Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

3.4.2.1 Maintain Customer Profile

July 2012

ORACLE

Oracle Utilities Customer Care and Billing Utility Reference Model 3.4.1.2, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Maintain Customer Profile business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 3.4.2.1 Maintain Customer Profile

Process Type: Process

Parent Process: 3.4.3 Provide Customer Service

Sibling Processes:

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.

- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

Chapter 2

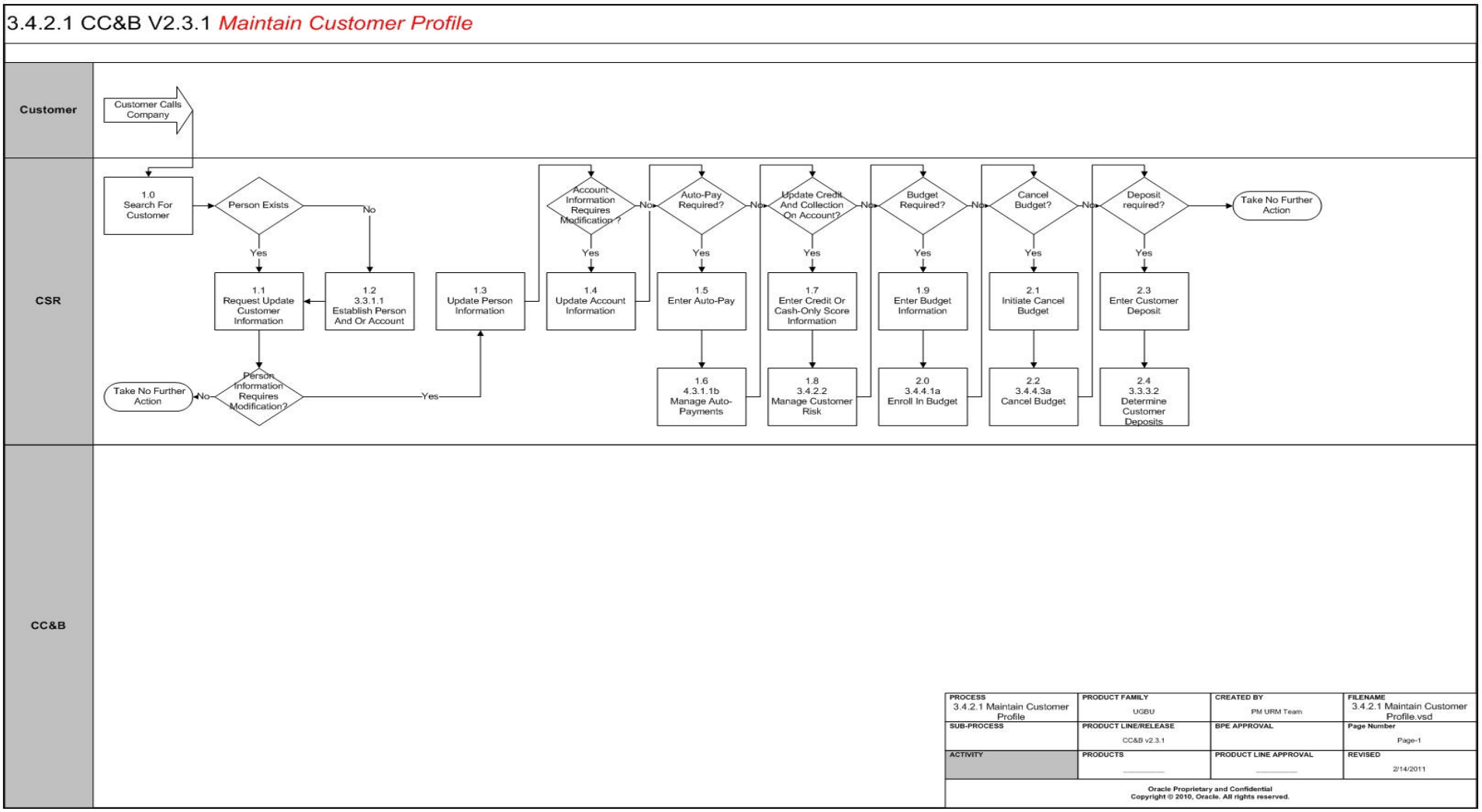
Detailed Business Process Model Description

This chapter provides a detailed description of the Maintain Customer Profile business process. This includes:

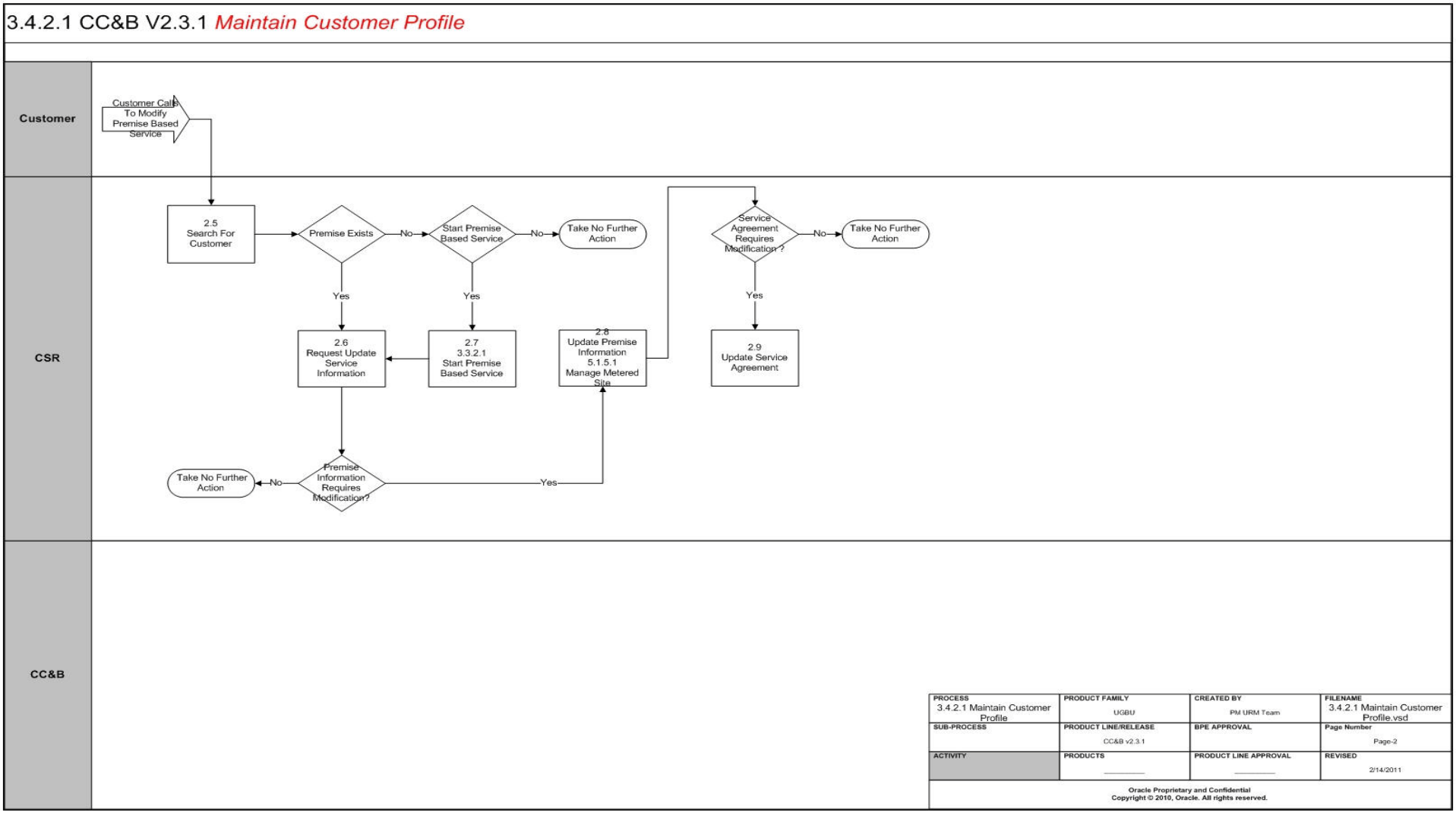
- **Business Process Diagrams**
  - **Maintain Customer Profile Page 1**
  - **Maintain Customer Profile Page 2**
  - **Maintain Customer Profile Page 3**
- **Maintain Customer Profile Description**
- **Related Training**

Business Process Diagrams

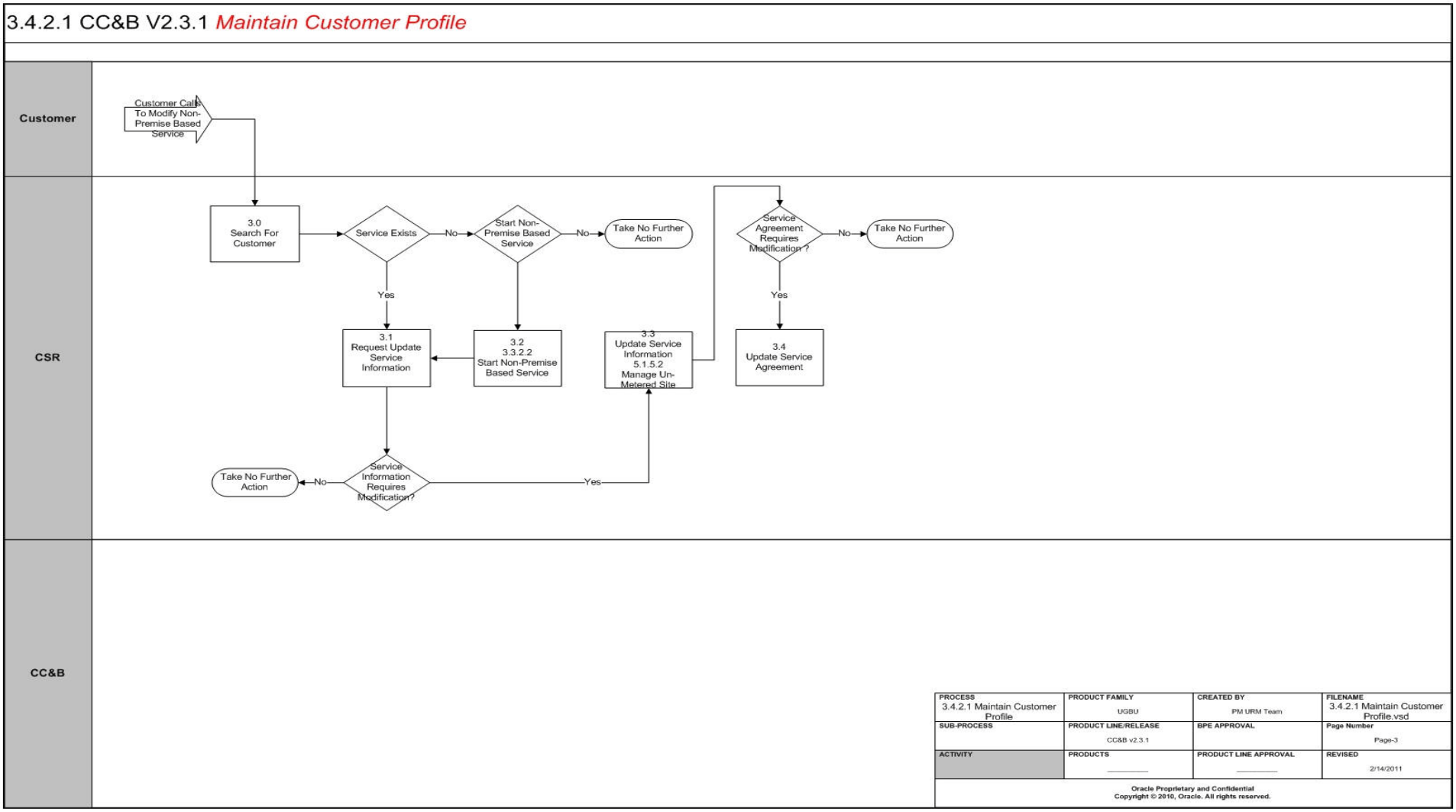
Maintain Customer Profile Page 1



Maintain Customer Profile Page 2



Maintain Customer Profile Page 3



Maintain Customer Profile Description

This section includes detailed descriptions of the steps involved in 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-pay**
- **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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

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

1.4 Update Account Information

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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-pay

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

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

1.9 Enter Budget Information

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

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

2.1 Initiate Cancel Budget

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

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

2.3 Enter Customer Deposit

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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)

See **Maintain Customer Profile Page 1** on page 2-2 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 2** on page 2-3 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 2** on page 2-3 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 2** on page 2-3 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 2** on page 2-3 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

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

3.0 Search For Customer

See **Maintain Customer Profile Page 3** on page 2-4 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 3** on page 2-4 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 3** on page 2-4 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 3** on page 2-4 for the business process diagram associated with this activity.

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

See **Maintain Customer Profile Page 3** on page 2-4 for the business process diagram associated with this activity.

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, User Tasks