Oracle Utilities Customer Care and Billing

Release 2.3.1

Utility Reference Model

3.4.1.1 Manage Customer Contacts

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

Contents

Chapter 1

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

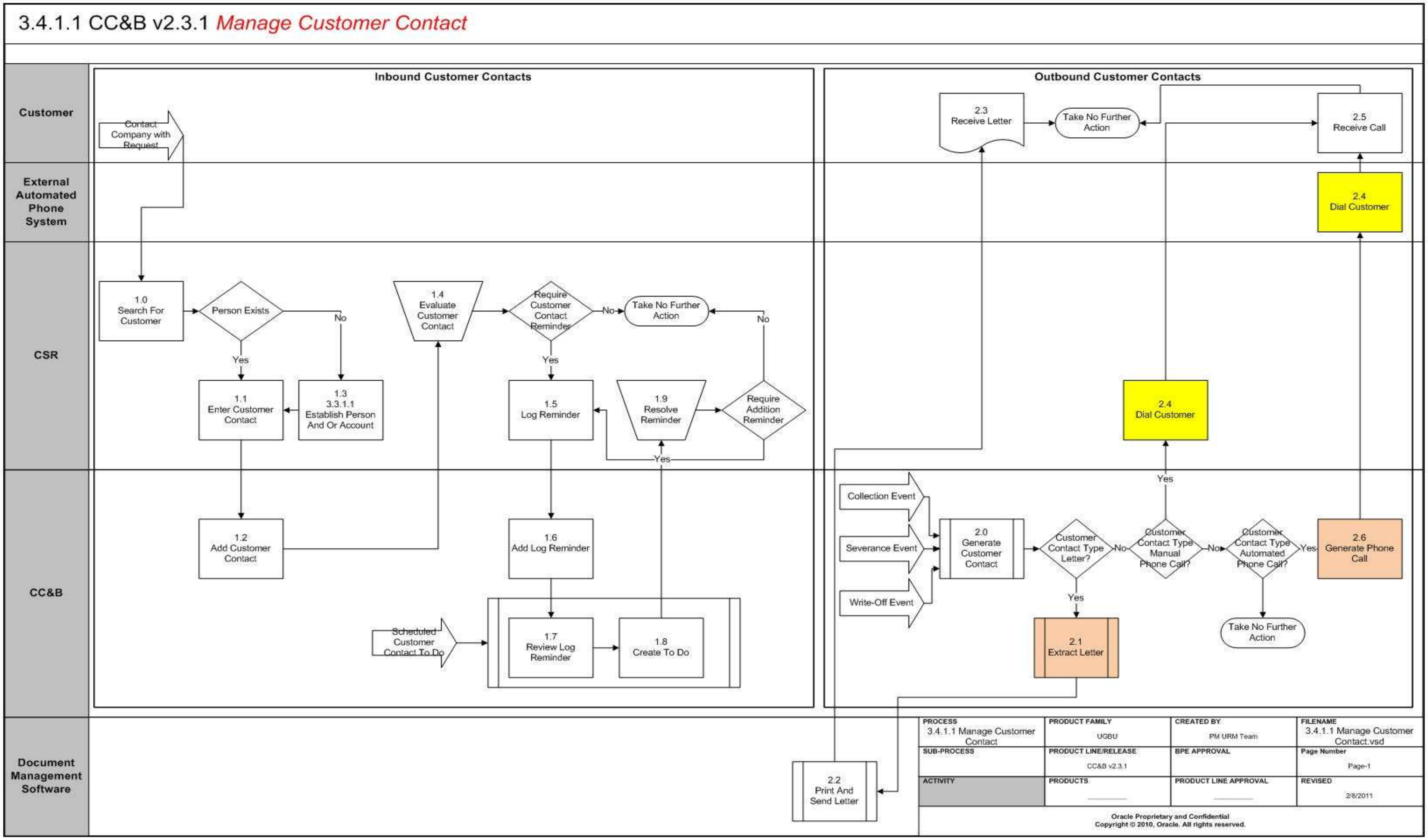
Detailed Business Process Model Description

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



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.

Entities to Configure
Customer Contact Class
Customer Contact Type
Installation Options-Framework
Zone

Business Objects	Available Algorithms
CI_CustomerContact (Customer Contact)	**Installation Options Control: Central Alert Algorithms** CI_TL-CUSTCO - Customer Contact Timeline

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.

Entities to Configure
To Do Role
To Do Type

Available Algorithms
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.

Entities to Configure
To Do Role
To Do Type
Feature Configuration

Available Algorithms
CI_TD-CCCB - Create Pending To Do for Customer Contact Job

Configurable Processes
TD-CCCB - To Do for Customer Contact

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.

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

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

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.

Entities to Configure
Collection Event Type
Severance Event Type
Workflow Event Type
Write Off Event Type
Letter Template

Available Algorithms
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

Configurable Processes
LTRPRT - Letter Extract

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.

Entities to Configure
ActiveX - CDxCTI

Configurable Processes
Automated Dialer Software
Automated Dialer User Interface

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