

Oracle Utilities Customer Care & Billing Release 2.4.0

Utility Reference Model

3.4.3.1 CC&B Process Miscellaneous Customer
Requests

December 2015

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3.4.3.1 Process Miscellaneous Customer Requests

This section provides a description of the “Process Miscellaneous Customer Requests” business process. This includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Process Miscellaneous Customer Requests Process Model - Page 1](#)
 - ♦ [Process Miscellaneous Customer Requests Process Model - Page 2](#)
 - ♦ [Process Miscellaneous Customer Requests Process Model - Page 3](#)
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 - ♦ [Process Miscellaneous Customer Requests Process Model - Page 8](#)
- ♦ [Process Miscellaneous Customer Requests Detailed Process Model Description](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 3.4.3.1 CC&B Process Miscellaneous Customer Requests

Process Type: Sub-Process

Parent Process: 3.4.3 CC&B Provide Customer Service

Sibling Processes: n/a

This process describes how miscellaneous customer requests are determined and processed within the system.

Actors/Roles

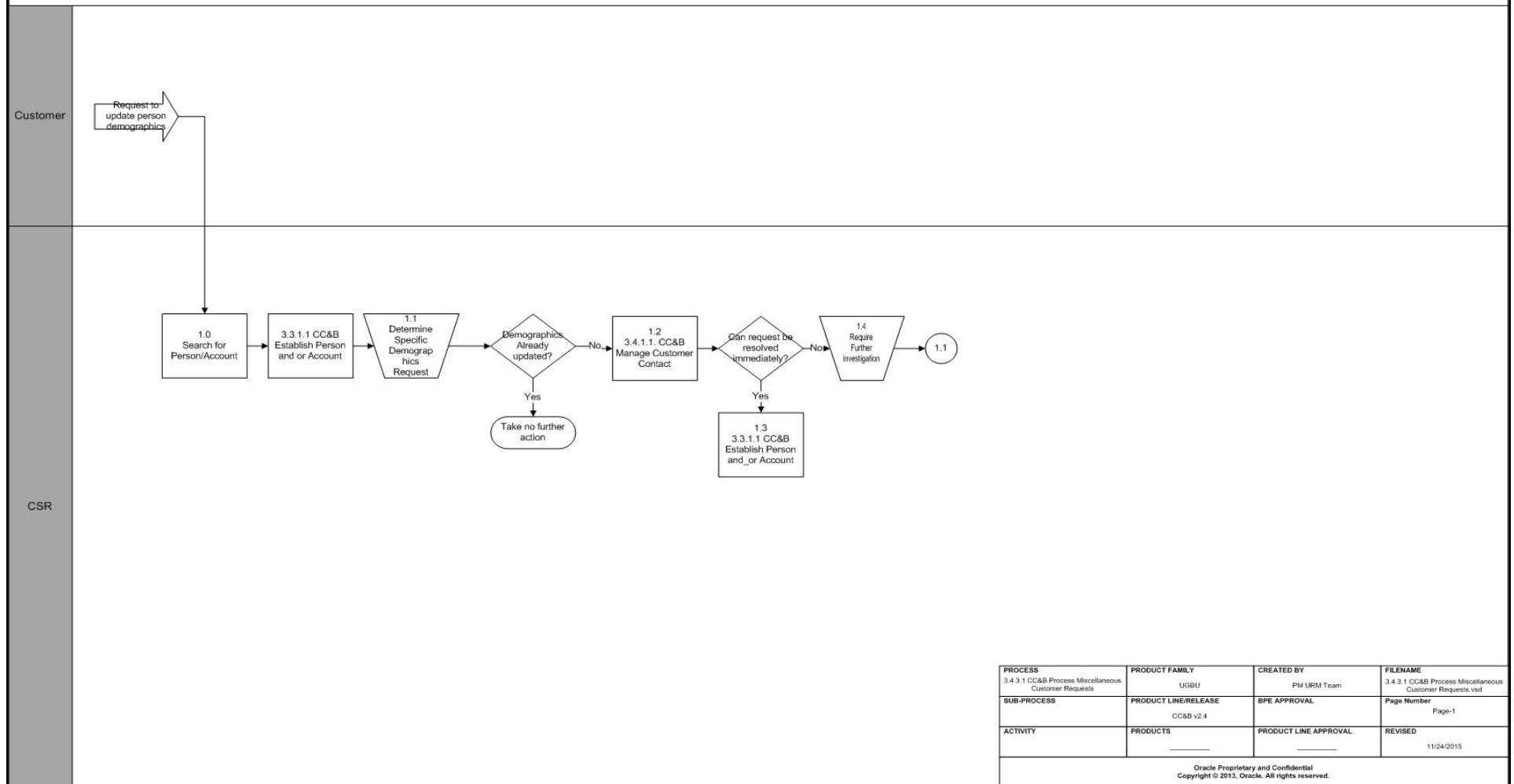
The Process Miscellaneous Customer Requests business process involves the following actors and roles.

- **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

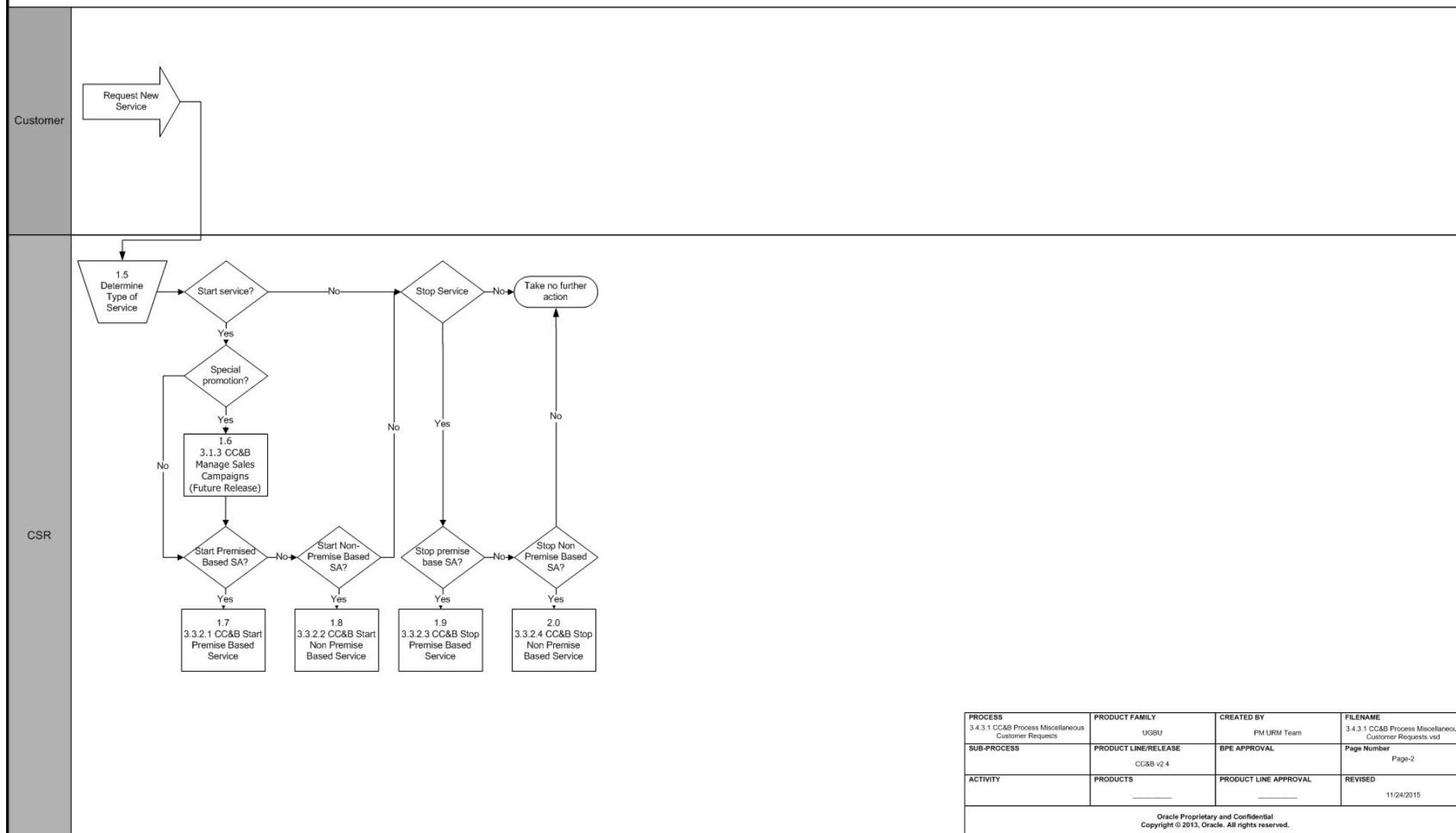
Process Miscellaneous Customer Requests Process Model - Page 1

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



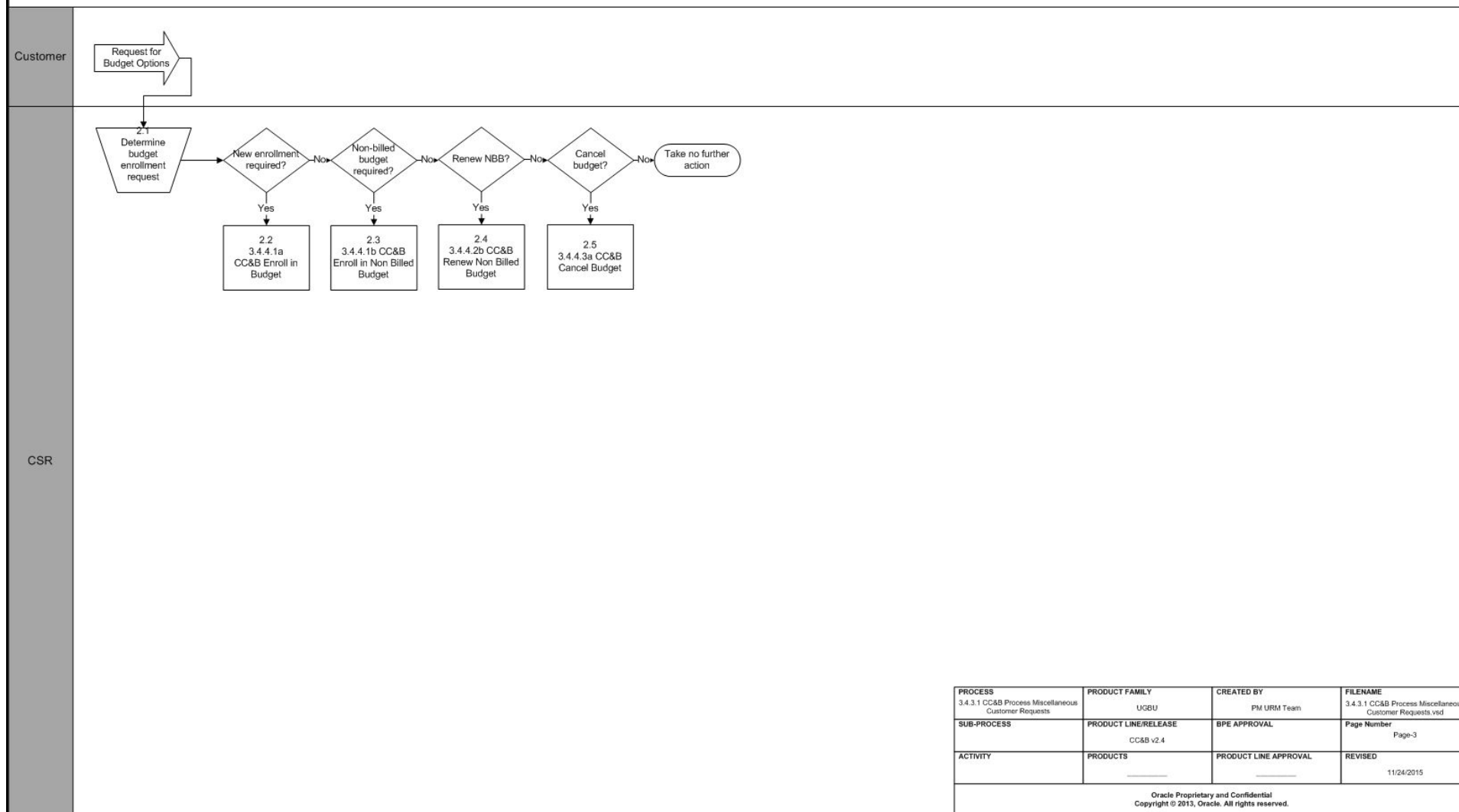
Process Miscellaneous Customer Requests Process Model - Page 2

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



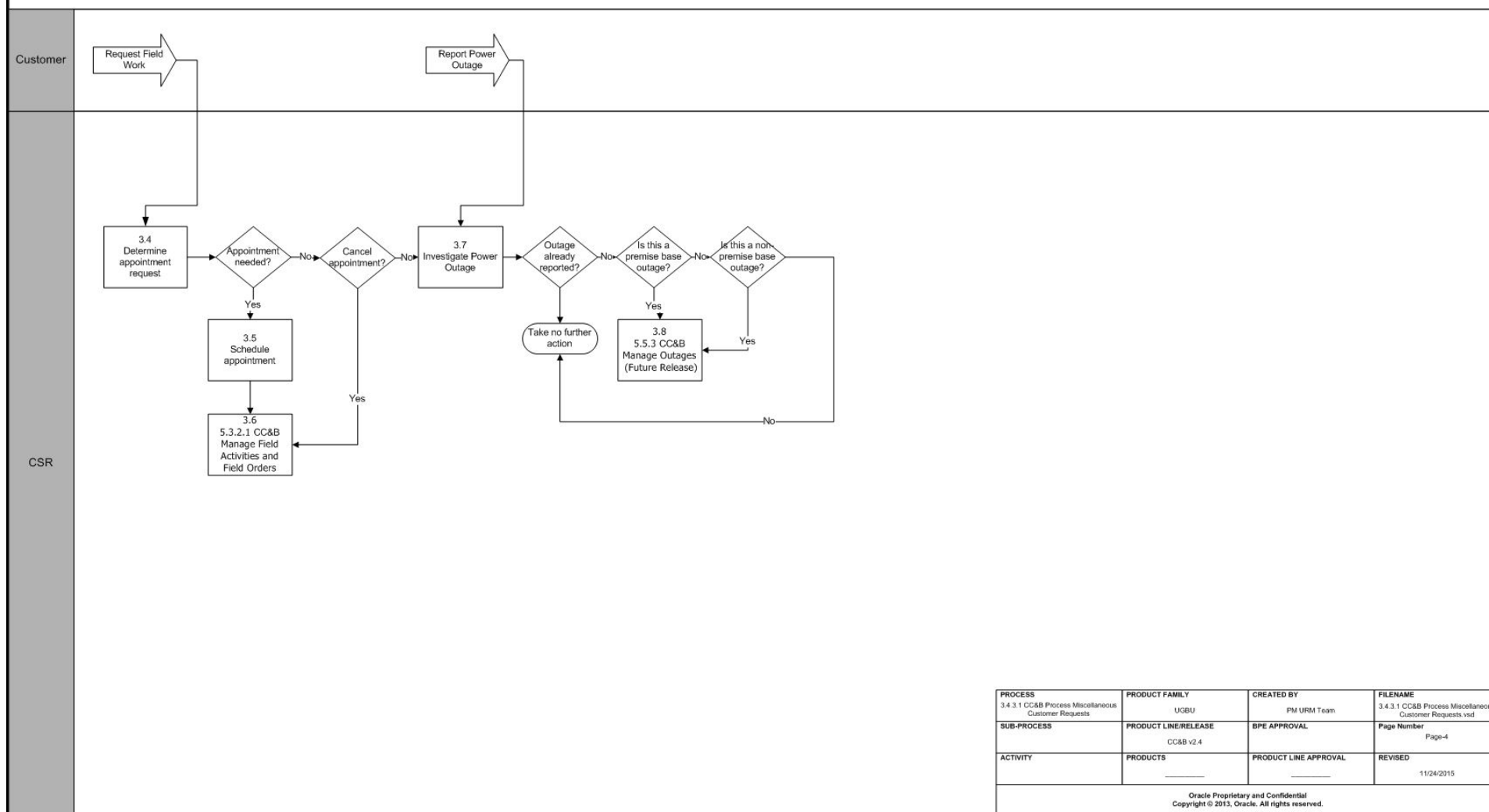
Process Miscellaneous Customer Requests Process Model - Page 3

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



Process Miscellaneous Customer Requests Process Model - Page 4

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*

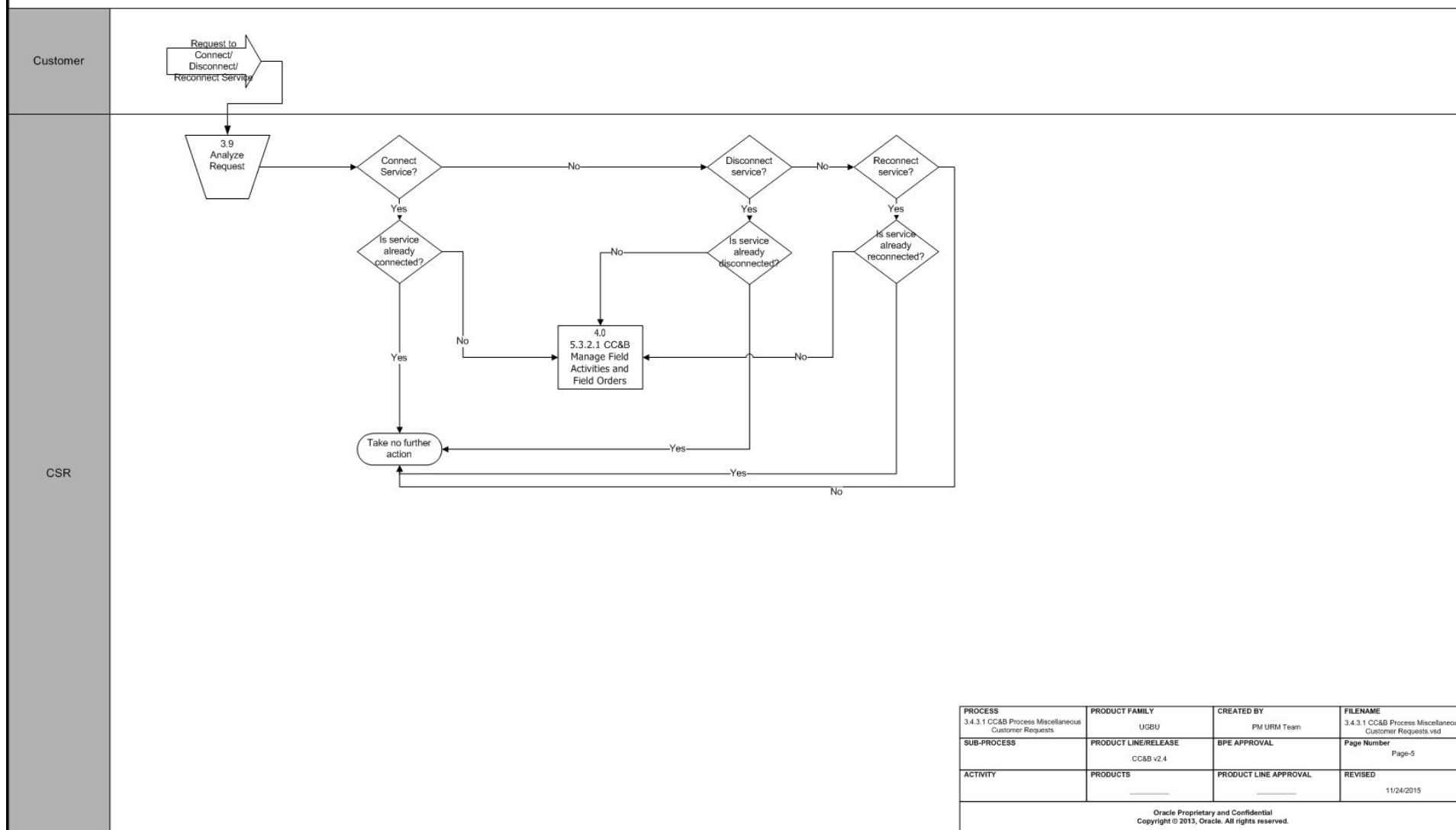


PROCESS 3.4.3.1 CC&B Process Miscellaneous Customer Requests	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.4.3.1 CC&B Process Miscellaneous Customer Requests.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE CC&B v2.4	BPE APPROVAL	Page Number Page-4
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 11/24/2015

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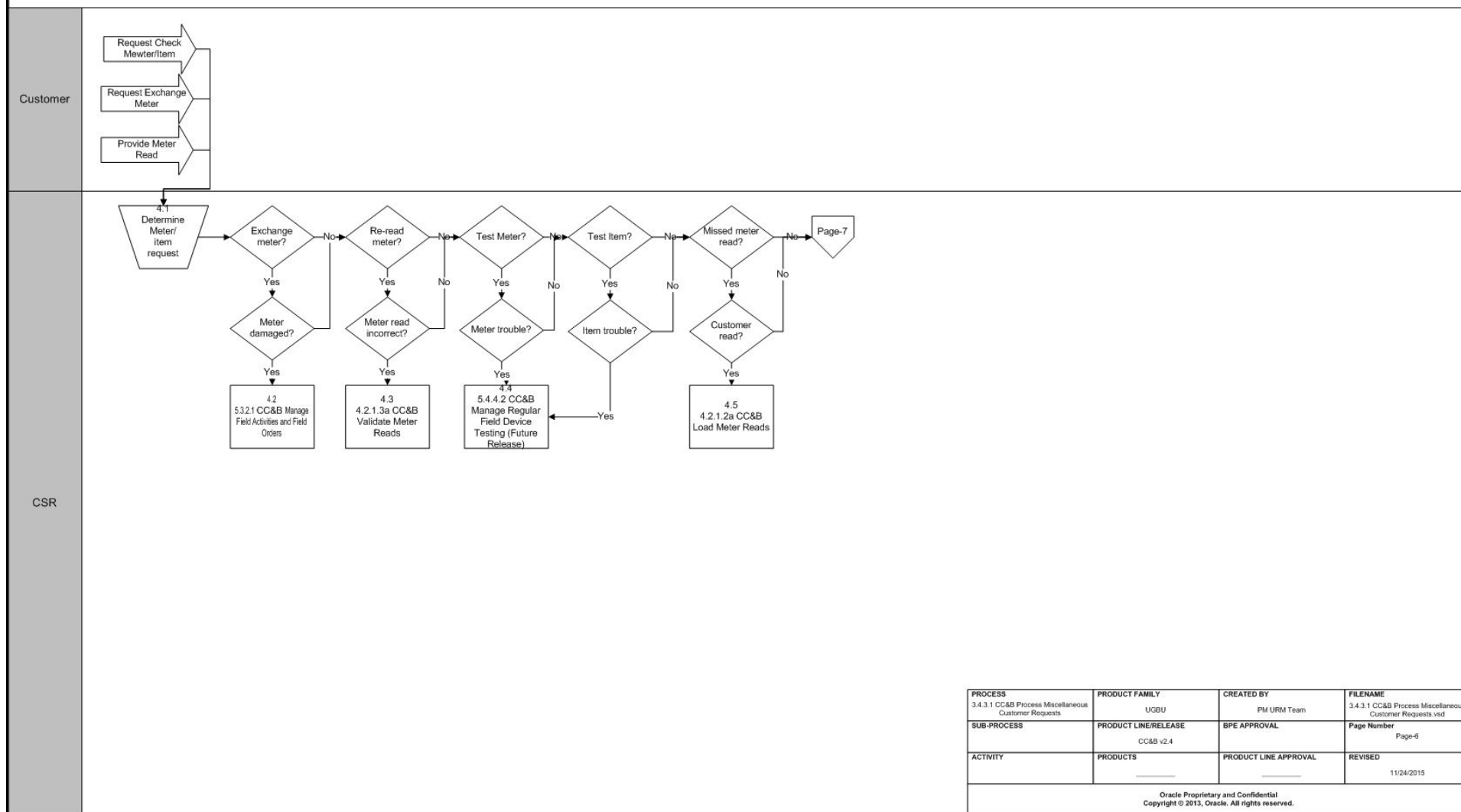
Process Miscellaneous Customer Requests Process Model - Page 5

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



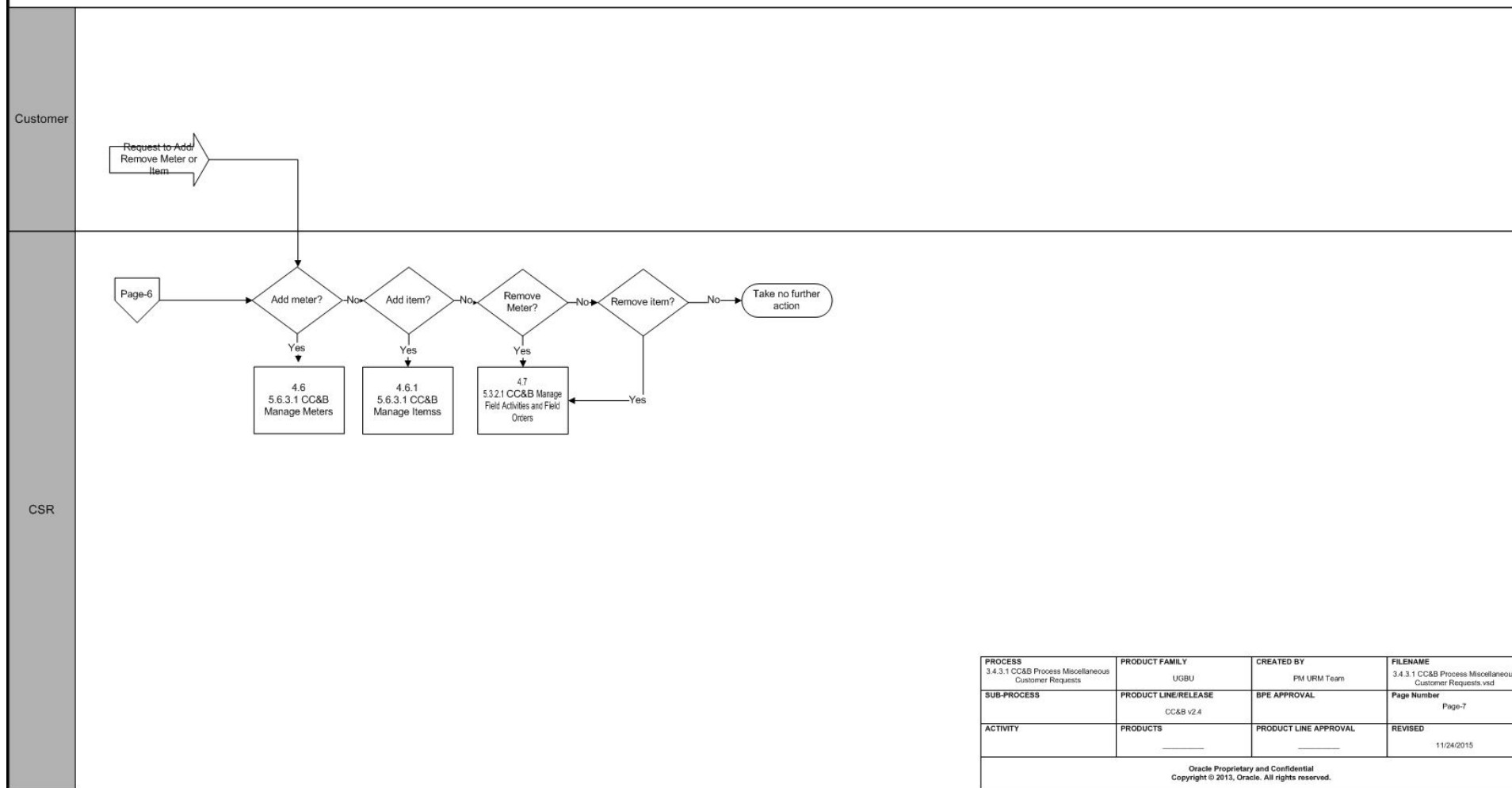
Process Miscellaneous Customer Requests Process Model - Page 6

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



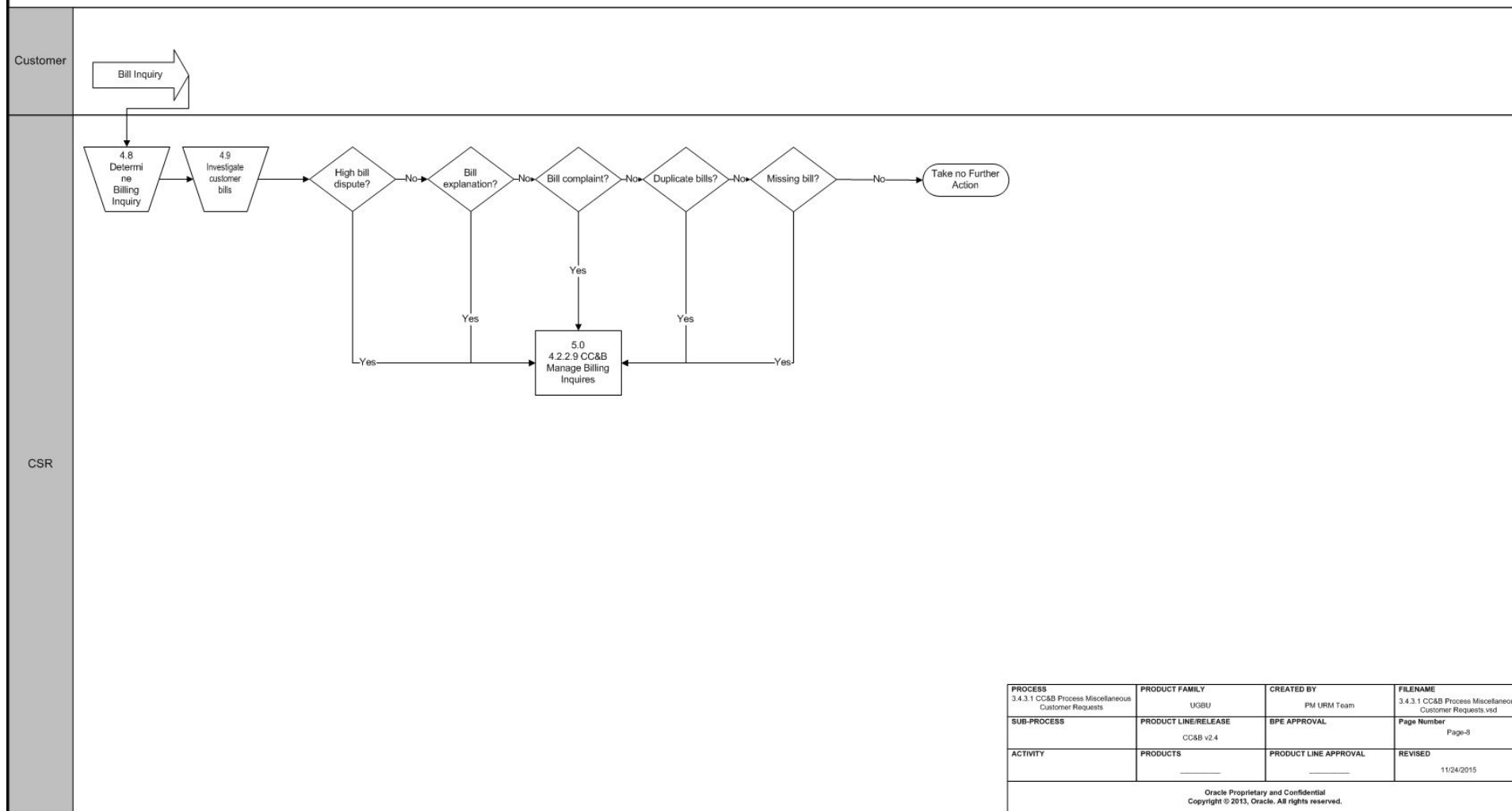
Process Miscellaneous Customer Requests Process Model - Page 7

