Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

3.3.1.1 Establish Person and or Accounts

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Chapter 1

Overview

This chapter provides a brief description of the Establish Person and or Account business process and associated process diagrams. This includes:

- **Brief Description**
  - **Actors/Roles**

Brief Description

Business Process: 3.3.1.1 Establish Person and or Account

Process Type: Process

Parent Process: 3.3.1. Gather and Maintain Customer Information

Sibling Processes:

Typically customers call in to request service and add or remove person/s from account. This process describes how person/s and or account records are created, maintained and removed within CC&B.

Actors/Roles

The Establish Person and or Account 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.

Related Training

The following User Productivity Kit 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

Chapter 2

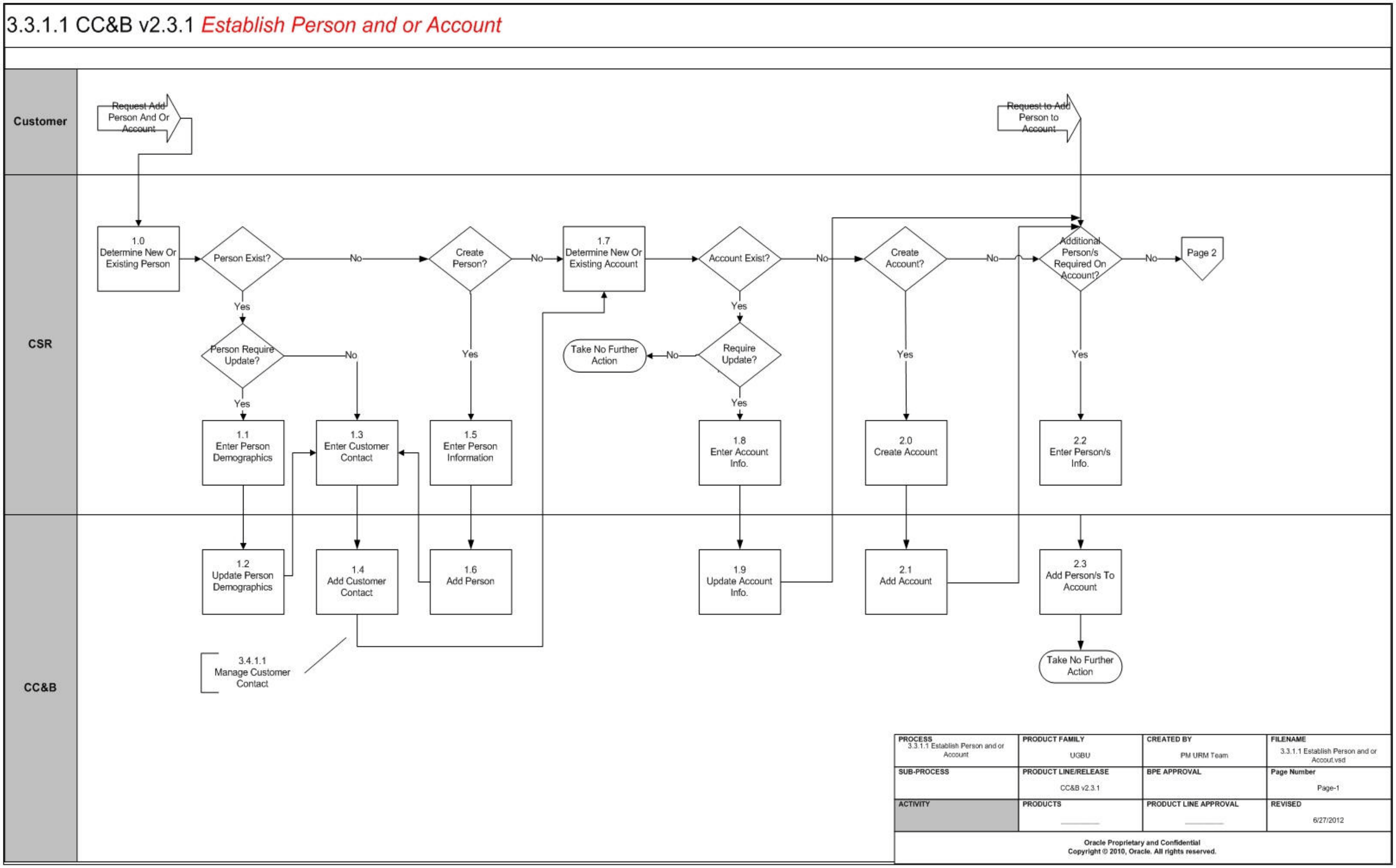
Detailed Business Process Model Description

This chapter provides a detailed description of the Establish Person and or Account business process. This includes:

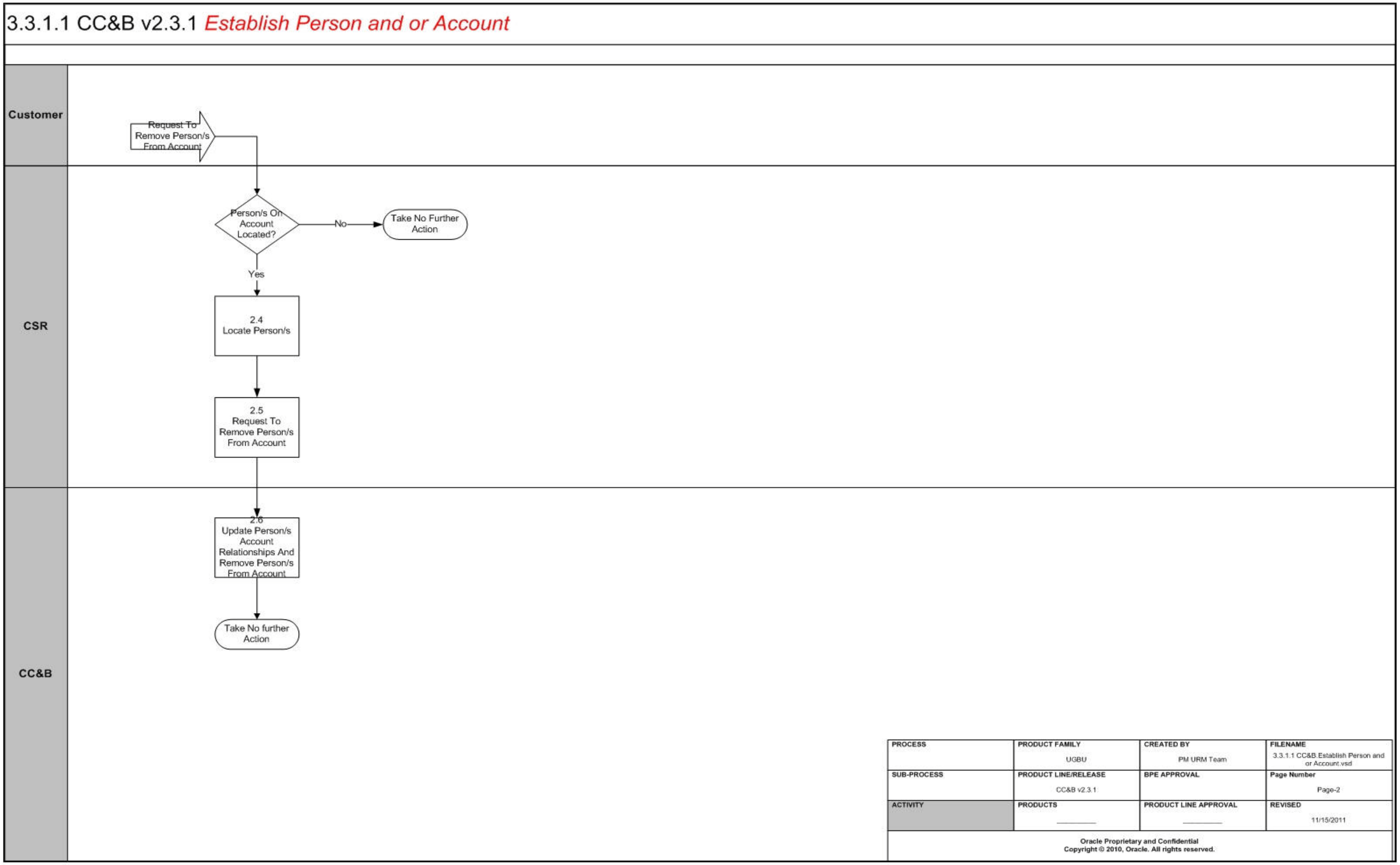
- **Business Process Diagrams**
    - **Establish Person and or Account Page 1**
    - **Establish Person and or Account Page 2**
- **Establish Person and or Account Description**
- **Related Training**

Business Process Diagrams

Establish Person and or Account Page 1



Establish Person and or Account Page 2



Establish Person and or Account Description

This section includes detailed descriptions of the steps involved in the Establish Person and or Account business process, including:

- **1.0 Determine if new or existing person**
- **1.1 Enter Person Demographics**
- **1.2 Update Person Demographics**
- **1.3 Enter Customer Contact**
- **1.4 Add Customer Contact**
- **1.5 Enter Person Information**
- **1.6 Add Person**
- **1.8 Enter Account Information**
- **1.9 Update Account**
- **2.0 Create Account**
- **2.1 Add Account**
- **2.2 Enter Person/s Information**
- **2.3 Add Person/s to Account**
- **2.4 Locate Person/s on Account**
- **2.5 Remove Person/s from Account**
- **2.6 Person/s Removed from Account**

1.0 Determine if new or existing person

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

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 Enter Person Demographics

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If person demographic data requires updating, the CSR or Authorized User navigates to Person Page to update demographic data.

1.2 Update Person Demographics

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Person demographics are updated in CC&B.

Entities to Configure
Installation Options, Person
Installation Options-Framework, Algorithms, System Event: Person Information
Installation Options-Framework, Algorithms, System Event: Person Name Validation
Phone Type
Identifier Type

Business Objects based on Maintenance Object: Person

Business Objects	Available Algorithms
Business (Person business object for business)	CI_PERS-LF (Main name (alternate name))
C1-PersonContactDetails (Person - Get Contact Details)	PERS-INFO-LF (Main name (alternate name) - phone number)
CI_ClaimPersonContactDetails (Person - Get Contact Details For Rebate Claim)	LAST,FIRST (Person's name should be Last, First)
CI_PersonCustomerInfo (Person Details for Customer Info)	PHN-FMT-UK (United Kingdom phone format)
DR_Person (Data Replicator - Person)	PHN-FMT-US (North American phone format)
Human (Person business object for human)	ADVH-PHN (Validates phone numbers in a variety of formats)
Person (Person fields common to all person BOs)	ADHV-PHNUS (Validates phone numbers in North American format)
PersonBo (Person business object for BO characteristic)	ADHV-PHNUK (Validates phone numbers in UK format)
C1-MDM1Person (Person Information for MDM1 SA Sync)	
C1-NMSPerson (Person Information for NMS Sync)	

1.3 Enter Customer Contact

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User enters customer contact information to keep records on Customer Contact Page. Refer to process 3.4.1.1 Manage Customer Contacts.

1.4 Add Customer Contact

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User adds customer contact to keep records on Customer Contact Page. Refer to process 3.4.1.1 Manage Customer Contacts.

1.5 Enter Person Information

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If customer does not exist, enter person information on Person Page. CSR or Authorized User will need to know if this is a person or business, if person has life support or sensitive load equipment, person names, person phone numbers and person ids.

1.6 Add Person

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Person is added and stored to the system on Person Page. Refer to section 1.2 Update Person Demographics for configuration, algorithm and business object information.

1.7 Determine New or Existing Account

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: After person is established, CSR or Authorized User determines if account exists in the system or if there is a need to create new account.

1.8 Enter Account Information

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If account exists, but requires update, enter account information on theAccount Page. Entered Account information could be displayed differently based on CSR or Authorized User needs (main Account info could be configured for display to contain different info).

1.9 Update Account

See **Establish Person and or Account Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR, CC&B

Description: Account information is updated on Account Page.

Entities to Configure
Installation Options, Account
Customer Class
Currency
Access Group
Account Management Group
Bill Cycle
User ID
Auto Pay Source Type
Bill Message
Account Staging
Installation Options-Framework, Algorithms, System Event: Control Central Alert
COLLECTION CLASS CONTROL, CONDITION ALGORITHM:
Meter Reader Remark, Action Algorithm
Case Type, Lifecycle, System Event: Enter Processing
Field Activity Remark, System Event: Field Activity Remark Activation
Customer Class, System Event: Autopay Amount Over Limit

Business Objects	Available Algorithms
Account (Account fields common to all account BOs)	C1-AC-INFO (Account information)
C1-AccountBillMessage (Account Bill Message)	CI_ACI-STD (Common Account Information)
C1-AccountCurrency (Account - Get Currency Code)	CI_SYCR-AS (Account staging sync criteria)
C1-AccountMainPerson (Account - Get Main Person ID)	C1_CASH-DF (Cash Only Account)
CI_AccountCustomerInfo (Account fields common to all account BOs)	CCAL WFACCTX (Display active WF for account based on context)
CI_StopAutopayAccount (Stop Auto Pay Account)	CCAL WFACCTR (Display active WF for account based on char)
DR_Account (Data Replicator - Account)	CCAL-DECL (Highlight effective declarations for acct and prem)
ResidentialAccount (Account business object for human main customer)	F1-SYNRQALRT (Retrieve Outstanding Sync Request)
C1-MDM1Account (Account Information for MDM1 SA Sync)	COLL COND BG (Budget SA Collection Condition Algorithm)
C1-NMSAccount (Account Information for NMS Sync)	MRRCRERESAM (Create "contact CSR" account message)
	C1-CREABMCS (Create Account Bill Message From Case)
	CI_MTM_MRACV (Validate account ID sent on MR inquiry reject msg)
	CI_MTM_ENACV (Validate account ID sent on enrollment request)
	CI_CREABMFA (Create Account Bill Message From FA Remark)
	APOL-RA (Reduce Autopay Amt to the Max Withdrawal Amt)
	SECF-ACCTCC (Retrieve account's customer class)
	SECF-ACCTDIV (Retrieve account's division)

2.0 Create Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: When an account doesn't exist CSR creates Account using Account Page. Also an Account can be created automatically and linked to the Person when Person is created or updated using Person Page.

2.1 Add Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Account added or stored in CC&B. See section 1.9 Add Account.

2.2 Enter Person/s Information

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on customer request CSR can add person(s) to account. CSR enters required information using Account_Person tab on the Account_Person Page.

2.3 Add Person/s to Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Person/s are added to Account and stored in CC&B.

Entities to Configure
Person RelationshipType Bill Route Type Quote Route Type

2.4 Locate Person/s on Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Sometimes a customer will request to remove person/s from the Account. As a first step, CSR searches for person/s linked to Account.

2.5 Remove Person/s from Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on customer request CSR removes person/s from account on Account_Person Page.

2.6 Person/s Removed from Account

See **Establish Person and or Account Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Relationships between Person and Account are stopped. System remove link between Account and one of the Persons linked to the Account.

Related Training

The following User Productivity Kit 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