3.3.2.3a Terminate Contracts and Stop Premise-Based Service
Brief Description

Business Process: 3.3.2.3a C2M.CCB.Terminate Contracts and Stop Premise-Based Service
Process Type: Sub-Process
Parent Process: 3.3.2 C2M.Manage Service Agreement and Contracts
Sibling Processes: 3.3.1.1.a C2M.CCB.Establish Person and/or Account; 5.1.5.1a C2M.CCB.Manage Metered Site; 3.3.2.5 C2M.CCB.Manage Consumer Contracts; 3.4.1.1 C2M.Manage Customer Contacts

This business process takes place when customers contacts the service provider to terminate their service contract. An authorized user evaluates the customer’s request and initiates Customer Service Request to terminate their contract and stop services.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

Customer

- Request to Terminate Service

CBR or Authorized User

2.0 Create CS Request Type

2.1 Select CS Request Termination Type

2.2 Request Add CS Request Termination Contract

2.3 Search for Person and Populate Mailing Address

2.4 Request CS Request with Draft Status

2.5 Search for Account and Populate Mailing Address

2.6 Create CS Request and Populate Mailing Address

2.7 Search for Account and Populate Mailing Address

2.8 Create CS Request for Account

2.9 Create CS Request for Account and Update Bill Address Source

C2M (CCB)

3.0 Create CS Request to Terminate Contract in Initial Draft Status

3.1 Update Person and Account

3.2 Populate Consumer Type and Consumer Contract

3.3 Request Add CS Request Contract

3.4 Request Add CS Request Contract in Pending Status

3.5 Select Related Product and Populate Action Date

3.6 Request Add CS Request Contract Product

3.7 Create CS Contract Product Request in Pending Status

3.8 Review CS Request for Service Location Action

3.9 Search and Determine the Unique Market Identifier

4.0 Populate Contract Information, Market and Request to Stop

4.1 Request Add CS Request Service Location

4.2 Review CS Request in Draft Status

4.3 Request Transition to Expire CS Request

4.4 Transition CS Request to Expire

Yes

No

EXPRIE CS REQUEST?
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

**Business Process Model  Page 5**

3.3.2.3a C2M.CCB Terminate Contracts and Stop Premise-Based Service

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**CSR or Authorized User**

**C2M (CCB)**

<table>
<thead>
<tr>
<th>PROCESS ACTIVITY</th>
<th>SUB-PROCESS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activation Setup</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Create Adjustment</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Stop Service Agreement</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transition CS Request Service Location Actions</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Initiate Service Location Actions</strong></td>
<td></td>
</tr>
</tbody>
</table>

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**FILE NAME:** CCS.C2M.v2.7.CCB.Terminate Contracts and Stop Premise Based Service (1).docx

**PAGE 2**

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3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

Business Process Model  Page 6

Diagram of the Business Process Model for Terminate Contracts and Stop Premise-Based Service.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

Business Process Model  Page 8
3.3.2.3a C2M.CCB Terminate Contracts and Stop Premise-Based Service

Business Process Model  Page 11

[Diagram of the process model showing steps and decision points for terminating contracts and stopping premise-based service]
Detail Business Process Model Description

1.1 Provide Consumer Contract and Product(s) and Termination Date
Actor/Role: Customer or 3rd Party Application User
Description:
The Customer or a 3rd Party Application User will provide the Consumer Contract and Product(s) and Termination Date to request to terminate service.

1.2 Request to Terminate Service with Selected Product
Actor/Role: Customer or 3rd Party Application User
Description:
The Customer or a 3rd Party Application User will request to terminate service for the selected product.

1.3 Request Create and Activate CS Request
Actor/Role: 3rd Party Application
Description:
The 3rd Party Application will trigger to create a CS Request.

1.4 REST Adapter Request
Actor/Role: Oracle Cloud Integration
Description:
The Oracle Cloud Integration will capture the CS Request and pass it to the C2M system.

1.5 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).

Available Plug-In(s)  
| C1-AddCoChRe - Add Contract Change Request |

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

Entities to Configure:  
| Customer Service Request Type |

1.6 REST Adapter Response
Actor/Role: Oracle Cloud Integration
Description:
The Oracle Cloud Integration will respond with the information of the newly created CS Request.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

1.7 Notify Customer Terminate Service Application Status
Actor/Role: 3rd Party Application
Description:
The 3rd Party Application will notify the Customer or the Application User about the newly created CS Request.

1.8 Receive Notification
Actor/Role: Customer or 3rd Party Application User
Description:
The Customer or a 3rd Party Application User will receive notification about the successful creation of a CS Request.

1.9 Evaluate Consumer Contract and Active Product(s)
Actor/Role: CSR or Authorized User
Description:
A CSR or Authorized User receives a request to terminate a Consumer Contract. The user searches for the Consumer Contract using any of the person attributes on the Consumer Contract Query page and notes the Consumer Contract ID, Premise ID, Service Point, and Registration Point. (The Service Point can be derived from the Premise.)

2.0 Select CS Request Type
Actor/Role: CSR or Authorized User
Description:
A CSR or Authorized user will select the appropriate Customer Service Request Type to terminate the Consumer contract using the Select Customer Service Request Type page.

2.1 Populate Termination Date and Other Required Data
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user will use the Customer Service Request - Terminate Contract page to populate the Termination Date, Waive Exit Fee and Customer Service Request Error Handling.

2.2 Request Add CS Request to Terminate Contract
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user clicks the Save button on the Customer Service Request - Terminate Contract page.

2.3 Create CS Request to Terminate Contract in Draft Status
Actor/Role: C2M(CCB)
Description:
C2M(CCB) creates the Customer Service Request in Draft status. This request will be used to orchestrate the termination of the Consumer Contract and the update of the Mailing address (if required).
2.4 Review CS Request in Initial Draft Status
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user will verify the initial Customer Service Request information and whether the customer’s Mailing Address needs to be changed.

2.5 Search for Person and Populate Mailing Address
Actor/Role: CSR or Authorized User
Description:
If a customer’s Mailing Address needs to be changed to the Person address, a CSR or Authorized user will use the Contract Change Request Person page to search for the person and populate the new mailing address.

2.6 Create CS Request Person to Update Address
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user clicks the Save button on the Contract Change Request Person page.

2.7 Search for Account and Populate Bill Address Source
Actor/Role: CSR or Authorized User
Description:
If a customer’s Mailing Address needs to be changed to the Person address, a CSR or Authorized user will use the Contract Change Request Account page to search for the account and populate the bill address source.

2.8 Create CS Request Account to Update Bill Address Source to Person
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user clicks the Save button on the Contract Change Request Account page.

2.9 Search for Account and Populate Mailing Address and Bill Address Source
Actor/Role: CSR or Authorized User
Description:
If a customer’s Mailing Address needs to be changed to the Account Override address, a CSR or Authorized user will use the Contract Change Request Account page to search for the account and populate the mailing address and the bill address source.
3.0 Create CS Request Account to Update Address and Bill Address Source to Account Override
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user clicks the Save button on the Contract Change Request Account page.

3.1 Update Person and/or Account
Actor/Role: CSR or Authorized User
Description:
Refer to 3.3.1.1a C2M.Establish Person and/or Account for details on updating the Person and/or Account.

3.2 Populate Consumer Contract Type and Consumer Contract
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user will use the Contract Change Request Contract page to select the Consumer Contract Type and populate the Consumer Contract ID to be terminated.

3.3 Request Add CS Request Contract
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user clicks the Save button on the Contract Change Request Contract page.

3.4 Create CS Request Contract in Pending Status
Actor/Role: C2M(CCB)
Description:
C2M(CCB) creates the Customer Service Request Contract business object in Pending status.

### Available Plug-In(s)

| C1-TRACONCRQ - Process Customer Service Request Contracts to Add/Update Contracts |

### Business Object

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

3.5 Select Related Product and Population Action Date
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized user queries the Consumer Contract Product using the Contract Change Request Contract Product page and then updates the Requested Action Date/Time.
3.6 Request Add CS Request Contract Product  
Actor/Role: CSR or Authorized User  
Description:  
The CSR or Authorized user clicks the Save button on the Contract Change Request Contract Product page.

3.7 Create CS Contract Product Request in Pending Status  
Actor/Role: C2M(CCB)  
Description:  
C2M(CCB) creates the Customer Service Request Contract Product business object in Pending status.

### Available Plug-In(s)

<table>
<thead>
<tr>
<th>Plug-In Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI-TRAPROCRQ - Process Customer Service Request Products to Add/Update Products</td>
<td></td>
</tr>
</tbody>
</table>

### Business Object

<table>
<thead>
<tr>
<th>Business Object Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI-ContractChangeReqCnProdRoot (Contract Change Request Contract Product Root)</td>
</tr>
<tr>
<td>CI-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

3.8 Review CS Request for Service Location Action  
Actor/Role: CSR or Authorized User  
Description:  
A CSR or Authorized user determines if the Market needs to be notified of the contract termination.

3.9 Search and Determine the Unique Market Identifier  
Actor/Role: CSR or Authorized User  
Description:  
A CSR or Authorized user will use the Consumer Contract Query page to search for the Consumer Contract and note the Registration Point ID and Market.

4.0 Populate Contract information, Market and Request to Stop  
Actor/Role: CSR or Authorized User  
Description:  
A CSR or Authorized User will use the Customer Service Request Service Location page to select the Market and CS Request Service Location Action, then uses the Contract Change Request Service Location page to populate the Service Point ID, Registration Point ID, Premise ID, and Consumer Contract ID.

4.1 Request Add CS Request Service Location  
Actor/Role: CSR or Authorized User  
Description:  
Refer to 5.1.5.1a C2M.Manage Metered Site for details on updating the Service Location.

4.2 Review CS Request in Draft Status  
Actor/Role: CSR or Authorized User
Description:
A 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/Contract/Contract Product and CS Request Service Location.

4.3 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.

4.4 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.

4.5 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.

4.6 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)
<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-CHGREQINF - Contract Change Request Information</td>
</tr>
<tr>
<td>C1-VALCHGREQ - Contract Change Request Root Validation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-ContractChangeRequest (Contract Change Request Root)</td>
</tr>
<tr>
<td>C1-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

4.7 Set Activation Date
Actor/Role: C2M(CCB)
Description:
The Activation Date will be set on the CS Request.

Available Plug-In(s)
<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-SETACTDT - Set Activation Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-ContractChangeRequest (Contract Change Request Root)</td>
</tr>
<tr>
<td>C1-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>
4.8 Process CS Request Person
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.

Available Plug-In(s)

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-TRAPERCRQ - Process Customer Service Request persons to Add/Update Persons</td>
</tr>
</tbody>
</table>

4.9 Process CS Request Account
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.

Available Plug-In(s)

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-TRACTACCCRQ - Process Customer Service Request Accounts to Add/Update Account</td>
</tr>
</tbody>
</table>

5.0 Process CS Request Contract
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.

Available Plug-In(s)

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-TRACONCRQ - Process Customer Service Request Contracts to Add/Update Contracts</td>
</tr>
</tbody>
</table>

3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

5.1 Process CS Request Contract Product
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.

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

Business Object
- C1-ContractChangeReqCnProdRoot (Contract Change Request Contract Product Root)
- C1-ChangeContChangeRequest (Change Contract)

5.2 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.

5.3 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.

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)

5.4 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.

5.5 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.
5.6 Transition CS Request to Activation Setup Status  
Actor/Role: C2M(CCB)  
Description:  
The CS Request is transitioned to the Activation Setup status.

5.7 Review CS Request in 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

5.8 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.

5.9 Request Transition to Wait for Other CS Requests Status  
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.

6.0 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.

6.1 Transition CS Request to Opting Out Status  
Actor/Role: C2M(CCB)  
Description:  
The CS Request will transition to Opting Out status.

6.2 Opt out of Alteration  
Actor/Role: C2M(CCB)  
Description:
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

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

<table>
<thead>
<tr>
<th>Available Plug-In(s)</th>
<th>C1-OPTOUT - Opting Out of Alteration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Object</td>
<td>C1-ContractChangeRequest (Contract Change Request Root)</td>
</tr>
<tr>
<td></td>
<td>C1-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

6.3 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.

6.4 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.

6.5 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.

6.6 Transition CS Request to Cancelled Status
Actor/Role: C2M(CCB)
Description:
The CS Request will transition to Cancelled status.

