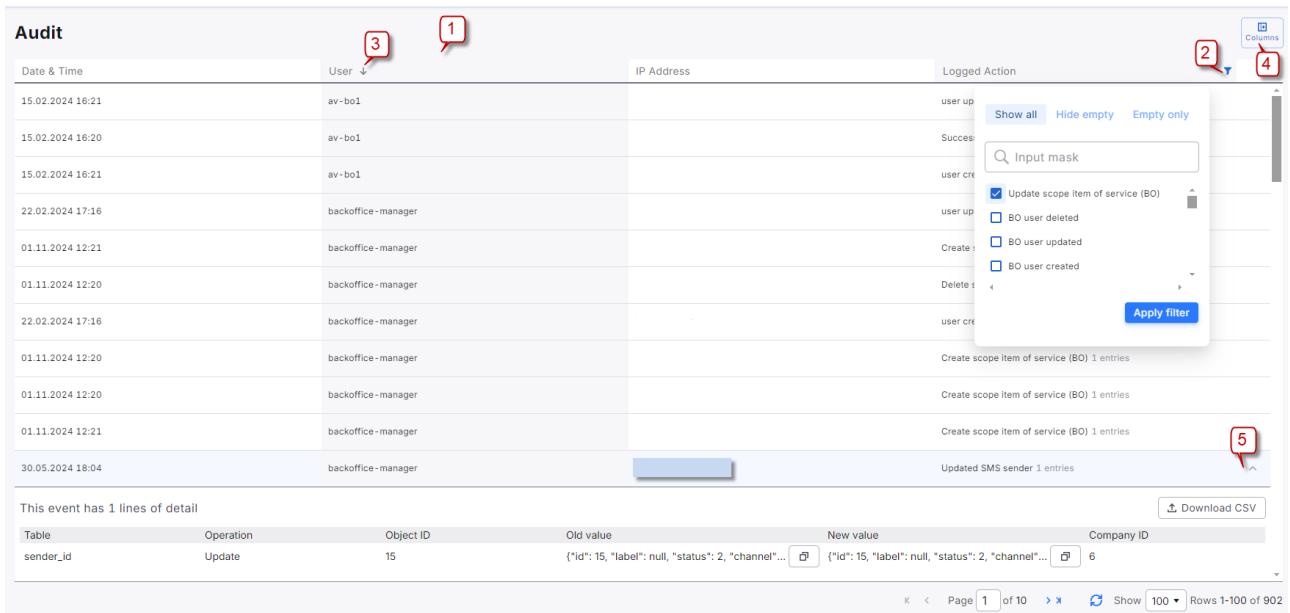
Save

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.

12 Audit

Audit is the activity log of the BackOffice Manager.



The screenshot displays the Audit interface with the following components:

- Table 1:** Main audit log table with columns: Date & Time, User, IP Address, and Logged Action.
- Table 2:** Detailed view of an event with columns: Table, Operation, Object ID, Old value, New value, and Company ID.

Numbered callouts (1-5) indicate key features: 1. User column header, 2. Filter dropdown menu, 3. User column dropdown arrow, 4. Columns menu icon, 5. Clickable event entry.






Audit

1. The table contains the following parameters:
 - *Date and time.*
 - *User.*
 - *IP address.*
 - *Logged action.*
2. Click to add filter.
3. Click to apply sorting (descending or ascending).
4. Click to customize the display of columns.
5. Click on the entry to view the details and download CSV.

13 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					
Client	Channel	Type	Name	Object ID	Text Preview	Created	
<input type="checkbox"/> Demo AY	 	 Campaign	New customer gree...	931	Hi , thanks for purc...	26.12.2023 16:18	
<input type="checkbox"/> Demo AY		 Campaign		833	hctest 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						
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.

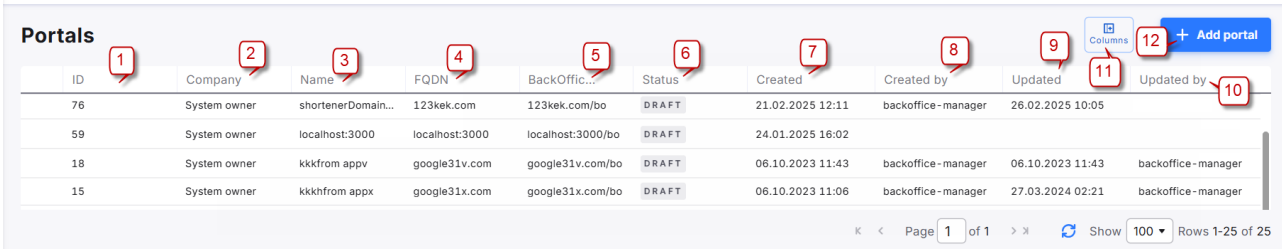


Pre-moderation

- 2. *Manager*: BackOffice user that approved or rejected the record.
- 3. *Created*: approval/rejection date.

14 Portals

The *Portals* interface serves to create and configure the System portals that the System owner will offer its clients.



The screenshot shows a table titled "Portals" with the following columns: ID, Company, Name, FQDN, BackOffice..., Status, Created, Created by, Updated, and Updated by. There are 12 numbered callouts: 1 points to the ID column header, 2 to the Company column header, 3 to the Name column header, 4 to the FQDN column header, 5 to the BackOffice... column header, 6 to the Status column header, 7 to the Created column header, 8 to the Created by column header, 9 to the Updated column header, 10 to the Updated by column header, 11 to a "Columns" button, and 12 to an "Add portal" button. The table contains four rows of data, all with a status of "DRAFT".

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.

Add Portal ×

*Company

*Name

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

? 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)



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.

Add Portal ×

Branding

! Only dark background logos will be used for the Admin portal at the moment

Languages

ENGLISH × Select... ☰

Page title

HoHo

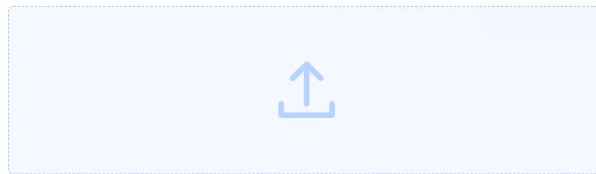
Main menu logo 7

Square logo (light background)



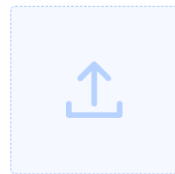
1:1 ratio recommended

Expanded logo (light background)



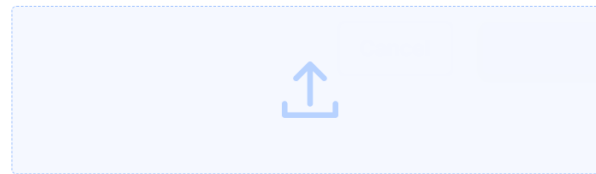
4:1 ratio recommended

Square logo (dark background)



1:1 ratio recommended

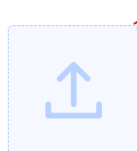
Expanded logo (dark background)



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.

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).
8. *Favicon*: click  to add a favicon (a small square image that represents your website in browsers).


Add Portal

Login page

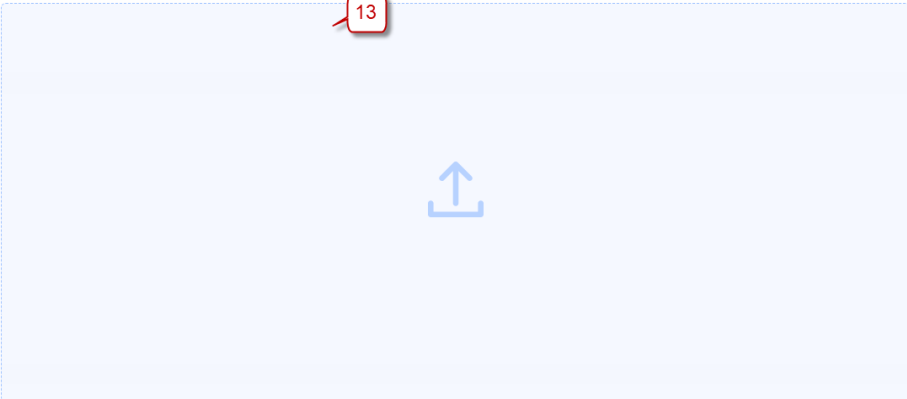
Login page logo



Recommended ratio is 4:1 or 1:1

English 



Login page background



16:9 ratio recommended

Display Branding

Add portal (part 3)

9. *Login page logo*: click  to add a logo displayed at the login page.
10. Select a language.
11. Provide a description that will be shown above the login fields.
12. Click *Add translation* to provide the description in more than one language.
13. *Login page background*: click  to add a background picture for the login page.
14. Select the checkbox to display branding.

Add Portal ×

Shlink URL shortener domain 15

 Enable Intercom 16
*Intercom App ID 17

Intercom Secret key 18

License & Privacy 19

License agreement




Privacy policy

Support Email 20

21

Add portal (part 4)

15. *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.
16. *Enable Intercom*: select the checkbox to enable Intercom functionality.
17. *Intercom App ID*: specify Intercom App ID (required).
18. *Intercom Secret key*: type Intercom Secret key providing identity verification that stops anyone impersonating your logged-in users from seeing their conversations (optional).
19. *License and Privacy*: click  to upload License agreement and Privacy policy in pdf.
20. *Support email*: specify the email address that will be displayed in the [Help window](#) ¹¹ and the user's profile to be used for feedback from partners.
21. Click *Save* to save the changes or *Cancel* to discard the settings.

15 Reselling

15.1 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.

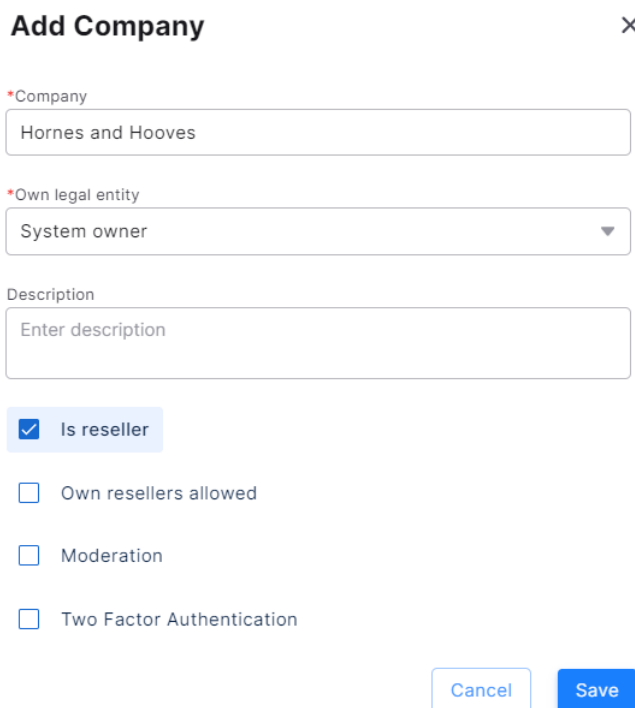
The set of services that a reseller can offer its customers is defined by the agreement between the tenant and reseller. The cost of services and pricing models (pay-as-you-go or packs) are defined by the reseller itself. Resellers have their own account in BackOffice to manage the services.

