



## **C2M.v2.7.CCB**

### **3.3.5.1 C2M.CCB Establish and Maintain Loan**

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## Brief Description

**Business Process:** 3.3.5.1 C2M.CCB.Establish and Maintain Loan  
**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 Service, 3.3.2.3 C2M.CCB.Stop Premise Based Service, 3.3.2.2 C2M.CCB.Start Non-Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non-Premise Based Service 3.3.1.1 C2M.CCB.Establish Person and/or Account, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 4.2.2.5 C2M.CCB.Manage Loan Charges

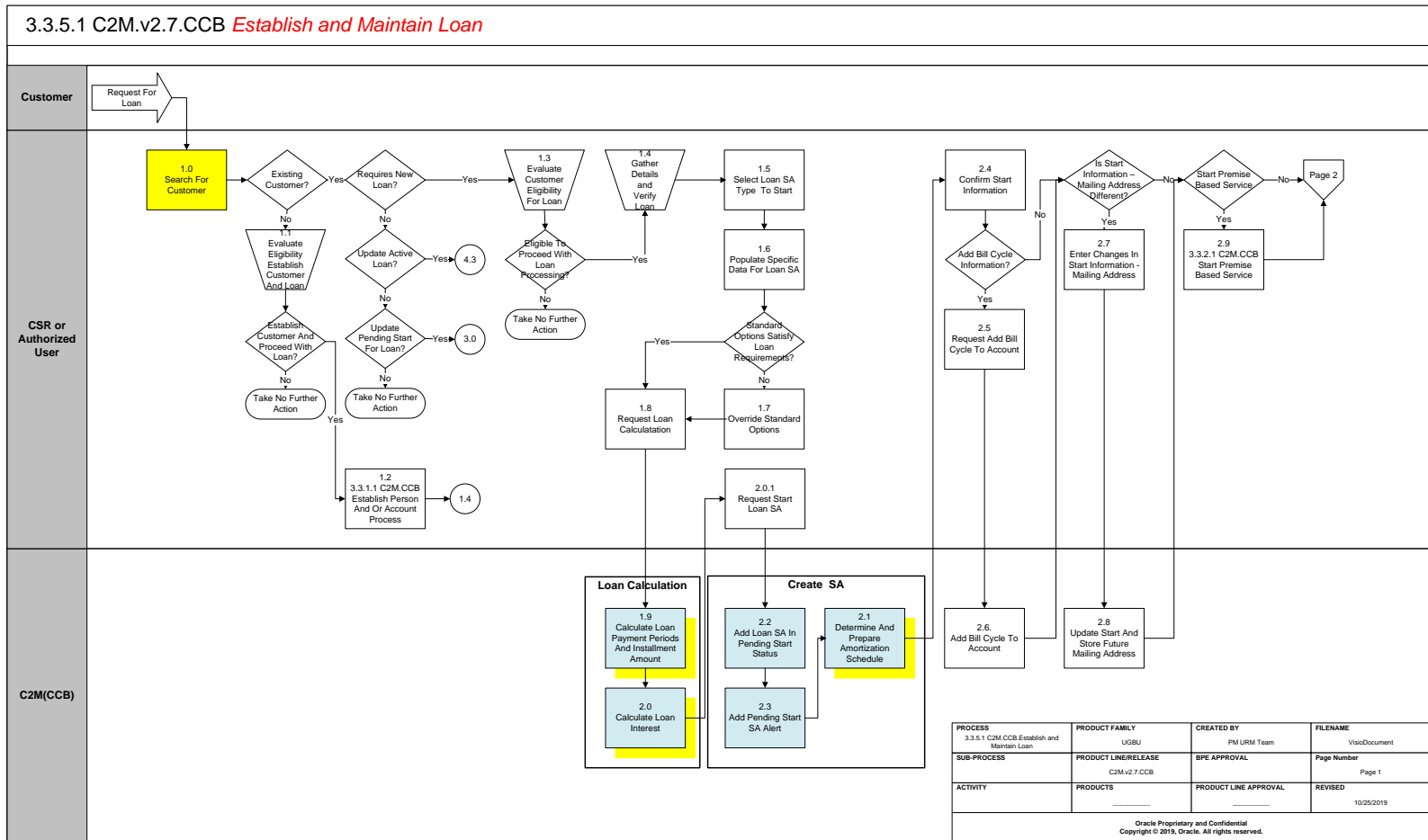
Organizations may offer special services and products for their customers and allow the customer to pay in installments over time. This process outlines how the Loan Service Agreement functionality in C2M(CCB) can be used to set up loans for customers. Examples of loans can include:

