



Thames Water Portal User Guide

Thames Water Utilities Limited (TWUL) Wholesale
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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

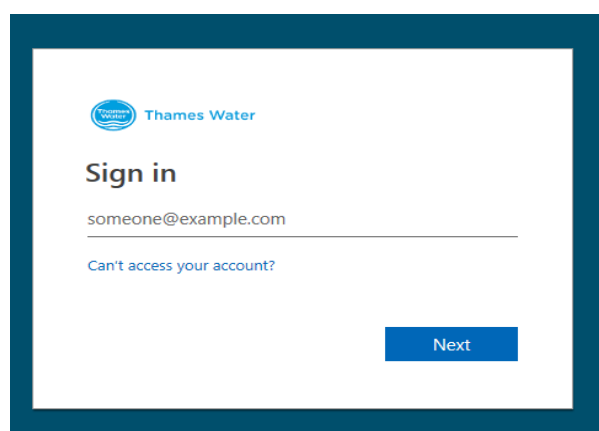
Learning outcome

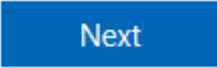
By the end of this exercise, you will be able to log into the Portal to access the landing page.

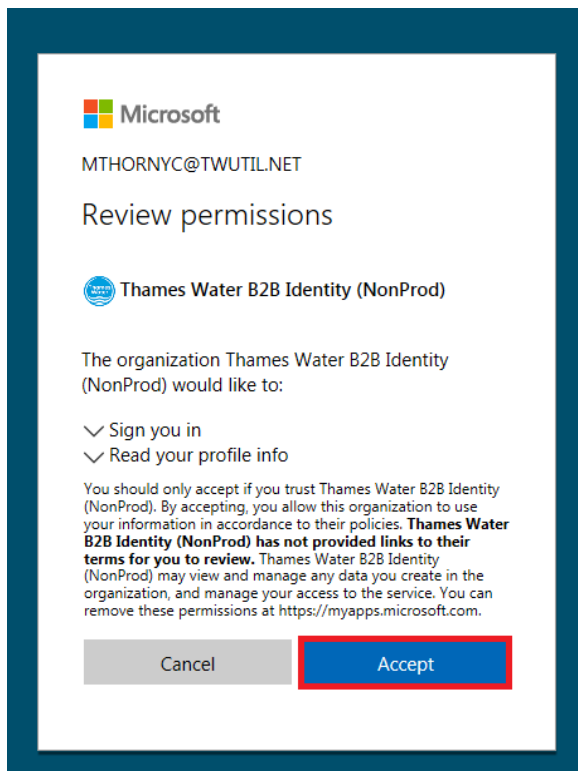
Steps

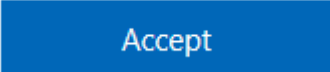
Logging into the Portal

1. Click on either  Google Chrome or  Firefox
2. Type in <https://wmsportal.thameswater.co.uk> in the 'url' field
3. The 'Sign in' screen will be displayed

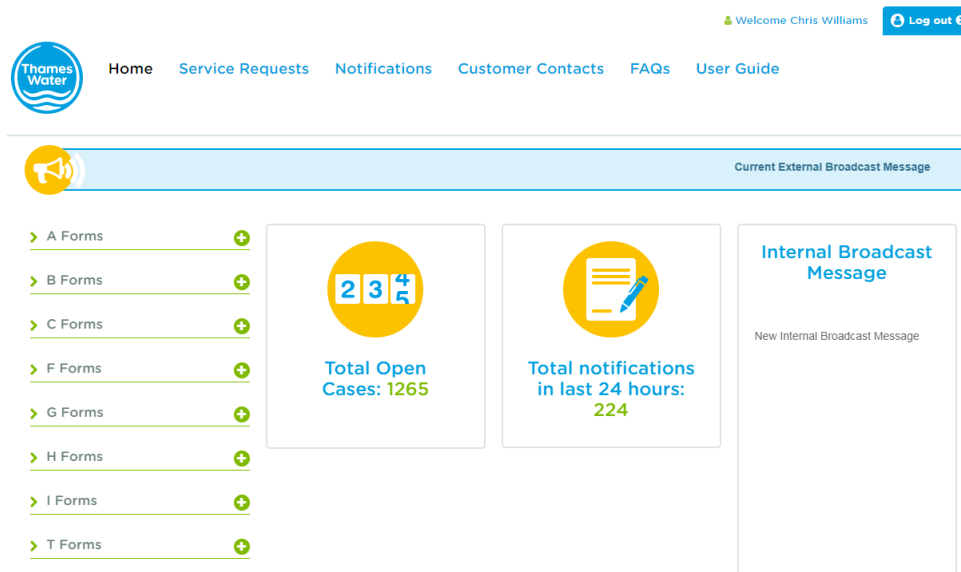


4. Sign in by typing in your email address
5. Click 
6. The 'Review permissions' screen will be displayed



7. Click 

8. The landing page will be displayed

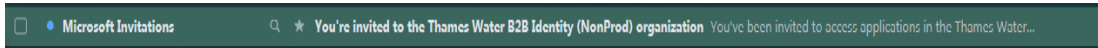


Exercise 2: How to log on the first time without an Office365 account

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.



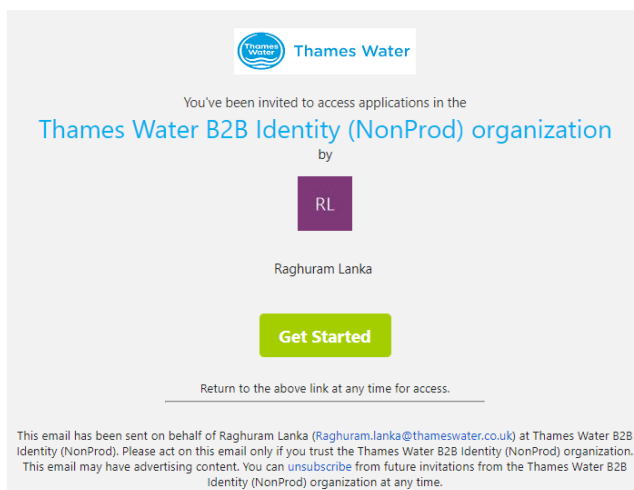
Learning outcome


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

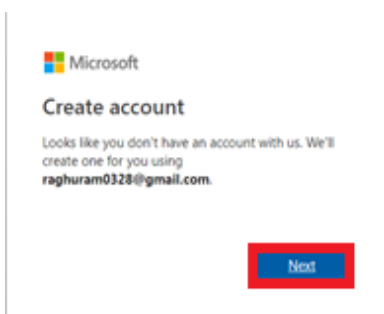
Steps

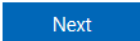
Logging into the Portal


1. Open the invitation you received by email





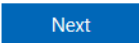


2. Click 
3. The 'Create account' screen will be displayed



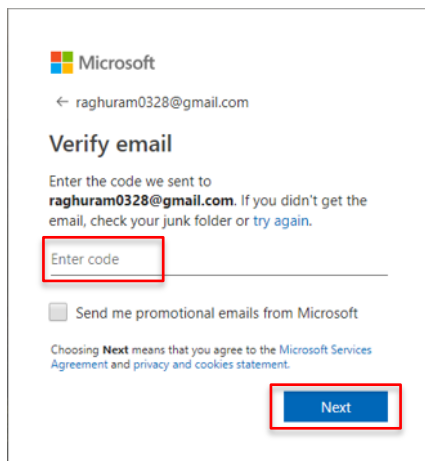
4. Click 
5. The 'Create a password' screen will be displayed

6. Click in 'Create password' and type in your password
7. Click 
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 

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



Microsoft

← raghuram0328@gmail.com

Verify email

Enter the code we sent to **raghuram0328@gmail.com**. If you didn't get the email, check your junk folder or [try again](#).

Enter code

☐ Send me promotional emails from Microsoft

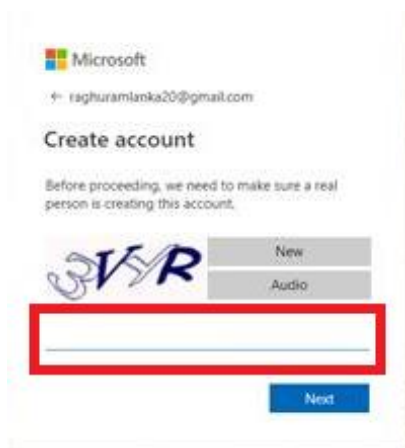
Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Next

18. Click 'Enter code' and type in the code

19. Click 

20. The 'Create Account' captiva screen will be displayed



Microsoft

← raghuramlanka20@gmail.com

Create account

Before proceeding, we need to make sure a real person is creating this account.

3VR

New

Audio

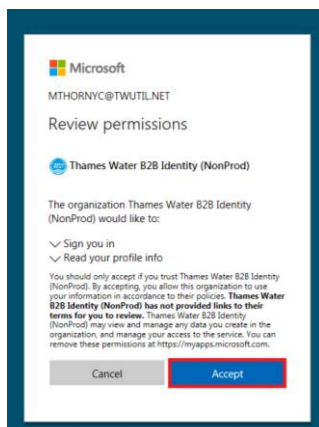
Next

21. Click into the blank space provided

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

23. Click 

24. The 'Review permissions' screen will be displayed



Microsoft

MTHORNYC@TWUTIL.NET

Review permissions

Thames Water B2B Identity (NonProd)

The organization Thames Water B2B Identity (NonProd) would like to:

- ✓ Sign you in
- ✓ Read your profile info

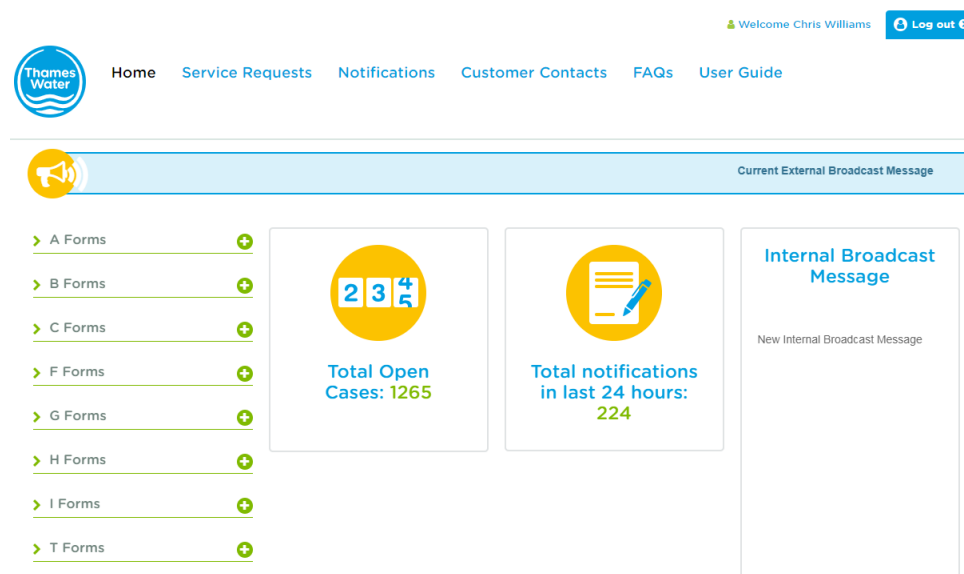
You should only accept if you trust Thames Water B2B Identity (NonProd). By accepting you allow this organization to use your information in accordance to their policies. **Thames Water B2B Identity (NonProd) has not provided links to their terms for you to review.** Thames Water B2B Identity (NonProd) may view and manage any data you create in the organization, and manage your access to the service. You can remove these permissions at <https://myapps.microsoft.com>.

Cancel Accept

25. Click

Accept

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


Thames Water


Welcome Chris Williams [Log out](#)

Home [Service Requests](#) [Notifications](#) [Customer Contacts](#) [FAQs](#) [User Guide](#)

Current External Broadcast Message

[A Forms](#) [+](#)
[B Forms](#) [+](#)
[C Forms](#) [+](#)
[F Forms](#) [+](#)
[G Forms](#) [+](#)
[H Forms](#) [+](#)
[I Forms](#) [+](#)
[T Forms](#) [+](#)


Total Open Cases: 1265


Total notifications in last 24 hours: 224

Internal Broadcast Message

New Internal Broadcast Message

- Click [+](#) to expand the **C Forms** section
- The C forms section will be displayed

C Forms [-](#)

- [Form C/01: Verification of meter details or meter supply arrangements](#)
- [Form C/02: Gap site supply point request and addition of service components](#)
- [Form C/03: Request for deregistration or removal of service components](#)
- [Form C/04: Request to amend third party reference\(s\)](#)

How to open and complete a form

- Click [Form C/01: Verification of meter details or meter supply arrangements](#) to select the form
- The Form C/01 is now displayed and requires the SPID number

Form C/01: Verification of meter details or meter supply arrangements

Warning: This form has no save function, so please make sure you have all the required information to hand before you start.

About the form [+](#)

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

1 — 2

SPID: **required** [Next](#)

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

SPID:

required

- 1. Retailer details
- 2. Eligible premises details
- 3. Meters/meter supply arrangements to be verified
- 4. Information on meters and meter supply arrangements
- Additional Information
- 5. Consent to contact the Non-Household Customer
- 6. Declaration

☐ I have read and agree to the declaration in this form and I accept the terms of Thames Water Wholesale Market Services [Privacy Policy](#)

You can upload attachments for this request after submission of the form

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

☐ I have read and agree to the declaration in this form and I accept the terms of Thames Water Wholesale Market Services [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

Select your meter number: required

Please select ▼

Retrieve meter details

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.

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



Thank you! Your service request has been successfully received and your service reference number is **WMST43133**

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	Choose File	🗑	Browse
2	Choose File	🗑	Browse
3	Choose File	🗑	Browse
4	Choose File	🗑	Browse
5	Choose File	🗑	Browse

Finish

- This document name will appear next to the document number 1 – 5. You can remove a file prior to uploading by selecting the icon

Upload and Finish

- When all the documents have been added, select

Example

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

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:	<input type="text"/>
Contact name: <small>required</small>	Chris Williams
Contact number: <small>required</small>	01234567890
Contact e-mail: <small>required</small>	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

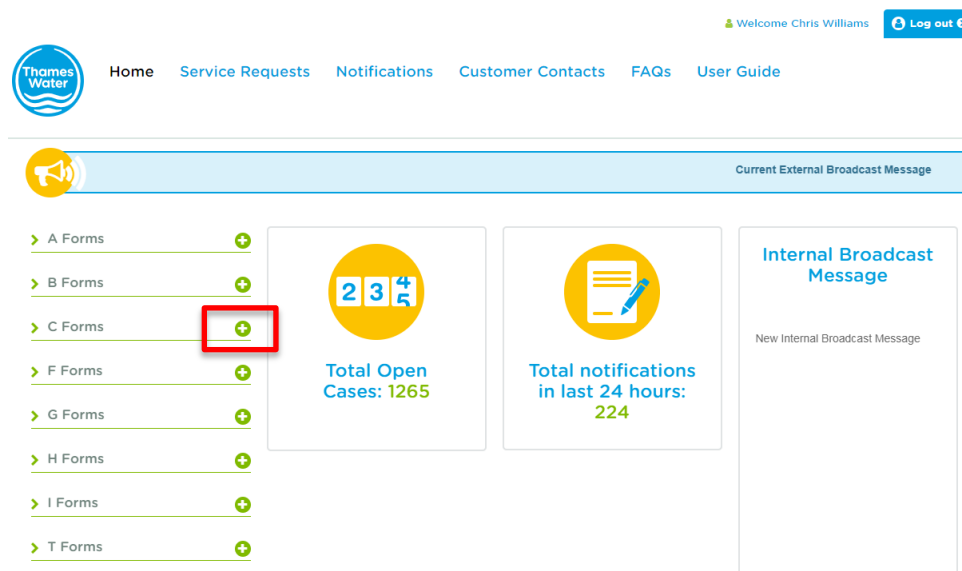
Learning outcome


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

> C Forms



- > Form C/01: Verification of meter details or meter supply arrangements
- > Form C/02: Gap site supply point request and addition of service components
- > Form C/03: Request for deregistration or removal of service components
- > Form C/04: Request to amend third party reference(s)

How to open and complete a form

- > Form C/01: Verification of meter details or meter supply arrangements

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

SPID: required

3010000324S19

Next

Wholesale led work ☒

Next

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

1
—
2

SPID: i
required

3010000324S19

Next

Wholesale led work ☑

1. Retailer details	✓ +
2. Eligible premises details	✓ +
3. Meters/meter supply arrangements to be verified	+
4. Information on meters and meter supply arrangements	+
Additional Information	+
5. Consent to contact the Non-Household Customer	+
6. Declaration	✓ +


☐ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

Submit

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



1. Retailer details  

Retailer name:

Retailer ID:

Retailer's own reference:

Contact name:
required

Contact number:
required


Contact e-mail:
required

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.

5. Consent to contact the Non-Household Customer 

The Wholesaler may wish to contact the Non-Household Customer to arrange a visit to the premises.

Please indicate whether you give consent to the Wholesaler to contact the Non-Household Customer directly to arrange a visit to the premises?
required

☐ Yes ☒ No

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.

