

Using CX for Utilities Sales

Oracle Fusion Release 24B

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Title and Copyright Information

Using CX for Utilities Sales, Oracle Fusion Release 24B

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About This Guide

This chapter contains the following information:

- Audience and Scope
- Related Guides

Audience and Scope

If you're looking for information about how your key account managers can perform day-to-day tasks in your CX for Utilities applications, then this guide is for you. The information is primarily aimed at employees and managers who are responsible for sales and service tasks associated with key accounts at a utility company.

This guide describes how to:

- Access CX for Utilities Sales
- Use the Business List
- Use Account 360 to:
 - View account insights and activities
 - View billing information
 - View usage information
 - View service requests
 - View and manage leads and opportunities

Related Systems and Guides

Refer to the related documentation listed in this table to understand more about flows and functions covered in this guide.

Oracle System	Related Documentation
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

Oracle System	Related Documentation
	<p>solutions, see Implementing CX for Utilities in the Oracle Customer Experience for Utilities library.</p>
<p>CX for Utilities Agent Service</p>	<p>Several features discussed in this guide are shared between CX for Utilities Sales and CX for Utilities Agent Service. These experiences, which are both part of the Oracle CX for Utilities solution, can be used together to provide a robust set of features for your utility sales and service employees.</p> <p>Documentation for all features in these experiences can be found in the Oracle Customer Experience for Utilities library.</p>
<p>Oracle Utilities Customer Information System (CIS), which can be:</p> <ul style="list-style-type: none"> ▪ Oracle Utilities Customer Cloud Service ▪ Oracle Utilities Customer to Meter 	<p>CX for Utilities Sales requires a supported Oracle Utilities CIS. See the following to access user and administrator documentation:</p> <ul style="list-style-type: none"> ▪ Oracle Utilities Customer Cloud Service library ▪ Oracle Utilities Customer to Meter library
<p>Oracle Fusion Service, which includes:</p> <ul style="list-style-type: none"> ▪ Knowledge Management ▪ Service Requests ▪ Computer Telephony Integration (CTI) 	<p>CX for Utilities Sales provides access to some features that are inherent to Oracle Fusion Service. See the Using Knowledge Management for additional information about using Knowledge Management.</p> <p>For information about using service</p>

Oracle System	Related Documentation
	<p>requests and call features, see the following topics in the Using Service Center in the Redwood User Experience Guide:</p> <ul style="list-style-type: none"> ▪ Service Requests ▪ Calls
<p>Oracle Digital Sales, which includes:</p> <ul style="list-style-type: none"> ▪ Contacts ▪ Accounts ▪ Leads ▪ Opportunities ▪ Activities 	<p>CX for Utilities Sales provides access to some features that are inherent to Oracle Digital Sales. See the Using Digital Sales (Next Gen Sales) Guide for information on using Digital Sales.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>To use all sales features that are available in this experience, you must disable the Redwood User Experience for Oracle Sales.</p> </div>

Overview

CX for Utilities Sales simplifies standard work processes for account managers at a utility company by providing a variety of tools that reduce the cost-to-serve, provide elevated customer service, and enable an efficient sales cycle. This solution integrates the Oracle Digital Sales and Oracle Fusion Service applications with these Oracle Utilities customer information systems:

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

The core capabilities of CX for Utilities Sales include:

- View and access current and potential key accounts using the Business List.
- Use Account 360 to manage key accounts, which includes:

- Account 360 Spotlight, which you use to:
 - View account contacts.
 - View account hierarchy.
 - Update and manage account details.
 - Mark an account as a favorite.
 - Create notes, appointments, and tasks, and send emails.
 - Search for and select billing accounts.
- Premise and Service Details page, which you use to view a hierarchical list of the details associated with a selected billing account.
- Needs Analysis Dashboard, which you use to:
 - Launch a needs analysis interview.
 - Complete an in-progress interview.
- Overview tab, which you use to:
 - View account insights.
 - View pending and recently completed tasks for an account.
- Billing tab, which you use to:
 - View aggregate billing data for all child accounts.
 - Compare billing data for up to 20 billing accounts.
 - View billing and financial history for billing accounts.
 - Export data to PDF, CSV, and Excel formats.
 - Answer common customer questions, such as:
 - What is my balance?
 - When will my next bill be generated?
 - Are payments being made on time?
 - How much have I been billed over the last 12 months?
- Usage tab, which you use to:
 - Compare usage data for up to 20 billing accounts.
 - View the Usage Map for a selected billing account.

- Access usage history by year, bill period, and day.
- Export data to PDF, CSV, and Excel formats.
- Service tab, which you use to:
 - Access resolved and unresolved service requests for an account.
 - Create a new service request.
 - Access Oracle Service Center, where you can modify the details of a service request.
- Leads and Opportunities tab, which you use to:
 - View all of the leads and opportunities associated with an account.
 - Create leads and opportunities.
 - Qualify and retire leads.
 - Convert leads to opportunities.
 - View all leads and opportunities in Oracle Digital Sales, where you can perform additional tasks.

Several features discussed in this guide are shared between CX for Utilities Agent Service and CX for Utilities Sales. 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. Documentation for all features in these experiences can be found in the [Oracle Customer Experience for Utilities library](#).

Additional capabilities that are shared between CX for Utilities Agent Service and CX for Utilities Sales include:

- View the Work Queue and manage open service requests and to do tasks.
- Search for and view articles in the Knowledge Management system that can help answer your customer's questions.
- Use call features to set your availability and receive inbound calls.

Here are some examples of common journeys a key account manager might take:

User Journey	For More Information
<p>The key account manager receives a call from the accounting department of an existing customer. They have concerns about their latest bill. The key account manager uses the Business List to locate the account and opens Account 360.</p> <p>Using the Billing Account Comparison chart, the key account manager identifies one billing account that has a much higher balance than the others. The key account manager can then view the financial history associated with that billing account to determine what the issue is.</p>	<p>See these topics:</p> <ul style="list-style-type: none"> ▪ Using the Business List ▪ Using Account 360 ▪ Using the Billing Tab
<p>The key account manager is preparing to meet with one of their customers and needs to provide them with a summary of their bills over the last year.</p> <p>The key account manager uses the Business List to locate the account and opens Account 360. The key account manager exports the Billing Account Comparison chart as a PDF to print and share during their meeting.</p>	<p>See these topics:</p> <ul style="list-style-type: none"> ▪ Using the Business List ▪ Using Account 360 ▪ Exporting Billing Data
<p>The key account manager recently learned that their account plans to open 10 new warehouses in the state of California in the next 5 years. The key account manager uses the Business List to locate the account and opens Account 360. The key account manager navigates to the Usage tab and selects the accounts located in California to build a usage comparison chart. The key account manager analyzes the usage of these billing accounts to forecast the impact to the utility's grid.</p>	<p>See these topics:</p> <ul style="list-style-type: none"> ▪ Using the Business List ▪ Using Account 360 ▪ Using the Usage Tab

User Journey	For More Information
<p>The key account manager is in a meeting with multiple stakeholders from their account and someone mentions that the utility crew that recently changed meters damaged the property. The key account manager uses the Business List to locate the account and opens Account 360. The key account manager navigates to the Service tab and doesn't see any service requests related to this issue. The key account manager creates a service request to ensure that they follow-up with the customer and repair or reimburse the damage.</p>	<p>See these topics:</p> <ul style="list-style-type: none"> ▪ Using the Business List ▪ Using Account 360 ▪ Using the Service Tab
<p>A new key account manager is getting up-to-speed on an account. The key account manager uses the Business List to locate the account and opens Account 360. While reviewing billing accounts, the key account manager sees that one of the billing accounts has many premises by way of the premise indicator badge. The key account manager opens this billing account and selects the Premise and Service Details page. The key account manager expands the premise tree to learn more about the contracts, service points, devices, and components associated with the account.</p>	<p>See these topics:</p> <ul style="list-style-type: none"> ▪ Using the Business List ▪ Using Account 360 ▪ Viewing Premise and Service Details

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 Sales. The main areas to be aware of include:

Business List

- The Business List provides you with a list of all accounts you can view. You can choose to view:

- My Accounts
- Favorite Accounts
- All Accounts
- Search for accounts by name, primary address, contact information, industry, billing account ID, or premise address to easily access a specific account.
- Access Account 360.

Account 360

- View basic account information in the Account Spotlight, such as the primary contact and primary address.
- View contacts associated with the account.
- View the Oracle Fusion account details.
- View the account team.
- Mark an account as a favorite.
- View account insights.
- View and manage activities and tasks.
- View and compare billing information for selected billing accounts.
- View and compare usage information for selected billing accounts.
- View resolved and unresolved service requests.
- View and manage sales leads and opportunities.

Work Queue

- The Work Queue provides easy access to all service requests and to do tasks to which the logged-in user 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 your Oracle Utilities customer information system.
- The Work Queue is part of CX for Utilities Agent Service as well as CX for Utilities Sales. For additional information, see [Use the Work Queue](#).

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. Key account managers are able to access all published articles from the interface.

- The Knowledge Management page tab is part of CX for Utilities Agent Service as well as CX for Utilities Sales. 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.
 - Using the Knowledge Management page tab, see [Use Knowledge Management](#).

Call Features and Computer Telephony Integration (CTI)

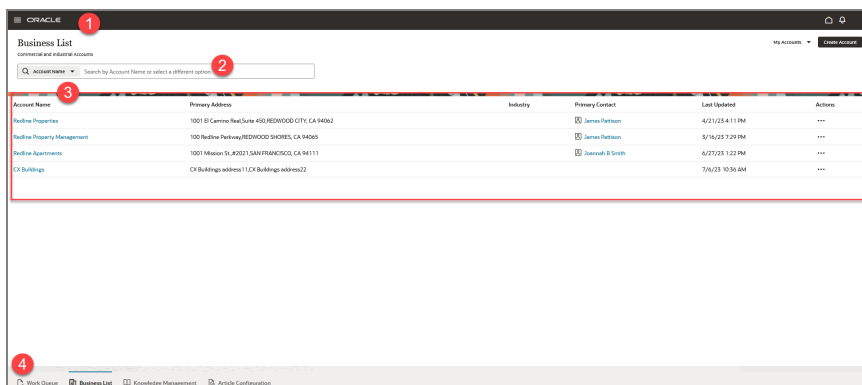
- If your solution is set up to use Oracle's CTI features, utility employees can manage their phone status, answer phone calls, and enter wrap up and call resolution notes directly from the interface.
- Call feature integration is used in both CX for Utilities Agent Service and CX for Utilities Sales. For information about using call features, see [Use Call Features](#).

Accessing CX for Utilities Sales

When you log into CX for Utilities Sales, you are brought to the Business List page tab by default. System administrators can change the default landing tab by role or by user as needed, using profile options.

The page tabs that are displayed at the bottom of the screen are also determined by your user role.

This image shows an example of the Business List page tab, and identifies some of the main areas:



Page Area	Description
<p>1. Oracle Global Header</p>	<p>This is the standard Oracle Global Header. You use this header to:</p> <ul style="list-style-type: none"> ▪ Access other Oracle Fusion systems and applications. ▪ Log in and out. ▪ Access your Oracle Fusion home page. ▪ Access and edit your profile. ▪ Manage notifications. <p>For additional information on using the Oracle header, see the Get Started chapter of the <i>Using Common Features Guide</i>, available in the Oracle Help Center.</p>
<p>2. Search Bar</p>	<p>Use the search bar to locate the accounts you want to view and manage. Search bars appear at the top of most of the page tabs.</p>
<p>3. Work Area</p>	<p>This portion of the screen is the work area, and it changes depending on which page tab you select and which task you are completing. Use this section of the screen to select and manage records.</p>
<p>4. Page Tab Area</p>	<p>This portion of the screen displays the different page tab options that are available to you. They include:</p> <ul style="list-style-type: none"> ▪ Work Queue ▪ Business List ▪ Knowledge Management ▪ Article Configuration (Available only for users assigned to the CSR Manager or KAM Service Manager roles.) <div style="border: 1px solid black; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p>The Work Queue, Knowledge Management, and Article Configuration page tabs are used in both CX</p> </div>

Page Area	Description
	<p>for Utilities Agent Service and CX for Utilities Sales. Additional page tabs, such as the Person and Premise Search, might also be available if your organization uses both CX for Utilities Agent Service and CX for Utilities Sales, and you are assigned to multiple user roles. For information about the page tabs that belong to CX for Utilities Agent Service, see Using CX for Utilities Agent Service.</p>

Accessing CX for Utilities Sales

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

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

To access the solution:

1. From the Oracle Fusion Home Page, click the menu button at the top left of the screen.
2. Select **Digital Sales** or **Service**, and then click the **Utility Accounts** button. The availability of this button under the Sales and Service menu options is based on your user role, as follows:
 - The **Utility Accounts** button is available under the **Digital Sales** menu for KAM Sales, KAM Sales Supervisors, and KAM Administrator roles.
 - The **Utility Accounts** button is available under the **Service** menu for KAM Service, KAM Service Supervisors, and KAM Administrator roles.
3. By default, the system displays the **Business List**: page tab.

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

Using the Business List

The Business List is your main screen to find and manage your key accounts. You use the Business List to:

- View your assigned accounts, favorite accounts, or all accounts
- Search for specific accounts
- Access key account data in Account 360

The Business List has multiple views that you can choose from to search for and display account records, which include:

- **My Accounts:** This view is displayed by default when you access the Business List, and the records that appear in the work area include the following, depending on the role of the logged in user:
 - Non-manager roles will see only the accounts for which they are designated as the owner.
 - Supervisors will see all of the accounts for which they are designated as the owner and also all of the accounts owned by the employees who report to them.
- **Favorites:** This view displays all accounts that the logged-in user has marked as a favorite.
- **All accounts:** This view displays all Oracle Fusion accounts.

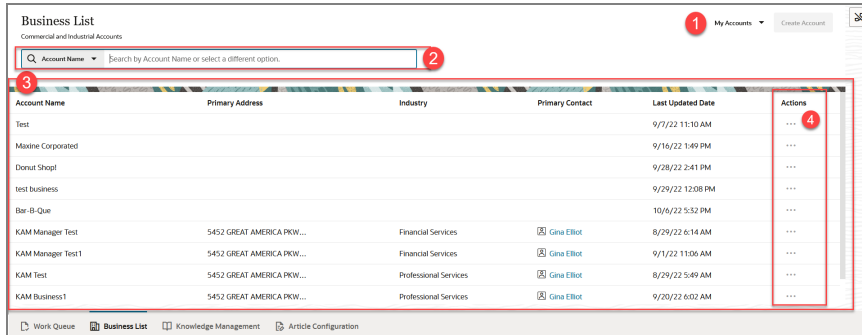
The records that display in the business list can be:

- **Customers:** These records represent Oracle Fusion accounts that are associated with one or more utility billing accounts. These can be parent or child accounts.
- **Prospects:** These records represent businesses that exist as Oracle Fusion accounts, but are not connected to any utility billing accounts.

Once you have located the record you want to view or manage, you can use the Business List to:

- View the primary contact information for the account
- Access the Oracle Fusion Contact page for the primary contact
- Use the Action menu options to add notes, activities, and other items to an account
- Access Account 360 to manage data and transactions

This image identifies the main areas of the Business List screen:



This table describes the main areas that appear on the Business List screen:

Page Area	Description
1. Account View Button	<p>Use this button to specify which accounts you want to view. You can choose:</p> <ul style="list-style-type: none"> ▪ My Accounts (default) ▪ Favorite Accounts ▪ All Accounts <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>Be aware that the selection you choose here works in conjunction with the text you enter in the search bar. For example, if you select My Accounts, and then search for a business name, it will appear in your search results only if the account is assigned to you.</p> </div>
2. Search Bar	<p>Use the options in this section of the form to search for the account you want to view. You can search by:</p> <ul style="list-style-type: none"> ▪ Account name

Page Area	Description
	<ul style="list-style-type: none"> ▪ Primary address ▪ Contact information, which includes: <ul style="list-style-type: none"> ▪ Name ▪ Address ▪ Phone number ▪ Email ▪ Industry ▪ Billing account ID ▪ Premise address
3. Detail Area	<p>This section of the form displays your search results. Each record contains the following information from the Oracle Fusion account:</p> <ul style="list-style-type: none"> ▪ Account Name ▪ Primary Address ▪ Industry ▪ Primary Contact ▪ Last Updated Date <p>You can perform the following actions on each record:</p> <ul style="list-style-type: none"> ▪ Hover over the Primary Contact icon to view contact details. ▪ Click the Primary Contact hyperlink to access the Oracle Fusion Contact page. <p>If the record is attached to one or more billing accounts (and is therefore considered a customer), you can click on the record to access Account 360.</p>
4. Action Menu	You can use the Action menu that appears on each record in

Page Area	Description
	<p>the Business List to:</p> <ul style="list-style-type: none"> ▪ Create Contact: This option enables you to create a new contact associated with the selected account. ▪ Create Service Request: This option enables you to create a new service request associated with the selected account. ▪ Create Lead: This option enables you to create a new sales lead associated with the selected account. ▪ Create Opportunity: This option enables you to create a new sales opportunity associated with the selected account. ▪ Create Note: This option enables you to create a new note activity associated with the selected account. ▪ Create Appointment: This option enables you to create a new appointment activity associated with the selected account. ▪ Create Task: This option enables you to create a new task activity associated with the selected account. ▪ Log a Call: This option enables you to log the details about a phone call you had with the selected account. ▪ Create Email: This option enables you to create a new email activity associated with the selected account. <p>When you select any of these action menu items, a new tab opens and displays the appropriate screen from the Oracle Digital Sales system. When you are done creating the record, you can save it and close the tab to return to the Business List.</p>

For additional information about managing Oracle Fusion accounts, including how to create contacts, leads, opportunities, and activities, see the following items in the [Using Digital Sales Guide](#):

- Accounts and Contacts
- Leads

- Appointments and Tasks
- Email

Additionally, see the [Using Service Center in the Redwood Experience Guide](#) for information about working with service requests.

Searching for Key Accounts

When you have questions, issues, or tasks that need to be completed for an account, you can search for that account in the Business List so you can access necessary account information.

To search for account records:

1. [Access CX for Utilities Sales](#).
2. Select the **Business List** page tab.
3. Select one of these options at the top of the screen to specify which accounts you want to search for:
 - **My Accounts** This view is displayed by default when you access the Business List, and the records that appear in the work area will include the following, depending on the role of the logged in user:
 - Non-manager roles will see only the accounts for which they are designated as the owner.
 - Supervisors will see all of the accounts for which are designated as the owner and all of the accounts owned by the employees who report to them.
 - **Favorites:** This view displays all accounts that the logged-in user has marked as a favorite.
 - **All Accounts:** This view displays all Oracle Fusion accounts.
4. In the **search** field, select one of the following:
 - **Account name**
 - **Primary Address**
 - **Contact information**

If you use this option, you must also select a sub type, which includes name, address, phone number, or email.

- **Industry**
- **Billing account ID**
- **Premise address**

5. Enter your search text in the search bar, and then hit **Enter**.

Be aware that the text you enter in the search bar works in conjunction with the view you have selected. For example, if you select **My Accounts**, and then search for a business name, it will appear in your search results only if the account is assigned to you.

6. Notice that the search bar now contains your search term.
7. To remove search criteria from your search, click the **X** at the end of the search bar.
8. When you have found the account you want to view or update, continue to one of these tasks:
 - [Access contact information](#)
 - [Access Account 360](#)

Accessing Primary Contact Information

When you need to speak with a representative from an account, you need to know who the primary contact for the account is, and how to contact them. To use these steps to access contact information, the contact must be marked as the primary contact on a key account.

To access primary contact information:

1. [Search for the account](#) you want to view.
2. In the search results area, you can hover over the primary contact to view contact details.
3. To access additional information about the contact, click on the contact name to access the Oracle Fusion Contact record.
4. For information about using the Contact Page, see the Accounts and Contacts chapter in the [Using Digital Sales Guide](#).

Using Action Menu Options on the Business List

To manage key accounts, you often need to associate additional records with the account, such as leads, service requests, or appointments. To create these additional records, you can search for the account you want to manage in the Business List, and then choose from a list of action menu items, which include:

- **Create Contact:** This option enables you to create a new contact associated with the selected account.
- **Create Service Request:** This option enables you to create a new service request associated with the selected account.
- **Create Lead:** This option enables you to create a new sales lead associated with the selected account.
- **Create Opportunity:** This option enables you to create a new sales opportunity associated with the selected account.
- **Create Note:** This option enables you to create a new note activity associated with the selected account.
- **Create Appointment:** This option enables you to create a new appointment activity associated with the selected account.
- **Add to Favorites/Remove from Favorites:** This option enables you to mark an account as a favorite, or remove it from your list of favorite accounts. When marked as a favorite, the option reads **Remove from Favorites**. When not marked as a favorite, the option reads **Add to Favorites**, and the account is then viewable when you use the **Favorites** option on the Business List.
- **Create Task:** This option enables you to create a new task activity associated with the selected account.
- **Log a Call:** This option enables you to log the details of a call you had with the selected account.
- **Send Email:** This option enables you to create and send a new email activity associated with the selected account.

When you select any of these action menu items, a new tab opens and displays the appropriate screen from the Oracle Digital Sales or Oracle Fusion Service system. When you are done creating the record, you can save it and close the tab to return to the Business List.

For additional information about managing Oracle Fusion accounts, including how to create contacts, leads, opportunities, and activities, see the following items in the [Using Digital Sales Guide](#):

- Accounts and Contacts
- Leads
- Opportunities
- Appointments and Tasks
- Email

Additionally, see the [Using Service Center in the Redwood User Experience Guide](#) for information about working with service requests.

To perform account-related actions from the Action menu:

1. [Search for your account](#).
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:
 - Create Contact
 - Create Service Request
 - Create Lead
 - Create Opportunity
 - Add to Favorites or Remove from Favorites
 - Create Note
 - Create Appointment
 - Create Task
 - Send Email
3. The system opens the associated screen in the Oracle Digital Sales system in a new tab.

Be aware that this step, and the remaining steps in this task are not applicable for the Add to/Remove from Favorites option.
4. Create your record as needed, and then save your changes.
5. Once you have saved your record, you can close the tab to return to the Business List.

Accessing Account 360

When an account manager has questions or issues they need to resolve for a key account, they can access detailed information about that account in Account 360. This

information enables account managers to easily view and access the information they need to manage the account.

To access Account 360:

1. [Search for the account](#) you want to view.
2. Click anywhere on the account record, other than the **Primary Contact** field.
3. The Account 360 page opens with your selected account. The tab that is displayed by default depends on your assigned role.
4. See [Using Account 360](#) for additional information.

Using Account 360

You use Account 360 to manage your key utility accounts. Account 360 provides easy access to important information, transactions, and historical data associated with the account. The date range available for viewing is determined by the Historical Data Range Profile Option, which is set by your utility. By default, you can view 3 years of historical data.

You access Account 360 for key accounts by searching for and selecting an account from the Business List. Account 360 is available for all Oracle Fusion account records, however, the information that is available in Account 360 varies depending on whether the account is linked to one or more utility billing accounts. For example, billing and usage information is displayed only for accounts that are associated with one or more billing accounts.

You use Account 360 to complete these tasks:

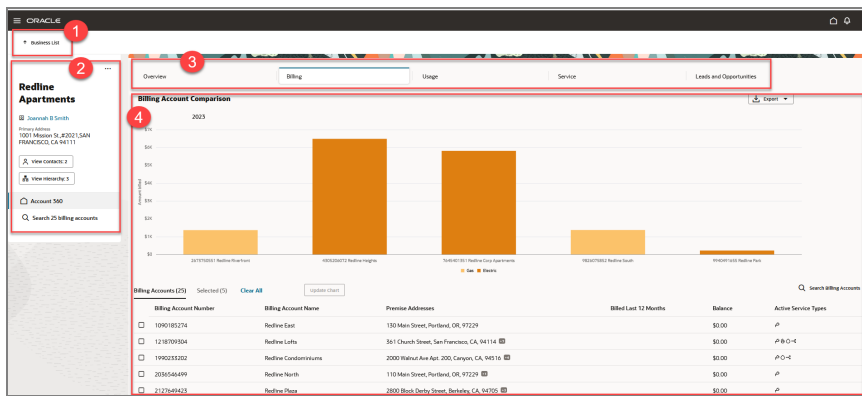
- Use the Account Spotlight to:
 - View primary contact and address information
 - Access the account hierarchy view to understand parent and child account relationships
 - Access contacts associated with the account
 - Access Oracle Fusion account details
 - Access the sales team
 - Mark an account as a favorite or remove an account from favorites
 - Create tasks, notes, and appointments for an account

- Send emails
- Search for and navigate to billing accounts,
- View premise and service details for a selected billing account
- Use the Needs Analysis Dashboard after selecting a billing account to:
 - Launch a needs analysis interview
 - Complete interviews that are in progress
- Use the Overview tab to:
 - View account insights
 - View a list of current tasks and activities associated with the account
- Use the Billing tab to:
 - Select billing accounts to compare billing data
 - View billing highlights
 - View the Bill History chart
 - View financial history details
 - Export data
- Use the Usage tab to:
 - Select billing accounts to compare usage data
 - View a list of service contracts and see locations on a map
 - Search for and select service contracts to view service contract usage
 - Export data
- Use the Service tab to:
 - View service requests associated with the account
 - Create service requests
 - Export data
- Use the Leads and Opportunities tab to:
 - View the most current leads and opportunities
 - Qualify, convert, and retire leads
 - Attach activities and emails to a lead or opportunity

- Create a new lead or opportunity
- View and manage additional lead and opportunity details in Oracle Digital Sales

As you navigate through the different tabs in Account 360, you can use search features and filters to find and select specific billing accounts associated with the selected account, or to display data for specified date ranges. If you update a chart or table to display data for specific billing accounts and dates, and then you navigate to one of the billing accounts, when you return, the data displayed in Account 360 remains as it was. When you navigate away from Account 360 (for example, by returning to the Business List), the data is reset when you access Account 360 again.

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



This table describes the main areas of Account 360:

Page Area	Description
1. Return to Parent Page	Use this option to return to the previous page. The page you will return to is displayed next to the arrow. For example, when on the main Account 360 page, you can click this option to return to the Business List.
2. Account Spotlight	Use the Account Spotlight area to: <ul style="list-style-type: none"> ■ View primary contact and address information ■ View all contacts associated with the account

Page Area	Description
	<ul style="list-style-type: none"> ▪ View account hierarchy ▪ Access the action menu, which allows you to: <ul style="list-style-type: none"> ▪ Access the Oracle Fusion account details ▪ View the account team ▪ Mark an account as a favorite or remove an account from your favorites ▪ Create a note, appointment, or task for the account ▪ Send an email ▪ View the main Account 360 screen (default) ▪ Search for billing accounts related to the selected account
3. Account Tabs	<p>Use the tabs across the top of the Account 360 screen to view and manage different types of account information. By default, the Overview tab is displayed. When you click on a tab, the information in the work area changes.</p>
4. Work Area	<p>The work area is where you can view and manage account information. The information that displays in the work area depends upon:</p> <ul style="list-style-type: none"> ▪ The page tab or option that is selected ▪ Whether you are viewing a Fusion account or billing accounts

Using the Account 360 Spotlight

You use the Spotlight section of Account 360 to view information about the account and to perform actions that are associated with the account. The Spotlight enables you to:

- View primary contact and address information
- Access all contacts associated with the account
- Access the account hierarchy view to:
 - Understand parent and child account relationships
 - Compare billing, service, and sales data across child accounts in the hierarchy
- Access the action menu, which allows you to:
 - Access Oracle Fusion account details
 - Access the sales team
 - Mark an account as a favorite or remove an account from favorites
 - Create a note, appointment, or task for the account
 - Send an email

Viewing Account Contacts

When you are dealing with large commercial or industrial accounts, there are typically multiple people at the company or organization that are listed as contacts. In addition to viewing the primary contact on the Account 360 Spotlight, you can click the **View Contacts** button to see a complete list of all of the contacts associated with the account. The button also tells you the number of contacts associated with the account. When you click on the button, the system displays the list of contacts in the Oracle Digital Sales system.

See the Accounts and Contacts chapter in the [Using Digital Sales \(Next Gen Sales\) Guide](#) for additional information about working with account and contact records.

To view the account contacts in Oracle Digital Sales:

1. [Access Account 360 for your account.](#)
2. In the Spotlight area of the screen, click the **View Contacts** button.

3. The system opens a new tab and displays the account contacts in the Oracle Digital Sales system.
4. View and update the contact information as needed, and then save your changes.
5. Close the new tab and return to the tab where your Account 360 record is displayed to continue working.

Using the Account Hierarchy

When you are dealing with large commercial or industrial accounts, there are typically multiple accounts that are related. You can use the **View Hierarchy** button to view parent and child accounts associated with the account you are viewing in Account 360.

When you access the hierarchy, the account you are currently on is in the middle of the screen in a large card. This is the focus card. Above the focus card you will see the direct parent of the account, and below the focus card, all children of the account are displayed. You can click on any card to change the focus card, and see other parent and child relationships in the hierarchy in more detail.

The account title on the focus card is a hyperlink. When you click this link, the system brings you to Account 360 for the account on the focus card. You can also perform the following actions using the action menu at the top right of a focus card:

- View account details
- View account team
- Create a note, appointment or task
- Send an email

You can use these tabs at the bottom of the focus card to change your view:

- **Children:** This tab is selected by default. It shows the number of child accounts, and displays cards for each child Oracle Fusion account.
- **Billing Accounts:** This tab displays the number of billing accounts associated with the focus card, and displays cards for each of those billing accounts.

Note that the number of billing accounts displayed in the hierarchy may differ from the number of billing accounts displayed in the main Account 360 page. This is because billing accounts that do not have the **Main Customer** option selected in the billing account to person relationship record in your Oracle Utilities customer information system are excluded from the hierarchy view to

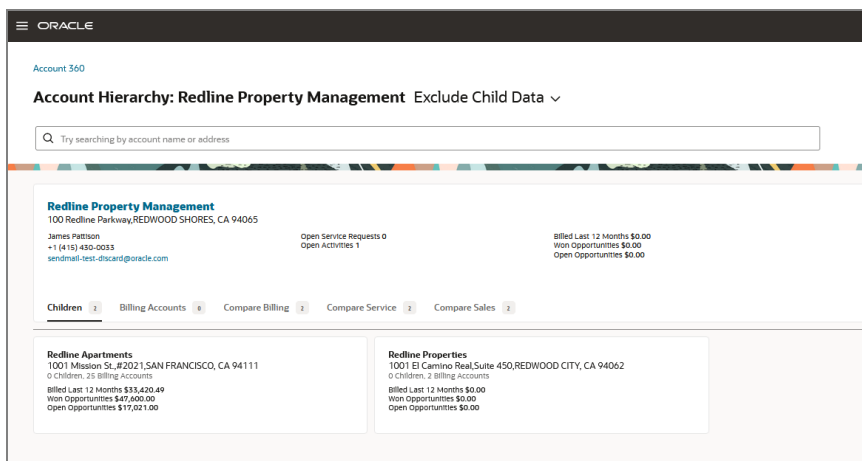
avoid duplication of values when rolling up child data. The main Account 360 page shows all related billing accounts, even if they are not related as the main customer. For additional information, see "Control Central - Account Information" in the *Business User Guide* for your Oracle Utilities customer information system, available in the [Oracle Energy and Water library](#).

- **Compare Billing:** Use this tab to view a graphical comparison of the billing data associated with the child accounts.
- **Compare Service:** Use this tab to view a graphical comparison of the number of service requests associated with the child accounts.
- **Compare Sales:** Use this tab to view a graphic comparison of the number of open leads and opportunities associated with the child accounts, and the open amounts for each of them.

When the **Children** tab is selected, each card contains the following overview information:

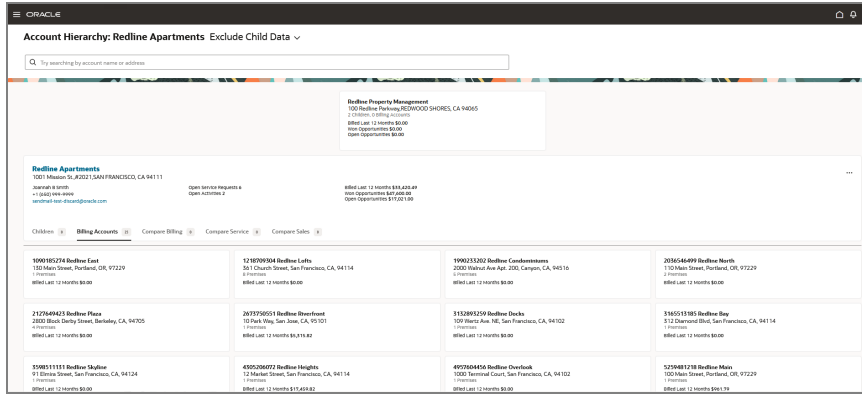
- Open Service Requests (included only on the focus card)
- Open Activities (included only on the focus card)
- Billed Last 12 Months
- Won Opportunities
- Open Opportunities

This image shows an example of the hierarchy view when the Children tab is selected:



When the **Billing Account** tab is selected, only Number of Premises and Billed Last 12 Months are displayed on the child cards, as opportunities are associated with Oracle Fusion accounts, and not billing accounts.

This image shows an example of the hierarchy view when the Billing Accounts tab is selected:



For examples and information about the Compare tabs, see [Comparing Data in the Hierarchy](#).

You can use the option at the top of the screen, next to the account name, to include or exclude child data from the overview information. If you include child data, the overview information on the cards includes data from that account and all of the children below that account. If you exclude child data, the overview data on the card is related to that account only.

When you are done viewing the hierarchy, you can use the link at the top left of the page to return to Account 360. Note that if you changed the focus card, and then use the link to return to Account 360, you will return to the account you were originally viewing when you accessed the hierarchy.

Viewing and Navigating the Account Hierarchy

You can use the **View Hierarchy** button in Account 360 to access the account hierarchy for a selected account. You can click on different cards within the hierarchy to change the focus, and view information about child accounts or about associated billing accounts. Within the hierarchy, you can use the action menu on the focus card to perform additional actions.

To view the account hierarchy:

1. [Access Account 360 for your account](#).
2. In the Spotlight area of the screen, click the **View Hierarchy** button.

3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Select the appropriate option at the top of the screen to include or exclude child data from your cards.
5. Click on different cards to change the focus card and view additional relationships in the hierarchy.
6. Select the **Billing Accounts** tab in the focus card to view all billing accounts that are associated with the focus card account.
7. To return to Account 360 for the account you were originally viewing, use the **Back** arrow at the top left of the page.
8. To see Account 360 for a different account, make the account you want to view the focus card, and then click the hyperlinked account title on the card.

To use action menu items in the account hierarchy:

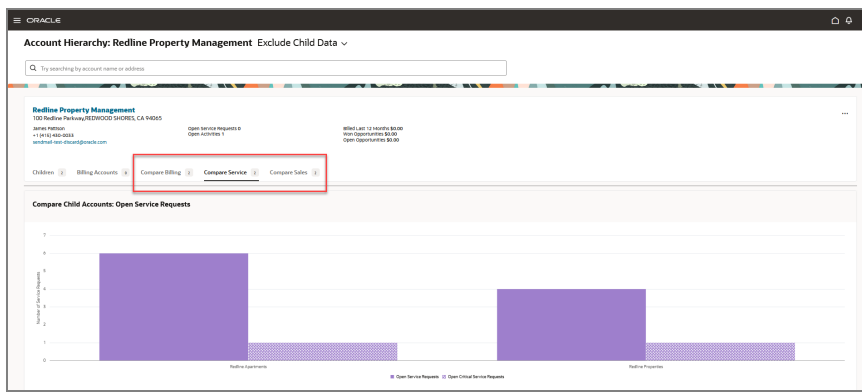
1. [Access Account 360 for your account.](#)
2. In the Spotlight area of the screen, click the **View Hierarchy** button.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Click the action menu on the right side of the focus card and select one of these options:
 - View Account Details
 - View Team
 - Create Note
 - Create Appointment
 - Create Task
 - Send Email
5. A new tab opens with the relevant information in the Oracle Digital Sales. See the [Using Digital Sales Guide](#) for additional information.
6. View and update the information as needed and save your changes.
7. Close the tab and return to the account hierarchy to continue working.

Comparing Data in the Hierarchy

You can use the account hierarchy to compare billing, service, and sales information across the accounts in the hierarchy. Compare tabs are available on each card that has child accounts or multiple billing accounts associated with it. When you click on a Compare tab, the system displays charts that provide a visual comparison of either billing, service, or sales data for the associated accounts.

When you hover over a bar in the charts, the system displays additional information about the bar, and provides links you can click to view additional details.

This image shows an example of the **Compare Service** chart, and identifies where the comparison tabs are on the focus card:



The **Compare Billing** chart displays bars that represent the amount billed during the last 12 months. The bars are split into different sections, based on the service type that was billed. When you click on a bar, the system brings you to the account associated with the bar, and when you hover over a section of the bar, the tool tip displays:

- The date range associated with the billed amount
- The service type and amount billed
- The name of the account associated with that bar
- The number of billing accounts included in the amount

The **Compare Service** chart displays bars that represent the number of service requests and the number of critical service requests that are associated with each account. When you click on a bar, the system brings you to the account associated with the bar, and when you hover over a bar, the tool tip displays:

- The number of open service requests
- The name of the account associated with that bar
- The number of billing accounts

The **Compare Sales** chart displays data that represent the number of sales leads and opportunities, as well as the amounts associated with them. When you click on a bar or data point, the system brings you to the account associated with the bar, and when you hover over a bar, the tool tip displays:

- The open revenue associated with that bar, which is measured on the left side of the chart
- The name of the account associated with that bar
- The number of billing accounts

The chart also includes data points that display the number of open leads and opportunities, which are measured along the right side of the chart. When you hover over a data point, the system displays:

- The number of open leads or opportunities
- The name of the account associated with that bar
- The number of billing accounts

To compare data in the hierarchy:

1. [Access Account 360 for your account.](#)
2. In the Spotlight area of the screen, click the **View Hierarchy** button.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Select the appropriate option at the top of the screen to include or exclude child data from your cards.
5. Click on different cards to change the focus card and view additional relationships in the hierarchy.
6. Click the one of these tabs to view a comparison for all cards below the focus card:
 - Compare Billing
 - Compare Service
 - Compare Sales
7. Hover over the chart components, such as bars or data points, to view additional information for each component.
8. Click on a bar, bar section, or data point to access details at the specific account level.

Using Action Menu Options from the Account 360 Spotlight

The information that is displayed in Account 360 comes from your Oracle Utilities customer information system and from the Oracle Digital Sales system. In some cases, you might need to view, update, or add additional details associated with the account. Many of these tasks are completed in the Oracle Digital Sales system. You can use the Action menu from the Spotlight area of the Account 360 screen to complete these tasks:

- View account details
- View the account team
- Add the account to, or remove it from, your favorites
- Create a note, appointment or task associated with the account
- Send an email

All of the items in the action menu, with the exception of the add to/remove from favorites, direct you to the Oracle Digital Sales system. When you select one of these options, the system opens a new tab. You can complete your task in the new tab, save your work, and close the tab to return to Account 360.

Adding or removing an account from the favorites list does not open a new tab. The account is simply added to or removed from the logged-in user's favorite accounts.

See the Accounts and Contacts chapter in the [Using Digital Sales Guide](#) for additional information about working with account records.

Managing Fusion Account Details

You can use the action menu from the Account 360 Spotlight to manage account details in the Oracle Digital Sales system.

To manage account details:

1. [Access Account 360 for your account.](#)
2. In the Spotlight area of the screen, click the action menu and then select one of these options:
 - View Account Details
 - View Team
 - Add to Favorites/Remove from Favorites
 - Create Note

- Create Appointment
 - Create Task
 - Send Email
3. The system opens a new tab and displays the necessary screen in the Oracle Digital Sales system.
 4. Create, view, or update the account information as needed, and then save your changes.
 5. Close the tab and return to the Account 360 tab to continue working.

Marking an Account as a Favorite from Account 360

Many key account managers have accounts that they work with often. To easily access these important accounts, you can mark an account as a favorite so you can easily find the account using the **Favorites** filter on the Business List.

When you access Account 360, you use the action menu, which is just above the account name, to specify that the account is a favorite.

You can also mark an account as a favorite using the action menu on the Business List. For more information, see [Using Action Menu Options on the Business List](#).

To Mark an Account as a Favorite:

1. [Access Account 360 for your key account](#).
2. Click the action menu above the account name.
3. Click **Add to Favorites**.
4. After adding an account to your favorites, you can then use the **Favorites** view to easily find your account. For more information, see [Search for Key Accounts](#).
5. After marking the account as a favorite, the option in the action menu changes to **Remove from Favorites**. Click this option to remove the account from your favorites.

Searching for Billing Accounts

When you access Account 360, you can use the search area in the Spotlight section of the screen to locate the billing accounts that are related to your key account. This section of the screen differs, depending on the number of billing accounts associated with the selected key account, as follows:

- If there are 10 or fewer billing accounts, the screen contains a list of the billing accounts. You can click on a billing account to view the details in Account 360.
- If there are more than 10 billing accounts, the screen displays **Search <X> Billing Accounts**. You can click on this text to open a window to search over the associated billing accounts. You can search for active, inactive, or all billing accounts, and then select an account to view the details in Account 360.

To Search for and Select Billing Accounts:

1. [Access Account 360 for your key account.](#)
2. In the page navigator area of the screen, complete one of these actions:
 - Click on a billing account record from the list. The billing account details are displayed in the work area of the screen.
 - Click **Search for <X> Billing Accounts**. The Search Billing Accounts window appears.
3. In the Search Billing Account window, enter your search criteria in the **Search** field. You can search by:
 - Billing Account Number
 - Billing Account Name
 - Premise Address
4. Use the drop down menu to specify whether you are searching for active, inactive, or all billing accounts, and then hit **Enter**.
5. When you have found the billing account you want to view or update, click on the record.
6. The system displays data associated with the selected billing account.
7. To return to the Account 360 view for the key account, click on **Account 360** in the page navigator area.

Exporting Data from Account 360

Many key account managers need to create reports to analyze data, or provide printed information to their managers or customers. To facilitate these tasks, key account managers can export chart and list data from multiple places within Account 360.

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:

- PDF
- Excel
- CSV

After you select an option, the system displays the **Export started** message. The export must complete before you can continue working in Account 360.

Be aware of the following:

- When you export chart data to a PDF, the system exports the *image* that is displayed on the screen. If you export a chart to CSV or Excel, the *data* associated with the displayed chart is exported.
- 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.

Viewing Premise and Service Details

After you select a billing account in Account 360, you can then view premise and service details for that billing account in an expandable tree structure. The typical tree structure includes the following levels:

- Premise
 - Service Contract
 - Service Point
 - Device
 - Component

This image shows an example of premise and service details:

Account 360 > 4927654081 >

4927654081 Premise and Service Details

- ▶  Premise - House No7 Apartment # 11, San Francisco, CA, 94102
- ▶  Premise - House No11 Apartment # 11, San Francisco, CA, 94102
- ▶  Premise - House No10 Apartment # 11, San Francisco, CA, 94102
- ▶  Premise - House No12 Apartment # 11, San Francisco, CA, 94102
- ▶  Premise - House No9 Apartment # 11, San Francisco, CA, 94102
- ▶  Premise - 5 of 6 premises [View all in CIS](#) 
- ▼  Inactive Premises
 - ▼  Premise - House No1 Apartment # 11, San Francisco, CA, 94102
 - ✕ Service contract - Electric Residential - TOU Rate, ER-TOUMI, 03-01-2023, 03-20-2023, Inactive
 - ▶  Premise - House No4 Apartment # 11, San Francisco, CA, 94102
 - ▶  Premise - House No2 Apartment # 11, San Francisco, CA, 94102
 - ▶  Premise - House No5 Apartment # 11, San Francisco, CA, 94102
 - ▶  Premise - House No1 Apartment # 11, San Francisco, CA, 94102
 - ▶  Premise - 5 of 7 premises [View closed contracts in CIS](#) 

By default, the tree includes the first five premise addresses associated with the selected billing account. If there are more than five, you can click the **View All in CIS** link at the bottom of the list of active premises to view all premise and service details in your customer information system.

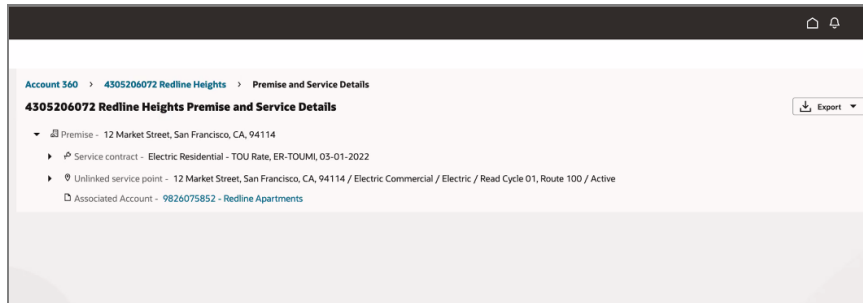
The tree also includes inactive premises, which are defined as premises without any active service contracts. The Inactive Premises node appears after the active premise nodes. You can expand this node to view the first five inactive premises associated with the selected billing account. Be aware that when viewing inactive premises in the tree, you can only drill down to the service contract level, where you can view the details of the prior service contracts. Also, if there are more than five inactive premises, you can click the **View closed contracts in CIS** link, which directs you to a search in your customer information system, where you can search for all inactive premises and service contracts.

For additional information about viewing premise and service details in your Oracle Utilities customer information system, see "Control Central" in the *Business User Guide* for your system, which is available in the [Oracle Energy and Water library](#).

At the bottom of the tree structure, any associated accounts are also listed. An associated account might appear in the Premise and Service Details if a premise has multiple

services, and one of them is under one account, and the other is under a different account. For example, if a tenant pays for the electricity, and the landlord pays for the water. These accounts might display as associated accounts. You can click on the associated account to view that account in Account 360.

This image shows an example of premise and service details that include an associated account:



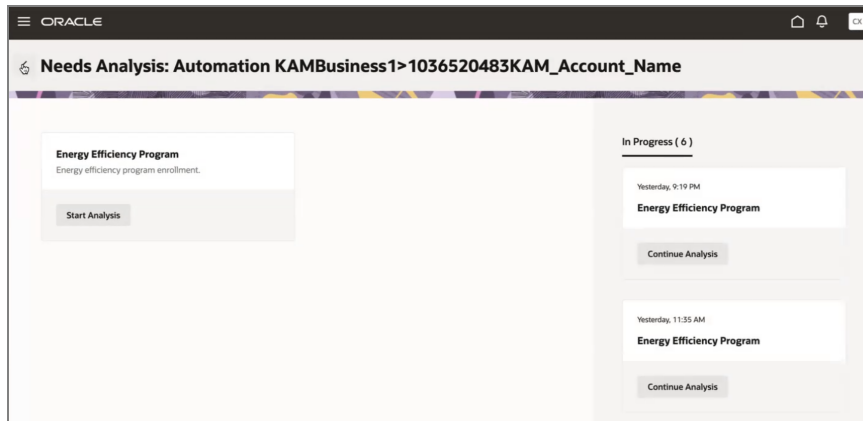
To view premise and service details:

1. [Access Account 360 for your key account.](#)
2. Using the navigation area of the screen, [search for and select a billing account.](#) You must select a billing account to continue.
3. At the top right of the screen, click the action menu, and then select **View Premise and Service Details.**
4. The system displays premise and service details in an expandable list, starting with the highest level, which is typically the premise address.
5. Expand and collapse the nodes of the tree as needed to view the details of each item.
6. If there are more than five premises, you can click the **View All in CIS** link at the bottom of the tree to see a complete list in your customer information system. Similarly, if there are more than five inactive premises, use the **View Closed Contracts in CIS** link to view the details of the billing account's closed service contracts. The system opens a new tab where you can continue your work in your customer information system. When you are done, close the tab and return to CX for Utilities Sales.
7. To view the Account 360 for an associated account, click on the hyperlink in the Associated Account node. This action brings you to Account 360 for the associated account. Click the Back button to return to the original account.
8. To return to Account 360 for the key account, click on **Account 360** in the breadcrumbs at the top of the page or in the page navigator area.

Using the Needs Analysis Dashboard

To better understand the needs of your accounts, you can perform a needs analysis, which identifies possible sales opportunities with your utility customers. Needs analysis interviews, and the rules and questions associated with them, are defined using the Oracle Intelligent Advisor system. You use the Needs Analysis Dashboard to launch new interviews, or to access interviews that are in progress.

This image shows an example of the Needs Analysis Dashboard:



The Energy Efficiency Programs interview is delivered with CX for Utilities Sales. This interview includes questions that you can ask your contacts to help you gather information about their account. After answering the questions, the system displays a list of recommendations. You can discuss these options with your contact to determine which plan is the best fit, and then select one of these options:

- Ready to move forward? (Create Opportunity)
- Need more time to decide? (Create Lead)
- Other follow up options

If you specify that the customer is ready to move forward when you save and submit the interview, the system automatically creates an opportunity that includes the products listed in the selected plan option. If you specify that the customer needs more time to decide, the system creates a lead that includes the selected plan details. And if you select the other follow up options when you save and submit the interview, the system gives you the choice of creating an appointment or a task that you can use to follow up with the customer at a later date.

You can also create leads, opportunities, notes, appointments, and tasks, or send an email, directly from the interview before completing the interview. You can then view or edit these records as needed. These options might be needed in the following scenarios:

- Your contact asks you to call back at another time to complete the interview. In this case, you can create an appointment or a task to remind you to call them back.
- Your contact tells you about another company that has similar needs to theirs. In this case, you can create a lead to follow up with the other company.

For additional information about creating or editing these records, see:

- [Managing Activities](#) for information about notes, appointments, and tasks.
- [Using the Leads and Opportunities tab](#) for information about leads and opportunities.

Be aware that once you launch an interview from the dashboard, the system immediately creates a record for that interview. If you do not complete the interview, you can exit the interview and then it will then be available in the In Progress section of the dashboard, where you can complete it at a later date. These in-progress interviews show the name of the original interview and are listed in order of the date they were last updated.

For additional information about items related to this topic, see:

- [Oracle Intelligent Advisor Implementation Tasks](#) for details about how your implementation might vary.
- [Managing Activities](#) for information about notes, appointments, and tasks.
- [Using the Leads and Opportunities tab](#) for information about leads and opportunities.

Performing a Needs Analysis Interview

The following task is based on the Energy Efficiency Programs interview that was delivered with CX for Utilities Sales. If your utility updated the interview, these steps might not reflect what you see on your screen.

1. [Access Customer 360](#).
2. [Search for and select a billing account](#) on which you want to perform a needs analysis.
3. Click the action menu button (3 dots) at the top right, and select **View Needs Analysis Dashboard**.
4. On the Needs Analysis: <Account Name> screen, click the **Start Analysis** button on the **Energy Efficiency Program** card.
5. The system creates a record for your interview and opens the **Energy Efficiency Program** screen.

Be aware that if you exit the interview before you complete it, the interview will appear in the **In Progress** area of the Needs Analysis Dashboard screen. You can click the **Continue Analysis** button on the interview card at any time to continue with these steps.

6. The following fields are automatically populated based on your billing account details, but you can select different values for each using the drop down options:
 - Account
 - Contact
 - Billing Account
7. If needed, use the action menu to create additional items, such as leads, opportunities, appointments, tasks, notes, and emails. These are created in addition to any records that are created when you complete the interview process. For example, your contact might ask you to call him back tomorrow because he is not available to complete the interview right now. In this case, you could create an appointment or a task to remind you to contact the person again tomorrow.
 - Lead
 - Opportunity
 - Note
 - Appointment
 - Task
 - Email

Selecting one of these options opens a new tab in your browser where you can create your record. When you are done, return to this tab to complete your interview or exit out of the Needs Analysis Dashboard.

8. Complete the questions in the **Energy Efficiency Program Enrollment** section.
9. Click **Next**.
10. The system displays the recommended plans for you to discuss with your customer. Each plan option includes:

- Plan name and description
- List of products included in the plan
- **More details** option that enables you to view additional details about each plan

11. If applicable, select a plan and then select one of these options:

- **Ready to move forward? (Create Opportunity):** If you select this option, you must select a plan before you can complete the interview. When you complete the interview, the system automatically creates an opportunity that includes the products included in the plan. The name of the opportunity is **Needs Analysis - Energy Efficiency Program <Date/Time>**.
- **Need more time to decide? (Create Lead):** If you select this option, you must select a plan before you can complete the interview. When you complete the interview, the system automatically creates a lead that includes the products included in the plan. The name of the lead is **Needs Analysis - Energy Efficiency Program**.
- **Other follow up options:** If you select this option, you do not need to select a plan. However, you must select one of these sub-options:
 - **Create Appointment:** If you select this option, the system creates an appointment with the plan options in the Description field. The name of the appointment is **Needs Analysis - Energy Efficiency Program - <Billing Account ID and Name>**.
 - **Create Task:** If you select this option, the system creates a task with the plan options in the Description field. The name of the task is **Needs Analysis - Energy Efficiency Program - <Billing Account ID and Name>**.

12. Click the **Accept & Submit** button.

13. The system returns you to the Needs Analysis Dashboard, and a message appears at the bottom indicating what type of record was created. For example, the "**Lead Created**" message might appear.

14. You can then view or edit any of the records you created as needed. For additional information, see:

- [Managing Activities](#) to view or edit appointments and tasks
- [Using the Leads and Opportunities tab](#) to view or edit leads and opportunities

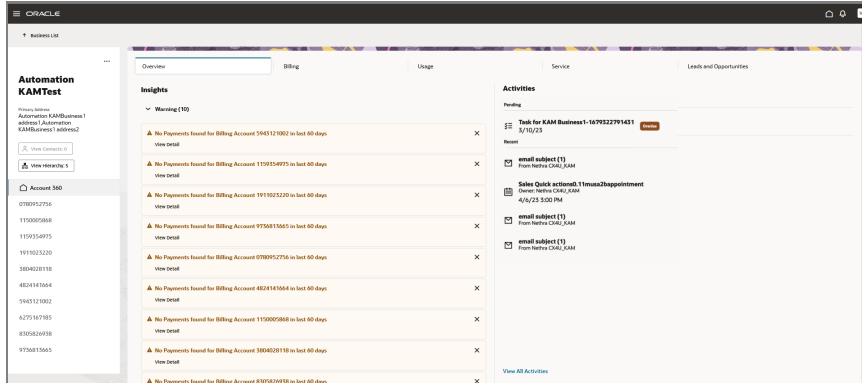
Using the Overview Tab

When you select a key account in the Business List, the system displays the Overview tab by default. You can use the Overview tab to view:

- A list of account insights, which include messages and warnings that you might need to follow up on.
- A list of pending and recent tasks that are associated with the Fusion account.

These activities are displayed only when you are at the Account 360 level, and not when you are viewing an individual billing account.

The Overview tab gives you an at-a-glance view of the insights and activities that are important to you. This image shows an example of the Overview tab:



Managing Insights

The Insights section of the Overview tab provides you with lists of insights associated with the account or billing account you are viewing in Account 360. Current insight types include:

- **Billing insights:** These insights identify accounts that have overdue accounts. The insights are triggered in your customer information system when an account has a past-due balance or is in a collections or severance process.
- **Contract renewal insights:** These insights notify users that there are service contracts that are expiring soon. These insights are triggered by the existence of opportunity records with the opportunity type of *RENEW* for the account. The close date of the opportunity determines the severity of the insight, as follows:
 - **Critical:** The close date has passed.
 - **Warning:** The close date is within 30 days of the current date, and includes the current date.
 - **Information:** The close date is more than 30 days from the current date.

Insights are informational and can point out areas where your key account might need attention. These insights are grouped by severity, and you can collapse and expand each severity category to view or hide the related insights.

Insights are displayed individually as detail insights, or grouped into a summary insights if there are several insights of the same type and severity. The rules regarding insight summarization vary by insight type, as follows:

- **Billing insights:** Summarization is configurable in your customer information system.

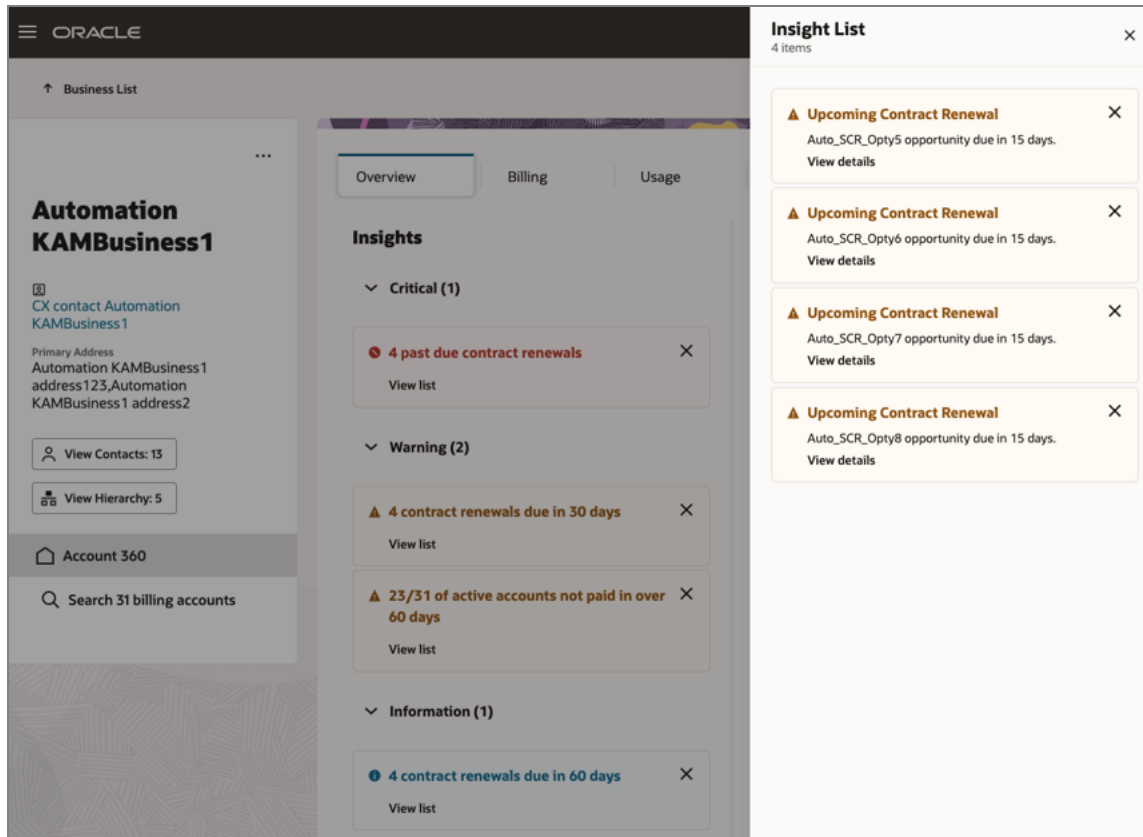
The display of summary insights is controlled by algorithms and insight settings in your customer information system (CIS). You can configure these algorithms and insights to use a summarization threshold. This threshold determines how many detail insights of the same type and severity are required to send a summary insight. Your CIS then sends either summary or detail insights to Account 360 based on these settings.

- **Contract renewal insights:** These insights are automatically summarized if there are more than three detail insights.

You can complete these tasks to view information about an insight:

- Click the **View Details** link on an individual insight to view additional details about the insight. Depending on the type of insight, the system directs you to the appropriate location in Account 360 to view additional details.
- Click the **View List** link on a summary insight to view the Insight List drawer. The list provides you with all of the individual insights that have been included in the summary insight. You can then click the View Details link on an individual insight to view additional details about the insight. Depending on the type of insight, the system directs you to the appropriate location in Account 360 to view additional details.
- Click the **X** on an insight, either on the tab or on the Insight List, to remove it from the current display. Note that removing an insight from your current display does not permanently remove the insight. If the insight is still valid the next time you load the page, it will be displayed in the list.

This image shows an example of the Overview tab with the Insight List drawer displayed:



For additional information about the topics associated with insights, see:

- [Using Digital Sales Guide](#) for additional information about working with lead and opportunity records.
- "Insight Types" in the *Framework Administrative User Guide* associated with your customer information system. Documentation for these systems is available in the [Oracle Energy and Water documentation library](#).

To view account insights:

1. [Access Account 360 for your account](#).
2. Click the **Overview** tab.
3. Collapse and expand the severity categories as needed to view all of the insights for your account.
4. On a summary insight, click the **View List** link to open the **Insight List** on the right side of the screen. Click the **X** at the top right of the drawer to close the **Insight List**.
5. On a detail insight, whether in the **Overview** tab or in the **Insight List**, click the **View Details** link to navigate to additional detailed information. The navigation depends on

the type of insight, as follows:

- For billing insights, the **Billing** tab of the associated billing account is displayed. See [Using the Billing Tab](#) for additional information.
- For contract renewal insights, the **Leads and Opportunities** tab of the associated billing account is displayed. See [Using the Leads and Opportunities Tab](#) for additional information.

Select the **Overview** tab for the appropriate account to return to your list of insights.

6. To remove an insight from the list, whether in the **Overview** tab or in the **Insight List**, Click the **X** on the right side of the insight. Note that this does not permanently delete the insight. It will display in the list the next time you load the page if it is still valid.

Managing Activities

The activities that are displayed in the Overview tab are a subset of the activity stream associated with your Fusion account in the Oracle Digital Sales system. The Activity tab displays the following:

- **Pending:** This section displays one record, which is the latest activity that is overdue or due in the future.
- **Recent:** This section shows the last 5 activities completed for the account.

To view all activities associated with the account, click the **View All Activities** link at the bottom of the screen. The system opens a new tab in Oracle Digital Sales where you can view and manage the activities. When you have finished working with the activity records, you can save your changes and close the new tab. When you return to the Overview tab, refresh your screen to see any changes.

The Activities section is available only when you are in the Account 360 view. If you select a specific billing account, the section is removed.

