



# Contact Management User Guide

## Network Edition

Version 4.0

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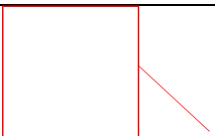

8.2 Receiving a PSC response

## 1. Introduction

This User Guide is designed to provide a clear understanding of the Contact Management Service. This guide contains:

- How to log on to the system and accessing the Contact Management homepage
- Raising Contacts, managing the responses
- How to conduct searches
- File responses

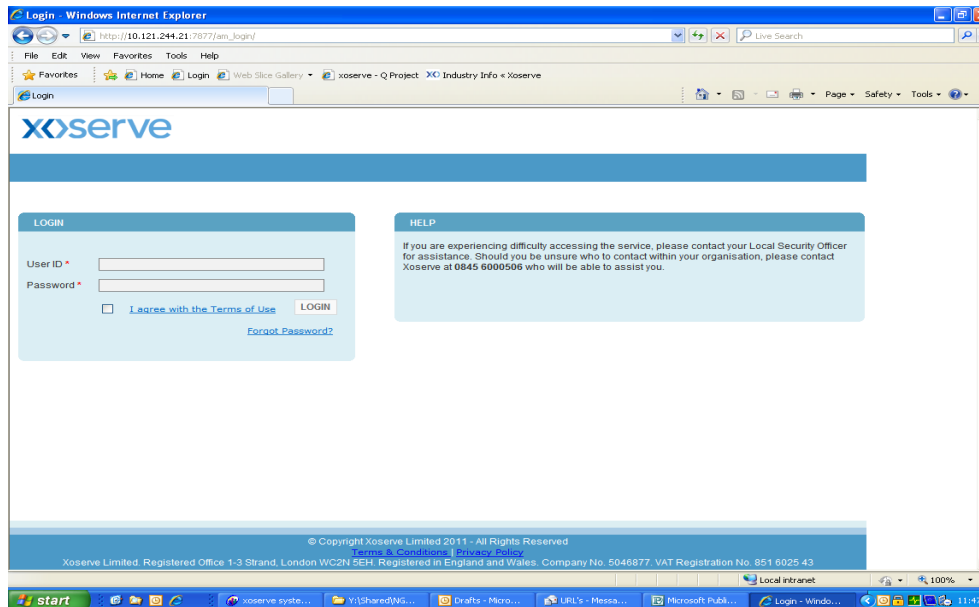
There are a number of symbols throughout this guide; the symbols and their meaning are included below:

	Information
	Warning
	Area of interest
	Mouse click required
	Keyboard entry required

## 2. Log onto Contact Management

### 2.1 Log onto the Contact Management System

The portal Login Page looks as follows:

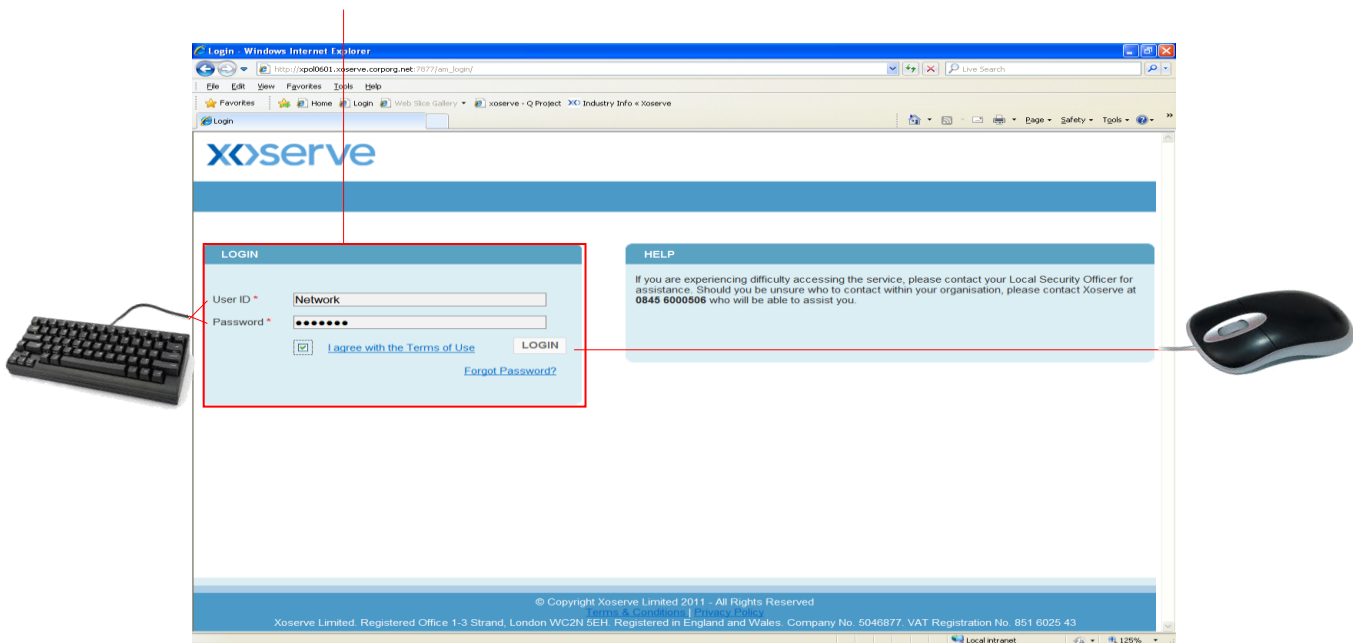


Step 1 – Enter your User ID

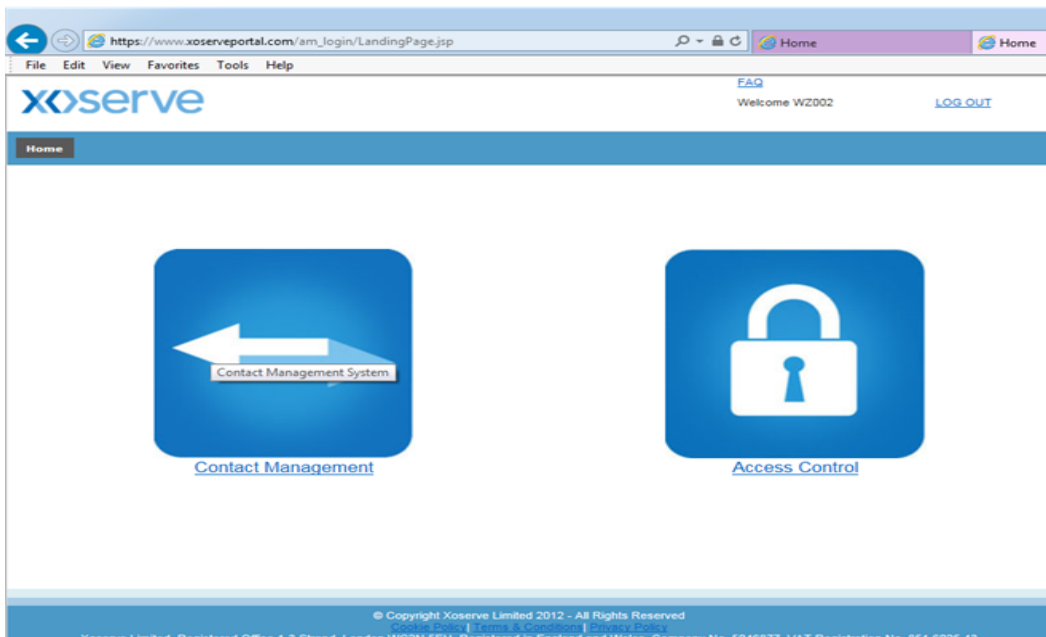
Step 2 – Enter your Password

Step 3 – Tick the box to agree to the Terms of Use

Step 4 – Click Login



The following Service Page will appear:

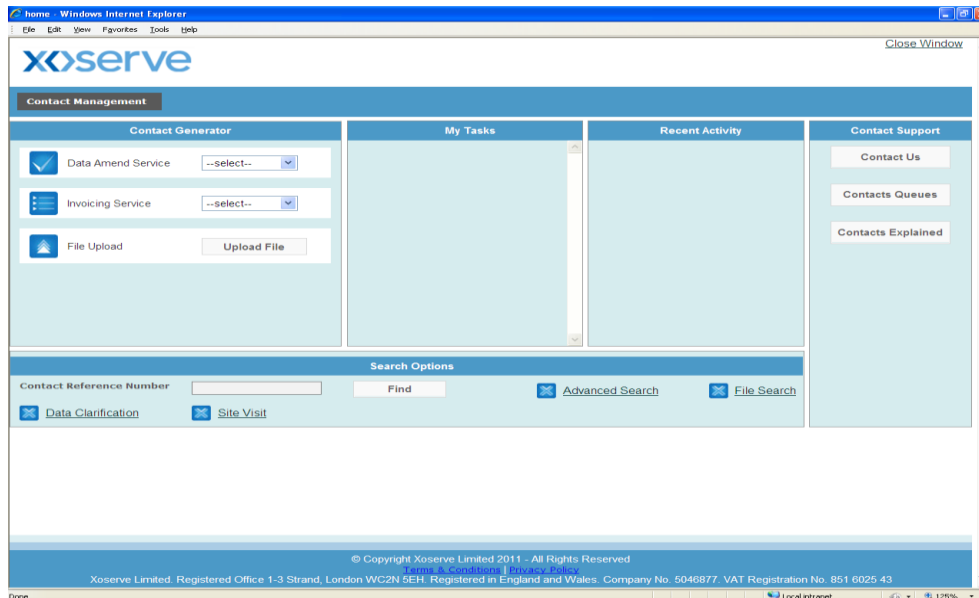


There are two services on this page:

- Contact Management
- Access Controls

Click contact Management to take you to the Contact Management homepage. Clicking the Xoserve logo will take you to our website, Xoserve.com.

## 2.2 Contact Management Homepage



The Contact Management home page incorporates 5 different areas within the system, these are:

## Zone 1

Contact Generator – This section holds a list of Contacts that can be raised via the Contact Management system. The Contacts are separated into two services – Data Amend Service and Invoicing Service.

Contacts can be raised as single Contacts selecting the relevant Contact code or in bulk via File Upload.

## Zone 2

My Tasks – This section includes all tasks sent directly to you or you have assigned to yourself

## Zone 3

Recent Activity – This section details the last 10 actions you have performed. For example, raising a Contact and responding to a Data Clarification (DC).

## Zone 4

Contact Support – This area is made up of Contact Us, Contact Queues and Contacts Explained. Contact Us details useful contact details for some of the services that Xoserve provide. Contacts Queues takes you to an area that lists outstanding Contacts for your organisation that require resolution. Contacts Explained outlines each process, mandatory data and helpful information.

## Zone 5

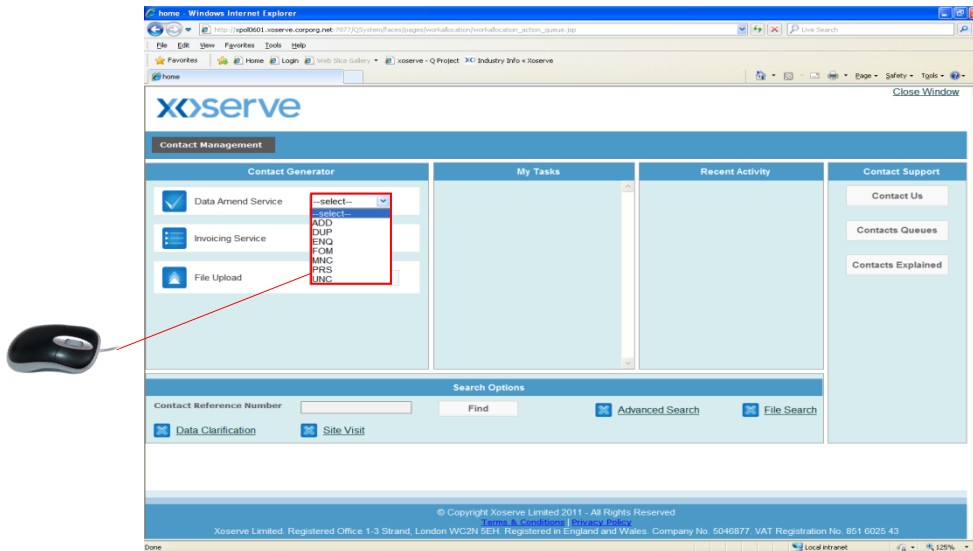
Search Options – This section includes a variety of search facilities. Contact Reference Number Search, Advanced Search and File Search will find contacts raised in The Contact Management system.

Data Clarification Search and Site Visit Search returns Contacts that are currently at DC or SV stage of the process.

### 3. Log a Contact

#### 3.1 Log a Contact via Screen

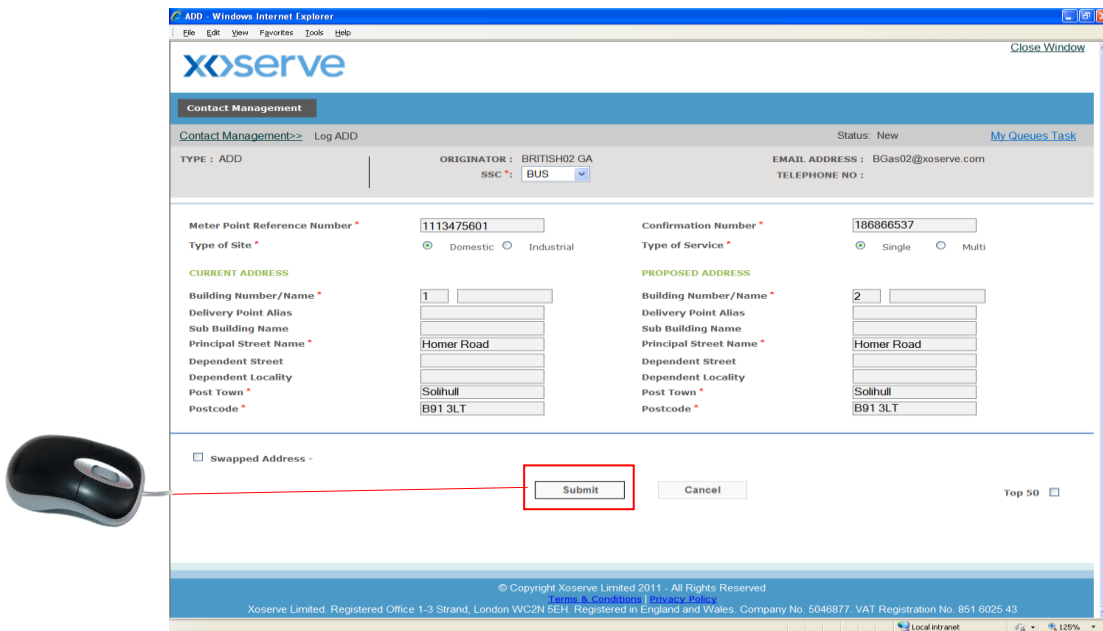
Select the relevant Contact Code from Data Amend Service or Invoicing Service.



The Contact form is presented to you. Enter the mandatory and relevant data. All mandatory data is identified by \*.



After entering some information, there may be a slight delay as the Contact Management system will be validating against our source systems. This will occur across a number of Contact Types.



The system will tell you real time if you entered incorrect details into the form.

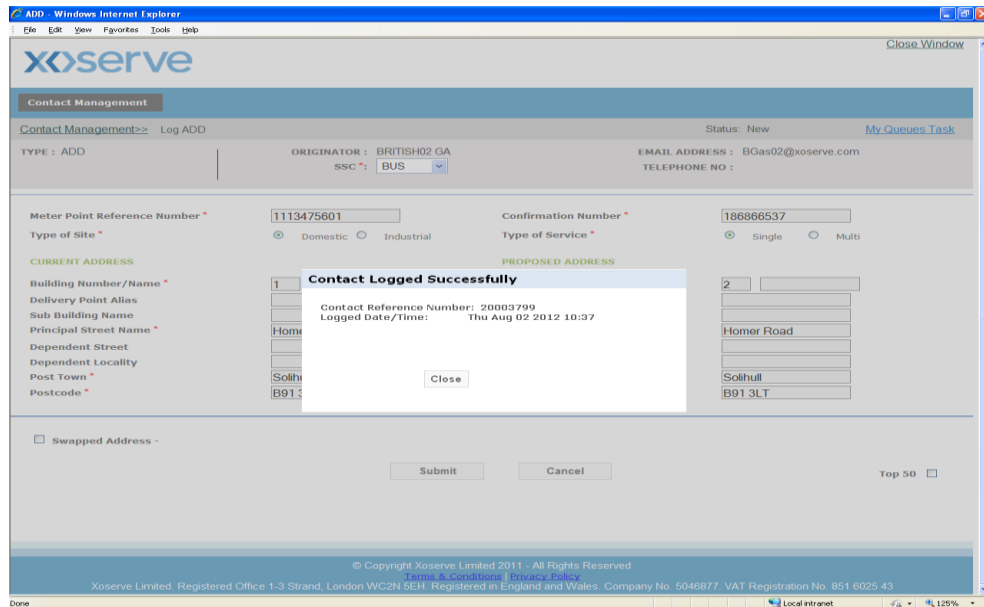


Close Window will take you to the Services Page. If you want to revert to the Contact Management homepage, click Cancel.



Once a Contact has been logged successfully, the following message will appear. It will show....

- A Confirmation that the Contact has been logged successfully
- The Contact Reference Number
- The date and time of your submission



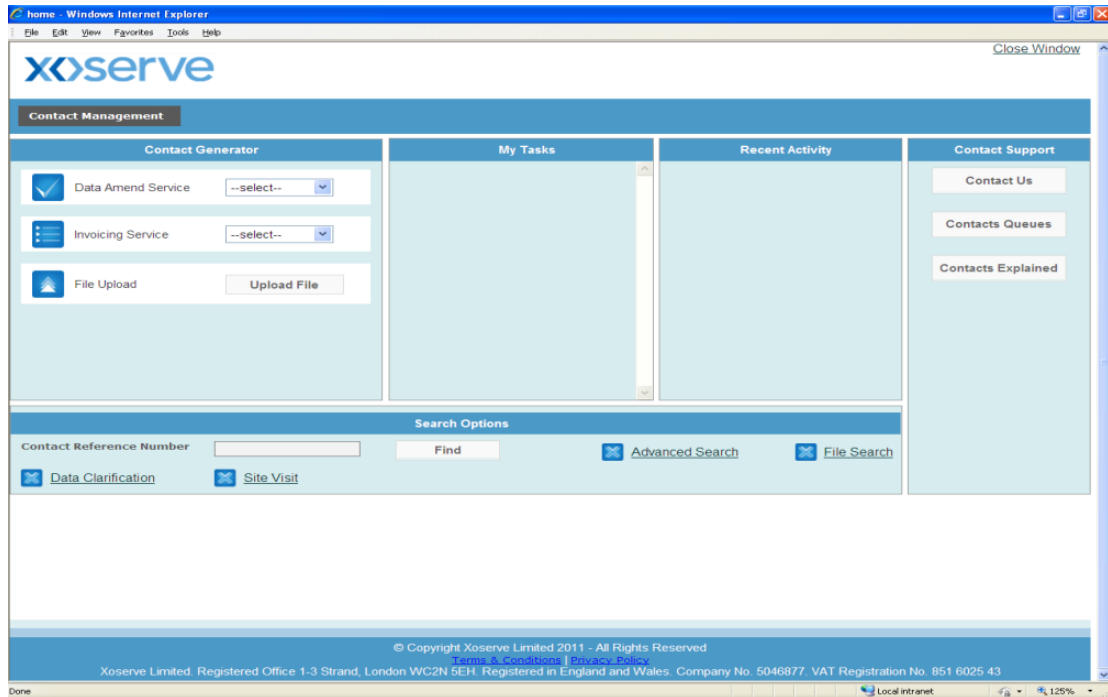
You may want to make a note of the Contact Reference Number, however you will see it appear in 'Recent Activity' on the Contact Management home page.

