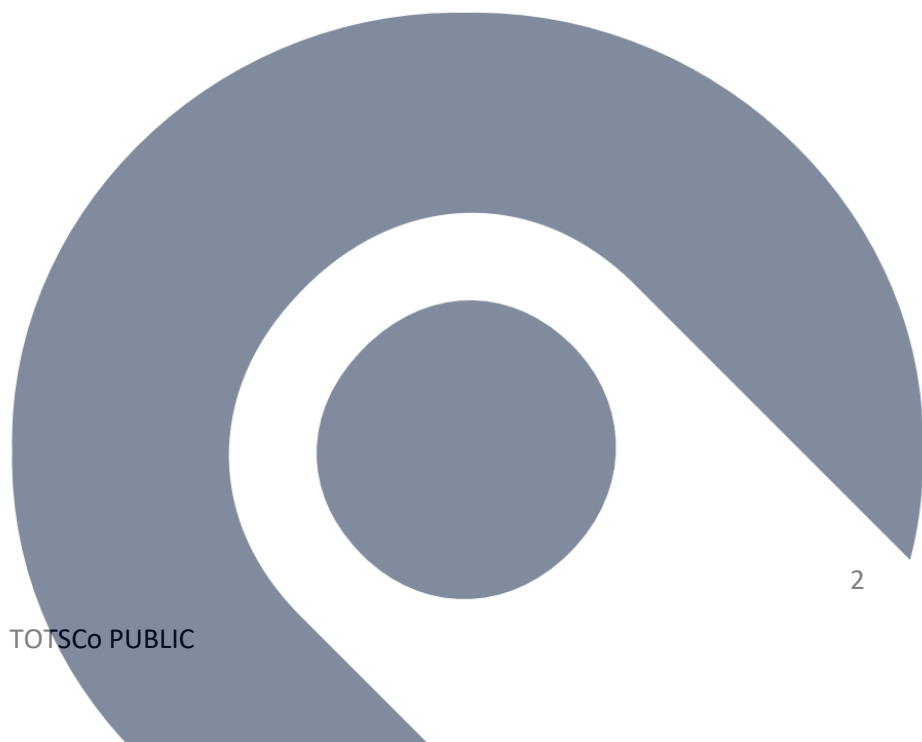




ACCOUNT MANAGEMENT PORTAL HOW-TO GUIDE



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.....

- **Initial Onboarding**
- **Commercial Onboarding**
- **Managing Your Account:**
 1. **User Agreement**
 2. **ACL & Letterbox**
 3. **Brands**
 4. **Contacts**
 5. **Tickets**
 - now includes the ‘Interim CP-to-CP Communication Support Service’
 6. **Bills**
 7. **Merger and Acquisition**
 8. **Outage Calendar**
 9. **Reports**
 10. **Access Network Provider List**
 11. **Document Centre**

NEW

NEW

NEW

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.

TOTSCo The One Touch Switching Company Ltd

Company Registration

Contact Person Name* Contact Email*

Password* Confirm Password*

Registered Company Name* Contact Person Number*

(Name as shown on Companies House register)

Country*

Note: A verification link will be sent to your email address.
We value your privacy. Our full privacy policy is available here: <https://totsco.org.uk/privacy-policy/>

SUBMIT

Already have an account? Sign in



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

- Contact Person Name** – this person should be authorised to apply for this service within the organisation.
- Contact Email** – This will be your username. It should be a business email address.
- 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 #!@&*!
- Confirm Password** - Re-enter the password for future login.
- 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.
- Contact Person Number** – contact number for the person registering.
- 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.

The screenshot shows the 'COMMERCIAL ONBOARDING FORM' in the OTS Hub. The form is titled 'Welcome to OTS Hub' and includes a 'BASIC DETAILS' section. The fields are as follows:

- Registered Company Name* (A/N Other Ltd)
- Contact Email* (redacted)
- Contact Person Name* (A/N Other)
- Contact Person Number* (0121224567)
- Position* (empty)
- Registered Company Number* (empty)
- VAT Number* (empty)
- Billing Preference* (Select Billing Preference dropdown)

At the bottom, there is a toggle for 'Do you have authorisation to register with TOTSCo on behalf of the company?' with 'No' selected.

SECTION ONE – COMMERCIAL ONBOARDING FORM

You will initially be asked for the following basic information:

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

The next section is the address section:

- Country** - this will be pre-populated from your initial Onboarding. The TOTSCo Hub is only applicable to UK and Irish retailers.
- Registered Company Address** - Enter the registered Company Address as appears on the Company House register.
- 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 2024** - 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.

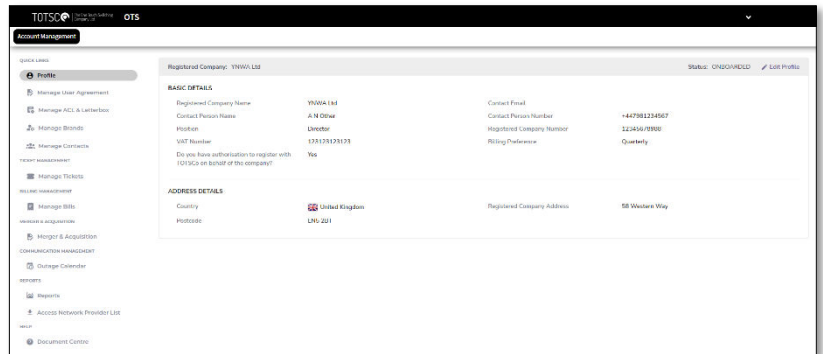
In the Account Management Portal you can manage the following:

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

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

1. Manage User Agreement

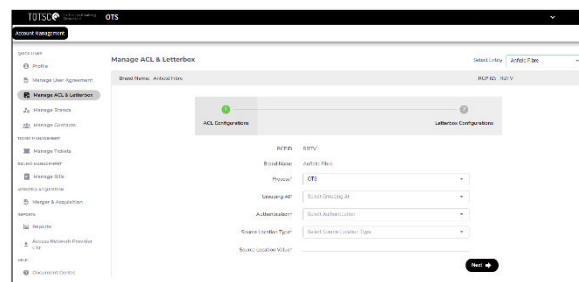
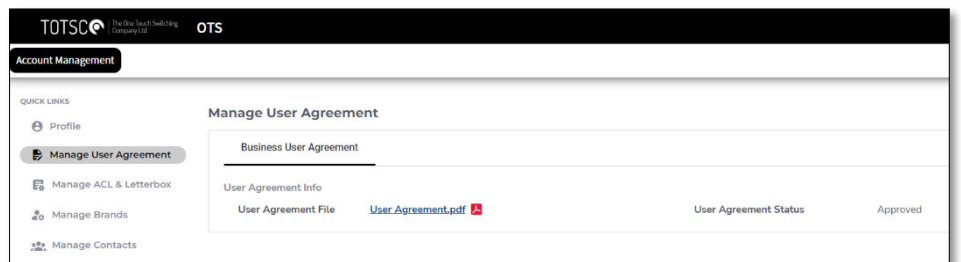
In this section you can check the status, view and download your User Agreement.



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 view, add and manage your brand/s that are part of your organisation. You will also see any actions that are required.

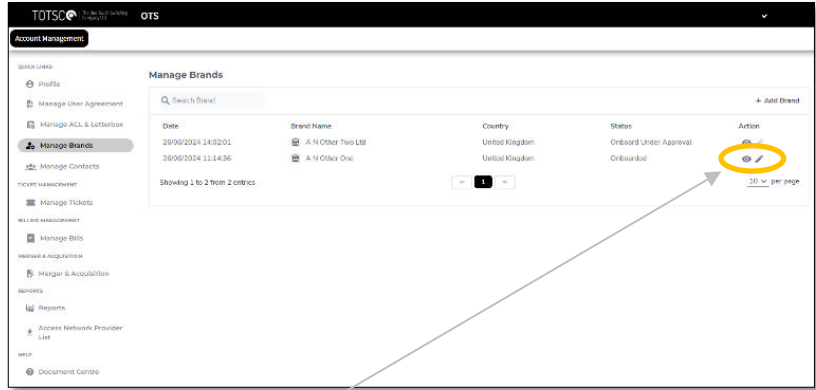
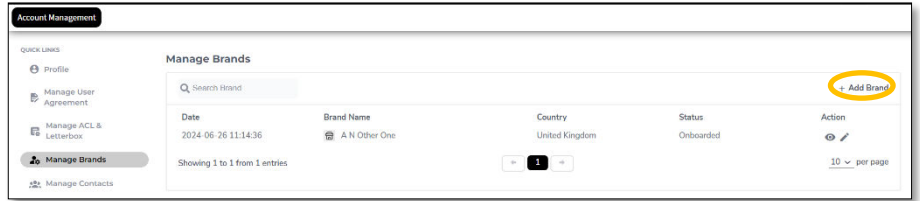
To add a brand, click on 'Add Brand' on the right side of the screen. The 'Add Brand' screen will now appear. Enter relevant details for the new brand.

