Data Standards Body
Technical Working Group

Decision Proposal 113 – Customer Data Payloads

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Context

This proposal describes the payloads for the Customer Data cluster of data included in the energy sector designation instrument. This proposal includes feedback obtained in response to the following consultation activities:

- **Decision Proposal 103 – Electricity End Points**
  This consultation proposed a series of URIs for the whole energy sector. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/103
- **First Energy API Workshop**
  This workshop was conducted online and the NMI Standing Data fields were discussed specifically. The outcomes of the workshop can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/wiki/Consumer-Data-Right-%7C-Energy-API-Workshop-%7C-Online---Outcomes

As has been previously stated in workshops and through previous consultations the expectation for this data set is that the existing "common" payloads and end points established for the CDR will be used. This proposal has been developed on the basis of that assumption.

Decision To Be Made

Define the preliminary end point URIs and payloads for Customer Data.

Identified Options

When the DSB established the standards for the banking sector it was identified that the customer data cluster was not banking specific and was instead reflective of an Australian customer, whether an individual or an organisation.

For this reason, the end points and payloads for the customer data cluster were established under the *common* industry node in the URI structure rather than under the *banking* industry node.

As the CDR is extended to the second industry sector the expectation is that this existing standard will be re-used. This proposal is based on this underlying assumption.

In taking this position, the applicability of these end points and payloads in a cross-sector context is being tested for the first time. Feedback is therefore explicitly being sought on any problems with these existing payloads in the context of the energy sector.

It is the intent of the DSB that any changes that arise to the payloads as a result of this consultation will be retrofitted to the banking sector to maintain these end points as common to all sectors.

Notes on existing specification

The existing specification for the customer end points can be found at:
https://consumerdatastandardsaustralia.github.io/standards/#get-customer

The usage of these end points can be clarified as per the points below. These clarifications are expected to be applicable to the energy sector:
- These end points can only return data for the currently authenticated customer. There is no way with these end points to obtain data on other customers, additional contacts or authorised representatives
- The end points support data for individuals and for organisations. In the case of organisations, as an individual must still establish the consent, the concept of the individual establishing consent as an agent of the organisation is included. Only minimal information on the agent is returned in this context to help people working on behalf of organisations to separate their personal information and the information relevant to their role as an agent.
- These end points do not define who a customer is or the boundaries between the identification of a customer. This is largely left to be defined by the data holder as it is dependent on how they onboard and manage customers. Refer to the following section of the existing CDR standards for more information:
https://consumerdatastandardsaustralia.github.io/standards/#cdr-federation

Current Recommendation

The recommended URIs and Payloads for the NMI standing data is presented in the following sections.

Customer End Points Summary

A summary of the customer end points:
- GET   /common/customer
- GET   /common/customer/detailed

Common Object Types

These structures are used multiple times in the customer payloads and are therefore documented separately.

Simple Address Type

Field	Type	Mandatory	Description
{			
mailingName	String	Optional	Name of the individual or business formatted for inclusion in an address used for physical mail
addressLine1	String	Mandatory	First line of the standard address object
addressLine2	String	Optional	Second line of the standard address object
addressLine3	String	Optional	Third line of the standard address object
postcode	String	Conditional	Mandatory for Australian addresses
city	String	Mandatory	Name of the city or locality
state	String	Mandatory	Free text if country is not Australia. If country is Australia then must be one of the values defined by the ISO 3166:AU standard
country	ExternalRef	Optional	Enumeration with values from ISO 3166 Alpha-3 country codes. Assumed to be AUS if absent
}			

PAF Address Type

Field	Type	Mandatory	Description
{			
dpid	String	Optional	Unique identifier for an address as defined by Australia Post. Also known as Delivery Point Identifier
thoroughfareNumber1	PositiveInteger	Optional	Thoroughfare number for a property (first number in a property ranged address)
thoroughfareNumber1Suffix	String	Optional	Suffix for the thoroughfare number. Only relevant is thoroughfareNumber1 is populated
thoroughfareNumber2	PositiveInteger	Optional	Second thoroughfare number (only used if the property has a ranged address eg 23-25)
thoroughfareNumber2Suffix	String	Optional	Suffix for the second thoroughfare number. Only relevant is thoroughfareNumber2 is populated
flatUnitNumber	String	Optional	Unit number (including suffix, if applicable)
floorLevelNumber	String	Optional	Floor or level number (including alpha characters)
lotNumber	PositiveInteger	Optional	Allotment number for the address
buildingName1	String	Optional	Building/Property name 1
buildingName2	String	Optional	Building/Property name 2
streetName	String	Optional	The name of the street
streetType	String	Optional	The street type. Valid enumeration defined by Australia Post PAF code file
streetSuffix	String	Optional	The street type suffix. Valid enumeration defined by Australia Post PAF code file
postalDeliveryType	String	Optional	Postal delivery type. (eg. PO BOX). Valid enumeration defined by Australia Post PAF code file
postalDeliveryNumber	PositiveInteger	Optional	Postal delivery number if the address is a postal delivery type
postalDeliveryNumberPrefix	String	Optional	Postal delivery number prefix related to the postal delivery number

Field	Type	Mandatory	Description
postalDeliveryNumberSuffix	String	Optional	Postal delivery number suffix related to the postal delivery number
localityName	String	Mandatory	Full name of locality
postcode	String	Mandatory	Postcode for the locality
state	String	Mandatory	State in which the address belongs. Valid enumeration defined by Australia Post PAF code file
}			

Basic Customer Data

High Level Information

Title	Obtain basic information on the customer that has authorised the current session
HTTP Method	GET
URI	/common/customer
Security Scope	common:customer.basic:read
Pagination	Not supported
Path Parameters	None
Query Parameters	None

Request Payload
Not applicable

Response Payloads
HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
customerUType	Enum	Mandatory	The type of customer object delivered. Valid values are: "person", "organisation"
person	Object	Conditional	Object used to describe the individual that has authorised the session if they have authorised in the context of their own personal information
{			
lastUpdated	DateTimeString	Optional	The date and time that any data in this record was last updated by the customer. If no update has occurred then this date should reflect the initial creation date for the data
firstName	String	Optional	For people with single names this field need not be present. The single name should be in the lastName field

Field	Type	Mandatory	Description
lastName	String	Mandatory	For people with single names the single name should be in this field
middleNames	Array[String]	Mandatory	Field is mandatory but array may be empty
prefix	String	Optional	Also known as title or salutation. The prefix to the name (e.g. Mr, Mrs, Ms, Miss, Sir, etc)
suffix	String	Optional	Used for a trailing suffix to the name (e.g. Jr)
occupationCode	Enum	Optional	Occupation code as defined by the ANZSCO v1.2 Standard Classification of Occupations
}			
organisation	Object	Conditional	This object is mandatory if the authorisation for access was given in the context of an agent for a business customer. It should not be present if retail consumers, on their own behalf, gave the authorisation for access.
{			
lastUpdated	DateTimeString	Optional	The date and time that any data in this record was last updated by the customer. If no update has occurred then this date should reflect the initial creation date for the data
agentFirstName	String	Optional	The first name of the individual providing access on behalf of the organisation. For people with single names this field need not be present. The single name should be in the agentLastName field
agentLastName	String	Mandatory	The last name of the individual providing access on behalf of the organisation. For people with single names the single name should be in this field
agentRole	String	Mandatory	The role of the individual identified as the agent who is providing authorisation. Expected to be used for display. Default to "Unspecified" if the role is not known
legalName	String	Optional	Legal name of the organisation
businessName	Array[String]	Mandatory	Known alternate names of the organisation. Array is mandatory but may be empty

Field	Type	Mandatory	Description
shortName	String	Optional	Short name used for communication, if different to the business name
abn	String	Optional	Australian Business Number for the organisation
acn	String	Optional	Australian Company Number for the organisation, if applicable and known
isACNCRegistered	Boolean	Optional	True if registered with the ACNC. False if not. Absent or null if not confirmed.
industryCode	Enum	Optional	ANZSIC (2006) code for the organisation
organisationType	Enum	Mandatory	Enumeration with values: - SOLE_TRADER - COMPANY - PARTNERSHIP - TRUST - GOVERNMENT_ENTITY - OTHER
registeredCountry	ExternalRef	Optional	Enumeration with values from ISO 3166 Alpha-3 country codes. Assumed to be AUS if absent
establishmentDate	DateString	Optional	The date the organisation described was established
}			
}			
links	Object	Mandatory	
{			
self	URI		Fully qualified link to this API call
}			
meta	Object	Optional	

Detailed Customer Data

High Level Information

Title	Obtain detailed information on the customer that has authorised the current session
HTTP Method	GET
URI	/common/customer/detail
Security Scope	common:customer.detail:read
Pagination	Not supported
Path Parameters	None
Query Parameters	None

Request Payload

Not applicable

Response Payloads

HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
customerUType	Enum	Mandatory	The type of customer object delivered. Valid values are: "person", "organisation"
person	Object	Conditional	Object used to describe the individual that has authorised the session if they have authorised in the context of their own personal information
{			
lastUpdated	DateTimeString	Optional	The date and time that any data in this record was last updated by the customer. If no update has occurred then this date should reflect the initial creation date for the data
firstName	String	Optional	For people with single names this field need not be present. The single name should be in the lastName field

Field	Type	Mandatory	Description
lastName	String	Mandatory	For people with single names the single name should be in this field
middleNames	Array[String]	Mandatory	Field is mandatory but array may be empty
prefix	String	Optional	Also known as title or salutation. The prefix to the name (e.g. Mr, Mrs, Ms, Miss, Sir, etc)
suffix	String	Optional	Used for a trailing suffix to the name (e.g. Jr)
occupationCode	Enum	Optional	Occupation code as defined by the ANZSCO v1.2 Standard Classification of Occupations
phoneNumbers	Array[Object]	Mandatory	Array is mandatory but may be empty
[{			
isPreferred	Boolean	Optional	May be true for one and only one entry to indicate the preferred phone number. Assumed to be 'false' if not present
purpose	Enum	Mandatory	The purpose of the number as specified by the customer. Note that the INTERNATIONAL number indicates a number that is applicable for contacting the customer if they are overseas. Enumeration with values: - MOBILE - WORK - HOME - OTHER - INTERNATIONAL - UNSPECIFIED
countryCode	String	Optional	If absent assumed to be +61 for Australia. The + should be included
areaCode	String	Optional	If this field is present and refers to an Australian area code then the leading '0' should not be included.
number	String	Mandatory	The actual phone number with leading zeroes as appropriate
extension	String	Optional	An extension number (if applicable)
fullNumber	ExternalRef	Mandatory	Fully formatted phone number with country code, area code, number and extension incorporated. Formatted according to Section 5.1.4 of RFC 3966

Field	Type	Mandatory	Description
}]			
emailAddresses	Array[Object]	Mandatory	Array is mandatory but may be empty
[{			
isPreferred	Boolean	Optional	May be true for one and only one email record in the collection. Denotes the default email address
purpose	Enum	Mandatory	Purpose of the email as specified by the customer. Enumeration with values: - WORK - HOME - OTHER - UNSPECIFIED
address	ExternalRef	Mandatory	A correctly formatted email address as defined by the addr_spec format in RFC 5322
}]			
physicalAddresses	Array[Object]	Mandatory	An array of addresses. There must be at least one record. One, and only one, record may have the purpose of REGISTERED. Zero or one, and no more than one, record may have the purpose of MAIL. If zero then the REGISTERED address is to be used for mail.
[{			
purpose	Enum	Mandatory	Enumeration with values: - REGISTERED - MAIL - PHYSICAL - WORK - OTHER
addressUType	Enum	Mandatory	The type of address object that is present. Valid values are: "simple", "paf"
simple	Simple Address (defined above)	Conditional	One of these objects must be present to represent the address
paf	PAF Address (defined above)	Conditional	

Field	Type	Mandatory	Description
}]			
}			
organisation	Object	Conditional	This object is mandatory if the authorisation for access was given in the context of an agent for a business customer. It should not be present if retail consumers, on their own behalf, gave the authorisation for access.
{			
lastUpdated	DateTimeString	Optional	The date and time that any data in this record was last updated by the customer. If no update has occurred then this date should reflect the initial creation date for the data
agentFirstName	String	Optional	The first name of the individual providing access on behalf of the organisation. For people with single names this field need not be present. The single name should be in the agentLastName field
agentLastName	String	Mandatory	The last name of the individual providing access on behalf of the organisation. For people with single names the single name should be in this field
agentRole	String	Mandatory	The role of the individual identified as the agent who is providing authorisation. Expected to be used for display. Default to "Unspecified" if the role is not known
legalName	String	Optional	Legal name of the organisation
businessName	Array[String]	Mandatory	Known alternate names of the organisation. Array is mandatory but may be empty
shortName	String	Optional	Short name used for communication, if different to the business name
abn	String	Optional	Australian Business Number for the organisation
acn	String	Optional	Australian Company Number for the organisation, if applicable and known
isACNCRegistered	Boolean	Optional	True if registered with the ACNC. False if not. Absent or null if not confirmed.

Field	Type	Mandatory	Description
industryCode	Enum	Optional	ANZSIC (2006) code for the organisation
organisationType	Enum	Mandatory	Enumeration with values: - SOLE_TRADER - COMPANY - PARTNERSHIP - TRUST - GOVERNMENT_ENTITY OTHER
registeredCountry	ExternalRef	Optional	- Enumeration with values from ISO 3166 Alpha-3 country codes. Assumed to be AUS if absent
establishmentDate	DateString	Optional	The date the organisation described was established
physicalAddresses	Array[Object]	Mandatory	An array of addresses. There must be at least one record. One, and only one, record may have the purpose of REGISTERED. Zero or one, and no more than one, record may have the purpose of MAIL. If zero then the REGISTERED address is to be used for mail.
[{			
purpose	Enum	Mandatory	Enumeration with values: - REGISTERED - MAIL - PHYSICAL - WORK - OTHER
addressUType	Enum	Mandatory	The type of address object that is present. Valid values are: "simple", "paf"
simple	Simple Address (defined above)	Conditional	One of these objects must be present to represent the address
paf	PAF Address (defined above)	Conditional	The address specified
}]			
}			

Field	Type	Mandatory	Description
}			
links	Object	Mandatory	
{			
self	URI		Fully qualified link to this API call
}			
meta	Object	Optional	