

**Oracle Utilities Customer Care and Billing
Release 2.3.1**

Utility Reference Model

3.3.2.4 Stop Non-Premise Based Service

July 2012

Oracle Utilities Mobile Customer Care and Billing Utility Reference Model 3.3.2.4, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Stop Non-Premise Based Service business process and associated process diagrams. This includes:

- **Brief Description**
 - **Actors/Roles**

Brief Description

Business Process: 3.3.2.3 Stop Non Premise Based Service

Process Type: Sub-Process

Parent Process: 3.3.2 Manage Service Agreement

Sibling Processes: 3.3.2.1 Start Premise Based Services, 3.3.2.3 Stop Premise Based Service, 3.3.2.2 Start Non-Premise Based Service, 3.3.3.2 Determine Customer Deposit, 3.3.1.1 Establish Person and or Account, 3.4.1.1 Manage Customer Contacts, 5.3.2 Manage Fieldworks (CCB), 4.2.2 Manage Bill, 4.3.1.1 Manage Payments, 4.3.2.1 Manage Collection Process

This process describes the typical Stop Service processing for Non Premise Based Service Agreements. In Stop Service process the relationship between the Service Provider and Customer is terminated. There is an effective end date for the Service Agreement.

The request for Stop Service could be for example:

- One time Charge
- Completion of Merchandise Installments
- Completion of Charitable Contribution
- CC&B's Auto-Stop of Non-Premise based Services configuration

Actors/Roles

The Stop Non-Premise Based Service business process involves the following actors and roles.

- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

Chapter 2

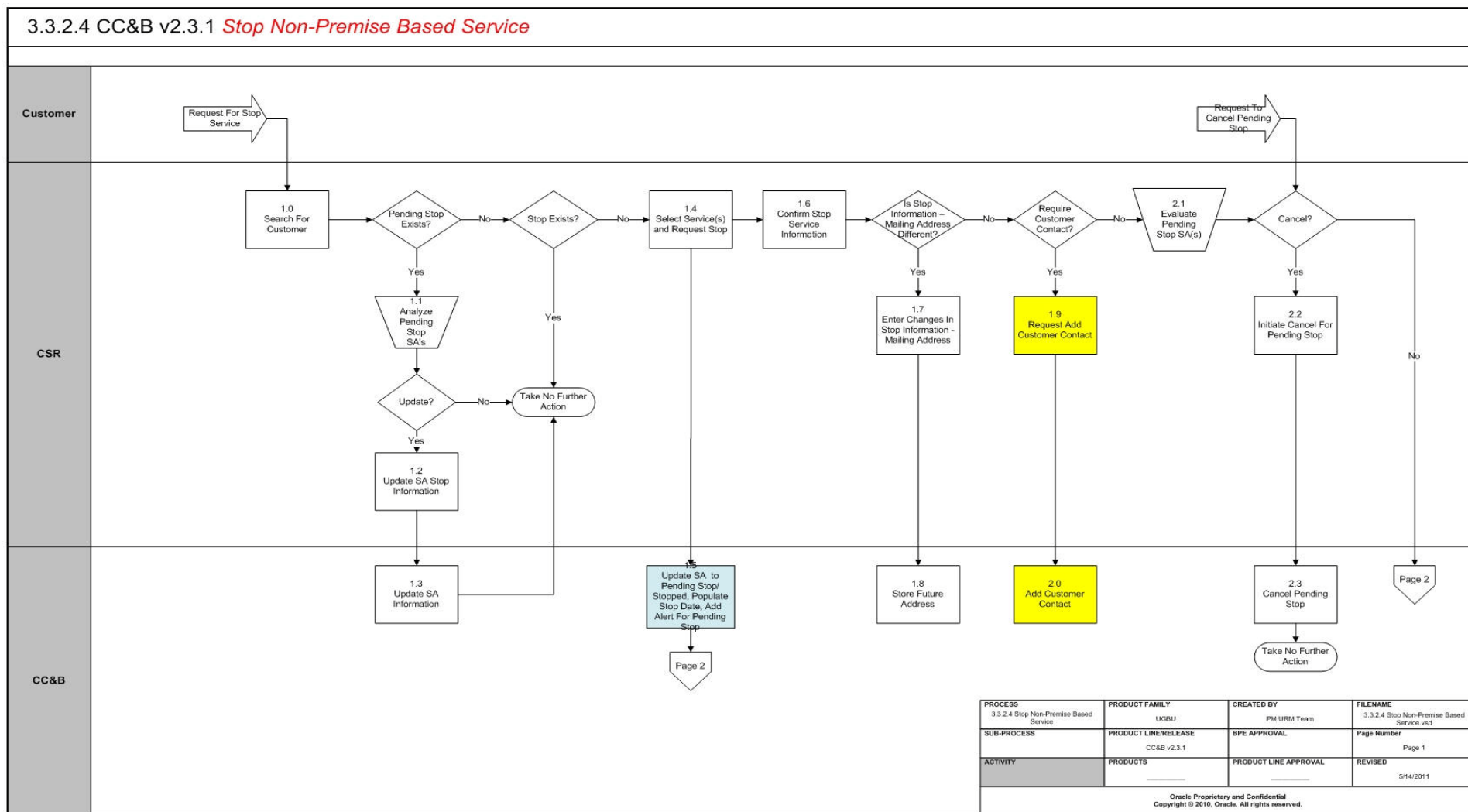
Detailed Business Process Model Description

