C2M.v2.7.CCB

3.4.4.2b Renew Non-Billed Budget

Creation Date: February 22, 2009

Last Updated: February 11, 2020

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Contents

Brief Description

Business Process: **3.4.4.2b C2M.CCB.Renew Non-Billed Budget**
Process Type: **Sub Process**
Parent Process: **3.4.2 C2M.CCB.Develop Insight and Understanding**
Sibling Processes: **4.3.1 C2M.CCB.Perform Settlement Activities, 4.1.1.4 C2M.CCB.Develop Arrears Procedures, 4.2.2 C2M.CCB.Manage Bill, 3.4.1 C2M.CCB.Manage Contacts, 3.3.2.2 C2M.CCB.Start Non-Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non-Premise Based Service**

This process describes the activities associated with updating as well as renewal for a Non Billed Budget.

A Non-Billed Budget can be renewed either manually or via a background process. When the Non-Billed Budget SA is created, the expiration date, renewal date and the Recommendation Rule used to create the initial budget are kept with the SA. A renewal flag on the Non-Billed Budget SA type controls if a renewal is required, optional or not allowed. The renewal date is defaulted on to an SA based on the valued of the Days Before Expiration for Renewal field on the SA type.

An algorithm on the SA type can customize the processing required to renew an SA.

A user can manually launch the renewal process by clicking Renew on the Non-Billed Budget maintenance page.

Business Process Model

3.4.4.2b C2M.v2.7.CCB *Renew Non-Billed Budget*

Customer

Request For Renewal/Change

Request For Autopay

CSR or Authorized User

- 1.1 Search For Customer
- 1.2 Review Customer /Account Eligibility/ Renewal
- Is Budget Eligible For Renew? — Yes
- 1.4 Review – Verify Non Billed Budget Information
- 1.6 Request Renew
- Override Renew Information? — Yes
- 2.0.2 Update NBB Information
- No
- Request Autopay? — No
- 4.3.1.1a C2M.CCB.Process Budget Payments
- Requires Customer Contact? — No → Take No Further Action
- 1.5 Determine Covered Service Agreements
- Yes
- Is Customer Enrolled In Autopay? — Yes → 2.0.2.4 Update NBB Autopay Information
- No
- 1.3 3.4.1.1 Manage Customer Contacts
- 2.0.2.2 4.3.1.1c Process Non-Billed Unmonitored Budget Payments

C2M(CCB)

Non-billed Budget SA Renewal
- 1.7 Calculate Payments
- 1.8 Set Payment Schedule/Update NBB With Specific Defined Rules
- 1.9 Update Existing NBB With New Effective Period
- 2.0 Create Customer Contact

- 2.0.2.1 Update NBB Information
- 2.2.2.3 Update Account Autopay Information
- 2.0.2.5 Update NBB Autopay Information
- 4.3.1.1a C2M.CCB.Process Budget Payments

Schedule Renewal Date

Automated Non Billed Budget Renewal Process
- 2.1 Evaluate Eligibility For Renewal
- Require Renew Of NBB? — Yes
- **Non-billed Budget SA Renewal**
  - 1.7 Calculate Payments
  - 1.8 Set Payment Schedule/Update NBB With Specific Defined Rules
  - 1.9 Update Existing NBB With New Effective Period
  - 2.0 Create Customer Contact
- 2.0.1 Create Letter for NBB Renewal
- No → Take No Further Action
- 1.3 3.4.1.1 Manage Customer Contacts

PROCESS 3.4.4.2b C2M.CCB.Renew Non-Billed Budget	PRODUCT FAMILY UGBU	CREATED BY PM URM Team	FILENAME VisioDocument
SUB-PROCESS	PRODUCT LINE/RELEASE C2M.v2.7.CCB	BPE APPROVAL	Page Number Page-1
ACTIVITY	PRODUCTS _____	PRODUCT LINE APPROVAL	REVISED 10/25/2019

Detail Business Process Model Description

1.1 Search for Customer

Actor/Role: CSR or Authorized User

Description:

Upon receipt of request for renewal or inquiry for Non Billed Budget Billing the CSR or Authorized User accesses Control Central Search to locate the customer in C2M(CCB). There are a number of algorithms that can be stored on Installation Options for Control Central Alerts. These algorithms provide the CSR or Authorized User with valuable insight for overall analysis of the customer.

