

Chess Partner Service Cloud Portal

What is the Chess Partner Service Cloud Portal?

The portal provides dealers with the tools they need to help manage their customer base more effectively by identifying re-sign opportunities.

What can I view on the portal?

Retention information
Commission information

How do I access the portal?

[Chess Partner Service Cloud Portal](#)

Where do I get my login details from?

To get registered for the portal, you will need to contact our retentions team by emailing retention@chesspartner.co.uk

Once I've got my login, what are the areas I can access?

You can access the 'Retention' and 'Commissions' section.

Logging In



LOG IN

Dealer Code/User Name:

Password:

Remember me next time.

Log In

[Forgot your password?](#)

If you do not have a log in, please contact your BDM.

Dealer code/Username

Password

Your username will be your 5-digit Chess code

If you don't remember your password, you can reset it by selecting 'Forgot your password', or email retention@chesspartner.co.uk



On the Homepage click on “**Retention**” to access your re-sign data:

Retention management tool:

- Provides live data for all your EE and O2 customers.
- Details customer name and contract start and end dates.
- Gives a view of current customers who are eligible for re-signing well ahead of time.

WELCOME

Welcome to Chess Partner Services Cloud Services.

Below you will see a list of tools available to you that will help to support your business on a daily basis.
Click on the relevant icon to access the tool.



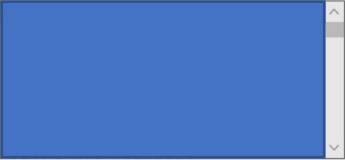
Once you are in the retention section, select your end user from the 'Multiple End User Selection' first. Then you can filter your data by End User, Contract Term, Contract term remaining or by Network.

Filter Results:

Contract Term:

Contract Term Remaining:

Network:

Multiple EndUser Selection: 

Click Generate Report and a table will appear with the results (see below example).

The top table is your **out of contract** data:

“Billing” shows the connections that are still billing with the network but you are not earning any revenue share on this so you would need to re-sign to start earning again

“Not Billing” shows the connections that are left on your base. These are customers you could diarise to revisit in the future.

The bottom table is your **in-contract** billing customers.

This data can be used for your pipeline in the current month or coming months.



chess. Customer Retention

Contract Status	Billing Status	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	
	BILLING	2017	1						1						2	
		2018						1				1	3	5	10	
		2019	5	7	6	7	15	1	3						44	
		2020			20	18										38
		BILLING Total														14
Out Of Contract	NOT BILLING	2016									2				2	
		2017	2		1	1							1		5	
		2018										13	7	16	36	
		2019	7	14	9	19	33	6			1	8		3	100	
		2020	7	3	5	5										20
NOT BILLING Total														143		
Total														257		
In Contract	BILLING	2020				20	20	27	5	13	2	5	9	3	104	
		2021	25	116	113	37	43	62	57	49	37	57	32	78	706	
		2022	154	156	133	140	127	158	33						901	
		BILLING Total														1711
Total														1711		



Click on any of the figures highlighted in blue to drill down into the data and view the customer details.

As an example, if you wanted to check all your connections coming out of contract in April, you would click on the highlighted figure above, under April 2020.

Contract Status	Billing Status	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
	BILLING	2017	1						1						2
		2018						1				1	3	5	10
		2019	5	7	6	7	15	1	3						44
		2020			20	18									38
		BILLING Total													
Out Of Contract	NOT BILLING	2016									2				2
		2017	2		1	1							1		5
		2018										13	7	16	36
		2019	7	14	9	19	33	6			1	8	3	100	
		2020	7	3	5	5									20
NOT BILLING Total														163	
Total														257	
In Contract	BILLING	2020				20	20	27	5	13	2	5	9	3	104
		2021	25	116	113	37	43	62	57	49	37	57	32	78	706
		2022	154	156	133	140	127	188	33						901
		BILLING Total													
Total														1711	

A table will appear below with the data you requested.

If you click on the disk icon highlighted, this will export the data into a CSV file.

You can also search for a mobile number or customer name using the "Find/Next" search bar.

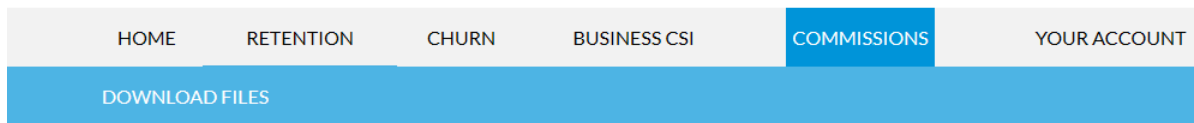
Connection Reference	Connection Number	Network	Activation Date	Contract Term	Commitment Date	End User

Commission Tab

The Commissions Tab is where you will find the following files:

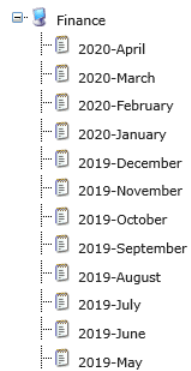
- Self Bills
- Clawbacks
- Revenue share
- End of Contract data
- CSI cleanse data

You can click on relevant 'File link' to download the data.



DOWNLOAD FILES

Filter by File Type:



File Description	File Type	Upload Date	File Link	FAQ
O2 End of Contract Data w/c 14/04/2020	Finance	14/04/2020 10:19:17	Download	N/A
O2 Proposed Disconnection Clawbacks Feb 2020	Finance	08/04/2020 13:22:50	Download	N/A
O2 End of Contract Data w/c 06/04/2020	Finance	06/04/2020 12:54:37	Download	N/A
Self Bill 2nd April 2020	Finance	03/04/2020 09:52:56	Download	N/A

