







[SF] Implement Energy Utility Console in OVO (RT00-10958)

 [RT00-11025] OVO Console - Customer Profile Card Created: 07/May/25 Updated: 29/May/25 Due: 22/May/25 Resolved: 23/May/25

Status:	Done
Project:	Retail Transformation
Components:	Salesforce - Sales & Service
Affects versions:	None
Fix versions:	RT Release 2.2
Parent:	[SF] Implement Energy Utility Console in OVO

Type:	Story	Priority:	Not Set
Reporter:	Nathan Batterham	Assignee:	Nathan Batterham
Resolution:	Done	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:  image-20250507-065434.png  image-20250507-065344.png  image-20250507-070808.png  image-20250507-070636.png  image-20250519-084142.png  {4099F684-42B8-4D4C-8888-990FE3A0FD53}-20250522-234648.png

Issue links:	<b>Bug Of</b>		
	has Bug	<a href="#">RT00-12295</a>	ST   Missing Customer Profile Card in...
	<b>Depends on</b>		
	is dependent on	<a href="#">RT00-11031</a>	OVO Console - Console Layout
	<b>Relates</b>		
	relates to	<a href="#">RT00-12295</a>	ST   Missing Customer Profile Card in...

Acceptance Criteria:	<b>AC1</b>
	Given I am a Agent/Team Lead/Business Admin
	When I log into Salesforce
	And I Access The Energy and Utilities Cloud Console
	And I navigate to an Account (Individual Or Consumer)
	Then I should see a Customer Profile Card on the top Left of the Console
	<b>AC2</b>
	Given I am a Agent/Team Lead/Business Admin
	When I log into Salesforce
	And I Access The Energy and Utilities Cloud Console
	And I navigate to an Individual Account
	Then I should see a Customer Profile Card containing the following details:
	<ul style="list-style-type: none"><li>• Customer Name (Preferred Name)</li><li>• Customer Type = Individual</li><li>• Date of Birth</li><li>• Mobile Phone</li><li>• Phone</li><li>• Email</li><li>• Mailing Address</li><li>• Link to View All Authorised Contacts</li></ul>
	<b>AC3</b>
	Given I am a Agent/Team Lead/Business Admin
	When I log into Salesforce
	And I Access The Energy and Utilities Cloud Console
	And I navigate to an Business Account
	Then I should see a Customer Profile Card containing the following details:
	<ul style="list-style-type: none"><li>• Business Name</li><li>• Customer Type = Business</li><li>• Mobile Phone</li><li>• Phone</li><li>• Email</li><li>• Mailing Address</li><li>• Link to View All Authorised Contacts</li></ul>

AC4

Given I am a Agent/Team Lead/Business Admin

When I log into Salesforce

And I Access The Energy and Utilities Cloud Console

And I navigate to an Account (Business or Individual)

And I click the link to View All Contact Partners

Then I should see a pop up with all authorised customers to this account eg

OverviewDetailsCustomer RelationshipsInteractionsRelatedPaym

All Contact Partners

Q Search

Name	Relationship	Email	Mobile
Geoff Geoffson Music	Authorised Contact	admin@music.com	0427 282 383

- Full Name of contact
  - Relationship (Authorised Contact or Power of Attorney)
  - Date of Birth
  - Email
  - Mobile
  - Phone
  - Reflect Name on Statements check box\*
- And When I click on the Name of that customer I should be redirected to the authorised Customer Account.

AC5

Given I am a Agent/Team Lead/Business Admin

When I log into Salesforce

And I Access The Energy and Utilities Cloud Console

And I navigate to an Account (Business or Individual)

And this account has no authorised customers

And I click the link to View All Authorised Contacts

Then I should see a pop up stating no related records:

No records to display

AC6

Given I am a Agent/Team Lead/Business Admin

And I log into Salesforce

And I Access The Energy and Utilities Cloud Console

And I navigate to an Account (Business or Individual)

When I successfully add an authorised contact

And I click on the View All Authorised Contacts link

Then details of the contact I just added are displayed in the table

\*Reflect Name on Statements checkbox is current OVO functionality that allows the contact name to appear on Invoices/Statement.


L2 Capability:	1.7 Customer Service
L3 Capability:	1.7.1 Customer Interaction Management
Story Points:	1
Sprint:	

RT Workstream:	Operations
Start date:	14/May/25
Linked Issues:	relates to

Description

This component introduces the detailed information for both Business and Consumer accounts, focusing on key attributes such as account name, mobile number, phone number, and address. For Consumer accounts specifically, additional details such as preferred name are also included, allowing for a more personalized experience.

For BFR this was achieved with a view only action:

 Customer Details

Name

Mr. John Brew

Email

claire.j.a.pedroso+thornburrycafe@accenture.com

Phone

Mobile

0404112501

Birthdate

1/10/1989


Deceased

☐


The scope of this ticket is to update to the console component:

Nathans Flower Shop


Business


 test2@nbflowershop.com

Unverified

 0434 567 890

Unverified

 (03) 5222 2222

 16 Elsie Gr MOUNT EVELYN VIC 3796 AUSTRALIA

[View All Contact Partners](#)

Note: Verification of the email and phone number wont be included.

Comments

Comment by <a href="#">Linda Popovic</a> [ 07/May/25 ]
Hey <a href="#">Nathan Batterham</a> - Have added Mailing address to AC2 and AC3. Have also added in DOB for AC2.
Have added a new AC6 around adding a contact and ensuring details then appear when you click View all contact partners hyperlink, noticed that there is no Relation: contact, do we need to remove this field, leaving it blank might be confusing? Also, can we add in the date of birth to display in the contact table?
Comment by <a href="#">Linda Popovic</a> [ 13/May/25 ]
AC's approved.
Comment by <a href="#">Avigail Hermosilla</a> [ 14/May/25 ]
Working on this in SO.
Comment by <a href="#">Yike Wang</a> [ 15/May/25 ]

Hello [Avigail Hermosilla](#) , the mobile and phone should be displayed follow rules in [ [RT00-4660](#) DONE ] Ability to have formatted Phone Number for Agent View - JIRA[<https://aglenenergy.atlassian.net/browse/RT00-4660>].

cc [Linda Popovic](#) , [Nathan Batterham](#) , [Justine Baldia](#) , [Arvie Marie Gaviola](#)

Comment by [Avigail Hermosilla](#) [ 16/May/25 ]

created a new PR <https://github.com/AGLEnergyDev/AGL.RetailNextPhase2.Salesforce.App/pull/2317>

cc. [Nathan Batterham Richmond Lofranco](#)

Comment by [Nathan Batterham](#) [ 18/May/25 ]

[Avigail Hermosilla](#) - this has been deployed to qa - can you please review befor handing over to testing,

FYI - made a few changes in the structure, your components are in the energy console package, and cloned the original components as I dont want any VPL (vlocity p included

Thanks!

Comment by [Avigail Hermosilla](#) [ 19/May/25 ]

Created a PR for update, <https://github.com/AGLEnergyDev/AGL.RetailNextPhase2.Salesforce.App/pull/2328>

-Added the Account mailing address for business account in LeftProfile flexcard

cc. [Nathan Batterham Richmond Lofranco](#)

Comment by [Avigail Hermosilla](#) [ 19/May/25 ]

Pr merged and done unit testing in QA as Agent, Teamlead, Business Admin User.

Business Account

Energy Utility Cons...Accounts

Wilbert Predovic | Ac...Chloe Store | Account

Chloe Store | Ac...Chance Cl...

Chloe Store

Business

(02) 3243 2424

(03) 2684 6456

zandrine.noveno@accenture.com

5288, L 11, APT 18, f1 42 Dalgarno Street ACCS, PO BOX 3138 Boggabri NSW 3032 Australia

View All Authorised Contacts

Action Launcher

Search actions...

Create CaseUpdate Business DetailsUpdate Address DetailsAdd Authorised Conta

DetailsCustomer RelationshipsInteractionsRelated

Account Summary

Customer Class	Business	Customer Number
Account Name	Chloe Store	ABN2025030402
Business Type	Pty Ltd	ACN250304002

Contact Information

Phone	0326846456	Mobile Phone	0232432424
Email	zandrine.noveno@accenture.com		

Individual Account

Energy Utility Cons...Accounts

Wilbert Predovic | Ac...Chloe Store | Account

Wilbert Predovic

Individual

21/11/1991

(02) 3532 2547

0446 454 448

justine.l.a.baldia@accenture.com

12, L 01, APT 1A, f1 76 Taltarni Road ACCS, PO BOX 2528 St Arnaud East VIC 3478 Australia

View All Authorised Contacts

Action Launcher

Search actions...

Create CaseUpdate Individual DetailsUpdate Address DetailsAdd Authorised Cont

DetailsCustomer RelationshipsInteractionsRelated

Account Summary

Customer ClassIndividual

NameMr. Wilbert P Predovic

Birthdate21/11/1991

Customer Number

Deceased

Vulnerable CodeWilbert

Contact Information

Phone0446454448

Emailjustine.l.a.baldia@accenture.com

Mobile Phone0235322547

All Authorised Contacts

All Authorised Contacts

Search

Name	Relationship	Date of Birth	Email	Mobile	Phone	Reflect
Chance Claybourne	Power of Attorney	14/02/1997	chance.claybourne@ma...	0456 465 456	0515 645 456	
Maria Elinav	Authorised	05/05/1993	mariaelinav@email.com	0456 345 324	(03) 4567 5423	

Business TypePty Ltd

ACN250304002

This is ready for system testing. [Michell Ann Pintor Justine Baldia](#)

cc.[Arvie Marie Gaviola](#)

Comment by [Nathan Batterham](#) [ 19/May/25 ]

[Linda Popovic](#) - as per the Solution doco I have updated the ACs saying View All Contact Partners to View All Authorised Contacts

Comment by [Justine Baldia](#) [ 20/May/25 ]

05/21: Test Update

- Task: Test Execution
- Status: In Progress
  - Executed: 3 out of 6
  - Passed: 3
  - Failed: 3
- Comment:
  - Created a bug (<https://aglenenergy.atlassian.net/browse/RT00-12295>) for the issue regarding Customer Profile Card suddenly did NOT appear in the Accounts u persona below, assigned to [Avigail Hermosilla](#).
    - CSA Test User
    - Team Lead Test User
    - Admin Test User
  - We will have to re-check the "PASSED" Test Cases when bug is fixed.

Cc: [Arvie Marie Gaviola](#) [Zandrine Cuevas](#) [Nathan Batterham](#)

Comment by [Justine Baldia](#) [ 22/May/25 ]

Hi Team, this has been validated in **QA** and **PASSED** . Kindly redirect for the test results on the links below for your review.

<https://aglenenergy.atlassian.net/si/jira.issueviews:issue-html/RT00-11025/RT00-11025.html>

5/6

RT00-11025\_qTest Test Evidence

Cc: [Linda Popovic](#) [Geoff Eagle](#) [Nathan Batterham](#) [Yike Wang](#) [Melissa Sison](#) [Arvie Marie Gaviola](#) [Avigail Hermosilla](#) [Michell Ann Pintor](#) [Lyrick Jason Angeles](#) [Marty Dumn Cuevas](#)

Comment by [Linda Popovic](#) [ 22/May/25 ]

[Nathan Batterham](#) - As discussed is there anything we can do to update the customer card instantly after customer details are entered/updated? You need to refresh the page to be confusing to agents.

Entered in details via "Update Individual Details" modal., they appear instantly in the details tab but not on the customer card.

!

{4099F684-42B8-4D4C-8888-990FE3A0FD53}-20250522-234648.png|width=1255,height=832,alt="{4099F684-42B8-4D4C-8888-990FE3A0FD53}

-20250522-234648.png"!

Comment by [Nathan Batterham](#) [ 23/May/25 ]

[Linda Popovic](#) - I'm going to say - its probably technically feasible to add the rerender of the component on a data update, however on this one, I think it might not be required - lets raise a backlog item to cover it if you are ok with this?

Comment by [Linda Popovic](#) [ 23/May/25 ]

Thanks [Nathan Batterham](#), sure will raise a backlog item.

Approved.

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