

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

Utility Reference Model

4.2.1.7 Apply Miscellaneous Charges

August 2016

Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 4.2.1.7 Apply Miscellaneous Charges

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## 4.2.1.7 Apply Miscellaneous Charges

This section provides a description of the “Apply Miscellaneous Charges” business process, including:

- ♦ [Brief Description](#)
  - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Apply Miscellaneous Charges Process Model - Page 1](#)
- ♦ [Apply Miscellaneous Charges Detailed Process Model Description](#)
- ♦ [Related Training](#)

## Brief Description

**Business Process:** 4.2.1.7 CC&B v2.5 Apply Miscellaneous Charges

**Process Type:** Sub-process

**Parent Process:** 4.2.1. CC&B v2.5 Collect and Process Measurements

**Sibling Processes:**

- 4.2.1.6 CC&B v2.5 Receive External Charges
- 4.2.2.4. CC&B v2.5 Manage External Charges and Miscellaneous Charges
- 3.3.2.2 CC&B v2.5 Start Non-Premise Based Service

The Apply Miscellaneous Charges process takes place whenever Utility Company provides the service that occurs outside of main course of business.

The process starts when Customer requests additional miscellaneous service or the miscellaneous service is provided by Company based on current needs (e.g. tree trimming). An Authorized User creates a billable charge whenever a customer should be levied an ad hoc charge. This charge will be included into the next (one or more) Customer's bills. Refer to sibling process 4.2.2.4 CC&B v2.5 Manage External Charges and Miscellaneous Charges for details.

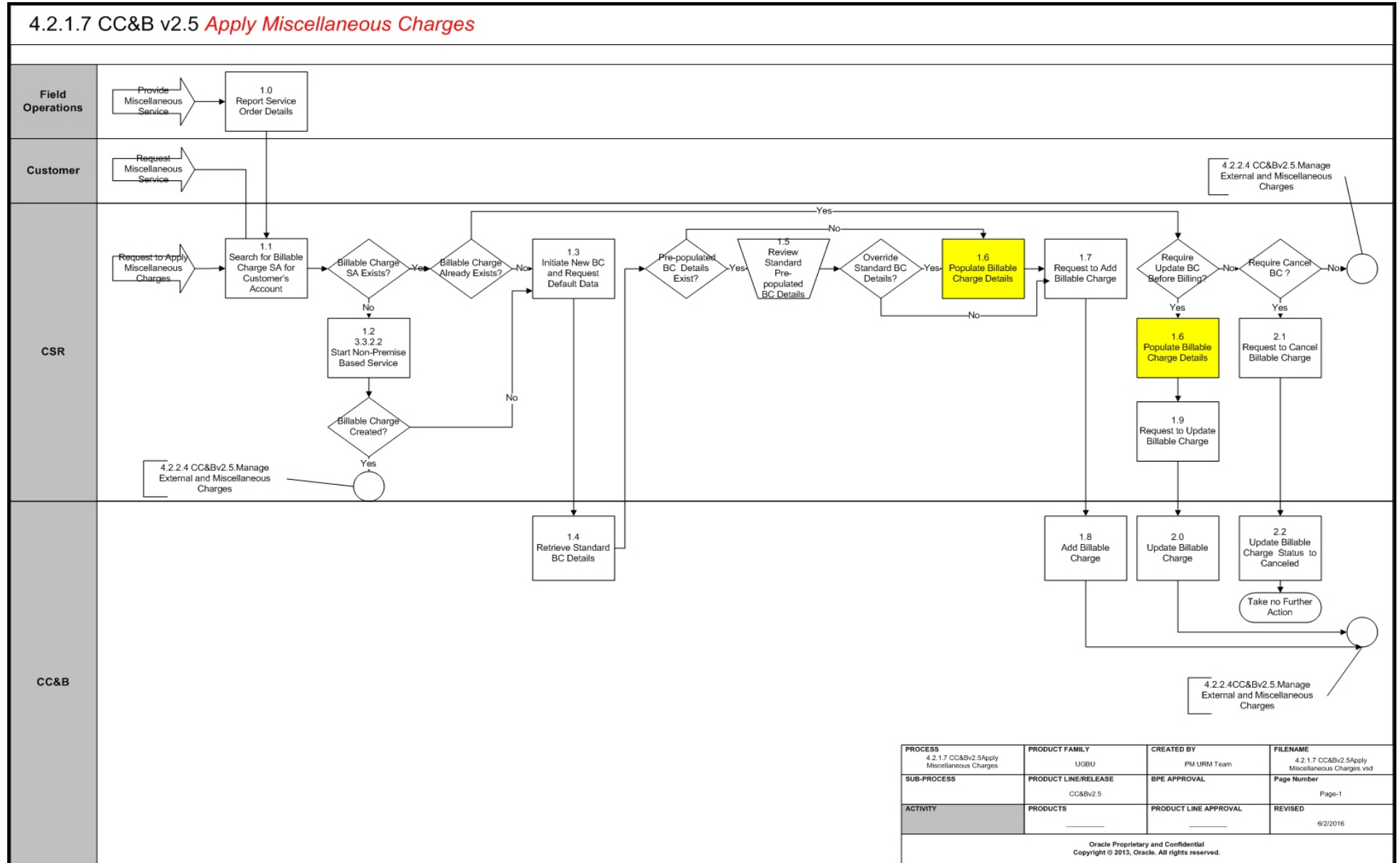
## Actors/Roles

The Apply Miscellaneous Charges business process involves the following actors and roles:

- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **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).
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.

# Business Process Diagrams

## Apply Miscellaneous Charges Process Model - Page 1



## Apply Miscellaneous Charges Detailed Process Model Description

This section provides a detailed description of the “Apply Miscellaneous Charges” business process, including:

- ♦ 1.0 Report Service Order Details
- ♦ 1.1 Search for Billable Charge Service Agreement for Customer's Account
- ♦ 1.2 Refer to 3.3.2.2 CC&Bv2.5 Start Non-Premise Based Service
- ♦ 1.3 Initiate New Billable Charge and Request Default Data
- ♦ 1.4 Retrieve Standard BC Details
- ♦ 1.5 Review Standard Pre-Populate Details
- ♦ 1.6 Populate Billable Charge Details
- ♦ 1.7 Request to Add Billable Charge
- ♦ 1.8 Add Billable Charge
- ♦ 1.9 Request to Update Billable Charge
- ♦ 2.0 Update Billable Charge
- ♦ 2.1 Request to Cancel Billable Charge
- ♦ 2.2 Update Billable Charge Status to Canceled

## 1.0 Report Service Order Details

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** Field Operations

**Description:** After providing additional service to the Customer Field Operations report details of provided Service to CSR in order to charge customer for the service.

## 1.1 Search for Billable Charge Service Agreement for Customer's Account

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** There are few business events that can cause this task to perform. One of them is described in 1.0 Report Service Order Details.

The most typical are:

- Customer contacts Utility Company and requests additional miscellaneous services.
- Company identifies the needs to provide additional services and , as a result, to apply billable charges.

When CSR decides to apply Billable Charges to Customer's Service Agreement after analyzing nature of services, CSR or Authorized User attempts to find available Customer's Billable Charge SA.

## 1.2 Refer to 3.3.2.2 CC&Bv2.5 Start Non-Premise Based Service

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If the customer doesn't have Billable Charge Service Agreement, CSR creates it. Refer to 3.3.2.2 Start Non-Premise Based Service.

**Note:** Some Companies prefer to create Billable Charge automatically when Billable Charge Service Agreement is activated (e.g. One off charges) IT could be done by configuring appropriate SA Type Start Option and providing Billable Charge Template.

### Entities to Configure

- SA Type
- SA Type Start Option
- Billable Charge Template

## 1.3 Initiate New Billable Charge and Request Default Data

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If the customer has a Billable Charge Service Agreement and Billable Charge for the service hasn't been applied yet, CSR or Authorized User initiates Billable charge creation process.



## 1.4 Retrieve Standard BC Details

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CC&B retrieves and populates default Billable Charge details if available.

### Entities to Configure

- SA Type
- Billable Charge Template

## 1.5 Review Standard Pre-Populate Details

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR reviews and evaluates pre-populated default Billable Charge details using Billable Charge page.

## 1.6 Populate Billable Charge Details

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If default data is not available or pre-populated/existing data doesn't satisfy current requirements for Billable Charge, CSR or Authorized User populates correct Billable Charge details using Billable Charge page.

## 1.7 Request to Add Billable Charge

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** CSR or Authorized User requests to add a new Billable Charge.

## 1.8 Add Billable Charge

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CC&B adds a new Billable Charge and link it to Customer's Billable Charge Service Agreement.

### Entities to Configure

- Characteristic Type
- Unit of Measure
- Time of Use
- Service Quantity Identifier
- Distribution Code

## 1.9 Request to Update Billable Charge

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If CSR or Authorized User identifies the needs to update existing Billable Charge, CSR or Authorized User populates the changes (refer to step [1.6 Populate Billable Charge Details](#) for details) and requests update the data.

## 2.0 Update Billable Charge

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CC&B updates Billable charge data.

## 2.1 Request to Cancel Billable Charge

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CSR

**Description:** If CSR or Authorized User decides to cancel existing Billable Charge, CSR or Authorized User changes specific Billable Charge status to Canceled.

**Note:** Cancelled Billable charges will not be used in billing.

## 2.2 Update Billable Charge Status to Canceled

**Reference:** [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

**Actor/Role:** CC&B

**Description:** CC&B updates Billable Charge status to Canceled.

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## Related Training

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

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