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



Process Miscellaneous Customer Requests Process Model - Page 8

3.4.3.1 CC&B v2.4 *Process Miscellaneous Customer Requests*



Process Miscellaneous Customer Requests Detailed Process Model Description

This section provides a detailed description of the “Process Miscellaneous Customer Requests” business process, including:

- ♦ 1.0 Search for Person/Account
- ♦ 1.1 Determine Specific Information Request
- ♦ 1.2 3.4.1.1 Manage Customer Contact
- ♦ 1.3 3.3.1.1 Establish Person and/or Account
- ♦ 1.4 Require Further Investigation
- ♦ 1.5 Determine Type of Service Request
- ♦ 1.6 3.1.3 Manage Sales Campaigns (Future Release)
- ♦ 1.7 3.3.2.1 Start Premise Based Service
- ♦ 1.8 3.3.2.2 Start Non-Premise Based Service
- ♦ 1.9 3.3.2.3 Stop Premise Based Service
- ♦ 2.0 3.3.2.4 Stop Non-Premise Based Service
- ♦ 2.1 Determine Budget Enrollment Request
- ♦ 2.2 3.4.4.1a Enroll in Budget
- ♦ 2.3 3.4.4.1b Enroll in Non-Billed Budget
- ♦ 2.4 3.4.4.2b Renew Non-Billed Budget
- ♦ 2.5 3.4.4.3a Cancel Budget
- ♦ 3.4 Determine Appointment Request
- ♦ 3.5 Schedule Appointment
- ♦ 3.6 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 3.7 Investigate Power Outage
- ♦ 3.8 5.5.3 Manage Outages (Future Release)
- ♦ 3.9 Determine Connection Service Request
- ♦ 4.0 5.3.2.2 Complete Physical Connection/Disconnection (Future Release)
- ♦ 4.1 Determine Meter/Item Request
- ♦ 4.2 5.3.2.2 Complete Physical Connection-Disconnection (Exchange) (Future Release)
- ♦ 4.3 4.2.1.3a Validate Meter Reads
- ♦ 4.4 5.4.4.2 Manage Regular Field Device Testing (Future Release)
- ♦ 4.5 4.2.1.2a Load Meter Reads
- ♦ 4.6 5.6.3.1 Manage Meters
- ♦ 4.7 5.3.2.2 Complete Physical Connection-Disconnection (Removal) Future Release
- ♦ 4.8 Determine Billing Inquiry
- ♦ 4.9 Investigate Customer Bills
- ♦ 5.0 4.2.2.9 Manage Billing Inquires

1.0 Search for Person/Account

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

Actor/Role: CSR

Description: Search for existing person/account.

1.1 Determine Specific Information Request

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

Actor/Role: CSR

Description: CSR or Authorized User decides type of information to update.

1.2 3.4.1.1 Manage Customer Contact

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

Actor/Role: CSR, CC&B

Description: Keep record of reason for customer contact. The process is provided in 3.4.1.1 Manage Customer Contact.

1.3 3.3.1.1 Establish Person and/or Account

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

Actor/Role: CSR, CC&B

Description: Update person demographic request, the process provided in 3.3.1.1 Establish Person and/or Account.

1.4 Require Further Investigation

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

Actor/Role: CSR

Description: If information request cannot be resolved immediately then further investigation is required.

1.5 Determine Type of Service Request

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

Actor/Role: CSR

Description: CSR or Authorized User decides the type of service customer request.

1.6 3.1.3 Manage Sales Campaigns (Future Release)

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

Actor/Role: CSR, CC&B

Description: If a special promotion is offered, the process is provided in 3.1.3 Manage Sales Campaigns.

1.7 3.3.2.1 Start Premise Based Service

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

Actor/Role: CSR, CC&B

Description: If a premise-based service is required, the process is provided in 3.3.2.1 Start Premise Based Service.

1.8 3.3.2.2 Start Non-Premise Based Service

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

Actor/Role: CSR, CC&B

Description: If a non-premise based service is required, the process is provided in 3.3.2.2 Start Non-Premise Based Service.

1.9 3.3.2.3 Stop Premise Based Service

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

Actor/Role: CSR, CC&B

Description: If a stop premise based service is required, the process is provided in 3.3.2.3 Stop Premise Based Service.

2.0 3.3.2.4 Stop Non-Premise Based Service

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

Actor/Role: CSR, CC&B

Description: If a stop non-premise based service is required, the process is provided in 3.3.2.4 Stop Non-Premise Based Service.

2.1 Determine Budget Enrollment Request

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

Actor/Role: CSR

Description: CSR or Authorized User decides budget recommendation.

2.2 3.4.4.1a Enroll in Budget

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

Actor/Role: CSR, CC&B

Description: If a budget enrollment is required, the process is provided in 3.4.4.1a Enroll in Budget.

2.3 3.4.4.1b Enroll in Non-Billed Budget

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

Actor/Role: CSR, CC&B

Description: If a non-billed budget enrollment is required, the process is provided in 3.4.4.1b Enroll in Non-Billed Budget.

2.4 3.4.4.2b Renew Non-Billed Budget

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

Actor/Role: CSR, CC&B

Description: If a non-billed budget renewal is required, the process is provided in 3.4.4.2b Renew Non-Billed Budget.

2.5 3.4.4.3a Cancel Budget

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

Actor/Role: CSR, CC&B

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

3.4 Determine Appointment Request

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

Actor/Role: CSR

Description: The CSR or Authorized User will decide the type of appointment request to perform a field activity.

3.5 Schedule Appointment

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

Actor/Role: CSR

Description: The CSR or Authorized User will schedule an appointment if needed.

3.6 5.3.2.1 Manage Field Activities and Field Orders

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

Actor/Role: CSR, CC&B

Description: If an appointment scheduling or cancellation is required, the process is provided in 5.3.2.1 Manage Field Activities and Field Orders.

3.7 Investigate Power Outage

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

Actor/Role: CSR

Description: The CSR or Authorized User confirms reported power outage.

3.8 5.5.3 Manage Outages (Future Release)

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

Actor/Role: CSR, CC&B

Description: If a power outage is reported at a premise or a non-premise the outage process is provided in 5.5.3 Manage Outages.

3.9 Determine Connection Service Request

Reference: [Process Miscellaneous Customer Requests Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User decides to connect, disconnect or reconnect service.

4.0 5.3.2.2 Complete Physical Connection/Disconnection (Future Release)

Reference: [Process Miscellaneous Customer Requests Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If a customer requires connect, disconnect or reconnect service, the process is provided in 5.3.2.2 Complete Physical Connection/Disconnection.

4.1 Determine Meter/Item Request

Reference: [Process Miscellaneous Customer Requests Process Model - Page 5 on page 7](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User decides the type of meter/item request.

4.2 5.3.2.2 Complete Physical Connection-Disconnection (Exchange) (Future Release)

Reference: [Process Miscellaneous Customer Requests Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If a meter is damaged, the exchange process is provided in 5.3.2.2 Complete Physical Connection-Disconnection (Exchange).

4.3 4.2.1.3a Validate Meter Reads

Reference: [Process Miscellaneous Customer Requests Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If a meter read is incorrect, the meter read validation process is provided in 4.2.1.3a Validate Meter Reads.

4.4 5.4.4.2 Manage Regular Field Device Testing (Future Release)

Reference: [Process Miscellaneous Customer Requests Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If there is trouble with a meter or item, the testing process is provided in 5.4.4.2 Manage Regular Field Device Testing.

4.5 4.2.1.2a Load Meter Reads

Reference: [Process Miscellaneous Customer Requests Process Model - Page 6 on page 8](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If meter was misread and is a customer read meter the process is provided in 4.2.1.2a Load Meter Reads.

4.6 5.6.3.1 Manage Meters

Reference: [Process Miscellaneous Customer Requests Process Model - Page 7 on page 9](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If there is no meter or item located at service point the to add a meter or item is provided in 5.6.3.1 Manage meters.

4.7 5.3.2.2 Complete Physical Connection-Disconnection (Removal) Future Release

Reference: [Process Miscellaneous Customer Requests Process Model - Page 7 on page 9](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If meter or item is located at a non-billable service point, the process to remove meter or item is provided in 5.3.2.2 Complete Physical Connection-Disconnection (Removal).

4.8 Determine Billing Inquiry

Reference: [Process Miscellaneous Customer Requests Process Model - Page 8 on page 10](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User decides the type of billing inquiry.

4.9 Investigate Customer Bills

Reference: [Process Miscellaneous Customer Requests Process Model - Page 8 on page 10](#) for the associated business process diagram.

Actor/Role: CSR

Description: Customer billing is researched by the CSR.

5.0 4.2.2.9 Manage Billing Inquires

Reference: [Process Miscellaneous Customer Requests Process Model - Page 8 on page 10](#) for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: If a customer has the following billing issues, the process is provided in 4.2.2.9 Manage Billing Inquires:

- High bill dispute
- Bill explanation
- Bill complaint
- Duplicate bills
- Missing bills

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