

Oracle Utilities Customer Care & Billing Release 2.4.0

Utility Reference Model

3.4.2.1 CC&B Maintain Customer Profile

December 2015

Oracle Utilities Customer Care & Billing Utility Reference Model 3.4.2.1 CC&B Maintain Customer Profile, Release 2.4.0

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3.4.2.1 Maintain Customer Profile

This section provides a description of the “Maintain Customer Profile” business process. This includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Maintain Customer Profile Process Model - Page 1](#)
 - ♦ [Maintain Customer Profile Process Model - Page 2](#)
 - ♦ [Maintain Customer Profile Process Model - Page 3](#)
- ♦ [Maintain Customer Profile Detailed Process Model Description](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 3.4.2.1 CC&B Maintain Customer Profile

Process Type: Sub-Process

Parent Process: 3.4.3 CC&B Provide Customer Service

Sibling Processes: n/a

This process describes typical scenarios how system allows Company to store and update customer profiles.

Actors/Roles

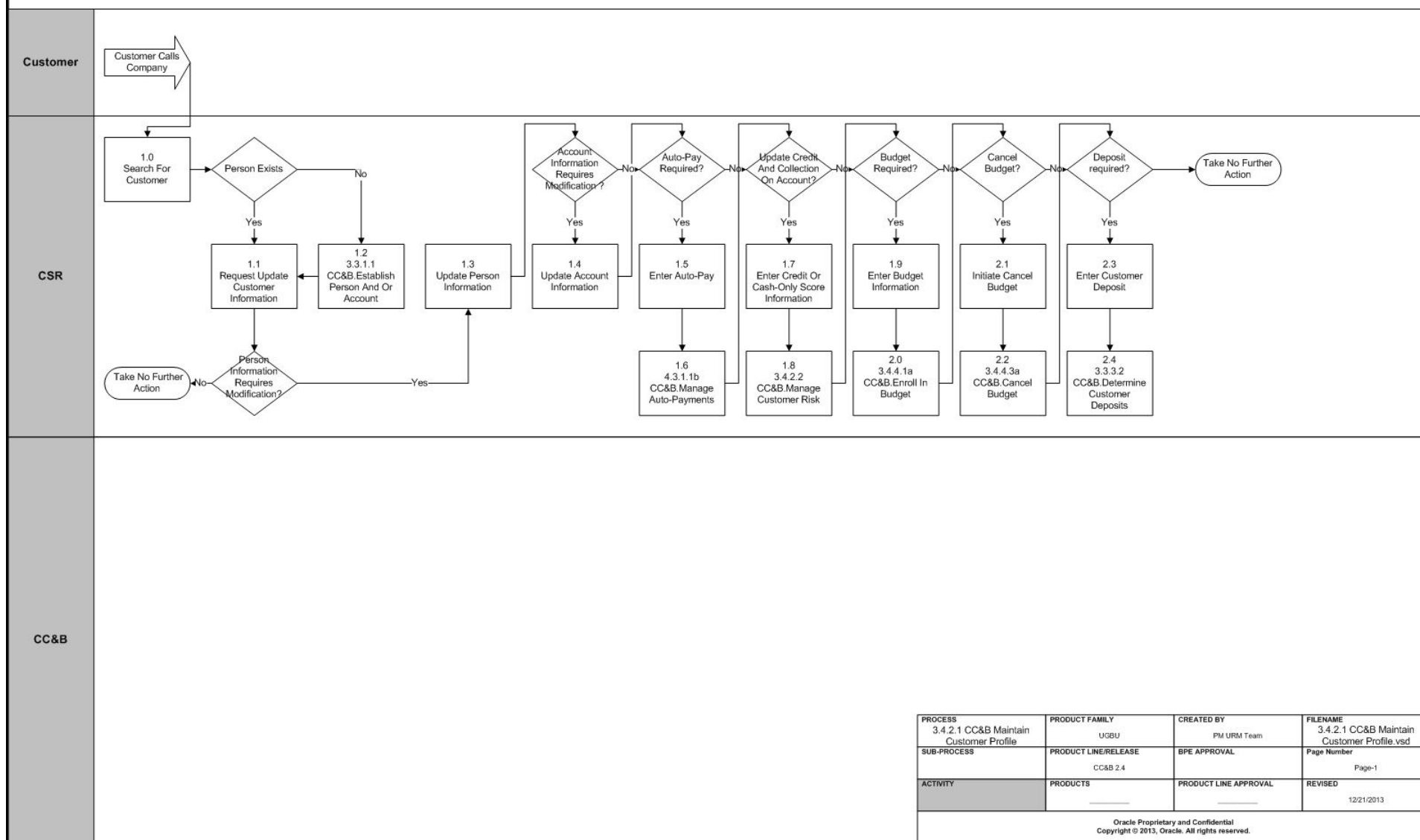
The Maintain Customer Profile business process involves the following actors and roles.

- **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

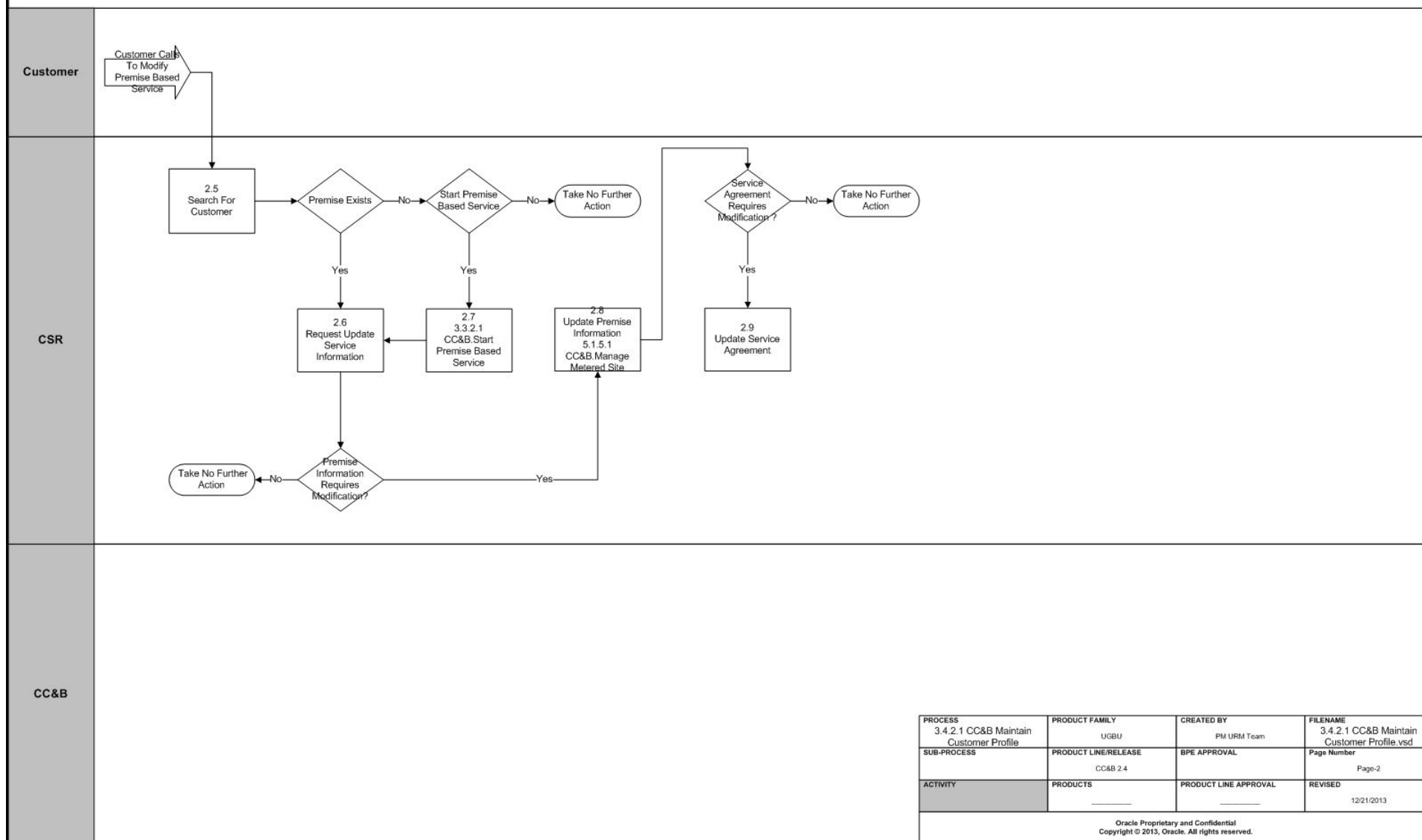
Maintain Customer Profile Process Model - Page 1

3.4.2.1 CC&B V2.4 *Maintain Customer Profile*



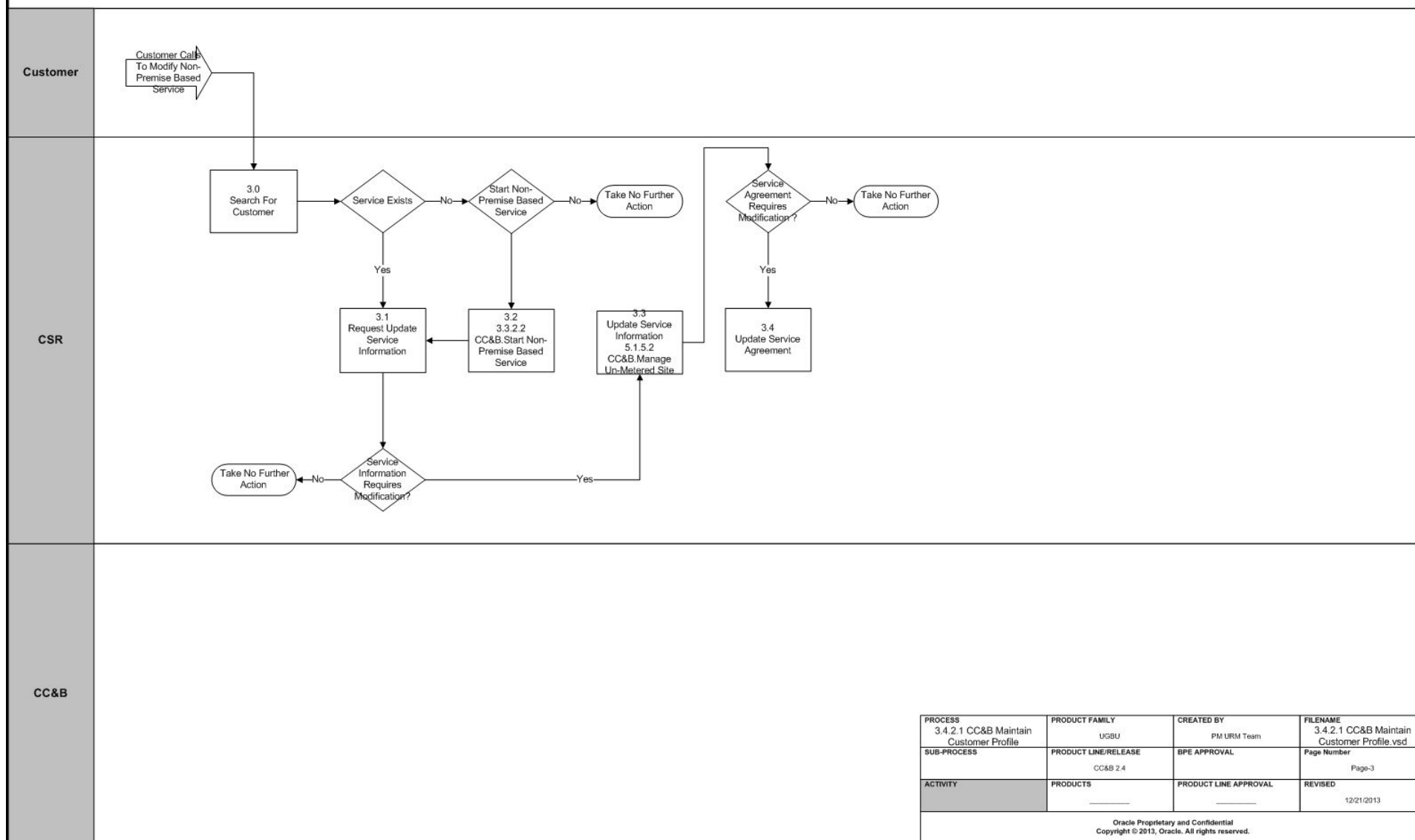
Maintain Customer Profile Process Model - Page 2

3.4.2.1 CC&B V2.4 *Maintain Customer Profile*



Maintain Customer Profile Process Model - Page 3

3.4.2.1 CC&B V2.4 *Maintain Customer Profile*



Maintain Customer Profile Detailed Process Model Description

This section provides a detailed description of the “Maintain Customer Profile” business process, including:

- ♦ 1.0 Search For Customer
- ♦ 1.1 Request Update Customer Information
- ♦ 1.2 3.3.1.1 Establish Person and/or Account
- ♦ 1.3 Update Person Information
- ♦ 1.4 Update Account Information
- ♦ 1.5 Enter Auto-Payment
- ♦ 1.6 4.3.1.1b Manage Auto-Payment
- ♦ 1.7 Enter Credit Or Cash-Only Score Information
- ♦ 1.8 3.4.2.2 Manage Customer Risk
- ♦ 1.9 Enter Budget Information
- ♦ 2.0 3.4.4.1a Enroll in Budget
- ♦ 2.1 Initiate Cancel Budget
- ♦ 2.2 3.4.4.3a Cancel Budget
- ♦ 2.3 Enter Customer Deposit
- ♦ 2.4 3.3.3.2 Determine Customer Deposit, (Cash, Non-Cash, 3rd Party)
- ♦ 2.5 Search For Customer
- ♦ 2.6 Request Update Service Information
- ♦ 2.7 3.3.2.1 Start Premise Based Service
- ♦ 2.8 Update Premise Information 5.1.5.1 Manage Metered Site
- ♦ 2.9 Update Service Agreement
- ♦ 3.0 Search For Customer
- ♦ 3.1 Request Update Service Information
- ♦ 3.2 3.3.2.1 Start Non-Premise Based Service
- ♦ 3.3 Update Service Information
- ♦ 3.4 Update Service Agreement

1.0 Search For Customer

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

Actor/Role: CSR

Description: As a result of a customer request, the first step is to determine if a person exist or create new person. The CSR is responsible for fulfilling customer requests.

1.1 Request Update Customer Information

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

Actor/Role: CSR

Description: CSR or Authorized User is responsible for updating customer information.

1.2 3.3.1.1 Establish Person and/or Account

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

Actor/Role: CSR

Description: CSR or Authorized User creates person and/or account. Refer to 3.3.1.1 Establish Person and/or Account.

1.3 Update Person Information

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

Actor/Role: CSR

Description: CSR or Authorized User updates all person information that is required.

1.4 Update Account Information

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

Actor/Role: CSR

Description: CSR or Authorized User updates required account information. Refer to 3.3.1.1 Establish Person and/or Account.

1.5 Enter Auto-Payment

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

Actor/Role: CSR

Description: If customer requires automatic payment on account enter auto-pay information. Refer to 4.3.1.1b Manage Auto-Payments

1.6 4.3.1.1b Manage Auto-Payment

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

Actor/Role: CSR

Description: If customer requires automatic payment on account enter auto-pay information. Refer to 4.3.1.1b Manage Auto-Payments

1.7 Enter Credit Or Cash-Only Score Information

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

Actor/Role: CSR

Description: If customer credit or cash-only score is required enter credit or cash-only score information the process is provided 3.4.2.2 Manage Customer Risk.

1.8 3.4.2.2 Manage Customer Risk

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

Actor/Role: CSR

Description: Customers credit risk processes are provided in 3.4.2.2 Manage Customer Risk.

1.9 Enter Budget Information

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

Actor/Role: CSR

Description: If customer requires a budget enter budget information the process is provided in 3.4.4.1a Enroll in Budget.

2.0 3.4.4.1a Enroll in Budget

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

Actor/Role: CSR

Description: Budget enrollment process is provided in 3.4.4.1a Enroll in Budget.

2.1 Initiate Cancel Budget

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

Actor/Role: CSR

Description: If budget cancellation required, initiate cancellation, the process is provided in 3.4.4.3a Cancel Budget.

2.2 3.4.4.3a Cancel Budget

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

Actor/Role: CSR

Description: Budget cancellation process is provided in 3.4.4.3a Cancel Budget.

2.3 Enter Customer Deposit

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

Actor/Role: CSR

Description: If customer deposit required, enter deposit information the process is provided in 3.3.3.2 Determine Customer Deposit (Cash, Non-cash, 3rd party).

2.4 3.3.3.2 Determine Customer Deposit, (Cash, Non-Cash, 3rd Party)

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

Actor/Role: CSR

Description: Cash, non-cash and third party deposit process is provided in 3.3.3.2 Determine Customer Deposit (Cash, Non-cash, 3rd party).

2.5 Search For Customer

Reference: [Maintain Customer Profile Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: As a result of a customer request, the first step is to determine if a person exist or create new person. The CSR is responsible for fulfilling customer requests.

2.6 Request Update Service Information

Reference: [Maintain Customer Profile Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User is responsible for updating service information on the premise.

2.7 3.3.2.1 Start Premise Based Service

Reference: [Maintain Customer Profile Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User starts service for a premise. Refer to 3.3.2.1 Start Premise Based Service.

2.8 Update Premise Information 5.1.5.1 Manage Metered Site

Reference: [Maintain Customer Profile Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User will update required information for the premise. Refer to 5.1.5.1 Manage Metered Site.

2.9 Update Service Agreement

Reference: [Maintain Customer Profile Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User will update required information for the service agreement.

3.0 Search For Customer

Reference: [Maintain Customer Profile Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: As a result of a customer request, the first step is to determine if a person exist or create new person. The CSR is responsible for fulfilling customer requests.

3.1 Request Update Service Information

Reference: [Maintain Customer Profile Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User is responsible for updating service information.

3.2 3.3.2.1 Start Non-Premise Based Service

Reference: [Maintain Customer Profile Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User starts service for a non-premise based service. Refer to 3.3.2.2 Start Non-Premise Based Service.

3.3 Update Service Information

Reference: [Maintain Customer Profile Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User is responsible for updating service information. Refer 5.1.5.2 Manage Un-Metered Site.

3.4 Update Service Agreement

Reference: [Maintain Customer Profile Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User updates required information for the Service Agreement.

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