TOTSCO

The One Touch Switching Company Ltd

# RESIDENTIAL SWITCHING USER GUIDE

*Version 4.0*

*22 December 2025*

# TABLE OF CONTENTS

# VERSION CONTROL

This guide will continue to evolve as we make improvements and respond to feedback. This section tracks any updates, so you can easily see what's changed and when.

| Date of change | Version | What's changed |
|---|---|---|
| 18 July 2025 | V2.0 | • Updated 'Managing Contacts', users can now go in and add the various contacts to your account.<br>• Added Testing Preparation Instructions<br>• Added Basic Testing Steps |
| 10 November 2025 | V3.0 | • Updated details on adding customer numbers |
| 22 December 2025 | V4.0 | • Added CP-to-CP Communication Tool Information |

# Welcome to the TOTSCo Residential Switching User Guide

This guide is here to help you set up and use the TOTSCo Hub for residential switching.

You'll use two parts of our service:

1. **Account Management Portal** – register, onboard, manage your details, sign your User Agreement, add users and brands, view reports, manage billing, and raise support tickets.
2. **TOTSCo Hub** – send and receive switching messages with other providers.

Whether you're doing it all in-house or getting help from a Managed Access Provider (MAP), this guide breaks down what you need to do.

# GETTING STARTED
## WHAT YOU NEED TO KNOW AND DO FIRST

### 1. Choose: Connect Directly or via Managed Access Provider (MAP)


👉 Not sure yet? That's OK — just decide before you start onboarding. **If you decide to use a Full Management MAP, you will onboard with them**. For more information on MAPs – go to the next page.

### 2. Read: Documents you'll need

Here you'll find all the technical, process, and testing documents needed to support the ongoing operation of One Touch Switch.

We've identified a set of essential documents called 'mandatory' that everyone involved in the OTS process must become familiar with.

Additionally, we have a collection of advisory documents, thoughtfully created by industry participants with TOTSCo's facilitation, to offer industry guidance. *It's crucial to note that these documents do not serve as legal or regulatory advice, nor do they bear the endorsement of Ofcom, ICO, or TOTSCo. As a result, they will consistently undergo updates and enhancements, to evolve and better cater to the industry's requirements.*

| **Mandatory Documents** |
|---|
| **Technical Specifications** |
| TOTSCo API Specification |
| OTS Message Specification |
| OTS Response Codes |
| **Process Documents** |
| OTS Industry Process |
| OTS Industry Process Flows |
| OTS Message Delivery Policies |
| **Advisory and Best Practice Documents** |
| There are a large range of advisory documents, created by the OTS Industry Process Group, available on the TOTSCo website. |

👉 All the latest versions of all the documents can be found on our website, here.

# CONNECTING VIA A MANAGED ACCESS PROVIDER

If you'd prefer help connecting to the TOTSCo Hub, you can choose to work with a **Managed Access Provider (MAP)**. MAPs are third-party providers who help manage your technical connection to the Hub. Depending on the MAP you choose, they may support just the connection, or take care of the full switching process on your behalf.

## Three Types of MAP Solutions

Some MAPs offer all types of service, while others offer just one or two. Each MAP can explain what they provide and help you choose the option that's right for you.

### Insourced MAP

You host and operate the MAP platform within your IT environment. In addition to the MAP contract, you'll sign a user agreement with TOTSCo and pay our hub charges directly to us.

### Technical MAP

The MAP hosts the solution. You'll interact with the OTS process via a user interface and sign a user agreement with TOTSCo. In addition to the MAP contract you'll sign a user agreement with TOTSCo and pay our hub charges directly to us.

### Full Management MAP

The MAP handles everything, including billing. You'll only need to contract with the MAP and pay their charges – they will take care of paying us for your use of our hub. Each MAP will offer their own MAP solution.

👉 **If you decide to connect via a Full Management MAP,** you do not need to onboard with TOTSCo directly — your MAP will manage the full setup and testing process with you.

## Comparison of MAP Services

| | Insourced MAP | Technical MAP | Full Management MAP |
|---|---|---|---|
| Platform & Service | ✓ | ✓ | ✓ |
| Contract with MAP | ✓ | ✓ | ✓ |
| User Agreement with TOTSCo | ✓ | ✓ | |
| Billed with MAP | ✓ | ✓ | ✓ |
| Billed with TOTSCo | ✓ | ✓ | |
| Onboarding with TOTSCo | ✓ | ✓ | |
| Onboarding via MAP | | | ✓ |
| MAP provides lead on testing | ✓** | ✓ | ✓ |
| MAP provides first-line support for billing and customer services | | | ✓ |
| TOTSCo provides first-line support for billing and customer services | ✓ | ✓ | |
| MAP provides first-line support for technical issues | ✓ | ✓ | ✓ |
| Reporting on your messages and issues | | | ✓ |

** please check with your MAP if they offer these services

The table will give you an idea of the services offered by each solution. We would highly recommend contacting the MAPs listed on our website to discuss the solutions they offer and what's right for you.

👉 [View TOTSCo Residential MAPs here]()

## ONBOARDING

To onboard for TOTSCo's residential switching solution, the first thing to know is:

**There are two routes.** Choose the one that applies to you:

***New User**

1. **Onboard, creating an account** in our Account Management Portal – see next page
2. **Sign the User Agreement via DocuSign**

**When you receive a countersigned copy of your User Agreement, you can begin testing**

👉 Skip to: Onboarding Steps on the next page.

**Existing User**

1. **Create your new residential brand** – see 'manage brand' on page 11, section 4.

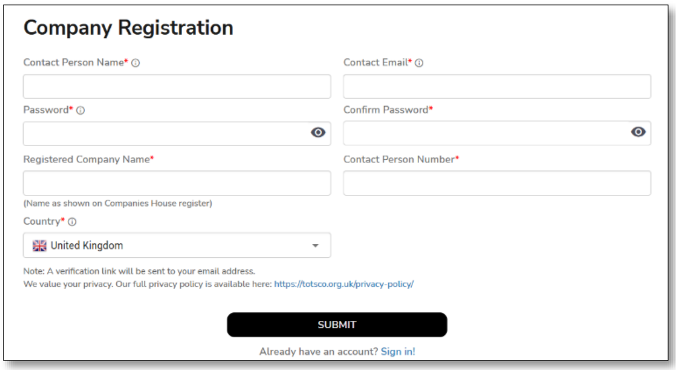
👉 Skip to: Manage Brands page 11.

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

# ONBOARDING STEPS

**Step 1: Company Registration**

1. Go to the TOTSCo homepage and click on '[onboard with us today]'



Company Registration

Contact Person Name*

Contact Email*

Password*

Confirm Password*

Registered Company Name*

Contact Person Number*

(Name as shown on Companies House register)

Country*

United Kingdom

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!

**Complete the following:**

- *Contact name – main account holder
- Company name - as registered with Companies House
- Business email
- Password
- Contact Number
- Country - your business is registered in

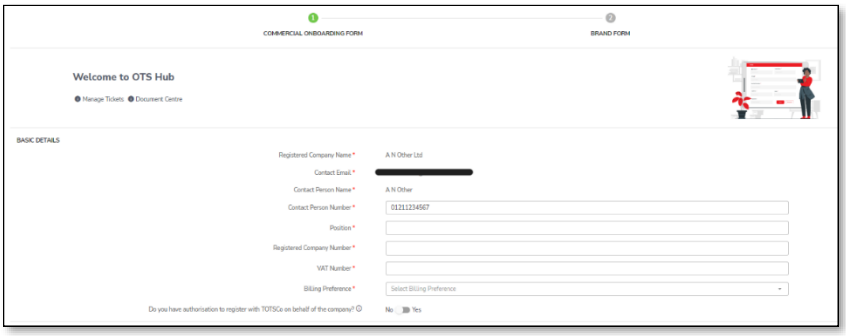
**Once you hit submit:**

- You'll get a verification email – you must click the link in that email to continue
- The link expires after 10 days. If it has expired, reply to the email and we'll send you a new one
- Didn't receive it? Check your junk folder or email: service_desk@totsco.org.uk

*The person who registers will become the main account holder — so make sure it's someone with the right authority. They'll have access to your organisation's sensitive information and be responsible for managing your account.

## Step 2: Commercial Onboarding

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.



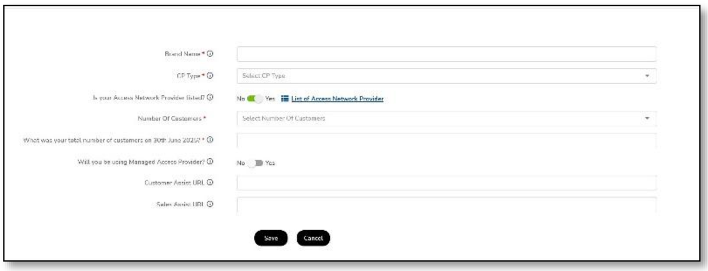

### Section one – Commercial information

**Provide the following:**

- Your position
- Registered company number
- VAT number
- *** Billing preference (annual or quarterly)**
- Confirmation you have authorisation to register with TOTSCo on behalf of the company
- Country your company is registered in
- Registered Company Address
- Postcode

### Section two – Add your brand

This is how your brand will appear in the Hub directory, so use the name your customers will see on their bills. You can include any previous or alternate names, in brackets to help with recognition.




**Provide the following:**

- Brand name
- Access Network Provider name
- Number of customers, as on 30 June 2025
- 👉 ****Let us know if you will be using a Managed Access Provider (MAP)**
- Add your Customer Assist and Sales URL

👉 **For a detailed step-by-step guide on how to add your brand, see Section 3, Page 11.**

Once approved, you need to log in and click “send” in the Manage User Agreement tab to receive your User Agreement. These are legal agreements for using our services, so make sure they’re read carefully and signed by someone authorised in your organisation.

