Contents

BRIEF DESCRIPTION ................................................................................................................................. 4
BUSINESS PROCESS MODEL ...................................................................................................................... 5
TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS .......................................................... 6
DOCUMENT CONTROL ........................................................................................................................... 7
ATTACHMENTS: ......................................................................................................................................... 8
Brief Description

Business Process: 3.3.5 C2M.CCB.Establish and Maintain Loan
Process Type: Process
Parent Process: 
Sibling Processes:

This process describes business events that take place if Customer's request for Loan is satisfied by Utility Organization. When the customer enters into a Loan with the organization, Loan terms and conditions and other significant details of the contract are documented and set up within application, regular billing occurs with a due date for loan payments. Loans are stopped and closed when amount Customer owes the Organization is fully paid off.

Examples of loans can include:

- Conservation options for insulation and high-energy furnaces
- Service extensions for new construction or Service upgrades
- Products that promote the services of the organization

Note: Loans are separate Service Agreements and hold the loan terms, including the loan amount, periodic payment amount, number of payment periods, interest rate, and billing frequency based on configurable business rules.
Business Process Model

3.3.5 C2M.v2.7.CCB Establish and Maintain Loan

[Diagram showing process flow for establishing and maintaining loans, including steps like Request New Loan, Request To Cancel Loan, Initiate Stop Loan, etc.]
Test Documentation related to the Current Process

<table>
<thead>
<tr>
<th>ID</th>
<th>Document Name</th>
<th>Test Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Document Control

## Change Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/23/2012</td>
<td>Becky Ray</td>
<td></td>
<td>No Previous Document</td>
</tr>
<tr>
<td>03/12/2012</td>
<td>Galina Polonsky</td>
<td></td>
<td>Review</td>
</tr>
<tr>
<td>02/12/2014</td>
<td>Dean Davis</td>
<td></td>
<td>Update</td>
</tr>
<tr>
<td>02/16/2014</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>09/11/2017</td>
<td>Ekta Dua</td>
<td></td>
<td>Updated document for C2M</td>
</tr>
<tr>
<td>09/12/2017</td>
<td>Chetan Raut</td>
<td></td>
<td>Updated the Visio diagram for C2M.</td>
</tr>
<tr>
<td>09/30/2017</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>05/29/2019</td>
<td>Satya Kalavala</td>
<td></td>
<td>Updated Format for v2.7</td>
</tr>
</tbody>
</table>
Attachments: