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## **Customer Management Portal (CMP) Customer's Guide**

Version 3.0 – February 2021



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# 1 Intended Audience

Customers who want to use Digital Interconnect to provision and manage short codes for their campaigns by using the Customer Management Portal and customers who want to raise support tickets by using the Customer Management Portal.



## 2 Introduction

### 2.1 About Customer Management Portal

The Customer Management Portal (CMP) enables you to create and manage campaign requests for your short codes, raise support tickets through the Enterprise Messaging Support Ticket tool and to request Data Extracts. A Digital Interconnect administrator provides you access to the Customer Management Portal.

### 2.2 Logging onto the Customer Management Portal

After your user account is created to access the Customer Management Portal, you receive an email with your login credentials. After receiving your login credentials, you must log onto the Customer Management Portal to change the temporary password.

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**NOTE** Before you log onto the Customer Management Portal, ensure that you use the latest browser and enable pop-ups on your browser. Digital Interconnect recommends that you either use Internet Explorer 9.0+ or use Firefox 23.0+.

---

To log onto the Customer Management Portal, take the following steps:

1. On your browser, open the Customer Management Portal:  
<https://cmp-eu2.sapdigitalinterconnect.com/SAPCMP/login>

The Customer Management Portal Login page displays:

Customer Management Portal for SAP Digital Interconnect

Log In

User Name

Password

Captcha

Click to change

Register  
Forgotten Password?

CLEAR LOGIN

Best Viewed in  
Internet Explorer-8.x and higher on Windows | Firefox-19.x and higher on Windows | Safari-6.x and higher on Mac/iPad/iPhone



2. In the **User Name** text box, type your email address.

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**NOTE** This text box is not case sensitive.

---

3. In the **Password** text box, type your password.
4. Click **LOGIN**.



## 3 User Management

### 3.1 About User Management

User Management enables you to create or edit customer roles. The Customer Management Portal supports the following customer roles:

<b>Customer Administrator</b>	<p>This user has full access to customer and provisioning request data of the user's company. The additional operations that can be performed by this user are as follows:</p> <ul style="list-style-type: none"> <li>• Create more customer sub accounts, submit provisioning request for the user's company, and track provisioning request for the user's company.</li> <li>• Assign or un-assign provisioning request to specific Customer Support personnel for further action.</li> </ul>
<b>Customer Support</b>	<p>This user has full access to provisioning request data of the user's company. This user can create or track short code request for the company and also assign or un-assign provisioning request to a specific Customer Support user for further action.</p>
<b>EMTT Customer Support User</b>	<p>This user can create and update a support ticket.</p>

### 3.2 Adding a Customer Support User

The Customer Administrator has the ability to create and submit the campaign request. However, by adding more Customer Support Users, the Customer



Administrator can delegate provisioning tasks in case your organization submits large number of campaign requests. The Customer Administrator can add one or more Customer Support Users.

To add a Customer Support User, complete the following steps:

1. Log onto Customer Management Portal.
2. Click **User Management**. Click **Add**. The **Select the application** screen appears:

A screenshot of a web application interface. At the top, there are three tabs: '1. Application' (highlighted in orange), '2. User Details', and '3. Preferences'. Below the tabs, the main content area is titled 'Select the application'. Under this title, there are two radio button options: 'Provisioning Request' (which is selected) and 'Customer Support'.





3. Select **Provisioning Request > Customer Support** and click **Next**. The User Details screen is displayed:

4. In the **First name** text box, type the first name.

---

**NOTE** The first name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

5. In the **Last name** text box, type the last name.

---

**NOTE** The last name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

6. In the **Email Id** text box, type the Email Id.

---

**NOTE** Ensure that you type only the username of the Email ID as the domain name of your company is automatically appended to the email address.

---

7. In the **Phone No** text box, type the phone number.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567



1234567890EXT.1234567

+14 1234567890Extension.1234567

8. Click **Next**. The Preferences screen displays:

9. Select either the **US** region or the **LATAM** region.

10. Click **Finish**.

The system generates a password for the Customer Support User and sends it as an email to the user on the email id entered in this form.

---

**NOTE** The new user added to the system must change the system generated password during the first login. After the password is changed, the Customer Support User must re-login.

---

### 3.3 Deactivating or Activating a User

If a user leaves the company, or if there is a need to revoke any user's access for some time period, you can deactivate the user. The deactivate option disables the user account. The Customer Administrator can deactivate a Customer Support User.

To deactivate a user, complete the following steps:

1. Log onto Customer Management Portal.



2. Click **User Management**.
3. Select a user to deactivate.
4. Click **Deactivate**. The following message appears:  
*Do you want to deactivate the selected user(s)?*
5. Click **Yes** to confirm.  
The user account is deactivated.

The user whose account is deactivated cannot log into the system. If a Customer Support user is logged in and the Customer Administrator deactivates the account, the user can continue working on the portal. However, this user cannot login again after logging out of the deactivated system.

To activate a deactivated user, complete the following steps:

1. Log into Customer Management Portal.
2. Click **User Management**.
3. Select a user to activate.
4. Click **Activate**. The following message appears:  
*Do you want to activate the selected user(s)?*
5. Click **Yes** to confirm.

The user account is activated and a new password is generated for this user.

## 3.4 Searching for a Customer Support User

You can search for a Customer Support User in the Customer Management Portal. After searching for a Customer Support User, you can view or edit the user data, or activate or deactivate this user.

To search for a user, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **User Management**.
3. Click **Search**. The Search screen appears:



By default, all the users applicable to your role are listed. However, if you want to search for a specific user, complete the following steps:

---

**NOTE** In the following search fields, you need not specify the entire name as the Customer Management Portal searches for all names with the character you type. For example, if you type the first name as "ob". The search displays the users whose first names are 'Rob', 'Bob', 'Robert' and so on

**NOTE** If multiple search fields are selected, a search result that satisfies the criteria in all these fields is displayed.

---

4. In the **First Name** text box, type the first name.

---

**NOTE** The first name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

5. In the **Last Name** text box, type the last name.

---

**NOTE** The last name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

6. In the **Email ID** text box, type the email address.

7. In the **Phone No** text box, type the phone number.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567



8. In the **Company** text box, type the company name.
9. In the **Role** drop-down box, select the role.
10. Click **Go**.

## 3.5 Adding EMTT Customer Support User

An EMTT Customer Administrator or a Customer Administrator managing Short Code Campaign Requests can create an EMTT Customer Support User. This user can create and update a support ticket.

To add an EMTT Customer Support User, take the following steps:

1. Log onto Customer Management Portal.
2. Click **User Management** and click **Add**. The **Select the application** screen appears:

The screenshot shows a web interface with a navigation bar at the top containing three tabs: 'Provisioning Request', 'Support Ticket', and 'User Management'. Below the navigation bar, there is a main content area with a light gray background. At the top of this area, there are three numbered steps: '1. Application', '2. User Details', and '3. Preferences'. The '1. Application' step is highlighted with a yellow background. Below the steps, there is a heading 'Select the application'. Under this heading, there are two radio button options: 'Provisioning Request' and 'EM Trouble Ticket'. The 'EM Trouble Ticket' option is selected.

3. Select **EM Trouble Ticket** and then select **EMTT Customer Support**. Click **Next**.

---

**NOTE** If you do not find the EM Trouble Ticket option, contact Digital Interconnect to extend appropriate privileges to your role.

---

4. The User Details screen displays:



1. Application	2. User Details	3. Preferences	
Identity			
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Email ID:	<input type="text"/> @bazaz.com	Phone No:	<input type="text"/>

5. In the **First name** text box, type the first name.

---

**NOTE** The first name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

6. In the **Last name** text box, type the last name.

---

**NOTE** The last name must be of one to 15 characters that can have only alphabets and numbers. You cannot enter special characters and spaces.

---

7. In the **Email Id** text box, type the Email Id.

---

**NOTE** Ensure that you type only the user name of the Email ID as the domain name of your company is automatically appended to the email address.

---

8. In the **Phone No** text box, type the phone number.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567



1234567890EXT.1234567  
+14 1234567890Extension.1234567

Click **Next**.

9. The Preferences screen displays:

10. In the **Opt out of Survey** option, select **No** if you want to provide feedback for the EM Support Tool.

11. Click **Finish**.

The system generates password for the EMTT Customer Support User and sends it as an email to the user on the email id entered in this form.

---


**NOTE** The new user added to the system must change the system generated password during the first login. After the password is changed, the EMTT Customer Support User must re-login.

---

## 3.6 Updating User Records

The Super administrator and the Sale Support user can update Sales, Sales Support, Service, or Customer Administrator records.

To update a user record, complete the following steps:

1. Log onto Customer Management Portal.
2. On the **Manage Accounts** list, select a user record that needs to be updated.
3. Click  (Edit).
4. On the screen that opens, update the applicable fields.
5. Click **Submit**.

The user record is updated.



## 4 Short Code Campaign Management

### 4.1 Creating and Managing Short Code Campaigns

#### 4.1.1 Creating a New Campaign Request for US

A Customer Administrator or a Customer Support user can create a short code campaign request through the Customer Management Portal. This request is raised through a New Campaign Request form with multiple tabs. The customer can save the request and submit the completed form to Digital Interconnect later. The information entered in the tabs is saved and not submitted to Digital Interconnect by clicking the **Save** option. The customer must ensure that all the tabs are completed with relevant information and then submit the form by clicking the **Submit** option. This New Campaign Request form is then reviewed by Digital Interconnect before provisioning the short code with the carrier.

---

**NOTE** When you change the tab, the information in the tab that you are currently working on is automatically saved in the Customer Management Portal. To submit this form, it is mandatory to fill all fields on all tabs of this form.

---

To create a new program request, complete the following steps:

1. Log onto the Customer Management Portal.
2. In Campaign Management, click **New Campaign Request**. The New Campaign Request tab appears:





3. Click the **Campaign Details** tab.
4. In the **Short Code** text box, type the short code.

**NOTE** The short code is either a 4 or 6-digit number that is used for messaging. It is obtained by CSCA.

5. In the **Campaign Type** list, select the appropriate campaign type. The campaign types are described as follows:

Item	Description
Standard Rate SMS (Keyword Opt-In, One-Time Transaction)	Campaign that provides information on demand.
Standard Rate SMS (Keyword Opt-In, Subscription)	Campaign that a user subscribes through a keyword. The subscriber receives regular messages through the content provider as per the prescribed frequency.



Item	Description
Standard Rate SMS (Web/ App Opt-in, Subscription)	Campaign that a user subscribes through a website followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Standard Rate SMS (IVR Opt-In, Subscription)	Campaign that a user subscribes through a toll free number followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Standard Rate SMS (Paper Opt-In, Subscription)	Campaign that a user subscribes through a paper form followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Free to End User SMS	Campaign that a user subscribes through a mobile device. The subscriber is not charged for the messages.
SMS MO Opt-In with MMS MT	Campaign that a user subscribes through a mobile device by sending a keyword through SMS. The subscriber receives regular MMS through the content provider as per the prescribed frequency.
MMS MO Opt-in with SMS MT	Campaign that a user subscribes through a mobile device by sending an MMS image. The subscriber receives regular SMS from the content provider as per the prescribed frequency.
MMS MO Opt-In with MMS MT	Campaign that a user subscribes through a mobile device by sending an MMS image. The subscriber receives regular MMS from the content provider as per the prescribed frequency.

**NOTE** The receipt of SMS or MMS depends on the facility available in the device that is being used for short codes. Based on the Program



Type you select, additional fields relevant to the program type are displayed on this tab.

---

6. In the **Campaign Overview** text box, type an overview of your program.
  7. In the **Campaign Description** text box, type a description of your program.
- 

**NOTE** Ensure that the description is brief as this information is used for constructing CTA and other messages.

---

8. Select **Location based service** box, if you want to select a location-based service aggregator.
- 

**NOTE** The location-based service option enables you to type your custom messages in the Sample Messages tab.

---

9. If you select the **Location based service** box, you must select the LBS Aggregator for your campaign in the **LBS Aggregator** box.

10. In the **Application Type** list, ensure that the **New** option is selected.
- 

**NOTE** The **Update** option is selected when you are updating an existing campaign request.

---

11. In the **Campaign Name/Sponsor** text box, type the name of the company who will sponsor this program.
- 

**NOTE** Program sponsor information is used for constructing CTA and other messages.

---

12. In the **Date** box, type or select the **Start Date** and **End Date** of the program.
- 

**NOTE** The start date must be at least 6 weeks ahead from the day you submit this form to Digital Interconnect.

---

13. In the **Sub-sponsor** option, type the sub-sponsor who will sponsor this campaign. This option is available for Standard Rate SMS (Keyword Opt-In, One-Time Transaction), Standard Rate SMS (Keyword Opt-In, Subscription), Standard Rate SMS (Web/ App Opt-in, Subscription), Standard Rate SMS (IVR Opt-In, Subscription), Standard Rate SMS (Paper Opt-In, Subscription), and Free to End User SMS forms.
-



14. If an **Opt-In keyword** text box, type the keyword that a subscriber uses to participate in the campaign.

If an **Opt-In Method** field is displayed, you must upload the form that the subscriber fills to participate in the program.

If an **MMS MT** field is displayed, you must upload the MMS image that the subscriber sends to participate in campaign.

If an **MMS MO** field is displayed, you must upload the MMS image that is to be sent to the subscriber after entering campaign.

If an **Opt-In URL** text box is displayed, type a valid URL that a subscriber uses to participate in the campaign.

If an **Opt-In IVR** text box is displayed, type a valid toll-free number that a subscriber will call to participate in the campaign.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

15. In the Confirmation Keyword list, select Yes or the 4 digit PIN number that the subscriber uses to confirm participation request.

16. In the **Frequency of Messages** list, select the appropriate frequency of messages that are sent to a subscriber along with the time interval. If you select the **Other** option, type the appropriate frequency of messages in the **Frequency of Messages Other** text box.

---

**NOTE** The Other option is only valid for the Standard SMS (Keyword Information On Demand) campaign type.

---

17. The **Help keyword** field displays the keyword(s) subscribers can send to receive program help information. If the program is from Canada, keywords INFO and AIDE must be supported.



18. The **Opt-Out** Keyword field displays the keyword(s) subscribers can send to end communication with the campaign.
19. In the **Help Email** text box, type the email address that a subscriber uses to receive campaign assistance.

---

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

---

20. If there are sub-sponsors for your program, you can select the sub-sponsor option and add the information in this text box. You can add four sub-sponsors to the campaign request.
21. In the **Help Toll-free Number**, type the toll-free number that a subscriber can call to receive program assistance.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

22. In the **Sample Alert** text box, type the appropriate alert messages in Alert 1, Alert 2, and Alert 3 sections.
23. In the **Terms & Conditions URL** text box, type the URL that a subscriber uses to view the terms and conditions.

---

**NOTE** Ensure that you type a valid URL. This URL is used to construct messages on the **Sample Messages** tab.

---

24. In the **Privacy Policy URL** text box, type the URL that a subscriber uses to view the Privacy Policy.

---

**NOTE** Ensure that you type a valid URL. This URL is used to construct messages on the User **Experience** tab.

---

25. In the Customer Support Info section, select your support option from the **Primary Operational Contacts** options. The Customer Support Info section appears as follows:



Customer Support Info		Primary Operational Contacts		Support 1		Support 2	
<b>Support 1</b>				<b>Support 2</b>			
Email Address	<input type="text"/>	Email Address	<input type="text" value="salesupport@sap.com"/>	Toll free Number	<input type="text" value="800-219-7835"/>	WebSite URL	<input type="text" value="www.sap.com"/>
Toll free Number	<input type="text"/>						
WebSite URL	<input type="text"/>						
							<input type="button" value="Verify"/>
Additional Information	<input type="text"/>						

26. If you select **Support 2**, click **Verify** and go to step **30**. Else, perform from step **25** to step **30**.

27. In the **Email Address** text box, enter the email address that a subscriber can use to contact support.

---

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

---

28. In the **Toll free Number** text box, enter the toll free number that a subscriber can use to contact support. The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

29. In the **Website URL** text box, enter the website URL that a subscriber can view for support information.

---

**NOTE** Ensure that you type a valid URL.

---

30. Click **Verify**.

31. In the **Additional Information** text box, type any additional information that you want to use for customer support purposes.

32. An optional **Notes** text box appears if you select the **Location based service** option.



Notes

You can type any message relevant to the location based service. For example, you can type a negative MO message such as "You are not enrolled to receive any message from this program on this phone number."

33. Click **User Experience** tab. The User Experience screen displays:

Campaign Details
User Experience
Content Providers
Carriers
Service Types
Legal Concerns
Upload Documents
Message Traffic Projections

CTA

---

Opt in Step 1 User  MT  👁  
Add Negative MT

Opt in Step 2 MO  MT  👁  
✖  
 Negative MT  👁  
Remove Negative MT

Add Step

Sample Alert Alert 1  
Alert 2  
Alert 3  

Message 1/3
Message 2/3
Message 3/3

Help MO  MT  👁

Stop MO  MT  👁

The User Experience items are described as follows:

**NOTE** This tab automatically generates and displays messages in the standard format that is used for short code services. Only fields that are marked as editable 👁 can be edited by the Customer Administrator or a Customer Support User.

Item	Description
CTA (Call To Action)	Displays the message that is used for advertising on any of the media such as radio, television, or print media, and



Item	Description
	so on. This message is automatically generated after the Program Details tab is completed. You can edit this field to customize the message as per your requirement.
<b>Opt-in</b>	
Step 1	This is the first step in the two step Opt-in process. If you are subscribing for Web Recurring, IVR Recurring, or Paper Recurring services, you must go through a two-step Opt-in process. In the two step opt-in process, the subscriber will first receive an opt-in URL, phone number, or an MMS image that is entered in the Program Details tab.
Step 2	This is the first step in the two step Opt-in process. After the subscriber sends the Opt-in keyword, an acknowledgment is sent to subscriber with the confirmation on enrolling the subscriber to the campaign.
MO (Message Originated)	Displays the keyword used by a subscriber to subscribe to the campaign.
MT (Message Terminated)	Displays the subscription acknowledgement from the content provider sent to the subscriber of the campaign. This message can be edited as per the content provider's need. You can edit this field to customize the message as per your requirement.
Renewal Reminder	Displays the message that is sent to a subscriber for subscription renewal reminder.
Add Step	Enables you to add a step for you to opt in. You can add up to a total number of 5 steps to opt in.
Add Negative MT	In each opt in step, you can add a negative MT message to be displayed to the customer.





Item	Description
Remove Negative MT	Enables you to remove the negative MT message in the opt-in step.
<b>Sample Alert</b>	Displays the message that is sent as an alert to the subscriber. Based on the campaign type that is selected, the sample alert is either a text or an image.
<b>HELP</b>	
MO (Message Originated)	Displays the keyword used by a subscriber to get help about the campaign.
MT (Message Terminated)	Displays the message sent by the content provider as acknowledgment to un-subscription when the subscriber is unsubscribed from the campaign. You can edit this field to customize the message as per your requirement.
<b>STOP</b>	
MO (Message Originated)	Displays the keywords used by a subscriber to unsubscribe from the campaign.
MT (Message Terminated)	Displays the message sent by the content provider as acknowledgment to un-subscription when the subscriber is unsubscribed from the campaign. You can edit this field to customize the message as per your requirement.

34. Click **Content Providers** tab. The Content Providers screen appears:

New Campaign Request Save Submit

Campaign Details
User Experience
Content Providers
Carriers
Service Types
Legal Concerns
Upload Documents
Message Traffic Projections

**Content Provider**

Content Provider Company Name  Content Provider Contact Name

Content Provider E-mail Address  Content Provider Phone Number

**Application Provider**

Application Provider Company Name  Application Provider Contact Name

Application Provider E-mail Address  Application Provider Phone Number



35. In the **Content Provider Company Name** list, select the company name. If you select the **Other** option, you must type the Content Provider Company Name in the **Enter Content Provider Company Name** text box that appears.

---

**NOTE** The company name can include alphabets with blank space, '&' (ampersand), '.' (period), and '-' (hyphen).

---

36. In the **Content Provider Contact Name** text box, type the contact name for the content provider.

37. In the **Content Provider E-mail Address** text box, type the content provider's email address.

---

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

---

38. In the **Content Provider Phone Number** text box, type the content provider's phone number.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

39. In the **Application Provider Company Name** list, select the application provider company name. If you select the **Other** option, you must type the **Application Provider Company Name** in the **Enter Application Provider Company Name** text box that appears.

40. In the **Application Provider Contact Name** text box, type the contact name of the application provider.

41. In the **Application Provider E-mail Address** text box, type the email address of the application provider.

---

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

---



42. In the **Application Provider Phone Number** text box, type the phone number of the application provider.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

43. Click **Carriers** tab. The Carriers screen appears:

---

**NOTE** The carriers are classified as Tier 1, Tier 2, and Tier 3 based on their reach and customer base. Tier 1 carriers have more customer base compared to Tier 2 carriers and Tier 2 customers have more customer base compared to Tier 3 carriers. Ensure that you select the appropriate carrier for your campaign.

---



**New Campaign Request**
Save Submit

Campaign Details
User Experience
Content Providers
Carriers
Service Types
Legal Concerns
Upload Documents
Message Traffic Projections

**Tier 1**  select / unselect all

<input type="checkbox"/> AT&T	<input type="checkbox"/> Sprint/Boost/Virgin	<input type="checkbox"/> T-Mobile	<input type="checkbox"/> Verizon Wireless
-------------------------------	--	-----------------------------------	---

**Tier 2**  select / unselect all

<input type="checkbox"/> Cincinnati Bell Wireless	<input type="checkbox"/> Cricket (Leap)	<input type="checkbox"/> CellCom USA	<input type="checkbox"/> C Spire Wireless
<input type="checkbox"/> MetroPCS	<input type="checkbox"/> nTelos	<input type="checkbox"/> U.S. Cellular	

**Tier 3**  select / unselect all

<input type="checkbox"/> ACS Wireless	<input type="checkbox"/> Advantage Cellular (DTC Wireless)	<input type="checkbox"/> Appalachian Wireless	<input type="checkbox"/> Bluegrass Cellular
<input type="checkbox"/> Cellular Network Partnership (PIONEER)	<input type="checkbox"/> Cellular One of East Central Illinois	<input type="checkbox"/> Chat Mobility USA	<input type="checkbox"/> Coral Wireless (Mobi PCS)
<input type="checkbox"/> Element Mobile (Flat Wireless)	<input type="checkbox"/> Epic Touch (Elkhart Telephone)	<input type="checkbox"/> GCI Communications Corp	<input type="checkbox"/> Golden State Cellular
<input type="checkbox"/> Illinois Valley Cellular (IV Cellular)	<input type="checkbox"/> iWireless (IOWA Wireless)	<input type="checkbox"/> Nex-Tech Wireless	<input type="checkbox"/> MTA Communications
<input type="checkbox"/> MTPCS (Cellular One Nation)	<input type="checkbox"/> Cross Telephone Company (MBO Wireless)	<input type="checkbox"/> Duet IP (Maximum Communications. New Core Wireless)	<input type="checkbox"/> Inland Cellular Telephony Company
<input type="checkbox"/> Keystone Wireless LLC (Immix Wireless)	<input type="checkbox"/> Mosaic (Consolidated or CTC Telecom)	<input type="checkbox"/> Northwest Missouri Cellular Limited	<input type="checkbox"/> Peoples Wireless
<input type="checkbox"/> Panhandle Telecommunications Systems	<input type="checkbox"/> RINA	<input type="checkbox"/> Revol Wireless USA	<input type="checkbox"/> SI Wireless/Mobile Nation
<input type="checkbox"/> SRT Wireless	<input type="checkbox"/> Texas RSA 3 Ltd (Plateau Wireless)	<input type="checkbox"/> Thumb Cellular	<input type="checkbox"/> United Wireless

44. Select the carriers with whom you want to provision the short code.

**NOTE** Ensure that you select at least one carrier on this tab.

45. Click **Service Types** tab. The Service Types screen displays:

**New Campaign Request**
Save Submit

Campaign Details
User Experience
Content Providers
Carriers
Service Types
Legal Concerns
Upload Documents
Message Traffic Projections

<input type="checkbox"/> Alerts	<input type="checkbox"/> Charity	<input type="checkbox"/> Coupons/Advertising	<input type="checkbox"/> Consumer Packaging
<input type="checkbox"/> Sweepstakes or Contest	<input type="checkbox"/> iRadio	<input type="checkbox"/> Information on Demand	<input type="checkbox"/> In Venue
<input type="checkbox"/> Print/Outdoor	<input type="checkbox"/> Ringtones/Graphics/Wallpaper	<input type="checkbox"/> Voting/Polling	<input type="checkbox"/> Location Based Services

**Content Ratings**

<input type="checkbox"/> C7+	<input type="checkbox"/> T13+	<input type="checkbox"/> YA17+
------------------------------	-------------------------------	--------------------------------

Other



46. Select the service type that is apt for your campaign. You may also type any other service in the **Other** text box.

**NOTE** Ensure that you select at least one service type on this tab. If you select the **Sweepstakes** or **Contest** option, you cannot select any other service type.

47. Click **Legal Concerns** tab. The Legal Concerns tab contains options that must choose relevant to your campaign.

For example: If this short code campaign is for adults only, you can select the **Age Verification (18+)** option.

The Legal Concerns screen appears:

48. Select the legal concern option from the available list. If your legal concern is not listed in this tab, you can type this in the **Other** text box.

**NOTE** Ensure that you select at least one legal concern option on this tab.

49. Click **Upload Documents** tab. The Upload Document screen appears:

50. Upload the relevant documents. The following table shows the description for the documents that you can upload:




---

**NOTE** When you upload the document, the document is saved as part of the campaign request form. You do not have to click Save to save the uploaded document to the Campaign Request Form.

---

Item	Description
CSC Receipt	A receipt from CSC authority to confirm that the short code is granted for running the campaign.
CSC Migration letter	A letter from CSC that confirms that the content provider has notified CSC about the program aggregator migration.
Device Matrix	If the program is MMS based, then the support matrix contains the list of devices that can be used in the short code campaign.
Legal Intake form for sweepstakes	A legal document that shows details on legal concerns.
Marketing Materials	Any additional document with marketing information.
Miscellaneous	Any additional document that you want to upload. If there are multiple files, you can zip these files and then upload.
Privacy Policy	Document that contains information on the privacy policy that you want to apply for the short code campaign.
Sprint Vetting Document	If you are selecting the Sprint carrier, you must upload the Sprint vetting document.
Terms & Conditions	Document that contains information on terms and conditions that you want the subscriber to follow for the short code campaign.



51. Click **Message Traffic Projection** tab. The Message Traffic Projection screen appears:

The screenshot shows the 'Message Traffic Projections' tab in a 'New Campaign Request' form. The form contains the following fields:

- Media Impression**: A text input field.
- Expected Take Rate**: A text input field.
- # MO Messages Per Participants**: A text input field with 'per month' to its right.
- MT Messages Per Participants**: A text input field with 'per month' to its right.
- # MMS MT Messages Per Participants**: A text input field.

52. In the **Media Impression** text box, type the estimated number of people who view the advertisement of this program.

**NOTE** Ensure that you type an integer that does not exceed 8 digits.

53. In the **Expected Take Rate** text box, type the percentage of people who opt for this program after viewing the advertisement.

**NOTE** Ensure that you type an integer that does not exceed 3 digits and should be in from 1 to 100 only.

54. In the **# MO Messages Per Participants\*** text box, type the expected number of messages per month from the subscriber.

**NOTE** Ensure that you type an integer that does not exceed 8 digits.

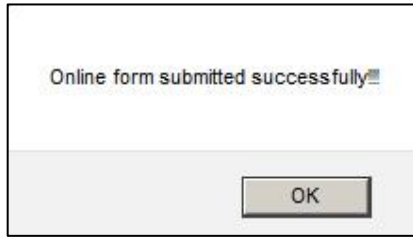
55. In the **MT Messages Per Participants\*** text box, type the expected number of messages each subscriber sends to participate in the campaign.

**NOTE** Ensure that you type an integer that does not exceed 8 digits.

56. In the **# MMS MT Messages Per Participants\*** text box, type the expected number of MMS MT messages each subscriber receives while participating in the campaign.

**NOTE** Ensure that you type an integer that does not exceed 8 digits. This text box is applicable for valid MMS campaigns only.

57. Click **Submit**. The following confirmation screen opens:



58. Click **OK**.

After you click Submit, the campaign request is submitted to Digital Interconnect for validation. In addition, an email notification is sent to the user who is creating this request and the Super Administrator in Digital Interconnect.

## 4.1.2 Creating a New Campaign Request for Canada

A Customer Administrator or a Customer Support user can create a short code campaign request through the Customer Management Portal. This request is raised through a New Campaign Request form with multiple tabs. The customer can save the request and submit the completed form to Digital Interconnect later. The information entered in the tabs is saved and not submitted to Digital Interconnect by clicking the **Save** option. The customer must ensure that all the tabs are completed with relevant information and then submit the form by clicking the **Submit** option. This New Campaign Request form is then reviewed by Digital Interconnect before provisioning the short code with the carrier.

---

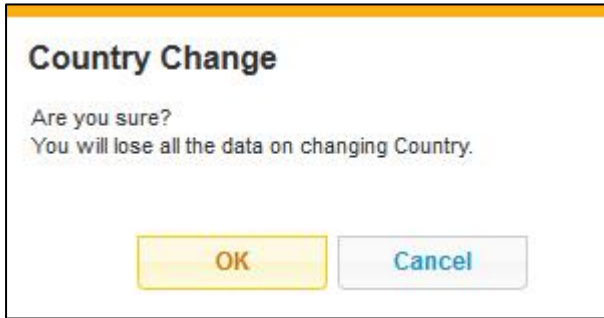
**NOTE** When you change the tab, the information in the tab that you are currently working on is automatically saved in the Customer Management Portal. To submit this form, it is mandatory to fill all fields on all tabs of this form.

---

To create a new program request for Canada, complete the following steps:

1. Log onto the Customer Management Portal.
2. In Campaign Management, click **New Campaign Request**.
3. In the **Select Country** box, select **Canada**.
4. When the following screen appears, click **OK**.





The New Campaign Request tab for Canada appears:

Campaign Management Select Country: Canada

---

Online Form Save Submit

**Campaign Details** Carriers Service Types Attachments

Short Code  Campaign Type Standard SMS (Keyword Information On Demand)

Campaign Overview  Campaign Name/Sponsor

Campaign Description

Start Date 01-28-2014 End Date

Help Email  Help Toll-free Number

Help Website  Verify

Where is it Promoted?

5. In the **Short Code** text box, type the short code.

**NOTE** The short code is either a 4 or 6 digit number that is used for messaging. It is obtained by the CWTA.

6. In the **Campaign Type** list, select the appropriate campaign type. The campaign types are described as follows:

Item	Description
Standard SMS (Keyword Information On Demand)	Campaign that provides information on demand.



Item	Description
Standard SMS (Keyword Recurring)	Campaign that a user subscribes through a keyword. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Standard SMS (Web Recurring)	Campaign that a user subscribes through a website followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Standard SMS (IVR Recurring)	Campaign that a user subscribes through a toll free number followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Standard SMS (Paper Recurring)	Campaign that a user subscribes through a paper form followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.

7. In the **Campaign Overview** text box, type an overview of your campaign.
8. In the **Campaign Description** text box, type a description of your campaign.
9. In the **Campaign Name/Sponsor** text box, type the name of the company who will sponsor this program.
10. In the **Date** box, type or select the **Start Date** and **End Date** of the campaign.

---

**NOTE** The start date must be at least 6 weeks ahead from the day you submit this form to Digital Interconnect.

---

11. In the **Help Email** text box, type the email address that a subscriber uses to receive campaign assistance.




---

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

---

12. In the **Help Toll-free Number**, type the toll-free number that a subscriber can call to receive program assistance.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

13. In the **Help Website** text box, enter the website URL that a subscriber can view for help information.
- 

**NOTE** Ensure that you type a valid URL.

---

14. In the **Where is it Promoted** text box, type the place where the short code is promoted.

15. Click **Carriers** tab. The Carriers screen appears:

Campaign Management Select Country Canada

Online Form Save Submit

Campaign Details **Carriers** Service Types Attachments

select / unselect all

Telebec Mobilite  ammy

16. Select the carriers with whom you want to provision the short code.
- 

**NOTE** Ensure that you select at least one carrier on this tab.

---

17. Click **Service Types** tab. The Service Types screen displays:



**Campaign Management** Select Country **Canada**

Online Form Save Submit

**Campaign Details** **Carriers** **Service Types** **Attachments**

<input type="checkbox"/> Alerts	<input type="checkbox"/> General Use	<input type="checkbox"/> Rich Content	<input type="checkbox"/> demo
<input type="checkbox"/> Chat (Adult)	<input type="checkbox"/> Information Services	<input type="checkbox"/> Subscription	<input type="checkbox"/> Mobile Marketing
<input type="checkbox"/> Chat (Non-Adult)	<input type="checkbox"/> Interactive Media	<input type="checkbox"/> Voting	<input type="checkbox"/> m-Commerce

Other

18. Select the service type that is apt for your campaign. You may also type any other service in the **Other** text box.

**NOTE** Ensure that you select at least one service type on this tab.

19. Click **Attachments** tab. The Attachments screen appears:

**Campaign Management** Select Country **Canada**

Online Form Save Submit

**Campaign Details** **Carriers** **Service Types** **Attachments**

Attach files here

20. Click **Upload** and attach the supporting document. You can upload any number of documents that support your campaign request.

After you click **Submit**, the campaign request is submitted to Digital Interconnect for validation. In addition, an email notification is sent to the user who is creating this request and the Super Administrator in Digital Interconnect.

### 4.1.3 Creating a New Campaign Request for Latin America

A Customer Administrator or a Customer Support user who has been assigned the region of Latin America can create a short code campaign request through the Customer Management Portal. This request is raised through a New Campaign Request form with multiple tabs. The customer can save the request and submit the completed form to Digital Interconnect later. The information entered in the tabs is saved and not submitted to Digital Interconnect by clicking the **Save** option. The



customer must ensure that all the tabs are completed with relevant information and then submit the form by clicking the **Submit** option. This New Campaign Request form is then reviewed by Digital Interconnect before provisioning the short code with the carrier.

---

**NOTE** When you change the tab, the information in the tab that you are currently working on is automatically saved in the Customer Management Portal. To submit this form, it is mandatory to fill all fields on all tabs of this form.

---

To create a new campaign request, take the following steps:

1. Log onto the Customer Management Portal.
2. In Campaign Management, click **New Campaign Request**. The New Campaign Request tab appears:

3. In the **Select Country** list, select the country from where the campaign is running.
4. In the **Short Code** text box, type the short code.

---

**NOTE** The short code is either a 4 or 6 digit number that is used for *messaging. It is Obtained by CSCA.*

---

5. In the **Campaign Type** list, select the appropriate campaign type. The campaign types are described as follows:



Item	Description
Standard Rate SMS (Keyword Opt-In, Subscription)	Campaign that provides information on demand.
Standard Rate SMS (Web/ App Opt-in, Subscription)	Campaign that a user subscribes through a website followed by a confirmation on mobile. The subscriber receives regular messages through the content provider as per the prescribed frequency.
Free to End User SMS	Campaign that a user subscribes through a mobile device. The subscriber is not charged for the messages.

6. In the **Campaign Overview** text box, type an overview of your campaign.
7. In the **Campaign Description** text box, type a description of your campaign.

---

**NOTE** Ensure that the description is brief as this information is used for constructing CTA and other messages.

---

8. In the **Campaign Name/Sponsor** text box, type the name of the company who will sponsor this campaign.

---

**NOTE** Program sponsor information is used for constructing CTA and other messages.

---

9. In the **Date** box, type or select the **Start Date** and **End Date** of the campaign.

---

**NOTE** The start date must be at least 6 weeks ahead from the day you submit this form to Digital Interconnect.

---

10. In the **Opt-In keyword** text box, type the keyword that a subscriber uses to participate in the campaign.
11. The **Opt-Out** Keyword field displays the keyword(s) subscribers can send to end communication with the campaign.



12. In the **Help Email** text box, type the email address that a subscriber uses to receive campaign assistance.

**NOTE** Ensure that you type a valid company help email address. You cannot type any other email address that is in the public domain such as gmail.com, facebook.com, yahoo.com, and so on.

13. In the **Help Toll-free Number**, type the toll-free number that a subscriber can call to receive campaign assistance.

The sample phone number formats that are accepted in this text box are as follows:

1234567890

123 456 7890

123-456-7890

+39 1234567890

+1 1234567890ext.1234567

1234567890EXT.1234567

+14 1234567890Extension.1234567

14. In the **Sample Alert** text box, type the appropriate alert messages in Alert 1, Alert 2, and Alert 3 sections. The Campaign Request form for sample alert section is as follows:

The screenshot shows a form titled 'Sample Alert' with a character count '45/160'. The 'Alert 1' section contains the text 'Para cancelar el servicio envíe BAJA al xxxxx'. Below this are four sections, each with a text input field and a 'Verify' button:

- Help Website
- Terms & Conditions URL
- Privacy Policy URL
- Additional Information

15. In the **Help Website** text box, enter the website URL that a subscriber can view for support information.

**NOTE** Ensure that you type a valid URL.

16. Click **Verify**.



17. In the **Terms & Conditions URL** text box, type the URL that a subscriber uses to view the terms and conditions.

**NOTE** Ensure that you type a valid URL. This URL is used to construct messages on the User Experience tab.

18. Click **Verify**.

19. In the **Privacy Policy URL** text box, type the URL that a subscriber uses to view the Privacy Policy.

**NOTE** Ensure that you type a valid URL. This URL is used to construct messages on the User Experience tab.

20. Click **Verify**.


21. In the **Additional Information** text box, type any additional information that you want to use for customer support purposes.

22. Click **User Experience**. The User Experience screen appears:

The screenshot shows the 'User Experience' tab in the Campaign Management interface. It includes the following elements:

- Header:** Campaign Management, Select Country: Argentina, Save, Submit buttons.
- Tabs:** Campaign Details, User Experience (active), Carriers, Service Types, Attachments.
- Opt in:** User: ALTA, MT: Usted se ha inscrito a recibir alertas SMS. (...)Para cancelar el servicio envia BAJA al xxxxx.
- Sample Alert:** Alert 1: Message 1/1, Para cancelar el servicio envia BAJA al xxxxx.
- Help:** MO: AYUDA, MT: (...)Para cancelar el servicio envia BAJA al xxxxx.
- Stop:** MO: BAJA, MT: Usted esta ahora confirmando parar de recibir mensajes de xxxxx.

The User Experience items are described as follows:

**NOTE** This tab automatically generates and displays messages in the standard format that is used for short code services. Only fields that are marked as editable  can be edited by the Customer Administrator or a Customer Support User.





Item	Description
<b>Opt-in</b>	
User	Displays the Opt-in keyword
MT (Message Terminated)	Displays the subscription acknowledgement from the content provider sent to the subscriber of the campaign. This message can be edited as per the content provider's need. You can edit this field to customize the message as per your requirement.
<b>Sample Alert</b>	Displays the message that is sent as an alert to the subscriber. Based on the campaign type that is selected, the sample alert is either a text or an image.
<b>HELP</b>	
MO (Message Originated)	Displays the keyword used by a subscriber to get help about the campaign.
MT (Message Terminated)	Displays the message that is sent to the subscriber with additional details of the campaign. You can edit this field to customize the message as per your requirement.
<b>STOP</b>	
MO (Message Originated)	Displays the keywords used by a subscriber to unsubscribe from the campaign.
MT (Message Terminated)	Displays the message sent by the content provider as acknowledgment to un-subscription when the subscriber is unsubscribed from the campaign. You can edit this field to customize the message as per your requirement.



23. Click **Carriers**. The Carriers screen appears:

24. Select the carrier that is used for your campaign.

25. Click **Service Types**. The Service Types screen appears:

26. Select the service type for your campaign.

27. Click **Attachments**. The Attachments screen appears:

28. Click **Upload**.

29. Browse or locate the attachment.

30. Click **Ok**.

31. Click **Submit**.

After you click **Submit**, the campaign request is submitted to Digital Interconnect for validation. In addition, an email notification is sent to the user who is creating this request and the Super Administrator in Digital Interconnect for Latin America region.



## 4.1.4 Editing a Saved Campaign Request

A Customer Administrator or a Customer Support User can edit an existing campaign request form that has been saved and not submitted to Digital Interconnect for validation.

To edit a saved campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Saved Campaign**. The Saved Campaign screen displays:

Campaign Management							
Saved Campaign							Search
Short Code	Campaign Name/Sponsor	Description	Country	Campaign Type	Start Date	End Date	Actions
333333	vc	vbnbn	US	Standard SMS (Keyword Recurring)	12/10/2013	12/18/2013	
			US	Standard SMS (Keyword Recurring)	12/10/2013	12/06/2013	
			US	Standard SMS (Keyword Information On Demand)	12/10/2013	12/06/2013	
			US	Standard SMS (Keyword Information On Demand)	12/10/2013	12/06/2013	
101010		mbnbnmbm	US	Standard SMS (Free To End User)	12/11/2013	12/26/2013	
			US	Standard SMS (Keyword Recurring)	12/10/2013	12/26/2013	
			US	Standard SMS (Free To End User)	12/10/2013	12/06/2013	
			US	Standard SMS (Free To End User)	12/10/2013	12/06/2013	
122334			US	Standard SMS (Free To End User)	12/10/2013	12/06/2013	

3. To update a short code, click (edit) in that row.
4. Edit the Campaign Request.
5. Click **Save** to save the form again or click **Submit** to submit the form to Digital Interconnect.



## 4.1.5 Searching for a Saved Campaign Request

When a Customer Administrator or Customer Support User creates a campaign request, the campaign request can be saved before submitting it to Digital Interconnect. If there are multiple campaign requests that are saved in the Customer Management Portal, you can search for a specific campaign request.

To search for a saved campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Saved Campaign**.
3. Click **Search**. The Search Screen appears:

4. You can search for a campaign request by entering any of the following fields:

**NOTE** In the following search fields, you need not specify the entire name as the Customer Management Portal searches for all names with the character you type. For example, if you type the first name as "ob". The search displays the users whose first names are 'Rob', 'Bob', 'Robert' and so on.

**NOTE** If multiple search fields are selected, a search result that satisfies the criteria in all these fields is displayed.

5. In the **Short Code** text box, type the short code that is to be searched.
6. In the **Sponsor Name** text box, type the sponsor's name to view all the campaign requests from this sponsor.
7. In the **Description** text box, type the description of the campaign request that is to be searched.
8. In the **Program Type** drop-down box, select the program type of the campaign request that is to be searched.
9. In the **Start Date** box, select or type the start date of the short code campaign request that is to be searched.



10. In the **End Date** box, select or type the end date of the short code campaign request that is to be searched.
11. In the **Country** list, select the country where the short code campaign request is to be searched.
12. Click **Go**.

## 4.1.6 Cloning a Campaign Request


If the information of an existing campaign request needs to be reused in a new campaign request, a Customer Administrator or a Customer Support User can clone an existing campaign request into a new campaign request. By cloning a campaign request, you can avoid filling existing information on the new campaign request and modify only the information relevant to your new short code program.

---

**NOTE** When you clone a campaign request, all information except the date will remain as per the existing campaign request. Also, the **Application Type** field on the **Program Details** tab changes to New.

---

To clone a campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**.
3. In the row that contains the campaign request that you want to clone, click  (clone program).
4. In the Campaign Request that appears, edit the relevant tabs and fields.
5. If you want to submit the cloned campaign request form to Digital Interconnect, click **Submit**. Else, click **Save**.

## 4.1.7 Extending the Duration of a Campaign Request

A Customer Administrator or a Customer Support User can extend the duration of a campaign request if the short code program duration has changed.




---

**NOTE** You can extend the duration of only running programs whose end date is not yet reached.

---

To extend the duration of a campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**.
3. In the row that contains the campaign request that you want to extend the duration, click  (extend program).
4. In the campaign request form that opens, select or type the End Date.
5. If you want to submit the extended campaign request form to Digital Interconnect, click **Submit**. Else, click **Save**.

After you submit this campaign request to Digital Interconnect, the **Application Type** in the **Program Details** tab changes from **New** to **Update**.

#### 4.1.8 Viewing Campaign Requests that Require an Action from Your Company

The Inbox page in the Customer Management Portal have requests that need some action from your company. The Customer Management Portal enables a Customer Administrator or a Customer Support User to view and take appropriate actions on these campaign requests.

To view campaign requests that require an action from your company, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Inbox**. The Program Requests screen appears:



Campaign Requests										
<input type="checkbox"/>	Short Code	Assigned To	Campaign Sponsor	Country	Campaign Brief	Status	Campaign Type	Start Date	End Date	Actions
<input type="checkbox"/>	0123	support customer	sybase	US	desc	Pending Carrier Approval	Standard Rate SMS (Keyword Opt-In, One-Time Transaction)	05/28/2014	10/05/2014	
<input type="checkbox"/>	000000	ashok bazaz	sybase	US	desc	Pending Carrier Approval	Standard Rate SMS (Keyword Opt-In, Subscription)	05/28/2014	10/05/2014	
<input type="checkbox"/>	949494	ashok bazaz	Main Sponsor	US	This is description	Pending Carrier Approval	Standard Rate SMS (Keyword Opt-In, Subscription)	06/04/2014	06/24/2014	

Showing 1-3 of 3

If there are more than ten records, you can browse through the pages and view all the short code campaign requests.

### 4.1.9 Searching for a Campaign Request after Submission

When you log into Customer Management Portal, the campaign requests are listed on the **Inbox** page of **Request Management** tab. You can browse through these short code campaign request or search for a specific campaign request that has been submitted to Digital Interconnect. In the Inbox page, you can only see the request that is awaiting action from your company. If you want to view or search all requests, then you must click **Search**.

To search for a campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**. The Search screen appears:

**Search**

Campaign Sponsor :       Short Code :       Campaign Type :

Assigned To :       Status :

Start Date :       End Date :

Country :

3. You can search for a campaign request by entering any of the following fields:

**NOTE** In the following search fields, you need not specify the entire name as the Customer Management Portal searches for all names with the character you type. For example, if you type the first name as "ob". The search displays the users whose first names are 'Rob', 'Bob', 'Robert' and so on.



**NOTE** If multiple search fields are selected, a search result that satisfies the criteria in all these fields is displayed.

---

4. In the **Sponsor Name** text box, type the sponsor's name to view all the short code campaign requests from this sponsor.
5. In the **Short Code** text box, type the short code that is to be searched.
6. In the **Program Type** list, select the program type of the short code campaign request to be searched.
7. In the **Assigned To** list, select the user to whom the short code campaign request is assigned.
8. In the **Status** list, select the status of the short code campaign request that is to be searched.
9. In the **Start Date** drop-down box, select or type the start date of the short code campaign request that is to be searched.
10. In the **End Date** drop-down box, select or type the end date of the short code campaign request that is to be searched.
11. In the **Country** list, select the country where the short code campaign request is to be searched.
12. Click **Go**.





## 5 Managing short code campaign after Submitting the Campaign Request to Digital Interconnect

### 5.1 About Request Workflow in Customer Management Portal

Workflow represents the flow of the campaign request between your organization and Digital Interconnect. The campaign requests for the short code is either created by a Customer Administrator or a Customer Support User in your organization. After the Customer Administrator or a Customer Support User submits this request to Digital Interconnect, Digital Interconnect reviews and validates your information and submits the requests to provision it with the carriers. The carriers and the Digital Interconnect sales support team communicate with each other to launch the campaign request.

The following table lists the workflow between your organization and Digital Interconnect:

From Organization	Operation	To Organization	Overall Status
Your Organization	Creates a campaign request. Submits the New Campaign Request.	Digital Interconnect	<i>Submitted</i>
Digital Interconnect	The Super Administrator assigns the campaign request form to a Sales Support User.	Digital Interconnect	<i>Submitted</i>



From Organization	Operation	To Organization	Overall Status
Digital Interconnect	The Sales Support User moves the campaign request status to <i>Under Review</i> while reviewing the campaign request.	Digital Interconnect	<i>Under Review</i>
	After the Digital Interconnect sales support team reviews the campaign request and If more information is required from your organization, the Sales Support User changes the status to <i>Need More Information</i> .	Your Organization	<i>Need More Information</i>
	If all information in the campaign request is complete, the Digital Interconnect sales support team moves the request to <i>Pending Carrier Approval</i> status. The Digital Interconnect sales support team then starts submitting this request to different carriers for provisioning.	Digital Interconnect	<i>Pending Carrier Approval</i>
Digital Interconnect	If the carriers require more information from your organization, the Digital Interconnect sales support team submits the campaign request form to your organization.	Carrier	<i>Carrier Needs More Information</i>



From Organization	Operation	To Organization	Overall Status
Your Organization	After adding the required information, you can resubmit the campaign request to Digital Interconnect.	Digital Interconnect	<i>Submitted Information Required</i>
Digital Interconnect	<p>If the campaign request information has been provided to the carrier, the Digital Interconnect sales team updates the campaign request status to <i>Pending Carrier Certification</i>.</p> <p>The status of this campaign request for your organization is displayed as <i>Ready for Certification</i>.</p>	Carrier	<i>Pending Carrier Certification</i>
Carrier	<p>If the campaign request fails certification, the carrier informs Digital Interconnect on the failure and Digital Interconnect updates the carrier status to <i>Failed Certification Needs More Information</i>.</p> <p>You must change the campaign request status to <i>Ready for Certification</i>.</p>	Digital Interconnect	<i>Failed Certification Needs More Information</i>



From Organization	Operation	To Organization	Overall Status
Digital Interconnect	The Digital Interconnect sales support team understands the reason for the failure in certification and provides the necessary information to the carrier. The Digital Interconnect sales support team updates the carrier status to <i>Submitted for Certification</i> .	Carrier	<i>Submitted for Certification</i>
Carrier	The carrier informs the Digital Interconnect sales support team that the short code has been provisioned. The Digital Interconnect sales support team updates the carrier status to <i>Live</i> .	Digital Interconnect	<i>Live</i>
Digital Interconnect	After all the carriers status is <i>Live</i> , the Digital Interconnect sales support team moves the campaign request status to <i>Launch Complete</i> . A launch complete email with complete campaign information is sent to your organization.	Digital Interconnect	<i>Launch Complete</i>
Customer	After <i>Launch Complete</i> is achieved and the campaign is over, the customer can send a request to close the campaign.	Digital Interconnect	Request to close



From Organization	Operation	To Organization	Overall Status
Digital Interconnect	After the request to close arrives from the customer, Digital Interconnect closes the campaign.	Digital Interconnect	Closed
Digital Interconnect	After the campaign request reaches its End Date, the Customer Management Portal automatically moves the Overall Status of this campaign request to Expired.	Digital Interconnect	<i>Expired</i>

## 5.2 Resubmitting a Campaign Request with Information for Digital Interconnect

If a campaign request needs more information from you, Digital Interconnect reverts the campaign request to you for more information. You can edit this campaign request by providing the necessary information and then resubmit this campaign request back to Digital Interconnect.

To resubmit a campaign request before the campaign request is submitted to the carrier for provisioning, complete the following steps:

1. Log onto the Customer Management Portal.
2. Search the campaign request to view the workflow history.

Or

Browse through the Program Requests and locate the short code campaign request.

3. Select the campaign request.



4. Click  (edit record). The Edit Workflow History tab appears:

[Submit](#)

**Request Details**

**Workflow History** | Assignment | Program Details | User Experience | Content Providers | Carriers | Service Types | Legal Concerns | Upload Documents | Customer Support Info

**Message Traffic Projection**

Overall Status: Need more information Note: For viewing individual carrier status, visit 'Carriers' tab.

Change Status to: --select-- Carrier: Sprint/Nextel/Boost/Virgin

Comments:

Carrier Status: Pending Carrier Approval

Change Carrier Status To: --select--

[Submit](#)

Carrier Status Summary	All	Tier 1	Tier 2	Tier 3
Total Carriers	2	2	0	0
Pending Carrier Certification	0	0	0	0
Carrier Needs More Information	0	0	0	0
Pending Carrier Approval	2	2	0	0
Live	0	0	0	0
Failed Certification Needs More Information	0	0	0	0
Submitted for Certification	0	0	0	0
Submitted Information Required	0	0	0	0
Ready For Certification	0	0	0	0

History							
Date	Action	Status Transition	Comments	First Name	Last Name	Company	Actions
07/23/2013 01:07 EDT	Status Changed	Under Review -> Need more information		CMP	Administrator	SAP	
07/22/2013 12:15 EDT	Annotation		test comment	CMP	Administrator	SAP	

5. Ensure that you complete the necessary information on the relevant tab.
6. In the **Change Status to** list, select **Re-submitted**.
7. In the **Comments** text box, type any relevant information.
8. Click **Submit**.

## 5.3 Moving the Campaign Request to Ready for Certification

After Digital Interconnect and the carrier verify that all the required information is provided, Digital Interconnect moves the status of the campaign request to *Pending Carrier Certification*. This state indicates that the carrier is ready to test the short code messages with your company. Therefore, you must make move the campaign request to Ready to Certification state to indicate Digital Interconnect and the carriers that you are ready to test the short codes. If the short code testing fails with the carrier, the carrier notifies Digital Interconnect on the failure. After Digital Interconnect takes the corrective measures, it changes the status of the carrier to




*Failed Certification Needs More Information.* Based on the actions specified for your company, you may take the corrective actions and then again move the campaign request status to ready for certification.

To move the campaign request to ready for certification, complete the following steps:

1. Log onto the Customer Management Portal.
2. Search the campaign request to view the workflow history.

Or

Browse through the Program Requests and locate the short code campaign request.

3. Select the campaign request.
4. Click  (edit record). The Edit Workflow History tab appears:

**Request Details**

**Workflow History** | Assignment | Program Details | User Experience | Content Providers | Carriers | Service Types | Legal Concerns | Upload Documents | Customer Support Info

Message Traffic Projections

Overall Status: Pending Carrier Approval Note : For viewing individual carrier status, visit 'Carriers' tab.

Change Status to:  Carrier:

Comments:

Carrier Status: Pending Carrier Certification

Change Carrier Status To:

Carrier Name	Changed Status
AT & T	Ready For Certification

Carrier Status Summary	All	Tier 1	Tier 2	Tier 3
Total Carriers	1	1	0	0
Pending Carrier Certification	1	1	0	0
Carrier Needs More Information	0	0	0	0
Pending Carrier Approval	0	0	0	0
Live	0	0	0	0
Failed Certification Needs More Information	0	0	0	0
Submitted for Certification	0	0	0	0
Submitted Information Required	0	0	0	0
Ready For Certification	0	0	0	0

5. In the **Change Carrier Status To** list, select **Ready For Certification**.
6. Click **Submit**.

The campaign request is submitted to Digital Interconnect to indicate that you are ready to test the short code with the carrier.



## 5.4 Reassigning a Campaign Request to a Customer Support User

If Digital Interconnect needs more information on a campaign request, it resubmits the campaign request to your organization. The Customer Administrator or the Customer Support User who created this campaign request receives this request. If the Customer Support User who created this request is not available, the Customer Administrator can reassign this campaign request to any other Customer Support User in the organization.

---

**NOTE** The user who is assigned to the campaign request receives all request updates through an email. Also, the Inbox of this user displays the campaign request if it needs the user's attention.

---

To reassign a campaign request to a customer support user, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**.  
Or  
Click **Request Management > Inbox**.
3. Select the campaign request that you want to reassign.
4. Click **Assign**. The Assign screen appears:

The screenshot shows a web interface for assigning a campaign request. It features a yellow header bar. Below the header, the word "Assign" is displayed in bold. There is a "Select User" label followed by a dropdown menu with "Select" as the current selection. At the bottom of the screen, there are two buttons: a grey "Cancel" button and an orange "Assign" button.

5. In the Select User drop-down box, select the user that you want to reassign this campaign request.
6. Click **Assign**. The following message appears:






*Selected record(s) successfully assigned*

7. Click **Ok**.

## 5.5 Requesting Digital Interconnect to Close a Campaign

After a campaign achieves Launch Complete status and the campaign is over, a Customer Administrator or a Customer Support User can request Digital Interconnect to de-provision the campaign.

To request Digital Interconnect to de-provision a campaign, complete the following steps.

1. Log onto the Customer Management Portal.
2. Click **Search**.
3. Locate the Campaign that you want to close.
4. Click  Edit Record.
5. In the **Change Status to** list of the Workflow History tab, select **Request to close**.
6. In the **Comments** text box, type your comments.
7. Click **Submit**.



# 6 Request Management

## 6.1 About Request Management

Request Management enables you to view all the short code campaign requests, search for a specific short code campaign request, and assign a request to any of the Digital Interconnect internal users. You can also export the short code campaign request information in a CSV or a TXT file. A Customer Administrator can use the **All in CSV** option to export all the requests assigned to the company.

## 6.2 Viewing the Campaign Requests

The Customer Management Portal enables the Customer Administrator and the Customer Support User to view the campaign requests assigned to the company.

To view the campaign requests, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Inbox**. The Program Requests screen appears:

Request Inbox										
Campaign Requests										
<input type="text" value="Search"/> <input type="button" value="Assign"/> <input type="button" value="Export"/>										
<input type="checkbox"/>	Short Code	Assigned To	Campaign Sponsor	Country	Campaign Brief	Status	Campaign Type	Start Date	End Date	Actions
<input type="checkbox"/>	012012	cust admin	fsdfdfs	US	fsdff	Pending Carrier Approval	Standard SMS (IVR Recurring)	12/10/2013	12/24/2013	
<input type="checkbox"/>	123123	cust admin	fdsfsd	US	fdsfsd	Need more information	Standard SMS (IVR Recurring)	12/12/2013	12/25/2013	
<input type="checkbox"/>	303030	cust admin	d	US	d	Need more information	Standard SMS (IVR Recurring)	12/26/2013	12/31/2013	
<input type="checkbox"/>	66666	cust admin	sdf	US	asdf	Need more information	MMS MO - MMS MT	01/03/2014	01/07/2014	
<input type="checkbox"/>	888888	cust admin	test	US	test	Need more information	MMS MO - MMS MT	01/03/2014	01/08/2014	
<input type="checkbox"/>	343443	cust admin	ggrf	US	vdgfdg	Need more information	MMS MO - MMS MT	01/06/2014	01/06/2014	
<input type="checkbox"/>	101010	cust admin	sdasd	US	ssdasd	Need more information	SMS MO - MMS MT	01/15/2014	01/28/2014	

If there are more than ten records, you can browse through the pages and view all the short code campaign requests.



## 6.3 Searching for a Campaign Request

When you log into Customer Management Portal, the short code campaign requests are listed on the **Request Management > Inbox** screen. You can browse through these short code campaign request or search for a specific short code campaign request.

To search for a campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**.

Or

Click **Request Management > Inbox** and click **Search**.

The Search screen appears:

3. You can search for a short code campaign request by entering any or all of the following fields:
  - In the **Sponsor Name** text box, type the sponsor's name to view all the short code campaign requests from this sponsor.
  - In the **Short Code** text box, type the short code that is to be searched.
  - In the **Program Type** list, select the program type of the short code campaign request to be searched.
  - In the **Assigned To** list, select the user to whom the short code campaign request is assigned.
  - In the **Status** list, select the status of the short code campaign request that is to be searched.
  - In the **Start Date** list, select or type the start date of the short code campaign request that is to be searched.
  - In the **End Date** list, select or type the end date of the short code campaign request that is to be searched.
  - In the **Country** list, select the country.
4. Click **Go**.



## 6.4 Assigning or Reassigning a Campaign Request to a User

A Customer Administrator can assign a short code campaign request to any other Customer Support User based on the workflow status.

To assign or reassign a campaign request to a user, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Request Management > Search**.  
Or  
Click **Request Management > Inbox**.
3. Either browse or search for the short code campaign request that has to be assigned to the user.
4. Select the short code campaign request that has to be assigned or reassigned.
5. Click **Assign**. The Assign Campaign Request screen appears as follows:

The screenshot shows a web interface titled "Assign". It features a label "Select User :" followed by a drop-down menu. The drop-down menu currently displays "Select". Below the drop-down menu, there are two buttons: a grey "Cancel" button and an orange "Assign" button. A mouse cursor is positioned over the "Assign" button.

6. In the **Select User** drop-down box, select a user.
7. Click **Assign**.

The short code campaign request is assigned to the selected user.



## 6.5 Viewing the Workflow History of a Campaign Request


Each short code campaign request has a workflow history that it follows. Based on the provisioning request lifecycle, a Customer Administrator or a Customer Support User can view the workflow history of a short code campaign request.

To view the workflow history of a campaign request, complete the following steps:

1. Log onto the Customer Management Portal.
2. Search for the short code campaign request that you want to view the workflow history.

Or

Browse through the Program Requests and locate the short code campaign request.

3. Select the short code campaign request.
4. Click  (view record). For US, the View Workflow History screen appears as follows:

**Request Details**

**Workflow History**
Assignment
Program Details
Sample Messages
Content Providers
Carriers
Service Types
Legal Concerns
Upload Documents
Customer Support Info

**Message Traffic Projection**

Overall Status:  Note : For viewing individual carrier status, visit 'Carriers' tab.

Change Status to:  Carrier:

Comments:

Carrier Status:

Change Carrier Status To:

**Carrier Status Summary**

	All	Tier 1	Tier 2	Tier 3
Total Carriers	2	2	0	0
Pending Carrier Certification	0	0	0	0
Carrier Needs More Information	0	0	0	0
Pending Carrier Approval	2	2	0	0
Live	0	0	0	0
Failed Certification Needs More Information	0	0	0	0
Submitted for Certification	0	0	0	0
Submitted Information Required	0	0	0	0
Ready For Certification	0	0	0	0

**History**

Date	Action	Status Transition	Comments	First Name	Last Name	Company	Actions
07/12/2013 05:38 EDT	Status Changed	Submitted -> Under Review		CMP	Administrator	Company1	

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For Canada, the View Workflow History screen appears as follows:

Workflow History
Assignment
Campaign Details
Carriers
Service Types
Attachments

Overall Status: Pending Carrier Approval Note : For viewing individual carrier status, visit 'Carriers' tab.

Change Status to: --select-- Carrier: Telebec Mobile

Comments:

Carrier Status: Pending Carrier Approval

Change Carrier Status To: --select--

Carrier Name Changed Status

---

**Carrier Status Summary**

	All
Total Carriers	2
Pending Carrier Certification	0
Carrier Needs More Information	0
Pending Carrier Approval	2
Live	0
Failed Certification Needs More Information	0
Submitted for Certification	0
Submitted Information Required	0
Ready For Certification	0

---

**History**

Date	Action	Status Transition	Comments	First Name	Last Name	Company	Actions
12/04/2013 07:23 EST	Status Changed	Under Review -> Pending Carrier Approval		CMP	Administrator	SAP	
12/04/2013 07:23 EST	Status Changed	Submitted -> Under Review		CMP	Administrator	SAP	

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# 7 Reports

## 7.1 About Reports

The Customer Management Portal enables you to generate reports and know the status of campaign requests. Following are the features that enable you create and view reports:

<b>Dashboard</b>	Enables you to view the reports that are added on this screen. .
<b>System Reports</b>	Enables you to generate various reports from the Customer Management Portal.
<b>Custom Reports</b>	Enables you to create a custom report.
<b>Schedule Reports</b>	Enables you to schedule a report.

## 7.2 About Dashboard

A Super Administrator can view the Dashboard, which displays the following pre-configured systems reports:

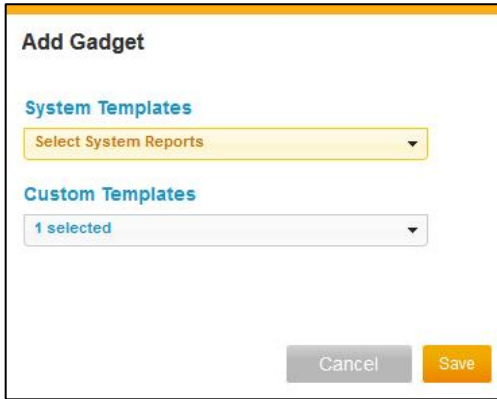
- Distribution Across Different Program Types
- Provisioning Statistics By Customer

You can view this report for US or for Canada by selecting it from the **Select Country** list. The Dashboard displays the reports as per the details available at that point of time. These reports can be moved and rearranged anywhere on the screen. Each report size can also be adjusted as per your convenience. The dashboard lets you view a single report by enabling you to maximize any of the report. You can restore the report size, minimize the report, or delete the report from the dashboard. To get the latest report, refresh the report. You can also add a custom or scheduled report to the dashboard.

To add a report on the dashboard, complete the following steps:



1. Click **Add Gadget**. The Add Gadget screen appears:



2. Select the appropriate templates.
3. Click **Save**.

## 7.3 About System Reports

System reports are reports that have a fixed format and you cannot control the output of this report. However, the Customer Administrator can select the reports that should appear on the dashboard or run a specific report from the System Report screen. The Customer Management Portal provides you with the following system reports:

Report Title	Description
Distribution Across Different Program Types	A report on the distribution of campaigns into different program types as a pie chart. All users of the Customer Management Portal can view this report.
Provisioning Statistics By Customer	A report on all campaigns for the selected customer. Only a Customer Administrator can view this report.





## 7.4 Creating a Custom Report

A custom report is configured to receive a report that is generated and sent to the user's email address. After creating a custom report, you can run, schedule, download, view, edit, or delete a custom report from the **Custom Reports** tab.

To create a custom report, complete the following steps:

1. Log into Customer Management Portal.
2. Click **Custom Reports**.
3. In the **Select Country** list, select US or Canada.
4. Click **Add New**. The Add New Custom Template screen appears:

5. In the **Report Title** text box, type the name of the custom report.

**NOTE** The report title is a mandatory field and it cannot be more than 80 characters.

6. In the **Description** text box, type the description.

**NOTE** The description is a mandatory field, and it cannot be more than 200 characters.



7. Based on your requirement, fill any of the fields that are mentioned as follows:
    - In the **Campaign Description** text box, type the campaign description.
    - In the **Campaign Name/Sponsor** text box, type the campaign name.
    - In the **Short Code** text box, type the short code.
- 

**NOTE** The short code is a 5 digit number that is used for messaging. It is Obtained by CSCA for USA or the CWTA for Canada programs.

---

- In the **Status** box, select the status.
  - In the **Assigned To Digital Interconnect Representative** box, select the Digital Interconnect representative.
  - In the **Assigned To Cust Representative** box, select the customer representative.
  - In the **Application Provider Company Name** text box, type the name of the company.
  - In the **Content Provider Company Name** text box, type the name of the company.
  - In the **Service Types** box, select the service type.
  - In the **Company Name** box, select the company.
  - In the **Program Type** box, select the program type.
  - In the **Legal Concerns** box, select the legal concern.
  - In the **Updated in period** box, select the appropriate period.
  - In the **Carriers** box, select the carriers.
  - In the date, select the period by selecting the **From** date and the **To** date.
  - In the **Output Device** box, select the output device.
  - In the **Output Format** box, select the output format.
  - Click **Display Columns** and select the field names that need to be displayed on the report.
8. Click **Save as Template**.



## 7.5 Scheduling a Report

The Customer Management Portal allows you to schedule a report. All users of the Customer Management Portal can schedule a report. The scheduled reports appear in the **Schedule Reports** tab. In this **Schedule Reports** tab, you can delete, view, or download the scheduled report. The report that is scheduled can be delivered to your email address if the output device is configured as email.

To schedule a report, complete the following steps:

---

**NOTE** All the fields in this form are mandatory.

---

1. Log into Customer Management Portal.
2. Click **Schedule Reports**.
3. In the **Select Country** list, select US or Canada.
4. Click **Schedule New**. The Add New Schedule screen appears:

**Add New Schedule**

Schedule Name

Select Template Select Template ▼

Frequency Select Frequency ▼

Start Date and Time

End Date and Time

5. In the **Schedule Name** text box, type the name of the schedule.

---

**NOTE** The Schedule Name cannot be more than 60 characters.

---

6. In the **Select Template** box, select the template that you want to schedule.
7. In the **Frequency** box, select the frequency of the schedule.



8. In the **Start Date and Time** box, select the start date and time.

---

**NOTE** Ensure that you select any date that is after today and any time that is after the system time that is being displayed now.

---

9. In the **End Date and Time** box, select the end date and time.

---

**NOTE** Ensure that you select any date that is after today and the scheduled start date. Ensure that you select the time that is after the system time that is displayed now and the scheduled start time.

---



## 8 Administration

### 8.1 Viewing your Profile

The Customer Management Portal enables you to view your profile.

To view your profile, complete the following steps:

1. Log onto the Customer Management Portal.
2. Click **Profile**.

### 8.2 Changing Profile Password

After you log into the Customer Management Portal for the first time, you must change the password.

To change your profile password, complete the following steps:

1. Log into the Customer Management Portal.
2. Click **Change Password**.

---

**NOTE** If you are a new user, the change password screen appears as soon as you log onto the Customer Management Portal.

---

The Change Password screen appears:

**Change Password**

Old Password:

New Password:

Retype Password:

3. In the **Old Password** text box, type the existing password.



4. In the **New Password** text box, type the new password.

---

**NOTE** The password must be at least 8 characters with a number and a special symbol.

---

5. In the **Retype Password** text box, retype your new password.
6. Click **Change**.

After the password is changed, you must re-login with your new credentials when the Customer Management Portal prompts you.

## 8.3 Logging out of the system

To log out of the system, click **Log off CMP**.