ACCOUNT MANAGEMENT PORTAL HOW-TO GUIDE

CONTENTS

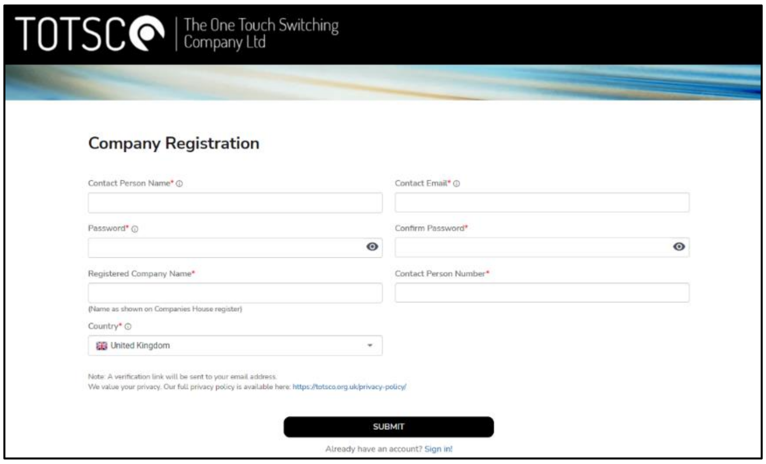
Here is a helpful how-to guide for our Account Management Portal.

INITIAL
ONBOARDING

There are two stages to onboarding with the TOTSCo Hub:

- Initial onboarding is for verification purposes and to set up your account.
- Commercial onboarding is where you will provide your brand details, account information and payment preferences and sign the user agreement.

Once you have completed both steps you will gain access to the hub and given your RCPID.



You do not need to onboard with us if you are going to use a Full Management MAP, you onboard with your MAP.

After clicking 'Become a TOTSCo Hub User' on the TOTSCo home page of the website, you will be taken to the registration page, which consists of the following fields:

INITIAL ONBOARDING

a. **Contact Person Name** – this person should be authorised to apply for this service within the organisation.
b. **Contact Email** – This will be your username. It should be a business email address.
c. **Password** - Enter a password for future login. Must be between 8 to 64 characters, at least one lower case letter, at least one upper case letter, at least one number and must contain one of these special characters #$@&*!
d. **Confirm Password** - Re-enter the password for future login.
e. **Registered Company Name** – please confirm the name of the legal entity you are registered with at Companies House. If you have more than one Brand this will need to be registered later in the onboarding process.
f. **Contact Person Number** – contact number for the person registering.
g. **Country** - This is the country in which the retail business operates. The TOTSCo Hub is only applicable to UK retailers.

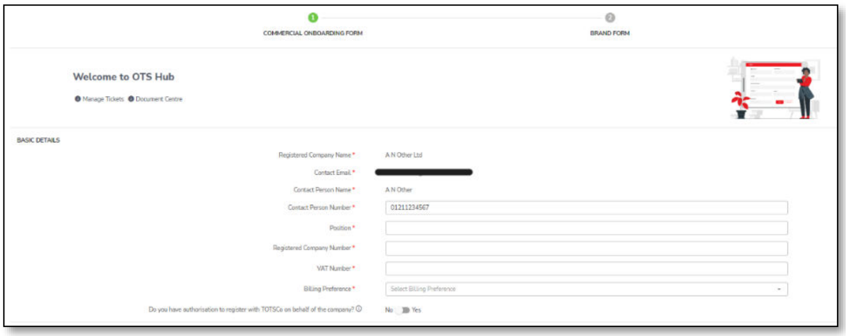
Once you submit your application you will receive a verification email. You must click the verification in the email to be able to proceed to the next step. The email link will expire after 10 days. If the link has already expired by the time you try to open it, reply to the email explaining the situation and you will be issued a new link.

Please remember to check your junk email if you do not receive the email in your inbox. If you do not receive the verification email within 24 hours, please contact us at service_desk@totsco.org.uk. Once you have successfully verified your account, you will receive a further email.

COMMERCIAL
ONBOARDING

When you are ready to commercially onboard, we will take you through a simple two-step process.

When you log in for the first time, you will need to set up Two-Factor Authentication to activate your account. If you need help, here is a how-to guide for setting it up.



SECTION ONE – COMMERCIAL ONBOARDING FORM

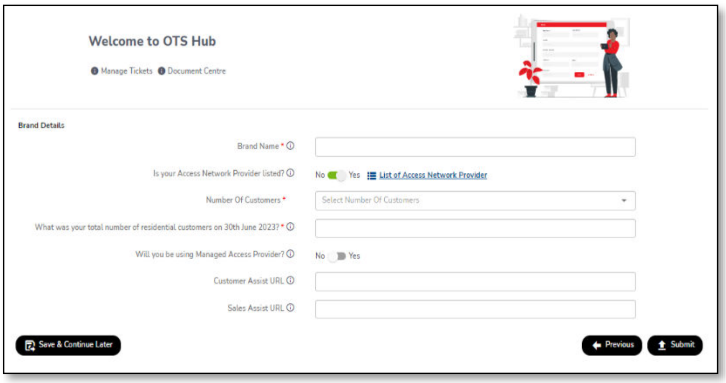
You will initially be asked for the following basic information:

- **a.** **Registered Company Name** - this will be prepopulated; you can change this if you wish.
- **b.** **Contact Email** - this will be prepopulated; you can change this if you wish.
- **c.** **Contact Person Name -** this will be prepopulated; you can change this if you wish.
- **d.** **Contact Person Number** - this will be prepopulated; you can change this if you wish.
- **e.** **Position** - this is the role of the person making the application who will become the contact person within the organisation.
- **f.** **Registered Company Number** - This should be the number registered with Company House.
- **g.** **VAT Number** - enter your registered VAT number.
- **h.** **Billing preferences** - This is a drop down with two options, Annual and Quarterly.
- **i.** **Do you have authorisation to register with TOTSCo on behalf of the company?** - This a Yes/No toggle field. Selecting 'No' will prevent further progress with registration.

The next section is the address section:

- **a.** **Country** - this will be pre-populated from your initial Onboarding. The TOTSCo Hub is only applicable to UK and Irish retailers.
- **b.** **Registered Company Address** - Enter the registered Company Address as appears on the Company House register.
- **c.** **Postcode** - Enter the post code of the registered company.

The next section is all about your brand. Your brand will appear in the directory, so it's important you use the name you are known to by your customers.



SECTION TWO – BRAND FORM

a. **Brand Name** - Please enter your brand name. This brand name will appear in the directory and should reflect how you are known to your customers (the name on the bill). You can include any aliases or previous names to help your customers identify you. Please use brackets () to indicate terms such as 'also known as' and/or 'formerly known as'.
b. **Is your Access Network Provider (ACP) listed?** - The list is alphabetical. If your ACP is in the list, check the box. If your ACP is not in the list please insert the name in the box.
c. **Number of Customers** - This is a drop-down field. Select the number range that matches the number of customers you currently have.
d. **Number of customers, as on 30 June 2023** - this information will be used to help determine billing, therefore it is important it is accurate.
e. **Will you be using a Managed Access Provider?** - If you are using a Managed Access Provider (MAP), select "Yes". A new field will appear below asking for the name of the MAP. If you are a CP and unsure of whether you will be using a Managed Access Provider select "No". You can transfer to a Managed Access Provider later. If you are using a fully managed MAP, you do not need to onboard with us, you onboard directly with your MAP.
f. **Customer URL** - You may want to add a URL with content suitable for customer self-service. This page could contain information to help customers locate details that will assist them in the matching process such as account number. If you re only intending to use one of the URL pages, or to use the same URL for both functions, please add it to both the Customer Assist URL and Sales Assist URLs. These URLs will appear in the hub directory.
g. **Sales URL** - As explained above.

Once you have submitted your information, TOTSCo Support will review your application to assure that we have all the necessary information. We will revert to you if there are any outstanding aspects or clarifications. Once accepted, we will send you an email asking you to log in and sign your User Agreement.

SIGNING YOUR USER AGREEMENT

Next important step is signing your User Agreement. We will send you an email to confirm your validation checks are complete and ask you to log in to the portal and go to the Manage User Agreement Section. To proceed, click on 'send', you will then receive an email from DocuSign asking you to review and sign the User Agreement. Once signed you will receive an email confirmation from DocuSign. Your User Agreement will then be sent to TOTSCo for countersigning.

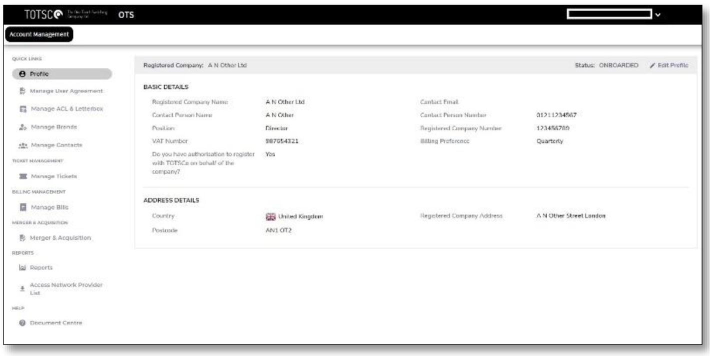
You will gain full functionality of the portal when the User Agreement has been countersigned and uploaded into your account.

You will receive one final email which confirms the setup of your Brand and you will then be given your unique RCPID number. The completed signed User Agreement is also attached in pdf format. You can always view this in the 'Manage User Agreement' section of the portal.

You are now a fully onboarded TOTSCO Hub user.

MANAGING YOUR ACCOUNT

Once you have completed commercial onboarding, you will have access to the Account Management Portal. This is a portal from where you can make changes to your account, raise fault and enquiry tickets, and view your invoices and usage reports.



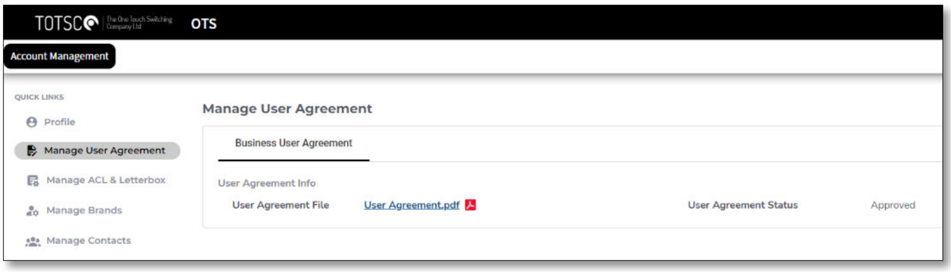
In the Account Management Portal you can manage the following:

1. User Agreement
2. ACL & Letterbox
3. Brands
4. Contacts
5. Tickets
6. Bills
7. Merger and Acquisition
8. Reports
9. Access Network Provider List

Below is a breakdown of each section and what you can do in each.

1. Manage User Agreement

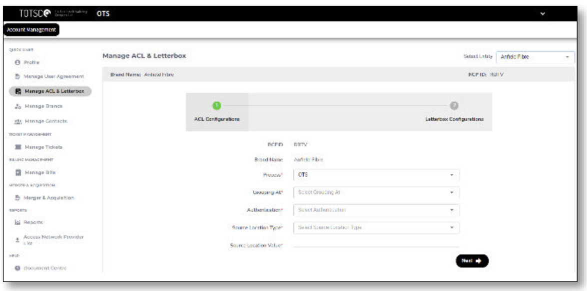
In this section you can check the status, view and download your User Agreement.



2. Manage ACL & Letterbox

For now, we would prefer that you email the service desk with all your prerequisite testing information.

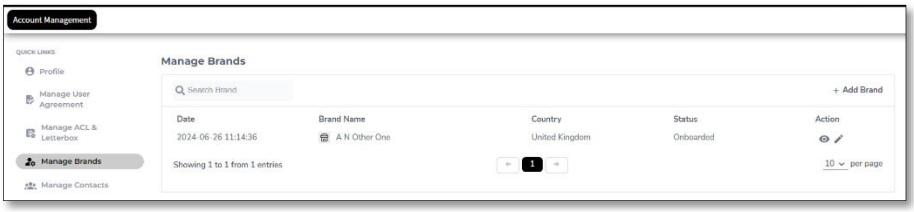
We will advise you when this part of the portal can be used.



3. Manage Brands

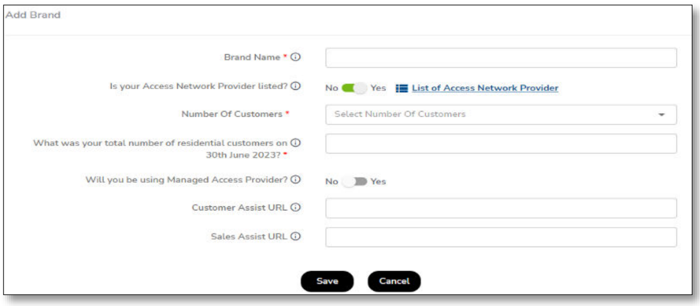
Here you can add any brands that are part of your organisation.

Here you can view, add and manage your brand/s. You will also see any actions that are required.



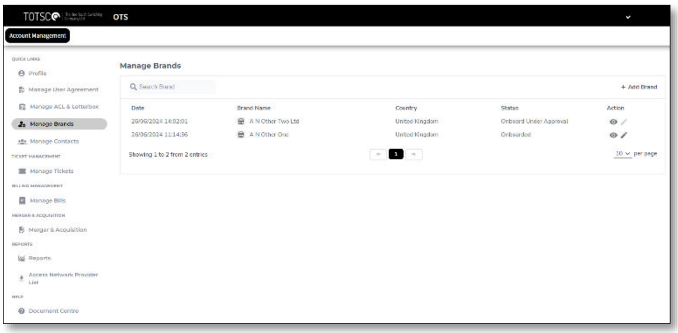
To add a brand, click on ‘Add Brand’ on the right side of the screen. The ‘Add Brand’ screen will now appear. Enter relevant details for the new brand.

Once completed then click on Save. The Manage Brand screen will reappear. Note the status of the new brand is ‘Onboard Under Approval’.



You will receive an email confirming registration of the brand. Once we have completed the necessary validation checks you will receive an email confirming registration of the new brand along with your unique RCPID number.

All your brands will then appear in the main screen.

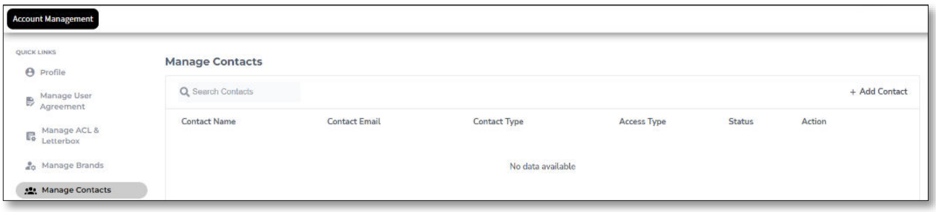


If you would like to amend your brand name, please contact the Service Desk or raise a ticket (see section 5).

4. Manage Contacts

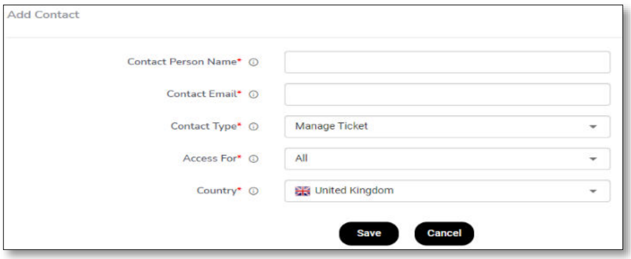
Here you have the ability to add colleagues into your account to manage the following activities:

- Manage tickets
- Manage Billing
- Technical configurator
- Manage Reports
- Manage Security

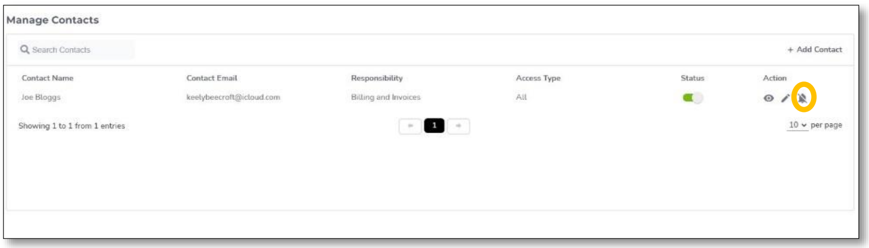


Click on ‘add contact’ for the following screen to appear. You can now add all the relevant details of the person you wish to add.

Once you have saved the details, the contact you have added will receive an email confirming an account has been set up. We will provide a temporary password, they can change when they log in.



Make sure you have enabled notifications, by clicking on the bell icon. This will make sure your contacts receive all relevant communications.



5. Manage Tickets

The admin account holder and anyone you have nominated in your company who has been given the 'Manage Ticket' role has the authority to raise tickets for any of the brands that your company is affiliated with.

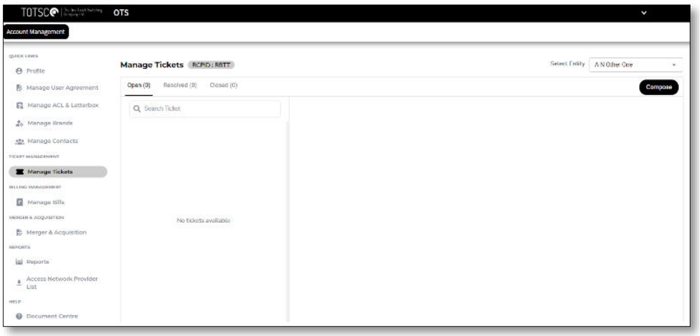
The first step is to login to the Account Management Portal and then click on 'Manage Tickets' on the left side of the screen.

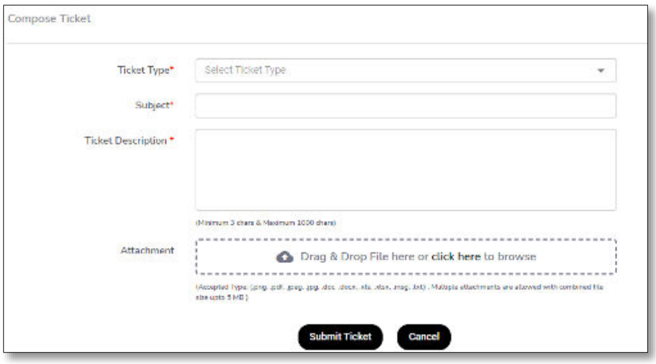
Then go to 'Select Entity' and choose the Company/Brand from the dropdown list for whom ticket needs to be raised. Then click on 'Compose'.

You will asked to complete the following fields:

Ticket Type - This is a drop down list. Please choose appropriate option that matches your query.
Subject - Enter a brief subject to describe the query.
Ticket Description - Please enter as much information as possible about the issue.
Attachment - Please attach any supporting information.

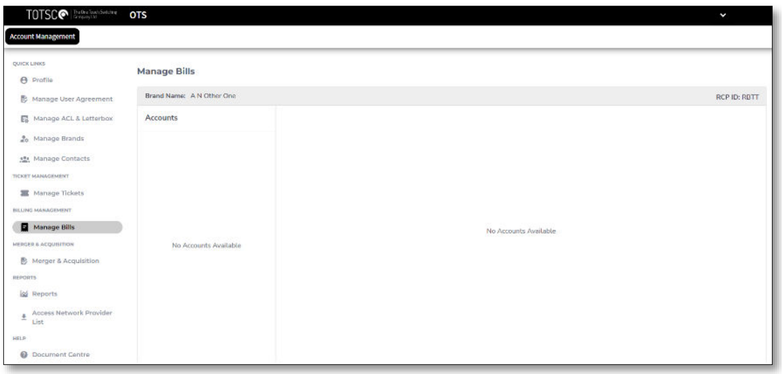
Then click on 'Submit Ticket'. You will receive a confirmation email that your ticket has been raised, with a ticket number.



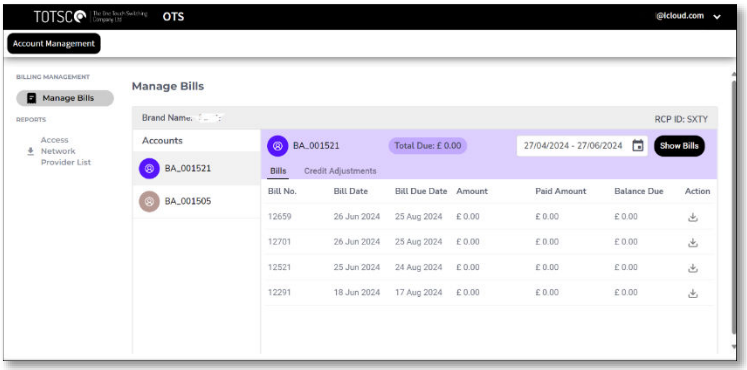


6. Manage Bills

In this section you will be able to view your account, view and download your invoices.

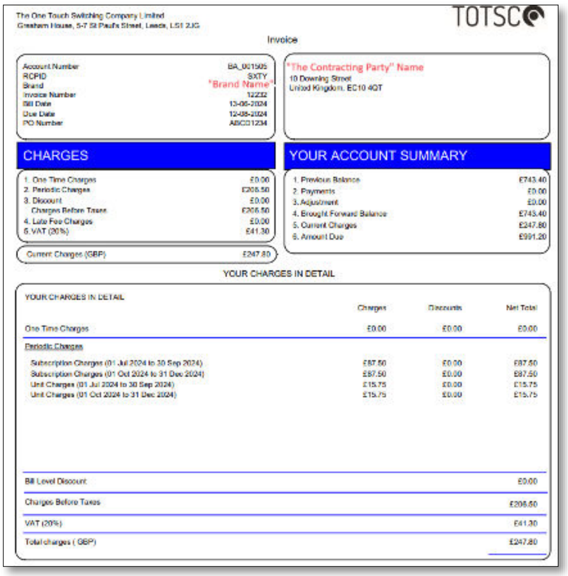


If you have multiple brands, you can view payments and invoices all in one place if you have the required access to view all. If you only have single brand access, you will be able to view your brand payments and invoices here.



Here is an example of an invoice.

- The Contracting Party Name - is your registered company Name.
- Brand name - the brand your company is known as by your customers.



The One Touch Switching Company Limited
Gresham House, 5-7 St Paul's Street, Leeds, LS1 2JG

TOTSC

Invoice

Account Number	BA_001505
RCPID	SXTY
Brand	"Brand Name"
Invoice Number	12232
Bill Date	13-06-2024
Due Date	12-08-2024
PO Number	ABCD1234

"The Contracting Party" Name
10 Downing Street
United Kingdom, EC10 4QT

CHARGES

1. One Time Charges	£0.00
2. Periodic Charges	£206.50
3. Discount	£0.00
Charges Before Taxes	£206.50
4. Late Fee Charges	£0.00
5. VAT (20%)	£41.30
Current Charges (GBP)	£247.80

YOUR ACCOUNT SUMMARY

1. Previous Balance	£743.40
2. Payments	£0.00
3. Adjustment	£0.00
4. Brought Forward Balance	£743.40
5. Current Charges	£247.80
6. Amount Due	£991.20

YOUR CHARGES IN DETAIL

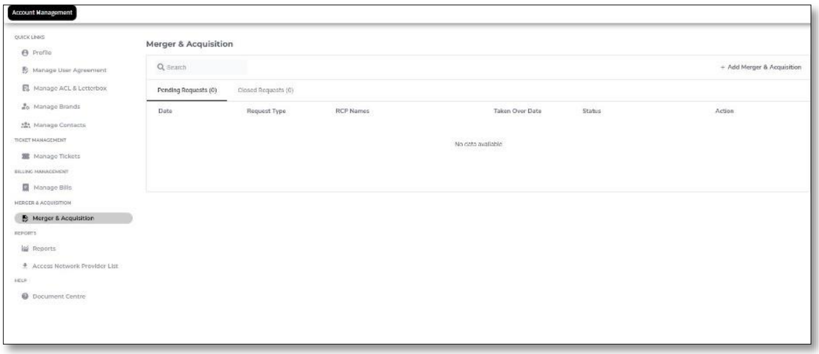
YOUR CHARGES IN DETAIL	Charges	Discounts	Net Total
One Time Charges	£0.00	£0.00	£0.00
Periodic Charges			
Subscription Charges (01 Jul 2024 to 30 Sep 2024)	£87.50	£0.00	£87.50
Subscription Charges (01 Oct 2024 to 31 Dec 2024)	£87.50	£0.00	£87.50
Unit Charges (01 Jul 2024 to 30 Sep 2024)	£15.75	£0.00	£15.75
Unit Charges (01 Oct 2024 to 31 Dec 2024)	£15.75	£0.00	£15.75
Bill Level Discount			£0.00
Charges Before Taxes			£206.50
VAT (20%)			£41.30
Total charges (GBP)			£247.80

Please ensure that you have enabled notifications (refer to Manage Contacts) to ensure that your nominated finance contact receives all finance-related communications, including notifications when your bill is ready.

PURCHASE ORDERS - If your organisation operates with a Purchase Order (PO) system, please kindly inform us, by emailing the Service Desk at your earliest convenience. Providing the details of your PO process will help us comply with your payment protocols and avoid any potential delays.

7. Merger and Acquisition

If your organisation goes through a merger or acquisition, here you can add the details. All you need to do is click on 'Add Merger & Acquisition' and then the information screen will appear asking for all the relevant information.



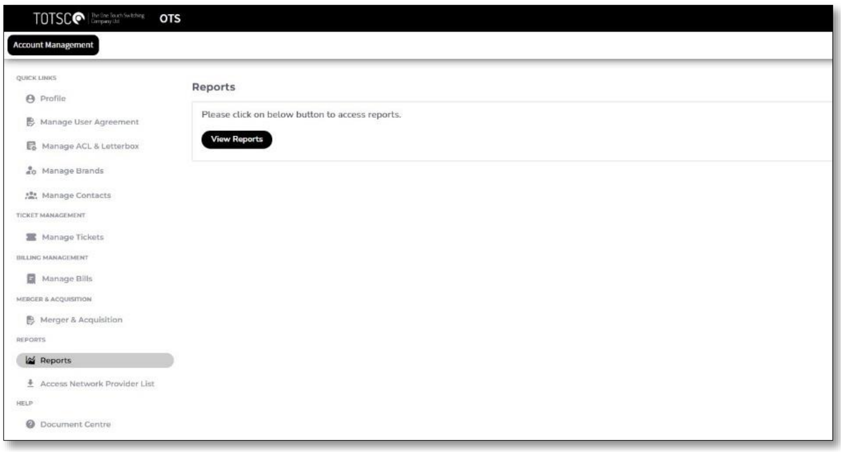
8. Reports

There are currently two reports available to you, which are:

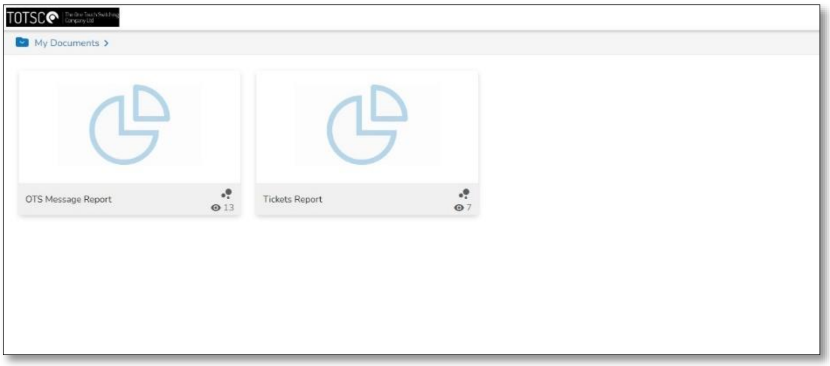
OTS Message Report - shows you the messages you have sent and received in the Production (live) hub.

Ticket Report – displays the status and details of tickets you have raised by CP and brand. Only tickets raised via the portal will be shown here.

You can access reports by clicking on 'Reports', then on 'View reports'.

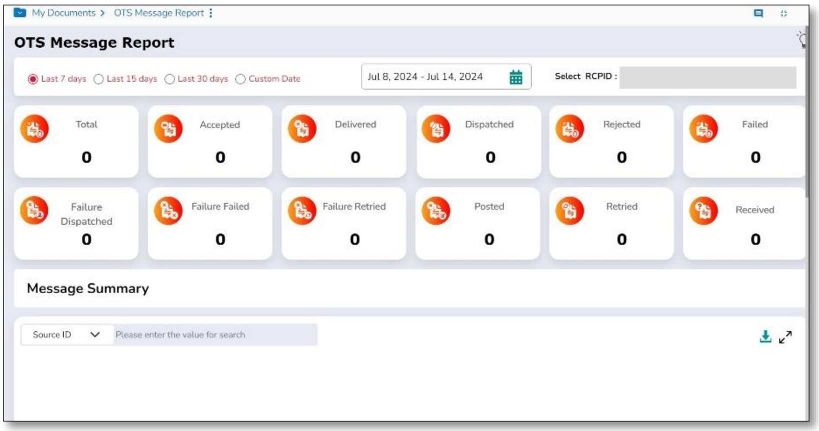


You will be redirected to a reporting dashboard. You now have the option to choose which report you would like to view.

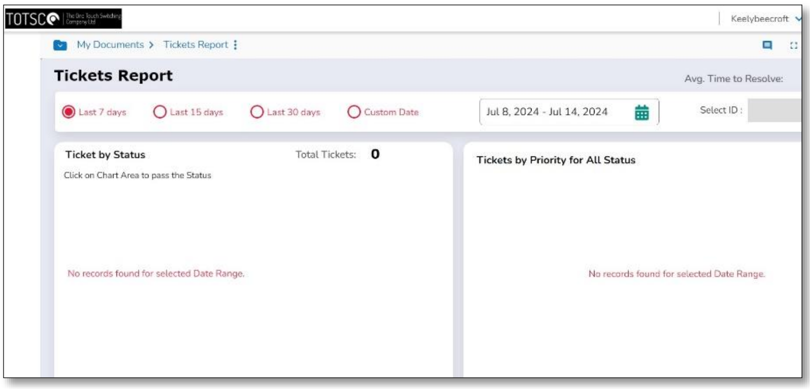


The message report displays all the messaging you have sent and received in the Production (live) hub.

Data displayed will be up until midnight the previous day.



The ticket report will display all tickets you have raised with their status.

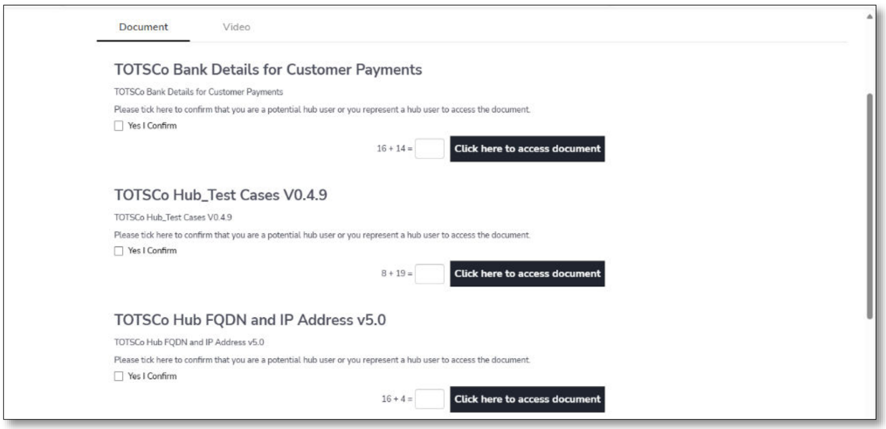


9. Access Network Provider List

This option in the portal will automatically download an Excel list of all the Access Network Providers we have listed.

10. Help – The Document Centre

For data and privacy purposes some of our documents are hosted in this secure area, rather than on our public website.



Need help? If you have any questions please contact us on service_desk@totsco.org.uk. We are here to help.