



C2M v2.9

3.4.1.1 Manage Customer Contacts

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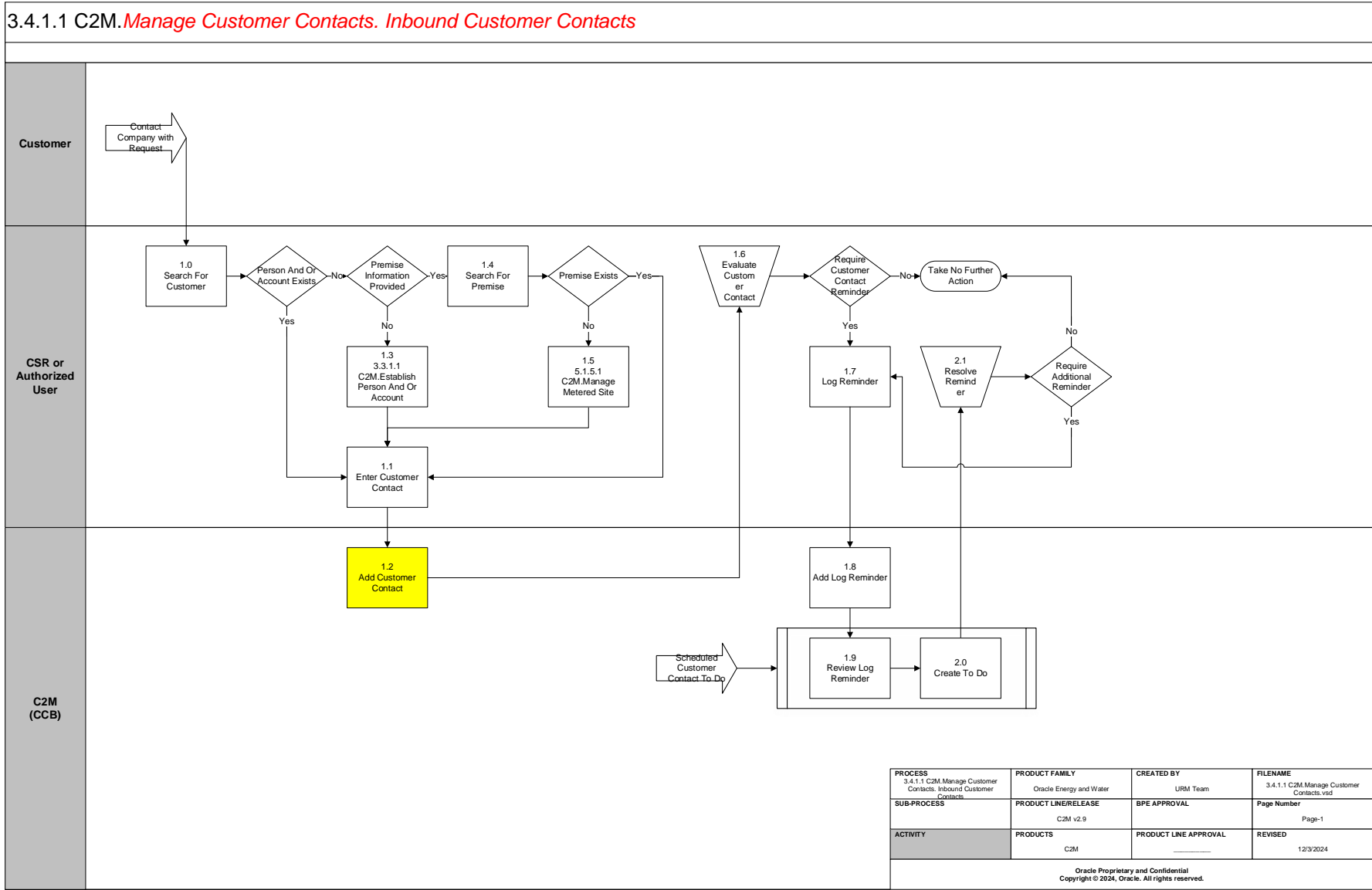
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Brief Description