15.2 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](#)¹⁸ and select *Is reseller* in its properties:



Add company, *Is reseller*

2. Assign at least one legal entity to the reseller in [Account management\Legal entities](#)²³.
3. Create an agreement in [Account management\Agreements](#)²⁶.
4. Associate the agreement created in the previous step with the Reseller's legal entity ([Account management\Agreements](#)²⁶). This is the agreement that governs the reselling services.
 - 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](#)^[31] or [Account management\Agreements\Enabled packs](#)^[33] respectively).
6. Create a BackOffice user for the Reseller company (added at step 1). Assign the user full access permissions. See [Users](#)^[142] for instructions on creating a user.
7. Create a System portal for the reseller in [Portals](#)^[209]. 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](#)^[23] interface. In the *Portal* field select the portal created at step 7 as illustrated in the figure below.

Edit Legal entity ID 47
✕

***Name**

***Company**

***Legal company name**

Portal

HoHo Portal (Reseller)

123456

Legal address

Billing address

Is default

Manage reselling agreements

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](#)^[88]).
10. Optional: associate Sender IDs with the Reseller (in [Account management\Sender IDs](#)^[39]). 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](#)^[209] interface (this task can also be performed by the Tenant).
2. Check that the Reseller's legal entity is available in [Settings\Own legal entities](#)^[183]. More legal entities can be added if necessary.
3. Create a System account to test the capabilities:
 - a. Create a company in [Account management\Companies](#)^[18].
 - b. Assign a legal entity to the company in [Account management\Legal entities](#)^[23].
 - c. Associate the agreement created in the previous step with the Reseller's legal entity ([Account management\Agreements](#)^[26]).

- d. Create a Client portal user for the company ([Users\Client portal](#)^[146]).
4. Create services in [Finance\Services](#)^[93].
5. Check that Sender IDs are available in [Account management\Sender IDs](#)^[39] (if they were added at step 10 above).
6. Create a company for the client ([Account management\Companies](#)^[18]).
7. Create a legal entity and associate it with the company ([Account management\Legal entities](#)^[23]).
8. Create an agreement in [Account management\Agreements](#)^[26].
9. Top up the agreement's balance in [Finance\Payments](#)^[88].
10. Assign services and/or packs to the agreement (in [Account management\Agreements\Enabled services](#)^[31] or [Account management\Agreements\Enabled packs](#)^[33] respectively).
11. Assign sender IDs to the client ([Account management\Sender IDs](#)^[39]).
12. Create a Client portal user for the client ([Users\Client portal](#)^[146]).
13. Assign the Sender ID to the client company's agreement ([Account management\Sender IDs](#)^[39]).

16 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.

17 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*.

17.1 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"
}
```

17.2 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:

```
$ 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  
}
```

17.3 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>"  
  }  
}
```

