

## 1.1.1 Search, view, update and delete Agreements

---

### In this section

- Searching and viewing agreements
  - Updating an agreement
  - Deleting an agreement
- 

There are three types of agreement:

- Wholesale Contract agreement
- Interim Supply opt in agreement
- Gap site opt in agreement



*The **Wholesale contract** agreement is a bilateral contract between a Wholesaler and a Retailer to deliver Water or Sewerage services. A separate contract is needed per service category and is created by the Wholesaler.*

The registration of a new Supply Point requires the Wholesaler to have in place a Wholesale Contract agreement with the nominated Retailer. The Supply Point Registration process in the Central Market Operating System (CMOS) will validate that a Wholesale Contract agreement exists between the two Market Participants. A Wholesale contract (Ofwat legislation) must exist to enable the Retailer to opt in for interim duty supply allocation and for gap site allocation. It is the responsibility of your organisation to create and maintain these contracts for your wholesale area for both water and sewerage services.

### Searching and viewing agreements

You can search and view your agreements with Retailers using the **Search Agreements** function.

Navigate to the Search agreements screen as follows:

- 1 Select **Administration**
- 2 Select **Participant Management**
- 3 Select **Search Agreements**

You will be presented with the Search agreements screen with all existing agreements displayed in the search results, see the below example. If you have not created any agreements the search will return no results.

### Search agreements

-- Trading Party --    -- Agreement type --   

Trading Party	Agreement type	Status	Service	Effective From	Effective To
Wise Een Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-07 (UTC)	2017-03-31 (UTC)
Wise Een Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-07 (UTC)	2017-03-31 (UTC)
Angle Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-04 (UTC)	2017-03-31 (UTC)
Angle Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-04 (UTC)	2017-03-31 (UTC)
Dock Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-04 (UTC)	2017-03-31 (UTC)
Dock Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-04 (UTC)	2017-03-31 (UTC)

10 items per page    1 - 6 of 6 items    Version 2.0.3.8123

- 1 You can search for all your agreements in the CMOS. If you want to search for a specific agreement, populate the fields as follows:

Field name	Input type	Obligation	Description
Trading Party	Drop-down	Optional	Choose the Retailer with whom you have agreements with and for which you want to view your agreements.
Agreement type	Drop-down	Optional	Choose the agreement type for which you want to view your agreements.

- 2 Click on the **Clear** button to change the search criteria.
- 3 Click on the **Search** button to display all agreements concerning your organisation that meet the search criteria, see below example.

### Search agreements

Angle Tarn    Wholesale Contract   

Trading Party	Agreement type	Status	Service	Effective From	Effective To
Angle Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-04 (UTC)	2017-03-31 (UTC)
Angle Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-04 (UTC)	2017-03-31 (UTC)

10 items per page    1 - 2 of 2 items    Version 2.0.3.8123

- View an agreement by clicking the **Trading Party** (link). You will be presented with the View agreement screen, as shown in the example screen below.

### View agreement ✎ Edit   ✕ Cancel

<b>Agreement type</b>	Wholesale Contract
<b>Own Organisation</b>	Blea Water
<b>Trading Party</b>	Angle Tarn
<b>Service</b>	Water service category
<b>Status</b>	Active unrestricted Wholesale contract
<b>Effective From</b>	2016-07-04 (UTC)
<b>Effective To</b>	2017-03-31 (UTC)

Version 2.0.3.8123



Retired agreements remain available in the Search result and can be viewed. A retired agreement has an 'Effective To' date filled with a date in the past.

If you have rights to update agreements the **Edit** button is available.

- Click the **Cancel** button to return to the search screen.

### Updating an agreement

You can update an agreement from the View agreement screen (see the previous View agreement screen).

- Click the **Edit** button to open the Edit agreement screen (shown below) where you can update the agreement status and the 'Effective To' Date.

### Edit agreement

<b>Agreement type</b>	Wholesale Contract
<b>Own Organisation</b>	Blea Water
<b>Trading Party</b>	Angle Tarn
<b>Service</b>	Water service category (WATER) ▼
<b>Status</b>	Active unrestricted Wholesale contract (ACTIVE) ▼
<b>Effective From Date</b>	2016-07-04 (UTC)
<b>Effective To Date</b>	2017-03-31 <input type="text" value=""/>

✕ Cancel   ✎ Submit

Version 2.0.3.8123

2 To update the agreement populate the fields as follows

Field name	Input type	Obligation	Description
<b>Status</b>	Drop-down	Optional	Change the status to a restricted Wholesale contract agreement where no more supply points can be obtained within your wholesaler area (status NOMORESPID) or change the status back to an Active unrestricted Wholesale contract (ACTIVE).
<b>Effective To Date</b>	Date	Optional	Enter a date to limit the Wholesale contract agreement to a certain period.  If you want to directly retire the agreement, choose today's date as the Effective to Date.

- 3 Click the **Submit** button to update the agreement. You are returned to the View agreement screen with the changed data and a 'Your action was successful' message above it.
- 4 Click the **Cancel** button to return to the View agreement screen with no changes saved.

### 1.1.2 Creating an Agreement

As mentioned in section 1.1.1 there are three types of agreement. Creating and maintaining Wholesale Contract agreements is your responsibility. The Interim Supply opt in and Gap Site opt in agreements are created by the Retailer and maintained by the Market Operator.

You can create Wholesale Contact agreements using the **Create Agreement** screen.

Navigate to the Create agreement screen as follows:

- 1 Select **Administration**
- 2 Select **Participant Management**
- 3 Select **Create Agreement**

You will be presented with the Create agreement screen, as shown below.

As you can only create Wholesale Contracts the Agreement type, the Status and 'Effective From' Date are prefilled.

- 1 Populate the other fields as follows:

Field name	Input type	Obligation	Description
<b>Own Organisation</b>	Not editable	Mandatory	You can only create an agreement for your own organisation; this is prefilled and cannot be changed.
<b>Trading Party</b>	Drop-down	Mandatory	Select a Retailer from the list
<b>Service</b>	Drop-down	Mandatory	Choose Water or Sewerage services

Field name	Input type	Obligation	Description
Status	Not editable	Mandatory	The status is prefilled and not editable.  For Wholesale contracts, the status will be active unrestricted (ACTIVE).
Effective From Date	Date	Mandatory	Select the date from when the Wholesale Contract should start.  If you want a future Wholesale contract, you can enter a date after today's date.
Effective To Date	Date	Optional	Leave this blank, or enter a date if you want to restrict the agreement to a certain period.

- Click **Cancel** button to cancel the creation of the agreement. You are returned to the Search agreements screen.
- Click **Submit** button to create the agreement.  
You will be presented with the Search agreements screen with a 'Your action is successful' message above it, see example screen below.

Successfully created the agreement. ✕

## Search agreements

-- Trading Party --
-- Agreement type --

Trading Party	Agreement type	Status	Service	Effective From	Effective To
Blelham Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-18 (UTC)	
Wise Een Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-07 (UTC)	2017-03-31 (UTC)
Wise Een Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-07 (UTC)	2017-03-31 (UTC)
Angle Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-04 (UTC)	2017-03-31 (UTC)
Angle Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-04 (UTC)	2017-03-31 (UTC)
Dock Tarn	Wholesale Contract	ACTIVE	SEWERAGE	2016-07-04 (UTC)	2017-03-31 (UTC)
Dock Tarn	Wholesale Contract	ACTIVE	WATER	2016-07-04 (UTC)	2017-03-31 (UTC)

⏪ ⏩ 1 ⏪ ⏩

10 items per page

1 - 7 of 7 items

Version 2.0.3.8123



You can have one current/ongoing Wholesale contract agreement with a Retailer for a service category. If you want a Wholesale contract with a Retailer for both services, you have to create two Wholesale contract agreements, one for water services and one for sewerage services.