

C2M.CCB v2.6

3.4.4.1b Enroll in Non-Billed Budget

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Brief Description

Business Process:	3.4.4.1b C2M.CCB.Enroll in Non-Billed Budget
Process Type:	Sub Process
Parent Process:	3.4.2 C2M.CCB.Develop Insight and Understanding
Sibling Processes:	4.3.1.1 C2M.CCB.Processing Payments, 4.3.3.1b C2M.CCB.Process Monitored Non-Billed Budget Payments, 43.3.1c C2M.CCB.Process Unmonitored Non-Billed Budget Payments, 4.2.2.10b C2M.CCB.Manage Monitored and Unmonitored Non-Billed Budget Billing, 3.4.1.1 C2M.CCB.Manage Contacts, 3.3.2.2. C2M.CCB.Start Non-Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non-Premise Based Service, and 3.4.4.1a C2M.CCB.Enroll in Budget

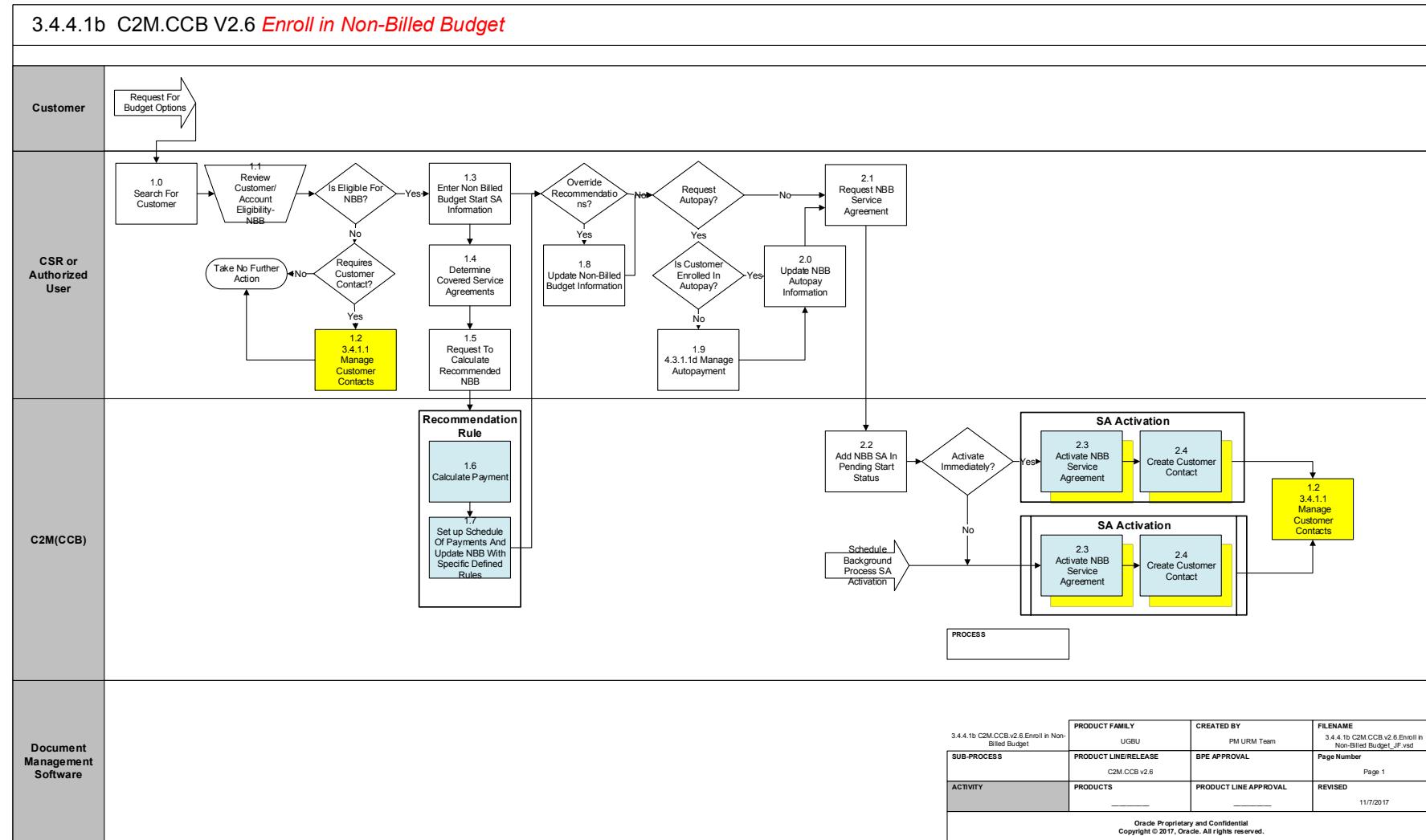
This process describes the [Non-Billed Budget](#) (NBB). It is a payment plan that allows customers to pay set amounts at specified intervals. Non-Billed budgets may be used when billing is infrequent and provides customers with a mechanism to make smaller payments more frequently. Bills are not created for the Non-Billed Budget's scheduled payment. Customers may have a payment coupon book, however must remember to make payments at the scheduled intervals.

