Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

3.3.1.1 Establish Person and or Accounts

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Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 3.3.1.1 Establish Person and or Accounts

Contents

3.3.1.1 Establish Person and or Accounts

3.3.1.1 Establish Person and or Accounts

This section provides a description of the "Establish Person and or Accounts" business process, including:

Brief Description

Business Process: 3.3.1.1 CC&B v2.5 Establish Person and or Accounts

Process Type: Process

Parent Process: 3.3.1 CC&B v2.5 Gather and Maintain Customer Information

Sibling Processes: n/a

Typically customers call in to request service and add or remove persons from account. This process describes how persons 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:** CSR or Authorized User of the Customer Care and Billing application.

Business Process Diagrams

Establish Person and/or Account Process Model - Page 1

3.3.1.1 CC&B v2.5 *Establish Person and or Account*
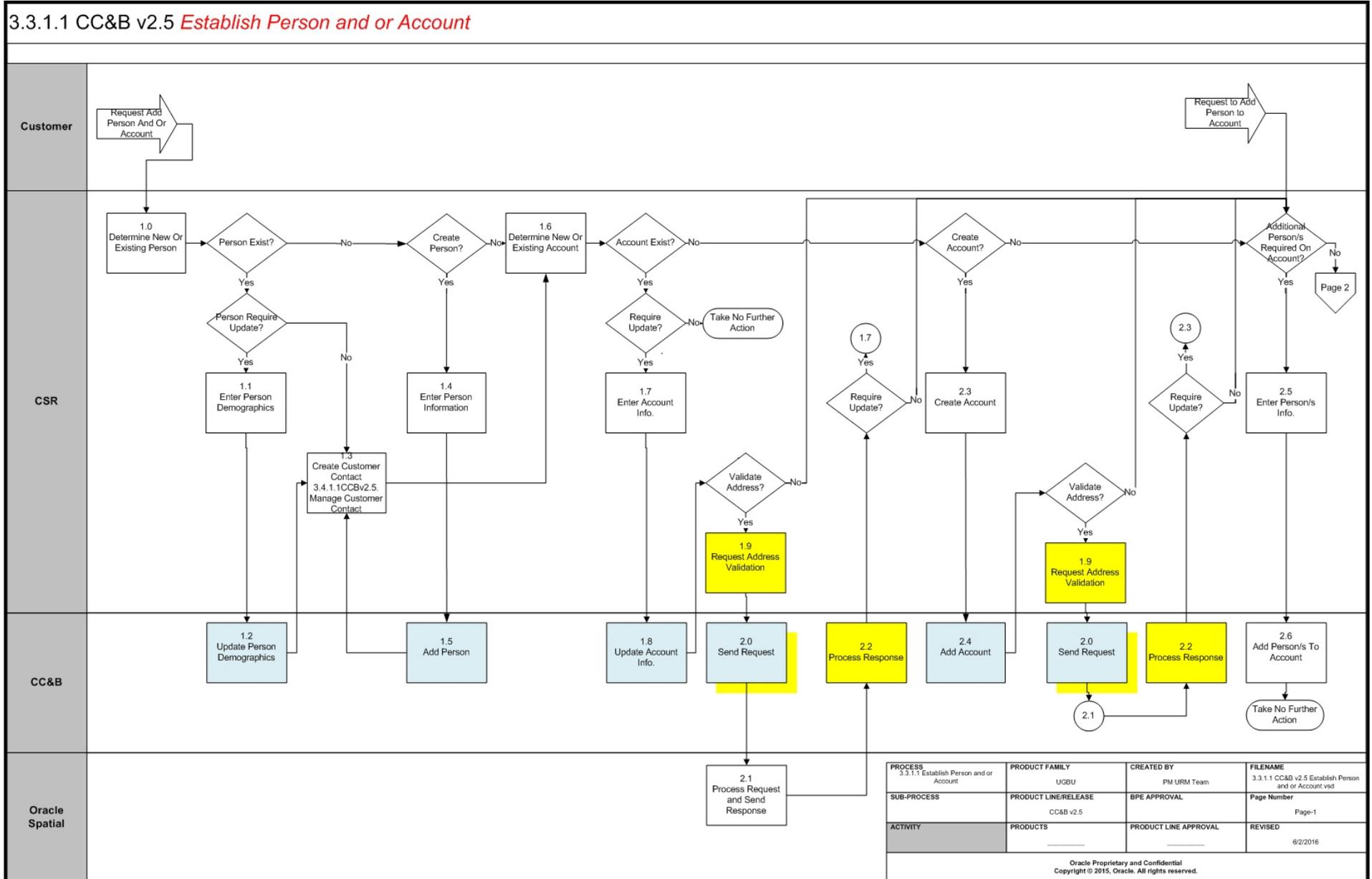
Establish Person and/or Account Process Model - Page 2

3.3.1.1 CCB v2.5 *Establish Person and or Account*
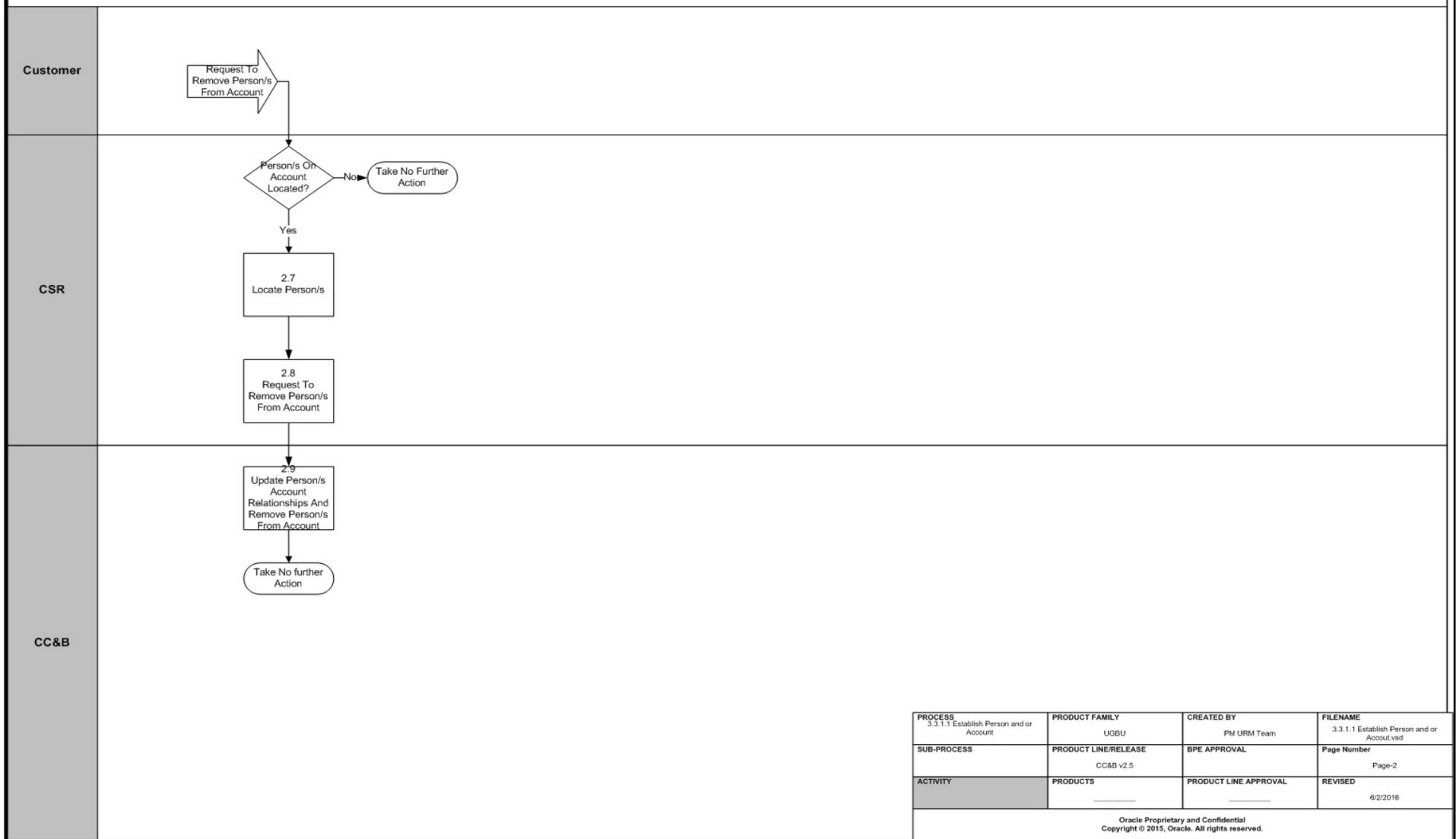
Customer	Request To Remove Person/s From Account	
CSR	Person/s On Account Located? — No → Take No Further Action Yes ↓ 2.7 Locate Person/s 2.8 Request To Remove Person/s From Account	
CC&B	2.9 Update Person/s Account Relationships And Remove Person/s From Account Take No further Action	

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.3.1.1 Establish Person and or Account	UGBU	PM URM Team	3.3.1.1 Establish Person and or Accout.vsd
SUB-PROCESS	**PRODUCT LINE/RELEASE**	**BPE APPROVAL**	**Page Number**
	CC&B v2.5		Page-2
ACTIVITY	**PRODUCTS**	**PRODUCT LINE APPROVAL**	**REVISED**
			6/2/2016

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Establish Person and or Accounts Detailed Process Model Description

This section provides a detailed description of the "Establish Person and or Accounts" business process, including:

- 1.0 Determine New or Existing Person
- 1.1 Enter Person Demographics
- 1.2 Update Person Demographics
- 1.3 Enter Customer Contact
- 1.4 Enter Person Information
- 1.5 Add Person
- 1.7 Enter Account Information
- 1.7 Enter Account Information
- 1.8 Update Account
- 2.0 Send Request
- 2.1 Process Request and Send Response
- 2.2 Process Response
- 2.3 Create Account
- 2.4 Add Account
- 2.5 Enter Persons Information
- 2.6 Add Persons to Account
- 2.7 Locate Persons on Account
- 2.8 Remove Persons from Account
- 2.9 Persons Removed from Account

1.0 Determine New or Existing Person

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

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
- C1-PersonContactDetails (Person - Get Contact Details)
- CI_PersonCustomerInfo (Person Details for Customer Info)
- Human (Person business object for human)
- Person (Person fields common to all person BOs)
- C1-MDM1Person (Person Information for MDM1 SA Sync)
- C1-NMSPerson (Person Information for NMS Sync)
- C1-CustomerMaintenancePerson (Siebel Person Customer Maintenance)
- C1-MDM2Person (MDM2 Person)
- CI_MDM2Business (MDM2 Business)
- CI_MDM2Person (MDM2 Person)
- WX-Person (Person)
- CI_CreateDemoPerson (Demo Data Creation - Add Person)

Available Algorithms
- CI_PER-NM-VL LAST,FIRST (Person's name should be Last, First)
- CI_PHNFMT_NA (North American phone format)
- ADHV-PHN (Validates phone numbers in a variety of formats)
- CI_ADHVPHNUS (Validates phone numbers in North American format)
- CI_ADHVPHNUK (Validates phone numbers in UK format)

1.3 Enter Customer Contact

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User enters customer contact information to keep records on Customer Contact Page. Refer to 3.4.1.1 CC&B v2.5 Manage Customer Contacts.

1.4 Enter Person Information

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

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.

1.5 Add Person

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: Person is added and stored to the system on Person Page. Refer to section 1.2 CC&B v2.5 Update Person Demographics for configuration, algorithm and business object information.

1.6 Determine New or Existing Account

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

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.

1.7 Enter Account Information

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

Description: If account exists, but requires update, enter account information on the Account 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).

1.8 Update Account

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR, CC&B

Description: Account information is updated on Account Page.

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

- C1-PersonContactDetails (Person - Get Contact Details)
- CI_PersonCustomerInfo (Person Details for Customer Info)
- Human (Person business object for human)
- Person (Person fields common to all person BOs)
- C1-MDM1Person (Person Information for MDM1 SA Sync)
- C1-NMSPerson (Person Information for NMS Sync)
- C1-CustomerMaintenancePerson (Siebel Person Customer Maintenance)
- C1-MDM2Person (MDM2 Person)
- CI_MDM2Business (MDM2 Business)
- CI_MDM2Person (MDM2 Person)
- WX-Person (Person)
- CI_CreateDemoPerson (Demo Data Creation - Add Person)

Available Algorithms

- CI_ACCT-INFO (Account information)
- CI_SYCR-AS (Account staging sync criteria)
- C1_CASH-DF (Cash Only Account)
- F1-SYNRQALRT (Retrieve Outstanding Sync Request)
- CI_MRRCREAM (Create "contact CSR" account message)
- CI-CREABMCS (Create Account Bill Message From Case)
- CI_CREABMFA (Create Account Bill Message From FA Remark)
- C1-APOL-RA (Reduce Autopay Amt to the Max Withdrawal Amt)
- CI_SC-ACCTCC (Retrieve account's customer class)
- C1-CRRT-BA (Retrieve account's bill after date)

1.9 Request Address Validation

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

Description: If address requires validation, the CSR or Authorized User requests it from the Account/Person Page.

2.0 Send Request

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CCB

Description: CCB initiates a request to Oracle Spatial to verify the address.

Entities to Configure
- Installation Options - Framework
- General System Configuration - Feature Configuration
- Script

Available Algorithms
- F1-ORAGEOCD - Oracle Spatial Geocoding. This algorithm works with script C1-ValAddr. Plug it in to validate an address using Oracle Spatial procedures.

2.1 Process Request and Send Response

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Oracle Spatial

Description: Oracle Spatial receives and process the request. The return code will identify the match quality (where 1 is perfect match).

2.2 Process Response

Reference: Establish Person and/or Account Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CCB

Description: CCB shows a message accordingly to the return code.

2.3 Create Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

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.

2.4 Add Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Account added or stored in CC&B. Refer to section 1.9 CC&B v2.5 Add Account.

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

- Account (Account fields common to all account BOs)
- C1-AccountBillMessage (Account Bill Message)
- C1-AccountCurrency (Account - Get Currency Code)
- C1-AccountMainPerson (Account - Get Main Person ID)
- CI_AccountCustomerInfo (Account fields common to all account BOs)
- CI_StopAutopayAccount (Stop Auto Pay Account)
- C1-MDM1Account (Account Information for MDM1 SA Sync)
- C1-NMSAccount (Account Information for NMS Sync)
- C1-AccountCreditReviewSchedule (Account Credit Review Schedule)
- C1-AccountManagementAccount (Account - Account Management)
- C1-CustomerMaintenanceAccount (Siebel Account Customer Maintenance)
- C1-MDM2Account (MDM2 Account)
- CI_AccountBillCycle (Account - Get Bill Cycle)
- CI_AccountSecuredFields (Field Level Security - Account)

Available Algorithms

- CI_ACCT-INFO(Account information)
- CI_ACCT-INFO(Common Account Information)
- CI_SYCR-AS (Account staging sync criteria)
- CI_SYCR-AS(Cash Only Account)
- CI_WFA-CTXT(Display active WF for account based on context)
- CI_CCAL_DECL(Highlight effective declarations for acct and prem)
- F1-SYNRQALRT (Retrieve Outstanding Sync Request)
- CI-CREABMCS (Create Account Bill Message From Case)
- C1-APOL-RA (Reduce Autopay Amt to the Max Withdrawal Amt)
- CI_SECF-ACCTCC (Retrieve account's customer class)

2.5 Enter Persons Information

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CSR

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

2.6 Add Persons to Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Persons are added to Account and stored in CC&B.

Entities to Configure
- Person RelationshipType
- Bill Route Type
- Quote Route Type

2.7 Locate Persons on Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CSR

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

2.8 Remove Persons from Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on customer request CSR removes persons from account on Account_Person Page.

2.9 Persons Removed from Account

Reference: Establish Person and/or Account Process Model - Page 2 on page 4 for the associated business process diagram.

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
- 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