6.7 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

6.8 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.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

6.9 Transition CS Request to Opted Out Status
Actor/Role: C2M(CCB)
Description:
The CS Request will transition to Opted Out status.

7.0 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.

7.1 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)

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-CHKCOOLOF Check CS Request Cooling Off End Date/Time</td>
<td></td>
</tr>
<tr>
<td>C1-ContractChangeRequest (Contract Change Request Root)</td>
<td></td>
</tr>
<tr>
<td>C1-ChangeContChangeRequest (Change Contract)</td>
<td></td>
</tr>
</tbody>
</table>

7.2 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

7.3 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.
7.4 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.

7.5 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.

7.6 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.

7.7 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.

Available Plug-In(s)
- F1-AT-RQ - Transition to Default Next Status (Script)

Business Object
- CI-ContractChangeRequest (Contract Change Request Root)
- CI-ChangeContChangeRequest (Change Contract)

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

7.8 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
### 7.9 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.

### 8.0 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.

### 8.1 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.

### 8.2 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

### 8.3 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
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

**Business Object**

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

**Entities to Configure:**

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

---

**8.4 Create Adjustment**

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

**Description:**

If the ‘On Activation – Remove’ contract rule for the creation of an Adjustment is configured and the CS request’s Waive Exit Fee is not checked, an Adjustment will be created. Refer to 4.1.1.1 C2M.CCB.Manage Adjustment and Adjustment Approval process for more details.

**Available Plug-In(s)**

| CI-EXTFEEADJ - Apply Contract Rule - Add Early Exit Fee Adjustment |

---

**Business Object**

| CI-CCRuleAddEarlyExitFeeAdjmt (Add Early Exit Fee Adjustment) |
| CI-ConsumerContractRule (Consumer Contract Rule) |
| CI-ContractChangeRequest (Contract Change Request Root) |
| CI-ChangeContChangeRequest (Change Contract) |

**Entities to Configure:**

| Service Agreement |
| Adjustment Type |
| Consumer Contract Rule |
| Consumer Contract Product |
| Consumer Contract Product Component |

---

**8.5 Stop Service Agreement on the Requested Date**

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

**Description:**

If the ‘On Activation – Remove’ contract rule for stopping a Service Agreement is configured and a CS Request Service Location does not exist, the Service Agreement will be stopped on the requested date of the CS request.

**Available Plug-In(s)**

| CI-STCNCSA - Stop-Cancel Service Agreement for Contract Product |
8.6 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.

8.7 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)
CI-CSRERRTD - Create To Do for Customer Service Request

8.8 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.

8.9 Initiate CS Request Service Location Processing, Group: Perform CS Request Service Location Actions
Actor/Role: C2M(CCB)
Description:
The Initiate Service Location Actions status will try to start the processing for CS Request Service Location.
### 9.0 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.

### 9.1 Activate CS Request Service Location(s). Group: Perform CS Request Service Location Actions
**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.

### 9.2 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.

### 9.3 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)**
- CI-TRASLACRQ - Perform the related CS Request Service Locations Action

**Business Object**
- C1-CsrSvcLocMarketProcessRoot (Contract Service Location Market Process Root)
- C1-ContractChangeRequest (Contract Change Request Root)
- C1-ChangeContChangeRequest (Change Contract)
9.4 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.

9.5 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

9.6 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.

9.7 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.

9.8 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.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

9.9 Request Withdraw Service Location(s)
Actor/Role: C2M(CCB)
Description:
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.

10.0 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.

10.1 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.

10.2 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.

Available Plug-In(s)
- C1-NTUSRMDR - Notify User Modification is Required

Business Object
- C1-ContractChangeRequest (Contract Change Request Root)
- C1-ChangeContChangeRequest (Change Contract)

Entities to Configure:
- To Do Type
- To Do Role

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

10.3 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.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

10.4 Transition CS Request to Notify Customer Modification Required Status
Actor/Role: C2M(CCB)
Description:
The CS Request will transition to Notify Customer Modification Required status.

10.5 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.

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

10.6 Create Customer Contact
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 for more information.

10.7 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.
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

10.8 Transition CS Request to Manual Alteration Status
Actor/Role: C2M(CCB)
Description:
The CS Request will transition to Manual Alteration status.

Available Plug-In(s)

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI-RSTMODWT - Reset Modification Wait Details</td>
</tr>
<tr>
<td>CI-ConAltPre Basic Contract Alteration UI Map Pre-Processing</td>
</tr>
<tr>
<td>CI-CSRequestAlteration Customer Service Request Contract Product Details</td>
</tr>
<tr>
<td>CI-ConAltPos Basic Contract Alteration UI Map Post-Processing</td>
</tr>
</tbody>
</table>

10.9 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.

Available Plug-In(s)

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI-RSTMODWT - Reset Modification Wait Details</td>
</tr>
</tbody>
</table>

11.0 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.

11.1 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.
11.2 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.

**Available Plug-In(s):**  
- C1-APCRLCRPR - Apply Contract Rule Completion 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

**Background Process:**  
- F1-AT-RQ - Transition to Default Next Status (Script)

11.3 Create Adjustment  
**Actor/Role:** C2M(CCB)  
**Description:**  
If the ‘On Completion – Remove’ contract rule for the creation of an Adjustment is configured and the CS request’s Waive Exit Fee is not checked, an Adjustment will be created. Refer to 4.1.1.1 C2M.CCB.Manage Adjustment and Adjustment Approval process for more details.

**Available Plug-In(s):**  
- C1-EXTFEEADJ - Apply Contract Rule - Add Early Exit Fee Adjustment

**Business Object:**  
- C1-CCRuleAddEarlyExitFeeAdjmt (Add Early Exit Fee Adjustment)  
- C1-ConsumerContractRule (Consumer Contract Rule)  
- C1-ContractChangeRequest (Contract Change Request Root)  
- C1-ChangeContChangeRequest (Change Contract)

**Entities to Configure:**  
- Service Agreement  
- Adjustment Type  
- Consumer Contract Rule  
- Consumer Contract Product  
- Consumer Contract Product Component
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11.4 Send Request for Final Meter Read to MTM
Actor/Role: C2M(CCB)
Description:
The assumption is that if a Final Meter Read is required, a custom process will be developed to send a request for the final meter read to MTM.

11.5 Process and Send Market Message
Actor/Role: MTM or a Third Party Market Communication Application
Description:
The assumption is that MTM or a Third Party Market Communication Application processes market message(s)/ response.

11.6 Process Request and Send Response
Actor/Role: Market
Description:
The assumption is that MTM or a Third Party Market Communication Application processes market message(s)/ response.

11.7 4.2.1.1 C2M.MDM.Upload Device Measurements. Group: Create IMD
Actor/Role: C2M(CCB)
Description:
Once the Final Meter Read is received from MTM or a Third Party Market Communication Application, an IMD is created. Refer to 4.2.1.1 C2M.MDM.Upload Device Measurements process for more information.

11.8 4.2.1.2 C2M.MDM.Manage VEE and VEE Exceptions. Group: Create IMD
Actor/Role: C2M(CCB)
Description:
Once the Final Meter Read is received from MTM or a Third Party Market Communication Application and an IMD is created, the IMD will be subject to VEE. Refer to 4.2.1.2 C2M.MDM.Manage VEE and VEE Exceptions process for more information.

11.9 Stop Service Agreement on the Requested Date
Actor/Role: C2M(CCB)
Description:
If the ‘On Completion – Remove’ contract rule for stopping a Service Agreement is configured, the Service Agreement will be stopped on the requested date of the CS request.

Available Plug-In(s)

| C1-STNCPSA - Stop-Cancel Service Agreement for Contract Product |
| C1-StopCancelContractProductSA (Stop or Cancel Service Agreement for a Contract Product) |
| C1-ConsumerContractRule (Consumer Contract Rule) |
| C1-ContractChangeRequest (Contract Change Request Root) |
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

### Business Object

<table>
<thead>
<tr>
<th>Business Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

### Entities to Configure:

- Service Agreement
- Consumer Contract Rule
- Consumer Contract Product
- Consumer Contract Product Component

#### 12.0 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.

#### 12.1 Transition CS Request to Completed Status

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

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

#### 12.2 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)

<table>
<thead>
<tr>
<th>Available Plug-In(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-WTMDWTHRQ - Wait for Modification and Withdrawal Requests</td>
</tr>
</tbody>
</table>

### Business Object

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

### Background Process

<table>
<thead>
<tr>
<th>Background Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1-GEN-BOMON - Transition to Default Next Status (Script)</td>
</tr>
</tbody>
</table>

#### 12.3 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.
12.4 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

12.5 Request Transition to Automatic Modification
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User can bypass the modification wait period and request to transition the CS Request to Automatic Modification status.

