C2M.v2.7.CCB

3.4.4 Manage Budget

Creation Date: February 2, 2012
Last Updated: February 11, 2020
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRIEF DESCRIPTION</td>
<td>4</td>
</tr>
<tr>
<td>BUSINESS PROCESS MODEL PAGE 1</td>
<td>5</td>
</tr>
<tr>
<td>BUSINESS PROCESS MODEL PAGE 2</td>
<td>6</td>
</tr>
<tr>
<td>TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS</td>
<td>7</td>
</tr>
<tr>
<td>DOCUMENT CONTROL</td>
<td>8</td>
</tr>
<tr>
<td>ATTACHMENTS:</td>
<td>9</td>
</tr>
</tbody>
</table>
**Brief Description**

**Business Process:** 3.4.4 C2M.CCB.Manage Budget  
**Process Type:** Process  
**Parent Process:**  
**Sibling Processes:**

It is a common practice for Organizations to offer their customers Budget Plans. There are two types of Budget Plans represented in this document: Budget Plan and Non-billed Budget Plan.  
**Budget Plan.** Providing budget billing service is a complex process that includes the following major steps: enroll customer in budget, monitor and true up budget, bill customer on budget, process budget payments, and cancel budget plan.  
**Non-Billed Budget Plan.** Process depicts major elements encompasses non-billed budget: enroll eligible customer in non-billed budget and set up scheduled payments, monitor and potentially renew scheduled payment, manage financial impact on current and pay-off balances: calculation charges for monitored and unmonitored Non-Billed budget plan (bills are not created for the Non-Billed Budget’s scheduled payment), process monitored and unmonitored non-billed payments.
Enroll In Budget

Review Non-Billed Budget

Expire Non-Billed Budget

Customer

CSR

CC&B

Request Enroll To Non-Billed Budget

Review Customer Eligibility To NBB

Request NBB SA

Deliberate Covered SA and Submit Recommendations

Request NBB SA

Review Customer Eligibility To NBB

Request NBB SA

Request For Analysis

Request Remove or Change NBB

Request Renew or Change NBB

Request NBB SA

Request Renew Non-Billed Budget

Update Accounts and NBB Adapter Information

Update Accounts and NBB Adapter Information

Distribute Credit to Covered SAs/Overpayment SA and Remove Scheduled Payments

Synch Current and Pay Off Balance

Stop Service Agreement

Stop NBB

Expire NBB

Distribute Credit to Covered SAs/Overpayment SA and Remove Scheduled Payments

Synch Current and Pay Off Balance

Severance Process

Expire NBB

Ship NBB

Ship NBB

Distribute Credit to Covered SAs/Overpayment SA and Remove Scheduled Payments

Synch Current and Pay Off Balance

Shop Service Agreement

Pay Off Balance

Severance Process

Expire NBB

Ship NBB

Ship NBB

Review Customer Eligibility for Renewal

Request Renew NBB SA

Calculate Payments, Schedule and Update NBB

Activate NBB SA

Activate NBB SA

Update Account and NBB Adapter Information

Calculate Payments, Schedule and Update NBB

Calculate Payments and Set Up Schedule

Request Activate NBB SA

Request Activate NBB SA
## 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>
<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>02/02/12</td>
<td>Becky Ray</td>
<td>V1.0</td>
<td>No Previous Document, Updates</td>
</tr>
<tr>
<td>02/28/2012</td>
<td>Galina Polonsky</td>
<td>V1.1</td>
<td>Reviewed</td>
</tr>
<tr>
<td>12/14/2013</td>
<td>Dean Davis</td>
<td></td>
<td>Update</td>
</tr>
<tr>
<td>02/18/2014</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>09/07/2017</td>
<td>Ekta Dua</td>
<td></td>
<td>Updated document and visio C2M</td>
</tr>
<tr>
<td>10/12/2017</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>06/05/2019</td>
<td>Satya Kalavala</td>
<td></td>
<td>Updated Format for v2.7</td>
</tr>
</tbody>
</table>
Attachments: