# Oracle Utilities: Customer Care & Billing v2.6 Overview Ed 2

Oracle Utilities

| DURATION | MODULES | COURSE CODE |
| --- | --- | --- |
| 2 Days | 5 Lectures | — |

## Course Overview

This Oracle Utilities: Customer Care and Billing v2.6 Overview training gives you an overview of the structure and functionality of Oracle Utilities Customer Care and Billing system. Learn from expert Oracle University instructors.

## What You Will Learn

### Introduction to Customer Care and Billing

- Objectives
- Architecture Summary
- Oracle Utilities Application Framework
- System Scope
- Object-Oriented Architecture and the “V” Diagram
- Quiz
- Practice 1-1: Logging In to Customer Care and Billing
- Control Central
- The Anatomy of All Pages
- Practice 1-2: Exploring the Anatomy of All Pages
- Practice 1-3: Viewing Information in the Object Display Area
- Quiz
- Control Central
- Search Buttons
- Practice 1-4: Searching Within Customer Care and Billing
- Account Information Page + Dashboard = 360-Degree View of the Customer
- Navigating Customer Care and Billing
- Practice 1-5: Navigating Customer Care and Billing
- Control Central Tree Functionality
- Practice 1-6: Navigating Using Control Central Trees
- Navigating Through Menu and Admin
- Practice 1-7: Navigating Using Menu and Admin

- Quiz
- Portals and Zones
- Practice 1-8: Navigating Using Portals and Zones
- Extending Customer Care and Billing Functionality
- Quiz
- Summary

## Maintaining Customer Information

- Objectives
- The “V” Diagram
- Customer = Person and Account
- Important Person Concepts
- Practice 2-1: Exploring the Person
- Quiz
- Important Account Concepts
- Practice 2-2: Exploring the Account
- Quiz
- Practice 2-3: Adding a Person and Account
- Premise and Service Point
- Important Premise Concepts
- Practice 2-4: Exploring the Premise
- Important Service Point Concepts
- Metered Service Points
- Badged Item Service Points
- Unbadged Item Service Points
- Two Ways to Handle Area Lights: Badged or Unbadged
- Practice 2-5: Exploring the Service Point
- Quiz
- Practice 2-6: Adding a Premise with Service Points
- Important Service Agreement Concepts
- An Account Must Have a Service Agreement for Every Service That Is Billed
- Some SAs Are Linked to Premises Via SPs
- Some SAs Are Not Linked to Premises
- Practice 2-7: Exploring the Service Agreement
- Quiz
- Most SAs Are Created Via Start Service
- Two SAs, Each Linked to a Single SP (A Normal Single Family Residence
- Scenario)
- Start Options Control Default Values
- Service Agreement States
- Activating Pending Start SAs
- Practice 2-8: Starting Service
- Important Stop Service Concepts
- Customer Contacts
- Overview of Customer Contact

- Practice 2-9: Adding a Customer Contact
- Summary

## Meters and Meter Reads

- Objectives
- Review: Service Points Define Services at a Premise
- Review: There Are Three Types of Service Points
- Review: Metered Service Points
- Meter ERD
- A Meter’s Registers Measure How Much Was Used
- Every Register Has Many Attributes
- Practice 3-1: Exploring the Meter
- Practice 3-2: Adding Meters into Inventory
- Practice 3-3: Searching for Meters
- Important Meter Read Concepts
- A Configuration’s Registers Are Read
- Subtractive Versus Consumptive Registers
- Meter Read ERD
- Practice 3-4: Exploring Meter Reads
- Practice 3-5: Viewing Historical Meter Reads
- Important SP/Meter Installation Concepts
- Adding Meter Reads
- Practice 3-6: Searching for Meters
- Quiz
- Summary

## Field Activities

- Objectives
- Important Field Activity Concepts
- Field Activities
- Field Activity ERD
- Field Activity State Transition
- Practice 4-1: Exploring Field Activities
- Practice 4-2: Completing a Pending Field Activity
- Activating Pending Start SAs
- Practice 4-3: Activating Pending Start Service Agreements
- Quiz
- Summary

## Financial Transactions

- Objectives
- Important Financial Transaction Concepts
- FTs Determine an Account’s Balance
- Every FT Contains Current Amount and Payoff Amount
- Current Balance Versus Payoff Balance

- When Current Balance ≠ Payoff Balance
- Financial Transaction Status
- FTs Affect More Than Balances
- Practice 5-1: Determining Current and Payoff Balances
- How Old Is the Debt?
- Practice 5-2: Determining Debt Age
- Practice 5-3: Viewing Historical Financial Transactions
- Practice 5-4: Exploring the Financial Transaction Page
- Quiz
- Important Billing Concepts
- Bill ERD
- Definitions
- Bill Lifecycle
- Practice 5-5: Creating a Bill Online
- Bill Segments Create FTs
- Practice 5-6: Examining a Bill Segment’s Financial Transactions
- Bill Segment Lifecycle
- Bill Segment Lifecycle Descriptions
- Practice 5-7: Freezing Bill Segments and Completing the Bill
- Practice 5-8: Canceling and Rebilling a Bill Segment (Optional)
- Practice 5-9: Creating Another Bill Online
- Quiz
- Important Payment Event Concepts
- A Payment Event Can Have Many Payments and Tenders
- Payment Segments Create FTs
- Practice 5-10: Exploring a Payment Event
- Practice 5-11: Adding a Payment Event
- Practice 5-12: Searching for Payments and Tenders
- Quiz
- Additional Payment Topics Covered in Other Oracle University Courses
- Important Adjustment Concepts
- Adjustments Create FTs
- Practice 5-13: Adding an Adjustment
- Quiz
- Summary
- Additional Customer Care and Billing Courses