Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

3.3.6.3 Stop Premise Based Service For Landlord/
Tenant

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Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 3.3.6.3 Stop Premise Based Service For Landlord/Tenant

Contents

3.3.6.3 Stop Premise Based Service For Landlord/Tenant

3.3.6.3 Stop Premise Based Service For Landlord/Tenant

This section provides a description of the "Stop Premise Based Service For Landlord/Tenant" business process, including:

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    - Actors/Roles
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- Stop Premise Based Service For Landlord/Tenant Detailed Process Model Description
- Installation Options - Control Central Alert Algorithms
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Brief Description

Business Process: 3.3.6.3 CC&B v2.5 Stop Premise Based Service For Landlord/Tenant

Process Type: Sub-Process

Parent Process: 3.3.2 CC&B v2.5 Manage Service Agreement

Sibling Processes:

- 3.3.2.1 CC&B v2.5 Start Premise Based Service
- 3.3.2.3 CC&B v2.5 Stop Premise Based Service
- 3.3.2.2 CC&B v2.5 Start Non-Premise Based Service
- 3.3.2.4 CC&B v2.5 Stop Non-Premise Based Service
- 3.3.6.2 CC&B v2.5 Start Premise Based Service For Landlord - Tenant
- 3.3.3.2 CC&B v2.5 Determine Customer Deposit
- 3.3.1.1 CC&B v2.5 Establish Person and/or Account
- 3.4.1.1 CC&B v2.5 Manage Customer Contacts
- 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders
- 3.4.4.1a CC&B v2.5 Enroll in Budget
- 3.4.4.1b CC&B v2.5 Enroll in Non-Billed Budget
- 4.3.2.1 CC&B v2.5 Manage Collection Process
- 5.1.5.1 CC&B v2.5 Manage Metered Site

This process describes the Stop process for Premise based service for when a landlord is responsible for the property between tenants, or when the Service is transferring from tenant to tenant.

When a landlord is associated with a property and would like to have service reverted when a tenant moves out, a contract called a Landlord Agreement is established in the system. The Landlord can indicate preferences for each type of service provided at the property. The landlord can choose to have seasonal preferences. It is possible some services may not revert at all depending on the landlord's preferences. An Account is established to use for reversion of service and then associated with the Landlord Agreement. Based on configured business rules the system uses the information defined on landlord agreement to create a Service Agreements for the landlord when service for an existing tenant is stopped.

Many organizations need to group and manage multi-unit properties quickly and effectively. The organization can make use of Premise Management functionality to assist with large multi unit properties. If configured, Premise Management functionality can facilitate grouping of Premises together under a defined single premise called a Parent Premise. It can provide for a single view of properties for a landlord, including status of service. Premise Management functionality provides the ability to change landlord or service status for a group of premises at the same time in one transaction.

Actors/Roles

The Stop Premise Based Service For Landlord/Tenant 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.
- **Field Operations**: Company or department that provides operational support, coordinates and performs field work (installation, repair, maintenance, investigations etc. that allows Utilities to provide services to customers).

Business Process Diagrams

Stop Premise Based Service For Landlord/Tenant Process Model - Page 1

3.3.6.3 CC&B v2.5 *Stop Premise Based Service for Landlord - Tenant*

Customer/ Landlord	Request to Stop Service for Landlord			
CSR				
CC&B				

Customer/Landlord
- Request to Stop Service for Landlord

CSR
- Request to Stop Service for Landlord
- 1.0 Search for Landlord Customer
- Premise has Landlord Agreement? — Yes / No
- 3.3.2.3 CCB.v2.5.Stop Premise Based Service
- Existing Pending Stop for Landlord? — No / Yes
- Update? — Yes → 2.0 / No → Take No Further Action
- 1.1 Select Service(s) and Request Stop
- 1.6 Confirm Stop Information - Mailing Address — No
- Mailing Address Different after Stop? — No / Yes
- 1.7 Enter Changes - Mailing Address
- Requires Meter Read? — No → Page 2 / Yes
- Use Scheduled Read? — No → Page 7 / Yes
- Complete FA Using Recent Meter Read 5.3.2.1 CCB.v2.5.Manage Field Activities-Field Orders

CC&B
- Stop SA
- 1.2 Populate End Date, Update SA to Pending Stop, and Unlink SA/SP
- 1.3 Add Pending Stop Alert
- Requires Pending Start for New Tenant? — Yes
- 3.3.6.2 CCB.v2.5.Start Premise Based Service for Landlord - Tenant
- Requires Field Activity? — Yes
- 1.5 Create FA 5.3.2.1 CCB.2.5.Manage Field Activities and Field Orders
- Take No Further Action
- 1.8 Store Future Mailing Address

PROCESS 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE CC&B v2.5	BPE APPROVAL	Page Number Page-1
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/6/2015

Stop Premise Based Service For Landlord/Tenant Process Model - Page 2

3.3.6.3 CC&B v2.5 *Stop Premise Based Service for Landlord Tenant*

Stop Premise Based Service For Landlord/Tenant Process Model - Page 3

3.3.6.3 CC&B v2.5 *Stop Premise Based Service for Landlord - Tenant*

Customer/Landlord

Request to Stop Service

Request Update Stop Service

CSR

Request to Stop Service → 3.7 Search for Tenant → Existing Pending Stop SA? —No→ 1.4 Select Service(s) and Request Stop → 1.6 Confirm Stop Information - Mailing Address → Mailing Address Different after Stop? —No→ Requires Meter Read? —No→ 4.0 Evaluate Pending Stop SA for Existing Tenant → Update Existing Pending Stop SA? —No→ Page 4

Existing Pending Stop SA? —Yes→ Update Existing Pending Stop SA? —Yes→ 4.0

Update Existing Pending Stop SA? —No→ Take No Further Action

Mailing Address Different after Stop? —Yes→ 1.7 Enter Changes - Mailing Address

Requires Meter Read? —Yes→ Use Scheduled Read? —No→ Page 7

Use Scheduled Read? —Yes→ Complete FA Using Recent Meter Read 5.3.2.1 CCB.v2.5.Manage Field Activities and Field Orders

4.0 Evaluate Pending Stop SA for Existing Tenant → 2.1 Determine Impact for Pending Stop SA → Change Stop Service Date? —Yes→ Pending Start Exists? —No→

Change Stop Service Date? —No→ 2.2 Make Changes

Pending Start Exists? —Yes→ Pending Start for Landlord? —No→

Pending Start for Landlord? —Yes→ 4.1 Request Change Dates for Pending Stop SA

1.8 Store Future Mailing Address

CC&B

Stop SA

1.2 Populate End Date, Update SA to Pending Stop, and Unlink SA/SP → Requires Pending Start for New Tenant? —No→ 3.9 Landlord Reversion Add Pending Start SA for Landlord and Link SA/SP → Requires Field Activity? —No→

1.2 → 1.3 Add Pending Stop Alert

Requires Pending Start for New Tenant? —Yes→ 3.8 3.3.6.2 CCB.v2.5.Start Premise Based Service for Landlord - Tenant

Requires Field Activity? —Yes→ 1.5 Create FA 5.3.2.1 CCB.v2.5.Manage Field Activities and Field Orders

Take No Further Action

2.3 Update Existing Pending Stop SA → 4.0

4.2 Update Existing Pending Stop SA with New Stop Date → 4.3 Update LL Pending Start SA with New Start Date → Associated FA? —No→ 4.0

Associated FA? —Yes→ 2.8 Update FA 5.3.2.1 CCB.v2.5.Manage Field Activities and Field Orders

PROCESS 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE CC&B v2.5	BPE APPROVAL	Page Number Page-3
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/6/2015

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Stop Premise Based Service For Landlord/Tenant Process Model - Page 4

3.3.6.3 CC&B v2.5 *Stop Premise Based Service for Landlord - Tenant*

Stop Premise Based Service For Landlord/Tenant Process Model - Page 5

3.3.6.3 CC&B v2.5 *Stop Premise Base Service for Landlord - Tenant*

Customer/ Landlord

6.0
Receives Bill

Take No Further Action

CSR

5.4

5.4.2.1

5.4.1.1
Investigate and Resolve Error

Existing To Do Entry?

No → Is Meter Read Available?

No → 5.4.1.4
Obtain Meter Read Information

Yes → 5.4.1.2
Request Complete To Do

Yes → 3.4
Initiate Stop SA

3.3.3.1 CCB.v2.5.Refund Deposit
3.4.4.3a CCB.v2.5.Cancel Budget
3.3.4.3b CCB.v2.5.Cancel Non-Billed Budget
4.3.2.1 CCB.v2.5.Manage Collection Process
4.3.2.2 CCB.v2.5.Manage Severance Process

5.4.1.3
Complete to Do

3.5
Update SA and Change Status to Stopped

Take No Further Action

CC&B

Page 2

Page 4

3.3.1.4

Service Agreement Activation Process

5.3
Identify Pending Stop Service Agreements Ready to Stop

Stop Date ≤ Current Date and Read Exists?

Yes → 3.5
Update SA and Change Status to Stopped

No →

5.4
Highlight Exceptions

No

Is This Account's Last Active Premise-Based SA?

No →

Yes

Create To Do Entry?

3.5.1
Identify Active Non-Premise Based SA(s) Requires Auto-Stop

SA Found?

Yes → 3.3.2.4 Stop a Non-Premise-Based Service

Yes

5.4.2.1
Create To Do Entry

No

5.4.1.1

Create Final Bill – 4.2.2 Manage Bill

5.5
Change Bill Cycle to Expedite Final Bill

5.6
Generate Final Bill

5.7
Extract Bill for Printing

Schedule Service Agreement Activation Process

Document Management Software

5.8
Print Bill

5.9
Send Bill to Customer

PROCESS 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE CC&B v2.5	BPE APPROVAL	Page Number Page-5
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/6/2015

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Stop Premise Based Service For Landlord/Tenant Process Model - Page 6

3.3.6.3 CC&B v2.5 *Stop Premise-Based Service for Landlord - Tenant*

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant	UGBU	PM URM Team	3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE	BPE APPROVAL	Page Number
	CC&B v2.5		Page-6
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED
			10/6/2015

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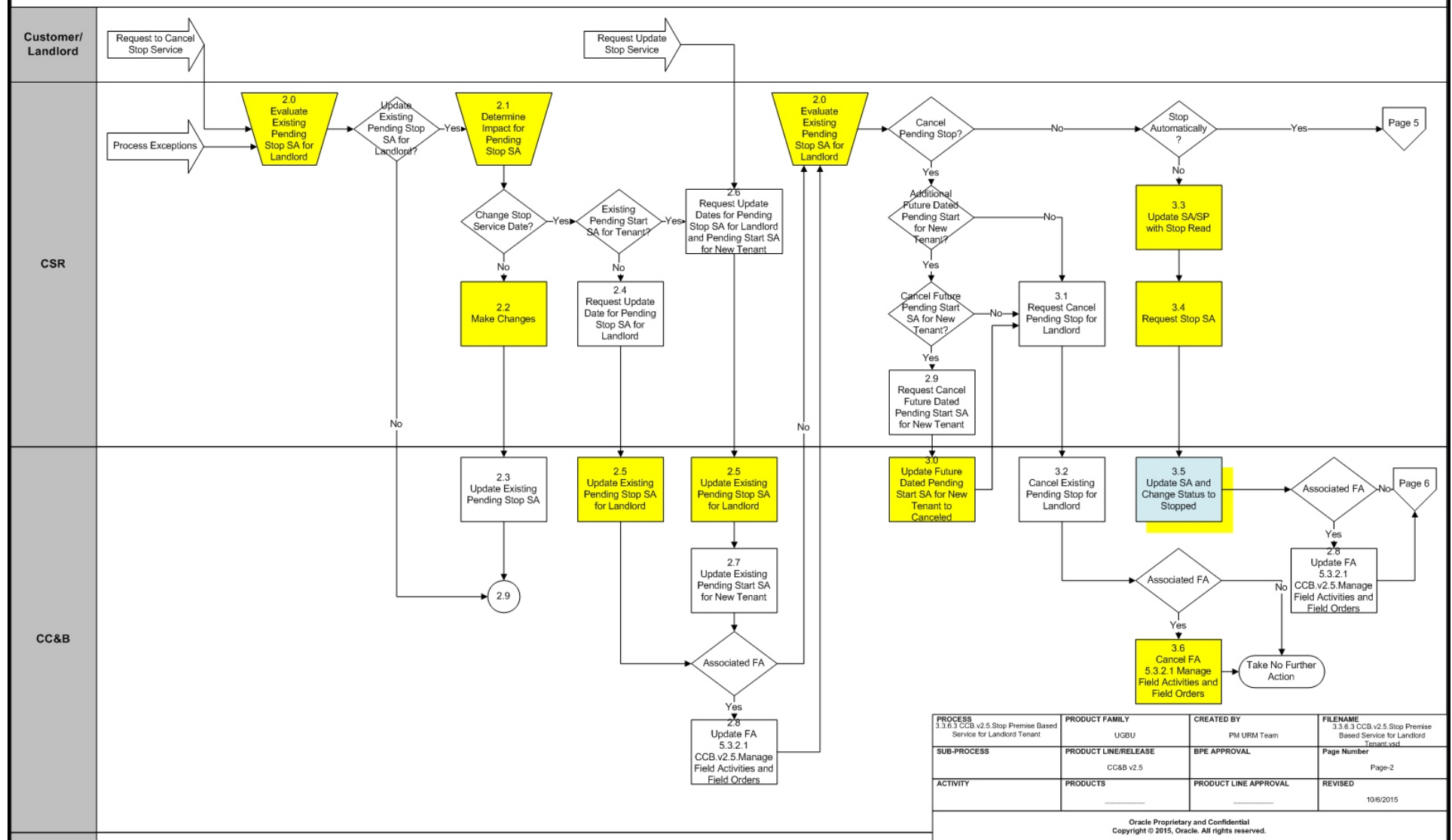Copyright © 2015, Oracle. All rights reserved.

Stop Premise Based Service For Landlord/Tenant Process Model - Page 7

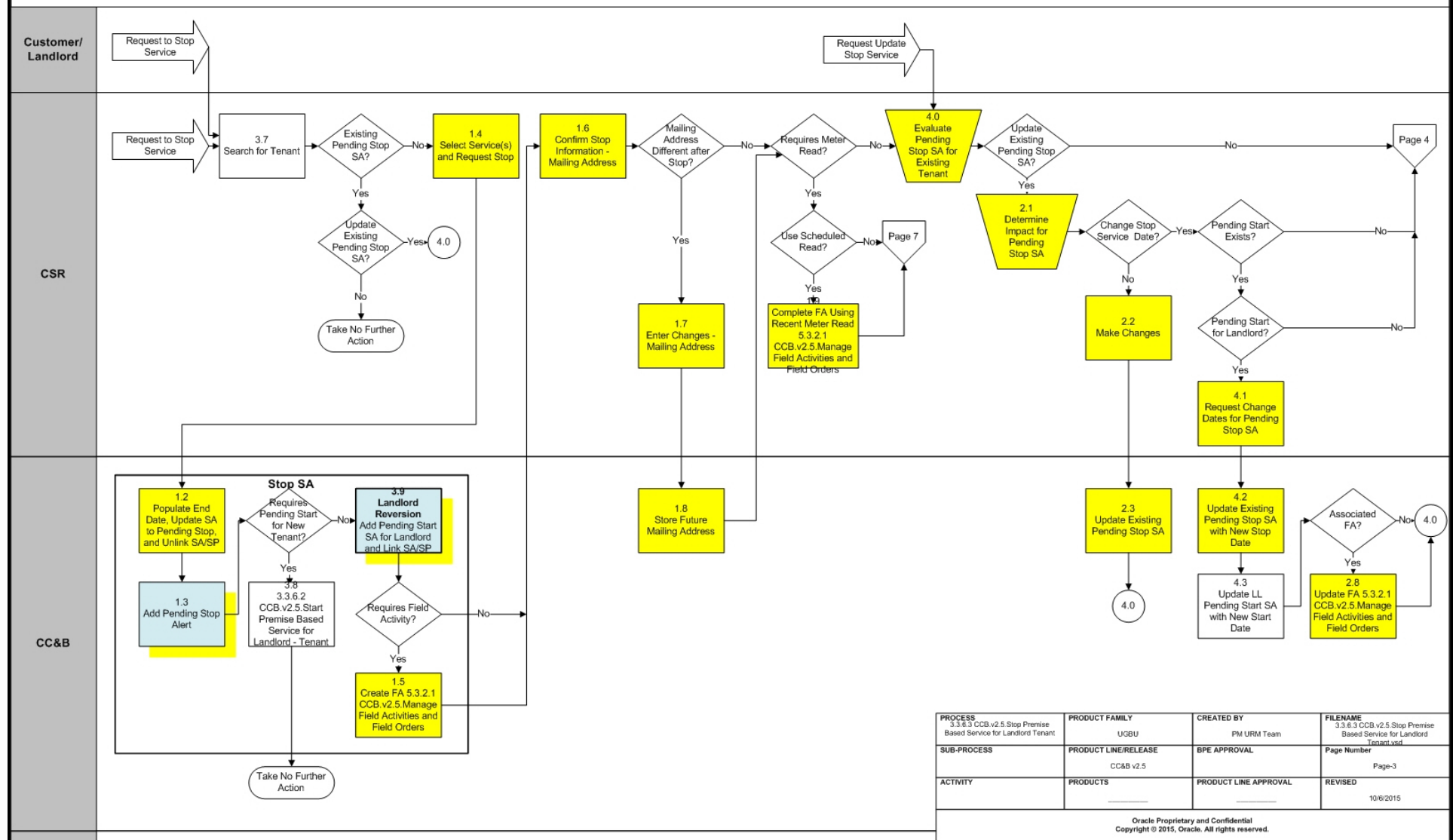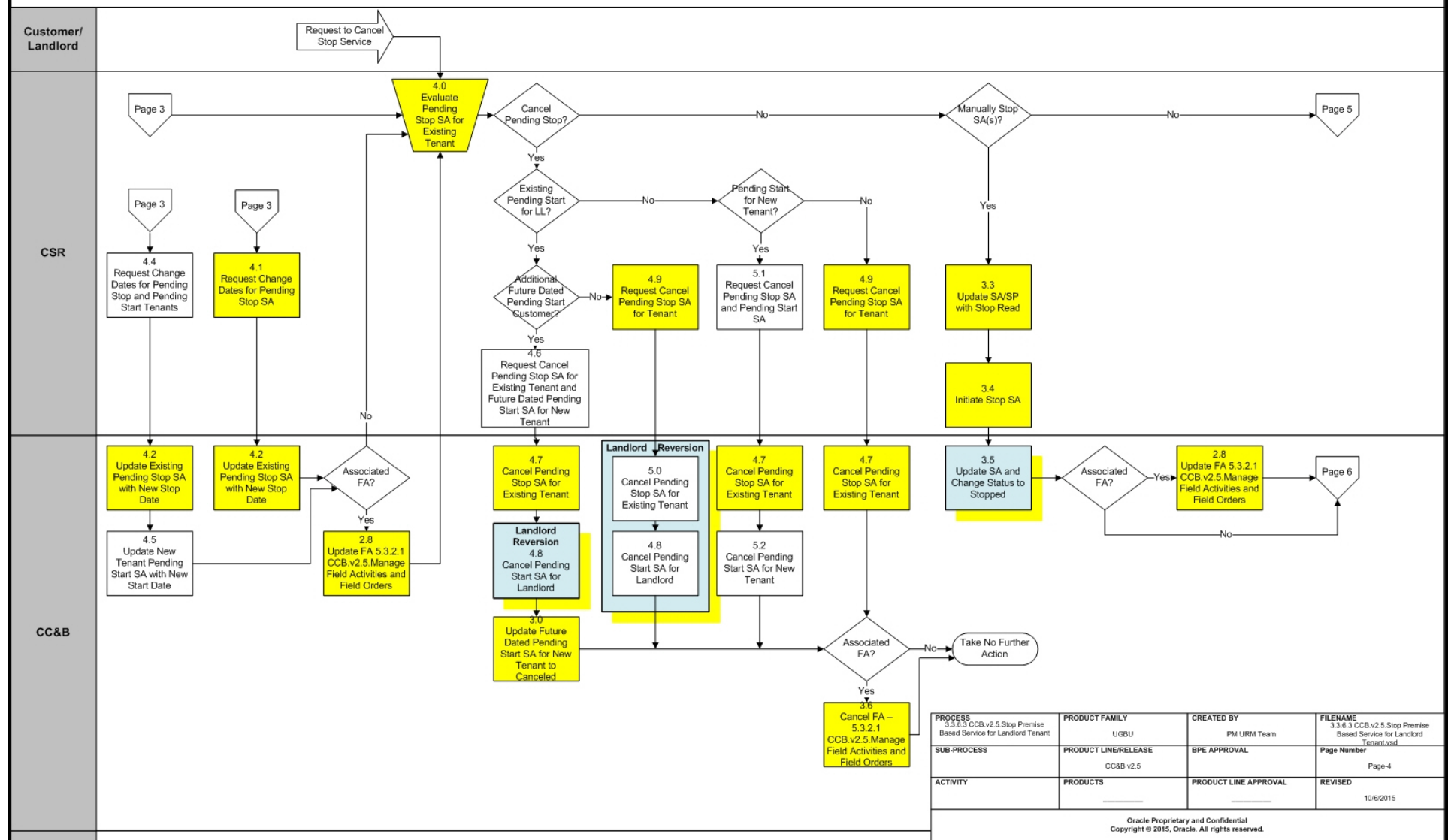## 3.3.6.3 CC&B v2.5 *Stop Premise Based Service for Landlord - Tenant*
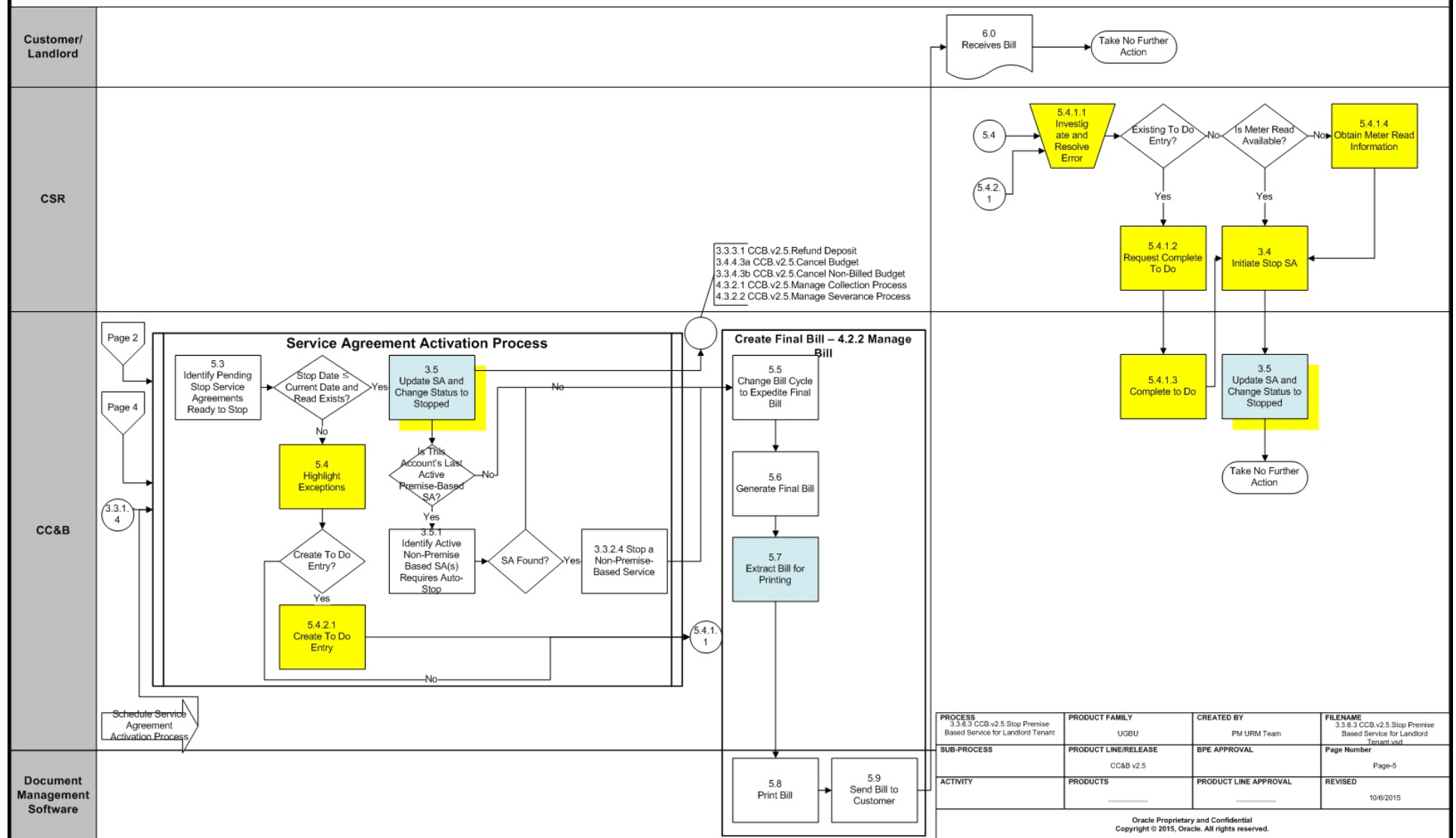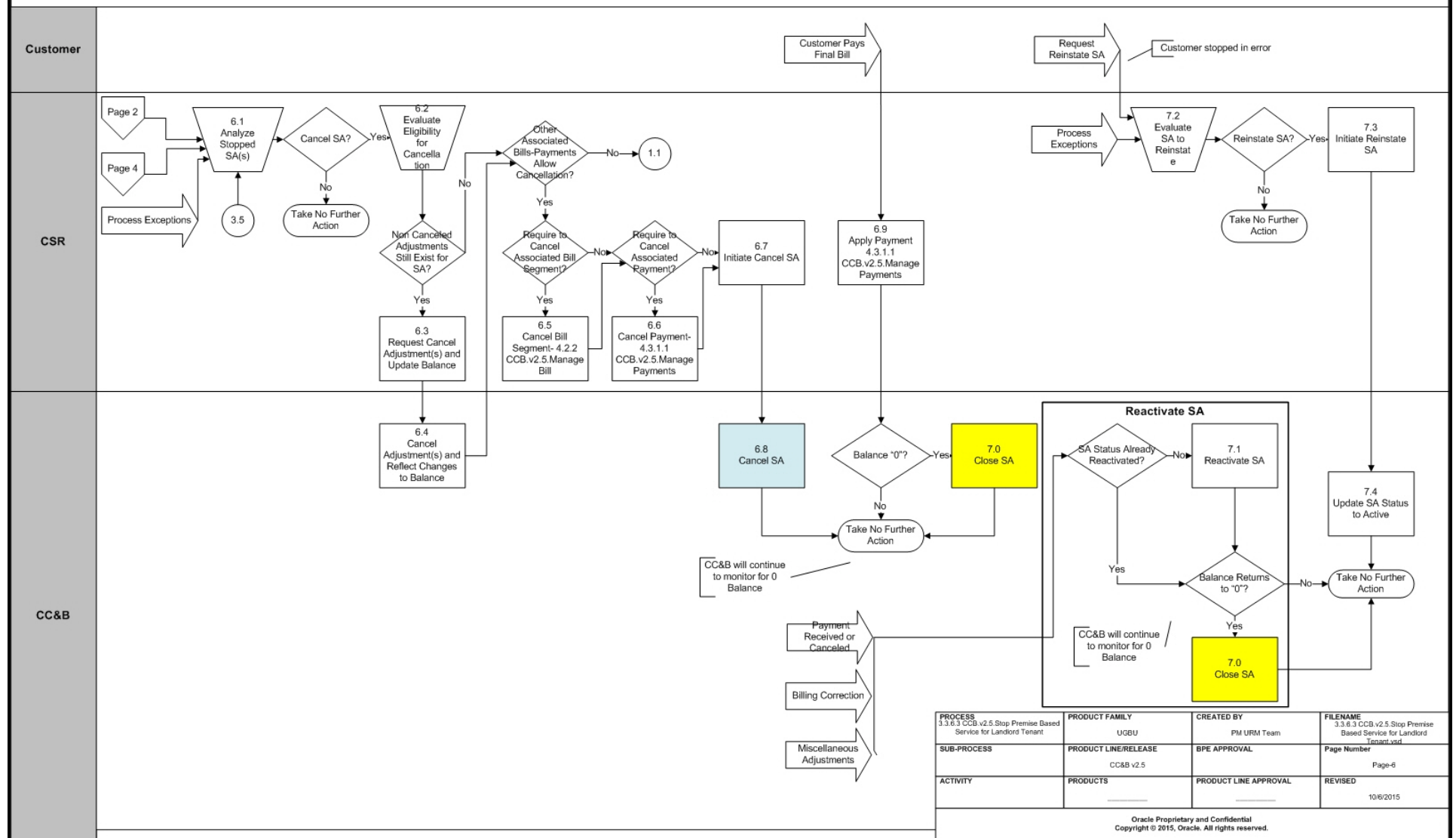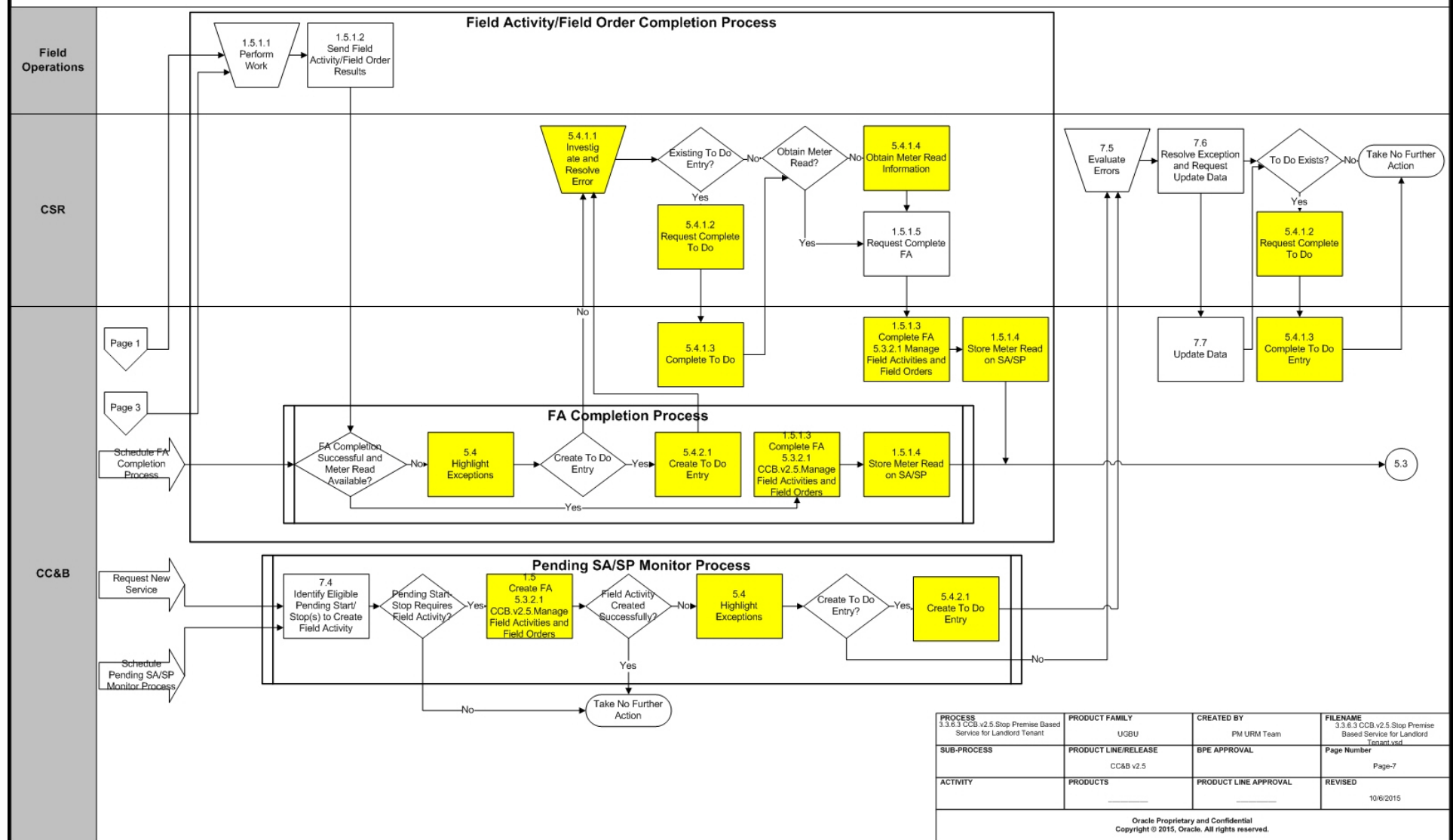
Field Operations

Field Activity/Field Order Completion Process

- 1.5.1.1 Perform Work
- 1.5.1.2 Send Field Activity/Field Order Results

CSR

- 5.4.1.1 Investigate and Resolve Error
- Existing To Do Entry? — No → Obtain Meter Read? — No → 5.4.1.4 Obtain Meter Read Information
- Yes
- 5.4.1.2 Request Complete To Do
- Yes → 1.5.1.5 Request Complete FA
- 7.5 Evaluate Errors
- 7.6 Resolve Exception and Request Update Data
- To Do Exists? — No → Take No Further Action
- Yes
- 5.4.1.2 Request Complete To Do

CC&B

- Page 1
- Page 3
- 5.4.1.3 Complete To Do
- 1.5.1.3 Complete FA 5.3.2.1 Manage Field Activities and Field Orders
- 1.5.1.4 Store Meter Read on SA/SP
- 7.7 Update Data
- 5.4.1.3 Complete To Do Entry

FA Completion Process

- Schedule FA Completion Process
- FA Completion Successful and Meter Read Available? — No → 5.4 Highlight Exceptions → Create To Do Entry — Yes → 5.4.2.1 Create To Do Entry → 1.5.1.3 Complete FA 5.3.2.1 CCB.v2.5.Manage Field Activities and Field Orders → 1.5.1.4 Store Meter Read on SA/SP
- Yes
- 5.3

Pending SA/SP Monitor Process

- Request New Service
- Schedule Pending SA/SP Monitor Process
- 7.4 Identify Eligible Pending Start/ Stop(s) to Create Field Activity → Pending Start Stop Requires Field Activity? — Yes → 1.5 Create FA 5.3.2.1 CCB.v2.5.Manage Field Activities and Field Orders → Field Activity Created Successfully? — No → 5.4 Highlight Exceptions → Create To Do Entry? — Yes → 5.4.2.1 Create To Do Entry
- Yes
- No
- No → Take No Further Action

PROCESS 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.6.3 CCB.v2.5.Stop Premise Based Service for Landlord Tenant.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE CC&B v2.5	BPE APPROVAL	Page Number Page-7
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/6/2015

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Stop Premise Based Service For Landlord/Tenant Detailed Process Model Description

This section provides a detailed description of the "Stop Premise Based Service For Landlord/Tenant" business process, including:

1.0 Search for Customer - Landlord

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 1 on page 3 for the business process diagram associated with this activity.**Actor/Role:** CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (landlord) in CC&B using Control Central Search. 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 Starts.

Entities to Configure
- Installation Options - Framework

Available Algorithms
- CI_PER-INFO - This person information algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
- CI_PER-NM-VL - Person Name Validation
- CI_ACCT-INFO - This algorithm formats the "Account Information" that appears throughout the system.

1.1 Select Services and Request Stop

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 1 on page 3 for the business process diagram associated with this activity.**Actor/Role:** CSR

Description: The CSR or Authorized User selects Service Agreements to stop.

The CSR or Authorized User is presented with the following choices:

- 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 - Framework
- SA Type

Available Algorithms
- CI_SAT-NOBAL, CI_SAT-NRT - This SA Type algorithm formats the "SA Information" that appears throughout the system.
- CI_SAI-STD - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.

1.2 Populate End Date, Update SA Status to Pending Stop and Unlink SA/SP

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Group: Stop SA

Actor/Role: CC&B

Description: When service is stopped for a landlord or tenant, the Service Agreement is updated to Pending Stop. The status of the Service Agreement changes to Pending Stop. The SA/SP link is

populated with an effective end date (stop) date. A Field Activity may be created if configured. CC&B links the Field Activity to the SA/SP.

1.3 Add Pending Stop SA Alert

Reference: for the business process diagram associated with this activity.

Group: Stop SA

Actor/Role: CC&B

Description: CC&B creates a Dashboard Alert for the Pending Stop Service Agreement.

Entities to Configure
- Installation Options - Framework

Available Algorithms
- C1-STOP-SA- Highlight Stopped SA's

1.4 3.3.6.2 CC&B v2.5 Start Premise Based Service For Landlord - Tenant

Reference: for the business process diagram associated with this activity.

Group: Stop SA

Actor/Role: CSR

Description: After confirming that service for a new tenant is required, refer to 3.3.6.2 CC&B v2.5 Start Premise Based Service For Landlord - Tenant.

1.5 Create FA 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders

Reference: for the business process diagram associated with this activity.

Group: Stop SA

Actor/Role: CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the stop read is made available in **CC&B**. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Stop Service Agreement can be transitioned to Stopped status. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

Process Names
- PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
- FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

Entities to Configure
- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control
- Batch Control
- SA Type

Available Algorithms
- CI_SASPFWCRE – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist and check for back to back.
- C1-FAIN-INFO - This Installation algorithm formats the "FA Information" that appears throughout the system.
- C1-FAAD-INFO - Formats the field activity additional information that appears on the field activity page.
- C1-DGRP-DFLT – Default Dispatch Group on a Field Activity.
- CI_FACCHARGE – FieldActivity Completion – this algorithm applies charges by creating an adjustment.

1.5.1.1 Perform Work

Reference: for the business process diagram associated with this activity.

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: A technician is dispatched to the field to obtain read, and/or connect, or perform other tasks. This represents a combined set of processes that includes dispatching, performing the work, recording of a read or other activity at the site, and uploading results.

1.5.1.2 Send Field Activity/Field Order/ Results

Reference: for the business process diagram associated with this activity.

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: The Field Operations office communicates and returns the Field Activity/Field Order results. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders, 4.2.1.1a Read Meters and 4.2.1.2a Load Meter Reads.

Process Names
- Process for Populating MR Upload Staging and FA Upload Staging are custom. MUP1 and MUP2 reference the background processes for populating the meter configuration and creating the meter read

1.5.1.3 Complete FA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group:

- Field Activity Completion
- Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

Process Names

- PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
- FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

Entities to Configure

- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control
- SA Type
- Installation Options - Framework

Available Algorithms

- CI_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist and check for back to back.
- C1-FAIN-INFO - This Installation algorithm formats the "FA Information" that appears throughout the system.
- C1-FAAD-INFO - Formats the field activity additional information that appears on the field activity page.
- C1-DGRP-DFLT - Default Dispatch Group on a Field Activity
- C1_FACCHARGE - Field Activity Completion - this algorithm applies charges by creating an adjustment.

1.5.1.4 Store Meter Read on SA/SP

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group:

- FA Completion Process
- Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: The meter read associated with the Start Service Agreement is stored in CC&B and available for the background process, Service Agreement Activation, to activate or stop the Service Agreement. This read is now linked or unlinked to the SA/SP.

- **Manual Process**: The CSR or Authorized User uses this meter read information entered to manually complete the Field Activity.
- **Automated Process**: CC&B links the read to the Service Point associated with the newly activated or stopped Service Agreement.

1.5.1.5 Request Complete FA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: The CSR or Authorized User manually completes the Field Activity using the meter read information.

1.6 Confirm Stop Service Information - Mailing Address

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is dialogue with the Customer. Stop information is confirmed including a forwarding mailing address.

1.7 Make Changes - Mailing Address

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 1 on page 3 for the business process diagram associated with this activity.**Actor/Role:** CSR

Description: After confirming the change The CSR or Authorized User enters required information in CC&B. These changes could be updates for the Account or Person record, i.e. Mailing address. These changes do not impact start or stop dates. The system defaults to mailing premise. The CSR or Authorized User can change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is Stopped or Activated.

Entities to Configure
- Postal Code Default
- Installation Options
- Bill Route Type
- Country

1.8 Store Future Mailing Address

Reference: for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The mailing address information is stored until the Service Agreement is transitioned to Stopped status.

1.9 Complete FA Using Recent Read 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders

Reference: for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: If configured, CC&B can use a recent scheduled read rather than requiring a separate trip to obtain a read in the field. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

2.0 Evaluate Pending Stop SA for Landlord

Reference: for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the pending stop Service Agreement. It may be determined the Service Request needs to be canceled. Request to Stop Service was in error. The customer (landlord) may call and indicate they are not stopping service at this time. A new tenant may cancel a Start Service Request. The landlord needs to continue to assume responsibility for the given Premise. The CSR or Authorized User may need to manually stop the Service Agreement to expedite final Billing or to process an anomaly.

2.1 Determine Impact for Pending Stop SA

Reference: for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Before any changes or updates are made for a Pending Stop SA for a tenant or landlord, the CSR or Authorized User reviews how the changes impact the existing Pending Stop SA or other related Starts or Stops.

2.2 Make Changes

Reference: for the business process diagram associated with this activity.

Actor/Role: CSR

Description: After confirming the change The CSR or Authorized User enters required information in CC&B. These changes could be updates for the Account or Person record, i.e. Mailing address. These changes do not impact start or stop dates. The system defaults to mailing premise. The CSR or Authorized User can change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is Stopped or Activated.

2.3 Update Existing Pending Stop SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Stop SA for the landlord is updated in CC&B.

2.4 Request Update Date for Pending Stop SA for Landlord

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There may be a Pending Stop SA for the landlord without a new customer (tenant) signing for service at the Premise. The CSR or Authorized User enters date changes for the Pending Stop SA for the landlord.

2.5 Update Existing Pending Stop SA for Landlord

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Stop SA for the landlord is updated in CC&B.

2.6 Request Update Dates for Pending Stop SA for Landlord and Pending Start SA for New Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on information received and established business rules, The CSR or Authorized User changes dates for the Pending Stop SA for the landlord and Pending Start SA for the new tenant.

2.7 Update Existing Pending Start SA for New Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Start SA for the new tenant is updated in CC&B.

2.8 Update FA 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: An existing Pending Field Activity and/or Field Order require updating. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

2.9 Request Cancel Future Dated Pending Start SA for New Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: There is a request to cancel the Pending Stop for the landlord. There is also an existing future dated Pending Start SA for a new tenant that requires cancellation of the Pending Start.

3.0 Update Future Dated Pending Start SA for New Tenant to Canceled

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The future dated Pending Start SA for the new tenant is canceled in CC&B.

3.1 Request Cancel Pending Stop for Landlord

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Description: The CSR or Authorized User cancels the Pending Stop for the Landlord. The services were stopped in error or the landlord or the landlord is continuing responsibility for the property at this time.

3.2 Cancel Existing Pending Stop for Landlord

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Stop Service Request is canceled in CC&B.

3.3 Update SA/SP with Stop Read

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the stop date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective stop date.

3.4 Request Stop SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User manually stops the Service Agreement in CC&B.

3.5 Update SA and Change Status to Stopped

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Group: Service Agreement Activation Process

Actor/Role: CC&B

Description: The Service Agreement status is transitioned to stopped in CC&B.

- **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.

Process Names
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

Entities to Configure
- SA Type

Available Algorithms
- CI_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement
- CI_NB-SAST - Execute additional logic that should be executed when a non-billed budget SA is stopped.
- CI_REFMFEE - This SA Type Stop algorithm refunds a service credit membership fee.
- C1-SAIS-ST - This algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

3.5.1 Check for Active Non-Premise Based SAs with Auto-Stop Flag

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: If the SA is the account's last active premise-based service, CC&B proceeds to stop account's remaining active non-premise based services configured with auto-stop indicator. Refer to 3.3.2.4 Stop Non Premise Based Service.doc.

Process Names
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

Entities to Configure
- SA Type

3.6 Cancel FA 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Refer to 5.3.2.1 for canceling Field Activities.

3.7 Search for Customer - Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (tenant) in CC&B using Control Central Search. 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 Starts.

Entities to Configure
- Installation Options - Framework

Available Algorithms
- CI_PER-INFO - This Installation algorithm formats the "Person Information" that appears throughout the system.

3.8 3.3.6.2 CC&B v2.5 Start Premise Based Service For Landlord - Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Group: Stop SA

Actor/Role: CC&B

Description: When an existing tenant stops service, a new tenant may also be starting service. Refer to 3.3.6.2 CC&B v2.5 Start Premise Based Service For Landlord - Tenant.

3.9 Add Pending Start SA for Landlord and Link SA/SP

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Group:

- Stop SA
- Landlord Reversion

Actor/Role: CC&B

Description: If configured, service for the Landlord is started automatically. A new Service Agreement will be started and the Service Point Information will be linked to the Service Agreement.

Entities to Configure
- SA Type

Available Algorithms
- CI_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement

4.0 Evaluate Pending Stop SA for Existing Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User can review the Pending Stop Service Agreement at different times during the stop processing. Updates to mailing address, Account or Person

information, or a change in dates is required. Prior to the Service Agreement transitioning to stopped, it is determined the Pending Stop is in error and requires canceling. The Customer (tenant) may call and indicate they are not moving in or taking responsibility for utility charges for the given Premise. They may request to cancel the request to start. The CSR or Authorized User may need to manually start the Service Agreement to expedite Billing or process an anomaly.

4.1 Request Change Dates for Pending Stop SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: After review, the CSR or Authorized User determines to change the stop date for the existing tenant. A Pending Start SA may exist for the landlord.

4.2 Update Existing Pending Stop SA with New Stop Date

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Stop SA is updated with a new date in CC&B.

4.3 Update LL Pending Start SA with New Start Date

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Start SA for the landlord is updated in CC&B. The start date matches the stop date for the existing tenant.

4.4 Request Change Dates for Pending Stop and Pending Start Tenants

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is a Pending Stop and a Pending Start for existing and new tenants. The CSR or Authorized User determines to change the stop dates for the existing tenant. The pending stop dates for the new tenant require change also.

4.5 Update New Tenant Pending Start SA with New Start Date

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The existing Pending Start SA is updated with new start date in CC&B.

4.6 Request Cancel Pending Stop SA and Future Dated Pending Start SA for Tenants

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The existing tenant has decided not to move out. There is a Pending Start SA for the landlord and in addition, a future dated Pending Start SA for a new tenant. The CSR or Authorized User cancels the existing stop and the future dated pending start for the new tenant. The landlord's Pending Start SA is automatically canceled.

4.7 Cancel Existing Pending Stop SA for Existing Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The existing Pending Stop SA is canceled in CC&B.

4.8 Cancel Pending Start SA for LL

Group: Landlord Reversion

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Pending Start SA for the landlord is updated to canceled in CC&B.

4.9 Request Cancel Pending Stop SA for Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: There is a Pending Stop for an existing tenant and may be a Pending Start for the Landlord. The CSR or Authorized User determines to cancel the Pending Stop SA for the existing Tenant.

5.0 Cancel Pending Stop SA for Existing Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Group: Landlord Reversion

Actor/Role: CC&B

Description: The Pending Stop SA for the existing tenant is updated to canceled in CC&B.

Entities to Configure
- SA Type

Available Algorithms
- CI_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement.

5.1 Request Cancel Pending Stop SA and Pending Start SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is a Pending Stop SA for an existing tenant and a Pending Start SA for a new tenant. This is considered a back-to-back scenario. The CSR or Authorized User determines to cancel the Pending Stop and the Pending Start.

5.2 Cancel Pending Start SA for New Tenant

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 4 on page 6 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Pending Start SA for the new tenant is canceled in CC&B.

5.3 Identify Pending Stop Service Agreements Ready to Stop

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Service Agreement Activation Process

Actor/Role: CC&B

Description: The Service Agreement Activation background process, SAACT, periodically checks and selects Service Agreements with a stop read and stop Date less than or equal to the current date. This background process then attempts to transition the Service Agreement to Stopped status.

- **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 Active status when all required information is made available.

Process Names
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

5.4 Highlight Exceptions

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group:

- Service Agreement Activation Process
- FA Completion Process
- Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: The background process, SAACT, Service Agreement Activation, periodically verifies whether or not Service Agreements can be stopped. CC&B creates an exception processing record for each Service Agreement with the Service Agreement's effective stop date less than the current date and with missing or incomplete information. A separate background process creates To Do Entries for Pending Start/Stops that are older than a configured date. To Do Type and To Do Roles must also be configured. The FA Completion process will also create exception records for Field Activities with missing or incomplete information.

Process Names
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.
- TD-SSFTL To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

Entities to Configure
- To Do Types
- To Do Roles
- SA Type
- Batch Control

5.4.1.1 Investigate and Resolve Error

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Field Activity/Field Order Completion Process

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for the missing or incomplete information related to Service Agreement transition or Field Activity Completion. The CSR or Authorized User enters this information in CC&B.

5.4.1.2 Request Complete To Do

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Field Activity/Field Order Completion Process

Actor/Role: CSR

Description: If the background process creates a To Do Entry, the CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry once the error is resolved. The CSR or Authorized User may add comments or a log entry for future reference.

Entities to Configure
- To Do Types
- To Do Roles

5.4.1.3 Complete To Do

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Field Activity/Field Order Completion Process

Actor/Role: CC&B

Description: The To Do Entry is updated to Complete status in CC&B.

Entities to Configure
- To Do Types
- To Do Roles

5.4.1.4 Obtain Meter Read Information

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Field Activity/Field Order Completion Process

Actor/Role: CSR

Description: The read may not be readily available. The CSR or Authorized User manually enters available information in CC&B. This may require creation of a new Field Activity, estimated read, or further investigation to provide necessary read information.

5.4.2.1 Create To Do Entry

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group:

- Service Agreement Activation Process
- FA Completion Process
- Pending SA/SP Monitor Process
- Field Activity/Field Order Completion Process

Actor/Role: CC&B

Description: If configured, To Do Entries are created for exception processing. The exception is also available for viewing and resolution on a separate page in CC&B.

Process Names
- TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error.
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.
- TD-SSFTL To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

Entities to Configure
- To Do Types
- To Do Roles

5.5 Change Bill Cycle to Expedite Final Bill

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 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 for final bill creation.

5.6 Generate Final Bill

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 5 on page 7 for the business process diagram associated with this activity.

Group: Create Final Bill - 4.2.2 CC&B v2.5 Manage Billing

Actor/Role: CC&B

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

Process Names
- BILLING - The billing process creates bills for accounts with an "open" bill cycle.

Entities to Configure
- Bill Cycle
- Bill Segment Type
- Customer Class
- Installation Options - Billing
- Installation Options - Framework
- SA Type

Available Algorithms
- CI_BSEG-INFO - Bill Segment Information Algorithm
- C1-SKIPINACC - Customer Class Bill Eligibility Algorithm that will skip inactive accounts
- Customer Class - Pre-Bill Completion Algorithm Types:
    - C1-CPBC-TAXT Apply Taxation Threshold
    - CPBC-DB Delete bill if only payment exists
    - CPBC-DMCH Apply De Minimis Rule
- Customer Class - Bill Completion Algorithms:
    - C1-SUP-PR-BL Suppress Printing Bills After Final Bill
    - C1-CN-BRT Suppress Bill Routings for credit notes
    - C1-CN-RADJ Reverse Adjustments When Creating Credit Note
- Customer Class - Bill Segment Freeze/Cancel Algorithm Type
    - C1-BSFZ-BCH Cancel Bill Segment Billable Charges
- Customer Class - Post Bill Completion Algorithm Types:
    - C1_CN-ADNB Recreate Adjustments for Next Bill
    - C1_CR-BLRVWS Create Bill Review Schedule
    - C1-MULT-DUDT Additional Bill Due Dates
    - WX-SSBNOTIFY - Set Bill Notifications for Self-Service
- Customer Class - FT Freeze Algorithm Types:
    - CFTZ-VAT-GL Create Excess Credit GL Details - UK VAT only
    - C1-CFTZ-COFT (OI ONLY- Cancel OI FT, keep original match event)
    - C1-PR-CA-RVS Prevent Cash Accounting Reversal
    - CNCL FT MEVT OI ONLY-Create a Match Event for canceled FTs
- Customer Class - LPC Eligibility Rule Algorithm:
    - CI_LPC-EL5 Eligible if debt exceeds $5
- SA Type FT Freeze Algorithms:
    - C1-DEP-ARSDT 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

- • CI_DEPPIFMSG Create 'Paid In Full' message when deposit paid
- • SA Type Pre-Bill Completion Algorithms:
  - • DEL BSEG Delete Bill Segments in Error
- • SA Type - Bill Completion Algorithms:
  - • BCMP-ESTBSM Create an estimate read bill message
  - • BCMP-NB NBB Credit Transfer
  - • BCMP-TR Check for We Bill For Them Service Provider
  - • C1-PYOF-DBT Payoff Account's Debt using Credit SA balance
  - • CREDIT-XFER Transfer Credit from the Credit SA
  - • TBFU XFER Check for They Bill For Us Service Providers
  - • C1-TRN-TUM Transition True Up Monitor
  - • C1-CREPPBBM Create Prepay Biller Bill Message

5.7 Extract Bill for Printing

Reference: for the business process diagram associated with this activity.

Group: Create Final Bill - 4.2.2 CC&B v2.5 Manage 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.

Process Names
- • POSTROUT - Create postal bill routing
- • EMAILRTE - Create email bill routing
- • Custom Extract Process

Entities to Configure
- • CI_BLEX - Create XML bill extract records for Documaker.

5.8 Print Bill

Reference: for the business process diagram associated with this activity.

Group: Create Final Bill - 4.2.2 CC&B v2.5 Manage 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 on-line format, short message service (SMS)).

5.9 Send Bill to Customer

Reference: for the business process diagram associated with this activity.

Group: Create Final Bill - 4.2.2 CC&B v2.5 Manage Billing

Actor/Role: Document Management Software

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

6.0 Receives Bill

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: Customer

Description: The Customer receives the final bill.

6.1 Analyze Stopped SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the Stopped Service Agreement. Information becomes available that requires further evaluation. The Service Agreement may need to be canceled. The customer may call and indicate they are not moving in to the given Premise. The customer (landlord or tenant) may request to cancel the original request after the Service Agreement is stopped.

6.2 Evaluate Eligibility for Cancellation

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times a Service Agreement requires cancellation. Typically this occurs when the Service Agreement was created and then stopped in error. As part of the cancellation process, the CSR or Authorized User determines if any associated financial transactions for the Active Service Agreement require cancellation. All financial transactions (bills, payments or adjustments) must be canceled before a Service Agreement can transition to Canceled status.

6.3 Request Cancel Adjustments and Update Balance

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User cancels applicable adjustments in order to cancel the Service Agreement. The Service Agreement balance is updated accordingly.

Entities to Configure
- Adjustment Cancel Reason

6.4 Cancel Adjustments and Reflect Changes to Balance

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Agreement balance is updated in CC&B to reflect the adjustment cancellation.

Entities to Configure
- Adjustment Cancel Reason
- Adjustment Type

Available Algorithms
- ADCA-CRTODO Adjustment Cancellation - Create To Do Entry

6.5 Cancel Bill Segment - 4.2.2 CC&B v2.5 Manage Bill

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Refer to 4.2.2 CC&B v2.5 Manage Bill for cancellation of Bill Segments.

6.6 Cancel Payment 4.3.1.1 CC&B v2.5 Manage Payments

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Refer to 4.3.1.1 CC&B v2.5 Manage Payments for cancellation of Payments.

6.7 Initiate Cancel SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: When all financial transactions are canceled, the CSR or Authorized User changes the Service Agreement to Canceled.

6.8 Cancel SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 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. If configured, a To Do entry can be created when a Service Agreement is canceled.

Entities to Configure
- To Do Type
- To Do Role
- SA Type

Available Algorithms
- SACA-CRTODO - SA Cancellation - Create To Do Entry

6.9 Apply Payment 4.3.1.1 CC&B v2.5 Manage Payments

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 6 on page 8 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User applies a Payment for the Account. This could also be an electronic payment. Refer to 4.3.1.1 CC&B v2.5 Manage Payments.

7.0 Close SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group: Reactivate SA

Actor/Role: CC&B

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

7.1 Reactivate SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group: Reactivate SA

Actor/Role: CC&B

Description: The system moves the Service Agreement to Reactivated status if certain Financial Transactions are created after a Service Agreement is closed. When the financial balance returns to "0", the Service Agreement is closed again.

7.2 Evaluate SA to Reinstate

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 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.

7.3 Initiate Reinstate SA

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Actor/Role: CSR

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

7.4 Update SA Status to Active

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 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.

7.4 Identify Eligible Pending Start/Stops to Create Field Activity

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Group:

- Pending SA/SP Monitor Process
- Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: The Pending SA/SP Monitor Process selects and creates Field Activities for Pending Starts and Stops if the Field Activity is not already created and is required.

> **Process Names**
> - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

7.5 Evaluate Errors

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 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.

7.6 Resolve Exception and Request Update Data

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters required information in CC&B to resolve the exception. This may include creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

7.7 Update Data

Reference: Stop Premise Based Service For Landlord/Tenant Process Model - Page 7 on page 9 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Any resolution or change information is updated in CC&B.

Installation Options - Control Central Alert Algorithms

The following installation options are available:

Value	Description
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-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 SAs
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, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data