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.

In Manage Brands it's here you add your customer numbers as of 30 June 2024 when required. Simply, click on the pencil of the brand you would like to add the customer numbers to. You can then enter your customer numbers in the following box.



What was your total number of residential customers on 30th June 2024?



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

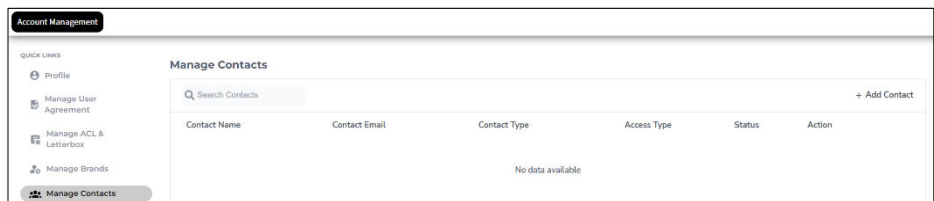
4. Manage Contacts

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.



Add Contact

Contact Person Name*

Contact Email*

Contact Type*

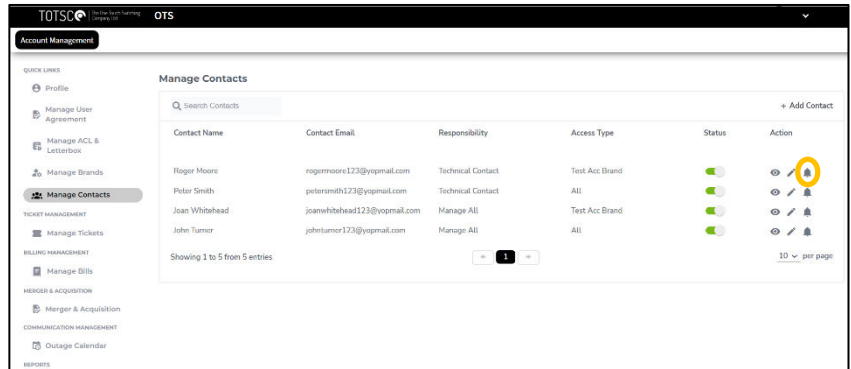
Access For*

Country*



Notifications

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'.

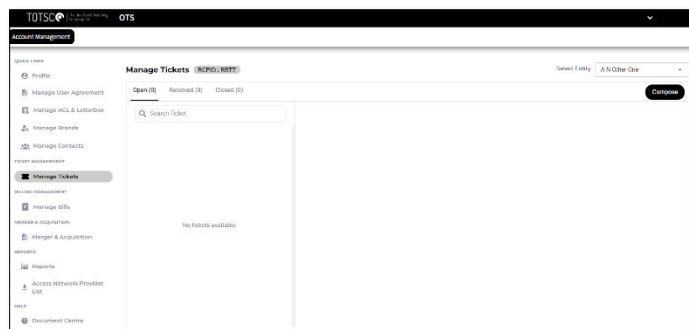
You will be asked to complete the following fields:

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.



Interim CP-to-CP Communication Support



As per Bulletin 71, this process has been put in place on a temporary basis to support user communications until the [CP-to-CP Communication tool](#) is fully adopted. **This process should only be used if you have found that a CP you are contacting is NOT registered on the CP-to-CP tool.**

Please note – If the CP you are trying to contact is on the CP-to-CP tool we refer you back to the tool to make contact.

The first step is to raise a ticket by following the steps outlined above and selecting "General Enquiry" as the ticket type.

In the subject field, please enter "CP-to-CP Communications" - this is essential to ensure your ticket is directed to the correct team. In the 'Ticket Description' field, provide a clear description of the issue.

The service desk will review your issue and if they cannot resolve it, we will forward the issue to the user you have requested contact with.

The Service Desk will send the following email to the user you have requested contact with.

We will send the email to the **Technical Contact** and if unavailable the main **Administrative Contact** will be contacted.

Follow-up Attempts: If the destination user does not respond within 24 hours, TOTSCo will make up to three additional attempts to contact them, allowing 24 hours between each attempt.

No Response: If no response is received after the Final attempt, the Service Desk will send the Following message to the Requesting User.

Subject: CP to CP Communications Request

Dear [Destination User],

[Requesting User] has tried to reach you via the CP-to-CP Communications Tool but was unable to find you. They have an issue they would like to discuss. Please find the details below:

[Description here]

Could you please confirm whether we can share your business email address with [Requesting User], or provide alternative contact details.

Kind regards,

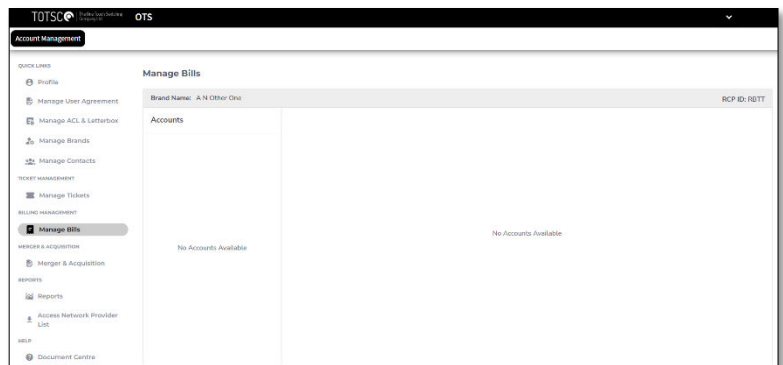
Dear [Requesting User],

Unfortunately, we have not received a response from [Destination User] despite multiple attempts. Please consider using alternative methods to contact them.

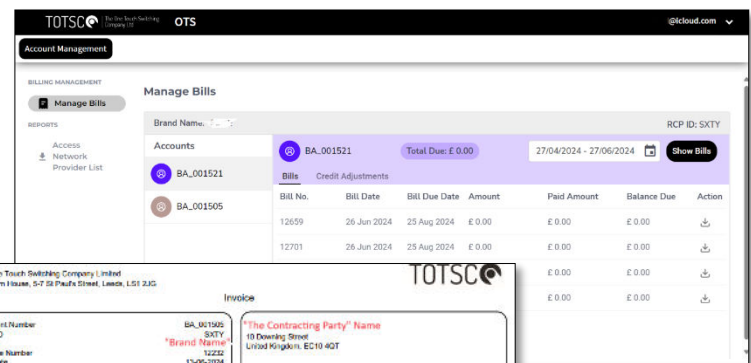
Kind regards,
[TOTSCo Service Desk]

6. Manage Bills

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

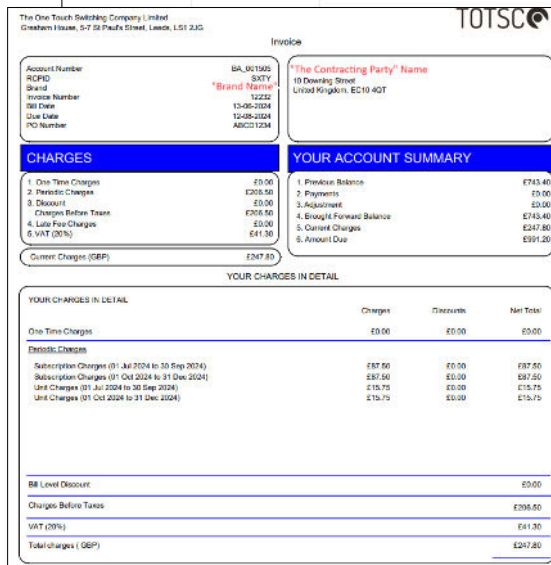


If you have multiple brands, you can view payments and invoices all in one place if you have the required access to view all. If you only have single brand access, you will be able to view your brand payments and invoices here.



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.



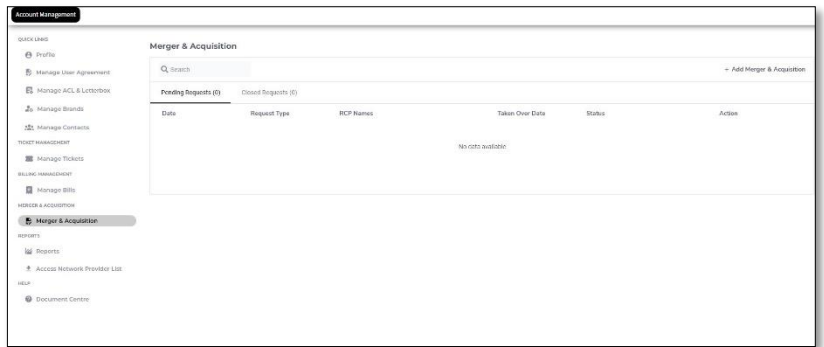
Please ensure that you have enabled notifications (refer to Manage Contacts) to ensure that your nominated finance contact receives all finance-related communications, including notifications when your bill is ready.



