Thames Water Portal User Guide

Thames Water Utilities Limited (TWUL) Wholesale
Published date: 17 September 2021
Effective date: 22 September 2021
Version 6.0

Contents

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

Change history:

February 2019 (V3.1) – due to enhancements to the Portal. A summary of the changes are as follows:

- Additional forms available including G/02 & G/03 (Trade Effluent services)
- Thames Water users can submit a form on behalf of a Retailer
- Wholesaler led form submission added
- Additional information available on services requests in progress / completed
- Notifications (previously sent by SMFT)
- Customer Contacts (previously sent by SMFT)

January 2020 (V4.0) – due to enhancements to the Portal and general format refresh. A summary of the changes are as follows:

- Section added for new Cloning facility
- Screen shot refresh
- Exercise's renumbered

October 2020 (V4.1) – rebrand only

November 2020 (V5.0) – additional appendix added for H01 – supporting forms for non-return to sewer requests

September 2021 (V6.0) – amendment made to reflect the go live of the Central Bilateral Hub, which means C01 requests are not possible via the Retailer Portal. Note added as C01 used as example in this guide.

Note – the use of the word 'you' refers to the Retailer unless specified differently in the business scenario heading on each exercise.

Exercise 1: How to log into the Portal if you have an Office 365 account

Business scenario

You want to log into the Portal for the first time and you have:

- already been given a username and password
- an Office365 account

Access can be provided by:

- A Retailer, as all will have one person set up as an administrator. The Administrator will be able to create further users for their team
- Thames Water Wholesale Market Services Administrator

Learning outcome

By the end of this exercise, you will be able to log into the Portal to access the landing page.

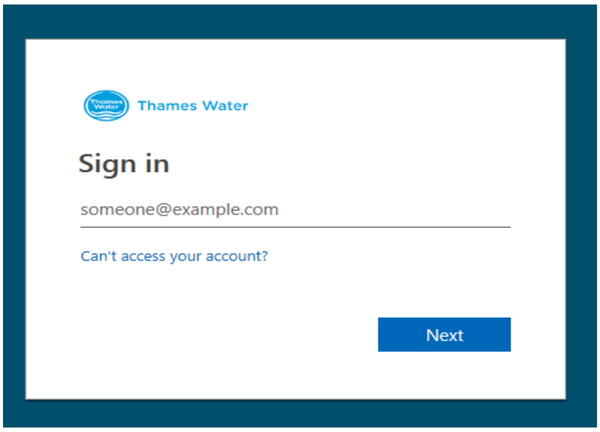
Steps

Logging into the Portal

1. Click on either Google Chrome or Firefox

2. Type in [*https://wmsportal.thameswater.co.uk*](https://wmsportal.thameswater.co.uk) in the 'url' field

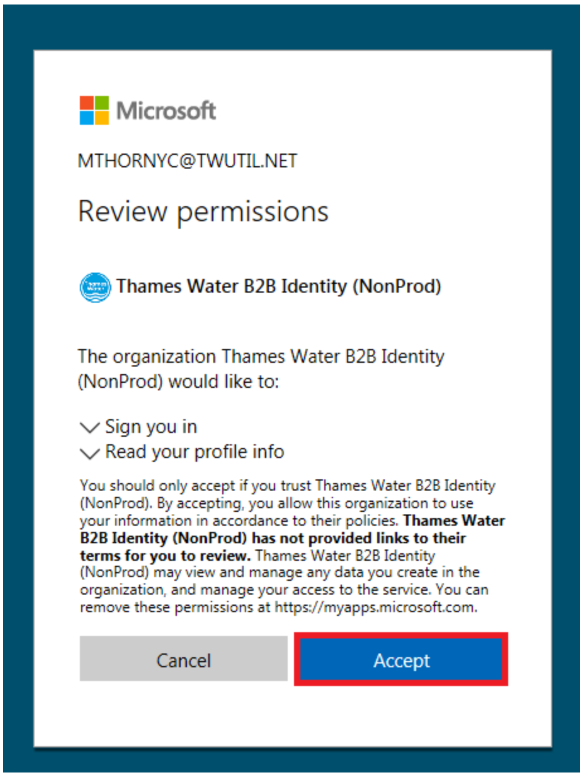
3. The 'Sign in' screen will be displayed



4. Sign in by typing in your email address

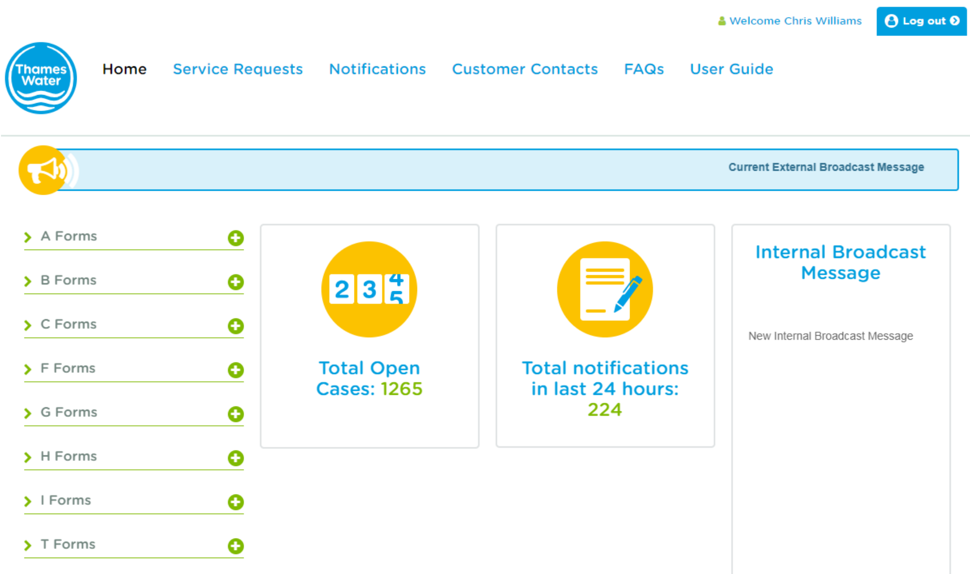
5. Click 

6. The 'Review permissions' screen will be displayed



7. Click 

8. The landing page will be displayed

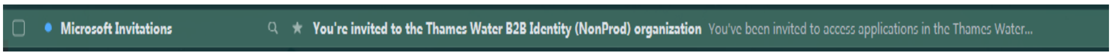


Exercise 2: How to log on the first time without an Office365 account

Business scenario

You want to log into the Portal for the first time but do not have an Office365 account.

You have received a "Microsoft Invitation" email, this will help you set up your access to Office365.



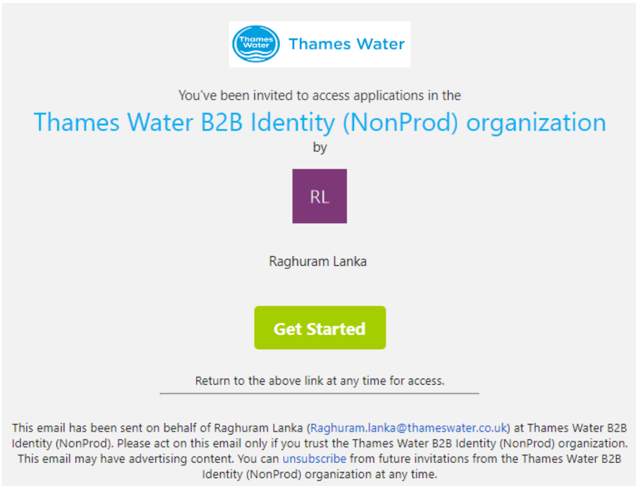
Learning outcome

By the end of this exercise you will be able to log into the Portal and change your password, if required.

Steps

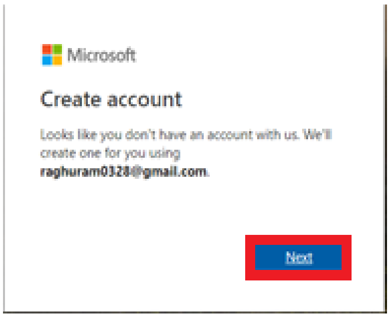
Logging into the Portal

1. Open the invitation you received by email



2. Click 

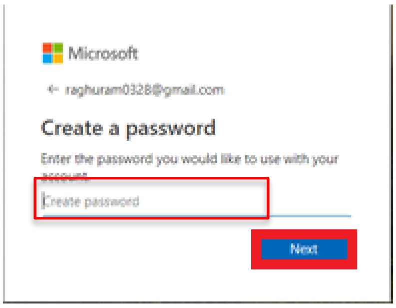
3. The 'Create account' screen will be displayed



4. Click 

5. The 'Create a password' screen will be displayed

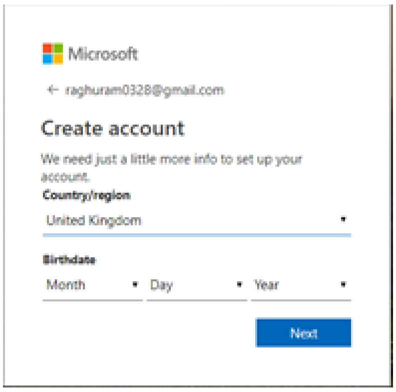
Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021



6. Click in ‘Create password’ and type in your password

7. Click Next

8. The ‘Create account’ screen will be displayed



9. Click **Country/region**

10. Click ▼

11. Select your Country, e.g. United Kingdom

12. Click **Birthdate**

13. Click ▼ to select the month

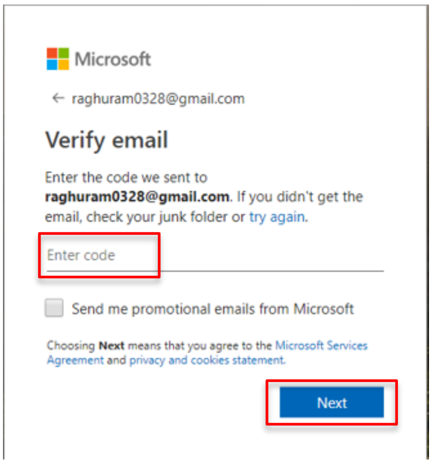
14. Click ▼ to select the day

15. Click ▼ to select the year

16. Click Next

Note - A verification code will be sent to your email address. This code is required for the next stage of the process

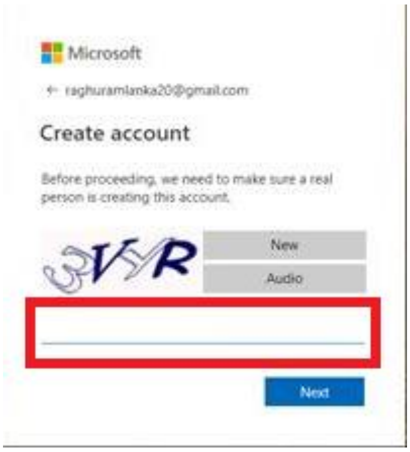
17. The ‘Verify email’ screen will be displayed



18. Click ‘Enter code’ and type in the code

19. Click Next

20. The ‘Create Account’ captiva screen will be displayed

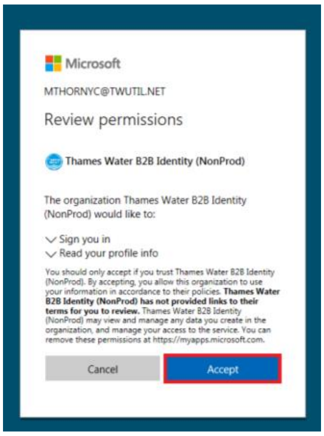


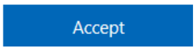
21. Click into the blank space provided

22. Type in the code that is displayed on the screen

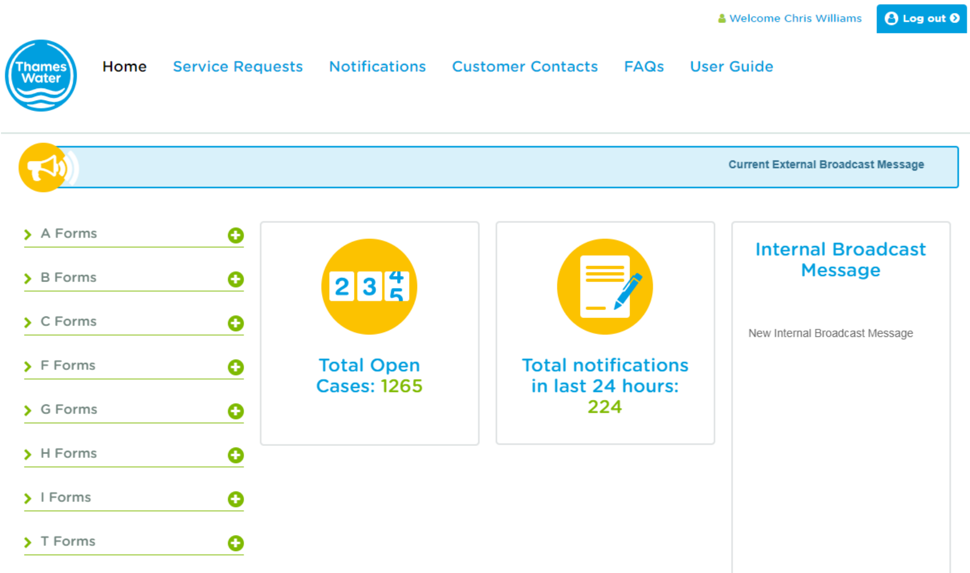
23. Click Next

24. The ‘Review permissions’ screen will be displayed



25. Click 

26. The landing page will be displayed



Exercise 3: How to create a new service request

Business scenario

You are already logged into the WMS Portal and would like to submit a new service request. There are 40 internal business processes underpinned by 30 market defined forms that will be pre-populated with rules and validations.

The following forms are available to you to submit request via the Portal:

A/05, B/01, B/03, C/02, C/03, C/04, F/01, F/02, G/01, G/02, G/03, H/01, H/03, H/04, I/01, I/02, I/03, I/04, T/002; T/005, T/009, T/010, T/013 & T/015.

Note – although in this exercise we will be completing the C/01 form, this form was withdrawn when the Central Bilateral Hub was opened on 22 September 2021. As this guide is designed to demonstrate functionality, we have left this as the example rather than to replace with a different form, which in time will also be withdrawn as the capability of the Central Bilateral Hub increases.

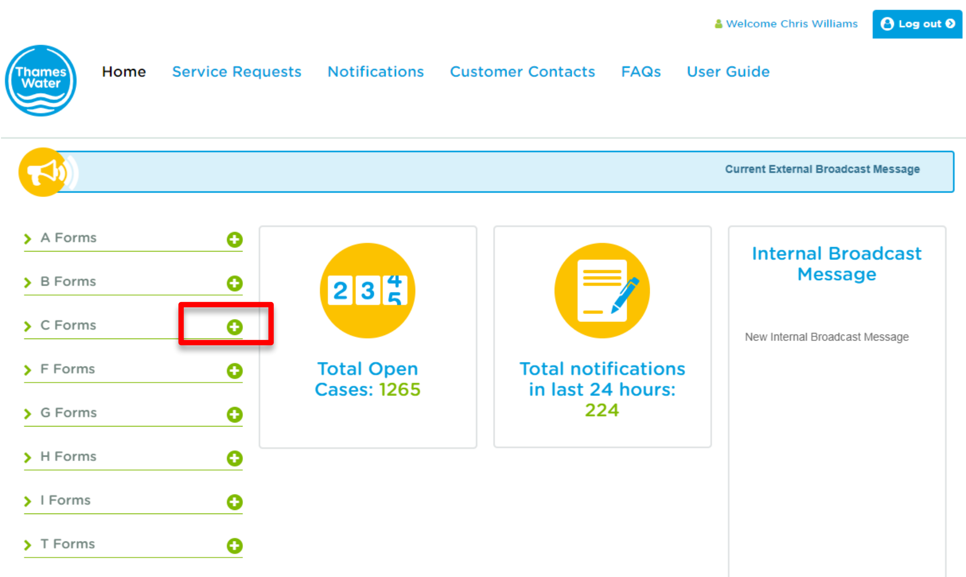
Learning outcome

By the end of this exercise you will be able to submit a new service request on the Portal.

Steps

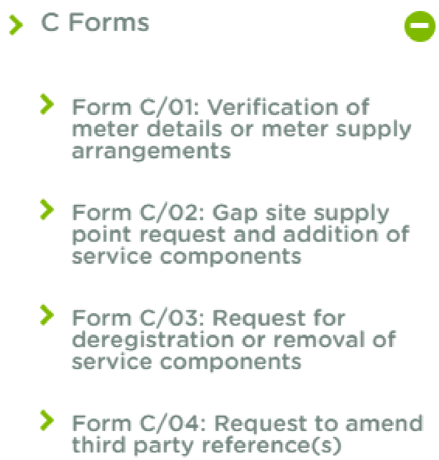
Where to find the service request forms

1. From the landing page



2. Click to expand the C Forms section

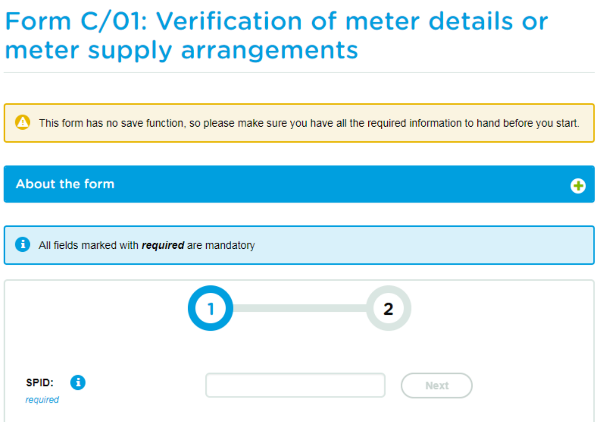
3. The C forms section will be displayed



How to open and complete a form

1. Click Form C/01: Verification of meter details or meter supply arrangements to select the form

2. The Form C/01 is now displayed and requires the SPID number



Note - There will be a series of tabs that you will need to complete before you can submit the form.

Please look out for mandatory fields as you will not be able to submit a case without completing this information.

