Contents

BRIEF DESCRIPTION ............................................................................................................................... 4
BUSINESS PROCESS MODEL ...................................................................................................................... 5
DETAIL BUSINESS PROCESS MODEL DESCRIPTION ................................................................................ 6
TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS .......................................................... 8
DOCUMENT CONTROL ............................................................................................................................. 9
ATTACHMENTS: ....................................................................................................................................... 10
  Account/Budget ..................................................................................................................................... 10
  Service Agreement/Chats, Qty & Rec Charges ....................................................................................... 10
  Admin Menu/Budget Plan ...................................................................................................................... 10
  Control Central Search ......................................................................................................................... 10
  Admin Menu/Installation Options .......................................................................................................... 10
  Account Financial History ..................................................................................................................... 10
  Billing History ....................................................................................................................................... 11
  Credit and Collection History ............................................................................................................... 11
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

3.4.4.3a C2M.v2.7.CCB Cancel Budget

Customer
- Request for Cancel Budget

CSR
- Review Request for Budget
  - 1.0 Search For Customer
    - 1.1 Analyze/Contact Customer Account
      - Cancel Budget

C2M(CCB)
- Perform Collection Activities
  - 3.3.3.2 Stop Premise Base Service

Collection Event Activator
- Collection Event Activator
  - 1.3 Cancel Budget

SA Activation Process
- SA Activation Process
  - 1.4 Update Account
    - Budget/SA Recurring Charge History
  - Take No Further Action

PM URM Team
- Created By

Oracle Proprietary and Confidential
Copyright © 2019, Oracle. All rights reserved.
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):

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):

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.

<table>
<thead>
<tr>
<th>Customizable process</th>
<th>Collection Event:</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>The Collection Event Trigger - CET will activate a collection event to cancel the Budget</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Configuration required</th>
<th>Entities to Configure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Collection Event Type</td>
</tr>
<tr>
<td></td>
<td>Adjustment Type</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Configuration required</th>
<th>Algorithms available:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>COLL COND BG - Check if account is on a budget</td>
</tr>
</tbody>
</table>

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.
## 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>
<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>4/15/09</td>
<td>Colleen King</td>
<td></td>
<td>Multiple Changes in April</td>
</tr>
<tr>
<td>5/18/09</td>
<td>Colleen King</td>
<td></td>
<td>Changes based on new guidelines</td>
</tr>
<tr>
<td>8/20/09</td>
<td>Colleen King</td>
<td></td>
<td>After Review</td>
</tr>
<tr>
<td>10/21/10</td>
<td>Geir Hedman</td>
<td></td>
<td>Updated Title and Content page</td>
</tr>
<tr>
<td>11/30/10</td>
<td>Ze'ev Lavee</td>
<td></td>
<td>Technical Updates</td>
</tr>
<tr>
<td>2/8/11</td>
<td>Geir Hedman</td>
<td></td>
<td>Updated Document and Visio</td>
</tr>
<tr>
<td>8/7/13</td>
<td>Ahad G.Abbasi</td>
<td></td>
<td>Updated for CC&amp;B v2.4</td>
</tr>
<tr>
<td>08/15/13</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 doc and visio to v2.6</td>
</tr>
<tr>
<td>09-19-2017</td>
<td>James Foreman</td>
<td></td>
<td>Updated algorithms</td>
</tr>
<tr>
<td>09/30/2017</td>
<td>Galina Polonsky</td>
<td></td>
<td>Reviewed, Approved</td>
</tr>
<tr>
<td>06/03/2019</td>
<td>Satya Kalavala</td>
<td></td>
<td>Updated format for v2.7</td>
</tr>
</tbody>
</table>
Attachments:

Account/Budget

Service Agreement/Chars, Qty & Rec Charges

Admin Menu/Budget Plan

Control Central Search

Admin Menu/Installation Options

Account Financial History
Billing History

Credit and Collection History