

Using CX for Utilities Agent Service

Oracle Fusion Release 24B

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Title and Copyright Information

Using CX for Utilities Agent Service, Oracle Fusion Release 24B

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About This Guide

This chapter contains the following information:

- Audience and Scope
- Related Guides

Audience and Scope

If you're looking for information about how your customer service agents and managers can perform day-to-day tasks in your CX for Utilities Agent Service applications, then this guide is for you. The information is primarily aimed at customer service agents and customer service managers at a utility company.

This guide describes how to:

- [Access CX for Utilities Agent Service](#)
- [Use the Person and Premise Search](#)
- [Manage Customer and Account Information](#) using either:
 - [Customer 360](#)
 - [Customer Dashboard](#)

- [Use the Work Queue](#)
- [Use call features](#)
- [Use Knowledge Management](#)
- [Attach articles to the user interface](#)

Related Systems and Guides

The following systems are used with the CX for Utilities Agent Service system. Refer to the related documentation listed in this table to understand more about flows and functions covered in this guide.

Oracle System	Related Documentation
Customer Experience (CX) for Utilities	<p>The features described in this guide must be set up and configured during the implementation process.</p> <p>For information regarding the implementation of CX for Utilities solutions, see Implementing CX for Utilities in the Oracle Customer Experience for Utilities library.</p>
Oracle CX for Utilities Sales	<p>Several features discussed in this guide are shared between CX for Utilities Sales and CX for Utilities Agent Service. These experiences, which are both part of the Oracle Customer Experience for Utilities, can be used together to provide a robust set of features for your utility sales and service employees.</p> <p>For information about CX for Utilities Sales, see the Using CX for Utilities Sales Guide.</p>

Oracle System	Related Documentation
<p>Oracle Utilities Customer Information System (CIS), which can be:</p> <ul style="list-style-type: none"> ▪ Oracle Utilities Customer Cloud Service ▪ Oracle Utilities Customer to Meter 	<p>A supported Oracle Utilities CIS is required for CX for Utilities Agent Service to function correctly. See the following to access user and administrator documentation:</p> <ul style="list-style-type: none"> ▪ Oracle Utilities Customer Cloud Service library ▪ Oracle Utilities Customer to Meter library
<p>Oracle Fusion Service, which includes:</p> <ul style="list-style-type: none"> ▪ Service Requests ▪ Knowledge Management ▪ Computer Telephony Integration (CTI) 	<p>Oracle Fusion Service is required for CX for Utilities Agent Service to function properly. See the following topics in the Oracle Fusion Service library for additional information on the implementation and use of Fusion Service:</p> <ul style="list-style-type: none"> ▪ Create and edit service requests ▪ Use my knowledge ▪ Use knowledge authoring ▪ Set presence and availability ▪ Handle incoming calls
<p>Oracle Sales, which includes:</p> <ul style="list-style-type: none"> ▪ Contacts ▪ Accounts 	<p>Oracle Sales is required for CX for Utilities Agent Service to function properly. See the following topics in the Oracle Sales Automation library for additional information on implementing and using Oracle Sales:</p> <ul style="list-style-type: none"> ▪ Manage contacts ▪ Manage accounts

Overview

CX for Utilities Agent Service simplifies standard work processes for customer service agents and managers by providing a variety of tools that reduce the cost-to-serve and provide elevated customer service. This solution integrates the Oracle Sales and Oracle Fusion Service applications with one or more of these Oracle Utilities customer information systems:

- Oracle Utilities Customer to Meter
- Oracle Utilities Customer Cloud Service

The core capabilities of CX for Utilities Agent Service include:

- Manage new and existing contacts, customers, prospects, billing accounts and premises using the [Person and Premise Search](#) and one of these options:
 - [Customer 360](#)
 - [Customer Dashboard](#)
- Manage service requests and to do tasks using the [Work Queue](#).
- Manage phone availability and presence, and take calls with [Oracle's computer telephony integration \(CTI\)](#).
- Search for and view articles in the [Knowledge Management system](#) that can help you answer questions.
- [Attach relevant articles](#) to specific places in the user interface to assist customer service agents with answering questions. This task can be completed by customer service managers only.

As a customer service agent or manager, here are some examples of your journeys.

User Journey	For More Information
<p>The customer service agent receives a call from an existing customer. The dashboard displays the necessary information to help them resolve the caller's inquiry. Customer 360 and Customer Dashboard show information about billing and usage data, interaction history, payment assistance programs, and more.</p>	<p>See one of these topics, depending on which solution you are using:</p> <ul style="list-style-type: none"> ▪ Using Customer 360 ▪ Using the Customer Dashboard
<p>The customer service agent receives a call from an unknown caller and needs to process their start service request.</p>	<p>See Starting Service for a New Contact or Prospect</p>
<p>A customer service agent needs to manage a contact that is not associated with a billing account to keep a record of a relationship the utility may have.</p>	<p>See Creating a New Contact</p>
<p>The customer service agent needs to search the knowledge base to answer an unfamiliar question.</p>	<p>See Using Knowledge Management</p>
<p>The customer service agent needs to answer calls from an incoming call queue. They can use Oracle's integrated call and omni-channel management tools to answer calls and record call notes and resolution information.</p>	<p>See Using Call Features</p>

Get to Know the UI and Features

Understanding the features and main areas of the interface helps you as you work within CX for Utilities Agent Service. The main areas to be aware of include:

Work Queue

- The Work Queue provides easy access to all service request and to do tasks to which the agent or manager has access. The items that are displayed in the Work Queue are based on the user's security group and the configurations that are defined during implementation of the Oracle Fusion Service and Oracle Utilities systems.
- Search for and sort service requests and to do tasks using filters and sort options.
- Identify high-priority items that need your attention, and work on outstanding service requests and to do tasks.
- Assign service requests and to do tasks to yourself.

Person and Premise Search

- The Person and Premise Search provides you with a list of all customer, contact, prospect, and vacant premise records you can view within the Customer Experience for Utilities solutions. The actions you can take depend on the record type, which include:
 - **Customers:** These records represent Oracle Fusion contacts or accounts who are associated with a utility billing account. These entities exist as contacts or accounts in the Oracle Fusion systems and also as Persons in your Oracle Utilities customer information system.
 - **Contacts:** These records represent Oracle Fusion contacts who are not associated with a utility billing account. These could be persons that the utility wants to establish a relationship with, or any other person you need to record details for that is not attached to a billing account. These records exist only as contacts in the Oracle Fusion system, and do not exist in your Oracle Utilities customer information system.
 - **Prospects:** These records can represent businesses or people in multiple scenarios, as follows:

- Businesses that exist only as Oracle Fusion accounts. These could be businesses the utility wants to establish a relationship with.
- Businesses that exist as both an Oracle Fusion account and also as a Person (with Type = Business) in your Oracle Utilities customer information system, but were never associated with a utility billing account.
- People that exist as both an Oracle Fusion contact and also as a Person (with Type = Person) in your Oracle Utilities customer information system, but were never associated with a utility billing account.
- **Premises:** These records represent vacant premises, or premises that do not currently have any active service contracts.
- Search and sort by name, phone number, email address, or meter badge to easily access a specific contact, customer, prospect, or premise.
- Use the Actions button to:
 - Create a new Oracle Fusion contact.
 - Start service for a new caller.
- Use the Actions menu on existing customer, contact, or prospect records to:
 - Edit contact, prospect or customer information using the quick edit method.
 - Link an existing contact or prospect to an existing billing account.
 - Start utility service.
- Use hyperlink navigation to view and edit detailed information about contacts, customers, prospects, and premises.

Customer Management using Customer 360 or Customer Dashboard

- Depending on the setup at your utility, you will use either Customer 360 or the Customer Dashboard to view and manage utility billing account information and transactions. Customer 360 is available for current customers and for prospects that previously had utility service, and not for contacts, vacant premises, or accounts that exist only in the Oracle Fusion system.

Be aware that if you are using Customer Dashboard instead of Customer 360 to manage your customer information, some of the functionality discussed below is not yet available.

- After accessing Customer 360, you can complete these tasks:
 - View and manage billing account information
 - View multiple billing accounts for a contact
 - View and manage related persons
 - Access additional pages and applications
 - Access recently viewed pages and applications
 - View Knowledge Management articles
 - View activities
 - Set communication preferences
 - Send emails
 - Enroll customers in payment plans
- After accessing the Customer Dashboard, you can complete these tasks:
 - View billing account information
 - View multiple billing accounts for the same contact
 - Compare the current bill to historical bills
 - View a financial summary of the billing account
 - View insights regarding collections and payment arrangements

- View activities
- View billing history details
- View usage history details

Knowledge Management

- The Knowledge Management page tab provides you with easy access to Knowledge Management features, which enable you to access and manage articles that can help you answer customer questions. Customer service agents and managers are able to access all published articles from the interface.
- For information about using the Knowledge Management system, see the Use My Knowledge topic in the [Oracle Fusion Service library](#), which is available in the Oracle Help Center.

Article Configuration

- The Article Configuration page tab enables customer service managers to specify which published Knowledge Management articles appear within the Customer 360 interface.
- This page tab is available only for customer service managers. Customer service agents cannot access this tab.
- For information about configuring articles, see [Attach an Article to the Interface](#) and the Use knowledge authoring topic in the [Oracle Fusion Service library](#), which is available in the Oracle Help Center.

Computer Telephony Integration (CTI)

- If your solution is set up to use Oracle's CTI features, customer service managers and agents can manage their phone status, answer phone calls, and add wrap up details and call resolution notes to the call record directly from the interface.
- For additional information on this integration, see [Using Call Features](#) and these topics in the [Oracle Fusion Service library](#), which is available in the Oracle Help Center:

- Set agent availability and preferences.
- Use CTI notifications.

Accessing CX for Utilities Agent Service

When you log into CX for Utilities Agent Service, by default you are brought to one of the following tabs, depending on your role:

- **Person and Premise Search:** Agents are brought to the Person and Premise Search tab by default when they log in.
- **Work Queue:** CSR Managers are brought to the Work Queue tab by default when they log in. Additionally, CSR Managers also have access to the Article Configuration tab.

System administrators can change the default landing tab by role or by user as needed, using profile options.

Be aware that some users might also be set up with roles associated with CX for Utilities Sales, which can result in the display of additional tabs, such as the Business List, at the bottom of the page.

This image shows an example of the CX for Utilities Agent Service interface and identifies some of the main areas:

The screenshot shows the Oracle Work Queue interface. Callout 1 points to the Oracle logo in the top left. Callout 2 points to the search bar and filter buttons (Last Updated, To Dos, Service Requests, Assigned to Me). Callout 3 points to the notification bell icon in the top right. Callout 4 points to the first row of the work item table. Callout 5 points to the navigation tabs at the bottom (Work Queue, Person and Premise Search, Knowledge Management).

Severity	Work Item ID	Title	Name	Billing Account ID	Status	Type	Last Updated	Actions
4	SR0000062137	FAWQA_SR_CDRM_11_04_04	BIQA_Atut_Contact2_1stName Middle Name BIQA_Atut_Contact2_LastName		In Progress	Credit Card System	4/11/2023, 10:06 AM	...
High	SR0000052118	CX_AL_HK_CDRM1	BIQA_SER_CONTACT BIQA_SER_CONTACT		New	Return	7/15/2021, 12:13 PM	...
High	SR0000052117	CX_SA_HK_CDRM1	BIQA_SER_CONTACT BIQA_SER_CONTACT		New	Return	7/15/2021, 12:11 PM	...
Medium	SR0000064644	SR test SR	CX contact Automation KAMBusiness1	0038022601	New		9/15/2023, 6:50 PM	...
Medium	SR0000064643	Automation Billing SR16	CX contact Automation KAMBusiness1	0038022601	New		9/15/2023, 6:48 PM	...
Medium	SR0000064637	Automation Billing SR17	CX contact Automation KAMBusiness1	0091226990	New		9/15/2023, 5:23 AM	...
Medium	SR0000064631	Automation Billing SR16	CX contact Automation KAMBusiness1	0091226990	New		9/15/2023, 4:26 AM	...
Medium	SR0000064630	Automation Billing SR15	CX contact Automation KAMBusiness1		New		9/15/2023, 4:22 AM	...

Page Area	Description
1. Oracle Global Header	<p>This is the standard Oracle Global Header. You use this header to:</p> <ul style="list-style-type: none"> Access other Oracle Fusion systems and applications. Log in and out. Access your Oracle Fusion home page.

Page Area	Description
	<ul style="list-style-type: none"> ▪ Access and edit your profile. ▪ Manage notifications. <p>For additional information on using the Oracle header, see the Get Started chapter of the <i>Using Common Features Guide</i>, available in the Oracle Help Center.</p>
2. Search and Filter	<p>Most page tabs include an area at the top where you can search for and filter the records you want to review and manage.</p>
3. Computer Telephony Integration (CTI) Access	<p>If your solution is integrated with Oracle's CTI system, customer service agents will see a telephone icon on the top right of the page. Use this icon to answer and disconnect a call, display the telephony panel, change your status, enter call notes and resolution information, and view details about a call. When your call is complete, a notification pops up, reminding agents to close all open tabs that contain customer information. This icon is not displayed for CSR Managers.</p> <p>For additional information about integrating with a telephony system, see Using Call Features.</p>
4. Work Area	<p>This portion of the screen is the work area, and it changes depending on which page tab you select and which task you are completing. Use this section of the screen to search for, select, and manage records.</p>
5. Page Tab Area	<p>This portion of the screen displays the different page tab options that are available to you. Page tabs that are specific to CX for Utilities Agent Service include:</p> <ul style="list-style-type: none"> ▪ Work Queue

Page Area	Description
	<ul style="list-style-type: none"> ▪ Person and Premise Search ▪ Knowledge Management ▪ Article Configuration (Available for CSR Managers only) <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>Additional page tabs may be displayed for users who are also assigned to roles in CX for Utilities Sales. For example, the Business List is displayed in the screen above because this user also has a Key Account Manager role. For additional information about CX for Utilities Sales, see the Using CX for Utilities Sales Guide.</p> </div>

Accessing CX for Utilities Agent Service

To access the features of CX for Utilities Agent Service, you start from the Oracle Fusion Home Page. All roles use the same process to log in, but the system displays different tabs depending on the roles assigned to the logged-in user.

- Agents are brought to the Person and Premise Search
- Managers are brought to the Work Queue

Note: Contact your manager to receive log in information for the Oracle Fusion Home Page.

To access the experience:

1. From the Oracle Fusion Home Page, click the **Service** option at the top of the screen.
2. From the Service portal, click the **Utility Accounts** button.
3. By default, the system displays the **Person and Premise Search** tab for agents and displays the **Work Queue** tab for managers. System administrators can change the default landing tab by role or by user as needed, using profile options.

Using the Person and Premise Search

You use the Person and Premise Search page tab to:

- Search for and select existing contacts, prospects, customers, and inactive premises
- Create new contacts
- Link contacts and prospects to utility billing accounts
- Start service for contacts and prospects

By default, the Person and Premise Search tab displays all of the following records you have access to, based on your security group. Records that the system displays in the list can be:

- **Customers:** These records represent Oracle Fusion contacts or accounts who are associated with a utility billing account. These entities exist as contacts or accounts in the Oracle Fusion systems and also as Persons in your Oracle Utilities customer information system.
- **Contacts:** These records represent Oracle Fusion contacts who are not associated with a utility billing account. These could be persons that the utility wants to establish a relationship with, or any other person you need to record details for that is not attached to a billing account. These records exist only as contacts in the Oracle Fusion system, and do not exist in your Oracle Utilities customer information system.
- **Prospects:** These records can represent businesses or people in multiple scenarios, as follows:

- Businesses that exist only as Oracle Fusion accounts. These could be businesses the utility wants to establish a relationship with.
- Businesses that exist as both an Oracle Fusion account and also as a Person (with Type = Business) in your Oracle Utilities customer information system, but were never associated with a utility billing account.
- People that exist as both an Oracle Fusion contact and also as a Person (with Type = Person) in your Oracle Utilities customer information system, but were never associated with a utility billing account.
- **Premises:** These records represent vacant premises, or premises that do not currently have any active service contracts.

