



# **Contact Management**

## **User Guide UIP 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



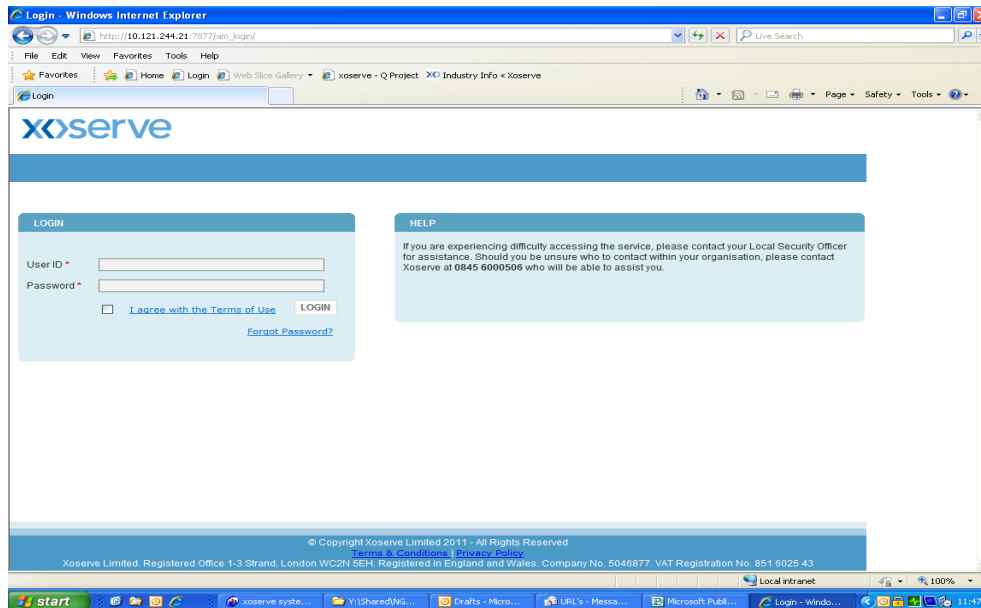
Keyboard entry required

# **Section 2**

## **Log onto Contact Management**

## 2.1 Log onto the Contact Management system

The portal Login Page looks as follows....

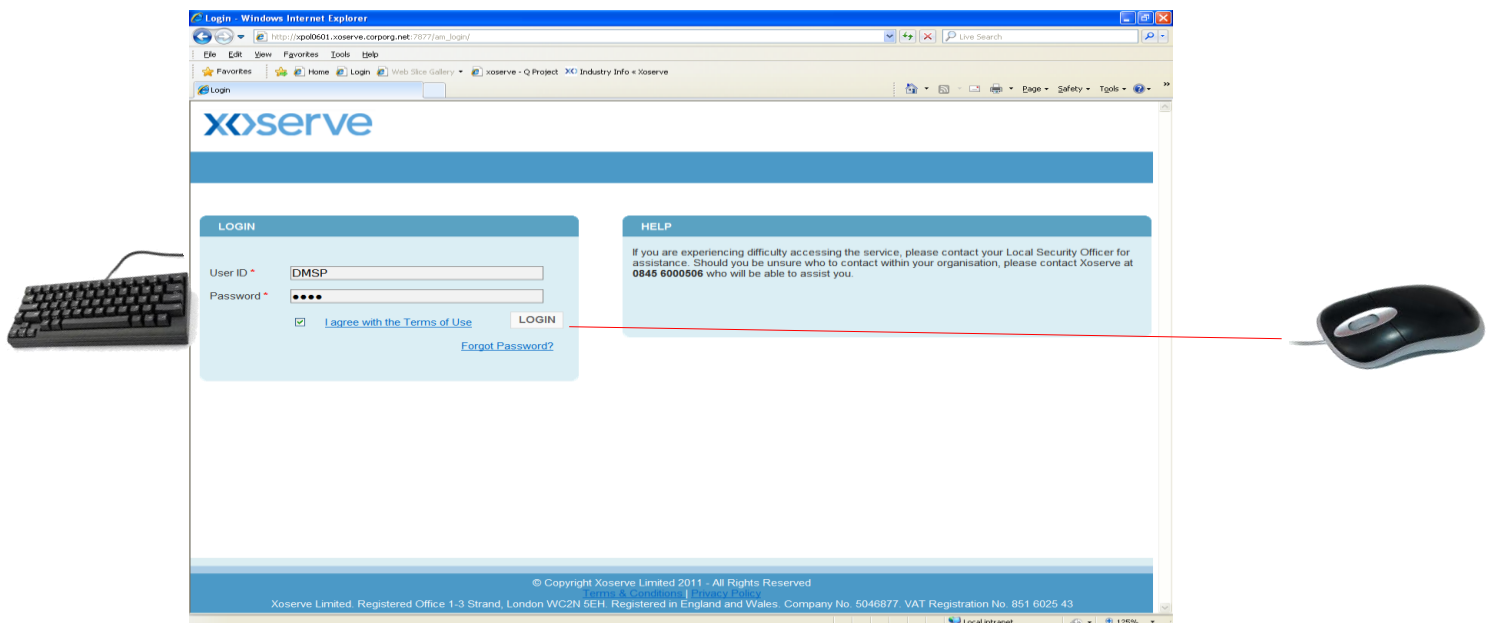


Step 1 – Enter your User ID

Step 2 – Enter your Password

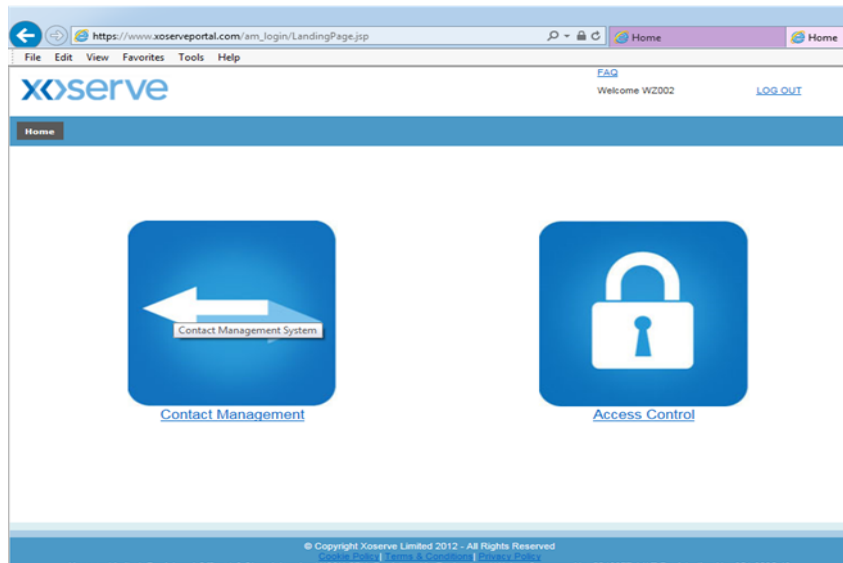
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



## 2.2 Contact Management Service Page

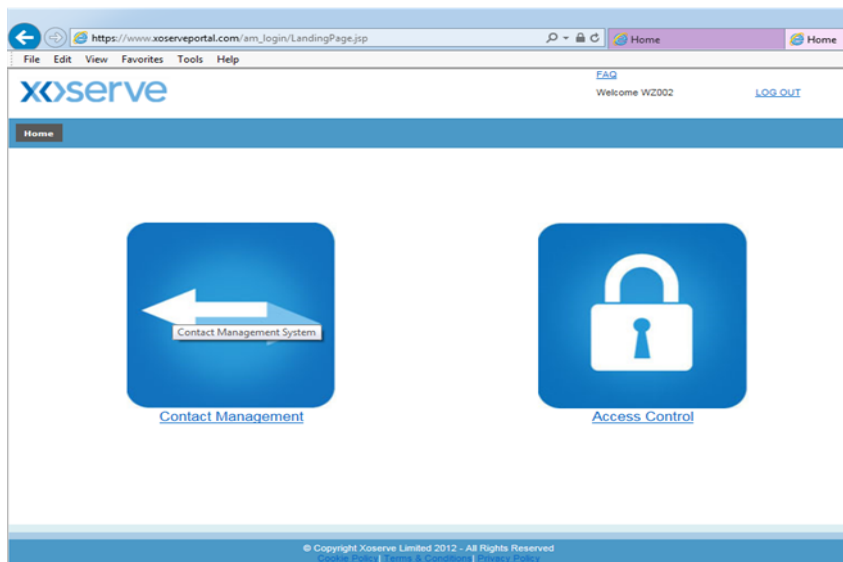
The following Service Page will appear....



There are two services on this page:-

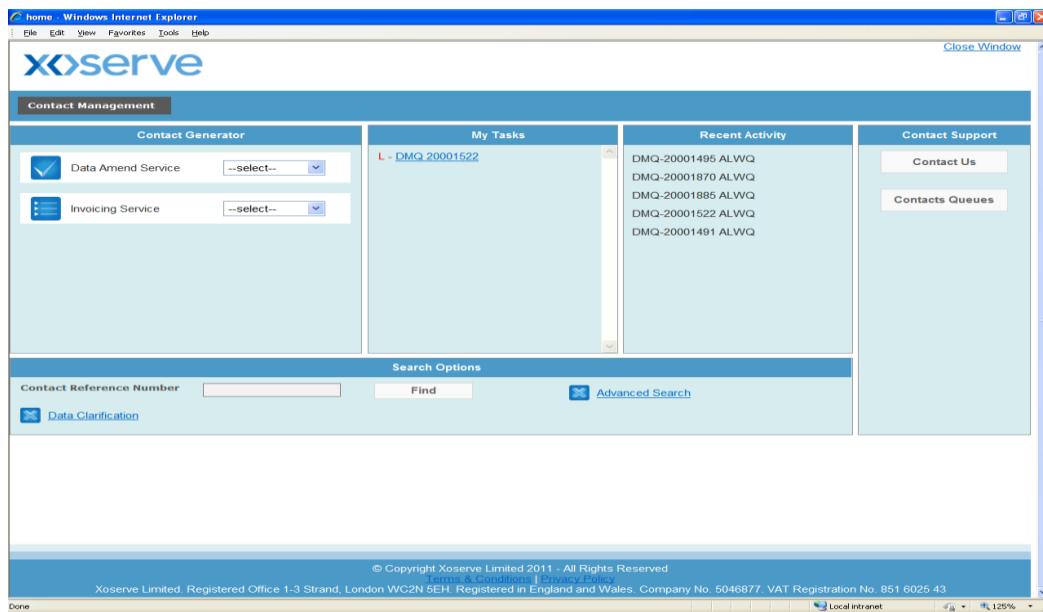
- ⇒ Contact Management
- ⇒ Access Controls

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.

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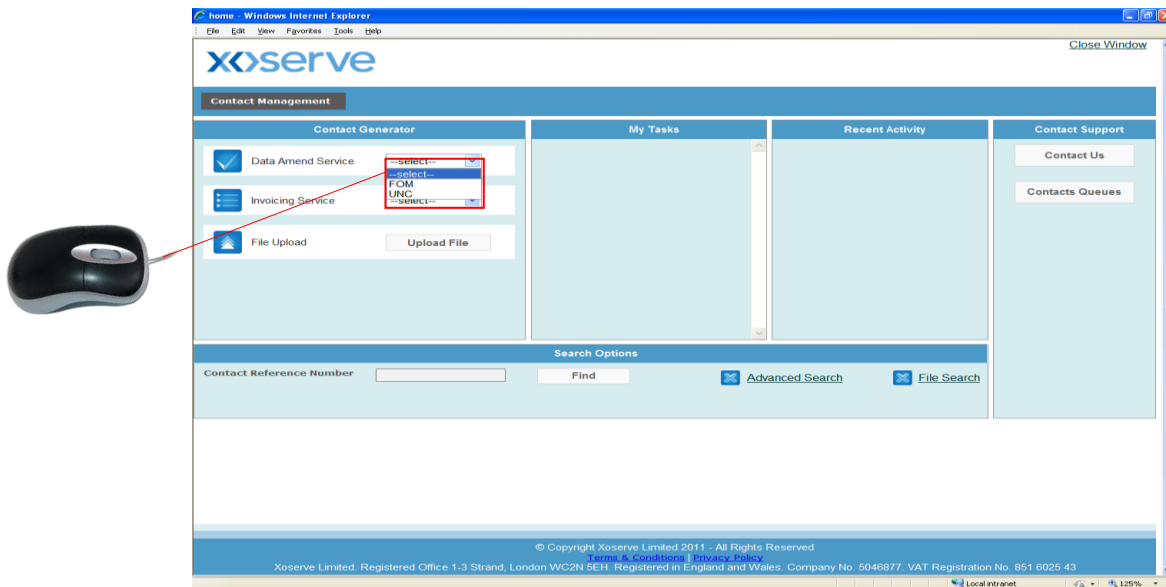
# **Section 3**

## **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.

A screenshot of the Xoserve Contact Management form for 'Log UNC'. The form is titled 'Contact Management' and includes a 'Log UNC' link. It shows the 'TYPE: UNC' and 'Status: New'. The form contains several mandatory fields marked with an asterisk (\*): 'Meter Point Reference Number' (9310251003), 'Type of Site' (Domestic selected), 'Type of Service' (Single selected), 'Building Number/Name' (10), 'Delivery Point Alias', 'Sub Building Name', 'Principal Street Name' (Homer Road), 'Dependent Street', 'Dependent Locality', 'Post Town' (Solihull), and 'Postcode' (B91 3LT). There are also fields for 'PROPOSED ADDRESS' with similar labels. A 'Swapped Address' checkbox is present. At the bottom, there are 'Submit' and 'Cancel' buttons. A mouse cursor is pointing at the 'Submit' button. 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 titled 'UNC - Windows Internet Explorer' displaying the 'Xoserve' Contact Management interface. The interface includes a header with the 'Xoserve' logo and a 'Close Window' button. Below the header, there's a 'Contact Management' section with links for 'Contact Management>>' and 'Log UNC'. The status is 'New', and there's a 'Queues' link. The form fields include 'TYPE : UNC', 'ORIGINATOR : WNW02 WNVB', 'SSC \* : WNW', 'EMAIL ADDRESS : WNW02@xoserve.com', and 'TELEPHONE NO :'. The 'Meter Point Reference Number' is '9310251003'. The 'Type of Site' is 'Domestic' (selected) and 'Industrial'. The 'Type of Service' is 'Single' (selected) and 'Multi'. The 'CURRENT ADDRESS' section includes fields for 'Building Number/Name \*' (10), 'Delivery Point Alias', 'Sub Building Name', 'Principal Street Name \*' (Homer Road), 'Dependent Street', 'Dependent Locality', 'Post Town \*' (Solihull), and 'Postcode \*' (B91 3LT). There's a 'Swapped Address -' checkbox. The 'Submit' and 'Cancel' buttons are at the bottom. A 'Top 50' link is also present. A copyright notice at the bottom reads: '© 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'. A confirmation dialog box titled 'Contact Logged Successfully' is overlaid on the form, displaying 'Contact Reference Number: 20004259' and 'Logging Time: Tue Aug 21 2012 14:02'. The dialog has a 'Close' button.



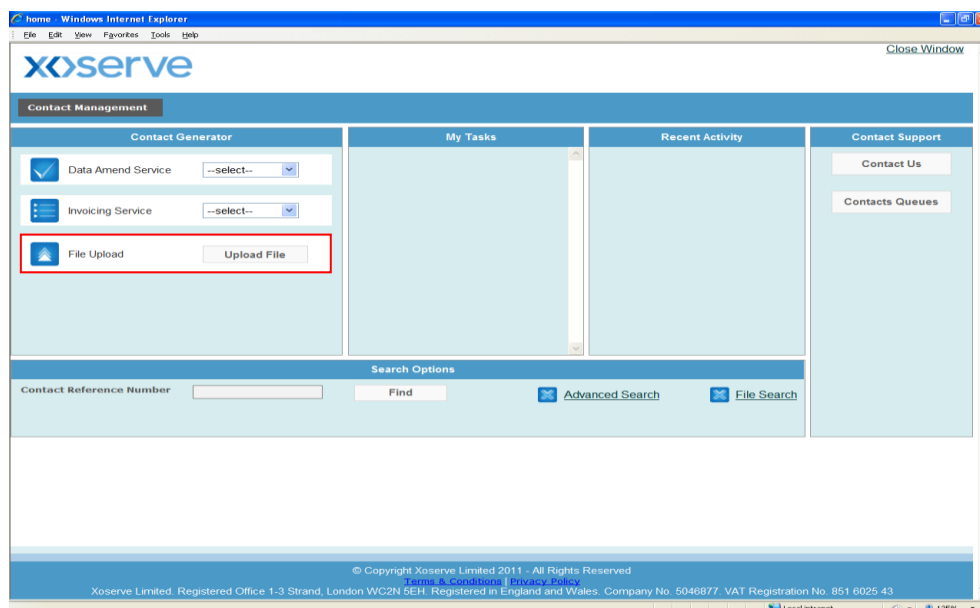
You may want to make a note of the Contact Reference Number, however you will see it appear in 'Recent Activity' on the Contact Management home page.

### 3.2 File Upload

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


|    | A            | B            | C                        | D                        | E                                       | F  | G                 | H                     | I                    | J  | K                                | L                             | M                                       | N                         |
|----|--------------|--------------|--------------------------|--------------------------|---|--|-------------------|-----------------------|----------------------|--|----------------------------------|-------------------------------|---|---------------------------|
| 2  | V1.0 Xoserve | OMP [M] [T3] | Stakeholder ID [M] [N10] | Originator Code [M] [T3] | Stakeholder Personnell'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 AG [CM] [N12] |
| 3  | Check        | OMP          | 434                      | BUS                      | Mr Smith                                |  | JS125             | ADD                   |                      |  |                                  |                               |   |                           |
| 4  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 5  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 6  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 7  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 8  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 9  |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 10 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 11 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 12 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 13 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 14 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 15 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 16 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 17 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 18 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 19 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |
| 20 |              |              |                          |                          |   |  |                   |                       |                      |  |                                  |                               |   |                           |

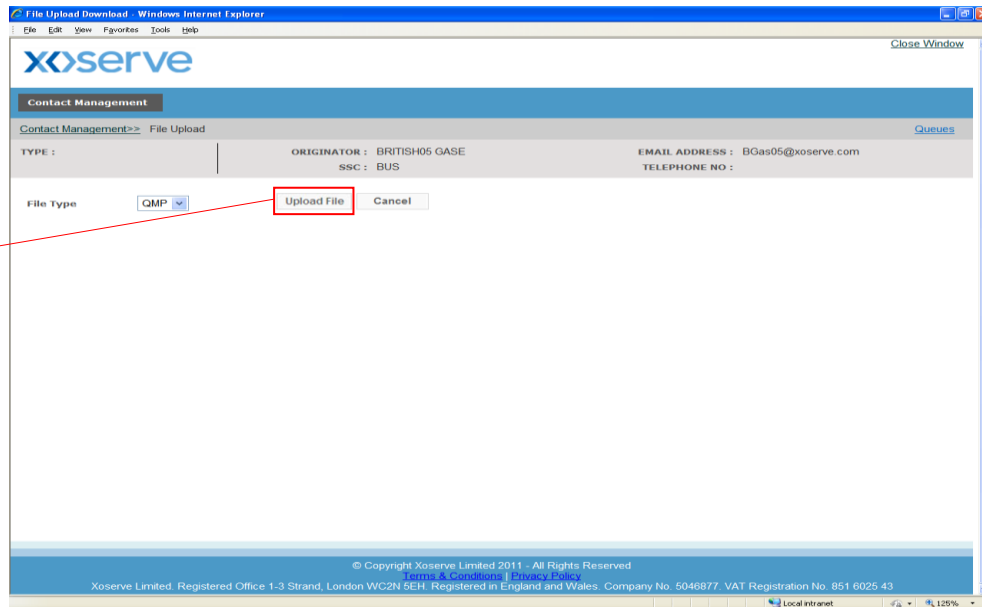
Once the EFT template has been completed successfully and all mandatory information has been entered Column A will change from red to green. You can then upload your template to the system using the file upload shown on the Contact Management home page.



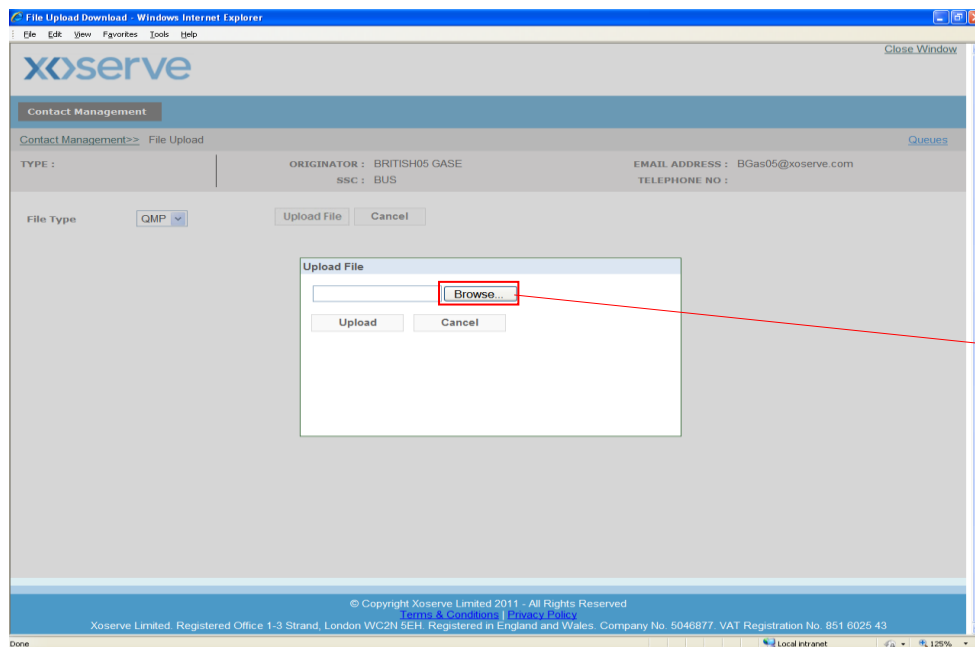
## 3.2 File Upload

The following screen will appear....

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

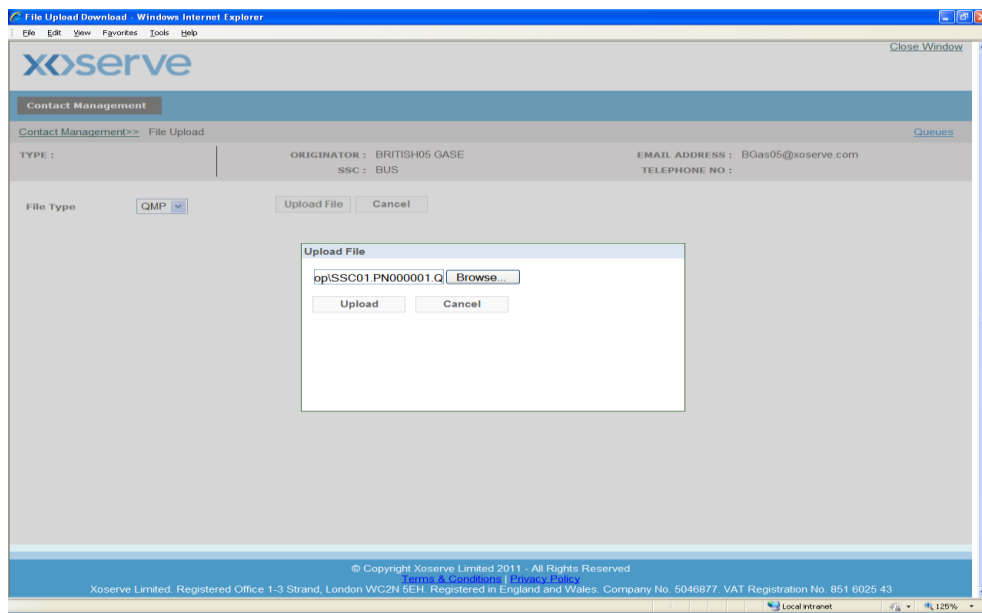


Select file upload and the File Upload screen will appear.



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.

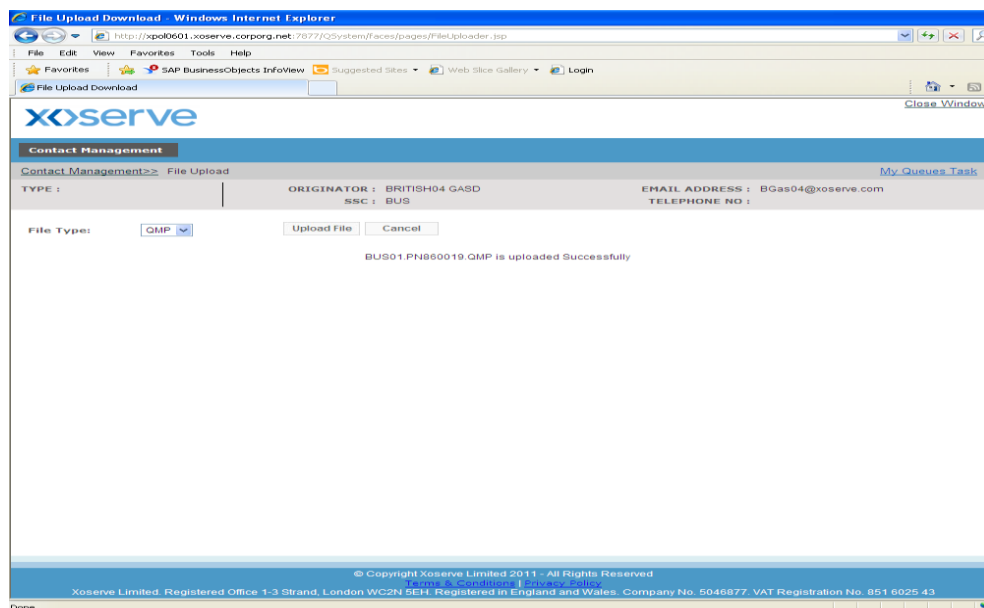
## 3.2 File Upload



Select Upload, and the file is submitted.

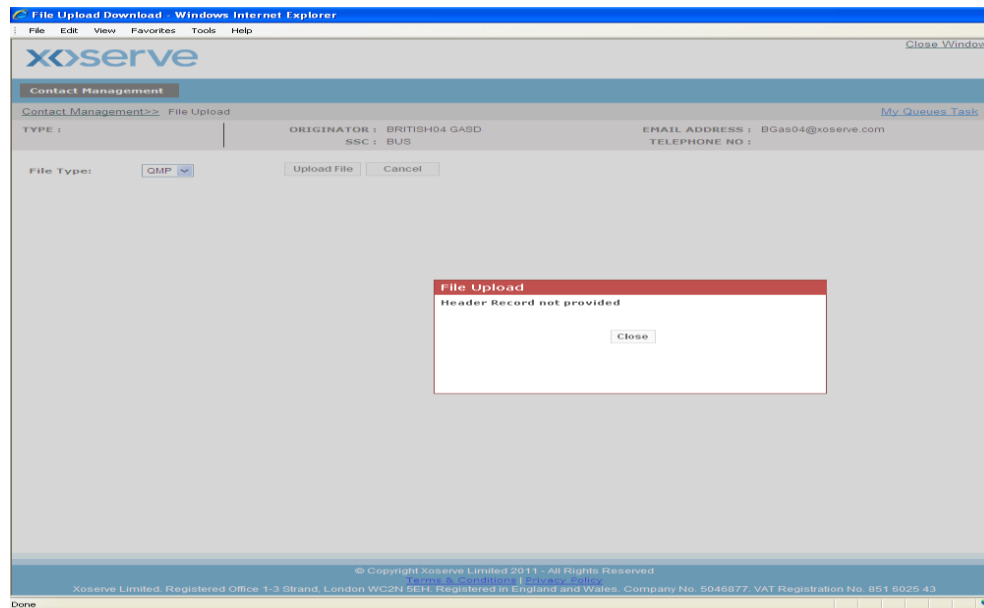
You will receive a message at this point stating whether the submission has successfully loaded or rejected.

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.

UNC - Windows Internet Explorer

**xoserve**

Contact Management

Contact Management>> Log UNC Status: New Queues

TYPE : UNC ORIGINATOR : WNW02 WNVB EMAIL ADDRESS : WNW02@xoserve.com  
SSC : WNW TELEPHONE NO :

Meter Point Reference Number \* 9310251003

Type of Site \* ☒ Domestic ☐ Industrial Type of Service \* ☒ Single ☐ Multi

**CURRENT ADDRESS**

Building Number/Name \* 10  
Delivery Point Alias  
Sub Building Name  
Principal Street Name \* Homer Road  
Dependent Street  
Dependent Locality  
Post Town \* Solihull  
Postcode \* B91 3LT

**PROPOSED ADDRESS**

Building Number/Name \* 11  
Delivery Point Alias  
Sub Building Name  
Principal Street Name \* Homer Road  
Dependent Street  
Dependent Locality  
Post Town \* Solihull  
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.

UNC - Windows Internet Explorer

**xoserve**

Contact Management

Contact Management>> Log UNC Status: New Queues

TYPE : UNC ORIGINATOR : WNW02 WNVB EMAIL ADDRESS : WNW02@xoserve.com  
SSC : WNW TELEPHONE NO :

Meter Point Reference Number \* 9310250910

Type of Site \* ☒ Domestic ☐ Industrial Type of Service \* ☒ Single ☐ Multi

**CURRENT ADDRESS**

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

**PROPOSED ADDRESS**

Building Number/Name \* Plot 101  
Delivery Point Alias  
Sub Building Name  
Principal Street Name \* Homer Road  
Dependent Street  
Dependent Locality  
Post Town \* Solihull  
Postcode \* B91 3LT

☐ Swapped Address -

Submit Cancel

Top 50 ☒

**Contact Logged Successfully**

Contact Reference Number: 20004260  
Logging Time: Tue Aug 21 2012 14:03  
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

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

| CONTACT | CRN-ID   | PRIORITY | TOP 50 | SSC | CONTACT LOGGED DATE |
|---------|----------|----------|--------|-----|---------------------|
| UNC     | 20000191 | Low      | No     | FC7 | 19/04/2012 14:58:03 |
| UNC     | 20000225 | Low      | No     | FC7 | 20/04/2012 14:24:32 |
| UNC     | 20001414 | Low      | No     | FC7 | 21/05/2012 11:51:13 |
| UNC     | 20001417 | Low      | No     | FC7 | 21/05/2012 11:51:47 |
| UNC     | 20001419 | Low      | No     | FC7 | 21/05/2012 11:52:03 |
| UNC     | 20001420 | Low      | No     | FC7 | 21/05/2012 11:52:21 |
| UNC     | 20001422 | Low      | No     | FC7 | 21/05/2012 11:52:41 |
| UNC     | 20001423 | Low      | No     | FC7 | 21/05/2012 11:52:53 |
| UNC     | 20001424 | Low      | No     | FC7 | 21/05/2012 11:53:16 |
| UNC     | 20001425 | Low      | No     | FC7 | 21/05/2012 11:53:32 |

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

### My Tasks

This table is linked to the My Tasks zone on the Contact Management home page. This queue is not applicable to you.

### Contacts Queue

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

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# **Section 5**

## **Resolution of a Contact**

## 5.1 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 CRN 20000221 are displayed, including the originator (EAMONN DARCY), email address (Eamonn.Darcy@corporg.net), and telephone number. The contact is currently in a 'CLR'D' status. The 'CURRENT ADDRESS' section shows the building number/name as 31, delivery point alias as HOMER ROAD, and the post town as SOLIHULL. The 'PROPOSED ADDRESS' section shows the building number/name as 95, delivery point alias as HOMER ROAD, and the post town as SOLIHULL. A resolution message is displayed in a text box, stating: 'With reference to your contact, I am pleased to inform you that your request has been actioned. Address creation batch job closed the contact. Thank you for raising this contact and I hope it is resolved to your satisfaction.' A red box highlights the message, and a red line points to a callout 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 CRN 20000130 are displayed, including the originator (FC702 FC7B), email address (FC702@xoserve.com), and telephone number. The contact is currently in a 'CLR'D' status. The 'ADDRESS' section shows the building number/name as 80, delivery point alias as HOPE STREET, and the post town as SOLIHULL. The 'ADDITIONAL INFORMATION (FOR UIP ONLY)' section shows the stakeholder reference number as Test2. A resolution message is displayed in a text box, stating: 'With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. Meter Point already exists.' A red box highlights the message, and a red line points to a callout box on the right that says: 'This part tells you why your Contact was not upheld.'

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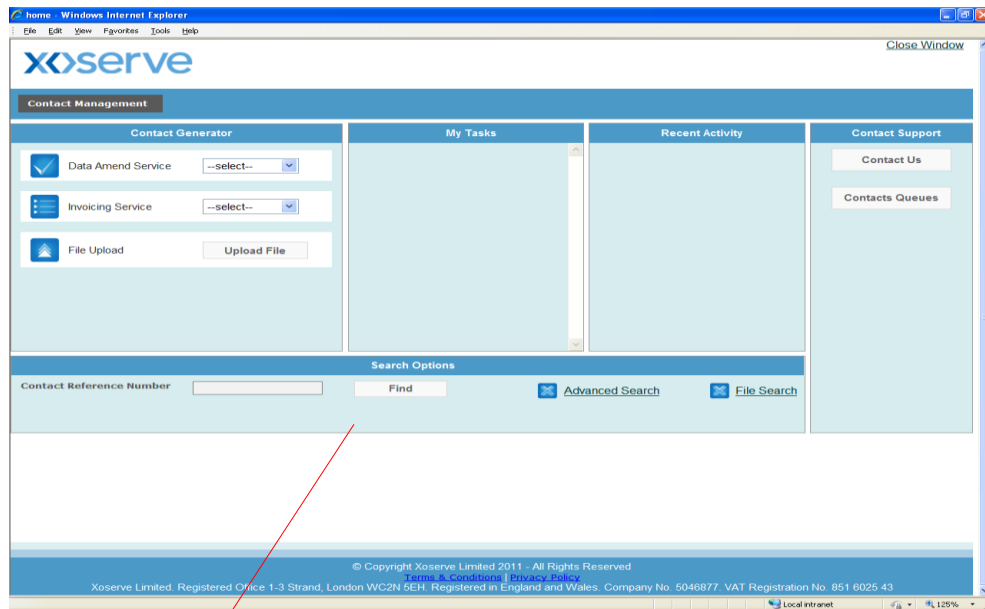
# **Section 6**

# **Search Facilities**

## 6.1 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 three search facilities on the Contact Management Home Page, these are:

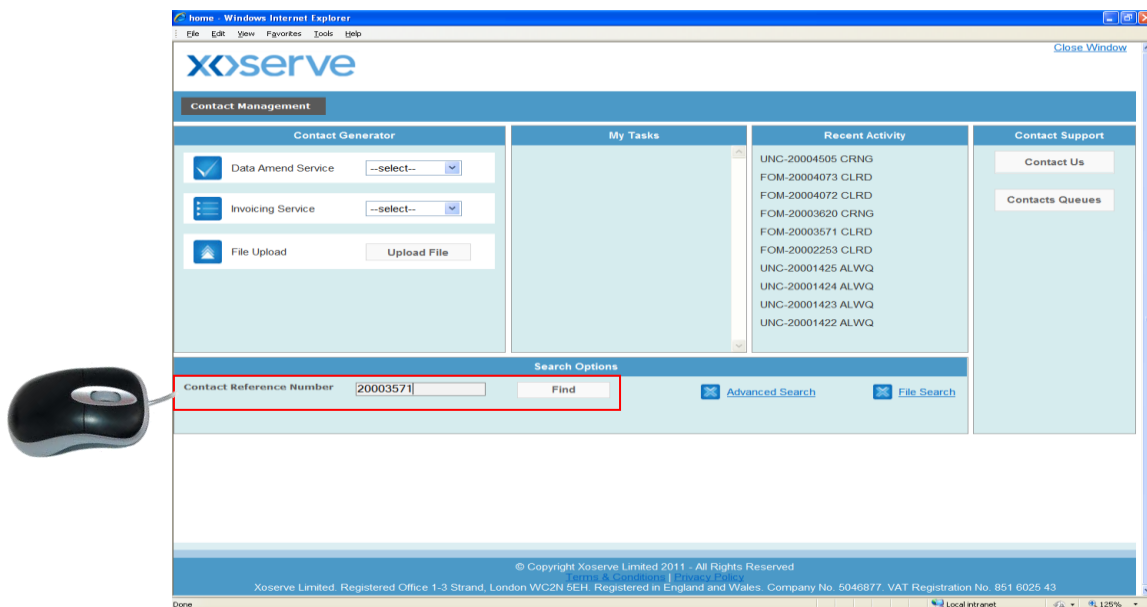
Basic Search – Searching for a Contact Reference Number

Advanced Search – Searching for a Contact using specific criteria

File Search – Searching for a file submitted to Xoserve

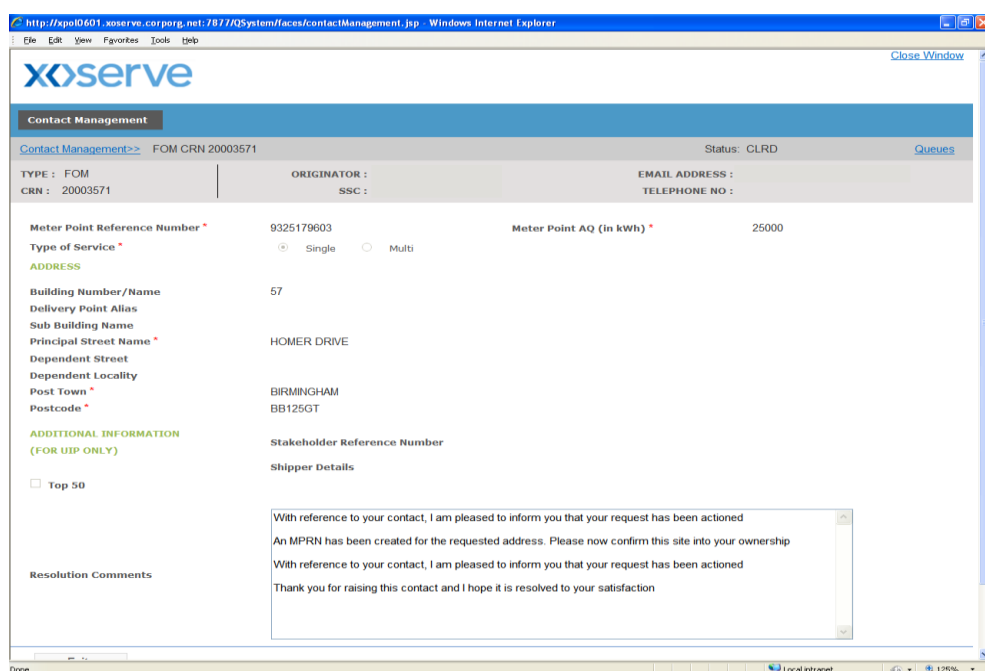
## 6.2 Basic Search

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



The screenshot shows the Xoserve Contact Management interface. The 'Search Options' section at the bottom contains a 'Contact Reference Number' field with the value '20003571' and a 'Find' button. A red box highlights these elements. A mouse cursor is pointing at the 'Find' button. The interface also includes 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 Xoserve Contact Management interface displaying the details of a contact. The contact details are displayed in a table format.

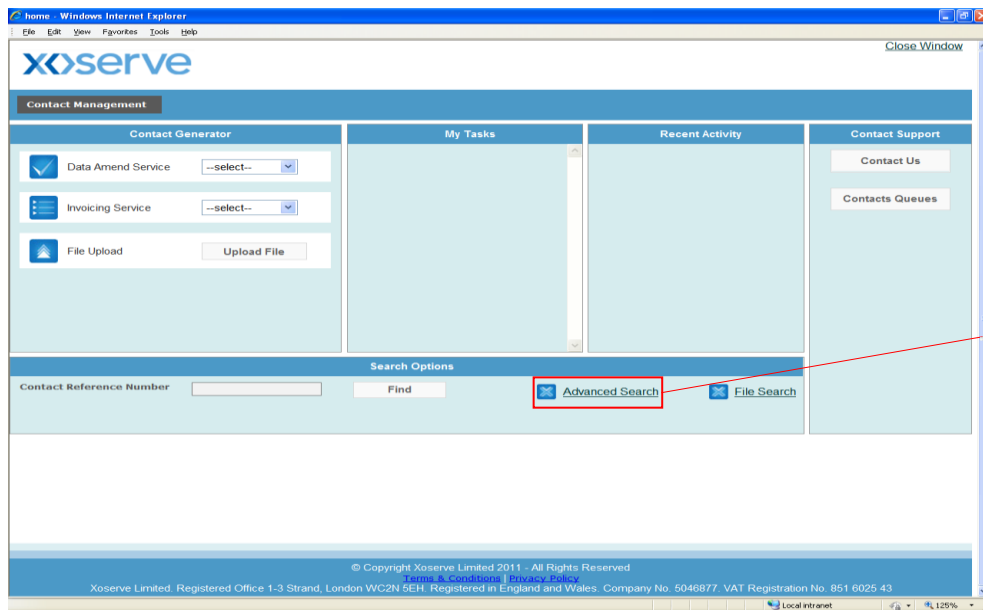
| Contact Management >> FOM CRN 20003571 |   | Status: CLRD              | <a href="#">Queues</a> |
|--|---|---------------------------|------------------------|
| TYPE : FOM                             | ORIGINATOR :  | EMAIL ADDRESS :           |                        |
| CRN : 20003571                         | SSC :   | TELEPHONE NO :            |                        |
| Meter Point Reference Number *         | 9325179603  | Meter Point AQ (in kWh) * | 25000                  |
| Type of Service *                      | <input type="radio"/> Single <input type="radio"/> Multi  |                           |                        |
| ADDRESS                                |   |                           |                        |
| Building Number/Name                   | 57  |                           |                        |
| Delivery Point Alias                   |   |                           |                        |
| Sub Building Name                      |   |                           |                        |
| Principal Street Name *                | HOMER DRIVE   |                           |                        |
| Dependent Street                       |   |                           |                        |
| Dependent Locality                     |   |                           |                        |
| Post Town *                            | BIRMINGHAM  |                           |                        |
| Postcode *                             | BB125GT   |                           |                        |
| ADDITIONAL INFORMATION (FOR UIP ONLY)  |   |                           |                        |
| <input type="checkbox"/> Top 50        | Stakeholder Reference Number  |                           |                        |
|  | Shipper Details   |                           |                        |
| Resolution Comments                    | <div>With reference to your contact, I am pleased to inform you that your request has been actioned<br/>An MPRN has been created for the requested address. Please now confirm this site into your ownership<br/>With reference to your contact, I am pleased to inform you that your request has been actioned<br/>Thank you for raising this contact and I hope it is resolved to your satisfaction</div> |                           |                        |



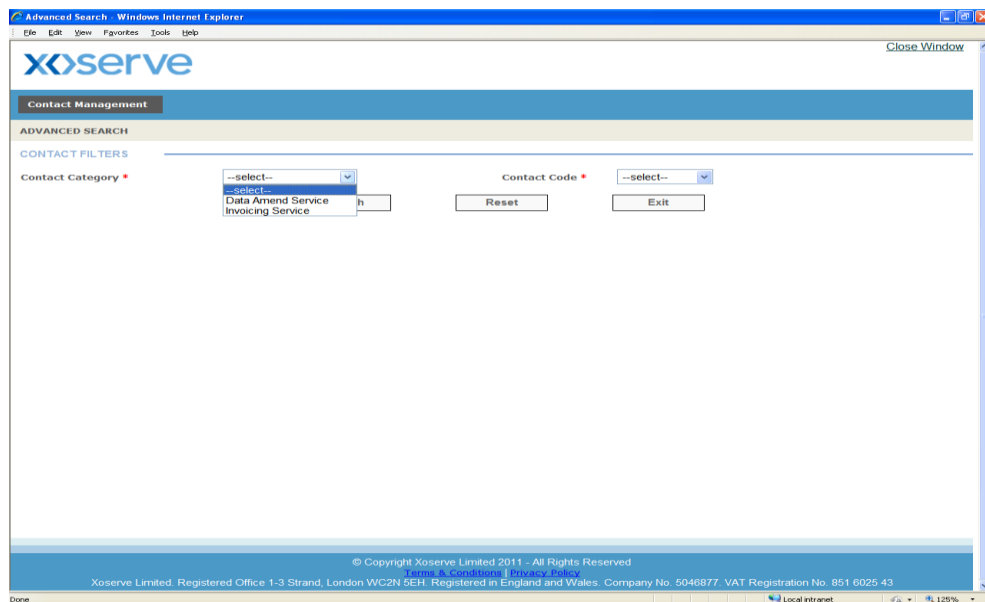
You can not edit this Contact: it is read only.

## 6.3 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.



## 6.3 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 \* FOM

Priority ☐ Top 50 ☐ PSC ☐ All

**STATUS FILTERS**

☒ Case Event Description ☐ Contact Status ☐ All

CLRD

ALL

Date From Date To

**STAKEHOLDER FILTERS**

SSC --select-- Logged By

Meter Point Reference Number Postcode 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 CASE EVENT DESCRIPTION CLRD PRIORITY

Modify Search New Search

**Search Results**

DOWNLOAD RESULT

Previous 1-10 of 20 Next 10

| CRN      | Contact Code | MPRN       | Confirmation Number | SSC | Postcode | CED  | Event Date | Logged Date | Priority | Contact Handler | SoS Days | Stakeholder Reference | Closed Date |
|----------|--------------|------------|---------------------|-----|----------|------|------------|-------------|----------|-----------------|----------|-----------------------|-------------|
| 20000130 | FOM          | 12294610   |                     | FC7 | B913LT   | CLRD | 17/04/2012 | 17/04/2012  | LO       |                 | 0        |                       | 17/04/2012  |
| 20000129 | FOM          | 4174261401 |                     | FC7 | B913LT   | CLRD | 17/04/2012 | 17/04/2012  | LO       |                 | 0        |                       | 17/04/2012  |
| 20000781 | FOM          | 9191214508 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000779 | FOM          | 9203977108 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000780 | FOM          | 2717208200 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000782 | FOM          | 50155206   |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20001520 | FOM          | 9322015310 |                     | FC7 | WS114QB  | CLRD | 24/05/2012 | 22/05/2012  | LO       |                 | 2        |                       | 24/05/2012  |
| 20002253 | FOM          | 47         |                     | FC7 | B903LT   | CLRD | 30/05/2012 | 30/05/2012  | LO       |                 | 0        |                       | 30/05/2012  |
| 20002290 | FOM          | 9220090105 |                     | FC7 | B933LT   | CLRD | 31/05/2012 | 31/05/2012  | LO       |                 | 0        |                       | 31/05/2012  |
| 20003467 | FOM          | 7448108710 |                     | FC7 | PO108EA  | CLRD | 12/06/2012 | 12/06/2012  | LO       |                 | 0        |                       | 12/06/2012  |

**Exit**

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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.



## 6.3 Advanced Search

### Modify Search

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

| CRN      | Contact Code | MPRN       | Confirmation Number | SSC | Postcode | CED  | Event Date | Logged Date | Priority | Contact Handler | SoS Days | Stakeholder Reference | Closed Date |
|----------|--------------|------------|---------------------|-----|----------|------|------------|-------------|----------|-----------------|----------|-----------------------|-------------|
| 20000130 | FOM          | 12294610   |                     | FC7 | B913LT   | CLRD | 17/04/2012 | 17/04/2012  | LO       |                 | 0        |                       | 17/04/2012  |
| 20000129 | FOM          | 4174261401 |                     | FC7 | B913LT   | CLRD | 17/04/2012 | 17/04/2012  | LO       |                 | 0        |                       | 17/04/2012  |
| 20000781 | FOM          | 9191214508 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000779 | FOM          | 9203977108 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000780 | FOM          | 2717208200 |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20000782 | FOM          | 50155206   |                     | FC7 | B913LT   | CLRD | 08/05/2012 | 08/05/2012  | LO       |                 | 0        |                       | 08/05/2012  |
| 20001520 | FOM          | 9322015310 |                     | FC7 | WS114QB  | CLRD | 24/05/2012 | 22/05/2012  | LO       |                 | 2        |                       | 24/05/2012  |
| 20002253 | FOM          | 47         |                     | FC7 | B903LT   | CLRD | 30/05/2012 | 30/05/2012  | LO       |                 | 0        |                       | 30/05/2012  |
| 20002290 | FOM          | 9220090105 |                     | FC7 | B933LT   | CLRD | 31/05/2012 | 31/05/2012  | LO       |                 | 0        |                       | 31/05/2012  |
| 20003467 | FOM          | 7448108710 |                     | FC7 | PO108EA  | CLRD | 12/06/2012 | 12/06/2012  | LO       |                 | 0        |                       | 12/06/2012  |

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

ADVANCED SEARCH

CONTACT FILTERS

Contact Category \* Data Amend Service Contact Code \* FOM

Priority ☐ Top 50 ☐ PSC ☐ All

STATUS FILTERS

☒ Case Event Description CLR ☐ Contact Status ALL ☐ All

STAKEHOLDER FILTERS

SSC --select-- Logged By

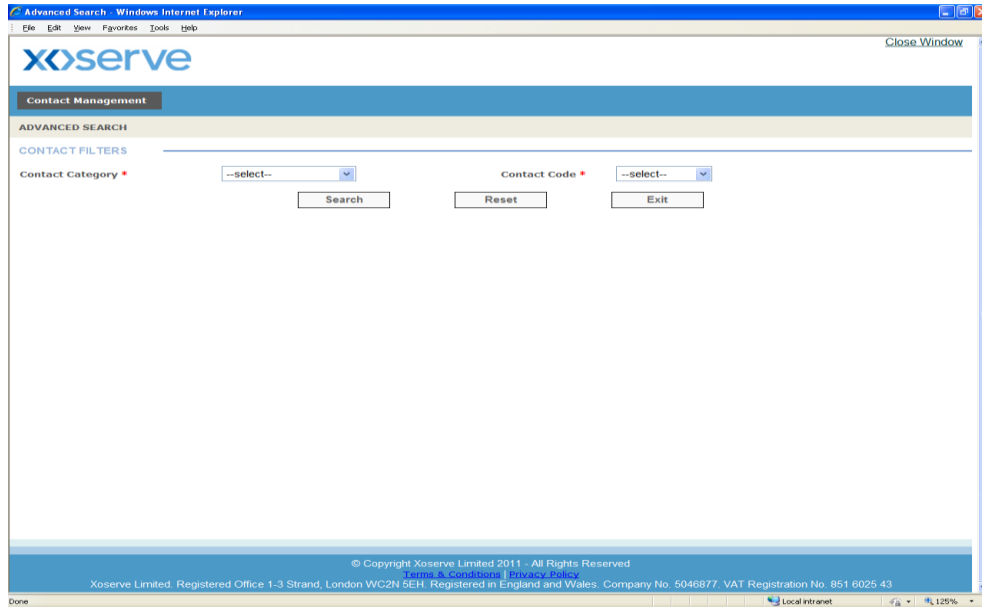
Meter Point Reference Number Postcode Confirmation Number

Search Reset Exit

## 6.3 Advanced Search

### New Search

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



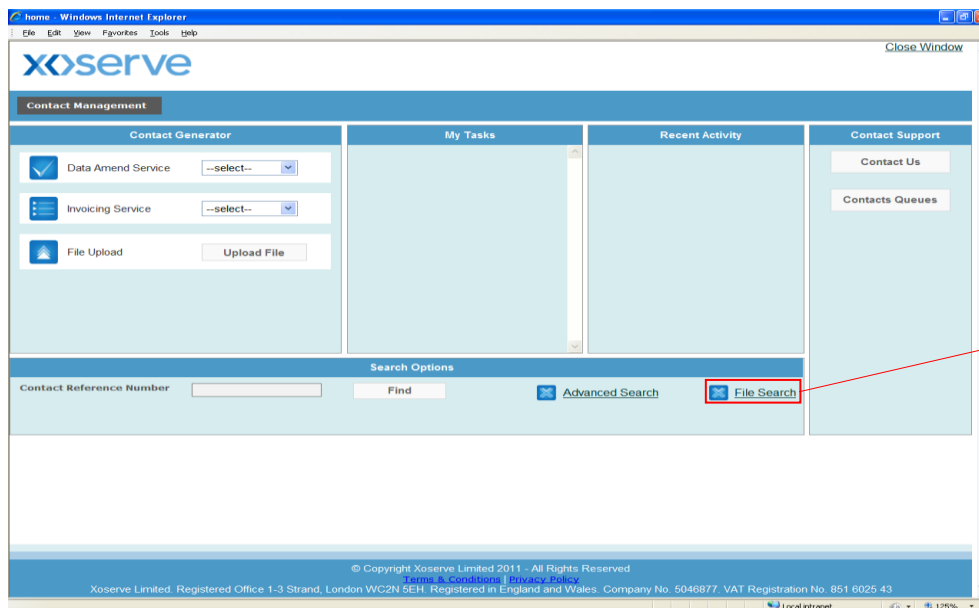
The screenshot shows a web browser window titled "Advanced Search - Windows Internet Explorer". The page features the Xserve logo at the top left. Below the logo is a navigation bar with "Contact Management" highlighted. The main content area is titled "ADVANCED SEARCH" and "CONTACT FILTERS". It contains two dropdown menus: "Contact Category" and "Contact Code", both currently set to "--select--". Below these are three buttons: "Search", "Reset", and "Exit". The footer of the page includes copyright information for Xserve Limited, registered in England and Wales, with company number 5046877 and VAT registration number 851 6025 43. The browser's status bar at the bottom shows "Local intranet" and a zoom level of 125%.



You will need to repeat the selection step demonstrated on page 23. To pick a Contact Category and the Contact Code you require.

## 6.4 File Search

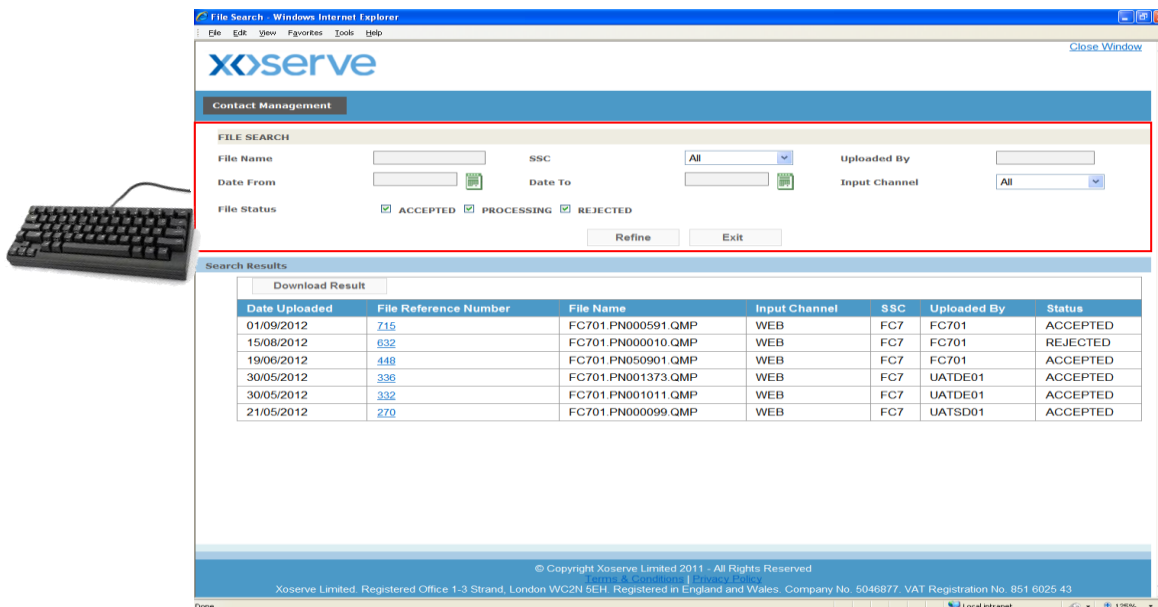
To retrieve information on files you have submitted to Xoserve, click on 'File Search'.



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.

## 6.4 File Search

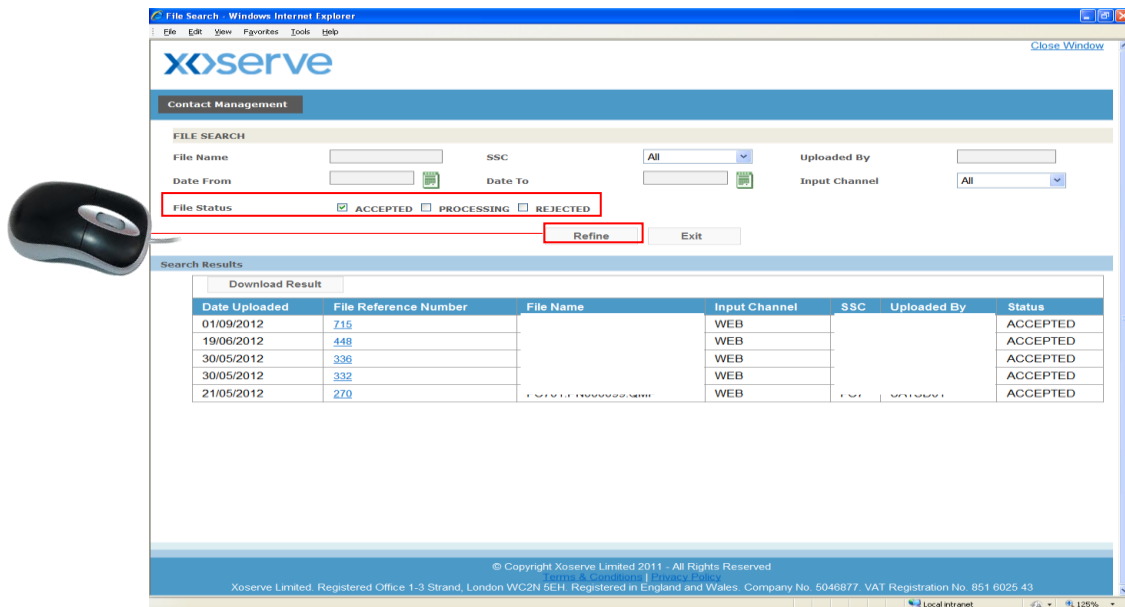
**ACCEPTED:** Means that each record has been through validation checks, however some of these records may have failed those checks. You will be able to identify these if you open up the file.

**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**

File Name:  SSC:  All  Uploaded By:   
Date From:  Date To:  Input Channel:   
File Status: ☒ ACCEPTED ☐ PROCESSING ☐ REJECTED  
**Refine** **Exit**

**Search Results**

| Date Uploaded | File Reference Number | File Name | Input Channel | SSC | Uploaded By | Status   |
|---------------|-----------------------|-----------|---------------|-----|-------------|----------|
| 01/09/2012    | 715                   |           | WEB           |     |             | ACCEPTED |
| 19/06/2012    | 448                   |           | WEB           |     |             | ACCEPTED |
| 30/05/2012    | 336                   |           | WEB           |     |             | ACCEPTED |
| 30/05/2012    | 332                   |           | WEB           |     |             | ACCEPTED |
| 21/05/2012    | 270                   |           | WEB           |     |             | ACCEPTED |

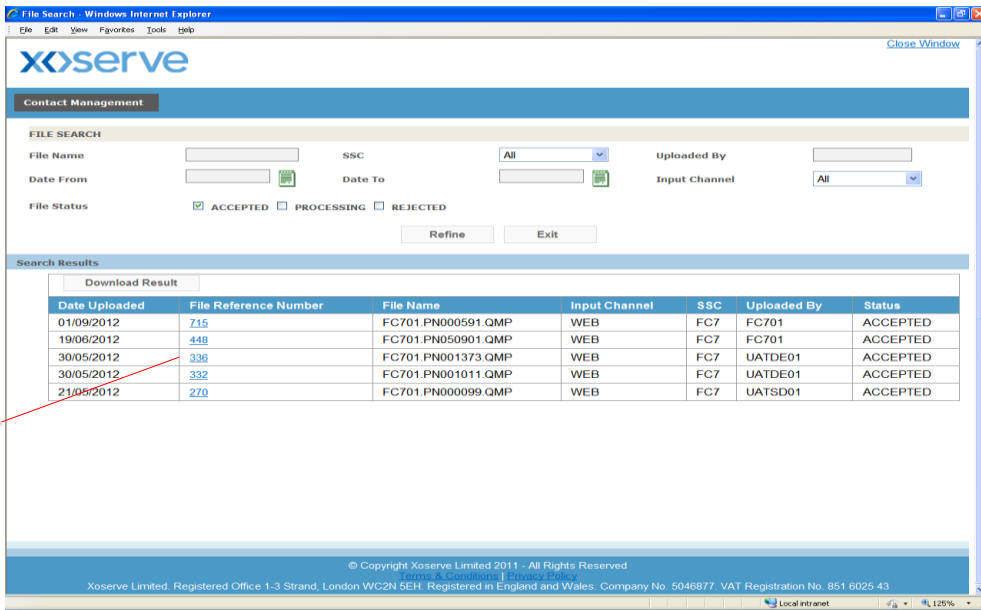
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For the criteria selected above in the above screen the results show all files at 'Accepted' status. The following will appear ....(see next page)



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.

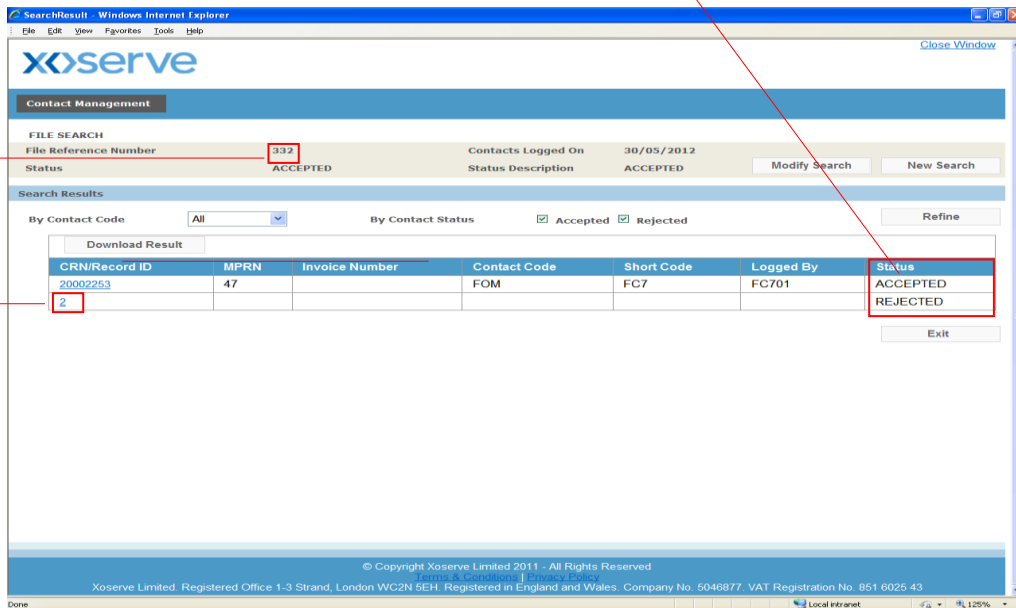
## 6.4 File Search



The screenshot shows the 'File Search' window in Internet Explorer. The 'FILE SEARCH' section includes filters for File Name, SSC (set to 'All'), Date From, Date To, File Status (with 'ACCEPTED' selected), and Input Channel (set to 'All'). Below the filters is a 'Search Results' table with columns: Date Uploaded, File Reference Number, File Name, Input Channel, SSC, Uploaded By, and Status. A mouse cursor is pointing at the 'File Reference Number' column.

| Date Uploaded | File Reference Number | File Name          | Input Channel | SSC | Uploaded By | Status   |
|---------------|-----------------------|--------------------|---------------|-----|-------------|----------|
| 01/09/2012    | <a href="#">715</a>   | FC701.PN000591.QMP | WEB           | FC7 | FC701       | ACCEPTED |
| 19/06/2012    | <a href="#">448</a>   | FC701.PN050901.QMP | WEB           | FC7 | FC701       | ACCEPTED |
| 30/05/2012    | <a href="#">336</a>   | FC701.PN001373.QMP | WEB           | FC7 | UATDE01     | ACCEPTED |
| 30/05/2012    | <a href="#">332</a>   | FC701.PN001011.QMP | WEB           | FC7 | UATDE01     | ACCEPTED |
| 21/05/2012    | <a href="#">270</a>   | FC701.PN000099.QMP | WEB           | FC7 | UATSD01     | ACCEPTED |

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



The screenshot shows the 'Search Results' window. The 'FILE SEARCH' section now displays 'File Reference Number' as '332' and 'Status' as 'ACCEPTED'. Below this is a 'Search Results' table with columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. A red box highlights the 'Status' column, and another red box highlights the 'CRN/Record ID' column.

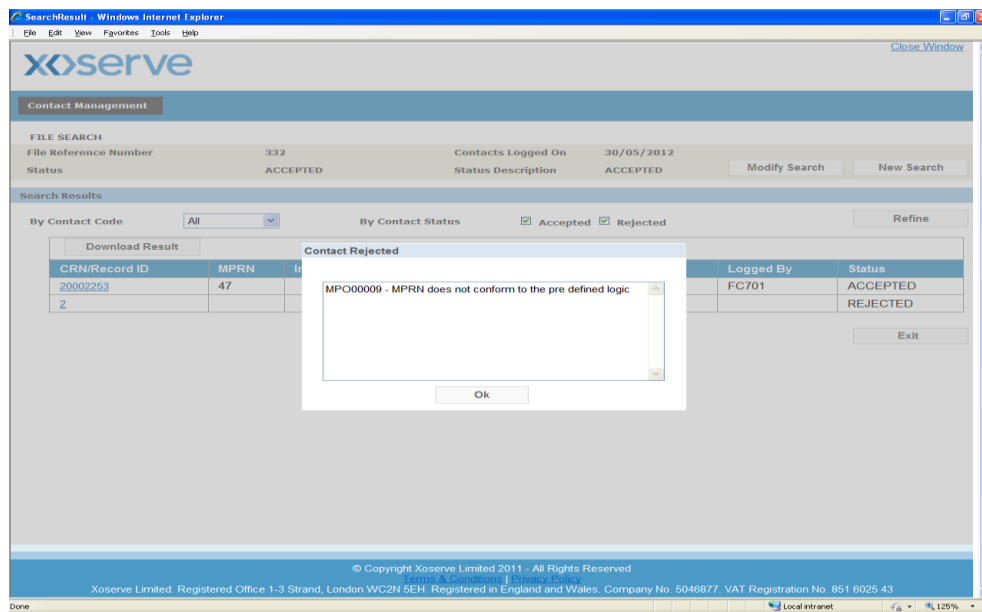
| CRN/Record ID            | MPRN | Invoice Number | Contact Code | Short Code | Logged By | Status   |
|--------------------------|------|----------------|--------------|------------|-----------|----------|
| <a href="#">20002253</a> | 47   |                | FOM          | FC7        | FC701     | ACCEPTED |
| <a href="#">2</a>        |      |                |              |            |           | 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.

## 6.4 File Search



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

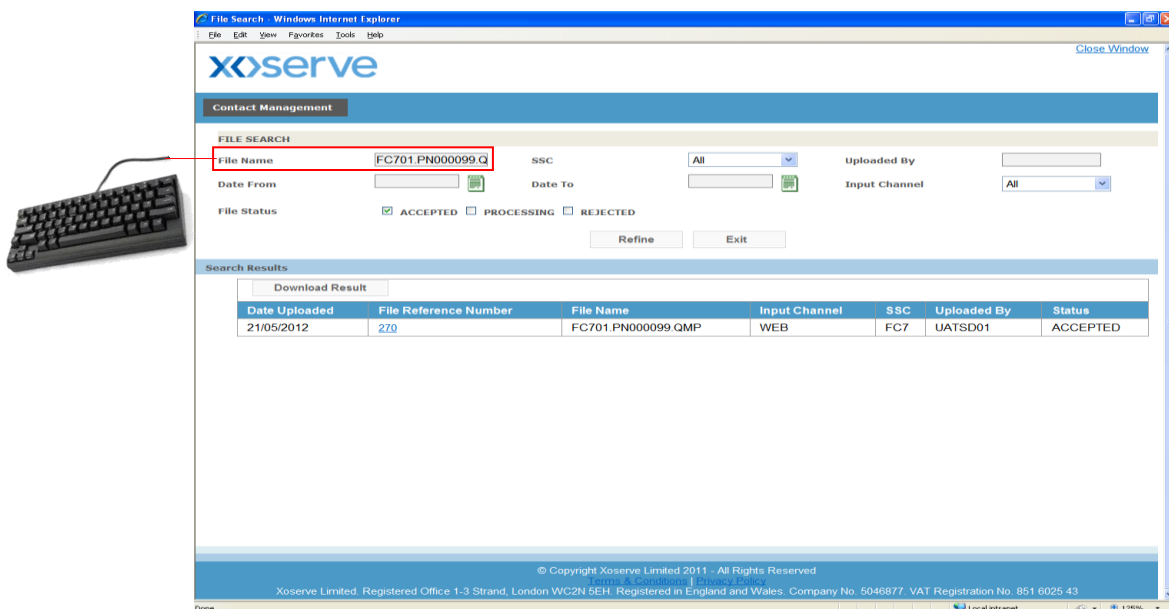
To complete a search using a specific file name

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows.

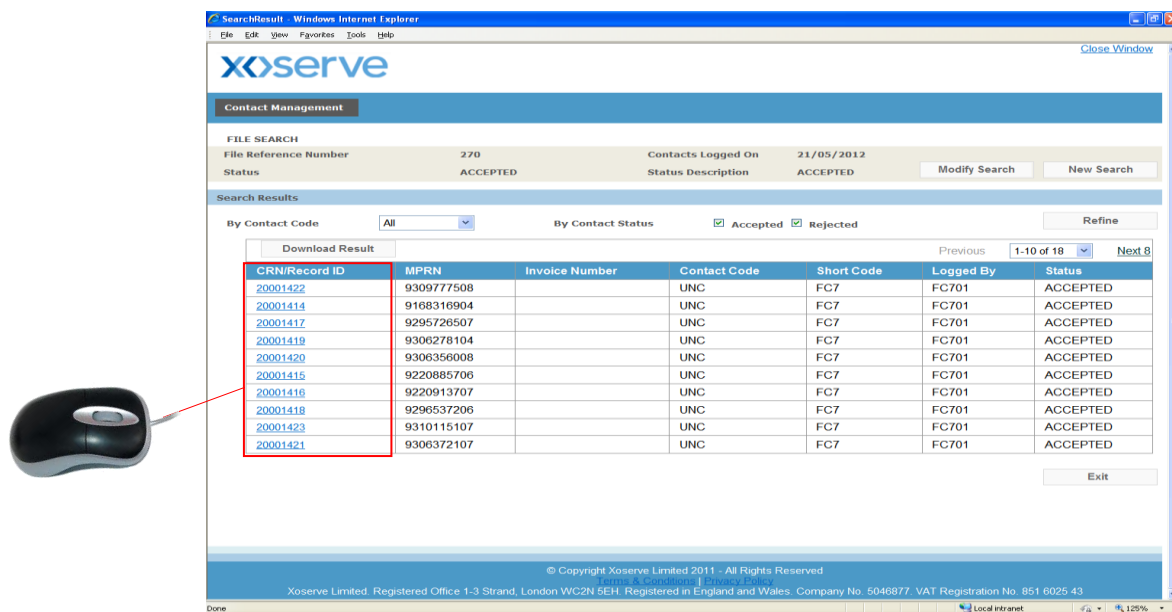


One of the File Status's must be selected in order for the search to bring back the appropriate results.

## 6.4 File Search

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

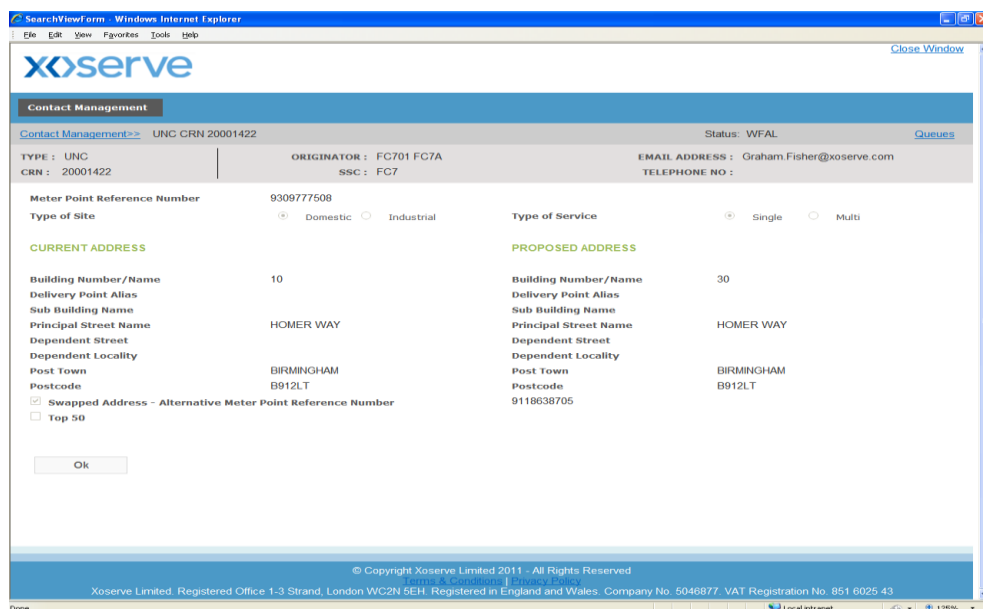
To drill down further, click on a specific Contact.



The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser. The 'FILE SEARCH' section displays 'File Reference Number: 270' and 'Status: ACCEPTED'. The 'Search Results' section shows a table of results with columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. A mouse cursor is pointing to the 'CRN/Record ID' column. The table lists 10 records, all with 'ACCEPTED' status.

| CRN/Record ID | MPRN       | Invoice Number | Contact Code | Short Code | Logged By | Status   |
|---------------|------------|----------------|--------------|------------|-----------|----------|
| 20001422      | 9309777508 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001414      | 9168316904 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001417      | 9295726507 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001419      | 9306278104 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001420      | 9306356008 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001415      | 9220885706 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001416      | 9220913707 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001418      | 9296537206 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001423      | 9310115107 |                | UNC          | FC7        | FC701     | ACCEPTED |
| 20001421      | 9306372107 |                | UNC          | FC7        | FC701     | ACCEPTED |

The Accepted Contact will appear as follows....

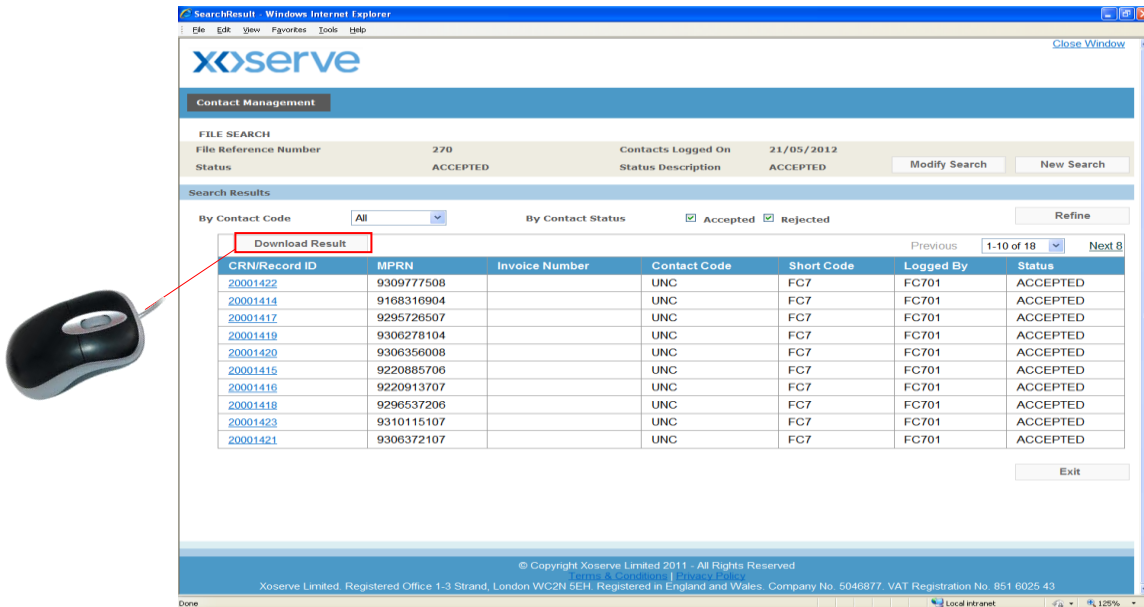


The screenshot shows the Xoserve SearchView form for Contact CRN 20001422. The form displays details for the contact, including the originator (FC701 FC7A), email address (Graham.Fisher@xoserve.com), and telephone number. It also shows the meter point reference number (9309777508) and the type of site (Domestic). The form is divided into two sections: CURRENT ADDRESS and PROPOSED ADDRESS, each with fields for Building Number/Name, Delivery Point Alias, Sub Building Name, Principal Street Name, Dependent Street, Dependent Locality, Post Town, and Postcode. The form includes an 'Ok' button at the bottom.

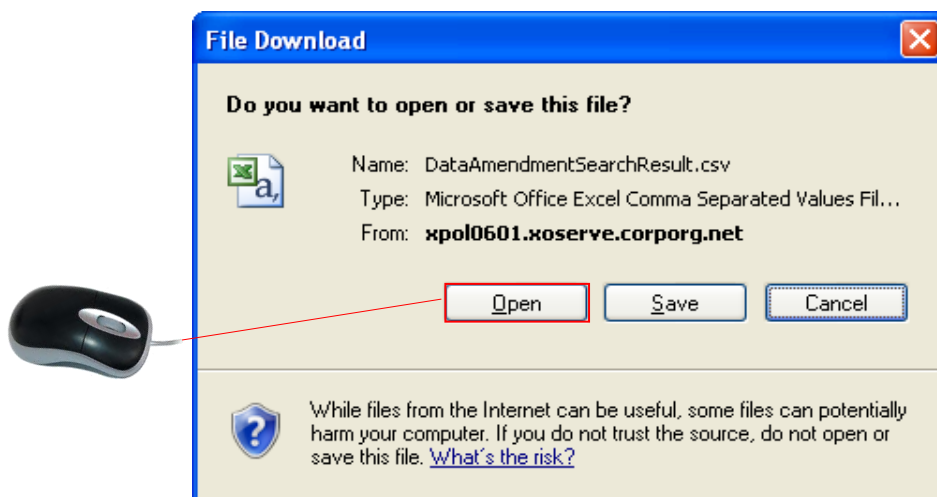
| Contact Management >> UNC CRN 20001422   |                         | Status: WFAL                              | Queues       |
|--|-------------------------|---|--------------|
| TYPE : UNC   | ORIGINATOR : FC701 FC7A | EMAIL ADDRESS : Graham.Fisher@xoserve.com |              |
| CRN : 20001422   | SSC : FC7               | TELEPHONE NO :                            |              |
| Meter Point Reference Number   | 9309777508              | Type of Service                           | Single Multi |
| Type of Site   | Domestic Industrial     |   |              |
| CURRENT ADDRESS  |                         | PROPOSED ADDRESS                          |              |
| Building Number/Name   | 10                      | Building Number/Name                      | 30           |
| Delivery Point Alias   |                         | Delivery Point Alias                      |              |
| Sub Building Name  |                         | Sub Building Name                         |              |
| Principal Street Name  | HOMER WAY               | Principal Street Name                     | HOMER WAY    |
| Dependent Street   |                         | Dependent Street                          |              |
| Dependent Locality   |                         | Dependent Locality                        |              |
| Post Town  | BIRMINGHAM              | Post Town                                 | BIRMINGHAM   |
| Postcode   | B912LT                  | Postcode                                  | B912LT       |
| <input checked="" type="checkbox"/> Swapped Address - Alternative Meter Point Reference Number |                         | 9118638705                                |              |
| <input type="checkbox"/> Top 50  |                         |   |              |
| Ok   |                         |   |              |

## 6.5 Download results

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



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 7**

## **Previously Submitted Contacts**

## 7.1 Raising a Previously Submitted Contact

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

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

The screenshot shows a web browser window titled 'SearchViewForm - Windows Internet Explorer'. The page is for 'Xoserve' and displays 'Contact Management' details for 'UNC CRN 20004804'. The status is 'CLR'D'. The page includes fields for 'TYPE', 'CRN', 'ORIGINATOR', 'SSC', 'EMAIL ADDRESS', and 'TELEPHONE NO'. It also shows 'CURRENT ADDRESS' and 'PROPOSED ADDRESS' details. A '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'. At the bottom right, there is a 'Challenge Resolution' button highlighted with a red box. A red line points from this button to a mouse cursor icon below the screenshot.



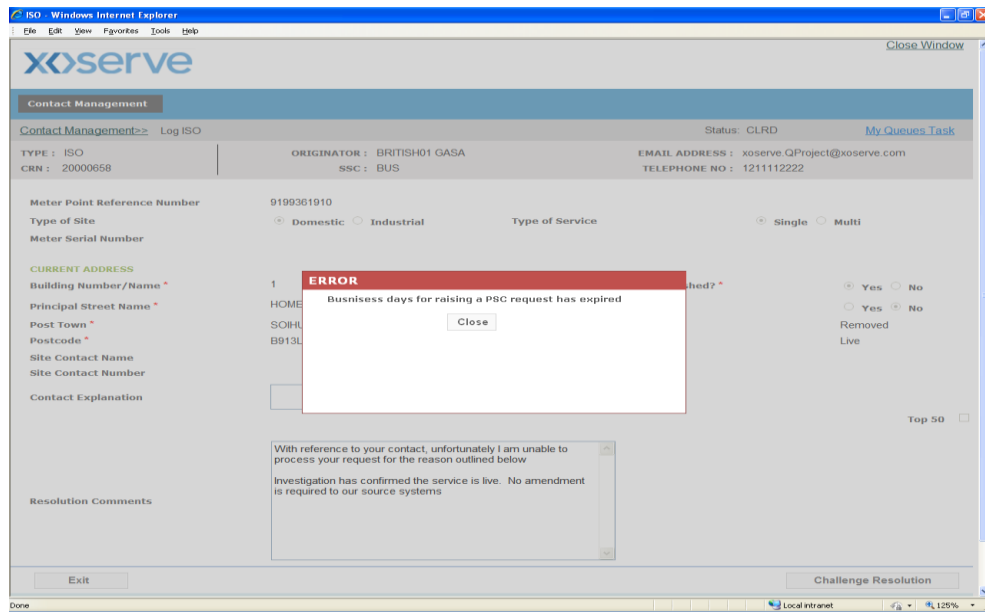
You are not able to edit any details on this screen



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

## 7.1 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....

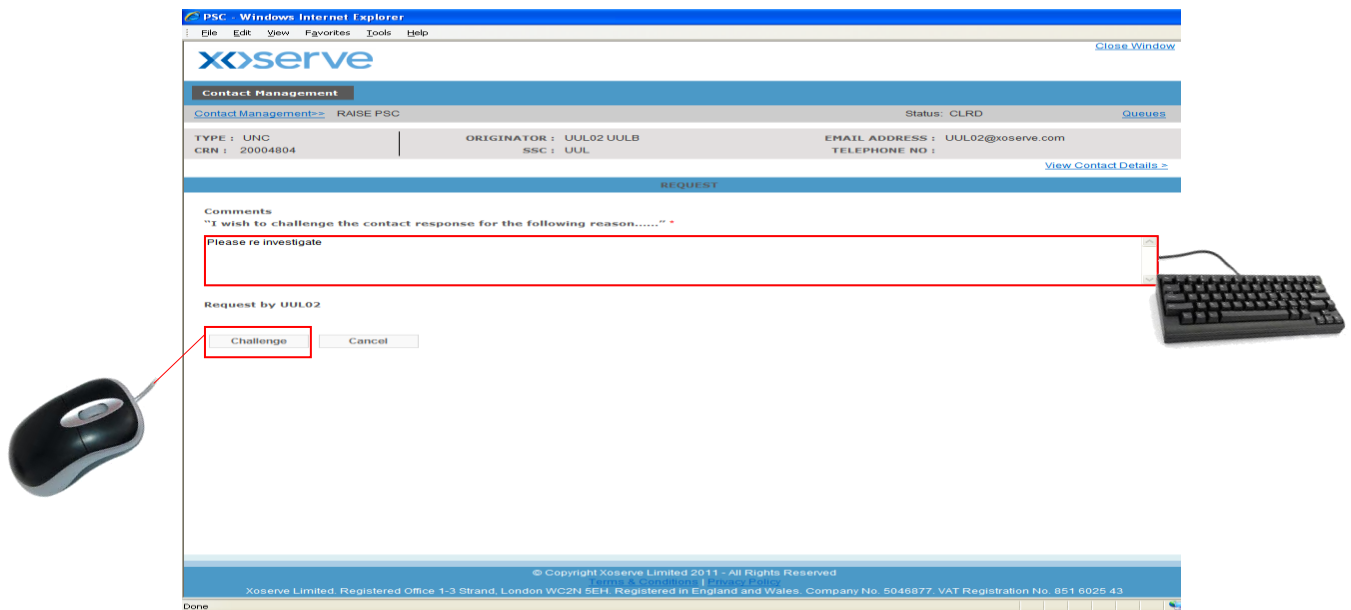


## 7.1 Raising a Previously Submitted Contact


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.

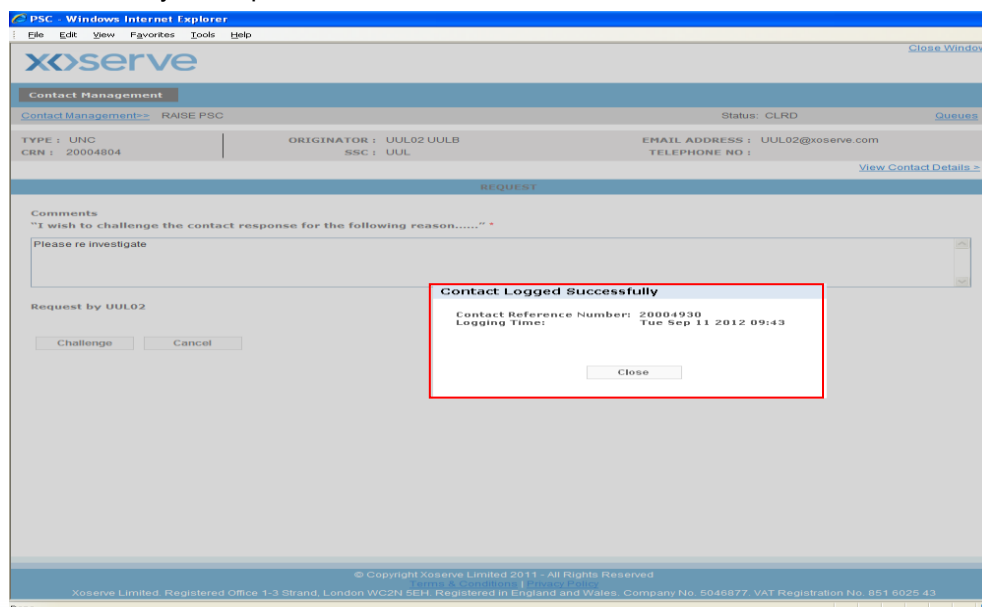


The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser. The page title is 'PSC - Windows Internet Explorer'. The Xoserve logo is at the top. Below the logo, there's a 'Contact Management' section with a 'RAISE PSC' button. The status is 'CLR'D'. The contact details are: TYPE: UNC, CRN: 20004804, ORIGINATOR: UUL02 UULB, SSC: UUL, EMAIL ADDRESS: UUL02@xoserve.com, and TELEPHONE NO: . A 'View Contact Details >' link is present. The 'REQUEST' section has a 'Comments' field with the text 'I wish to challenge the contact response for the following reason.....' and a text area containing 'Please re investigate'. Below the comments, there's a 'Request by UUL02' section with '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 'PSC - Windows Internet Explorer'. The Xoserve logo is at the top. Below the logo, there's a 'Contact Management' section with a 'RAISE PSC' button. The status is 'CLR'D'. The contact details are: TYPE: UNC, CRN: 20004804, ORIGINATOR: UUL02 UULB, SSC: UUL, EMAIL ADDRESS: UUL02@xoserve.com, and TELEPHONE NO: . A 'View Contact Details >' link is present. The 'REQUEST' section has a 'Comments' field with the text 'I wish to challenge the contact response for the following reason.....' and a text area containing 'Please re investigate'. Below the comments, there's a 'Request by UUL02' section with 'Challenge' and 'Cancel' buttons. A message box is displayed in the center of the screen, titled 'Contact Logged Successfully'. The message box contains the text: 'Contact Reference Number: 20004930', 'Logging Time: Tue Sep 11 2012 09:43', and a 'Close' button. A red box highlights the message box.

## 7.2 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 interface in a web browser. The page title is "Contact Management" and the status is "CLR". The contact details are as follows:

| Contact Management |                         | Status: CLR                       |  | Queues |
|--------------------|-------------------------|-----------------------------------|--|--------|
| TYPE : UNC         | ORIGINATOR : UUL01 UULA | EMAIL ADDRESS : UUL01@xoserve.com |  |        |
| CRN : 20004930     | SSC : UUL               | TELEPHONE NO :                    |  |        |

**Meter Point Reference Number** 2783470909

**Type of Site** ☒ Domestic ☐ Industrial

**Type of Service** ☒ Single ☐ Multi

**CURRENT ADDRESS**

|                       |            |
|-----------------------|------------|
| Building Number/Name  | 11         |
| Delivery Point Alias  |            |
| Sub Building Name     |            |
| Principal Street Name | HOMER ROAD |
| Dependent Street      |            |
| Post Town             | SOLIHULL   |
| Postcode              | B913LT     |

☐ Swapped Address - ☐ Top 50

**PROPOSED ADDRESS**

|                       |            |
|-----------------------|------------|
| Building Number/Name  | PLOT 1     |
| Delivery Point Alias  |            |
| Sub Building Name     |            |
| Principal Street Name | HOMER ROAD |
| Dependent Street      |            |
| Post Town             | SOLIHULL   |
| Postcode              | B913LT     |

**Resolution Comments**

With reference to your contact, I am pleased to inform you that your request has been actioned  
Address Accepted  
Thank you for raising this contact and I hope it is resolved to your satisfaction

Exit

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