C2M.v2.7.CC~~&~~B ~~v2.6~~

3.4.2.1 CC&B Maintain Customer Profile

Creation Date: April 27, 2009

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ORACLE

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Brief Description

Business Process: **3.4.2.1 C2M.CCB Maintain Customer Profile**
Process Type: **Sub-Process**
Parent Process: **3.4.3 C2M.CCB Provide Customer Service**
Sibling Processes:

This process describes typical scenarios regarding how the system allows the Company to store and update customer profiles.

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Business Process Model Page 1

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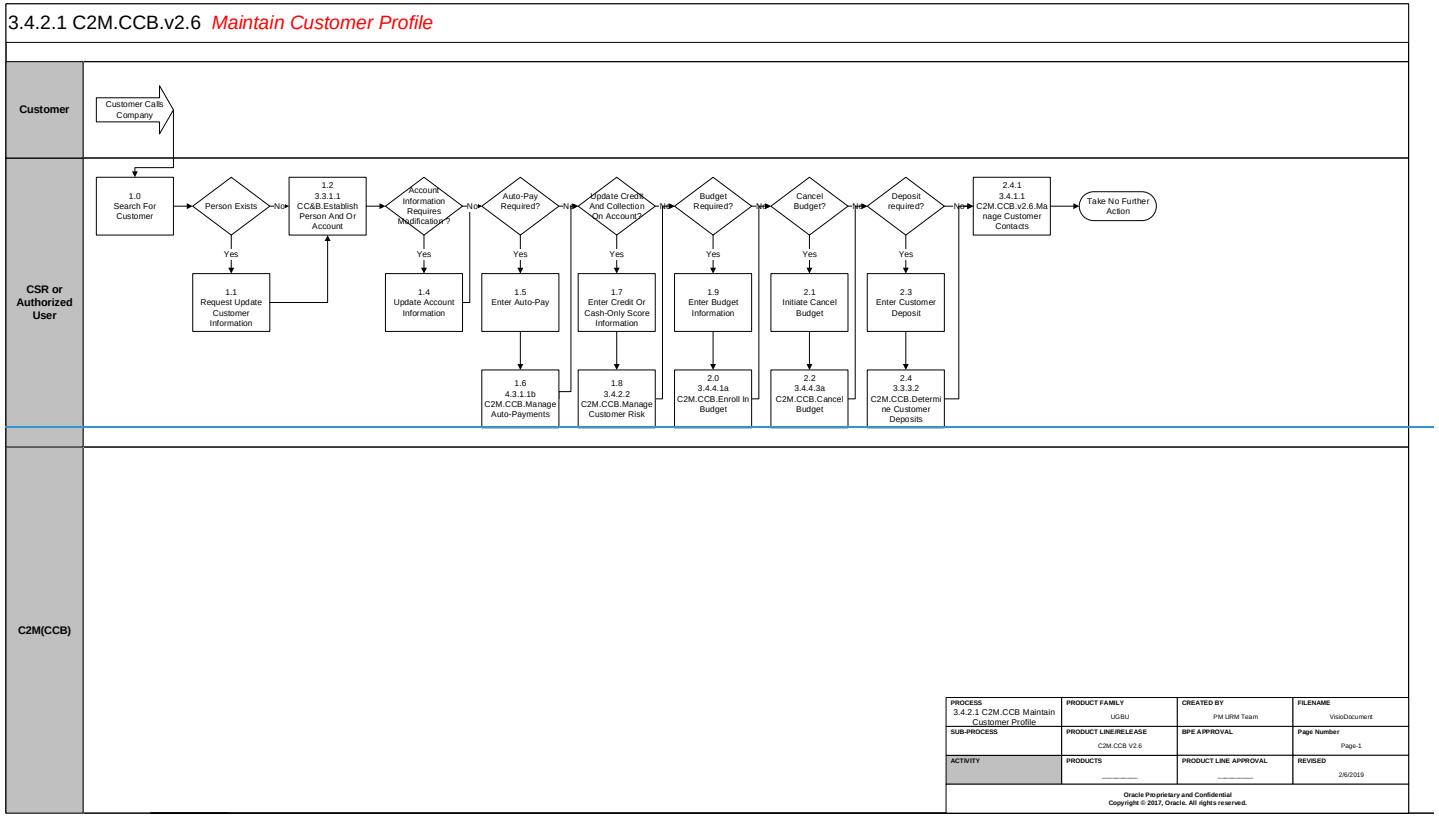

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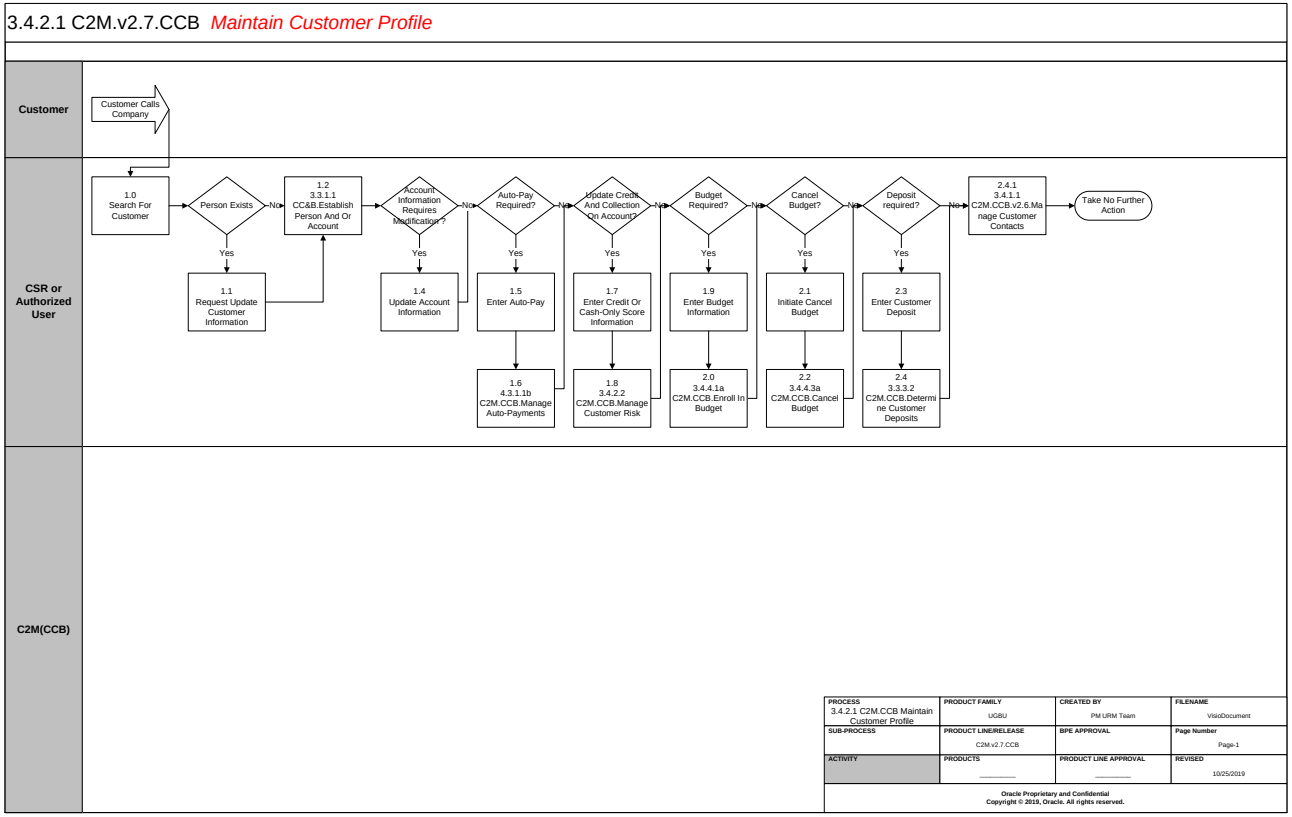
Field Code Changed



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Business Process Model Page 2

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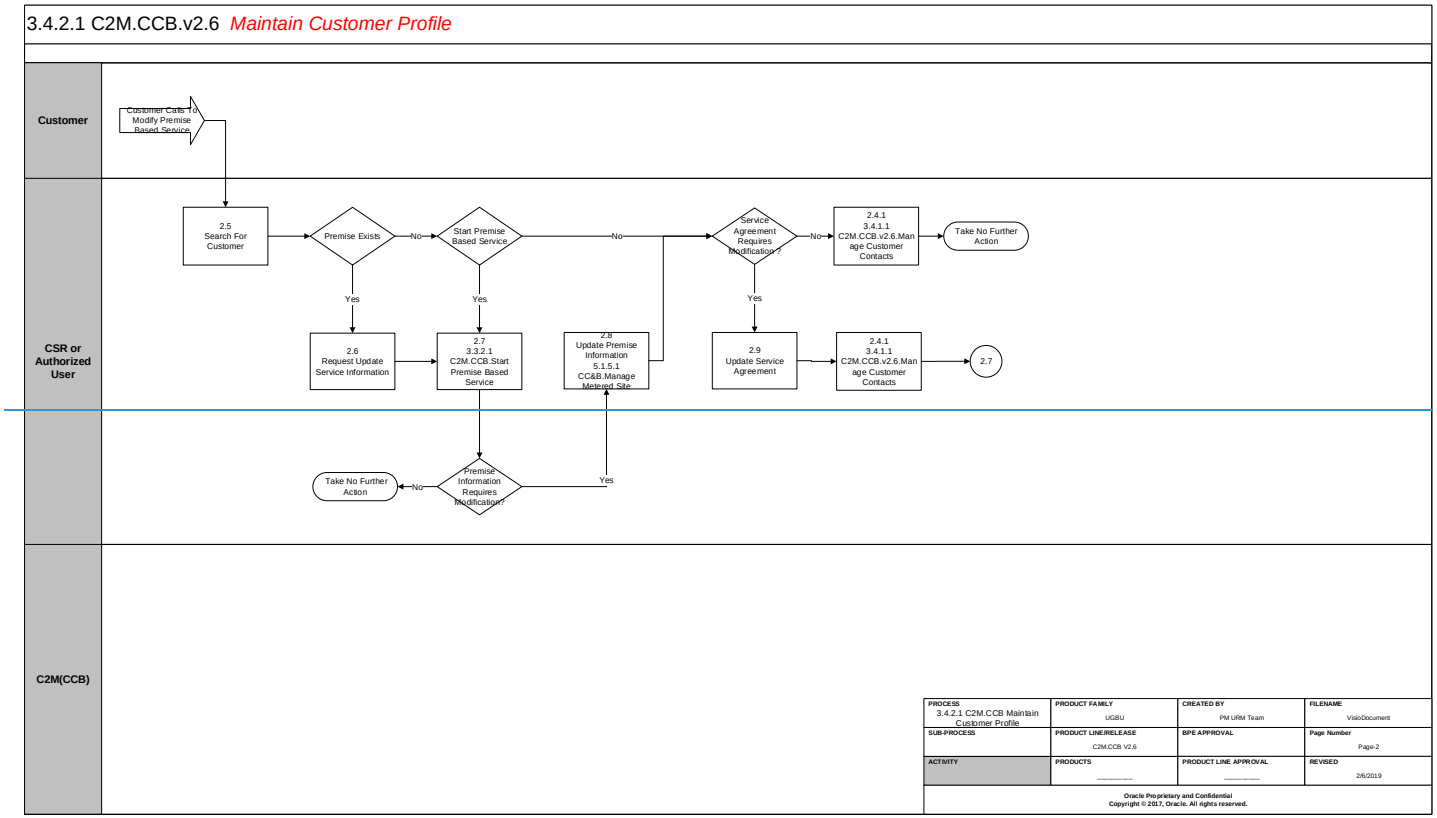

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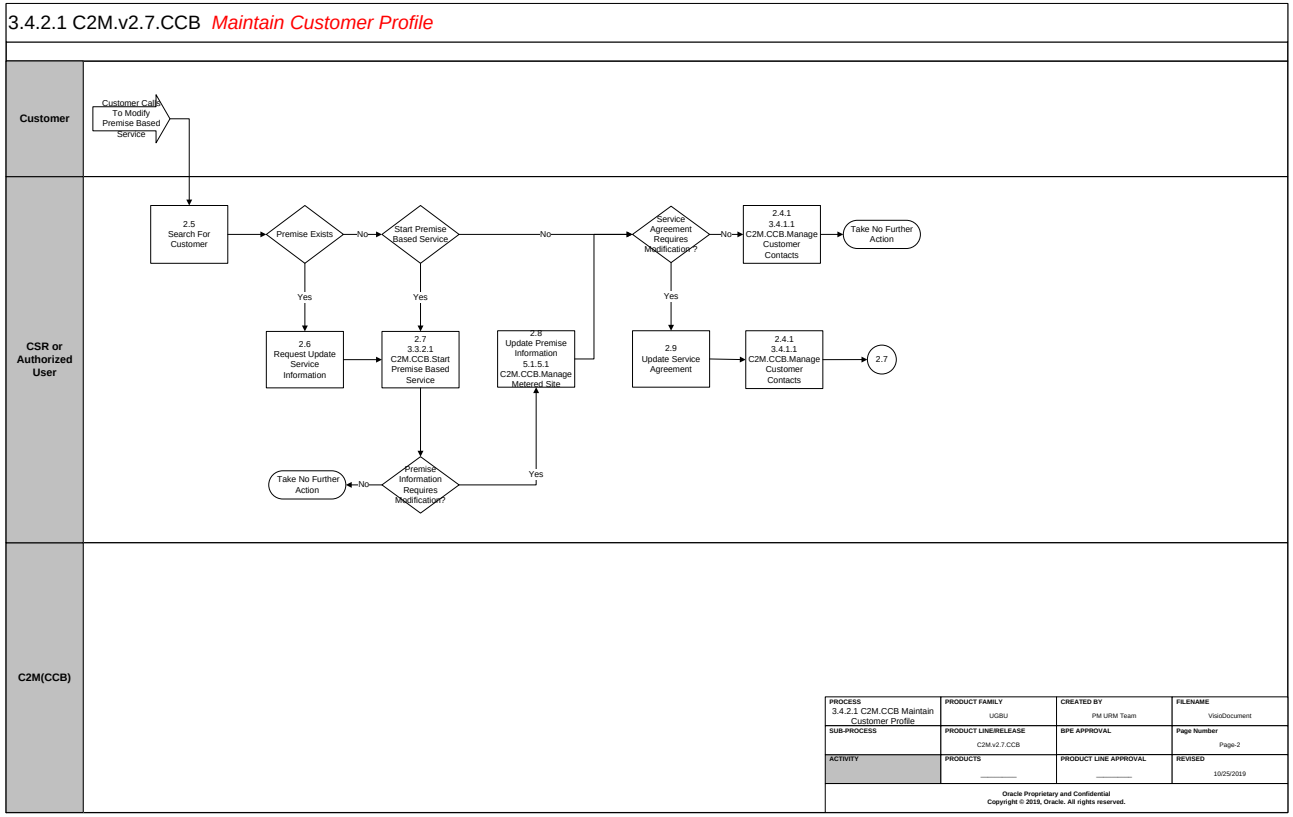
Field Code Changed



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Business Process Model Page 3

