



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
0.11	Added BCC Splynx emails and Delete Switches	11-Feb-25
0.12	Added Switching API base url and HMAC Key	10-Mar-25
	Added email header and footer placeholder text	18-Mar-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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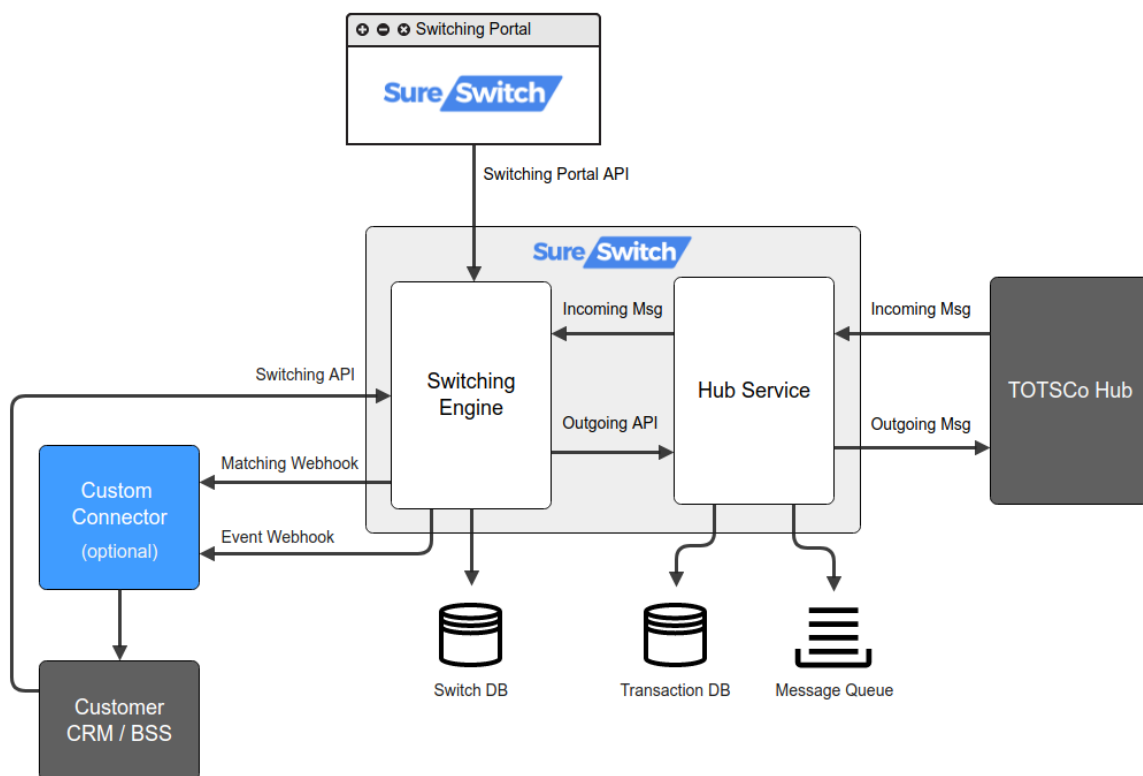
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Introduction

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 switches at any stage of the Switching process.

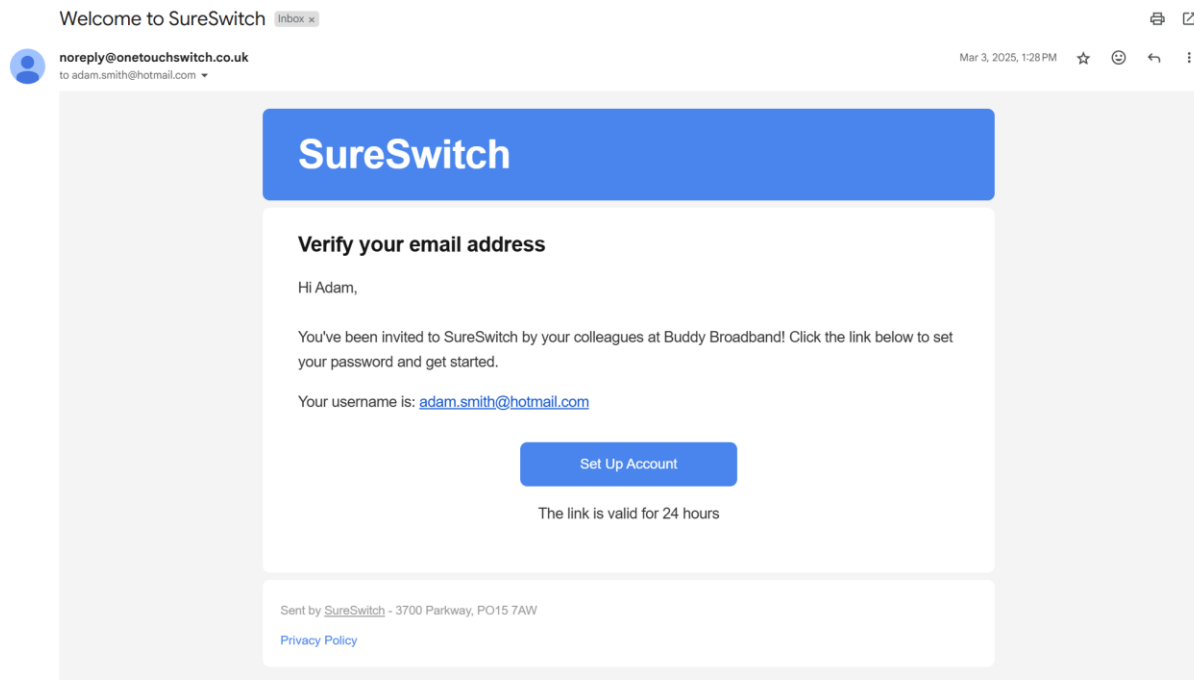
System Overview



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.

Login

Once account registration is complete, users will access the SureSwitch Portal via the login screen. The user must provide their email address and password and click Sign In. Three successive wrong attempts to login will lock the user's account for a short time.



Let's sign in.

Email address

you@example.com


Password

[Forgot password?](#)

Sign In

Clicking [Forgot password?](#) will navigate to the Password reset screen where the user email address can be entered and [Request reset](#) clicked. This sends an email to the user with a link to set a new password.

Password Reset Request Inbox x

 **noreply@onetouchswitch.co.uk**
to adam.smith@hotmail.com ▾

7:23 AM (3 minutes ago) ☆ ☺ ↶ ⋮

SureSwitch

Reset your password

Hi Adam,

Can't remember your password? Here's how to set a new one:

1. Click the link below
2. Choose and confirm a new password
3. Click Reset password

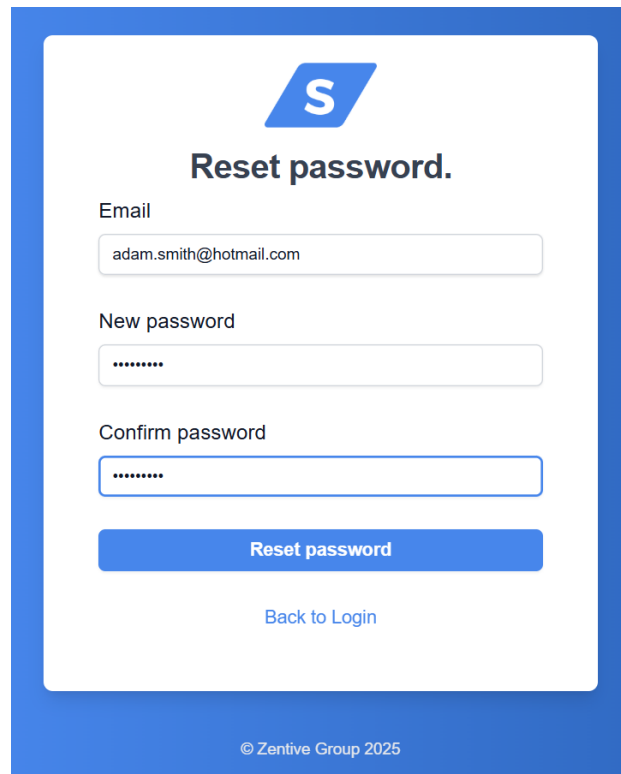
Reset Password

The link is valid for 1 hour

Sent by [SureSwitch](#) - 3700 Parkway, PO15 7AW

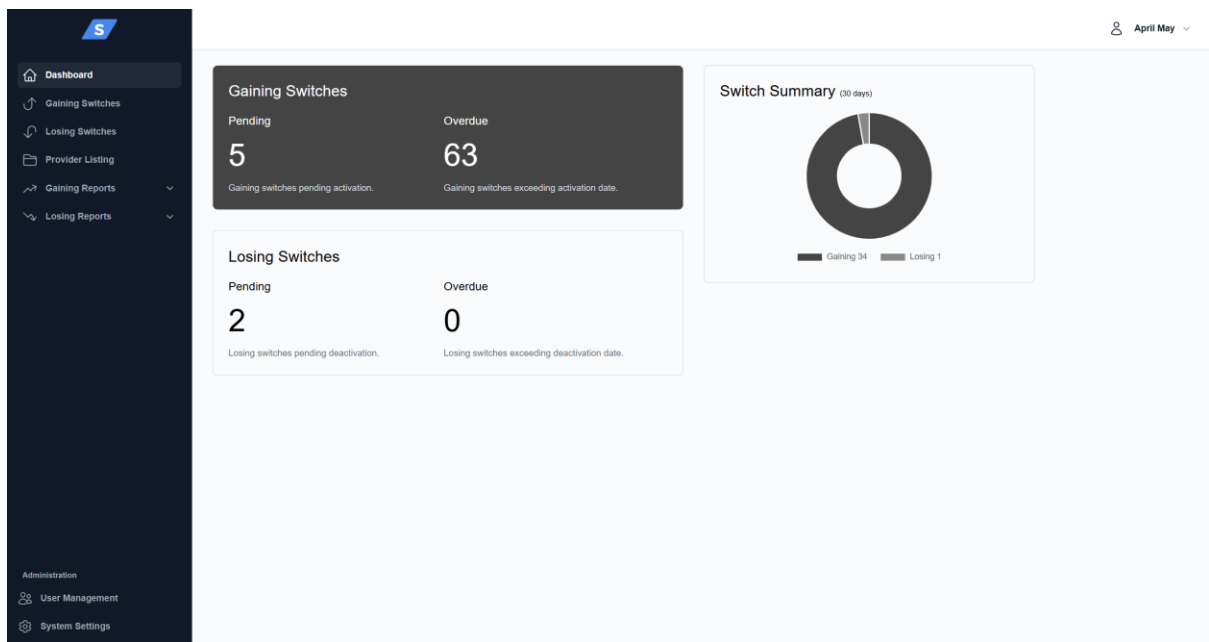
[Privacy Policy](#)

Clicking Reset Password navigates to the Reset Password screen where the email address, new password, and new password confirmation are entered.

A screenshot of a 'Reset password' form. The form is centered on a white background with a blue border. At the top is a blue logo with a white 'S'. Below the logo is the title 'Reset password.' in bold. The form contains three input fields: 'Email' with the text 'adam.smith@hotmail.com', 'New password' with masked characters '*****', and 'Confirm password' with masked characters '*****'. Below the input fields is a blue button labeled 'Reset password' and a blue link labeled 'Back to Login'. At the bottom of the form is a copyright notice '© Zentive Group 2025'.

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 switches 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 switches throughout the entire process to completion.

Selecting the Gaining Switches menu option displays a list of gaining switches 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.

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Dashboard
Gaining Switches
Losing Switches
Provider Listing
Gaining Reports
Losing Reports
Administration
User Management
System Settings

Generated Switch order reference
Switch status
Losing provider / RCPID
Show abandoned

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	9cbb4479-5f02-4a9d-b39d-683563812bc	12th Dec 2024	Zentive-Test
26th Nov 2024 at 17:18	BBPG-0466	Order failed	8668457b-4aa5-4c8b-81bc-7b9fd96d3d1	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 17:11	BBPG-0465	Cancel failed	1be282b7-750d-487b-91c7-af0fe25e18cb	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	2f93d2b5-c33f-48ed-9560-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	72520289-e3ac-49f7-9530-ee0095a9d4c0	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:36	BBPG-0456	Cancel failed	d93261c6-3db7-4e55-8e7a-dfa2711f365	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:20	BBPG-0455	Trigger failed	b1186575-2010-4fe9-b07d-c08cfa896c8	3rd Dec 2024	Zentive-Test
26th Nov 2024 at 16:17	BBPG-0454	Trigger failed	3869a0e7-37f4-4cd7-ba42-8035c0f6c407	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

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.

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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.

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- Losing Switches
- Provider Listing
- Gaining Reports
- Losing Reports

Administration

- User Management
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April May

New Gaining Switch

1 Matching

2 Matched

3 Ordered

4 Activated

Customer Details

Our reference

First nameLast name *

Address

Postcode / UPRN *

Address *

Losing Provider

Losing provider *

Losing provider account

Services

Service Type	Identifier	Action	Remove
Broadband		Cease	

Match Consent

Does the customer consent to their current provider sending leaving implications?

☒ Consent given *

Cancel
 Submit Request

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

Matched Gaining Switches

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

The screenshot displays the 'Matched' status of a switch order in the SureSwitch Portal. The interface features a sidebar with navigation links and a main content area with a progress bar. The 'Matched' step is active, and the 'Match Result' section shows the matched date and implications sent. The 'Available Switch Orders' section lists the order reference and the service details.

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 can be ordered.

Ordering a Gaining Switch

Ordering a switch 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.

The screenshot shows the 'Planned switch date' form. It includes a text input field with the date '2024-05-16' entered. Below the input field are two buttons: 'Cancel' and 'Submit order'.

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 the Zenitve dashboard with a dark sidebar on the left containing navigation links: Dashboard, Gaining Switches, Losing Switches, Provider Listing, Gaining Reports, and Losing Reports. The main content area displays a progress bar at the top with four stages: Matching (checked), Matched (checked), Ordered (checked), and Activated (4, indicating the current stage). Below the progress bar, the 'Gaining Switch' section lists details for 'Buddy Broadband' (Gaining provider), 'Zenitve-Test' (Losing provider), and 'Dermot Brown' (Customer). It also shows 'Gaining RCPID' (RGTV), 'Losing RCPID' (RLGF), 'Order ID' (BBPG-0493), 'Losing account' (A11920145), and 'Our reference' (ZEN-0000-00057). An 'Actions' menu is visible with options: Update Order, Cancel Order, and Trigger Activation. The 'Match Result' section shows 'Implications sent' (Email: s*****n@zenitve.com, Sent by: 7th Jan 2025 at 07:58), 'Matched date' (7th Jan 2025), and 'Expected switch date' (10th Jan 2025). The 'Ordered Switch' section shows 'Switch order' details: 'Order reference' (eb83439e-edb8-4ecb-8c25-569b508d5c0f), 'Date ordered' (7th Jan 2025), 'Service' (Broadband), 'Switch action' (Service found (cease)), and 'Identifier' (NetworkOperator: A001).

Updating a Gaining Switch

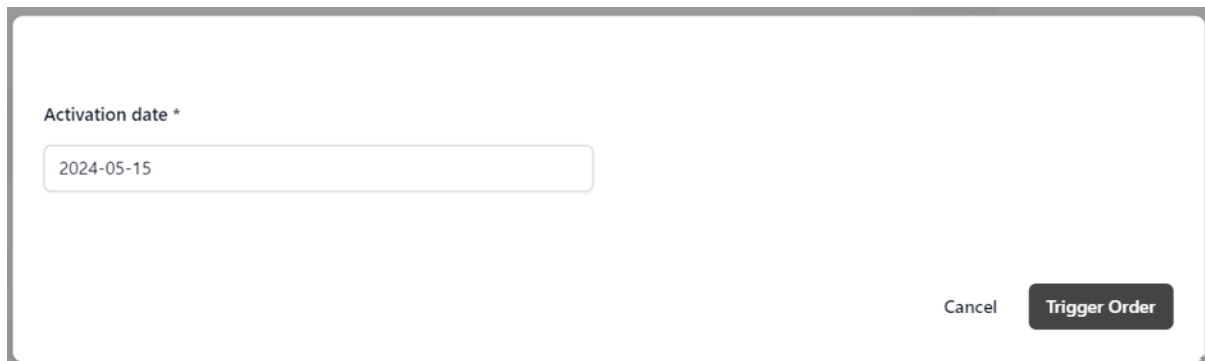
An ordered switch can have the planned switch date updated by selecting Update order from the Actions menu. Then simply enter the new planned switch date and click Update order. Ordered switches can be updated as many times as necessary before a trigger disconnection request is sent to the losing provider.

The screenshot shows a form titled 'New planned switch date *'. It contains a text input field with the date '2024-05-17'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Update order'.

Triggering a Gaining Switch

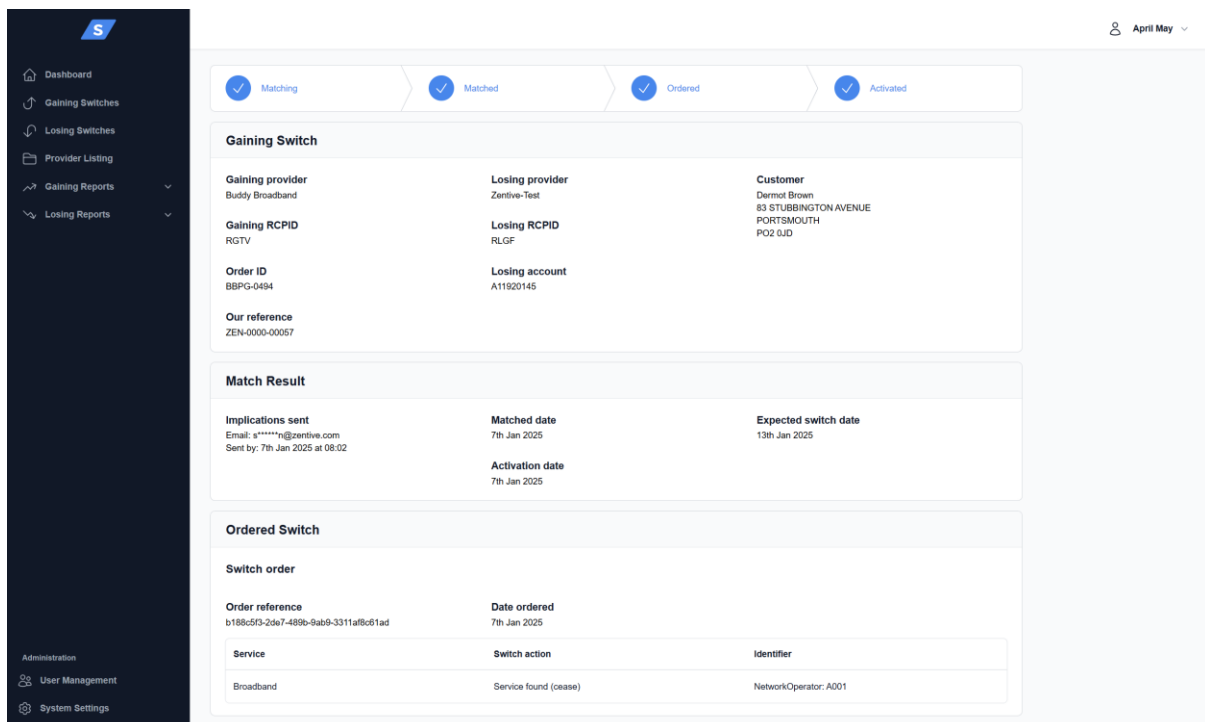
When a switch has been completed, a trigger order is sent to the losing provider instructing them to cease services and billing. When the trigger is ordered, the activation date is set confirming the date that the gaining provider completed the switch process.

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



A screenshot of a web form for triggering a switch. The form has a title "Activation date *" and a text input field containing "2024-05-15". At the bottom right, there are two buttons: "Cancel" and "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.



A screenshot of a web application showing the details of a switch order. The page has a dark sidebar on the left with navigation links: Dashboard, Gaining Switches, Losing Switches, Provider Listing, Gaining Reports, and Losing Reports. The main content area shows a progress bar with four steps: Matching, Matched, Ordered, and Activated. Below the progress bar, there are three sections: Gaining Switch, Match Result, and Ordered Switch.

Gaining Switch		
Gaining provider Buddy Broadband	Losing provider Zenitve-Test	Customer Dermot Brown 83 STUBBINGTON AVENUE PORTSMOUTH PO2 0JD
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@zenitve.com Sent by: 7th Jan 2025 at 08:02	Matched date 7th Jan 2025 Activation date 7th Jan 2025	Expected switch date 13th 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

Switches 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.

Deleting a Gaining Switch

Gaining switches that have been abandoned, successfully triggered or cancelled, or that have not been successfully matched can be deleted by selecting Delete Order from the Actions menu. When the delete option is selected it must be confirmed to ensure deletion is required. Confirming the deletion will remove the switch and all related details from the portal and database and cannot be undone.

The screenshot displays a web application interface for managing 'Gaining Switches'. On the left is a dark sidebar with navigation links: Dashboard, Gaining Switches, Losing Switches, Gaining Reports, Losing Reports, and Provider Listing. Below these are 'Administration' links: User Management and System Settings. The main content area has a top navigation bar with a user profile icon and the date 'April May'. Below this is a progress bar with four steps: Matching (checked), Matched (checked), Ordered (checked), and Cancelled (checked). A blue banner states 'This order was cancelled on 18th Jan 2025'. The main section is titled 'Gaining Switch' and contains a table with details for the 'Gaining provider' (Buddy Broadband), 'Losing provider' (Zeniva-Test), 'Customer' (Brown, BUTTERFLY COTTAGE, 83 STUBBINGTON AVENUE, PORTSMOUTH, PO2 0JD), 'Gaining RCPID' (RGTV), 'Losing RCPID' (RLGF), and 'Order ID' (BBPG-0541). An 'Actions' dropdown menu is open, showing 'Delete Order'. Below this is a 'Match Result' section with a table showing 'Implications sent' (Email: s*****n@zeniva.com, Sent by: 15th Jan 2025 at 10:52), 'Matched date' (15th Jan 2025), and 'Expected switch date' (14th Jan 2025). The 'Ordered Switch' section shows the 'Switch order' and 'Order reference' (11fe1e14-5663-4fa0-bcf0-fa3363ee267e). At the bottom is a table with columns 'Service', 'Switch action', and 'Identifier'.

Service	Switch action	Identifier
---------	---------------	------------

Switch match failures can be deleted by selecting the Delete Switch button on the New Gaining Switch screen and providing confirmation.

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Dashboard

Gaining Switches

Losing Switches

Gaining Reports

Losing Reports

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AdamAdmin GainingProvider

New Gaining Switch

1 Matching

2 Matched

3 Ordered

4 Activated

Response from Zentive-Test: No customers found with service at that location

Order ID

BBPG-0579

Customer Details

Our reference

First name

Last name *

Brown

Address

Postcode / UPRN

Search

UPRN

100062524744

Address line 1 *

1 WOODTHORPE GARDENS

Address line 3

Postcode *

SO31 7AR

Losing Provider

Losing provider *

Zentive-Test (RLGF)

Losing provider account

Services

Add +

Service Type	Identifier	Action	Remove
Broadband		Cease	

Match Consent

Does the customer consent to their current provider sending leaving implications?

☒ Consent given *

Cancel

Delete Switch

Resubmit Request

Losing Switches

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

Selecting the Losing Switches menu option displays a list of losing switches 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 details can be viewed from [here](#).

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Gaining Switches

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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
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	bdbb6e6f-c3e9-41e2-93f3-fb0a4ae3f80a	19th Nov 2024	Buddy Broadband
4th Nov 2024 at 11:34	BBPL-0027	Trigger success	6fc1626d-7472-4397-8f9b-73de6ef2a8c4	5th Nov 2024	Buddy Broadband

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Selecting any losing switch displays more details.

Example of a triggered switch:

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Losing Switches

Generated/Switch order reference

Switch status

Gaining provider / RCPID

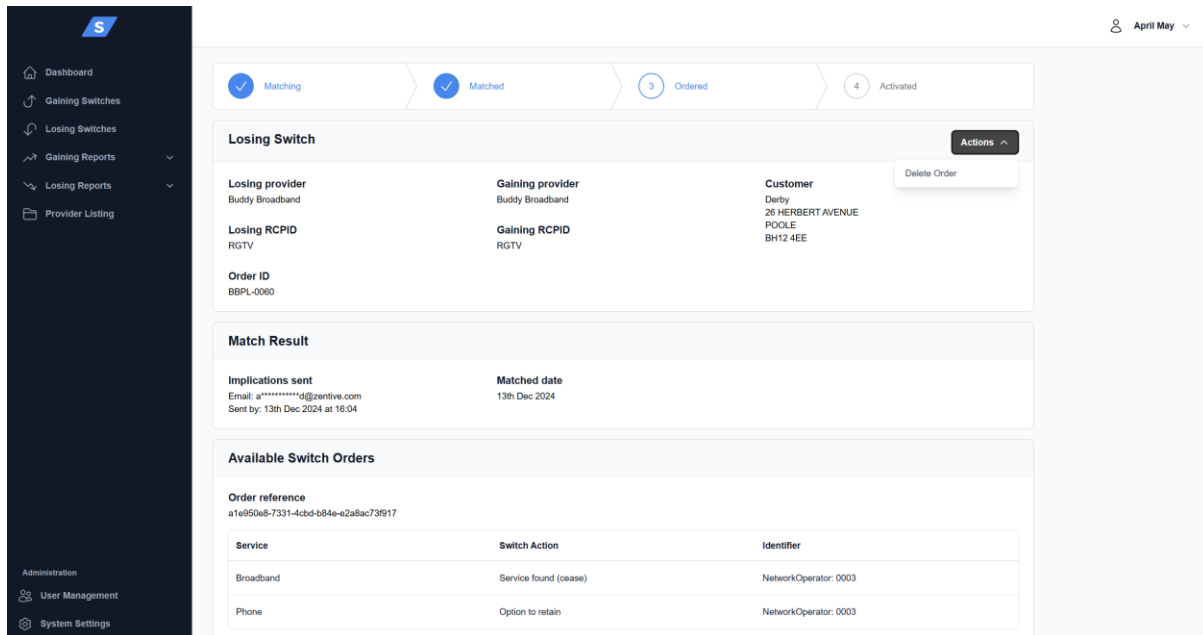
Show abandoned

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
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	bdbb6e6f-c3e9-41e2-93f3-fb0a4ae3f80a	19th Nov 2024	Buddy Broadband
4th Nov 2024 at 11:34	BBPL-0027	Trigger success	6fc1626d-7472-4397-8f9b-73de6ef2a8c4	5th Nov 2024	Buddy Broadband

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Deleting a Gaining Switch

Losing switches of any status can be deleted by selecting Delete Order from the Actions menu. When the delete option is selected it must be confirmed to ensure deletion is required. Confirming the deletion will remove the switch and all related details from the portal and database and cannot be undone. See also Account Settings



Dashboard

- Dashboard
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- Provider Listing

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April May

Matching **Matched** **Ordered** **Activated**

Losing Switch

Actions

Delete Order

Losing provider Buddy Broadband	Gaining provider Buddy Broadband	Customer Derby 28 HERBERT AVENUE POOLE BH12 4EE
Losing RCPID RGTV	Gaining RCPID RGTV	
Order ID BBPL-0060		

Match Result

Implications sent Email: a*****d@zenlive.com Sent by: 13th Dec 2024 at 16:04	Matched date 13th Dec 2024
---	--------------------------------------

Available Switch Orders

Order reference
a1e950e8-7331-4cbd-b84e-e2a8ac73917

Service	Switch Action	Identifier
Broadband	Service found (cease)	NetworkOperator: 0003
Phone	Option to retain	NetworkOperator: 0003

Provider Listing

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

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- Losing Switches
- Gaining Reports
- Losing Reports
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April May

Matching

Matched

Ordered

Activated

Losing Switch

Losing provider

Buddy Broadband

Gaining provider

Buddy Broadband

Customer

Derby

26 HERBERT AVENUE

POOLE

BH12 4EE

Losing RCPID

RGTV

Gaining RCPID

RGTV

Order ID

BBPL-0060

Actions

Delete Order

Match Result

Implications sent

Email: a*****d@zenlive.com

Sent by: 13th Dec 2024 at 16:04

Matched date

13th Dec 2024

Available Switch Orders

Order reference

a1e950e8-7331-4cbd-b84e-e2a8ac73f917

Service	Switch Action	Identifier
Broadband	Service found (cease)	NetworkOperator: 0003
Phone	Option to retain	NetworkOperator: 0003

Reports

Selecting Gaining or Losing Reports from the menu displays the reports available to be run against the gaining or losing switches 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.

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Dashboard
Gaining Switches
Losing Switches
Provider Listing
Gaining Reports
Losing Reports
Administration
User Management
System Settings

April May

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
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	bdbb5eff-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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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 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.

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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
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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	bdbb5eff-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 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.

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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 OJD	Trigger request discarded due to timeout
20th Nov 2024 at 16:54	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	Trigger request discarded due to timeout
20th Nov 2024 at 16:40	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	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 OJD	
20th Nov 2024 at 12:46	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	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 OJD	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 OJD	
20th Nov 2024 at 12:37	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	Trigger request discarded due to timeout
20th Nov 2024 at 12:33	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	Trigger request discarded due to timeout
20th Nov 2024 at 12:21	Trigger failed	Zentive-Test	27th Nov 2024	PO2 OJD	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 OJD	Update request discarded due to timeout
20th Nov 2024 at 12:04	Update failed	Zentive-Test	27th Nov 2024	PO2 OJD	Update request discarded due to timeout
19th Nov 2024 at 14:19	Trigger failed	Zentive-Test	26th Nov 2024	PO2 OJD	Trigger request discarded due to timeout
19th Nov 2024 at 14:16	Update failed	Zentive-Test	26th Nov 2024	PO2 OJD	Update request discarded due to timeout

User Management

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

S

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User Management

Create New

Name

Roles

User Status

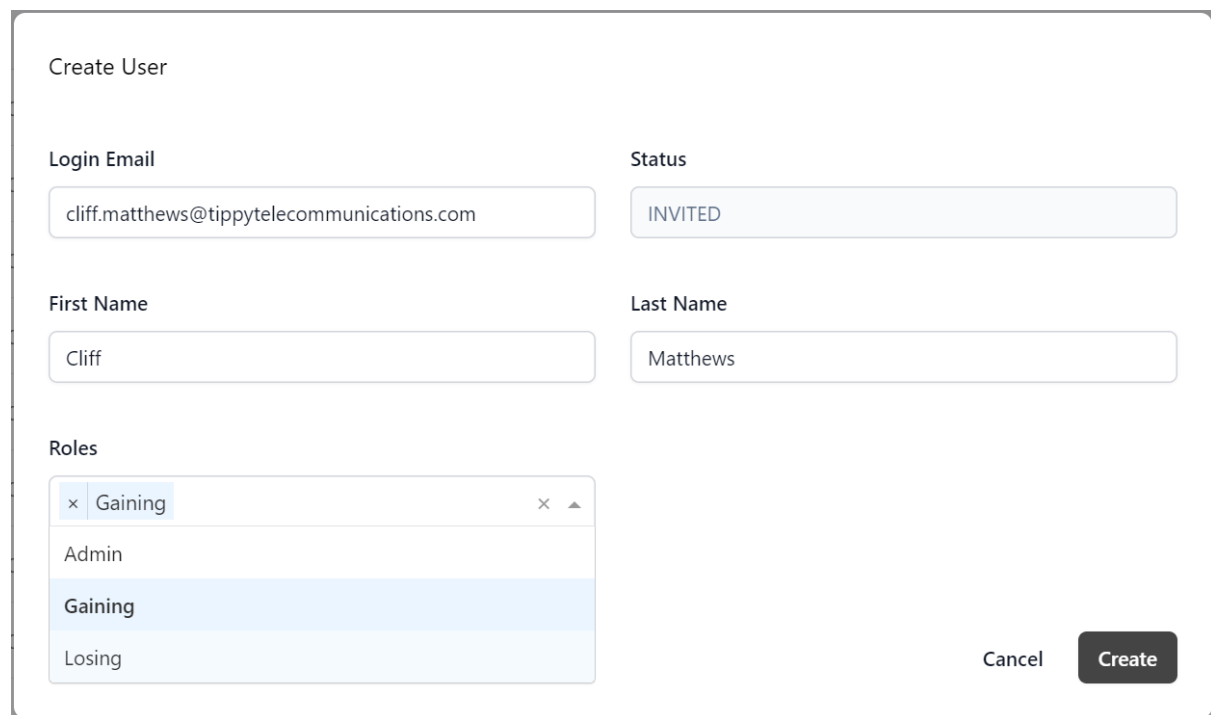
Login Email	Name	Roles	Status
jeff.palmer@tippytelecoms.com	Jeff Palmer	Admin, Gaining, Losing	Active
charlotte.smith@tippytelecoms.com	Lottie Smith	Losing	Active
grayson.chambers@tippytelecoms.com	Gray Chambers	Gaining	Active
anna.black@tippytelecoms.com	Anna Black	Gaining, Losing	Disabled

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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 'Create User' form is a web interface for adding new users. It features several input fields and a role selection dropdown. The 'Login Email' field contains 'cliff.matthews@tippytelecommunications.com'. The 'Status' dropdown is set to 'INVITED'. The 'First Name' field contains 'Cliff' and the 'Last Name' field contains 'Matthews'. The 'Roles' dropdown is open, showing a list with 'Gaining' selected. At the bottom right, there are 'Cancel' and 'Create' buttons.

