Modernize Your Utility Billing with Salesforce.

A Utility Industry Guide to a Unified Customer360

Executive Summary.

Utility companies are caught between two essential platforms. Oracle Customer Care and Billing (CC&B) is the system of record for accounts, meters, premises, service agreements, and financial transactions. Salesforce is where customer relationships are managed, service cases are resolved, and commercial account strategy is executed. Yet in most utility organizations, these two systems do not talk to each other in any meaningful way.

The result is a customer service experience defined by friction: representatives switch between systems on every call, billing data arrives stale, and account teams lack the consolidated view needed to manage large commercial customers effectively.

This white paper examines the business case for integrating Oracle CC&B with Salesforce, the technical architecture that makes it work, and the operational capabilities it unlocks for utility companies ready to deliver a genuinely unified customer experience.

> Utility companies that unify billing and CRM data reduce average handle time, improve first-contact resolution, and free their teams from the burden of manual reconciliation between disconnected systems.

The Problem: Two Systems, One Customer.

The Daily Reality for Utility Customer Service Teams

A commercial customer calls about a billing discrepancy. The service representative opens Salesforce to see the account history. Then opens CC&B to see the billing detail. Then checks a third system for the active service agreement. Three platforms, one conversation, and a customer waiting on hold.

This is not an edge case. It is the daily operating reality for customer service teams at most utility companies. The core challenges include:

- Fragmented customer data spread across billing and CRM platforms with no single source of truth
- Billing information that is stale by the time it reaches the service representative
- No consolidated view of commercial account hierarchies for account management teams
- Manual reconciliation processes consuming hours of staff time each week
- No reliable audit trail for changes made to customer records across systems
- Limited visibility into engagement history, interaction frequency, and outreach activity per account

Why System Replacement Is Not the Answer

Oracle CC&B is purpose-built for utility billing. It handles complex rate structures, meter data management, premises, service agreements, and high-volume financial transactions at a scale that general-purpose CRM platforms are not designed to match.

Salesforce is purpose-built for relationship management. It tracks interactions, routes cases, manages territories, and gives leadership the dashboards and roll-ups they need to run a commercial business.

Neither system should replace the other. The right strategy is intelligent integration: making CC&B data visible at the moment of customer contact, in the platform where the conversation happens, without disrupting the billing operations that depend on CC&B's core architecture.

> The goal is not to replace Oracle CC&B. The goal is to make its data available where your team already works.

The Solution: MuleSoft-Powered Customer 360.

Integration Architecture

Brite Systems designs a MuleSoft integration layer that enables two-way batch synchronization between Salesforce and Oracle CC&B. The architecture is built around scheduled batch processing rather than real-time synchronization, ensuring that neither platform is burdened by continuous API calls while keeping data current at configurable intervals.

Integration Layer	MuleSoft Anypoint Platform with custom ETL flows for extracting, transforming, and loading data between Salesforce and Oracle CC&B; full data mapping documentation covering source tables, transform rules, field usage, and refresh cadence
Sync Model	Scheduled batch processing at configurable intervals (nightly, hourly, or custom cadence); error handling includes retry mechanisms for failed batch jobs to ensure no data is lost
Data Surface	CC&B data surfaced directly on Salesforce Account, Contact, and Customer objects; summary sections for Customer Service and Billing views; direct hyperlinks to open related CC&B records without leaving Salesforce
Security Model	Role-based security applied to all CC&B fields and pages; least-privilege access enforced across profiles and permission sets; field-level security aligned to job function
Administration	Admin guidance for maintaining CC&B fields, updating hyperlinks, and managing batch schedules; designed for sustainability without ongoing vendor dependency

CC&B Data Fields Surfaced in Salesforce

The integration brings the following categories of CC&B data directly into Salesforce records, organized by functional area:

- Account and identity: Customer Name, Account ID, Person ID, Primary Address, Manage Group, Industry, Account Representative, Business Description
- Service and premises: Meter, Premise ID, Address, Service Start Date, Active/Inactive status per service location
- Financial data: Revenue, Fiscal Year-to-Date (FYTD), Financial Transactions including Amount Due, SA ID, SA Type, and Received Date
- Notes and context: Note Subject and Note Source displayed on the Salesforce record for complete service context

Account Hierarchy: Managing Complex Commercial Customers.

Enterprise utility customers rarely have simple organizational structures. A parent corporation may operate across multiple subsidiaries, each with its own set of service locations, meters, and billing accounts. Without a structured hierarchy, account teams cannot see the full picture of a commercial relationship.

Brite implements a three-level account hierarchy within Salesforce that maps to how utility customers are actually organized:

- C1 level: Enterprise parent with consolidated roll-ups for total revenue, service activity, and account-level metrics
- C2 level: Subsidiary or division groupings with defined parent/child rules and territory alignment
- C3 level: Individual service account detail with full CC&B data surfaced for service and billing context

The hierarchy delivers reliable executive reporting, cleaner territory alignment, and role-specific dashboards calibrated for executives, managers, and individual account representatives.

> For commercial and enterprise utility accounts, the C1/C2/C3 framework gives account teams the consolidated intelligence they need to manage relationships proactively and grow revenue with confidence.

Customer360 Enhancements: The Full Picture.

Engagement and Interaction Tracking

Connecting billing data is one component of a comprehensive Customer360 platform. Brite also configures Salesforce to track all forms of customer engagement: in-person meetings, events, mailings, outbound outreach, and digital interactions. Each interaction is logged with subject, topic, frequency, owner, and next step, giving every account representative a complete view of relationship health.

Key engagement capabilities include:

- Interaction and event logging with subject, topic, frequency, and owner fields
- List views and quick filters for this week, past due, and by account representative
- Outbound outreach tracking and mailing history per account
- Customer type and customer definition picklists for consistent segmentation

Audit Trail and Data Governance

Utility companies operate in regulated environments where data integrity and accountability are not optional. Brite implements a complete audit trail that captures every change to a customer record, the user who made it, and the date and timestamp. Field History Tracking is enabled on Account, Contact, and Customer objects, and a dashboard surfaces recent changes for periodic admin review alongside the Salesforce Setup Audit Trail for configuration-level changes.

External System Integration Pattern

The CC&B integration establishes a reusable pattern that can be extended to additional back-office systems. Contract management platforms, work order systems, and asset management tools can all be surfaced within the Customer360 experience using the same architecture: read-only summary fields, related list details, and direct hyperlinks back to the source system.

Reporting and Dashboards.

Data that cannot be reported on does not drive decisions. The Customer360 platform includes a full reporting layer built around the CC&B and engagement data it surfaces:

- Customer service dashboards showing open cases, billing inquiries, and resolution times by account rep
- Sales and account management dashboards covering outreach frequency, interaction history, and revenue roll-ups
- Executive dashboards with C1/C2/C3 hierarchy roll-ups for total revenue and service activity
- Audit and compliance reports surfacing recent record changes for periodic review
- Products and services reporting tied to account type and customer segment

Managed Support and Long-Term Partnership.

Implementations succeed when they are supported after go-live. Brite's managed support model keeps the platform stable and evolving:

- 9 to 5 ET help desk coverage for Salesforce and MuleSoft issues
- Tiered SLAs: 4-hour response for critical issues, 24-hour for medium priority, 48-hour for low priority
- Break/fix and minor configuration adjustments within agreed guardrails
- User provisioning, permission management, and least-privilege enforcement
- Up to 120 hours per contract year available across a 3-year agreement

This model allows utility operations and IT teams to focus on their core business while Brite maintains and evolves the Salesforce platform as business needs change.

Why Brite Systems.

Brite Systems is a Salesforce Summit Consulting Partner with over 19 years of experience serving government agencies, utilities, and public sector organizations. Our team holds 200 or more Salesforce certifications and maintains a customer satisfaction score of 4.95 out of 5.0 across all engagements.

Our approach to utility integrations is grounded in three principles:

- We understand Salesforce, MuleSoft, and the back-office systems utilities depend on, including Oracle CC&B, billing platforms, and contract management tools Platform depth:
- 100% on-time delivery and a sub-5% team attrition rate over four years mean the team that scopes your project finishes it Delivery discipline:
- Our support model and structured change order process ensure the platform continues to evolve as your business grows Long-term partnership:

> Brite Systems does not just implement Salesforce. We build the operational platform your customer-facing teams rely on every day.

Getting Started.

Every utility integration engagement begins with a discovery workshop to understand your current CC&B configuration, your Salesforce org, and the data flows that matter most to your business. From there, Brite develops a phased implementation roadmap aligned to your priorities and your team's capacity for change.

Whether you are starting from scratch or looking to extend an existing Salesforce implementation, Brite can meet you where you are.

About Brite Systems .

Brite Systems is a Salesforce Summit Consulting Partner headquartered in Indiana, serving state and local government agencies, utilities, and public sector organizations for over 19 years. With 200+ Salesforce certifications, a 4.95/5.0 CSAT score, and a track record of 100% on-time delivery, Brite is the partner organizations trust for complex Salesforce implementations and integrations.

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