

**Oracle Utilities Customer Care & Billing  
Release 2.4.0**

Utility Reference Model

3.4.1.1 Manage Customer Contacts

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## 3.4.1.1 Manage Customer Contacts

This section provides a description of the “Manage Customer Contacts” business process. This includes:

- ♦ [Brief Description](#)
  - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Manage Customer Contacts Process Model - Page 1](#)
- ♦ [Manage Customer Contacts Detailed Process Model Description](#)
- ♦ [Customer Contact Methods](#)
- ♦ [Installation Options - Control Central Alert Algorithms](#)
- ♦ [Related Training](#)

## Brief Description

**Business Process:** 3.4.1.1 CC&B.Manage Customer Contacts

**Process Type:** Process

**Parent Process:** 3.4.1CC&B. Manage Contacts

**Sibling Processes:** n/a

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.

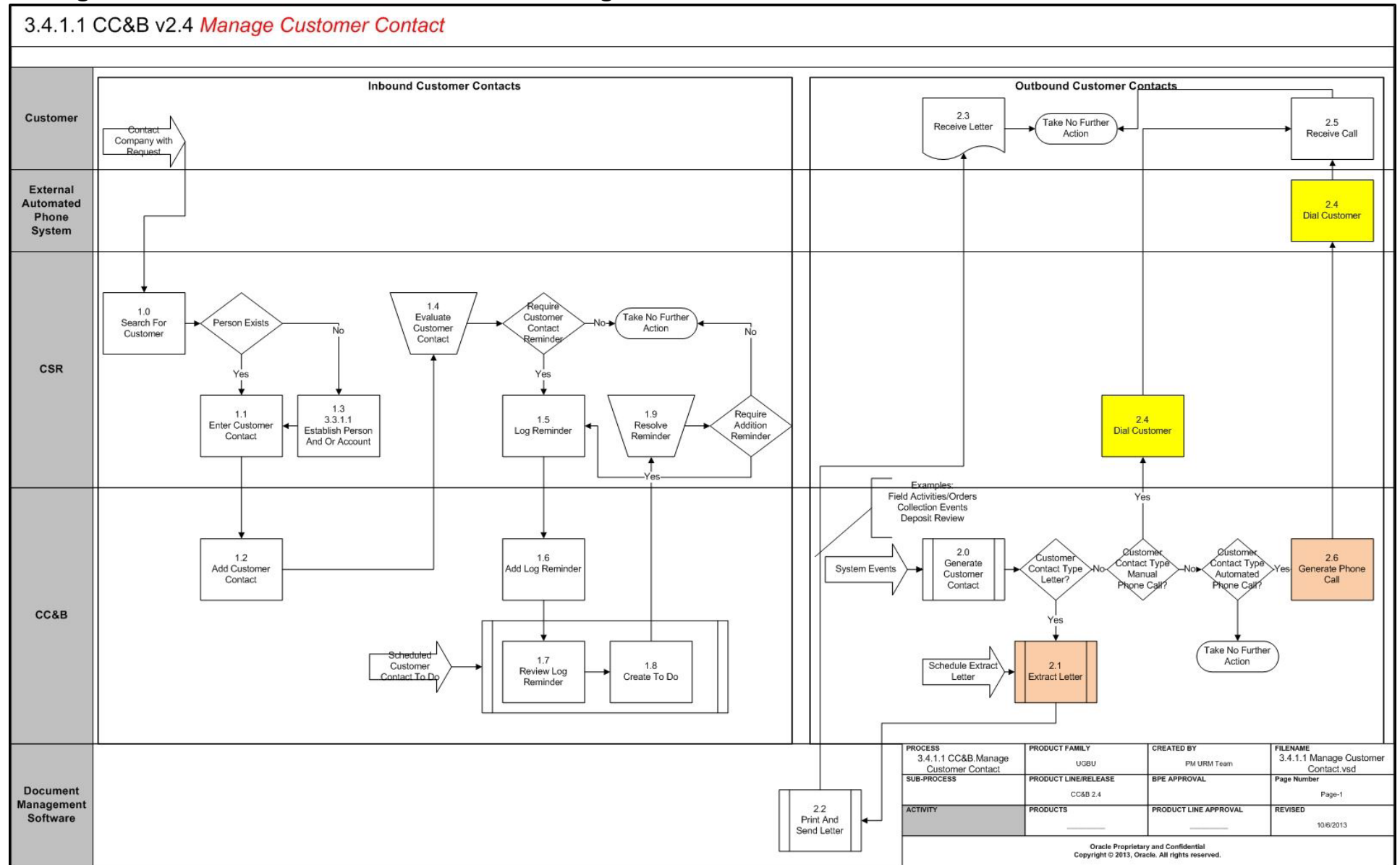
## Actors/Roles

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.

# Business Process Diagrams

## Manage Customer Contacts Process Model - Page 1



# Manage Customer Contacts Detailed Process Model Description

This section provides a detailed description of the “Manage Customer Contacts” 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
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- ♦ 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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

**Note:** The process uses the Processing Script to initiate the creation of the Customer Contact using the Business Object. It then calls the Algorithms as needed to verify the information entered.

### Process Names

- C1-CreCustCn - Create Customer Contact (Plug-in Script)

### Entities to Configure

- Customer Contact Class
- Customer Contact Type
- Installation Options-Framework
- Zone

### Business Objects

- CI\_CustomerContact (Customer Contact)

### Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)
- CI\_TL-CUSTCO - Customer Contact Timeline
- CI\_CHKCCMREC - Check Customer Contact Manager Records
- C1-CREATECC - Create Customer Contact

## 1.3 3.3.1.1 Establish Person and/or Account

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

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

## 1.5 Log Reminder

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

## 1.7 Review Log Reminder

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

## 1.8 Create To Do

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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.

### Process Names

- TD-CCCB - To Do for Customer Contact

### Entities to Configure

- To Do Role
- To Do Type
- Feature Configuration

**Available Algorithms**

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

**1.9 Resolve Reminder**

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

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

**2.0 Generate Customer Contact**

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

**Note:** The following base system events will use the Algorithms, Business Objects and Scripts to create the Customer Contact during each systems normal processing. Customer Contacts can be turned off if not needed. They may also be added to any processes by using parameters.

- Orders
- Membership Activation
- Non Billed Budget Service Agreement Activation
- Umbrella Agreement Renewal
- Field Activity Remarks
- Collection Events
- Severance Events
- Write Offs

**Process Names**

- C1-CreCustCn - Create Customer Contact (Plugin Script)
- C1-CreateCC - Create Customer Contact Task (Service Script)
- CI\_CardDeny- Create Customer Contact when CC authorization is denied for certain reasons (Service Script)
- CI\_DepRvwCC- Deposit Review - Create Customer Contact (BPA Script)

**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**

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

- C1-FWCustomerContact - Field Work Customer Contact
- CI\_ClaimPersonContactDetails - Person - Get Contact Details For Rebate Claim

**Available Algorithms**

- 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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

**Process Names**

- LTRPRT - Letter Extract

**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

## 2.2 Print and Send Letter

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

## 2.3 Receive Letter

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** Customer

**Description:** Customer receives generated letter.

## 2.4 Make a Phone Call

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**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

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** Customer

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

## 2.6 Request Phone Call

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

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

### Process Names

- Automated Dialer Software
- Automated Dialer User Interface

### Entities to Configure

- ActiveX - CDxCTI

## 2.7 Dial Customer

**Reference:** [Manage Customer Contacts Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

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

## Customer Contact Methods

The following customer contact methods are available:

Initial Options	Description
EM	EMAIL
FAX	Fax
N/A	Not Applicable
PH	Phone
POST	Postal
SMS	SMS

## Installation Options - Control Central Alert Algorithms

The following installation options are available:

Value	Description
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

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## 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
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data