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

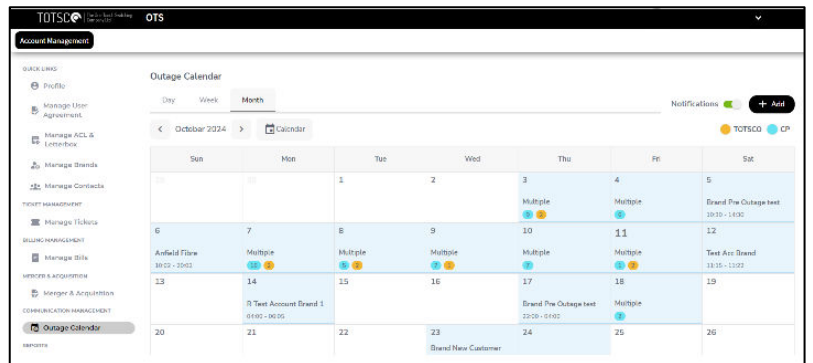
If your organisation goes through a merger or acquisition, here you can add the details. All you need to do is click on 'Add Merger & Acquisition' and then the information screen will appear asking for all the relevant information.



8. Outage Calendar

The outage calendar in the Account Management Portal allows hub users, including TOTSCo, to track both planned and unplanned changes. Once changes are recorded, notifications are automatically sent to all hub users, ensuring timely updates.

Please note that while the Outage Calendar has been designed to resemble the familiar look and feel of a conventional Outlook Calendar, it does not include the same functionality.



What to log in the Outage Calendar

Unplanned Outages and Incidents

A **CP Unplanned Outage** is an unexpected interruption of service that occurs without prior notice. These outages can be caused by unforeseen technical issues, hardware failures, network disruptions, or external events such as natural disasters. Unplanned outages require immediate attention and coordination between CPs and other stakeholders to identify the cause, implement a resolution, and restore services as quickly as possible to minimise disruption.

Incidents Management (P1&P2)

These are high-priority incidents that impact service availability. P1 incidents typically require immediate resolution, while P2 may involve less urgent but still important cases. Both need to be reported to ensure the coordination necessary to resolve and log any actions taken.

Planned Change/Schedule Change or Maintenance Change

A **CP Planned Change** refers to a scheduled interruption of service that is pre-arranged and communicated in advance. These outages are typically necessary for routine maintenance, system upgrades, or infrastructure changes that require temporarily taking services offline.

Key Functionality Highlights

- TOTSCo Updates will be coloured coded in amber and User outages will be in turquoise, shown below.



- You can view the calendar by day, week or month.
- Outages can be entered for a minimum 5 minutes and maximum 12 hours.

Notifications

The following users will get User Outage Notifications:

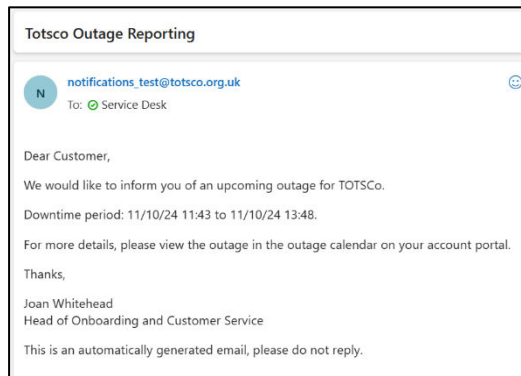
- Main Administrator
- Users assigned Responsibility 'Manage All'
- Users assigned as 'Technical Contact'

Receiving TOTSCo outages is mandatory.

An example email notification is displayed opposite.

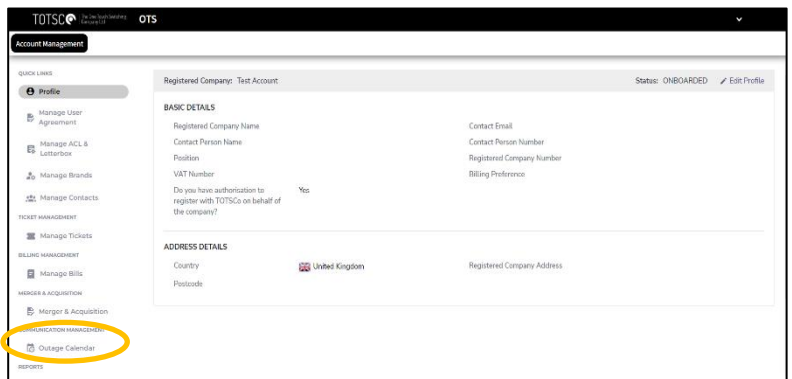


See section 4 'Manage Contacts' page 8 & 9 which will show you how to add contacts and manage your notifications.



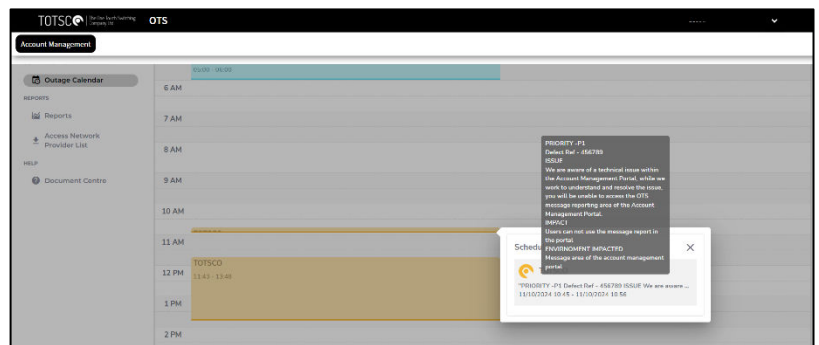
Accessing the calendar

To access the calendar, click on 'outage calendar' in the menu bar.



Viewing an outage

Once you have clicked on the outage you wish to view, to see more information just hover over the outage description and an information box will pop up.



Adding an outage

Click +Add to create your Outage notification.

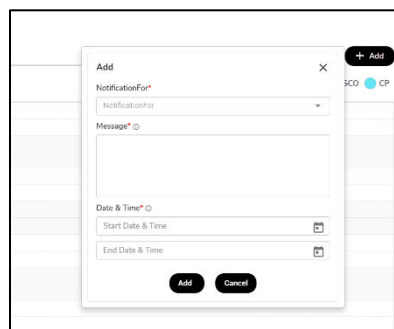
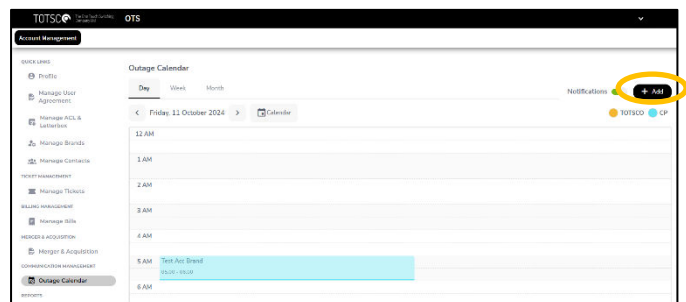
A new notification box will open.

The 'Notification For' drop down displays the brand you wish to register the Outage for.

In the message box you enter the outage information as described above. This is limited to 500 characters.

Finally enter the Start and End times as appropriate. Outages can be entered for a minimum 5 minutes and maximum 12 hours.

Once you click on Add, the Outage will be created and notifications will go out to all CPs who have opted in to receive notifications (see above).



Guidelines for adding a planned change or an unplanned outage or incident

Unplanned outage or incident

- There are two ways you can entering an outage or incident.
 1. Enter multiple shorter outages for each update, starting with an initial 30minute outage. When the issue becomes clearer a new outage can be entered. *This is our recommended method.*
 2. Enter one outage for a longer duration and then update the outage as when needed. Please be advised that any update will permanently overwrite any information that was there previously.

Both options will cause CPs to receive outages notifications.

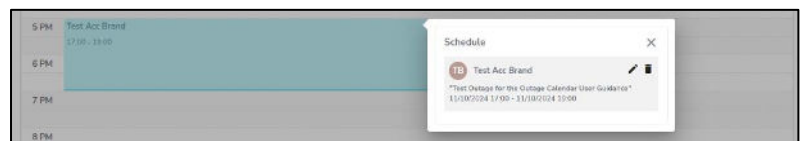
- The information you need to include is as follows:
 - Incident Number & Start time/date
 - RCPID/Brand reporting the incident
 - Operational and technical Impact
 - Time of next update
- For subsequent updates (recommendation is 2 – 4 hours)
 - Time of update
 - Progress on restoration and estimated restoration time
 - Time of next Update

Planned outage

- Users can notify others of an upcoming planned outage up to six months in advance where there is an impact to other providers matching.
- The body of the outage should include:
 - Start time/date
 - RCPID/Brand
 - Relevant Outage Information
 - Expected End time/date

Updating an outage or incident

Go to the Outage in question and click on the pencil icon. You can then edit it as you wish. (note this will permanently overwrite any information that was there previously) and notifications will be sent out to all CPs who have opted into receiving the tool.



You can delete an outage by simply clicking on the dustbin icon. A notification will sent out to all CPs who have opted in to receive outage notifications.

This will remove the Outage from the Calendar. No history of the outage is stored.

Note: You cannot delete old outages.

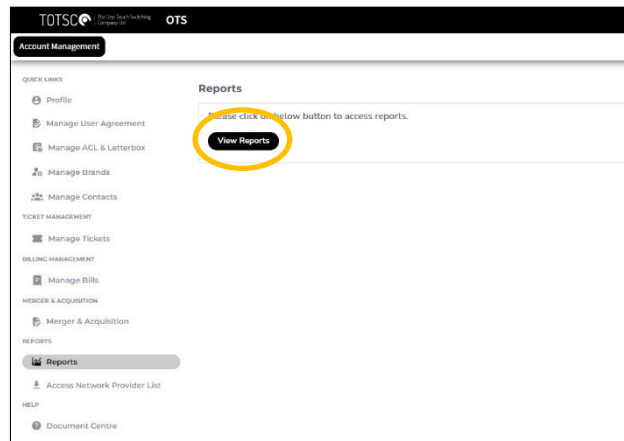
9. Reports

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

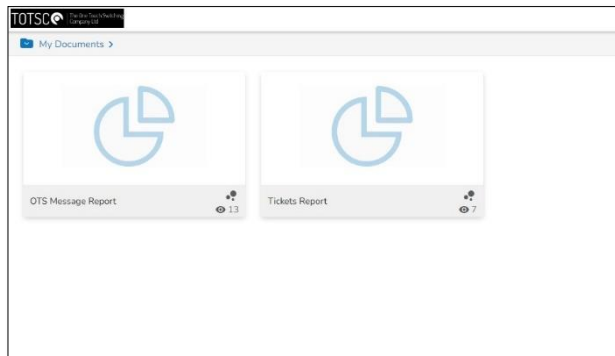
OTS Message Report - shows you the messages you have sent and received in the Production (live) hub.

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.

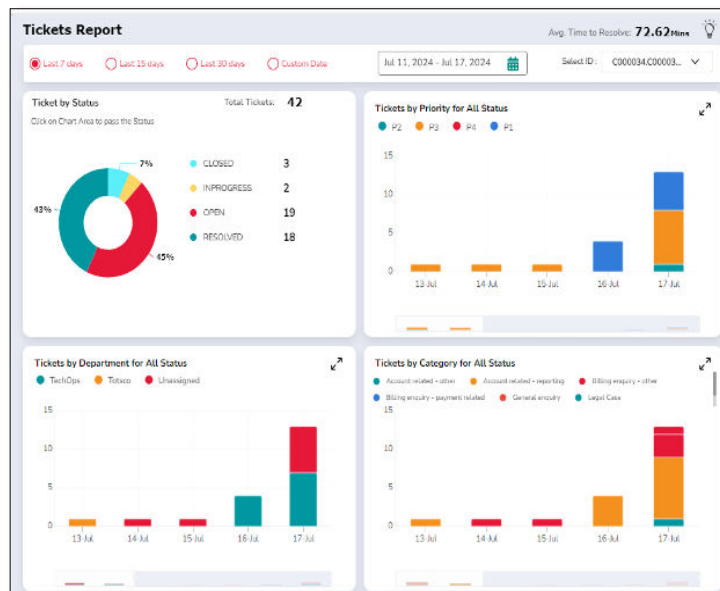


The ticket report will display all tickets you have raised with their status.

An overview of all tickets raised via the portal.

This report provides a breakdown of tickets based on:

- Status
- Priority
- Department
- Category

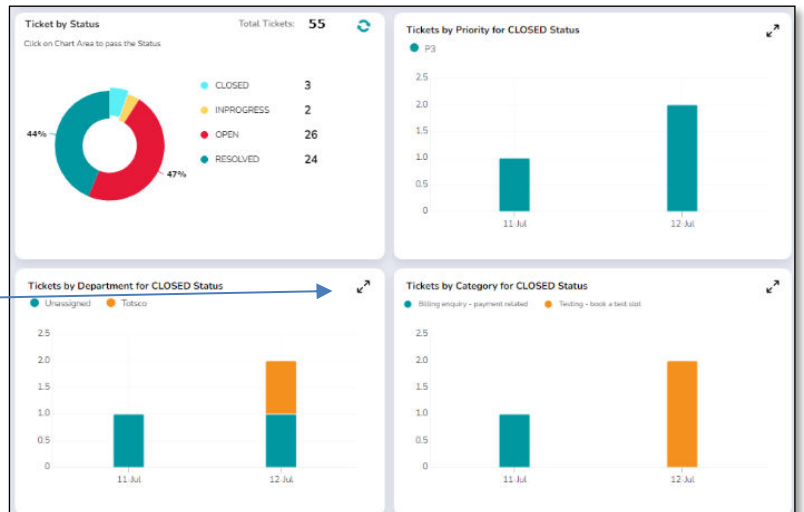


Graphs in the Tickets report are interactive. You could, for e.g., select the “closed” section of the doughnut in the first graph and focus on the details of all closed tickets during the selected date range.

