



Portal User Guide

Version History

Version	Description	Date
0.1	Initial draft	13-May-24
0.2	Updates	16-May-24
0.3	Updates	May-24
0.4	Added API Switching Key	14-Aug-24
0.5	Updates for multi brand accounts	23-Aug-24
0.6	Updated screenshots	04-Sep-24
0.7	Internal review	10-Sep-24
0.8	Changes to Reports view	18-Sep-24
0.9	Added Pending and Overdue Switches Reports	03-Dec-24
0.10	Added multi-factor authentication	06-Jan-25
	Added manual address entry for gaining switches	15-Jan-25
	Added Circuits Matching Provider details	24-Jan-25

Glossary

Term	Description
RCP	A retail communications provider that sells IAS or NBICS to residential customers.
SureSwitch RCP	An RCP that makes use of SureSwitch as their managed access solution.
Subscriber	An end-user consumer of broadband or telephony services.

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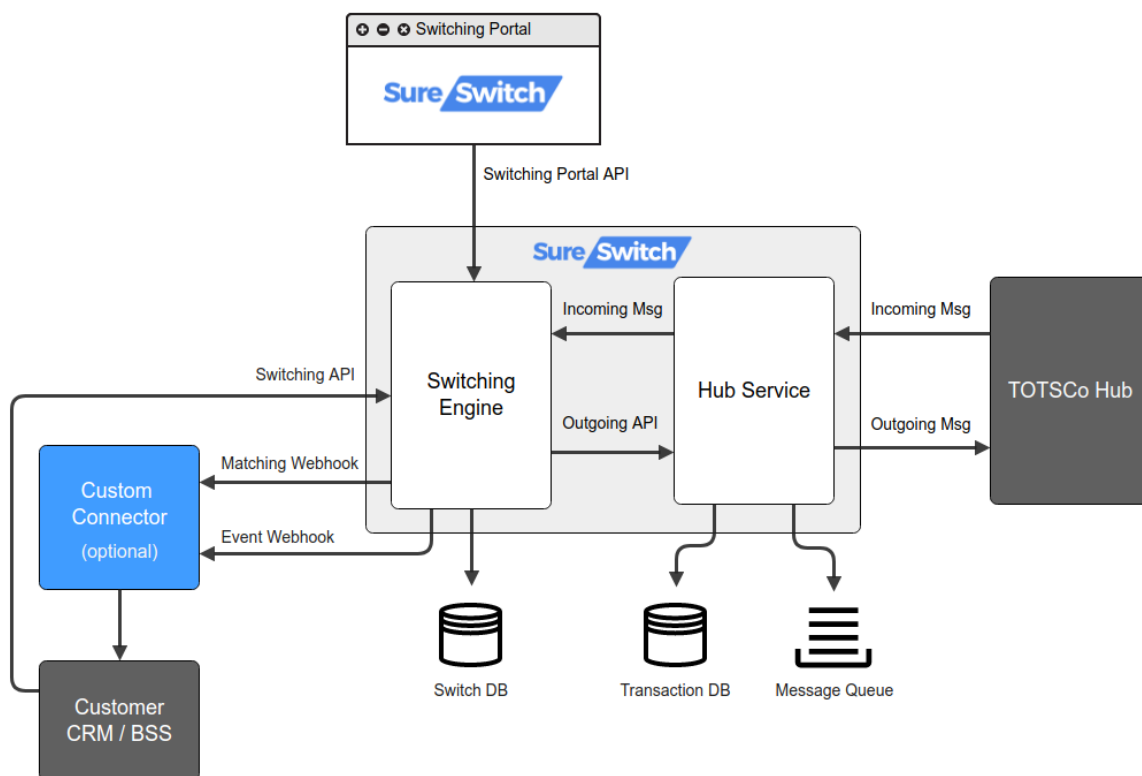
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Introduction

Involved with One Touch Switch (OTS) from the start, Zentive are an official Managed Access Provider (MAP) for The One Touch Switching Company (TOTSCo). Using our extensive knowledge of the OTS process we developed our SureSwitch solution with maximum flexibility for use by any Communication Provider or Reseller regardless of size or existing infrastructure.

Our SureSwitch Portal can be used to manage gaining switch orders, from matching to activation, communicating seamlessly with the TOTSCo Hub on your behalf. SureSwitch users can submit and manage Gaining Switches and can track the status of gaining and losing switch cases at any stage of the Switching process.

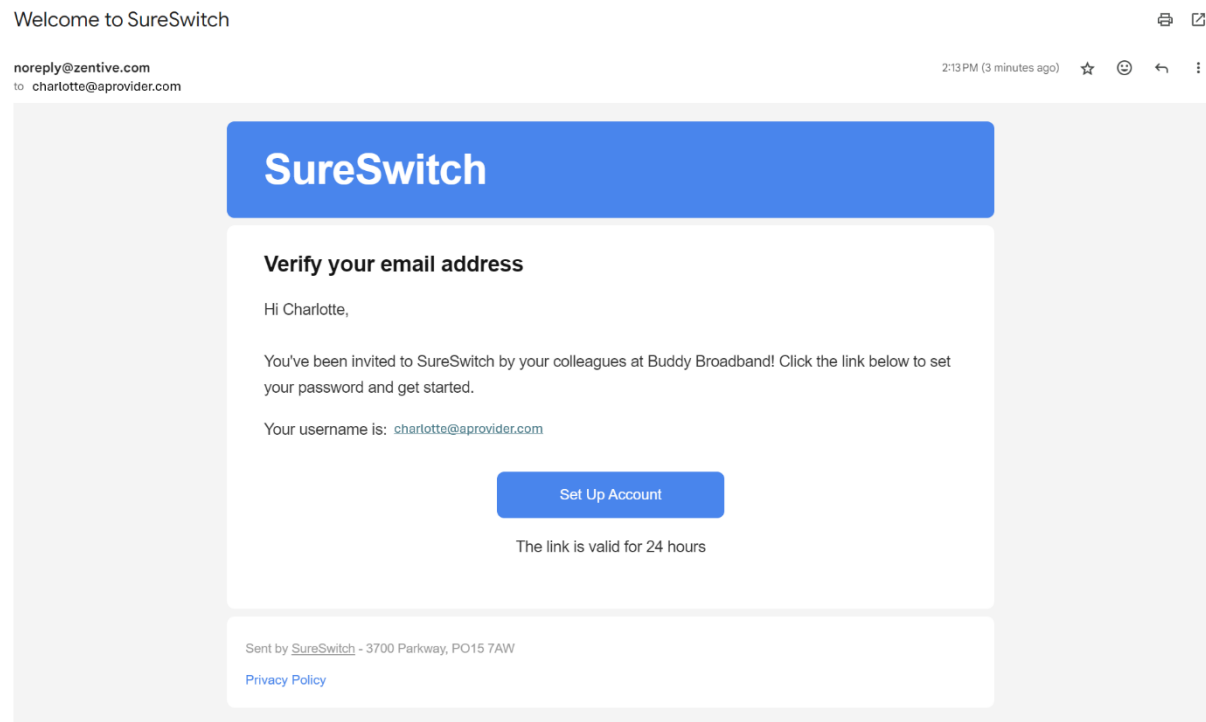
System Overview



Account Registration

All Communication Providers signing up to use SureSwitch will have their account created by Zentive with a main administrator user account. The account creation will trigger a Welcome email to your admin user so that registration can be completed, and the Portal accessed.

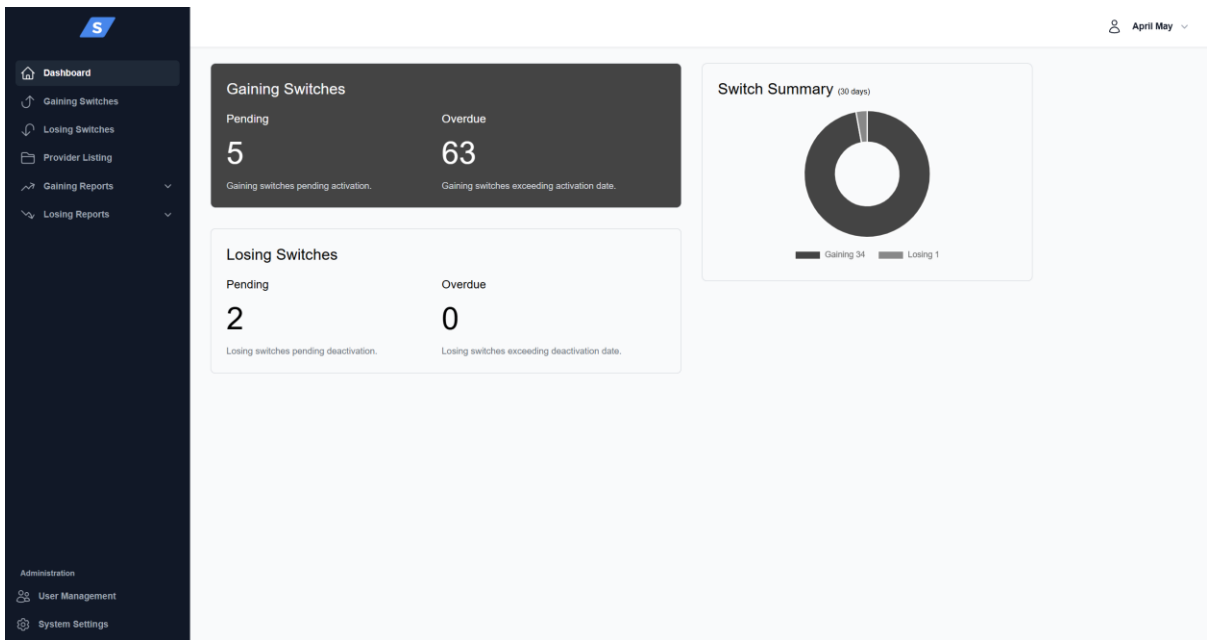
Example Welcome Email



On receipt of the Welcome email, clicking Set Up Account will navigate to the Register User screen, where you can create, confirm, and set your password. From here your user account is complete and you will be navigated to the SureSwitch Portal Dashboard.

User Dashboard

The Dashboard gives an overview of the switches in progress with the provider for both gaining and losing switches, and a count of pending and overdue cases that need attention. Clicking on Pending and Overdue switch figures navigates to the report which can be generated to see the pending and overdue switches.



Gaining Switches

The SureSwitch Portal allows you to manage your gaining switch cases throughout the entire process to completion.

Selecting the Gaining Switches menu option displays a list of gaining switch cases currently in your system, showing a summary of information including status, planned switch date, and losing provider. If the account has multiple registered brands, the Gaining Switches view will include a filter for Gaining Provider and will also include the Gaining Provider in the table.

Gaining switches that have not been updated within the last 60 days will be marked as abandoned. These switches can be displayed by checking the Show abandoned checkbox.

The screenshot shows a web application interface for 'Gaining Switches'. On the left is a dark sidebar with navigation options: Dashboard, Gaining Switches (selected), Losing Switches, Provider Listing, Gaining Reports, and Losing Reports. Below this is an 'Administration' section with User Management and System Settings. The main content area is titled 'Gaining Switches' and includes a 'Create New' button. Below the title are filters for 'Generated/Switch order reference', 'Switch status', 'Losing provider / RCPID', and a 'Show abandoned' checkbox. The main part of the interface is a table with the following data:

Created Date	Generated Reference	Status	Ordered Switch Order Reference	Planned Switch Date	Losing Provider
13th Dec 2024 at 12:14	BBPG-0472	Match success			ZENTIVE CABLE LIMITED
5th Dec 2024 at 05:37	BBPG-0470	Order failed	210d330a-2b60-492b-937e-5dd047a03a20	12th Dec 2024	Grapevine CP Junior
5th Dec 2024 at 05:37	BBPG-0469	Order failed	9cbb4470-5d02-4a9d-b39d-68f563812bc	12th Dec 2024	Zentive-Test
26th Nov 2024 at 17:18	BBPG-0468	Order failed	8668457b-4aa5-4c8b-81bc-7b9fd66d3d1	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 17:11	BBPG-0465	Cancel failed	1be282b7-750d-487b-91c7-af0fa25e18cb	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 17:08	BBPG-0463	Match failed			Zentive-Test
26th Nov 2024 at 17:02	BBPG-0461	Order failed	293d2b5-c33f-48ed-95b0-a0330d5a0564	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 17:00	BBPG-0460	Match failed			Zentive-Test
26th Nov 2024 at 16:59	BBPG-0459	Match failed			Zentive-Test
26th Nov 2024 at 16:50	BBPG-0458	Cancel failed	69c8bffe-39c2-4448-9e5d-d2ab39387b23	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:42	BBPG-0457	Cancel failed	72520269-e3ac-49f7-9530-ee0095a844c0	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:36	BBPG-0456	Cancel failed	d93261c6-3db7-4e55-8a7a-dfa2711f385	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:20	BBPG-0455	Trigger failed	b1186575-2010-4fe9-b07d-c08cfa8586c8	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:17	BBPG-0454	Trigger failed	3869a0e7-3714-4c87-ba42-8035c0ff6407	3rd Dec 2024	Zentive-Test

Stages of the Gaining Switch process:

Switch Stage	Description
Matching	Customer and their existing service details are collected and sent to the losing provider to match with their subscriber data.
Matched	Losing provider makes a match and returns switching options for the customer to select
Ordered	Customer selects the required switch action and places the order to proceed with switching their services
Updated	Successful orders can be updated with new planned switch dates if required
Triggered	Successful orders are triggered when the gaining provider activates the service. This is a notice to the losing provider to cease services and billing
Cancelled	Successful orders can be cancelled at any stage prior to being triggered

Create a Gaining Switch Case

On the Gaining Switches screen select Create New to display the New Gaining Switch screen. The details on this screen are used for matching the customer with data held by the losing provider. The mandatory fields are indicated with an asterisk, all other details are optional.

The Our reference value is any id that may refer to the customer in your BSS, allowing you to create a link between a customer and a switch case.

The customer address can be found by searching on postcode or the Unique Property Reference Number (UPRN). Where necessary, a selected address can be edited by selecting the Edit address link and making the necessary changes. It is also possible to add the customer address manually by selecting the Enter address manually link and populating the mandatory address fields.

As most customers will not be aware of their address Unique Property Reference Number (UPRN), their address can also be found by searching on postcode. If the address provided by the customer is not found, or any provided UPRN does not match, then the switch cannot continue via the SureSwitch Portal.

The customer's existing provider should be selected from the Losing Provider dropdown, this is a list of all Providers registered with the TOTSCo Hub. If the customer's provider is not listed, the switch cannot continue via the SureSwitch Portal, and the customer must contact their losing provider directly.

At least one service must be added to attempt a match. To add a service click Add +, enter the broadband or telephony details and select the action that is required. For broadband, you can only cease service from the losing provider, for telephony, porting should be used if the customer wishes to keep their telephone number. Identify can also be used to assist with match requests where the phone service exists but will not be included in the switch. Once the details are complete, click Add Service and repeat the process for all known services that are required to be actioned by the switch.

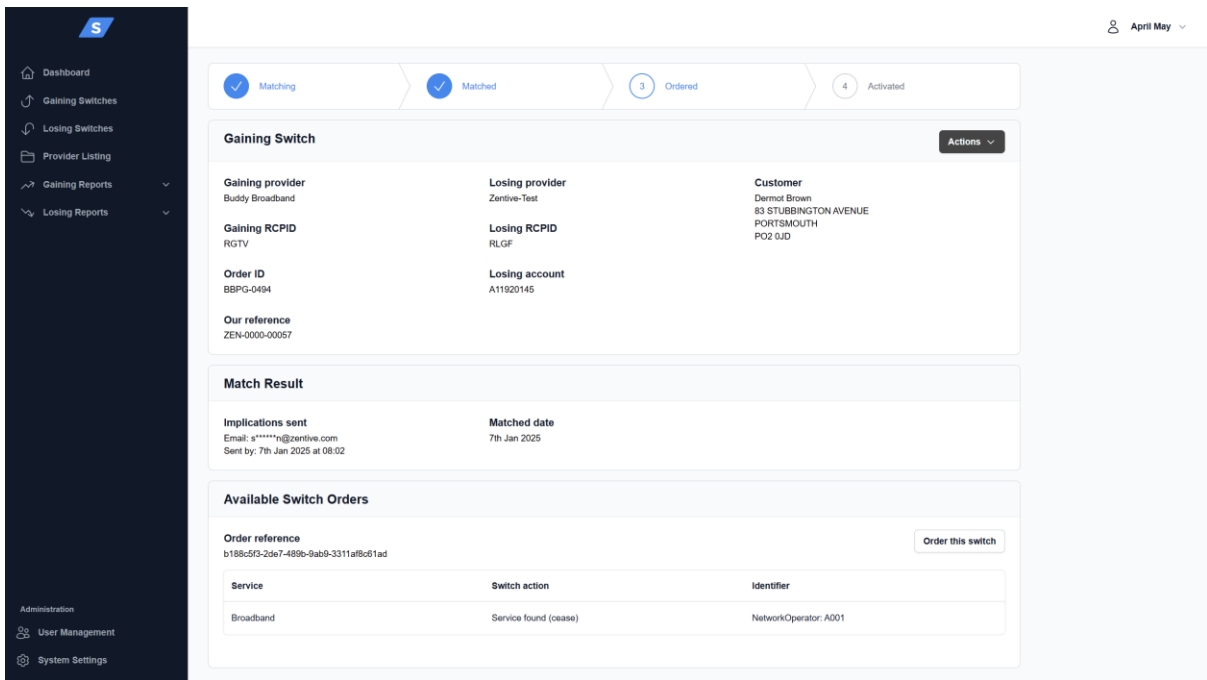
When using the SureSwitch Portal for switching, the customer must consent to their existing provider contacting them with the implications of their required switch. If the customer does not consent, the switch cannot proceed via the SureSwitch Portal.

Once all the details are complete, clicking Submit Request will start the matching process.

If the matching process fails, the details provided can be amended and the match request resubmitted.

Matched Gaining Switch Case

On receipt of a successful match the switch case will move to the matched step of the process.



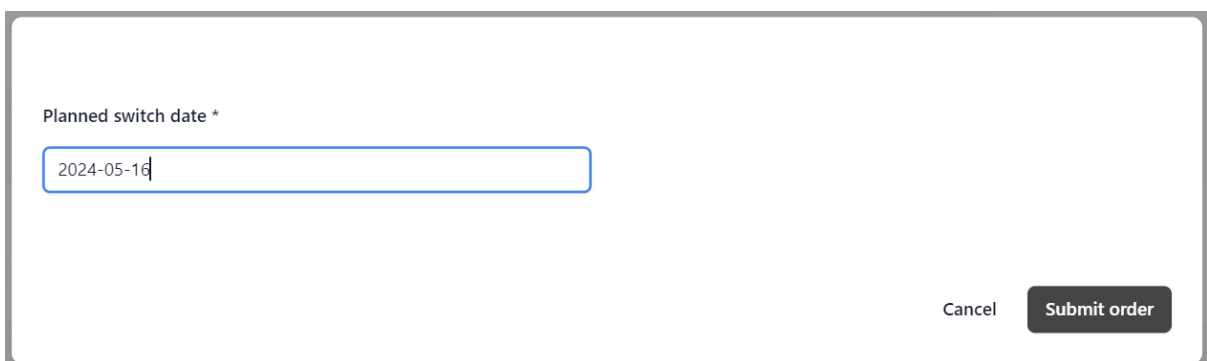
The Match Result section shows the matched date, and information about how and when implications of switching were sent to the customer by their existing provider.

The Available Switch Orders section shows the switch options given by the losing provider, generally this will be a single option, matching the customer request. However, it is possible for the losing provider to also provide alternative options. For example, if a customer requested to cease their broadband and retain their telephony service, the alternative option could be to cease both services.

Once successfully matched, a switch case can be ordered.

Ordering a Gaining Switch Case

Ordering a switch case via the SureSwitch Portal is very simple, just click Order this switch, for the required switch option. This displays a date field for the planned switch date to be selected.



Select the required switch date and click Submit order. If for any reason, the order process fails, it can be reordered by selecting the Reorder option from the Actions menu.

When a successful response is received the selected switch option is now displayed as ordered, with the date, and the expected switch date. From this stage in the process the switch can be updated, activated, or cancelled.

The screenshot shows a web application interface for managing switch cases. On the left is a dark sidebar with navigation options: Dashboard, Gaining Switches, Losing Switches, Provider Listing, Gaining Reports, and Losing Reports. The main content area has a top navigation bar with a user profile 'April May' and a progress bar with four stages: Matching (checked), Matched (checked), Ordered (checked), and Activated (not checked). Below the progress bar is the 'Gaining Switch' section, which includes an 'Actions' menu with options: Update Order, Cancel Order, and Trigger Activation. The 'Gaining Switch' section contains the following data:

Gaining provider	Losing provider	Customer
Buddy Broadband	Zentive-Test	Dermot Brown 33 STUBBINGTON AVENUE PORTSMOUTH PO2 6JD
Gaining RCPID	Losing RCPID	
RGTV	RLGF	
Order ID	Losing account	
BBPG-0493	A11920145	
Our reference		
ZEN-0000-00057		

Below this is the 'Match Result' section:

Implications sent	Matched date	Expected switch date
Email: s*****n@gzantive.com Sent by: 7th Jan 2025 at 07:58	7th Jan 2025	10th Jan 2025

Finally, the 'Ordered Switch' section shows the 'Switch order' details:

Order reference	Date ordered
eb83439e-edb8-4ecb-8d25-569b508d5c0f	7th Jan 2025

Below this is a table for the switch order details:

Service	Switch action	Identifier
Broadband	Service found (cease)	NetworkOperator: A001

Updating a Gaining Switch Case

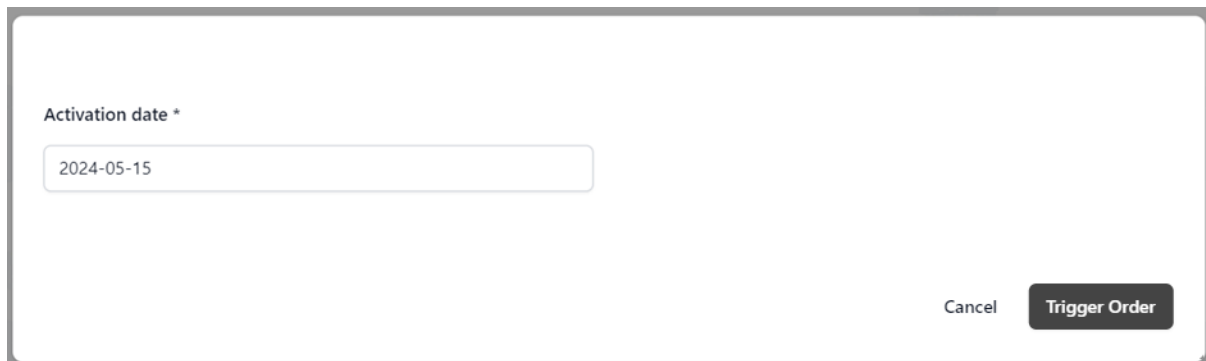
An ordered switch case can have the planned switch date updated by selecting Update order from the Actions menu. Then simply enter the new planned switch date and click Update order. Ordered switch cases can be updated as many times as necessary before a trigger disconnection request is sent to the losing provider.

The screenshot shows a modal form for updating a switch case. It has a title 'New planned switch date *' and a text input field containing the date '2024-05-17'. At the bottom right of the modal are two buttons: 'Cancel' and 'Update order'.

Triggering a Gaining Switch Case

When a switch has been completed, a trigger order is sent to the losing provider instructing them to cease services and billing. When the trigger is ordered, the activation date is set confirming the date that the gaining provider completed the switch process.

To set the activation date, select Trigger Activation from the Actions menu, enter the date the switch was completed and click Trigger Order.

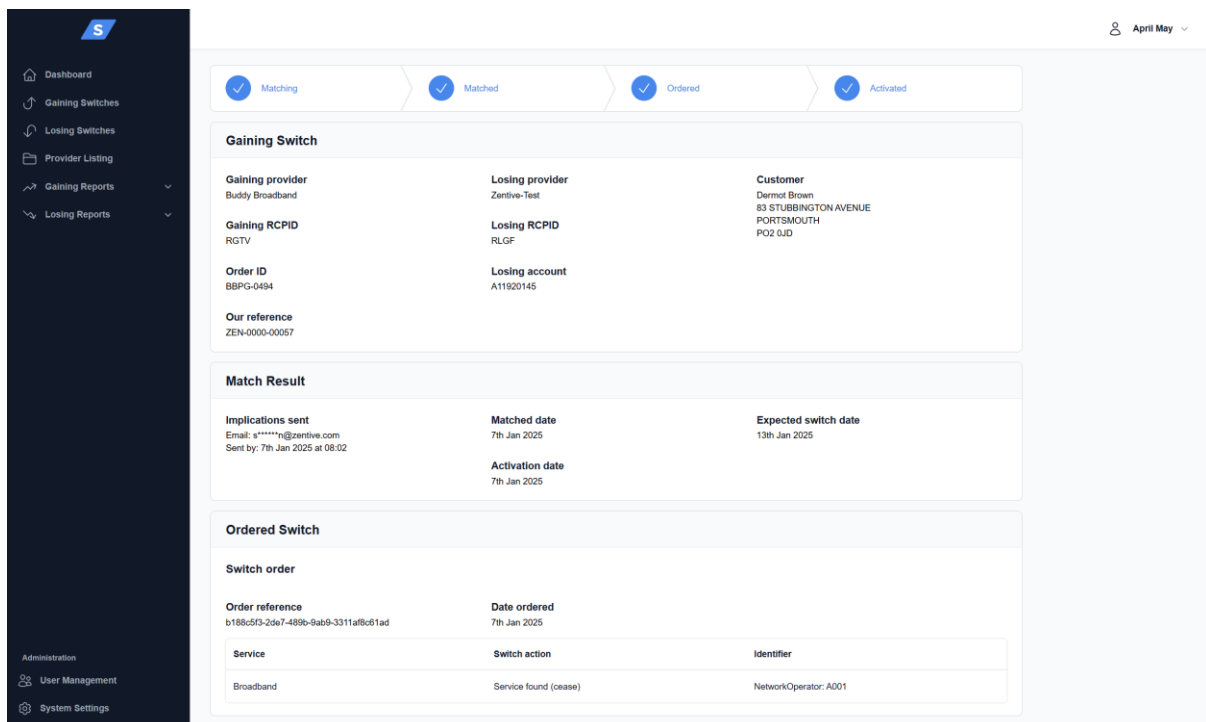


Activation date *

2024-05-15

Cancel Trigger Order

If the trigger activation fails it can be re-triggered by again selecting Trigger Activation from the Actions menu. Once a successful trigger response is received the process is complete and the activation date is displayed against the switch order.



April May

Matching Matched Ordered Activated

Gaining Switch

Gaining provider Buddy Broadband	Losing provider Zenive-Test	Customer Dermot Brown 83 STUBBINGTON AVENUE PORTSMOUTH PO2 6JD
Gaining RCPID RGTV	Losing RCPID RLGF	
Order ID BBPG-0494	Losing account A11920145	
Our reference ZEN-0000-00057		

Match Result

Implications sent Email: s*****n@zenive.com Sent by: 7th Jan 2025 at 08:02	Matched date 7th Jan 2025	Expected switch date 13th Jan 2025
	Activation date 7th Jan 2025	

Ordered Switch

Switch order

Order reference b188c5f3-2de7-489b-9ab9-3311a18c61ad	Date ordered 7th Jan 2025	
Service Broadband	Switch action Service found (cease)	Identifier NetworkOperator: A001

Once a Trigger Activation request has been confirmed by the losing provider, the switch can no longer be updated or cancelled.

Cancelling a Gaining Switch Case

Switch cases that have been ordered or updated, and not yet triggered, can be cancelled by selecting Cancel Order from the Actions menu. When the cancel option is selected it must be confirmed to ensure that cancellation is required. Confirming the cancellation notifies the losing provider that the switch should no longer be processed.

When a cancellation confirmation response has been received, the switch can no longer proceed.

