

**Oracle Utilities Customer Care and Billing  
Release 2.5.0**

Utility Reference Model

3.3.5 Establish and Maintain Loan

August 2016

Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 3.3.5 Establish and Maintain Loan

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## 3.3.5 Establish and Maintain Loan

This section provides a description of the “Establish and Maintain Loan” business process, including:

- ♦ [Brief Description](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Establish and Maintain Loan Process Model - Page 1](#)

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## Brief Description

**Business Process:** 3.3.5 CC&B v2.5 Establish and Maintain Loan

**Process Type:** Process

**Parent Process:** n/a

**Sibling Processes:** n/a

This process describes business events that take place if Customer's request for Loan is satisfied by Utility Organization. When the customer enters into a Loan with the organization, Loan terms and conditions and other significant details of the contract are documented and set up within application, regular billing occurs with a due date for loan payments. Loans are stopped and closed when amount Customer owes the Organization is fully paid off.

Examples of loans can include:

- Conservation options for insulation and high-energy furnaces
- Service extensions for new construction or Service upgrades
- Products that promote the services of the organization

**Note:** Loans are separate Service Agreements and hold the loan terms, including the loan amount, periodic payment amount, number of payment periods, interest rate, and billing frequency based on configurable business rules.

# Business Process Diagrams

## Establish and Maintain Loan Process Model - Page 1