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

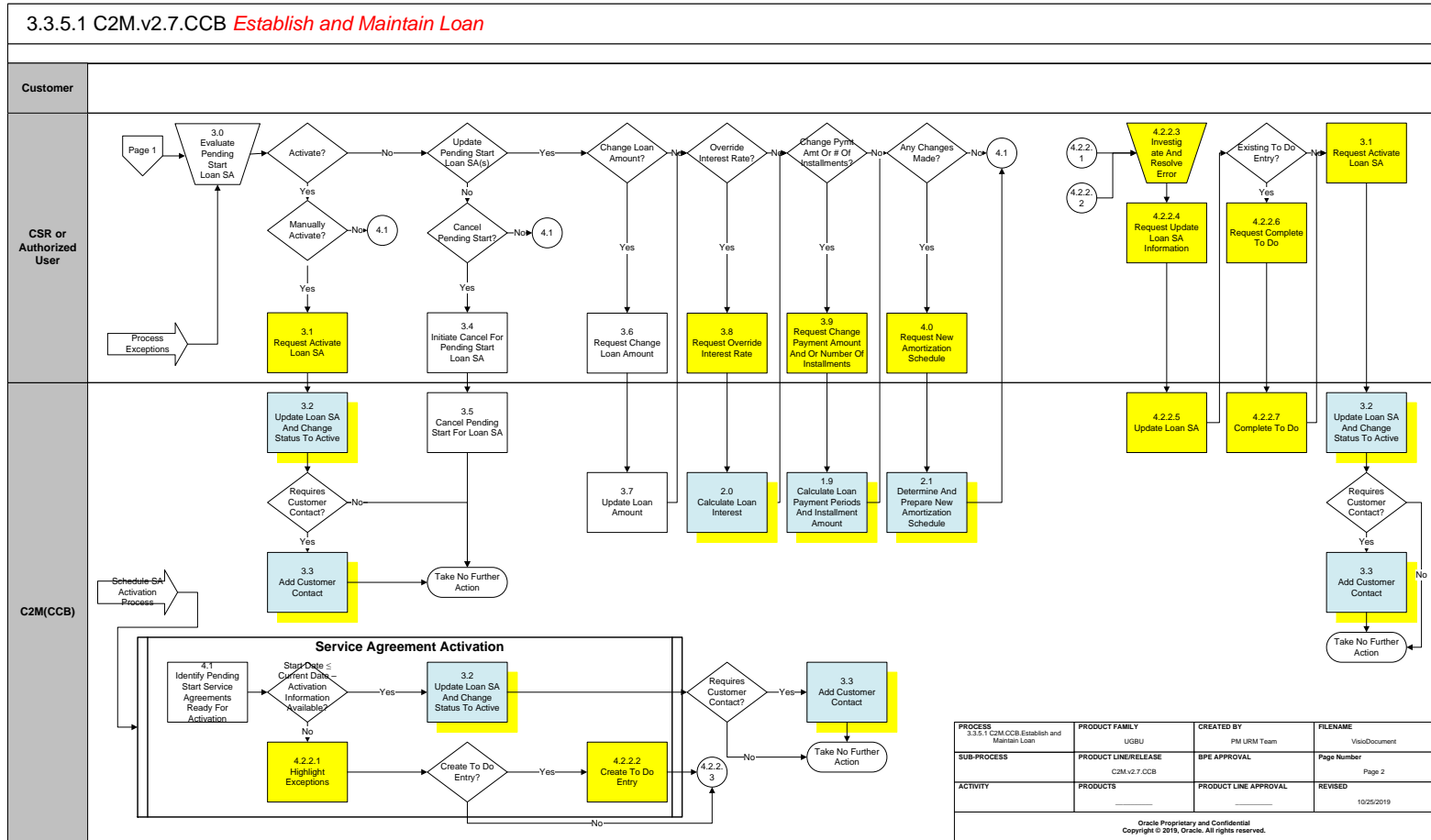
Loans are separate Service Agreements and hold the loan terms, including the loan amount, periodic payment amount, number of payment periods, interest rate, and billing frequency based on configurable business rules.

When the customer enters into a Loan with the organization regular billing occurs with a due date for loan payments. If the customer does not pay in a timely manner, C2M(CCB) can prompt the customer or flag the organization to begin collection efforts.

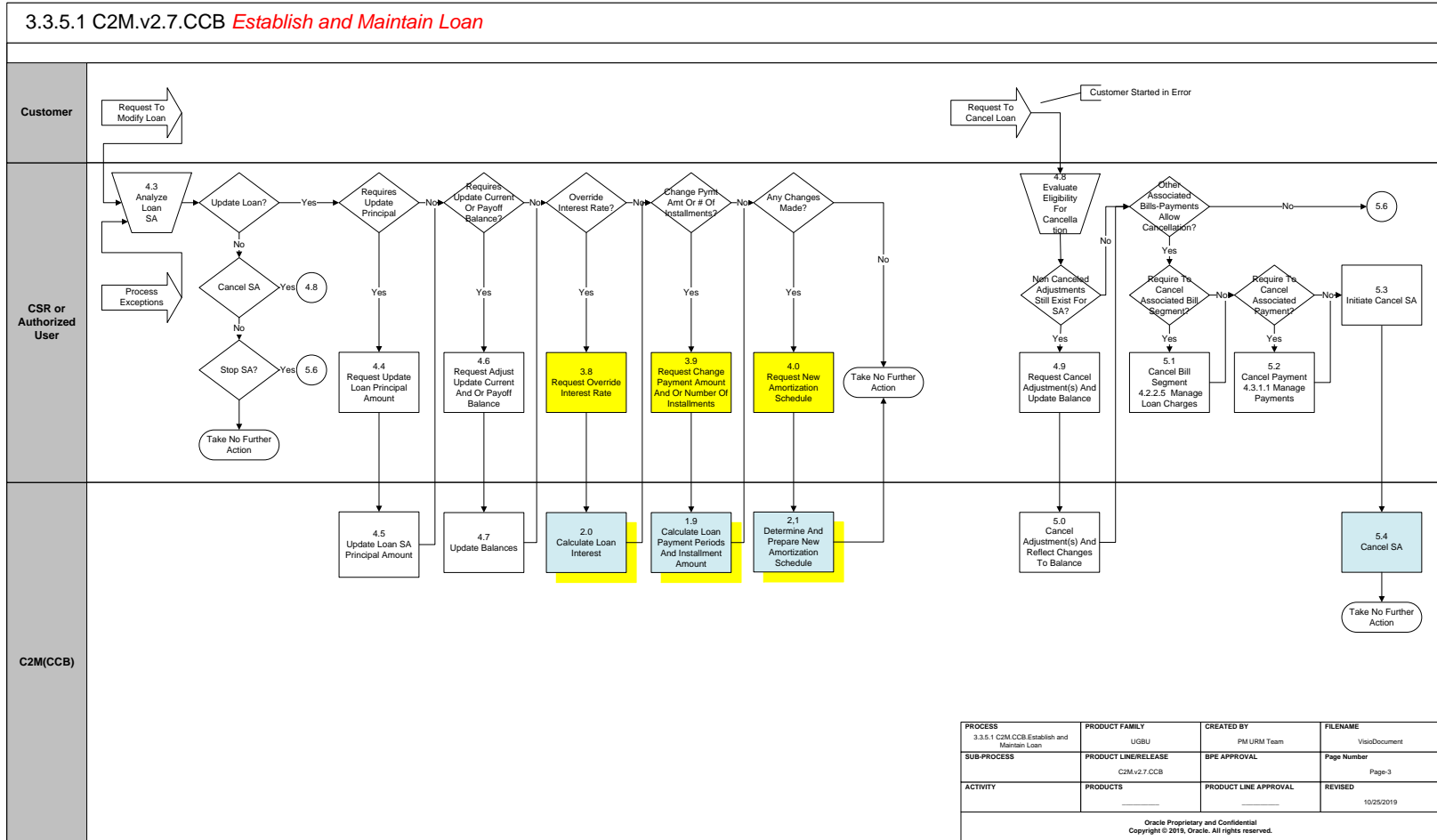
# Business Process Model Page 1



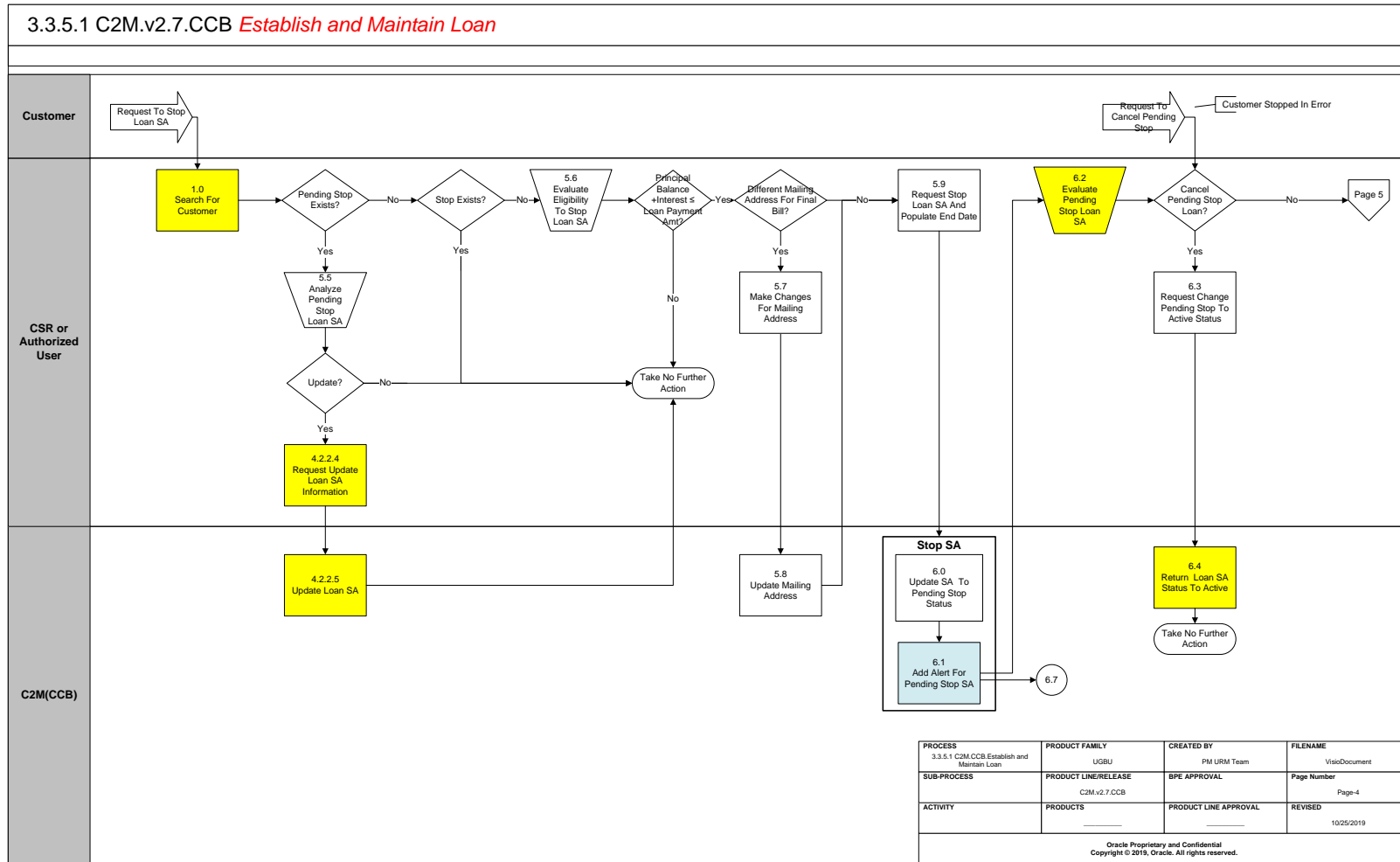
# Business Process Model Page 2



# Business Process Model Page 3

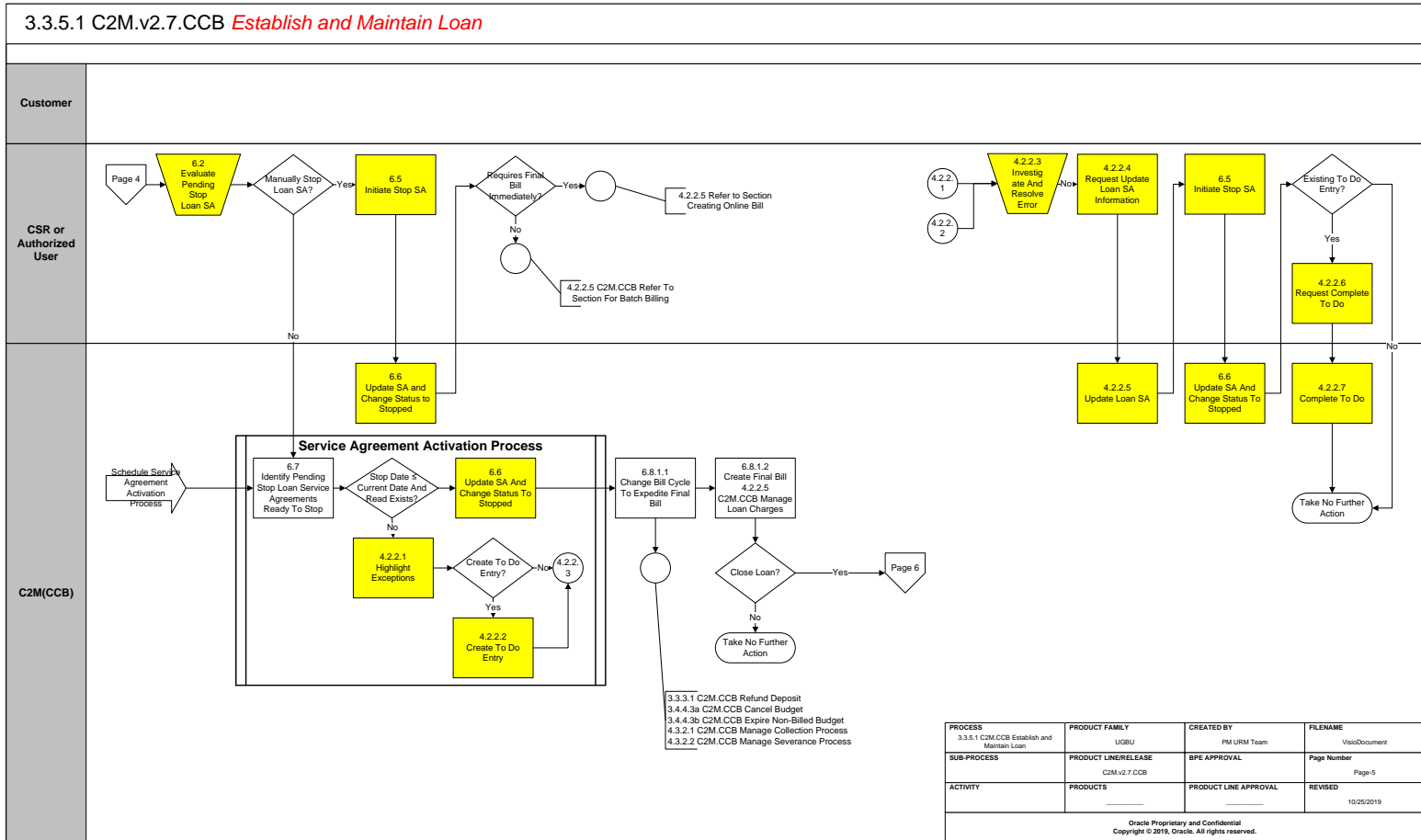


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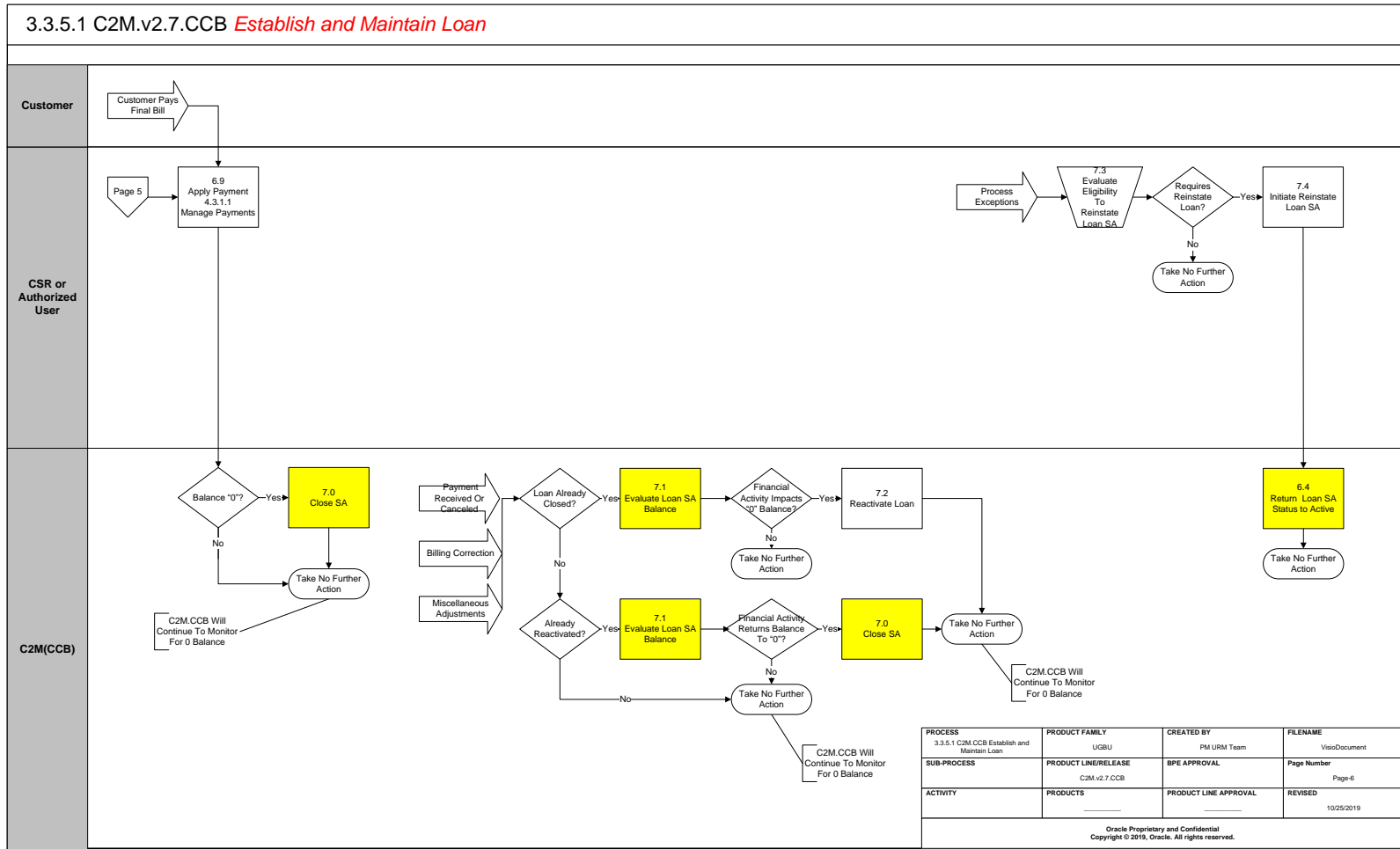




# Business Process Model Page 5



# Business Process Model Page 6



## Detail Business Process Model Description

### 1.0 Search for Customer

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

**Description:**

Upon receipt of request to Start or Stop a Loan, the CSR or Authorized User locates the existing customer in C2M(CCB) using [Control Central Search](#). When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central - Account Information refreshed with the selected customer's data. [Dashboard Alerts](#) provide the CSR or Authorized User with pertinent information for the customer including Pending Starts and Stops.

**Business Object Y**

**Business Object:**

C1-InstallationPerson - Installation Options - Person
---

**Process Plug-in enabled Y**

**Available Algorithm(s):**

PERS-INFO - Main name (alternate name) - phone number
---

NMFM-VALFMT- LAST,FIRST - This person name format validation algorithm validates a person's name contains a Name Separator Character.
--

**Configuration required Y**

**Entities to Configure:**

Installation Options
----------------------

### 1.1 Evaluate Eligibility Establish Customer And Loan

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

**Description:**

If the customer is not setup in C2M(CCB), the CSR or Authorized User investigates and reviews available information from other sources to determine if the customer is eligible for a loan with the organization. Eligibility is based on the individual organization's business rules and operating procedures.

### 1.2 3.3.1.1 Establish Person and/or Account Process

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

**Description:**

The customer requires establishing the Person and/or Account records in C2M(CCB). Refer to 3.3.1.1 C2M.CCB.Establish Person and/or Account Process. Once the customer is established and more information provided, the CSR or Authorized User may further evaluate in Step 1.3 or move directly to Step 1.4.

**1.3 Evaluate Customer Eligibility for Loan****Actor/Role:** CSR or Authorized User**Description:**

The existing customer or new customer is evaluated for loan eligibility. It is possible the organization may use an external credit agency to check credit of new or existing customers. The [Account Financial History](#), [Billing History](#), [Customer Contacts](#), and [Credit and Collection](#) History for existing customers may be reviewed. Each organization will have established business rules and operating procedures to confirm eligibility for a loan.

**1.4 Gather Details and Verify Loan****Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User verifies the Loan Service Agreement type that will be established for the customer. The interest rate, and payment amount and payment periods are confirmed prior to setup of the loan in C2M(CCB).

**Configuration required Y****Entities to Configure:**

SA Type
SA Start Option
Adjustment Type
Characteristic Type
Characteristic Value
Rate Schedule
Interest Bill Factor
Distribution Code
Frequency
Adjustment Type Profile

**1.5 Select Loan SA Type to Start****Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User populates the specific Loan SA Type for the given customer.

**Configuration required Y****Entities to Configure:**

SA Type
SA Start Option

**1.6 Populate Specific Data for Loan SA****Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User populates additional information required for the Loan SA Type. Start Option, payment periods or payment amount are additional fields to be completed.

**Configuration required Y**      **Entities to Configure:**

SA Type
SA Start Option

### **1.7 Override Standard Options**

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

**Description:**

Based on establish business rules, the CSR or Authorized User may change the start option, loan amount, payment periods or payment amounts for the [Loan Service Agreement](#).

**Configuration required Y**      **Entities to Configure:**

SA Type
SA Start Option

### **1.8 Request Loan Calculation:**

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

**Description:**

Once all required information is entered, the CSR or Authorized User requests to calculate payment periods, installment amount and interest amount.

### **1.9 Calculate Loan Payment Periods and Installment Amount**

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

**Description:**

Based on the [Loan](#) information entered, C2M(CCB) then calculates the number of periods and installment amount for the [Loan Service Agreement](#).

<p>LPDA-SI - This loan amortization period and payment amount algorithm is used for calculating the number of amortization periods or the fixed amortization amount for a simple interest loan.</p>
<p>LINT-SI - This loan interest charge algorithm calculates the interest charge (using simple interest only) for a loan service agreement for a particular bill period. The interest calculation is based on: 1) unbilled principal (i.e., the service agreement's payoff balance minus the current balance), 2) the number of billing periods covered by the bill, and 3) the</p>

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

interest rate.
----------------

**Configuration required Y**      **Entities to Configure:**

SA Type
SA Start Option

## 2.0 Calculate Loan Interest

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

**Description:**

Based on the Loan information entered, C2M(CCB) calculates the interest rate for the Loan Service Agreement. The interest rate may be overridden.

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

LINT-SI - This loan interest charge algorithm calculates the interest charge (using simple interest only) for a loan service agreement for a particular bill period.
--

**Configuration required Y**      **Entities to Configure:**

SA Type
SA Start Option
Rate Schedule

### 2.0.1 Request Start Loan SA

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

**Description:**

Once all required information is entered, the CSR or Authorized User confirms and initiates the start for the Loan Service Agreement.

### 2.1 Add Loan SA in Pending Start Status

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

**Description:**

The [Loan Service Agreement](#) is established in a Pending Start Status. If configured, a To Do entry can be created when the Loan Service Agreement is created.

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

New SA To Do - Create a To Do entry when a SA is added
--

**Configuration Y****Entities to Configure:**

To Do Type
To Do Role

**2.3 Add Pending Start SA Alert****Actor/Role:** C2M(CCB)**Description:**C2M(CCB) creates a Pending Start [Dashboard](#) Alert for informational and navigational purposes.**Process Plug-in enabled Y****Available Algorithm(s):**

C1_PENDST-DF - This control central alert algorithm highlights if the account in context has any pending start service agreement(s).
<a href="#">Installation Options - Control Central Alerts</a>

**Configuration Y****Entities to Configure:**

Installation Options
----------------------

**2.4 Confirm Start Information****Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User reviews and confirms that the Loan Service Agreement information is correct and processing can proceed.

