

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

Utility Reference Model

3.4.4.3a Cancel Budget

July 2012

Oracle Utilities Customer Care and Billing Utility Reference Model 3.4.4.3a, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Cancel Budget business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 3.4.4.3a Cancel Budget

Process Type: Sub Process

Parent Process: 3.4.2. Develop Insight and Understanding

Sibling Processes: 3.4.4.2a Monitor and True Up Budget, 3.4.4.3a Enroll in Budget, 4.2.2.10a Manage Budget Billing, 4.3.1.1a Process Budget Payments, 4.3.2.1 Manage Collection Process, 3.4.1.1 Manage Customer Contacts

This process describes the process used to cancel a Budget Plan. The process can be initiated by:

- Customer Inquiry
- Collection Process Event
- Stop Service

Actors/Roles

The Cancel Budget 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

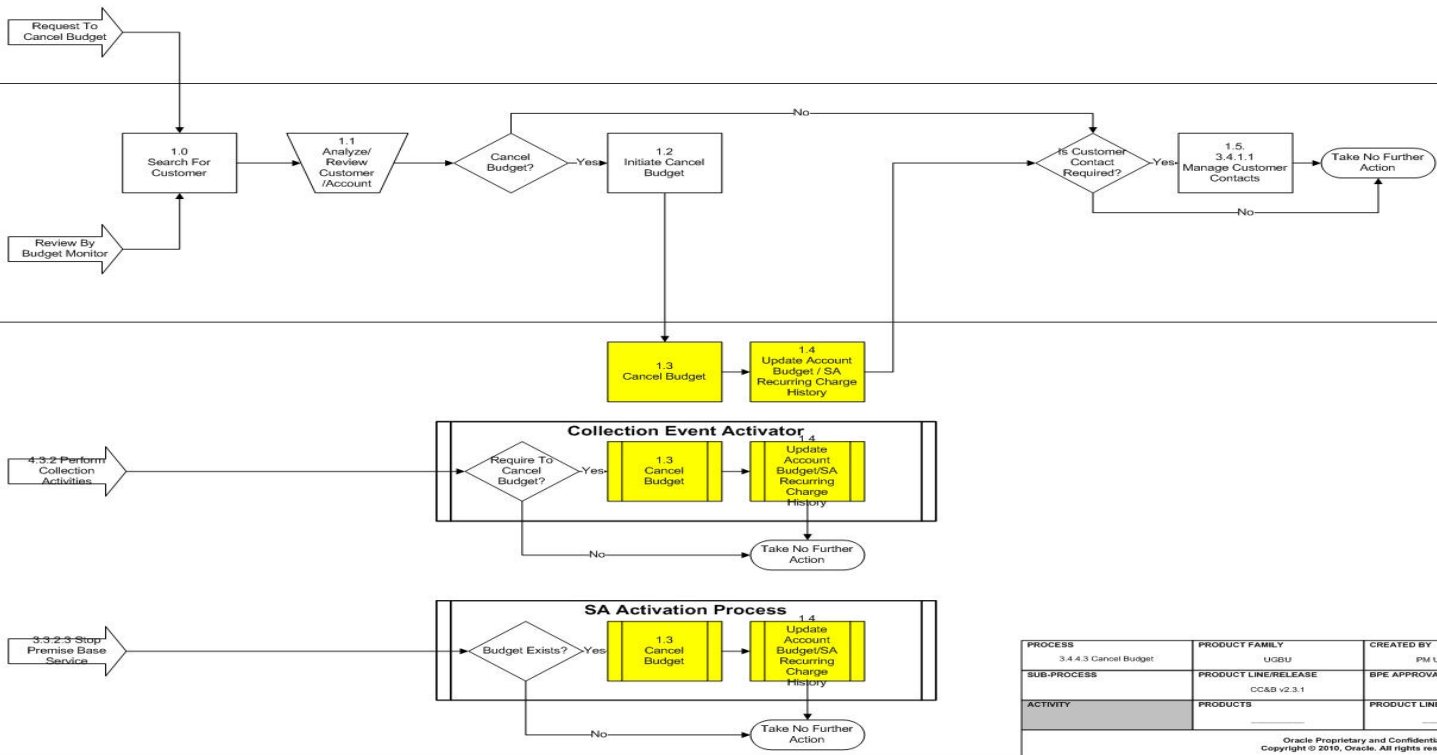
This chapter provides a detailed description of the Cancel Budget business process. This includes:

- **Business Process Diagrams**
 - **Cancel Budget**
- **Cancel Budget Description**
- **Installation Options - Control Central Alerts**
- **Related Training**

Business Process Diagrams

Budget

CC&B v2.3.1 *Cancel Budget*



PROCESS	3.4.4.3 Cancel Budget	PRODUCT FAMILY	UGBU	CREATED BY	PM URM Team	FILENAME	
SUB-PROCESS		PRODUCT LINE/RELEASE	CC&B v2.3.1	BPE APPROVAL		Page No	3
ACTIVITY		PRODUCTS		PRODUCT LINE APPROVAL		REVISED	

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Cancel Budget Description

This section includes detailed descriptions of the steps involved in the Cancel Budget business process, including:

- 1.0 Search for Customer
- 1.1 Analyze/Review Customer/Account
- 1.2 Initiate Cancel Budget
- 1.3 Cancel Budget
- 1.4 Update Account Budget/SA Recurring Charge History
- 1.5 3.4.1.1 Manage Customer Contacts

1.0 Search for Customer

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request or inquiry about canceling the Budget Plan the CSR or Authorized User accesses Control Central Search to locate the customer in CC&B. There are a number of algorithms that can be stored on Installation Options for Control Central Alerts. These algorithms provide the CSR or Authorized User with valuable insight for overall analysis of the customer.

Available Algorithm(s)

Installation Options - Control Central Alerts

1.1 Analyze/Review Customer/Account

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is dialogue with Customer. The CSR or Authorized User evaluates the account. Account Financial History, Billing History, Credit Rating, and Credit and Collection History may be reviewed.

Available Algorithm(s)

Installation Options - Control Central Alerts

1.2 Initiate Cancel Budget

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At Account level the CSR or Authorized User will cancel the Budget.

1.3 Cancel Budget

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Budget is canceled in CC&B. The system may cancel a Budget during a Collection Process (if the Collection Process contains a Cancel Budget Collection Event).

Manual Process: The CSR or Authorized User will cancel the Budget upon request or based on other established business rules.

Automated Process: If configured within Collection Process, the Collection Event Trigger will cancel a Budget.

Entities to Configure

Collection Event Type

Adjustment Type

Available Algorithm(s)

COLL COND Check if account is on a budget

Customizable Processes

The Collection Event Trigger -CET will activate a collection event to cancel the Budget

1.4 Update Account Budget/SA Recurring Charge History

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: When the Budget is canceled, any recurring charge with an effective date beyond the cancellation date is deleted. A new recurring charge amount of "0" is added for each affected Service Agreement. Each Service Agreement's Current Balance is synchronized with its payoff balance (using sync adjustment type defined on the Service Agreement's SA type). When a Service Agreement is stopped the Budget is canceled. Refer to 3.3.2.2 Stop Service.

Manual Process: When the CSR or Authorized User cancels the Budget, the Account's Service Agreement(s) Recurring Charge History, and Current Balance is updated.

Automated Process: When a covered Service Agreement is stopped the Budget is canceled. Recurring Charge History and Current Balance is updated.

1.5 3.4.1.1 Manage Customer Contacts

See **Cancel Budget** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Associated with established Business Rules the CSR or Authorized User enters necessary information about the Budget Plan for the Customer. Refer to 3.4.1.1 Manage Customer Contacts.

Installation Options - Control Central Alerts

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

Related Training

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

Oracle Utilities UPK for Customer Care and Billing, User Tasks

Oracle Utilities UPK for Customer Care and Billing, Rating and Billing

Oracle Utilities UPKc for Customer Care and Billing, Credit and Collections

