

C2M.v2.7.CCB

3.3.2.2 Start Non-Premise Based Service

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Contents

BRIEF DESCRIPTION	4
BUSINESS PROCESS MODEL PAGE 1	5
BUSINESS PROCESS MODEL PAGE 2	6
DETAIL BUSINESS PROCESS MODEL DESCRIPTION.....	7
TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS	20
DOCUMENT CONTROL	21
ATTACHMENTS	22
<i>Start/Stop – Pending Start</i>	22
<i>Service Agreement Active</i>	22
<i>Service Agreement Pending Start</i>	22
<i>Control Central Search</i>	22
<i>Dashboard Alert – Pending Start</i>	22
<i>Standard Non-Premise Based SA Types</i>	22
<i>Admin Menu/Installation Options/Control Central Alerts</i>	23
<i>Account Financial History</i>	23

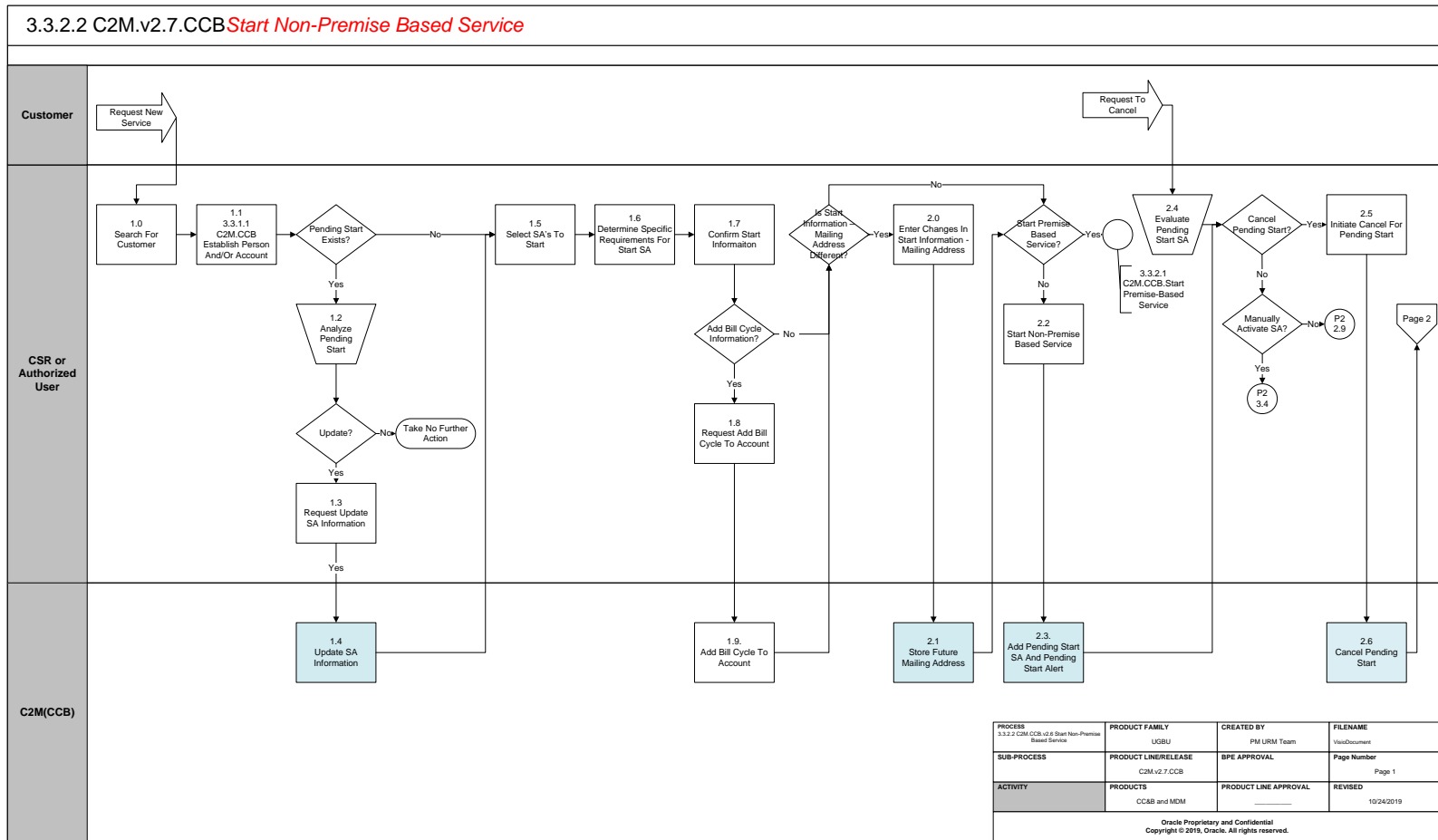
Brief Description

Business Process:	3.3.2.2 C2M.CCB.Start Non-Premise Based Service
Process Type:	Sub-Process
Parent Process:	3.3.2 C2M.CCB.Manage Service Agreement
Sibling Processes:	3.3.2.1 C2M.CCB.Start Premise Based Services, 3.3.2.3 C2M.CCB.Stop Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non-Premise Based Service, 3.3.3.2 C2M.CCB Determine Customer Deposit, 3.3.1.1C2M (CCB 2.6). Establish Person and/or Account, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 5.3.1 C2M.CCB.Manage Fieldwork, 4.2.2 C2M.CCB.Manage Billing, 4.3.1.1 C2M.CCB.Manage Payments, 4.3.2.1 C2M.CCB.Manage Collection Process

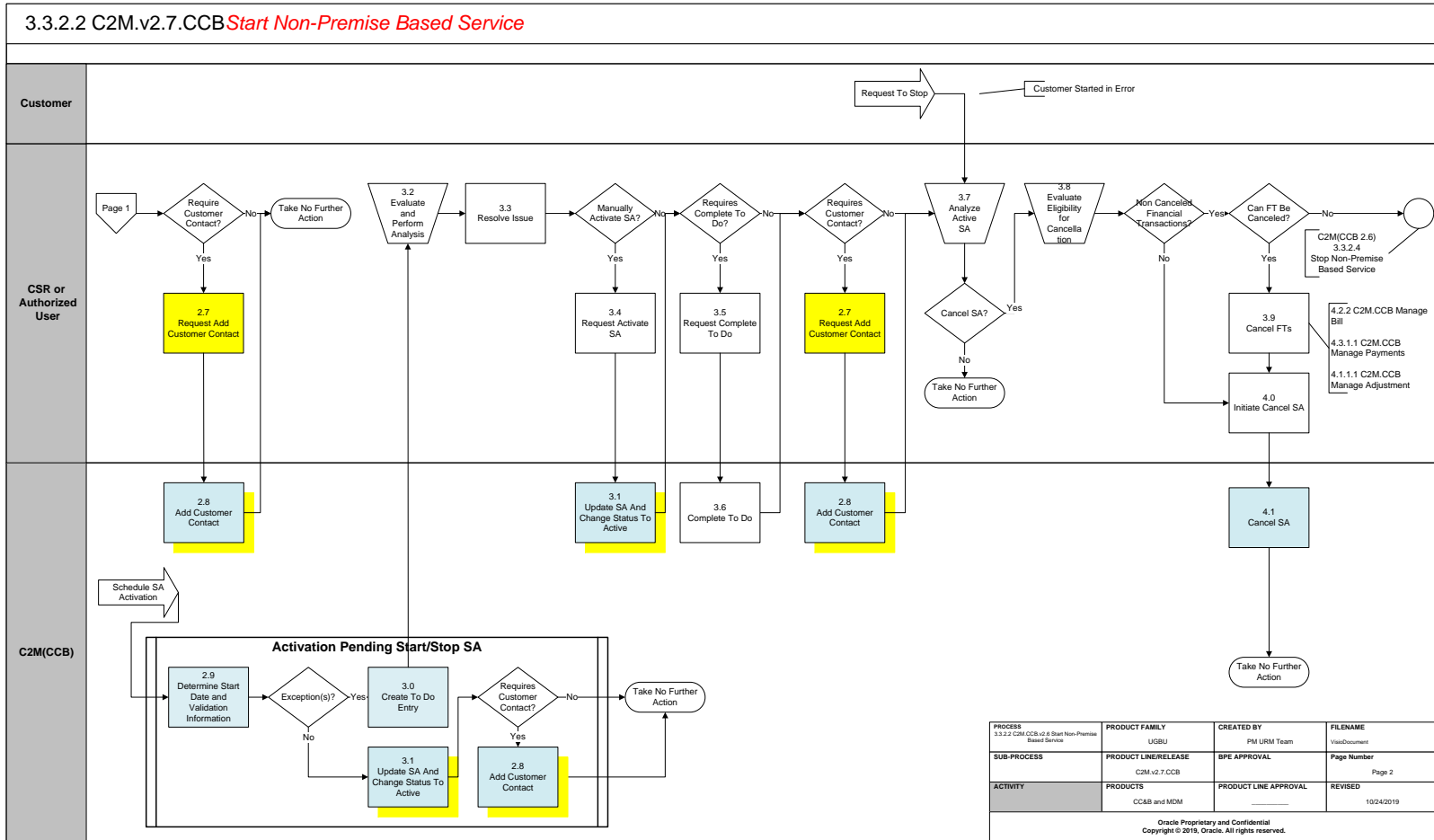
This process describes the typical Start Service processing for Non-Premise Based [Service Agreements](#). After receiving a Customer request to Start Service and 3.3.1.1 C2M.CCB.Establishing Person and/or Account, a Service Agreement(s) that establishes a relationship between the Service Provider and Customer is created. Customer requests to Start Non-Premise Based Service are obtained from various sources. Start service may be for:

- Customer, new or existing and may be combined with Starting a Premise Based Service.
- Charges for a one-time service delivered by the Company
- Charges for damages to Company property
- Charitable contribution
- Connection Charge

Business Process Model Page 1



Business Process Model Page 2



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR

Description:

Upon receipt of request for service the CSR or Authorized User accesses [Control Central Search](#) to locate the Customer. When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central – Account Information refreshed with the selected customer’s data. [Dashboard Alerts](#) provide the CSR or Authorized User with pertinent information for the customer including Pending Starts.

Process Plug-in enabled Y

Available Algorithm(s):

Installation Options – Control Central Alert Algorithms
CI_GLBL-CTXT - Global Context

Configuration required Y

Entities to Configure:

Zones
Installation Options
Installation Options-Framework
Identifier Type
Geographic Type

1.1 3.3.1.1 Establish Person and/or Account

Actor/Role: CSR or Authorized User

Description:

Refer to process 3.3.1.1 C2M.CCB.Establish Person and or Account Process. In this process, Person and or Account information is established or updated is added in CCB and Contact information added or updated in MDM.

1.2 Analyze Pending Start

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews the existing [Pending Start](#) to determine if updates are required.

1.3 Request Update SA Information

Actor/Role: CSR or Authorized User

Description:

A start date or other [Service Agreement](#) Information may need to be changed. The CSR or Authorized User enters the changes.

1.4 Update SA Information

Actor/Role: C2M.CCB

Description:

Application applies required changes to Service Agreement.

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

C2MSAI-INFO- This Installation Option algorithm type formats the "SA Information" that appears throughout the system.
C2M-SAT-INFO- This SA Type algorithm type formats the "SA Information" that appears throughout the system.

Configuration required Y

Entities to Configure:

Installation Options -Framework
SA Type
SA Type SA Rel Type
SA Relationship Type
SA Type Start Option

Business Object Y

Business Object:

WX-ServiceAgreement - Service Agreement
C1-AccountManagementSA - Service Agreement - Account Management
C1-SABasic - Service Agreement Basic
C1-ServiceAgreement - Service Agreement
WX-SAType - Service Agreement Type
CI_SAInfo - SA Information
X1-SATypeCharacteristic - Maps SA Type characteristics
C1-SATypeStartOptionPhysicalBO - Physical BO for SA Type Start Option
C1-SACreationRule - SA Creation Rule Publish
C1-SACreationRuleTaskType - SA Creation Rule Task Type
C1-SARelationship - SA Relationship BO

C1-SAServiceTaskDetails - SA Service Task Details BO
C1-SATypeBasic - SA Type Basic
CI_SAType - SA Type
CI_SATypeStartOptionRequired - SA Type Start Option Required
C1-SAContractDetails - Service Agreement Contract Details

1.5 Select SA's to Start

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User gathers information from the customer to initiate the [Start Service](#) process. This is used to enter SA start date to confirm a start method of "Start SA" and to choose the appropriate CIS Division and SA Type.

Configuration required Y

Entities to Configure:

SA Type
SA Start Options
SA Type SA Rel Type
SA Relationship Type

Business Object Y

Business Object:

WX-ServiceAgreement - Service Agreement
C1-AccountManagementSA - Service Agreement - Account Management
C1-SABasic - Service Agreement Basic
C1-ServiceAgreement - Service Agreement
WX-SAType - Service Agreement Type
CI_SAInfo - SA Information
X1-SATypeCharacteristic - Maps SA Type characteristics
C1-SATypeStartOptionPhysicalBO - Physical BO for SA Type Start Option
C1-SACreationRule - SA Creation Rule Publish
C1-SACreationRuleTaskType - SA Creation Rule Task Type
C1-SARelationship - SA Relationship BO

C1-SAServiceTaskDetails - SA Service Task Details BO
C1-SATypeBasic - SA Type Basic
CI_SAType - SA Type Basic
CI_SATypeStartOptionRequired - SA Type Start Option Required
C1-SAContractDetails - Service Agreement Contract Details

1.6 Determine Specific Requirements for Start SA

Actor/Role: CSR or Authorized User

Description:

There may be different start options configured for the specific SA Type. The service may be for a one-time charge, a recurring amount for the life of the Service Agreement, a recurring charge until total amount has billed, or payoff amount is satisfied. SA type, Start Option, Amount and Installment Payment or recurring charge field information may need to be populated or changed using available lookups. Based on configuration the CSR or Authorized User may determine selections for but not limited to:

- Different Connection Fees
- Specific Predetermined One Time Charges for Service outside of normal business operations
- Loan Periods and Loan Amounts
- Installment Periods and Amounts

Process Plug-in enabled Y

Available Algorithm(s):

C2MSAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
C2M-SAT-INFO - This SA Type SA Information algorithm formats the "SA Information" that appears throughout the system.

SA Type
SA Type Start Options
Rate Schedule
Contract Quantity Type
Contract Options Type
Contract Option Event Type
To Do Type

To Do Role
Adjustment Type
Currency
Billable Charge Template
Bill Factor
Characteristic Type
Interval Profile Rel type
TOU Map Relationship Type
TOU Group
Terms and Conditions

Business Object Y

Business Object:

ServiceAgreement - Service Agreement
WX-ServiceAgreement - Service Agreement
C1-SABasic - Service Agreement Basic
C1-SATypeStartOptionPhysicalBO - Physical BO for SA Type Start Option
CI_SAInfo - SA Information
SARelationship - Service Agreement Relationship
CI_SATypeStartOptionRequires - SA Type Start Option Required

1.7 Confirm Start Information

Actor/Role: CSR or Authorized User

Description:

There is dialogue with the Customer. Start Information is confirmed including the mailing address.

1.8 Request Add Bill Cycle to Account

Actor/Role: CSR or Authorized User

Description:

In the application, the Bill Cycle normally reflects the service point’s Meter Read Cycle when there is an associated Premise Based Service Agreement. When a Premise Based Service Agreement is not associated, a Bill Cycle must be manually assigned to the Account. The CSR determines and assigns the Bill Cycle based on established business rules.

Configuration required Y

Entities to Configure:

Bill Cycles

1.9 Add Bill Cycle to Account**Actor/Role:** C2M(CCB)**Description:**

The Bill Cycle is added to the Account. Refer to 4.2.2.1 C2M.CCB.Update Billing Information.

Configuration required Y**Entities to Configure:**

Bill Cycles

2.0 Enter Changes in Start Information - Mailing Address**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User makes any necessary changes for contact information and enters new mailing address. The system defaults to mailing premise. If no other Premise Based Service Agreements exist, the default needs to change. The application's address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is activated. (Alternatively, the CSR or Authorized User may return to the Person Record if changes are to occur immediately).

Configuration required Y**Entities to Configure:**

Postal Code Default
Installation Options
Bill Route Type
Country
Feature Configuration - Allow Address Validation
Feature Configuration - Address Validation Script

2.1 Store Future Mailing Address**Actor/Role:** C2M (CCB)**Description:**

The mailing address information is stored until the [Service Agreement](#) is activated.

