

Fact Sheet - Customer Management

Billing systems are as often as not these days called "CIS Billing" - meaning **C**ustomer **I**nformation **S**ystem. A CIS system will have customer records that keep a history of contact with a customer (calls, correspondence, e-mail), their credit data such as credit rating or deposits, and theft and tampering history (for utilities). Other data could be as extensive as preferred language, banking data for direct debit, even preferred bill format and preferred bill delivery method, such as via e-mail rather than standard mail. Corporate customers may have extensive data relating to headquarters and branch locations, linked accounts or premises, and company representatives.

The customer record should be independent of any Account record, as the customer may have multiple accounts. Older-style billing systems focussed on the parcel or address (for property taxes) or the meter (for utility billing). Modern billing systems focus on the customer and the management of customer information. Among other things it means that when a customer moves to a new address all of the data already exists and does not have to be re-keyed. Because some data is non-standard, either between customers or between different cities or utilities, a number of user-defined fields should be available in the billing system to support this need.

A Customer is not necessarily a person or business who receives regular bills. They may be someone who is an irregular contact. Nevertheless the CIS Billing system should retain their data for use when required.