**2.5 Request Add Bill Cycle to Account****Actor/Role:** CSR or Authorized User**Description:**

If the Account does not have a Bill Cycle associated with other Premise Based Service Agreements or requires changing of the bill cycle, the CSR adds or updates the Bill Cycle for the Account.

**Configuration required Y****Entities to Configure:**

Bill Cycle
Bill Cycle Schedule

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

The Bill Cycle for the Account is updated in C2M(CCB).

**Configuration required Y**      **Entities to Configure:**

Bill Cycle
Bill Cycle Schedule

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

There is dialogue with the customer. The CSR or Authorized User enters any new mailing address or other information. The system defaults to mailing premise. The CSR or Authorized User can change the default. C2M(CCB) address sources include Person, Premise, and Account. The address information is effective when the [Service Agreement](#) is activated.

**Configuration required Y**      **Entities to Configure:**

Postal Code Default
Installation Options
Bill Route Type
Country

**2.8 Update Start and Store Future Mailing Address****Actor/Role:** C2M(CCB)**Description:**

Changes in start information or mailing address is updated and stored in C2M(CCB).

**Configuration required Y**      **Entities to Configure:**

Postal Code Default
Installation Options
Bill Route Type
Country

**2.9 3.3.2.1 Start Premise Based Service****Actor/Role:** CSR or Authorized User**Description:**

It is possible there are other premise based services to start for the customer. Refer to 3.3.2.1 Start Premise Based Service.



### **3.0 Evaluate Pending Start Loan SA**

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

**Description:**

The CSR or Authorized User reviews the pending [start Loan Service Agreement](#). Prior to Service Agreement activation, it may be determined the Service Agreement needs to be updated, activated manually or canceled. The Customer may call and indicate they are not proceeding with the [Loan](#).

### **3.1 Request Activate Loan SA**

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

**Description:**

It is determined to manually activate the Loan Service Agreement. It may require immediate billing. Manual activation can be the result of processing an exception.

### **3.2 Update Loan SA and Change Status to Active Group: Service Agreement Activation**

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

**Description:**

The Loan Service Agreement is transitioned to an Active status in C2M(CCB). Activation is similar for manual or batch processing.

Manual Process: The CSR or Authorized User may transition the Service Agreement to Active as a result of exception processing.

Automated Process: C2M(CCB) will automatically transition the Service Agreement to Active status when all required information is made available.

**Customizable process N**

**Process Name**

SAACT - The service agreement activation process updates pending start and pending stop service agreements, when all required information is available.

### **3.3 Add Customer Contact**

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

**Description:**

The [Customer Contact](#) is added in C2M(CCB), if configured C2M(CCB) can automatically create a Customer Contact when Service Agreements are activated. C2M(CCB) creates a Dashboard Alert for the Customer Contact information and displays the last contact in the [Dashboard](#) Alert.

Manual Process: - The CSR or Authorized User can create a Customer Contact online based on established business rules.

Automated Process: - Based on configuration a Customer Contact can be created automatically.

**Process Plug-in enabled Y**

**Available Algorithm(s):**

SAAT-CC - Algorithm type SA Type -SA  
Activation - this algorithm creates a Customer Contact

**Configuration required Y**      **Entities to Configure:**

SA Type
Installation Options
Customer Contact Class
Customer Contact Type

### **3.4 Initiate Cancel for Pending Start Loan SA**

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

**Description:**

The CSR or Authorized User determines the [Loan Service Agreement](#) should not be started. There may be dialogue with the customer and the customer is not proceeding with the Loan.

### **3.5 Cancel Pending Start for Loan SA**

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

**Description:**

The Pending Start Loan Service Agreement is canceled in C2M(CCB). Since the Service Agreement was not started there is no record of the Service Agreement now in C2M(CCB).

### **3.6 Request Change Loan Amount**

**Actor/Role:** CSR

**Description:**

If the Service Agreement is still in Pending Start Status the Loan Amount may be changed. The CSR or Authorized User determines to change the Loan Amount.

### **3.7 Update Loan Amount**

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

**Description:**

The overall Loan Amount is updated in C2M(CCB).

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

<i>ADJT-TA - Payoff Amt = Adj / Current Amt = 0</i> FT algorithm. It creates a financial transaction for adjustments.
<i>ADJT-CA - Payoff Amt = 0 / Current Amt = Adj Amount (no GL)</i> FT algorithm . It creates a financial transaction for adjustments.
<i>ADJT-NM - Payoff Amt = Adj / Current Amt = Adj</i> FT

algorithm It creates a financial transaction for adjustments.
--

**Configuration required Y**      **Entities to Configure:**

Adjustment type
Adjustment type profile
Distribution codes

### **3.8 Request Override Interest Rate**

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

**Description:**

Based on established business rules, the configured interest rate may be overridden. This may be due to renegotiation of the [Loan](#) terms. The CSR or Authorized User changes the interest rate.

### **3.9 Request Change Payment Amount and/or Number of Installments**

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

**Description:**

Based on established business rules, the CSR or Authorized User determines to change the payment amount or number of installments. This may be due to renegotiation of the [Loan](#) terms.

### **4.0 Request New Amortization Schedule**

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

**Description:**

If the loan amount, interest rate, payment amount or number of installments has changed, the amortization schedule also needs to be updated to reflect the changes. The CSR or Authorized User requests this maintenance activity.

### **4.1 Identify Pending Start Service Agreements Ready for Activation Group: Service Agreement Activation**

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

**Description:**

The Service Agreement Activation background process, **SAACT**, periodically checks and selects Service Agreements with a Start Date less than or equal to the current date. This background process then attempts to transition the Service Agreement to Active.

**Manual Process:** The CSR or Authorized User may transition the [Service Agreement](#) to Active as a result of exception processing.

**Automated Process:** C2M(CCB) will automatically transition the Service Agreement to Active status when all required information is made available.

SAACT - SA Activation – activates and stops
---

<b>Customizable process N</b>	<b>Process Name:</b>	Service Agreements when all required information is available.
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**4.2.2.1 Highlight Exceptions Group: Service Agreement Activation**

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

**Description:**

The background process, **SAACT**, Service Agreement Activation, periodically checks to see if Service Agreements can be activated. C2M(CCB) creates an exception processing record for each Service Agreement with the Service Agreement’s effective start date less than the current date and with missing or incomplete information. The [Service Agreement](#) may also be manually activated. A separate background process creates To Do Entries for Pending Start/Stops that are older than a configured date. To Do Type and To Do Roles must also be configured.

<b>Customizable process N</b>	<b>Process Name:</b>	SAACT - SA Activation – activates and stops Service Agreements when all required information is available.
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**4.2.2.2 Create To Do Entry Group: Service Agreement Activation**

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

**Description:**

If configured, To Do Entries are created for exception processing. The exception is also available for viewing and resolution on a separate page in C2M(CCB).

<b>Customizable process N</b>	<b>Process Name:</b>	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.

<b>Configuration required Y</b>	<b>Entities to Configure:</b>	To Do Types
		To Do Roles

**4.2.2.3 Investigate and Resolve Error**

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

**Description:**

Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for the missing or incomplete information related to the Loan Service Agreement Activation. The CSR or Authorized User enters this information in C2M(CCB).

#### **4.2.2.4 Request Update Loan SA Information**

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

**Description:**

Once changes are made, the CSR or Authorized User saves information required to activate the [Loan Service Agreement](#) in C2M(CCB).

#### **4.2.2.5 Update Loan SA**

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

**Description:**

The Loan Service Agreement is updated in C2M(CCB).

#### **4.2.2.6 Request Complete To Do**

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

**Description:**

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

**Configuration required Y**      **Entities to Configure:**

To Do Role
To Do Type

#### **4.2.2.7 Complete To Do**

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

**Description:**

The To Do Entry is updated to Complete status in C2M(CCB).

**Configuration required Y**      **Entities to Configure:**

To Do Role
To Do Type

#### **4.3 Analyze Loan SA**

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

**Description:**

The Loan Service Agreement is evaluated and reviewed for any required updates or requests for renegotiation from the customer.

**4.4 Request Update Loan Principal Amount****Actor/Role:** CSR or Authorized User**Description:**

The adjustment functionality in C2M(CCB) is used if the CSR or Authorized User needs to make changes to the Loan Principal Amount after the Loan Service Agreement is Active. Based on established business rules, the CSR or Authorized User makes a change to the Loan Principal Amount. It is possible the business rules require the [Loan](#) be stopped or canceled and a new Loan started. These are also available options.

**4.5 Update Loan SA Principal Amount****Actor/Role:** C2M(CCB)**Description:**

The Loan principal amount is updated in C2M(CCB).

**4.6 Request Adjust Update Current and/or Payoff Balance****Actor/Role:** CSR or Authorized User**Description:**

Due to changing the principal amount or as a result of exception processing the CSR or Authorized User determines the current and/or payoff balance requires updating. The adjustment functionality in C2M(CCB) is used for the updates.

**Configuration required Y****Entities to Configure:**

Adjustment Type
Adjustment type profile

**4.7 Update Balances****Actor/Role:** C2M(CCB)**Description:**

The current and/or payoff balance is updated in C2M(CCB).

**Configuration required Y****Entities to Configure:**

Adjustment Type
Adjustment type profile

**4.8 Evaluate Eligibility for Cancellation****Actor/Role:** CSR**Description:**

At times a Loan Service Agreement requires cancellation. Typically this occurs when the [Loan Service Agreement](#) was created in error. As part of the cancellation process, the CSR or Authorized User determines if any associated financial transactions for the Active Service Agreement require cancellation. All financial transactions (bills, payments or adjustments) must be canceled before a Service Agreement can transition to Canceled status.

#### **4.9 Request Cancel Adjustment(s) and Update Balance**

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

**Description:**

The CSR or Authorized User cancels applicable adjustment(s) in order to cancel the Service Agreement. The Service Agreement balance is updated accordingly.

**Configuration required** Y

**Entities to Configure:**

Cancel Reason

#### **5.0 Cancel Adjustment(s) and Reflect Changes to Balance**

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

**Description:**

The Loan Service Agreement balance is updated in C2M(CCB) to reflect the adjustment cancellation.

**Configuration required** Y

**Entities to Configure:**

Cancel Reason

#### **5.1 Cancel Bill Segment 4.2.2.5 C2M(CCB) Manage Loan Charges**

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

**Description:**

Refer to 4.2.2.5 C2M(CCB) Manage Loan Charges for cancellation of Bill Segments.

#### **5.2 Cancel Payment 4.3.1.1 C2M(CCB) Manage Payments**

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

**Description:**

Refer to 4.3.1.1 C2M(CCB) Manage Payments for cancellation of Payments.

#### **5.3 Initiate Cancel SA**

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

**Description:**

When all financial transactions are canceled, the CSR or Authorized User changes the Service Agreement to Canceled.

#### **5.4 Cancel SA**

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

**Description:**

The Service Agreement is transitioned to a canceled status. Canceled is a final status. If configured, a To Do entry can be created when a [Service Agreement](#) is canceled.

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	SACA-CRTODO (Algorithm type) - Create To Do Entry when SA Canceled.
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<b>Configuration required Y</b>	<b>Entities to Configure:</b>	To Do Type
		To Do Role
		Cancel Reason

### **5.5 Analyze Pending Stop Loan SA**

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

**Description:**

A Pending Stop Loan Service Agreement exists. The CSR or Authorized User reviews and evaluates the existing Pending Stop to determine if updates are required.

### **5.6 Evaluate Eligibility to Stop Loan SA**

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

**Description:**

Normally the [Loan Service Agreement](#) is automatically stopped when the bill segment is generated for the last payment in the amortization schedule. It is possible the customer may pay off a loan before the full loan balance is due and may require a final bill immediately. The CSR or Authorized User determines the Loan can be stopped.

### **5.7 Make Changes for Mailing Address**

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

**Description:**

The CSR or Authorized User enters any changes in the mailing address for the final bill to be sent.

<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Postal Code Default
		Installation Options
		Bill Route Type
		Country

### **5.8 Update Mailing Address**

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

**Description:**

The mailing address is updated and stored in C2M(CCB).

### **5.9 Request Stop Loan SA and Populate End Date**



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

**Description:**

The CSR or Authorized User determines to stop the [Loan Service Agreement](#) as of a given or requested date.

### **6.0 Update SA to Pending Stop Status Group: Stop SA**

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

**Description:**

The [Loan Service Agreement](#) is updated to Pending Stop status in C2M(CCB).

### **6.1 Add Alert for Pending Stop SA Group: Stop SA**

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

**Description:**

C2M(CCB) creates a [Dashboard Alert](#) for the Pending Stop Loan Service Agreement.

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	C1-STOP-SA - Highlight Stop SA's
		<a href="#">Installation Options Control Central Alerts</a>

<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Installation Options
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### **6.2 Evaluate Pending Stop Loan SA**

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

**Description:**

The CSR or Authorized User reviews the pending stop Loan Service Agreement. It may be determined the request to stop the Loan needs to be canceled. The request to Stop the Loan was in error.

### **6.3 Request Change Pending Stop to Active Status**

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

**Description:**

The CSR or Authorized User enters the required information to return the Loan Service Agreement to Active status

### **6.4 Return Loan SA Status to Active**

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

**Description:**

The Loan Service Agreement is returned to an Active status in C2M(CCB).

**6.5 Initiate Stop SA****Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User manually transitions the Loan [Service Agreement](#) to Stopped in C2M(CCB).

**6.6 Update SA and Change Status to Stopped****Actor/Role:** C2M(CCB)**Description:**

The Service Agreement status is transitioned to Stopped in C2M(CCB).

Manual Process: The CSR or Authorized User may transition the Service Agreement to Stopped as a result of exception processing.

Automated Process: C2M(CCB) will automatically transition the Service Agreement to Stopped status when all required information is made available.

<b>Process Plug-in enabled</b> Y	<b>Available Algorithm(s):</b>	C1-SAIS-ST - This algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).
<b>Customizable process</b> N	<b>Process Name:</b>	SAACT - SA Activation The service agreement activation process updates pending start and pending stop service agreements.
<b>Configuration required</b> Y	<b>Entities to Configure:</b>	SA Type

**6.7 Identify Pending Stop Loan Service Agreements Ready to Stop Group: Service Agreement Activation Process****Actor/Role:** C2M(CCB)**Description:**

The Service Agreement Activation background process, **SAACT**, periodically checks and selects Service Agreements with a Stop Date less than or equal to the current date. This background process then attempts to transition the Service Agreement to Stopped.

<b>Customizable process</b> N	<b>Process Name</b>	SAACT - SA Activation The service agreement activation process updates pending start and pending stop service agreements.
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#### **6.8.1.1 Change Bill Cycle to Expedite Final Bill**

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

**Description:**

C2M(CCB) changes the bill cycle when the last Service Agreement for the account is stopped to allow for final bill creation. If other Active Service Agreements exist and the [Loan Service Agreement](#) is stopped, the final bill segment for the Loan will be created with the next regular bill for the customer.

#### **6.8.1.2 Create Final Bill 4.2.2.5 C2M(CCB) Manage Loan Charges**

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

**Description:**

The Batch Billing process creates the final bill for the Customer. Refer to 4.2.2.5 C2M(CCB) Manage Loan Charges for creation of the final bill for the Loan Service Agreement.

#### **6.9 Apply Payment 4.3.1.1 C2M(CCB) Manage Payments**

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

**Description:**

Refer to 4.3.1.1 C2M(CCB) Manage Payments for payment of the final bill for the Loan Service Agreement.

#### **7.0 Close SA**

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

**Description:**

The Service Agreement is automatically transitioned to Closed Status when the balance is "0".

#### **7.1 Evaluate Loan SA Balance**

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

**Description:**

When financial transactions are applied to the Closed Loan Service Agreement, C2M(CCB) evaluates the balance to determine if the Loan Service Agreement should be Reactivated. When financial transactions are applied to the Reactivated Loan Service Agreement, C2M(CCB) again evaluates the balance to determine if the Loan Service Agreement should be Closed.

#### **7.2 Reactivate Loan**

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

**Description:**

The Loan Service Agreement balance is no longer "0". The [Loan Service Agreement](#) is transitioned to a Reactivated status.

### **7.3 Evaluate Eligibility to Reinstate Loan SA**

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

**Description:**

At times it is necessary to reinstate a Loan SA and return the status to Active. The CSR or Authorized User reviews and gathers available information to reinstate the Loan Service Agreement.

### **7.4 Initiate Reinstate Loan SA**

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

**Description:**

The CSR or Authorized User initiates the Reinstate SA function.

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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
12/23/09	Colleen King		No Previous Document
10/20/10	Geir Hedman		Update Title and Content page
12/14/10	Ze'ev Lavee		Technical Updates
2/8/11	Geir Hedman		Update Document and Visio
12/1/13	Muhssin Suliman		Update document and Visio for V2.4
12/17/2013	Galina Polonsky		Reviewed, Approved
09/11/2017	Ekta Dua		Updated document and Visio for C2M
09/19/2017	Chetan Raut		Updated all Visio Diagrams/Attachments for C2M
10/26/2017	Galina Polonsky		Reviewed, Approved
05/29/2019	Satya Kalavala		Updated Format for v2.7

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## Attachments:

### Control Central Search



Control Central  
Search.docx

### Dashboard



Dashboard.docx

### Account Financial History



Account Financial  
History.docx

### Billing History



Billing History.docx

### Admin Menu Installation Options



Installation  
Options Alert Algori

## Loan Service Agreement



"Loan SA  
Notebook.doc"

## Customer Contact Notebook



"Customer  
Contact.doc"

## Account/Credit & Collection



Credit And  
Collection History.d

## Loan - Main



"Loan Main.doc"