



## C2M v2.9

### 3.4.4.1b Enroll in Non-Billed Budget

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## Brief Description

|                           |  |
|---------------------------|--|
| <b>Business Process:</b>  | <b>3.4.4.1b C2M.Enroll in Non-Billed Budget</b>  |
| <b>Process Type:</b>      | <b>Sub Process</b>   |
| <b>Parent Process:</b>    | <b>3.4.4 C2M.Manage Budget</b>   |
| <b>Sibling Processes:</b> | <b>4.3.1.1 C2M.Processing Payments, 4.3.3.1b C2M.Process Monitored Non-Billed Budget Payments, 4.3.3.1c C2M.Process Unmonitored Non-Billed Budget Payments, 4.2.2.10b C2M.Manage Monitored and Unmonitored Non-Billed Budget Billing, 3.4.1.1 C2M.Manage Contacts, 3.3.2.2. C2M.Start Non-Premise Based Service, 3.3.2.4 C2M.Stop Non-Premise Based Service, and 3.4.4.1a C2M.Enroll in Budget</b> |

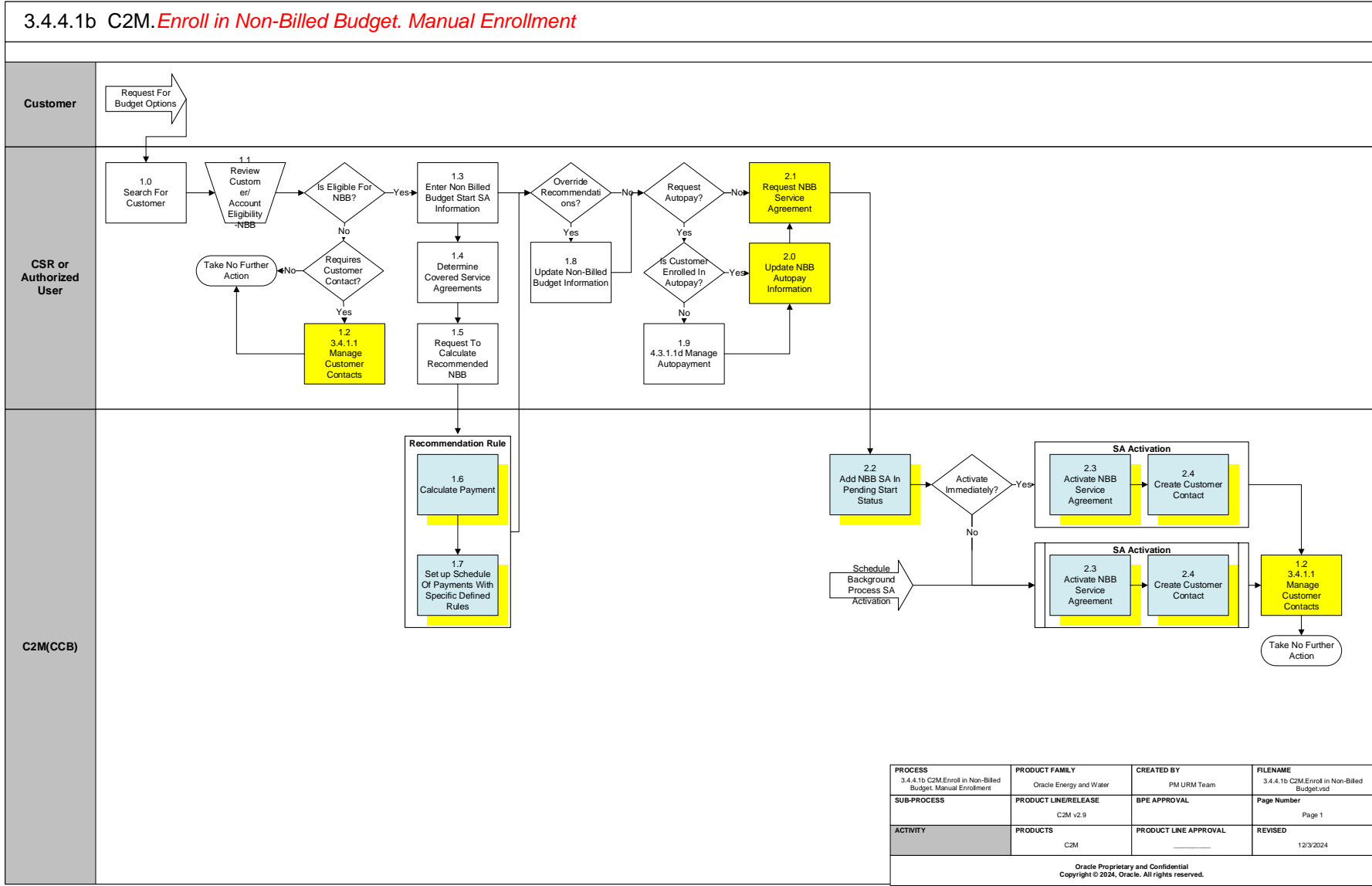
This process describes the [Non-Billed Budget](#) (NBB). It is a payment plan that allows customers to pay set amounts at specified intervals. Non-Billed budgets may be used when billing is infrequent and provides customers with a mechanism to make smaller payments more frequently. Bills are not created for the Non-Billed Budget's scheduled payment. Customers may have a payment coupon book, however must remember to make payments at the scheduled intervals.

A Non-Billed Budget is a special type of budget or payment plan that encompasses three major elements:

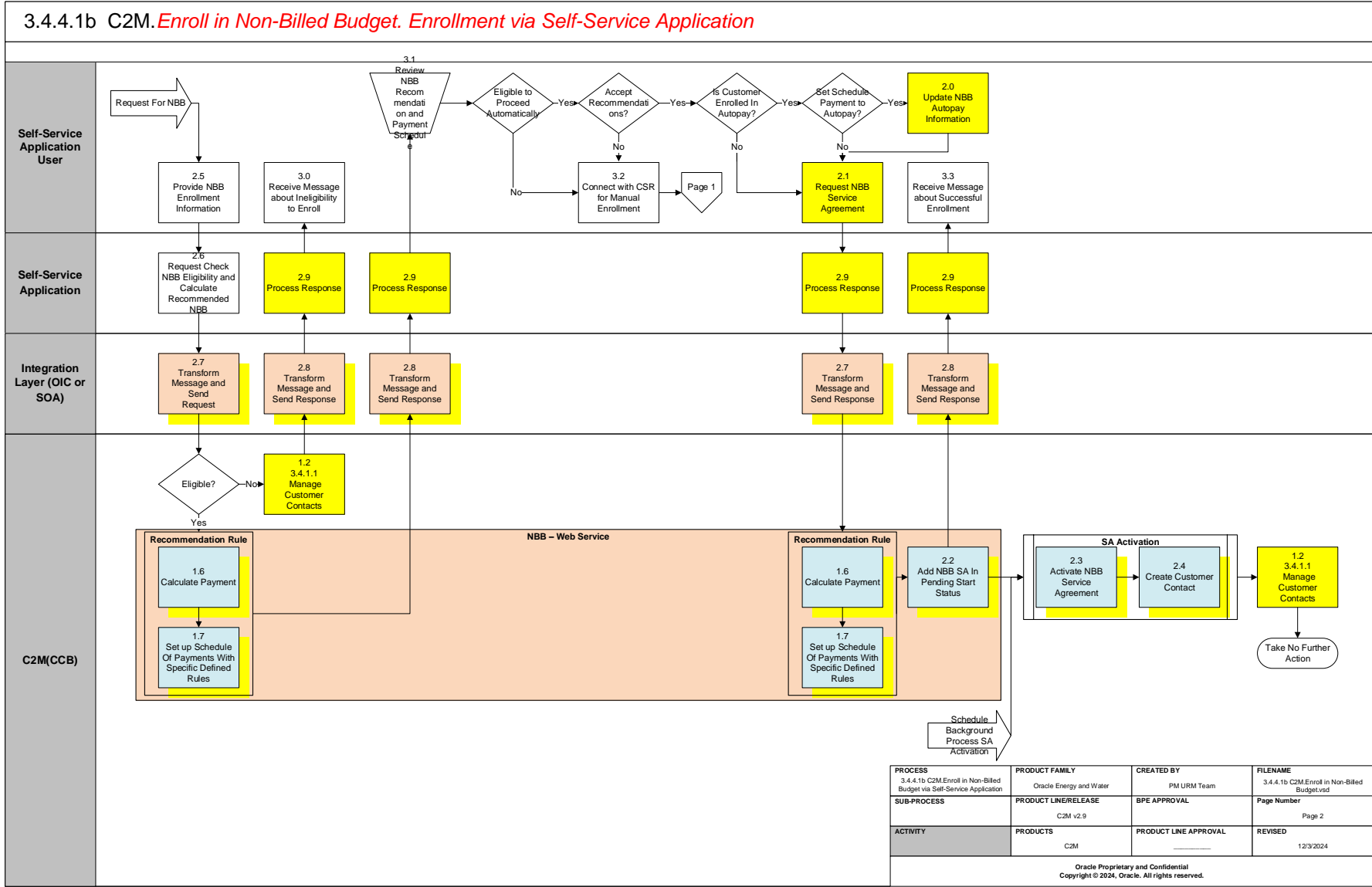
- A set of scheduled payments
- The business rules used to recommend and potentially renew the payment schedule
- The business rules that govern the financial impact on the current and payoff balances of the SAs covered by the payment schedule

The process is triggered when the customer contacts the organization requesting Budget plan options or from a self-service application. Based on established business rules, the CSR or Authorized User then decides to create a Non-Billed Budget for the customer.

Business Process Model Page 1



Business Process Model Page 2



## Detail Business Process Model Description

### 1.0 Search for Customer

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

**Description:**

Upon receipt of request or inquiry for [Non Billed Budget](#) Billing the CSR or Authorized User accesses Control Central Search to locate the customer in C2M(CCB).

### 1.1 Review Customer/Account Eligibility NBB

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

**Description:**

Following dialogue with the customer the CSR or Authorized User evaluates the account. This may involve review of Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History. Control Central Alerts assist the CSR or Authorized User in determining eligibility for Non Billed Budget options based on established business rules.

**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:**

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:**

|                                  |
|----------------------------------|
| Letter Template and Template     |
| Customer Contact Class           |
| Customer Contact Type            |
| Customer Contact Characteristics |

### 1.3 Enter Non-Billed Budget Start SA Information

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

**Description:**

The CSR or Authorized User selects a CIS Division, the Non Billed Budget SA Type, and enters a date, if different than the default date. The SA Type defines whether this is a monitored or unmonitored Budget. The CSR or Authorized User selects the Recommendation Rule to populate the parameters for the [Non Billed Budget](#). The CSR or Authorized User may override the start date, and parameters of the Non Billed Budget.

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

|              |
|--------------|
| CIS Division |
|--------------|

|                         |
|-------------------------|
| SA Type                 |
| NBB Recommendation Rule |

**1.4 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.

**1.5 Request to Calculate Recommended NBB**

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

**Description:**

C2M (CCB) calculates the recommended [Non Billed Budget](#) Amount(s) for eligible SA’s based on the configured [Recommendation Rule](#). The Recommendation Rule includes rounding rules, day of month for payment, number of payments and true up rules. The average daily amount algorithm NBDA-DA, and the payment schedule algorithm NBPS-MON or NBPS-PS are defined.

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

|   |
|---|
| Recommendation Rule Algorithms - Non Billed Budget <a href="#">Recommendation Rule</a> – Average Daily Amount-NBDA-DA; and Payment Schedule – NBPS-MON or NBPS-PS to define monthly or Pay Periods in Days. |
|---|

**Configuration required Y      Entities to Configure:**

|   |
|---|
| Non Billed Budget <a href="#">Recommendation Rule</a> |
| SA Type   |

**1.6 Calculate Payments Group: Recommendation Rule**

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

**Description:**

The [Recommendation Rule](#) establishes the amount to be paid and payment due dates. The algorithm type supplied with the base package only handles service-point related SA’s. The Recommendation Rule has parameters to define a rounding rule, rounding unit, day of month, number of payments, and true up rule for outstanding balances. A NBB Adjustment may be create to show transferred amounts.

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



|                          |                        |  |
|--------------------------|------------------------|--|
|                          | Scripts(s):            | NBDA-DA Algorithm type - use Use Premise History NBB <a href="#">Recommendation Rule</a> - Average Daily Amount with the following algorithms:<br>NBDA-DA-10 NBB Daily Amount Calculation with 10 Percent Adjustment<br>NBDA-DA - NBB Daily Amount Calculation with Zero Adjustment<br>NBBA3090 - NBB Avg Daily \$ Amount + 30% - 90 Day History |
|                          |                        | NBPS-MON Algorithm type: Generates <a href="#">a recommended Rule for monthly payment</a> schedule for a non-billed budget   |
|                          |                        | NBPS-PS Algorithm Type: generates a <a href="#">recommended Rule payment schedule</a> for a non-billed budget SA where the interval between payments is in a specified number of days.   |
| Configuration required Y | Entities to Configure: | C1NBBAAdd - Non Billed Budget - Add  |
|                          |                        | C1NBBRead - Non Billed Budget - Read   |
|                          |                        | C1NBBAUpdate - Non Billed Budget - Update  |
| Customizable process Y   | Process Name:          | Non Billed Budget <a href="#">Recommendation Rule</a>  |
|                          |                        | SA Type  |
|                          |                        | Adjustment Type (for NBB)  |
|                          |                        | Custom Process   |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

**1.7 Set up Schedule of Payments and Update Non-Billed Budget with Specific Defined Rules Group: Recommendation Rule**

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

**Description:**

The payment schedule is established in C2M(CCB) based on the parameters of the [Recommendation Rule](#) as described in the previous step.

|                           |                         |  |
|---------------------------|-------------------------|--|
| Configuration required Y  | Entities to Configure:  | SA Type  |
|                           |                         | Adjustment Type (for NBB)                          |
| Process Plug-in enabled Y | Available Algorithm(s): | NBPA-PS Algorithm type - create an adjustment to a |

|                        |                  |  |
|------------------------|------------------|--|
|                        |                  | non-billed budget SA to reflect the value of the scheduled payment. with the following algorithm:<br>NBPA-PS |
| Scripts(s):            |                  |  |
|                        |                  | C1NBBAdd - Non Billed Budget - Add   |
|                        |                  | C1NBBRead - Non Billed Budget - Read   |
|                        |                  | C1NBBUpdate - Non Billed Budget - Update   |
| Business Object Y      | Business Object: |  |
|                        |                  | C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule   |
| Customizable process Y | Process Name:    |  |
|                        |                  | Custom Process   |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

**1.8 Update Non-Billed Budget Information.**

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

**Description:**

Based on established Business Rules, the CSR or Authorized User may change 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. The expiration date or renewal date may also be changed.

**1.9 4.3.1.1d Manage Autopayment**

**Actor/Role:** CSR

**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 Update Non-Billed Budget Autopay Information**

**Actor/Role:** CSR or Authorized User/ Self-Service Application User

**Description:**

The CSR/Self-Service Application User chooses the option to allow Autopay for the [Non-Billed Budget](#).

**2.1 Request Non-Billed Budget Service Agreement**

**Actor/Role:** CSR or Authorized User/ Self-Service Application User

**Description:**

The CSR/Self-Service Application User reviews the NBB entered information and saves this information.

**2.2 Add Non-Billed Budget SA in Pending Start Status**

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

**Description:**

The Non-Billed Budget Service Agreement is added in a Pending Start status. The SA Activation Background Process will activate the Service Agreement the next time it is executed, unless the SA Type is configured to activate immediately. Depending on SA Type started the [Non Billed Budget](#) may be monitored by the Credit and Collection processes in C2M(CCB).

|                           |                         |  |
|---------------------------|-------------------------|--|
| Process Plug-in enabled Y | Available Algorithm(s): | <div>SACR-AT – automatically activate service agreements</div> <div>NEW SA TODO - creates a To Do entry when a Service Agreement is created</div>    |
|                           | Scripts(s):             | <div>C1NBBAAdd - Non Billed Budget - Add</div> <div>C1NBBSRead - Non Billed Budget - Read</div> <div>C1NBBSUpdate - Non Billed Budget - Update</div> |
| Customizable process N    | Process Name            | <div>SAACT – SA Activation Background Process activates Pending Start Service Agreements when all information is available.</div>                    |
| Configuration required Y  | Entities to Configure:  | <div>SA Type</div>   |
| Customizable process Y    | Process Name:           | <div>Custom Process</div>  |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

**2.3 Activate Non-Billed Budget Service Agreement Group: SA Activation**

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

**Description:**

If the algorithm SACR-AT is defined for the SA Type, the Service Agreement will be activated immediately. Depending on SA Type started the [Non Billed Budget](#) will be monitored or unmonitored by Credit and Collection processes in C2M(CCB).

Manual Process: The CSR or Authorized User may activate a Service Agreement manually.

Automated Process: The SA Activation Background Process activates Pending Start Service Agreements.

|                           |                         |   |
|---------------------------|-------------------------|---|
| Process Plug-in enabled Y | Available Algorithm(s): | <div>SACR-AT – Automatically Activate Service Agreements</div> <div>NEW SA TO DO- creates a To Do entry when a Service Agreement is created</div> |
| Customizable process N    | Process Name:           | <div>SAACT – SA Activation Background Process activates pending start service agreements when all information is available.</div>                 |

Configuration required Y      Entities to Configure:

|         |
|---------|
| SA Type |
|---------|

**2.4 Create Customer Contact Group: SA Activation**

Actor/Role: C2M(CCB)

Description:

If configured, a Customer Contact can be automatically added when the Service Agreement is activated. If configured, the Customer Contact will be created whether the Service Agreement is activated online or in batch.

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

|  |
|--|
| SAAT-CC (SAAT-NB) to automatically add a customer contact when service agreement activated |
|--|

Configuration required Y      Entities to Configure:

|                                  |
|----------------------------------|
| Customer Contact Class           |
| Contact Type                     |
| Customer Contact Characteristics |
| SA Type                          |

**2.5 Provide NBB Enrollment Information**

Actor/Role: Customer or Self-Service Application User

Description:

The Customer or Self-Service Application User will request for non-billed budget enrollment via self-service application. They will provide NBB information and check for NBB eligibility.

**2.6 Request Check NBB Eligibility and Calculate Recommended NBB**

Actor/Role: Self-Service Application

Description:

The Self-Service Application will capture request for NBB enrollment.

**2.7 Transform Message and Send Request**

Actor/Role: OIC or SOA

Description

The Oracle Integration Cloud/SOA will capture the request from the Self-Service Application and pass it to the C2M system.

Customizable process Y      Process Name:

|                |
|----------------|
| Custom Process |
|----------------|

**2.8 Transform Message and Send Response**

Actor/Role: OIC or SOA

**Description**

The Oracle Integration Cloud/SOA will transform the response to Self-Service Application.

Customizable process Y

Process Name:

|                |
|----------------|
| Custom Process |
|----------------|

**2.9 Process Response**

**Actor/Role:** Self-Service Application

**Description:**

The Self-Service Application will process the response.

**3.0 Receive Message about Ineligibility for NBB Enrollment**

**Actor/Role:** Customer or Self-Service Application User

**Description:**

The Customer or Self-Service Application User will Receive Message about Ineligibility for NBB Enrollment.

**3.1 Review NBB Recommendation and Payment Schedule**

**Actor/Role:** Customer or Self-Service Application User

**Description:**

The Customer or Self-Service Application User will review NBB Recommendation and Payment Schedule.

**3.2 Connect with CSR for Manual Enrollment**

**Actor/Role:** Self-Service Application User

**Description:**

If the Customer or Self-Service Application User need any update to NBB Recommendation or Payment Schedule, they will connect with CSR for Manual Enrollment.

**3.3 Receive Message about Successful NBB Enrollment**

**Actor/Role:** Customer or Self-Service Application User

**Description:**

The Customer or Self-Service Application User will Receive Message Receive Message about Successful NBB Enrollment

Test Assets related to the Current Process

| Testing Asset<br>Sr.No | Use Case  | No Of Data<br>sets |
|------------------------|---|--------------------|
| 1                      | URM-C2M-3441b-001-Enroll-Customer-In-NBB-And-Manually-Activate-SA   | 2                  |
| 2                      | URM-C2M-3441b-002-Activate-Non-NBB-SA-Via-Batch-Process             | 1                  |
| 3                      | URM-C2M-3441b-003-Setup-Acct-Autopay-And-Enroll-In-NBB-With-Autopay | 1                  |

## Document Control

### Change Record

| Date       | Author          | Version | Change Reference  |
|------------|-----------------|---------|---|
| 5/18/09    | Colleen King    |         | Multiple Changes in April – and updated now for new guidelines    |
| 8/27/09    | Colleen King    |         | After June review Galina and Nick and based on updated guidelines |
| 10/21/10   | Geir Hedman     |         | Updated Title and Content page                                    |
| 10/13/10   | Galina Polonsky | V1      | Reviewed, Approved  |
| 12/3/01    | Ze'ev Lavee     |         | Technical Updates for Algorithms                                  |
| 2/8/11     | Geir Hedman     |         | Updated Document and Visio  |
| 9/3/2013   | Don Lee         |         | Updated Document  |
| 09/12/13   | Galina Polonsky |         | Reviewed, Approved  |
| 09/07/2017 | Ekta Dua        |         | Updated doc and visio to v2.6                                     |
| 09-19-2017 | James Foreman   |         | Updated algorithms  |
| 09/29/2017 | Galina Polonsky |         | Reviewed, Approved  |
| 06/03/2019 | Satya Kalavala  |         | Updated format for v2.7   |
| 07/18/2024 | Kunal Nerkar    |         | Updated Document and Visio for C2M v2.9                           |
| 10/23/2024 | Line Prado      |         | Reviewed  |
| 12/18/2024 | Galina Polonsky |         | Reviewed, Approved  |

Attachments:

Account/Non-Billed Budget

ORACLE Customer Cloud Service

Home

Menu

Admin

Search Menu

History

Account

Bookmark

Delete

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

ACCOUNT

Beale,Shirley, Residential, \$0.00

ACCOUNT ID12028261969

SET UP DATE02-28-2020

CURRENCY CODEUnited States Dollars

CUSTOMER CLASSResidential

ACCESS GROUP\*\*\*System Default

CIS DIVISIONCalifornia

PROTECT CIS DIVISION

MANAGEMENT GROUP

COMMENT

BILL CYCLE

BILL AFTER

PROTECT BILL CYCLE

BILL PRINT INTERCEPT

MAILING PREMISE ID13507379521520 Pine Street, San Francisco, CA, 94105

PROTECT MAILING PREMISE

|  | DEBT CLASS            | CURRENT BALANCE | PAYOFF BALANCE |
|--|-----------------------|-----------------|----------------|
|  | Non-billed Budget     | \$0.00          | \$-122.28      |
|  | Standard utility debt | \$0.00          | \$0.00         |

3.4.4.1b C2M.Enroll in Non-Billed Budget

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**ORACLE** Customer Cloud Service

Home Menu Admin Search Menu History

### Non-billed Budget

Bookmark Clear Save Refresh

Main History

NON-BILLED BUDGET SA California / NBB-MRR, Active, 07-06-2019, 1208042338 SA ID 1208042338

ACCOUNT ID 1202826196 Beale, Shirley, Residential, \$0.00

CIS DIVISION California SCHED PAYMENT AUTO PAY Excluded from Auto Pay

SA TYPE NBB-MRR NBB-MRR

RECOMMENDATION RULE MON-10A Monthly Schedule - 12 Months - 10% Adj

CURRENT BALANCE \$0.00 START DATE 07-06-2019 END DATE

PAYOFF BALANCE \$-122.28 EXPIRATION DATE 07-14-2020 RENEWAL DATE 07-04-2020

RECOMMENDATION RULE PARAMETER VALUES

| PARAMETER  | VALUE |
|--|-------|
| Rounding Rule (D - round down, U - round up)                     | U     |
| Rounding Unit (nearest integer to round to)                      | 1     |
| Day of Month   | 15    |
| Number of Payments in Schedule                                   | 12    |
| True-up Rule (E - exclude, S - spread, F - add to first payment) | S     |

SCHEDULED PAYMENTS

|   |  | DATE       | AMOUNT   |
|---|--|------------|----------|
| + |  | 01-15-2020 | \$182.00 |
| + |  | 02-18-2020 | \$182.00 |
| + |  | 03-16-2020 | \$182.00 |
| + |  | 04-15-2020 | \$182.00 |
| + |  | 05-15-2020 | \$182.00 |
| + |  | 06-15-2020 | \$182.00 |

TOTAL OF SCHEDULED PAYMENTS \$1,092.00

COVERED SERVICE AGREEMENTS

|   |  | COVERED SA | SA INFORMATION  | CURRENT BALANCE | PAYOFF BALANCE |
|---|--|------------|---|-----------------|----------------|
| + |  | 1202234012 | California / Waste Water Residential (quart, WWDFLT, Active, 01-01-2018, 1202234012 | \$0.00          | \$0.00         |
| + |  | 1203790429 | California / Water Residential (quarterly), WDFLT, Active, 01-01-2018, 1203790429   | \$0.00          | \$0.00         |

ACTION Recommend Renew Break

Non-Billed Budget Recommendation Rule

ORACLE<sup>®</sup> Customer Cloud Service

Home

Menu ▾

Admin ▾

Q

Search Menu

History ▾

←

→

NBB Recommendation Rule

BookmarkDuplicate

Main

RECOMMENDATION RULE

MON-10A

Q

DESCRIPTION

Monthly Schedule - 12 Months - 10% Adj

AVERAGE DAILY AMOUNT ALGORITHM

C2M-NBDA-10

Q

NBB Daily Amount Calculation with 10 Percent Adj

PAYMENT SCHEDULE ALGORITHM TYPE

NBPS-MON

Q

NBB Payment Schedule - Monthly

PAYMENT SCHEDULE PARAMETERS

←

"1" of "1"

→ +

🗑

EFFECTIVE DATE

01-01-1950

📅

| PARAMETER  | SEQUENCE | NBB RULE PARAMETER VALUE | OVERRIDE      | REQUIRED |
|--|----------|--------------------------|---------------|----------|
| Rounding Rule (D - round down, U - round up)                     | 10       | U                        | Not Allowed ▾ | Yes      |
| Rounding Unit (nearest integer to round to)                      | 20       | 1                        | Not Allowed ▾ | Yes      |
| Day of Month   | 30       | 15                       | Allowed ▾     | Yes      |
| Number of Payments in Schedule                                   | 40       | 12                       | Allowed ▾     | Yes      |
| True-up Rule (E - exclude, S - spread, F - add to first payment) | 50       | S                        | Allowed ▾     | Yes      |

Admin Menu/Installation Options

Installation Options Control Central Alert Algorithms

C1HNBBSA - Highlight Non-Billed Budget SA