12.6 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.

Available Plug-In(s)
- C1-MODCPAI - Modify Contract Products for action issues

Business Object
- C1-ContractChangeRequest (Contract Change Request Root)
- C1-ChangeContChangeRequest (Change Contract)

Background Process
- F1-AT-RQ - Transition to Default Next Status (Script)

12.7 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.

12.8 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.
12.9 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.

13.0 3.3.2.5 C2M.Maintain Consumer Contracts
Actor/Role: C2M(CCB)
Description:
Refer to 3.3.2.5 C2M.Maintain Consumer Contracts process.

13.1 Create CS Request Contract Product for New Eligible Contract Product
Actor/Role: CSR or Authorized User
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.

13.2 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.

13.3 Add Service Location
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.

13.4 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)

<table>
<thead>
<tr>
<th>Plug-In Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1-UPDATEALT</td>
<td>Update Customer Service Request Alteration Switch</td>
</tr>
<tr>
<td>C1-ConAltPre</td>
<td>Basic Contract Alteration UI Map Pre-Processing</td>
</tr>
<tr>
<td>C1-CSRequestAlteration</td>
<td>Customer Service Request Contract Product Details</td>
</tr>
<tr>
<td>C1-ConAltPos</td>
<td>Basic Contract Alteration UI Map Post-Processing</td>
</tr>
</tbody>
</table>
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

### Business Object

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<td>CI-ContractChangeRequest (Contract Change Request Root)</td>
</tr>
<tr>
<td>CI-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

#### 13.5 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)

<table>
<thead>
<tr>
<th>Available Plug-In(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1-TODOCOMPL - Generic To Do Completion</td>
</tr>
</tbody>
</table>

<table>
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<tr>
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<tbody>
<tr>
<td>CI-ContractChangeRequest (Contract Change Request Root)</td>
</tr>
<tr>
<td>CI-ChangeContChangeRequest (Change Contract)</td>
</tr>
</tbody>
</table>

#### 13.6 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.

#### 13.7 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.

#### 13.8 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.

#### 13.9 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.
14.0 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

14.1 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.

14.2 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.

14.3 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.

14.4 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.

14.5 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
14.6 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.

14.7 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.

14.8 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.

14.9 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

15.0 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.

15.1 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.

15.2 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.

15.3 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

15.4 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.

15.5 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.

15.6 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

15.7 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.

15.8 Request Transition to Wait for Modification/Withdrawal Requests
Actor/Role: CSR or Authorized User
Description:
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

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.

15.9 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.

16.0 Review CS Request Related Entities
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User must review the CS Request Related Entities when the CS Request has been cancelled

16.1 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).

16.2 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.

16.3 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).

16.4 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.

16.5 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).

16.6 5.1.5.1a C2M.Manage Metered Site
Actor/Role: CSR or Authorized User
Description:
3.3.2.3a C2M.CCB. Terminate Contracts and Stop Premise-Based Service

Refer to 5.1.5.1a C2M.Manage Metered Site process.

16.7 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).

16.8 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.

16.9 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).

17.0 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.

17.1 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

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### Document Control

#### Change Record

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<th>Author</th>
<th>Version</th>
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<td>07/30/2020</td>
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<td>Galina Polonsky</td>
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Attachments

Consumer Contract Query Page:

Select Customer Service Request Type Page:

Customer Service Request - Terminate Contract Page:

Contract Change Request Person Page:

Contract Change Request Account Page:

Account source is Person:
Account source is Account Override:

**Contract Change Request Contract Page:**

**Contract Change Request Contract Product Page:**

**Customer Service Request Service Location Page:**

**Contract Change Request Service Location Page:**