



**Contact Management
User Guide
iGT Edition**

Version 2.0

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Introduction

This User Guide is designed to provide a clear understanding of The Contact Management Service.

The guide contains:-

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

There are a number of symbols throughout the User Guide, the symbols and their meaning are included below.



Information



Warning



Area of interest



Mouse click required



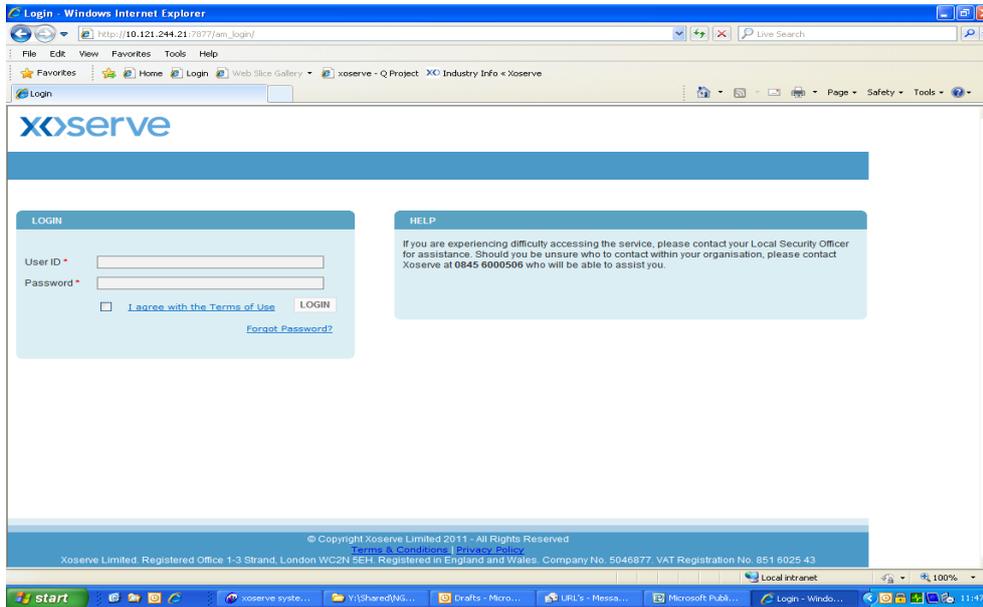
Keyboard entry required

Section 2

Log onto Contact Management

2.1 Log onto the Contact Management system

The portal Login Page looks as follows....

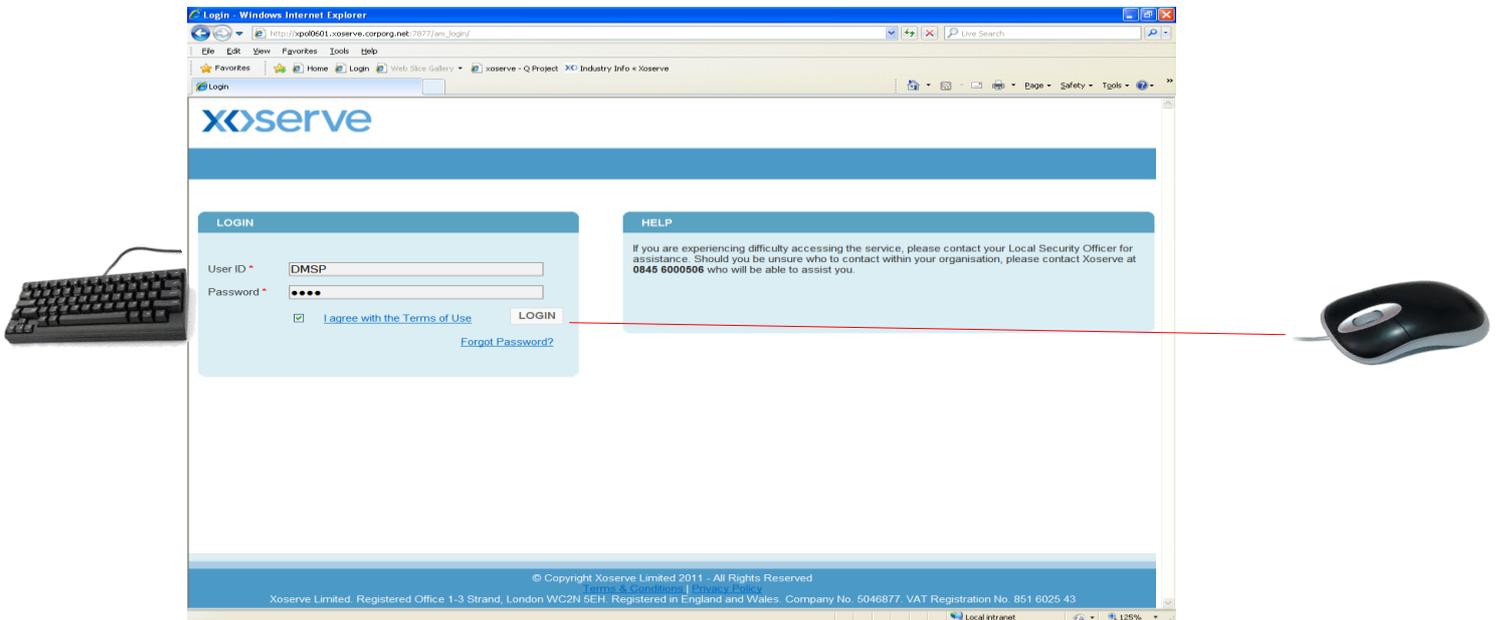


Step 1 – Enter your User ID

Step 2 – Enter your Password

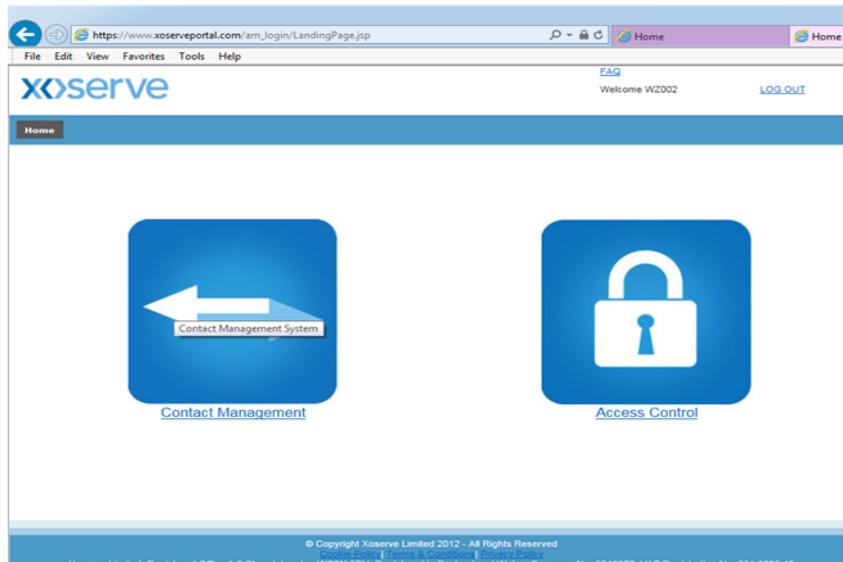
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



2.2 Contact Management Service Page

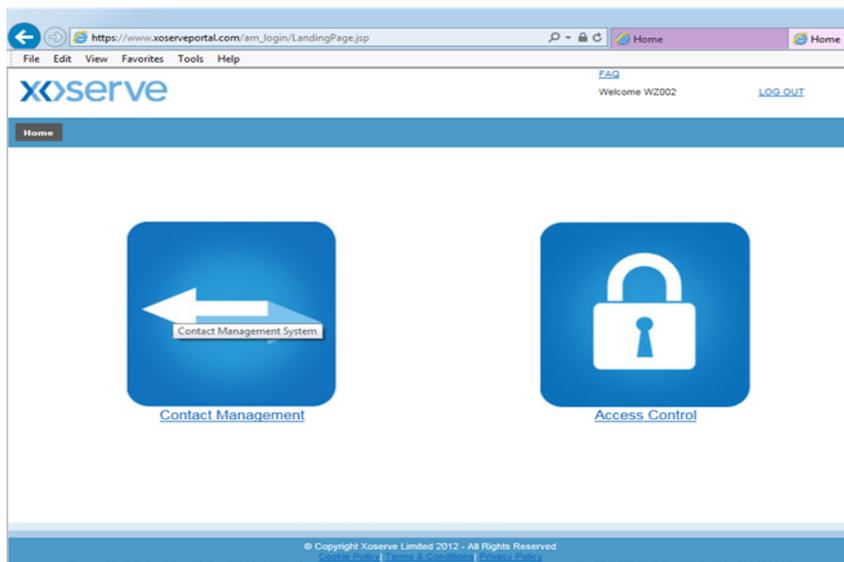
The following Service Page will appear....



There are two services on this page:-

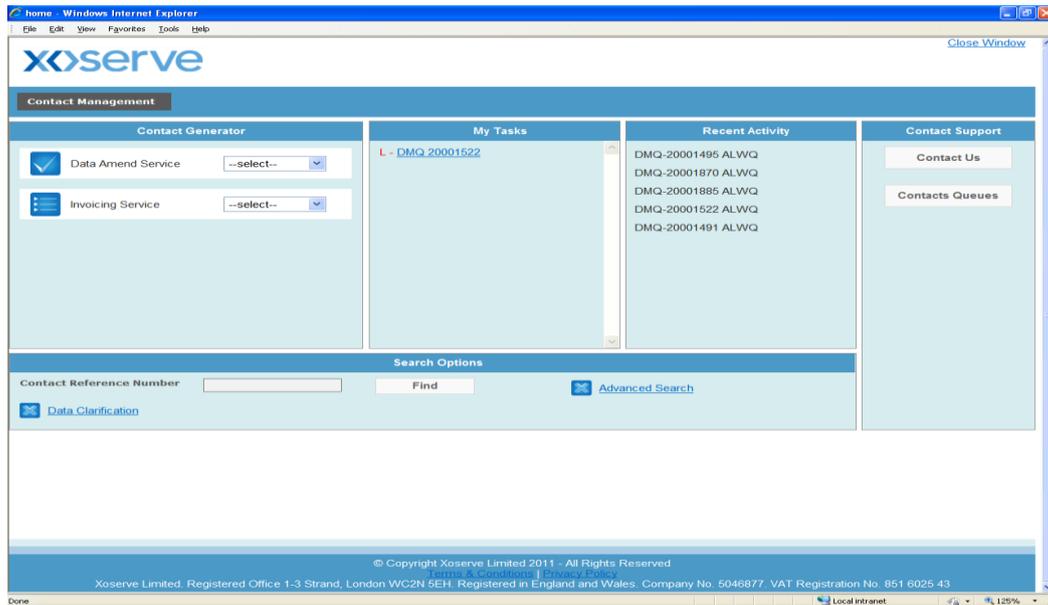
- ⇒ Contact Management
- ⇒ Access Controls

Click Contact Management and this will take you to Contact Management home page.



Click Xoserve logo and you are taken to Xoserve.com

2.3 Contact Management Home Page



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

Zone 1

Contact Generator – This section is not applicable to you.

Zone 2

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

Zone 3

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

Zone 4

Contact Support – This area is made up of 'Contact Us' and 'Contact Queues'. 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 investigation.

Zone 5

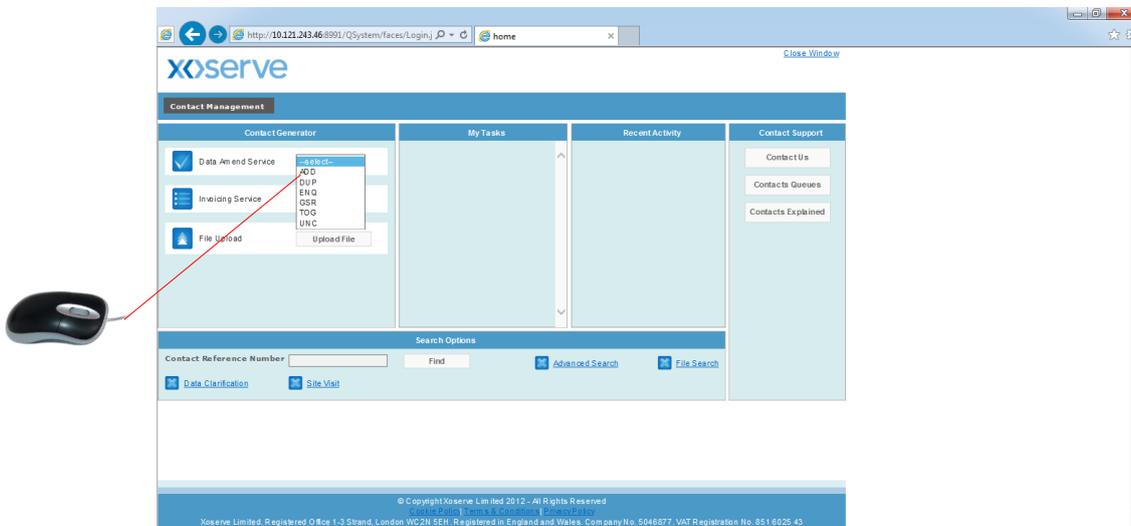
Search Options – This section includes a variety of search facilities. Contact Reference Number Search and Advanced Search will find Contacts raised in The Contact Management system. Data Clarification search returns Contacts that are currently at DC stage of the process.

Section 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 data against our source systems. This will occur across a number of Contact Types.

The screenshot shows the 'ADD' form in the Xoserve Contact Management system. The form is titled 'ADD - Windows Internet Explorer' and includes the Xoserve logo. The 'Contact Management' section shows 'Log ADD' and 'Status: New'. The form fields are as follows:

TYPE : ADD	ORIGINATOR : BRITISH02 GA SSC * : BUS	EMAIL ADDRESS : BGas02@xoserve.com TELEPHONE NO :
Meter Point Reference Number * : 1113475601	Confirmation Number * : 186866537	
Type of Site * : <input checked="" type="radio"/> Domestic <input type="radio"/> Industrial	Type of Service * : <input checked="" type="radio"/> Single <input type="radio"/> Multi	
CURRENT ADDRESS	PROPOSED ADDRESS	
Building Number/Name * : 1	Building Number/Name * : 2	
Delivery Point Alias	Delivery Point Alias	
Sub Building Name	Sub Building Name	
Principal Street Name * : Homer Road	Principal Street Name * : Homer Road	
Dependent Street	Dependent Street	
Dependent Locality	Dependent Locality	
Post Town * : Solihull	Post Town * : Solihull	
Postcode * : B91 3LT	Postcode * : B91 3LT	

At the bottom, there is a checkbox for 'Swapped Address -', 'Submit' and 'Cancel' buttons, and a 'Top 50' link. The footer contains copyright information for Xoserve Limited, 2011.



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

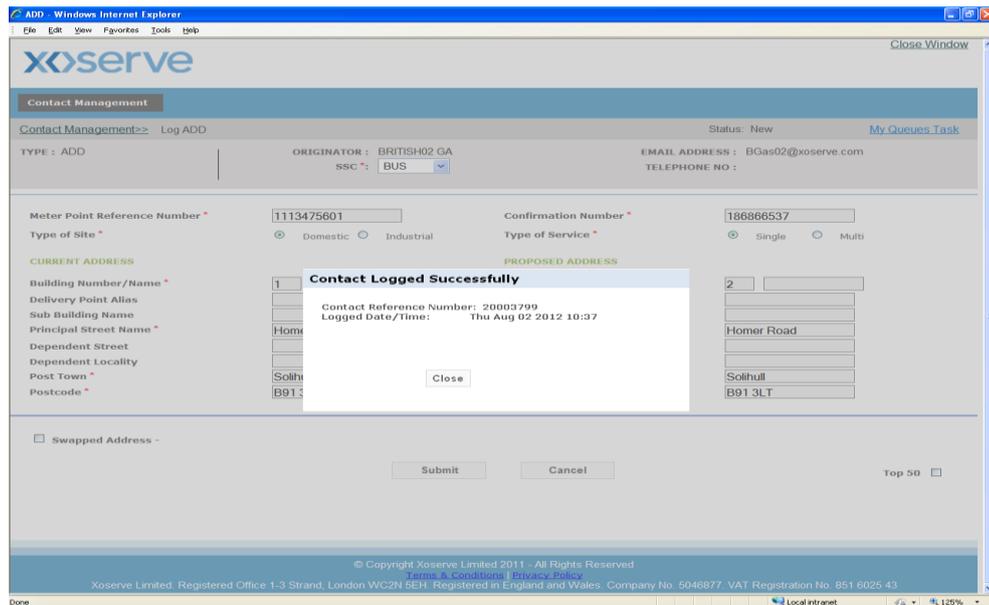


Close Window will take you to the Services Page. If you want to revert back to the Contact Management home page, click Cancel.

3.1 Log a Contact via Screen

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



The screenshot shows a web browser window displaying the Xoserve Contact Management interface. A modal dialog box titled "Contact Logged Successfully" is centered on the screen. The dialog contains the following information:

- Contact Reference Number: 20003799
- Logged Date/Time: Thu Aug 02 2012 10:37

The background interface shows a form for logging a contact. The form includes fields for:

- Meter Point Reference Number: 1113475601
- Confirmation Number: 186806537
- Type of Site: Domestic (selected)
- Type of Service: Single (selected)
- Current Address fields: Building Number/Name, Delivery Point Alias, Sub Building Name, Principal Street Name, Dependent Street, Dependent Locality, Post Town, Postcode.
- Proposed Address fields: Building Number/Name, Delivery Point Alias, Sub Building Name, Principal Street Name, Dependent Street, Dependent Locality, Post Town, Postcode.

Buttons for "Submit" and "Cancel" are visible at the bottom of the form. The footer of the page contains copyright information for Xoserve Limited 2011.



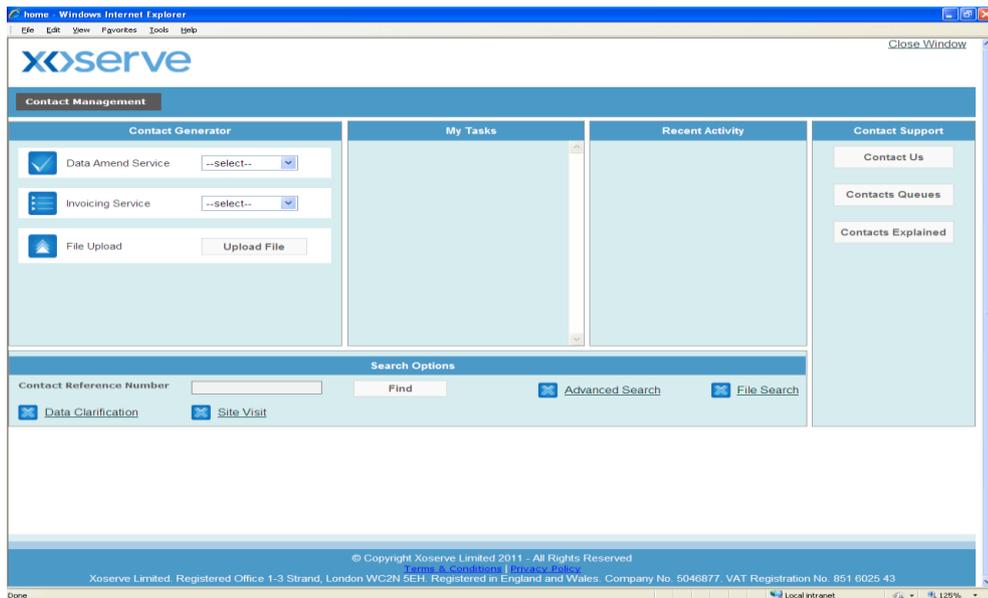
You may want to make a note of the Contact Reference Number, however you will see it appear in 'Recent Activity' on the Contact Management home page.

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
1	V1.0 Xoserve	QMP [M] [T3]	Stakeholder ID [M] [N10]	Originator Code [M] [T3]	Stakeholder Personnel's Name [M] [T60]	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]
2														
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.

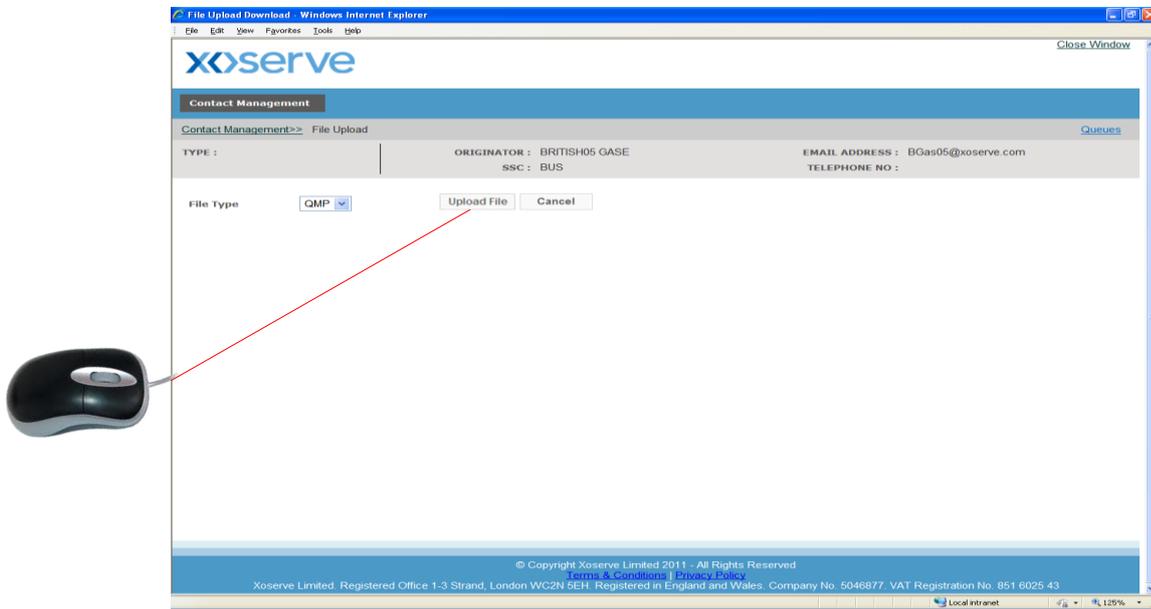


3.2 File Upload

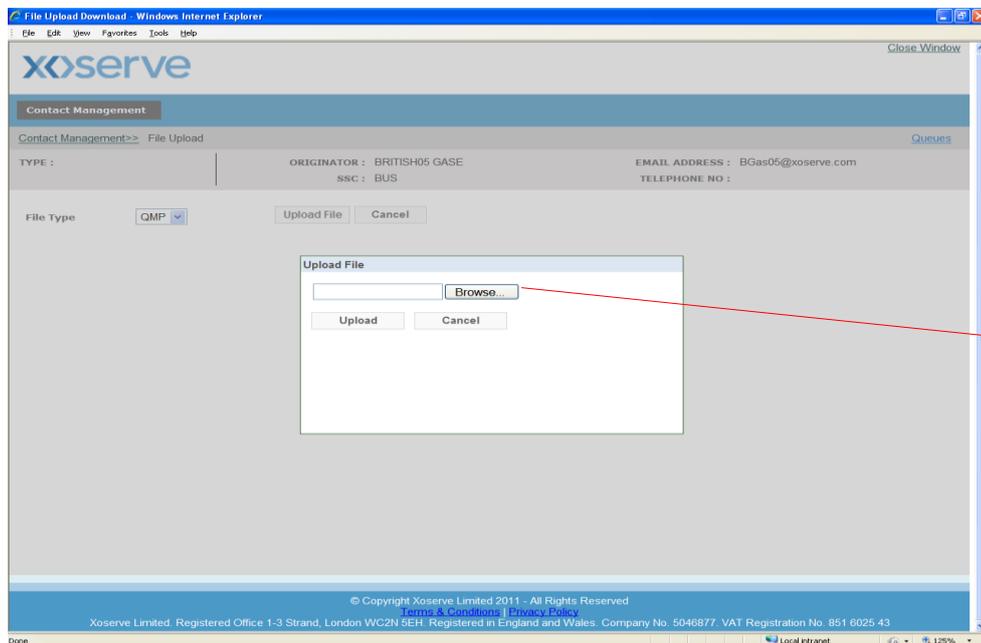
The following screen will appear.



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

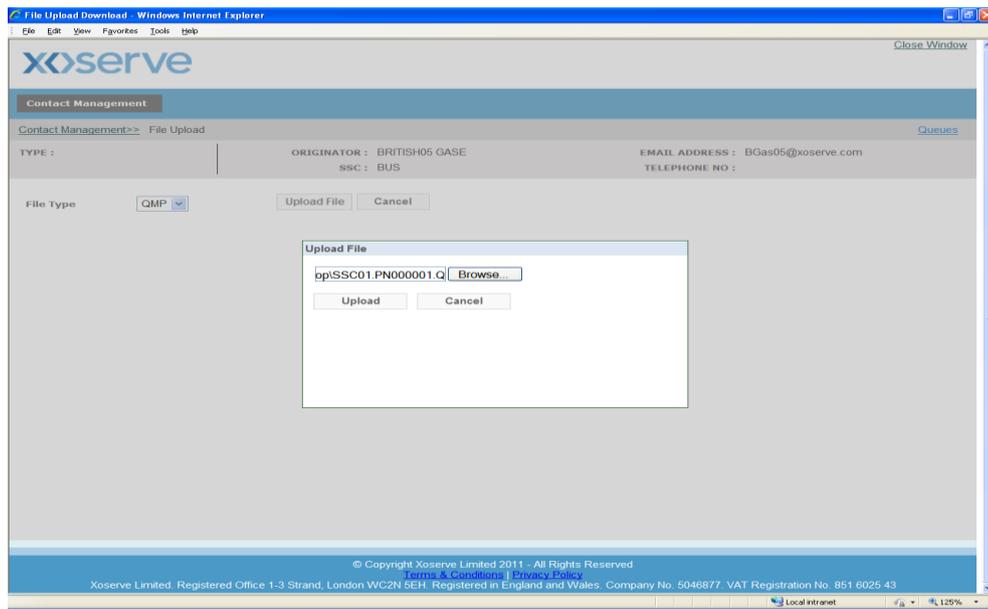


Select File Upload and the File Upload screen will appear....



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.

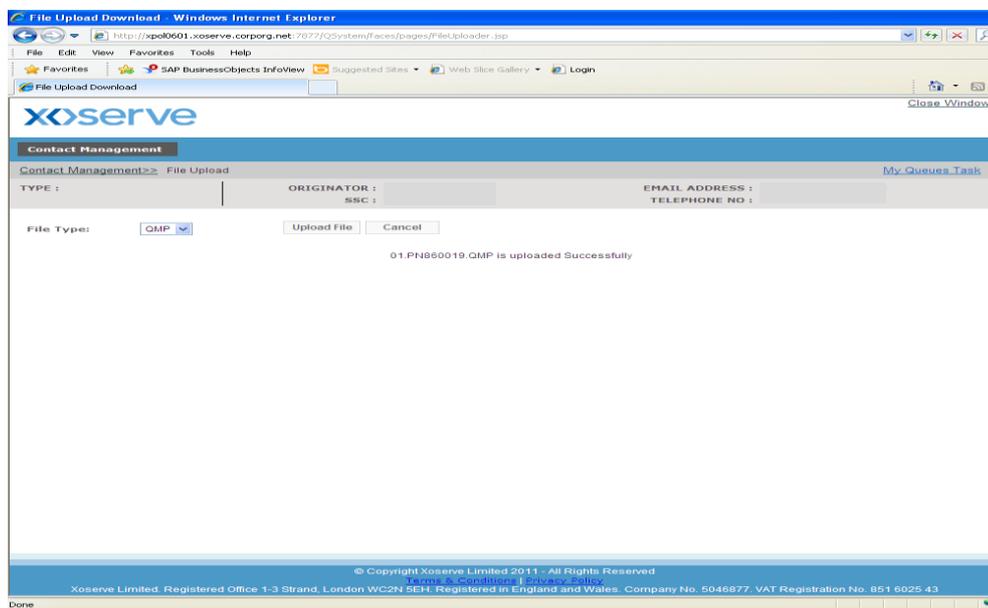
3.2 File Upload



Select Upload, and the file is submitted.

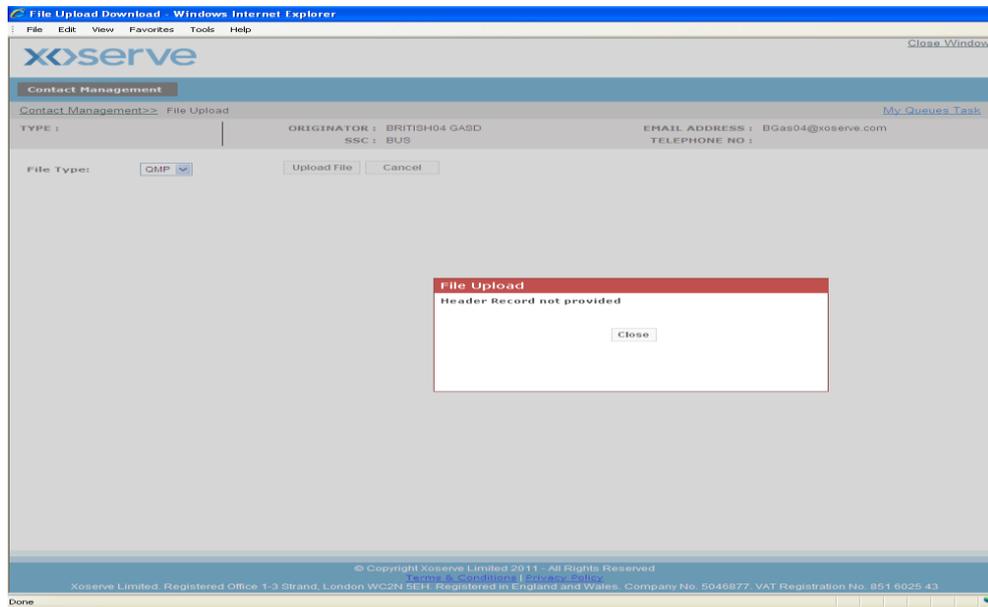
You will receive a message at this point stating whether the submission has successfully loaded or rejected.

A successfully submitted file will show as follows....



3.2 File Upload

An unsuccessfully submitted file will show as follows....



There are a number of reasons why a file might reject. These 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.

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 * 1113475601 Confirmation Number * 186866537
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 Delivery Point Alias
Sub Building Name Sub Building Name
Principal Street Name * Homer Road Principal Street Name * Homer Road
Dependent Street Dependent Street
Dependent Locality 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.

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 Logged Successfully

Contact Explanation

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

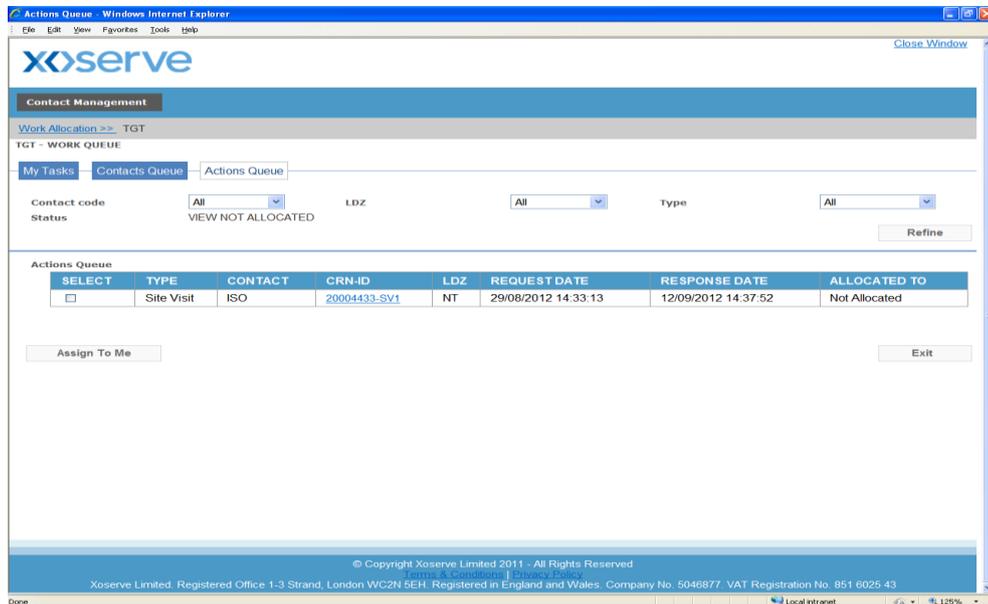
© Copyright Xoserve Limited 2011 - All Rights Reserved
Xoserve Limited Registered Office 1-3 Strand, London WC2N 5EH. Registered in England and Wales. Company No. 5046877. VAT Registration No. 851 6025 43

Section 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 navigation tabs for "My Tasks", "Contacts Queue", and "Actions Queue". Below the tabs, there are filter options for "Contact code" (All), "LDZ" (All), and "Type" (All). The status is "VIEW NOT ALLOCATED". A table titled "Actions Queue" contains one row of data:

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

Buttons for "Assign To Me" and "Exit" are visible below the table. The footer contains copyright information for Xoserve Limited 2011.

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

Actions Queue

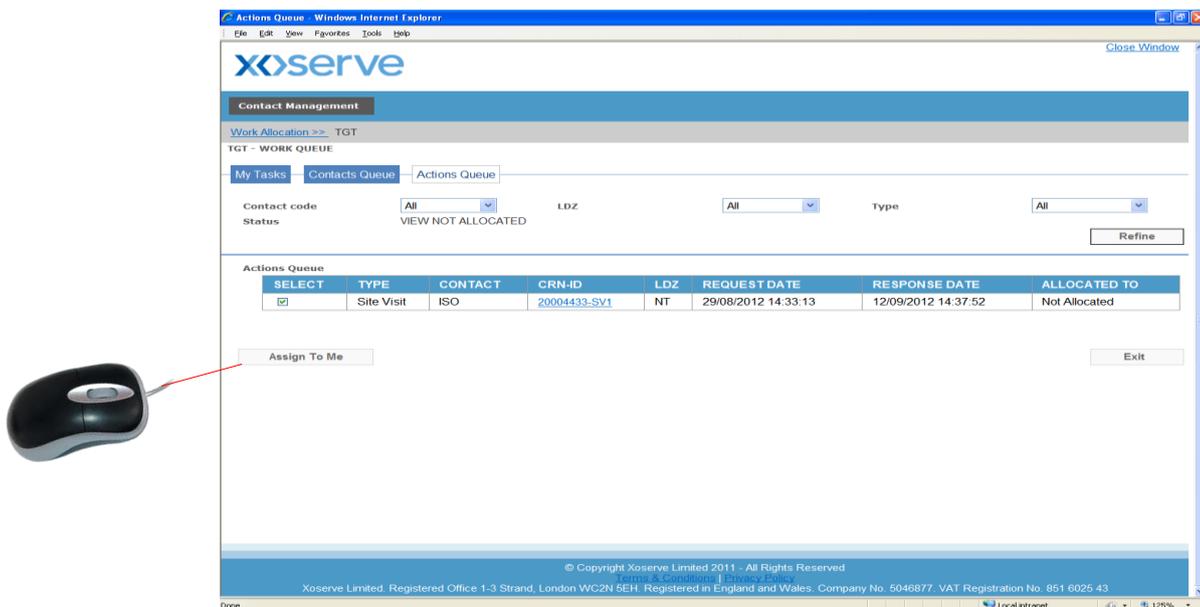
The Contacts Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue may be as a result of a Contact raised by a Shipper, e.g. Data Clarification or Site Visit.

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.



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 filter options for 'Contact code' (All), 'LDZ' (All), and 'Type' (All). A table titled 'Actions Queue' contains the following data:

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

Below the table, there is an 'Assign To Me' button and an 'Exit' button. A mouse cursor is pointing to the 'Assign To Me' button.

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

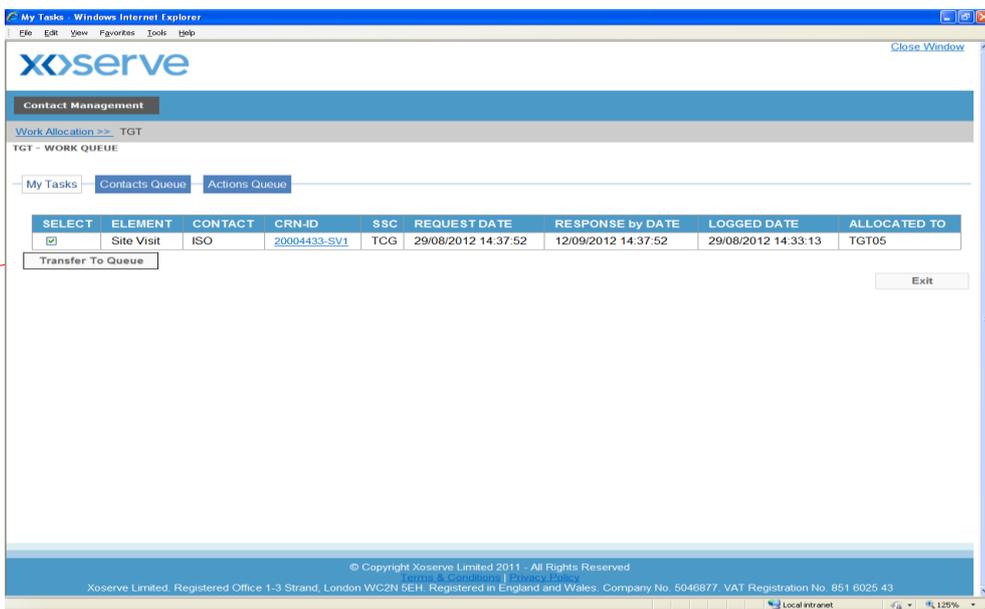
My Tasks

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.



The screenshot shows a web browser window titled 'My Tasks - Windows Internet Explorer' displaying the Xoserve 'Contact Management' interface. The page is titled 'TGT - WORK QUEUE' and has three tabs: 'My Tasks', 'Contacts Queue', and 'Actions Queue'. A table with the following columns is visible: SELECT, ELEMENT, CONTACT, CRN-ID, SSC, REQUEST DATE, RESPONSE by DATE, LOGGED DATE, and ALLOCATED TO. A single row is shown with a checked checkbox in the 'SELECT' column, 'Site Visit' in 'ELEMENT', 'ISO' in 'CONTACT', '20004433-SV1' in 'CRN-ID', 'TCG' in 'SSC', '29/08/2012 14:37:52' in 'REQUEST DATE', '12/09/2012 14:37:52' in 'RESPONSE by DATE', '29/08/2012 14:33:13' in 'LOGGED DATE', and 'TGT05' in 'ALLOCATED TO'. Below the table is a 'Transfer To Queue' button, which is highlighted by a red line from a mouse cursor. An 'Exit' button is also present. The footer contains copyright information for Xoserve Limited 2011 and company details.

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

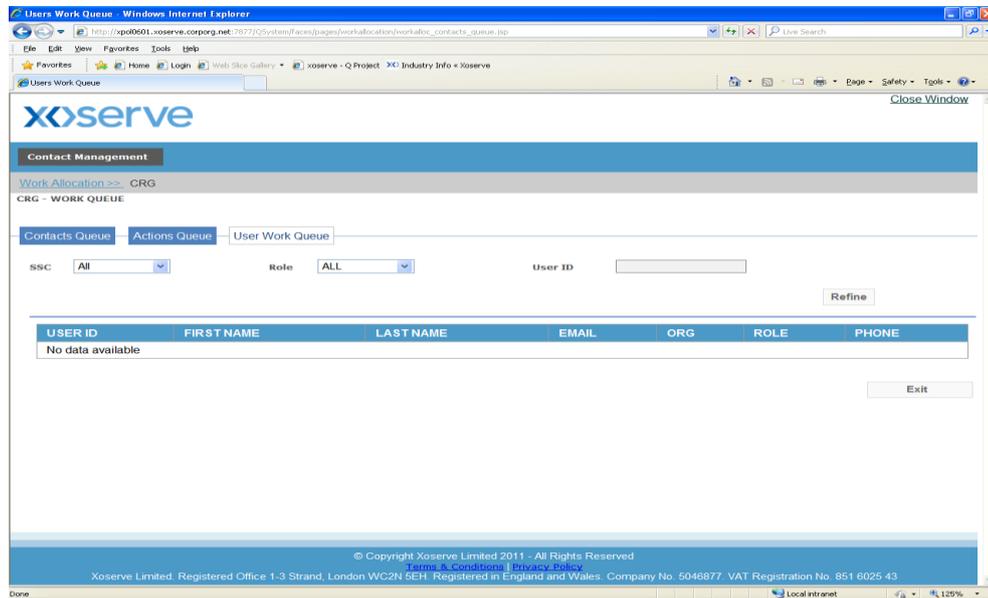
This will then appear in the Action Queue and can be worked upon by another person.



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 Assigning a Contact - Supervisor

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

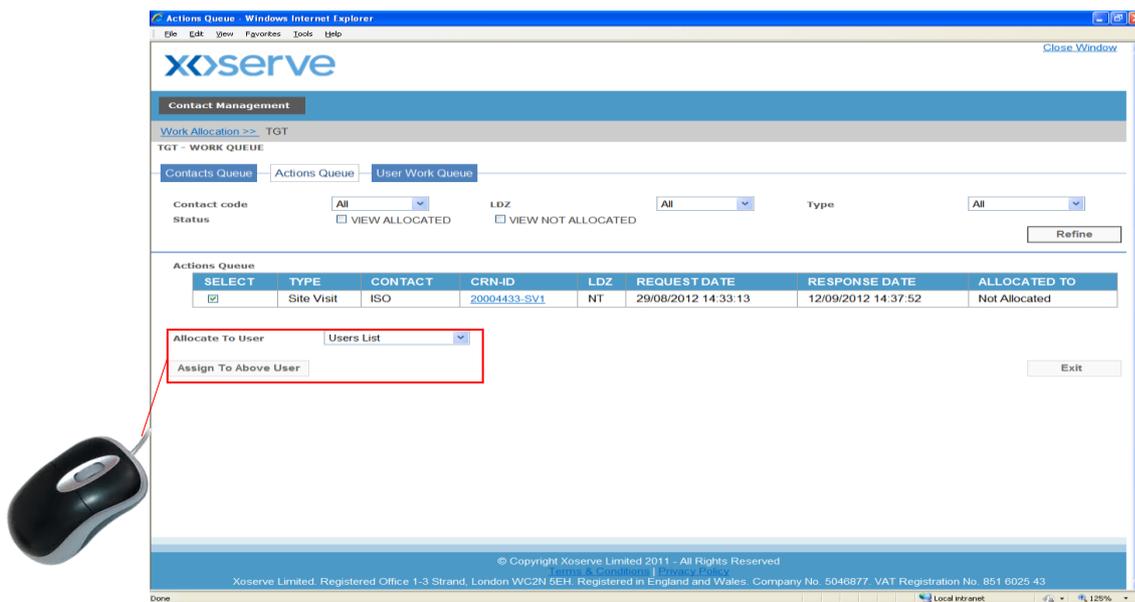
Step 1 – Find the Contact in the queue

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 screenshot shows the Xoserve web application interface. At the top, there's a navigation bar with 'Contact Management' and 'Work Allocation >> TGT'. Below that, there are tabs for 'Contacts Queue', 'Actions Queue', and 'User Work Queue'. The 'Actions Queue' tab is active, showing a table of contacts. The table has the following data:

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

Below the table, there is a red box highlighting the 'Allocate To User' dropdown menu and the 'Assign To Above User' button. The dropdown menu is currently set to 'Users List'. The 'Assign To Above User' button is located below the dropdown menu. The page footer contains copyright information for Xoserve Limited 2011.

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.

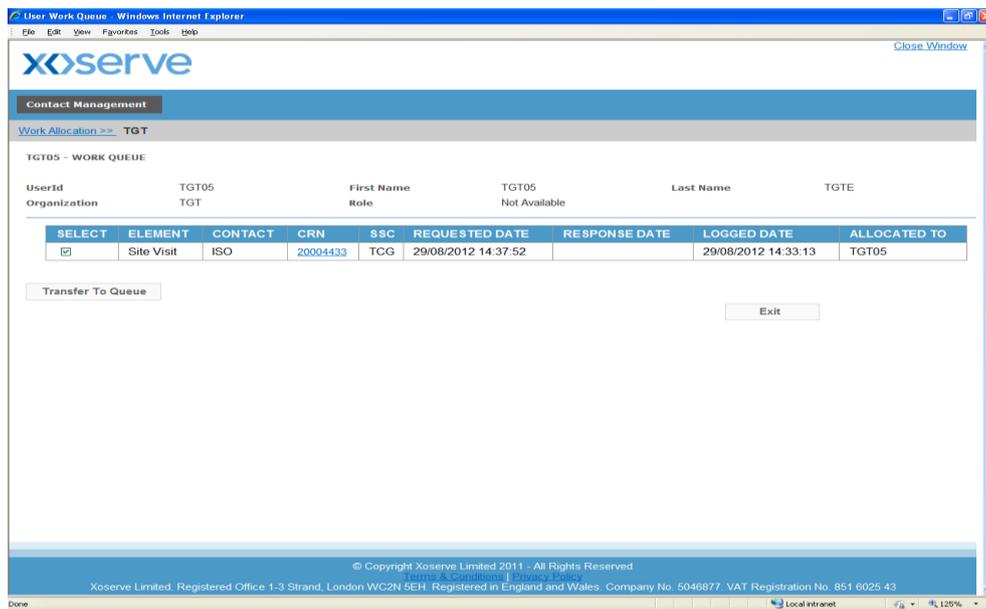
Step 1 – Select Contacts Queues on the Contact Management home page

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 Xserve logo and a 'Contact Management' section. Under 'Work Allocation >> TGT', there is a sub-section 'TGT05 - WORK QUEUE'. Below this, there are fields for 'UserId' (TGT05), 'First Name' (TGT05), and 'Last Name' (TGTE). A table lists contacts with columns: SELECT, ELEMENT, CONTACT, CRN, SSC, REQUESTED DATE, RESPONSE DATE, LOGGED DATE, and ALLOCATED TO. The first row is selected, showing 'Site Visit' with CRN 20004433. Below the table is a 'Transfer To Queue' button and an 'Exit' button. The footer contains copyright information for Xserve 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.

Section 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 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	20000885-SV2	WM	10/05/2012 15:21:29	20/09/2012 17:46:47	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
<input type="checkbox"/>	Data Clarification	ADD	20004972-DC1		11/09/2012 14:25:02	13/09/2012 14:27:17	Not Allocated

Step 1 – Select the box for the relevant Contact

Step 2 – Click Assign to me

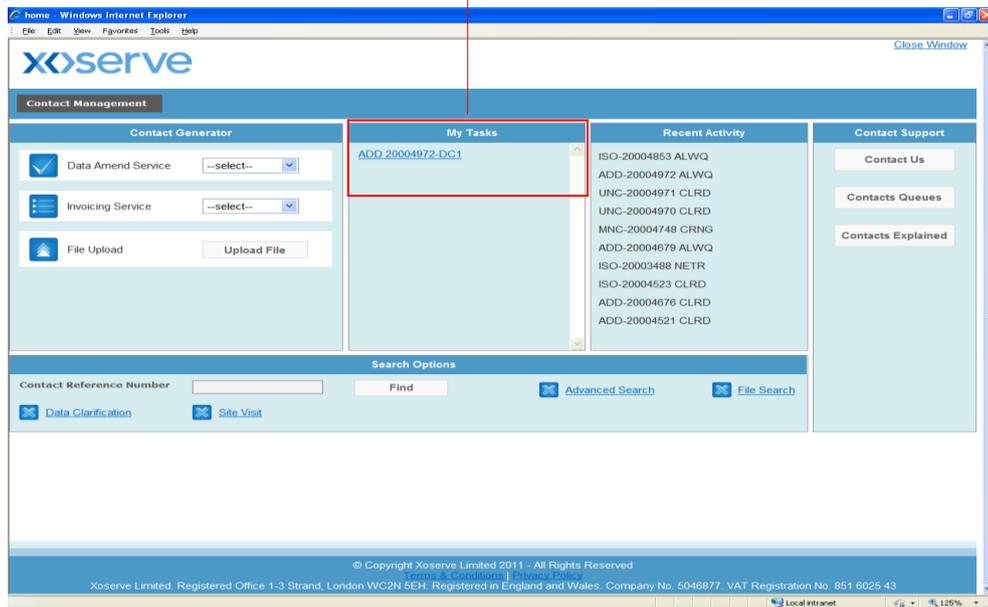


The screenshot shows the Xoserve Contact Management interface. The 'Data Clarification' row in the 'Actions Queue' table is selected, and a mouse cursor is pointing to the 'Assign To Me' button.

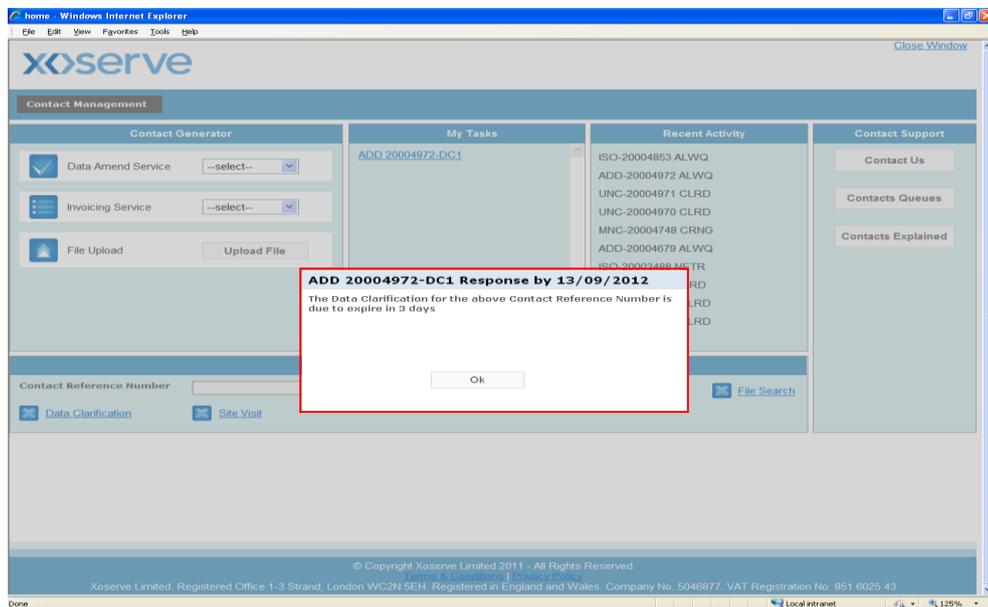
SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	20000885-SV2	WM	10/05/2012 15:21:29	20/09/2012 17:46:47	Not Allocated
<input type="checkbox"/>	Site Visit	ISO	20004857-SV2	EA	10/09/2012 11:17:23	24/09/2012 11:48:22	Not Allocated
<input checked="" type="checkbox"/>	Data Clarification	ADD	20004972-DC1		11/09/2012 14:25:02	13/09/2012 14:27:17	Not Allocated

5.1 Receiving a Data Clarification Request

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.

5.1 Receiving a Data Clarification Request

Contact Management

Contact Management >> Data Clarification Status: ALWQ Queues

TYPE : ADD ORIGINATOR : TGT05 TGTE EMAIL ADDRESS : TGT05@xoserve.com
 CRN : 20004972 SSC : BUS TELEPHONE NO :

DC ID : 20004972-DC1 [View Contact Details >](#)

SITE DETAILS

Building Name	11	Locality	
Building Number		Post Town	KENT
Sub Building Name		Postcode	ME57QR
Principal Street	HALIFAX CLOSE	Delivery Point Alias	
Dependent Street			

SUPPLY POINT DETAILS

Meter Point Reference Number	8898280004	Confirmation Number	177408702
Meter Serial Number		Datalogger Id (AIS)	

Continue Cancel

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

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

Data Clarification Response Configuration - Windows Internet Explorer

Contact Management >> DMQ CRN 20001490 Status: DCFR Queues

TYPE : DMQ ORIGINATOR : BRIT GAS EMAIL ADDRESS : xoserve.businessfocusteam@xoserve.com
 CRN : 20001490 SSC : BUS TELEPHONE NO : 1211112222

DC ID : 20001490-DC

REQUEST	RESPONSE
<p>Dispatch Date 10-09-2012</p> <p>I am unable to process your contact for the following reason (Access to the property could not be gained)</p> <p>Please provide the following information in order for me to proceed (Site contact name and telephone number)</p> <p>Additional Information</p> <p>Request by NATGRID02</p> <p>Resolved Cancel</p>	<p>Due Date 13-09-2012 Respond Date 10-09-2012</p> <p>Mr Smith 0121 715 5843</p> <p>Response by BGAS01</p>

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DC ID is an identifier for the original Contact.

Dispatch Date is the day the DC was sent.

'Request by' will identify the Contact Handler.

This is when the DC needs to be responded by.

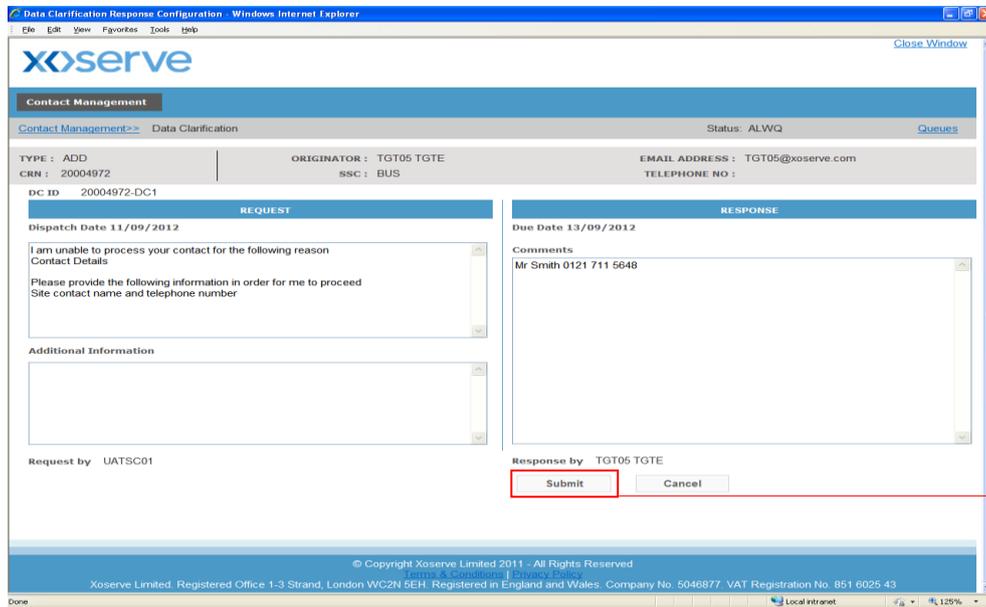


Up to two DC's can be sent per Contact. These will show as DC1 and DC2 on the system.

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.



The screenshot shows a web browser window titled "Data Clarification Response Configuration - Windows Internet Explorer". The page header features the Xoserve logo and navigation links for "Contact Management" and "Data Clarification". The status is "ALWQ" with a "Queues" link. The form contains the following fields and sections:

- TYPE :** ADD
- ORIGINATOR :** TGT05 TGTE
- EMAIL ADDRESS :** TGT05@xoserve.com
- CRN :** 20004972
- SSC :** BUS
- TELEPHONE NO :**
- DC ID :** 20004972-DC1
- REQUEST Section:**
 - Dispatch Date:** 11/09/2012
 - Text:** "I am unable to process your contact for the following reason
Contact Details
Please provide the following information in order for me to proceed
Site contact name and telephone number"
 - Additional Information:** (Empty text area)
 - Request by:** UATSC01
- RESPONSE Section:**
 - Due Date:** 13/09/2012
 - Comments:** "Mr Smith 0121 711 5848"
 - Response by:** TGT05 TGTE
 - Buttons:** "Submit" (highlighted with a red box) and "Cancel"

At the bottom, there is a copyright notice: "© Copyright Xoserve Limited 2011 - All Rights Reserved" and contact information for Xoserve Limited. A mouse cursor is visible on the right side of the page.

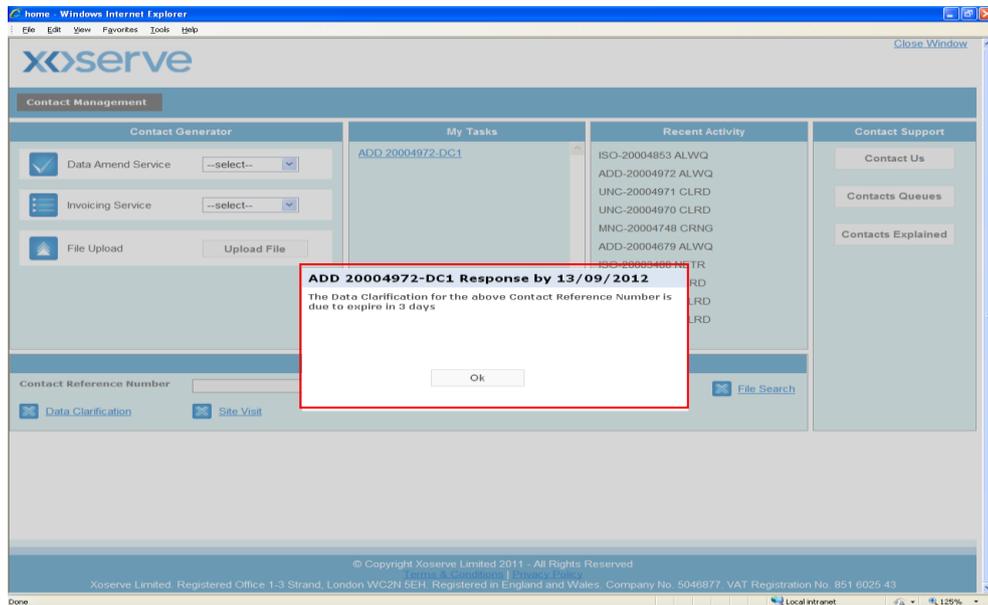
The DC will be directed back to the Contact Handler at Xoserve.

 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.



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 Actions Queue interface. At the top, there are navigation tabs: "My Tasks", "Contacts Queue", and "Actions Queue". Below the tabs, there are search filters for "Contact code" (set to "All"), "LDZ" (set to "All"), and "Type" (set to "All"). A "Refine" button is located to the right of these filters. The main content area 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	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

Below the table, there are two buttons: "Assign To Me" and "Exit". At the bottom of the page, there is a footer with copyright information: "© Copyright Xoserve Limited 2011 - All Rights Reserved".

Step 1 – Select the box for the relevant Contact

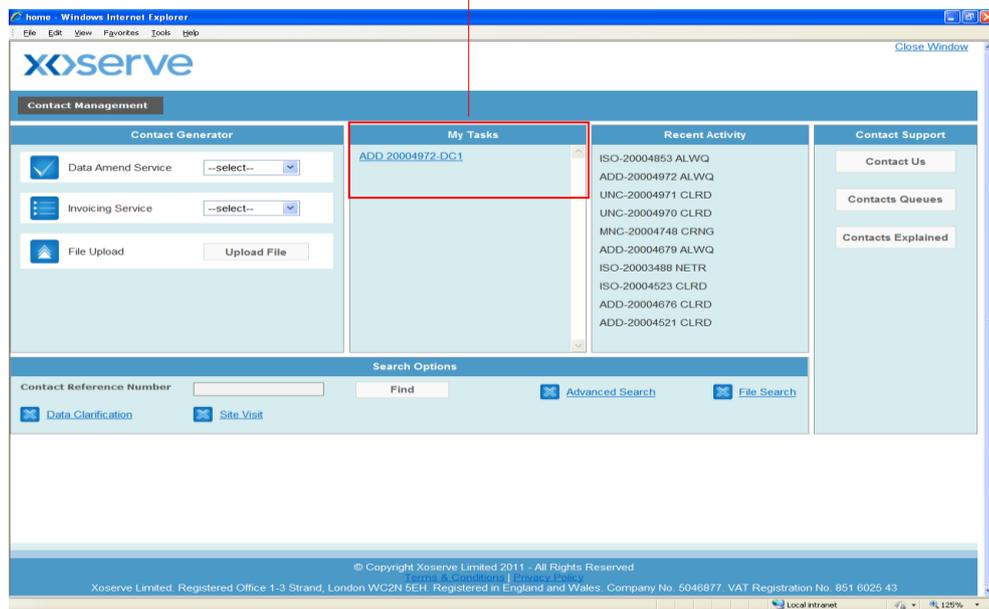
Step 2 – Click Assign to me



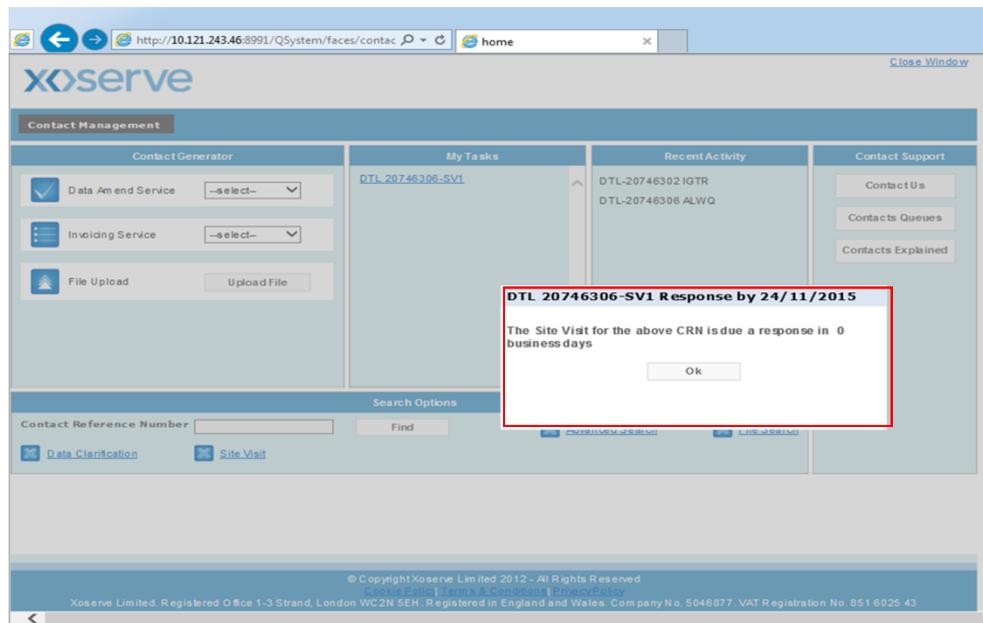
This screenshot is identical to the one above, but with a red rectangular box highlighting the "Assign To Me" button. A computer mouse icon is positioned to the left of the box, with a red line pointing from the mouse button to the "Assign To Me" button. The table data and other interface elements remain the same as in the previous screenshot.

5.4 Receiving a Site Visit Request

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.

5.4 Receiving a Site Visit Request

The screenshot shows a web browser window titled 'Site Visit - Windows Internet Explorer'. The page displays the Xoserve logo and a 'Contact Management' section. The contact details for ISO CRN 20004853 are shown, including SV ID 20004853-SV1, Site Visit Priority SV-Urgent, Network - LDZ, and TGT - EA. The 'SITE DETAILS' section includes Building Name, Building Number (2), Locality, Sub Building Name, Post Town (HITCHIN), Principal Street (TILEHOUSE STREET), Postcode (SG52DW), and Dependent Street. The 'SUPPLY POINT DETAILS' section includes Site Contact Name, Availability Information (test case 2 urgent SV), Site Contact Number, Access Instructions, MPRN (20875604), and Datalogger (AIS) Number. A 'Continue' button is highlighted with a red box, and a mouse cursor is pointing to it.

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.

The screenshot shows the Xoserve website with the Site Visit Request form. The 'REQUEST' section is on the left, and the 'RESPONSE' section is on the right. The 'REQUEST' section includes fields for METER, MPRN, Meter Serial Number, Model, Manufacturer, Year of Manufacture, No. of Dials, Meter Read, Read Date, Meter Location, Meter Status, Meter Link Code, Free Standing, CORRECTOR, Corrector Serial Number, Corrected Read, Uncorrected Read, Request Reason, and Additional Information. The 'RESPONSE' section includes fields for METER, MPRN, Meter Serial Number, Model, Manufacturer, Year of Manufacture, Corrector Serial Number, No. of Dials, Meter Read, Read Date, Meter Location, Meter Status, Meter Link Code, CORRECTOR, Corrector Serial Number, Corrected Read, Uncorrected Read, Response Reason, and Additional Information. There are also fields for Visit1, Visit2, Visit3, and an 'Add MPRN' button. The 'Request By' field is highlighted with a red box. Annotations with red boxes and arrows point to the 'SV ID' field (labeled 'SV ID is an identifier for the original Contact.'), the 'Priority' field (labeled 'Priority is stating the urgency of the SV.'), and the 'Request By' field (labeled ''Request by' will identify the Xoserve Contact').



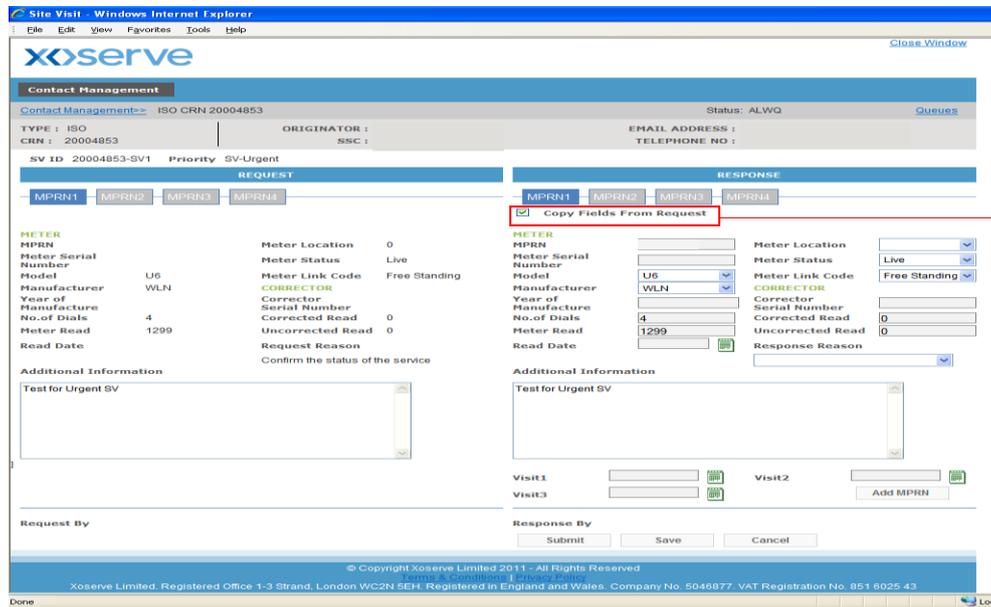
There is no limit to the number of SV's that can be sent per Contact.



Please note more than one MPRN can be included in the request section from Xoserve. The MPRN's 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.

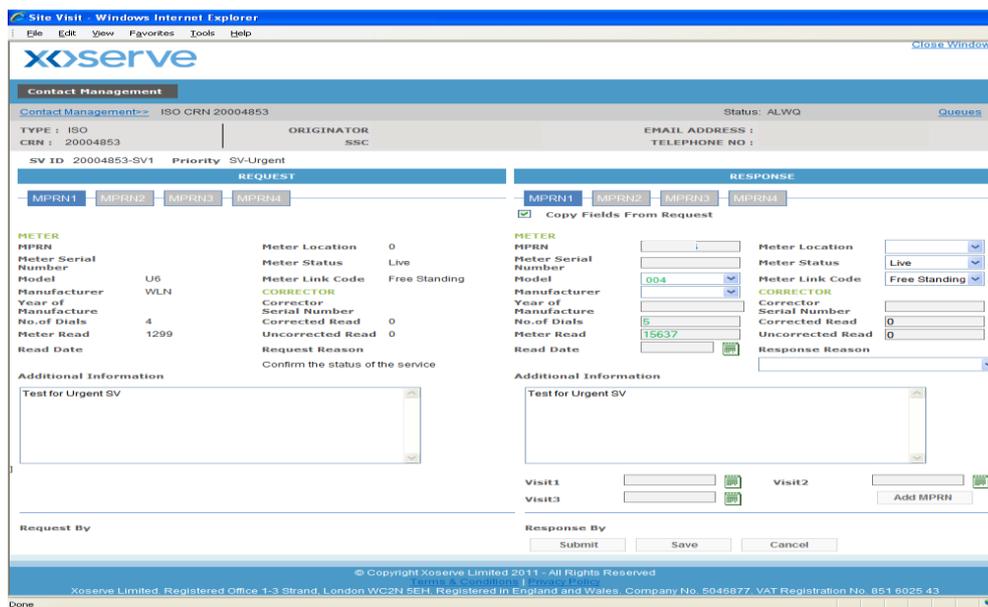


The screenshot shows the Xoserve 'Site Visit' response screen. The 'REQUEST' section on the left contains the following data:

METER	MPRN	Meter Location	0
MPRN		Meter Status	Live
Meter Serial Number		Meter Link Code	Free Standing
Model	U6	CORRECTOR	
Manufacturer	WLN	Year of Manufacture	
Year of Manufacture		No. of Dials	4
No. of Dials	4	Meter Read	1299
Meter Read	1299	Corrected Read	0
Read Date		Uncorrected Read	0
		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, but the 'Model' field is 'U6' and the 'Manufacturer' is 'WLN'. The 'Request Reason' field is empty. The 'Response Reason' field is also empty. The 'Request By' and 'Response By' fields are empty. The 'Submit', 'Save', and 'Cancel' buttons are visible at the bottom.

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 screen with manual changes in the 'RESPONSE' section. The 'Copy Fields From Request' checkbox is checked. The data in the 'RESPONSE' section is as follows:

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

The 'Request Reason' field is empty. The 'Response Reason' field is also empty. The 'Request By' and 'Response By' fields are empty. The 'Submit', 'Save', and 'Cancel' buttons are visible at the bottom.

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

5.5 Responding to a Site Visit Request



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 'Site Visit' form. The top navigation bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The main header displays 'Xoserve' and 'Contact Management'. Below this, there are tabs for 'MPRN1', 'MPRN2', 'MPRN3', and 'MPRN4'. The 'REQUEST' section is active, showing fields for 'METER' (MPRN, Meter Serial Number, Model, Manufacturer, Year of Manufacture, No. of Dials, Meter Read, Read Date) and 'METER' (Meter Location, Meter Status, Meter Link Code, CORRECTOR, Serial Number, Corrected Read, Uncorrected Read, Request Reason). The 'RESPONSE' section is also active, showing similar fields for 'METER' and 'METER'. There are 'Additional Information' boxes for both sections. At the bottom, there are 'Request By' and 'Response By' fields, and a 'Submit' button highlighted with a red box. A mouse cursor is visible on the right side of the form.



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

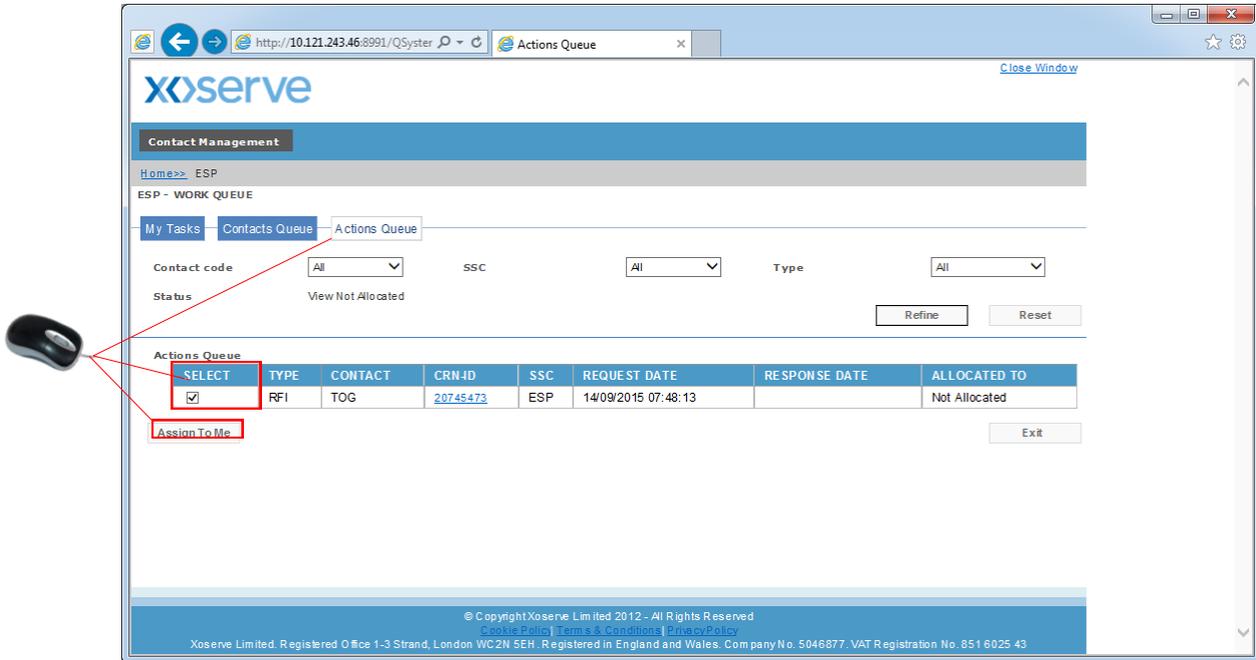


Your name is populated in the 'Response by' field.

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, Network or iGT, 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'

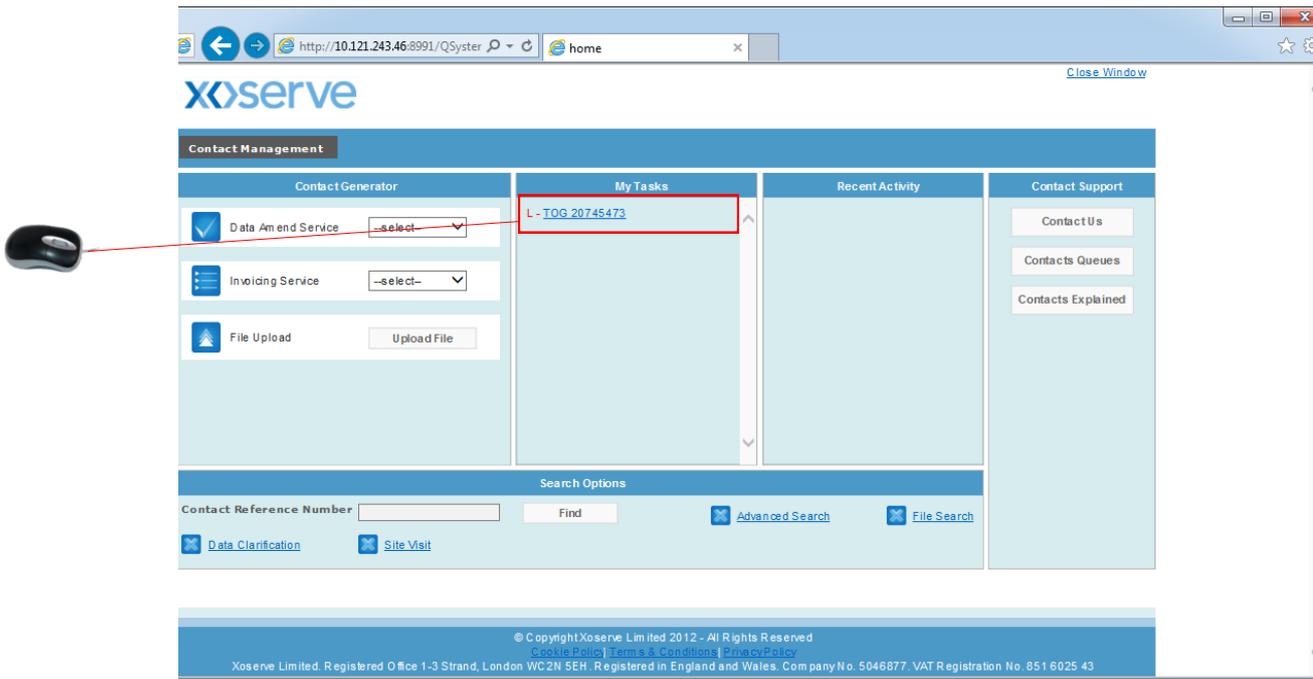


The screenshot shows the Xoserve Contact Management interface. The 'Actions Queue' table is visible, with the following data:

SELECT	TYPE	CONTACT	CRN ID	SSC	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input checked="" type="checkbox"/>	RFI	TOG	20745473	ESP	14/09/2015 07:48:13		Not Allocated

The 'Assign To Me' button is highlighted in red, and a mouse cursor is positioned over it. The 'SELECT' checkbox is also highlighted in red.

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



The screenshot shows the Xoserve Contact Management interface. The 'My Tasks' section is visible, with the following data:

Contact Generator	My Tasks	Recent Activity	Contact Support
<input checked="" type="checkbox"/> Data An end Service <input type="text" value="--select--"/>	L - TOG 20745473		Contact Us
<input type="checkbox"/> Invoicing Service <input type="text" value="--select--"/>			Contacts Queues
<input type="checkbox"/> File Upload <input type="button" value="Upload File"/>			Contacts Explained

The 'L - TOG 20745473' link is highlighted in red, and a mouse cursor is positioned over it.

5.6 Receiving an RFI request (Theft of Gas only)

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

The screenshot shows a web browser window with the URL <http://10.121.243.46:8991/QSystem/faces/pages/>. The page title is "Xoserve" and the main heading is "Contact Management". The status is "RFII" and the TOG CRN is "20745473".

Fields include:

- TOG Investigation Outcome * (dropdown: --Select--)
- Type of Theft * (dropdown: --Select--)
- Adjustment Start Date (text input)
- Adjustment End Date (text input)
- Total Volume (text input and dropdown: --Select--)
- Meter Model (text input)
- Meter Make (text input)
- Meter Reading (text input)
- Year of Manufacture (text input)
- Name of Informant (text input)
- Informant Phone Number (text input)
- Name of Engineer who attended * (text input: Vineeth)
- Engineer Phone Number * (text input: 123456)
- Is Photographic evidence available? * (radio buttons: Yes, No)
- Have Police been informed? * (radio buttons: Yes, No)
- Police Officer's Name (text input)
- Police Officer's Phone Number (text input)
- Crime Reference Number (text input)
- Police Station (text input)

Buttons: "Submit", "Cancel".

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

The screenshot shows a web browser window with the title "Contact Details - Windows Internet Explorer". The page title is "Xoserve" and the main heading is "Contact Management". The status is "RFI" and the TOG CRN is "2".

Fields include:

- Meter Point Reference Number (text input)
- Meter Serial Number (text input)
- Building Number/Name (text input: DFDSFD)
- Delivery Point Alias (text input)
- Sub Building Name (text input)
- Principal Street Name (text input: FDFSDF)
- Dependent Street (text input)
- Dependent Locality (text input)
- Post Town (text input: FSDDSF)
- Postcode (text input: B90 2WW)
- Required Emergency Job? (radio buttons: Yes, No)
- Job Number (text input: adsdads)
- Type of Theft (Allegation) (dropdown: Tampered Meter Index)
- TOG Allegation Description (text area)

Buttons: "Ok".

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5.7 Responding to 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

Adjustment Start Date

Adjustment End Date

Total Volume

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

The screenshot shows a web browser window titled "TOG - Windows Internet Explorer" displaying the "Xoserve Contact Management" interface. The page includes a navigation bar with "Home" and "TOG - RFI" links, and a status bar with "Status:" and "Queues" links. The main form area contains several sections:

- TOG Investigation Outcome ***: A dropdown menu with options: "--Select--", "Invalid TOG", "Valid TOG-Not Pursuing", and "Valid TOG".
- Type of Theft**: A text input field.
- TOG Start Date**: A date input field.
- TOG End Date**: A date input field.
- Estimated Calculation of Gas [kWh]**: A text input field.
- Meter Model**: A text input field.
- Meter Make**: A text input field.
- Meter Reading**: A text input field.
- Year of Manufacture**: A text input field.
- Engineer's Report**: A large text area for entering details.
- Name of Informant**: A text input field.
- Informant Phone Number**: A text input field.
- Name of Engineer who attended**: A text input field.
- Engineer Phone Number**: A text input field.
- Is Photographic evidence available?**: Radio buttons for "Yes" and "No".
- Have Police been informed?**: Radio buttons for "Yes" and "No".
- Police Officer's Name**: A text input field.
- Police Officer's Phone Number**: A text input field.
- Crime Reference Number**: A text input field.
- Police Station**: A text input field.

At the bottom of the form, there are "Submit" and "Cancel" buttons. The "Submit" button is highlighted with a red box. A mouse cursor is visible over the "Submit" button, and a keyboard is visible on the right side of the screen.

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5.8 Auto closure of an RFI request (Theft of Gas only)

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.

The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser window. The page title is "SearchViewForm - Windows Internet Explorer". The Xoserve logo is at the top left. The main header is "Contact Management" with a "Close Window" link on the right. Below the header, the contact details are displayed: "Home >> TOG CRN 20168939", "Status: CLRD", and "Queues". The contact information includes: "TYPE : TOG", "CRN : 20168939", "ORIGINATOR :", "SSC :", "EMAIL ADDRESS :", and "TELEPHONE NO :". The "Contact Information" tab is active, showing "TOG Investigation". The contact details are as follows:

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

Other fields include "Required Emergency Job?" with radio buttons for "Yes" and "No", "Job Number", "Type of Theft (Allegation)" with a dropdown menu showing "Tampered Meter Index", and "TOG Allegation Description" with a text area.

The "Resolution Comments" section contains a red-bordered box with the following text:

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.

Buttons for "Ok" and "Challenge Resolution" are visible below the comments.

At the bottom of the page, the copyright information is displayed: "© 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".

Section 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 contact CRN 20003472. The status is CLRD. The contact details include: Meter Point Reference Number 20600, Type of Service Single, Building Number/Name 1, Delivery Point Alias PLOT 1, Principal Street Name PRINSTED LANE, Dependent Street JUBILEE MEWS, Post Town EMSWORTH, and Postcode PO108EA. The Resolution Comments section contains a message: "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. Thank you for raising this contact and I hope it is resolved to your satisfaction." A red box highlights the second paragraph of the message, and a red line points to a text box on the right that says "This part of the resolution message".

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 contact CRN 20004457. The status is CLRD. The contact details include: Meter Point Reference Number UNC, Type of Site Domestic, Type of Service Single, Building Number/Name 64, Delivery Point Alias 64A, Sub Building Name THE DRIVE, Principal Street Name THE DRIVE, Dependent Street THE DRIVE, Dependent Locality POWICK, Post Town POWICK, and Postcode WR24SA. The Resolution Comments section contains a message: "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." A red box highlights the second paragraph of the message, and a red line points to a text box on the right that says "This part tells you why your Contact".

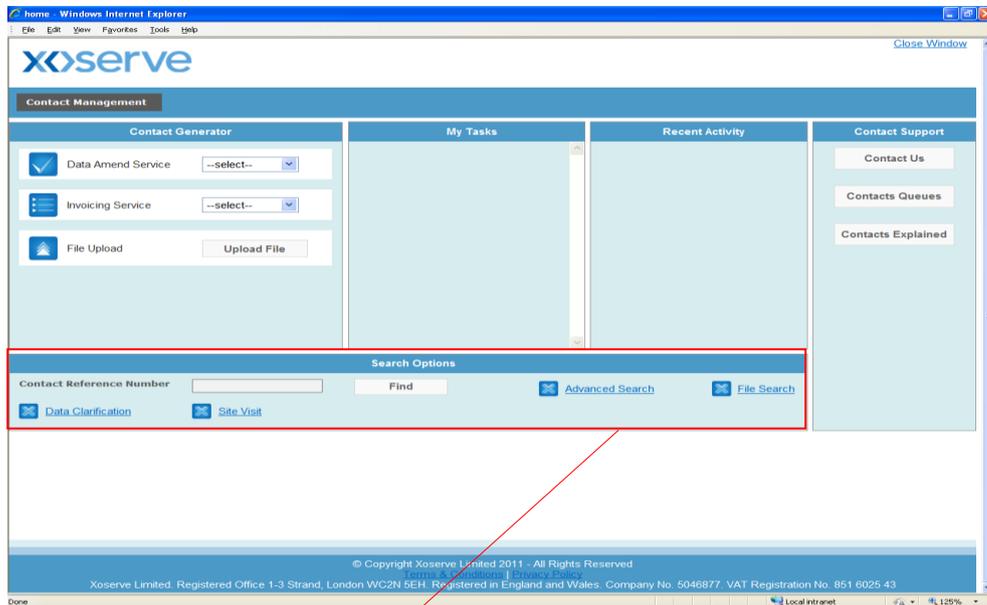
Section 7

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

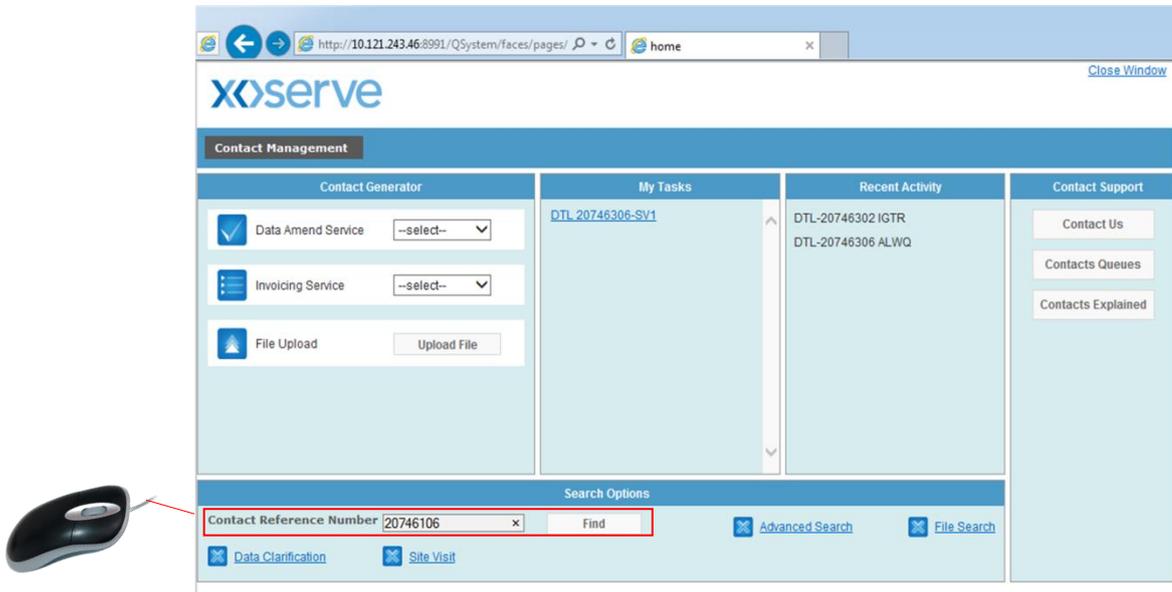
File Search – Locating a file submitted to Xoserve

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.

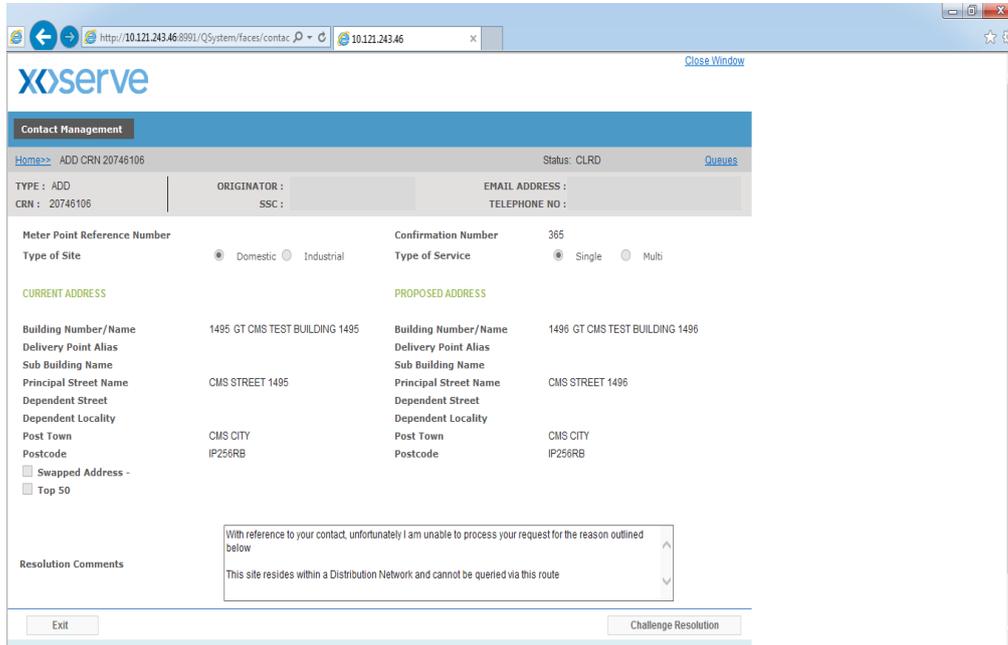
7.2 Basic Search

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



The screenshot shows the Xserve Contact Management interface. The 'Search Options' section is highlighted, showing a search field for 'Contact Reference Number' with the value '20746106' and a 'Find' button. Other search options include 'Advanced Search', 'File Search', 'Data Clarification', and 'Site Visit'. The interface also displays sections for 'Contact Generator', 'My Tasks', 'Recent Activity', and 'Contact Support'.

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



The screenshot shows the Xserve Contact Management interface displaying the details of a contact. The contact details are displayed in a table format, including fields for Meter Point Reference Number, Type of Site, Confirmation Number, and Proposed Address. A resolution comment is also visible.

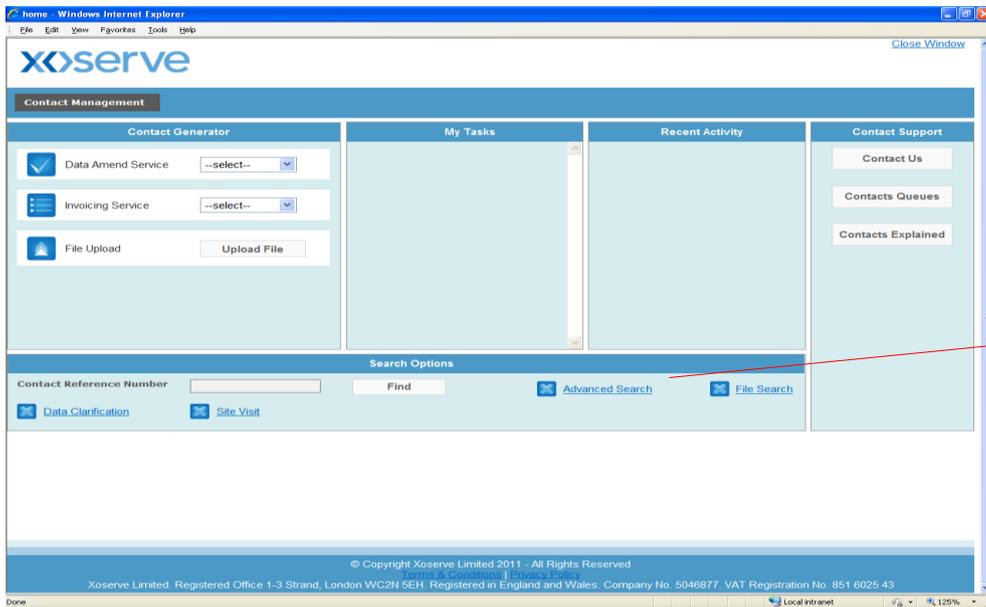
CURRENT ADDRESS		PROPOSED ADDRESS	
Meter Point Reference Number	1495 GT CMS TEST BUILDING 1495	Confirmation Number	365
Type of Site	<input checked="" type="radio"/> Domestic <input type="radio"/> Industrial	Type of Service	<input checked="" type="radio"/> Single <input type="radio"/> Multi
Building Number/Name	1495 GT CMS TEST BUILDING 1495	Building Number/Name	1496 GT CMS TEST BUILDING 1496
Delivery Point Alias		Delivery Point Alias	
Sub Building Name		Sub Building Name	
Principal Street Name	CMS STREET 1495	Principal Street Name	CMS STREET 1496
Dependent Street		Dependent Street	
Dependent Locality		Dependent Locality	
Post Town	CMS CITY	Post Town	CMS CITY
Postcode	IP256RB	Postcode	IP256RB
<input type="checkbox"/> Swapped Address - <input type="checkbox"/> Top 50			

Resolution Comments: With reference to your contact, unfortunately I am unable to process your request for the reason outlined below
This site resides within a Distribution Network and cannot be queried via this route

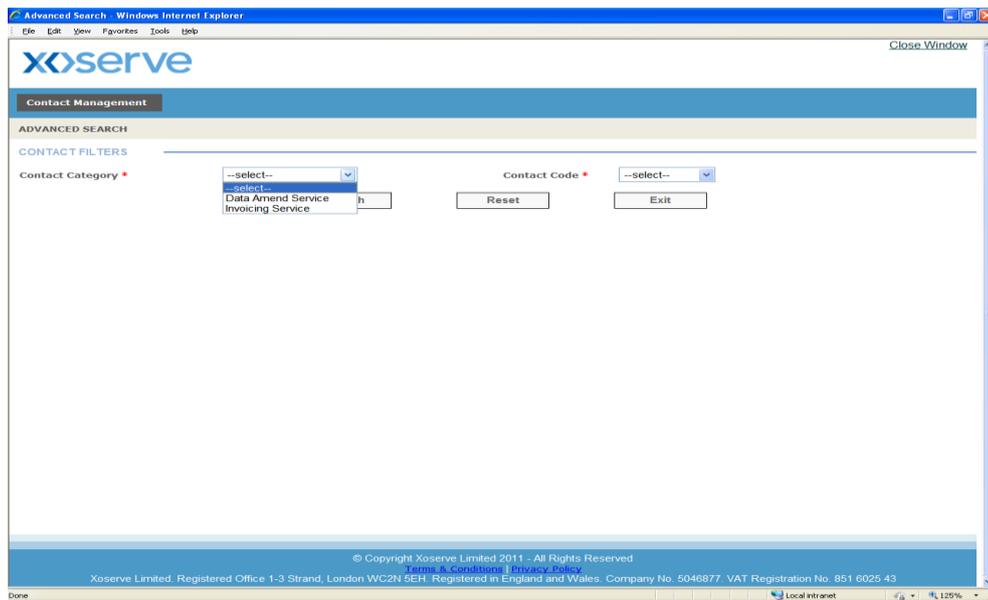
 You can not edit this Contact; it is read only.

7.3 Advanced Search

To retrieve information on Contacts, click Advanced Search.

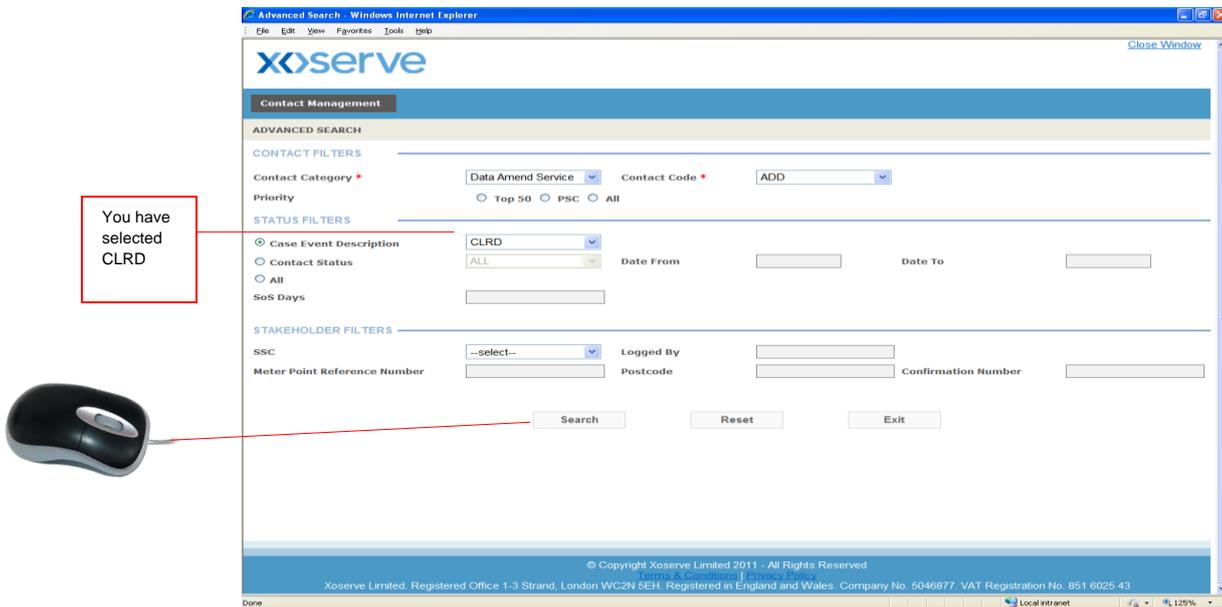


You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.



7.3 Advanced Search

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



You have selected CLRDR

Advanced Search - Windows Internet Explorer

xoserve

Contact Management

ADVANCED SEARCH

CONTACT FILTERS

Contact Category * Contact Code *

Priority Top 50 PSC All

STATUS FILTERS

Case Event Description Date From Date To

Contact Status

All

SoS Days

STAKEHOLDER FILTERS

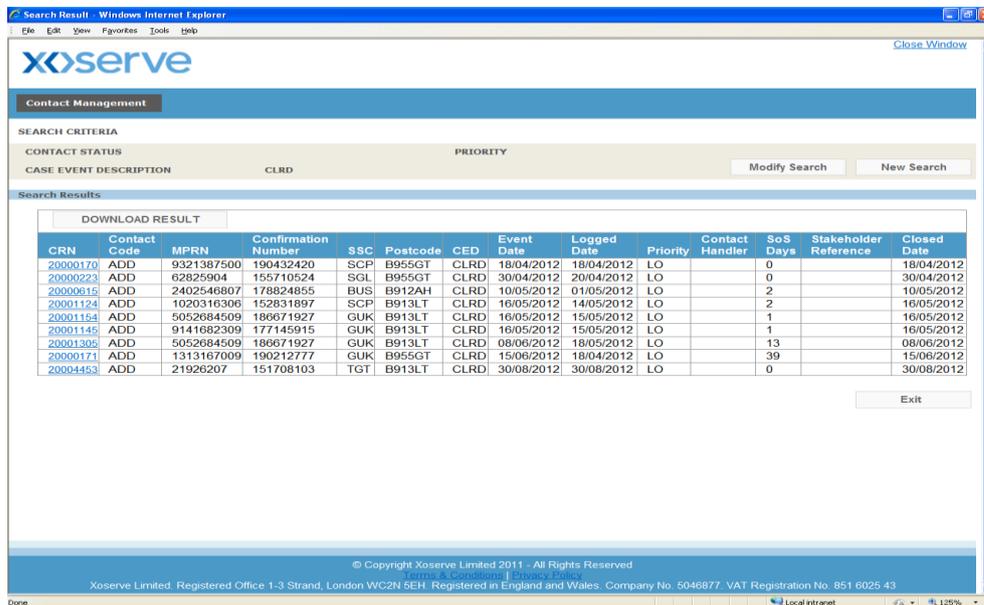
SSC Logged By

Meter Point Reference Number Postcode Confirmation Number

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Enter the necessary data, in the above example you have selected CLRDR 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?



Search Result - Windows Internet Explorer

xoserve

Contact Management

SEARCH CRITERIA

CONTACT STATUS PSC All Top 50

CASE EVENT DESCRIPTION CLRDR Contact Status All

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	9321387500	190432420	SCP	B955GT	CLRDR	18/04/2012	18/04/2012	LO		0		18/04/2012
20000223	ADD	62825904	155710524	SGL	B955GT	CLRDR	30/04/2012	20/04/2012	LO		0		30/04/2012
20000815	ADD	2402546807	178824855	BUS	B912AH	CLRDR	10/05/2012	01/05/2012	LO		2		10/05/2012
20001124	ADD	1020316306	152831897	SCP	B913LT	CLRDR	16/05/2012	14/05/2012	LO		2		16/05/2012
20001154	ADD	5052684509	186671927	GUK	B913LT	CLRDR	16/05/2012	15/05/2012	LO		1		16/05/2012
20001145	ADD	9141682309	177145915	GUK	B913LT	CLRDR	16/05/2012	15/05/2012	LO		1		16/05/2012
20001305	ADD	5052684509	186671927	GUK	B913LT	CLRDR	08/06/2012	18/05/2012	LO		13		08/06/2012
20000171	ADD	1313167009	190212777	GUK	B955GT	CLRDR	15/06/2012	18/04/2012	LO		39		15/06/2012
20004453	ADD	21926207	151708103	TGT	B913LT	CLRDR	30/08/2012	30/08/2012	LO		0		30/08/2012

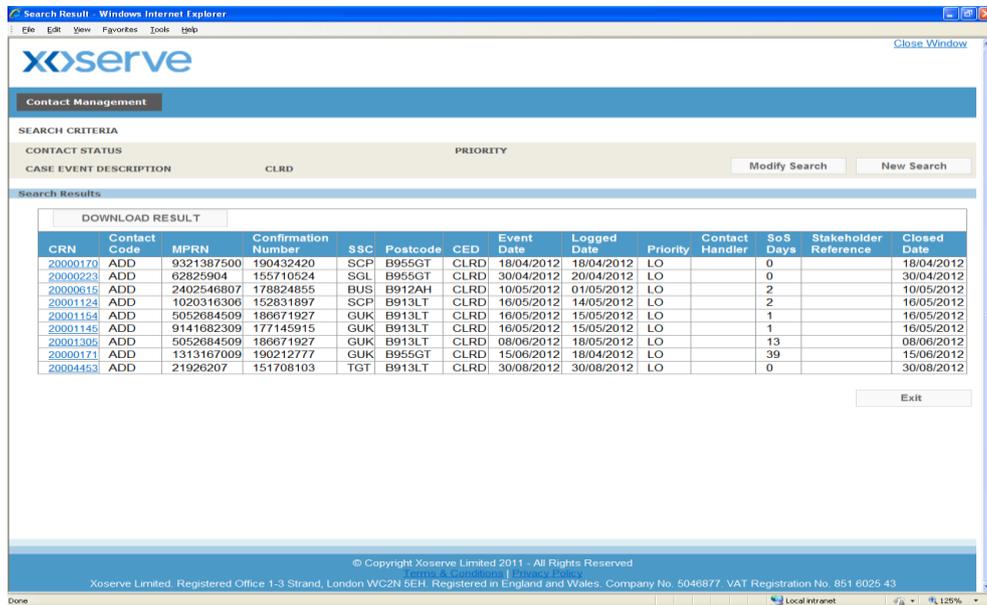
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Select the relevant CRN you require and the Contact will appear showing the Contact details and the resolution for the Contact.

7.3 Advanced Search

Modify Search

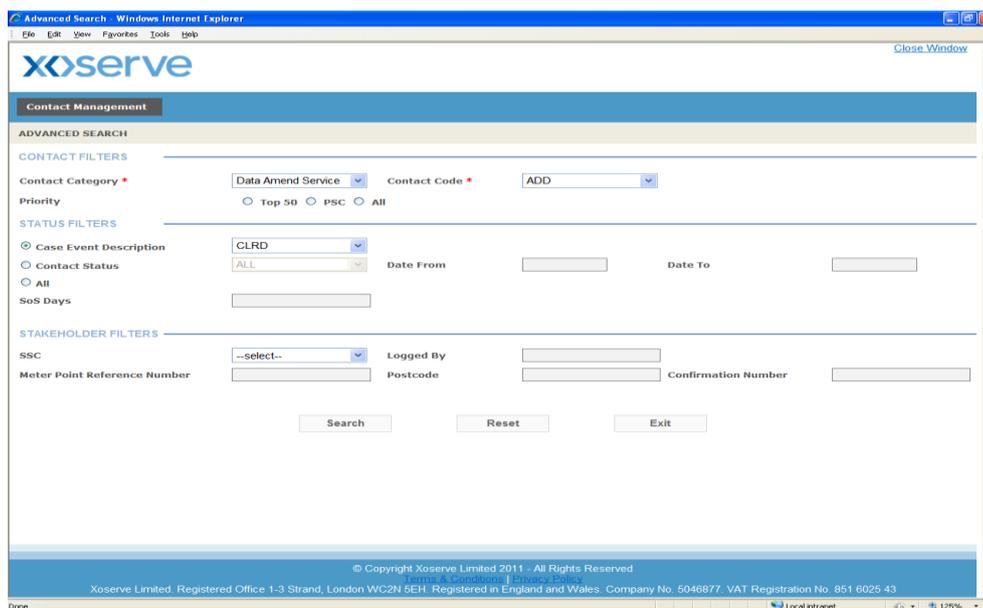
On the results returned through Advanced search there is an option to Modify Search or conduct a New Search.



The screenshot shows the Xoserve Contact Management interface. At the top, there is a navigation bar with the Xoserve logo and a 'Close Window' button. Below this is a 'Contact Management' section with a 'SEARCH CRITERIA' area. The search criteria are set to 'CONTACT STATUS' and 'PRIORITY'. There are buttons for 'Modify Search' and 'New Search'. Below the search criteria is a 'Search Results' section with a 'DOWNLOAD RESULT' button. The main area displays a table of search results with the following columns: CRN, Contact Code, MPRN, Confirmation Number, SSC, Postcode, CED, Event Date, Logged Date, Priority, Contact Handler, SoS Days, Stakeholder Reference, and Closed Date. The table contains 12 rows of data. At the bottom of the table is an 'Exit' button. The footer of the page contains copyright information for Xoserve Limited 2011.

CRN	Contact Code	MPRN	Confirmation Number	SSC	Postcode	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date
20000170	ADD	9321387500	190432420	SCP	B955GT	CLRD	18/04/2012	18/04/2012	LO		0		18/04/2012
20000223	ADD	62825904	155710524	SGL	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

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

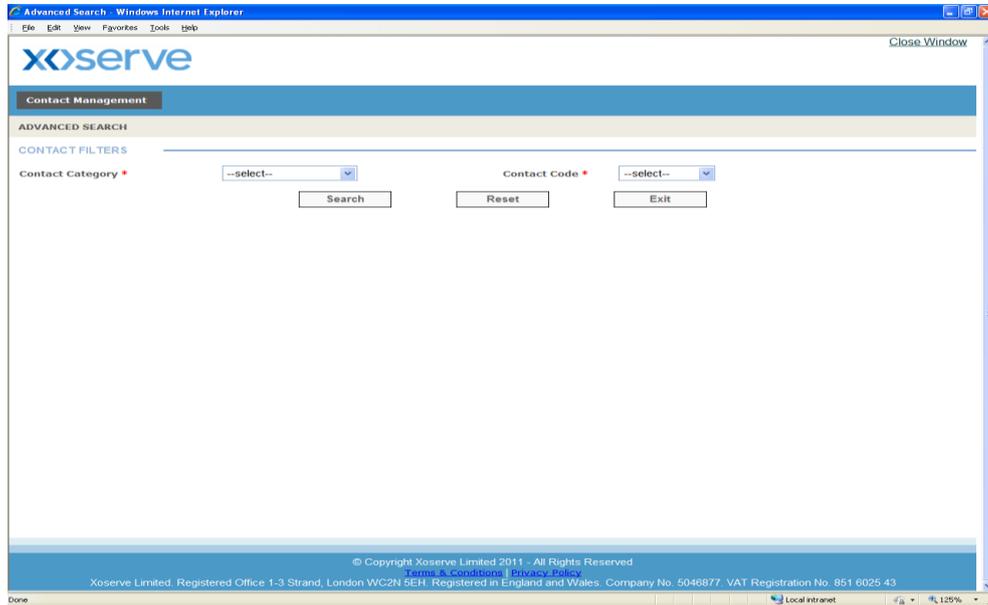


The screenshot shows the Xoserve Advanced Search interface. It features a 'Contact Management' section with an 'ADVANCED SEARCH' area. The search criteria are set to 'CONTACT FILTERS'. The 'Contact Category' is set to 'Data Amend Service' and 'Contact Code' is set to 'ADD'. The 'Priority' is set to 'Top 50'. The 'STATUS FILTERS' section is set to 'Case Event Description' with 'CLRD' selected. The 'STAKEHOLDER FILTERS' section is set to 'SSC' with '--select--' selected. There are input fields for 'Logged By', 'Meter Point Reference Number', 'Postcode', and 'Confirmation Number'. At the bottom of the search area are buttons for 'Search', 'Reset', and 'Exit'. The footer of the page contains copyright information for Xoserve Limited 2011.

7.3 Advanced Search

New Search

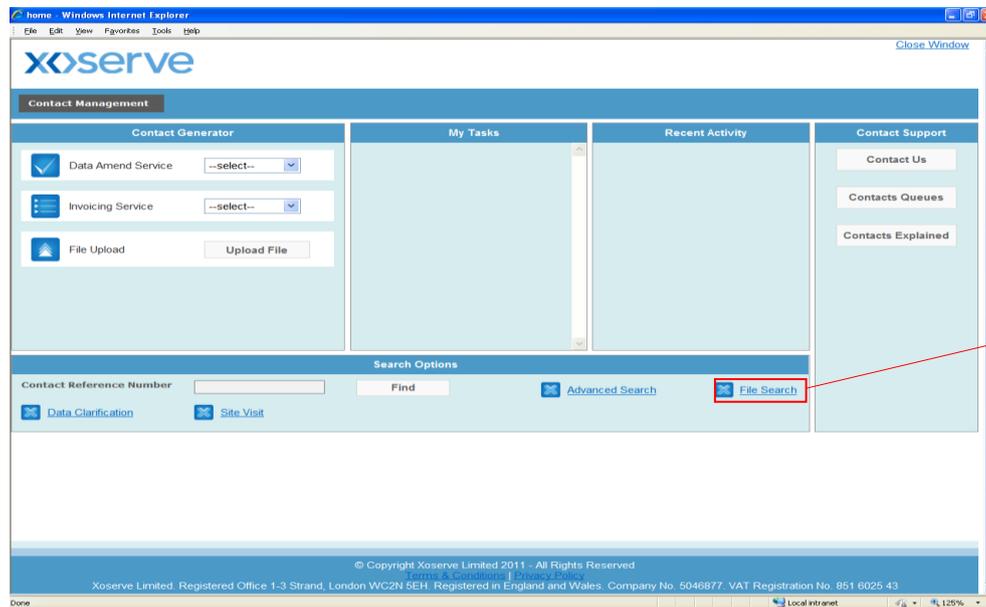
New Search takes you to the original search screen to complete a brand new search with new data.



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

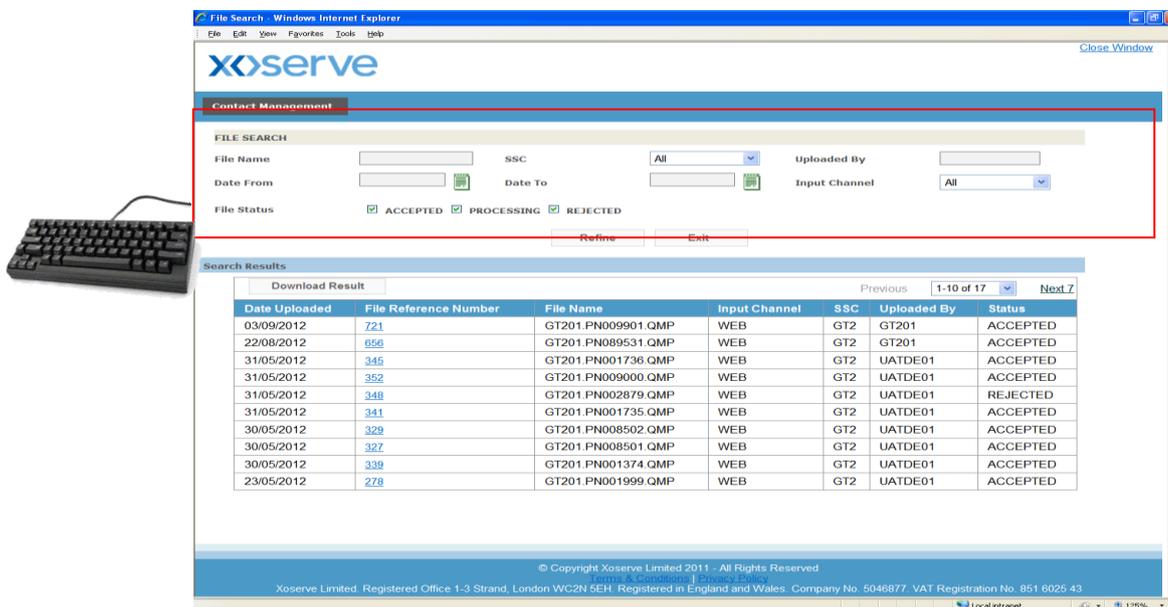
7.4 File Search

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.

7.3 File Search

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 Xoserve File Search interface. The 'File Status' filter is set to 'ACCEPTED', 'PROCESSING', and 'REJECTED'. The search results table shows 17 records, all with a status of 'ACCEPTED'.

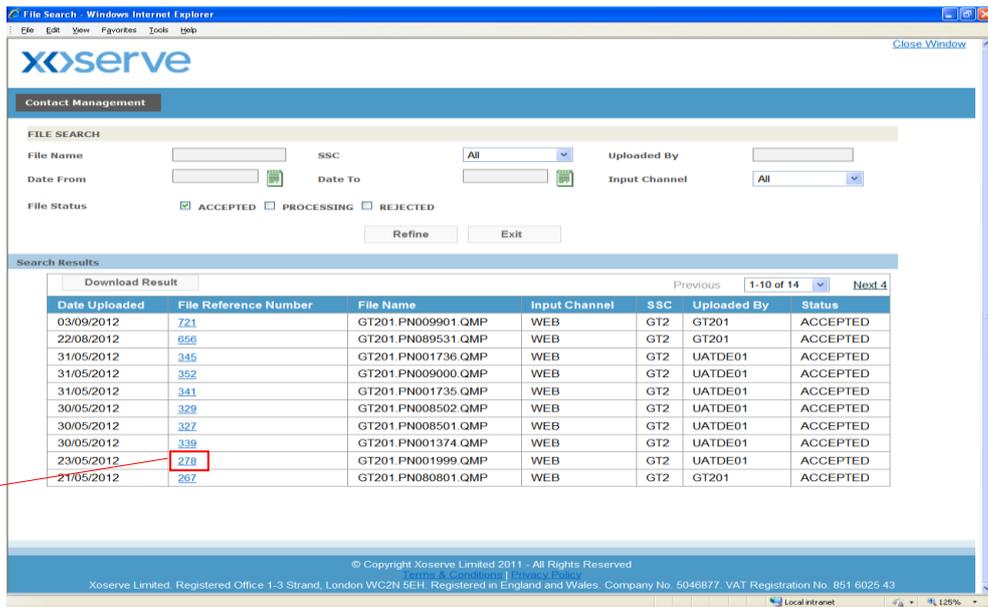
Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
03/09/2012	721	GT201.PN009901.QMP	WEB	GT2	GT201	ACCEPTED
22/08/2012	656	GT201.PN089531.QMP	WEB	GT2	GT201	ACCEPTED
31/05/2012	345	GT201.PN001736.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	352	GT201.PN009000.QMP	WEB	GT2	UATDE01	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.

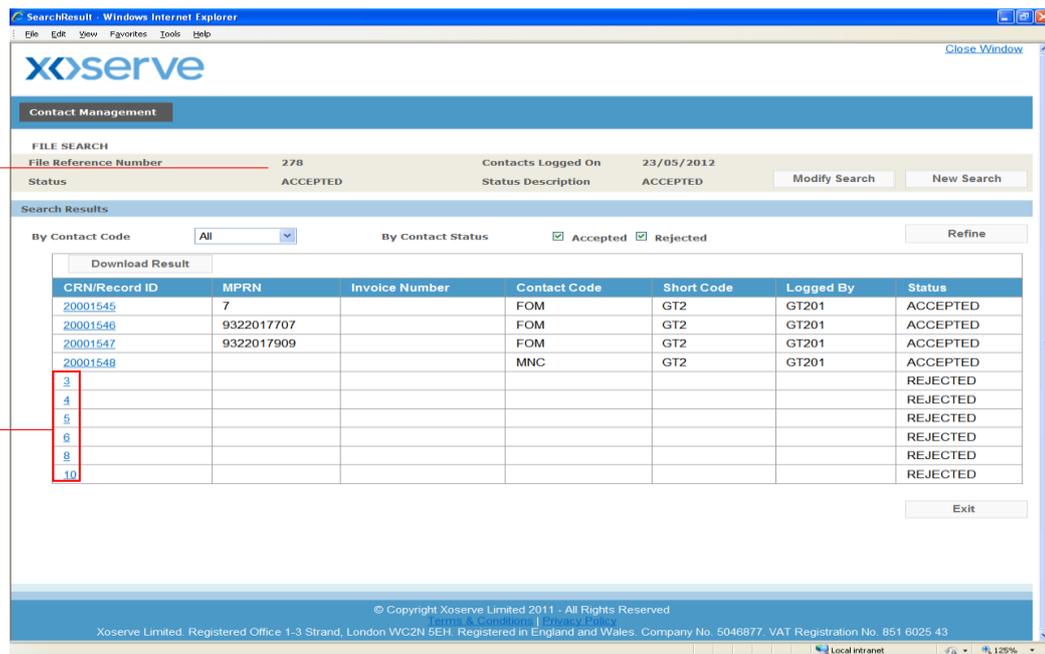
7.4 File Search



The screenshot shows the Xoserve File Search interface. The search criteria are: File Name (empty), SSC (All), Date From (empty), Date To (empty), Input Channel (All), and File Status (ACCEPTED, PROCESSING, REJECTED). The search results table is as follows:

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	345	GT201.PN001736.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	352	GT201.PN009000.QMP	WEB	GT2	UATDE01	ACCEPTED
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
21/05/2012	267	GT201.PN080801.QMP	WEB	GT2	GT201	ACCEPTED

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



The screenshot shows the Xoserve SearchResult interface. The search criteria are: File Reference Number (278), Status (ACCEPTED), and Contacts Logged On (23/05/2012). The search results table is as follows:

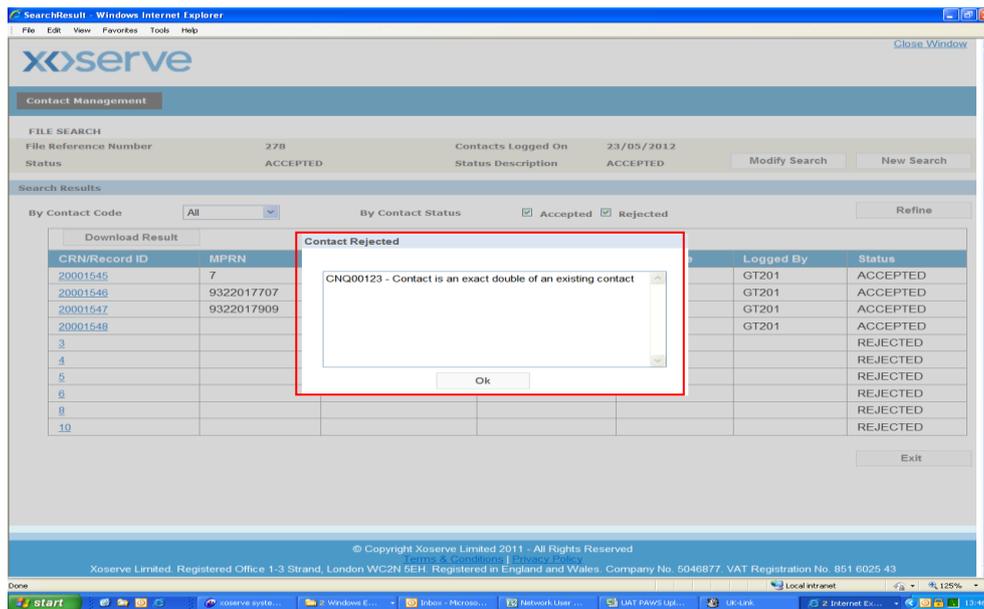
CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20001545	7		FOM	GT2	GT201	ACCEPTED
20001546	9322017707		FOM	GT2	GT201	ACCEPTED
20001547	9322017909		FOM	GT2	GT201	ACCEPTED
20001548			MNC	GT2	GT201	ACCEPTED
3						REJECTED
4						REJECTED
5						REJECTED
6						REJECTED
8						REJECTED
10						REJECTED

File Reference selected.

This number relates to the row that this record features in your 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.

7.4 File Search



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

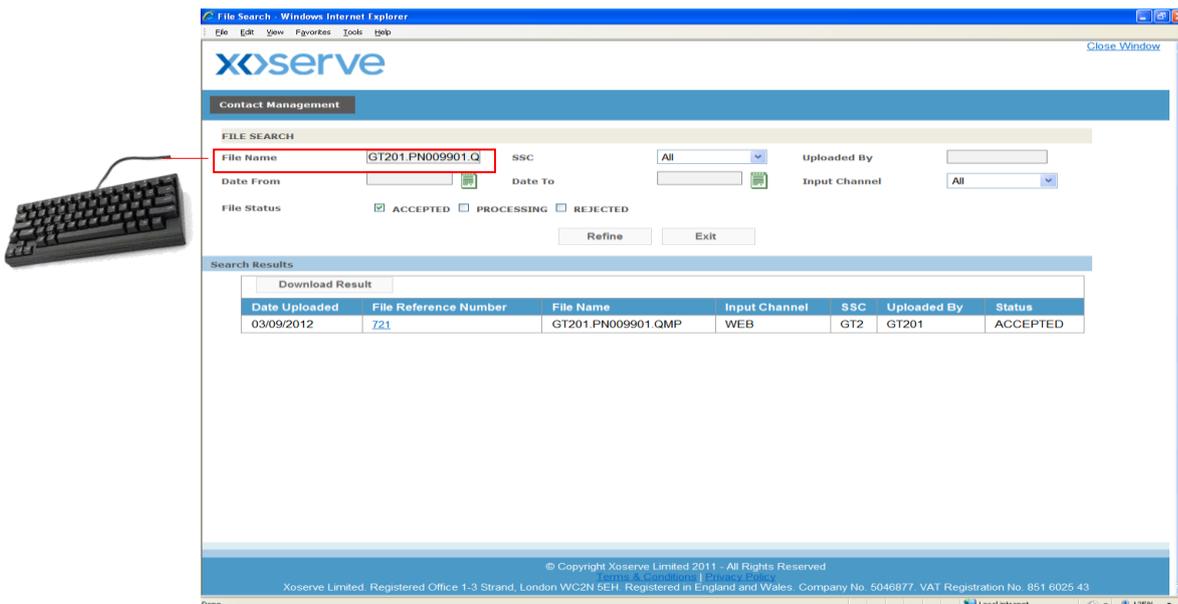
To complete a search using a specific file name...

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows.

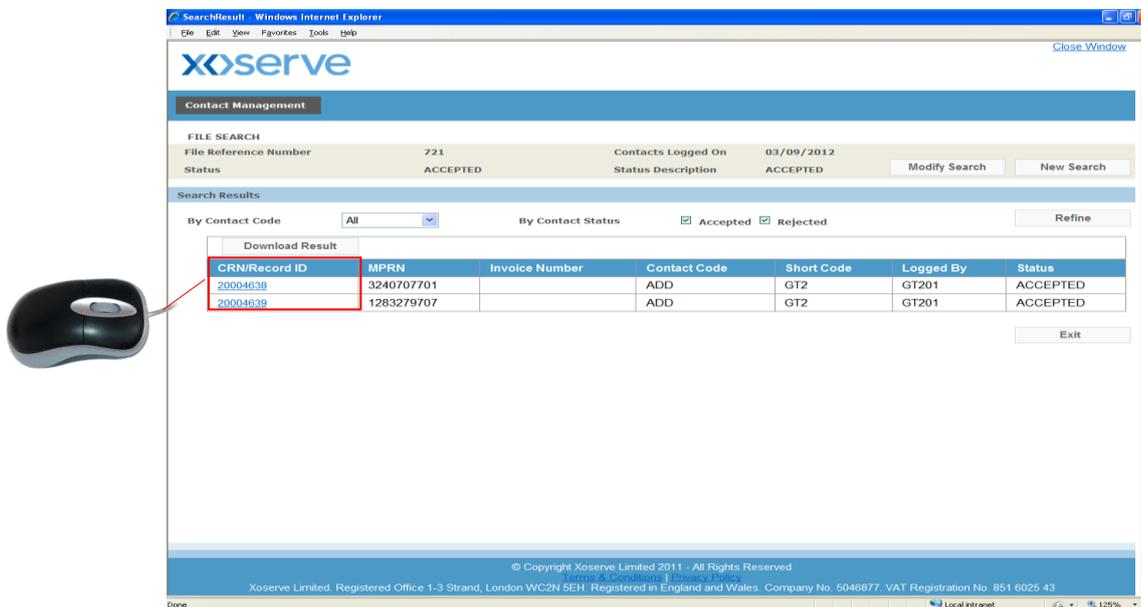


One of the File Status's must be selected in order for the search to bring back the appropriate results.

7.4 File Search

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

To drill down further, click on a specific Contact.



SearchResult - Windows Internet Explorer

xoserve

Contact Management

FILE SEARCH

File Reference Number: 721 Contacts Logged On: 03/09/2012

Status: ACCEPTED Status Description: ACCEPTED [Modify Search](#) [New Search](#)

Search Results

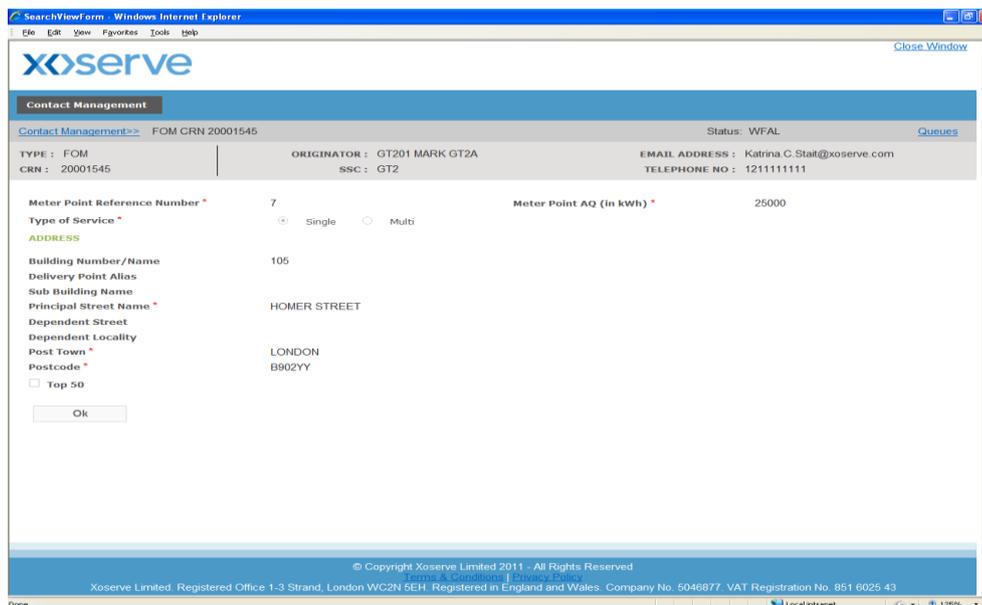
By Contact Code: All By Contact Status: Accepted Rejected [Refine](#)

Download Result	CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
	20004638	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.Stait@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](#)

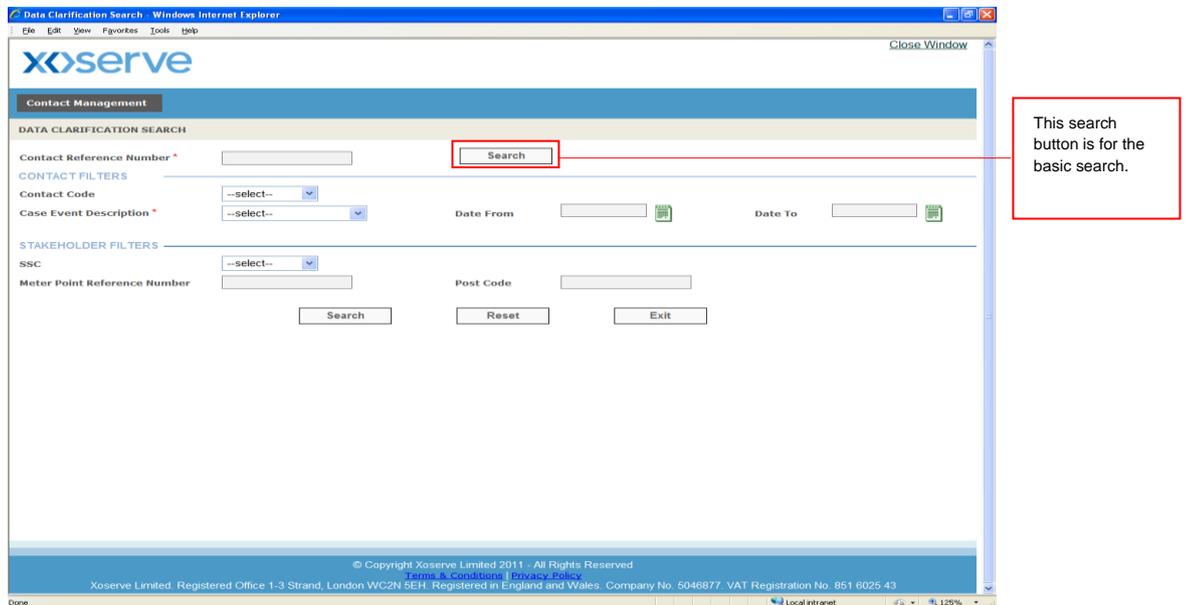
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7.5 Data Clarification Search

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.



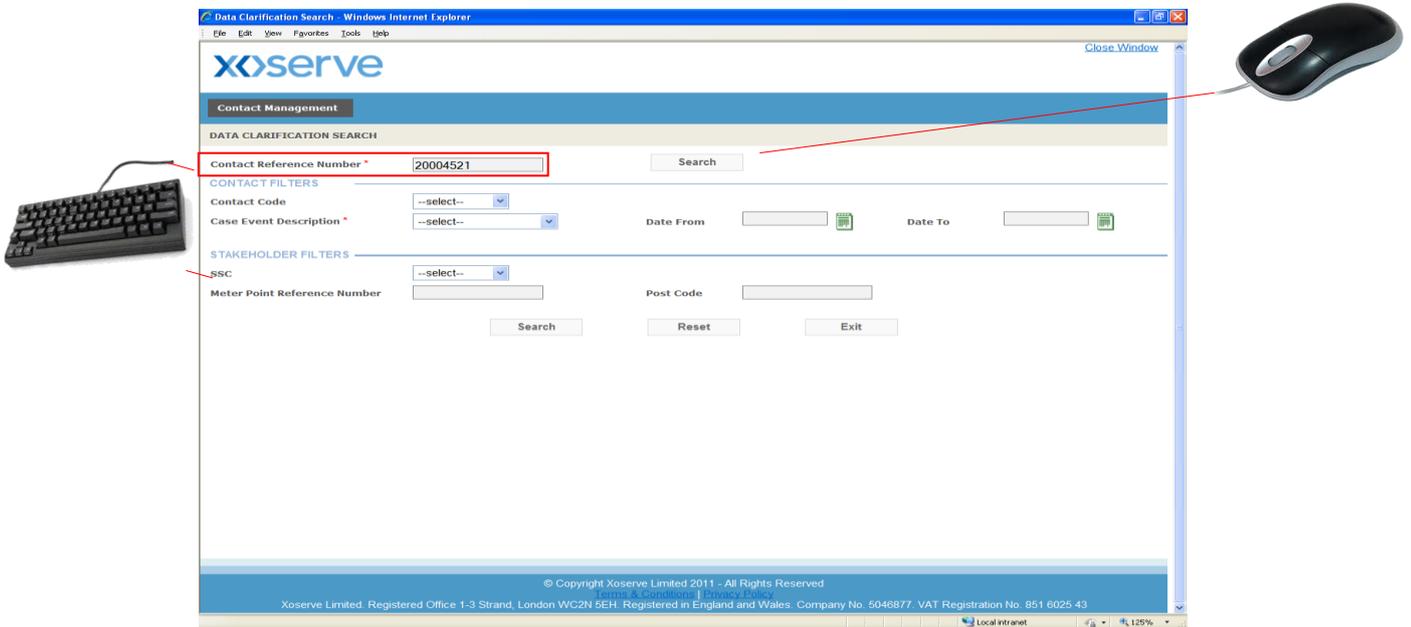
Search can be completed via CRN or various Filters. A CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

7.5 Data Clarification Search

Basic Search

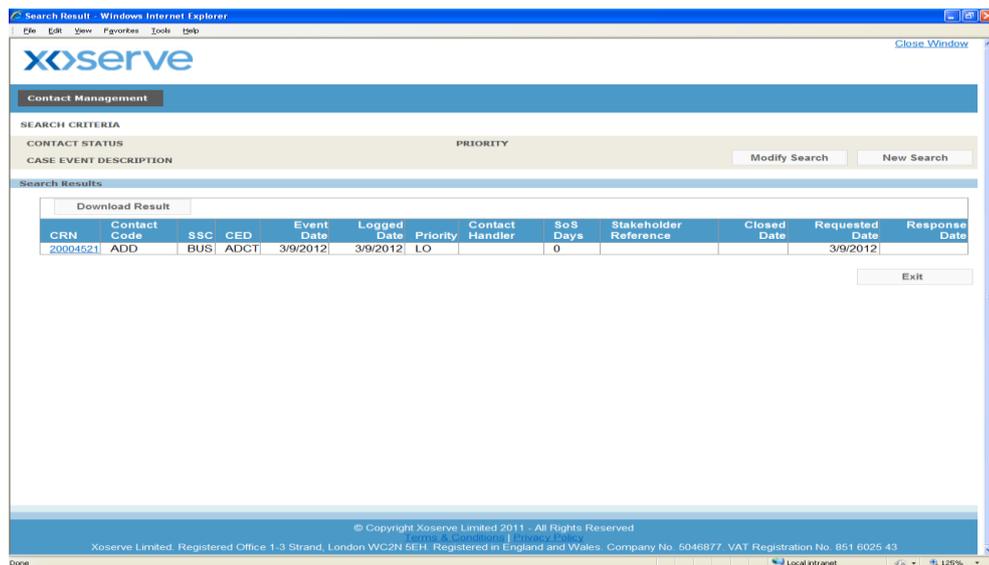
Step 1 – Enter your CRN into the Contact Reference Number field

Step 2 – Click Search.



The screenshot shows the Xoserve Data Clarification Search interface. The 'Contact Reference Number' field is highlighted with a red box and contains the value '20004521'. A red arrow points from a mouse cursor to the 'Search' button. Another red arrow points from a keyboard to the 'Contact Reference Number' field. The interface includes sections for 'CONTACT FILTERS' and 'STAKEHOLDER FILTERS'.

The results will be displayed as follows....



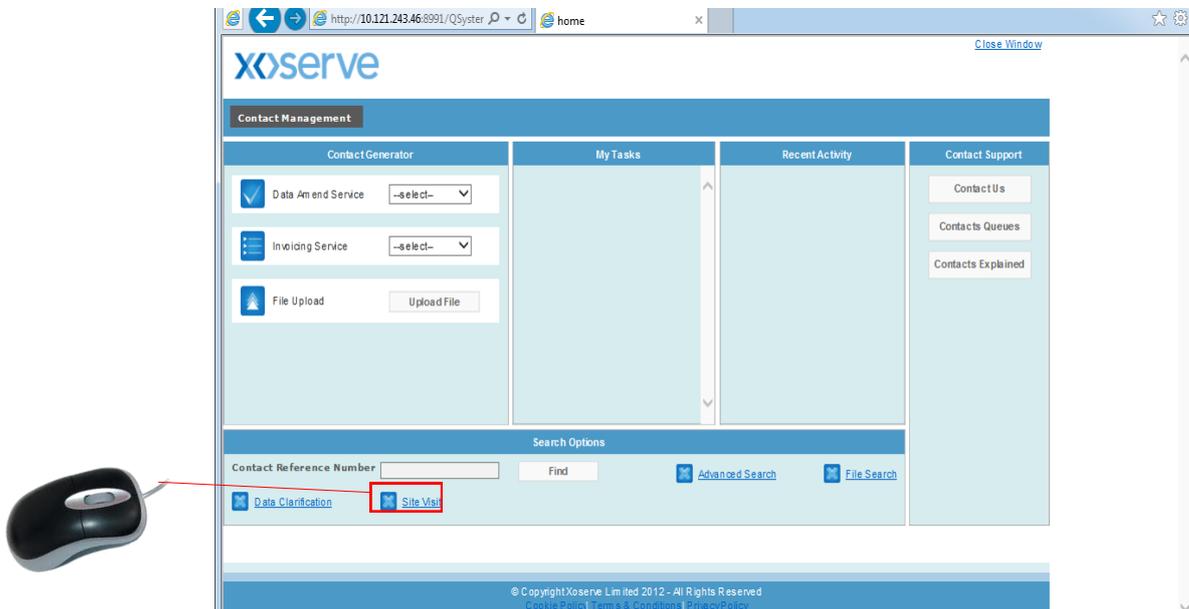
The screenshot shows the Xoserve Search Results interface. The search criteria are displayed, and the search results are shown in a table format. The table has columns for CRN, Contact Code, SSC, CED, Event Date, Logged Date, Priority, Contact Handler, SoS Days, Stakeholder Reference, Closed Date, Requested Date, and Response Date. The first row of results shows CRN 20004521, Contact Code ADD, SSC BUS, CED ADCT, Event Date 3/9/2012, Logged Date 3/9/2012, Priority LO, Contact Handler, SoS Days 0, Stakeholder Reference, Closed Date, Requested Date 3/9/2012, and Response Date.

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	

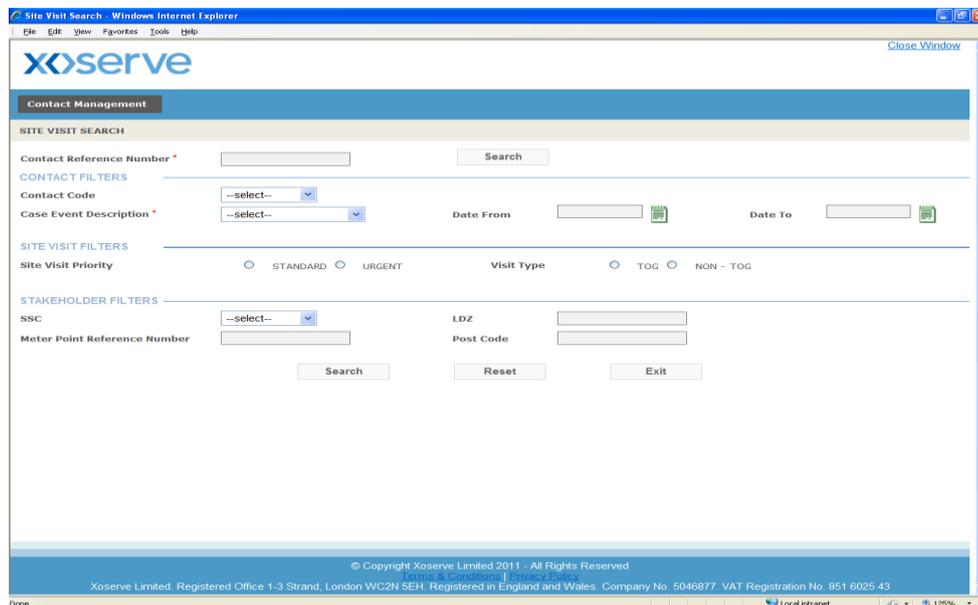
Select the CRN and the Data Clarification form will appear.

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.



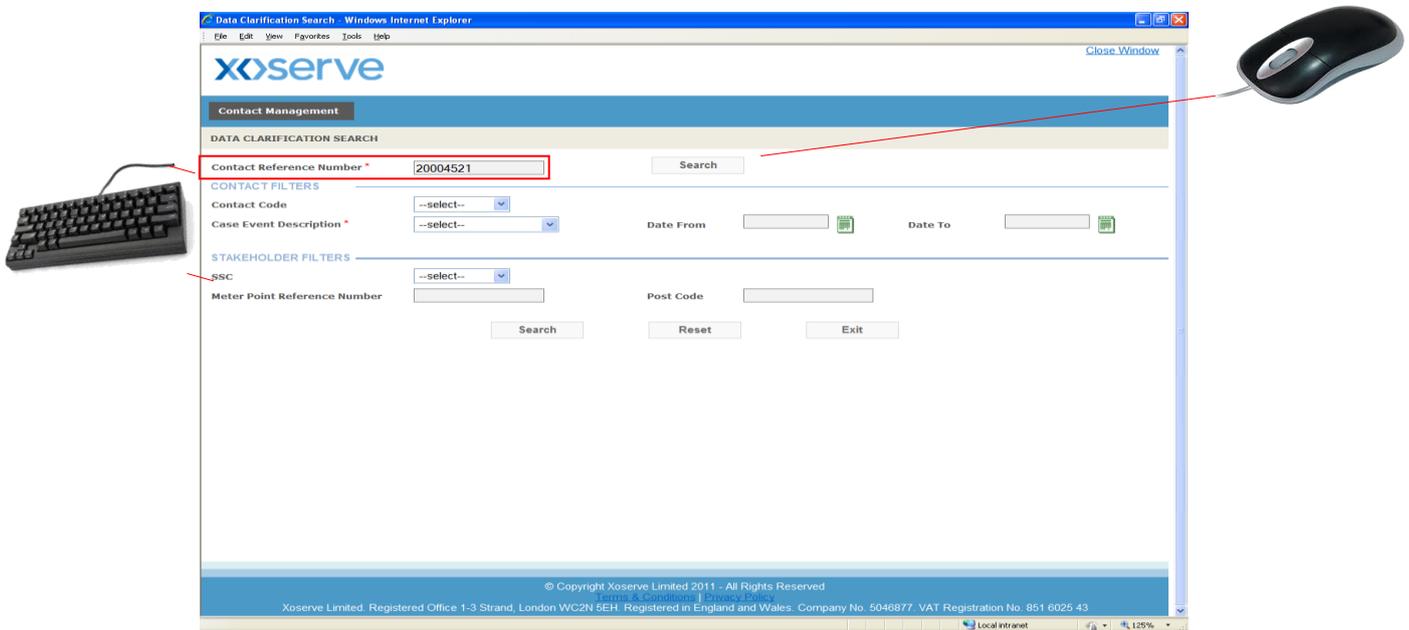
Search can be completed via CRN or various Filters . CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

7.6 Site Visit Search

Basic Search

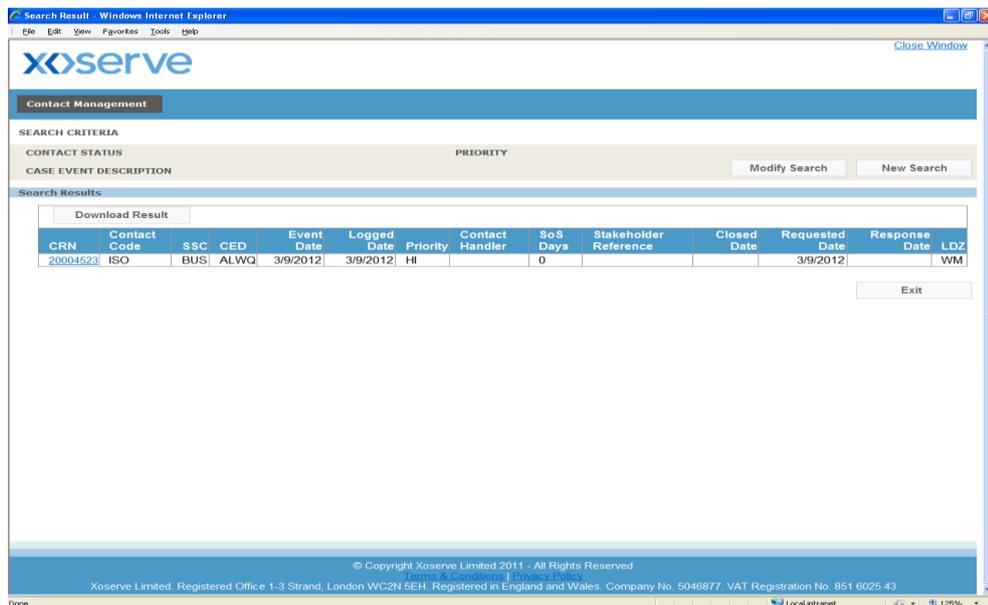
Step 1 – Enter your CRN into the Contact Reference Number field

Step 2 – Click Search.



The screenshot shows the 'Data Clarification Search' interface in Internet Explorer. The 'Contact Reference Number' field is highlighted with a red box and contains the value '20004521'. A red arrow points from a mouse cursor to the 'Search' button. A keyboard is also shown with a red arrow pointing to the 'Search' button.

The results will be displayed as follows....



The screenshot shows the 'Search Result' interface in Internet Explorer. The search criteria are displayed, and the search results are shown in a table format. The table has columns for CRN, Contact Code, SSC, CED, Event Date, Logged Date, Priority, Contact Handler, SoS Days, Stakeholder Reference, Closed Date, Requested Date, Response Date, and LDZ. The first row of results shows CRN 20004523, Contact Code ISO, SSC BUS, CED ALWQ, Event Date 3/9/2012, Logged Date 3/9/2012, Priority HI, Contact Handler, SoS Days 0, Stakeholder Reference, Closed Date, Requested Date 3/9/2012, Response Date, and LDZ WM.

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date	LDZ
20004523	ISO	BUS	ALWQ	3/9/2012	3/9/2012	HI		0			3/9/2012		WM

Select the CRN and the Site Visit will appear.

7.6 Site Visit Search

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 IGTR which is a SV back with Xoserve.

CONTACT FILTERS

Contact Code: DTL
Case Event Description: IGTR
Date From:
Date To:

SITE VISIT FILTERS

Site Visit Priority: STANDARD URGENT
Visit Type: TOG NON - TOG

STAKEHOLDER FILTERS

SSC: --select--
LDZ:
Meter Point Reference Number:
Postcode:

Search Reset Exit

The result will be displayed as follows....

SEARCH CRITERIA

CONTACT STATUS: PENDING OPEN CLOSED
CASE EVENT DESCRIPTION: IGTR
Priority: HI M L

Search Results

Download Result

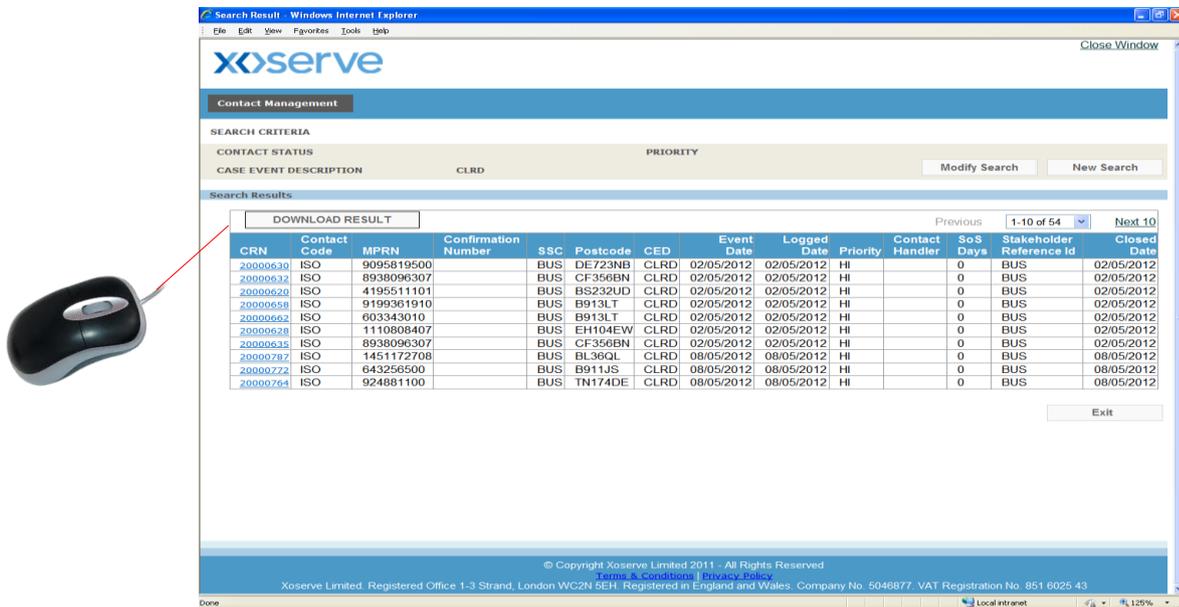
CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date	LDZ
20746302	DTL		IGTR	23/2/2016	11/11/2015	HI		0			11/11/2015	23/2/2016	

Exit

Select the CRN and the Site Visit will appear.

7.7 Download results

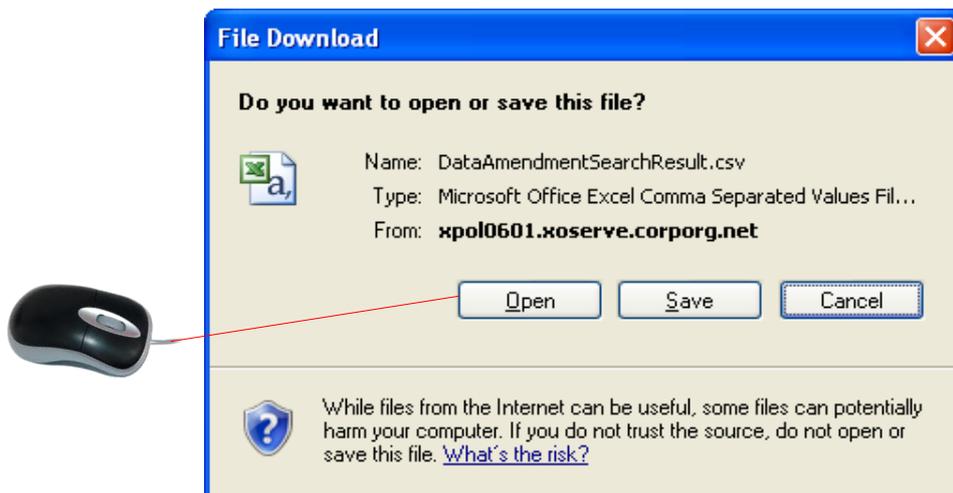
The Download Results facility is available on Advanced Search, File Search, Data Clarification and Site Visit.



The screenshot shows a web browser window displaying search results. A mouse cursor is pointing to the 'DOWNLOAD RESULT' button. The table below contains the following data:

CRN	Contact Code	MFRN	Confirmation Number	SSC	Postcode	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference Id	Closed Date
20000630	ISO	9095819500		BUS	DE723MB	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000632	ISO	8938096307		BUS	CF356BN	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000620	ISO	4195511101		BUS	BS232UD	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000658	ISO	9199361910		BUS	B913LT	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000662	ISO	603343010		BUS	B913LT	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000628	ISO	1110808407		BUS	EH104EW	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000635	ISO	8938096307		BUS	CF356BN	CLRD	02/05/2012	02/05/2012	HI		0	BUS	02/05/2012
20000787	ISO	1451172708		BUS	BL36QL	CLRD	08/05/2012	08/05/2012	HI		0	BUS	08/05/2012
20000772	ISO	643256500		BUS	B911JS	CLRD	08/05/2012	08/05/2012	HI		0	BUS	08/05/2012
20000764	ISO	924881100		BUS	TN174DE	CLRD	08/05/2012	08/05/2012	HI		0	BUS	08/05/2012

This allows the results returned to your search to be downloaded in .CSV format which can then be opened up in Excel. Select Download Results, the message below will appear....



The dialog box displays the following information:

- Do you want to open or save this file?**
- Name:** DataAmendmentSearchResult.csv
- Type:** Microsoft Office Excel Comma Separated Values Fil...
- From:** xpol0601.xoserve.corporg.net

Buttons:

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

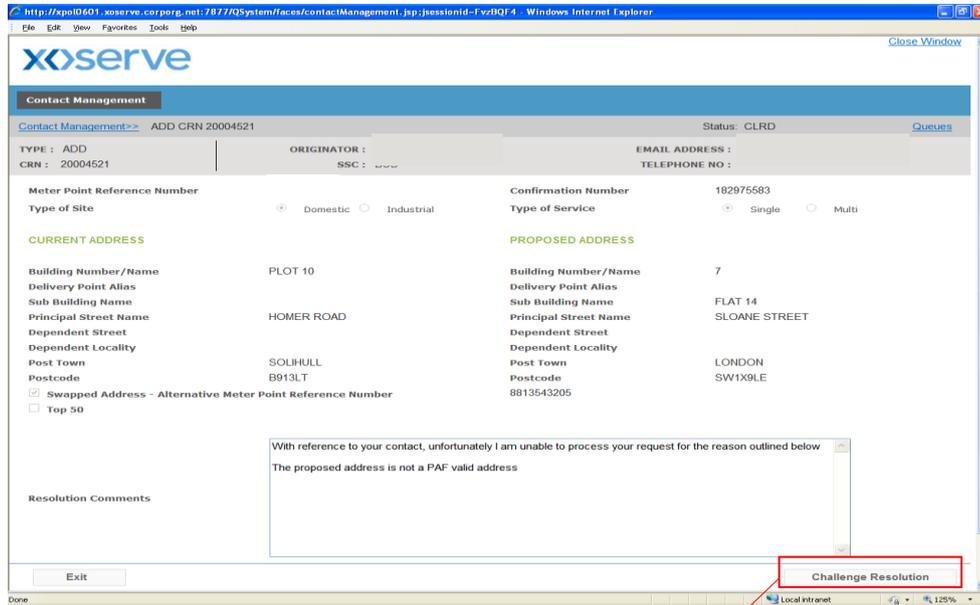
Select Open and the details will appear in an Excel format and these can then be saved where requested.

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.

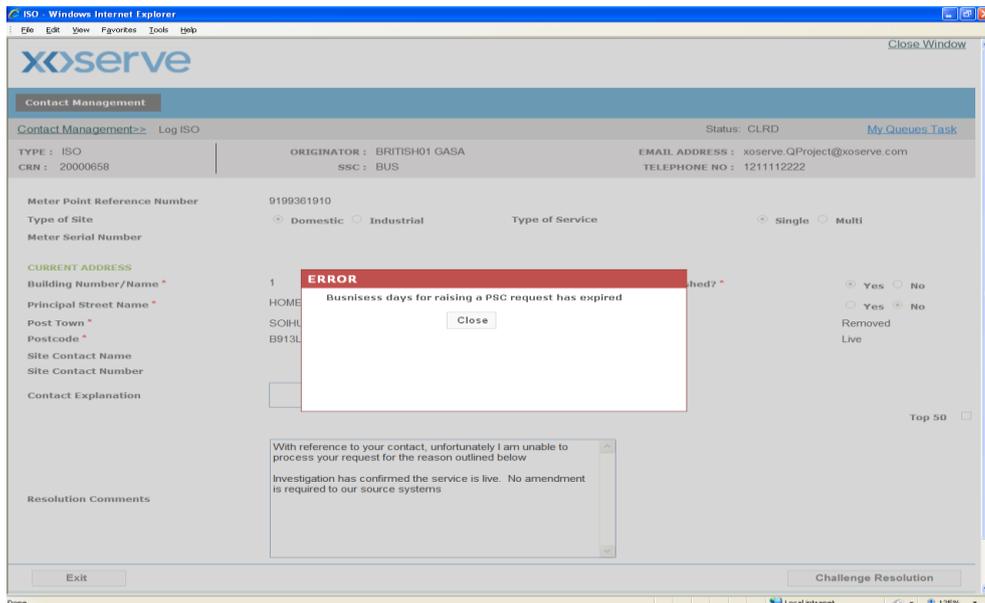
This feature can be found at the foot of the screen which displays the resolution comments provided for your Contact.



 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.

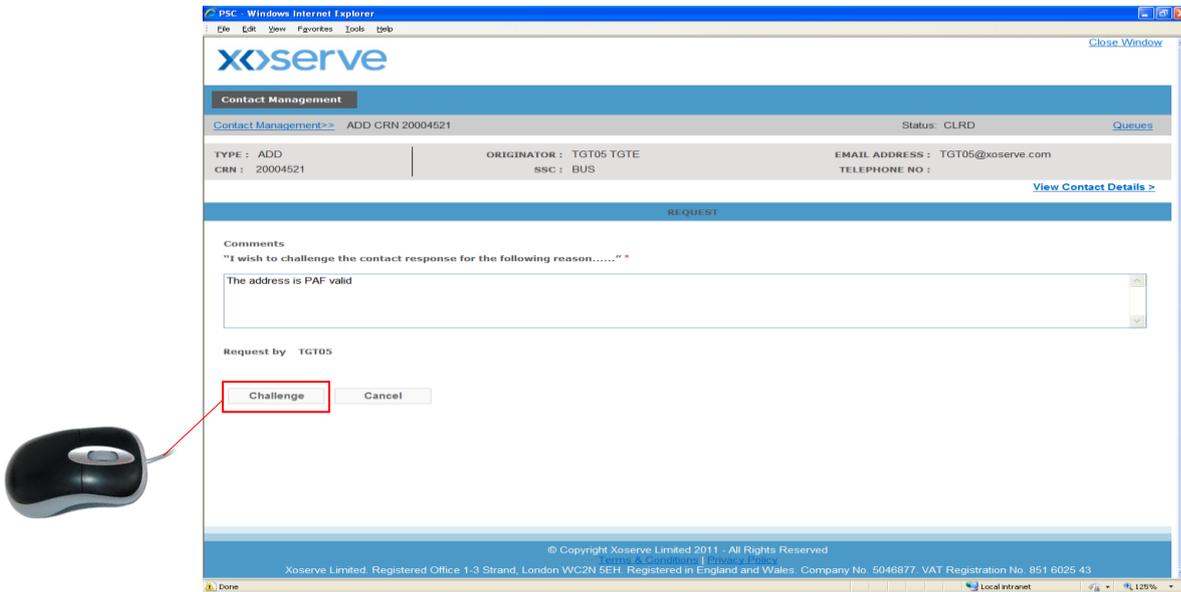


8.1 Raising a Previously Submitted Contact

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

Step 1 – Enter your comments

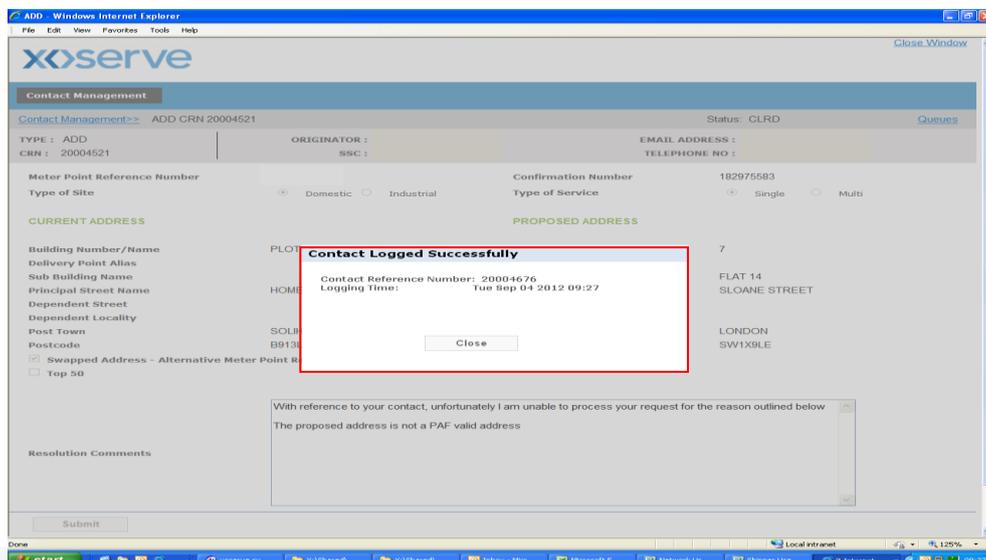
Step 2 – Click Challenge.



 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.

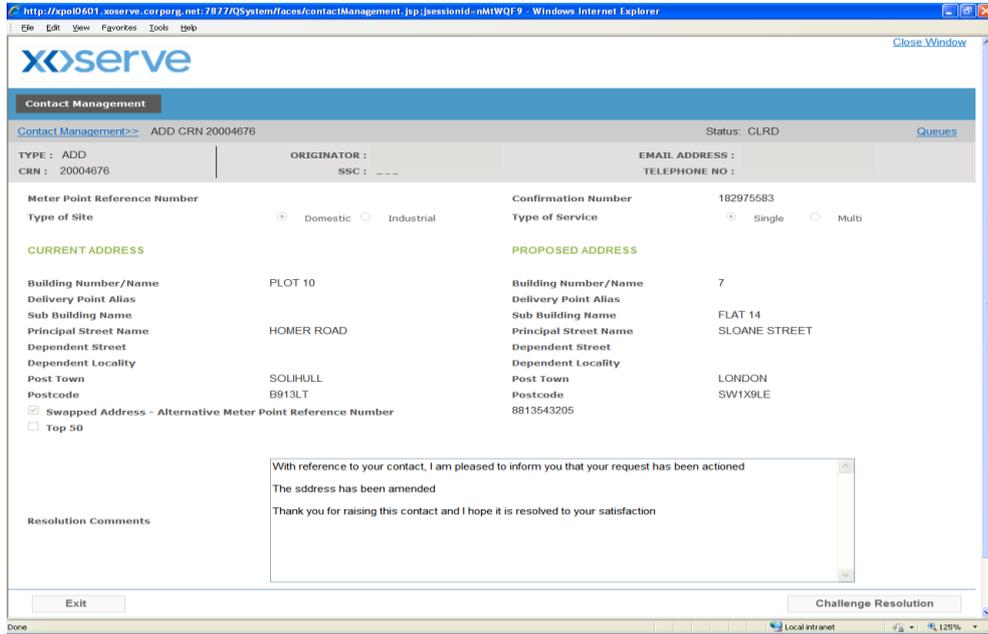
The following message will appear confirming the Contact has been submitted and the new Contact Reference Number for your request.



8.2 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 shows the Xoserve Contact Management interface in a Windows Internet Explorer browser window. The page title is "Contact Management" and the status is "CLRD". The contact details are as follows:

TYPE : ADD	ORIGINATOR :	EMAIL ADDRESS :
CRN : 20004676	SSC : ---	TELEPHONE NO :

Meter Point Reference Number	Confirmation Number
182975583	182975583

Type of Site	Type of Service
<input checked="" type="radio"/> Domestic <input type="radio"/> Industrial	<input checked="" type="radio"/> Single <input type="radio"/> Multi

CURRENT ADDRESS	PROPOSED ADDRESS
Building Number/Name: PLOT 10	Building Number/Name: 7
Delivery Point Alias: HOMER ROAD	Delivery Point Alias: FLAT 14
Sub Building Name: HOMER ROAD	Sub Building Name: SLOANE STREET
Principal Street Name: SOLIHULL	Principal Street Name: LONDON
Dependent Street: B913LT	Dependent Street: SW1X9LE
Dependent Locality: SOLIHULL	Dependent Locality: LONDON
Post Town: B913LT	Post Town: SW1X9LE
Postcode: B913LT	Postcode: SW1X9LE

Swapped Address - Alternative Meter Point Reference Number
 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.

Buttons: Exit, Challenge Resolution



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