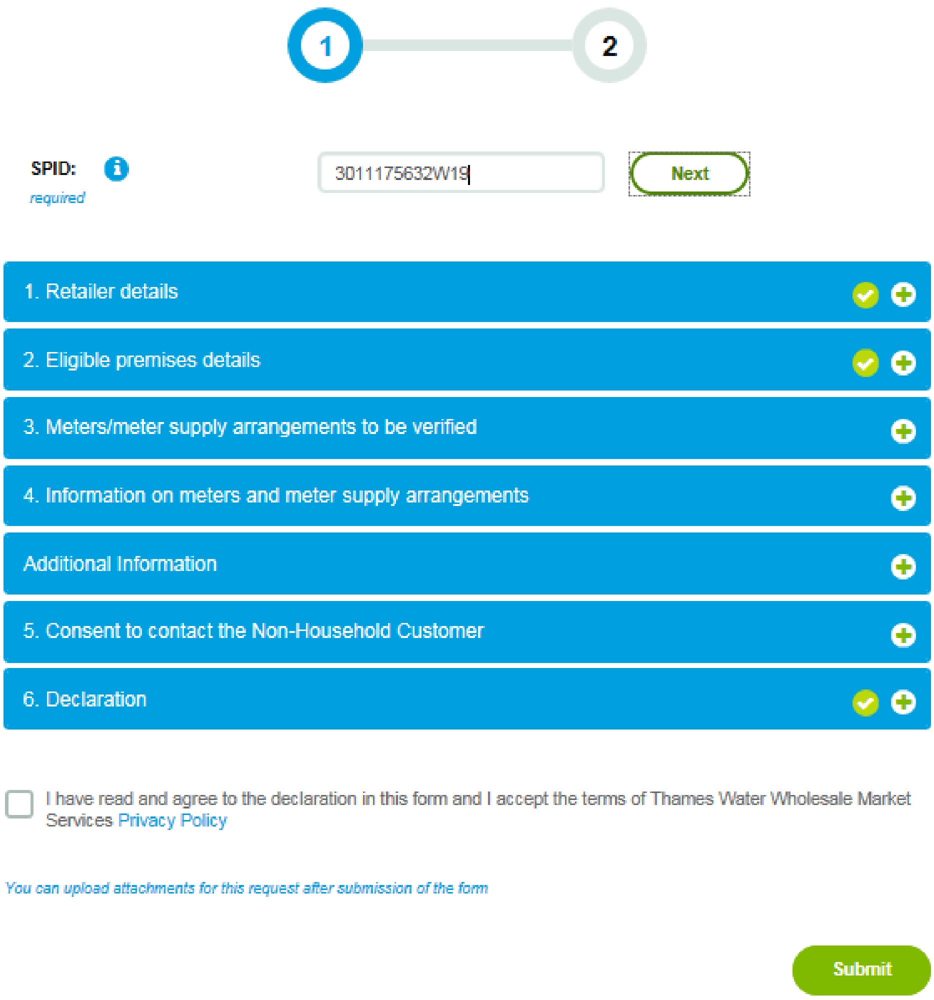
The form has no save function, so please ensure you have all the information required to hand.

Important

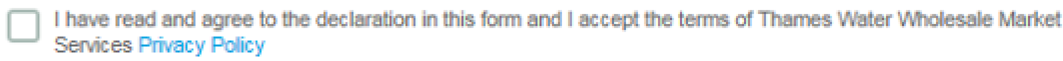
Please ensure the SPID that is entered is correct as information will be automatically populated from data, we have on our records

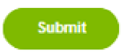
3. Enter all the required details in the applicable sections, a tick will appear next to the plus sign, once the form is submitted as this is the validation point.

4. The Form C/01 is now displayed and ready for completion



5. Click the following declaration after you have read and agreed to the privacy policy

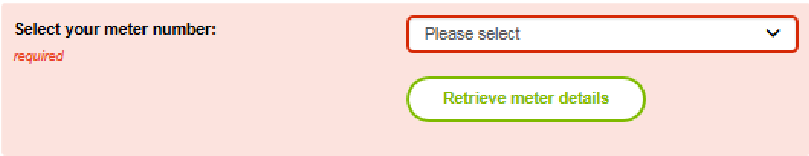


6. Click 

. If any mandatory fields have not been completed, you will be unable to submit the form and the information required will be shown in red

7. The display when mandatory information is missing

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

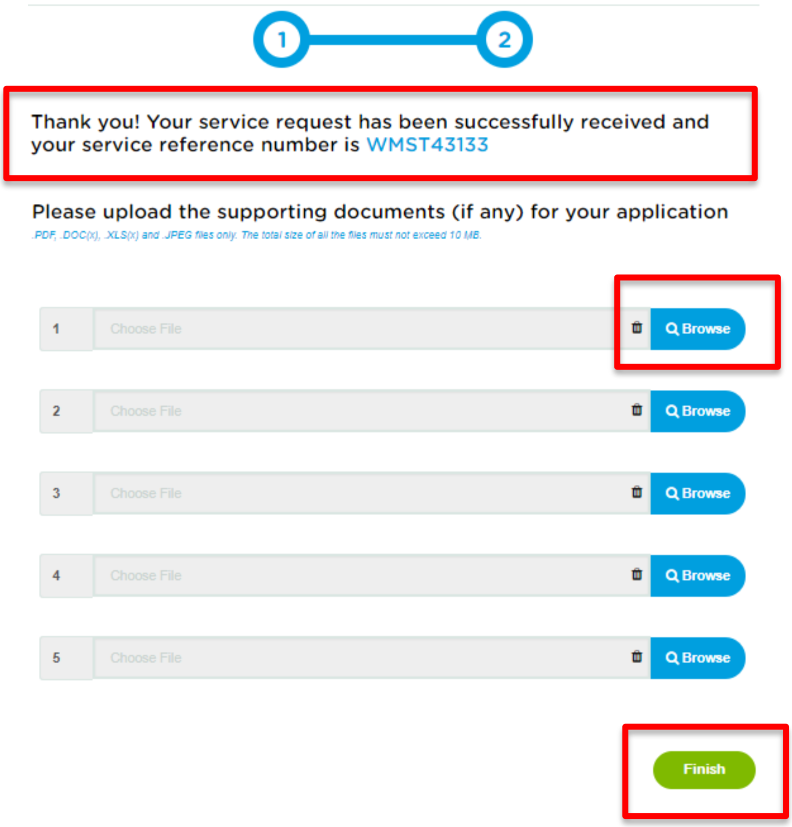


How to add attachments

Note - Up to 5 attachments can be added to the service request and this will be done after you have submitted the form and received the WMST reference number.

Files are restricted to .pdf, .doc (x), .xls (x) & .jpeg and the maximum size for all the files in total is 10mb.

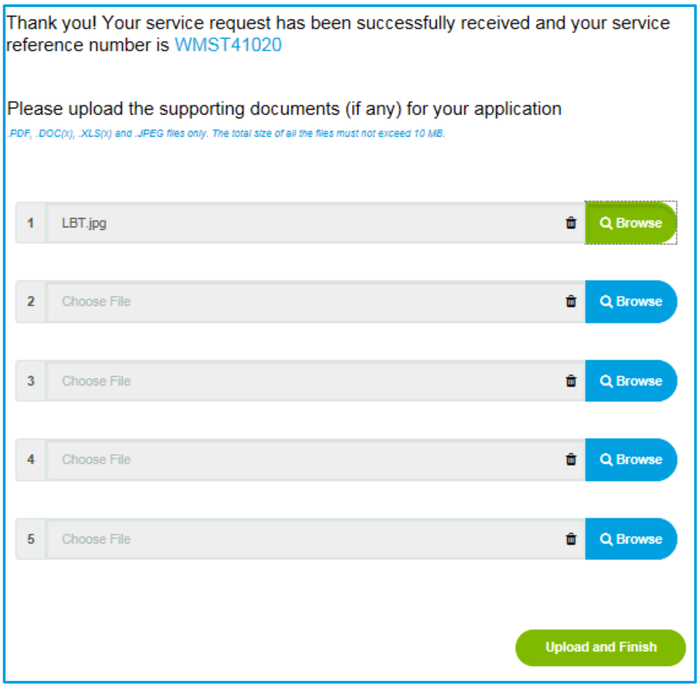
1. Click Finish if you have no attachments or Browse to select a document to upload



2. This document name will appear next to the document number 1 – 5. You can remove a file prior to uploading by selecting the icon
3. When all the documents have been added, select Upload and Finish

Example

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021



Thank you! Your service request has been successfully received and your service reference number is WMST41020

Please upload the supporting documents (if any) for your application

.PDF, .DOC(x), .XLS(x) and .JPEG files only. The total size of all the files must not exceed 10 MB.

1	LBT.jpg	Browse
2	Choose File	Browse
3	Choose File	Browse
4	Choose File	Browse
5	Choose File	Browse

Upload and Finish

Note - Thames Water colleagues can submit service requests on behalf of Retailers, should a form be submitted by another acceptable means.

The form will show the Thames Water persons name and email address, but the form will show the Retailer of the SPID – see example below.

The 'required' fields should be amended to the contact details of the Retailer so that the acknowledgement will be sent to the correct person.

The Retailer will be able to track the progress of a case in the 'Service Requests' section – see exercise

1. Retailer details

Retailer name:	Crystal Water
Retailer ID:	CRYSTAL-R
Retailer's own reference:	
Contact name: *required*	Chris Williams
Contact number: *required*	01234567890
Contact e-mail: *required*	chris.williams@thameswater.co.uk

Should Thames Water colleagues want to submit a form from Thames Water, then the wholesale led option should be used – see exercise 4

Exercise 4: How to create a wholesaler led service request

Business scenario

You are a Thames Water colleague and you are already logged into the WMS Portal and would like to submit a new service request.

In this exercise we will be using the C/01 form, but the functionality is the same for completing any of the forms with the wholesale led option. The forms that have the option are:

- C/02
- C/03

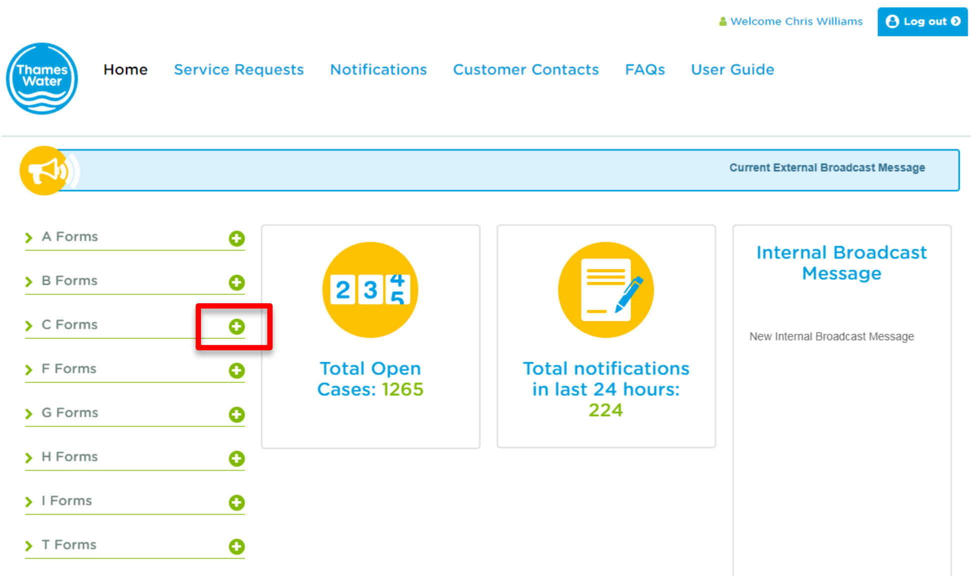
Learning outcome

By the end of this exercise you will be able to submit a wholesaler led service request on the Portal.

Steps

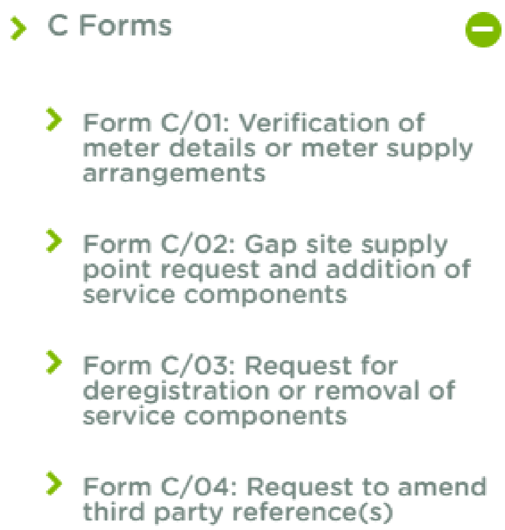
Where to find the service request forms

1. From the landing page

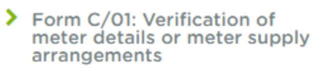


2. Click to expand the C Forms section

3. The C forms section will be displayed



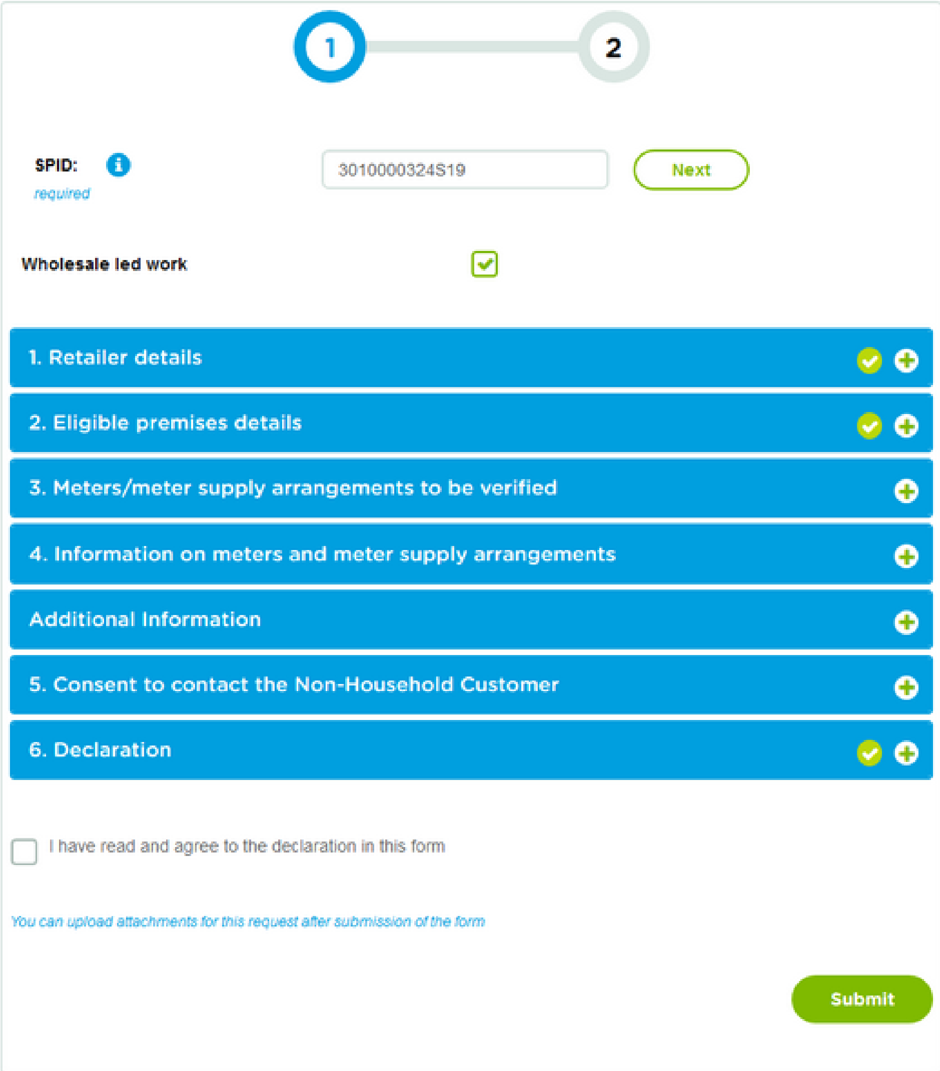
How to open and complete a form

1. Click 

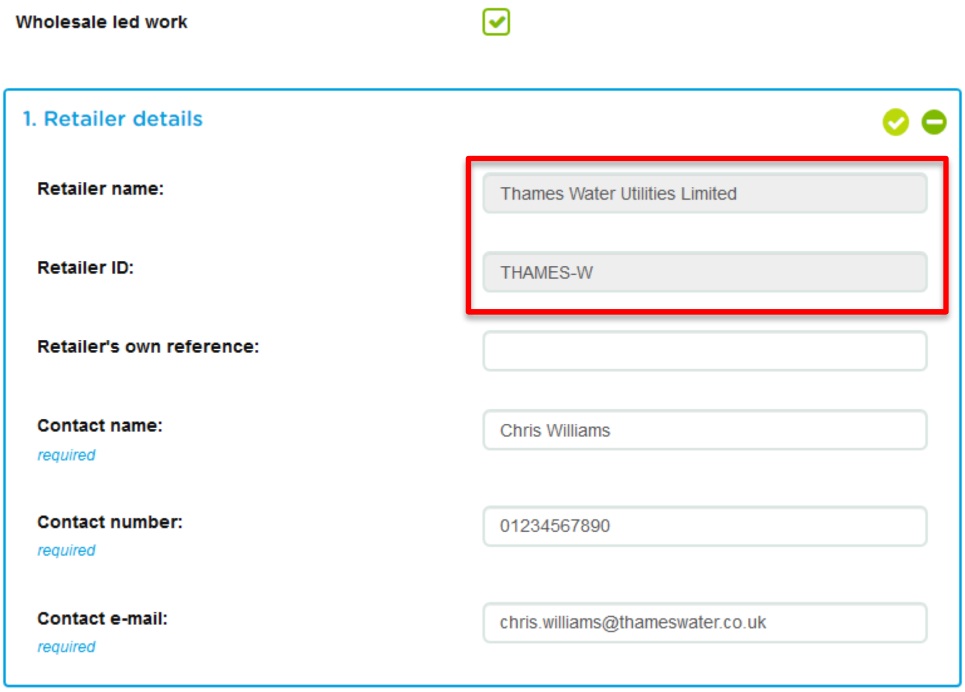
to select the form
2. The form C/01 is now displayed and requires the SPID number

3. Enter the SPID number and select the Wholesaler led work tick box – click 

4. The form C/01 is now displayed and ready for completion



Note - The 'Retailer details' tab will reflect the form being submitted by Thames Water as opposed to the Retailer details. See example below.

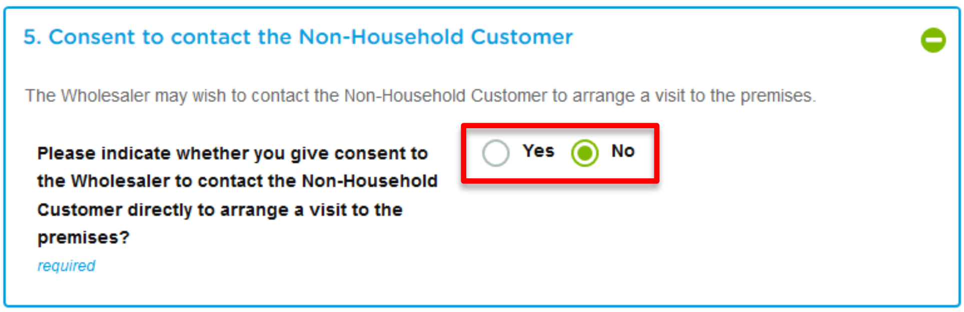


5. Follow the instructions on completing the form as explained in exercise 3.

Note - The ‘Consent to contact the Non-Household Customer’ is a mandatory item and therefore must be completed even for wholesaler led forms.

Complete as follows:

- Select ‘No’ and if consent is required as a site visit is necessary, it will be requested at that time or
- Select ‘Yes’ if this is linked to another request (i.e. this is follow-on work) where the initial Retailer form gave us consent.



Exercise 5: How to interact with the end customer to create a G/02 or G/03 service request

Business scenario

You are submitting a request for a trade effluent service that requires the form to be completed in part by the end customer with images of a written signature uploaded to the online form by the NHH customer and the Retailer.

The process will commence with the Retailer, then involve the NHH customer, then back to the Retailer to submit to the service request to Thames Water.

Note – we have been made aware of email addresses that our portal blocks such as MSN and AOL. If you identify other providers where the end customer is not receiving the form from you, please let us know. We are working hard to fix this issue for MSN and AOL.

Important – it is the retailer responsibility for ensuring that the correct information is submitted in the correct fields to Thames Water.