A common feature across all report sections is the ability to toggle between full screen mode. The graphs have a slider to move along the X axis whose width can be adjusted.

Individual graphs can be downloaded as PDF, or the data can be downloaded in Excel.

The detailed report can be downloaded in pdf, excel or csv formats.

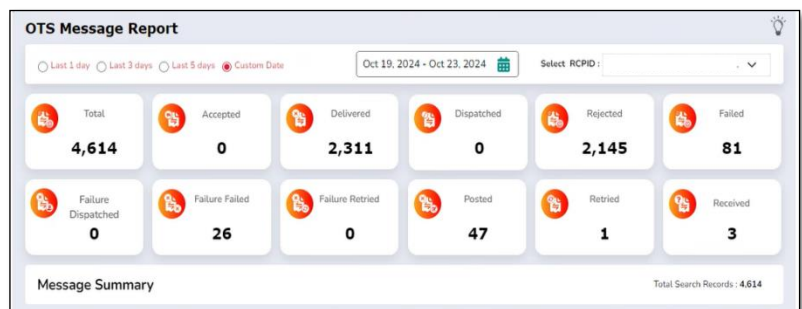


The message report displays all the messaging you have sent and received in the Production (live) hub.

Data displayed will be up until midnight the previous day.

You can generate reports for the past 1, 3, or 5 days. Or choose the custom date range option. **We recommend limiting this to a 7-day range for quicker data retrieval and smoother performance.**

The light bulb at the top right corner provides a quick tour of the report, displaying information about each section of the report.



Both the summary and detail reports can be downloaded as Excel, CSV or PDF. You can filter the information before downloading.

OTS Message Report Fields Descriptions

The table opposite offers detailed explanations for each field in the OTS message report.

Field Name	Description
Accepted	After all business validations, OTS Hub accepted the request.
Delivered	CP sent back the 202 ie CP accepted the request.
Dispatched	After endpoint verification, OTS Hub sent message to the destination Endpoint.
Rejected	If business validation failed then OTS Hub rejected the request
Failed	If CP sent back 400,401,403,404,429,500,501,502,504,511 then Failed status is updated.
Failure Dispatched	OTS Hub sent messageDeliveryFailure to source endpoint after verification.
Failure Failed	If Source CP sent 400,401,403,404 then failureFailed status is updated in tables.
Failure Retried	If Destination CP sent 429\500, OTS Hub will retry, while retrying capture the status as failureRetried.
Posted	Source CP returned 202.
Retried	If Destination CP sent 429\500, OTS Hub will retry, while retrying capture the status as Retried.
Received	Request reached OTS Hub

Message Summary Fields Descriptions

The table opposite offers detailed explanations for each field of the message summary report.

Column Name	Column Description
Source ID	The ID that has sent the message
Destination ID	The ID that is the recipient of the message
Message Instance ID	Message ID in TOTSCo Hub
Source Correlation ID	Source Correlation ID
Destination Correlation ID	Destination Correlation ID
Message Type	Type of message
Status Code	HTTP Response Code that the recipient returned to the Hub – for a Delivered message this will be 202
Status	Current / Latest status of message
Transition Date	Date-time of most recent Status update
Error Code	The code returned to the source ID in the event that the Hub either Rejected the message or Failed to deliver the message
Status Description	A description of the message status. For a Delivered message, this will be “Delivered”. For a Rejected or Failed message, this will contain the text that was returned with the Error Code
Fault Code	Fault code sent back by the Losing CP indicating why a message couldn't be processed by the Losing Communications Provider (CP) and was returned.
Retry Delivered	Number of retry attempts by the Hub before successful delivery to the destination
Retry Failed	Number of retry attempts by the Hub before delivery failed to the destination

Message State Transition Summary

When using the Message State Transitions feature, simply enter the specific Message Instance Number you wish to explore in more detail.

10. Access Network Provider List

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

11. 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@totasco.org.uk. We are here to help.