2.2 Start Non-Premise Based Service**Actor/Role:** CSR or Authorized User**Description:**

Once all SA start information is confirmed the CSR or Authorized User will start an SA either manually or via a start option.

2.3 Add Pending Start SA and Pending Start Alert**Actor/Role:** C2M(CCB)**Description:**

The application creates a Service Agreement in Pending Start status. Selected Information from the start options and other SA Type defined configuration populate the Pending Start Service Agreement. The SA Type algorithm, **SACR-AT**, SA Activation may also be used to activate Non-Premise based Service Agreements. If this algorithm is not plugged in on a SA Type, Service Agreements are activated by this SA Activation background process or manually activated.

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

NEW SA TODO - This SA creation algorithm creates a To Do entry when SA is created
C2MSAI-INFO - This Installation Option algorithm type formats the "SA Information" that appears throughout the system.
C2M-SAT-INFO - This SA Type algorithm type formats the "SA Information" that appears throughout the system.
Installation Options - Control Central Alert Algorithms - C1_PENDST-DF - Highlight Pending Start SA's
SACR-AT - This SA creation algorithm activates a pending start SA.

Configuration required Y **Entities to Configure:**

To Do Type
To Do Role
Installation Options
SA Type

[2.4 Evaluate Pending Start Service Agreement](#)

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews the Pending Start [Service Agreement](#). Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The Customer may call and request they do not want to Start Service.

[2.5 Initiate Cancel for Pending Start](#)

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User cancels the Pending Start Service Agreement.

2.6 Cancel Pending Start**Actor/Role:** C2M (CCB)**Description:**

The Pending Start [Service Agreement](#) status is transitioned to Canceled in the application.

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

CI_SACA-CRTD - This SA Cancel algorithm a To Do entry using the To Do Type and To Do Role (if specified) when a service agreement is canceled.
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Configuration required Y**Entities to Configure:**

SA Type
To Do Type
To Do Role

2.7 Request Add Customer Contact**Actor/Role:** CSR or Authorized User**Description:**

Based on established business rules the CSR or Authorized User creates a Customer Contact for the customer, recording pertinent information about the change(s) for the Service Agreement.

Configuration required Y**Entities to Configure:**

Customer Contact Class
Customer Contact Type

2.8 Add Customer Contact Group: Activation Pending Start/Stop SA**Actor/Role:** C2M (CCB)**Description:**

The CSR or Authorized User can create a Customer Contact online based on established business rules. The Customer Contact is added in the application. The application creates a Dashboard Alert for the Customer Contact information and displays the last contact in the Dashboard Alert Zone. Refer to process 3.4.1.1 C2M.CCB.Manage Customer Contacts.

C2M-SAAT-NBB-SA Activation - this algorithm creates a customer contact of the specified Customer
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Process Plug-in enabled Y	Available Algorithm(s):	Contact Class and Customer Contact Type when the service agreement is activated.
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Configuration required Y	Entities to Configure:	SA Type
		Installation Options
		Customer Contact Class
		Customer Contact Type

2.9 Determine Start Date and Validation Information Group: Activation Pending Start/Stop SA

Actor/Role: C2M(CCB)

Description:

The background process, **Service Agreement Activation, SAACT**, periodically checks to see if [Service Agreements](#) can be activated. If the Service Agreement's effective start date less than the current business date then a SA is available for activation, otherwise SA is ignored until the next check period. If an SA is available for activation, the application will validate all the SA start information and creates an exception processing record for each Service Agreement with missing or incomplete information. If SA information is complete and correct, the application will progress the SA to Active

Customizable process N	Process Name:	SAACT - The service agreement activation process updates pending start and pending stop service agreements
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Configuration required Y	Entities to Configure:	SA Type
		To Do Type
		To Do Role

3.0 Create To Do Entry Group: Activation Pending Start/Stop SA

Actor/Role: C2M (CCB)

Description:

If configured, a background process creates To Do Entries for exception processing. The exception is also available for viewing and resolution on a separate page in the application.

Process Plug-in enabled Y	Available Algorithm(s):	C1-ADJAREQEM - Create Email For Adjustment Approval
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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.

Customizable process N Process Name:

TD-SSFTL To Do for Old Pending Start/Stops- catches start/stop requests that have gone unfulfilled.

Configuration required Y Entities to Configure:

To Do Types
To Do Roles

3.1 Update SA and Change Status to Active Group: Activation Pending Start/Stop SA

Actor/Role: C2M(CCB)

Description:

Once information is available or obtained, the Service Agreement Activation process, SA Activation will transition the [Service Agreement](#) to active. Based on configuration, some Service Agreements are automatically transitioned from Pending Start to Stopped.

Process Plug-in enabled Y	Available Algorithm(s):	SAAT-CC - This SA Activation Algorithm Type creates a customer contact of the specified Customer Contact Class and Customer Contact Type when the service agreement is activated
		CL_ASSIGNNBC - This SA Activation algorithm assigns a bill cycle to an account if that account does not have a bill cycle

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

3.2 Evaluate and Perform Analysis

Actor/Role: CSR or Authorized User

Description:

Based on established business rules the CSR or Authorized User investigates viable solutions or workarounds for the missing or incomplete information. This may require further investigation to provide necessary information. The CSR or Authorized User enters this information in the application.

Configuration required Y	Entities to Configure:	To Do Type
		To Do Role

3.4 Request Activate SA

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User manually activates the SA in the application.

3.5 Request Complete To Do

Actor/Role: CSR or Authorized User

Description:

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

Configuration required Y Entities to Configure:

To Do Role
To Do Type

3.6 Complete To Do Entry

Actor/Role: C2M (CCB)

Description:

The To Do Entry is updated to Complete status in the application.

Configuration required Y Entities to Configure:

To Do Role
To Do Type

3.7 Analyze Active SA

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User may review the Active [Service Agreement](#). Information is made available that requires further evaluation. The Service Agreement may need to be canceled. The customer may also call and indicate they do not want the service provided. This request may be submitted after the Service Agreement is activated.

3.8 Evaluate Eligibility for Cancellation

Actor/Role: CSR or Authorized User

Description:

As part of the cancellation process it is determined there are [financial transactions](#) associated with the Active Service Agreement.

3.9 Cancel FTs

Actor/Role: CSR or Authorized User

Description:

Refer to 4.2.2 C2M.CCB.Manage Bill, 4.3.1.1 C2M.CCB.Manage Payments and 4.1.1.1 C2M.CCB.Manage Adjustment for Financial Transaction Cancellations.

Configuration required Y Entities to Configure:

Cancel Reason – for Bill, Payment or Adjustment

4.0 Initiate Cancel SA

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User changes the [Service Agreement](#) status to Canceled.

4.1 Cancel SA

Actor/Role: C2M(CCB)

Description:

The Service Agreement is transitioned to a Canceled status. Canceled is a final status.

Process Plug-in enabled Y	Available Algorithm(s):	C2M-SACA-CRT- This Algorithm Type creates a To Do Entry when SA Canceled
Configuration required Y	Entities to Configure:	To Do Type To Do Role

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
2/24/09	Colleen King	Draft 1a	No Previous Document
3/8/2009	Colleen King	Multiple	Multiple Revisions
8/13/09	Colleen King		After Review
10/20/10	Geir Hedman		Update Title and Content page
11/02/10	Yoko Iwahiro		Update algorithms and business objects.
2/8/11	Geir Hedman		Updated Document and Visio
3/19/13	May Wang	V2. 1	Updated Document and Visio
5/10/2013	Galina Polonsky		Reviewed, Approved
July 10, 2017	Phillip Martin		C2M version created
09/14/2017	Ekta Dua		Updated format of Document and Visio
09/16/2017	Galina Polonsky		Reviewed, Approved
12/19/2017	Colleen King		Updates for Visio and Document
12/21/2017	Galina Polonsky		Reviewed, Approved
05/29/2019	Satya Kalavala		Updated Format for v2.7

Attachments

Start/Stop - Pending Start



Start Stop
Non-Premise Based S

Service Agreement Active



Non Premise Based
Service Agreement - /

Service Agreement Pending Start



Non Premise Based
Service Agreement - F

Control Central Search



"Control Central
Search.doc"

Dashboard Alert - Pending Start



Dashboard Pending
Start - Non-Premise B

Standard Non-Premise Based SA Types



"Standard
Non-Premise Based S

Admin Menu/Installation Options/Control Central Alerts



"Installation Options
Control Central Alert.

Account Financial History



Account Financial
History Non Premise I