### 3.2 File Upload

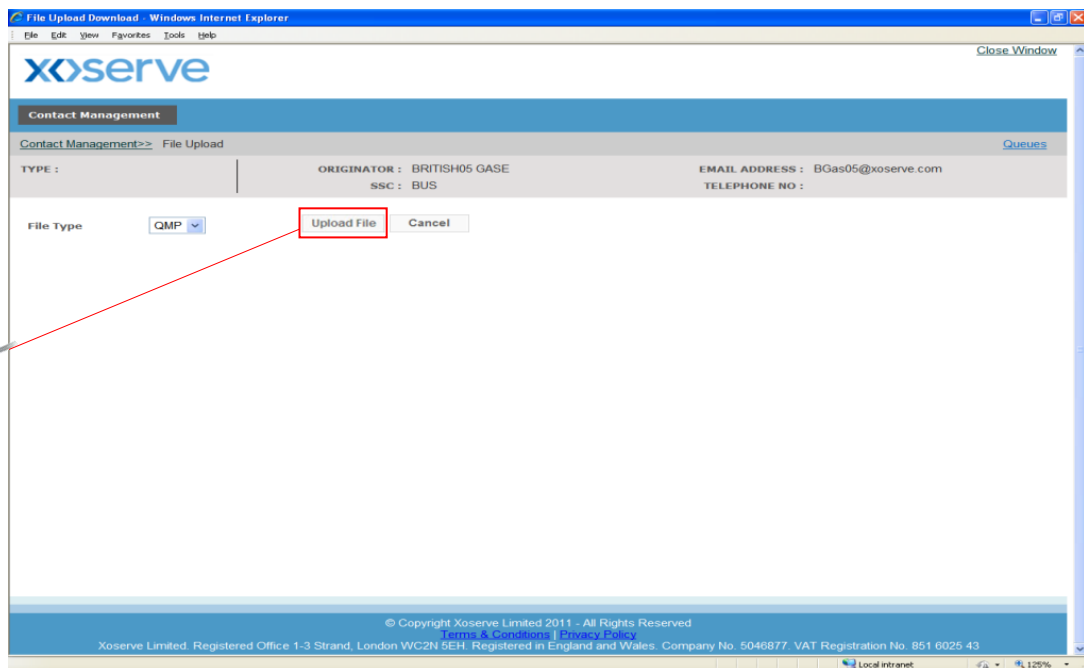
This is a standard EFT template, the red fields highlight the mandatory data required for the Contact type. You can select multiple Contact types per template. This example is highlighting the ADD process.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
2	V1.0 Xoserve	QMP [M] [T3]	Stakeholder ID [M] [N10]	Originator Code [M] [T3]	Stakeholder Personnel's Name [M] [T80]	Stakeholder Reference Identifier [O] [T30]	User ID [M] [T20]	Contact Code [M] [T3]	Top 50 flag [O] [T1]	Domestic vs Industrial Indicator [CM] [T1]	Contact Explanation [CM] [T2000]	Confirmation Number [CM] [N9]	Meter Point Reference Number [CM] [N10]	Meter Point AQ [CM] [N12]
3	Check	OMP	434	BUS	Mr Smith		JS125	ADD						
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														

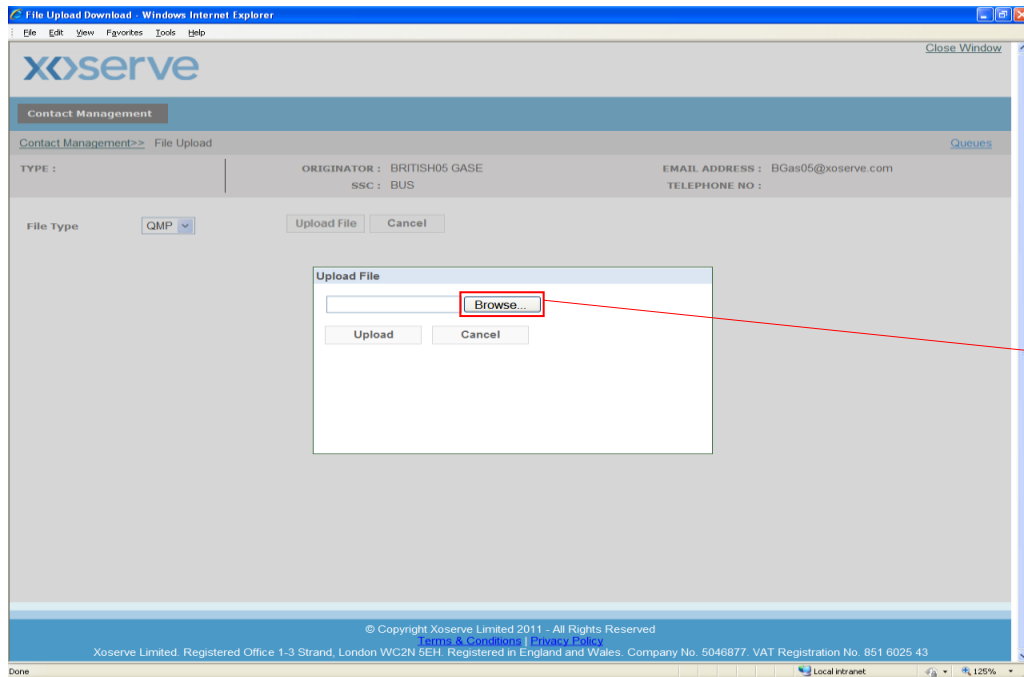
Once the EFT template has been completed successfully and all mandatory information has been entered Column A will change from red to green. You can then upload your template to the system using the file upload shown on the Contact Management home page.



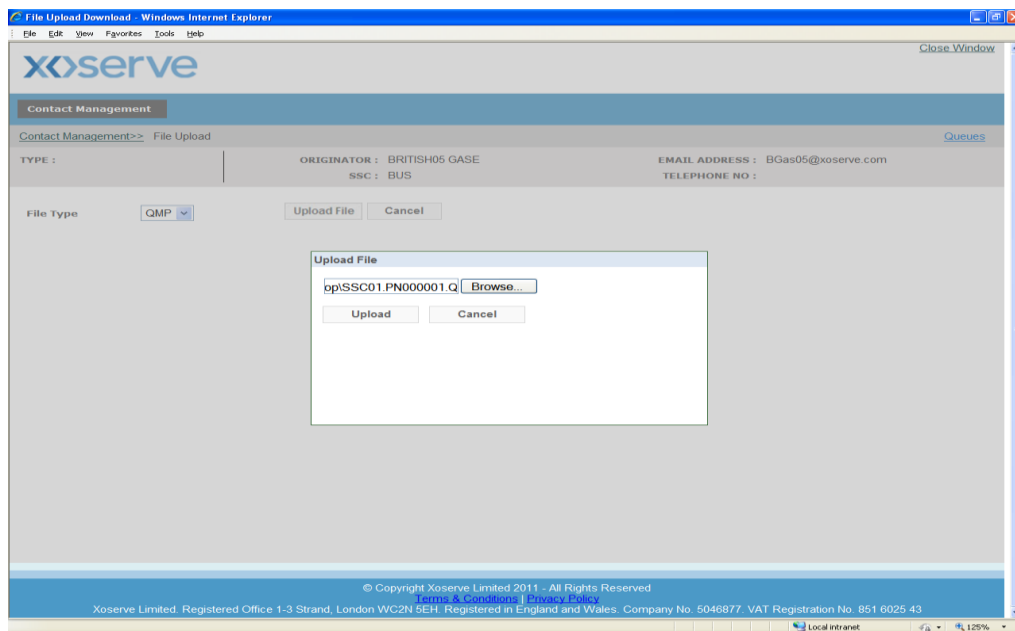
The File Type will be showing as QMP, this is the format required to submit your file to Xoserve.



Send File Upload and the File Upload screen will appear...



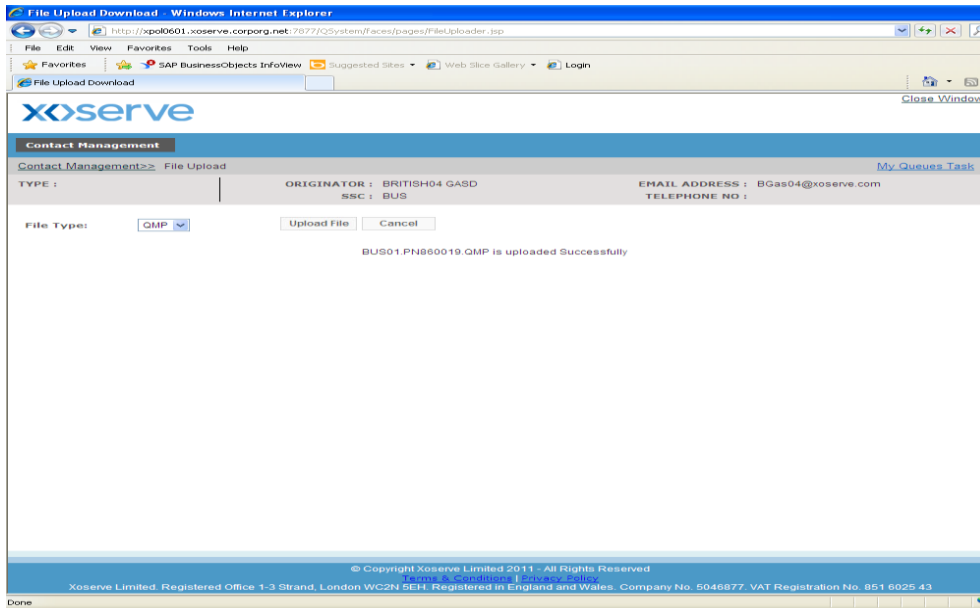
Select browse and you will be taken to a relevant area where your files are saved. Select the file and Open, this will appear in the box next to Browse.



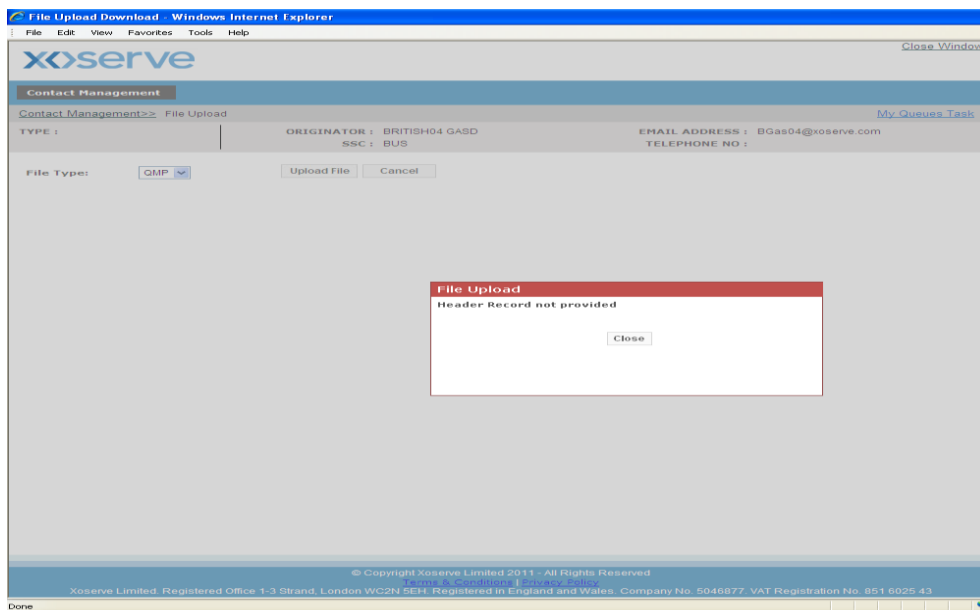
Select Upload, and the file is submitted.

You will receive a message at this point stating whether the submission has successfully loaded or rejected.

A successfully submitted file will show as follows...



An unsuccessfully submitted file will show as follows...



There are a number of reasons why a file might reject. There are held under the Contacts Explained Guide.

### 3.3 Top 50 Contact

When raising a Contact to Xoserve, you can select 'Top 50'. This would denote to Xoserve that the Contact raised is one of your priorities for the month.

ADD - Windows Internet Explorer

**xoserve**

Contact Management

Contact Management-> Log ADD Status: New My Queues Task

TYPE : ADD ORIGINATOR : BRITISH02 GA EMAIL ADDRESS : BGas02@xoserve.com  
SSC : BUS TELEPHONE NO :

Meter Point Reference Number \* 1113475001 Confirmation Number \* 188866537  
Type of Site \* Domestic Industrial Type of Service \* Single Multi

CURRENT ADDRESS PROPOSED ADDRESS

Building Number/Name \* 1 Building Number/Name \* 2  
Delivery Point Alias  
Sub Building Name  
Principal Street Name \* Homer Road Principal Street Name \* Homer Road  
Dependent Street  
Dependent Locality  
Post Town \* Solihull Post Town \* Solihull  
Postcode \* B91 3LT Postcode \* B91 3LT

Swapped Address -

Submit Cancel

Top 50

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Each organisation can raise a maximum of 50 'Top 50' Contacts per month. You will see the following message once it is submitted showing that it is a Top 50 Contact and will also show your organisation's remaining balance for the month.

DUP - Windows Internet Explorer

**xoserve**

Contact Management

Contact Management-> Log DUP Status: New My Queues Task

TYPE : DUP ORIGINATOR : BRITISH02 GA EMAIL ADDRESS : BGas02@xoserve.com  
SSC : BUS TELEPHONE NO :

Classification of Site \* UKLDUP Confirmation Number \* 162890443  
Meter Point Reference Number to Retain \* 9178595705 Meter Point Reference Number to Remove \* 9153205706  
Type of Site \* Domestic Industrial End User Contract \* Yes No

Contact Explanation

**Contact Logged Successfully**

Contact Reference Number: 20003791  
Logged Date/Time: Thu Aug 02 2012 08:51  
Flagged as Top 50: YES  
Considered as Top 50: YES  
Top 50 Priorities Used: 1  
Top 50 Priorities Remaining: 49

your contact)

Top 50

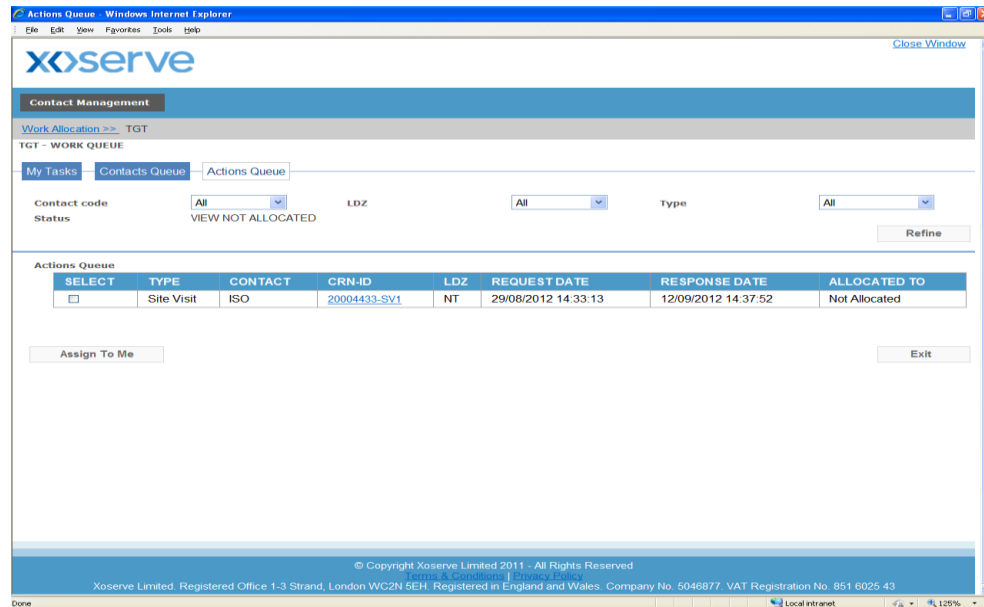
Close

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## 4. Contacts Queue

### 4.1 Contact Queue Overview - User

When selecting Contacts Queue in the Contact Support section on the Contact Management home page, you are taken to the Contact Queues and work outstanding. This will show as follows....



The screenshot shows a web browser window titled 'Actions Queue - Windows Internet Explorer'. The page displays the Xoserve logo and a navigation menu with 'My Tasks', 'Contacts Queue', and 'Actions Queue'. Below the navigation, there are filter options for 'Contact code', 'Status', 'LDZ', and 'Type'. A table titled 'Actions Queue' is visible, containing one row of data. Below the table are buttons for 'Assign To Me' and 'Exit'. The footer contains copyright information for Xoserve Limited.

SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	<a href="#">20004433-SV1</a>	NT	29/08/2012 14:33:13	12/09/2012 14:37:52	Not Allocated

The area is made up of three queues. This view illustrates that you have selected the Action Queue.

#### My Tasks

This table is linked to the My Tasks zone on the Contact Management home page. It provides additional information in order to help you prioritise.

#### Contacts Queue

This is a queue that is visible to all Users. This queue includes all Contacts raised by your organisation.

#### Action Queue

This is a general queue holding a number of Contacts that have been investigated by Xoserve and require further attention from yourselves. The Contacts within this Queue may be the result of a Contact raised by a Shipper.



If you are seeking a specific Contact, the Actions Queue has filters to help identify this Contact.

## 4.2 Assigning a Contact - User

The Contacts Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue may be as a result of a Contact raised by a Shipper, e.g. Data Clarification or Site Visit.

Assign a Contact

Step 1 – Find the Contact in the queue

Step 2 – Click the box in the 'SELECT' Column. Once a tick is showing in the box,

Step 3 – Click Assign To Me.

This Contact will then be moved to your 'My Task' queue and can be worked upon.



When assigning a Contact, you can select one or multiple Contacts at a time.

## 4.3 Transferring Contacts - User

### My Tasks

Transfer a Contact to the Action Queue

Step 1 – Find your Contact via the Contacts queue

Step 2 – Click the box for this Contact

Step 3 – Click Transfer to Queue

SELECT	ELEMENT	CONTACT	CRN-ID	SSC	REQUEST DATE	RESPONSE by DATE	LOGGED DATE	ALLOCATED TO
<input checked="" type="checkbox"/>	Site Visit	ISO	20004433-SV1	TCG	29/08/2012 14:37:52	12/09/2012 14:37:52	29/08/2012 14:33:13	TGT05

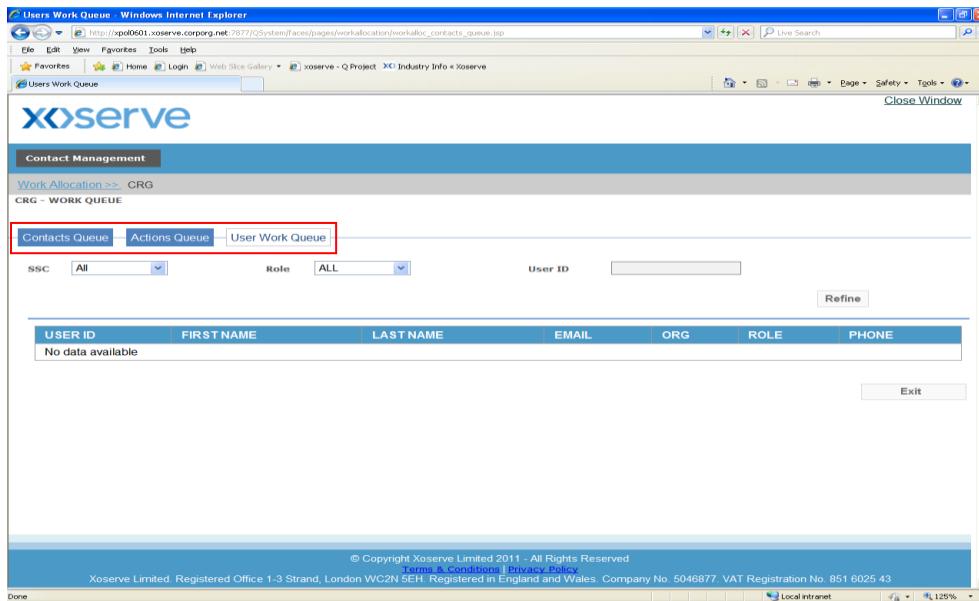
This will then appear in the Action Queue and can be worked upon by another person.



When transferring a Contact, you can select one or multiple Contacts at a time.

## 4.4 Contact Queue Overview - Supervisor

When selecting Contacts Queue in the Contact Support section on the Contact Management home page you are taken to the Contacts Queue.



The area is made up of three queues. This view illustrates that you have selected the User Work Queue.

Contacts Queue – This is a queue that is visible to all Users. This queue includes all Contacts raised by your organisation.

Actions Queue – This is a general queue holding a number of Contacts that have been investigated by Xoserve and require further attention from yourselves. The Contacts within this Queue may be the result of a Contact raised by a Shipper

Users Work Queue – This queue lists the Users within the organisation and information relating to the User. Once a team member is selected, the current work they have in their 'My Tasks' becomes visible.



If you are seeking a specific Users Work Queue, enter the User ID into the field and this will bring back the relevant User only.

## 4.5 Transferring Contacts - User

### Actions Queue

A Supervisor can allocate a Contact to themselves or to another colleague within the organisation. Contacts can be allocated from the Actions Queue.

#### Assigning a Contact

Step 1 – Find the Contact in the queue

Step 2 – Select the box for this Contact. Once a tick is visible in the box



Step 3 – Assign to a User by clicking ‘Allocate to User’.

Step 4 – A drop down menu will appear including all Users in the organisation.  
Choose a User

Step 5 – Click Assign to the Above User; this contact will then be moved into the User’s My Task queue and can be worked upon.

The drop down list will include yourself as a Supervisor. Allocation of a Contact will work exactly the same, select the User ID and then Assign to Above User.

Once a Contact has been assigned the Contact will also update in the chosen person’s Work Queue.

#### 4.6 Transferring Contacts - Supervisor

As a Supervisor you have the ability to retrieve a Contact from a team member’s My Tasks and place into the Action Queue so another team member can work on the Contact.

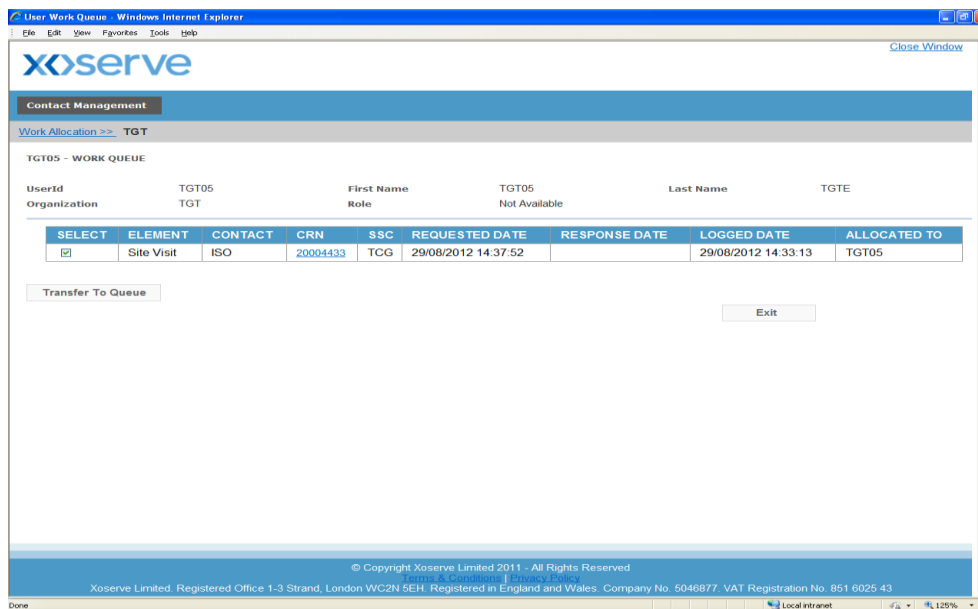
Step 1 – Select Contacts Queues on the Contact Management home page

Step 2 – Select User’s Work Queue

Step 3 – Select the relevant User

Step 4 – Click the box for the Contact you want to transfer

Step 5 – Select Transfer to Queue



The screenshot shows a web browser window titled 'User Work Queue - Windows Internet Explorer'. The page displays the 'Contact Management' interface. Under 'Work Allocation >> TGT', there is a section for 'TGT05 - WORK QUEUE'. A table lists contact details with columns: SELECT, ELEMENT, CONTACT, CRN, SSC, REQUESTED DATE, RESPONSE DATE, LOGGED DATE, and ALLOCATED TO. One contact is listed: Site Visit, ISO, 20004433, TCG, 29/08/2012 14:37:52, 29/08/2012 14:33:13, and TGT05. Below the table is a 'Transfer To Queue' button and an 'Exit' button. The footer contains copyright information for Xoserve Limited 2011.

SELECT	ELEMENT	CONTACT	CRN	SSC	REQUESTED DATE	RESPONSE DATE	LOGGED DATE	ALLOCATED TO
<input checked="" type="checkbox"/>	Site Visit	ISO	20004433	TCG	29/08/2012 14:37:52		29/08/2012 14:33:13	TGT05

This Contact will then appear in the Actions Queue ready for a team member to work on.



When transferring a Contact, you can select one or multiple Contacts at a time.

## 5. Correspondence

### 5.1 Receiving a Data Clarification Request

#### Original Contact and Third Party Data Clarification Request

This will appear in the Contact Queue under the support section on the Contact Management home page.

Select the Action Queue and the following will appear...



You can refine your search by using combinations of search criteria.

The screenshot shows the Xoserve 'Actions Queue' interface. At the top, there are navigation tabs for 'My Tasks', 'Contacts Queue', and 'Actions Queue'. Below these are search filters for 'Contact code', 'LDZ', and 'Type', all set to 'All'. A 'Refine' button is located to the right of these filters. The main section is titled 'Actions Queue' and contains a table with the following data:

SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	<a href="#">20000865-SV2</a>	WM	10/05/2012 15:21:29	20/09/2012 17:46:47	Not Allocated
<input type="checkbox"/>	Site Visit	ISO	<a href="#">20004857-SV2</a>	EA	10/09/2012 11:17:23	24/09/2012 11:48:22	Not Allocated
<input type="checkbox"/>	Data Clarification	ADD	<a href="#">20004972-DC1</a>		11/09/2012 14:25:02	13/09/2012 14:27:17	Not Allocated

Below the table, there is an 'Assign To Me' button on the left and an 'Exit' button on the right. The footer contains copyright information for Xoserve Limited 2011.

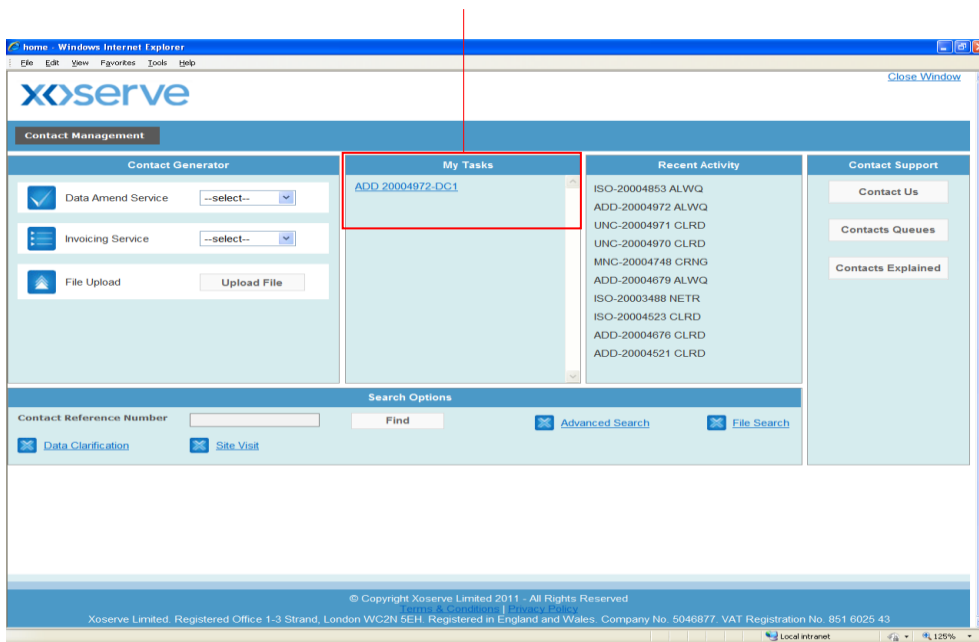
Step 1 – Select the box for the relevant Contact

Step 2 – Click Assign to me

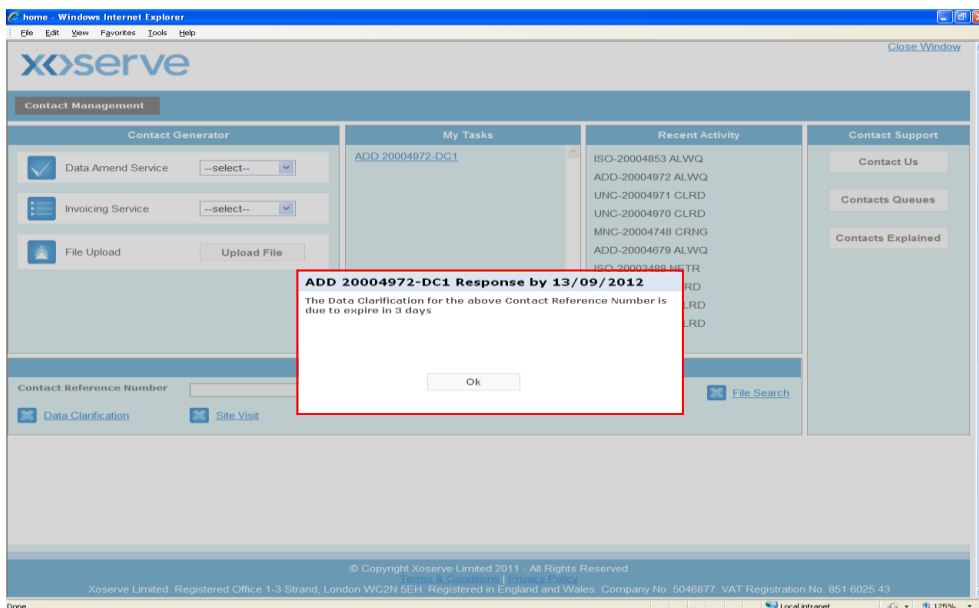


This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Assign To Me' button. A mouse cursor is positioned over the button, indicating the next step in the process.

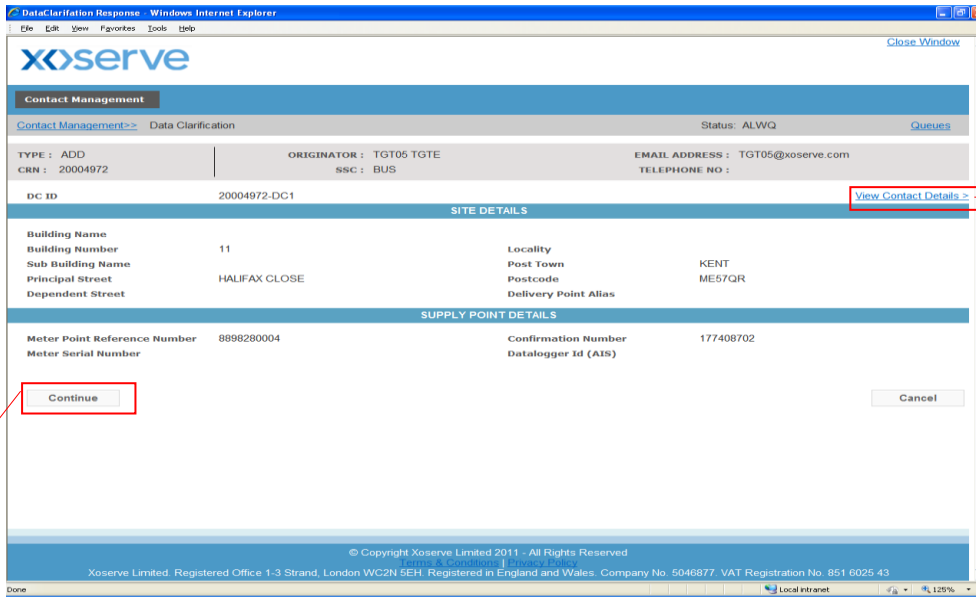
The Contact will become visible in your My Tasks.



When the DC is selected, the message below will appear stating the DC number and when a response is due by.

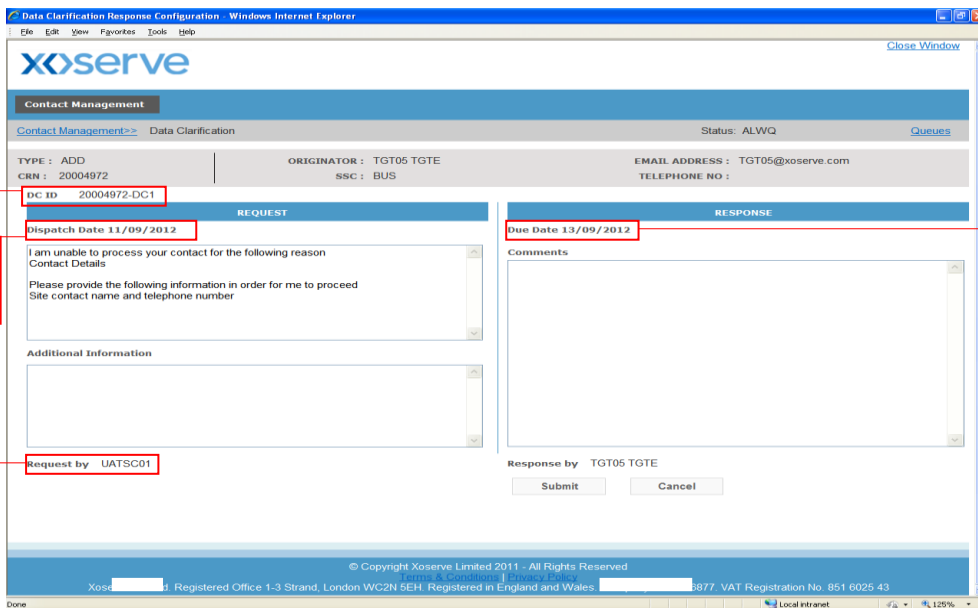


Click OK and you will be taken into the Data Clarification form.



You can see the original Contact by clicking on this hyperlink.

Click Continue and the details of the DC request will appear...



DC ID is an identifier for the original Contact.

Dispatch Date is the day Xoserve sent it to you.

'Request by' will identify the Xoserve Contact Handler.

This is when the DC needs to be responded by.



Up to two DC's can be sent per Contact. These will show as DC1 and DC2 on the system.

## 5.2 Responding to a Data Clarification Request



In the response section please provide us with the information we require in the free format comments field and select submit to return to us.

You can write up to 2000 characters in the Comments box.

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The DC will be directed back to the Contact Handler at Xoserve.



Your name is populated in the 'Response by' field when you click submit.



A Data Clarification Request effectively places your original Contact on hold; 'the clock has stopped'. Only when it is returned does the 'clock start' again.

## 5.3 Auto closure of a Data Clarification Request

A Data Clarification will remain open for 20 business days. Each time the Contact is opened you are prompted as to how many days are left on the DC before it is due to expire.

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If you do not respond during the 20 days, the Contact will auto close on the system. For the Contact to be resolved a new Contact will need to be raised including the information requested in the DC.



The maximum elapsed time for a Data Clarification stage is 20 business days. In this respect if a second Data Clarification is sent at any point within this time then it will remain valid for the remaining portion of the 20 days.

- E.g. DC1 responded after 15 days since it was sent  
DC2 sent on day 16 therefore 4 business days will remain

## 5.4 Receiving a Site Visit Request

A Site Visit Request will appear in the Contact Queue under the support section on the Contact Management home page. Select the Action Queue and the following will appear...



You can refine your search by using combinations of search criteria.

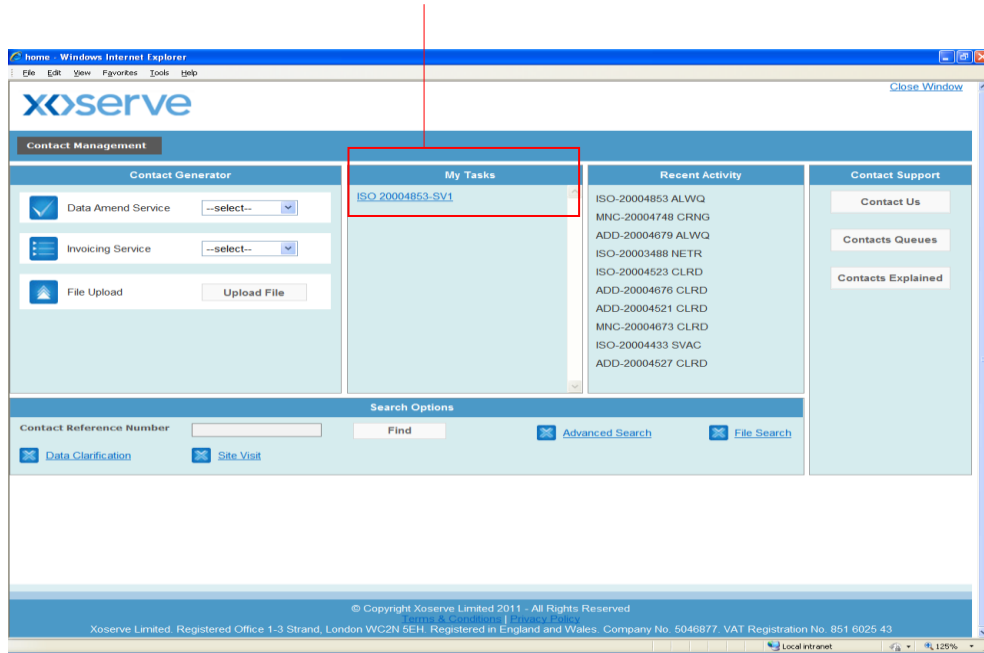
The screenshot shows the Xoserve Contact Management interface. The 'Actions Queue' section contains the following table:

SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	20000865-SV2	WM	10/05/2012 15:21:29	20/09/2012 17:46:47	Not Allocated
<input type="checkbox"/>	Site Visit	ISO	20004853-SV1	EA	10/09/2012 10:46:05	17/09/2012 10:51:59	Not Allocated
<input type="checkbox"/>	Site Visit	ISO	20004857-SV2	EA	10/09/2012 11:17:23	24/09/2012 11:48:22	Not Allocated

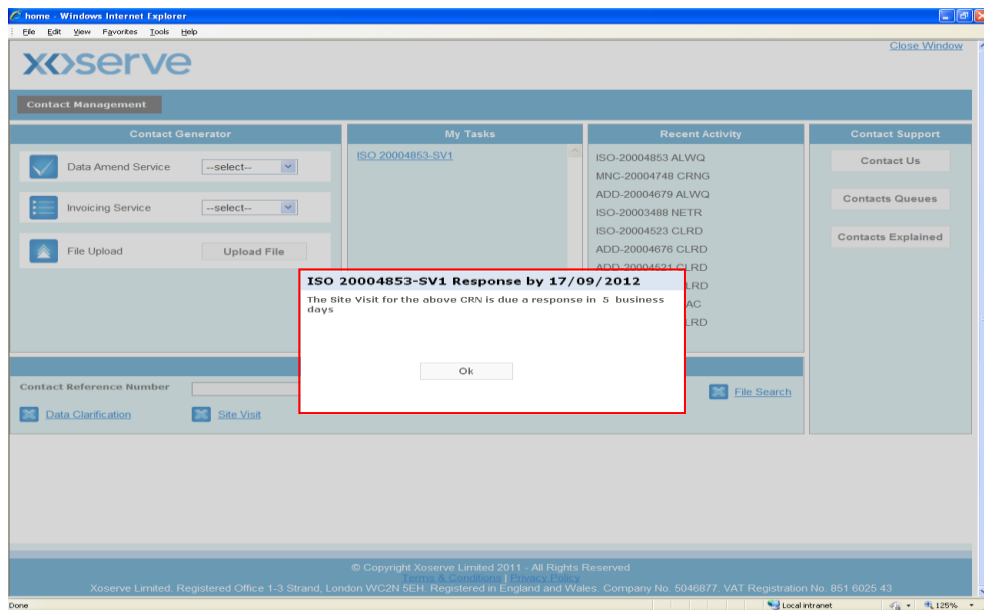
- Step 1 – Select the box for the relevant Contact  
Step 2 – Click Assign to me

The screenshot shows the Xoserve Contact Management interface, similar to the previous one, but with a mouse cursor pointing to the 'Assign To Me' button. The 'Actions Queue' table is the same as in the previous screenshot.

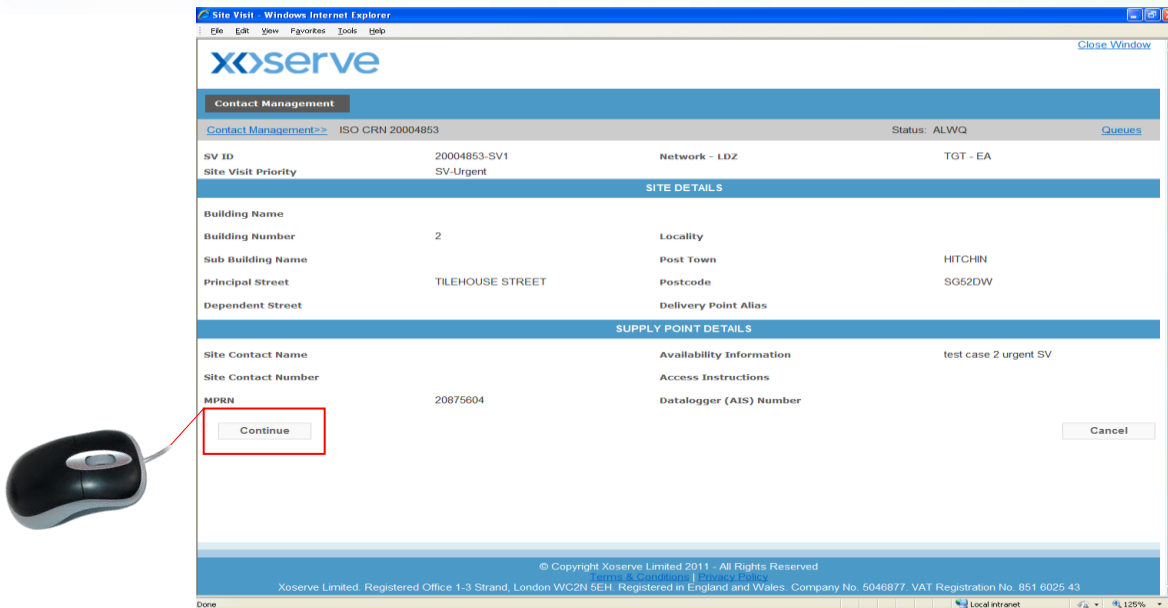
The Contact will become visible in your My Tasks



When the SV is selected the message below will appear stating the SV number.

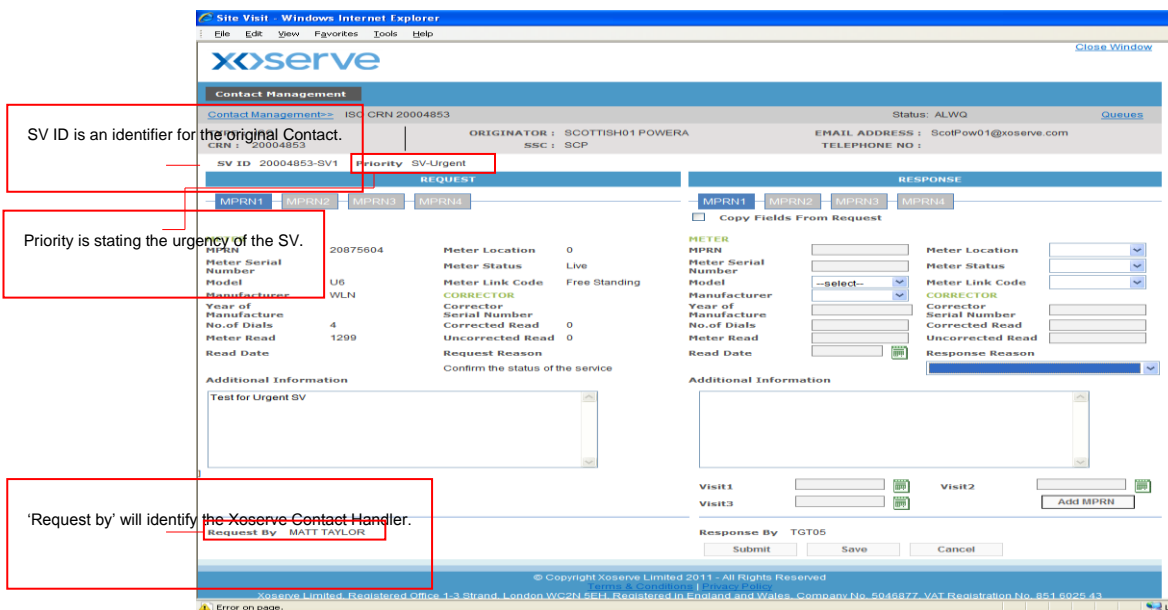


Click OK and you will be taken into the Site Visit Request form.



Click Continue and the details of the SV request will appear.

The request from Xoserve will appear on the left side of the screen and the response area for yourselves will be on the right side of the screen.



There is no limit to the number of SV's that can be sent per Contact.

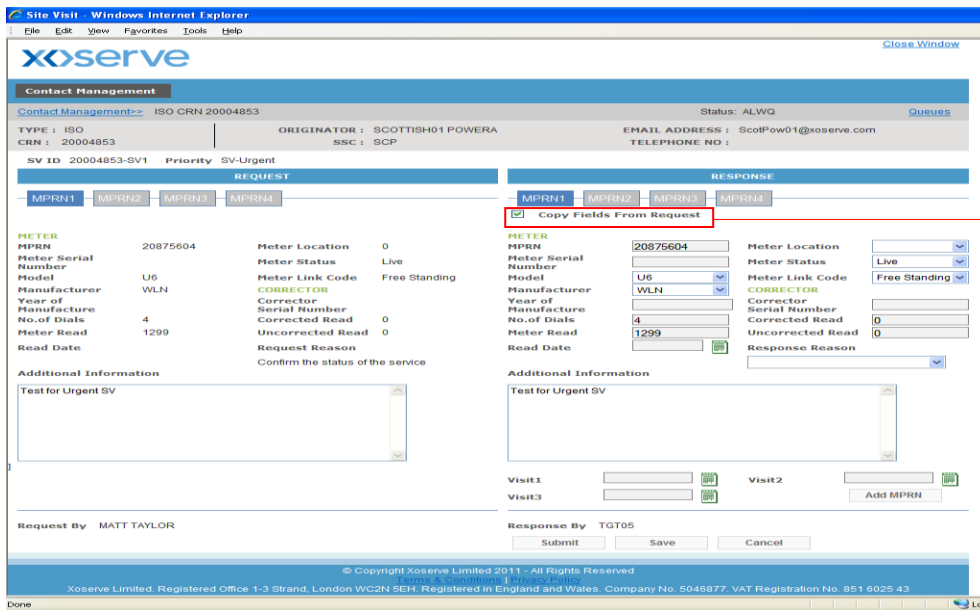


Please note more than one MPRN can be included in the request section from Xoserve. The MPRNs can be seen by selecting MPRN 2 Tab etc.



## 5.5 Responding to a Site Visit Request

The information identified following a Site Visit can be entered into the response screen manually or select the box Copy Fields From Request; this will pull the information entered into the Request section to the Response section.

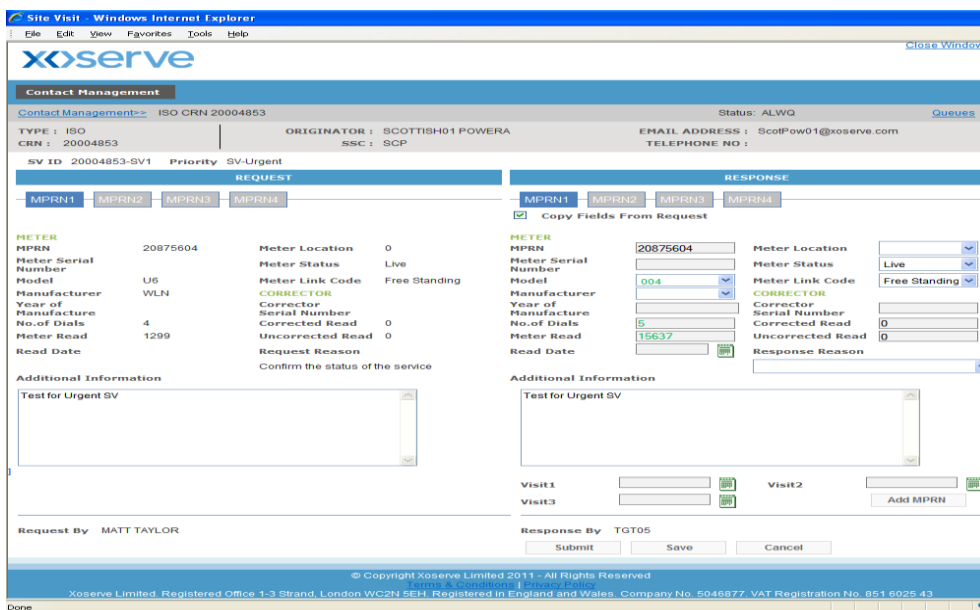


The screenshot shows the Xoserve 'Site Visit' response interface. The 'REQUEST' section on the left contains the following data:

METER	20875604	Meter Location	0
MPRN	20875604	Meter Status	Live
Meter Serial Number		Meter Link Code	Free Standing
Model	U6	CORRECTOR	
Manufacturer	WLN	Year of Manufacture	
Year of Manufacture		Corrector Serial Number	
No. of Dials	4	Corrected Read	0
Meter Read	1299	Uncorrected Read	0
Read Date		Request Reason	

The 'RESPONSE' section on the right has the 'Copy Fields From Request' checkbox checked. The data in the response section is identical to the request section. A mouse cursor is pointing at the checkbox.

If the information found following the Site Visit is different to the information provided, this can be changed manually and will show in green.



The screenshot shows the Xoserve 'Site Visit' response interface with manual changes highlighted in green. The 'REQUEST' section data is the same as in the previous screenshot. The 'RESPONSE' section data is as follows:

METER	20875604	Meter Location	0
MPRN	20875604	Meter Status	Live
Meter Serial Number		Meter Link Code	Free Standing
Model	004	CORRECTOR	
Manufacturer	WLN	Year of Manufacture	
Year of Manufacture		Corrector Serial Number	
No. of Dials	5	Corrected Read	0
Meter Read	15637	Uncorrected Read	0
Read Date		Request Reason	

The 'Copy Fields From Request' checkbox is still checked. The 'Model' field is '004', 'No. of Dials' is '5', and 'Meter Read' is '15637', all in green text.



Please note more than one MPRN can be included in the response section depending on the information found at site.

You can write up to 2000 characters in the Additional Details box.

The Site Visit template includes 3 Visit boxes, this allows you to enter the date the site visit was completed.

The screenshot shows the Xoserve Contact Management interface. The 'Response' section is active, displaying fields for METER, MPRN, Meter Serial Number, Meter Link Code, Meter Status, Meter Location, Meter Link Code, CORRECTOR, Year of Manufacture, Corrector Serial Number, No. of Dials, Meter Read, and Read Date. The 'Response By' field is populated with 'TGT05' and is highlighted with a red box. The 'Submit' button is also highlighted with a red box. A mouse cursor is pointing at the 'Submit' button.



More than one MPRN can be included in the Response section. This information can be entered by selecting Add MPRN or MPRN 2 tab.



Your name is populated in the 'Response by' field.

Once the relevant information is updated, click Submit. The SV will be directed back to the Contact Handler at Xoserve.

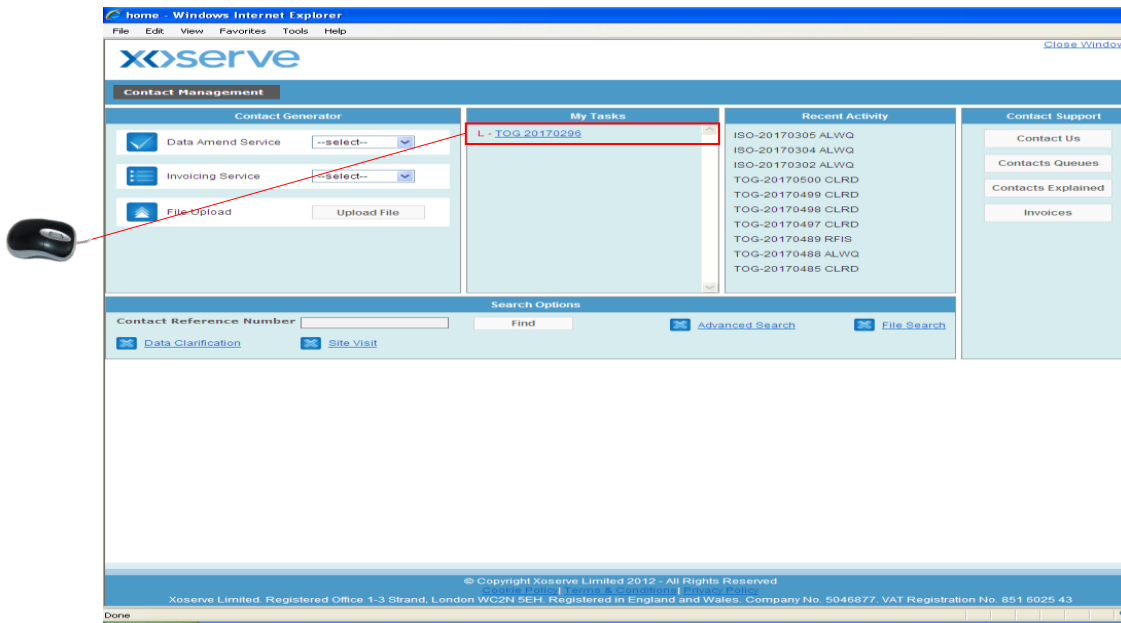
## 5.6 Receiving an RFI Request (Theft of Gas Only)

In response to your original Contact or a Contact raised by another Shipper or Network, where more information is required regarding a Theft, a Request for Information (RFI) will be sent. These will appear in the Contact queue under the support section on the Contact Management home page. Tick the box next to the relevant **ToG** contact, then click 'Assign To Me'

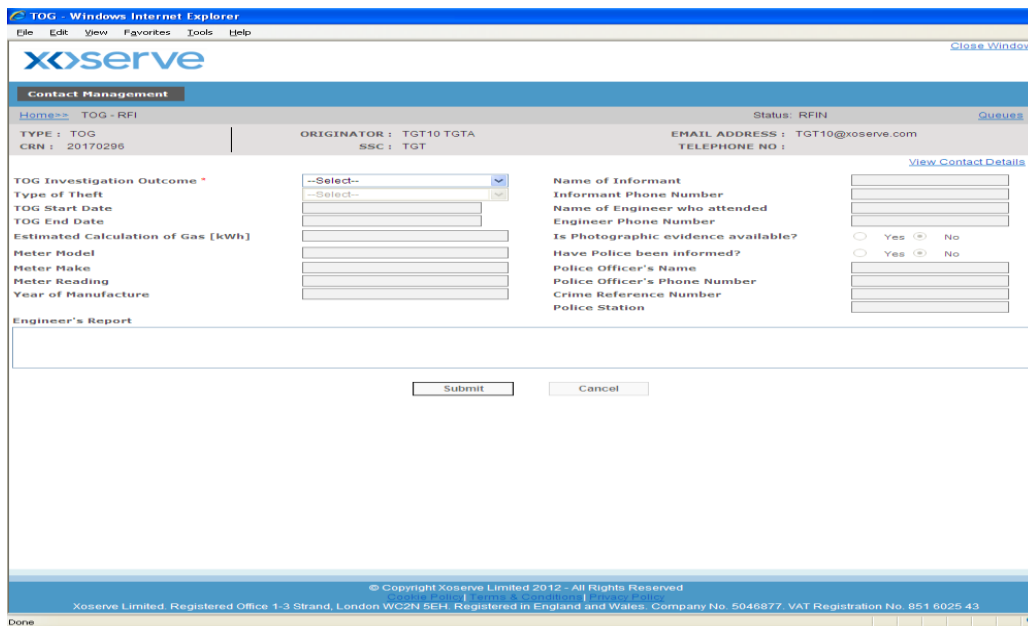
The screenshot shows the Xoserve Actions Queue interface. The 'Actions Queue' tab is selected. A table displays a list of contacts with columns for SELECT, TYPE, CONTACT, CRN ID, LDZ, REQUEST DATE, RESPONSE DATE, and ALLOCATED TO. The first row is highlighted, and the 'SELECT' checkbox and 'Assign To Me' button are highlighted with red boxes. A mouse cursor is pointing at the 'Assign To Me' button.

SELECT	TYPE	CONTACT	CRN ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input checked="" type="checkbox"/>	RFI	TOG	20120296		11/02/2013 15:44:58		Not Allocated

The contact will appear in your 'My Tasks' area. Click on the CRN hyperlink.



The following screen appears, detailing the RFI that requires your attention. To view the contact itself, you can click 'View Contact Details'.



Once 'View Contact Details' has been clicked you will see the Contact as below:

The screenshot shows a web browser window titled 'Contact Details - Windows Internet Explorer'. The page header includes the Xoserve logo and 'Contact Management'. Below the header, there are navigation links: 'Home >>', 'TOG - RFI', and 'Status: RFIN'. A 'Queue' link is also visible. The form is divided into several sections:

- Form Fields:** TYPE, CRN, ORIGINATOR, SSC, EMAIL ADDRESS, TELEPHONE NO.
- Contact Information:** Meter Point Reference Number, Meter Serial Number, Building Number/Name (DFDSFSD), Delivery Point Alias, Sub Building Name, Principal Street Name (FDFSDF), Dependent Street, Dependent Locality, Post Town (FSDDSF), Postcode (B90 2WW).
- Required Emergency Job?** Radio buttons for Yes and No.
- Job Number:** adsdasds
- Type of Theft (Allegation):** Tampered Meter Index (dropdown menu)
- TOG Allegation Description:** A large text area for entering details.

At the bottom of the form is an 'Ok' button. The footer contains copyright information: '© Copyright Xoserve Limited 2012 - All Rights Reserved' and 'Xoserve Limited, Registered Office 1-3 Strand, London WC2N 5EH, Registered in England and Wales, Company No. 5046877, VAT Registration No. 851 6025 43'. The browser status bar shows 'Local intranet' and '110%' zoom.

## 5.6 Receiving an RFI Request (Theft of Gas Only)

In response to the Request for Information a TOG Investigation Outcome will need to be provided. Dependent on the outcome of the investigation the system will require mandatory information before user can Submit the Contact.

### Valid TOG

Where a Theft has been investigated and proven against a Large or Small Supply Point. User will need to record the following:

Type of Theft

Theft Start Date

Theft End Date

Estimated Calculation of Gas [kWh]

If Police have been informed and if they have, Police data provided

Engineers report

### Valid TOG-Not Pursuing

Where a Theft has been investigated and proven against a Large or Small Supply Point but is not pursued.

### Invalid TOG

Where a Theft has been investigated and determined as Invalid TOG Contact raised.

Once all necessary information has been provided, click 'Submit' to send the RFI back to Xoserve.

TOG - Windows Internet Explorer

File Edit View Favorites Tools Help

**xoserve** [Close Window](#)

**Contact Management**

Home>> TOG - RFI Status: RFIN [Queue](#)

TYPE : TOG ORIGINATOR : TGT10 TGTA EMAIL ADDRESS : TGT10@xoserve.com  
 CRN : 20170296 SSC : TGT TELEPHONE NO :

TOG Investigation Outcome \* --Select--  
 Type of Theft --Select--  
 TOG Start Date Invalid TOG  
 TOG End Date Valid TOG-Not Pursuing  
 Estimated Calculation of Gas [kWh] Valid TOG  
 Meter Model  
 Meter Make  
 Meter Reading  
 Year of Manufacture

Name of Informant  
 Informant Phone Number  
 Name of Engineer who attended  
 Engineer Phone Number  
 Is Photographic evidence available?  Yes  No  
 Have Police been Informed?  Yes  No  
 Police Officer's Name  
 Police Officer's Phone Number  
 Crime Reference Number  
 Police Station

[View Contact Details](#)

Engineer's Report

Submit Cancel

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A Request for Information will remain open for 80 business days. If you do not respond within the 80 day period, the Contact will auto close on the system.

For the contact to be resolved a new contact will need to be raised including the information to complete the RFI.

SearchViewForm - Windows Internet Explorer

File Edit View Favorites Tools Help

**xoserve** [Close Window](#)

**Contact Management**

Home>> TOG CRN 20168939 Status: CLRD [Queue](#)

TYPE : TOG ORIGINATOR : EAMONN DARCY EMAIL ADDRESS : Eamonn.Darcy@Nationalgrid.com  
 CRN : 20168939 SSC : BUS TELEPHONE NO :

Contact Information TOG Investigation

Meter Point Reference Number 8897388300  
 Meter Serial Number  
 Building Number/Name THE FARM  
 Delivery Point Alias  
 Sub Building Name  
 Principal Street Name BUSHCOMBE LANE  
 Dependent Street  
 Dependent Locality  
 Post Town CHELTENHAM  
 Postcode GL52 3PH

Required Emergency Job?  Yes  No  
 Job Number  
 Type of Theft (Allegation) Tampered Meter Index  
 TOG Allegation Description

Resolution Comments  
 With reference to your contact, unfortunately I am unable to process your request for the reason outlined below  
 The Contact has been closed as the expiry date has elapsed.

Ok Challenge Resolution

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## 6. Resolution of a Contact

### 6.1 Contact Resolution

There are two outcomes to a Contact once it has been worked upon by Xoserve; Valid and Invalid.

Valid Resolution is when your Contact has been actioned as requested by Xoserve and Invalid Resolution is when Xoserve have not been able to complete the Contact due to validation failures or missing information.

Valid resolution of a Contact looks as follows including a standard top and tail message and the confirmation as to how your Contact has been processed....

The screenshot shows the Xoserve Contact Management interface for a contact with CRN 20003472. The status is CLRD. The contact details include: TYPE: MNC, ORIGINATOR: TGT01 TGTA, EMAIL ADDRESS: TGT01@xoserve.com, CRN: 20003472, SSC: BUS, TELEPHONE NO: (blank). The meter point is 20600 and the type of service is Single. The address is 1 PLOT 1, PRINSTED LANE, JUBILEE MEWS, EMSWORTH, PO108EA. The resolution comments section contains the following text: "With reference to your contact, I am pleased to inform you that your request has been actioned", "Contact Resolved", "With reference to your contact, I am pleased to inform you that your request has been actioned", and "Thank you for raising this contact and I hope it is resolved to your satisfaction". A red box highlights the second line of the resolution comments, and a red line points to a callout box on the right.

This part of the resolution message tells you the outcome.

Invalid resolution of a Contact looks as follows including a standard opening paragraph and the reason why the Contact was not upheld....

The screenshot shows the Xoserve Contact Management interface for a contact with CRN 20004457. The status is CLRD. The contact details include: TYPE: UNC, ORIGINATOR: TGT03 TGTC, EMAIL ADDRESS: TGT03@xoserve.com, CRN: 20004457, SSC: TGT, TELEPHONE NO: (blank). The meter point reference number is 9137357109 and the type of service is Domestic. The current address is 64 THE DRIVE, POWICK, WR24SA. The proposed address is 64A THE DRIVE, POWICK, WR24SA. The resolution comments section contains the following text: "With reference to your contact, unfortunately I am unable to process your request for the reason outlined below", "The site requested has had a Shipper history", and "Challenge Resolution". A red box highlights the second line of the resolution comments, and a red line points to a callout box on the right.

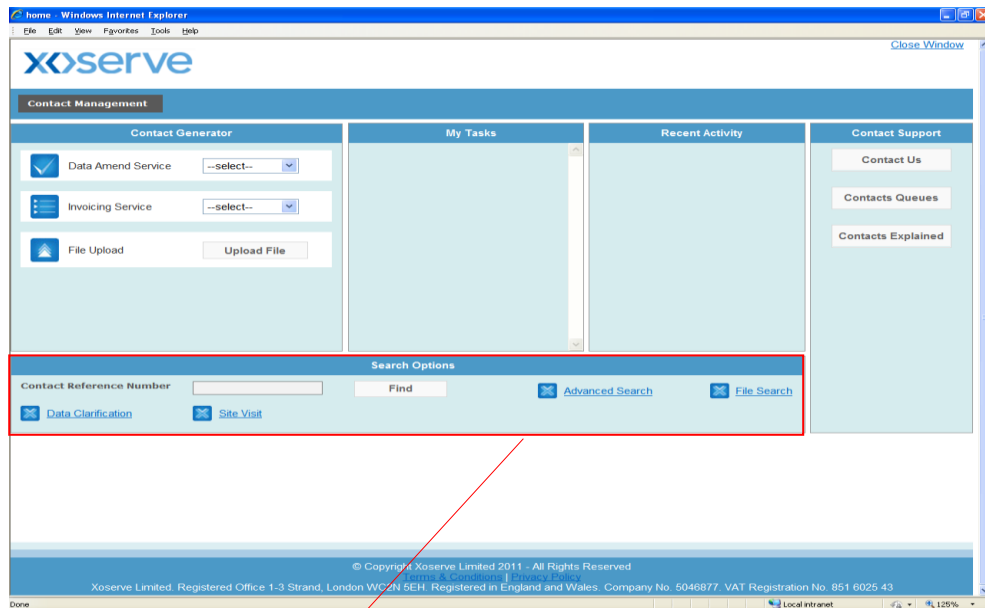
This part tells you why your Contact was not upheld.

## 7. Search Facilities

### 7.1 Search Options

In order to find a Contact on the system there are a number of searches available.

Search options are located on the Contact Management home page.



There are 5 search options, these are:-

Basic Search – Pinpointing a Contact by Contact Reference Number

Advanced Search – Searching for a single or multiple Contacts using a combination of search filters

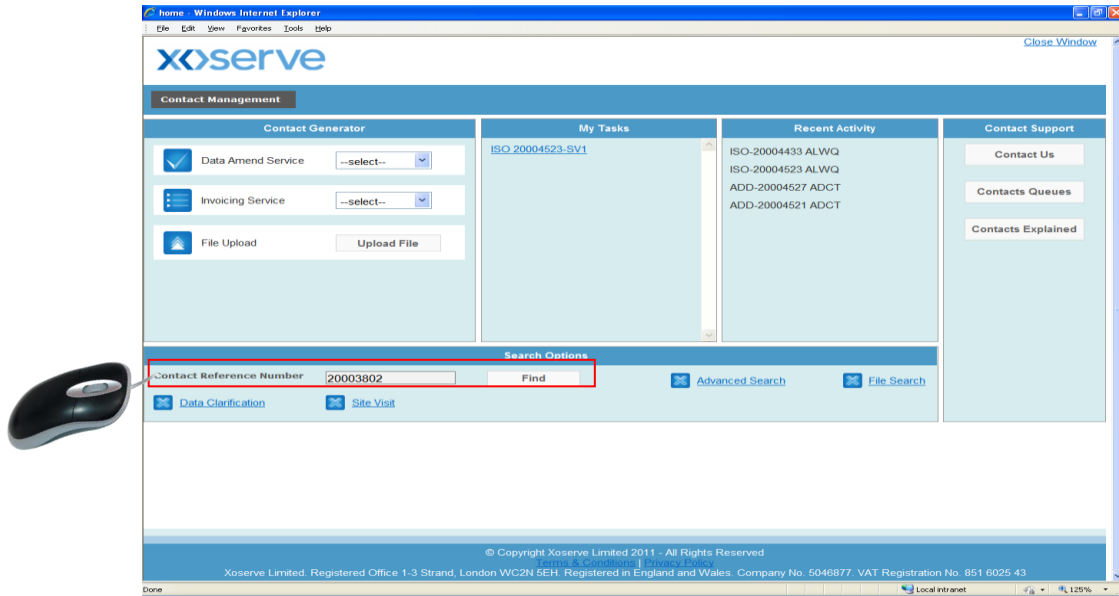
File Search – Locating a file submitted to Xoserve

Data Clarification Search – Searching for a Contact currently at DC status or has passed through the DC status.

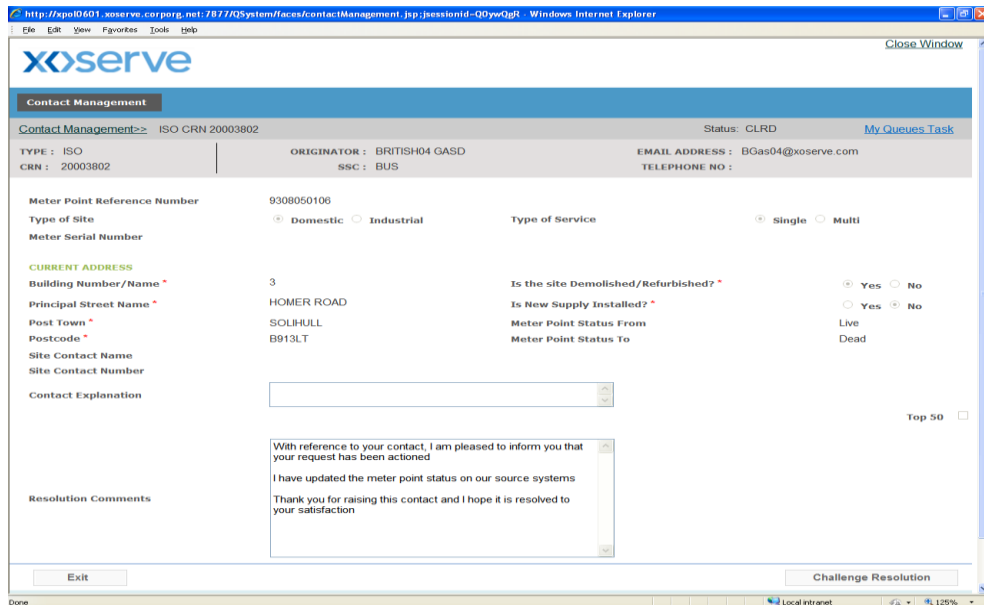
Site Visit Search – Searching for a Contact currently at SV status or has passed through the SV status.

## 7.2 Basic Search

To retrieve information on a specific Contact, enter your CRN number into the field and click find.



The following results will appear presenting the details of the Contact....

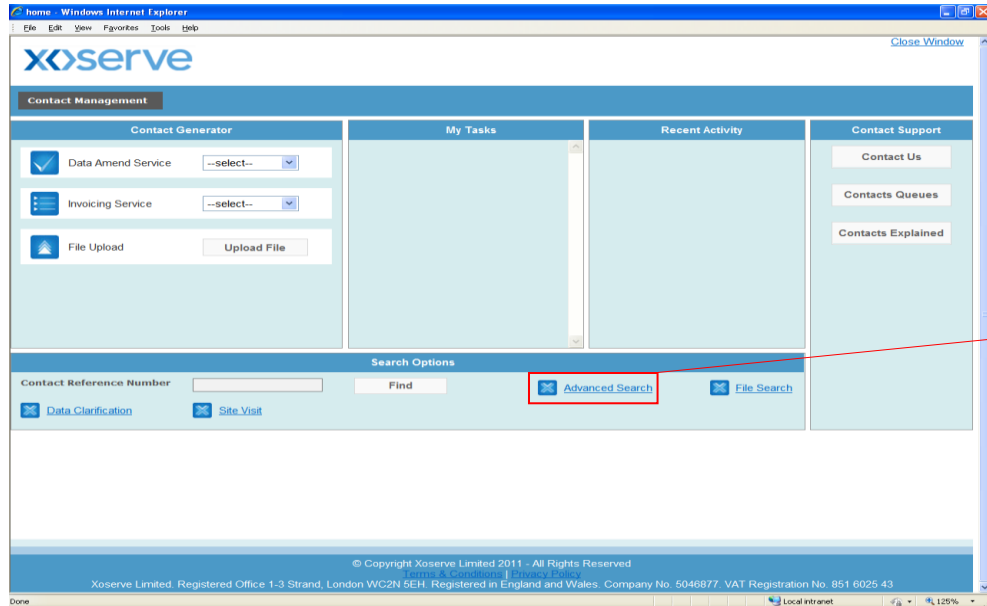


You cannot edit this Contact; it is read only.

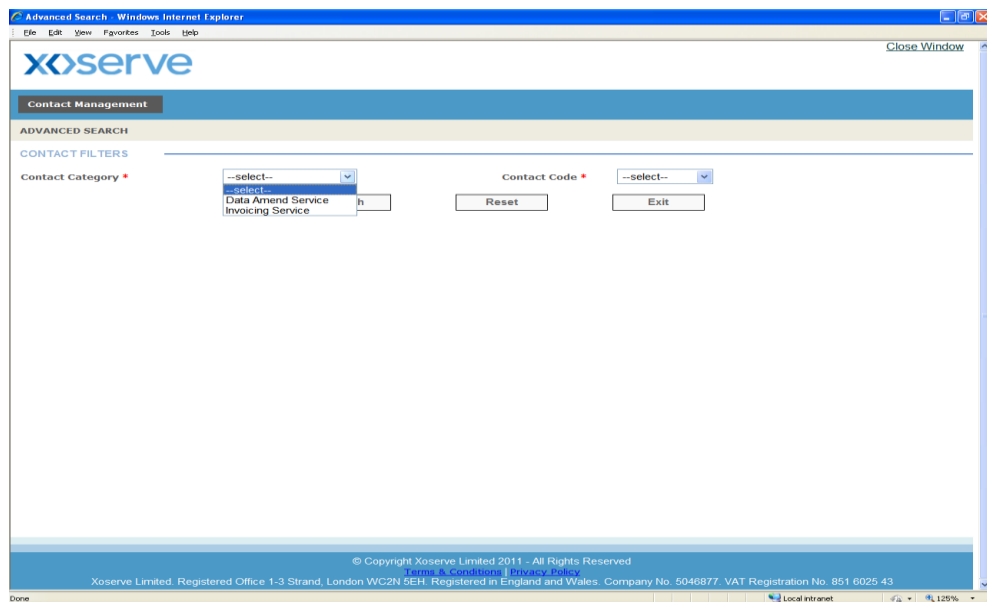


## 7.3 Advanced Search

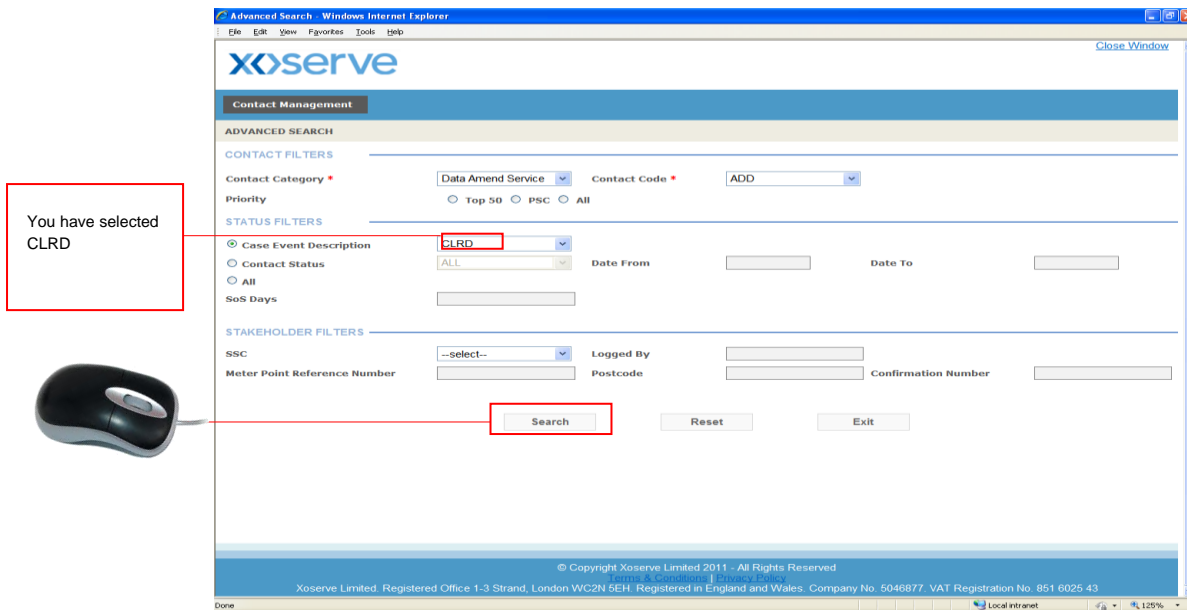
To retrieve information on Contacts, click Advanced Search.



You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.

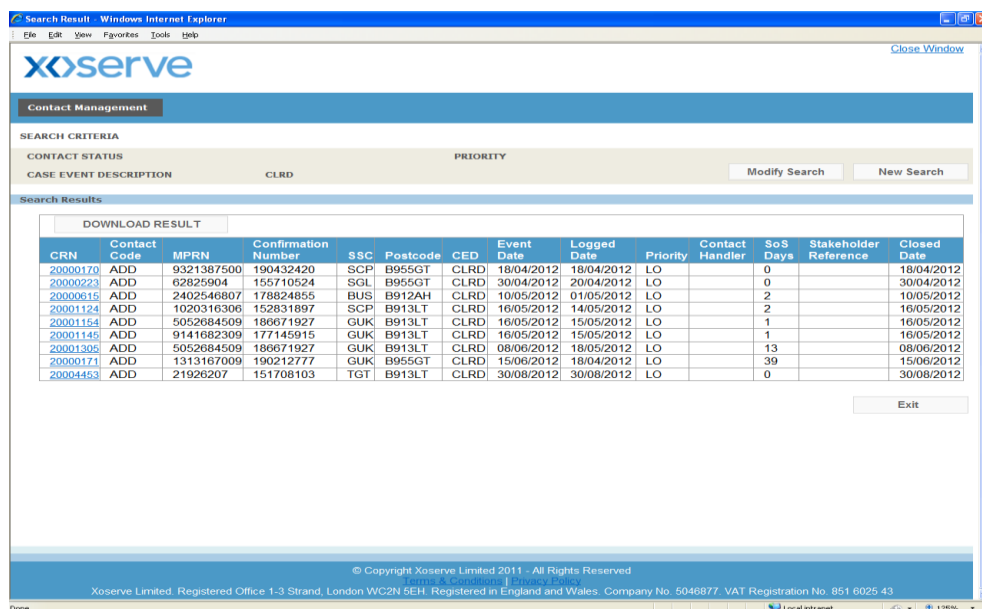


The following screen will appear and you can filter the search further by choosing data from either Status Filters and Stakeholder Filters....



Enter the necessary data, in the above example you have selected CLRD and click Search. The following results will appear presenting the CRN's relating to the search.

 Did you notice that three radio buttons appeared in the Contact Filter section?



Select the relevant CRN you require and the Contact will appear showing the Contact details and the resolution for the Contact.

## Modify Search

On the results returned through Advanced search there is an option to Modify Search or conduct a New Search.

Search Result - Windows Internet Explorer

Close Window

**xoserve**

Contact Management

SEARCH CRITERIA

CONTACT STATUS: CLRD PRIORITY

CASE EVENT DESCRIPTION: CLRD

Modify Search New Search

Search Results

DOWNLOAD RESULT

CRN	Contact Code	MPRN	Confirmation Number	SSC	Postcode	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date
20000170	ADD	9321367500	190432420	SCP	B955GT	CLRD	18/04/2012	18/04/2012	LO		0		18/04/2012
20000223	ADD	62825904	155710524	SGI	B955GT	CLRD	30/04/2012	20/04/2012	LO		0		30/04/2012
20000615	ADD	2402546807	178824855	BUS	B912AH	CLRD	10/05/2012	01/05/2012	LO		2		10/05/2012
20001124	ADD	1020316306	152831897	SCP	B913LT	CLRD	16/05/2012	14/05/2012	LO		2		16/05/2012
20001154	ADD	5052684509	186671927	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO		1		16/05/2012
20001145	ADD	9141682309	177145915	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO		1		16/05/2012
20001305	ADD	5052684509	186671927	GUK	B913LT	CLRD	08/06/2012	18/05/2012	LO		13		08/06/2012
20000171	ADD	1313167009	190212777	GUK	B955GT	CLRD	15/06/2012	18/04/2012	LO		39		15/06/2012
20004453	ADD	21926207	151708103	TGT	B913LT	CLRD	30/08/2012	30/08/2012	LO		0		30/08/2012

Exit

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Modify Search will take you back to the initial search you have entered. From here the search criteria can be amended.

Advanced Search - Windows Internet Explorer

Close Window

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Contact Management

ADVANCED SEARCH

CONTACT FILTERS

Contact Category: Data Amend Service Contact Code: ADD

Priority:  Top 50  PSC  All

STATUS FILTERS

Case Event Description: CLRD

Contact Status: ALL Date From: Date To:

SoS Days:

STAKEHOLDER FILTERS

SSC: --select-- Logged By:

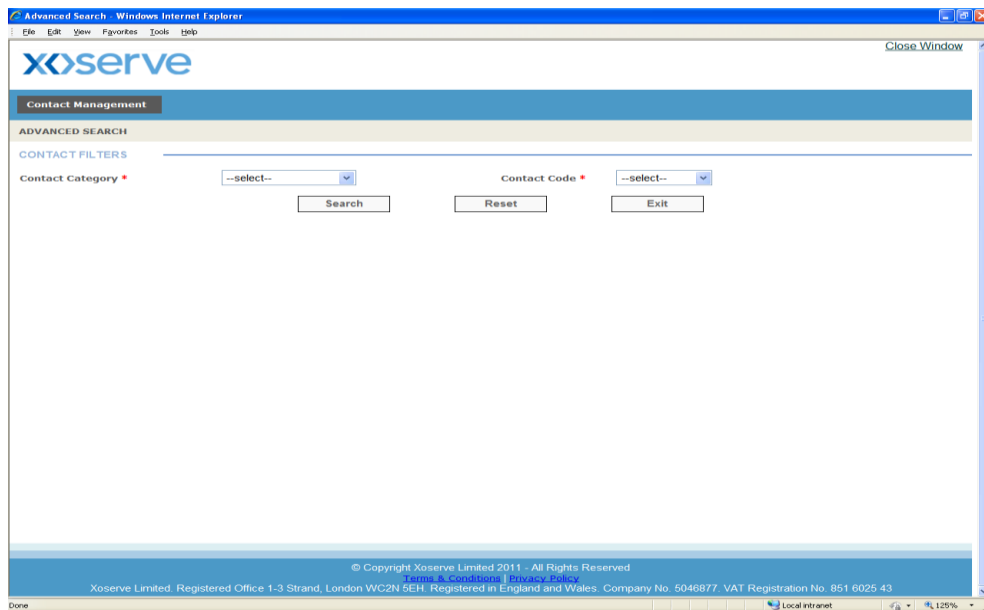
Meter Point Reference Number: Postcode: Confirmation Number:

Search Reset Exit

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## New Search

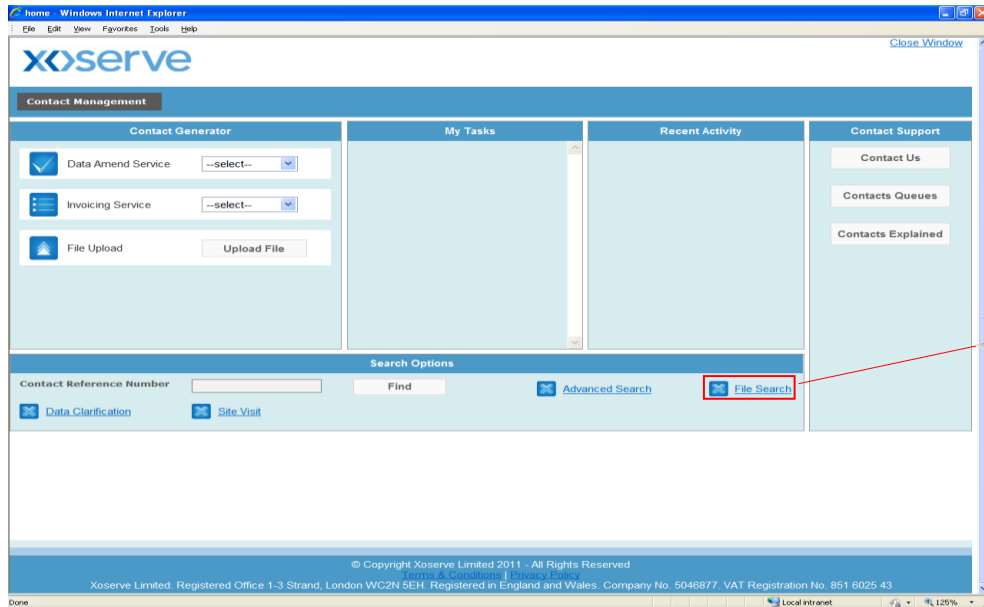
New Search takes you to the original search screen to complete a brand new search with new data.



You will need to repeat the selection step demonstrated on page 40. To pick a Contact Category and the Contact Code you require.

## 7.4 File Search

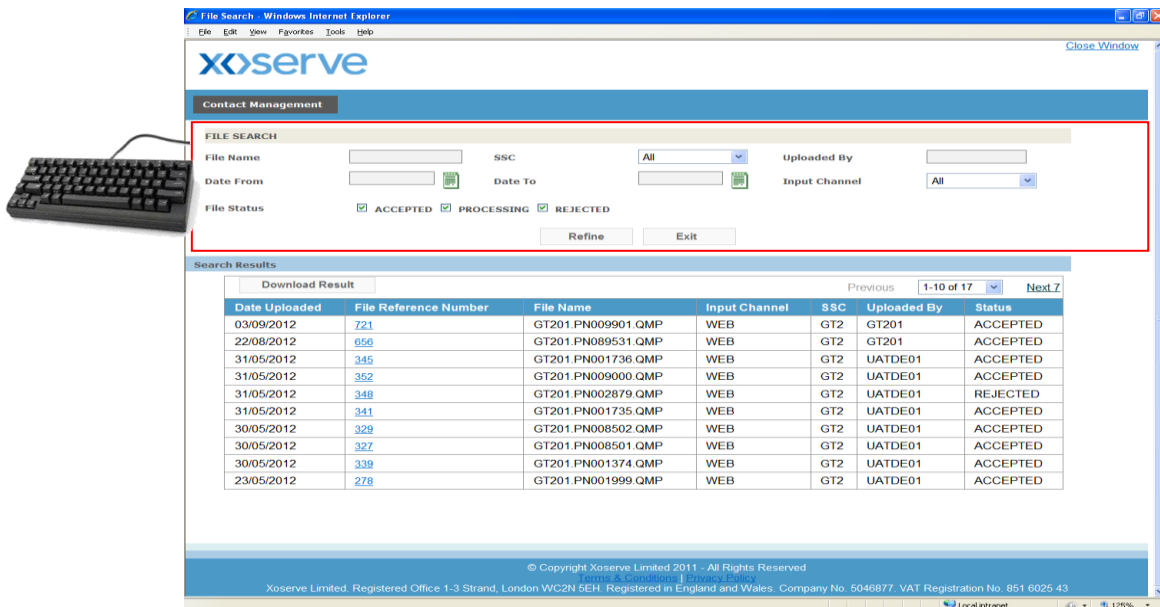
To retrieve information on files you have submitted to Xoserve, click on 'File Search'.



The following screen will appear allowing specific information to be entered for the search.



The screen will detail the information of the last 10 QMP files submitted to Xoserve.



The initial screen will have all File status selected, depending on your search, these can be de-selected as necessary.

**ACCEPTED:** Means that each record has been through validation checks, however some of these records may have failed those checks. You will be able to identify these if you open up the file.

**PROCESSING:** Denotes that the file format checks have passed validation and that the records within the file are undergoing formatting and completeness checks.

**REJECTED:** This is a very rare occurrence and due to unforeseen circumstances you will need to resend a file with a different file name.



You will only be able to see the status of the files that have been sent by your organisation.

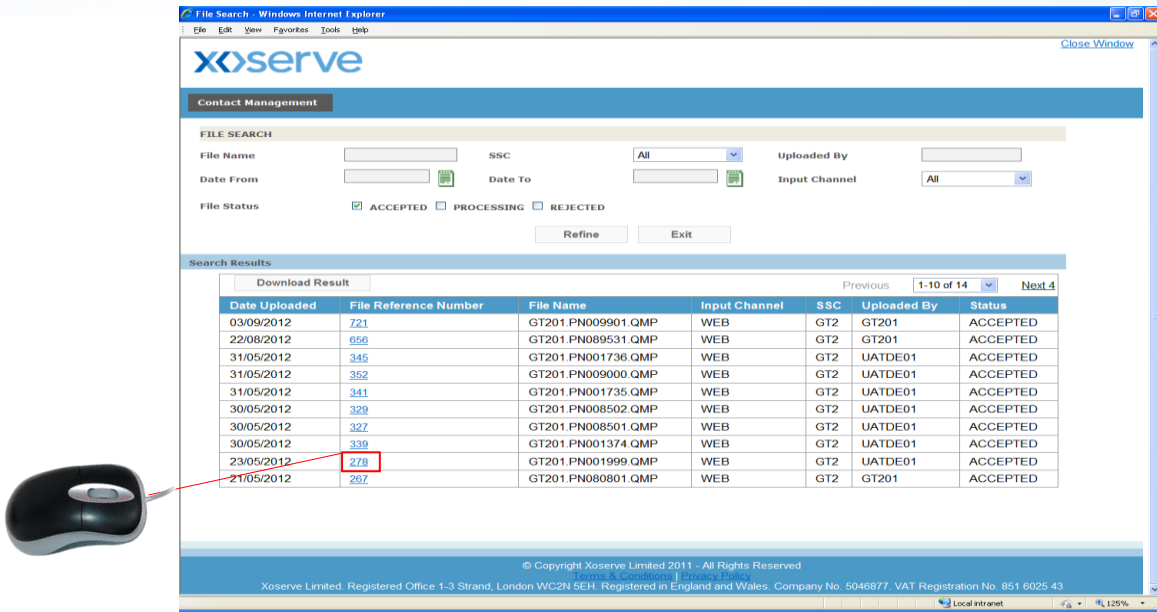
The screenshot shows the Xserve web application interface. The 'FILE SEARCH' section has the following filters: File Name, SSC (set to 'All'), Date From, Date To, Uploaded By, and Input Channel (set to 'All'). The 'File Status' section has checkboxes for 'ACCEPTED', 'PROCESSING', and 'REJECTED', all of which are checked. A red box highlights the 'ACCEPTED', 'PROCESSING', and 'REJECTED' checkboxes and the 'Refine' button. The 'Search Results' section shows a table with the following columns: Date Uploaded, File Reference Number, File Name, Input Channel, SSC, Uploaded By, and Status. The table contains 14 rows of data, all with a status of 'ACCEPTED'. A mouse cursor is visible over the 'Refine' button.

Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
03/09/2012	721	GT201.PN009901.QMP	WEB	GT2	GT201	ACCEPTED
22/08/2012	656	GT201.PN089531.QMP	WEB	GT2	GT201	ACCEPTED
31/05/2012	346	GT201.PN001736.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	352	GT201.PN009000.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	348	GT201.PN002879.QMP	WEB	GT2	UATDE01	REJECTED
31/05/2012	341	GT201.PN001735.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	329	GT201.PN008502.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	327	GT201.PN008501.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	339	GT201.PN001374.QMP	WEB	GT2	UATDE01	ACCEPTED
23/05/2012	278	GT201.PN001999.QMP	WEB	GT2	UATDE01	ACCEPTED

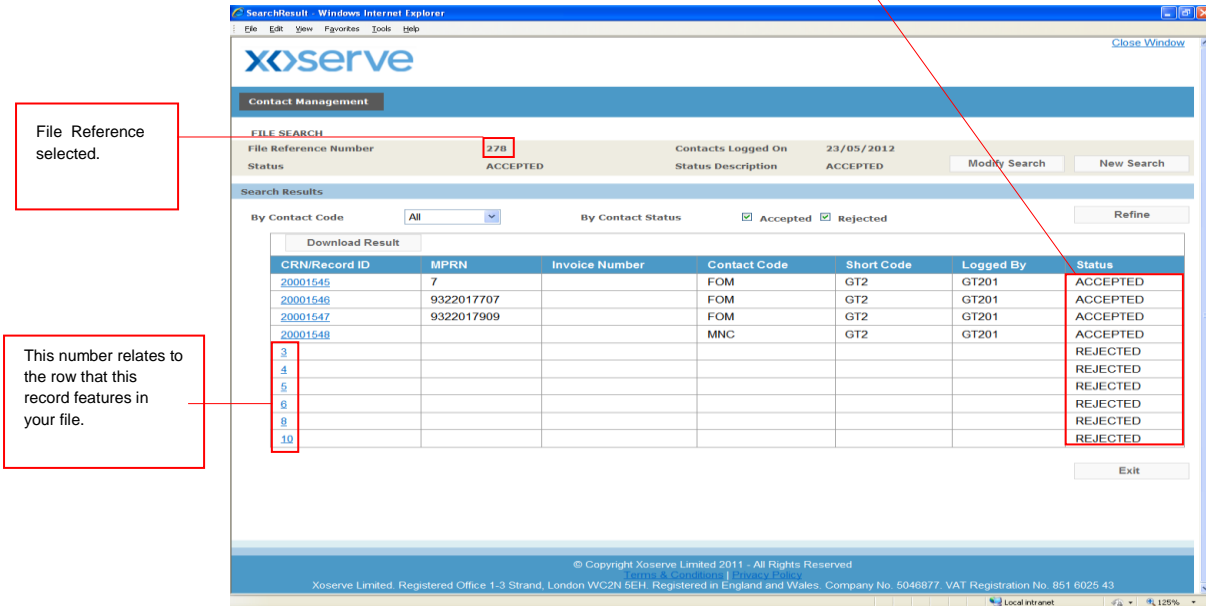
For the criteria selected above in the above screen the results show all files at 'Accepted' status. The next page illustrates what will appear.



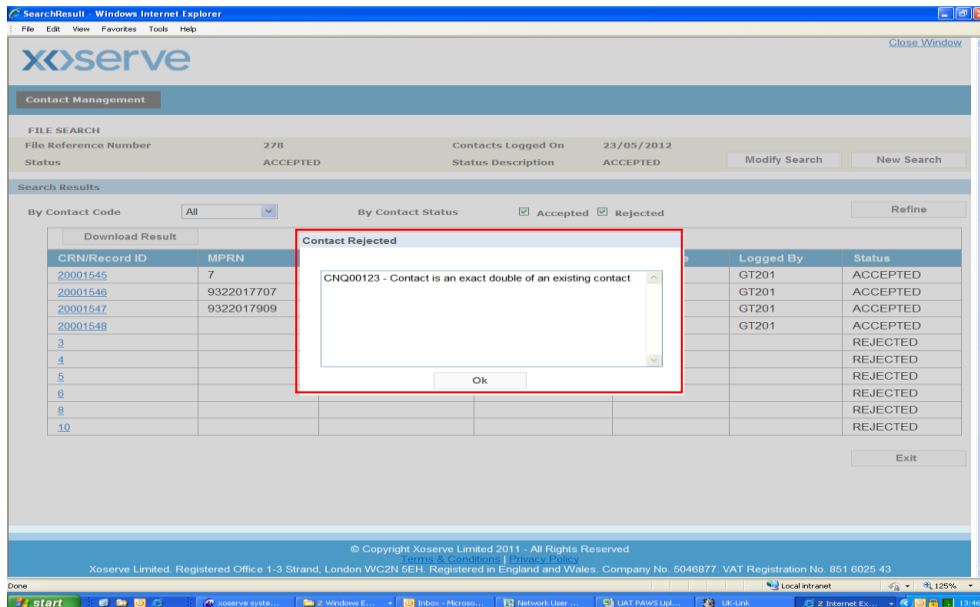
Any files that failed to Load when sent via Web Upload will not appear here. An appropriate failure message will have appeared at the time the file was attempted to be sent.



Click on the File Reference Number and the recorded results become available for each CRN in the file.



To determine why records have been rejected, select the CRN / Record ID column. A pop up message will display to show the reject code and reject reason.



Click Ok and the screen behind comes back into full view.

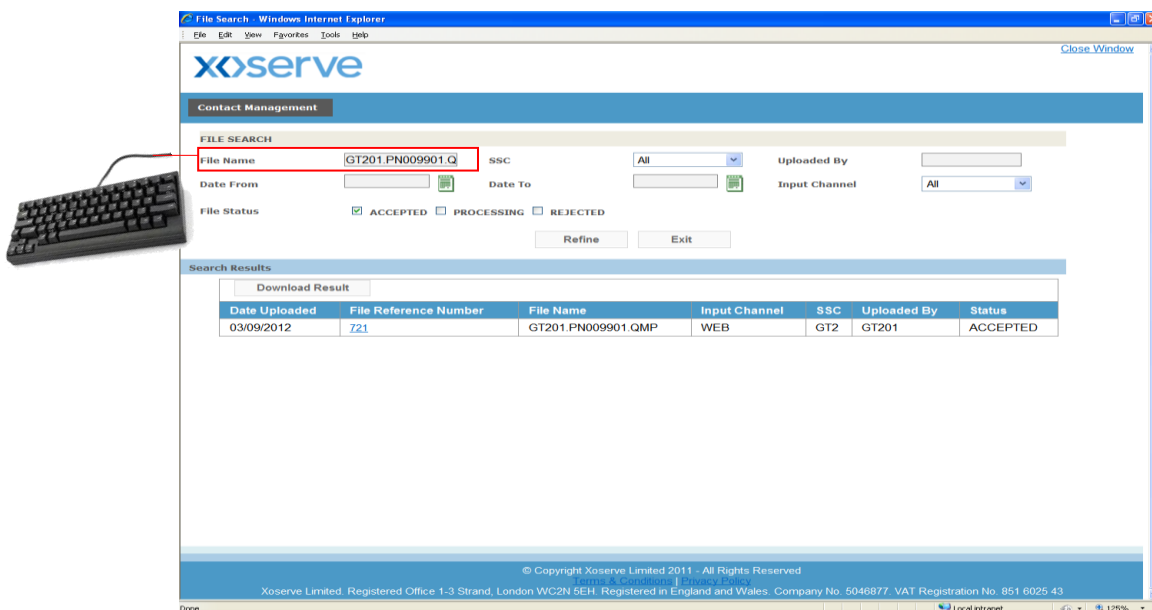
To complete a search using a specific file name...

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows.

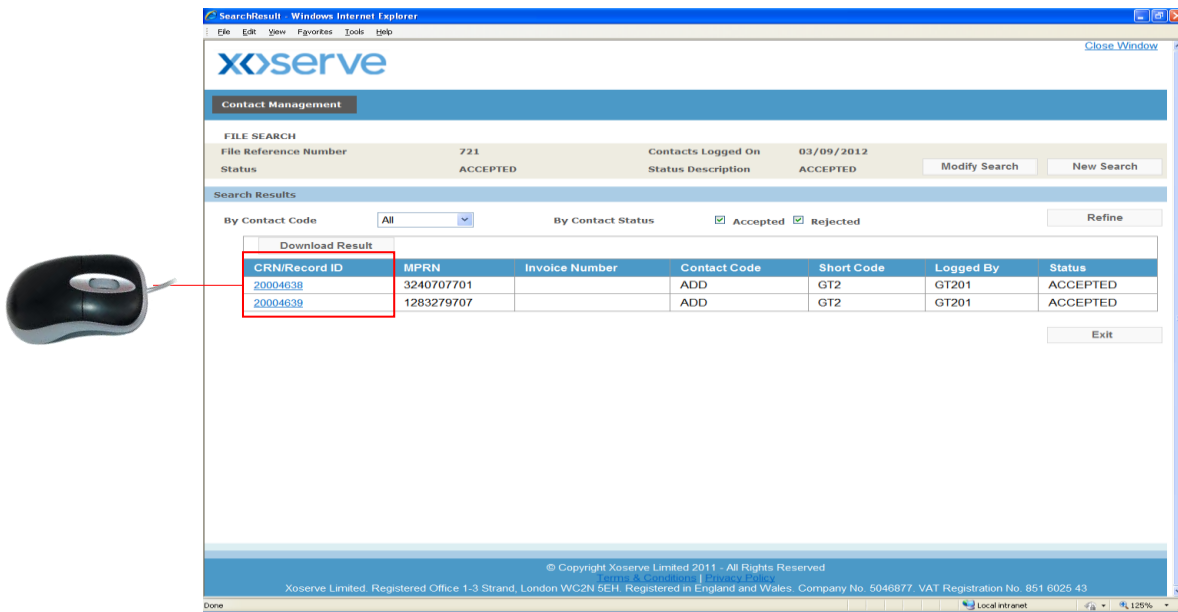


One of the File Status's must be selected in order for the search to bring back the appropriate results.



Select the File Reference Number and the records within the file will appear.

To drill down further, click on a specific Contact.



SearchResults - Windows Internet Explorer

**xoserve**

Contact Management

FILE SEARCH  
File Reference Number: 721  
Status: ACCEPTED  
Contacts Logged On: 03/09/2012  
Status Description: ACCEPTED  
Buttons: Modify Search, New Search

Search Results

By Contact Code: All | By Contact Status:  Accepted  Rejected | Refine

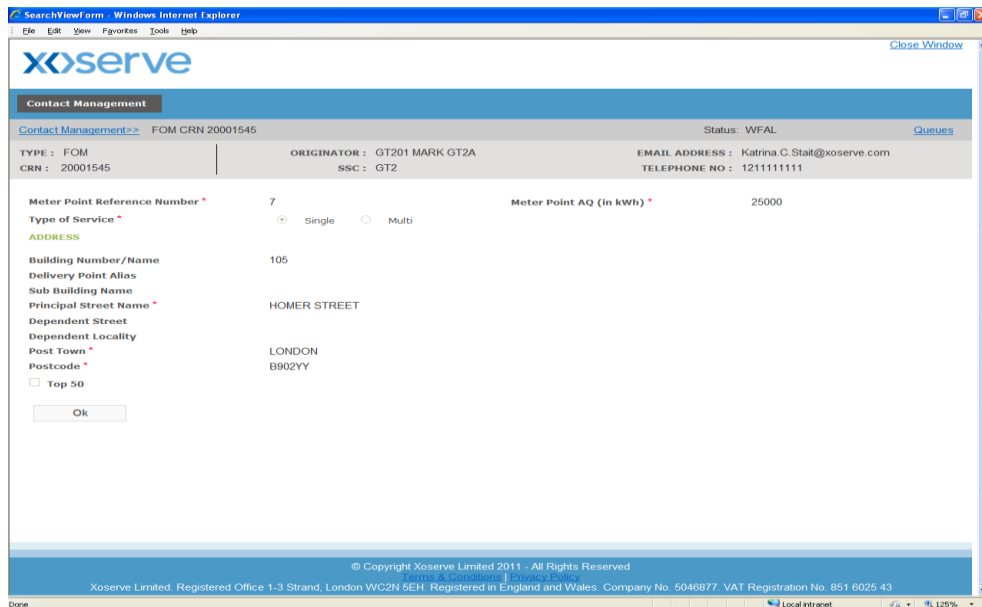
Download Result

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20004639	3240707701		ADD	GT2	GT201	ACCEPTED
20004639	1283279707		ADD	GT2	GT201	ACCEPTED

Exit

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The Accepted Contact will appear as follows....



SearchViewForm - Windows Internet Explorer

**xoserve**

Contact Management

Contact Management >> FOM CRN 20001545 | Status: WFAL | Queues

TYPE : FOM | ORIGINATOR : GT201 MARK GT2A | EMAIL ADDRESS : Katrina.C.Stall@xoserve.com  
CRN : 20001545 | SSC : GT2 | TELEPHONE NO : 1211111111

Meter Point Reference Number \* 7 | Meter Point AQ (in kWh) \* 25000

Type of Service \*  
 Single  Multi

ADDRESS

Building Number/Name 105

Delivery Point Alias

Sub Building Name

Principal Street Name \* HOMER STREET

Dependent Street

Dependent Locality

Post Town \* LONDON

Postcode \* B902YY

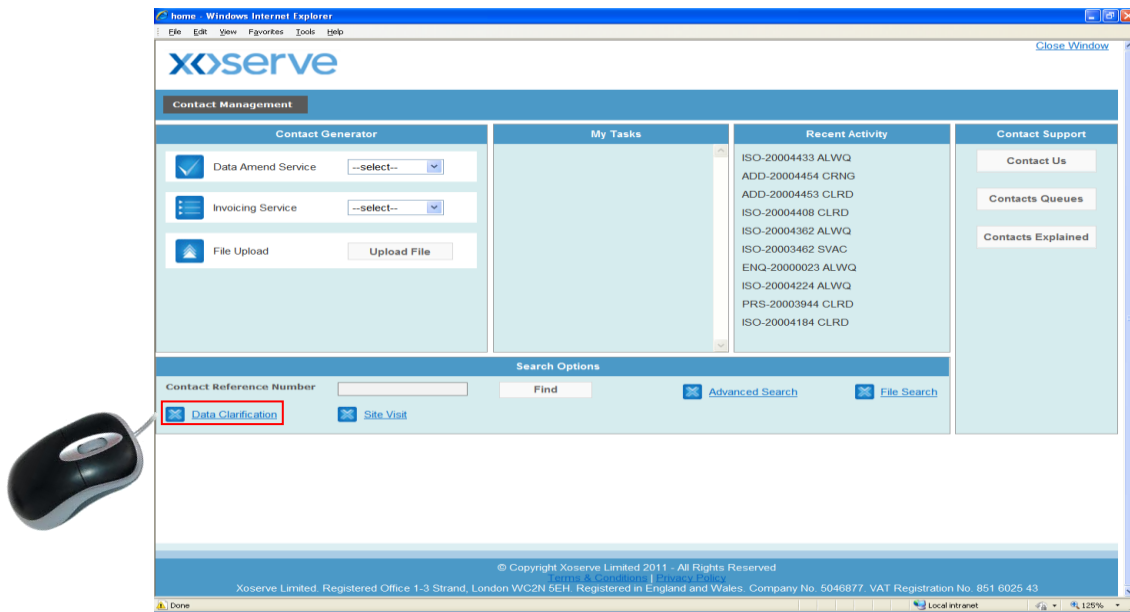
Top 50

Ok

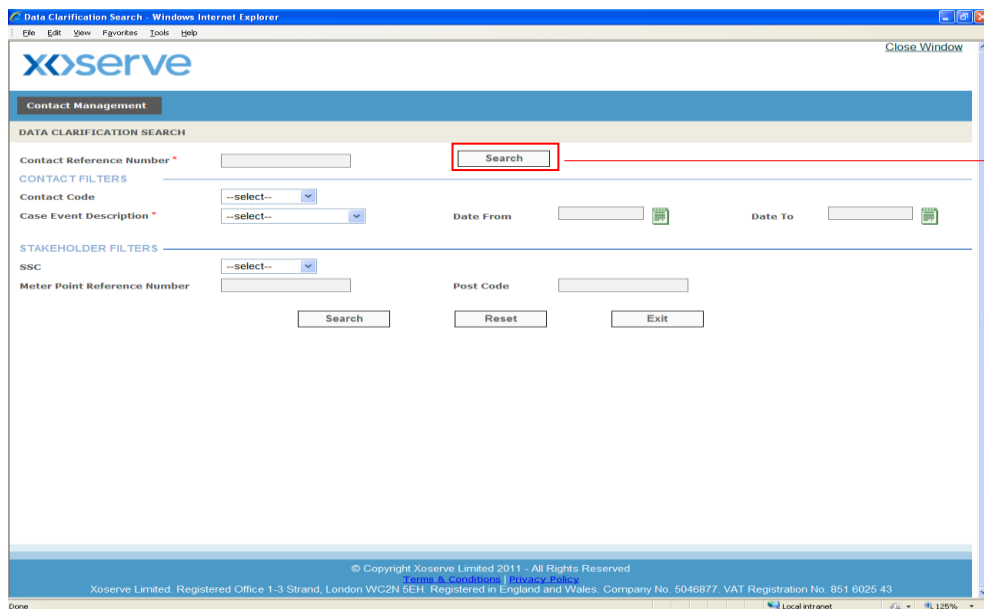
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## 7.5 Data Clarification Search

To complete a Data Clarification search, click on Data Clarification on the Contact Management home page.



The following filters will appear to complete the search. Two levels of searching can be performed here.

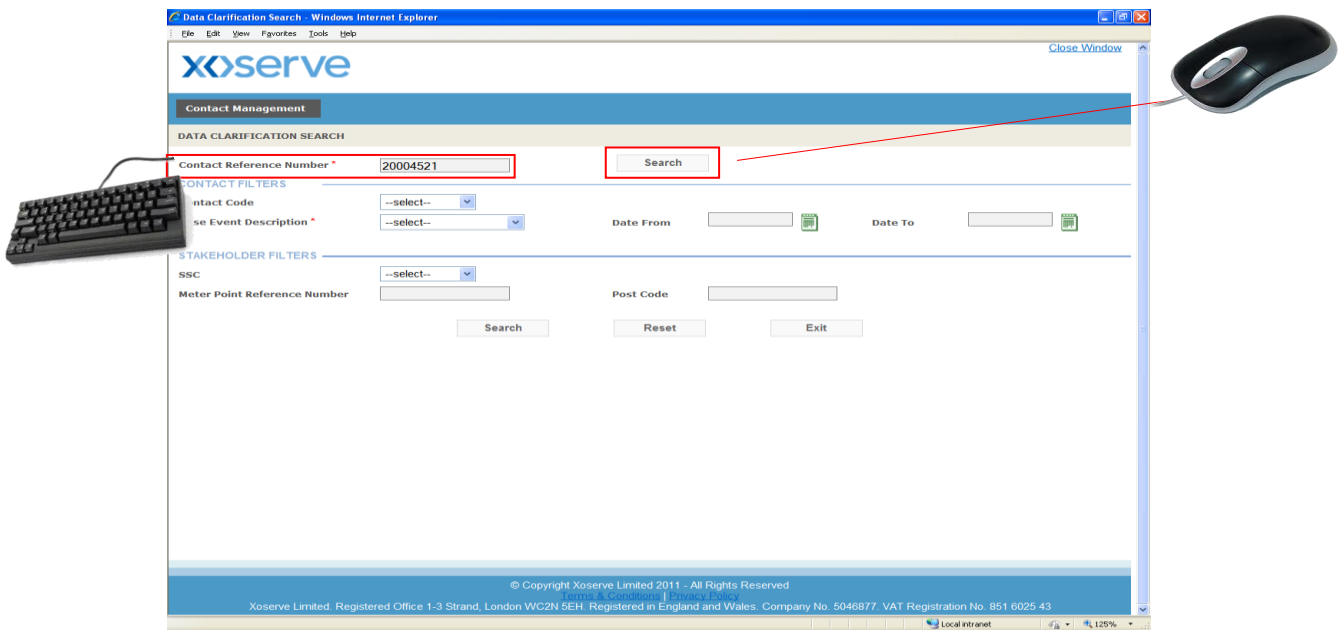


Search can be completed via CRN or various Filters. A CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

## Basic Search

Step 1 – Enter your CRN into the Contact Reference Number field

Step 2 – Click Search.



DATA CLARIFICATION SEARCH

Contact Reference Number \*

CONTACT FILTERS

Contact Code

Case Event Description \*

Date From   Date To

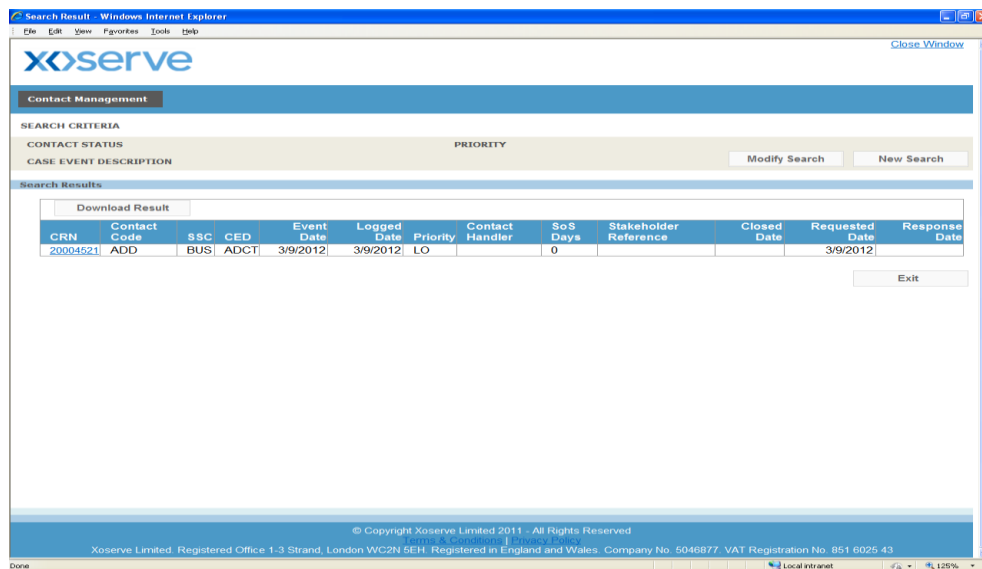
STAKEHOLDER FILTERS

SSC

Meter Point Reference Number  Post Code

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The results will be displayed as follows....



SEARCH RESULTS

CONTACT STATUS

SEARCH RESULTS

Download Result

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date
20004521	ADD	BUS	ADCT	3/9/2012	3/9/2012	LO		0			3/9/2012	

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Select the CRN and the Data Clarification form will appear.

## Filter Search

Step 1 – Enter your required information into the Contact Filters section

Step 2 – Click Search

Case event description allows you to search for a DC outstanding with your organisation or a DC at ADCT status which is a DC with a Third party Shipper.



Further search criteria are available in the Stakeholder Filters section

DATA CLARIFICATION SEARCH

Contact Reference Number \*  Search

CONTACT FILTERS

Contact Code

Case Event Description \*  Date From  Date To

STAKEHOLDER FILTERS

SSC

Meter Point Reference Number  Post Code

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The result will be displayed as follows....

SEARCH CRITERIA

CONTACT STATUS  PRIORITY

Search Results

Download Result

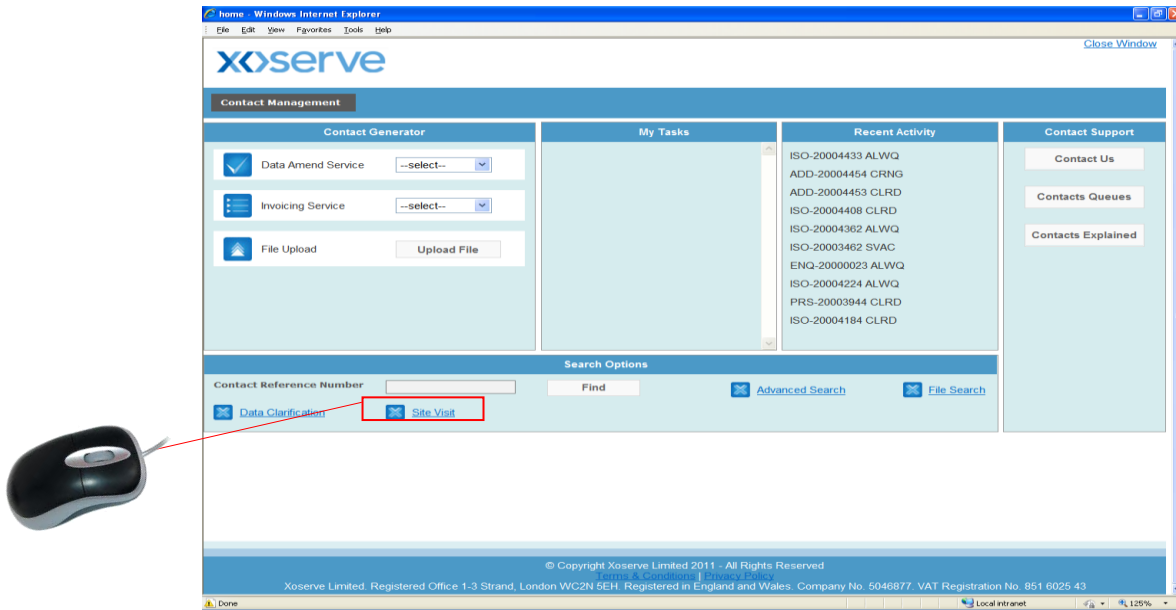
CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date
20004521	ADD	BUS	ADCT	3/9/2012	3/9/2012	LO		0			3/9/2012	

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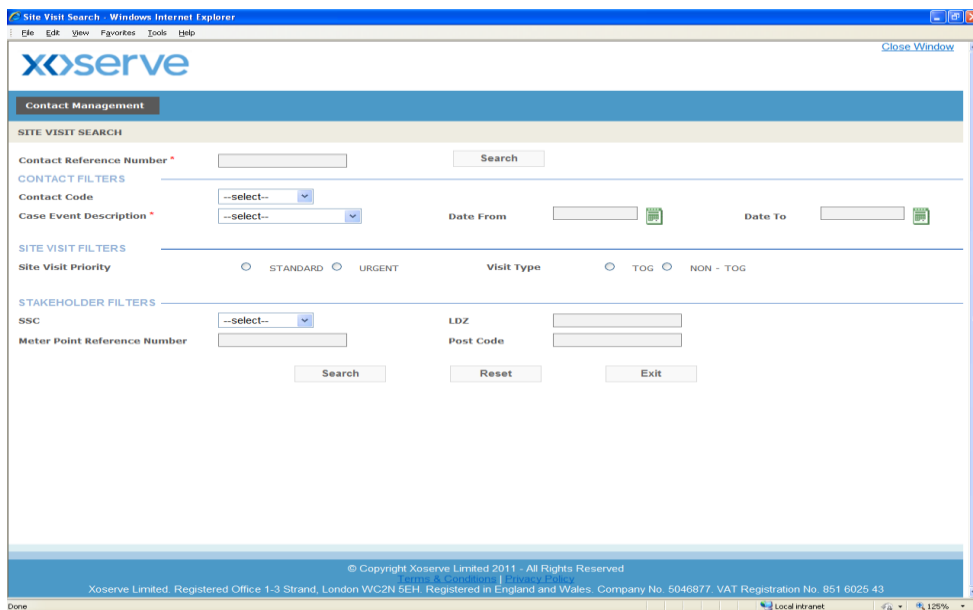
Select the CRN and the Data Clarification will appear.

## 7.6 Site Visit Search

To complete a Site Visit search, click on Site Visit on the Contact Management homepage.



The following filters will appear to complete the search. Two levels of searching can be performed here.

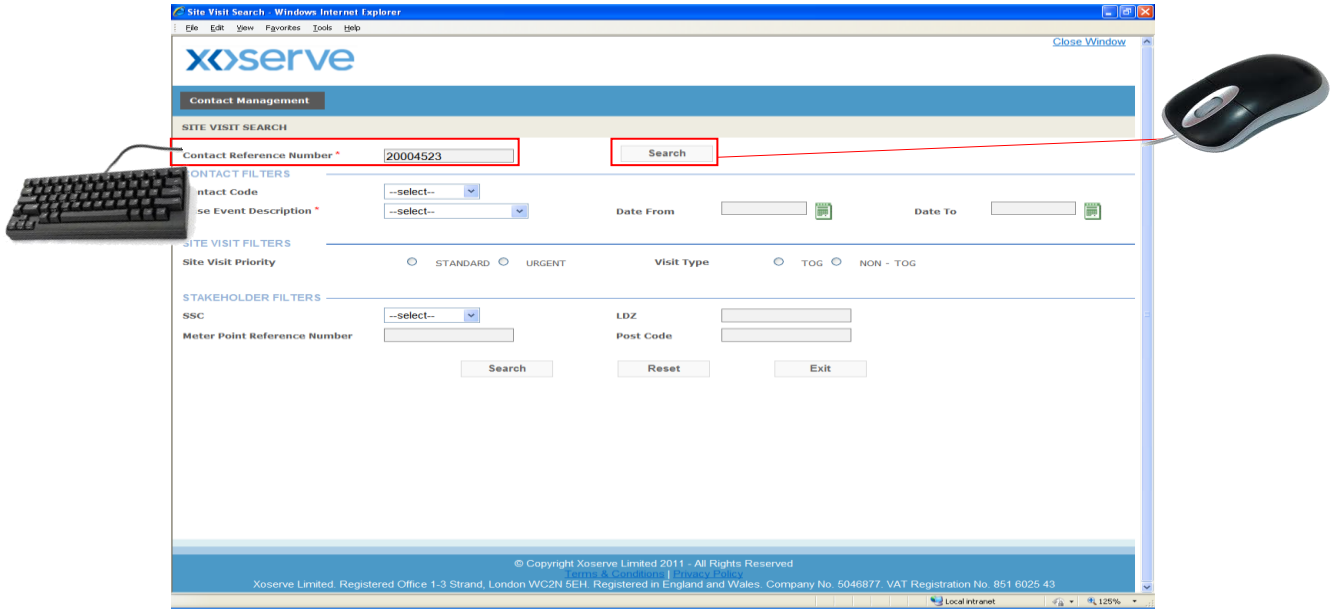


Search can be completed via CRN or various Filters . CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

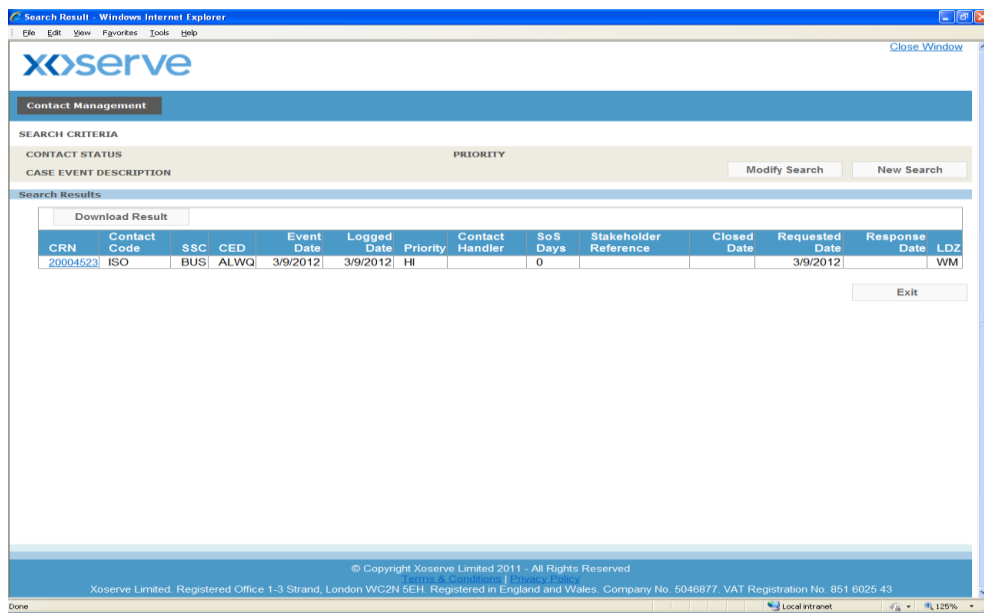
## Basic Search

Step 1 – Enter your CRN into the Contact Reference Number Field

Step 2 – Click Search



The results will be displayed as follows....



Select the CRN and the Site Visit will appear.

## Filter Search

Step 1 – Enter the required information into the Contact Filters section.

Step 2 – Click Search



Further search criteria are available in the Stakeholder Filters section

Case event description allows you to search for a SV outstanding with your organisation or a SV that is at NETR which is a SV back with Xoserve.

The result will be displayed as follows....

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date	LDZ
20001229	ISO	BUS	NETR	13/6/2012	16/5/2012	HI		75			13/6/2012	13/6/2012	WM
20001278	ISO	BUS	NETR	19/6/2012	17/5/2012	HI		74			13/6/2012	19/6/2012	WM
20001483	ISO	UNI	NETR	28/5/2012	21/5/2012	HI		72			28/5/2012	28/5/2012	NW
20002001	ISO	BUS	NETR	28/5/2012	28/5/2012	HI		67			28/5/2012	28/5/2012	EA
20002218	ISO	BUS	NETR	30/5/2012	28/5/2012	HI		67			30/5/2012	30/5/2012	EA
20002219	ISO	BUS	NETR	12/6/2012	28/5/2012	HI		67			12/6/2012	12/6/2012	WM
20002242	ISO	BUS	NETR	8/6/2012	30/5/2012	HI		65			30/5/2012	8/6/2012	NT
20002243	ISO	BUS	NETR	30/5/2012	30/5/2012	HI		65			30/5/2012	30/5/2012	EM
20002244	ISO	BUS	NETR	30/5/2012	30/5/2012	HI		65			30/5/2012	30/5/2012	WM
20002245	ISO	BUS	NETR	12/6/2012	30/5/2012	HI		65			12/6/2012	12/6/2012	WM

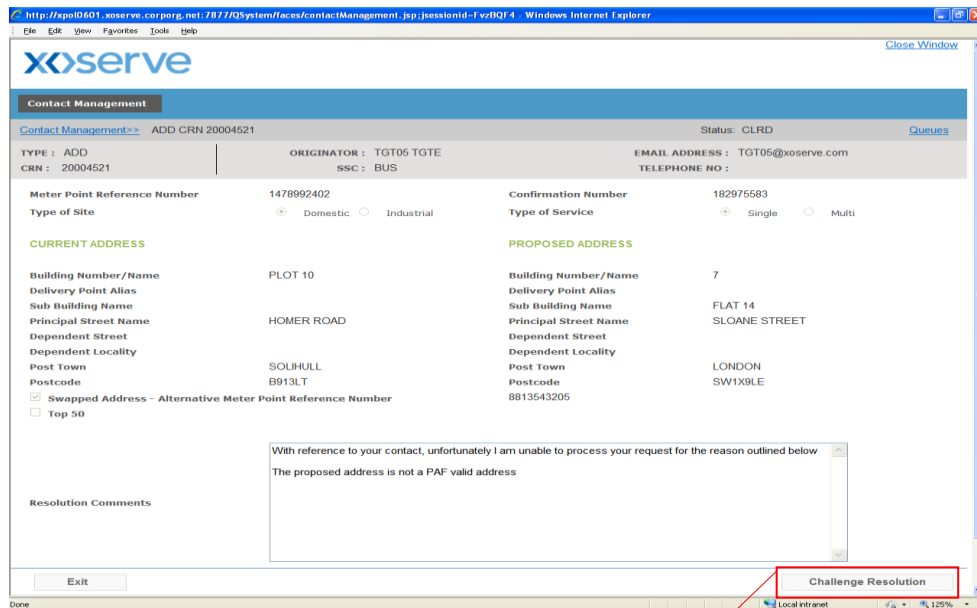
Select the CRN and the Site Visit will appear.

## 8. Previously Submitted Contacts

### 8.1 Raising a Previously Submitted Contact

If you do not agree with the resolution of your Contact then you have the ability to challenge it.

This feature can be found at the foot of the screen which displays the resolution comments provided for your Contact.




The screenshot shows a web browser window displaying the XOServe Contact Management interface. The page title is "Contact Management" and the URL is "http://xpol0601.xoserve.co.porg.net:7877/QSystem/faces/contactManagement.jspx;jsessionid=1FvzBQf4". The interface shows details for a contact with CRN 20004521. The status is "CLRD". The contact details include:


TYPE : ADD	ORIGINATOR : TGT05 TGTE	EMAIL ADDRESS : TGT05@xoserve.com
CRN : 20004521	SSC : BUS	TELEPHONE NO :

Resolution Comments:

With reference to your contact, unfortunately I am unable to process your request for the reason outlined below  
The proposed address is not a PAF valid address

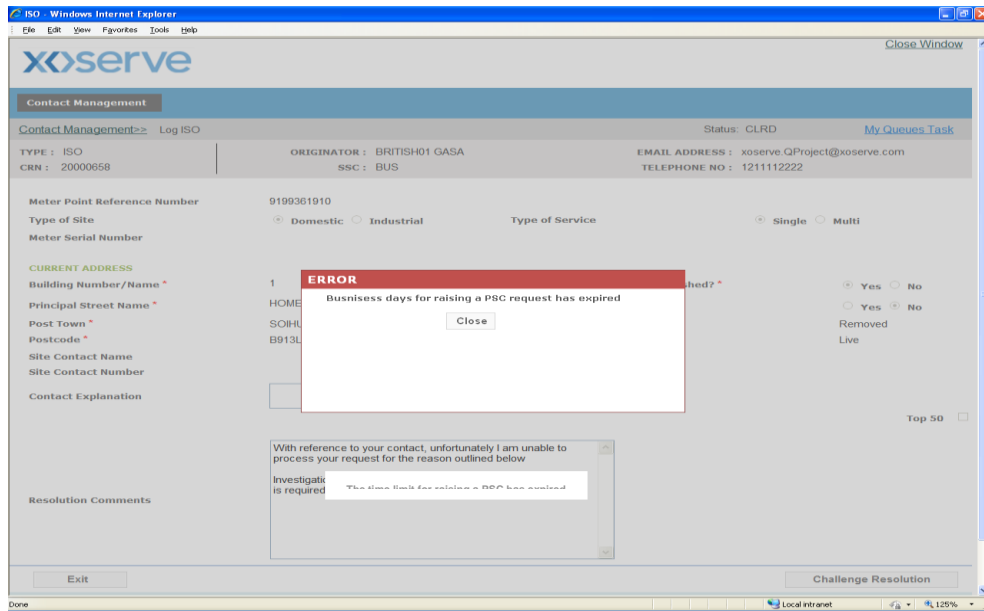
At the bottom right of the page, there is a button labeled "Challenge Resolution" which is highlighted with a red box. A mouse cursor is pointing at this button.

 You are not able to edit any details on this screen.

 Data Amend Service – The response can be challenged within 12 business days



If the time period has elapsed and beyond the window that you are able to challenge a resolved Contact, the following message will appear.

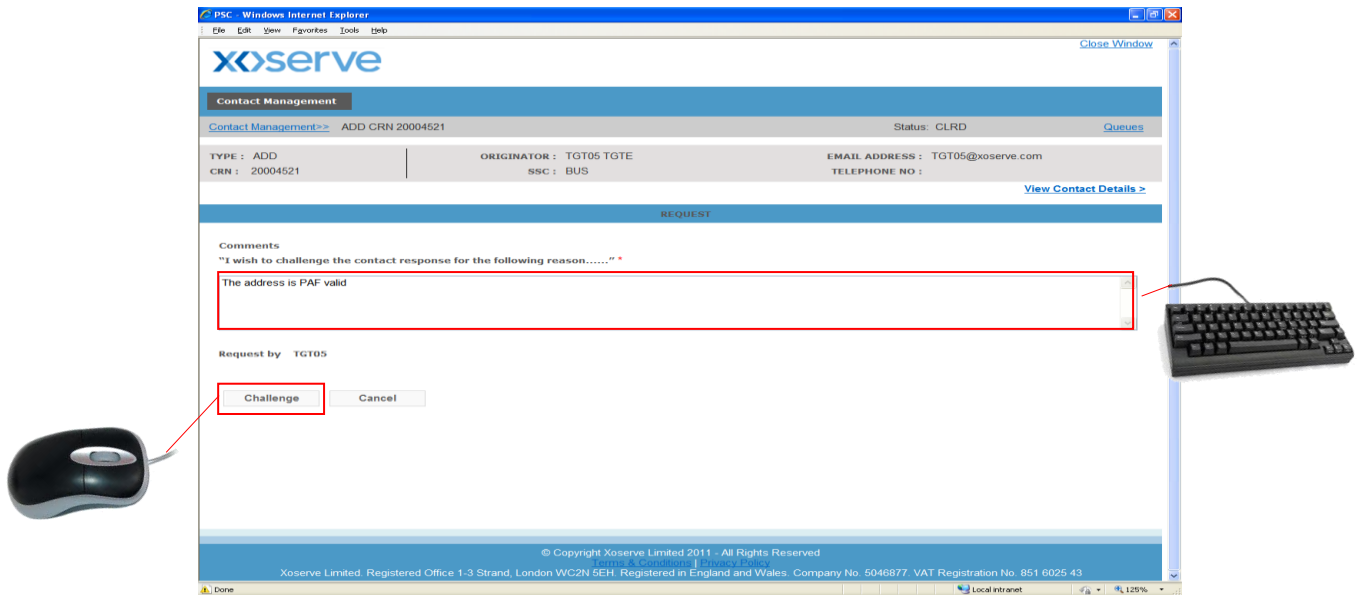



If the Contact is within the allowable timescales when clicking Challenge Resolution the following screen will appear.


appear.

Step 1 – Enter your comments

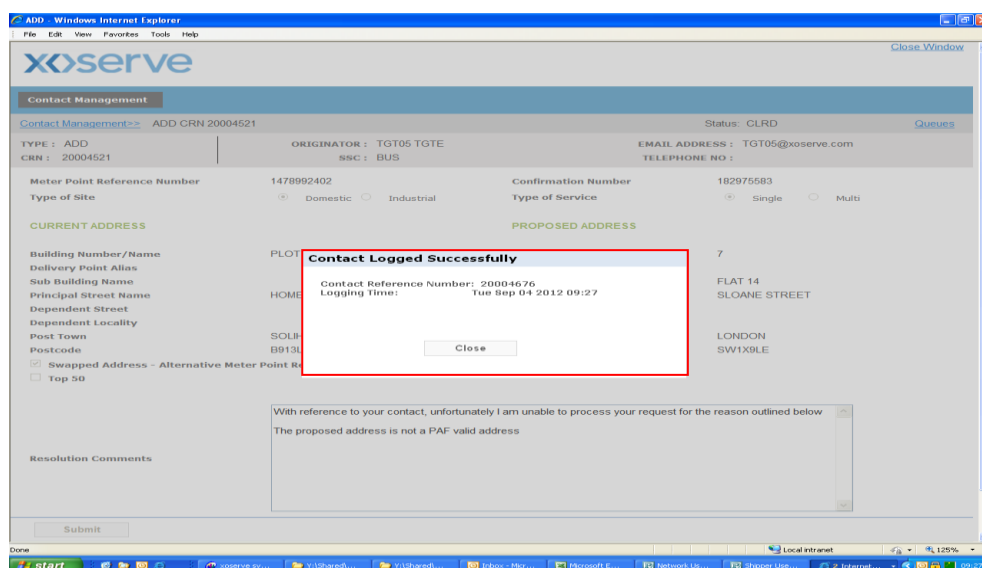
Step 2 – Click Challenge.



 Your Challenge must not contain detail that was omitted from your original Contact. Please raise a further Contact if you have additional information.

 You can write up to 2000 characters in the Comments box.

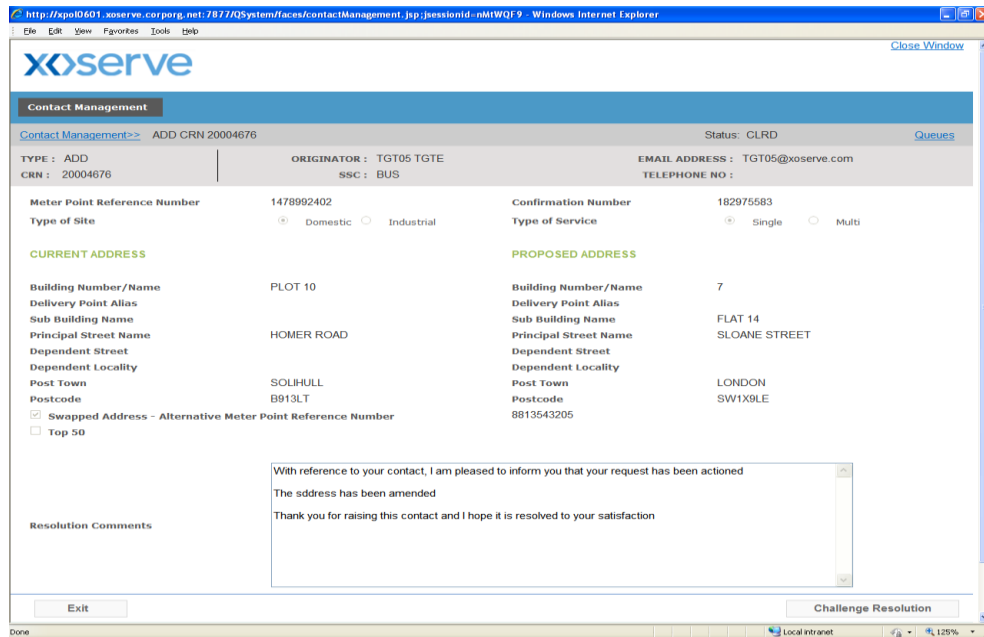
The following message will appear confirming the Contact has been submitted and the new Contact Reference Number for your request.



## 8.1 Receiving a Previously Submitted Contact Response

Once Xoserve has investigated your challenge, it could have two possible outcomes. Upheld or Reject.

To view the action Xoserve have completed, find the CRN through search and the response will show as follows with the relevant Resolution Comments for the PSC....



The screenshot displays the Xoserve Contact Management interface. The page title is "Contact Management" and the URL is "http://xpol0601.xoserve.co.uk/org.net:7877/QSystem/faces/contactManagement.jsp;\_af5essionid=nm1WQF9". The interface shows contact details for CRN 20004676, including the originator (TGT05 TGTE), email address (TGT05@xoserve.com), and status (CLRCD). It also displays current and proposed addresses, and a resolution comment.

Contact Management		Status: CLRCD	
TYPE : ADD	ORIGINATOR : TGT05 TGTE	EMAIL ADDRESS : TGT05@xoserve.com	
CRN : 20004676	SSC : BUS	TELEPHONE NO :	
Meter Point Reference Number	1478992402	Confirmation Number	182975583
Type of Site	<input checked="" type="radio"/> Domestic <input type="radio"/> Industrial	Type of Service	<input checked="" type="radio"/> Single <input type="radio"/> Multi
<b>CURRENT ADDRESS</b>		<b>PROPOSED ADDRESS</b>	
Building Number/Name	PLOT 10	Building Number/Name	7
Delivery Point Alias		Delivery Point Alias	
Sub Building Name		Sub Building Name	FLAT 14
Principal Street Name	HOMER ROAD	Principal Street Name	SLOANE STREET
Dependent Street		Dependent Street	
Dependent Locality		Dependent Locality	
Post Town	SOLIHULL	Post Town	LONDON
Postcode	B913LT	Postcode	SW1X9LE
<input checked="" type="checkbox"/> Swapped Address - Alternative Meter Point Reference Number		8813543205	
<input type="checkbox"/> Top 50			
Resolution Comments			
With reference to your contact, I am pleased to inform you that your request has been actioned The address has been amended Thank you for raising this contact and I hope it is resolved to your satisfaction			
Exit		Challenge Resolution	



The previously submitted Contact is subject to Query Management Standards of Service and is treated as a high priority.