

**Oracle Utilities CC&B V2.3.1 and MDM
V2.0.1 Integrations**

Utility Reference Model

4.2.3. Manage Bill and Billing Procedures

October 2011

Oracle Utilities CC&B V2.3.1 to MDM V2.0.1 Integration Utility Reference Model 4.2.3

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Chapter 1

Overview

This chapter provides a brief description of the MDM-CC&B Manage Bill and Billing Procedures business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 4.2.3 Manage Bill and Billing Procedures

Process Type: Process

Parent Process:

Sibling Processes:

This document describes the process that takes place when Customer Care and Billing (CC&B) requests for usage from Meter Data Management (MDM) in order to bill an account through batch or online billing. CC&B creates the request, which is then routed to MDM through the integration layer. MDM, in turn, calculates the usage based on readings upload and processed in the system.

Actors/Roles

This section outlines the actors/roles used in the Manage Bill and Billing Procedures business process.

- **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.
- **MDM Application:** The Meter Data Management system.
- **MDM Authorized User:** An authorized user of the Meter Data Management application.
- **Oracle Integration Layer:** The components that facilitate the exchange of information between the CC&B and MDM applications.

Chapter 2

Detailed Business Process Model Description

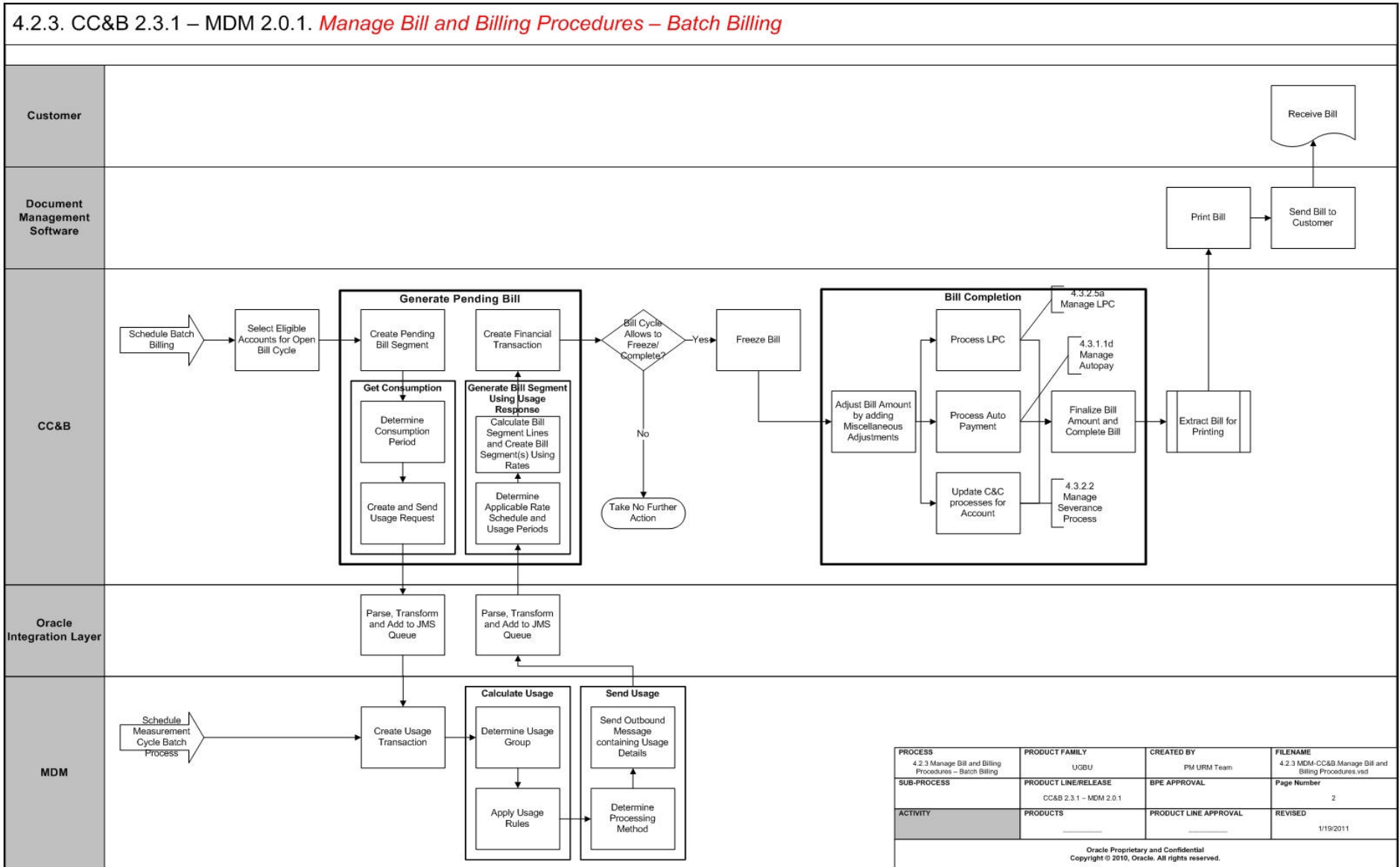
This chapter provides a detailed description of the MDM-CC&B Manage Bill and Billing Procedures business process. This includes:

- **Business Process Diagrams**
 - **Manage Bill and Billing Procedures - Batch Billing**
 - **Manage Bill and Billing Procedures - Online Billing**
- **MDM-CC&B Manage Bill and Billing Procedures Description**

Business Process Diagrams

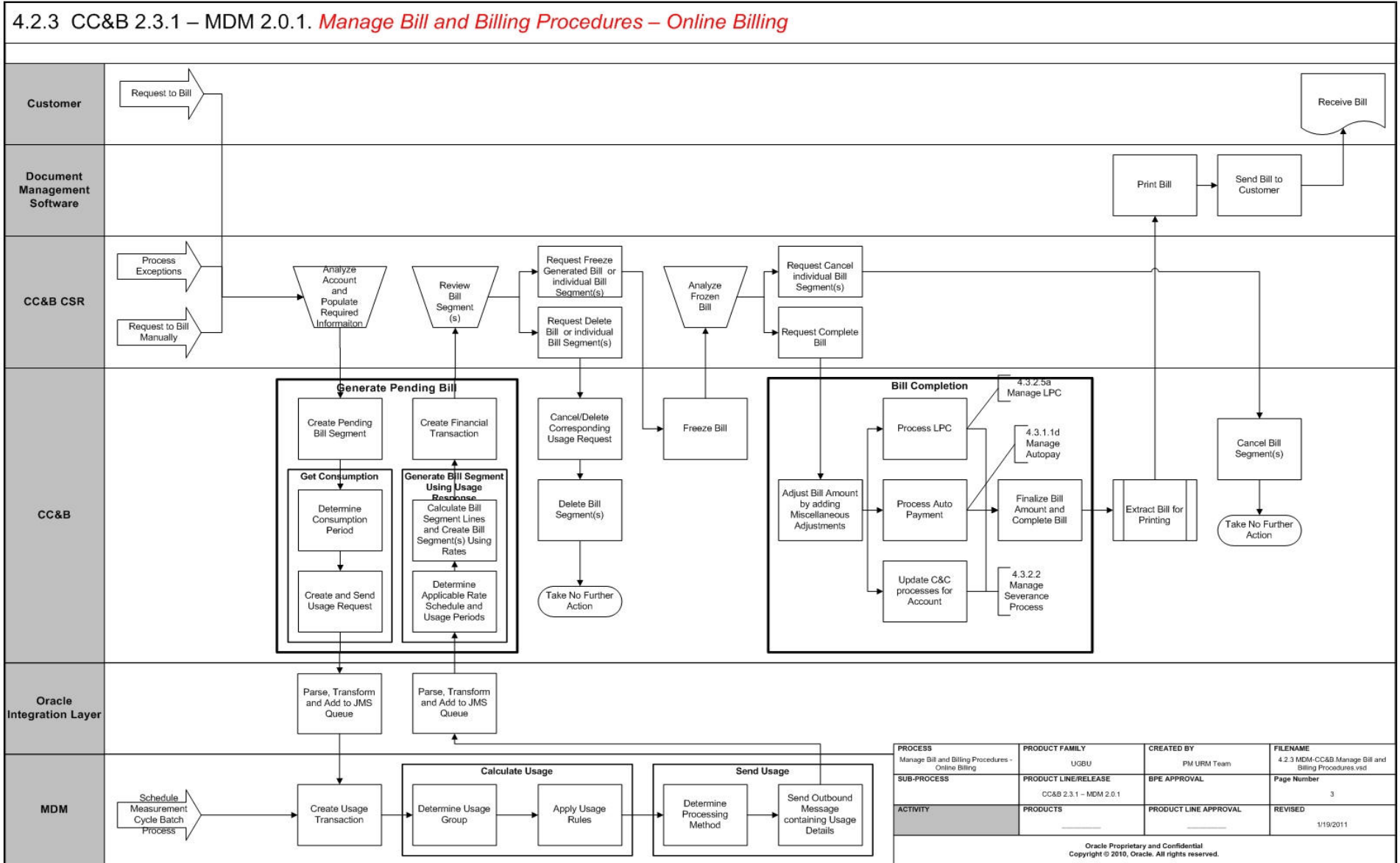
Manage Bill and Billing Procedures - Batch Billing

Business Process Diagram 1



Manage Bill and Billing Procedures - Online Billing

Business Process Diagram 1



MDM-CC&B Manage Bill and Billing Procedures Description

This section includes detailed descriptions of the steps involved in the Manage Bills and Billing Procedures business process, including:

- **Select Eligible Accounts for Open Bill Cycle**
- **Create Pending Bill Segment**
- **Determine Consumption Period**
- **Create and Send Usage Request**
- **Parse, Transform and Add to JMS Queue**
- **Create Usage Transaction**
- **Determine Usage Group**
- **Apply Usage Rules**
- **Determine Usage Group**
- **Apply Usage Rules**
- **Determine Processing Method**
- **Send Outbound Message Containing Usage Details**
- **Parse, Transform and Add to JMS Queue**
- **Determine Applicable Rate Schedule and Usage Periods**
- **Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates**
- **Create Financial Transaction**
- **Freeze Bill**
- **Adjust Bill Amount by Adding Miscellaneous Adjustments**
- **Process LPC**
- **Process Auto Payment**
- **Update Credit and Collection Processes for Account**
- **Extract Bill for Printing**
- **Print Bill**
- **Send Bill to Customer**
- **Receive Bill**
- **Analyze Account and Populate Required Information**
- **Create Pending Bill Segment**
- **Determine Consumption Period**
- **Create and Send Usage Request**
- **Parse, Transform and Add to JMS Queue**
- **Create Usage Transaction**
- **Determine Usage Group**
- **Apply Usage Rules**
- **Determine Processing Method**
- **Send Outbound Message Containing Usage Details**

- Parse, Transform and Add to JMS Queue
- Determine Applicable Rate Schedule and Usage Periods
- Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates
- Create Financial Transaction
- Review Bill Segment(s)
- Request Delete Bill or Individual Bill Segment(s)
- Cancel/Delete Corresponding Usage Request
- Delete Bill Segment(s)
- Request Freeze Generated Bill or Individual Bill Segment(s)
- Freeze Bill
- Analyze Frozen Bill
- Request Cancel Individual Bill Segment(s)
- Cancel Bill Segment(s)
- Request Complete Bill
- Adjust Bill Amount by Adding Miscellaneous Adjustments
- Process LPC
- Process Auto Payment
- Update Credit and Collection Processes for Account
- Extract Bill for Printing
- Print BillPrint Bill

Select Eligible Accounts for Open Bill Cycle

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: Using the established Bill Cycle Schedule, CC&B selects Accounts defined within a specific Open Bill Cycle. The Bill cycle's schedule controls when the system attempts to create Bills for the account. Every Bill cycle has a Bill cycle schedule that defines the dates when a cycle's accounts are to be billed. Rather than attempt to create Bills on one evening, most Bill cycles use a concept of "Window Billing" where the system attempts to produce Bills for accounts over a few nights.

Create Pending Bill Segment

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: CC&B initiates the creation of the Bill Segment.

Determine Consumption Period

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Get Consumption

Actor/Role: CC&B

Description: CC&B determines consumption to be billed. The system determines the Bill Period boundary, and next determines the Consumption Period boundary.

Automated Process: System identifies start and end date for the billing period using the same business rules as described in manual process.

The consumption period is the inclusive period passed to the Rates. It is used for calculating the charges for the Bill Segment. The system looks at every Service Point linked to the Service Agreement. The system retrieves each meter linked to each Service Point during the Bill period (a service point has multiple meters when a meter exchange has occurred during the Bill period).

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

Create and Send Usage Request

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Get Consumption

Actor/Role: CC&B

Description: CC&B creates the request for Usage to be sent to MDM. The request contains the bill segment period, as well as rate version break periods.

Note: For Batch Billing, CC&B checks if a usage request already exists for the bill segment in a non-final state (either in Pending or Awaiting Data Sync, Awaiting Bill Determinants (BD) or BD Received State). If found, then Batch Billing skips the service agreement being processed (as this might be waiting for a sync request to be completed). Otherwise, a new usage request is created for the bill segment being processed.

Parse, Transform and Add to JMS Queue

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: Oracle Integration Layer

Description: CC&B and MDM puts the requests and responses in JMS queues and the Integration Layer transforms the data from source to target application format. It will also be used for extending messages for master data mapping between CC&B and MDM and for error notifications.

Note: Any Errors in the Integration layer are reported back to the Source Response Queue and an optional error notification is sent out to pre-configured admin user(s). This way the Source application will be able to receive the error and after fixing the cause of error will be able to re-initiate the message.

Create Usage Transaction

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: MDM

Description: MDM creates the usage transaction as the initial step to calculating the usage. Also in this step, the corresponding Usage Subscription (US) is determined for the account identified in the Usage Request.

Determine Usage Group

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing-Calculate Usage

Actor/Role: MDM

Description: When calculating usage, the system determines the usage group(s).

Note: Usage group contains a collection of usage rules used to derive a usage transaction's usage using the measurements linked to the US's Service Points (SP). An individual US can have override usage group(s). If not supplied in the US, the fallback group, defined on the US type is used.

Apply Usage Rules

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Calculate Usage

Actor/Role: MDM

Description: The system applies all the usage rules to derive the usage.

Determine Processing Method

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Send Usage

Actor/Role: MDM

Description: When sending the usage, the system first determines how the usage is sent to subscribing system.

Note: In order to determine the processing method, the system looks for the service provider. This is specified in the US or the US's Usage Subscription Type.

Send Outbound Message Containing Usage Details

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Send Usage

Actor/Role: MDM

Description: MDM sends the usage by creating an outbound XML message.

Parse, Transform and Add to JMS Queue

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: Oracle Integration Layer

Description: CC&B and MDM puts the requests and responses in JMS queues and the Integration Layer transforms the data from source to target application format. It will also be used for extending messages for master data mapping between CC&B and MDM and for error notifications.

Note: Any Errors in the Integration layer will be reported back to the Source Response Queue and an optional error notification will be sent out to pre-configured admin user(s). This way the Source application will be able to receive the error and after fixing the cause of error will be able to re-initiate the message.

Determine Applicable Rate Schedule and Usage Periods

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Generate Bill Segment Using Usage Response

Actor/Role: CC&B

Description: CC&B determines the rate schedule information for the Service Agreement (SA) being processed and the accounting date for the rate application. Also, the system determines the number of unique date range periods in the usage response and retrieves the consumption for each period.

Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Generate Bill Segment Using Usage Response

Actor/Role: CC&B

Description: CC&B passes the consumption information to rates to calculate the Bill Segment. The rate components are used to build the Bill Segment calculation lines and referenced on these calculation lines.

Create Financial Transaction

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: CC&B creates the associated financial details related to the Bill Segment. The Financial Transaction contains the financial effects of the Bill Segment on the Service Agreement's current and payoff balances and on the General Ledger.

Freeze Bill

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: The Bill Segment(s) and associated Financial Transaction are frozen in CC&B. The Bill Freeze Option on the Installation Options controls when a Service Agreement's balance and General Ledger is affected by the Bill Segment and must be configured to meet the organization's accounting practices.

Adjust Bill Amount by Adding Miscellaneous Adjustments

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Bill Completion

Actor/Role: CC&B

Description: During Bill Completion, CC&B adds Adjustments, Payments or Bill corrections not included in the previous Bills to the newly created Bill.

Process LPC

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Bill Completion

Actor/Role: CC&B

Description: Late Payment Charges may be calculated during Bill Completion. Refer to 4.3.2.5a Manage Late Payment Charge.

Process Auto Payment

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Bill Completion

Actor/Role: CC&B

Description: An Autopay payment may be created during Bill Completion. Refer to 4.3.1.1d Manage Autopay.

Update Credit and Collection Processes for Account

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing - Bill Completion

Actor/Role: CC&B

Description: The status of a Severance Process can change due to Bill Completion. Refer to 4.3.2.2 Manage Severance Process.

Extract Bill for Printing

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: Typically CC&B prepares required billing data and makes data available for the Document Management application.

Note: An additional custom process may be created to interface with the Document Management Software as needed.

Print Bill

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: CC&B

Description: Document Management Software reads and process bill information produced by CC&B. It prints actual bills or prepare bills in another format (e-mail, PDF online format, short message service (SMS)).

Send Bill to Customer

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Batch Billing

Actor/Role: Document Management Software

Description: The printed Bill is sent or made available for the Customer.

Receive Bill

See **Manage Bill and Billing Procedures - Batch Billing** on page 2-2 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Print Billing

Actor/Role: Document Management Software

Description: The Customer receives the Bill.

Analyze Account and Populate Required Information

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: Document Management Software

Description: CC&B provides the CSR or Authorized User with valuable insight and overall analysis of the Customer's financial situation. The CSR or Authorized User evaluates the Customer's Account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts and other Dashboard information assist the CSR or Authorized User in determining eligibility for adding new Bill or any rebilling based on established business rules.

If the CSR or Authorized User identifies a need to create a Bill for the customer, the CSR or Authorized User provides information about the Billing period for the bill to be created. The CSR or Authorized User must specify Cutoff Date or Use Schedule to determine the end date of each Bill Segment Bill period. The Accounting Date defaults to current date however the CSR or Authorized User may change this date based on established business rules. The CSR or Authorized User may choose to allow for system estimation and will mark accordingly.

Create Pending Bill Segment

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: CC&B initiates the creation of the Bill Segment

Determine Consumption Period

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing -Get Consumption

Actor/Role: CC&B

Description: CC&B determines consumption to be billed. The system determines the Bill Period boundary, and next determines the Consumption Period boundary.

Manual Process: CSR or Authorized User provides the Bill period details if required. If not, the system defaults Bill period dates following the business rules:

Start date:

- If this is the first Bill Segment for the Service Agreement, the start date is set to the start date of the Service Agreement
- If this is the regular Bill Segment the start date is the previous Bill Segment's end date.

End Date:

- If this is the last Bill Segment for the Service Agreement, Bill Segment's the end date is the Service Agreement's end date
- If this is the regular Bill Segment end date is the end date of Bill Cycle schedule window.

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

Create and Send Usage Request

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Get Consumption

Actor/Role: CC&B

Description: CC&B creates the request for Usage to be sent to MDM. The request contains the bill segment period, as well as rate version break periods.

Note: For Online Billing, CC&B checks if a usage request already exists for the bill segment in a non-final state (either in Pending or Awaiting Data Sync, Awaiting Bill Determinants (BD) or BD Received State). If found, it implies that a user is regenerating the bill segment. The existing usage request is

cancelled or deleted (if in Pending or Awaiting Sync status) and a new usage request is created for the bill segment being processed.

Parse, Transform and Add to JMS Queue

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: Oracle Integration Layer

Description: CC&B and MDM puts the requests and responses in JMS queues and the Integration Layer transforms the data from source to target application format. It will also be used for extending messages for master data mapping between CC&B and MDM and for error notifications.

Note: Any Errors in the Integration layer will be reported back to the Source Response Queue and an optional error notification will be sent out to pre-configured admin user(s). This way the Source application will be able to receive the error and after fixing the cause of error will be able to re-initiate the message.

Create Usage Transaction

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: MDM

Description: MDM creates the usage transaction as the initial step to calculating the usage. Also in this step, the corresponding Usage Subscription (US) is determined for the account identified in the Usage Request

Determine Usage Group

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Calculate Usage

Actor/Role: MDM

Description: When calculating usage, the system determines the usage group(s).

Note: Usage group contains a collection of usage rules used to derive a usage transaction's usage using the measurements linked to the US's Service Points (SP). An individual US can have override usage group(s). If not supplied in the US, the fallback group, defined on the US type is used.

Apply Usage Rules

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Calculate Usage

Actor/Role: MDM

Description: The system applies all the usage rules to derive the usage.

Determine Processing Method

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Send Usage

Actor/Role: MDM

Description: When sending the usage, the system first determines how the usage is sent to subscribing system.

Note: In order to determine the processing method, the system looks for the service provider. This is specified in the US or the US's Usage Subscription Type.

Send Outbound Message Containing Usage Details

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Send Usage

Actor/Role: MDM

Description: MDM sends the usage by creating an outbound XML message.

Parse, Transform and Add to JMS Queue

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: Oracle Integration Layer

Description: CC&B and MDM puts the requests and responses in JMS queues and the Integration Layer transforms the data from source to target application format. It will also be used for extending messages for master data mapping between CC&B and MDM and for error notifications.

Note: Any Errors in the Integration layer are reported back to the Source Response Queue and an optional error notification is sent out to pre-configured admin user(s). This way the Source application will receive the error and after fixing the cause of error will re-initiate the message.

Determine Applicable Rate Schedule and Usage Periods

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Generate Bill Segment Using Usage Response

Actor/Role: CC&B

Description: CC&B determines the rate schedule information for the Service Agreement (SA) being processed and the accounting date for the rate application. Also, the system determines the number of unique date range periods in the usage response and retrieves the consumption for each period.

Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing - Generate Bill Segment Using Usage Response

Actor/Role: CC&B

Description: CC&B passes the consumption information to rates to calculate the Bill Segment. The rate components are used to build the Bill Segment calculation lines and referenced on these calculation lines.

Create Financial Transaction

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: CC&B creates the associated financial details related to the Bill Segment. The Financial Transaction contains the financial effects of the Bill Segment on the Service Agreement's current and payoff balances and on the General Ledger.

Review Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: The CSR or Authorized User reviews the Bill Segment for accuracy and determines the next action. The CSR or Authorized User decides if billing process could be continued, Bill Segment is incorrect, or created by mistake and needs to be deleted, rebilled, or canceled.

Request Delete Bill or Individual Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: During the review process it is determined the Bill Segment was created incorrectly or by mistake. The CSR or Authorized User requests to delete the Bill or Bill Segment. When a Bill has only one Bill segment, the Bill and the corresponding segment are deleted at the Bill level.

Note: The Bill can be deleted prior to completion when Bill Segments are Freezable or in Error status.

Cancel/Delete Corresponding Usage Request

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: If the Bill Segment being deleted has a Usage Request in Pending or Awaiting Sync status, the Usage Request is deleted. If the Usage Request is in Awaiting Bill Determinants or BD Received State, the Usage Request is cancelled with a status reason of “Related Bill Segment Deleted”.

Delete Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: The Bill is deleted in CC&B and the financial record is removed from the database. There is no financial impact to the Customer's Account.

Request Freeze Generated Bill or Individual Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: If the CSR or Authorized User does not identify a problem and decides to continue the Billing process, he/she requests to Freeze the Bill Segment(s).

Freeze Bill

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: The Bill Segment(s) and associated Financial Transaction are frozen in CC&B. The Bill Freeze Option on the Installation Options controls when a Service Agreement's balance and General Ledger is affected by the Bill Segment and must be configured to meet the organization's accounting practices.

Analyze Frozen Bill

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: CSR determines if the frozen bill should be completed or cancelled.

Request Cancel Individual Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: The Bill Segment(s) may need to be canceled and not created again. The customer's balance should not be impacted by the original transaction. The CSR or Authorized User initiates the Cancel function.

Cancel Bill Segment(s)

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: The existing Bill Segment(s) is updated to Canceled status in CC&B. If a Bill Segment is cancelled, another Financial Transaction is created to reverse the original Financial Transaction. The cancellation Financial Transaction appears on the next Bill produced for the account as a Bill correction.

Request Complete Bill

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CSR

Description: When the CSR or Authorized User cannot find any problem with the Frozen Bill Segment(s) he/she initiates the Complete Bill function.

Adjust Bill Amount by Adding Miscellaneous Adjustments

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing -Bill Completion

Actor/Role: CC&B

Description: During Bill Completion, CC&B adds Adjustments, Payments or Bill corrections not included in the previous Bills to the newly created Bill.

Process LPC

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing -Bill Completion

Actor/Role: CC&B

Description: Late Payment Charges may be calculated during Bill Completion. Refer to 4.3.2.5a Manage Late Payment Charge.

Process Auto Payment

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing -Bill Completion

Actor/Role: CC&B

Description: An Autopay payment may be created during Bill Completion. Refer to 4.3.1.1d Manage Autopay.

Update Credit and Collection Processes for Account

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing -Bill Completion

Actor/Role: CC&B

Description: The status of a Severance Process can change due to Bill Completion. Refer to 4.3.2.2 Manage Severance Process.

Extract Bill for Printing

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: CC&B

Description: Typically CC&B prepares required billing data and makes data available for the Document Management application.

Note: An additional custom process may be created to interface with the Document Management Software as needed.

Print Bill

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: Document Management Software

Description: Document Management Software reads and process bill information produced by CC&B. It prints actual bills or prepare bills in another format (e-mail, PDF online format, short message service (SMS)).

Send Bill to Customer

See **Manage Bill and Billing Procedures - Online Billing** on page 2-3 for the business process diagram associated with this activity.

Group: Manage Bill and Billing Procedures - Online Billing

Actor/Role: Document Management Software

Description: The printed Bill is sent or made available for the Customer.