



**CCS**

**C2M.v2.7.CCB**

## **3.3.2.1a Start Premise Based Service Using Customer Service Request**

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Last Updated: October 23, 2020

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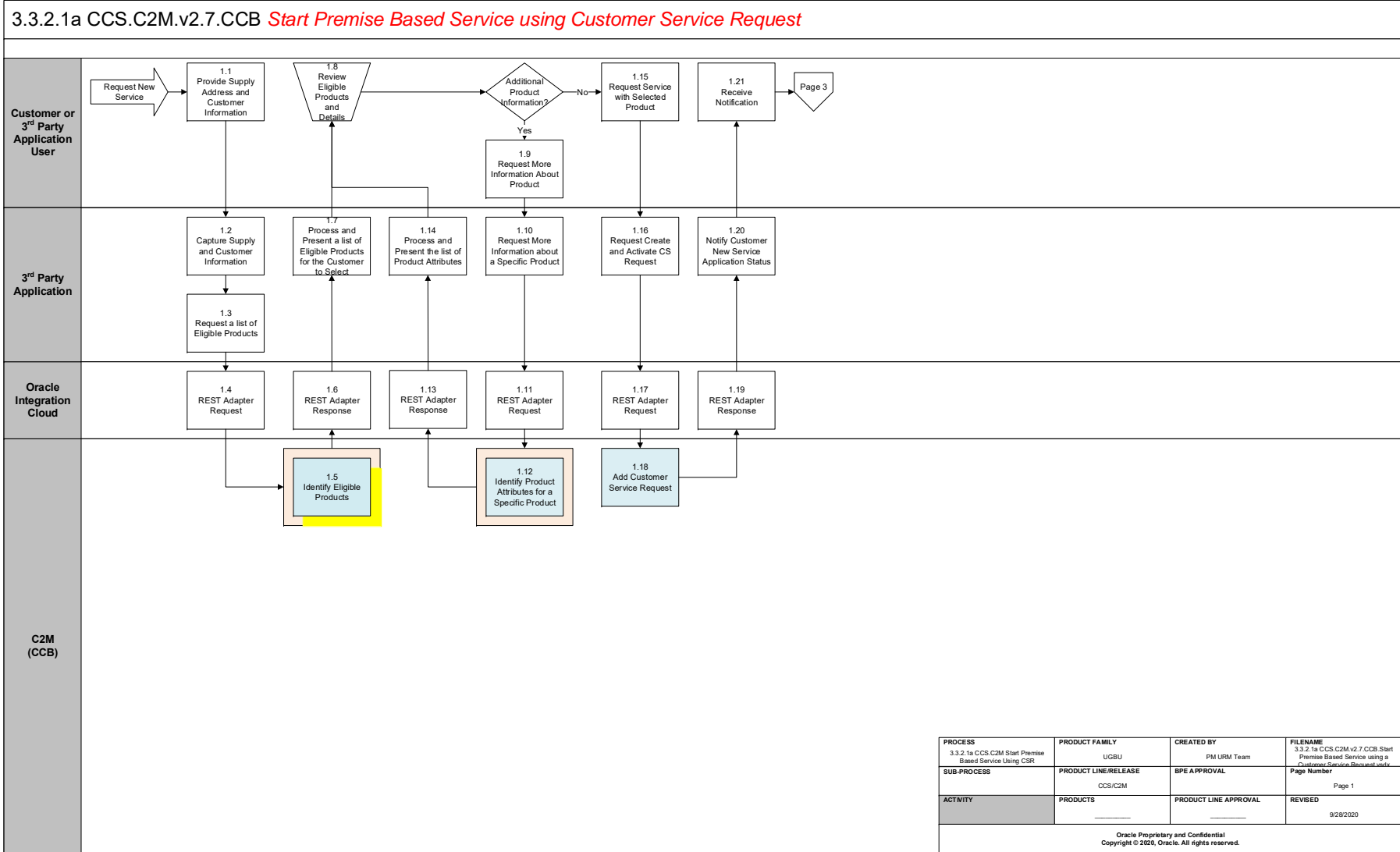
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## Brief Description

**Business Process:** 3.3.2.1a C2M.CCB.Start Premise Based Service using a Customer Service Request (Retailer)  
**Process Type:** Sub-Process  
**Parent Process:** 3.3.2 C2M.CCB-MDM.Manage Service Agreement (Retailer)  
**Sibling Processes:** 3.3.1.1a C2M.CCB.Establish Person and/or Account for Customer Service Request; 3.3.2.5 C2M.CCB.Manage Consumer Contracts; 3.3.3.2 C2M.CCB.Determine Customer Deposits (Cash, Non-cash,3rd Party); 5.1.5.1a C2M.CCB.Manage Metered Site; 5.1.5.2a C2M.CCB.Manage Unmetered Site; 3.4.1.1 C2M.CCB.Manage Customer Contacts

This business process depicts scenarios when customers have contacted the service provider to request service, or make changes to existing service and service request. The Customer Service Request could be initiated manually or received as a request from the third party application. This process describes how the Customer Service Request processes captured information and enables application create, maintain, and remove Consumer Contracts. It also describes creation and/or update of Service Request Person, Service Request Account, Service Request Premise and Service Request Service Location associated with specific Service Request.

# Business Process Model Page 1

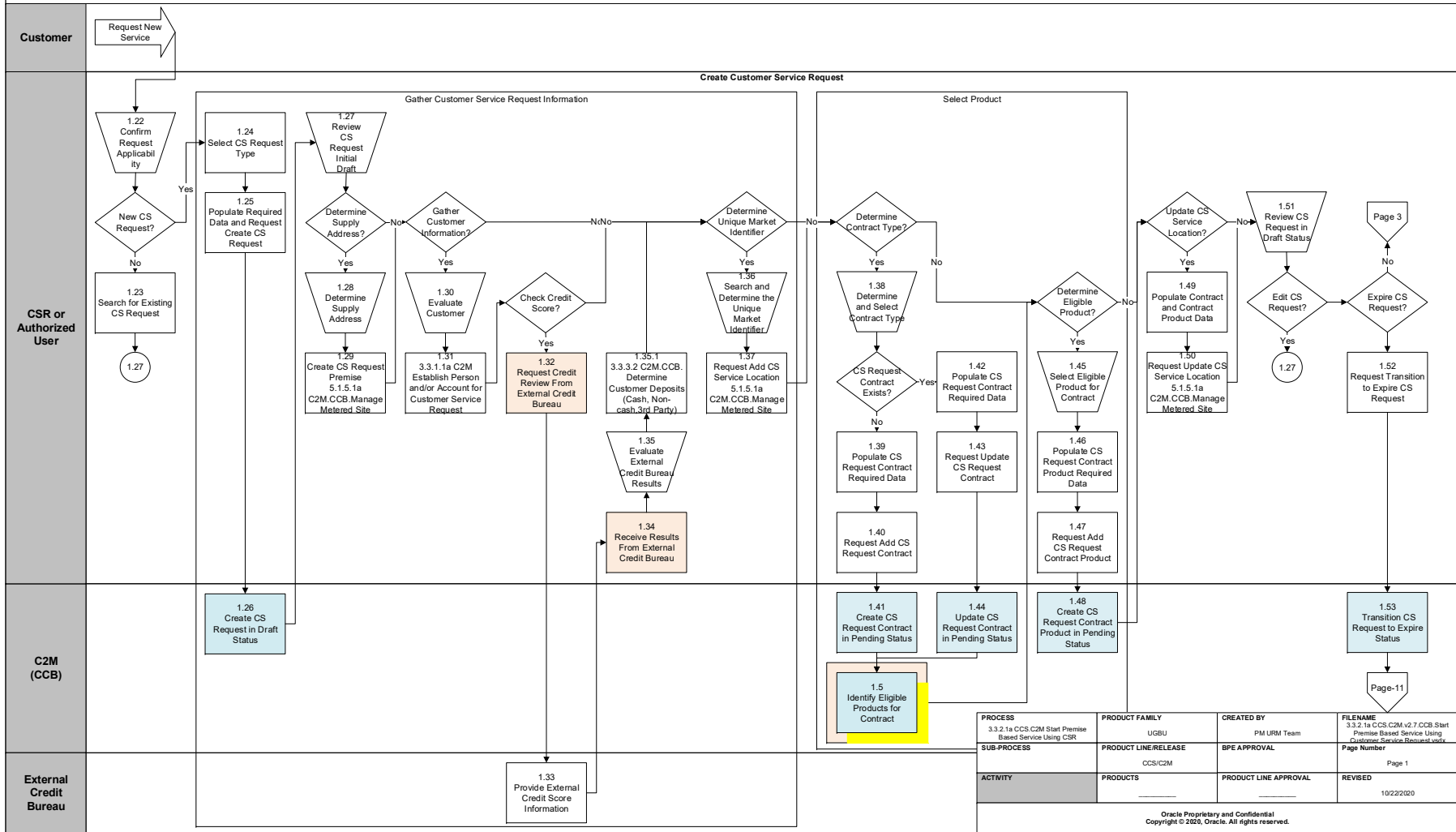


| PROCESS  | PRODUCT FAMILY       | CREATED BY            | FILENAME   |
|--|----------------------|-----------------------|--|
| 3.3.2.1a CCS.C2M Start Premise Based Service using CSR | UGBU                 | PM LRM Team           | 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using a Customer Service Request.pdf |
| SUB-PROCESS  | PRODUCT LINE/RELEASE | BPE APPROVAL          | Page Number  |
|  | CCS/C2M              |                       | Page 1   |
| ACTIVITY   | PRODUCTS             | PRODUCT LINE APPROVAL | REVISED  |
|  |                      |                       | 9/28/2020  |

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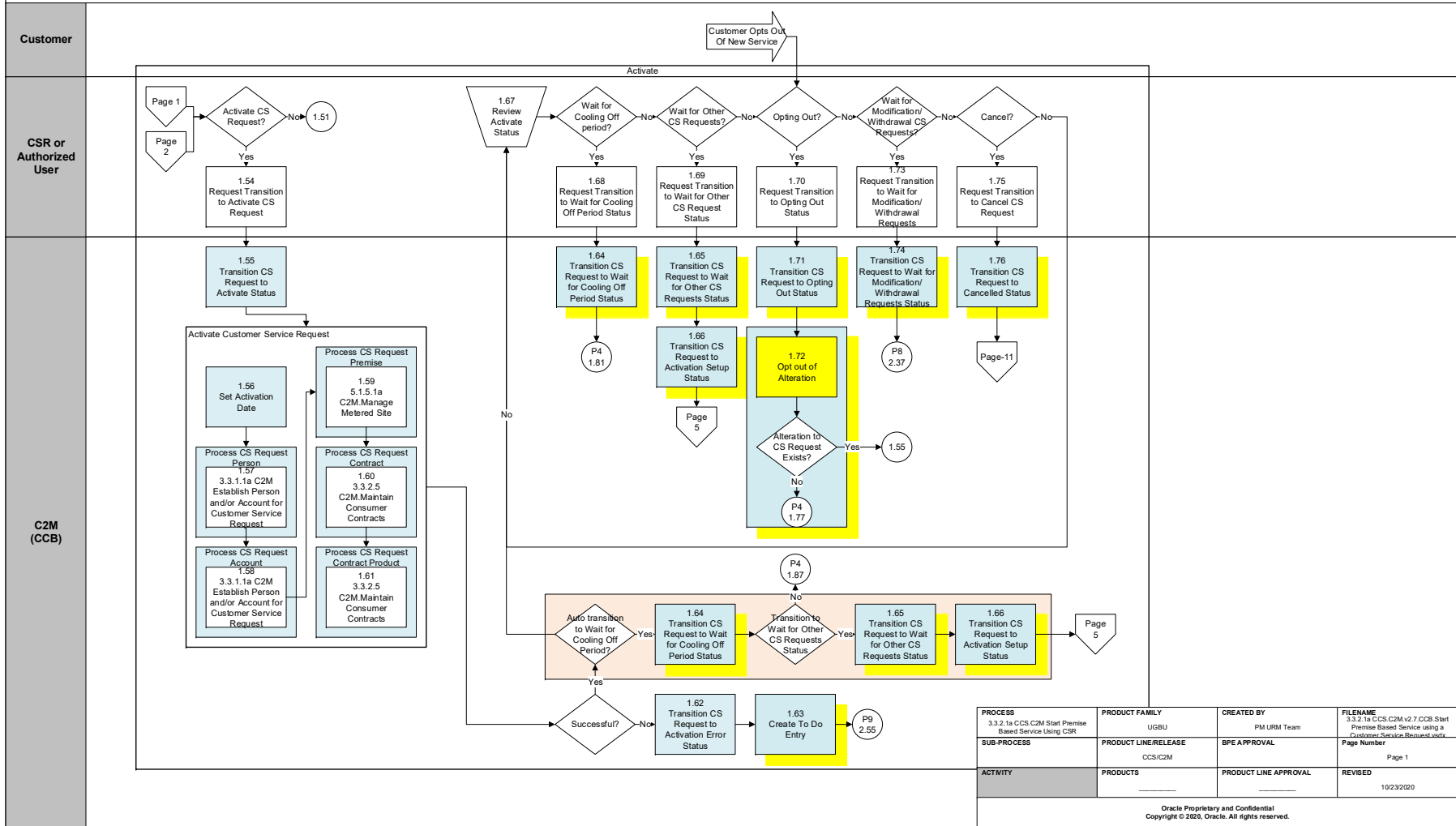
## Business Process Model Page 2

### 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



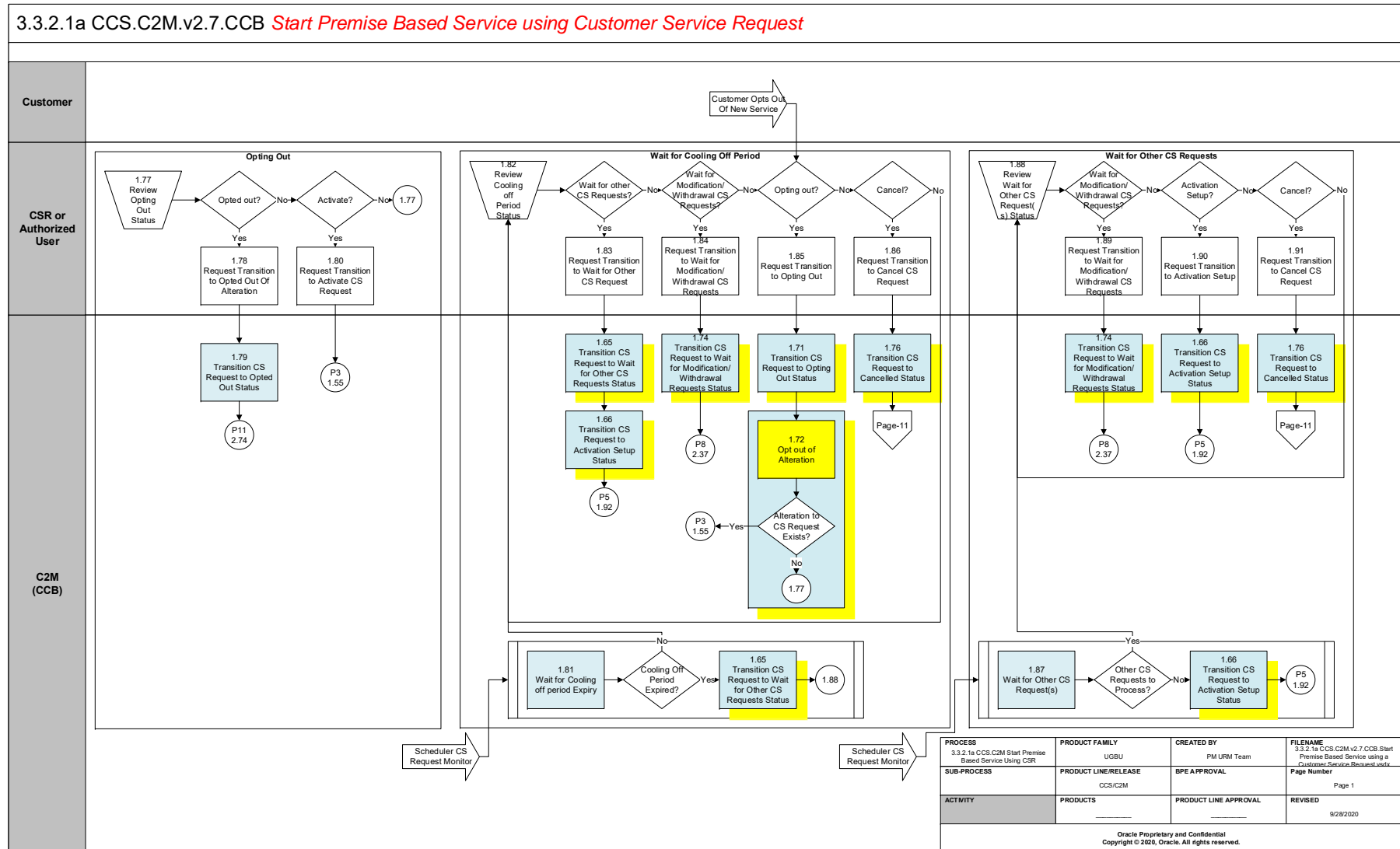
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## 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



## Business Process Model Page 4

### 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



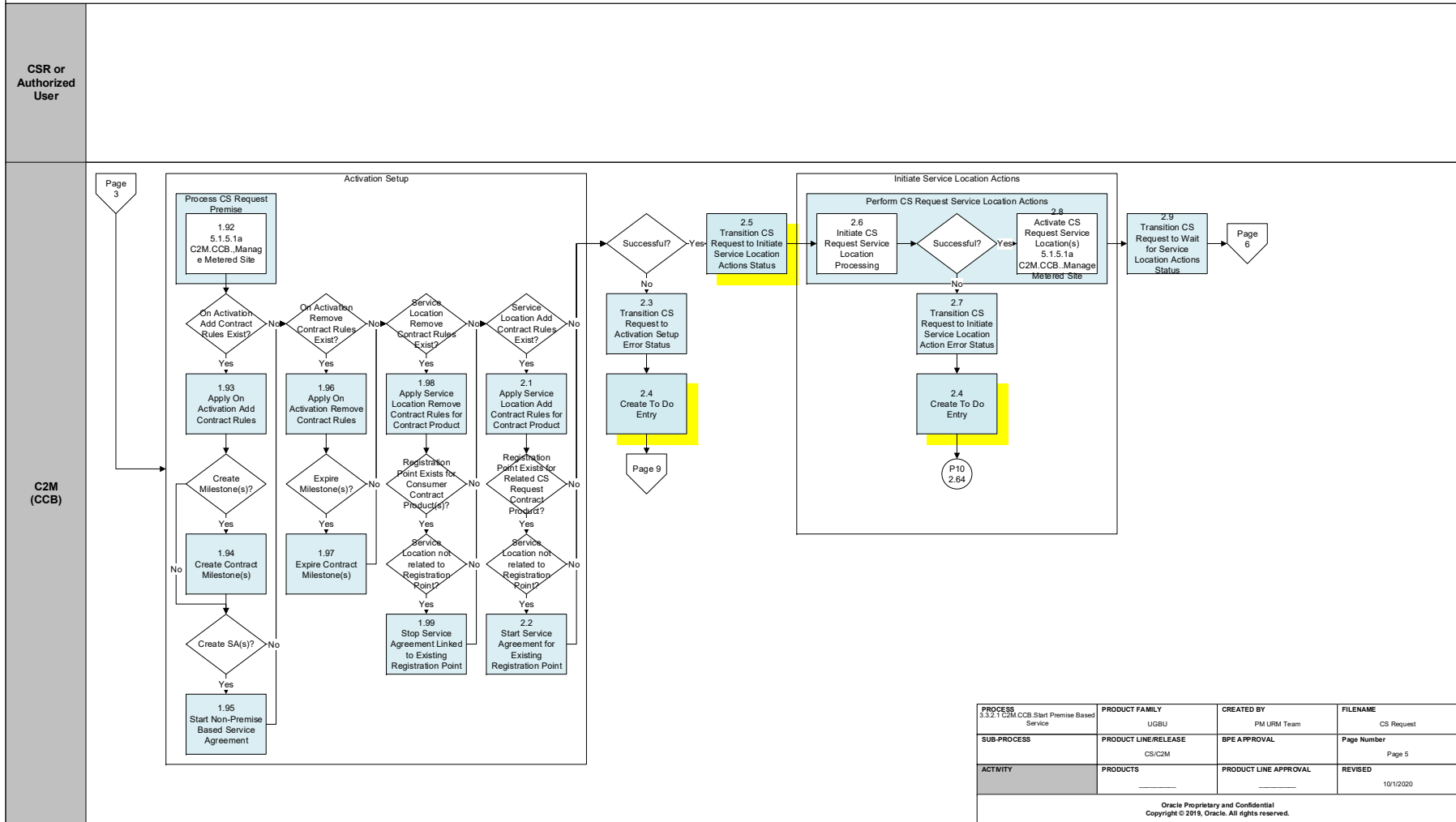
|                    |  |                             |         |                              |             |                    |  |
|--------------------|--|-----------------------------|---------|------------------------------|-------------|--------------------|--|
| <b>PROCESS</b>     | 3.3.2.1a CCS.C2M Start Premise Based Service Using CSR | <b>PRODUCT FAMILY</b>       | UGBU    | <b>CREATED BY</b>            | PM URM Team | <b>FILENAME</b>    | 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using a Customer Service Request.pdf |
| <b>SUB-PROCESS</b> |  | <b>PRODUCT LINE/RELEASE</b> | CCS/C2M | <b>BPE APPROVAL</b>          |             | <b>Page Number</b> | Page 1   |
| <b>ACTIVITY</b>    |  | <b>PRODUCTS</b>             |         | <b>PRODUCT LINE APPROVAL</b> |             | <b>REVISED</b>     | 9/29/2020  |

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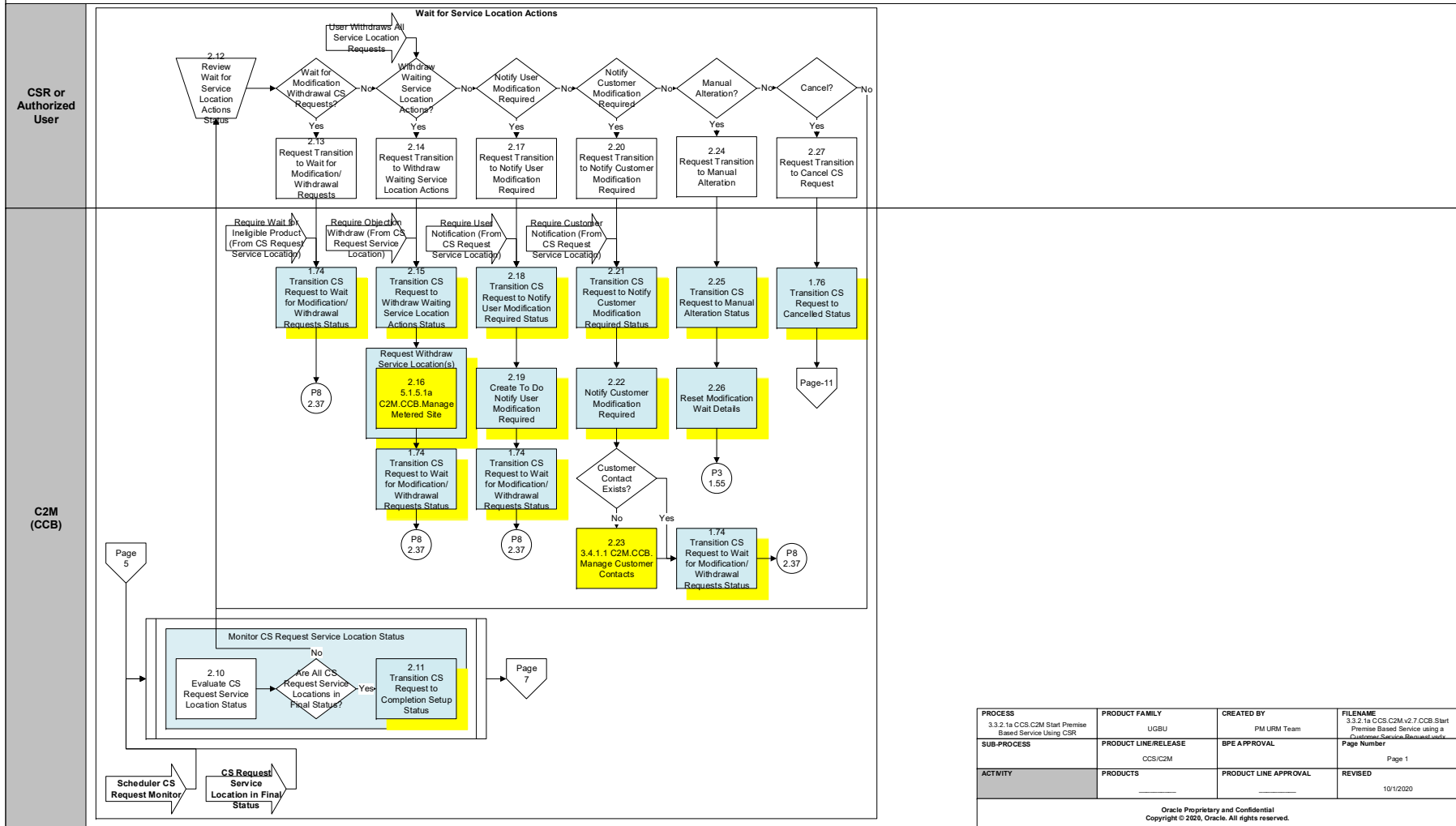
# Business Process Model Page 5

## 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



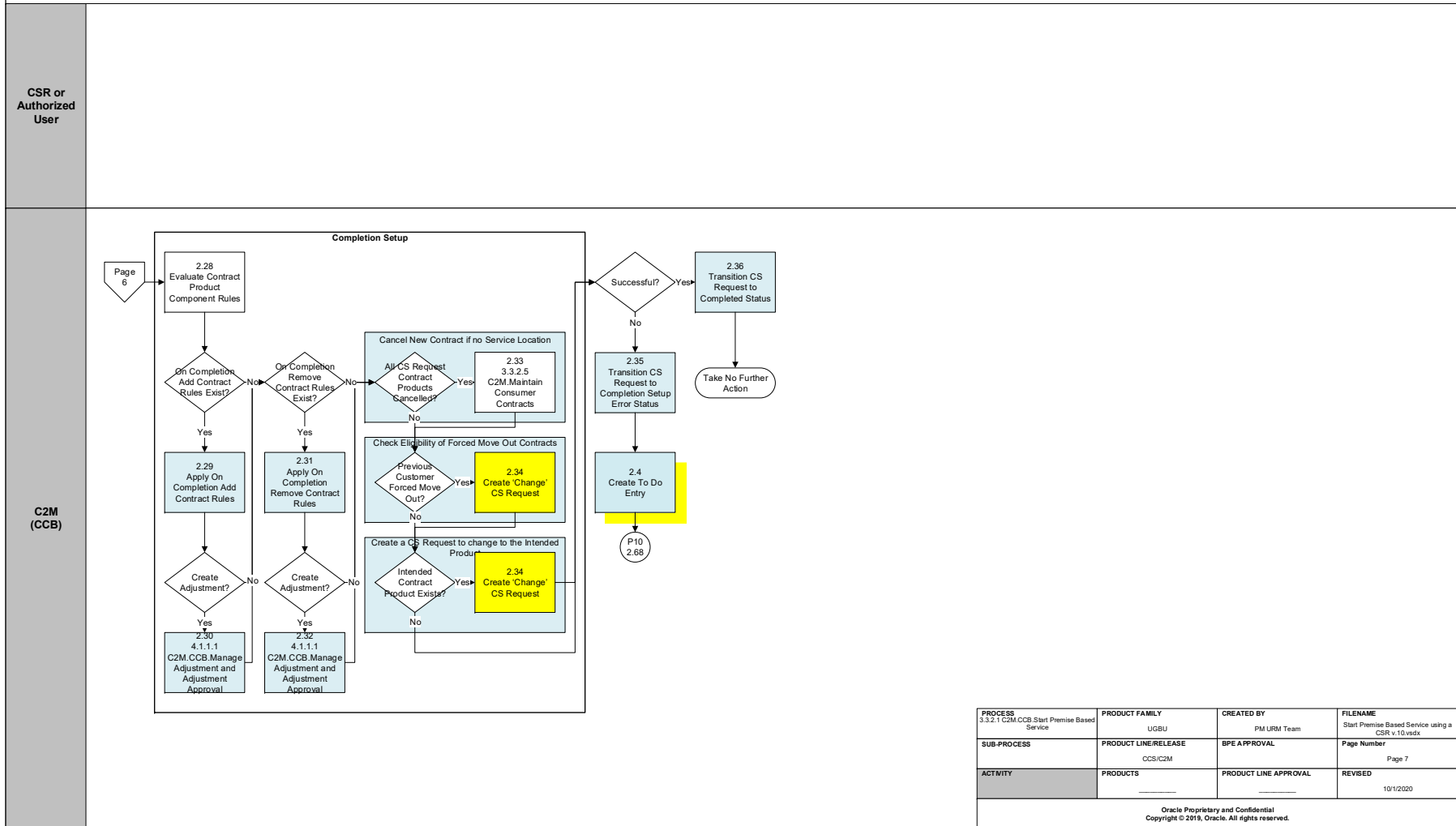
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### 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



# Business Process Model Page 7

## CCS Start Premise Based Service using CSR

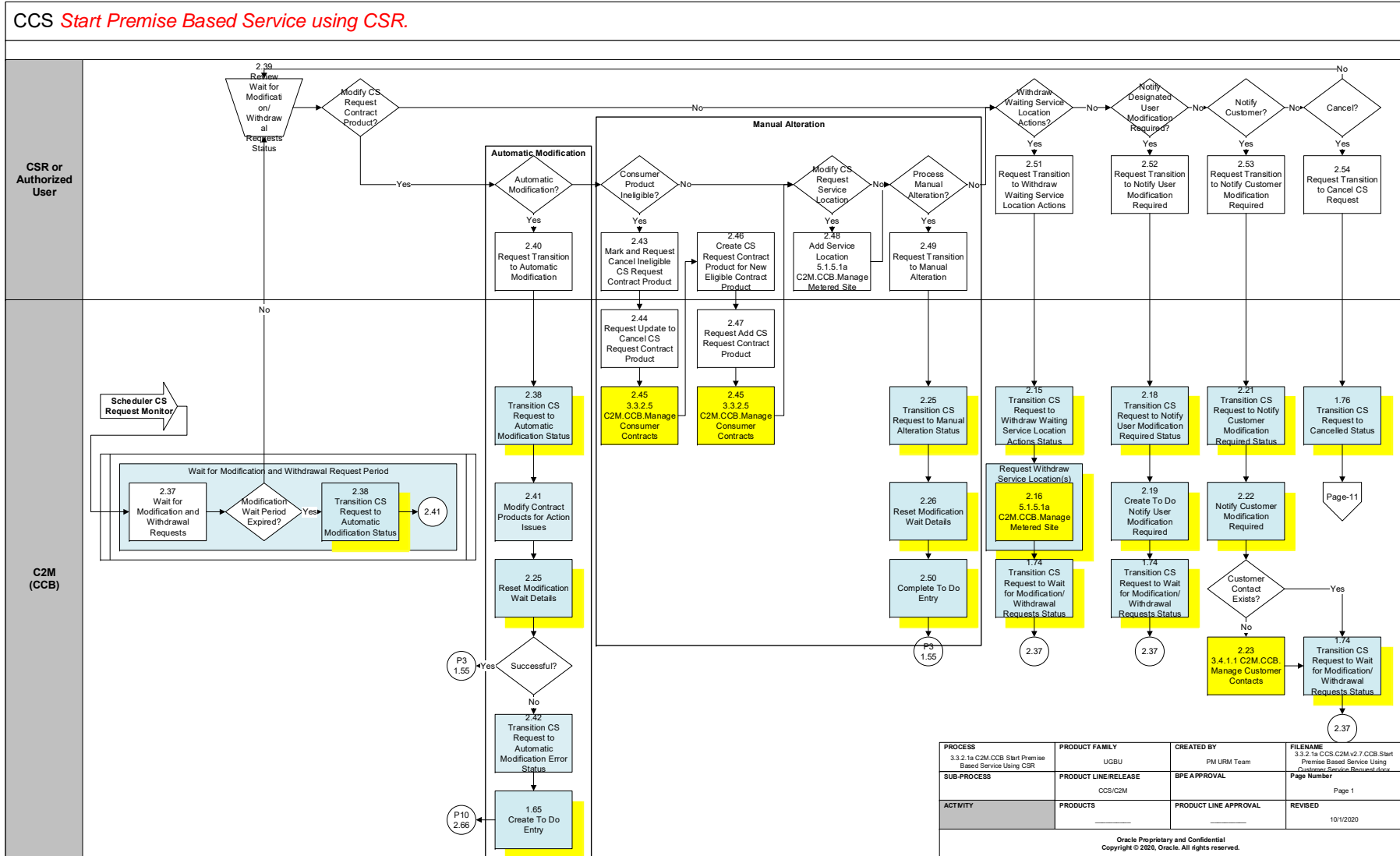


|   |  |                                  |   |
|---|--|----------------------------------|---|
| <b>PROCESS</b><br>3.3.2.1 C2M.CCB Start Premise Based Service | <b>PRODUCT FAMILY</b><br>UGBU          | <b>CREATED BY</b><br>PM LRM Team | <b>FILENAME</b><br>Start Premise Based Service using a CSR v10.usdx |
| <b>SUB-PROCESS</b>  | <b>PRODUCT LINE/RELEASE</b><br>CCS/C2M | <b>BPE APPROVAL</b>              | <b>Page Number</b><br>Page 7  |
| <b>ACTIVITY</b>   | <b>PRODUCTS</b>                        | <b>PRODUCT LINE APPROVAL</b>     | <b>REVISED</b><br>10/1/2020   |

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# Business Process Model Page 8

CCS *Start Premise Based Service using CSR.*

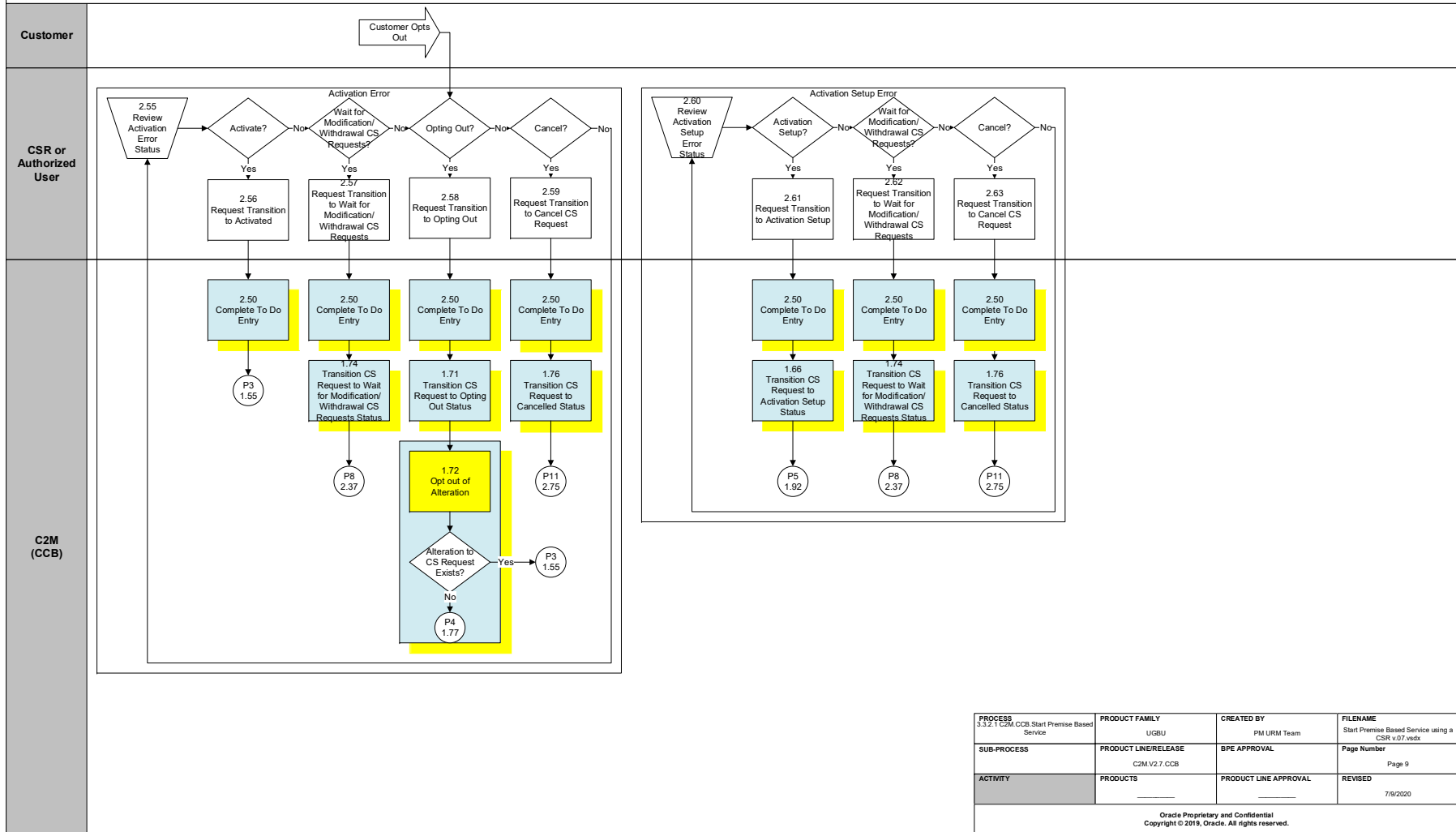


|  |                      |                       |   |
|--|----------------------|-----------------------|---|
| PROCESS  | PRODUCT FAMILY       | CREATED BY            | FILENAME  |
| 3.3.2.1a C2M.CCB Start Premise Based Service Using CSR | UGBU                 | PM URM Team           | 3.3.2.1a C2M.v2.7.CCB Start Premise Based Service Using Customer Service Request.docx |
| SUB-PROCESS  | PRODUCT LINE/RELEASE | BPE APPROVAL          | Page Number   |
|  | CCS/C2M              |                       | Page 1  |
| ACTIVITY   | PRODUCTS             | PRODUCT LINE APPROVAL | REVISED   |
|  |                      |                       | 10/1/2020   |

