Oracle Fusion Customer Experience for Utilities

Sales User Guide

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1

About This Guide

If you're looking for information about how your key account managers can perform day-to-day tasks in your CX for Utilities applications, then this guide is for you. The information is primarily aimed at employees and managers who are responsible for sales and service tasks associated with key accounts at a utility company.

This guide describes how to:

- Access CX for Utilities Sales
- Use the Business List to:
  - Search for key accounts
  - Access primary contact information
  - Create a new account
  - Manage account records
  - Access Account 360
- Use Account 360 to:
  - View and manage billing account contacts
  - Manage outage data
  - View the account hierarchy
  - View premise and service details
  - Perform and manage needs analysis
  - View account insights, and activities
  - View billing information
  - View usage information
  - View service requests
  - View and manage leads and opportunities
  - View account hierarchy data
  - Export data
  - View premise and service details
  - Perform a needs analysis
- View utility data in Redwood Sales

CX for Utilities Sales requires integration with one or more of the following systems:

- Oracle Sales
- Oracle Service
- Oracle Utilities Customer Cloud Service or Oracle Utilities Customer to Meter

Additionally, several features discussed in this guide are shared between CX for Utilities Sales and CX for Utilities Agent Service.

Also in this section:

- Accessing Documentation for Integrated Systems

Accessing Documentation for Integrated Systems

The Oracle Customer Experience for Utilities solutions integrate with a number of other Oracle products. This guide provides details about features and functions that are within the Customer Experience for Utilities (CX4U) systems.

To find additional information about the systems that integrate with CX4U, you can use the resources listed below.

> **Note**
>
> Different products provide different types of documentation. If you can't find what you're looking for using the links below, use the search bar at the top of the system-specific pages to search the available content on Oracle Help Center.

System	Documentation Links
Oracle Customer Experience for Utilities	The features described in this guide must be set up and configured during the implementation process. Additionally, some of the features discussed in this guide are shared between CX for Utilities Agent Service and CX for Utilities Sales. For information regarding the features available in each solution, and details related to the implementation of these features and solutions, see the Customer Experience for Utilities Help Center.
Oracle Utilities Customer Cloud Service	See Oracle Utilities Customer Cloud Service Help Center
Oracle Utilities Customer to Meter	See Oracle Utilities Customer to Meter Help Center
Oracle Utilities Upgrade Policy	Review the Upgrade Policy to verify that systems are upgraded to the appropriate release and maintenance levels to support all features and functionality. For additional information, see My Oracle Support Document 2876281My Oracle Support Document 2876281.
Oracle Fusion CX for Industries Framework	See Document KB166238 in My Oracle Support. Access to this document requires a valid log in.
Oracle Fusion Service, which includes: • Service Requests • Knowledge Management • Computer Telephony Integration (CTI) • Email Channels	See Oracle Fusion Service Help Center
Oracle Sales, which includes: • Contacts • Accounts • Leads • Opportunities • Activities	See these resources: • Oracle Sales Help Center • Oracle Sales Questions and Answers • Oracle Sales Playbooks
Oracle Fusion Applications (Common)	See Oracle Fusion Applications Books

System	Documentation Links
Oracle Fusion Middleware	See Oracle Fusion Middleware Help Center
Oracle Visual Builder	See Oracle Visual Builder Studio Help Center

2 CX for Utilities Sales Overview

CX for Utilities Sales simplifies standard work processes for account managers at a utility company by providing a variety of tools that reduce the cost-to-serve, provide elevated customer service, and enable an efficient sales cycle. This solution integrates the Oracle Redwood Sales and Oracle Fusion Service applications with these Oracle Utilities customer information systems:

- Oracle Utilities Customer Cloud Service
- Oracle Utilities Customer to Meter

The core capabilities of CX for Utilities Sales include:

- View and access current and potential key accounts using the Business List.
- Use Account 360 to manage key accounts, which includes:
  - Account header, which you use to:
    - View account contacts.
    - Update and manage account details.
    - Mark an account as a favorite.
    - Create service requests, leads, opportunities, notes, appointments, and tasks, and send emails.
    - Search for and select billing accounts.
    - Access account hierarchy.
  - Billing account contact management, which includes:
    - Linking contacts to billing accounts
    - Setting communication preferences
    - Setting billing preferences
  - Outage management
  - Account Hierarchy, which you use to view relationships and compare data between parent and child accounts.
  - Premise and Service Details page, which you use to view a hierarchical list of the details associated with a selected billing account.
  - Needs Analysis Dashboard, which you use to:
    - Launch a needs analysis interview.
    - Complete an in-progress interview.
  - Overview tab, which you use to:
    - View account insights.
    - View and manage account debt.
    - View pending and recently completed tasks for an account.
  - Billing tab, which you use to:

        * View aggregate billing data for all child accounts.
        * Compare billing data for up to 20 billing accounts.
        * View billing and financial history for billing accounts.
        * Export data to CSV and Excel formats.
        * Answer common customer questions, such as:
            * What is my balance?
            * When will my next bill be generated?
            * Are payments being made on time?
            * How much have I been billed over the last 12 months?
    - Usage tab, which you use to:
        * Compare usage data for up to 20 billing accounts.
        * View the Usage Map for a selected billing account.
        * Access usage history by year, bill period, and day.
        * Export data to CSV and Excel formats.
    - Service tab, which you use to:
        * Access resolved and unresolved service requests for an account.
        * Access Oracle Service Center, where you can modify the details of a service request.
    - Leads and Opportunities tab, which you use to:
        * View all of the leads and opportunities associated with an account.
        * Access all leads and opportunities in Oracle Redwood Sales, where you can perform additional tasks.

> **Note**
>
> Several features discussed in this guide are shared between CX for Utilities Agent Service and CX for Utilities Sales. These experiences, which are both part of the Oracle Customer Experience for Utilities solution, can be used together to provide a robust set of features for your utility sales and service employees. Documentation for all features in these experiences can be found in the Oracle Customer Experience for Utilities Help Center.

Additional capabilities that are shared between CX for Utilities Agent Service and CX for Utilities Sales include:

- Use the Work Queue to manage service requests and to do tasks.
- Use the Knowledge Management tab to search for and view articles in the Knowledge Management system that can help answer your customer's questions.
- Use call features to set your availability and receive inbound calls.

Here are some examples of common journeys a key account manager might take:

Table 2-1 CX for Utilities Sales Journeys

User Journey	For More Information
The key account manager receives a call from the accounting department of an existing customer. They have concerns about their latest bill. The key account manager uses the Business List to locate the account and opens Account 360. Using the Billing Account Comparison chart, the key account manager identifies one billing account that has a much higher balance than the others. The key account manager can then view the financial history associated with that billing account to determine what the issue is.	See these topics: • Using the Business List • Using Account 360 • Using the Billing Tab
The key account manager is preparing to meet with one of their customers and needs to provide them with a summary of their bills over the last year. The key account manager uses the Business List to locate the account and opens Account 360. The key account manager exports the Billing Account Comparison chart as a PDF to print and share during their meeting.	See these topics: • Using the Business List • Using Account 360 • Exporting Billing Data
The key account manager recently learned that their account plans to open 10 new warehouses in the state of California in the next 5 years. The key account manager uses the Business List to locate the account and opens Account 360. The key account manager navigates to the Usage tab and selects the accounts located in California to build a usage comparison chart. The key account manager analyzes the usage of these billing accounts to forecast the impact to the utility's grid.	See these topics: • Using the Business List • Using Account 360 • Using the Usage Tab
The key account manager is in a meeting with multiple stakeholders from their account and someone mentions that the utility crew that recently changed meters damaged the property. The key account manager uses the Business List to locate the account and opens Account 360. The key account manager navigates to the Service tab and doesn't see any service requests related to this issue. The key account manager creates a service request to ensure that they follow-up with the customer and repair or reimburse the damage.	See these topics: • Using the Business List • Using Account 360 • Using the Service Tab
A new key account manager is getting up-to-speed on an account. The key account manager uses the Business List to locate the account and opens Account 360. While reviewing billing accounts, the key account manager sees that one of the billing accounts has many premises by way of the premise indicator badge. The key account manager opens this billing account and selects the Premise and Service Details page. The key account manager expands the premise tree to learn more about the contracts, service points, devices, and components associated with the account.	See these topics: • Using the Business List • Using Account 360 • Viewing Premise and Service Details

Topics in this chapter include:

- Get to Know the UI and Features

Get to Know the UI and Features

Understanding the features and main areas of the interface helps you as you work within CX for Utilities Sales. The main areas to be aware of include:

Business List

The main features of the Business List include:

- The Business List provides you with a list of all accounts you can view. You can choose to view:
  - My Accounts
  - Favorite Accounts
  - All Accounts
- Search for accounts by name, primary address, contact information, industry, billing account ID, or premise address to easily access a specific account.
- Access Account 360.

Account 360

The main features of Account 360 include:

- View basic account information in the Account header, such as the primary contact and primary address.
- View and manage contacts associated with the account and the associated billing accounts.
- View the Oracle Fusion account details.
- View the account team.
- Mark an account as a favorite by clicking the heart next to the account name.
- Manage outage data.
- View the account hierarchy.
- Perform and manage needs analysis.
- View account insights.
- View and manage account debt.
- View and manage activities and tasks.
- View and compare billing information for selected billing accounts.
- View and compare usage information for selected billing accounts.
- View resolved and unresolved service requests.
- View and manage sales leads and opportunities.

Work Queue

The main features of the Work Queue include:

- The Work Queue provides easy access to all service request and to do tasks to which the agent or key account manager has access. The items that are displayed in the Work

Queue are based on the user's security group and the configurations that are defined during implementation of the Oracle Fusion Service and Oracle Utilities systems.

- Search for and sort service requests and to do tasks using filters and sort options.
- Identify high-priority items that need your attention, and work on outstanding service requests and to do tasks.
- Assign service requests and to do tasks to yourself.

Knowledge Management

The Knowledge Management page tab provides you with easy access to Knowledge Management features, which enable you to access and manage articles that can help you answer customer questions. Customer service agents and key account managers are able to access all published articles from the interface.

For information about using the Knowledge Management system, see the Use My Knowledge topic in the Oracle Fusion Service library, which is available in the Oracle Help Center.

Call Features and Computer Telephony Integration (CTI)

The main call features include:

- If your solution is set up to use Oracle's CTI features, utility employees can manage their phone status, answer phone calls, and enter wrap up and call resolution notes directly from the interface.
- Call feature integration is used in both CX for Utilities Agent Service and CX for Utilities Sales. For information about using call features, see Use Call Features.

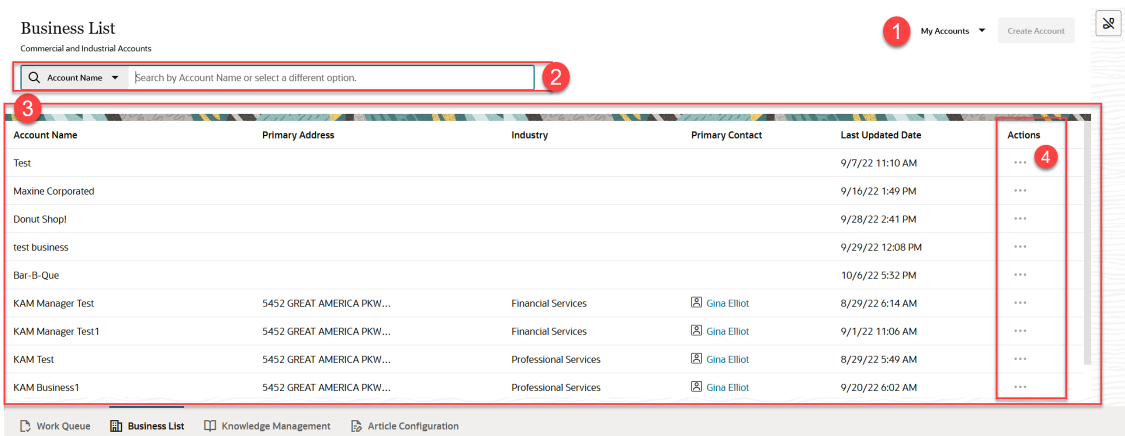
3
Accessing CX for Utilities Sales

When you log into CX for Utilities Sales, you are brought to the Business List page tab by default. System administrators can change the default landing tab by role or by user as needed, using profile options.

The page tabs that are displayed at the bottom of the screen are also determined by your user role.

This image shows an example of the Business List page tab, and identifies some of the main areas:

Figure 3-1 Business List Areas



This table discusses the main areas of the screen:

Table 3-1 Main Areas of the Screen

Page Area	Description
1. Oracle Global Header	This is the standard Oracle Global Header. You use this header to: • Access other Oracle Fusion systems and applications. • Log in and out. • Access your Oracle Fusion home page. • Access and edit your profile. Manage notifications. For additional information on using the Oracle header, see the Get Started chapter of the Using Common Features Guide, available in the [Oracle Help Center]().

Table 3-1 (Cont.) Main Areas of the Screen

Page Area	Description
2. Search Bar	Use the search bar to locate the accounts you want to view and manage. Search bars appear at the top of most of the page tabs.
3. Work Area	This portion of the screen is the work area, and it changes depending on which page tab you select and which task you are completing. Use this section of the screen to select and manage records.
4. Page Tab Area	This portion of the screen displays the different page tab options that are available to you. They include: • Work Queue • Business List • Knowledge Management **Note** The Work Queue and Knowledge Management page tabs are used in both CX for Utilities Agent Service and CX for Utilities Sales. Additional page tabs, such as the Person and Premise Search, might also be available if your organization uses both CX for Utilities Agent Service and CX for Utilities Sales, and you are assigned to multiple user roles. For information about the page tabs that belong to CX for Utilities Agent Service, see Using CX for Utilities Agent Service.

Topics in this chapter include:

- Access CX for Utilities Sales

Access CX for Utilities Sales

To access the features of CX for Utilities Sales, you start from the Oracle Fusion Home Page. All roles use the same process to log in, but the system displays different tabs depending on the roles assigned to the logged-in user.

> **Note**
>
> Contact your manager to receive log in information for the Oracle Fusion Home Page.

Accessing the Solution

To access the solution:

1. From the Oracle Fusion Home Page, click the menu button at the top left of the screen.
2. Select Redwood Sales or Service, and then click the Utility Accounts button. The availability of this button under the Sales and Service menu options is based on your user role, as follows:
   - The Utility Accounts button is available under the Redwood Sales menu for KAM Sales, KAM Sales Supervisors, and KAM Administrator roles.
   - The Utility Accounts button is available under the Service menu for KAM Service, KAM Service Supervisors, and KAM Administrator roles.
3. By default, the system displays the Business List page tab. System administrators can change the default landing tab by role or by user as needed, using profile options.

4

Using the Business List

The Business List is your main screen to find and manage your key accounts. You use the Business List to:

- View your assigned accounts, favorite accounts, or all accounts
- Search for specific accounts
- Access key account data in Account 360
- Create a new account

The Business List has multiple views that you can choose from to search for and display Oracle Fusion account records, which include:

- **My Accounts:** This view is displayed by default when you access the Business List, and the records that appear in the work area include the following, depending on the role of the logged in user:
  - Non-manager roles must be assigned to the sales team and/or sales territory for an account in the Oracle Sales system in order for it to display.
  - Supervisors will see all of the accounts for which they are designated as the owner in Oracle Sales, and also all of the accounts that would display for the employees who report to them.
- **Favorites:** This view displays all Oracle Fusion accounts that the logged-in user has marked as a favorite.
- **All accounts:** This view displays all Oracle Fusion accounts that the logged-in user has access to.
- **Customized saved account searches:** You can define customized searches in the Oracle Fusion Sales system and they will appear in this drop down so you can quickly search for the accounts that you access often. For additional information, see Overview of Saved Search Setup in the Oracle Sales Help Center.

The records that display in the business list can be:

- **Customers:** These records represent Oracle Fusion accounts that are associated with one or more utility billing accounts. These can be parent or child accounts.
- **Prospects:** These records represent businesses that exist as Oracle Fusion accounts, but are not connected to any utility billing accounts.

Once you have located the record you want to view or manage, you can use the Business List to:

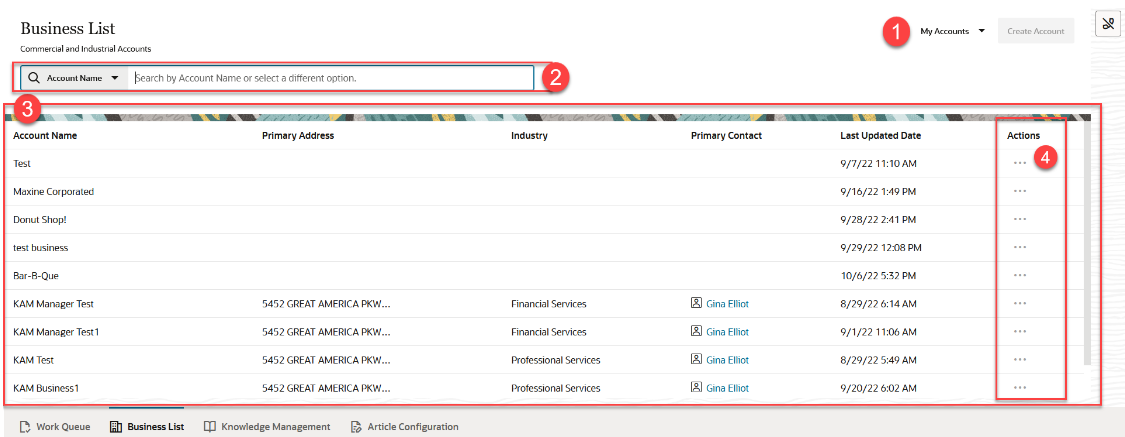
- View the primary contact information for the account
- Access the Oracle Fusion Contact page for the primary contact
- Use the Action menu options to:
  - Create a contact
  - Create a service request
  - Create a lead

- Create an opportunity
- Mark an account as a favorite
- Create a note
- Create an appointment
- Create a task Log a call
- Send an email

- Access Account 360 to manage data and transactions

This image identifies the main areas of the Business List screen:

Figure 4-1 Business List



This table describes the main areas that appear on the Business List screen:

Table 4-1 Business List Areas

Page Area	Description
1. Header Actions	Use the **Account View** button to specify which accounts you want to view. You can choose: • My Accounts (default) • Favorite Accounts • All Accounts • Customized saved searches you created in the Oracle Sales system. **Note** The selection you choose here works in conjunction with the text you enter in the search bar. For example, if you select My Accounts, and then search for a business name, it will appear in your search results only if the account is assigned to you. Use the **Create Account** button to create a new Oracle Fusion account record. Clicking this button opens a Redwood Sales Create Account drawer on the right side of the screen. After you create the record, the drawer closes and brings you to an additional screen where you can mark the contact as the primary contact for the account. Close the drawer to return to the Business List.

2. Search Bar	Use the options in this section of the form to search for the account you want to view. You can search by:
	• Account name
	• Primary address
	• Contact information, which includes:
	  – Name
	  – Address
	  – Phone number
	  – Email
	• Industry
	• Billing account ID
	• Premise address

Table 4-1 (Cont.) Business List Areas

Page Area	Description
3. Detail Area	This section of the form displays your search results. Each record contains the following information from the Oracle Fusion account: • Account Name • Primary Address • Industry • Primary Contact • Last Updated Date You can perform the following actions on each record: • Hover over the Primary Contact icon to view contact details. • Click the Primary Contact hyperlink to access the Oracle Fusion Contact page. • Click on the record to access Account 360.

Table 4-1 (Cont.) Business List Areas

Page Area	Description
4. Action Menu	You can use the Action menu that appears on each record in the Business List to: • **Create Contact:** This option enables you to create a new contact associated with the selected account. • **Create Service Request:** This option enables you to create a new service request associated with the selected account. • **Create Lead:** This option enables you to create a new sales lead associated with the selected account. • **Create Opportunity:** This option enables you to create a new sales opportunity associated with the selected account. • **Add to Favorites:** This option enables you to specify that this account is a favorite, and should display when you use the Favorites view. • **Create Note:** This option enables you to create a new note activity associated with the selected account. • **Create Appointment:** This option enables you to create a new appointment activity associated with the selected account. • **Create Task:** This option enables you to create a new task activity associated with the selected account. • **Log a Call:** This option enables you to log the details about a phone call you had with the selected account. • **Create Email:** This option enables you to create a new email activity associated with the selected account. When you select any of these action menu items other than the Add to Favorites, a drawer opens on the right side of the screen and displays the appropriate screen from the Oracle Redwood Sales system. When you are done creating the record, the system closes the drawer and either returns you to the Business List, or brings you to the new record you have created.

Topics in this chapter include:

- Searching for Key Accounts
- Accessing Primary Contact Information
- Creating an Account from the Business List
- Managing Account Records Using Business List Actions
- Accessing Account 360

Searching for Key Accounts

When you have questions, issues, or tasks that need to be completed for an account, you can search for that account in the Business List so you can access necessary account information.

Search for Key Accounts

To search for account records:

1. Access CX for Utilities Sales.
2. Select the Business List page tab.
3. Select one of these options at the top of the screen to specify which accounts you want to search for:
   - **My Accounts:** This view is displayed by default when you access the Business List, and the records that appear in the work area will include the following, depending on the role of the logged in user:
     – Non-manager roles will see only the accounts for which they are designated as the owner.
     – Supervisors will see all of the accounts for which are designated as the owner and all of the accounts owned by the employees who report to them.
   - **Favorites:** This view displays all accounts that the logged-in user has marked as a favorite.
   - **All Accounts:** This view displays all Oracle Fusion accounts.
   - **Customized saved search:** You can select from any number of saved searches you created in the Oracle Sales system. Use one of these searches to quickly search for accounts you view frequently. For additional information, see Overview of Saved Search Setup in the Oracle Sales Help Center.
4. In the search field, select one of the following:
   - Account name
   - Primary Address
   - Contact information If you use this option, you must also select a sub type, which includes name, address, phone number, or email.
   - Industry
   - Billing account ID
   - Premise address
5. Enter your search text in the search bar, and then hit Enter. Be aware that the text you enter in the search bar works in conjunction with the view you have selected. For example, if you select My Accounts, and then search for a business name, it will appear in your search results only if the account is assigned to you.
6. Notice that the search bar now contains your search term.
7. To remove search criteria from your search, click the X at the end of the search bar.
8. When you have found the account you want to view or update, continue to one of these tasks:
   - Access contact information
   - Access Account 360

Accessing Primary Contact Information

When you need to speak with a representative from an account, you need to know who the primary contact for the account is, and how to contact them. To use these steps to access contact information, the contact must be marked as the primary contact on a key account.

