C2M.v2.7.CCB

3.3.2.1 Start Premise Based Service

Creation Date: March 12, 2009

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Contents

Brief Description

Business Process: **3.3.2.1 C2M.CCB.Start Premise Based Service**

Process Type: **Sub-Process**
Parent Process: **3.3.2 C2M.CCB.Manage Service Agreement**
Sibling Processes: **3.3.2.3 C2M.CCB.Stop Premise Based Service, 3.3.2.2 C2M.CCB.Start Non-Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non Premise Based Service, 3.3.3.2 C2M.CCB.Determine Customer Deposit, 3.3.1.1 C2M.CCB.Establish Person and/or Account, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 5.3.2.1 C2M.CCB.Manage Field Activities and Field Orders, 3.4.4.1a C2M.CCB Enroll in Budget, 3.4.4.1b C2M.CCB Enroll in Non-Billed Budget, 4.3.2.1 C2M.CCB.Manage Collection Process, 5.1.5.1 C2M.CCB.Manage Metered Site**

This process describes the typical Start Service processing for service related to Service Points. After receiving a Customer request to Start Service, a new Customer is created or an existing Customer's details confirmed, a Service Agreement(s) and associated Usage Subscription are created to record the relationship with the Customer.

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3.3.2.1 C2M.CCB v2.6 *Start Premise Based Service*

Customer

- Request New Service

CSR or Authorized User

- 1.0 Confirm Request Applicable
- New Premise or Update Existing Premise? — No
- Yes
- 1.1 5.1.5.1 C2M.CCB.Manage Metered Site
- 1.2 Search For Customer
- 1.3 3.3.1.1. C2M.CCB. Establish Person And/Or Account
- Pending Start Exists? — No
- Yes
- 1.4 Analyze Pending Start
- Update? — Yes — 1.5 Request Update Information
- No
- Take No Further Action
- Gap of Service and Landlord Agreement Exists? — No
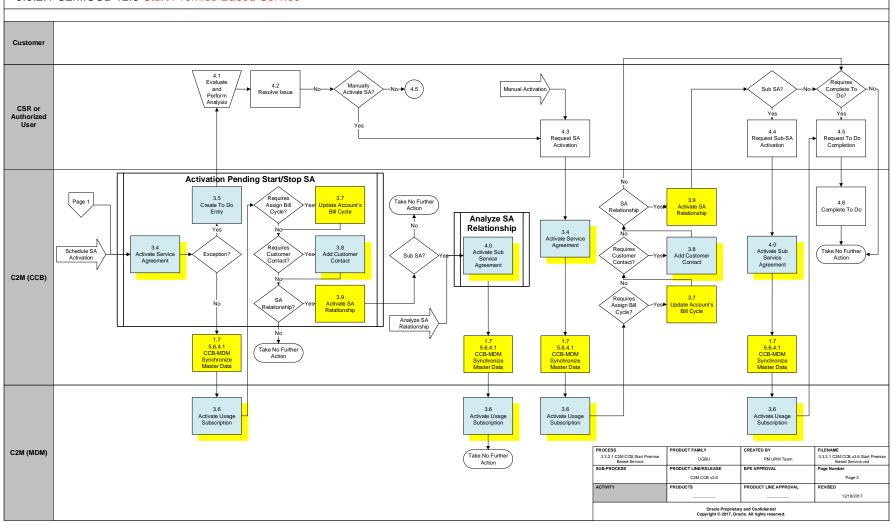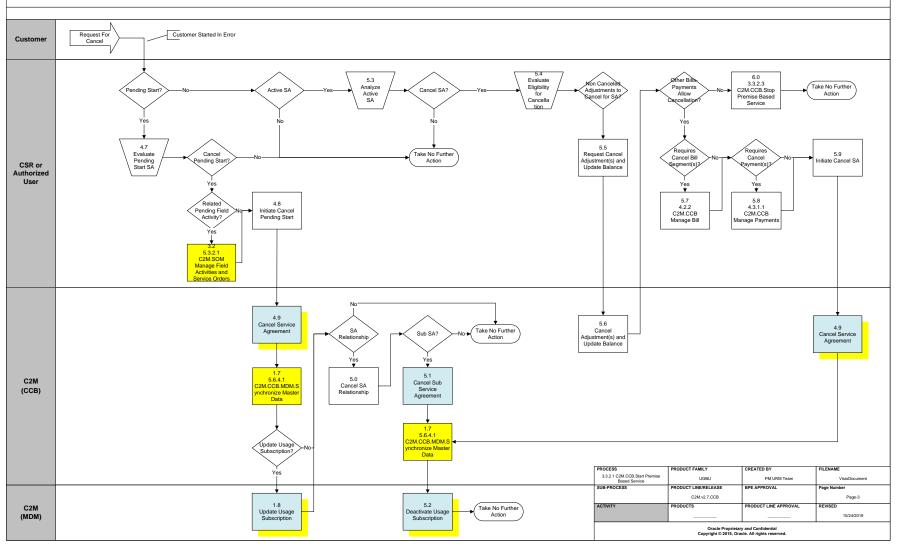- Yes
- 1.9 3.3.6.2 C2M.CCB.Start Premise Based Service for Landlord-Tenant
- Take No Further Action
- 2.0 Evaluate Account
- Request External Credit Check? — No
- Yes
- 2.1 Request Credit Review From External Credit Bureau
- 2.3 Receive Results From External Credit Bureau
- 2.4 Evaluate External Credit Bureau Results
- 2.5 3.3.3.2 C2M.CCB. Determine Customer Deposit
- Active SA's For Premise Exist? — No
- Yes
- 2.6 3.3.2.3 C2M.CCB. Stop Premise Based Service
- 2.7 Populate Start Service Information And Contact Details
- 3.3 3.3.2.2 C2M.CCB. Start Non Premise Based Service
- Yes
- Start Non Premise Based Services? — No

External Credit Bureau

- 2.2 Provide External Credit Score Information

C2M (CCB)

- 1.6 Update Information
- 1.7 5.6.4.1 CCB-MDM Synchronize Master Data
- Update Usage Subscription? — No
- Yes
- 2.8 Record Future Contact Details
- **Create SA**
  - 2.9 Add Pending Start SA and Link SA to SP
  - SA Relationship Required? — No
  - Yes
  - 3.1 Create SA Relationship and Sub SA
  - 3.2 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders
- 1.7 5.6.4.1 CCB-MDM Synchronize Master Data
- 1.7 5.6.4.1 CCB-MDM Synchronize Master Data
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C2M (MDM)

- 1.8 Update Usage Subscription
- 3.0 Create Usage Subscription in an Inactive Status
- 3.0 Create Usage Subscription in an Inactive Status

PROCESS 3.3.2.1 C2M.CCB.Start Premise Based Service	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.2.1 C2M.CCB.v2.6.Start Premise Based Service.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE C2M.CCB v2.6	BPE APPROVAL	Page Number Page 1
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 12/18/2017

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3.3.2.1 C2M.CCB v2.6 *Start Premise Based Service*

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.3.2.1 C2M.CCB.Start Premise Based Service	UGBU	PM URM Team	3.3.2.1 C2M.CCB.v2.6.Start Premise Based Service.vsd
SUB-PROCESS	**PRODUCT LINE/RELEASE**	**BPE APPROVAL**	**Page Number**
	C2M.CCB v2.6		Page-2
ACTIVITY	**PRODUCTS**	**PRODUCT LINE APPROVAL**	**REVISED**
	———	———	12/18/2017

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3.3.2.1 C2M.v2.7.CCB *Start Premise Based Service*

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.3.2.1 C2M.CCB.Start Premise Based Service	UGBU	PM URM Team	VisioDocument
SUB-PROCESS	**PRODUCT LINE/RELEASE**	**BPE APPROVAL**	**Page Number**
	C2M.v2.7.CCB		Page-3
ACTIVITY	**PRODUCTS**	**PRODUCT LINE APPROVAL**	**REVISED**
	_____	_____	10/24/2019

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Detail Business Process Model Description

1.0 Confirm Request Applicable
Actor/Role: CSR or Authorized User
Description:
Upon receipt of a request for Start Service, the CSR or Authorized User confirms the requested service and the location for which the service is required. If necessary the location is checked by searching for the premise address in C2M (CCB) using Control Central Search. If the utility does not provide service at the location, the CSR or Authorized User refers the caller to appropriate agency and the process stops with no further action.

1.1 5.1.5.1 C2M.CCB.Manage Metered Site
Actor/Role: CSR or Authorized User
Description:
If a new Premise or Service Point(s) needs to be created, refer to 5.1.5.1 C2M.CCB.Manage Metered Site.

1.2 Search for Customer
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User locates the customer in C2M (CCB) using Control Central Search. When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central – Account Information that displays information about the selected customer's data. Dashboard Alerts provide the CSR or Authorized User with relevant information about the customer, including an alert if there are any Pending Starts.

Process Plug-in enabled Y	**Available Algorithm(s):**	C1-PEND-STRT - Highlight Pending Start Service Agreements

1.3 3.3.1.1 C2M.CCB.Establish Person and/or Account Process
Actor/Role: CSR or Authorized User
Description:
Refer to process 3.3.1.1 C2M.CCB.Establish Person and/or Account Process.

1.4 Analyze Pending Start
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the existing Pending Start to determine if any updates are required.

1.5 Request Update Information

Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User enters changes for the Account and/or Service Agreement information.

1.6 Update Information
Actor/Role: C2M (CCB)
Description:
C2M (CCB) updates the Account and/or pending Start Service Agreement(s).

1.7 5.6.4.1 CCB-MDM Synchronize Master Data
Actor/Role: C2M (CCB) and C2M (MDM)
Description:
Changes to a service agreement may impact a related usage subscription.   Refer to 5.6.4.1 CCB-MDM Synchronize Master Data for details.

1.8 Update Usage Subscription
Actor/Role: C2M (MDM)
Description:
The related Usage Subscription is updated in C2M (MDM).   Note: The Service Agreement in Pending Start status is considered "Inactive" in C2M (MDM).

1.9 3.3.6.2 C2M.CCB Start Premise Based Service for Landlord-Tenant
Actor/Role: CSR or Authorized User
Description:
Refer to 3.3.6.2 C2M.CCB Start Premise Based Service for Landlord-Tenant.

2.0 Evaluate Account
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User evaluates the account. Typically Account Financial History, Billing History, and Account Credit and Collection History are reviewed.

2.1 Request Credit Review from External Credit Bureau
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User determines further information is needed and performs an external credit check. This is a custom process.

2.2 Provide External Credit Score Information
Actor/Role: External Credit Bureau
Description:
The External Credit Bureau collects and provides the required external credit score information.

2.3 Receive Results from External Credit Bureau
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User receives the credit information from the External Credit Bureau. This is a custom process.

2.4 Evaluate Results from External Credit Bureau
Actor/Role: CSR or Authorized User
Description:
Based on established business rules the CSR or Authorized User reviews the credit information to determine the overall credit risk.

2.5 3.3.3.2 C2M.CCB.Determine Customer Deposit
Actor/Role: CSR or Authorized User
Description:
A Customer Deposit may be required. Refer to 3.3.3.2 C2M.CCB.Determine Customer Deposit.

2.6 3.3.2.3 C2M.CCB.Stop Premise Based Service
Actor/Role: CSR or Authorized User
Description:
If there are Active Service Agreements that should be stopped, refer to 3.3.2.3 C2M.CCB.Stop Premise Based Service.

2.7 Populate Start Service Information And Contact Details
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User gathers the information required to initiate the Start Service process. The CSR or Authorized User enters the desired start date and selects the Premise or Service Points to start. The CSR or Authorized User determines the SA Type and optionally the Start Option, SIC and Budget information. Note Start Options may include Connection fees, Characteristics, Contract riders, Contract Terms and Rate information. The Service Agreement Type can default based on Service Point Type. If required the CSR or Authorized enters the bill routing and contact information.
Note: If the service being started relates to Net Metering additional information maybe required.

Configuration required Y   **Entities to Configure:**

CIS Division
Service Type
SA Type
SA Type Start Options
SP Type
Rate Schedule
Contract Quantity Type
Contract Options Type
Contract Option Event Type

2.8 Record Future Contact Details
Actor/Role: C2M (CCB)
Description:
The bill routing and contact information is recorded with the pending start details. When the Service Agreement is activated, the Person and Account are updated.