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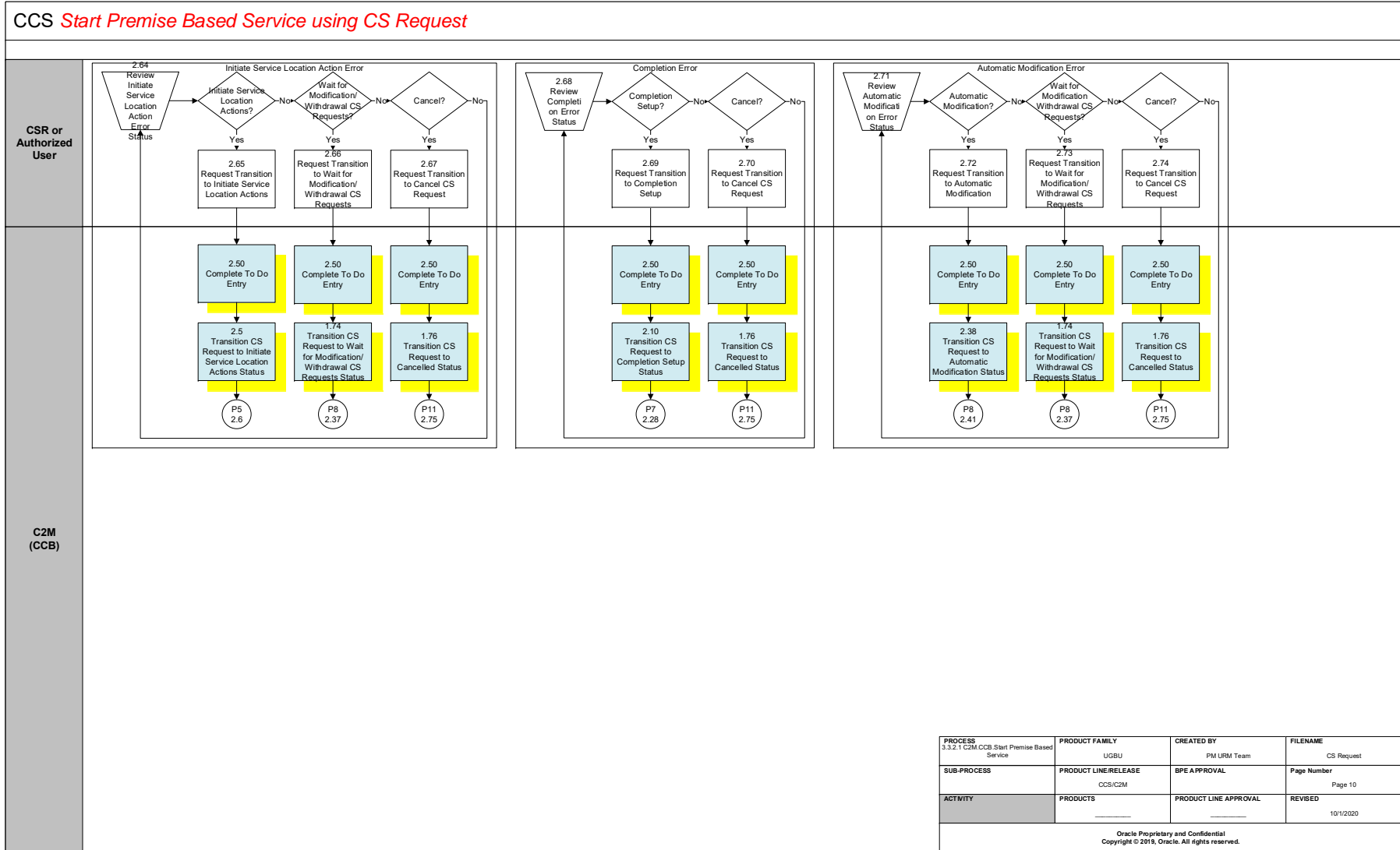
## Business Process Model Page 9

### CCS *Start Premise Based Service using CSR*



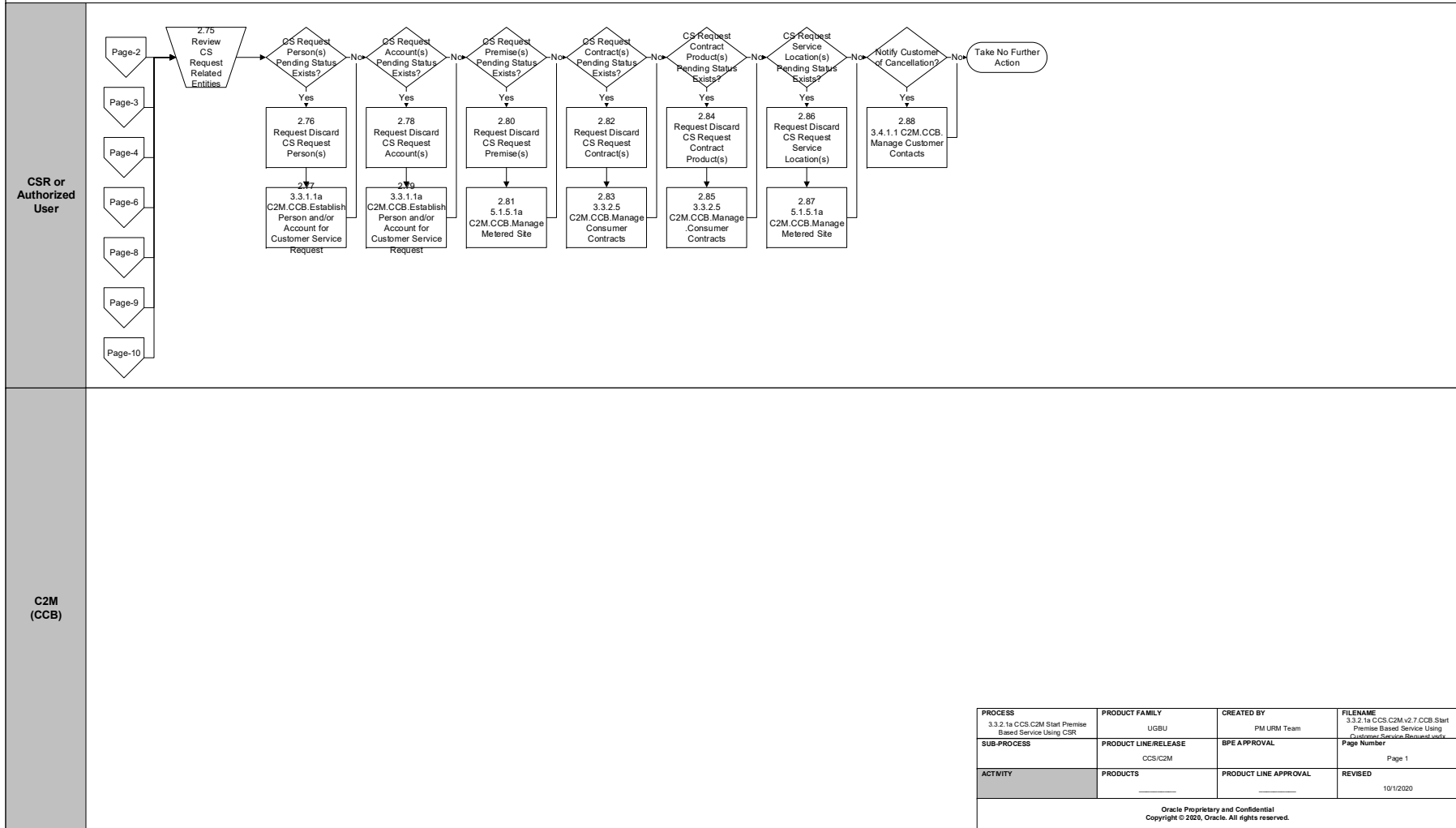
# Business Process Model Page 10

## CCS Start Premise Based Service using CS Request



# Business Process Model Page 11

## 3.3.2.1a CCS.C2M.v2.7.CCB Start Premise Based Service using Customer Service Request



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## Detail Business Process Model Description

### 1.1 Provide Supply Address and Customer Information

**Actor/Role:** Customer or 3<sup>rd</sup> Party Application User

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will provide the Supply Address and Customer Information to request a new service

### 1.2 Capture Supply and Customer Information

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will capture the Supply Address and Customer Information.

### 1.3 Request a list of Eligible Products

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will request for a list of Eligible Products based on the captured information from the C2M system

### 1.4 REST Adapter Request

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration will capture the request from the 3<sup>rd</sup> Party Application and pass it to the C2M system.

### 1.5 Identify Eligible Products

**Actor/Role:** C2M(CCB)

**Description:**

The C2M(CCB) will identify the list of eligible products for the provided supply address, customer information and eligibility criteria. The eligibility criteria could consider Consumer Contract Products that include Contract Rules to create:

- Premise Based Services
- Non-Premise Based Services
- Contract Milestones
- Adjustments
- NBB Service Agreements

**Available Plug-In(s)**

|   |
|---|
| C1-RetElPdCT - Retrieve List of Eligible Products for a Contract Type |
|---|

|  |
|--|
| C1-ConsumerContractType - Consumer Contract Type |
| C1-ConsumerProduct - Consumer Product            |



**Business Object**

|  |
|--|
| C1-ConsumerProductVersion - Consumer Product Version |
|--|

**Entities to Configure**

|                          |
|--------------------------|
| Consumer Contract Type   |
| Consumer Product         |
| Consumer Product Version |
| Characteristic Type      |

**1.6 REST Adapter Response**

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration will respond with the list of eligible products.

**1.7 Process and Present a list of Eligible Products for the Customer to Select**

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will present a list of Eligible Products for the Customer to Select.

**1.8 Review Eligible Products and Details**

**Actor/Role:** Customer or 3<sup>rd</sup> Party Application User

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will review the eligible products. The Customer or User may choose to request for Additional Product Information or Request a Service with a Selected Product.

**1.9 Request More Information About Product**

**Actor/Role:** Customer or 3<sup>rd</sup> Party Application User

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will select a product and request for more information about the selected product.

**1.10 Request More Information About Specific Product**

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will request for more information about the specific product.

**1.11 REST Adapter Request**

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration will capture the request from the 3<sup>rd</sup> Party Application and pass it to the C2M system.

**1.12 Identify Product Attributes for a Specific Product**

**Actor/Role:** C2M(CCB)

**Description:**

The C2M(CCB) will identify product attributes for the selected product.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-RetPAttOV - Retrieve Product Attributes for Operand Values |
| <b>Business Object</b>      | C1-ConsumerProduct - Consumer Product                         |
|                             | C1-ConsumerProductVersion - Consumer Product Version          |
|                             | C1-ConsumerProductComponent - Consumer Product Component      |
| <b>Entities</b>             | Consumer Product  |
|                             | Consumer Product Version                                      |
|                             | Consumer Product Component                                    |
|                             | Characteristic Type   |

**1.13 REST Adapter Response**

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration will respond with the list of product attributes.

**1.14 Process and Present the List of Product Attributes**

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will present the list of product attributes.

**1.15 Request Service with Selected Product**

**Actor/Role:** Customer or 3<sup>rd</sup> Party Application User

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will request service for the selected product

**1.16 Request Create and Activate CS Request**

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application triggers a CS Request creation.

**1.17 REST Adapter Request**

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration captures the CS Request and passes it to the C2M system.

**1.18 Add Customer Service Request**

**Actor/Role:** C2M(CCB)

**Description:**

Based on the customer information, supply information and selected product, a new CS Request will be created in the C2M(CCB).

|                               |   |
|-------------------------------|---|
| <b>Available Plug-In(s)</b>   | C1-AddCoChRe - Add Contract Change Request  |
| <b>Business Object</b>        | C1-ContractChangeRequest (Contract Change Request Root)<br>C1-ChangeContChangeRequest (Change Contract) |
| <b>Entities to Configure:</b> | Customer Service Request Type   |

**1.19 REST Adapter Response**

**Actor/Role:** Oracle Cloud Integration

**Description:**

The Oracle Cloud Integration will respond with the information of the newly created CS Request.

**1.20 Notify Customer New Service Application Status**

**Actor/Role:** 3<sup>rd</sup> Party Application

**Description:**

The 3<sup>rd</sup> Party Application will notify the Customer or the Application User about the newly created CS Request.

**1.21 Receive Notification**

**Actor/Role:** Customer or 3<sup>rd</sup> Party Application User

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will receive notification about the successful creation of a CS Request.

**1.22 Confirm Request Applicability**

**Actor/Role:** CSR or Authorized User

**Description:**

The Customer may also request New Service by contacting a CSR or an Authorized User. In this case, the CSR or Authorized User will check the request applicability.

**1.23 Search for Existing CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will search for the existing CS Request if the customer contacting about an existing CS Request.

**1.24 Select CS Request Type**

**Actor/Role:** CSR or Authorized User

**Description:**

If the customer is making a new request, the CSR or Authorized User selects the desired CS Request Type.

**1.25 Populate Required Data and Request Create CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User populates the required data and requests to create CS Request.

**1.26 Create CS Request in Draft Status**

**Actor/Role:** C2M(CCB)

**Description:**

Based on the selected CS Request Type, a new CS Request will be created in the C2M(CCB) in the Draft Status.

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**Entities to Configure:**

|                               |
|-------------------------------|
| Customer Service Request Type |
| Consumer Contract Type        |
| Market                        |
| Consumer Product              |
| Characteristic Type           |

**1.27 Review CS Request Initial Draft**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will review the newly created CS Request.

**1.28 Determine Supply Address**

**Actor/Role:** CSR or Authorized User

**Description:**

### 3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

The CSR or Authorized User will determine the supply address. The supply address must be captured in the C2M(CCB) system as a CS Request Premise.

#### 1.29 Create CS Request Premise 5.1.5.1a C2M.Manage Metered Site

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to the '5.1.5.1a C2M.Manage Metered Site' process to setup the desired CS Request Premise.

#### 1.30 Evaluate Customer

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will determine the customer information. The customer must be captured in the C2M(CCB) system as a CS Request Person and CS Request Account.

#### 1.31 3.3.1.1a C2M Establish Person and/or Account for Customer Service Request

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to the '3.3.1.1a C2M Establish Person and/or Account for Customer Service Request' process to setup the desired CS Request Person and Account.

#### 1.32 Request Credit Review From External Credit Bureau

**Actor/Role:** CSR or Authorized User

**Description:**

If required, the CSR or Authorized User will also request credit review from an external credit bureau. This requires a custom component to be created to integrate with the external credit bureau

#### 1.33 Provide External Credit Score Information

**Actor/Role:** External Credit Bureau

**Description:**

If a credit review has been requested, the external credit bureau will provide the required credit score information.

#### 1.34 Receive Results From External Credit Bureau

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will receive results from an external credit bureau. This requires a custom component to be created to integrate with the external credit bureau

#### 1.35 Evaluate External Credit Bureau Results

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will evaluate the external credit bureau results to determine if the customer is eligible for the service

**1.35.1 3.3.3.2 C2M.Determine Customer Deposits (Cash, Non-cash,3rd Party)**

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to the 'C2M.Determine Customer Deposits (Cash, Non-cash,3rd Party)' process to add a customer deposit.

**1.36 Search and Determine the Unique Market Identifier**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will inquire with the customer and determine the Unique Market Identifier. The Unique Market Identifier is a unique reference number for the contestable supply point

**1.37 Request Add CS Service Location 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to the '5.1.5.1a C2M.Manage Metered Site' process to add a CS Service Location.

**1.38 Determine and Select Contract Type**

**Actor/Role:** CSR or Authorized User

**Description:**

In order to create a CS Request Contract, the CSR or Authorized User will determine and select the Contract Type.

**1.39 Populate CS Request Contract Required Data**

**Actor/Role:** CSR or Authorized User

**Description:**

If a CS Request Contract does not exist within the CS Request, the CSR or Authorized User will select and populate the required data for selected CS Request Contract.

**1.40 Request Add CS Request Contract**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will request to add the CS Request Contract to the CS Request.

**1.41 Create CS Request Contract in Pending Status**

**Actor/Role:** C2M(CCB)

**Description:**

Based on the request, a new CS Request Contract will be created in the C2M(CCB) in the Pending Status.

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                               |  |
|-------------------------------|--|
| <b>Available Plug-In(s)</b>   | C1-CCNTINFO Customer Service Request Contract Information            |
|                               | C1-VALCSRCNT Validate Contract Change Request Contract Action        |
|                               | C1-CONACTFLG Add/Update Contract Action Flag                         |
| <b>Business Object</b>        | C1-ContractChangeReqContRoot (Contract Change Request Contract Root) |
|                               | C1-ChangeContChangeRequest (Change Contract)                         |
| <b>Entities to Configure:</b> | Consumer Contract Type   |

**1.42 Populate CS Request Contract Required Data**

**Actor/Role:** CSR or Authorized User

**Description:**

If a CS Request Contract already exists within the CS Request, the CSR or Authorized User will search for the Consumer Contract and populate/update the required data for this existing CS Request Contract.

**1.43 Request Update CS Request Contract**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will request to update the CS Request Contract for the CS Request.

**1.44 Update CS Request Contract in Pending Status**

**Actor/Role:** C2M(CCB)

**Description:**

Based on the request, the CS Request Contract will be updated in the C2M(CCB) in the Pending Status.

**1.45 Select Eligible Product for Contract**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will determine if a Product is required, and if a product is required, the user will select an Eligible Product for the Contract.

**1.46 Populate CS Request Contract Product Required Data**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will populate the required data for the selected CS Request Contract Product.

**1.47 Request Add CS Request Contract Product**

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will request to add the CS Request Contract Product to the CS Request for the specified CS Request Contract

**1.48 Create CS Request Contract Product in Pending Status**

**Actor/Role:** C2M(CCB)

**Description:**

Based on the request, a new CS Request Contract Product will be created in the C2M(CCB) in the Pending Status.

**Available Plug-In(s)**

|  |
|--|
| C1-CNPRDINFO Customer Service Request Contract Product Information |
| C1-VALCSRCP Validate CS Request Contract Product Action            |
| C1-CPACTFLG Add/Update Contract Product Action Flag                |

**Business Object**

|   |
|---|
| C1-ContractChangeReqCnProdRoot ( Contract Change Request Contract Product Root) |
| C1-ChangeContChangeRequest (Change Contract)                                    |

**Entities to Configure:**

|                     |
|---------------------|
| Consumer Product    |
| Characteristic Type |

**1.49 Populate Contract and Contract Product Data**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will review the CS Service Location, and if required, populate/update the required data for CS Request Contract and CS Request Contract Product.

**1.50 Request Update CS Service Location 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to the '5.1.5.1a C2M.Manage Metered Site' process to update the CS Service Location with the desired data from the CS Request Contract and CS Request Contract Product.

**1.51 Review CS Request in Draft Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User will review the CS Request, currently in a Draft Status. If required, the user can make changes to different entities such as CS Request Person/Account/Premise/Contract/Contract Product and CS Request Service Location.



**1.52 Request Transition to Expire CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

During the review, the CSR or Authorized User can request to expire the CS Request.

**1.53 Transition CS Request to Expire Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will be transitioned to Expire Status. All the entities within the CS Request will then be Discarded.

**1.54 Request Transition to Activate CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

After the review, the CSR or Authorized User can request to activate the CS Request.

**1.55 Transition CS Request to Activate Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition from a Pending to an Activated Status.

**Available Plug-In(s)**

|  |
|--|
| C1-CHGREQINF - Contract Change Request Information     |
| C1-VALCHGREQ - Contract Change Request Root Validation |

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**1.56 Set Activation Date**

**Actor/Role:** C2M(CCB)

**Description:**

The Activation Date will be set on the CS Request.

**Available Plug-In(s)**

|                                   |
|-----------------------------------|
| C1-SETACTDT - Set Activation Date |
|-----------------------------------|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**1.57 3.3.1.1a C2M Establish Person and/or Account for Customer Service Request**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request Person will be transitioned to the Process state to create a Person. Refer to '3.3.1.1a C2M Establish Person and/or Account for Customer Service Request' process for more details.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-TRAPERCRQ - Process Customer Service Request persons to Add/Update Persons |
| <b>Business Object</b>      | C1-ContractChangeReqPersonRoot (Contract Change Request Person Root)          |
|                             | C1-ChangeContChangeRequest (Change Contract)                                  |

**1.58 3.3.1.1a C2M Establish Person and/or Account for Customer Service Request**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request Account will be transitioned to the Process state to create an Account. Refer to '3.3.1.1a C2M Establish Person and/or Account for Customer Service Request' process for more details.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-TRAACCCRQ - Process Customer Service Request Accounts to Add/Update Account |
| <b>Business Object</b>      | C1-ContractChngeReqAccountRoot (Contract Change Request Account Root)          |
|                             | C1-ChangeContChangeRequest (Change Contract)                                   |

**1.59 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** C2M(CCB)

**Description:**

If the premise defined in the CS Request Premise already exists, the CS Request Premise will be transitioned to the Process state to update the existing Premise. Refer to '5.1.5.1a C2M.Manage Metered Site' process for more details.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-TRAPRECRQ - Process Customer Service Request Premises to Update Premise |
| <b>Business Object</b>      | C1-ContractChngeReqPremiseRoot (Contract Change Request Premise Root)      |
|                             | C1-ChangeContChangeRequest (Change Contract)                               |

**1.60 3.3.2.5 C2M.Maintain Consumer Contracts**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request Contract will be transitioned to the Process state to create a Consumer Contract. Refer to '3.3.2.5 C2M.Maintain Consumer Contracts' process for more details.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-TRACONCRQ - Process Customer Service Request Contracts to Add/Update Contracts |
|-----------------------------|---|

|                        |  |
|------------------------|--|
| <b>Business Object</b> | C1-ContractChangeReqContRoot (Contract Change Request Contract Root) |
|                        | C1-ChangeContChangeRequest (Change Contract)                         |

**1.61 3.3.2.5 C2M.Maintain Consumer Contracts**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request Contract Product(s) will be transitioned to the Process state to create Consumer Contract Product(s). Refer to '3.3.2.5 C2M.Maintain Consumer Contracts' process for more details.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-TRAPROCRQ - Process Customer Service Request Products to Add/Update Products |
|-----------------------------|---|

|                        |  |
|------------------------|--|
| <b>Business Object</b> | C1-ContractChangeReqCnProdRoot (Contract Change Request Contract Product Root) |
|                        | C1-ChangeContChangeRequest (Change Contract)                                   |

**1.62 Transition CS Request to Activation Error Status**

**Actor/Role:** C2M(CCB)

**Description:**

If there are any errors encountered during the processing of the CS Request Person, CS Request Account, Cs Request Premise, Cs Request Contract or CS Request Contract Product, the CS Request will transition to an Activation Error status.

**1.63 Create To Do Entry**

**Actor/Role:** C2M(CCB)

**Description:**

When the CS Request transitions to the Activation Error status, it will create a To Do for Customer Service Request.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-CSRERRTD - Create To Do for Customer Service Request |
|-----------------------------|---|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**1.64 Transition CS Request to Wait for Cooling Off Period Status**

**Actor/Role:** C2M(CCB)

**Description:**

If a Cooling Off Period has been defined on the CS Request Type, The CS Request will be transitioned to the Wait for Cooling off Period status  
If there is no requirement for to wait for a cooling off period, a custom algorithm can be created to transition the CS Request to the Wait for Cooling Off Period status, Wait for Other CS Request status and Activation Setup Status

**1.65 Transition CS Request to Wait for Other CS Requests Status**

**Actor/Role:** C2M(CCB)

**Description:**

If the end of the cooling off period is met, the CS Request transitions to Wait for Other CS Requests status

**1.66 Transition CS Request to Activation Setup Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request is transitioned to the Activation Setup status.

**1.67 Review Activate Status**

**Actor/Role:** CSR or Authorized User

**Description:**

If the custom auto transition to wait for cooling off period is not configured, the CSR or Authorized User can review the CS Request which will currently be in Activate status and determine whether to transition the CS Request to the following statuses:

- Wait for Cooling Off Period
- Wait for Other CS Requests
- Opting Out
- Wait for Modification/Withdrawal Requests
- Cancel

**1.68 Request Transition to Wait for Cooling Off Period Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Wait for Cooling Off Period status.

**1.69 Request Transition to Wait for Other CS Requests Status**

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Wait for Other CS Requests status.

**1.70 Request Transition to Opting Out Status**

**Actor/Role:** CSR or Authorized User

**Description:**

If the customer decides to opt out of the new service request, the CSR or Authorized User can request to transition the CS Request to the Opting Out status.

**1.71 Transition CS Request to Opting Out Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Opting Out status.

**1.72 Opt out of Alteration**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request is checked to determine if it can be transitioned to the Opting Out Status or automatically transition back to the Activate status if an alteration to the CS Request Contract, CS Request Contract Product or CS Request Service Location exists

**Available Plug-In(s)**

|                                      |
|--------------------------------------|
| C1-OPTOUT - Opting Out of Alteration |
|--------------------------------------|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**1.73 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

As part of the preprocessing of the CS Request when a product becomes ineligible, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

**1.74 Transition CS Request to Wait for Modification/Withdrawal Requests Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Wait for Modification/Withdrawal Requests status.

**1.75 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Description:**

The CSR or Authorized User can request to transition the CS Request to Cancelled status.

**1.76 Transition CS Request to Cancelled Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Cancelled status.

**1.77 Review Opting Out Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Opting Out status and transition the CS Request to the Opted Out status or return back to the Activated Status

**1.78 Request Transition to Opted Out Of Alteration**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to the Opted Out status.

**1.79 Transition CS Request to Opted Out Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Opted Out status.

**1.80 Request Transition to Activate CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

If the CSR or Authorized User decides not to Opt Out, the user can proceed the return the CS Request to the Activate status by requesting to transition the CS Request to Activate status.

**1.81 Wait for Cooling off period Expiry**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request monitors the cooling off period expiry. If the cooling period expires, it will transition to the next default status.

**Available Plug-In(s)**

|  |
|--|
| C1-CHKCOOLOF Check CS Request Cooling Off End<br>Date/Time |
| C1-ContractChangeRequest (Contract Change Request<br>Root) |

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Business Object**

C1-ChangeContChangeRequest (Change Contract)

**Background Process**

F1-GEN-BOMON - Transition to Default Next Status (Script)

**1.82 Review Cooling off Period Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Cooling off Period status and determine whether to transition the CS Request to the following statuses:

- Wait for Other CS Request
- Wait for Modification/Withdrawal Requests
- Opting Out
- Cancel

**1.83 Request Transition to Wait for Other CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Cooling off Period status, the CSR or Authorized User can bypass the Cooling Off Period and request to transition the CS Request to Wait for Other CS Request status.

**1.84 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Cooling off Period status, as part of the preprocessing of the CS Request when a product becomes ineligible, the CSR or Authorized User can bypass the Cooling Off Period and request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

**1.85 Request Transition to Opting Out Status**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Cooling off Period status, if the customer decides to opt out of the new service request, the CSR or Authorized User can request to transition the CS Request to Opting Out status.

**1.86 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Cooling off Period status, the CSR or Authorized User can request to transition the CS Request to Cancel status.

**1.87 Wait for Other CS Request(s)**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request monitors whether there are other CS Requests in progress. If there are no other CS Requests, it will transition to the next default status.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | F1-AT-RQ - Transition to Default Next Status (Script)     |
| <b>Business Object</b>      | C1-ContractChangeRequest (Contract Change Request Root)   |
|                             | C1-ChangeContChangeRequest (Change Contract)              |
| <b>Background Process</b>   | F1-GEN-BOMON - Transition to Default Next Status (Script) |

**1.82 Review Wait for Other CS Request(s) Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Wait for Other CS Request(s) status and determine whether to transition the CS Request to the following statuses:

- Wait for Modification/Withdrawal Requests
- Activation Setup
- Cancel

**1.89 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Wait for Other CS Request(s) status, as part of the preprocessing of the CS Request when a product becomes ineligible, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

**1.90 Request Transition to Activation Setup**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Wait for Other CS Request(s) status, the CSR or Authorized User can bypass the Wait for Other CS Requests status if there are no other associated CS Requests and request to transition the CS Request to Activation Setup status.

**1.91 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Wait for Other CS Request(s) status, the CSR or Authorized User can request to transition the CS Request to Cancel status.



**1.92 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** C2M(CCB)

**Description:**

As a part of Activation Setup, the CS Request Premise will be transitioned to the Process status to add the Premise. Refer to '5.1.5.1a C2M.Manage Metered Site' process for more information.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-TRAPRCRQA - Process Customer Service Request Premises to Add Premise |
| <b>Business Object</b>      | C1-ContractChangeRequest (Contract Change Request Root)                 |
|                             | C1-ChangeContChangeRequest (Change Contract)                            |

**1.93 Apply On Activation Add Contract Rules**

**Actor/Role:** C2M(CCB)

**Description:**

If there are 'On Activation - Add' Contract Rules configured, they will be applied here during the Activation Setup process.

|                               |  |
|-------------------------------|--|
| <b>Available Plug-In(s)</b>   | C1-APCRLAAPR - Apply Contract Rule On Activation Add For Contract Products |
| <b>Business Object</b>        | C1-ConsumerContractRule (Consumer Contract Rule)                           |
|                               | C1-ContractChangeRequest (Contract Change Request Root)                    |
|                               | C1-ChangeContChangeRequest (Change Contract)                               |
| <b>Entities to Configure:</b> | Consumer Contract Rule   |
|                               | Consumer Contract Product  |
|                               | Consumer Contract Product Component  |

**1.94 Create Contract Milestone(s)**

**Actor/Role:** C2M(CCB)

**Description:**

If there is a need to create Contract Milestone(s), they will be created here during the Activation Setup process.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-CHKREQVAL (Check the Required Values for Milestone) |
|                             | C1-ADDMSRULE (Add Contract Milestone Contract Rule)    |
|                             | C1-CCRuleAddContMilestone (Add Contract Milestone)     |

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**Entities to Configure:**

|                                     |
|-------------------------------------|
| Consumer Contract Milestone Type    |
| Consumer Contract Rule              |
| Consumer Contract Product           |
| Consumer Contract Product Component |

**1.95 Start Non-Premise Based Service Agreement**

**Actor/Role:** C2M(CCB)

**Description:**

If there is a need to Start Non-Premise based Service Agreement(s), they will be created here during the Activation Setup process.

**1.96 Apply On Activation Remove Contract Rules**

**Actor/Role:** C2M(CCB)

**Description:**

If there are 'On Activation - Remove' Contract Rules configured, they will be applied here during the Activation Setup process.

**Available Plug-In(s)**

|  |
|--|
| C1-APCRLARPR - Apply Contract Rule Activation Remove For Contract Products |
|--|

**Business Object**

|   |
|---|
| C1-ConsumerContractRule (Consumer Contract Rule)        |
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**Entities to Configure:**

|                                     |
|-------------------------------------|
| Consumer Contract Rule              |
| Consumer Contract Product           |
| Consumer Contract Product Component |

**1.97 Expire Contract Milestone(s)**

**Actor/Role:** C2M(CCB)

**Description:**

If there is a need to expire Contract Milestone(s), they can be expired here during the Activation Setup process.

**Available Plug-In(s)**

|  |
|--|
| C1-CCRuleRemoveContMilestone - Remove Contract Milestone |
|--|

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                               |   |
|-------------------------------|---|
| <b>Business Object</b>        | C1-ConsumerContractRule (Consumer Contract Rule)        |
|                               | C1-ContractChangeRequest (Contract Change Request Root) |
|                               | C1-ChangeContChangeRequest (Change Contract)            |
| <b>Entities to Configure:</b> | Consumer Contract Milestone Type                        |
|                               | Consumer Contract Rule                                  |
|                               | Consumer Contract Product                               |
|                               | Consumer Contract Product Component                     |

**1.98 Apply Service Location Remove Contract Rules for Contract Product**

**Actor/Role:** C2M(CCB)

**Description:**

If there are 'Service Location – Remove' Contract Rules configured, they will be applied here during the Activation Setup process.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-APPLSLREM - Apply service location remove contract rule for contract product |
|-----------------------------|---|

|                        |   |
|------------------------|---|
| <b>Business Object</b> | C1-ConsumerContractRule (Consumer Contract Rule)        |
|                        | C1-ContractChangeRequest (Contract Change Request Root) |
|                        | C1-ChangeContChangeRequest (Change Contract)            |

|                               |                                     |
|-------------------------------|-------------------------------------|
| <b>Entities to Configure:</b> | Consumer Contract Rule              |
|                               | Consumer Contract Product           |
|                               | Consumer Contract Product Component |

**1.99 Stop Service Agreement Linked to Existing Registration Point**

**Actor/Role:** C2M(CCB)

**Description:**

If it is an already an existing Registration Point but the Service Location is not related to the Registration Point, then the existing Service Agreement linked to the Registration Point will be Stopped. This is the scenario where the Registration Point has been removed from an existing Service Location (i.e. 'Back to Back' process) to be used for a new customer

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-StopCancelSvcLocSA - Stop or Cancel Service Agreement for a Service Location |
|-----------------------------|---|

|  |
|--|
| C1-RegistrationPoint (Registration Point)        |
| C1-ConsumerContractRule (Consumer Contract Rule) |

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                        |   |
|------------------------|---|
| <b>Business Object</b> | C1-ContractChangeRequest (Contract Change Request Root) |
|                        | C1-ChangeContChangeRequest (Change Contract)            |

|                               |                                     |
|-------------------------------|-------------------------------------|
| <b>Entities to Configure:</b> | Registration Point                  |
|                               | Service Agreement                   |
|                               | Consumer Contract Rule              |
|                               | Consumer Contract Product           |
|                               | Consumer Contract Product Component |

**2.1 Apply Service Location Add Contract Rules for Contract Product**

**Actor/Role:** C2M(CCB)

**Description:**

If there are 'Service Location - Add' Contract Rules configured, they will be applied here during the Activation Setup process.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-APPLSLADD - Apply service location add contract rule for contract product |
|                             |  |

|                        |   |
|------------------------|---|
| <b>Business Object</b> | C1-CsrSvcLocMarketProcessRoot (Contract Service Location Market Process Root) |
|                        | C1-ConsumerContractRule (Consumer Contract Rule)                              |

|                               |                                     |
|-------------------------------|-------------------------------------|
| <b>Entities to Configure:</b> | Consumer Contract Rule              |
|                               | Consumer Contract Product           |
|                               | Consumer Contract Product Component |

**2.2 Start Service Agreement for Existing Registration Point**

**Actor/Role:** C2M(CCB)

**Description:**

If it is an already existing Registration Point and the Service Location is related to the Registration Point, then a new Service Agreement will be Started for this existing Registration Point. This is the scenario where the new customer starts a service where the Registration Point is known (i.e. an existing customer has already registered for this supply) to start the 'Back to Back' process.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-CCRuleCreateSA - Create a Service Agreement   |
|                             | C1-RegistrationPoint (Registration Point)        |
|                             | C1-ConsumerContractRule (Consumer Contract Rule) |

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**Entities to Configure:**

|                                     |
|-------------------------------------|
| Registration Point                  |
| Service Agreement                   |
| Consumer Contract Rule              |
| Consumer Contract Product           |
| Consumer Contract Product Component |

**2.3 Transition CS Request to Activation Setup Error Status**

**Actor/Role:** C2M(CCB)

**Description:**

If the Activation Setup process was not successful, the CS Request will transition to Activation Setup Error status.

