



**C2M v2.9**

## **4.2.2.8 Manage Billing Disputes**

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## Brief Description

<b>Business Process:</b>	<b>4.2.2.8 C2M.Manage Billing Disputes</b>
<b>Process Type:</b>	<b>Sub Process</b>
<b>Parent Process:</b>	<b>4.2.2 C2M.Manage Bill</b>
<b>Sibling Processes:</b>	<b>3.4.1.1 C2M. Manage Customer Contacts, 4.2.2.2 C2M.Manage Meter Charges, 4.2.2.3 C2M.Manage Item Charges, 4.2.2.4 C2M.Manage External and Miscellaneous Charges, 4.2.2.5 C2M.Manage Loan Charges, 4.2.2.6 C2M.Manage Deposit Charges, 4.2.2.14 C2M.Manage Off Cycle Charges, 4.3.2.4a C2M.Manage Payment Arrangements, 4.3.2.3a C2M.Manage Pay Plan, 3.4.4.1b C2M.Enroll in Non-Billed Budget, 3.4.4.1a C2M.Enroll in Budget,</b>

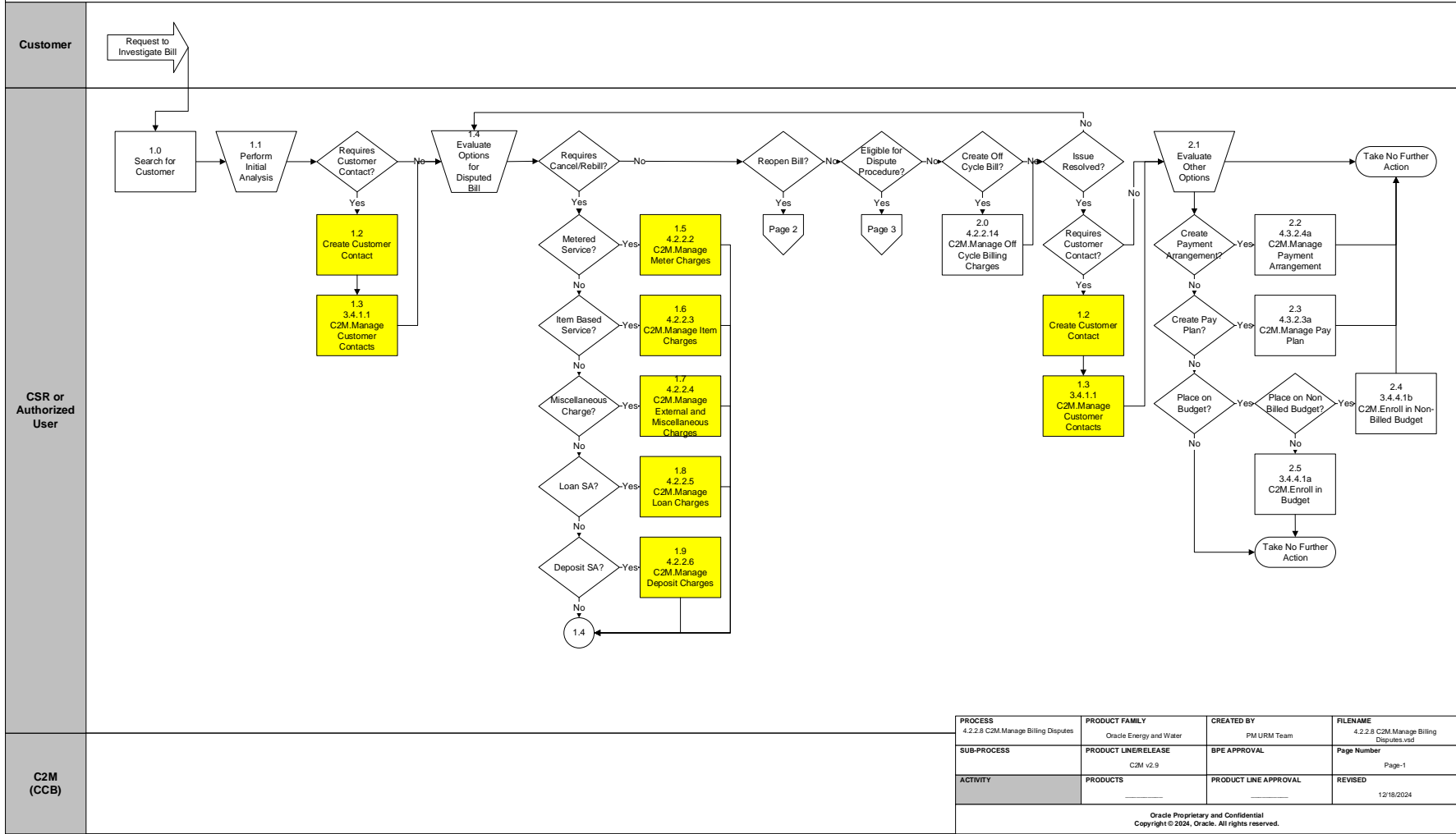
This process describes alternatives for managing the tracking and resolution of a customer disputed bill in C2M(CCB). To resolve a disputed bill or charges in question, the CSR or Authorized may make use of the following options in base C2M(CCB):

- Cancel/Rebill
- Reopening of current Bill
- Off Cycle Billing
- Pay Plans
- Payment Arrangements
- Budget Plans
- Protect Account against Credit and Collection Review while dispute is in progress
- Transfer disputed amounts to a separate SA while dispute is in progress
- Record interaction with customer through Customer Contacts and automatic reminders for follow up

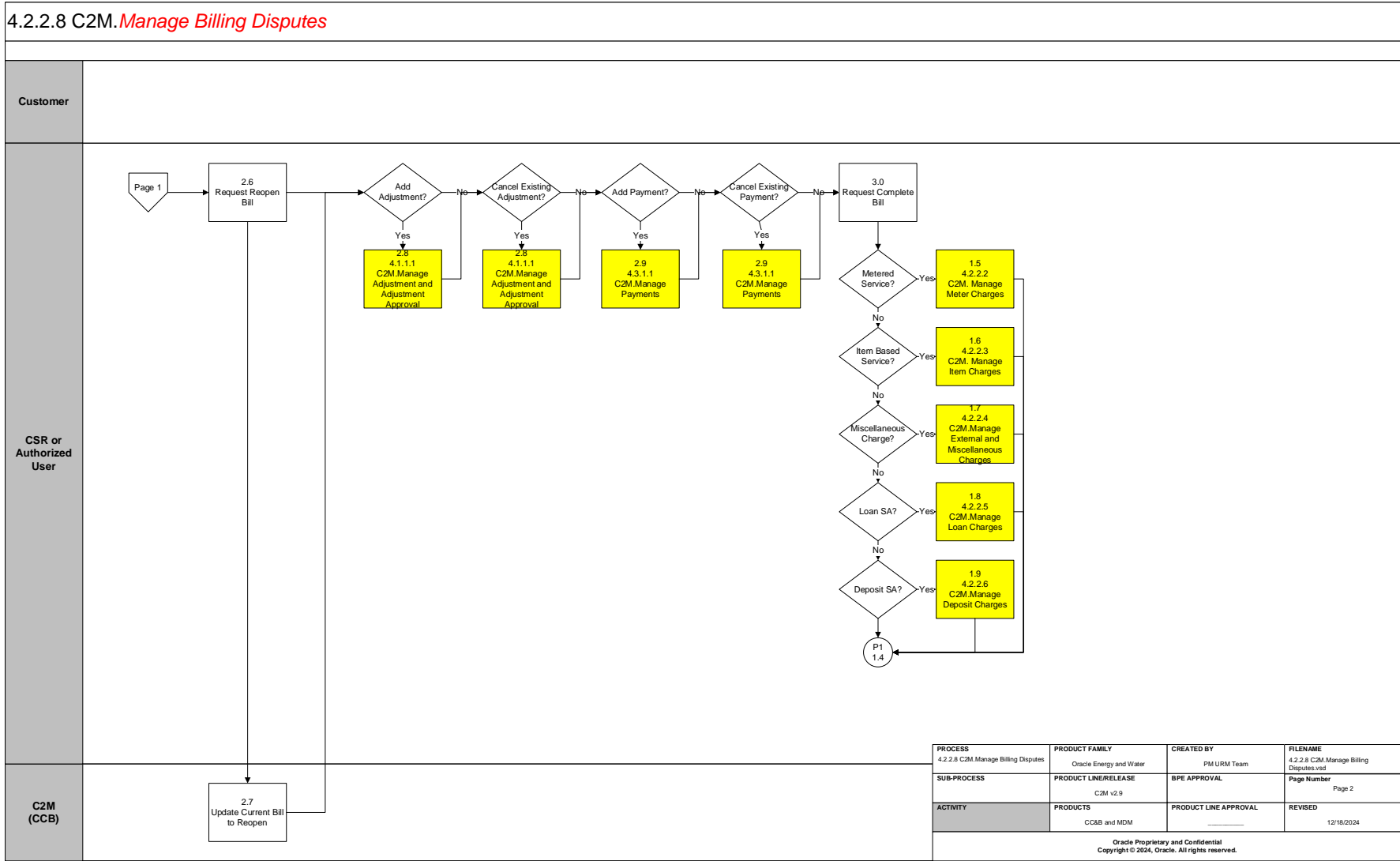
In addition, an organization may use C2M “Case Management” functionality to further track and document the details of a disputed amount with the customer. Case Management allows for lifecycle statuses as the disputes moves through resolution. The lifecycle statuses provide visibility across users in C2M. This is considered custom configuration to be developed by the individual organization. C2M(CCB) documentation is available as a guide for developing this functionality.

Business Process Model Page 1

4.2.2.8 C2M.Manage Billing Disputes



Business Process Model Page 2



Customer

CSR or Authorized User

C2M (CCB)

```

graph TD
    Start([Page 1]) --> 3.1[/3.1 Evaluate C&C Impact/]
    3.1 --> 3.2{Postpone Credit Review?}
    3.2 -- Yes --> 3.2[3.2 Determine Postpone Credit Review Date and Request Update]
    3.2 -- No --> 3.5{3.5 Select Dispute SA and Request Start}
    3.2 -- Yes --> 3.3[3.3 Update Account C&C Details]
    3.2 -- Yes --> 3.4{3.4 Create Reminder}
    3.4 -- Yes --> 1.3[1.3 C2M Manage Customer Contacts]
    3.4 -- No --> 3.5
    3.5 --> 3.6[3.6 C2M Start Non-Premise Based Service]
    3.6 --> 2.8[2.8 C2M Manage Adjustment and Approval]
    2.8 --> 3.7[3.7 Confirm Disputed Amount]
    3.7 --> 3.8[3.8 Transfer Dispute Amount to Dispute SA]
    3.8 --> 2.8
    2.8 --> 3.9[/3.9 Analyze Issue and Resolution/]
    3.9 --> 4.0{4.0 Create Service Investigation Field Activity}
    4.0 --> 4.1[4.1 C2M Manage Field Activities and Service Orders]
    4.1 --> 4.2[4.2 Reinstatement Original Disputed Amount]
    4.2 --> 2.8
    4.2 --> 4.3[4.3 Remove Postpone Credit Review Date and Request Update]
    4.3 --> 3.3
    4.3 --> 4.4[4.4 Create Customer Contact with Final Resolution Details]
    4.4 --> 1.3
    1.3 --> P1_2.1((P1 2.1))
  
```

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
4.2.2.8 C2M Manage Billing Disputes	Oracle Energy and Water	PM URM Team	4.2.2.8 C2M Manage Billing Disputes.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE	BPE APPROVAL	Page Number
	C2M v2.9		Page 3
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED
	C&B and MDM		12/18/2024

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## Detail Business Process Model Description

### 1.0 Search for Customer

**Actor/Role:** CSR or Authorized User

**Description:**

Upon receipt of a customer inquiry for a disputed bill, the CSR or Authorized User accesses [Control Central Search](#) to locate the customer in C2M(CCB).

**Configuration required Y**

**Entities to Configure:**

Installation Options
----------------------

### 1.1 Perform Initial Analysis

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User performs an initial, overall analysis of the Account. Typically, there are established guidelines and business rules for analyzing the disputed amount. There may be a checklist for discussion with the customer. Areas of C2M.are reviewed and may include: [Account Financial History](#), [Billing History](#), [360 View for Service Point](#), [Usage and Device History](#), Account Activity, Field Activity and Service Order information.

### 1.2 Create Customer Contact

**Actor/Role:** CSR or Authorized User

**Description:**

Most organizations routinely document interactions with the customer. The CSR or Authorized User follows established business rules and documents the interaction with the customer through a Customer Contact.

### 1.3 3.4.1.1 C2M.Manage Customer Contacts

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to 3.4.1.1 C2M.Manage Customer Contacts for detailed procedures.

### 1.4 Evaluate Options for Disputed Bill

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User considers options for working through the disputed bill and attempting to resolve the disputed amount with the customer. Each organization has established business rules as well as potential governmental regulations. The options will vary dependent on each customer scenario.

### 1.5 4.2.2.2 C2M.Manage Meter Charges

**Actor/Role:** CSR or Authorized User



**Description:** If cancel / rebill is required on a metered service SA, the CSR or Authorized User initiates the cancel/rebill. If the current bill is reopened for addition or cancellation of adjustments or payments, the CSR or Authorized User then completes the reopened bill. **Refer to 4.2.2.2 C2M.Manage Meter Charges.**

#### **1.6 4.2.2.3 C2M.Manage Item Charges**

**Actor/Role:** CSR or Authorized User

**Description:** If cancel / rebill is required on an item based service SA, the CSR or Authorized User initiates the cancel/rebill. If the current bill is reopened for addition or cancellation of adjustments or payments, the CSR or Authorized User then completes the reopened bill. **Refer to 4.2.2.3 C2M.Manage Item Charges.**

#### **1.7 4.2.2.4 C2M.Manage External and Miscellaneous Charges**

**Actor/Role:** CSR or Authorized User

**Description:** If cancel / rebill is required on external and miscellaneous charges, the CSR or Authorized User initiates the cancel/rebill. If the current bill is reopened for addition or cancellation of adjustments or payments, the CSR or Authorized User then completes the reopened bill. **Refer to 4.2.2.4 C2M.Manage External and Miscellaneous Charges.**

#### **1.8 4.2.2.5 C2M.Manage Loan Charges**

**Actor/Role:** CSR or Authorized User

**Description:** If cancel rebill is required on a loan SA, the CSR or Authorized User initiates the cancel/rebill. If the current bill is reopened for addition or cancellation of adjustments or payments, the CSR or Authorized User then completes the reopened bill. **Refer to 4.2.2.5 C2M.Manage Loan Charges.**

#### **1.9 4.2.2.6 C2M.Manage Deposit Charges**

**Actor/Role:** CSR or Authorized User

**Description:** If cancel / rebill is required on a deposit SA, the CSR or Authorized User initiates the cancel/rebill. If the current bill is reopened for addition or cancellation of adjustments or payments, the CSR or Authorized User then completes the reopened bill. **Refer to 4.2.2.6 C2M.Manage Deposit Charges.**

#### **2.0 4.2.2.14 C2M.Manage Off Cycle Billing Charges**

**Actor/Role:** CSR or Authorized User

**Description:**

If an off-cycle bill is required, the CSR or Authorized User may initiate an off-cycle bill to include specific changes for the Account's financial balance. **Refer to 4.2.2.14 C2M.Manage Off Cycle Billing Charges.**

#### **2.1 Evaluate Other Options**

**Actor/Role:** CSR or Authorized User

**Description:**

Depending on investigative results and dispute resolution, the CSR or Authorized User may offer the customer an option to enter into a Payment Arrangement, Pay Plan or Budget Plan. Each of these options requires consideration within established business rules.

#### **2.2 4.3.2.4a C2M.Manage Payment Arrangement**

**Actor/Role:** CSR or Authorized User

**Description:**

If the customer is eligible for a Payment Arrangement, the CSR or Authorized User may create a Payment Arrangement. **Refer to 4.3.2.4a C2M.Manage Payment Arrangement.**

### **2.3 4.3.2.3a C2M.Manage Pay Plan**

**Actor/Role:** CSR or Authorized User

**Description:**

If the customer is eligible for a Pay Plan, the CSR or Authorized User may set up a Pay Plan. **Refer to 4.3.2.3a C2M.Manage Pay Plan.**

### **2.4 3.4.4.1b C2M.Enroll in Non-Billed Budget**

**Actor/Role:** CSR or Authorized User

**Description:**

If the customer is eligible for a Non-Billed Budget options, the CSR or Authorized User may set up a Non-Billed Budget payment schedule. **Refer to 3.4.4.1b C2M.Enroll in Non-Billed Budget.**

### **2.5 3.4.4.1a C2M.Enroll in Budget**

**Actor/Role:** CSR or Authorized User

**Description:** If the customer is eligible for a traditional levelized Budget Plan, the CSR or Authorized User may enroll the customer in a Budget Plan. **Refer to 3.4.4.1a C2M.Enroll in Budget.**

### **2.6 Request Reopen Bill**

**Actor/Role:** CSR or Authorized User

**Description:**

Resolution may include reopening of the current bill. The reopening of the bill allows for adjustments, payments and rebilling to reflect the financial impact on the current bill.

### **2.7 Update Current Bill to Reopen**

**Actor/Role:** C2M(CCB)

**Description:**

The current bill is reopened in C2M.

### **2.8 4.1.1.1 C2M.Manage Adjustment and Adjustment Approval**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User determines if an adjustment should be added or canceled for the Account's Service Agreement(s). **Refer to 4.1.1.1 C2M.Manage Adjustment and Adjustment Approval.**

### **2.9 4.3.1.1 C2M.Manage Payments**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User determines if a Payment should be added or canceled for the Account’s Service Agreement(s). Redistribution of a payment may be considered. **Refer to 4.3.1.1 C2M.Manage Payments.**

**3.0 Request Complete Bill**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized requests to complete the reopened bill. Refer to the specific C2M billing processes.

**3.1 Evaluate C&C Impact**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User considers potential Credit and Collection impacts for the customer’s Account. Typically, there is further discussion with the customer. Based on established business rules, the CSR or Authorized User may temporarily protect the Account from Credit and Collection processing using the Postpone Review functionality.

**3.2 Determine Postpone Credit Review Date and Request Update**

**Actor/Role:** CSR or Authorized User

**Description:** CSR or Authorized User updates the [Postpone Credit Review Until Date](#) on the Account record. Credit and Collection information is on the C&C tab for the Account record.

**3.3 Update Account C&C Details**

**Actor/Role:** C2M(CCB)

**Description:**

The Account record is updated with the changes for Credit and Collection in C2M(CCB).

**3.4 Create Reminder**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User makes use of the [Customer Contact reminder](#) functionality. A reminder can be created for today or a future date. This functionality is used in conjunction with a specific To Do Type, To Do Roles, and background processing. **Refer to 3.4.1.1 C2M.Manage Customer Contact for further details.**

**3.5 Select Dispute SA and Request Start**

**Actor/Role:** CSR or Authorized User

**Description:**

At times, it may be necessary to transfer monies to a separate Service Agreement while the dispute is in progress. This Service Agreement Type requires configuration that meets the individual organization’s business rules. This configuration may include a Dashboard Alert.

**Configuration required Y      Entities to Configure:**

SA Type and all associated configuration
--

### **3.6 3.3.2.2 C2M.Start Non-Premise Based Service**

**Actor/Role:** CSR or Authorized User

**Description:**

The dispute Service Agreement Type is typically configured as Non-Premise based. **Refer to 3.3.2.2 C2M.Start Non-Premise Based Service for details starting a Non-Premise based Service Agreement.**

### **3.7 Confirm Disputed Amount**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User again reviews and confirms the disputed amount.

### **3.8 Transfer Dispute Amount to Dispute SA**

**Actor/Role:** CSR or Authorized User

**Description:**

Using a specific Adjustment Type for transfers, the CSR or Authorized User shifts the disputed amount from the original Service Agreement to a separate Dispute Service Agreement. **Refer to 4.1.1.1 C2M.Manage Adjustment and Adjustment Approval.**

### **3.9 Analyze Issue and Resolution**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User again considers the overall resolution decision to date, and may have further interaction with the customer. Final resolution may require escalation or further investigation based on business rules or regulatory considerations.

### **4.0 Create Service Investigation Field Activity**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User creates a Field Activity for an actual onsite investigation of the Device and Service Point.

### **4.1 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders**

**Actor/Role:** CSR or Authorized User

**Description:**

**Refer to 5.3.2.1 C2M.SOM Manage Field Activities and Field Orders for the Field Activity lifecycle.**

### **4.2 Reinstate Original Disputed Amount**

**Actor/Role:** CSR or Authorized User

**Description:**

Once the issue is resolved, the disputed amount is moved back to the original Service Agreement. This can be done through a separate transfer Adjustment or cancellation of the existing Adjustment. **Refer to 4.1.1.1 C2M.Manage Adjustment and Adjustment Approval.**

### **4.3 Remove Postpone Credit Review Date and Request Update**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User removes the Credit Review Date to allow for normal Credit and Collection processing. Business rules dictate when this date should be removed.

**4.4 Create Customer Contact with Final Resolution Details**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User creates a separate Customer Contact with the final resolution for the disputed amount. Alternately an existing Customer Contact may be updated with a log entry. **Refer to 3.4.1.1 C2M.Manage Customer Contacts.**

## Test Assets related to the Current Process

Testing Asset Sr.No	Use Case	No Of Data sets
1	URM-C2M-4228-001-Cancel-Rebill-An-Existing-Bill-Customer-Contact-Payment-Arrangement	1
2	URM-C2M-4228-002-Cancel-Rebill-An-Existing-Bill	4
3	URM-C2M-4228-003-Reopen-Completed-Metered-Service-Bill-And-Add-An-Adjustment	1
4	URM-C2M-4228-004-Reopen-Completed-Metered-Service-Bill-And-Cancel-Adjustment	1
5	URM-C2M-4228-005-Reopen-Completed-Item-Based-Service-Bill-And-Add-Payment	1
6	URM-C2M-4228-006-Reopen-Completed-Item-Based-Service-Bill-And-Cancel-Payment	1
7	URM-C2M-4228-007-Dispute-Procedure-By-Postponing-Credit-Review	1
8	URM-C2M-4228-008-Dispute-Procedure-By-Creating-Dispute-SA-And-Service-Investigation-FA	1

## Document Control

### Change Record

Date	Author	Version	Change Reference
6/8/09	Colleen King	Draft	No Previous Document
6/9/09	Colleen King		Updates from Review
6/10/09	Colleen King		Updates from Review
6/15/09	Colleen King		Updates from Review
6/17/09	Colleen King		Updates from Review for 4.2.2.2 applicable to this process
10/21/10	Geir Hedman		Updated Title and Content page
11/24/10	Yoko Iwahiro		Framework updates.
12/27/10	Ayelet Lavee		Release review made changes to sibling process, hyperlinks, Minor editing
2/9/11	Geir Hedman		Updated Document and Visio
3/28/2011	Conrad Pinili		Updated document – Process Plug-Ins
9/19/13	Becky Ray		Updated document for v2.4
9/24/2013	Dean Davis		Updated document for v2.4
09/30/2013	Galina Polonsky		Reviewed, Approved
08/29/2017	Joshua Piccott		Updated document for C2M CCB v2.6
12/18/2017	Jeffrey Yoong		Updated document and Visio
12/22/2017	Colleen King		Updated document and Visio
12/23/2017	Galina Polonsky		Reviewed, Approved
09/18/2018	Debby Phelps		Updated document and Visio
10/02/2018	Galina Polonsky		Reviewed, Approved
6/3/2019	Satya Kalavala		Updated format for v2.7
05/27/2024	Kunal Nerkar		Updated document and Visio for C2M v2.9
05/28/2024	Line Prado		Reviewed
12/18/2024	Galina Polonsky		Reviewed, Approved

# Attachments:

## Control Central Search

Control Central Search

Bookmark

Refresh

Main

Control Central Search

Search By

Name and Address

Name

mark,

Address

City

Postal

CIS Division

Show All Premises

☒

Search

Hide Filters

Person/Account	Premise	ID Type	ID Nbr
Mark,Brazil - Home Phone: (415) 093-7829 (Main customer - Acct. 0221264307)	100 Switch Back Road, Apt. 105, Fremont, CA, 94516	Social security number	*****5711



Account Financial History

Account Financial History

Bookmark

Refresh

Main

Account Financial History ⓘ

🔍

📄

⬆

Search By

Arrears Date ▾

Expand Filters

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1	04-12-2017	Pay Segment	\$-120.01	\$0.00	\$-120.01	\$0.00
2	04-01-2017	Bill Segment	\$120.01	\$120.01	\$120.01	\$120.01
3	03-13-2017	Pay Segment	\$-99.25	\$0.00	\$-99.25	\$0.00
4	03-01-2017	Bill Segment	\$99.25	\$99.25	\$99.25	\$99.25
5	02-13-2017	Pay Segment	\$-113.23	\$0.00	\$-113.23	\$0.00
6	02-01-2017	Bill Segment	\$113.23	\$113.23	\$113.23	\$113.23

SA Billing History

SA Billing History

Bookmark

Clear

Save

Refresh

Main

Account ID ⓘ 0221264307 Mark,Brazil, Residential, \$0.00

SA Information California / Electric Residential, ERES1, Active, 01-01-2017, Single-family / electric heat discount, 0226899702