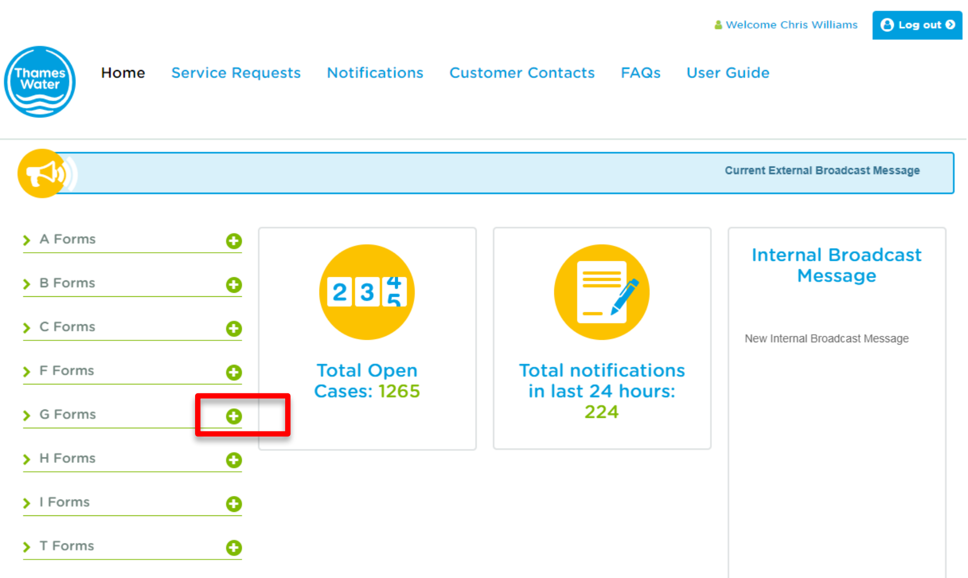
Learning outcome

By the end of this exercise you will be able to send a G/02 or G/03 service request to the end NHH customer and once returned, submit the request to Thames Water.

Steps

Where to find the service request forms

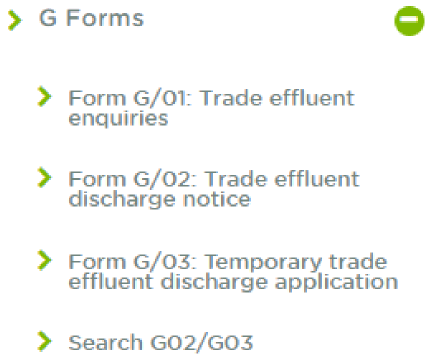
1. From the landing page



2. Click to expand the G Forms section

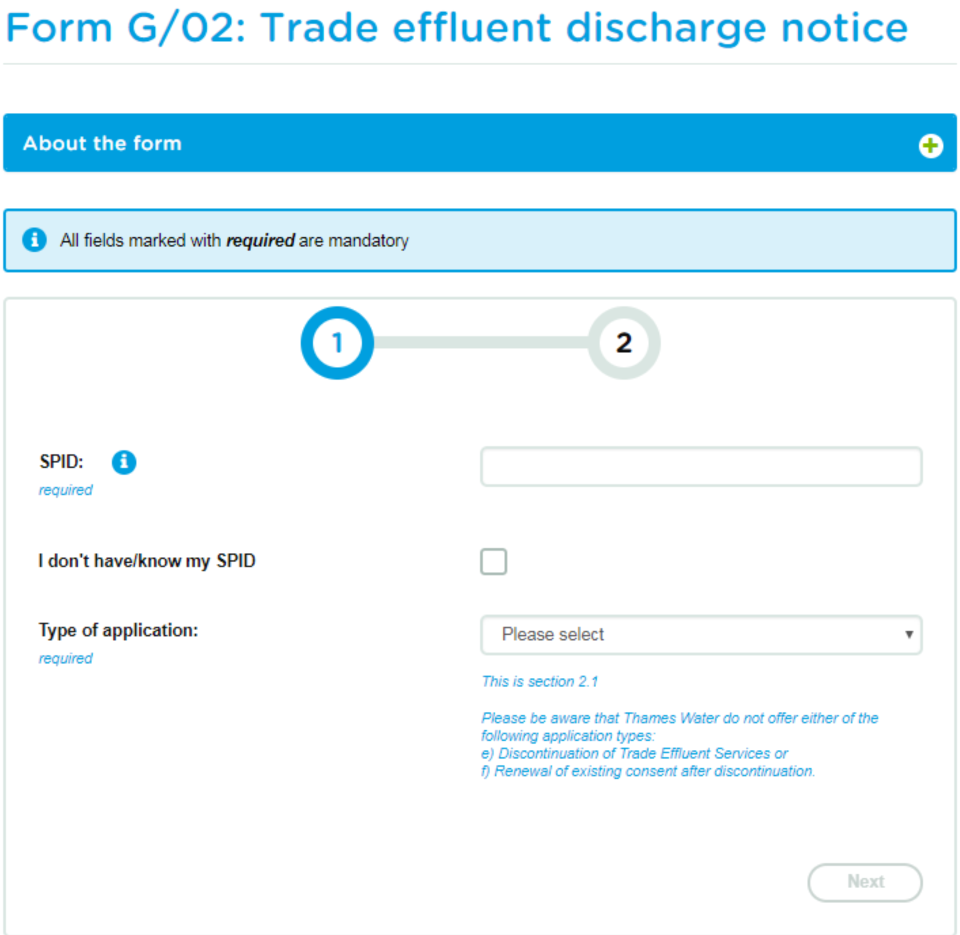
3. The G forms section will be displayed

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021



How to open and complete a form

1. Click "Form G/02: Trade effluent discharge notice" or "Form G/03: Temporary trade effluent discharge application" to select the appropriate form
2. The relevant form is now displayed. For this exercise we have used G/02 to demonstrate how to upload signatures and interact with the end customer


Form G/02: Trade effluent discharge notice

About the form

All fields marked with ***required*** are mandatory

1 2

SPID: *required*

I don't have/know my SPID

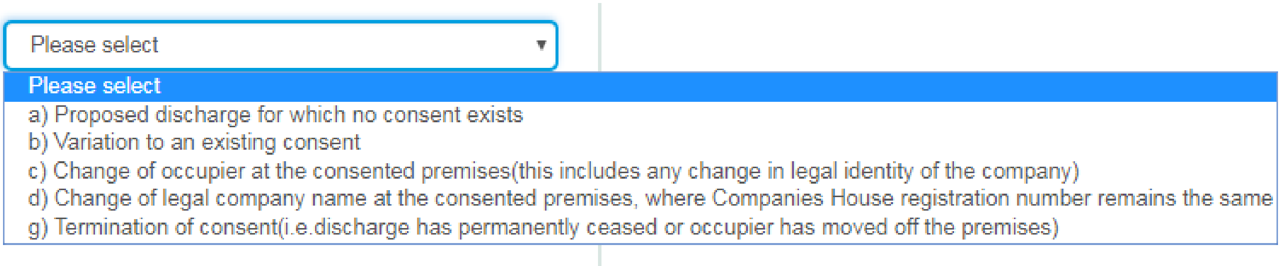
Type of application: *required* Please select

This is section 2.1

Please be aware that Thames Water do not offer either of the following application types:
e) Discontinuation of Trade Effluent Services or
f) Renewal of existing consent after discontinuation.

Next

3. Insert the SPID or select the 'I do not have / know my SPID' as appropriate and select the type of application from the following



Note - There will be a series of tabs that you will need to complete before you can submit the form to the end customer. The end customer then needs to do the same before they can submit back to you.

The online form is self explanatory from a functionality point of view and the validation criteria forces accurate data submission.

Please look out for the mandatory fields as you will not be able to submit a request without completing this information.

The form **does** have a save function, which is different from most of the other online forms.

To add a signature, you first must create a soft copy of your signature in a GIF, JPEG, JPG or PNG file type with a maximum file size of 1mb.

Remember - it is a requirement that both the Retailer and the NHH customer must upload a signature in the specified formats. If more than one end customer needs to sign the application form, we require one soft copy comprising all the signatures needed, uploaded.

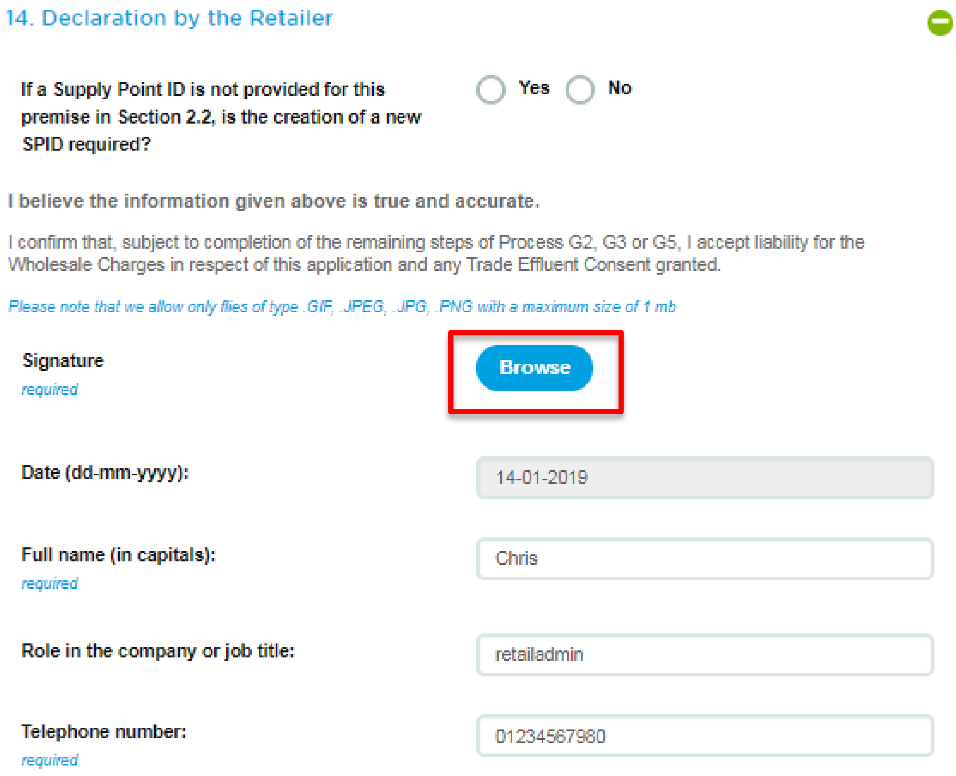
4. What you will see

5. Complete 1, 13 & 14 including the upload signature part in section 14. Section 1 & 13 have default responses, so you only need to edit if the default information is incorrect. Remember that you have the 'Save' option available on the G/02 and G/03 forms. If you save before submitting, the form will be available to access in the 'Search G02/G03' screen (see page 29). The form remains in the 'Search G02/G03' screen until it is submitted to Thames Water or you delete it as the request is no longer required.

How to add a signature

Note - This example is the Retailer section of the form. The same functionality applies to the NHH customer section of the form as well.

It is mandatory for the Retailer to upload a signature at this stage of the process although it is possible to change the signature once the form has been returned from the end customer.


14. Declaration by the Retailer

If a Supply Point ID is not provided for this premise in Section 2.2, is the creation of a new SPID required? Yes No

I believe the information given above is true and accurate.

I confirm that, subject to completion of the remaining steps of Process G2, G3 or G5, I accept liability for the Wholesale Charges in respect of this application and any Trade Effluent Consent granted.

Please note that we allow only files of type .GIF, .JPEG, .JPG, .PNG with a maximum size of 1 mb

Signature *required*	Browse
Date (dd-mm-yyyy):	14-01-2019
Full name (in capitals): *required*	Chris
Role in the company or job title:	retailadmin
Telephone number: *required*	01234567980

Remember - it is a requirement that both the Retailer and the end customer must upload a signature in the specified formats. If more than one end customer needs to sign the application form, one soft copy comprising all signatures needs to be uploaded.

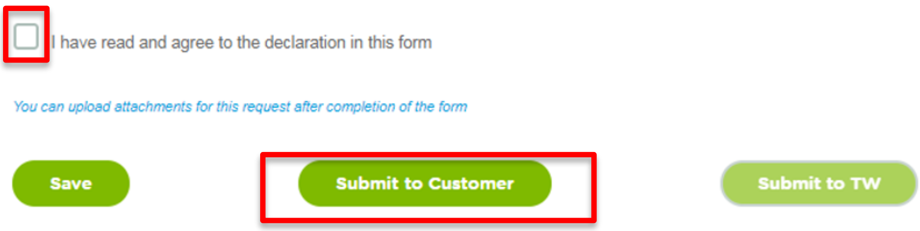
1. Click 

to select the document to upload

2. The display when a signature has been added. You can change or remove if required

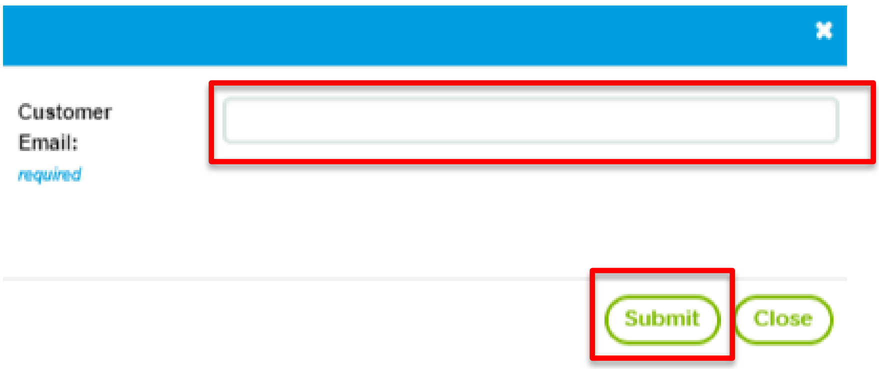
3. Select the Submit to Customer field having ticked the box I have read and agree to the declaration in this form and completed the 'Declaration by the Retailer' section (uploading your signature).

4. The screen view for submitting the form to the end customer

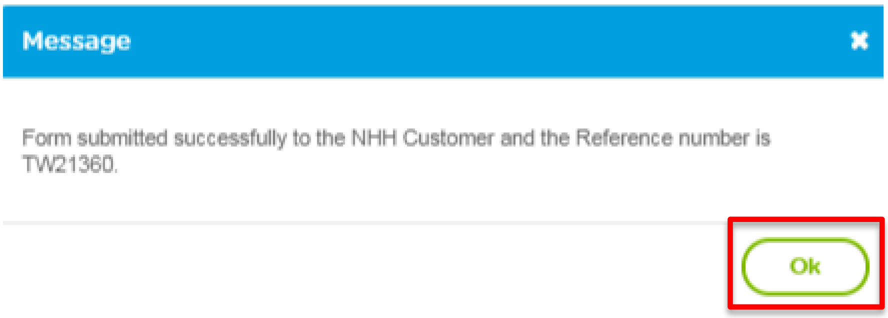


5. Insert the NHH customer's email address and select Submit

6. A letter with a link to the form will be emailed to the end customer by completing the email address in the required field and selecting submit



7. You will receive confirmation that the email has been sent with details of the reference number. Click OK to continue. You will also receive a copy of the email



What will the end customer receive?

The form is accessed via an URL in the content of the letter – see example below

****PLEASE DO NOT REPLY TO THIS MAIL****

Dear Customer,

Your Retailer, XXXXXX has instigated or reinitiated the application process for a Trade Effluent Consent.

To proceed with the application please click on the URL listed below and when prompted to do so, enter your unique reference no.TW12345 to continue with the application process.

https://wmsportal-uat.thameswater.co.uk/WMS/WMS-Forms/G02Customer?guid=f6c265fd-bd05-485b-b954-8f507406a7e7

This will allow you to complete all relevant sections, allow attachments to be added (drainage plans, safety sheets etc.) and for a signature to be uploaded.

It is possible to save your progress and if required pass to other members of your organisation by sharing the unique URL and Reference No.

Please note that the ability to add attachments (maximum 5) is at the end of the process after the signature has been uploaded.

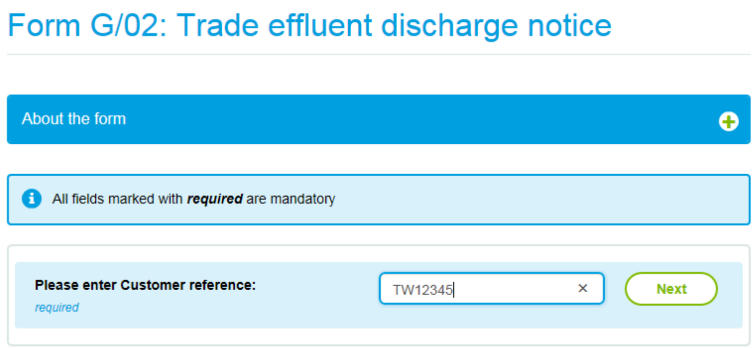
On submission, an notification email will be triggered to XXXXXX, along with any attachments, for them to complete the application process on your behalf.

Regards

Thames Water Trade Effluent Team

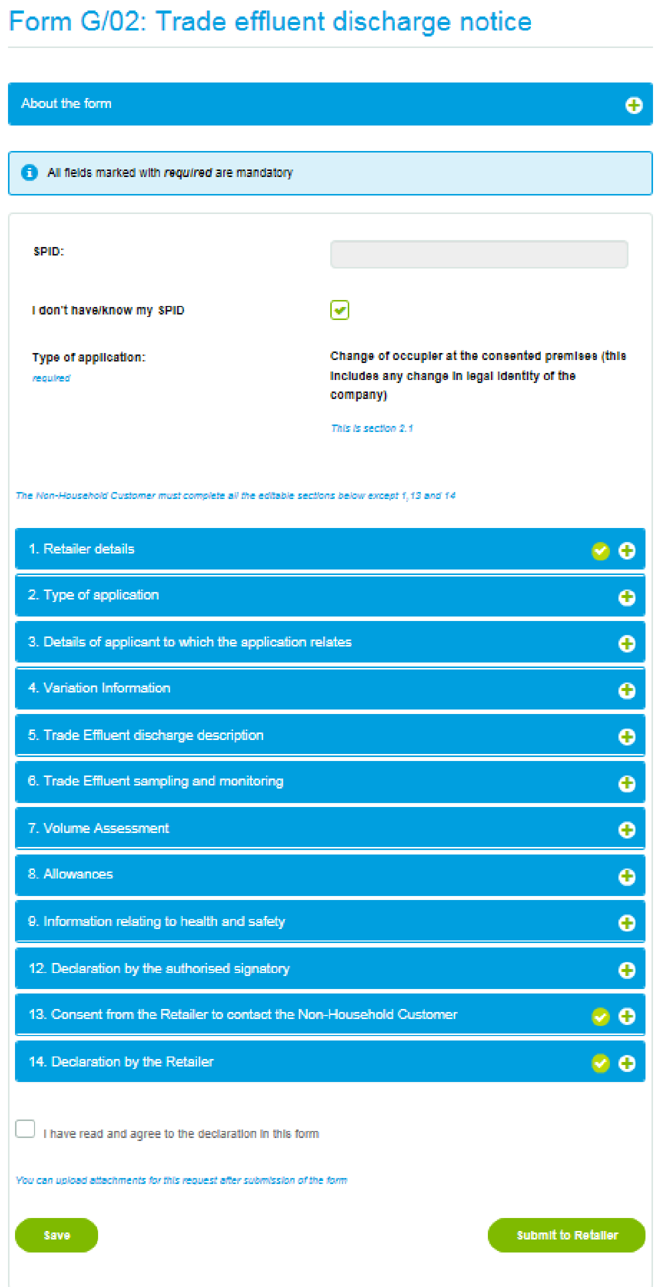
What does the end customer see when they click the link?