This chapter provides a detailed description of the Stop Non-Premise Based Service business process. This includes:

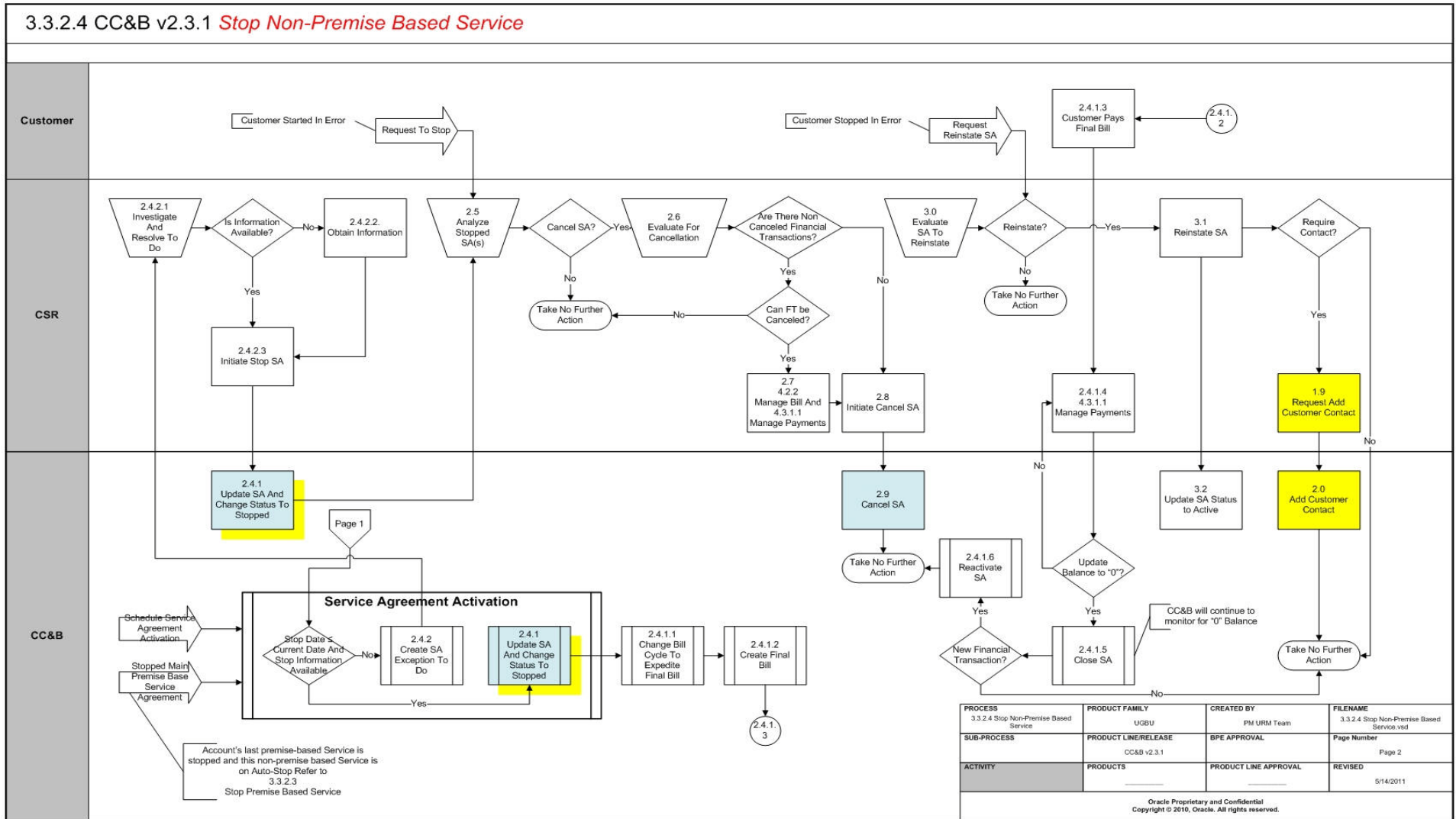
- **Business Process Diagrams**
 - **Stop Non-Premise Based Service Page 1**
 - **Stop Non-Premise Based Service Page 2**
- **Stop Non-Premise Based Service Description**
- **Installation Options - Control Central Alert Algorithms**
- **Standard Non-Premise Based SA Types**
- **Related Training**

Business Process Diagrams

Stop Non-Premise Based Service Page 1



Stop Non-Premise Based Service Page 2



Stop Non-Premise Based Service Description

This section includes detailed descriptions of the steps involved in the Stop Non-Premise Based Service business process, including:

- 1.0 Search for Customer
- 1.1 Analyze Pending Stop SA(s)
- 1.2 Update SA Stop Information
- 1.3 Update SA Information
- 1.4 Select Service(s) and Request Stop
- 1.5 Change SA to Pending Stop/Stopped, Populate Stop Date, Add Alert for Pending Stop
- 1.6 Confirm Stop Service Information
- 1.7 Enter Changes in Stop Information- Mailing Address
- 1.8 Store Future Address
- 1.9 Request Add Customer Contact
- 2.0 Add Customer Contact
- 2.1 Evaluate Pending Stop SA(s)
- 2.2 Initiate Cancel for Pending Stop
- 2.3 Cancel Pending Stop
- 2.4.1 Update SA and Change Status to Stopped
- 2.4.1.1 Change Bill Cycle to Expedite Final Bill
- 2.4.1.2 Create Final Bill
- 2.4.1.3 Customer Pays Final Bill
- 2.4.1.4 4.3.1.1 Manage Payments
- 2.4.1.5 Close SA
- 2.4.1.6 Reactivate SA
- 2.4.2 Create SA Exception To Do
- 2.4.2.1 Investigate and Resolve To Do
- 2.4.2.2 Obtain Information
- 2.4.2.3 Initiate Stop SA
- 2.5 Analyze Stopped SA
- 2.6 Evaluate for Cancellation
- 2.7 4.2.2 Manage Bill and 4.3.1.1 Manage Payments
- 2.8 Initiate Cancel SA
- 2.9 Cancel SA
- 3.0 Evaluate SA to Reinstate
- 3.1 Reinstate SA
- 3.2 Update SA Status to Active

1.0 Search for Customer

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request to stop service the CSR or Authorized User accesses Control Central Search to locate the Customer in CC&B. When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central - Account Information refreshed with the selected customer's data. Dashboard Alerts provide the CSR or Authorized User with pertinent information for the customer including Pending Stops.

Entities to Configure

Installation Options

Zones

Available Algorithms

Installation Options - Control Central Alert Algorithms

Person Information PERS-INFO-LF; Person Name Format Validation - NFMF-VALFMT

1.1 Analyze Pending Stop SA(s)

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User analyzes the existing Pending Stop service to ensure all information is received from Customer and confirms stop date.

1.2 Update SA Stop Information

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: A stop date or other Service Agreement information may need to be changed. The CSR or Authorized User enters the changes.