See the [Using Digital Sales Guide](#) for additional information about working with account and activity records.

To view account activities:

1. [Access Account 360 for your account.](#)
2. Click the **Overview** tab.
3. View the records in the **Activities** section.

4. To view additional activities and manage activities, click the **View All Activities** link.
5. The system opens a new tab with the Oracle Digital Sales activity information.
6. Review and update your activities as needed, and then save your changes and close the tab.
7. To see your changes on the **Overview** tab, refresh your screen.

Using the Billing Tab

You access the Billing tab by selecting an account from the Business list, and then selecting the Billing tab. On initial entry, the Billing tab displays the **Billing Account Comparison** section. If your key account has fewer than 20 associated billing accounts, the chart is automatically displayed. If there are more than 20 billing accounts, you must select 20 or fewer accounts to render the chart.

This image shows an example of the **Billing Account Comparison** section with a key account that has more than 20 associated billing accounts:

Billing Account Number	Billing Account Name	Previous Addresses	Billed Last 12 Months	Balance	Active Service Types
<input type="checkbox"/> 1000189276	Redline East	180 Main Street, Portland, OR, 97229		\$0.00	⚡
<input type="checkbox"/> 1218709304	Redline Loft	361 Church Street, San Francisco, CA, 94114		\$0.00	⚡ P-D-H
<input type="checkbox"/> 1990228202	Redline Condominium	2000 Market Ave Apt. 200, Canyon, CA, 94518		\$0.00	⚡ P-D-H
<input type="checkbox"/> 2056564499	Redline North	110 Main Street, Portland, OR, 97229		\$0.00	⚡
<input type="checkbox"/> 2127649423	Redline Plaza	2800 Bush Derby Street, Berkeley, CA, 94705		\$0.00	⚡
<input type="checkbox"/> 2673705551	Redline Rosefont	10 Park Way, San Jose, CA, 95101	\$5,515.82	\$10,641.00	⚡
<input type="checkbox"/> 3133892259	Redline Docks	100 Water Ave. NE, San Francisco, CA, 94102		\$105.23	⚡
<input type="checkbox"/> 3165513185	Redline Bay	312 Diamond Blvd, San Francisco, CA, 94114		\$258.09	⚡
<input type="checkbox"/> 3588511351	Redline Skyline	91 Blinn Street, San Francisco, CA, 94134		\$1,154.02	⚡ P-D
<input type="checkbox"/> 4303280072	Redline Heights	12 Market Street, San Francisco, CA, 94114		\$17,659.82	⚡

Using Billing Comparison Charts

You can select billing accounts from the list of records, or you can search for specific billing accounts to build a comparison chart.

To Compare Billing Information in a Chart:

1. [Access Account 360 for your key account.](#)
2. In the work area of the screen, a list of associated billing accounts appears below the banner message or chart. The number of associated billing accounts is displayed next to the **Billing Accounts** field. If all billing accounts are not displayed, scroll down to continue loading records in the billing account list.

3. Using the check boxes at the beginning of each record, select the accounts you want to compare in the chart.

As you select billing accounts, the **Selected** field displays the number of accounts you have selected. You can select up to 20 billing accounts for comparison.

4. When you have selected the billing accounts you want to compare in the chart, click the **Update Chart** button.

You can also select billing accounts by clicking **Search Billing Accounts** at the top of the list. Use the **Select Billing Accounts** window to search for and select the billing accounts you want to compare in the chart, and then click the **Update Chart and Close** button.

Additionally, search queries in the Select Billing Accounts window typically require an exact match. The premise address search is limited to the **primary** premise associated with the billing account. You can use wildcards to query on Address Line 1 of the premise address. For example, searching using **%main** will return all billing accounts where "main" is in the Address Line 1 field of the primary premise associated with the account in your customer information system.

5. The chart is displayed, showing billing data for the current year for each selected billing account. You can:
 - Use the < and > buttons above the chart to view data for different years.

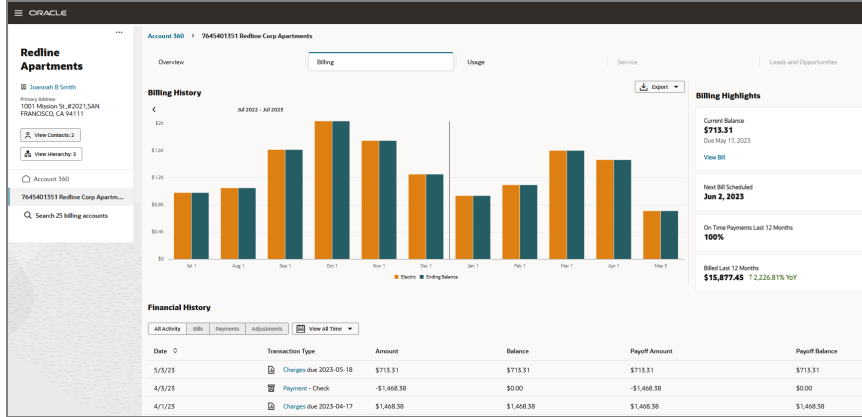
Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.
 - Hover over a bar to view dates, service types, and billing amount details.
 - Click on a bar to display detailed billing data for the billing account.
6. To export the chart data, click the **Export** button above the chart. See [Export Data from Account 360](#) for additional details.

Viewing the Bill History Chart and Bill Segment Details

To answer customer inquiries or determine how to best service a customer, you might need to view information about their utility bills. Once you have accessed a billing account, you can view the billing history chart to analyze billing history data and trends. If you select

a single active or inactive billing account from the Billing Account Comparison chart or the Spotlight search, the Billing Tab displays billing information that is specific to the selected billing account.

This image shows an example of the Billing tab after you select a single billing account.



Billing account information is displayed in the following sections:

- **Billing History:** This section of the Billing tab displays a chart that represents the billing history for the selected account. For each bill period, there are two bars. The first bar can include multiple sections, which represent the amounts associated with each service type included on the bill. The second bar represents the ending balance for that bill. You can use the arrows above the chart to scroll through different date ranges.
- **Billing Highlights:** This section of the Billing tab displays the following items for the selected billing account:

 - **Current Balance:** This card identifies the current balance on the billing account, specifies when the balance is due, and provides a link to view the bill details. If the account is no longer active, the card displays the date the service contract ended and a link to view the last bill.
 - **Next Bill Scheduled:** This card identifies the date of the next scheduled bill.
 - **On Time Payments Last 12 Months:** This card displays the percentage of payments that were made on time in the last 12 months for the selected billing account.
 - **Billed Last 12 Months:** This card displays the dollar amount that has been billed to the selected billing account over the last 12 months, and provides a year-over-year insight to compare the amount to the previous 12 months.
- **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.

To View the Billing History Chart:

1. [Access the billing account](#) you want to view.
2. In the **Billing History** section of the Billing tab, use the < and > buttons above the chart to view the desired date range.

Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

3. Hover over a bar to view dates, service types, and billing amount details.
4. Click on a bar to view billing details.
5. To export chart data, click the **Export** button. See [Export Data from Account 360](#) for additional details.

Viewing Financial History Details

To answer customer inquiries, or determine how to best service a customer, you might need to view information about the account's billing and payment history. To view financial history, you must select a billing account on the Billing tab. You can then view payment, bill, and adjustment history for the billing account.

By default, all financial history records are displayed in the **Financial History** list. You can use the filter fields above the list to narrow the results to the type of record or to a specific date range. To view details about a record, click on the hyperlink in the **Transaction Type** column.

To View Financial History Details:

1. [Access the billing account](#) you want to view.
2. Search for and locate a financial history record in the **Financial History** section. To locate a specific record, you can use the following filters:
 - All activity
 - Bills
 - Payments
 - Adjustments

- **Date Range:** By default, the financial history date range is set to "All time" and includes all financial history through the configured range. To specify a custom date range, click on the Calendar, click **Select Custom Date**, enter your date range and then click **Submit**.

The range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

3. The system updates to records in the list to reflect your filter selections.
4. Click on the hyperlink in the **Transaction Type** column.
5. The system displays one of the following drawers on the right side of the screen, depending on the transaction type of the selected record:
 - Payment drawer
 - Adjustment drawer
 - Bill drawer
6. To close the drawer, click the **X** at the top.
7. Continue on to one of these topics to understand the detailed information in the drawers:

Viewing Payment Details

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

To View Payment Details:

1. [Access the billing account](#) associated with the payment you want to view.
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 billing account](#) associated with the adjustment you want to view.
2. Click on an adjustment record in the **Financial History** section.
3. The system displays the **Adjustment** drawer on the right side of the screen, which includes:
 - The status and title of the adjustment
 - Adjustment ID
 - Adjustment Date
 - Bill ID
 - Amount
 - Status
 - Last Bill Issued
 - Adjustment Type
 - Premise
 - Service Agreement
 - Financial Details
4. To close the **Adjustment** drawer, click the **X** at the top.

Viewing Bill and Bill Segment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific utility bill. You can use the following

methods to access bill and bill segment details from the Billing tab:

- Click on a bar in the **Billing History** chart.
- Click **View Bill** in the **Current Balance** card of the **Billing Highlights** section.
- Click on a bill record in the **Financial History** section.

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

To View Bill and Bill Segment Details:

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

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

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

Using the Usage Tab

When you access Account 360, the Overview tab is selected by default. To view usage information, select the Usage tab. The comparison chart shows you the total usage by year and service type for each selected billing account.

The main work area of the tab can differ, as follows:

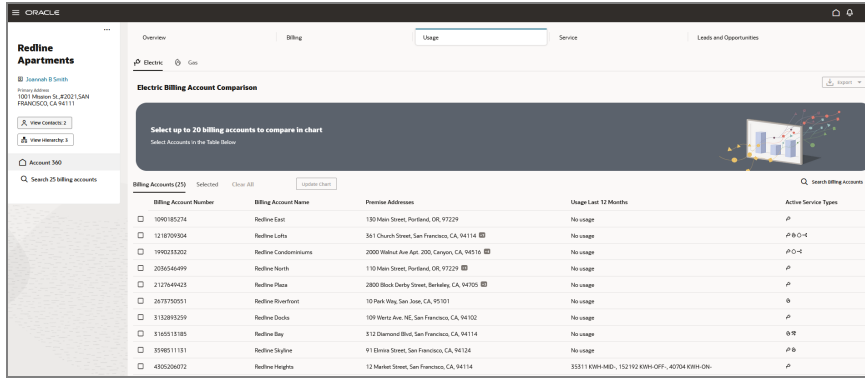
- **Billing Account Comparison Chart:** If you are at the Account 360 view, and your key account has 20 or fewer associated billing accounts, the system displays the **Billing Account Comparison** chart automatically.
- **Billing account selection area:** If you are at the Account 360 view, and your key account has more than 20 billing accounts, the system displays a message instructing you to select up to 20 accounts to view the chart. You can select one or more account and then click the **Update Chart** button to render the chart.
- **Service Contract Usage Map:** If you have navigated to a specific billing account, the Usage tab displays a map and lists the service contracts associated with the selected billing account.

When on the Account 360 view, the screen displays detailed records for each billing account that include information such as:

- Billing account name and number
- Premise Addresses - If there are multiple premises associated with a billing account, a badge appears next to the displayed address to note how many additional premises there are.
- Usage for the selected service type over the last 12 months
- Icons for each service type associated with the billing account

Icons with a slash through them represent a service type that is not currently active, but was active within the configured range for historical data display. The date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

This image shows an example of the Usage tab when on the Account 360 view for a key account with more than 20 billing accounts:



You can select billing accounts from the list of records, or you can search for specific billing accounts to compare. If you select a single billing account from the page navigator, the system displays the **Service Contract Usage Map**.

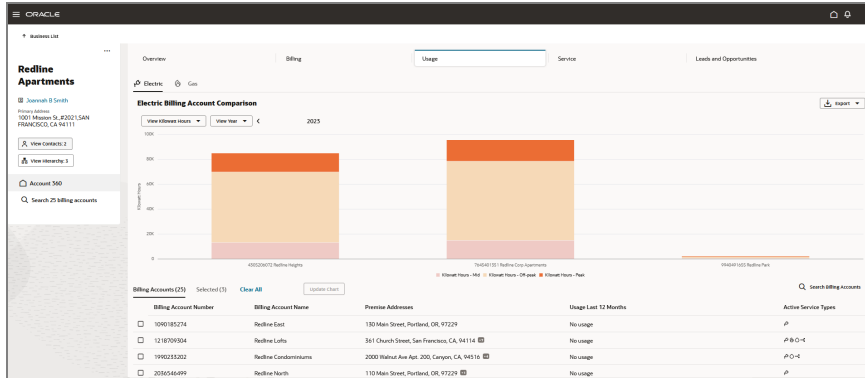
Using Usage Comparison Charts

If your account has fewer than 20 billing accounts, or you have selected the billing accounts you want to view and compare, the system renders your chart. Using tabs above the chart, you can specify which service type you want to view. You can also change the data that is displayed in the chart using these options that appear at the top of the chart:

- **Unit of Measure:** Use this filter to display chart data in a specific unit of measure. The filter displays all unit of measure options that are available for the selected service type and billing accounts.
- **Level of Detail:** Depending on the data that is available for the selected accounts, you can use a filter to display the chart by year or month.
- **Date Range:** You can use the arrows above the chart to change the date range displayed in the chart. Click the arrow to the left of the date to see older data, and click the arrow to the right of the date to see more current data. By default, the system displays the most current data when you first access the chart.

Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

This image shows an example of the Usage Comparison chart for an account:



To Compare Usage Information in a Chart:

1. [Access Account 360 for your key account](#) and then click the **Usage** tab.
2. In the work area of the screen, a list of associated billing accounts appears below the banner message or chart. The number of associated billing accounts is displayed next to the **Billing Accounts** field. If all billing accounts are not displayed, scroll down to continue loading records in the billing account list.
3. Using the check boxes at the beginning of each record, select the accounts you want to compare in the chart.

As you select billing accounts, the **Selected** field displays the number of accounts you have selected. You can select up to 20 billing accounts for comparison.

4. When you have selected all of the billing accounts you want to compare in the chart, click the **Update Chart** button.

You can also select billing accounts by clicking Search Billing Accounts at the top of the list. Use the Select Billing Accounts window to search for and select the billing accounts you want to compare in the chart, and then click the Update Chart and Close button.

Additionally, search queries in the Select Billing Accounts window typically require an exact match. The premise address search is limited to the **primary** premise associated with the billing account. You can use wildcards to query on Address Line 1 of the premise address. For example, searching with **%main** will return all billing accounts where “main” is in the Address Line 1 field of the primary premise associated with the account in your customer information system.

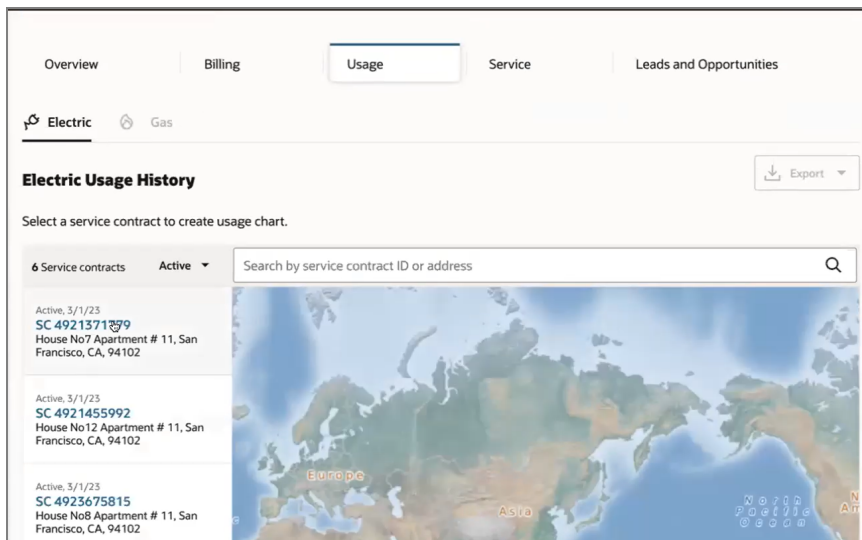
5. The chart is displayed, showing usage data for the current year for each selected billing account. You can:
 1. Use the < and > buttons above the chart to view data for different years.
 2. Hover over a bar to view additional usage details.
 3. Click on a bar to display detailed usage data for the billing account.
6. To export the chart data, click the **Export** button above the chart.

Using the Service Contract Usage Map

You can use the **Service Contract Usage Map** to view all active and inactive service contracts for a selected billing account on a map and access detailed usage history. To access the map, you first access Account 360 for your key account, then you search for and select an individual billing account. Then select the Usage tab to view the map.

By default, the map displays a list of active service contracts. You can use the drop down filter to display active or inactive contracts only, or to display all service contracts.

This image shows an example of the **Service Contract Usage Map**:



Each service contract associated with the account is plotted on the map using the latitude and longitude of the premise address, and a list of the service contracts is displayed to the left of the map. You can click within the map and narrow or move your focus to view service contracts in a specific area. You can also search for specific service contracts using the search bar and the filter options. When you enter search criteria, the map view narrows in on your search results.

To view usage history for a service contract, complete one of these actions:

- Click on a pin in the map
- Click on a service contract from the list

The system displays the **Usage History** chart for the selected service contract.

Viewing Usage History Data

Once you have navigated to the **Usage History** chart, you can change your view by:

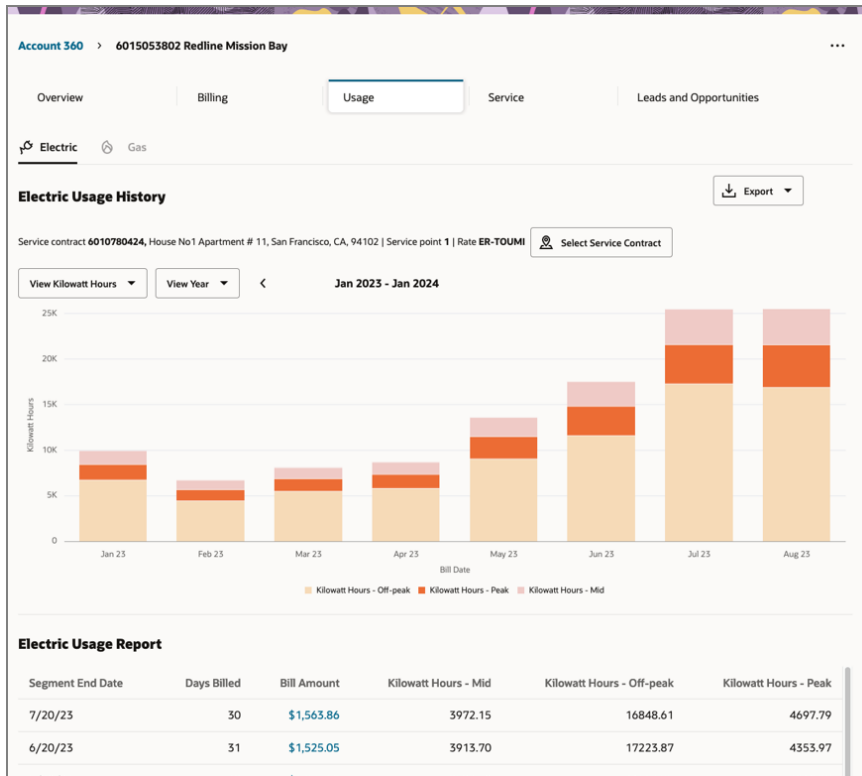
- Selecting a different unit of measure. For example, select Kilowatt Hours.
- Selecting a different usage interval. For example, select View Bill Period.
- Use the < and > buttons to change the time period you are viewing.

Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

- Click the **Select Service Contract** button to select and view a different service contract.

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

This image shows an example of the **Usage History** chart:



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

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

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

To View Usage Details for a Service Contract

1. [Access Account 360 for your key account.](#)
2. [Search for and select a billing account,](#) and then click the Usage tab.

3. The **Service Contract Usage Map** appears, and all associated service contracts are displayed as pins in the map, and in a list to the left of the map.

4. Click on a pin in the map, or on a service contract in the list.

If you click on a pin that includes multiple service contracts, you will then need to click on the service contract you want to view from the **Select a service contract** window.

5. The system displays the **Usage History** chart in the work area.

6. Use these options to change your display:

- Unit of Measure filter
- View filter
- Scroll left and right to display different date ranges

Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

7. Hover over a bar to view usage details.

8. Click on a bar to display a more detailed chart.

9. Scroll down to the **Usage Report** to view additional details about the service contract.

10. To view bill segment details, click on the **Billed Amount** column for a record in the report. See [Viewing Bill and Bill Segment Details](#) for additional information.

Using the Service Tab

You can use the Service tab to view a list of resolved and unresolved service requests associated with a key account, filter service requests by billing account, or create a new service request. This image shows an example of the Service tab:

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar includes the user name 'Courtney Rogers', a privacy address, and account information for 'Account 560'. The main content area has tabs for 'Overview', 'Billing', 'Usage', and 'Service'. The 'Service' tab is active, displaying a 'Service Request History' table. The table has a search bar and an 'Export' button. The table columns are: Severity, Reference Number, Title, Category, Status, Last Updated, and Assignee. The table contains several rows of service request data.

Severity	Reference Number	Title	Category	Status	Last Updated	Assignee
High	SR0000068131	sr sample title2	Issue	New	2/9/23 6:09 AM	CKU KAM
High	SR0000068149	sr sample title	Issue	New	1/17/23 5:17 PM	CKU
Medium	SR0000068133	Test 22	Dispute	New	2/9/23 5:34 PM	
Medium	SR0000068148	test service request	Billing	New	1/31/23 11:32 PM	Warne Shane
Medium	SR0000061145	test service request title new	Issue	New	1/24/23 3:55 PM	CKU KAM
Low	SR0000069124	Sales Quick action0.tkm1za.tb		New	2/14/23 7:58 AM	
Low	SR0000068136	Report Outage		New	2/10/23 6:22 PM	
Low	SR0000068135	High Bill enquiry		New	2/10/23 6:18 PM	

You can search for service request by reference number or title, and you can sort them by clicking the arrows in the following column headers:

- Severity
- Reference Number
- Title
- Category
- Status
- Last Updated
- Assignee

You can also filter the service request list by billing account. You can select a billing account in the billing account search, which is available in the Spotlight area, access the Service tab, and then complete the steps to [search for a billing account](#). After you complete your search, only the requests associated with your selected billing account are displayed in the list.

You can use the following options in the action menu at the top of the tab:

- **Create Service Request:** This option opens the Create Service Request drawer, where you can create and save a new service request.
- **View Work Queue:** This option brings you to the Work Queue, where you can perform all tasks that are allowed in the Work Queue, such as assigning a service request to yourself. See [Using the Work Queue](#) for additional information.

You can click on the hyperlink in the Reference Number column to access the service request in the Oracle Fusion Service system. The system opens the service request in a new tab, where you can view and edit information. When you are done updating the service request, you can use the **Return to Account 360** link at the top of the page to return to Account 360.

Create a Service Request from the Service Tab

You can use the action menu option at the top of the Service tab to create a new service request for your key account or associated billing account.

When you create a service request, the system opens the Create Service Request drawer directly in Account 360, which you use to quickly generate a service request by completing a minimal number of fields. The values and options that are available in this drawer are determined by your Oracle Fusion Service settings. For additional information, see the following topics in the Oracle Fusion Service Help Center:

- [How to Manage SmartText Entries](#)
- [Service Request Categories](#)

- [Work Assignment and Routing](#)

To Create a Service Request from the Service Tab:

1. [Access Account 360 for your account.](#)
2. Select the Service tab.
3. Click the action menu at the top right, and then select **Create Service Request**.
4. The system opens the Create Service Request drawer. If you are at the Account 360 view when creating the request, the Account field is automatically populated with the account name. If you are viewing a billing account, but the Account field and the Billing Account fields are automatically populated.
5. 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 Digital 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 Digital Sales Guide](#).
 - **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.
6. Click **Create** at the bottom of the drawer. A message appears at the top of the screen confirming the creation of the service request.
7. Click the **View Service Request** link in the confirmation message to view or edit the service request in Oracle Fusion Service. See Service Requests in the [Using Service Center in the Redwood User Experience Guide](#).

Edit Billing Accounts on a Service Request

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

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

1. Accessing the service request you want to edit on the Service tab of Account 360.
2. Click the **Edit Billing Accounts** link in the Action column.
3. The system opens a new tab with the **<Service Request Title>: Billing Accounts** form in Oracle Fusion Service.
4. Complete the steps listed in [Manage Billing Accounts, Premises, and Service Points](#).

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

Managing Billing Accounts, Premises, and Service Points

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

- Service requests
- Leads
- Opportunities

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

- Billing accounts
 - Premises
 - Service points

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

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

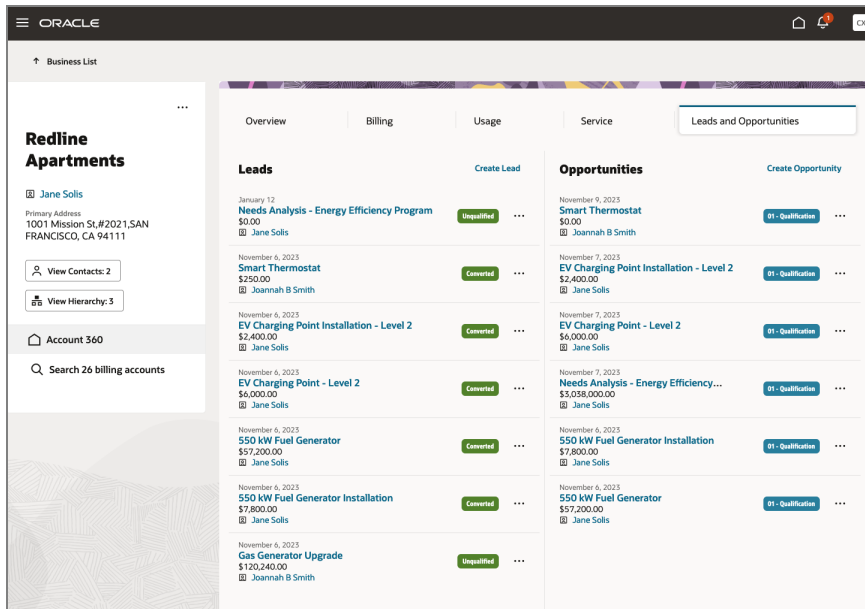
Add, Edit, or Remove Billing Accounts, Premises, or Service Points

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

Using the Leads and Opportunities Tab

You can use the Leads and Opportunities tab in Account 360 to get an at-a-glance view of the sales leads and opportunities associated with an account. This tab includes all of the leads and opportunities for the account or billing account you are viewing.

This image shows an example of the Leads and Opportunities tab:



Each lead or opportunity records displays the date on which it was created, the amount (if available), the primary contact, and the status. Statuses for a lead can include:

- Unqualified
- Qualified
- Converted
- Retired

Statuses for opportunity records come from the Oracle Digital Sales system, and reflect the sales stage of the record.

You can use the **Create Lead** and **Create Opportunity** links at the top of the tab to create a new lead or opportunity. When you click these links, the system opens a drawer on the right of the screen where you can quickly create and save the new record. When you return to Account 360, a confirmation message appears, and you can see the new record you created.

To view detailed information or manage the lead or opportunity, click on the hyper-linked heading of the lead or opportunity to view and manage it, or use an action menu option to perform additional tasks. For each lead listed on the tab, you can complete the following tasks:

- Click on the hyperlink name of the lead to view the Lead Overview in Oracle Digital Sales in a new tab.
- Hover over the primary contact to view contact details.

- Use the action menu to:
 - **Edit the lead:** This option opens the Edit Lead screen in Oracle Digital Sales in a new tab.
 - **Edit the billing accounts associated with the lead:** This option enables you to associate multiple billing accounts, premises, and service points with the lead.
 - **Qualify the lead:** The system displays a message at the bottom of the screen if the lead is successfully qualified, and changes the status to Qualified. This action cannot be undone, and is only available on unqualified leads.
 - **Convert the lead to an opportunity:** The system opens a drawer on the right side of the screen, where you can enter the name of the opportunity and update the owner and contact information. When you save the details and return to the Leads and Opportunities tab, the status of the lead is Converted and a new opportunity record for the account exists.
 - **Retire the lead:** The system opens the Oracle Digital Sales system, where you can enter the reason for retiring the lead, and save your changes. After saving, the lead appears with the status Retired.
 - **Attach a note, appointment, or task to the lead:** These options open a new tab in Oracle Digital Sales, with the appropriate screen displayed. You can create your activity, save your work, and return to the Leads and Opportunities tab.
 - **Send an email:** This option opens a new tab in Oracle Digital Sales where you can draft and send an email. After sending an email, return to the Leads and Opportunities tab.

For each opportunity listed on the tab, you can complete the following tasks:

- Click on the hyperlink name of the opportunity to view the Opportunity Overview in Oracle Digital Sales in a new tab.
- Hover over the primary contact to view contact details.
- Use the action menu to:
 - **Edit the opportunity:** This option opens the Edit Opportunity screen in Oracle Digital Sales in a new tab.
 - **Edit the billing accounts associated with the opportunity:** This option enables you to associate multiple billing accounts, premises, and service points with the opportunity.
 - **Attach a note, appointment, or task to the lead:** These options open a new tab in Oracle Digital Sales, with the appropriate screen displayed. You can create your

activity, save your work, and return to the Leads and Opportunities tab.

- **Send an email:** This option opens a new tab in Oracle Digital Sales where you can draft and send an email. After sending an email, return to the Leads and Opportunities tab.

See the [Using Digital Sales Guide](#) for additional information about working with lead and opportunity records.

Creating a New Lead or Opportunity

You can use links at the top of the Leads and Opportunities tab to create new lead and opportunity records for your account. After you create them, you edit and manage the leads and opportunities from within the Oracle Digital Sales system.

See the [Using Digital Sales Guide](#) for additional information about working with lead and opportunity records.

To Create a Lead:

1. [Access Account 360 for your account.](#) You can be at the Account 360 level or on a specific billing account.
2. Select the Leads and Opportunities tab.
3. Click the **Create Lead** link at the top of the screen.
4. The system opens the Create Sales Lead drawer on the right of the screen.
5. Complete the following fields:
 - **Primary Contact:** This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
 - **Lead Name**
 - **Job Title**
 - **Account Name:** This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
 - **Contact Phone**
6. Specify the contact preferences related to calling the customer by selecting one of these options:
 - **None (default)**
 - **Do not call**
 - **OK to call**

7. Enter the contact email address, and then specify the preferences related to emails by selecting one of these options:
 - None (default)
 - Do not email
 - OK to email
8. Enter the remaining information as needed:
 - Source: Select an option from the available choices.
 - Status: Select an option from the available choices. By default, the lead will be set to Unqualified.
 - Owner
 - Rank
 - Country
 - Address
9. Click **Save** to return to the Leads and Opportunities tab. The lead now appears in the list.
10. A message appears at the top of the screen confirming that the lead has been created.
11. Click the **View lead** link in the message to view and edit the lead in the Digital Sales system.

To Create an Opportunity:

1. [Access Account 360 for your account.](#) You can be at the Account 360 level or on a specific billing account.
2. Select the Leads and Opportunities tab.
3. Click the **Create Opportunity** link at the top of the screen.
4. The system opens the Create Opportunity drawer on the right of the screen.
5. Complete the following fields:
 - Business Unit ID: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
 - Name

- **Account:** This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
 - **Primary Contact:** This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
 - **Sales Method:** This field is automatically populated based on your Digital Sales settings, but you can select a different value from the drop down options.
 - **Sales Stage:** This field is automatically populated based on your Digital Sales settings, but you can select a different value from the drop down options.
 - **Win Probability**
 - **Close Date**
 - **Currency**
6. Click **Save** to return to the Leads and Opportunities tab. The opportunity now appears in the list.
 7. A message appears at the top of the screen confirming that the opportunity has been created.
 8. Click the **View opportunity** link in the message to view and edit the opportunity in the Digital Sales system.

Editing Leads and Opportunities

The Leads and Opportunities tab displays the five most recently updated leads and opportunities associated with your account. You can use options on this tab to:

- Qualify a lead
- Convert a lead to an opportunity
- Retire a lead
- View all of an account's leads or opportunities in Oracle Digital Sales
- Edit the lead or opportunity in Oracle Digital Sales
- Edit billing accounts, premises, and service points associated with a lead or opportunity

Most of the lead and opportunity management tasks occur in the Oracle Digital Sales system. These tasks explain how to access the leads and opportunities, the tasks you can complete in CX for Utilities Sales, and how to access the lead or opportunity in Oracle Digital Sales so you can manage them.

See the [Using Digital Sales Guide](#) for additional information about working with lead and opportunity records.

To Qualify a Lead:

1. [Access Account 360 for your account.](#)
2. Select the Leads and Opportunities tab. Note that you must be on the Account 360 view to select this tab.
3. Click the action menu next to the lead you want to qualify, and then click **Qualify**.
4. The system displays a message at the bottom of the screen if the lead is successfully qualified, and updates the lead status.

To Convert a Lead to an Opportunity:

1. [Access Account 360 for your account.](#)
2. Select the Leads and Opportunities tab. Note that you must be on the Account 360 view to select this tab.
3. Click the action menu next to the lead you want to convert, and then click **Convert to Opportunity**.
4. The system opens the **Convert to Opportunity** drawer on the right.
5. Make any changes to the opportunity name, if needed.
6. Verify that the correction options are selected in these fields:
 - Owner
 - Primary Contact
 - Account Name
7. Click **Save**.
8. The newly created opportunity is now displayed in the opportunity list, and the lead status has been updated to converted. Be aware that if there were billing accounts associated with the lead, they are also associated with the newly created opportunity.

To Retire a Lead:

1. [Access Account 360 for your account.](#)
2. Select the Leads and Opportunities tab. Note that you must be on the Account 360 view to select this tab.

3. Click the action menu next to the lead you want to retire, and then click **Retire**.
4. The system opens Oracle Digital Sales in a new tab.
5. Specify the reason for retiring the lead, enter any necessary comments, and then click **Submit**.
6. Close the tab and return to the Leads and Opportunities tab, where your lead status has been updated to Retired.

To View All Leads or Opportunities in Oracle Digital Sales:

1. [Access Account 360 for your account.](#)
2. Select the Leads and Opportunities tab. Note that you must be on the Account 360 view to select this tab.
3. Click the **View All Leads** or **View All Opportunities** link at the bottom of the screen.
4. The system opens Oracle Digital Sales in a new tab, and displays a list of all lead or opportunity records associated with the account.
5. View and manage your leads and opportunities as needed, save your changes, and close the tab.

To Edit a Lead or Opportunity in Oracle Digital Sales:

1. [Access Account 360 for your account.](#)
2. Select the Leads and Opportunities tab. Note that you must be on the Account 360 view to select this tab.
3. Complete one of these actions:
 - Click the hyper-linked name of the lead or opportunity to access the lead or opportunity overview in Oracle Digital Sales. The system opens a new tab.
 - Click the action menu next to the lead or opportunity you want to edit, and then click **Edit Lead** or **Edit Opportunity** to access the detail screen in Oracle Digital Sales in edit mode. The system opens a new tab.
4. Edit the lead or opportunity record as needed, save your changes, and close the tab.
5. Return to the Leads and Opportunities tab to continue your work.

To Edit Billing Accounts on a Lead or Opportunity

You can add billing accounts, premises, and service points to a lead or opportunity to ensure that the details of the request are associated with the correct entity.

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

1. Accessing the Leads and Opportunities tab of Account 360.
2. Click the action menu button (3 dots) next to the lead or opportunity you want to update and then select **Edit Billing Accounts**.
3. The system opens a new tab with the **<Lead or Opportunity Title>: Billing Accounts** form in Oracle Fusion Sales.
4. Complete the steps listed in [Manage Billing Accounts, Premises, and Service Points](#).

For additional information about viewing or editing leads and opportunities in Oracle Fusion Sales, see the [Using Sales Guide](#) in the Oracle Help Center.

Managing Billing Accounts, Premises, and Service Points

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

- Service requests
- Leads
- Opportunities

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

- Billing accounts
 - Premises
 - Service points

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

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

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

1. Access the **<Record Title>: Billing Accounts** form. Your navigation to this form is determined by the type of record you are adding billing accounts to. This could be a service request, lead, or opportunity.
2. Click the **Add Billing Accounts** button at the top right of the screen.

3. Search for and select the billing accounts you want to attach to the record, and click **Add**.
4. The system returns you to the main form with the billing accounts in the list.
5. To add a premise as a child record under a billing account, click the Action menu (...) to the right of the billing account, and then click **Add Premise**.
6. Search for and select the premises you want to add to the record, and then click **Add**.
7. The system returns you to the main form with the premises added as children of the selected billing account. You can expand or collapse the hierarchy as necessary.
8. To add a service point as a child record under a premise, click the Action menu (...) to the right of the premise, and then click **Add Service Point**.
9. Search for and select the service points you want to add to the record, and then click **Add**.
10. The system returns you to the main form with the service points added as children of the selected premise. You can expand or collapse the hierarchy as necessary.
11. To remove a record from the hierarchy, click the Action menu (...) to the right of the record you want to remove, and then click **Remove**. Note that if you are removing an item with children, your selected record and all associated child records will be removed.
12. On the confirmation message, click **Remove**.

