



## C2M.v2.7.CCB

### 3.4.4.2a Monitor and True Up Budget

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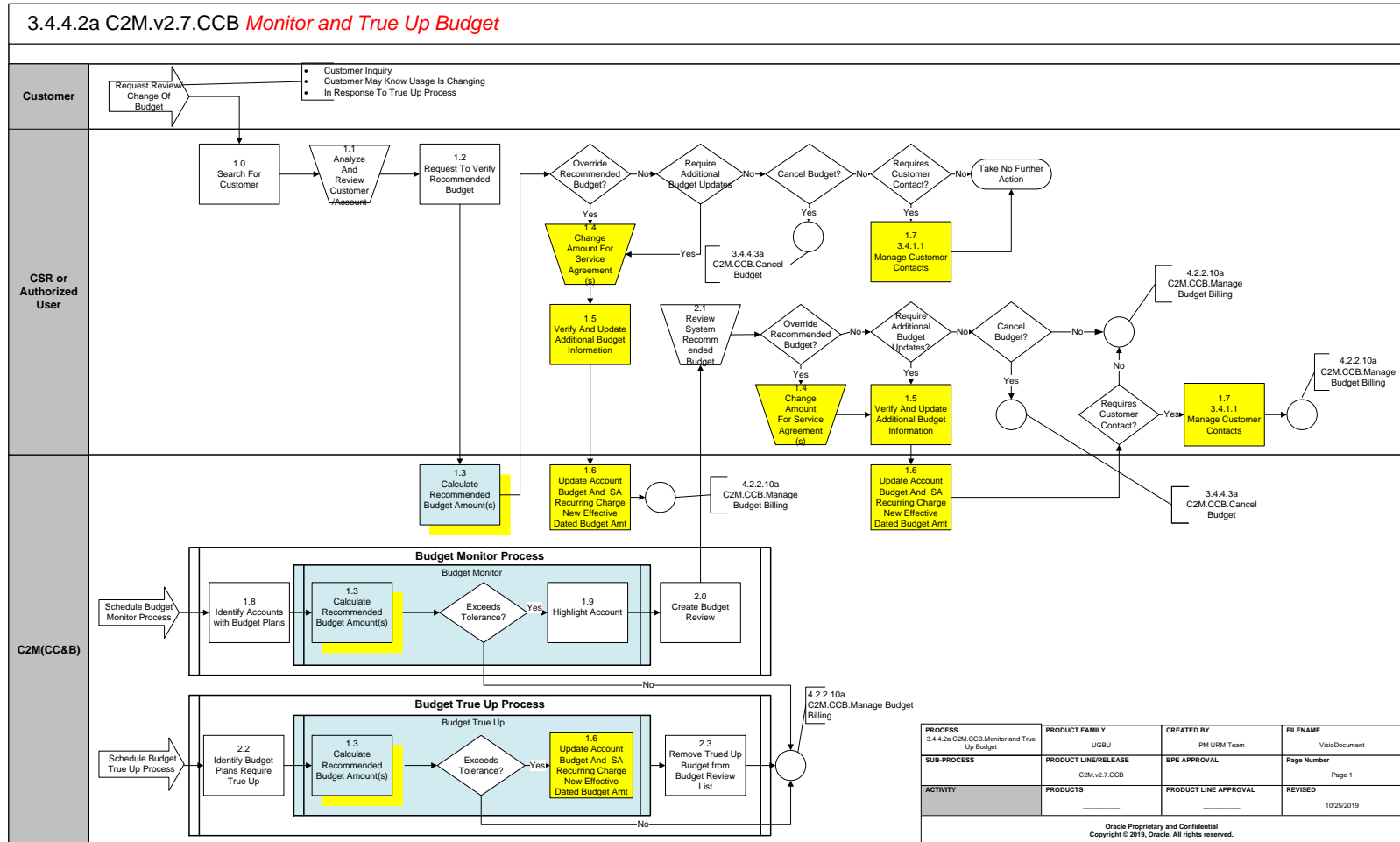
## Brief Description

**Business Process:** 3.4.4.2a C2M.CCB.Monitor and True Up Budget  
**Process Type:** Sub-process  
**Parent Process:** 3.4.2. C2M.CCB.Develop Insight and Understanding  
**Sibling Processes:** 3.4.4.1a C2M.CCB.Enroll in 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

Budget Plan is a levelized payment plan used to spread out seasonal bill variations. It is common practice for Organizations to offer their customers Budget Plans.

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. This process describes the steps required to Monitor and True Up existing Budget Plans. C2M(CCB) periodically monitors all existing Budget Plans and identifies those that require immediate attention. CSRs or Authorized Users may modify existing Budget Plans for Customers based on recommendations provided by C2M(CCB). Sometimes Customers initiate this process. The Customer may anticipate a change in consumption and want to recalculate the amount of the Budget. C2M(CCB) also periodically evaluates Budget Plans and performs automatic true up of Budget amounts based on established business rules. As a result of this process, the [Budget Plan](#) can be extended and /or original Budget amount can be changed. A Budget Plan may be canceled as a result of review /evaluation by CSR or Authorized User. A separate Cancel Budget process describes Budget cancellation in detail.

# Business Process Model



## Detail Business Process Model Description

### 1.0 Search for Customer

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

**Description:**

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

### 1.1 Analyze and Review Customer/Account

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

**Description:**

Following dialogue with the 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):

<a href="#">Installation Options – Control Central Alerts</a>
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### 1.2 Request to Verify Recommended Budget

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

**Description:**

The CSR verifies any recent updates made to Customer's Budget. The CSR or Authorized User requests automatic calculation/recalculation of the recommended Budget amount using the "Recommend" function on the [Account/Budget](#) tab. 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.

### 1.3 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 the CSR or Authorized User with the results of the calculations for review and analysis. This process could be initiated manually or automatically.

Manual Process: The CSR or Authorized User initiates the Process manually when processing Customer Request to verify or modify existing [Budget Plan](#).

Automated Process: C2M(CCB) performs calculations and provides CSR or Authorized User with results for review and analysis.

The automated process for Recommended Amount Calculation is a component of two automated standard processes:

- True Up Budget
- Monitor Budget

“Calculate Recommended Budget “ process is a flexible component of configurable and customizable methods:

- Budget Monitor Method (See 2.0 Budget Monitor for details)
- Budget True Up Method (See 2.4 Budget True Up for details)

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	C2M-CBUDCALC (alg type BUDCALC-BH) Calculate Budget using Premise Bill History with no estimated bills
		C2M-RBUDCALC (alg type BUDCALC-BH) Calculate Budget using Premise Bill History with no estimated bills
		C2M-EBUDCALC (alg. Type BUDCALC-PH) Calculate Budget using Premise Bill History with estimated bills
		C1-BUDG-ELIG - Budget Ineligible If SA Characteristic Exists
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	<a href="#">Budget Plan</a>
		Customer Class/Controls
		SA Type

**1.4 Change Amount for Service Agreement(s)**

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

**Description:**

The CSR or Authorized User may change the Budget amount for individual or all eligible Service Agreements dependent upon review and established business rules.

**1.5 Verify and Update Additional Budget Information**

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

**Description:**

After review and analysis of Customer’s Account and existing Budget Plan, the CSR or Authorized User updates the Budget Plan related information ([Service Agreement Recurring Charge](#), New Effective Date and associated Budget Amount for individual or all eligible Service Agreements).

**1.6 Update Account Budget and SA Recurring Charge New Effective Dated Budget Amt**

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

**Description:**

The [Account Budget](#) information is updated and the individual [recurring charge](#) effective date and amounts are also stored for each Service Agreement. This process may be part of manual or automated procedure.

Manual process: Account/Budget and Service Agreement Recurring Charge with new Effective Dated Budget Amount are updated upon CSR or Authorized User manual request.

These requests are results of:

- Manual Budget Review process
- Customer request to verify/modify Budget Amount.

Automated process:

- C2M(CCB) may automatically update Budget Plan as a part of Automated True Up Budget process.
- See 2.4 Budget True Up for details

The Budget True Up Process periodically updates customers on a Budget Plan. The system calculates the recommended Bbased on True Up algorithm and number of months defined on the [Budget Plan](#). C2M(CCB) will automatically change the Budget amount for the account and update the effective dated recurring charge information for each affected Service Agreement.

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	<p><b>C2M-CBUDTUP and C2M-RBUDTUP Alg Type:</b>  <b>BUDTUP-WTOL</b> This Budget true-up algorithm will change a customer's Budget amount if recommended Budget amount is more than X percent different from customer's current Budget amount (X is defined in Tolerance Percentage).</p>
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	<p>Budget Plan</p>
<b>Configuration required N</b>	<b>Process:</b>	<p>BUDTRUP True up budgets</p>



**1.7 3.4.1.1 Manage Customer Contact****Actor/Role:** CSR or Authorized User or Authorized User**Description:**

This process takes place when business rules require the CSR or Authorized User to enter data and store in C2M(CCB) all relevant information about a Customer Contact. The CSR or Authorized User enters necessary data. Refer to process 3.4.1.1 Manage Customer Contacts.

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

Customer Contact Class
Customer Contact Type

**1.8 Identify Accounts with Budget Plans Group: Budget Monitor Process****Actor/Role:** C2M(CCB)**Description:**

The first step of the [Budget Monitor](#) process runs periodically and is initiated by the Batch Scheduler. It identifies all accounts participating in Budget Plans.

**Customizable process: N**

Budget Monitor (BUDMON) - The Budget Monitor analyzes all customers with a Budget Plan and highlights those where the current Budget amount doesn't satisfy business requirements for Budget amount.
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**Business Object Y****Business Object:**

C1-BudgetPlanPhysicalBo - Physical BO for Budget Plan
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**1.9 Highlight Accounts Group: Budget Monitor Process Budget Monitor****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) executes this process for every Account with a Budget Plan. C2M(CCB) examines current the Budget amount and compares it with the recommended amount. If the Account's existing Budget amount is out-of-sync with predefined tolerance percentages, C2M(CCB) will highlight these Accounts.

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

Algorithms : C2M-RBUDMON and C2M-CBUDMON with Alg Type: <b>BUDMON-TOL</b> - This Budget monitor algorithm will highlight an account's Budget amount as out-of-sync if more than X percent different from current recommended Budget amount.
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**Customizable process:** N

[Budget Monitor](#) (BUDMON) - The Budget Monitor analyzes all customers with a Budget Plan and highlights those where the current Budget amount doesn't satisfy business requirements to Budget amount.

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

Budget Plan

**2.0 Create Budget Review Group: Budget Monitor Process.**

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

**Description:**

C2M(CCB) posts all the Accounts highlighted as "Required Review" in [Budget Review](#) List for CSR or Authorized User.

**Customizable process:** N

Budget Monitor (BUDMON) - The Budget Monitor analyzes all customers with a Budget Plan and highlights those where the current Budget amount doesn't satisfy business requirements to Budget amount.

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

Algorithms : C2M-RBUDMON and C2M-CBUDMON with Alg Type: **BUDMON-TOL** - This Budget monitor algorithm will highlight an account's Budget amount as out-of-sync if more than X percent different from current recommended Budget amount.

**2.1 Review System Recommended Budget**

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

**Description:**

The CSR or Authorized User reviews the Budget recommended by C2M(CCB) and may accept the recommended amount or use a different amount. Continuation of the process is similar to the manual Budget update.

## **2.2 Identify Budget Plans Require True Up Group: Budget True Up Process.**

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

### **Description:**

This is the first step of Budget True Up process runs periodically and is initiated by the Batch Scheduler. This process identifies all Budget Plans that require True Up. C2M(CCB) executes this process for every [Budget Plan](#). This process compares current and recommended Budget amounts and changes a customer's B amount if Account's existing Budget amount is out-of-sync with predefined tolerance percentages.

**Customizable process:** N

Budget True Up (BUDTRUP) - The Budget True Up process periodically performs true up on a Budget Plan

**Process Plug-in enabled:** Y

**Available Algorithm(s):**

**Algorithm:** C2M-CBUDTUP and C2M-RBUDTUP **Alg Type:** BUDTUP-WTOL This Budget true-up algorithm will change a customer's Budget amount if recommended Budget amount is more than X percent different from customer's current Budget amount (X is defined in Tolerance Percentage).

**Configuration required:** Y

**Entities to Configure:**

Budget Plan

**Business Object:** Y

**Business Object:**

C1-BudgetPlanPhysicalBo - Physical BO for Budget Plan

## **2.3 Remove Trued Up Budget from Budget Review List Group: Budget True Up Process**

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

### **Description:**

C2M(CCB) removes Accounts' Budget Plans from the [Budget Review](#) List if the True Up process automatically modifies the Budget (see Step 2.4 Budget True Up).

**Customizable process: N**

Budget True Up (BUDTRUP) - The Budget True Up process periodically performs true up on a Budget Plan

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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
4/3/09	Colleen King	Draft .1	No Previous Document
			Multiple Changes in April
5/6/09	Colleen King		Multiple changes based on new formatting guidelines and business verbiage - recommendations from Galina
8/19/09	Colleen King		After Review
10/21/10	Geir Hedman		Updated Title and Content page
11/30/10	Ze'ev Lavee		Technical Update Algorithms and Batch process
2/8/11	Geir Hedman		Updated Document and Visio
8/5/13	Ahad G.Abbasi		Updated for CC&B v2.4
09/14/13	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated doc and visio to v2.6
09/19/2017	James Foreman		Updated algorithms for C2M
09/28/2017	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7

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## Attachments:

### Account/Budget



Account-Budget.doc

### Service Agreement/Chars, Qty & Rec Charges



Account-Budget-SA-  
Recurring-Chg.doc

### Admin Menu/Budget Plan



Budget Plan -  
Residential.doc

### Control Central Search



Control Central  
Search.doc

### Admin Menu/Installation Options



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