1.3 Update SA Information

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Any updates for the Service Agreement are made in CC&B.

Entities to Configure
Installation Options

Business Objects	Available Algorithms
ServiceAgreement - ServiceAgreement	Installation Options - SA Information Algorithms
C1-SABasic - Service Agreement Basic	
CI_DepositSAAmount - Maintain Deposit SA Amount	SA Information - C1-SAI-INFO
CI_SAIInfo - SA Information	
SARelationship - Service Agreement Relationship	
CI_SATypeStartOptionRequireds - SA Type Start Option Required	

1.4 Select Service(s) and Request Stop

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User selects services to stop.

The CSR or Authorized User is presented with the following choices. The CSR or Authorized User selects options available to stop Non Premise Based Service Agreements.

- Stop Selected SA's - To Stop selected Service Agreements linked to the Account
- Stop a Premise To Stop All Services at the Premise (Address)
- Stop a SA - To Stop a specific SA
- Stop all Active SA's - To Stop All service agreements linked to the Account

Entities to Configure
Installation Options; SA Type

Available Algorithms

Installation Options - SA Information Algorithms; SA Type - SA Information Algorithms; SA Type - Initiate Stop SA Algorithms

Installation Options - C1-SA-INFO, SA Type- C1-SAT-INFO. These are algorithms for display of Service Agreement information in CC&B.

LLREV - Landlord Revision

SAIS-ST - This algorithm automatically stop a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

1.5 Change SA to Pending Stop/Stopped, Populate Stop Date, Add Alert for Pending Stop

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The status of the Service Agreement changes to Pending Stop/Stopped. An effective end date is populated. CC&B creates a Dashboard Alert for a service agreement with a Pending Stop.

1.6 Confirm Stop Service Information

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User confirms stop information including the mailing address for the final bill or if the address is changing for future bills for remaining active Service Agreements.

1.7 Enter Changes in Stop Information- Mailing Address

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters new information including a forwarding address. The CSR or Authorized User may change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is stopped.

1.8 Store Future Address

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The new mailing address is stored in CC&B and is updated when the Service Agreement is stopped.

1.9 Request Add Customer Contact

See **Stop Non-Premise Based Service Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User creates a Customer Contact for the customer, recording pertinent information about the change(s) for the Service Agreement.

Entities to Configure

Customer Contact Class

Customer Contact Type

2.0 Add Customer Contact

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Customer Contact information is added in CC&B.

Entities to Configure

Customer Contact Class

Customer Contact Type

2.1 Evaluate Pending Stop SA(s)

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the pending stop Service Agreement. The Customer may call and indicate they want to continue the service. It is determined to cancel the Pending Stop.

2.2 Initiate Cancel for Pending Stop

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User cancels the Pending Stop Service Agreement.

2.3 Cancel Pending Stop

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Stop Service Agreement is transitioned back to Active.

2.4.1 Update SA and Change Status to Stopped

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: When all necessary information is available, CC&B will stop the Service Agreement.

Manual Process: The CSR or Authorized User may transition the Service Agreement to Stopped as a result of exception processing.

Automated Process: CC&B will automatically transition the Service Agreement to Stopped status when all required information is made available.

Entities to Configure

SA Type

Available Algorithms

LLREV - Landlord Revision

SAIS-ST - This algorithm automatically stop a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

SAST-NB - execute additional logic that should be executed when a non-billed budget SA is stopped.

SAST-RF - This SA Type Stop algorithm refunds a service credit membership fee.

Process Names

SAACT - SA Activation The service agreement activation process updates pending start and pending stop service agreements.

2.4.1.1 Change Bill Cycle to Expedite Final Bill

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B changes the Bill Cycle when the last Service Agreement for the account is stopped to allow final bill creation.

2.4.1.2 Create Final Bill

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Batch Billing process creates the final bill for the customer.

Entities to Configure

Bill Cycle, Bill Segment Type, Customer Class, Installation Options - Billing, SA Type

Available Algorithms

Bill Segment Create Algorithms:

BSBS-BC-DFT, BSBS-BC-S, BSBS-BC-W, BSBS-BC-WS (Create bill segment using billable charges); BSBS-LO (Create bill segment for loan SA); BSBS-RA-DFT, BSBS-RB-DFT, BSBS-RT-DFT (Bill recurring charge)

Bill Segment FT Creation Algorithms:

BSBF-B0-DFT (No Payoff! Payoff=0/Current Amt=Bill Amt-no GL), BSBF-BA-DFT (Payoff Amt=Bill Amt/Current Amt=Amt Due), BSBF-CU-DFT (Company Usage! Payoff=Current=0 (GL Affected), BCBF-LO (Payoff Amt=Interest/Current Amt=Principal)

Bill Segment Information Algorithm: CI_BST-NSAID - Basic Bill Segment Information-No SA Id

Customer Class Bill Eligibility Algorithm: CI_SKIPINACC - Skip Inactive Accounts

Customer Class Pre-Bill Completion Algorithms:

CI_CPBC-TAXT Apply Taxation Threshold; CPBC-DB-PY Delete bill if only payment exists; CPBC-DMCH-E Apply De Minimis Rule

Customer Class Bill Completion Algorithms:

CI-SUP-PR-BL Suppress Printing Bills After Final Bill; CI_CN-BRT Suppress Bill Routings for credit notes; CI_CN_RADJ Reverse Adjustments When Creating Credit Note; DELTAFFMILES, UNITEDMILES Add Delta/United frequent flier miles

Customer Class Bill Segment Freeze/Cancel Algorithm: CI-BSFZ-BCH Cancel Bill Segment Billable Charges

Customer Class Post Bill Completion Algorithms:

CI_CN-ADNB Recreate Adjustments for Next Bill; CI_CR-BLRVWS Create Bill Review Schedule; CI_MULTDUDT Additional Bill Due Dates

Customer Class LPC Eligibility Rule Algorithm: LPE-DFLT Eligible if debt exceeds \$5

Available Algorithms

SA Type FT Freeze Algorithms:

CL_DEP-ARS-D Deposit SA FT Arrears Date Setup; STG PAY SPR Create FT Process for paying service provider; STG SND CONS Create FT process for sending consumption; UNIV PIF MSG Create 'Paid In Full' message when deposit paid

Customer Class FT Freeze Algorithms:

CFTZ-VAT-GL (Create Excess Credit GL Details); CI_CFTZ_COFT (OI ONLY- Cancel OI FT, keep original match event); CI_PR-CA-RVS (Prevent Cash Accounting Reversal); CNCL FT MEVT (OI ONLY-Create a Match Event for canceled FTs)

SA Type Pre-Bill Completion Algorithms:

DEL BSGE E Delete electric bill segments in error; DEL BSEG G Delete gas bill segments in error; DEL BSEG W Delete water bill segments in error

SA Type Bill Completion Algorithms:

BC-XFER A/R Transfer all FTs to service provider; BCMP-ESTBSM Add bill segment message if estimated read used; BCMP-TR-WBFT Transfer receivables to WBFT service provider; CREDIT-XFER Transfer credit balance to other SAs; NB-BCMP Bill Complete for non-billed budget

Process Names

BILLING - The Billing process creates bills for Accounts with an "Open" Bill Cycle.

ASSGNSBN - Assign sequential bill numbers if implementing sequential billing

C1-BNBAS - Assign bill document numbers if implementing document number billing

2.4.1.3 Customer Pays Final Bill

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: Customer

Description: The Customer receives and pays final bill.

2.4.1.4 4.3.1.1 Manage Payments

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters the payment in CC&B. Refer to 4.3.1.1 Manage Payments.

2.4.1.5 Close SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Agreement is automatically transitioned to Closed Status when the balance is "0".

2.4.1.6 Reactivate SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The system moves the Service Agreement to Reactivated status if a financial transaction is created after a Service Agreement is closed. When the financial balance returns to "0", the Service Agreement is transitioned to Closed again.

2.4.2 Create SA Exception To Do

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The CC&B background process, SA Activation, periodically checks to see if Service Agreements can be activated. CC&B creates an exception processing record for each Service Agreement with the Service Agreement's effective start date less than the current business date and missing or incomplete information. The Service Agreement may also be manually stopped.

Entities to Configure

To Do Type

To Do Role

Process Names

SA Activation SAACT - updates pending start and pending stop service agreements - not customizable.

TD-SSFTL To Do Creation for pending start/stops older than number of days specified. The number of day's parameter is configurable.

2.4.2.1 Investigate and Resolve To Do

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established Business Rules the CSR or Authorized User investigates possible solutions or workarounds for missing or incomplete information.

2.4.2.2 Obtain Information

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User manually enters available information in CC&B. This may require further investigation to provide necessary information.

2.4.2.3 Initiate Stop SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: When all necessary information is available, the CSR or Authorized User will manually stop the Service Agreement.

2.5 Analyze Stopped SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User may review the stopped Service Agreement. Information made available requires further evaluation. The Service Agreement may need to be canceled.

2.6 Evaluate for Cancellation

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: As part of the cancellation process it is determined there are Financial Transactions associated with the Service Agreement.

2.7 4.2.2 Manage Bill and 4.3.1.1 Manage Payments

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Subject to established business rules, the CSR or Authorized User cancels the existing Financial Transactions. An applicable Cancel Reason is selected. Refer to 4.2.2 Manage Bill and 4.3.1.1 Manage Payments.

Entities to Configure

Cancel Reason for Bill, Payment or Adjustment

2.8 Initiate Cancel SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR changes the Service Agreement status to Canceled.

2.9 Cancel SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Agreement is transitioned to a Canceled status. Canceled is a final status.

Entities to Configure

To Do Type

To Do Role

Available Algorithm(s)

SACA CRTTOD0 - Create a To Do Entry when SA Canceled

3.0 Evaluate SA to Reinstate

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and gathers available information to reinstate SA.

3.1 Reinstate SA

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User initiates the Reinstate SA function.

3.2 Update SA Status to Active

See **Stop Non-Premise Based Service Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Reinstate action in CC&B changes the status of the Service Agreement to Active. The Reinstate action can be used to reinstate a closed, reactivated, or stopped Service Agreement.

Installation Options - Control Central Alert Algorithms

PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts
CCAL WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
CCAL WFACCTR	Display active WF for account based on char
CCAL WFPREMR	Display active WF for premise based on char
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
C1_CRRT-DF	Credit Rating Alert
C1_LSSL-DF	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	Highlight Life Support/Sensitive Load on Premise
C1_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request

Standard Non-Premise Based SA Types

CHARITY	Charitable Contribution
CONNECT	Connection Charge
DE-INST	Deposit for Commercial Customer
DEP-I	Deposits
EXCSCRED	Excess Credit (overpayment)
LOAN-ST	Short Term Loans
MI-BCTX	Taxable Charges
MI-BCTXS	Taxable Charges from Service Provider
MI-CIAC	Contribution in Aid of Construction
MI-PROPT	Property Tax Payments
MI-SCMSA	Service Credit Membership
MI-SUBCH	Miscellaneous Billable Charge
MI-TBFU	They Bill for us Settlement SA
MI-UMB	Group Discount SA
MI-WBFT	We Bill for Them Merchandise
NBB-MRR	Monthly NBB(Non Billed Budget) - Monitored w/Req Renew
NBB-URR	Monthly NBB(Non Billed Budget) - Unmonitored w/Req Renew
NCIS-CON	Non CIS Payments - Connect Fee
NCIS-MTR	Non CIS Payments - Mobile Meter Permit
NCIS-PUR	Non CIS Payments - Purchasing
ONE OFF	One off charge
ONETIME	One Time charge
OVR UNDR	Cash drawer over/under expense
PA-OI	Pay arrangement (OI)
PA-REGU	Pay arrang. - Regulated debt
PA-UNRE	Pay arrang. - Unregulated debt
REBATE	Rebate Refnd
SCM RFEE	SC Membership - refundable fee
SCM SFEE	SC Membership - Std Fee (non-ref)
SPRLPC	Service Provider LPC(Late Payment Charge) SA
SUSPENSE	Uploaded payments in suspense

CHARITY	Charitable Contribution
WO-ALL	Write off inclusive of taxes
WO-BANKR	Bankruptcy write off
WO-LIAB	Write down liabilities
WO-STAND	Write off

Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks