**CCS**

**24B**

**3.4.1.1** **Manage Customer Contacts**

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## Brief Description

**Business Process: 3.4.1.1 CCS.Manage Customer Contacts**

**Process Type: Process**

**Parent Process: 3.4.1 CCS.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**](#_Business_Process_Model) **Search for Customer**

A**ctor/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**](#BPM1) **Enter Customer Contact**

A**ctor/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](#_Customer_Contact_Page:).

[**1.2**](#BPM1) **Add Customer Contact**

A**ctor/Role: CCS(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.**](#BPM1)**3 3.3.1.1 Establish Person and or Account**

A**ctor/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**](#BPM1) **Search for Premise**

A**ctor/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.**](#BPM1)**5 5.1.5.1 Manage Metered Site**

A**ctor/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.**](#BPM1)**6 Evaluate Customer Contact**

A**ctor/Role: CSR or Authorized User**

**Description:**

The CSR or Authorized User reviews customer contact records.

[**1.**](#BPM1)**7 Log Reminder**

A**ctor/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](#_Customer_Contact_Log).

**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.**](#BPM1)**8 Add Log Reminder**

A**ctor/Role: CCS(CCB)**

**Description:**

The system adds and store log reminders.

[**1.**](#BPM1)**9 Review Log Reminder**

A**ctor/Role: CCS(CCB)**

**Description:**

The system reviews customer contact reminders.

[**2.**](#BPM1)**0 Create To Do**

A**ctor/Role: CCS(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:**

|  |
| --- |
| To Do Role |
| To Do Type |
| Batch Scheduler - Feature Configuration |
| Batch Control |

**Customizable process N Process Name:**

|  |
| --- |
| TD-CCCB - To Do for Customer Contact |

[**2.**](#BPM1)**1 Resolve Reminder**

A**ctor/Role: CSR or Authorized User**

**Description:**

CSR or Authorized User resolves logged reminder.

[**2.**](#BPM1)**2 Generate Customer Contact**

A**ctor/Role: CCS(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 |
| 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 |

**Business Object Y Business Object:**

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

**Process Scripts**  **Scripts:**

|  |
| --- |
| 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 |
| C1-ExpCardLe - Activity Request - Auto Pay Expiring Credit Card Notice |
| C2M-AdjFrCC - Create CC on adjustment freeze (used on NSF adjustment type) |

**Customizable Process Process Name:**

|  |
| --- |
| DEPRVW – Deposit Review Batch Job |

[**2.**](#BPM1)**3 Display / Print Letter**

A**ctor/Role: CCS(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.**](#BPM1)**4 Print and Dispatch Letter**

A**ctor/Role: CSR or Authorized User**

**Description:**

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

[**2.**](#BPM1)**5 Receive Letter**

A**ctor/Role: Customer**

**Description:**

Customer receives generated letter.

[**2.**](#BPM1)**6 Extract Letters**

A**ctor/Role: CCS(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 |
| 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 |

**Configuration required N Entities to Configure:**

|  |
| --- |
| Collection Event Type |
| Severance Event Type |
| Write Off Event Type |
| Letter Template |

**Customizable process Y Process Name:**

|  |
| --- |
| LTRPRT - Letter Extract |

[**2.**](#BPM1)**7 Print and Send Letter**

A**ctor/Role: Document Management System**

**Description:**

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

[**2.8**](#BPM1) **Generate Request Phone**

A**ctor/Role: CCS(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**](#BPM1) **Dial Phone**

A**ctor/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.**](#BPM1)**0 Receive Call**

A**ctor/Role: Customer**

**Description:**

The customer receives a call from the company.

[**3.1**](#BPM1) **Create and Send SMS Group: 3.4.1.2 Manage Notifications**

A**ctor/Role: CCS(CCB)**

**Description:**

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

[**3.2**](#BPM1) **Dispatch Message Group: 3.4.1.2 Manage Notifications**

A**ctor/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.**](#BPM1)**3 Receive Message Group: 3.4.1.2 Manage Notifications**

A**ctor/Role: Customer**

**Description:**

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

[**3.**](#BPM1)**4 Create and Send Email Group: 3.4.1.2 Manage Notifications**

A**ctor/Role: CCS(CCB)**

**Description:**

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

[**3.**](#BPM1)**2 Receive Email Group: 3.4.1.2 Manage Notifications**

A**ctor/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-CCS-3411-001-Create-Existing-Person-Or-Business-Customer-Contact | 4 |
| 2 | URM-CCS-3411-002-Create-Existing-Person-Or-Business-Customer-Contact-With-Reminder | 4 |
| 3 | URM-CCS-3411-003-Create-Existing-Premise-Customer-Contact | 2 |
| 4 | URM-CCS-3411-004-Create-Existing-Premise-Customer-Contact-With-Reminder | 2 |

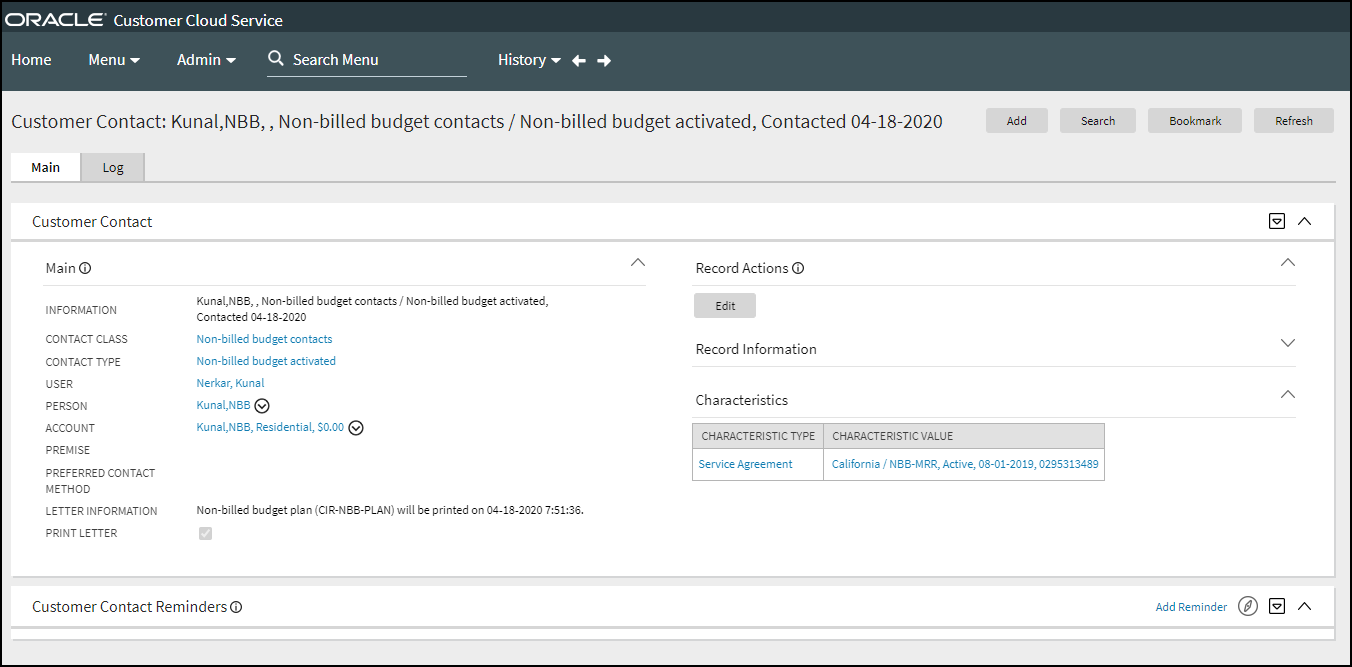
## Document Control

**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 |
| 06/27/2024 | Kunal Nerkar |  | Updated Document and Visio for CCS 24B |
| 07/26/2024 | Line Prado |  | Reviewed |
| 12/21/2024 | Galina Polonsky |  | Reviewed, Approved |

## Attachments

### Customer Contact Page



### Customer Contact Log Entry Page