**2.4 Create To Do Entry**

**Actor/Role:** C2M(CCB)

**Description:**

When the CS Request transitions to Activation Setup Error status, it will create a To Do for Customer Service Request.

**Available Plug-In(s)**

|   |
|---|
| C1-CSRERRTD - Create To Do for Customer Service Request |
|---|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**2.5 Transition CS Request to Initiate Service Location Actions Status**

**Actor/Role:** C2M(CCB)

**Description:**

If the Activation Setup process was successful, the CS Request will transition to Initiate Service Location Actions status.

**2.6 Initiate CS Request Service Location Processing**

**Actor/Role:** C2M(CCB)

**Description:**

The Initiate Service Location Actions status will try to start the processing for CS Request Service Location.

**Available Plug-In(s)**

|  |
|--|
| C1-TRASLACRQ - Perform the related CS Request Service Locations Action |
|--|

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Business Object**

|   |
|---|
| C1-CsrSvcLocMarketProcessRoot (Contract Service Location Market Process Root) |
| C1-ContractChangeRequest (Contract Change Request Root)                       |
| C1-ChangeContChangeRequest (Change Contract)                                  |

**2.7 Transition CS Request to Initiate Service Location Action Error Status**

**Actor/Role:** C2M(CCB)

**Description:**

If the CS Request Service Location processing cannot be initiated, CS Request will transition to Initiate Service Location Action Error status.

**2.8 Activate CS Request Service Location(s) 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** C2M(CCB)

**Description:**

If the CS Request Service Location processing was successfully initiated, CS Request Service Location will be transitioned from a 'Pending' to 'Perform Action' Status to start the CS Request Service Location processing. Refer to '5.1.5.1a C2M.Manage Metered Site' process for more information.

**2.9 Transition CS Request to Wait for Service Location Actions Status**

**Actor/Role:** C2M(CCB)

**Description:**

While the CS Request Service Location is being processed, the CS Request will transition to Wait for Service Location Actions status to wait for all CS Request Service Location(s) to be processed

**2.10 Evaluate CS Request Service Location Status**

**Actor/Role:** C2M(CCB)

**Description:**

During the Wait for Service Location Actions status, the CS Request will monitor the Status of CS Request Service Locations.

**Available Plug-In(s)**

|  |
|--|
| C1-TRNSCSR - Monitor and transition Customer Service Request |
|--|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root)                       |
| C1-ChangeContChangeRequest (Change Contract)                                  |
| C1-CsrSvcLocMarketProcessRoot (Contract Service Location Market Process Root) |

**Background Process**

|   |
|---|
| F1-GEN-BOMON - Transition to Default Next Status (Script) |
|---|

### **2.11 Transition CS Request to Completion Setup Status**

**Actor/Role:** C2M(CCB)

**Description:**

If all the CS Request Service Locations are in a 'Final' Status Condition, the CS Request will transition to the Completion Setup status.

### **2.12 Review Wait for Service Location Actions Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request while it is in Wait for Service Location Actions status and determine whether to transition the CS Request to the following statuses:

- Wait for Modification/Withdrawal Requests
- Withdraw Waiting Service Location Actions
- Notify User Modification Required
- Notify Customer Modification Required
- Manual Alteration
- Cancel

### **2.13 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Wait for Service Location Actions status, as part of the preprocessing of the CS Request when a product becomes ineligible, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

### **2.14 Request Transition to Withdraw Waiting Service Location Actions**

**Actor/Role:** CSR or Authorized User

**Description:**

If the CSR or Authorized User determines that the CS Request Service Location Actions are no longer required, the CSR or Authorized User can request to transition the CS Request to Withdraw Waiting Service Location status. This will attempt transition all the CS Request Service Locations to a 'Request Withdraw' status where applicable

### **2.15 Transition CS Request to Withdraw Waiting Service Location Actions Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Withdraw Waiting Service Location Actions status.

### **2.16 2.16 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** C2M(CCB)

**Description:**

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

When the CS Request transitions to Withdraw Waiting Service Location Actions status, it will pass a request to transition the associated CS Request Service Location(s) to a 'Request Withdraw' Status. Refer to '5.1.5.1a C2M.Manage Metered Site' process for more information.

**2.17 Request Transition to Notify User Modification Required**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Notify User Modification Required status. This transition is typically performed by the CS Request Service Location when user modification is required where the CS Request Service Location is Objected, Rejected or Consumer Product is no longer eligible

**2.18 Transition CS Request to Notify User Modification Required Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Notify User Modification Required status.

**2.19 Create To Do Notify User Modification Required**

**Actor/Role:** C2M(CCB)

**Description:**

When the CS Request transitions to Notify User Modification Required status, it will create a To Do.

|                               |   |
|-------------------------------|---|
| <b>Available Plug-In(s)</b>   | C1-NTUSRMODR - Notify User Modification is Required   |
| <b>Business Object</b>        | C1-ContractChangeRequest (Contract Change Request Root)<br>C1-ChangeContChangeRequest (Change Contract) |
| <b>Entities to Configure:</b> | To Do Type<br>To Do Role  |
| <b>Background Process</b>     | F1-GEN-BOMON - Transition to Default Next Status (Script)   |

**2.20 Request Transition to Notify Customer Modification Required**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Notify Customer Modification Required status. This transition is typically performed by the CS Request Service Location when customer modification is required where the CS Request Service Location is Objected, Rejected or Consumer Product is no longer eligible

**2.21 Transition CS Request to Notify Customer Modification Required Status**

**Actor/Role:** C2M(CCB)



3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Description:**

The CS Request will transition to Notify Customer Modification Required status.

**2.22 Notify Customer Modification Required**

**Actor/Role:** C2M(CCB)

**Description:**

In order to notify the customer, either a Customer Contact or a Notification can be created.

|                               |   |
|-------------------------------|---|
| <b>Available Plug-In(s)</b>   | C1-NTCUSTMOD - Notify Customer Modification is Required   |
| <b>Business Object</b>        | C1-ContractChangeRequest (Contract Change Request Root)   |
|                               | C1-ChangeContChangeRequest (Change Contract)              |
| <b>Entities to Configure:</b> | Customer Contact Type                                     |
|                               | Customer Contact Class                                    |
|                               | Notification Type   |
| <b>Background Process</b>     | F1-GEN-BOMON - Transition to Default Next Status (Script) |

**2.23 3.4.1.1 C2M.Manage Customer Contacts**

**Actor/Role:** C2M(CCB)

**Description:**

In order to notify the customer using a customer contact, refer to '3.4.1.1 C2M.Manage Customer Contacts' process.

**2.24 Request Transition to Manual Alteration**

**Actor/Role:** CSR or Authorized User

**Description:**

When a CSR or Authorized User is notified through a To Do that a modification is required, once the modifications have been performed, the CSR or Authorized User can request to transition the CS Request to Manual Alteration status.

**2.25 Transition CS Request to Manual Alteration Status**

**Actor/Role:** C2M(CCB)

**Description:**

The CS Request will transition to Manual Alteration status.

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-RSTMODWT - Reset Modification Wait Details                            |
|                             | C1-ConAltPre Basic Contract Alteration UI Map Pre-Processing             |
|                             | C1-CSRequestAlteration Customer Service Request Contract Product Details |
|                             | C1-ConAltPos Basic Contract Alteration UI Map Post-Processing            |
| <b>Business Object</b>      | C1-ContractChangeRequest (Contract Change Request Root)                  |
|                             | C1-ChangeContChangeRequest (Change Contract)                             |

**2.26 Reset Modification Wait Details**

**Actor/Role:** C2M(CCB)

**Description:**

This algorithm type is used to reset the elements used in the wait for modification processing:

- Modification Wait Until Date/Time
- Modification To Do Entry Created
- Modification Customer Notification Sent status.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-RSTMODWT - Reset Modification Wait Details           |
| <b>Business Object</b>      | C1-ContractChangeRequest (Contract Change Request Root) |
|                             | C1-ChangeContChangeRequest (Change Contract)            |

**2.27 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to a Cancelled status.

**2.28 Evaluate Contract Product Component Rules**

**Actor/Role:** C2M(CCB)

**Description:**

When the CS Request is in Completion Setup Status, the system evaluates the Consumer Contract Product and Consumer Contract Product Component Contract eligibility criteria in order to determine if the Consumer Contract Product is still valid for the CS Request Service Location(s) that were processed

**2.29 Apply On Completion Add Contract Rules**

**Actor/Role:** C2M(CCB)

### 3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

#### Description:

If there are 'On Completion - Add' Contract Rules configured, they will be applied here during the Completion Setup process.

|                               |   |
|-------------------------------|---|
| <b>Available Plug-In(s)</b>   | C1-APCRLCAPR - Apply Contract Rule Completion Add For Contract Products |
| <b>Business Object</b>        | C1-ConsumerContractRule (Consumer Contract Rule)                        |
|                               | C1-ContractChangeRequest (Contract Change Request Root)                 |
|                               | C1-ChangeContChangeRequest (Change Contract)                            |
| <b>Entities to Configure:</b> | Consumer Contract Rule  |
|                               | Consumer Contract Product   |
|                               | Consumer Contract Product Component                                     |
| <b>Background Process</b>     | F1-AT-RQ - Transition to Default Next Status (Script)                   |

### 2.30 4.1.1.1 C2M.CCB.v2.6.Manage Adjustment and Adjustment Approval

Actor/Role: C2M(CCB)

#### Description:

If there is a need to create Adjustments, an Adjustment will be created by the configured Contract Rule. For more information refer to '4.1.1.1 C2M.CCB.Manage Adjustment and Adjustment Approval' process.

|                               |  |
|-------------------------------|--|
| <b>Business Object</b>        | C1-AdjustmentType (Adjustment Type - Main Details)         |
|                               | C1-Adjustment (Adjustment)                                 |
|                               | C1-AdjustmentApprovalProfile (Adjustment Approval Profile) |
| <b>Entities to Configure:</b> | Adjustment Type  |
|                               | Approval Profile   |

### 2.31 Apply On Completion Remove Contract Rules

Actor/Role: C2M(CCB)

#### Description:

If there are 'On Completion - Remove' Contract Rules configured, they will be applied here during the Completion Setup process.

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                               |   |
|-------------------------------|---|
| <b>Available Plug-In(s)</b>   | C1-APCRLCRPR - Apply Contract Rule Completion Remove For Contract Products  |
| <b>Business Object</b>        | C1-ConsumerContractRule (Consumer Contract Rule)<br>C1-ContractChangeRequest (Contract Change Request Root)<br>C1-ChangeContChangeRequest (Change Contract) |
| <b>Entities to Configure:</b> | Consumer Contract Rule<br>Consumer Contract Product<br>Consumer Contract Product Component  |
| <b>Background Process</b>     | F1-AT-RQ - Transition to Default Next Status (Script)   |

[2.32](#) [4.1.1.1](#) C2M.CCB.v2.6.Manage Adjustment and Adjustment Approval

**Actor/Role:** C2M(CCB)

**Description:**

Removal of contract rules may create adjustments. For more information refer to '4.1.1.1 C2M.CCB.Manage Adjustment and Adjustment Approval' process.

|                               |  |
|-------------------------------|--|
| <b>Business Object</b>        | C1-AdjustmentType (Adjustment Type - Main Details)<br>C1-Adjustment (Adjustment)<br>C1-AdjustmentApprovalProfile (Adjustment Approval Profile) |
| <b>Entities to Configure:</b> | Adjustment Type<br>Approval Profile  |

[2.33](#) [3.3.2.5](#) C2M.Maintain Consumer Contracts

**Actor/Role:** C2M(CCB)

**Description:**

If all the Consumer Contract Products are Cancelled, the Consumer Contract will be cancelled. Please refer to the '3.3.2.5 C2M.Maintain Consumer Contracts' process.

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | C1-CANCONSL - Cancel New Contract if no Service Location |
|-----------------------------|--|

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

|                           |  |
|---------------------------|--|
| <b>Business Object</b>    | C1-ContractChangeReqContRoot (Contract Change Request Contract Root)   |
|                           | C1-ContractChangeReqContBasic (Contract Change Request Contract Basic) |
| <b>Background Process</b> | F1-AT-RQ - Transition to Default Next Status (Script)                  |

**2.34 Create 'Change' CS Request**

**Actor/Role:** C2M(CCB)

**Description:**

If the previous customer was 'Forced move out', i.e. a 'Back to Back' has occurred, a 'Change' CS Request will be created for the previous customer to stop the CS Request Service Location(s) and end the Consumer Contract and Consumer Contract Product(s).

If there is a need to change the Consumer Contract Product to the Intended Consumer Contract Product, a 'Change CS Request' will be created. This typically occurs when a specific Consumer Contract Product must be processed initially in order for the Intended Consumer Contract Product to be allowed to be processed

|                             |  |
|-----------------------------|--|
| <b>Available Plug-In(s)</b> | CM-CHKELGPMC - Check Eligibility of Forced Move Out Contracts          |
|                             | CM-CRCSRINPR - Create a CS Request to change to the intended Product   |
| <b>Business Object</b>      | C1-ContractChangeReqContRoot (Contract Change Request Contract Root)   |
|                             | C1-ContractChangeReqContBasic (Contract Change Request Contract Basic) |
| <b>Background Process</b>   | F1-AT-RQ - Transition to Default Next Status (Script)                  |

**2.35 Transition CS Request to Completion Setup Error Status**

**Actor/Role:** C2M(CCB)

**Description:**

If there are any issues during the Completion Setup process, the CS Request will transition to Completion Setup Error status.

**2.36 Transition CS Request to Completed Status**

**Actor/Role:** C2M(CCB)

**Description:**

If there no issues during the Completion Setup process, the CS Request will transition to Completed status.

**2.37 Wait for Modification and Withdrawal Requests**

**Actor/Role:** C2M(CCB)

**Description:**

During this status, the CS Request waits until a specified modification wait period for all withdrawal requests to be complete, it will then transition the CS Request to the next default state.

**Available Plug-In(s)**

|  |
|--|
| C1-WTMDWTHRQ - Wait for Modification and Withdrawal Requests |
|--|

**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**Background Process**

|   |
|---|
| F1-GEN-BOMON - Transition to Default Next Status (Script) |
|---|

**2.38 Transition CS Request to Automatic Modification Status**

**Actor/Role:** C2M(CCB)

**Description:**

If the modification wait period expires, the CS Request transitions to the Automatic Modification status.

**2.39 Review Wait for Modification/Withdrawal Requests Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Wait for Modification/Withdrawal Requests status and determine whether to transition the CS Request to the following statuses:

- Automatic Modification
- Manual Alteration
- Withdraw Waiting Service Location Actions
- Notify User Modification Required
- Notify Customer Modification Required
- Cancel

**2.40 Request Transition to Automatic Modification**

**Actor/Role:** CSR or Authorized User

**Description:**

### 3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

The CSR or Authorized User can bypass the modification wait period and request to transition the CS Request to Automatic Modification status.

#### **2.41 Modify Contract Products for Action Issues**

**Actor/Role:** C2M(CCB)

**Description:**

This algorithm modifies the Customer Service Request to accommodate the impact of the market process having failed or a won registration point's metering being different from expected. The algorithm supports action issues related to Registration Points.

|                             |   |
|-----------------------------|---|
| <b>Available Plug-In(s)</b> | C1-MODCPAI - Modify Contract Products for action issues   |
| <b>Business Object</b>      | C1-ContractChangeRequest (Contract Change Request Root)<br>C1-ChangeContChangeRequest (Change Contract) |
| <b>Background Process</b>   | F1-AT-RQ - Transition to Default Next Status (Script)   |

#### **2.42 Transition CS Request to Automatic Modification Error Status**

**Actor/Role:** C2M(CCB)

**Description:**

If Automatic Modification is not successful, the CS Request will transition to Automatic Modification Error status.

#### **2.43 Mark and Request Cancel Ineligible CS Request Contract Product**

**Actor/Role:** CSR or Authorized User

**Description:**

When an ineligible Consumer Product is encountered, the CSR or Authorized User can mark the CS Request Contract Product as cancelled and request to cancel the Ineligible CS Request Contract Product.

#### **2.44 Request Update to Cancel CS Request Contract Product**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User requests an update to process the Cancelled CS Request Contract Product.

#### **2.45 3.3.2.5 C2M.Maintain Consumer Contracts**

**Actor/Role:** C2M(CCB)

**Description:**

Refer to '3.3.2.5 C2M.Maintain Consumer Contracts' process.

#### **2.46 Create CS Request Contract Product for New Eligible Contract Product**

**Actor/Role:** CSR or Authorized User

3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

**Description:**

Once the ineligible Consumer Contract Product is cancelled, the CSR or Authorized User can create a new CS Request Contract Product for New Eligible Contract Product in a Pending status

**2.47 Request Add CS Request Contract Product**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can Request Add CS Request Contract Product.

**2.48 Add Service Location 5.1.5.1a C2M.Manage Metered Site**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can add a CS Request Service Location to the CS Request if required for a CS Request Contract Product. Refer to '5.1.5.1a C2M.Manage Metered Site' process for more details.

**2.49 Request Transition to Manual Alteration**

**Actor/Role:** CSR or Authorized User

**Description:**

Once all of the user modifications are complete, the CSR or Authorized User can Request Transition to Manual Alteration.

**Available Plug-In(s)**

|  |
|--|
| C1-UPDATEALT - Update Customer Service Request Alteration Switch         |
| C1-ConAltPre Basic Contract Alteration UI Map Pre-Processing             |
| C1-CSRequestAlteration Customer Service Request Contract Product Details |
| C1-ConAltPos Basic Contract Alteration UI Map Post-Processing            |
| C1-ContractChangeRequest (Contract Change Request Root)                  |
| C1-ChangeContChangeRequest (Change Contract)                             |

**Business Object**

**2.50 Complete To Do Entry**

**Actor/Role:** C2M(CCB)

**Description:**

During the Manual Alteration Status, after the Reset Modification Wait Details, the To Do entry will be Completed.

**Available Plug-In(s)**

|   |
|---|
| F1-TODOCOMPL - Generic To Do Completion |
|---|



**Business Object**

|   |
|---|
| C1-ContractChangeRequest (Contract Change Request Root) |
| C1-ChangeContChangeRequest (Change Contract)            |

**2.51 Request Transition to Withdraw Waiting Service Location Actions**

**Actor/Role:** CSR or Authorized User

**Description:**

If the CSR or Authorized User determines that the CS Request Service Location Actions are no longer required, the CSR or Authorized User can request to transition the CS Request to Withdraw Waiting Service Location status. This will attempt transition all the CS Request Service Locations to a 'Request Withdraw' status where applicable

**2.52 Request Transition to Notify User Modification Required**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Notify User Modification Required status. This transition is typically performed by the CS Request Service Location when user modification is required where the CS Request Service Location is Objected, Rejected or Consumer Product is no longer eligible

**2.53 Request Transition to Notify Customer Modification Required**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Notify Customer Modification Required status. This transition is typically performed by the CS Request Service Location when customer modification is required where the CS Request Service Location is Objected, Rejected or Consumer Product is no longer eligible

**2.54 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to transition the CS Request to Cancelled status.

**2.55 Review Activation Error Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Activation Error status and determine whether to transition the CS Request to the following statuses:

- Activate
- Wait for Modification /Withdrawal Requests
- Opting Out
- Cancel

**2.56 Request Transition to Activated**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Error status, the CSR or Authorized User can request to transition the CS Request back to the Activated status.

**2.57 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Error status for a modification to the CS Request, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

**2.58 Request Transition to Opting Out Status**

**Actor/Role:** CSR or Authorized User

**Description:**

If a customer requests to opt out of the new service request, the CSR or Authorized User can request to transition the CS Request to Opting Out status.

**2.59 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Error status, the CSR or Authorized User can request to transition the CS Request to Cancelled status.

**2.60 Review Activation Setup Error Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Activation Setup Error status and determine whether to transition the CS Request to the following statuses:

- Activation Setup
- Wait for Modification /Withdrawal Requests
- Cancel

**2.61 Request Transition to Activation Setup**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Setup Error status, the CSR or Authorized User can request to transition the CS Request back to the Activation Setup status.

**2.62 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Setup Error status for a modification to the CS Request, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

### **2.63 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Activation Setup Error status, the CSR or Authorized User can request to transition the CS Request to Cancelled status.

### **2.64 Review initiate Service Location Action Error Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Initiate Service Location Action Error status and determine whether to transition the CS Request to the following statuses:

- Initiate Service Location Actions
- Wait for Modification /Withdrawal Requests
- Cancel

### **2.65 Request Transition to Initiate Service Location Actions**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Initiate Service Location Actions Error status, the CSR or Authorized User can request to transition the CS Request back to the Initiate Service Location status.

### **2.66 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Initiate Service Location Action Error status for a modification to the CS Request, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

### **2.67 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Initiate Service Location Actions Error status, the CSR or Authorized User can request to transition the CS Request to Cancelled status.

### **2.68 Review Completion Setup Error Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Completion Setup Error status and determine whether to transition the CS Request to the following statuses:

- Completion Setup
- Cancel

**2.69 Request Transition to Completion Setup**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Completion Setup Error status, the CSR or Authorized User can request to transition the CS Request back to the Completion Setup status.

**2.70 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Completion Setup Error status, the CSR or Authorized User can request to transition the CS Request to Cancelled status.

**2.71 Review Automatic Modification Error Status**

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can review the CS Request in Automatic Modification Error status and determine whether to transition the CS Request to the following statuses:

- Automatic Modification
- Wait for Modification /Withdrawal Requests
- Cancel

**2.72 Request Transition to Automatic Modification Status**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Automatic Modification Error status, the CSR or Authorized User can request to transition the CS Request to Automatic Modification status.

**2.73 Request Transition to Wait for Modification/Withdrawal Requests**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Automatic Modification Error status for a modification to the CS Request, the CSR or Authorized User can request to transition the CS Request to Wait for Modification/Withdrawal Requests status.

**2.74 Request Transition to Cancel CS Request**

**Actor/Role:** CSR or Authorized User

**Description:**

While the CS Request is in Automatic Modification Error status, the CSR or Authorized User can request to transition the CS Request to Cancelled status.

**2.75 Review CS Request Related Entities**

**Actor/Role:** CSR or Authorized User

**Description:**

### 3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

The CSR or Authorized User must review the CS Request Related Entities when the CS Request has been cancelled

#### 2.76 Request Discard CS Request Person(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Person(s).

#### 2.77 3.3.1.1a C2M Establish Person and/or Account for Customer Service Request

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '3.3.1.1a C2M Establish Person and/or Account' process.

#### 2.78 Request Discard CS Request Account(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Account(s).

#### 2.79 3.3.1.1a C2M Establish Person and/or Account for Customer Service Request

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '3.3.1.1a C2M Establish Person and/or Account' process.

#### 2.80 Request Discard CS Request Premise(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Premise(s).

#### 2.81 5.1.5.1a C2M.Manage Metered Site

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '5.1.5.1a C2M.Manage Metered Site' process.

#### 2.82 Request Discard CS Request Contract(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Contract(s).

#### 2.83 5.1.5.1a C2M.Manage Metered Site

**Actor/Role:** CSR or Authorized User

**Description:**

### 3.3.2.1a C2M.v2.7.CCB.Start Premise Based Service using a Customer Service Request

Refer to '5.1.5.1a C2M.Manage Metered Site' process.

#### 2.84 Request Discard CS Request Product(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Contract Product(s).

#### 2.85 3.3.2.5 C2M.Maintain Consumer Contracts

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '3.3.2.5 C2M.Maintain Consumer Contracts' process.

#### 2.86 Request Discard CS Request Service Location(s)

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User can request to discard the CS Request Service Location(s).

#### 2.87 5.1.5.1a C2M.Manage Metered Site

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '5.1.5.1a C2M.Manage Metered Site' process.

#### 2.88 3.4.1.1 C2M.Manage Customer Contacts

**Actor/Role:** CSR or Authorized User

**Description:**

Refer to '3.4.1.1 C2M.Manage Customer Contacts' process.

### Test Documentation related to the Current Process

| ID | Document Name | Test Type |
|----|---------------|-----------|
|    |               |           |
|    |               |           |
|    |               |           |

## Document Control

### Change Record

| Date        | Author          | Version       | Change Reference                                    |
|-------------|-----------------|---------------|---|
| 06/15/'2020 | Jeremy Quan     | Initial Draft |   |
| 06/25/2020  | Angus MacKenzie |               | Review, comments                                    |
| 07/07/2020  | Jeremy Quan     |               | Updates applied. Implemented latest recommendations |
| 08/04/2020  | Galina Polonsky |               | Minor updates, Reviewed, Approved                   |
|             |                 |               |   |
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## Attachments

### Customer Service Request: