

Oracle CCS Customer Portal Selection Playbook

Purpose	Provide utilities with a detailed, procurement-ready playbook for selecting a customer portal aligned to Oracle Utilities CCS.
How to use	Send relevant tabs to vendors as RFP/RFI requirements. Require vendors to complete Vendor Response, Evidence Required, Score, and Notes columns.
Scoring	Score 0-5. Weighted Score is calculated automatically as Score x Weight.
Strategic lens	Align best-in-class solutions that keep Oracle CCS as system of record, avoid duplicate business logic, use supported APIs, and minimize upgrade/testing risk.
New tab added	The Portal RFP Requirements tab incorporates detailed requirements from the recent RFP covering activation/login, administration, look and feel, ADA, account actions, service orders, payment plans, communications, display/views, EBPP, non-core programs, and mobile.

Scoring Guide and Category Weighting

Score	Meaning	Evaluator Interpretation	Risk Signal	Evidence Expected	Procurement Note
0	Not supported	Vendor cannot support requirement or requires major custom build.	High	Exception statement	Use for disqualification if mandatory.
1	Mostly custom	Supported only with custom code, manual process, or third-party bolt-on.	High	Customization estimate	Ask for lifecycle/upgrade cost.
2	Partially supported	Supported with notable gaps or future roadmap dependency.	Medium	Roadmap + assumptions	Clarify delivery date.
3	Supported	Meets baseline requirement with normal configuration/integration.	Medium	Demo + configuration	Acceptable baseline. Request detail on cost/process for changes once in production
4	Strong	Supported with proven utility references and low implementation risk.	Low	Reference + demo	Good fit.
5	Best aligned	CCS-native, API-driven, proven, low TCO, minimal duplication.	Low	Live CCS reference + architecture	Highest scoring response.

Vendor Overview Requirements

Use this tab to qualify whether the vendor has real Oracle Utilities CCS portal experience, not just general utility CX experience.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
VO-001	Vendor Profile	Vendor shall identify the number of live Oracle CCS customer portal deployments.	Higher score for live CCS SaaS references, not just generic utility portal references.	Yes	5%		List of live customers, go-live dates, CCS version/SaaS status		0.0	
VO-002	Vendor Profile	Vendor shall provide references for utilities similar in size, service type, and regulatory environment.	References should demonstrate comparable customer volume, billing complexity, service orders, and payment arrangements.	Yes	4%		Reference contacts + use case matrix		0.0	
VO-003	Vendor Profile	Vendor shall disclose whether portal is productized, custom-built, or implementation-specific.	Higher score for repeatable product with configuration-first delivery.	Yes	4%		Product architecture and release management documentation		0.0	
VO-004	Vendor Profile	Vendor shall provide implementation timeline from contract to production go-live.	Higher score for proven delivery in under 90 days where scope is standard CCS portal functionality.	Yes	5%		Project plan + reference schedule		0.0	
VO-005	Vendor Profile	Vendor shall provide product roadmap for next 24-36 months.	Roadmap should align with Oracle CCS SaaS, digital engagement, AI, AMI, payments, and accessibility.	Preferred	2%		Roadmap deck		0.0	
VO-006	Vendor Profile	Vendor shall identify CCS functional resources assigned to implementation and support.	Higher score when portal team understands CCS business objects, not only front-end development.	Preferred	3%		Named roles + resumes/skill summary		0.0	

Strategic Architecture Requirements

These requirements shift evaluation away from generic portal features and toward CCS-native architecture, lower TCO, and upgrade safety.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
SA-001	System of Record	Oracle CCS shall remain the authoritative system of record for customer, account, premise, service agreement, bill, balance, payment, meter, and service order data.	Solutions should retrieve and transact through CCS rather than maintaining a parallel customer database.	Yes	6%		Architecture diagram + data residency matrix		0.0	
SA-002	No Duplicate Logic	Portal shall not duplicate CCS billing, collections, payment arrangement, service eligibility, or customer status logic outside CCS unless explicitly approved.	This is the most important differentiator: vendors must disclose what logic is outside CCS.	Yes	6%		Business logic inventory		0.0	
SA-003	API-First	Portal shall use supported API/IWS integration patterns and avoid direct database reads/writes.	Higher score for supported, upgrade-safe integrations.	Yes	5%		API catalog + integration design		0.0	
SA-004	Real-Time Transactions	Customer-initiated changes shall be submitted to CCS or CCS-aligned approval queues in real time or near real time.	Avoid nightly sync for customer-facing account changes.	Yes	5%		Sequence diagrams		0.0	
SA-005	Upgrade Resilience	Portal shall support Oracle quarterly SaaS updates with minimal regression testing and no core CCS customization dependency.	Vendor should explain testing effort per Oracle update.	Yes	4%		Upgrade playbook		0.0	
SA-006	Data Minimization	Portal shall minimize storage of PII and payment data outside utility-approved systems.	Higher score if portal stores only identity/session/configuration data and not replicated CIS data.	Yes	4%		Data classification and retention matrix		0.0	
SA-007	Configuration First	Portal shall allow branding, content, forms, banners, workflows, and feature enablement through configuration rather than custom code.	Configuration-first architecture lowers cost and speeds delivery.	Preferred	3%		Admin screenshots + config guide		0.0	
SA-008	Multi-Channel Foundation	Portal architecture shall support web, mobile responsive, embedded payment, notifications, chat/AI, and future channels through common services.	Avoid one-off channel silos.	Preferred	2%		Architecture roadmap		0.0	

Oracle CCS Alignment Requirements

Use this tab to force vendors to prove how each customer transaction aligns with Oracle CCS business rules and data ownership.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
CCS-001	CCS Alignment	Start Service shall leverage CCS customer/account/premise/service agreement rules and create or route work according to utility-defined CCS process design.	Ask vendor to show which steps happen in CCS versus portal code.	Yes	5%		Demo + CCS transaction mapping		0.0	
CCS-002	CCS Alignment	Stop Service shall leverage CCS process rules, restrictions, dates, final billing dependencies, and downstream service order logic.	High score if no duplicate final bill or restriction logic is maintained in the portal.	Yes	4%		Process flow		0.0	
CCS-003	CCS Alignment	Transfer Service shall support moving from one premise/service location to another while preserving CCS account relationship rules.	Must demonstrate CCS object model understanding.	Yes	4%		Demo + mapping		0.0	
CCS-004	CCS Alignment	Payment Arrangements/Promise to Pay shall leverage CCS eligibility and collections rules.	Avoid portal-owned payment plan logic unless CCS cannot support the desired process.	Yes	5%		Rules mapping + demo		0.0	
CCS-005	CCS Alignment	Budget Billing/Levelized Billing shall display CCS-calculated suggested amount and enrollment/renewal status.	Higher score if portal reads CCS-calculated amounts rather than recalculating.	Yes	4%		Demo		0.0	
CCS-006	CCS Alignment	Account alerts/restrictions shall prevent customer actions when CCS status indicates restrictions such as cash-only, collection hold, fraud flag, or service limitation.	Portal must respect CCS account state in real time.	Yes	5%		Restriction matrix		0.0	
CCS-007	CCS Alignment	Customer contact updates shall capture old value/new value, timestamp, source, and initiator in CCS or auditable integration layer.	This creates confidence in auditability and CSR trust.	Yes	3%		Audit logs		0.0	
CCS-008	CCS Alignment	Portal shall display account-person-premise-meter/service agreement relationships using CCS data structure.	Important for multi-account, landlord, commercial, and responsible party scenarios.	Preferred	3%		Object mapping		0.0	
CCS-009	CCS Alignment	Service orders shall be created, routed, displayed, and updated based on CCS/WACS/OFS or approved work management integration patterns.	Vendor must not create orphaned portal-only service requests unless explicitly designed.	Yes	4%		Service order integration design		0.0	
CCS-010	CCS Alignment	Portal shall provide a clear transaction inventory: CCS-native, CCS-integrated, payment provider, MDM/AMI, third-party, or portal-native.	This allows apples-to-apples scoring.	Yes	5%		Transaction inventory		0.0	

Customer Self-Service Requirements

Use this tab for customer-facing functions. Score higher when functions execute through CCS or CCS-aligned workflows.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
CSS-001	Registration	Customer shall be able to register using account identifiers and identity verification rules defined by the utility.	Support should include sample account number guidance and secure identity validation.	Yes	3%		Registration demo		0.0	
CSS-002	Account Linking	Customer shall use a single login to view and manage all eligible accounts, premises, and service locations.	Higher score if relationship rules are sourced from CCS.	Yes	4%		Demo multi-account scenario		0.0	
CSS-003	Profile Management	Customer shall update email, phone, preferred contact number, mailing address, paperless billing, and communication preferences.	Changes should update CCS or route to CCS approval queue.	Yes	4%		Demo + audit		0.0	
CSS-004	Guest Access	Portal shall support guest payment and configurable guest/inquiry access where utility policy permits.	Useful for landlords, caretakers, property managers, and assisted customers.	Preferred	2%		Configuration demo		0.0	
CSS-005	Form Save/Resume	Customer shall save incomplete forms and resume from last completed step.	Improves completion rates for start service, program enrollment, and complex requests.	Preferred	2%		Demo		0.0	
CSS-006	Documents	Portal shall allow customers to view, upload, download, print, and store customer-facing documents where appropriate.	Documents should link to CCS/document repository when possible.	Preferred	2%		Document flow		0.0	
CSS-007	Responsible Parties	Portal shall capture multiple responsible parties and associated relationship, contact, and address information.	Important for municipal, landlord/tenant, and commercial scenarios.	Preferred	2%		Demo		0.0	

Payments and EBPP Requirements

Use this tab to separate payment processor capabilities from portal capabilities and avoid payment-provider lock-in.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
PAY-001	EBPP	Portal shall support authenticated single sign-on to EBPP/payment provider without requiring re-authentication.	Portal can remain payment-provider independent while preserving customer experience.	Yes	4%		SSO flow		0.0	
PAY-002	Guest Pay	Portal shall support guest payment without requiring an online profile.	Guest pay should route to configured payment provider and reflect in CCS/payment history.	Yes	3%		Demo		0.0	
PAY-003	Payment Provider Independence	Portal shall support Paymentus, InvoiceCloud, Kubra, or other utility-approved payment processors.	Avoid portal lock-in to a payment processor.	Preferred	4%		List of supported providers		0.0	
PAY-004	Notifications	Portal shall support payment processed, payment failed, payment due, bill ready, and payment received notifications.	Must align with communication preferences.	Preferred	3%		Notification demo		0.0	
PAY-005	Payment History	Portal shall display payment activity with date/time and source, including web/IVR where available.	Data should come from CCS/payment provider with clear ownership.	Yes	3%		Payment history demo		0.0	

Security, Privacy, and Accessibility Requirements

Use this tab to evaluate identity, audit, privacy, co-browsing, session, and accessibility controls.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
SEC-001	Security	Portal shall support MFA during registration and login using email and/or text based on utility policy.	Avoid weak registration and account takeover risk.	Yes	4%		Security configuration		0.0	
SEC-002	Security	Portal shall prevent bot/spam-generated portal accounts using CAPTCHA, rate limiting, reputation checks, or equivalent controls.	Important for public portal exposure.	Yes	4%		Security controls		0.0	
SEC-003	Security	Portal shall support account lockout after configurable failed login attempts and CSR unlock without IT involvement.	Operationalizes security while reducing IT tickets.	Yes	4%		Admin demo		0.0	
SEC-004	Security	Portal shall provide audit tracking for customer-initiated versus CSR/admin-initiated changes.	Critical for regulated customer data changes.	Yes	4%		Audit report		0.0	
SEC-005	Accessibility	Portal shall meet WCAG 2.1 AA/ADA requirements including keyboard navigation, focus indicators, alt text, labels, contrast, zoom, captions, and transcripts.	Accessibility should be tested, not merely claimed.	Yes	5%		VPAT/accessibility test results		0.0	
SEC-006	Privacy	Co-browsing shall mask passwords, payment data, and sensitive information and notify the customer before session begins.	Strong operational support without privacy leakage.	Preferred	3%		Co-browse demo		0.0	
SEC-007	Session Management	Portal shall provide inactivity warning and automatic timeout/logoff after configurable time.	Must balance usability and risk.	Yes	3%		Security configuration		0.0	

Administration and Analytics Requirements

Use this tab to evaluate how much control the utility has after go-live without vendor tickets.

ID	Category	Requirement	Oracle CCS-Native Evaluation Guidance	Mandatory?	Weight	Vendor Response	Evidence Required	Score (0-5)	Weighted Score	Evaluator Notes
ADM-001	Administration	Admin portal shall support user-based permissions, roles, and business-owner managed access.	Higher score if utility staff can manage without vendor/IT involvement.	Yes	4%		Admin demo		0.0	
ADM-002	Administration	Admin portal shall support customer search, enrollment reporting, profile activation/inactivation, account unlock, and password reset.	Call center usability matters as much as customer UI.	Yes	4%		Admin demo		0.0	
ADM-003	Administration	Admin portal shall support banners, alerts, landing page messages, campaign content, and targeted communications.	This is a strong differentiator for utilities needing rapid communications.	Preferred	3%		Campaign demo		0.0	
ADM-004	Analytics	Portal shall report enrollments, page visits, logins, service orders created, transaction volume, adoption, abandonment, and utilization trends.	Score higher for configurable dashboards and exportable reports.	Preferred	3%		Report samples		0.0	
ADM-005	Analytics	Portal shall track visitor behavior including first-time/repeat visitors, entry/referring URL, pages viewed, time on page/site, and real-time statistics where permitted.	Analytics must comply with privacy requirements.	Preferred	2%		Analytics design		0.0	
ADM-006	Co-Browse Analytics	Portal shall track co-browsing usage by page, service, session length, customer, and CSR/UAR.	Useful for call center coaching and portal improvement.	Preferred	2%		Co-browse reports		0.0	

Differentiator Questions

ID	Question	CCS Compatible Portals	Evidence Required	Vendor Response	Score (0-5)	Notes
HD-001	Describe every customer transaction executed directly within Oracle CCS.	Forces vendors to disclose whether they extend CCS or recreate it.	Transaction inventory + demo			
HD-002	Describe every customer transaction executed outside Oracle CCS.	Reveals duplicate business logic and lifecycle cost.	Exception list			
HD-003	Identify all duplicated customer, account, billing, payment, and service order data stored outside CCS.	Exposes data sync, security, and audit risk.	Data model + retention policy			
HD-004	Explain how portal behavior changes when CCS business rules change.	CCS-native portals inherit or integrate business rule changes faster.	Configuration/process example			
HD-005	Explain regression testing required after Oracle quarterly SaaS updates.	Generic portals often require larger testing footprint.	Upgrade testing plan			
HD-006	Provide ten-year TCO including integrations, upgrades, regression testing, customizations, and support.	Highlights long-term cost of non-native approaches.	TCO model			
HD-007	If Oracle releases new CCS functionality for a customer process, how does it become available in the portal?	Tests Oracle roadmap alignment.	Roadmap alignment narrative			
HD-008	Which portal functions require vendor code change versus utility configuration?	Favors configurable productized platforms.	Admin demo + feature flag list			
HD-009	How does the portal prevent actions when CCS account restriction/alert code exists?	Strong CCS-native requirement.	Restriction demo			
HD-010	Can utility staff manage banners, alerts, content, roles, account unlock, and reporting without vendor involvement?	Shows post-go-live operational control.	Admin portal demo			