The options that are available to you for each record in the Person and Premise Search differ, based on the record type.

Be aware that if you are using the Customer Dashboard instead of Customer 360 to manage your customer information, some of the functionality discussed in this chapter is not yet available. Instances where functionality differs are noted below.

For contact records, you can:

- Edit contact information using the quick edit screen or by accessing the Oracle Fusion contact record.
- Link the contact to an existing utility billing account. (Customer 360 only.)
- Start utility service. (Customer 360 only.)

For prospect records, you can:

- Edit account information using the quick edit screen.
- Link the account to an existing utility billing account. (Customer 360 only.)
- Start utility service. (Customer 360 only.)

- Depending on the type of prospect, clicking the **Prospect** link will bright you to the Oracle Fusion account record, or to Customer 360 or the Customer Dashboard.

For customer records, you can:

- Access [Customer 360](#) or [Customer Dashboard](#) to manage data and transactions.
- Edit customer information using the quick edit screen.
- Start utility service. (Customer 360 only.)
- Update communication preferences. (Customer 360 only.)

For premise records, you can:

- Access premise details in your Oracle Utilities customer information system.

Additionally, you can use the Person and Premise Search to:

- Create a new contact.
- Start service for a new customer.

This image identifies the key areas of the Person and Premise Search screen:

Person and Premise Search
Residential and Business Billing Accounts and Contacts

Search: Name ▾ Robert

Filters: All types ▾ Actions ▾

Name ^	Type ◇	Billing Account ID ◇	Premise Address ◇	Primary Identifier ◇	Primary Phone ◇	Primary Email ◇
Robert Alan Edwards	Prospect					
Robert Oppenheimer	Customer	3368493490	House 345, km St, San Francisco, CA, 94102	SSN **3123	+1 (111) 765-5651	robert.o@example.com
Robert Oppenheimer	Customer	6908282511	House 345, km St, San Francisco, CA, 94102	SSN **3123	+1 (111) 765-5651	robert.o@example.com
Robert Oppenheimer	Customer	8441506772		SSN **3123	+1 (111) 765-5651	robert.o@example.com

Navigation: Work Queue | Person and Premise Search | Knowledge Management

This table describes the main areas that appear on the screen when you select the Person and Premise Search page tab:

Page Area	Description
1. Search Area	<p>Use the options in this section of the form to search for the customer, contact, prospect, or premise you want to view. You can enter a full or partial name, billing account ID, email address, phone number, address, primary identifier, meter badge, or geo type in the search bar.</p> <p>You can use an asterisk (*) as a wild card in your search for all options except when searching by phone number. When searching by phone number, you must use (123) 456-</p>

Page Area	Description
	<p>7890 format.</p> <p>You can also sort your results using the arrows next to the column headings.</p>
2. Display Type Filter	<p>Use the Display Type filter to narrow your search results. By default, the display filter is set to All Types, which displays all records. You can select additional options to display only a specified record type.</p>
3. Actions Button	<p>When you click the Actions button, you can select from these options:</p> <ul style="list-style-type: none"> ▪ Create New Contact: Use this option to create a new Oracle Fusion contact record. Using this option does not create any records in your Oracle Utilities customer information system. ▪ New Start Service: Use this option to start service for a person or business that does not yet exist in the Oracle Fusion system and does not have an existing utility account. This option has you create an Oracle Fusion contact or account record, and then complete a step-by-step process to create a utility billing account. After you complete this task, the system displays either the Customer 360 or Customer Dashboard screen, which is determined by your utility, and these records exist: <ul style="list-style-type: none"> ▪ Oracle Fusion contact (for a person) or account (for a business) record ▪ Oracle Utilities billing account record ▪ Oracle Utilities person record with type = Person or Business

Page Area	Description
4. Actions Menu (not depicted)	<p>You can use the Action menu that appears at the end of each record in the customer list to:</p> <ul style="list-style-type: none"> ▪ Perform a Quick Edit: Use the Edit Contact, Edit Prospect, or Edit Customer action menu items to perform a quick edit of the entities main contact information. Selecting one of these options displays a pop-up window that you can use to quickly edit the contact information without having to access additional forms or records. ▪ Link to Billing Account: This option is available only for contact and prospect records that are not connected to a utility billing account, and only when using Customer 360. Use this option to link the Oracle Fusion contact or account to an existing utility billing account. After completing this task, changes that are made to this contact, account, or billing account are synchronized between the systems. ▪ Start Service: This option is available only for contact and prospect record types that are not connected to a utility billing account, and only when using Customer 360. Use this option to start utility service for the contact or prospect. After completing this task, the entity is a customer, and exists in both systems. Any changes that are made are then synchronized between the systems. ▪ Update Communication Preferences: This option is available only for customer type records, and only when using Customer 360. Use this option to update the communication preferences for the customer, which can include the mailing address, email address, and phone number.
5. Hyperlink Navigation	<p>You can use the hyperlink in the Type column to access the main page for a record. The navigation of the hyperlink depends on the record type and the systems in which the record exists.</p>

Page Area	Description
	<ul style="list-style-type: none"> ▪ Customer: Clicking the Customer link in the Type column navigates you to either the Customer 360 or the Customer Dashboard screen for the selected row. Which of these screens you access depends on the setup at your utility. Use this option to review and update contact and billing account information, and to perform common transactional tasks the customer might request. For additional information, see Using Customer 360 or Using the Customer Dashboard. ▪ Contact: Clicking the Contact link in the Type column navigates you to the Oracle Fusion Contact page, where you can view and edit contact information. If a record for this contact exists in both Oracle Sales and in your Oracle Utilities customer information system, the system synchronizes any changes you make between the systems. ▪ Prospect: Clicking the Prospect link in the Type column navigates you to one of these pages, depending on the type of prospect: <ul style="list-style-type: none"> ▪ Oracle Fusion Account page: This navigation occurs for businesses that exist only as Oracle Fusion accounts. Updates are made to the account are not synchronized to your Oracle Utilities customer information system. ▪ Customer 360 or Customer Dashboard page: This navigation occurs for all other prospect records, enabling you to view previous account-related data. Updates made here are synchronized between the systems. ▪ Premise: Clicking the Premise link in the Type column navigates you to the premise details in your Oracle Utilities customer information system.

Searching for Contacts, Customers, Prospects, and Premises

When you answer a call in a utility service center, you can use the Person and Premise Search page tab to search for records associated with the caller or premise so you can view the information you need to resolve the caller's inquiry.

To search for contact, customer, prospect, and premise records:

1. [Access CX for Utilities Agent Service](#).
2. From the **Person and Premise Search** page tab, in the **search** field, select your search method from the drop down menu. Options include:
 - **Name**
 - **Billing Account ID**
 - **Phone Number**

By default, you must enter the phone number in (123) 456-7890 format and you cannot use wild cards. However, your system administrator can set up a different format for entering phone numbers in search.
 - **Email**
 - **Address**
 - **Primary Identifier** (Select a sub-option as needed.)
 - **Geo Type** (Select a sub-option as needed.)
 - **Meter Badge**
 - **Prior Billing Account ID**
3. Enter full or partial text in the search field, and then hit **Enter**:
4. To sort the displayed records:

- Click the **Sort** icon next to one of the column headings. By default, the column is sorted in ascending order. Click the icon again to sort in descending order.
 - Note that you can sort by only one column heading at a time.
1. When you have found the contact, customer, prospect, or premise you want to view or update, click the **Actions** menu on the right side of the record to view allowed actions, or click the hyperlink in the Type column to access the main page for the record.
 2. Continue to one of these topics:
 - [Editing Contacts \(Quick Method\)](#)
 - [Accessing the Oracle Sales Contact Page](#)
 - [Using Customer 360](#)
 - [Using the Customer Dashboard](#)
 - [Linking a Contact to a Utility Billing Account](#)
 - [Starting Service for an Existing Contact](#)
 - [Setting Communication Preferences](#)
 - [Creating a Payment Plan](#)
 - Premise Management, available in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Editing Contacts, Customers, and Prospects (Quick Method)

A common call received by customer service agents is a request to update a primary phone or email address for a contact, customer, or prospect. You can use the Person and Premise Search to quickly access and update this information for callers.

Be aware that:

- The caller must exist in the system to complete this task using the described steps.
- The caller can also be attached to a billing account in your Oracle Utilities customer information system.

To edit contact, customer, or prospect information using the quick method:

1. [Search for your caller](#).
2. On the right side of the screen, click the **Actions** menu for the record you want to update, and then select one of these options, which is determined by your record type:
 - **Edit Contact**
 - **Edit Prospect**
 - **Edit Customer**
3. The system displays the Edit Contact, Edit Customer, or Edit Prospect window.
4. Update these fields as needed:
 - **Email**
 - **Primary Phone**
5. Click **Save**.
6. The system saves the changes and displays them in the Person and Premise Search.

Editing Contacts, Customers, Prospects, and Premises (Detail Method)

When you receive a call in the utility service center, you might want to view and update detailed information associated with the contact, customer, prospect, or premise. To do so, you can access the main record associated with the caller's inquiry so can view their information and perform any necessary actions. You use the hyperlinks in the Type column to access these detailed records, which vary depending on the record type, as follows:

- **Contact:** Clicking the Contact hyperlink brings you to the Oracle Fusion Contact page.
- **Customer:** Clicking the Customer hyperlink brings you to either the Customer 360 page or the Customer Dashboard page, depending on your utility's setup.

Note that if you are using the Customer Dashboard, you cannot edit customer information using this method.

- **Prospect:** Clicking the Prospect hyperlink brings you to one of these pages:
 - **Oracle Fusion Account page:** This navigation occurs for businesses that exist only as Oracle Fusion accounts.
 - **Customer 360 or Customer Dashboard page:** This navigation occurs for all other prospect records, enabling you to view previous account-related data. The screen that is displayed depends on the setup at your utility.
- **Premise:** Clicking the Premise hyperlink brings you to the premise details in your Oracle Utilities customer information system.

The caller or premise must exist in the system to complete these tasks using the described steps.

To access the main page for a caller:

1. [Search for the caller](#) you want to view.
2. Click the hyperlink in the **Type** column for the record, which navigates you to the caller's main page as follows:
 - **Contact:** Clicking the Contact hyperlink brings you to the Oracle Sales and Service Contact page.
 - **Customer:** Clicking the Customer hyperlink brings you to either the Customer 360 page or the Customer Dashboard page, depending on your utility's setup.

Note that if you are using the Customer Dashboard, you cannot edit customer information using this method.

- **Prospect:** Clicking the Prospect hyperlink brings you to the Oracle Fusion Account page or to the Customer 360 or Customer Dashboard page.
- **Premise:** Clicking the Premise hyperlink brings you to the premise details in your Oracle Utilities customer information system.

3. For more information, see:

- Manage Contacts in the [Oracle Sales Automation library](#)
- Manage Accounts in the [Oracle Sales Automation library](#)
- [Using Customer 360](#)
- [Using the Customer Dashboard](#)
- Premise Management, available in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Creating a New Contact

When a new contact calls into your call center, you can create a new record in your system for them. This record enables you to gather and store information about this contact for future use. This option creates a contact record in the Oracle Fusion system, but does not create a record in your Oracle Utilities customer information system.

For example, Fred Jones calls in to inquire about what he would need to do to get utility services turned on when he moves to the area. He is not ready to start service, but the customer service agent creates a contact record for him to store his information.

The steps in this topic should be used to create contact information for persons, and not businesses. To record information about a new business contact, create an Oracle Fusion account. For information about creating and managing accounts, see *Manage Accounts* in the [Oracle Sales library](#).

To create a new contact:

1. [Access CX for Utilities Agent Service](#).
2. From the **Person and Premise Search** page tab, click the **Actions** button at the top of the page, and then select **Create New Contact**.
3. Complete the following fields:
 - **First Name** (Required)
 - **Last Name** (Required)
 - **Email**
 - **Work Phone**
 - **Mobile Phone**
 - **Address Line 1**
 - **Address Line 2**
 - **City**
 - **State**
 - **Postal Code**
 - **Country** (Required)
4. Specify which phone number is the primary number by selecting the **Primary** option next to the appropriate phone number. By default, the first number you enter will be marked as the primary number.
5. If the contact is associated with an existing Oracle Fusion account, you can also complete these fields:
 - **Account**
 - **Job Title**

6. Click **Continue** at the top right of the form.
7. Review the contact information to verify it is accurate.
8. To edit the contact information, click the **Edit** (pencil) icon, update the incorrect information, and then click **Continue** at the top right of the form.
9. If the information is accurate, click **Submit** at the top right of the form.
10. The system opens the Oracle Sales Edit Contact screen. Click **Save and Close** to complete this task.
11. For additional information about updating contact information, see Manage Contacts in the [Oracle Sales library](#).

Linking a Contact or Prospect to a Utility Billing Account

Some contact or prospect records in your system might not be linked to an existing billing account. For example, a security guard who works at a business that has an account with the utility might already exist as a contact in the Oracle Sales system because he is the contact person for service calls. However, if he changes positions within the business, and now must have access to account and billing information, you can link his contact record to the business's billing account.

Before you complete this task, the contact or prospect record must already exist. See [Creating a New Contact](#) for instructions.

If your utility is using the Customer Dashboard instead of Customer 360, this functionality is not currently available.

To link a contact or prospect to an existing billing account:

1. [Search for the contact or prospect record](#).
2. Click the **Actions** menu on the right side of the record.
3. Click the **Link to Billing Account** option.
4. On the Redirect to Link Account window, click **Continue**.

5. The Customer 360 screen opens with the **Add Person to Account** process flow fields enabled in the work area. The fields that appear in this process flow can vary, as they are configured in your Oracle Utilities system. Complete the required information in each of these categories. Click **Next** after you complete each category.
 - **Account**
 - **Person Details**
 - **Preferences**
6. When you have entered all of the information, review it and then click **Submit**.

Starting Service for an Existing Contact or Prospect

Complete this task when an existing contact or prospect calls in to start their utility service, and there is no existing utility billing account to link them to.

For example, two months ago, Fred Jones called in to inquire about what he would need to do to get utility services turned on when he moved to the area. At that time, a customer service agent created a contact record for him. Fred has now moved into the area and is calling in to start his service.

If your utility is using the Customer Dashboard instead of Customer 360, this functionality is not currently available.

To start service for an existing contact or prospect:

1. [Search for the contact or prospect record](#).
2. Click the **Actions** menu on the right side of the record and select **Start Service**.
3. On the Redirect to Start Service window, click **Continue**.
4. The Customer 360 window opens. In the work area of the screen, complete the information required to start service for a new customer. This includes completing multiple steps that gather customer information. The information that is required is

configured in your Oracle Utilities customer information system, and is divided into the following categories. Complete the information for each category, and then click **Next** to continue.