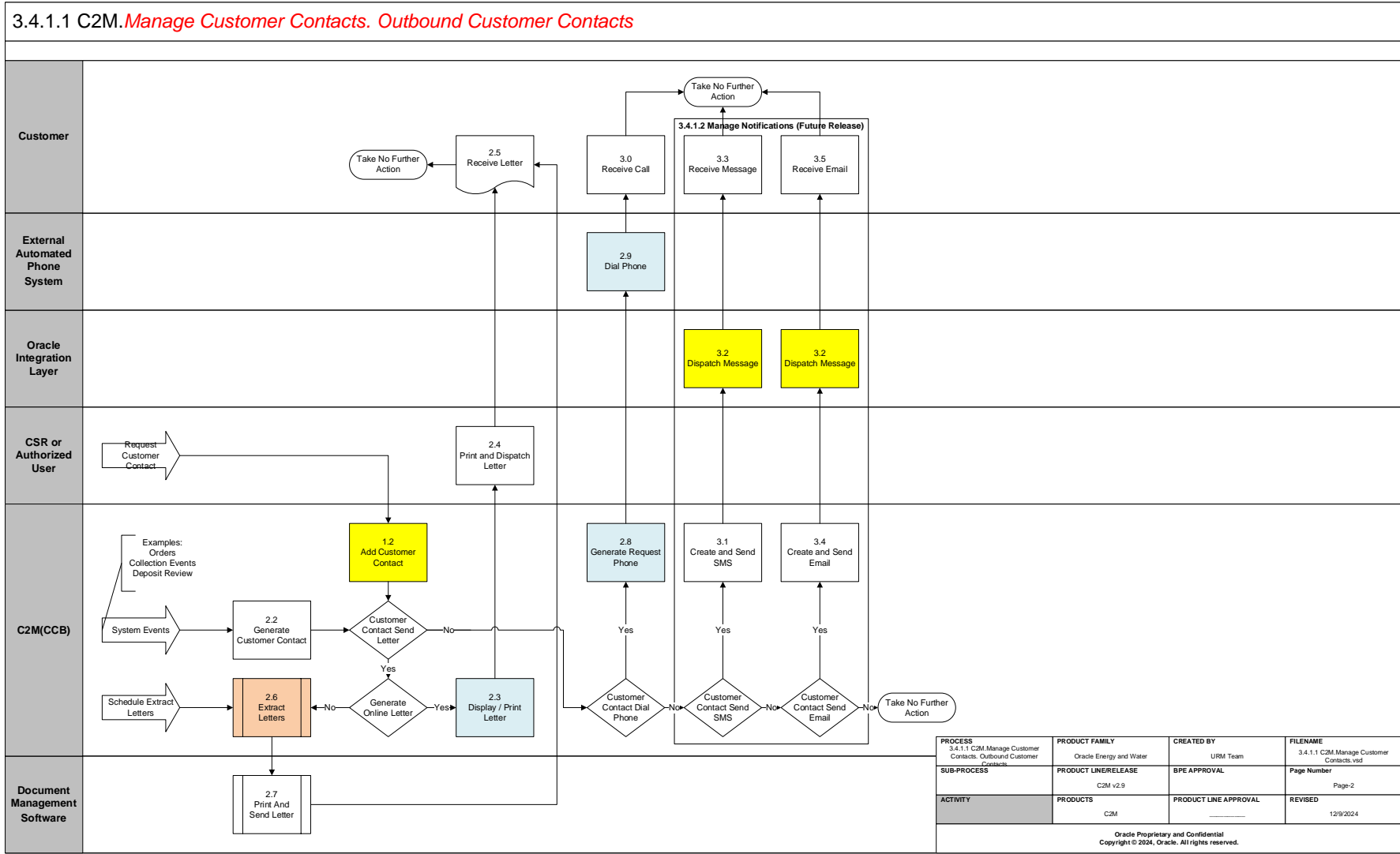
Business Process: 3.4.1.1 C2M.Manage Customer Contacts
Process Type: Process
Parent Process: 3.4.1 C2M.Manage Contacts
Sibling Processes:

Customer contacts are used to record when customers contact a company and why. This process also represents typical activity Company has when decides communicate to Customer (e.g. send letters, make manual or automated phone calls, SMS and Email). This process provides information how customer contacts are created and utilized in the system.

