

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

Utility Reference Model

3.4.3.3 Process Customer Request

December 2015

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

---

---

# Contents

## 3.4.3.3 Process Customer Request

<b>3.4.3.3 Process Customer Request For Literature and Forms.....</b>	<b>1</b>
Brief Description .....	2
Actors/Roles.....	2
Business Process Diagrams.....	3
Process Customer Request For Literature and Forms Process Model - Page 1 .....	3
Process Customer Request For Literature and Forms Detailed Process Model Description .....	4
1.0 Analyze Request.....	5
1.1 Search For Customer .....	5
1.2 Add Person .....	5
1.3 Enter Customer Contact.....	5
1.4 Identify Document Or Form To Send.....	5
1.5 Request To Email Literature Or Form.....	5
1.6 Generate Email And Send To Customer.....	6
1.7 Receive Email Literature Or Form .....	6
1.8 Request To Print Literature Or Form .....	6
1.9 Print And Send To Customer.....	6
1.10 Receive Postal Literature Or Form.....	7
Related Training.....	8



---

## 3.4.3.3 Process Customer Request For Literature and Forms

This section provides a description of the “Process Customer Request For Literature and Forms” business process. It includes:

- ♦ [Brief Description](#)
  - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Process Customer Request For Literature and Forms Process Model - Page 1](#)
- ♦ [Process Customer Request For Literature and Forms Detailed Process Model Description](#)
- ♦ [Related Training](#)

## Brief Description

**Business Process:** 3.4.3.3 Process Customer Request For Literature And Forms

**Process Type:** Sub-Process

**Parent Process:** 3.4 Manage Customer Relationship

**Sibling Processes:** 3.4.1.1 Manage Customer Contact

This process takes place, when a customer requests or needs some information in the format of literature or a form. We now provide a fast and effective way for a CSR or Authorized to deliver that information using the new Literature Request zone.

## Actors/Roles

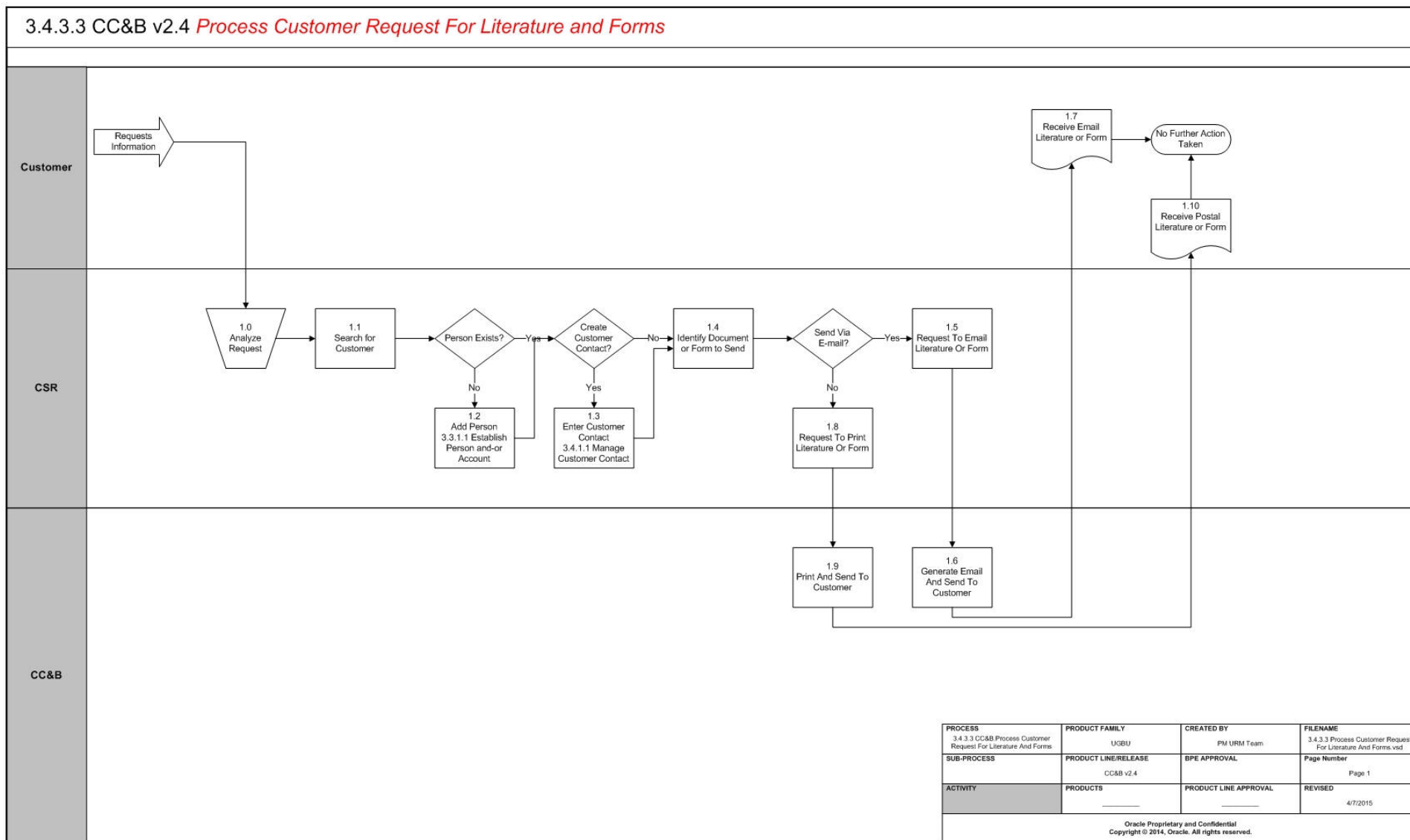
The Process Customer Request For Literature and Forms business process involves the following actors and roles.

- **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 Customer Request For Literature and Forms Process Model - Page 1

### 3.4.3.3 CC&B v2.4 *Process Customer Request For Literature and Forms*



## Process Customer Request For Literature and Forms Detailed Process Model Description

This section provides a detailed description of the “Process Customer Request For Literature and Forms” business process, including:

- ♦ [1.0 Analyze Request](#)
- ♦ [1.1 Search For Customer](#)
- ♦ [1.2 Add Person](#)
- ♦ [1.3 Enter Customer Contact](#)
- ♦ [1.4 Identify Document Or Form To Send](#)
- ♦ [1.5 Request To Email Literature Or Form](#)
- ♦ [1.6 Generate Email And Send To Customer](#)
- ♦ [1.7 Receive Email Literature Or Form](#)
- ♦ [1.8 Request To Print Literature Or Form](#)
- ♦ [1.9 Print And Send To Customer](#)
- ♦ [1.10 Receive Postal Literature Or Form](#)



## 1.0 Analyze Request

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User decides what type of information the customer is seeking.

## 1.1 Search For Customer

**Reference:** [Process Customer Request For Literature and Forms 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 exists or if a new person has to be created.

## 1.2 Add Person

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If a person needs to be added, the CSR or Authorized User navigates to Person Page to add information. This process is provided in 3.3.1.1 Establish Person and/or Account.

## 1.3 Enter Customer Contact

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User creates a customer contact pertaining to the literature or form and how it was sent to the customer, Email or post. This process is provided in 3.4.1.1 Manage Customer Contact.

## 1.4 Identify Document Or Form To Send

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User asks customer what information or Form is needed and if he/she prefer to receive it via email or postal service.

## 1.5 Request To Email Literature Or Form

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User navigates to the Dashboards Literature Request Zone, accesses the Email for Literature or Form.

## 1.6 Generate Email And Send To Customer

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CSR or Authorized User generates the email and sends it on to the customer.

### Entities to Configure

- Characteristic Type: CM\_FILE
- Portal: CI\_DASHBOARD-Dashboard
- Zone Type: F1\_DE\_SINGLE-Infor Date Explore, Single SQL
- Zone: CI\_DOCTDB-Literature Request

### Business Objects

- BO CI\_DocumentTemplate - Document Templates

**Note:** Populate Option Type File Directory with spl/V230\_CCB\_DEMO\_BLD21\_LIN\_ORA\_WLS/splapp/billView/, (Emailing Files); Defines the default file directory in which files need to be stored to be attachable to emails.

## 1.7 Receive Email Literature Or Form

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** Customer

**Description:** Customer receives Literature or Form via email

## 1.8 Request To Print Literature Or Form

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User navigates to the Dashboards Literature Request Zone and selects the requested document in PDF format.

## 1.9 Print And Send To Customer

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CSR or Authorized User prints the literature or form and mails it on to the customer.

### Entities to Configure

- Characteristic Type: CM\_FILE
- Portal: CI\_DASHBOARD-Dashboard
- Zone Type: F1\_DE\_SINGLE-Infor Date Explore, Single SQL
- Zone: CI\_DOCTDB-Literature Request

### Business Objects

- BO CI\_DocumentTemplate - Document Templates

**Note:** Populate Option Type File Directory with spl/V230\_CCB\_DEMO\_BLD21\_LIN\_ORA\_WLS/splapp/billView/, (Emailing

Files); Defines the default file directory in which files need to be stored to be attachable to emails.

**Note:** Populate Option Type File Directory with spl  
V230\_CCB\_DEMO\_BLD21\_LIN\_ORA\_WLS/splapp/billView/, (Emailing  
Files); Defines the default file directory in which files need to be stored to be  
attachable to emails

## 1.10 Receive Postal Literature Or Form

**Reference:** [Process Customer Request For Literature and Forms Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** Customer

**Description:** Customer receives Literature or Form through the postal service.

## 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