



C2M v2.9

3.4.4.2b Renew Non-Billed Budget

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Brief Description

Business Process:	3.4.4.2b C2M.Renew Non-Billed Budget
Process Type:	Sub Process
Parent Process:	3.4.4 C2M.Manage Budget
Sibling Processes:	4.3.1 C2M.Perform Settlement Activities, 4.1.1.4 C2M.Develop Arrears Procedures, 4.2.2 C2M.Manage Bill, 3.4.1 C2M.Manage Contacts, 3.3.2.2 C2M.Start Non-Premise Based Service, 3.3.2.4 C2M.Stop Non-Premise Based Service

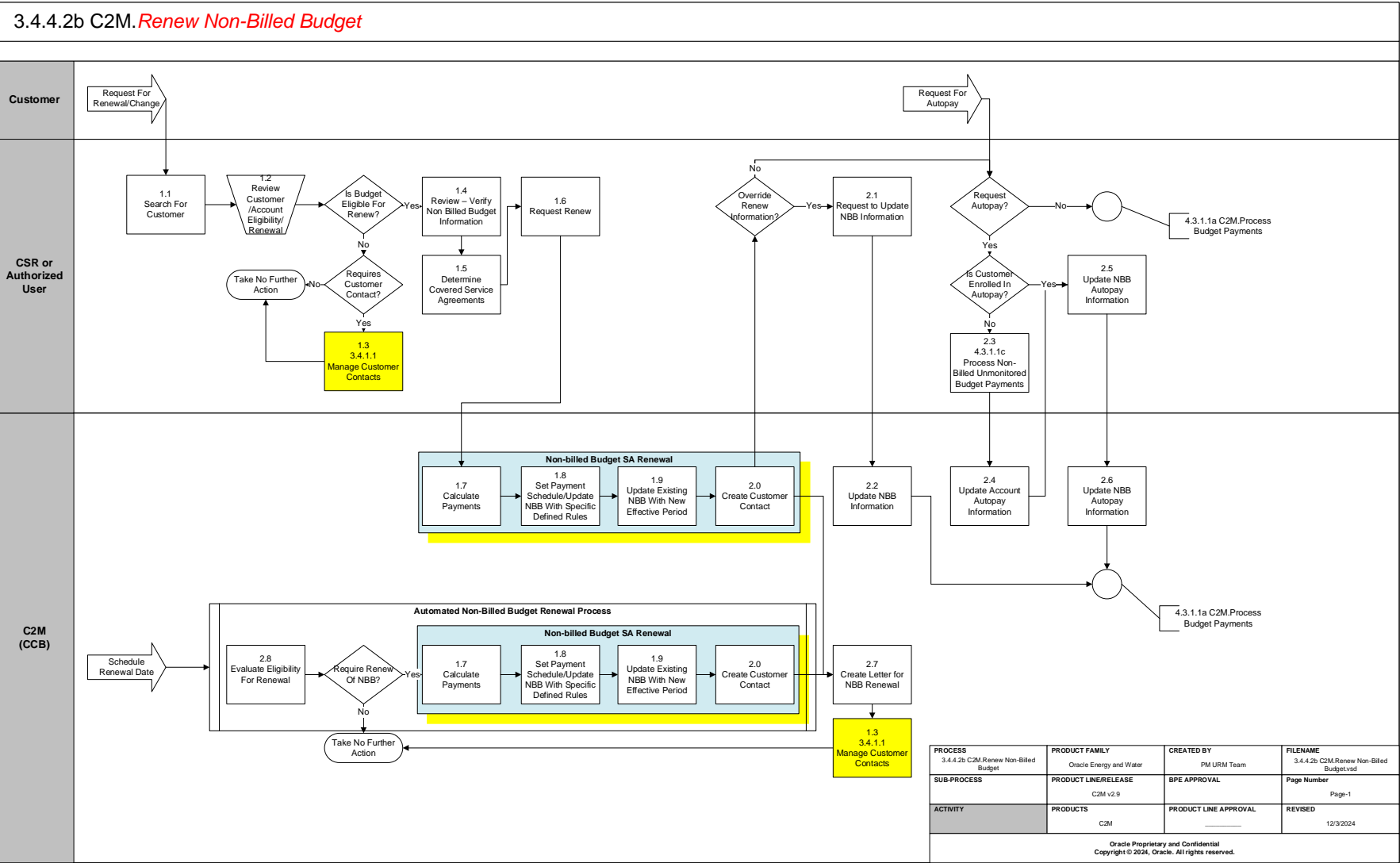
This process describes the activities associated with updating as well as renewal for a [Non Billed Budget](#).

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



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 Group: Automated Non Billed Budget Renewal Process

Group: Non-billed Budget SA Renewal

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 Group: Automated Non-Billed Budget Renewal Process

Group: Non-billed Budget SA Renewal

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 Group: Automated Non-Billed Budget Renewal Process **Group: Non-billed Budget SA Renewal**

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 Group: Automated Non-Billed Budget Renewal Process **Group: Non-billed Budget SA Renewal**

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

2.1 Request to 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.

2.2 Update Non-Billed Budget Information

Actor/Role: C2M(CCB)

Description:

The [Non-Billed Budget](#) information is then updated in C2M(CCB).

2.3 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.

2.4 Update Account Autopay Information

Actor/Role: C2M(CCB)

Description:

Autopay information is updated in C2M(CCB).

2.5 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.

2.6 Update Non-Billed Budget Autopay Information

Actor/Role: C2M(CCB)

Description:

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

2.7 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.

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

Customizable process N Process Name:

Various algorithms – two algorithm types included in base package are LTEXGEN – Generic Letter Extract, C1-LTREX-RPT – Create letter using reporting engine

Configuration required Y Entities to Configure:

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.

Letter Template and Template defined on associated Customer Contact Type

2.8 Evaluate Eligibility for Renewal Group: Automated Non-Billed Budget Renewal Process

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 Assets related to the Current Process

Testing Asset Sr.No	Use Case	No Of Data sets
1	URM-C2M-3442b-001-Renew-Non-Billed-Budget-SA	3
2	URM-C2M-3442b-002-Renew-Non-Billed-Budget-SA-Via-Batch-Process	3

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
09/13/2024	Kunal Nerkar		Updated Document and Visio for C2M v2.9
10/23/2024	Line Prado		Reviewed/ Approved
12/18/2024	Galina Polonsky		Reviewed, Approved

Attachments:

Account/Non-Billed Budget

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 ID

1202826196

9

SET UP DATE

02-28-2020

CURRENCY CODE

United States Dollars

CUSTOMER CLASS

Residential

ACCESS GROUP

System Default

CIS DIVISION

California

PROTECT CIS DIVISION

MANAGEMENT GROUP

COMMENT

BILL CYCLE

BILL AFTER

PROTECT BILL CYCLE

BILL PRINT INTERCEPT

MAILING PREMISE ID

1350737952

1520 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

Non-billed Budget

Bookmark

Clear

Save

MainHistory

NON-BILLED BUDGET SA

California / NBB-MRR, Active, 07-06-2019, 1208042338

SA ID 1208042338

ACCOUNT ID1202826196Beale, Shirley, Residential, \$0.00

CIS DIVISIONCalifornia

SA typenbb-mrrNBB-MRR

RECOMMENDATION RULEMON-10AMonthly Schedule - 12 Months - 10% Adj

CURRENT BALANCE\$0.00

PAYOFF BALANCE\$-122.28

SCHED PAYMENT AUTO PAYExcluded from Auto Pay

START DATE07-06-2019

END DATE

EXPIRATION DATE07-11-2023

RENEWAL DATE07-01-2023

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	10
Number of Payments in Schedule	24
True-up Rule (E - exclude, S - spread, F - add to first payment)	S

SCHEDULED PAYMENTS

		DATE	AMOUNT
+		12-12-2022	\$181.00
+		01-10-2023	\$181.00
+		02-10-2023	\$181.00
+		03-10-2023	\$181.00
+		04-10-2023	\$181.00
+		05-10-2023	\$181.00
+		06-12-2023	\$181.00

TOTAL OF SCHEDULED PAYMENTS \$7,596.00

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

Admin Menu/Non Billed Budget Recommendation Rule

NBB Recommendation Rule

Bookmark

Duplicate

Main

RECOMMENDATION RULE

* MON-10A

DESCRIPTION

* Monthly Schedule - 12 Months - 10% Adj

AVERAGE DAILY AMOUNT ALGORITHM

C2M-NBDA-10

NBB Daily Amount Calculation with 10 Percent Adj

PAYMENT SCHEDULE ALGORITHM TYPE

NBPS-MON

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	<div>U</div>	<div>* Not Allowed</div>	Yes
Rounding Unit (nearest integer to round to)	20	<div>1</div>	<div>* Not Allowed</div>	Yes
Day of Month	30	<div>15</div>	<div>* Allowed</div>	Yes
Number of Payments in Schedule	40	<div>12</div>	<div>* Allowed</div>	Yes
True-up Rule (E - exclude, S - spread, F - add to first payment)	50	<div>S</div>	<div>* Allowed</div>	Yes

Admin Menu/Installation Options

Installation Options Control Central Alert Algorithms

C1HNBBSA - Highlight Non-Billed Budget SA

Customer Contact Created After Renewal

Customer Contact: Beale,Shirley, , Non-billed budget contacts / Non-billed budget renewed, Cont...

AddSearchBookmarkRefresh

MainLog

Customer Contact

Main ⓘ

INFORMATION

Beale,Shirley, , Non-billed budget contacts / Non-billed budget renewed, Contacted 08-15-2019

CONTACT CLASS

Non-billed budget contacts

CONTACT TYPE

Non-billed budget renewed

USER

Nerkar, Kunal

PERSON

Beale,Shirley ⓘ

ACCOUNT

Beale,Shirley, Residential, \$0.00 ⓘ

PREMISE

PREFERRED CONTACT METHOD

Record Actions ⓘ

Edit

Record Information

Characteristics

CHARACTERISTIC TYPE

CHARACTERISTIC VALUE

Customer Contact Reminders ⓘ

Add Reminder ⓘ ⓘ