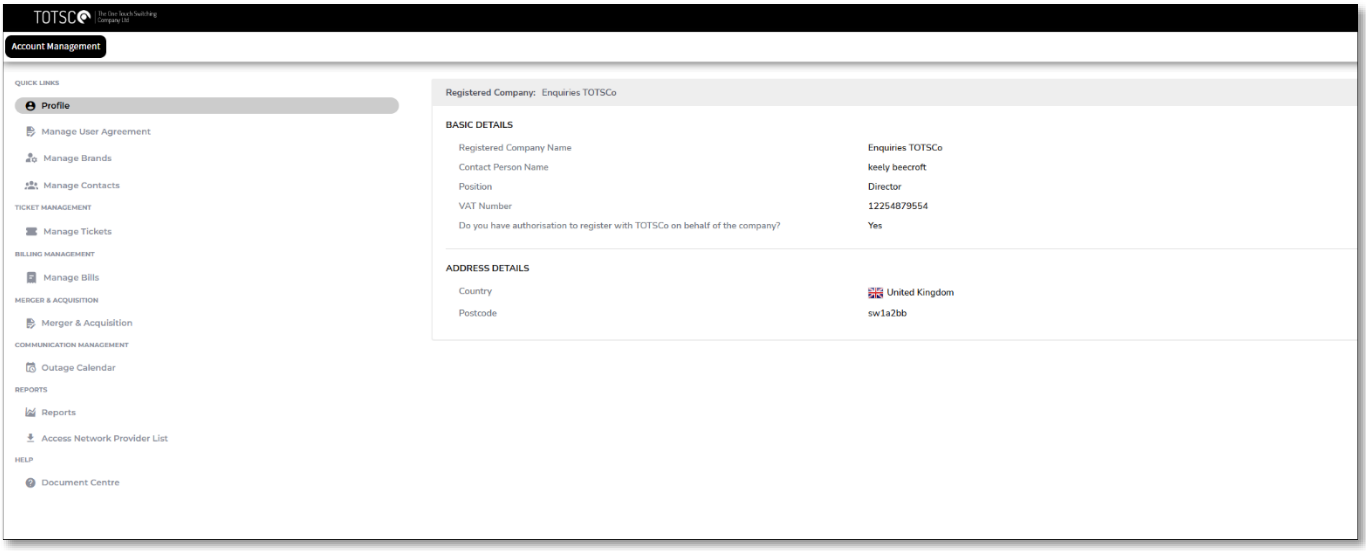
You will receive a confirmation email and your **RCPID** — your unique identifier for testing and live operation.

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

> *There is discount for annual invoicing, please see our price list for more information.
> ** You do not need to onboard with us if you are going to use a Full Management MAP, you onboard with your MAP.

# USING THE ACCOUNT MANAGEMENT PORTAL

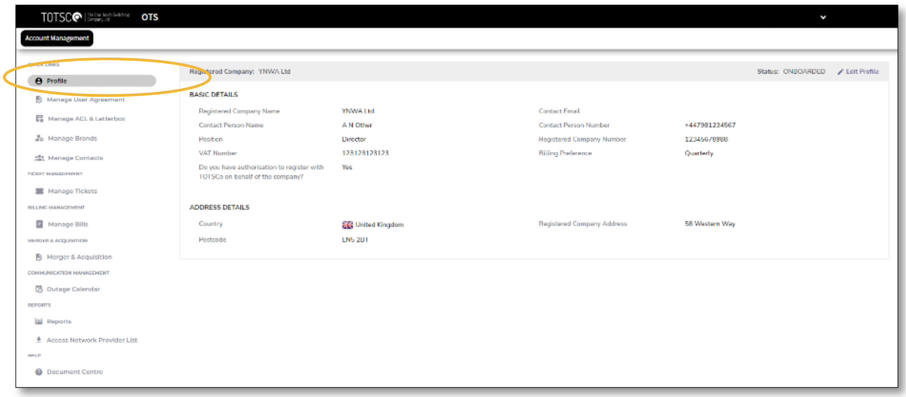
Once you've signed the User Agreement, you'll get access to the Account Management Portal. This is where you can manage your account details, raise a ticket and view your invoices and usage reports.




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

## 1. Profile

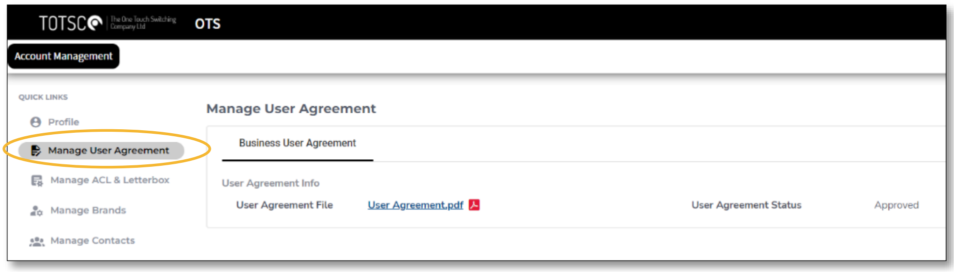
Your profile contains all the information for the main account holder.



## 2. Manage User Agreement

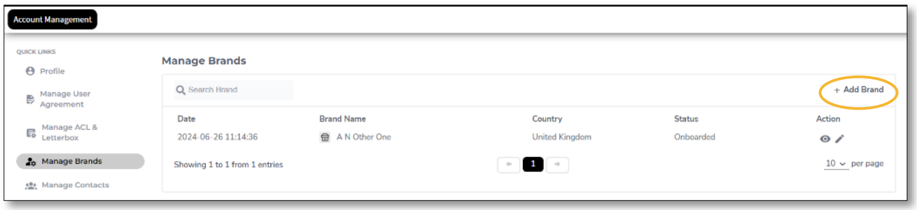
You will gain full functionality of the portal when the User Agreement has been countersigned and uploaded into your account.

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



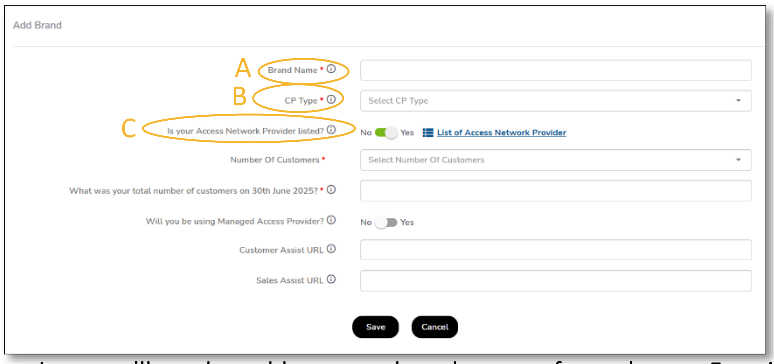

## 3. Manage Brands

To add a brand, click on 'Add Brand' on the right side of the screen.




**A. Brand Name:** This is your brand which will appear in the Hub directory, so use the name your customers will see on their bills.

**B. CP Type:** You'll need to choose either **Residential or Business** — from the dropdown menu.



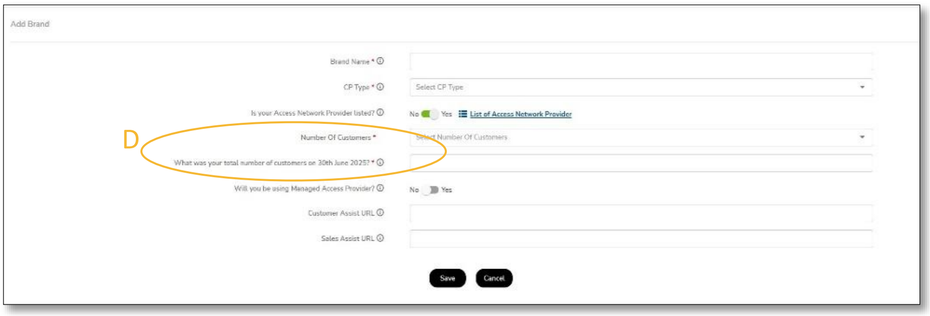

If you offer both residential and business services, you'll need to add separate brands — one for each type. Even if the name is the same, each will be assigned its own RCPID.

It allows for separate billing, reporting, and contact points for residential and business switching.

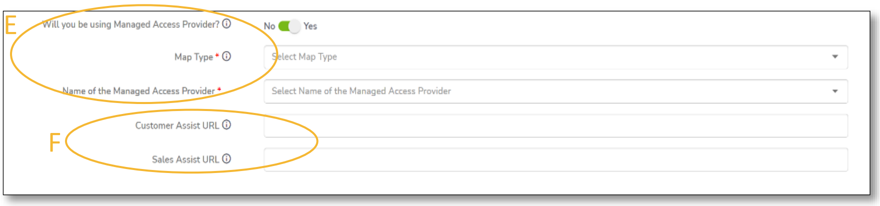
**C. Access Network Provider**:
If yours is not listed, please add it in the drop-down box.

*Why?* When a losing provider sends a match confirmation message, they will include the ACPID that the customers' services are currently on. This provides the information that the gaining provider needs to know in order to treat a potential switch as an intra or inter network journey.

**D. Number of Customers:**
Please enter number of customers you had as of June 2025. It is not possible to enter '0'. If you have zero customers please enter '1' in this field.




**E. Will you be using Managed Access Provider (MAP)?:** If you are planning to use a 'Fully Managed MAP' you will onboard with your MAP. Otherwise please insert your MAP provider here. See section, 'Connecting via a Managed Access Provider' page 5.



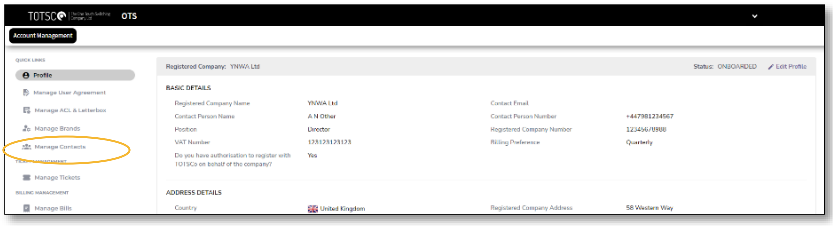

**F. Add your Customer and Sales Assist URLs:**
As part of onboarding with TOTSCo, Communication Providers may provide two URLs for this purpose:

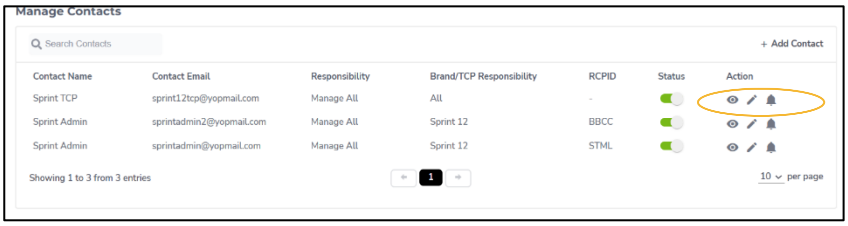
- a page with information to help the customer, suitable for linkage from a self-service customer ordering journey (customerAssistURL).
- a page with information to help a sales advisor working for a GRCP to assist the customer (salesAssistURL).

## 4. Manage Contacts

**The main account holder has full access to manage all areas of your organisation's account.** They can also grant access to colleagues to help manage specific activities, including:

- Manage All
- Manage Tickets
- Billing and invoices
- Technical Contact
- Access to Reports
- Security Contact



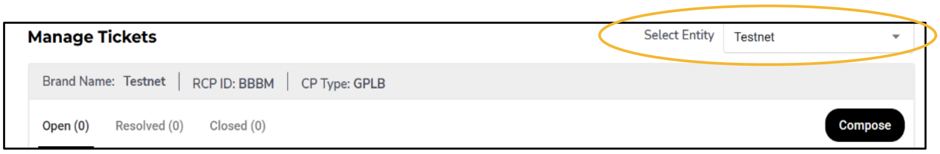

**Notifications**
Make sure you have enabled notifications, by clicking on the bell icon. This will make sure your contacts receive all relevant communications.

If you want to amend any information for any contact, please email the service desk providing the current information and what you would like changed.

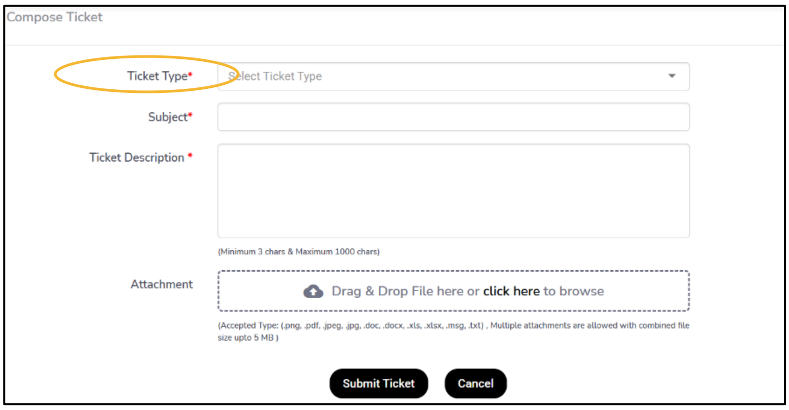
## 5. Manage Tickets

To raise a ticket, first select the brand you're raising it on behalf of (if you have more than one). Click on compose.

Check you have chosen the right brand by checking the RCPID is correct.



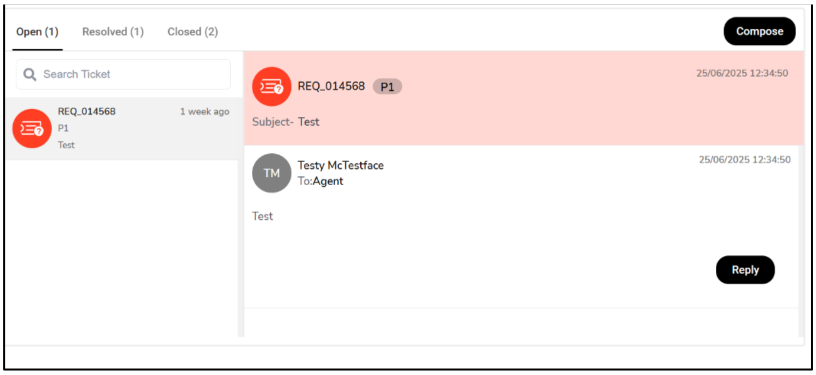

**Ticket Type** - This is a drop down list. Please choose appropriate option that matches your query. **Subject** - Enter a brief subject to describe the query. **Ticket Description** - Please enter as much information as possible about the issue. **Attachment** - Please attach any supporting information.




For some tickets, you'll see a second dropdown asking for the number of end consumers affected. This helps us assess the scale of impact and automatically assign a priority level.

**Please note:** priorities are not fixed and can be altered after review and while the issue is being resolved. See **Schedule D – TOTSCo Service Levels, Support and Fault Reporting** for more details.

Your submitted ticket will be sent to our service desk team and be visible in the open ticket tab



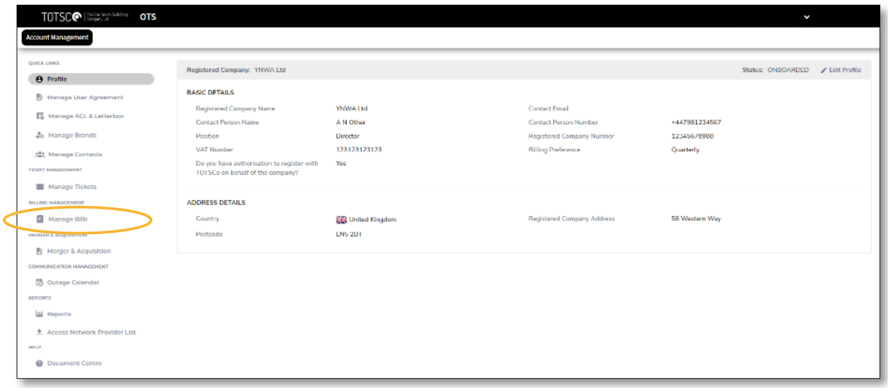

You'll receive an email confirmation once your ticket has been received. When a response is added, you'll be notified by email, and the agent's reply will appear above your original enquiry. While the ticket is open, you can use the 'Reply' button to provide updates, clarifications, or add attachments.

Once you're satisfied that the issue is resolved, the ticket will move to the "Resolved" tab. It will then be closed by the Service Desk and appear in the "Closed" tab. All resolved and closed tickets remain visible in your account, along with a reference number for future use.

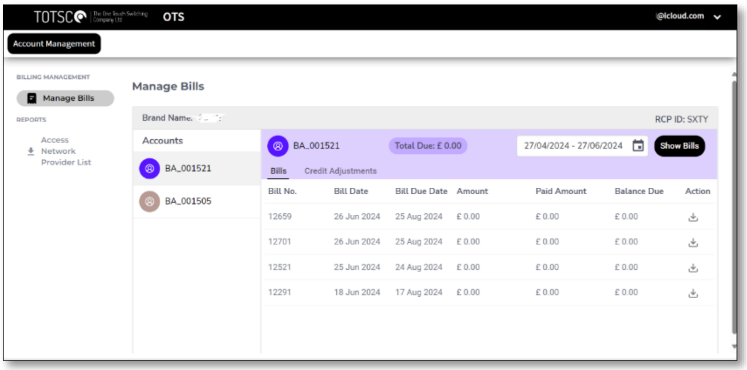
You can also raise tickets by emailing service_desk@totsco.org.uk. However, we recommend using the portal, as it makes it easier for you, and for us, to track and manage your enquiry. Portal tickets also feed into our reporting, helping us improve the service.

## 6. Manage Bills

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

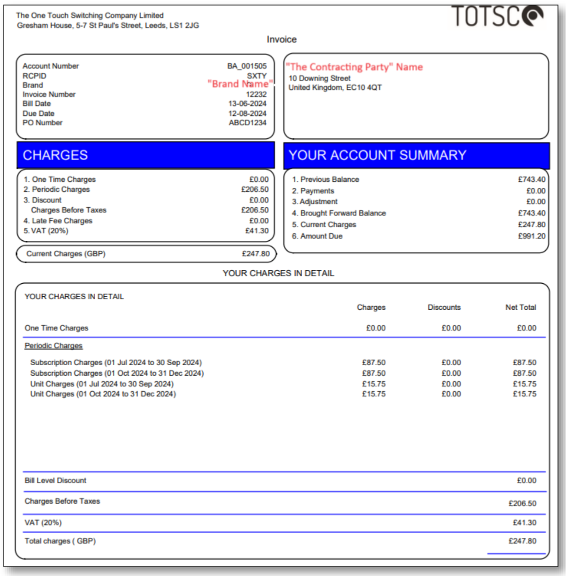



If you have multiple brands, you can view payments and invoices all in one place, if you have the required access to view all. If you only have single brand access, you will be able to view your brand payments and invoices here.