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

Installation Options – Control Central Alerts

1.2 Review Customer/Account Eligibility/Renewal

Actor/Role: CSR or Authorized User

Description:

There is dialogue with Customer. The CSR or Authorized User evaluates the account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts assist the CSR or Authorized User in determining continued eligibility based on established business rules for Non Billed Budget.

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

Installation Options – Control Central Alerts

1.3 3.4.1.1 Manage Customer Contacts

Actor/Role: CSR or Authorized User

Description:

Associated with established Business Rules the CSR or Authorized User enters necessary information about the Non Billed Budget Plan for the Customer. Refer to 3.4.1.1. Manage Customer Contacts

Configuration required Y   **Entities to Configure:**

Customer Contact Class, Customer Contact Type

1.4 Review – Verify Non Billed Budget Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User has dialogue with the customer and reviews the past Non Billed Budget information. The account may have more than one Non-Billed Budget SA.

1.5 Determine Covered Service Agreements
Actor/Role: CSR or Authorized User
Description:
All SA's configured as eligible for Non Billed Budget will be listed. The CSR or Authorized User confirms the Service Agreements to be considered for Non Billed Budget.

1.6 Request Renewal
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User requests renewal of the Non-Billed Budget.

1.7 Calculate Payments
Actor/Role: C2M(CCB)
Description:
The SA renewal algorithm for the Non-Billed Budget SA type is called and determines the current Recommendation Rule and executes the associated payment schedule algorithm. The C2M(CCB) base package only handles service-point related SA's.

Process Plug-in enabled Y	**Available Algorithm(s):**	SARN-NB - Determines the current Recommendation Rule for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule. NBDA-DA – this algorithm type calculates the Average Daily Amount.
Configuration required Y	**Entities to Configure:**	Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB
Business Object Y	**Business Object:**	C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule

1.8 Set Payment Schedule/Update NBB with Specific Defined Rules
Actor/Role: C2M(CCB)
Description:
The Recommendation Rule establishes the amount to be paid and payment due dates. Rounding Rule, Rounding Unit, Day of Month, # of Payments, True Up Rule for outstanding balances are included as parameters of the recommendation rule. The Non-Billed Budget Payment Schedule algorithm generates a recommended payment schedule for a Non-Billed Budget. The expiration and renewal dates are also calculated.

Customizable process N	**Process Name:**	SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date).
Process Plug-in enabled Y	**Available Algorithm(s):**	SARN-NB - Determines the current recommendation rule for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule. NBPS-MON or NBPS-PS - algorithm type is used to generate payment schedule and to establish other specific defined parameters. .
Configuration required Y	**Entities to Configure:**	Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB
		To do Type TD-SARN SA renewal error – Created when the batch process SARENEW has an error

1.9 Update Existing NBB with New Effective Period
Actor/Role: C2M(CCB)
Description:
If the Non-Billed Budget is configured for renewal, it is updated with a new effective renewal and expiration dates.

Process Plug-in enabled Y	Available Algorithm(s):	NBPS-MON or NBPS-PS algorithm - The new schedule is appended to the Non-Billed Budget SA and the renewal and expiration dates are updated accordingly.

Configuration required Y	Entities to Configure:	Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB

2.0 Create Customer Contact
Actor/Role: C2M(CCB)
Description:
If configured, a customer contact will be created automatically.

Process Plug-in enabled Y	Available Algorithm(s):	SARN-NB – in addition to described above this algorithm. If a Customer Contact Class and Customer Contact Type are specified, a customer contact is created and linked to the main person associated with the account.

