**CCS**

**24B**

**3.4.2.1** **Maintain Customer Profile**

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1. To update the table of contents, put the cursor anywhere in the table and press [F9]. To change the number of levels displayed, select the menu option Insert‑>Index and Tables, make sure the Table of Contents tab is active, and change the Number of Levels to a new value.

## Brief Description

**Business Process: 3.4.2.1 CCS.Maintain Customer Profile**

**Process Type:**  **Sub-Process**

**Parent Process: 3.4.3 CCS.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**](#_Business_Process_Model) **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**](#_Business_Process_Model) **Request Update Customer Information**

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

**Description:**

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

[**1.2**](#_Business_Process_Model) **3.3.1.1 CCS.Establish Person and or Account**

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

**Description:**

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

[**1.3**](#_Business_Process_Model) **Update Account Information**

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

**Description:**

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

[**1.4**](#_Business_Process_Model) **Enter auto-pay**

A**ctor/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 CCS.Manage Auto-Payments

[**1.5**](#_Business_Process_Model) **4.3.1.1b CC&B.Manage Auto-Payment**

A**ctor/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 CCS.Manage Auto-Payments

[**1.**](#_Business_Process_Model)**6 Enter Credit or Cash-Only Score Information**

A**ctor/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 CCS.Manage Customer Risk.

[**1.7**](#_Business_Process_Model) **3.4.2.2 CCS.Manage Customer Risk**

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

**Description:**

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

[**1.8**](#_Business_Process_Model) **Enter Budget Information**

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

**Description:**

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

[**1.9**](#_Business_Process_Model) **3.4.4.1a** **CCS.Enroll in Budget**

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

**Description:**

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

[**2.0**](#_Business_Process_Model) **Initiate Cancel Budget**

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

**Description:**

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

[**2.1**](#_Business_Process_Model) **3.4.4.3a CCS.Cancel Budget**

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

**Description:**

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

[**2.2**](#_Business_Process_Model) **Enter Customer Deposit**

A**ctor/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 CCS.Determine Customer Deposit (Cash, Non-cash, 3rd party).

[**2.3**](#_Business_Process_Model) **3.3.3.2 CCS.Determine Customer Deposit, (Cash, Non-cash, 3rd party)**

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

**Description:**

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

[**2.4**](#_Business_Process_Model) **CCS.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 CCS.Manage Customer Contacts.

[**2.5**](#_Business_Process_Model_1) **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**](#_Business_Process_Model_1) **Request Update Service Information**

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

**Description:**

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

[**2.7**](#_Business_Process_Model_1) **3.3.2.1 CCS.Start Premise Based Service**

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

**Description:**

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

[**2.8**](#_Business_Process_Model_1) **Update Premise Information 5.1.5.1 CCS.Manage Metered Site**

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

**Description:**

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

[**2.9**](#_Business_Process_Model_1) **Update Service Agreement**

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

**Description:**

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

[**3.0**](#_Business_Process_Model_2) **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**](#_Business_Process_Model_2) **Request Update Service Information**

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

**Description:**

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

[**3.2**](#_Business_Process_Model_2) **3.3.2.1 CCS.Start Non-Premise Based Service**

A**ctor/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 CCS.Start Non-Premise Based Service.

[**3.3**](#_Business_Process_Model_1) **Update Service Information**

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

**Description:**

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

[**3.4**](#_Business_Process_Model_1) **Update Service Agreement**

A**ctor/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 |
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## Document Control

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1

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## Attachments