Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

4.2.1.6 Receive External Charges

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Chapter 1

Overview

This chapter provides a brief description of the Receive External Charges business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 4.2.1.6 Receive External Charges

Process Type: Sub-process

Parent Process: 4.2.1. Collect and Process Meter Reads and Miscellaneous Charges

Sibling Processes: 4.2.1.7 Apply Miscellaneous Charges, 4.2.2.4. Manage External and Miscellaneous Charges

Receive External Charges process takes place if Utility Company practices receiving charges calculated by third parties and presenting them on the customer's bill along with own charges. The process is initiated by Third Party Service Provider by calculating and sending charges toward the Utility Company that bills the Customer. These charges called "pass through" and typically include charges for:

-consumption

-miscellaneous service provided to the Customer

Utility Company receives, uploads, validates received information, creates Billable Charges and stores all the related details. These charges will be included into the next Customer's bill (see sibling process 4.2.2.4 Manage External and Miscellaneous Charges for details) and all the details associated with Billable Charge received from Third Party Service Provider (meter reads, consumption etc) will be printed on the bill

Actors/Roles

The Receive External Charges 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

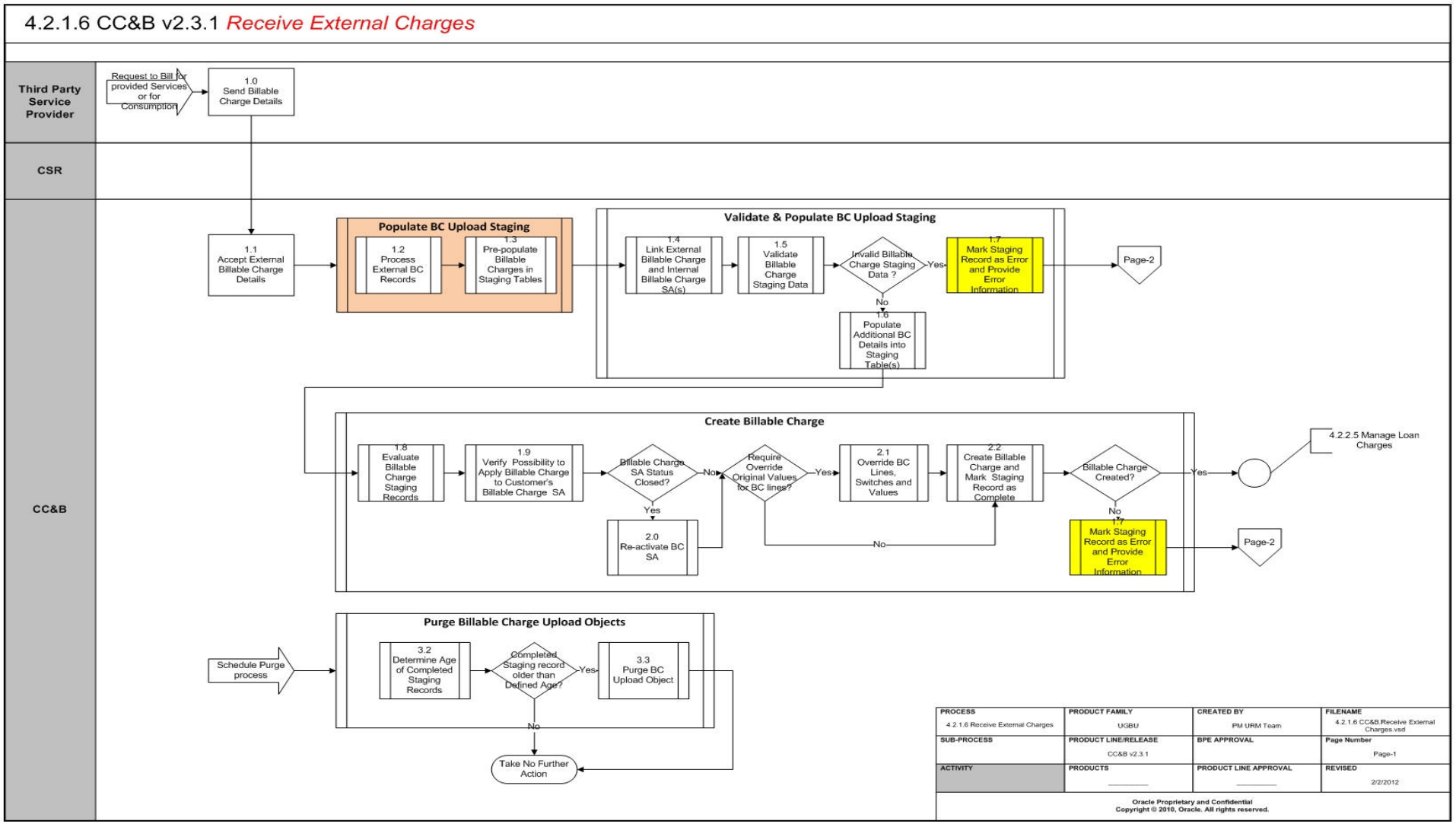
Detailed Business Process Model Description

This chapter provides a detailed description of the Receive External Charges business process. This includes:

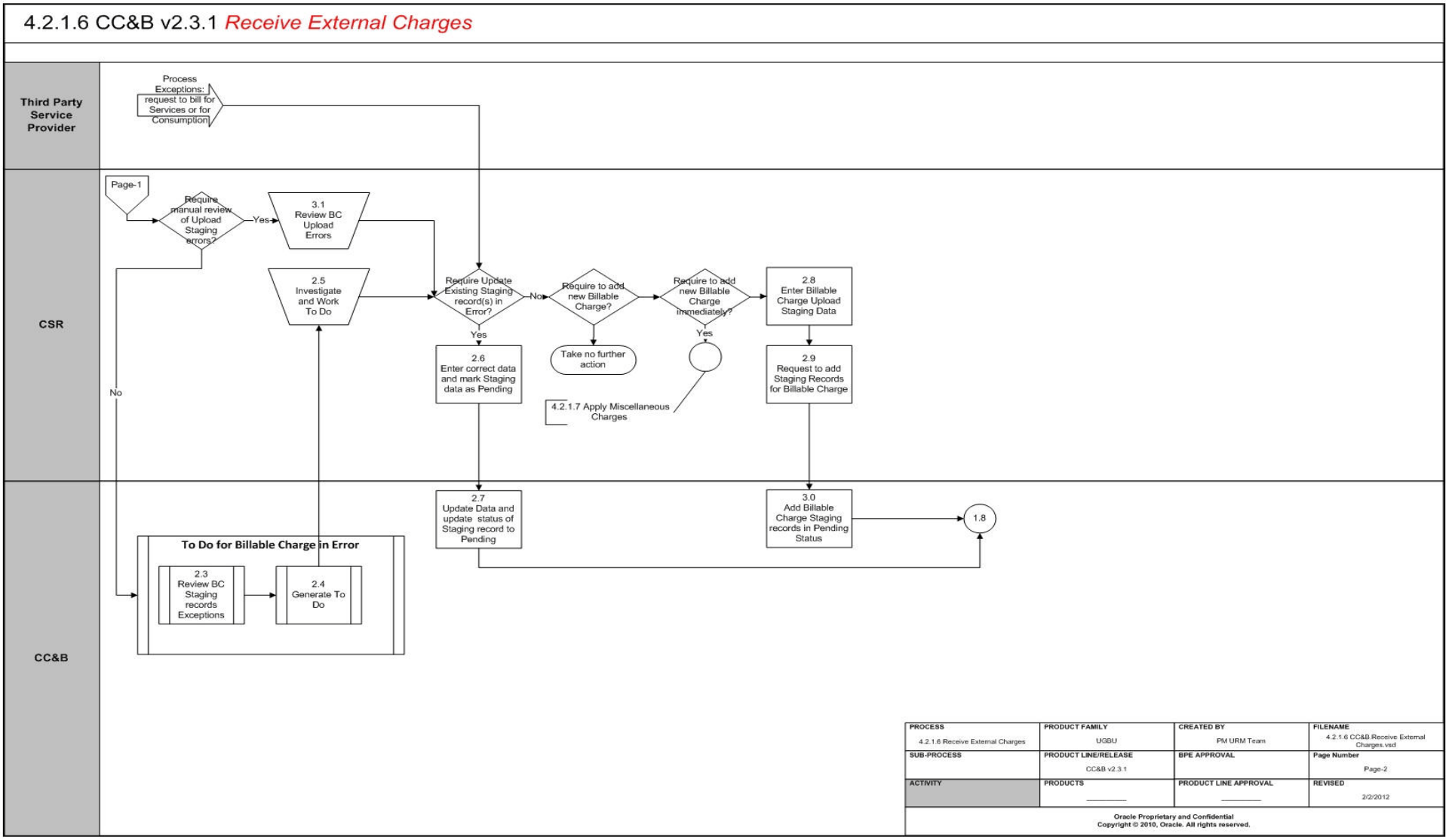
- **Business Process Diagrams**
  - **Receive External Charges Page 1**
  - **Receive External Charges Page 2**
- **Receive External Charges Description**
- **Related Training**

Business Process Diagrams

Receive External Charges Page 1



Receive External Charges Page 2



Receive External Charges Description

This section includes detailed descriptions of the steps involved in the Receive External Charges business process, including:

- **1.0 Send Billable Charge Details**
- **1.1 Accept External Billable Charge Details**
- **1.2 Process External Billable Charge records**
- **1.3 Pre-populate Billable Charge in Staging Tables**
- **1.4 Link External Billable Charge and Internal Billable Charge SA(s)**
- **1.5 Validate Billable Charge Staging Data**
- **1.6 Populate Additional BC details into Staging Table(s)**
- **1.7 Mark Staging Record as Error and Provide Error Information**
- **1.8 Evaluate Billable Charge Staging Records Group: Create Billable Charge**
- **1.9 Verify Possibility to Apply Billable Charge to Customer's Billable Charge SA**
- **2.0 Re-activate Billable Charge SA**
- **2.1 Override Billable Charge Lines, Switches and Values**
- **2.2 Create Billable Charge and Mark Staging Record as Complete**
- **2.3 Review BC Staging Records Exceptions**
- **2.4 Generate To Do**
- **2.5 Investigate and Work To Do**
- **2.6 Enter Correct Data and Mark Staging Data as Pending**
- **2.7 Update Data and Update Status of Staging Records to Pending**
- **2.8 Enter Billable Charge Upload Staging Data**
- **2.9 Request to Add Staging Records for Billable Charges**
- **3.0 Add Billable Charge Staging Records in Pending Status**
- **3.1 Review Billable Charge Upload Errors**
- **3.2 Determine Age of Completed BC Staging Records**
- **3.3 Purge Billable Charge Upload Objects**

1.0 Send Billable Charge Details

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: Third Party Service Provider

Description: This task is initiated when Third Party Service Provider wants to bill Customer for provided services. Third Party Service Provider calculates charges for consumption and /or any other type of service provided to the Customer and sends this information to the billing provider. Typically, Billable Charges information may include:

-Pre-calculated bill lines that will be presented "as is" to the customer

-Service quantities will be used by the billing system to calculate the charges

-Meter read details required to be printed on the bill

-Periodic or one time charges etc

1.1 Accept External Billable Charge Details

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Utility Company who is responsible for billing accepts External Billable Charges sent by Third Party Service Provider.

1.2 Process External Billable Charge records

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Populate BC Upload Staging

Actor/Role: CC&B

Description: System reads and initially processes External Charges received from Third Party Service Provider. This task is a part of Populate BC Upload Staging background batch process. Populate BC Upload Staging process is a custom process and it's different for each Company.

Customizable Processes
Populate BC Upload Staging

1.3 Pre-populate Billable Charge in Staging Tables

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Populate BC Upload Staging

Actor/Role: CC&B

Description: When initial processing is successful, the External Billable Charges and relevant details associated with the Billable Charges are loaded into Billable Charge Upload Staging tables. This task is also part of Populate BC Upload Staging batch process. See 1.2 Process External Billable Charge records for details.

1.4 Link External Billable Charge and Internal Billable Charge SA(s)

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Validate and Populate BC Upload Staging

Actor/Role: CC&B

Description: Customers with "pass through" charges have a separate Service Agreement to hold Billable Charges in CC&B. In this step CC&B identifies those Billable Charge Service Agreements for each External Billable Charge. This is a first step of Billable Charge Upload 1 - Validate and Populate BC Upload Staging background process.

Entities to Configure
SA Type
SA Type SA Relationship Type (Optional)
SA Relationship Type (Optional)
External System
Workflow (Optional)

Available Algorithms
CI_BCU1 - Create Pending BC Upload 1 Validate

Customizable Processes
BCU1 Billable Charge Upload 1 - Validate and Populate BC Upload Staging

1.5 Validate Billable Charge Staging Data

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Validate and Populate BC Upload Staging

Actor/Role: CC&B

Description: CC&B validates Billable Charge data stored in Staging tables.

1.6 Populate Additional BC details into Staging Table(s)

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Validate and Populate BC Upload Staging

Actor/Role: CC&B

Description: CC&B populates default information stored in CC&B if not provided by Third Party Service provider.

