3.4.1.1 Manage Customer Contacts
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRIEF DESCRIPTION</td>
<td>4</td>
</tr>
<tr>
<td>BUSINESS PROCESS MODEL PAGE-1</td>
<td>5</td>
</tr>
<tr>
<td>BUSINESS PROCESS MODEL PAGE-2</td>
<td>6</td>
</tr>
<tr>
<td>DETAIL BUSINESS PROCESS MODEL DESCRIPTION</td>
<td>7</td>
</tr>
<tr>
<td>TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS</td>
<td>16</td>
</tr>
<tr>
<td>DOCUMENT CONTROL</td>
<td>17</td>
</tr>
<tr>
<td>ATTACHMENTS</td>
<td>18</td>
</tr>
<tr>
<td>Customer Contact Page</td>
<td>18</td>
</tr>
<tr>
<td>Customer Contact Log Entry Page</td>
<td>18</td>
</tr>
<tr>
<td>Customer Contact Characteristic Page</td>
<td>18</td>
</tr>
<tr>
<td>Customer Contact Methods</td>
<td>18</td>
</tr>
</tbody>
</table>
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.
3.4.1.1 C2M.v2.7.CCB Manage Customer Contacts

**Outbound Customer Contacts**

C2M(CCB)

CSR or Authorized User

External Automated Phone System

Oracle BPEL

**Examples:**
- Orders
- Collections Events
- Deposit Review

**C2M(CCB)**

**Document Management Software**

- 2.7 Print and Send Letter
- 2.6 Schedule Letters
- 2.5 Receive Letter
- 3.1 Dial Customer
- 3.2 Dispatch Message
- 3.3 Generate Request
- 3.4 Create and Send SMS
- 3.5 Create and Send Email
- 3.6 Receive Email
- 3.7 Receive Call
- 3.8 Receive Message
- 3.9 Dial Phone
- 3.10 Take No Further Action

**Examples:**
- Charge
- Collections Events
- Deposit Review

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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):
Configuration required Y  Entities to Configure:
Business Object Y  Business Object:

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 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):

<table>
<thead>
<tr>
<th>Algorithm(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1-TDT-INFO - To Do Information (To Do Type)</td>
</tr>
<tr>
<td>F1-TDI-INFO - To Do Information (Installation)</td>
</tr>
<tr>
<td>F1-VAL-SKILL - Validate Skills: E (Error) or W (Warning)</td>
</tr>
<tr>
<td>CCAL-TD – Highlight outstanding to do entries</td>
</tr>
</tbody>
</table>

Configuration required Y  Entities to Configure:

<table>
<thead>
<tr>
<th>Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Do Role</td>
</tr>
<tr>
<td>To Do Type</td>
</tr>
</tbody>
</table>

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.
### 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.

---

- 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):**

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

### Configuration required Y

**Entities to Configure:**

<table>
<thead>
<tr>
<th>Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIS Division</td>
</tr>
<tr>
<td>Customer Contact Class</td>
</tr>
<tr>
<td>Customer Contact Type</td>
</tr>
<tr>
<td>Customer Contact Characteristic Type</td>
</tr>
<tr>
<td>Navigation Option</td>
</tr>
<tr>
<td>Meter Reader Remark</td>
</tr>
<tr>
<td>Field Activity Type</td>
</tr>
<tr>
<td>Field Activity Remark</td>
</tr>
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</table>
### Business Object Y

**Business Object:**

<table>
<thead>
<tr>
<th>C1-CreateCustomerContact</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-CreateCustContactTaskType</td>
</tr>
<tr>
<td>C1-LeadEvtTypeCreCCAbtInitv</td>
</tr>
<tr>
<td>C1-ExpireCreditCardCustContact</td>
</tr>
<tr>
<td>C1-CreateCustomerContactTask</td>
</tr>
<tr>
<td>C2M-CreateAdjCustomerContact</td>
</tr>
<tr>
<td>C1-FWCustomerContact</td>
</tr>
</tbody>
</table>

### Process Scripts

**Scripts:**

<table>
<thead>
<tr>
<th>C1-CreCustCn - Create Customer Contact (Plugin Script)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-CreCsCt - Create Customer Contact (Service Script)</td>
</tr>
<tr>
<td>C1-CreateCC - Create Customer Contact Task (Service Script)</td>
</tr>
<tr>
<td>C1-LdEvTyCCV - Create Customer Contact Event Type Validation</td>
</tr>
<tr>
<td>C1-LECCreCC - Create Lead Customer Contact</td>
</tr>
</tbody>
</table>
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:
- C1_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.
3.4.1.1 C2M.v2.7.CCB Manage Customer Contacts

**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.

<table>
<thead>
<tr>
<th>Process Plug-in enabled</th>
<th>Configuration required</th>
<th>Entities to Configure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Y</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Process Scripts</th>
<th>Script(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>C1-SmsSend (Send SMS Message)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Entities to Configure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature Configuration – External Messages</td>
</tr>
<tr>
<td>Outbound Message Type</td>
</tr>
<tr>
<td>External System</td>
</tr>
<tr>
<td>Message Sender</td>
</tr>
</tbody>
</table>

### Configuration required Y

<table>
<thead>
<tr>
<th>Script(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-EmailSvc (Send Email)</td>
</tr>
</tbody>
</table>

### 3.6 Receive Email

**Actor/Role:** Customer

**Description:**
The customer receives an Email from the company.
# Test Documentation related to the Current Process

<table>
<thead>
<tr>
<th>ID</th>
<th>Document Name</th>
<th>Test Type</th>
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</thead>
<tbody>
<tr>
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</tbody>
</table>
## Document Control

### Change Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/11/2017</td>
<td>Kashif Q. Qureshi</td>
<td>Draft</td>
<td>Updated for C2M</td>
</tr>
<tr>
<td>8/18/2017</td>
<td>Kashif Q. Qureshi</td>
<td>Final Draft</td>
<td></td>
</tr>
<tr>
<td>09/20/2017</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>06/03/2019</td>
<td>Satya Kalavala</td>
<td></td>
<td>Updated format for v2.7</td>
</tr>
</tbody>
</table>
Attachments

Customer Contact Page

Customer Contact Log Entry Page

Customer Contact Characteristic Page

Customer Contact Methods