



C2M v2.9

3.4.2.1 Maintain Customer Profile

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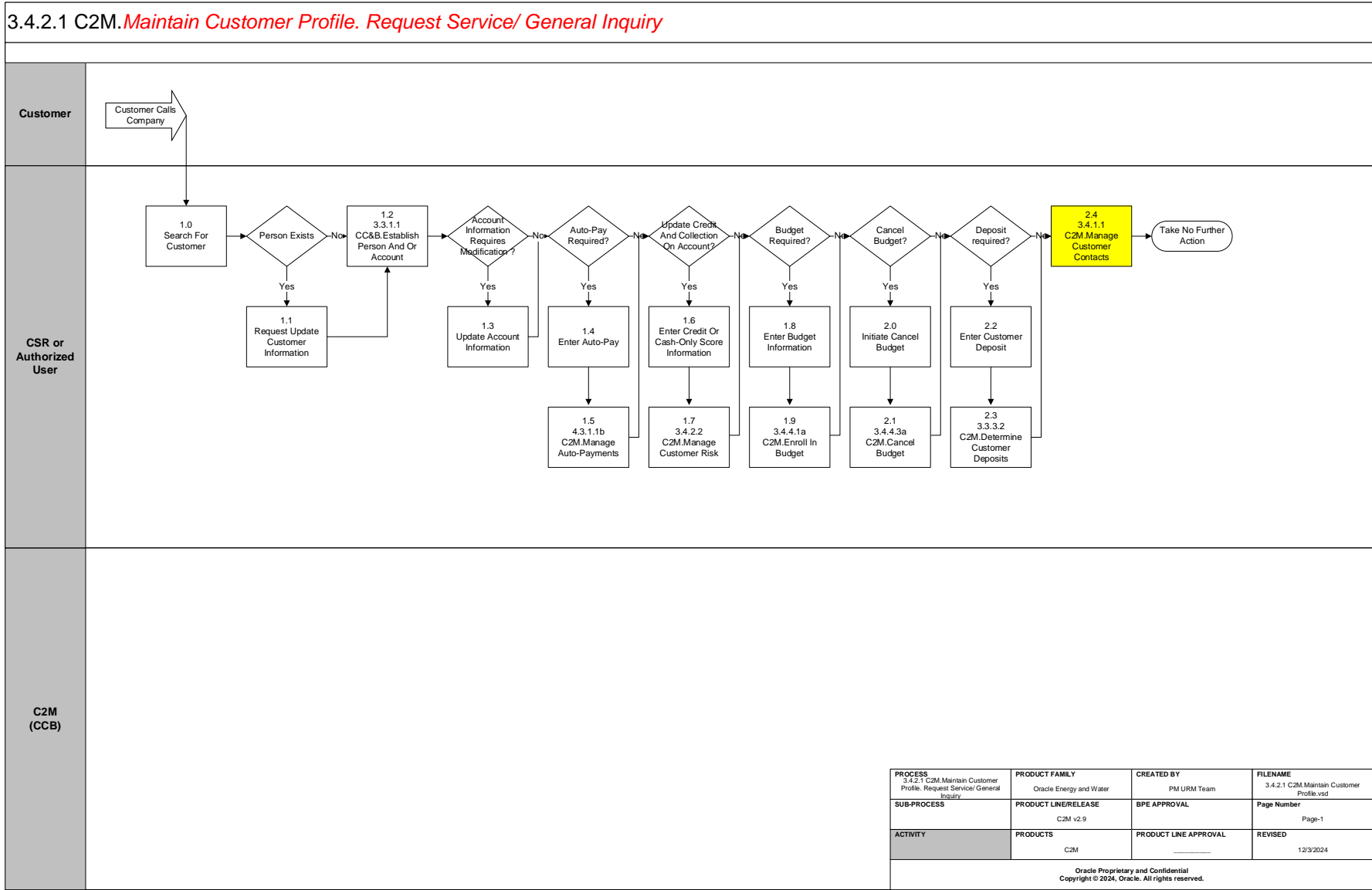
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Brief Description

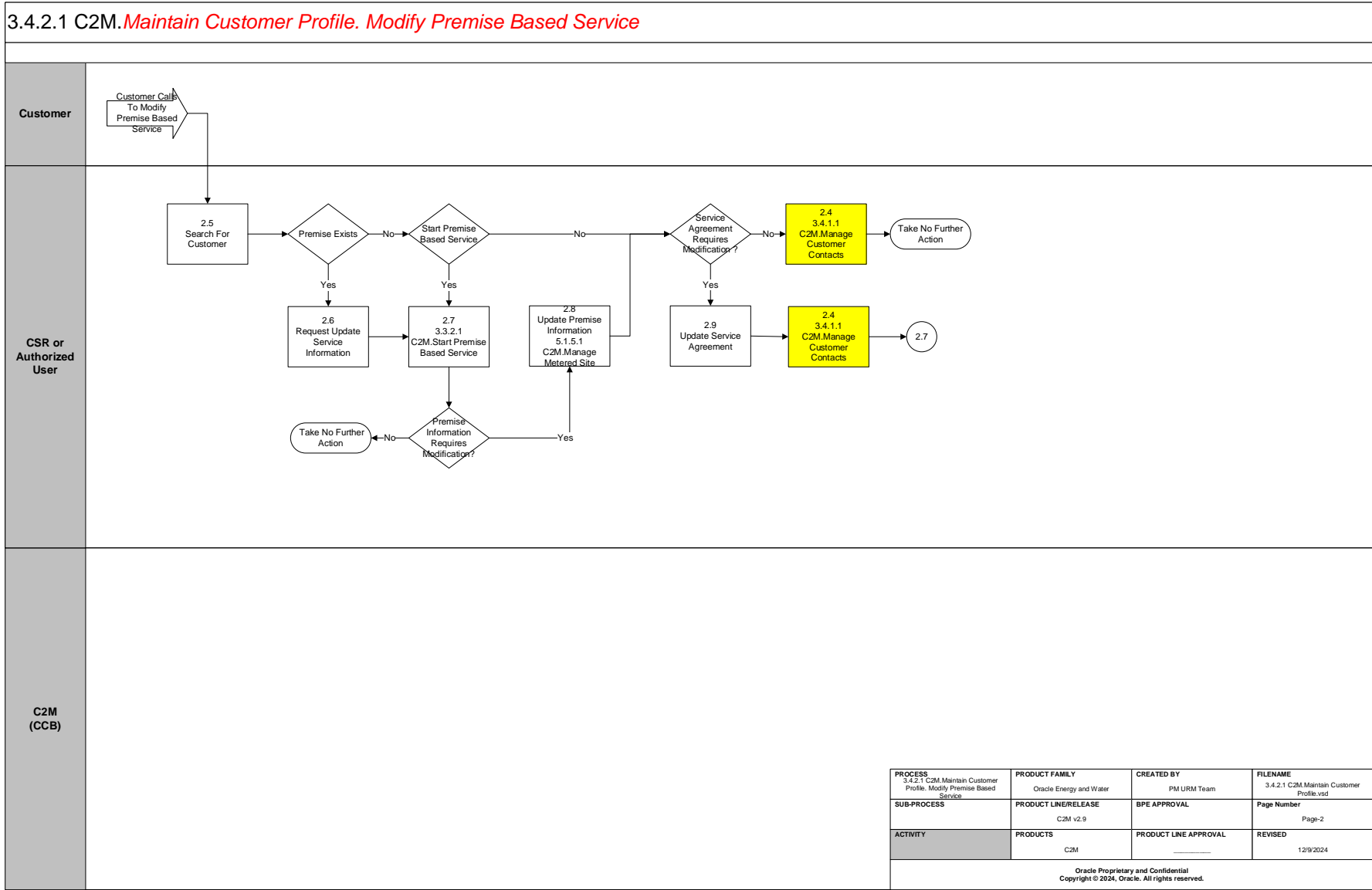
Business Process: 3.4.2.1 C2M.Maintain Customer Profile
Process Type: Sub-Process
Parent Process: 3.4.3 C2M.Provide Customer Service
Sibling Processes:

This process describes typical scenarios regarding how the system allows the Company to store and update customer profiles.

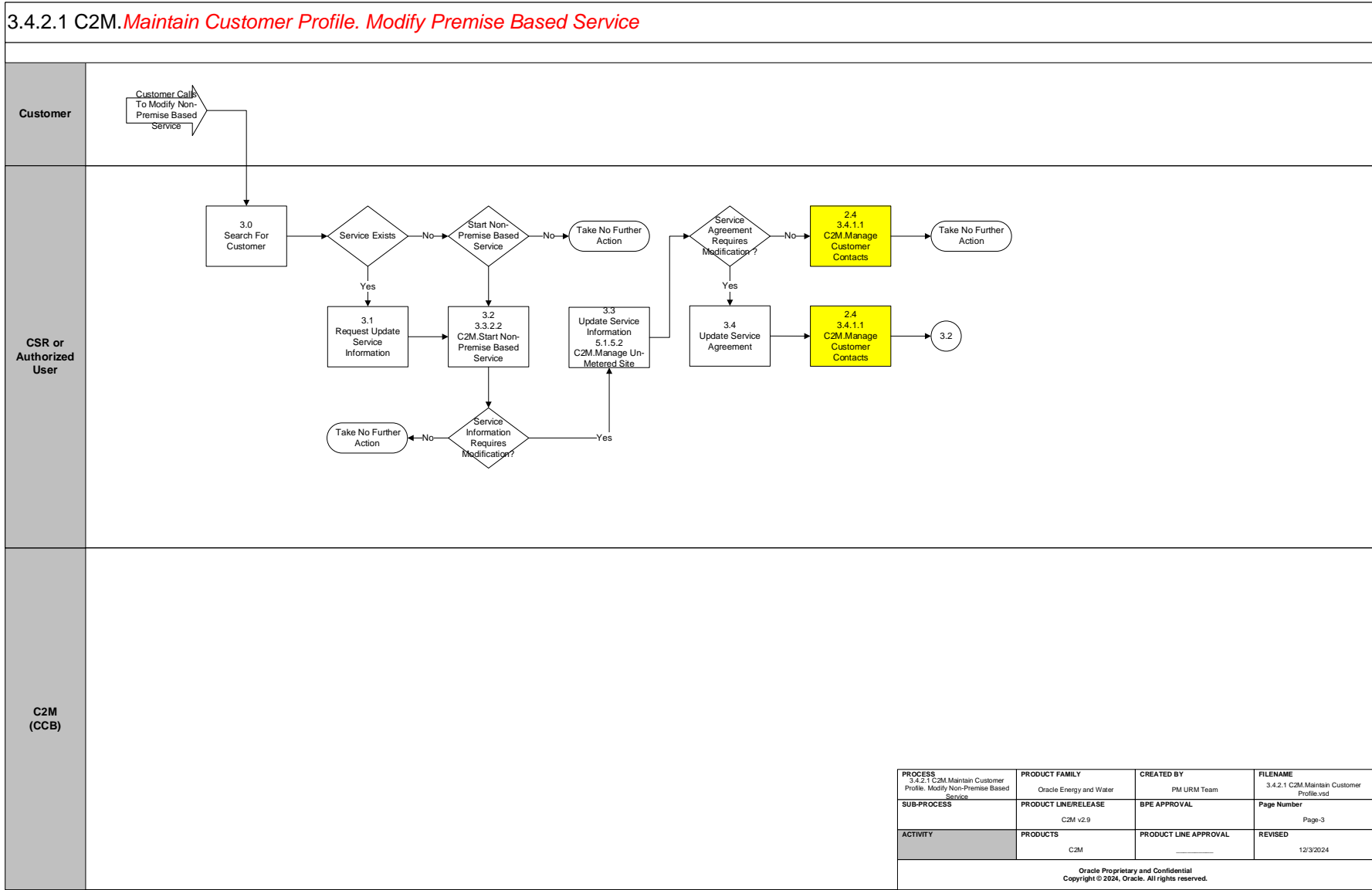
Business Process Model Page 1



Business Process Model Page 2



Business Process Model Page 3



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

As a result of a customer request, the first step is to determine if that person exists or, if not, create a new person. The CSR is responsible for fulfilling customer requests.

1.1 Request Update Customer Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is responsible for updating customer information.

1.2 3.3.1.1 C2M.Establish Person and or Account

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User creates a person and/or an account. Refer to 3.3.1.1 C2M.Establish Person and or Account.

1.3 Update Account Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User updates the required account information. Refer to 3.3.1.1 C2M.Establish Person and or Account.

1.4 Enter auto-pay

Actor/Role: CSR or Authorized User

Description:

If the customer requires automatic payment on their account, enter the auto-pay information. Refer to 4.3.1.1b C2M.Manage Auto-Payments

1.5 4.3.1.1b CC&B.Manage Auto-Payment

Actor/Role: CSR or Authorized User

Description:

If the customer requires automatic payment on their account, enter auto-pay information. Refer to 4.3.1.1b C2M.Manage Auto-Payments

1.6 Enter Credit or Cash-Only Score Information

Actor/Role: CSR or Authorized User

Description:

If the customer's credit or cash-only score is required, enter credit or cash-only score information. The process is provided 3.4.2.2 C2M.Manage Customer Risk.

1.7 3.4.2.2 C2M.Manage Customer Risk

Actor/Role: CSR or Authorized User

Description:

Customers credit risk processes are provided in 3.4.2.2 C2M.Manage Customer Risk.

1.8 Enter Budget Information

Actor/Role: CSR or Authorized User

Description:

If a customer requires a budget, enter budget information. The process is provided in 3.4.4.1a C2M.Enroll in Budget.

1.9 3.4.4.1a C2M.Enroll in Budget

Actor/Role: CSR or Authorized User

Description:

The Budget enrollment process is provided in 3.4.4.1a C2M.Enroll in Budget.

2.0 Initiate Cancel Budget

Actor/Role: CSR or Authorized User

Description:

If a budget cancellation is required, initiate cancellation. The process is provided in 3.4.4.3a C2M.Cancel Budget.

2.1 3.4.4.3a C2M.Cancel Budget

Actor/Role: CSR or Authorized User

Description:

The Budget cancellation process is provided in 3.4.4.3a C2M.Cancel Budget.

2.2 Enter Customer Deposit

Actor/Role: CSR or Authorized User

Description:

If a customer deposit is required, enter the deposit information. The process is provided in 3.3.3.2 C2M.Determine Customer Deposit (Cash, Non-cash, 3rd party).

2.3 3.3.3.2 C2M.Determine Customer Deposit, (Cash, Non-cash, 3rd party)

Actor/Role: CSR or Authorized User

Description:

The Cash, non-cash and third-party deposit process is provided in 3.3.3.2 C2M.Determine Customer Deposit (Cash, Non-cash, 3rd party).

2.4 C2M.Manage Customer Contacts

Actor/Role: CSR or Authorized User

Description:

The CSR or authorized user creates a customer contact to record the transaction between the Customer and the Company. The process is provided in C2M.Manage Customer Contacts.

2.5 Search for Customer

Actor/Role: CSR or Authorized User

Description:

As a result of a customer request, the first step is to determine if the person exists or a new person needs to be created. The CSR is responsible for fulfilling customer requests.

2.6 Request Update Service Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is responsible for updating service information on the premise

2.7 3.3.2.1 C2M.Start Premise Based Service

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User starts service for a premise. Refer to 3.3.2.1 C2M.Start Premise Based Service.

2.8 Update Premise Information 5.1.5.1 C2M.Manage Metered Site

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User will update required information for the premise. Refer to 5.1.5.1 C2M.Manage Metered Site

2.9 Update Service Agreement

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User will update required information for the service agreement.

3.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

As a result of a customer request, the first step is to determine if the person exists or a new person needs to be created. The CSR is responsible for fulfilling customer requests.

3.1 Request Update Service Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is responsible for updating service information.

3.2 3.3.2.1 C2M.Start Non-Premise Based Service

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User starts service for a non-premise based service. Refer to 3.3.2.2 C2M.Start Non-Premise Based Service.

3.3 Update Service Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is responsible for updating service information. Refer 5.1.5.2 C2M.Manage Un-Metered Site

3.4 Update Service Agreement

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User updates the required information for the Service Agreement.

Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets

Document Control

Change Record

Date	Author	Version	Change Reference
4/27/09	Stephanie Rogers	Draft 1a	No Previous Document
10/21/10	Geir Hedman		Update Title and Content page
2/8/11	Geir Hedman		Update Document and Visio
08/13/13	Dean Davis		Update Document and Visio
10/10/2013	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated word and visio to v2.6
09/22/2017	James Forman		Updated word and visio to C2M
10/15/2013	Galina Polonsky		Reviewed, Approved
08/20/2018	Jerry Chick		Replaced the Visio flow diagrams. Added step 2.4.1 Create Customer Contact. Other grammatical and syntax corrections.
08/29/2018	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7
10/30/2024	Kunal Nerkar		Updated word and visio for C2M v2.9
11/26/2024	Line Prado		Reviewed
12/18/2024	Galina Polonsky		Reviewed, Approved

Attachments