Oracle Customer Experience for Utilities Agent Service Cloud Service

CX for Utilities Agent Service User Guide

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1 About This Guide

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:

- Accessing CX for Utilities Agent Service
- Using the Person and Premise Search
- Managing Customers and Accounts
- Managing Premises
- Using the Work Queue
- Using Call Features
- Using Knowledge Management
- Exporting Data from Agent Service

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.

Table 1-1 Related Systems

Oracle System	Related Documentation
Customer Experience (CX) for Utilities	The features described in this guide must be set up and configured during the implementation process. For information regarding the implementation of CX for Utilities solutions, see the Implementing CX for Utilities section of the Customer Experience for Utilities Help Center.
Oracle CX for Utilities Sales	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 solution, can be used together to provide a robust set of features for your utility sales and service employees. For information about CX for Utilities Sales, see the Using CX for Utilities Sales section of the Customer Experience for Utilities Help Center.
Oracle Utilities Customer Information System (CIS), which can be: • Oracle Utilities Customer Cloud Service • Oracle Utilities Customer to Meter	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: • Oracle Utilities Customer Cloud Service Help Center • Oracle Utilities Customer to Meter Help Center

Table 1-1 (Cont.) Related Systems

Oracle System	Related Documentation
Oracle Fusion Service, which includes: • Service Requests • Knowledge Management • Computer Telephony Integration (CTI)	Oracle Fusion Service is required for CX for Utilities Agent Service to function properly. See the following topics in the Oracle Fusion Service Help Center for additional information on the implementation and use of Fusion Service: • Create and edit service requests • Use my knowledge • Use knowledge authoring • Set presence and availability • Handle incoming calls
Oracle Sales, which includes: • Contacts • Accounts	Oracle Sales is required for CX for Utilities Agent Service to function properly. See the following topics in the Oracle Sales Automation Help Center for additional information on implementing and using Oracle Sales: • Managing contacts • Managing accounts

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Agent Service 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 the Customer Dashboard.
- Manage premise data from the Person and Premise Search or from the 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.

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

Table 2-1 Agent Journeys

User Journey	For More Information
The customer service agent receives a call from an existing customer. The Customer Dashboard displays the necessary information to help them resolve the caller's inquiry, including billing and usage data, interaction history, payment assistance programs, and more.	See Using the Customer Dashboard
The customer service agent receives a call from a customer who wants to start service at their rental property.	See Using the Account Header
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.	See Creating a New Contact
The customer service agent needs to search the knowledge base to answer an unfamiliar question.	See Using Knowledge Management
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.	See Using Call Features

In this chapter:

- Get to Know the UI and Features

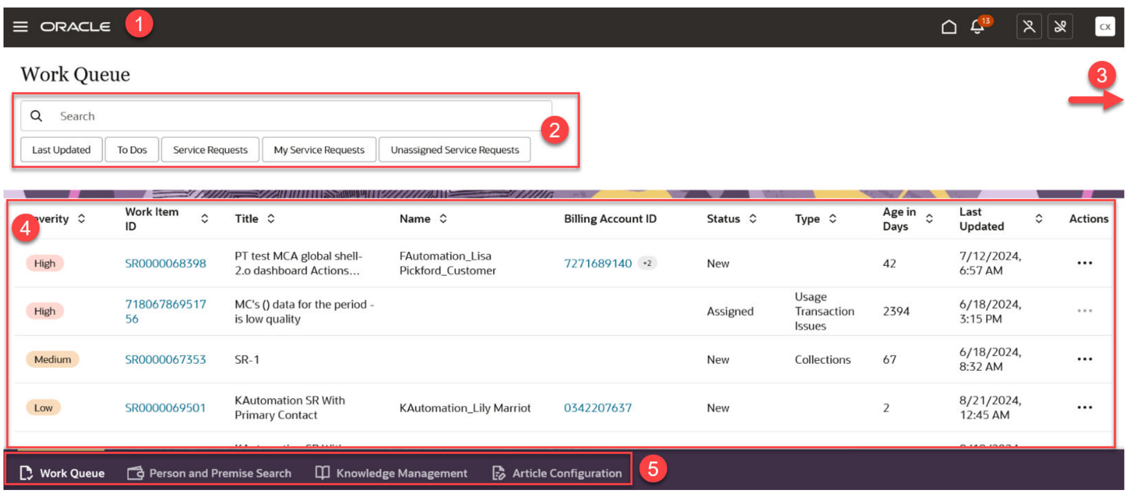
Get to Know the UI and Features

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:

- Main page areas
- Work Queue
- Person and Premise Search
- Customer Dashboard
- Premise Management
- Knowledge Management
- Computer Telephony Integration (CTI)

Main Page Areas

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



This table describes each area of the page:

Table 2-2 Agent Service Page Areas

Page Area	Description
1. Oracle Global Header	This is the standard Oracle Global Header. You use this header to: • Access other Oracle Fusion systems and applications. • Log in and out. • Access your Oracle Fusion home page. • Access and edit your profile. • Manage notifications. For additional information on using the Oracle header, see the Get Started chapter of the Using Common Features Guide, available in the Oracle Help Center.
2. Search and Filter	Most page tabs include an area at the top where you can search for and filter the records you want to review and manage.
3. Computer Telephony Integration (CTI) Access	If your solution is integrated with Oracle's CTI system, customer service agents will see icons on the top right of the page. Use these icons 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. This image shows an example of the CTI buttons that might appear on your screen: **Figure 2-1 CTI Buttons**  For additional information about integrating with a telephony system, see Using Call Features.
4. Work Area	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.

Table 2-2 (Cont.) Agent Service Page Areas

Page Area	Description
5. Page Tab Area	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: • Work Queue • Person and Premise Search • Knowledge Management • Article Configuration (Available for CSR Managers only) **Note:** 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 section of the CX for Utilities Help Center.

Work Queue

The main features of the Work Queue include:

- 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 to yourself.
- Retrieve additional to do tasks to assign to yourself.

Person and Premise Search

The main features of the Person and Premise Search include:

- 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 or to start service for a new contact.
- Use the Actions menu on existing customer, contact, or prospect records to edit the record using the quick edit method.
- Use the Actions menu on an existing contact to start service.
- Use hyperlink navigation to view and edit detailed information about contacts, customers, prospects, and premises.

Customer Dashboard

Use the Customer Dashboard to view and manage utility billing account information and transactions. The main features associated with customer management include:

- View billing account information
- Access the billing account in your CIS, where you can view and manage customer details
- View multiple billing accounts for the same contact
- Enroll customers in a payment plan
- Start service for an additional premise
- Compare the current bill to historical bills
- View a financial summary of the billing account
- View insights regarding collections and payment arrangements

- View account debt information
- View activities
- View billing history details
- View usage history details

Premise Management

You use the Premise screen to view and manage information associated with a specific premise. You access the Premise screen in one of two ways:

- **To view an inactive premise:** From the Person and Premise Search page tab, search for the premise address and click on the Premise hyperlink.
- **To view an active premise:** From the Customer Dashboard, access the Overview tab and click on a premise from the Premise section.

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.

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 Help Center, which is available in the Oracle Help Center:

- Set agent availability and preferences
- Use CTI notifications

3
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 whey they log in. Additionally, CSR Managers also have access to the Article Configuration tab.

> **Note:**
>
> 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.

Access Agent Service

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. By default, the system displays the Person and Premise Search tab for agents and displays the Work Queue tab for managers.
3. System administrators can change the default landing tab by role or by user as needed, using profile options.

4 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 new and existing 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.

For contact records you can:

- Edit contact information using the quick edit screen or by accessing the Oracle Fusion contact record.
- Start service.

For prospect records you can:

- Edit account information using the quick edit screen.
- Depending on the type of prospect, clicking the **Prospect** link will bright you to the Oracle Fusion account record, or to the Customer Dashboard.

- Start service.

For customer records you can:

- Access the Customer Dashboard to manage data and transactions.
- Edit customer information using the quick edit screen.

For premise records you can:

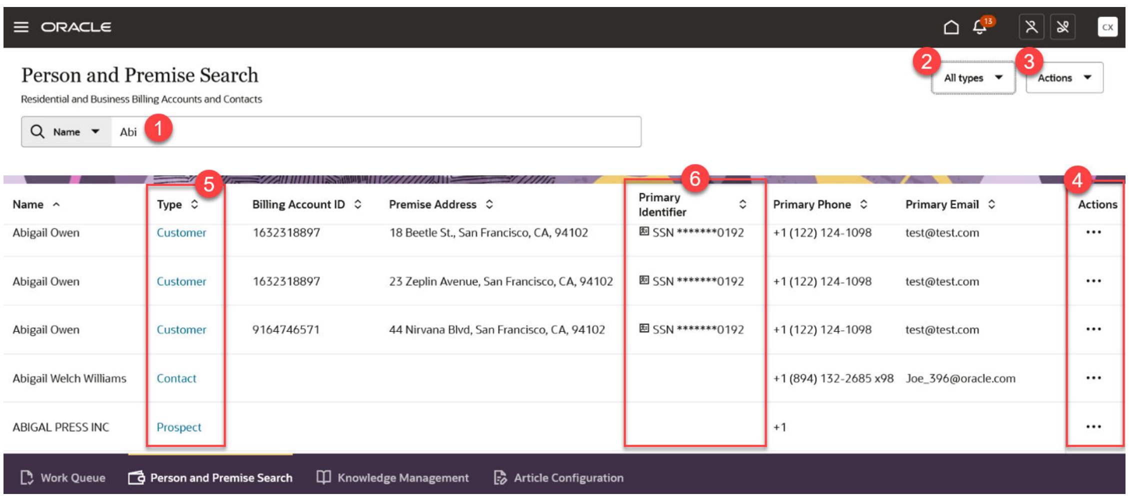
- Access premise details on the Premise page.

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

- Create a new contact.
- Start new service for someone who is not yet in your system.

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

Figure 4-1 Person and Premise Search Key Areas



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

Table 4-1 Person and Premise Search Main Areas

Page Area	Description
1. Search Area	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. Your utility can configure which fields are used as the primary identifiers, and the format that must be used when searching for records using those fields. 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) 456-7890 format. You can also sort your results using the arrows next to the column headings.
2. Display Type Filter	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.
3. Action Button	When you click the **Actions** button, you can select from these options: • **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 opens your Oracle Utilities customer information system in a new tab, where you then complete a step-by-step process to create a utility billing account. After you complete this task, you can return to the Customer Dashboard screen and these records exist: – 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

Table 4-1 (Cont.) Person and Premise Search Main Areas

Page Area	Description
4. Actions Menu	You can use the **Action** menu that appears anchored to the right side of the screen for each record in the customer list to: • **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:** Use this option to link an existing contact or prospect to an existing billing account. • **Start Service:** Use this option to start service for an existing contact or prospect. This option directs you to your Oracle Utilities customer information system to complete the start service process.

Table 4-1 (Cont.) Person and Premise Search Main Areas

Page Area	Description
5. Hyperlink Navigation	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. • **Customer:** Clicking the Customer link in the Type column navigates you to the Customer Dashboard screen for the selected row. 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 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: – **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 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 page. See Managing Premises for additional information.
6. Primary Identifier View	You can use the Primary Identifier field to view the main identifier your utility has defined, and you can hover over the card in that field to view additional identifiers. The ability to view all identifiers from the Person and Premise Search enables you to easily identify the correct record before you access customer information.

In this chapter:

- Searching for Contacts, Customers, Prospects, and Premises
- Editing Contacts, Customers, and Prospects (Quick Method)
- Editing Contacts, Customers, Prospects, and Premises (Detail Method)
- Creating a New Contact
- Starting Service for an Existing Contact or Prospect

- Start Service for a New Contact or Prospect
- Linking a Contact or Propsect to a Utility Billing Account

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.

