



CCS

C2M.v2.7.CCB

3.3.1.1a Establish Person and or Accounts for Customer Service Request

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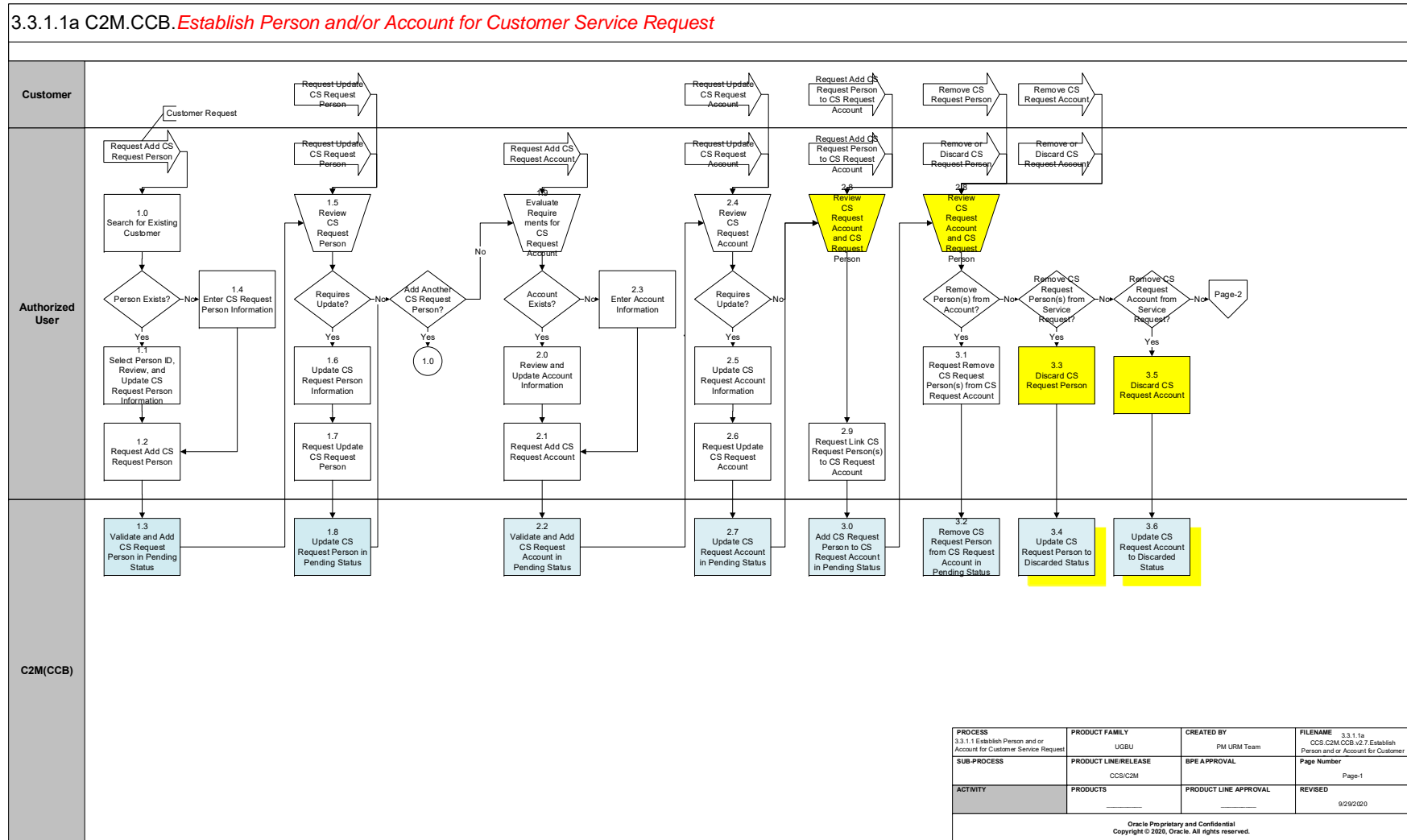
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Brief Description

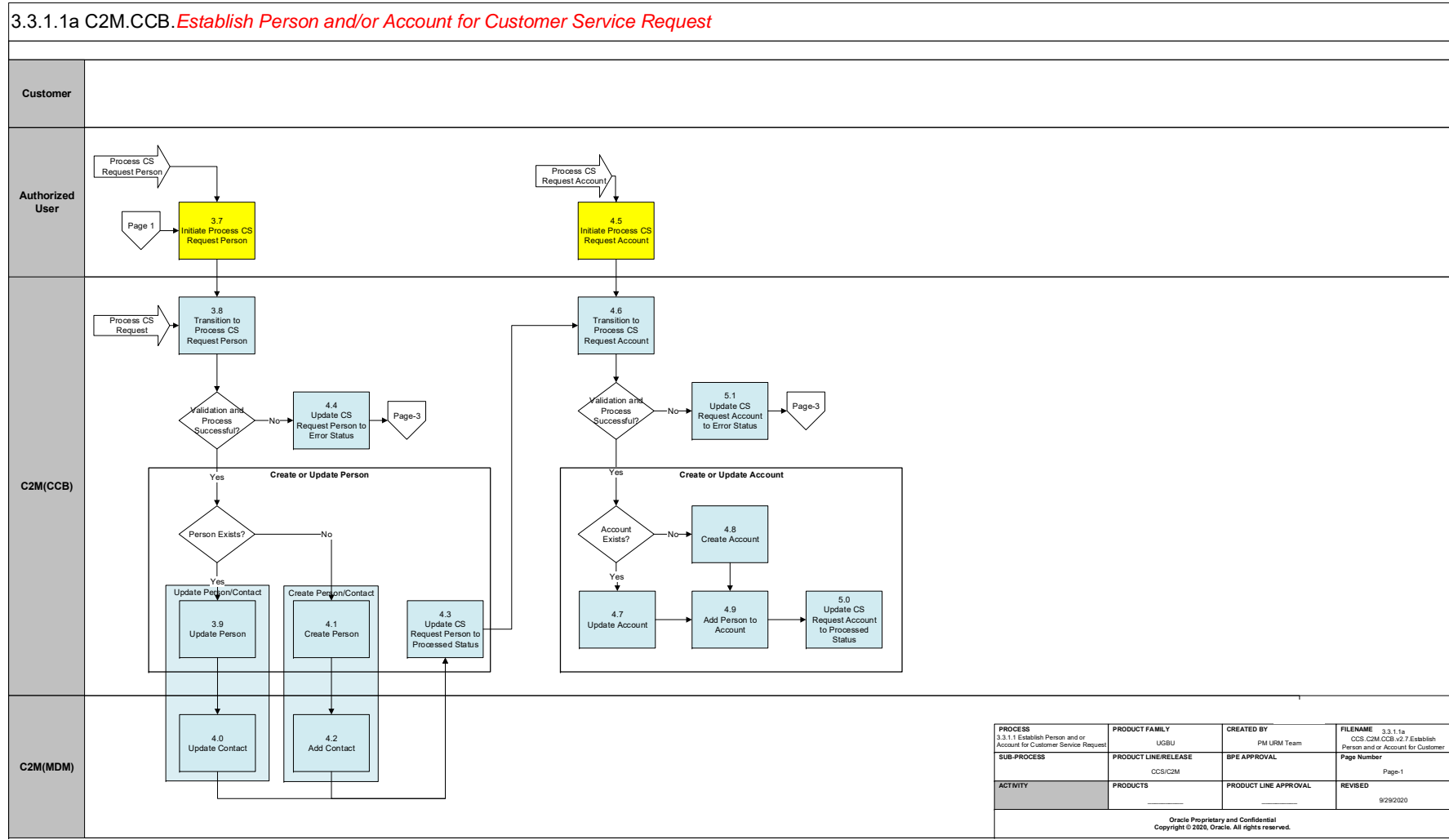
Business Process: 3.3.1.1 C2M.CCB.Establish CS Request Person and or Account
Process Type: Sub-Process
Parent Process: 3.3.1 C2M.CCB.Gather and Maintain Customer Information
Sibling Processes: 3.3.2.1a C2M.CCB.Start Premise-Based Service Using Customer Service Request

