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.

Table of Contents

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
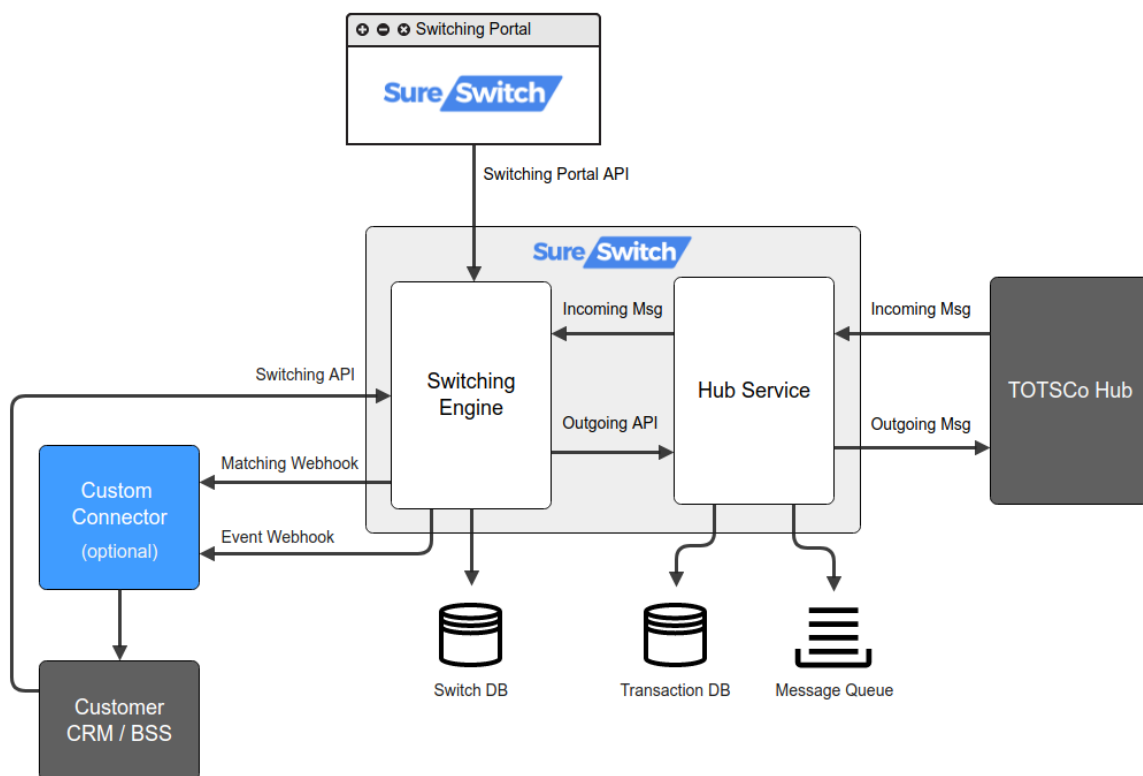
Account Registration