Perform Your Search

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.
5. 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.
6. Continue to one of these topics:
   - Editing Contacts (Quick Method)
   - Edit Contacts (Detail Method)
   - Using the Customer Dashboard
   - Setting Communication Preferences
   - Managing Premises
   - Enrolling Customers in Payment Plans

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.

Use the Quick Method to Edit Contacts, Customers and Prospects

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 the Customer Dashboard page.

  > **Note:**
  >
  > The only customer information you can edit is the customer's communication preferences.

- **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.
  - **The Customer Dashboard page:** This navigation occurs for all other prospect records, enabling you to view previous account-related data.
- **Premise:** Clicking the Premise hyperlink brings you to the Premise page.

Use the Detail Method to Edit Contacts, Customers, Prospects and Premises

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 the Customer Dashboard page, where the only customer information you can edit is the customer's communication preferences.
   - **Prospect:** Clicking the Prospect hyperlink brings you to the Oracle Fusion Account page or to the Customer Dashboard page.
   - **Premise:** Clicking the Premise hyperlink brings you to the Premise page.
3. For more information, see:
   - Manage Contacts in the Oracle Sales Automation Library
   - Manage Accounts in the Oracle Sales Automation Library
   - Using the Customer Dashboard
   - Managing Premises

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.

> **Note:**
>
> 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.

Create a New Contact

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. Review the contact information to verify it is accurate.
7. 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.
8. If the information is accurate, click **Submit** at the top right of the form. The system opens the Oracle Sales Edit Contact screen.
9. Click **Save** and **Close** to complete this task.
10. For additional information about updating contact information, see Manage Contacts in the Oracle Sales Library.

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.

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 start service process opens in your Oracle Utilities customer information system.
5. 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
6. After you enter all required customer information, review and then click **Finish** to submit the information, then return to the Person and Premise Search.

Start 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.

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. The start service process flow opens for the new customer in your Oracle Utilities system. 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.
4. 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 information, review and then click **Finish** to submit the information, then return to the Person and Premise Search.

Linking a Contact or Propsect 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.

Link a Contact or Prospect to a Billing Account

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. Complete the steps as directed in your Oracle Utilities customer information system.
6. When you have entered all of the information, review it and then click Submit.

5 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.

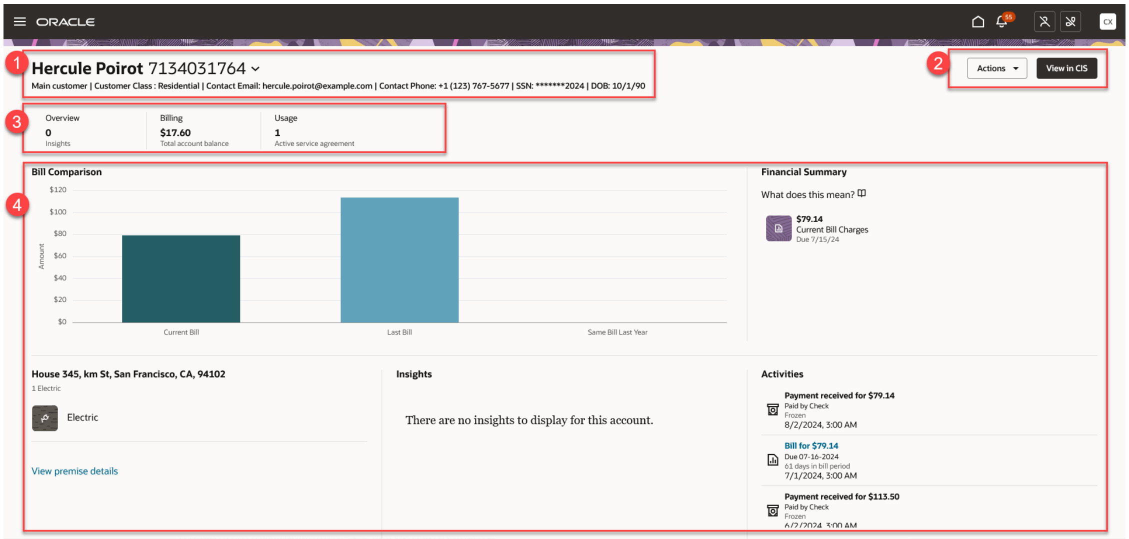
You access the Customer Dashboard by searching for a customer in the Person and Premise Search page tab, and then clicking on the Customer or Prospect hyperlink. Clicking a Customer link directs you to the Customer Dashboard. However, clicking a Prospect link will take you to the Customer Dashboard only 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:

- Use the account header to:
  - View basic information about the account
  - Access multiple billing accounts for your customer
  - Access your customer information system
  - Start service for an additional premise
  - Transfer service
  - Create service requests
  - Update communication preferences
  - View related parties
- Use the Overview tab to:
  - Compare the current bill to previous bills
  - View financial history
  - View account debt information
  - View and access premise information
  - View account insights and warnings
  - View activities
- Use the Billing tab to:
  - View financial history details
  - View billing highlights and program enrollment
  - Use the Billing History chart
- Use the Usage tab to view and manage usage information.

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

Figure 5-1 Customer Dashboard Overview



This table describes the main areas of the Customer Dashboard:

Table 5-1 Customer Dashboard Main Areas

Page Area	Description
1. Account Header	The account header provides you with 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.
2. Actions	The dashboard also includes a View in CIS button that enables you to access the customer in your Oracle Utilities customer information system, and an action menu that enables you to: • Create a service request • Access your CIS to start service for an additional premise • Access your CIS to transfer service • Update communication preferences • View related parties

Table 5-1 (Cont.) Customer Dashboard Main Areas

Page Area	Description
3. Tabs	Each tab in the Customer Dashboard provides you with different information. The tab headers include important information, and the work area of the tabs include: • **Overview tab:** Displays basic information about the account's current status, including a comparison of recent and historic bills, premise details, insights, financial summary data and interactions. 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 and details for the selected billing account. • **Usage tab:** Displays usage history and details for the selected billing account.
4. Work Area	After you select a tab, the work area of the screen displays different information, and you can perform different tasks. Tasks you can complete on the Overview tab include: • View basic information about the account • Compare the current bill to previous bills • View financial insights • View account insights and warnings • View activities • View all associated premises • Access premise details Tasks you can complete on the Billing tab include: • View financial history details for bills, bill segments, payments, and adjustments • View billing highlights and program enrollments • View the billing history chart Tasks you can complete on the Usage tab include: • Use the Usage Comparison Chart to view and compare usage data

- Using the Account Header
- Using the Overview Tab
- Using the Billing Tab
- Using the Usage Tab

Using the Account Header

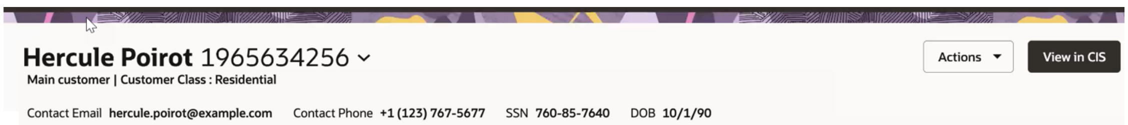
You use the account header in the Customer Dashboard to view basic information about the entity or account you are viewing and to access additional actions. The account information can include:

- 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 from a drop down list.

This image shows an example of the account header:

Figure 5-2 Customer Dashboard Header



You can also complete these actions from the header area:

- Click the **View in CIS** button to view and manage your customer directly in your Oracle Utilities customer information system. Use this button to view and manage your customer in the customer information system. For information and instructions on how to manage customers, see the Business User Guide associated with your customer information system, which is available in the Energy and Water Help Center.
- From the Actions menu, click **Create Service Request** to open a drawer that enables you to quickly create a service request for your customer.
- From the Actions menu, click **Create Payment Plan** to open a drawer that leads you through the process to identify and select a payment plan for the customer.
- From the Actions menu, click **New Start Service** to open the start service process in your Oracle Utilities customer information system. Use this process to start service for the selected customer in an additional premise. You will complete this task in your customer information system. For information and instructions on how to complete the start service process, see the "Start/Stop" topic in the Business User Guide associated with your customer information system, which is available in the Energy and Water Help Center .
- From the Actions menu, click **Transfer Service** to open the transfer service process in your Oracle Utilities customer information system. Use this process to transfer service (stop and then start) for an existing customer. You will complete this task in your customer information system. For information and instructions on how to complete the transfer service process, see the "The Transfer Service Process and Request" topic in the Business User Guide associated with your customer information system, which is available in theEnergy and Water Help Center .
- From the Actions menu, click **Update Communication Preferences** to open the Communication preferences drawer, where you can view and manage customer contacts, mailing and email addresses, and program enrollment status. See Updating Communication Preferences for additional information.
- From the Actions menu, click **View Related Party - <Name>** to view a related person. An option appears for each related party. When you select a related party from the menu, the

header of the Customer Dashboard changes to display the newly selected person and their contact information.

- Creating a Service Request from the Customer Dashboard
- Enrolling Customers in Payment Plans
- Starting Service at an Additional Premise for an Existing Customer
- Accessing Multiple Accounts from the Customer Dashboard
- Setting Communication Preferences

Creating a Service Request from the Customer Dashboard

You can use the action menu option at the top of the Customer Dashboard to select the Create Service Request option, which enables you to create a new service request for your customer.

When you create a service request, the system opens the Create Service Request drawer, 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 Smart Text Entries
- Service Request Categories
- Work Assignment and Routing

Create a Service Request

To create a service request from the Customer Dashboard:

1. Access the Customer Dashboard for your customer.
2. Click the **Action** menu at the top right, and then select **Create Service Request**.
3. The system opens the Create Service Request drawer. The Account and Billing Account fields are automatically populated based on the customer and billing account you are viewing.
4. Complete the following fields:
   - 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 Redwood Sales system, where you can create and save a contact. After you save your new contact, you must click on the Primary Contact field again 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 Sales Guide, which is available in the in the Oracle Sales Help Center.
   - 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.
5. Click **Create** at the bottom of the drawer.

6. A message appears at the top of the screen confirming the creation of the service request. See Service Requests in the Using Service Center in the Redwood Experience Guide for additional information about managing service requests.

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 option from the Action menu, you can access the Create Payment Plan drawer 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

> **Note:**
>
> The create payment plan feature is available only for utilities that use the Oracle Intelligent Adviser system. See Oracle Intelligent Advisor Implementation TasksOracle Intelligent Advisor Implementation Tasks for additional information.

In this section:

- Selecting a Payment Plan

Selecting a Payment Plan

The first step in assigning a payment plan to a customer is to select the appropriate plan.

> **Note:**
>
> The create payment plan feature is available only for utilities that use the Oracle Intelligent Adviser system.

Select a Payment Plan

To select a payment plan:

1. Access the Customer Dashboard.
2. From the Action menu at the top of the screen, select **Create Payment Plan**.
3. In the Create Payment Plan drawer, verify the account number 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 **X** at the top of the drawer 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 the options below.

- Enrolling a Customer in a Predefined Payment Plan
- Creating a Custom Payment Plan

Enrolling a Customer in a Predefined Payment Plan

If the customer selects a predefined payment plan during the selection process, use these steps to enroll the customer in the plan.

> **Note:**
>
> The create payment plan feature is available only for utilities that use the Oracle Intelligent Adviser system.

To enroll a customer in a predefined payment 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. If the customer accepts the plan, click **Save** to exit the payment plan process.
5. 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

If none of the predefined payment plans will work for your customer, and your utility allows, you can create a custom payment plan for your customer using these steps.

> **Note:**
>
> The create payment plan feature is available only for utilities that use the Oracle Intelligent Adviser system.

To create 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.
   - To add additional payments to the schedule, click the **Add Payment Schedules** button.
   - 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 **Save** to exit the payment plan process.
8. 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.
9. 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.

Starting Service at an Additional Premise for an Existing Customer

Sometimes your existing customers need to add service to additional premises. You can use the Start New Service option from the Customer Dashboard to start service at an additional premise for an existing customer.

For additional information about the start service process, see "The Start Service Process and Request" in the Business User Guide associated with your Oracle Utilities customer information system, which is available in the Energy and Water Help Center.

To start service at an additional premise:

1. Access the Customer Dashboard for your existing customer.
2. From the Action menu in the header, select **Start New Service**.
3. The system opens the start service flow in your Oracle Utilities customer information system.

4. Complete the work to start the new service and then return to the Customer Dashboard.

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.

Access Multiple Billing Accounts

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.

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 from the Customer Dashboard. With the desired billing account displayed, use the Update Communication Preferences option from the action menu, which opens the Communication preferences drawer, which contains the same information as the Set Communication Preferences screen.

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
- Managing Mailing Addresses
- Manage Notification Preferences

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.

- Adding a Contact Method
- Editing Contact Methods

Adding a Contact Method

Each utility contact must have at least one contact method associated with their billing account.

To add a contact method:

1. From the Customer Dashboard, select the billing account you want to work with in the header, and then select Update Communication Preferences from the Actions menu.
2. The system opens the Set Communication Preferences drawer.
3. In the Contact Methods section, 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. 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.

Editing Contact Methods

After you create contact methods, you can edit or delete them.

To edit or delete a contact method:

1. From the Customer Dashboard, select the billing account you want to work with in the header, and then select Update Communication Preferences from the Actions menu.
2. The system opens the Set Communication Preferences drawer.
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.

- Adding a Mailing Address
- Edit, Delete, or Deactivate an Address

Adding a Mailing Address

You can add multiple addresses to a customer or contact.

To add an address:

1. From the Customer Dashboard, select the billing account you want to work with in the header, and then select Update Communication Preferences from the Actions menu.
2. The system opens the Set Communication Preferences drawer.

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**.

Edit, Delete, or Deactivate an Address

After you add addresses to a customer or contact, you might need to edit, delete, or deactivate the address to ensure that the contact information is accurate.

To edit, delete, or deactivate an address:

1. From the Customer Dashboard, select the billing account you want to work with in the header, and then select Update Communication Preferences from the Actions menu.
2. The system opens the Set Communication Preferences drawer.
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.

Manage 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 customer information system. Documentation for these systems is available in the Energy and Water Help Center.

Enroll in a Notification

To enroll in a notification:

1. From the Customer Dashboard, select the billing account you want to work with in the header, and then select Update Communication Preferences from the Actions menu.
2. The system opens the Set Communication Preferences drawer.
3. In the Notification Preferences section of the screen, click the **Enroll and add contact** link next to the notification you want to set up.
4. In the **Send To** field, select from a list of valid contact method records.
5. 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.
6. Click the **Enroll** button to save your changes.

Using the Overview Tab

You use the Customer Dashboard Overview tab to view basic information about the account's current status. The tab header includes the number of open insights to give you an easy way to determine if the account needs attention.

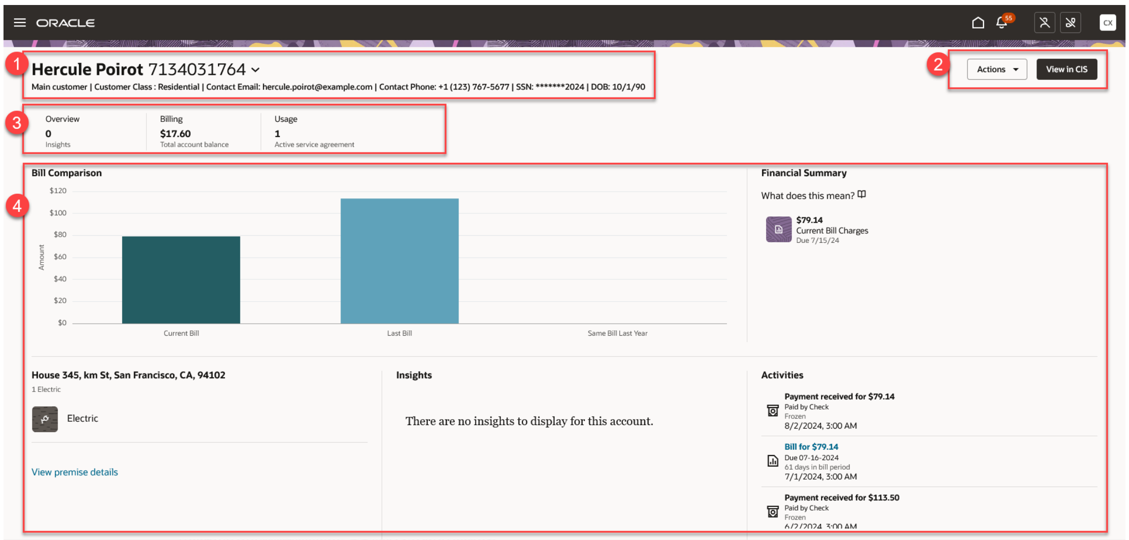
Tasks you can complete on this tab include:

- Compare the current bill to previous bills in the Billing Comparison chart
- View details about the bills displayed in the chart

- View financial summary information
- View and access premise information
- View and access account insights and warnings
- Access account debt information
- View and access activity details

This image shows an example of the Overview tab:

Figure 5-3 Overview Tab



- Using the Bill Comparison Chart
- Viewing Financial Summary Information
- Viewing Premise Information
- Viewing Account Insights
- Viewing Account Debt
- Viewing Customer Activity

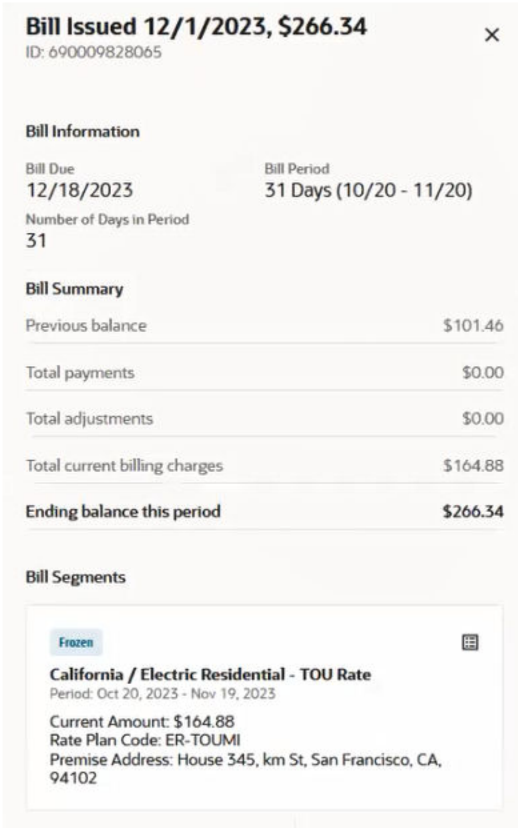
Using the Bill Comparison Chart

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:

Figure 5-4 Bill Issued Drawer



View Bill and Bill Segment Details

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:

- **What does this mean?:** The book icon next to this statement can be used to launch a Knowledge Management article that can provide agents with additional information about financial insights.
- **Total bill charges:** This insight includes the charges associated with the current bill, and indicates when the bill is due.
- Viewing the Knowledge Management Article from the Customer Dashboard

Viewing the Knowledge Management Article from the Customer Dashboard

When you click the book icon next to the **What does this mean?** statement in the Financial Summary section of the Overview tab, the system opens the Article Reference drawer where you agents can view additional information about the financial insights that are displayed.

The article that appears in the drawer is determined during the implementation process. If no article is set up, the drawer is empty.

Access the Pre-defined Article Using the Book Icon

To access the pre-defined article using the book icon:

1. Access the Customer Dashboard by selecting a customer from the Person and Premise Search.
2. Locate and click on the **Book** icon.
3. The Article reference drawer opens on the right side of the screen.
4. Review the information in the article.
5. 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.
6. Click the **X** at the top right to close the drawer.

Search the Knowledge Management System for Additional Articles

To search the Knowledge Management system for additional articles:

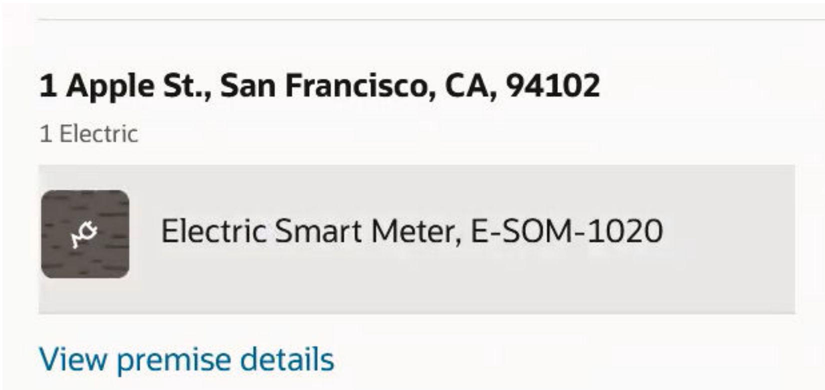
1. Access the Customer Dashboard by selecting a customer from the Person and Premise Search.
2. Locate and click on the **Book** icon. The Article reference drawer opens on the right side of the screen.
3. In the search bar at the top of the drawer, enter your search criteria and hit **Enter**.
4. Select 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. Click the **X** at the top right to close the drawer.

Viewing Premise Information

When you access the Customer Dashboard, you can view information about the premises and service points that are associated with the billing account. The Premises panel displays premise and service point information in different formats, and provides access to additional information using different links, depending on the number of premises and service points that are associated with the billing account.

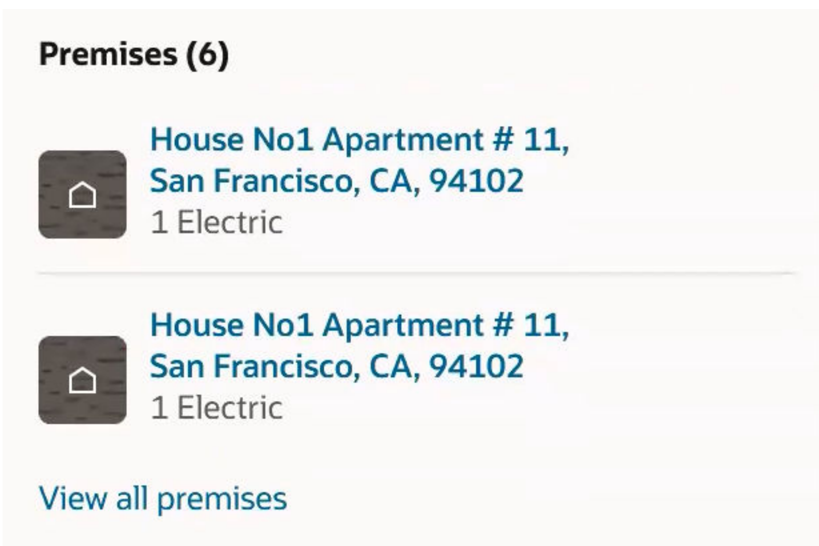
For example, if a billing account has only one premise, the premise address is used as the header for the Premise panel, the service points and meter details (if available) are listed below the address, and the View premise details link provides access the Premise screen, where you can view and manage premise information. This image shows an example of the Premise panel with a single premise:

Figure 5-5 Single-Premise Example



If there are multiple premises associated with the billing account, the panel heading is Premises and includes the number of premises associated with the billing account. Below the heading, each premise is listed, and the View all premises link enables you to open the Premises drawer to view a complete list of premises associated with the billing account. You can click on the address in the panel, or from the Premises drawer to access the Premise screen, where you can view and manage premise information. This image shows an example of the Premise panel with multiple premises:

Figure 5-6 Multiple-Premise Example

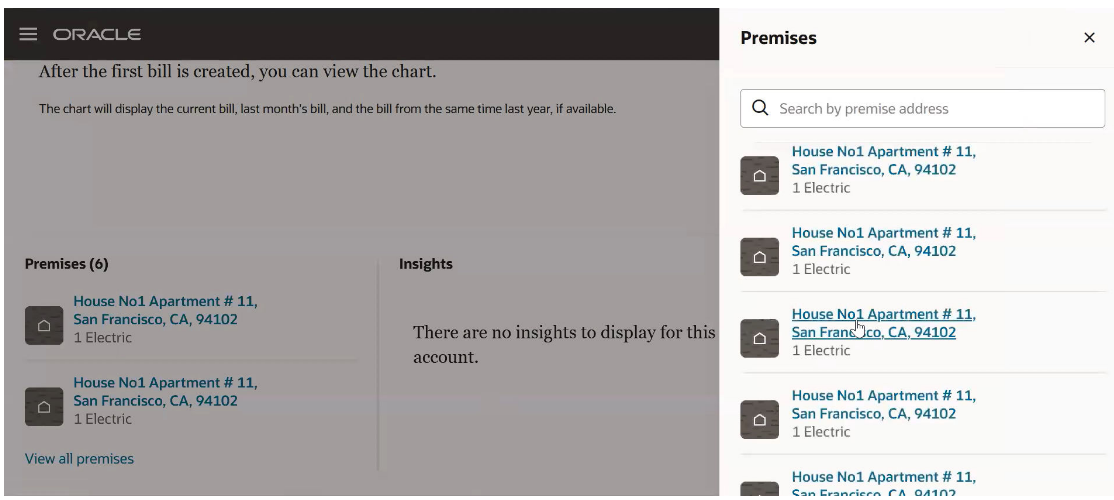


The system will also display warning messages on premises that have disconnected service points, as shown here:

Figure 5-7   Premise With Warning

When you click the View All Premises link, the Premises drawer opens on the right of the screen, and includes a longer list of premises. This image shows an example of the Overview tab with the Premises drawer displayed:

Figure 5-8   Premise Drawer



Viewing Premise Information

To view premise information from the Customer Dashboard:

1. Access the Customer Dashboard and select the Overview tab.
2. From the Premises panel, complete one of these steps:
   - Click on the premise address.
   - Click the **View premise details** link.
   - Click the **View all premises** link, and then click on a premise address in the Premises drawer.
3. The system displays the Premise screen. See Managing Premises for additional information about how to use the Premise screen.

Viewing Account Insights

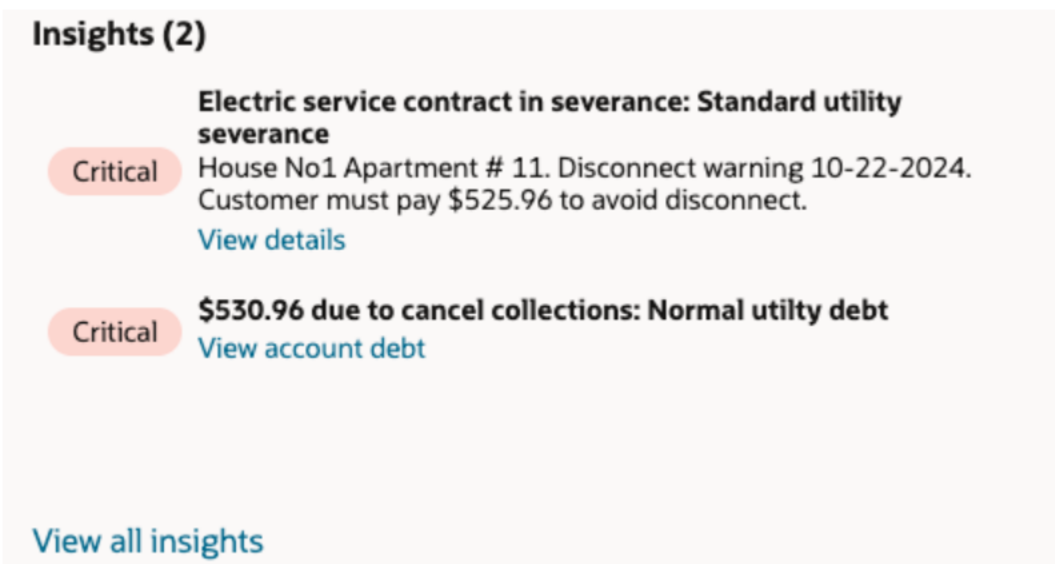
The Insights section of the Overview tab provides you with lists of insights associated with the billing account you are viewing. The heading of the section includes the number of insights currently associated with the account. Insight types include:

- **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 account debt link, which opens the Debt Summary drawer. From there you can click the View details link on an insight to open 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:

Figure 5-9 Account Insights



View Account Insights

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.

3. Click the **X** at the top right of the drawer to close it.
4. Whether in the Overview tab or in the Insight drawer, complete one of these steps:
   - 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 in the Energy and Water Help Center.
   - Click the **View account debt** link on a collections insight to view details in the Debt Summary drawer.
5. When you are finished, close the tab or the drawer to return to the Customer Dashboard.

Viewing Account Debt

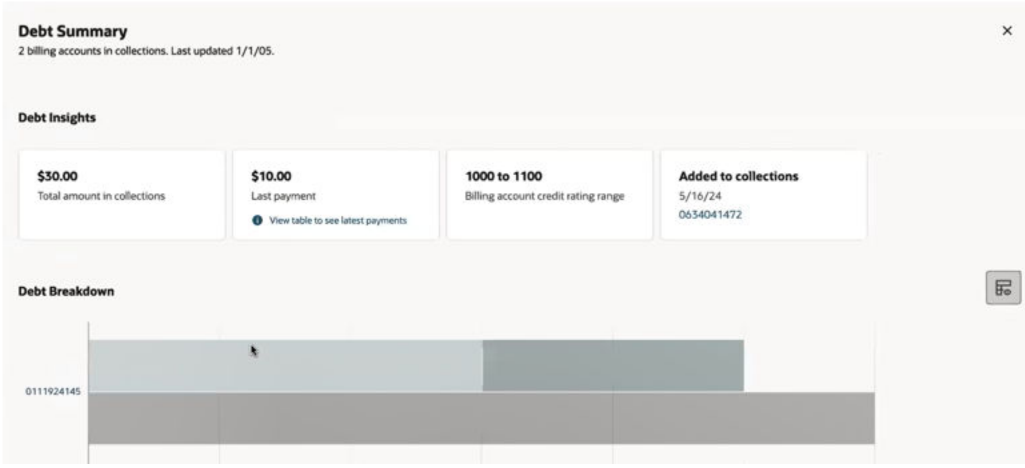
When utility accounts enter into the collections or severance process in your customer information system, insights are displayed on the Overview tab of the Customer Dashboard. You can use links from those insights to view detailed information about the debt that is associated with the account.

When you click the View account debt link on a collections insight, the system displays the Debt Summary drawer, which includes:

- **Header details:** At the top of the screen, the system displays the date that the collection information was last received from the customer information system. For information about how debt information is handled in your customer information system, see "How Arrears History is Captured" in the Business User Guide associated with your Oracle Utilities customer information system, which is available in the Energy and Water Help Center.
- **Scorecards:** At the top of the screen, the system displays scorecards that provide an at-a-glance view of important debt details. Scorecards include:
  - Total amount in collections
  - Last payment
  - Billing account credit rating
  - Date the account was added to the collections process
- **Debt Breakdown:** This section of the screen provides you with a chart or a table view that details the debt information. You can toggle between the chart and table views using the icon at the top right of this section, and you can view the following information by billing account:
  - Amount in collections
  - Minimum amount due
  - Amount of any scheduled payments

This image shows an example of the Debt Summary drawer:

Figure 5-10 Debt Summary Drawer



- Using Debt Scorecards
- Using the Debt Breakdown

Using Debt Scorecards

When you access the Debt Summary drawer, there are several scorecards that appear at the top of the screen. These scorecards provide you with an at-a-glance view of important debt details. These are the scorecards that are displayed in the Debt Summary drawer:

- **Total amount in collections:** This scorecard displays the total amount that is currently in the collections process for the selected billing account.
- **Last payment:** This scorecard displays the amount of the last payment received towards the amount in collections. You can click on this scorecard to display the table view of the account debt in the Debt Breakdown section of the screen.
- **Billing account credit rating:** This scorecard displays the credit rating of the selected billing account.

Using the Debt Breakdown

The Debt Breakdown section of the Debt Summary drawer provides you with a chart or a table view that details the debt information. You can toggle between the chart and table views using the icon at the top right of this section. When you first enter the Debt Summary drawer, the system displays the chart, which includes summarized debt information for the selected billing account.

Debt Breakdown Chart View

The chart view is displayed by default when you access the Debt Summary drawer, and it includes the following information:

- The amount in collections
- The minimum amount due, which is displayed as a portion of the total amount in collections.
- Scheduled payments

You can hover over any section of the chart to view additional detail.

Debt Breakdown Table Overview

To display the table view of the Debt Breakdown, do one of the following:

- Click the Last Payment scorecard at the top of the screen.
- Click the toggle icon at the top right of the chart to change the view.

The table view provides more detailed debt information, including:

- **Multiple scheduled payments:** If there are multiple scheduled payments for a billing account, the table view includes a View list link in the Scheduled Payment Date column. You can click this link to view the date and amount associated with each scheduled payment.
- **Disconnection information:** The Disconnection column provides details about when the billing account was or will be included in the disconnection process. You can hover over the details in the Disconnection column to view additional details.

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 are grouped by categories, which include:

- **Conversation Message:** These 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 to the chat, the customer that started the chat, the date and time of the chat, and if available, the chat resolution, chat summary 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.
- **Service Task:** 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.
- **Financial Information:** This category includes:
  - **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 Information:** This category includes:
  - **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.
  - **Case:** Case records show all instances of when a case was opened for the account in your Oracle Utilities CIS.
  - **Rebate Claim:** Rebate claim records identify all instances of a customer applying for a rebate.
- **Service Order:** 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 Order:** Field order records identify activities 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.
- **Credit and Collection:** This category contains the following record types:
  - Collection Process
  - Severance Process
  - Write Off Process
  - Pay Plan Overdue Process
  - Payment Arrangement
  - Cut Process
  - Credit Rating History
  - Cash Only History
- **Outage Call:** These records identify instances when the customer called in regarding an outage.

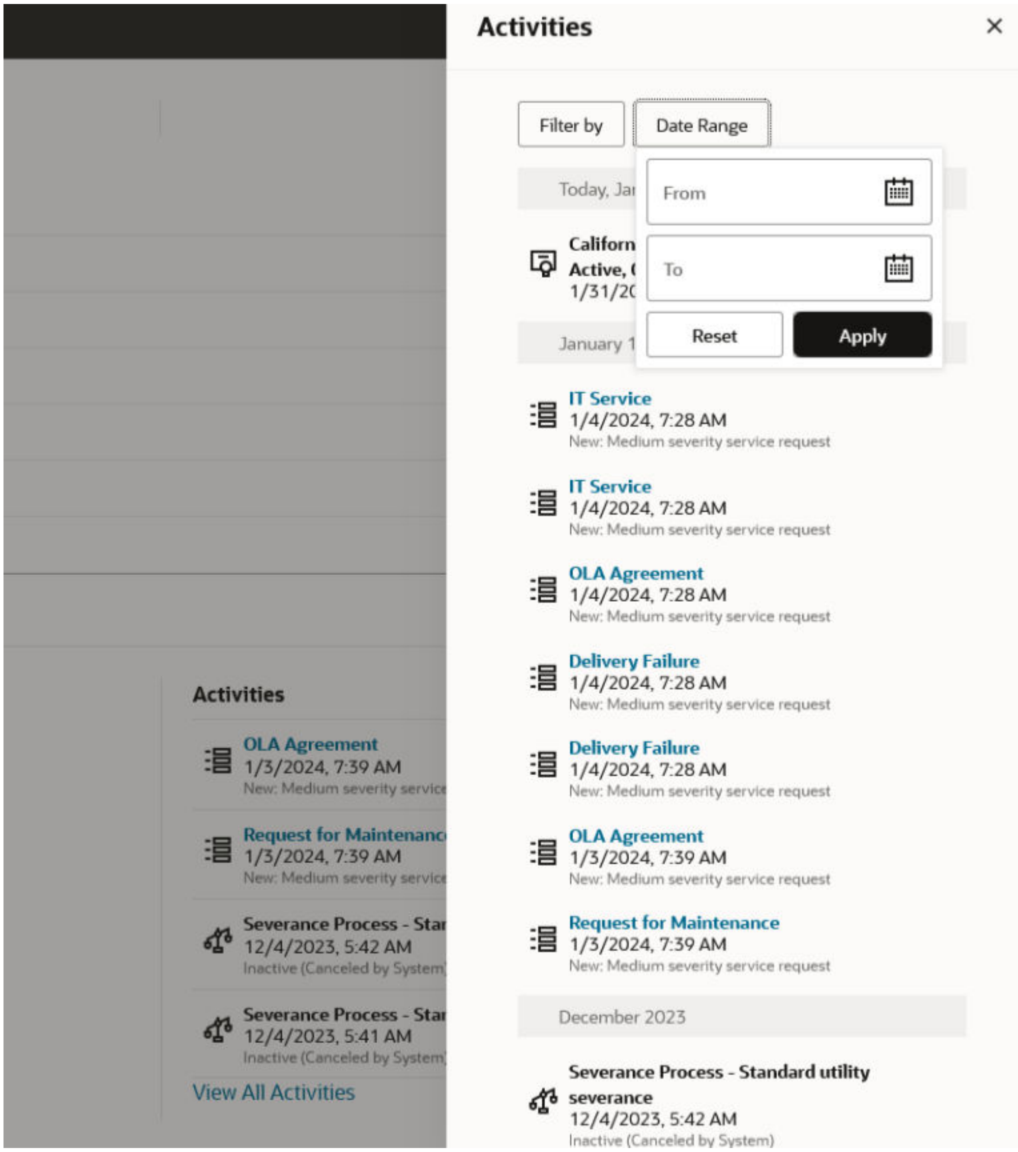
When you click the View All Activities link, the Activities drawer opens on the right of the screen, and includes a longer list of activities.

You can use the Filter By button to refine your activity list to specific categories. For example, you might want to search for Conversation Message to view agent notes that were recorded for a call, or to see what was said in a chat.

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:

Figure 5-11 Activities Drawer



View Activities

To view activities from the Customer Dashboard:

1. Access the Customer Dashboard and select the Overview tab. 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.
2. To filter records by activity type, click the **Filter By** button, click on the activity type categories that you want to view, and then click **Apply**.
3. 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**.
4. The system displays all activity records that match your filter criteria.
5. 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**.
8. The search results then include all records for the time frame configured by your utility.

Using the Billing Tab

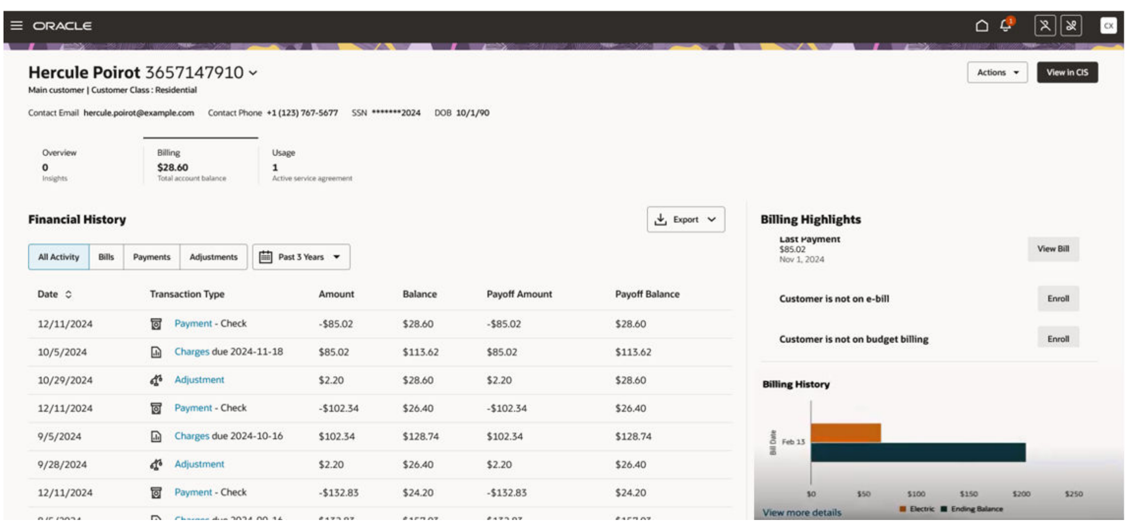
To answer customer inquiries or determine how to best serve a customer, you might need to view information about their utility bills. Once you have accessed a billing account in the Customer Dashboard, you can use the Billing tab to view and analyze billing history, data, and trends. The scorecard in the header includes the total account balance to give you a quick view of how much the customer currently owes.

Billing account information is displayed in the following sections:

- **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.
- **Billing Highlights:** This section of the Billing tab provides important billing data points, such as the date of the next bill, details about the last payment, and information on e-bill and budget billing program enrollment.
- **Billing History:** This section of the Billing tab displays a chart that represents the billing history for the last six months 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 click on a bar in the chart to view bill details, or click on the **View more details** link to view additional billing history.

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

Figure 5-12 Billing Tab



- [Viewing Financial History Details](#)

- Using Billing Highlights
- Using Billing History Charts

Viewing Financial History Details

By default, all financial history records are displayed in the Financial History list on 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.

View Financial History Details

To view financial history details:

1. On the Customer Dashboard, select the Billing tab. Search for and locate a financial history record in the Financial History section.
2. 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 the next topics to understand the detailed information in the drawers.

- Viewing Payment Details
- Viewing Adjustment Details
- Viewing Bill and Bill Segment Details

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 serve 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.
- Click the View button on the Last Bill option in the Billing Highlights section.

After you select a bill, you can see detailed information about the bill as a whole, open a PDF of the bill (if it is available in your CIS), or 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.
   - Click the **View** button on the Last Bill option in the Billing Highlights 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
   - A PDF icon that you can click on to view the bill. This option is only available if the PDF URL is available in your CIS.
   - 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 Billing Highlights

The Billing Highlights section of the Billing tab provides key data points about the customer's current billing situation, including:

- **Next Bill Scheduled:** This is the date of the next scheduled bill.
- **Last Payment:** This highlight includes the amount and date of the last payment, and provides a View Bill button that opens the Bill drawer.
- **E-Bill (Paperless Billing) Enrollment:** This item identifies whether the customer is enrolled in an paperless billing program, and provides a button to either enroll the customer in the program if they are not currently enrolled, or to view current enrollment information. Both buttons open the Paperless billing drawer, where you can manage your customer's enrollment.
- **Budget Billing Enrollment:** This item identifies whether the customer is enrolled in a budget billing program, and provides a button to either enroll the customer in the program if

they are not currently enrolled, or to update current enrollment information. Both buttons open the Budget billing drawer, where you can manage your customer's enrollment.

> **Note:**
>
> You can use the buttons in the Billing Highlights section of the Billing Tab to manage customer enrollment in the following billing programs:
>
> - Electronic Billing
> - Budget Billing

The text that appears in the program enrollment highlights is determined by the setup in your CIS. For example, if your electronic bill program is simply called "e-bill" in your CIS, the highlight reads as follows, depending on whether the customer is enrolled:

- Customer is on e-bill
- Customer is not on e-bill

If customers are not already enrolled in the program, you can click the Enroll button to complete the program enrollment process in your CIS. If the customer is already enrolled in the program, you can click the View button to view and manage the enrollment in the CIS.

For more information about program enrollment, see "Customer 360 - Program Enrollment" in the Business User Guide for your Oracle Utilities CIS, which is available in the Oracle Energy and Water Help Center.

- Managing Paperless Billing Programs
- Managing Budget Billing Programs

Managing Paperless Billing Programs

You can enroll and unenroll customers from paperless billing, also known as E-Bill, using the Billing Highlights section of the Billing tab.

> **Note:**
>
> The names of billing programs can vary by utility.

Enrolling a Customer in Paperless Billing

To enroll a customer in a paperless billing program:

1. Access the Customer Dashboard for the billing account you want to review and select the Billing tab.
2. In the Billing Highlights section of the form, scroll down to the **Customer is not on e-bill** option.
3. Click the **Enroll** button next to the option.

> **Note:**
>
> If the customer is already enrolled, the **Enroll** button is replaced by the **View** button.

4. The system opens the Paperless billing drawer.
5. Review the email address for the enrollment, and then click **Enroll**. Alternatively, you can click the **Communication preferences** link, and follow the instructions in Setting Communications Preferences to update the email address.
6. The system displays a success message when the enrollment is processed.

Unenrolling a Customer from Paperless Billing

To unenroll a customer from a billing program:

1. Access the Customer Dashboard for the billing account you want to review and select the Billing tab.
2. In the Billing Highlights section of the form, scroll down to the **Customer is on e-bill** option and click the **View** button.

> **Note:**
>
> If the customer is not enrolled, the **View** button is replaced by the **Enroll** button.

3. The system opens the Paperless billing drawer.
4. Click **Unenroll**.
5. The system displays a success message when the unenrollment is processed.

Managing Budget Billing Programs

You can enroll and unenroll customers from budget billing using the Billing Highlights section of the Billing tab.

> **Note:**
>
> The names of billing programs can vary by utility.

Enrolling a Customer in Budget Billing

To enroll a customer in a budget billing program:

1. Access the Customer Dashboard for the billing account you want to review and select the Billing tab.
2. In the Billing Highlights section of the form, scroll down to the **Customer is not on budget billing** option.
3. Click the **Enroll** button next to the option.

> **Note:**
>
> If the customer is already enrolled, the **Enroll** button is replaced by the **Update** button.

4. The system opens the Budget billing drawer.
5. Select a date in the **When will budget billing start?** field. You can not select a past date in this field.
6. Review the recommended budget amounts for each service contract, updating each amount as needed.
7. Click **Enroll**.
8. The system displays a success message when the enrollment is processed.
9. Review the data in the Billing Highlights section to see the date the enrollment was last changed, the amount of the next bill, and the date on which the system will perform a true-up to determine the ongoing bill amount.
10. You can change the amounts at any time by clicking the **Update** button, entering new amounts, and clicking **Update**.

Unenrolling a Customer from Budget Billing

To unenroll a customer from a budget billing program:

1. Access the Customer Dashboard for the billing account you want to review and select the Billing tab.
2. In the Billing Highlights section of the form, scroll down to the **Customer is on budget billing** option and click the **Update** button.

> **Note:**
>
> If the customer is not enrolled, the **Update** button is replaced by the **Enroll** button.

3. The system opens the Budget billing drawer.
4. Click **Unenroll**.
5. The system displays a confirmation message. Click **Unenroll** to continue.
6. The system displays a success message when the unenrollment is processed.

Using Billing History Charts

The billing history charts in the Billing tab provide you with multiple views of the customer's billing history. The small chart at the bottom right of the Billing tab provides you with an at-a-glance view of the last six months of billing history. When you click on the View more details link below this chart, the Billing History drawer opens, displaying a larger chart. In this view, you can navigate through the available data using the date arrows above the chart, and you can export the data you see in the chart.

In either view, you can click on a bar to view details about the selected bill.

> **Note:**
>
> The date range available for viewing is configurable and determined by your utility. By default, you can view 3 years of historical data.

Using the Chart in the Billing History Section of the Billing Tab

To use this chart:

1. From the Customer Dashboard, select the Billing tab.
2. In the Billing History section of the Billing tab, scroll down to view up to six months of billing history.
3. Hover over a bar to view dates, service types, and billing amount details.
4. Click on a bar to view billing details. The system opens the Bill drawer. For additional information about viewing billing details, see View Bill and Bill Segment Details.
5. Click the **X** at the top of the drawer to close it and return to the Billing tab.

Using the Chart in the Billing History Drawer

To use this chart

1. From the Customer Dashboard, select the Billing tab.
2. In the Billing History section of the Billing tab, click the **View more details** link below the chart.
3. In the Billing History drawer, 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.
4. Hover over a bar to view dates, service types, and billing amount details.
5. Click on a bar to view billing details. The system opens the Bill drawer. For additional information about viewing billing details, see View Bill and Bill Segment Details.
6. Click the **X** at the top of the drawer to close it and return to the Billing tab.
7. To return to the Billing History drawer, click the **View more details** link again.
8. To export chart data, click the **Export** button at the top of the chart.
9. Click the **X** at the top of the drawer to close it and return to the Billing tab.

Using the Usage Tab

You use the Usage tab to view historical usage information for a selected billing account. The tab header shows the number of active service agreements associated with the account. The work area includes these main sections:

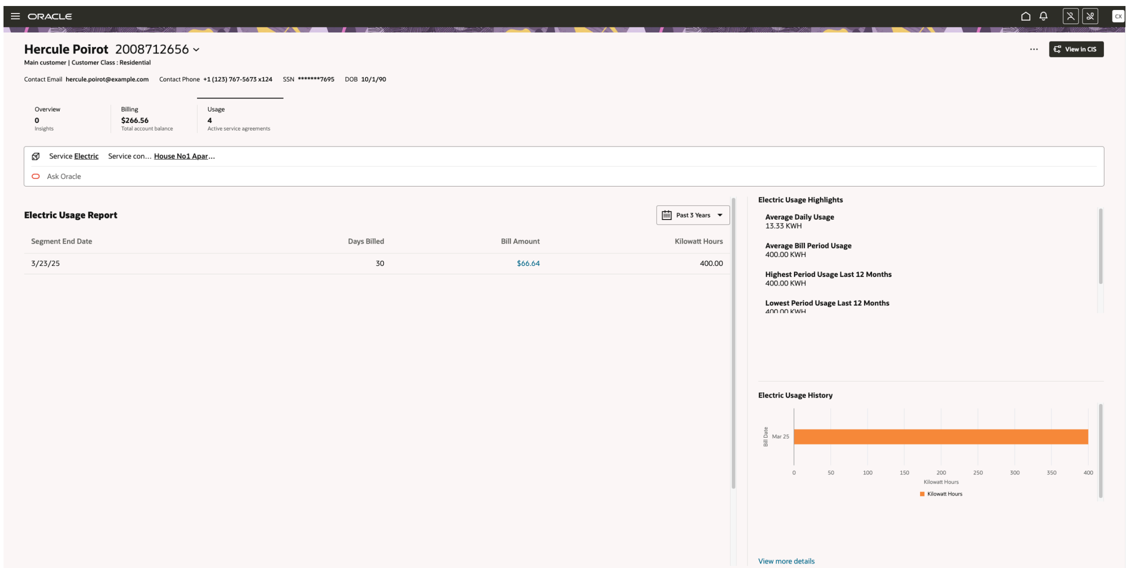
- **Filter Bar:** Use this area of the Usage tab to select the service type and service contract you want to view usage data for.
- **<Service Type> Usage Report:** Use this section of the Usage tab to view a list of usage details for the specified service type and service contract. By default you can view the past three years of data, but you can change your date range as needed.
- **<Service Type> Usage Highlights:** Use this section of the Usage tab to get an at-a-glance view of the main highlights related to the selected service contract, including:

- Average Daily Usage
- Average Bill Usage
- Highest Bill in the Last 12 Months
- Lowest Bill in the Last 12 Months
- Usage for the Last 12 Months

- **<Service Type> Usage History:** Use this section of the Usage tab to view a chart of the usage data for the selected service type. By default, this chart shows the last 6 months of data. Click the **View more details** link to open the Usage History drawer and view additional details.

This image shows an example of the Usage tab:

Figure 5-13 Usage Tab



- Selecting a Service Contract
- Viewing Usage History Details
- Using Usage Highlights
- Using the Usage History Chart

Selecting a Service Contract

Data on the Usage tab is specific to a single service point for the selected account. You use the search bar at the top of the tab to specify the service type and related service contract you want to view.

> **Note:**
>
> The **Ask Oracle** field in the Search bar is available in all Search bars. However, in this scenario, no additional search criteria can be used when selecting a service contract. Therefore, if you attempt to search using this field, the system returns a **No matches found** message.

Select a Service Contract

To select a service contract:

1. From the Customer Dashboard, select the Usage tab.
2. By default, the system displays the first service contract associated with the billing account.
3. To change the display, click on the service type filter, and then select an option from the drop down menu.
4. Then click on the Service Contract filter and select an option. The system displays all available service contracts that are associated with the selected billing account and service type.
5. The data on the screen changes to reflect your selection.

Viewing Usage History Details

To answer customer inquiries, or determine how to best serve a customer, you might need to view detailed information about usage data on a specific bill segment. You can access usage history details from the Usage tab. After you select a service type and service contract, the related bill segments are displayed in the Usage History Report section. You can click on the hyperlink in the Bill Amount column of any record to view the details associated with the bill segment.

View Usage History Details

To view usage history details:

1. Access the Customer Dashboard for the billing account you want to review and select the Usage tab.
2. Select the service type and service contract you want to view. See Selecting a Service Contract for instructions.
3. Click on a bill segment record in the Usage History section.
4. The system displays the Bill drawer on the right side of the screen.
5. 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.
6. To close the Bill drawer, click the **X** at the top.

Using Usage Highlights

The Usage Highlights section of the Usage tab provides key data points about the customer's usage over the past 12 months, including:

- Average Daily Usage
- Average Bill Usage

- Highest Bill in the Last 12 Months
- Lowest Bill in the Last 12 Months
- Usage for the Last 12 Months

Below each highlight heading, the usage and unit of measure appear. In cases where multiple units of measure are available for a highlight, both values are displayed.

Using the Usage History Chart

The usage history charts in the Usage tab provide you with multiple views of the customer's usage history. The small chart at the bottom right of the tab provides you with an at-a-glance view of the last six months of usage history. When you click on the **View more details** link below this chart, the Usage History drawer opens, displaying a larger chart. In this view, you can navigate through the available data using the date arrows above the chart, change the unit of measure or level of detail (if available), and you can export the data you see in the chart.

> **Note:**
>
> The date range available for viewing is configurable and determined by your utility. By default, you can view 3 years of historical data.

When in the Usage History drawer, you can change your view by:

- 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 to view more granular detail, if it is available.

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 chart that includes a bar for each day in that bill period.

> **Note:**
>
> You can only access more granular detail in the 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.

Using the Usage History Charts

To use usage charts:

1. From the Customer Dashboard, select the Usage tab.
2. Select the service contract you want to view.
3. The system displays the last six months of usage data in the Usage History chart at the bottom right of the work area.

4. Complete one of these actions:
   - Scroll to view the last 6 months of data.
   - Click the **View more details** link to open the Usage History drawer.
5. In the Usage History drawer, you can change your view by:
   - 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 to view more granular detail (if available).
6. Click the X at the top of the drawer to close it and return to the Usage tab.

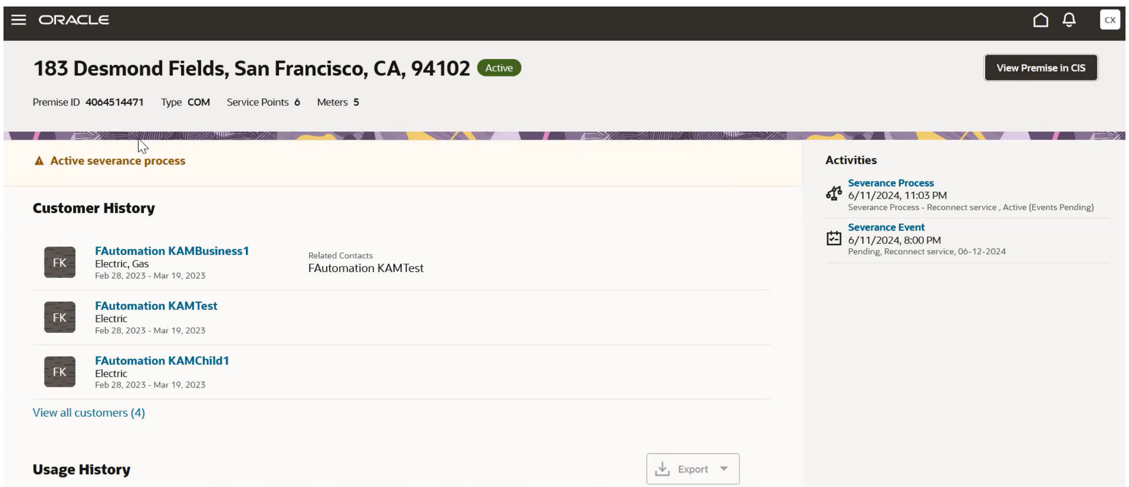
6 Managing Premises

You use the Premise screen to view and manage information associated with a specific premise. You access the Premise screen in one of two ways:

- **To view an inactive premise:** From the Person and Premise Search page tab, search for the premise address and click on the Premise hyperlink.
- **To view an active premise:** From the Customer Dashboard, access the Overview tab and click on a premise from the Premise section.

This image shows an example of the Premise screen:

Figure 6-1 Premise Screen



This table describes the main areas of the Premise screen:

Table 6-1 Premise Screen Main Areas

Page Area	Description
1. Premise Header	The header provides you with basic information about the premise, which can include: • Premise address • Premise status - The status will show active if there are any active service agreements at the premise. • Premise ID • Premise type - The number of service points and meters at the premise The header also includes a View Premise in CIS button that enables you to access the premise in your Oracle Utilities customer information system.

Table 6-1 (Cont.) Premise Screen Main Areas

Page Area	Description
2. Customer History	The Customer History section provides you with customer details associated with the customers that currently have and previously had service at the selected premise. By default, this section displays details about the three most recent customers, and enables you to open the Customer History drawer to view and access all previous customers.
3. Usage History	The Usage History section provides a tab for each service type that has had usage at the premise. Each tab provides the average cost per month and usage charts for each service type. Each tab contains options that enable you to specify the data that you want to render in a usage chart. For example, you can choose to display electric data by month for a specific meter. You can then use arrows to scroll through all available data.
4. Service Points	The Service Points section displays a card for each service point that is available at the premise. The cards provide details such as whether the service point is in service, the dates of service, and when the service was installed. You can also click on the View in CIS button to view details about the service point in your Oracle Utilities customer information system.
5. Activities	The activities section provides you with a list of activities associated with the selected premise. You can click on each activity to view additional details.

- Accessing Premise Information
- Viewing Customer History for a Premise
- Viewing Usage History for a Premise
- Viewing Service Points for a Premise
- Viewing Activities for a Premise

Accessing Premise Information

Depending on whether you want to view information about an active or inactive premise, you will navigate to the Premise screen in different ways.

- **Active premises:** To view an active premise, you must first access the customer information associated with the active premise. From the Customer Dashboard, you can then select the premise you want to view on the Overview tab to launch the Premise screen.
- **Inactive premises:** To view an inactive premise, you can search for the premise address on the Person and Premises Search screen. When you have located the premise you want to view, click on the Premise hyperlink to launch the Premise screen.

Access an Active Premise

To access an active premise:

1. From the Person and Premise Search screen, search for the premise address or the name of the customer associated with the premise.
2. Click on the **Customer** hyperlink associated with the premise.
3. On the Customer Dashboard, select the Overview tab.
4. In the Premise section of the Overview tab, click on the premise you want to view.
5. The system displays the Premise page.

Access an Inactive Premise

To access an inactive premise:

1. From the Person and Premise Search screen, search for the premise address.
2. Click on the **Premise** hyperlink associated with the premise.
3. The system displays the Premise page.

Viewing Customer History for a Premise

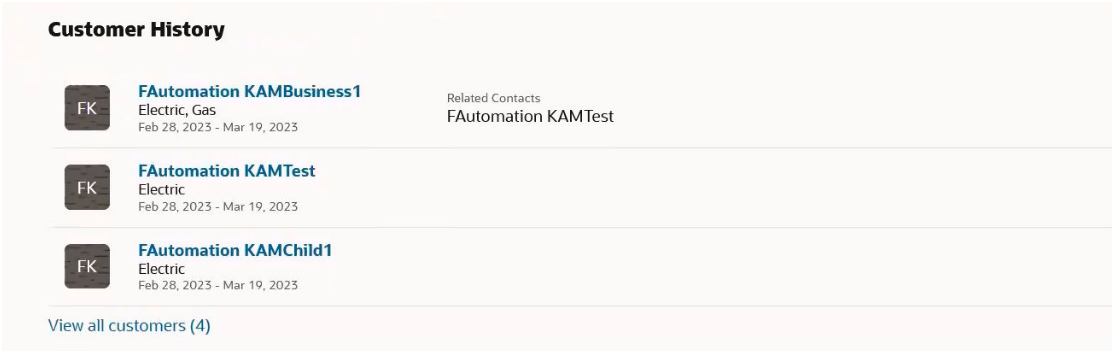
Below the header of the Premise page, you can view information about the customers who currently or previously had service at the premise. The Customer History section of the screen includes:

- A list of the three most recent customers to have service at the premise. If a customer currently has service, the Active badge displays next to the customer name. Each record in the list includes:
  - The customer name
  - The service types that were active
  - The dates when the customer had active service
  - A list of the related contacts (if available)
- A link to view a list of all customers who have had service at the premise is displayed if there are more than three customers with history. When you click on this link, the system displays the Customer History drawer.

To access detail about any of the customers, you can click on the customer's name on the Premise screen or in the Customer History drawer to open the Customer Dashboard.

This image shows an example of the Customer History section of the Premise screen:

Figure 6-2 Customer History



Access Customer History From the Premise Screen

To access customer history information from the Premise screen:

1. Access the Premise screen.
2. From the Customer History section, complete one of these actions:
   - Click on the name of a customer from the initial list.
   - Click the View all customers link to open the Customer History drawer, and then click on the name of a customer.
3. The system displays the Customer Dashboard for the selected customer.

Viewing Usage History for a Premise

The Usage History section appears below the Customer History section of the Premise page, and provides a tab for each service type that has had usage at the premise. Each tab provides:

- The average cost per month of the selected service type
- A usage chart for the selected service type
- Options that enable you to specify the data that you want to render in the usage chart. The options enable you to:
  – Select the service point and meter you want to review.
  – Select the unit of measure you want to view. The values that are available are based on the selected service type and usage history.
  – Select the level of detail you want to view in the chart. The values that are available depend on the available data. For example, if no daily data is available, you cannot select the daily view for your chart.
  – Use the arrows to scroll through the available data by date.

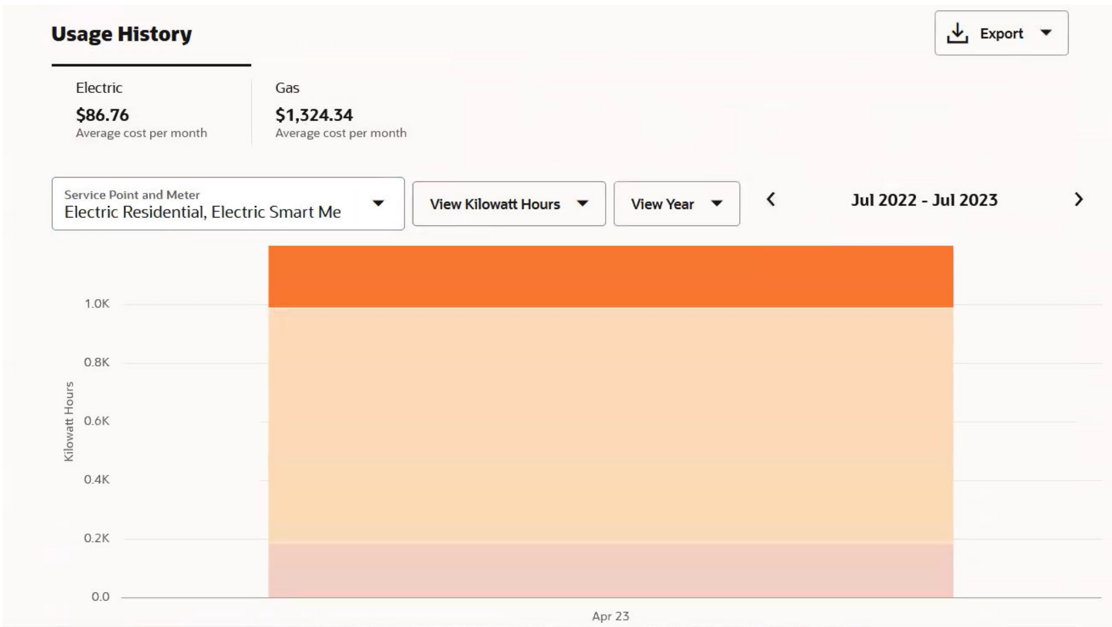
As you select different tabs and options, the system renders the usage chart based on your selections.

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:**
>
> 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.

This image shows an example of the Usage History section of the Premise screen:

Figure 6-3 Usage History



Access Usage History from the Premise Screen

To access usage history information from the Premise screen:

1. Access the Premise screen.
2. From the Usage History section, select the sub-tab with the service type you want to view.
3. The system displays the usage chart with the default options.
4. Use these options to change your display:
   - Select a different service type sub-tab.
   - Select a different service point and meter.
   - Select a different unit of measure.
   - Select a different level of detail from the View filter.
   - Scroll left and right to view a different date range.
5. Hover over a bar to view usage details.
6. Click on a bar to display a more detailed chart, if available.

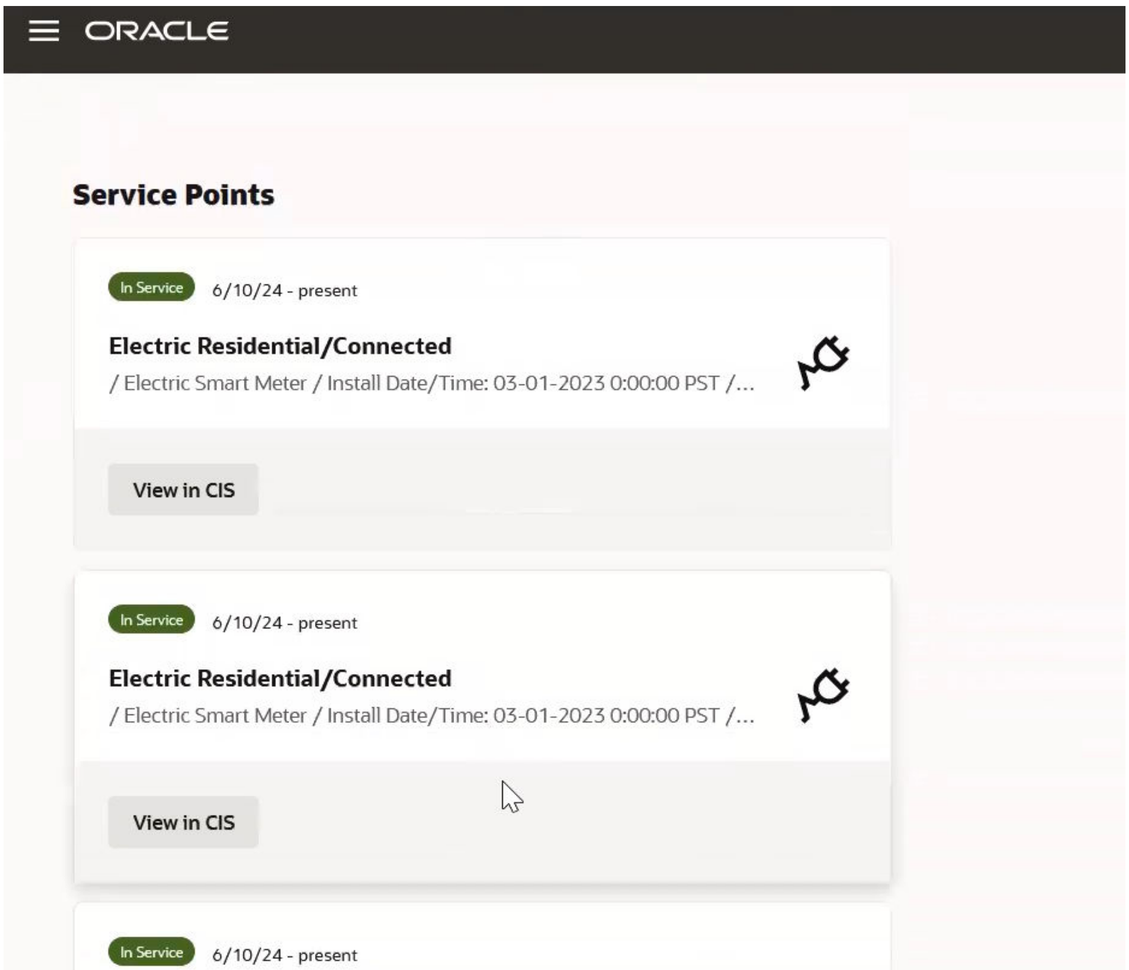
Viewing Service Points for a Premise

The Service Points section appears at the bottom of the Premise page, and provides a card for each service point that is available at the premise. Each card provides:

- Status information to specify whether the service point is in service
- The dates that the service point has been in service
- The type of service associated with the service point
- The type of meter associated with the service point
- The date and time the service point was installed
- A button to access the service point in the customer information system

This image shows an example of the Service Points section of the Premise screen:

Figure 6-4 Service Points



Access Service Point Information for a Premise

To access service point information from the Premise screen:

1. Access the Premise screen.
2. From the Service Points section, click the **View in CIS** button on a service point card.
3. The system opens the service point in your customer information system. For additional information about viewing and managing service points, see "Service Points" in the Business User Guide associated with your Oracle Utilities customer information system, which is available in the Energy and Water Help Center.

Viewing Activities for a Premise

When you access the Premise screen, you can view specific field activities that the utility has had that are associated with the premise. The Activity panel displays the most recent field activities, and includes a View all activities link at the bottom.

Field activities are specific types of tasks performed by utility field personnel. For example, manual installation of a physical meter, severance processes, and stopping, starting, or transferring service. 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.

Activities that are associated with a customer, such as phone calls or chats, are not displayed here.

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.

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.

View Activities from the Premise Screen

To view activities from the Premise screen:

1. Access the Premise screen.
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.

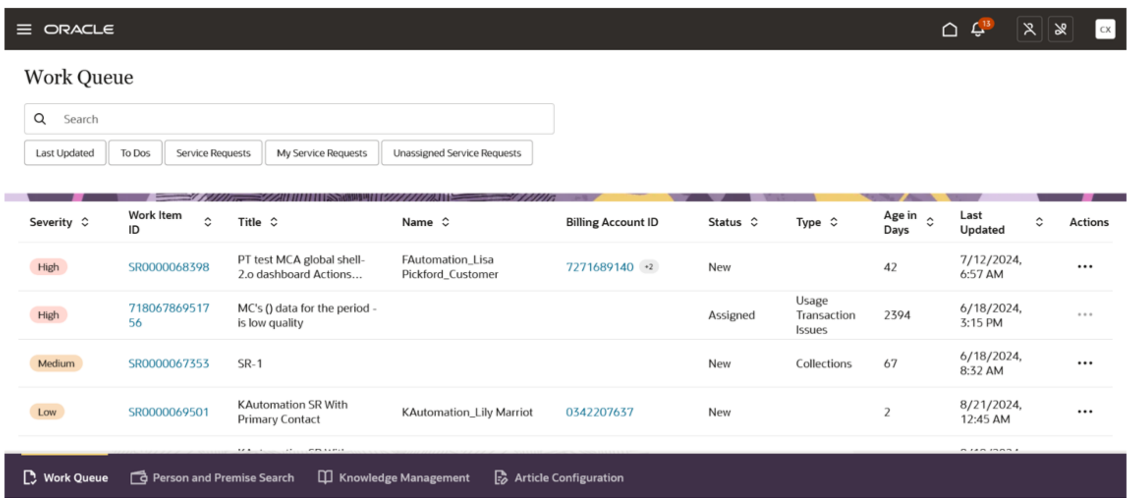
7

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:

Figure 7-1 Work Queue



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

- **Last Updated:** 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 retrieve additional to dos that the system assigns to them.
- **Service Requests:** Click this filter button to display only service requests. Note that the system shows service requests that are assigned to you or are unassigned.
- **My Service Requests:** Click this filter button to display only service requests that are assigned to you.
- **Unassigned Service Requests:** Click this filter button to display only service requests that have not been assigned.

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.

> **Note:**
>
> 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 in the Work Item ID column to open the record in a new browser tab, where you can continue your work.
- Click on the hyperlink in the Billing Account ID to view customer information.
- Edit billing account information associated with a service request.

For additional information about working with service requests, to do tasks, and customers, see:

- The "Work with Service Requests" topic in the Oracle Fusion Service Help Center.
- "To Do Processing" in the Business User Guide associated with your Oracle Utilities customer information system. Documentation for these systems is available in the Energy and Water Help Center.
- Managing Customers and Accounts.
- Identifying High-Priority Service Requests and To Dos
- Managing Service Requests and To Dos
- Assigning Service Requests and To Dos to Yourself
- Editing Billing Accounts on a Service Request

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.

Identify Items that Need Attention

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. Use these filter chips, as needed, to narrow your list of service requests:

- Last Updated
- Service Requests
- My Service Requests
- Unassigned Service Requests

6. When you have found the service request you want to view or update, click the hyperlink in the **Work Item ID** column for the row you want to access. Alternatively, you can click the hyperlink in the **Billing Account ID** column to access the customer.
7. For additional information, see:
   - "Working with Service Requests" topics in the Oracle Fusion Service Help Center.
   - "To Do Processing" in the Business User Guide associated with your Oracle Utilities customer information system. Documentation for these systems is available in the Energy and Water Help Center.
   - Managing Customers and Accounts

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.

Managing Service Request

To manage service requests:

1. Access CX for Utilities Agent Service.
2. Select the Work Queue page tab.
3. Use filter buttons as needed to narrow your results, which include:
   - Service Requests
   - My Service Requests
   - Unassigned Service Requests
4. To search for service requests that were last updated during a specific date range:
   - Click the **Last Updated Date** filter 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.
5. 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 - This is the name of the account.
   - Service request number
   - Key word included in the service request description
6. Click the **Sort** icon next to one of the column headings. By default, the column is sorted in ascending order.

7. Click the icon again to sort in descending order. Note that you can sort by only one column heading at a time.
8. Use additional filter fields as needed, which include:
   - My Service Requests
   - Unassigned Service Requests
9. When you have found the service request you want to view or update, click the hyperlink in the **Work Item ID** column for the row you want to access. Alternatively, you can click the hyperlink in the **Billing Account ID** column to access the customer.
10. 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 brings you back to the Work Queue on your current browser tab.
11. When you are finished working on the service request, be sure to close all tabs that are no longer needed.
12. For additional information, see:
    - "Working with Service Requests" topics in the Oracle Fusion Service Help Center
    - Managing Customers and Accounts

Manage To Do Tasks

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 hyperlink in the **Work Item ID** column. The to do opens in a new browser tab, where you can continue your work. Alternatively, click on the hyperlink in the **Billing Account ID** column to access customer information.
8. Additionally, you can assign additional to dos to yourself.
9. For additional information, 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 Energy and Water Help Center.
   - Managing Customers and Accounts

Assigning Service Requests and To Dos to Yourself

When you access your Work Queue, you can search for service requests and to do tasks that have not yet been assigned to an agent.

Assign 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. Optionally, click on the **Unassigned Service Requests** filter button to display only records that are not yet assigned.
5. 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.
6. 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.
7. For additional information and instructions on working with service requests, see the "Working with Service Requests" topics in the Oracle Fusion Servie Help Center.

Assign a To Do to Yourself

When you access your Work Queue, you can retrieve unassigned to-do tasks that you can work on. When you retrieve an additional to do, the system automatically assigns it to you and then displays it in the Work Queue.

To retrieve a to do and assign it 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 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.

For additional information about viewing or editing service requests in Oracle Fusion Service, see Service Requests in the Using Service Center Guide.

Add, Edit or Remove Items from a Service Request

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.
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".

- Manage Billing Accounts, Premises, and Service Points

Manage 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 Sales 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, 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 Items

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

1. Access the <Entity Page Title>: Billing Accounts form. Your navigation to this form is determined by the entity you are adding billing accounts to.
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 and Close**.
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 and Close**.
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 and Close**.
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 **Continue**.

8 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 to manage their phone status, answer calls, and enter wrap-up and resolution notes to a call directly from CX for Utilities Agent Service.

By default, your calls that come in to your agents are routed as follows:

- **Known Caller:** The system opens the Customer Dashboard after the agent accepts the call.
- **Unknown Caller:** The system opens the Person and Premise Search after the agent accepts the call. Once an unknown caller is verified and changes to a known caller, the system opens the Customer Dashboard.

Optionally, your utility can turn on the following features:

- **Close All Open Windows Reminder:** When you enable this feature, a window automatically pops up when an agent ends a call to reminder them to close all open customer records that are associated with the previous call. This feature helps your agents safeguard customer information.
- **AI Generated Wrap-Up Notes:** During wrap-up of a chat or voice call, the wrap-up dialog can include an automatically generated summary of the conversation, if the configuration is set to do so. The human agent can edit the draft before saving, if desired.
- **AI Generated Knowledge Article Suggestions:** With Generative AI enabled for the Redwood Service Center, telephony partners can enable call snippets. If call snippet and voice to text transcription are enabled, the suggestions will be generated based on the live transcript captured during the call. The snippet suggestion panel displays three suggestions at a time. The suggestion list contains recommended knowledge articles, some descriptive text, and a source document link or the knowledge article link. Agents have the ability to send the knowledge article via an email if the telephony partner has configured messaging services. Agents also have the ability to share the knowledge article via text when the phone call is from a known contact.

> **Note:**
>
> The call features discussed here are available only to users that have the customer service agent role assigned to them.

For additional details on using and enabling these features, see:

- 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 Guide, available in the Oracle Fusion Service library.
- For information about configuring CTI features, see Computer Telephony Integration Tasks in the *Implementing Customer Experience for Utilities Guide*.
- For information on using and enabling the call wrap up notes feature, see Generate Wrap Up Notes at the Conclusion of a Call or Chat.

- For information using and enabling the article suggestions feature, see Assist agent phone communications with article suggestions.
- For general information about Fusion Service AI features, see Oracle AI for Fusion Applications

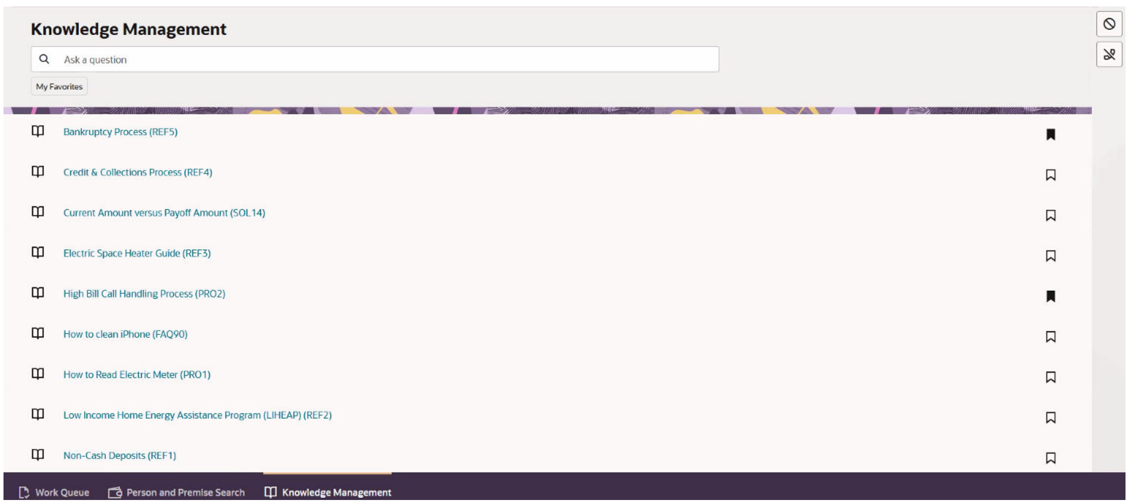
9 Using Knowledge Management

You can use the Knowledge Management page tab to access articles that can help you solve service requests and respond to caller inquiries. From the Knowledge Management page tab you can search for articles that are related to your issue, select articles to view their contents, and add or remove articles from your list of favorites.

After you select an article, you can rate it to provide your article administrators with feedback on which articles are valuable and which articles need to be improved.

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

Figure 9-1 Knowledge Tab



You can also use AI features to generate recommended knowledge articles that you can send to a customer based on the transcript of a phone conversation. This features is enabled and managed in the Oracle Fusion Service system. See Using Call Features for additional information.

When you access an article, you are using the Knowledge Management system, which is part of Oracle Fusion Service. For additional information on how to use the Knowledge Management features, see:

- The Use Knowledge Management topics in the Oracle Fusion Service Help Center.
- Knowledge Management Implementation Tasks in the Implementing Customer Experience for Utilities Guide.

View and Manage Knowledge Articles

To view and manage Knowledge Management articles:

1. Select the Knowledge Management tab.
2. To search for articles, complete one of these steps:

- Enter search criteria in the **Ask a question** field at the top of the screen and then hit Enter. This option will display all articles that match your criteria.
- Click the **My Favorites** filter button. This option displays all of your favorite articles. This filter option is available only if you have marked at least one article as a favorite.
- Enter search criteria and hit **Enter**, and also click the **My Favorites** filter. Using both options together displays only favorite articles that also match your search criteria.

3. The system displays a list of articles that meet your search criteria.
4. To mark an article as a favorite, click the **Bookmark** icon to the right of the article. Click the icon again to remove the article from your favorites. Favorites are displayed with a black bookmark.
5. Click on an article title to view the details.
6. In addition to viewing the article text, you can perform these optional tasks:
   - 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.
   - Provide feedback on the article by clicking the **Suggest a Change** button at the top of the screen.
   - Add the article to your favorites by clicking the **Add to Favorites** button at the top of the screen.
7. Click the Knowledge Management link at the top left to return to the list of articles.

10 Exporting Data from Agent Service

Many utility agents need to create reports to analyze data, or provide printed information to their managers or customers. To facilitate these tasks, agents can export data from multiple places within the Agent Service solution.

Data that can be exported is noted with an Export button or icon. When you click the button or icon, you can select the export format for your data. The available options vary, depending on the data you are exporting, but can include:

- Excel
- CSV

After you select an option, the system displays the Export started message. The export must complete before you can continue working.

Be aware that system administrators can restrict the number of rows that can be exported to manage performance. If your data set exceeds the configured threshold, the system displays a message indicating how many rows of the data set were exported.

Glossary

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