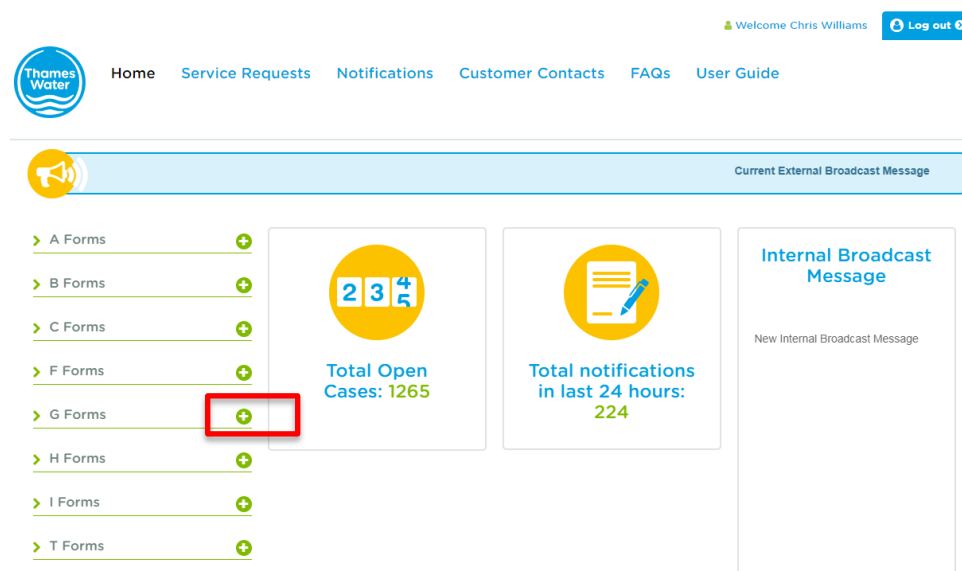
Learning outcome


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


> G Forms


- > Form G/01: Trade effluent enquiries
- > Form G/02: Trade effluent discharge notice
- > Form G/03: Temporary trade effluent discharge application
- > Search G02/G03

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

Please select

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 - 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

The Retailer must complete sections 1, 13 and 14. The Retailer may assist the Non-Household Customer in completing the application, and may make technical enquiries of Wholesaler using Process G1.

1. Retailer details	✓ +
2. Type of application	+
3. Details of applicant to which the application relates	+
4. Variation Information	+
5. Trade Effluent discharge description	+
6. Trade Effluent sampling and monitoring	+
7. Volume Assessment	+
8. Allowances	+
9. Information relating to health and safety	+
12. Declaration by the authorised signatory	+
13. Consent from the Retailer to contact the Non-Household Customer	✓ +
14. Declaration by the Retailer	+

☐ I have read and agree to the declaration in this form

You can upload attachments for this request after completion of the form

Save

Submit to Customer

Submit to TW

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



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

Signature
required



Change

Remove

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



I have read and agree to the declaration in this form

You can upload attachments for this request after completion of the form

Save

Submit to Customer

Submit to TW

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

Customer Email:
required

Submit

Close

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

Message



Form submitted successfully to the NHH Customer and the Reference number is TW21360.



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

Form G/02: Trade effluent discharge notice


About the form 


 All fields marked with **required** are mandatory

Please enter Customer reference:  Next

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

Form G/02: Trade effluent discharge notice

About the form 



 All fields marked with **required** are mandatory


SPID:


☒ I don't have/know my SPID


Type of application: **required** Change of occupier at the consented premises (this includes any change in legal identity of the company)
This is section 2.1


The Non-Household Customer must complete all the collable sections below except 1, 13 and 14


1. Retailer details  


2. Type of application 


3. Details of applicant to which the application relates 


4. Variation Information 


5. Trade Effluent discharge description 



6. Trade Effluent sampling and monitoring 



7. Volume Assessment 

8. Allowances 

9. Information relating to health and safety 

12. Declaration by the authorised signatory 

13. Consent from the Retailer to contact the Non-Household Customer  

14. Declaration by the Retailer  

☐ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

Save Submit to Retailer

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).

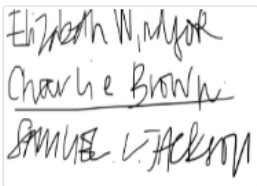
I acknowledge that there may be a requirement to provide and maintain suitable inspection chambers/effluent treatment/monitoring equipment and for reporting information on the composition and volume of Trade Effluent discharged to sewer.

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

- 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

☒ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

Save

Submit to Retailer

- 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

Email address:

required *Please enter a valid email address*

- Amend then submit

Message ×


Form data submitted to retailer successfully.

Ok

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.

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

1 LBT.jpg Browse

2 Choose File Browse

3 Choose File Browse

4 Choose File Browse

5 Choose File Browse

Upload and Finish

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

Success

Files have been uploaded successfully

Ok

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

Form G/02: Trade effluent discharge notice

About the form



All fields marked with **required** are mandatory

Details submitted successfully. Please [click here](#) to print form

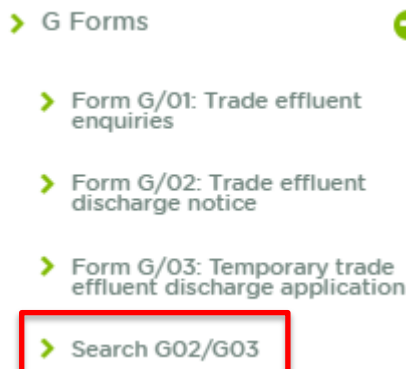
1. Click [click here](#) to open a copy of the form to print

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 customer 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'

Home > Search G02/G03

Forms:

Select form


Status: Pending With


SPID:

Unique Reference:



Unique Reference	SPID	Form Name	Customer Name	Shared with Customer on	Customer Submitted on	Submitted by	Status	Delete
TW21227	-	G02	x	15/01/2019	22/01/2019	x	Pending with Retailer	
TW21226	-	G02	x	14/01/2019	23/01/2019	x	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

Delete Record 

Are you sure that you want to delete this record?

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.

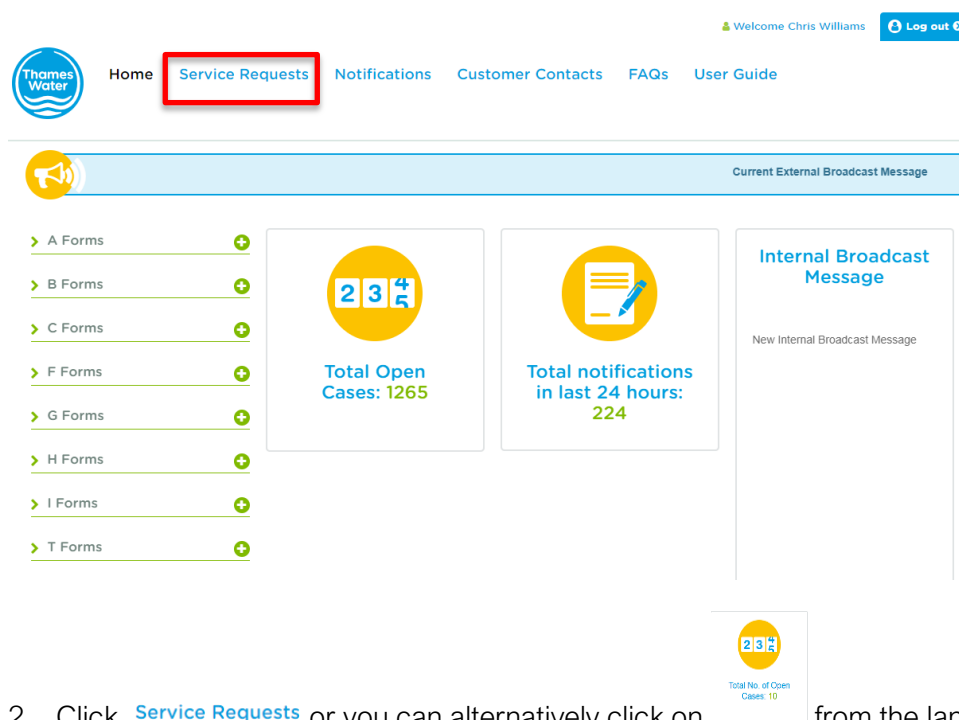
Learning outcome


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

Service Requests


Search / Filter By:

SPID xxxxxxxxxxSxxx	Service Request Number Eg: WMST12345	Form Name Eg: C01	Submitted By Eg: Joe Bloggs
Status Please select ▼	From dd/mm/yyyy	To dd/mm/yyyy	  Export to Excel

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 

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

Service Requests


Search / Filter By:

SPID <input type="text" value="xxxxxxxxxxxx"/>	Service Request Number <input type="text" value="Eg: WMST12345"/>	Form Name <input type="text" value="C01"/>	Submitted By <input type="text" value="Chris"/>
Status <input type="button" value="Please select"/>	From <input type="text" value="dd/mm/yyyy"/>	To <input type="text" value="dd/mm/yyyy"/>	<input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="Export to Excel"/>

Displaying first 2000 records

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
3010097889W13	WMST101512	C01	Alpha	16-01-2020	Chris	Desk Analysis	Pending	New	17-01-2020			
3010097889W13	WMST101511	C01	Bravo	16-01-2020	Chris	Desk Analysis	Pending	New	17-01-2020			
3010097889W13	WMST100970	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST101512
3010097889W13	WMST100969	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100972
3010097889W13	WMST100967	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100969
3010097889W13	WMST100966	C01	Thames Water Utilities Limited	19-12-2019	Chris	Desk Analysis	Cancelled by Retailer	Cancelled by Retailer	20-12-2019			WMST100970

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  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.

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 1m ³	Location	Meter physical size ⁶	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

Form C/01: Verification of meter details or meter supply arrangements

This form has no save function, so please make sure you have all the required information to hand before you start.

About the form

All fields marked with required are mandatory

1 2

SPID:

Wholesale led work ☐

- 1. Retailer details
- 2. Eligible premises details
- 3. Meters/meter supply arrangements to be verified
- 4. Information on meters and meter supply arrangements
- Additional Information
- 5. Consent to contact the Non-Household Customer
- 6. Declaration

☐ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

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

Form C/01: Verification of meter details or meter supply arrangements

This form has no save function, so please make sure you have all the required information to hand before you start.

About the form

1 All fields marked with required are mandatory

1 — 2

Thank you! Your service request has been successfully received and your service reference number is **WMST101512**

Please upload the supporting documents (if any) for your application
(PDF, DOCX, XLSX and JPEG files only. The total size of all files must not exceed 10 MB)

1 Choose File

2 Choose File

3 Choose File

4 Choose File

5 Choose File

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

1 Useful Links C01 Training.docx

2 Choose File

3 Choose File

4 Choose File

5 Choose File

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

Success

Files have been uploaded successfully

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			

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
- e) Termination of consent (i.e. discharge has permanently ceased or occupier has moved off the premises)

Form G/03: Temporary trade effluent discharge application

About the form

All fields marked with **required** are mandatory

1

2

SPID:

I don't have/know my SPID ☒

Type of application:

required

Temporary discharge less than or equal to 6 mo

This is section 2

Thames Water do not issue multi-site activity consents

Next

Note that Temporary Consent services differ between Wholesalers, you may wish to check with your Retailer before completing this application

The Retailer should complete sections 1, 12 and 13. The Non-household customer appointed Retailer may assist the Non-household Customer in completing the application, and may make technical enquiries of Wholesaler using Process G1

1. Retailer details

3. Details of applicant to which the application relates

4. Trade premises details to which application for consent applies

5. Contact Details

6. Proposed duration of temporary discharge

7. Trade Effluent discharge description

8. Trade Effluent sampling and monitoring

9. Volume Assessment

10. Information relating to health and safety

11. Declaration by the authorised signatory

12. Consent from the Retailer to contact the Non-Household Customer

13. Declaration by the Retailer

☐ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

Save

Submit to Customer

Submit to TW

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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

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

13. Declaration by the Retailer

I believe the information given above is true and accurate.
I confirm that, subject to completion of the remaining steps of Process G2, 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

My Name

[Change](#) [Remove](#)

Date (dd-mm-yyyy):
required 17-01-2020

Full name (in capitals):
required Chris

Role in the company or job title:
required wmsadmin

Telephone number:
required 0212111111

E-mail address:
required chris.williams@thameswater.co.uk

☒ I have read and agree to the declaration in this form

You can upload attachments for this request after submission of the form

[Save](#) [Submit to Customer](#) [Submit to TW](#)

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: Status: 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	

- 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

- The landing page will be displayed

- 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

3. The notifications view will be displayed for your company

Notifications

Search / Filter By:

SPID: Customer Name: Notification type: Postcode: From: To:

Export to Excel

SPID	Customer Name	Postcode	Retailer ID	Notification Type	Notification Received Date	Attachment	View
3010166095W18		RG10 8LT		Long Term/Short Term Planned Work	10-01-2019		
3011128650w16		NW9 7ED		Long Term/Short Term Planned Work	10-01-2019		
3011128650w16		NW9 7ED		Long Term/Short Term Planned Work	10-01-2019		
3011128650w16		NW9 7ED		Events	10-01-2019		
3011128650s13		NW9 7ED		Flips& SSP	10-01-2019		

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

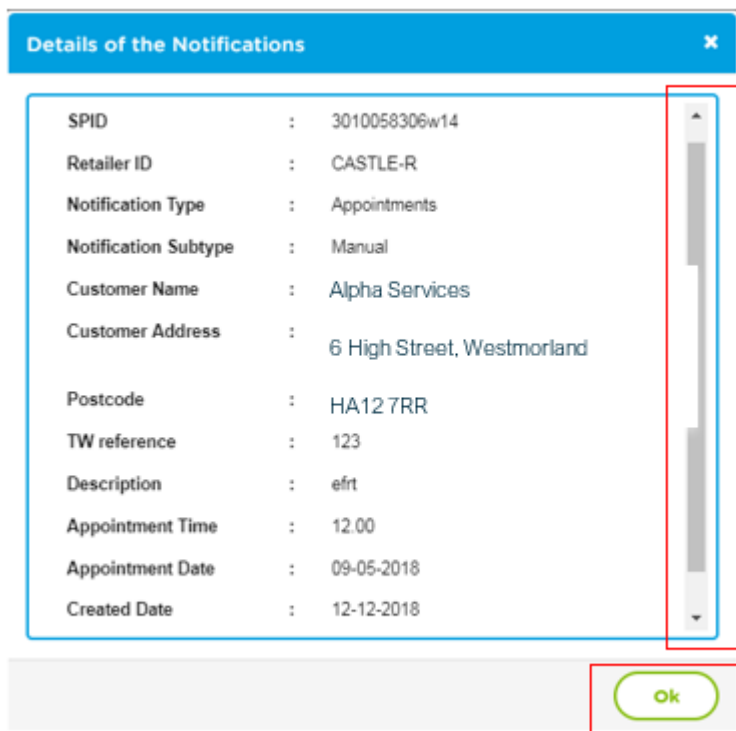
There is also the functionality to export the data to excel using the button below the search / clear search icons



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



SPID	:	3010058306w14
Retailer ID	:	CASTLE-R
Notification Type	:	Appointments
Notification Subtype	:	Manual
Customer Name	:	Alpha Services
Customer Address	:	6 High Street, Westmorland
Postcode	:	HA12 7RR
TW reference	:	123
Description	:	efrt
Appointment Time	:	12.00
Appointment Date	:	09-05-2018
Created Date	:	12-12-2018

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

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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.

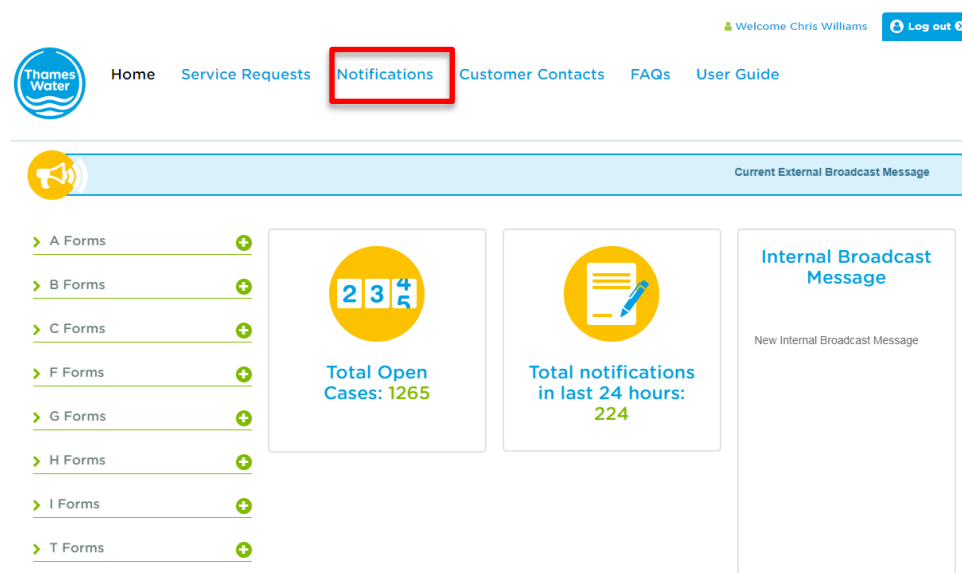
Learning outcome

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

Notifications

Add Notification

Search / Filter By:

SPID:
 Customer Name:
 Notification type:
 Postcode:
 From:
 To:

SPID	Customer Name	Postcode	Retailer ID	Notification Type	Notification Received Date	Attachment	View
3010166095W18	HENNEF GOLF C	8LT	CASTL	Long Term/Short Term Planned Work	10-01-2019		
3011128650w16	MODU LTC	7ED	CASTL	Long Term/Short Term Planned Work	10-01-2019		
3011128650w16	MODU LTC	7ED	CASTL	Long Term/Short Term Planned Work	10-01-2019		
3011128650w16	MODU LTC	7ED	CASTL	Events	10-01-2019		
3011128650s13	MODU LTC	7ED	CASTL	Flips& SSP	10-01-2019		

- Click
- Select the 'Notification type' from the following options

Add Notification

Notification type:

- Please select
- Appointments
- Customer complaints
- Events
- Flips& SSP
- LCE / CUFIS
- Long Term/Short Term Planned Work
- Miscellaneous
- Section notices
- Trade Effluent

- 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 , this will pre-populate some of the required fields
- Remember, if you do not have the SPID or it is unknown, you cannot use this application to send a notification
- 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

Attachments

1


Choose File




 Browse

2

Choose File



 Browse

Remove Attachment

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

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

Customer Contacts



Reason Retailer ID Status  




Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
	Bulk	BLK1021	RG1 Event	Sathia G	14-01-2019		Open	14-01-2019	Chris	2/6
-	Individual	IND1031	Leak Fix	Sathia G	14-01-2019		Open	-	-	0/1

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

Customer Contacts

Reason Retailer ID Status  

Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
	Bulk	BLK1021	RG1 Event	Sathia G	14-01-2019		Open	14-01-2019	Chris	2/6
-	Individual	IND1031	Leak Fix	Sathia G	14-01-2019		Open	-	-	0/1

Individual request received by Retailer

Request Update

×

SPID:

Customer Contact Number: *required*

Effective to Date: *required*

Reason for Request: *required*

☐ I hereby acknowledge and declare that I have read and agree to the Terms and Conditions published on the TWUL Wholesale Website and that I have read and agree to the Additional Terms and Conditions in this form

Individual request updated by Retailer

Request Update ✕

SPID:

3010777272S16

Customer Contact Number:

07777777777

required

Effective to Date:

12-03-2019

required

Reason for Request:

Leak Fix

required

☒

I hereby acknowledge and declare that I have read and agree to the Terms and Conditions published on the TWUL Wholesale Website and that I have read and agree to the Additional Terms and Conditions in this form

Submit

Customer Contact Details ✕

SPID:

:

3010777272S16

Customer Contact Number

:

07777777777

Effective to Date

:

12-03-2019

Reason For Request

:

Leak Fix

Ok

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'

Customer Contact Details

SPID:

:

3010777272S16

Customer Contact Number

:

07777777777

Effective to Date

:

12-03-2019

Reason For Request

:

Leak Fix

Ok

Exercise 1 1: 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

Thames Water

Welcome Chris Log out

Home Service Requests NAV Application Notifications Customer Contacts FAQs User Guide

Home > Customer Contacts

Customer Contacts

Add Customer Contact

Reason: Retailer ID: Status: Please select

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

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

Customer Contacts

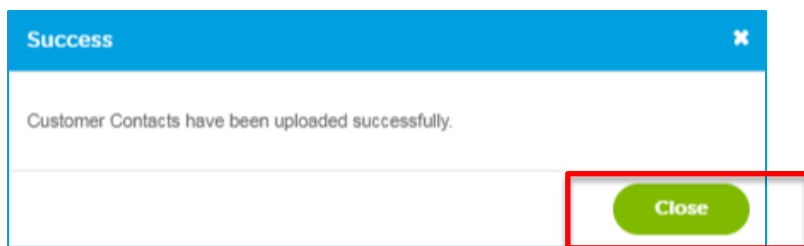
☐ Individual Request ☒ Bulk Upload Request

Reason: required

1 Choose File

Please upload the documents (if any) for your notification
.XLS(X) and .CSV files only. The total number of records must not exceed 50,000

- 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.
- 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

Home > Customer Contacts

Customer Contacts

Reason: Retailer ID: Status: Q X

Action	Request Type	Request Number	Reason	Submitted by	Submitted on	Update	Status	Responded On	Responded By	No of SPIDs Updated
	Bulk	BLK1021	RG1 Event	Sethia G	14-01-2019		Open	14-01-2019	Chris	2/6
-	Individual	IND1031	Leak Fix	Sethia G	14-01-2019		Open	-	-	0/1

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

☒ Individual Request
 ☐ Bulk Upload Request

SPID: required Next

Retailer ID:

Customer Name:

Customer Address:

Post Code:

Reason for Request: required

Customer Contact number:

Effective to date:

Remarks:

Submit

- 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'

Success
✕

Customer Contact saved successfully.

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	Sethia G	14-01-2019	👁	Closed	14-01-2019	Chris	1/1

The 👁 view

Customer Contact Details
✕

SPID: : 3010777272S16

Customer Contact Number : 07777777777

Effective to Date : 12-03-2019

Reason For Request : Leak Fix

Ok

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.

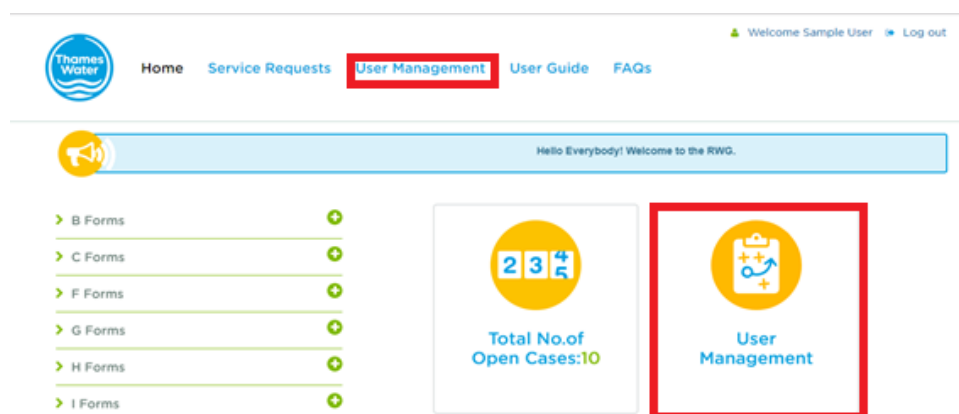
Learning outcome

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

Create User

User Name *

User Email *

User Contact Number *

Create User

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

Message ✕

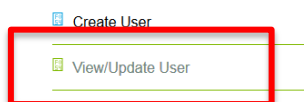
User created successfully!

Close

10. Click **Close**

How to search for an existing user

1. From the User Management screen



Create User

User Name *

User Email *

User Contact Number *

[Create User](#)

2. Click [View/Update User](#)

Thames Water

Home Service Requests User Management User Guide FAQs

Welcome User Last Login : 02/16/2018 Signout

Home > User Management

Create User

View/Update User

View/Update User

Enter User Name

User Name	User Email	User Contact	Actions
Raghuram	raghuram@sampleOrg.co.uk	01234567890	Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

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

Thames Water

Home Service Requests User Management User Guide FAQs

Welcome User Last Login : 02/16/2018 Signout

Home > User Management

Create User

View/Update User

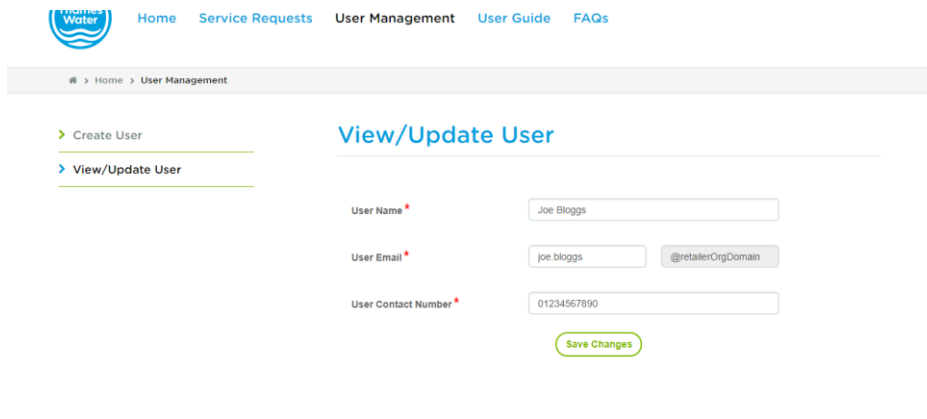
View/Update User

Enter User Name

User Name	User Email	User Contact	Actions
Raghuram	raghuram@sampleOrg.co.uk	01234567890	Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

2. Click [Edit](#) to update



Thames Water

Home Service Requests User Management User Guide FAQs

Home > User Management

Create User

View/Update User


View/Update User

User Name * Joe Bloggs

User Email * joe.bloggs @retailerOrgDomain


User Contact Number * 01234567890

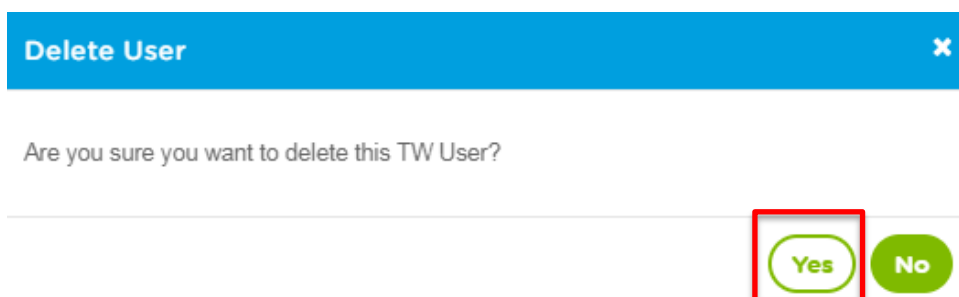
Save Changes

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

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



Delete User

Are you sure you want to delete this TW User?

Yes No

3. Click  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?

Form H/01: Request for an allowance to wholesale charges and/or a volumetric adjustment

 This form has no save function, so please make sure you have all the required information to hand before you start.

About the form

 All fields marked with **required** are mandatory

1

2

Thank you! Your service request has been successfully received and your service reference number is **WMST105390**

Additional Functionality

























[Click here for downloadable copy of 7 RTS form templates](#)


We recommend you select, complete and attach the relevant form relating to the type of non-return to sewer application you are submitting. This will enable us to work your request more efficiently and reduce the need to request further information

This page will timeout after 20 minutes, please ensure any attachments are uploaded and submitted to avoid alternative or duplicate submission


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	Choose File	  Browse
2	Choose File	  Browse
3	Choose File	  Browse
4	Choose File	  Browse
5	Choose File	  Browse
6	Choose File	  Browse
7	Choose File	  Browse
8	Choose File	  Browse
9	Choose File	  Browse
10	Choose File	  Browse
11	Choose File	  Browse
12	Choose File	  Browse




What will I see if I select the [click here](#) for downloadable copies?

RTS Forms


It is advisable to complete these forms for a timely response to your query. Please complete whichever required.

-  [Additional RTS Forms-060520-RTS form- Cooling Tower](#)
-  [Additional RTS Forms-060520-RTS form- Crop Spraying](#)
-  [Additional RTS Forms-060520-RTS form- Irrigation](#)
-  [Additional RTS Forms-060520-RTS form- Livestock](#)
-  [Additional RTS Forms-060520-RTS form- Swimming Pool](#)
-  [Additional RTS Forms-060520-RTS form- Water in Product](#)
-  [Additional RTS Forms-060520-RTS form- Hose Pipe](#)



See [page 13](#) if you need a reminder of how to upload the file.