3.4.2.1 CC&B Maintain Customer Profile
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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.
3.4.2.1 C2M.v2.7.CCB Maintain Customer Profile

3.4.2.1 C2M.v2.7.CCB Maintain Customer Profile

Customer

CSR or Authorized User

C2M(CC)

Field Code Changed

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3.4.2.1 C2M.v2.7.CCB Maintain Customer Profile

**Customer**

- Customer Calls To Modify Non-Premise Based Service

**C2M(CCB)**

- Request Update Service Information
  - Service Exists
    - Yes
    - No
  - Take No Further Action

**CBR or Authorized User**

- Service Exists
  - Yes
  - No
  - Take No Further Action

- Service Agreement Requires Modification
  - Yes
  - No
  - Take No Further Action

Field Code Changed
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
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 in 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).
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:
3.4.2.1 C2M.CCB Maintain Customer Profile

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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3.4.2.1 C2M, v2.7, CCB, v2.6
Maintain Customer Profile

Attachments