A Non-Billed Budget is a special type of budget or payment plan that encompasses three major elements:

- A set of scheduled payments
- The business rules used to recommend and potentially renew the payment schedule
- The business rules that govern the financial impact on the current and payoff balances of the SAs covered by the payment schedule

The process is triggered when the customer contacts the organization requesting Budget plan options. Based on established business rules, the CSR or Authorized User then decides to create a Non-Billed Budget for the customer.

Business Process Model



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

Upon receipt of request or inquiry for [Non Billed Budget](#) Billing the CSR or Authorized User accesses [Control Central Search](#) to locate the customer in C2M(CCB).

1.1 Review Customer/Account Eligibility NBB

Actor/Role: CSR or Authorized User

Description:

Following dialogue with the customer the CSR or Authorized User evaluates the account. This may involve review of Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History. Control Central Alerts assist the CSR or Authorized User in determining eligibility for Non Billed Budget options based on established business rules.

Process Plug-in enabled Y

Available Algorithm(s):

[Installation Options – Control Central Alerts](#)

1.2 3.4.1.1 Manage Customer Contacts

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User enters necessary information about the [Non Billed Budget](#) Plan for the Customer. Refer to 3.4.1.1 Manage Customer Contacts.

Configuration required Y

Entities to Configure:

Letter Template and Template
Customer Contact Class
Customer Contact Type
Customer Contact Characteristics

1.3 Enter Non-Billed Budget Start SA Information**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User selects a CIS Division, the Non Billed Budget SA Type, and enters a date, if different than the default date. The SA Type defines whether this is a monitored or unmonitored Budget. The CSR or Authorized User selects the Recommendation Rule to populate the parameters for the [Non Billed Budget](#). The CSR or Authorized User may override the start date, and parameters of the Non Billed Budget.

Configuration required Y**Entities to Configure:**

CIS Division
SA Type
NBB Recommendation Rule

1.4 Determine Covered Service Agreements**Actor/Role:** CSR or Authorized User**Description:**

All SA's configured as eligible for Non Billed Budget will be listed. The CSR or Authorized User confirms the Service Agreements to be considered for Non Billed Budget.

1.5 Request to Calculate Recommended NBB**Actor/Role:** C2M(CCB)**Description:**

C2M (CCB) calculates the recommended [Non Billed Budget](#) Amount(s) for eligible SA's based on the configured [Recommendation Rule](#). The Recommendation Rule includes rounding rules, day of month for payment, number of payments and true up rules. The average daily amount algorithm NBDA-DA, and the payment schedule algorithm NBPS-MON or NBPS-PS are defined.

Process Plug-in enabled Y**Available Algorithm(s):**

Recommendation Rule Algorithms - Non Billed Budget Recommendation Rule – Average Daily Amount-NBDA-DA; and Payment Schedule – NBPS-MON or NBPS-PS to define monthly or Pay Periods in Days.

Configuration required Y**Entities to Configure:**

Non Billed Budget Recommendation Rule
SA Type

1.6 Calculate Payments Group: Recommendation Rule**Actor/Role:** C2M(CCB)**Description:**

The [Recommendation Rule](#) establishes the amount to be paid and payment due dates. The algorithm type supplied with the base package only handles service-point related SA's. The Recommendation Rule has parameters to define a rounding rule, rounding unit, day of month, number of payments, and true up rule for outstanding balances. A NBB [Adjustment](#) may be created to show transferred amounts.

Configuration required Y	Entities to Configure:
	Non Billed Budget Recommendation Rule SA Type Adjustment Type (for NBB)

Process Plug-in enabled Y	Available Algorithm(s):
	NBDA-DA Algorithm type - use Use Premise History NBB Recommendation Rule - Average Daily Amount with the following algorithms: NBDA-DA-10 NBB Daily Amount Calculation with 10 Percent Adjustment NBDA-DA - NBB Daily Amount Calculation with Zero Adjustment NBBA3090 - NBB Avg Daily \$ Amount + 30% - 90 Day History
	NBPS-MON Algorithm type: Generates a recommended Rule for monthly payment schedule for a non-billed budget
	NBPS-PS Algorithm Type: generates a recommended Rule payment schedule for a non-billed budget SA where the interval between payments is in a specified number of days.

Configuration required Y	Entities to Configure:
	Non Billed Budget Recommendation Rule SA Type Adjustment Type for NBB

1.7 Set up Schedule of Payments and Update Non-Billed Budget with Specific Defined Rules Group: Recommendation Rule**Actor/Role:** C2M(CCB)**Description:**

The payment schedule is established in C2M(CCB) based on the parameters of the [Recommendation Rule](#) as described in the previous step.

Configuration required Y	Entities to Configure:	<table border="1"> <tr> <td>SA Type</td></tr> <tr> <td>Adjustment Type for NBB</td></tr> </table>	SA Type	Adjustment Type for NBB
SA Type				
Adjustment Type for NBB				
Process Plug-in enabled Y	Available Algorithm(s):	<table border="1"> <tr> <td>NBPA-PS Algorithm type – create an adjustment to a non-billed budget SA to reflect the value of the scheduled payment. with the following algorithm: NBPA-PS</td></tr> </table>	NBPA-PS Algorithm type – create an adjustment to a non-billed budget SA to reflect the value of the scheduled payment. with the following algorithm: NBPA-PS	
NBPA-PS Algorithm type – create an adjustment to a non-billed budget SA to reflect the value of the scheduled payment. with the following algorithm: NBPA-PS				
Business Object Y	Business Object:	<table border="1"> <tr> <td>C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule</td></tr> </table>	C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule	
C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule				

1.8 Update Non-Billed Budget Information.**Actor/Role:** CSR or Authorized User**Description:**

Based on established Business Rules, the CSR or Authorized User may change the payment schedule amounts or number of payments. The payment schedule may require updating based on a change to the start date or an expected up front payment from the customer. The expiration date or renewal date may also be changed.

1.9 4.3.1.1d Manage Autopayment**Actor/Role:** CSR**Description:**

Based on established business rules, the CSR or Authorized User will gather [Autopay](#) information from the customer and enter this information at the Account level.

2.0 Update Non-Billed Budget Autopay Information**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User chooses the option to allow Autopay for the [Non-Billed Budget](#).

[2.1 Request Non-Billed Budget Service Agreement](#)

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews the NBB entered information and saves this information.

[2.2 Add Non-Billed Budget SA in Pending Start Status](#)

Actor/Role: C2M(CCB)

Description:

The Non-Billed Budget Service Agreement is added in a Pending Start status. The SA Activation Background Process will activate the Service Agreement the next time it is executed, unless the SA Type is configured to activate immediately. Depending on SA Type started the [Non Billed Budget](#) may be monitored by the Credit and Collection processes in C2M(CCB).