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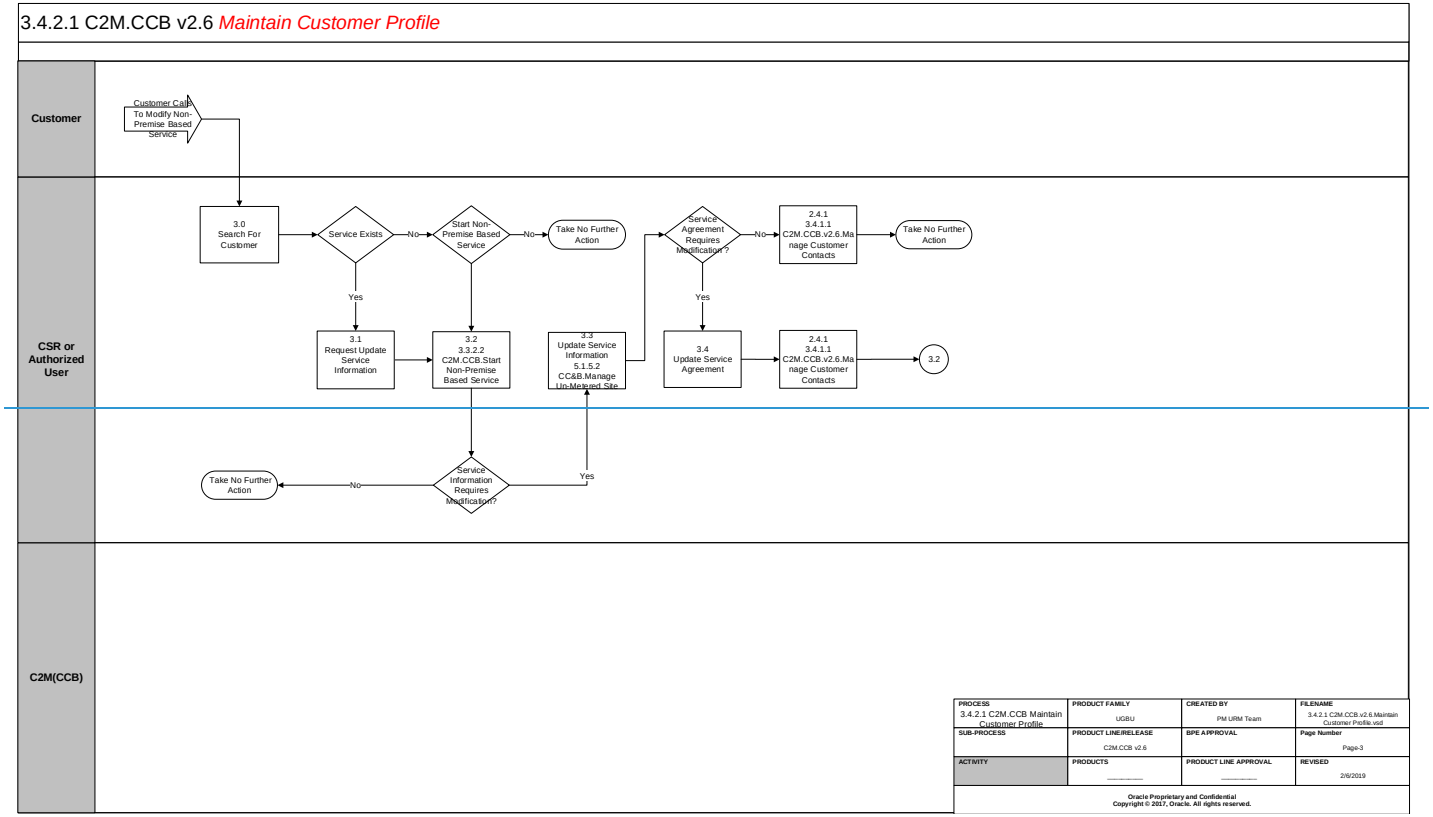

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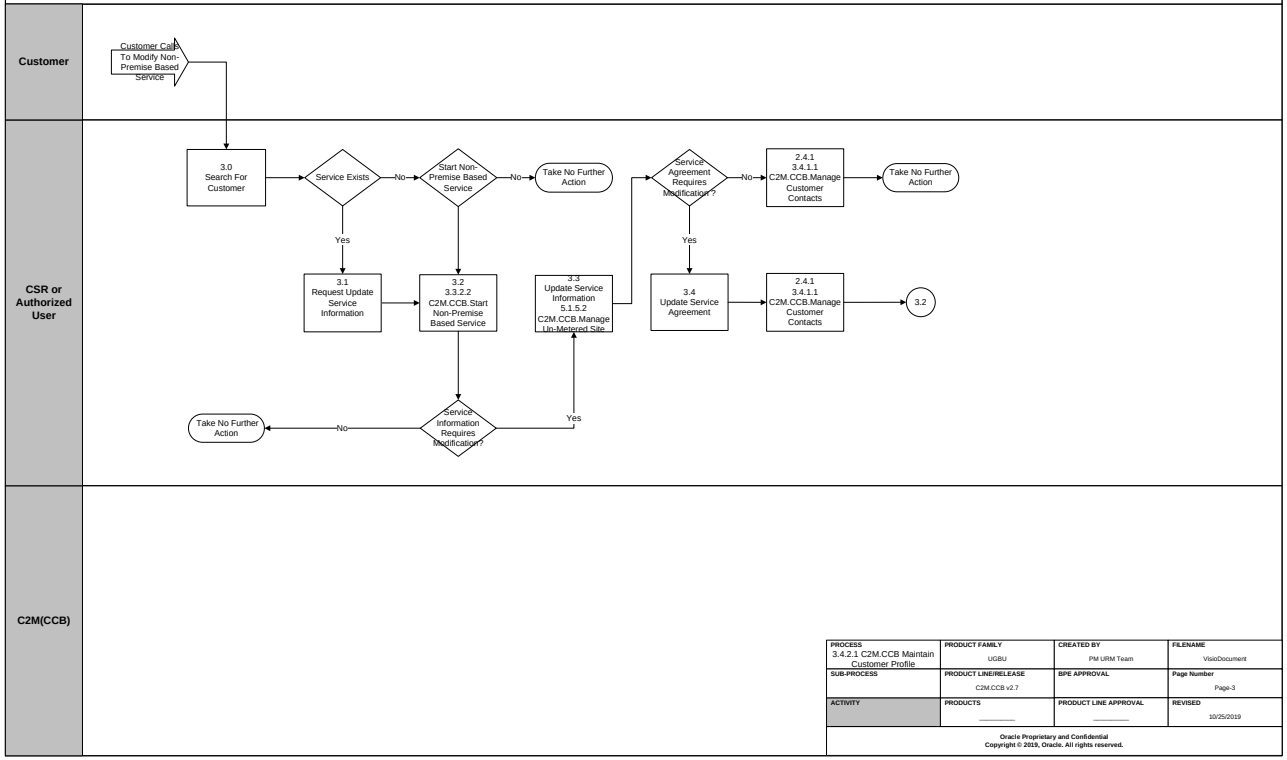
3.4.2.1 C2M.v2.7.CCB *Maintain Customer Profile*



Field Code Changed

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Detail Business Process Model Description

1.0 Search for Customer
Actor/Role: CSR or Authorized User
Description:
As a result of a customer request, the first step is to determine if that person exists or, if not, create a new person. The CSR is responsible for fulfilling customer requests.

1.1 Request Update Customer Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User is responsible for updating customer information.

1.2 3.3.1.1 C2M.CCB Establish Person and or Account
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User creates a person and/or an account. Refer to 3.3.1.1 C2M.CCB Establish Person and or Account.

1.4 Update Account Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User updates the required account information. Refer to 3.3.1.1 C2M.CCB Establish Person and or Account.

1.5 Enter auto-pay
Actor/Role: CSR or Authorized User
Description:
If the customer requires automatic payment on their account, enter the auto-pay information. Refer to 4.3.1.1b C2M.CCB Manage Auto-Payments

1.6 4.3.1.1b CC&B.Manage Auto-Payment
Actor/Role: CSR or Authorized User
Description:
If the customer requires automatic payment on their account, enter auto-pay information. Refer to 4.3.1.1b C2M.CCB Manage Auto-Payments

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1.7 Enter Credit or Cash-Only Score Information
Actor/Role: CSR or Authorized User
Description:
If the customer's credit or cash-only score is required, enter credit or cash-only score information. The process is provided 3.4.2.2 C2M.CCB Manage Customer Risk.

1.8 3.4.2.2 C2M.CCB.Manage Customer Risk
Actor/Role: CSR or Authorized User
Description:
Customers credit risk processes are provided in 3.4.2.2 C2M.CCB Manage Customer Risk.

1.9 Enter Budget Information
Actor/Role: CSR or Authorized User
Description:
If a customer requires a budget, enter budget information. The process is provided in 3.4.4.1a C2M.CCB Enroll in Budget.

2.0 3.4.4.1a C2M.CCB Enroll in Budget
Actor/Role: CSR or Authorized User
Description:
The Budget enrollment process is provided in 3.4.4.1a C2M.CCB Enroll in Budget.

2.1 Initiate Cancel Budget
Actor/Role: CSR or Authorized User
Description:
If a budget cancellation is required, initiate cancellation. The process is provided in 3.4.4.3a C2M.CCB Cancel Budget.

2.2 3.4.4.3a C2M.CCB Cancel Budget
Actor/Role: CSR or Authorized User
Description:
The Budget cancellation process is provided in 3.4.4.3a C2M.CCB Cancel Budget.

2.3 Enter Customer Deposit
Actor/Role: CSR or Authorized User
Description:
If a customer deposit is required, enter the deposit information. The process is provided in 3.3.3.2 C2M.CCB Determine Customer Deposit (Cash, Non-cash, 3rd party).

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2.4 3.3.3.2 C2M.CCB Determine Customer Deposit, (Cash, Non-cash, 3rd party)
Actor/Role: CSR or Authorized User
Description:
The Cash, non-cash and third party deposit process is provided in 3.3.3.2 C2M.CCB Determine Customer Deposit (Cash, Non-cash, 3rd party).

2.4.1 C2M.CCB.v2.6. Manage Customer Contacts
Actor/Role: CSR or Authorized User
Description:
The CSR or authorized user creates a customer contact to record the transaction between the Customer and the Company. The process is provided in C2M.CCB.v2.6. Manage Customer Contacts.

2.5 Search for Customer
Actor/Role: CSR or Authorized User
Description:
As a result of a customer request, the first step is to determine if the person exists or a new person needs to be created. The CSR is responsible for fulfilling customer requests.

2.6 Request Update Service Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User is responsible for updating service information on the premise

2.7 3.3.2.1 C2M.CCB Start Premise Based Service
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User starts service for a premise. Refer to 3.3.2.1 C2M.CCB Start Premise Based Service.

2.8 Update Premise Information 5.1.5.1 C2M.CCB Manage Metered Site
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User will update required information for the premise. Refer to 5.1.5.1 C2M.CCB Manage Metered Site

2.9 Update Service Agreement
Actor/Role: CSR or Authorized User
Description:

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

3.0 Search for Customer
Actor/Role: CSR or Authorized User
Description:
As a result of a customer request, the first step is to determine if the person exists or a new person needs to be created. The CSR is responsible for fulfilling customer requests.

3.1 Request Update Service Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User is responsible for updating service information.

3.2 3.3.2.1 C2M.CCB Start Non-Premise Based Service
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User starts service for a non-premise based service. Refer to 3.3.2.2 C2M.CCB Start Non-Premise Based Service.

3.3 Update Service Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User is responsible for updating service information. Refer 5.1.5.2 C2M.CCB Manage Un-Metered Site

3.4 Update Service Agreement
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User updates the required information for the Service Agreement.

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Test Documentation related to the Current Process

ID	Document Name	Test Type

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Document Control

Change Record

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Date	Author	Version	Change Reference
4/27/09	Stephanie Rogers	Draft 1a	No Previous Document
10/21/10	Geir Hedman		Update Title and Content page
2/8/11	Geir Hedman		Update Document and Visio
08/13/13	Dean Davis		Update Document and Visio
10/10/2013	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated word and visio to v2.6
09/22/2017	James Forman		Updated word and visio to C2M
10/15/2013	Galina Polonsky		Reviewed, Approved
08/20/2018	Jerry Chick		Replaced the Visio flow diagrams. Added step 2.4.1 Create Customer Contact. Other grammatical and syntax corrections.
08/29/2018	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7

Formatted Table

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Attachments

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