Contact Management User Guide DMSP Edition

Version 2.0

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Introduction

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

The guide contains:-

⇒ How to log on to the system and accessing the Contact Management Home Page

⇒ Raising Data Clarification requests and managing the responses

⇒ How to conduct searches

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

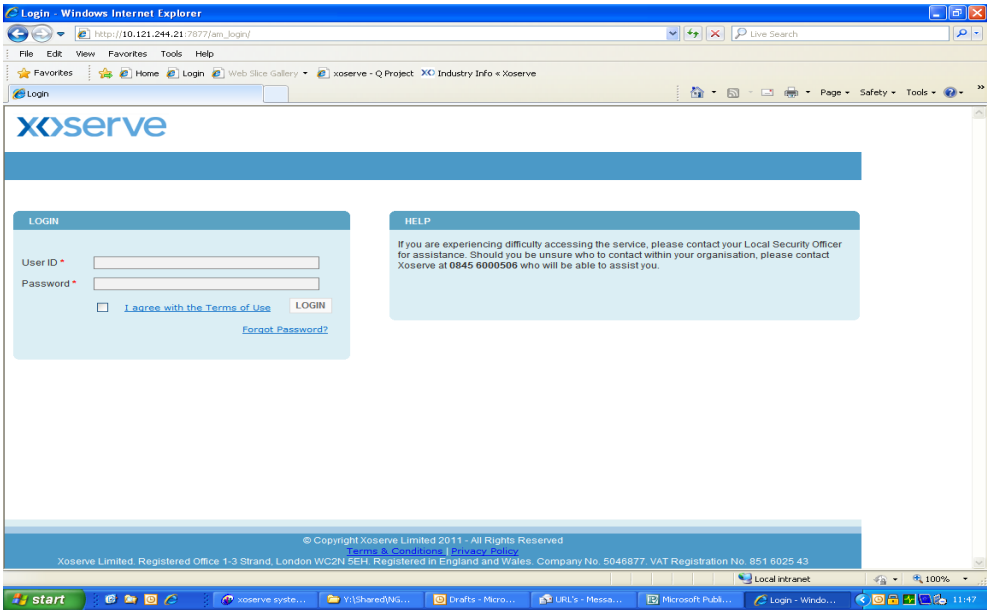
Keyboard entry required

Section 2

Log onto Contact Management

2.1 Log onto the Contact Management system

The portal Login Page looks as follows….

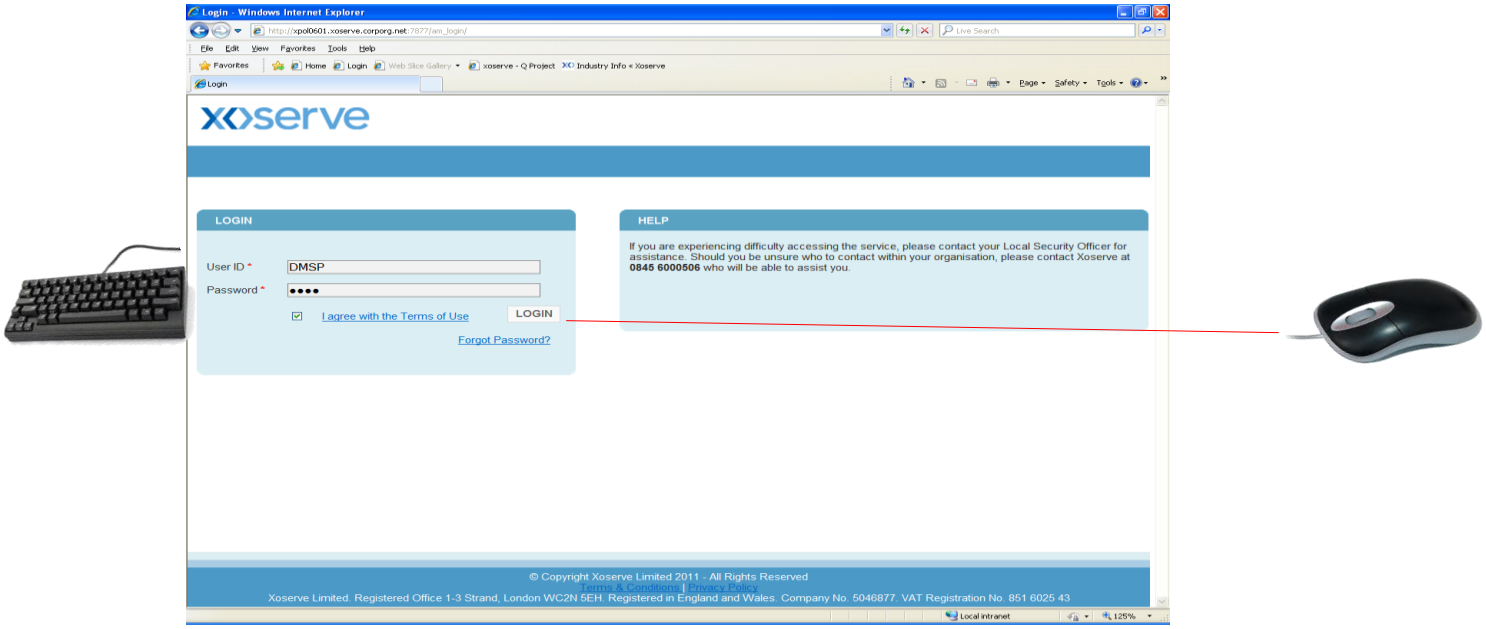


Step 1 – Enter your User ID

Step 2 – Enter your Password

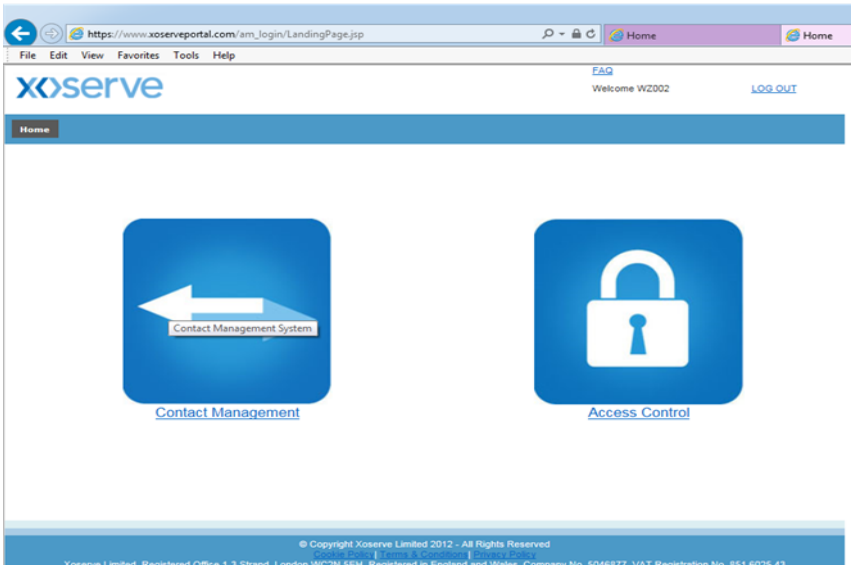
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



2.2 Contact Management Service Page

The following Service Page will appear….

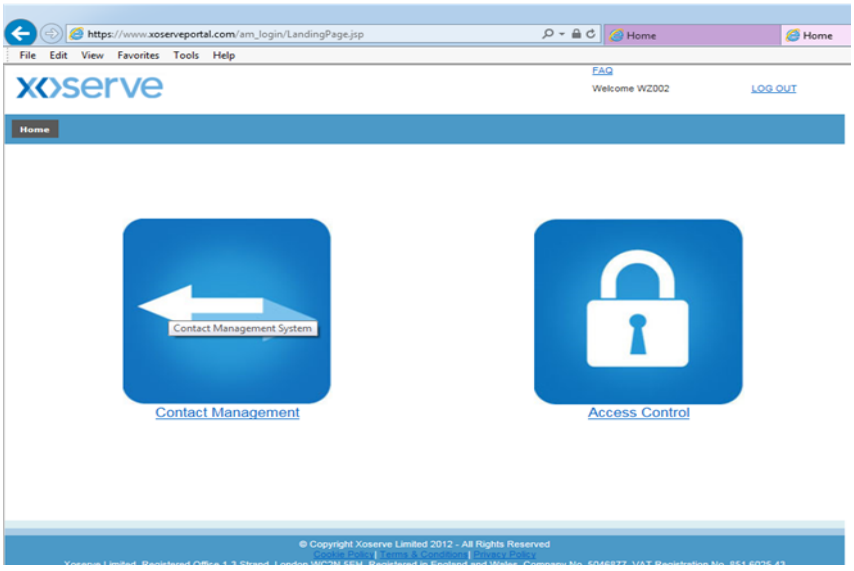


There are two services on this page:-

⇒ Contact Management

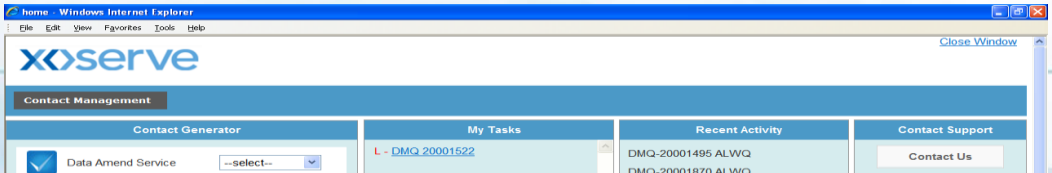
⇒ Access Controls

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

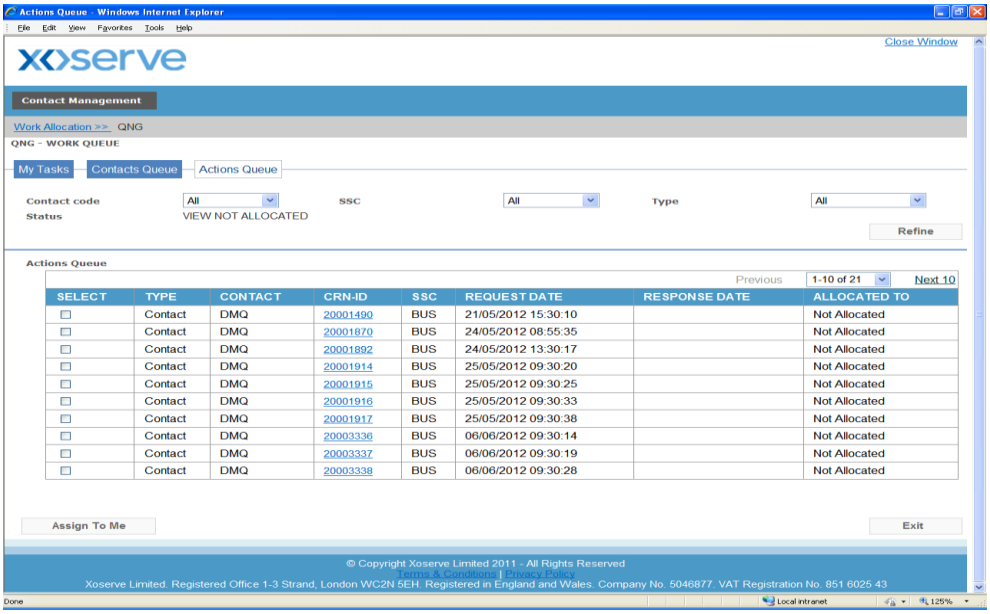
Search Options – This section includes a variety of search facilities. Contact Reference Number Search and Advanced Search will find Contacts raised in The Contact Management system. Data Clarification search returns Contacts that are currently at DC stage of the process.

Section 3

Contacts Queue

3.1 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 and work outstanding. This will show as follows….



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 is not applicable to you.

Action Queue

This is a general queue holding a number of Contacts sent by Xoserve and require attention from yourselves. The Contacts within this Queue are the result of a Contact raised by a Shipper.

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

3.2 Assigning a Contact

Actions Queue

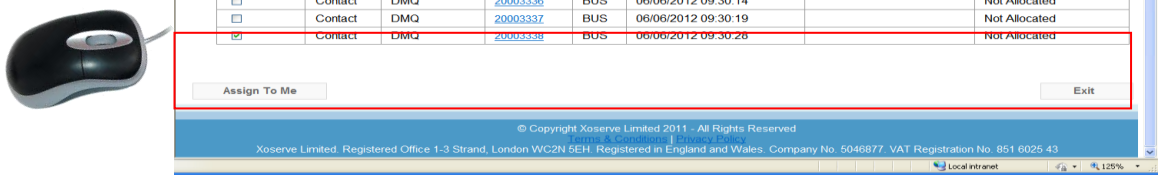
The Action Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue are the result of a Contact raised by a Shipper.

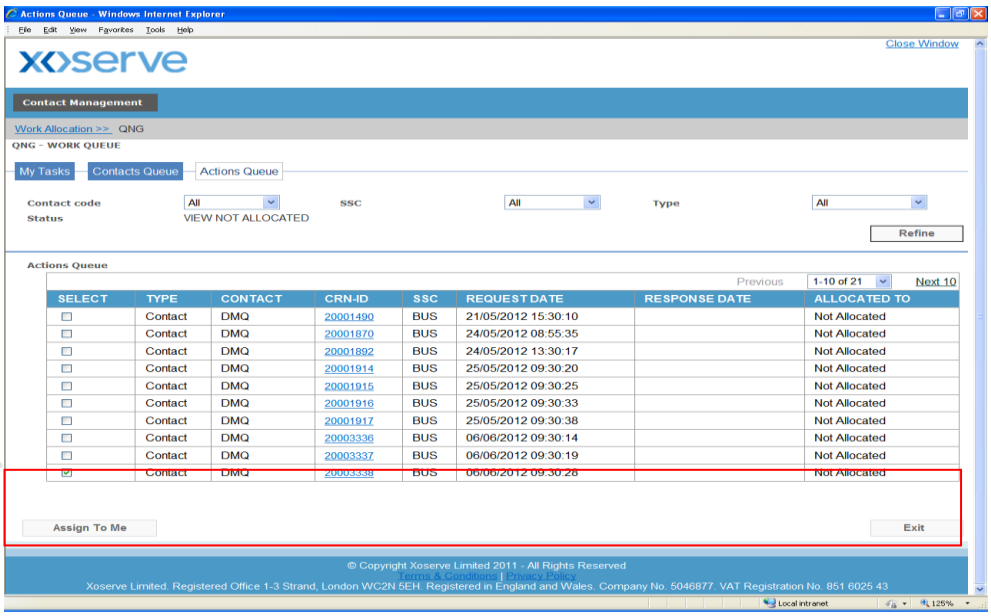
Assign a Contact

Step 1 – Find the Contact in the queue

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

Step 3 – Click Assign To Me.





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

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

3.3 Transferring Contacts

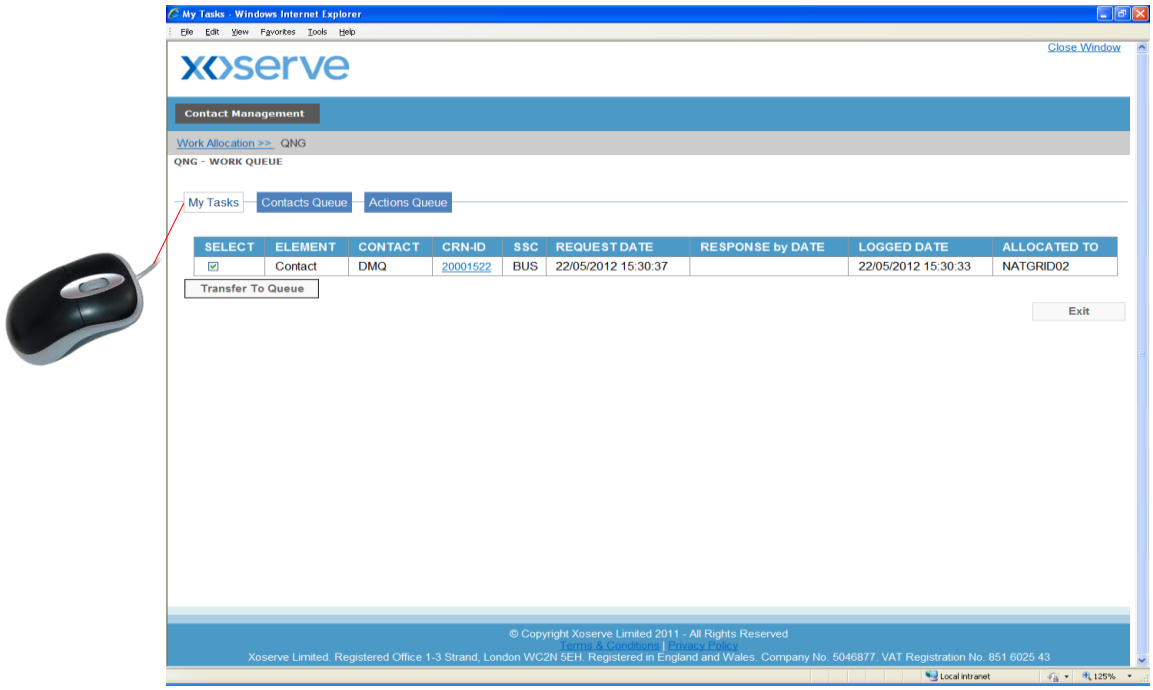
My Tasks

Transfer a Contact to the Action Queue

Step 1 – Find your Contact via your My Task 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.

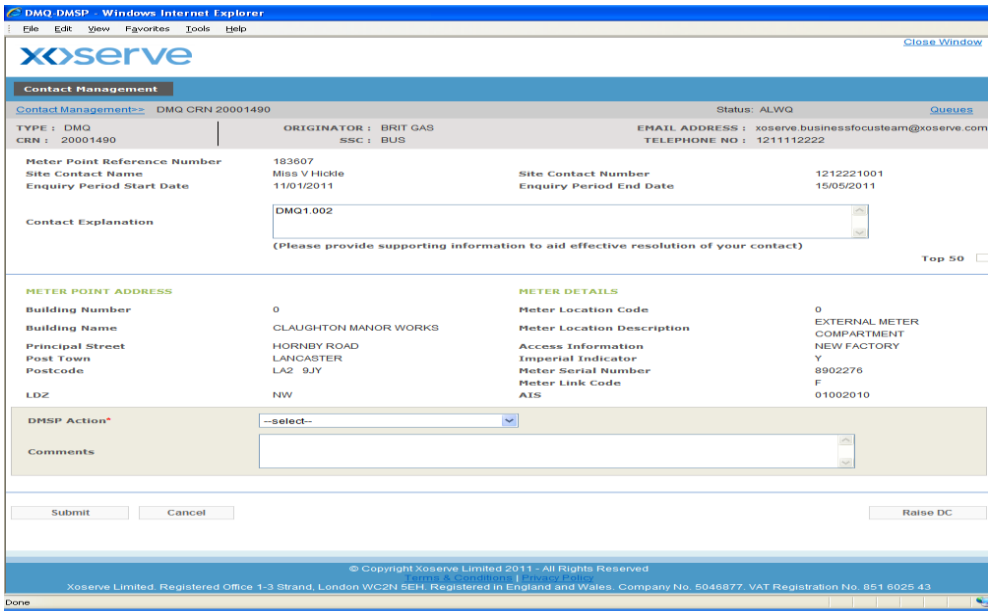
Section 4

Correspondence

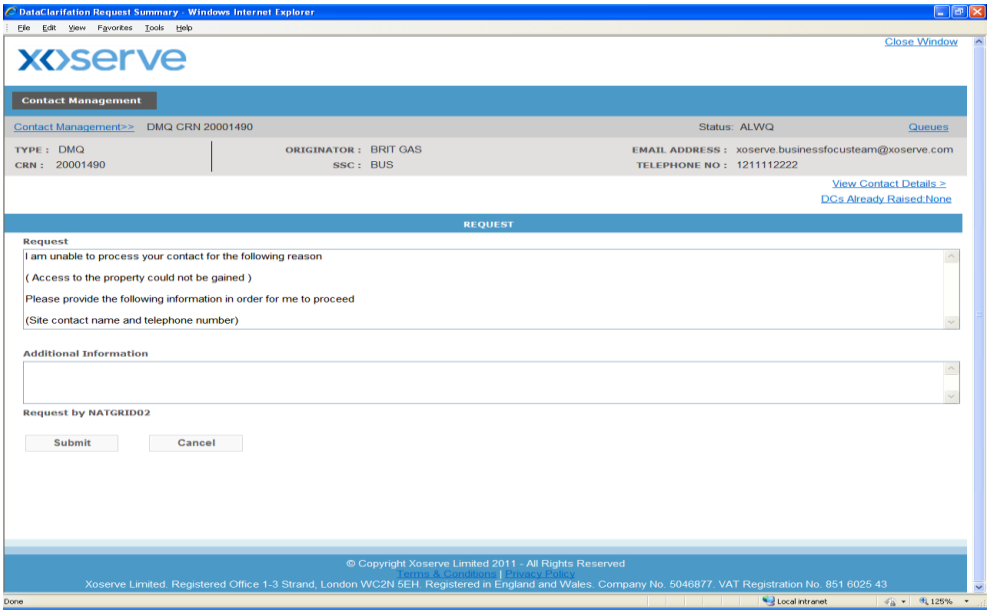
4.1 Raising a Data Clarification Request

As part of your investigation, you may need to send a Data Clarification Request.

Your Contact will appear as shown below including the relevant detail; click Raise DC.



The DC screen will appear. Enter the requested information and click submit, this is then sent to the originating Shipper who raised the Contact.

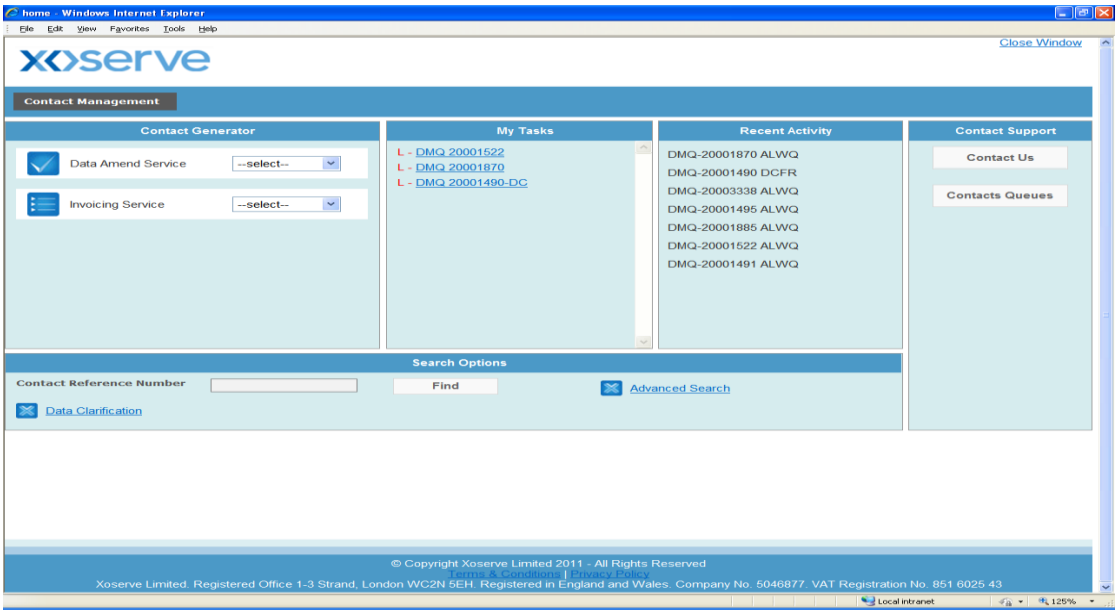


The Data Clarification Request is a point-to-point communication between the Contact Originator and the Contact Handler.

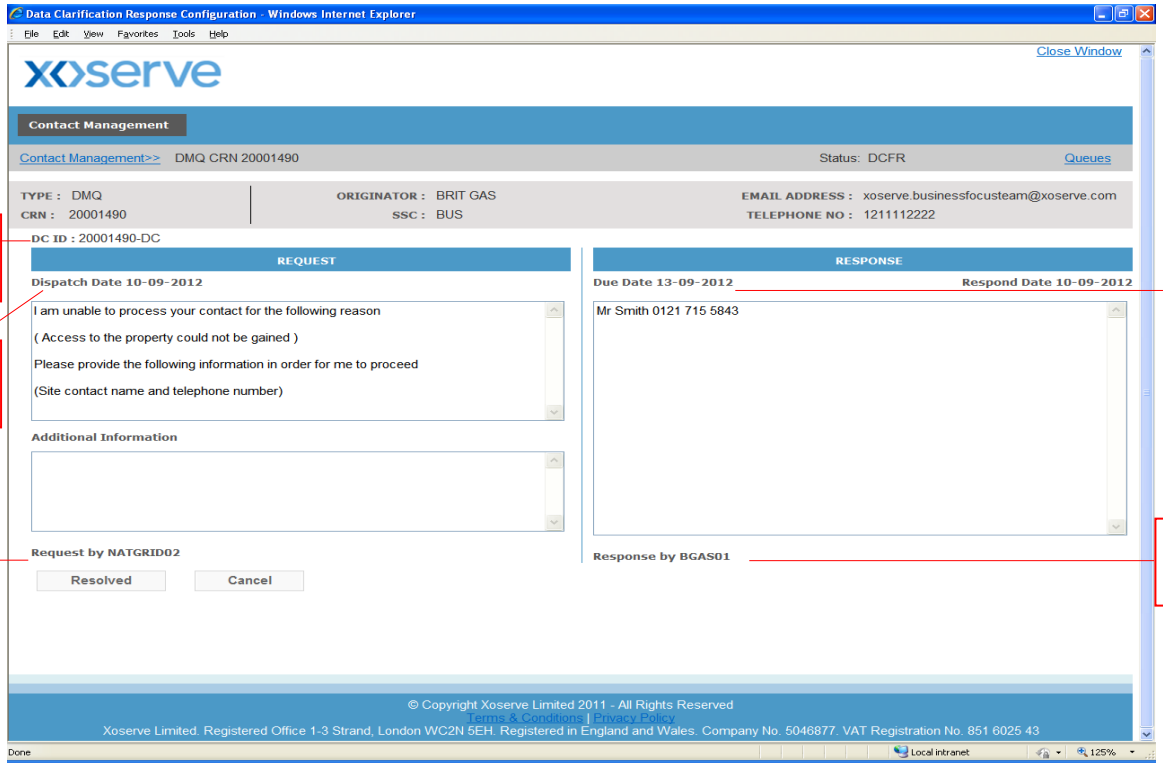
The format of the reference number consists of the Contact Type, the Contact Reference number, the correspondence type (DC) and the count (1 or 2)

4.2 Receiving a Data Clarification Response

Once a DC has been responded to the Contact will become visible in your My Tasks.



When the Contact is selected the Contact opens and the DC screen appears.



DC ID is an identifier for the original Contact.

Dispatch Date is the day the DC was sent.

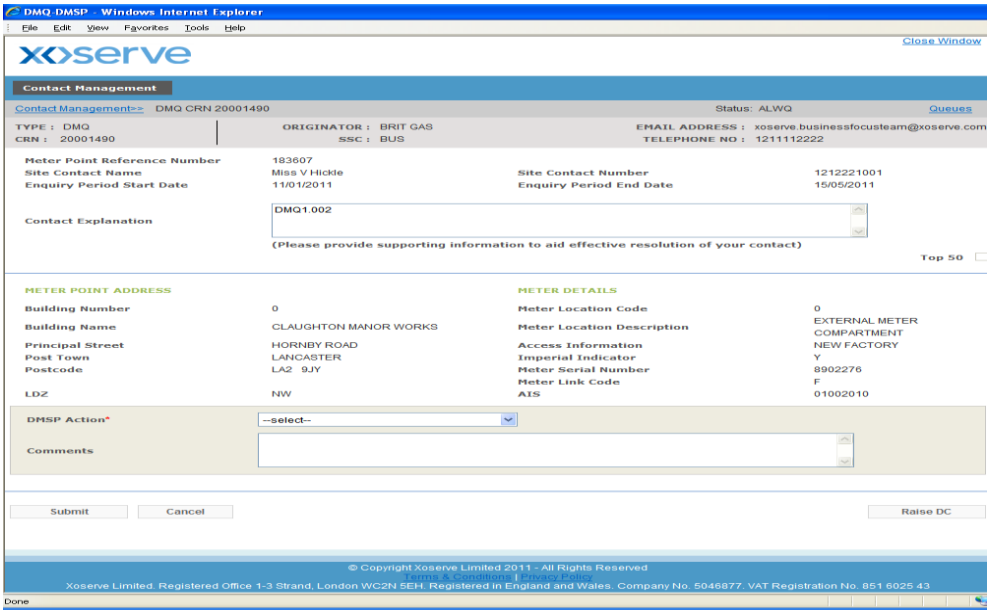
'Request by' will identify the Contact Handler.

This is when the DC needs to be responded by.

This is who has responded to the DC.

Click resolve and you are taken back to the original Contact.

4.2 Receiving a Data Clarification Response



If you are satisfied with the response click resolve and complete the resolution for the Contact. If you require further clarification click raise DC and enter the relevant information into the DC request template.

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

Following the second DC raised, if you have still not gained the information you require close the Contact as invalid.

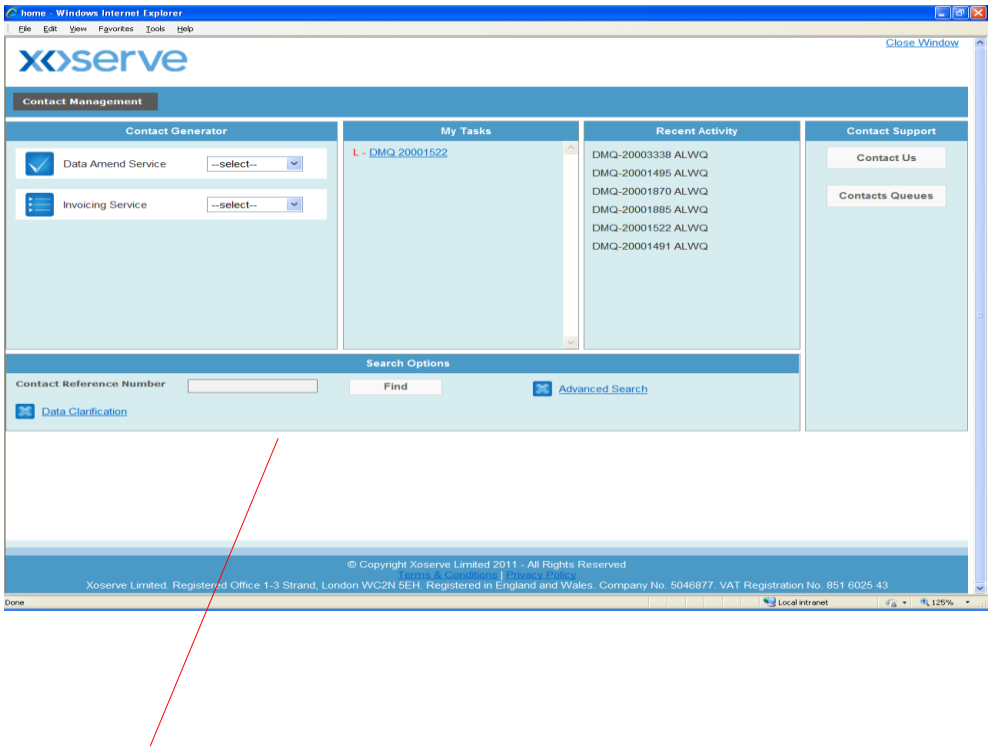
Section 5

Search Facilities

5.1 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 options, these are:

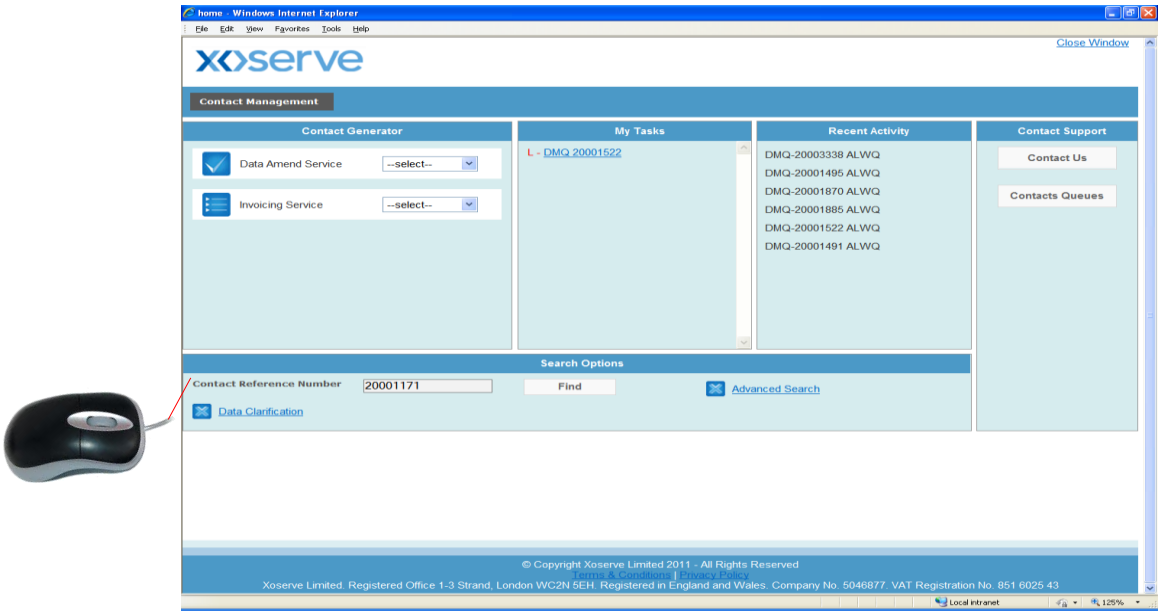
Basic Search – Pinpointing a Contact by Contact Reference Number

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

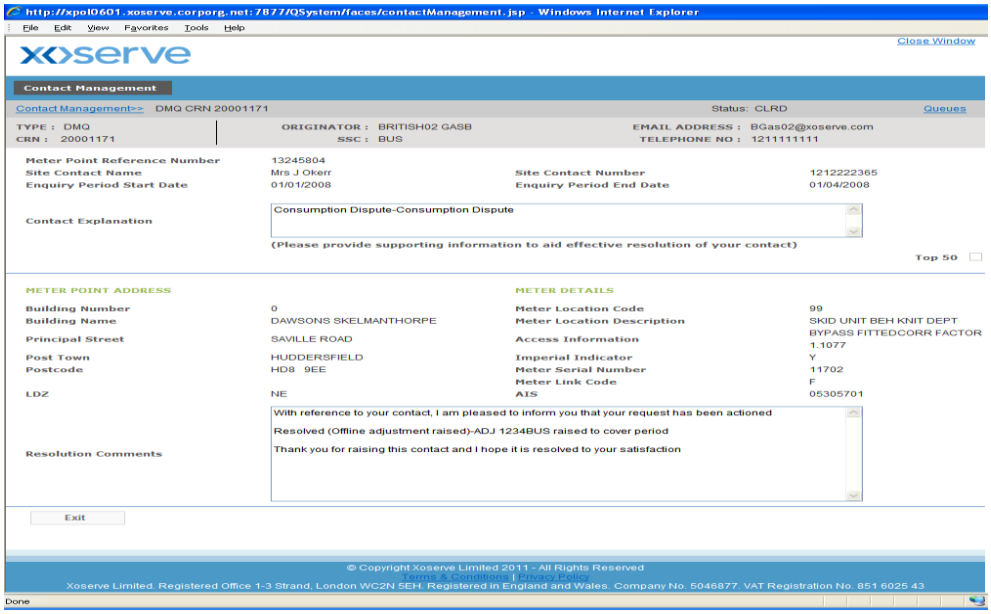
Data Clarification Search – Searching for a Contact currently at DC status or has passed through the DC status.

5.2 Basic Search

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



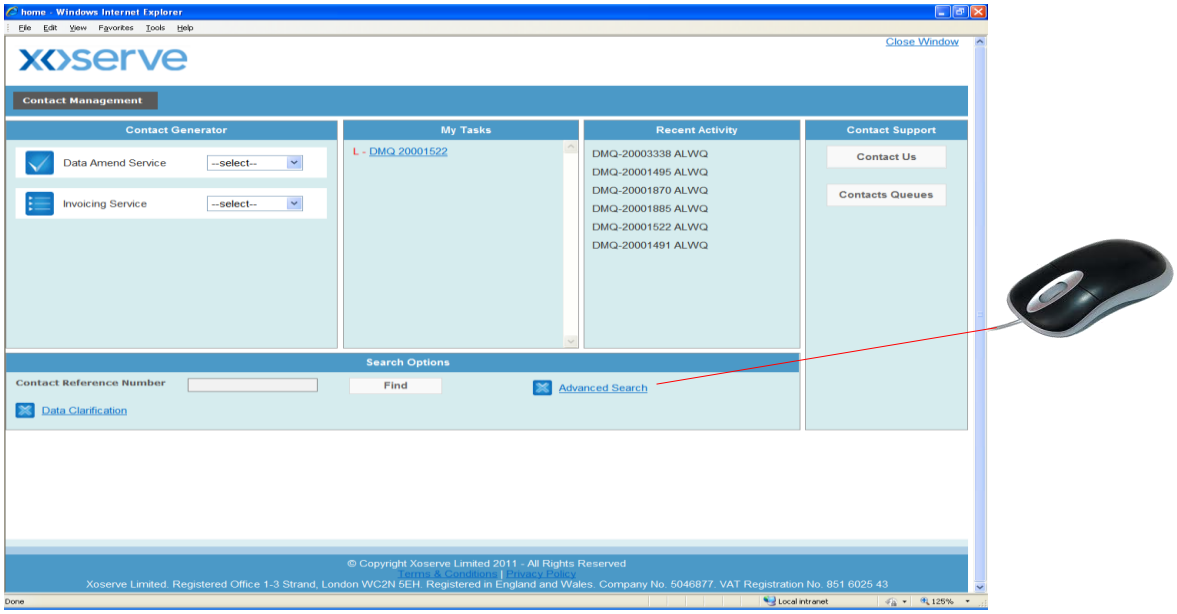
The following results will appear presenting the details of the Contact….



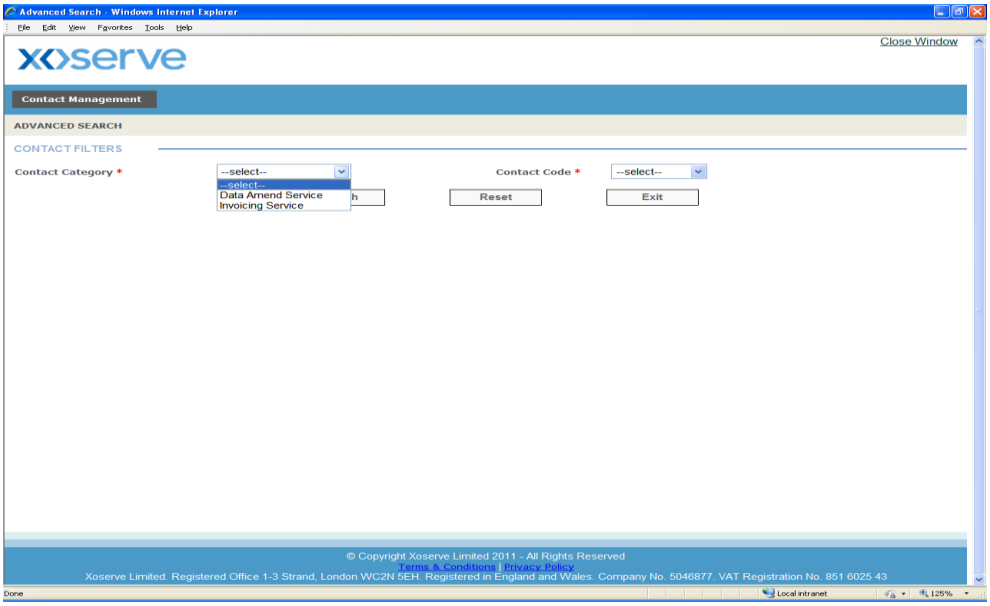
You can not edit this Contact: it is read only.

5.3 Advanced Search

To retrieve information on Contacts, click Advanced Search.

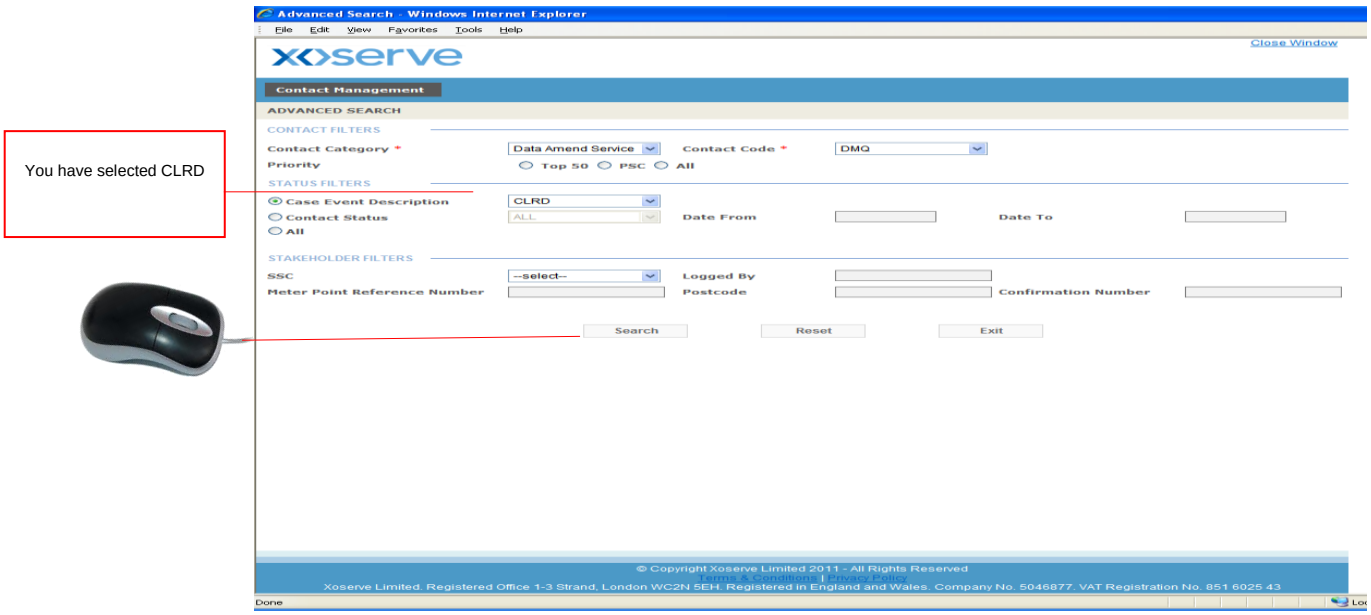


You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.



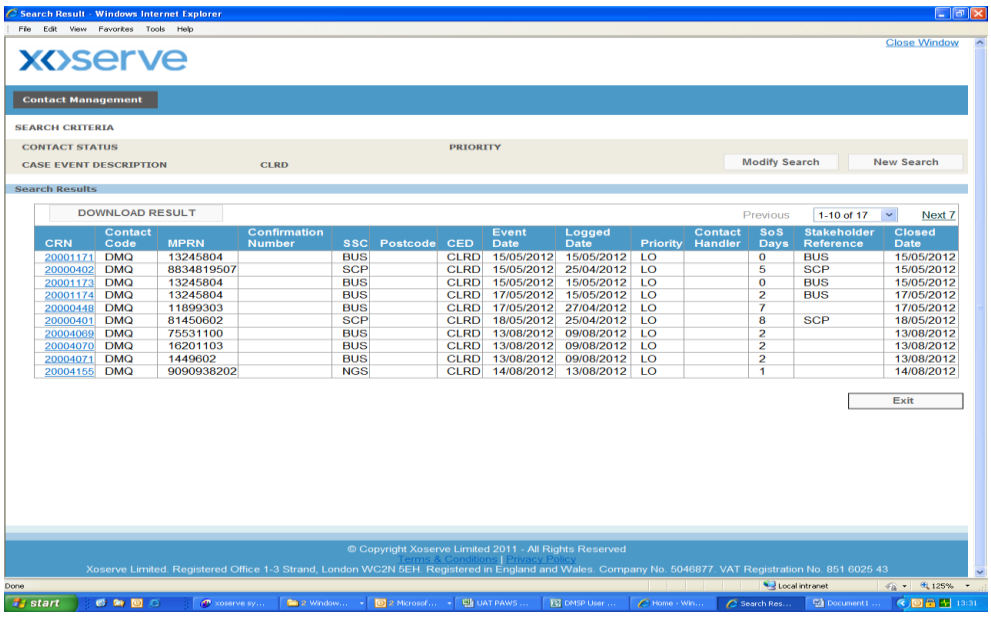
5.3 Advanced Search

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



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

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

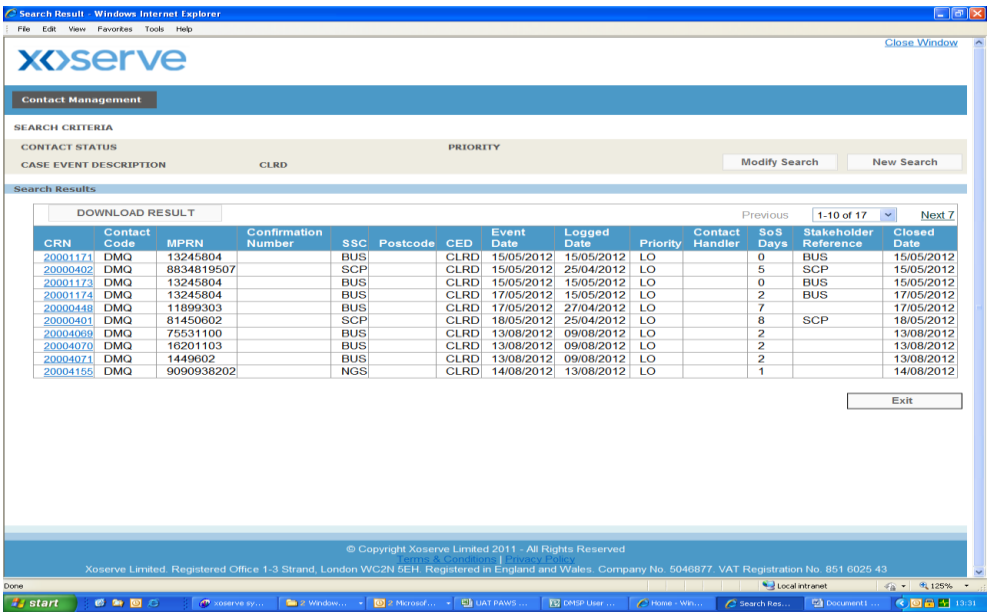


Select the relevant CRN you require and the Contact will appear showing the Contact details and the resolution for the Contact.

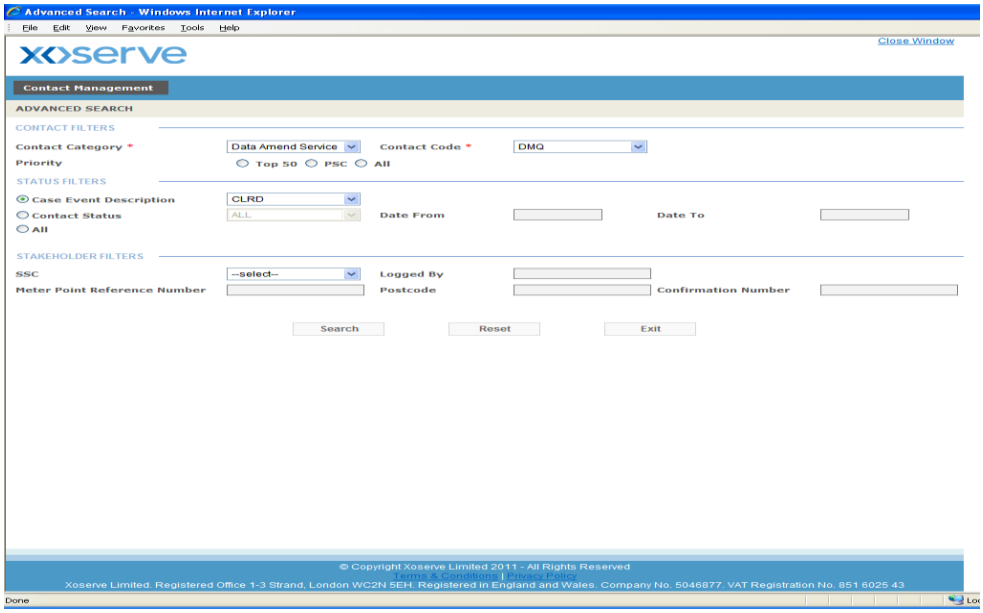
5.3 Advanced Search

Modify Search

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



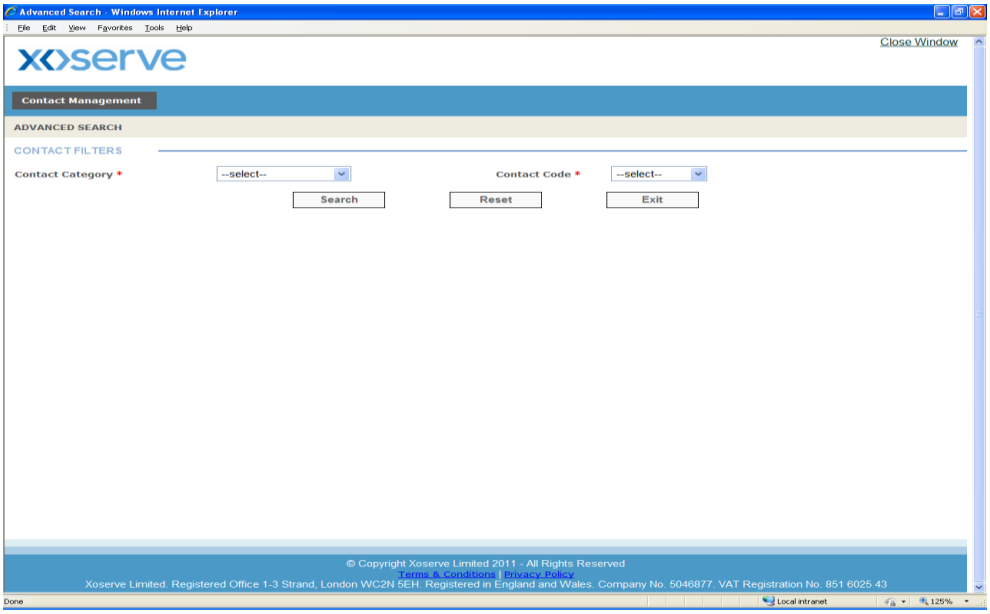
Modify Search will take you back to the initial search you have entered. From here the search criteria can be amended.



5.3 Advanced Search

New Search

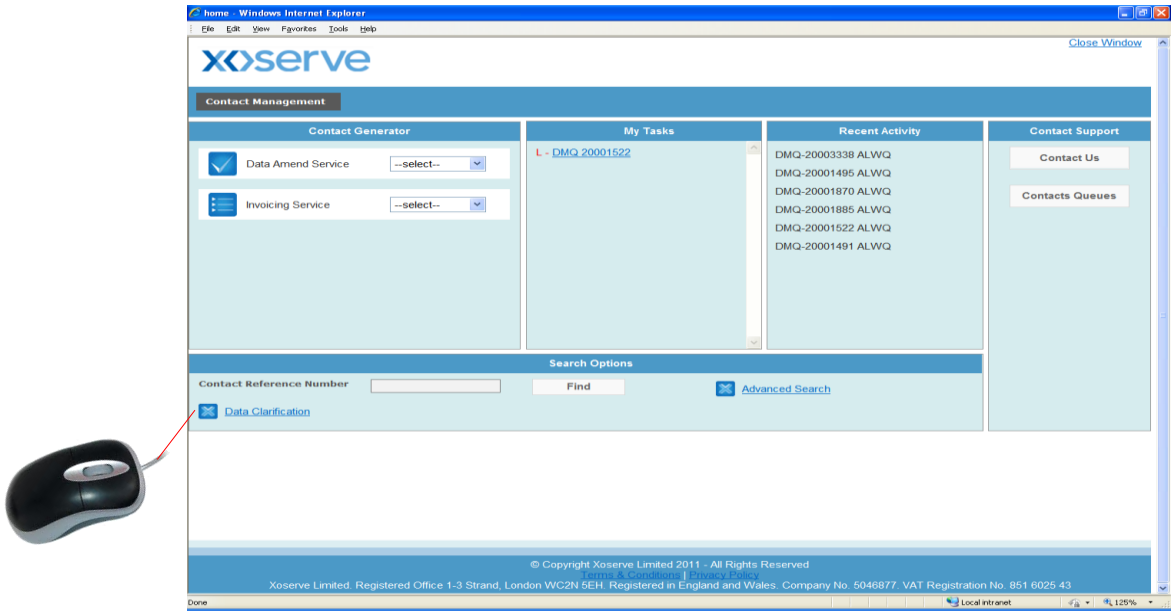
New Search takes you to the original search screen to complete a brand new search with new data.



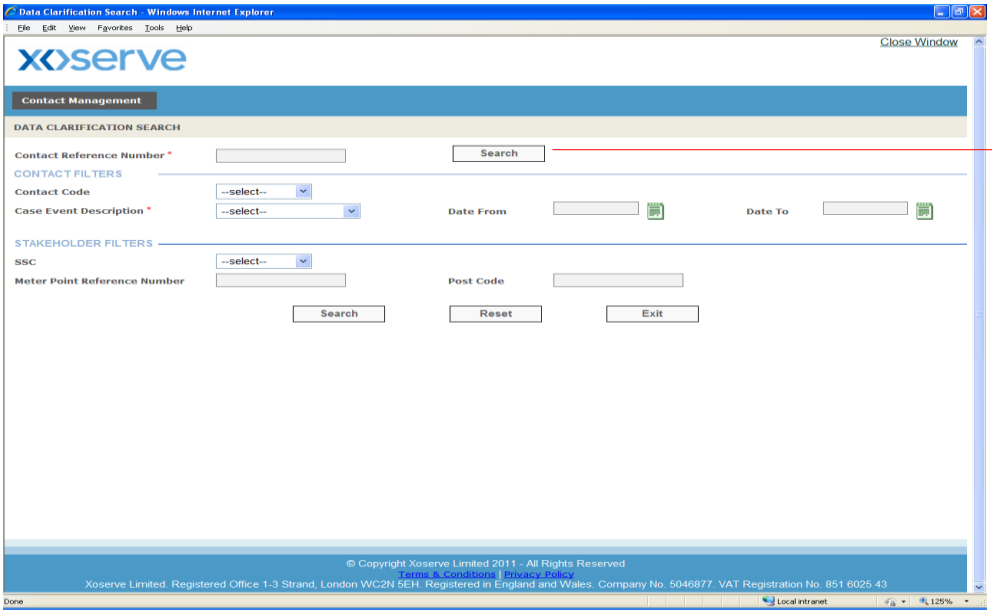
You will need to repeat the selection step demonstrated on page 21. To pick a Contact Category and the Contact Code you require.

5.4 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.



This search button is for the basic search.

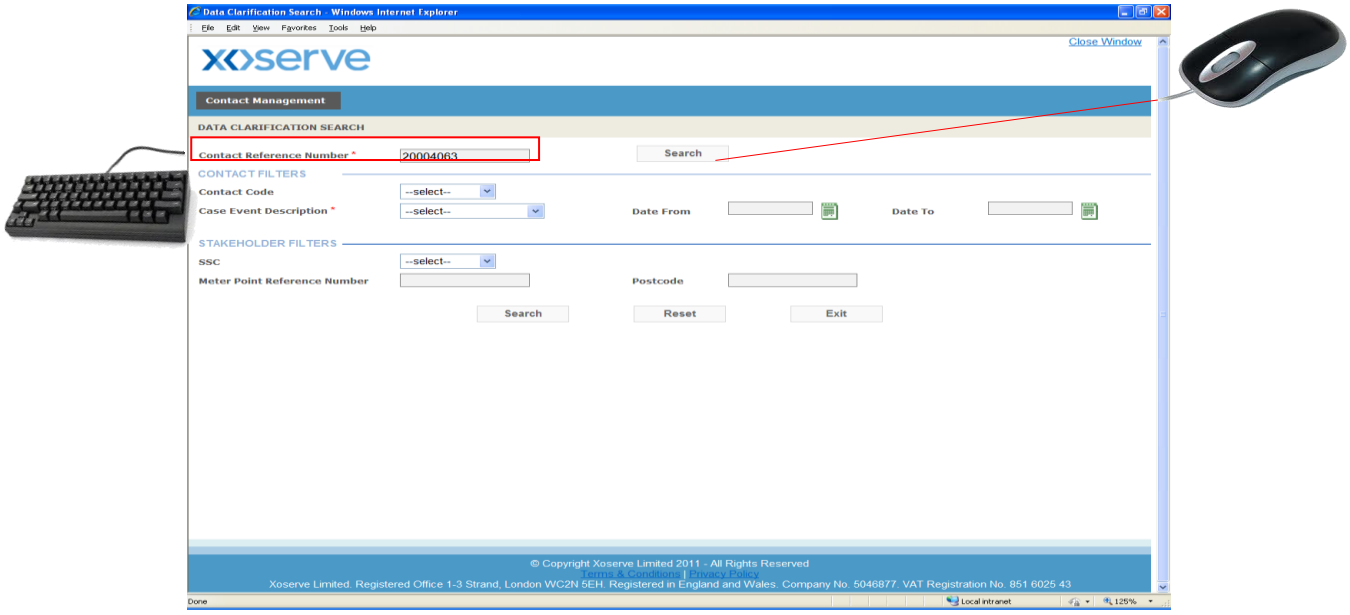
Search can be completed via CRN or various Filters . CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

5.4 Data Clarification Search

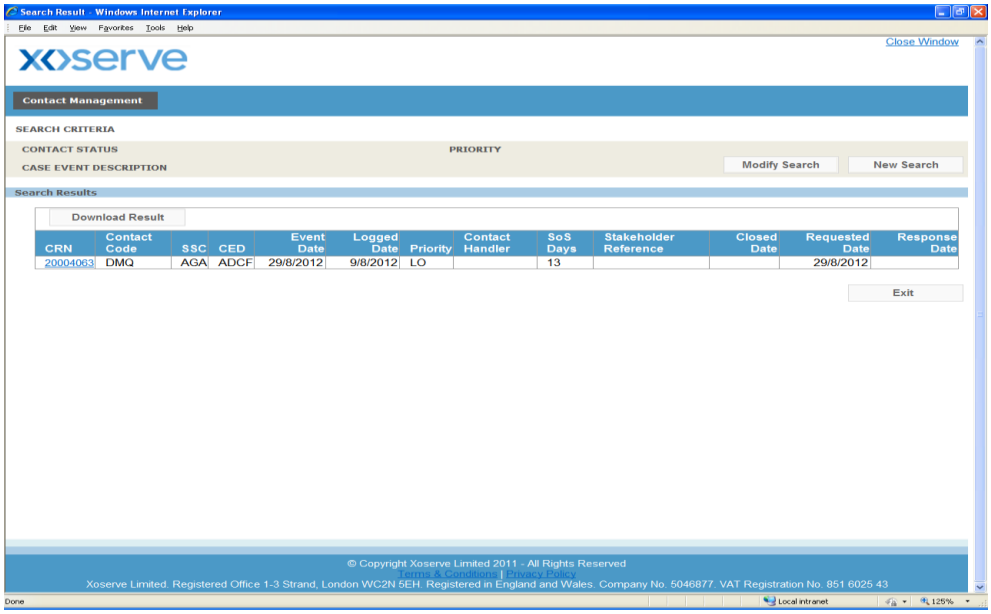
Basic Search

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

Step 2 – Click Search.



The results will be displayed as follows….



Select the CRN and the Data Clarification form will appear.

5.4 Data Clarification Search

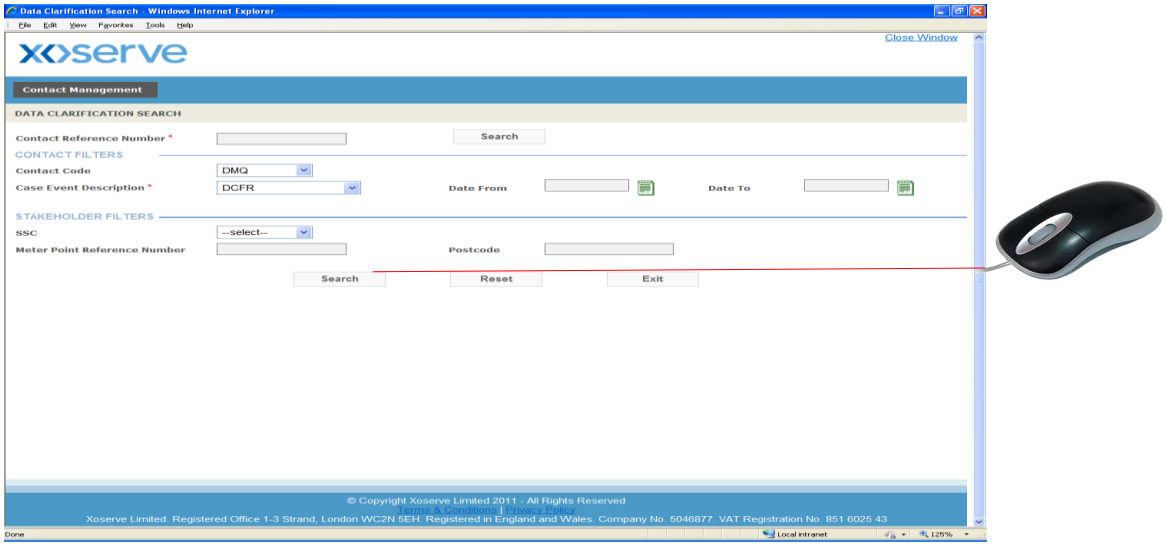
Case event description allows you to search for a DC outstanding with the Shipper.

Filter Search

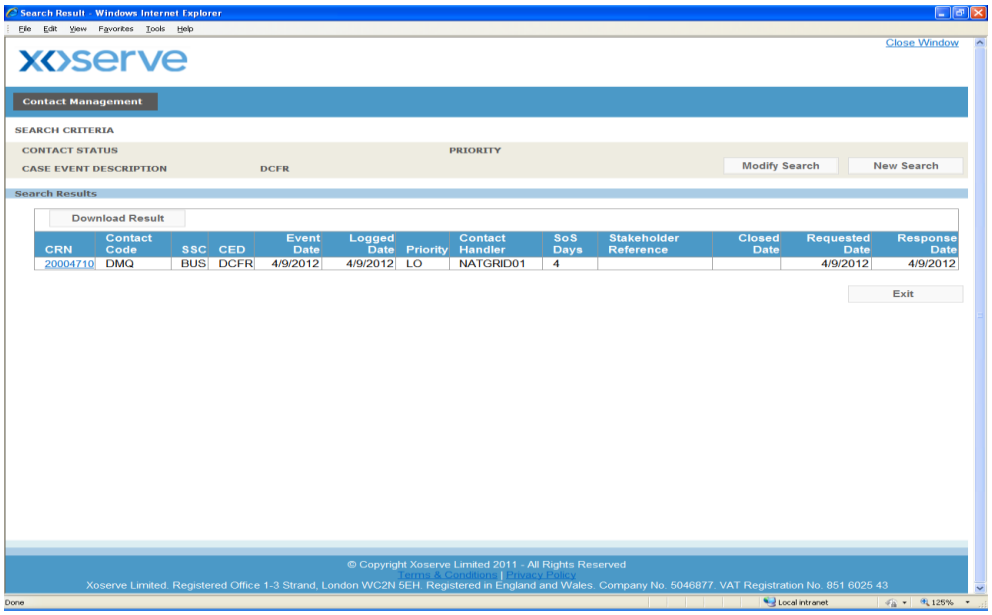
Step 1 – Enter your required information into the Contact Filters section

Step 2 – Click Search

Further search criteria are available in the Stakeholder Filters section



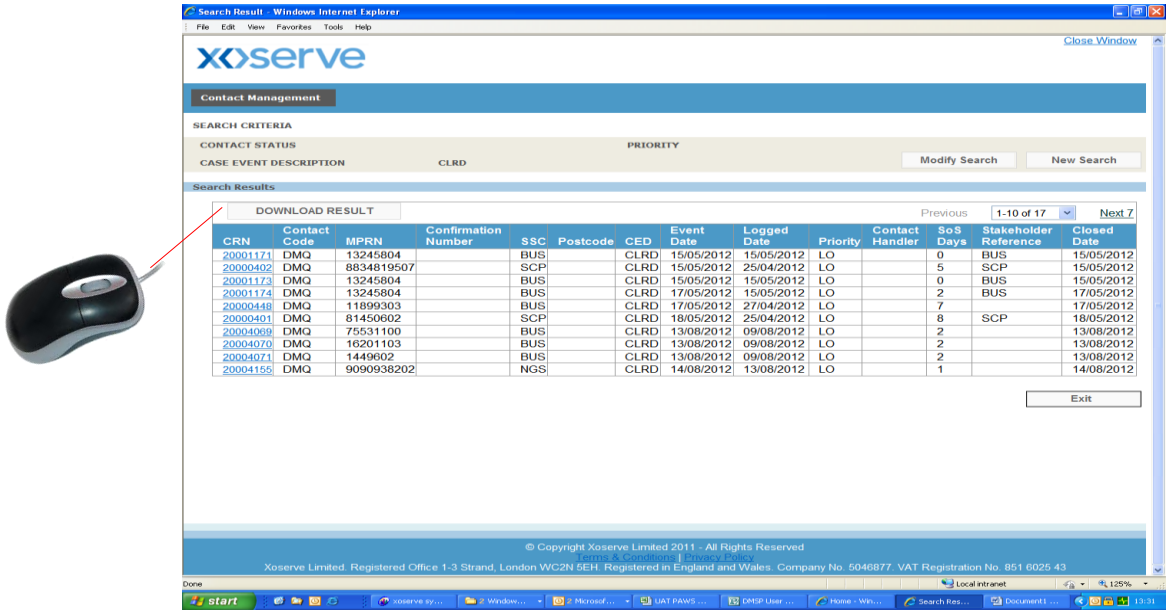
The result will be displayed as follows….



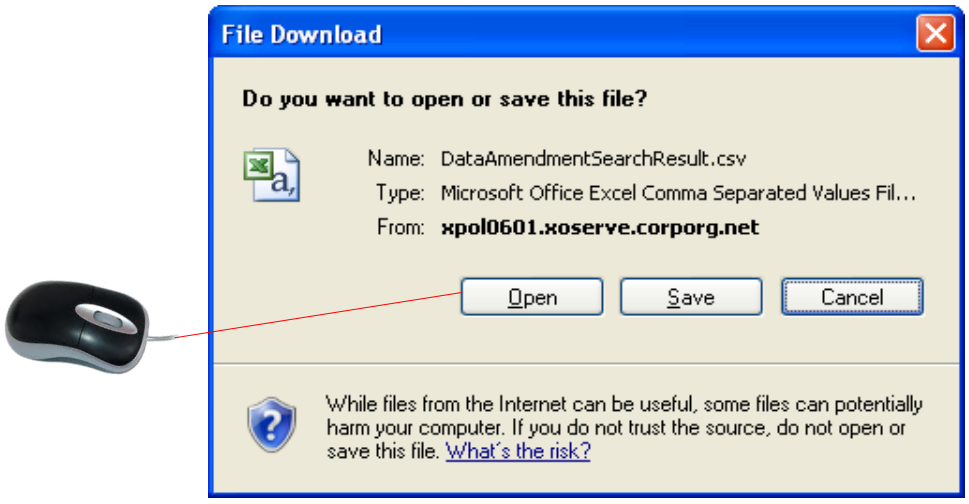
Select the CRN and the Data Clarification will appear.

5.5 Download results

The Download Results facility is available on Advanced Search and Data Clarification.



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.