The screen view of the form to be completed by the NHH customer



1. Enter customer reference which is the ‘unique reference no.’ from the email sent and select next. This will open the form to complete

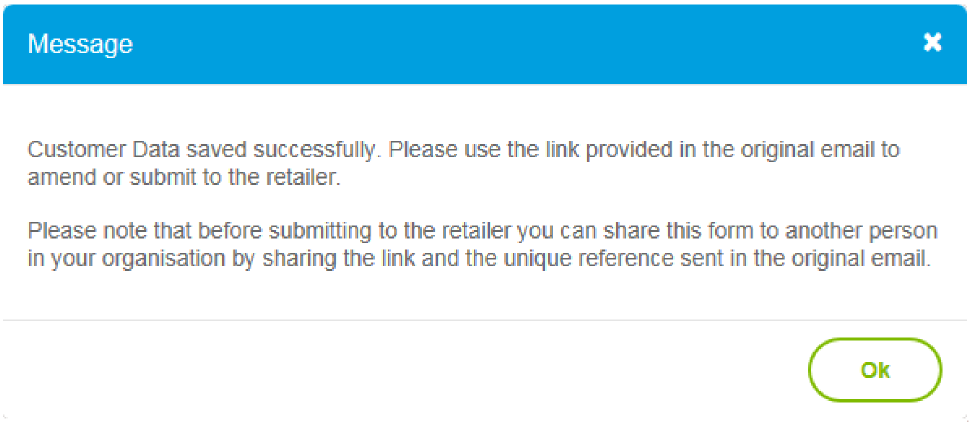
2. The screen view of the form to be completed by the NHH customer



Completion of the form by the end customer

1. All sections except 1, 13 & 14 should be completed. It is possible to save the form and then for the end customer to share the 'url' with other colleagues, should multiple people be required to complete different parts of the form

2. Message received on 'save'

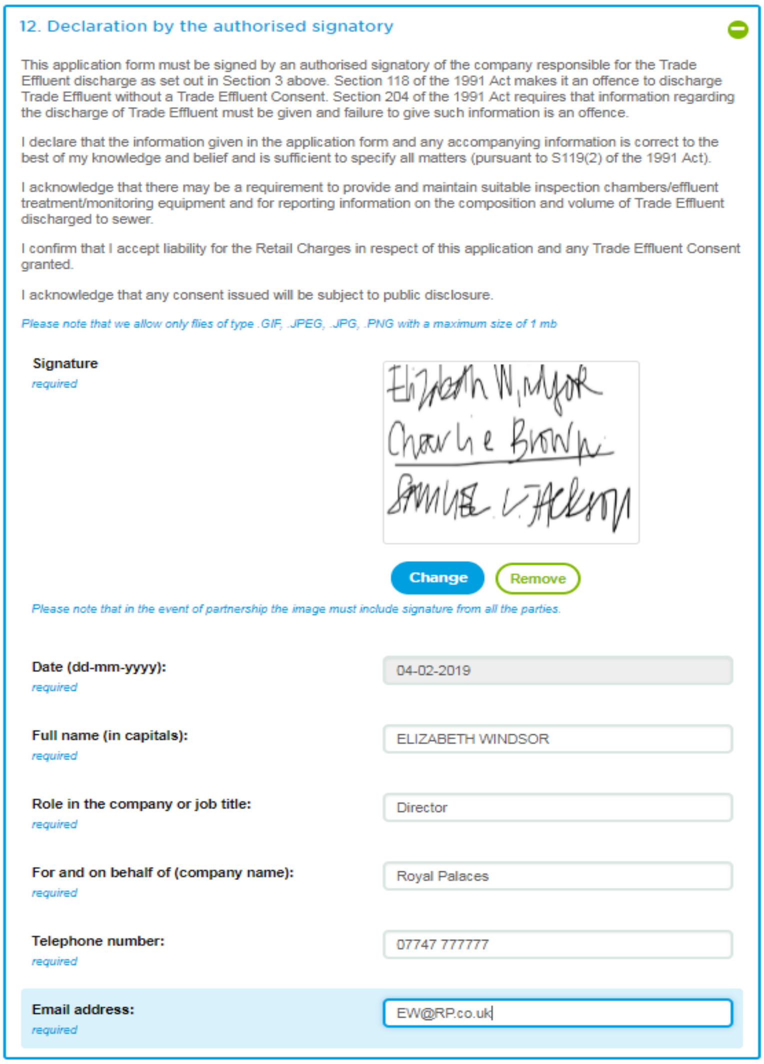

Message

Customer Data saved successfully. Please use the link provided in the original email to amend or submit to the retailer.

Please note that before submitting to the retailer you can share this form to another person in your organisation by sharing the link and the unique reference sent in the original email.

Ok

3. Section 12, 'Declaration by the authorised signatory' requires the end customer to upload an image of the authorised signatory or signatories. For multiple signatures, we require one image of these. See example below


12. Declaration by the authorised signatory

This application form must be signed by an authorised signatory of the company responsible for the Trade Effluent discharge as set out in Section 3 above. Section 118 of the 1991 Act makes it an offence to discharge Trade Effluent without a Trade Effluent Consent. Section 204 of the 1991 Act requires that information regarding the discharge of Trade Effluent must be given and failure to give such information is an offence.

I declare that the information given in the application form and any accompanying information is correct to the best of my knowledge and belief and is sufficient to specify all matters (pursuant to S119(2) of the 1991 Act).

I acknowledge that there may be a requirement to provide and maintain suitable inspection chambers/effluent treatment/monitoring equipment and for reporting information on the composition and volume of Trade Effluent discharged to sewer.

I confirm that I accept liability for the Retail Charges in respect of this application and any Trade Effluent Consent granted.

I acknowledge that any consent issued will be subject to public disclosure.

Please note that we allow only files of type .GIF, .JPEG, .JPG, .PNG with a maximum size of 1 mb

Signature *required*

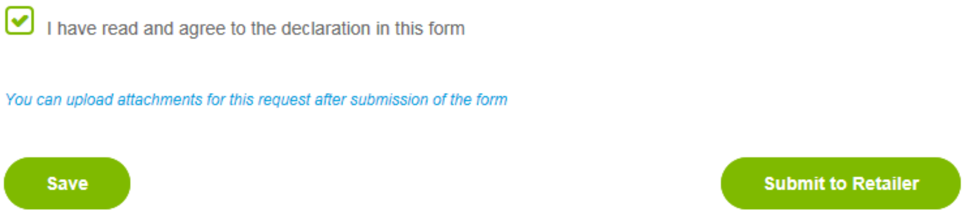
Change Remove

Please note that in the event of partnership the image must include signature from all the parties.

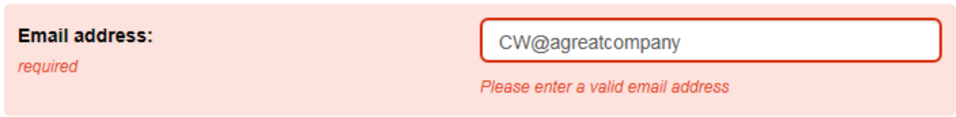
Date (dd-mm-yyyy): *required*	04-02-2019
Full name (in capitals): *required*	ELIZABETH WINDSOR
Role in the company or job title: *required*	Director
For and on behalf of (company name): *required*	Royal Palaces
Telephone number: *required*	07747 777777
Email address: *required*	EW@RP.co.uk

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

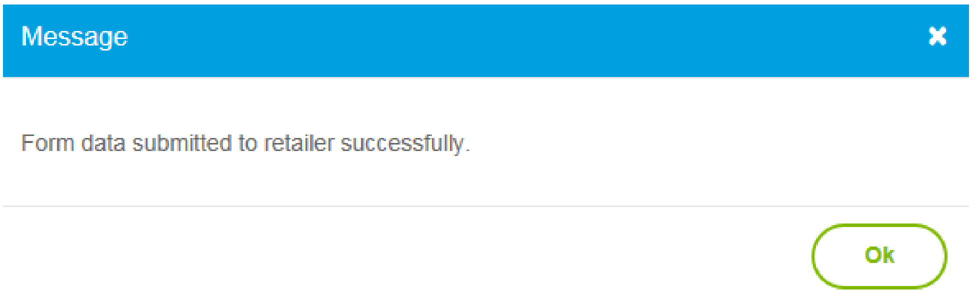
4. When the form is complete, they need to submit it to the Retailer by selecting the button at the foot of the form. They also need to select the I have read and agree to the declaration in this form box. Attachments can be added after the form has been submitted



5. Any mandatory fields that have not been completed or have not met the validation criteria will be highlighted when they select the 'Submit to Retailer' button



6. Amend then submit

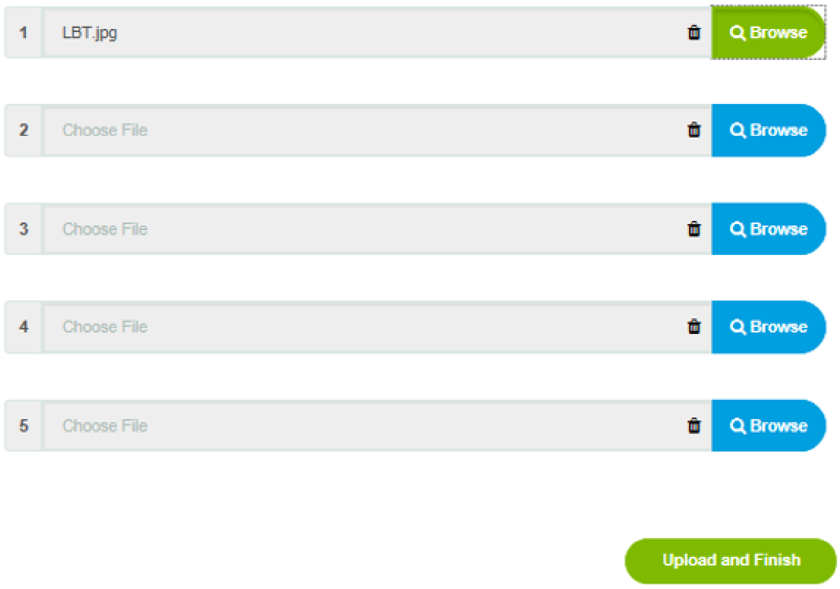


How to add attachments

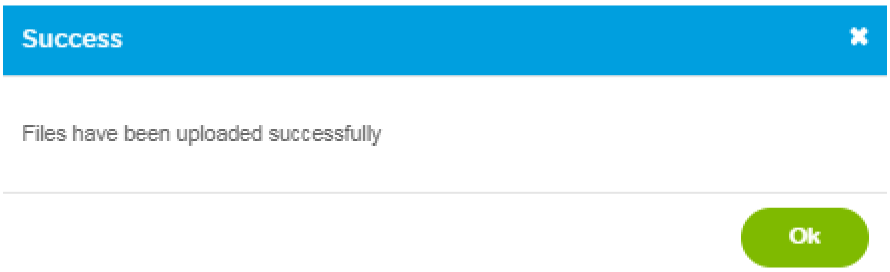
Note - Up to 5 attachments can be added to the G/02 & G/03 form and this will be done after the form has been submitted back to the Retailer.

Files are restricted to .pdf, .doc (x), .xls (x) & .jpeg and the maximum size for an individual file is 5 MB and the total for all files is 10 MB.

1. Click Finish if they have no attachments or Browse to select a document to upload
2. This document name will appear next to the document number 1 – 5. They can remove a file prior to uploading by selecting the icon.
3. When all the documents have been added, select Upload and Finish



4. Screen view acknowledgment received on successful upload of an attachment



5. Example of the email that is sent to the Retailer and copied to end customer when submitting attachments to a G/02 or G/03 form

****PLEASE DO NOT REPLY TO THIS MAIL****

Dear Retailer,

Your Customer, x has completed the relevant sections to proceed with a Trade Effluent application.

This email is to inform you that a new application for TW21226 is ready for submission via the Retailer Portal.

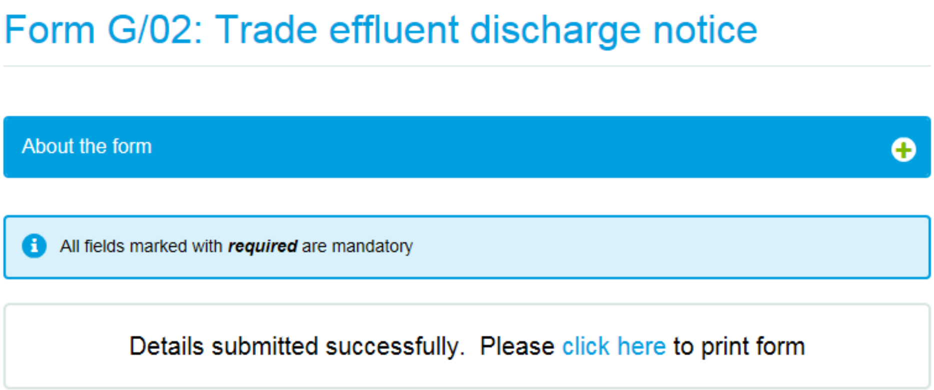
If the customer has provided any additional information, the attachments will be present in this email. Please ensure they are attached at the end of the submission process after uploading a signature.

A case reference number will be generated following submission once the case has been created in our internal systems. Please use this reference number for any further correspondence.

Regards,

Thames Water Trade Effluent Team

How to print a copy of the form



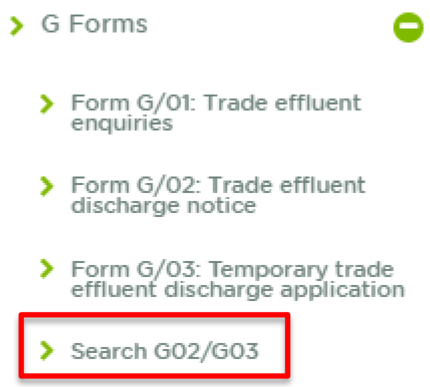
1. Click click here to open a copy of the form to print

Important - The form will show in a new tab in the web browser that the end customer is using. From here, they should print the form using an appropriate method e.g. right click on a mouse and select the print option.

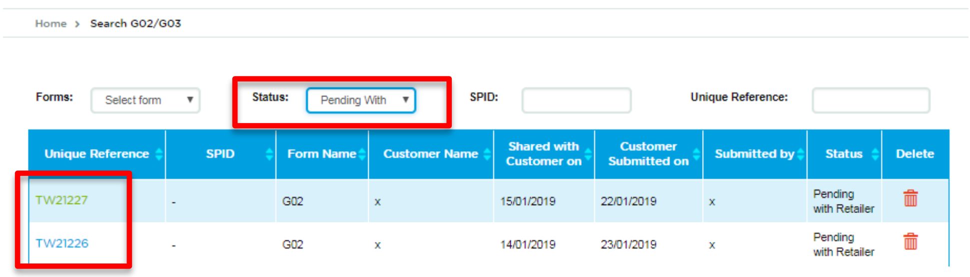
This is the only opportunity for the <u>customer</u> to print a copy of the form. You can print it at the end of the submission process should your customer require a copy.

What do you see when the form is sent back by the NHH customer?

1. Use the Search G02/G03 option in the G forms view



2. Select 'pending with retailer'



Important - Any attachments that the NHH customer has added will actually be emailed to the Retailer and not uploaded in the Portal. Therefore, it is the responsibility of the Retailer to upload these into the service request before submitting the form to Thames Water.

3. If necessary, use other filter options to lessen the view. The options are:

   - Forms – select form G02 or G03
   - Status – select 'Pending with Retailer' or 'Pending with Customer'
   - SPID – insert the SPID number
   - Unique Reference – insert the prefixed TW number

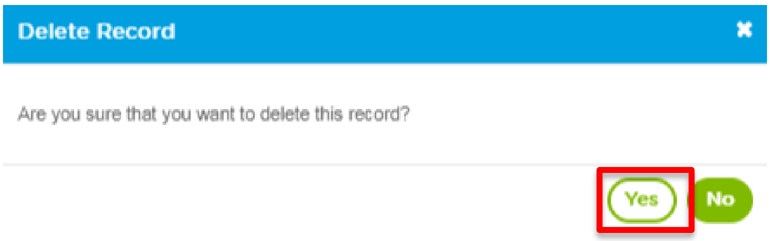
4. Click the unique reference number to display the form to complete the submission to Thames Water. The Retailer can view the whole form but is only able to edit the Retailer sections

5. Should the form require an update by the NHH customer, the form can be sent back using the same process that the form was sent in the first place. Communication of what is required would be needed by a separate email or telephone call

6. Once the form is ready to send, select submit to TW, add the attachments (remember these would have been emailed to you from the end customer) and select upload and finish as explained in exercise 3

7. The service request will then be allocated a WMST reference and the progress can be viewed in the 'Service Requests' section

8. If an application is no longer relevant, prior to submission you can delete using the option in the 'Search G02/G03' section and then selecting yes to the delete record prompt



Exercise 6: How to search for existing service requests

Business scenario

You are already logged into the Portal and would like to view a list of all service requests for your company.

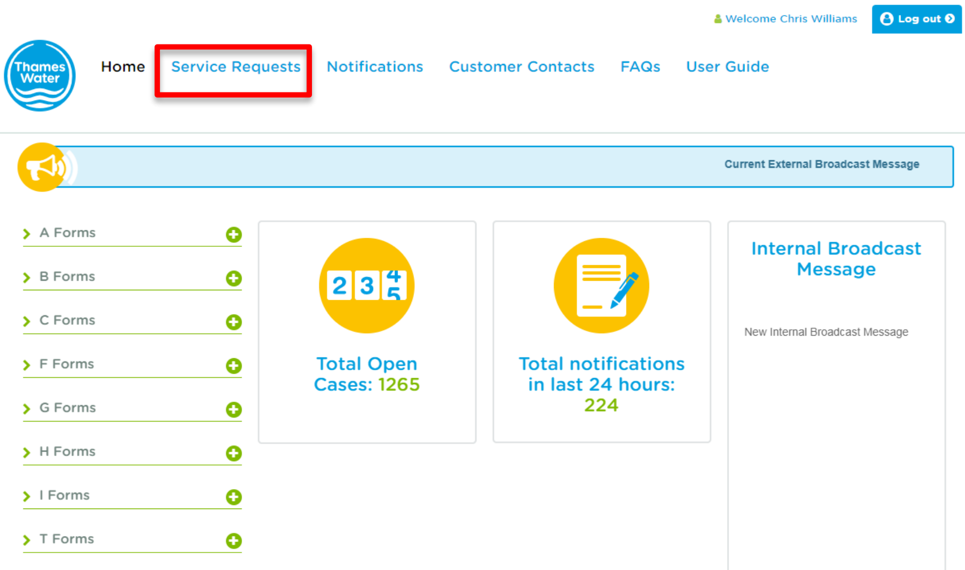
Learning outcome

By the end of this exercise you will be able to view a list of service requests for your company.

Steps

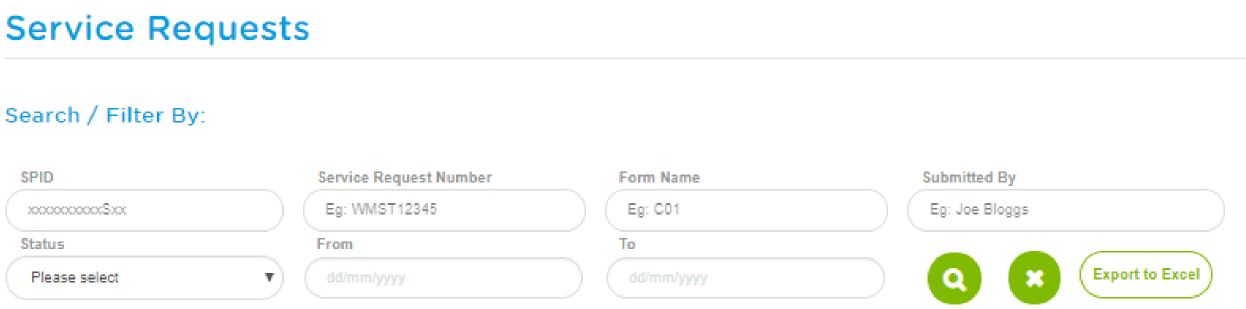
Searching for existing Service Requests

1. The landing page will be displayed



2. Click Service Requests or you can alternatively click on  from the landing page

3. The Service Requests screen will be displayed



4. Click SPID

Note - All filters displayed can be used to search for a service request. You can also just type in part of the name.

