



C2M v2.9

3.4.4.2a Monitor and True Up Budget

Creation Date: April 3, 2009
Last Updated: January 29, 2025

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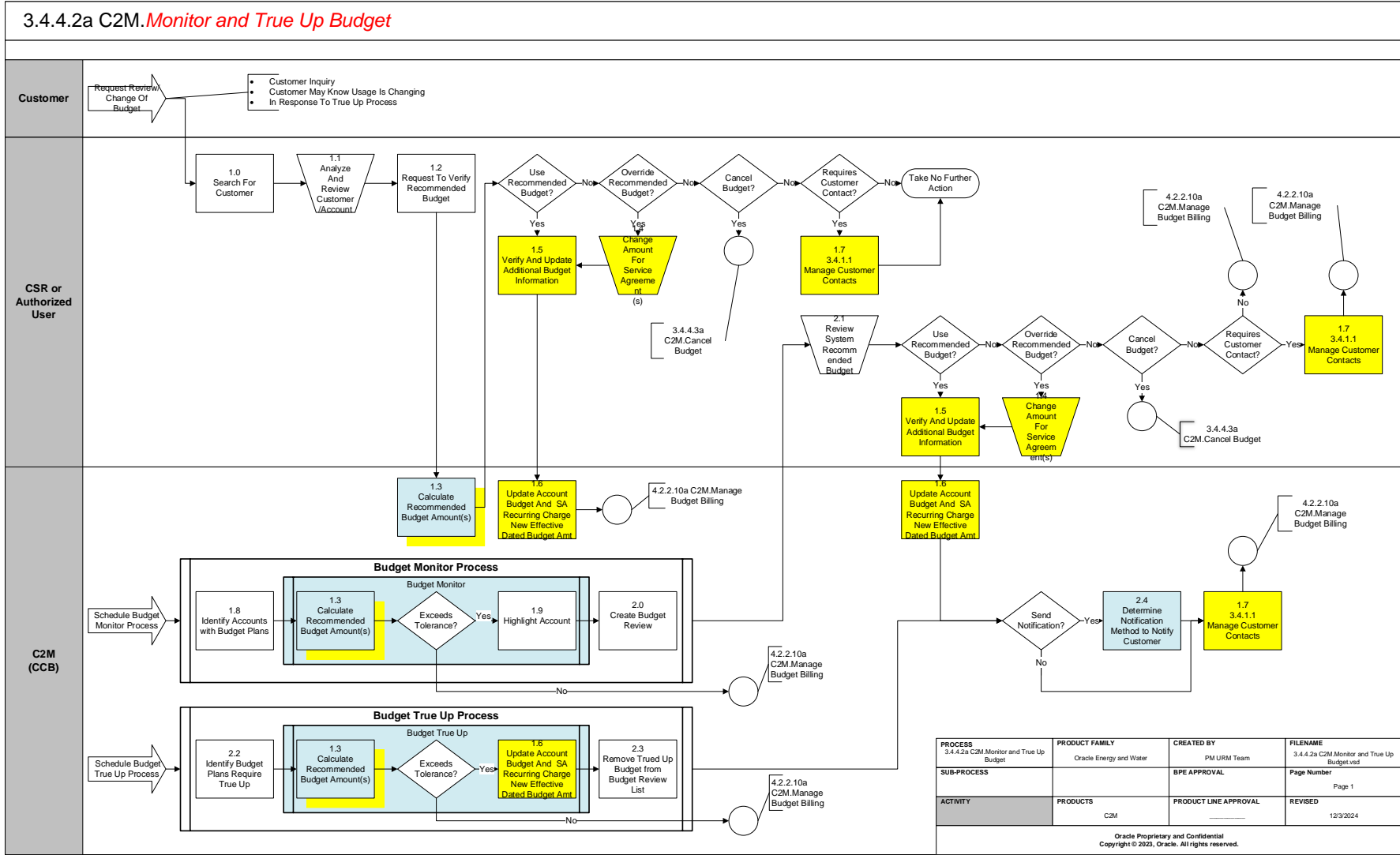
Brief Description

Business Process:	3.4.4.2a C2M.Monitor and True Up Budget
Process Type:	Sub-process
Parent Process:	3.4.4 C2M.Manage Budget
Sibling Processes:	3.4.4.1a C2M.Enroll in Budget, 3.4.4.3a C2M.Cancel Budget, 4.2.2.10a C2M.Manage Budget Billing, 4.3.1.1aC2M. Process Budget Payments, 3.4.1.1 C2M.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



PROCESS	3.4.4.2a C2M Monitor and True Up Budget	PRODUCT FAMILY	Oracle Energy and Water	CREATED BY	PM URM Team	FILENAME	3.4.4.2a C2M Monitor and True Up Budget.vsd
SUB-PROCESS				BPE APPROVAL		Page Number	Page 1
ACTIVITY		PRODUCTS	C2M	PRODUCT LINE APPROVAL		REVISED	12/3/2024

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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/N) **Available Algorithm(s):**

Installation Options – Control Central Alerts

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 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 2.3 Budget True Up for details)

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

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

Configuration required Y **Entities to Configure:**

Budget Plan
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 2.3 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.

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

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

Configuration required N Process:

BUDTRUP True up budgets

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

Business Object (Y/N)

Business Object

analyzes all customers with a Budget Plan and highlights those where the current Budget amount doesn't satisfy business requirements for Budget amount.

C1-BudgetPlanPhysicalBo - Physical BO for Budget Plan

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/N)

Available Algorithm(s):

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.

Configuration required Y

Entities to Configure:

Budget Plan

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.Monitor

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.

Process Plug-in enabled (Y/N)

Available Algorithm(s):

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.

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.Monitor

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.

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

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:

Business Object (Y/N) Business Object

Budget Plan

C1-BudgetPlanPhysicalBo - Physical BO for Budget Plan

Customizable process: N

Budget True Up (BUDTRUP) - The Budget True Up process periodically performs true up on a 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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2.4 Determine Notification Method to Notify Customer

Actor/Role: C2M(CCB)

Description:

C2M(CCB) sends notification to customer about the budget update when the account budget is updated via the Budget Monitor background process or when manually updated from the Budget Review Portal.

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

C1-NTF-DFPRF - Determine Default Contact for Notification Type
C1CRETMPLNTF – Create Template-Based Notification
C1-NT-VALCC - Validate Contact Class and Contact Type (BO Pre-Processing)
C1NTTSUBVL - Template-Based Subscription Notification Type Validation
C1BUDNFTMPD - Budget Notification Template Data

Business Object (Y/N)

Business Object

C1-NotifTypeTmpSubscription - Template-Based Subscription Notification Type

Configuration required Y

Entities to Configure:

Notification Event Type
Customer Contact Class
Customer Contact Type
Master Configuration
Notification Type

Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets
1	URM-C2M-3442a-001-Manually-Review-Budget-And-Override-Recommended-Amt	3
2	URM-C2M-3442a-002-Manually-Review-Budget-And-Update-With-New-Recommended-Amt	3
3	URM-C2M-3442a-003-Review-Account-Budget-Via-Budget-Monitor-Batch-Process	3
4	URM-C2M-3442a-004-Auto-Update-Accts-With-Budget-Via-Budget-True-Up-Batch-Process	3

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
08/03/2024	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/Budget

Account

BookmarkDeleteClearSaveRefresh

MainAuto PayPersonsFinancial BalancesBill MessagesC & CBudgetDepositsCharacteristicsAlertsAccount Portal

ACCOUNTKunal,Budget Bill, Residential, \$39.27ACCOUNT ID0073658846

Recommend BudgetCancel Budget

BUDGET PLANResidential Budget Plan

NEW BUDGET DATE07-19-2023

CURRENT ACCOUNT BUDGET\$39.00

RECOMMENDED ACCOUNT BUDGET\$0.00

SERVICE AGREEMENT	LAST CHANGED DATE	CURRENT BUDGET	RECOMMENDED BUDGET
California / Electric Residential, ERES1, Active, 01-01-2020, Single family - no seasonal factors, 0074674279	02-01-2020	\$39.00	\$0.00

Admin Menu/Budget Plan

Budget Plan

BookmarkPrevious ItemDuplicateDeleteClearSaveRefresh

Main

BUDGET PLANRES-BUD

DESCRIPTIONResidential Budget Plan

CIS DIVISION

CALCULATION ALGORITHMC2M-RBUDCALCAvg of last 12 months + 5%, round up to nearest \$1

MONITOR ALGORITHMC2M-RBUDMONHighlight customer if budget amount > 30% off

TRUE UP ALGORITHMC2M-RBUDTUPChange budget if new budget > 30% different

MONTHS FOR TRUE UP12

Service Agreement/Chars, Qty, & Rec Chg

Service Agreement

Bookmark

Clear

Save

Refresh

MainRate InfoSA/SPChars, Qty & Rec. ChargesMiscContract OptionsBilling ScenarioSA Portal

SA INFO

California / Electric Residential, ERES1, Active, 01-01-2020, Single family - no seasonal factors, 0074674279

SA ID0074674279

CHARACTERISTICS

		EFFECTIVE DATE	CHARACTERISTIC TYPE	CHARACTERISTIC VALUE
+		01-01-2020		

CONTRACT QUANTITY

		EFFECTIVE DATE	CONTRACT QUANTITY TYPE	CONTRACT QUANTITY
+		01-01-2020		

BUDGET AMOUNT

		EFFECTIVE DATE	RECURRING CHARGE AMOUNT
+		02-01-2020	\$39.00

3.4.4.2a C2M.Monitor and True Up Budget

Account Financial History

Account Financial History

Main

Account Financial History ⓘ

SEARCH BYArrears Date

Expand Filters

	ARREARS DATE	FINANCIAL TRANSACTION TYPE	CURRENT AMOUNT	CURRENT BALANCE	PAYOFF AMOUNT	PAYOFF BALANCE
1		Synch cur bal w/ payoff bal	\$197.85	\$276.12	\$0.00	\$276.12
2	03-01-2020	Bill Segment	\$39.00	\$78.27	\$236.85	\$276.12
3	03-01-2020	Late payment charge	\$1.15	\$39.27	\$1.15	\$39.27
4	02-01-2020	Bill Segment	\$38.12	\$38.12	\$38.12	\$38.12

Billing History

SA Billing History

BookmarkClearSaveRefresh







Main

ACCOUNT ID0073658846 Kunal,Budget Bill, Residential, \$276.12

SA INFORMATIONCalifornia / Electric Residential, ERES1, Active, 01-01-2020, Single family - no seasonal factors, 0074674279SA ID0074674279

	START DATE	END DATE	DAYS	STATUS	CURRENT AMOUNT	PAYOFF AMOUNT	UOM	BILLABLE SERVICE QUANTITY	AVERAGE DAILY SERVICE QUANTITY
	02-01-2020	03-01-2020	29	Frozen	\$39.00	\$236.85	Kilowatt-Hours	2200.000000	75.86
	01-01-2020	02-01-2020	32	Frozen	\$38.12	\$38.12	Kilowatt-Hours	300.000000	9.38

Notification Event Type

Notification Event Type List						
	NOTIFICATION EVENT TYPE	NOTIFICATION TYPE	NOTIFICATION METHOD	STATUS	ADD/EDIT	DELETE
 1	Budget Monitor		Send Letter Only	Active		
 2	Budget Review Page		Send Letter Only	Active		

Budget Review

Budget Review

BookmarkRefresh

Main

Budget Review ⓘ

⌵⌵⌵

Worked

<input type="checkbox"/>		ACCOUNT INFORMATION ⓘ	ACCOUNT ID	BUDGET PLAN	REVIEW DATE	NEXT BILL DATE	CURRENT BUDGET	RECOMMENDED BUDGET
<input type="checkbox"/>	✎	URM-UTA-SD,Person_33173, Residential, \$0.00	2028175356	Residential Budget Plan	03-01-2020		\$98.00	\$300.00
<input type="checkbox"/>	✎	JT-SD,Person_17000, Residential, \$-15.00	2868347210	Residential Budget Plan	03-01-2020		\$20.00	\$33.00
<input type="checkbox"/>	✎	Test,C2MO 5.1.5.2-001A.487, Residential, \$0.00	5670967182	Residential Budget Plan	03-01-2020		\$1,000.00	\$494.00

3 Results. Page 1 of 1 (3 records).

Home

Menu

Admin

Search Menu

History

Control Central Search

Budget R

Update Account Budget

Main

Budget

Work

☐

☐

☐

☐

3 Results. F

Account Budget

ACCOUNT
BUDGET PLAN
NEW BUDGET DATE
CURRENT ACCOUNT BUDGET
RECOMMENDED ACCOUNT BUDGET

Test,C2MO 5.1.5.2-001A.487, Residential, \$0.00
Residential Budget Plan
08-03-2023
\$494.00
\$494.00

SERVICE AGREEMENT	LAST CHANGED DATE	CURRENT BUDGET	RECOMMENDED BUDGET
California / Electric lighting unmetered, E-LIGHT, Active, 01-01-2020, 5679631950	07-19-2023	\$494.00	\$494.00

SaveCancel