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

TOTSCo

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

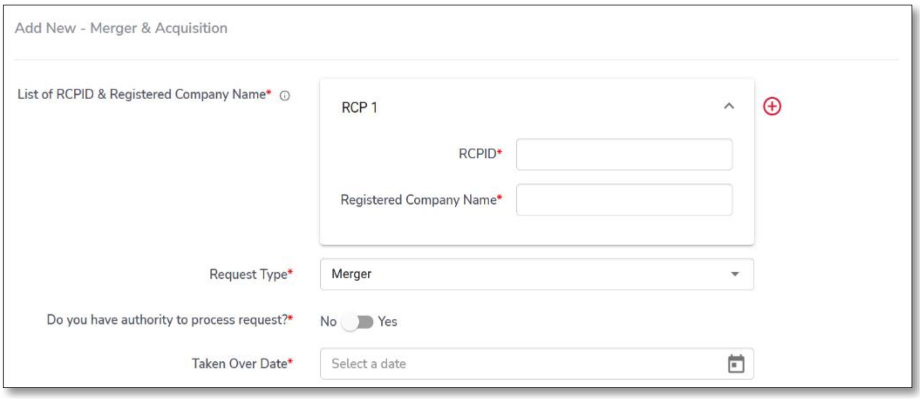
| YOUR CHARGES IN DETAIL | Charges | Discounts | Net Total |
|---|---|---|---|
| One Time Charges | £0.00 | £0.00 | £0.00 |
| Periodic Charges | | | |
| Subscription Charges (01 Jul 2024 to 30 Sep 2024) | £87.50 | £0.00 | £87.50 |
| Subscription Charges (01 Oct 2024 to 31 Dec 2024) | £87.50 | £0.00 | £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

**Please contact us** if your organisation is planning a merger or acquiring a new brand, so we can help ensure switching continues without disruption.
You can notify us of any upcoming mergers or acquisitions using the relevant tab in the Portal.

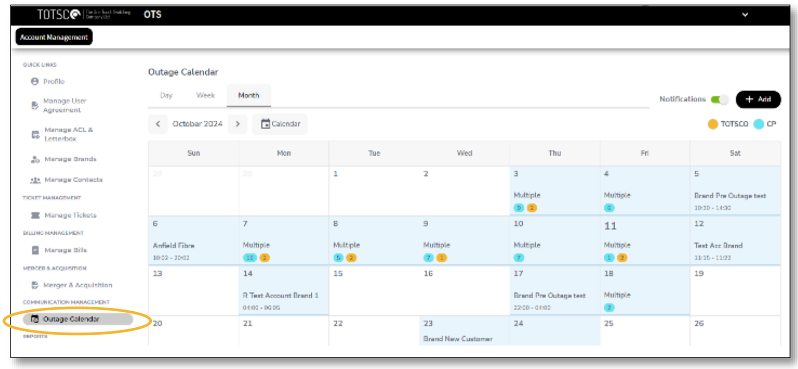



You can list up to 5 brands at a time, if you are acquiring several at once. We request you submit this form as soon as you know the date of the merger or acquisition, preferably 3-6 months prior. We will then reach out to you to discuss the timeline and approach to smooth the transition.

## 8. Outage Calendar

The outage calendar allows hub users, including TOTSCo, to track both planned and unplanned changes. Once changes are recorded, notifications are automatically sent to 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.

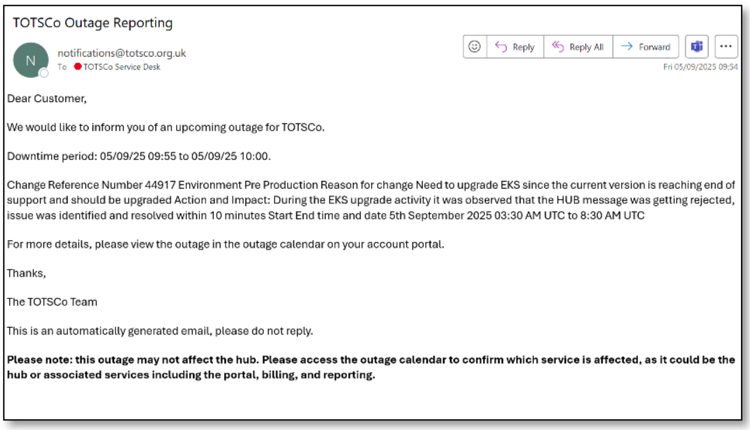

- You can view the calendar by day, week or month.
- Outages can be entered for a minimum 5 minutes and maximum 12 hours.

**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.



TOTSCo Outage Reporting

notifications@totsco.org.uk
To TOTSCo Service Desk
Fri 05/09/2025 09:54

Dear Customer,

We would like to inform you of an upcoming outage for TOTSCo.

Downtime period: 05/09/25 09:55 to 05/09/25 10:00.

Change Reference Number 44917 Environment Pre Production Reason for change Need to upgrade EKS since the current version is reaching end of support and should be upgraded Action and Impact: During the EKS upgrade activity it was observed that the HUB message was getting rejected, issue was identified and resolved within 10 minutes Start End time and date 5th September 2025 03:30 AM UTC to 8:30 AM UTC

For more details, please view the outage in the outage calendar on your account portal.

Thanks,

The TOTSCo Team

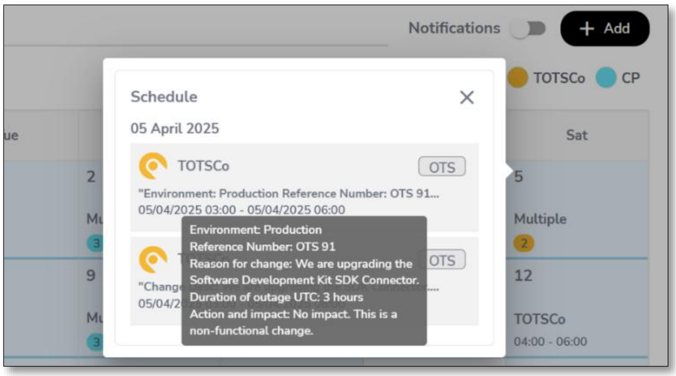
This is an automatically generated email, please do not reply.

**Please note: this outage may not affect the hub. Please access the outage calendar to confirm which service is affected, as it could be the hub or associated services including the portal, billing, and reporting.**

See 'Manage Contacts' page 12 which will show you how to add contacts and manage your notifications.

**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.



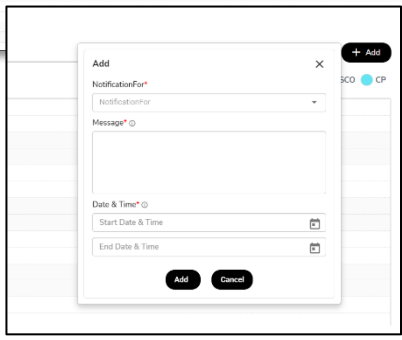

**Adding an outage**

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 enter an outage or incident.
    1. Enter multiple shorter outages for each update, starting with an initial 30 minute 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 outage 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), include the following:
    - Time of update
    - Progress on restoration and estimated restoration time
    - Time of next update

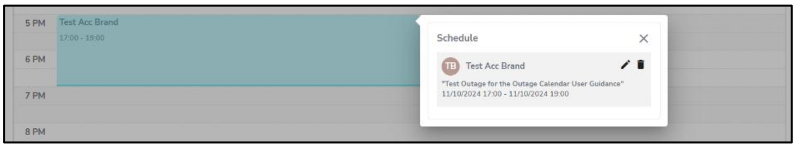
**Planned outage**

- 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.




Please note: this will permanently overwrite any information that was there previously. 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.

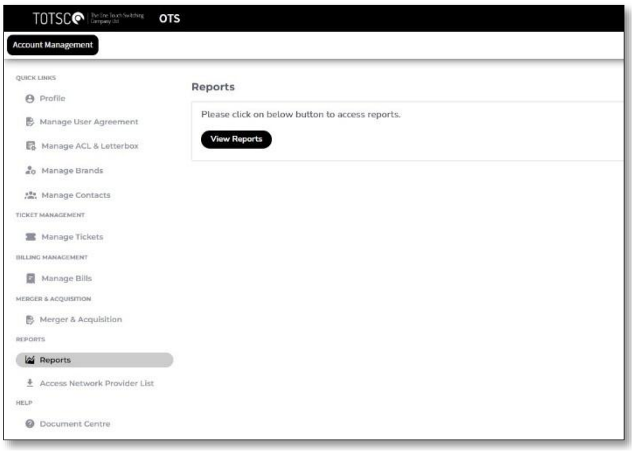
Please note: You cannot delete old outages.

## 9. Reports

Reports that will be available to you, will be:

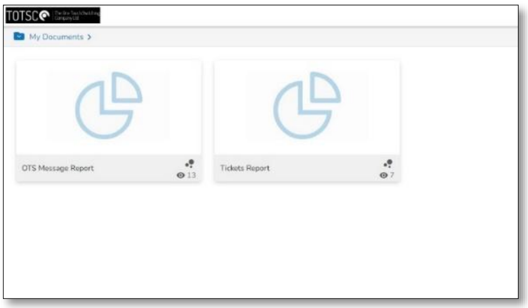
**OTS Message Report** - shows you the messages you have sent and received in the Production (live) hub.

**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.

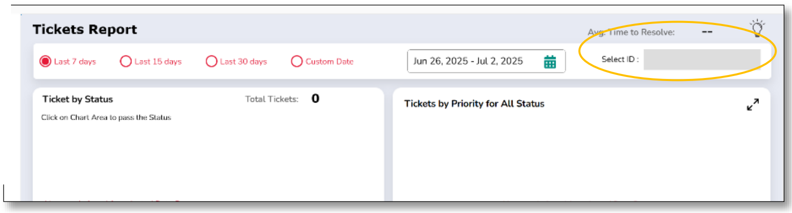



You can access reports by clicking on ‘Reports’, then on ‘View Reports’.

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




If you have more than one brand, choose the brand and the report will display your ticket information.

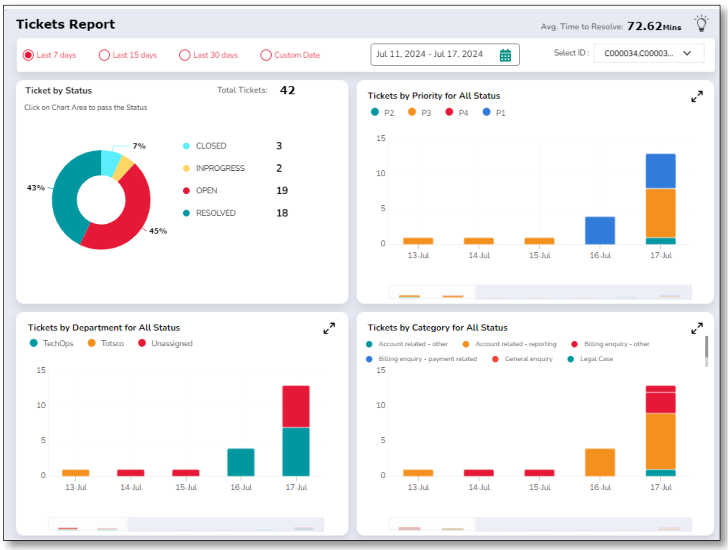



The ticket report will display all tickets you have raised with their status.

An overview of all tickets raised via the portal.

This report provides a breakdown of tickets based on:

- Status
- Priority
- Department
- Category

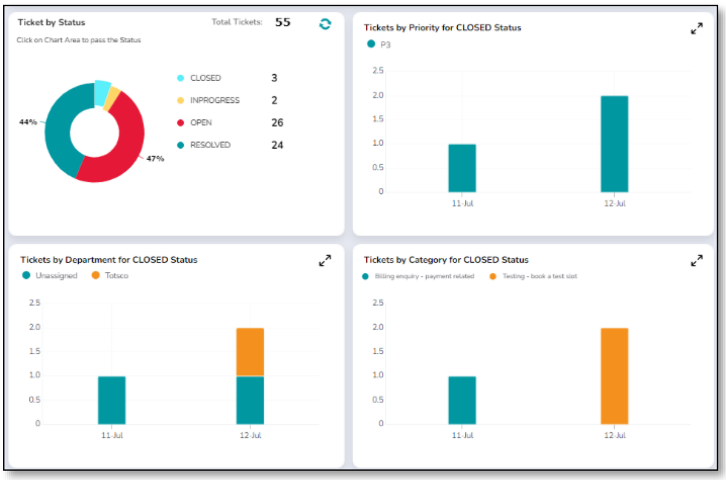


Graphs in the Tickets Report are interactive. You could, for e.g. , select the "closed" section of the doughnut in the first graph, and focus on the details of all closed tickets during the selected date range.

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.

We are currently improving our reporting feature and there will be more reports available for users soon.



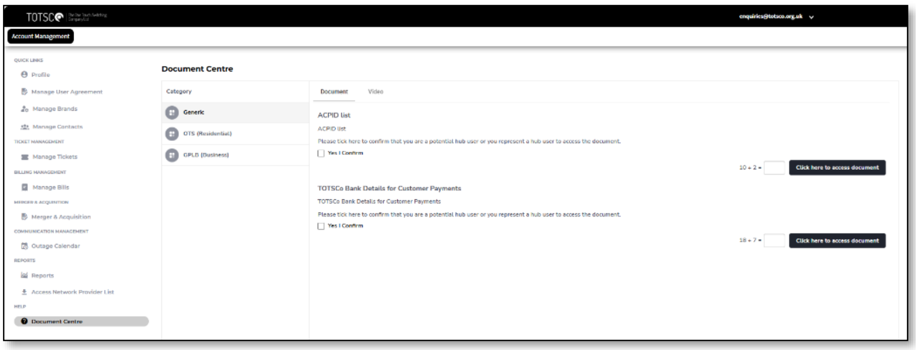

*Individual graphs can be downloaded as PDF, or the data can be downloaded in Excel.*

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

## 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. Document Centre




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

You'll find documents under the following categories:

- Generic information e.g. TOTSCo bank details
- OTS (Residential)
- GPLB (Business)

We'll let you know whenever you need to access anything from this section.

# TESTING APPROACH

Before you can start switching real customers, you'll need to complete testing.
This helps make sure everything is working as it should — for your people, your systems, and your processes.

We'll guide you through each phase. Don't forget **if you're using a Full Management MAP, they'll take care of the testing for you.**

Testing is essential, to ensure a smooth, reliable experience when you go live.

👉 Below is an overview of the testing approach and phases, to help you understand what to expect:


| Testing Phase | Purpose |
|---|---|
| Hub Simulator Testing | Gives you the ability to test connectivity to the hub and to test sending gaining and losing provider messages and receive simulated responses and error messages. |
| Integration Testing | To test the entire One Touch Switch process from end-to end with another CP using test data. |
| Production Implementation Test (PIT) | To validate your connection to the live environment and test basic message functionality to ensure you are ready to go into the live environment. |

## PREPARING FOR TESTING

It's important to start preparing for testing as early as possible — internal approvals and technical setup can take time.

### 1. Whitelist TOTSCo Hub FQDN and IP Addresses

Before testing, you'll need to whitelist our IP addresses and FQDNs — and let us know your IP address so we can do the same for you.

Here's what to do:

- Find the *TOTSCo Hub FQDN and IP Addresses* document in the Manage my Account portal > Document Centre > OTS Residential.
- Send your IP address to the TOTSCo Service Desk so we can whitelist it from our side.

### 2. Choose your security and authentication protocols

Decide which method of authentication and authorisation you'll use to connect to the TOTSCo Hub:

*Transport layer security options:*

- TLS to the signed TOTSCo Hub (default)
- mTLS (mutually signed TOTSCo Hub and CP endpoint)

*Transaction security options:*

- OAuth2 (for inbound, outbound, or both)
- API Keys (for inbound, outbound, or both)
- mTLS alone with no transaction security

#### OAuth2

If you decide to go with an OAuth2, send us the following details:

- Routing ID
- Token URL
- Key
- Secret
- End Point URL

#### API Key

If you decide to go with an API Key, send us the following details:

- API Key
- End Point URL

#### mTLS

If you decide to go with an mTLS, send us the following details:

- mTLS Certificate
- End Point URL

## SIMULATOR TESTING

**Purpose of Simulator Testing**
Gives you the ability to test connectivity to the hub and to test sending gaining and losing provider messages and receive simulated responses and error messages.

**Entry Criteria:**

- Signed the CP/User Agreement *(only applicable to new users).*
- Completed testing prerequisites.

**What You Need:**

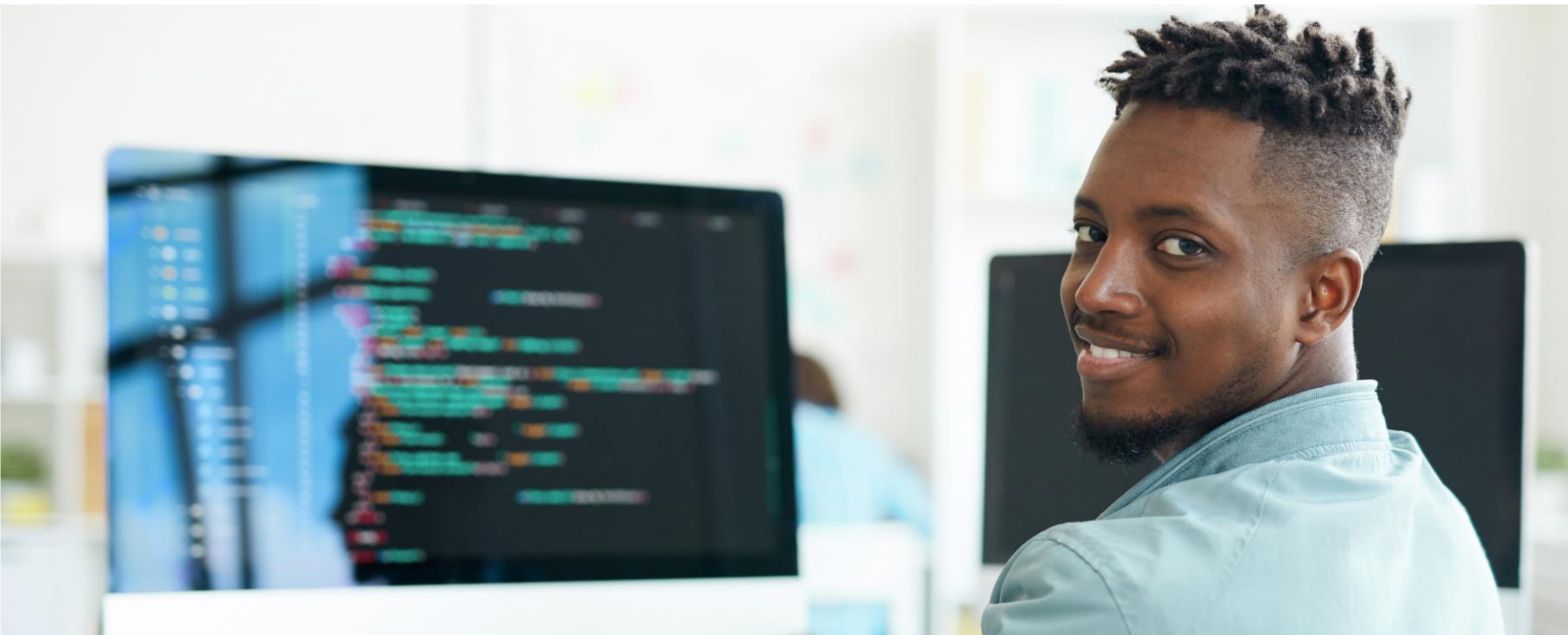
- Test Cases (containing mandatory and optional test cases) – These are available in the document centre, in the Account Management Portal.

**Testing Steps:**

- Request a test slot from the Service Desk – *testing is available 9am – 5pm Monday – Friday excluding weekends and bank holidays.*
- The test slot (2hrs) will be hosted and supported by the Service Desk.
- During the call, you will test the connection to the hub and run the tests cases.

**Exit Criteria:**

- Successful completion of the mandatory test cases are executed.
- No high or critical severity user defects remain.



# INTEGRATION TESTING

**Purpose of Integration Testing**
Allows you to test the entire One Touch Switch process from end-to-end with another CP using your own test data.

**Entry Criteria:**
- Simulator Testing is completed.

**Preparing for Testing**
- Contact the Service Desk when you are ready to start integration testing.
- We will pair you up with another CP (buddy) to complete testing.
- We will set up an introductory call with you and your buddy.
- We will share with you the test scenario document.
- Following the call, you will then decide, with your buddy, your specific tests (in addition to the generic tests in the test scenario document), test data and test schedule.

**Booking a Test Slot**
- Request a three-way testing slot via email to TOTSCo.
- TOTSCo will confirm or propose an alternative slot.
- Accept the Microsoft Teams meeting invite for the testing window.

**Prepare With Your Buddy**
- Select and coordinate with a buddy CP to choose test scenarios.
- Agree on a test plan.
- Decide on the test data to use during the end-to-end tests.

**Steps to Complete Integration Testing**
Once you have successfully connected with your three-way connection, you can now access the integration testing environment independently with your buddy and run your planned tests. It's important to note that while the integration testing environment is available 24/7, technical support is only available during UK business hours (8am-5pm, Mon-Fri).

**Success Criteria**
- **All 15 individual message types successfully sent and received**, utilising the full OTS switch journey for both the gaining provider and the losing provider relevant to each product set. This should include a message delivery failure message from the hub.
- **Conducting extensive testing with your CP partner** – for CPs with 50,000 or more customers, we anticipate over 1000 messages tested with at least two CP partners. For CPs with up to 50,000 customers, around 1000 messages tested with a minimum of one CP partner is expected.
- **Confirmation that you have successfully run all your relevant test cases with a partner.**
- **Confirmation that your integration testing has been performed recently**.
- **Confirmation you have made no internal system changes**.
- **No priority one or priority two defects.**
- **Declaration to be signed** (e-signature or email confirmation)

# PRODUCTION IMPLEMENTATION TESTING

**Purpose of Production Implementation Testing**
To validate your connection to the live environment and test basic message functionality.

**Entry Criteria:**

- Simulator and Integration Testing is completed.

**Preparing for Testing**

- Whitelist all TOTSCo FQDN (fully qualified domain name) and IP addresses.

**Booking a Test Slot**

- Request a testing slot from the Service Desk. A one-hour slot will be more than sufficient.
- The Service Desk will confirm or propose an alternative slot.
- Accept the Microsoft Teams meeting invite for the testing window.

**Success Criteria**

- Confirmation your Production Implementation Testing has been successful.

# MANAGING YOUR LIVE OTS SERVICE

Once you're live on the TOTSCo Hub, this section explains **how to interact with TOTSCo in live operation**, including account management, access to guidance and insight, and support routes.

**1. Managing your TOTSCo account**
Use the Account Management Portal to manage your account, brands, contacts, billing and support tickets.
**2. Supporting guidance and documentation**
Find the latest process and technical documentation, advisory guidance, user agreements and service schedules on the TOTSCo website.
**3. OTS insights and data**
Access your own ticketing and message data via the Account Management Portal. Aggregated OTS Hub insights, including volumes, match rates and message counts, are published on the TOTSCo website.
**4. Resolving issues day-to-day**
Understand when to communicate directly with other CPs and when to contact TOTSCo for support.

## 1. Managing your TOTSCo account

The Account Management Portal is used to manage your organisation's account with TOTSCo, where you can do the following:

- Manage your account details, brands and contacts
- Keep escalation and operational contacts up-to-date
- Raise and track support tickets
- View your User Agreement
- View and manage billing and invoices
- Access operational reporting

Please refer to the section - **using the account management portal** - from page 10 which provides step-by-step instructions for completing all of the activities listed above.

## 2. Supporting guidance and documentation

All documentation to support your use of OTS is available across the TOTSCo website, with different types of information grouped by purpose.

This includes:

- **Process documentation** – explaining how the OTS process works end-to-end.
- **Technical documentation** – covering specifications, interfaces and technical requirements.
- **Advisory documents** – providing guidance, clarifications and best practice.
- **User Agreement** – setting out the terms for using TOTSCo services.
- **Service schedules** – detailing the services provided and how they operate.

Links are provided above to help you navigate to the relevant areas of the website and find the information you need.

## 3. OTS insights and reporting

Access your own operational data, including ticketing information and message activity, through the **Account Management Portal**.

Wider, aggregated OTS Hub insights, such as overall volumes, match rates and message counts, are published on the TOTSCo website, here, to support industry transparency and analysis.

For detailed guidance on accessing your organisation's operational data, please refer to the **Using the Account Management Portal** section, specifically the **Reports** subsection on page 18.

This includes:

- **OTS Message Report** – shows the OTS messages your organisation has sent and received in the Production (live) Hub.
- **Ticket Report** – displays the status and details of support tickets raised via the Portal, broken down by brand. Only tickets raised through the Portal are shown in this report. So, if you email the Service Desk, your tickets will not appear here.

## 4. Resolving issues day-to-day

If you need help or something isn't working as expected, **TOTSCo is available to support you**. The recommended route is to raise a support ticket via the Account Management Portal (see Using the Account Management Portal, *Managing Tickets*, page 13), or contact the TOTSCo Service Desk.

Where an issue relates **directly to another CP as part of the OTS process**, and where appropriate, you may use the **CP-to-CP Communications Tool**.

# USING THE CP-TO-CP COMMUNICATION TOOL

## 1. Overview of using the CP-to-CP Tool

The CP-to-CP Communications Tool is an optional capability provided to support direct communication between CPs and/or MAPs, where appropriate.

- It is **not a contracted service**
- It does **not replace TOTSCo support**
- It does **not create any service obligation or commitment** on the part of TOTSCo

Participation is voluntary. Where CPs choose to opt in, participation is **reciprocal** — CPs must be willing to respond to messages they receive.

To use the tool, CPs must:

- provide relevant contact details

The tool may be used for specific operational reasons only, including:

- trends
- performance issues
- message format issues
- post-switch issues

**Data Protection**

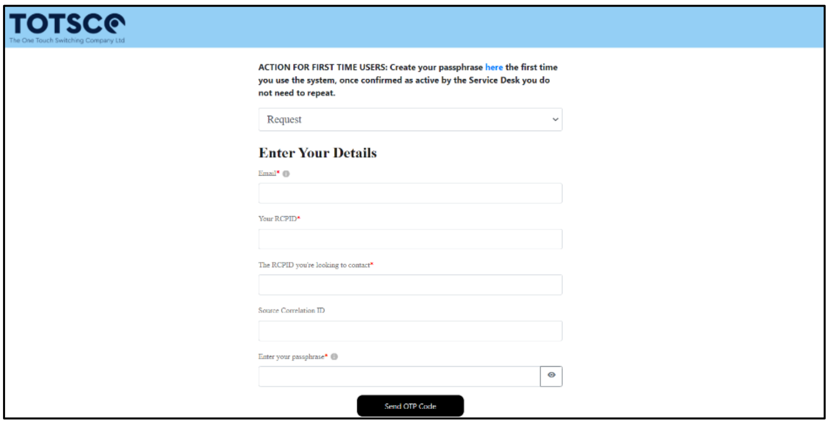
TOTSCo have **no** visibility of any comms content, this is **restricted to** the sender and receiver, the data is created into an email and delivered to the recipient.

No personal customer data will be exchanged in the process and via the tool**.** **T**o enable CPs to identify and triage queries**,** either the SOR or Correlation ID must be provided.

## 2. Step-by-Step guide to using the CP-to-CP Tool

You can access the CP-to-CP tool via our website - https://channel.totsco.co.uk/.

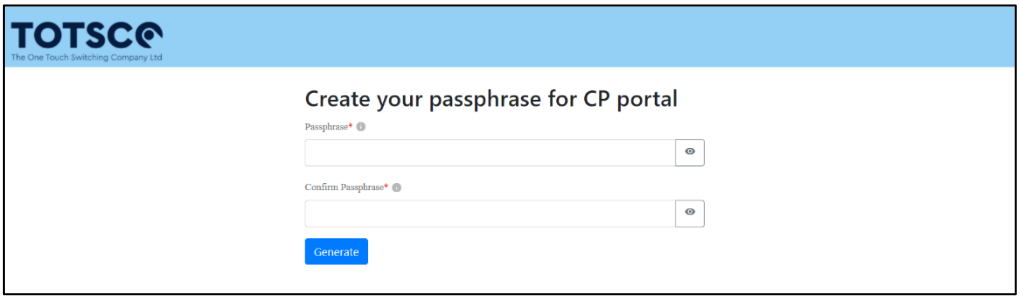
The first step is to obtain your passphrase. This is a one-time only process required to opt in and to start using the tool.




Note: The passphrase is not individual to yourself, but if appropriate, can be shared within your teams that will be using this tool.

At top of the screen click ‘here’, next to ‘Create your passphrase’.

You will be taken to the following screen.

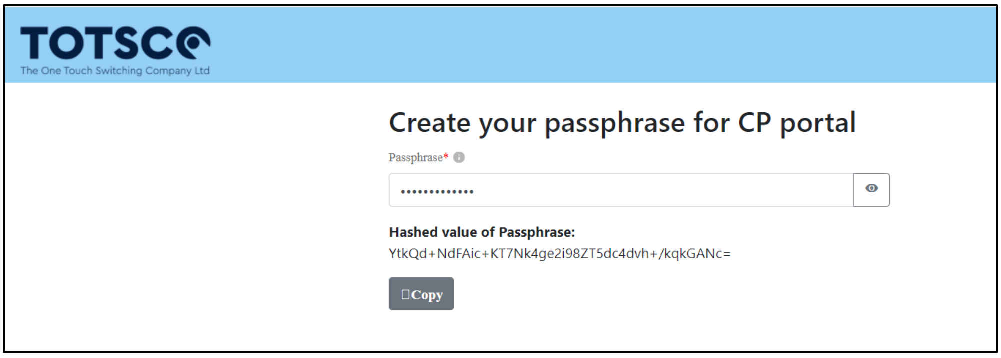



You can enter your passphrase. This should have 12 to 20 characters, with at least 4 alphanumeric characters (underscores and hyphens are allowed).