Entities to Configure
SA Type
Bill Charge Line External Type (Optional)

1.7 Mark Staging Record as Error and Provide Error Information

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Validate and Populate BC Upload Staging

Group: Create Billable Charge

Actor/Role: CC&B

Description: If any of the Billable Charge Staging Records didn't pass the validations or cannot be processed CC&B marks those records as error records (changes the status of the record to "Error") and stores error details.

Entities to Configure
SA Type
Bill Charge Line External Type (Optional)

1.8 Evaluate Billable Charge Staging Records Group: Create Billable Charge

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Create Billable Charge

Actor/Role: CC&B

Description: CC&B reviews and evaluates all the newly uploaded and validated Billable Charge records. This is a first step of Billable Charge Upload 2 - Create Billable Charge background process.

Entities to Configure
Workflow

Available Algorithms
CI_BCU2 - Create Pending BC Upload 2 Job

Customizable Processes
BCU2 Billable Charge Upload 2 - Create Billable Charge

1.9 Verify Possibility to Apply Billable Charge to Customer's Billable Charge SA

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Create Billable Charge

Actor/Role: CC&B

Description: CC&B verifies status of Customer's Billable Charge Service Agreement to determine if External Billable Charge can be applied

2.0 Re-activate Billable Charge SA

See **Receive External Charges Page 1** on page 2-2 for the business process diagram associated with this activity.

Group: Create Billable Charge

Actor/Role: CC&B

Description: If Customer's Billable Charge Service Agreement is closed (charges cannot be applied) CC&B re-activates it to allow system to apply External Billable Charges.

2.1 Override Billable Charge Lines, Switches and Values

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Create Billable Charge

Actor/Role: CC&B

Description: CC&B overrides the values of the various switches referenced on a Billable Charge Upload Staging lines if the Customer's Service Agreement Type has an override value.

Entities to Configure
SA Type
Bill Charge Line External Type (Optional)
Billable Charge Template

2.2 Create Billable Charge and Mark Staging Record as Complete

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Create Billable Charge

Actor/Role: CC&B

Description: System creates External Billable Charge received from Third Party Service Provider and applies it to Customer's Service Agreement.

2.3 Review BC Staging Records Exceptions

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: To Do for Billable Charge in Error

Actor/Role: CC&B

Description: CC&B reviews all the exception records that were created during Billable Charge Upload (all the Billable Charge Upload Staging records marked as error).

Customizable Processes
TD-BCUPL To Do for Billable Charge in Error

2.4 Generate To Do

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: To Do for Billable Charge in Error

Actor/Role: CC&B

Description: System creates To Do list Entry for each Billable Charge Upload Staging record in error to view and analyze error messages.

2.5 Investigate and Work To Do

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User views and investigates Billable Charge upload errors.

2.6 Enter Correct Data and Mark Staging Data as Pending

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User fixes the problem identified during investigation and enters correct data. CSR or Authorized User also changes status of Billable Charge Upload Staging record to Pending using Billable Charge Upload Staging page. It allows to re-process External Billable Charge Staging data again and attempts to create Billable Charge within CC&B.

2.7 Update Data and Update Status of Staging Records to Pending

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B performs required updates.

2.8 Enter Billable Charge Upload Staging Data

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Sometimes CSR or Authorized User identifies a need to create a new Billable Charge. In this case CSR or Authorized User also selects the way to create Billable charge. If Billable Charge has to be created and applied to Customer's Service Agreement immediately CSR or Authorized User uses Billable Charge page (see 4.2.1.7 Apply Miscellaneous Charges for details). Alternatively, CSR or Authorized User enters Billable Charge Upload Staging Data using Billable Charge Upload Staging page , then data will be processed by CC&B background processes and Billable Charges will be created and applied automatically.

2.9 Request to Add Staging Records for Billable Charges

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User requests to add a Staging Records for Billable Charge.

3.0 Add Billable Charge Staging Records in Pending Status

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: System adds new Staging Records in pending status.

3.1 Review Billable Charge Upload Errors

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User reviews specific errors using Billable Charge Upload Staging page.

3.2 Determine Age of Completed BC Staging Records

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Purge Billable Charge Upload Objects

Actor/Role: CC&B

Description: The first step of CC&B background process Purge Billable Charge Upload Objects determines age of completed BC staging records.

Customizable Processes
BCUP-PRG Purge Billable Charge Upload objects

3.3 Purge Billable Charge Upload Objects

See **Receive External Charges Page 2** on page 2-3 for the business process diagram associated with this activity.

Group: Purge Billable Charge Upload Objects

Actor/Role: CC&B

Description: System purges competed Staging records are older than number of days determined by Company's business practice.

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, Rating and Billing for Interval Data