



C2M.v2.7.CCB

3.4.1.1 Manage Customer Contacts

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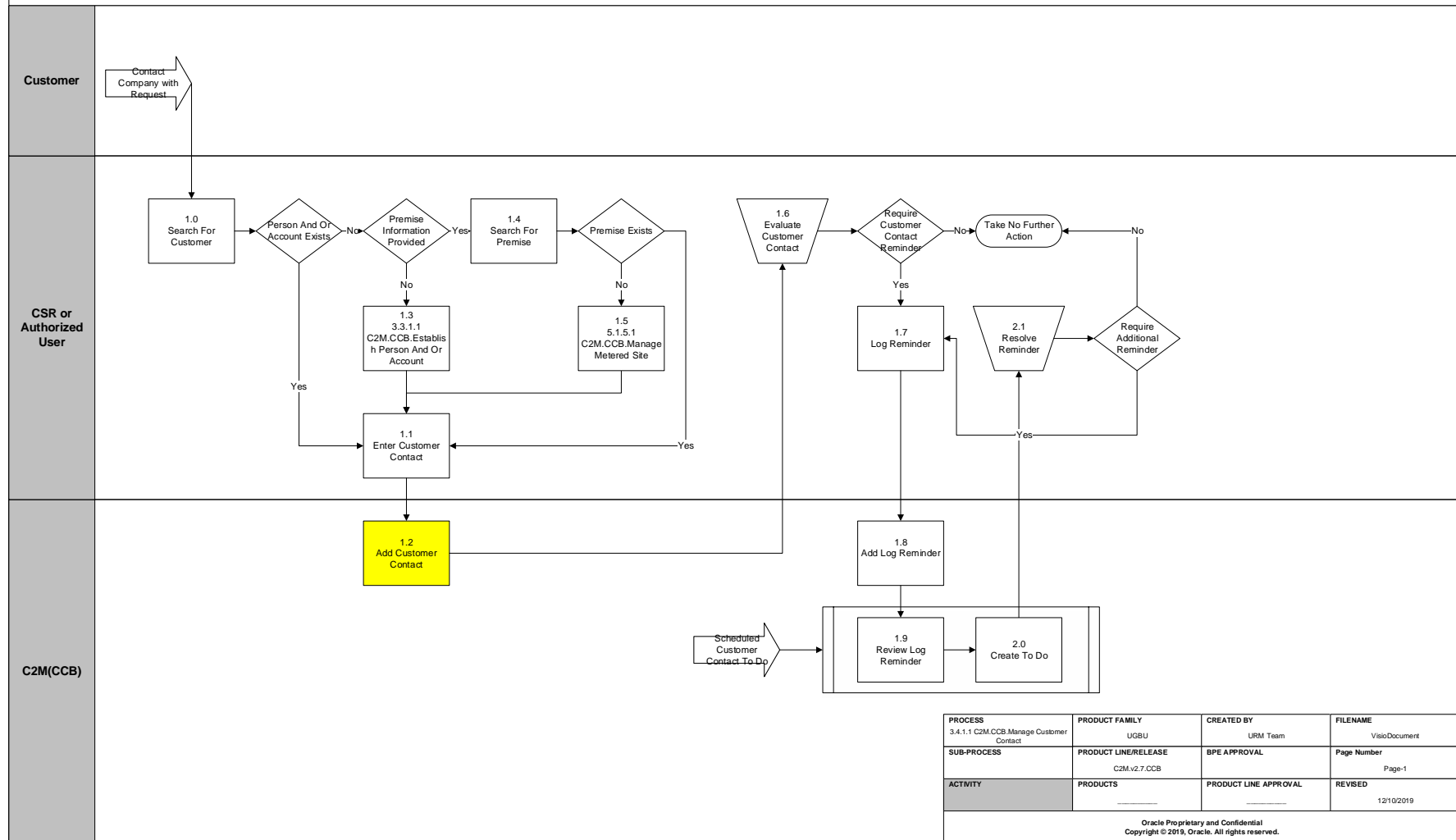
Brief Description

Business Process: 3.4.1.1 C2M.CCB.Manage Customer Contacts
Process Type: Process
Parent Process: 3.4.1 C2M.CCB.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, SMS and Email). This process provides information how customer contacts are created and utilized in the system.

Business Process Model Page-1

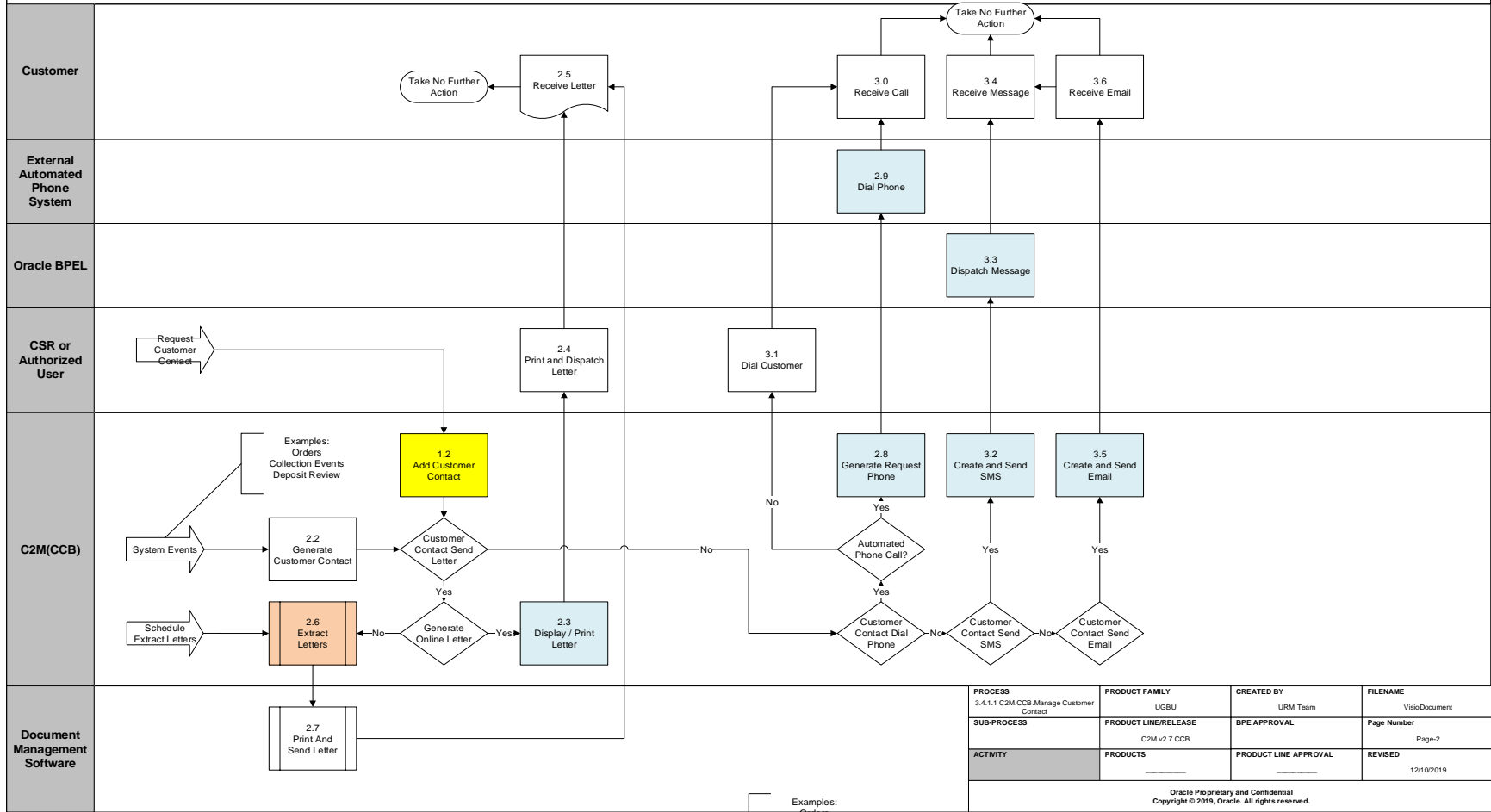
3.4.1.1 C2M.v2.7.CCB *Manage Customer Contacts. Inbound Customer Contacts*



| | | | |
|---|--------------------------------------|------------------------|---------------------------|
| PROCESS 3.4.1.1 C2M.CCB.Manage Customer Contact | PRODUCT FAMILY UGBU | CREATED BY URM Team | FILENAME VisioDocument |
| SUB-PROCESS | PRODUCT LINE/RELEASE C2M.v2.7.CCB | BPE APPROVAL | Page Number Page-1 |
| ACTIVITY | PRODUCTS | PRODUCT LINE APPROVAL | REVISED 12/10/2019 |
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Business Process Model Page-2

3.4.1.1 C2M.v2.7.CCB *Manage Customer Contacts. Outbound Customer Contacts*



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

When a customer contacts the company, the CSR or Authorized User searches for an existing customer through Person and or Account.

1.1 Enter Customer Contact

Actor/Role: CSR or Authorized User

Description:

If a person And Or Premise exists, the CSR or Authorized User will enter customer contact information to maintain records on [Customer Contact Page](#).

1.2 Add Customer Contact

Actor/Role: C2M(CCB)

Description:

The system adds and store customer contact information.

| | | |
|----------------------------------|--------------------------------|--|
| Process Plug-in enabled Y | Available Algorithm(s): | C1-TL-CC-EVT - Build Customer Contact Events |
| Configuration required Y | Entities to Configure: | CIS Division |
| | | Customer Contact Class |
| | | Customer Contact Type |
| | | Installation Options-Framework |
| | | Zone |
| Business Object Y | Business Object: | C1-CreateCustomerContact |

1.3 3.3.1.1 Establish Person and or Account

Actor/Role: CSR or Authorized User

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 Search for Premise

Actor/Role: CSR or Authorized User

Description:

When a customer contacts the company with address information, the CSR or Authorized User searches for an existing premise.

1.5 5.1.5.1 Manage Metered Site

Actor/Role: CSR or Authorized User

Description:

If a premise does not exist the process to add a premise is provided in 5.1.5.1 Manage Metered Site.

1.6 Evaluate Customer Contact

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews customer contact records.

1.7 Log Reminder

Actor/Role: CSR or Authorized User

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](#).

| | | |
|----------------------------------|--------------------------------|--|
| Process Plug-in enabled Y | Available Algorithm(s): | F1-TDT-INFO - To Do Information (To Do Type) |
| | | F1-TDI-INFO - To Do information (Installation) |
| | | F1-VAL-SKILL - Validate Skills: E (Error) or W (Warning) |
| | | CCAL-TD - Highlight outstanding to do entries |

| | | |
|---------------------------------|-------------------------------|------------|
| Configuration required Y | Entities to Configure: | To Do Role |
| | | To Do Type |

1.8 Add Log Reminder

Actor/Role: C2M(CCB)

Description:

The system adds and store log reminders.

1.9 Review Log Reminder

Actor/Role: C2M(CCB)

Description:

The system reviews customer contact reminders.

2.0 Create To Do

Actor/Role: C2M(CCB)

Description:

A background batch process creates a To Do entry for customer contacts that have been flagged to generate a future date To Do.

Configuration required Y **Entities to Configure:**

| |
|---|
| To Do Role |
| To Do Type |
| Batch Scheduler - Feature Configuration |
| Batch Control |

Customizable process N **Process Name:**

| |
|--------------------------------------|
| TD-CCCB - To Do for Customer Contact |
|--------------------------------------|

2.1 Resolve Reminder

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User resolves logged reminder.

2.2 Generate Customer Contact

Actor/Role: C2M(CCB)

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 and Campaign
- Lead Event
- Service Credit Membership
- Non Billed Budget Service Agreement Activation
- Meter Reader Remark
- Field Activity Remarks
- Adjustment
- Deposit Review
- Collection Events
- Severance Events
- Write Offs
- Overdue and Cut Process
- Case Management

Process Plug-in enabled Y Available Algorithm(s):

| |
|--|
| CCEE-CC - Create a customer contact when order is completed (Customer Class) |
| CAOC-CC - Create customer contact when order is completed (Campaign) |
| C1-LETCRECC - Create Lead Customer Contact |
| SCMC-CC - SCM Creation - Create Customer Contact (Membership Creation) |
| SCMA-CC - SCM Activation - Create Customer Contact (Membership Activation) |
| SAAT-CC - SA Activation - Create Customer Contact (Non-billed Budget SA Activation) |
| CC BY TYPCL - Count number of customer contacts (Installation Option Framework - Control Center Alert) |
| MRRCRECC - Create Customer Contact (Meter Reader Remark - Remark Action) |
| FACT-CCC - FA Remark Activation - Create Customer Contact |
| C1-CREATECC - Create Customer Contact (Service Order Management) |
| C2M-ADJFRCC - Create customer contact (Adjustment Type - Adjustment Freeze) |
| C1-OE-CC - Create Customer Contact (Overdue Event Type - Event Activation) |
| C1-CE-CC - Create Customer Contact (Cut Event Type - Event Activation) |
| CSEN-CC - Create Customer Contact (Case Type - Enter Status) |

Configuration required Y Entities to Configure:

| |
|--------------------------------------|
| CIS Division |
| Customer Contact Class |
| Customer Contact Type |
| Customer Contact Characteristic Type |
| Navigation Option |
| Meter Reader Remark |
| Field Activity Type |
| Field Activity Remark |

| |
|---|
| Field Activity Characteristic Type |
| Field Activity Remark Characteristic Type |
| Service Task Characteristic Type |
| ToDo Type |
| ToDo Role |
| Campaign |
| Customer Class |
| Service Credit Membership Type |
| SA Type |
| Lead Event Type |
| Message Category |
| Message Number |
| Collection Process Template |
| Collection Event Type |
| Severance Process Template |
| Severance Event Type |
| Write off Process Template |
| Write off Event Type |
| Overdue Process Template |
| Overdue Event Type |
| Cut Process Template |
| Cut Process Event Type |
| Case Type |

Business Object Y

Business Object:

| |
|--------------------------------|
| C1-CreateCustomerContact |
| C1-CreateCustContactTaskType |
| C1-LeadEvtTypeCreCCAbtlnitv |
| C1-ExpireCreditCardCustContact |
| C1-CreateCustomerContactTask |
| C2M-CreateAdjCustomerContact |
| C1-FWCustomerContact |

Process Scripts

Scripts:

| |
|--|
| C1-CreCustCn - Create Customer Contact (Plugin Script) |
| C1-CreCsCt - Create Customer Contact (Service Script) |
| C1-CreateCC - Create Customer Contact Task (Service Script) |
| C1-LdEvTyCCV - Create Customer Contact Event Type Validation |
| C1-LECCreCC - Create Lead Customer Contact |

| |
|--|
| C1-ExpCardLe - Activity Request - Auto Pay Expiring Credit Card Notice |
| C2M-AdjFrCC - Create CC on adjustment freeze (used on NSF adjustment type) |

Customizable Process **Process Name:** DEPRVW - Deposit Review Batch Job

2.3 Display / Print Letter

Actor/Role: C2M(CCB)

Description

Letter can be rendered / printed online through BI-Publisher as Report having an image of the letter in a PDF and displayed in an Adobe reader.

NOTE: Customer contacts that generate letters can only be Person-Based customer contacts.

Process Plug-in enabled N **Available Algorithm(s):** C1-ONLTR-RPT - Display a letter using BI Publisher
C1-LTREX-RPT

Configuration required Y **Entities to Configure:** Installation Options - Framework (System Event - Online Letter Image)

Customizable process Y **Process Name:** CI_LTRGN_ENG - Letter Print Report

2.4 Print and Dispatch Letter

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User will print and dispatch the letter to the customer.

2.5 Receive Letter

Actor/Role: Customer

Description:

Customer receives generated letter.

2.6 Extract Letters

Actor/Role: C2M(CCB)

Description

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

| | | |
|----------------------------------|--------------------------------|---|
| Process Plug-in enabled Y | Available Algorithm(s): | LTEX-GEN - Create generic letter extract records |
| | | LTEX_COL - Create collection event letter extract records |
| | | LTEX-SEV - Create severance event letter extract records |
| | | LTEX-WO - Create write-off event letter extract records |
| | | C1-OD-BILL - Create Overdue Event Letter Extract Records |
| | | LTEX-WF - Create workflow event letter extract records |
| | | |
| Configuration required N | Entities to Configure: | Collection Event Type |
| | | Severance Event Type |
| | | Write Off Event Type |
| | | Letter Template |
| Customizable process Y | Process Name: | LTRPRT - Letter Extract |

2.7 Print and Send Letter**Actor/Role:** Document Management System**Description:**

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

2.8 Generate Request Phone**Actor/Role:** C2M(CCB)**Description:**

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

| | | |
|---------------------------------|-------------------------------|---------------------------------|
| Customizable process Y | Process Name: | Automated Dialer Software |
| | | Automated Dialer User Interface |
| Configuration required Y | Entities to Configure: | Navigation Key |

2.9 Dial Phone**Actor/Role:** External Automated Phone System**Description:**

If an automated phone call is required the customer phone number is automatically processed through the External Automated Phone System.

3.0 Receive Call**Actor/Role:** Customer**Description:**

The customer receives a call from the company.

3.1 Dial Customer**Actor/Role:** CSR or Authorized User**Description:**

If a phone call is required the CSR or Authorized User will make a phone call to customer.

3.2 Create and Send SMS**Actor/Role:** C2M(CCB)**Description:**

If customer provided phone number that allows sending SMS, the system creates and sends the SMS to the customer.

Note: Service Script C1-SmsSend (Send SMS Message) is used to send message and Oracle BPEL is being used to send SMS to a given phone number.**Process Plug-in enabled Y**

| |
|--|
| C1-LDEVTYMVA(Create Email or SMS Message Validation) |
| F1-SMSSNDBPL - Oracle SMS Send |

Configuration required Y**Entities to Configure:**

| |
|---|
| Installation Options - Framework (SMS Send Service) |
| Feature Configuration - SMS Send Configuration |

Process Scripts**Script(s):**

| |
|-------------------------------|
| C1-SmsSend (Send SMS Message) |
|-------------------------------|

3.3 Dispatch Message**Actor/Role:** Oracle BPEL**Description:**

Oracle BPEL is being used to send SMS (Text) to a given phone number.

3.4 Receive Message**Actor/Role:** Customer**Description:**

The customer receives a SMS (Text) Message from the company.

3.5 Create and Send Email**Actor/Role:** C2M(CCB)**Description:**

If customer provided e-mail address, the system creates and sends the e-mail to the customer.

Note: The script C1-EmailSvc (Send Email) is responsible for sending once the email has been created

Process Plug-in enabled Y

| |
|--|
| C1-LDEVTYMVA(Create Email or SMS Message Validation) |
|--|

Configuration required Y

Entities to Configure:

| |
|---|
| Feature Configuration - External Messages |
| Outbound Message Type |
| External System |
| Message Sender |

Process Scripts

Script(s):

| |
|--------------------------|
| C1-EmailSvc (Send Email) |
|--------------------------|

3.6 Receive Email

Actor/Role: Customer

Description:

The customer receives an Email from the company.

Test Documentation related to the Current Process

| ID | Document Name | Test Type |
|----|---------------|-----------|
| | | |
| | | |
| | | |

Document Control

Change Record

| Date | Author | Version | Change Reference |
|------------|-----------------------------------|-------------|-------------------------|
| 8/11/2017 | Kashif Q. Qureshi | Draft | Updated for C2M |
| 8/18/2017 | Kashif Q. Qureshi | Final Draft | |
| 09/20/2017 | Galina Polonsky | | Reviewed, Approved |
| 06/03/2019 | Satya Kalavala | | Updated format for v2.7 |
| | | | |
| | | | |

Attachments

Customer Contact Page



Microsoft Word
Document

Customer Contact Log Entry Page



Microsoft Word
Document

Customer Contact Characteristic Page



Microsoft Word
Document

Customer Contact Methods



Microsoft Word
Document