Process Plug-in enabled Y	Available Algorithm(s):	SACR-AT - automatically activate service agreements NEW SA TODO - creates a To Do entry when a Service Agreement is created
Customizable process N	Process Name	SAACT - SA Activation Background Process activates Pending Start Service Agreements when all information is available.
Configuration required Y	Entities to Configure:	SA Type

[2.3 Activate Non-Billed Budget Service Agreement Group: SA Activation](#)

Actor/Role: C2M(CCB)

Description:

If the algorithm SACR-AT is defined for the SA Type, the Service Agreement will be activated immediately. Depending on SA Type started the [Non Billed Budget](#) will be monitored or unmonitored by Credit and Collection processes in C2M(CCB).

Manual Process: The CSR or Authorized User may activate a Service Agreement manually.

Automated Process: The SA Activation Background Process activates Pending Start Service Agreements.

SACR-AT - automatically activate service agreements NEW SA TO DO- creates a To Do entry when a

Process Plug-in enabled Y Available Algorithm(s): Service Agreement is created

Customizable process N Process Name: SAACT – SA Activation Background Process
activates pending start service agreements when all information is available.

Configuration required Y Entities to Configure: SA Type

2.4 Create Customer Contact Group: SA Activation

Actor/Role: C2M(CCB)

Description:

If configured, a Customer Contact can be automatically added when the Service Agreement is activated. If configured, the Customer Contact will be created whether the Service Agreement is activated online or in batch.

Process Plug-in enabled Y Available Algorithm(s): SAAT-CC (SAAT-NB) to automatically add a customer contact when service agreement activated.

Configuration required Y Entities to Configure: Customer Contact Class
Contact Type
Customer Contact Characteristics
SA Type

2.6 Create Letter Extract

Actor/Role: C2M(CCB)

Description:

The letter information is extracted in C2M(CCB) and sent to assigned software used to print the letter. There are various algorithms associated with different letter templates.

Process Plug-in enabled Y **Available Algorithm(s):**

Various algorithms - two algorithm types included in base package are LTEXGEN - Generic Letter Extract, C1-LTREX-RPT - Create letter using reporting engine

Customizable process N

Process Name:

LTRPRT - Letter Extract - The customer contact letter download process creates the flat file(s) that are interfaced to your letter print software to print letters associated with letter-oriented customer contacts. This process extracts all customer contact records associated with its batch control ID that are marked with a supplied run number. If a run number is not supplied, the process uses all customer contact records associated with its batch control ID that are marked with the current run number.

Configuration required Y

Entities to Configure:

Letter Template includes identification of the Batch Control and Letter Extract Algorithms

[2.7 Print Letter](#)

Actor/Role: Document Management Software

Description:

The Letter is generated and printed for the Customer.

[2.8 Send Letter](#)

Actor/Role: Document Management Software

Description:

The Letter is sent to the Customer. This letter can be distributed and/or delivered to the customer different ways such as e-mail, or available to the customer online, etc.

2.9 Receives Letter

Actor/Role: Customer

Description:

The Customer receives the letter.

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
5/18/09	Colleen King		Multiple Changes in April – and updated now for new guidelines
8/27/09	Colleen King		After June review Galina and Nick and based on updated guidelines
10/21/10	Geir Hedman		Updated Title and Content page
10/13/10	Galina Polonsky	V1	Reviewed, Approved
12/3/01	Ze'ev Lavee		Technical Updates for Algorithms
2/8/11	Geir Hedman		Updated Document and Visio
9/3/2013	Don Lee		Updated Document
09/12/13	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated doc and visio to v2.6
09-19-2017	James Foreman		Updated algorithms
09/29/2017	Galina Polonsky		Reviewed, Approved

Attachments:

Account/Non-Billed Budget



Non Billed
Budget.doc

Non-Billed Budget Recommendation Rule



"NBB
Recommendation Ru

Control Central Search



"Control Central
Search.doc"

Non Billed Budget Adjustment



Non Billed Budget
Adjustment.doc

Admin Menu/Installation Options



"Installation Options
Control Central Alert