SA ID ⓘ 0226899702 🔍

	Start Date	End Date	Days	Status	Current Amount	Payoff Amount	UOM	Billable Service Quantity	Average Daily Service Quantity
🔗	03-01-2017	04-01-2017	31	Frozen	\$120.01	\$120.01	Kilowatt-Hours	1155.000000	37.26
🔗	02-01-2017	03-01-2017	28	Frozen	\$99.25	\$99.25	Kilowatt-Hours	944.000000	33.71
🔗	01-01-2017	02-01-2017	32	Frozen	\$113.23	\$113.23	Kilowatt-Hours	1086.000000	33.94

Dashboard

Alerts ⓘ

⌵

⌴

Last Contact: 963 days ago - Murray,Lynette

Payment Arrangement

Deposit SA Exists

Landlord Exists

Premise is linked to a Parent Premise

2 Outstanding To Do Entries For Account

1 Outstanding To Do Entries For Person

1 Outstanding To Do Entries For Premise

Stopped SAs Exist

3 sync request(s) outstanding

Scheduled to bill today

Full Context ⓘ

⌵

⌴

👤

Walter,Rick

⌵

📅

Walter,Rick, Residential, \$460.13

⌵

🏠

101 Spruce Court, San Francisco, CA, 94114

⌵

🖨

101 Spruce Court, San Francisco, CA, 94114 / Electric Residential / Electric / ER-1000028 / Read Cycle 01, Route 100 / Active

⌵

📄

ER-1000028 / Electric Manual Read Meter - Digital / Install Date/Time: 01-15-2017 0:00:00 PST / On / Active

⌵

🕒

ER-1000028 / Electric Scalar kWh - Manual Read

⌵

360 View

360 Degree View

Search by Name

Search by Address

Search by Device

Bookmark

Refresh

Measuring Component

Device

Service Point

Usage Subscription

Contact

Measuring Component Overview

Measuring Component

Service Point

Installation

Usage Subscription

ER-1000012 / Electric Scalar kWh - Manual Read

100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active

Install Date/Time: 01-01-2017 0:00:00 PST / On

Mark,Brazil / Home Phone (415) 093-7829 / Electric - Residential / 01-01-2017 0:00:00 PST / Active

Device Configuration Overview

	Type	Information	360	
1	Manual Meter	ER-1000012 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2017 0:00:00 PST / On / Active		
2	Device Configuration	Electric Manual Read Meter - Digital / Effective Date/Time:01-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active		New Reading
3	Register	ER-1000012 / Electric Scalar kWh - Manual Read	360	
4	Service Point - MDM	100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active	360	Install Date/Time: 01-01-2017 0:00:00 PST / On

Account C&C – Postpone Credit Review

Account

Bookmark

Delete

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

Account

Mark,Brazil, Residential, \$0.00

Account ID 0221264307 2

Collection Class

Residential

Postpone Credit Review Until

01-01-2024

Last Credit Review Date

09-07-2023

Current Credit Rating

1000

Current Cash Only Score

400

Credit Rating History

**New**

Start Date

Credit Rating History ID

End Date

Affect Credit Rating By

Affect Cash-Only Score By

Comments

Customer Contact Reminder

Customer Contact: Brazil,Mark S, 389 Church Street, San Francisco, CA, 94111 , General contac...

Add

Search

Bookmark

Refresh

Main

Log

Customer Contact

Main

InformationBrazil,Mark S, 389 Church Street, San Francisco, CA, 94111 , General contacts / General inquiry, Contacted 01-24-2017

Contact ClassGeneral contacts

Contact TypeGeneral inquiry

UserMurray, Lynette

PersonBrazil,Mark S - Home Phone: (510) 576-0055

AccountBrazil,Mark S, Residential, \$1,745.11

Premise389 Church Street, San Francisco, CA, 94111

Preferred Contact MethodNot Applicable

CommentsCustomer called about budget billing options

Record Actions

Edit

Record Information

Characteristics

Characteristic Type

Characteristic Value

Customer Contact Reminders

Add Reminder

	Create Date/Time	Created by	Reminder	Reminder Type	Send To	Trigger Date	Edit	Delete
1	01-24-2017 14:32:09	Murray, Lynette ( LMURRAY )	Call back in 30 days	Send to User	Nerkar, Kunal	02-24-2017		

4.2.2.8 C2M.Manage Billing Disputes

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