



C2M.v2.7.CCB

3.4.4.1a Enroll in Budget

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Brief Description

Business Process:	3.4.4.1a C2M.CCB.Enroll In Budget
Process Type:	Sub-process
Parent Process:	3.4.2. C2M.CCB.Develop Insight and Understanding
Sibling Processes:	3.4.4.2a C2M.CCB.Monitor and True Up Budget, 3.4.4.3a C2M.CCB.Cancel Budget, 4.2.2.10a C2M.CCB.Manage Budget Billing, 4.3.1.1a C2M.CCB.Process Budget Payments, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 3.3.2.1 C2M.CCB.Start Premise Based Service

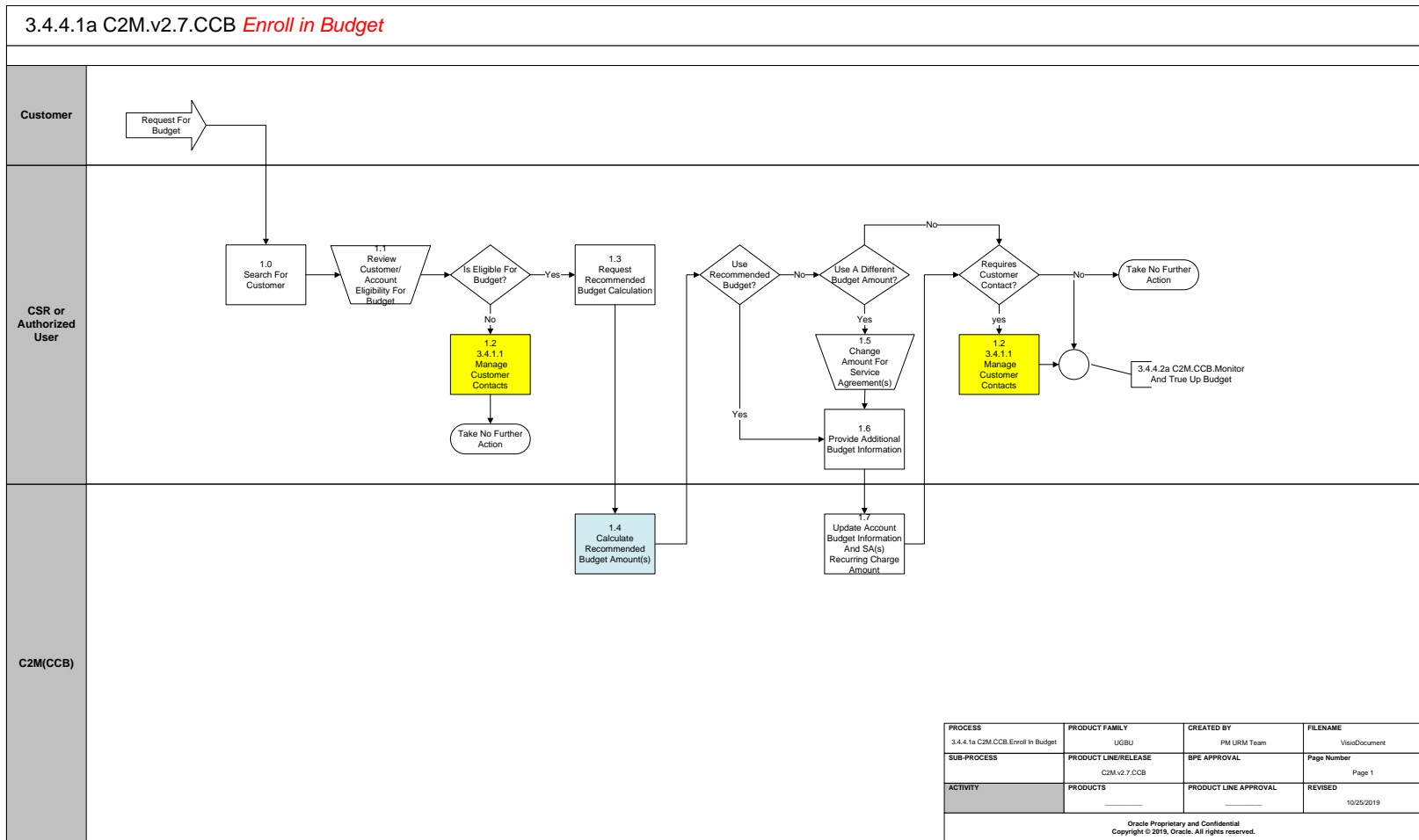
This process describes Enrollment to Budget Plan. A Budget Plan is a levelized payment plan used to spread out seasonal bill variations. It is a common practice for Organizations to offer their customers Budget Plans. A Service Agreement on a Budget has a fixed amount levied on a bill segment, regardless of actual utility charges. While overall the Account references a specific Budget Plan, each Service Agreement has an individual, unique Budget amount. The sum of an Account's Service Agreements' Budget amount is the Account's Budget amount.

Providing Budget Billing service is a complex process, and consists of several sub-processes. Together the processes represent the full lifecycle of Budget Plan functionality: Enrollment in Budget, Monitor and True Up Budget, Manage Budget Billing, Process Budget Payments, and Cancel a Budget.