Business Process Model Page-1



Business Process Model Page-2



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

When a customer contacts the company, the CSR or Authorized User searches for an existing customer through Person and or Account.

1.1 Enter Customer Contact

Actor/Role: CSR or Authorized User

Description:

If a person And Or Premise exists, the CSR or Authorized User will enter customer contact information to maintain records on [Customer Contact Page](#).

1.2 Add Customer Contact

Actor/Role: C2M(CCB)

Description:

The system adds and store customer contact information.

Process Plug-in enabled Y Available Algorithm(s):

C1-TL-CC-EVT - Build Customer Contact Events
--

Configuration required Y Entities to Configure:

CIS Division
Customer Contact Class
Customer Contact Type
Installation Options-Framework
Zone

Business Object Y Business Object:

C1-CreateCustomerContact

1.3 3.3.1.1 Establish Person and or Account

Actor/Role: CSR or Authorized User

Description:

If a person does not exist the process to add a person is provided in 3.3.1.1 Establish Person and or Account.

1.4 Search for Premise

Actor/Role: CSR or Authorized User

Description:

When a customer contacts the company with address information, the CSR or Authorized User searches for an existing premise.

1.5 5.1.5.1 Manage Metered Site

Actor/Role: CSR or Authorized User

Description:

If a premise does not exist the process to add a premise is provided in 5.1.5.1 Manage Metered Site.

1.6 Evaluate Customer Contact

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews customer contact records.

1.7 Log Reminder

Actor/Role: CSR or Authorized User

Description:

If a reminder is needed to follow-up on a customer issue the CSR or Authorized User can log a reminder on the [Customer Contact Log Entry Page](#).

Process Plug-in enabled Y Available Algorithm(s):

F1-TDT-INFO - To Do Information (To Do Type)
F1-TDI-INFO - To Do information (Installation)
F1-VAL-SKILL - Validate Skills: E (Error) or W (Warning)
CCAL-TD - Highlight outstanding to do entries

Configuration required Y Entities to Configure:

To Do Role
To Do Type

1.8 Add Log Reminder

Actor/Role: C2M(CCB)

Description:

The system adds and store log reminders.

1.9 Review Log Reminder

Actor/Role: C2M(CCB)

Description:

The system reviews customer contact reminders.

2.0 Create To Do

Actor/Role: C2M(CCB)

Description:

A background batch process creates a To Do entry for customer contacts that have been flagged to generate a future date To Do.

Configuration required Y Entities to Configure:

Customizable process N Process Name:

To Do Role
To Do Type
Batch Scheduler - Feature Configuration
Batch Control
TD-CCCB - To Do for Customer Contact

2.1 Resolve Reminder

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User resolves logged reminder.

2.2 Generate Customer Contact

Actor/Role: C2M(CCB)

Description:

System events can and will trigger the creation of a customer contact.

Note: The following base system events will use the Algorithms, Business Objects and Scripts to create the Customer Contact during each systems normal processing. Customer Contacts can be turned off if not needed. They may also be added to any processes by using parameters.

- Orders and Campaign
- Lead Event
- Service Credit Membership
- Non Billed Budget Service Agreement Activation
- Meter Reader Remark
- Field Activity Remarks
- Adjustment
- Deposit Review
- Collection Events
- Severance Events
- Write Offs
- Overdue and Cut Process
- Case Management

Process Plug-in enabled Y Available Algorithm(s):

CCEE-CC - Create a customer contact when order is completed (Customer Class)
CAOC-CC - Create customer contact when order is completed (Campaign)
C1-LETCRECC - Create Lead Customer Contact