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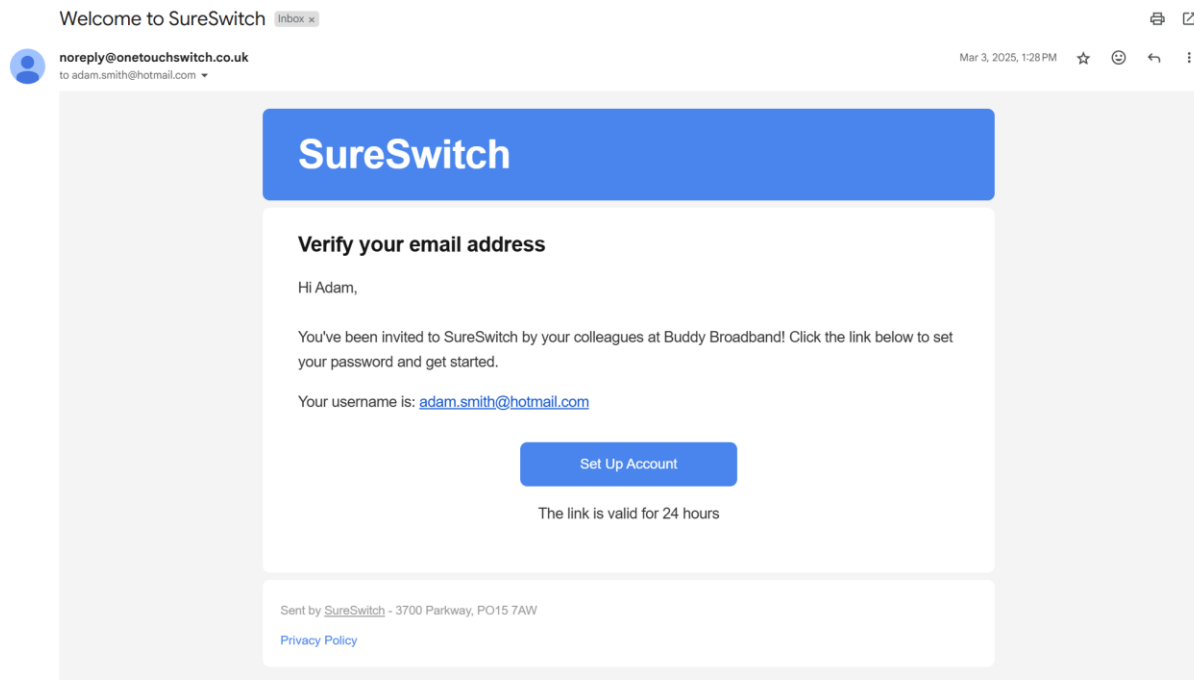
On receipt of the Welcome email, clicking Set Up Account will navigate to the Register User screen, where you can create, confirm, and set your password. From here your user account is complete and you will be navigated to the SureSwitch Portal Dashboard.

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.

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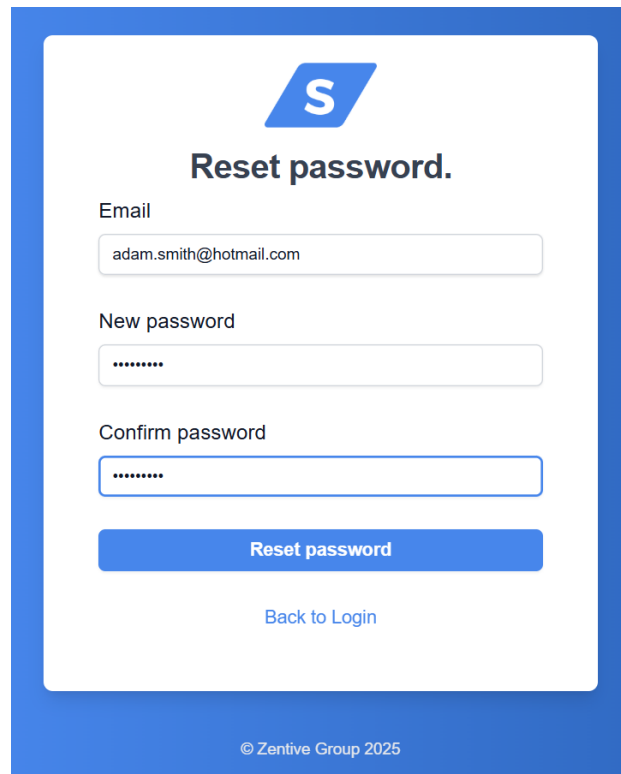
Clicking Reset Password navigates to the Reset Password screen where the email address, new password, and new password confirmation are entered.

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.
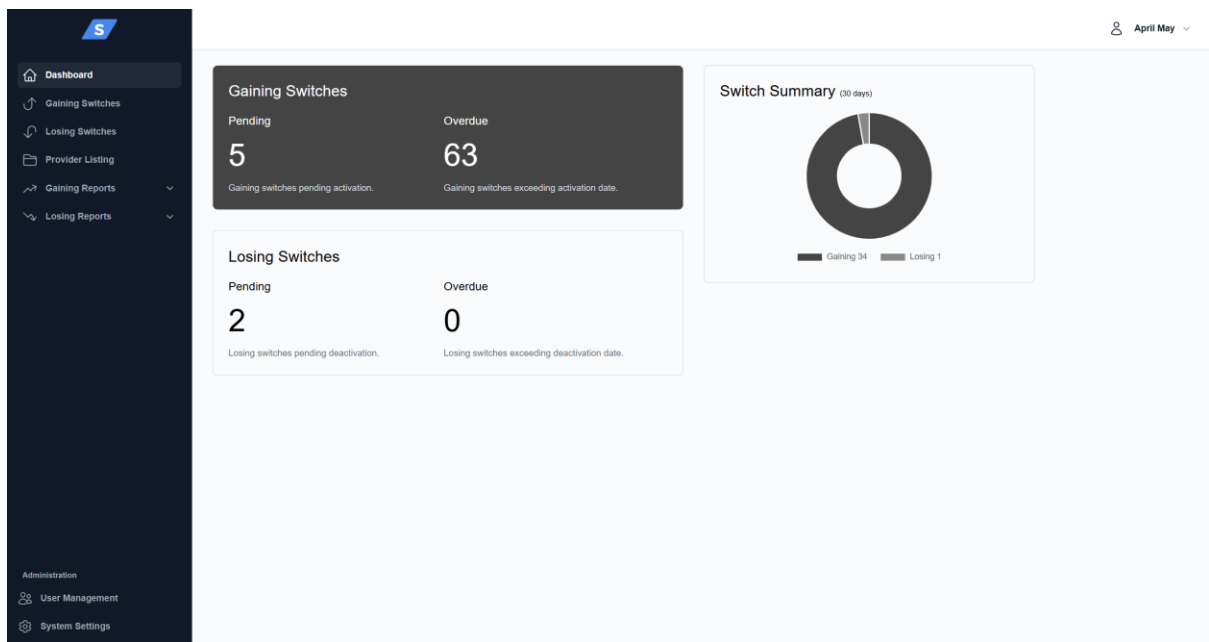
Gaining Switches

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.

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.

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.

New Gaining Switch

| 1 Matching | 2 Matched | 3 Ordered | 4 Activated |

Customer Details

Our reference

First name

Last name *
Brown

Address

Postcode / UPRN *
PO2 0JD   Search

Address *
83 STUBBINGTON AVENUE, PORTSMOUTH, PO2 0JD
Edit address

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   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 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.

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.

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.

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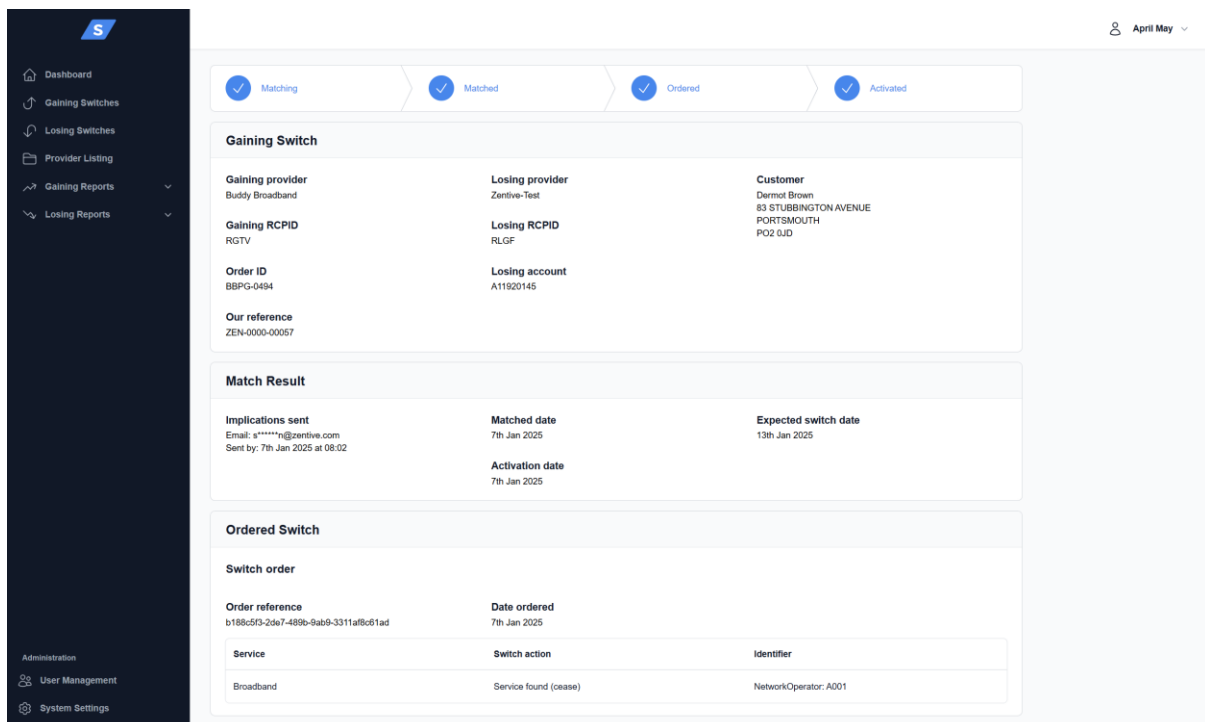
When a switch has been completed, a trigger order is sent to the losing provider instructing them to cease services and billing. When the trigger is ordered, the activation date is set confirming the date that the gaining provider completed the switch process.

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

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.

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.

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

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.

Selecting any losing switch displays more details.

Example of a triggered switch:

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

Provider Listing

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

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.

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.

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.

User Management

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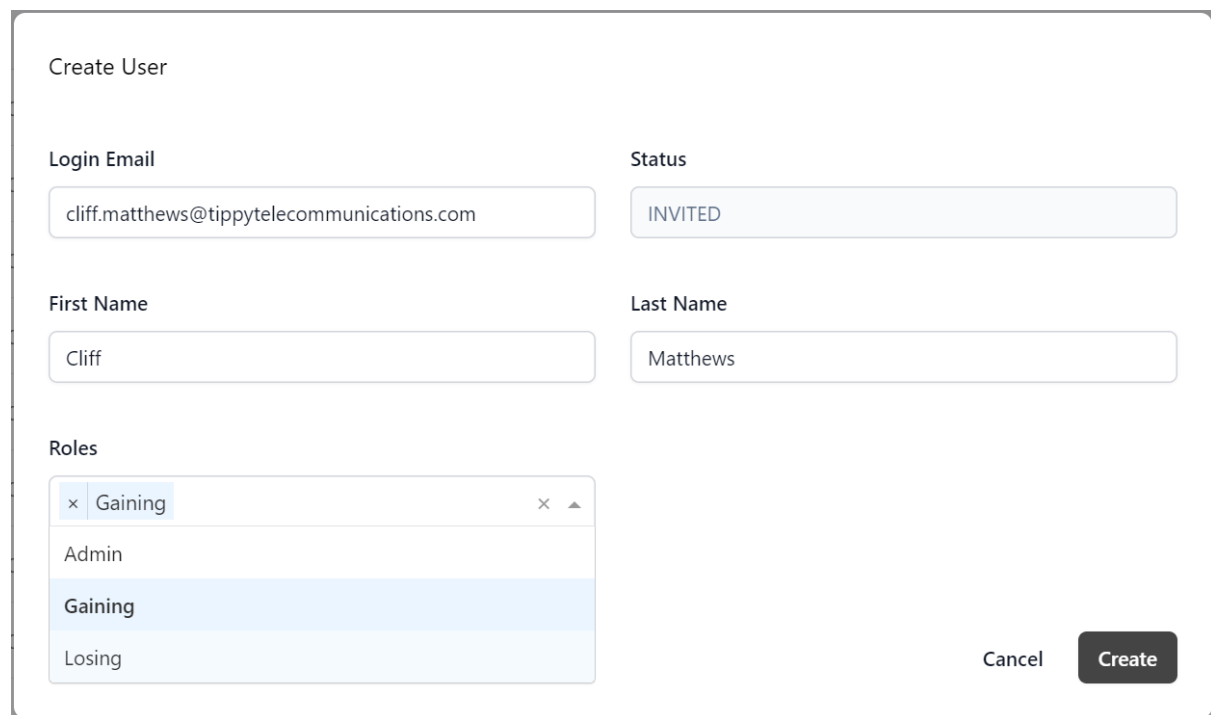
Create a User

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.

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.

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

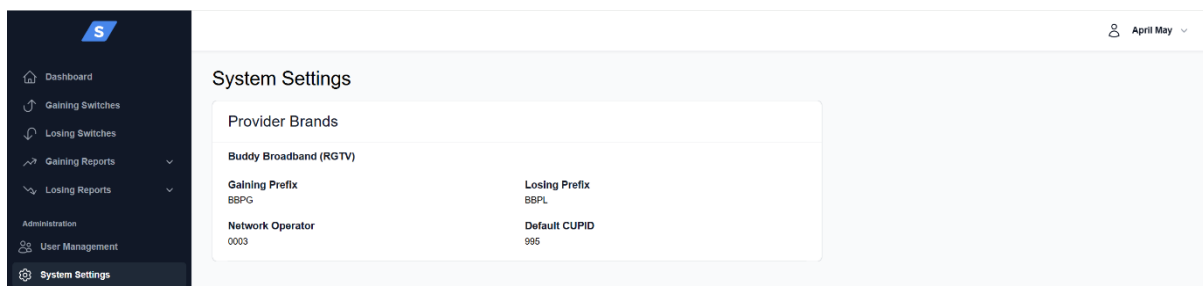This allows you to view losing switches.

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 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.
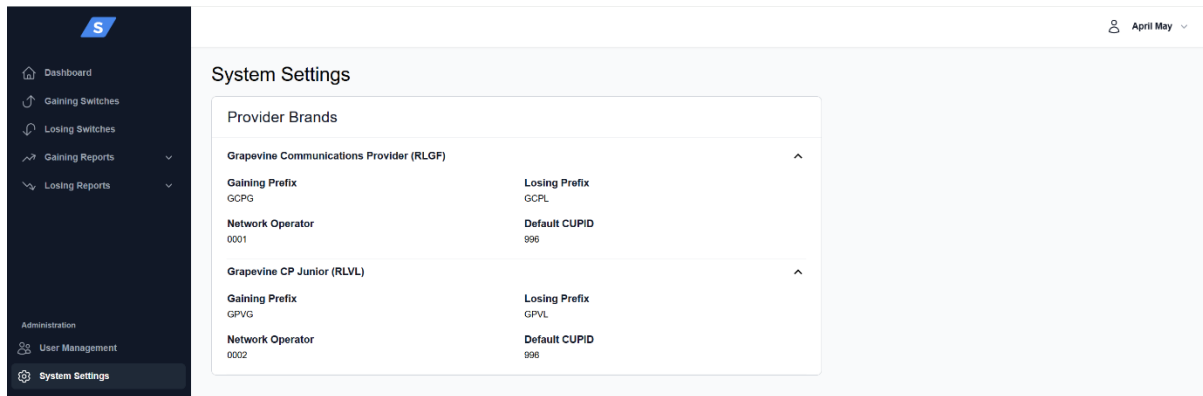
When the Match Provider in Customer Matching is selected as Splynx, it will be possible to customise the header and footer text that is included in the switching implications email and add bcc emails to receive copies of the implication emails being sent. The header and footer and bcc emails are specific to each account brand.
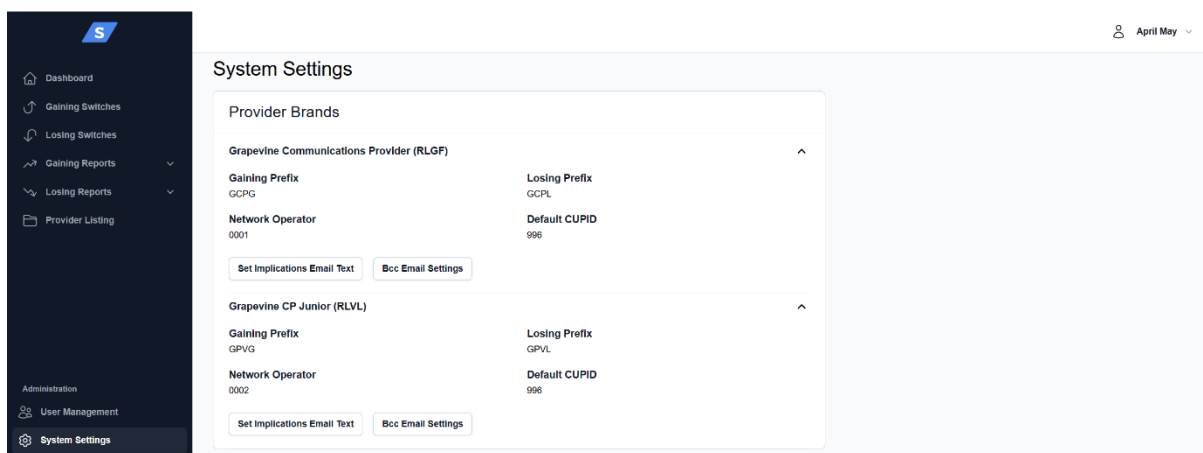
Set Implications Email Text

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.

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.
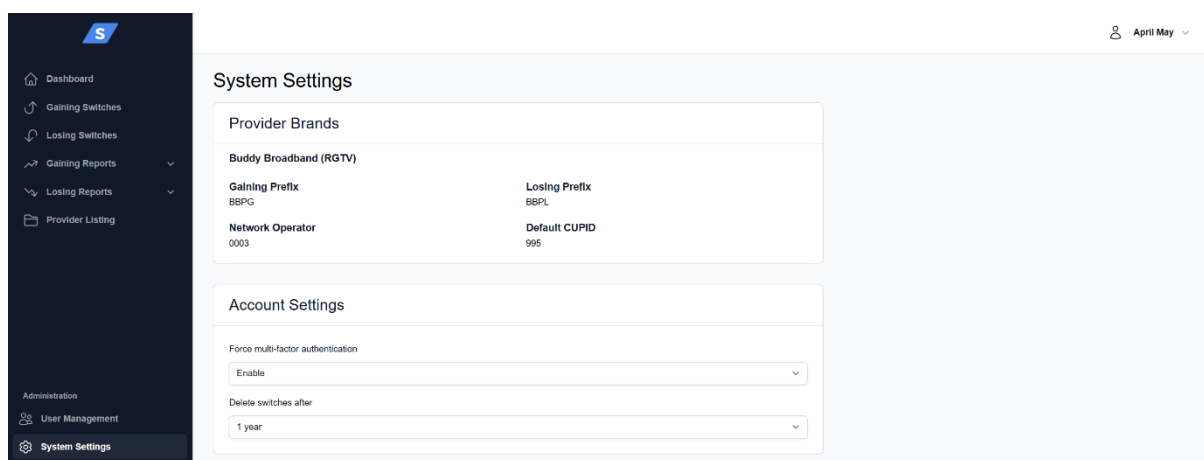
Account Settings

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.

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.

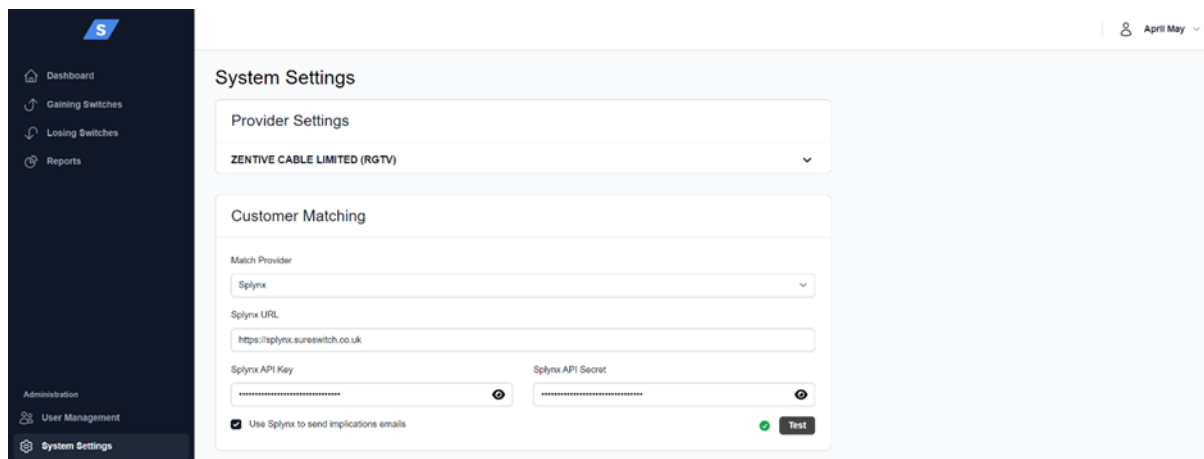# Customer Matching

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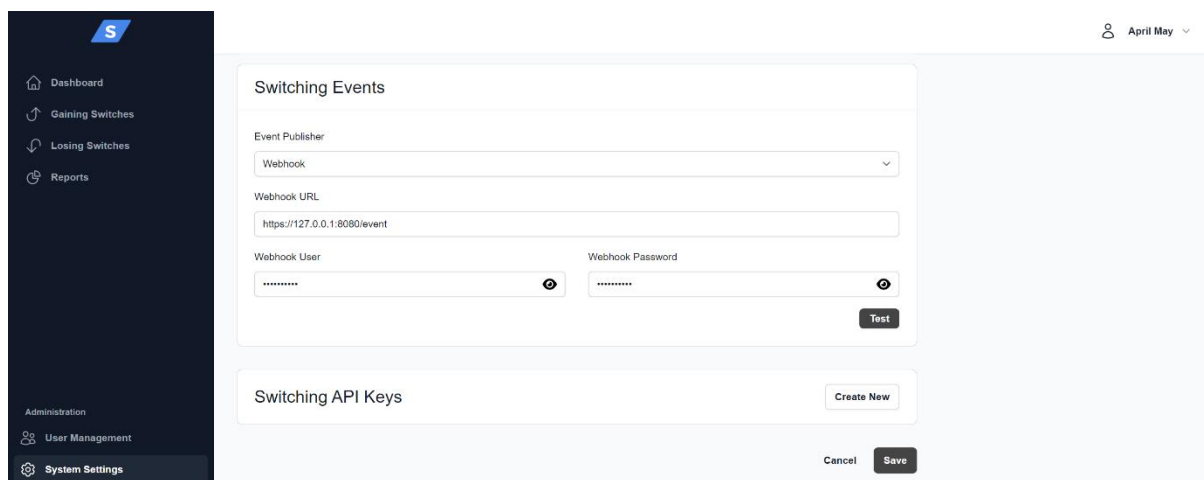
If Splynx is selected as the Match Provider you have the option to use Splynx to send the implications emails, if the checkbox is unselected, the emails will be sent from SureSwitch.

Switching Events

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

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.
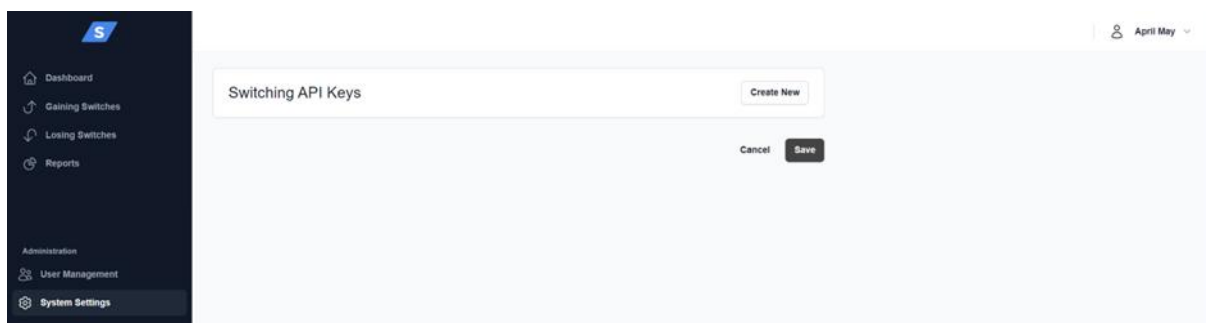
Enter a name for the key and click Add Key.

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.

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.

🔒

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