

**CCS**  
**C2M.CCB**

**3.3.2.4a Terminate Contracts and Stop Non-Premise Based Service**

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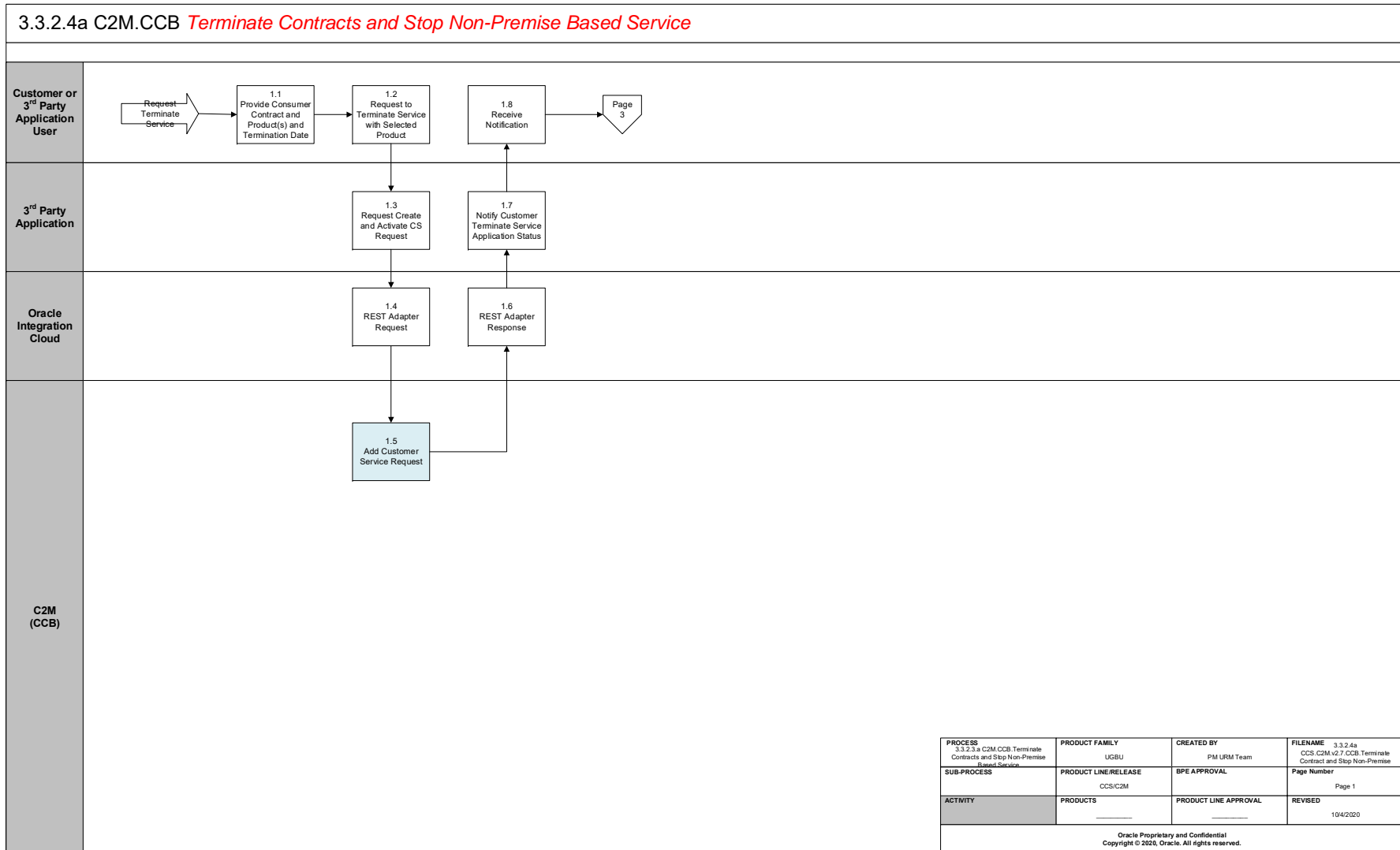
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## Brief Description

**Business Process:** 3.3.2.4a C2M.Terminate Contracts and Stop Non-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

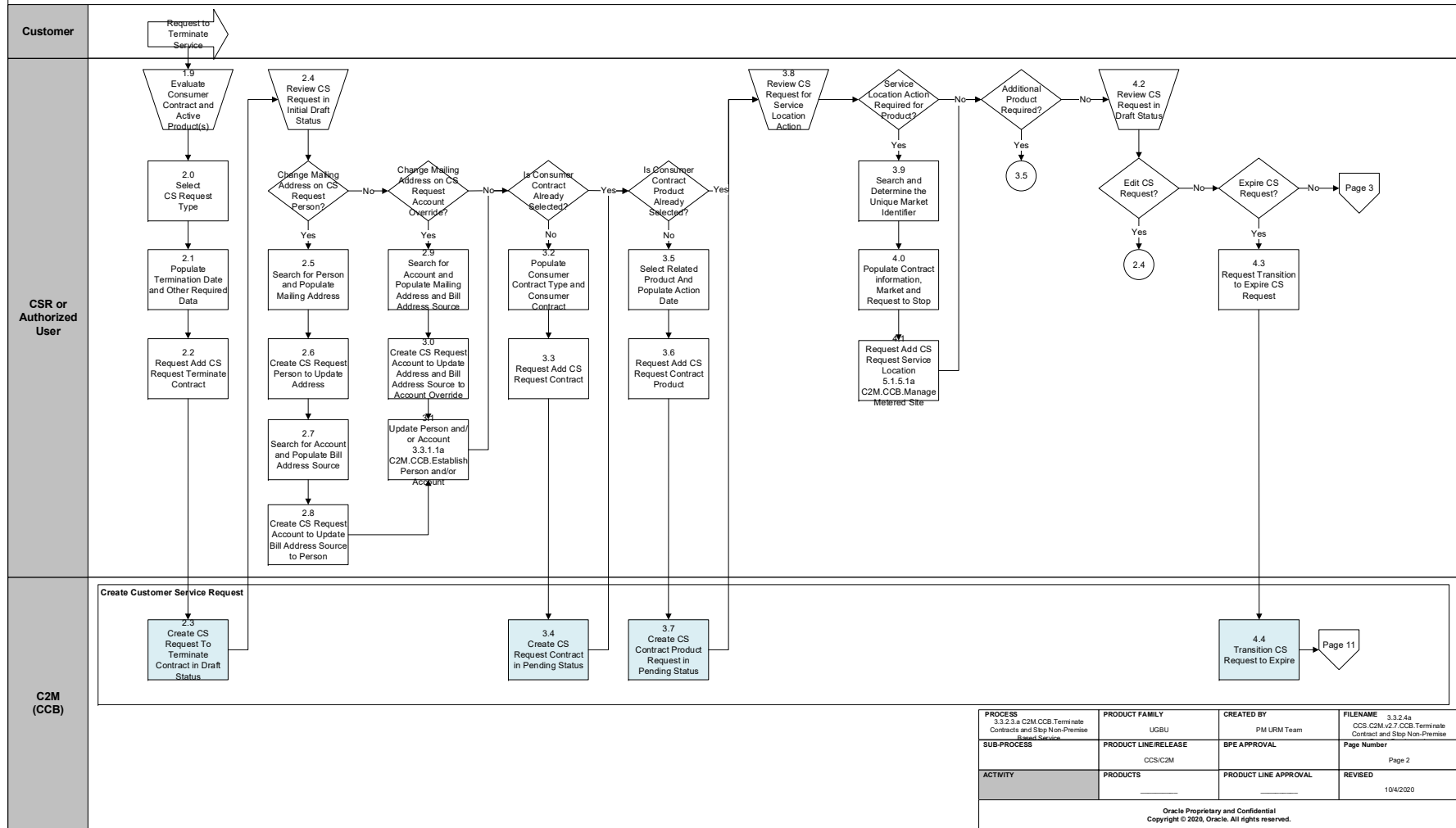
This business takes place when customers contact the service provider to terminate their service contract. An authorized user evaluates the customer's request and initiates Customer Service Request to terminate their contract and stop non-premise based services.

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# Business Process Model Page 2

## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*

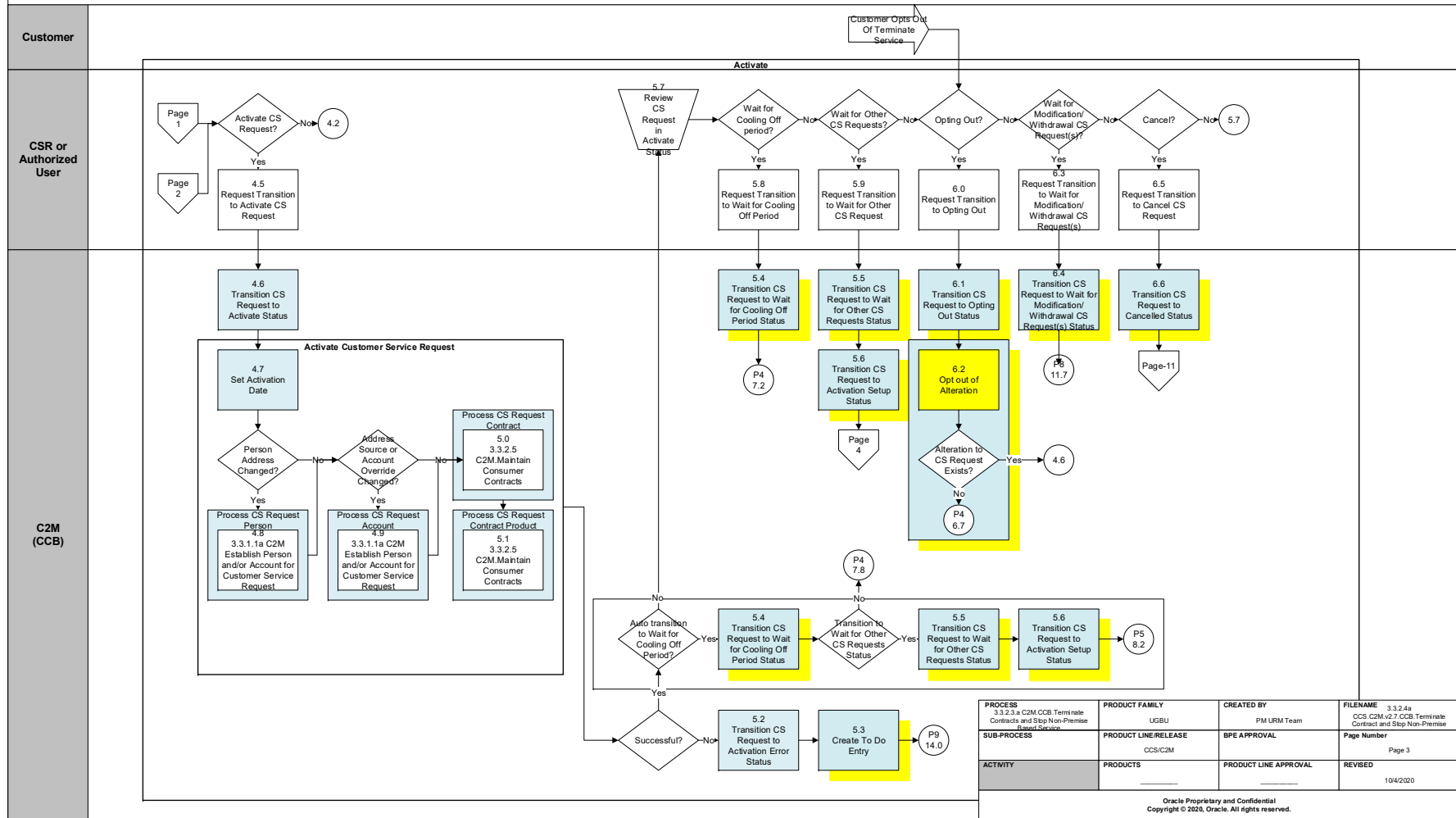


PROCESS 3.3.2.4a C2M.CCB.Terminate Contracts and Stop Non-Premise Based Service	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.2.4a C2M.v27.CCB.Terminate Contract and Stop Non-Premise
SUB-PROCESS	PRODUCT LINE/RELEASE CCS/C2M	BPE APPROVAL	Page Number Page 2
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/4/2020

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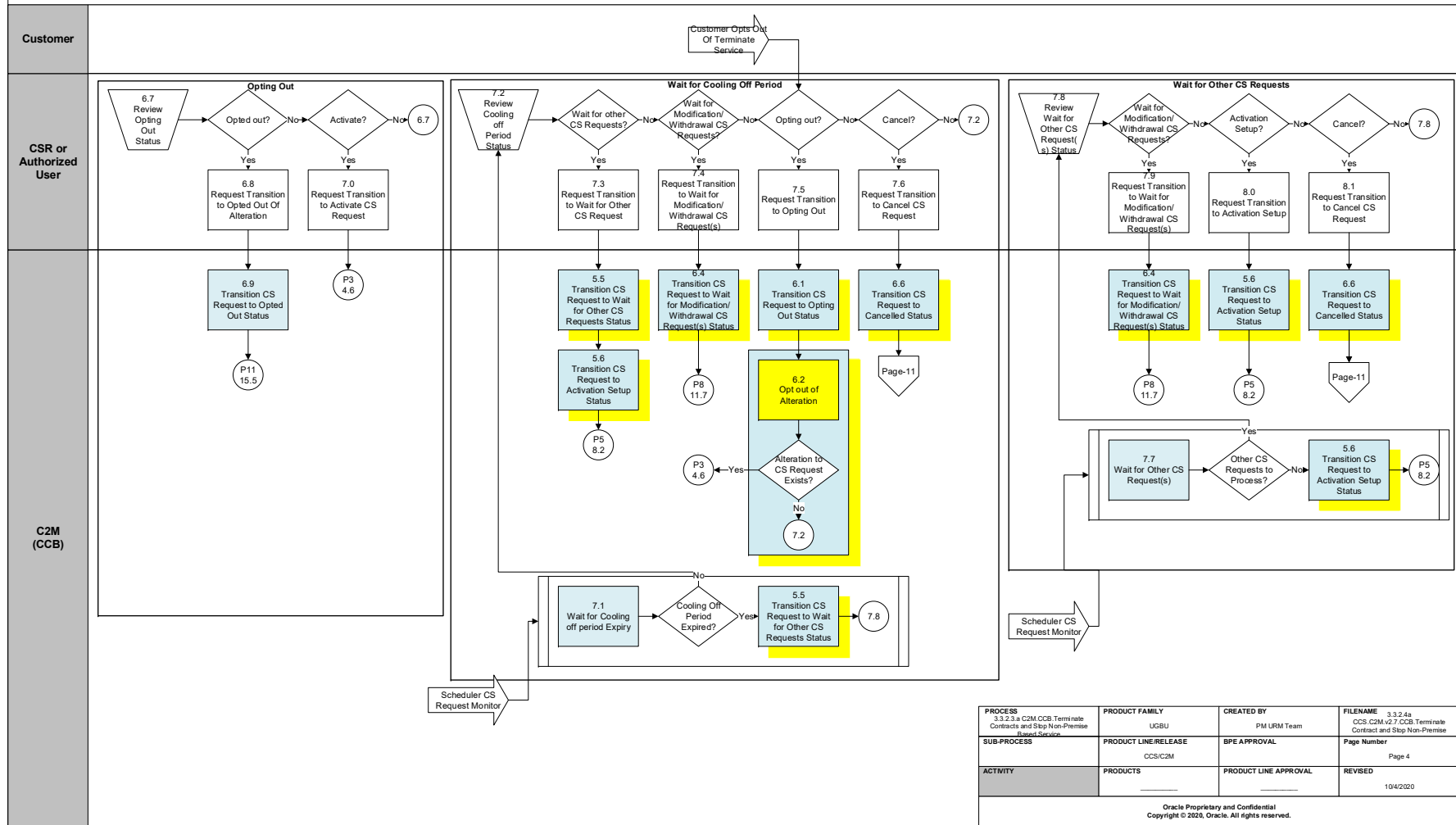
# Business Process Model Page 3

## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



# Business Process Model Page 4

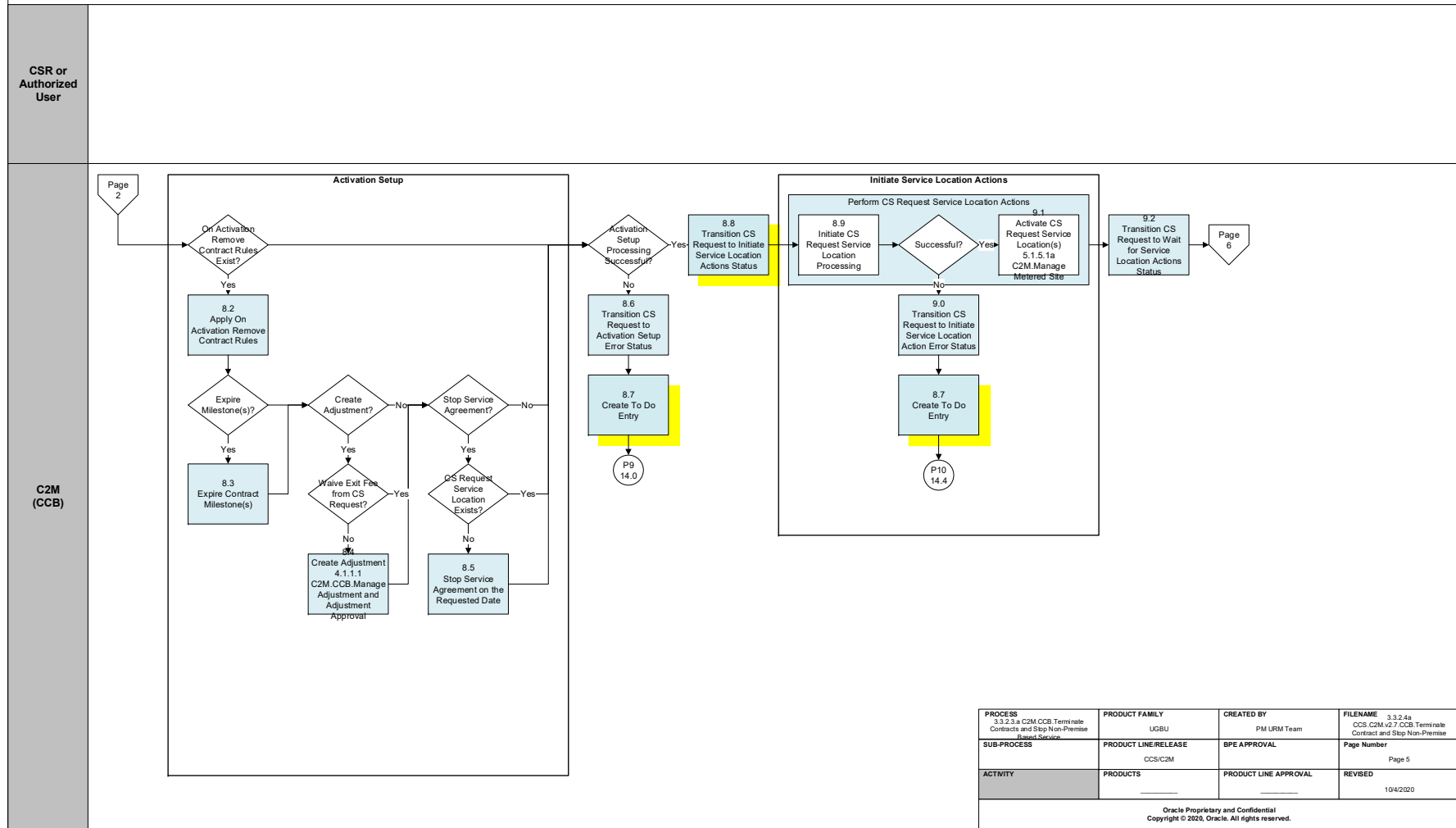
## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*





# Business Process Model Page 5

## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*

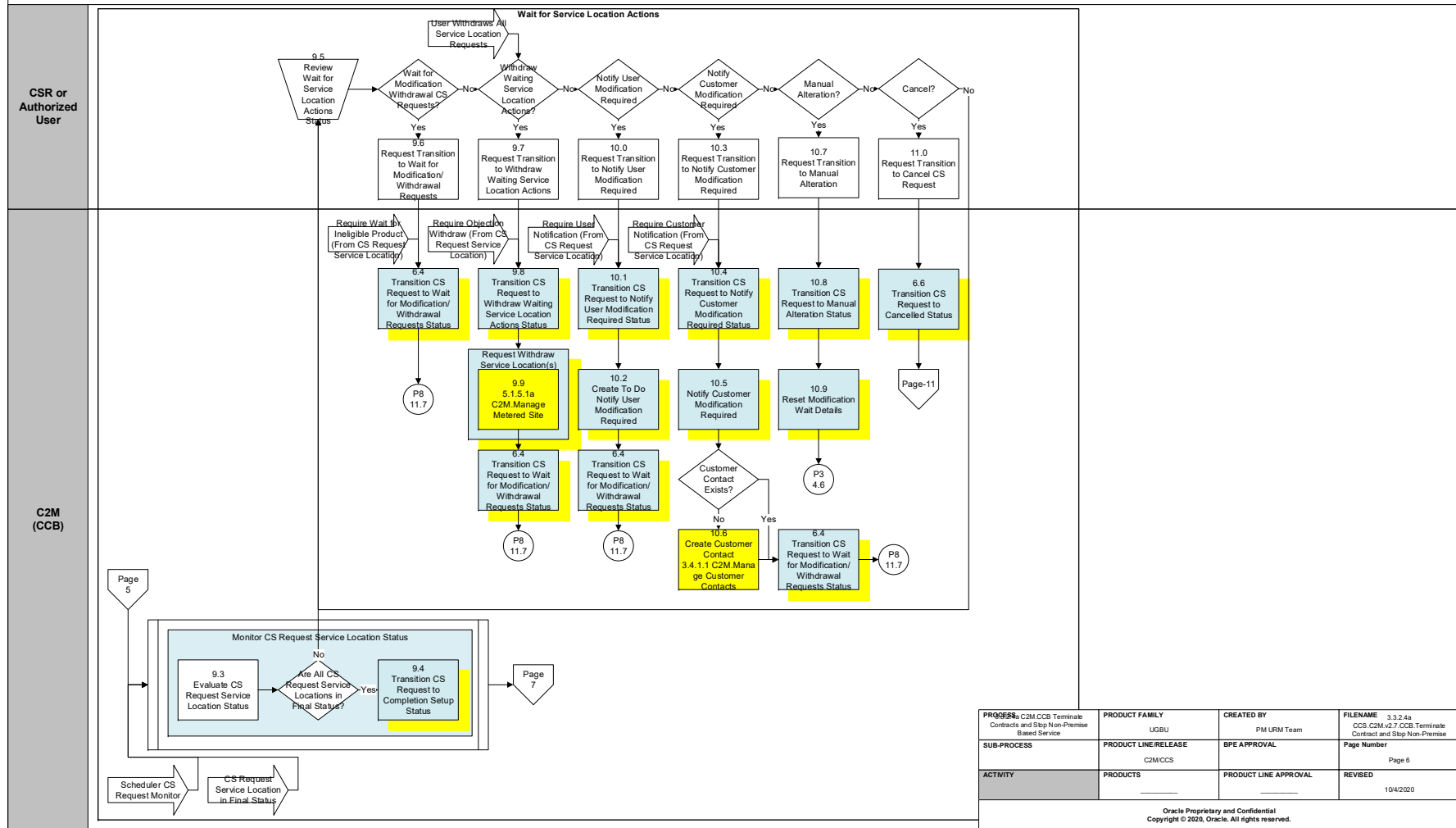


PROCESS 3.3.2.3a C2M.CCB.Terminate Contracts and Stop Non-Premise Based Service	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME 3.3.2.4a CCS.C2M.v2.1.CCB.Terminate Contract and Stop Non-Premise
SUB-PROCESS	PRODUCT LINE/RELEASE CCS/C2M	BPE APPROVAL	Page Number Page 5
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED 10/4/2020

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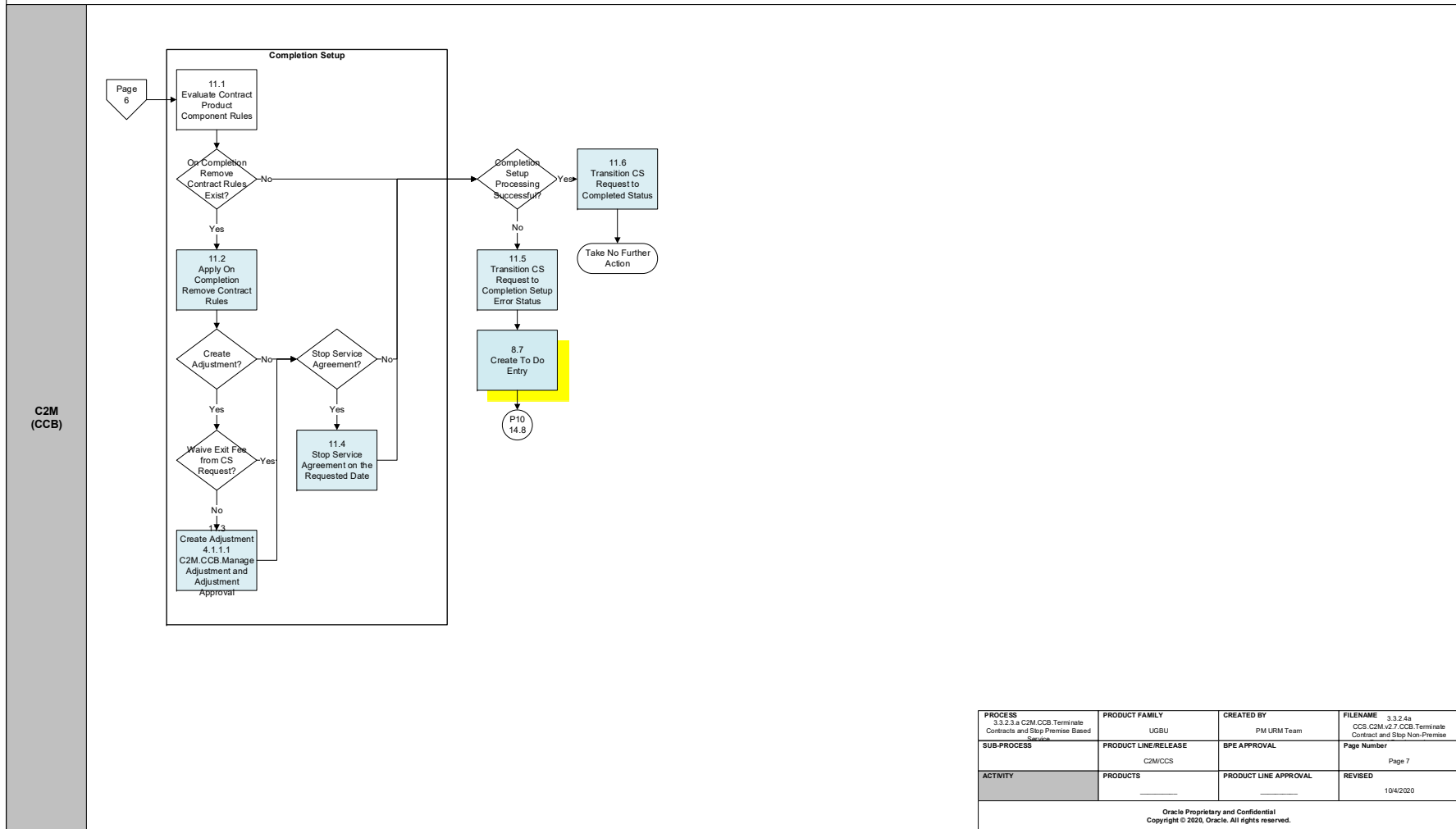
# Business Process Model Page 6

## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



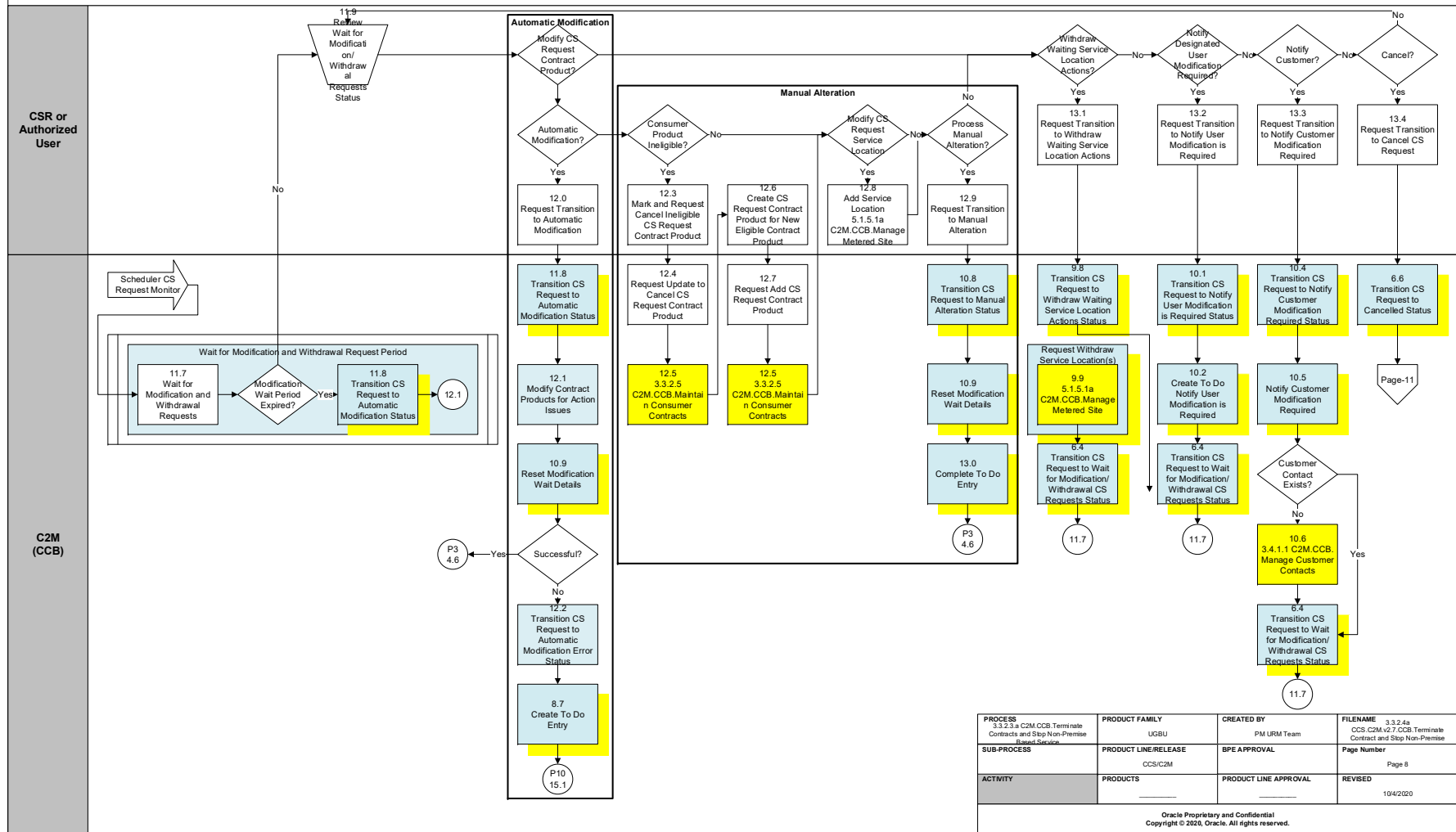
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## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



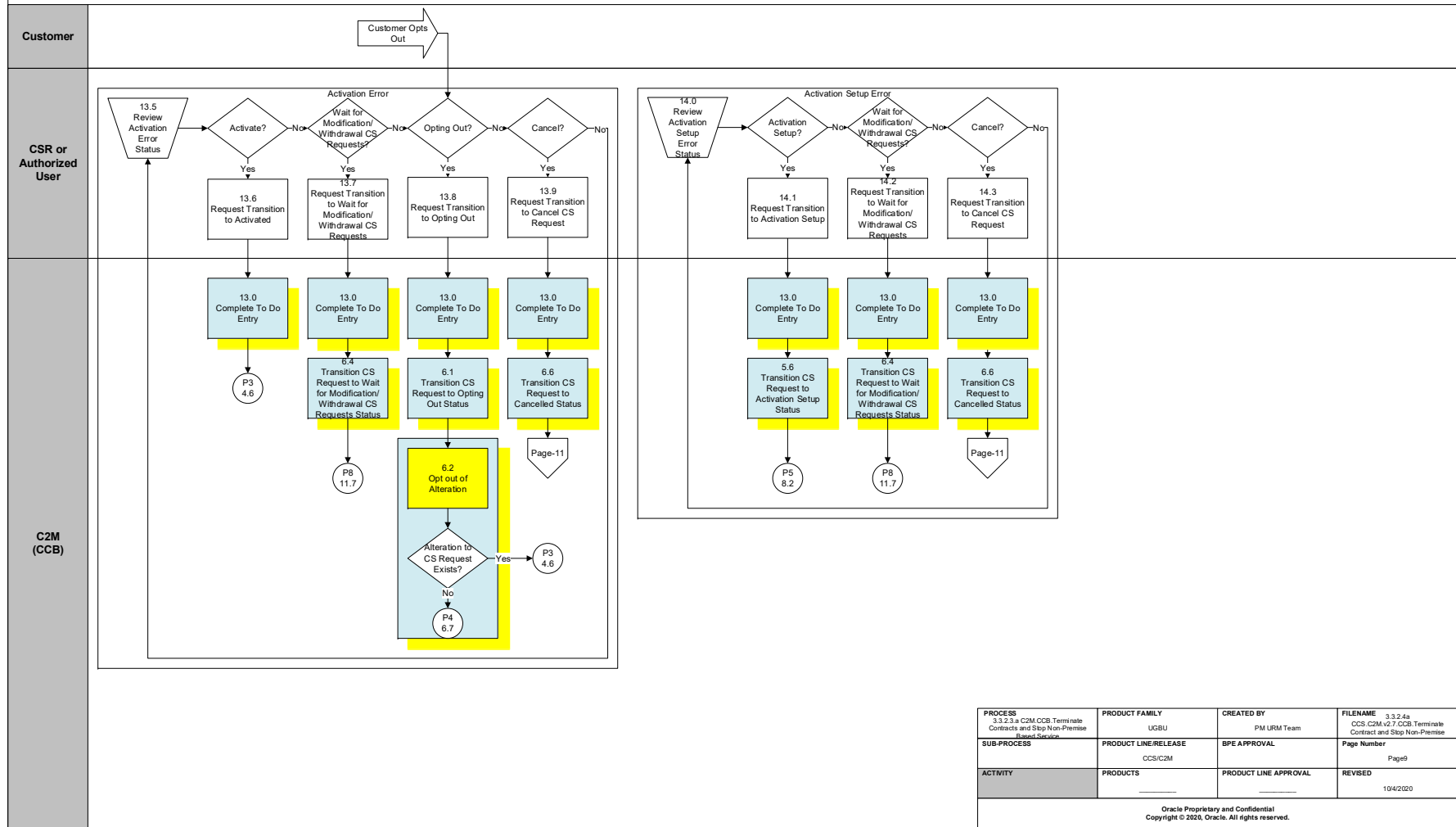
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## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



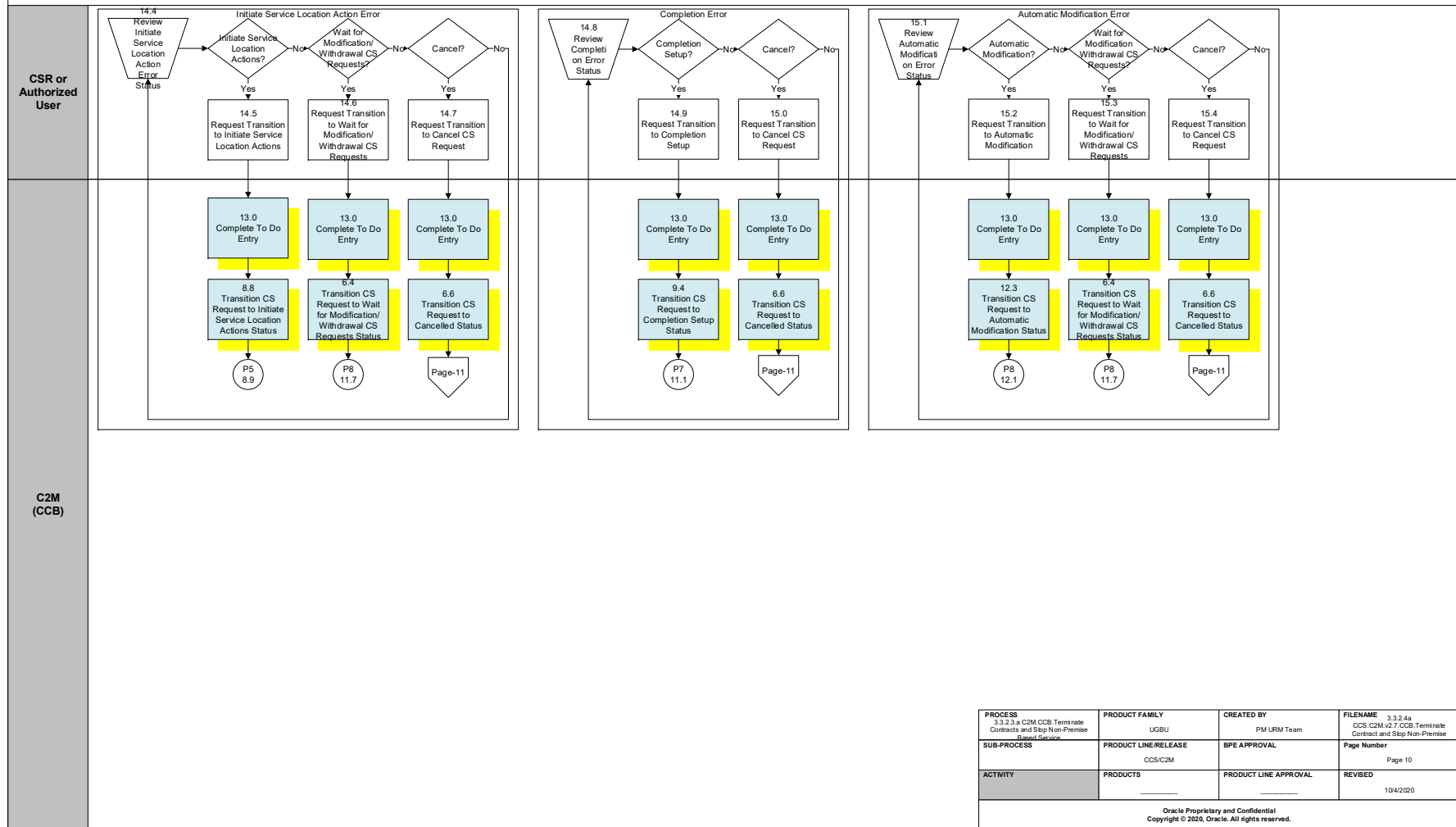
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## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



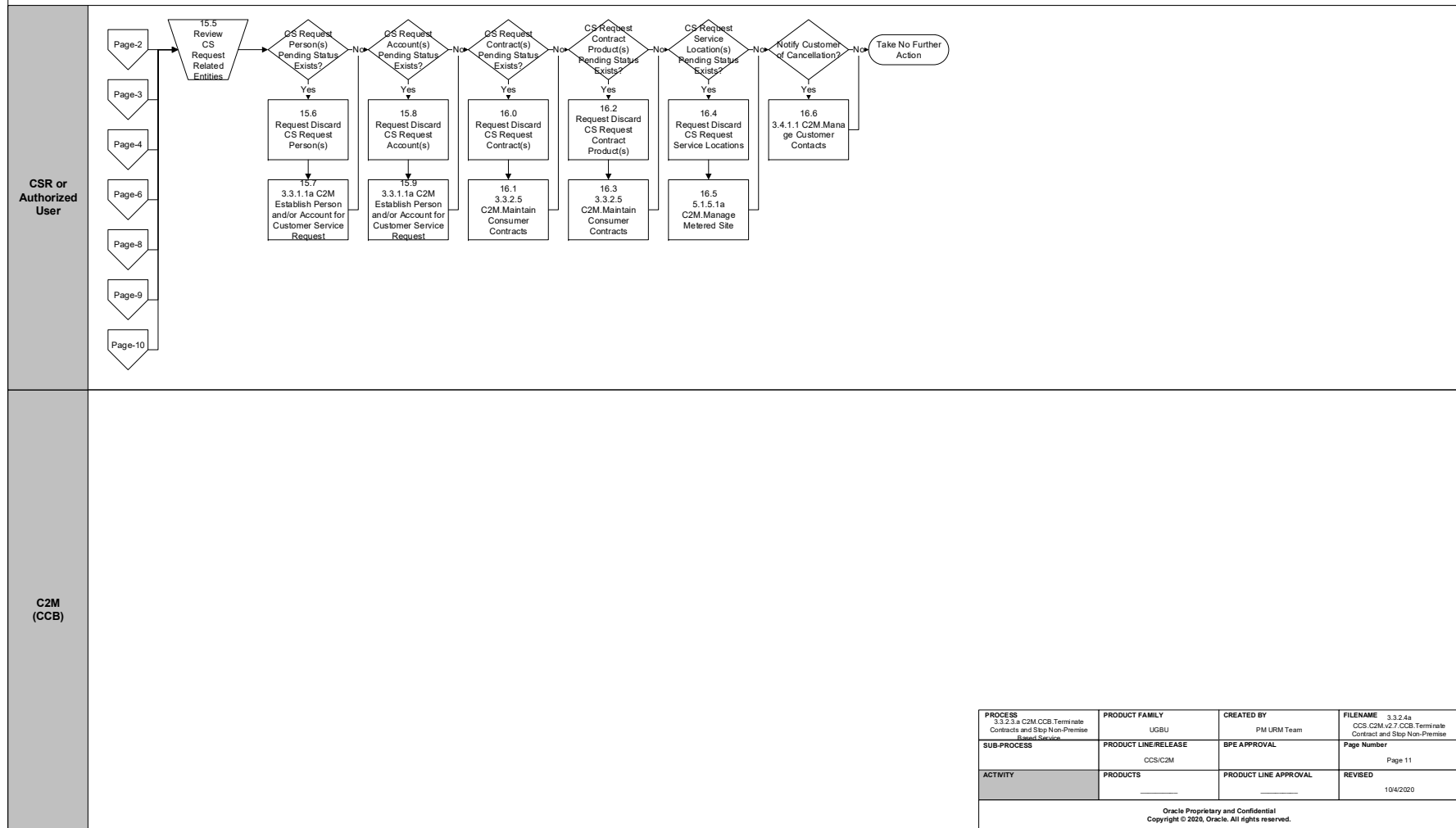
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## 3.3.2.4a C2M.CCB *Terminate Contracts and Stop Non-Premise Based Service*



<b>PROCESS</b> 3.3.2.3a C2M.CCB Terminate Contracts and Stop Non-Premise Based Service	<b>PRODUCT FAMILY</b> UGBU	<b>CREATED BY</b> PM URM Team	<b>FILENAME</b> 3.3.2.4a CCS_C2M.v21_CCB_Terminate Contract and Stop Non-Premise
<b>SUB-PROCESS</b>	<b>PRODUCT LINE/RELEASE</b> CCS/C2M	<b>BPE APPROVAL</b>	<b>Page Number</b> Page 11
<b>ACTIVITY</b>	<b>PRODUCTS</b>	<b>PRODUCT LINE APPROVAL</b>	<b>REVISED</b> 10/4/2020

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## Detail Business Process Model Description

### 1.1 Provide Consumer Contract and Product(s) and Termination Date

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

**Description:**

The Customer or a 3<sup>rd</sup> Party Application User will provide the 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 3<sup>rd</sup> Party Application User

**Description:**

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

### 1.3 Request Create and Activate CS Request

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

**Description:**

The 3<sup>rd</sup> 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.



### **1.7 Notify Customer Terminate Service Application Status**

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

**Description:**

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

### **1.8 Receive Notification**

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

**Description:**

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

### **1.9 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).

**Available Plug-In(s)**

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

**Business Object**

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

**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)**

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)

### **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)**

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

**Business Object**

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

**4.7 Set Activation Date**

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

**Description:**

The Activation Date will be set on the CS Request.

**Available Plug-In(s)**

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

**Business Object**

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

**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)**

C1-TRAPERCRQ - Process Customer Service Request persons to Add/Update Persons
---

**Business Object**

C1-ContractChangeReqPersonRoot (Contract Change Request Person Root)
C1-ChangeContChangeRequest (Change Contract)

**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)**

C1-TRAACCCRQ - Process Customer Service Request Accounts to Add/Update Account
--

**Business Object**

C1-ContractChngeReqAccountRoot (Contract Change Request Account Root)
C1-ChangeContChangeRequest (Change Contract)

**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)**

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

**Business Object**

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

**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:**

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

**Available Plug-In(s)**

C1-OPTOUT - Opting Out of Alteration

**Business Object**

C1-ContractChangeRequest (Contract Change Request Root)

C1-ChangeContChangeRequest (Change Contract)

**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.

### **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 to 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)**

C1-CHKCOOLOF Check CS Request Cooling Off End Date/Time
--

**Business Object**

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

**Background Process**

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

### **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**

C1-ContractChangeRequest (Contract Change Request Root)

C1-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
--

**Business Object**

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

**Entities to Configure:**

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

**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)**

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

**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.

<b>Available Plug-In(s)</b>	C1-STCNCPSA - Stop-Cancel Service Agreement for Contract Product
<b>Business Object</b>	C1-StopCancelContractProductSA (Stop or Cancel Service Agreement for a Contract Product)
	C1-ConsumerContractRule (Consumer Contract Rule)
	C1-ContractChangeRequest (Contract Change Request Root)
	C1-ChangeContChangeRequest (Change Contract)
<b>Entities to Configure:</b>	Service Agreement
	Consumer Contract Rule
	Consumer Contract Product
	Consumer Contract Product Component

**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)	C1-CSRERRTD - Create To Do for Customer Service Request
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<b>Business Object</b>	C1-ContractChangeRequest (Contract Change Request Root)
	C1-ChangeContChangeRequest (Change Contract)

**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.

**Available Plug-In(s)**

C1-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)

**9.0 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)**

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

**Business Object**

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

**Background Process**

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

**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.



**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-NTUSRMODR - 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

**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.

**Available Plug-In(s)**

C1-NTCUSTMOD - Notify Customer Modification is Required

**Business Object**

C1-ContractChangeRequest (Contract Change Request Root)

C1-ChangeContChangeRequest (Change Contract)

**Entities to Configure:**

Customer Contact Type

Customer Contact Class

Notification Type

**Background Process**

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

**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.

**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)**

C1-RSTMODWT - Reset Modification Wait Details
C1-ConAltPre Basic Contract Alteration UI Map Pre-Processing
C1-CSRequestAlteration Customer Service Request Contract Product Details
C1-ConAltPos Basic Contract Alteration UI Map Post-Processing

**Business Object**

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

**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)**

C1-RSTMODWT - Reset Modification Wait Details
---

**Business Object**

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

**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.

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

**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.

<b>Available Plug-In(s)</b>	C1-EXTFEEADJ - Apply Contract Rule - Add Early Exit Fee Adjustment
<b>Business Object</b>	C1-CCRuleAddEarlyExitFeeAdjmt (Add Early Exit Fee Adjustment) C1-ConsumerContractRule (Consumer Contract Rule) C1-ContractChangeRequest (Contract Change Request Root) C1-ChangeContChangeRequest (Change Contract)
<b>Entities to Configure:</b>	Service Agreement Adjustment Type Consumer Contract Rule Consumer Contract Product Consumer Contract Product Component

**11.4 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-STCNCPSA - Stop-Cancel Service Agreement for Contract Product
--

**Business Object**

C1-StopCancelContractProductSA (Stop or Cancel Service Agreement for a Contract Product)
--

C1-ConsumerContractRule (Consumer Contract Rule)
--

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

C1-ChangeContChangeRequest (Change Contract)
--

**Entities to Configure:**

Service Agreement
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Consumer Contract Rule
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Consumer Contract Product
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Consumer Contract Product Component
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**11.5 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.

**11.6 Transition CS Request to Completed Status****Actor/Role:** C2M(CCB)**Description:**

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

**11.7 Wait for Modification and Withdrawal Requests****Actor/Role:** C2M(CCB)**Description:**

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

**Available Plug-In(s)**

C1-WTMDWTHRQ - Wait for Modification and Withdrawal Requests
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**Business Object**

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

**Background Process**

F1-GEN-BOMON - Transition to Default Next Status (Script)
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**11.8 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.

**11.9 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

**12.0 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.

**12.1 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)

**12.2 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.

**12.3 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.

**12.4 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.

**12.5 3.3.2.5 C2M.Maintain Consumer Contracts**

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

**Description:**

Refer to 3.3.2.5 C2M.Maintain Consumer Contracts process.

**12.6 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

**12.7 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.

**12.8 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.

**12.9 Request Transition to Manual Alteration****Actor/Role:** CSR or Authorized User**Description:**

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

**Available Plug-In(s)**

C1-UPDATEALT - Update Customer Service Request Alteration Switch
C1-ConAltPre Basic Contract Alteration UI Map Pre-Processing
C1-CSRequestAlteration Customer Service Request Contract Product Details
C1-ConAltPos Basic Contract Alteration UI Map Post-Processing

**Business Object**

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

**13.0 Complete To Do Entry****Actor/Role:** C2M(CCB)**Description:**

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

**Available Plug-In(s)**

F1-TODOCOMPL - Generic To Do Completion
---

**Business Object**

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

**13.1 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

**13.2 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



### **13.3 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

### **13.4 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.

### **13.5 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

### **13.6 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.

### **13.7 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.

### **13.8 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.

### **13.9 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.

#### **14.0 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

#### **14.1 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.

#### **14.2 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.

#### **14.3 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.

#### **14.4 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

#### **14.5 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.

#### **14.6 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.

#### **14.7 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.

#### **14.8 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

#### **14.9 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.

#### **15.0 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.

#### **15.1 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

#### **15.2 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.

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

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

**Description:**

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

#### **15.4 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.

#### **15.5 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

#### **15.6 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).

#### **15.7 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.

#### **15.8 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).

#### **15.9 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.

**16.0 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).

**16.1 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.

**16.2 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).

**16.3 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.

**16.4 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).

**16.5 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.

**16.6 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.

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## Test Documentation related to the Current Process

ID	Document Name	Test Type

## Document Control

### Change Record

Date	Author	Version	Change Reference
07/23/2020	Hala Nabi Mark Berry	Initial version	
07/27/2020	Rachelle Alegado	revised version	Multiple updates, added logic to align with sibling processes
07/30/2020	Jeremy Quan		review
08/04/2020	Galina Polonsky		Reviewed, Approved

## Attachments

### Consumer Contract Query Page:



Consumer Contract  
Query.docx

### Select Customer Service Request Type Page:



Select Customer  
Service Request Type.

### Customer Service Request - Terminate Contract Page:



Customer Service  
Request - Terminate C

### Contract Change Request Person Page:



Contract Change  
Request Person.docx

### Contract Change Request Account Page:

Account source is Person:



Contract Change  
Request Account with



Account source is Account Override:



Contract Change  
Request Account with

### **Contract Change Request Contract Page:**



Contract Change  
Request Contract.doc

### **Contract Change Request Contract Product Page:**



Contract Change  
Request Contract Prox

### **Customer Service Request Service Location Page:**



Customer Service  
Request Service Locat

### **Contract Change Request Service Location Page:**



Contract Change  
Request Service Locat