



# **Contact Management User Guide**

## **Shipper Edition**

**Version 3.0**

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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



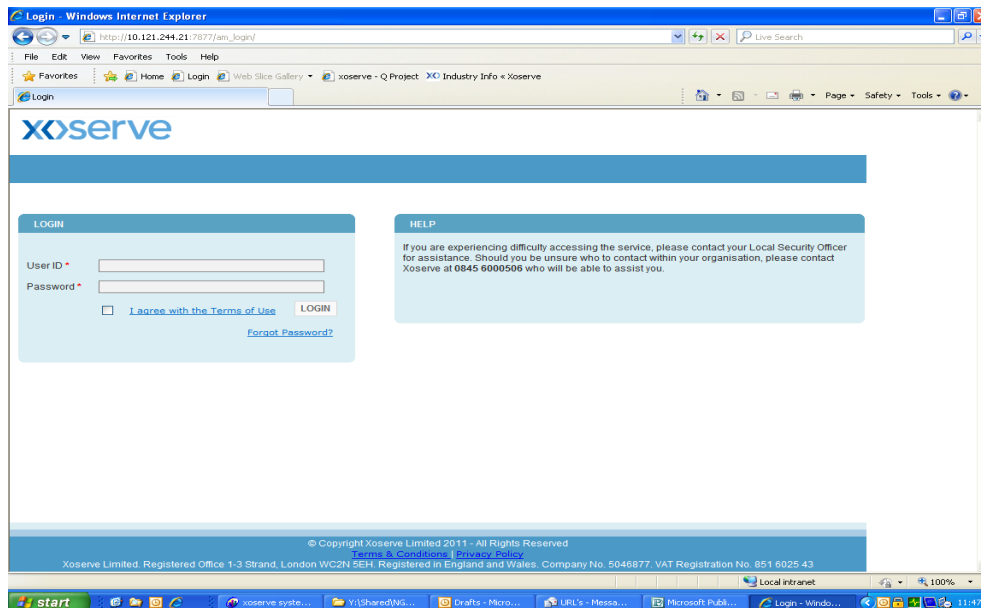
Keyboard entry required

## **Section 2**

# **Log onto Contact Management**

## 2.1 Log onto the Contact Management system

The portal Login Page looks as follows....

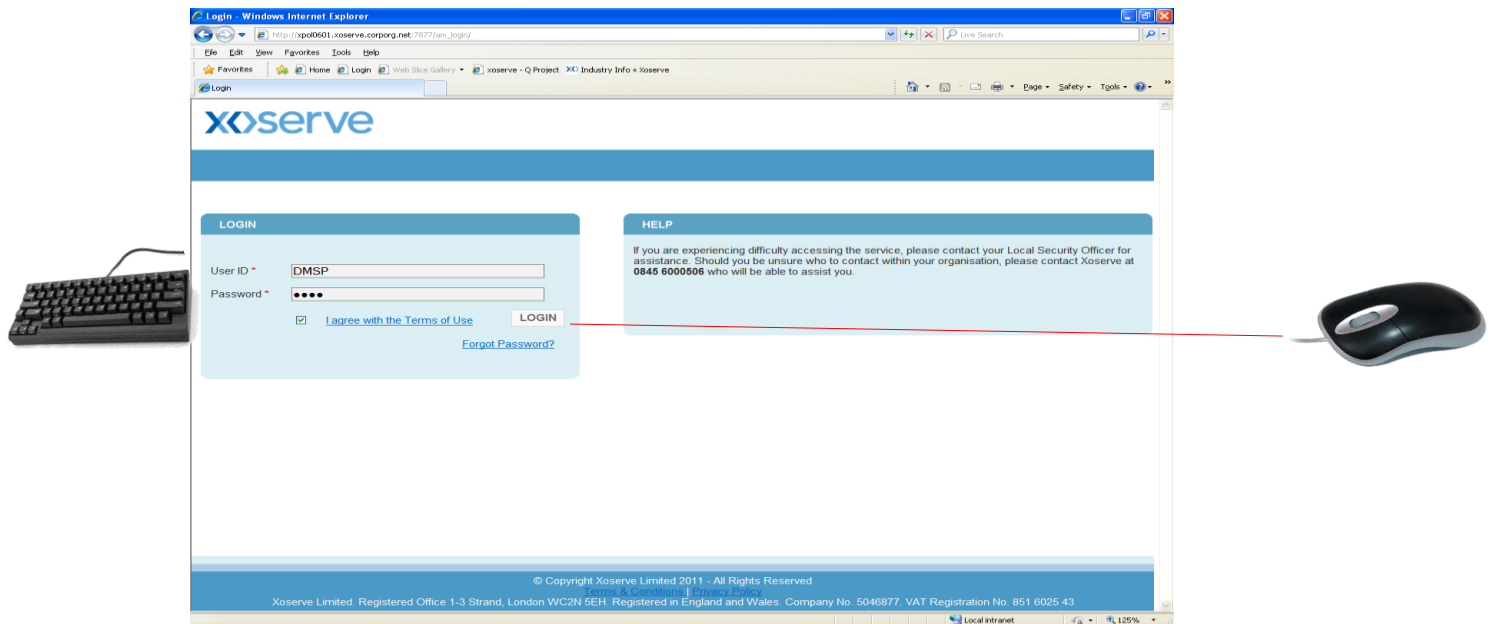


Step 1 – Enter your User ID

Step 2 – Enter your Password

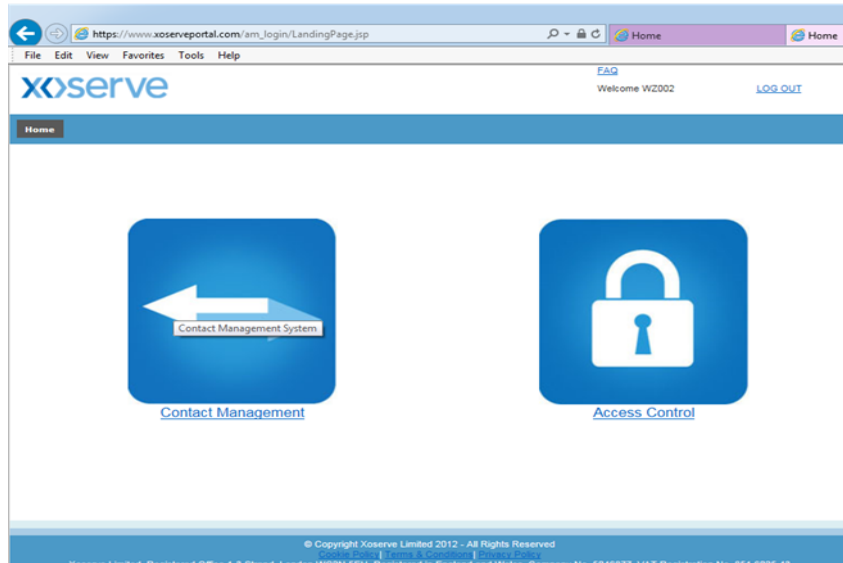
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



## 2.2 Contact Management Service Page

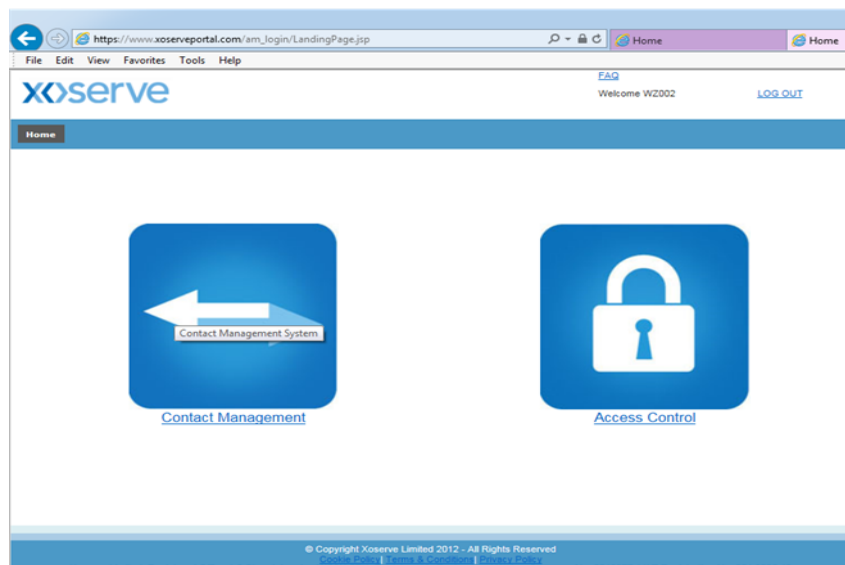
The following Service Page will appear....



There are two services on this page:-

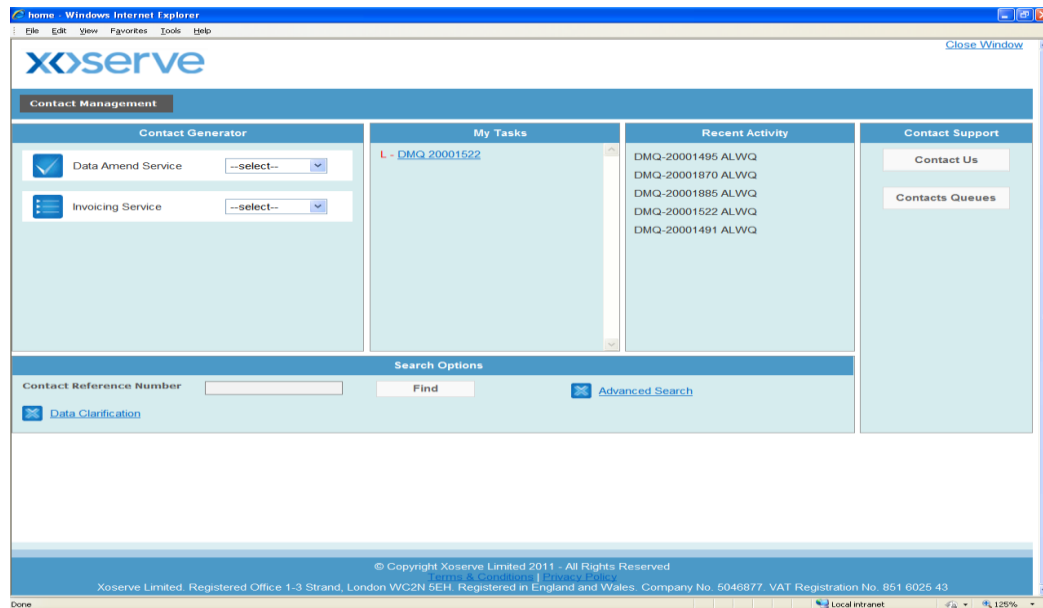
- ⇒ Contact Management
- ⇒ Access Controls

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.

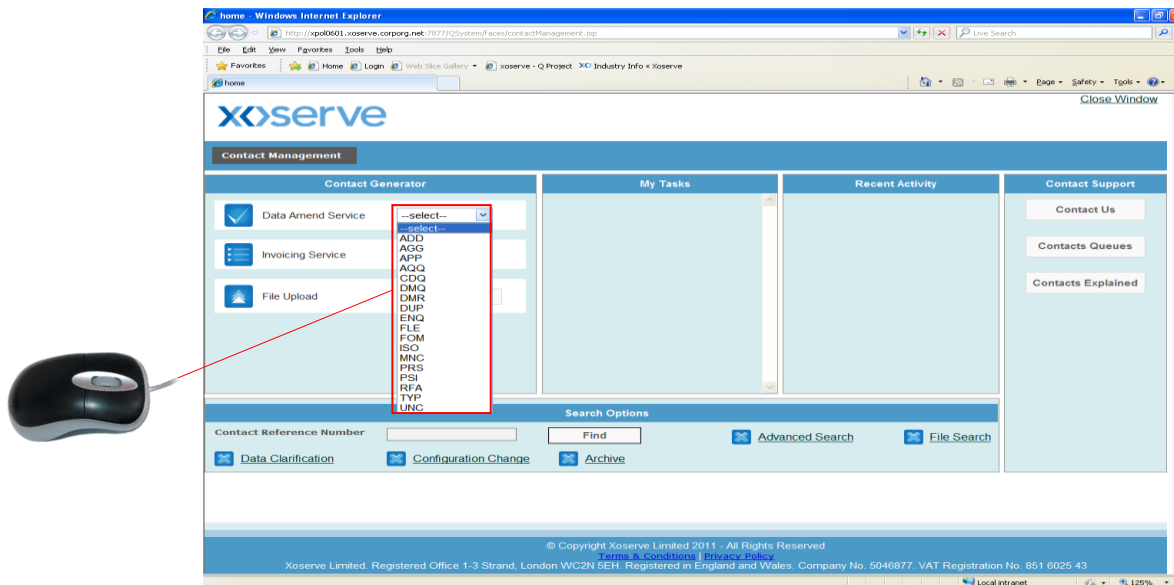


# **Section 3**

## **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 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 titled 'ADD - Windows Internet Explorer' displaying the 'Xserve' Contact Management interface. The page has a header with the 'Xserve' logo and a 'Close Window' button. Below the header, there's a 'Contact Management' section with a 'Log ADD' button. The main form area contains fields for 'TYPE: ADD', 'ORIGINATOR: BRITISH02 GA', 'SSC: BUS', 'EMAIL ADDRESS: BGas02@xserve.com', and 'TELEPHONE NO:'. There are also fields for 'Meter Point Reference Number' (1113475601), 'Confirmation Number' (186866537), 'Type of Site' (Domestic), and 'Type of Service' (Single). A red box highlights a confirmation message that says 'Contact Logged Successfully' with the 'Contact Reference Number: 20003799' and 'Logged Date/Time: Thu Aug 02 2012 10:37'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons, and a 'Top 50' link. The footer contains copyright information for Xserve 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.

Microsoft Excel - Q EFT Template - V1.0 Xoserve - BUS

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	V1.0 Xoserve	OMP [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.

Windows Internet Explorer

http://xp00601.xoserve.corp.org.net:7077/QSystem/aces/contactManagement.jsp

File Edit View Favorites Tools Help

Home Xoserve - Q Project Xoserve - Industry Info Xoserve

Close Window

**Xoserve**

**Contact Management**

**Contact Generator**

- ☒ Data Amend Service --select--
- ☐ Invoicing Service --select--
- ☒ File Upload Upload File

**My Tasks**

**Recent Activity**

**Contact Support**

- Contact Us
- Contacts Queues
- Contacts Explained

**Search Options**

Contact Reference Number Find Advanced Search File Search

☒ Data Clarification ☒ Configuration Change ☒ Archive

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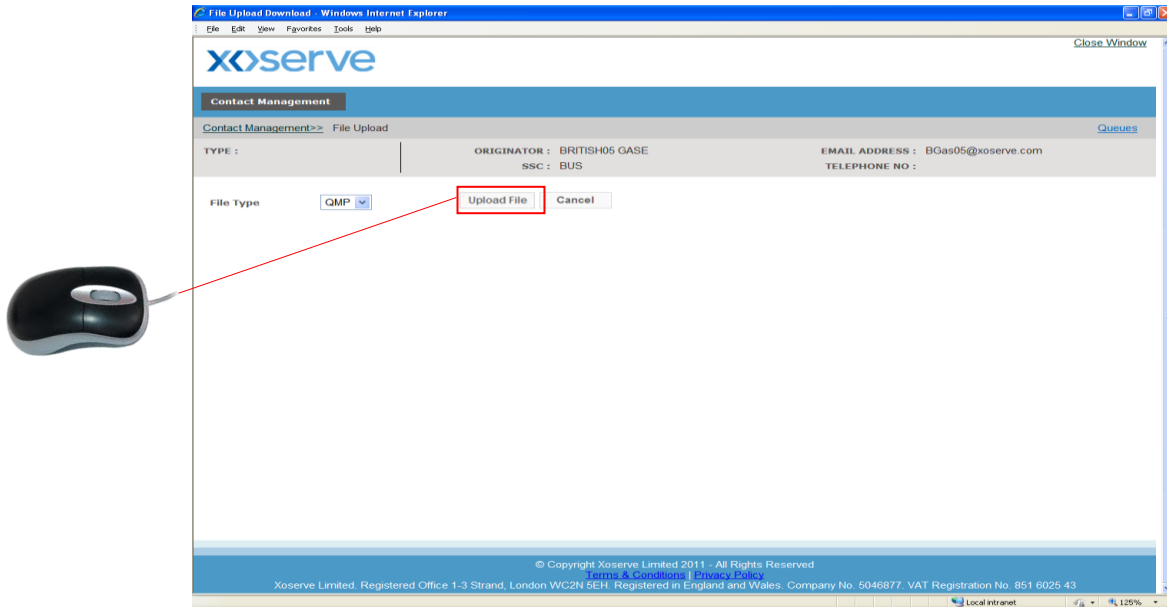
Done Local intranet 125%

## 3.2 File Upload

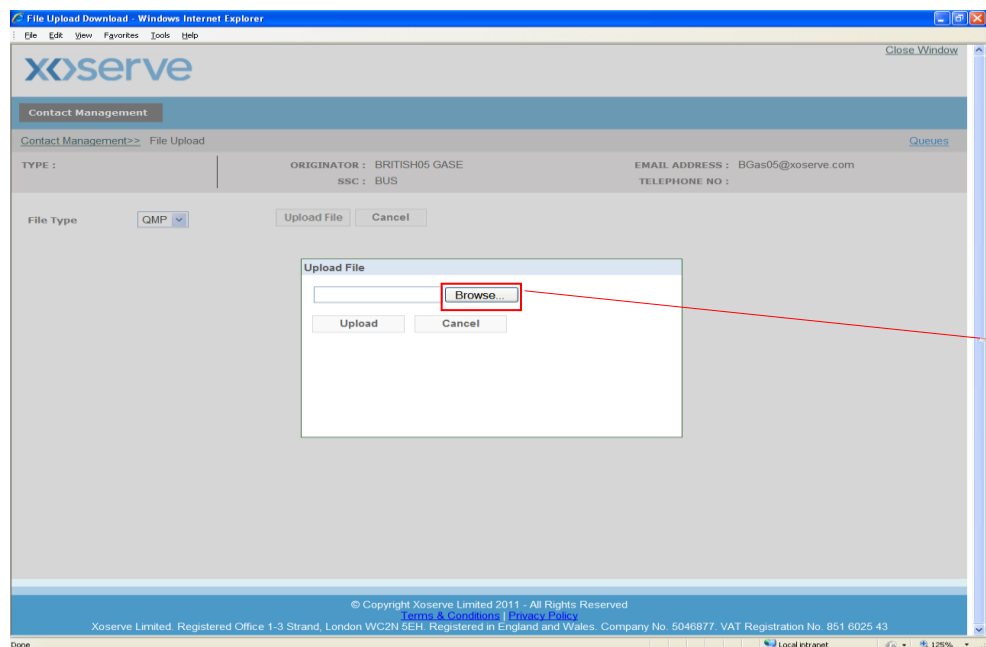
The following screen will appear.



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

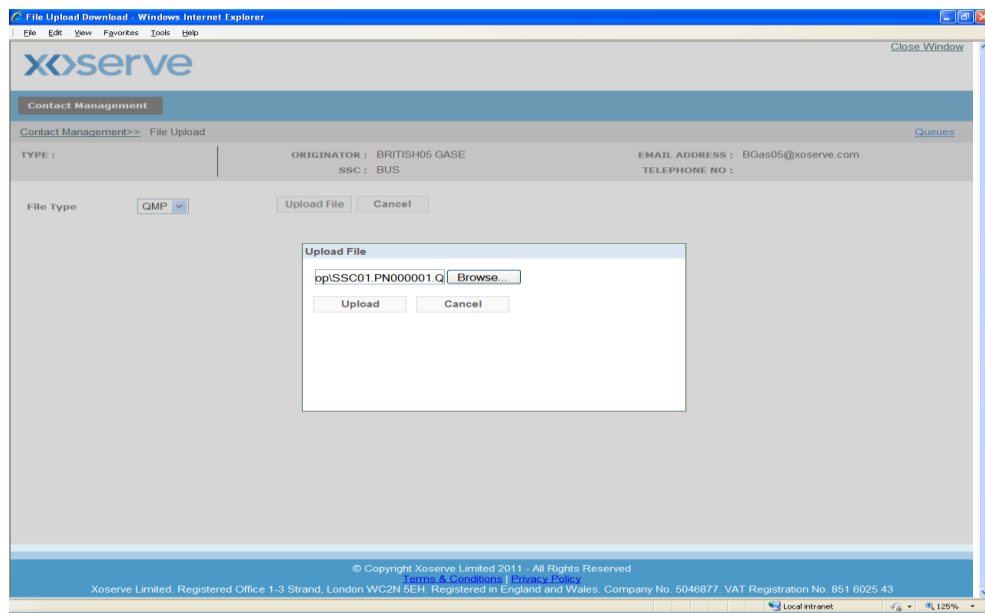


Select file upload and the File Upload screen will appear....



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.

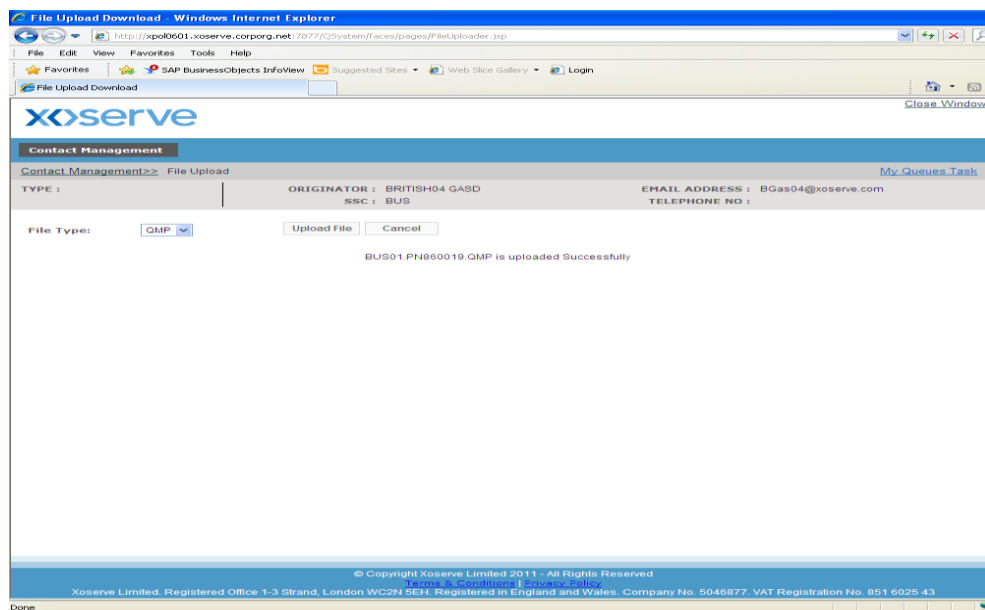
## 3.2 File Upload



Select Upload, and the file is submitted.

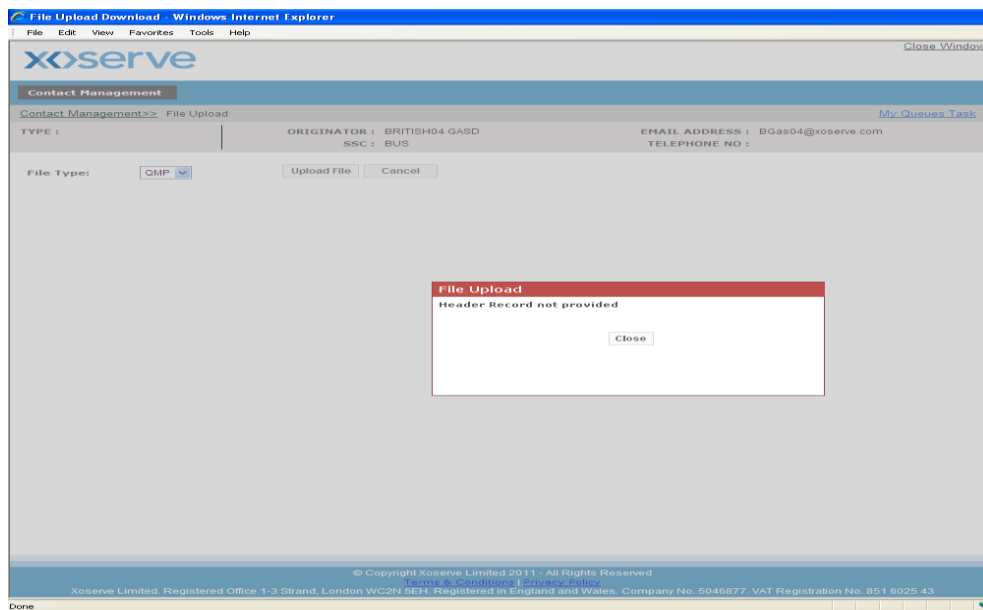
You will receive a message at this point stating whether the submission has successfully loaded or rejected.

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.

ADD - Windows Internet Explorer

Close Window

Contact Management

Contact Management >> Log ADD

TYPE: ADD

ORIGINATOR: BRITISH02 GA

SSC: BUS

Status: New

My Queues Task

EMAIL ADDRESS: BGas02@xoserve.com

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.

DUP - Windows Internet Explorer

Close Window

Contact Management

Contact Management >> Log DUP

TYPE: DUP

ORIGINATOR: BRITISH02 GA

SSC: BUS

Status: New

My Queues Task

EMAIL ADDRESS: BGas02@xoserve.com

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

your contact)

Top 50 ☒

**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

Close

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# **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 has a blue header with the 'Xoserve' logo. Below the header, there's a 'Contact Management' section with a 'Work Allocation >>' link and a 'BUS' tab. The main area is titled 'BUS - WORK QUEUE' and has three tabs: 'My Tasks', 'Contacts Queue', and 'Actions Queue'. The 'Actions Queue' tab is selected. Below the tabs, there are filters for 'Contact code' (set to 'All'), 'SSC' (set to 'All'), and 'Type' (set to 'All'). A 'Refine' button is to the right. Below the filters is a table with the following data:

SELECT	TYPE	CONTACT	CRN-ID	SSC	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Data Clarification	ISO	20000740-DC1	BUS	08/05/2012 10:26:45	11/05/2012 00:00:00	Not Allocated
<input type="checkbox"/>	Data Clarification	DUP	20001196-DC1	BUS	16/05/2012 10:11:37		Not Allocated
<input type="checkbox"/>	Data Clarification	ISO	20001895-DC1	GUK	24/05/2012 14:12:15	30/05/2012 00:00:00	Not Allocated

Below the table, there is an 'Assign To Me' button and an 'Exit' button. At the bottom of the page, there is a footer with copyright information: '© Copyright Xoserve Limited 2011 - 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 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 another 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

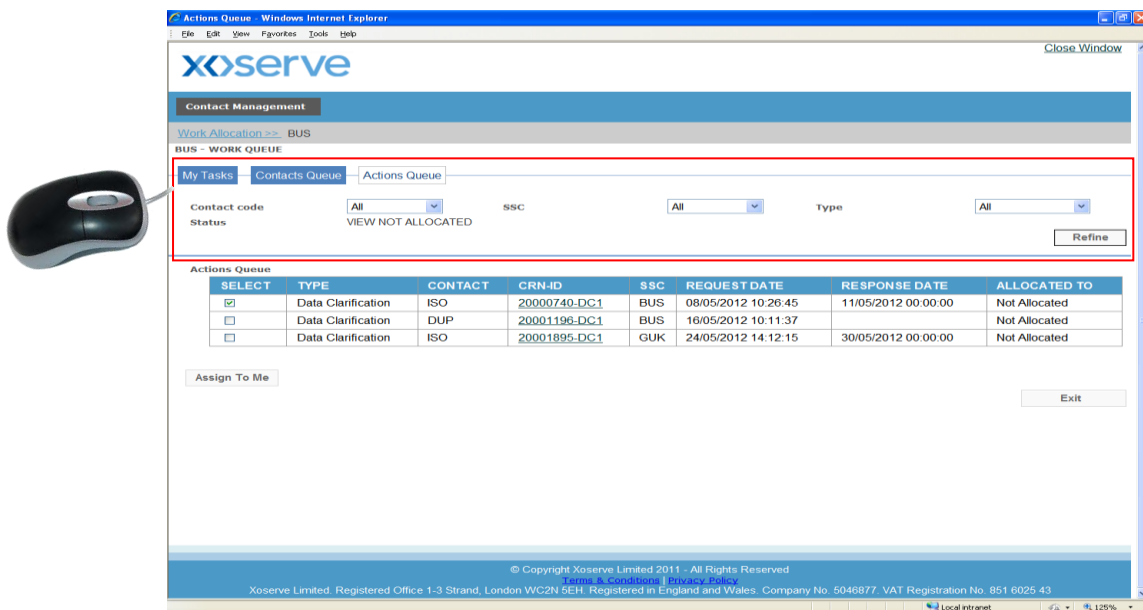
The Contacts Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue may be as a result of a Contact raised by another Shipper, e.g. Data Clarification or Configuration Change request.

### 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 'Actions Queue' window in a Windows Internet Explorer browser. The window title is 'Actions Queue - Windows Internet Explorer'. The browser address bar shows 'Close Window'. The page header includes the 'xserve' logo and 'Contact Management'. Below the header, there are tabs for 'My Tasks', 'Contacts Queue', and 'Actions Queue'. The 'Contacts Queue' tab is selected. The main content area displays a table of contacts. The table has columns: SELECT, TYPE, CONTACT, CRN-ID, SSC, REQUEST DATE, RESPONSE DATE, and ALLOCATED TO. The first contact is a 'Data Clarification' for 'ISO' with CRN-ID '20000740-DC1', SSC 'BUS', and REQUEST DATE '08/05/2012 10:26:45'. The second contact is a 'Data Clarification' for 'DUP' with CRN-ID '20001196-DC1', SSC 'BUS', and REQUEST DATE '16/05/2012 10:11:37'. The third contact is a 'Data Clarification' for 'ISO' with CRN-ID '20001895-DC1', SSC 'GUK', and REQUEST DATE '24/05/2012 14:12:15'. All contacts are 'Not Allocated'. The table is filtered by 'Contact code' (All), 'Status' (VIEW NOT ALLOCATED), and 'Type' (All). There is a 'Refine' button. Below the table, there is an 'Assign To Me' button. The footer of the page contains copyright information: '© Copyright Xserve Limited 2011 - All Rights Reserved' and 'Xserve Limited. Registered Office 1-3 Strand, London WC2N 5EH. Registered in England and Wales. Company No. 5046877. VAT Registration No. 851 6025 43'.

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.



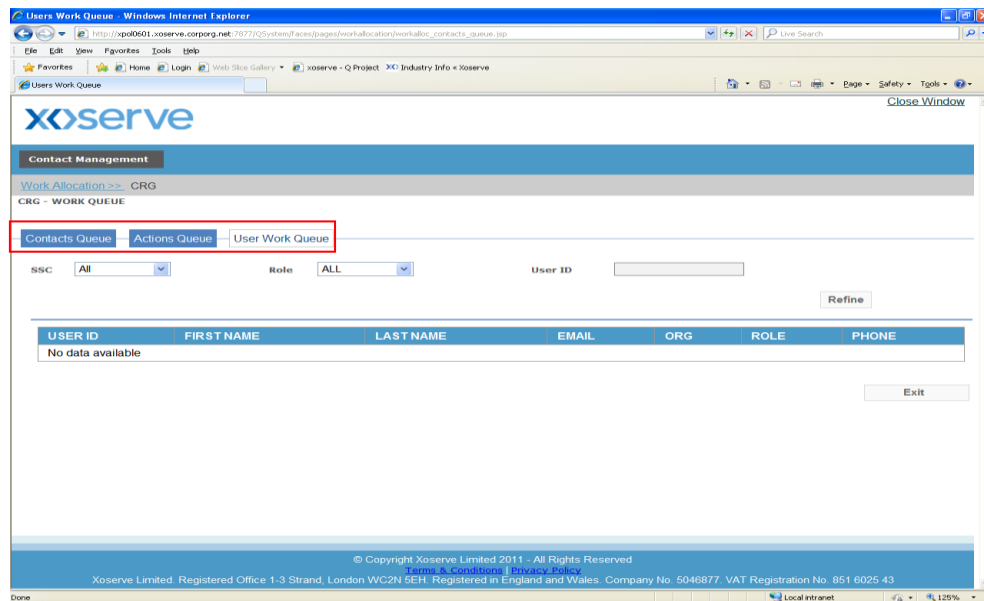
This will then appear in the Action Queue and can be worked upon by another person.



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 another 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

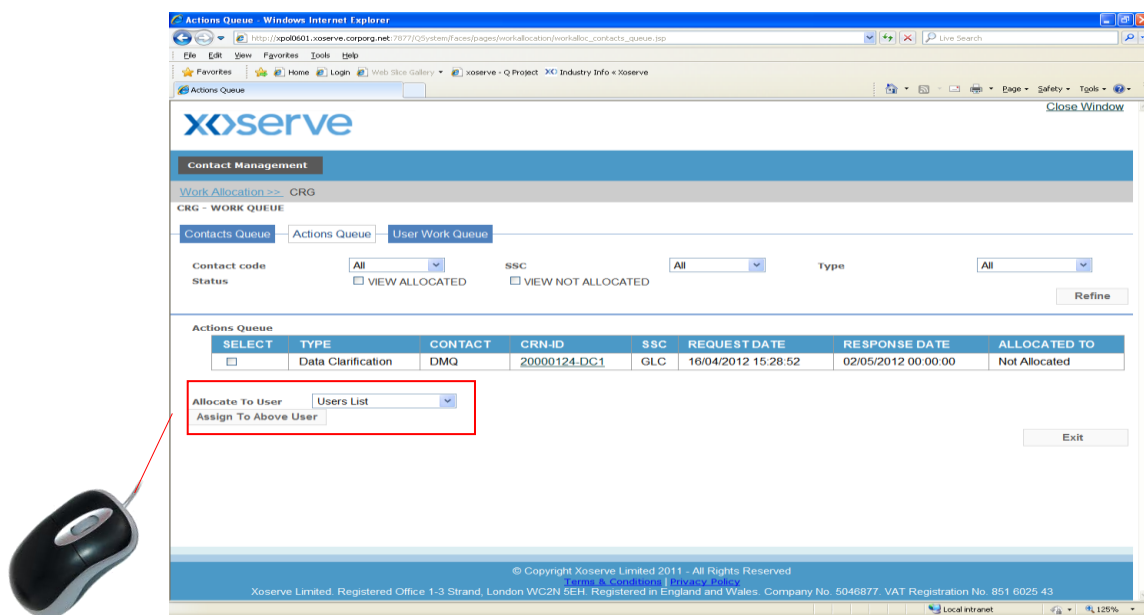
Step 1 – Find the Contact in the queue

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 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

**Contact Management**

Work Allocation >> BUS

BGAS01 - WORK QUEUE

Userid	Organization	First Name	Role	SSC	REQUESTED DATE	RESPONSE DATE	LOGGED DATE	ALLOCATED TO
BGAS01	BUS	Not Available						

SELECT	ELEMENT	CONTACT	CRN	SSC	REQUESTED DATE	RESPONSE DATE	LOGGED DATE	ALLOCATED TO
<input type="checkbox"/>	Data Clarification	ISO	20001998	BUS	28/05/2012 10:05:11		28/05/2012 09:05:24	BGAS01
<input type="checkbox"/>	Data Clarification	DMQ	20001373	BUS	16/08/2012 15:12:29		18/05/2012 14:25:47	BGAS01
<input type="checkbox"/>	Configuration Change	TYP	20000691	ATL	22/08/2012 14:06:04	24/08/2012 14:06:04	03/05/2012 15:15:58	BGAS01
<input type="checkbox"/>	Data Clarification	DUP	20004181	BUS	24/08/2012 09:12:23	24/08/2012 09:12:23	14/08/2012 12:39:26	BGAS01

Transfer To Queue

Exit

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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**

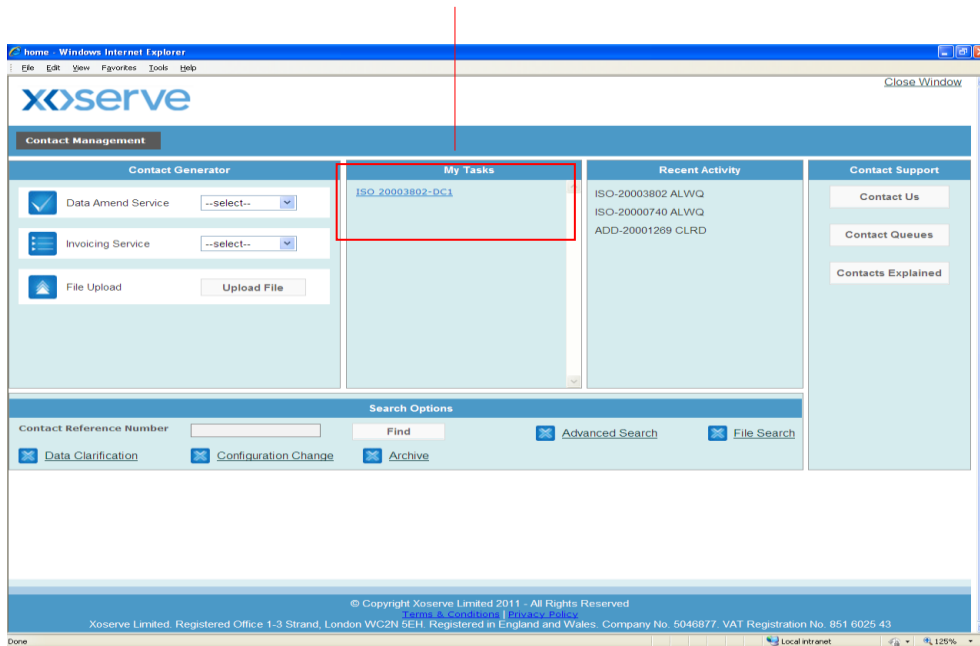



## 5.1 Receiving a Data Clarification Request


In response to your original Contact or a Contact raised by another Shipper, Xoserve may require further information and will send a Data Clarification request.

### Your Original Contact

The Data Clarification request will become visible in your My Tasks. It relates to the Contact you have previously sent to Xoserve.



 The Data Clarification Request is a point-to-point communication between the Contact Originator and the Contact Handler.

 The format of the reference number consists of the Contact Type, the Contact Reference number, the correspondence type (DC) and the count (1 or 2)

Please see page 27-29 for actioning the Data Clarification.

## 5.1 Receiving a Data Clarification Request

### 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.

SELECT	TYPE	CONTACT	CRN-ID	SSC	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Data Clarification	PRS	20004148-DC2	BUS	13/08/2012 15:03:39	13/09/2012 11:30:05	Not Allocated

Step 1 – Select the box for the relevant Contact

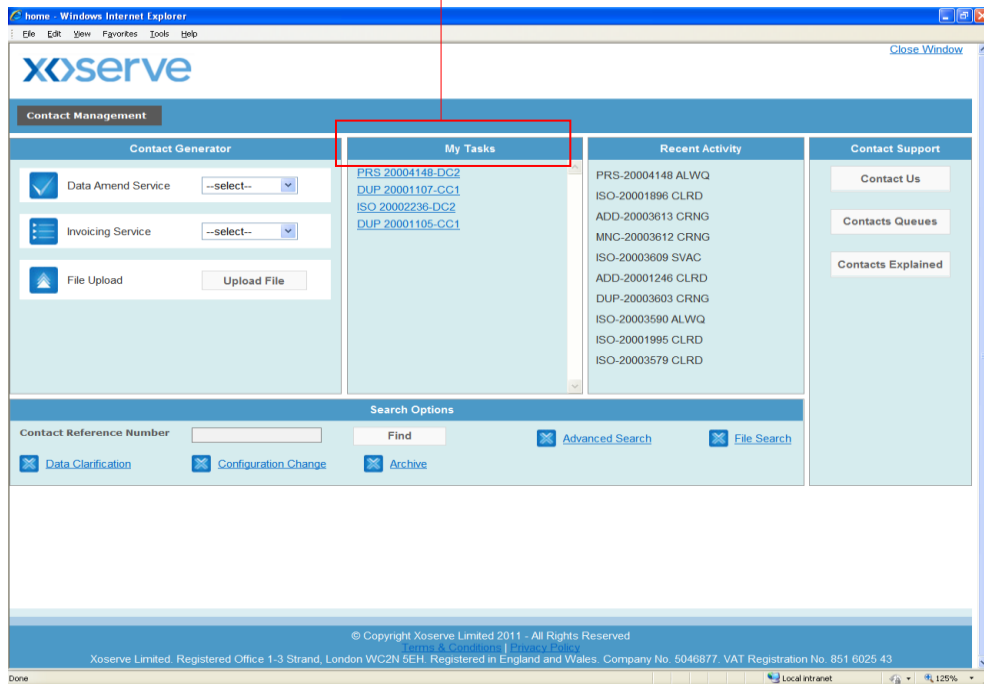
Step 2 – Click Assign to me



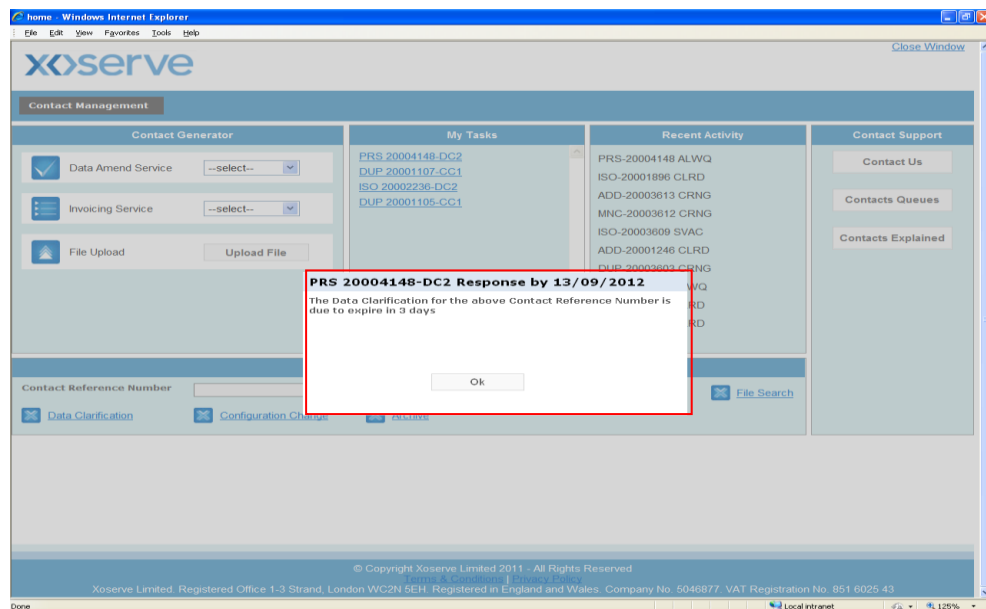
SELECT	TYPE	CONTACT	CRN-ID	SSC	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input checked="" type="checkbox"/>	Data Clarification	PRS	20004148-DC2	BUS	13/08/2012 15:03:39	13/09/2012 11:30:05	Not Allocated

## 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

**Data Clarification Response** - Windows Internet Explorer

**Contact Management**

Contact Management >> Data Clarification Status: ALWQ Queues

TYPE : PRS ORIGINATOR : STEVE MUNN EMAIL ADDRESS : Steve.Munn@xoserve.com  
CRN : 20004148 SSC : BUS TELEPHONE NO : 1216232598

DC ID : 20004148-DC2 [View Contact Details >](#)

**SITE DETAILS**

Building Name	2	Locality	
Building Number		Post Town	LONDON
Sub Building Name		Postcode	SW16 1QT
Principal Street	RIGGINDALE ROAD	Delivery Point Alias	
Dependent Street	MAIN ROAD		

**SUPPLY POINT DETAILS**

Meter Point Reference Number	503225603	Confirmation Number	
Meter Serial Number		Datalogger Id (A15)	

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

**Data Clarification Response Configuration** - Windows Internet Explorer

**Contact Management**

Contact Management >> Data Clarification Status: ALWQ Queues

TYPE : PRS ORIGINATOR : STEVE MUNN EMAIL ADDRESS : Steve.Munn@xoserve.com  
CRN : 20004148 SSC : BUS TELEPHONE NO : 1216232598

DC ID : 20004148-DC2

**REQUEST**

Dispatch Date 11/09/2012

I am unable to process your contact for the following reason  
Site Details  
Please provide the following information in order for me to proceed  
Please provide a suitable time for gaining access

**Additional Information**

Time given - no answer

Request by UATSM01

**RESPONSE**

Due Date 13/09/2012

Comments

Response by BRITISH GAS

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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 displays the 'Data Clarification Response Configuration' web application in a Windows Internet Explorer browser. The page features a blue header with the 'Xoserve' logo and a 'Close Window' button. Below the header, there's a 'Contact Management' section with a 'Data Clarification' tab. The main content area is divided into two columns: 'REQUEST' and 'RESPONSE'. The 'REQUEST' column shows a 'Dispatch Date' of 11/09/2012 and a 'Comments' box with the text: 'I am unable to process your contact for the following reason Site Details Please provide the following information in order for me to proceed Please provide a suitable time for gaining access'. The 'RESPONSE' column shows a 'Due Date' of 13/09/2012 and a 'Comments' box with the text: 'Mr Smith, 0121 711 5489'. At the bottom of the 'RESPONSE' section, there's a 'Response by' field with the value 'BRITISH GAS' and two buttons: 'Submit' (highlighted with a red box) and 'Cancel'. A red line connects the 'Submit' button to a mouse cursor on the right. The footer contains copyright information for Xoserve Limited 2011.

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



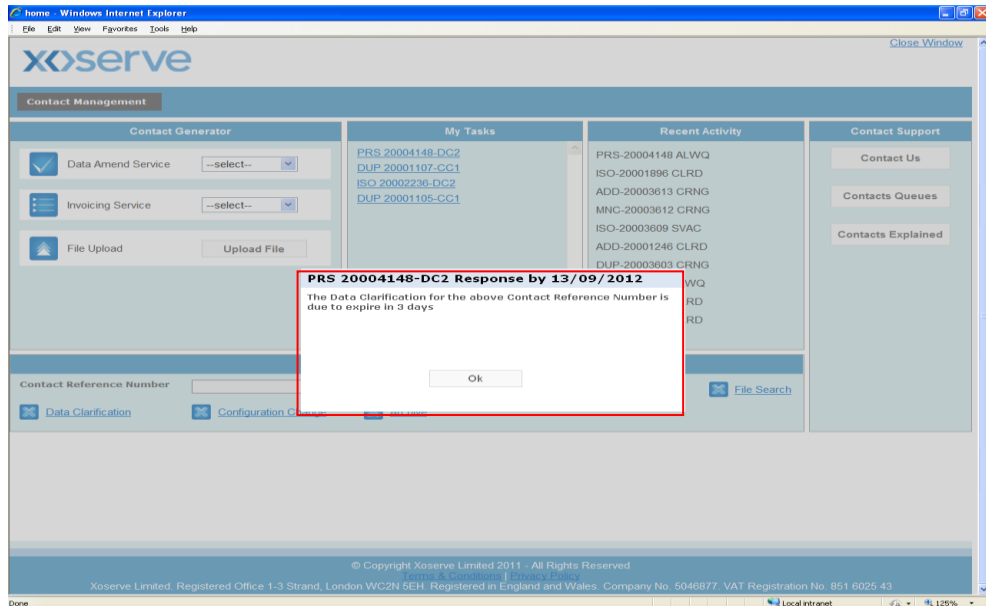
Your name is populated in the 'Response by' field when you click Submit.



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.

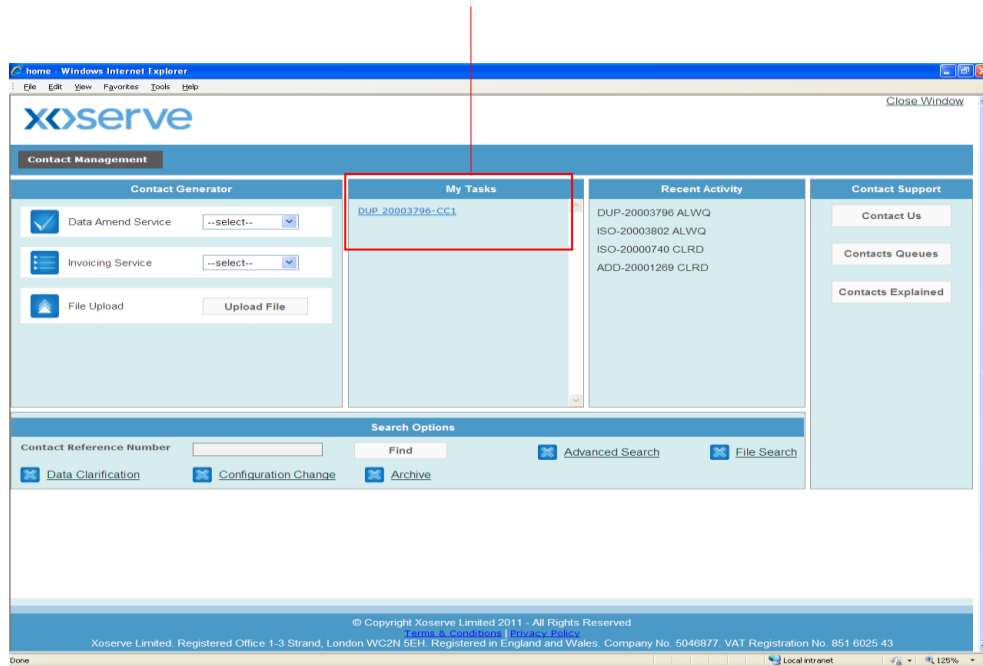
E.g. DC1 responded after 15 days since it was sent  
DC2 sent on day 16 therefore 4 business days will remain

## 5.4 Receiving a Configuration Change Request

In response to your original Contact or a Contact raised by another Shipper, Xoserve will require prior action by you before proceeding with the processing of the Contact. Xoserve also require an update from yourself to say the action has been completed.

### Your Original Contact

The Configuration Change request (CC) will become visible in your My Tasks. It relates to the Contacts you have previously sent to Xoserve.



The Configuration Change Request is a point-to-point communication between the Contact Originator and the Contact Handler

Please see page 33-35 for actioning the Configuration Change Request

## 5.4 Receiving a Configuration Change Request

### Third Party Configuration Change Request

This request will appear in the Contact Queue under the support section on the Contact Management home page. Select the Actions 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 in a Windows Internet Explorer browser. The page title is "My Tasks - Windows Internet Explorer". The Xoserve logo is at the top left. Below the logo, there's a "Contact Management" section with a "Work Allocation >>> BUS" link. The main area is titled "BUS - WORK QUEUE" and has tabs for "My Tasks", "Contacts Queue", and "Actions Queue". The "Actions Queue" tab is selected, displaying a table with the following data:

SELECT	ELEMENT	CONTACT	CRN-ID	SSC	REQUEST DATE	RESPONSE by DATE	LOGGED DATE	ALLOCATED TO
<input type="checkbox"/>	Configuration Change	DUP	<a href="#">20001105-CC1</a>	BUS	06/09/2012 11:20:07	10/09/2012 11:20:07	14/05/2012 12:45:22	BGAS03
<input type="checkbox"/>	Data Clarification	ISO	<a href="#">20002236-DG2</a>	BUS	07/09/2012 09:33:56	10/09/2012 09:33:56	29/05/2012 12:21:30	BGAS03
<input type="checkbox"/>	Configuration Change	DUP	<a href="#">20001107-CC1</a>	BUS	11/09/2012 06:42:14	13/09/2012 06:42:14	14/05/2012 12:45:31	BGAS03

Below the table is a "Transfer To Queue" button. 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

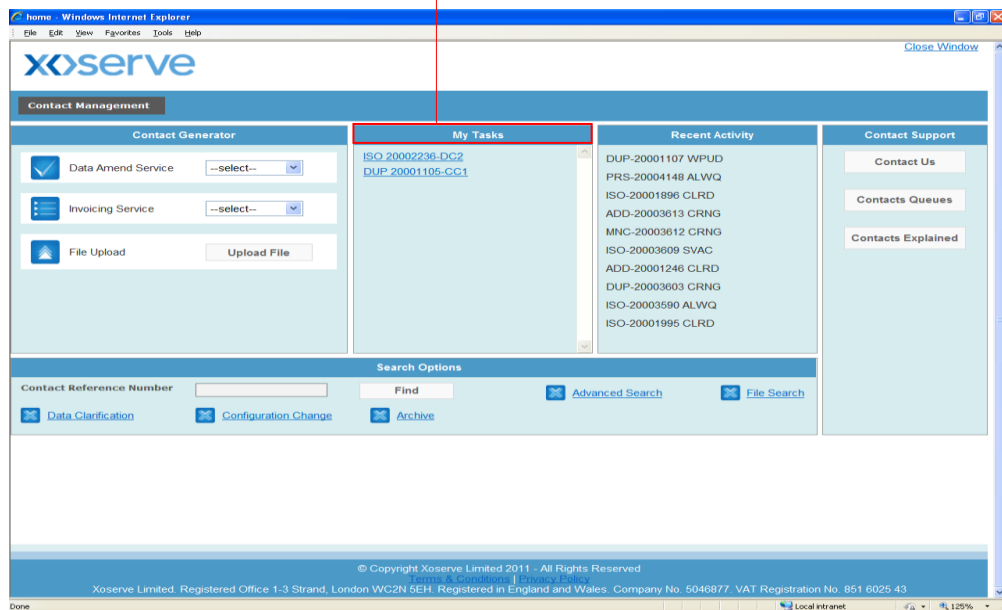
Step 2 – Click Assign to me

This screenshot is identical to the one above, showing the Xoserve Contact Management interface. A mouse cursor is pointing at the "Transfer To Queue" button, which is highlighted with a red rectangle. The table data remains the same.

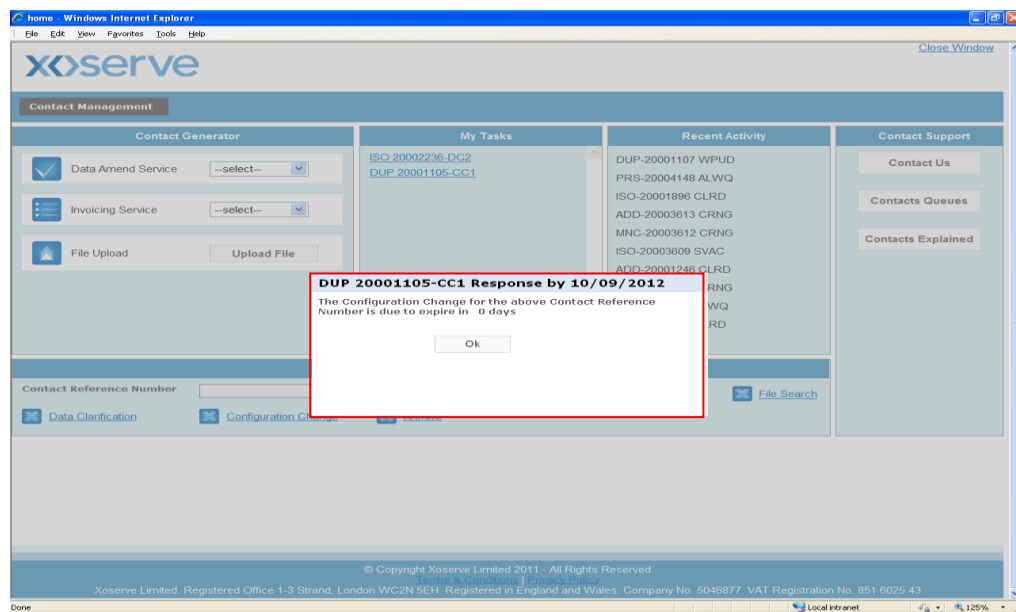


## 5.4 Receiving a Configuration Change Request

The Contact will become visible in your my Tasks.

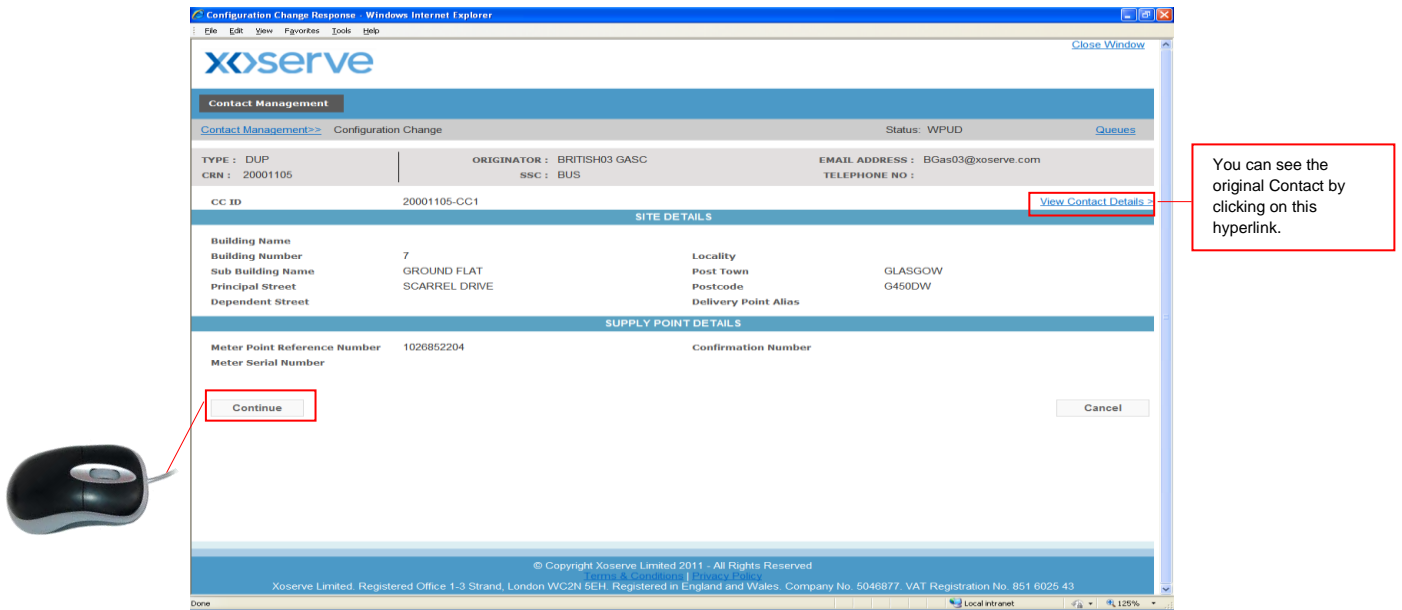


When the CC is selected the message below will appear stating the CC number and when a response is due by.



Click Ok and you will be taken into the initial Contact raised.

## 5.4 Receiving a Configuration Change Request



Configuration Change Response - Windows Internet Explorer

**Contact Management**

Contact Management >> Configuration Change Status: WPUD Queues

TYPE : DUP CRN : 20001105 ORIGINATOR : BRITISH03 GASC SSC : BUS EMAIL ADDRESS : BGas03@xoserve.com TELEPHONE NO :

CC ID 20001105-CC1 [View Contact Details](#)

**SITE DETAILS**

Building Name	7	Locality	GLASGOW
Building Number	GROUND FLAT	Post Town	G450DW
Sub Building Name	SCARREL DRIVE	Postcode	
Principal Street		Delivery Point Alias	
Dependent Street			

**SUPPLY POINT DETAILS**

Meter Point Reference Number	1026852204	Confirmation Number	
Meter Serial Number			

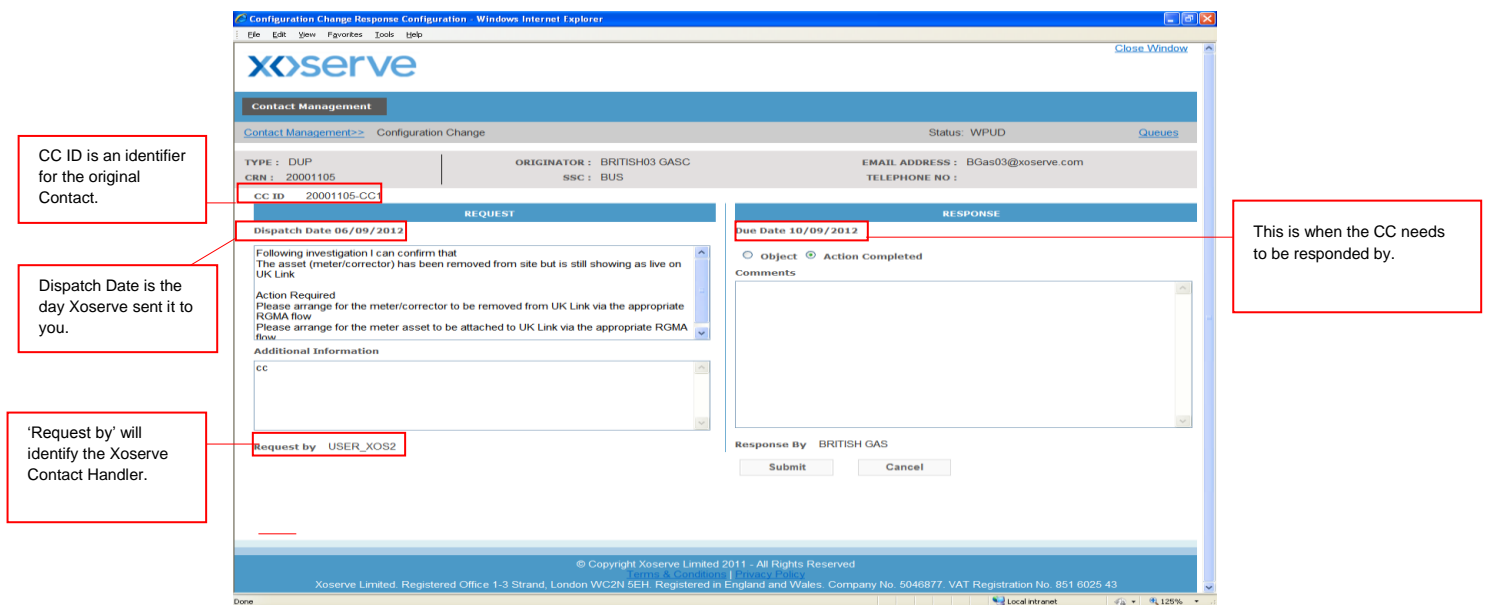
[Continue](#) [Cancel](#)

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Done Local intranet 125%

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

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



Configuration Change Response Configuration - Windows Internet Explorer

**Contact Management**

Contact Management >> Configuration Change Status: WPUD Queues

TYPE : DUP CRN : 20001105 ORIGINATOR : BRITISH03 GASC SSC : BUS EMAIL ADDRESS : BGas03@xoserve.com TELEPHONE NO :

CC ID 20001105-CC1

**REQUEST**

Dispatch Date 06/09/2012

Following investigation I can confirm that The asset (meter/corrector) has been removed from site but is still showing as live on UK Link

Action Required  
Please arrange for the meter/corrector to be removed from UK Link via the appropriate RGMA flow  
Please arrange for the meter asset to be attached to UK Link via the appropriate RGMA flow.

Additional Information  
CC

Request by USER\_XOS2

**RESPONSE**

Due Date 10/09/2012

Object Action Completed

Comments

Response By BRITISH GAS

[Submit](#) [Cancel](#)

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Done Local intranet 125%

CC 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 CC needs to be responded by.



Up to two CC's can be sent per Contact, these will show as CC1 and CC2 on the system.



You will notice that you have the opportunity to Object to our request or tell us that you have completed the Action. It is important that you select one of these two options.

## 5.5 Responding to a Configuration Change Request

### Action Completed

Select the Action Completed Radio button. The comments box is available if you have further comments but it is not mandatory. Once completed click Submit.



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

Configuration Change Response Configuration - Windows Internet Explorer

Close Window

Contact Management

Contact Management -> Configuration Change Status: WPUD Queues

TYPE : DUP ORIGINATOR : BRITISH03 GASC EMAIL ADDRESS : BGas03@xoserve.com  
CRN : 20001105 SSC : BUS TELEPHONE NO :

CC ID : 20001105-CC1

REQUEST

Dispatch Date 06/09/2012

Following investigation I can confirm that  
The asset (meter/corrector) has been removed from site but is still showing as live on  
UK Link

Action Required  
Please arrange for the meter/corrector to be removed from UK Link via the appropriate  
RGMA flow  
Please arrange for the meter asset to be attached to UK Link via the appropriate RGMA  
flow.

Additional Information

cc

Request by : USER\_XOS2

RESPONSE

Due Date 10/09/2012

☐ Object ☒ Action Completed

Comments

Complete

Response By : BRITISH GAS

Submit Cancel

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### Object

Select the Object Radio button. At this time the Comments box becomes mandatory, please update this box with your reasons / comments and click select Submit.

Configuration Change Response Configuration - Windows Internet Explorer

Close Window

Contact Management

Contact Management -> Configuration Change Status: WPUD Queues

TYPE : DUP ORIGINATOR : BRITISH03 GASC EMAIL ADDRESS : BGas03@xoserve.com  
CRN : 20001105 SSC : BUS TELEPHONE NO :

CC ID : 20001105-CC1

REQUEST

Dispatch Date 06/09/2012

Following investigation I can confirm that  
The asset (meter/corrector) has been removed from site but is still showing as live on  
UK Link

Action Required  
Please arrange for the meter/corrector to be removed from UK Link via the appropriate  
RGMA flow  
Please arrange for the meter asset to be attached to UK Link via the appropriate RGMA  
flow.

Additional Information

cc

Request by : USER\_XOS2

RESPONSE

Due Date 10/09/2012

☒ Object ☐ Action Completed

Comments

Object

Response By : BRITISH GAS

Submit Cancel

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

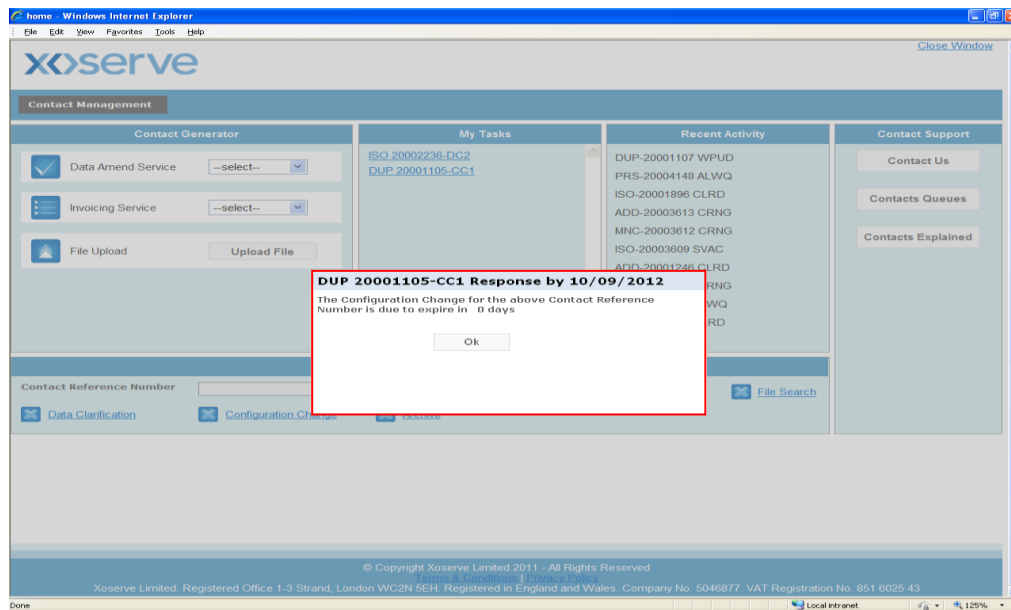


Like a Data Clarification Request, the Configuration Change Request effectively places your original Contact on hold; 'the clock has stopped'. Only when it is returned does the 'clock start' again.

## 5.6 Auto closure of a Configuration Change Request



A Configuration Change will remain open for 40 business days. Each time the Contact is opened you are prompted as to how many days are left on the CC before it is due to expire.



If you do not respond during the 40 days, the Contact will auto close on the system. For the Contact to be resolved a new Contact will need to be raised with the requested action completed from the CC.



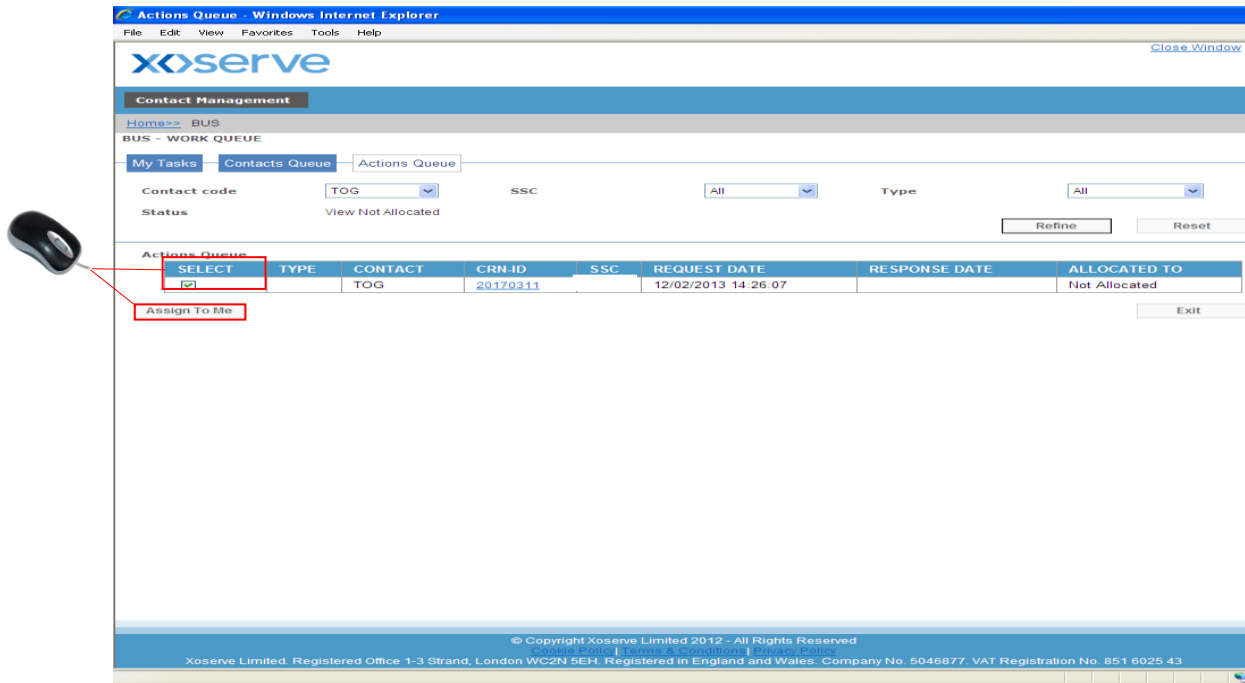
The maximum elapsed time for a Configuration Change stage is 40 business days. In this respect if a second Configuration Change is sent at any point within this time then it will remain valid for the remaining portion of the 40 days.

E.g. CC1 returned to Xoserve after 25 days since dispatch date

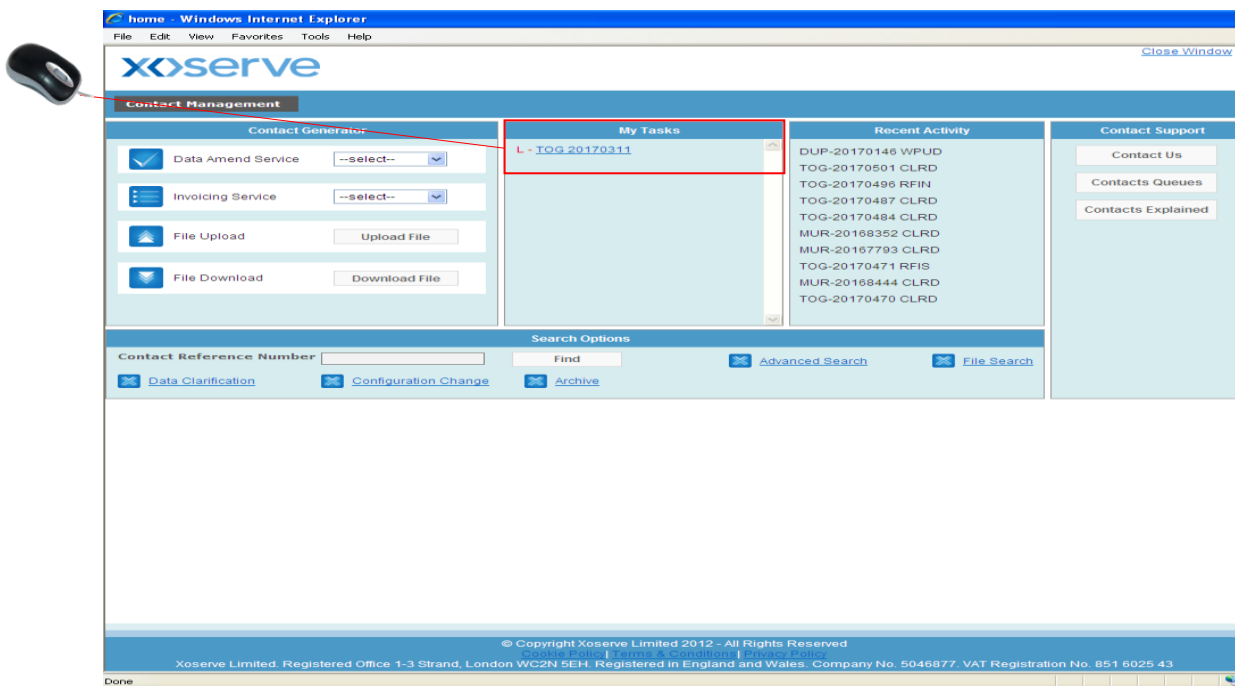
CC2 sent on day 25 therefore 15 business days will remain

## 5.7 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 the relevant **ToG** contact, then click 'Assign To Me'



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



## 5.7 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'.

TOG - Windows Internet Explorer

File Edit View Favorites Tools Help

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

**Contact Management**

[Home>>](#) TOG - RFI Status: RFIS [Queues](#)

TYPE : TOG ORIGINATOR : SSC : EMAIL ADDRESS :  
CRN : 20170311 TELEPHONE NO :

[View Contact Details](#)

TOG Investigation Outcome \* --Select--  
Type of Theft --Select--  
TOG Start Date  
TOG End Date  
Estimated Calculation of Gas [kWh]  
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

Engineer's Report

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Done

## 5.8 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

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

NB - Large Supply Points **only** will be Invoiced

### 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: RFIS Queues

TYPE : TOG ORIGINATOR : EMAIL ADDRESS :  
CRN : 20170311 SSC : TELEPHONE NO :

TOG Investigation Outcome \* Valid TOG  
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  
Engineer's Report \*

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

Submit Cancel

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## 5.9 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 a web browser window titled "SearchViewForm - Windows Internet Explorer". The page is the "Contact Management" interface for Xoserve. At the top, there's a navigation bar with "Home" and "Queues" links. The main header displays "Contact Management" and "Status: CLRD". Below this, a summary bar shows "TYPE : TOG", "CRN : 20168939", "ORIGINATOR : EAMONN DARCY", "SSC : BUS", "EMAIL ADDRESS : Eamonn.Darcy@Nationalgrid.com", and "TELEPHONE NO :".

The "Contact Information" tab is selected, showing details for "TOG Investigation". The form is divided into two main sections. The left section contains fields for "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), and "Postcode" (GL52 3PN). The right section contains "Required Emergency Job?" (radio buttons for Yes and No, with No selected), "Job Number", "Type of Theft (Allegation)" (a dropdown menu showing "Tampered Meter Index"), and "TOG Allegation Description" (a large text area).

Below the form, there is a "Resolution Comments" section. A red box highlights 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." At the bottom of this section are "Ok" and "Challenge Resolution" buttons.

The footer of the page 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".



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# **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 in a Windows Internet Explorer browser. The contact details for ISO CRN 20003802 are displayed, including the originator (BRITISH04 GASD), status (CLRD), and email address (BGas04@xoserve.com). The contact explanation field contains a message: "With reference to your contact, I am pleased to inform you that your request has been actioned. I have updated the meter point status on our source systems. Thank you for raising this contact and I hope it is resolved to your satisfaction." A red box highlights this message, and a red line points to a text box on the right that says "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 in a Windows Internet Explorer browser. The contact details for ISO CRN 20003792 are displayed, including the originator (BRITISH02 GA), status (CLRD), and email address (BGas02@xoserve.com). The contact explanation field contains a message: "With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. Investigation has confirmed the service is live. No amendment is required to our source systems." A red box highlights this message, and a red line points to a text box on the right that says "This part tells you why your Contact was not upheld."

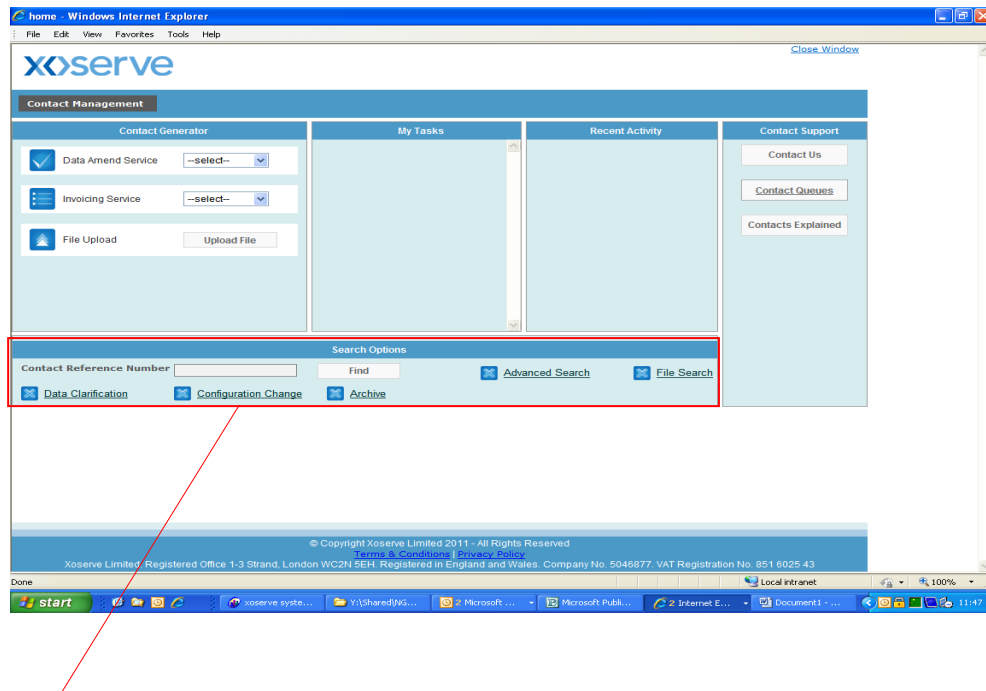
# **Section 7**

## **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 six 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

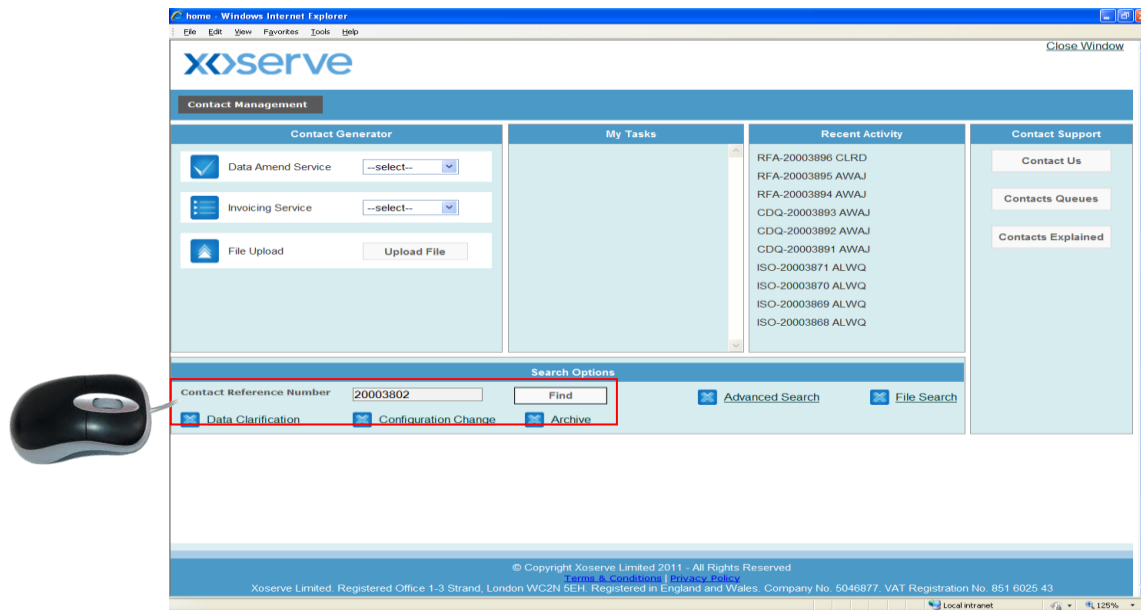
Data Clarification Search – Searching for a Contact currently at DC status or has passed through the DC status.

Configuration Change Search – Searching for a Contact currently at CC status or has passed through the CC status.

Archive Search – Searching for a Contact raised on a previous Query Management system ConQuest.

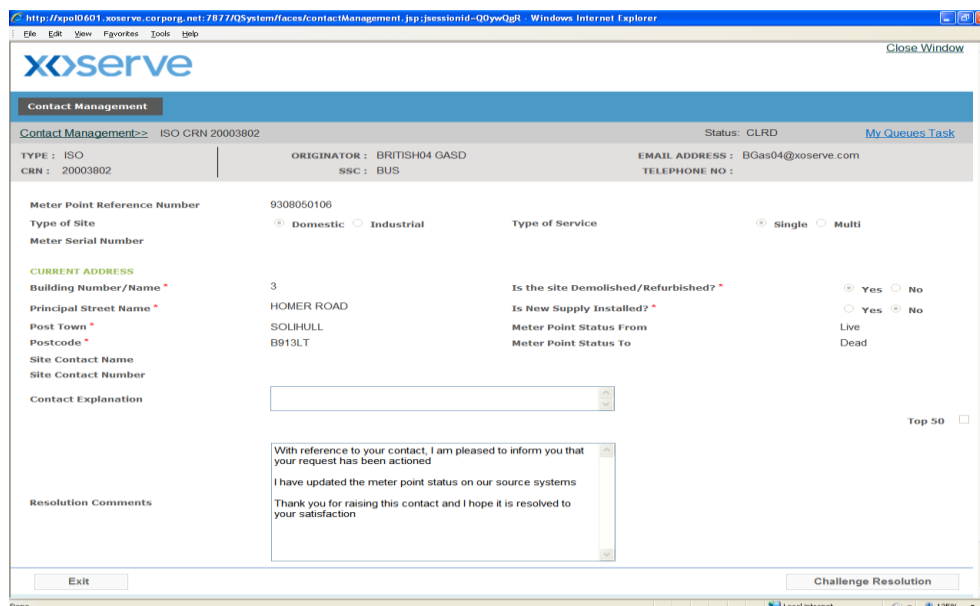
## 7.2 Basic Search

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 in a Windows Internet Explorer browser. The interface has a blue header with the Xserve logo. Below the header, there are four main sections: Contact Generator, My Tasks, Recent Activity, and Contact Support. The Contact Generator section includes a 'Data Amend Service' dropdown, an 'Invoicing Service' dropdown, and a 'File Upload' button. The My Tasks section is empty. The Recent Activity section lists several contacts with their CRN numbers and status. The Contact Support section includes 'Contact Us', 'Contacts Queues', and 'Contacts Explained' links. A red box highlights the 'Search Options' section, which contains a 'Contact Reference Number' input field with the value '20003802', a 'Find' button, and three checkboxes: 'Data Clarification', 'Configuration Change', and 'Archive'. A mouse cursor is pointing at the 'Find' button. The footer of the page contains copyright information for Xserve Limited, 2011.

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



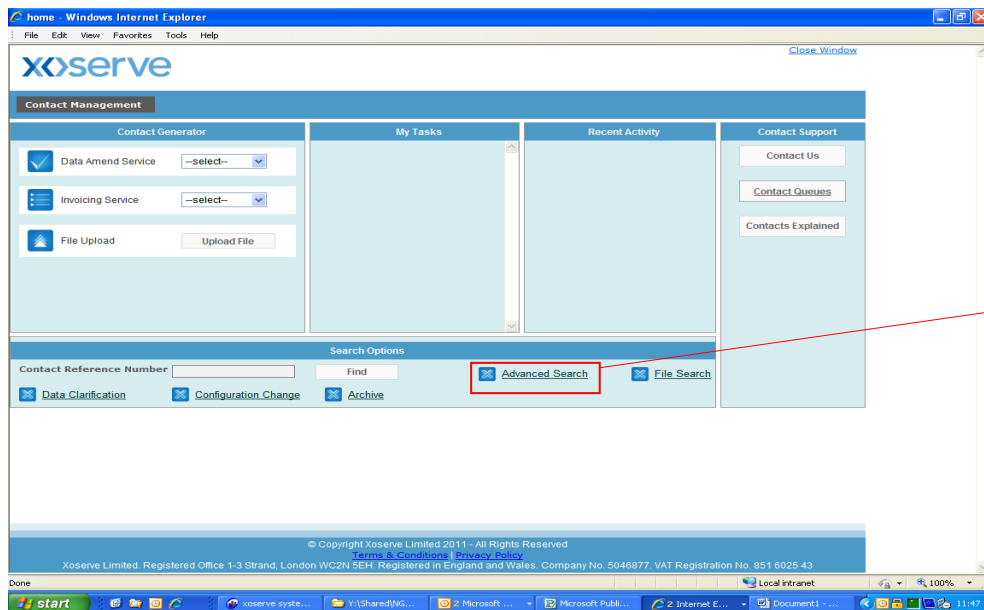
The screenshot shows the Xserve Contact Management interface displaying the details of a specific contact. The contact is identified by its CRN, 20003802, and its status is CLRD. The interface is divided into several sections: 'Contact Management' (with a link to 'My Queues Task'), 'Contact Details' (showing TYPE: ISO, CRN: 20003802, ORIGINATOR: BRITISH04 GASD, SSC: BUS, EMAIL ADDRESS: BGas04@xserve.com, and TELEPHONE NO:), 'Meter Point Reference Number' (9308050106), 'Type of Site' (Domestic selected, Industrial unselected), 'Type of Service' (Single selected, Multi unselected), 'CURRENT ADDRESS' (Building Number/Name: 3, Principal Street Name: HOMER ROAD, Post Town: SOLIHULL, Postcode: B913LT), 'Is the site Demolished/Refurbished?' (Yes selected, No unselected), 'Is New Supply Installed?' (Yes selected, No unselected), 'Meter Point Status From' (Live selected, Dead unselected), 'Contact Explanation' (a text area), 'Resolution Comments' (a text area with the text: 'With reference to your contact, I am pleased to inform you that your request has been actioned. I have updated the meter point status on our source systems. Thank you for raising this contact and I hope it is resolved to your satisfaction'), and 'Exit' and 'Challenge Resolution' buttons. The footer of the page contains copyright information for Xserve Limited, 2011.



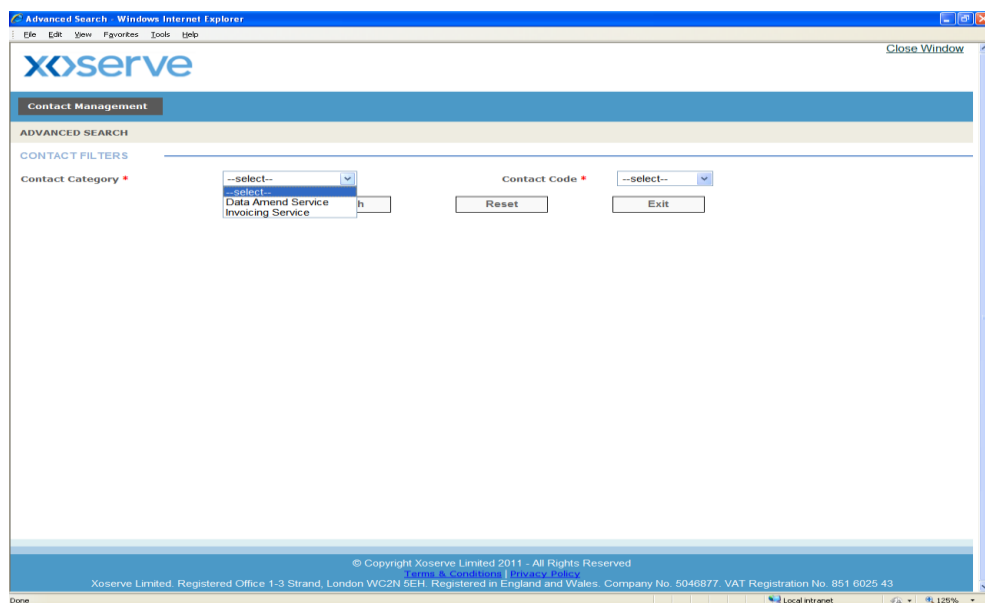
You can not edit this Contact; it is read only.

## 7.3 Advanced Search

To retrieve information on Contacts, click Advanced Search.



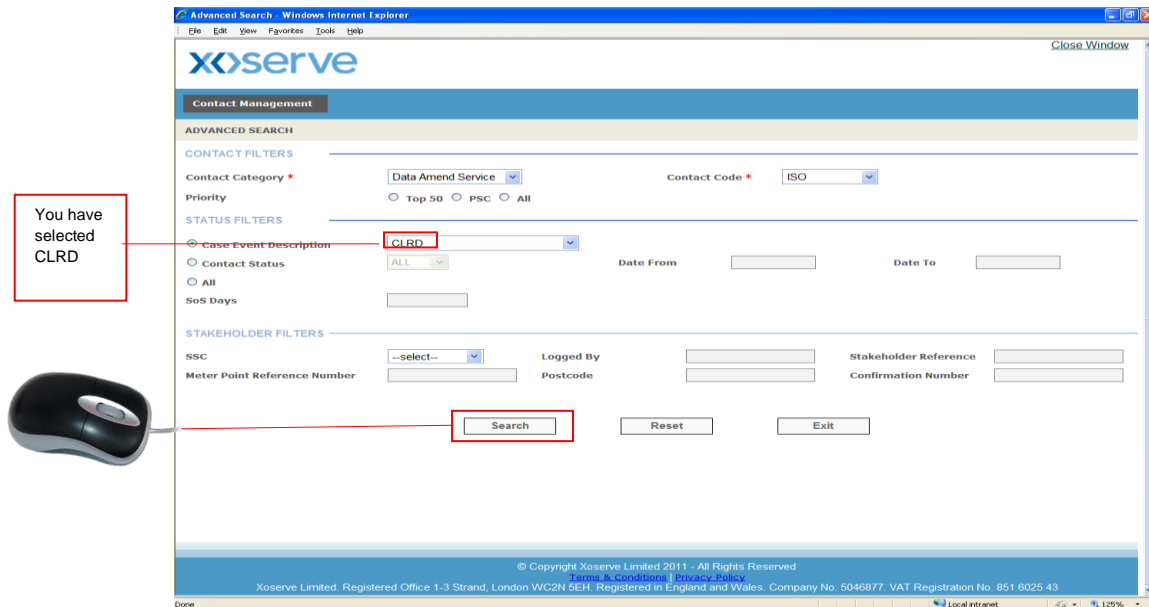
You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.



## 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 CLRD



Advanced Search - Windows Internet Explorer

**Xoserve**

Contact Management

ADVANCED SEARCH

CONTACT FILTERS

Contact Category \* Data Amend Service

Contact Code \* ISO

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

Stakeholder Reference

Confirmation Number

Search Reset Exit

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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?

Search Result - Windows Internet Explorer

**Xoserve**

Contact Management

SEARCH CRITERIA

CONTACT STATUS PRIORITY

CASE EVENT DESCRIPTION

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 Id	Closed Date
20001540	ISO	9144278407		GLC	UB34NS	CLRD	23/05/2012	23/05/2012	HI		0	CRG	23/05/2012
20001541	ISO	9184104510		GLC	YO112PR	CLRD	23/05/2012	23/05/2012	HI		0	CRG	23/05/2012
20001516	ISO	16770210		GLC	B277XY	CLRD	30/05/2012	22/05/2012	HI		6	CRG	30/05/2012

Exit

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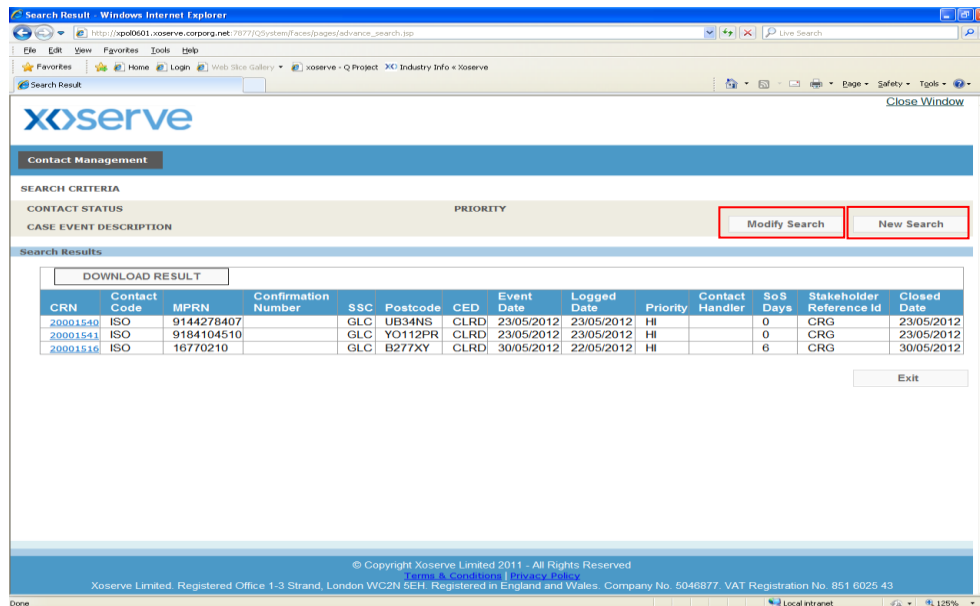
Xoserve Limited. Registered Office 1-3 Strand, London WC2N 5EH. Registered in England and Wales. Company No. 5046877. VAT Registration No. 851 6025 43

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.



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

**CONTACT FILTERS**

Contact Category: Data Amend Service  
Contact Code: ISO  
Priority: ☐ Top 50 ☐ PSC ☐ All

**STATUS FILTERS**

Case Event Description: CLRD  
Contact Status: ALL  
Date From:  Date To:   
SoS Days:

**STAKEHOLDER FILTERS**

SSC: --select--  
Meter Point Reference Number:   
Logged By:   
Postcode:   
Stakeholder Reference:   
Confirmation Number:

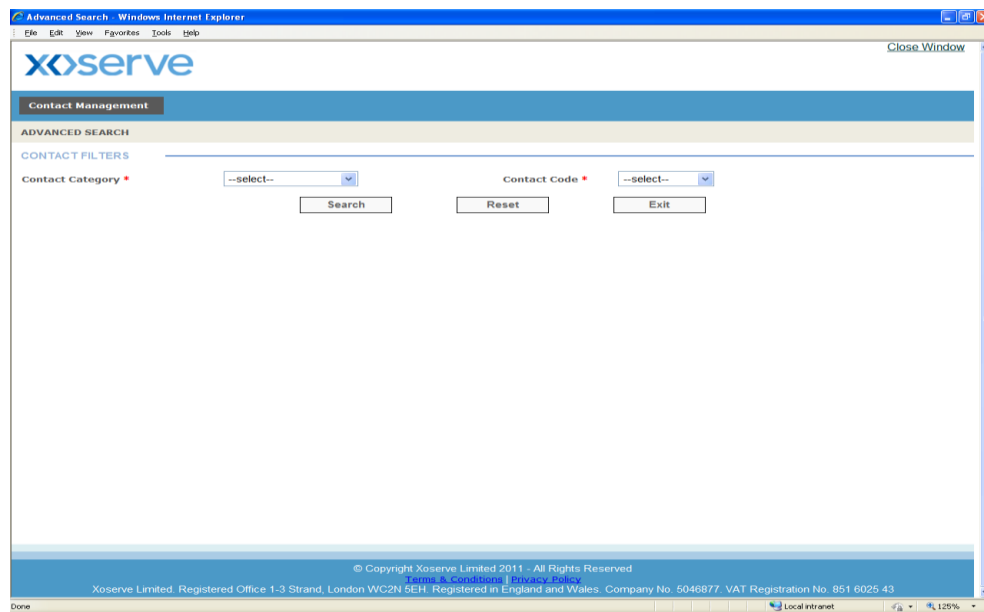
Search Reset Exit



## 7.3 Advanced Search

### New Search

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



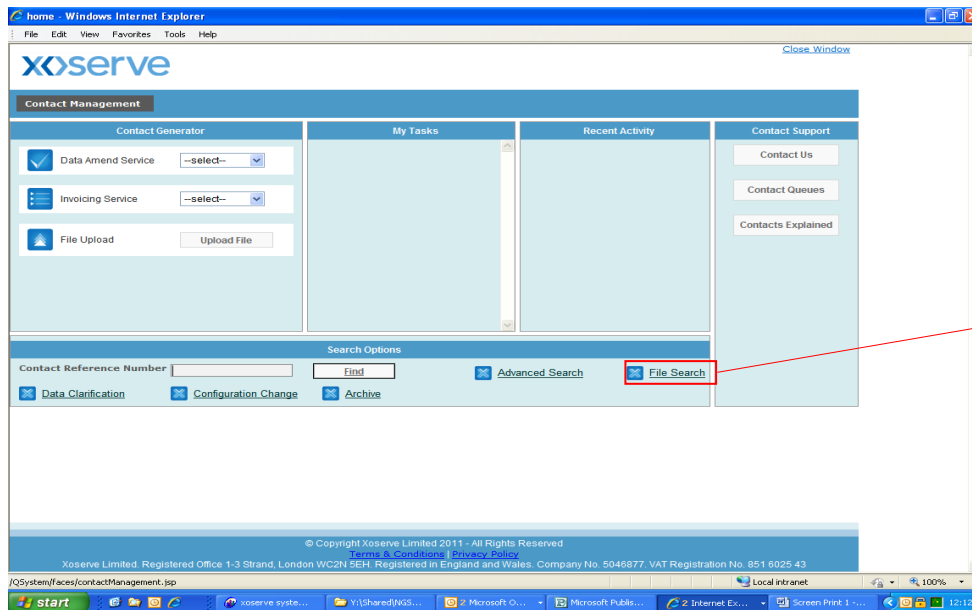
The screenshot shows a web browser window titled "Advanced Search - Windows Internet Explorer". The page features the Xoserve logo at the top left. Below the logo is a navigation bar with "Contact Management" and "ADVANCED SEARCH" tabs. The "ADVANCED SEARCH" tab is active. Under the "CONTACT FILTERS" section, there are two dropdown menus: "Contact Category" and "Contact Code", both currently set to "--select--". Below these dropdowns are three buttons: "Search", "Reset", and "Exit". At the bottom of the page, there is a copyright notice: "© 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." The browser's status bar at the bottom shows "Done", "Local intranet", and a zoom level of "125%".



You will need to repeat the selection step demonstrated on page 42. To pick a Contact Category and the Contact Code you require.

## 7.4 File Search

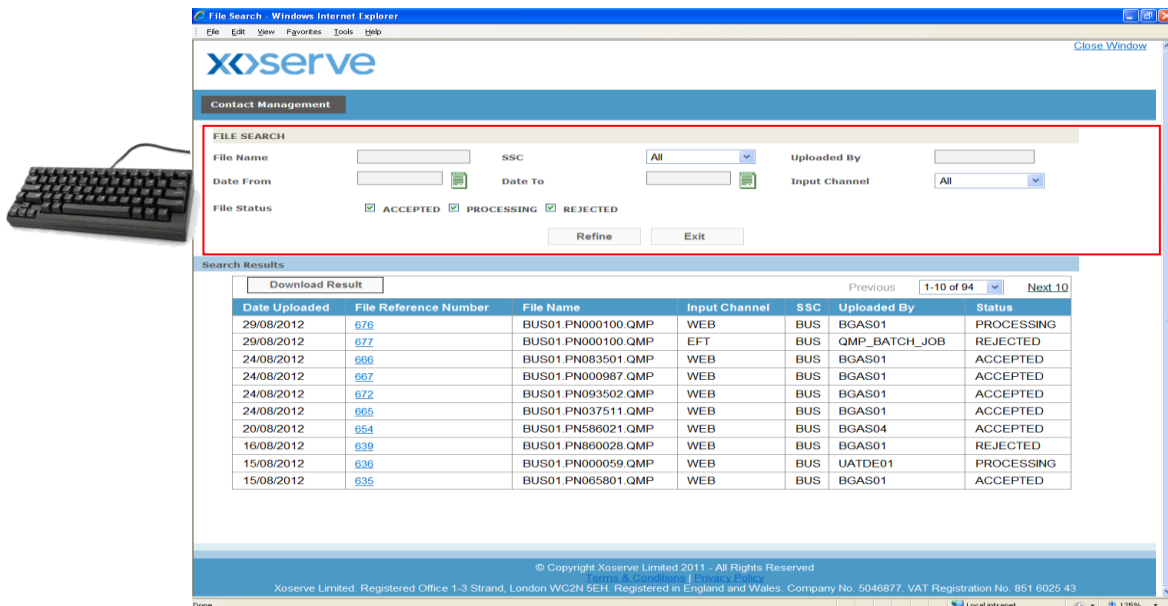
To retrieve information on files you have submitted to Xoserve, click on 'File Search'.



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.

## 7.4 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.

**File Search - Windows Internet Explorer**

**xxserve**

**Contact Management**

**FILE SEARCH**

File Name:  SSC:  All  Uploaded By:

Date From:  Date To:  Input Channel:

File Status: ☒ ACCEPTED ☐ PROCESSING ☐ REJECTED

**Search Results**

Previous 1-10 of 69 Next 10

Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
24/08/2012	<a href="#">666</a>	BUS01.PN083501.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	<a href="#">667</a>	BUS01.PN000987.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	<a href="#">672</a>	BUS01.PN093502.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	<a href="#">685</a>	BUS01.PN037511.QMP	WEB	BUS	BGAS01	ACCEPTED
20/08/2012	<a href="#">654</a>	BUS01.PN586021.QMP	WEB	BUS	BGAS04	ACCEPTED
15/08/2012	<a href="#">635</a>	BUS01.PN065801.QMP	WEB	BUS	BGAS01	ACCEPTED
14/08/2012	<a href="#">626</a>	BUS01.PN444485.QMP	WEB	BUS	BGAS04	ACCEPTED
14/08/2012	<a href="#">627</a>	BUS01.PN444486.QMP	WEB	BUS	BGAS04	ACCEPTED
13/08/2012	<a href="#">615</a>	BUS01.PN860019.QMP	WEB	BUS	BGAS04	ACCEPTED
13/08/2012	<a href="#">614</a>	BUS01.PN860016.QMP	WEB	BUS	BGAS04	ACCEPTED

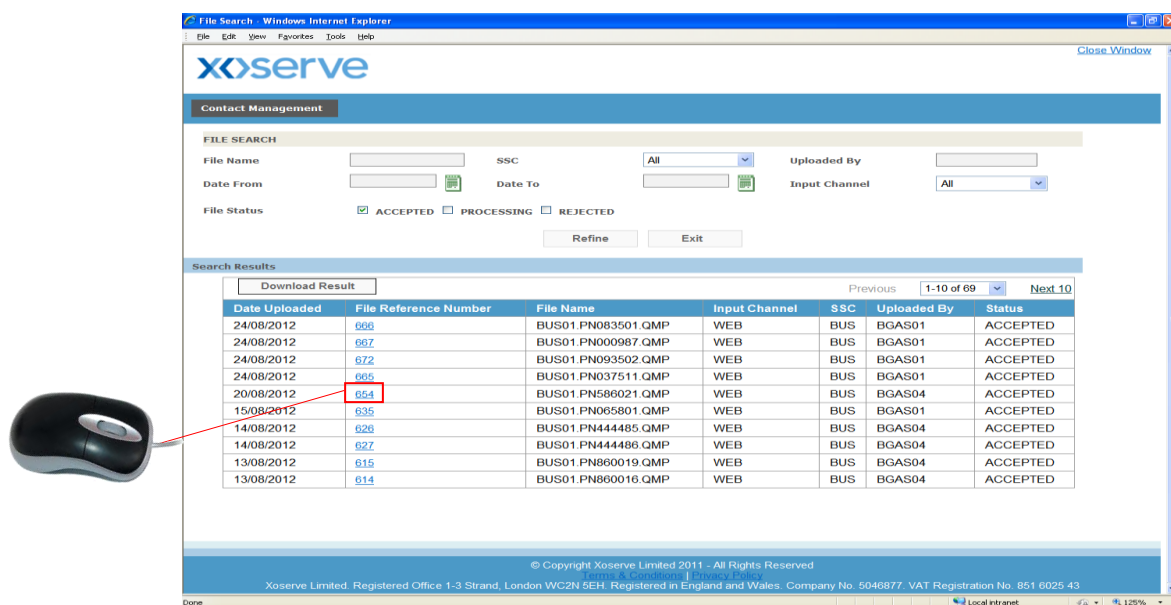
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For the criteria selected above in the above screen the results show all files at 'Accepted' status. The following will appear.



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 it was attempted to be sent.

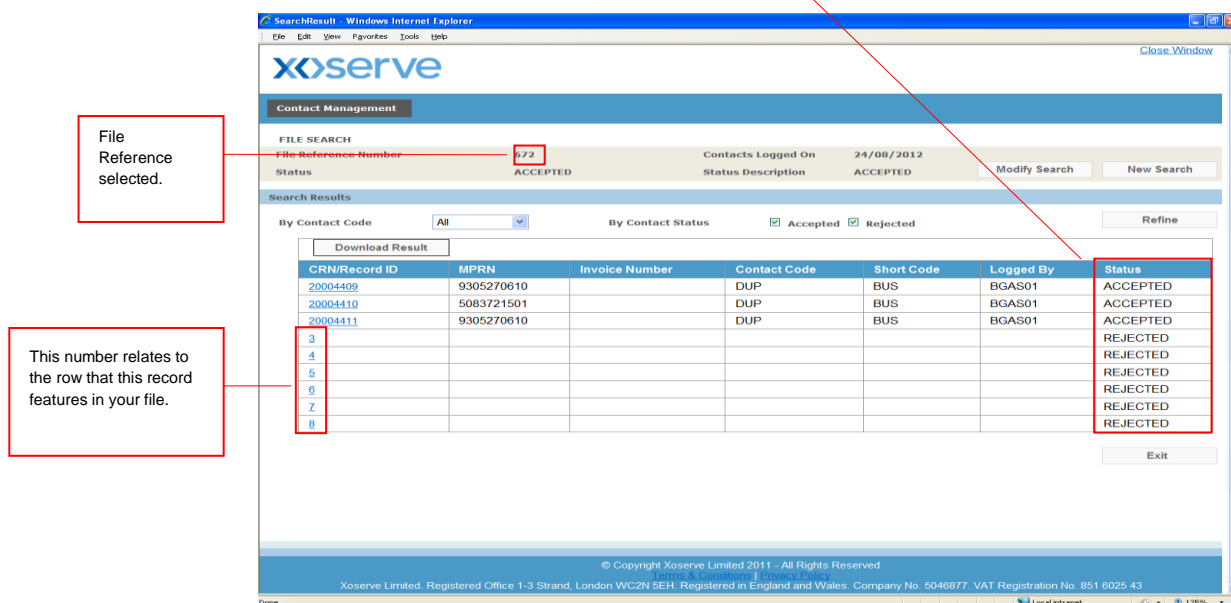
## 7.4 File Search



The screenshot shows the Xserve File Search interface. The 'Search Results' section displays a table with the following columns: Date Uploaded, File Reference Number, File Name, Input Channel, SSC, Uploaded By, and Status. The table lists several records, with the 'File Reference Number' column highlighted by a red box and a mouse cursor pointing to it.

Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
24/08/2012	666	BUS01.PN083501.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	667	BUS01.PN000987.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	672	BUS01.PN093502.QMP	WEB	BUS	BGAS01	ACCEPTED
24/08/2012	665	BUS01.PN037511.QMP	WEB	BUS	BGAS01	ACCEPTED
20/08/2012	654	BUS01.PN586021.QMP	WEB	BUS	BGAS04	ACCEPTED
15/08/2012	635	BUS01.PN065801.QMP	WEB	BUS	BGAS01	ACCEPTED
14/08/2012	626	BUS01.PN444485.QMP	WEB	BUS	BGAS04	ACCEPTED
14/08/2012	627	BUS01.PN444486.QMP	WEB	BUS	BGAS04	ACCEPTED
13/08/2012	615	BUS01.PN860019.QMP	WEB	BUS	BGAS04	ACCEPTED
13/08/2012	614	BUS01.PN860016.QMP	WEB	BUS	BGAS04	ACCEPTED

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

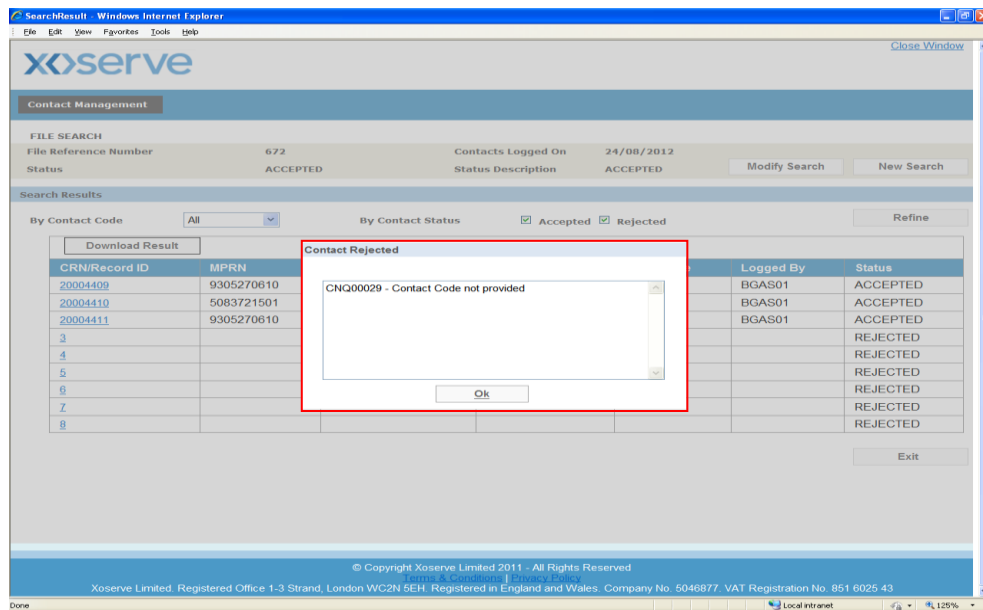


The screenshot shows the Xserve SearchResult interface. The 'Search Results' section displays a table with the following columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. The 'File Reference Number' column is highlighted by a red box, and the 'CRN/Record ID' column is also highlighted by a red box. A red box also highlights the 'Status' column.

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20004409	9305270610		DUP	BUS	BGAS01	ACCEPTED
20004410	5083721501		DUP	BUS	BGAS01	ACCEPTED
20004411	9305270610		DUP	BUS	BGAS01	ACCEPTED
3						REJECTED
4						REJECTED
5						REJECTED
6						REJECTED
7						REJECTED
8						REJECTED

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.

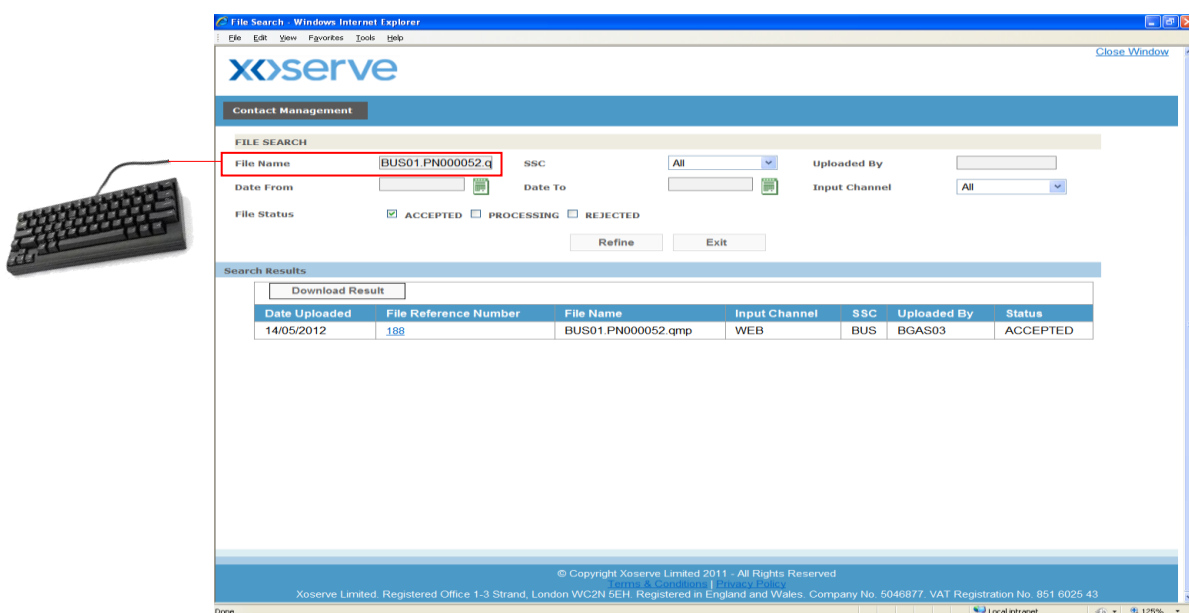
To complete a search using a specific file name

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows....

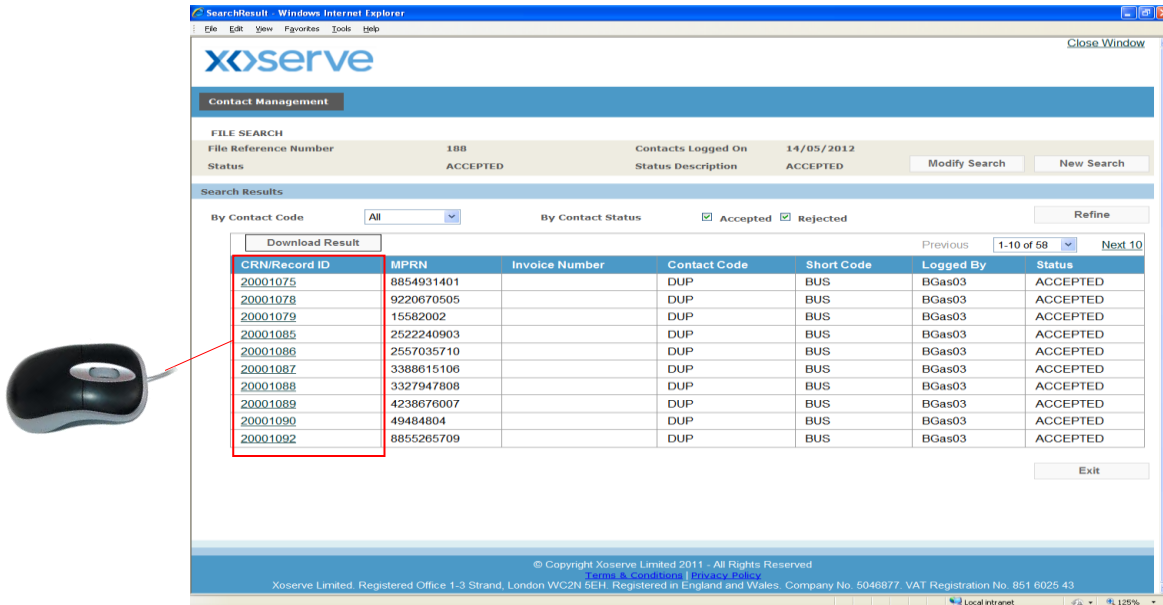


One of the File Status's must be selected in order for the search to bring back the appropriate results.

## 7.4 File Search

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

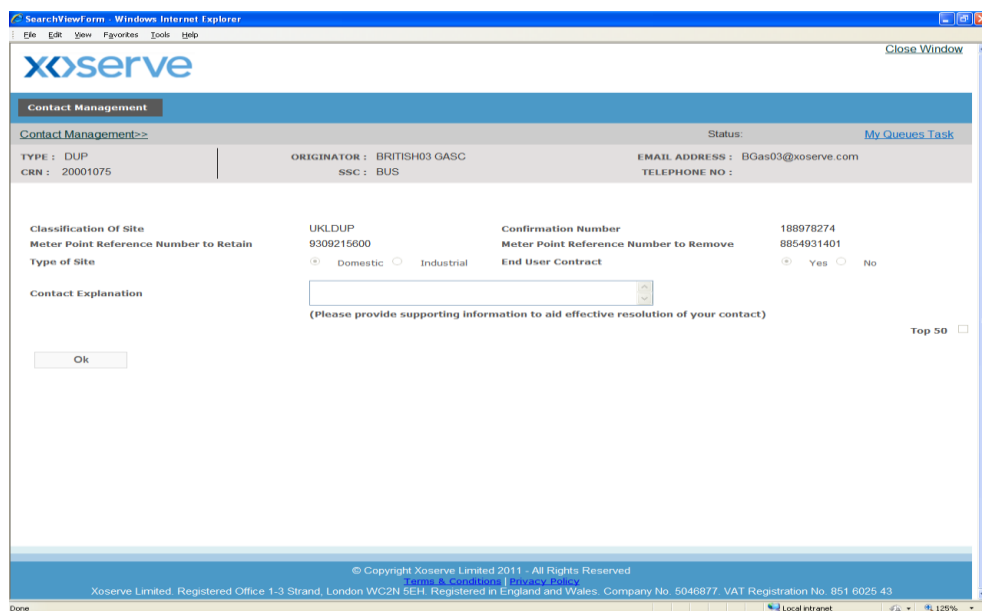
To drill down further, click on a specific Contact.



The screenshot shows the Xoserve SearchResults page in a Windows Internet Explorer browser. The page has a blue header with the Xoserve logo and a 'Close Window' button. Below the header is a 'Contact Management' section with a 'FILE SEARCH' tab. The search criteria are: File Reference Number: 188, Status: ACCEPTED, Contacts Logged On: 14/05/2012, Status Description: ACCEPTED. There are buttons for 'Modify Search' and 'New Search'. Below the search criteria is a 'Search Results' section. It has a 'By Contact Code' dropdown set to 'All' and a 'By Contact Status' section with checkboxes for 'Accepted' and 'Rejected'. There is a 'Refine' button. Below these is a 'Download Result' button and a table of search results. The table has columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. The first row of the table is highlighted with a red box, and a mouse cursor points to it. The table shows 10 records, all with a status of 'ACCEPTED'. The footer of the page contains copyright information for Xoserve Limited 2011.

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20001075	8854931401		DUP	BUS	BGas03	ACCEPTED
20001078	9220670505		DUP	BUS	BGas03	ACCEPTED
20001079	15582002		DUP	BUS	BGas03	ACCEPTED
20001085	2522240903		DUP	BUS	BGas03	ACCEPTED
20001086	2557035710		DUP	BUS	BGas03	ACCEPTED
20001087	3388615106		DUP	BUS	BGas03	ACCEPTED
20001088	3327947808		DUP	BUS	BGas03	ACCEPTED
20001089	4238676007		DUP	BUS	BGas03	ACCEPTED
20001090	49484804		DUP	BUS	BGas03	ACCEPTED
20001092	8855265709		DUP	BUS	BGas03	ACCEPTED

The Accepted Contact will appear as follows....



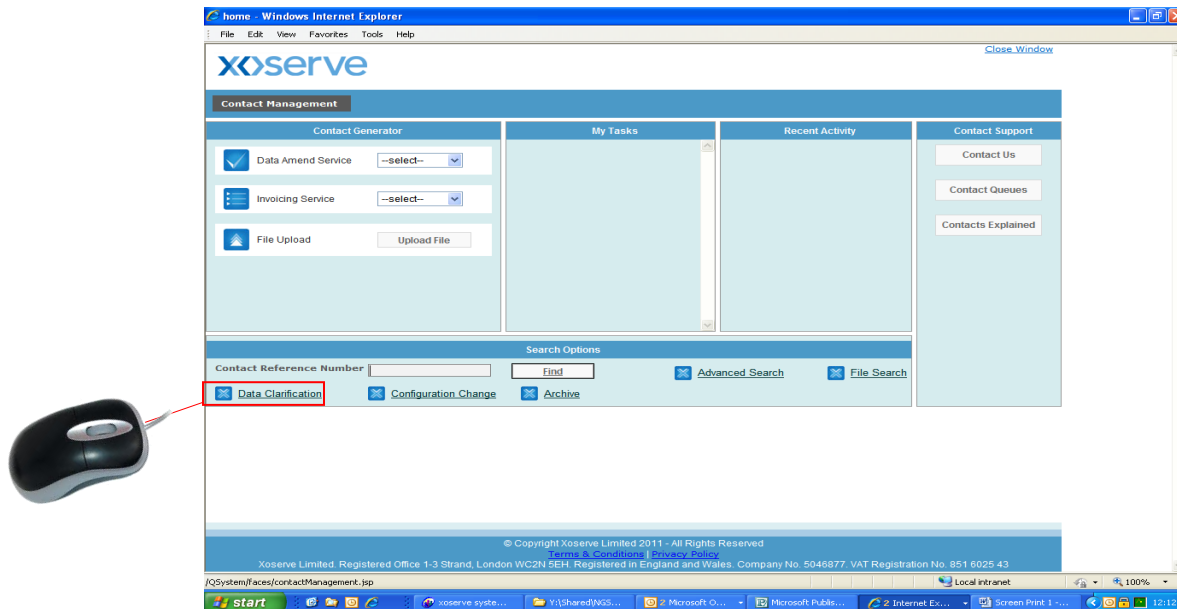
The screenshot shows the Xoserve SearchViewForm page in a Windows Internet Explorer browser. The page has a blue header with the Xoserve logo and a 'Close Window' button. Below the header is a 'Contact Management' section with a 'Contact Management>>' link. The contact details are displayed in a table. The contact is a 'DUP' with CRN: 20001075. The originator is 'BRITISH03 GASC' and the SSC is 'BUS'. The email address is 'BGas03@xoserve.com' and the telephone number is not provided. Below the contact details is a 'Classification Of Site' section with a 'Meter Point Reference Number to Retain' and a 'Type Of Site' dropdown. The 'Type Of Site' is set to 'Domestic'. There is a 'Contact Explanation' section with a text area and a 'Please provide supporting information to aid effective resolution of your contact' note. There is an 'Ok' button. The footer of the page contains copyright information for Xoserve Limited 2011.

TYPE :	ORIGINATOR :	EMAIL ADDRESS :
DUP	BRITISH03 GASC	BGas03@xoserve.com
CRN :	SSC :	TELEPHONE NO :
20001075	BUS	

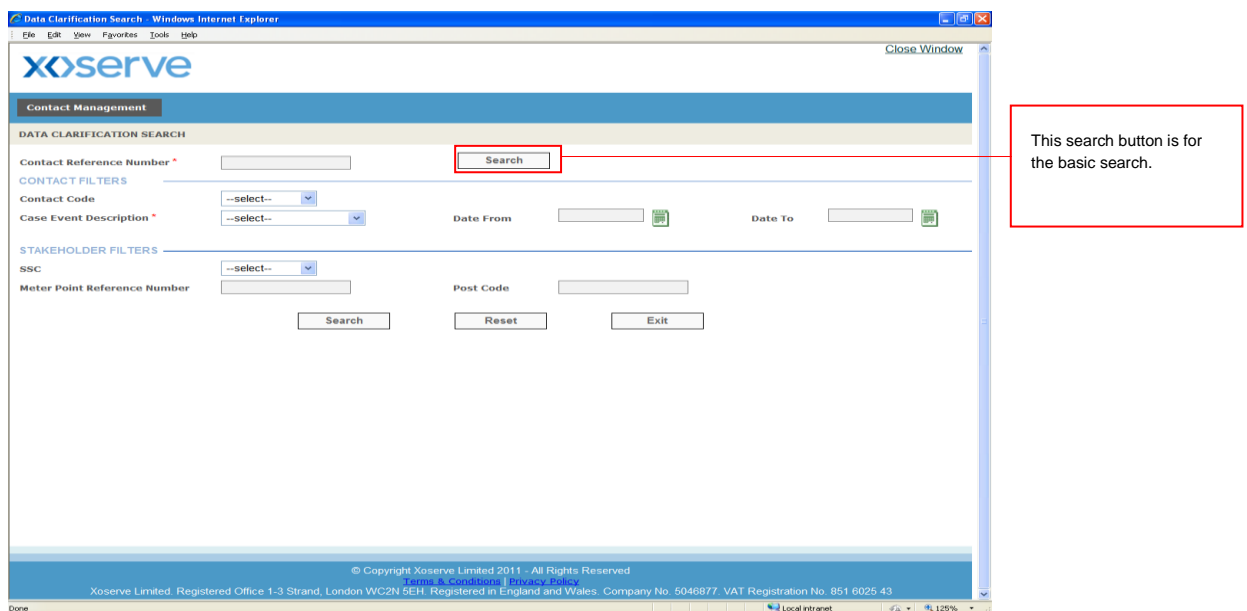
Classification Of Site: UKLDUP  
Meter Point Reference Number to Retain: 9309215000  
Type Of Site: Domestic  
Confirmation Number: 188978274  
Meter Point Reference Number to Remove: 8854931401  
End User Contract: Yes  
Contact Explanation: (Please provide supporting information to aid effective resolution of your contact)

## 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. 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.

Configuration Change Search - Windows Internet Explorer

**xoserve**

Contact Management

CONFIGURATION CHANGE SEARCH

Contact Reference Number \* 20001068 Search

CONTACT FILTERS

Contact Code --select--

Case Event Description \* --select--

Date From Date To

STAKEHOLDER FILTERS

SSC --select--

Meter Point Reference Number Post Code

Search Reset Exit

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The results will be displayed as follows....

Search Result - Windows Internet Explorer

**xoserve**

Contact Management

SEARCH CRITERIA

CONTACT STATUS PRIORITY

CASE EVENT DESCRIPTION Modify Search New Search

Search Results

Download Result

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference Id	Closed Date	Requested Date	Response Date
20001996	ISO	BUS	ADCF	28/5/2012	28/5/2012	HI		0	BUS		28/5/2012	

Exit

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Select the CRN and the Data Clarification form will appear.



## 7.5 Data Clarification Search

### 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 --select--

Case Event Description \* ADCF

Date From  Date To

STAKEHOLDER FILTERS

SSC --select--

Meter Point Reference Number  Post Code

Search Reset Exit

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The result will be displayed as follows....

SEARCH CRITERIA

CONTACT STATUS CONTACT STATUS PRIORITY

CASE EVENT DESCRIPTION ADCF Modify Search New Search

Search Results

Download Result

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference Id	Closed Date	Requested Date	Response Date
20001996	ISO	BUS	ADCF	28/5/2012	28/5/2012	HI		0	BUS		28/5/2012	
20001998	ISO	BUS	ADCF	28/5/2012	28/5/2012	HI		0	BUS		28/5/2012	
20001999	ISO	BUS	ADCF	28/5/2012	28/5/2012	HI		0	BUS		28/5/2012	

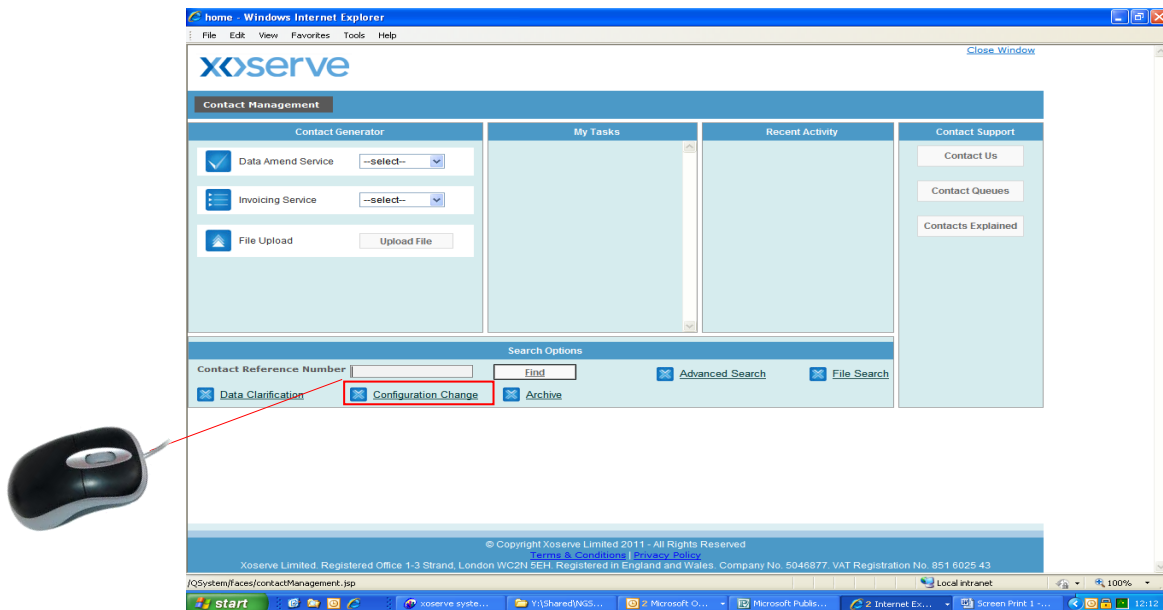
Exit

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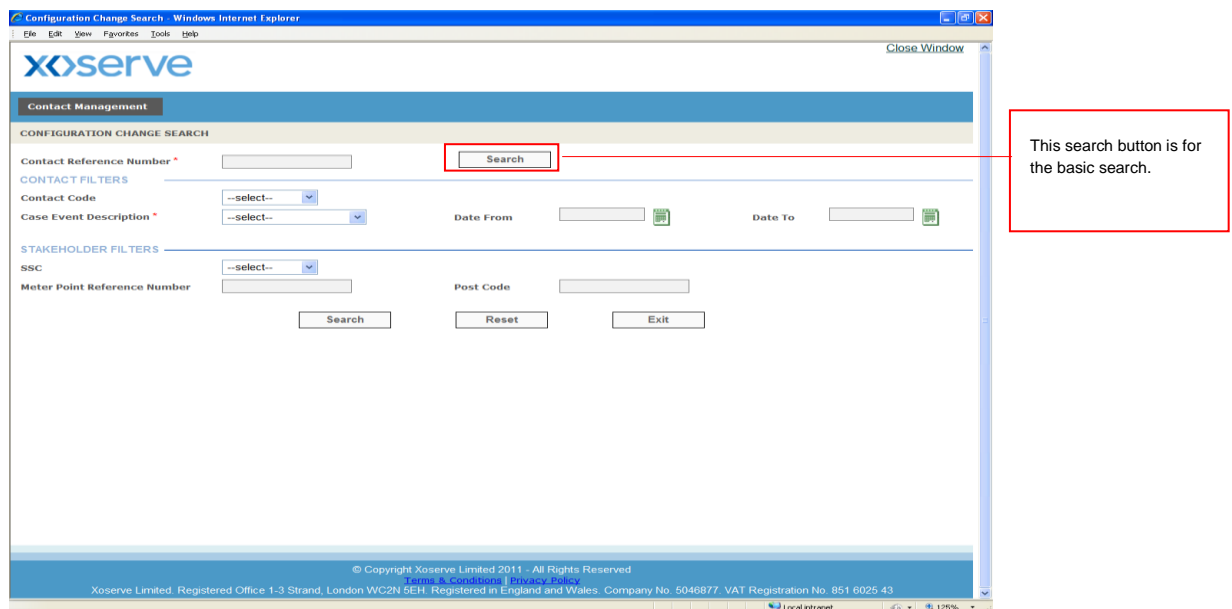
Select the CRN and the Data Clarification will appear.

## 7.6 Configuration Change Search

To complete a Configuration Change search, click on Configuration Change on the Contact Management home page.



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



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

## 7.6 Configuration Change Search

### Basic Search

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

Step 2 – Click Search

Configuration Change Search - Windows Internet Explorer

**xoserve**

Close Window

Contact Management

CONFIGURATION CHANGE 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 result will be displayed as follows....

Search Result - Windows Internet Explorer

**xoserve**

Close Window

Contact Management

SEARCH CRITERIA

CONTACT STATUS

CASE EVENT DESCRIPTION

Search Results

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference Id	Closed Date	Requested Date	Response Date
20001068	DUP	BUS	WPUD	24/5/2012	14/5/2012	LO		8			24/5/2012	

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Select the CRN and the Configuration Change will appear.

## 7.6 Configuration Change Search

### Filters 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 CC outstanding with your organisation or a CC at WPUT status which is a CC with a Third party Shipper.

Configuration Change Search - Windows Internet Explorer

Close Window

**Contact Management**

CONFIGURATION CHANGE SEARCH

Contact Reference Number \*  Search

CONTACT FILTERS

Contact Code --select--

Case Event Description \* WPUD Date From  Date To

STAKEHOLDER FILTERS

SSC --select--

Meter Point Reference Number  Post Code

Search Reset Exit

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The result will be displayed as follows....

Search Result - Windows Internet Explorer

Close Window

**Contact Management**

SEARCH CRITERIA

CONTACT STATUS CONTACT STATUS

CASE EVENT DESCRIPTION WPUD

Modify Search New Search

Search Results

Download Result

CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference Id	Closed Date	Requested Date	Response Date
20001068	DUP	BUS	WPUD	24/5/2012	14/5/2012	LO		8			24/5/2012	
20000742	DUP	BUS	WPUD	14/5/2012	8/5/2012	LO		4			10/5/2012	
20001232	DUP	BUS	WPUD	17/5/2012	16/5/2012	LO		1			17/5/2012	2/8/2012
20001030	DUP	BUS	WPUD	17/5/2012	14/5/2012	LO		3			17/5/2012	
20001478	DUP	BUS	WPUD	24/5/2012	21/5/2012	LO		3			24/5/2012	
20000155	DUP	BUS	WPUD	16/5/2012	18/4/2012	LO		19			16/5/2012	

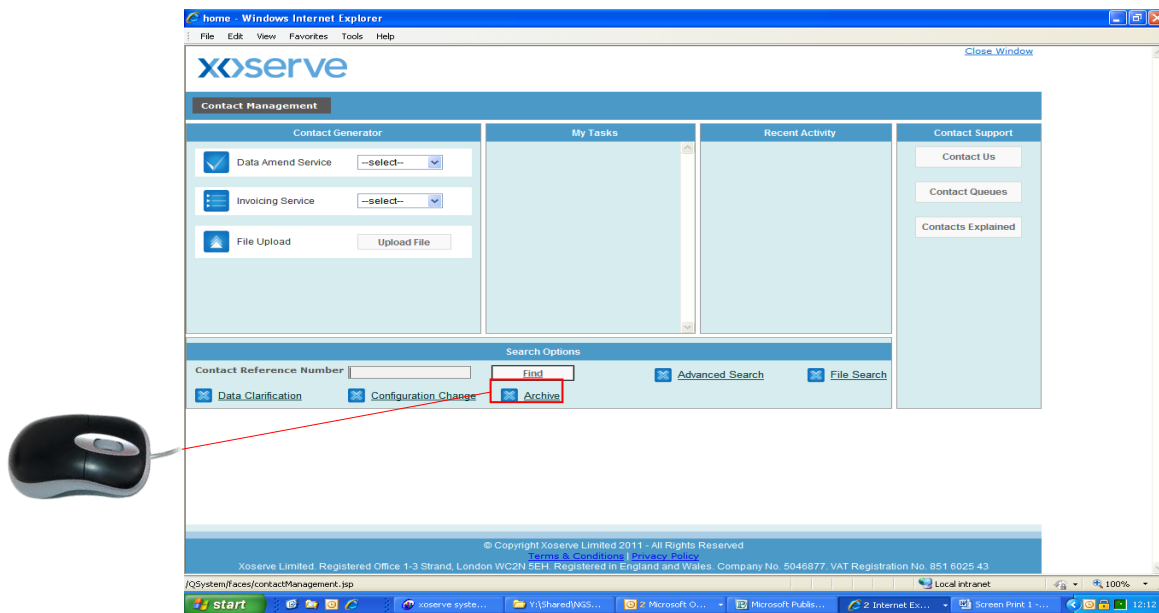
Exit

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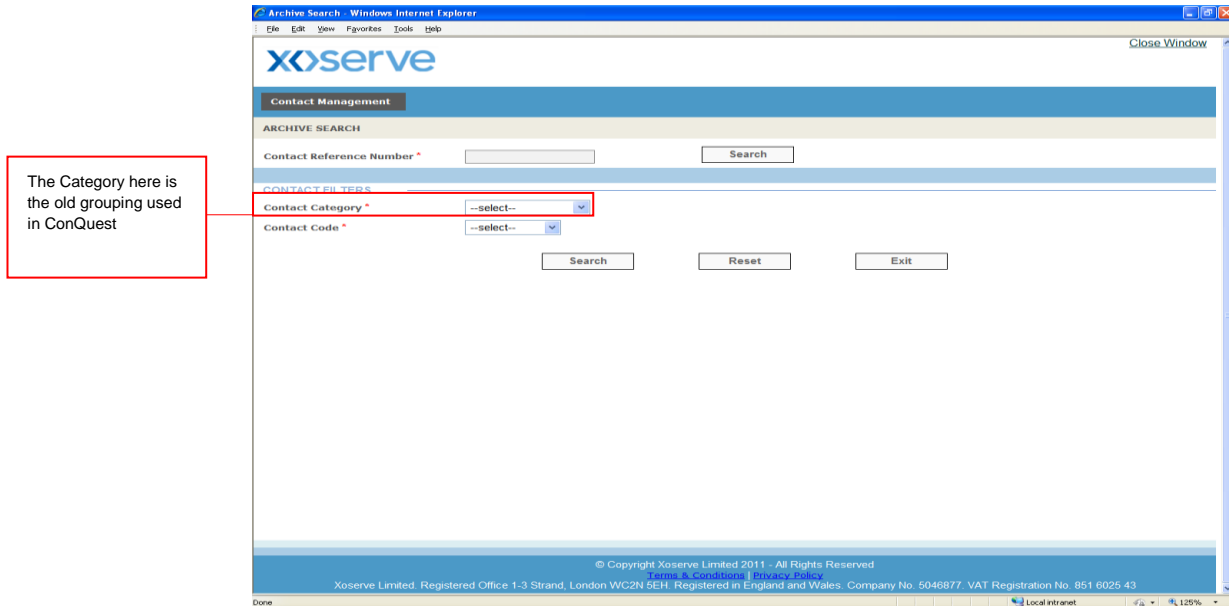
Select the CRN and the Configuration Change will appear.

## 7.7 Archive Search

Archive Search is available to search for any closed Contacts that were raised on the previous system ConQuest. Click on Archive on the Contact Management home page.



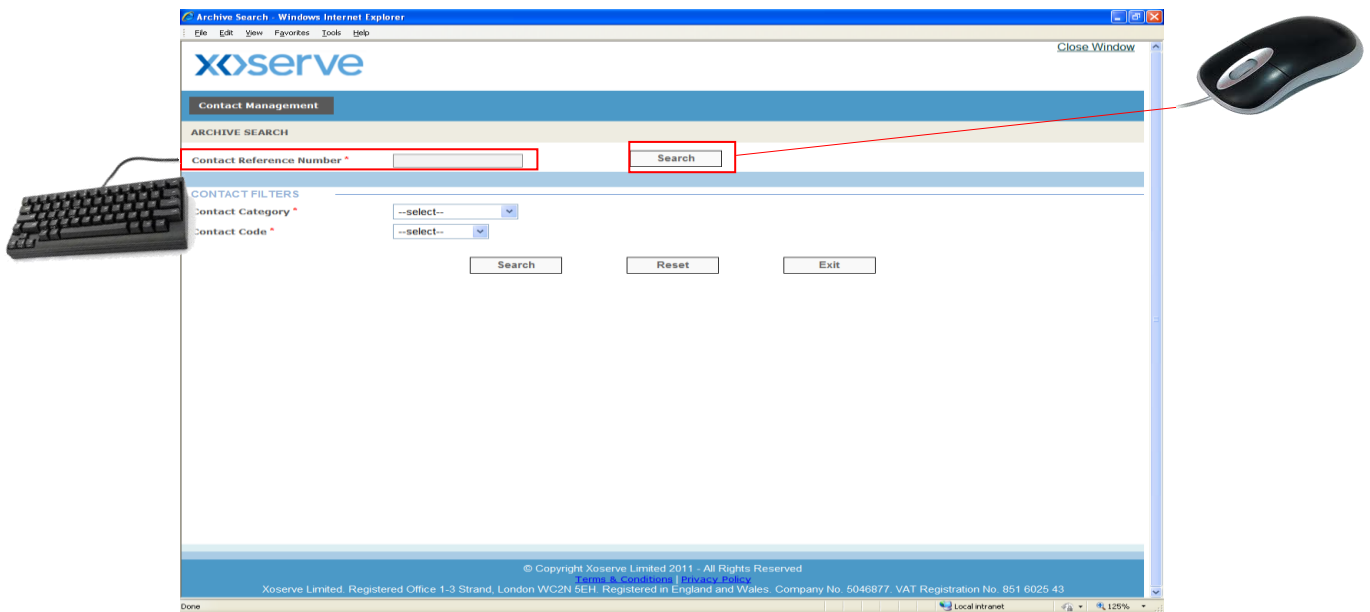
The following filters will appear to complete the search....



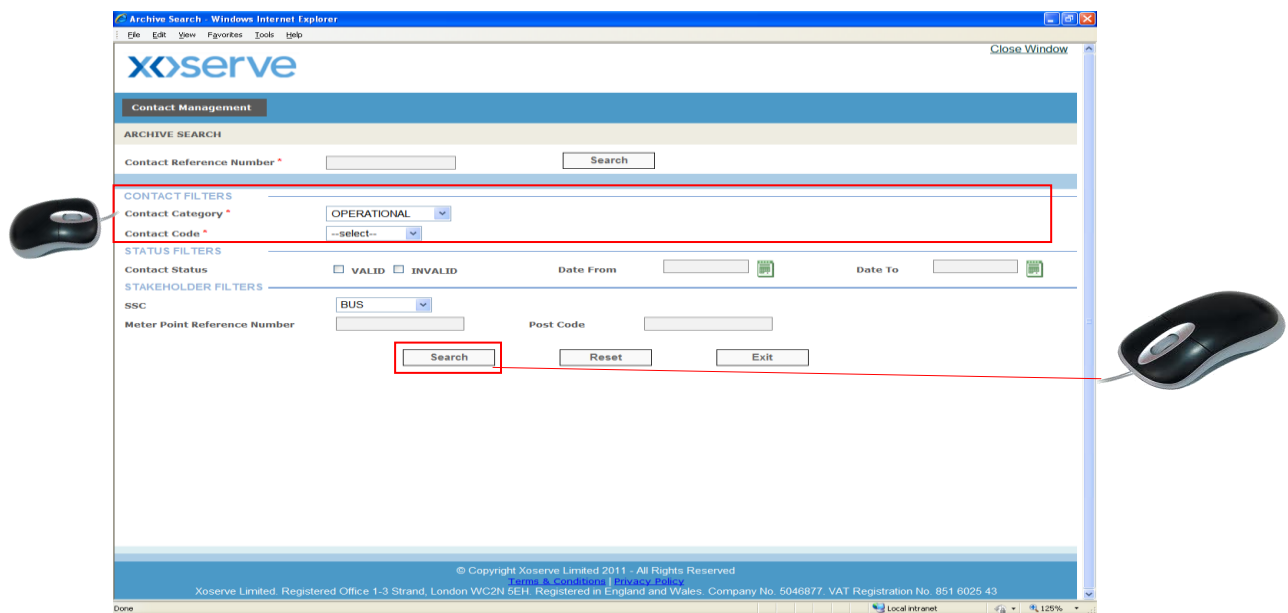
A search can be completed on a CRN or Contacts Filters. CRN search will bring back the specific Contact. Contact Filters will bring back single or multiple results.

## 7.7 Archive Search

Archive Search will allow you to locate a particular 'closed' Contact if you know the Contact Reference Number.



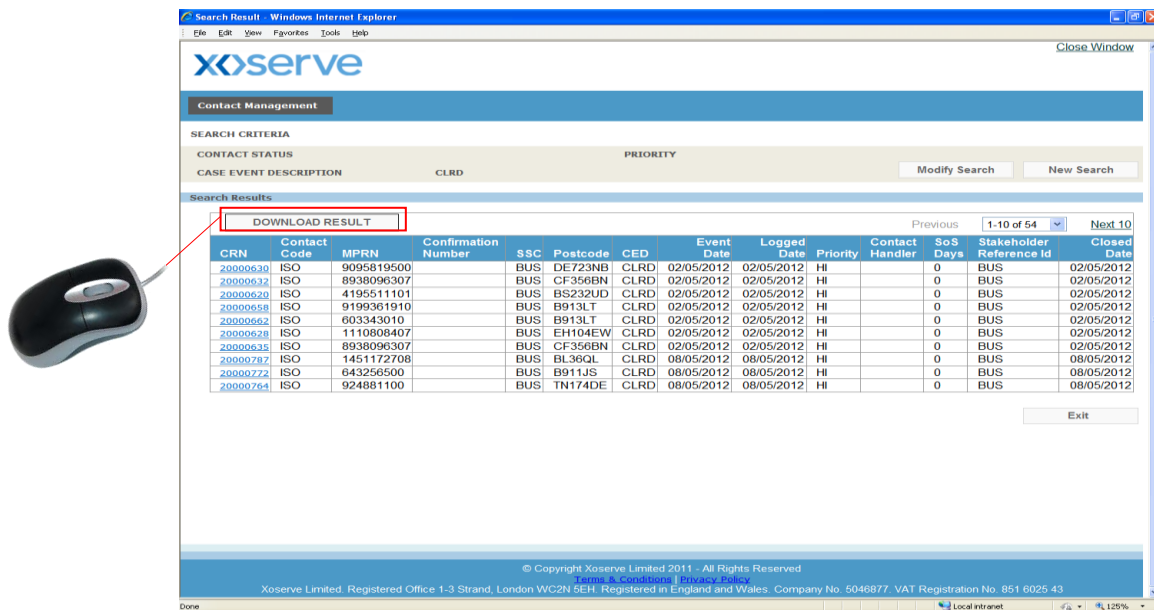
If a Contact Filter Search is chosen, enter the Contact Category and the following extra filters will appear to help refine the search.



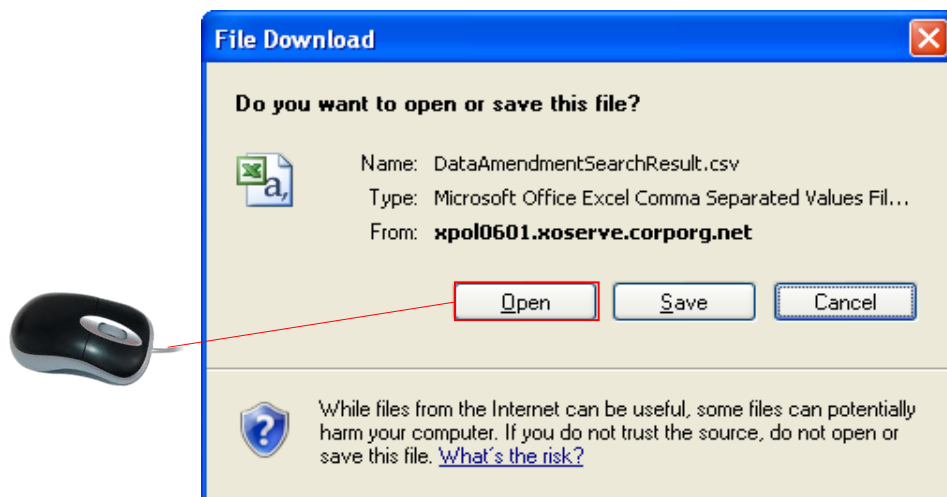
Once the data has been entered, click Search and the results of the Contact will appear.

## 7.8 Download results

The Download Results facility is available on Advanced Search, File Search, Data Clarification and Configuration Change.



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.



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

---

# **Section 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 the 'Contact Management' interface in a Windows Internet Explorer browser. The page displays contact details for ISO CRN 20000658. The contact information includes the originator (BRITISH01 GASA), meter point reference number (9199361910), and current address (1 HOMER ROAD, SOIHULL, B913LT). The status is CLRD. At the bottom of the page, a 'Challenge Resolution' button is highlighted with a red box, and a mouse cursor is pointing at it.

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

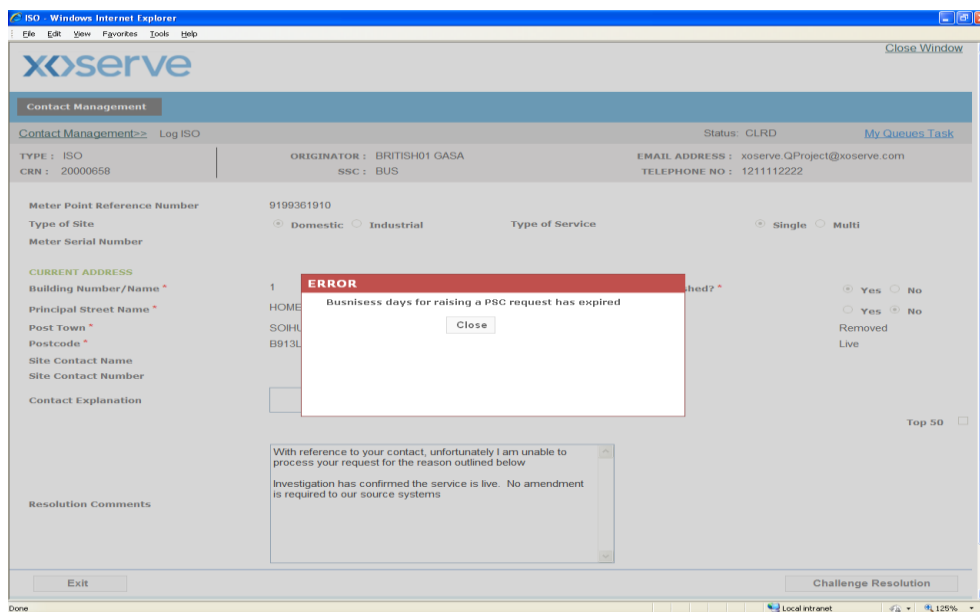
 Data Amend Service – The response can be challenged within 12 business days

 Invoicing Service – The response can be challenged within 7 business days if the Shipper has withheld.

The response can be challenged within 18 months when the Shipper has not withheld.

## 8.1 Raising a Previously Submitted Contact

If the time period has elapsed 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 correct timescales when clicking Challenge Resolution the following screen will


appear....

Step 1 – Enter your comments

Step 2 – Click Challenge.

The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser. The page title is 'PSC - Windows Internet Explorer'. The main header is 'Xoserve'. Below the header, there's a 'Contact Management' section with a 'RAISE PSC' button. The contact details are: TYPE: ISO, CRN: 20003792, ORIGINATOR: BRITISH02 GA, SSC: BUS, EMAIL ADDRESS: BGas02@xoserve.com, and TELEPHONE NO: . There's a 'View Contact Details >' link. The 'REQUEST' section has a 'Comments' field with the text 'The service has been removed, please investigate'. Below the comments, it says 'Request by: BRITISH02'. At the bottom, there are 'Challenge' and 'Cancel' buttons. A mouse cursor is pointing at the 'Challenge' button. A keyboard is visible on the right side of the screen.

 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....

The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser. The page title is 'Xoserve'. Below the header, there's a 'Contact Management' section with a 'RAISE PSC' button. The contact details are: TYPE: ISO, CRN: 20003792, ORIGINATOR: BRITISH02 GA, SSC: BUS, EMAIL ADDRESS: BGas02@xoserve.com, and TELEPHONE NO: . There's a 'View Contact Details >' link. The 'REQUEST' section has a 'Comments' field with the text 'The service has been removed, please investigate'. Below the comments, it says 'Request by: BRITISH02'. At the bottom, there are 'Challenge' and 'Cancel' buttons. A mouse cursor is pointing at the 'Challenge' button. A keyboard is visible on the right side of the screen.

## 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 displays the Xoserve Contact Management web interface in a Windows Internet Explorer browser window. The URL bar shows the address: [http://xpol0601.xoserve.corp.org.net:7877/QSystem/faces/contactManagement.jspx?\\_af6QyH4Qp8QVwL.Yzpvj2ck2w127KrcTt9w15RNz0xf8Dpv2lv3D1-15](http://xpol0601.xoserve.corp.org.net:7877/QSystem/faces/contactManagement.jspx?_af6QyH4Qp8QVwL.Yzpvj2ck2w127KrcTt9w15RNz0xf8Dpv2lv3D1-15). The page title is "Contact Management".

The interface shows the following details for a contact:

- Contact Management >>** ISO CRN 20004129
- Status:** CLRD
- My Queue Task**
- TYPE:** ISO
- ORIGINATOR:** BRITISH02 GA
- EMAIL ADDRESS:** BGas02@xoserve.com
- CRN:** 20004129
- SSC:** BUS
- TELEPHONE NO:**

The form includes several sections for input and status:

- Meter Point Reference Number:** 612676005
- Type of Site:** ☒ Domestic ☐ Industrial
- Type of Service:** ☐ Single ☐ Multi
- Meter Serial Number:**
- CURRENT ADDRESS:**
  - Building Number/Name:** REGENCY LODGE
  - Principal Street Name:** LINDEN GROVE
  - Post Town:** WALTON ON THAMES
  - Postcode:** KT121EY
- Is the site Demolished/Refurbished?:** ☒ Yes ☐ No
- Is New Supply Installed?:** ☒ Yes ☐ No
- Meter Point Status From:** Live
- Meter Point Status To:** Dead
- Site Contact Name:**
- Site Contact Number:**
- Contact Explanation:** The service has been removed, please investigate.
- Resolution Comments:** With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. The service is showing as live.

At the bottom of the form, there is an "Exit" button and a "Top 50" link.

The footer of the page contains the following text: "© 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".



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