- **Move-to Premise Address**
- **Customer Identification**
- **Services to Start**
- **Person and Account Details**

5. After you enter all required customer information, review and then click **Finish** to submit the information.

Starting Service for a New Contact or Prospect

When a caller wants to start utility service, and they have no existing contact or prospect records in your system, you can walk them through the process to set up and start their service. Use this task for callers that have no existing contact or prospect records in the system.

If you are unsure of whether the caller already has a contact or prospect record in the system, [perform a search](#) before completing this task. If the caller already has a contact or prospect record, see [Start Service for an Existing Contact or Prospect](#).

If your utility is using the Customer Dashboard instead of Customer 360, this functionality is not currently available.

To start service for a new contact or prospect:

1. [Access CX for Utilities Agent Service](#).
2. From the **Person and Premise Search** page tab, click the **Actions** button at the top of the page, and then select **New Start Service**.
3. To start residential service, select **Residential** in the **Select contact type** field, and then complete these fields:

- **First Name**
 - **Last Name**
 - **Mobile Phone Number**
 - **Home Phone Number**
 - **Email**
4. To start business service, select **Business** in the **Select contact type** field, and then complete these fields:
 - **Business Name**
 - **Phone Number**
 - **Email**
 5. Click **Continue** at the top right of the form.
 6. Review the information to verify it is accurate.
 7. To edit the information, click the **Edit** (pencil) icon, update the incorrect information, and then click **Continue** at the top right of the form.
 8. If the information is accurate, click **Submit** at the top right of the form.
 9. On the Redirect to Start Service window, click **Continue**.
 10. The Customer 360 window opens for the new customer. In the work area of the screen, complete the information required to start service. This includes completing multiple steps that gather required information. The information that is required is configured in your Oracle Utilities customer information system, and is divided into the following categories. Complete the information for each category, and then click **Next** to continue.
 - **Move-to Premise Address**
 - **Customer Identification**

- **Services to Start**
- **Person and Account Details**

11. After you enter all required information, review and then click **Finish** to submit the information.

Managing Customers and Accounts

There are two options available to manage customer information:

- **Customer 360:** This option displays an embedded version of your Oracle Utilities customer information system (CIS). When you use Customer 360, the work portion of the screen is formatted in the same way as your CIS, displaying the same zones in the same order.
- **Customer Dashboard:** This option is an updated version of Customer 360, and provides you with a dashboard that is built directly within the CX for Utilities Agent Service interface.

Your utility can configure which option is displayed when accessing customer and account information. Contact your manager to determine which option is available to you.

Using Customer 360

You use Customer 360 to manage utility billing account information and transactions. Customer 360 is available for contacts and prospects who are linked to one or more billing accounts, and not for contacts or accounts that exist only in the Oracle Fusion system or for vacant premises.

The layout of Customer 360 in CX for Utilities Agent Service mimics the layout of Customer 360 in your Oracle Utilities customer information system. For example, if Customer 360 in Oracle Utilities is configured to show 5 zones, in a specific layout, Customer 360 in CX for Utilities Agent Service will have the same 5 zones, in the same layout.

For information about zones and completing tasks in Customer 360, see the *Business User Guide* associated with your Oracle Utilities system. All documentation for these systems is available in the [Energy and Water Help Center](#).

You access Customer 360 by searching for a customer in the Person and Premise Search page tab, and then clicking on the Customer or Prospect hyperlink.

Clicking a Customer link directs you to Customer 360. However, clicking a Prospect link will take you to Customer 360 only if the prospect was previously attached to a utility billing account. Otherwise, clicking the Prospect link will take you to the Oracle Fusion Account page.

After accessing Customer 360, you can complete these tasks:

- View and manage billing account information
- View multiple billing accounts for a contact
- View and manage related persons
- Access additional pages and applications
- Access recently viewed pages and applications
- View pre-defined Knowledge Management articles
- Search for and view additional Knowledge Management articles
- View activities
- Create service requests
- Set communication preferences
- Send emails
- Enroll customers in payment plans

This image identifies the key areas of the Customer 360 screen:

This table describes the main areas of Customer 360:

Page Area	Description
1. Account	<p>If the contact you are viewing is attached to multiple utility billing accounts, an arrow appears next to the Account field that enables you to select the billing account you want to view. If the account has multiple premise addresses, a badge appears next to the address to identify that there are multiple addresses.</p> <p>If the customer has only one billing account, the account number appears as a hyperlink that you can click to refresh Customer 360 with that information.</p>

Page Area	Description
2. Related Persons	<p>If there are multiple people associated with the billing account you are viewing, you can use the Related Persons field to view contact information about those people.</p> <p>The field display varies as follows:</p> <ul style="list-style-type: none"> ▪ If there are no related persons, the field is not displayed. ▪ If there is only one related person, that name appears as a hyperlink. Click the name to view the contact information. ▪ If there are multiple related persons, an arrow appears next to the field. Clicking the arrow displays the names of all related persons. Select a name to view the contact information.
3. Quick Action Bar (What would you like to do?)	<p>Use this field to navigate to pages and trigger actions that enable you to view and manage customer data and perform common activities. This includes accessing applications in other Oracle systems. When you type a value in this field, the system displays all available options that include your text.</p> <p>For example, if you type "update" in this field, the system might display options such as:</p> <ul style="list-style-type: none"> ▪ update preferences ▪ update contacts ▪ update device name

Page Area	Description
	<p>You can click on any of the displayed results, and the system opens the selected application or page in a new browser window.</p> <p>The options that appear are determined by the applications and options you have access to. Some common options that are available to customer service agents include:</p> <ul style="list-style-type: none"> ▪ Create service request: Opens a drawer that enables you to quickly create a service request directly in Customer 360. ▪ Search knowledge management: Opens the Knowledge Management search in a new tab. ▪ Send email: Opens an email composition screen. ▪ Create payment plan: Opens the payment plan workflow, which analyzes the customer's eligibility and provides payment plan recommendations.
4. Recently Viewed	<p>Use this option to quickly return to pages you have previously viewed while working with the selected billing account. The options that appear in the list help you quickly navigate between different screens as you work with your callers.</p> <p>This list is refreshed each time you select a new billing account. Therefore, you only see the options you've viewed for the selected billing account. If you have not viewed any other applications recently, this option is not displayed.</p>
5. Customer 360 Display Area	<p>This portion of the field displays information about the selected billing account. You use this section of the form to view and manage contact and billing account</p>

Page Area	Description
	<p>data and transactions. The zones that are displayed, and the layout of the work area, are controlled by the layout of Customer 360 in your Oracle Utilities system.</p> <p>For example, if Customer 360 in your Oracle Utilities system is configured to show 5 zones, in a specific layout, the Customer 360 display area in CX for Utilities Agent Service will have the same 5 zones, in the same layout.</p> <p>For information about using zones and completing tasks in Customer 360, see the <i>Business User Guide</i> in the library associated with your Oracle Utilities system, which is available in the Energy and Water Help Center.</p>
6. Activity Pane	<p>Use the Activity Pane to view the interactions associated with the selected billing account. By default, the system displays the following types of interactions that have occurred over the last six months:</p> <ul style="list-style-type: none"> ▪ Calls ▪ Emails ▪ Service Requests ▪ Bills & Payments ▪ Field Activities ▪ Service Orders ▪ Customer Contacts

Page Area	Description
	<ul style="list-style-type: none"> ▪ Self-Service Tasks <p>You can filter the list by selecting specific activity types, or by defining a date range that is in six-month increments, up to three years in the past. You can also click on individual activities to see additional information.</p>

Accessing Multiple Billing Accounts

Some contacts have multiple billing accounts with a utility. For example, a contact might have a primary residence and a vacation home, each with a separate billing account. You can view all of the billing accounts associated with a contact from Customer 360.

To Access Multiple Billing Accounts from Customer 360:

1. Access Customer 360.
2. In the **Account** field, click the arrow to display all of the billing accounts associated with the selected contact. If there is no arrow next to the **Account** field, the contact has only one billing account. If a billing account has more than one premise address, a badge appears next to the displayed address to indicate there are multiple premises.
3. Click on the billing account you want to view.
4. The system displays the information for the selected billing account.

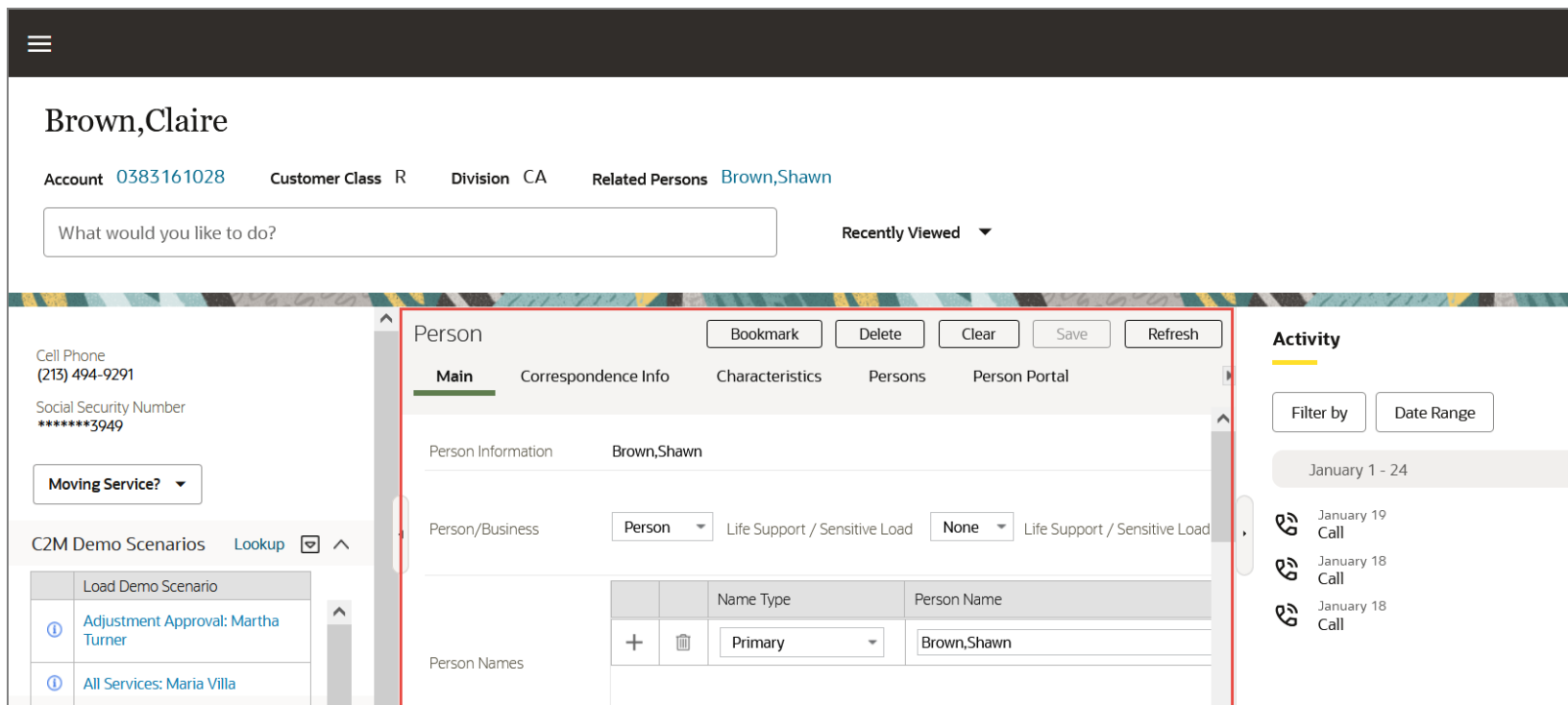
Managing Related Persons

A billing account might include people other than the primary contact. These people are called related persons. After you have selected a contact, and accessed Customer 360, you can view and update the information for all related persons, or you can add or delete a related person.

You access existing related person records using the **Related Persons** field in the header area of Customer 360. If this field does not appear, there are currently no related person records associated with the billing account. If the billing account has only one related person, the name of that person appears as a hyperlink in the **Related Persons** field. If there are multiple related persons, an arrow appears next to the field. You can click this to view and select a person.

When you click on a related person, the related person now appears in the **Current Context** field at the left of the screen, indicating that the focus has changed from the primary account holder. The Person zone also loads in the work area. You can update, add, or delete related persons from this zone. The exact layout of this section, along with what is considered required information, is determined by the application in your Oracle Utilities customer information system.

This image shows an example of the Person zone:



To view and manage related persons:

1. Access Customer 360.
2. In the **Related Persons** field, click the name of the person you want to view, or click the arrow and then select the name of the person you want to view.
3. The system displays the **Person** zone in the work area.
4. Note that the layout, required fields, and fields names that appear in this zone can vary based on how your Oracle Utilities customer information system is configured. From this screen you can:
 - Edit existing related person records.
 - Delete related person records.
 - Add new related person records.

For additional information about how to manage related persons, see the topics listed below in the *Business User Guide* associated with your Oracle Utilities system. All documentation for these systems is available in the [Energy and Water Help Center](#).

- Maintaining Persons
- Maintaining Accounts

Accessing Additional Pages and Applications

Customer 360 provides you with a predefined set of zones and options. However, when interacting with callers, your agents might need to access additional features, pages, or applications within other systems to handle a call.

You can access additional pages and applications using these methods:

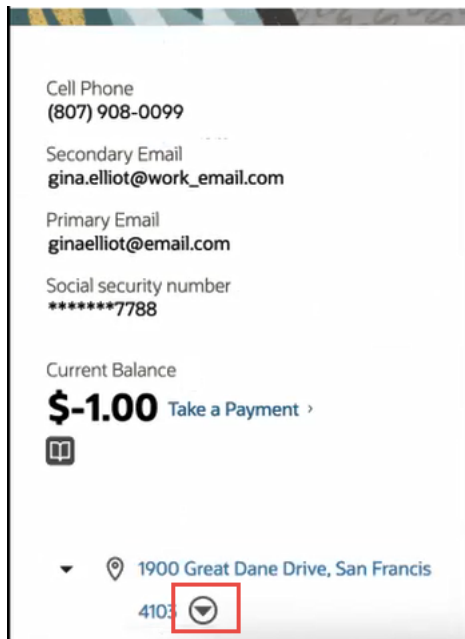
- Context menus
- Quick Action bar

Using Context Menus

Within Customer 360, there are context menu icons. These icons provide access to applications in your Oracle Utilities customer information system that are related to a particular piece of data in the interface. For example, you might see a context menu icon next to a premise address. When you click on the icon, the system might display options such as Go To Premise or Go To Outage Information.

Only options that are available to the user are displayed. Users can click on an option, and the system opens the application in a new browser window.

This image shows an example of a context menu icon:



Using the Quick Action Bar

You can use the Quick Action bar (also called What would you like to do?) to search for and navigate to relevant pages and functionality to help you support callers. To access these pages and applications, simply type key words into the field. The

system displays all available options that contain your text. You can then click on one of the suggested options, and the system opens the application in a new browser window.

This table provides some examples of how you can use the Quick Action bar.

To access these pages or applications...	Enter this in the Quick Action bar...
Knowledge Management page in Oracle Fusion Service	Search knowledge management
Any menu item in your Oracle Utilities customer information system to which you have access	Enter the name of the menu option as it appears in your Oracle Utilities system. For example, enter "rate check".
Access features within CX for Utilities Agent Service	<p>You can access features that are available in CX for Utilities Agent Service by searching for them in the Quick Actions bar. For example:</p> <ul style="list-style-type: none"> ▪ Enter "send email" to access a feature that enables you to compose and send an email to the customer you are viewing. ▪ Enter "create a service request" to open the Create Service Request drawer in Customer 360.

To access applications and pages from Customer 360:

1. Access Customer 360.
2. Type key words in the Quick Action bar and review the options that the system displays below the field.

3. Click on the appropriate option.
4. The system opens the application or page in a new window.
5. For instructions on how to use these applications or pages, see:
 - The appropriate topic in the [Oracle Fusion Service library](#).
 - The *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Accessing Recently Viewed Pages

When you are working with a caller, you might need to access different pages and applications to view information related to their inquiry. When you access other pages and applications from Customer 360, and then return to Customer 360, a **Recently Viewed** option appears in the header of the screen. When you click this option, a list of recently viewed pages and applications is available to choose from. This option enables you to quickly return to a screen you were previously viewing.

Note: The **Recently Viewed** option in Customer 360 works the same way the **History** option works in Oracle Utilities customer information systems.

To access recently viewed pages:

1. Access Customer 360.
2. Use the search bar to [access another page or application](#).
3. Return to Customer 360.
4. Click the **Recently Viewed** option in the header of the screen, and then select one of the available options to return to that page or application.

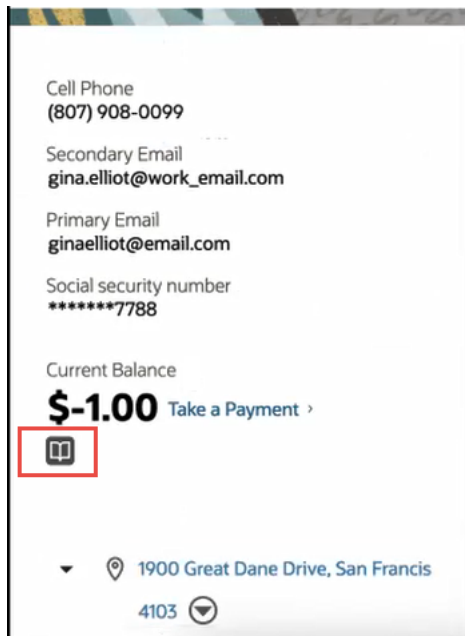
Accessing Knowledge Management from Customer 360

When you are viewing billing account information in Customer 360, you might want to access articles from the Knowledge Management system to help you answer your caller's inquiry. There are two methods you can use to access articles from the Customer 360 screen:

- Click a book icon to access targeted articles
- Search for articles in the Knowledge Management system

Book icons in the Customer 360 screen provide you with access to Knowledge Management articles that have information about specific processes or programs. The placement of these icons within Customer 360, along with the articles that appear when you click on them, is determined by the Customer Service Manager using the [Article Configuration](#) page tab.

This image shows an example of a book icon:



To access articles using book icons:

1. Access Customer 360.
2. Locate and click on a book icon. Book icons can be located in the left dashboard area, the usage graph, and within steps associated with the Start Service and Payment Arrangement process flows. Contact your manager to identify specific locations of these icons.
3. The **Article reference** drawer opens on the right side of the screen.
4. Review the information in the article.
5. To view additional articles, you can enter search criteria in the **Ask a question** field at the top of the drawer, and hit **Enter**.
6. Your search results appear in the drawer. Click the title of an article to view it.
7. Optionally, you can rate an article by clicking the star that represents how useful the article was. For example, if the article was very useful, click the fifth star. If the article was not useful at all, click the first star.
8. Click the **Back to search results** link at the top of the drawer to return to your search list, or click the **X** at the top right to close the drawer.

To search the Knowledge Management system for additional articles:

1. Access Customer 360.
2. Type *Search Knowledge Management* in the **Search** field and select the **Search Knowledge Management** option.
3. In the Knowledge Management screen, which opens in a new tab, enter your search text in the **Ask a question** field, and hit **Enter**.
4. Select an article from the search results.
5. Review the information in the article.

6. Optionally, you can rate an article by clicking the star that represents how useful the article was. For example, if the article was very useful, click the fifth star. If the article was not useful at all, click the first star.
7. Close the browser tab when you are finished.

Viewing Activities

When you access Customer 360, you can view specific interactions that the utility has had with the contact and associated billing accounts. By default, you can view history in six-month increments going back up to three years in the past. You use the date picker calendars to determine the date range that is displayed.

The Activity panel displays a record for each of the following types of interactions:

- **Calls:** Call activity records for both inbound and outbound calls are displayed only if you are using a [CTI integration](#). When you click on a call activity record, the system displays the name of the agent that took the call, the date and time of the call, and if available, the call resolution and wrap up notes. For customers that have multiple billing accounts, calls in the activity feed are filtered to display only the calls that are associated with the billing account you are viewing.
- **Chats:** Chat activity records display the name of the agent that replied the chat, the customer that started the chat, the date and time of the chat, and if available, the chat resolution and chat transcript. For customers that have multiple billing accounts, chats in the activity feed are filtered to display only the chats that are associated with the billing account you are viewing.
- **Email:** Email activity records show the date and time on which an email was sent, the to and from email addresses, and the subject line in the activity feed. When you click on the email, you can view the body of the email.
- **Self-Service Task:** Self-service task records show interactions that were completed by contacts using self-service methods. When you click on a self-service activity record, the system displays details about the task.
- **Bill:** A bill record displays the date and amount a bill issued on the billing account. Many bills can be produced for the billing account over time. Bills charge for the utility services and products supplied to a customer.
- **Payment:** Payment records show all payments that have been made on the billing account. When you click on a payment activity record, the system displays the date and amount of the payment.

- **Service Request:** Service request records show all open, closed, an in-progress service requests associated with the billing account. The activity feed displays the service request title, status, severity, and category. When you click on a service request activity record, the system opens the service request in the Oracle Fusion Service system.
- **Customer Contact:** Customer contact records show all instances of when the contact has contacted the utility. These records typically represent interactions that occurred before a CTI integration was put in place, or if no CTI integration is available. When you click on a customer contact activity record, the system displays information about the activity in your Oracle Utilities customer information system.
- **Service Orders:** Service order activities represent specific requests to perform work at service point locations. These activities orchestrate the steps necessary to fulfill the request, based on the current state of the related service point. For example, the system creates an Enable Service activity when a new service request is made. This activity examines the current state of the service point, and creates one or more additional activities, as needed. The activities can be dispatched to work in the field or performed via automated smart meter command activities.
- **Field Activities:** Field activities are specific types of tasks performed by utility field personnel. For example, manual installation of a physical meter. Once created, field activities are sent to a field work system, where they are scheduled and assigned to a field work crew. When the task is completed by the crew, the field work system sends a response, and the field activity is updated.

By default, the activity list displays all of these activity types for the configured period of time. You can use the Filter By button to refine your activity list to specific categories, or use the date fields to search for activity that occurred over a more specific time frame within the default configured time frame. For example, if your system is set up to display activity within the last three years, you cannot search for activities that happened more than three years ago.

To view activities from Customer 360:

1. Access Customer 360.
2. Optionally, if your customer has multiple billing accounts, [select the billing account](#) you want to view.
3. View all items in the Activity panel at the right of the screen.

4. To filter records by activity type, click the **Filter By** button, click on the activity types that you want to view so that only those activities that you want to view have a check mark next to them, and then click **Apply**.
5. To filter records by date range, click the **Date Range** button, use the calendars to select a date range of six months or less within the last three years, and then click **Apply**.
6. The system displays all activity records that match your filter criteria. You can scroll down the list to view each activity.
7. Click on an activity to view additional details or to access the record.
8. To clear filters or data range search criteria, click either the **Filter By** or **Date Range** buttons, and then click **Reset**. The search results then include all records for the past three years.

Create a Service Request from Customer 360

You can create a service request directly from Customer 360 and automatically associated it with the billing account you are viewing. When you create a service request, the system opens the Create Service Request drawer directly in Customer 360, which you use to quickly generate a service request by completing a minimal number of fields. The values and options that are available in this drawer are determined by your Oracle Fusion Service settings.

For additional information, see the following topics in the Oracle Fusion Service Help Center:

- [How to Manage SmartText Entries](#)
- [Service Request Categories](#)
- [Work Assignment and Routing](#)

To Create a Service Request from Customer 360:

1. Access Customer 360 and [select the appropriate billing account](#).
2. Enter **Create service request** in the **Quick Action (What would you like to do?)** bar at the top of the screen, and then select the option to create a service request.
3. The system opens the **Create Service Request** drawer.

4. The following fields are automatically populated:

- Billing Account ID
- Primary Contact (not populated for commercial accounts)
- Premise

5. For service requests associated with commercial accounts:

- **Primary Contact:** Select a name from the list, or click the + button to create a new contact.

If you create a new contact, the system brings you to the Oracle Digital Sales system, where you can create and save a contact. After you save your new contact, you must exit the **Create Service Request** drawer and start over for the new contact to appear in the list. For information about using the Contact Page, see the Accounts and Contacts chapter in the [Using Digital Sales Guide](#).

6. Complete the following for all service requests:

- **Title (Required):** Specify a title for the service request.
- **Problem Description:** Specify the details related to the service request.

Note that if your organization has implemented SmartText in the Fusion Service system, you can enter #<text> to find SmartText options to help you complete this field.

- **Category:** Select a category or leave this field blank.
- **Severity:** Select an option, or use the default value of **Low**.
- **Assign To:** Specify a person to assign to the request or leave this field blank.

7. Click **Create** at the bottom of the drawer. A message appears at the top of the screen confirming the creation of the service request.

8. Click the **View Service Request** link in the confirmation message to view or edit the service request in Oracle Fusion Service. See Service Requests in the [Using Service Center in the Classic User Experience Guide](#) for additional information.

9. Optionally, complete the steps to add additional billing accounts, premises, or service contracts to the service request. See [Edit Billing Accounts on a Service Request](#).

Note that you can also use these steps to add the initial billing account to your service request if the connection to your customer information system is interrupted at the time your service request is created.

Setting Communication Preferences

When working with a caller, you can access their communication preferences so you can edit, add, or delete contact methods, and enroll them in utility programs.

You can access the communication preferences in two ways:

- From the Customer 360 screen, with the desired billing account displayed, use the Quick Action bar to access the Set Communication Preferences screen.
- From the Person and Premise Search tab, use the **Update Communication Preferences** option from the action menu on the record you want to update. This option is not available for premises, or for contact and account records that exist only in the Oracle Sales or Fusion Service systems.

The Set Communication Preferences screen includes the following sections:

- **Contact Methods:** Use this section of the screen to add new contact methods or edit and delete existing contact methods. Contact methods include items such as phone numbers and email addresses.
- **Mailing Address:** Use this section of the screen to enter and edit physical addresses where paper communications are delivered. These can include mailing, premise, and seasonal addresses.
- **Notification Preferences:** Use this section of the screen to enroll contacts in utility notifications and specify which contact methods to use for each notification type.

Managing Contact Methods

Each utility contact must have at least one contact method associated with their billing account. Contact methods can include:

- Phone numbers
- Email addresses
- Social networks
- Websites
- SMS (Short Message Service)
- Telex
- EDI (Electronic Data Interchange)
- Electronic file transfer

Utilities can determine which of these communication types is available in CX for Utilities Agent Service during the implementation and configuration process. Additionally, each contact method has types. For example, you can specify that a phone number is one of these types:

- Home phone
- Work phone
- Assistant phone
- Home business phone
- Collections phone
- Emergency phone
- Fax number

When a communication method is added, the first record for a particular method is always marked as the primary contact method. For example, if the billing account has only one email address on file, that email address is marked as the primary email contact. If there are multiple records for a contact method, you can specify which of those records is the primary record. You cannot delete a primary contact method.

To add a contact method:

1. Use one of these methods to access the Set Communication Preferences page:
 - Access Customer 360 and in the **Search** field, type **Update Communication Preferences**, and then select the option that displays below the field.
 - From the Person and Premise Search tab, [search for the record you want to update](#) and then select **Update Communication Preferences** from the **Actions** menu.
2. The system opens the Set Communication Preferences page in a new window.
3. In the Contact Methods section of the screen, click the **+ Add Contact Method** button.
4. Select a value from the **Contact Method** field.
5. Enter the contact method details in the field(s) below the Contact Method field. The fields that appear here differ, depending on the contact method that you select. For example, if you select Phone, you can then enter the phone type, country code, area code, phone number, and extension.
6. To mark the record as the primary contact method, click the **Primary** option to turn it on. Note that if the record you are adding is the only contact method of this type (for example, the only phone number record), the system automatically marks it as the primary contact method.
7. Click **Add** to save your changes.

To edit or delete a contact method:

1. Use one of these methods to access the Set Communication Preferences page:
 - Access Customer 360 and in the **Search** field, type **Update Communication Preferences**, and then select the option that displays below the field.
 - From the Person and Premise Search tab, [search for the record you want to update](#) and then select **Update Communication Preferences** from the **Actions** menu.
2. The system opens the Set Communication Preferences page in a new window.
3. To edit an existing contact method record, in the Contact Methods section of the screen, click the **Edit** icon next to the record you want to edit. The system displays the contact method details. Edit them as necessary, and then click **Update**.
4. To delete a contact method record, click the **Delete** icon next to the record you want to delete, and then click **Continue** on the **Delete contact method** window. Be aware that you cannot delete a contact method record that is marked as a primary contact method.

Managing Mailing Addresses

You use the Mailing Address section of the form to specify physical addresses associated with the billing account. Addresses can include:

- **Premise address:** Can have only one designated premise address per billing account. If no additional mailing address is present, the premise address is used as the mailing address.

Be aware that a billing account can have multiple service contracts, and therefore, multiple premises. Unless otherwise specified, the premise where service was most recently started is the designated premise address for the billing account.
- **Mailing address:** Can have only one overriding mailing address.
- **Seasonal address:** Can have multiple seasonal addresses, which are used as the mailing address between the specified start and end dates for that address. If there are multiple seasonal addresses, they cannot have overlapping date ranges.

You can enter multiple addresses in the communication preferences, and one of those records must be set as the primary address. The premise address is required and is set as the primary mailing address by default. You cannot edit or delete a premise address.

If the premise address is not where the caller wants their communications sent, you can enter a mailing address, and mark it as the primary address. All communications sent through the mail are sent to this primary address. You cannot delete an address that is marked as the primary address.

You can also identify one or more seasonal addresses. For example, a caller says they will be living in their lake house for the summer, and they want their paper communications sent to their lake house during June, July, and August. You can enter the lake house address as a seasonal address and specify the dates during which this address should be used as the primary mailing address. You can enter multiple seasonal addresses, but they cannot have overlapping date ranges. Seasonal addresses are automatically marked as the primary address during the time period they are active. In this example, the lake house address would automatically become the primary mailing address every year during June, July, and August.

To add an address:

1. Use one of these methods to access the Set Communication Preferences page:
 - Access Customer 360 and in the **Search** field, type **Update Communication Preferences**, and then select the option that displays below the field.
 - From the Person and Premise Search tab, [search for the record you want to update](#) and then select **Update Communication Preferences** from the **Actions** menu.
2. The system opens the Set Communication Preferences page in a new window.
3. In the **Mailing Address** section, click the **Add Address** button, and select one of the following options. Be aware that if a mailing address already exists, you will not have the option to add another mailing address.
 - **Mailing address**
 - **Seasonal address**
4. The **Address Details** section of the form opens. Complete these fields and then click **Add**:

- **Start Date: Date** (seasonal address only)
- **Start Date: Month** (seasonal address only)
- **End Date: Date** (seasonal address only)
- **End Date: Month** (seasonal address only)
- **Country/Region**
- **Address Line 1**
- **Address Line 2**
- **City**
- **State**
- **Postal Code**

5. To mark one of the addresses as the primary address, click the Actions menu on the address you want to select, and then select **Set as Primary**.