Losing Switches

The SureSwitch Portal allows you to view your losing switch cases throughout the process to their completion.

Selecting the Losing Switches menu option displays a list of losing switch cases currently in your system, showing a summary of information including status, planned switch date, and gaining provider. Losing switches that have not been updated within the last 60 days will be marked as abandoned. These switches can be displayed by checking the Show abandoned checkbox.

If the account has multiple registered brands, the Losing Switches view will include a filter for Losing provider and will also include the Losing Provider in the table. Full switch case details can be viewed from here.

The screenshot shows the 'Losing Switches' dashboard. On the left is a dark sidebar with navigation options: Dashboard, Gaining Switches, Losing Switches (selected), Provider Listing, Gaining Reports, and Losing Reports. Below this are 'Administration' options: User Management and System Settings. The main content area has a title 'Losing Switches' and filters for 'Generated/Switch order reference', 'Switch status', 'Gaining provider / RCPID', and a 'Show abandoned' checkbox. The table below contains the following data:

Created Date	Generated Reference	Status	Ordered Switch Order Reference	Planned Switch Date	Gaining Provider
17th Dec 2024 at 11:06	BBPL-0061	Match success			Buddy Broadband
13th Dec 2024 at 16:04	BBPL-0060	Match success			Buddy Broadband
13th Dec 2024 at 15:57	BBPL-0059	Match failed			Buddy Broadband
13th Dec 2024 at 12:42	BBPL-0058	Match failed			Buddy Broadband
13th Dec 2024 at 12:27	BBPL-0057	Match failed			Buddy Broadband
26th Nov 2024 at 11:53	BBPL-0056	Match success			Grapevine CP Junior
25th Nov 2024 at 08:31	BBPL-0055	Match success			Buddy Broadband
25th Nov 2024 at 08:29	BBPL-0054	Match failed			Buddy Broadband
19th Nov 2024 at 08:02	BBPL-0053	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:46	BBPL-0052	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:44	BBPL-0051	Match success			ZENTIVE CABLE LIMITED
18th Nov 2024 at 08:50	BBPL-0050	Match success			Buddy Broadband
7th Nov 2024 at 08:46	BBPL-0044	Update success	bdbb5e1f-c3e9-41e2-93f3-fb0a4ae3f80a	19th Nov 2024	Buddy Broadband
4th Nov 2024 at 11:34	BBPL-0027	Trigger success	6fc162fd-7472-4397-8f9b-73d4e6f2a8c4	5th Nov 2024	Buddy Broadband

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Selecting any losing switch case displays more details.

Example of a triggered switch case:

This screenshot is identical to the one above, showing the 'Losing Switches' dashboard with the same table of switch records. The table contains 15 rows of data, including details like 'Created Date', 'Generated Reference', 'Status', 'Ordered Switch Order Reference', 'Planned Switch Date', and 'Gaining Provider'. The last row shows a 'Trigger success' for BBPL-0027 on 4th Nov 2024, with an 'Ordered Switch Order Reference' of 6fc162fd-7472-4397-8f9b-73d4e6f2a8c4 and a 'Planned Switch Date' of 5th Nov 2024.

Provider Listing

The Provider Listing screen returns a list of all provider names and their id as registered with TOTSCO Hub.

The screenshot displays a web application interface. On the left is a dark sidebar with navigation links: Dashboard, Gaining Switches, Losing Switches, Provider Listing (highlighted), Gaining Reports, Losing Reports, Administration, User Management, and System Settings. The main content area is titled 'Provider Listing' and features a search input field labeled 'Provider name / RCPID'. Below the search field is a table with two columns: 'Provider Name' and 'RCPID'. The table contains 15 rows of data.

Provider Name	RCPID
Ask4	RSDH
ASL	RPYC
attend2IT	RFGC
Audra Solutions Limited	RVYT
Auxilio IT	RWDT
Avila Group	RJKT
Azotel Technologies	RXTY
Azro Ltd	RHHQ
B4B Telecoms Ltd	RJDF
B4RIK	RLPD
Babbacombe Computers Ltd	RJNM
Badenoch Broadband	RWMD
Ballscoligne	RLMX
Be Fibre Limited	RCTX

Reports

Selecting Gaining or Losing Reports from the menu displays the reports available to be run against the gaining or losing switch cases associated with the provider account.

Switch Summary Report

The Switch Summary Report is available for both gaining and losing switches. The report is simply run by clicking Generate Report. With the default filters applied this will return all gaining or losing switches for the past month. The results can be filtered by date period up to a maximum of one year, switch status, and gaining or losing provider. Checking the Show abandoned checkbox will also include abandoned switches. Each row in the results can be selected to view the switch details, and all results can be exported to Excel.

If the account has multiple registered brands, the Gaining Summary report will also include the option to filter by gaining provider, and the Losing Summary report will include the option to filter by losing provider.

Losing Switches

Generated/Switch order reference: Switch status: Gaining provider / RCPID: Show abandoned

Created Date	Generated Reference	Status	Ordered Switch Order Reference	Planned Switch Date	Gaining Provider
17th Dec 2024 at 11:06	BBPL-0061	Match success			Buddy Broadband
13th Dec 2024 at 16:04	BBPL-0060	Match success			Buddy Broadband
13th Dec 2024 at 15:57	BBPL-0059	Match failed			Buddy Broadband
13th Dec 2024 at 12:42	BBPL-0058	Match failed			Buddy Broadband
13th Dec 2024 at 12:27	BBPL-0057	Match failed			Buddy Broadband
28th Nov 2024 at 11:53	BBPL-0056	Match success			Grapevine CP Junior
25th Nov 2024 at 08:31	BBPL-0055	Match success			Buddy Broadband
25th Nov 2024 at 08:29	BBPL-0054	Match failed			Buddy Broadband
19th Nov 2024 at 08:02	BBPL-0053	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:46	BBPL-0052	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:44	BBPL-0051	Match success			ZENTIVE CABLE LIMITED
18th Nov 2024 at 08:50	BBPL-0050	Match success			Buddy Broadband
7th Nov 2024 at 08:46	BBPL-0044	Update success	bdbb5e9f-c3e9-41e2-93f3-fb0a4ae3980a	19th Nov 2024	Buddy Broadband
4th Nov 2024 at 11:34	BBPL-0027	Trigger success	6fc162fd-7472-4397-8f9b-73da6e72a8c4	5th Nov 2024	Buddy Broadband

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Pending Switches Report

The Pending Switches Report is available for both gaining and losing switches and is run by clicking Generate Report. With the default filters applied this will return all gaining or losing switches for the past month that are pending activation. This means, the switch case is in a triggerable state, and the planned switch date is today or in the future.

The results can be filtered by a date period up to a maximum of one year and gaining or losing provider. Each row in the results can be selected to view the switch details, and all results can be exported to Excel.

If the account has multiple registered brands, the Gaining Pending report will also include the option to filter by gaining provider, and the Losing Pending report will include the option to filter by losing provider.

Losing Switches

Generated/Switch order reference: Switch status: Gaining provider / RCPID: Show abandoned

Created Date	Generated Reference	Status	Ordered Switch Order Reference	Planned Switch Date	Gaining Provider
17th Dec 2024 at 11:06	BBPL-0061	Match success			Buddy Broadband
13th Dec 2024 at 16:04	BBPL-0060	Match success			Buddy Broadband
13th Dec 2024 at 15:57	BBPL-0059	Match failed			Buddy Broadband
13th Dec 2024 at 12:42	BBPL-0058	Match failed			Buddy Broadband
13th Dec 2024 at 12:27	BBPL-0057	Match failed			Buddy Broadband
28th Nov 2024 at 11:53	BBPL-0056	Match success			Grapevine CP Junior
25th Nov 2024 at 08:31	BBPL-0055	Match success			Buddy Broadband
25th Nov 2024 at 08:29	BBPL-0054	Match failed			Buddy Broadband
19th Nov 2024 at 08:02	BBPL-0053	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:46	BBPL-0052	Match success			ZENTIVE CABLE LIMITED
19th Nov 2024 at 07:44	BBPL-0051	Match success			ZENTIVE CABLE LIMITED
18th Nov 2024 at 08:50	BBPL-0050	Match success			Buddy Broadband
7th Nov 2024 at 08:46	BBPL-0044	Update success	bdbb5ef1-c3e9-41e2-93f3-fb0a4ae3f80a	19th Nov 2024	Buddy Broadband
4th Nov 2024 at 11:34	BBPL-0027	Trigger success	6fc162fd-7472-4397-8f9b-73da6ef2a8c4	5th Nov 2024	Buddy Broadband

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Overdue Switches Report

The Overdue Switches Report is available for both gaining and losing switches and is run by clicking Generate Report. With the default filters applied this will return all gaining or losing switches for the past month that are overdue for activation. This means, the switch case is in a triggerable state, and the planned switch date is in the past.

The results can be filtered by a date period up to a maximum of one year and gaining or losing provider. Each row in the results can be selected to view the switch details, and all results can be exported to Excel.

If the account has multiple registered brands, the Gaining Overdue report will also include the option to filter by gaining provider, and the Losing Overdue report will include the option to filter by losing provider.

Gaining Report - Overdue Switches

01/07/2024 - 07/01/2025 Losing provider / RCPID [Generate Report](#) [Export to Excel](#)

Created Date	Status	Losing Provider	Planned Switch Date	Postcode	Fault Message
20th Nov 2024 at 16:55	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Trigger request discarded due to timeout
20th Nov 2024 at 16:54	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Trigger request discarded due to timeout
20th Nov 2024 at 16:40	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Response from Zentive-Test: Switch order reference is no longer available
20th Nov 2024 at 16:15	Order success	Zentive-Test	27th Nov 2024	PO2 0JD	
20th Nov 2024 at 12:48	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Response from Zentive-Test: Switch order reference is no longer available
20th Nov 2024 at 12:42	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Response from Zentive-Test: Switch order reference is no longer available
20th Nov 2024 at 12:41	Order success	Zentive-Test	27th Nov 2024	PO2 0JD	
20th Nov 2024 at 12:37	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Trigger request discarded due to timeout
20th Nov 2024 at 12:33	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Trigger request discarded due to timeout
20th Nov 2024 at 12:21	Trigger failed	Zentive-Test	27th Nov 2024	PO2 0JD	Response from Zentive-Test: Switch order reference is no longer available
20th Nov 2024 at 12:15	Update failed	Zentive-Test	27th Nov 2024	PO2 0JD	Update request discarded due to timeout
20th Nov 2024 at 12:04	Update failed	Zentive-Test	27th Nov 2024	PO2 0JD	Update request discarded due to timeout
19th Nov 2024 at 14:19	Trigger failed	Zentive-Test	26th Nov 2024	PO2 0JD	Trigger request discarded due to timeout
19th Nov 2024 at 14:16	Update failed	Zentive-Test	26th Nov 2024	PO2 0JD	Update request discarded due to timeout

User Management

The User Management screen is accessible if your profile has an admin role.

User Management [Create New](#)

Name Roles User Status

Login Email	Name	Roles	Status
jeff.palmer@tippytelecoms.com	Jeff Palmer	Admin, Gaining, Losing	Active
charlote.smith@tippytelecoms.com	Lottie Smith	Losing	Active
grayson.chambers@tippytelecoms.com	Gray Chambers	Gaining	Active
anna.black@tippytelecoms.com	Anna Black	Gaining, Losing	Disabled

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Create a User

As an Administrator, you can invite as many users to the SureSwitch Portal as required, those users just need an email address to receive the invitation and complete their account setup.

To create a new user, click Create New, all the fields are mandatory so enter the login email address, user first and last names and select the required roles.

The screenshot shows a 'Create User' form with the following fields and values:

- Login Email:** cliff.matthews@tippytelecommunications.com
- Status:** INVITED
- First Name:** Cliff
- Last Name:** Matthews

The **Roles** dropdown menu is open, showing the following options:

- Admin
- Gaining** (selected)
- Losing

At the bottom right of the form, there are two buttons: **Cancel** and **Create**.

Clicking Create commits the details to the account and sends an invitation to the user's login email address.

On receipt of the Welcome email, the new user should continue to set up their account. Clicking Set Up Account will navigate them to the Register User screen, where they can create, confirm, and set their password.

Users with a status of Invited cannot login to the SureSwitch Portal until they have completed their account set up. The invitation expires after 24 hours. Administrators can resend an invitation to a user's login email address should the invitation expire, or the initial email be lost, replacing the previous invitation.

Edit a User

As an Administrator, you can edit existing user details. From the User Management screen, select edit and the Edit User screen is displayed.

Example edit user screen with all possible available options.

The screenshot shows the 'Edit User' interface. It features several input fields and a list of roles. The 'Login Email' field contains 'petra.james@tippytelecommunications.com'. The 'Status' field is set to 'ACTIVE'. The 'First Name' field contains 'Petra' and the 'Last Name' field contains 'James'. The 'Roles' field is a multi-select list containing 'Admin', 'Gaining', and 'Losing'. Below the roles, there is a checked checkbox for 'Multi-factor enabled'. At the bottom, there are several action buttons: 'Re-send Invitation', 'Enable Login', 'Reset Password', 'Disable Login', 'Delete User', 'Cancel', and a dark 'Update' button.

Login Email, First and Last names, and Roles can be modified, and changes confirmed by selecting Update.

When multi-factor authentication is set as enabled for the account, the Multi-factor enabled checkbox will be displayed checked and disabled. Where multi-factor authentication is not set by account, it can be enabled and disabled for individual users.

For active users, you can choose to reset a password which will trigger an email to the user's login email address. The login can also be disabled to temporarily prevent the user from accessing the Portal or deleted to permanently remove the user from the account.

Users with a login status of disabled can be re-enabled, allowing access to the Portal to be restored, or the user can be deleted.

User Roles

There are two types of users in the SureSwitch Portal, admin and non admin users and this is defined by the roles they are given. There are three roles available, admin, gaining and losing.

Admin Role

This gives you access to everything, User Management, System Settings, Reports and both the Gaining and Losing Switches.

Gaining Role

This allows you to create, manage and view gaining switch cases.

Losing Role

This allows you to view losing switch cases.

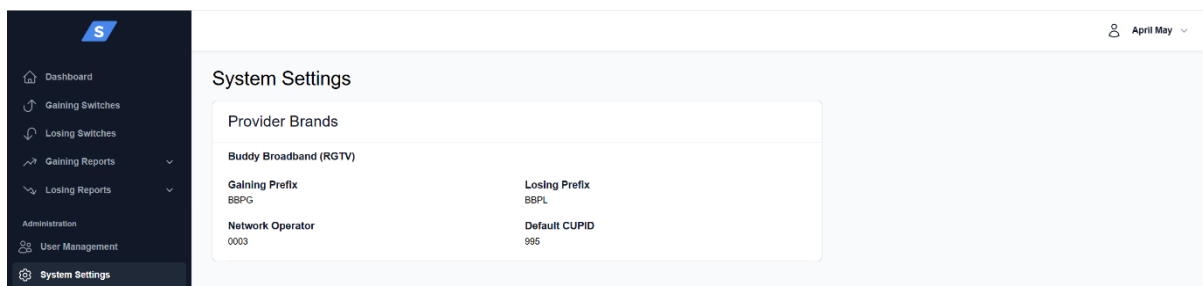
Change Password

Regardless of roles, all users can change their password, by selecting their name and then Change Password on menu bar. Simply enter your current password, a new password that meets the criteria, confirm the password and click Submit.

System Settings

The System Settings are only accessible if you have the administrator role. This will display Provider, Customer Matching, Switching Events and Switching API settings.

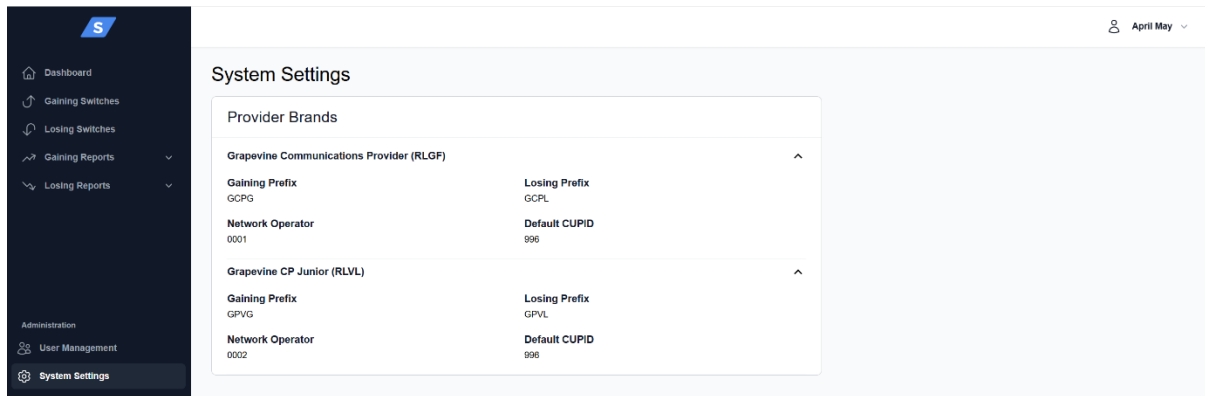
Provider Brands



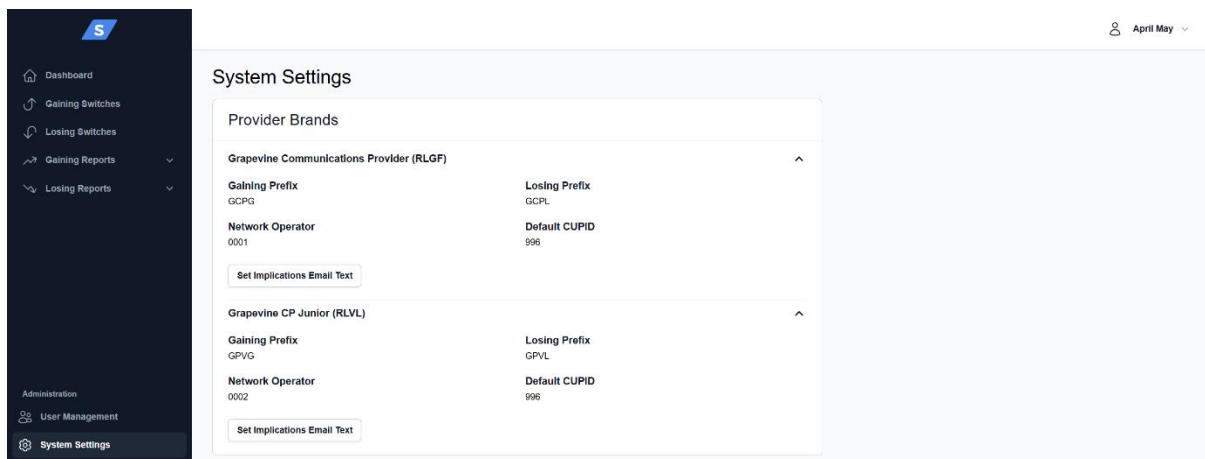
The screenshot shows the 'System Settings' page in the SureSwitch Portal. The left sidebar contains navigation options: Dashboard, Gaining Switches, Losing Switches, Gaining Reports, Losing Reports, Administration (User Management), and System Settings (highlighted). The main content area is titled 'System Settings' and features a 'Provider Brands' section for 'Buddy Broadband (RGTV)'. This section contains two columns of settings:

Provider Brands	
Buddy Broadband (RGTV)	
Gaining Prefix BBPG	Losing Prefix BBPL
Network Operator 0003	Default CUPID 995

The Provider Brands show the RCPID allocated by a Company's registration with the TOTSCo Hub, account name and prefixes for gaining and losing switch cases. The prefixes form part of an auto generated identifier for each gaining and losing switch case to enter the portal. If an account has multiple registered brands, then these details will be displayed when the expand arrow is selected.



When the Match Provider in Customer Matching is selected as Splynx, it will be possible to customise the header and footer text that is included in the switching implications email. The header and footer can be specific to each account brand.



The Set Implications Email Text button will only be displayed when Splynx is saved as the match provider. Clicking Set Implications Email Text displays the text that is currently being displayed in the implications email, this value could be the default text e.g. Here is your switching information as of today, or it could be the text held at account level, e.g. Please return your equipment within 14 days of your switch date. Either or both the header and footer text can be overwritten by setting new text in the Override text fields and clicking Save.

Implications Email Text

Active email footer text
Email footer set during account onboarding

Override email header text

Normal B I U List 1 List 2 Link Text

If override text is added it will be displayed here rather than as the active email header text

Override email footer text

Normal B I U List 1 List 2 Link Text

Insert text here ...

Cancel Save

Security

Multi-factor authentication is available to add an extra level of security for accessing SureSwitch. It can be enabled by SureSwitch account, as well as at an individual user level. To enable multi-factor authentication for all users of an account, check the Users must use multi-factor authentication checkbox within the Security section of the System Settings page.

The next time any user of the account logs in they will be prompted to enter the code they received via email along with their password.

Customer Matching

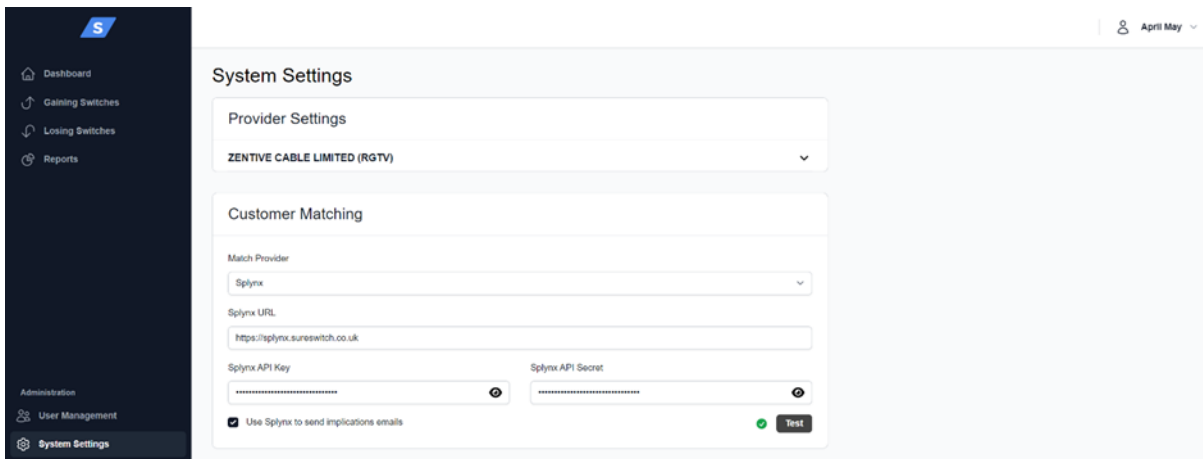
The screenshot shows the 'System Settings' page. The 'Customer Matching' section is highlighted, showing the following configuration:

Match Provider	Webhook URL	Webhook User	Webhook Password
Customer Matching Webhook	http://localhost:8080/matching/customer	*****	*****

The Customer Matching settings for Customer Matching Webhook and Splynx show the match provider, url, user and password required to connect your BSS to the SureSwitch Switching Engine. For Circuits, the api key and secret are required to connect to your Circuits application. These settings can be edited, should your Match Provider change.

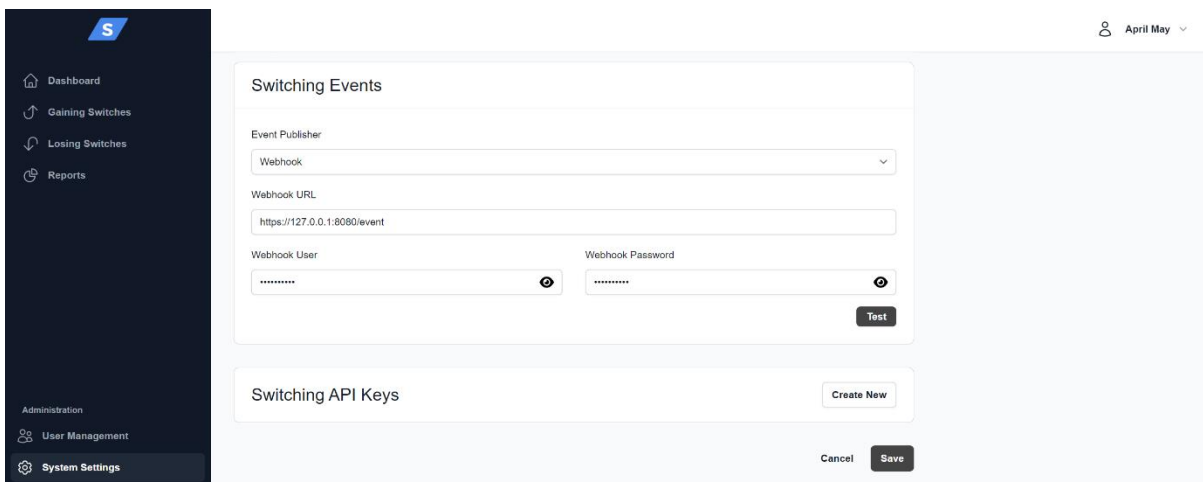
Whether the Match Provider is set as Splynx, Customer Matching Webhook or Circuits it is possible to test the connection by clicking the Test button. This will make a test call into your Splynx or Circuits instance or webhook using these settings and will return a success or failure message. For Customer Matching Webhook, you will additionally need to implement a GET method returning HTTP status 204 with no content.

If Splynx is selected as the Match Provider you have the option to use Splynx to send the implications emails, if the checkbox is unselected, the emails will be sent from SureSwitch.



Switching Events

Switching Events settings are required to enable SureSwitch to communicate with the TOTSCo Hub to process your gaining switch cases.



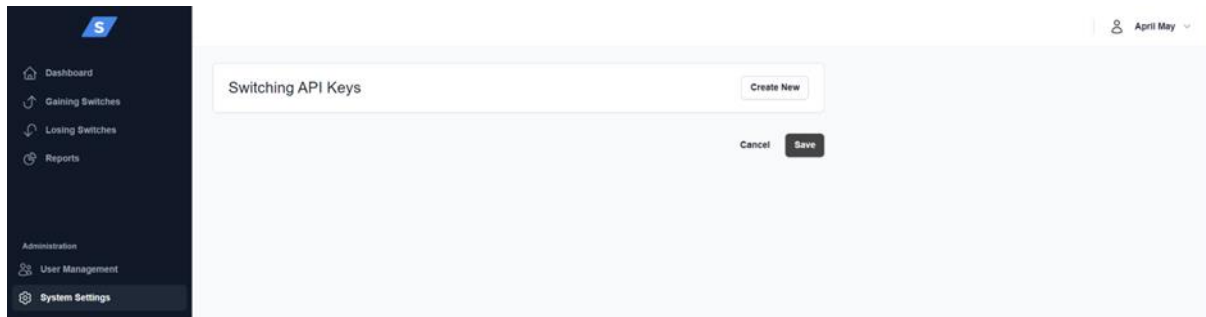
The Switching Events section shows the Event Publisher, webhook url, user and password for connecting the SureSwitch Switching Engine to your Customer BSS.

It is possible to test the connection by clicking the Test button. This will make a test call into your Splynx instance or webhook using these settings and will return a success or failure message. For WEBHOOK, you will additionally need to implement a GET method returning HTTP status 204 with no content.

Switching API Keys

Switching API Key settings are required to call the SureSwitch Switching APIs directly, integrating the switching process into your existing systems and sales journey.


To create a Switching API Key click the Create New button.



Enter a name for the key and click Add Key.

A screenshot of a form for adding a new API key. The form has a title 'API Key Name *' and a text input field containing 'TippyTelecomms'. At the bottom right of the form are 'Cancel' and 'Add Key' buttons.

The API Key is created and stored. Please note that the API Secret can only be viewed here, now and will not be accessible again.



API Key Created

Copy and store the API key and secret in a secure location.

**For security reasons, we cannot show the secret to you again.
If you lose it, you will need to create a new API key.**

API Key

817d1477fe3a4a09a13a6ed73aaa6612

API Secret

f6754d179d64417cbe04094db98d08d81838d8685ae145cdb5a00909c7794374

Close

In the event you lose the Secret or the Key is no longer needed it can be deleted by selecting the Delete button.