- SPID
- Service Request Number
- Form Name
- Submitted By
- Status
- From
- To

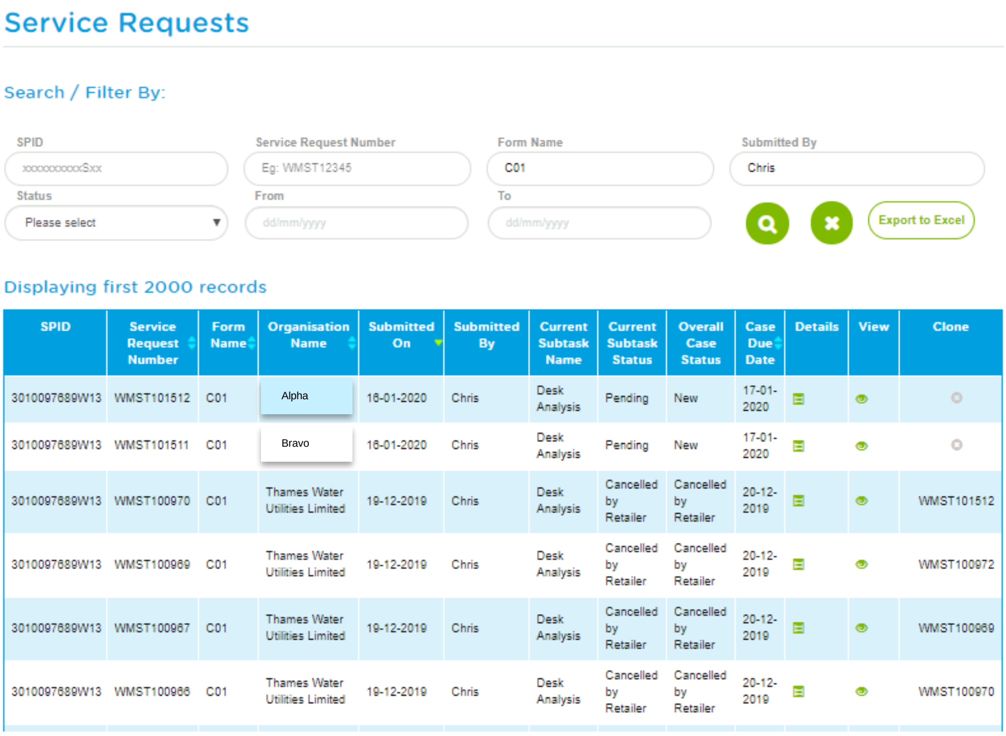
You can also use multiple filters at the same time. There is also the functionality to export the data to excel using the button Export to Excel

The information available is:

- SPID
- Service request number
- Form name
- Organisation name
- Submitted on date
- Submitted by
- Current subtask name
- Current subtask status
- Overall case status
- Case due date
- Details
- View
- Clone

5. Type in the details you are searching on and click on the magnifying glass to action the search

6. The Service Requests screen will be updated with matches



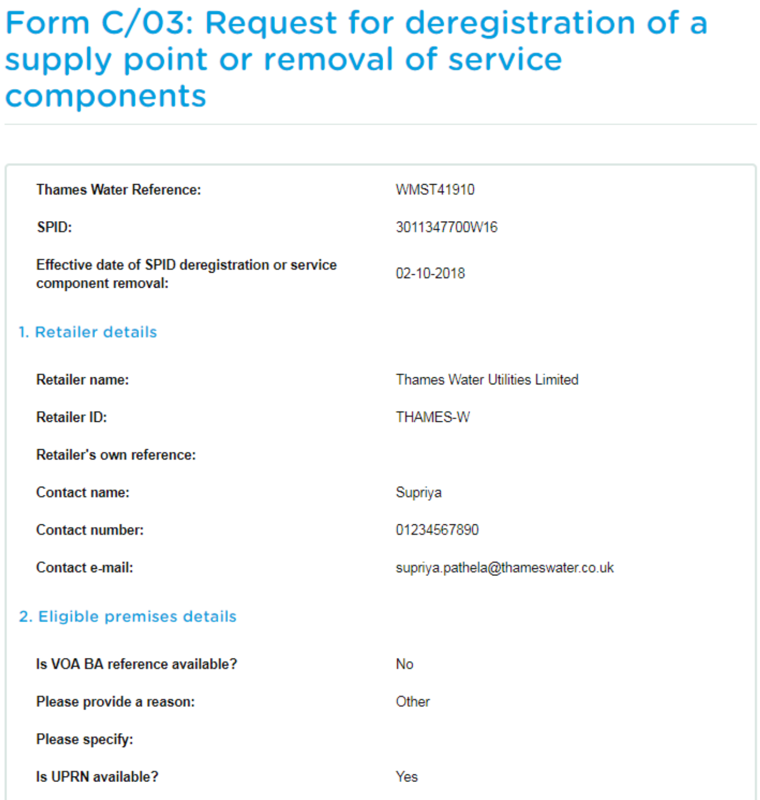
SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
3010097689W13	WMST101512	C01	Alpha	16-01-2020	Chris	Desk Analysis	Pending	New	17-01-2020			
3010097689W13	WMST101511	C01	Bravo	16-01-2020	Chris	Desk Analysis	Pending	New	17-01-2020			
3010097689W13	WMST100970	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST101512
3010097689W13	WMST100969	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100972
3010097689W13	WMST100967	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100969
3010097689W13	WMST100966	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100970

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

How to view the existing Service Request form

1. Click in the 'View' column

2. The form will be displayed in a new tab



Form C/03: Request for deregistration of a supply point or removal of service components

Thames Water Reference:	WMST41910
SPID:	3011347700W16
Effective date of SPID deregistration or service component removal:	02-10-2018

1. Retailer details

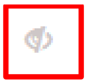
Retailer name:	Thames Water Utilities Limited
Retailer ID:	THAMES-W
Retailer's own reference:	
Contact name:	Supriya
Contact number:	01234567890
Contact e-mail:	supriya.pathela@thameswater.co.uk

2. Eligible premises details

Is VOA BA reference available?	No
Please provide a reason:	Other
Please specify:	
Is UPRN available?	Yes

Note - Any requests that were previously received by other means will be displayed although you will not be able to view the form. The view icon will be grey rather than green.

You can, however, still see the history of the case.



3. Click to close the tab or Click **Home** to return to the landing page.

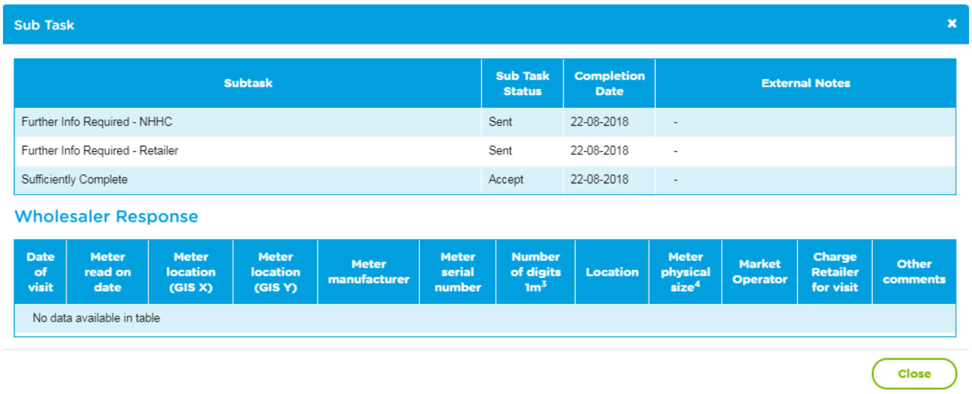
What's available from the 'Details' icon?

1. Click to view the history of a case. Click or Close to return to the service request page.

The purpose of sharing this information is to reduce the need for a Retailer to contact Thames Water as they can see for themselves the current status of a case.

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

Example of the details view for C01 cases



Sub Task

Subtask	Sub Task Status	Completion Date	External Notes
Further Info Required - NHHC	Sent	22-08-2018	-
Further Info Required - Retailer	Sent	22-08-2018	-
Sufficiently Complete	Accept	22-08-2018	-

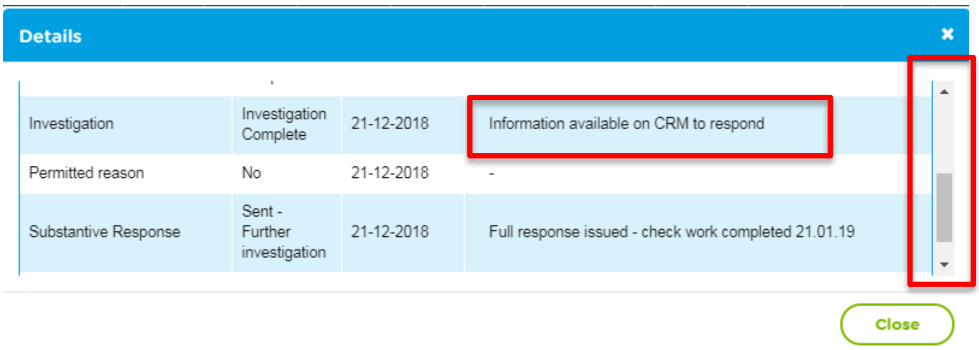
Wholesaler Response

Date of visit	Meter read on date	Meter location (GIS X)	Meter location (GIS Y)	Meter manufacturer	Meter serial number	Number of digits 1m³	Location	Meter physical size⁴	Market Operator	Charge Retailer for visit	Other comments
No data available in table											

Close

Example of the details view for other cases

Use the slider to view the subtasks completed for a case and any applicable notes



Details

Investigation	Investigation Complete	21-12-2018	Information available on CRM to respond
Permitted reason	No	21-12-2018	-
Substantive Response	Sent - Further investigation	21-12-2018	Full response issued - check work completed 21.01.19

Close

Exercise 7: Resubmit request using the clone functionality

Business scenario

Important - This facility is only available for service requests that were initially submitted via the Portal and have subsequently been cancelled or rejected. Completed cases do not have the clone function available.

The clone request was removed for C01 requests when the Central Bilateral Hub opened on 22 September 2021. Any rejected/cancelled C01 forms received prior to 22 September, must be resubmitted via the Central Bilateral Hub

If you change the SPID on a cloned case, the form will be wiped. Therefore, you can only clone and submit a form with the same SPID.

You wish to resubmit a request that was previously cancelled or rejected. You are already logged into the Portal and have located the previous case in the 'Service Request' view – see exercise 6.

Note – Previously the 'Current Subtask Status' did not update when a case was rejected or cancelled. This has been changed for new cases as well as updating cases previously rejected or cancelled.

Before

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View
3010147279W13	WMST129710	B01	Alpha	09-01-2020	Deepak Bajaj	Survey Appointment booked	Pending	Cancelled by Retailer	10-02-2020		

After

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
3010097689W13	WMST100970	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			

Learning outcome

By the end of this exercise you will be able to resubmit a case using the clone functionality.

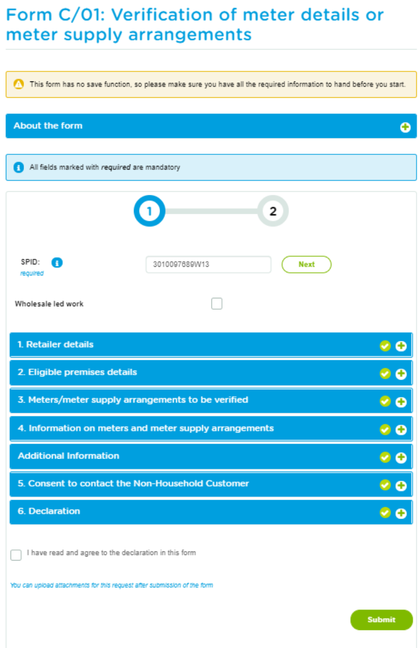
Steps

Non 'Trade Effluent' - Identify the case in the Service Requests view

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
3010097689W13	WMST100970	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			

1. If the green tick exists in the 'Clone' column, then the case can be cloned

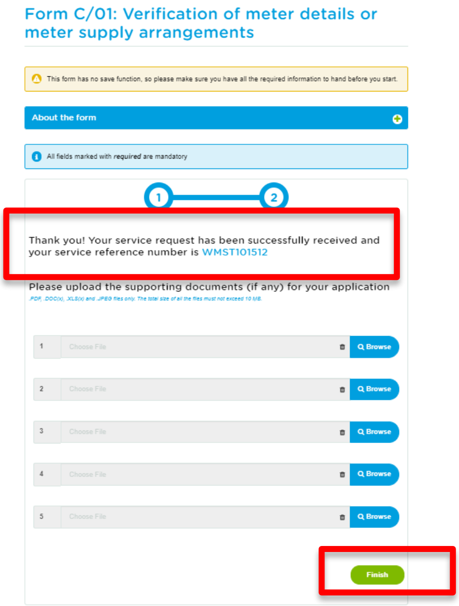
2. Click on the , which will create a copy of the form in the 'Forms' section of the Portal



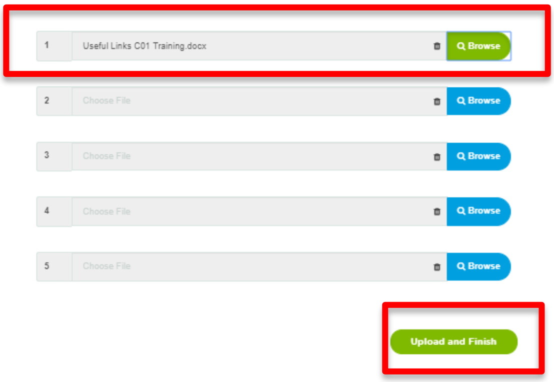
Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

3. Edit the fields that require additional information or if you only need to attach further documentation to the request, select the I have read and agree to the declaration in this form and Submit

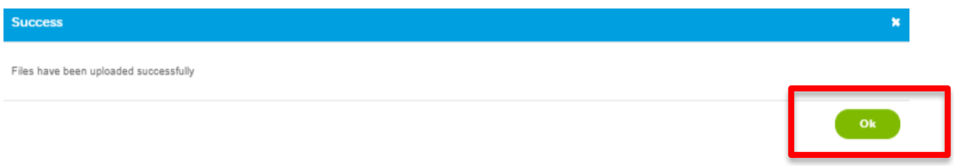
4. The new service request number will be confirmed to you and an email will also be sent confirming receipt and the number



5. Either finish (as above) or add any attachments and then upload and finish (as below)



6. You will see confirmation that the case has been uploaded successfully – select Ok to return to the from screen



7. In the Service request view, the new SPID will show as submitted. The previous service request, will no longer have the 'Clone' option available and will instead, show the new service case number in the 'Clone' column

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
3010097689W13	WMST101512	C01	Thames Water Utilities Limited	16-01-2020	Chris	Desk Analysis	Pending	New	17-01-2020			

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
3010097689W13	WMST100970	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST101512

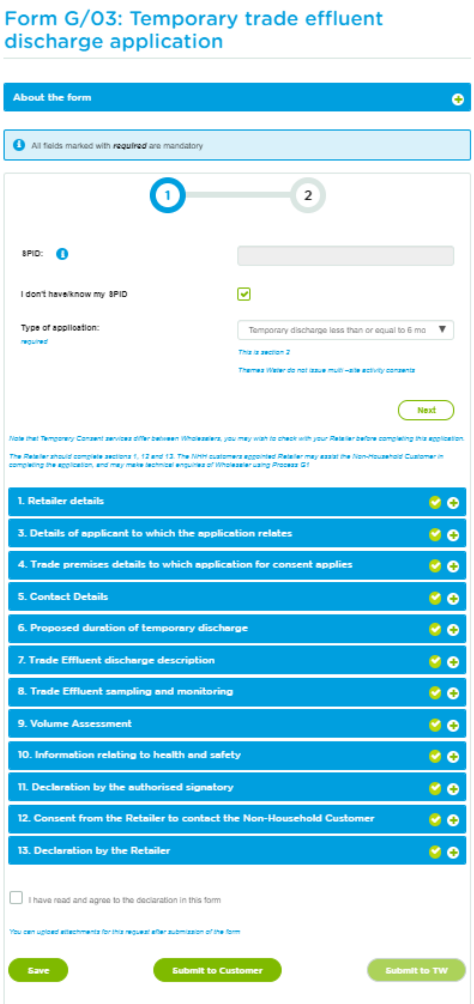
Trade effluent - Identify the case in the Service Requests view

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
-	WMST100944	G03	Thames Water Utilities Limited	18-12-2019	Chris	Sufficiently Complete	Reject	Cancelled by Retailer	16-02-2020			

1. If the green tick exists in the 'Clone' column, then the case can be cloned
2. Click on the , which will create a copy of the form in the 'Forms' section of the Portal.

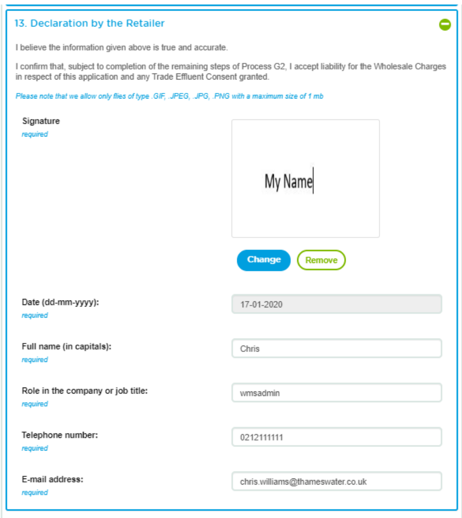
Note – If you change the type of request from the original, the form will be wiped clean e.g. G02 initial request was a) and then you amend to b)

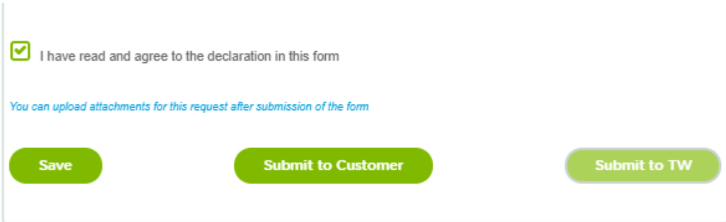
Please select
a) Proposed discharge for which no consent exists
b) Variation to an existing consent
c) Change of occupier at the consented premises(this includes any change in legal identity of the company)
d) Change of legal company name at the consented premises, where Companies House registration number remains the same
g) Termination of consent(i.e.discharge has permanently ceased or occupier has moved off the premises)



Note - The signature data is not cloned into the new request. Therefore, both you and the end customer will need to insert signatures before submitting the case. This is the same for attachments as well, so all attachments sent previously must be attached again.

3. Add your signature to section 13, Declaration by the Retailer





4. Select the ☐ I have read and agree to the declaration in this form and then either Save or Submit to customer.

Note – the submission follows exactly the process explained in Exercise 5 of this document.

5. Until the form is returned by the customer and ready to be submitted back to Thames Water, in the Service request view, the previous service request, will no longer have the 'Clone' option available. Instead, it will show the new temporary reference number (the unique reference in the Search G02/G03 view) in the 'Clone' column

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
-	WMST100944	G03	Thames Water Utilities Limited	18-12-2019	Chris	Sufficiently Complete	Reject	Cancelled by Retailer	16-02-2020			TW311225

Search G02/G03 view

Home > Search G02/G03

Forms: Select form ▼ Status: Select Statu ▼ SPID: Unique Reference:

Unique Reference	SPID	Form Name	Customer Name	Shared with Customer on	Customer Submitted on	Submitted by	Status	Delete
TW311225	-	G03	-	17/01/2020	18/12/2019	Chris	Pending with Customer	

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

6. When the form is resubmitted to Thames Water, the Clone view on the original case will change to the new service request number

SPID	Service Request Number	Form Name	Organisation Name	Submitted On	Submitted By	Current Subtask Name	Current Subtask Status	Overall Case Status	Case Due Date	Details	View	Clone
-	WMST100944	G03	Thames Water Utilities Limited	18-12-2019	Chris	Sufficiently Complete	Reject	Cancelled by Retailer	16-02-2020			WMST101538

Why can't I clone a service request?

- The original request was not submitted by the retailer using the online Portal (excel form version)
- The original retailer was different from the current retailer
- The case has not been rejected or cancelled by Thames Water
- The case has already been cloned

Exercise 8: View notifications

Business scenario

You are already logged into the Portal and would like to view a list of all notifications sent to your company.

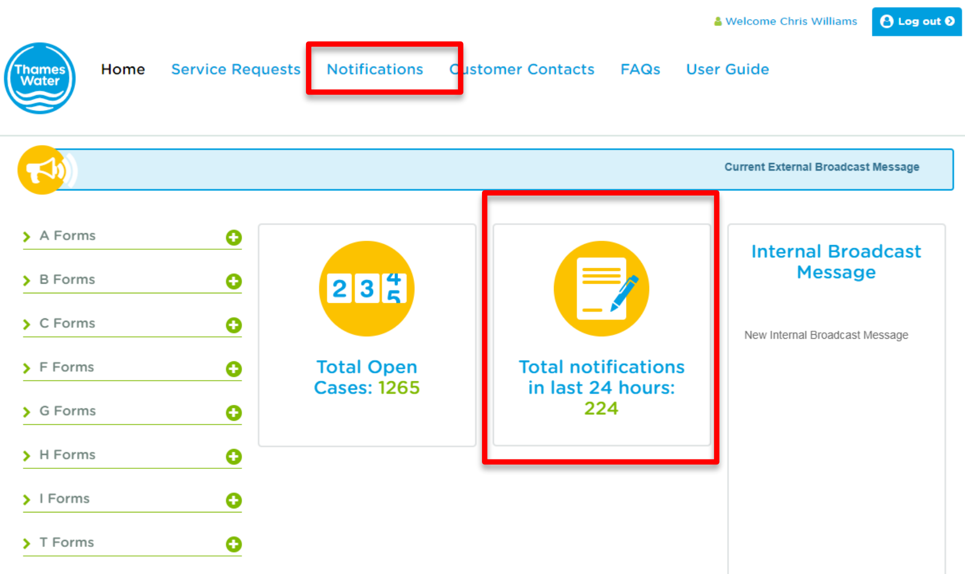
Learning outcome

By the end of this exercise you will be able to view a list of service requests for your company.

Steps

View notifications sent by Thames Water

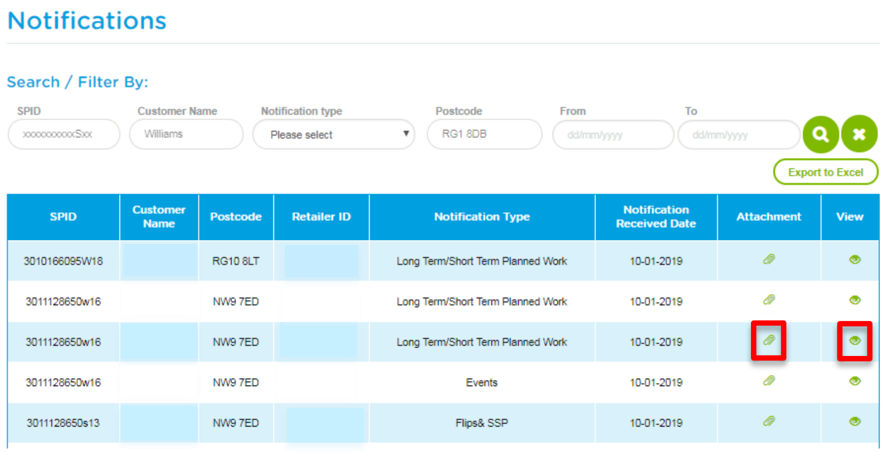
1. The landing page will be displayed



2. Click Notifications or select the 'Total notifications in last 24 hours' icon. This is where you will be alerted to any recent notifications added to the Portal

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

3. The notifications view will be displayed for your company



Note - All search options require you to select the search button after selecting your choice.

The search options are as follows and you can enter multiple search options in one search e.g. Customer Name and Notification type

- SPID
- Customer Name
- Notification type (see options below)
- Postcode
- From date
- To date

Notification type options

Please select
Appointments
Customer Complaints
Customers Contacts
Events
Flips& SSP
Follow On
LCE / CUFIS
Long Term/Short Term Planned Work
Metering B5
Metering B10
Miscellaneous
Neighbouring Properties
Reactive Visit Complete
Section Notices
Trade Effluent
Un-attributable

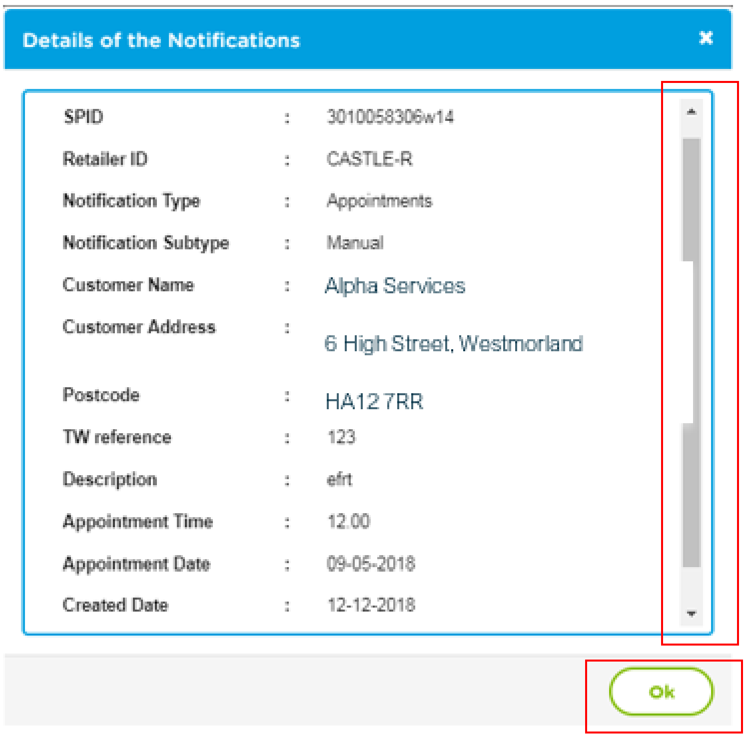
There is also the functionality to export the data to excel using the button Export to Excel below the search / clear search icons

The information available is:

- SPID
- Customer Name
- Postcode
- Retailer ID
- Notification type
- Notification Received Date
- Attachment
- View

4. Click the attachment icon to get any files relevant to the notification and the view icon to get details of the notification sent

5. 'View' screenshot – use the slider to see more data and ok to close the view



6. Click additional pages at the foot of the screen to see further notifications as only 10 are shown per page

7. How to view additional notifications

Exercise 9: Send notifications

Business scenario

You are a Thames Water user, already logged into the Portal and would like to send a notification to a Retailer.

Note - You require the SPID to use this application therefore if you do not have a SPID or it is unknown, you will need to send a notification by another means.

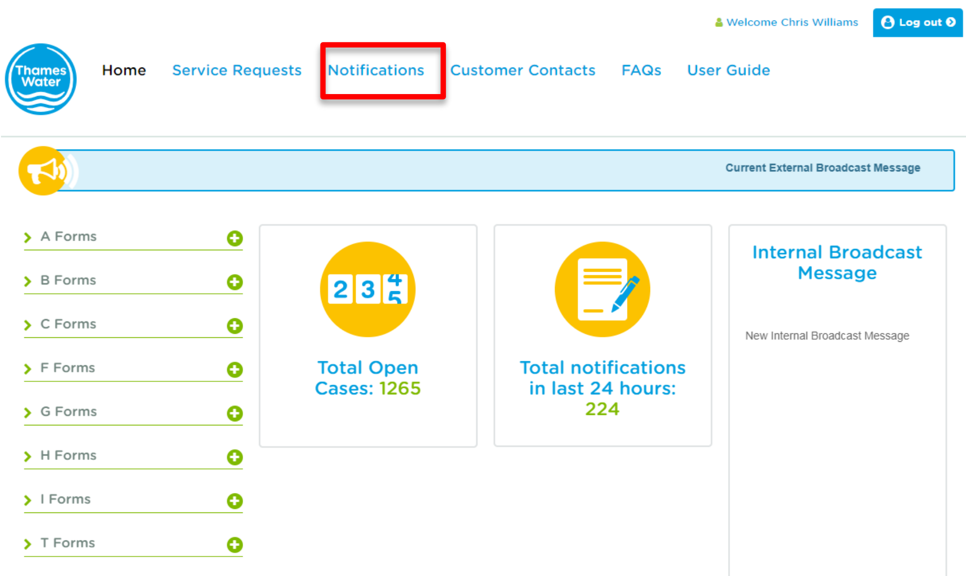
Learning outcome

By the end of this exercise you will be able to send notifications to a Retailer.

Steps

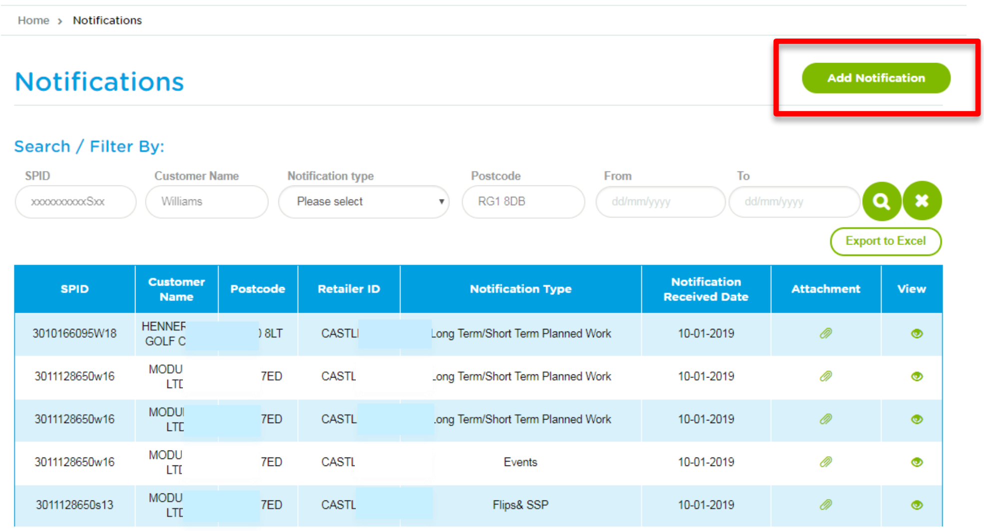
Adding a notification to be sent to a Retailer

1. The landing page will be displayed



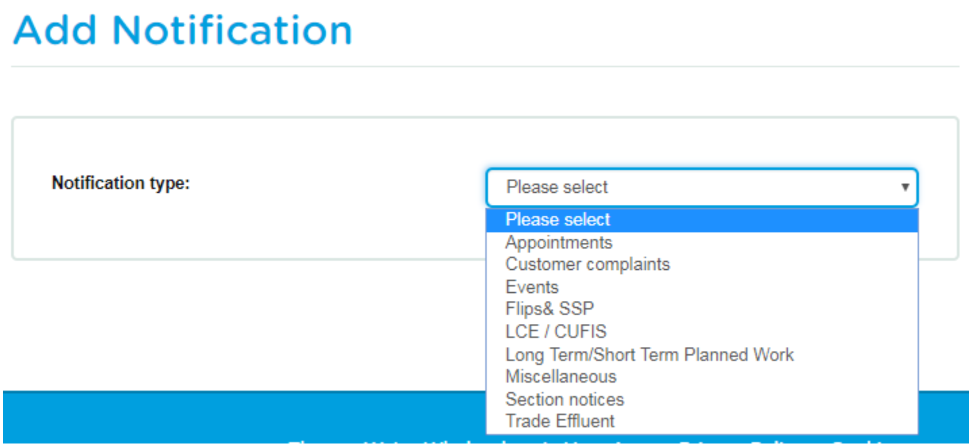
2. Click Notifications

3. The Notifications view will be displayed



4. Click **Add Notification**

5. Select the 'Notification type' from the following options

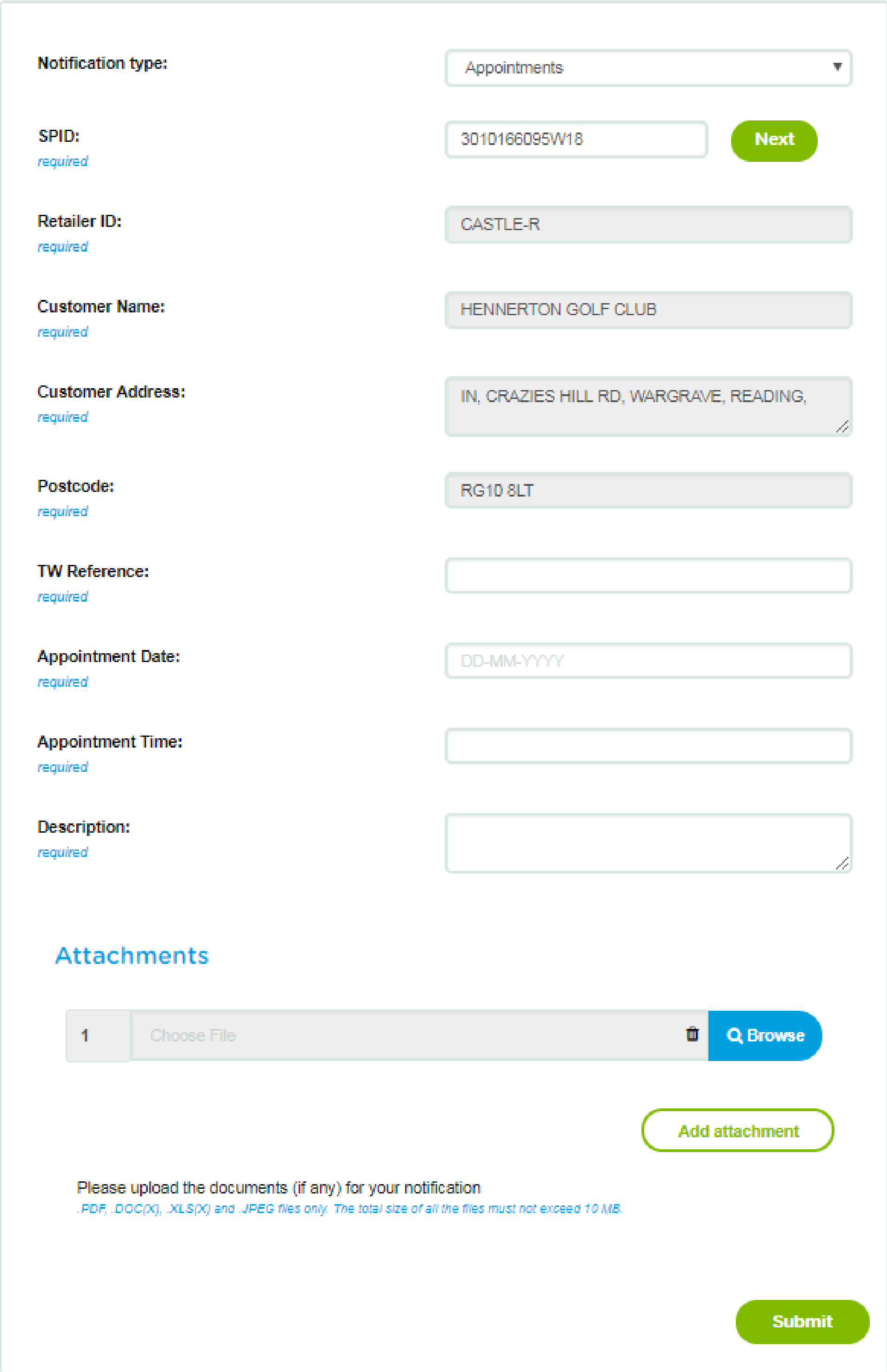


6. Type in one SPID impacted by the notification. Any further SPIDS impacted can be referenced in a document as an attachment to the notification. Select **Next**, this will pre-populate some of the required fields

7. Remember, if you do not have the SPID or it is unknown, you cannot use this application to send a notification

8. The Add Notification screen after selecting next

Add Notification



Notification type: Appointments

SPID: required 3010166095W18 Next

Retailer ID: required CASTLE-R

Customer Name: required HENNERTON GOLF CLUB

Customer Address: required IN, CRAZIES HILL RD, WARGRAVE, READING,

Postcode: required RG10 8LT

TW Reference: required

Appointment Date: required DD-MM-YYYY

Appointment Time: required

Description: required

Attachments

1 Choose File Browse

Add attachment

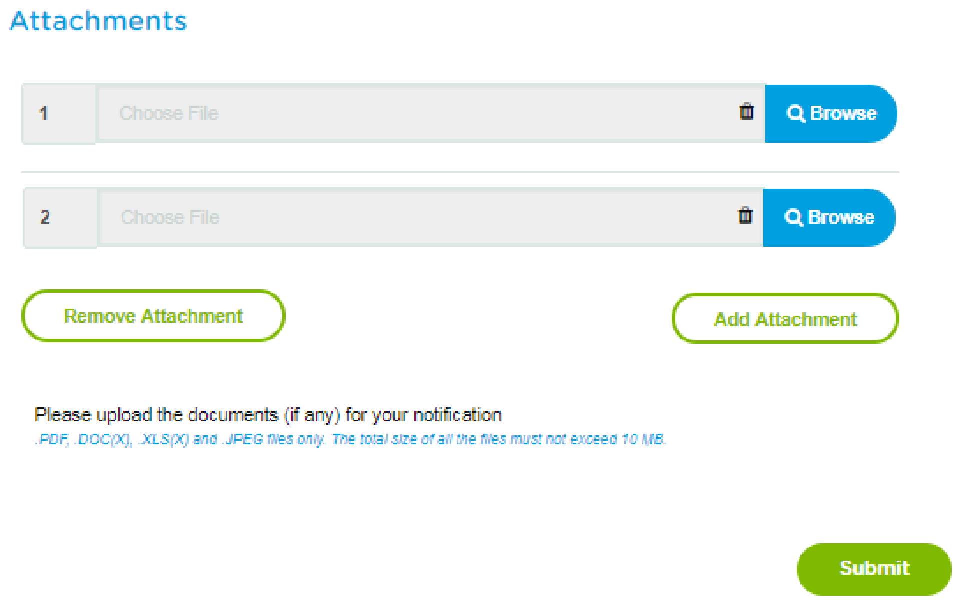
Please upload the documents (if any) for your notification

.PDF, .DOC(X), .XLS(X) and .JPEG files only. The total size of all the files must not exceed 10 MB.

Submit

9. Add any further required information and upload any relevant documents such as a list of other SPIDS impacted. Select Submit to publish the notification

Note - You can remove attachments if added in error. You can add a maximum of 3 attachments



Exercise 10: View Customer Contacts

Business scenario

You are already logged into the Portal and would like to view a list of all customer contact requests for your company. These may be individual requests or bulk requests.

This situation may occur when Thames Water want to keep an end customer informed of progress of an incident and we don't have current contact details on our records. An example would be an event such as a burst water main.

Learning outcome

By the end of this exercise you will be able to view a list of customer contact requests made to your company to provide the details as required.

Steps

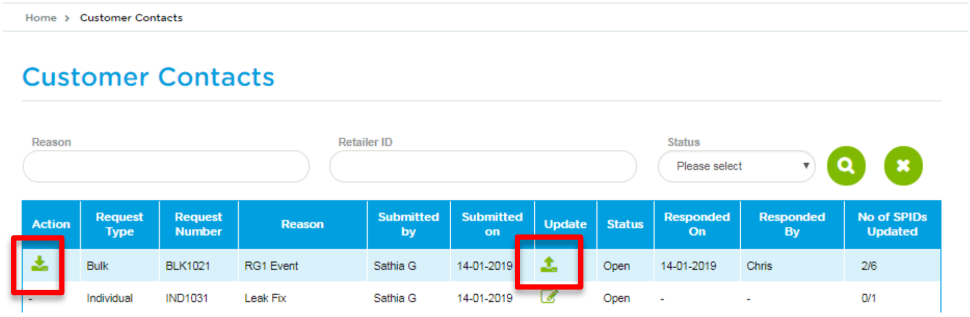
Searching for existing customer contact requests to action

1. From the landing page select Customer Contacts

2. Action – bulk requests

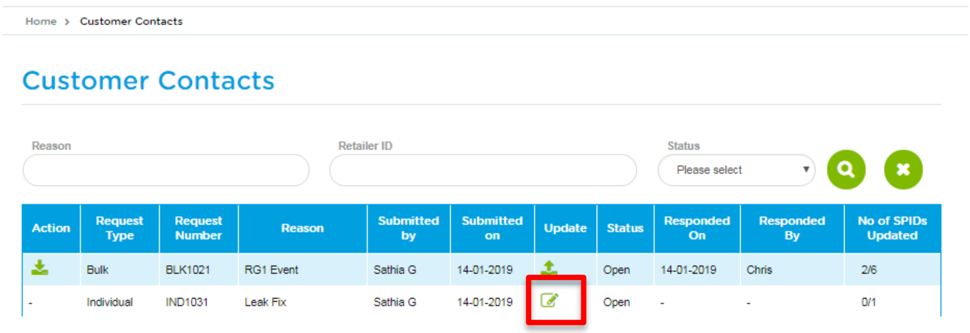
Download the file with multiple customer contact request for your company. Update the spreadsheet with appropriate actions and save file locally to then upload using 'Update' icon to the Portal

3. This is a view of the Customer Contacts page

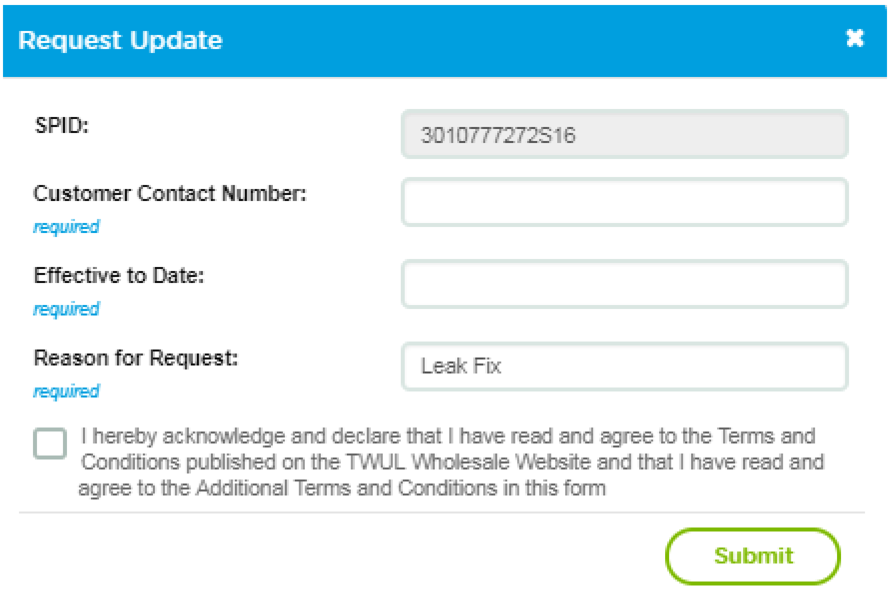


4. Action – individual requests

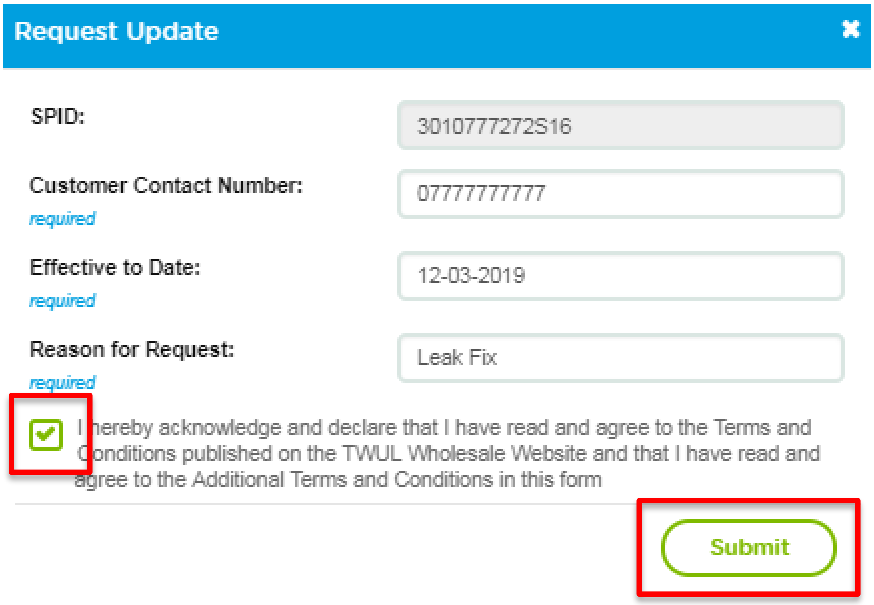
View the request for your company by selecting the 'Update' icon . Update the request with appropriate actions and submit the data – see below

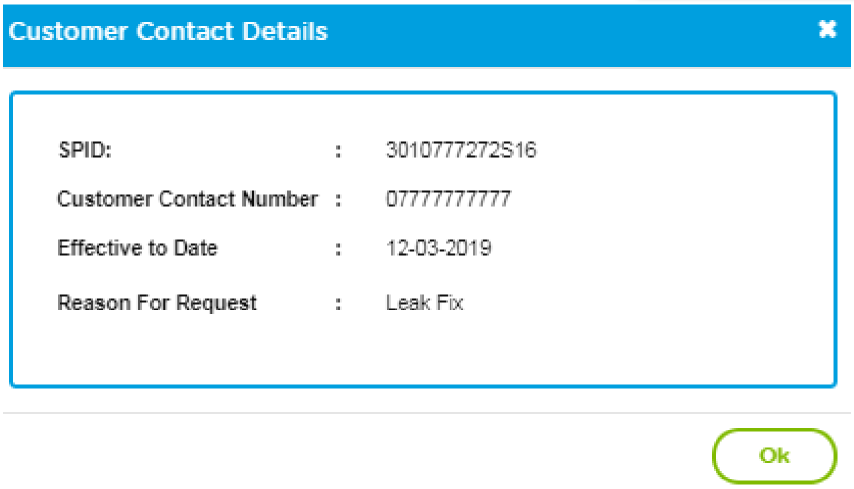


Individual request received by Retailer



Individual request updated by Retailer



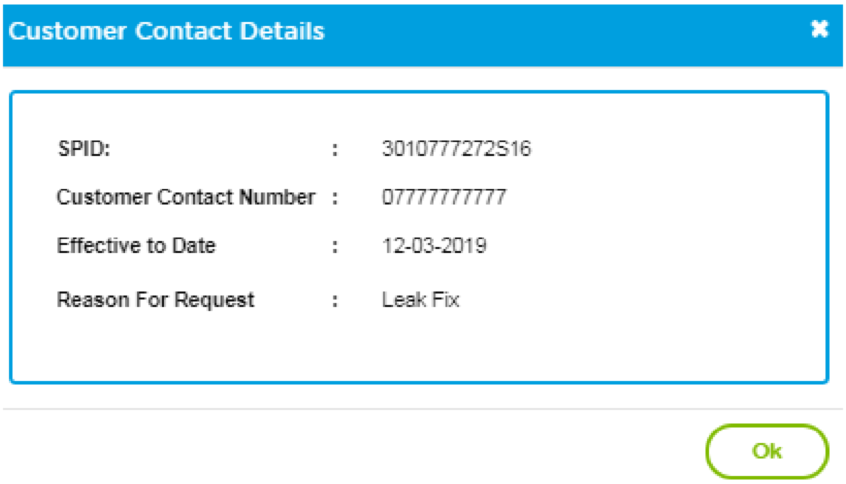


Individual request updated (Portal view)

Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
-	Individual	IND1031	Leak Fix	Sathia G	14-01-2019		Closed	14-01-2019	Chris	1/1

Click to see the completed 'Customer Contact Details'

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021



Exercise 11: Send Customer Contacts

Business scenario

You are a Thames Water user and already logged into the Portal. You would like to send a request for end customer contact details to a Retailer or to multiple Retailers.

This situation may occur when we want to keep an end customer informed of progress of an incident and we don't have current contact details on our records. An example would be an event such as a burst water main.

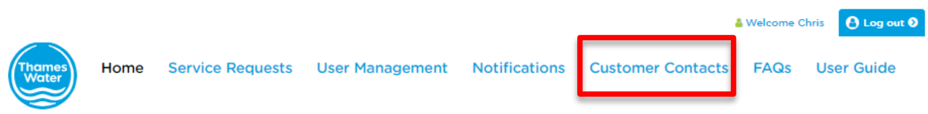
Learning outcome

By the end of this exercise you will be able to send a customer contact request to one or multiple Retailers.

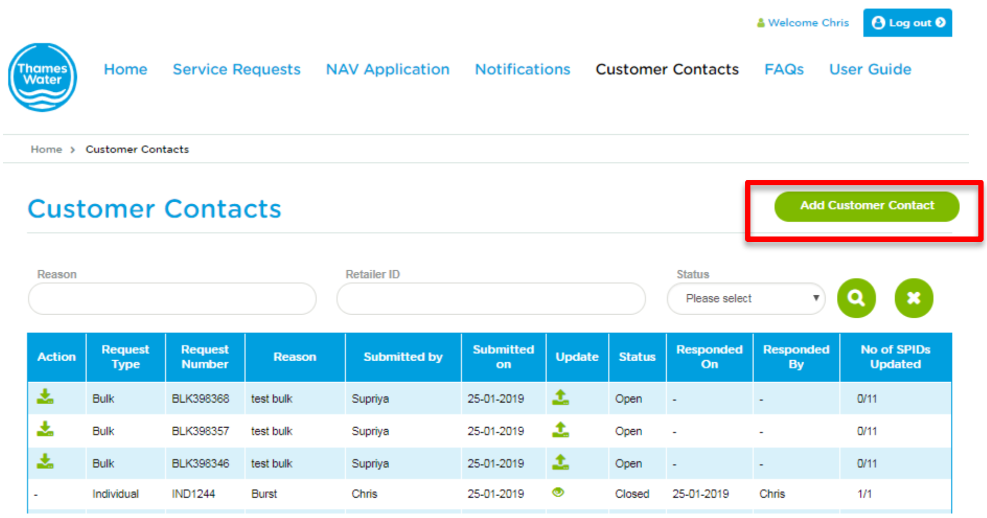
Steps

Sending a customer contact request to one or multiple Retailers

1. From the landing page select Customer Contacts

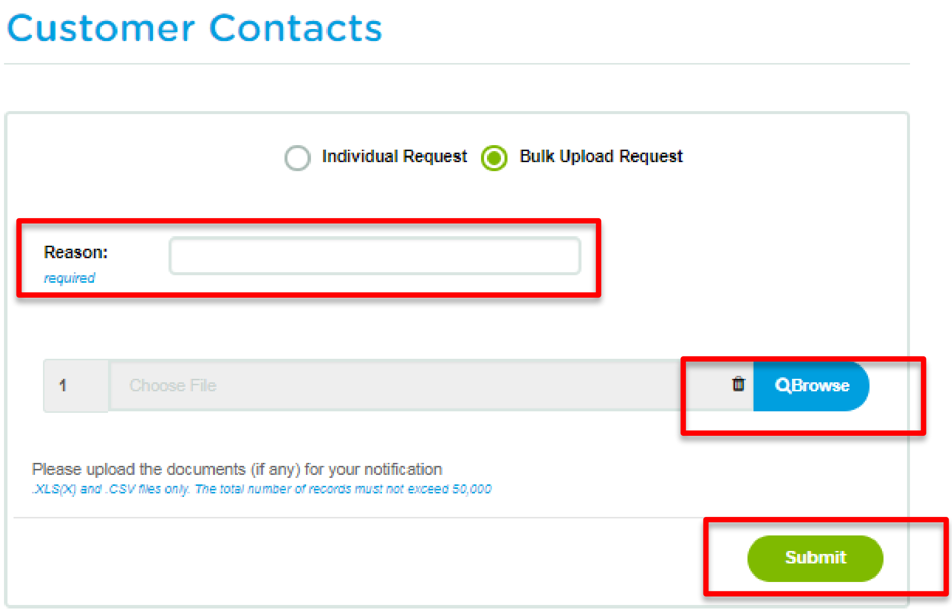


Customer Contact view



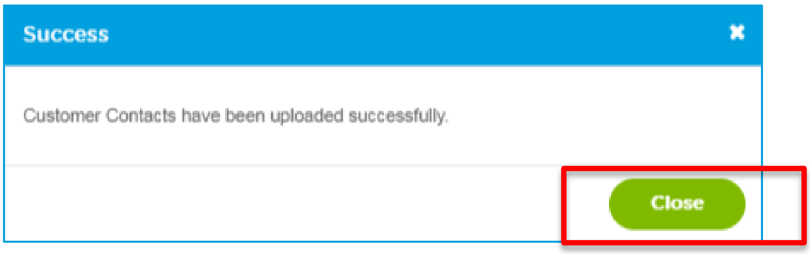
Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
	Bulk	BLK398368	test bulk	Supriya	25-01-2019		Open	-	-	0/11
	Bulk	BLK398357	test bulk	Supriya	25-01-2019		Open	-	-	0/11
	Bulk	BLK398346	test bulk	Supriya	25-01-2019		Open	-	-	0/11
-	Individual	IND1244	Burst	Chris	25-01-2019		Closed	25-01-2019	Chris	1/1

2. Bulk requests - Click on Add Customer Contact and select the Bulk Upload Request option



3. Enter the reason for the request and then upload the .XLS (X) or .CSV file with all the premises and their SPID's that the contact details are required for. It is likely that you will obtain this data from DMS UI.

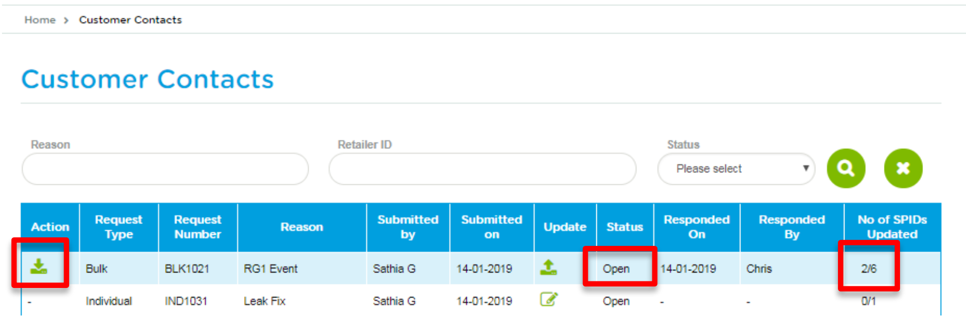
4. Click Submit. This will publish the request that will be visible by the retailer and you will receive the following confirmation message. Click 'close'



Note - The spreadsheet you have uploaded may contain data for multiple Retailers. The system will automatically sort these and send each Retailer an individual bulk request for the SPID's that they are the Retailer for.

What do we see when a Retailer responds?

1. This is a view of the Customer Contacts page

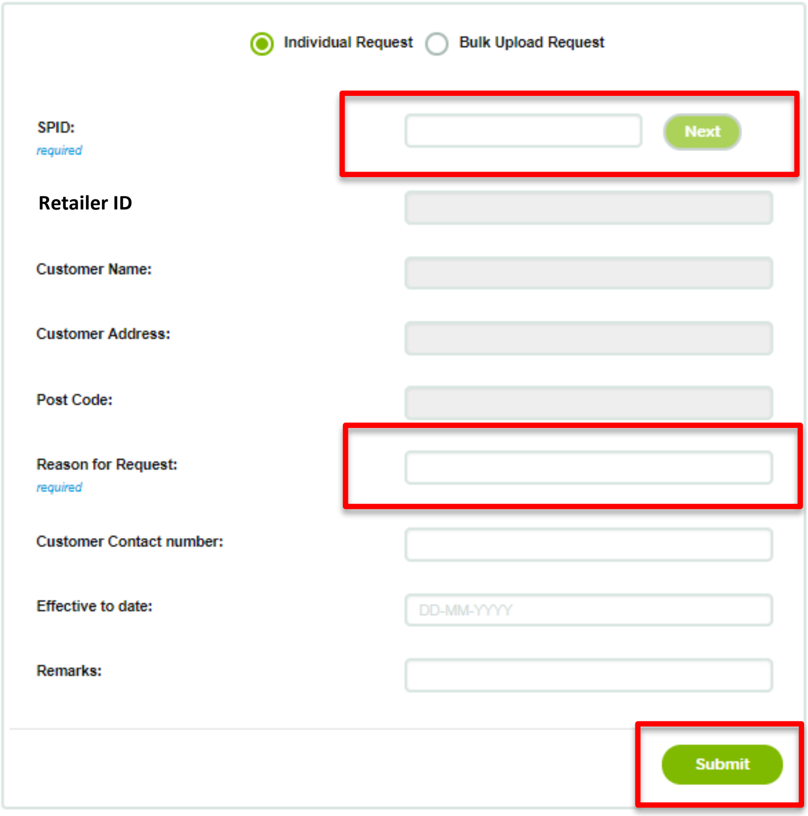


2. The Retailer can provide details for all or some of the SPIDs requested. The 'Status' should remain 'Open' until all responses have been sent by the Retailer. The 'No of SPIDs Updated' will reflect how many of the SPID's that contact details have been request for have actually been provided. In the example above 2/6 have been sent

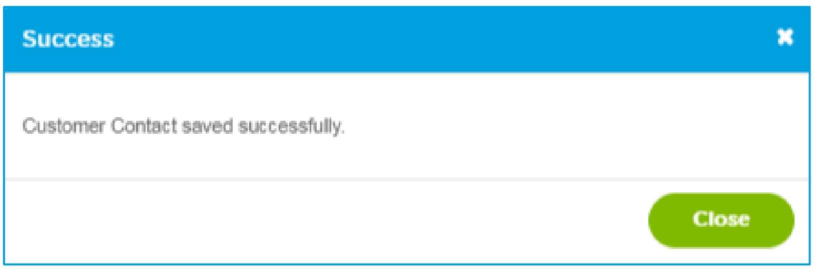
3. Click to download the spreadsheet to see what information has been sent

Note - Once the status is changed to closed, the contact details provided will be transferred to DMS and the entry in the Portal will be deleted after 7 days.

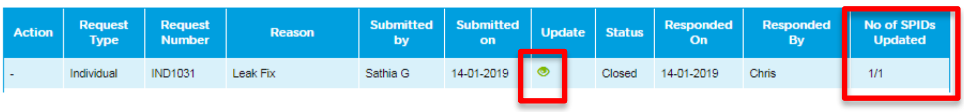
4. Individual requests - Click on Add Customer Contact and select the Individual Request option



5. Enter the SPID and select 'Next'. This will pre populate the shaded fields. Enter the reason for the request and then select 'Submit'. This will publish the request that will be visible by the retailer and you will receive the following confirmation message. Click 'close'

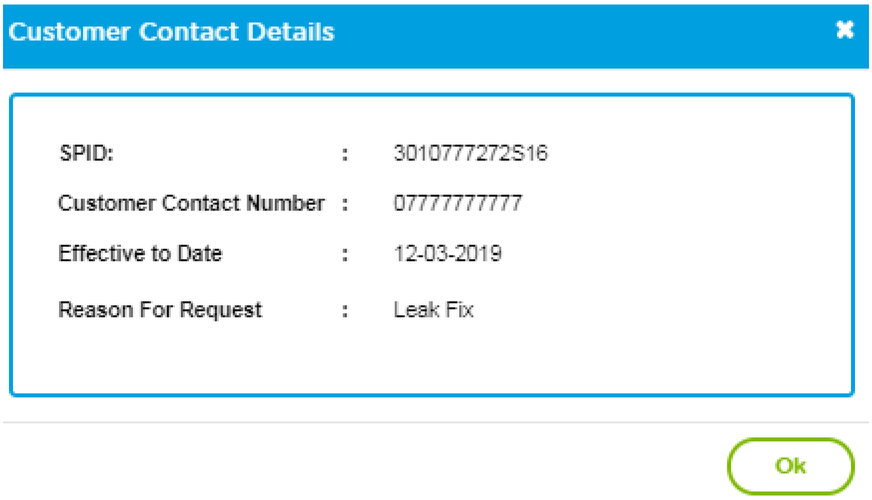


Individual request updated (Portal view)



Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
-	Individual	IND1031	Leak Fix	Sathia G	14-01-2019		Closed	14-01-2019	Chris	1/1

The view



When the Retailer has provided the details, the status field will be 'Closed', the 'No of SPIDs Updated' will be 1/1.

Click to see the completed 'Customer Contact Details'

Note - Once the status is changed to closed, the contact details provided will be transferred to DMS and the entry in the Portal will be deleted after 7 days.

Exercise 12: User management

Business scenario

You are already logged into the Portal, and as an Administrator you would like to create a new user or update/delete an existing user from your company.

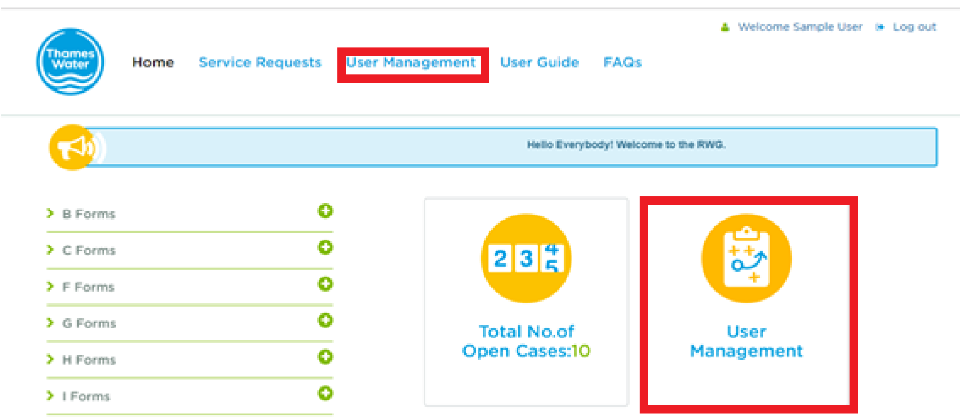
Learning outcome

By the end of this exercise you will be able to create a new user and to update or delete an existing user in the Portal.

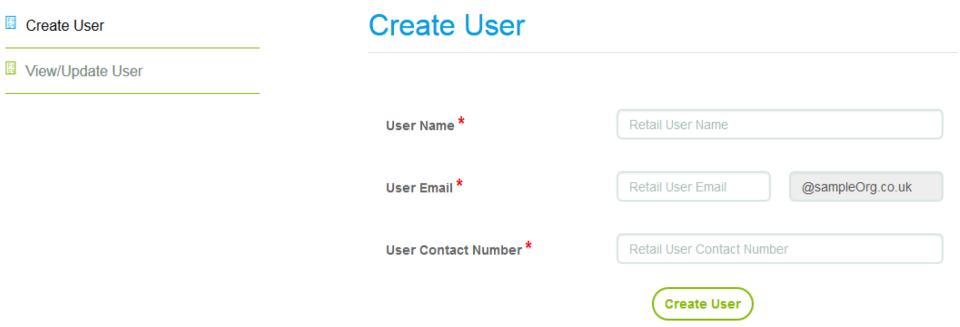
Steps

How to create a new user

1. The landing page will be displayed



2. Click User Management - The User Management Create User screen will be displayed



3. Click User Name *

4. Type in the **first name** and **surname** of the new user required, e.g. **Jo Bloggs**

5. Click User Email *

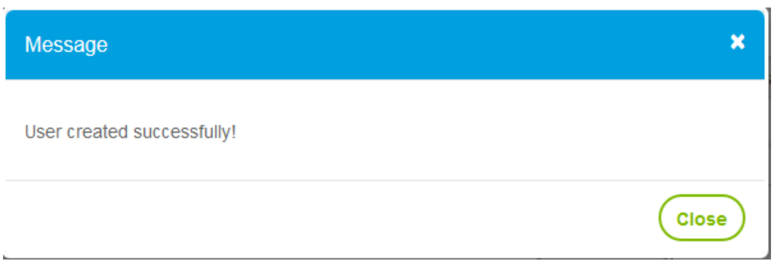
6. Type in the first part of the new user's email address, e.g. **Jo.Bloggs**

Note - You do not need to enter the company name, this will be automatically populated for you.

7. Click User Contact Number *

8. Type in the user's contact number

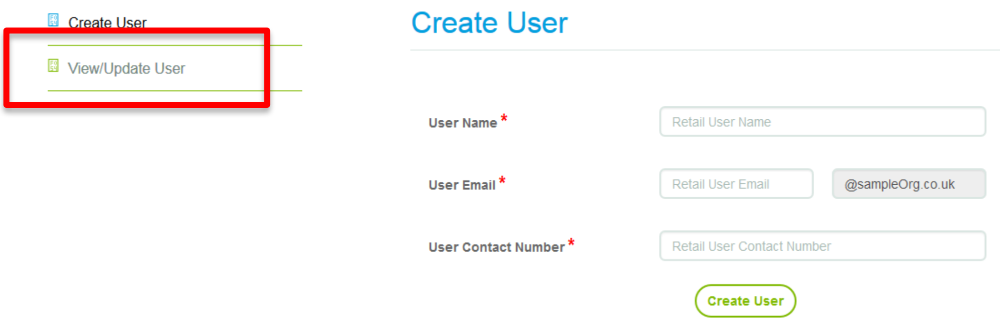
9. Click Create User - the following message will be displayed



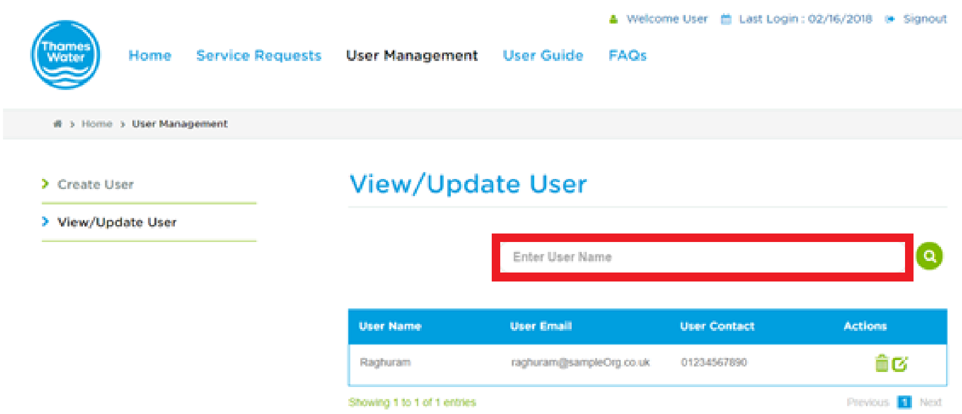
10. Click Close

How to search for an existing user

1. From the User Management screen



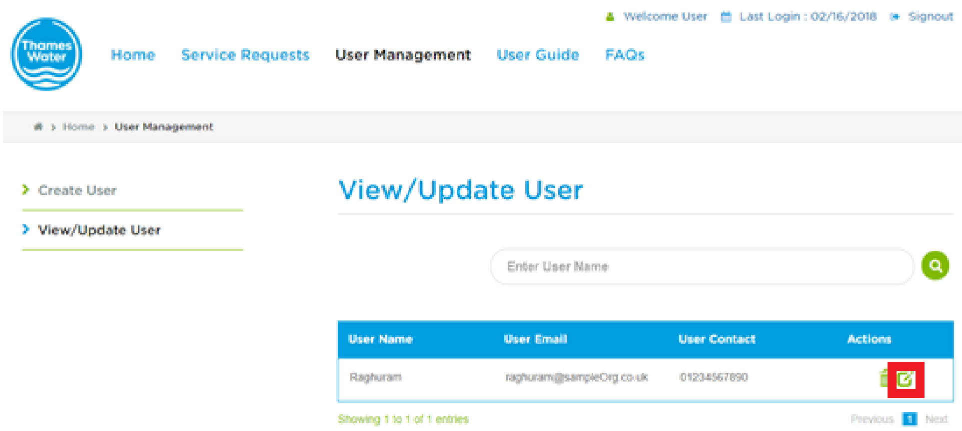
2. Click › View/Update User



3. Click in Search box and type in persons surname – there record will be displayed

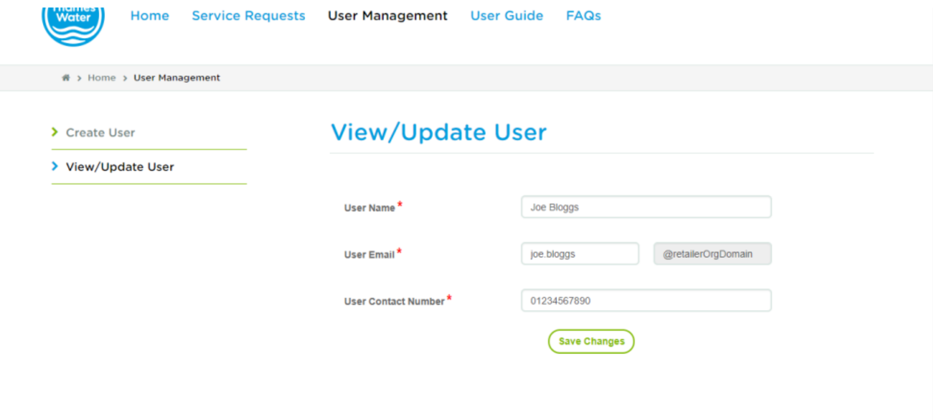
How to update an existing user

1. From the View/Update User screen



2. Click to update

Note although the C01 form and process are referenced in this guide, this service was removed for new requests when the Central Bilateral Hub opened on 22 September 2021

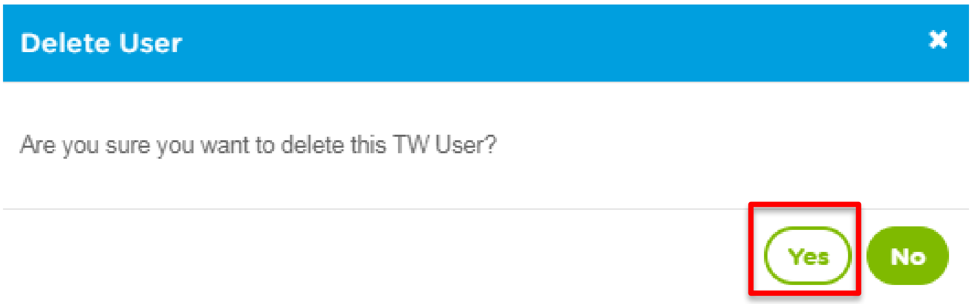


3. You can now make any changes to the user's record. Click Save Changes

Note - If you haven't made any changes to the information, then simply exit the screen.

How to delete a user

1. Use the search function to find the user you want to delete
2. Click - The following message will be displayed



3. Click Yes to delete

Appendix A: H01 – supporting forms for non RTS requests

Introduction

With effect from 9 November 2020, supporting non-Return to Sewer (RTS) forms were added into the retailer portal. These forms have been in use since market opening, although they were not available directly from the portal.

Providing the information requested in these additional forms will enable us to work these requests more efficiently.

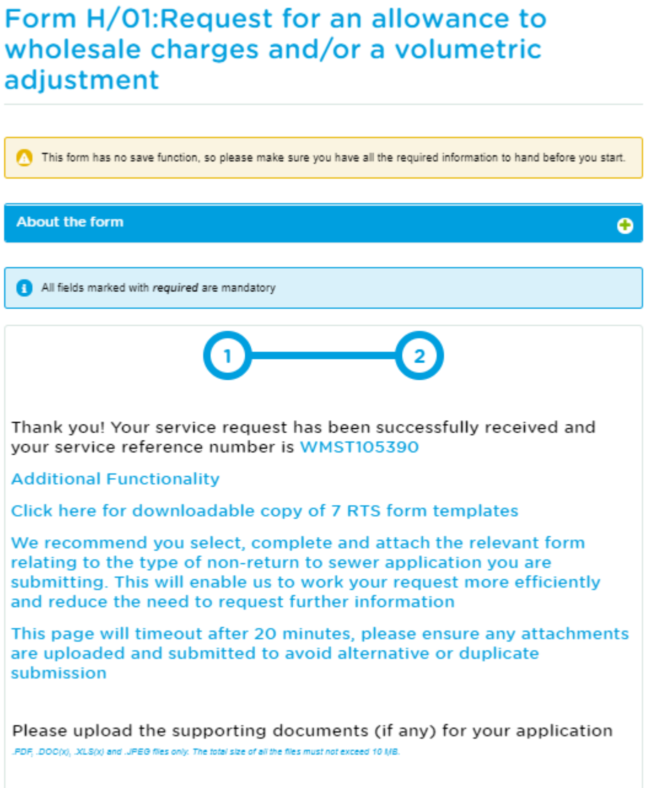
How to access the additional forms

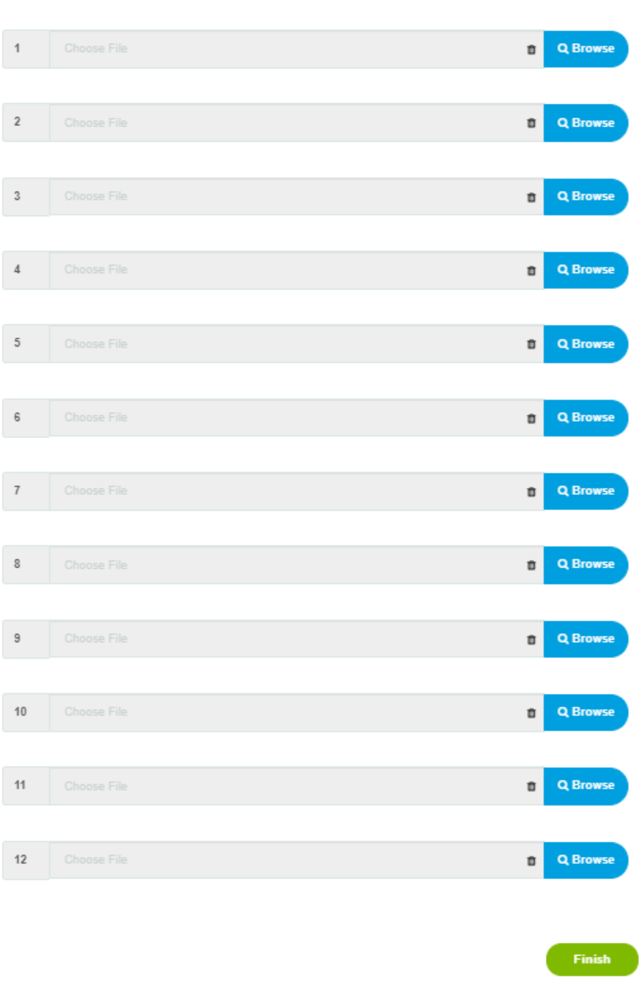
When you complete the H01 form submission and receive confirmation of the WMST reference, there will be a prompt for you to use the appropriate supporting non RTS form, to add the supplementary information required. The prompt is at the point when currently, additional documentation can be uploaded to your request.

These forms will be available for cloned requests as well.

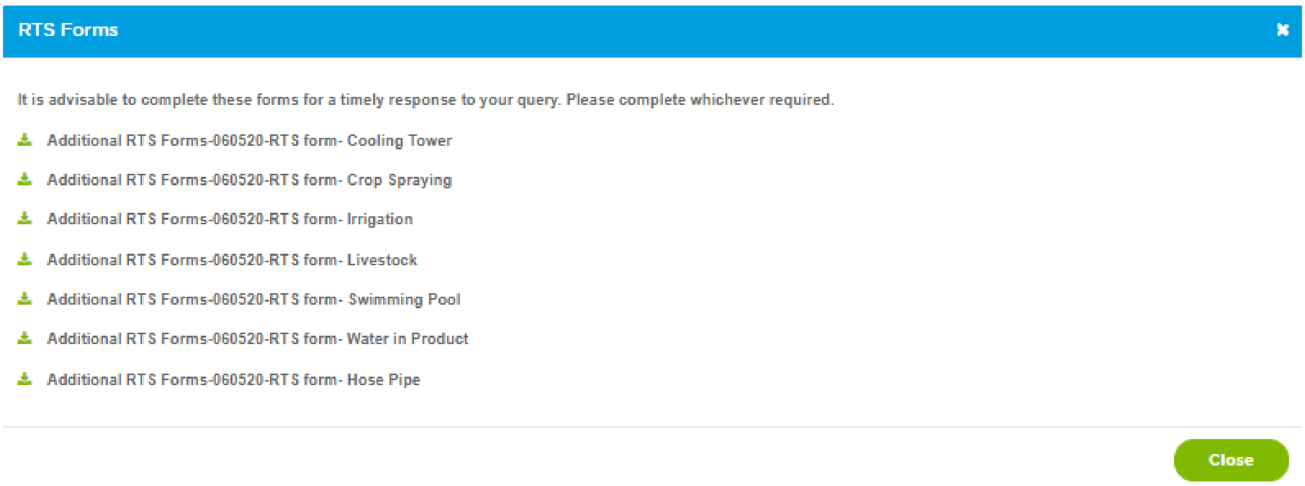
Important note – the section to download and then attach the additional information will time out in 20 minutes. We recommend you are familiar with these forms prior to submitting the form.

What will I see in the Portal?





What will I see if I select the click here for downloadable copies?



See page 13 if you need a reminder of how to upload the file.