



Contact Management User Guide iGT Edition

Version 2.0

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Introduction

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

The guide contains:-

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

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



Information



Warning



Area of interest



Mouse click required



Keyboard entry required



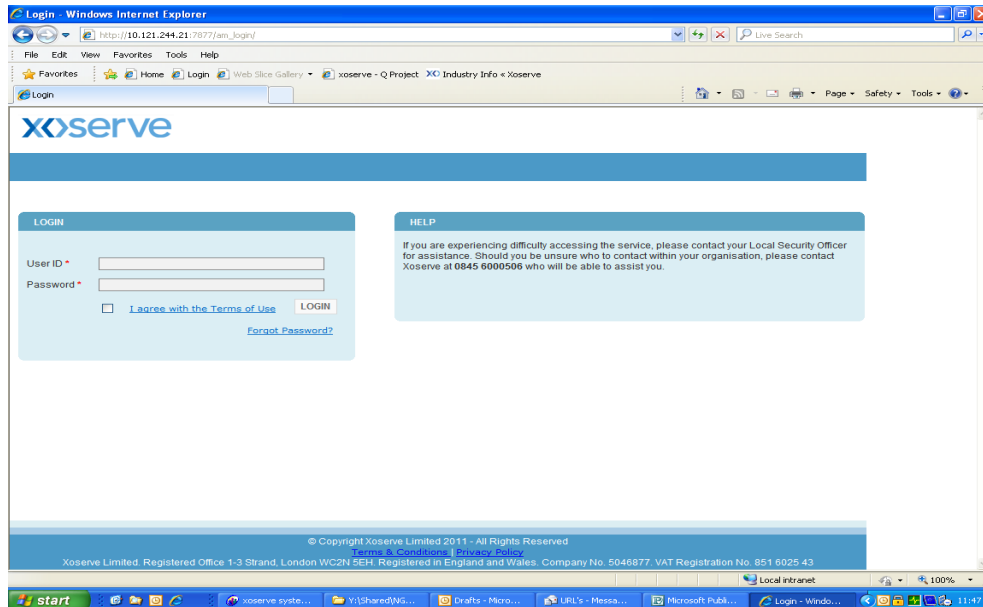
Section 2

Log onto Contact Management



2.1 Log onto the Contact Management system

The portal Login Page looks as follows....

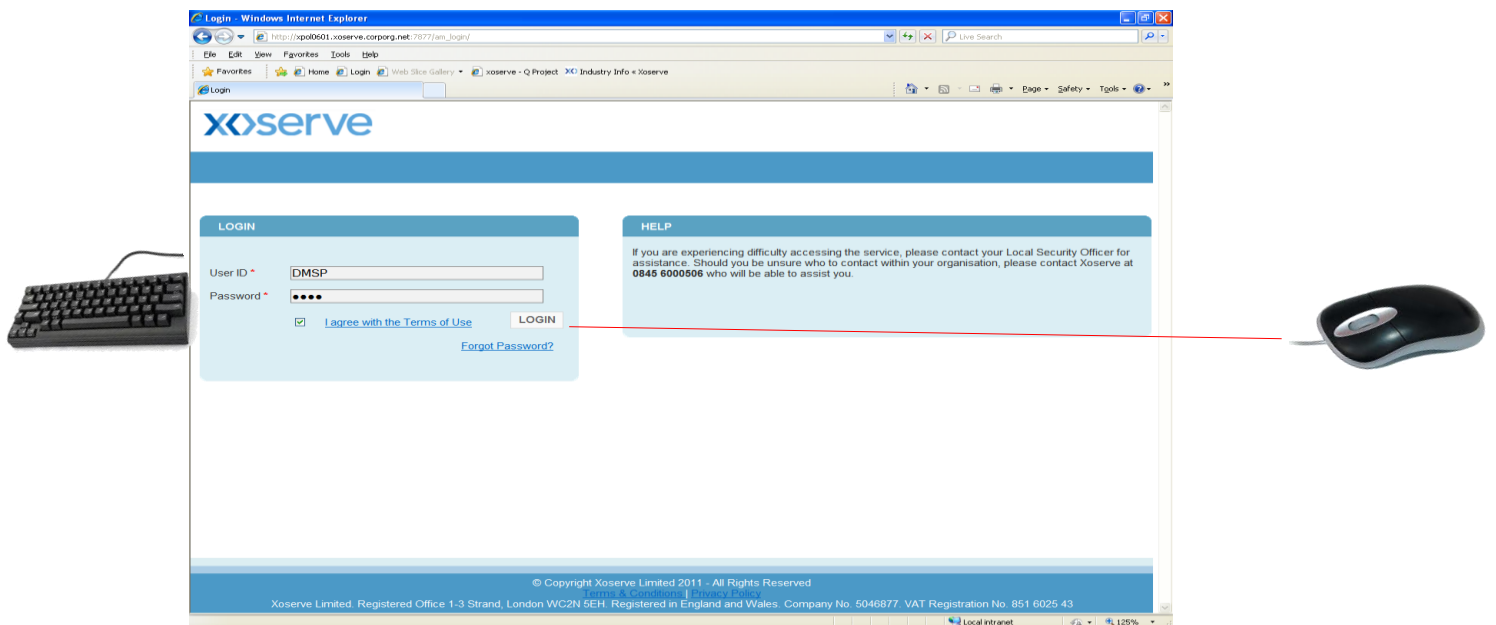


Step 1 – Enter your User ID

Step 2 – Enter your Password

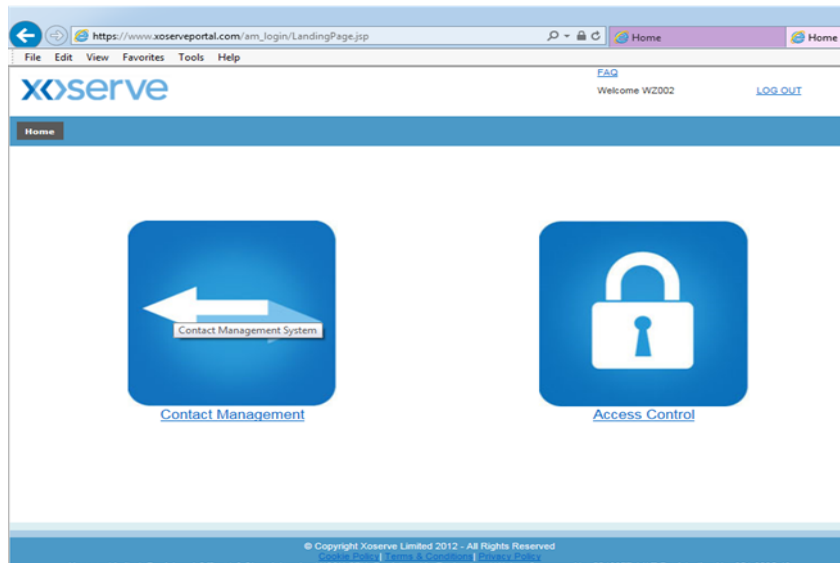
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



2.2 Contact Management Service Page

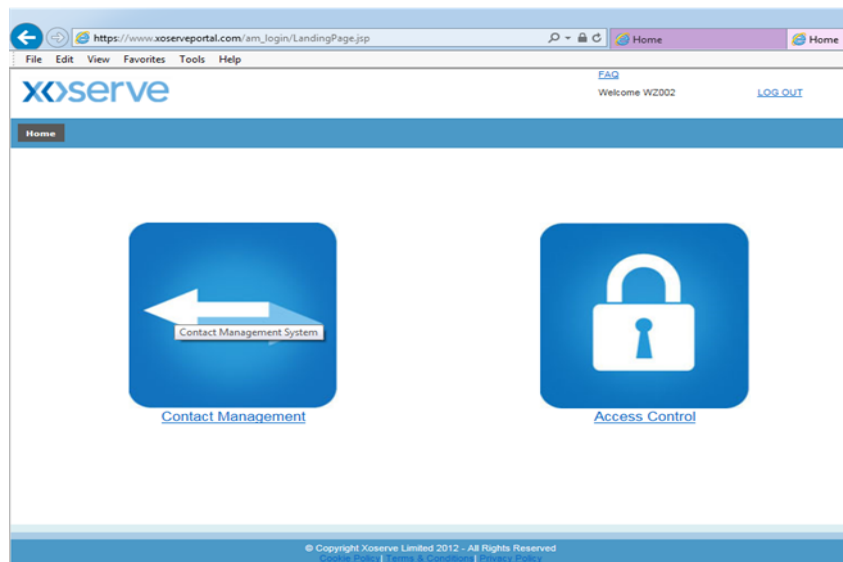
The following Service Page will appear....



There are two services on this page:-

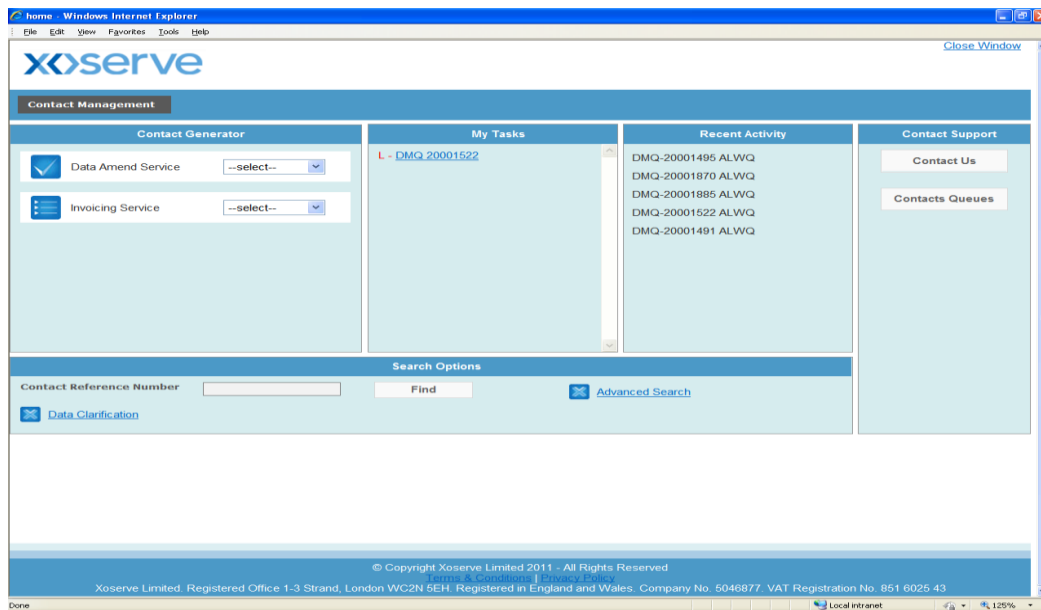
- ⇒ Contact Management
- ⇒ Access Controls

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



Click Xoserve logo and you are taken to Xoserve.com

2.3 Contact Management Home Page



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

Zone 1

Contact Generator – This section is not applicable to you.

Zone 2

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

Zone 3

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

Zone 4

Contact Support – This area is made up of 'Contact Us' and 'Contact Queues'. Contact Us details useful contact details for some of the services that Xoserve provide. Contacts Queues takes you to an area that lists outstanding Contacts for your organisation that require investigation.

Zone 5

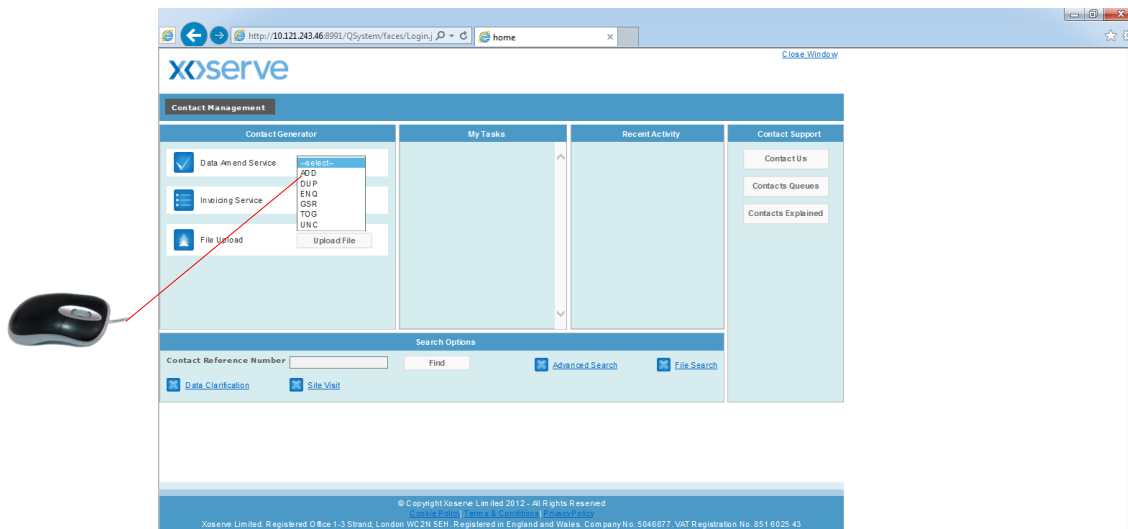
Search Options – This section includes a variety of search facilities. Contact Reference Number Search and Advanced Search will find Contacts raised in The Contact Management system. Data Clarification search returns Contacts that are currently at DC stage of the process.

Section 3

Log a Contact

3.1 Log a Contact via Screen

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



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



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

A screenshot of the Xoserve 'ADD' form for creating a new contact. The browser address bar shows 'http://10.121.243.46:8991/QSystem/Faces/Login.jspx'. The page title is 'Xoserve'. The main content area is divided into several sections: 'Contact Management' (with a 'Log ADD' sub-section), 'Status: New', and 'My Queues Task'. The form includes fields for 'TYPE: ADD', 'ORIGINATOR: BRITISH02 GA', 'SSC*: BUS', 'EMAIL ADDRESS: BGas02@xoserve.com', and 'TELEPHONE NO:'. Below these, there are two columns of fields: 'CURRENT ADDRESS' and 'PROPOSED ADDRESS'. Each column has fields for 'Building Number/Name', 'Delivery Point Alias', 'Sub Building Name', 'Principal Street Name', 'Dependent Street', 'Dependent Locality', 'Post Town', and 'Postcode'. A 'Swapped Address' checkbox is also present. At the bottom, there are 'Submit' and 'Cancel' buttons. 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 displays the Xoserve Contact Management web application in a Windows Internet Explorer browser window. The page title is 'ADD - Windows Internet Explorer'. The application header shows the 'xoserve' logo and a 'Close Window' button. The main content area is titled 'Contact Management' and includes a 'Log ADD' link. The form contains the following fields and values:

- TYPE: ADD
- ORIGINATOR: BRITISH02 GA
- SSC*: BUS
- EMAIL ADDRESS: BGas02@xoserve.com
- TELEPHONE NO:
- Meter Point Reference Number: 1113475601
- Confirmation Number: 186866537
- Type of Site: Domestic (selected), Industrial
- Type of Service: Single (selected), Multi
- CURRENT ADDRESS:
 - Building Number/Name: 1
 - 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: 2
 - Delivery Point Alias
 - Sub Building Name
 - Principal Street Name: Homer Road
 - Dependent Street
 - Dependent Locality
 - Post Town: Solihull
 - Postcode: B91 3LT
- Swapped Address: (checkbox)

A modal dialog box titled 'Contact Logged Successfully' is centered on the screen, displaying the following information:

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

The dialog box has a 'Close' button. The main form has 'Submit' and 'Cancel' buttons at the bottom. The footer of the page contains copyright information for Xoserve Limited 2011 and VAT registration details.



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.

The screenshot shows a Microsoft Excel spreadsheet titled 'Q EFT Template - V1.0 Xoserve - BUS'. The spreadsheet has columns A through N. Column A is labeled 'V1.0 Xoserve'. Column B is labeled 'OMP [M] [T3]'. Column C is labeled 'Stakeholder ID [M] [N10]'. Column D is labeled 'Originator Code [M] [T3]'. Column E is labeled 'Stakeholder Personnel's Name [M] [T60]'. Column F is labeled 'Stakeholder Reference Identifier [O] [T30]'. Column G is labeled 'User ID [M] [T20]'. Column H is labeled 'Contact Code [M] [T3]'. Column I is labeled 'Top 50 flag [O] [T1]'. Column J is labeled 'Domestic vs Industrial Indicator [CM] [T1]'. Column K is labeled 'Contact Explanation [CM] [T2000]'. Column L is labeled 'Confirmation Number [CM] [N9]'. Column M is labeled 'Meter Point Reference Number [CM] [N10]'. Column N is labeled 'Meter Point AQ [CM] [N12]'. The row 3 is highlighted in red, and the cell H3 contains the text 'ADD'. The cells B3, C3, D3, E3, F3, G3, and H3 are also highlighted in red. The cells B4 through B20, C4 through C20, D4 through D20, E4 through E20, F4 through F20, G4 through G20, and H4 through H20 are also highlighted in red.

	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 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]
3	Check	OMP	434	BUS	Mr Smith		JS125	ADD						
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														

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

The screenshot shows the Xoserve Contact Management web application interface. The page has a blue header with the Xoserve logo. Below the header, there are four main sections: Contact Generator, My Tasks, Recent Activity, and Contact Support. The Contact Generator section contains three items: Data Amend Service, Invoicing Service, and File Upload. The File Upload item has an 'Upload File' button. The My Tasks and Recent Activity sections are empty. The Contact Support section contains three items: Contact Us, Contacts Queues, and Contacts Explained. Below these sections, there is a Search Options section with a 'Contact Reference Number' input field, a 'Find' button, and links for 'Advanced Search' and 'File Search'. At the bottom of the page, there is a footer with copyright information and contact details.

home - Windows Internet Explorer

File Edit View Favorites Tools Help

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 Site Visit

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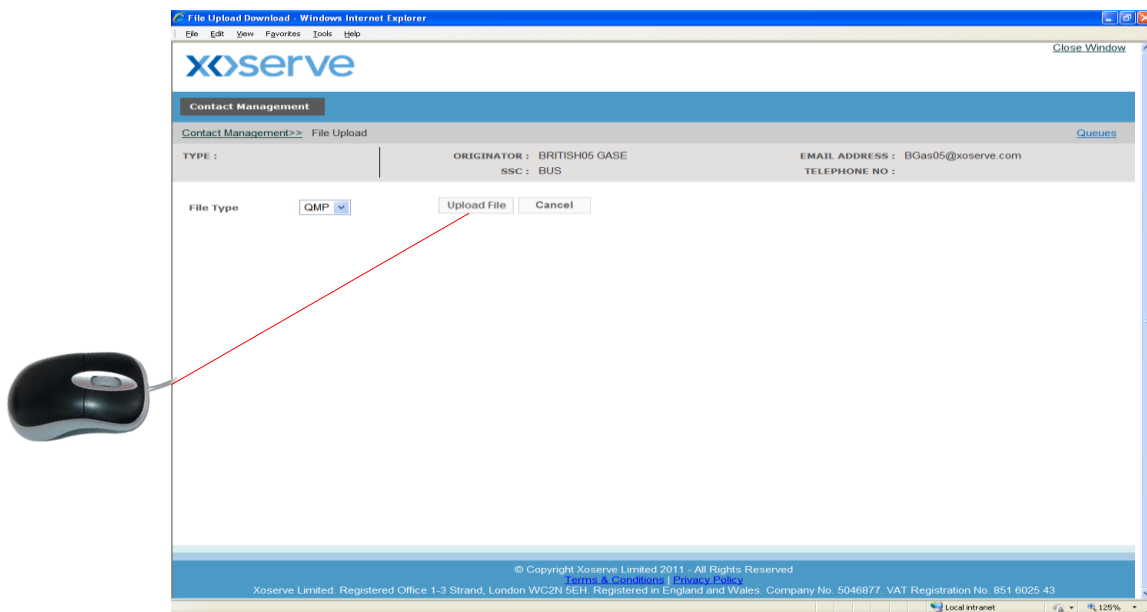
Done Local intranet 125%

3.2 File Upload

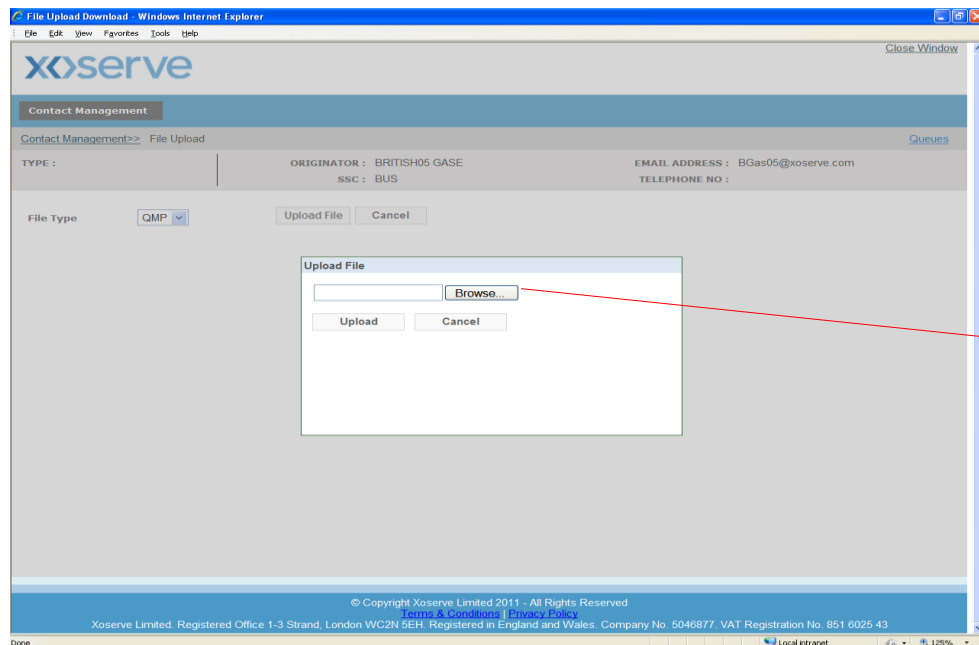
The following screen will appear.



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

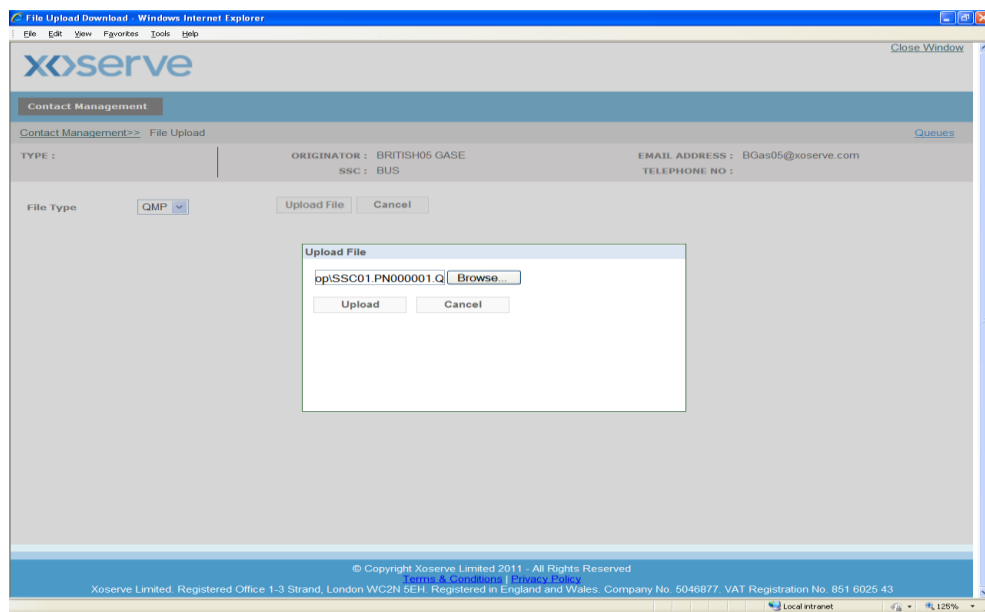


Select File Upload and the File Upload screen will appear....



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.

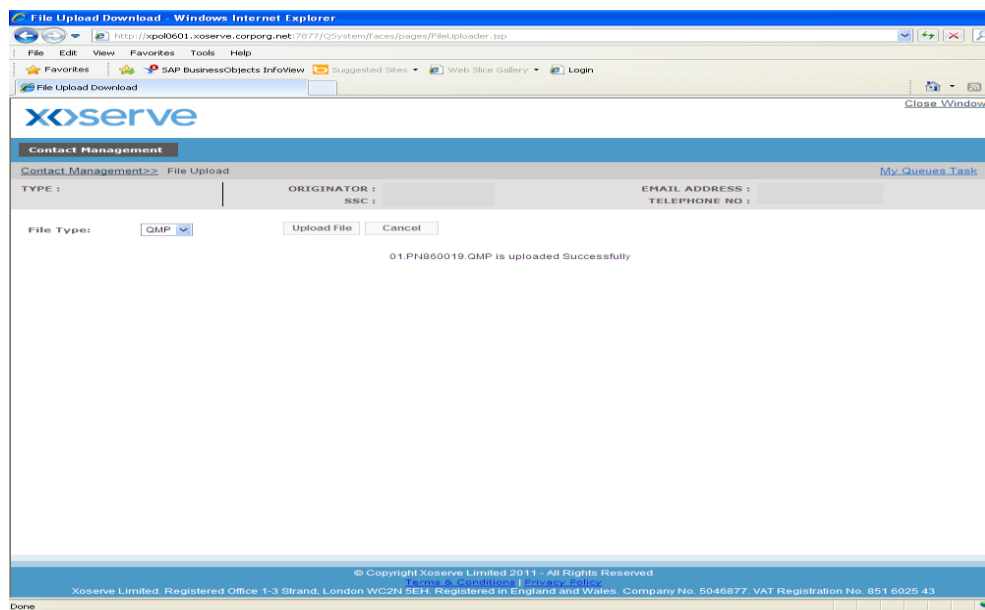
3.2 File Upload



Select Upload, and the file is submitted.

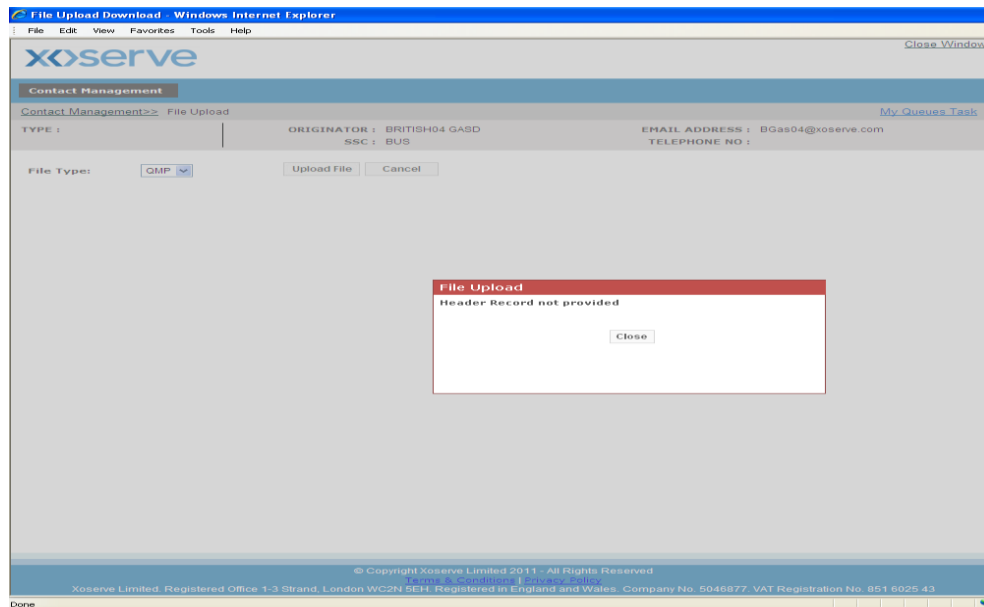
You will receive a message at this point stating whether the submission has successfully loaded or rejected.

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

File Edit View Favorites Tools Help

Close Window

xoserve

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

Type of Site * ☒ Domestic ☐ Industrial

Confirmation Number * 186866537

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

File Edit View Favorites Tools Help

Close Window

xoserve

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

Meter Point Reference Number to Retain * 9178595705

Type of Site * ☒ Domestic ☐ Industrial

Confirmation Number * 162890443

Meter Point Reference Number to Remove * 9153205706

End User Contract * ☐ Yes ☒ No

Contact Explanation

Contact Logged Successfully

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

Close

your contact)

Top 50 ☒

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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....

SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	20004433-SY1	NT	29/08/2012 14:33:13	12/09/2012 14:37:52	Not Allocated

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

My Tasks

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

Contacts Queue

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

Action Queue

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



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

4.2 Assigning a Contact - User

Actions Queue

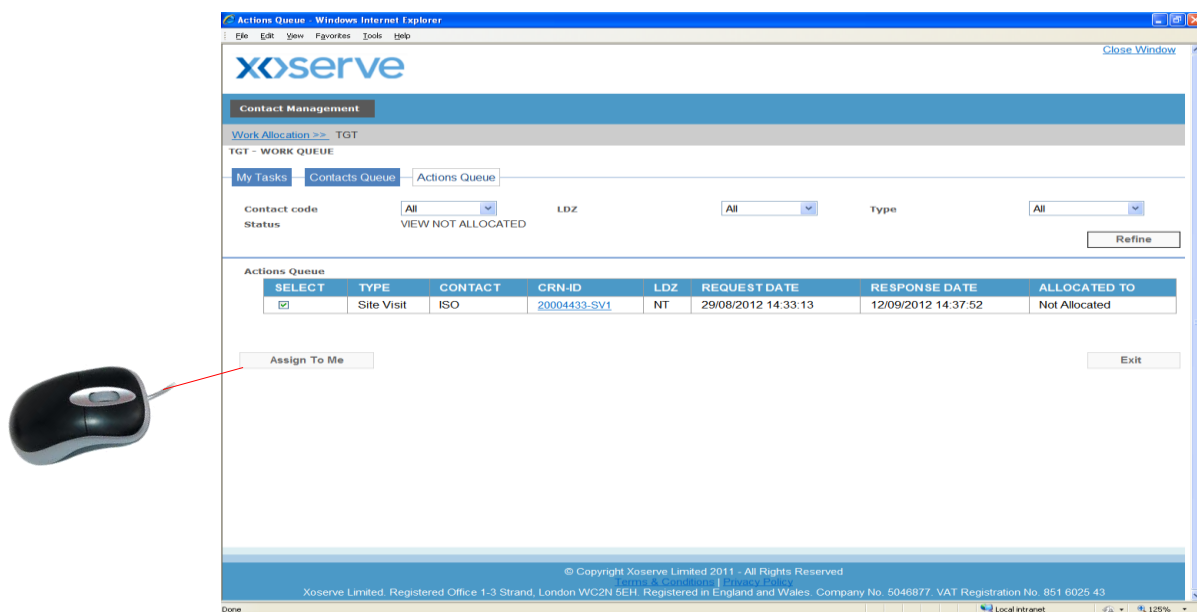
The Contacts Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue may be as a result of a Contact raised by a Shipper, e.g. Data Clarification or Site Visit.

Assign a Contact

Step 1 – Find the Contact in the queue

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

Step 3 – Click Assign To Me.



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 screenshot displays the 'Users Work Queue' interface within a Windows Internet Explorer browser window. The page title is 'Users Work Queue'. The main content area features the Xoserve logo and a 'Contact Management' section. Under 'Work Allocation >> CRG', there is a 'CRG - WORK QUEUE' section. This section contains three tabs: 'Contacts Queue', 'Actions Queue', and 'User Work Queue'. The 'User Work Queue' tab is currently selected. Below the tabs, there are filter options: 'SSC' with a dropdown menu set to 'All', 'Role' with a dropdown menu set to 'ALL', and a 'User ID' input field. A 'Refine' button is located to the right of these filters. Below the filters is a table with the following columns: 'USER ID', 'FIRST NAME', 'LAST NAME', 'EMAIL', 'ORG', 'ROLE', and 'PHONE'. The table currently displays 'No data available'. An 'Exit' button is positioned at the bottom right of the table area. The footer of the page includes 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 User Work Queue.

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

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

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



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

4.5 Assigning a Contact - Supervisor

Actions Queue

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

Assigning a Contact

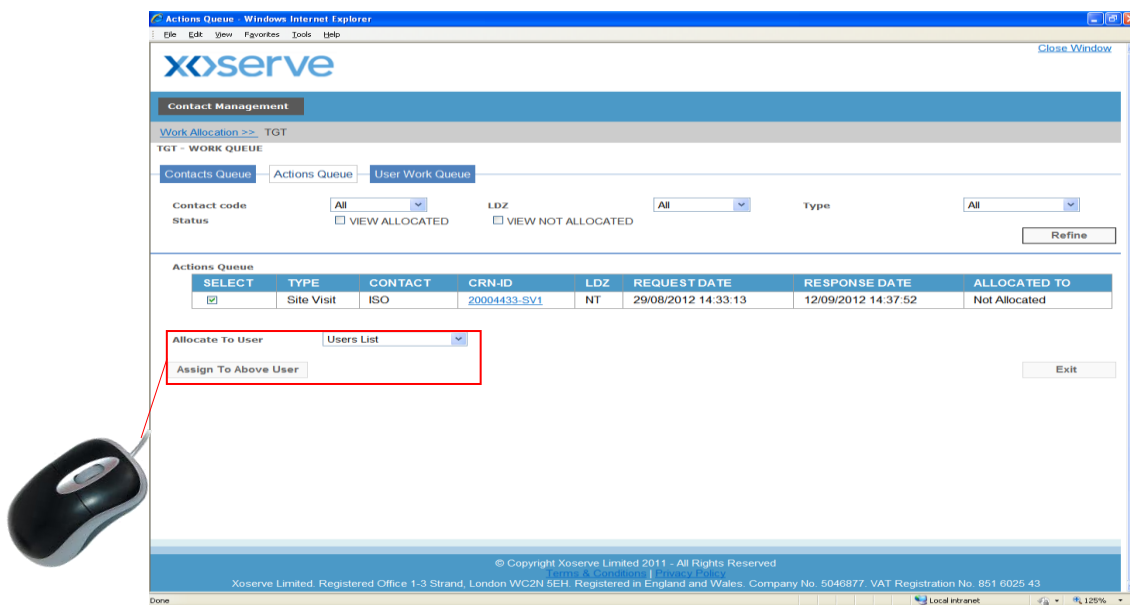
Step 1 – Find the Contact in the queue

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

Step 3 – Assign to a User by clicking 'Allocate to User'.

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

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



The 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

User Work Queue - Windows Internet Explorer

File Edit View Favorites Tools Help

Close Window

xserve

Contact Management

Work Allocation >> TGT

TGT05 - WORK QUEUE

UserId	Organization	TGT05	First Name	TGT05	Last Name	TGTE		
		TGT	Role	Not Available				
<input checked="" type="checkbox"/>	Site Visit	ISO	20004433	TCG	29/08/2012 14:37:52		29/08/2012 14:33:13	TGT05

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

Original Contact and Third Party Data Clarification Request

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

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



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

The screenshot shows the 'Actions Queue' window in Internet Explorer. The page has a blue header with the 'xserve' logo. Below the header, there are tabs for 'My Tasks', 'Contacts Queue', and 'Actions Queue'. The 'Actions Queue' tab is selected. Below the tabs, there are search filters for 'Contact code', 'Status', 'LDZ', 'Type', and 'All'. The 'Status' filter is set to 'VIEW NOT ALLOCATED'. Below the filters is a table with the following data:

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

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

Step 1 – Select the box for the relevant Contact

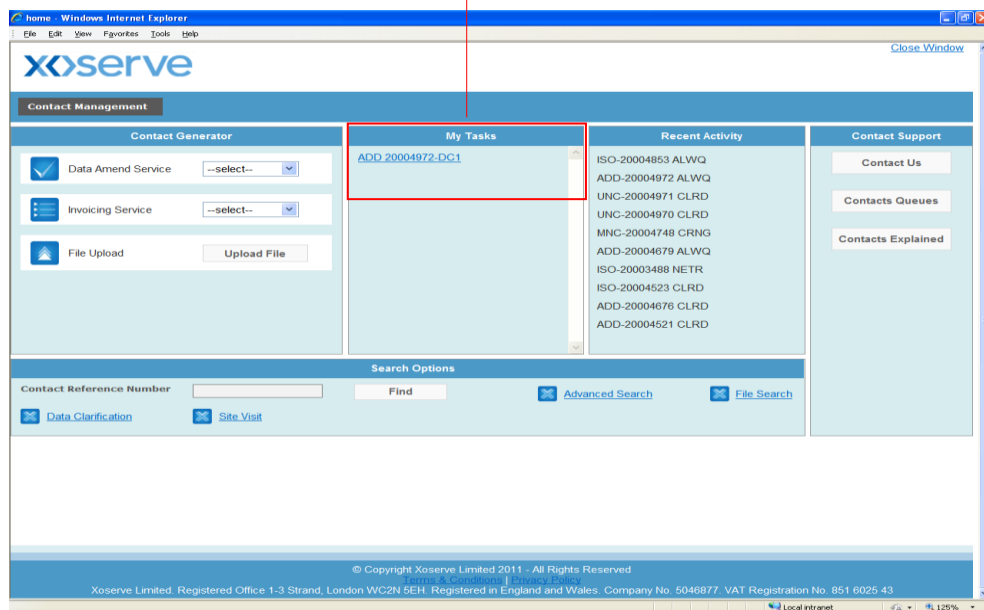
Step 2 – Click Assign to me



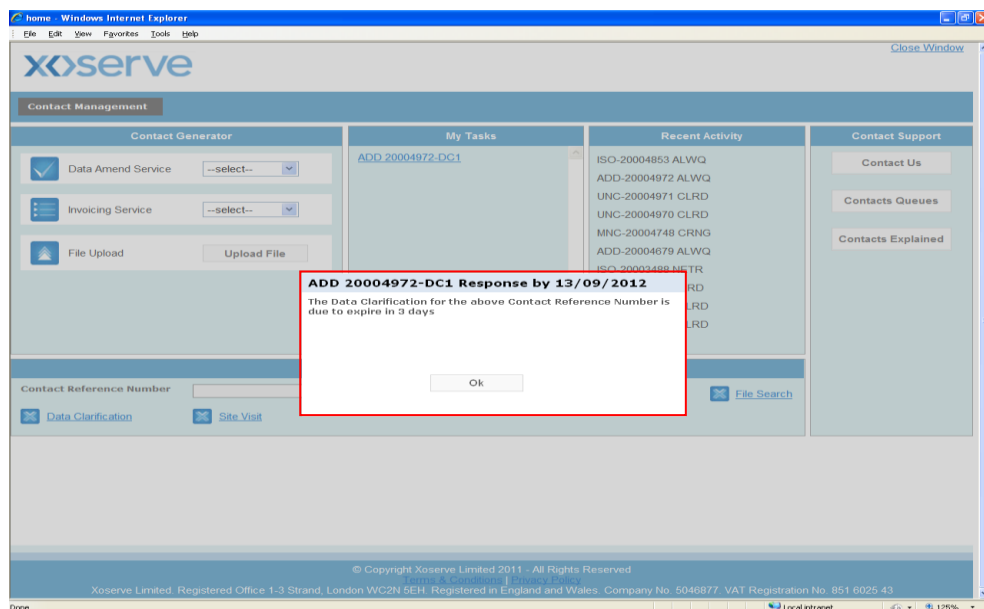
This screenshot is identical to the one above, but with a red arrow pointing from a computer mouse to the 'Assign To Me' button. The table data remains the same.

5.1 Receiving a Data Clarification Request

The Contact will become visible in your My Tasks.

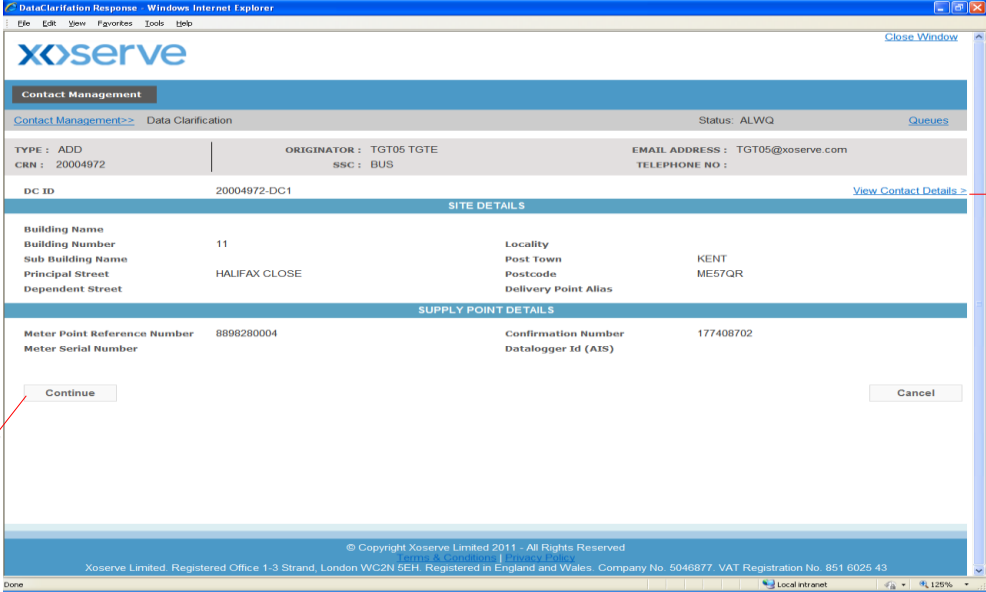


When the DC is selected the message below will appear stating the DC number and when a response is due by.



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

5.1 Receiving a Data Clarification Request



The screenshot shows the 'Data Clarification Response' window in Internet Explorer. The window title is 'Data Clarification Response - Windows Internet Explorer'. The Xoserve logo is at the top. Below it, the 'Contact Management' tab is active. The 'Data Clarification' section shows the following details:

- TYPE : ADD
- CRN : 20004972
- ORIGINATOR : TGT05 TGTE
- SSC : BUS
- EMAIL ADDRESS : TGT05@xoserve.com
- TELEPHONE NO :
- DC ID : 20004972-DC1

The 'SITE DETAILS' section includes:

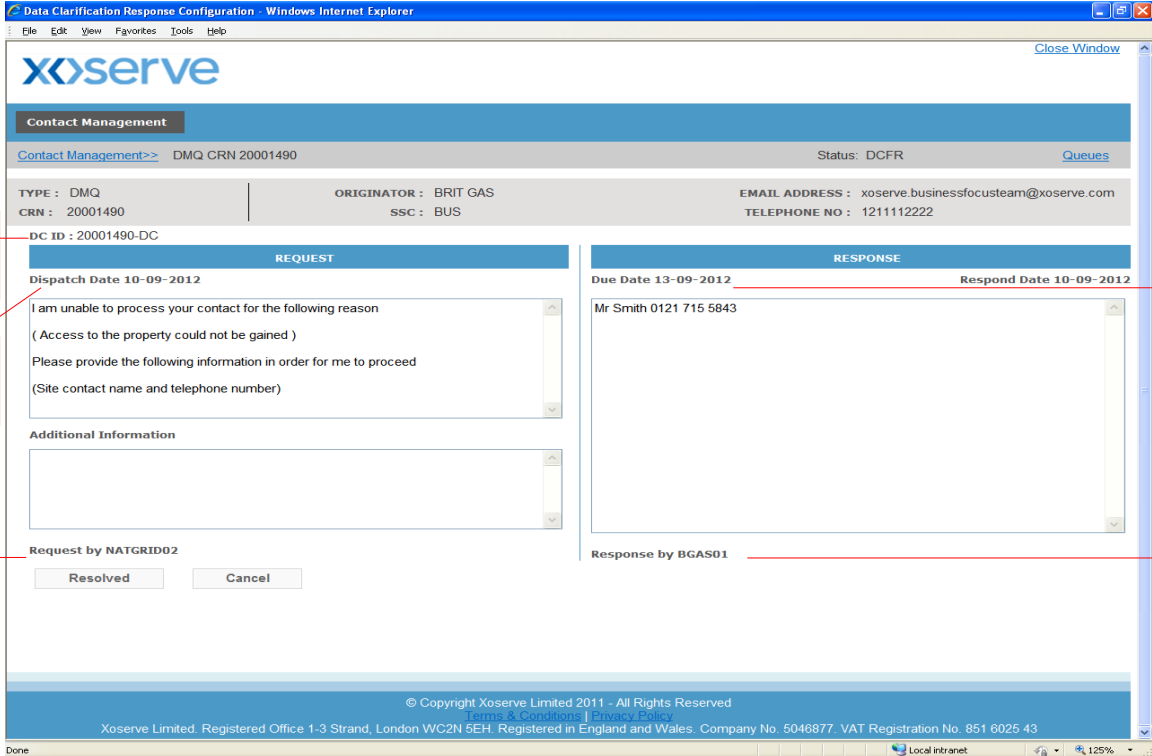
- Building Name
- Building Number : 11
- Sub Building Name
- Principal Street : HALIFAX CLOSE
- Dependent Street
- Locality
- Post Town : KENT
- Postcode : ME57QR
- Delivery Point Alias

The 'SUPPLY POINT DETAILS' section includes:

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

At the bottom, there are 'Continue' and 'Cancel' buttons. A mouse cursor is pointing at the 'Continue' button. A red box on the right contains the text: 'You can see the original Contact by clicking on this hyperlink.' pointing to the 'View Contact Details >' link.

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



The screenshot shows the 'Data Clarification Response Configuration' window in Internet Explorer. The window title is 'Data Clarification Response Configuration - Windows Internet Explorer'. The Xoserve logo is at the top. Below it, the 'Contact Management' tab is active. The 'DMQ CRN 20001490' section shows the following details:

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

The 'REQUEST' section includes:

- Dispatch Date 10-09-2012
- I am unable to process your contact for the following reason (Access to the property could not be gained)
- Please provide the following information in order for me to proceed (Site contact name and telephone number)
- Additional Information
- Request by NATGRID02

The 'RESPONSE' section includes:

- Due Date 13-09-2012
- Respond Date 10-09-2012
- Mr Smith 0121 715 5843
- Response by BGAS01


At the bottom, there are 'Resolved' and 'Cancel' buttons. A red box on the left contains the text: 'DC ID is an identifier for the original Contact.' pointing to the 'DC ID : 20001490-DC' field. Another red box on the left contains the text: 'Dispatch Date is the day the DC was sent.' pointing to the 'Dispatch Date 10-09-2012' field. A third red box on the left contains the text: 'Request by' will identify the Contact Handler. pointing to the 'Request by NATGRID02' field. A red box on the right contains the text: 'This is when the DC needs to be responded by.' pointing to the 'Respond Date 10-09-2012' field.

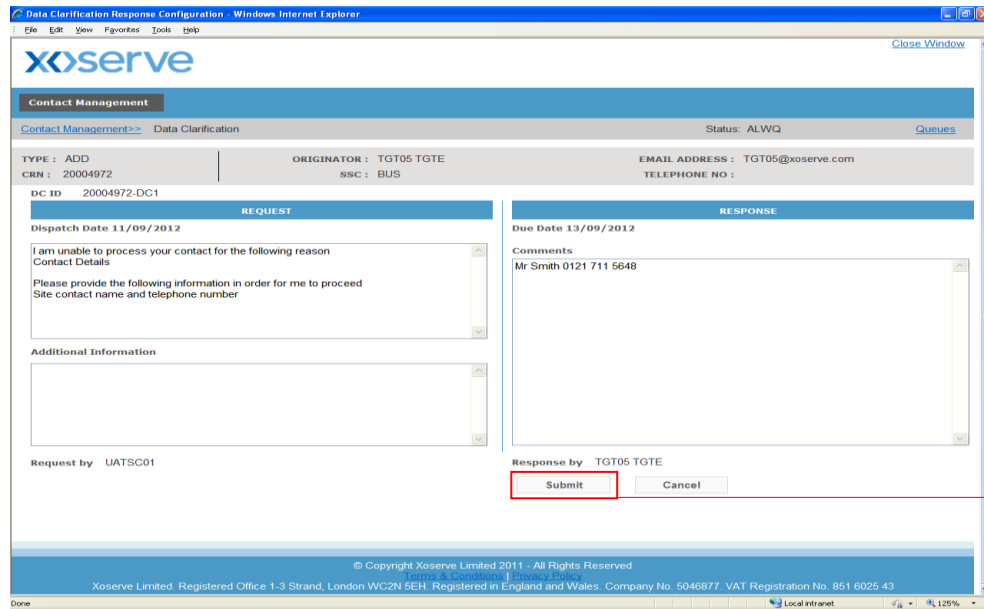


Up to two DC's can be sent per Contact. These will show as DC1 and DC2 on the system.

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.



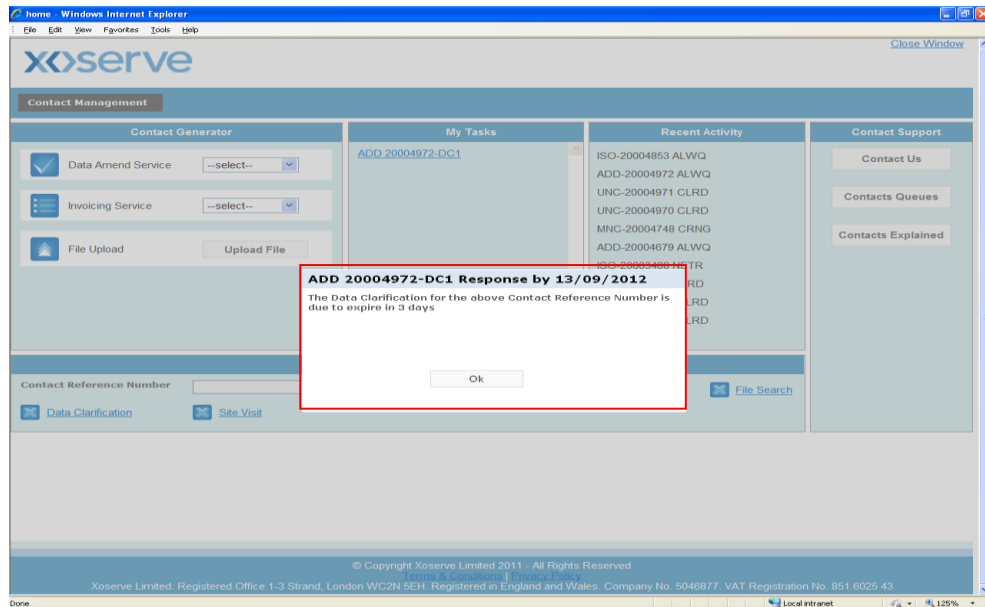
The DC will be directed back to the Contact Handler at Xoserve.

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

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

5.3 Auto closure of a Data Clarification Request

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



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



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

E.g. DC1 responded after 15 days since it was sent

DC2 sent on day 16 therefore 4 business days will remain

5.4 Receiving a Site Visit Request

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



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

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

Step 1 – Select the box for the relevant Contact

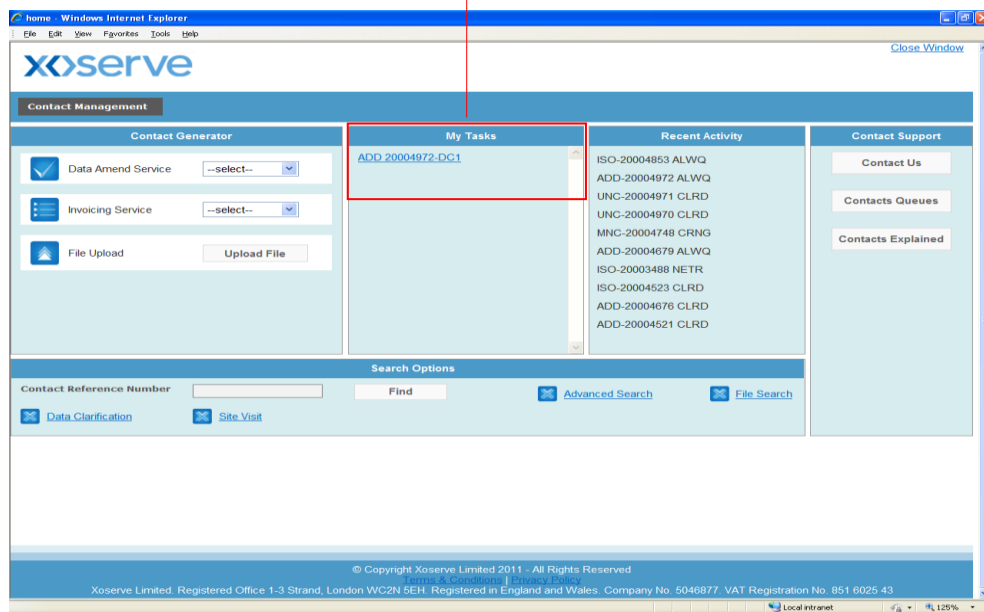
Step 2 – Click Assign to me



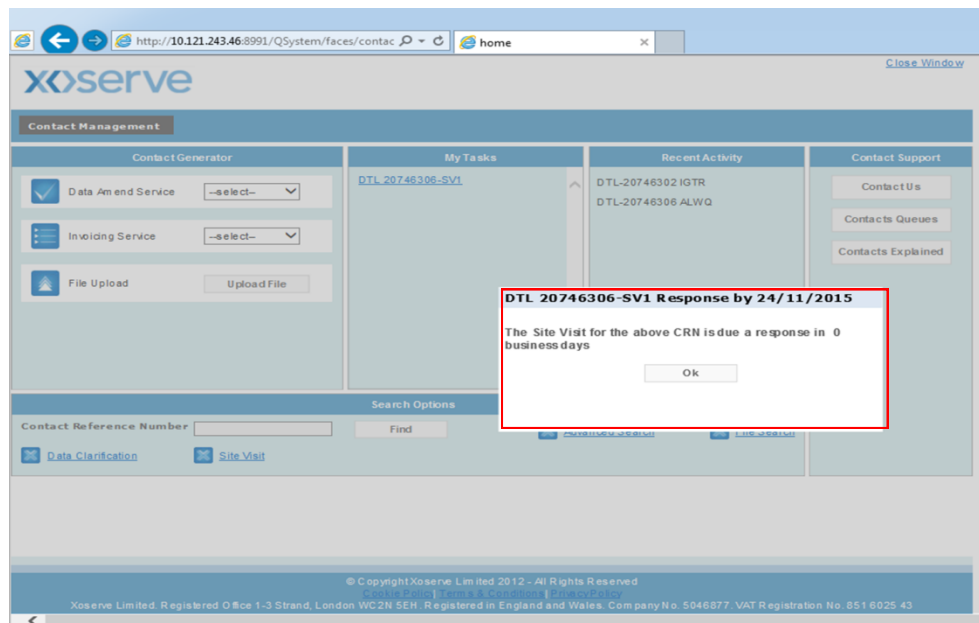
SELECT	TYPE	CONTACT	CRN-ID	LDZ	REQUEST DATE	RESPONSE DATE	ALLOCATED TO
<input type="checkbox"/>	Site Visit	ISO	20000865-SV2	WM	10/05/2012 15:21:29	20/09/2012 17:46:47	Not Allocated
<input checked="" type="checkbox"/>	Site Visit	ISO	20004853-SV1	EA	10/09/2012 10:46:05	17/09/2012 10:51:59	Not Allocated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

5.4 Receiving a Site Visit Request

The Contact will become visible in your My Tasks.

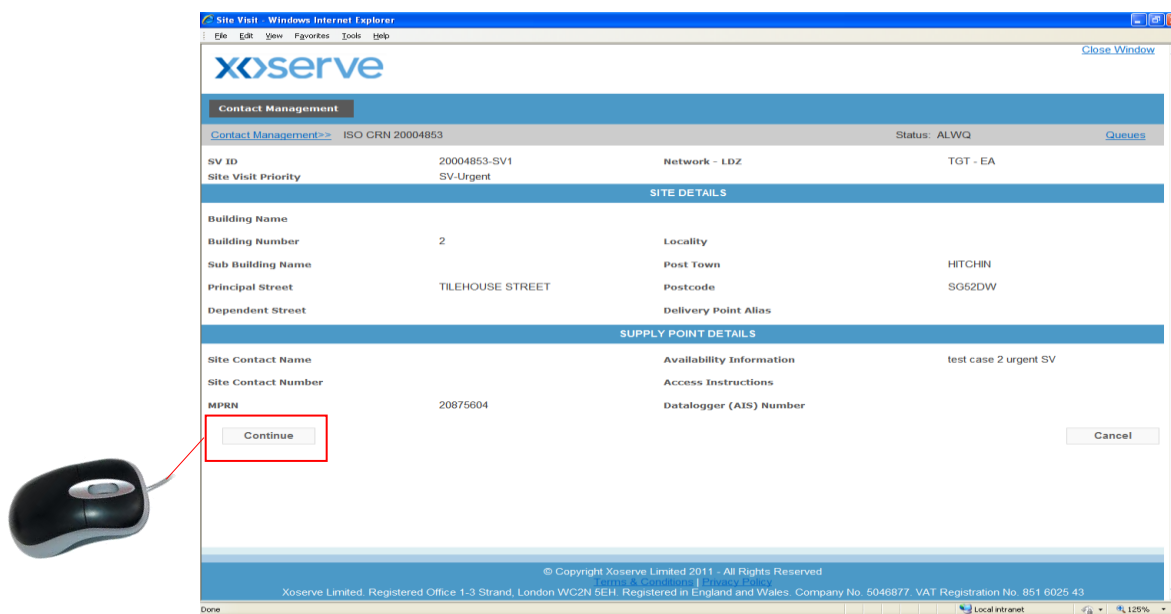


When the SV is selected the message below will appear stating the SV number.



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

5.4 Receiving a Site Visit Request

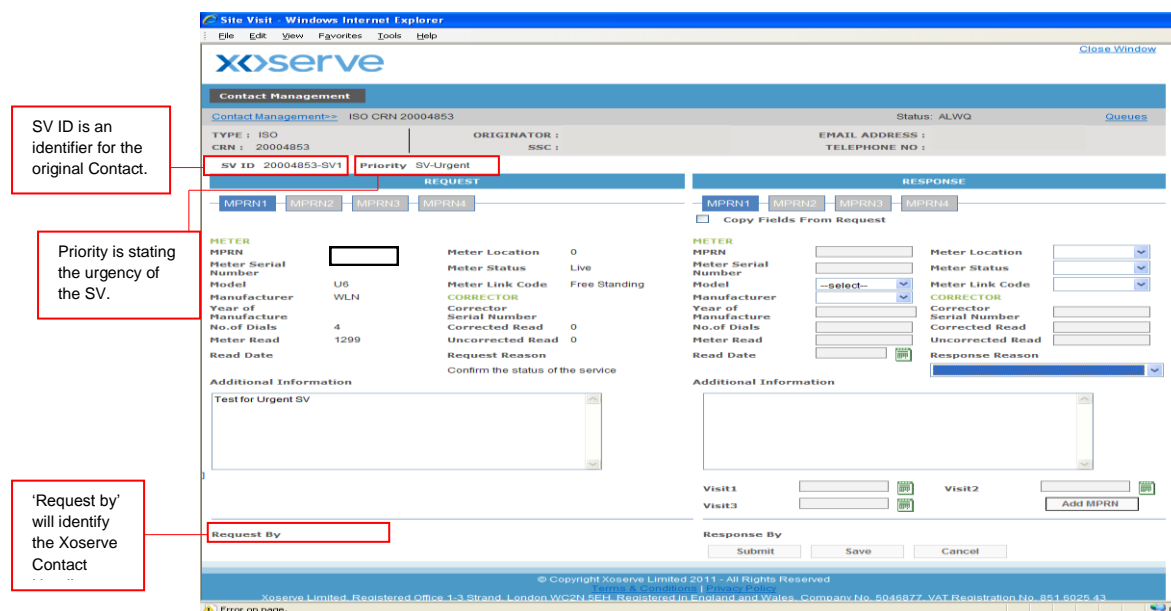


The screenshot shows the 'Site Visit' form in a Windows Internet Explorer browser window. The form is titled 'Contact Management' and displays details for ISO CRN 20004853. The status is 'ALWQ' and the queues are 'SV-Urgent'. The form is divided into sections: 'SITE DETAILS' and 'SUPPLY POINT DETAILS'. The 'Continue' button is highlighted with a red box, and a mouse cursor is pointing at it.

CONTACT MANAGEMENT			
Contact Management >> ISO CRN 20004853		Status: ALWQ	
SV ID	20004853-SV1	Network - LDZ	TGT - EA
Site Visit Priority	SV-Urgent		
SITE DETAILS			
Building Name			
Building Number	2	Locality	
Sub Building Name		Post Town	HITCHIN
Principal Street	TILEHOUSE STREET	Postcode	SG52DW
Dependent Street		Delivery Point Alias	
SUPPLY POINT DETAILS			
Site Contact Name	Availability Information		test case 2 urgent SV
Site Contact Number	Access Instructions		
MPRN	20875604	Datalogger (AIS) Number	
Continue			Cancel

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

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



The screenshot shows the 'Site Visit' form in a Windows Internet Explorer browser window. The form is titled 'Contact Management' and displays details for ISO CRN 20004853. The status is 'ALWQ' and the queues are 'SV-Urgent'. The form is divided into sections: 'REQUEST' and 'RESPONSE'. The 'SV ID' field is highlighted with a red box and labeled 'SV ID is an identifier for the original Contact.' The 'Priority' field is highlighted with a red box and labeled 'Priority is stating the urgency of the SV.' The 'Request By' field is highlighted with a red box and labeled 'Request by will identify the Xoserve Contact'.

CONTACT MANAGEMENT			
Contact Management >> ISO CRN 20004853		Status: ALWQ	
TYPE : ISO	ORIGINATOR :	EMAIL ADDRESS :	
CRN : 20004853	SSC :	TELEPHONE NO :	
SV ID : 20004853-SV1	Priority : SV-Urgent		
REQUEST		RESPONSE	
<p>METER</p> <p>MPRN</p> <p>Meter Serial Number</p> <p>Model</p> <p>Manufacturer</p> <p>Year of Manufacture</p> <p>No. of Dials</p> <p>Meter Read</p> <p>Read Date</p> <p>Additional Information</p> <p>Test for Urgent SV</p>		<p>METER</p> <p>MPRN</p> <p>Meter Serial Number</p> <p>Model</p> <p>Manufacturer</p> <p>Year of Manufacture</p> <p>No. of Dials</p> <p>Meter Read</p> <p>Read Date</p> <p>Additional Information</p> <p>Visit1</p> <p>Visit2</p> <p>Visit3</p> <p>Response By</p> <p>Submit</p> <p>Save</p> <p>Cancel</p>	



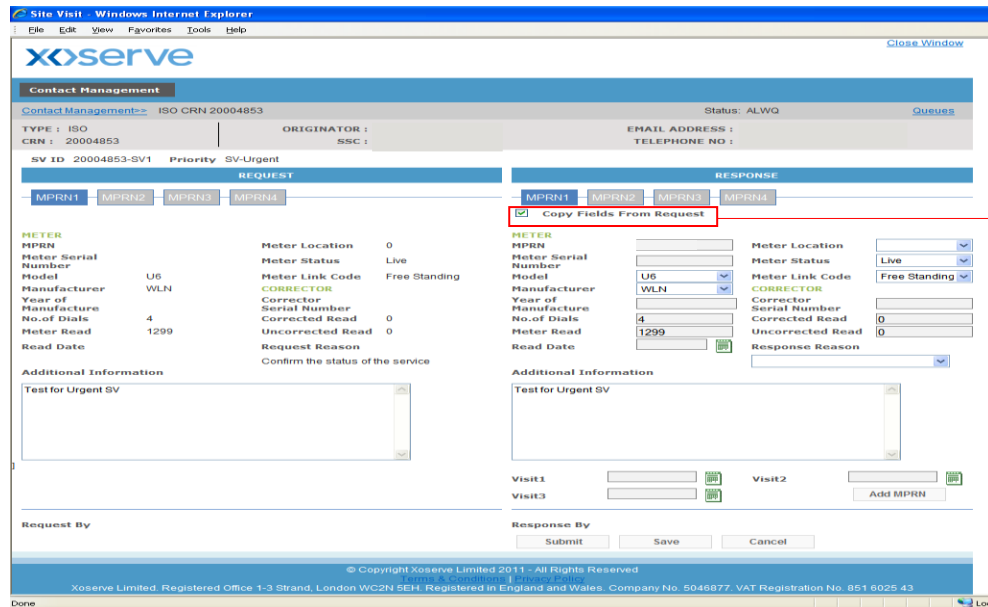
There is no limit to the number of SV's that can be sent per Contact.



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

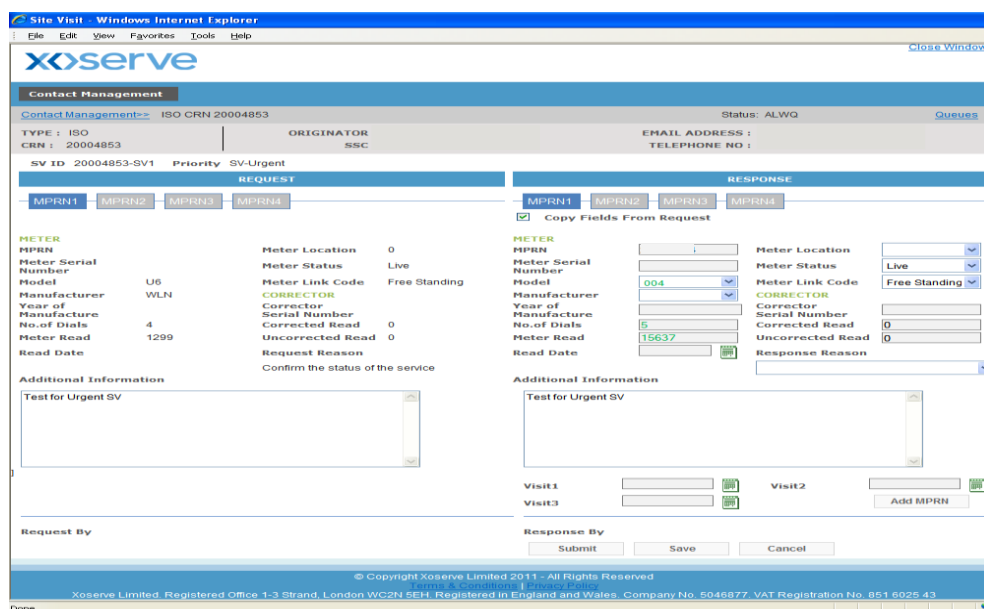
5.5 Responding to a Site Visit Request

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



The screenshot shows the Xoserve 'Site Visit' response screen in a Windows Internet Explorer browser. The 'Contact Management' section at the top displays details for ISO CRN 20004853, with status 'ALWQ'. Below this, the 'REQUEST' section is active, showing fields for METER (MPRN, Serial Number, Model, Manufacturer, Year of Manufacture, No. of Dials, Meter Read, Read Date) and CORRECTOR (Link Code, Free Standing, Corrected Read, Uncorrected Read, Request Reason). The 'RESPONSE' section is also visible, with a checkbox labeled 'Copy Fields From Request' highlighted by a red box and a mouse cursor. The 'Additional Information' section contains a text area for 'Test for Urgent SV'. At the bottom, there are fields for 'Request By' and 'Response By' with 'Submit', 'Save', and 'Cancel' buttons.

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



This screenshot shows the same Xoserve 'Site Visit' response screen, but with the 'Copy Fields From Request' checkbox unchecked. The 'RESPONSE' section now contains manually entered data, which is highlighted in green to indicate changes. The 'METER' fields show: MPRN (blank), Serial Number (blank), Model (U6), Manufacturer (WLN), Year of Manufacture (4), No. of Dials (1299), Meter Read (15637), and Read Date (blank). The 'CORRECTOR' fields show: Link Code (blank), Free Standing (blank), Corrected Read (0), Uncorrected Read (0), and Request Reason (blank). The 'Additional Information' section contains a text area for 'Test for Urgent SV'. The 'Request By' and 'Response By' fields and buttons remain at the bottom.

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

5.5 Responding to a Site Visit Request



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

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

The screenshot shows the Xoserve website interface in a Windows Internet Explorer browser. The page title is 'Site Visit - Windows Internet Explorer'. The browser's address bar shows 'http://www.xoserve.co.uk'. The page has a blue header with the Xoserve logo and a 'Close Window' link. Below the header is a 'Contact Management' section with a 'Contact Management' link and a 'Status: ALWO' indicator. The main content area is divided into two columns: 'REQUEST' and 'RESPONSE'. The 'REQUEST' column contains a table with fields for MPRN, Meter Serial Number, Meter Location, Meter Status, Meter Link Code, Meter Model, Manufacturer, Year of Manufacture, No. of Dials, Meter Read, and Read Date. The 'RESPONSE' column contains similar fields and a 'Copy Fields From Request' checkbox. Below these columns is an 'Additional Information' section with a text area for 'Test for Urgent SV'. At the bottom, there is a 'Response By' section with a 'Submit' button highlighted by a red box. A mouse cursor is pointing at the 'Submit' button. The footer contains copyright information for Xoserve Limited 2011.



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

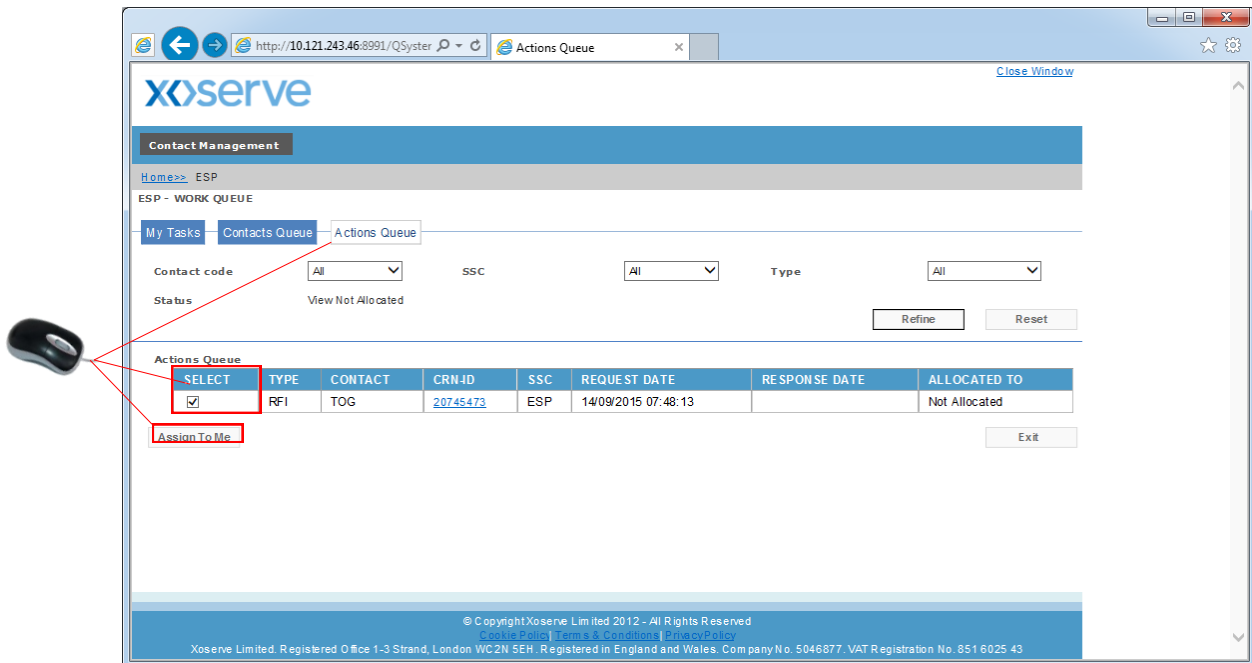


Your name is populated in the 'Response by' field.

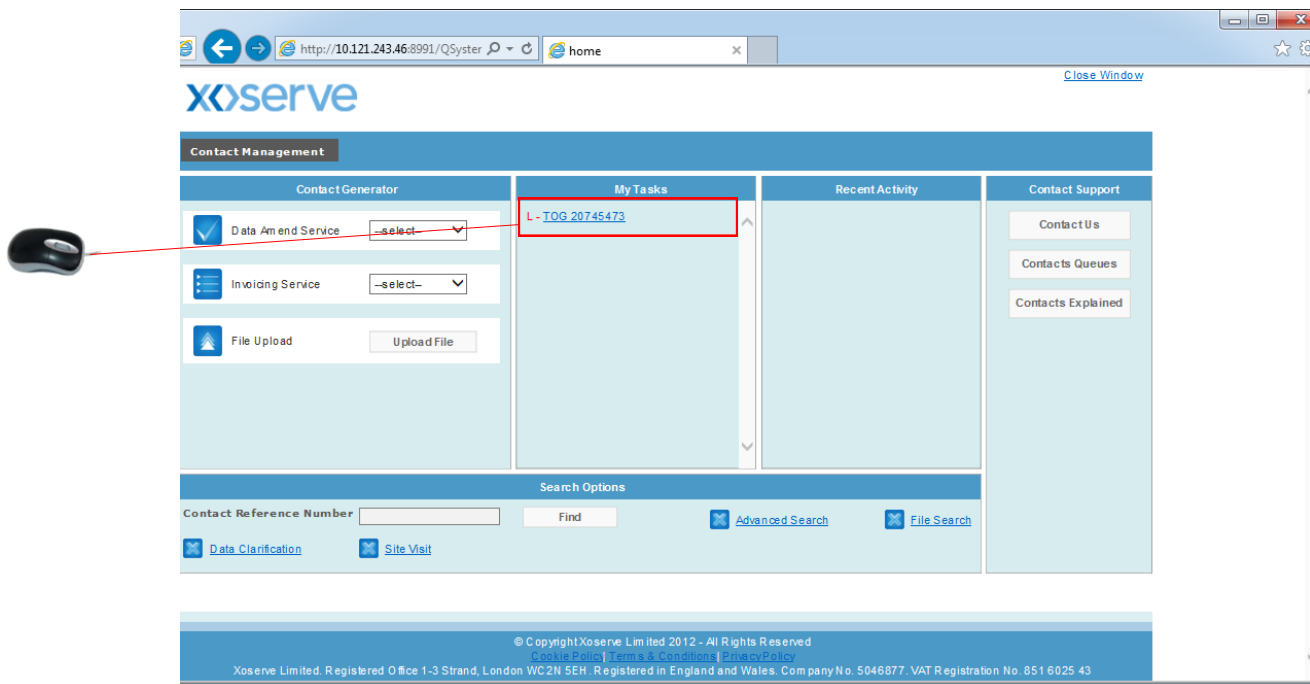
Once the relevant information is updated, click Submit. The SV will be directed back to the Contact Handler at Xoserve.

5.6 Receiving an RFI request (Theft of Gas only)

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



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



5.6 Receiving an RFI request (Theft of Gas only)

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

Contact Management

Home >> TOG CRN 20745473 Status: RFI Queues

TYPE : TOG ORIGINATOR : EMAIL ADDRESS :
CRN : 20745473 SSC : TELEPHONE NO :

[View Contact Details](#)

TOG Investigation Outcome * --Select--
Type of Theft * --Select--
Adjustment Start Date
Adjustment End Date
Total Volume
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? *
Have Police been informed? *
Police Officer's Name
Police Officer's Phone Number
Crime Reference Number
Police Station

Engineer's Report *
TOG TESTING:

Submit Cancel

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

Contact Details - Windows Internet Explorer

File Edit View Favorites Tools Help

Xoserve

Contact Management

Home >> TOG - RFI Status: RFI Queues

TYPE : TOG ORIGINATOR : EMAIL ADDRESS :
CRN : 2 SSC : TELEPHONE NO :

Contact Information TOG Investigation

Meter Point Reference Number
Meter Serial Number
Building Number/Name
Delivery Point Alias
Sub Building Name
Principal Street Name
Dependent Street
Dependent Locality
Post Town
Postcode

DFDSFSD
FDFSDF
FSDDSF
B90 2WW

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

adssads
Tampered Meter Index

Ok

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Done Local intranet 110%

5.7 Responding to an RFI request (Theft of Gas only)

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

Valid TOG

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

Type of Theft

Adjustment Start Date

Adjustment End Date

Total Volume

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

Engineers report

Valid TOG-Not Pursuing

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

Invalid TOG

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

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

TOG - Windows Internet Explorer

File Edit View Favorites Tools Help

xoserve

Close Window

Contact Management

Home >> TOG - RFI

TYPE : TOG CRN : 20170295

ORIGINATOR : SSC :

EMAIL ADDRESS : TELEPHONE NO :

Status: Queues

[View Contact Details](#)

TOG Investigation Outcome * --Select--

Type of Theft --Select--

TOG Start Date Invalid TOG

TOG End Date Valid TOG-Not Pursuing

Estimated Calculation of Gas [kWh] Valid TOG

Meter Model

Meter Make

Meter Reading

Year of Manufacture

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

Submit Cancel

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

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

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

The screenshot displays the Xoserve Contact Management interface within a Windows Internet Explorer browser window. The page title is "SearchViewForm - Windows Internet Explorer". The Xoserve logo is at the top left. The main header area shows "Contact Management" and "Home >> TOG CRN 20168939". The status is "CLRD" and there is a "Queues" link. The contact details are as follows:

TYPE :	ORIGINATOR :	EMAIL ADDRESS :
TOG	SSC :	TELEPHONE NO :
CRN : 20168939		

The "Contact Information" tab is selected, showing the following details:

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

The "TOG Investigation" tab is also visible. It contains the following fields:

- Required Emergency Job? ☐ Yes ☒ No
- Job Number
- Type of Theft (Allegation)
- TOG Allegation Description

The "Resolution Comments" section is highlighted with a red border and contains 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 the form, there are two buttons: "Ok" and "Challenge Resolution". The footer of the page contains the following text:

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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 web browser. The contact details for CRN 20003472 are displayed, including the originator's name, address, and contact information. The resolution status is 'CLRD'. The resolution comments section contains a message: 'With reference to your contact, I am pleased to inform you that your request has been actioned. Contact Resolved. With reference to your contact, I am pleased to inform you that your request has been actioned. Thank you for raising this contact and I hope it is resolved to your satisfaction.' A red box highlights the second line of the resolution message, and a red line points to a callout box on the right that says 'This part of the resolution message'.

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

The screenshot shows the Xoserve Contact Management interface in a web browser. The contact details for CRN 20004457 are displayed, including the originator's name, address, and contact information. The resolution status is 'CLRD'. The resolution comments section contains a message: 'With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. The site requested has had a Shipper history.' A red box highlights the second line of the resolution message, and a red line points to a callout box on the right that says 'This part tells you why your Contact'.

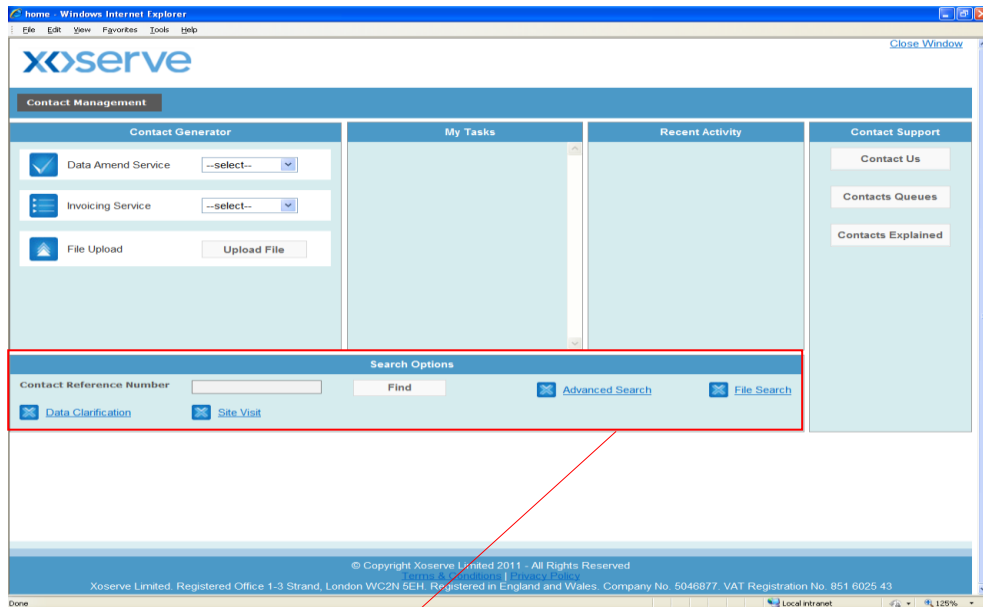
Section 7

Search Facilities

7.1 Search Options

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

Search options are located on the Contact Management home page.



There are 5 search options, these are:-

Basic Search – Pinpointing a Contact by Contact Reference Number

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

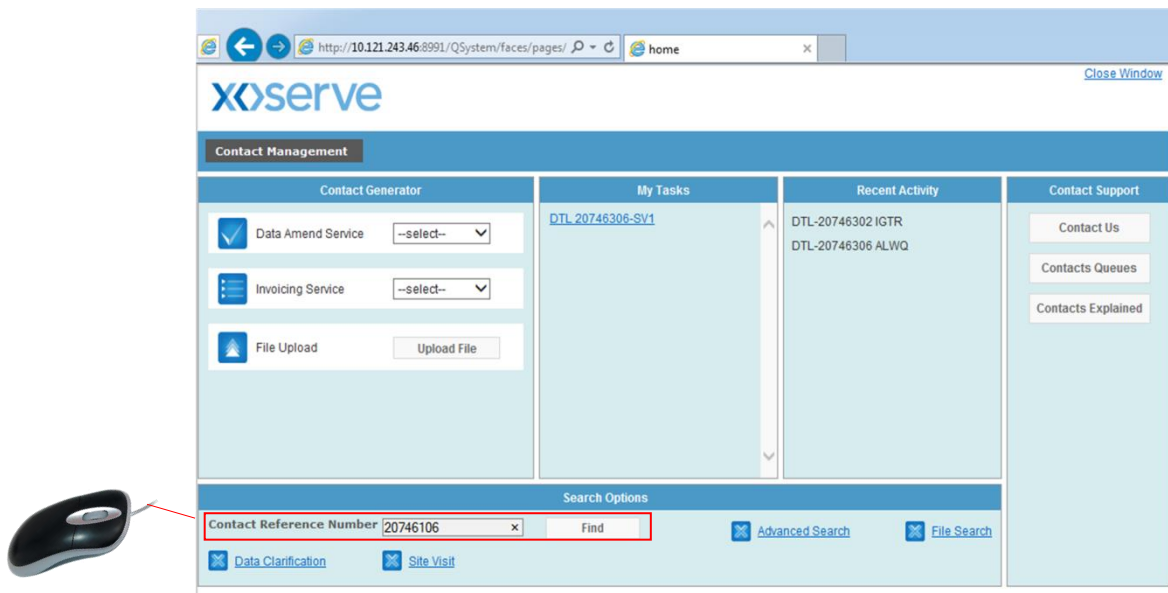
File Search – Locating a file submitted to Xoserve

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

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

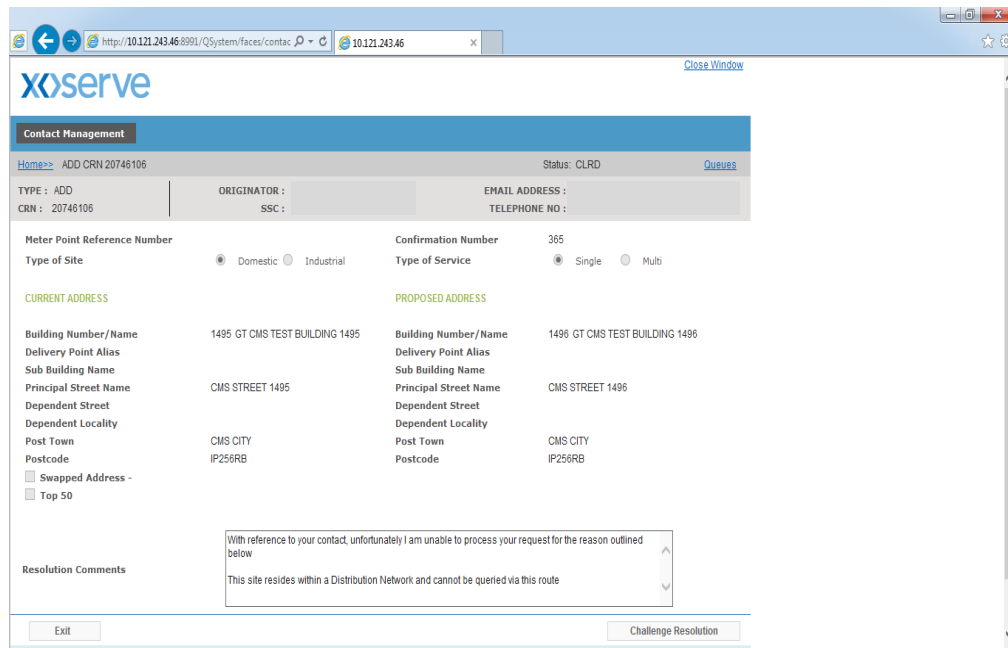
7.2 Basic Search

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



The screenshot shows the xserve Contact Management interface. The 'Search Options' section is highlighted, showing the 'Contact Reference Number' field with the value '20746106' and a 'Find' button. A mouse cursor is pointing at the 'Find' button. Other buttons visible include 'Advanced Search', 'File Search', 'Data Clarification', and 'Site Visit'.

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



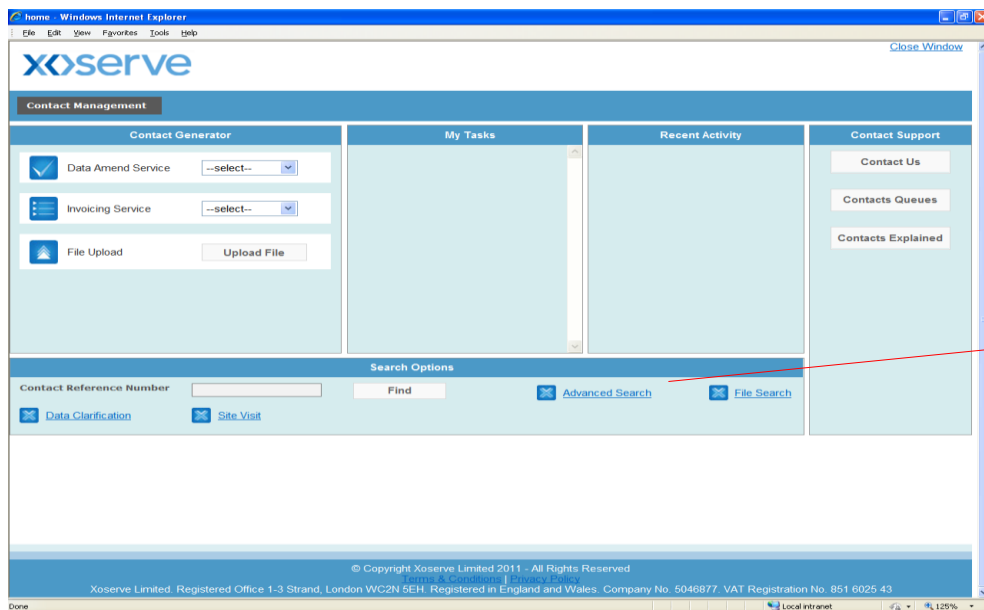
The screenshot shows the xserve Contact Management interface displaying the details of a contact. The contact is identified by CRN 20746106 and is in a 'CLRD' status. The details include 'Meter Point Reference Number', 'Type of Site', 'Confirmation Number', 'Type of Service', 'CURRENT ADDRESS', and 'PROPOSED ADDRESS'. The 'Resolution Comments' section contains a message: 'With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. This site resides within a Distribution Network and cannot be queried via this route'.



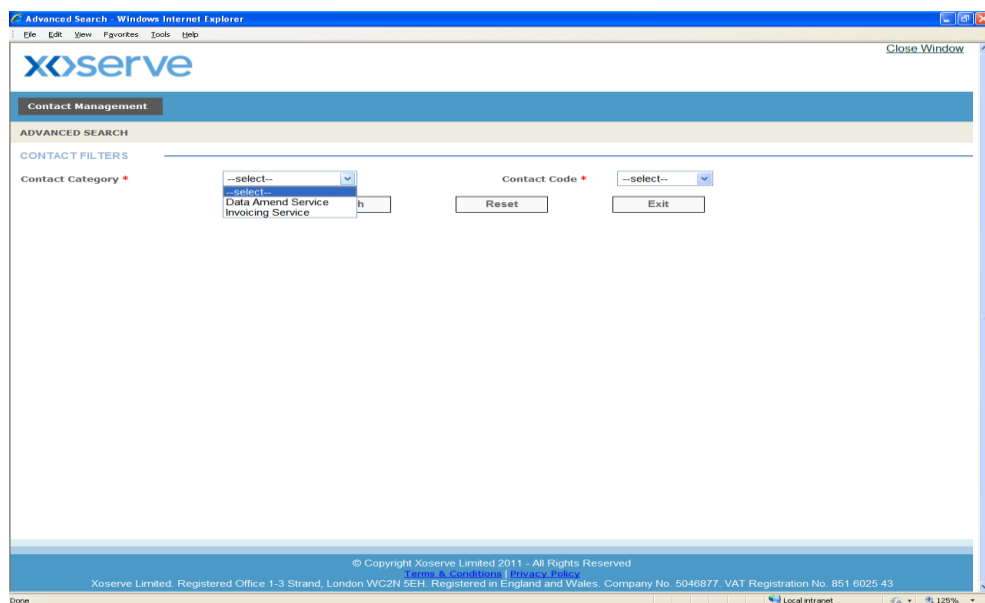
You can not edit this Contact; it is read only.

7.3 Advanced Search

To retrieve information on Contacts, click Advanced Search.

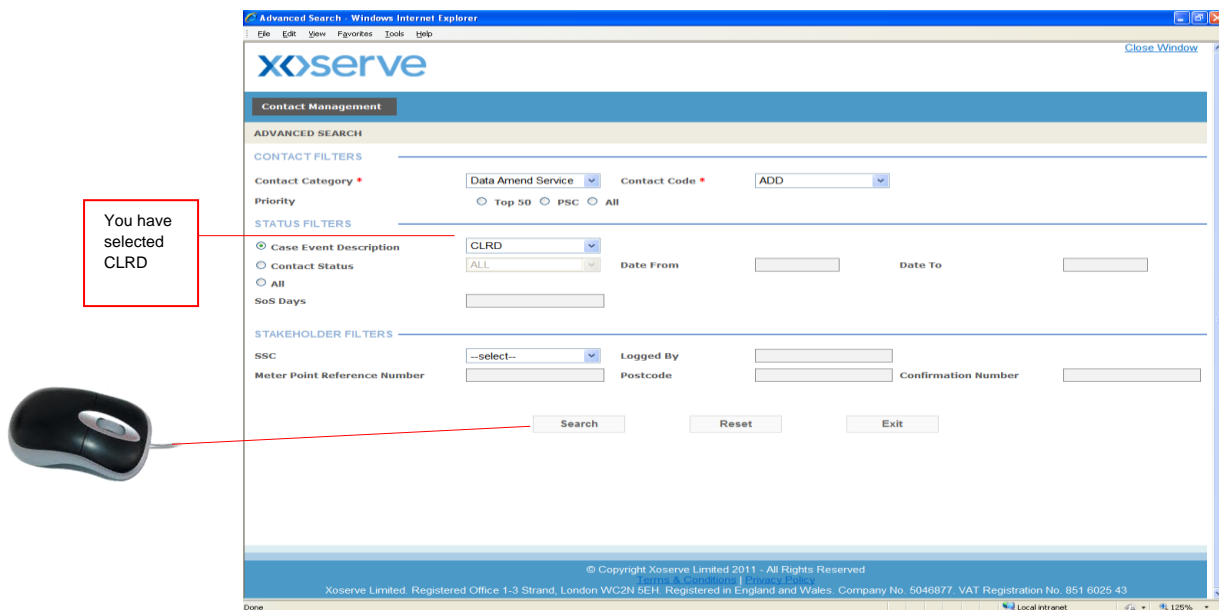


You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.



7.3 Advanced Search

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



Advanced Search - Windows Internet Explorer

xoserve

Contact Management

ADVANCED SEARCH

CONTACT FILTERS

Contact Category * Contact Code *

Priority ☐ Top 50 ☐ PSC ☐ All

STATUS FILTERS

☒ Case Event Description Date From Date To

☐ Contact Status

☐ All

SoS Days

STAKEHOLDER FILTERS

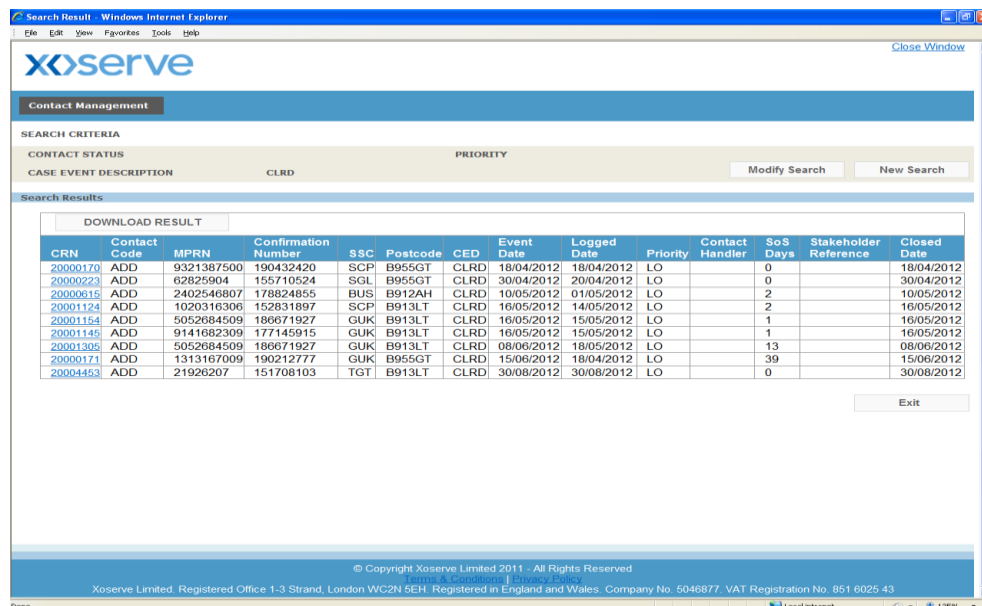
SSC Logged By

Meter Point Reference Number Postcode Confirmation Number

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Enter the necessary data, in the above example you have selected 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 ☐ CLRD ☐ PSC ☐ All

CASE EVENT DESCRIPTION

Search Results

DOWNLOAD RESULT

CRN	Contact Code	MPRN	Confirmation Number	SSC	Postcode	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date
20000170	ADD	9321387500	190432420	SCP	B955GT	CLRD	18/04/2012	18/04/2012	LO	0	0	0	18/04/2012
20000223	ADD	62825904	155710524	SGL	B955GT	CLRD	30/04/2012	20/04/2012	LO	0	0	0	30/04/2012
20000215	ADD	2402546807	178824855	BUS	B912AH	CLRD	10/05/2012	01/05/2012	LO	2	2	2	10/05/2012
20001124	ADD	1020316306	152831897	SCP	B913LT	CLRD	16/05/2012	14/05/2012	LO	2	2	2	16/05/2012
20001154	ADD	5052684509	186671927	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO	1	1	1	16/05/2012
20001145	ADD	9141682309	177145915	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO	1	1	1	16/05/2012
20001305	ADD	5052684509	186671927	GUK	B913LT	CLRD	08/06/2012	18/05/2012	LO	13	13	13	08/06/2012
20000171	ADD	1313167909	190212777	GUK	B955GT	CLRD	15/06/2012	18/04/2012	LO	39	39	39	15/06/2012
20004453	ADD	21926207	151708103	TGT	B913LT	CLRD	30/08/2012	30/08/2012	LO	0	0	0	30/08/2012

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

7.3 Advanced Search

Modify Search

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

Search Result - Windows Internet Explorer

Close Window

xoserve

Contact Management

SEARCH CRITERIA

CONTACT STATUS: CLRD PRIORITY

CASE EVENT DESCRIPTION: CLRD

Modify Search New Search

Search Results

DOWNLOAD RESULT

CRN	Contact Code	MPRN	Confirmation Number	SSC	Postcode	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date
20000170	ADD	9321387500	190432420	SCP	B955GT	CLRD	18/04/2012	18/04/2012	LO		0		18/04/2012
20000223	ADD	62825904	155710524	SGL	B955GT	CLRD	30/04/2012	20/04/2012	LO		0		30/04/2012
20000615	ADD	2402546807	178824855	BUS	B912AH	CLRD	10/05/2012	01/05/2012	LO		2		10/05/2012
20001124	ADD	1020316306	152831897	SCP	B913LT	CLRD	16/05/2012	14/05/2012	LO		2		16/05/2012
20001154	ADD	5052684509	186671927	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO		1		16/05/2012
20001145	ADD	9141682309	177145915	GUK	B913LT	CLRD	16/05/2012	15/05/2012	LO		1		16/05/2012
20001305	ADD	5052684509	186671927	GUK	B913LT	CLRD	08/06/2012	18/05/2012	LO		13		08/06/2012
20000171	ADD	1313167009	190212777	GUK	B955GT	CLRD	15/06/2012	18/04/2012	LO		39		15/06/2012
20004453	ADD	21926207	151708103	TGT	B913LT	CLRD	30/08/2012	30/08/2012	LO		0		30/08/2012

Exit

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

Advanced Search - Windows Internet Explorer

Close Window

xoserve

Contact Management

ADVANCED SEARCH

CONTACT FILTERS

Contact Category * Data Amend Service Contact Code * ADD

Priority
☐ Top 50 ☐ PSC ☐ All

STATUS FILTERS

☒ Case Event Description CLRD
☐ Contact Status ALL
☐ All

SoS Days

STAKEHOLDER FILTERS

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

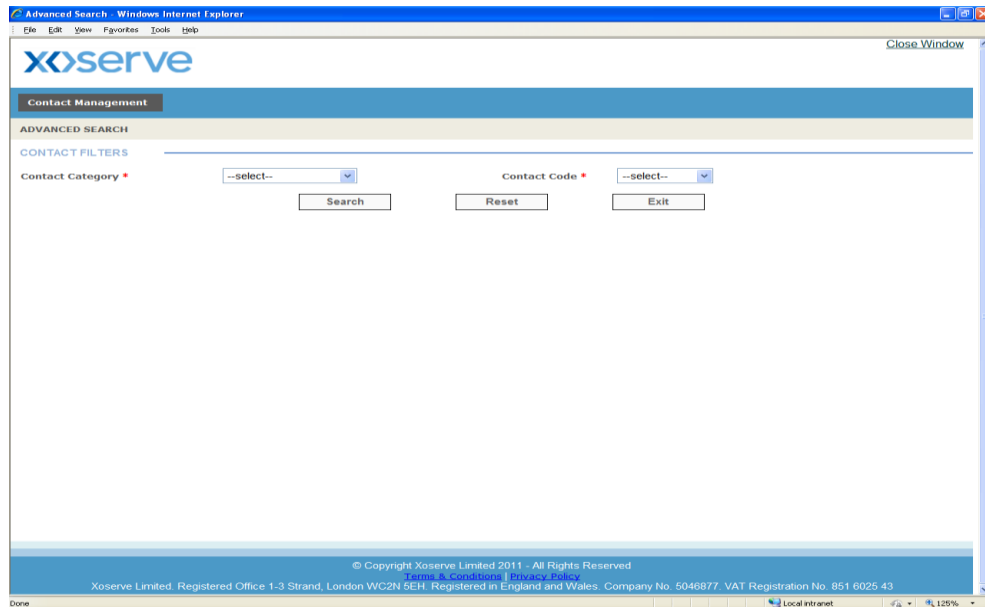
Search Reset Exit

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7.3 Advanced Search

New Search

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



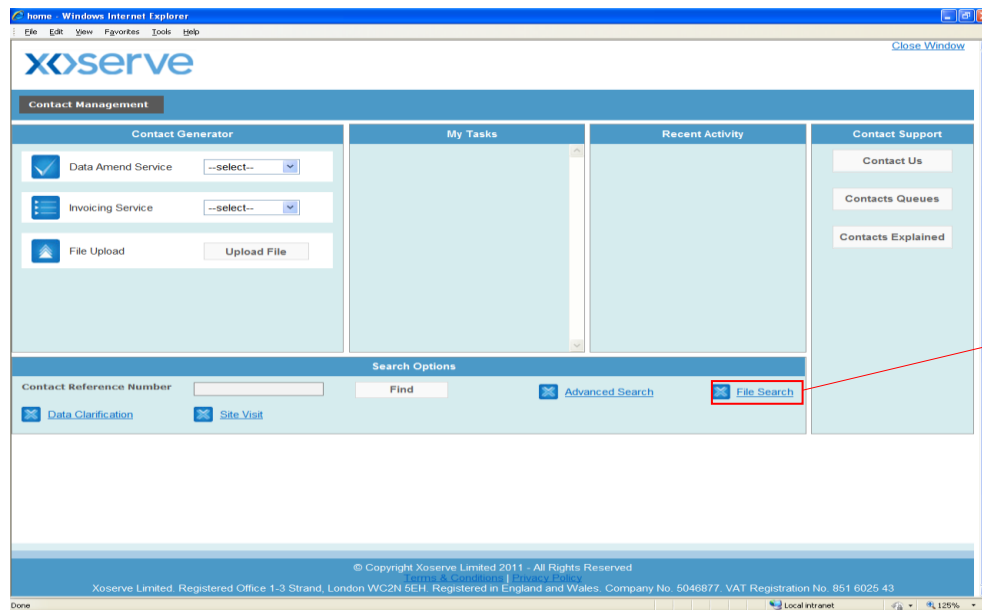
The screenshot shows a web browser window titled "Advanced Search - Windows Internet Explorer". The page features the Xserve logo at the top left. Below the logo is a navigation bar with "Contact Management" highlighted. The main content area is titled "ADVANCED SEARCH" and contains a section for "CONTACT FILTERS". This section includes 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 footer containing copyright information: "© Copyright Xserve Limited 2011. All Rights Reserved. Terms & Conditions Privacy Policy". The footer also mentions "Xserve 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" and "Local intranet".



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

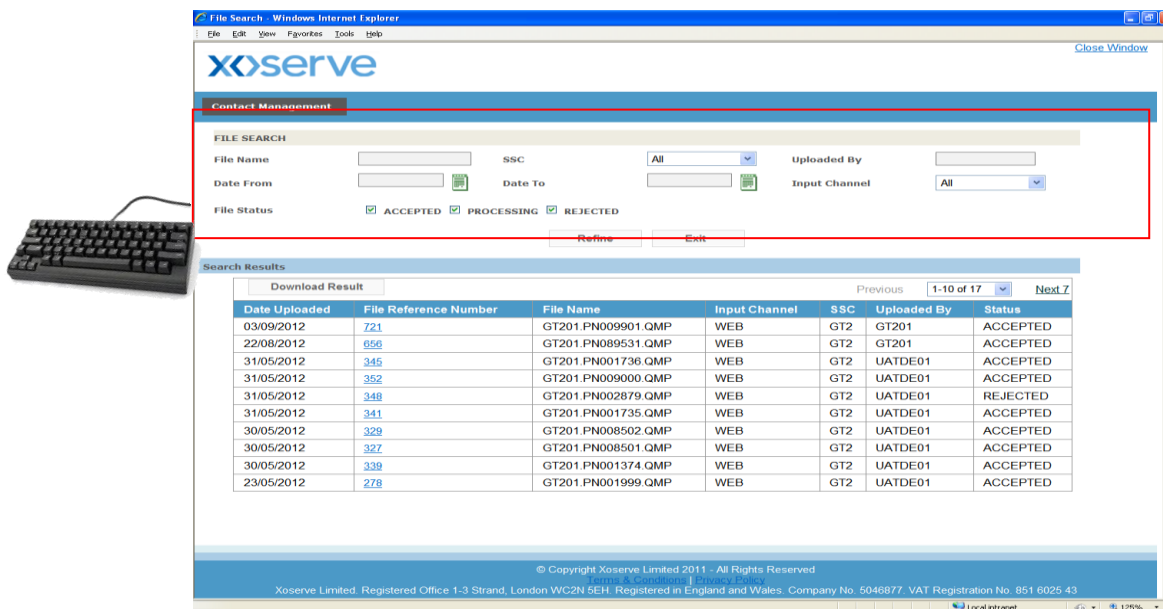
7.4 File Search

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



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

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



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

7.3 File Search

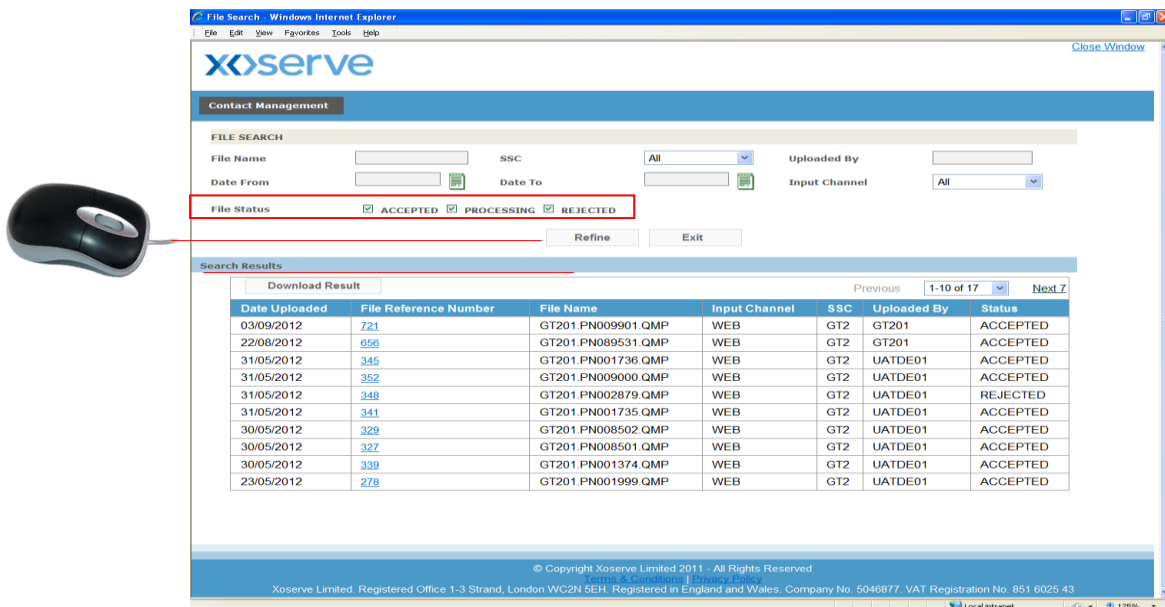
ACCEPTED: Means that each record has been through validation checks, however some of these records may have failed those checks. You will be able to identify these if you open up the file.

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

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



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



File Search - Windows Internet Explorer

FILE SEARCH

File Name: SSC: All Uploaded By:

Date From: Date To: Input Channel:

File Status: ☒ ACCEPTED ☒ PROCESSING ☒ REJECTED

Refine Exit

Search Results

Download Result

Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
03/09/2012	721	GT201.PN009901.QMP	WEB	GT2	GT201	ACCEPTED
22/08/2012	656	GT201.PN089531.QMP	WEB	GT2	GT201	ACCEPTED
31/05/2012	345	GT201.PN001736.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	352	GT201.PN009000.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	348	GT201.PN002879.QMP	WEB	GT2	UATDE01	REJECTED
31/05/2012	341	GT201.PN001735.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	329	GT201.PN008502.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	327	GT201.PN008501.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	339	GT201.PN001374.QMP	WEB	GT2	UATDE01	ACCEPTED
23/05/2012	278	GT201.PN001999.QMP	WEB	GT2	UATDE01	ACCEPTED


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



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

7.4 File Search



File Search - Windows Internet Explorer

Contact Management

FILE SEARCH

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

Search Results

Download Result Previous 1-10 of 14 Next 4

Date Uploaded	File Reference Number	File Name	Input Channel	SSC	Uploaded By	Status
03/09/2012	721	GT201.PN009901.QMP	WEB	GT2	GT201	ACCEPTED
22/08/2012	656	GT201.PN089531.QMP	WEB	GT2	GT201	ACCEPTED
31/05/2012	345	GT201.PN001736.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	352	GT201.PN009000.QMP	WEB	GT2	UATDE01	ACCEPTED
31/05/2012	341	GT201.PN001735.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	329	GT201.PN008502.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	327	GT201.PN008501.QMP	WEB	GT2	UATDE01	ACCEPTED
30/05/2012	339	GT201.PN001374.QMP	WEB	GT2	UATDE01	ACCEPTED
23/05/2012	278	GT201.PN001999.QMP	WEB	GT2	UATDE01	ACCEPTED
21/05/2012	267	GT201.PN080801.QMP	WEB	GT2	GT201	ACCEPTED

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

SearchResults - Windows Internet Explorer

Contact Management

FILE SEARCH

File Reference Number: 278 Contacts Logged On: 23/05/2012
Status: ACCEPTED Status Description: ACCEPTED

Search Results

By Contact Code: All By Contact Status: ☒ Accepted ☒ Rejected

Download Result

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

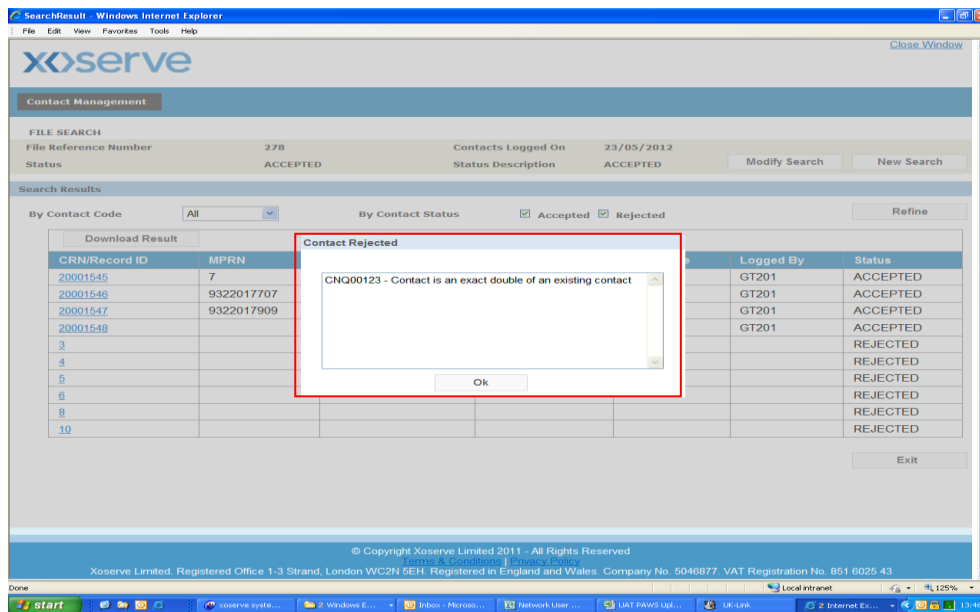
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File Reference selected.

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

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

7.4 File Search



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

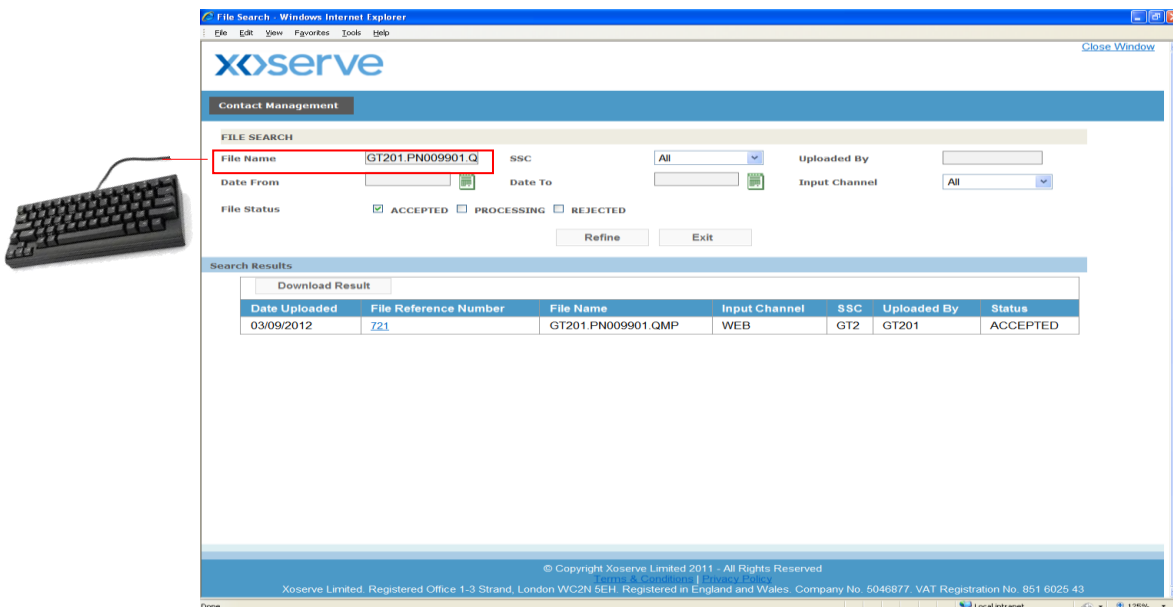
To complete a search using a specific file name...

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows.

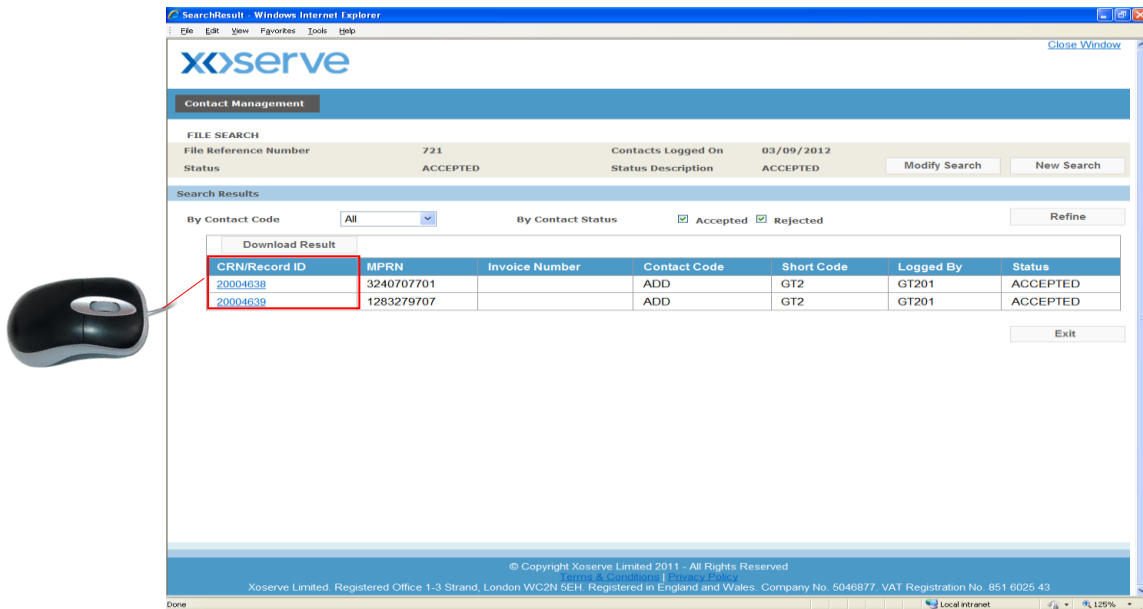


One of the File Status's must be selected in order for the search to bring back the appropriate results.

7.4 File Search

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

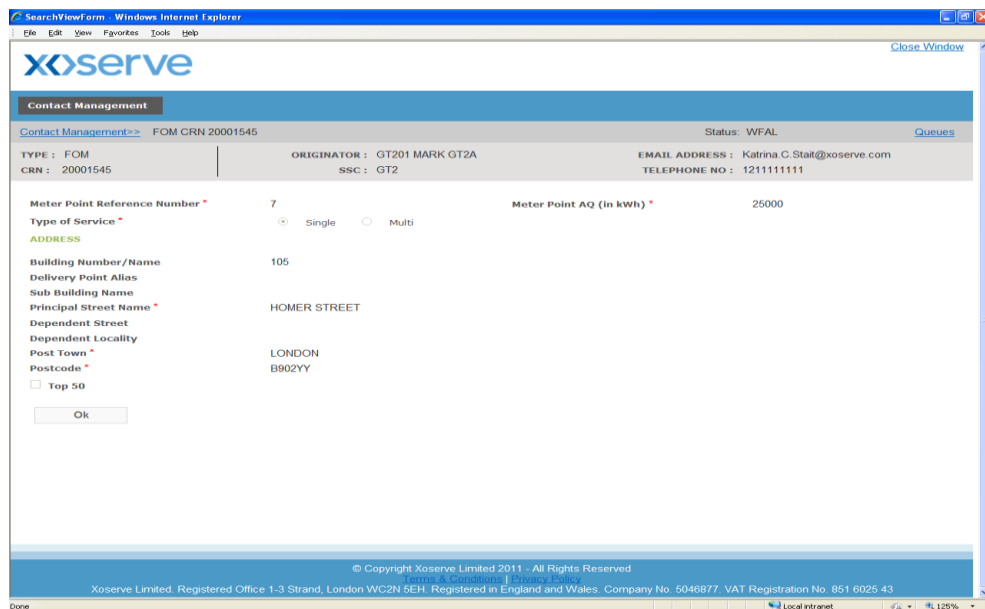
To drill down further, click on a specific Contact.



The screenshot shows the 'SearchResults' page in a Windows Internet Explorer browser. The page title is 'SearchResults - Windows Internet Explorer'. The Xoserve logo is at the top. Below the logo is a 'Contact Management' section. Under 'FILE SEARCH', the 'File Reference Number' is 721 and the 'Status' is ACCEPTED. The 'Contacts Logged On' date is 03/09/2012. There are buttons for 'Modify Search' and 'New Search'. Below this is the 'Search Results' section. It has filters for 'By Contact Code' (set to All) and 'By Contact Status' (with checkboxes for Accepted and Rejected). A 'Download Result' button is on the left. The main table has columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. Two records are shown, both with status 'ACCEPTED'. A mouse cursor is pointing to the first record's CRN/Record ID, '20004638'.

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20004638	3240707701		ADD	GT2	GT201	ACCEPTED
20004639	1283279707		ADD	GT2	GT201	ACCEPTED

The Accepted Contact will appear as follows....



The screenshot shows the 'SearchViewForm' page in a Windows Internet Explorer browser. The page title is 'SearchViewForm - Windows Internet Explorer'. The Xoserve logo is at the top. Below the logo is a 'Contact Management' section. Under 'Contact Management', the 'FOM CRN' is 20001545 and the 'Status' is WFAL. There are buttons for 'Queues' and 'Download Result'. The main form displays details for the contact. It includes fields for 'TYPE : FOM', 'CRN : 20001545', 'ORIGINATOR : GT201 MARK GT2A', 'SSC : GT2', 'EMAIL ADDRESS : Katrina.C.Stall@xoserve.com', and 'TELEPHONE NO : 1211111111'. Below these are fields for 'Meter Point Reference Number' (7), 'Type of Service' (Single), 'Meter Point AQ (in kWh)' (25000), 'ADDRESS', 'Building Number/Name' (105), 'Delivery Point Alias', 'Sub Building Name', 'Principal Street Name' (HOMER STREET), 'Dependent Street', 'Dependent Locality', 'Post Town' (LONDON), and 'Postcode' (B902YY). There is a 'Top 50' checkbox and an 'Ok' button.

TYPE : FOM
CRN : 20001545

ORIGINATOR : GT201 MARK GT2A
SSC : GT2

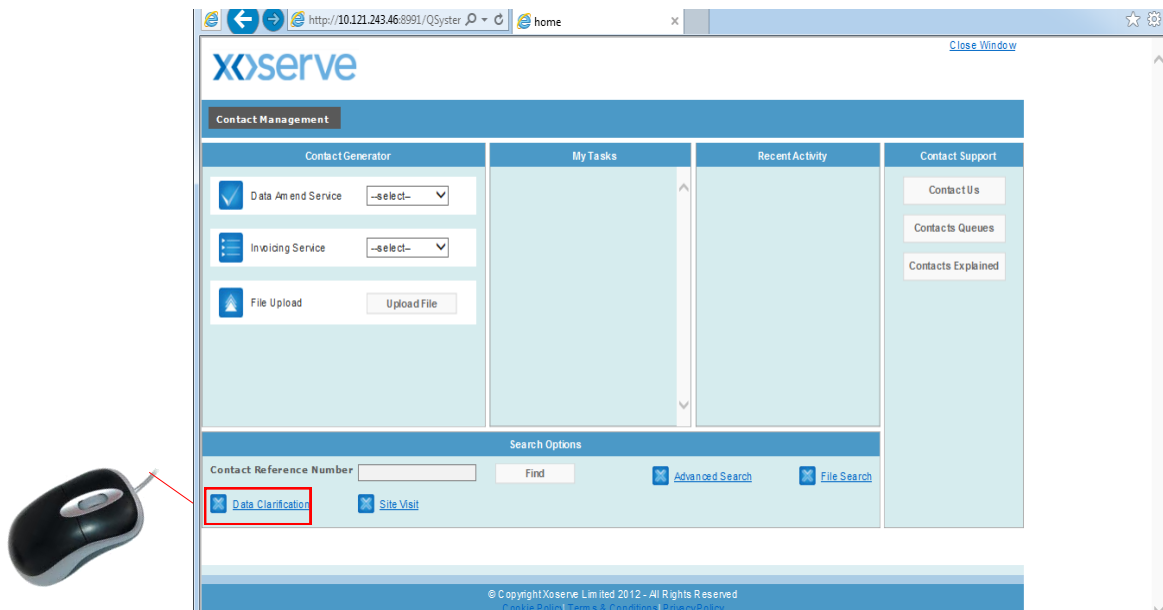
EMAIL ADDRESS : Katrina.C.Stall@xoserve.com
TELEPHONE NO : 1211111111

Meter Point Reference Number * 7
Type of Service * ☒ Single ☐ Multi
Meter Point AQ (in kWh) * 25000

ADDRESS
Building Number/Name 105
Delivery Point Alias
Sub Building Name
Principal Street Name * HOMER STREET
Dependent Street
Dependent Locality
Post Town * LONDON
Postcode * B902YY
☐ Top 50
Ok

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.

The screenshot shows the Xoserve Data Clarification Search page. The 'Search' button is highlighted with a red box. The page includes various filters for searching, such as 'Contact Reference Number', 'Contact Code', 'Case Event Description', 'Date From', 'Date To', 'SSC', and 'Meter Point Reference Number'. The 'Search' button is located at the bottom of the search filters section.

This search button is for the basic search.

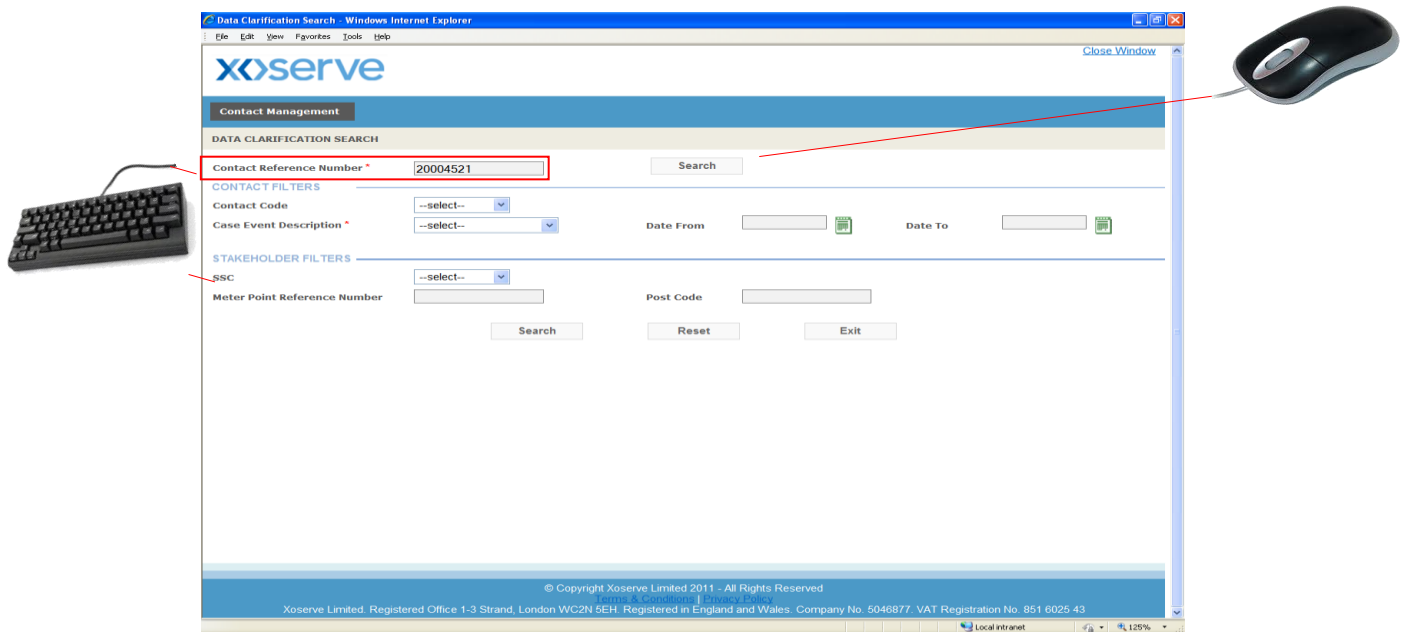
Search can be completed via CRN or various Filters. A CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

7.5 Data Clarification Search

Basic Search

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

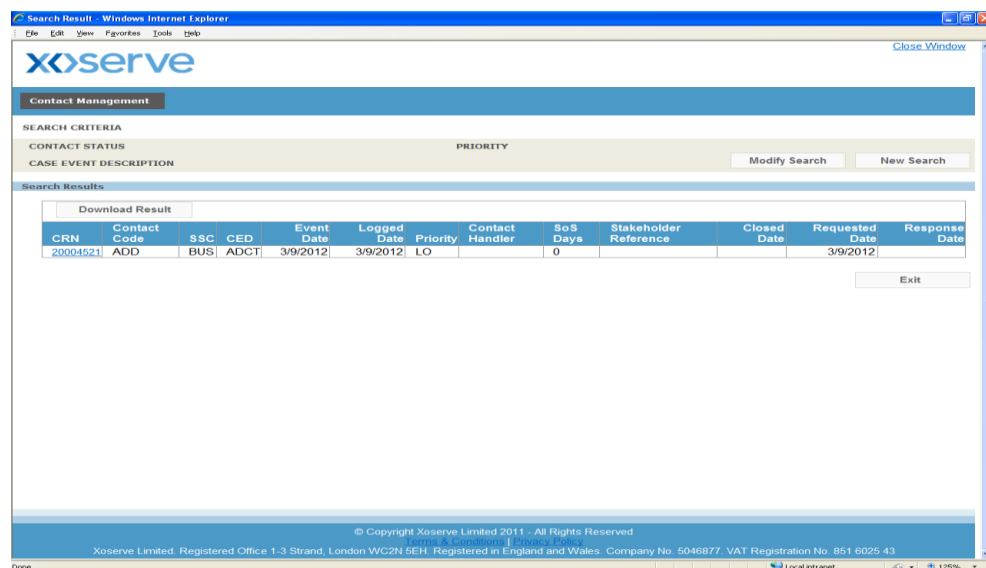
Step 2 – Click Search.



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

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The results will be displayed as follows....



The screenshot shows the 'Search Results' window in Internet Explorer. It displays a table with search results for CRN 20004521. The table has columns for CRN, Contact Code, SSC, CED, Event Date, Logged Date, Priority, Contact Handler, SoS Days, Stakeholder Reference, Closed Date, Requested Date, and Response Date.

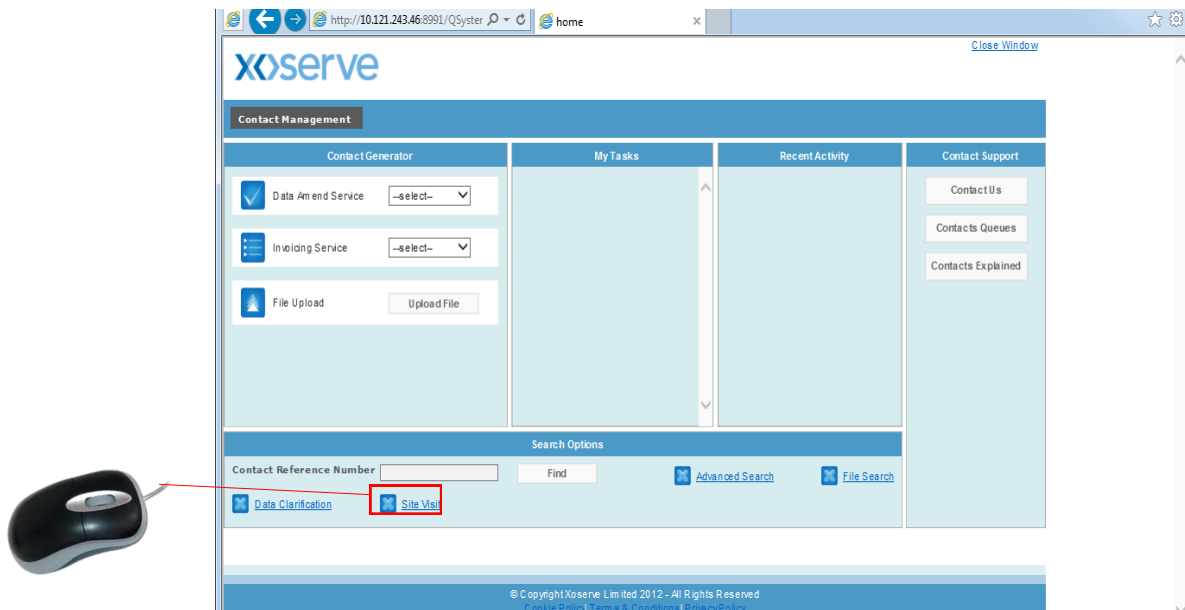
CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date
20004521	ADD	BUS	ADCT	3/9/2012	3/9/2012	LO		0			3/9/2012	

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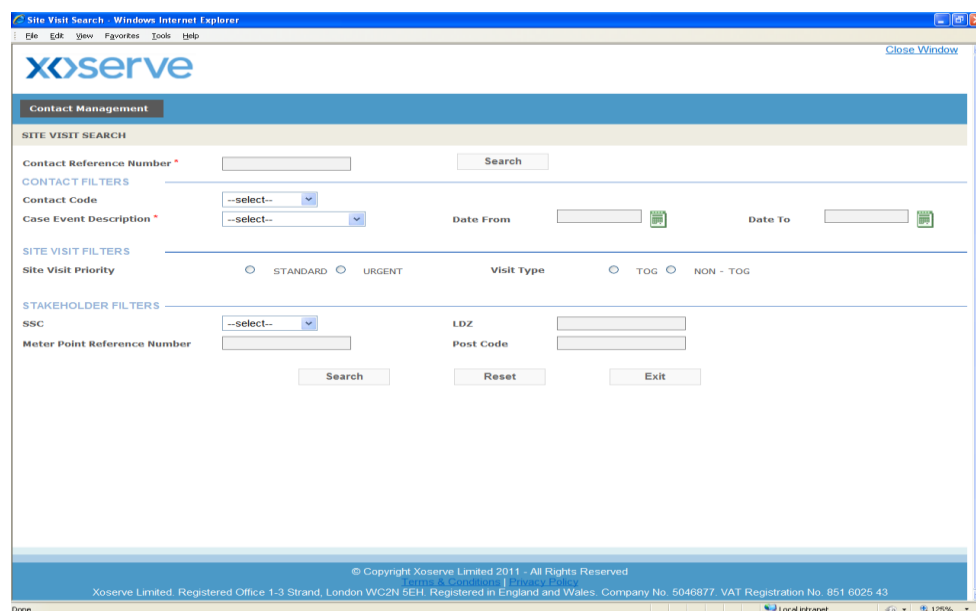
Select the CRN and the Data Clarification form will appear.

7.6 Site Visit Search

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



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



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

7.6 Site Visit Search

Basic Search

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

Step 2 – Click Search.

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

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The results will be displayed as follows....

The screenshot shows the 'Search Result' window in Internet Explorer. The table below displays the search results.

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

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Select the CRN and the Site Visit will appear.

7.6 Site Visit Search

Filter Search

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

Step 2 – Click Search



Further search criteria are available in the Stakeholder Filters section

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

CONTACT FILTERS

Contact Reference Number * Search

Contact Code

Case Event Description *

Date From Date To

SITE VISIT FILTERS

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

STAKEHOLDER FILTERS

SSC LDZ

Meter Point Reference Number Postcode

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The result will be displayed as follows....

SEARCH CRITERIA

CONTACT STATUS PRIORITY

CASE EVENT DESCRIPTION

Search Results

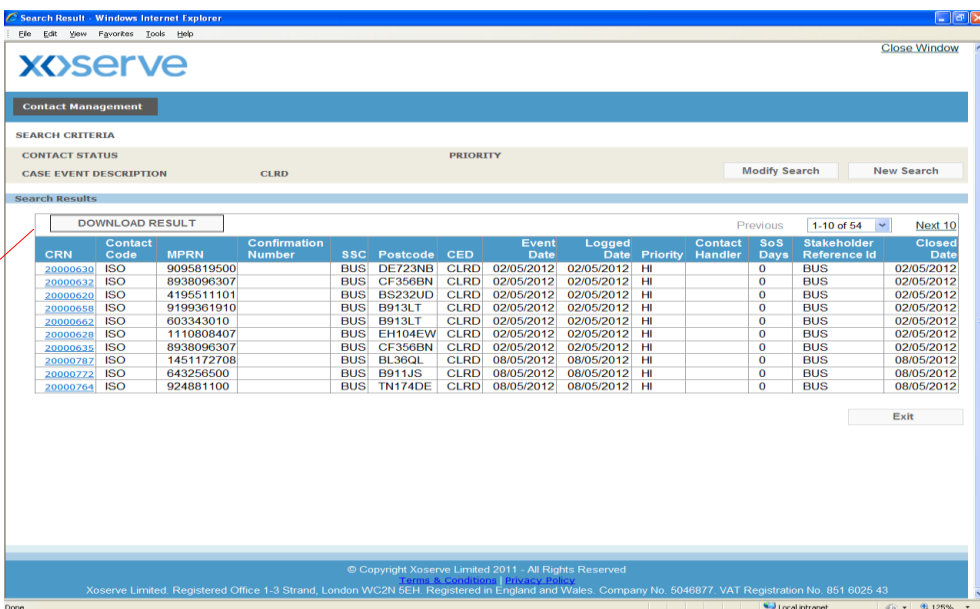
CRN	Contact Code	SSC	CED	Event Date	Logged Date	Priority	Contact Handler	SoS Days	Stakeholder Reference	Closed Date	Requested Date	Response Date	LDZ
20746302	DTL		IGTR	23/2/2016	11/11/2015	HI		0			11/11/2015	23/2/2016	

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Select the CRN and the Site Visit will appear.

7.7 Download results

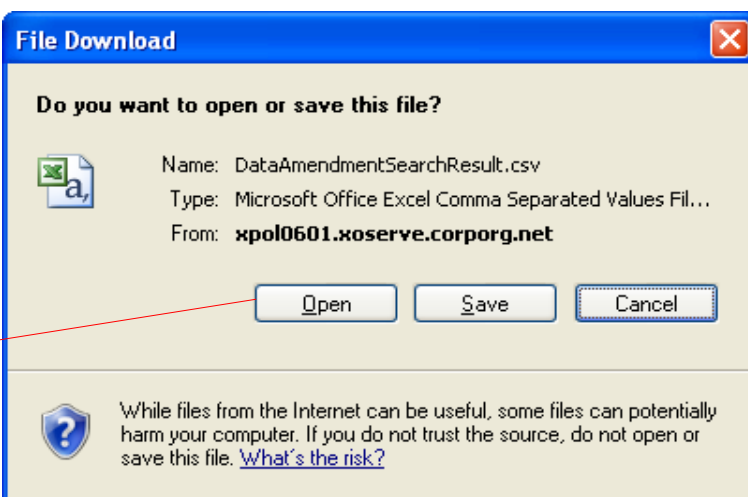
The Download Results facility is available on Advanced Search, File Search, Data Clarification and Site Visit.



The screenshot shows the Xserve web application interface. At the top, there's a 'Search Results' header. Below it, a 'Contact Management' section is visible. The main area displays search criteria and a table of results. A red arrow points from a mouse cursor to the 'DOWNLOAD RESULT' button in the table's header row.

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

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



The screenshot shows a 'File Download' dialog box. It asks 'Do you want to open or save this file?'. The file name is 'DataAmendmentSearchResult.csv', the type is 'Microsoft Office Excel Comma Separated Values Fil...', and it's from 'xpol0601.xoserve.corporg.net'. There are 'Open', 'Save', and 'Cancel' buttons. A red arrow points from a mouse cursor to the 'Open' button. At the bottom, there's a warning icon and text: 'While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)'

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



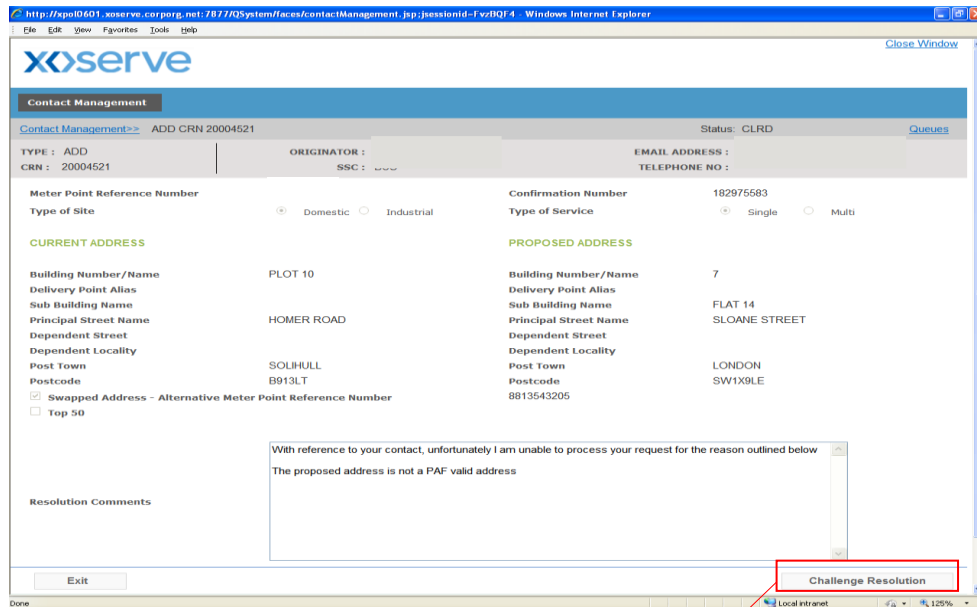
Previously Submitted Contacts



8.1 Raising a Previously Submitted Contact

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

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



The screenshot shows the xoserve Contact Management interface. At the top, the status is 'CLRD'. The contact details include: TYPE: ADD, CRN: 20004521, ORIGINATOR: SSC: www, EMAIL ADDRESS: 182975583, and TELEPHONE NO: 182975583. The contact has a 'Meter Point Reference Number' and a 'Type of Site' (Domestic). The 'CURRENT ADDRESS' is listed with details: Building Number/Name: PLOT 10, Delivery Point Alias: HOMER ROAD, Sub Building Name: SOLIHULL, Principal Street Name: B913LT, Dependent Street: SOLIHULL, Post Town: B913LT, Postcode: 8813543205. The 'PROPOSED ADDRESS' is also listed: Building Number/Name: 7, Delivery Point Alias: FLAT 14, Sub Building Name: SLOANE STREET, Principal Street Name: LONDON, Dependent Street: SW1X9LE, Post Town: SW1X9LE, Postcode: 8813543205. A resolution comment is displayed: 'With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. The proposed address is not a PAF valid address.' At the bottom right, there is a 'Challenge Resolution' button.

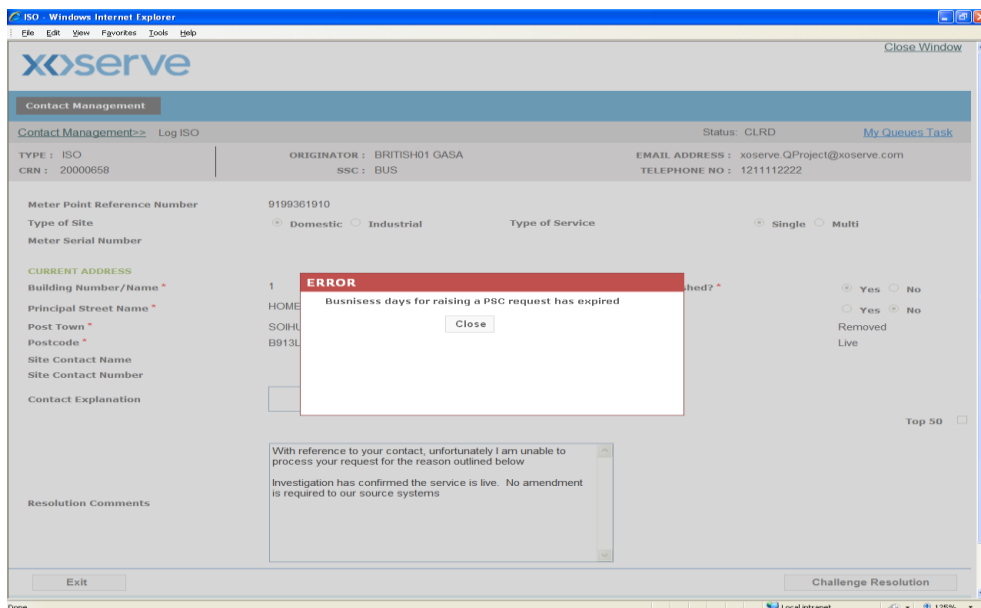


You are not able to edit any details on this screen



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

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



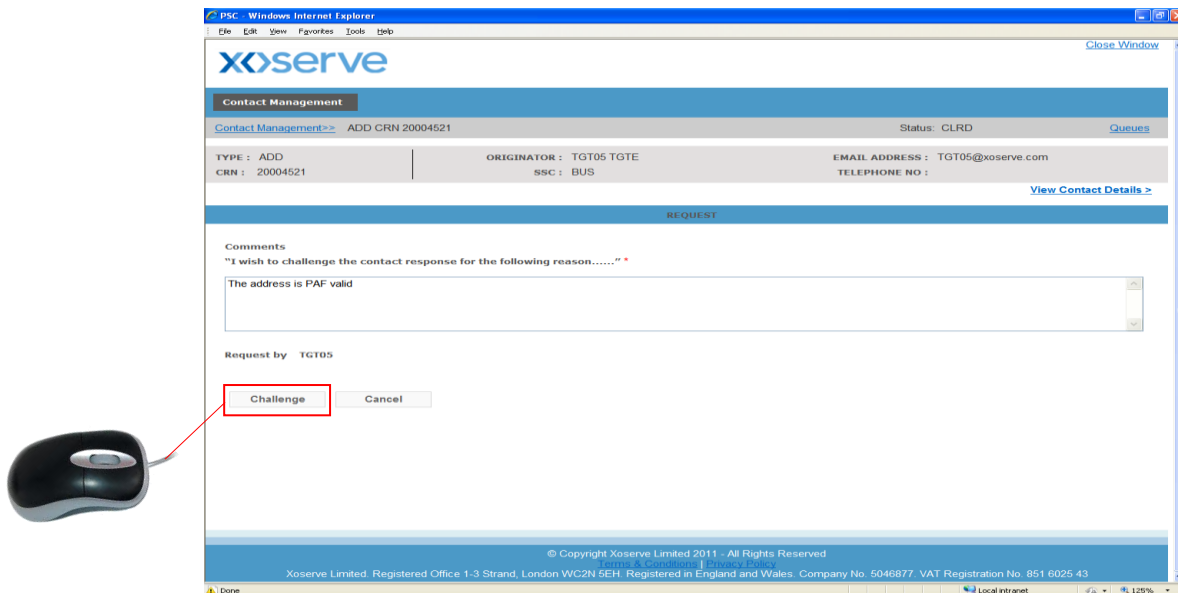
The screenshot shows the xoserve Contact Management interface. At the top, the status is 'CLRD'. The contact details include: TYPE: ISO, CRN: 20000658, ORIGINATOR: BRITISH01 GASA, SSC: BUS, EMAIL ADDRESS: xoserve.QProject@xoserve.com, and TELEPHONE NO: 1211112222. The contact has a 'Meter Point Reference Number' and a 'Type of Site' (Domestic). The 'CURRENT ADDRESS' is listed with details: Building Number/Name: 1, Delivery Point Alias: HOMER ROAD, Sub Building Name: SOLIHULL, Principal Street Name: B913LT, Dependent Street: SOLIHULL, Post Town: B913LT, Postcode: 8813543205. The 'PROPOSED ADDRESS' is also listed: Building Number/Name: 7, Delivery Point Alias: FLAT 14, Sub Building Name: SLOANE STREET, Principal Street Name: LONDON, Dependent Street: SW1X9LE, Post Town: SW1X9LE, Postcode: 8813543205. A resolution comment is displayed: '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.' At the bottom right, there is a 'Challenge Resolution' button.

8.1 Raising a Previously Submitted Contact


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


Step 1 – Enter your comments

Step 2 – Click Challenge.

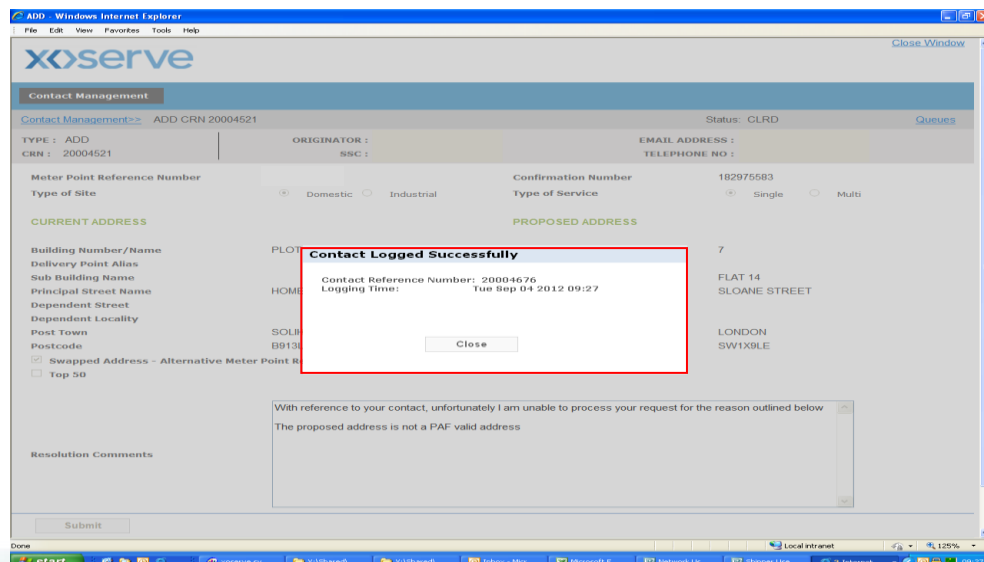


The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser. The page title is "Contact Management" and the status is "CLRD". The contact details are: TYPE: ADD, CRN: 20004521, ORIGINATOR: TGT05 TGTE, SSC: BUS, EMAIL ADDRESS: TGT05@xoserve.com, and TELEPHONE NO: . The "REQUEST" section has a "Comments" box containing the text "I wish to challenge the contact response for the following reason....." and "The address is PAF valid". Below the comments box, the "Request by" field shows "TGT05". At the bottom of the form, the "Challenge" button is highlighted with a red box, and a mouse cursor is pointing at it. The "Cancel" button is also visible.

 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 "Contact Management" and the status is "CLRD". The contact details are: TYPE: ADD, CRN: 20004521, ORIGINATOR: SSC, EMAIL ADDRESS: , and TELEPHONE NO: . The "CURRENT ADDRESS" section shows: Building Number/Name: , Delivery Point Alias: , Sub Building Name: , Principal Street Name: , Dependent Street: , Dependent Locality: , Post Town: , Postcode: B913, and Swapped Address - Alternative Meter Point: . The "PROPOSED ADDRESS" section shows: Confirmation Number: 182975583, Type of Service: Single, and Multi: . A red box highlights the "Contact Logged Successfully" message, which includes the Contact Reference Number: 20004676 and the Logging Time: Tue Sep 04 2012 09:27. The "Close" button is visible below the message. The "Resolution Comments" section contains the text: "With reference to your contact, unfortunately I am unable to process your request for the reason outlined below. The proposed address is not a PAF valid address."

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

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

Meter Point Reference Number
Type of Site: ☒ Domestic ☐ Industrial

CURRENT ADDRESS

Building Number/Name	PLOT 10
Delivery Point Alias	
Sub Building Name	
Principal Street Name	HOMER ROAD
Dependent Street	
Dependent Locality	
Post Town	SOLIHULL
Postcode	B913LT

☒ Swapped Address - Alternative Meter Point Reference Number
☐ Top 50

PROPOSED ADDRESS

Building Number/Name	7
Delivery Point Alias	
Sub Building Name	FLAT 14
Principal Street Name	SLOANE STREET
Dependent Street	
Dependent Locality	
Post Town	LONDON
Postcode	SW1X9LE

8813543205

Resolution Comments

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

Buttons: Exit, Challenge Resolution



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