C2M.v2.7.CCB

3.3.2.4 Stop Non-Premise Based Service

Creation Date: July 18, 2017

Last Updated: February 11, 2020

ORACLE

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Brief Description

Business Process: **3.3.2.3 C2M.CCB.Stop 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, 3.3.2.2 C2M.CCB.Start Non-Premise Based Service, 3.3.3.2 C2M.CCB.Determine Customer Deposit, 3.3.1.1 C2M.CCB.Establish Person and or Account, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 5.3.2 C2M.CCB.Manage Fieldworks), 4.2.2 C2M.CCB.Manage Bill, 4.3.1.1C2M.CCB.Manage Payments, 4.1.1.1 C2M.CCB.Manage Adjustment, 4.3.2.1 C2M.CCB.Manage Collection Process**

This process describes the typical Stop Service processing for Non Premise Based Service Agreements. In Stop Service process the relationship between the Service Provider and Customer is terminated. There is an effective end date for the Service Agreement. The Service Agreement Type may be configured for the lifecycle to transition automatically to Stopped. An example of this is the One Time Charge.

The request for Stop Service could be for example:

- One time Charge
- Completion of Merchandise Installments
- Completion of Charitable Contribution
- C2M(CCB)'s Auto-Stop of Non-Premise based Services configuration

Standard Available C2M(CCB) Base Package Non Premise Based Service Agreement Types

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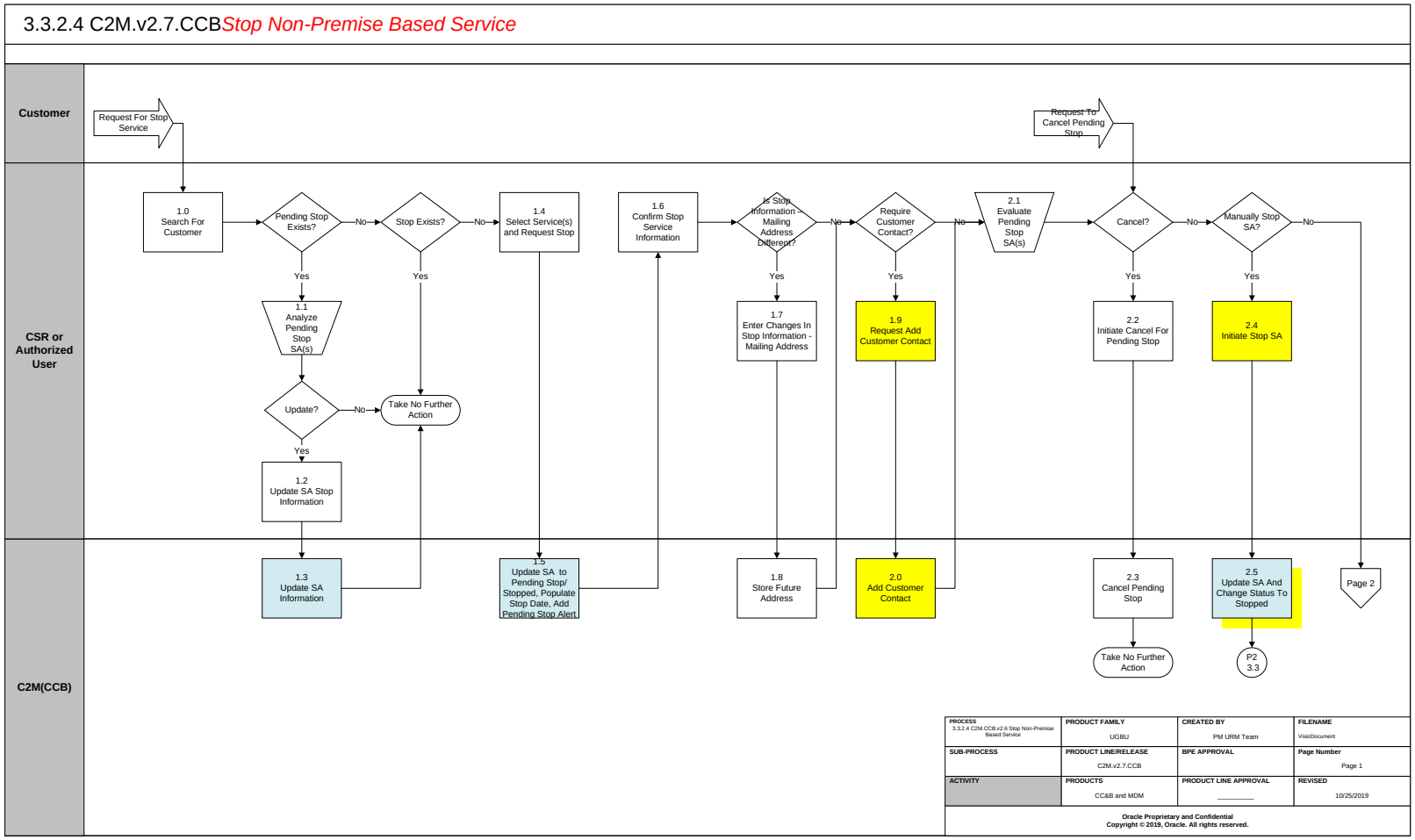
Business Process Model Page 1



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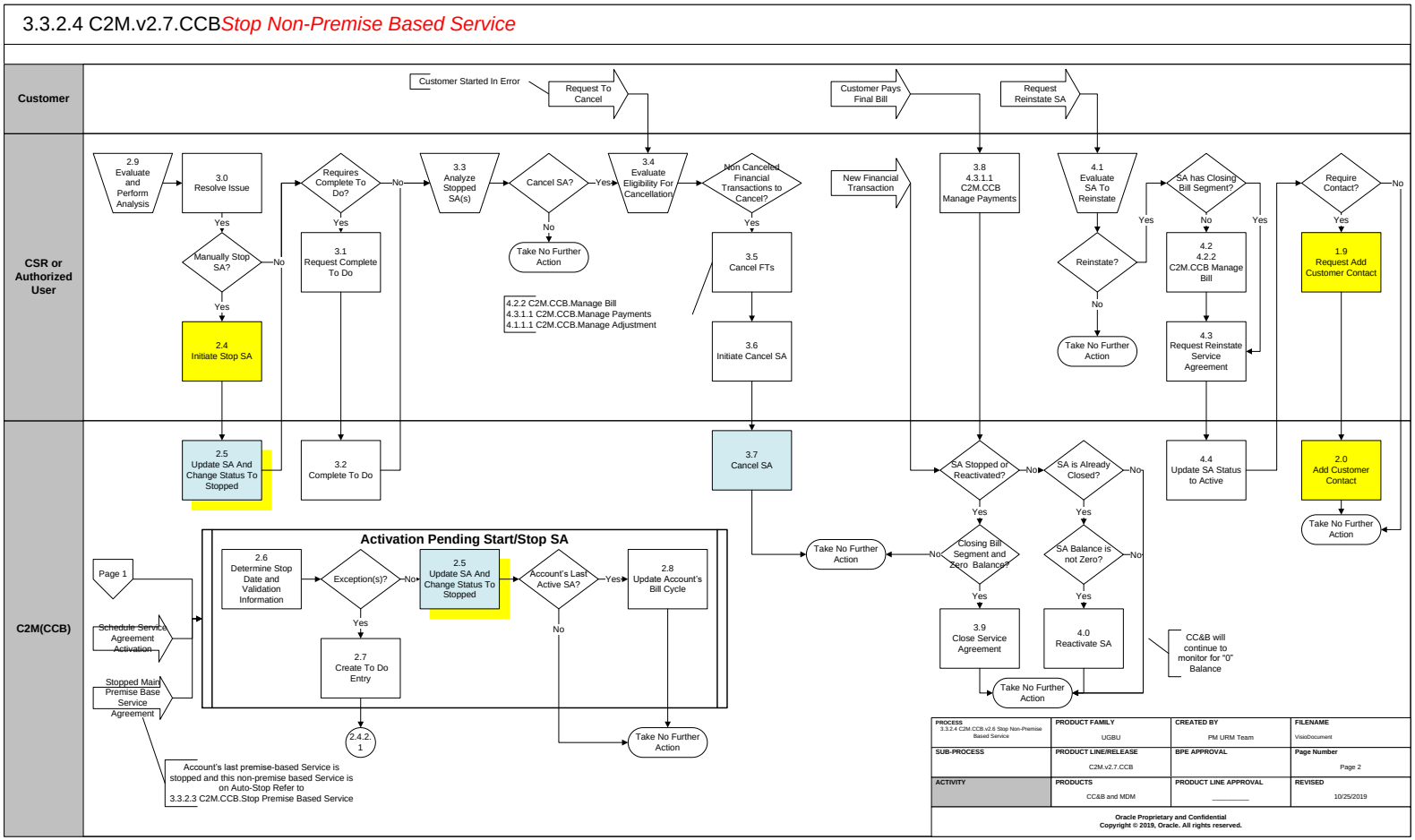
Business Process Model Page 2



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Detail Business Process Model Description

1.0 Search for Customer
Actor/Role: CSR or Authorized User
Description:
Upon receipt of request to stop 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 Stops.

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

Installation Options – Control Central Alert Algorithms
CI_PER-INFO – This person information Installation algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
C1_ACCT-INFO - This account information installation algorithm formats the "Account Information" that appears throughout the system.
CI_PHNFMT_NA – This phone type format validation algorithm validates North American phone format
C2M-PERCTINF – This person information Installation algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
X1-GLBL-CTX - This global context Installation algorithm combines the logic of CCB and MDM global context algorithms and is responsible to complete missing global context values based on values of other context fields.

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Configuration required Y **Entities to Configure:**

Installation Options
Zones
Installation Options-Framework
Identifier Type
Geographic Type

1.1 Analyze Pending Stop SA(s)
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User analyzes the existing Pending Stop service to ensure all information is received from Customer and confirms stop date.

1.2 Update SA Stop Information
Actor/Role: CSR or Authorized User
Description:
A stop date or other Service Agreement information may need to be changed. The CSR or Authorized User enters the changes.

1.3 Update SA Information
Actor/Role: C2M(CCB)
Description:
The application performs updates.

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.

Configuration required Y **Entities to Configure:**

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

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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

1.4 Select Service(s) and Request Stop
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User selects services to stop.

The CSR or Authorized User is presented with the following choices. The CSR or Authorized User selects options available to stop Non Premise Based Service Agreements.

- Stop Selected SA's – To Stop selected Service Agreements linked to the Account
- Stop a Premise To Stop All Services at the Premise (Address)
- Stop a SA – To Stop a specific SA

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- Stop all Active SA's – To Stop All service agreements linked to the Account

1.5 Update SA to Pending Stop/Stopped, Populate Stop Date, Add Pending Stop Alert
Actor/Role: C2M(CCB)
Description:
The status of the Service Agreement changes to Pending Stop/Stopped. An effective end date is populated. C2M creates a Dashboard Alert for a service agreement with a Pending Stop.

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.
C1-SAIS-ST – This SA Type initiate stop SA algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

Configuration required Y **Entities to Configure:**

Installation Options
SA 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

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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

1.6 Confirm Stop Service Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User confirms stop information including the mailing address for the final bill or if the address is changing for future bills for remaining active Service Agreements.

1.7 Enter Changes in Stop Information– Mailing Address
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User enters new information including a forwarding address. The CSR or Authorized User may change the default. The application address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is stopped.

1.8 Store Future Address
Actor/Role: C2M(CCB)
Description:
The new mailing address is stored in the application and is updated when the Service Agreement is stopped.

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

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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

2.0 Add Customer Contact
Actor/Role: CSR or Authorized User
Description:
The Customer Contact information is added in the application. Refer to process 3.4.1.1 C2M.CCB.Manage Customer Contacts.

Configuration required Y **Entities to Configure:**

Customer Contact Class
Customer Contact Type

2.1 Evaluate Pending Stop SA(s)
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the pending stop Service Agreement. The Customer may call and indicate they want to continue the service and a stop service is not required now. It is determined to cancel the Pending Stop.

2.2 Initiate Cancel for Pending Stop
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels the Pending Stop Service Agreement via the cancel checkbox on the pending stop Service Agreement.

2.3 Cancel Pending Stop
Actor/Role: C2M(CCB)
Description:
The Pending Stop Service Agreement is transitioned back to Active.

2.4 Initiate Stop SA
Actor/Role: CSR or Authorized User
Description:
If needed, and when all necessary information is available, the CSR or Authorized User will manually stop the Service Agreement.

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2.5 Update SA and Change Status to Stopped Group: Activation Pending Start/Stop SA
Actor/Role: C2M(CCB)
Description:
When all necessary information is available, the application will stop the Service Agreement.
Manual Process: The CSR or Authorized User may transition the Service Agreement to Stopped if required.
Automated Process: The application will automatically transition the Service Agreement to Stopped status when all required information is made available.

Process Plug-in enabled Y	**Available Algorithm(s):**	CI_NB-SAST– This SA Type Stop algorithm executes additional logic that should be executed when a non-billed budget SA is stopped. C2M-SAST-RF - This SA Type Stop algorithm refunds a service credit membership fee.
Customizable process N	**Process Name:**	SAACT **-** SA Activation The service agreement activation process updates pending start and pending stop service agreements.
Configuration required Y	**Entities to Configure:**	SA Type

2.6 Determine Stop Date and Validation Information Group: Activation Pending Start/Stop SA
Actor/Role: C2M(CCB)
Description:
The application's background process, **SAACT**, periodically checks to see if Service Agreements can be stopped. If the Service Agreement's stop date less than the current business date then a SA is available to be stopped, otherwise SA is ignored until the next check period. If an SA is available to be stopped, the application will validate all the SA stop 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 Stopped.

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

2.7 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
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.

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Customizable process N **Process Name:**

SAACT - SA Activation – activates and stops Service Agreements when all required information is available.
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

2.8 Update Account's Bill Cycle Group: Activation Pending Start/Stop SA
Actor/Role: C2M(CCB)
Description:
The application changes the Bill Cycle when the last Service Agreement for the account is stopped to allow final bill creation.

2.9 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

3.0 Resolve Issue
Actor/Role: CSR or Authorized User
Description:
Based on established business rules, the CSR or Authorized User has identified and resolved the issue. The CSR or Authorized User has determined next steps.

3.1 Request Complete To Do

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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 exception 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

3.2 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

Configuration required Y **Entities to Configure:**

3.3 Analyze Stopped SA(s)
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User may review the stopped Service Agreement. Information made available requires further evaluation. The Service Agreement may need to be canceled.

3.4 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 Service Agreement. The CSR or Authorized User evaluates if Financial Transactions can be canceled and proceeds with next steps.

3.5 Cancel FTs
Actor/Role: CSR or Authorized User
Description:
Subject to established business rules, the CSR or Authorized User cancels the existing Financial Transactions. An applicable Cancel Reason is selected. 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.

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Configuration required Y **Entities to Configure:**

Cancel Reason for Bill, Payment or Adjustment

3.6 Initiate Cancel SA
Actor/Role: CSR or Authorized User
Description:
The CSR changes the Service Agreement status to Canceled.

3.7 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
C1-CNC-TUM – This Algorithm Type retrieves and cancels true up monitors associated with the SA being canceled

Configuration required Y **Entities to Configure:**

SA Type
To Do Type
To Do Role
Service Task Type

3.8 4.3.1.1 C2M.CCB Manage Payments
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User enters the payment in the application or the payment is received through online options. Refer to 4.3.1.1 C2M.CCB.Manage Payments.

3.9 Close Service Agreement
Actor/Role: C2M(CCB)
Description:
The Service Agreement is automatically transitioned to Closed Status when the balance is "0".

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4.0 Reactivate SA
Actor/Role: C2M(CCB)
Description:
The system moves the Service Agreement to Reactivated status if a financial transaction is created after a Service Agreement is closed. When the financial balance returns to "0", the Service Agreement is transitioned to Closed again.

4.1 Evaluate SA to Reinstate
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews and gathers available information to reinstate SA.

4.2 4.2.2 C2M.CCB Manage Bill
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels existing Bill Segment Financial Transactions. Refer specifically to 4.2.2.4 C2M.CCB-MDMManage External and Miscellaneous Charges, 4.2.2.5 C2M.CCB-MDM Manage Loan Charges, and 4.2.2.6 Manage Deposit Charges.

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

4.3 Request Reinstate SA
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User initiates the Reinstate SA function.

4.4 Update SA Status to Active
Actor/Role: C2M(CCB)
Description:
The Reinstate action in the application changes the status of the Service Agreement to Active. The Reinstate action can be used to reinstate a closed, reactivated, or stopped Service Agreement.

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Test Documentation related to the Current Process

ID	Document Name	Test Type

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Document Control

Change Record

Date	Author	Version	Change Reference
2/24/09	Colleen King	Draft 1a	No Previous Document
3/4/09	Colleen King		Updates
3/19-3/26/09	Colleen King	Multiple Versions	Updates
07/12/09	Galina Polonsky		Reviewed
8/14/09	Colleen King		After Review
10/20/10	Geir Hedman		Update Title and Content page
11/11/10	Jenny Vagilidad		Added other algorithms and Auto-Stop non-premise based SAs functionality
2/8/11	Geir Hedman		Update Document and Visio
4/2/13	May Wang	V2.4	Update Document and Visio
05/05/2013	Galina Polonsky		Reviewed, Approved
July 18, 2017	Phillip Martin		Created from CCB v2.4 version of process
09/14/2017	Ekta Dua		Update Document and Visio
12/21/2017	Colleen King		Update Document and Visio
12/22/2017	Galina Polonsky		Reviewed, Approved
05/29/2019	Satya Kalavala		Updated Format for v2.7

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Attachments

Start/Stop – Pending Stop

Start Stop Main Non Premise Based Servic

Service Agreement

Pending Stop Non Premise Based Servic

Control Central Search –

"Control Central Search.doc"

Dashboard Alert – Pending Stop

"Dashboard Alert for Pending Stop.doc"

Admin Menu/Installation Options/Control Central Alerts

Installation Options Framework Control C

Non-Premise Based SA Types

"Standard Non-Premise Based S

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