The Budget Enrollment process allows the CSR or Authorized User to set up a Budget plan upon Customer request. The Customer's Account and Service Agreement(s) must satisfy established Business rules. As a part of enrollment in a Budget plan C2M(CCB) offers automatic Budget amount calculation. It supports negotiations with the Customer and simplifies the Budget enrollment process overall. Different [Budget Plans](#) may be used for various types of customers.

A Budget Plan may be set up for a Customer at time of Start Service, or at any time during the lifecycle of an active Service Agreement.

Business Process Model



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User or Authorized User

Description:

Upon receipt of request or inquiry for Budget, the CSR or Authorized User locates the customer in C2M(CCB) using [Control Central Search](#).

1.1 Review Customer/Account Eligibility for Budget

Actor/Role: CSR or Authorized User

Description:

There is dialogue with Customer. The CSR or Authorized User evaluates the account. Usually [Account Financial History](#), [Billing History](#), [Credit Rating](#), and [Credit and Collection History](#) are reviewed. It's recommended to review [Control Central Alerts](#) as well. Control Central Alerts provide the CSR or any Authorized User with valuable insight for overall analysis of the customer and assist in determining eligibility for Budget.

Process Plug-in enabled Y

Available Algorithm(s):

[Installation Options - Control Central Alerts](#)

1.2 3.4.1.1 Manage Customer Contacts

Actor/Role: CSR or Authorized User

Description:

Based on established Business Rules the CSR or Authorized User enters a Customer Contact to document Customer request. Refer to process 3.4.1.1 Manage Customer Contacts.

1.3 Request Recommended Budget Calculation

Actor/Role: CSR or Authorized User

Description:

If Customer is eligible for Budget, the CSR or Authorized User requests to calculate automatically the Recommended Budget Amount using the "Recommend" function on the Account/Budget page. C2M(CCB) allows automatic calculation for the recommended Budget amount for large Customers with more than 100 service Agreements. If more than 100 service agreements exist, a CSR or Authorized Personnel uses "Calculate and Apply" function to obtain the recommended Budget amount. Based on further discussion with the Customer, the CSR may use the recommended Budget amounts or make changes to some or all of the eligible Service Agreements.

1.4 Calculate Recommended Budget Amount(s)**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) calculates the recommended Budget amount for eligible SA's based on the Account's configured Budget Plan and provides CSR or Authorized User results of calculations for review and analysis.

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

C2M-CBUDCALC (alg type BUDCALC-BH) Calculate Budget using Average of last 6 months + 5%, round up to nearest \$50
C2M-RBUDCALC - Calculate Budget using Average of last 12 months + 5%
C2M-EBUDCALC (alg. Type BUDCALC-PH) Calculate Budget using Premise Bill History with estimated bills
C1-BUDG-ELIG - Budget Ineligible If SA Char Exists

Configuration required Y **Entities to Configure:**

Budget Plan,
Customer Class/Controls
SA Type

1.5 Change Amount for Service Agreement(s)**Actor/Role:** CSR or Authorized User**Description:**

During discussion with Customer, the CSR or Authorized User decides the recommended Budget amount cannot be used. He/she populates mutually agreed upon Budget amounts for each eligible Service Agreement.

1.6 Provide Additional Budget Information**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User follows established business rules and finalizes list of Service Agreements that participate in Budget plan, and updates all the Budget related details for eligible Service Agreement(s). See Account/Budget Page and Service Agreement/Recurring Charge Page to view details.

1.7 Update Account Budget Information and SA(s) Recurring Charge Amount**Actor/Role:** C2M(CCB)**Description:**

The Account Budget information is updated, and the individual [recurring charge effective date](#) and amounts are stored for each Service Agreement. If the Budget information is entered on the Start Service confirmation window, the system will populate the Budget information on the Account and update the effective date and [recurring charge amount](#) for the Service Agreement(s).

See also True Up process (3.4.4.2a Monitor and True Up Budget)

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
04/03/09	Colleen King		No Previous Document
04/29/09	Colleen King		Multiple changes - April
04/30/09	Galina Polonsky		Review
5/6/09	Colleen King		Updates
5/11/09	Colleen King		Updates
8/19/09	Colleen King		Updates after review
10/21/10	Geir Hedman		Update Title and Content page
11/30/10	Ze'ev Lavee		Technical Update Algorithms
2/8/11	Geir Hedman		Updated Document and Visio
8/2/13	Ahad G Abbasi		Updated for C2M(CCB) V2.4
08/16/13	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updates document and visio to v2.6
09/07/2017	James Foreman		C2M version created from CCB v2.4
09/18/2017	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7

Attachments:

Account/Budget



Account-Budget.doc

Service Agreement/Chars, Qty, & Rec Chg



Account-Budget-SA-
Recurring-Chg.doc

Admin Menu/Budget Plan



Budget Plan -
Residential.doc

Control Central Search



Control Central
Search.doc

Installation Option Control Central Alerts Algorithms



Installation Options
Control Central Alert .

Account Financial History



Account Financial
History.doc

Billing History



Billing History.doc

Credit and Collection History



Credit-Collection
History.doc