SCMC-CC - SCM Creation - Create Customer Contact (Membership Creation)
SCMA-CC - SCM Activation - Create Customer Contact (Membership Activation)
SAAT-CC - SA Activation - Create Customer Contact (Non-billed Budget SA Activation)
CC BY TYPCL - Count number of customer contacts (Installation Option Framework - Control Center Alert)
MRRCRECC - Create Customer Contact (Meter Reader Remark - Remark Action)
FACT-CCC - FA Remark Activation - Create Customer Contact
C1-CREATECC - Create Customer Contact (Service Order Management)
C2M-ADJFRCC - Create customer contact (Adjustment Type - Adjustment Freeze)
C1-OE-CC - Create Customer Contact (Overdue Event Type - Event Activation)
C1-CE-CC - Create Customer Contact (Cut Event Type - Event Activation)
CSEN-CC - Create Customer Contact (Case Type - Enter Status)

Configuration required Y Entities to Configure:

CIS Division
Customer Contact Class
Customer Contact Type
Customer Contact Characteristic Type
Navigation Option
Meter Reader Remark
Field Activity Type
Field Activity Remark
Field Activity Characteristic Type
Field Activity Remark Characteristic Type
Service Task Characteristic Type
ToDo Type
ToDo Role
Campaign

Business Object Y

Business Object:

Customer Class
Service Credit Membership Type
SA Type
Lead Event Type
Message Category
Message Number
Collection Process Template
Collection Event Type
Severance Process Template
Severance Event Type
Write off Process Template
Write off Event Type
Overdue Process Template
Overdue Event Type
Cut Process Template
Cut Process Event Type
Case Type

Process Scripts

Scripts:

C1-CreateCustomerContact
C1-CreateCustContactTaskType
C1-LeadEvtTypeCreCCAbtInitv
C1-ExpireCreditCardCustContact
C1-CreateCustomerContactTask
C2M-CreateAdjCustomerContact
C1-FWCustomerContact

C1-CreCustCn - Create Customer Contact (Plugin Script)
C1-CreCsCt - Create Customer Contact (Service Script)
C1-CreateCC - Create Customer Contact Task (Service Script)
C1-LdEvTyCCV - Create Customer Contact Event Type Validation
C1-LECCreCC - Create Lead Customer Contact

Customizable Process	Process Name:	C1-ExpCardLe - Activity Request - Auto Pay Expiring Credit Card Notice
		C2M-AdjFrCC - Create CC on adjustment freeze (used on NSF adjustment type)
		DEPRVW - Deposit Review Batch Job

2.3 Display / Print Letter**Actor/Role:** C2M(CCB)**Description**

Letter can be rendered / printed online through BI-Publisher as Report having an image of the letter in a PDF and displayed in an Adobe reader.

Note: Customer contacts that generate letters can only be Person-Based customer contacts.**Process Plug-in enabled N** **Available Algorithm(s):**

C1-ONLTR-RPT - Display a letter using BI Publisher
C1-LTREX-RPT

Configuration required Y **Entities to Configure:**

Installation Options - Framework (System Event - Online Letter Image)
--

Customizable process Y **Process Name:**

CI_LTRGN_ENG - Letter Print Report

2.4 Print and Dispatch Letter**Actor/Role:** CSR or Authorized User**Description:**

CSR or Authorized User will print and dispatch the letter to the customer.

2.5 Receive Letter**Actor/Role:** Customer**Description:**

Customer receives generated letter.

2.6 Extract Letters**Actor/Role:** C2M(CCB)**Description**

Background batch process calls up each customer contact letter template. Information from letter templates is extracted to letters.

Process Plug-in enabled Y **Available Algorithm(s):**

LTEX-GEN - Create generic letter extract records
LTEX_COL - Create collection event letter extract records

Configuration required N	Entities to Configure:	LTEX-SEV - Create severance event letter extract records
		LTEX-WO - Create write-off event letter extract records
		C1-OD-BILL - Create Overdue Event Letter Extract Records
		LTEX-WF - Create workflow event letter extract records
Customizable process Y	Process Name:	Collection Event Type
		Severance Event Type
		Write Off Event Type
		Letter Template
		LTRPRT - Letter Extract

2.7 Print and Send Letter

Actor/Role: Document Management System

Description:

Letters are automatically passed to print software as an alternate print/routing method.

2.8 Generate Request Phone

Actor/Role: C2M(CCB)

Description:

If an automated phone call is required the customer phone number is automatically processed through the system.

Customizable process Y	Process Name:	Automated Dialer Software
		Automated Dialer User Interface
Configuration required Y	Entities to Configure:	Navigation Key

2.9 Dial Phone

Actor/Role: External Automated Phone System

Description:

If an automated phone call is required the customer phone number is automatically processed through the External Automated Phone System.

3.0 Receive Call

Actor/Role: Customer

Description:

The customer receives a call from the company.

3.1 Create and Send SMS Group: 3.4.1.2 Manage Notifications

Actor/Role: C2M(CCB)

Description:

If customer provided phone number that allows sending SMS, the system creates and sends the SMS to the customer.

3.2 Dispatch Message Group: 3.4.1.2 Manage Notifications

Actor/Role: Oracle Integration Layer

Description:

Oracle Integration Layer is being used to send SMS (Text) to a given phone number or email to the email address.

3.3 Receive Message Group: 3.4.1.2 Manage Notifications

Actor/Role: Customer

Description:

The customer receives a SMS (Text) Message from the company.

3.4 Create and Send Email Group: 3.4.1.2 Manage Notifications

Actor/Role: C2M(CCB)

Description:

If customer provided e-mail address, the system creates and sends the e-mail to the customer.

3.2 Receive Email Group: 3.4.1.2 Manage Notifications

Actor/Role: Customer

Description:

The customer receives an Email from the company.

Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets
1	URM-C2M-3411-001-Create-Existing-Person-Or-Business-Customer-Contact	4
2	URM-C2M-3411-002-Create-Existing-Person-Or-Business-Customer-Contact-With-Reminder	4
3	URM-C2M-3411-003-Create-Existing-Premise-Customer-Contact	2
4	URM-C2M-3411-004-Create-Existing-Premise-Customer-Contact-With-Reminder	2

Document Control

Change Record

Date	Author	Version	Change Reference
8/11/2017	Kashif Q. Qureshi	Draft	Updated for C2M
8/18/2017	Kashif Q. Qureshi	Final Draft	
09/20/2017	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7
10/27/2024	Kunal Nerkar		Updated Document and Visio for C2M v2.9
11/26/2024	Line Prado		Reviewed
12/16/2024	Galina Polonsky		Reviewed, Approved

Attachments

Customer Contact Page

ORACLE Customer Cloud Service

Home

Menu

Admin

Search Menu

History

Customer Contact: Kunal,NBB, , Non-billed budget contacts / Non-billed budget activated, Contacted 04-18-2020

Add

Search

Bookmark

Refresh

Main

Log

Customer Contact

Main

INFORMATION

CONTACT CLASS

CONTACT TYPE

USER

PERSON

ACCOUNT

PREMISE

PREFERRED CONTACT METHOD

LETTER INFORMATION

PRINT LETTER

Kunal,NBB, , Non-billed budget contacts / Non-billed budget activated, Contacted 04-18-2020

Non-billed budget contacts

Non-billed budget activated

Nerkar, Kunal

Kunal,NBB

Kunal,NBB, Residential, \$0.00

Non-billed budget plan (CIR-NBB-PLAN) will be printed on 04-18-2020 7:51:36.

Record Actions

Edit

Record Information

Characteristics

CHARACTERISTIC TYPE	CHARACTERISTIC VALUE
Service Agreement	California / NBB-MRR, Active, 08-01-2019, 0295313489

Customer Contact Reminders

Add Reminder

Customer Contact Log Entry Page

ORACLE Customer Cloud Service

Home

Menu

Admin

Search Menu

History

Customer Contact: Kunal,NBB, , Non-billed budget contacts / Non-billed budget activated, Contacted 04-18-2020

AddSearchBookmarkRefresh

MainLog

Customer Contact Log

Add Log Entry

FILTERS: CUSTOMER CONTACT ID 2406894555

	DATE/TIME	DETAILS	USER	LOG TYPE	RELATED OBJECT	EVENT DATE/TIME	INTEGRATION STATUS	STATUS REASON
1	04-18-2020 7:51:37	Created.	Nerkar, Kunal (KNERKAR)	Created				