Create User	
Login Email cliff.matthews@tippytelecommunications.com	Status INVITED
First Name Cliff	Last Name Matthews
Roles x Gaining x ▲ Admin Gaining Losing	
Cancel 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' form with the following details:

- Login Email:** petrajames@tippytelecommunications.com
- Status:** ACTIVE
- First Name:** Petra
- Last Name:** James
- Roles:** Admin, Gaining, Losing (indicated by 'x' icons and a dropdown arrow)
- Multi-factor enabled:** ☒ Multi-factor enabled
- 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 switches.

Losing Role

This allows you to view losing switches.

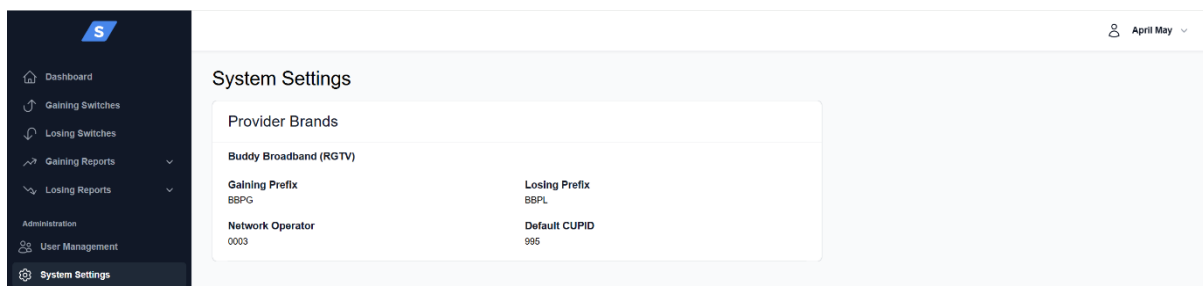
Change Password

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

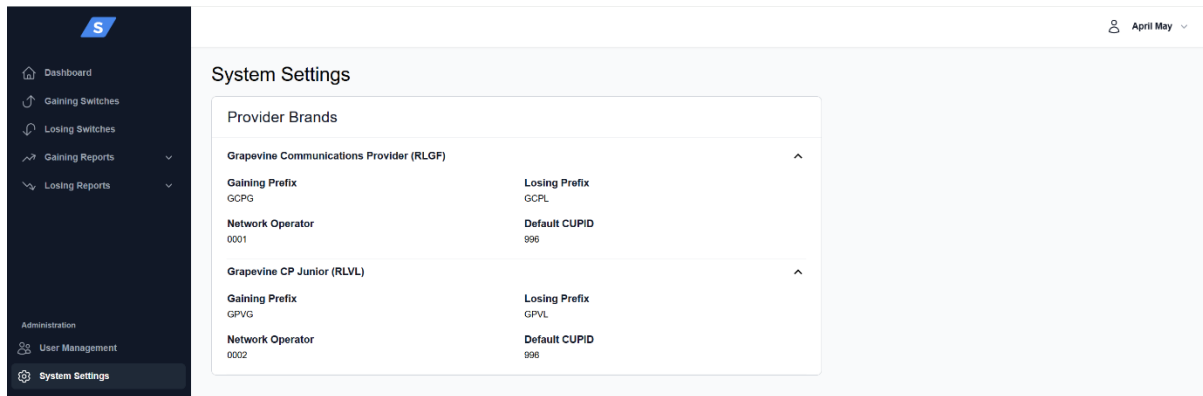


The screenshot shows the 'System Settings' page in the SureSwitch Portal. On the left is a dark sidebar with a menu containing: Dashboard, Gaining Switches, Losing Switches, Gaining Reports, Losing Reports, Administration, User Management, and System Settings (highlighted). The main content area is titled 'System Settings' and contains a 'Provider Brands' section. This section lists 'Buddy Broadband (RGTV)' with the following details:

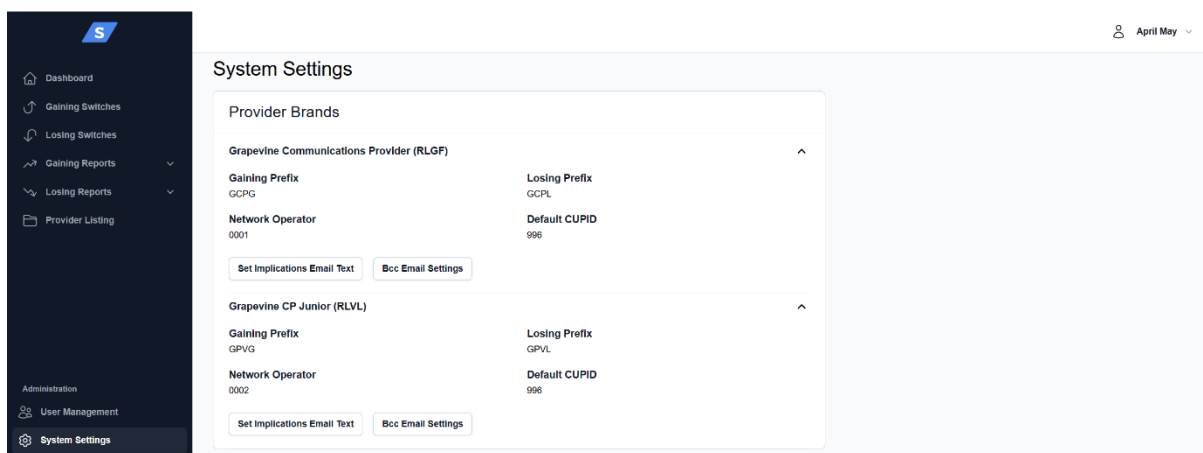
Buddy Broadband (RGTV)	
Gaining Prefix	Losing Prefix
BBPG	BBPL
Network Operator	Default CUPID
0003	995

In the top right corner of the main area, there is a user profile icon and the text 'April May' with a dropdown arrow.

The Provider Brands show the RCPID allocated by a Company's registration with the TOTSCo Hub, account name and prefixes for gaining and losing switches. The prefixes form part of an auto generated identifier for each gaining and losing switch 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 and add bcc emails to receive copies of the implication emails being sent. The header and footer and bcc emails are specific to each account brand.



Set Implications Email Text

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, including defined placeholders, in the Override text fields and clicking Save.

Buddy Broadband - Implications Email Text

Active email header text
This email header is at header level

Active email footer text
This email footer is at account level

Override email header text

Normal **B** *I* U [List Icons] [Link Icon] [Text Color Icon]

Footer details added \$(todaysDate) will override the header text set for \$(gainingProvider) account

Gaining provider Today's date

Override email footer text

Normal **B** *I* U [List Icons] [Link Icon] [Text Color Icon]

\$(gainingProvider) footer text

Gaining provider Today's date

Cancel Save

Bcc Email Settings

SureSwitch allows up to five blind carbon copy email addresses to be specified to receive a copy of the switching implications email that is sent to the customer. To add emails, select the Bcc Email Settings button, enter the email address and select Add, when all required emails have been added select Save.

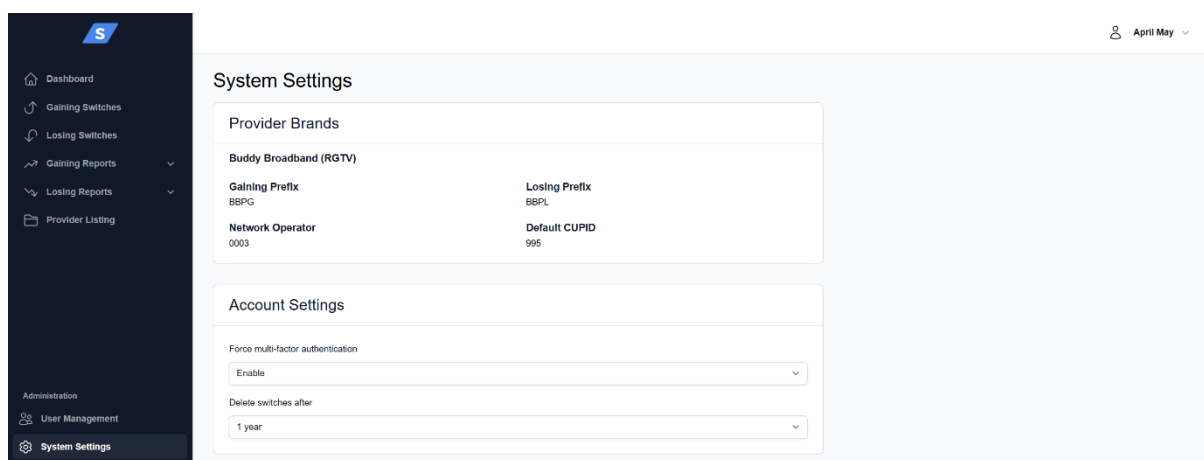
The screenshot shows the 'System Settings' page with a sidebar on the left containing links to Dashboard, Gaining Switches, Losing Switches, Gaining Reports, Losing Reports, and Provider Listing. The main content area is titled 'System Settings' and includes sections for 'Provider Brands' and 'Account Settings'. A modal window titled 'Grapevine Communications Provider - Bcc Email List' is open in the foreground. This modal has an input field with 'james@company.com' and an 'Add' button. Below the input field is a list of email addresses: 'losses@gcp.com', 'jamesjones@grapevine.com', and 'gcp@gcp.com', each with a trash icon to its right. At the bottom of the modal are 'Cancel' and 'Save' buttons. The background settings are dimmed, showing 'Grapevine Communications Provider (RLGF)' with 'Gaining Prefix' GCPG and 'Losing Prefix' GCPL, and 'Grapevine CP Ju' with 'Gaining Prefix' GPVG and 'Network Operator' 0002.

Account Settings

Multi-factor authentication

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, set Force multi-factor authentication to enabled within the Account Settings 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 receive via email along with their password.



The screenshot shows the 'System Settings' page in the SureSwitch application. On the left is a dark sidebar with navigation links: Dashboard, Gaining Switches, Losing Switches, Gaining Reports, Losing Reports, Provider Listing, Administration, User Management, and System Settings (highlighted). The main content area is titled 'System Settings' and contains two sections. The 'Provider Brands' section lists 'Buddy Broadband (RGTV)' and shows 'Gaining Prefix' as BBPG and 'Losing Prefix' as BBPL. It also shows 'Network Operator' as 0003 and 'Default CUPID' as 995. The 'Account Settings' section has two dropdown menus: 'Force multi-factor authentication' set to 'Enable' and 'Delete switches after' set to '1 year'. A user profile 'April May' is visible in the top right corner.

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

Account Settings	
Force multi-factor authentication	Enable
Delete switches after	1 year

Deleting switches

By default, SureSwitch will delete any switch that has not been updated for 6 years. The duration of switches stored can be lessened for the account, by setting the Delete switches after value in the Account Settings section of the System Settings. A nightly job runs to check for switches matching the criteria every midnight.

System Settings

Provider Brands

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

Account Settings

Force multi-factor authentication
Enable

Delete switches after
1 year

6 years
5 years
4 years
3 years
2 years
1 year
6 months

Customer Matching Webhook

Webhook URL
http://localhost:8080/matching/customer

Webhook User Webhook Password

Customer Matching

System Settings

Provider Brands

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

Account Settings

Force multi-factor authentication
Disable

Delete switches after
6 years

Customer Matching

Match Provider
Customer Matching Webhook

Webhook URL
http://localhost:8080/matching/customer

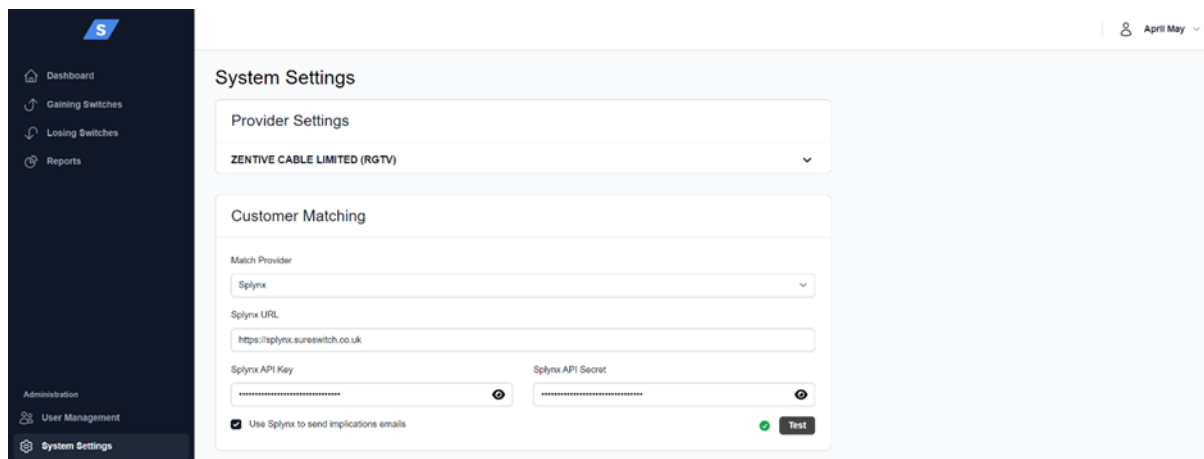
Webhook User Webhook Password

Test

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. The Test button is rate limited to prevent excessive attempts to connect to your webhook.

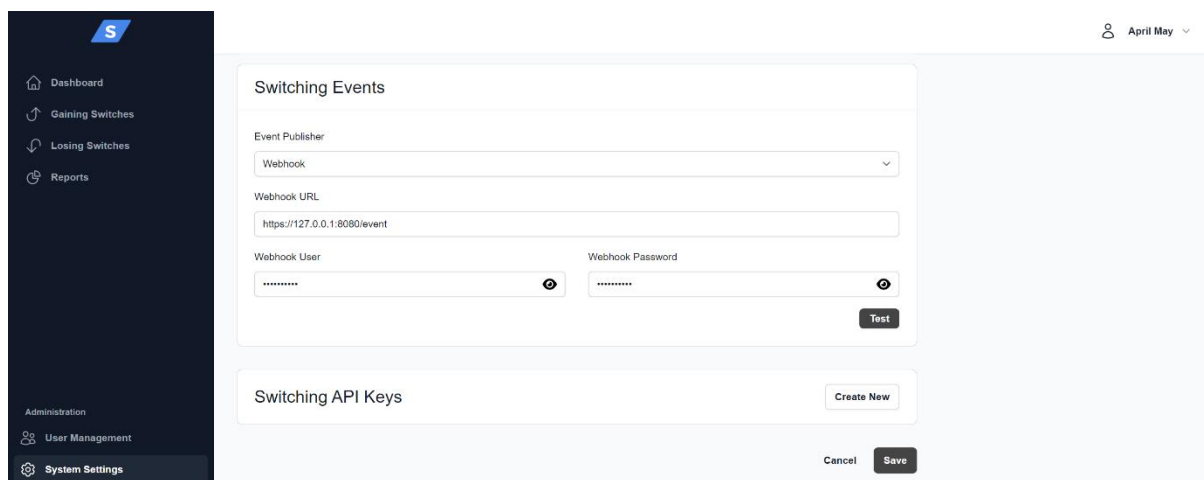
If Splynx is selected as the Match Provider you have the option to use Splynx to send the implications emails, if the checkbox is unselected, the emails will be sent from SureSwitch.



The screenshot shows the 'System Settings' page. On the left is a dark sidebar with a menu: Dashboard, Gaining Switches, Losing Switches, Reports, Administration, User Management, and System Settings (highlighted). The main content area has a top bar with a user icon and 'April May'. The 'System Settings' section includes a 'Provider Settings' dropdown set to 'ZENTIVE CABLE LIMITED (RGTV)'. Below is the 'Customer Matching' section with a 'Match Provider' dropdown set to 'Splynx', a 'Splynx URL' text field containing 'https://splynx.sureswitch.co.uk', and 'Splynx API Key' and 'Splynx API Secret' password fields. A checkbox 'Use Splynx to send implications emails' is checked. A green 'Test' button is at the bottom right of the form.

Switching Events

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



The screenshot shows the 'Switching Events' page. The sidebar is identical to the previous screenshot. The main content area has a top bar with a user icon and 'April May'. The 'Switching Events' section includes an 'Event Publisher' dropdown set to 'Webhook', a 'Webhook URL' text field containing 'https://127.0.0.1:8080/event', and 'Webhook User' and 'Webhook Password' password fields. A 'Test' button is at the bottom right of the form. Below this is a 'Switching API Keys' section with a 'Create New' button. At the bottom right of the page are 'Cancel' and 'Save' buttons.

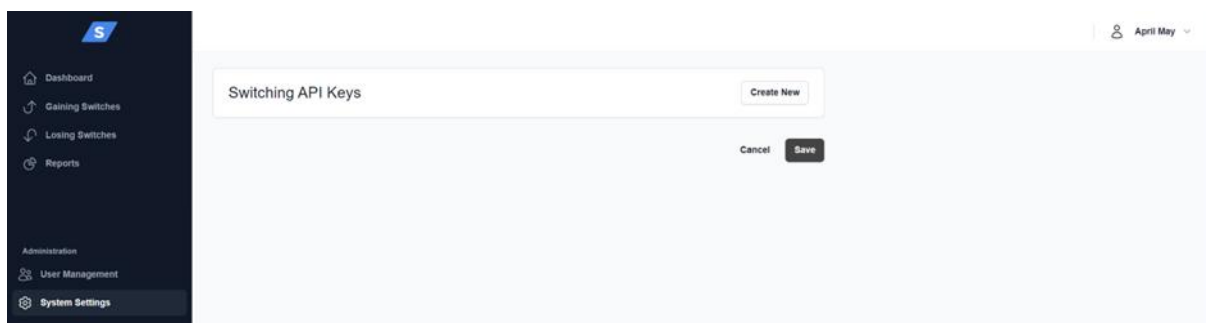
The Switching Events section shows the Event Publisher, webhook url, user and password for connecting the SureSwitch Switching Engine to your Customer BSS.

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. The Test button is rate limited to prevent excessive attempts to connect to your webhook. 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 form for creating a new API Key. It features a label 'API Key Name *' above a text input field containing the value 'TippyTelecomms'. At the bottom right of the form are two buttons: 'Cancel' and 'Add Key'.

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

878257725472403fbd8225946fdd95c4




API Secret

749136af7b6e4918a20158da78730d1f2f810fa3163d4086a366249775877ef4




URL Base Path

http://ots.co.uk



Close

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



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Switching API Keys

Create New

Name

Secret

TippyTelecomms
Key: 817c14779e3a4a09a13a6ed73aa6612



Cancel

Save

HMAC Key

HMAC (Hash-based Message Authentication Code) verification can be added to verify that messages are created by a known sender and has not been altered during transmission To create an HMAC (Hash-based Message Authentication Code) key click the Create New button. The HMAC key is created and stored. Please note that the key can only be viewed here, now and will not be accessible again. In the event you lose the HMAC key or it is no longer needed it can be deleted by selecting Delete. There can only be on HMAC key at any one time.

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HMAC Key Created

Copy and store the HMAC key in a secure location.

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

HMAC Key

29902bef-5094-4919-b132-855ae7035299



Close