Access Primary Contact Information

To access primary contact information:

1. Search for the account you want to view.
2. In the search results area, you can hover over the primary contact to view contact details.
3. To access additional information about the contact, click on the contact name to access the Oracle Fusion Contact record.
4. For information about updating contacts, search for your topic in the Oracle Sales Help Center.

Creating an Account from the Business List

Using the Create Account button on the Business List, you can create a new Oracle Fusion account record. When you click this button, the Create Account drawer opens on the right side of the screen, and enables you to quickly create a new account in the Oracle Redwood Sales system.

For additional information about managing Oracle Fusion accounts, search for your topics in the Oracle Sales Help Center.

Create an Account

To create a new account from the Business List:

1. Access the Business List and click the **Create Account** button.
2. The system opens the Create Account drawer from the Oracle Redwood Sales system on the right side of the screen.
3. Complete the account details and click **Create**.
4. The drawer closes and navigates you to Account 360 for your new record.
5. Click the **Business List** link at the top right to return to the Business List.

Managing Account Records Using Business List Actions

When managing existing accounts, you often need to associate additional records with the account, such as contacts, leads, service requests, or appointments. To add additional records to an existing account, such as an appointment or a service request, you can search for the account you want to manage in the Business List, and then choose from a list of action menu items, which include:

- **Create Contact:** This option enables you to create a new contact associated with the selected account.
- **Create Service Request:** This option enables you to create a new service request associated with the selected account.

- **Create Lead:** This option enables you to create a new sales lead associated with the selected account.
- **Create Opportunity:** This option enables you to create a new sales opportunity associated with the selected account.
- **Create Note:** This option enables you to create a new note activity associated with the selected account.
- **Create Appointment:** This option enables you to create a new appointment activity associated with the selected account.
- **Add to Favorites/Remove from Favorites:** This option enables you to mark an account as a favorite, or remove it from your list of favorite accounts. When marked as a favorite, the option reads Remove from Favorites. When not marked as a favorite, the option reads Add to Favorites, and the account is then viewable when you use the Favorites option on the Business List.
- **Create Task:** This option enables you to create a new task activity associated with the selected account.
- **Log a Call:** This option enables you to log the details of a call you had with the selected account.
- **Send Email:** This option enables you to create and send a new email activity associated with the selected account.

When you select any of these action menu items (except for the Favorites options), a drawer opens and displays the appropriate screen from the Oracle Redwood Sales or Oracle Fusion Service system. When you are done creating the record, the drawer closes and returns you to the Business List, or brings you to the newly created record.

For additional information about managing Oracle Fusion accounts, including how to create contacts, leads, opportunities, and activities, see the Oracle Sales Help Center.

Additionally, see the Using the Service Center in the Redwood Experience Guide for information about working with service requests.

Perform Account-Related Actions

To perform account-related actions from the Action menu:

1. Search for your account.
2. On the right side of the screen, click the **Actions** menu for the record you want to update, and then select one of these options:
   - Create Contact
   - Create Service Request
   - Create Lead
   - Create Opportunity
   - Add to Favorites
   - Remove from Favorites
   - Create Note
   - Create Appointment
   - Create Task
   - Send Email

3. The system opens the associated screen from the Oracle Redwood Sales or Oracle Fusion Service system in a drawer. Be aware that this step, and the remaining steps in this task, are not applicable for the Add to/Remove from Favorites option.
4. Create your record as needed, and then click **Create**.
5. In most cases, the drawer closes and returns you to the Business List. However, there are exceptions, such as:
   - If you're creating a new contact, the system opens the Edit Contact drawer, where you can mark this contact as the primary contact for an existing account, and then click Save to return to the Business List.
   - If you're creating a lead, opportunity, or service request, the system navigates you to the newly created record where you can edit it.

Accessing Account 360

When an account manager has questions or issues they need to resolve for a key account, they can access detailed information about that account in Account 360. This information enables account managers to easily view and access the information they need to manage the account.

Access Account 360

To access Account 360:

1. Search for the account you want to view.
2. Click anywhere on the account record, other than the **Primary Contact** field.
3. The Account 360 page opens with your selected account.
4. The tab that is displayed by default depends on your assigned role. See Using Account 360 for additional information.

5

Using Account 360

You use Account 360 to manage your key utility accounts. Account 360 provides easy access to important information, transactions, and historical data associated with the account. You access Account 360 for key accounts by searching for and selecting an account from the Business List.

Account 360 is available for all Oracle Fusion account records, however, the information that is available in Account 360 varies depending on:

- Whether the account is linked to one or more utility billing accounts.
  For example, outage, billing and usage information is displayed only for accounts that are associated with one or more billing accounts.
- Whether you are viewing an Oracle Fusion account or you are viewing a specific billing account.
  For example, when viewing an Oracle Fusion account, you can compare billing information for multiple related billing accounts. When viewing a specific billing account, you see only the data associated with that billing account.

> **Note**
>
> Account 360 is displayed as a sub-view of the Oracle Redwood Sales Account record. To use Account 360, Oracle strongly recommends that you have a complete understanding of how to work with and manage account data in Redwood Sales. For additional information, see the Oracle Sales Help Center.
>
> Additionally, the date range available for viewing is determined by the **Historical Data Range** profile option, which is set by your utility during implementation. By default, you can view 3 years of historical data.

Account 360 for an Oracle Fusion Account

When viewing an Oracle Fusion account, you use Account 360 to complete these tasks:

- Use the account header to:
  - View account details
  - View the number of associated billing accounts
  - View the primary address and primary contact information
  - Add or remove an account from your favorites by clicking the heart next to the account name
  - Access smart actions from the Smart Action bar by typing in key words such as Create, Show, or Contact. The system returns a list of all smart actions that match your search. You can then select an option to perform the action. Examples of smart actions include:
    - Create Appointment, Lead, Opportunity, Note, Contact, etc.
    - Log a call

      * Send an email
      * Show Account Hierarchy, Contacts, Leads, Team, etc.
      * View the Work Queue
      * Select Billing Account
- Manage outage data
- Use the account hierarchy
- Export utility data for your customers
- Use the Overview tab to:
  - View account insights
  - View and manage account debt
  - View a list of current tasks and activities from Fusion Sales that are associated with the account
- Use the Billing tab to:
  - Select billing accounts to compare billing data
  - View billing highlights
  - View the Bill History chart
  - View financial history details
- Use the Usage tab to:
  - Select billing accounts to compare usage data
  - View a list of service contracts and see locations on a map
  - Search for and select service contracts to view service contract usage
- Use the Service tab to:
  - View service requests associated with the account
  - Add billing accounts to a service request
- Use the Leads and Opportunities tab to:
  - View the most current leads and opportunities
  - Access a lead or opportunity in Redwood Sales
  - Add billing accounts to a lead or opportunity
- Use tabs at the bottom of the screen to navigate to Oracle Fusion Sales pages.

Account 360 for a Billing Account

When viewing a billing account, use Account 360 to:

- Use the account header to:
  - View the number of premises or the premise address if there is only one premise
  - View the current balance of the billing account
  - View the service type associated with the account, or the number of service types if there are more than one
  - Use the Action menu to:
    * Create a lead

    * Create an opportunity
    * Create a service request
    * View the Work Queue
    * View the Needs Analysis Dashboard
- Manage billing account contacts
- Manage outage data
- Use the Account Hierarchy to view relationships and compare data between parent and child accounts
- Export utility data for your customers
- View premise and service details for a selected billing account
- Perform a needs analysis on a billing account
- Use the Overview tab to:
  – View account insights
  – View and manage account debt
  – View a list of current tasks and activities from your CIS that are associated with the billing account
- Use the Billing tab to:
  – View billing highlights
  – View the Bill History chart
  – View financial history details
- Use the Usage tab to:
  – View a list of service contracts and see locations on a map
  – Search for and select service contracts to view service contract usage
- Use the Service tab to:
  – View service requests associated with the account
  – Add billing accounts to a service request
- Use the Leads and Opportunities tab to:
  – View the most current leads and opportunities
  – Access a lead or opportunity in Redwood Sales
  – Add billing accounts to a lead or opportunity

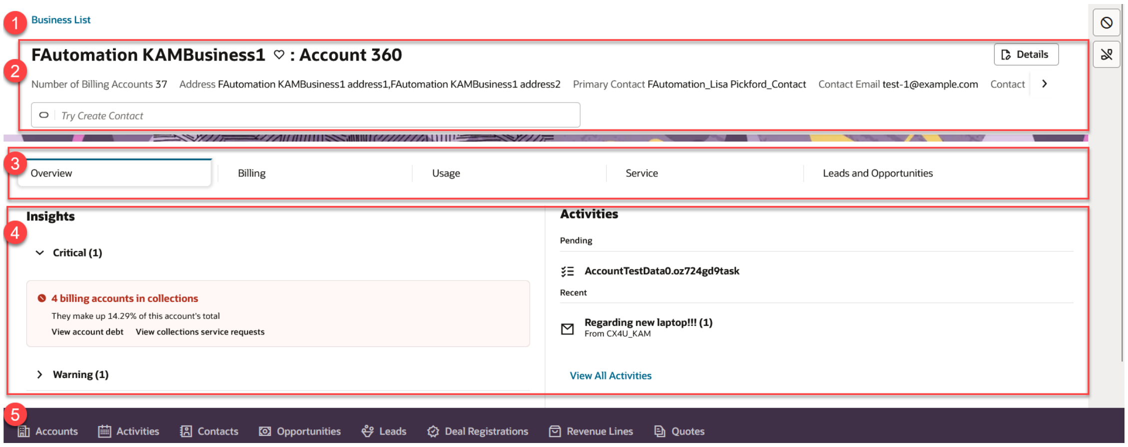
Navigating Account 360

As you navigate through the different tabs in Account 360, you can use the Smart Action bar (when viewing an Oracle Fusion account), action menus, and filters to find specific data or to display data for specified date ranges.

If you update a chart or table to display data for specific billing accounts and dates, and then you navigate to one of the billing accounts, when you return, the data displayed in Account 360 is retained. However, when you navigate away from Account 360 (for example, by returning to the Business List), the data is reset when you access Account 360 again.

This image identifies the main areas of the Account 360 screen:

Figure 5-1 Account 360 Areas



This table describes the main areas of Account 360:

Table 5-1 Account 360 Areas

Page Area	Description
1. Return to Business List Link	Use this option to return to the Business List. This link is available only when viewing an Oracle Fusion account.

2. Account Header	Use the account header area to view the following when you are in Account 360 for an Oracle Fusion account:
	• View account details
	• View the number of associated billing accounts
	• View the primary address and primary contact information
	• Add or remove an account from your favorites
	• Access smart actions from the Smart Action bar by typing in key words such as Create, Show, or Contact. The system returns a list of all smart actions that match your search. You can then select an option to perform the action. (When viewing an Oracle Fusion account)
	Use the account header area to view the following when you are in Account 360 for a billing account:
	• View the premise address or the number of premises associated with the billing account if there are more than one
	• View the current account balance
	• View the service type or number of service types if there are multiple
	• Use the Action menu to:
	  – Create a lead, opportunity, or service request for the billing account
	  – View the Work Queue
	  – View the Needs Analysis Dashboard
	• View premise and service details

Table 5-1 (Cont.) Account 360 Areas

Page Area	Description
3. Account Tabs	Use the tabs across the top of the Account 360 screen to view and manage different types of account information. By default, the Overview tab is displayed. When you click on a tab, the information in the work area changes.
4. Work Area	The work area is where you can view and manage account information. The information that displays in the work area depends upon: • The page tab or option that is selected • Whether you are viewing a Fusion account or billing accounts
5. Oracle Redwood Sales Navigation Options	If you are viewing an Oracle Fusion account, across the bottom of the screen you will see options that enable you to open, view, and manage additional sales-related information for your key account. These options are not available when viewing a billing account.

Topics in this chapter include:

- Using the Account 360 Header
- Managing Billing Account Contacts
- Managing Outages
- Using the Account Hierarchy
- Exporting Data from Account 360
- Viewing Premise and Service Details
- Using the Needs Analysis Dashboard
- Using the Overview Tab
- Using the Billing Tab
- Using the Usage Tab
- Using the Service Tab
- Using the Leads and Opportunities Tab

Using the Account 360 Header

You use the header section of Account 360 to view information about the account and to perform actions that are associated with the account. The header enables you to:

- View account details:
  - Use the View Details button to view and edit Oracle Fusion account details.
  - View the number of associated billing accounts in the header text.
  - View primary address and contact information in the header text.

- Add or remove an account from your favorites by clicking the heart next to the account name.
- Access smart actions from the Smart Action bar by typing in key words such as Create, Show, or Contact. The system returns a list of all smart actions that match your search. You can then select an option to perform the action. The Smart Action bar is available only when you are viewing an Oracle Fusion account in Account 360.
  Examples of smart actions include:
  - Create Appointment, Lead, Service Request, Note, Contact, etc.
  - Log a call
  - Send an email
  - Show Account Hierarchy
  - Show Contacts, Leads, Team, etc.
  - View the Work Queue
  - Select Billing Account
- Use the Action menu to perform additional actions for a billing account. This menu is only available when you are viewing a billing account in Account 360, and includes the following actions:
  - Create Lead
  - Create Opportunity
  - Create Service Request
  - View Work Queue
  - View Needs Analysis Dashboard

Topics in this section include:

- Using Smart Actions from Account 360
- Using Account 360 Action Menu Options

Using Smart Actions from Account 360

You use the header section of Account 360 to access the Smart Action bar. This bar is available only when you are viewing an Oracle Fusion account, and is not displayed when you are viewing a billing account. Smart actions allow you to access other forms to help you manage your key accounts. For example, you can use smart actions to:

- Create Service Request
- Create Lead
- Show Contacts
- Select Billing Account
- Show Account Hierarchy
- View Work Queue

The options that are available to you in the Smart Action bar are determined by your utility. Additionally, the utility can add or remove smart actions, and they can configure smart actions to determine their behavior. For example, some smart actions will open a drawer over the Account 360 screen, while other actions will navigate you to a new screen. To return to Account 360, save your work and close the drawer, or use your browser back button.

For more information on smart actions, see How do I switch to work areas powere by Adaptive Search? in the Oracle Sales Help Center.

Additionally, many smart actions open Oracle Redwood Sales or Service applications. For information about using Oracle Redwood Sales or Oracle Service applications, see:

- The Oracle Sales Help Center
- Using Service Center in the Redwood Experience Guide

The following topics provide some examples of how to use smart actions:

- Selecting a Billing Account from Account 360
- Viewing Account Contacts
- Creating a Service Request from Account 360
- Creating a New Lead
- Creating a New Opportunity
- Accessing the Account Hierarchy
- Accessing the Work Queue

Selecting a Billing Account from Account 360

You can use the Select Billing Account smart action from the Account 360 header to search for and select a billing account that is associated with the Oracle Fusion account you are viewing. When you select a billing account, the Account 360 view changes and displays data that is associated with only the selected billing account.

Select a Billing Account

To select a billing account to view:

1. From the Business list, access Account 360 for your account.
2. Enter **Select Billing Account** in the Smart Action bar, and click on the **Select Billing Account** option.
3. The Account 360 view changes to display only the data associated with the selected billing account, and the header of the form now displays the billing account ID.
4. To return to the Oracle Fusion account view of Account 360, use your browser back button.
5. To return to the Business List, click the **Business List** link at the top left of the screen.

Viewing Account Contacts

When you are dealing with large commercial or industrial accounts, there are typically multiple people at the company or organization that are listed as contacts. In addition to viewing the primary contact on the Account 360 header, you can use the Show Contacts option from the Smart Actions bar to see a complete list of all of the contacts associated with the account. When you select this option, the system displays the list of contacts in the Oracle Redwood Sales system.

See the Oracle Sales Help Center for additional information about working with account and contact records.

View Account Contacts

To view account contacts:

1. Access Account 360 for your account.
2. In the Smart Action bar, type, and then select **Show Contacts**.
3. The system opens the account contacts in the Oracle Redwood Sales system.
4. View and update the contact information as needed, and then save your changes.
5. Use your browser back button or click **Go to Overview** to return to Account 360.

Creating a Service Request from Account 360

You can create service requests from Account 360 in two ways:

- Use the Create Service Request option from the Smart Action bar to create a new service request for an Oracle Fusion account.
- Use the Create Service Request option from the Action menu to create a service request for a billing account.

When you create a service request, the system opens the Create Service Request drawer directly in Account 360, which you use to quickly generate a service request by completing a minimal number of fields. The values and options that are available in this drawer are determined by your Oracle Fusion Service settings. For additional information, see the following topics in the Oracle Fusion Service Help Center:

- How to Manage Smart Text Entries
- Service Request Categories
- Work Assignment and Routing

Create a Service Request

To create a service request from Account 360:

1. Access Account 360 for your account.
2. Use one of the following methods to continue:
   - To create a service request for a Fusion account, enter and then select **Create Service Request** in the Smart Action bar.
   - To create a service request for a billing account, first select your billing account, and then select **Create Service Request** from the Action menu.
3. The system opens the Create Service Request drawer.
4. Complete the following fields:
   - **Primary Contact:** Select a name from the list, or click the + button to create a new contact. If you create a new contact, the system brings you to the Oracle Redwood Sales system, where you can create and save a contact. After you save your new contact, you must click on the Primary Contact field again for the new contact to appear in the list. For information about using the Contact Page, see the Accounts and Contacts chapter in the Using Sales in the Redwood User Experience Guide.
   - **Title (Required):** Specify a title for the service request.
   - **Problem Description:** Specify the details related to the service request. Note that if your organization has implemented SmartText in the Fusion Service system, you can enter #<text> to find SmartText options to help you complete this field.
   - **Category:** Select a category or leave this field blank.
   - **Severity:** Select an option, or use the default value of Low.

- **Assign To:** Specify a person to assign to the request or leave this field blank.

5. Click Create at the bottom of the drawer.
6. The system opens the service request in Oracle Fusion Service, where you can add additional detail.
7. Save your changes and click your browser back button to return to Account 360.
8. For additional information about working with service requests, see "Service Requests" in the Using Service Center in the Redwood Experience Guide.

Creating a New Lead

You can use the Create Lead smart action to create new lead records for your account. After you create them, you edit and manage the leads from within the Oracle Redwood Sales system. The process for creating a lead varies slightly, depend on whether you're creating the lead for an Oracle Fusion account or for a billing account.

See the Oracle Sales Help Center for additional information about working with lead records.

Create a Lead for an Oracle Fusion Account

To create a new lead for an Oracle Fusion account:

1. Access Account 360 for your account.
2. In the Smart Action bar in the header, type and then select Create Lead.
3. The system opens the Create Lead drawer on the right of the screen.
4. Complete the following fields:
    - Primary Contact: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
    - Lead Name
    - Job Title
    - Account Name: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
    - Contact Phone
5. Specify the contact preferences related to calling the customer by selecting one of these options:
    - None (default)
    - Do not call
    - OK to call
6. Enter the contact email address, and then specify the preferences related to emails by selecting one of these options:
    - None (default)
    - Do not email
    - OK to email
7. Enter the remaining information as needed:
    - Source: Select an option from the available choices.

- Status: Select an option from the available choices. By default, the lead will be set to Unqualified.
- Owner
- Rank
- Country
- Address

8. Click Create.
9. The system opens the lead in Oracle Redwood Sales, where you can edit and update the record.
10. When you are done, save your changes and use your browser back button to return to Account 360.

Create a Lead for a Billing Account

To create a lead for a billing account:

1. Select a billing account from Account 360.
2. From the **Action** menu, type and then select **Create Lead**.
3. The system opens the Create Lead drawer on the right of the screen.
4. Complete the following fields:
   - Primary Contact: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Lead Name
   - Job Title
   - Account Name: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Contact Phone
5. Specify the contact preferences related to calling the customer by selecting one of these options:
   - None (default)
   - Do not call
   - OK to call
6. Enter the contact email address, and then specify the preferences related to emails by selecting one of these options:
   - None (default)
   - Do not email
   - OK to email
7. Enter the remaining information as needed:
   - Source: Select an option from the available choices.
   - Status: Select an option from the available choices. By default, the lead will be set to Unqualified.
   - Owner
   - Rank

- Country
- Address

8. Click **Create**.
9. The system opens the lead in Oracle Redwood Sales, where you can edit and update the record.
10. When you are done, save your changes and use your browser back button to return to Account 360.

Creating a New Opportunity

You can use the Create Opportunity smart action to create new opportunity records for your account. After you create them, you edit and manage the leads from within the Oracle Redwood Sales system. The process for creating an opportunity varies slightly depending on whether you are creating it at the Oracle Fusion account or the billing account level.

See the Oracle Sales Help Center for additional information about working with opportunity records.

Create an Opportunity for an Oracle Fusion Account

To create an opportunity for an Oracle Fusion account:

1. Access Account 360 for your account.
2. In the Smart Action bar in the header, type and then select **Create Opportunity**.
3. The system opens the Create Opportunity drawer on the right of the screen.
4. Complete the following fields:
   - Business Unit ID: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Name
   - Account: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Primary Contact: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Sales Method: This field is automatically populated based on your Redwood Sales settings, but you can select a different value from the drop down options.
   - Sales Stage: This field is automatically populated based on your Redwood Sales settings, but you can select a different value from the drop down options.
   - Win Probability
   - Close Date
   - Currency
5. Click **Create**.
6. The system opens the opportunity in Oracle Redwood Sales, where you can edit and update the record.
7. When you are done, save your changes and use your browser back button to return to Account 360.

Create an Opportunity for a Billing Account

To create an opportunity for a billing account:

1. Select a billing account from Account 360.
2. From the Action menu, type and then select **Create Opportunity**.
3. The system opens the Create Opportunity drawer on the right of the screen.
4. Complete the following fields:
   - Business Unit ID: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Name
   - Account: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Primary Contact: This field is automatically populated based on the account you are viewing, but you can select a different value from the drop down options.
   - Sales Method: This field is automatically populated based on your Redwood Sales settings, but you can select a different value from the drop down options.
   - Sales Stage: This field is automatically populated based on your Redwood Sales settings, but you can select a different value from the drop down options.
   - Win Probability
   - Close Date
   - Currency
5. Click **Create**.
6. The system opens the opportunity in Oracle Redwood Sales, where you can edit and update the record.
7. When you are done, save your changes and use your browser back button to return to Account 360.

Accessing the Account Hierarchy

When you are dealing with large commercial or industrial accounts, there are typically multiple accounts that are related. You can use the Show Account Hierarchy smart action to view parent and child accounts associated with the Oracle Fusion account you are viewing in Account 360.

Access the Account Hierarchy

To view the account hierarchy:

1. Access Account 360 for your account.
2. In the Smart Action bar, type and then select **Show Account Hierarchy**.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. For information about using the account hierarchy, see Using the Account Hierarchy.

Accessing the Work Queue

You use the Work Queue to search for, select, and manage service requests and to do tasks. The service requests that appear in your work list are from the Oracle Fusion Service system, and the to do tasks that appear are from your Oracle Utilities customer information system. You can use the View Work Queue smart action to view the Work Queue from Account 360.

View the Work Queue

To view the Work Queue:

1. Access Account 360 for your account.
2. In the Smart Action bar, type and then select **View Work Queue**.
3. The system opens the Work Queue.
4. For information about using the Work Queue, see Using the Work Queue.

Using Account 360 Action Menu Options

When viewing a billing account in Account 360, the Smart Action bar is not displayed. Instead, you use the Action menu to perform additional actions to help you manage your billing account. This menu is only available when you are viewing a billing account in Account 360, and includes the following actions:

- Create Lead
- Create Opportunity
- Create Service Request
- View Work Queue
- View Needs Analysis Dashboard

Creating Leads, Opportunities, and Service Requests

All of the "create" options open an Oracle Redwood Sales or Oracle Fusion Service drawer, where you can create your new record. When you finish creating the record, the system navigates you to the new record in either Redwood Sales or Fusion Service. There, you can add additional details to the record. When you are finished updating the record, save your changes and use the browser back button to return to Account 360.

View Work Queue

Use the View Work Queue option to open the Work Queue. The system navigates you to the Work Queue, where you can manage service requests and to do records. When you are finished, you can either access the Business List and search for your account, or you can use your browser back button to return to Account 360.

View the Needs Analysis Dashboard

This option navigates you to the Needs Analysis Dashboard, where you can manage your interviews. When you are finished, use your browser back button to return to Account 360.

Managing Billing Account Contacts

You can link contacts to individual billing accounts from Account 360. Once those contacts are linked to a billing account, you can then complete the following actions:

- Set communication preferences, which includes:
  – Adding and editing contact methods
  – Adding, editing and deactivating addresses
- Manage billing preferences

In this section:

- Linking a Contact with a Billing Account
- Setting Communication Preferences
- Managing Billing Preferences

Linking a Contact with a Billing Account

When working with billing accounts, it is helpful to have an understanding of who the key people are that are associated with the account. For example, you might want to know who is financially responsible for the account, or have a list of contacts you can reach out to in the event that the person you normally contact is not available. To accomplish this, you can link contacts to billing accounts.

When you link a contact to a billing account, you also define the communication preferences for that contact and billing account combination.

After you link contacts with billing accounts, you can also remove them from the billing accounts. For example, if a contact at one of your accounts leaves their job, you can remove them from the account's contact list.

> **Note**
>
> The person must already exist as a contact in Oracle Fusion to link them to a billing account.

You can link a contact to a billing account from these locations:

- Account 360
- My Contacts in Oracle Fusion Service
- An individual contact record in Oracle Fusion Service

Linking a Contact to a Billing Account

To link a contact to a billing account:

1. Complete one of these steps:
   - Access Account 360 for your account, and in the Action bar, type and select **Show Contacts**. Locate the contact you want to link to a billing account, and select **Edit Linked Billing Accounts** from the action menu at the right of the contact record.

- Navigate to the My Contacts screen in Oracle Fusion Service. Locate the contact you want to link to a billing account, and select **Edit Linked Billing Accounts** from the action menu at the right of the contact record.
- Navigate to the contact record in Oracle Fusion Service. Type **Edit Linked Billing Accounts** in the Action bar, and then select it.

2. The **<Contact Name> Billing Accounts Summary** screen opens, and displays one of the following:
   - A message telling you that the contact is not linked to any billing accounts for this account, along with a **Link Contact to Billing Account** button.
   - A list of the billing accounts associated with the selected account and contact. At the top right of the screen the **Link Contact to Billing Account** button is also displayed.
3. Click the **Link Contact to Billing Account** button, and then click **Continue** on the confirmation message.
4. If the contact doesn't already exist in your CIS, the system syncs the contact record so it is available in the CIS.
5. The **Select billing account** drawer opens.
6. Select the billing account you want to link the contact to and then click **Continue**.
7. Specify the **Relationship Type** and then click **Save and Continue**.
8. The system opens the **Communication preferences** drawer, where you can add or update contact preferences, address information, and notification preferences. See Setting Communication Preferences for additional details.
9. When you are done with your updates, save your changes and close the drawer.

Removing a Contact from a Billing Account

1. Complete one of these steps:
   - Access Account 360 for your account, and in the Action bar, type and select **Show Contacts**. Locate the contact you want to link to a billing account, and select **Edit Linked Billing Accounts** from the action menu at the right of the contact record.
   - Navigate to the My Contacts screen in Oracle Fusion Service. Locate the contact you want to link to a billing account, and select **Edit Linked Billing Accounts** from the action menu at the right of the contact record.
   - Navigate to the contact record in Oracle Fusion Service. Type **Edit Linked Billing Accounts** in the Action bar, and then select it.
2. The **<Contact Name> Billing Accounts Summary** screen opens, and displays a list of the billing accounts associated with the selected account and contact.
3. Click the Action menu next to the contact you want to remove, then click **Remove**.
4. On the confirmation message screen, click **Remove**.
5. The system displays a message when the removal is complete.

Setting Communication Preferences

When working with a billing account, you can access the communication preferences of the associated contacts so you can enable communications and edit, add, or delete contact methods, mailing addresses and notification preferences. You can access the communication preferences in two ways:

- From Account 360, use the Show Contacts smart action to view a list of contacts. On the contact you want to view, use the Edit linked billing accounts option to open the <Contact Name> Billing Account Summary page, which lists all billing accounts associated with the contact. Use the Update Communication Preferences option from the action menu on the billing account you want to update to access and manage the communication preferences.
- From Account 360, search for and select a billing account. Select View contacts from the action menu, which opens a drawer with a list of contacts. Use the Update Communication Preferences option from the action menu on the contact you want to update to access and manage the communication preferences.

The Set Communication Preferences screen includes the following sections:

- **Contact Methods:** Use this section of the screen to add new contact methods or edit and delete existing contact methods. Contact methods include items such as phone numbers and email addresses.
- **Mailing Address:** Use this section of the screen to enter and edit physical addresses where paper communications are delivered. These can include mailing, premise, and seasonal addresses.
- **Push Communication Preferences:** Use this section of the screen to enroll contacts in push communications, which are unscheduled notices the utility sends out. You can specify which contact methods to use for each communication type. You can also see if any related contacts are also enrolled in a push communication.
- **Subscription Communication Preferences:** Use this section of the screen to enroll contacts in utility subscription-based communications that notify them about updates associated with the utility or their account. You can specify which contact methods to use for each communication type.

> **Note**
>
> If the person is not set up to allow communications to be sent to them, you can't enroll them in push or subscription communications. You can enable communications for a person in your customer information system, or from Account 360. For information on allowing communications from your customer information system, see the topic "Account - Person Information" in the Business User Guide for your Oracle Utilities customer information system, available in the Oracle Utilities Help Center. For information on enable communications from Account 360 see Enabling Communications for a Contact.

In this section:

- Managing Contact Methods
- Managing Mailing Addresses
- Enabling Communications for a Contact
- Managing Communication Preferences

Managing Contact Methods

Each utility contact must have at least one contact method associated with their billing account. Contact methods can include:

- Phone numbers
- Email addresses

- Social networks
- Websites
- SMS (Short Message Service)
- Telex
- EDI (Electronic Data Interchange)
- Electronic file transfer

Utilities can determine which of these communication types is available in CX for Utilities Sales during the implementation and configuration process. Additionally, each contact method has types. For example, you can specify that a phone number is one of these types:

- Mobile phone
- Work phone
- Fax number
- Land phone

> **Note**
>
> Your utility can create additional phone types as needed.

When a communication method is added, the first record for a particular method is always marked as the primary contact method. For example, if the billing account has only one email address on file, that email address is marked as the primary email contact. If there are multiple records for a contact method, you can specify which of those records is the primary record. You cannot delete a primary contact method.

- Adding a Contact Method
- Editing Contact Methods

Adding a Contact Method

Each utility contact must have at least one contact method associated with their billing account.

To add a contact method:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary drawer, which lists all billing accounts associated with the contact. Select the **Update Communication Preferences** option from the action menu on the billing account you want to update.
   - Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Select the **Update Communication Preferences** option from the action menu on the contact you want to update.
2. The system opens the Set Communication Preferences drawer.
3. In the Contact Methods section, click the **+ Add Contact Method** button.
4. Select a value from the **Contact Method** field.
5. Enter the contact method details in the field(s) below the Contact Method field. The fields that appear here differ, depending on the contact method that you select. For example, if

you select Phone, you can then enter the phone type, country code, area code, phone number, and extension.

6. To mark the record as the primary contact method, click the **Primary** option. If the record you are adding is the only contact method of this type (for example, the only phone number record), the system automatically marks it as the primary contact method.
7. Click **Add** to save your changes.

Editing Contact Methods

After you create contact methods, you can edit or delete them.

To edit or delete a contact method:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary drawer, which lists all billing accounts associated with the contact. Select the **Update Communication Preferences** option from the action menu on the billing account you want to update.
   - Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Select the **Update Communication Preferences** option from the action menu on the contact you want to update.
2. The system opens the Set Communication Preferences drawer.
3. To edit an existing contact method record, in the Contact Methods section of the screen, click the **Edit** icon next to the record you want to edit. The system displays the contact method details. Edit them as necessary, and then click **Update**.
4. To delete a contact method record, click the **Delete** icon next to the record you want to delete, and then click **Continue** on the Delete contact method window. Be aware that you cannot delete a contact method record that is marked as a primary contact method.

Managing Mailing Addresses

You use the Mailing Address section of the form to specify physical addresses associated with the billing account. Addresses can include:

- **Premise address:** Can have only one designated premise address per billing account. If no additional mailing address is present, the premise address is used as the mailing address. Be aware that a billing account can have multiple service contracts, and therefore, multiple premises. Unless otherwise specified, the premise where service was most recently started is the designated premise address for the billing account.
- **Mailing address:** Can have only one overriding mailing address.
- **Seasonal address:** Can have multiple seasonal addresses, which are used as the mailing address between the specified start and end dates for that address. If there are multiple seasonal addresses, they cannot have overlapping date ranges.

You can enter multiple addresses in the communication preferences, and one of those records must be set as the primary address. The premise address is required and is set as the primary mailing address by default. You cannot edit or delete a premise address.

If the premise address is not where the caller wants their communications sent, you can enter a mailing address, and mark it as the primary address. All communications sent through the mail are sent to this primary address. You cannot delete an address that is marked as the primary address.

You can also identify one or more seasonal addresses. For example, a caller says they will be living in their lake house for the summer, and they want their paper communications sent to their lake house during June, July, and August. You can enter the lake house address as a seasonal address and specify the dates during which this address should be used as the primary mailing address. You can enter multiple seasonal addresses, but they cannot have overlapping date ranges. Seasonal addresses are automatically marked as the primary address during the time period they are active. In this example, the lake house address would automatically become the primary mailing address every year during June, July, and August.

- Adding a Mailing Address
- Edit, Delete or Deactivate an Address

Adding a Mailing Address

You can add multiple addresses to a customer or contact.

To add an address:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary drawer, which lists all billing accounts associated with the contact. Select the **Update Communication Preferences** option from the action menu on the billing account you want to update.
   - Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Select the **Update Communication Preferences** option from the action menu on the contact you want to update.
2. The system opens the Set Communication Preferences drawer.
3. In the Mailing Address section, click the **Add Address** button, and select one of the following options. Be aware that if a mailing address already exists, you will not have the option to add another mailing address.
   - Mailing address
   - Seasonal address
4. The Address Details section of the form opens. Complete these fields and then click **Add**:
   - Start Date: Date (seasonal address only)
   - Start Date: Month (seasonal address only)
   - End Date: Date (seasonal address only)
   - End Date: Month (seasonal address only)
   - Country/Region
   - Address Line 1
   - Address Line 2
   - City
   - State
   - Postal Code
5. To mark one of the addresses as the primary address, click the **Actions** menu on the address you want to select, and then select **Set as Primary**.

Edit, Delete or Deactivate an Address

After you add addresses to a customer or contact, you might need to edit, delete, or deactivate the address to ensure that the contact information is accurate.

To edit, delete, or deactivate an address:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary drawer, which lists all billing accounts associated with the contact. Select the **Update Communication Preferences** option from the action menu on the billing account you want to update.
   - Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Select the **Update Communication Preferences** option from the action menu on the contact you want to update.
2. The system opens the Set Communication Preferences drawer.
3. To edit an existing address, in the Mailing Address section of the screen, click the **Edit** icon next to the record you want to edit. The system displays the address details. Edit them as necessary, and then click **Update**.
4. To delete an address record, click the **Delete** icon next to the record you want to delete, and then click **Continue** on the Delete contact method window. Be aware that you cannot delete an address that is marked as a primary address unless it is a seasonal address, and another address exists.
5. To mark an address as active or inactive, click the **Action** menu on the record you want to delete, and then select **Make address active** or **Make address inactive**. Be aware that you cannot deactivate a primary address. Also, in some cases, making an address active will cause that address to be the primary address.

Enabling Communications for a Contact

A contact must be set up to allow communications to be sent to them in order for you to enroll them in push or subscription communications. You can enable communications for a person in your customer information system, or from Account 360.

For information on allowing communications from your customer information system, see the topic "Account - Person Information" in the Business User Guide for your Oracle Utilities customer information system, available in the Oracle Utilities Help Center.

> **Note**
>
> If you disable communications for a contact that is already enrolled in push or subscription communications, the system unenrolls the contact from all push and subscription communications automatically.

Enable Communications for a Contact

To enable communications for a contact from Account 360, complete these steps:

1. From Account 360, select the billing account you want to work with.
2. From the Action menu at the top of the screen, select **View Contacts**.

3. On the Linked contacts for <billing account> drawer, find the person you want to enable communications for, and select **Update Billing Preferences** from the actions menu on the far right of the contact record.
4. On the Billing preferences drawer, scroll down to the Notification Preferences section and select the **Allow communications** option.

> **Note**
>
> If you deselect this option, the contact can't enroll in push or subscription communications.

5. Click **Save**.

Managing Communication Preferences

You use these two sections of the form to specify whether the contact is notified about specific types of information, and if so, what contact method is used for the notification:

- **Push Communications Preferences:** Use this section of the screen to enroll contacts in push communications, which are unscheduled notices the utility sends out. You can specify which contact methods to use for each communication type. You can also see if other related contacts are receiving push communications.
- **Subscription Communications Preferences:** Use this section of the screen to enroll contacts in utility subscription-based communications that notify them about updates associated with the utility or their account. You can specify which contact methods to use for each communication type.

To add a contact method to a communication, that contact method must already exist for the contact. You can set communication preferences for any push or subscription-based communication types that are configured in your Oracle Utilities customer information system. Contacts must sign up to receive these notifications.

These are some examples of push communication types that can be implemented:

- Credit and Collections
- Programs and Offers
- Service Advisory

These are some examples of subscription-based communication types that can be implemented:

- Bill Due
- Bill Ready
- Bill Routing Email
- Late Payment
- Payment Received

To set up subscription communications, you click the Enroll and add contact link next to an item. You then specify the contact method that should be used for that communication type. To set up push communications, you expand the notification, and then specify the contact method to use for that communication type. You can edit both subscription and push communication preferences.

In some cases, you can turn off a notification by removing the contact method from the communication type. However, some communications are mandatory or they are set up to use default notification preferences if a contact method isn't added. The rules associated with turning off a notification can vary by utility. Contact your manager if you have questions about how your utility manages notifications.

Be aware that some notifications are mandatory and cannot be removed. To learn more about notifications, see Setting Up Notification Preference Options in the Administrative User Guide associated with your Oracle Utilities customer information system. Documentation for these systems is available in the Energy and Water Help Center.

Enroll in a Push Communication

To enroll in a push communication:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary page, which lists all billing accounts associated with the contact. Use the **Update Communication Preferences** option from the action menu on the billing account you want to update.
   - Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Use the **Update Communication Preferences** option from the action menu on the contact you want to update.
2. The system opens the Communication Preferences drawer.
3. In the Push Communication Preferences section of the screen, expand the communication you want to enroll in.
4. In the **Add Preference** field, select from a list of valid contact method records.
5. If there are related persons who are also enrolled in the notification, a list of the contacts and the contact method are displayed.
6. Click **Save**.
7. Be aware that:
   - If no preferences have been set up for this communication type already, the system might use the default preferences, as defined in your customer information system. The system displays a message and provides a **View details** link to see any default preferences that have been defined.
   - If the person is not set up to allow communications, this section of the form will not contain any available communications to enroll in. Instead, the system displays a message that you can set preferences after the communications are allowed for the selected person. See Enabling Communications for a Contact for additional information.

Enroll in a Subscription Communication

To enroll in a subscription-based communication:

1. From Account 360, complete one of these steps:
   - Use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary page, which lists all billing accounts associated with the contact. Use the **Update Communication Preferences** option from the action menu on the billing account you want to update.

- Search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Use the **Update Communication Preferences** option from the action menu on the contact you want to update.

2. The system opens the Communication preferences drawer.
3. In the Subscription Communication Preferences section of the screen, click **Enroll and Add Contact** next to the communication you want to set up.
4. In the **Send To** field, select from a list of valid contact method records.
5. Be aware that notification types can be configured to enable users to set additional parameters. For example, a notification can be configured to enable the contact to enter a value in the Day(s) before notification field, which controls when the communication is sent. For example, if you want to receive the Bill Due communication 4 days before the billing due date, enter 4 in this field.
6. Click the Enroll button to save your changes.
7. Be aware that:
   - If no preferences have been set up for this communication type already, the system might use the default preferences, as defined in your customer information system. If default preferences are being used, the system displays a message and provides a **View details** link to see what the default preferences are.
   - If the person is not set up to allow communications, this section of the form will not contain any available communications to enroll in. Instead, the system displays a message that you can set preferences after the communications are allowed for the selected person. See Enabling Communications for a Contact for additional information.

Managing Billing Preferences

After you link a contact to a billing account, you can add or update billing preferences. Billing preferences enable you to specify how billing-related communications are handled for that contact and billing account combination.

Using billing preferences, you can specify:

- The contact's relationship to the billing account.
- Whether the contact receives a copy of the bill, and if so, specifics about the number of copies, routing, and format of the bill.
- The purchase order ID that displays on the bill. This field is enabled only if the contact receives a copy of the bill.
- Whether the contact receives collections and overdue notices for the billing account.
- Address information.
- Whether notifications are allowed.

> **Note**
>
> The information that displays in the Billing preferences drawer comes from your CIS. If this contact is specified as the main customer or a financially responsible person for this billing account in the CIS, some options are disabled, as they can't be changed. To enable these options, you must update the account in your CIS.

For information about how billing preferences are defined in your CIS, see "Account - Person Information" in the Business User Guide of your CIS system, which is available in the Oracle Utilities Help Center.

Updating Billing Preferences

To update billing preferences for a contact, you must first link the contact to a billing account. Then you can complete these steps:

1. To access the billing preferences, complete one of these steps:
   - From Account 360, use the **Show Contacts** smart action to view a list of contacts. On the contact you want to view, use the **Edit linked billing accounts** option to open the <Contact Name> Billing Account Summary drawer, which lists all billing accounts associated with the contact. Select the **Update Billing Preferences** option from the action menu on the billing account you want to update.
   - From Account 360, search for and select a billing account. Select **View contacts** from the action menu, which opens a drawer with a list of contacts. Select the **Update Billing Preferences** option from the action menu on the contact you want to update.
   - Navigate to the **My Contacts** screen in Oracle Fusion Service. Locate the contact you want to link to a billing account and select **Edit Linked Billing Accounts** from the action menu. On the <Contact Name> Billing Account Summary drawer, select the **Update Billing Preferences** option from the action menu on the billing account you want to update.
   - Navigate to the contact record in Oracle Fusion Service. Type **Edit Linked Billing Accounts** in the Action bar, and then select it to open the <Contact Name> Billing Account Summary drawer. Select the **Update Billing Preferences** option from the action menu on the billing account you want to update.
2. Update the billing preferences as needed, and then click **Save**.

Managing Outages

When service outages impact your customers, you can view outage data to view the following outage types:

- **Active Outages:** Outages that are currently impacting one or more premises.
- **Scheduled Outages:** Outages that are scheduled for one or more premises.
- **Recently Restored Outages:** Outages that recently impacted one or more premises, but service has been restored.

Note

Outage data is available only if your Oracle customer information system (CIS) is integrated with an outage management system. Additionally, how outages are configured in your CIS determines how outage data displays in your Customer Experience for Utilities Sales system. For example:

- Outage status codes in your CIS determine whether an outage is displayed as Active, Scheduled, or Recently Restored.
- The duration that an outage is displayed in the Recently Restored section is determined in your CIS. For example, your system might display outages that have been restored in the last 30 days.

For information about outage data in your CIS, see the "Outage Information" topic in the Business User Guide of your Oracle CIS, which is available in the Oracle Utilities Help Center.

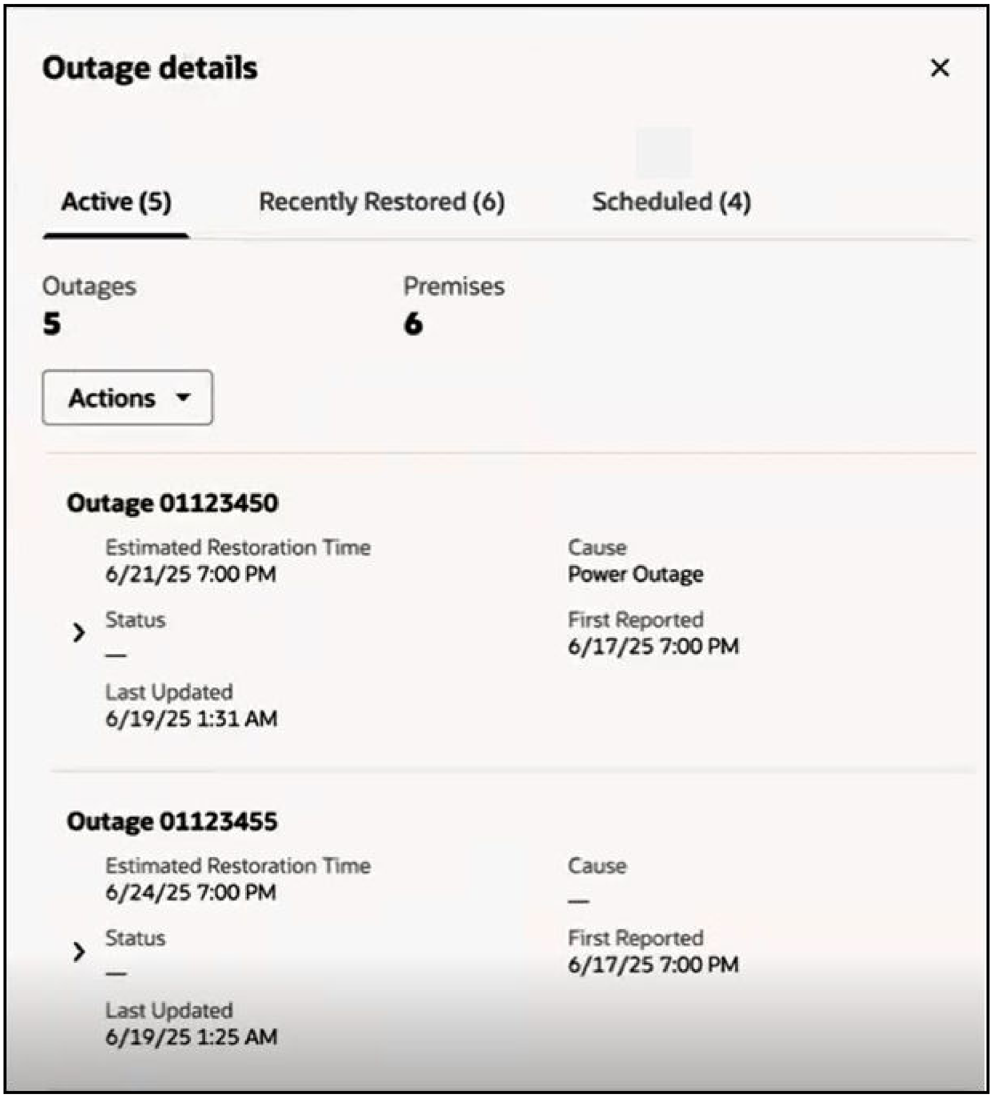
If there are outages, you can access the outage data in the Outage details drawer, which you can access from the Account 360 page by click on the View details link within an outage message at the top of the screen.

The Outage details drawer includes the following components:

- Tabs to view active, recently restored, and scheduled outages.
- An Action button that allows you to report an outage, create a note, or send an email.
- A list of outages or a message that tells you there are no outages for the selected account or premise.
- Details associated with each outage. You can click the arrow at the left of each outage to view additional details, such as the billing accounts and premises impacted by the outage.

This image shows an example of the Outage details drawer:

Figure 5-2 Outage Details Drawer



- Viewing Outage Data

Viewing Outage Data

To view outage data:

1. Navigate to the Account 360 page for your account, and click the **View details** link in the outage message at the top of the screen.
2. Use the **Actions** button at the top of the screen to complete one of these actions:
   - Report Outage: This option navigates you to your CIS where you can complete the process to report an outage.

> **Note**
>
> You can only report an outage from the Outage details drawer if there are existing outages.

- Create Note: This option navigates you to Oracle Fusion where you can create a note.
- Send Email: This option navigates you to Oracle Fusion where you can draft and send an email.

3. In the Outage details, drawer, click on the tab you want to view. Tabs include:
   - Active
   - Recently Restored
   - Scheduled

   The number of outages also appears next to the tab name. For example, if there are 3 scheduled outages, the Scheduled tab displays as **Scheduled (3)**.
4. Details of each outage, if available in your CIS, are displayed in the bottom of the screen. Review the following:
   - Scheduled Time (only displayed for scheduled outages)
   - First Reported (only displayed for active and recently restored outages)
   - Cause
   - Status (only displayed for active outages)
   - Estimated Restoration Time
   - Time of Restoration (only displayed for recently restored outages)
   - Outage Duration (only displayed for recently restored outages)
   - Last Updated
5. To view the billing accounts associated with each outage, click the **Details** button (**>**) to the left of the outage. The system displays a list of the billing accounts impacted by the outage.
6. To view the service points within that billing account that are impacted by the outage, click the **Details** button (**>**) next tot he billing account ID. The system displays a list of all impacted service points.
7. When you are done viewing outage data, click **Close** at the top of the Outage details drawer.

Using the Account Hierarchy

When you are dealing with large commercial or industrial accounts, there are typically multiple accounts that are related. You can use the Show Account Hierarchy smart action to view parent and child accounts associated with the Oracle Fusion account you are viewing in Account 360.

When you access the hierarchy, the account you are currently on is in the middle of the screen in a large card. This is the focus card. Above the focus card you will see the direct parent of the account, and below the focus card, all children of the account are displayed. You can click on any card to change the focus card, and see other parent and child relationships in the hierarchy in more detail.

The account title on the focus card is a hyperlink. When you click this link, the system brings you to Account 360 for the account on the focus card. You can also perform the following actions using the action menu at the top right of a focus card:

- View account details
- View account team
- Create a note, appointment or task
- Send an email

You can use these tabs at the bottom of the focus card to change your view:

- **Children:** This tab is selected by default. It shows the number of child accounts, and displays cards for each child Oracle Fusion account.
- **Billing Accounts:** This tab displays the number of billing accounts associated with the focus card, and displays cards for each of those billing accounts.

> **Note**
>
> The number of billing accounts displayed in the hierarchy may differ from the number of billing accounts displayed in the main Account 360 page. This is because billing accounts that do not have the Main Customer option selected in the billing account to person relationship record in your Oracle Utilities customer information system are excluded from the hierarchy view to avoid duplication of values when rolling up child data. The main Account 360 page shows all related billing accounts, even if they are not related as the main customer. For additional information, see "Control Central - Account Information" in the Business User Guide for your Oracle Utilities customer information system, available in the Energy and Water Help Center.

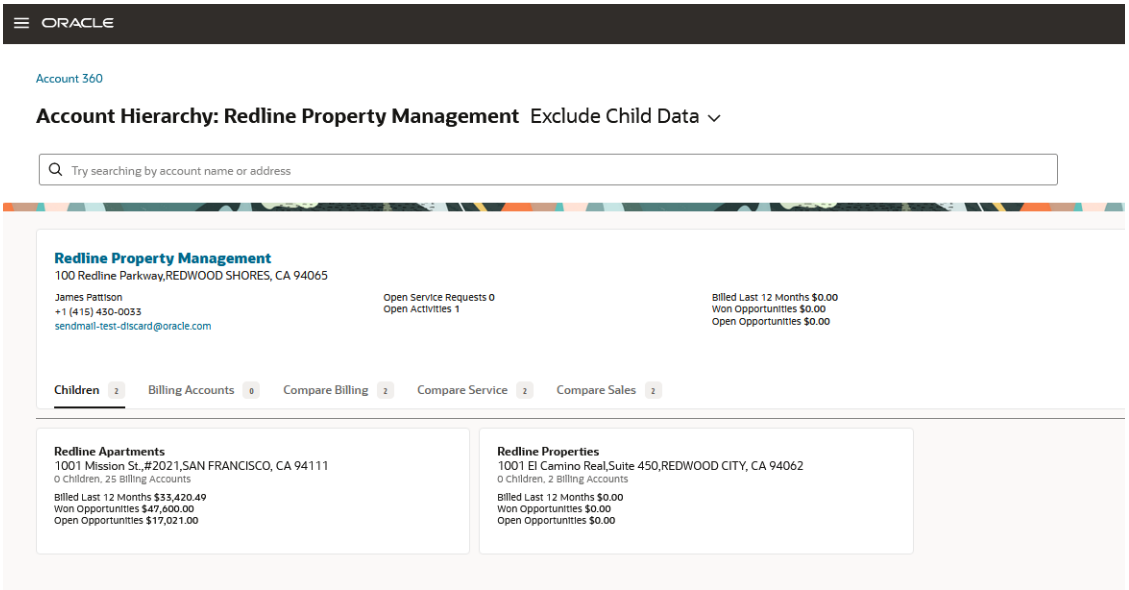
- **Compare Billing:** Use this tab to view a graphical comparison of the billing data associated with the child accounts.
- **Compare Service:** Use this tab to view a graphical comparison of the number of service requests associated with the child accounts.
- **Compare Sales:** Use this tab to view a graphic comparison of the number of open leads and opportunities associated with the child accounts, and the open amounts for each of them.

When the Children tab is selected, each card contains the following overview information:

- Open Service Requests (included only on the focus card)
- Open Activities (included only on the focus card)
- Billed Last 12 Months
- Won Opportunities
- Open Opportunities

This image shows an example of the hierarchy view when the Children tab is selected:

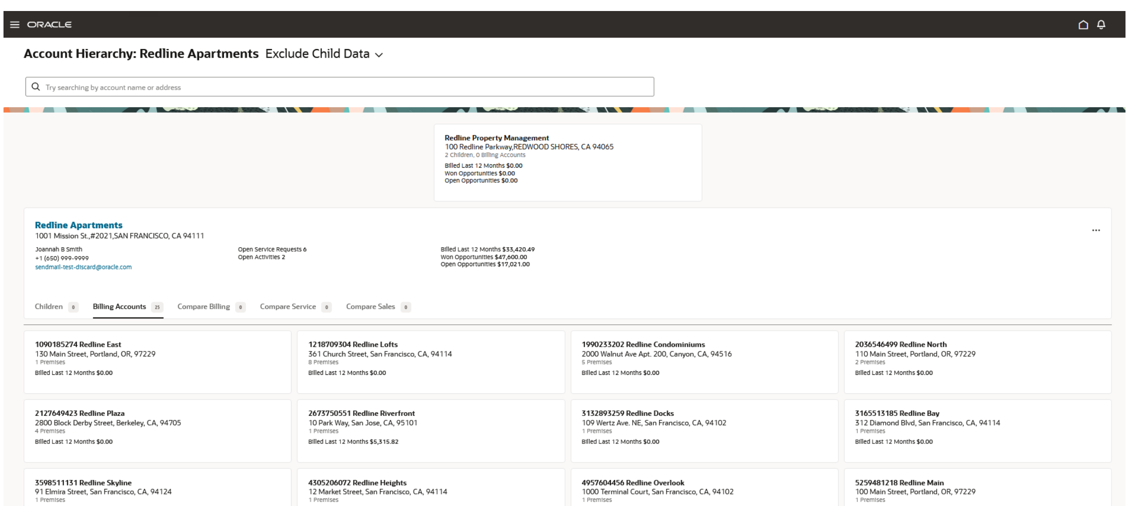
Figure 5-3 Account Hierarchy - Child View



When the Billing Account tab is selected, only Number of Premises and Billed Last 12 Months are displayed on the child cards, as opportunities are associated with Oracle Fusion accounts, and not billing accounts.

This image shows an example of the hierarchy view when the Billing Accounts tab is selected:

Figure 5-4 Account Hierarchy - Billing Account View



For examples and information about the Compare tabs, see Comparing Data in the Hierarchy.

You can use the option at the top of the screen, next to the account name, to include or exclude child data from the overview information. If you include child data, the overview information on the cards includes data from that account and all of the children below that account. If you exclude child data, the overview data on the card is related to that account only.

When you are done viewing the hierarchy, you can use the link at the top left of the page to return to Account 360. Note that if you changed the focus card, and then use the link to return to Account 360, you will return to the account you were originally viewing when you accessed the hierarchy.

Topics in this section include:

- Navigating the Account Hierarchy
- Comparing Data in the Hierarchy

Navigating the Account Hierarchy

You can use the Show Account Hierarchy smart action in Account 360 to access the account hierarchy for a selected account. You can click on different cards within the hierarchy to change the focus, and view information about child accounts or about associated billing accounts. Within the hierarchy, you can use the action menu on the focus card to perform additional actions.

View the Account Hierarchy

To view the account hierarchy:

1. Access Account 360 for your account.
2. In the Smart Action bar, type and then select **Show Account Hierarchy**.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Select the appropriate option at the top of the screen to include or exclude child data from your cards.
5. Click on different cards to change the focus card and view additional relationships in the hierarchy.
6. Select the Billing Accounts tab in the focus card to view all billing accounts that are associated with the focus card account.
7. To return to Account 360 for the account you were originally viewing, use the **Back** arrow at the top left of the page.
8. To see Account 360 for a different account, make the account you want to view the focus card, and then click the **Account Title** hyperlink on the card.

Use Action Menu Options in the Account Hierarchy

To use action menu items in the account hierarchy:

1. Access Account 360 for your account.
2. In the Smart Action bar, type then select **Show Account Hierarchy**.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Click the **Action** menu on the right side of the focus card and select one of these options:
   - View Team
   - Create Note
   - Create Appointment
   - Create Task

- Send Email

5. A drawer opens with the relevant information from Oracle Redwood Sales. See the Oracle Sales Help Center for additional information.
6. View and update the information as needed and save your changes.
7. Close the drawer and return to the account hierarchy to continue working.

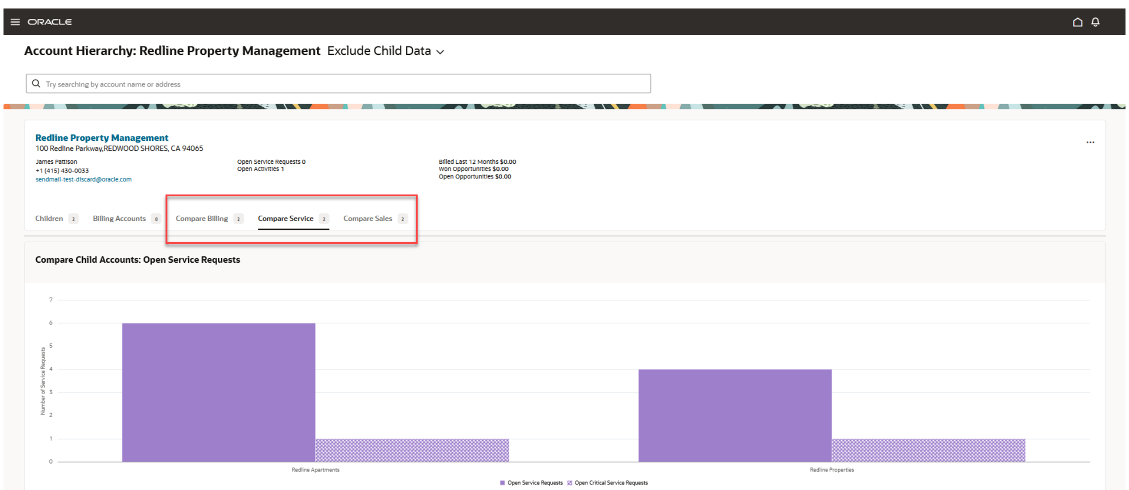
Comparing Data in the Hierarchy

You can use the account hierarchy to compare billing, service, and sales information across the accounts in the hierarchy. Compare tabs are available on each card that has child accounts or multiple billing accounts associated with it.

When you click on a Compare tab, the system displays charts that provide a visual comparison of either billing, service, or sales data for the associated accounts. When you hover over a bar in the charts, the system displays additional information about the bar, and provides links you can click to view additional details.

This image shows an example of the Compare Service chart, and identifies where the comparison tabs are on the focus card:

Figure 5-5 Account Hierarchy - Compare Service



The **Compare Billing** chart displays bars that represent the amount billed during the last 12 months. The bars are split into different sections, based on the service type that was billed. When you click on a bar, the system brings you to the account associated with the bar, and when you hover over a section of the bar, the tool tip displays:

- The date range associated with the billed amount
- The service type and amount billed
- The name of the account associated with that bar
- The number of billing accounts included in the amount

The **Compare Service** chart displays bars that represent the number of service requests and the number of critical service requests that are associated with each account. When you click on a bar, the system brings you to the account associated with the bar, and when you hover over a bar, the tool tip displays:

- The number of open service requests
- The name of the account associated with that bar
- The number of billing accounts

The **Compare Sales** chart displays data that represent the number of sales leads and opportunities, as well as the amounts associated with them. When you click on a bar or data point, the system brings you to the account associated with the bar, and when you hover over a bar, the tool tip displays:

- The open revenue associated with that bar, which is measured on the left side of the chart
- The name of the account associated with that bar
- The number of billing accounts

The chart also includes data points that display the number of open leads and opportunities, which are measured along the right side of the chart. When you hover over a data point, the system displays:

- The number of open leads or opportunities
- The name of the account associated with that bar
- The number of billing accounts

Compare Data in the Hierarchy

To compare data in the hierarchy:

1. Access Account 360 for your account.
2. In the Smart Action bar, type and then select **Show Account Hierarchy**.
3. The system opens the Account Hierarchy page and displays the account structure in cards, using the selected account as the focus card.
4. Select the appropriate option at the top of the screen to include or exclude child data from your cards.
5. Click on different cards to change the focus card and view additional relationships in the hierarchy.
6. Click the one of these tabs to view a comparison for all cards below the focus card:
   - Compare Billing
   - Compare Service
   - Compare Sales
7. Hover over the chart components, such as bars or data points, to view additional information for each component.
8. Click on a bar, bar section, or data point to access details at the specific account level.

Exporting Data from Account 360

Many key account managers need to create reports to analyze data, or provide printed information to their managers or customers. To facilitate these tasks, key account managers can export data from multiple places within Account 360.

Data that can be exported is noted with an Export button or icon. When you click the button or icon, you can select the export format for your data. The available options vary, depending on the data you are exporting, but can include:

- Export to Excel
- Export to CSV

After you select an option, the system displays the Export started message. The export must complete before you can continue working in Account 360. Be aware of the following:

- When you export chart data, the data associated with the displayed chart is exported, not the image.
- System administrators can restrict the number of rows that can be exported to manage performance. If your data set exceeds the configured threshold, the system displays a message indicating how many rows of the data set were exported.

Viewing Premise and Service Details

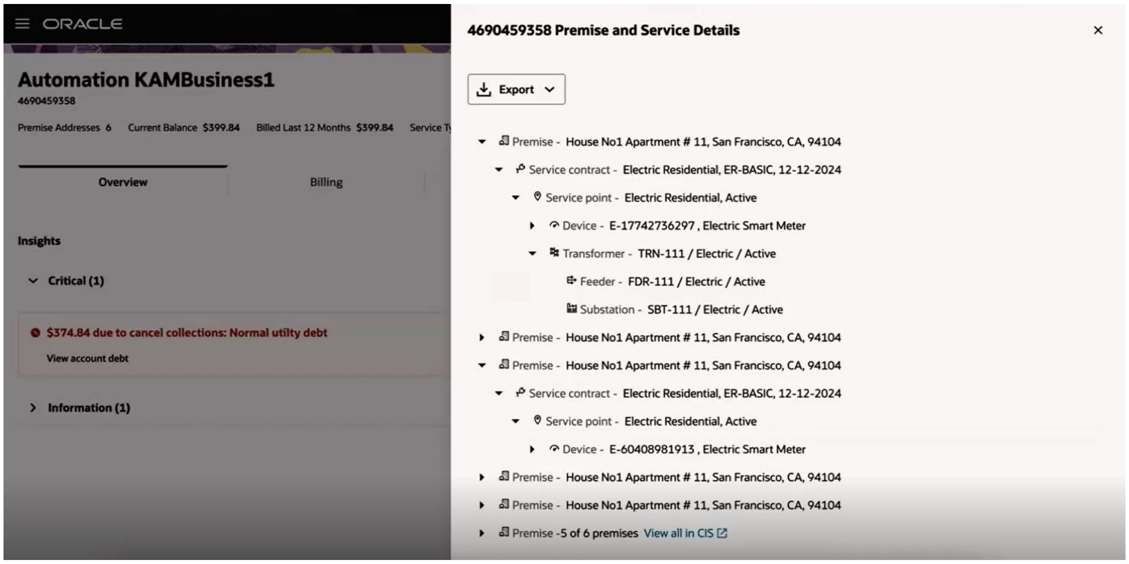
After you select a billing account in Account 360, you can then view premise and service details for that billing account in an expandable tree structure. To view these details, click the View Premise and Service Details button at the top of the screen. The system displays the Premise and Service Details drawer with the expandable tree. The typical tree structure includes the following levels:

- Premise
  - Service Contract
    - Service Point
      - Device
        - Component
      - Transformer
        - Feeder
        - Substation

> **Note**
>
> Transformers, feeders, and substations are only associated with electric service contracts.

This image shows an example of premise and service details:

Figure 5-6 Premise and Service Details



By default, the tree includes the first five premise addresses associated with the selected billing account. If there are more than five, you can click the View All in CIS link at the bottom of the list of active premises to view all premise and service details in your customer information system.

The tree also includes inactive premises, which are defined as premises without any active service contracts. The Inactive Premises node appears after the active premise nodes. You can expand this node to view the first five inactive premises associated with the selected billing account. Be aware that when viewing inactive premises in the tree, you can only drill down to the service contract level, where you can view the details of the prior service contracts. Also, if there are more than five inactive premises, you can click the View closed contracts in CIS link, which directs you to a search in your customer information system, where you can search for all inactive premises and service contracts.

For additional information about viewing premise and service details in your Oracle Utilities customer information system, see "Control Central" in the Business User Guide for your system, which is available in the Energy and Water Help Center.

At the bottom of the tree structure, any associated accounts are also listed. An associated account might appear in the Premise and Service Details if a premise has multiple services, and one of them is under one account, and the other is under a different account. For example, if a tenant pays for the electricity, and the landlord pays for the water. These accounts might display as associated accounts. You can click on the associated account to view that account in Account 360.

View Premise and Service Details

To view premise and service details:

1. Access Account 360 for your key account.
2. Using the smart action bar, search for and select a billing account. You must select a billing account to continue.
3. At the top right of the screen, click the **View Premise and Service Details** button.

4. The system displays the Premise and Service Details drawer, which includes an expandable list, starting with the highest level, which is typically the premise address.
5. Expand and collapse the nodes of the tree as needed to view the details of each item.
6. If there are more than five premises, you can click the **View All in CIS** link at the bottom of the tree to see a complete list in your customer information system. Similarly, if there are more than five inactive premises, use the **View Closed Contracts in CIS** link to view the details of the billing account's closed service contracts. The system opens a new tab where you can continue your work in your customer information system. When you are done, close the tab and return to CX for Utilities Sales.
7. To view the Account 360 for an associated account, click on the hyperlink in the **Associated Account** node. This action brings you to Account 360 for the associated account. Click the browser Back button to return to the original account.
8. To return to Account 360 for the key account, click your browser Back button.

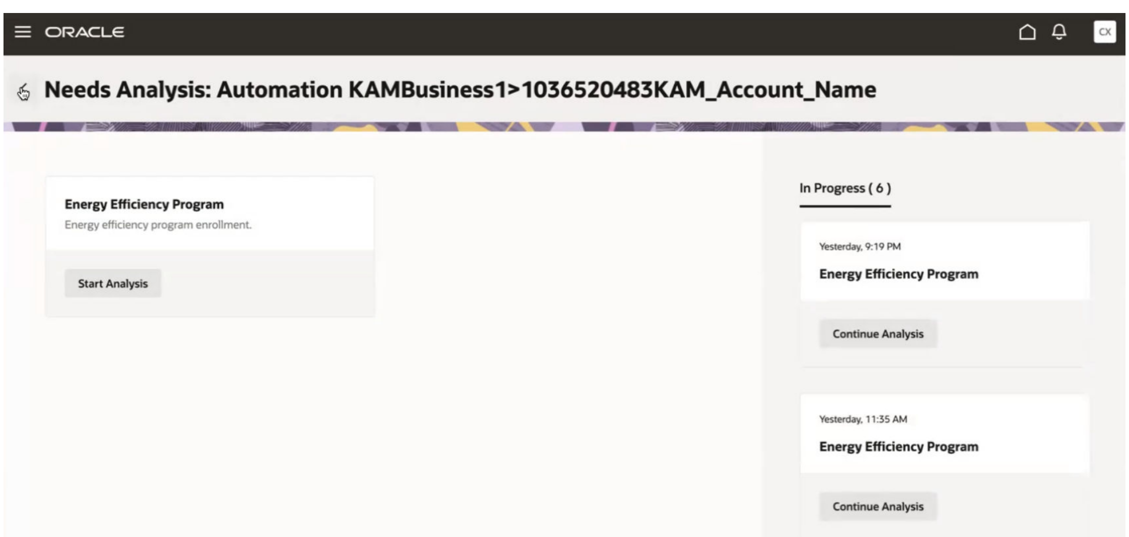
Using the Needs Analysis Dashboard

To better understand the needs of your accounts, you can perform a needs analysis, which identifies possible sales opportunities with your utility customers. Needs analysis interviews, and the rules and questions associated with them, are defined using the Oracle Intelligent Advisor system. You use the Needs Analysis Dashboard to launch new interviews, or to access interviews that are in progress. Needs analysis interviews are performed at the billing account level.

> **Note**
>
> This feature requires the use of Oracle Intelligent Advisor (OIA). This system is no longer being sold. However, if you already have an OIA license, you can use the system to enable this feature. If you do not already have an OIA license, this feature is not available.

This image shows an example of the Needs Analysis Dashboard:

Figure 5-7   Needs Analysis Dashboard



The Energy Efficiency Programs interview is delivered with CX for Utilities Sales. This interview includes questions that you can ask your contacts to help you gather information about their account. After answering the questions, the system displays a list of recommendations. You can discuss these options with your contact to determine which plan is the best fit, and then select one of these options:

- Ready to move forward? (Create Opportunity)
- Need more time to decide? (Create Lead)
- Other follow up options

If you specify that the customer is ready to move forward when you save and submit the interview, the system automatically creates an opportunity that includes the products listed in the selected plan option. If you specify that the customer needs more time to decide, the system creates a lead that includes the selected plan details. And if you select the other follow up options when you save and submit the interview, the system gives you the choice of creating an appointment or a task that you can use to follow up with the customer at a later date.

You can also create leads, opportunities, notes, appointments, and tasks, or send an email, directly from the interview before completing the interview. You can then view or edit these records as needed. These options might be needed in the following scenarios:

- Your contact asks you to call back at another time to complete the interview. In this case, you can create an appointment or a task to remind you to call them back.
- Your contact tells you about another company that has similar needs to theirs. In this case, you can create a lead to follow up with the other company.

For additional information about creating or editing these records, see:

- Managing Activities for information about notes, appointments, and tasks.
- Using the Leads and Opportunities tab for information about leads and opportunities.

Be aware that once you launch an interview from the dashboard, the system immediately creates a record for that interview. If you do not complete the interview, you can exit the interview and then it will then be available in the In Progress section of the dashboard, where you can complete it at a later date. These in-progress interviews show the name of the original interview and are listed in order of the date they were last updated.

For additional information about items related to this topic, see:

- Oracle Intelligent Advisor Implementation Tasks for details about how your implementation might vary.
- Managing Activities for information about notes, appointments, and tasks.
- Using the Leads and Opportunities tab for information about leads and opportunities.

Topics in this section include:

- Performing a Needs Analysis

Performing a Needs Analysis

Use a Needs Analysis to determine what items you are likely to sell to your customer, and when they will be ready to purchase the items.

> **Note**
>
> The following task is based on the Energy Efficiency Programs interview, created with the Oracle Intelligent Advisor (OIA) system, that was delivered with CX for Utilities Sales. Be aware that:
>
> - This feature requires the use of Oracle Intelligent Advisor (OIA). This system is no longer being sold. However, if you already have an OIA license, you can use the system to enable this feature. If you do not already have an OIA license, this feature is not available.
> - If your utility updated the interview, these steps might not reflect what you see on your screen.

Perform a Needs Analysis

To perform a needs analysis interview:

1. Access Account 360.
2. Search for and select a billing account on which you want to perform a needs analysis.
3. Click the action menu button at the top of the screen, and select **View Needs Analysis Dashboard**.
4. On the Needs Analysis: <Account Name> screen, click the **Start Analysis** button on the Energy Efficiency Program card.
5. The system creates a record for your interview and opens the Energy Efficiency Program screen.

   > **Note**
   >
   > If you exit the interview before you complete it, the interview will appear in the In Progress area of the Needs Analysis Dashboard screen. You can click the Continue Analysis button on the interview card at any time to continue with these steps.

6. The following fields are automatically populated based on your billing account details, but you can select different values for each using the drop down options:
   - Account
   - Contact
   - Billing Account
7. If needed, use the action menu to create additional items, such as leads, opportunities, appointments, tasks, notes, and emails. These are created in addition to any records that are created when you complete the interview process. For example, your contact might ask you to call him back tomorrow because he is not available to complete the interview right now. In this case, you could create an appointment or a task to remind you to contact the person again tomorrow.
   - Lead
   - Opportunity
   - Note
   - Appointment

- Task
- Email

> **Note**
>
> Selecting one of these options opens a drawer where you can create your record. When you are done, close the drawer to return to this tab to complete your interview or exit out of the Needs Analysis Dashboard.

8. Complete the questions in the Energy Efficiency Program Enrollment section.
9. Click **Next**.
10. The system displays the recommended plans for you to discuss with your customer. Each plan option includes:
    - Plan name and description
    - List of products included in the plan
    - **More details** option that enables you to view additional details about each plan
11. If applicable, select a plan and then select one of these options:
    - **Ready to move forward?** (Create Opportunity): If you select this option, you must select a plan before you can complete the interview. When you complete the interview, the system automatically creates an opportunity that includes the products included in the plan. The name of the opportunity is Needs Analysis - Energy Efficiency Program <Date/Time>.
    - **Need more time to decide?** (Create Lead): If you select this option, you must select a plan before you can complete the interview. When you complete the interview, the system automatically creates a lead that includes the products included in the plan. The name of the lead is Needs Analysis - Energy Efficiency Program.
    - **Other follow up options:** If you select this option, you do not need to select a plan. However, you must select one of these sub-options:
      - **Create Appointment:** If you select this option, the system creates an appointment with the plan options in the Description field. The name of the appointment is Needs Analysis - Energy Efficiency Program - <Billing Account ID and Name>.
      - **Create Task:** If you select this option, the system creates a task with the plan options in the Description field. The name of the task is Needs Analysis - Energy Efficiency Program - <Billing Account ID and Name>.
12. Click the **Accept & Submit** button.
13. The system returns you to the Needs Analysis Dashboard, and a message appears at the bottom indicating what type of record was created. For example, the "Lead Created" message might appear.
14. You can then view or edit any of the records you created as needed. For additional information, see:
    - Managing Activities to view or edit appointments and tasks
    - Using the Leads and Opportunities tab to view or edit leads and opportunities

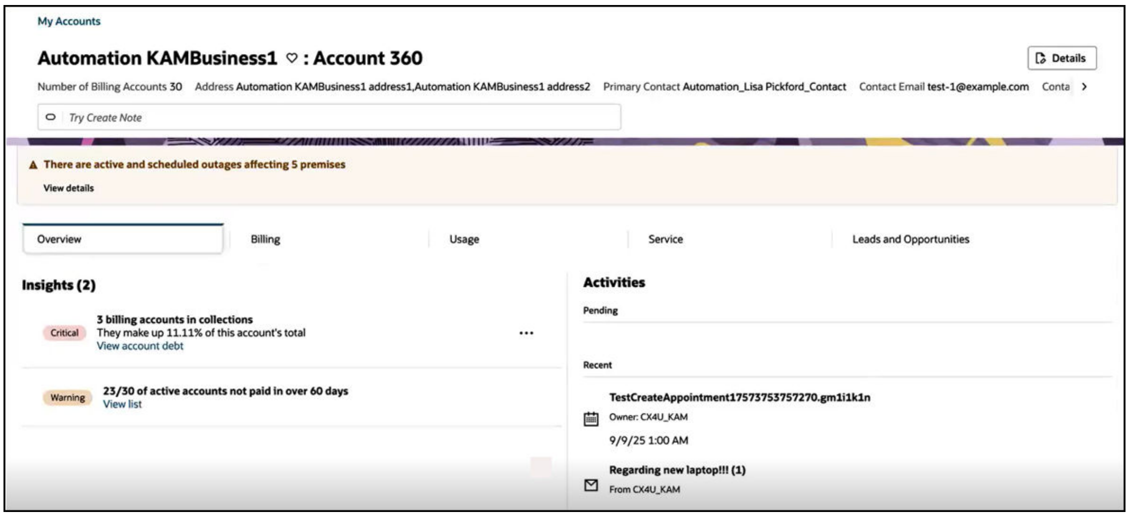
Using the Overview Tab

When you select a key account in the Business List, the system displays the Overview tab by default. You can use the Overview tab to view:

- A list of account insights, which include messages and warnings that you might need to follow up on. Some insights provide access to account debt information.
- A list of pending and recent tasks that are associated with the Fusion account or a selected billing account.

The Overview tab gives you an at-a-glance view of the insights and activities that are important to you. This image shows an example of the Overview tab:

Figure 5-8 Overview Tab



Topics in this section include:

- Managing Insights
- Managing Account Debt
- Managing Activities

Managing Insights

The Insights section of the Overview tab provides you with lists of insights associated with the account or billing account you are viewing in Account 360. Insights are informational and can point out areas where your key account might need attention. Billing and collections insights are grouped by severity, and you can click the **View list** or **View account debt** links in each severity category to view additional details about the related insights.

Current insight types include:

- **Billing insights:** These insights identify accounts that have overdue amounts. The insights are triggered in your customer information system when an account has a past-due balance. The severity of these insights can be customized by your utility.

- **Collections insights:** These insights identify accounts that are in the collections or severance process. These insights are triggered in your customer information system when an account has been added to the collections or severance process. By default, collections insights are categorized as critical.
- **Contract renewal insights:** These insights notify users that there are service contracts that are expiring soon. These insights are triggered by the existence of opportunity records with the opportunity type of RENEW for the account. The close date of the opportunity determines the severity of the insight.

> **Note**
>
> Oracle recommends that utilities use either billing insights or collections insights. If your utility uses both types of insights, it is possible that an account with an overdue balance will trigger both a billing insight and a collections insight.

For additional information about setting up insights in your customer information system, see "Insight Types" in the Framework Administrative User Guide associated with your customer information system. Documentation for these systems is available in the Energy and Water Help Center.

Topics in this section include:

- Using Billing Insights
- Using Contract Renewal Insights
- Using Collections Insights

Using Billing Insights

Billing insights identify accounts that have overdue amounts. The insights are triggered in your customer information system when an account has a past-due balance. The severity of these insights can be customized by your utility.

Billing insights are displayed individually as detail insights, or grouped into a summary insight if there are several of the same type and severity. Summarization is configurable in your customer information system using algorithms and insight settings. You can configure these algorithms and insights to use a summarization threshold. This threshold determines how many detail insights of the same type and severity are required to send a summary insight. Your CIS then sends either summary or detail insights to Account 360 based on these settings.

You can complete these tasks to view information about a billing insight:

- Click the **View Details** link on an individual billing insight to access the Billing tab in Account 360, where you can view additional details.
- Click the **View List** link on a summary billing insight to open the Insight List drawer. The list provides you with all of the individual insights that have been included in the summary insight. You can then click the View Details link on an individual insight to access the Billing tab, where you can view additional details.

View Billing Insights

To view billing insights:

1. Access Account 360 for your account.
2. Click the **Overview** tab.

3. Scroll through the list of insights as needed to view all of the insights for your account.
4. On a summary billing insight, click the **View List** link to open the Insight List on the right side of the screen. Click the **X** at the top right of the drawer to close the Insight List.
5. On a detail billing insight, whether in the Overview tab or in the Insight List, click the **View Details** link to navigate to the Billing tab of the associated billing account is displayed. See Using the Billing Tab for additional information.
6. Select the Overview tab for the appropriate account to return to your list of insights.

Using Contract Renewal Insights

Contract renewal insights notify users that there are service contracts that are expiring soon. These insights are triggered by the existence of opportunity records for your selected account that have the opportunity type of RENEW. The close date of the opportunity determines the severity of the insight, as follows:

- **Critical:** The close date has passed.
- **Warning:** The close date is within 30 days of the current date, and includes the current date.
- **Information:** The close date is more than 30 days from the current date.

Contract renewal insights are displayed individually as detail insights, or grouped into summary insights if there are three or more of the same severity.

You can complete these tasks to view information about contract renewal insights:

- Click the **View Details** link on an individual contract renewal insight to access the Opportunity Details page in Redwood Sales, where you can view additional details about the contract renewal opportunity.
- Click the **View List** link on a summary contract renewal insight to view the Insight List drawer. The list provides you with all of the individual insights that have been included in the summary insight. You can then click the View Details link on an individual insight to access the Opportunity Details page in Redwood Sales.

See the Oracle Sales Help Center for additional information about working with lead and opportunity records.

View Contract Renewal Insights

To view contract renewal insights:

1. Access Account 360 for your account.
2. Click the **Overview** tab.
3. Scroll through the list of insights as needed to view all of the insights for your account.
4. On a summary insight, click the **View List** link to open the Insight List on the right side of the screen. Click the **X** at the top right of the drawer to close the Insight List.
5. On a detail insight, whether in the Overview tab or in the Insight List, click the **View Details** link to navigate to the Opportunity Details page in Redwood Sales.
6. Use your browser's Back button to return to Account 360.

Using Collections Insights

Collections insights identify accounts that have been included in the collections or severance process in your Oracle Utilities customer information system. By default, all collections insights are listed with a severity of critical.

For information about how accounts are included in the collections process in your customer information system, see "How Arrears History is Captured" in the Business User Guide associated with your Oracle Utilities system, which is available in the Energy and Water Help Center.

There are two types of collections insights:

- **Account 360 collections insights:** When you are on the Account 360 view, collections insights are summarized, and they identify:
  - The number of associated billing accounts that are in collections
  - The percentage of the total amount due that is in collections
- **Billing account collections insights:** When you are viewing an individual billing account, collections insights are more detailed, and they identify:
  - The dollar amount that is in collections
  - The type of debt
  - The next event in the collections process

You can complete these tasks to view information about a collections insight:

- Click the **View account debt** link on a collections insight to access the Debt Summary drawer. This drawer provides additional information about the debt.
- Click the **View collections service requests** link on an Account 360 collections insight to open the Service tab, which is automatically filtered to display only collections service requests. This link is not available on billing account collections insights.

View Collections Insights

To view collections insights:

1. Access Account 360 for your account.
2. Click the **Overview** tab.
3. Scroll through the list of insights as needed to view all of the insights for your account. By default, all collections insights are in the Critical category.
4. On a collection insight, click the **View account debt** link to open the Debt Summary drawer on the right side of the screen. For additional information about using the Debt Summary drawer, see Managing Account Debt. Click the **X** at the top right to close the drawer.
5. While in the Account 360 view, click the **View collections service requests** link to navigate to the Service tab. The system automatically filters the list of service requests to display only those that are used for the collections process. See Using the Service Tab for additional information.
6. Select the Overview tab for the appropriate account to return to your list of insights.

Managing Account Debt

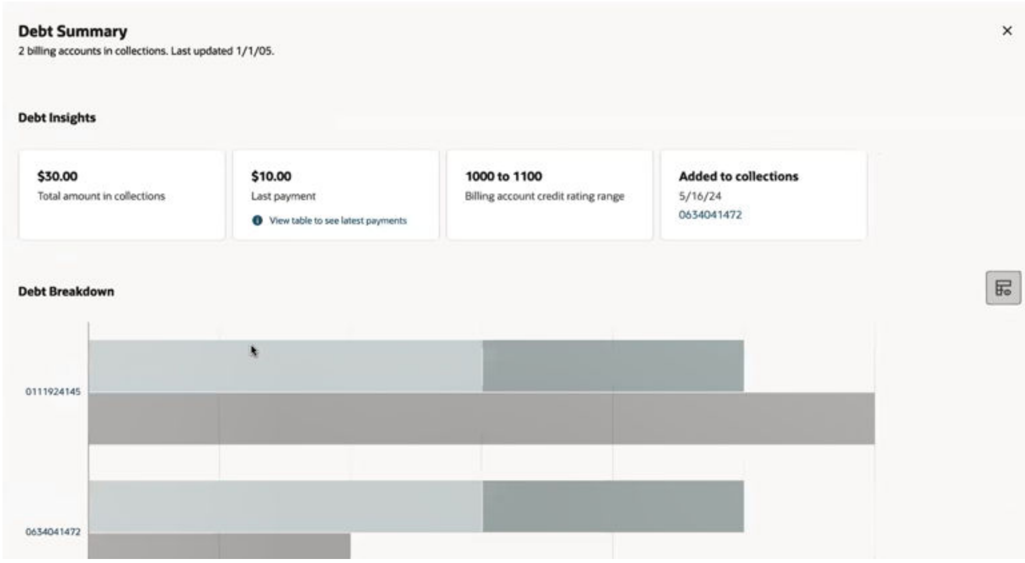
When utility accounts enter into the collections or severance process in your customer information system, insights are displayed on the Overview tab of Account 360. You can use links from those insights to view detailed information about the debt that is associated with the account.

When you click the View account debt link on a collections insight, the system displays the Debt Summary drawer, which includes:

- **Header details:** At the top of the screen, the system displays the following information:
  - Number of billing accounts in collections. This is displayed only if you access the drawer from the Account 360 view.
  - The date that the collection information was last received from the customer information system. For information about how debt information is handled in your customer information system, see "How Arrears History is Captured" in the Business User Guide associated with your Oracle Utilities system, which is available in the Energy and Water Help Center.
- **Scorecards:** At the top of the screen, the system displays scorecards that provide an at-a-glance view of important debt details. Scorecards include:
  - Total amount in collections
  - Last payment
  - Billing account credit rating (available only when you access the drawer from a billing account)
  - Billing account credit rating range (available only when you access the drawer from Account 360)
  - Added to collections (available only when you access the drawer from Account 360)
- **Debt Breakdown:** This section of the screen provides you with a chart or a table view that details the debt information. You can toggle between the chart and table views using the icon at the top right of this section, and you can view the following information by billing account:
  - Amount in collections
  - Minimum amount due
  - Amount of any scheduled payments
- **Collections Service Requests:** This section of the screen lists all collections service requests associated with the selected account or billing account. If there are no collections service requests, the system displays a button that enables you to create a collections service request to help you manage the activities associated with collecting the account's debt.

This image shows an example of the Debt Summary drawer:

Figure 5-9 Debt Summary Drawer



Topics in this section include:

- Using Debt Scorecards
- Using the Debt Breakdown
- Managing Collections Service Requests

Using Debt Scorecards

When you access the Debt Summary drawer, there are several scorecards that appear at the top of the screen. These scorecards provide you with an at-a-glance view of important debt details. The scorecards that are displayed vary, depending on whether you access the Debt Summary drawer from the Account 360 view or from a specific billing account.

These are the scorecards that are displayed in the Debt Summary drawer:

- **Total amount in collections:** This scorecard displays the total amount that is currently in the collections process. If you are on the Account 360 view when you access the Debt Summary drawer, this amount is the total amount associated with all of the billing accounts that are associated with the account. If you are on a billing account when you access the Debt Summary drawer, the amount represents only the amount in collections for the selected billing account.
- **Last payment:** This scorecard displays the amount of the last payment received towards the amount in collections. You can click on this scorecard to display the table view of the account debt in the Debt Breakdown section of the screen.
- **Billing account credit rating:** This scorecard displays the credit rating of the selected billing account. This scorecard appears only when you access the Debt Summary drawer from a specific billing account.
- **Billing account credit rating range:** This scorecard displays the credit rating range of all associated billing accounts that are currently in collections. This scorecard appears only when you access the Debt Summary drawer from the Account 360 view.
- **Added to collections:** This scorecard displays the date that the most recent billing account was added to the collections process. If only one billing account was recently

added, the billing account ID is displayed on the scorecard. If multiple billing accounts were added to collections on the same date, the scorecard displays the number of billing accounts that were added to collections on that date. This scorecard appears only when you access the Debt Summary drawer from the Account 360 view.

Using the Debt Breakdown

The Debt Breakdown section of the Debt Summary drawer provides you with a chart or a table view that details the debt information. You can toggle between the chart and table views using the icon at the top right of this section.

When you first enter the Debt Summary drawer, the system displays the chart, which includes summarized debt information for each billing account. You can toggle to the table format to view additional debt details.

If you access the Debt Summary drawer from the Account 360 view, debt information for all associated billing accounts that are in collections appears in the chart and table views. If you access the Debt Summary drawer from a specific billing account, the chart and table views display data only for the selected billing account.

Debt Breakdown Chart View

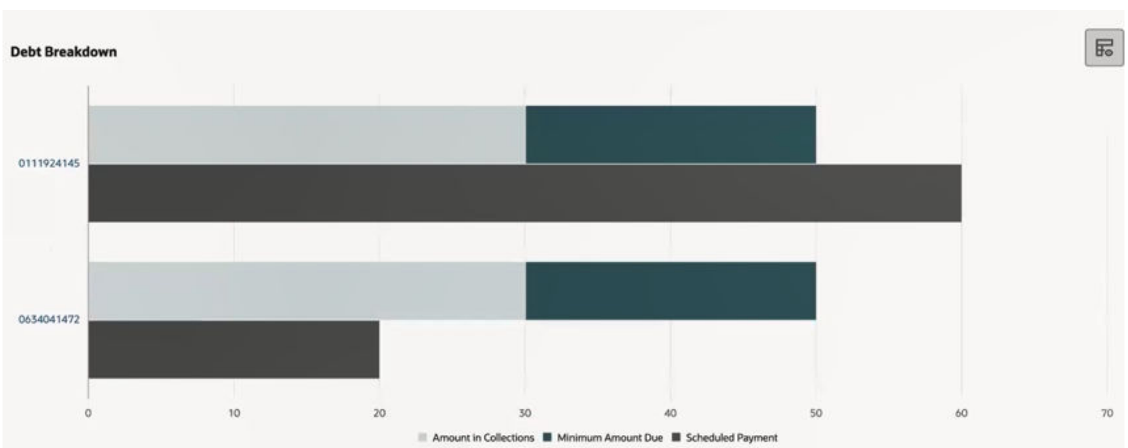
The chart view is displayed by default when you access the Debt Summary drawer, and it includes the following information for each billing account in collections:

- The amount in collections
- The minimum amount due, which is displayed as a portion of the total amount in collections
- Scheduled payments

You can hover over any section of the chart to view additional detail.

This image shows an example of the Debt Breakdown chart:

Figure 5-10 Debt Breakdown Chart



Debt Breakdown Table View

To display the table view of the Debt Breakdown, do one of the following:

- Click the Last Payment scorecard at the top of the screen.
- Click the toggle icon at the top right of the chart to change the view.

The table view provides more detailed debt information, including:

- **Multiple scheduled payments:** If there are multiple scheduled payments for a billing account, the table view includes a View list link in the Scheduled Payment Date column. You can click this link to view the date and amount associated with each scheduled payment.
- **Disconnection information:** The Disconnection column provides details about when the billing account was or will be included in the disconnection process. You can hover over the details in the Disconnection column to view additional details.

This image shows an example of the Debt Breakdown table:

Figure 5-11 Debt Breakdown Table

Debt Breakdown

Billing Account Number	Billing Account Name	Amount in Collections	Minimum Due	Last Payment	Last Payment Date	Scheduled Payment	Scheduled Payment Date	Disconnection
0111924145	-	$30.00	$20.00	$5.00	5/16/24	$60.00		Started 5 days ag...
0634041472	-	$30.00	$20.00	-	-	$20.00	1/1/50	Started 5 days ag...

Managing Collections Service Requests

When your accounts have been entered into the collections or severance process, you can use service requests to track the activities associated with collecting the outstanding debt. You can create, view and manage service requests in different ways:

- Access the Service tab from Account 360 to create, view and manage service requests.
- Click the **View collections service requests** link from a collections insight to access the Service tab, which is automatically filtered to display only collections service requests. This link is available only on collections insights when you are in the Account 360 view.
- Click the **View account debt** link from any collections insight and scroll down to the Collections Service Requests section of the Debt Summary drawer.

> **Note**
>
> This topic discusses how to manage collections service requests from the Debt Summary drawer. See also:
>
> - [Using the Service Tab] for additional information about creating and managing service requests from the Service tab.
> - [Managing Insights] for additional information on collections insights.
> - [Using Service Center in the Redwood Experience Guide] for additional information about how to manage service requests and action plans in Oracle Fusion Service.

When you access the Debt Summary drawer, the Collections Service Requests section is displayed below the Debt Breakdown. This section of the screen lists all unresolved collections service requests with a category of Collections that are associated with the selected account or billing account.

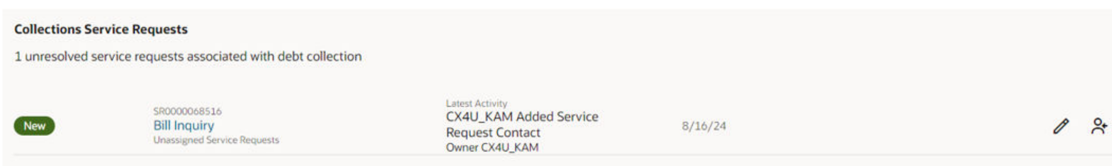
> **Note**
>
> Your utility defines the service request category to use for collections. For the purposes of this documentation, we will call this category Collections, but the category you use might be different.

Each service request record in the list includes:

- Status badge that coincides with the service request status.
- Service request number.
- Hyper-linked service request name that you can click to access the service request in Oracle Fusion Service.
- The name of the person assigned to the service request, or "unassigned" if it has not yet been assigned.
- The latest activity associated with the service request, the person who completed the activity, and the date of the activity.
- Action plan details if an action plan has been added to the service request.

This image shows an example of the Collections Service Requests section of the Debt Summary drawer when there are existing service requests:

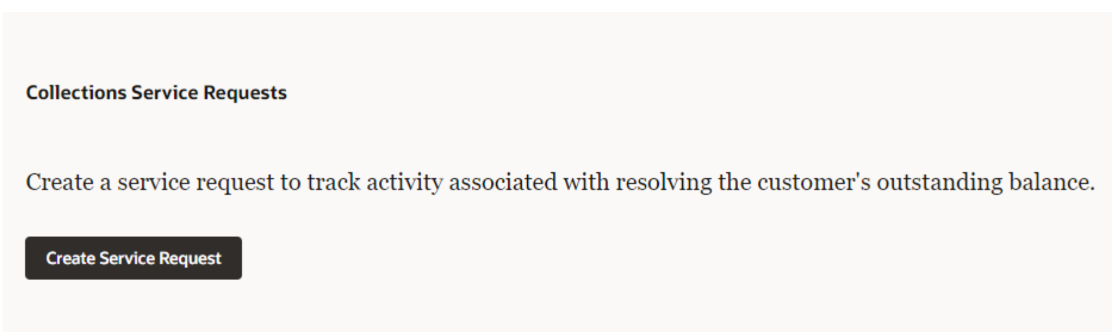
Figure 5-12 Collections Service Requests



If there are no collections service requests, the system displays a button that enables you to create a collections service request.

This image shows an example of the Collections Service Requests section of the Debt Summary drawer with no existing service requests:

Figure 5-13 Create Collections Service Request



Manage Collections Service Requests

To create and manage collections service request from the Debt Summary drawer:

1. Access Account 360 for your account.
2. Click the Overview tab.
3. Collapse and expand the Critical severity category as needed to view all collections insights.
4. On a collections insight, click the **View account debt** link to open the Debt Summary drawer on the right side of the screen.
5. Scroll down to the Collections Service Requests section of the screen, and click the **Create Service Request** button. Note that this button is only available if there are no existing collections service requests. If the button is not available, you can create service requests on the Service tab. See Using the Service Tab for additional information.
6. The Create Service Request drawer opens with the following information pre-populated:
   - **Category:** Collections
   - **Account:** This field is populated with the Fusion account.
   - **Billing Account:** If you are viewing a billing account, this field is automatically populated with the billing account ID.
   - **Primary Contact:** This field is populated with the primary contact associated with the Fusion account.
7. Complete any remaining fields that are required for your service request, and click Create.
8. The drawer closes and the Service Request Details form is displayed. See Creating a Service Request in the Using Service Center in the Redwood Experience Guide for additional information about creating and managing service requests.
9. When you return to Account 360, the service request is now available in the Debt Summary drawer and in the Service tab. You can complete these actions:
   - Click the **Assign to Me** button at the far right of the record to assign the service request to yourself.
   - Click the **Edit** button to add or edit billing account, premise, and service agreement associations. See Editing Billing Accounts on a Service Request for details.
   - Click the hyper-linked name of the service request to open the request in Oracle Fusion Service. See Using Service Center in the Redwood Experience Guide for additional information.

Managing Activities

The activities that are displayed in the Overview tab depend on whether you are viewing a Fusion account or a billing account.

When viewing a Fusion account, the activities are a subset of the activity stream that is available in Oracle Fusion Sales, and the Activities panel includes:

- **Pending:** This section displays one record, which is the latest activity that is overdue or due in the future.
- **Recent:** This section shows the last 5 activities completed for the account.

When viewing a billing account, the activities are a subset of the activity stream in your CIS, and the Activities panel includes the last 10 activities.

To view the complete activity stream associated with the account you are viewing, click the **View All Activities** link at the bottom of the screen. The system opens the Activities drawer where you can view and manage the related activities.

You can also click on individual activities, either in the Account 360 Overview tab or in the Activities drawer, to open the activity in it's related system. When you have finished working with the activity record, you can save your changes and return to the Account 360 Overview tab.

See the Oracle Sales Help Center for additional information about working with Fusion accounts and activity records.

See "Activities" in the Business User Guide associated with your CIS system, available in the Oracle Utilities Help Center for additional information about working with activity records associated with a billing account.

View Account Activities

To view account activities:

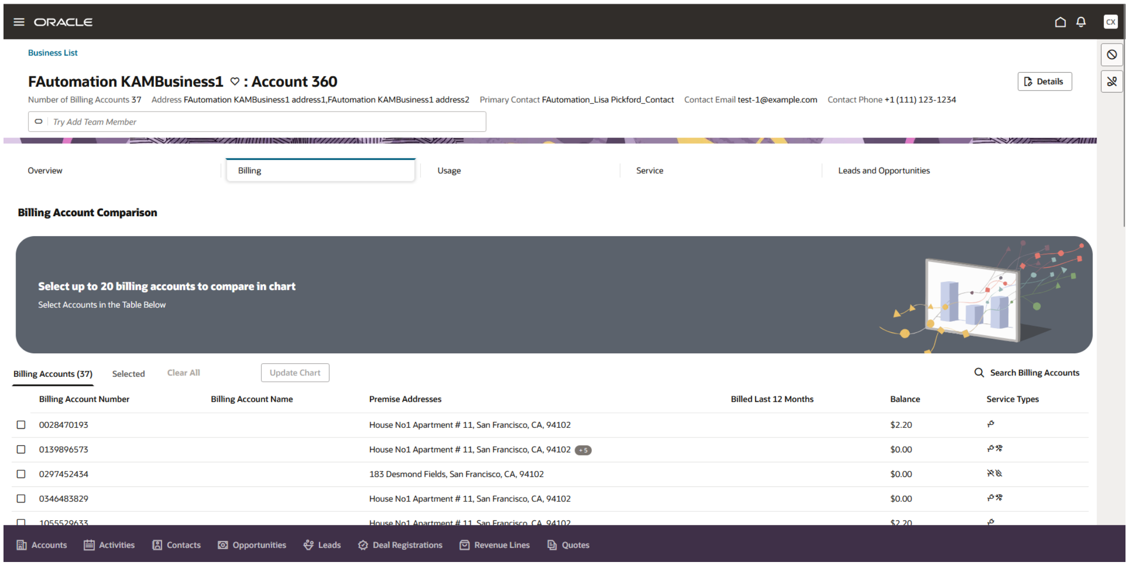
1. Access Account 360 for your account. Optionally, you can then search for and select a billing account. The remaining steps are applicable regardless of whether you are viewing a Fusion account or a billing account.
2. Click the Overview tab.
3. View the records in the Activities section.
4. To view additional activities and manage activities, click the **View All Activities** link.
5. The system opens the Activities drawer.
6. Use the filter fields at the top of the drawer to narrow your list by activity type or date range.
7. Review the list and click on individual activities as needed to view and manage activity details.
8. Depending on the activity you select, the system opens the activity in the source system or relevant drawer. For example:
   - Clicking on a service request activity opens the service request in edit mode in Oracle Fusion Service.
   - Clicking on a bill activity opens the Bill drawer in Account 360.
   - Clicking on a case activity opens the case in your CIS.
9. Update your activity as needed and then save your changes.
10. Return to Account 360 to continue working.

Using the Billing Tab

You access the Billing tab by selecting an account from the Business list, and then selecting the Billing tab. On initial entry, the Billing tab displays the Billing Account Comparison section. If your key account has fewer than 20 associated billing accounts, the chart is automatically displayed. If there are more than 20 billing accounts, you must select 20 or fewer accounts to render the chart.

This image shows an example of the Billing Account Comparison section with a key account that has more than 20 associated billing accounts:

Figure 5-14 Billing Tab



Topics in this section include:

- Using Billing Comparison Charts
- Viewing the Billing History Chart and Bill Segment Details
- Viewing Financial History

Using Billing Comparison Charts

You can select billing accounts from the list of records, or you can search for specific billing accounts to build a comparison chart.

To compare billing information in a chart:

1. Access Account 360 for your key account and then click the Billing tab.
2. In the work area of the screen, a list of associated billing accounts appears below the banner message or chart. The number of associated billing accounts is displayed next to the **Billing Accounts** field.
3. If all billing accounts are not displayed, scroll down to continue loading records in the billing account list.
4. Using the check boxes at the beginning of each record, select the accounts you want to compare in the chart. As you select billing accounts, the **Selected** field displays the number of accounts you have selected. You can select up to 20 billing accounts for comparison.
5. When you have selected the billing accounts you want to compare in the chart, click the **Update Chart** button.

> **Note**
>
> You can also select billing accounts by clicking **Search Billing Accounts** at the top of the list. Use the Select Billing Accounts window to search for and select the billing accounts you want to compare in the chart, and then click the **Update Chart and Close** button.
>
> Additionally, search queries in the Select Billing Accounts window typically require an exact match. The premise address search is limited to the ***primary*** premise associated with the billing account. You can use wildcards to query on Address Line 1 of the premise address. For example, searching using **%main** will return all billing accounts where "main" is in the Address Line 1 field of the primary premise associated with the account in your customer information system.

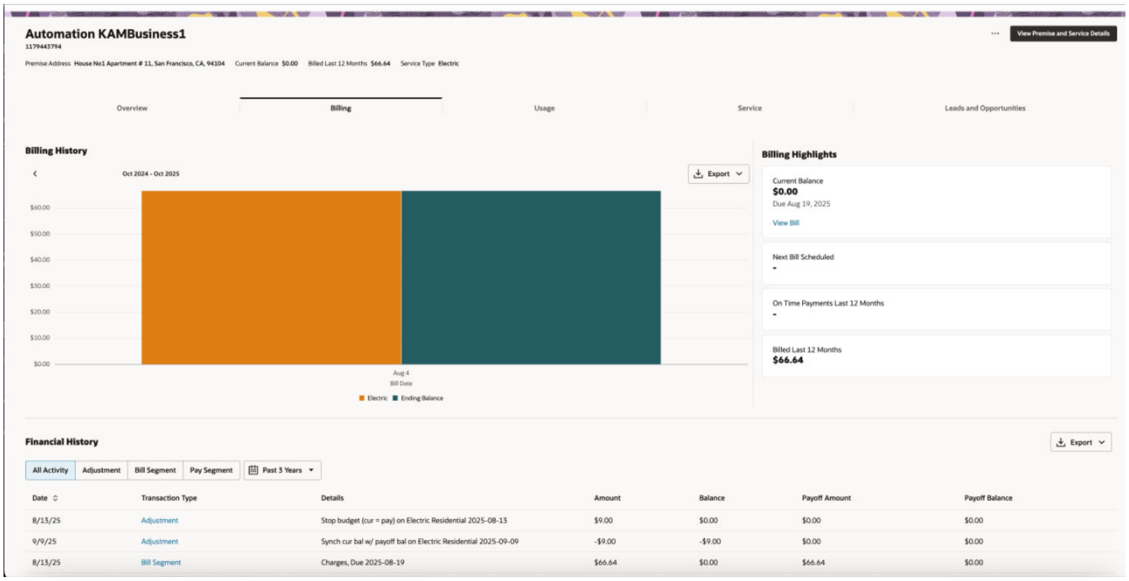
6. The chart is displayed, showing billing data for the current year for each selected billing account. You can:
   - Use the **<** and **>** buttons above the chart to view data for different years. Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.
   - Hover over a bar to view dates, service types, and billing amount details.
   - Click on a bar to display detailed billing data for the billing account.
7. To export the chart data, click the Export button above the chart. See Export Data from Account 360 for additional details.

Viewing the Billing History Chart and Bill Segment Details

To answer customer inquiries or determine how to best service a customer, you might need to view information about their utility bills. Once you have accessed a billing account, you can view the billing history chart to analyze billing history data and trends. If you select a single active or inactive billing account from the Billing Account Comparison chart or you use the Select Billing Account smart action to select an account, the Billing Tab displays billing information that is specific to the selected billing account.

This image shows an example of the Billing tab after you select a single billing account:

Figure 5-15 Billing History Chart



Billing account information is displayed in the following sections:

- **Billing History:** This section of the Billing tab displays a chart that represents the billing history for the selected account. For each bill period, there are two bars. The first bar can include multiple sections, which represent the amounts associated with each service type included on the bill. The second bar represents the ending balance for that bill. You can use the arrows above the chart to scroll through different date ranges.
- **Billing Highlights:** This section of the Billing tab displays the following items for the selected billing account:
  - **Current Balance:** This card identifies the current balance on the billing account, specifies when the balance is due, and provides a link to view the bill details. If the account is no longer active, the card displays the date the service contract ended and a link to view the last bill.
  - **Next Bill Scheduled:** This card identifies the date of the next scheduled bill.
  - **On Time Payments Last 12 Months:** This card displays the percentage of payments that were made on time in the last 12 months for the selected billing account.
  - **Billed Last 12 Months:** This card displays the amount that has been billed to the selected billing account over the last 12 months, and provides a year-over-year insight to compare the amount to the previous 12 months.
- **Financial History:** This section of the Billing tab displays a record for each bill, payment, and adjustment associated with the billing account over the selected time period. You can view all financial history records, or filter the list to display only bills, payments, or adjustments. You can also specify a time period to display. When you click on a record in this list, the system displays detailed information about the transaction.

View the Billing History Chart

To view the Billing History Chart:

1. Access the billing account you want to view.

2. In the Billing History section of the Billing tab, use the **<** and **>** buttons above the chart to view the desired date range. Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.
3. Hover over a bar to view dates, service types, and billing amount details.
4. Click on a bar to view billing details.
5. To export chart data, click the **Export** button. See Export Data from Account 360 for additional details.

Viewing Financial History

To answer customer inquiries, or determine how to best service a customer, you might need to view information about the account's billing and payment history. To view financial history, you must select a billing account on the Billing tab. You can then view payment, bill, and adjustment history for the billing account.

By default, all financial history records are displayed in the Financial History list. You can use the filter fields above the list to narrow the results to the type of record or to a specific date range. To view details about a record, click on the hyperlink in the Transaction Type column.

View Financial History Details

To view financial history details:

1. Access the billing account you want to view.
2. Search for and locate a financial history record in the Financial History section. To locate a specific record, you can use the following filters:
   - All activity
   - Bills
   - Payments
   - Adjustments
   - Date Range: By default, the financial history date range is set to "All time" and includes all financial history through the configured range. To specify a custom date range, click on the Calendar, click **Select Custom Date**, enter your date range and then click **Submit**.

   > **Note**
   >
   > The range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

3. The system updates to records in the list to reflect your filter selections.
4. Click on the hyperlink in the **Transaction Type** column.
5. The system displays one of the following drawers on the right side of the screen, depending on the transaction type of the selected record:
   - Payment drawer
   - Adjustment drawer
   - Bill drawer

6. Review the financial information, then close the drawer by clicking the **X** at the top.
7. Continue on to one of the next topics to understand the detailed information in the drawers.

Topics in this section include:

- Viewing Payment Details
- Viewing Adjustment Details
- Viewing Bill and Bill Segment Details

Viewing Payment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific payment that was made. You can access payment history details from the Billing tab.

To view payment details:

1. Access the billing account associated with the payment you want to view.
2. Click on a payment record in the Financial History section.
3. The system displays the Payment drawer on the right side of the screen, which includes:
   - Payment Tender
   - Payment ID
   - Payment Amount
   - Payment Status
   - Payment Date
   - Payment Method
   - Payment Segment Distributions
   - Payment Segment cards
4. To close the Payment Detail drawer, click the **X** at the top.

Viewing Adjustment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific adjustment. You can access adjustment details from the Billing tab.

To view adjustment details:

1. Access the billing account associated with the adjustment you want to view.
2. Click on an adjustment record in the Financial History section.
3. The system displays the Adjustment drawer on the right side of the screen, which includes:
   - The status and title of the adjustment
   - Adjustment ID
   - Adjustment Date
   - Bill ID
   - Amount
   - Status

    - Last Bill Issued
    - Adjustment Type
    - Premise
    - Service Agreement
    - Financial Details
4. To close the Adjustment drawer, click the **X** at the top.

Viewing Bill and Bill Segment Details

To answer customer inquiries, or determine how to best service a customer, you might need to view detailed information about a specific utility bill. You can use the following methods to access bill and bill segment details from the Billing tab:

- Click on a bar in the Billing History chart.
- Click View Bill in the Current Balance card of the Billing Highlights section.
- Click on a bill record in the Financial History section.

After you select a bill, you can see detailed information about the bill as a whole, and you can select individual bill segments to view more granular detail. If there are fewer than 10 bill segments on a bill, each segment is listed. If there are 10 or more segments, the system groups the segments by service type. You can click on a segment or group of segments to see the detailed information.

View Bill and Bill Segment Details

To view bill and bill segment details:

1. Access the billing account associated with the bill you want to view.
2. Complete one of these actions to access bill details:
    - Click on a bar in the Billing History chart.
    - Click **View Bill** in the Current Balance card of the Billing Highlights section.
    - Click on a bill record in the Financial History section.
3. The system displays the Bill drawer on the right side of the screen, which includes:
    - Bill Issued Date
    - Bill ID
    - Bill Due Date
    - Bill Period
    - Number of Days in Period
    - Previous Balance
    - Total Payments
    - Total Adjustments
    - Total Current Billing Charges
    - Ending Balance for This Period
    - A card for each bill segment, or group of bill segments, included in the bill.

4. To view details about the bill segments included in the bill, click on a bill segment or bill segment group card. If there are more than 10 bill segments in the selected bill, the system groups the bill segments by service type, and displays segment group card instead of individual bill segment cards.
5. The system displays the Bill Segment drawer, which includes a search bar and a card for each of the selected bill segments. Information on the cards includes:
   - Bill Segment Name
   - Bill Segment ID
   - Status
   - Premise Address
   - Current Amount
   - Rate Plan Code
   - Service Quantity
   - A detailed list of the bill segment calculations
6. Use the search bar to locate and view other bill segments. Note that if you selected a bill segment group to access the Bill Segment drawer, you can only search for bill segments associated with that service type. You can search by address, rate plan, or amount.
7. Click the bill segment to open the bill segment detail. The system displays:
   - Segment Name
   - Segment ID
   - Premise Address
   - Status
   - Current Amount
   - Rate Plan Code
   - Service Quantity
   - Bill Segment Calculations
8. To return to the Bill Segment drawer, click the **<** button at the top.
9. To return to the Bill drawer, click the **<** button at the top again.
10. To close the drawer at any time, click the **X** at the top.

Using the Usage Tab

When you access Account 360, the Overview tab is selected by default. To view usage information, select the Usage tab, and then select the service type for which you want to view usage data. The data and layout of the Usage tab can differ, as follows:

- **Billing Account Comparison Chart:** If you are viewing an Oracle Fusion account that has 20 or fewer associated billing accounts, the system displays the Billing Account Comparison chart automatically.
- **Billing account selection area:** If you are viewing an Oracle Fusion account that has more than 20 billing accounts, the system displays a message instructing you to select up to 20 accounts to view the chart. You can select one or more account and then click the Update Chart button to render the chart.

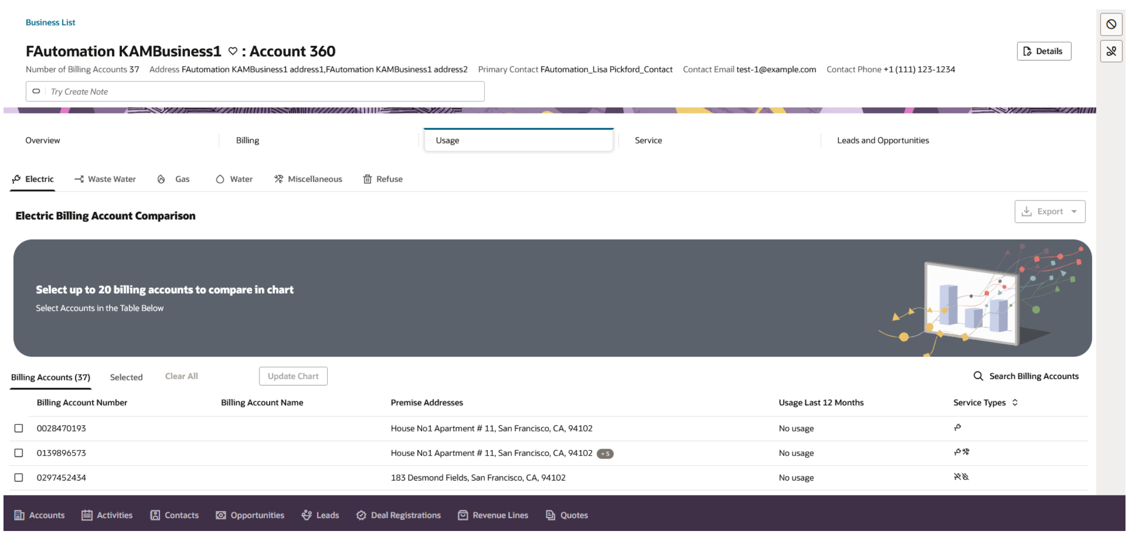
- **Service Contract Usage Map:** If you have navigated to a specific billing account, the Usage tab displays a map and lists the service contracts associated with the selected billing account.
- **Flat-fee services with no usage data:** If you are viewing billing accounts that have a flat-fee service that has no measurable usage, the usage tab will not display any data when viewing that service type. Additionally, your utility can configure the links on the Service Contract Usage Map for service contracts with no usage data to be disabled.

When viewing an Oracle Fusion account, the lower section of the screen displays detailed records for each billing account that includes data for the selected service type such as:

- Billing account name and number
- Premise Addresses: If there are multiple premises associated with a billing account, a badge appears next to the displayed address to note how many additional premises there are.
- Usage for the selected service type over the last 12 months
- Icons for each service type associated with the billing account
  Icons with a slash through them represent a service type that is not currently active, but was active within the configured range for historical data display. The date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

This image shows an example of the Usage tab when on the Account 360 view for a key account with more than 20 billing accounts:

Figure 5-16 Usage Tab



If you have already selected a single billing account using the Select Billing Account smart action in the header, the system displays only the Service Contract Usage Map, and does not include any additional detail below the map.

Topics in this section include:

- Using Usage Comparison Charts
- Using the Service Contract Usage Map

Using Usage Comparison Charts

If your Oracle Fusion account has fewer than 20 billing accounts, or you have selected the billing accounts you want to view and compare, the system renders your chart. Using tabs above the chart, you can specify which service type you want to view. You can also change the data that is displayed in the chart using these options that appear at the top of the chart:

- **Unit of Measure:** Use this filter to display chart data in a specific unit of measure. The filter displays all unit of measure options that are available for the selected service type and billing accounts.
- **Level of Detail:** Depending on the data that is available for the selected accounts, you can use a filter to display the chart by year or month. This option is disabled for service types that charge a flat fee, as the selected level of detail is the only level of detail available for that service type.
- **Date Range:** You can use the arrows above the chart to change the date range displayed in the chart. Click the arrow to the left of the date to see older data, and click the arrow to the right of the date to see more current data.

> **Note**
>
> By default, the system displays the most current data when you first access the chart. Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.

This image shows an example of the Usage Comparison chart for multiple billing accounts:

Figure 5-17 Usage Comparison Chart

Compare Usage Data

To compare usage information in a chart:

1. Access Account 360 for your key account and then click the Usage tab.
2. If the account has 20 or fewer billing accounts, the usage chart is automatically displayed. Skip to step 6.

If the account has more than 20 billing accounts, a list of associated billing accounts appears below the banner message, and the number of associated billing accounts is displayed next to the Billing Accounts field.

If all billing accounts are not displayed, scroll down to continue loading records in the billing account list. You can also select billing accounts by clicking **Search Billing Accounts** at the top of the list. Use the Select Billing Accounts window to search for and select the billing accounts you want to compare in the chart, and then click the **Update Chart and Close** button.

Be aware that search queries in the Select Billing Accounts window typically require an exact match. The premise address search is limited to the ***primary*** premise associated with the billing account. You can use wildcards to query on Address Line 1 of the premise address. For example, searching with **%main** will return all billing accounts where “main” is in the Address Line 1 field of the primary premise associated with the account in your customer information system.

3. Using the check boxes at the beginning of each record, select the accounts you want to compare in the chart.
4. As you select billing accounts, the **Selected** field displays the number of accounts you have selected. You can select up to 20 billing accounts for comparison.
5. When you have selected all of the billing accounts you want to compare in the chart, click the **Update Chart** button.
6. The chart is displayed, showing usage data for the current year for each selected billing account. You can:
   - Use the **<** and **>** buttons above the chart to view data for different years.
   - Hover over a bar to view additional usage details.
   - Click on a bar to display detailed usage data for the billing account.
7. To export the chart data, click the Export button above the chart.

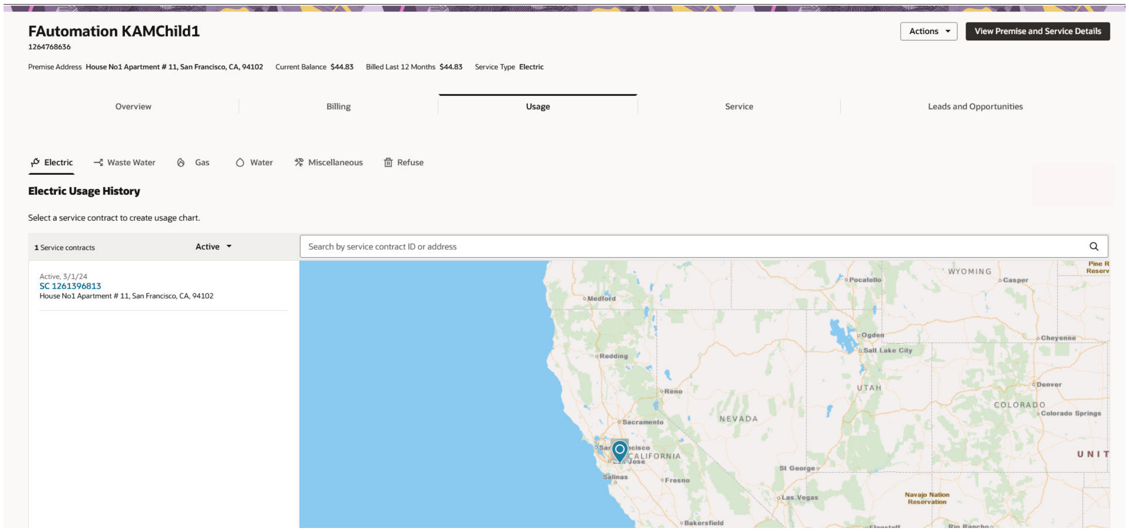
Using the Service Contract Usage Map

You can use the Service Contract Usage Map to view all active and inactive service contracts for a selected billing account on a map and access detailed usage history. To access the map, you first access Account 360 for your key account, then you search for and select an individual billing account. Then select the Usage tab to view the map.

By default, the map displays a list of active service contracts for the selected service type. You can use the drop down filter to display active or inactive contracts only, or to display all service contracts.

This image shows an example of the Service Contract Usage Map with the Electric service type selected:

Figure 5-18 Service Contract Usage Map



Each service contract associated with the account and service type is plotted on the map using the latitude and longitude of the premise address, and a list of the service contracts is displayed to the left of the map.

You can click within the map and narrow or move your focus to view service contracts in a specific area. You can also search for specific service contracts using the search bar and the filter options. When you enter search criteria, the map view narrows in on your search results. You can then click on a location in the map or a service contract in the list to view detailed usage data.

> **Note**
>
> Your utility can configure the Service Contract Usage Map so that links associated with flat-fee service contracts that have no usage data are disabled.

Topics in this section include:

- Viewing Usage History Data
- Viewing Usage Details for a Service Contract

Viewing Usage History Data

To view usage history for a service contract, complete one of these actions:

- Click on a pin in the map
- Click on a service contract from the list

> **Note**
>
> Your utility can configure the system to disable links associated with service contracts that are billed using a flat fee, and do not have any usage data. For this reason, some service contracts might not be clickable from this list or the map.

The system displays the Usage History chart for the selected service contract. Once you have navigated to the Usage History chart, you can change your view by:

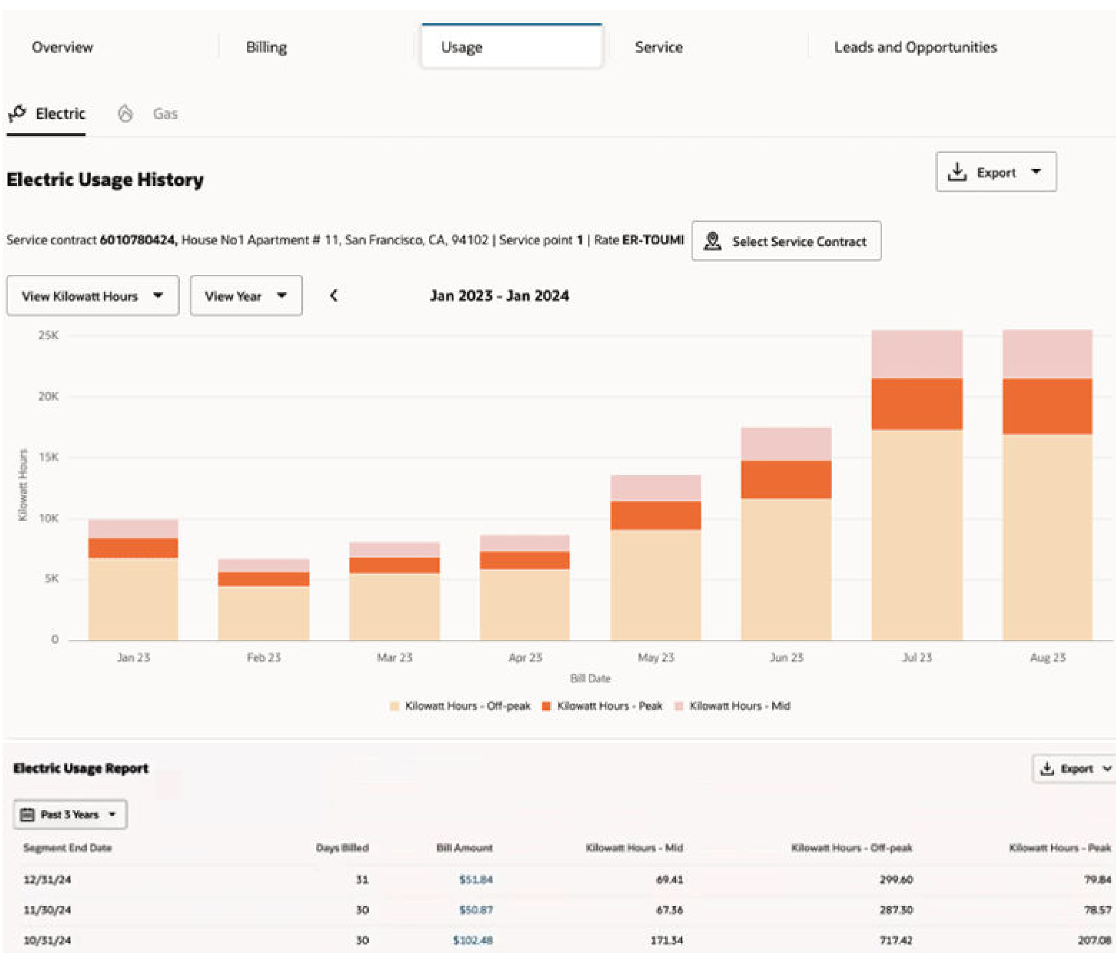
- Selecting a different unit of measure. For example, select Kilowatt Hours.
- Selecting a different usage interval. For example, select View Bill Period. This option might be disabled if you are viewing a flat-fee service contract, as there is only one available view.
- Use the **<** and **>** buttons to change the time period you are viewing.

> **Note**
>
> Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data. Click the Select Service Contract button to select and view a different service contract.

You can also view the service contract number, address, number of service points, and the rate code associated with the selected service contract. This information displays above the chart.

This image shows an example of the Usage History chart:

Figure 5-19 Usage History Chart



You can hover over a bar in the chart to view additional details in a tool tip, or you can click on a bar to change the chart view to a more granular view. For example, if you hover over a bar that represents a bill period, you can click on that bar to view a more detailed chart for that bill period. If available, the chart would then include a bar for each day in the bill period.

Note

You can only access a more detailed chart if the detailed data is available. For example, if hourly data is not available, you can't click on a bar that represents a day to display an hourly chart. Similarly, when viewing the chart for services that are billed using a flat-fee and do not have any usage data, this option is not available.

Below the chart, the Usage Report displays a list of detailed records about the usage for the selected service contract. You can click on the Bill Amount in any of the records to view the Bill Segment Drawer. You can also export the data in the list and change the date range of the displayed data. Be aware that the date range filter uses the ***billing date*** to determine which records to display.

See these topics for additional information:

- Viewing Bill and Bill Segment Details
- Exporting Data from Account 360

Viewing Usage Details for a Service Contract

Below the chart, the Usage Report displays a list of detailed records about the usage for the selected service contract. You can click on the Bill Amount in any of the records to view the Bill Segment Drawer. See Viewing Bill and Bill Segment Details for additional information.

To view usage details for a service contract:

1. Search for and select a billing account, and then click the Usage tab.
2. The Service Contract Usage Map appears, and all associated service contracts are displayed as pins in the map, and in a list to the left of the map.
3. Click on a pin in the map, or on a service contract in the list.
   If you click on a pin that includes multiple service contracts, you will then need to click on the service contract you want to view from the Select a service contract window.

   Additionally, your utility can disable usage options for service contracts that are billed using a flat fee. Therefore, some service contracts might not be clickable, as there is not detailed usage data to view.
4. The system displays the Usage History chart in the work area.
5. Use these options to change your display:
   - Unit of Measure filter
   - View filter
   - Scroll left and right to display different date ranges
     Be aware that the date range available for viewing is determined by the Historical Data Range Profile Option set by your utility. By default, the Historical Data Range is set to allow you to view 3 years of data.
6. Hover over a bar to view usage details.
7. Click on a bar to display a more detailed chart.

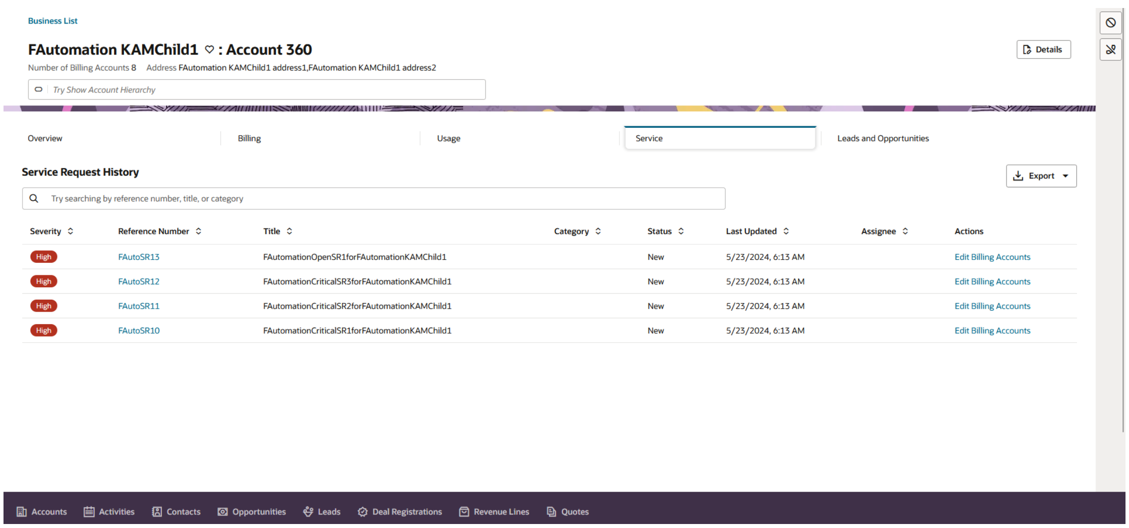
8. Scroll down to the **Usage Report** to view additional details about the service contract.
9. To view bill segment details, click on the **Billed Amount** column for a record in the report. See Viewing Bill and Bill Segment Details for additional information.
10. You can also change the date range of the displayed data, and export the data in the list. Be aware that the date range filter uses the ***billing date*** to determine which records to display. See Exporting Data from Account 360 for additional information.

Using the Service Tab

You can use the Service tab to view a list of resolved and unresolved service requests associated with a key account, filter service requests by reference number, title or category, or create a new service request.

This image shows an example of the Service tab when viewing an Oracle Fusion account:

Figure 5-20 Service Tab



You can search for service request by reference number, category, or title, and you can sort them by clicking the arrows in the following column headers:

- Severity
- Reference Number
- Title
- Category
- Status
- Last Updated
- Assignee

When you are viewing an Oracle Fusion account, you can also filter the service request list by billing account using the Smart Action bar to search for a billing account. After you select a billing account, only the requests associated with the selected billing account are displayed in the list. If you access the Service tab when you are viewing a specific billing account, the Smart Action bar is not available, but you can use the Action menu to create a service request for that billing account.

You can use the Smart Action bar to complete the following service-related actions:

- **View Work Queue:** This option navigates you away from Account 360 and displays the Work Queue.
- **Create Service Request:** This option opens the Create Service Request drawer, where you can create a service request for your Oracle Fusion account.

See these topics for additional information about the Smart Action bar and Action menu options:

- Using Smart Actions from Account 360
- Using the Account 360 Action Menu Options

You can also click on the hyperlink in the Reference Number column of an existing service request to access it in the Oracle Fusion Service system. The system opens the service request in Oracle Fusion Service, where you can view and edit information. When you are done updating the service request, save your changes and use the browser back button to return to Account 360.

Topics in this section include:

- Editing Billing Accounts on a Service Request

Editing Billing Accounts on a Service Request

You can add billing accounts, premises, and service points to a service request to ensure that the details of the request are associated with the correct entities.

For additional information about viewing or editing service requests in Oracle Fusion Service, see Service Requests in the Using Service Center in the Redwood Experience Guide

To add, edit, or remove billing accounts, premises, or service points to a service request, use one of the following methods to access the Edit Billing Accounts page.

From Account 360

1. Accessing the service request you want to edit on the Service tab of Account 360.
2. Click the **Edit Billing Accounts** link in the Action column.
3. The system opens the <Service Request Title>: Billing Accounts form in Oracle Fusion Service.
4. Complete the steps listed in the next task and then use your browser Back button to return to Account 360.

From a Service Request in Oracle Fusion Service

1. Access the service request in Oracle Fusion Service.
2. Using the Smart Action bar at the top of the screen, type and then select **Edit Billing Accounts**.
3. Complete the steps listed in the next task, save your changes, and then return to the service request.

- Manage Billing Accounts, Premises, and Service Points

Manage Billing Accounts, Premises, and Service Points

You can add or remove billing accounts, premises, or service points to entities within the Customer Experience for Utilities Sales solution, including:

- Service requests
- Leads
- Opportunities

To add items, you must use the hierarchical order shown here:

- Billing Accounts
  - Premises
    - Service Points

For example, if you want to add a premise to a service request, you must first add the associated billing account, and then you can add the premise as a child of that billing account. Similarly, if you want to add a service point, you must first add the billing account and premise, and then you can add the service point as a child of the premise.

When you remove an item, you remove the item, and all child records that are below it.

Add, Edit or Remove Items

To add, edit, or remove billing accounts, premises, or service points:

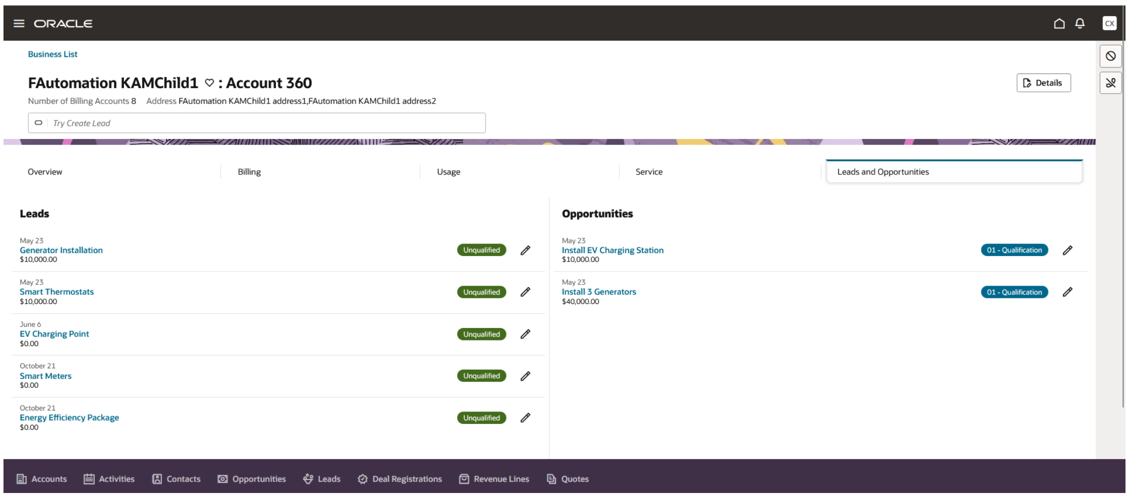
1. Access the <Entity Page Title>: Billing Accounts form. Your navigation to this form is determined by the entity you are adding billing accounts to.
2. Click the **Add Billing Accounts** button at the top right of the screen.
3. Search for and select the billing accounts you want to attach to the record, and click **Add and Close**.
4. The system returns you to the main form with the billing accounts in the list.
5. To add a premise as a child record under a billing account, click the Action menu (...) to the right of the billing account, and then click **Add Premise**.
6. Search for and select the premises you want to add to the record, and then click **Add and Close**.
7. The system returns you to the main form with the premises added as children of the selected billing account. You can expand or collapse the hierarchy as necessary.
8. To add a service point as a child record under a premise, click the Action menu (...) to the right of the premise, and then click **Add Service Point**.
9. Search for and select the service points you want to add to the record, and then click **Add and Close**.
10. The system returns you to the main form with the service points added as children of the selected premise. You can expand or collapse the hierarchy as necessary.
11. To remove a record from the hierarchy, click the Action menu (...) to the right of the record you want to remove, and then click Remove. Note that if you are removing an item with children, your selected record and all associated child records will be removed.
12. On the confirmation message, click **Continue**.

Using the Leads and Opportunities Tab

You can use the Leads and Opportunities tab in Account 360 to get an at-a-glance view of the sales leads and opportunities associated with an account. This tab includes all of the leads and opportunities for the account or billing account you are viewing.

This image shows an example of the Leads and Opportunities tab:

Figure 5-21 Leads and Opportunities Tab



Each lead or opportunity record displays the date on which it was created, the amount (if available), the primary contact, and the status. Statuses for a lead can include:

- Unqualified
- Qualified
- Converted
- Retired

Statuses for opportunity records come from the Oracle Redwood Sales system, and reflect the sales stage of the record.

If you are viewing an Oracle Fusion Account, you can use the Smart Action bar in the header of the screen and type in Create Lead or Create Opportunity. Selecting one of these options opens a drawer where you can quickly create your record. If you are viewing a billing account, you can use the Action menu in the header of the screen to create additional leads and opportunities.

To view detailed information or manage the lead or opportunity, click on the hyper-linked name of the lead or opportunity to view and manage it in Redwood Sales.

For each record listed on the tab, you can complete the following tasks:

- Click on the hyperlink name of the lead or opportunity to view the record in Oracle Redwood Sales.
- Hover over the primary contact to view contact details.

- Use the Edit icon to edit the billing accounts associated with the record. This option enables you to associate multiple billing accounts, premises, and service points with the lead or opportunity.

> **Note**
>
> All lead and opportunity management is done within Redwood Sales. This includes qualifying leads, converting leads to opportunities, and retiring records.

See the following topics in this guide for additional information about creating leads and opportunities:

- Using Account 360 Action Menu Options
- Creating a New Lead
- Creating a New Opportunity

See the Using Sales in the Redwood Experience Guide for additional information about editing and managing lead and opportunity records.

Topics in this section include:

- Editing Billing Accounts on a Lead or Opportunity

Editing Billing Accounts on a Lead or Opportunity

You can add billing accounts, premises, and service points to a lead or opportunity to ensure that the details of the request are associated with the correct entity.

For additional information about viewing or editing leads and opportunities in Oracle Fusion Sales, see the Oracle Sales Help Center.

To add, edit, or remove billing accounts, premises, or service points, use one of the following methods to access the Edit Billing Accounts page.

From Account 360

1. Access Account 360 and then select the Leads and Opportunities tab.
2. Click **Edit** icon next to the lead or opportunity you want to update.
3. The system opens the <Lead or Opportunity Title>: Billing Accounts form in Oracle Redwood Sales.
4. Complete the steps listed in the next task and then use your browser back button to return to Account 360.

From the Lead or Opportunity in Oracle Sales

1. Access the Lead or Opportunity in Oracle Sales.
2. Using the Smart Action bar at the top of the screen, type and then select **Edit Billing Accounts**.
3. Complete the steps listed in the next task and then use your browser back button to return to the lead or opportunity.

- Manage Billing Accounts, Premises, and Service Points

Manage Billing Accounts, Premises, and Service Points

You can add or remove billing accounts, premises, or service points to entities within the Customer Experience for Utilities Sales solution, including:

- Service requests
- Leads
- Opportunities

To add items, you must use the hierarchical order shown here:

- Billing Accounts
  - Premises
    - Service Points

For example, if you want to add a premise to a service request, you must first add the associated billing account, and then you can add the premise as a child of that billing account. Similarly, if you want to add a service point, you must first add the billing account and premise, and then you can add the service point as a child of the premise.

When you remove an item, you remove the item, and all child records that are below it.

Add, Edit or Remove Items

To add, edit, or remove billing accounts, premises, or service points:

1. Access the <Entity Page Title>: Billing Accounts form. Your navigation to this form is determined by the entity you are adding billing accounts to.
2. Click the **Add Billing Accounts** button at the top right of the screen.
3. Search for and select the billing accounts you want to attach to the record, and click **Add and Close**.
4. The system returns you to the main form with the billing accounts in the list.
5. To add a premise as a child record under a billing account, click the Action menu (...) to the right of the billing account, and then click **Add Premise**.
6. Search for and select the premises you want to add to the record, and then click **Add and Close**.
7. The system returns you to the main form with the premises added as children of the selected billing account. You can expand or collapse the hierarchy as necessary.
8. To add a service point as a child record under a premise, click the Action menu (...) to the right of the premise, and then click **Add Service Point**.
9. Search for and select the service points you want to add to the record, and then click **Add and Close**.
10. The system returns you to the main form with the service points added as children of the selected premise. You can expand or collapse the hierarchy as necessary.
11. To remove a record from the hierarchy, click the Action menu (...) to the right of the record you want to remove, and then click Remove. Note that if you are removing an item with children, your selected record and all associated child records will be removed.
12. On the confirmation message, click **Continue**.

6

Viewing Utility Data in the Redwood Sales Dashboard

Your system administrator can set up your system so that utility data is available directly from the Sales Dashboard, which is part of the Oracle Fusion Redwood Sales system. The utility items that can be made accessible from the Sales Dashboard include:

- A **Utility Accounts** tab at the bottom of the screen that navigates the user to the Business List.
- The **Top Overdue Accounts** panel, which appears on the My To-Dos tab.
- **Outage Data**, which appears on the Service tab.
- The **Upcoming Renewals** panel, which appears on the Pipeline tab.

> **Note**
>
> These options are available only to utilities users with the Key Account Manager role who have access to the Sales Dashboard in Oracle Redwood Sales, and only if the administrator has completed all of the required setup that is included in the Implementing CX for Utilities Guide. Additionally, the name of the screen might be updated to "Utility Sales Dashboard", denoting that the screen has been updated to include utility data.

For additional information about the Sales Dashboard, see How do I configure the Sales Dashboard in the Redwood User Experience?

Accessing the Utility Sales Dashboard

To access the Utility Sales Dashboard:

1. From the Oracle Header, click the menu button.
2. In the Redwood Sales section, click the Utility Sales Dashboard option.
3. The Utility Sales Dashboard opens with the My To-Dos tab displayed.
4. Continue to one of the topics in this chapter to view and manage utility details from the Utility Sales Dashboard.
5. To return to Business List in Customer Experience for Utilities Sales, click the Utility Accounts tab at the bottom of the screen.

In this chapter:

- Viewing Top Overdue Accounts
- Viewing Outage Data for Your Accounts
- Viewing Upcoming Renewals

Viewing Top Overdue Accounts

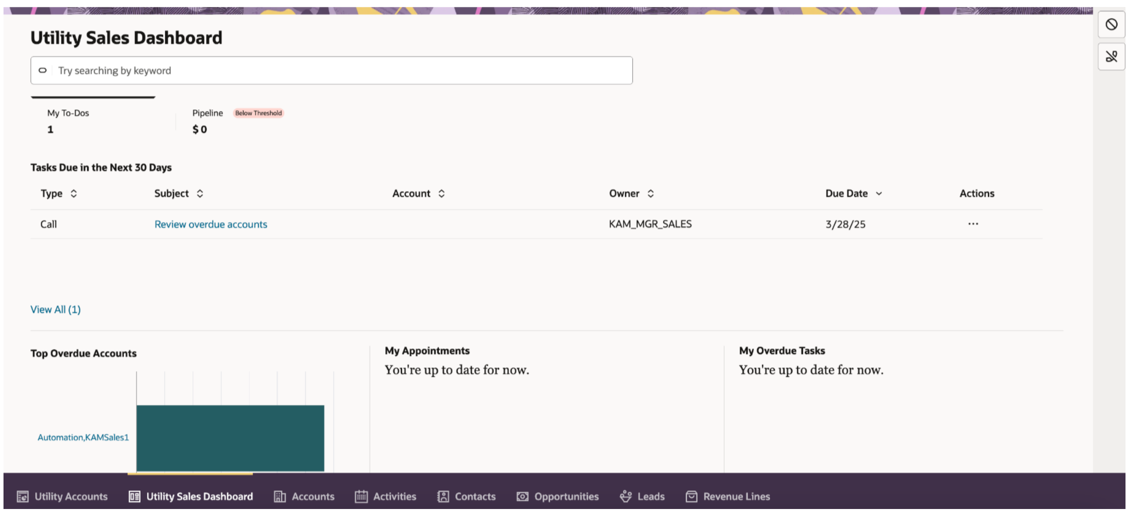
When a Key Account Manager accesses the Redwood Sales Dashboard, the screen is named "Utility Sales Dashboard" and they can view their top overdue accounts in the Top Overdue Accounts panel, which appears on the My To-Dos tab.

This panel displays up to ten Oracle Fusion accounts assigned to the logged-in user with the highest overdue balances. The overdue balance is the total of all overdue amounts from all of the billing accounts associated with the Oracle Fusion account. If there are no accounts with overdue balances, this section will be empty.

You can hover over a bar in the chart to see the overdue amount, or you can click on a bar to open the Debt Summary drawer in Account 360. You can then use the Back button in your browser to return to the Utility Sales Dashboard.

This image shows an example of the My To-Dos tab of the Utility Sales Dashboard:

Figure 6-1 Utility Sales Dashboard



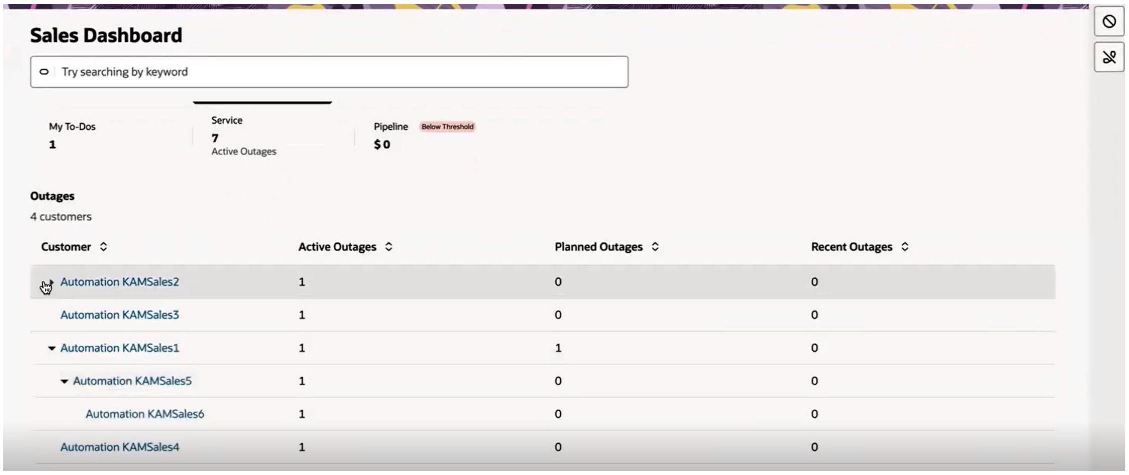
Viewing Outage Data for Your Accounts

When a Key Account Manager accesses the Redwood Sales Dashboard, the screen is named "Utility Sales Dashboard" and they can view service outage data, which appears on the Service tab.

This panel displays active, planned, and recently restored outages for the parent business accounts associated with the logged in user. You can then you can drill down into the accounts to view outage data associated with child accounts.

Clicking on any of the hyperlinks in the rows that have an outage will open the Outage details drawer. See Managing Outages for detailed information about how to view and manage outage data.

This image shows an example of the Service tab of the Utility Sales Dashboard:



Note

The outage count that is displayed in the Service tab header of the Redwood Sales Dashboard includes all outages that impact the parent and the child accounts. Therefore, you might need to expand all of the nodes in the detail area of the form in order to see the number of outages that appears in the outage count. Using the example above, you would need to expand the Automation KAMSales1 node in order to see two outages associated with it's child accounts. Without expanding the node, it might appear that there are only 5 outages in the detail area, while the outage count is 7.

Viewing Upcoming Renewals

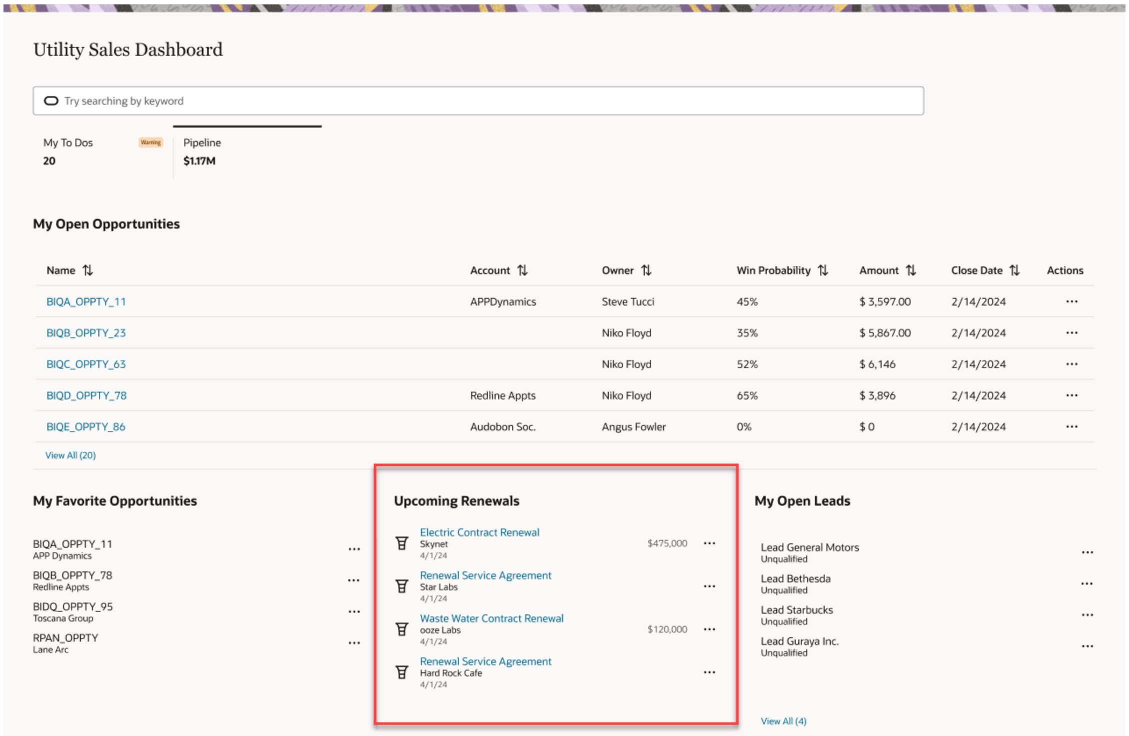
When a Key Account Manager accesses the Utility Sales Dashboard, they can view their accounts that are coming up for renewal soon using the Upcoming Renewals panel, which appears on the Pipeline tab. This panel displays open opportunities with the type of RENEW that are assigned to the logged-in user.

You can complete these actions from the panel:

- Click on the opportunity name to access the opportunity details in Redwood Sales.
- Click on the View All link at the bottom of the list to see all of your open opportunity records in Redwood Sales. By default, the RENEW filter is set to show only those opportunities associated with contract renewals.
- Click on the Action menu icon on an opportunity, and complete one of these tasks in Redwood Sales:
  - Edit the opportunity
  - Send an email
  - Create a task
  - Create an appointment
  - Create a note
  - Edit billing accounts

This image shows an example of the Upcoming Renewals panel:

Figure 6-2 Upcoming Renewals Panel



For additional information about:

- Working with opportunities in Redwood Sales, see the Oracle Sales Help Center
- Editing billing accounts, see Editing Billing Accounts on a Lead or Opportunity