



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

### **3.4.4.3a Cancel Budget**

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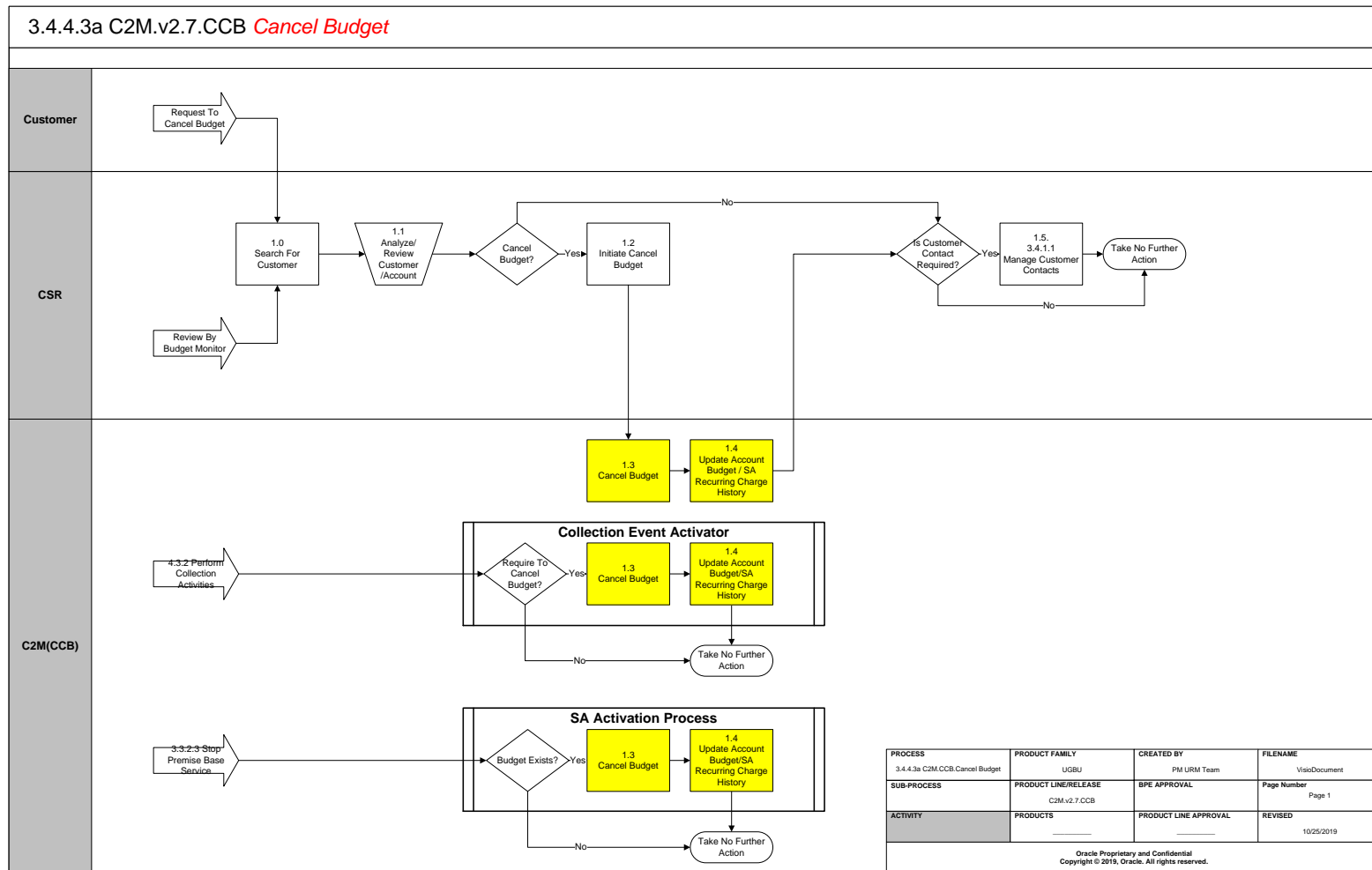
## Brief Description

**Business Process:** 3.4.4.3a C2M.CCB.Cancel 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.Enroll in Budget, 4.2.2.10a C2M.CCB.Manage Budget Billing, 4.3.1.1a C2M.CCB.Process Budget Payments, 4.3.2.1 C2M.CCB.Manage Collection Process, 3.4.1.1 C2M.CCB.Manage Customer Contacts,

This process describes the process used to cancel a [Budget Plan](#). The process can be initiated by:

- Customer Inquiry
- Collection Process Event
- Stop Service

# Business Process Model



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## Detail Business Process Model Description

### 1.0 Search for Customer

**Actor/Role:** CSR

**Description:**

Upon receipt of request or inquiry about canceling the Budget Plan the CSR or Authorized User accesses [Control Central Search](#) to locate the customer in C2M(CC&B). 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](#)

### 1.1 Analyze/Review Customer/Account

**Actor/Role:** CSR

**Description:**

There is dialogue with Customer. The CSR or Authorized User evaluates the account. [Account Financial History](#), [Billing History](#), [Credit Rating](#), and [Credit and Collection History](#) may be reviewed.

Process Plug-in enabled Y

Available Algorithm(s):

[Installation Options - Control Central Alerts](#)

### 1.2 Initiate Cancel Budget

**Actor/Role:** CSR

**Description:**

At [Account](#) level the CSR or Authorized User will cancel the Budget.

**1.3 Cancel Budget****Actor/Role:** C2M(CC&B)**Description:**

The Budget is canceled in C2M(CC&B). The system may cancel a Budget during a Collection Process (if the Collection Process contains a Cancel Budget Collection Event).

Manual Process: The CSR or Authorized User will cancel the Budget upon request or based on other established business rules.

Automated Process: If configured within Collection Process, the Collection Event Trigger will cancel a Budget.

<b>Customizable process N</b>	<b>Collection Event:</b>	The Collection Event Trigger -CET will activate a collection event to cancel the Budget
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Collection Event Type Adjustment Type
<b>Configuration required Y</b>	<b>Algorithms available:</b>	COLL COND BG - Check if account is on a budget

**1.4 Update Account Budget/SA Recurring Charge History****Actor/Role:** C2M(CC&B)**Description:**

When the Budget is canceled, any recurring charge with an effective date beyond the cancellation date is deleted. A new [recurring charge](#) amount of "0" is added for each affected Service Agreement. Each Service Agreement's Current Balance is synchronized with its payoff balance (using sync adjustment type defined on the Service Agreement's SA type). When a Service Agreement is stopped the Budget is canceled. Refer to 3.3.2.2 Stop Service.

Manual Process: When the CSR or Authorized User cancels the Budget, the Account's Service Agreement(s) Recurring Charge History, and Current Balance is updated.

Automated Process: When a covered Service Agreement is stopped the Budget is canceled. Recurring Charge History and Current Balance is updated.

**1.5 3.4.1.1 Manage Customer Contacts****Actor/Role:** CSR**Description:**

Associated with established Business Rules the CSR or Authorized User enters necessary information about the [Budget Plan](#) for the Customer. Refer to 3.4.1.1 Manage Customer Contacts.

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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
4/15/09	Colleen King		Multiple Changes in April
5/18/09	Colleen King		Changes based on new guidelines
8/20/09	Colleen King		After Review
10/21/10	Geir Hedman		Updated Title and Content page
11/30/10	Ze'ev Lavee		Technical Updates
2/8/11	Geir Hedman		Updated Document and Visio
8/7/13	Ahad G.Abbasi		Updated for CC&B v2.4
08/15/13	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated doc and visio to v2.6
09-19-2017	James Foreman		Updated algorithms
09/30/2017	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 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