

# **Oracle Utilities Customer Care and Billing**

Release 2.3.1

Utility Reference Model

3.4.1.1 Manage Customer Contacts

July 2012

Oracle Utilities Customer Care and Billing Utility Reference Model 3.4.1.1, Release 2.3.1

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# Chapter 1

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## Overview

This chapter provides a brief description of the Manage Customer Contacts business process and associated process diagrams. This includes:

- **Brief Description**
  - **Actors/Roles**

## Brief Description

**Business Process:** 3.4.1.1 Manage Customer Contacts

**Process Type:** Process

**Parent Process:** 3.4.1 Manage Contacts

**Sibling Processes:**

Customer contacts are used to record when customers contact a company and why. This process also represents typical activity Company has when decides communicate to Customer (e.g. send letters, make manual or automated phone calls). This process provides information how customer contacts are created and utilized in the system.

## Actors/Roles

The Manage Customer Contacts business process involves the following actors and roles.

- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

# Chapter 2

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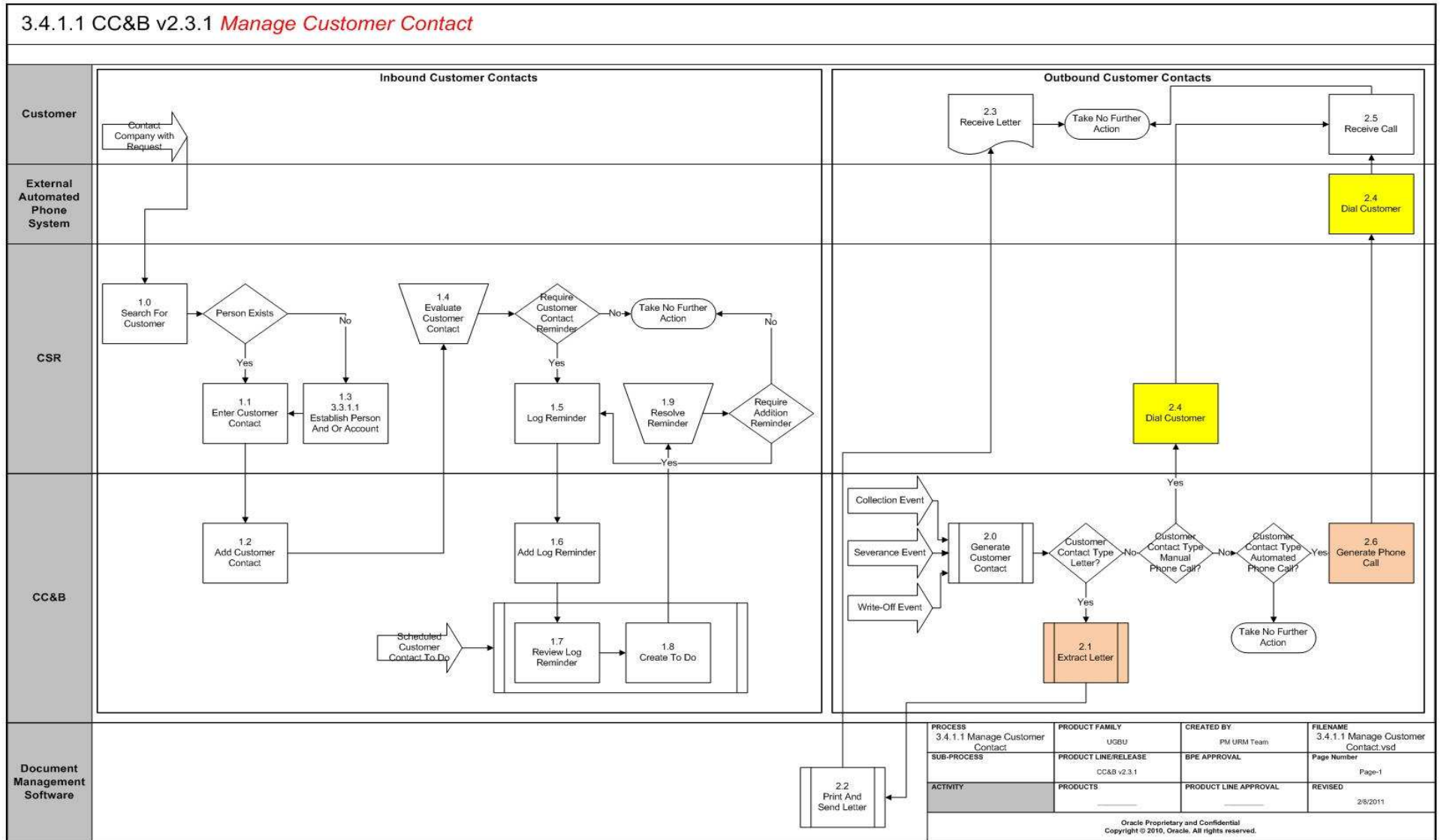
## Detailed Business Process Model Description

This chapter provides a detailed description of the Manage Customer Contacts business process. This includes:

- **Business Process Diagrams**
  - **Manage Customer Contacts**
- **Manage Customer Contacts Description**
- **Installation Options Control: Central Alert Algorithms**
- **Related Training**

# Business Process Diagrams

## Manage Customer Contacts





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# Manage Customer Contacts Description

This section includes detailed descriptions of the steps involved in the “xxx” business process, including:

- 1.0 Search for Customer
- 1.1 Enter Customer Contact
- 1.2 Add Customer Contact
- 1.3 3.3.1.1 Establish Person and or Account
- 1.4 Evaluate Customer Contact
- 1.5 Log Reminder
- 1.6 Add Log Reminder
- 1.7 Review Log Reminder
- 1.8 Create To Do
- 1.9 Resolve Reminder
- 2.0 Generate Customer Contact
- 2.1 Extract Letters
- 2.2 Print and Send Letter
- 2.3 Receive Letter
- 2.4 Make a Phone Call
- 2.5 Receive Call
- 2.6 Request Phone Call
- 2.7 Dial Customer

## 1.0 Search for Customer

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** When a customer contacts the company, the CSR or Authorized User searches for an existing customer.

## 1.1 Enter Customer Contact

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If a person exists the CSR or Authorized User will enter customer contact information to maintain records on Customer Contact Page.

## 1.2 Add Customer Contact

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The system adds and store customer contact information.

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**Entities to Configure**


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Customer Contact Class  
Customer Contact Type  
Installation Options-Framework  
Zone

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**Business Objects**


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**Available Algorithms**


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CI\_CustomerContact (Customer Contact)

**Installation Options Control: Central Alert Algorithms**

CI\_TL-CUSTCO - Customer Contact Timeline

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### 1.3 3.3.1.1 Establish Person and or Account

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If a person does not exist the process to add a person is provided in 3.3.1.1 Establish Person and or Account.

### 1.4 Evaluate Customer Contact

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User reviews customer contact records.

### 1.5 Log Reminder

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If a reminder is needed to follow-up on a customer issue the CSR or Authorized User can log a reminder on the Customer Contact Log Entry Page.

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**Entities to Configure**


---

To Do Role  
To Do Type

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### Available Algorithms

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CI\_TDT-INFO - To Do Information (Skill Information)

CI\_VAL-SKILL - Validate User Assignment - Issue Warning

---

## 1.6 Add Log Reminder

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The system adds and store log reminders.

## 1.7 Review Log Reminder

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The system reviews customer contact reminders.

## 1.8 Create To Do

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** A background batch process creates a To Do entry for customer contacts that have been flagged to generate a future date To Do.

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### Entities to Configure

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To Do Role

To Do Type

Feature Configuration

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### Available Algorithms

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CI\_TD-CCCB - Create Pending To Do for Customer Contact Job

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### Configurable Processes

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TD-CCCB - To Do for Customer Contact

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## 1.9 Resolve Reminder

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** CSR or Authorized User resolves logged reminders.

## 2.0 Generate Customer Contact

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** System events can trigger the creation of a customer contact.

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### Entities to Configure

---

Meter Reader Remark

Campaign

Customer Class

Service Credit Membership Type

Customer Contact Class

Customer Contact Type

SA Type

Case Type

Field Activity Remark

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### Business Objects

### Available Algorithms

C1-ExpireCreditCardCustContact  
(Customer Contact - Auto Pay Credit Cards  
Expiration Notice)

CI\_CustomerContact (Customer Contact)

MRRCRESVCCC - Create Service  
Customer Contact

CAOC-CCORDER - Create a CC/  
ORDER customer contact

CREATE CC - Create customer contact  
when order is completed

SCMA-CC - Create Cust Cont for FF  
Membership Activation

SCMC-SENDLTR - Send letter when SC  
membership created

SAAT-NB - Non-billed Budget SA  
Activation

CI\_UARENEW - Create an Umbrella  
Agreement Renewal

FARSPTOCUS - FA Remark - Spoke to  
Customer

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## 2.1 Extract Letters

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** Background batch process calls up each customer contact letter template. Information from letter templates is extracted to letters.

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### Entities to Configure

---

Collection Event Type

Severance Event Type

Workflow Event Type

Write Off Event Type

Letter Template

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### Available Algorithms

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CI\_LTREX\_RPT - Create a letter using a reporting engine

LTEX\_COL - Create collection event letter extract records

LTEX-GEN - Create generic letter extract records

LTEX-SEV - Create severance event letter extract records

LTEX-WF - Create workflow event letter extract records

LTEX-WO - Create write-off event letter extract records

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### Configurable Processes

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LTRPRT - Letter Extract

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## 2.2 Print and Send Letter

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** Letters are automatically passed to print software as an alternate print/routing method.

## 2.3 Receive Letter

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** Customer

**Description:** Customer receives generated letter.

## 2.4 Make a Phone Call

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If a phone call is required the CSR or Authorized User will make a phone call to customer.

## 2.5 Receive Call

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** Customer

**Description:** The customer receives a call from the company.

## 2.6 Request Phone Call

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** If an automated phone call is required the customer phone number is automatically processed through the system.

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### Entities to Configure

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ActiveX - CDxCTI

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### Configurable Processes

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Automated Dialer Software

Automated Dialer User Interface

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## 2.7 Dial Customer

See **Manage Customer Contacts** on page 2-2 for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The customer phone number is automatically dialed.

## Installation Options Control: Central Alert Algorithms

PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts
CCAL WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
CCAL WFACCTR	Display active WF for account based on char
CCAL WFPREMR	Display active WF for premise based on char
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
C1_CRRT-DF	Credit Rating Alert
C1_LSSL-DF	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	Highlight Life Support/Sensitive Load on Premise
C1_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request

## Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks