[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 ima image-20250519-084142.png {4099F684-42B8-4D4C-8888-990FE3A0FD53}-20250522-234648.png

Issue links:

Bug Of		
has Bug	~~RT00-12295~~	ST | Missing Customer Profile Card in...
Depends on		
is dependent on	~~RT00-11031~~	OVO Console - Console Layout
Relates		
relates to	~~RT00-12295~~	ST | Missing Customer Profile Card in...

Acceptance Criteria:

AC1

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

AC2

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:

- Customer Name (Preferred Name)
- Customer Type = Individual
- Date of Birth
- Mobile Phone
- Phone
- Email
- Mailing Address
- Link to `View All Authorised Contacts`

AC3

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:

- Business Name
- Customer Type = Business
- Mobile Phone
- Phone
- Email
- Mailing Address
- Link to `View All Authorised Contacts`

AC4

Given I am a Agent/Team Lead/Business Admin

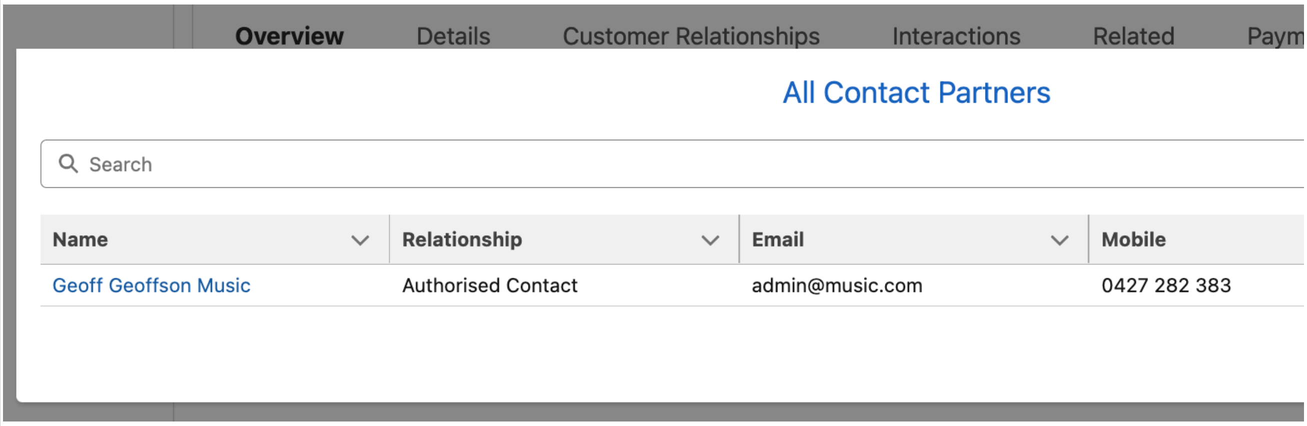
When I log into Salesforce

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



- 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:

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.

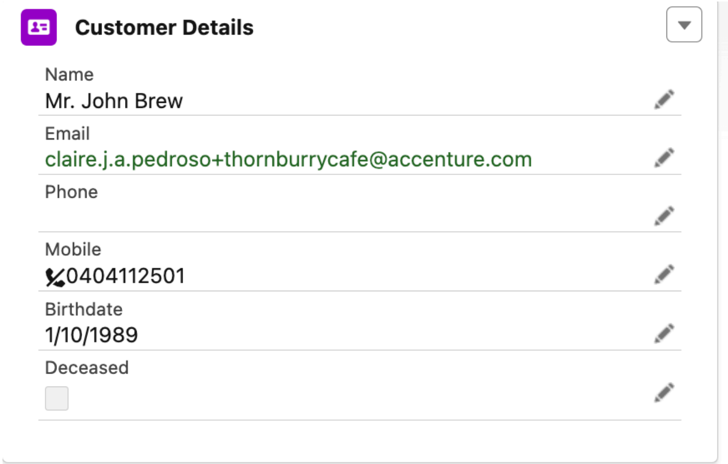
L2 Capability:	1.7 Customer Service
L3 Capability:	1.7.1 Customer Interaction Management
Story Points:	1
Sprint:	

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

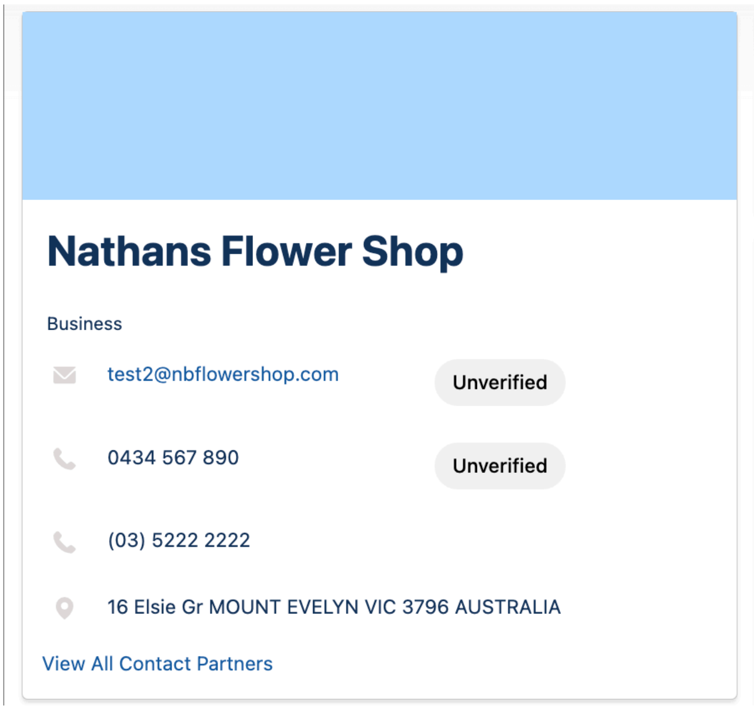
Description

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:



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



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

Comments

Comment by Linda Popovic [07/May/25]	
Hey Nathan Batterham - 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 Linda Popovic [13/May/25]	
AC's approved.	
Comment by Avigail Hermosilla [14/May/25]	
Working on this in SO.	
Comment by Yike Wang [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://aglenergy.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 Richmund 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

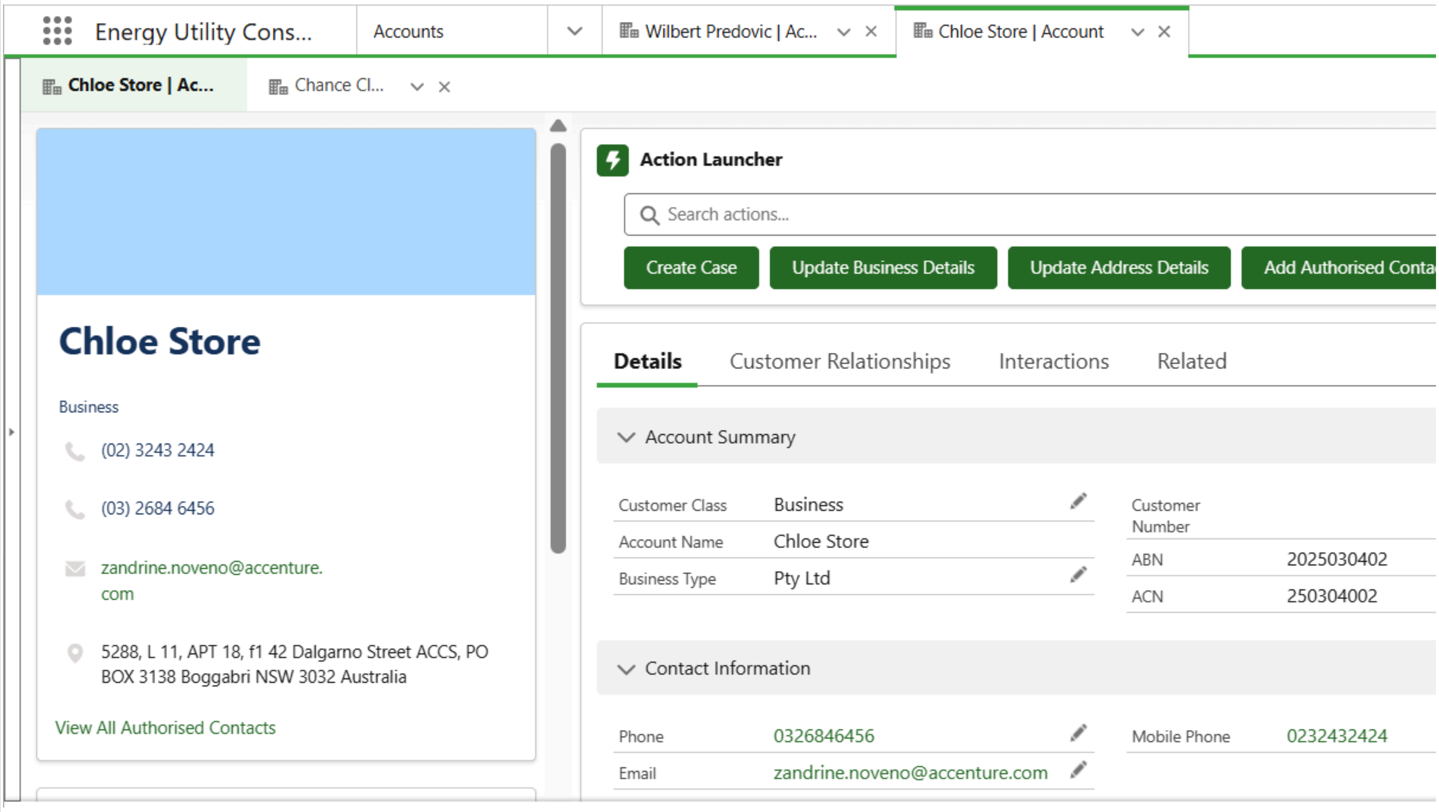
-Added the Account mailing address for business account in LeftProfile flexcard

cc. Nathan Batterham Richmund Lofranco

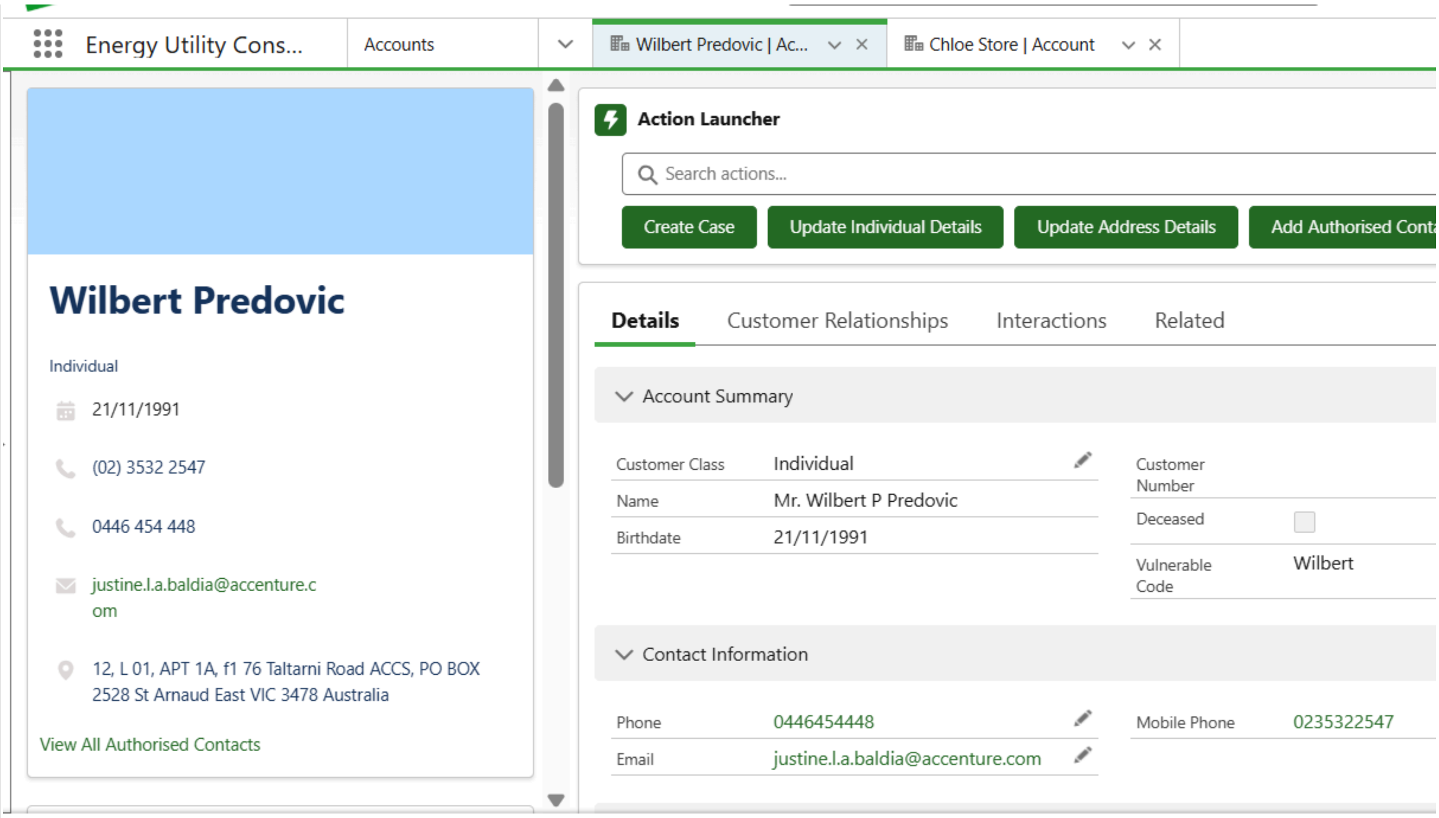
Comment by Avigail Hermosilla [19/May/25]

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

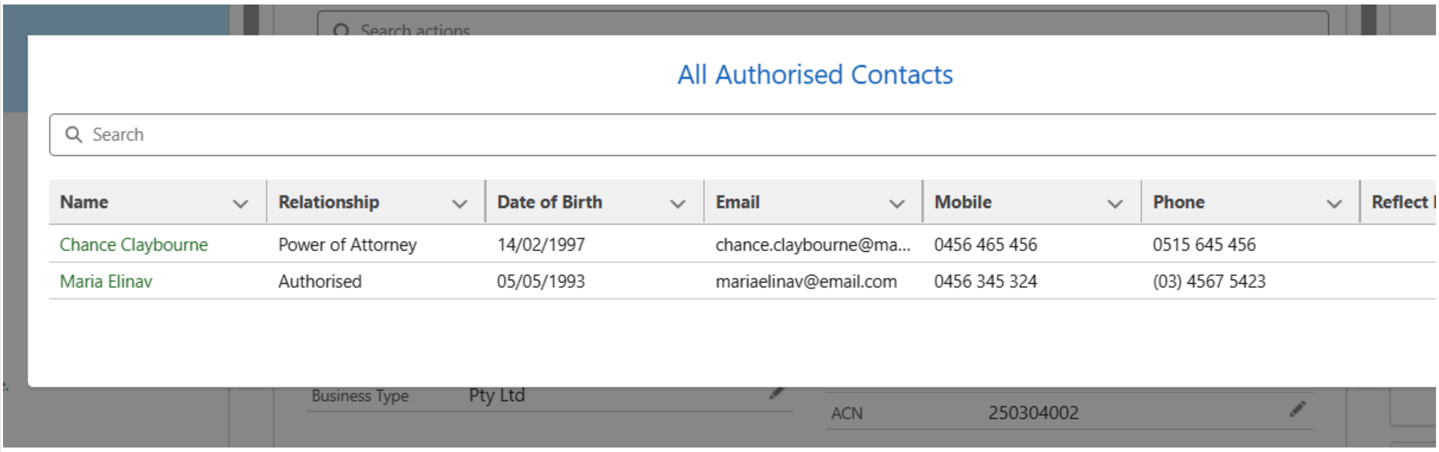
Business Account



Individual Account



All Authorised Contacts



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://aglenergy.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.

RT00-11025_qTest Test Evidence

Cc: Linda Popovic Geoff EagleNathan Batterham Yike Wang Melissa Sison Arvie Marie GaviolaAvigail Hermosilla Michell Ann Pintor Lyrick Jason AngelesMarty 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 tl 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 v 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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