2.9 Add Pending Start SA and Link SA to SP Group: Create SA
Actor/Role: C2M (CCB)
Description:
C2M(CCB) creates a Service Agreement in Pending Start status and links the Service Agreement to the Service Point(s).

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

SACR-AT - This SA creation algorithm activates a pending start SA.
NEW SA TODO - This SA creation algorithm creates a To Do entry when a SA is added.
C1-CREATEPPB – This SA creation algorithm creates a prepay biller.

Configuration required Y   **Entities to Configure:**

To Do Type
To Do Role
SA Type

3.0 Create Usage Subscription
Actor/Role: C2M (MDM)
Description:
A Usage Subscription is created in C2M (MDM) The Usage Subscription is considered an Inactive Status at this time.

3.1 Create SA Relationship and Sub SA Group: Create SA

Actor/Role: C2M (CCB)
Description:
Create SA Relationships and if required Sub-Service Agreements. A "SA Type – SA Creation" algorithm can trigger the creation of an SA Relationship record. The details in SA Type SA Relationship Type indicate if and how a Sub-Service Agreement(s) should be created. The creation of a Sub-Service Agreement can trigger other actions such as the creation of a True Up Monitor (See 3.3.8.1 C2M.CCB.Establish and Maintain Net Metering Energy Metering Service for details on True Up Monitors).

Process Plug-in enabled Y	**Available Algorithm(s):**	
		C1-SAT-SARL – This algorithm type creates an SA Relationship record as well as the Sub Service Agreement.
		C1-SAT-TUM Creates a True Up Monitor for a Sub Service Agreement

Business Object Y	**Business Object:**	
		C1-NEMTrueUpTask
		C1-NEMTrueUpTaskType

Configuration required Y	**Entities to Configure:**	
		SA Type
		SA Relationship Type
		SA Type SA Relationship Type
		Service Task Type
		Characteristic Type

3.2 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders Group: Create SA

Actor/Role: C2M (CCB)
Description:
A start Field Activity may be created for each Service Point linked to the Service Agreement. A reference to each Field Activity created is recorded in the Service Agreement. The Pending SA/SP Monitor Process will also create Field Activities for Pending Starts and Stops if a Field Activity does not already exist and is required. Service Order Management orchestrates any field work or smart commands necessary to start service. Refer to 5.3.2.1 C2M.SOM.Manage Field Activities and Service Orders for details.

3.3 3.3.2.2 C2M.CCB. Start Non-Premise Based Service
Actor/Role: C2M (CCB)
Description:
Refer to 3.3.2.2 C2M.CCB.Start Non-Premise Based Service.

3.4 Activate Service Agreement Group: Activation Pending Start/Stop SA
Actor/Role: C2M (CCB)
Description:
The Service Agreement status is transitioned to active in C2M (CCB). This can occur because a CSR or Authorized User has manually transitioned the Service Agreement to Active or C2M (CCB) can automatically transition the Service Agreement to Active status when all of the required information is available.

Customizable process N	**Process Name:**	SAACT - Activates pending start and stops pending stop Service Agreements when all required information is available.

3.5 Create To Do Entry Group: Activation Pending Start/Stop SA
Actor/Role: C2M (CCB)
Description:
If an exception occurs in the SAACT background process and if configured, a To Do Entry is created.

Process Plug-in enabled Y	**Available Algorithm(s):**	
		C1-ADJAREQEM - Create Email For Adjustment Approval
		C1-CAPREMAIL - This algorithm type creates an email outbound message requesting the user to respond to an approval request for the rebate claim linked to the To Do being processed.
		C1-CREMAILTD - This algorithm creates an outbound message that sends email related to the To Do Entry being processed.
		F1-TDT-INFO - This algorithm formats the "To Do Information" that appears throughout the system. It concatenates the to do fields and delimiters specified as algorithm parameters
		C1-VALTDROLE - This algorithm prevents the To Do Role from being changed. This algorithm would

typically be used on To Do Types that are used for Adjustment Approval. This ensures that the corresponding Approval Roles are preserved.
F1-VAL-SKILL - This algorithm validates user assignment changes with respect to minimum required skills defined for the To Do and the currently assigned user. Skill validation is performed when a To Do is assigned for the first time to a specific user or when the To Do is reassigned to another user.

Configuration required Y   **Entities to Configure:**

To Do Types
To Do Roles

3.6 Activate Usage Subcription
Actor/Role: C2M (MDM)
Description:
The related Usage Subscription is transitioned to Active in C2M (MDM).

3.7 Update Account's Bill Cycle Group: Activation Pending Start/Stop SA
Actor/Role: C2M (CCB)
Description:
If the account's bill cycle is not protected, the bill cycle will be changed to reflect the service point's measurement cycle.

Configuration required Y   **Entities to Configure:**

Bill Cycle
Measurement Cycle

3.8 Add Customer Contact Group: Activation Pending Start/Stop SA
Actor/Role: C2M (CCB)
Description:
A Customer Contact is added in C2M (CCB). If configured, C2M (CCB) can automatically create a Customer Contact when a Service Agreement is activated.   Note C2M (CCB) creates a Dashboard Alert for the Customer Contact information and displays the last contact in the Dashboard Alert, refer to process 3.4.1.1 Manage Customer Contacts.

SAAT-CC – Creates a customer contact of the specified Customer Contact Class and Customer

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Process Plug-in enabled Y	Available Algorithm(s):	Contact Type when the service agreement is activated.

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

3.9 Activate SA Relationship   Group: Activation Pending Start/Stop SA
Actor/Role: C2M (CCB)
Description:
The related SA Relationship records are activated in C2M (CCB).

4.0 Activate Sub-Service Agreement   Group: Analyze SA Relationship
Actor/Role: C2M (CCB)
Description:
The related Sub-Service Agreement is activated in C2M (CCB).

Customizable process N	Process Name:	ANLYZSAR - Activates Sub-Service Agreements for new activated SA Relationships.

4.1 Evaluate and Perform Analysis
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User enters the required information in C2M to resolve the exception. This may include creating a Field Activity, or updating a Service Point. Once the issue is resolved, the CSR or Authorized User completes the To Do Entry.

4.2 Resolve Issue
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User determines what needs to be done and enters applicable information in C2M(CCB) or MDM.

4.3 Request Activate SA

Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User manually activates the [Service Agreement](#) in C2M (CCB).

4.4 Request Sub-SA Activation
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User manually activates the Sub-Service Agreement in C2M (CCB).

4.5 Request To Do Completion
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User manually completes the To Do Entry in C2M (CCB).

4.6 Complete To Do Entry
Actor/Role: C2M (CCB)
Description:
The To Do Entry is updated to Complete status in C2M (CCB).

4.7 Evaluate Pending Service SA
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the pending start Service Agreement. It may be determined that the [Service Agreement](#) needs to be canceled, for example the Customer indicate they are not moving into the Premise.

4.8 Initiate Cancel Pending Start
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels the [Pending Start Service Agreement](#).

4.9 Cancel Service Agreement
Actor/Role: C2M (CCB)
Description:
The Service Agreement is transitioned to the Canceled status.   In this process the Service Agreement transitions to Canceled status from either Pending Start or Active status.

5.0 Cancel SA Relationship
Actor/Role: C2M (CCB)
Description:
The SA Relationship is updated to Canceled status in C2M (CCB).

5.1 Cancel Sub Service Agreement
Actor/Role: C2M (CCB)
Description:
Cancel related Sub Service Agreements. The cancellation of a Service Agreement can trigger other actions such as the cancelation of a True Up Monitor (See 3.3.8.1 C2M.CCB.Establish and Maintain Net Metering Energy Metering Service for details on True Up Monitors).

Process Plug-in enabled Y	**Available Algorithm(s):**	C1-CNC-TUM - This algorithm cancels active true up monitors.

Business Object Y	**Business Object**	C1-NEMTrueUpTask
		C1-NEMTrueUpTaskType

Configuration required Y	**Entities to Configure:**	SA Type
		Service Task Type
		Characteristic Type

5.2 Deactivate Usage Subscription
Actor/Role: C2M (MDM)
Description:
The related Usage Subscription is updated to Inactive status in C2M (MDM).

5.3 Analyze Active SA
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the Active Service Agreement and determines if the Service Agreement should be canceled.

5.4 Evaluate Eligibility for Cancellation
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User determines if any financial transactions are associated with the Service Agreement.

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5.5 Request Cancel Adjustment(s) and Update Balance
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels applicable adjustment(s) to allow cancellation of the Service Agreement. The Service Agreement balance is updated accordingly.

Configuration required Y   **Entities to Configure:** | Adjustment Cancel Reason |

5.6 Cancel Adjustment(s) and Reflect Changes to Balance
Actor/Role: C2M(CCB)
Description:
The Service Agreement balance is updated in C2M(CCB) to reflect the adjustment cancellation.

Configuration required Y   **Entities to Configure:** | Adjustment Cancel Reason |

5.7 4.2.2 C2M.CCB Manage Bill
Actor/Role: CSR or Authorized User
Description:
Refer to 4.2.2.2 C2M.CCB-MDM for Manage Meter Charges or 4.2.3.3 C2M.CCB-MDM Manage Item Charges for cancellation of Bill Segments.

5.8 4.3.1.1 C2M.CCB Manage Payments
Actor/Role: CSR or Authorized User
Description:
Refer to 4.3.1.1 C2M.CCB Manage Payments for cancellation of Payments.

5.9 Initiate Cancel SA
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels the Service Agreement. If there are existing Financial Transactions, they must be canceled prior to canceling the Service Agreement. If the Financial Transactions cannot be canceled, the Service Agreement is stopped.   Refer to 4.1.1.1 C2M.CCB Manage Adjustment and Adjustment Approval, 4.2.2.2 C2M.CCB Manage Meter Charges, and 4.3.1.1 C2M Manage Payments.

Configuration required Y   **Entities to Configure:** | Cancel Reason- for Bill, Payment or Adjustment |

6.0 3.3.2.3 C2M.CCB.Stop Premise Based Service

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User stops the Service Agreement, refer to the process 3.3.2.3 C2M.CCB.Stop Premise Based Service.

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
		Draft 1a	No Previous Document
3/12/09	Colleen King	Multiple	Multiple changes have occurred. All information is now place in this new document using newest template
3/16/09	Colleen King	Multiple	
3/17-3/26/09	Colleen King	Multiple	
5/09/09	Nick Burrell		Reviewed
5/10/09	Galina Polonsky		Reviewed, Approved
5/8/09	Colleen King	Multiple	Changes after reviewers
8/11/09	Colleen King		Changes after further review
8/12/09	Colleen King		Changes after further review
9/30/09	Colleen King		Changes after Manage Fieldwork process
9/29/10	Yoko Iwahiro		Add configuration, algorithms, business objects.
10/20/10	Geir Hedman		Updated Title and Content page
1/27/11	Geir Hedman		Updated document and Visio
3/15/13	May Wang	V2 .1	Updated document and Visio
04/05/2013	Galina Polonsky		Reviewed, Approved
01/10/2041	Caroline Prado	V2.1.1	Updated document and Visio
03/05/2014	Galina Polonsky		Reviewed, Approved
08/24/15	Muhssin Suliman		Update to CCBv2.5
11/16/2015	Galina Polonsky		Reviewed, Approved
08/18/2017	Angus Mackenzie		Updated for C2M and CCB V2.6
10/12/2017	Ekta Dua		Updated document and Visio for formatting changes
10/15/2017	Galina Polonsky		Reviewed, Approved
11/28/2017	Colleen King		Additional updates made with Galina Polonsky approval
12/12/17	Colleen King		Additional updates
12/18/2017	Colleen King		Additional updates
12/21/2017	Galina Polonsky		Reviewed, Approved
05/29/2019	Satya Kalavala		Updated format for v2.7

Attachments:

Start/Stop/Pending Start

"Start Stop - Pending"

Control Central Search

"Control Central Search.doc"

Service Agreement/Pending Start

"SA-Pending St"

Dashboard Alert /Pending Start

"Dashboard Alert for Pending Start.doc"

Admin Menu/Installation Options/Control Central Alerts

Installation Options Framework Control C

Account Financial History

"Account Financial History.doc"

Billing History

"Billing History.doc"

Account / Credit and Collection

"Credit-Collection
History.doc"