



**C2M v2.9**

**3.4.4.3a Cancel Budget**

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## Brief Description

**Business Process:** 3.4.4.3a C2M.Cancel Budget

**Process Type:** Sub Process

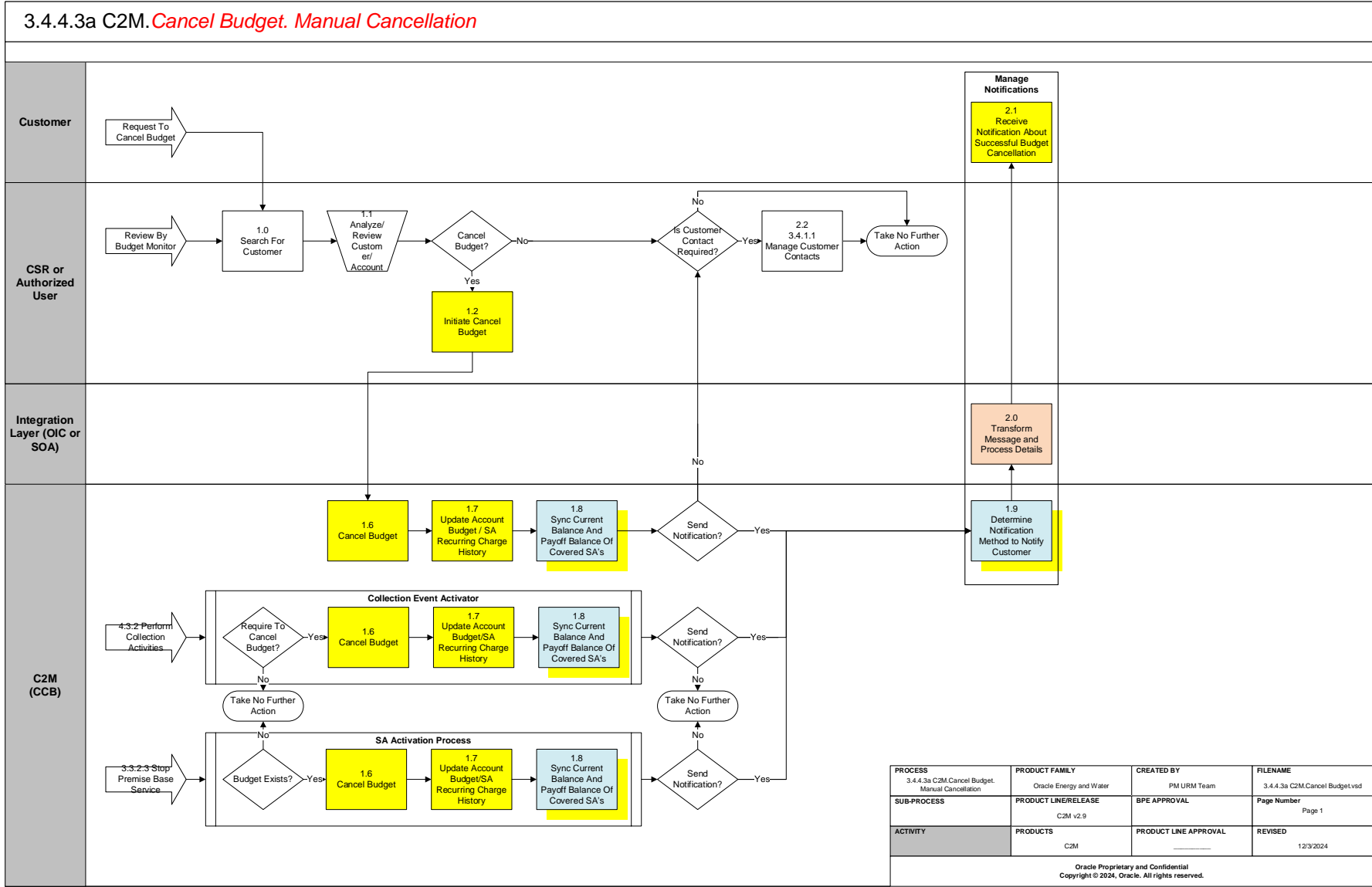
**Parent Process:** 3.4.4 C2M.Manage Budget

**Sibling Processes:** 3.4.4.2a C2M.Monitor and True Up Budget, 3.4.4.3a C2M.Enroll in Budget, 4.2.2.10a C2M.Manage Budget Billing, 4.3.1.1a C2M.Process Budget Payments, 4.3.2.1 C2M.Manage Collection Process, 3.4.1.1 C2M.Manage Customer Contacts,

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

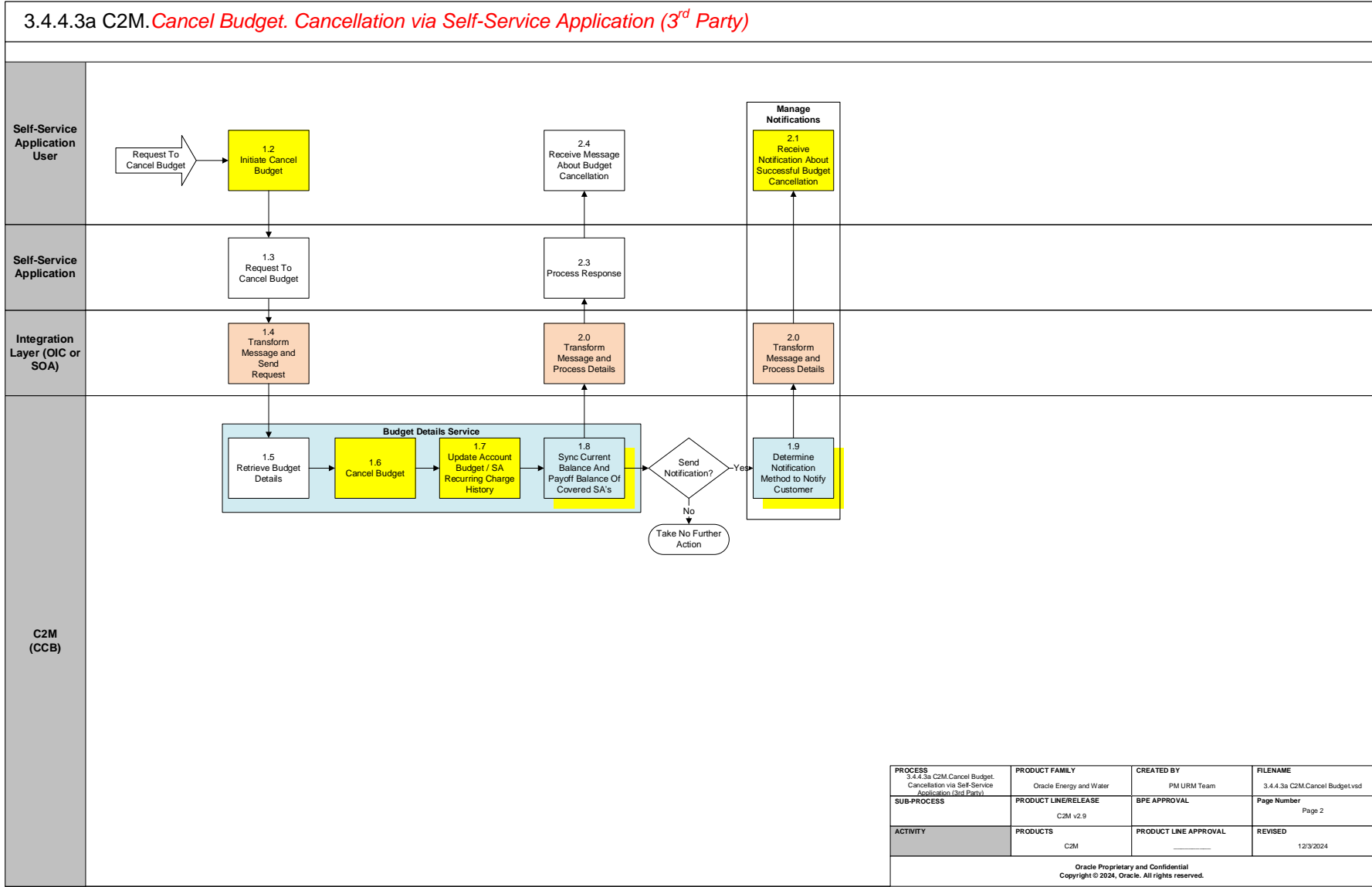
- Customer Inquiry
- Collection Process Event
- Stop Service

Business Process Model Page 1



Business Process Model

Page 2



## 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). The [Customer 360](#) portal provide the CSR or Authorized User with valuable insight for overall budget related analysis of the customer.

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

Installation Options – Control Central Alerts
C1CIBUDGENRL - Budget Billing Enrollment

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

Insight Group
Insight Type

### 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.

### 1.2 Initiate Cancel Budget

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

**Description:**

At [Account](#) level the CSR or Authorized User will cancel the Budget.  
The request for budget cancellation can also be initiated from Self-Service Application User.

### 1.3 Request to Cancel Budget

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

**Description:**

The Self-Service Application will capture request for budget cancellation.

### 1.4 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
----------------

**1.5 Retrieve Budget Details****Actor/Role:** C2M(CC&B)**Description:**

The C2M(CCB) will retrieve budget details and initiate budget cancellation.

**Scripts(s):**

C1BudgetDeta - Budget Details Service

**Inbound Web Service(s):**

C1-Budget – Budget

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

The Budget is canceled in C2M(CC&amp;B).

**Manual Process:** The C2M (CCB) will cancel the budget based on request from the CSR or Authorized User on the basis of established business rules.**Automated Process:** The C2M (CCB) will cancel the budget:

- i) During collection process (if the collection process contains a Cancel Budget collection event)
- ii) When the service agreement is stopped.

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

COLL COND BG - Check if account is on a budget

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

Collection Event Type

Collection Process Template

Collection Class Control

**Scripts(s):**

C1BudgetDeta - Budget Details Service

**Inbound Web Service(s):**

C1-Budget – Budget

**Customizable process N**      **Collection Event:**

The Collection Event Trigger –CET will activate a collection event to cancel the Budget

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.**1.7 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.

**Scripts(s):**

C1BudgetDeta - Budget Details Service
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**Inbound Web Service(s):**

C1-Budget – Budget
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**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

**1.8 Sync Current Balance And Payoff Balance Of Covered SA’s**

**Actor/Role:** C2M(CC&B)

**Description:**

C2M(CCB) synchronizes Each Service Agreement’s Current Balance with its payoff balance (using sync adjustment type defined on the Service Agreement’s SA type).

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

C1-ADJT-CA - Payoff Amt = 0 / Current Amt = Adj Amount (no GL)
--

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

Adjustment Type
SA Type

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

**1.9 Determine Notification Method to Notify Customer**

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

**Description:**

C2M(CCB) determines the notification preference set by customer and initiates notification through preferred delivery method.

**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

Business Object (Y/N)	Business Object	C1BUDNFTMPD - Budget Notification Template Data
		C1-NotifTypeTmpSubsription - Template-Based Subscription Notification Type
Configuration required Y	Entities to Configure:	Master Configuration
		Notification Type

**2.0 Transform Message and Process Details**

**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

**2.1 Receive Notification for Budget Cancellation**

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

**Description:**

The Customer or Self-Service Application User will Receive Notification about cancellation of Budget.

**2.2 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.

**2.3 Process Response**

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

**Description:**

The Self-Service Application will process the response about successful budget cancellation and initiate notification.

**2.4 Receive Message about Budget Cancellation**

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

**Description:**

The Customer or Self-Service Application User will Receive Message Receive Message about Successful Budget Cancellation.

## Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets
1	URM-C2M-3443a-001-Cancel-Existing-Budget	3
2	URM-C2M-3443a-002-Cancel-Existing-Budget-Via-Stop-SA	3
3	URM-C2M-3443a-003-Budget-Is-Cancelled-Via-Collection-Process	3

## 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
08/10/2024	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

Account

BookmarkDeleteClear

MainAuto PayPersonsFinancial BalancesBill MessagesC & CBudgetDepositsCharacteristicsAlertsAccount Portal

ACCOUNTKunal,Budget Bill, Residential, \$38.12ACCOUNT ID

Recommend BudgetCancel Budget

BUDGET PLANResidential Budget Plan

NEW BUDGET DATE08-10-2023

CURRENT ACCOUNT BUDGET\$0.00

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	03-01-2020	\$0.00	\$0.00

Service Agreement/Chars, Qty & Rec Charges

Service Agreement

Bookmark

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

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
+		* 03-01-2020	\$0.00
+		* 02-01-2020	\$39.00

Admin Menu/Budget Plan

Budget Plan

BookmarkPrevious ItemDuplicateDeleteClearSaveRefresh

Main

BUDGET PLAN

\* RES-BUD

DESCRIPTION

Residential Budget Plan

CIS DIVISION

CALCULATION ALGORITHM

C2M-RBUDCALC

Avg of last 12 months + 5%, round up to nearest \$1

MONITOR ALGORITHM

C2M-RBUDMON

Highlight customer if budget amount > 30% off

TRUE UP ALGORITHM

C2M-RBUDTUP

Change budget if new budget > 30% different

MONTHS FOR TRUE UP

12

Account Financial History

Account Financial History

Main

Account Financial History ⓘ

SEARCH BY

Arrears 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 ID

0073658846

Kunal,Budget Bill, Residential, \$276.12

SA INFORMATION

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

SA ID

0074674279

	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

Miscellaneous Information:

System supports communicating with the external system via RESTful services or via SOAP services. In both cases, the system uses an object called inbound web service (IWS) to store the configuration. A web service class is used to distinguish whether the IWS is used for REST or SOAP.

Inbound Web Services:

C1-Budget - Budget	REST
CXBudgetDetails - Retrieve Budget Details	SOAP
WXBudgetDetails - Retrieve Budget Details	SOAP