17.4 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  
}
```

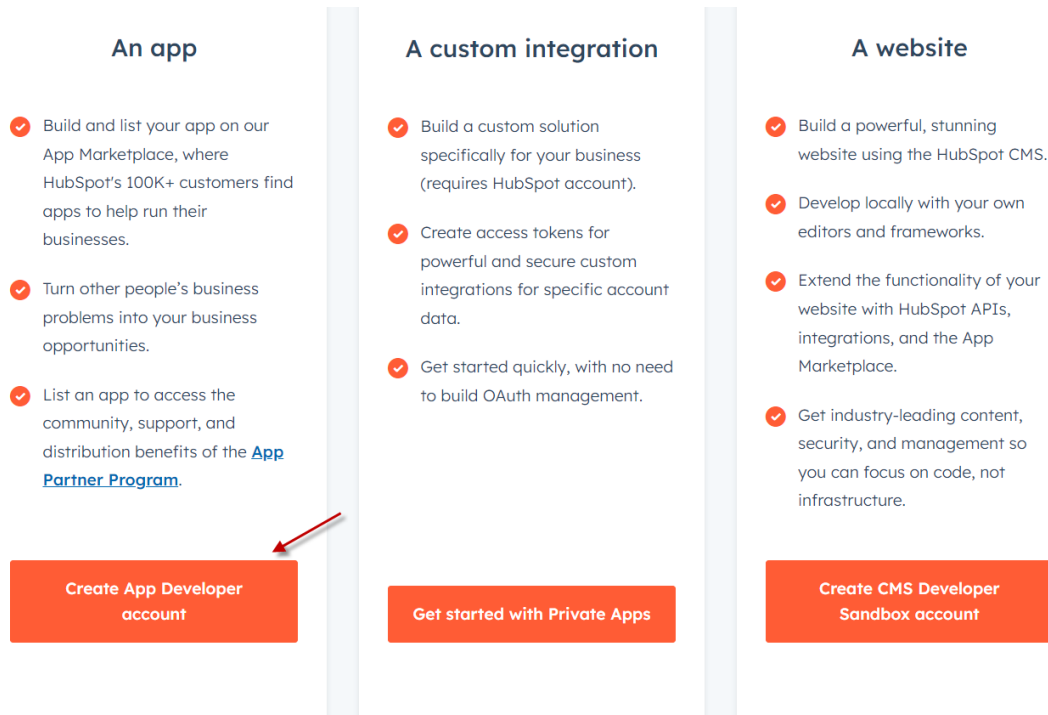
"timestamp" above indicates the time of a request received by the System for which requestId was generated.

18 Appendix 3. HubSpot integration with the System

HubSpot is a leading contact relationship management (CRM), marketing, sales, and customer service software company. It is possible to integrate the System with HubSpot and use the app to generate RCS and SMS messages which will go through the Client portal (and will be displayed in the *Conversations* interface) and be forwarded to the end-users (which are present in HubSpot Contacts).

To integrate the System with HubSpot, follow the steps below:

1. Create a Developer Account on HubSpot: <https://developers.hubspot.com/get-started>.



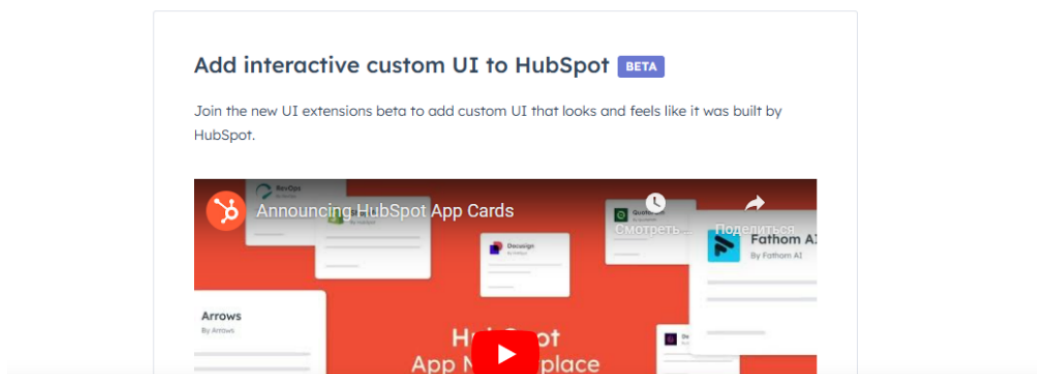
An app	A custom integration	A website
<ul style="list-style-type: none"> Build and list your app on our App Marketplace, where HubSpot's 100K+ customers find apps to help run their businesses. Turn other people's business problems into your business opportunities. List an app to access the community, support, and distribution benefits of the App Partner Program. 	<ul style="list-style-type: none"> Build a custom solution specifically for your business (requires HubSpot account). Create access tokens for powerful and secure custom integrations for specific account data. Get started quickly, with no need to build OAuth management. 	<ul style="list-style-type: none"> Build a powerful, stunning website using the HubSpot CMS. Develop locally with your own editors and frameworks. Extend the functionality of your website with HubSpot APIs, integrations, and the App Marketplace. Get industry-leading content, security, and management so you can focus on code, not infrastructure.
Create App Developer account	Get started with Private Apps	Create CMS Developer Sandbox account

2. Create a HubSpot App.

Build a public app

Build a public app to add custom functionality through HubSpot's APIs and other app features like webhooks, timeline events, and more. Public apps can be listed on the App Marketplace, making it easy for any HubSpot user to discover and install them. [Learn more about public apps](#)

Create app



Add interactive custom UI to HubSpot BETA

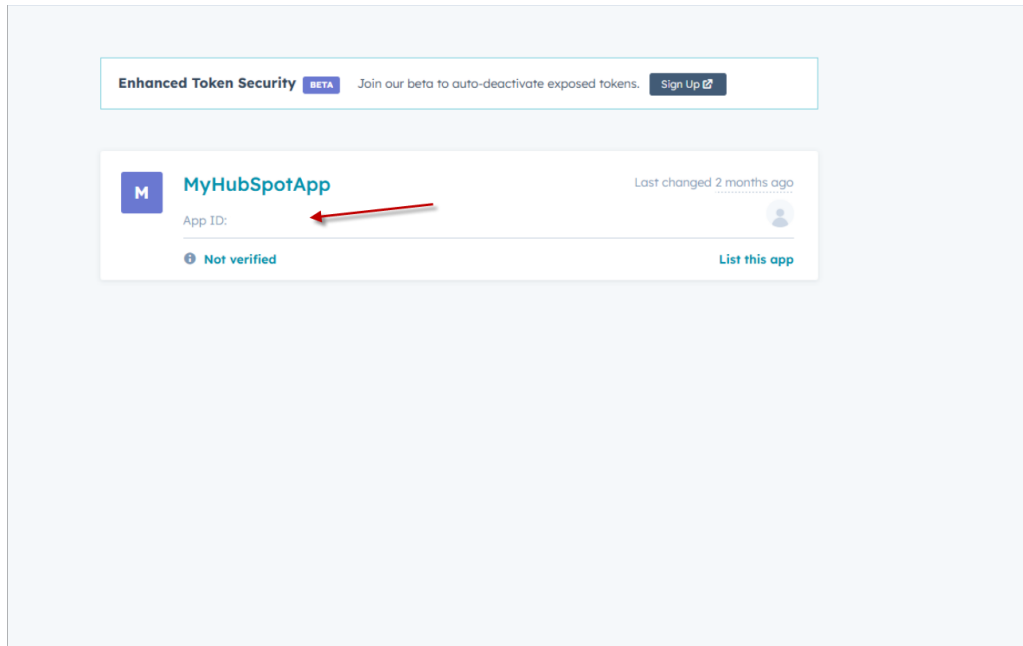
Join the new UI extensions beta to add custom UI that looks and feels like it was built by HubSpot.

Announcing HubSpot App Cards

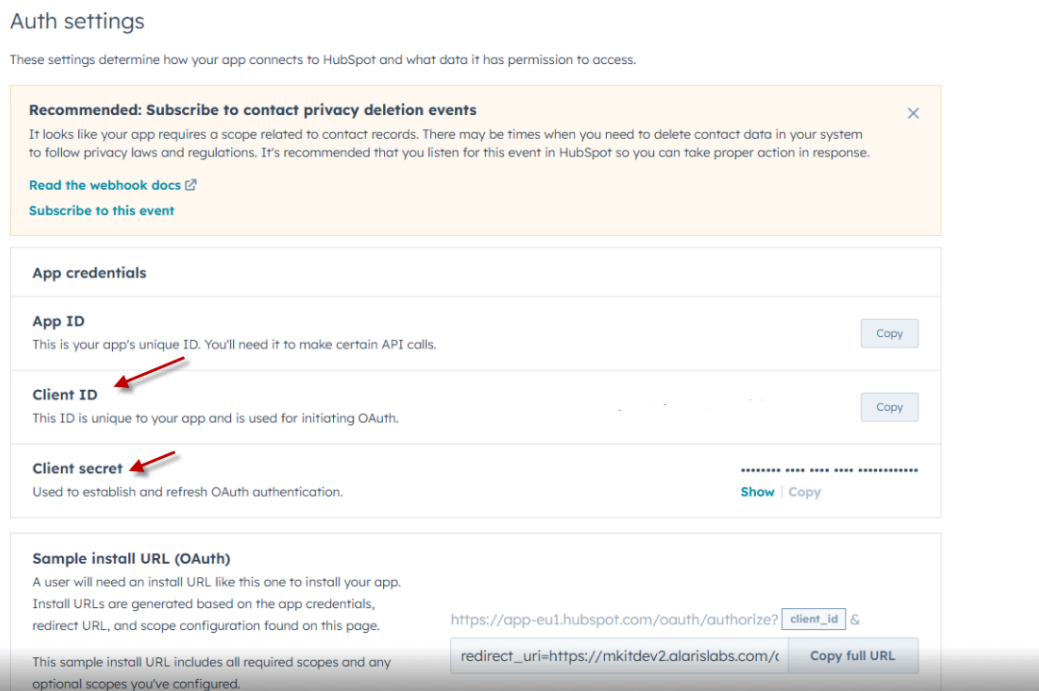
Arrows By Arrows

HubSpot App Marketplace

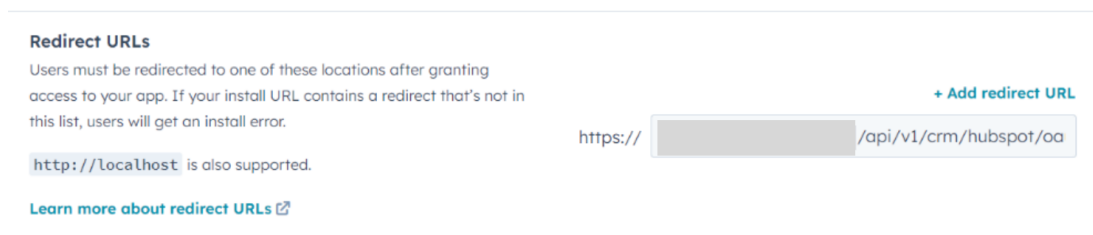
Fathom AI By Fathom AI



3. Save Client ID и Client secret of created App. Pass these details to our Support team.



4. Set Redirect URLs for oath call-back. For example: clientportal_domain/api/v1/crm/hubspot/oauth-callback.



5. Set HotSpot permissions.

CRM	Read	Write
crm.lists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.companies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.custom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.deals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.feedback_sub...	<input checked="" type="checkbox"/>	
crm.objects.goals	<input type="checkbox"/>	
crm.objects.line_items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.marketing_ev...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.owners	<input checked="" type="checkbox"/>	
crm.objects.quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.schemas.companies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.schemas.contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.schemas.custom	<input checked="" type="checkbox"/>	
crm.schemas.deals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.schemas.line_items	<input checked="" type="checkbox"/>	
crm.schemas.quotes	<input checked="" type="checkbox"/>	

Settings	Read	Write
settings.billing		<input type="checkbox"/>
settings.users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
settings.users.teams	<input type="checkbox"/>	<input type="checkbox"/>

content	<input checked="" type="checkbox"/>
conversations.read	<input checked="" type="checkbox"/>
conversations.visitor_identificat...	<input checked="" type="checkbox"/>
conversations.write	<input checked="" type="checkbox"/>
crm.export	<input checked="" type="checkbox"/>
crm.import	<input checked="" type="checkbox"/>
e-commerce	<input type="checkbox"/>
external_integrations.forms.acces...	<input type="checkbox"/>
files	<input checked="" type="checkbox"/>
files.ui_hidden.read	<input type="checkbox"/>
forms	<input checked="" type="checkbox"/>
forms-uploaded-files	<input type="checkbox"/>
hubdb	<input type="checkbox"/>
integration-sync	<input type="checkbox"/>
media_bridge.read	<input type="checkbox"/>
media_bridge.write	<input type="checkbox"/>
oauth	<input checked="" type="checkbox"/>
sales-email-read	<input type="checkbox"/>
social	<input type="checkbox"/>

6. Create a CRM card and assign required properties.

[Back to all apps](#)
MyHubSpotApp

Getting started CRM cards Create CRM card
CRM card API docs

Basic info
Contact & support
Monitoring
Features
CRM cards
Timeline events
Webhooks
App settings
More features BETA

CARD TITLE	TARGET RECORD TYPES
Send MT ID 452151 Copy	Contacts
Bulk mailing MT ID 452152 Copy	Deals
Conversation ID 452153 Copy	Contacts
Deal stage status ID 452154 Copy	Deals

Send MT

Data request | Card properties | Custom actions

Data fetch URL *
https:// /api/v1/crm/hubspot/card/sendMt
HubSpot will poll this URL to fetch details about your card.
[Learn more about the expected data format for CRM cards](#)

Target record types ⓘ
This card can appear on one or more CRM record types. At least one type is **required**.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input checked="" type="checkbox"/>	<input type="text" value="hs_object_id"/> <input type="text" value="firstname"/> <input type="text" value="phone"/> <input type="text" value="lastname"/>


Bulk mailing MT

Data request | Card properties | Custom actions

Data fetch URL *
https:// /api/v1/crm/hubspot/card/mailing
HubSpot will poll this URL to fetch details about your card.
[Learn more about the expected data format for CRM cards](#)

Target record types ⓘ
This card can appear on one or more CRM record types. At least one type is **required**.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input type="checkbox"/>	Select or enter properties
Companies	<input type="checkbox"/>	Select or enter properties
Deals	<input checked="" type="checkbox"/>	<input type="text" value="hs_object_id"/> <input type="text" value="pipeline"/> <input type="text" value="dealname"/>

Conversation 

Data request


Card properties

Custom actions

Data fetch URL *

https:// /api/v1/crm/hubspot/card/dialog

HubSpot will poll this URL to fetch details about your card.
[Learn more about the expected data format for CRM cards](#)

Target record types 

This card can appear on one or more CRM record types. At least one type is **required**.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input checked="" type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">hs_object_id ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">firstname ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">phone ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">lastname ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">▼</div> </div>

Deal stage status 

Data request


Card properties

Custom actions

Data fetch URL *

https:// /api/v1/crm/hubspot/card/dealstage

HubSpot will poll this URL to fetch details about your card.
[Learn more about the expected data format for CRM cards](#)

Target record types 

This card can appear on one or more CRM record types. At least one type is **required**.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input type="checkbox"/>	Select or enter properties ▼
Companies	<input type="checkbox"/>	Select or enter properties ▼
Deals	<input checked="" type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">hs_object_id ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">pipeline ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">dealname ×</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">▼</div> </div>

7. Create a test HupSpot account.

Test what you build

Developer test accounts are free testing environments with trial access to many Enterprise features. Use them to test apps and integrations without affecting any real HubSpot data. [Learn more about developer test accounts](#)

Create test account

See what's possible using developer test accounts

Not sure where to start? Here are some of the things you can try out with a developer test account.



Test your app

Once you've configured OAuth and added features to your app, install it in a test account to start making API calls. [Learn how to install an app](#)



Try out new product launches or betas

Test accounts have access to many of the same product updates or betas that standard HubSpot accounts do. Use your test account to try things out without impacting any real HubSpot data or automations.

8. Pass Client ID и Client secret to our Support team for internal configuration.
9. After internal configuration you will be able to work in HotSpot dashbord, for example send MT messages.

19 Appendix 4. 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 4. 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 vendor configurations. In this case it will be sk_20c901e*****2a592484*****1.