Configuration required Y	Entities to Configure:	Customer Contact Class and Type

2.0.2 Update Non-Billed Budget Information
Actor/Role: CSR or Authorized User
Description:
Based on established Business Rules the CSR or Authorized User may override the payment schedule amounts or number of payments. The payment schedule may require updating based on a change to the start date or an expected up-front payment from the customer. Based on established Business Rules the CSR or Authorized User may change the expiration date or renewal date.

2.0.2.1 Update Non-Billed Budget Information
Actor/Role: C2M(CCB)
Description:
The Non-Billed Budget information is then updated in C2M(CCB).

2.0.2.2 4.3.1.1c Process Non-Billed Unmonitored Budget Payments
Actor/Role: CSR or Authorized User
Description:
Based on established business rules the CSR or Authorized User will gather autopay information from the customer and enter this information at the Account level.

2.0.2.3 Update Account Autopay Information
Actor/Role: C2M(CCB)
Description:
Autopay information is updated in C2M(CCB).

2.0.2.4 Update Non-Billed Budget Autopay Information
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User chooses the option to allow autopay for the Non-Billed Budget.

2.0.2.5 Update Non-Billed Budget Autopay Information
Actor/Role: C2M(CCB)
Description:

The Non-Billed Budget auto-pay information is updated in C2M(CCB).

2.0.1 Create Letter for Non-Billed Budget Renewal
Actor/Role: C2M(CCB)
Description:
If configured, C2M(CCB) will create a letter to be sent to the customer. A letter template is identified and associated with the Customer Contact Type.

Configuration required Y	**Entities to Configure:**	Letter Template and Template defined on associated Customer Contact Type

2.0.1.1 Extract Letter
Actor/Role: C2M(CCB)
Description:
The letter information is extracted in C2M(CCB) and sent to assigned software used to print the letter. There are various algorithms associated with different letter templates.

Process Plug-in enabled Y	**Available Algorithm(s):**	Various algorithms – two algorithm types included in base package are LTEXGEN – Generic Letter Extract, C1-LTREX-RPT – Create letter using reporting engine
Customizable process N	**Process Name:**	LTRPRT – Letter Extract - The customer contact letter download process creates the flat file(s) that are interfaced to your letter print software to print letters associated with letter-oriented customer contacts. This process extracts all customer contact records associated with its batch control ID that are marked with a supplied run number. If a run number is not supplied, the process uses all customer contact records associated with its batch control ID that are marked with the current run number.

Configuration required Y   **Entities to Configure:**

Letter Template includes identification of the Batch Control and Letter Extract Algorithms

2.0.1.2 Print Letter
Actor/Role: Document Management Software
Description:
The Letter is prepared and printed for the Customer.

2.0.1.3 Send Letter
Actor/Role: Document Management Software
Description:
The Letter is sent to the Customer.

2.0.1.4 Receives Letter
Actor/Role: Customer
Description:
The Customer receives the letter.

2.1 Evaluate Eligibility for Renewal
Actor/Role: C2M(CCB)
Description:
C2M(CCB) will review the Account's Non-Billed Budget Information and determine if the Active Non-Billed Budget is eligible for renewal.

Customizable process N   **Process Name:**

SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date).

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
2/22/09	Galina Polonsky	Draft 1a	No Previous Document
4/12/09	Colleen King		Multiple Changes in April
5/19/09	Colleen King		Updates per new guidelines
10/21/10	Geir Hedman		Updated Title and Content page
2/8/11	Geir Hedman		Updated Document and Visio
9/5/2013	Don Lee		Updated Document and Visio
9/20/2017	James Foreman		Updated algorithms
09/30/2017	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7

Attachments:

Account/Non-Billed Budget

"Non-Billed
Budget.doc"

Admin Menu/Non Billed Budget Recommendation Rule

"NBB
Recommendation Rule

Control Central Search

"Control Central
Search.doc"

Admin Menu/Installation Options

"Installation Options
Control Central Alert

Service Agreement after Stop

Service Agreement
after Stop.doc