To edit, delete, or deactivate an address:

1. Use one of these methods to access the Set Communication Preferences page:
 - Access Customer 360 and in the **Search** field, type **Update Communication Preferences**, and then select the option that displays below the field.
 - From the Person and Premise Search tab, [search for the record you want to update](#) and then select **Update Communication Preferences** from the **Actions** menu.
2. The system opens the Set Communication Preferences page in a new window.
3. To edit an existing address, in the Mailing Address section of the screen, click the **Edit** icon next to the record you want to edit. The system displays the address details. Edit them as necessary, and then click **Update**.

4. To delete an address record, click the **Delete** icon next to the record you want to delete, and then click **Continue** on the Delete contact method window. Be aware that you cannot delete an address that is marked as a primary address unless it is a seasonal address, and another address exists.
5. To mark an address as active or inactive, click the **Action** menu on the record you want to delete, and then select **Make address active** or **Make address inactive**. Be aware that you cannot deactivate a primary address. Also, in some cases, making an address active will cause that address to be the primary address.

Managing Notification Preferences

You use the Notification Preferences section of the form to specify whether the contact is notified about specific types of information, and if so, what contact method is used for the notification. To add a contact method to a notification, that contact method must already exist for the contact. You can set notification preferences for any subscription-based notification types that are configured in your Oracle Utilities customer information system. Contacts must sign up to receive these notifications.

These are some examples of notification types that can be implemented:

- Credit and Collections
- Programs and Offers
- Service Advisory
- Bill Due
- Bill Ready
- Bill Routing Email
- Late Payment
- Payment Received

To set up notifications, you click the Enroll and add contact link next to an item. You then specify the contact method that should be used for that notification type. You can edit the notification preferences or turn them off by removing the contact method from the notification type. Be aware that some notifications are mandatory and cannot be removed.

To learn more about notifications, see *Setting Up Notification Preference Options* in the Administrative User Guide associated with your Oracle Utilities system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

To enroll in a notification:

1. Access Customer 360.
2. In the **Search** field, type Update Communication Preferences, and then select the option that displays below the field.
3. The system opens the Set Communication Preferences page in a new window.
4. In the Notification Preferences section of the screen, click the **Enroll and add contact** link next to the notification you want to set up.
5. In the **Send To** field, select from a list of valid contact method records.
6. Be aware that notification types can be configured to enable users to set additional parameters. For example, a notification can be configured to enable the contact to enter a value in the **Day(s) before notification** field, which controls when the notification is sent. For example, if you want to receive the **Bill Due** notification type 4 days before the billing due date, enter **4** in this field.
7. Click the **Enroll** button to save your changes.

Sending Emails from Customer 360

Occasionally, you might need to send an email to a caller to provide them with requested details about their billing account, upcoming service call, or payment history. Using the Quick Action (What would you like to do?) bar in Customer 360, you can easily access a Send Email interface that enables you to create and send an email directly from Customer 360.

To send an email from Customer 360:

1. Access Customer 360.
2. In the **Quick Action (What would you like to do?)** bar at the top of the screen, type **Send Email** and then select the Send Email option.
3. Set the **Channel Type** and **Channel** fields to Email.
4. Enter one or more email addresses in the **To** field. Alternatively, you can type in a name and the system provides a list of contacts that match your entered text. You can then select a contact record to add them to the email.
5. Optionally, click the **Cc** or **Bcc** links and then enter or search for additional email addresses to copy or blind copy another party on the email.
6. Enter subject text in the line below the **To** field.
7. Enter the content of your email and format it using the available buttons.
8. If needed, click the **paper clip** icon at the bottom to attach files to the email.
9. Click **Send**.
10. The system displays a message to confirm that the message has been sent and adds a record of the email to the activity feed.

Enrolling Customers in Payment Plans

When a customer has difficulty paying their bill on time, or has a past due balance, they might call in to inquire about payment plan options. Using the Create Payment Plan feature, you can access the payment plan workflow area that enables you to determine customer eligibility and view available payment plan options.

Pay Plan Interview rules that are defined using the Oracle Intelligent Advisor system are used during the flow to validate the customer's billing account information against the eligibility rules of your utility. For example, your utility might require customers to have a credit rating above 600 to be eligible for a payment plan.

The interview rules are also used to create payment plan options based on the rules of your utility. For example, your utility might define the preferred payment plan as:

- **Payment 1:** 50% of the past due balance is due immediately.
- **Payment 2:** Half of the remaining past due balance is due one month after the first payment.
- **Payment 3:** The remainder of the past due balance is due one month after the second payment.

Use the information provided to discuss the plan options with the customer and help them select a plan that works best for them. After you select a plan you can then:

- Enroll the customer in a predefined payment plan
- Create a custom payment plan for the customer

The create payment plan feature is available only for utilities that use the Oracle Intelligent Adviser system. See [Oracle Intelligent Advisor Implementation Tasks](#) for additional information.

Selecting a Payment Plan

1. Access Customer 360.
2. In the **Quick Action (What would you like to do?)** bar at the top of the screen, start typing **Create Payment Plan** and then select the **Create Payment Plan** option.
3. In the Account Confirmation section of the screen, verify the account number, and then click **Next**.
4. In the Account Analysis section of the screen, review the information in the Eligibility section to determine whether the customer is eligible for a payment plan.
5. If the customer is not eligible for a payment plan, the reasons are listed with **Ineligible** badges next to them. Discuss these reasons with the customer and then click the **Return to Customer 360** button at the top of the page to exit.

6. If the customer is eligible, the plans they qualify for are displayed on the screen, with the recommended plan listed first.
7. Discuss the payment plan options with the customer to determine which plan to select, and then continue to one of these tasks below:
 - Enrolling a customer in a predefined plan
 - Creating a custom payment plan

Enrolling a Customer in a Predefined Plan

1. Complete the steps in the *Selecting a Payment Plan* task above.
2. At the bottom of the screen, select the predefined payment plan that the customer wants to enroll in from the **Select a pay plan to create** field.
3. Select the method of payment in the **Select a payment method** field and then click **Next**.
4. On the Plan Confirmation screen, verify the payment plan details with the customer.
5. If the customer accepts the plan, click the **Return to Customer 360** button at the top of the screen to exit the payment plan process.

If the Customer does not accept the terms of the plan, click the **Back** button to review and select a new plan, and then complete these steps again.

6. After the customer has selected a plan, the account balance is updated to reflect the new payment plan and a record is added to the activity history for the customer, noting that a payment plan was created on this date.

Creating a Custom Payment Plan

1. Complete the steps in the *Selecting a Pay Plan* task above.
2. At the bottom of the screen, select **Custom** in the **Select a pay plan to create** field.
3. Select the method of payment in the **Select a payment method** field and then click **Next**.

4. The Allocate Payments screen appears, with a default payment schedule that includes three payments.
 1. To add additional payments to the schedule, click the **Add Payment Schedules** button.
 2. To remove payments from the schedule, click the **Delete** button on the payment.
5. Expand each payment row and specify the amount and date associated with the payment.

Be aware that the total amount of all payments in the schedule must match the amount displayed in the **Total payments** field above the schedule.
6. On the Plan Confirmation screen, verify the payment plan details with the customer.
7. If the customer accepts the plan, click the **Return to Customer 360** button at the top of the screen to exit the payment plan process.

If the Customer does not accept the terms of the plan, click the **Back** button to review and select a new plan, and then complete these steps again.
8. After the customer has selected a plan, the account balance is updated to reflect the new payment plan and a record is added to the activity history for the customer, noting that a payment plan was created on this date.

Using the Customer Dashboard

You use the Customer Dashboard to manage utility billing account information and transactions. The Customer Dashboard is available for contacts and prospects who are linked to one or more billing accounts, and not for contacts or accounts that exist only in the Oracle Fusion system or for vacant premises.

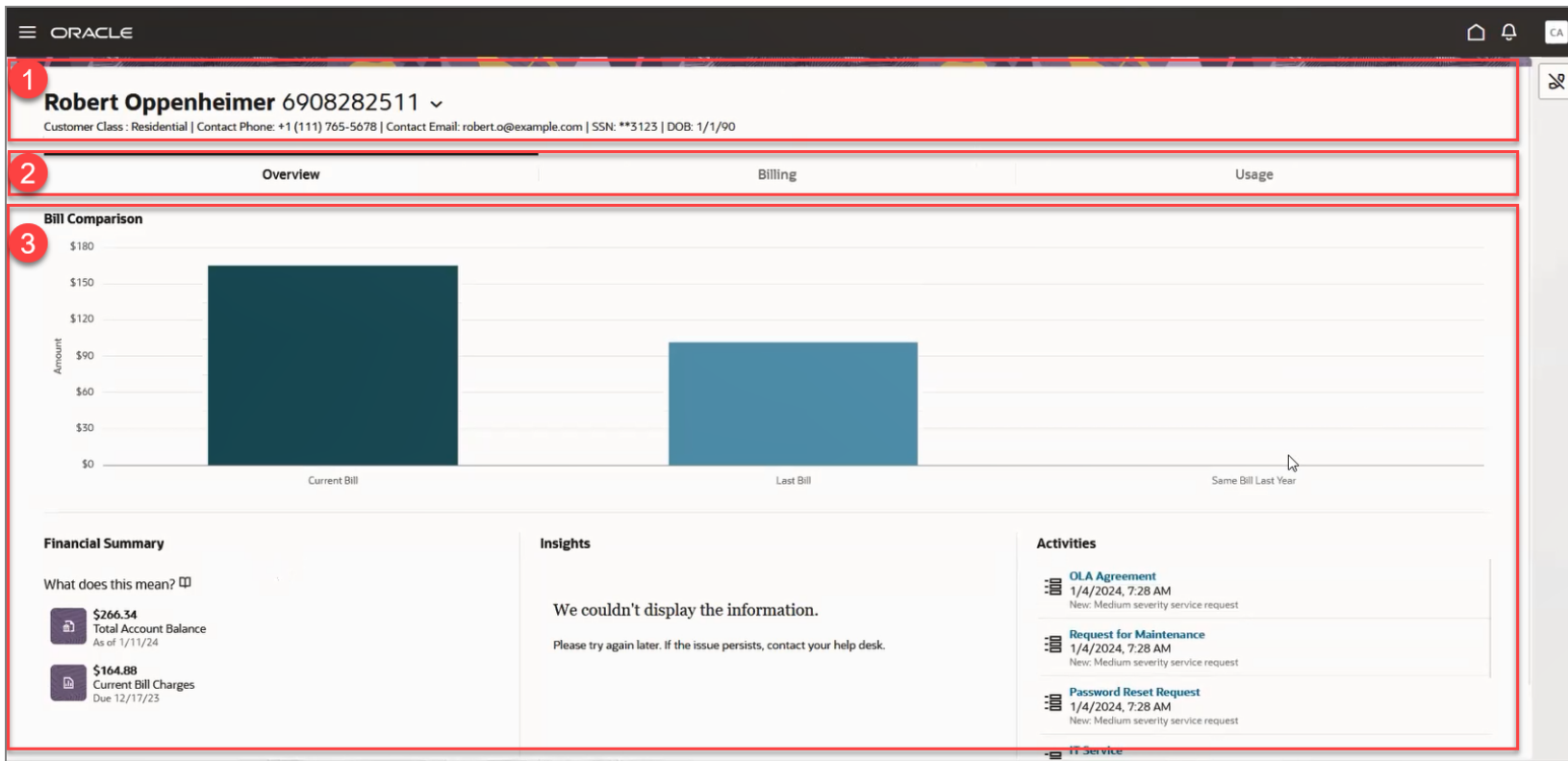
You access the Customer Dashboard by searching for a customer in the Person and Premise Search page tab, and then clicking on the Customer or Prospect hyperlink.

Clicking a Customer link directs you to the Customer Dashboard. However, clicking a Prospect link will take you to the Customer Dashboard only if the prospect was previously attached to a utility billing account. Otherwise, clicking the Prospect link will take you to the Oracle Fusion Account page.

After accessing the Customer Dashboard, you can complete these tasks:

- View basic information about the account
- Compare the current bill to previous bills
- View financial insights
- View account insights and warnings
- View activities
- View and manage billing information
- View and manage usage information

This image identifies the key areas of the Customer Dashboard screen:



This table describes the main areas of the Customer Dashboard:

Page Area	Description
1. Account Header	<p>The account header provides you with basic information about the entity or account you are viewing. This information can include:</p> <ul style="list-style-type: none"> Contact name

Page Area	Description
	<ul style="list-style-type: none"> ▪ Billing account number ▪ Customer class ▪ Contact phone ▪ Contact email ▪ Personal identifiers, such as date of birth or social security number. <p>If the contact you are viewing is attached to multiple utility billing accounts, an arrow appears next to the Account field that enables you to select the billing account you want to view.</p>
2. Tabs	<p>Each tab in the Customer Dashboard provides you with different information. The tabs include:</p> <ul style="list-style-type: none"> ▪ Overview tab: Displays basic information about the account's current status. This tab is available for all contacts, regardless of whether they are attached to a billing account. However, the information displayed on the tab changes based on whether a billing account exists. ▪ Billing tab: Displays billing history for the selected billing account. ▪ Usage tab: Displays usage history for the selected billing account.
3. Work Area	<p>After you select a tab, the work area of the screen displays different information, and you can perform different tasks.</p>

Page Area	Description
	<p>Tasks you can complete on the Overview tab include:</p> <ul style="list-style-type: none"> ▪ View basic information about the account ▪ Compare the current bill to previous bills ▪ View financial insights ▪ View account insights and warnings ▪ View activities <p>Tasks you can complete on the Billing tab include:</p> <ul style="list-style-type: none"> ▪ View the billing history chart ▪ View financial history details for bills, bill segments, payments, and adjustments. <p>Tasks you can complete on the Usage tab include:</p> <ul style="list-style-type: none"> ▪ Use the Usage Comparison Chart to view and compare usage data.

Using the Account Header

You use the account header in the Customer Dashboard to view basic information about the entity or account you are viewing. This information can include:

- Contact name
- Billing account number

- Customer class
- Contact phone
- Contact email
- Personal identifiers, such as date of birth or social security number.

If the contact you are viewing is attached to multiple utility billing accounts, an arrow appears next to the Account field that enables you to select the billing account you want to view.

Accessing Multiple Accounts from the Customer Dashboard

Some contacts have multiple billing accounts with a utility. For example, a contact might have a primary residence and a vacation home, each with a separate billing account. You can view all of the billing accounts associated with a contact from the Customer Dashboard.

To Access Multiple Billing Accounts from the Customer Dashboard:

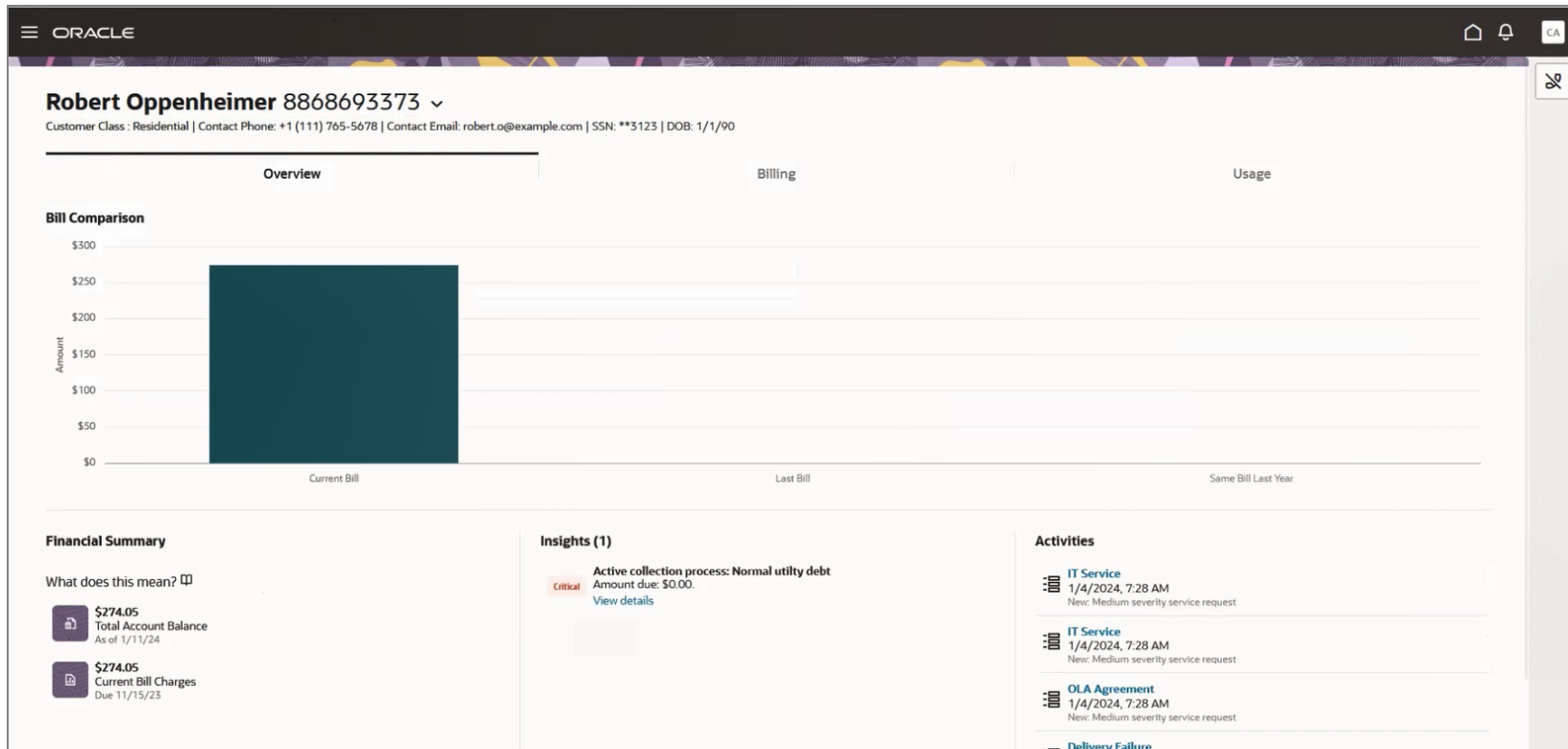
1. Access the Customer Dashboard by selecting a record from the Person and Premise Search.
2. Click the arrow next to the person's name to display all of the associated billing accounts. If there is no arrow next to the name, the contact has only one billing account.
3. Click on the billing account you want to view.
4. The system displays the information for the selected billing account.

Using the Overview Tab

You use the Customer Dashboard Overview tab to view basic information about the account's current status. Tasks you can complete on this tab include:

- Compare the current bill to previous bills in the Billing Comparison chart
- View details about the bills displayed in the chart
- View financial insights
- View and access account insights and warnings
- View and access activity details

This image shows an example of the Overview tab:



Using the Bill Comparison Chart

The **Bill Comparison** chart is the first component on the Overview tab. This chart allows you to compare a customer's current bill to their previous bill and to the corresponding bill from the same time period the previous year.

When you hover over a bar in the chart, you can view the date and amount associated with the bill. If you click on a bar, the **Bill Issued** drawer opens on the right side of the screen and provides details about the bill. You can then click on specific bill segments to view additional details.

This image shows an example of the Bill Issued drawer:

Bill Issued 12/1/2023, \$266.34 ×
ID: 690009828065

Bill Information

Bill Due: 12/18/2023 Bill Period: 31 Days (10/20 - 11/20)
Number of Days in Period: 31

Bill Summary

Previous balance	\$101.46
Total payments	\$0.00
Total adjustments	\$0.00
Total current billing charges	\$164.88
Ending balance this period	\$266.34

Bill Segments

Frozen ⌵

California / Electric Residential - TOU Rate
Period: Oct 20, 2023 - Nov 19, 2023
Current Amount: \$164.88
Rate Plan Code: ER-TOU1
Premise Address: House 345, km St, San Francisco, CA, 94102

To View Bill and Bill Segment Details:

1. Access the Overview tab of the billing account associated with the bill you want to view.
2. Click on a bar in the **Bill Comparison** chart.
3. The system displays the **Bill Issued** drawer on the right side of the screen, which includes:
 - Bill Issued Date
 - Bill ID
 - Bill Due Date
 - Bill Period
 - Number of Days in Period
 - Previous Balance
 - Total Payments
 - Total Adjustments
 - Total Current Billing Charges
 - Ending Balance for This Period
 - A card for each bill segment, or group of bill segments, included in the bill.
4. To view details about the bill segments included in the bill, click on a bill segment or bill segment group card.

If there are more than 10 bill segments in the selected bill, the system groups the bill segments by service type, and displays segment group cards instead of individual bill segment cards.
5. The system displays the **Bill Segment** drawer, which includes a search bar and a card for each of the selected bill segments. Information on the cards includes:

- Bill Segment Name
- Bill Segment ID
- Status
- Premise Address
- Current Amount
- Rate Plan Code
- Service Quantity
- A detailed list of the bill segment calculations

6. Use the search bar to locate and view other bill segments.

Note that if you selected a bill segment group to access the **Bill Segment** drawer, you can only search for bill segments associated with that service type. You can search by address, rate plan, or amount.

7. Click the bill segment to view the bill segment detail. The system displays:

- Segment Name
- Segment ID
- Premise Address
- Status
- Current Amount
- Rate Plan Code
- Service Quantity
- Bill Segment Calculations

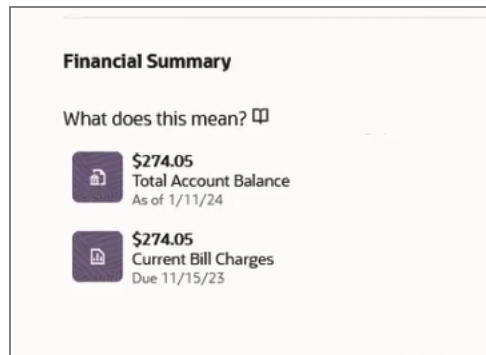
8. To return to the **Bill Segment** drawer, click the < button at the top.
9. To return to the **Bill Issued** drawer, click the < button at the top again.
10. To close the drawer at any time, click the X at the top.

Viewing Financial Summary Information

You can use the **Financial Summary** section of the Overview tab to get an at-a-glance view of the customer's current financial situation. This section provides you with financial insights that include:

- **Total account balance:** This insight includes the current amount owed by the customer as of the current date.
- **Total bill charges:** This insight includes the charges associated with the current bill, and indicates when the bill is due.

This image shows an example of the Financial Summary section:



Viewing Account Insights

The **Insights** section of the Overview tab provides you with lists of insights associated with the billing account you are viewing. The heading of the section includes the number of insights currently associated with the account. Insight types include:

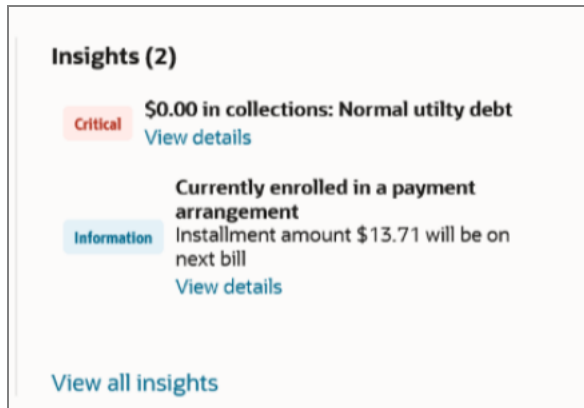
- **Collections insights:** These insights are displayed for accounts that are currently in the collections process. These insights are all listed with a status badge of **Critical**, and they include the amount due. To view additional information, you can click

on the **View details** link, which directs you to your Oracle Utilities customer information system.

- **Payment arrangement insights:** These insights are displayed for accounts that are currently enrolled in a payment arrangement. These insights are all listed with a status badge of **Information**, and they include the amount of the payment arrangement that will be included in the next bill. To view additional information, you can click on the **View details** link, which directs you to your Oracle Utilities customer information system.

If there are no insights to display for the customer, the section displays a message that the account has no insights. If there are multiple insights, the **View all insights** link appears at the bottom of the insight list. You can click this link to open the **Insights** drawer, which lists all available insights for the account.

This image shows an example of the Insights section:



To view account insights:

1. View the Insights section of the **Overview** tab to determine if there are any insights for the account.
2. If there are more than 4 insights, click the **View all insights** link at the bottom of the list to open the **Insight** drawer on the right side of the screen. Click the **X** at the top right of the drawer to close it.

3. Whether in the **Overview** tab or in the **Insight** drawer, click the **View details** link on an insight to view details in your Oracle Utilities customer information system. The system opens a new tab to display your information. For additional information about how to manage collections or payment plans, see the [documentation for your Oracle Utilities customer information system](#).
4. When you are finished, close the tab to return to the **Customer Dashboard**.

Viewing Customer Activity

When you access the Customer Dashboard, you can view specific interactions that the utility has had with the customer. The Activity panel displays the most recent interactions, and includes a **View all activities** link at the bottom. Activities that display here include:

- **Calls:** Call activity records for both inbound and outbound calls are displayed only if you are using a [CTI integration](#). When you click on a call activity record, the system displays the name of the agent that took the call, the date and time of the call, and if available, the call resolution and wrap up notes. For customers that have multiple billing accounts, calls in the activity feed are filtered to display only the calls that are associated with the billing account you are viewing.
- **Chats:** Chat activity records display the name of the agent that replied the chat, the customer that started the chat, the date and time of the chat, and if available, the chat resolution and chat transcript. For customers that have multiple billing accounts, chats in the activity feed are filtered to display only the chats that are associated with the billing account you are viewing.
- **Email:** Email activity records show the date and time on which an email was sent, the to and from email addresses, and the subject line in the activity feed. When you click on the email, you can view the body of the email.
- **Self-Service Task:** Self-service task records show interactions that were completed by contacts using self-service methods. When you click on a self-service activity record, the system displays details about the task.
- **Bill:** A bill record displays the date and amount a bill issued on the billing account. Many bills can be produced for the billing account over time. Bills charge for the utility services and products supplied to a customer.
- **Payment:** Payment records show all payments that have been made on the billing account. When you click on a payment activity record, the system displays the date and amount of the payment.

- **Service Request:** Service request records show all open, closed, an in-progress service requests associated with the billing account. The activity feed displays the service request title, status, severity, and category. When you click on a service request activity record, the system opens the service request in the Oracle Fusion Service system.
- **Customer Contact:** Customer contact records show all instances of when the contact has contacted the utility. These records typically represent interactions that occurred before a CTI integration was put in place, or if no CTI integration is available. When you click on a customer contact activity record, the system displays information about the activity in your Oracle Utilities customer information system.
- **Service Orders:** Service order activities represent specific requests to perform work at service point locations. These activities orchestrate the steps necessary to fulfill the request, based on the current state of the related service point. For example, the system creates an Enable Service activity when a new service request is made. This activity examines the current state of the service point, and creates one or more additional activities, as needed. The activities can be dispatched to work in the field or performed via automated smart meter command activities.
- **Field Activities:** Field activities are specific types of tasks performed by utility field personnel. For example, manual installation of a physical meter. Once created, field activities are sent to a field work system, where they are scheduled and assigned to a field work crew. When the task is completed by the crew, the field work system sends a response, and the field activity is updated.

When you click the **View All Activities** link, the **Activities** drawer opens on the right of the screen, and includes a longer list of activities.

You can use the **Filter By** button to refine your activity list to specific categories. For example, you might want to search for calls only to verify something the customer said occurred during a previous call.

By default, the list displays activity records in six-month increments for the past three years. You can use the **Date Range** button to enter a more specific time frame. For example, if your system is set up to display two years of historical data, you cannot search for activities that happened more than two years ago.

This image shows an example of the **Overview** tab with the **Activities** drawer displayed:

The screenshot displays the Oracle Customer Dashboard interface. The main content area is divided into several sections:

- Overview**: Contains a 'Bill Comparison' bar chart showing 'Current Bill' and 'Last Bill' amounts.
- Financial Summary**: Shows 'Total Account Balance' as \$0.00 and 'Current Bill Charges' as \$274.05.
- Insights (2)**: Lists two insights, including a critical one about '\$0.00 in collections: Normal utility debt' and an information one about a payment arrangement.
- Activities**: A list of recent activities such as 'IT Service', 'OLA Agreement', and 'Delivery Failure'.

 An 'Activities' drawer is open on the right side, featuring a 'Filter by' button, a 'Date Range' selector, and a list of activity types with checkboxes. The 'Apply' button is highlighted.

To view activities from the Customer Dashboard:

1. Access the Customer Dashboard and select the Overview tab.
2. View the most recent activities in the **Activities** section, or click the **View All Activities** link to open the **Activities** drawer on the right of the screen.
3. To filter records by activity type, click the **Filter By** button, click on the activity types that you want to view, and then click **Apply**.

4. To filter records by date range, click the **Date Range** button, use the calendars to select a date range of six months or less within the last three years, and then click **Apply**.
5. The system displays all activity records that match your filter criteria. You can scroll down the list to view each activity.
6. Click on an activity to view additional details or to access the record.
7. To clear filters or date range search criteria, click either the **Filter By** or **Date Range** buttons, and then click **Reset**. The search results then include all records for the time frame configured by your utility.