Re-enter your passphrase exactly in the Confirm Passphrase field. These must match. Then click on the ‘Generate’ button.

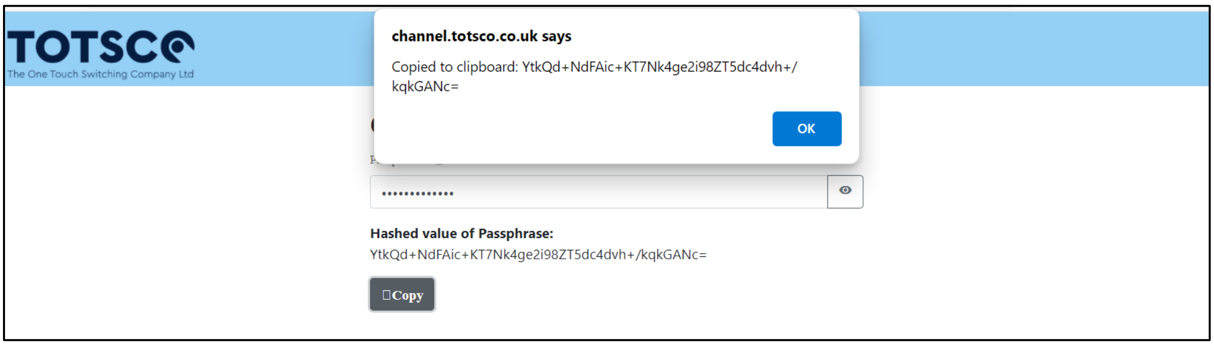
Note: Pressing on the eye button, to the right of the field, will allow you to see what you enter.

You will then see the following screen.



You will be given a hashed value of the Passphrase that you have entered.

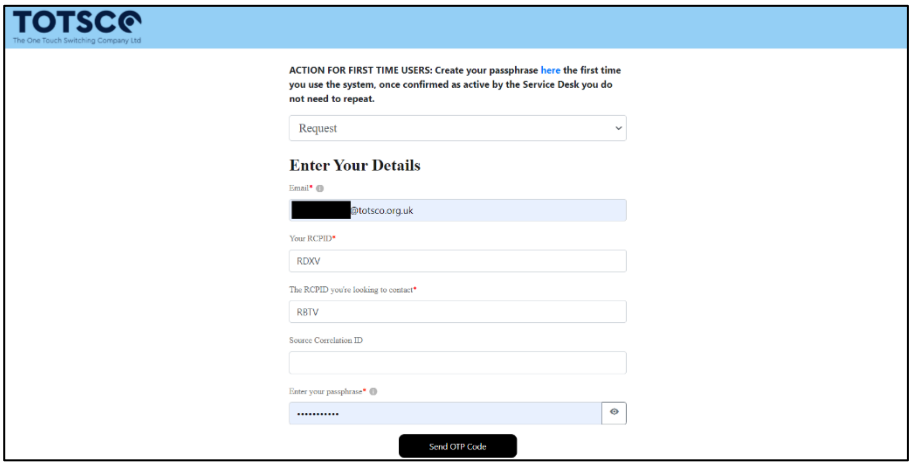
Click 'Copy' and send this along with your RCPID and the email address you wish to register with, to the Service Desk (service_desk@totsco.org.uk).




Click 'OK' to confirm.

Once you receive confirmation from the Service Desk, this implies you have now opted into the service and can continue to use the CP-to-CP Communication Tool.

You can now go back into the CP-to-CP Communication tool and start the process of entering your request.




First enter the email address, this is where the OTP code will be sent to.

Enter your RCPID and then the RCPID of the CP you are intending to send the request to. Sometimes you may see an Error message with a code, this is explained below.

| Error Code Description | |
|---|---|
| **101** | The RCPID you are looking to contact has not opted in for this feature. |
| **102** | Your RCPID seems wrong or there is no record for it. |
| **103** | The RCPID you are looking to contact seems wrong or there is no record for it. |
| **104** | Both of the RCPIDs you have provided are invalid or there are no records for them. |
| **105** | Your RCPID has not opted in for this feature and can't be validated |
| **106** | Both RCPIDs have not opted in for this feature. |

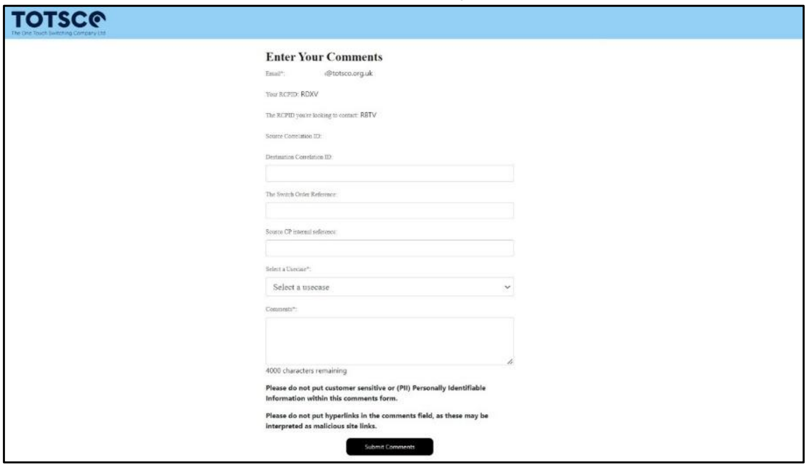
If you have a Source Correlation ID, you may enter it here, but it is not a mandatory field.
Finally enter your passphrase that you registered earlier.

Press ‘Send OTP Code’.

You will see the following screen.


Please check your email for your OTP and enter your OTP that you received here.

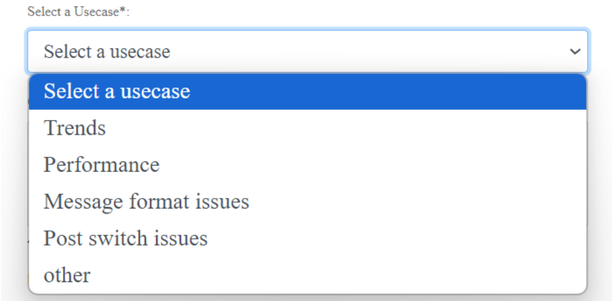
You will be then taken to the screen below where you can now enter the details of your request.




Your email, your RCPID, the destination RCPID and, if entered earlier, the Source Correlation ID will be automatically filled.

If appropriate, you can enter a Destination Correlation ID and The Switch Order Reference, these are not mandatory. You can also enter your internal Source CP internal reference; this could be an email address of a member of your team. Again, this is not a mandatory field.

Next is the drop-down list of Use Cases.



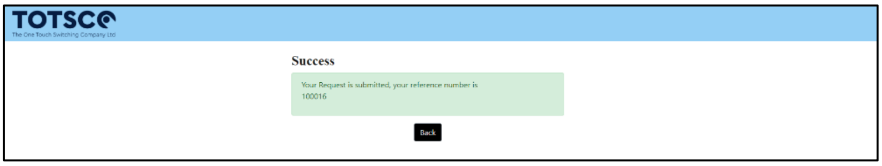

Please select the most appropriate Use Case for your query.

In the Comments field, you can enter the details of your query.

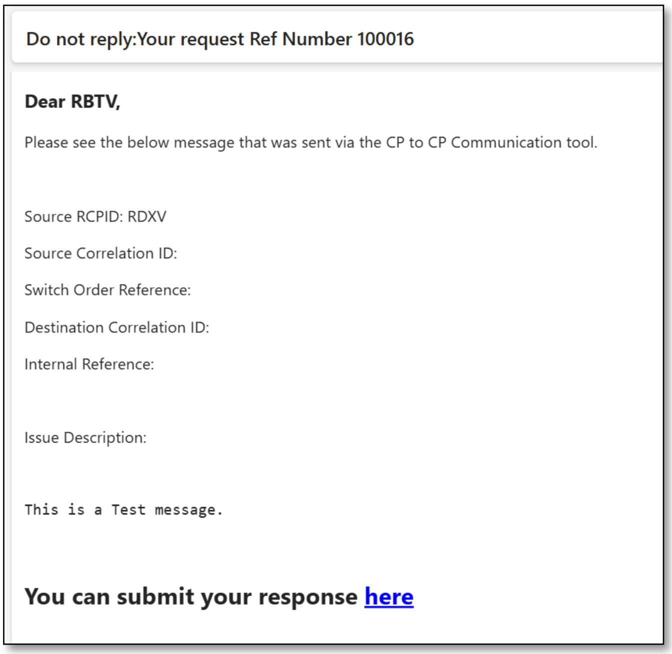
Please do not put customer sensitive or (PII) Personally Identifiable Information within this comments form. Also, please do not put hyperlinks in the comments field, as these may be interpreted as malicious site links.

Click on ‘Submit Comments’ once ready.

The following screen will appear.




The recipient of the request will receive the following email.

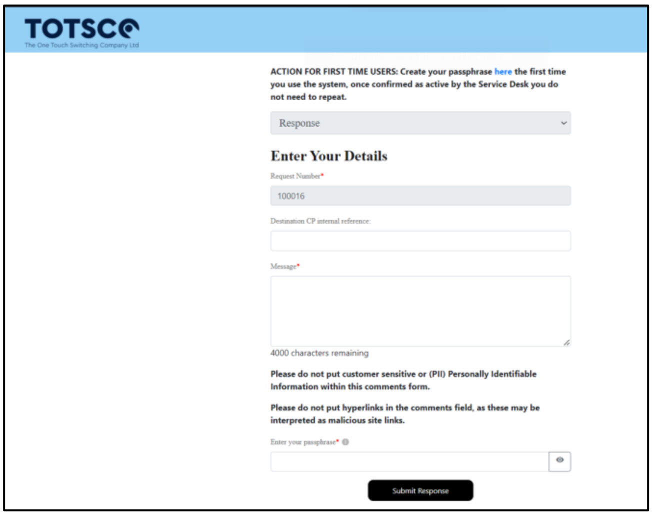


### How to respond to a query

Having received an email, like the one shown above, you can choose to respond by clicking ‘here’, next to ‘You can submit your response….’.

You would have only received the email if you had already opted into the service.

You will be taken to the Response page of the CP-to-CP Communication Tool.

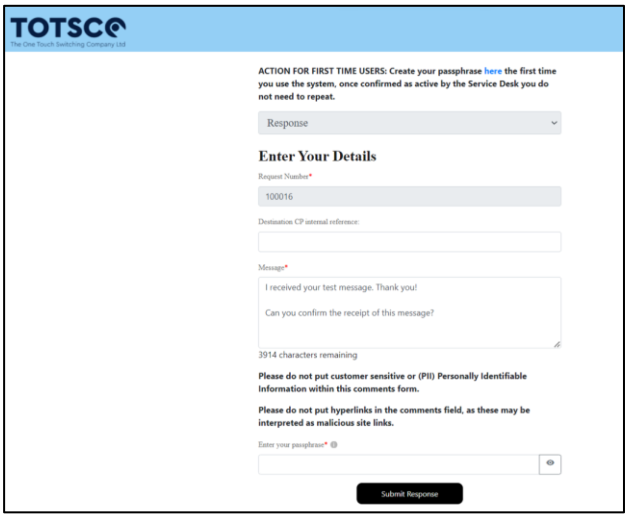



Note the request number has already been pre-populated.

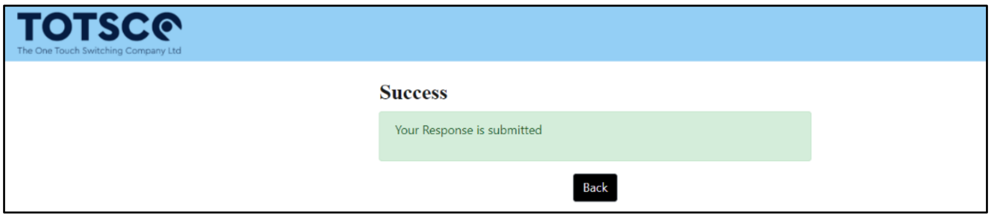
You can enter a Destination CP internal reference here, but this is not mandatory.
In the Message field, you can enter your response to the query.

Please do not put customer sensitive or (PII) Personally Identifiable Information within this comments form. Also, please do not put hyperlinks in the comments field, as these may be interpreted as malicious site links.

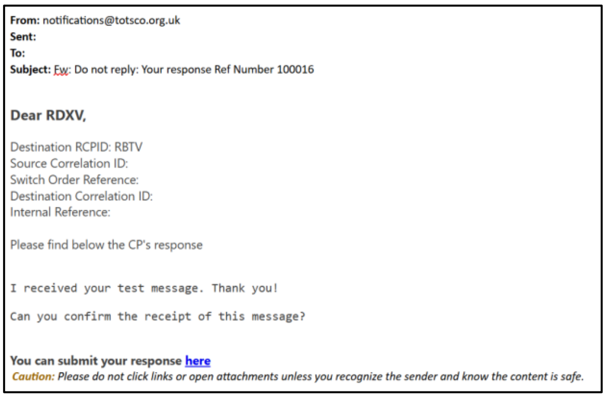
Finally, you need to enter your passphrase which you registered with.



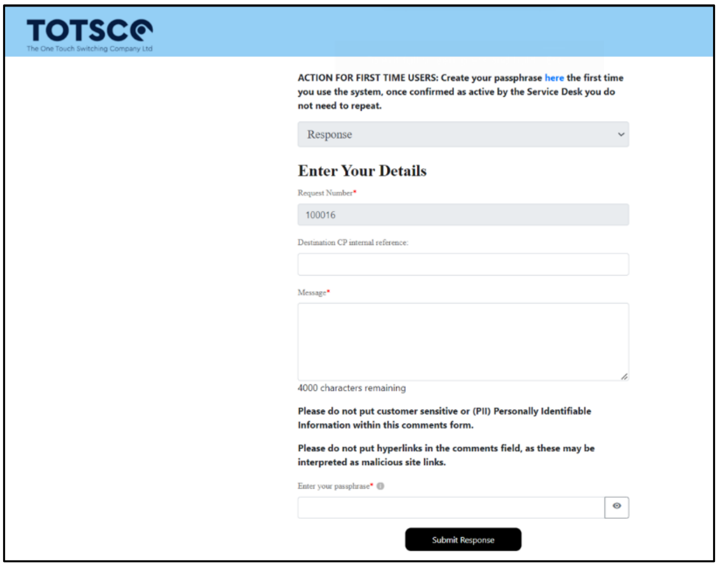
Click on ‘Submit Response’ once ready. You will see the following screen.




The recipient of your response will receive the following email.




You can choose to respond by clicking ‘here’, next to ‘You can submit your response….’. This will take you to the following screen where you can send your response and continue communication as needed. There is no limit to the number of exchanged messages.




If you have any questions, please contact our **Service Desk** on service_desk@totsco.org.uk.

## HELP AND SUPPORT

Our Service Desk is here to help **Monday to Friday, 8am – 8pm**, and **Saturday, 8am – 12pm** (excluding major incidents, which are managed 24/7).

You can raise issues or enquiries at any time using the Account Management Portal, available 24/7, 365 days a year. However, please note that issues will only be actioned during Service Desk hours unless they relate to a major incident.

If you need **help or support**, there are three ways to get in touch:

### RAISE A TICKET

Raise a ticket via the Account Management Portal (recommended) - See 'Manage Tickets' (page 13) for step-by-step guidance on raising a ticket.

### CALL US

Call us during Service Desk hours on +44 (0)800 026 0403.

### EMAIL US

You can email us on: service_desk@totsco.org.uk.

# GLOSSARY

| Term | Definition |
|---|---|
| **Access Token** | A digital key that allows a user or application to access a specific set of resources on a server. It's like a 'ticket' that grants permission to enter and interact with protected areas in a system. |
| **ACP** | An ACP is an Access Network Provider. ACPs known to TOTSCo will be listed in the commercial onboarding stage of the process. |
| **API (Application Programming Interface)** | A set of rules and protocols for building and interacting with software applications. APIs allow different software systems to communicate with each other. |
| **API Key** | Unique identifiers used to authenticate and authorise applications or users accessing an API (Application Programming Interface). These keys are crucial for ensuring secure communication between different software systems, allowing controlled access to specific functionalities. |
| **Audit Code** | A unique identifier used in tracking and reviewing changes or transactions within a system. It helps in maintaining records for compliance, quality control, and operational analysis, ensuring transparency and accountability in processes. |
| **Authorisation Server** | A server that verifies identity and grants access tokens in the OAuth 2.0 authentication flow. It acts as a 'bouncer', deciding who gets in. |
| **CP (Communications Provider)** | As defined in Communications law, this is a company that provides telecommunication services such as internet access, telephone services, and mobile connectivity to consumers. |
| **Dashboard** | A user interface that organises and presents information in an easy-to-read format, typically using graphs and tables, allowing users to monitor and manage their services or applications. |
| **Data Format** | The structure in which data is stored, processed, and transmitted, such as XML or JSON. It's the 'language' that systems use to understand the information they exchange. |
| **Gaining Provider Led Business (GPLB) Switching** | Ofcom's General Condition C7 requires that business customers must be able to switch their services using a gain provider led process — regardless of the underlying network or technology used by their current provider. To meet this requirement, the telecoms industry — led by the Gaining Provider Led Business (GPLB) Steering Group (GPLB SG), has developed the 'GPLB Industry Switching Process'. |
| **Losing Retail Communication Provider (LRCP) ("Losing Provider")** | In the "Revised General Conditions 3 April **2023"4**, Ofcom provides the following **definitions: means**: the Communications Provider from whom a Switching Customer is or is considering transferring. |

| Term | Definition |
| --- | --- |
| **MAP (Managed Access Provider)** | A Managed Access Provider, sometimes known as a Third- Party Integrator**,** is a company a CP can partner with to manage message exchanges on their behalf. For more information and a list of TOTSCo Managed Access Providers, please visit the TOTSCo website. |
| **mTLS** | mTLS stands for Mutual Transport Layer Security. It's an enhanced form of Transport Layer Security (TLS) where both the client and the server**,** in a communication exchange**,** authenticate each other's identities using digital certificates. |
| **OAuth 2.0** | An open standard for access delegation, used to grant websites or applications access to information on other websites but without giving them the passwords. |
| **Protected Resource** | Data or a service that requires permission to access, typically secured by an access token in OAuth 2.0. |
| **Resource Server** | A server where protected resources are hosted. It responds to requests for resources, validating access tokens before serving the request. |
| **RCPID** | An RCPID is a Retail Communication Provider Identifier. Your RCPID is unique and will be used for identification and communication with CPs. This key identifier is used in the switching process. You can see your RCPID at any time in your account management screen. |
| **Scope** | In OAuth 2.0, this refers to the extent of the access that is being requested. It defines what permissions the application needs, like a 'list' of areas within a system to which an access token should allow entry. |
| **TLS** | Transport Layer Security, a cryptographic protocol designed to provide secure communication over a computer network. It ensures the privacy and data integrity of the messages exchanged between web applications and servers, widely used for securing internet connections and protecting sensitive data. |
| **Token Endpoint** | The location where the application can request and receive access and refresh tokens once authorisation has been granted. |
| **User Agreement** | Before you can use the TOTSCo Hub, you'll need to sign the User Agreement. This is a legal contract between your organisation and TOTSCo. It outlines the terms for how you can use the Hub, including access to testing and live services for both residential and business switching. It's a key step in the onboarding process — we can't give you access to the Hub until it's signed. |
| **Whitelisting** | Whitelisting refers to the practice of allowing specific entities, email addresses, IP addresses, or programs to bypass typical security measures. It's a method used to permit access or ensure that certain trusted sources are approved and permitted while blocking or restricting others. |