This business process takes place when customers contacts the Service Provider to request service or make changes to previously created service request. As a part of Customer Service Request processing business requires create and maintain person(s) and account(s) information associated with each Customer Service Request. This process also depicts transition to person(s) and account(s) entities required for active service. An authorized business users usually initiate this process, evaluate requirements for Person(s) and Account(s) information and make necessary changes if required.

Business Process Model Page 1

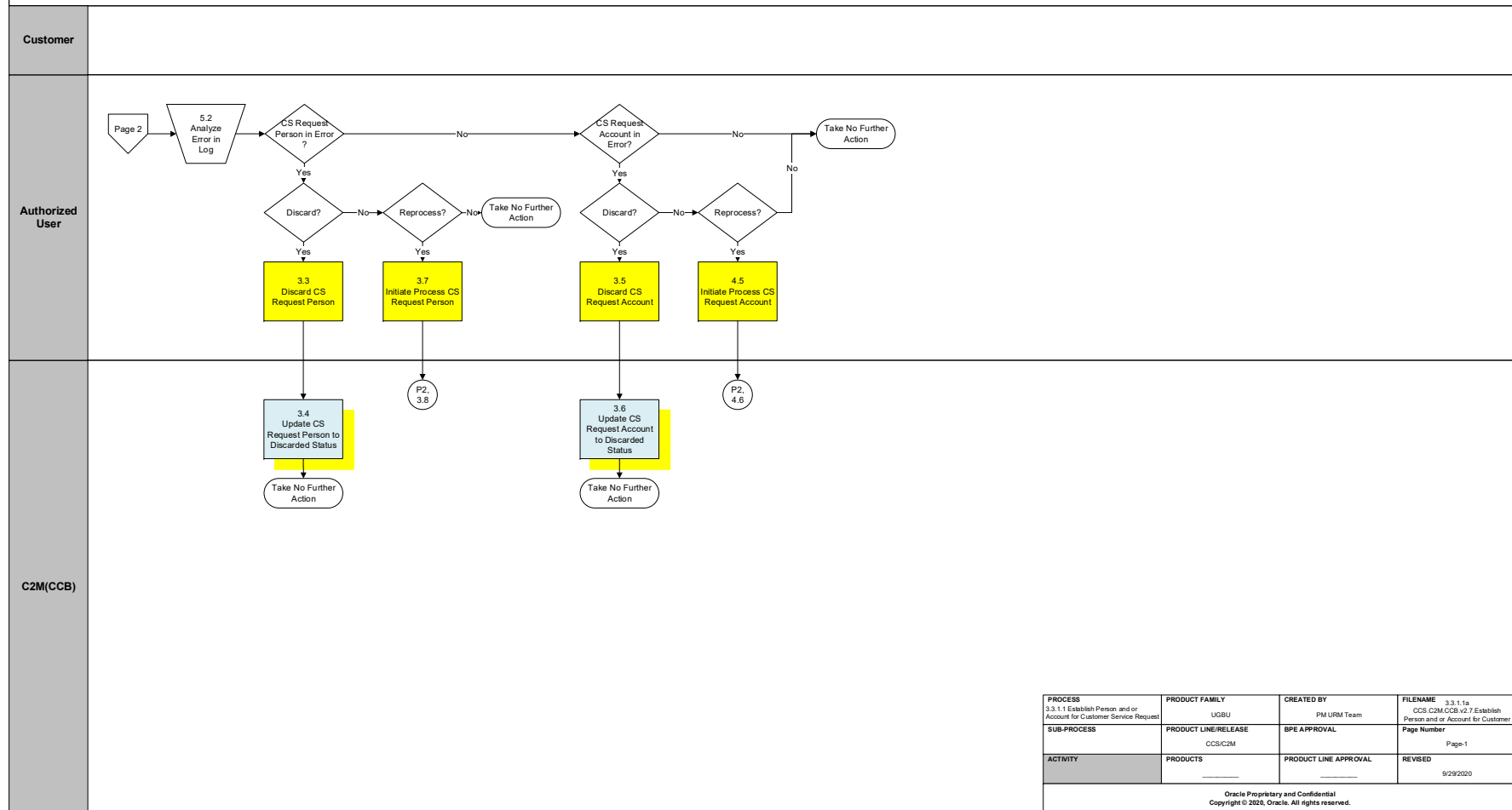


Business Process Model Page 2



Business Process Model Page 3

3.3.1.1a C2M.CCB. *Establish Person and/or Account for Customer Service Request. Exception Processing*



PROCESS 3.3.1.1 Establish Person and or Account for Customer Service Request	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.1.1a CCS C2M CCB v2.7 Establish Person and or Account for Customer
SUB-PROCESS	PRODUCT LINE/RELEASE CCS/C2M	BPE APPROVAL	Page Number Page-1
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 9/29/2020
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Detail Business Process Model Description

1.0 Search for Existing Customer

Actor/Role: Authorized User

Description:

At first the Authorized User determines whether they need to create a new person or if the person exists by searching using the Person Search on [Customer Service Request Person Page](#). The Authorized User is responsible for fulfilling customer requests.

1.1 Select Person ID, Review, and Update CS Request Person Information

Actor/Role: Authorized User

Description:

If the Person information requires updating, the Authorized User will update the information on the [Customer Service Request Person Page](#).

1.2 Request Add CS Request Person

Actor/Role: Authorized User

Description:

After updating or entering person information, the Authorized User requests to add the Customer Service Request Person from the [Customer Service Request Person Page](#).

1.3 Validate and Add CS Request Person in Pending Status

Actor/Role: C2M(CCB)

Description:

The Customer Service Request Person is added in C2M(CCB).

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

C1-VALPERCR Validate Contract Request - Basic Person
C1-CPERINFO Customer Service Request Person Information String
C1-PERACTFLG Add/Update Person Action Flag
C1-VALCSRPER Validate Contract Change Request Person Action

Configuration Required: Y **Entities to Configure:**

Customer Service Request Type

Business Objects: Y

Business Objects:

C1-ContractChangeReqPersonRoot (Contract Change Request Person Root)
C1-ContractChangeReqPersnBasic (Contract Change Request Person Basic)

Process Scripts: Y

Script:

C1-AddCSRLog Contract Change Request Person - Add User Log Entry - BPA Script
C1-CSRMontrSS Customer Change Request Monitor Routine
C1-CSSReqTD Create Customer Request Notification To Do Entry
C1-NCPCSRCre New Customer Process CS Request Creation
C1-CustMtReq (Customer Maintenance Request)

Inbound Service:

C1-AddCoChRe (Add Contract Change Request)
--

Application Service:

C1-BCSREQPERBOAS
C1-CSREQPERBOAS

1.4 Enter CS Request Person Information

Actor/Role: Authorized User

Description:

If the customer does not exist, the Person information is entered using [Customer Service Request Person Page](#). The Authorized User populates Person related information: checks if the is a person or business, whether person has life support or sensitive load equipment, person’s name(s), person phone number(s), person IDs etc.

1.5 Review CS Request Person

Actor/Role: Authorized User

Description:

If the Customer Service Request Person data requires updating, the Authorized User navigates to the [Customer Service Request Person Page](#) to update the desired information.

1.6 Update CS Request Person Information

Actor/Role: Authorized User

Description:

The Customer Service Request Person information is updated on the [Customer Service Request Person Page](#).

1.7 Request Update CS Request Person

Actor/Role: Authorized User

Description:

The Authorized User requests to update the Customer Service Request Person information from the [Customer Service Request Person Page](#).

1.8 Update CS Request Person in Pending Status

Actor/Role: C2M(CCB)

Description:

The Pending Customer Service Request Person information is updated in application

Process Plug-in enabled: Y	Available Algorithm(s):	<table border="1"> <tr><td>C1-VALPERCR Validate Contract Request - Basic Person</td></tr> <tr><td>C1-CPERINFO Customer Service Request Person Information String</td></tr> <tr><td>C1-PERACTFLG Add/Update Person Action Flag</td></tr> <tr><td>C1-VALCSRPER Validate Contract Change Request Person Action</td></tr> </table>	C1-VALPERCR Validate Contract Request - Basic Person	C1-CPERINFO Customer Service Request Person Information String	C1-PERACTFLG Add/Update Person Action Flag	C1-VALCSRPER Validate Contract Change Request Person Action
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C1-VALCSRPER Validate Contract Change Request Person Action						
Configuration Required: Y	Entities to Configure:	<table border="1"> <tr><td>Customer Service Request Type</td></tr> </table>	Customer Service Request Type			
Customer Service Request Type						
Business Objects: Y	Business Objects:	<table border="1"> <tr><td>C1-ContractChangeReqPersonRoot (Contract Change Request Person Root)</td></tr> <tr><td>C1-ContractChangeReqPersnBasic (Contract Change Request Person Basic)</td></tr> </table>	C1-ContractChangeReqPersonRoot (Contract Change Request Person Root)	C1-ContractChangeReqPersnBasic (Contract Change Request Person Basic)		
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C1-CSSReqTD Create Customer Request Notification To Do Entry						

C1-NCPCSRCre New Customer Process CS Request Creation
C1-CustMtReq (Customer Maintenance Request)

Inbound Service:

C1-AddCoChRe (Add Contract Change Request)
--

Application Service:

C1-BCSREQPERBOAS
C1-CSREQPERBOAS

1.9 Evaluate Requirements for CS Request Account

Actor/Role: Authorized User

Description:

If there is a need to add or update Customer Service Request Account, the Authorized User navigates to [Customer Service Request Account Page](#) via the Customer Request Page.

2.0 Review and Update Account Information

Actor/Role: Authorized User

Description:

If an account exists, but requires an update, the Authorized User searches for the Account using the Account Search on the [Customer Service Request Account Page](#) and selects the existing Account. The Authorized User updates the account information on the [Customer Service Request Account Page](#). The Account Information string could be displayed differently based on Authorized User needs (The Main Account Info string could be configured for display to contain different info).

2.1 Request Add CS Request Account

Actor/Role: Authorized User

Description:

After updating or entering the Account information, the Authorized User requests to add the Customer Service Request Account from the [Customer Service Request Account Page](#).

2.2 Validate and Add CS Request Account in Pending Status

Actor/Role: C2M(CCB)

Description:

The Customer Service Request Account is added in application in Pending status.

C1-CACCTINFO (Customer Service Request Account Information)

Process Plug-in enabled: Y

Available Algorithm(s):

C1-ACCACTFLG (Add/Update Account Action Flag)
C1-VALCSRACT (Validate Contract Change Request Account Action)
C1-ADDUPDACT (Add or Update Account for a CS Request Account)
C1-VALACCTCR (Validate Contract Request - Basic Account)

Configuration required: Y

Entities to Configure:

Refer to configuration entities defined under 4.8 Create Account
--

Business Objects: Y

Business Objects:

C1-ContractChngeReqAccountRoot
C1-ContractChngeReqAcntBasic
C1-AccountPerson (Account - Account/Person)
C1-AccountMainPerson (Account - Get Main Person ID)
C1-AccountBillMessage (Account Bill Message)
C1-AccountCurrency (Account - Get Currency Code)
C1-AccountCreditReviewSchedule (Account Credit Review Schedule)
CI_AccountCustomerInfo (Account fields common to all account BOs)
CI_StopAutopayAccount (Stop Auto Pay Account)
WX-RetAcctRelType (Retrieve Account Relationship Type Description)

Process Scripts: Y

Script:

C1-CAcctLog (Contract Change Request Account - Add User Log Entry)
C1-CAcctMain (Contract Change Request Account Root - Maintain)
C1-VALACCTCR (Validate Contract Request - BasicAccount)
C1-VALCSRACT (Validate Contract Change Request Account Action)

2.3 Enter Account Information

Actor/Role: Authorized User

Description:

If the account does not exist, the account information is entered by the Authorized User on the [Customer Service Request Account Page](#).

2.4 Review CS Request Account

Actor/Role: Authorized User

Description:

The Authorized User reviews the information provided on the [Customer Service Request Account Page](#) and determines if the Account information requires an update.

2.5 Update CS Request Account Information

Actor/Role: Authorized User

Description:

If the Account information requires an update the Authorized User updates the Account information using [Customer Service Request Account Page](#). An update can be made if the record is in a Pending or Error status.

2.6 Request Update CS Request Account

Actor/Role: Authorized User

Description:

The Authorized User requests to update the Customer Service Request Account data from the [Customer Service Request Account Page](#).

2.7 Update CS Request Account in Pending Status

Actor/Role: C2M(CCB)

Description:

The Pending Customer Service Request Account information is updated in C2M (CCB).

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

C1-CACCTINFO (Customer Service Request Account Information)
C1-ACCACTFLG (Add/Update Account Action Flag)
C1-VALCSRACT (Validate Contract Change Request Account Action)
C1-ADDUPDACT (Add or Update Account for a CS Request Account)
C1-VALACCTCR (Validate Contract Request - Basic Account)

Business Objects: Y

Business Objects:

C1-ContractChngeReqAccountRoot
C1-ContractChngeReqAcntBasic
C1-AccountPerson (Account - Account/Person)
C1-AccountMainPerson (Account - Get Main Person ID)
C1-AccountBillMessage (Account Bill Message)
C1-AccountCurrency (Account - Get Currency Code)
C1-AccountCreditReviewSchedule (Account Credit Review Schedule)
CI_AccountCustomerInfo (Account fields common to all account BOs)
CI_StopAutopayAccount (Stop Auto Pay Account)
WX-RetAcctRelType (Retrieve Account Relationship Type Description)

Process Scripts: Y

Script:

C1-CAcctLog (Contract Change Request Account - Add User Log Entry)
C1-CAcctMain (Contract Change Request Account Root - Maintain)
C1-VALACCTCR (Validate Contract Request - BasicAccount)
C1-VALCSRACT (Validate Contract Change Request Account Action)

2.8 Review Account and Person(s)

Actor/Role: Authorized User

Description:

The Authorized User makes sure that all the information regarding the Customer Service Request Account, Customer Service Request Person(s) are valid and have not raised any error flags. Authorized User reviews Customer Service Request Person using the Customer Service Request Person Page and Customer Service Request Account using the [Customer Service Request Account Page](#).

2.9 Request Link CS Request Person(s) to CS Request Account

Actor/Role: Authorized User

Description:

The Authorized User links the Customer ServiceRequest Person to the Customer Service Request Account using the [Customer Service Request Account Page](#).

3.0 Add CS Request Person to CS Request Account in Pending Status

Actor/Role: C2M(CCB)

Description:

The Pending Customer Service Request Account information is updated in C2M (CCB) with an additional person.

3.1 Request Remove CS Request Person(s) from CS Request Account

Actor/Role: Authorized User

Description:

The Authorized User removes the Customer Service Request Person from the Customer Service Request Account using the [Customer Service Request Account Page](#).

3.2 Remove CS Request Person from CS Request Account in Pending Status

Actor/Role: C2M(CCB)

Description:

The Pending Customer Service Request Account information is updated in C2M (CCB) by removing a linked person.

3.3 Discard CS Request Person

Actor/Role: Authorized User

Description:

An Authorized User discards the CS Request Person using the [Customer Service Request Person Page](#).

3.4 Update CS Request Person to Discarded Status

Actor/Role: C2M(CCB)

Description:

The Customer Service Request Person is updated to a Discarded Status.

3.5 Discard CS Request Account

Actor/Role: Authorized User

Description:

An Authorized User discards the Customer Service Request Account using the [Customer Service Request Account Page](#).

3.6 Update CS Request Account to Discarded Status

Actor/Role: C2M(CCB)

Description

The Customer Service Request Account is updated to a Discarded Status.

3.7 Initiate Process CS Request Person

Actor/Role: Authorized User

Description:

An Authorized User processes the Customer Service Person using the [Customer Service Request Person Page](#).

3.8 Transition to Process CS Request Person

Actor/Role: C2M(CCB)

Description

The Customer Service Request Person transitions to an interim Process State.

3.9 Update Person

Actor/Role: C2M(CCB)

Description

If the Person already exists, the Person record is updated in C2M(CCB).

4.0 Update Contact

Actor/Role: C2M(MDM)

Description

C2M uses Internal Synchronization process to update Contact Demographics in C2M(MDM). The Internal Synchronization process is performed in a single transaction. A Pre-processing Algorithm uses Extendable Lookups to translate between Oracle Utilities CCB codes and Oracle Utilities MDM codes.

4.1 Create Person

Actor/Role: C2M(CCB)

Description

If the Person does not exist, the Person is created in C2M(CCB).

4.2 Add Contact

Actor/Role: C2M(MDM)

Description

C2M uses Internal Synchronization process to update Contact information in C2M(MDM). The Internal Synchronization process is performed in a single transaction. A Pre-processing Algorithm uses Extendable Lookups to translate between Oracle Utilities CCB codes and Oracle Utilities MDM codes.

4.3 Update CS Request Person to Processed Status

Actor/Role: C2M(CCB)

Description

The Customer Service Request Person is updated to a Processed Status.

4.4 Update CS Request Person to Error Status

Actor/Role: C2M(CCB)

Description

The Customer Service Request Person is updated to an Error Status.

4.5 Initiate Process CS Request Account

Actor/Role: Authorized User

Description:

An Authorized User processes the Customer Service Account using the [Customer Service Request Account Page](#).

4.6 Transition to Process CS Request Account

Actor/Role: C2M(CCB)

Description

The Customer Service Request Account transitions to an interim Process State.

4.7 Update Account

Actor/Role: C2M(CCB)

Description

If the Account already exists, the Account record is updated in C2M(CCB).

4.8 Create Account

Actor/Role: C2M(CCB)

Description

If the Account does not exist, the Account is created in C2M(CCB).

Configuration required: Y

Entities to Configure:

Installation Options - Account
Installation Options-Framework – Account Information
Installation Options-Framework – Control Central Alert
Access Group
Account Management Group
Account Relationship Type
Auto Pay Source Type
Bill Cycle
Bill Message
Collection Class
Collection Class Control
Communication Type
Customer Contact Class
Currency
Person Relationship Type
User

4.9 Add Person to Account

Actor/Role: C2M(CCB)

Description

The Person record is added in the Account record in C2M(CCB).

5.0 Update CS Request Account to Processed Status

Actor/Role: C2M(CCB)

Description

The Customer Service Request Account is updated to a Processed Status.

5.1 Update CS Request Account to Error Status

Actor/Role: C2M(CCB)

Description

The Customer Service Request Account is updated to an Error Status.

5.2 Analyze Error in Log

Actor/Role: Authorized User

Description

An Authorized User analyzes the Customer Service Request Account Error Log. If the user can fix the issue, the user will make the necessary corrections and then proceed with Request Process. If the error cannot be resolved, the user may proceed to Discard this record.

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
06/10/2020	Anosh Mehdi	Initial draft	
07/06/2020	Anosh Mehdi		Various updates
07/10/2020	Angus MacKenzie		Review, comments
07/13/2020	Jeremy Quan		Review, updates
08/29/2020	Galina Polonsky		Reviewed, Approved

Attachments

Customer Service Request Person Page



ContractChangeRequ
estPerson.docx

Customer Service Request Account Page



ContractChangeRequ
estAccount.docx