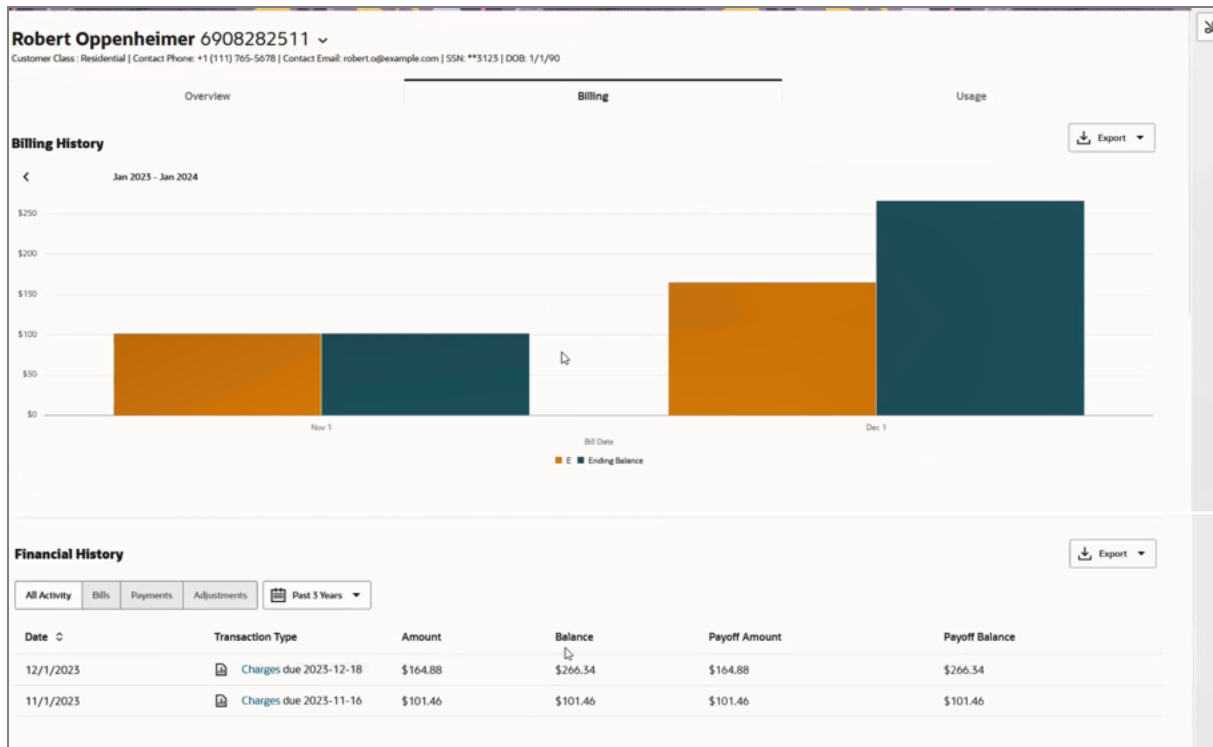
Using the Billing Tab

To answer customer inquiries or determine how to best service a customer, you might need to view information about their utility bills. Once you have accessed a billing account in the Customer Dashboard, you can use the Billing tab to view and analyze billing history data and trends.

Billing account information is displayed in the following sections:

- **Billing History:** This section of the Billing tab displays a chart that represents the billing history for the selected account. For each bill period, there are two bars. The first bar can include multiple sections, which represent the amounts associated with each service type included on the bill. The second bar represents the ending balance for that bill. You can use the arrows above the chart to scroll through different date ranges. You can also click on the bars to display additional details.
- **Financial History:** This section of the Billing tab displays a record for each bill, payment, and adjustment associated with the billing account over the selected time period. You can view all financial history records, or filter the list to display only bills, payments, or adjustments. You can also specify a time period to display. When you click on a record in this list, the system displays detailed information about the transaction.

You access this tab by selecting a customer or prospect from the Person and Premise Search, and then selecting the Billing tab. This image shows an example of the Billing tab:



Using the Billing History Chart

The **Billing History** chart provides you with an at-a-glance view of the customer's billing history.

To Use the Billing History Chart:

1. From the Customer Dashboard, select the **Billing** tab.
2. In the **Billing History** section of the **Billing** tab, use the < and > buttons above the chart to view the desired date range.

Be aware that the date range available for viewing is configurable and determined by your utility. By default, you can view 3 years of historical data.

3. Hover over a bar to view dates, service types, and billing amount details.
4. Click on a bar to view billing details. For additional information about viewing billing details, see [View Bill Details](#).
5. To export chart data, click the **Export** button at the top of the chart.

Viewing Financial History Details

By default, all financial history records are displayed in the **Financial History** list at the bottom of the **Billing** tab. You can use the filter fields above the list to narrow the results to the type of record or to a specific date range. For example, you can filter by:

- All Activity
- Bills
- Payments
- Adjustments

To view details about a record, click on the hyperlink in the **Transaction Type** column.

To View Financial History Details:

1. On the Customer Dashboard, select the **Billing** tab.
2. Search for and locate a financial history record in the **Financial History** section. To locate a specific record, you can use the following filters:
 - All Activity
 - Bills
 - Payments

- Adjustments
 - Date Range: By default, the financial history date range is set to "All time" and includes all financial history. To specify a custom date range, click on the Calendar, click **Select Custom Date**, enter your date range and then click **Submit**.
3. The system updates to records in the list to reflect your filter selections.
 4. Click on the hyperlink in the **Transaction Type** column.
 5. The system displays one of the following drawers on the right side of the screen, depending on the transaction type of the selected record:
 - Payment drawer
 - Adjustment drawer
 - Bill drawer
 6. To close the drawer, click the **X** at the top.
 7. Continue on to one of these topics to understand the detailed information in the drawers:

Viewing Payment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific payment that was made. You can access payment history details from the **Billing** tab.

To View Payment Details:

1. Access the Customer Dashboard for the billing account you want to review and select the **Billing** tab.
2. Click on a payment record in the **Financial History** section.
3. The system displays the **Payment** drawer on the right side of the screen, which includes:

- Payment Tender
 - Payment ID
 - Payment Amount
 - Payment Status
 - Payment Date
 - Payment Method
 - Payment Segment Distributions
4. To view details about a payment segment distribution for the payment, click on a **Payment Segment** card. Click the **X** at the top to close the payment segment detail.
 5. To close the **Payment Detail** drawer, click the **X** at the top.

Viewing Adjustment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific adjustment. You can access adjustment details from the **Billing** tab.

To View Adjustment Details:

1. Access the Customer Dashboard for the billing account you want to review and select the **Billing** tab.
2. Click on an adjustment record in the **Financial History** section.
3. The system displays the **Adjustment** drawer on the right side of the screen, which includes:
 - The status and title of the adjustment
 - Adjustment ID
 - Adjustment Date

- Bill ID
- Amount
- Status
- Last Bill Issued
- Adjustment Type
- Premise
- Service Agreement
- Financial Details

4. To close the **Adjustment** drawer, click the **X** at the top.

Viewing Bill and Bill Segment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific utility bill. You can use the following methods to access bill and bill segment details from the Billing tab:

- Click on a bar in the **Billing History** chart.
- Click on a bill record in the **Financial History** section.

After you select a bill, you can see detailed information about the bill as a whole, and you can select individual bill segments to view more granular detail. If there are fewer than 10 bill segments on a bill, each segment is listed. If there are 10 or more segments, the system groups the segments by service type. You can click on a segment or group of segments to see the detailed information.

To View Bill and Bill Segment Details:

1. Access the Customer Dashboard for the billing account you want to review and select the **Billing** tab.
2. Complete one of these actions to access bill details:
 - Click on a bar in the **Billing History** chart.
 - Click on a bill record in the **Financial History** section.
3. The system displays the **Bill** drawer on the right side of the screen, which includes:
 - Bill Issued Date
 - Bill ID
 - Bill Due Date
 - Bill Period
 - Number of Days in Period
 - Previous Balance
 - Total Payments
 - Total Adjustments
 - Total Current Billing Charges
 - Ending Balance for This Period
 - A card for each bill segment, or group of bill segments, included in the bill.
4. To view details about the bill segments included in the bill, click on a bill segment or bill segment group card.

If there are more than 10 bill segments in the selected bill, the system groups the bill segments by service type, and displays segment group card instead of individual bill segment cards.

5. The system displays the **Bill Segment** drawer, which includes a search bar and a card for each of the selected bill segments. Information on the cards includes:
 - Bill Segment Name
 - Bill Segment ID
 - Status
 - Premise Address
 - Current Amount
 - Rate Plan Code
 - Service Quantity
 - A detailed list of the bill segment calculations
6. Use the search bar to locate and view other bill segments. Note that if you selected a bill segment group to access the Bill Segment drawer, you can only search for bill segments associated with that service type. You can search by address, rate plan, or amount.
7. Click the bill segment to open the bill segment detail. The system displays:
 - Segment Name
 - Segment ID
 - Premise Address
 - Status
 - Current Amount
 - Rate Plan Code

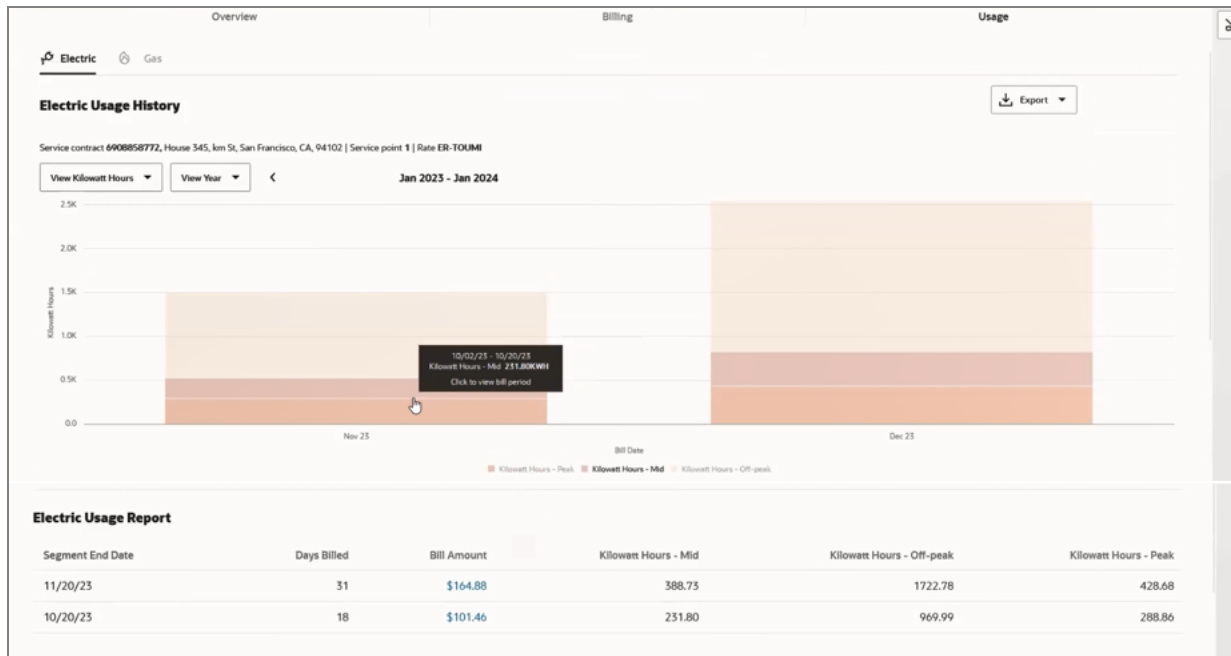
- Service Quantity
 - Bill Segment Calculations
8. To return to the **Bill Segment** drawer, click the < button at the top.
 9. To return to the **Bill** drawer, click the < button at the top again.
 10. To close the drawer at any time, click the **X** at the top.

Using the Usage Tab

You use the **Usage** tab to view historical usage information for a selected billing account. There are two main sections of this tab:

- <Service Type> Usage History Chart
- <Service Type> Usage Report

This image shows an example of the **Usage** tab:



By default, the **Usage History** chart displays usage data for each bill for a single service type. If there are multiple service types, you can click on the sub-tabs above the chart to view other service types. For example, the above screen shows an Electric and a Gas sub-tab.

And you can change your view by:

- Selecting a different sub-tab to view a different service type. For example, select Gas.
- Selecting a different unit of measure. For example, select Kilowatt Hours.
- Selecting a different usage interval. For example, select View Bill Period.
- Using the < and > buttons to change the time period you are viewing.
- Clicking on a bar.

You can also view the service contract number, address, number of service points, and the rate code associated with the account. This information appears above the chart.

You can hover over a bar in the chart to view additional details in a tool tip, or you can click on a bar to change the chart view to a more granular view. For example, if you hover over a bar that represents a bill period, you can click on that bar to view a more detailed chart for that bill period. If available, the chart would then include a bar for each day in the bill period.

Note that you can only access a more detailed chart if the detailed data is available. For example, if hourly data is not available, you can't click on a bar that represents a day to display an hourly chart.

Below the chart, the **Usage Report** displays a list of detailed records about the usage for the selected service contract. You can click on the Billed Amount in any of the records to view the Bill Segment Drawer. See [Viewing Bill and Bill Segment Details](#) for additional information.

To View Usage Details:

1. From the Customer Dashboard, select the **Usage** tab.
2. The system displays the **Usage History** chart at the top of the work area.
3. Use these options to change your display:
 - Select a different service type sub-tab.
 - Select a different option from the Unit of Measure filter.
 - Select a different time period from the View filter.
 - Scroll left and right to display different date ranges.
4. Hover over a bar to view usage details.
5. Click on a bar to display a more detailed chart.

6. Scroll down to the **Usage Report** to view additional usage details.
7. To view bill segment details, click on the **Billed Amount** column for a record in the report. See [Viewing Bill and Bill Segment Details](#) for additional information.

Using the Work Queue

You use the Work Queue to search for, select, and manage service requests and to do tasks. The service requests that appear in your work list are from the Oracle Fusion Service system, and the to do tasks that appear are from your Oracle Utilities customer information system.

This image shows an example of the Work Queue:

The screenshot shows the Oracle Work Queue interface. At the top, there is a search bar and filter buttons for 'Last Updated', 'To Dos', 'Service Requests', and 'Assigned to Me'. Below the search bar is a table with the following columns: Severity, Work Item ID, Title, Name, Billing Account ID, Status, Type, Age in Days, Last Updated, and Actions. The table contains four rows of data:

Severity	Work Item ID	Title	Name	Billing Account ID	Status	Type	Age in Days	Last Updated	Actions
Medium	SR0000061126	Desktop Issue			New		418	1/6/2023, 12:31 PM	...
Low	SR0000065148	sr sample title	Automation_Lisa Pickford_Contact	0896664905	New		21	2/8/2024, 12:04 PM	...
Low	SR0000064153	Adater Test	Automation CX contact Automation KAMBBusiness1		New		27	2/1/2024, 2:28 PM	...
Low	SR0000064148	sr test			New		31	1/29/2024, 10:13 AM	...

At the bottom of the interface, there are navigation buttons for 'Work Queue', 'Person and Premise Search', and 'Knowledge Management'.

You can filter the items shown in the Work Queue tab using filter buttons and search criteria. Filter buttons include:

- **Last Update Date:** Click this filter button to specify a date range for your search.
- **To Dos:** Click this filter button to display only the to do tasks from the Oracle Utilities customer information system that are assigned to you. After you click this filter button, an additional option appears at the bottom of the screen that enables an agent to assign themselves an additional to do task.
- **Service Requests:** Click this filter button to display only the service requests that meet your search criteria. Note that the system shows service requests that are assigned to you or are unassigned.
- **Assigned to Me:** Click this filter button to display only service requests that are assigned to you.

After you click a filter button, it appears in the search bar. You can also add additional search text in the search bar to further refine your search. You can click the **X** next to each item in the search bar to remove it from your search criteria.

To search by billing account ID, you must include the full billing account ID as the first item in your search criteria.

After you have found the record you want to review or manage, you can:

- Use the action menu option to assign the service request to yourself.
Be aware that the system verifies that the service request is not yet assigned to anyone. If it is no longer available for you to assign yourself to it, the system displays a message telling you that you could not be assigned to the service request. When you close the message, the Work Queue list is refreshed, and the Assign to Me option is no longer available.
- Click on the hyperlink to open the record in a new browser tab, where you can continue your work.
- Edit billing account information associated with a service request.

For additional information about working with service requests, see:

- The "Work with Service Requests" topic in the [Oracle Fusion Service library](#).
- [Service Request Implementation Tasks](#) in the *Implementing Customer Experience for Utilities Guide*.

For information about to do tasks, see:

- "To Do Processing" in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).
- [Configuring Your Oracle Utilities System](#) in the *Implementing Customer Experience for Utilities Guide*.

Identifying High-Priority Service Requests and To Dos

When you first access your Work Queue, you might want to view all service requests or to do tasks that need attention. For example, you might want to review all items with a severity of High, or with a status of New.

To identify items that need attention:

1. [Access CX for Utilities Agent Service](#).
2. Select the **Work Queue** page tab.
3. To sort the items to show the highest severity first, click the **Sort** icon next to the **Severity** column heading.
4. To sort the items to show all new requests first, click the **Sort** icon next to the **Status** column heading. Be aware that you can sort by only one column heading at a time.
5. When you have found the service request or to do task you want to view or update, click the hyperlink in the row you want to access.
6. For additional information and instructions on working with service requests, see the "Working with Service Requests" topics in the [Oracle Fusion Service library](#). For information about to do tasks, see "To Do Processing" in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Managing Service Requests and To Dos

As a customer service manager or agent at a utility company, you might need to review and edit service requests and to do tasks.

To manage service requests:

1. [Access CX for Utilities Agent Service](#).
2. Select the **Work Queue** page tab.
3. To view only service requests, click the **Service Requests** filter button.
4. To search for a specific service request, enter text in the **Search** field and then hit **Enter**. You can search by:
 - Billing account ID
To search by billing account ID, you must include the full billing account ID as the first item in your search criteria.
 - Name
 - Service request number
 - Key word included in the service request description
5. To search for service requests that were last updated during a specific date range:
 - Click the **Last Updated Date** button.
 - Specify the date range by manually entering dates, or by using the calendar date picker.
 - Click inside the **Search** field to run the search.
6. Click the **Sort** icon next to one of the column headings. By default, the column is sorted in ascending order. Click the icon again to sort in descending order. Note that you can sort by only one column heading at a time.

7. When you have found the service request you want to view or update, click the service request number, which is a hyperlink. The service request opens in a new browser tab, where you can continue your work. For additional information and instructions on working with service requests, see the "Working with Service Requests" topics in the [Oracle Fusion Service library](#).
8. To return to the Work Queue, close this tab and return to your previous tab. Alternatively, you can click the **Return to Work Queue** button at the top of the service request, which opens an additional tab.
9. When you are finished working on the service request, be sure to close all tabs that are no longer needed.

To manage to do tasks:

1. [Access CX for Utilities Agent Service](#).
2. Select the **Work Queue** page tab.
3. To search for a to do task, click the **To Dos** filter button.
4. Optionally, enter additional search text in the **Search** field and then hit **Enter**.
5. To search for to do tasks that were last updated during a specific date range:
 - Click the **Last Updated Date** button.
 - Specify the date range by manually entering dates, or by using the calendar date selectors.
 - Click inside the **Search** field to run the search.
6. Click the **Sort** icon next to one of the column headings. By default, the column is sorted in ascending order. Click the icon again to sort in descending order. Note that you can sort by only one column heading at a time.
7. When you have found the to do task you want to view or update, click the to do hyperlink. The to do opens in a new browser tab, where you can continue your work.
8. Additionally, you can [assign additional to dos to yourself](#).

Assigning a Service Request to Yourself

When you access your Work Queue, you can search for service requests that have not yet been assigned to an agent. You can use the action menu on the service request record to assign the service request to yourself.

To assign a service request to yourself:

1. [Access CX for Utilities Agent Service](#).
2. Select the **Work Queue** page tab.
3. To sort the items to show all new requests first, click the **Sort** icon next to the **Status** column heading. Be aware that you can sort by only one column heading at a time.
4. When you have found the service request you want to assign to yourself, click the action menu icon at the right of the record, and then select **Assign to me**. Note that this option is available only on service requests that have not yet been assigned.
5. The system displays a message at the bottom of the screen if the service request is successfully assigned. Be aware that the system verifies that the service request is not yet assigned to anyone. If it is no longer available for you to assign yourself to it, the system displays a message telling you that you could not be assigned to the service request. When you close the message, the Work Queue list is refreshed, and the Assign to Me option is no longer available.
6. For additional information and instructions on working with service requests, see the "Working with Service Requests" topics in the [Oracle Fusion Service library](#).

Assign a To Do to Yourself

When you access your Work Queue, you can search for outstanding to-do tasks that you can work on. You can also assign additional to do tasks to yourself from the Work Queue.

To assign a to-do task to yourself:

1. [Access CX for Utilities Agent Service](#).
2. Select the **Work Queue** page tab.
3. Click the To Dos filter button to display only to do tasks.
4. At the bottom of the screen, click the **Assign Me a To Do** button.
5. The system displays one of the following messages:
 - **To Do Assigned** is displayed at the bottom of the screen. To view the updated To Do list, refresh the screen.
 - **No To Dos Available** is displayed at the top of the screen if there are no to do tasks available to assign to you.
6. For information about to do tasks, see "To Do Processing" in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Editing Billing Accounts on a Service Request

You can add and edit the billing accounts, premises, and service points associated with a service request to ensure that the details of the request are associated with the correct entities.

To add, edit, or remove billing accounts, premises, or service points to a service request:

1. Locate the service request you want to edit on the Work Queue tab.
2. Click the **Edit Billing Accounts** link in the Action column.

Note that this option is available only if the contact on the service request is associated with at least one billing account. Therefore, if you are attempting to add billing accounts to a service request that was created in CX for Utilities Sales for a contact that is not associated with a billing account, this option might not be available. For instructions on adding billing accounts to these service requests, see [Edit Billing Accounts on a Service Request](#) in the *Using CX for Utilities Sales Guide*.

3. The system opens a new tab with the **<Service Request Title>: Billing Accounts** form in Oracle Fusion Service.
4. Continue to the next topic, "Managing Billing Accounts, Premises, and Service Points".

For additional information about viewing or editing service requests in Oracle Fusion Service, see Service Requests in the [Using Service Center in the Classic User Experience Guide](#).

Managing Billing Accounts, Premises, and Service Points

You can add or remove billing accounts, premises, or service points to entities within the Customer Experience for Utilities solution, including:

- Service requests
- Leads
- Opportunities

To add items, you must use the hierarchical order shown here:

- Billing accounts
 - Premises
 - Service points

For example, if you want to add a premise to a service request, lead, or opportunity, you must first add the associated billing account, and then you can add the premise as a child of that billing account. Similarly, if you want to add a service point, you must first add the billing account and premise, and then you can add the service point as a child of the premise.

When you remove an item, you remove the item, and all child records that are below it.

Add, Edit, or Remove Billing Accounts, Premises, or Service Points

1. Access the **<Record Title>: Billing Accounts** form. Your navigation to this form is determined by the type of record you are adding billing accounts to. This could be a service request, lead, or opportunity.
2. Click the **Add Billing Accounts** button at the top right of the screen.
3. Search for and select the billing accounts you want to attach to the record, and click **Add**.
4. The system returns you to the main form with the billing accounts in the list.
5. To add a premise as a child record under a billing account, click the Action menu (...) to the right of the billing account, and then click **Add Premise**.
6. Search for and select the premises you want to add to the record, and then click **Add**.
7. The system returns you to the main form with the premises added as children of the selected billing account. You can expand or collapse the hierarchy as necessary.
8. To add a service point as a child record under a premise, click the Action menu (...) to the right of the premise, and then click **Add Service Point**.
9. Search for and select the service points you want to add to the record, and then click **Add**.
10. The system returns you to the main form with the service points added as children of the selected premise. You can expand or collapse the hierarchy as necessary.
11. To remove a record from the hierarchy, click the Action menu (...) to the right of the record you want to remove, and then click **Remove**. Note that if you are removing an item with children, your selected record and all associated child records will be removed.
12. On the confirmation message, click **Remove**.

Using Call Features

You can set up CX for Utilities Agent Service to integrate with the Computer Telephony Integration (CTI) available in the Oracle Fusion Service system. This integration enables your customer service agents the ability to manage their phone status, answer calls, and enter wrap-up and resolution notes to a call directly from CX for Utilities Agent Service.

Optionally, your utility can turn on a reminder feature that automatically pops up when an agent ends a call. The pop up reminds the user to close all open customer records that are associated with the previous call. This feature helps your agents safeguard customer information. For details about how to enable this feature, see [Computer Telephony Integration Tasks](#) in the *Implementing Customer Experience for Utilities Guide*.

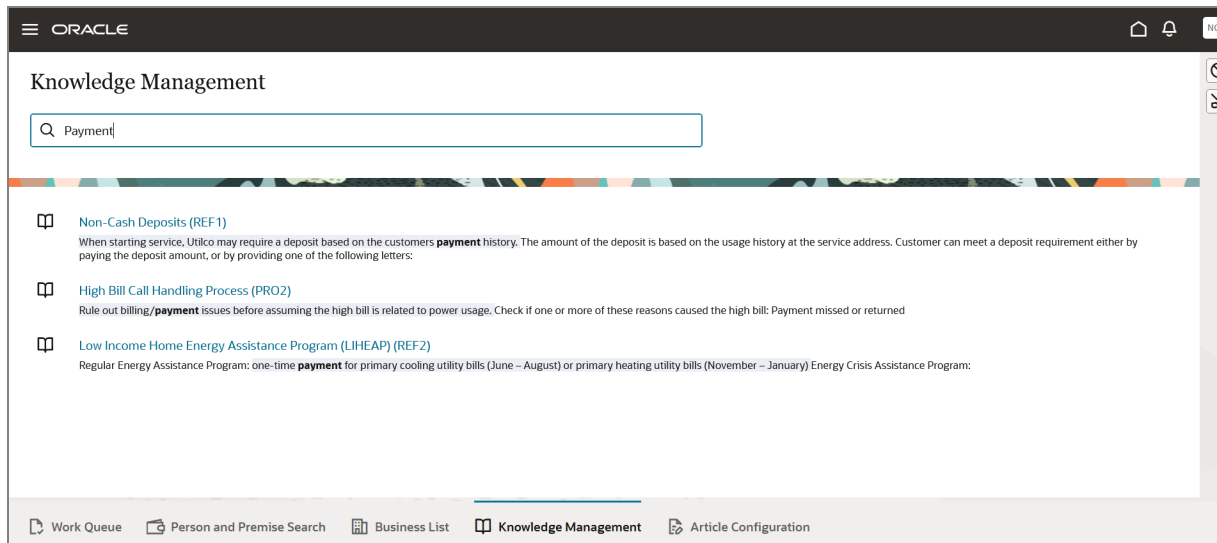
The call features are available only to users that have the customer service agent role assigned to them.

For additional information about using the CTI features, including how to set your phone status, answer a call, and wrap up a call, see the Calls chapter in the [Using Service Center in the Redwood User Experience Guide](#), available in the Oracle Fusion Service library.

Using Knowledge Management

You can use the Knowledge Management page tab to access articles that can help you solve service requests and respond to caller inquiries. When you access the Knowledge Management page tab, the system displays the My Knowledge pane. Here you can search for articles that are related to your issue, and select articles to view their contents. You can also rate articles to show which ones are valuable and which ones need to be improved.

This image shows an example of the Knowledge Management page tab:



You can also view Knowledge Management articles from within Customer 360. See [Accessing Articles from Customer 360](#) for more information.

The Knowledge Management system is part of the Oracle Fusion Service system. For additional information on how to use Knowledge Management features, see:

- The Use Knowledge Management topics in the [Oracle Fusion Service library](#).
- [Knowledge Management Implementation Tasks](#) in the *Implementing Customer Experience for Utilities Guide*.

To view Knowledge Management articles:

1. Select the Knowledge Management tab.
2. Enter search criteria in the **Ask a question** field at the top of the screen and then hit Enter.
3. Click on an article title to view the details.

4. Optionally, you can rate the article by clicking the star that represents how useful the article was. For example, if the article was very useful, click the fifth star. If the article was not useful at all, click the first star.
5. Click the back arrow at the top left to return to the main Knowledge Management tab.

Using Article Configuration

You use the Article Configuration page tab to associated specific Knowledge Management articles with pre-defined locations within Customer 360. The Article Configuration page tab is available only to users with the CSR Manager role.

Managers can use this feature to surface targeted knowledge articles on associated pages, zones, or fields within Customer 360. These articles provide customer service agents with additional information that can help them assist callers. For example, you might attach an article about state and federal payment assistance programs to the Credit and Collections zone of Customer 360.

After an article is associated with a location in the user interface, a small book icon appears in that location. When the customer service agent clicks the book, the article displays in the right pane.

To attach an article to the interface, you need two pieces of information:

- Article ID
- Location ID

This table lists the pre-defined locations within the user interface where you can attach an article:

Location ID	Location Description
KM -Customer	Use this location to attach articles to the Customer zone.

Location ID	Location Description
C1CRCO	Use this location to attach articles to the Credit & Collections - Active Process field.
C1DACU	Use this location to attach articles to the Dashboard - Customer Balance field.
C1DAPT	Use this location to attach articles to the Dashboard - Premise Actions field.
C1FIHI	Use this location to attach articles to attach articles to the Financial History - Transactions zone.
C1PAAT	Use this location to attach articles to the Payment Arrangements Process Flow - Terms field.
KM-PayPlan	Use this location to attach articles to the Payment Plan Rules zone.
C1STAP	Use this location to attach articles to the Start Service Process Flow - Auto-Pay field.
C1STDP	Use this location to attach articles to the Start Service Process Flow - Deposit field.
C1USGA	Use this location to attach articles to the Usage and Billing graph.
C1USTA	Use this location to attach articles to attach articles to the Usage and Billing table.

The Knowledge Management system is part of the Oracle Fusion Service system. For additional information on how to use Knowledge Management features, including how to search for and identify an article ID, see the Using Knowledge Management topics in the [Oracle Fusion Service library](#).

Customer 360 is part of Customer Cloud Service. The zones that are configured for display in your Oracle Utilities customer information system are the zones that appear in Customer 360 in CX for Utilities Agent Service. For additional information about

each zone or field where you can attach an article, see the Customer Information section in the *Business User Guide* associated with your Oracle Utilities customer information system. Documentation for these systems is available in the [Oracle Energy and Water Help Center](#).

Attaching an Article to the Interface

To attach an article to the interface, you need two pieces of information:

- **Article ID:** This is a four-to-six-character ID located at the top of the article.
- **Location ID:** This is the code that represents the location within the Customer 360 screen where an article can be attached. See [Using Article Configuration](#) for a list of Location IDs.

To attach an article to Customer 360:

1. [Access CX for Utilities Agent Service](#) using the CSR Manager role.
2. Select the Article Configuration page tab.
3. Identify the **Location ID** to which you want to attach an article, and click the **Edit** (pencil) button in the **Article ID** column.
4. Enter a valid article ID in the **Article ID** field, and then hit **Enter**.
5. To save your changes, click **Save** at the top right of the form.
6. To exit without saving your changes, click **Cancel**.

Removing an Article from the Interface

If an article that you attached to the interface is no longer needed, you can remove it from the interface.

To remove an article from Customer 360:

1. [Access CX for Utilities Agent Service](#) using the CSR Manager role.
2. Select the Article Configuration page tab.
3. Identify the **Location ID** from which you want to remove an article, and click the **Edit** (pencil) button in the **Article ID** column.
4. Delete the article ID and then hit **Enter**.
5. To save your changes, click **Save** at the top right of the form.
6. To exit without saving your changes, click **Cancel**.